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1 The idea

myIB is a mobile application increasing service quality for ABB products by:

- Adding and registering installations
- Identifying device by Serial Number
- Enabling Site location
- Enabling Reporting product issues
- Allowing you to create a draft in offline mode

At the very beginning it is worth mentioning that access to individual elements is dictated by Access Rights from ServIS. This also applies to individual actions that can be performed on various elements.

Let’s go step by step through all the functions and possibilities provided by myIB.

2 How to install

my Installed Base is an application available for:

- iOS on Apple Store
- Android on Google Play Store.

Using your mobile device click on one of the provided links and download the latest version of myIB.

3 Main screen

The main screen contains some of the most important functionalities to facilitate the use of the application. In the upper left corner you can see the menu, which after clicking shows other options.

In this document we will go through each of these options in turn.
4 App info

In app info you will find general information about the application, such as version and build number, some helpful documents and also Contact Center where you will find a link to a page with phone numbers assigned to individual countries.

4.1 Environment

Mobile application enables switching between production and stage environments. Before starting work, it is recommended to check the environment in which the work will be carried out. When the check box is selected - it means that the application is switched to Stage mode. To switch to the Production environment, uncheck the button and the application will be ready to work with production data.
5 Sites

Let’s take a look at the Sites screen. On the main screen there are a lot of options, let’s focus on each of them.
5.1 Search site
You might look for a site by entering its: name, ID or operator.

5.2 Current location
The application uses the GPS connection on your phone. Based on this, it determines the current position and based on this information, displays all Sites that are within a 100km radius.

5.3 Site information
Here you can see all basic information about the site like Site name, City, Address and how far away is site from your current location.

5.4 Download site
This button allows you to download the Site to your phone. When you go to Offline mode, thanks to this option, site will still be visible to you and you will still be able to work on it. More information in the Offline Mode section.

5.5 Favorites
This little star allows you to add Site to your favorites list/section. Section Favorites is fully synchronized with ServIS Favorite list. Thanks to this, you can have on hand all the sites that are most useful to you, where you work most often. If the star is displayed in blue - it means that Site has already been added to the favorites list.
5.6 Site details
Clicking on this marker, the application moves you to another display where you will be able to see more details regarding the site.

Site details are divided into three sections:

5.6.1 Site details - main tab

In this tab you can find general information about the site, information about the owner and operator, like also at the very bottom of the section you will find a map with the site’s location marked by pin.

5.6.2 Products

All Installations on the site you are currently browsing should be listed in this section. To make life easier you can find here some additional features like: filters, installation download for Offline Mode purposes like also you can add Installation to Favorite list. Let’s focus more on filters.

5.6.2.1 Filters
Filters were provided as a new convenience. They are very useful in cases where there are a lot of installations on the site, and you would like to find one particular from the whole list. Using them we can show relevant results or hide others. After filtering the list, you can reduce or increase the results area by selecting the appropriate values, you can also clear the filters to display all data again. An additional option facilitating work is filtration by ‘Favorites’. The values you can filter on: Serial Number, Category codes, Products names, Product group and Favorites only.
5.6.2.2 Add installation on specific Site

On each of the Sites in the Products tab it is possible to add a new Installation. Just find the ‘plus’ button in the bottom right corner and start adding. How to do it? I encourage you to see Chapter 7: Add product
5.6.3 Statistics
Statistics allow for quick representation of data contained on Site. They represent three categories such as Categories, PGs and Products according to which the numbers are collected by name, count and quantity. By clicking the arrows on the right you can open individual statistics.
5.7 Location
By this functionality you can easily see all sites around you on the map.

5.8 Add button
Clicking the button you can register a new site manually by filling out the form.

5.8.1 Register new site
This functionality allows you to register a new site. By choosing this option, the application will take you to the form in which virtually all fields are mandatory. After completing the form and clicking on the ‘Register site’ button, the data will be sent to Installed Base and will be waiting for approval/confirmation.

To speed up the work, a small convenience has been provided, where after clicking the map icon in the upper right corner the data will be read from your location and then entered into the form. It remains only to enter the missing data. You can monitor the status of all your registrations in Chapter 11: Pending registration.
5.9 Nearby Sites

Here you can specify a location for nearby sites on the map and then display the results on the site list. The mobile application will take you to the map and use the GPS location on your phone to determine the location. Of course, this functionality serves to mark any point on the map and then indicate the results of all sites within a 100km radius.

![Map screenshot](image)

After clicking the Save button a small window will pop up summarizing the information collected from the map. At this point, you can reject them by making a correction or confirming.

In case of correction, the application will try again to read your location but more accurately determine the location of the phone. After that the summary window will pop up again.

In case of data approval a full list of site results will be displayed close to the marked pin on the map.

6 Favorites

Favorite section enables internal users to save the most used Sites and Installations in one place. Additional functionality of Favorites is full synchronization with ServIS Stage and Production environment (depending on the environment selected on the mobile application).
To make it even more convenient to use the Favorites category, it has been divided into two sections: Sites and Products.

To remove a Site or Product from the favorites tab, just uncheck the blue star (on the right). This way the item will no longer be displayed on the list.

Additionally, you can go to Site or Installation details from favorites - just click on the selected element and application moves you to specified information.

7 Add product

On the main view you can notice a button ‘Add Product’ which you can use for adding a new product or you can Add Product from the hamburger menu on the left.
When you select the option you will see that there are few possibilities to add a new product:

![Add new product](image)

**7.1 Scan of the QR/Bar code**

When you run the button ‘Scan QR/Bar code’, the phone screen will change to a camera mode. Then point your phone at the QR or Bar code to allow it to be scanned. When the application recognizes the code, it will enter the appropriate string of characters in the Serial Number box.
At this point, you can start the search by clicking the magnifying glass next to the Serial Number field.

7.2 Scan of the Serial Number

To scan a Serial Number, press the button to start a specific option and the application will switch to camera mode. At this point a rectangle will appear on your screen. You can adjust its size and position to your needs, indicating where the application should scan the Serial Number. Once you adjust the frame, then you must click on the ‘Take Photo’ button. Now, the application will analyze the image and on this basis display the scan result. If everything is correct - just confirm and run the search by serial number.

Please look below for examples of using scans to support OCR:
7.3 Scan using photo

By this functionality you can choose a picture from your device from which you would like to scan the serial number. After selecting the image, a thumbnail image will appear at the top of the screen. After that you can run Scan from the Photo button. The image will be displayed in full scale and at this point a rectangle will appear on your screen.
You can adjust its size and position to your needs, indicating where the application should scan the Serial Number. Once you adjust the frame, then you must click on the ‘Take Photo’ button. Now, the application will analyze the image and on this basis display the scan result. If everything is correct - just confirm and run the search by serial number.

### 7.4 Serial Number search

This function enables you to provide manually a string of characters. After that you can search for a matching Serial Number.

You can check if a device already exists in the ServIS database. After clicking the magnifying glass, the application will prompt the associated results and check if a particular product already exists in ServIS. After the application matches the results you will get basic details regarding installation.

![Add new product](image)

Provide a serial number to check if product already exists.

Serial number

7.5 Expected results of the search

After entering the Serial Number and searching for it, you might expect the following scenarios:

- Serial number doesn’t exist or it’s very similar to the existing one
- Product was found and is located in Factory Container
- The serial number was recognized but you want to add the product with the same S/N

#### 7.5.1 Serial Number doesn’t exist or it’s very similar to existing one

In case when the given S/N does not exist, the application will ask if you would like to add a new product. It is important at this stage for the applications to associate the Product Name field, because without it, you will not be able to register a new product (Product Classification will not be matched – it’s mandatory to provide it).
However, if the application finds installations with a similar name to the one you provided - it will suggest the most relevant results. Then you will be able to complete other mandatory information (marked with 
*) such as Site, Product group, Category, S/N.

After completing the information, you can save your data. This is equivalent to creating a new installation. As a last step, a small window will pop up where you can see the details of your installation and the option to add it to your favorites.

### 7.5.1.1 Add new competitor product

Please provide the most accurate information in the ‘Product name’ field (myIB searches database via Product name/CID). Finding the most relevant result, complete other mandatory fields and save your data.
7.5.2 Serial Number was recognized and it’s located in Factory Container
If the application finds the S/N located in the Factory Container, it will display the details of the installation and allow it to be relocated.

Relocation means the change to the Site where the current installation is located. If you notice any incompatibility, the installation is on the wrong site, here you can just make corrections also including some comments, for example the reason for relocation.

Confirm the change by clicking on the ‘Relocate installation’ button.
7.5.3 Serial Number is recognized and application found a match

In case product you tried to add is already in ServIS database – application will display all information regarding the device.

Here you can decide if the serial number found already exists in ServIS and you would like to reallocate it to another site (more info in point: Serial Number was recognized and it’s located in Factory Container) or register a new product with the same serial number. Choosing the option to register a new product, you will start the process described in the section 7.5.1.
8 Products

The products in the application are not visible anywhere directly. To get to the details of the Products, we can choose one of two ways, such as:

- From the Sites tab
- From the Favorites tab

8.1 Products visible from Site

From the main screen select the category Site and then Site to which the installation is assigned.
Going to Site’s details, select the Products tab. It will show all Installations assigned to the site.

In this step, you have the option of adding the Installation to your Favorites, download it on a device and switch to installation details by clicking on the selected element.

8.2 Products from Favorites
From the main menu select the favorites category and then the favorites product category.

This list will display all products that you have previously marked in myIB as favorites (or you have marked them as favorites directly on ServIS).
No matter which path you choose, the details of the Installation are the same everywhere!

8.3 Product details
In the product details tab you will find all the necessary information about the Installation gathered in one place, such as:

8.3.1 General information and possible edits
If you have all the necessary rights, the option to edit: customer tag, status, description and manufacturing date will appear next to those sections. That will allow you to quickly verify the data and overwrite them by clicking the Edit button.

Just make a change and the information will be overwritten automatically on the side of the mobile application and ServIS.
8.3.1.1 Sub-products
In the product details tab you can also find the Sub-products button. Click on it and see the product's substructure defined in ServIS Product Classification for myIB

- You will be able to see a parent product (root) on the top
- Product whose sub-structure you are checking
- Sub-installations
- Plus sign that might be used when you would like to add new sub-products

8.3.2 Technical Details
If you have all the necessary rights the ‘View technical details’ button will appear under the General Information section. After clicking it, a window with all technical details on the installation will pop up.

8.3.3 Location
If location information has been entered, you’ll see it marked with a pin on the map. In case the Installation location has not been added anywhere, you can complete it by clicking ‘Add coordinates’. The application will switch to map mode and you will be asked to select the location for the map installation. After clicking the Save button, the application will display a message whether the location is correct. You can confirm it or by clicking on the ‘Correct’ button.

8.3.4 Comments
In the Comments section, all previously added comments are displayed that are on a particular IB.
8.3.5 Reported Issue
This tab will display all reported errors for a specific installation via the mobile application with short details.

You might also here Report a new Issue by clicking on ‘+’ sign (bottom right corner). Details of how to Report an issue please find in chapter 9.
8.4 Recommended services

Here you can preview a list of recommended services planned for specific Installation. Additionally, by clicking on a single element you can display its details.

A button has also been added, thanks to which you can submit a recommended service by pressing the ‘plus’ button in the bottom right corner.

When adding a new recommended service, the application will ask you to fill in some mandatory fields (marked with *) and those that are ‘nice to have’ to facilitate later work with the recommended service.

- The service type field includes all service types assigned to a specific product classification contained in the ABB Product Tree.
- ‘Send to SF’ button allows you to send a notification about the recommended service to SalesForce using defined email to case on ServIS side.
- Notification is an additional option that you can use to inform someone or add them to the notification about the service. The application connects to your address book on your phone (you must agree) to use the email address or you can enter it manually.
8.5 Service Events

Here you can preview a list of Service Events planned for specific Installation. Additionally, by clicking on a single element you can display its details.

A button has also been added, thanks to which you can submit a service event by pressing the 'plus' button in the bottom right corner.

When adding a new service event, the application will ask you to fill in some mandatory fields (marked with *) and those that are ‘nice to have’ to facilitate later work with the service event.

- The service type field includes all service types assigned to a specific product classification contained in the ABB Product Tree.

9 Report issue

If you noticed an issue with your equipment, you can easily report it through the application. A section Report Product Issue has been created to report any bugs - all you have to do is select the button from the main menu.
In the next step you will have the possibility of one of three possibilities to report a bug:

- Via QR/Bar code (1)
- S/N scan (2)
- Scanning photo (3)
- Serial number search (4)

9.1 Scan QR/Bar code

When you run the button ‘Scan QR code’, the phone screen will change to a camera mode. Then point your phone at the QR or Bar code to allow it to be scanned. When the application recognizes the code you will be informed by short vibration and sound (in silent mode only vibration) about that, then if there is already a registered device with a matched serial number in the database - it will display the results. Otherwise it will display the message 'QR code not found'.

9.2 Scan S/N

Thanks to the quick scan, you can directly point the phone camera at the object to be scanned and take a picture. In the photo, select the area which should be captured.

If everything is correct - confirm your choice and the application will recognize the string and enter it into the S/N search engine.
9.3 Scan using photo

By this functionality you can choose a picture from your device from which you would like to scan the serial number. After selecting the image, a thumbnail image will appear at the top of the screen.

After that you can run ‘Scan from the Photo’ button. The image will be displayed in full scale and at this point a rectangle will appear on your screen.

You can adjust its size and position to your needs, indicating where the application should scan the Serial Number. Once you adjust the frame, then you must click on the ‘Take Photo’ button. Now, the application will analyze the image and on this basis display the scan result.
If everything is correct - just confirm by the ‘Looks good’ button and run the search by serial number.

### 9.4 Manual report

Just provide the string of characters into the S/N search engine and run.

![Image of serial number search]

#### 9.5 Report Issue overview

As the specific S/N has already been scanned, let's move on to reporting issue. When the application finds the result, it will list its details on the screen, please confirm your choice by clicking on the name from the list.
Then the application will display two types of reporting problems with the option to send each of them. The first is reporting issue including creating Email to Case for SalesForce and second is adding Recommended Service to ServiS.

Just select with the slider which of the options you want to perform (the active action is marked in blue):

### 9.6 Report issue through Email to Case for SalesForce

At the very beginning, check if your slider to Report Issue looks like below:

![Report Issue Slider]

Please fill out the values below the slider such as:

- Description box - here you can explain what the problem is about
- Is issue or files Externally visible - decide here whether issue and all attachments will be visible for external users
- It is also possible to add an attachment
After completing the form and submitting it, a short notification will be displayed on the screen:

![Notification](image)

**9.7 Report Issue through Recommended Service**

After searching for the serial number and choosing a specific device, its details will be displayed on the phone screen with the option of submitting the Recommended Service.
The RS notification requires the completion of several mandatory and ‘nice to have’ fields such as:

- Service type which is mapped from ABB Product Tree
- Planned date
- Comment
- Price [kUSD]
- Estimated labour hours
After completing the fields, we will receive a notification that an RS has been created on the ServiS side.
10 Special Tools

Here you can add a tool that is used for service repairs. You can also preview attached files like images, documentation, manuals etc. only by QR code scan. To do that click on the ‘plus’ button and scan QR code.

After scanning the code, a new tool will appear in the special tools list.
You can select it and see the details of the tool like also all documents attached into it.
In special tools you can also submit your suggestions for the device as well as report a defect. Just select a specific request (marked on blue), enter your comment in the text box and send.

11 Pending registration

As an additional functionality in the mobile application has been provided the ability to monitor all actions, i.e. adding sites or installations in a special tab.

To open it, select the Pending registration section from the hamburger menu in the upper left. After selecting it, a list of all actions and their statuses will appear.
12 Preparation for Offline work

The myIB application also allows you to work when there is no internet access. The application automatically switches to Offline mode, allowing you to work on previously downloaded items in Online mode.

To be able to work on products and sites offline, you need to complete some necessary steps online.

12.1 Sites preparation

Select Sites from the main menu, and then search for items on the list of Sites. Sites have been marked with additional markings such as:

- Sites with possibility to download into Favorites

![Downloaded Site with possibility to view in Offline mode](image)

- Downloaded Site with possibility to view in Offline mode

![Downloaded Site with possibility to view in Offline mode](image)

In addition, a basket icon is visible when the site is downloaded. It allows you to remove a site from Favorites in the Offline mode or in case of accidental click to undo the action.
12.2 Product preparation

Downloading installations to offline mode is not as obvious as downloading a site. To download
the installation on the device you need to be online and then select the Sites categories from
the main menu.

The next step is to search for the site to which the installation is assigned, open the details of
the site, and then switch to the Products tab.

In the products tab, you should see the available list of Products. Pay attention to the icons.
Icons will indicate the status of the item if it will be available in the offline mode or not.
The watermark in the background means that item is ready to work in the offline mode. The
garbage bin icon allows you to remove a downloaded item from your device, i.e. it will no
longer be available offline. Downloading and deleting does not affect data - we only operate
on the phone's internal memory.

The icon means that the product has not yet been downloaded to the device and can be
used only in Online mode. After clicking on it, the product will automatically download.
13 Offline mode

A first glance, when offline, you should notice that at the top of the main menu there is an icon that indicates that the mobile application has no access to the Internet.

![Offline mode icon]

After preparing the Sites and Products for offline work ([Chapter 12](#)), you can start working with the application. Please remember that in Offline mode most of the functionalities are disabled.

13.1 Sites

To be able to view previously added Sites and Products without internet access, you must open the Sites section.

![Sites section]

After selecting this option on the phone screen should appear a list of all available sites (it means: downloaded to the device online).
By selecting a specific site you will see all the options previously available, such as:

- General Information
- Owner
- Operator
- Map

Tabs like Products and Statistics would be also available in the Offline mode.

**13.2 Products**

By moving between the tabs on Site, you can jump to the Products tab. There will be all products listed that have been marked Online with the ability to work Offline.
By clicking on a specific product you can easily go to product details such as:

- General Information
- Technical details
- Location

Like also switch between tabs:

- Comments
- Recommended services
- Service Events
- Reported Issues

In offline mode it is only possible to view all this information without the possibility of editing it.

**13.3 Add new product**

Adding a new product is one of the most important functionalities in Offline mode. In the Products tab on the Site at the bottom right corner there is a blue Add button . After selecting the button, the application runs the product registration mode. To register a product, you must provide its serial number and some short basic information. Then application creates the Draft.
In this mode, all necessary data to create a draft should be provided, such as:

- Serial Number
- Commission date
- Manufacturing date

There is also a Description field which is not mandatory but highly appreciated. You can provide there any additional comment for future action related to this specific product. After that you can Save draft. But what does draft really mean?

The draft means that in the Offline mode we can create an infinite number of Drafts that will be stored on your device in the Draft section (see Chapter 14) and then after going into Online mode will enable their registration - according to those presented in Chapter 7 Add product.
14 Drafts Offline mode

In the mobile app has been added a Draft mode where are stored records about newly created installations with no access to network connection.

This is an additional benefit for those who, being out of reach of the Internet, could add something to myIB library on an ongoing basis and monitor the actions.

To open the Draft sections, select the Drafts section from the hamburger menu.

Drafts are presented in the form of a list. Important information about Drafts is that in Offline mode it is only possible to edit them. So after selecting an item, you can view the information stored in it or make changes like adding comments, etc. You can also delete a record clicking on the basket icon 🛒.
15 Drafts in Online mode

After finishing work offline and going online, you can easily send your previously prepared work to the ServIS database.

Select the Drafts section again in the menu and find previously created records. The registration process is very simple, just click on the selected item on the draft list and the application will start the registration process - identical as in Chapter 7 Add product.