Tekla EPM Go 2022

User guide

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1 View and manage information remotely in Tekla EPM Go

Tekla EPM Go is a web application that allows users to access Tekla EPM information remotely using a mobile device. By using Tekla EPM Go, you can access status information, drawing files, and inventory information virtually anywhere, as long as there is an internet connection and the Tekla EPM Remote Server is running.

In Tekla EPM Go, you can:

- View and manage production control job information, such as drawing files, inspection test records, cut lists, and shipping information.
- View materials items and receive them into the inventory.
- Move items within the inventory.
- Add labor time to a production control job.
- Add, modify, and delete general inspection test records.

For more information, see the following links:

Install Tekla EPM Go (page 5)

Sign in to Tekla EPM Go (page 9)

View and manage production control job information (page 13)

Add time tracking records (page 63)

View and modify general inspection test records (page 68)

Sign out from Tekla EPM Go (page 11)

1.1 Install Tekla EPM Go

To install Tekla EPM Go, see the following requirements and instructions.

What is needed to set up a Tekla EPM Go website

The Tekla EPM support provides and sets up a web server for your company. You are responsible for having a server for the database. Tekla EPM Go uses the same database as Tekla EPM.

To have a Tekla EPM Go website set up, you need to provide the Tekla EPM support with the following information:

- The legal name of your company
- The existing domains or websites of your company
- Your company logo (preferably as a vector graphic)
- The address of your company as you want it to appear on the Tekla EPM Go website
- The company phone number as you want it to appear on the Tekla EPM Go website
- The company fax number or email address as you want it to appear on the Tekla EPM Go website
- A connection to your database (a static IP address, an A record, or a DDNS)
- The port that will be used for accessing the database.

  The default port is 9154.
- The phone number and email address of a contact person for setting up Tekla EPM Go and scheduling an eventual training.

Install the Tekla EPM Remote Server

The Tekla EPM Remote Server service listens for and responds to traffic from the web server component of Tekla EPM Go.

The Tekla EPM Remote Server is normally installed when you install the Tekla EPM desktop application, because it is also used for running automated events. You can also install the Tekla EPM Remote Server separately, if necessary.

The Tekla EPM Remote Server is typically installed on the Tekla EPM server computer. On whichever computer the Tekla EPM Remote Server is installed, a TCP port needs to be forwarded to that computer.

To install the install the Tekla EPM Remote Server, do the following:

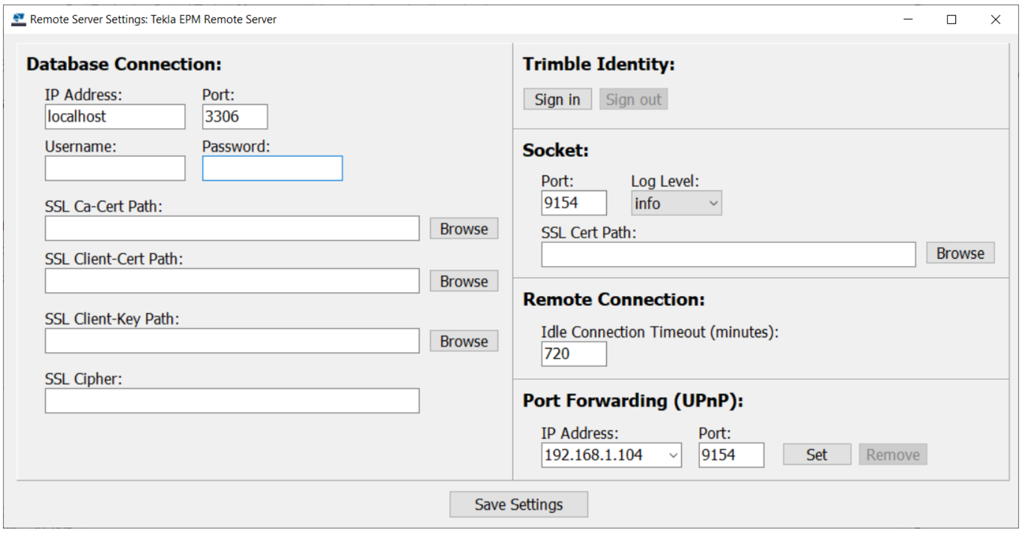
1. Go to `C:\Users\Public\Documents\Tekla\Tekla EPM\Backup`.
2. Double-click the `TeklaEPMRemoteServerSetup.exe` file to install the Tekla EPM Remote Server.
3. Use the default options for the installation.

The **Tekla EPM Remote Monitor** window opens automatically after the installation is finished. The **Tekla EPM Remote Monitor** window is where you can manage the Tekla EPM Remote Server settings.

Next, define the remote server settings.

Modify the remote server settings and start the Tekla EPM Remote Server

1. In the **Tekla EPM Remote Monitor** window, click **Settings** to see the IP address and port for the database connection.



   You do not need to type a username or password.

2. In the upper-right section of the window, click **Sign in** and sign in with a Trimble Identity that has access to all Trimble Connect projects of your company.

   If the Trimble Identity cannot access all Trimble Connect projects, the status information of Trimble Connect projects cannot be synced.

   If you do not sign in with a Trimble Identity, the Tekla EPM Remote Server will fail to start because it does not have the necessary license information.

3. If a TCP port othen than the default port (9154) has been set up for forwarding, enter the port number in the **Port** field in the **Socket** section.

4. Save the settings.

   If the settings have been defined successfully, the Tekla EPM Remote Server should start running. You can see if the remote server in the **Tekla EPM Remote Monitor** dialog box.

For troubleshooting, see Tekla EPM Remote Server and Tekla EPM Remote Monitor Overview.

Connection options to your Tekla EPM database

To allow us to connect to your system or network, select one of the following options:

- A dynamic DNS, or DDNS.

  A dynamic DNS is a service that provides you with a domain name or web address that stores and points to the public IP address of your system. This is useful if the network where your Tekla EPM server resides does not have a static public IP address.

  A script is installed on your computer or server that updates the public IP address on a regular interval. This way, if the public IP address changes for any reason, the web address still always points to the correct public IP address.

  There are several free sites that provide this service. Your internet service provider or website hosting provider may also include this already in their services.

- An A record.

  If you manage your own website, you can create an A record or web address to which you can manually assign your IP address.

  If your public IP address changes, you need to manually change the A record to reflect the change in the IP address.

- A static IP address.

  Note that if you use a static IP address:

  - Your internet service provider may want to charge you additional fees.
  - Trimble is not responsible for the down time due to changes in your IP address and cannot guaratnee a response time to fix this issue.

If you want to improve the security and protection for the connection to your Tekla EPM database, you can restrict the connection to the port to the following IP addresses:

- 100.25.80.52
- 23.20.111.82
- 100.24.217.156

- 18.223.67.252
- 54.241.216.243

Do not set the restriction until we have initially tested the connection.

NOTE The management of your system firewalls is extremely important, and the system firewall settings are solely your responsibility. Trimble is not responsible for any changes to these systems and cannot change the system firewall settings for you.

Directing the connection to the server installation of Tekla EPM

Next, you need to direct the connection to your system or network router to the server installation of Tekla EPM. To do so, set up TCP port forwarding. For more information on port forwarding, see Setting up port forwarding.

The port 9154 is the default port that is used for TCP port forwarding, but you can select any port.

Note that it is helpful for the Tekla EPM support staff if you use the default port whenever you call for help. Though it is unusual, there could potentially be multiple layers within your system, and the port used would have to be forwarded all the way to the server installation.

If there is a firewall on the computer used for the Tekla EPM server installation, you may need to create an inbound rule allowing the TCP port connection. The Tekla EPM Remote Server needs to be running on the server installation computer simultaneously.

1.2 Sign in to Tekla EPM Go

To sign in to Tekla EPM Go, you can use either your Tekla EPM user name and password or your Trimble Identity to sign in.

In order to sign in to Tekla EPM Go, you need to:

- Be added to your company's users as a Tekla EPM user or an external Tekla EPM user.

  We recommend that any Tekla EPM Go users within your company are added as Tekla EPM users and not external users, because external Tekla EPM users cannot see or select the most commonly used options in the lists available in Tekla EPM Go.
- Have the **Allow Tekla EPM Login** option enabled by your administrator if you are an internal Tekla EPM user.

- Have at least the **Allow Remote Login** option enabled by your administrator. Any other remote permissions allow you to perform actions in Tekla EPM Go.

  Note that the **admin** user that is created in Tekla EPM by default cannot have any remote permissions enabled, so you cannot sign in to Tekla EPM Go with that username.
- Have a password with of at least three characters set in Tekla EPM. You cannot sign in to Tekla EPM Go with a blank password.

If you are not sure if you have all the correct permissions, contact your administrator.

1. On your device, open Tekla EPM Remote Monitor and ensure that you have the Tekla EPM Remote Server running.
2. Open a browser and go to the Tekla EPM Go site of your company.

   The Tekla EPM Go sign-in page opens.

   You can save the Tekla EPM Go page of your company as a book mark.

   NOTE Do not save the Tekla EPM Go page as an application on your device. Saving Tekla EPM Go as an application would store the session ID. The session ID would expire the next time you sign in to Tekla EPM Go, and in consequence, the application would stop working.

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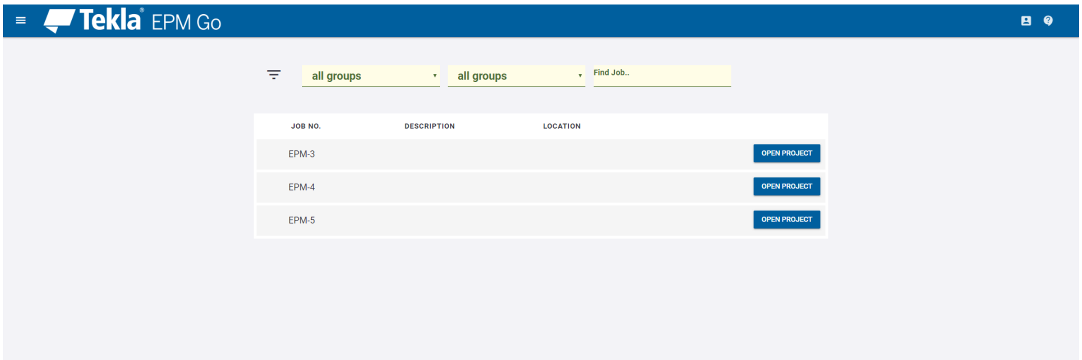
3. To change the language of Tekla EPM Go, click and select a language in the list.
4. Do any of the following:

To	Do this
Sign in with your Tekla EPM username and password	a. Type your Tekla EPM username and password in the available fields. b. Tap the **Log in** button.
Sign in with your Trimble Identity	Note that you need to have a Trimble Identity associated with your Tekla EPM user account in order to sign in with your Trimble Identity. a. Tap the **Trimble Identity Sign In** button. b. On the sign-in page, type your email address and password in the available fields. c. If you want to stay signed in with your Trimble Identity, select the **Stay signed in** check box. d. Tap **Sign in**.

The home page of Tekla EPM Go opens. You can see all the production control jobs that you have a remote permission to access.



See also

View and manage production control job information (page 13)

View and manage inventory materials (page 65)

Add time tracking records (page 63)

View and modify general inspection test records (page 68)

Sign out from Tekla EPM Go (page 11)

Sign out from Tekla EPM Go

To sign out from Tekla EPM Go:

1. In the upper-right corner of the Tekla EPM Go website, tap the **Account** button.
2. In the menu, select **Logout**.

You are signed out from Tekla EPM Go, and you return to the sign-in page.

1.3 Manage the production dashboard

Tekla EPM Go allows you to have a quick overview of your workshop operations as a high-level dashboard. You can view the overall production and shipping status, select which information is shown, and filter the information based on different criteria.

To access the production dashboards:

1. Tap the file menu icon (), and on the menu, select **Dashboard**.

The production dashboard opens.

In the **Productivity** list in the left-hand pane, you can select if you want to see dashboards related to your shop floor production, or shipping.

You can set filters to adjust which information is shown in the dashboards. For instructions, see Set and clear filters (page 15).

To otherwise manage which information is shown and how the information is shown, see the following instructions.

Select which data sets are shown in the dashboards

1. Tap above the dashboards.
2. Tap the check boxes next to the data sets that you want to show.

   Note that you can only select 3 data sets at a time. You might need to tap the selected check boxes to clear them.
3. To select whether the data set will be shown as a bar or a line, tap the desired style.
4. To update the dashboards, tap **Apply**.

See more details in a chart

1. Above the chart, tap .
2. In the list, select the details that you want to show in the chart.

   Note that you can only select one option.

The chart is updated to show the selected details.

Change the chart type

1. In the upper-right corner of a dashboard, tap one of the following options:

   - shows the information as a pie chart.
   - shows the information as a bar chart.

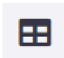
Change the time frame

- Do any of the following:

To	Do this
Set the time frame by week, month, quarter, or year	• Tap the **quick setup** list above the dashboards, and select the time frame that you want to see.
Set the time frame by start and end dates	1. Tap the start date field above the dashboards, and either type the start date, or select the date in the calendar. 2. Tap the end date field above the dashboards, and either type the end date, or select the date in the calendar.
Change the time units of the chart	• Tap the **Day/Week/Month/Year** list above the dashboards, and select the desired time unit.

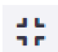
The time frame of all charts is updated.

View and export the chart data as a table

1. To open the table of dashboard information, tap  above the chart.
2. In the **Chart Data** dialog box, view the information in a table format.
3. To export the chart data as a table, tap **Export** in the upper-right corner of the **Chart Data** dialog box, and select the export format.

The table is downloaded onto your device in the selected format. Note that to open the table, you need to have a compatible application on your device.

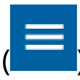
Expand or shrink charts

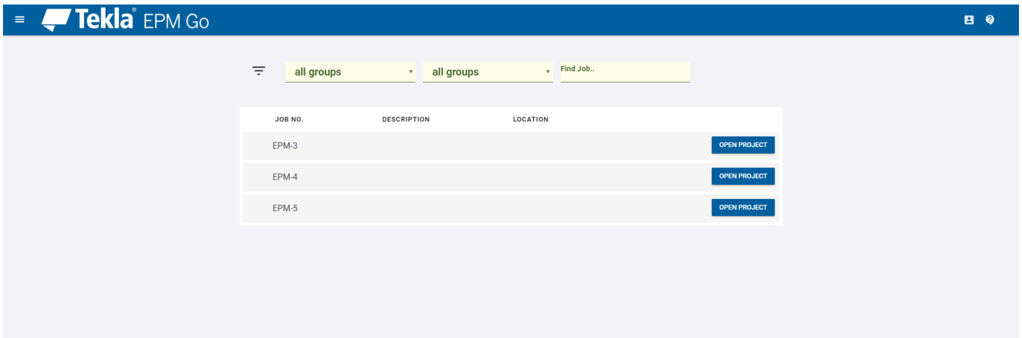
- To expand a chart, tap  above the chart.
- To shrink a chart, tap  above the chart.

1.4 View and manage production control job information

When you log in to Tekla EPM Go, the homepage that opens shows the list of production control jobs whose information you can view and manage. To view and filter the projects, do the following:

1. Ensure that you are in the projects view.

   If you are not, tap the file menu icon (), and in the menu, select **Projects**.

2. To find the desired project, do any of the following:

   - To filter the projects according to job groups set in the Tekla EPM desktop application, tap the arrows on the right side of the **all groups** lists, and select the primary and secondary job groups in the lists.

     The leftmost **all groups** list contains the primary job groups, whereas the rightmost **all groups** list contains the secondary job groups.

   - To search for a job, type the job number in the **Find Job** field.

   Note that only projects whose job status is set to **Open** in the Tekla EPM desktop application are available in Tekla EPM Go.

3. To view and manage the project details, tap **Open Project**.

See also

Set and clear filters (page 15)

Find and view assemblies (page 17)

View and manage drawings (page 18)

View sequences (page 26)

View inspection test records (page 27)

View cut lists and process items (page 30)

View item categories and sub-categories (page 35)

View transmittals (page 36)

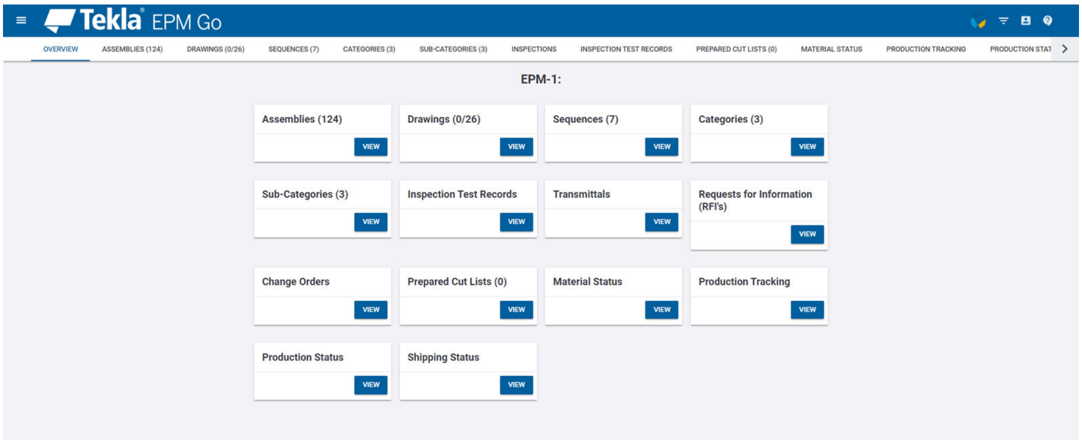
View requests for information (page 37)

[View change orders (page 38)]
View and modify production tracking statuses (page 39)
View and modify shipping information (page 42)
View the project schedule of a job (page 47)

Set and clear filters

When you are viewing a job, you can sort the information that is shown by applying filters. You can filter job information by main mark, drawing number, sequence, lot number, and item category or sub-category. You can also modify the applied filters, set multiple filters, and clear the filters to view all job information again.

Set filters



1. In the job view, tap the **Filters** () button in the upper-right corner.

   Any currently applied filters are shown.

2. Do any of the following:

   - To set the filtering criteria by selecting check boxes, tap the **Checkboxes** button on the right side of the **Filters** dialog box.
   - To set the filtering criteria by selecting options in lists, tap the **Select** button on the right side of the **Filters** dialog box.

3. Tap the arrow on the right side of the **Select Filter** list, and select the filter that you want to apply.

4. Select the values that you want to use for filtering.

   For example, if you want to filter the job information according to the drawing number, select the desired drawing numbers.

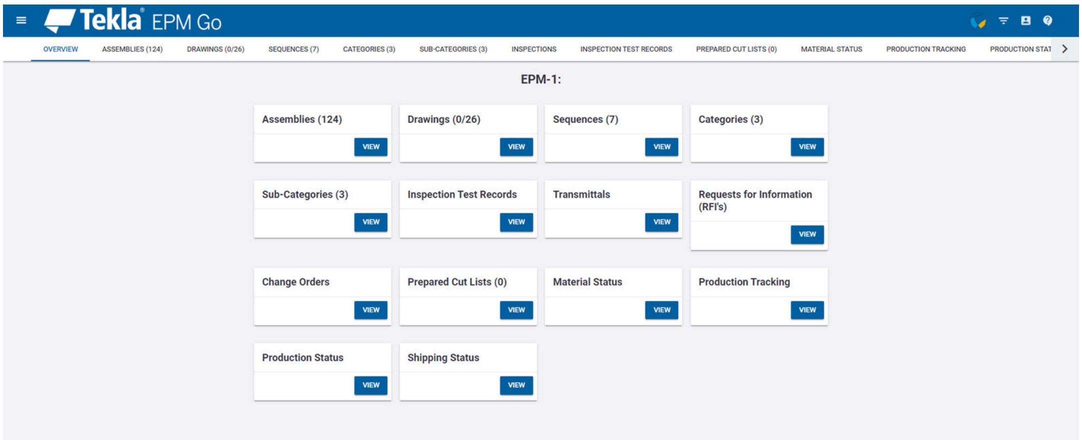
   You can select multiple values.

5. Tap **Apply Filters**.

   Only information that matches the filters that you applied is shown.

   To apply more filters, repeat steps 1 to 4.

Modify filters

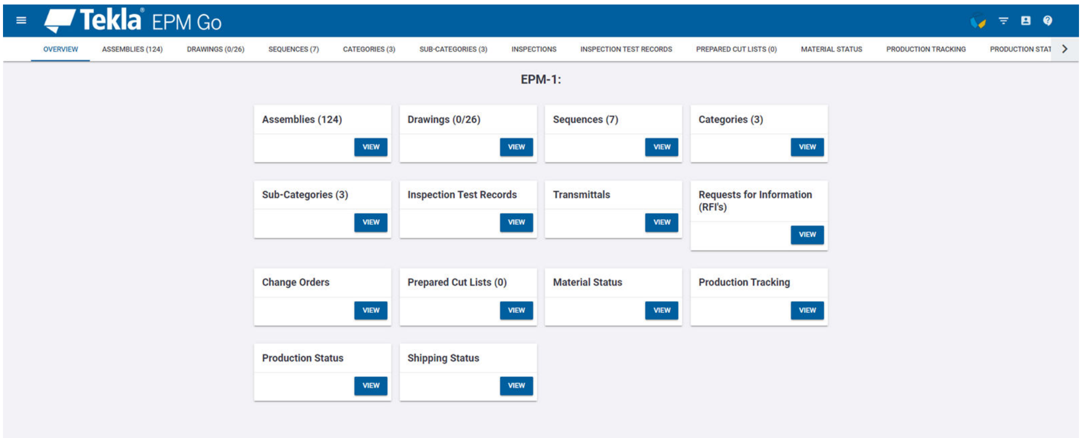


1. In the job view, tap the **Filters** ( ) button in the upper-right corner.

   The currently applied filters are shown.
2. Tap **Edit** under the filter that you want to modify.
3. Select or add new values that you want to use for filtering.
4. Tap **Apply Filters**.

   Only information that matches the filters that you applied is shown.

Clear filters



1. In the job view, tap the **Filters** ( ) button in the upper-right corner.

   The currently applied filters are shown.

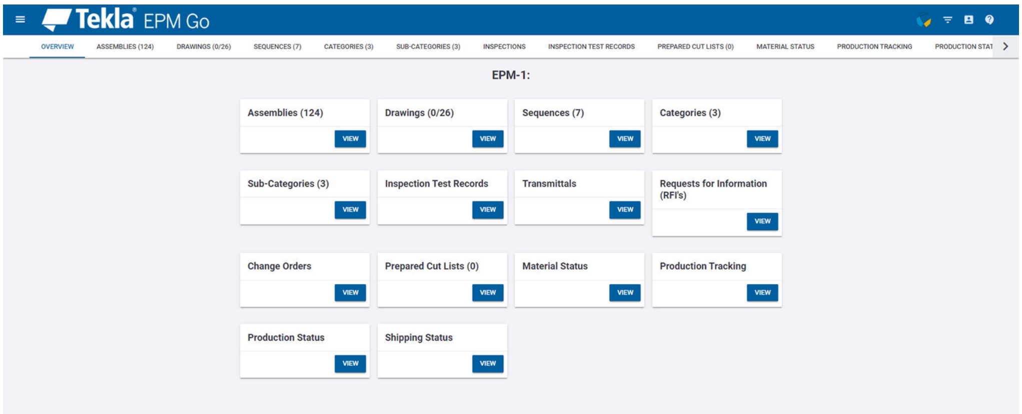
2. Do one of the following:
   - To clear one filter, tap **Clear** below the filter that you want to clear.
   - To clear all filters, tap **Remove Filters**.

Find and view assemblies

You can view assemblies, their properties, and the items within the assemblies in Tekla EPM Go. If the job has been linked to Trimble Connect and an IFC model has been attached to the Trimble Connect project, you can also view the assembly in the IFC model.

1. On the homepage, scroll to the job whose assemblies you want to view.
2. Tap **Open Project**.

   The job information view opens.

3. Do any of the following:
   - At the top of the page, tap **Assemblies**.
   - In the **Assemblies** section, tap **View**.

   The assemblies in the current job are shown.
4. To find the assembly that you want to view, do any of the following:
   - Scroll to find the assembly.
   - Type the main mark number in the **Find Assembly** field.
   - Set a filter that only shows the desired assemblies.

     For more information on filters, see Set and clear filters (page 15).
5. To view the details of the assembly, do any of the following:
   - To view the properties of the assembly, tap the number in the **Main Mark** column.
   - To view the assembly and the items that belong to it, tap the icon.

- To view the assembly in the attached IFC model using Trimble Connect, tap the icon.

  Note that if the job is not connected to a Trimble Connect project, the icon is not visible.
- View the number of inspection tests completed on assemblies in the inspection test columns.

  The names of the columns depend on the inspection tests that have been performed. If no inspection tests have been completed for the assemblies, no inspection test columns is not visible.

6. To view all assemblies again, tap the **Filters** icon ( ) in the upper-right corner, and tap **Clear**.

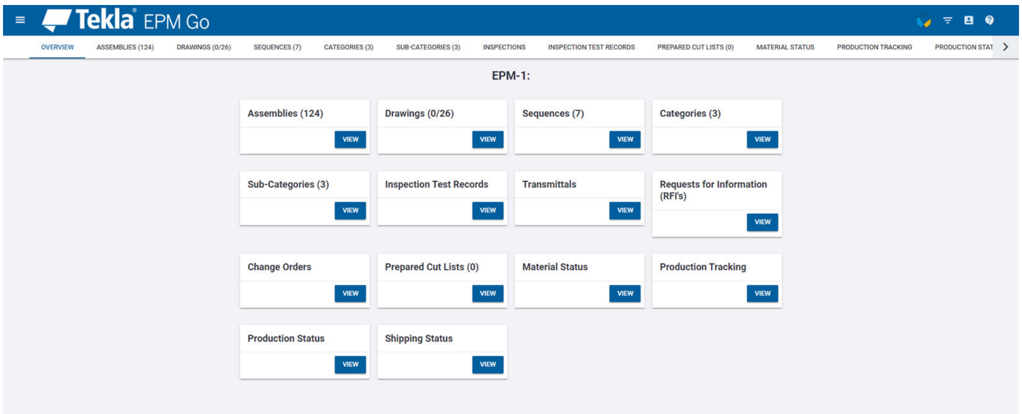
View and manage drawings

You can view and manage the drawings added to a job in Tekla EPM Go. You can also manage drawing logs, filter drawings, and modify drawing properties and revisions.

To start managing drawings:

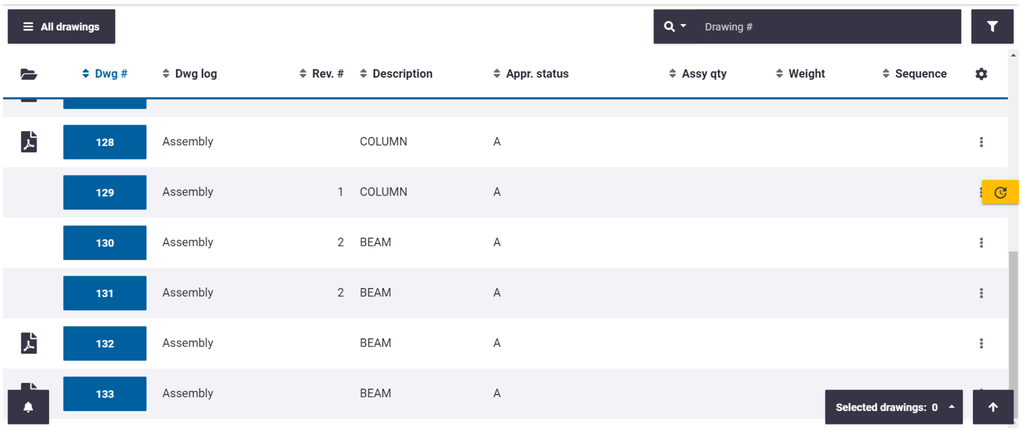
1. On the Tekla EPM Go homepage, scroll to the job whose drawings you want to view.
2. Tap **Open Project**.

   The job information view opens.

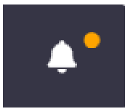


3. Do any of the following:
   - At the top of the page, tap **Drawings**.
   - In the **Drawings** section, tap **View**.

The drawing list opens and displays all drawings in the current job.



Note that:

- Tapping the  **Switch** button on the right side of the drawing list allows you to switch between the drawing list view and the old drawing view. However, these instructions have been written for the drawing list view.
- Tapping the  **Notifications** button in the lower-left corner of the drawing list view shows all changes made to drawings in any project by any user. A yellow dot is shown on the **Notifications** button whenever new changes have been made.

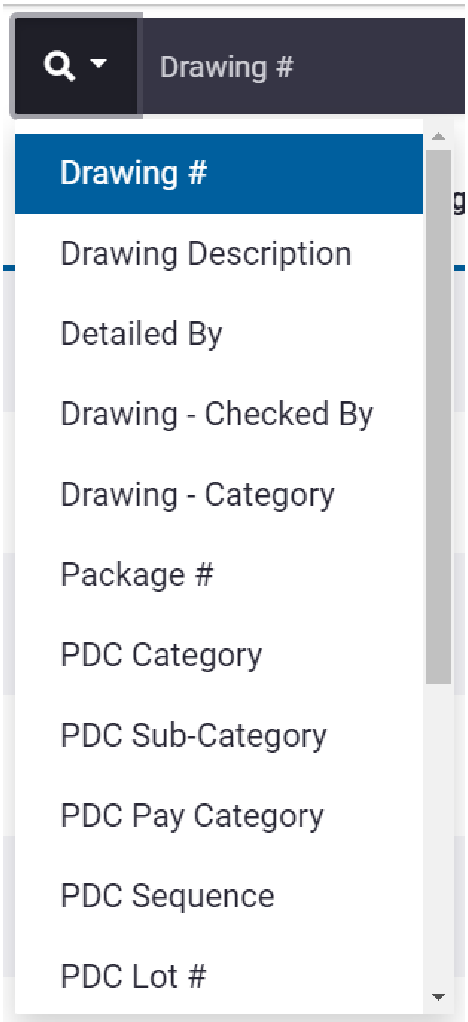
  You can clear the notifications one by one by tapping **X** next to each notification, or clear all notifications at once by tapping **Clear all notifications**.

Filter and search for drawings

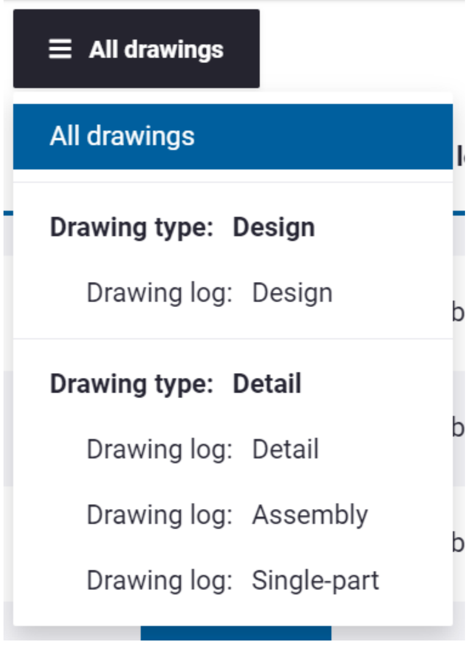
- Do any of the following:

To	Do this
Search for a drawing	1. In the upper-right corner of the drawing list, type the search term in the search field.  Note that the current search criterion is shown in the search field. The default search criterion is drawing number.

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>The drawing list is updated to only show drawings that match the search term.

To show all drawings again, tap X on the right side of the search field.</td></tr>
<tr><td>Change search criteria for drawing</td><td>1. In the upper-right corner of the drawing list, tap the arrow on the right side of the search icon.


2. Select a search criterion in the list.</td></tr>
<tr><td>Show only drawings with a particular drawing type in a particular drawing log</td><td>1. In the upper-left corner of the drawing list, tap .</td></tr>
</table>

To	Do this
	 2. In the menu, select the drawing type, or the drawing log whose drawings you want to show. The drawing list view is updated to match your selection.
Set a filter for drawings	1. In the upper-right corner of the drawing list, tap the **Filter** button. 2. In the **Select field** list, select the field that you want to use for filtering. 3. Type the desired value in the selected field. Repeat steps 2 to 3 to set all necessary filters. 4. To apply the filter settings, tap **Apply settings**. The drawing list view is updated to match your filters.

Customize the columns shown in the drawing list

1. Tap **Settings** in the upper-right corner of the drawing list.

2. Select **Field settings**.
3. In the **Field settings** dialog box, select the check boxes that represent the columns that you want to see in the drawing list.
4. To re-arrange the columns, scroll down in the **Field settings** dialog box, and drag and drop the columns to a new order.
5. Tap **Apply settings**.

View and download an attached drawing file

1. Find the drawing whose attached file you want to view.

   If a drawing file has been added for the drawing, you can see the file icon in the column.

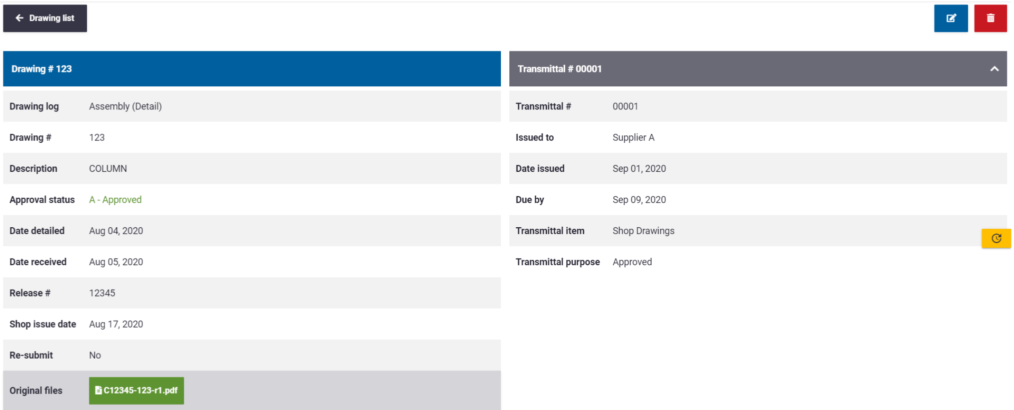
   Note that the Tekla EPM Go site uses the settings defined on the Tekla EPM server to search for the drawings in the **Drawing** default folder. The path to the **Drawing** default folder is set in the Tekla EPM desktop application. If the default folder is not set properly, or if there are no drawing files, the column is not visible.
2. In the column, tap the drawing file to open it.

The drawing file is downloaded onto your device.

In order to view the drawing file, you need to have an appropriate application for opening drawing files on your device. For example, a PDF reader is needed for opening attached PDF files.

Modify the properties and revisions of an individual drawing

1. Find the drawing whose properties you want to modify.
2. To open the drawing information view, tap the drawing number in the **Dwg #** column.



You can see the drawing information, such as the drawing log where the drawing is stored, the approval status, and the transmittals to which the drawing has been attached.

3. To modify the drawing properties and revisions, tap .
4. Do any of the following:

To	Do this
Modify the drawing properties	a. On the left side of the drawing information view, type or select new values for any drawing properties. b. Tap **Update**.
Add drawing revisions	a. On the right side of the drawing information view, tap **+ Add new revision**. b. Type a number for the revision. c. Type and select the remaining revision information using the available fields and lists. d. Tap **Add revision**.
Modify drawing revisions	a. On the right side of the drawing information view, select a revision. b. Type or select new values using the available fields and lists. c. To save the changes, tap **Update**.
Delete drawing revisions	a. On the right side of the drawing information view, select the revision that you want to delete.

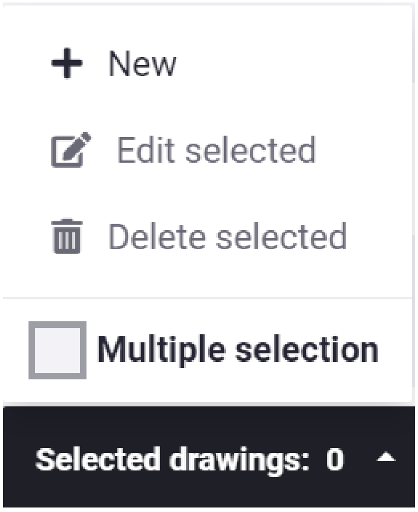
To	Do this
	b. Below the revision information, tap **Delete**. c. To confirm deleting the revision, tap **Yes, delete**.

A green message appears, informing you that the changes have been made successfully.

To return to the drawing list view, tap **Drawing list** in the upper-left corner of the drawing information view.

Modify the properties of multiple drawings

1. Tap the list in the lower-right corner of the drawing list.



2. Select **Multiple selection**.
3. Tap the drawings whose properties you want to modify.

   The list in the lower-right corner shows the number of selected drawings.
4. Tap the list in the lower-right corner, and select **Edit selected**.
5. In the **Edit selected drawings** dialog box, do any of the following:

To	Do this
Modify the drawing properties	a. On the **Drawing details** tab, type or select new values for the available properties. b. Tap **Save**.
Add revisions for the selected drawings	a. On the **Add revisions** tab, select one of the following:

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>Auto-assign assigns the next available revision numbers for the new revisions automatically.
Revision # allows you to enter the revision number manually.

If you select this option, type the revision number in the Revision # field.
b. Type and select other necessary revision information in the available fields and lists.

c. Tap Save.</td></tr>
<tr><td>Modify the revisions of the selected drawings</td><td>a. On the Edit revisions tab, select one of the following:
Latest updates the changes to the latest revisions.
Revision # allows you to select which revisions you want to modify.

If you select this option, type the revision number in the Revision # field.
b. Select the check boxes next to the revision properties that you want to modify.

c. Modify the revision properties according to your needs.

d. Tap Save.</td></tr>
<tr><td>Delete revisions from the selected drawings</td><td>a. On the Delete revisions tab, select one of the following:
Latest deletes the latest revisions.
Revision # allows you to select which revisions you want to delete.

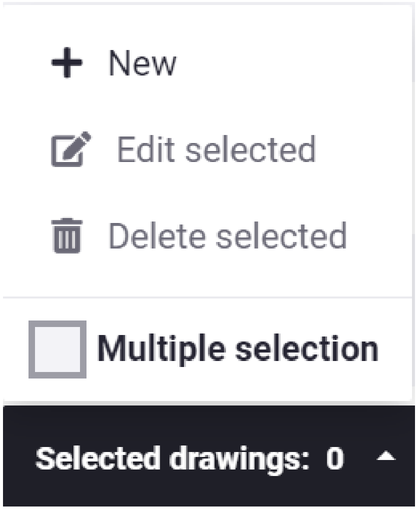
If you select this option, type the revision number in the Revision # field.
b. Tap Delete.</td></tr>
</table>

To	Do this
	c. To confirm deleting the revisions, tap **Yes, delete**.

A green message appears, informing you that the changes have been made successfully.

Delete multiple drawings

1. Tap the list in the lower-right corner of the drawing list.



2. To delete multiple drawings, select **Multiple selection**.
3. Tap the drawings that you want to delete.

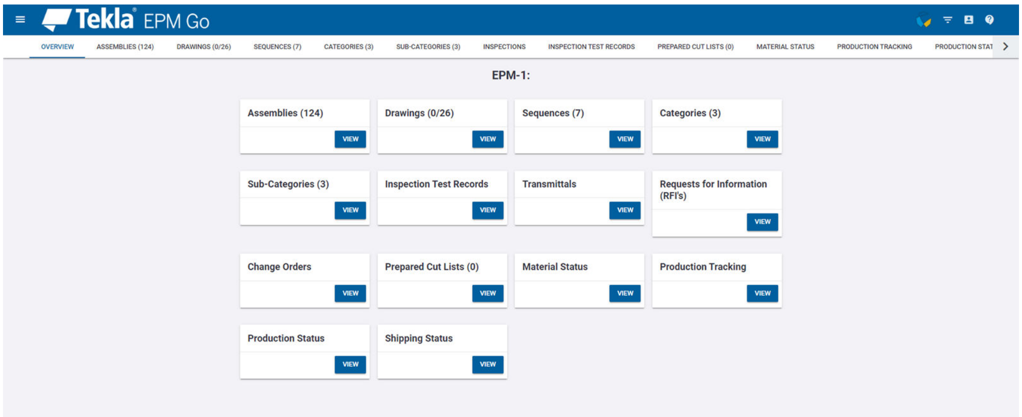
   The list in the lower-right corner shows the number of selected drawings.
4. Tap the list in the lower-right corner, and select **Delete selected**.
5. To confirm deleting the selected drawings, tap **Yes, delete all**.

View sequences

You can view the list of sequences in a job in the Tekla EPM Go. The list shows the number of assemblies and items in the sequence, the weight of he sequence, and the number of inspected items in the sequence.

1. On the homepage, scroll to the job whose sequences you want to view.
2. Tap **Open Project**.

The job information view opens.



NOTE If the job does not have multiple sequences applied to it, all material items within the job are considered a single sequence. In this case, the **Sequences** and **Lots** tabs and the **Sequences** and **Lots** sections are not visible in the job information view.

3. Do one of the following:
   - At the top of the page, tap **Sequences**.
   - In the **Sequences** section, tap **View**.

The sequences that match the currently set filters are displayed.

The **Sequence** column shows the name of the sequence. Clicking the button in the **Sequence** column sets the selected sequence as a filter for the job information. To modify the filters, see Set and clear filters (page 15).

The **Assy Qty** column shows the number of assemblies in the sequence.

The **Total Qty** column shows the total number of items in the sequence.

The **Weight** column shows the total weight of the items in the sequence.

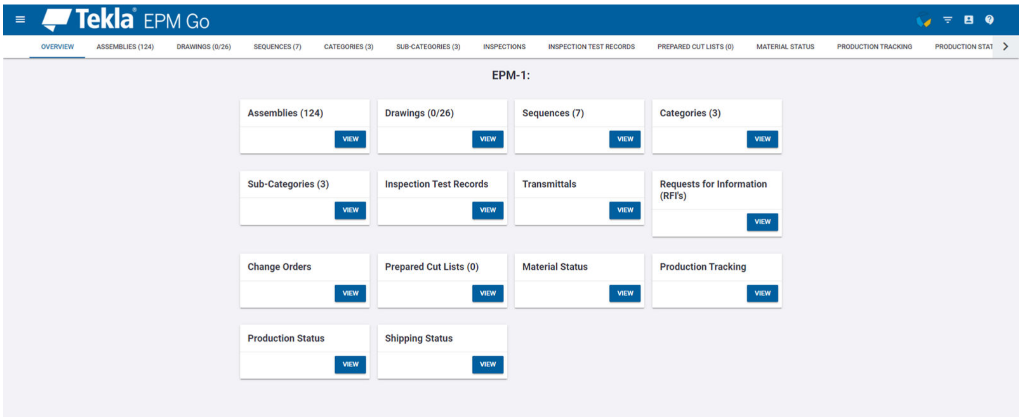
The different inspection columns shows the number of inspected items in the sequence.

View inspection test records

You can view the inspection test records added for a job in Tekla EPM Go. You can also view the details of the records and any PDF files attached to the records.

1. On the homepage, scroll to the job whose inspection test records you want to view.
2. Tap **Open Project**.

The job information view opens.



3. Do one of the following:
   - At the top of the page, tap **Inspection Test Records**.
   - In the **Inspection Test Records** section, tap **View**.

   A summary of the records for the completed inspection tests are shown.

   The **Test Results** column shows the percentage of failed test records.

   Note that only test records that match the currently set filters are shown. To modify the filters, see Set and clear filters (page 15).

4. To view individual records, scroll to find the desired test, and tap the magnifying glass () in the **View** column.

The individual inspection test records are shown. Do any of the following according to your needs:

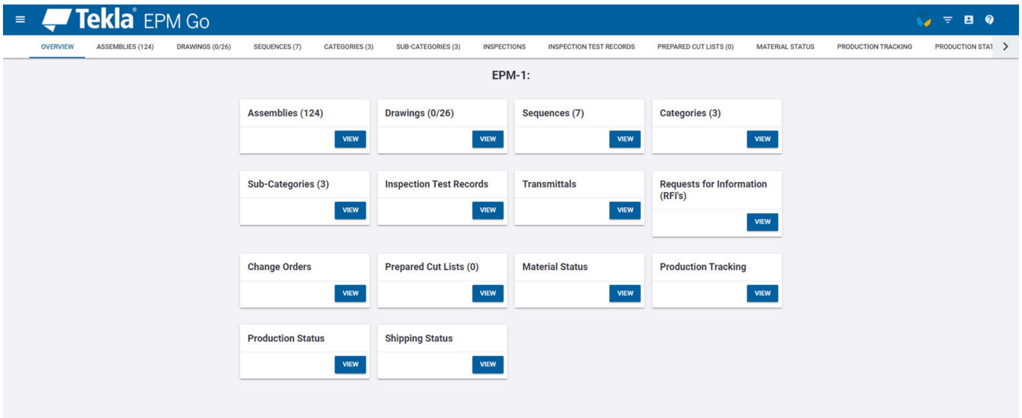
- To show the values in the inspection test fields, click the **Show Field Details** button. To hide the field values again, click the **Hide Field Details** button.
- To view and modify the details of an individual record, create a report of the record, or delete the record, click the button in the **Rec #** column.
- If a PDF file has been attached to the record, you can view the file.

Add job-specific inspection test records

You can add inspection test records, or testing information for a job, in Tekla EPM Go. You can add records to the initial test, and attach re-test record PDF files or other record PDF files to the test records.

1. On the homepage, scroll to the job to which you want to add inspection records.
2. Tap **Open Project**.

The job information view opens.

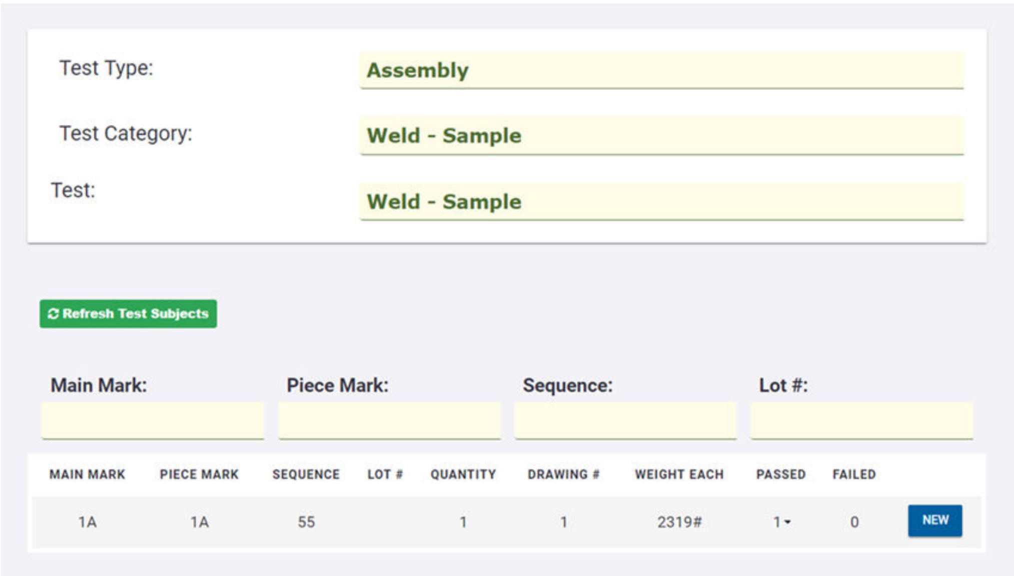


3. At the top of the page, tap **Inspections**.
4. Tap the available lists to select the test type, test category, and test that you want to run.

   The test types, categories, and test names need to be created in the Tekla EPM desktop application.

   Note that if you have not yet set a filter, you need to set one to proceed. For more information on setting filters, see Set and clear filters (page 15).

   After you have selected the test type, category, and test and set a filter, you can see the inspection test records in the current job that match the filter.



5. Do any of the following:

To	Do this
Add a new test record	a. Tap **New** on the right side of a test record.

To	Do this
	b. Tap the **Create as a follow-up to the failed test record #** list and select the **None, add as new test record** option.
Add a follow-up test record	Adding a follow-up test record allows you to change the test status from failed to passed without losing the original failed test record. a. Scroll to find a failed test record and tap the arrow in the **Failed** column. b. Tap the green record number. c. Tap the **Run Follow-up Test** at the bottom of the inspection test record view.

6. Do one of the following:
   - Tap the lists to select the inspection location and inspector. Then, define the test hours, and add any other information in the available fields.

     The available and mandatory fields are set in the inspection test properties in the Tekla EPM desktop application.
   - To use the properties of the latest record, tap **Restore last**.

     Note that the **Restore last** option is only available if you have added another record with the same test category in the same job right before adding the current record.
7. To attach a file to the record, do the following:
   a. Tap **ADD FILE**.
   b. Browse to find the file that you want to attach and select it.
   c. Tap **Open**.
   d. Type a description for the file.

   To add more files, repeat steps a to d.
8. When you are ready to submit the record, tap **Submit Now** or **Submit**.
9. Tap **Confirm!**

The inspection test record is added.

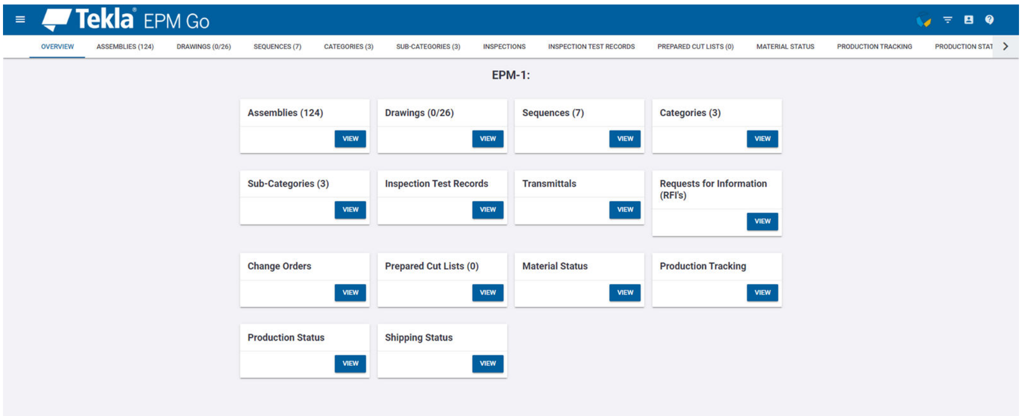
View cut lists and process items

In Tekla EPM Go, you can both view the cut lists saved for a job in Tekla EPM , and cut the items that have not yet been processed.

1. On the homepage, scroll to the job whose cut lists you want to view and modify.

2. Tap **Open Project**.

   The job information view opens.



3. Do any of the following:

   - At the top of the page, tap **Prepared Cut Lists**.
   - In the **Prepared Cut Lists** section, tap **Prepared Cut Lists**.

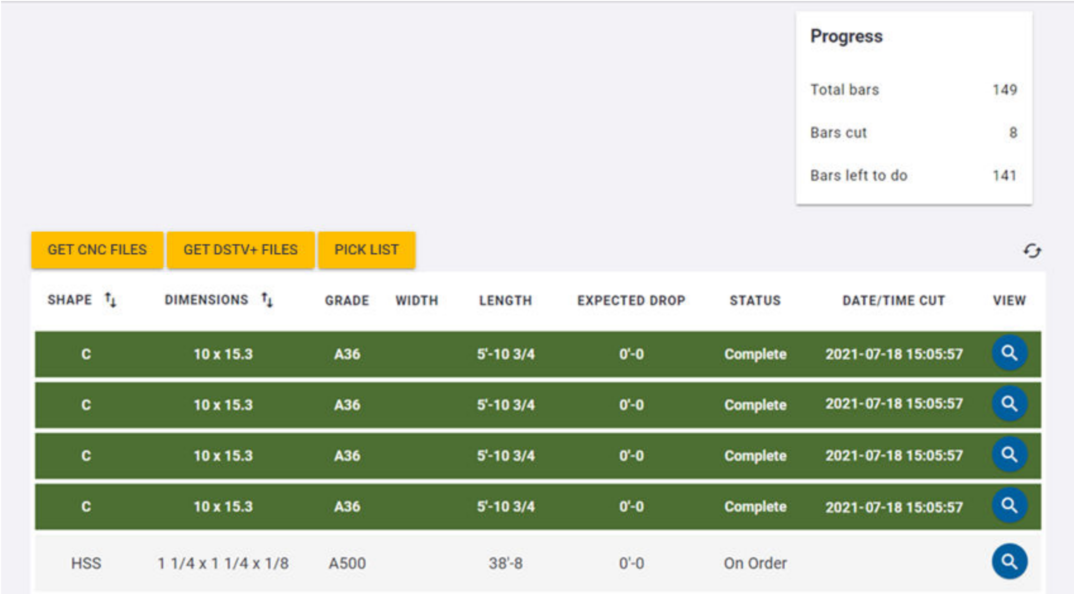
   The cut lists that match the current filters are shown.

   Note that only cut lists that have been saved for the current job in Tekla EPM desktop application are shown.

   The **Invalidated** column shows the number of items whose cutting pattern has changed. Any items that have `0` in the **Invalidated** column can be cut.

   If the desired cut lists are not shown, tap the **Filters** button ( ) in the upper-right corner and set the filters so that you can see the desired items. For more information on filters, see Set and clear filters (page 15).

4. To view the details of a particular cut list, tap the cut list name in the **Title** column.



The cut list view opens, showing all the items in the cut list. The items on a green background have already been cut, whereas the items on a gray background have not yet been cut.

If necessary, you can view the list of material items that need to be cut by tapping **Pick List**.

If CNC files have been attached to cut list items, a **CNC files** button is shown on the right side of the **Pick List** button. By clicking the **CNC files** button, you can download a .zip package that contains all CNC files added for the items in the cut list.

Cut items

Note that items that are on order and have not yet been received cannot be cut.

1. In the **View** column of an uncut item, tap the  button.
2. Tap the **Process** button.

   The details of the cut list are shown.
3. Modify the quantity of pieces to be cut, the drop length, and the inventory locations according to your needs.
4. If necessary, tap the **Drop must be reserved for project** list and select the job for which you want to reserve the drop material.

   Depending on the company standard settings set by your administrator, you might or might not be able to select another job in the **Drop must be reserved for project** list.

5. Tap **Cut it!**
6. To confirm cutting the item, tap **Confirm!**

When the item is cut, the background of the item turns green in the cut list view. The status and cutting date and time are updated.

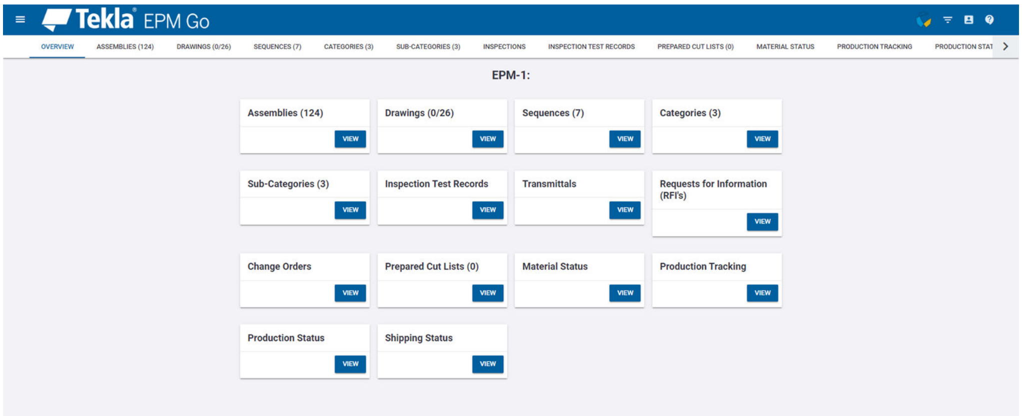
You can continue cutting other items according to your needs.

View material statuses

You can view the material statuses of items in Tekla EPM Go. You can also view further details about the items that have been taken from stock and cut.

1. On the homepage, scroll to the job whose material statuses you want to view.
2. Tap **Open Project**.

   The job information view opens.

3. Do any of the following:
   - At the top of the page, tap **Material Status**.
   - In the **Material Status** section, tap **View**.

   The material statuses of items in the current job are shown.

   You can view the quantity and weight of items that are:
   - taken from stock
   - in stock
   - on a purchase order
   - on a requisition
   - not allocated (have not yet been sent to **Purchasing**)

   You can filter the material status information according to your needs. For more information, see Set and clear filters (page 15).

4. To view further details about materials that have been taken from stock and cut, tap the button on the left side of **TFS**.

See also

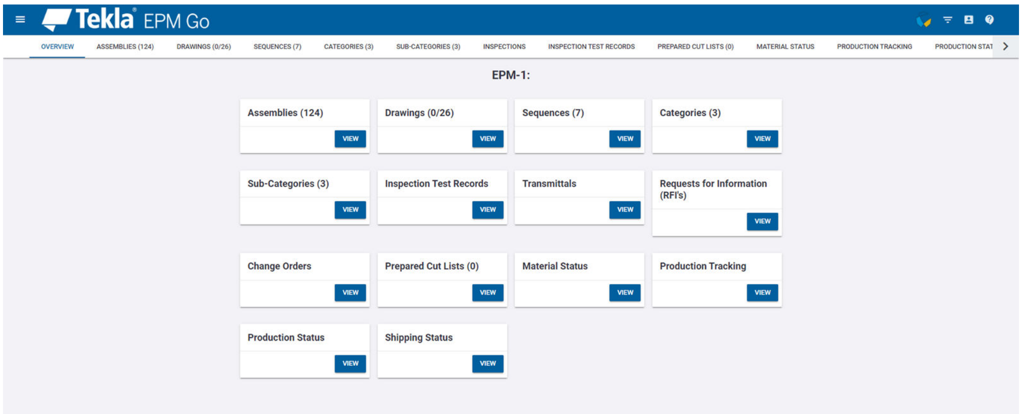
View cut lists and process items (page 30)

View production statuses

You can view the production statuses of items in the currently selected job. You can also adjust the details that are shown in the production status view, so that you can focus on the item details that are relevant to you.

1. On the homepage, scroll to the job whose material statuses you want to view.
2. Tap **Open Project**.

   The job information view opens.

3. Do any of the following:
   - At the top of the page, tap **Production Status**.
   - In the **Production Status** section, tap **View**.

   The production statuses of items in the current job are shown.

   By default, the production status view shows the sequence, main mark, overall production status, and overall shipping status of items.

4. To change the details that are shown, tap at the upper-right corner.
5. In the **Summary Fields** section, select check boxes next to the details that you want to show.

For example, you can show the shipping route of the items or the status of the items on individual production stations. If the selected details are not applicable to some of the items, those items will be hidden.

You can also select if you want to show or hide accessory items without piece tracking or load tracking information. To show these accessory items, clear the **Exclude Accessories without Piece/Load Tracking** check box.

6. Tap **Submit**.

The production status view updates to show the details that you selected.

You can also tap ⟳ at the upper-right corner to refresh the currently shown production status information.

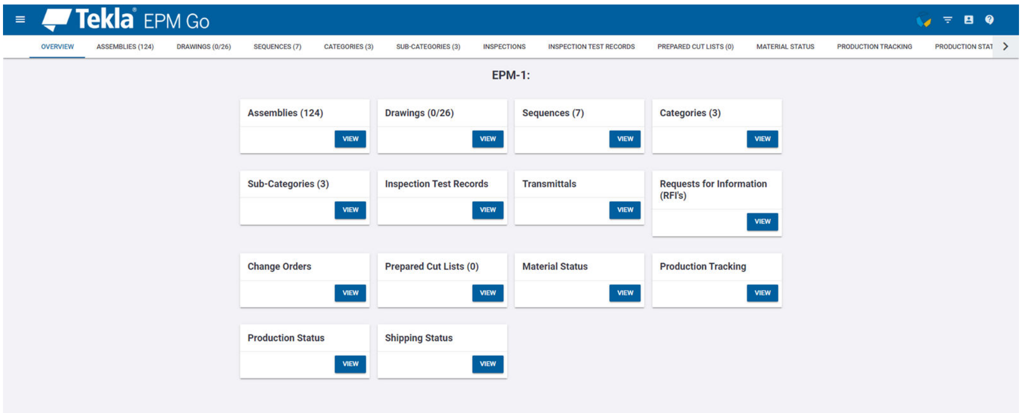
View item categories and sub-categories

You can view the categories and sub-categories of items in the job in Tekla EPM Go. Categories are keywords that you can use to sort items. For example, categories can be based on material types. Sub-categories are used to further sort the items within a category.

Note that to view the categories and sub-categories in a job, the job has to use categories and sub-categories.

1. On the homepage, scroll to the job whose categories or sub-categories you want to view.
2. Tap **Open Project**.

   The job information view opens.



NOTE If the job does not have multiple sequences applied to it, all material items within the job are considered a single sequence. In this case, the **Categories** and **Sub-Categories** tabs and the **Categories** and **Sub-Categories** sections are not visible in the job information view.

3. Do one of the following:
   - At the top of the page, tap **Categories** or **Sub-Categories**.
   - In the **Categories** box or the **Sub-Categories** box, tap **View**.

   The item categories or sub-categories in the job are displayed.

   The **Category** or **Sub-Category** column shows the name of the category or sub-category. Clicking the button in the **Category** or **Sub-Category** column sets the selected category or sub-category as a filter for the job information. To modify the filters, see Set and clear filters (page 15).

   The **Main Pc Quantity** column shows the number of main pieces in the category or sub-category.

   The **Total Qty** column shows the total number of items in the category or sub-category.

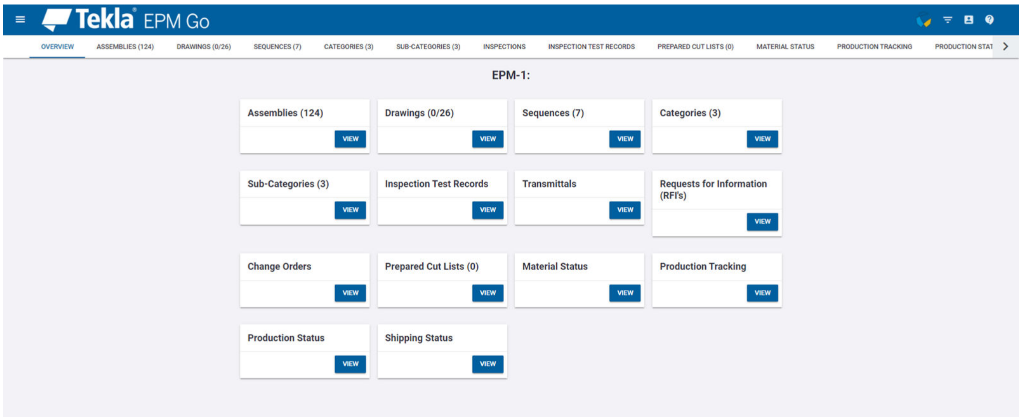
   The **Weight** column shows the total weight of the items in the category or sub-category.
4. To only view job information about the material items in a category or sub-category, tap the name of the desired category or sub-category.

View transmittals

On the **Transmittals** page, you can view and filter the list of sent transmittals related to a job, and show the details of individual transmittals.

1. On the homepage, scroll to the job whose transmittals you want to view.
2. Tap **Open Project**.

   The job information view opens.



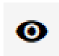
3. Do one of the following:
   - At the top of the page, tap **Transmittals**.

- In the **Transmittals** box, tap **View**.

  The total number of transmittals, the number of outstanding transmittals, and the number of overdue transmittals is shown at the top of the **Transmittals** page. The individual transmittals are listed below.

4. To find the transmittal that you want to view, do any of the following:
   - Scroll to find the transmittal.
   - Set a filter that only shows the desired transmittals.

     For more information on filters, see Set and clear filters (page 15).

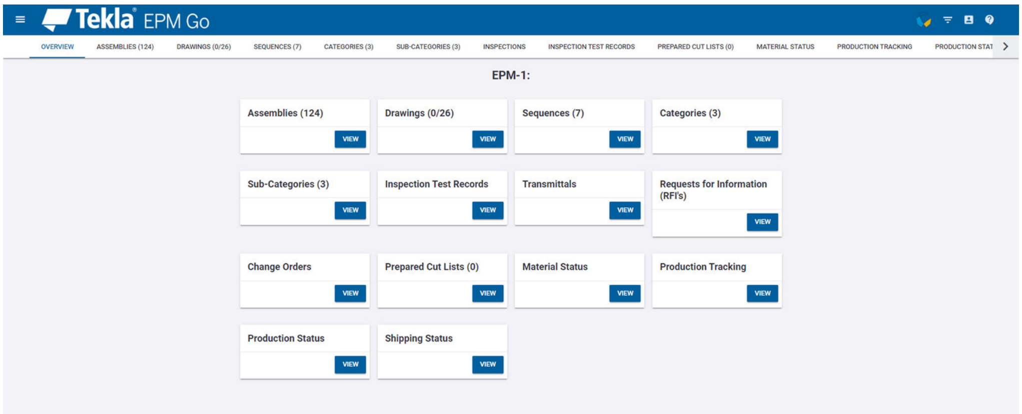
5. To view the details of a transmittal, click  on the right side of the transmittal.

View requests for information

On the **Requests for Information (RFI's)** page, you can view and filter the incoming and outgoing requests, and show the details or attachments of individual requests.

1. On the homepage, scroll to the job whose requests for information you want to view.
2. Tap **Open Project**.

   The job information view opens.

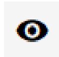


3. Do one of the following:
   - At the top of the page, tap **Requests for Information (RFI's)**.
   - In the **Requests for Information (RFI's)** box, tap **View**.
4. To find the request that you want to view, do any of the following:
   - Scroll to find the request.

- Set a filter that only shows the desired requests.

  For more information on filters, see Set and clear filters (page 15).

The total number of incoming and outgoing requests, the number of outstanding requests, and the number of overdue requests is shown at the top of the page. The individual requests are listed below.

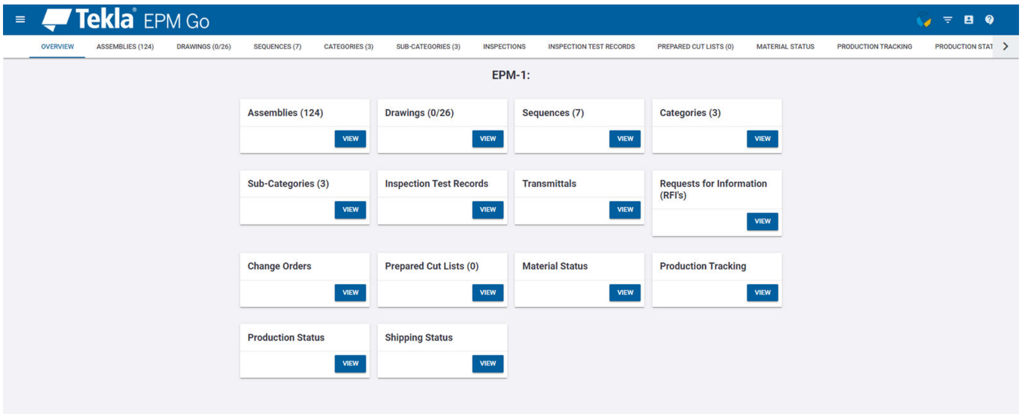
5. To view the details and attachments of a request, click  on the right side of the request.
6. To open an attached file, click the file name.

View change orders

On the **Change Orders** page, you can view and filter change orders, and show the details and attachments added for individual change orders.

1. On the home page, scroll to the job whose change orders you want to view.
2. Tap **Open Project**.

   The job information view opens.



3. Do one of the following:
   - At the top of the page, tap **Change Orders**.
   - In the **Change Orders** box, tap **View**.

   The total number of change orders, the number of outstanding change orders, and the number of overdue change orders is shown at the top of the page. The individual change orders are listed below.
4. To find the change order that you want to view, do any of the following:
   - Scroll to find the change order.
   - Set a filter that only shows the desired change orders.

     For more information on filters, see Set and clear filters (page 15).

5. To view the details and attachments of a change order, click on the right side of the change order.
6. To open an attached file, click the file name.

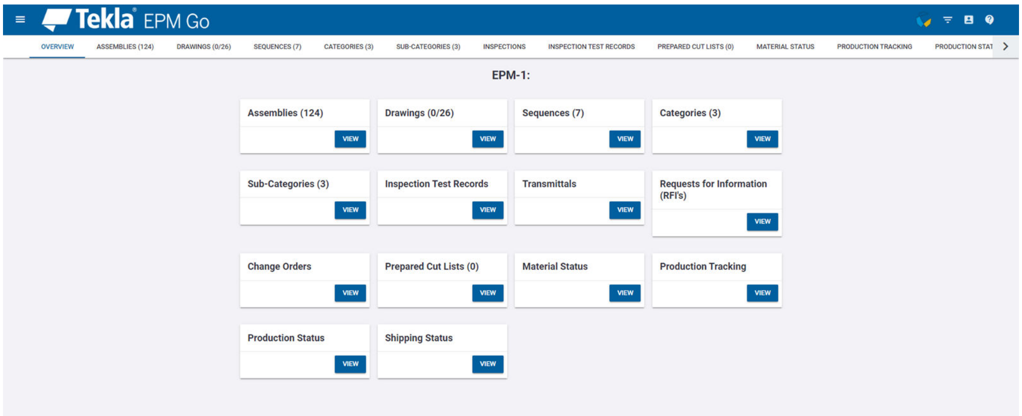
View and modify production tracking statuses

You can view the production statuses of items in production control jobs in Tekla EPM Go. You can also add new production tracking records for material items in the selected production control job, or delete incorrectly added items from existing records.

To view the production statuses, do the following:

1. On the homepage, scroll to the job whose production statuses you want to view or modify.
2. Tap **Open Project**.

   The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Production Tracking**.
   - In the **Production Tracking** section, tap **View**.

The list of stations in the selected job is shown. You can view the total number and weight of items that are required to complete the station, that have already completed the station, and that are still remaining and have not yet completed the station.

If you want to view further details about a station, you can tap the  button on the right side of the station.

Add a single production tracking record

1. Tap the **Add** button on the right side of the station to which you want to add a record.
2. Tap the **Main Mark** list and either select or type the main mark of the items that have completed the selected station.
3. Type the quantity of pieces that have completed the selected station.

   The gray number in the **Quantity** field shows the maximum number of items that can be processed.
4. If necessary, type the instance number in the available field.

   The gray number in the field shows the maximum number of items that can be processed.
5. If necessary, add the labor time in hours and minutes and the batch ID.

   The labor time added for the production tracking record can be viewed in the production schedule or project schedule, if necessary.

   The batch ID can be any identification associated with the item, such as the shift or work order number.
6. Tap the **Completed By** list and select the Tekla EPM user that has completed the item.
7. Tap **Add**.
8. To confirm adding the record, tap **Confirm**.

The quantity and weight of items that have completed the selected station is updated.

Add a batch of production tracking records

1. Tap the **Add Batch** button on the right side of the station to which you want to add a batch of records.

   You can see a list of the items that have not yet completed the station below the **Update All** section at the top of the page.

2. If necessary, set filters, so that only the items that you want to add to the record are shown.

   For example, you can filter the view so that only items with particular main marks are shown. For more information on filters, see Set and clear filters (page 15).

3. Do either of the following:

To	Do this
Enter the same information for all items	a. In the **Update All** section at the top of the page, tap the list and select the Tekla EPM user who has completed the item. b. To define the quantity of pieces that are added to the record, do any of the following: • To add the maximum quantities of all items in the record, tap the **Max Qty** button, and tap **OK**. • Type the desired quantity in the **Qty** field. If the quantity equals or is less than the quantity of pieces within an item, the item is highlighted with green. If the quantity exceeds the quantity of pieces within an item, the item is highlighted with red. c. If necessary, type the instance number in the available field. The gray number in the field shows the maximum number of items that can be processed. d. If necessary, type the labor time per piece in hours and minutes, and the batch ID in the available fields. The batch ID can be any identification associated with the item, such as the shift or work order number.
Modify items individually	a. In the list of the available items, tap the  button on the right side of the item that you want to modify. b. Type the desired quantity in the **Qty** field. The gray number in the **Qty** field shows the maximum number of items that can be processed.

To	Do this
	c. Tap the **Comp By** list and select the Tekla EPM user that has completed the item. d. If necessary, change the instance number. The gray number in the field shows the maximum number of items that can be processed. e. If necessary, modify the labor time per piece and the batch ID. The batch ID can be any identification associated with the item, such as the shift or work order number.

4. To save the record, tap **Update**.

Tekla EPM Go notifies you that the items have been successfully updated. After that, the updated items disappear from the view.

If necessary, clear the current filter and set a new one. For more information on filters, see Set and clear filters (page 15).

Delete items from a production tracking record

Deleting items from production tracking records is permanent and cannot be undone. The items that are deleted from the record are returned to the list of items that remain to be completed.

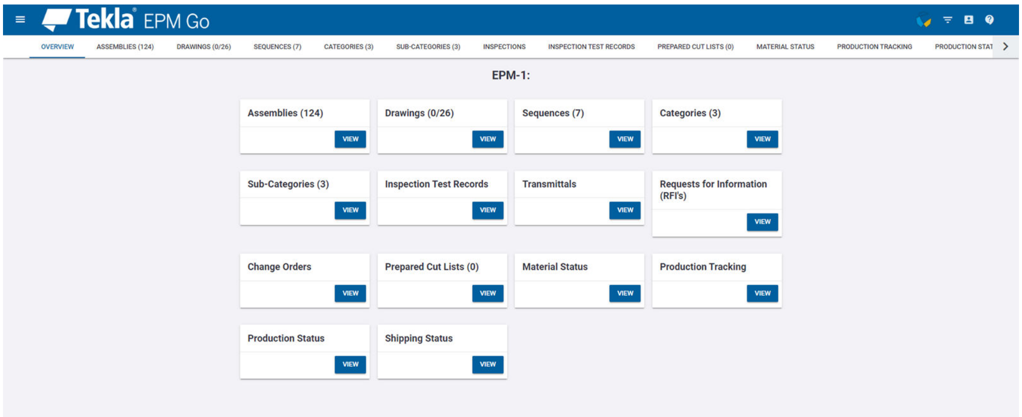
1. Tap the  button on the right side of the desired station.
2. Scroll to the record from which you want to delete items.
3. Tap the  button on the right side of the record.
4. Type the quantity of pieces that you want to delete from the record.
5. To permanently delete the pieces from the record, tap **Confirm**.

View and modify shipping information

In Tekla EPM Go, you can view the shipped and unshipped loads in a job, add loads, modify the material items on loads, create and view bill of lading reports, ship loads, and return shipped items.

1. On the homepage, scroll to the job whose shipping information you want to view and modify.
2. Tap **Open Project**.

The job information view opens.



3. Do any of the following:
   - At the top of the page, tap **Shipping Status**.
   - In the **Shipping Status** box, tap **View**.

   The shipping destinations in the current job are shown.

   You can see the quantity and weight of the items that are required to be shipped to the destination, the items that have already been shipped, and the items that remain to be shipped.
4. Scroll to find the destination whose loads you want to view and modify.
5. Tap the  button.

The loads that have been shipped to the current destination are shown.

To view loads that have not yet been shipped or that have been returned, tap the **Show unshipped loads** button. To hide these loads, tap the **Hide unshipped loads** button.

Add a load

1. Tap the **Show unshipped loads** button.
2. Tap the **Add** button.
3. Type the load number, trailer number, carrier, and load capacity.
4. If the load has an intermediate shipping location and needs to be returned to the jobsite, select the **To Be Returned** check box.
5. Tap **Add Load**.

6. Tap **Confirm**.

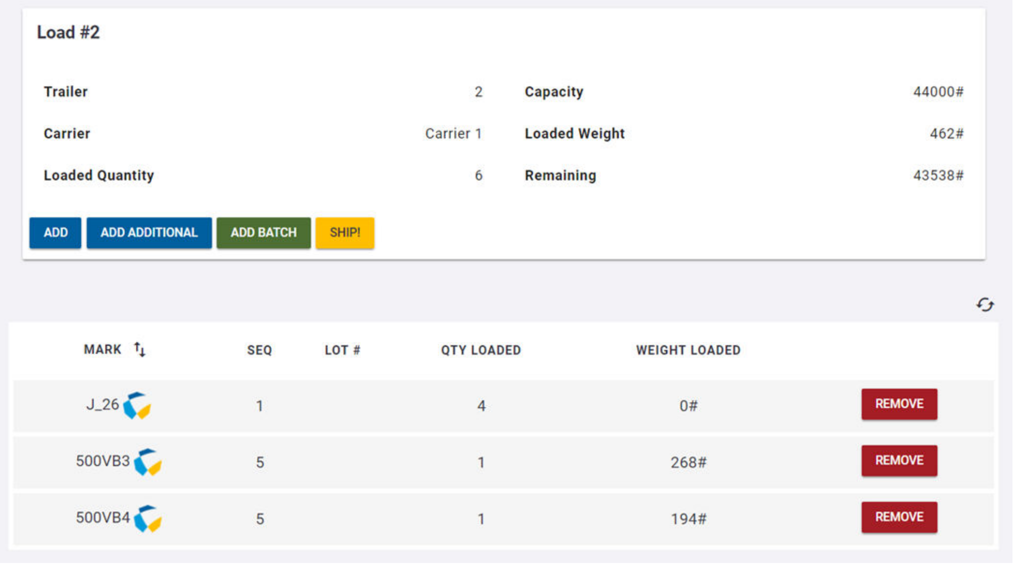
The load is added to the list of unshipped loads. You can now add material items to the load.

Add items to a load

1. In the list of unshipped loads, scroll to the load whose materials you want to modify.
2. Tap the **Material** button.

   The material items on the load are shown.

   Items can be pre-assigned to a load in the Tekla EPM desktop application. If items have been pre-assigned to the selected load, they are shown in the load view. You can easily load the pre-assigned items by clicking the **Load** button next to the items.



3. Do any of the following according to your needs:

To	Do this
Add a single item	a. Tap the **Add** button. b. Tap the **Main Mark** and **Sequence** lists to select the main mark and sequence of the item. c. Type the quantity of pieces that you want to add. d. Tap the **Add** button. e. Tap **Confirm**.

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td>Add a batch of items</td><td>
a. Tap the Add Batch button.

You can see a list of the items that can be added below the Update All section at the top of the page.

b. If necessary, set a filter that only shows the items that you want to add to the load.

For more information on filters, see Set and clear filters (page 15).

c. In the Update All section at the top of the page, do any of the following:

• To add the maximum quantities of all items on the load, tap the Max Qty button, and tap Confirm.

• Type the desired quantity in the Qty field.

d. Tap the Date Of Shipment field and modify the shipping date according to your needs.

e. To add the items to the load, tap Update.

The added items disappear from the list of items that can be added to the load.

Repeat steps a to e to add all necessary items to the load until the trailer is at its capacity. You can see the weight of the items on the load and the trailer capacity at the bottom of the Update All section.
</td></tr>
<tr><td>Add additional items</td><td>
Additional items can be any miscellaneous items without main marks, such as bolts.

a. Tap the Add Additional button.

b. Type the quantity of additional items, the weight per item and the description of the additional items.

c. If necessary, type any additional notes about the additional items.

d. Tap the Add button.
</td></tr>
</table>

Ship a load

You cannot ship a load that does not have any material items added to it.

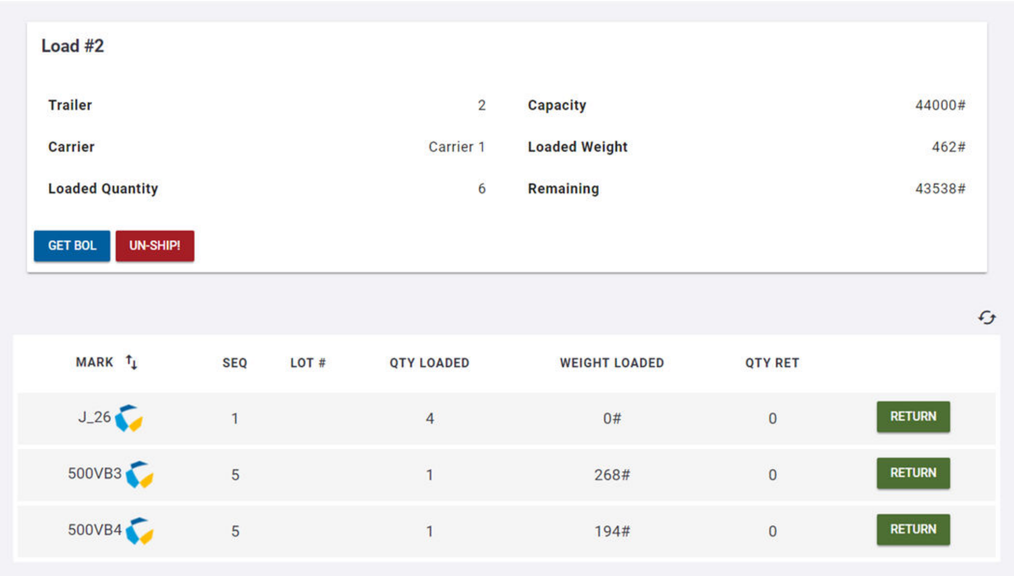
1. In the list of unshipped loads, scroll to find the load that you want to ship.
2. Tap **Ship!**

3. To ship the load, tap **Confirm**.

View or print the bill of lading

1. Scroll to find the shipped load whose bill of lading you want to view.
2. Tap the **Material** button.

   The materials on the load are shown.



3. Tap the **Get BOL** button.
4. Tap the **Report** list and select the report that you want to create.
5. According to your needs, select or clear the **Include cover sheet**, **Include notes**, and **Show logo** check boxes.
6. Tap **Make it!**

   A PDF version of the bill of lading report is downloaded onto your device.
7. Open the report to view or print it according to your needs.

Cancel shipping a load

If you need to modify a load that has already been marked as shipped, you can cancel shipping the load.

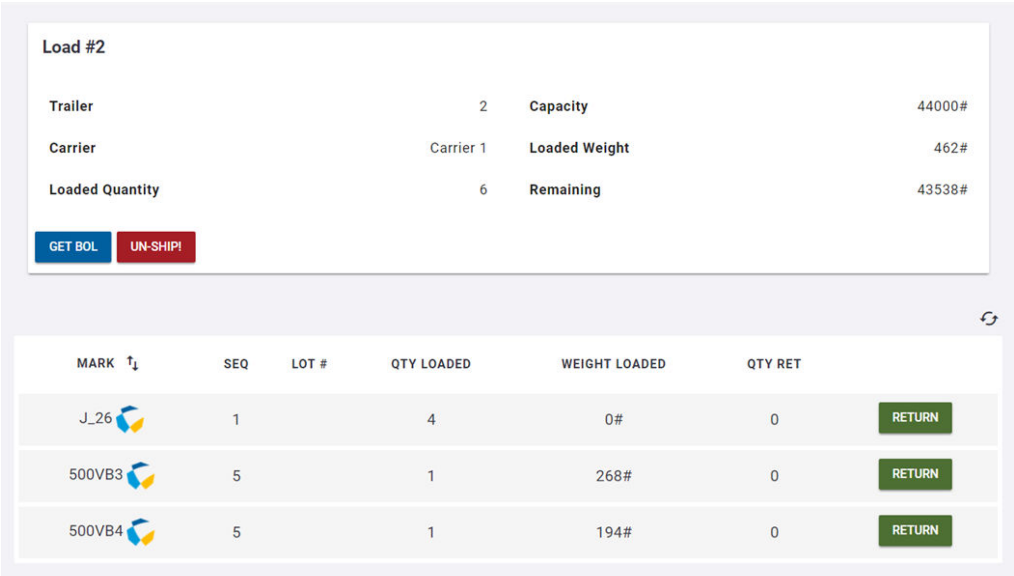
1. Scroll to find the load whose shipping you want to cancel.
2. Tap the **Un-Ship!** button.
3. To cancel shipping the load, tap **Confirm**.

Return shipped items

Use the **Return** command to return items that have been shipped to an intermediate destination and will later be added to another load. When you return the items, you can load the items on another load to with other items located in the shop.

1. Scroll to find the load on which you want to return items.
2. Tap the **Material** button.

   The materials on the load are shown.

3. Scroll to find the item that you want to return, or set a filter that only shows the desired items.

   For more information on setting filters, see Set and clear filters (page 15).
4. Tap the **Return** button.
5. In the **Quantity to Return** field, type the number of pieces that are returned.
6. Tap the **Return** button.
7. Tap **Confirm**.

The selected number of pieces can now be added to another load.

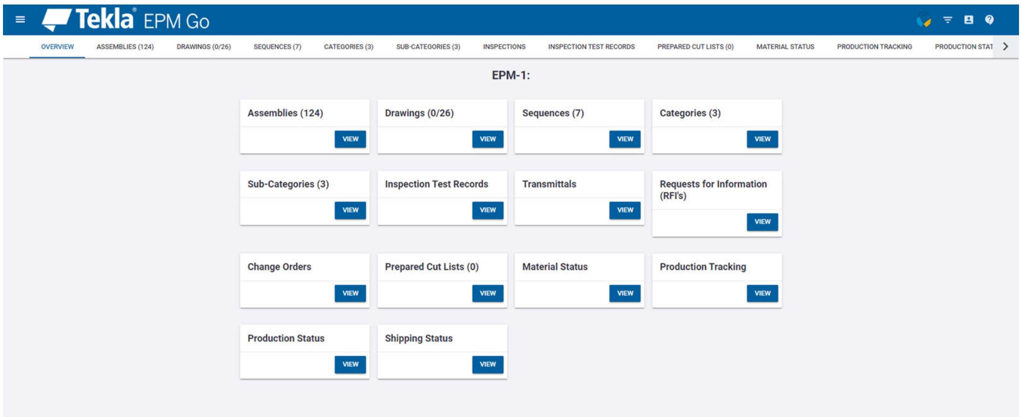
If you need to cancel returning an item, tap the **Un-Return** button and type the quantity of pieces whose returning you want to cancel.

View the project schedule of a job

You can view the current schedule of a project in Tekla EPM Go. Note that project schedules can only be modified in the Tekla EPM desktop application.

1. On the homepage, scroll to the job whose drawings you want to view.
2. Tap **Open Project**.

   The job information view opens.

3. Tap the file menu icon in the upper-left corner.
4. On the menu, select **Project**.

   The project schedule opens.
5. To change which information is viewed in the project schedule, do any of the following:
   - To change the scale with which the project schedule is viewed, select an option above the project schedule, and tap **Show it!** to update the project schedule.
   - To collapse or expand the tasks in the project schedule, in the **Rows** section, tap the available buttons to collapse or expand the rows.
   - To change which properties are shown in the project schedule, in the **Columns** section, select or clear check boxes next to the properties that you want to see or do not want to see.

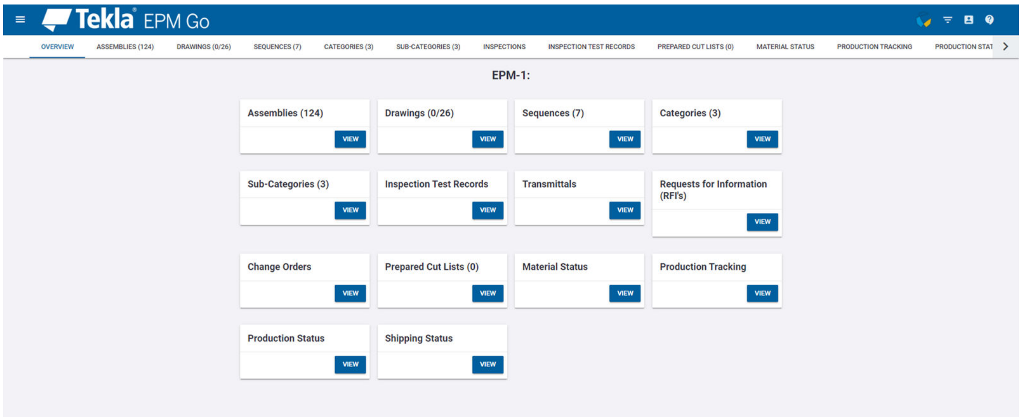
Visualize job information with Trimble Connect for Browser

You can use Trimble Connect for Browser with Tekla EPM Go to visualize your jobs as IFC models and interact with the models in several ways. For example, you can highlight and color-code items according to their production statuses, labor codes, or sequences.

To launch Trimble Connect for Browser from Tekla EPM Go:

1. On the homepage, scroll to the job whose assemblies you want to view.
2. Tap **Open Project**.

The job information view opens.



3. In the upper-right corner, click the Trimble Connect button .
4. On the **Projects** page, double-click the Trimble Connect project whose 3D model view you want to see.
5. To show the attached IFC models, open the model list and click the icon next to each model that you want to show.

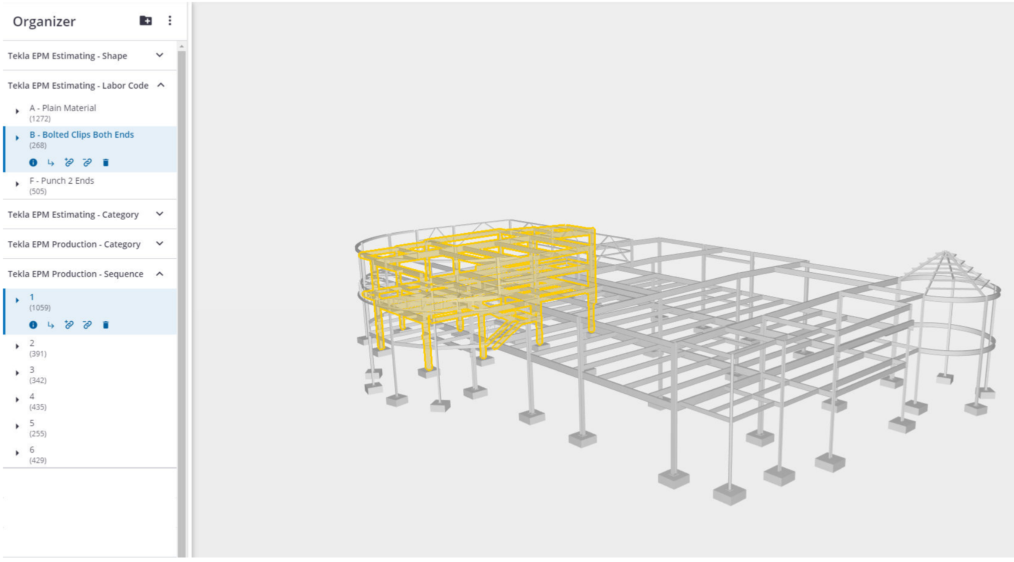
Highlight items with Trimble Connect Organizer

1. To open the Organizer side pane, click **Organizer** in the Trimble Connect side pane.

2. In the Organizer side pane, expand the necessary categories and select the categories whose items you want to highlight.

To select more than one category at a time, hold down **Ctrl** when selecting categories.

For example, you can select the labor code **B - Bolted Clips On Both Ends** and sequence **1** to highlight and zoom to all items with labor code B that belong to the production sequence 1.



Color-code items with Trimble Connect Content Browser

1. In the Trimble Connect side pane, click  **Data Table**.
2. To configure what information is shown in Content Browser:

   a. At the top of the Content Browser pane, click the  **Columns** button.

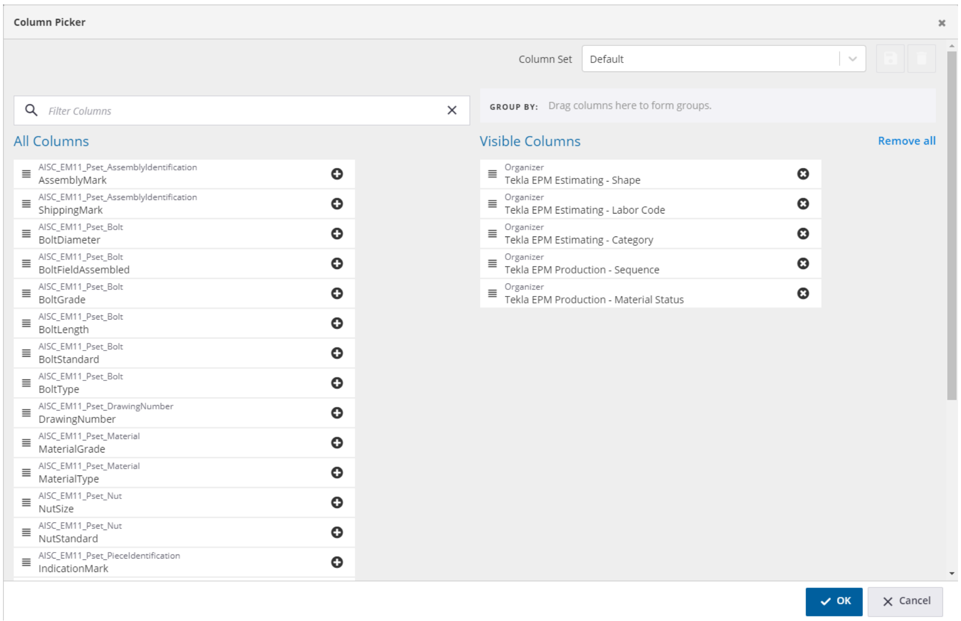
   b. If necessary, remove the current columns by clicking **Remove All** on the right side of the **Visible Columns** list.

   c. Find a column that you want to show in the Content Browser pane by scrolling the **All Columns** list, or by typing a search word in the **Filter Columns** field.

   d. Select the column.

   e. Hold down the left mouse button, drag the column to the **Visible Columns** list, and release the left mouse button.

Repeat steps c to e for all columns that you want to show.



f. To save your changes, click **OK** at the bottom of **Column Picker**.

3. To set how the items are grouped in the 3D model:

   a. Select a column in Content Browser and hold down the left mouse button.

   b. Drag the column to the **Group by** box, and release the left mouse button.

   The column name appears in the **Group by** box, and the objects are sorted according to the selected criterion. By default, groups and objects are shown in alphabetical order.

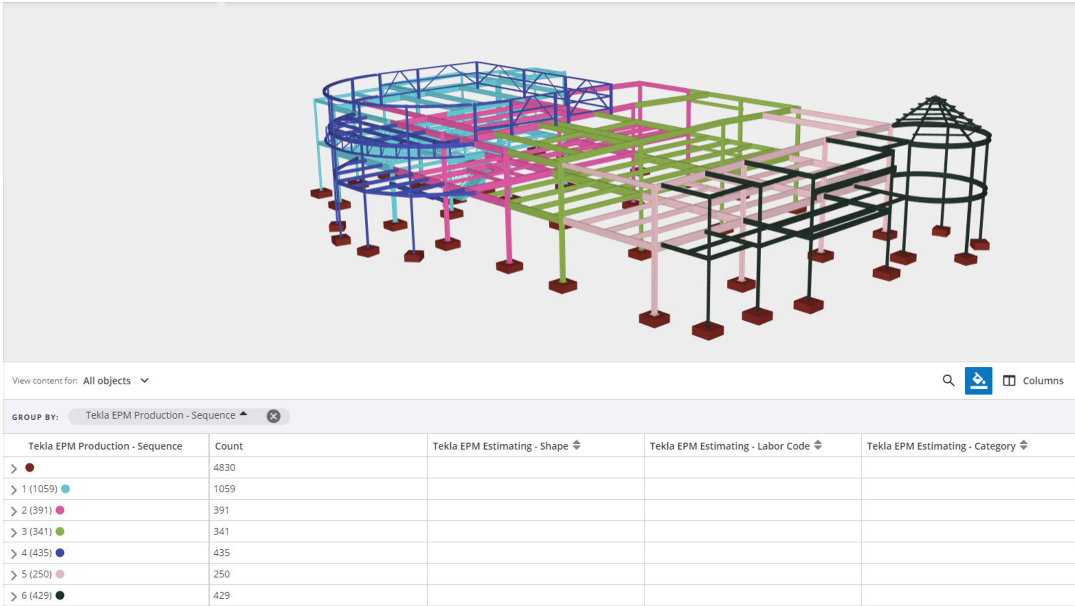
   You can also drag another column to the **Group by** box. In this case, the objects are sorted to both of the selected criteria.

If you want to reverse the order of the objects, click the column name in the **Group by** box.

4. To color-code the items in the 3D view, at the top of Content Browser, click **Colorize**.

The objects on all rows of Content Browser are color-coded in the 3D view. The color that is used for each row is shown on the right side of the row title.

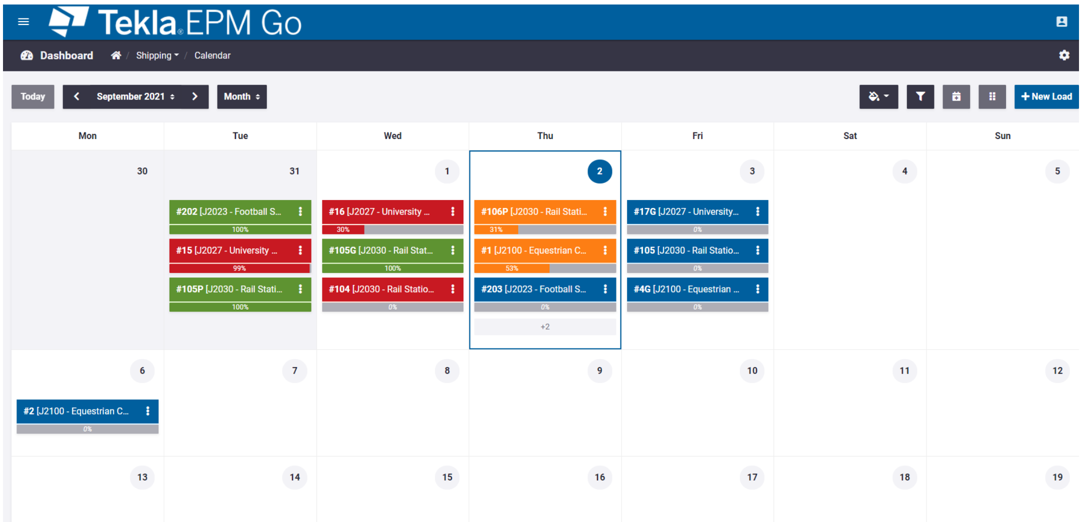
In the following image, you can see items grouped and color-coded by production sequence.



1.5 Plan and manage shipments

Use the shipping calendar to plan and organize your loads across all jobs. The shipping calendar shows your loads in a visual calendar view that lets you easily see what is scheduled to be shipped and when.

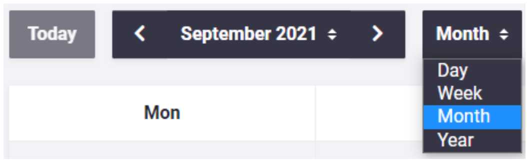
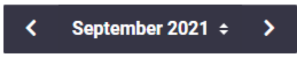
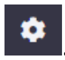
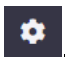
To open the shipping calendar, go to the Tekla EPM Go dashboard. Under **Shipping**, tap **Calendar**.

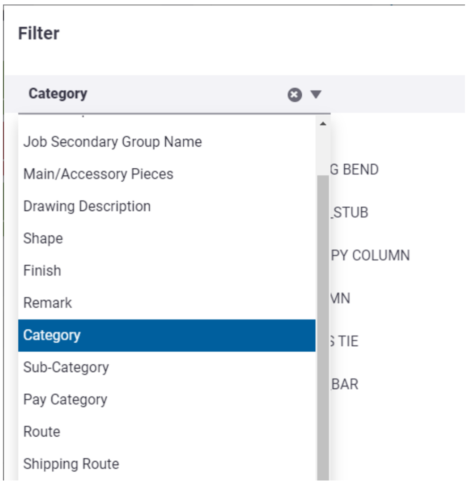


NOTE If users are unable to access the shipping calendar, ensure that they have been granted permission to the shipping dashboard. To change the permissions, tap **Remote Permissions**, select the **Shipping** check box, and then tap **Save Remote Permissions** to save the changes.

Change shipping calendar settings

You can adjust the calendar settings to fit your needs. You can change several view settings and set your preferred units of measure.

To	Do this
View the calendar by year, month, week, or day	• Use the list in the top-left corner of the window. 
Switch to the previous or next day/ week/month/year	• Scroll through the dates using the date picker. 
Set your preferred units of measure	1. Tap . 2. Select the units of measure that you want to use. 3. Tap **Apply** to save the changes.
Set the first day of the week	1. Tap . 2. Select the units of measure that you want to use. 3. Tap **Apply** to save the changes.
Set the first day of the week	1. Tap . 2. Select the desired start day of the week. 3. Tap **Apply** to save the changes.
Filter by job, destination, or status	1. Tap .

<table>
<tr><th>To</th><th>Do this</th></tr>
<tr><td></td><td>
2. Select the desired check boxes or select an option from the list of filters.


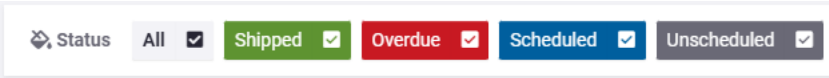
3. Tap **Apply** to save the changes.
</td></tr>
</table>

Change how loads are displayed

Loads are color-coded in the shipping calendar by their status, trailer, carrier, destination, or job. By default, the calendar is color-coded by the status.

1. To change the color-coding, tap  in the shipping calendar.
2. Select one of the options:
   - **Status**: (the default) Use this option to see the real-time progress and loading statuses.
   - **Trailer**: Use this option to see if a particular trailer has been double-booked, for example.
   - **Carrier**: If you are using third-party carriers, use this option to see which ones are being utilized for each load.
   - **Destination**: Use this option to see if you have loads from different jobs going to the same galvaniser, for example, to combine the shipments and reduce costs.
   - **Job**: Use this option to see all loads for a given job and to ensure that you are on schedule.
3. To see what each color represents, select the **Legend** check box.

The legend now appears above the calendar view:



See also

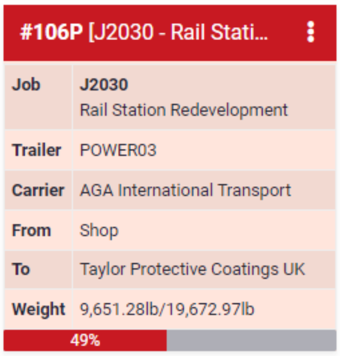
[Plan and manage shipments (page 53)]
Change shipping calendar settings (page 54)
View load details (page 56)
Create and manage loads (page 59)
Schedule, reschedule, and unschedule loads (page 60)
View the destination in Google Maps (page 61)
Export load lists (page 62)

View load details

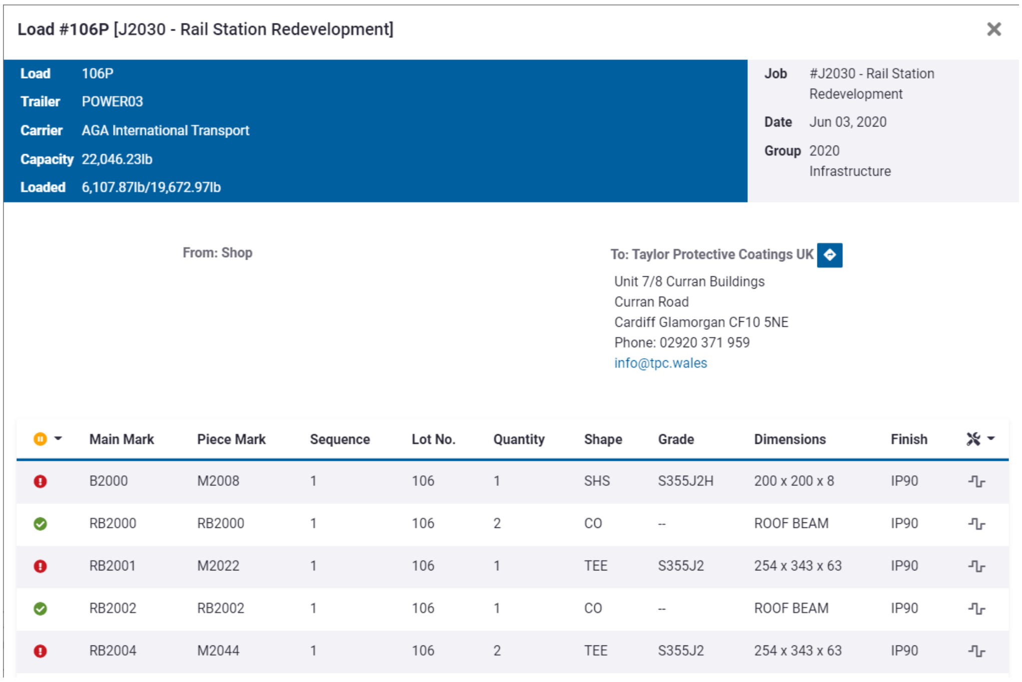
You can open any load in the calendar view to see more details, such as the individual assemblies assigned to the load and where exactly each assembly is within the fabrication workflow.

1. Tap the name of the load in the shipping calendar to expand the item.

   More details are shown, such as where the load is going to and the trailer and carrier being used.

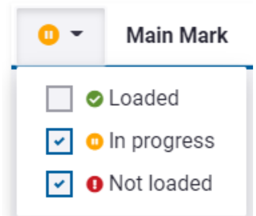
2. Tap the three dots next to the load name and select **Load details** to show all the individual assemblies assigned to the load.



	Main Mark	Piece Mark	Sequence	Lot No.	Quantity	Shape	Grade	Dimensions	Finish	
	B2000	M2008	1	106	1	SHS	S355J2H	200 x 200 x 8	IP90	
	RB2000	RB2000	1	106	2	CO	--	ROOF BEAM	IP90	
	RB2001	M2022	1	106	1	TEE	S355J2	254 x 343 x 63	IP90	
	RB2002	RB2002	1	106	1	CO	--	ROOF BEAM	IP90	
	RB2004	M2044	1	106	2	TEE	S355J2	254 x 343 x 63	IP90	

3. To define which assemblies are shown, tap the small arrow next to the list on the left.

   A list appears:

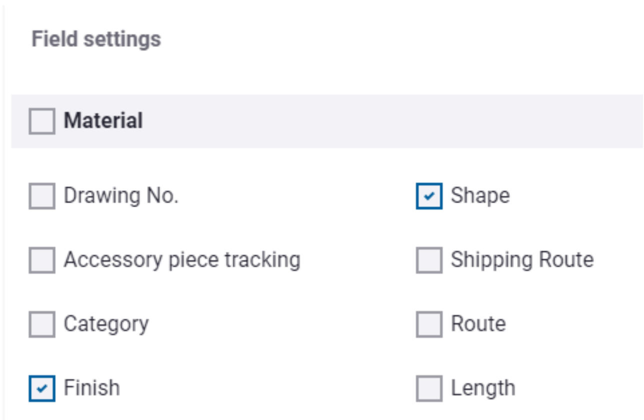
   For example, to include just the assemblies that still need to be loaded, clear the **Loaded** check box. Only the assemblies with the status of **In progress** or **Not loaded** will be shown.

4. To see exactly where each assembly is within the fabrication workflow, tap .

For example, we see that this assembly has not yet been fully inspected or painted:

5. To customize this page, tap  and then tap **Field settings**.

   a. Select and clear the checkboxes to define which data columns you want to see.

   b. If you wish, you can also change the order in which the columns should appear.

   c. Tap **Apply** to save the changes.

See also

Plan and manage shipments (page 53)

Change shipping calendar settings (page 54)

Change how loads are displayed (page 55)

Create and manage loads (page 59)

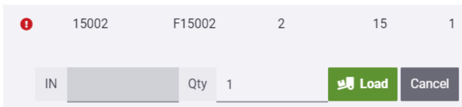
Schedule, reschedule, and unschedule loads (page 60)

View the destination in Google Maps (page 61)

Export load lists (page 62)

Create and manage loads

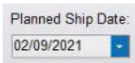
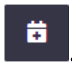
You can manage loads directly in the shipping calendar. When the assemblies are complete and loaded, you can also create bills of lading and mark loads as shipped.

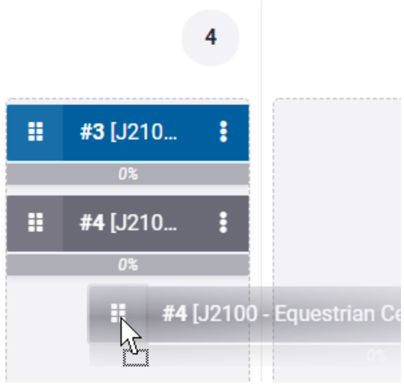
To	Do this
Create new loads	1. Tap the **New Load** button. 2. Enter the required details. 3. Tap the **Create load** button to save the changes.
Modify existing loads	1. Tap the three dots next to the load name and select **Edit**. 2. Make the required changes on the **Details** and **Material** tabs. 3. Tap **Update details** to save the changes. The calendar view is automatically updated to reflect the changes.
Mark assemblies as loaded	1. Tap the three dots next to the load name and select **Edit**. 2. Go to the **Material** tab. 3. Tap the three dots next to the assembly name and select **Load**. 4. Tap the **Load** button. 
Create bills of lading	1. Tap the three dots next to the load name and select **Bill of Lading**. 2. Enter the required details. 3. Tap the **Make Report** button to create the bill of lading.
Ship loads	1. Tap the three dots next to the load name and select **Ship**.

To	Do this
	2. Tap the **Ship load** button. The load automatically turns green in the calendar view.
Unship loads	• Tap the three dots next to the load name and select **Un-Ship**. This option is available only for loads that have been marked as shipped.
Delete loads	• Tap the three dots next to the load name and select **Delete**.

Schedule, reschedule, and unschedule loads

You can either use the planned shipping date in the load properties or you can add unplanned loads directly onto the shipping calendar.

To	Do this
Schedule loads in the load properties	1. Open Tekla EPM. 2. In the **Load Properties** dialog box, click **Planned Ship Date** and enter a date.  3. Tap **Save** to save the changes. The load will automatically be added to the shipping calendar in Tekla EPM Go on the specified date.
Schedule loads in the shipping calendar	1. Tap . A side panel appears showing all the unshipped loads that have not yet been scheduled. 2. If you wish, you can tap the **Destinations** and **Jobs** buttons to filter the unplanned loads by destination and job. 3. Tap the three dots next to the load name. 4. Tap **Schedule**.

To	Do this
	5. Enter the required date. 6. Tap **Apply** to save the changes.
Schedule loads by dragging	1. Tap  to switch on the drag-and-drop tool. 2. Drag the load onto the required day.  The **Planned Ship Date** is automatically updated to the load properties in Tekla EPM. **NOTE** The performance of the drag-and-drop tool depends on your device.
Reschedule loads	1. Tap the three dots next to the load name. 2. Tap **Reschedule**. 3. Select the new date. 4. Tap **Apply** to save the changes. Alternatively, you can simply drag the load onto the required day.
Unschedule loads	1. Tap the three dots next to the load name. 2. Tap **Unschedule**. The load returns to the list of unplanned loads.

View the destination in Google Maps

When the load is ready to be shipped, you can plan the best route by viewing the shipping destination in Google Maps.

1. Tap the three dots next to the load name and select **Load details** to open a view that shows all the individual assemblies assigned to the load.
2. Tap to show the destination on the map.

See also

Plan and manage shipments (page 53)

Change shipping calendar settings (page 54)

Change how loads are displayed (page 55)

View load details (page 56)

Create and manage loads (page 59)

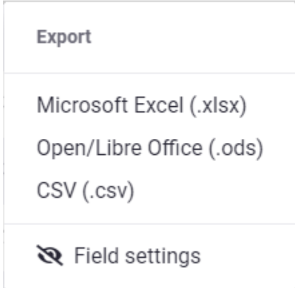
Schedule, reschedule, and unschedule loads (page 60)

Export load lists (page 62)

Export load lists

You can export load lists from Tekla EPM Go and download them to your device in the `.xlsx`, `.ods`, or `.csv` format.

1. Tap the three dots next to the load name and select **Load details** to open a view that shows all the individual assemblies assigned to the load.
2. Tap .
3. Tap one of the export options.



The file is downloaded to your device in the selected format.

4. Save the file.

See also

Plan and manage shipments (page 53)

Change shipping calendar settings (page 54)

Change how loads are displayed (page 55)

View load details (page 56)

Create and manage loads (page 59)

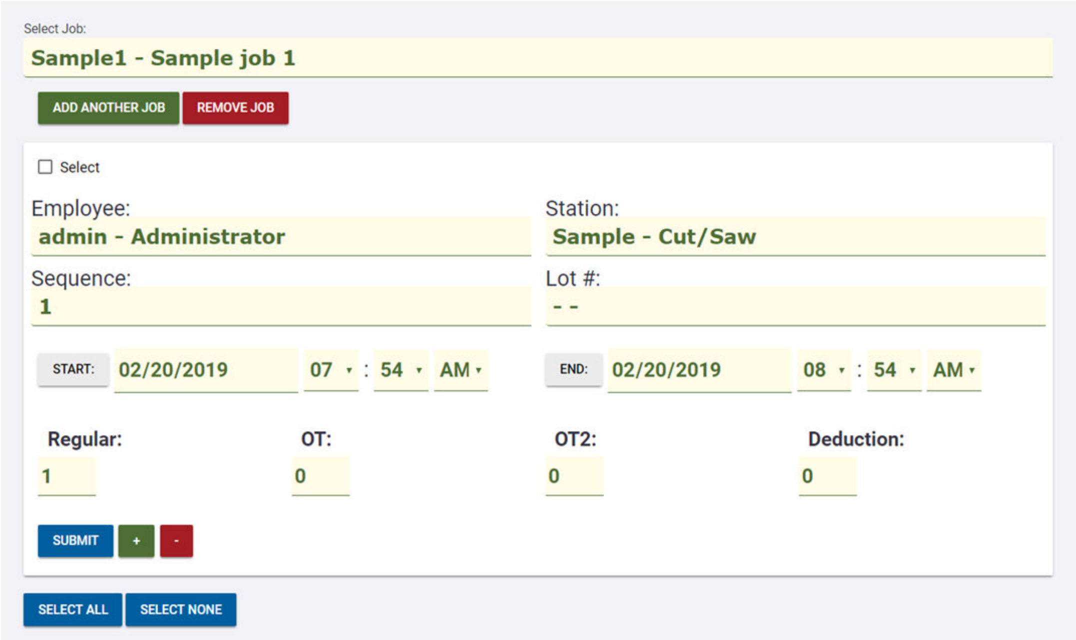
Schedule, reschedule, and unschedule loads (page 60)

View the destination in Google Maps (page 61)

1.6 Add time tracking records

In Tekla EPM Go, you can add labor time to multiple production control jobs. The regular labor hours that is added shows in both the production schedule and the project schedule.

1. Tap the file menu icon  in the upper-left corner.
2. On the menu, select **Time Tracking**.



You can now add time tracking records.

Add time tracking records

1. Tap the **Select Job:** list to select the job for which you want to add labor time.

   A section for adding the time tracking record is shown.

   The available fields are set in the time tracking settings in the Tekla EPM desktop application.

2. Tap the available fields to select or type the employee, station, and other necessary information.

3. Do one of the following:

   - To add a time tracking record by date only, select the **Date Entry Only** check box.
   - To add a time tracking record by date and time, clear the **Date Entry Only** check box.

4. Set the start and end times by tapping the date and time fields and tapping the arrow buttons to change the values.

   The time tracking settings set in the Tekla EPM desktop application determine if multiple time tracking records of the same user can overlap or not.

   The regular labor hours are automatically calculated based on the start and end times.

5. If necessary, modify the regular, overtime, double overtime, and deduction hours in the available fields.

   The **Deduction** field is meant for the time that is used for unpaid activities, such as lunch. This time will not be logged against the project, ask, station, sequence, or lot.

6. If you want to add more than one time tracking record at a time, do any of the following:

To	Do this
Add more time tracking records for the current job	• Tap the **+** button at the bottom of the current time tracking record.
Add time tracking records for another job	a. Tap the **Add Another Job** button. b. In the **Select Job:** list, tap the job to which you want to add a time tracking record.

   A new time tracking record appears under the current one.

   Repeat steps 2 to 5 for all the time tracking records that you want to add.

7. To submit the time tracking records, do any of the following:

To	Do this
Submit one record	• Tap **Submit** at the bottom of the time tracking record.
Submit multiple records	a. Select the **Select** check box in the upper-left corner of the desired time tracking records. b. Tap **Submit Selected** below all time tracking records.
Submit all records	• Tap **Submit All** below all time tracking records.

The time tracking records are added for the selected jobs.

You can view the added time tracking records in the **Time Tracking Detail** dialog box in the Tekla EPM desktop application.

Delete time tracking records

You can delete any time tracking records that have not yet been submitted.

- Tap the **-** button at the bottom of the time tracking record.

The record is deleted.

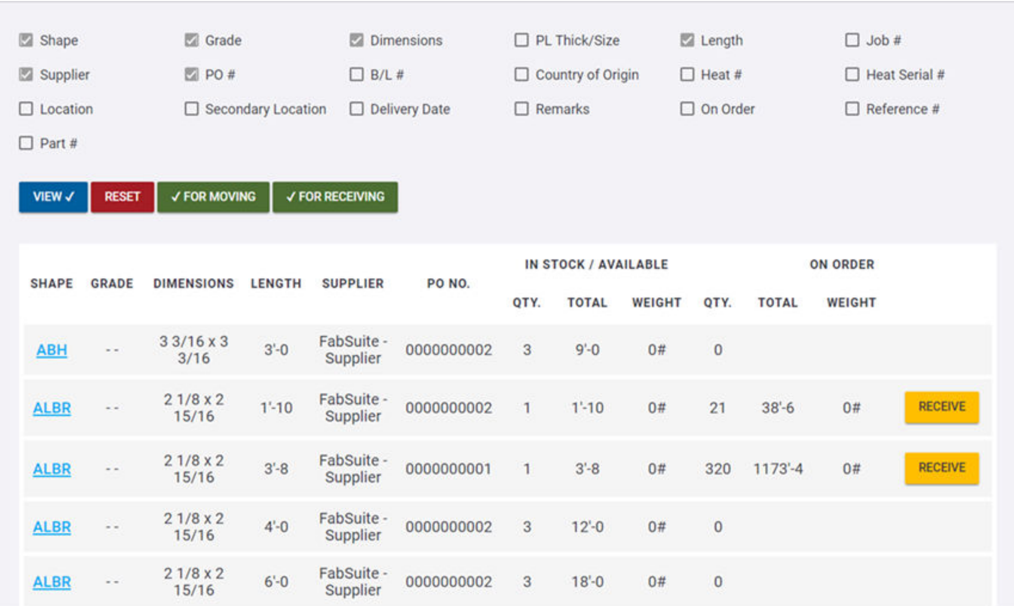
View and manage inventory materials

In Tekla EPM Go, you can view the material items in the inventory. You can also receive material items or move material items to other inventory locations.

1. Tap the file menu icon in the upper-left corner.
2. On the menu, select **Inventory**.
3. Depending on which material items you want to view, select one of the following options:
   - **Received / On Hand Only**: shows the material items that are in stock.
   - **On Order Only (Receiving)**: shows and allows you to receive material items that are on a purchase order.
   - **Both On Hand and On Order**: shows all material items on a purchase order and in stock.
4. Tap the arrow on the right side of the **Initial View** list and select the property according to which the material items should be sorted.

   Note that selecting a high level property for the initial view makes it quicker and easier to filter the shown inventory items.
5. Tap **View Inventory**.

   The material items are shown.



SHAPE	GRADE	DIMENSIONS	LENGTH	SUPPLIER	PO NO.	IN STOCK / AVAILABLE QTY.	TOTAL	WEIGHT	ON ORDER QTY.	TOTAL	WEIGHT	
ABH	--	3 3/16 x 3 3/16	3'-0	FabSuite - Supplier	0000000002	3	9'-0	0#	0			
ALBR	--	2 1/8 x 2 15/16	1'-10	FabSuite - Supplier	0000000002	1	1'-10	0#	21	38'-6	0#	RECEIVE
ALBR	--	2 1/8 x 2 15/16	3'-8	FabSuite - Supplier	0000000001	1	3'-8	0#	320	1173'-4	0#	RECEIVE
ALBR	--	2 1/8 x 2 15/16	4'-0	FabSuite - Supplier	0000000002	3	12'-0	0#	0			
ALBR	--	2 1/8 x 2 15/16	6'-0	FabSuite - Supplier	0000000002	3	18'-0	0#	0			

6. To define which properties of material items are shown, select the applicable check boxes at the top of the page.

For example, if you want to view the job number and the bill of lading number, select the **Job No.** and **Bill of Lading No.** check boxes.

Items without a job number are open stock.

You can select nine check boxes at a time.

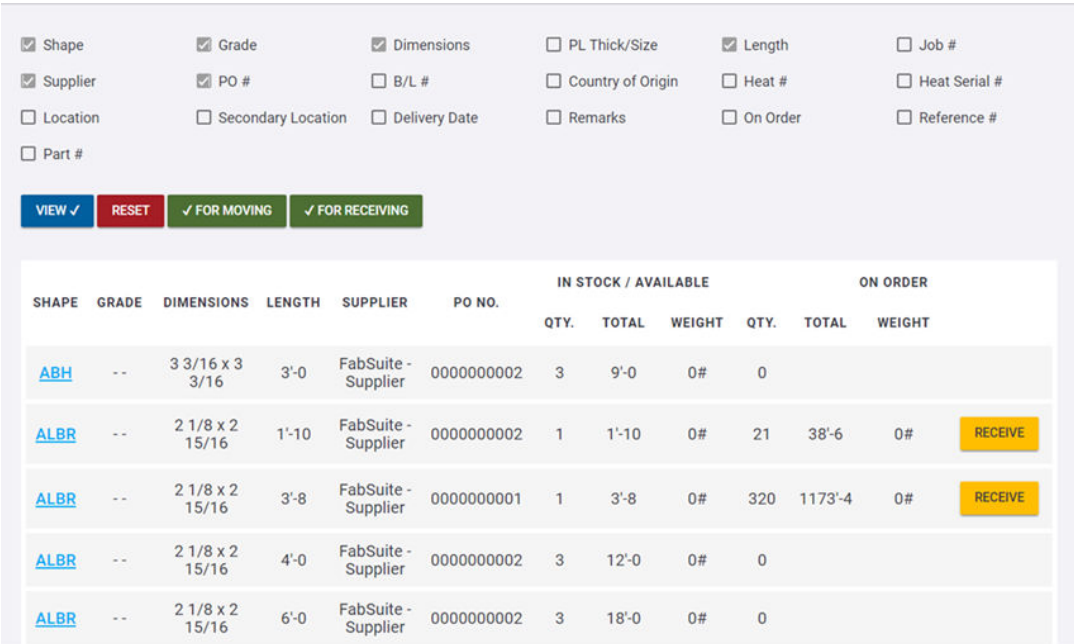
7. To update the material item properties that are shown, tap **View**.

See also

Move inventory items to another inventory location (page 67)

Move inventory items to another inventory location

Use the **Move** button in Tekla EPM Go to change the inventory locations of items.



1. In the inventory view, tap the **For Moving** button.

   The inventory view updates so that you can move material items.

2. Scroll to the material item that you want to move, and tap the **Move** button.

   Note that you cannot move any items that are not in stock.

3. Type the quantity of pieces that you want to move.
4. Tap the arrows on the right side of the **New Location** and **New Secondary Location** lists and select the desired inventory locations.
5. Tap the **Move** button.

6. Tap the **Confirm** button.

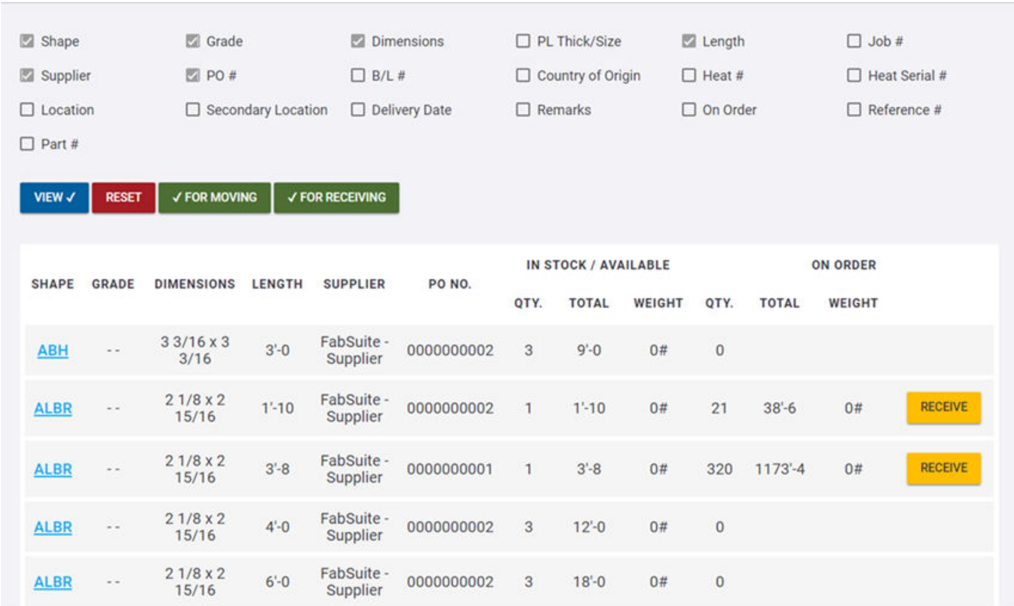
   Repeat steps 2 to 6 for all items that you want to move to new inventory locations.

7. When you are ready, tap the **Reset** button to reset the inventory view.

Receive inventory items

In Tekla EPM Go, you can mark inventory items as received.

1. In the inventory view, tap the **For Receiving** button.

   The inventory view updates so that you can receive material items.

2. Scroll to the material item that you want to receive, and tap the **Receive** button.
3. Type the quantity of items that is received.
4. According to your needs, type the bill of lading number and the heat number.
5. Tap the arrows on the right side of the **New Location**, **New Secondary Location**, and **Country Of Origin** lists and select the desired options.
6. Tap **Receive**.
7. Tap **Confirm**.

   Repeat steps 2 to 7 to receive all necessary material items.

8. When you are ready, tap **Reset** to reset the inventory view.

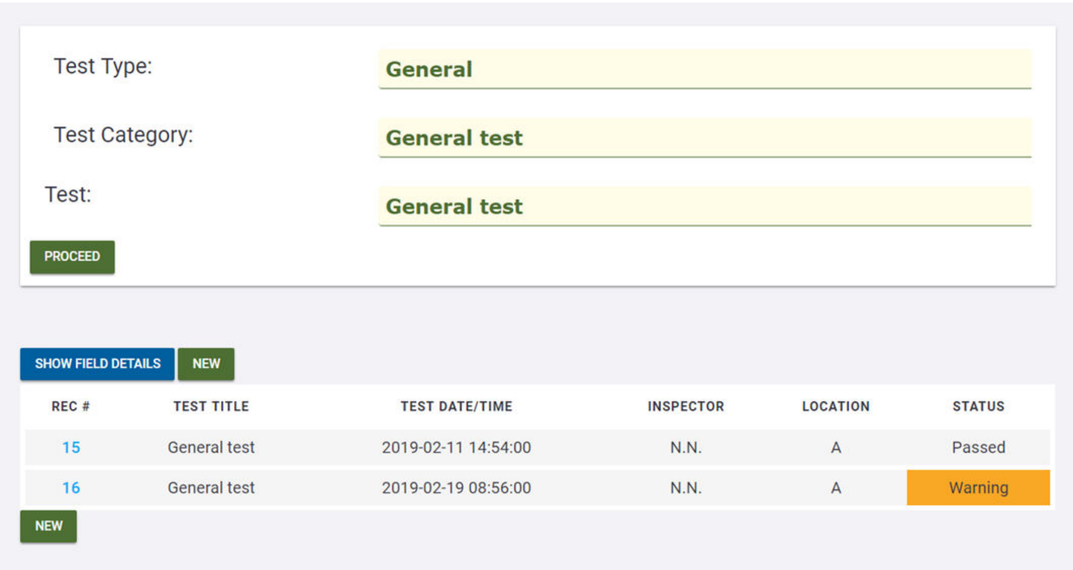
1.7 View and modify general inspection test records

All inspection test types except for the **Assembly**, **Part** , and **Load** test types are considered general inspection tests. The available general test types are set in the Tekla EPM desktop application. You can view the inspection records of the general test types in Tekla EPM Go by selecting the **General Inspections** option. You can also add, modify, and delete general inspection test records.

1. Tap the file menu icon  in the upper-left corner.
2. On the menu, select **General Inspections**.
3. Tap the available lists to select the test type, test category, and test that you want to run.

   The test types, categories, and test names are created in the Tekla EPM desktop application.
4. Tap **Proceed**.

The existing inspection test records that match the test type, category, and test name are shown.



If you want to show more information about the field values within the records, tap **Show Field Details**. You can hide the field values by tapping **Hide Field Details**.

Add an inspection test record

1. Tap **New**.
2. Do one of the following:

- Tap the lists to select the inspection location and inspector. Then, define the test hours, and add any other information in the available fields.
- To use the properties of the latest record, tap **Copy from previous test**.

3. To attach a file to the record, do the following:
   a. Tap **Add file**.
   b. Browse to find the file that you want to attach and select it.
   c. Tap **Open**.
   d. Type a description for the file.

   To add more files, repeat steps a to d.
4. When you are ready to submit the record, tap **Submit Now**.
5. Tap **Confirm**.

The inspection test record is added to the list of visible test records.

Add a follow-up test record

Adding a follow-up test record allows you to change the test status from failed to passed without losing the original failed test record.

1. In the **Record No.** column, tap the inspection test record to which you want to to add a follow-up test record.
2. At the bottom of the inspection test record view, tap **Run Follow-up Test**.
3. Do one of the following:
   - Tap the lists to select the inspection location and inspector. Then, define the test hours, and add any other information in the available fields.
   - To use the properties of the latest record, tap **Copy from previous test**.
4. To attach a file to the record, do the following:
   a. Tap **Add file**.
   b. Browse to find the file that you want to attach and select it.
   c. Tap **Open**.
   d. Type a description for the file.

   To add more files, repeat steps a to d.
5. When you are ready to submit the record, tap **Submit**.
6. Tap **Confirm**.

The follow-up test record is added to the list of visible test records.

Once you have added a passed follow-up test record, the status of the original test record changes from `Failed` to `Failed (FTP)`. This indicates that a passed follow-up test has been run for the original test record.

The status of the passed follow-up test record value reads `Passed (FT)` to indicate that the record is a follow-up test record.

Modify an inspection test record

1. Scroll to find the inspection test record that you want to modify.
2. Tap the record number in the **Record No.** column.

   The record details are shown.
3. At the bottom of the record details, tap **Edit Test Record**.
4. Tap the available lists to change the inspection location and inspector.
5. Modify the test hours.
6. Modify any other necessary information in the available fields.
7. To attach a file to the record, do the following:
   a. Tap **ADD FILE**.
   b. Browse to find the file that you want to attach and select it.
   c. Tap **Open**.
   d. Type a description for the file.

   To add more files, repeat steps a to d.
8. To update the record, tap **Submit**.
9. Tap **Confirm**.

Delete an inspection test record

1. Scroll to find the inspection test record that you want to delete.
2. Tap the record number in the **Record No.** column.

   The record details are shown.
3. At the bottom of the record details, tap **Delete Test Record**.
4. To permanently delete the record, tap **Confirm** twice.

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