SE Suite Mobile

Summary

Introduction

The mobile version of SE Suite allows you to perform management actions on your smartphone. There are two ways to access the system:

- On tablets, by accessing the SE Suite URL in the browser of your device; or
- On smartphones, through the SE Suite Mobile Android application.

Available operations:

- Portal view:
  - Analytics visions;
  - Performance indicators;
  - HDM cards;
- Starting a workflow;
- Reporting a problem;
- Reporting an incident;
- Executing asset verification;
- Executing assets inventory;
- Executing nonproject task;
- Executing document acknowledgment publication;
- Executing document revision (review, approval and release steps);
- Executing incident activities;
- Executing maintenance tasks;
- Executing problem activities;
- Executing project tasks;
- Executing workflow activities.

The applications of the following components are also displayed:

- **SE Document**: Allows viewing documents offline.
- **SE Maintenance**: Allows accessing preventive and programmed maintenances assigned to your user and team.

The details of the configuration and the use of these applications will be described in the course of this documentation.

The use of the system on tablets occurs in the same way as in the Desktop version, however, some features such as Action plan structure, Project Gantt chart, and Audit execution may not be appropriate for this device.

It is important to point out that the mobile version allows only one simultaneous connection, that is, you will not be able to access SE Suite from two cellphones at the same time.

There is also the SE Document application that allows viewing documents in offline mode. The details of the configuration and the use of this application will be described in the course of this documentation.

See below, the minimum requirements to access the SE Suite using mobile devices.

Minimum requirements

See below, in the following tables, the minimum requirements that mobile devices (smartphones and tablets) must have in order to

be able to access SE Suite via browser or to download the Android application.

iOS operating system	
Operating system version	Last two releases of first digit - we recommend the use of the most recent version.
Browsers[1]	Safari or Google Chrome
Memory (RAM)	2 GB
Processor	1.2 GHz
Display	4.7''
Screen resolution	750 x 1334
Storage	16 GB

Android operating system	
Operating system version	Last two releases of first digit - we recommend the use of the most recent version.
Browsers[1]	Google Chrome
Memory (RAM)	4 GB
Processor	1.2 GHz
Display	4'' (via application/smartphone) 5'' (via browser/tablet)
Screen resolution	640 x 1136 (via application/smartphone) 720 x 1280 (via browser/tablet)
Storage	16 GB

1. It is always recommended using the latest version of browsers.

Other recommendations

Some smartphones and tablets stand out in the market because they have a higher performance, thus offering a better experience for users.

Therefore, to enjoy a better experience when using SE Suite on mobile devices, it is recommended to use some specific product lines (following the minimum requirements above).

Smartphones recommended for using SE Suite via application:

- Samsung Galaxy S7 (or similar/superior)
- iPhone 7
- Xiaomi Redmi 9

Smartphones and tablets recommended for using SE Suite via browser:

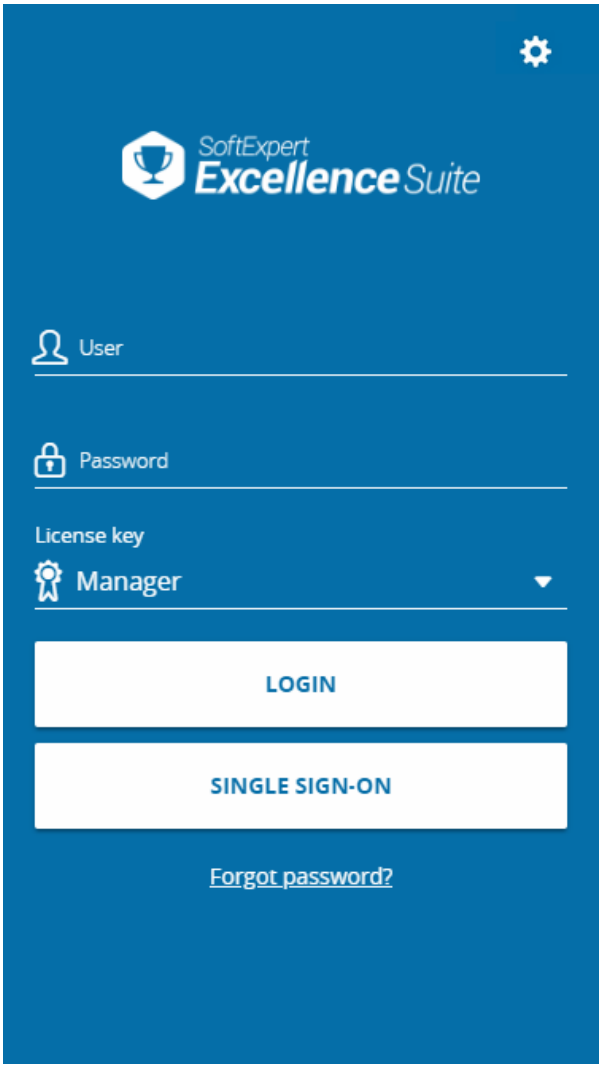
- Apple iPhone 6 (or similar/superior)
- Apple iPad 7 (or similar/superior)
- Samsung Galaxy Tab A7 (or similar/superior)

Important!

All models mentioned may be replaced by higher models or similar, provided they meet the minimum requirements for operation.

SE Suite Application (Android)

The application not only improves your experience in using the mobile version of the system, but also allows for a better integration between your device and SE Suite, enabling resources such as reading *QR Code* or barcodes through the device's camera. The SE Suite application is available on Play Store.



After downloading the application, upon accessing it for the first time, the home screen, which will guide you through the initial configurations for the application, will be displayed.

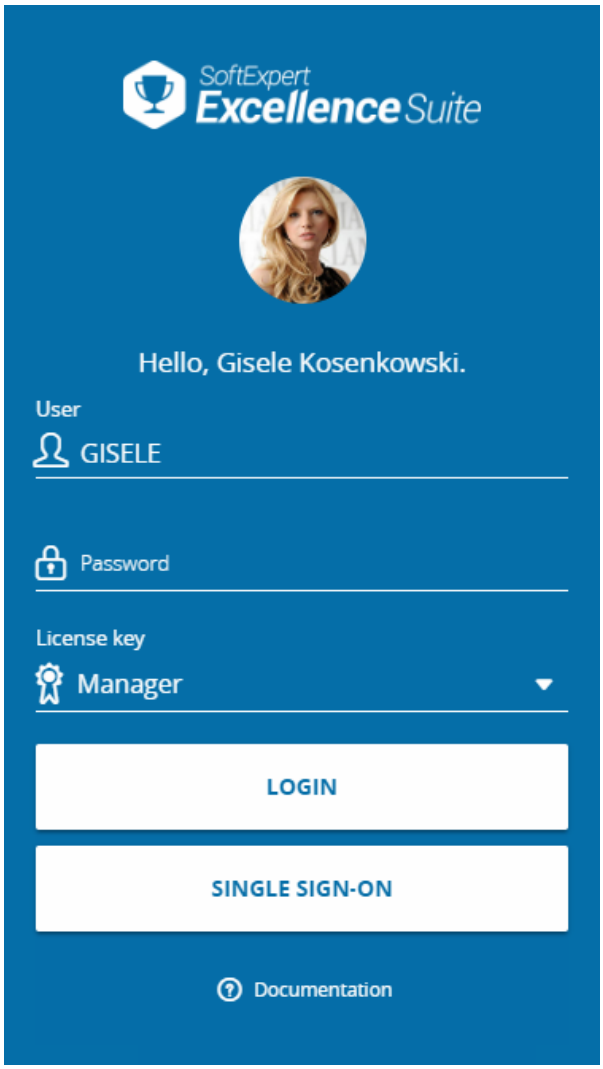
First, you will need to enter the URL that will be used to access the system. Once a valid URL is informed, the ✓ icon will be displayed and the SAVE button will be enabled.

After saving the system URL, the login screen, which is described next, will be displayed.

If it is necessary to alter the system URL, simply log off and click on the ⚙ button on the login screen. At this point, the screen for the system URL configuration will be displayed.

Part 1 – Quick start

Login



In order to be able to access portals and tasks from SE Suite on your smartphone, first log in to the system. To do that, in the browser of your smartphone, access the URL of SE Suite. At this point, the login screen will be displayed in mobile mode.

Enter, in the respective fields, the *User* and *Password* and click on the LOGIN button.

If the SINGLE SIGN-ON button is showing on the login screen, then this authentication mode is enabled on the system. When clicking on this button, the system will display a screen on which the account that will be used to log in to the system should be informed.

If the *License key* field is showing after informing the user, it indicates that the user is part of more than one access group that have different access licenses. If necessary, select the license that will be used to perform the system access.

Interface detail

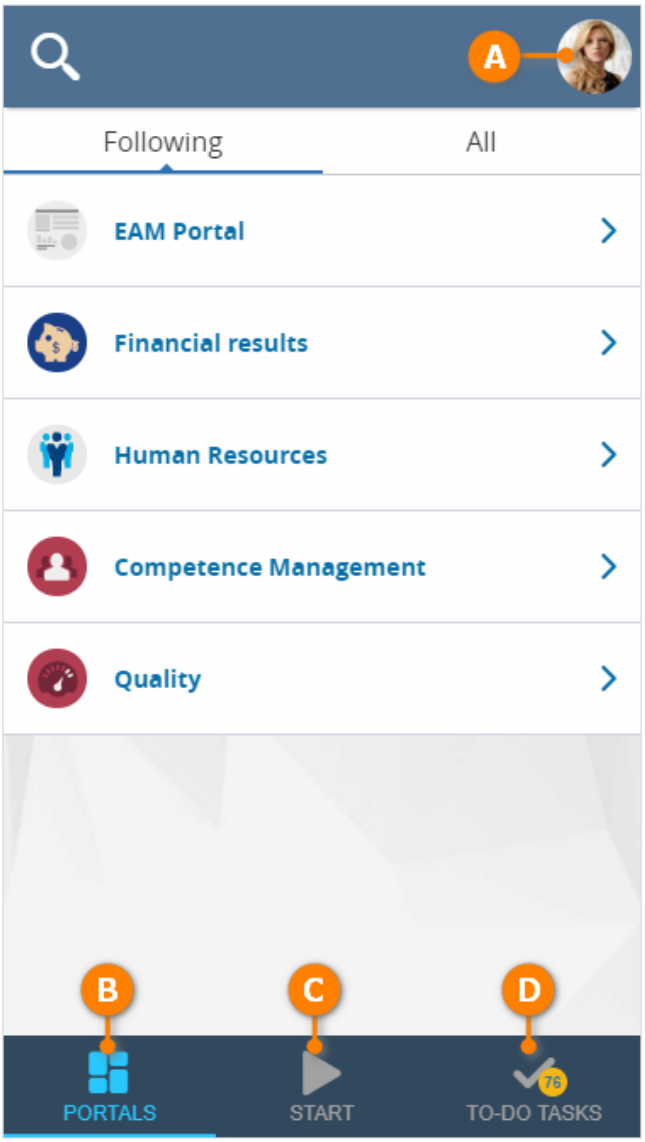
After successfully logging in, the system screen will be loaded, displaying the portals you are following.

A User: Displays the user image which, when clicked, allows viewing the full name and user department, and it also displays the button to exit the system.

B Portals: This menu will be displayed by default when logging into the system.

C Start: Displays the operations available for the mobile version of the system and that you have permission to run.

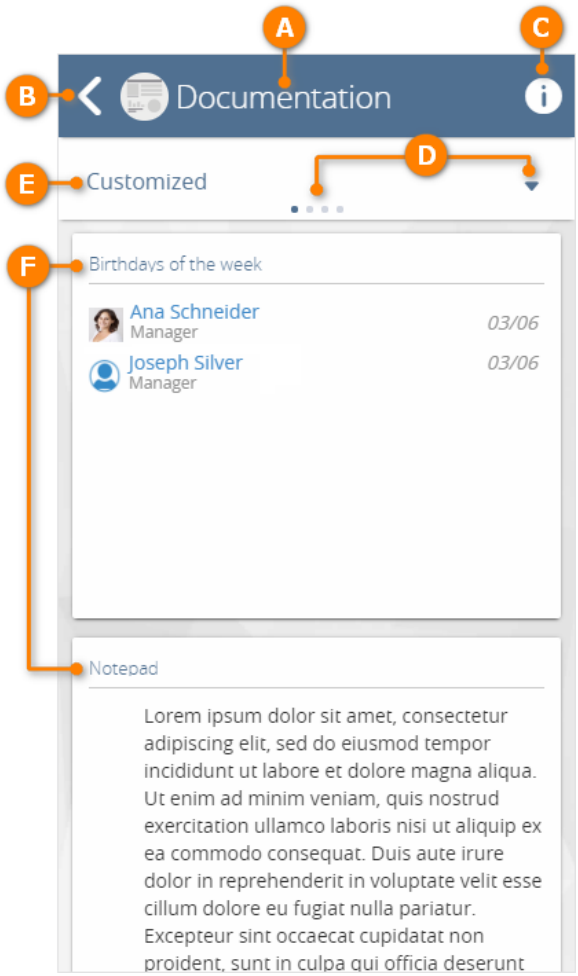
D To-do tasks: Displays the available tasks for the mobile version of the system that are pending for you to run.



Part 2 – Portals

Through this section, the system will list the portals that you are *Following*, in addition to *All* portals created in the system and that you have access.

When opening a Portal, the system will display all cards from it, however, only the "*mobile friendly*" cards will be loaded for viewing when SE Suite is being accessed via smartphone. "*Mobile friendly*" *cards are adapted for mobile devices.*



A At the top of the screen, the system displays the title of the Portal being accessed.

B Next to the title, the system will display the "Back" button that allows returning to the previous - page.

C When clicking on this button, the system will display the information about the Portal.

D These buttons are displayed when the Portal has multiple panels (tabs). To change tabs, slide the screen to the side and click on the arrow button, selecting the desired panel.

E Displays the name of the panel that is being viewed.

F Card title that is being viewed.

Available cards

SE Suite (Customized)

- **Portal list**: This card will display a listing of portals. The portals of this list were defined during the card/portal configuration.

- **External links**: This card will display a list of URLs. The links in this list were set during the card/portal configuration.

- **Notepad**: This card will provide informative content. The content of this card will be a text that is informed and formatted during the portal configuration.

Analytics

- **Visions**: Portals that are configured with visions of SE Analytics can be viewed on mobile devices. These visions may come from external data sources or OLAP analyses from several SE Suite view menus.

Asset

- **Status of calibration/maintenance requests**: This card will display a chart with the number of calibration/maintenance requests per status.

Audit

- **Occurrence tracking:** This card will display the chart of the status of the deadlines for closed audit occurrences that were under the responsibility of the logged user, for tracking.

- **Occurrence tracking by audit:** This card will display the chart of the status of the deadlines for closed audit occurrences that were under the responsibility of the logged user, for tracking.

- **My audits:** This card will display the chart of the status of the deadlines for the audits that were under the responsibility of the logged user, for tracking.

Competence

- **My position requirements**: This card will display a list with the status of the position requirements of the logged user.

- **My team requirements**: This card will display a list with the status of the position requirements of the logged user and their subordinates.

Performance

- **Graph analysis**: This card will display a custom chart of SE Performance. The content of this card will be a graph analysis saved in the system.

- **SWOT analysis:** This card will display the values of a SWOT analysis. The content of this card will be an analysis saved in the system.

- **Strategy map:** This card displays a strategy map from SE Performance, with interaction options. The content of this card will be a strategy map created in the system.

- **Gauge**: This card will display the result of an indicator or element, from a period, through a Gauge chart.

- **Chart**: This card will graphically display the target and measurement of an indicator or element.

- **My indicators**: This card will list all the indicators that are under your responsibility.

- **Scorecard**: This card will display the Scorecard in the structure vision with drill-down options.

Action plan

- **Action tracking**: This card will display the chart with the status of the deadlines of the actions under the responsibility of the logged user, for tracking.

- **Action plan tracking**: This card will display the chart with the status of the deadlines of the action plans under the responsibility of the logged user, for tracking.

Training

- **Available courses**: This card will display a list of all courses available for online training.

- **Training participation**: This card will list all the trainings you participated in.

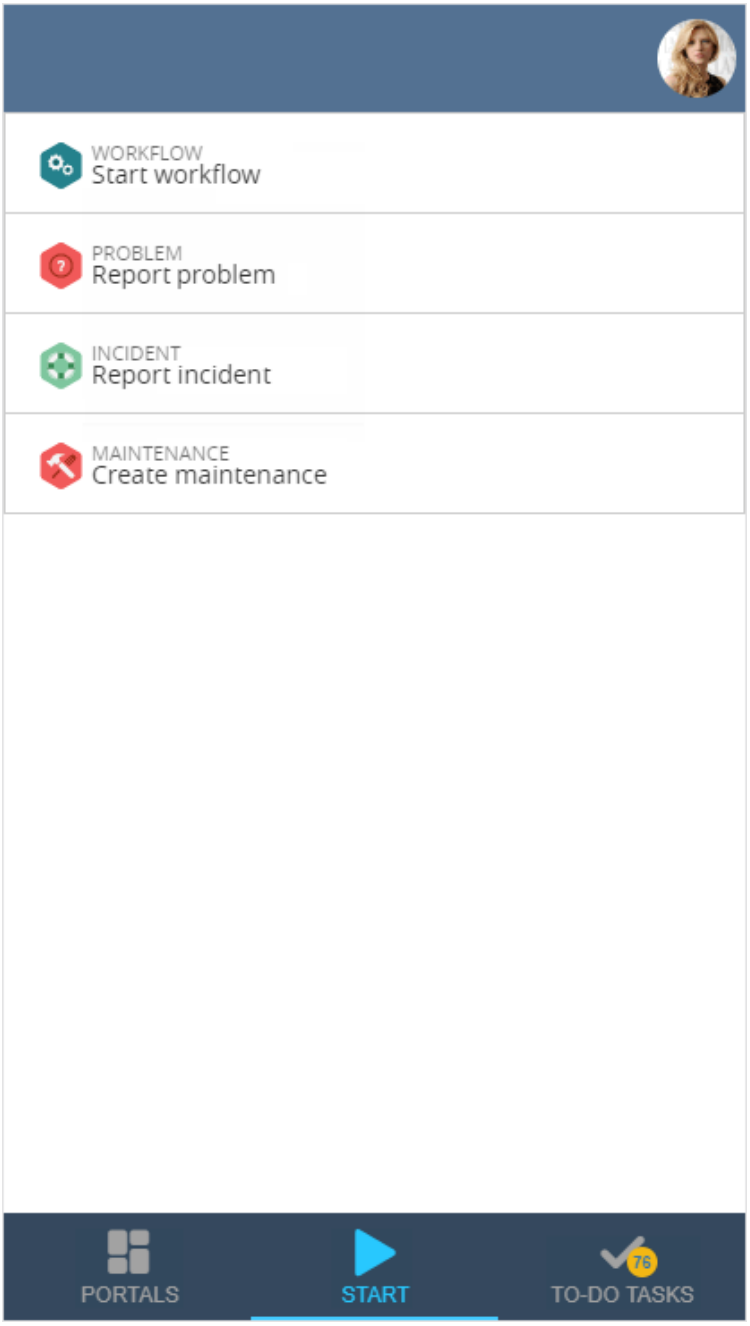
- **Training in progress**: This card will display all the trainings in progress that you are participating in.

- **Training enrollment**: This card will list all the trainings you can subscribe to.

- **Path**: This card will display all the paths available for online training.

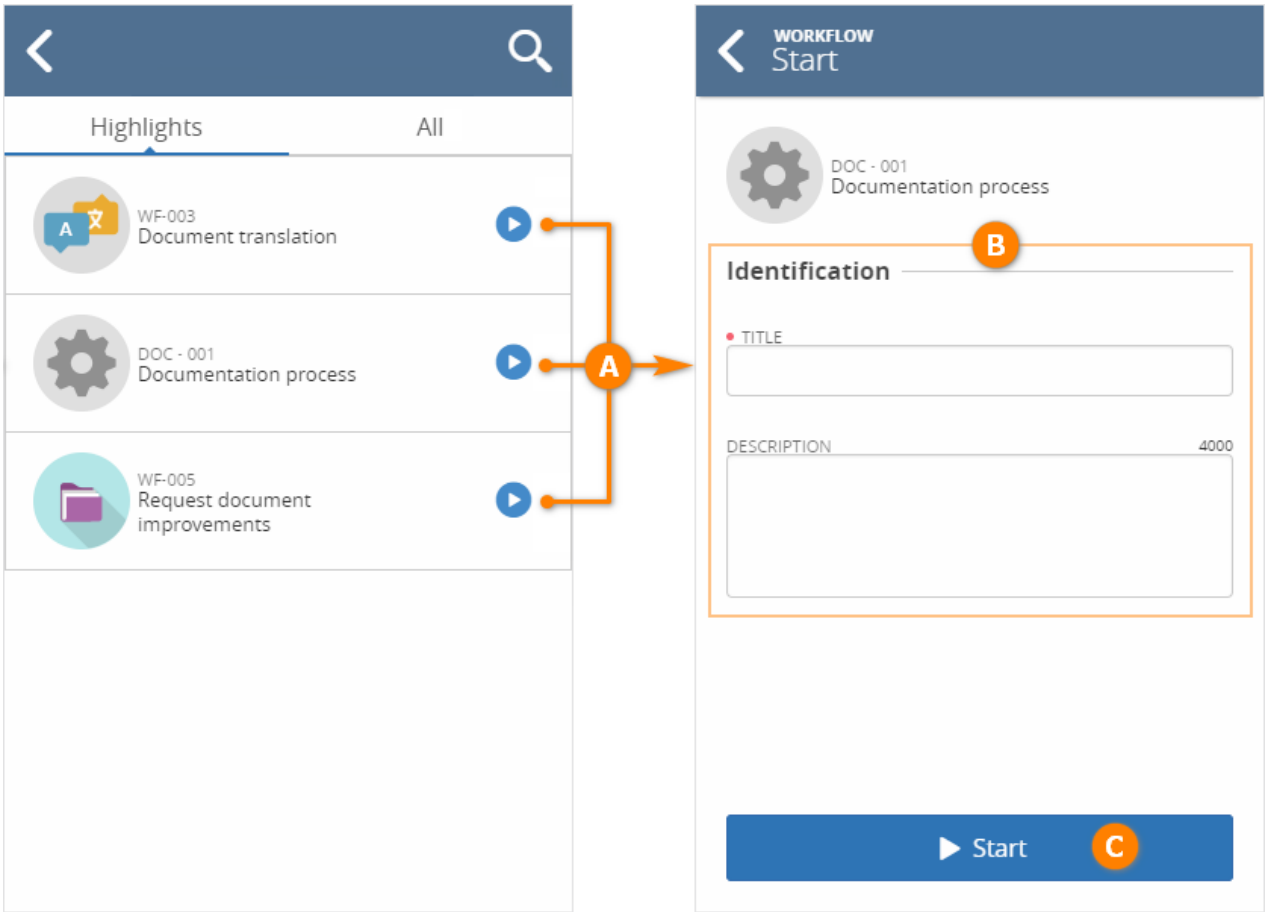
Part 3 – Start

In the "*Start*" section, the system will display the operations that you may initialize. It is worth remembering that, in addition to the components involved being part of the solution acquired by your organization, your user will need to be configured in an access group with permission to perform the operations described below.



Starting a workflow

When accessing this operation, the system will display the Workflows that you classified as favorites in the "Highlights" section. Although, if you wish to perform the start of another workflow, use the "All" section or type the process title in the search field.



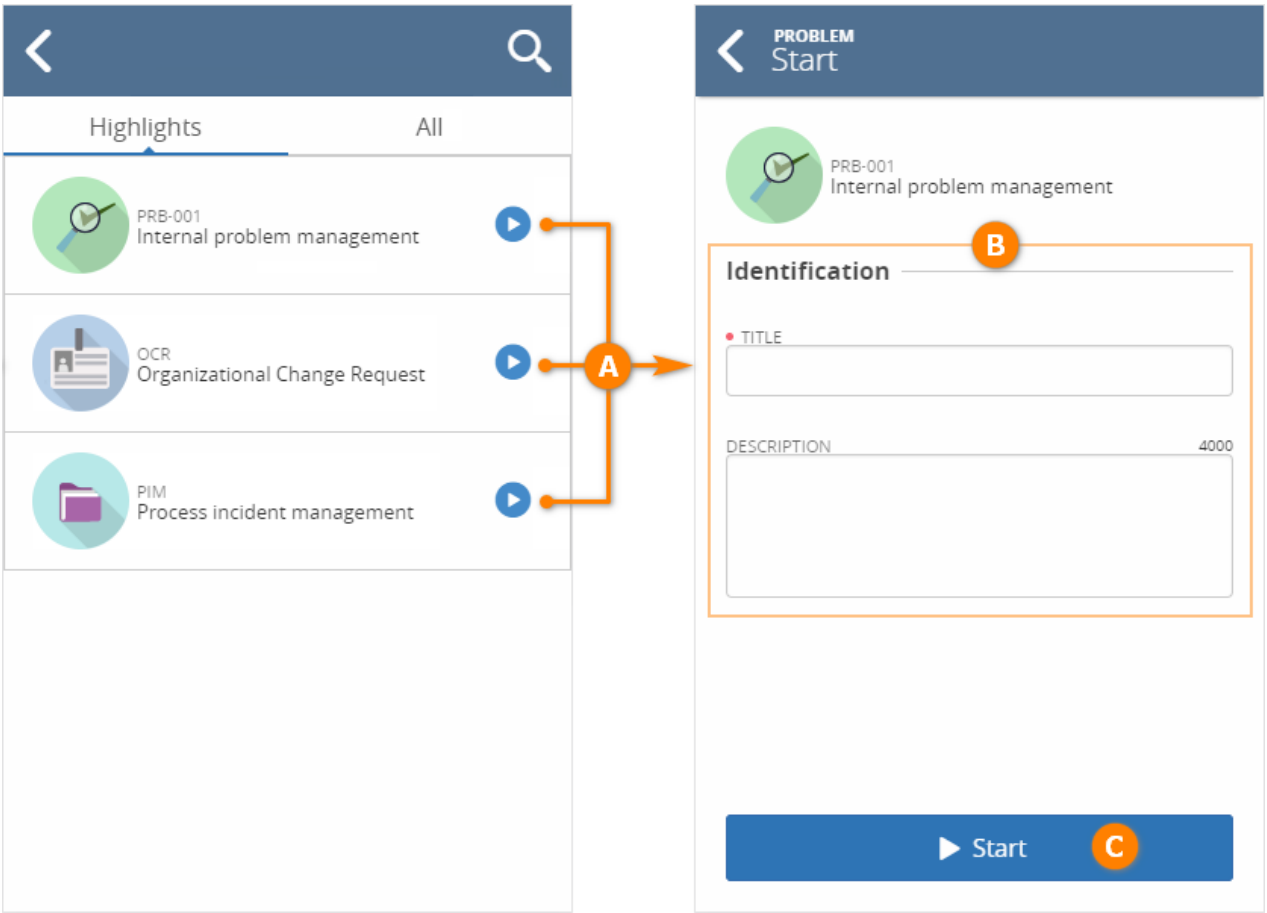
A After locating the workflow that will be started, click on it.

B At this point, the system will display the start screen, where the title of the instance and the description should be entered when it is required at the start.

C After that, click on the "Start" button. At this point, the system will be directed to the Workflow activity execution task.

Reporting a problem

When accessing this operation, the system will display the problem processes that you have classified as favorites in the "Highlights" section. However, if you wish to perform the record of another problem, use the "All" section or type the problem title in the search field.



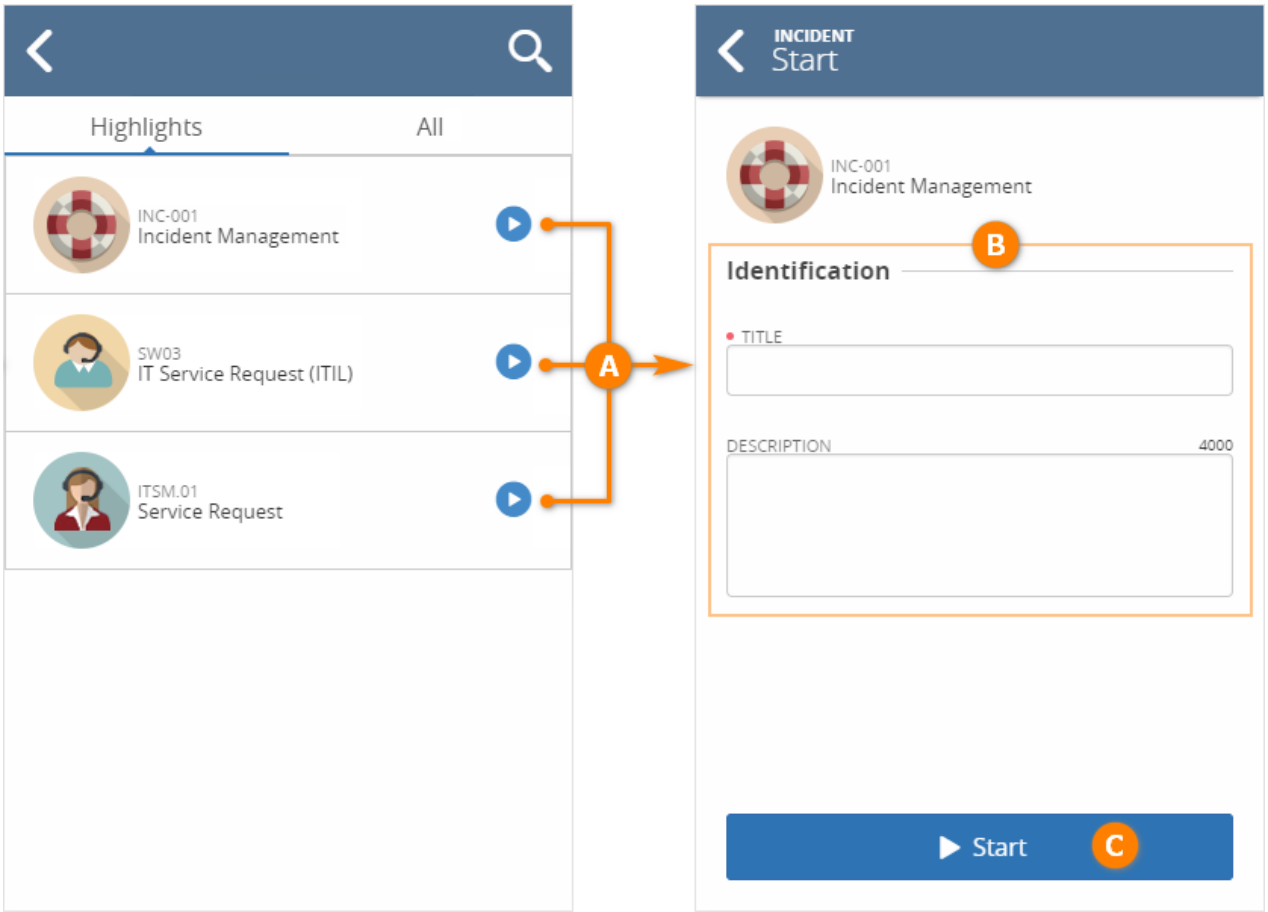
A After locating the problem that will be started, click on it.

B At this point, the system will display the start screen, where the title of the instance and the description should be entered when it is required at the start.

C After that, click on the "Start" button. At this point, the system will be directed to the Problem activity execution task.

Report an incident

When accessing this operation, the system will display the incident processes that you have classified as favorites in the "Highlights" section. However, if you wish to perform the record of another incident, use the "All" section or type the incident title in the search field.

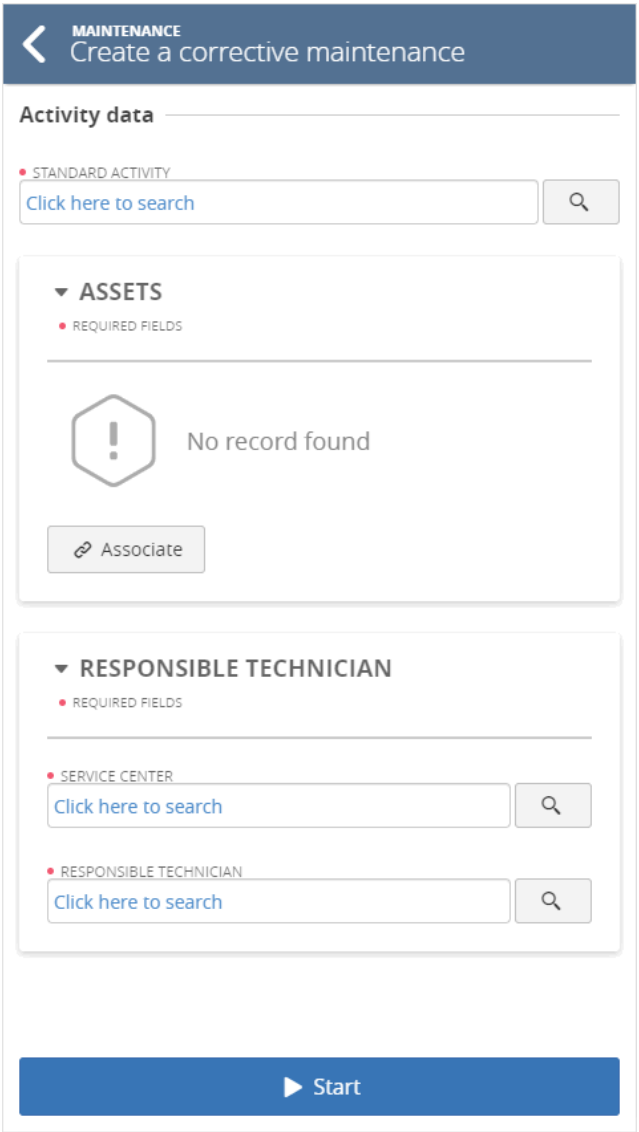


A After locating the incident that will be started, click on it.

B At this point, the system will display the start screen, where the title of the instance and the description should be entered when it is required at the start.

C After that, click on the "Start" button. At this point, the system will be directed to the Incident activity execution task.

Creating a maintenance



When accessing this operation, the "Activity data" section will display the fields to select the standard activity and associate the assets that will be maintained. In the "Responsible technician" section, enter the service center and the technician that will be responsible for the maintenance.

The "Attributes" section may be displayed if the selected standard activity has attributes.

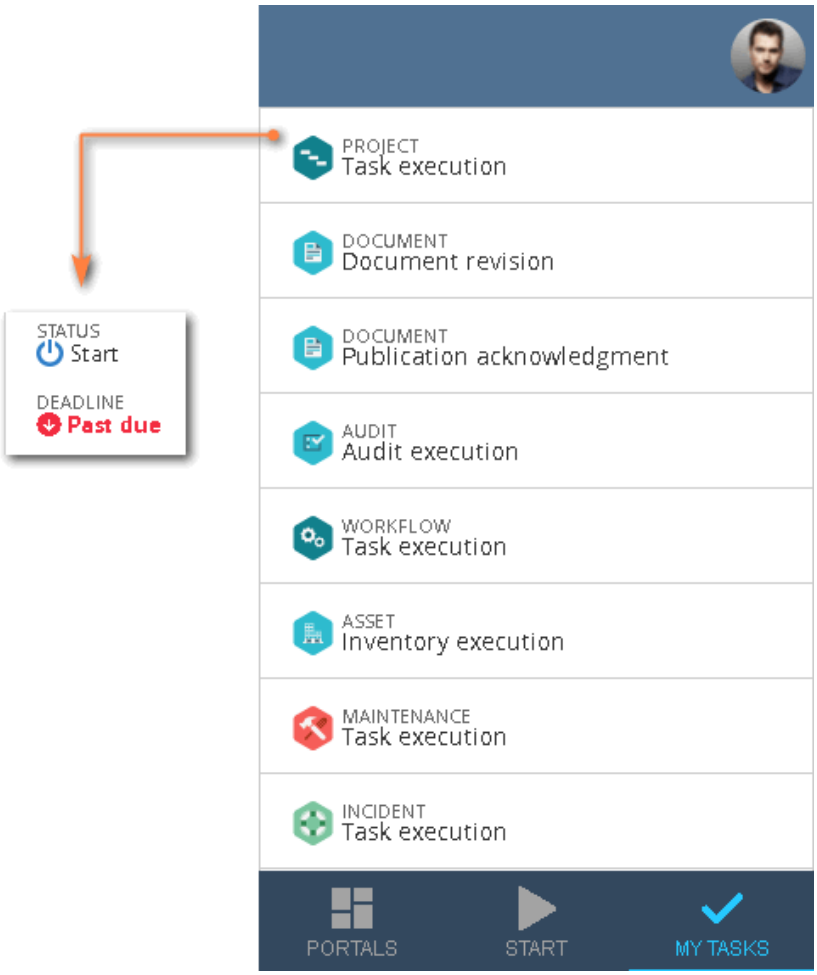
After filling in all necessary fields, click on "Start". To be able to start the activity, it will be necessary for all associated assets to be available. As soon as the maintenance is created, it will be displayed in the maintenance task listing. Refer to the "Executing a maintenance activity" section for details on how to execute the maintenance.

Part 4 – To-do tasks

In the "*My tasks*" section, the system will display some tasks in which the execution is pending with you.

Many of these tasks have a deadline, so in order not to be delayed, they must be executed within the period that each of them has been defined:

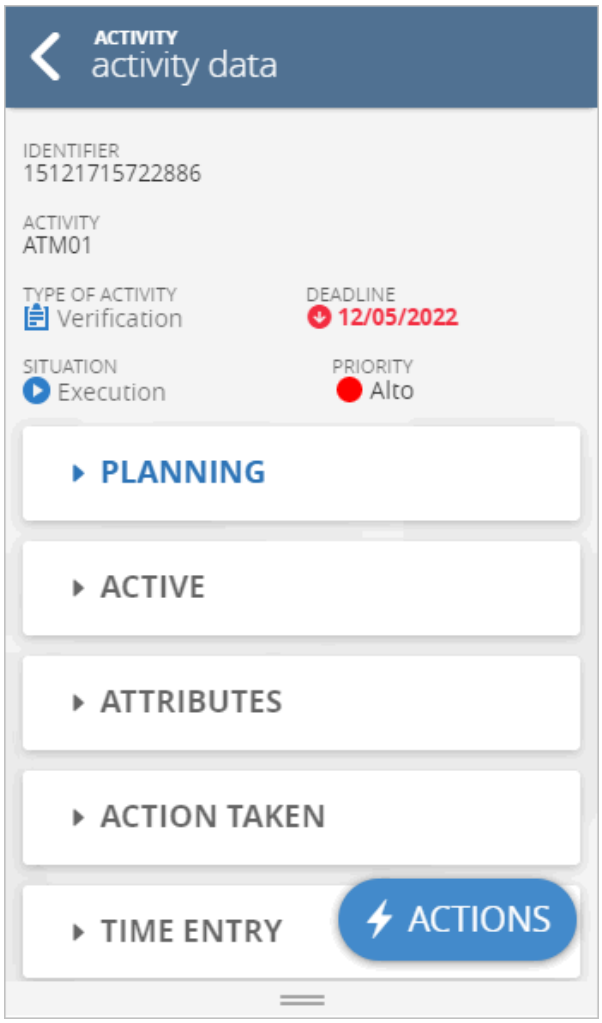
By opening the section of each specific component, it will be possible to view, in the task lists, the quantity, the deadlines, the statuses, the dates, and other information about each one, separately.



See below the details on how to perform the specific tasks available in the mobile version of SE Suite.

Executing an asset verification

The system will display the “Inventory verification” task of SE Asset if you are a member of the team responsible for verifying the inventory defined in the verification plan, or if you are the executor defined during verification programming.



When a verification execution task is opened, the activity data will be - displayed to be verified.

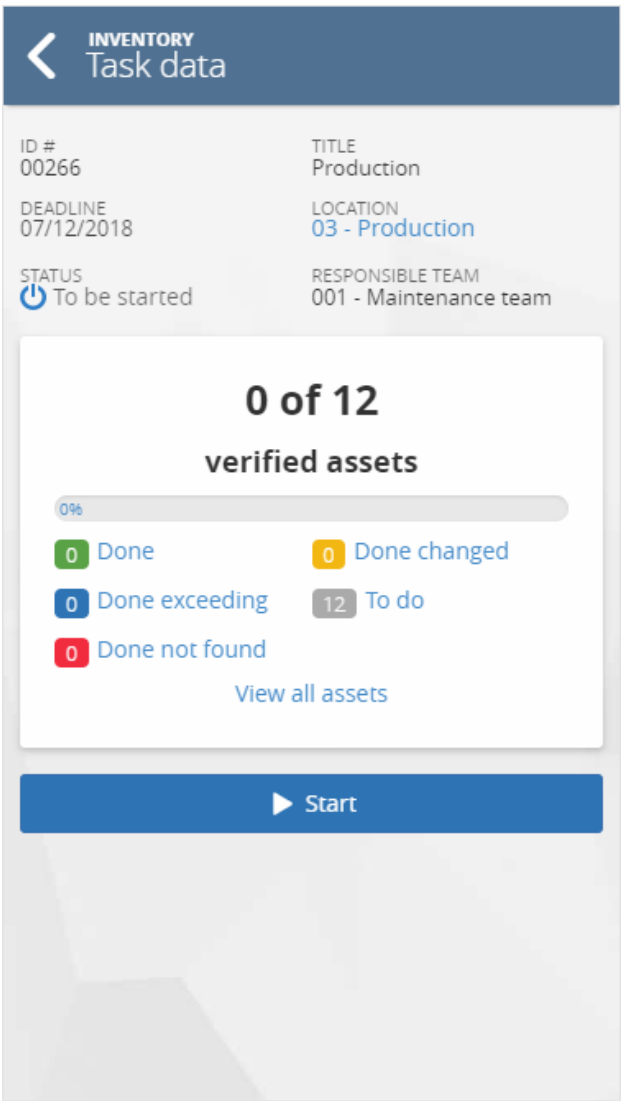
If the activity has not been started yet, click on the Start button. If the activity has already been started, click on the Continue button.

At this point, the "Actions" button will be displayed for you to finish the verification or disassociate the task from your user.

Executing an asset inventory

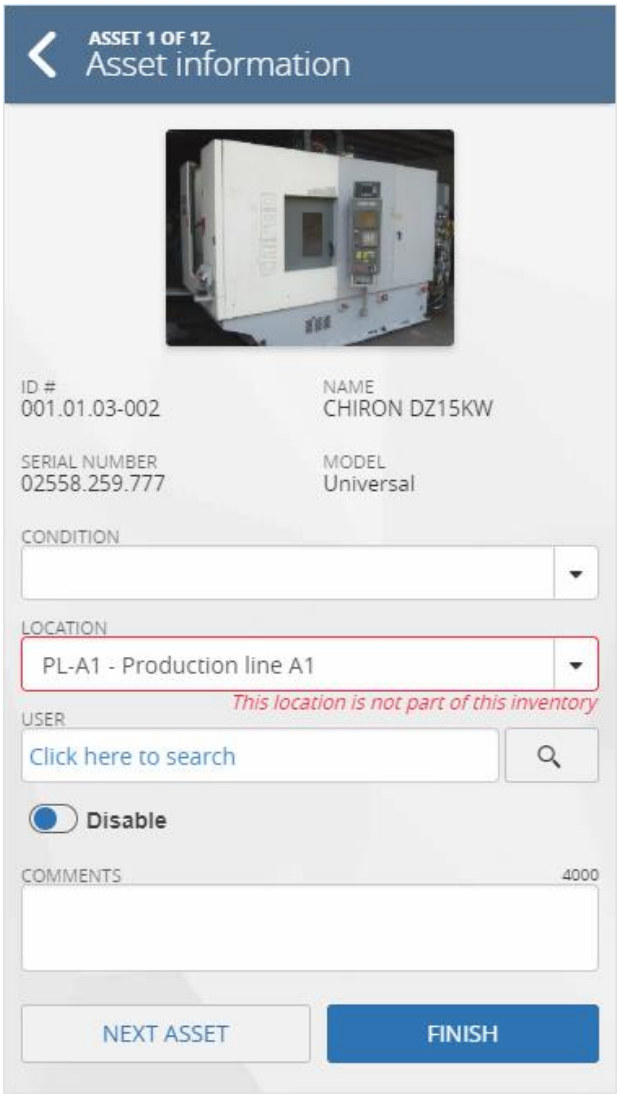
The system will display the "Inventory execution" task of SE Asset if you are the executor or are part of the team responsible for executing the inventory.

When an inventory execution task is opened, the task data will be presented along with the percentage of inventory asset verification.



If the activity has not been started yet, click on the Start button. If the activity has already been started, click on the Continue button.

At this point, if the activity is being accessed through the SE Suite application, the screen will be loaded with the smartphone camera for the reading of the QR Code or the barcode of the asset being verified. Otherwise, the field for selecting the asset being verified will be displayed.



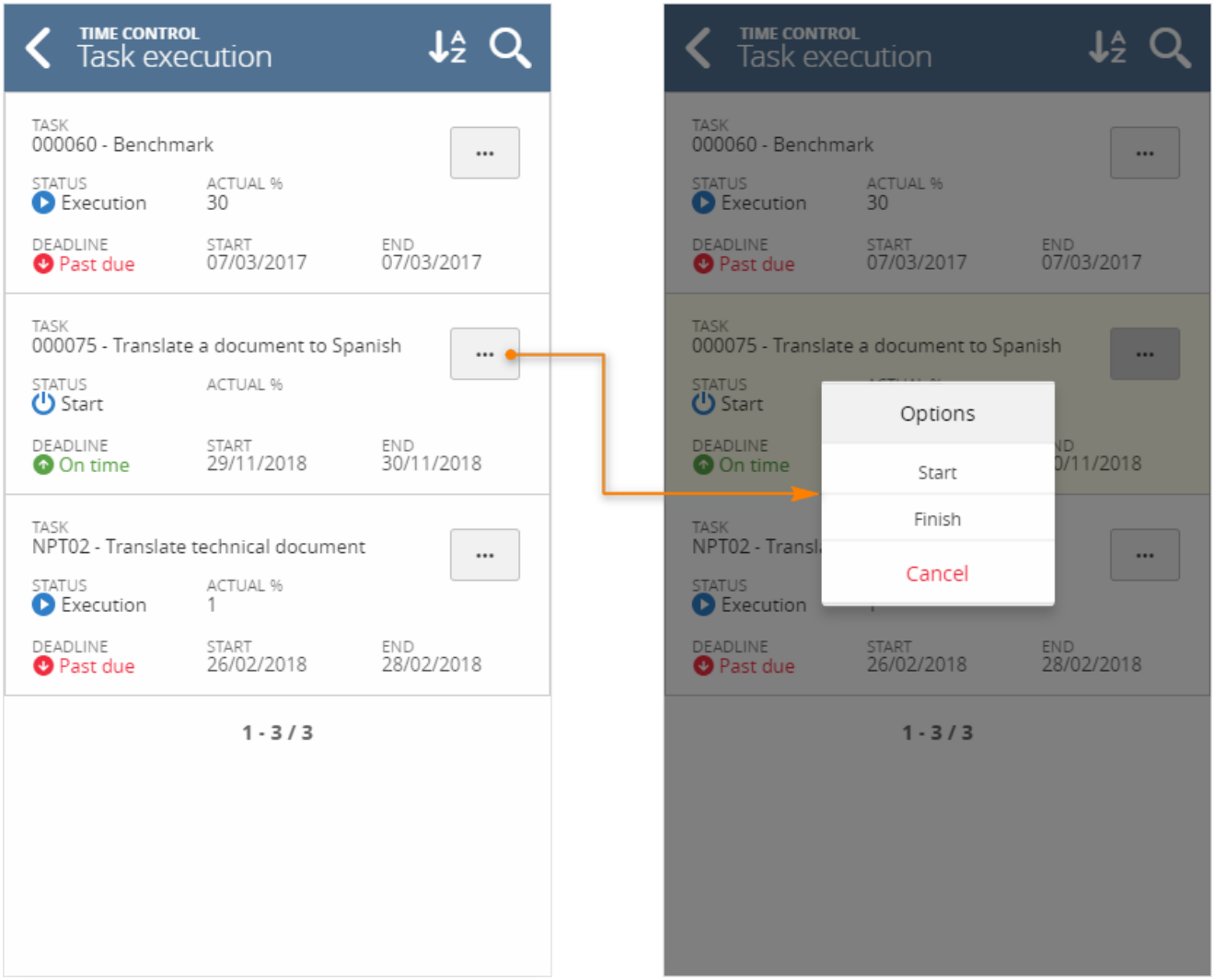
As soon as the asset is located (via camera or field selection), fill out the fields on the screen with information regarding the asset such as condition, location, and responsible user. If necessary, the activity has an option that allows you to disable the asset, making it mandatory for you to fill out the observations.

Click on the NEXT ASSET button to continue executing the assets inventory or click on the FINISH button to end the current asset verification and return to the inventory activity screen. Repeat this verification until every asset found in the location has been executed.

To end the inventory activity execution, click on the Finish button displayed on the activity screen. If there are assets with the "*To do*" status, the system will display a message informing that some assets still have not been read. Next, click on the Cancel button if you wish to continue the verification, or click on the Justify button for the assets that were not found to be listed. In this case, click on the asset from the listing and enter the observation regarding the closure of the asset verification on the screen that will open.

Executing a nonproject task

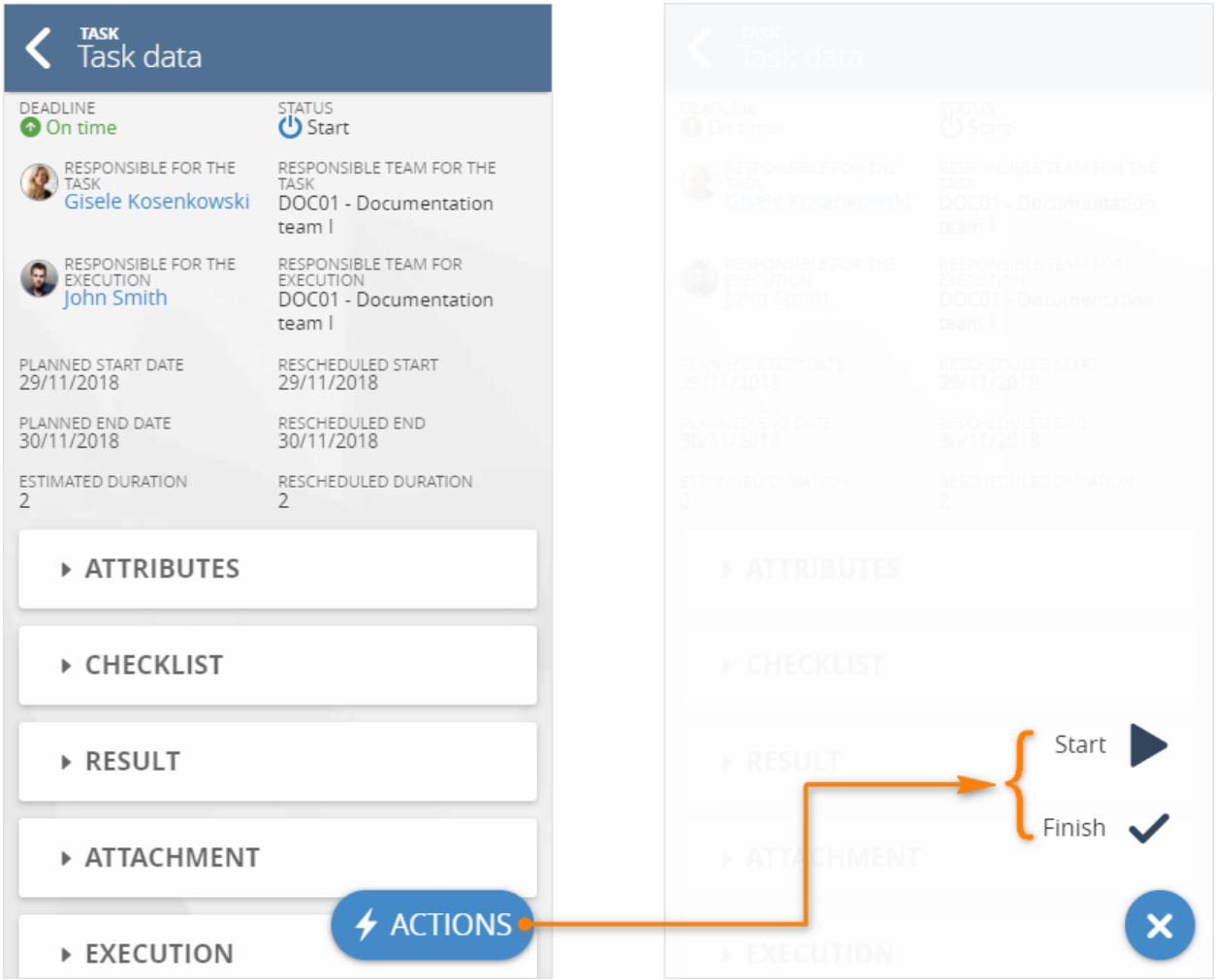
The system will display the "Task execution" task of SE Time Control if you are the executor or are part of the team responsible for executing it.



When clicking on the button located next to each task or clicking on the ACTIONS button within task data, the following options will be displayed:

- **Start:** This option will only be displayed to the tasks with the "Start" status. If this option is accessed, the task will be started, having today as the start date.

- **Finish:** This option will be displayed to all tasks. If this option is accessed, the task will be closed, having today as the end date.



When you access the task, the task data will be displayed, allowing for the execution attributes, checklist, result, attachments and data to be filled out.

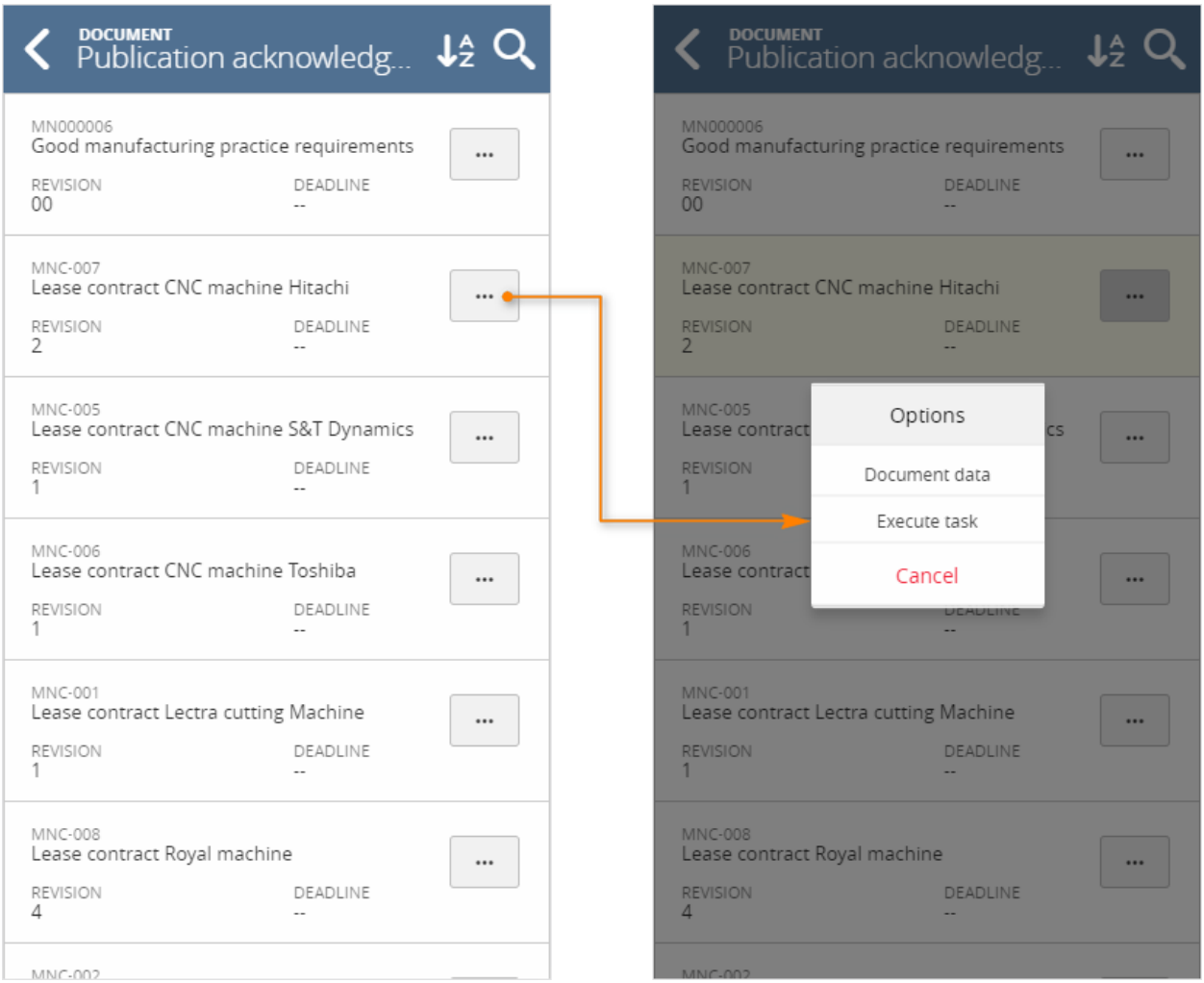
In the "*Result*" section it will be possible to fill out information regarding the results obtained with the task execution such as Lessons learned, Objectives achieved, Benefits achieved and Reason for delay. After filling out the information, click on the Save button.

In the "*Execution section*" it will be possible to enter the Start and End date for the task, as well as the execution percentage. The

section also has a field that allows for the execution fields to be automatically filled out with the planned or rescheduled dates.

Executing a publication acknowledgment

When accessing the "Publication acknowledgment" task, the system will display the documents that have been revised and that you have the "Acknowledgment" control.



When clicking on the button located next to each document, the following options are displayed:

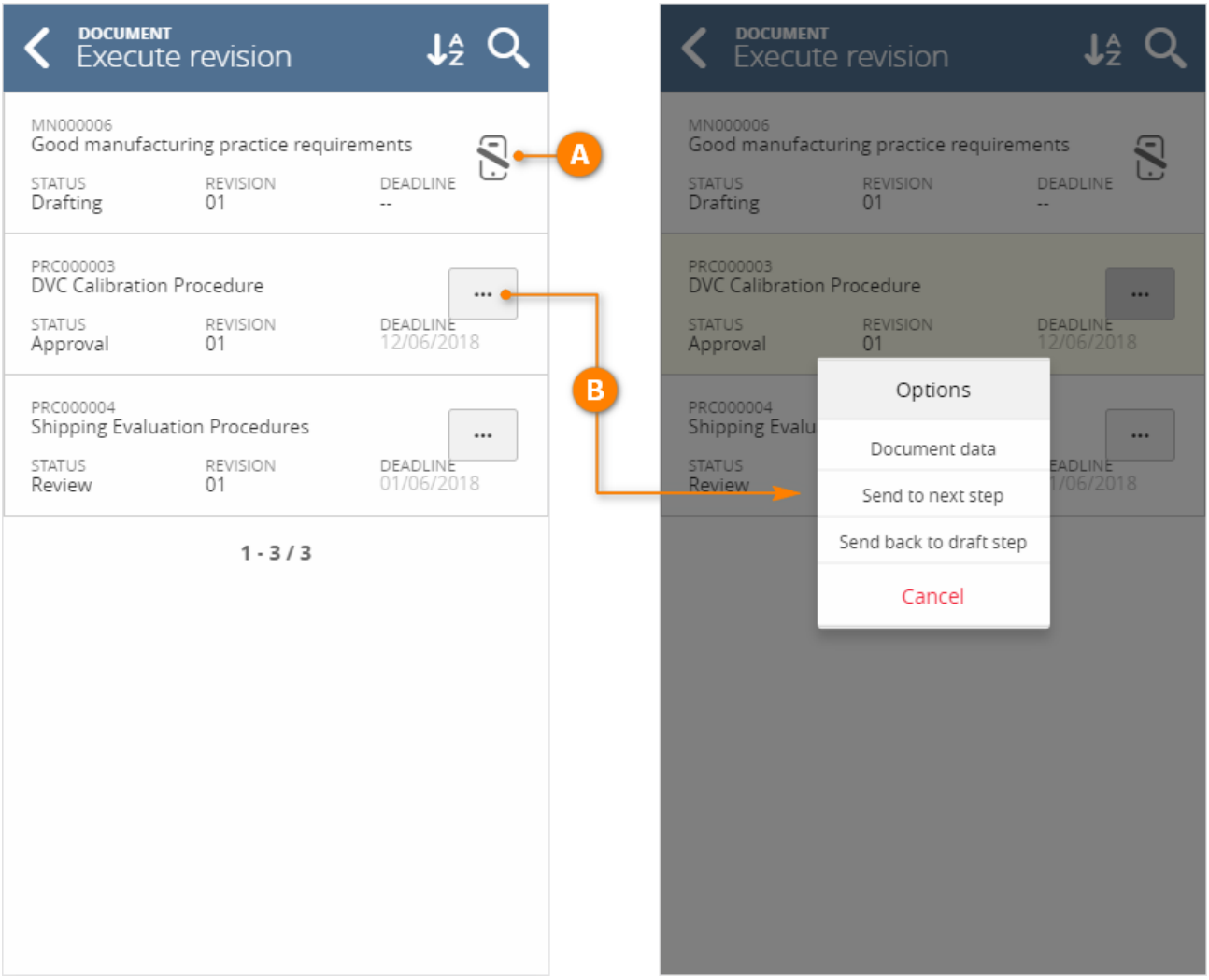
- **Document data:** In this option, the system will display some information about the document. Below the document data, the electronic files of the document are displayed in the form

of a button. Click on the files to view them. To view the electronic file, a download will be performed for the opening of the file, that is, to view the document, you need to have the "View" and "Save locally" permission.

- **Execute task:** When clicking on this option, the task is executed and the document is no longer displayed in this list. It may be required to view the document when you run the task if this setting is set in the "General parameters" of SE Document.

Executing a document revision

The system will display the "Execute revision" task from SE Document if you are the responsible or part of a group responsible for executing a revision step of the document. All the revisions of all steps will be displayed by the system, but it will only be possible to perform revisions that are in the review, approval and release step.



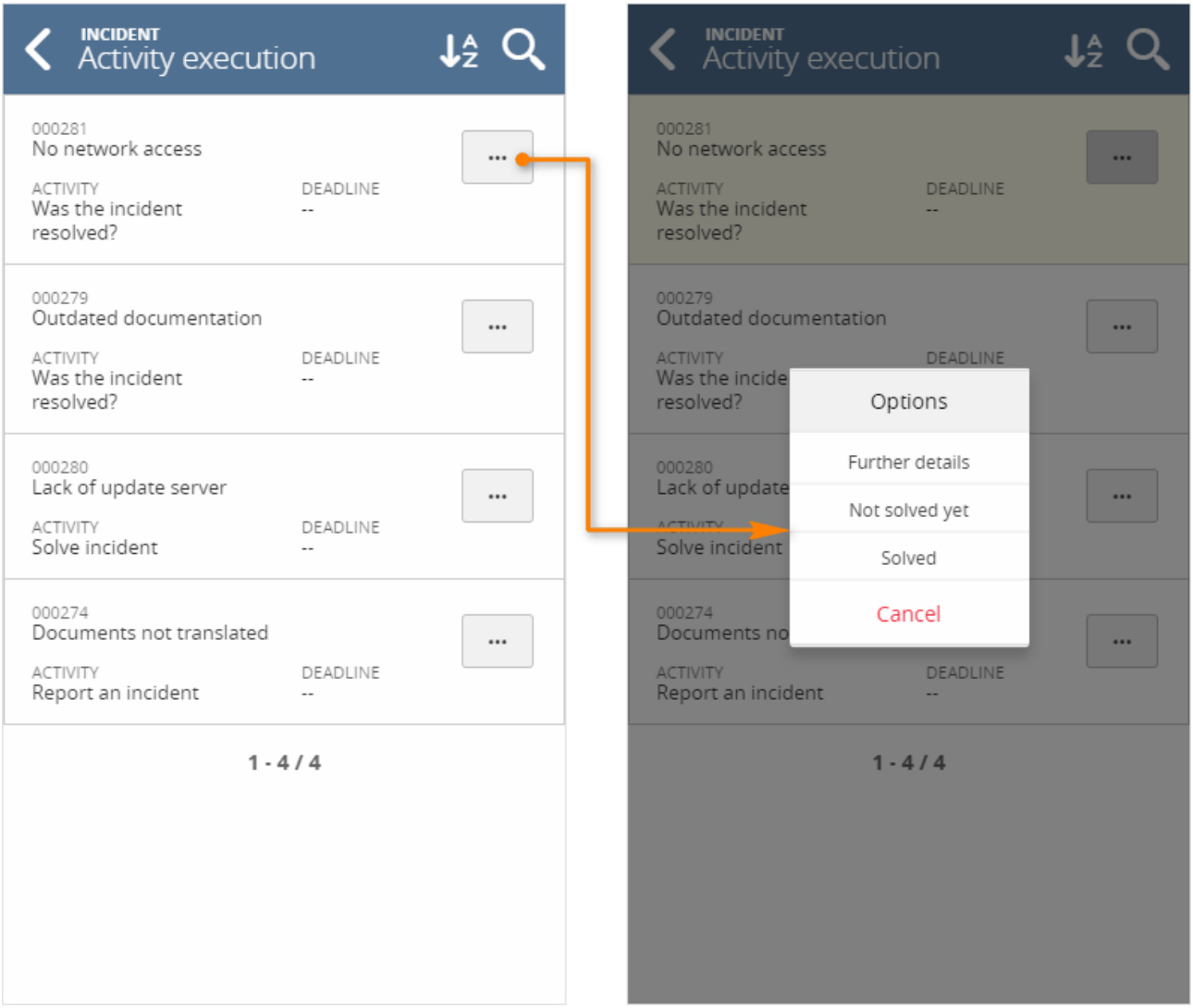
A This icon is displayed for tasks that are being revised through a Workflow or that, when it is ISO9000, are in the draft or closure step. This icon indicates that the task will not be able to run in the mobile version.

B When clicking on the button located next to each task, the following options will be displayed:

- **Document data:** In this option, the system will display some information about the document. Below the document data, the electronic files of the document are displayed in the form of a button. Click on the files to view them. To view the electronic file, a download will be performed for the opening of the file, that is, to view the document, you need to have the "View" and "Save locally" permission.
- **Send to next step:** When clicking on this option, the task will be executed and the revision will be sent to the next step. It may be required to view the document when you run the task if this setting is set in the General parameters of SE Document. It will not be possible to send it to the next step when there are no checklists associated with the step you are executing.
- **Send back to draft step:** When clicking on this option, the task will be performed and the revision will be returned to the draft step. If the setting is configured to obligate critiques to be entered, it will not be possible to return to the mobile version, as it will be required to report a critique for the cycle and this action can only be done in the desktop version.

Executing an incident activity

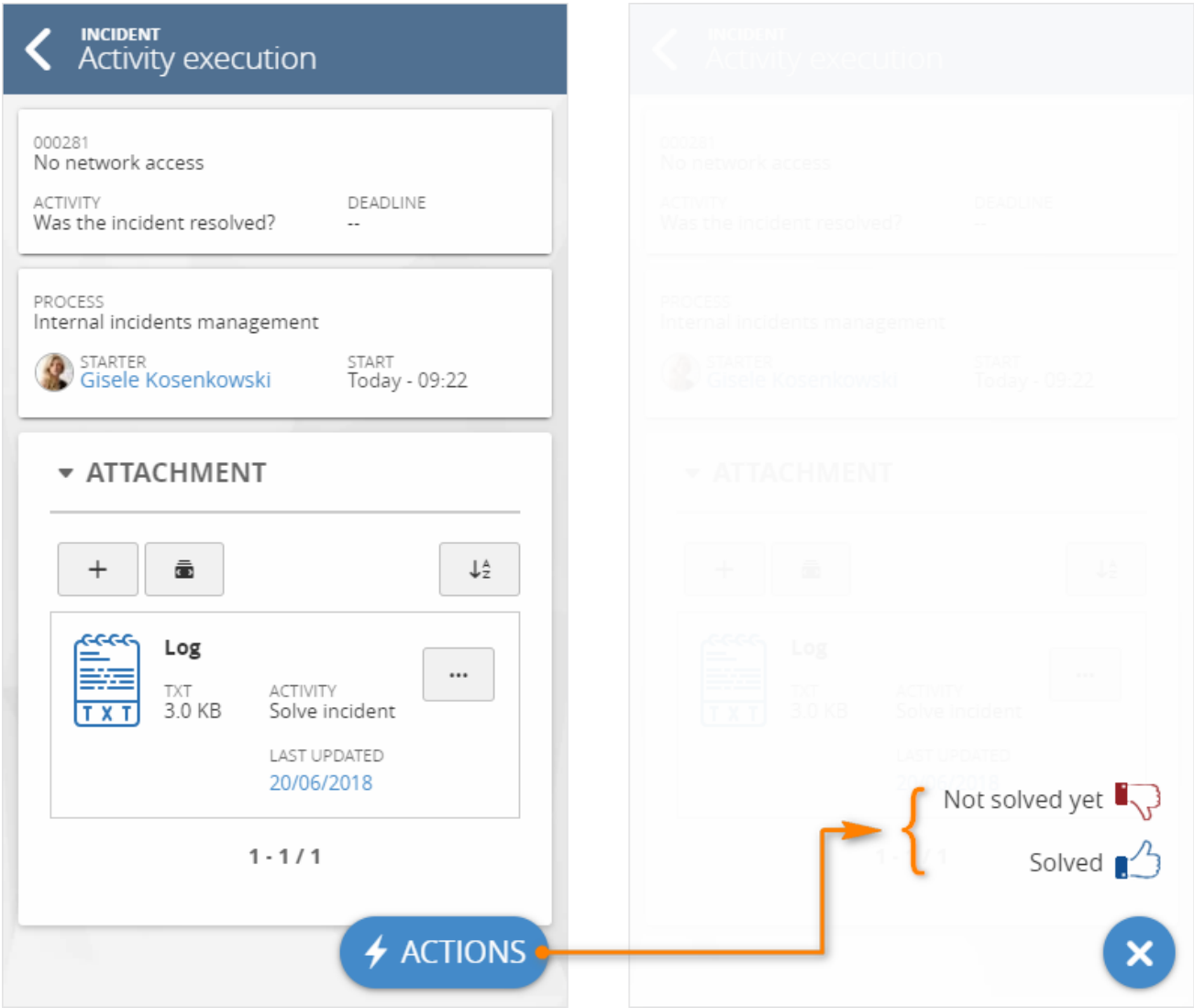
The system will display the "Activity execution" task of SE Incident, if you are the specific executor or part of the department, team or functional role responsible for executing the incident activities.



When clicking on the button located next to each task, the following options will be displayed:

- **Further details:** If this option is accessed, the system will display the incident activity data.
- **Activity actions:** The system will display, as options, all actions that can be performed in the activity. When you access one of the options, the activity will be executed only if all the prerequisites for the execution of the activity are entered.

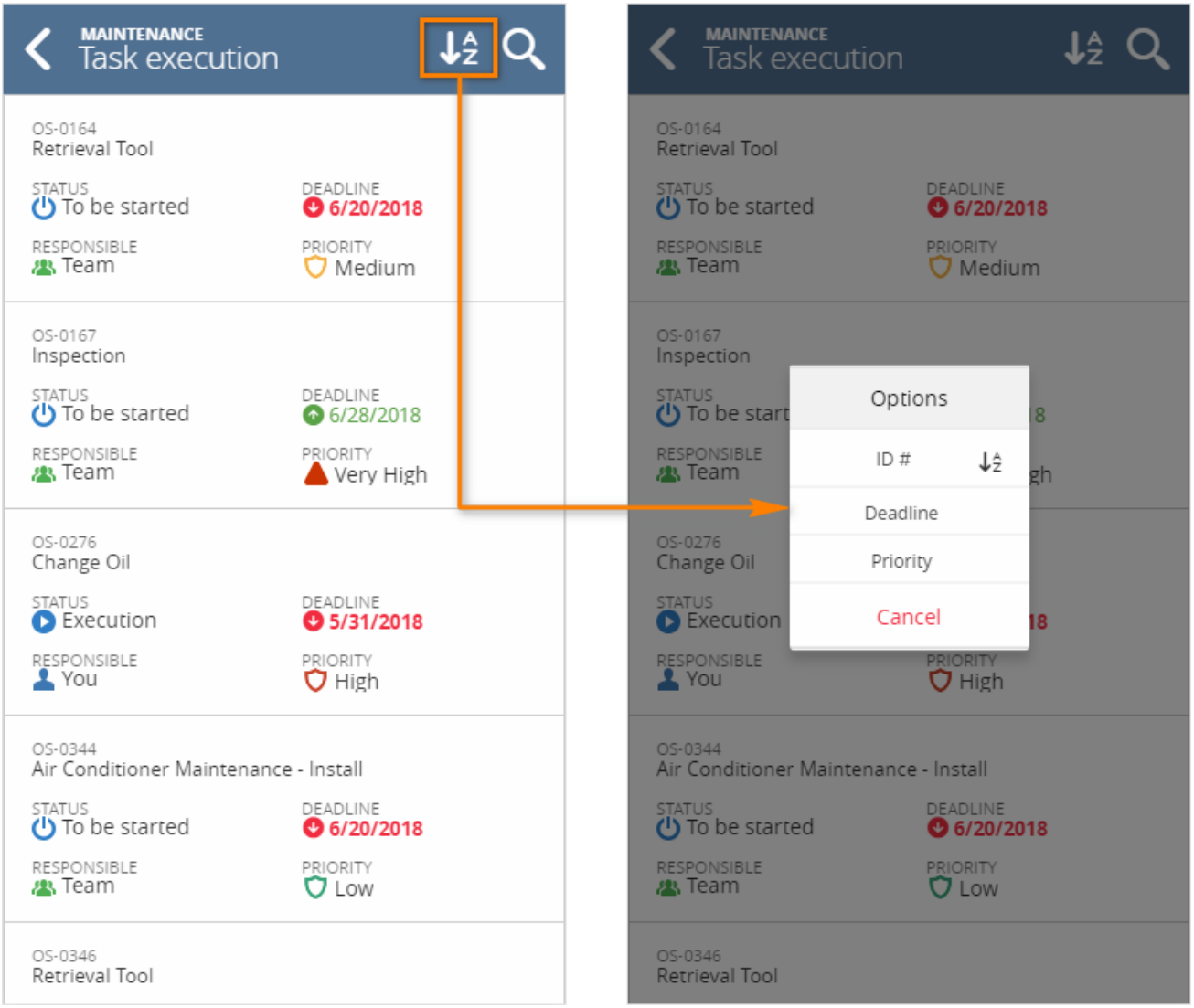
When the "Further details" option is displayed, the system will display the activity data, allowing you to fill in forms, attributes, checklist, attachments, as well as perform activity actions:



Executing a maintenance activity

The system will display the "Activity execution" task of SE Maintenance, if you are the executor or are part of the team responsible for carrying out maintenance activities.

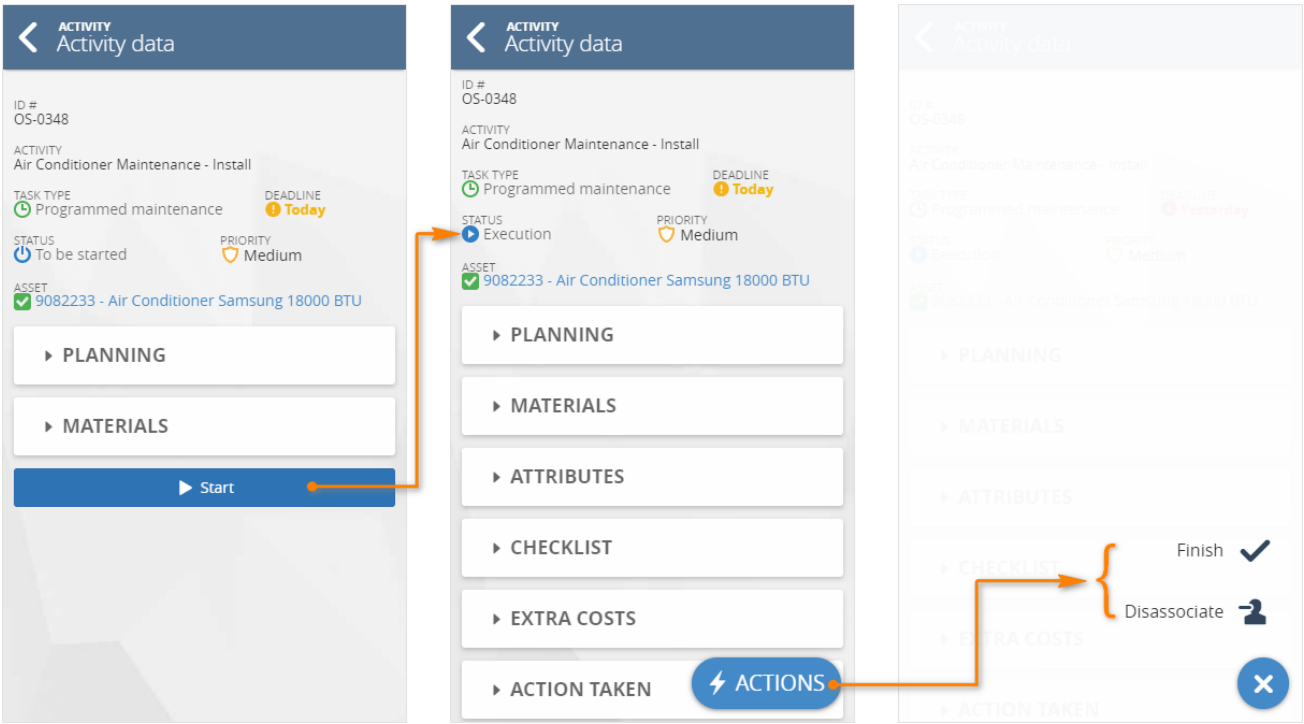
In the list of activities, it is possible to identify the status, deadline, responsible and the priority of each activity. Through the sorting button, it is possible to sort the activities by the ID #, deadline, or priority.



When a maintenance activity that is with the "To be started" status is opened, in will be possible to, in addition to viewing the general data of activity, view the maintenance planning information and

check the materials (supplies) programmed for the execution of the activity.

If the activity is under execution, it will be possible to fill out attributes, checklists, extra costs (as long as in the activity it has been programmed) materials and action taken (including images), as well as to add attachments and enter time.

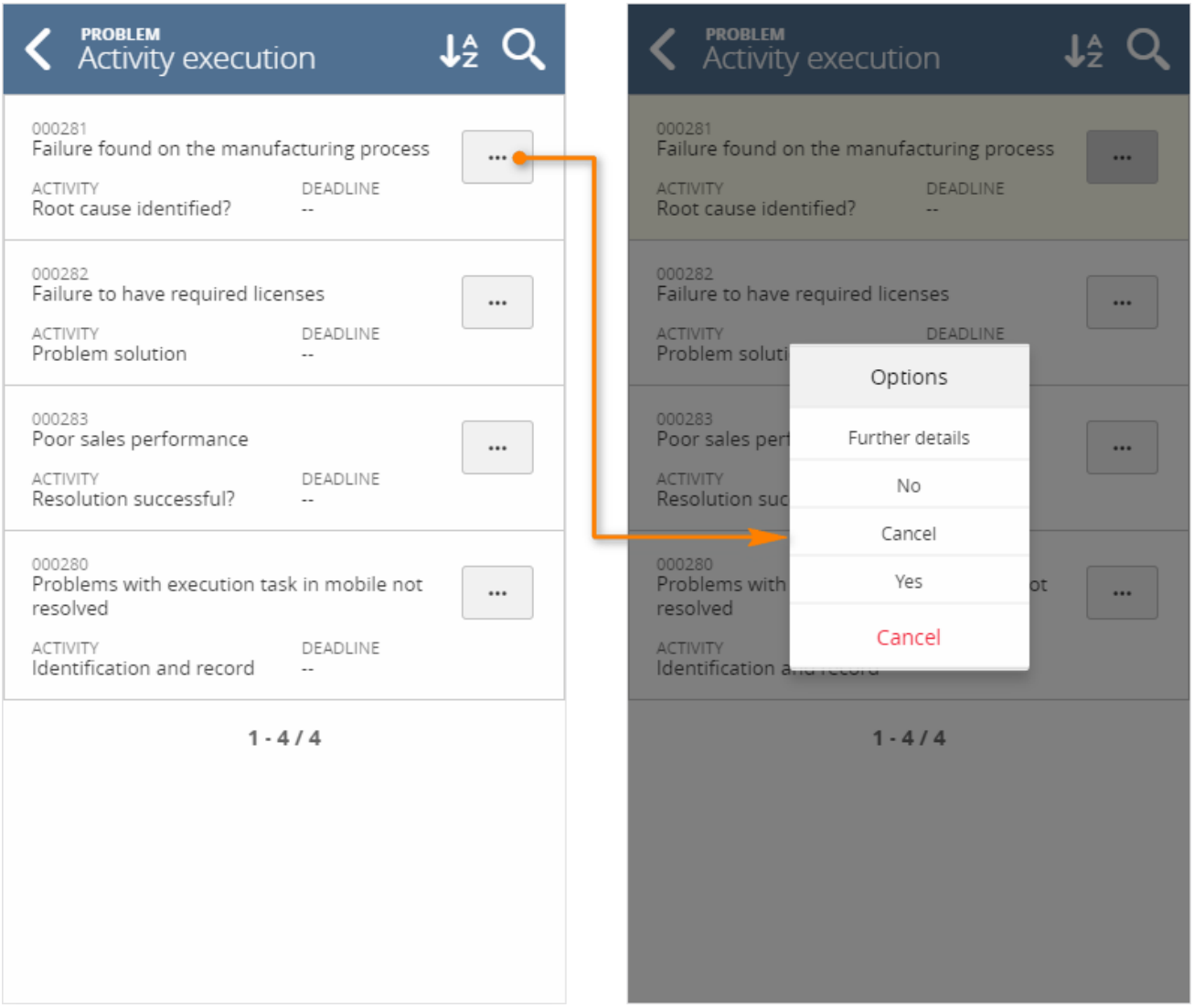


The assets being maintained will also be displayed along with their locations. When you click on the asset link, the system will display the same data screen. When there are multiple assets, the system will display a list, allowing you to select the data from which asset will be displayed.

By clicking on the "Actions" button of an activity that is in progress, it will be possible to finish the execution or disassociate the logged-on user activity.

Executing a problem activity

The system will display the "Activity execution" task of SE Incident, if you are the specific executor or part of the department, team or functional role responsible for executing the problem activities.

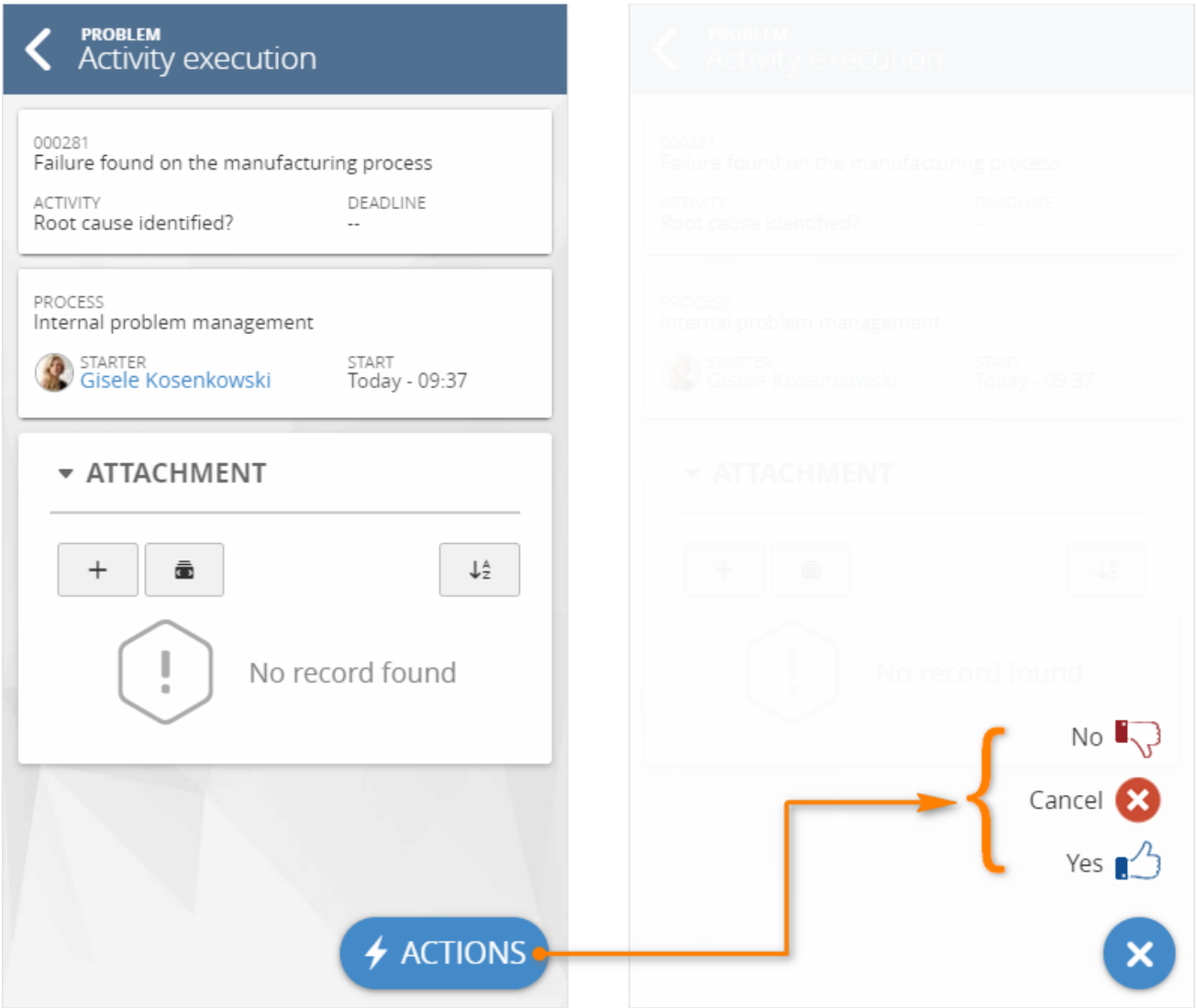


When clicking on the button located next to each task, the following options will be displayed:

- **Further details:** If this option is accessed, the system will display the problem activity data.
- **Activity actions:** The system will display, as options, all actions that can be performed in the activity. When you access one

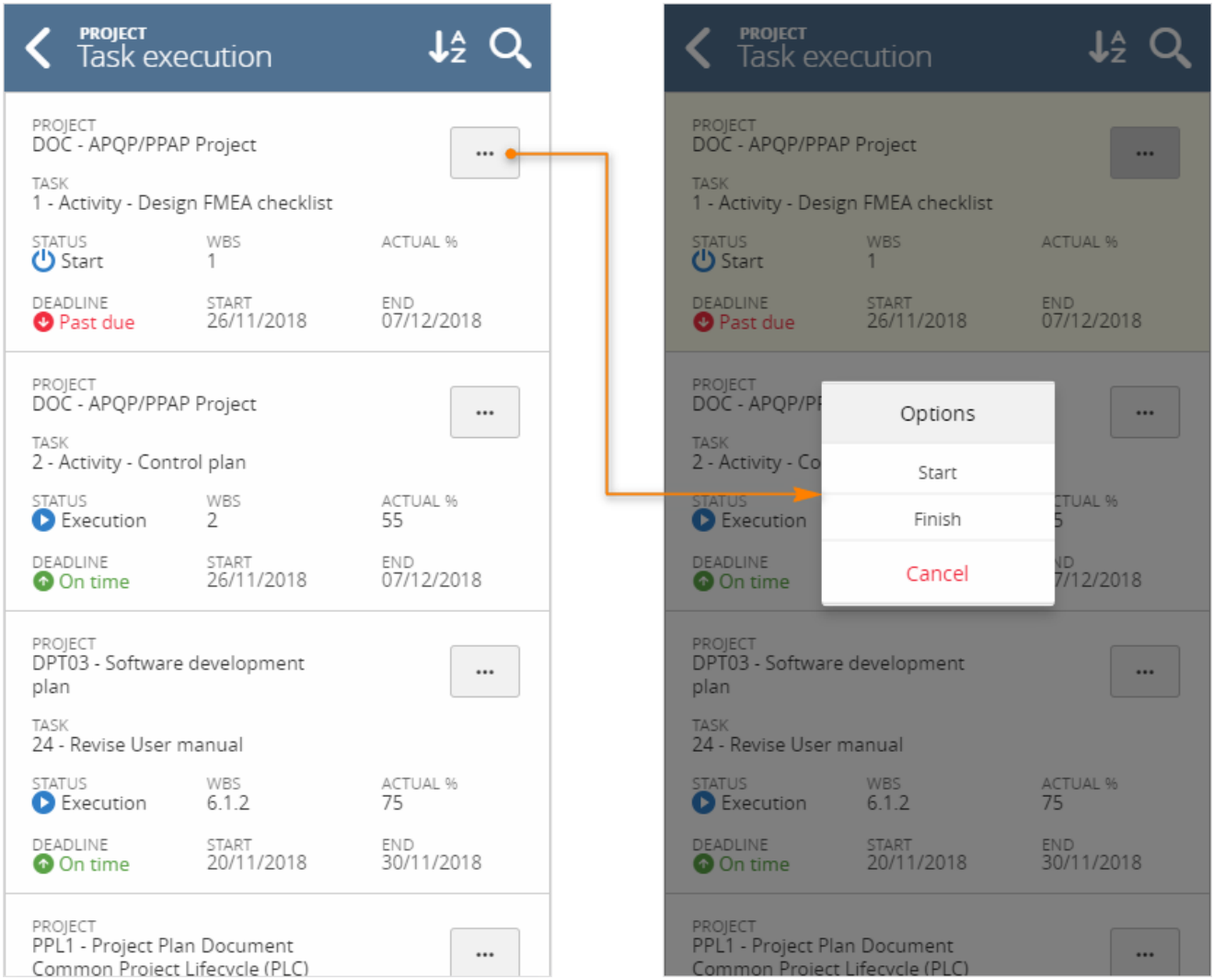
of the options, the activity will be executed only if all the prerequisites for the execution of the activity are entered.

When the "Further details" option is displayed, the system will display the activity data, allowing you to fill in forms, attributes, checklist, attachments, as well as perform activity actions:



Executing project tasks

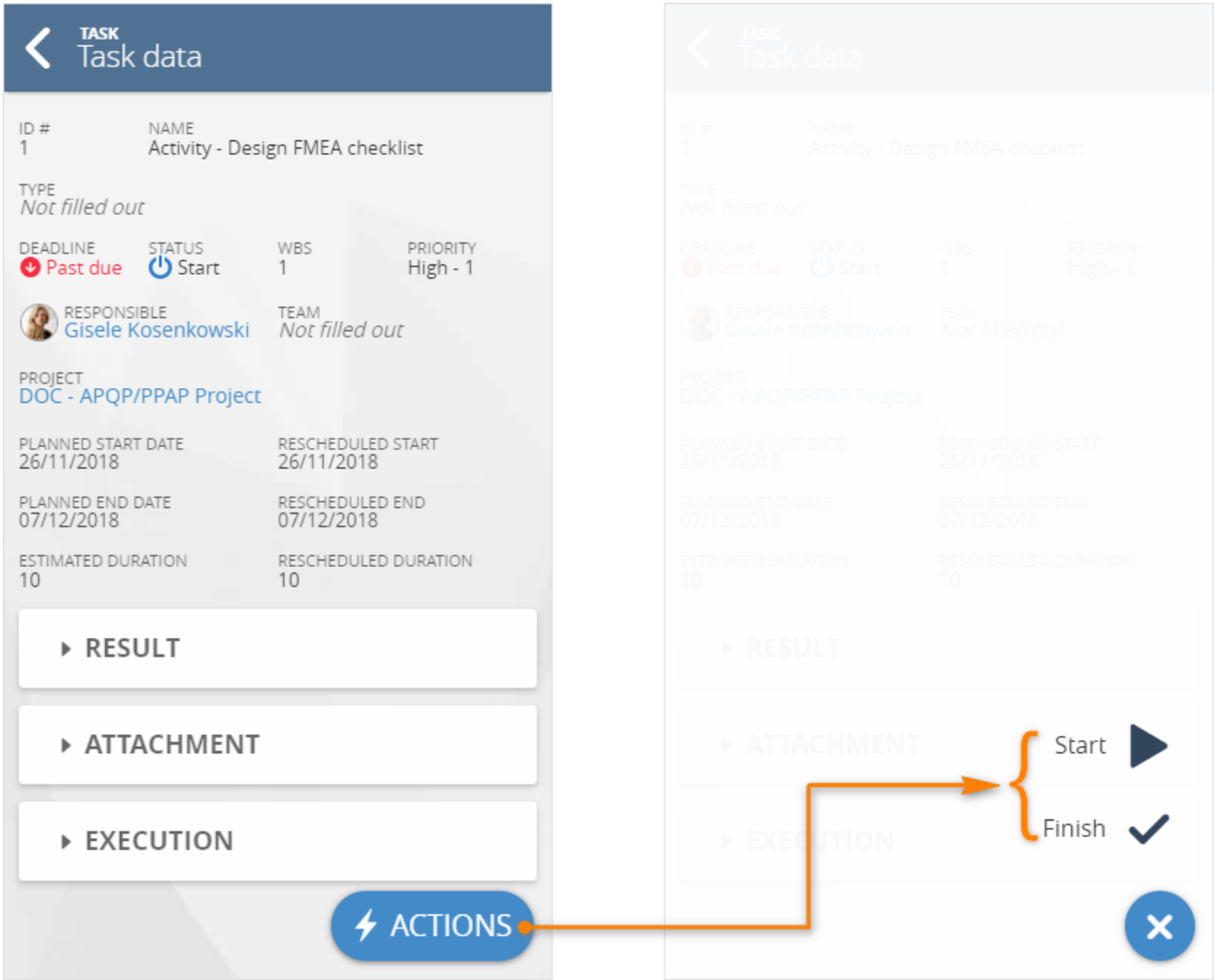
The system will display the "Task execution" task of SE Project if you are the executor or are part of the team responsible for carrying out the task.



When clicking on the button located next to each task or clicking on the ACTIONS button within task data, the following options will be displayed:

- **Start:** This option will only be displayed to the tasks with the "Start" status. If this option is accessed, the task will be started, having today as the start date.

- **Finish:** This option will be displayed to all tasks. If this option is accessed, the task will be closed, having today as the end date.



When you access the task, the task data will be displayed, allowing for the execution attributes, checklist, result, attachments and data to be filled out.

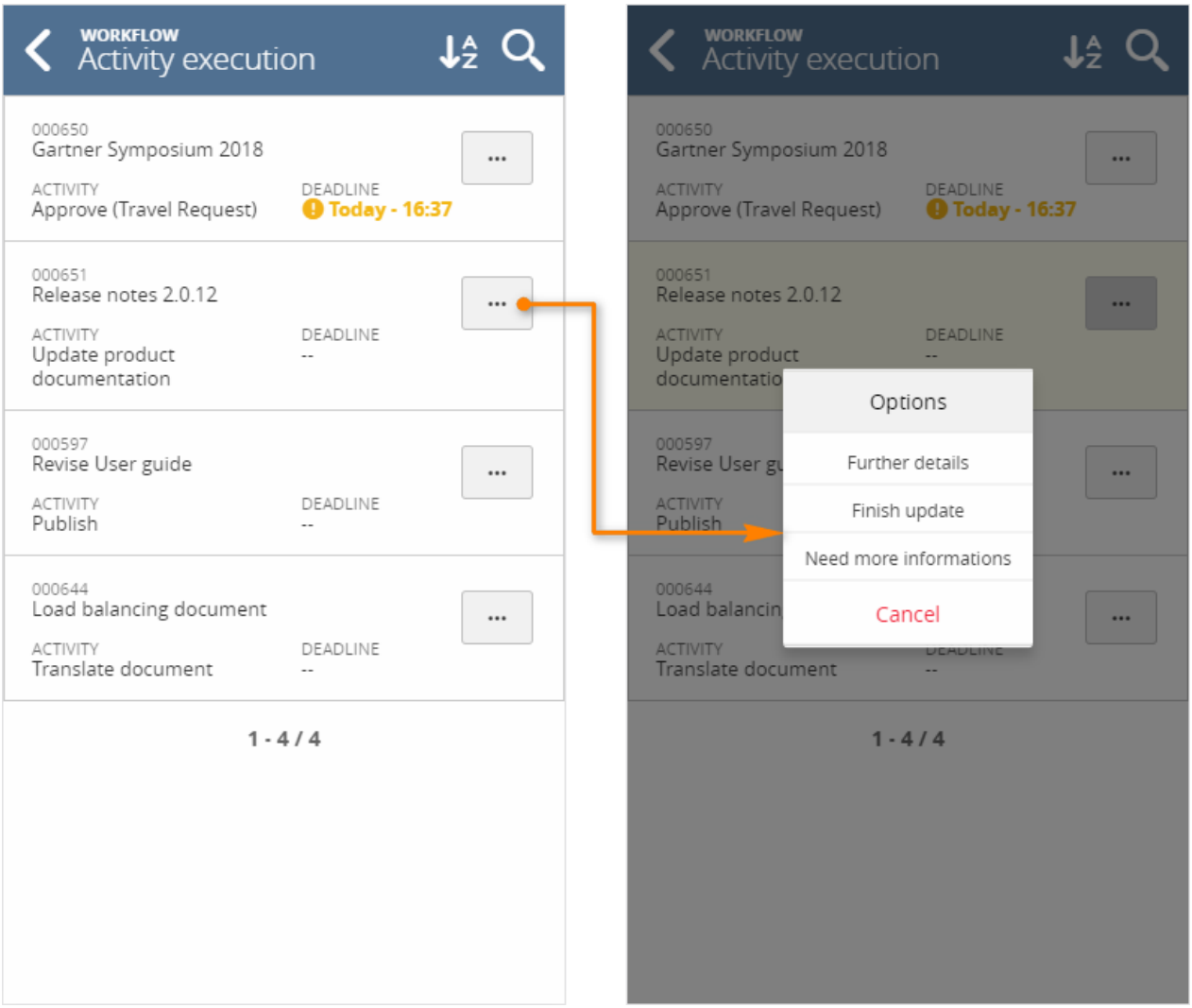
In the "*Result*" section it will be possible to fill out information regarding the results obtained with the task execution such as Lessons learned, Objectives achieved, Benefits achieved and - Reason for delay. After filling out the information, click on the Save button.

In the "*Execution section*" it will be possible to enter the Start and End date for the task, as well as the execution percentage. The

section also has a field that allows for the execution fields to be automatically filled out with the planned or rescheduled dates.

Executing a workflow activity

The system will display the "Activity execution" task of SE Workflow if you are the specific executor or part of the department, team or functional role responsible for executing the process activities.

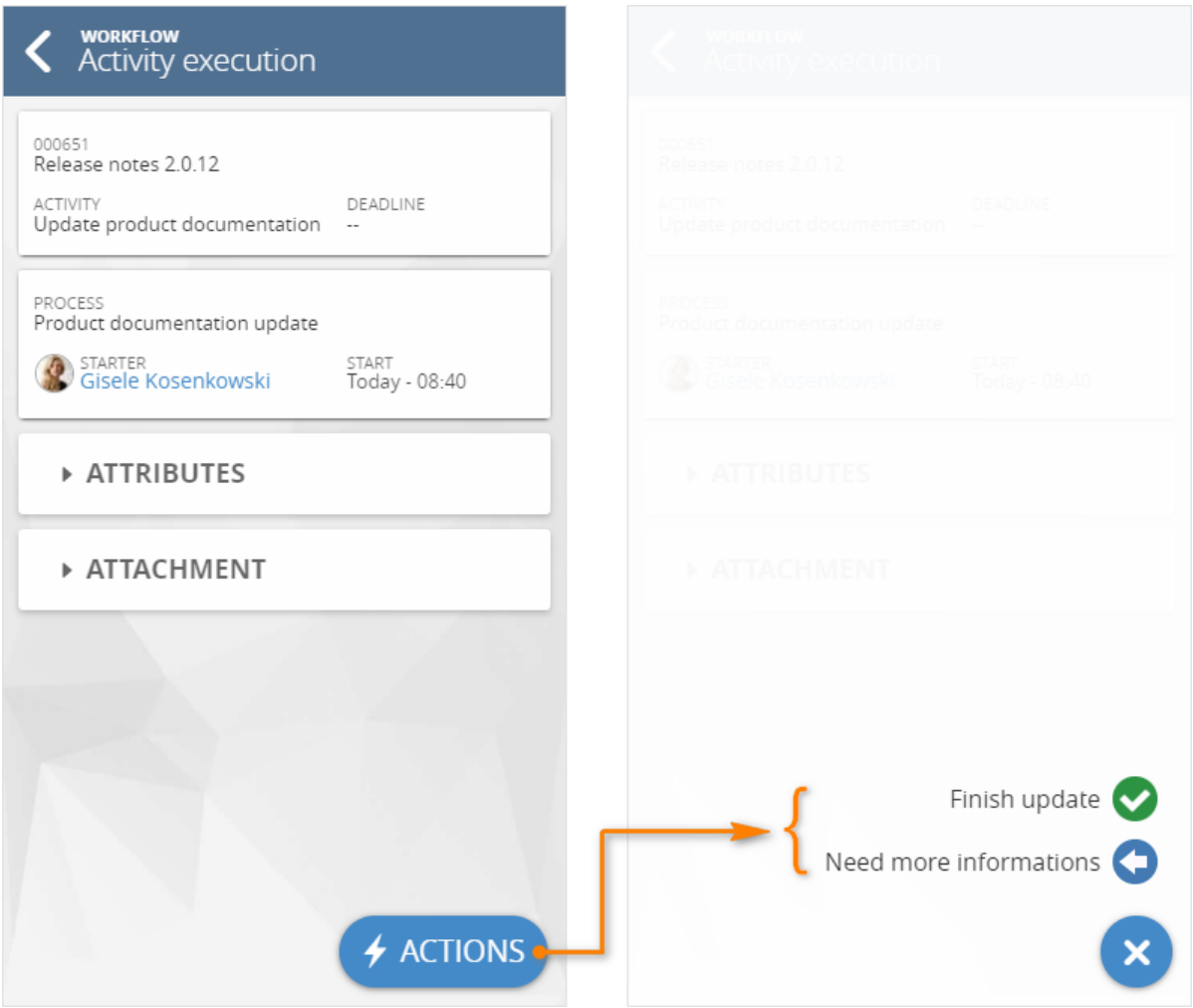


When clicking on the button located next to each task, the following options will be displayed:

- **Further details:** If this option is accessed, the system will display the workflow activity data.

- **Activity actions:** The system will display, as options, all actions that can be performed in the activity. When you access one of the options, the activity will be executed only if all the prerequisites for the execution of the activity are entered.

When the "Further details" option is displayed, it is possible to fill out forms, attributes, checklist, and attachments, as well as to perform activity actions:

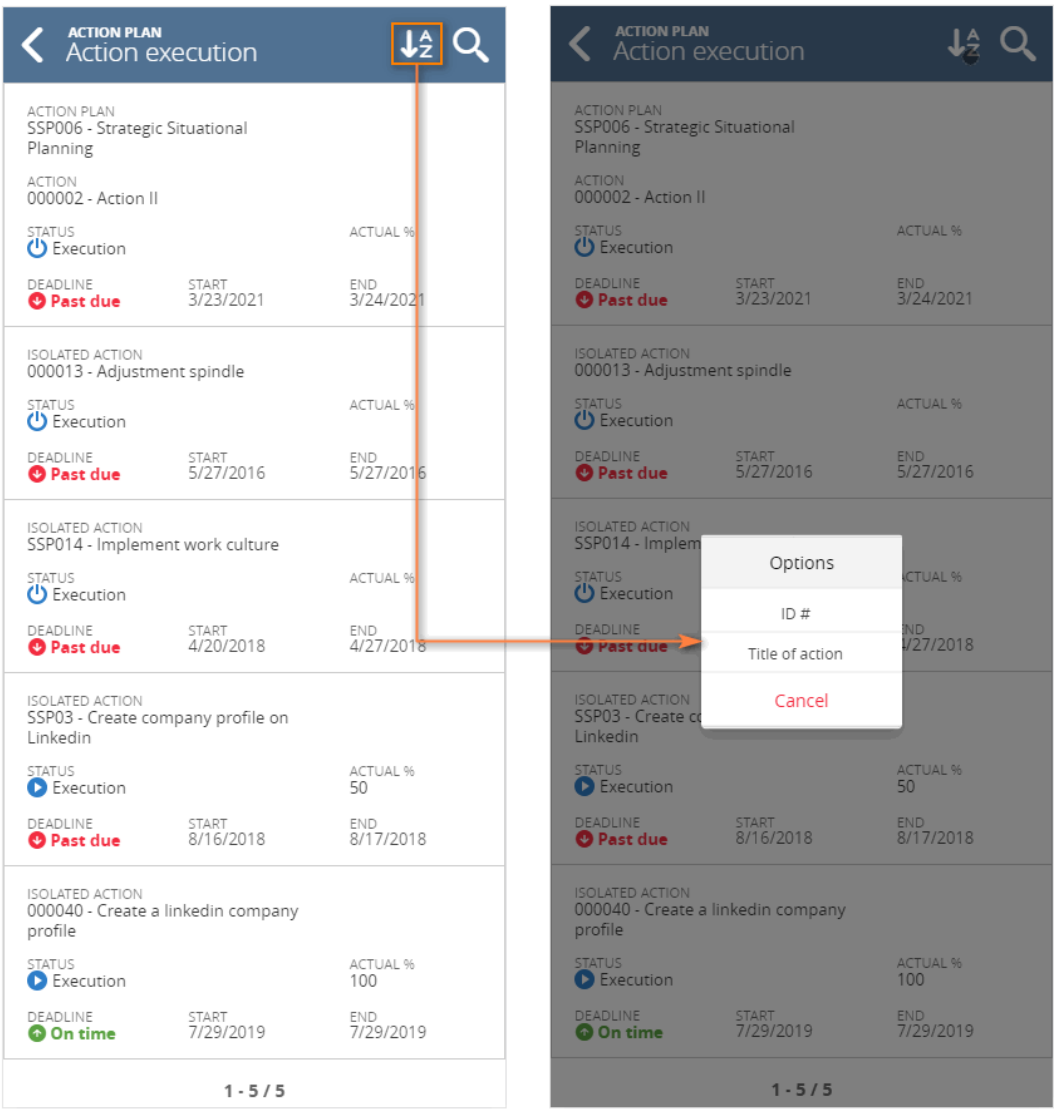


Executing an action

The system will display the “Action execution” task of SE Action Plan if you are the executor or are part of the team responsible for the execution of the action plan/isolated action.

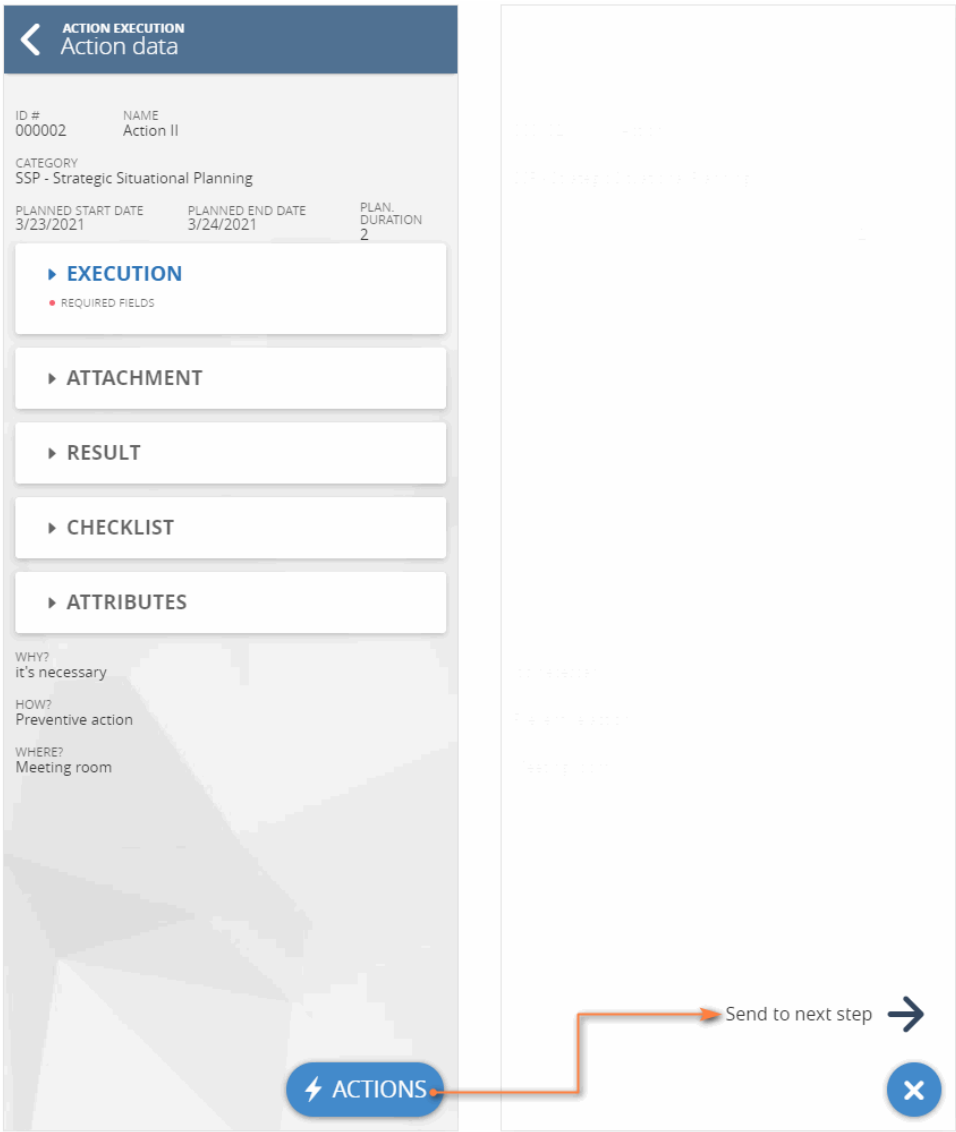
In the list of tasks, it is possible to identify the status, deadline, conclusion percentage, and the start and end dates of each action plan/isolated action.

Through the sorting button, it is possible to sort the tasks by the ID # or title of the action plan/isolated action.



When clicking on the **ACTIONS** button within task data, the following option will be displayed:

- **Send to next step:** When clicking on this option, the task will be executed and the action plan/isolated action will be sent to the next step. It may be mandatory to fill out the fields in the "*Execution*" section.



When you access the task, the activity data will be displayed, allowing for the execution data, attributes, checklist, result, and - attachments to be filled out.

In the "*Execution*" section it will be possible to enter the Start and End date for the task, as well as the cost generated with the execution and the execution percentage. The section also has a field that allows for the execution fields to be automatically filled out with the planned or rescheduled dates.

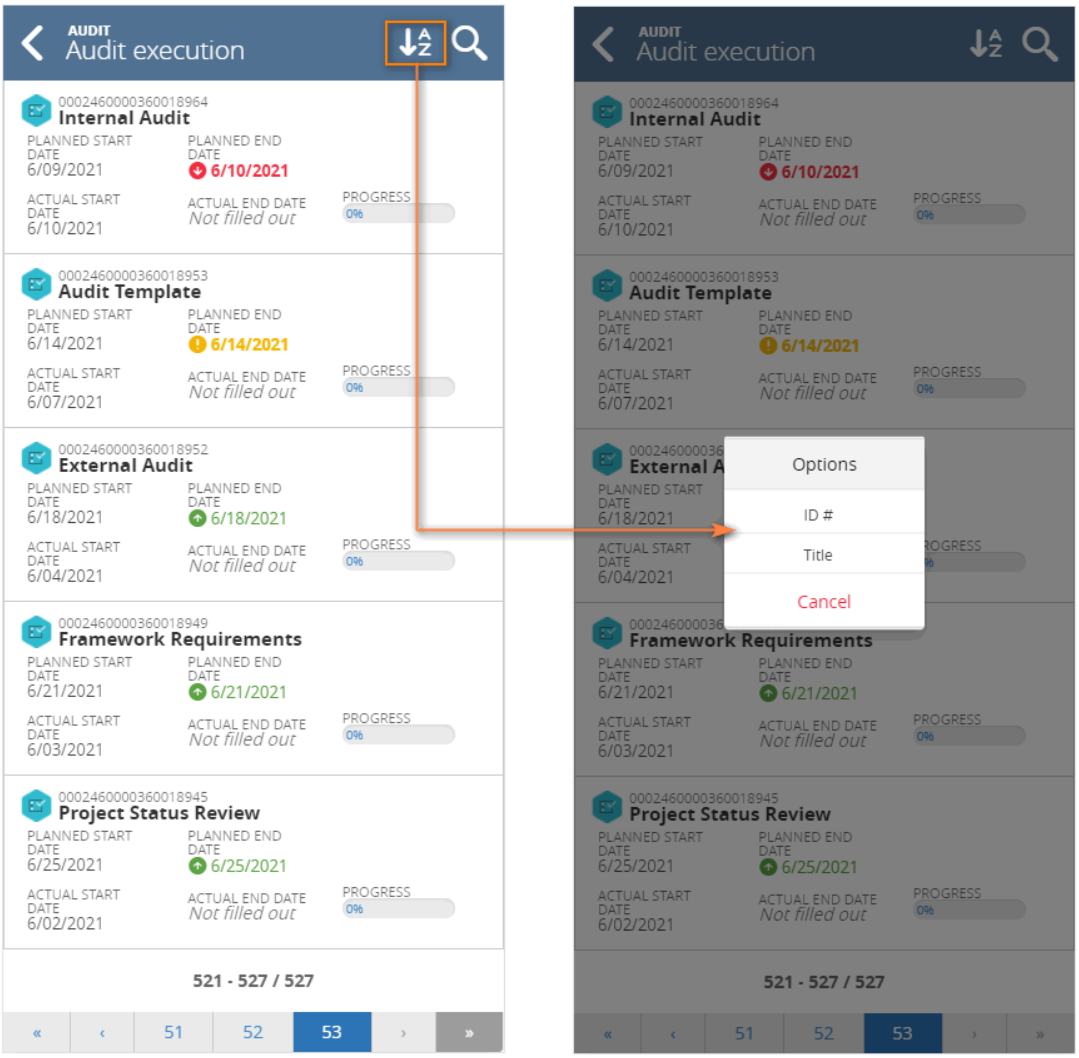
In the "*Result*" section it will be possible to fill out information regarding the results obtained with the action execution such as Lessons learned, Objectives achieved, Benefits achieved and

Reason for delay. After filling out the information, click on the Save button.

Executing an audit

The "Audit execution" task of SE Audit will be displayed if you are a member of the team responsible for the audit, auditor, or lead auditor, as defined in the category.

Through the sorting button, it is possible to sort the tasks by the ID # or audit title.

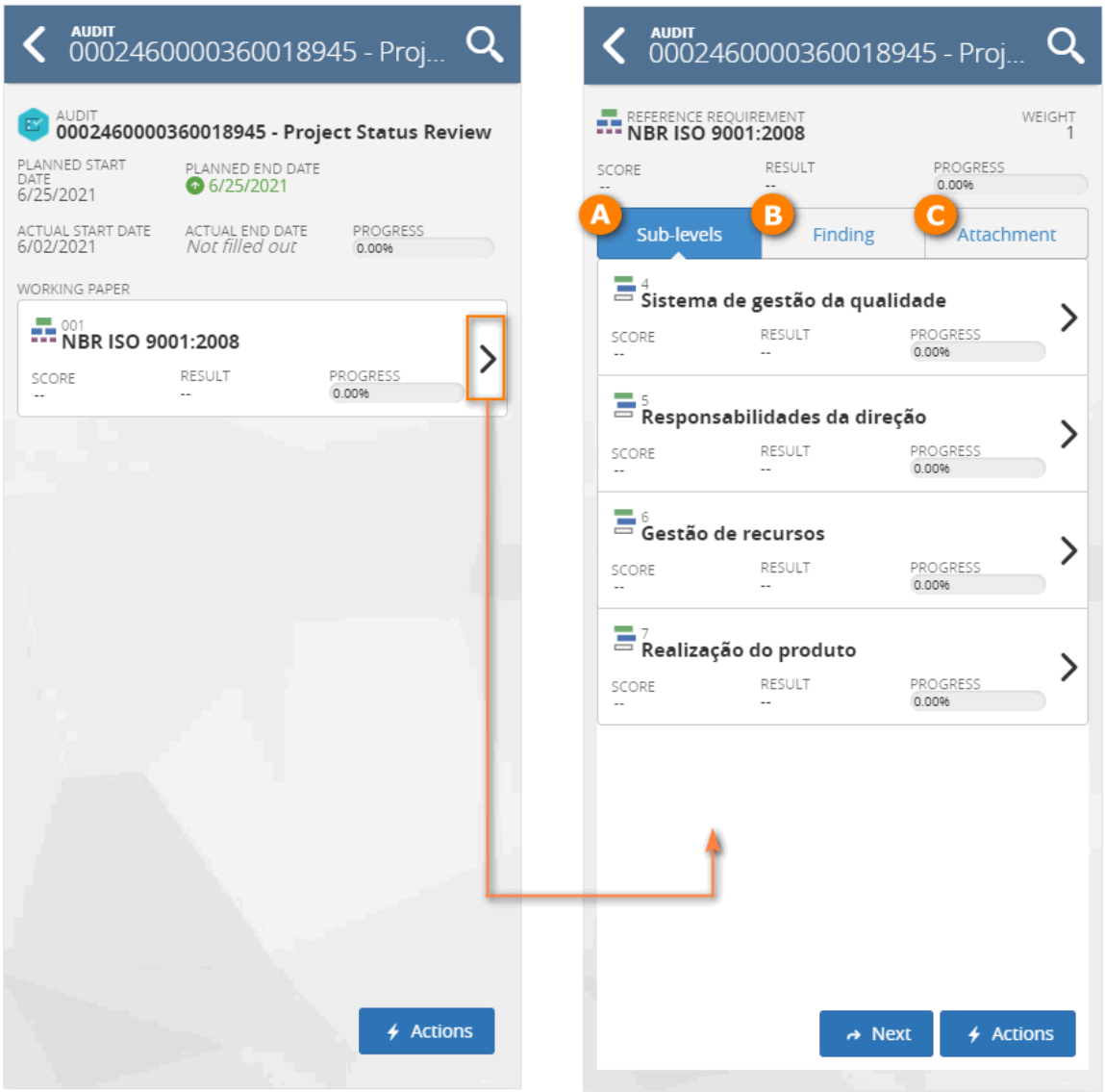


In the list of tasks, it is possible to identify the planned and actual start and end dates of the audit. The right side of the listing displays the progress percentage of each audit.

When clicking on the **ACTIONS** button within task or requirement data, the following option will be displayed:

- **Send to next step:** When clicking on this option, the task will be executed and the audit will be sent to the next step.

By accessing the task, it will be possible to view the result next to the progress. It will also be possible to open the audit to check and evaluate the requirements under the responsibility of the auditor. The screen will be divided in three sections:

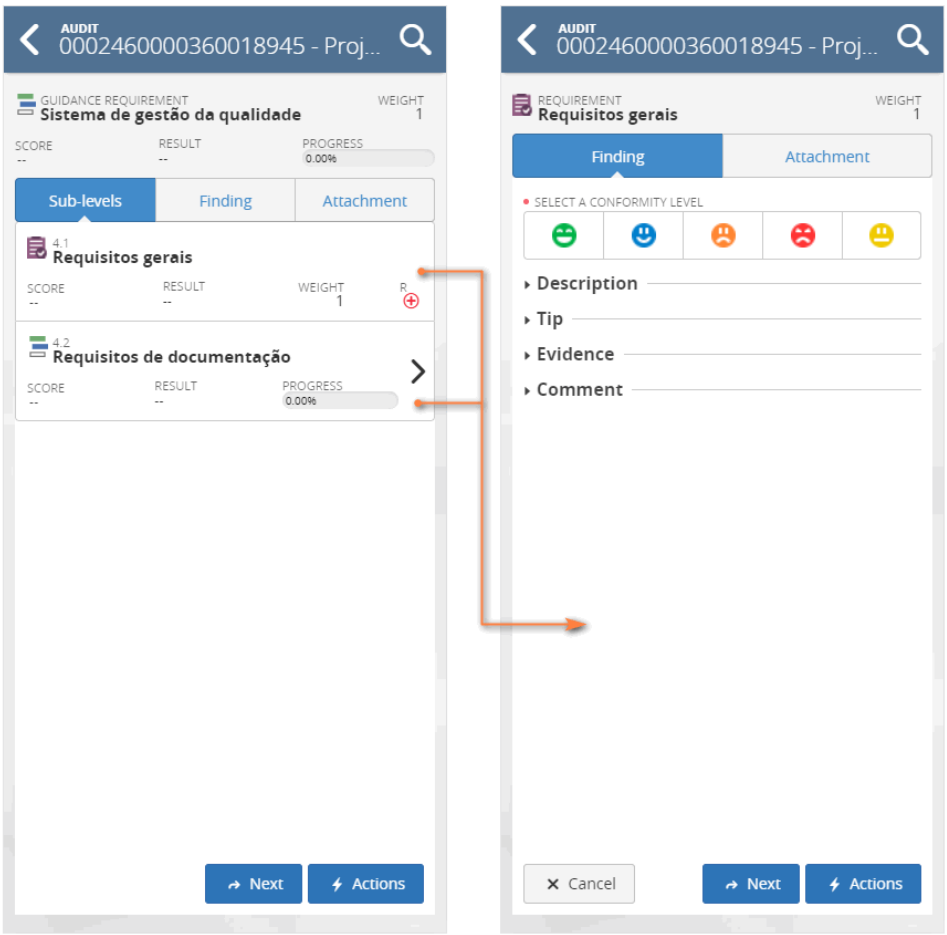


A *Sub-levels*: Displays the audit requirement list, their respective scores, conformity levels, and results, as well as their weights.

B *Finding*: Allows adding comments to the audit.

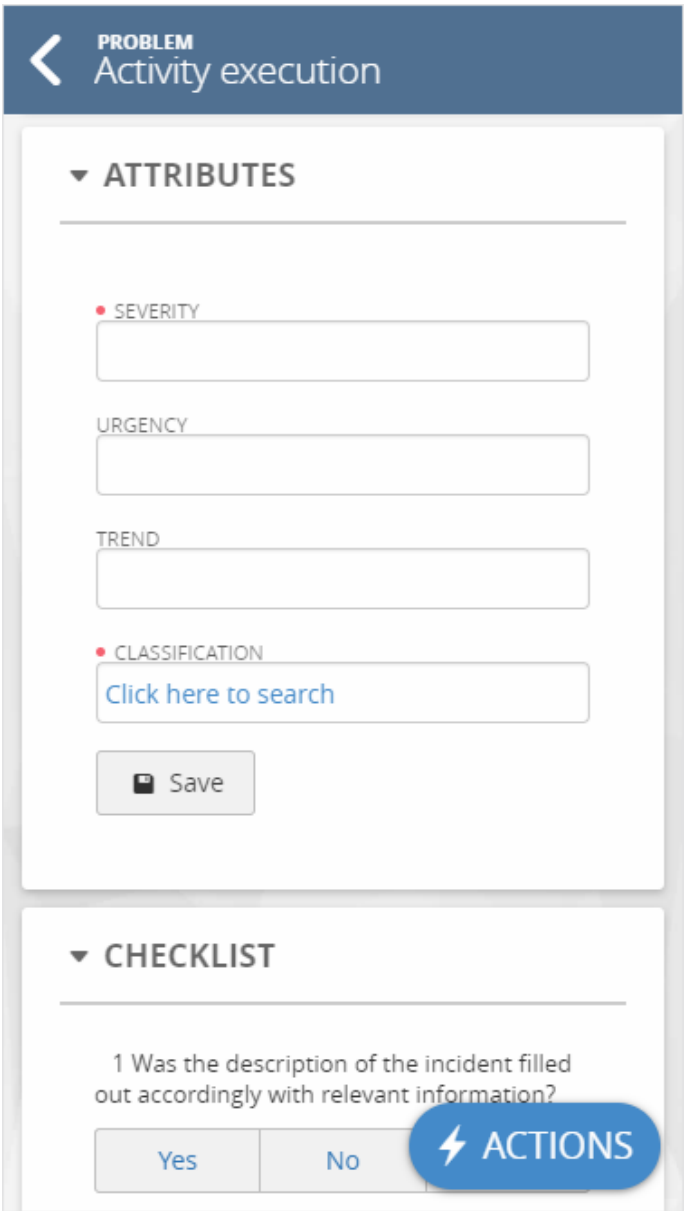
C *Attachment*: Allows adding attachments to the audit.

When opening an audit requirement, it will be possible to add, in the **Finding** section, **the** conformity level, value, description, hint, evidence, and comment. It will also be possible to add, in the **Attachment** section, a file to complement the requirement. Such information will be visible on the main screen of the audit in question. It may be required to fill out the *Conformity level* and *Value* fields of the requirements for the audit to be sent to the next step.



At the bottom of the screen, the **Next** button, next to the **Actions** button, will allow going to the next requirement on the list without leaving the current screen.

Filling in attributes

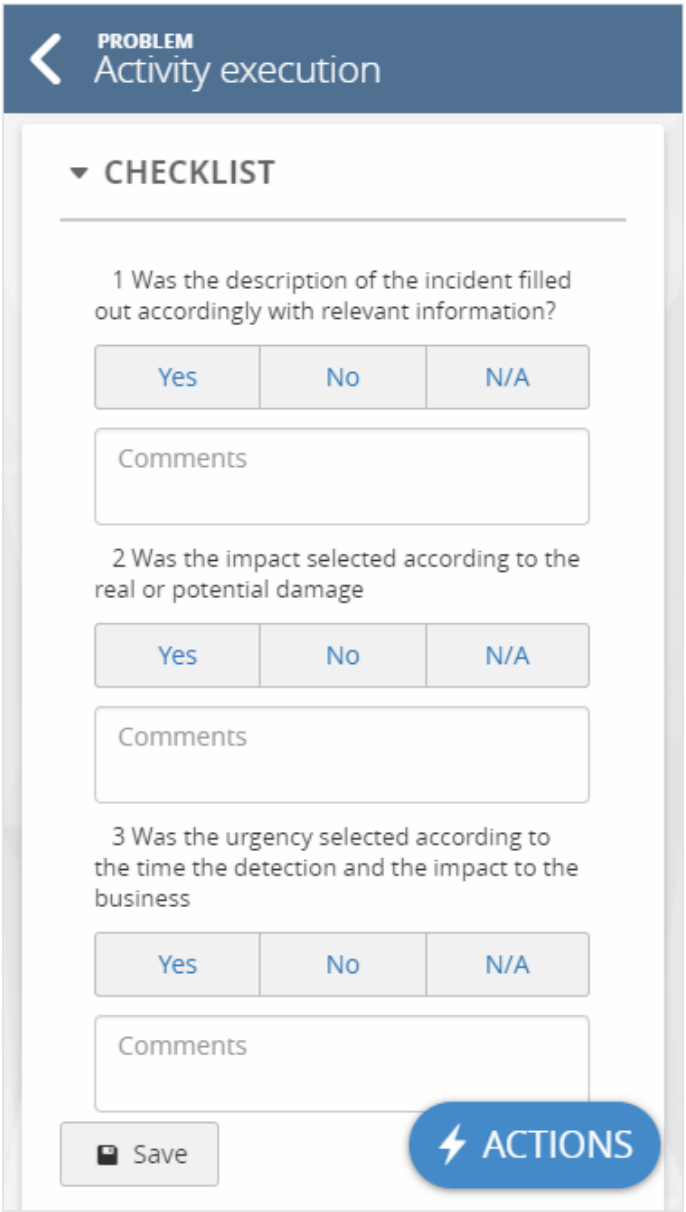


If the incident, problem, workflow, or maintenance activity has attributes to be filled in, the system will display the "Attributes" section in the data of the activity to be performed.

To fill in the attributes of an activity, first, access the attributes section. After that, fill in the corresponding value for each field displayed.

After you have filled in all the attributes, click on the "Save" button so that the values are saved in the activity data.

Answering checklist



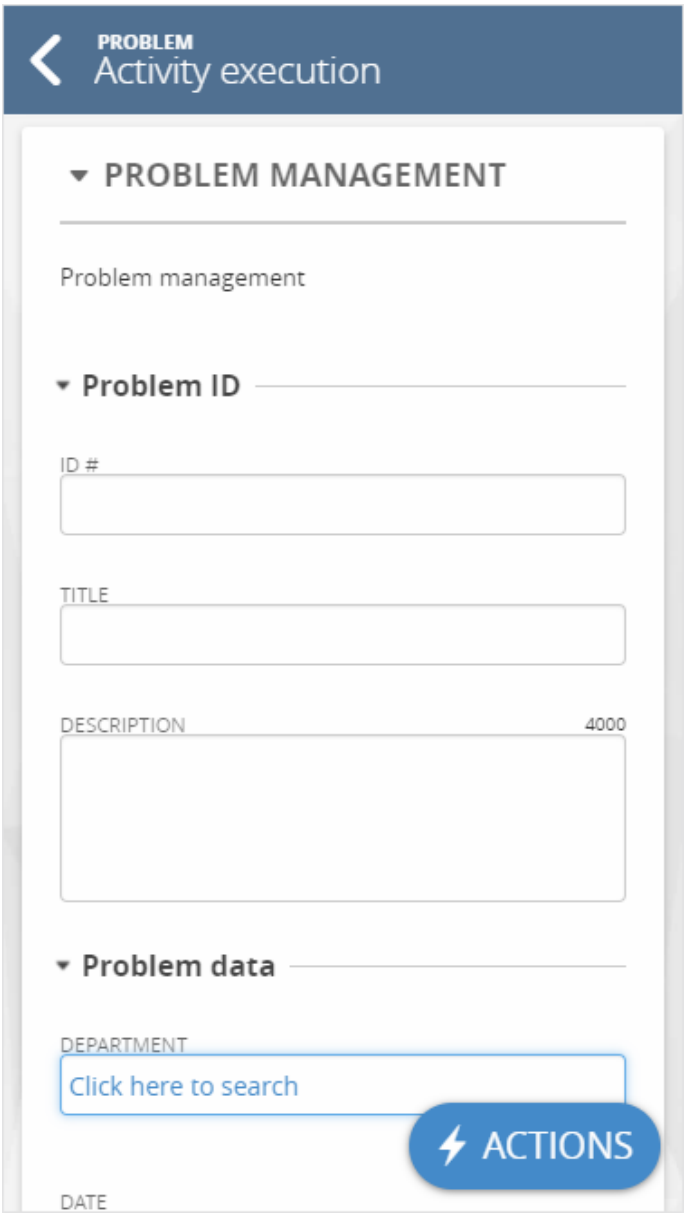
If the incident, problem, workflow, or maintenance - activity is configured with a checklist, the system will display the "Checklist" section in the data of the activity to be performed.

To answer the checklist questions, first, go to the Checklist section. After that, for each question displayed, enter the desired answer (Yes, No or N/A).

Some answers may already be filled with a default option, defined in the checklist. Moreover, it might be mandatory to fill in the Comments field, according to the settings established in the checklist.

After answering all the questions, click on the "Save" button so that the answers are saved in the activity data.

Filling in form



If the incident, problem, or workflow activity is configured with a form, the system will display a section with the name of the associated form.

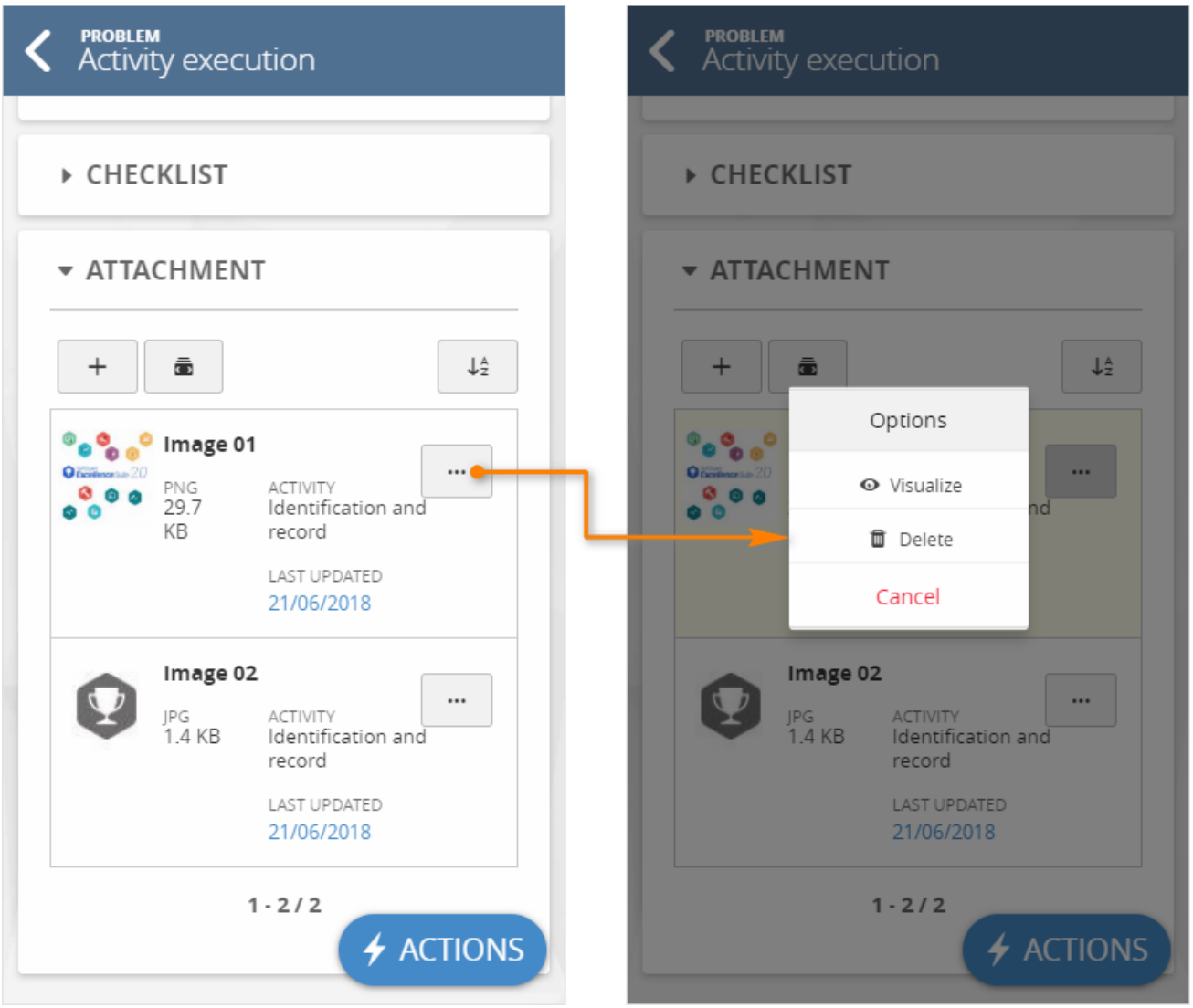
To fill out the form, first, go to the form section. After that, fill in the corresponding value for each field displayed.

After filling in all the form fields, click on the "Save" button so that the values are saved in the activity data.

Attaching files

To attach a file as an attachment to an incident, problem, or workflow activity, first, go to the "Attachment" section in the activity data.

After that, click on the “add” button. At this point, the system will display a screen for the selection of a saved file on your device.



Files that are attached to the activity will be presented in this section, allowing them to be viewed or deleted from the activity.

Part 5 – SE Document (Android application)

The SE Document application for Android allows you to navigate between categories, search and view, on your tablet or smartphone, the documents published in SE Suite.

With the application, you may access documents even if you are not connected to the internet. Whenever a connection is available, the tool updates the latest saved version of the documents, ensuring access to updated information.

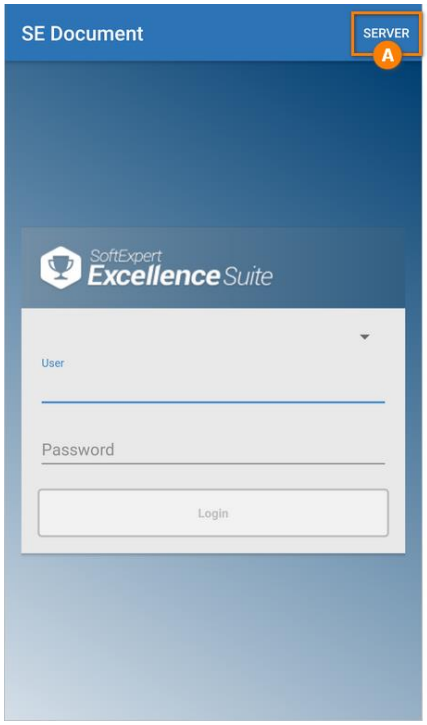
The SE Document application is available on Play Store.

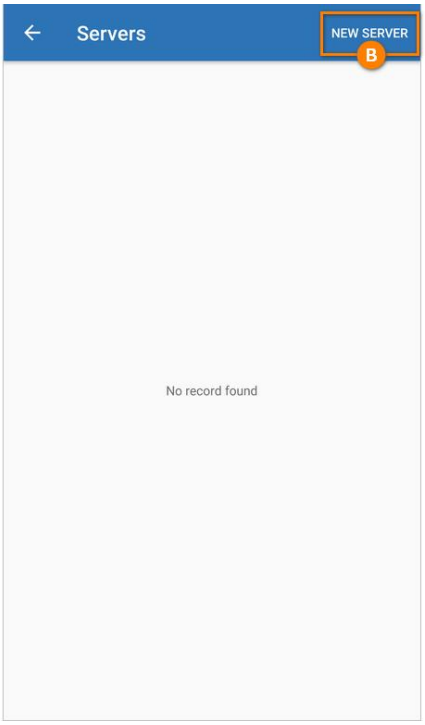
Prerequisites

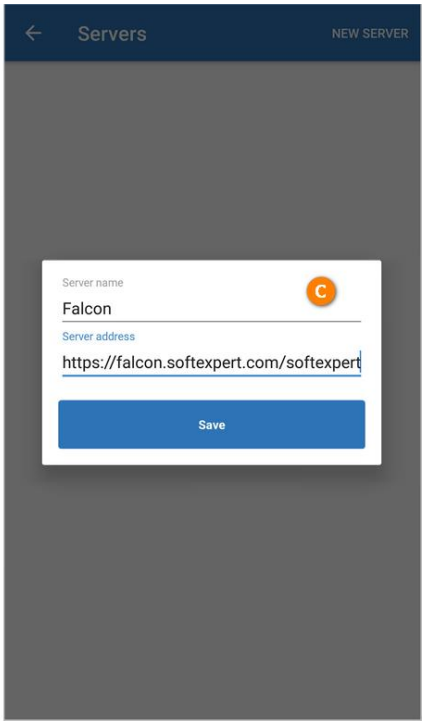
To use the SE Document application, your company must own the SE Suite from version 2.0.12 onwards. Learn more at www.softexpert.com.br.

Adding new server

Before logging in, you must set the server that the application will connect to. See below how to add a new server:







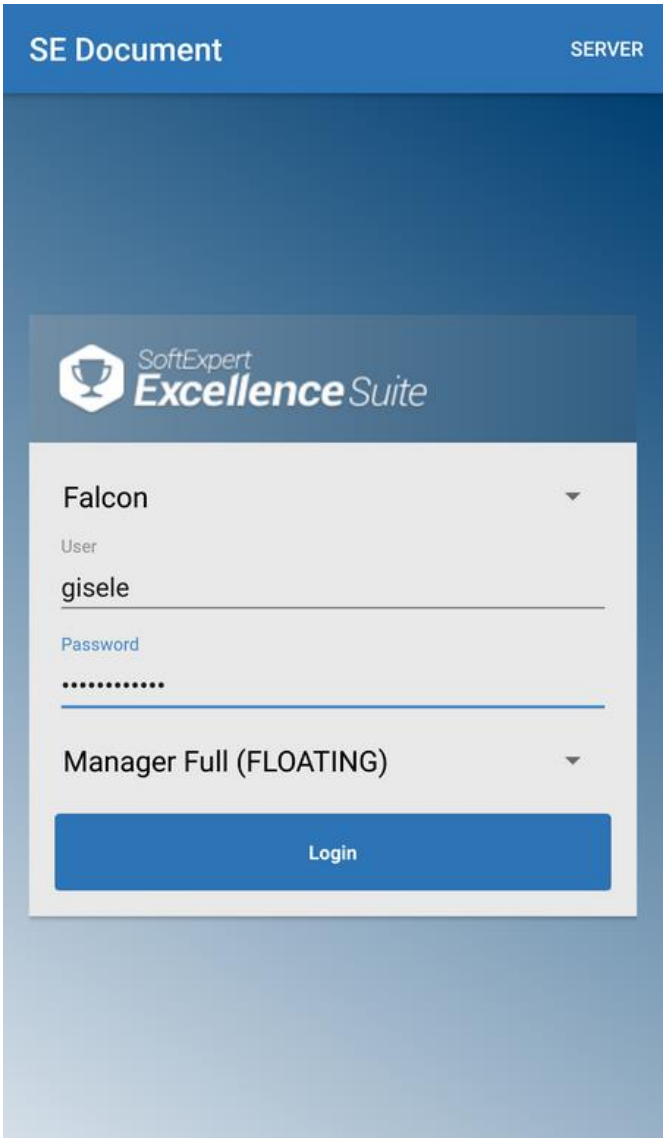
A On the login screen, click on the "Server" menu, located in the upper-left corner of the screen.

B On the screen that opens, click on "New Server".

C After that, enter, in the "Server name" field, a name for the server, and in the "Server Address" field, the URL used to access SE Suite, starting with "https".

If you wish, it is possible to add all the servers that you have access to SE Suite. After the servers are configured, return to the login screen.

Login

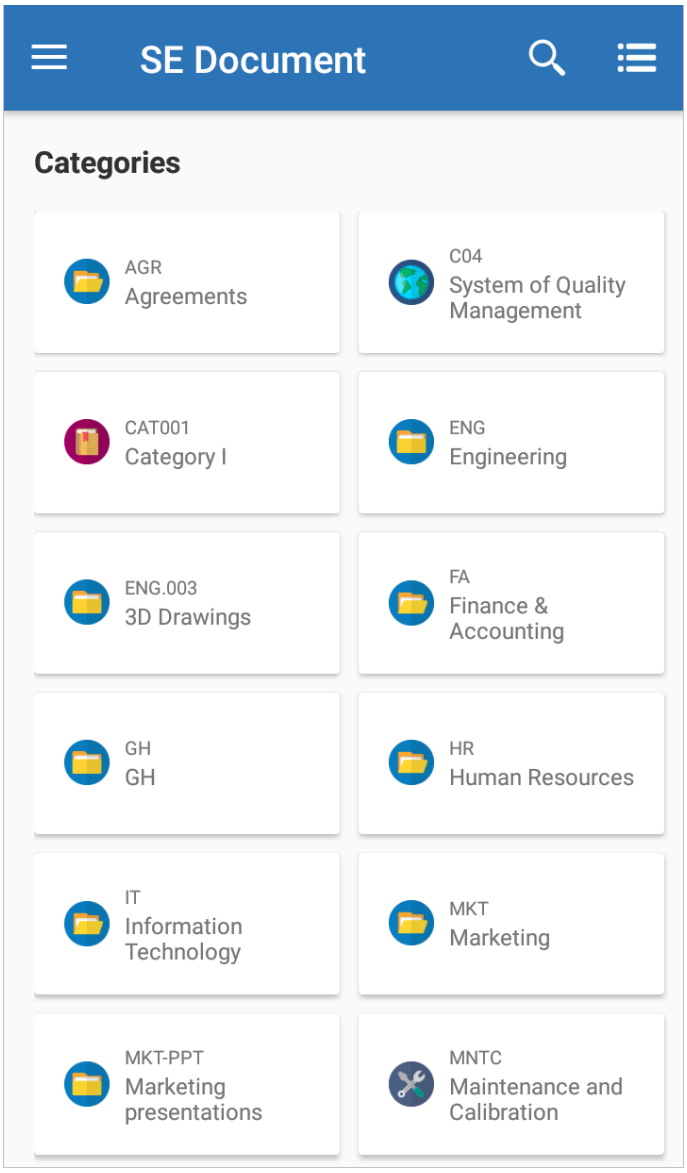


After the servers are added, the system will display a menu above the authentication fields where it is possible to select the server to which you will connect.

Therefore, first select the server. After that, enter the *User* and *Password* in the respective fields and click on LOGIN.

If you are not connected to the internet, on the login screen, the system will display a message informing that it could not connect with the server. Click on the "Access in offline mode" button to access the system and view the documents that were previously saved to be accessed in offline mode.

Navigation



As soon as the login is done, the system will display the document categories.

To access the document for a particular category, click on the desired category and browse the sub-levels until you find the desired document.

To locate a specific document, click on the button and, on the search field, enter the ID # or the name of the document you wish to view.

Use the button to edit the display of the records. The documents and categories may be displayed as a card or as a listing.

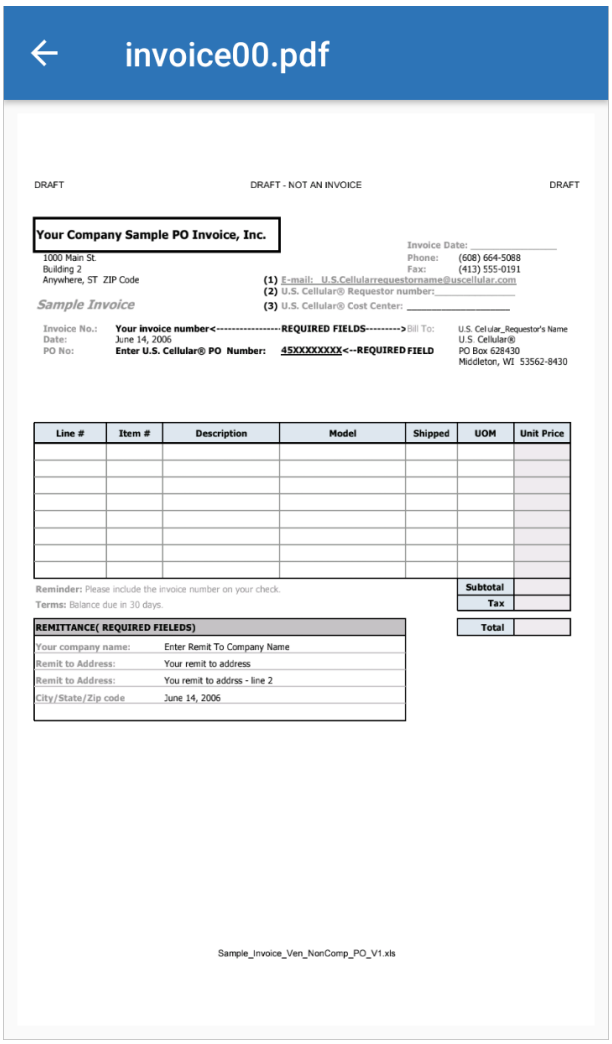
If you wish to return to this screen after viewing another menu, access the "SE Document" menu located in the menu panel on the application.

The document listing will display the button, which allows sorting the records by category, ID #, title, revision, date or relevance (search).

Viewing documents

If the electronic file of the document to be viewed is a PDF or image, then it can be viewed directly in the application, as long as you have permission to view the document.

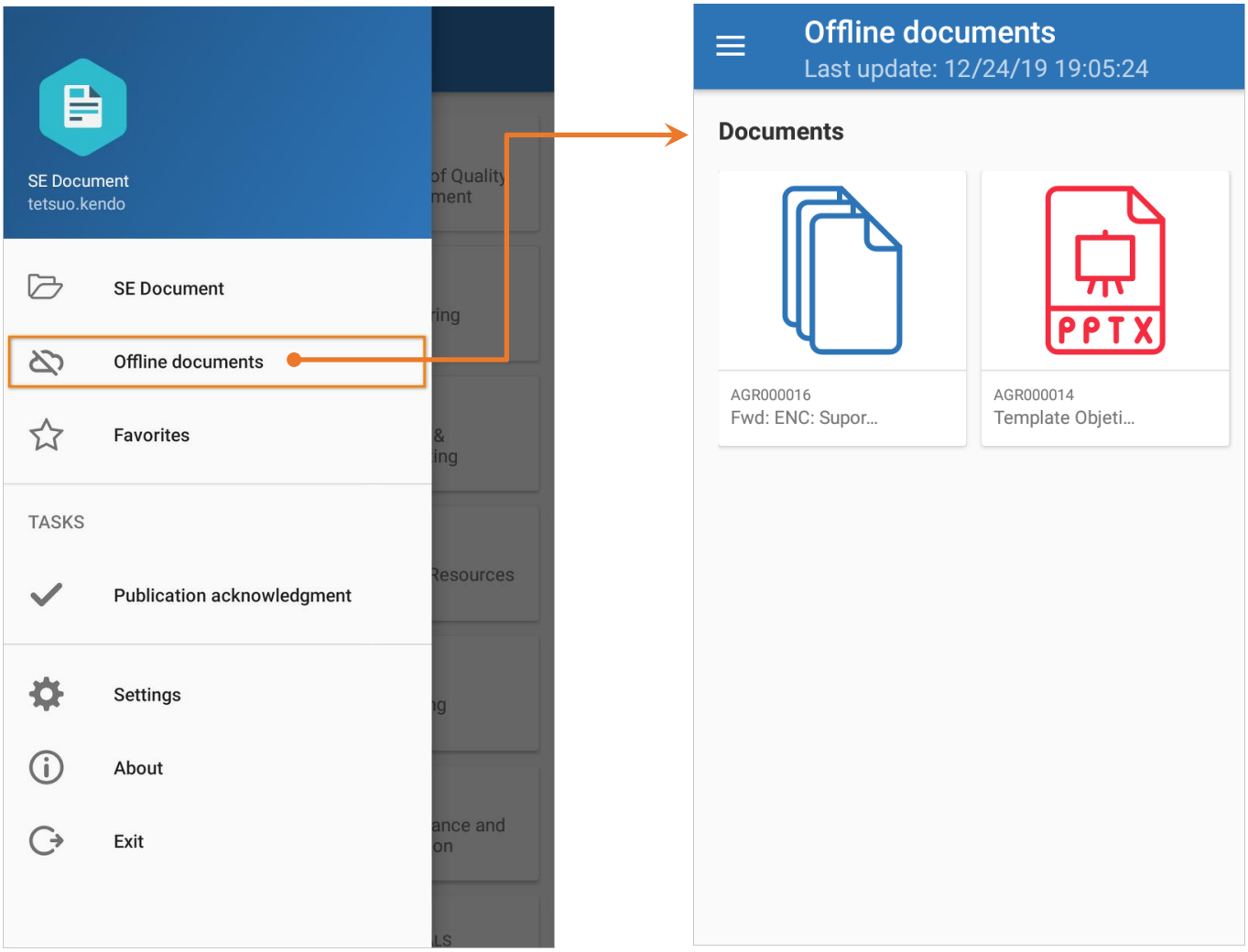
If the electronic file of the document to be viewed is not a PDF or image, then, in the desired document, you will need to have permission to save locally in the desired document, as it will be downloaded to your device. Another way to have the document available offline is by adding the user as an offline user to the document data through the system document creation screen.



Saving offline documents

In order for a document to be accessed even when you are without an internet connection, it is necessary that the "Make available locally" option is checked in the document data through the application.

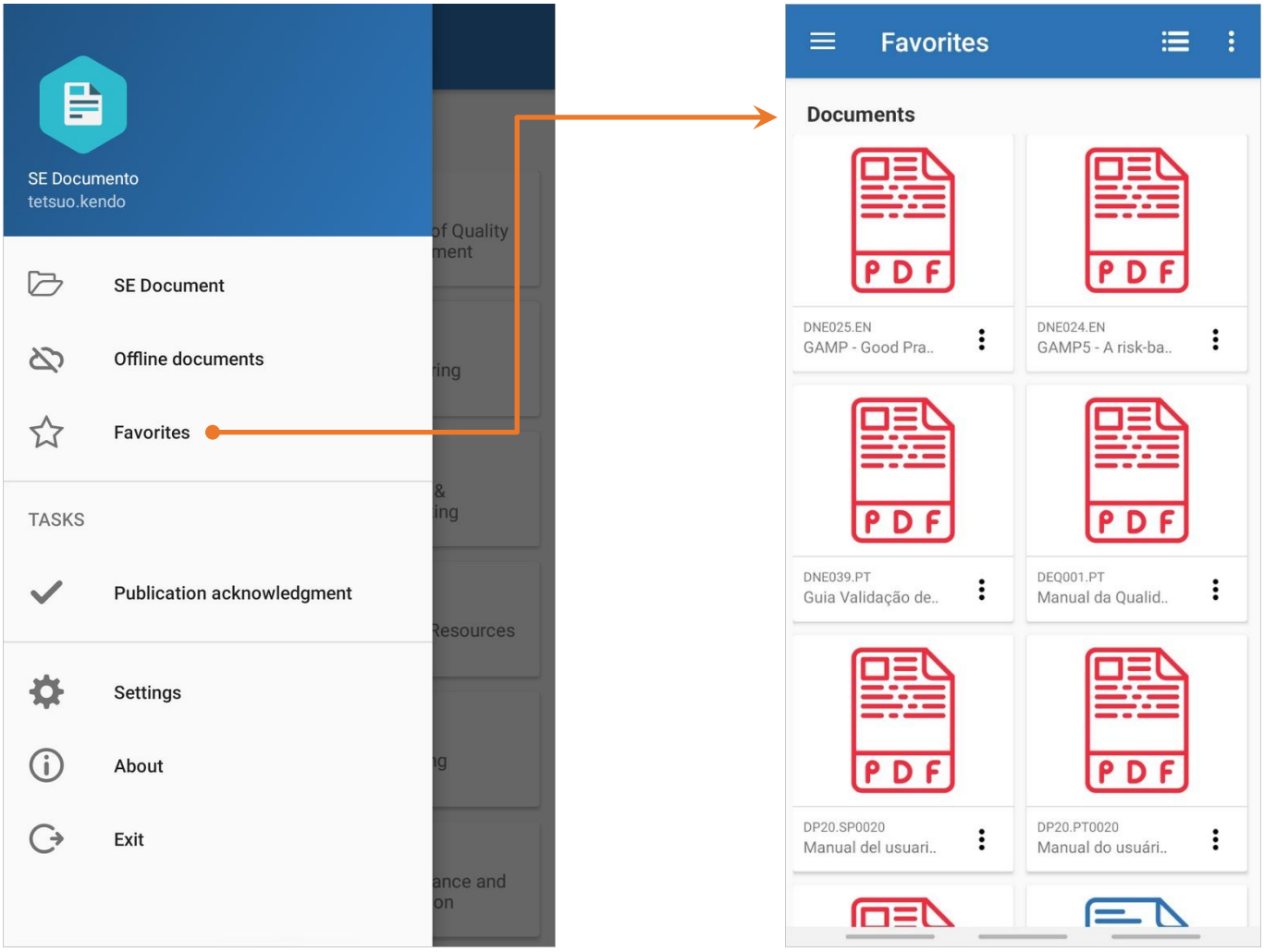
The moment the user is online, the application automatically updates the offline documents to their latest versions.



Refer to the "Synchronization configuration" section to customize the update (synchronization) frequency of offline documents.

Accessing favorite documents

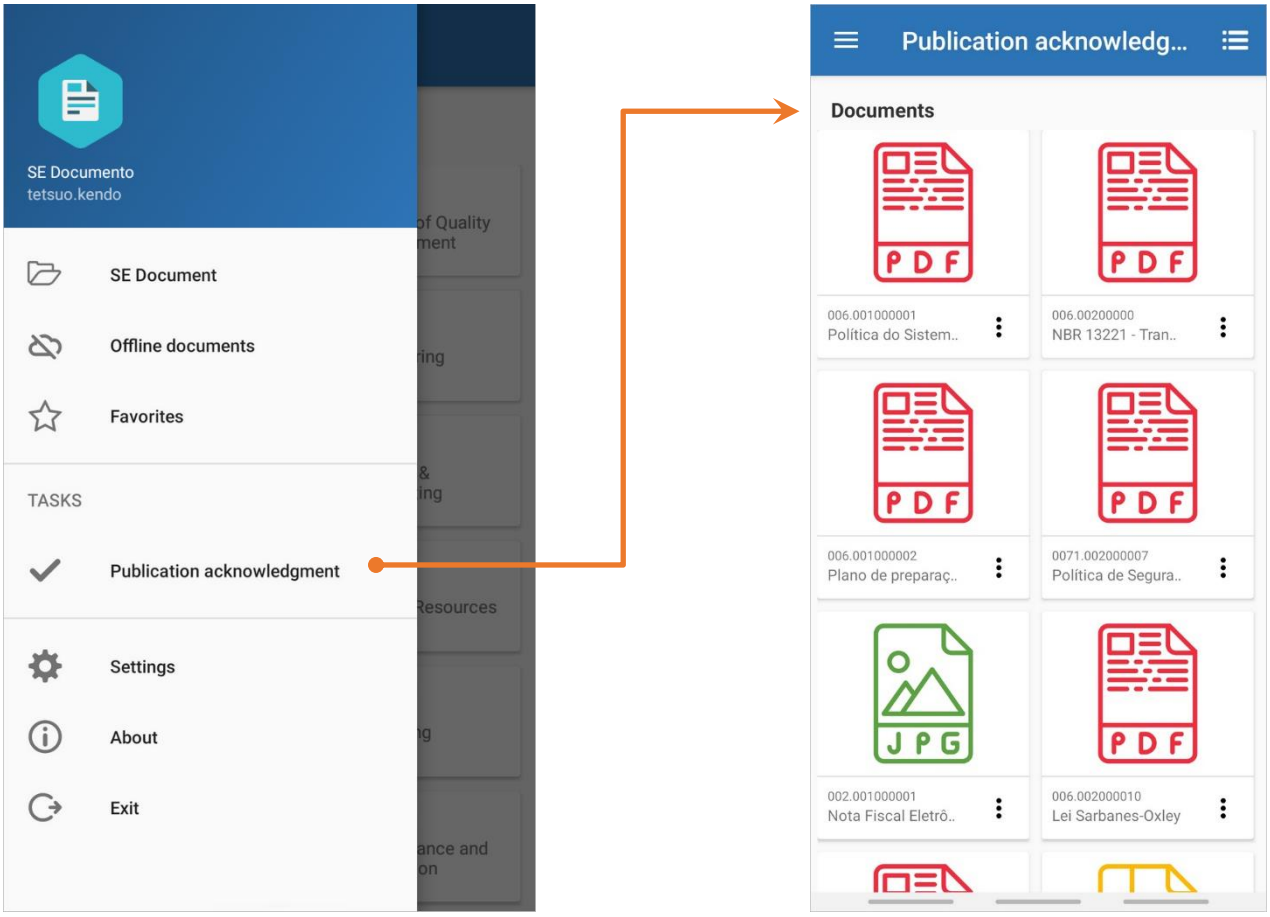
To view the favorite documents, access the "Favorites" menu located in the menu panel on the application.



Executing publication acknowledgment (APP)

To execute the publication acknowledgment tasks for documents, access the "Tasks > Publication acknowledgment" menu located in the menu panel on the application.

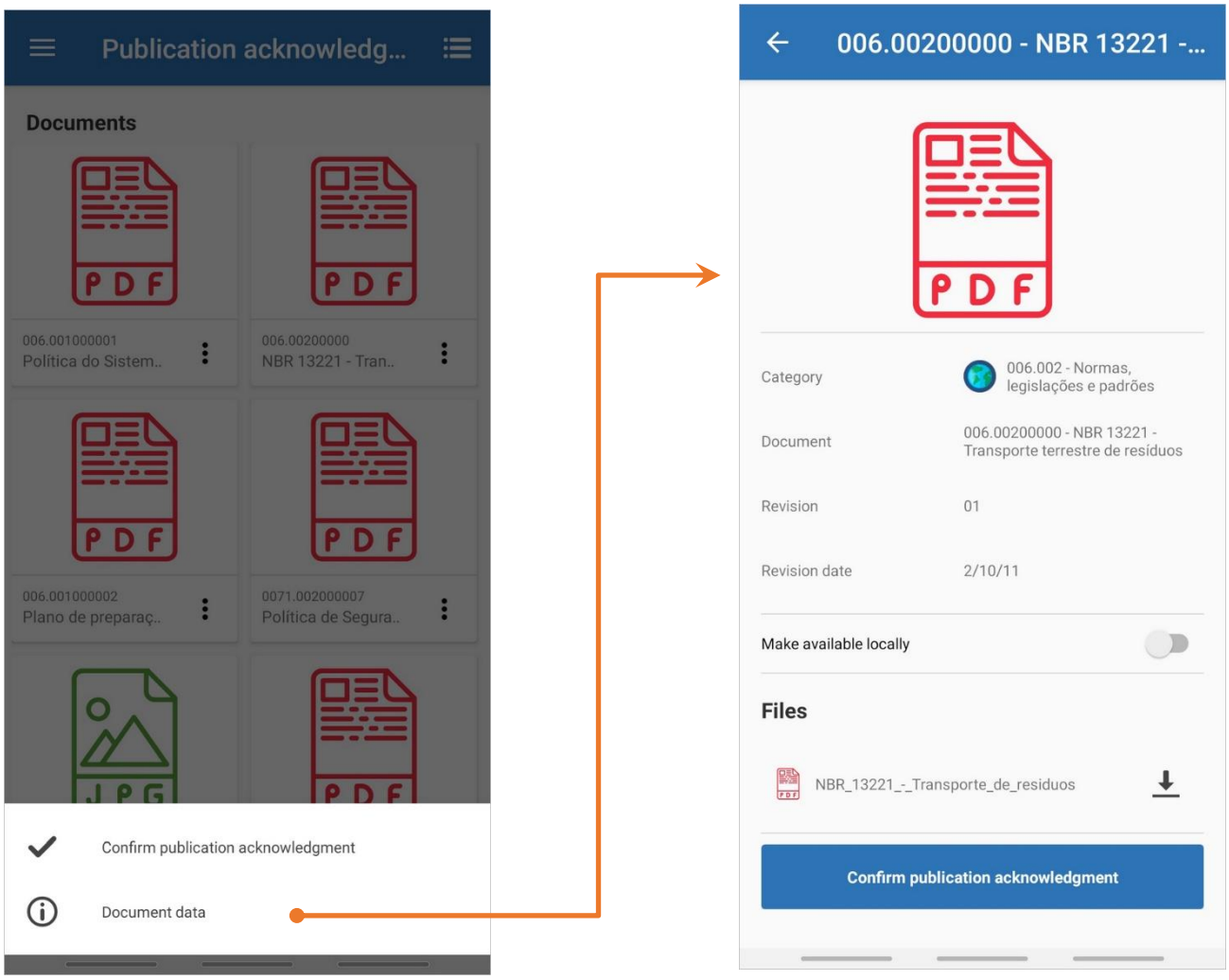
At this point, the documents that have been revised and to which you have the "Acknowledgment" control will be displayed.



By accessing a document, the screen will be updated with the document data. However, when clicking on the ⋮ button, the following options will be displayed:

- **Confirm publication acknowledgment**: This option allows executing the publication acknowledgment task without viewing the document data.
- **Document data**: This option displays the document data.

When viewing document data, in addition to displaying document information such as category, name, revision date and number, the "Make available locally" option is also available, which allows the document to be available in off-line mode. Click on the "Confirm publication acknowledgment" button to execute the task.

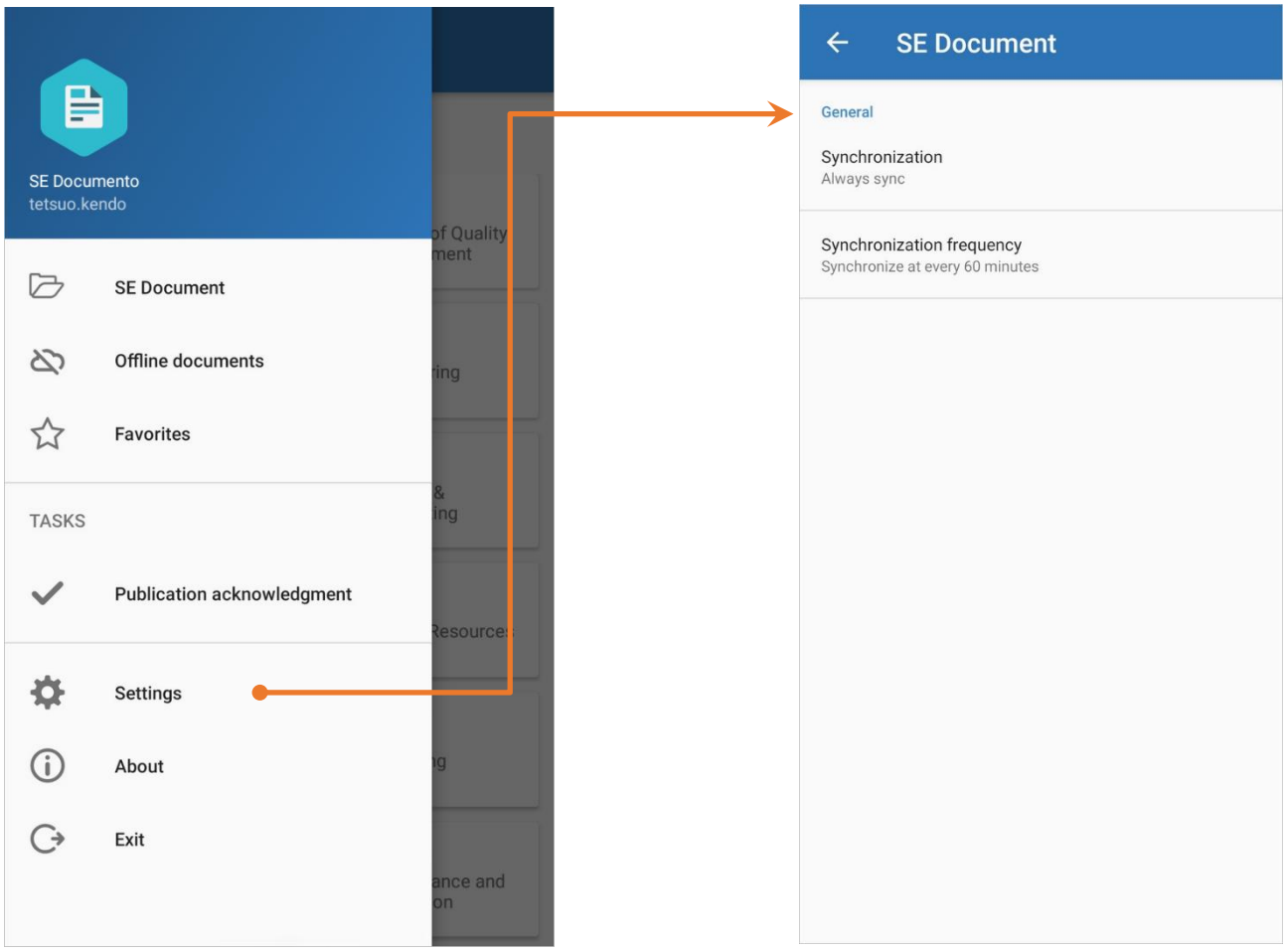


Synchronization configuration

To edit the frequency and/or the network type to be used to synchronize offline documents, access the "Configurations" menu located in the menu panel on the application.

Synchronization: Check the "*Synchronize always*" option for the documents to be updated whenever the device is connected to an internet network. Or, check the "*Sync on WIFI only*" option for the documents to be updated only when the device is connected to a WIFI network.

Synchronization frequency: Configure the number of minutes that will define the frequency to update offline documents. For example: Synchronize every 60 minutes.



Part 6 – SE Maintenance (Application)

The SoftExpert Maintenance app grants access to the preventive and programmed maintenance tasks assigned to you and your team. It is possible to identify which tasks must be started, which ones are in progress, and which ones have been closed. It is also possible to view the priority of each task, its planned date, and its status.

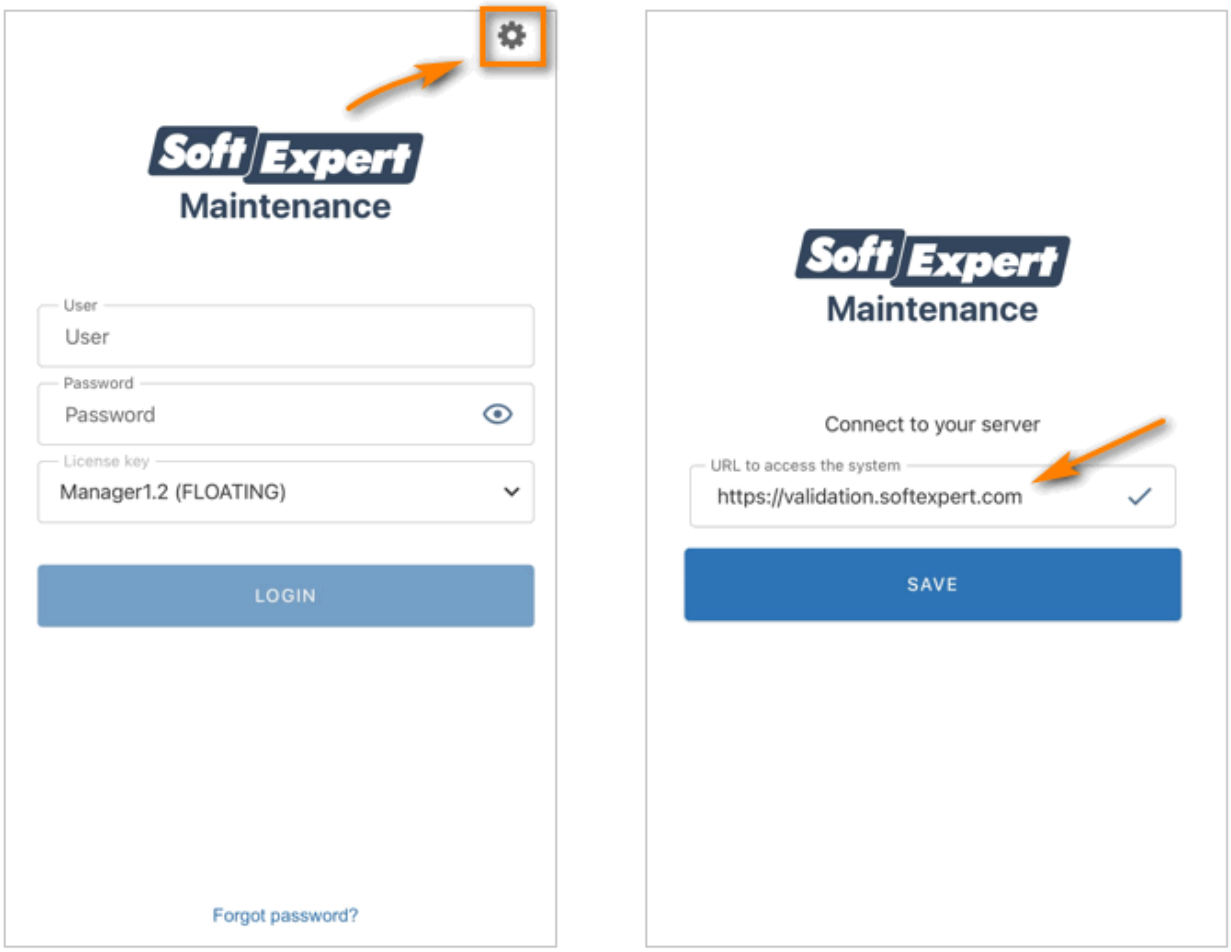
You can use your mobile device to record the progress of the task. Answer checklists, add the description of the executed service, and even add images of the procedures.

Prerequisites

To use the SoftExpert Maintenance application, your company must own SE Suite updated from version 2.1.8. onwards. Learn more in www.softexpert.com.br.

Adding a server

Before logging in, you must set the server that the application will connect to. After installing the application and going through the first steps, this field will be made available:



In the available field, enter the URL used to access SE Suite. If you wish to change it later, simply click on the gear button on the corner of the login screen.

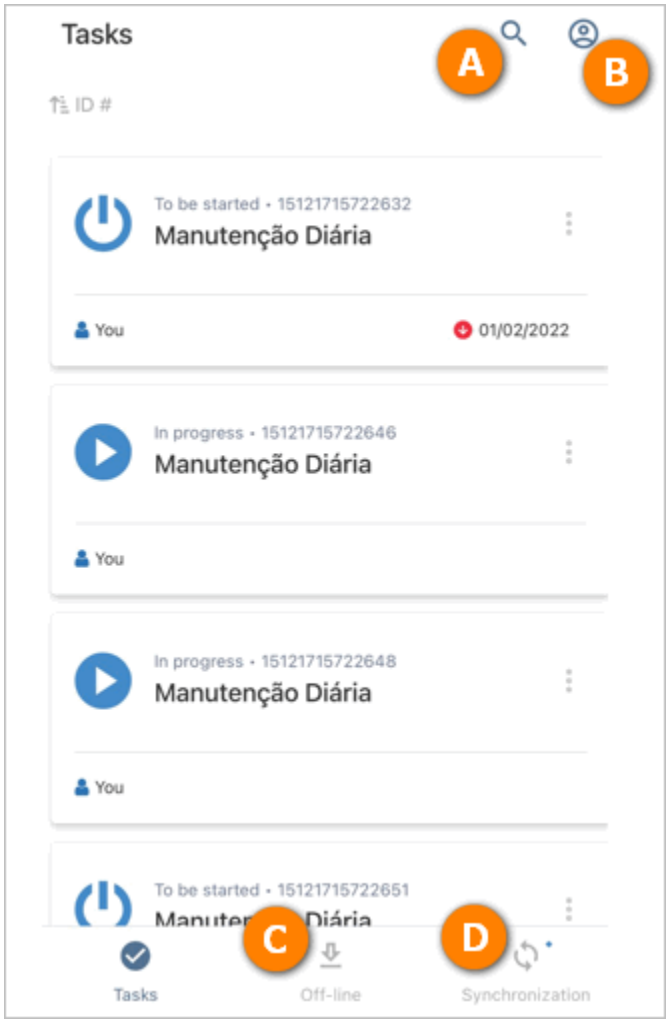
Login

After adding the server, you will be redirected to the login screen. At this point, enter, in the respective fields, the *User* and *Password* and select your *License key*. Then, click on the LOGIN button.

If you are not connected to the internet, on the login screen, the system will display a message informing that it could not connect with the server. Click on the "**Access in offline mode**" button to access the system and view the maintenance tasks that were downloaded to be accessed in offline mode.

Navigation

As soon as the login is done, the maintenance task list will be displayed along with the browsing options:



A Click on this button to search for a specific task.

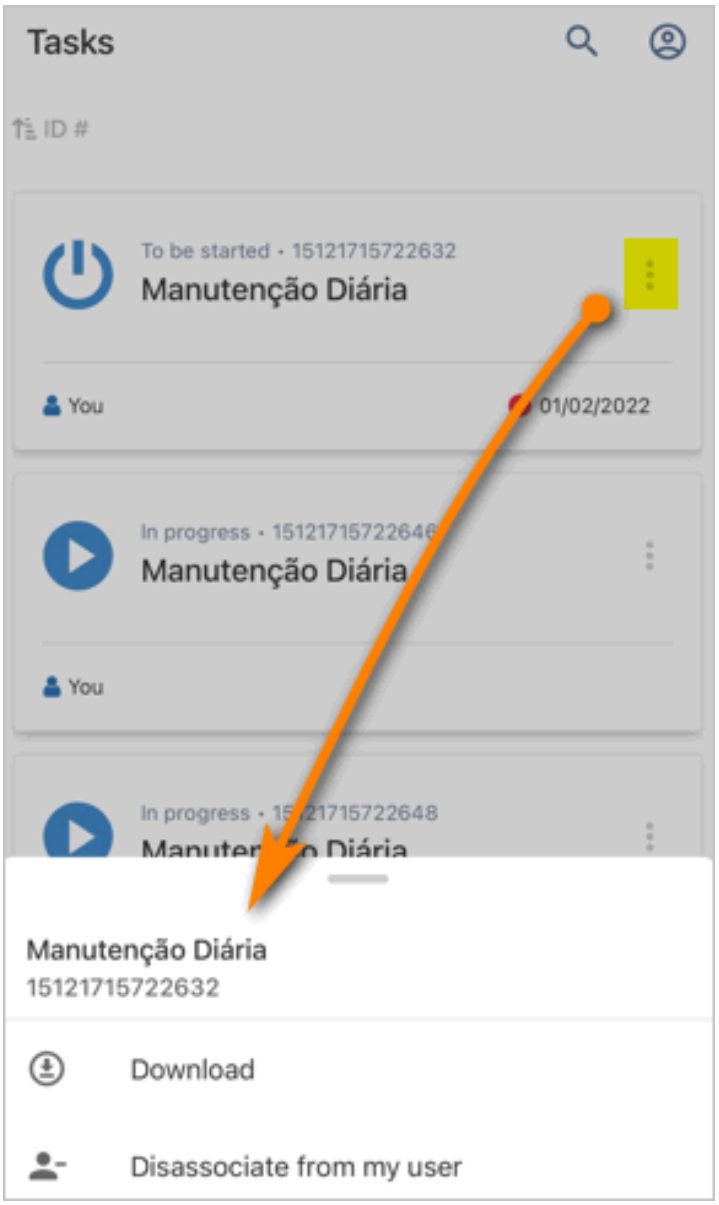
B This button allows you to access the configurations (for synchronization and logs) and the app information, to view the first steps again, and to exit the session.

C This section displays the downloaded tasks that can be accessed offline.

D This section displays tasks under execution and tasks that have been closed separately.

Saving offline tasks

Tasks can only be opened after being downloaded. To do that, on the task list in the **Task** section:



Search for the task you wish to open.

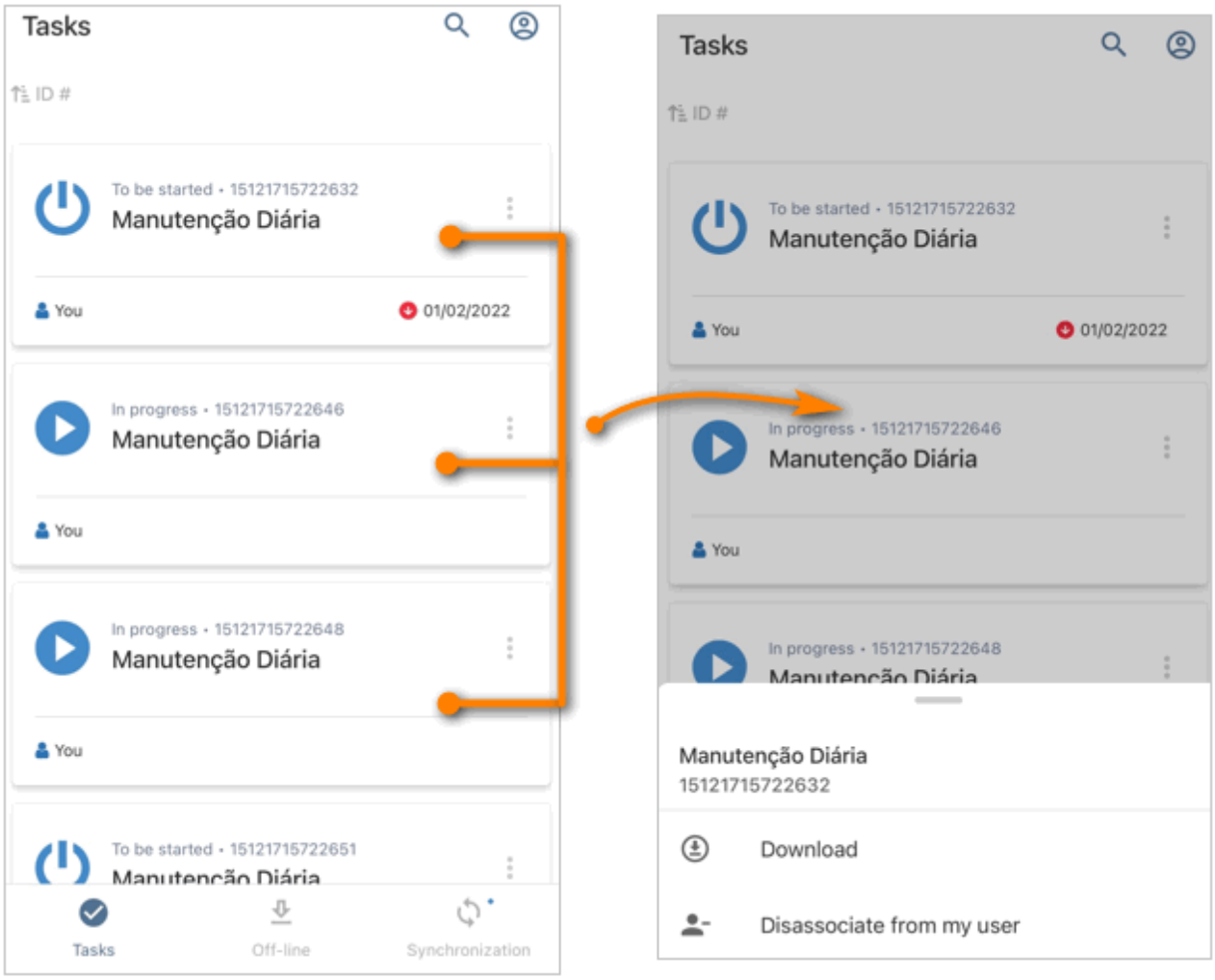
Then, click on the more options button. ⋮

At this point, a tab will be opened at the bottom of the screen.

Click on **Download**.

As soon as the task is downloaded, it will be available to be opened in the **Off-line** section.

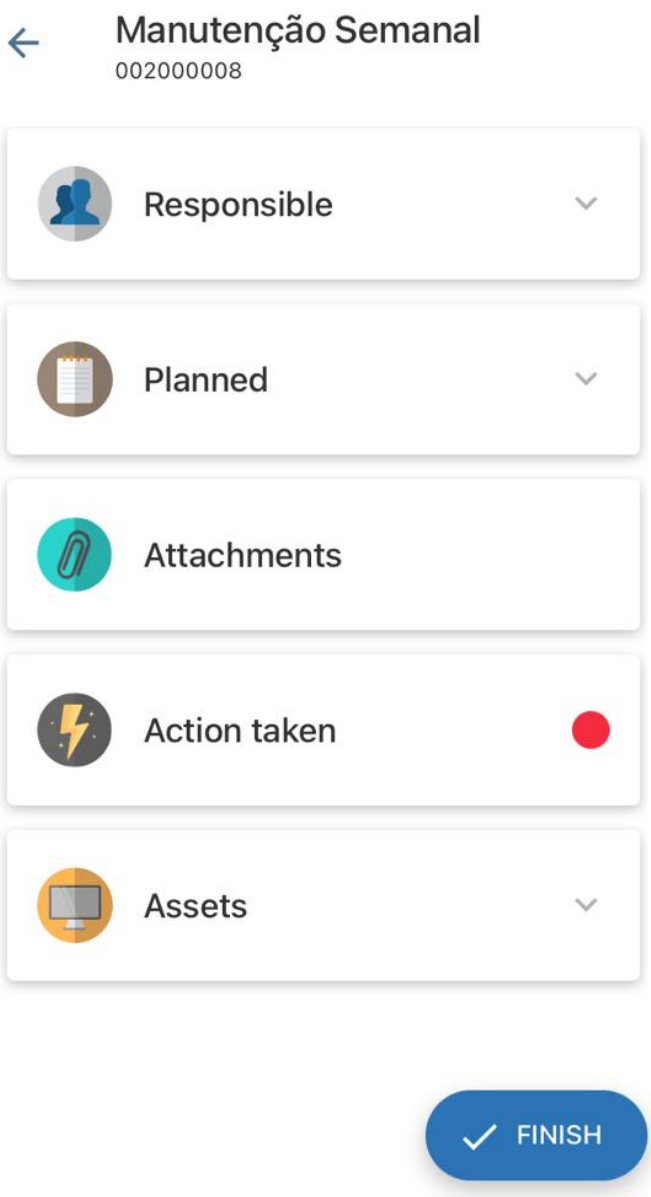
To download more than one task at a time, simply press one of the listed tasks for a few seconds. You will notice that it has been selected once it has blue borders. Click on other tasks to select them as well. Then, click on the blue download button that will be available at the bottom of the screen:



Then, it will be possible to cancel the selection or download all selected tasks at once. Note that the number of selected tasks is displayed. You can open downloaded tasks in the **Off-line** section.

Executing a maintenance task

To execute maintenance tasks, it is necessary to have them downloaded. Once done, in the **Off-line** section, locate the task to be executed. To open the task, simply click on it. At this point, the following options will be displayed:



Responsible: Displays the team responsible for the task, its executor, the responsible technician and service center.

Planned: Displays general task information, such as maintenance type, status, deadline, and priority.

Attachments: Attach images and files to complement the execution of the task.

Action taken: Enter, as a text, the action taken to perform the task.

Assets: Displays the assets of the maintenance task.

After verifying the information and assets, attaching the files, and entering the action taken in the task, click on the blue **Finish** button at the bottom of the screen for the task to be executed.

Confirm the system message for the maintenance execution to be confirmed.