MANIFEST

Client Portal

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Manifest Client Portal User Guide by each Section

WELCOME

About

This guide is an overview in how to use and navigate the client web portal that accompanies the 3D Manifest platform.

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"Everyone is an expert"

Manifest is a cutting-edge application using 3D placement of markers to instruct users where, when and how to do complex work tasks. Powered predominantly through user generated content stored in a secure cloud for each client – the solution is ready to begin using with minimal set-up.

Manifest was conceived and created with the basic ideals of simplicity, consistency, and scalability to allow all industries and users the power to apply proven methods for successful and seamless organization, training, and learning in a mixed reality space.

YOUR MANIFEST INSTANCE

When a Manifest domain is first deployed, the assigned Client Administrator will be issued an email prompting them to set their user password and access the Manifest Client Portal. By default, the Client Administrator will also be assigned as the Security Admin. It is the Security Admin's responsibility to provision the user accounts and assign permissions accordingly.

**Please reference section [Enter section] for more information on the role of the Security Admin.

Your unique domain

Each Manifest instance has an assigned domain. You will need your domain and individual credentials to access any Manifest application, including the client web portal.

When accessing your client portal please enter the following into the preferred browser which is Chrome.

[domain].taqmanifest.com - Azure Server

[domain].taqtile.ai - AWS Server

Client web portal

The Client Web Portal is a web application where you can view and configure your data. There is some data that cannot be authored via the 3D application and must be configured via the client web portal. That includes: Creation of Users/Permissions, Locations, Asset Classes, uploading of 3D models and documents, as well as the registration of assets and downloading of asset tags.

USER PROVISIONING

New user email

When your Security Administrator creates a new user account for you, you'll receive a system-generated email containing:

- A link to create your password
- Your unique Manifest domain
- URL to your Client Web Portal
- Outline of the Roles/Permissions you have been assigned
- Important links to ask questions and obtain help

Please save these credentials. You will need them to access the application on all platforms.

Client security

Depending on the security settings set by your Security Administrator, you may be required to enable Two-Factor-Authentication. Administrators can also create settings for:

- Session Timeout
- Password Strength
- Password Expirations
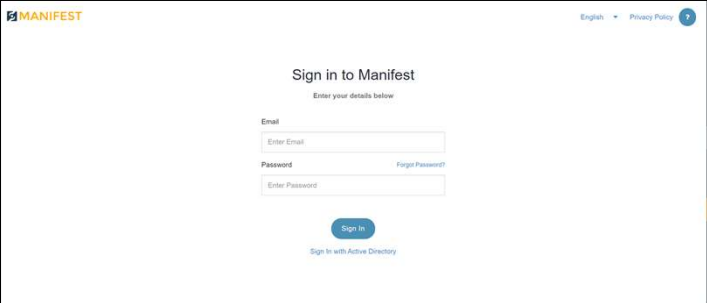
Manifest Client Portal Login

After you receive your Welcome Email and set your password you will be presented with a Login page where you need to log into the Client Portal.

Enter in your email and password to login to your Client Web Portal. If your client is configured for Active Directory login, you may sign-in with your Active Directory Account.

If you forgot your password, select the Forgot Password link to enter your email address and you will be sent a link to reset your password.

CUSTOM DOMAIN SETTINGS
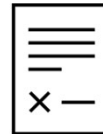
Customer license agreement

If the Client Admin has configured a customer EULA via the Client Portal, users will be required to agree with the customer EULA prior to continuing to log in.
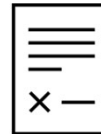
USER PERSONAL INFO

Upon initial login you will be prompted to update you User Personal Information and agree to the Taqtile, Inc. End User License Agreement.

If you are the Client Administrator of the Manifest domain you will be prompted to agree to the Taqtile Master Subscription Agreement.

User personal info

First Name*	Kirsten
Last Name*	Austin Google
Title	Title
Avatar	Add file

○ I agree to the **Taqtile, Inc. EULA**

Cancel   Save

User personal info

First Name*	Kirsten
Last Name*	Austin
Title	Title
Avatar	Add file

Master Subscription Agreement

This Master Subscription Agreement (the "**Agreement**") governs your access and use of services provided by Taqtile, Inc. ("**Taqtile**") and is effective between you ("**Customer**") and Taqtile as of the date of your acceptance of this Agreement (the "**Effective Date**").

YOU ACKNOWLEDGE THAT YOU ARE ACCEPTING THIS AGREEMENT BY: A) CLICKING A BOX INDICATING ACCEPTANCE OF THIS AGREEMENT; B) EXECUTING

○ I have read and agree to the terms of the Taqtile, Inc. Master Subscription Agreement

Cancel   Save

ROLES + PERMISSIONS

Understand the overall Manifest roles and what each roles permission includes for the Client Web Portal.

*** Permissions granted in the web portal don't automatically translate to the 3D Client, iPad or Android applications.*

*** All roles include access to Connect via the browser, client applications, or both*

*** Viewer is automatically included for Authors and Opertors so there is no need to assign 'Viewer' to users with either of those roles*

MANIFEST ROLES

security
→ This role is responsible for user management: creating users, assigning roles/permissions, and overseeing license allocation. Security admin is the only user with permission to add, delete, deactivate users; reset passwords, or force two-factor authentication for users. The Security Admin role also contains direct access to data logs to evaluate or audit domain activity.

admin
→ This role's access is primarily via the browser application with permissions to configure domain settings and create domain entities such as locations, asset classes, and assets. Using the Client Portal, the Admin role has access view status of jobs, job history, and general reporting. Users with "Admin" role only, do not have access to most key features and views within client applications on 3D or Mobile.

author
→ This role has the access to create entities such as locations, asset classes, and assets; upload and edit 3D models; and to create and edit templates. Users responsible for authoring job templates must be assigned the Author role.

operator
→ This role has the access to create, perform, and review jobs in Manifest. Users responsible for operating jobs guided by Manifest or reviewing and resolving 'faults' must be assigned the Operator role.

viewer
→ This role has 'view only' access to view all doamin data (asset, location, jobs, etc.), preview templates on device applications, and access general reports.

map designer
→ Currently not an active role / no need to assign to a user

map viewer
→ Currently not an active role / / no need to assign to a user

SECURITY ADMIN ROLE

The Security Admin manages users and roles, password requirements, 2FA Authentication and can access logs

SECURITY ADMIN CAN:

- Add, View, Edit and Delete Users
- Update User Permissions
- Reset Passwords on Users Behalf
- Deactivate Users
- Enable 2-Factor Authentification
- Export Users to Excel / CSV
- View Client Settings
- Set Password Security Rules
- View Logs

SECURITY ADMIN CANNOT:

- See Locations
- See Asset Classes
- See Assets
- See Templates
- See Jobs
- See Meter Units
- See Measurements
- See Connect
- See Marketplace

security

SECURITY ADMIN SPECIFICS

- When the Manifest domain is originally provisioned the Admin will also be assigned the Security Role

- As the Security Admin you are responsible for adding new Users

- There can be more than (1) Security Admin but ONLY a Security Admin can assign another user a Security Role

- There always has to be (1) Security Admin assigned as a User Role. You will be unable to deselect the last Security role without assigning a new one.

- Only a Security Admin can add another security Admin
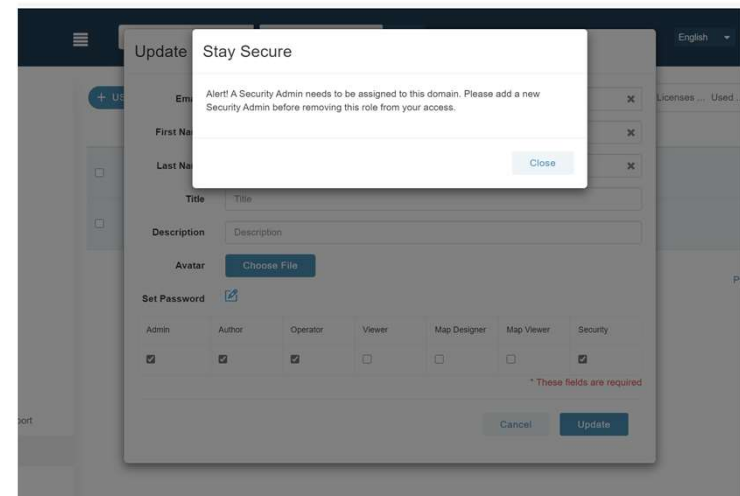
ADMIN ROLE

The Admin role is the Manifest Client Portal Superuser. ***Admin in the 3D client do not have access to many features.

ADMINS CAN:

- Create, Edit and Delete Locations and Child Locations

- Create, Edit, Delete and Restore Asset Classes along with upload documents, images, etc.

- Upload and manage 3D models

- Create, Edit, Delete Assets

- Download and Print Asset Tags and Step Alignment tags

- Create, Edit, View, Download Templates

- Add, View, Edit, Assign and Jobs to Operators

- View Job History, Evidence Notes, Fault Flags and Download Job History Report into Excel for further review

- Create, Edit and Delete Meter Units

- Create, Edit and Delete Measurements

- Add, Edit and Delete IoT Mappings if applicable

- View and Export Meter Evidence Report

- Use Connect / Direct feature

- Import templates from Marketplace

- View Client Settings and Custom Configurations

ADMINS CANNOT:

- View or Add New Users to the Client Portal

- Update Permissions of Users

- Set Password Requirements within Client Settings

- Enable 2-Factor Authentication

- View User Logs

admin

AUTHOR ROLE

The Author Role allows for the creation of the content in the Manifest Client Portal

AUTHORS CAN:

- Create and Edit Locations and Child Locations

- Create, Edit, and Restore Asset Classes along with upload documents, images, etc.

- Upload and manage 3D models

- Create Assets

- Download and Print Asset Tags and Step Alignment tags

- Create, Edit, View, Download Templates

- View Jobs

- View Job History, Evidence Notes and Download Job History Report into Excel for further review

- View Meter Units

- View Measurements

- View and Export Meter Evidence Report

- Use Connect / Direct feature

- Import templates from Marketplace

- Edit Profile Page

AUTHORS CANNOT:

- Delete Locations or Child Locations

- Delete Asset Classes

- Edit or Delete Assets

- Add, View, Edit, Assign and Jobs to Operators

- View or Resolve Fault Flags in Job History Report

- Add, Edit or Delete Meter Units

- Add, Edit or Delete Measurements

- Add, Edit or Delete IoT Mapping

- See Users

- See Client Logs

author

OPERATOR ROLE

The Operator Role allows for the "doing" of the jobs in the Manifest Client Portal

OPERATORS CAN:

- Create and View Locations and Child Locations

- View Asset Classes and View documents and images

- View 3D Models

- View Assets

- Download and Print Asset Tags and Step Alignment tags

- View Templates and view step notes

- Download Templates to PDF / Excel and view 3D model Preview

- Add, View, Edit, Assign (to himself or others) and Jobs to Operators

- View Job History, Evidence Notes, Fault Flags, Resolve Fault Flags and Download Job History Report into Excel for further review

- View Meter Units

- View Measurements

- View and Export Meter Evidence Report

- Use Connect / Direct feature

- Edit Profile Page

OPERATORS CANNOT:

- Edit or Delete Locations or Child Locations

- Create, Edit, and Restore Asset Classes along with upload documents, images, etc.

- Upload and manage 3D models

- Add, Edit or Delete Assets

- Add, Edit, Delete or Copy Templates

- Delete Jobs

- Add, Edit or Delete Meter Units

- Add, Edit or Delete Measurements

- Add, Edit or Delete IoT Mapping

- Import templates from Marketplace

- See Users

- See Client Logs

operator

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VIEWER ROLE

The Viewer Role allows for the viewing of content Manifest Client Portal

VIEWERS CAN:

- View Locations and Child Locations

- View Asset Classes

- View Asset Class Files / Documents

- View 3D Models

- View Assets

- View, Print and Download Asset Tags and Step Alignment Tags

- View Templates and view template notes

- Download Templates to PDF

- View Jobs and Jobs in Progress

- View Job History Report (and evidence notes) and download to Excel, CSV or PDF

- View Meter Units

- View Measurements

- View Meter Evidence Report and download to Excel/CSV

- Use Connect / Direct feature

- ViewProfile Page

VIEWERS CANNOT:

- Add, Edit, or Delete Locations or Child Locations

- Add, Edit or Delete Asset Classes

- Add, Edit or Delete Assets

- Add, Edit, Delete 3D Models

- Add, Edit, Delete Templates

- Add, Edit, Assign Jobs

- Add, Edit, Delete Meter Units

- Add, Edit, Delete Measurements

- Add, Edit, Delete IoT Mapping

- See Users

- See Logs

viewer

NAVIGATING – THE BASICS

Understand the UI basics for navigating the Client Web Portal

Key icons for Manifest Client Portal UI

Icon Glossary

Menu Tool

Select to collapse or expand. Select +
Hold + Drag to move the Menu bar.

Log Out

Log Out of the Manifest domain

Help

Support mail function if help is needed or send a
bug report with images

Profile Page

Shows the users profile information including
name, title, Manifest role and email address

Client Settings

Client settings where an Admin + Security Admin can update a
company logo, set password guidelines, customize messages,
enable 2FA and implement specific security rules. ** What
the Admin vs. Security Admin sees in these settings differ

HELP

Utilize the Help section to assist in troubleshooting an issue. You can either:

- Send a support email to manifestsupport@taqtile.com by tapping on the Suppport menu item in the help dropdown.

- Submit a Bug Report
  - Select Bug Report
  - A form will pop up and you will be prompted to enter:
    - Summary: Brief Summar of the issue you are encountering
    - Description: Description of the problem. Please be as specific as possible.
    - Files: Screenshots, Video images or anything else that can help in troubleshooting. You can add multiple files by selecting all the files at once.

PROFILE PAGE

Every user has a Profile page. If you click on the Profile page you can:

- View your profile specifics including your Name, Title, Roles and Email address

- Clicking on "Edit" allows the user to:
    - Update their First Name, Last Name
    - Update their Avatar
    - Change their password

INTERNATIONALIZATION

The Client Web Portal now provides internationalization. We offer the portal in both:

- French

- Japanese

To translate the portal, simply choose the dropdown in the top right-hand corner of the portal and select the language you desire.

Note: Coming soon! Spanish and Portuguese
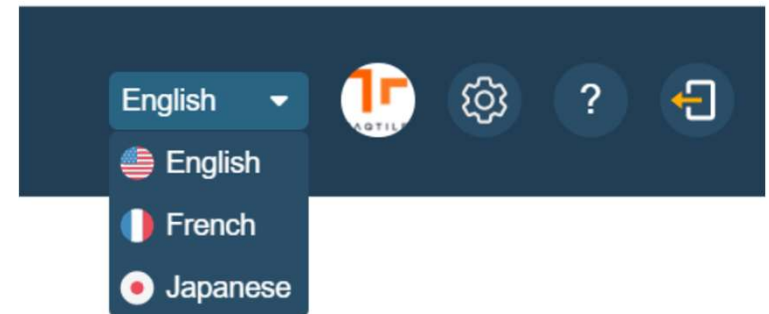
CLIENT SETTINGS

Client Settings is available to the Admin and Security Role and it's the area where several areas can be configured. Outlined below shows these client settings and what roles have access to each area.

*** As an Operator, Author, Viewer, Map Designer, Map Viewer you do not have these settings**

- Profile `admin` `security`
    - Update your client name
    - Update your company logo
- Password Security Roles `security`
    - Prevent Re-use of User Email for: Area to set limits on when a user can use their email address again.
    - Session Timeout: Area to set time limit to when the use will be auto-logged out of Manifest.
    - Enable 2FA: Area where you can set up 2-Factor Authentication
- Custom Message Configurations `admin` `security`
    - Customize Default Welcome Message
    - Enable and customize EULA
    - Enable and customized Field of View Messaging
- Server Configurations `admin` `security`
    - Area to configure STUN /TURN server configurations

- IoT Settings `admin` `security`
    - Area to integration IoT data with API info
- Dynamic CRM Integration `security`
    - Area to integration with a companies CRM data
- Active Directory Configurations `security`
    - Are to set up Active Directory
- Object Reference Password `admin` `security`
    - Printed QR Code and Set Alignment Tag Size: Area to update the size of the QR Code and Alignment Tag in mm. (Default is 56mm)

DATA HEIRARCHY
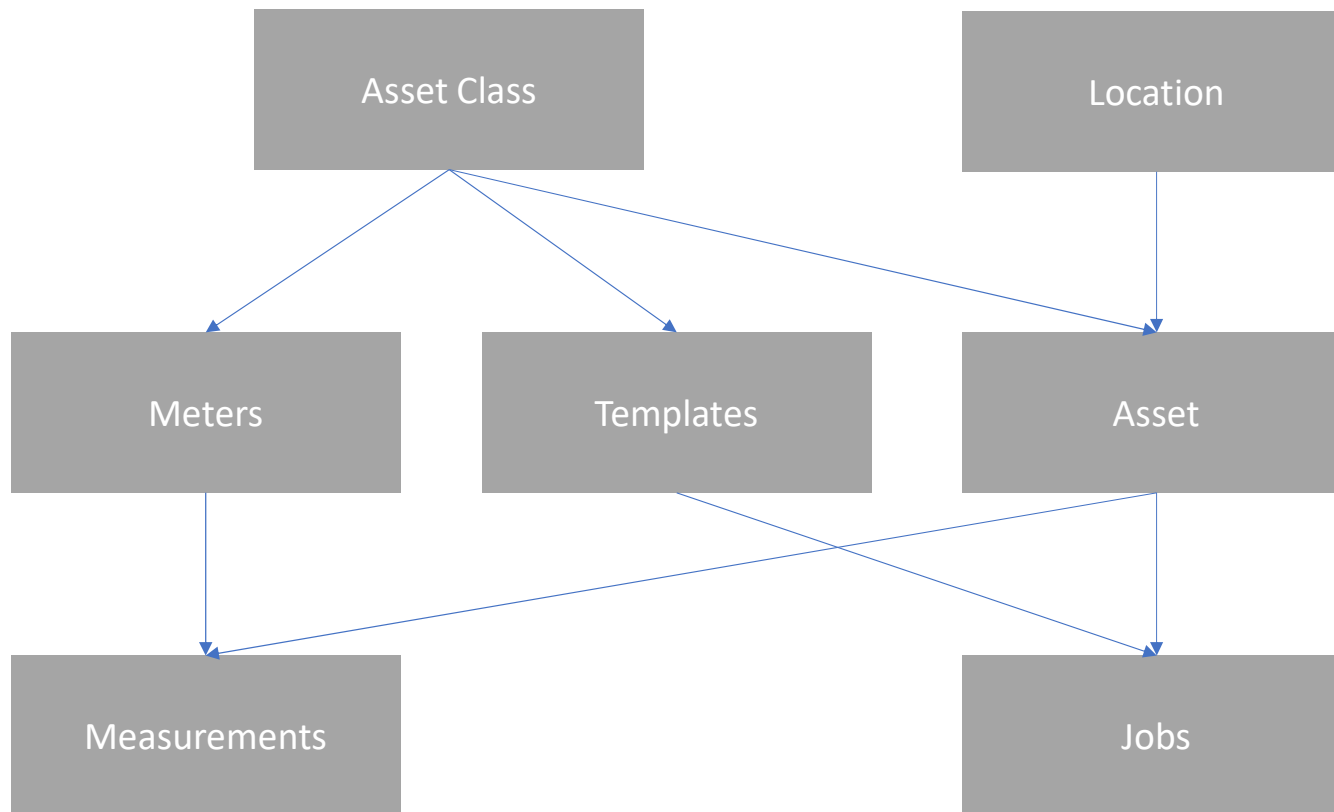
ASSET VS ASSET CLASS
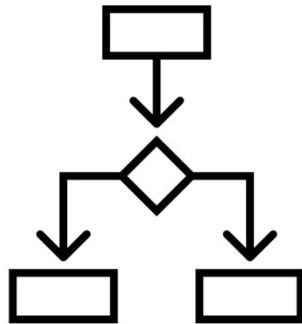
- Assets are registered under an Asset Class and associated with a Location.

- Templates, Documents, and Meter are all configured at the **Asset Class level** and any assets registered as that Asset Class inherit that same data. Conversely, changes to this data are also inherited by the Asset Class.

- An asset represents a unique item – likely with a serial number. It will contain its own service history, job queue, and IoT data.

- Each registered asset must be assigned an asset tag ID generating a unique QR code to be printed and placed on the asset.

- The asset tag also serves as the primary point of reference for all spatially anchored content (3D step-markers, pen notes, meters, and so on). For this reason – **it's critical that the placement of the QR code on an asset is consistent for all assets of that same class.**

MAIN MENU & FEATURES

Main Menu and review of primary app features

Main Menu

Locations
Locations are 'work sites' where you would manage assets and jobs

Asset Classes
An Asset Class would be a piece of equipment to do a procedure over/

Assets
An Asset is an unique piece of equipment

Templates
Procedures created by authors

Jobs
Jobs that are assigned to be completed

Jobs History
History of Jobs completed

Value Lists
Lists to be used for customized evidence in authored procedures

Meter Units
A unit set up to create and track a Meter. Example: RPM or Power

Measurements
Represents any meter readings (manually input or consumed by sensors) for an asset

Meter Evidence Report
A downloadable report that shows all meters as part of a completed job

Users `security`
View of all the users that have access to the client web portal.

Connect
Chat with other users, call users, share docs, send voice notes

Marketplace
A place where you can share content and import content into your own domain.

Logs `security`
Outlines all users client portal activity and is downloadable if needed. **Only available to the Security Admin Role

Command Strip Main Menu

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LOCATIONS

- Visit the locations screen to view locations that have been created along with the associated child locations and data. Additional actions available:

  - Add new locations

  - Delete location

  - Edit location

  - Add / Edit Location Models

  - View / Add / Edit Child Locations

  - View / Link out to Associated Assets to this Location

- Child locations are sub-locations to the Parent. An example of this might be configuring a location site to be the "Parent" and then buildings within that site to be "Children." **To view child locations, select the arrow to expand the view.**
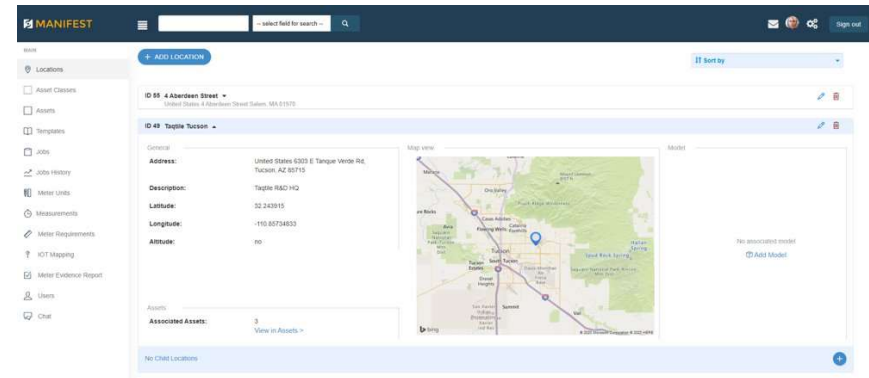
LOCATIONS
Create a new location

- At least one location must exist in your application. This will be required to view the Job Board, generate assets, and create jobs. Locations are 'work sites' where you would manage assets and jobs.

  - Creating a new location requires location name and address

  - Upon entering Location address --> select "Find" and the latitude and longitude will auto-populate and a map of your location will appear.

  - There is an altitude field that is included but not required.

LOCATIONS
Adding a model to a location

- Add a location model under the Models --> Add Models under the Location you just created.

- Upload a "Zip Archive" file and update the location.

- Reference the "Accepted File Types and Specifications" to see what model file types are acceptable
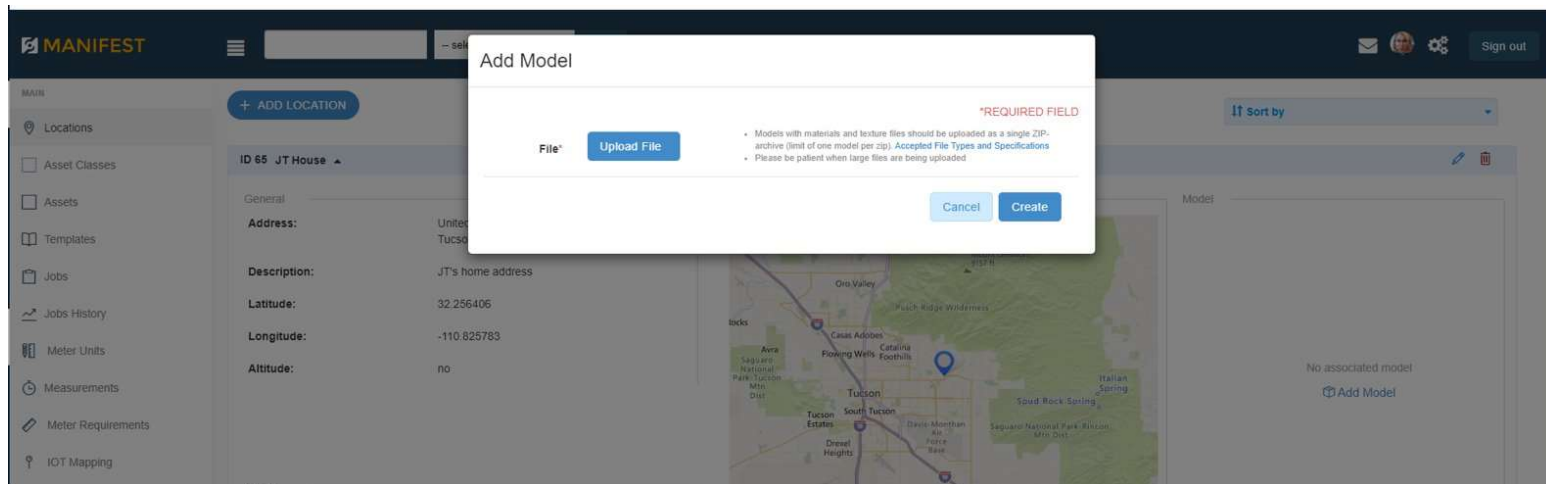
LOCATIONS
Secure Location + Force Offline

- By selecting Secure Location you give the option to make the location secure

- Once Secure location is selected you can select evidence you want to be restrict be taken when using the client Manifest application

  - ie: If Video is checked off --> when you are onsite at this location and you try to record video you will not be allowed

- If a location is marked as secure then it will be badged on the locations listing with a red "S"

Update Location

Location Name*	Taqtile Office
Location Address*	United States	107 Spring Street Seattle, WA	Find
Coordinates*	47.6074649940537	-122.33195999535:	Altitude
Description	Taqtile, Inc. Corporate Office

Secure Location ☑

Restrict Evidence
- ☐ Text
- ☐ Audio
- ☐ Video
- ☐ Photo
- ☐ Meter
- ☐ Pen
- ☐ Connect

Force Offline ☐

Cancel   Update

ASSET CLASSES

- An asset class would be a product or equipment that your company would like to author procedures over. It would include a make and model vs. an asset which would have a unique serial number and live under the Asset Class level. Asset classes MUST be created through the client portal and is required to create assets. Visit the Asset Class screen to:

  - Add new asset class

  - Delete asset class

  - Edit asset class

  - Upload / Delete 3D model files

  - Upload / Delete PDF Documents associated to Asset Class

  - Upload / Delete thumbnail image for Asset Class

  - Add a Meter and view associated meters already created

ASSET CLASSES
View / Manage Asset Classes

- To view Asset Class details, select the > icon in the first column to expand the details view.

- From this view you can see the asset class details as well as add, delete, or download files for Thumbnail and Documents.

- To upload a thumbnail image, which will be displayed to users within the application for the asset class and all associated assets, select "Add file" under Thumbnail image. There is a limit of 1 image per asset class.

- To upload a Document, select "pencil icon" under Documents/Manuals. There is no limit to the number of manuals that can be uploaded.

- Click on the Assets number to see the Assets associated with this Asset Class and use the arrow to go to those filtered Assets

- Click on the Templates number to see the templates associated with the Asset Class and click on the arrow to go to that filtered Templates page

- Add and view Meters
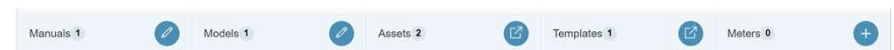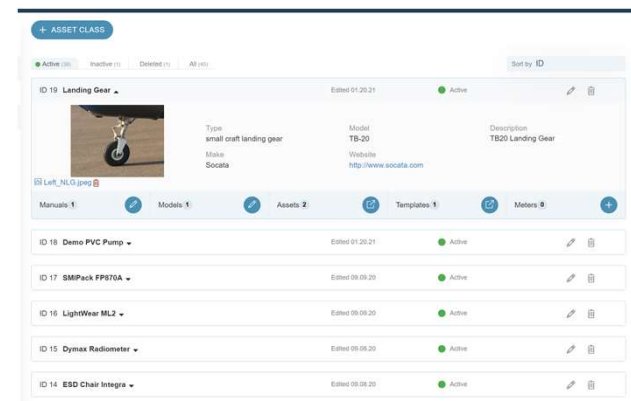
ASSET CLASSES
Managing / Uploading 3D Models

Once you have uploaded a 3D Model to the asset class, the following actions area available:

- Preview the model and see its size in relation to Mani who is holding a (1) Meter stick.

- Enter Edit Mode where you can:

  - Move the Model

  - Rotate the Model

  - Resize the Model

- Save changes from Edit Mode that will set the coordinates [position, rotation and scale]

- Click on the Edit pencil and manually edit the coordinates [position, rotation and scale]

- Save and create different views of the same model [ie: if you want to show the top, back or bottom]

- Download the model files into 3 different formats – the original source, .gltf file or a .glb.
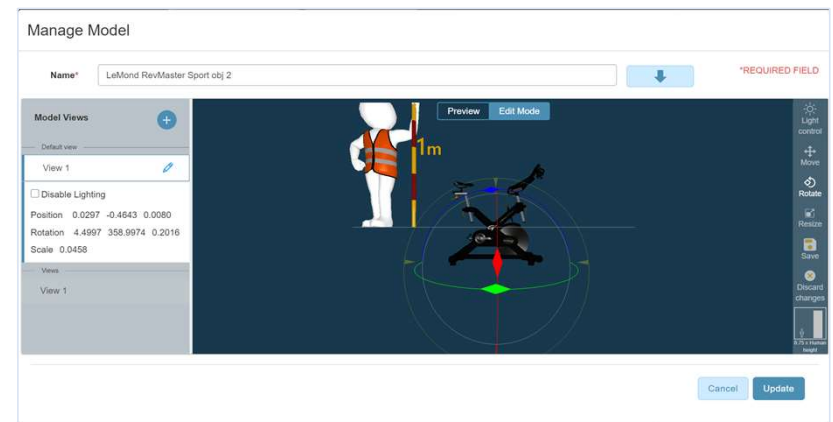
ASSETS

- An asset is any unique piece of equipment that you'd like to perform jobs on. Different from an asset class, an asset would contain a serial number.

- When creating an asset, you will be required to assign it an asset tag ID [Holotag] what will be used to generate a unique QR code for the asset.

- The Asset Tag / QR Code should be printed and placed on the asset. The tag placement must be consistent for all assets of any specific asset class. All 3D content is placed respective to tag. The unique tag also stores data for that asset: work orders, jobs, job history, meter readings, etc.

- All authored templates, documents/manuals, 3D models, are created and managed at the asset class level; whereas job history, jobs and meter measurements are managed at the asset level.

ASSETS
Create a new asset

- Before creating a new asset, be sure you have already created the respective asset class and location for that asset, then:

  - Select "Add new asset"

  - You will be prompted for the following information:

    - Serial Number: asset serial number

    - Internal ID: optional if there is an internal reference or ID

    - Department: optional if relevant

    - Criticality: level of criticality for this asset

    - Status: status for this asset (can be updated and managed as status changes)

    - Location: which location this asset is located

    - Asset Class: Select specified asset class

    - Asset Tag ID: a unique ID you assign to generate the QR code (can be arbitrary number system or can use your own asset tag system)

Create Asset

(!) Before creating an asset, please be sure both the asset location and asset class have already been created

Serial Number*	Serial Number
Internal Id	Internal reference, if applicable
Department	Internal department reference, if applicable
High Criticality	○
Status*	-- select an option --
Location*	-- select an option --
Asset Class*	-- Select an Asset Class --
Asset Tag Id*	This value will be used to create a unique QR code

* These fields are required

Cancel   Create

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ASSETS
Holotags / Step Alignment Tags

- Under the Tag option you have the ability to print or download your QR code or a step alignment QR code.

    - Note: QR code size settings are a global setting managed by the Admin in the Client Settings. We recommend a minimum 56mm square but this can be adjusted – it should be set and applied before QR codes are printed.

    - QR Code default size in the client settings is 46mm

    - Maximum printed QR code size is 190mm

    - Printing the QR code will ensure the correct size dimensions are set.

- Link out to associated jobs, jobs history or measurements

- Add IoT Mappings that are associated with this Asset

TEMPLATES

- Templates are step-by-step job checklist that can be performed over an area or piece of equipment.

- Templates can be authored solely in the Manifest application while a user performs their work, OR pre-authored in the Client Web Portal where the author then manages the 3D authoring (placing of 3D step markers, lines and content) wearing the Head Mounted Device.

- Available functions:

    - View templates and notes

    - Add new template

    - Edit existing template

    - Copy existing template

    - View the 3D model + steps of your templates

    - Delete template

    - Download the template to PDF Format

    - Export template to the Marketplace

TEMPLATES
Job Step Authoring – Step by Step

👉 Once you create a template, it will default to a prompt for the first step. To add additional steps, select the green button "Add new step".

🙿 To add step notes, under Actions select the "Manage Notes" icon. Note icons will appear in the Notes column to indicate the note types associated with each step.

🔍 To view the notes, select the > icon to expand the section to reveal the note content for each step.

⬚ To reorder the steps, simply drag and drop the steps.

🗑 To delete a step, select the trash can.

📋 Add Meter Requirements to any step by selecting Meter Requirements under "Actions".

💾 Don't forget to select "Update" to save all changes.

TEMPLATES
Create a new job template

- Before creating a new template, be sure you have already created the respective asset class, then:

    - Select "+ TEMPLATE"

    - You will be prompted for the following information:

        - Template Title

        - Asset Class

            - Select within the dropdown

- Once those (2) field are populated you can authoring your procedure by selecting the + STEP button and creating your 1st step.

TEMPLATES
Template Actions

Next to each template there are a number of actions that can be performed. They include:

- Edit Template – indicated by the pencil icon

- Delete Template – indicated by the trash can icon

- Duplicate – make a copy of the template (title will be appended with COPY OF at the front of the template name)

- Send to Marketplace – send the template to the Marketplace where it can be showcased and downloaded by other clients

- Export to PDF – export the template to a PDF doc
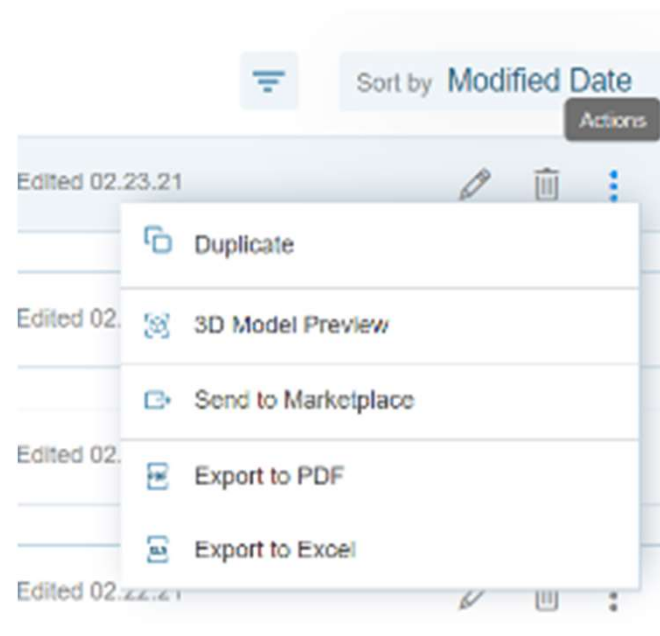
TEMPLATES
Adding note types

- When authoring a template you can add notes to a step using the "Manage Notes" button under Actions. Here you can add:

  - Text

  - Bookmark (.pdf)

  - Audio (.wav)

  - Video (.mp4, .MOV, .mpg, .mpeg)

    - Note: .MOV, .mpg, and .mpeg when uploaded will auto-convert to .mp4

  - Image (.png, .jpg, .jpeg)

  - Action Notes

    - Ability to Show/Hide a 3D model or Show/Hide a Meter

      - You can add a Meter Requirement from here as well

- Template Notes

  - Ability to embed a template into another template. (ie: Safety Procedure)

- Pen Notes (will only show if added in Manifest 3D – you are not able to add Pen Notes in the portal)

- Choice Notes

  - Ability to create paths a user would / could go down based on a result from the step they are working on.

- Once notes are added then they will show as icons on the Templates page

- Ability to Edit a Step Note is enabled and can be access by tapping the pen tool within the step itself to update accordingly.

- If Auto-play is toggled on then that note type will automatically plan and/or show to the user in the Manifest client on the Head Mounted device.

TEMPLATES
Step Note Specifications

- **Step Title / Description:** 100-character limit

- **Text Note(s): [350-character limit]** Notes that can further describe or provide instruction for this step.

- **Audio Note(s): [.wav format]** Voice Notes to further describe the step or instruct the user.

- **Video Note(s): [.mp4, .mpg, .mpeg or .MOV format]** Videos that can be added to further demonstrate the step. Multiple can be added.
    - Videos that are uploaded in any of the above formats will be auto converted to .mp4 files format
    - Video file uploads are limited to 500mb

- **Image Note(s): [.png, .jpg, .jpeg]** Image notes can be added further demonstrate the step through photos. Multiple can be added.

- **Bookmark(s) [.pdf]** Bookmarks are notes that bookmark a specific page in a PDF file. This can be useful for schematics, show useful info in brochures or manuals, etc. Please indicate the PDF and the page you want bookmarked.

- **Pen Note(s):** Pen note is a 3D ink drawing around a specific area. If you would like this - please indicate where the pen should be drawn. ** This can only be done in the Device and not configured in the client portal.

- **Action Note(s):** Action Notes allow you to add an automatic action to your step. Currently, the action note type available is for 3D Model or Show a Meter.

- **Template Note:** Template Notes allow you to embed one template into another template. Please note: You are only after to embed (1) template per template step. You are not able to create a Template Note and a Choice Note in the same step.

- **Choice Note:** Choice Notes allow you to create paths for an Operator to choose from to continue through the procedure. You are not able to create a Choice Note and a Template Note in the same step. Limited to 5 choices.

TEMPLATES
Step Note Best Practices

- See previous slide for accepted file formats for each note type.

- Videos and image notes should be taken in landscape mode. Optional specs:

    - 720p

    - 1280 x 720 pixels

    - Aspect Ratio 16:9

- If you are recording audio or video using a device other than the HoloLens, be sure the speaker speaks 'loud and clear' directly into the mic for best results.

- If preparing content outside the 3D application, below are tips to enhance your content:

    - Add audio narrations and convert to videos

    - Take PPT slideshow and convert to videos with narrations and captions

    - Create eye catching note call outs through tools like PPT that can be uploaded as image notes. Great for warnings and alerts!

- Try to keep content succinct and non-repetitive to optimize the experience and efficiency of the User / Operator.

TEMPLATES
Customized Evidence

- Admins/Authors can create customized value lists that can be used within a template

- Create the Value list under the Value list Option

- Create a template and select the value list(s) you want to use

  - You can select as many customized value lists as you want

- Allow for the customized evidence type to be a required piece of evidence to be left when doing the job.
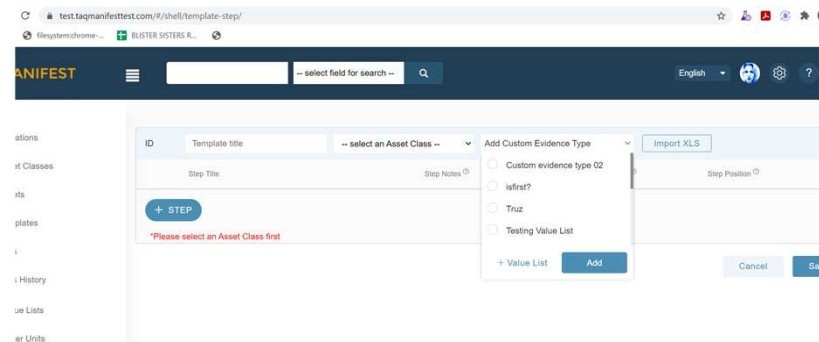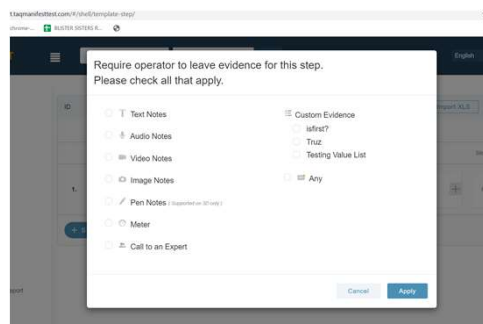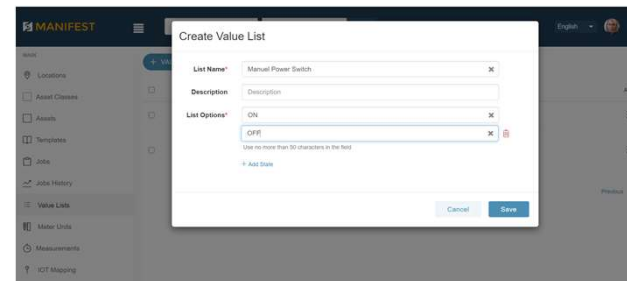
TEMPLATES
Required Evidence

- Authors / Admins can require evidence be submitted for specific steps in any job template.

- This setting must be done via Client Portal

- Simply select the + required evidence when authoring the template and select the type of evidence the operator should leave.

- Ability to multi-select several options

- Ability to select "Any" which gives the Operator the option of what type of evidence he / she would like to leave.

TEMPLATES
Step Positions

- 3D Markers and step line leaders are best authored using the HoloLens. However, there are a few tools we've made available in the Client Web Portal.

- To add a 3D Marker or Line Leader, simply select the + icon in the Highlights column. This is especially useful if you have authored a step in the Head Mounted Device and wish to update additional steps to those same position / rotation coordinates.

  - Enter the type as Line or Marker

  - Enter the Position and Rotation coordinates accordingly.

- You can also delete step markers and line leaders via the web portal by selecting the trash can icon.

Manage Template Highlights

Marker

Lines +

Line 1

Line 2

Line 3

Line 4

Position 0 0 0

Rotation X Y Z

Cancel   Save

TEMPLATES
Duplicate / Copy – Highlights + Markers

- When authoring inside a template in the web portal you have the capability to duplicate and copy Markers and Highlights.

- This functionality is used if you want to have all the Markers and Highlights show in the same location.

- Under the Highlights section in the template simply select the Copy icon in the Step you want to copy

- A modal will open up and you will be prompted to select the Steps in the template that you want to copy.
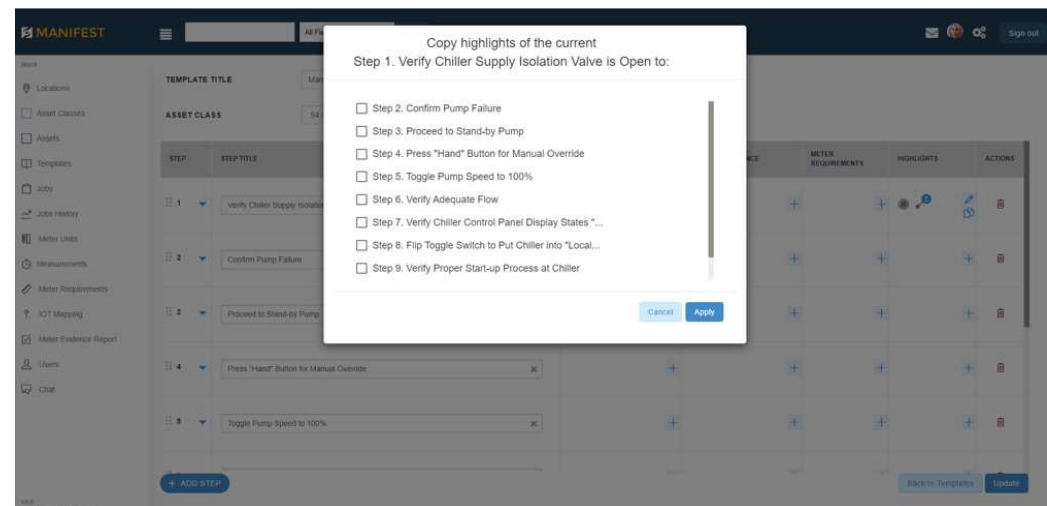
TEMPLATES
Import / Export Capabilities

- An author has the ability to import a base-line for a template using an Excel spreadsheet

- Obtain the standardized spreadsheet by selecting the "+ Import XLS" located next to the "+Template" button

- A modal will open providing instruction for the import structure and provide you a Sample Table to download and populate for re-upload.

- User will be prompted to enter in a Template Title and Asset Class prior to uploading the XLS file.

- Populate the Export template in the following manner:

  - Column A = Step #

  - Colum B = Step Title

  - Column C = Text Note *

    - Text: "Text Note Title": Text Note Body

** At this time only text notes are accommodated for step note upload

TEMPLATES
Simultaneous Updates to Templates

- Two users are unable to be edit a template at the same time to avoid overriding the other users edits.

- If a user wants to edit a template that another user is editing, they can make a "request to edit"

- The editing user can then decline the requesting user access or accept the request and save / or not save the template prior to passing it over.

- An animated pen icon will not display on templates that are being edited on the 3D client as well

Edit Request Denied

Your request to edit this template has been denied. Please check back later.
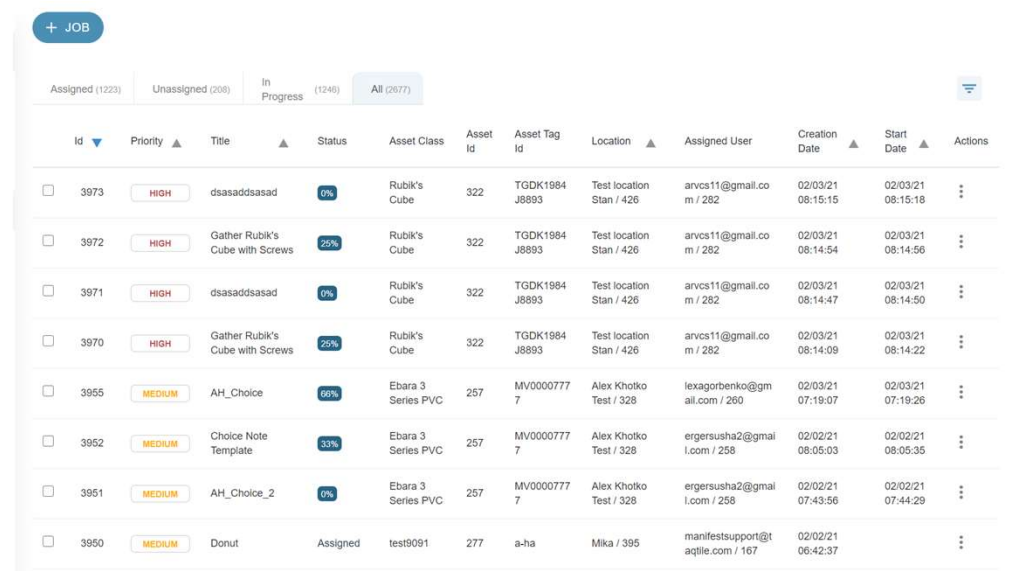
Edit Request Accepted

Your request to edit this template has been accepted

Edit

User **manifestsupport@taqtile.com** has requested to edit the template

How would you like to proceed?

- ○ Save your changes and release the template
- ○ Do not save changes and release the template
- ○ Decline the request and continue to edit

Apply

JOBS

- The Jobs page shows what status a job is currently in:
  - Assigned
  - In Progress
  - Completed

- Click on the Job Ttile to expand and see where the user is in completing the job

- Further expand the Step and see if the user has left evidence as part of the job.

- Add a Job and assign jobs to users or leave them assigned. These will show up on the Head Mounted device job board.

JOBS
Job History Report

- The Job History Report shows the Jobs that have been completed.

- Expand using the arrow under the ID column by selcting the Job title to see a breakdown of the time it took to complete a job step.

- Download the specific job as an Excel, CSV or PDF

- Use the "Link to template" link to open the template that the job is associated with.

	Id		Title	Location	Asset Class	Asset	Assigned User	Start Date	Completion Date	Job Duration (HH:MM:SS)	Actions
✅	6796		02Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:45:53	02/01/21 01:46:48	00:00:51	⋮
⚠	6795		02Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:39:39	02/01/21 01:39:58	00:00:14	⋮
⚠	6794		02Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:38:55	02/01/21 01:39:27	00:00:26	⋮
⚠	6793		01Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:38:46	02/01/21 01:40:05	00:00:15	⋮
⚠	6792		00Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:38:34	02/01/21 01:40:23	00:00:22	⋮
⚠	6791		02Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:32:01	02/01/21 01:32:39	00:00:32	⋮
⚠	6789		02Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:22:37	02/01/21 01:22:59	00:00:17	⋮
✅	6788		02Levels	Demo Land	Choo Choo / 68	0000001	57 / rick.grossman @taqtile.com	02/01/21 01:20:47	02/01/21 01:22:26	00:01:32	⋮

JOBS
Job History Report - Actions

- Use the Actions area (3 dots) to:
  - Link to the Template
  - Export to CSV
  - Export to PDF
  - Export to Excel

- Drill down into a specific job and you will be provided with the same options to download to XLS, CSV and PDF BUT also the ability to download to a ZIP file w/ all the associate evidence content.

- Content included in the download to ZIP file will be:
  - Video
  - Photo Images
  - Text Images
  - Audio Notes
  - Bookmark Pages

** Pen Notes, Meter Note, Model Action Notes, Choice Notes, etc. will not show in any download files
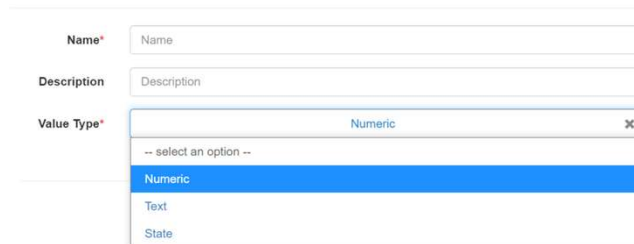
METER UNITS
Creating a Meter Unit

- Whether you are manually creating meters to simulate meter sensor data or managing live integration with IoT data – units will represent the possible unit types sensor data is reporting.

- A Meter Unit must exist before a Meter can be created.

- When creating a Meter you have (3) options for Value type:

  - Numeric (number value)

  - Text (ie: <100 F or >100F)

  - State (ie: ON / OFF)

- Once a Meter Unit is set up AND a Meter is associated to an Asset Class you can add a Meter to any template step.

METERS
Creating a new meter
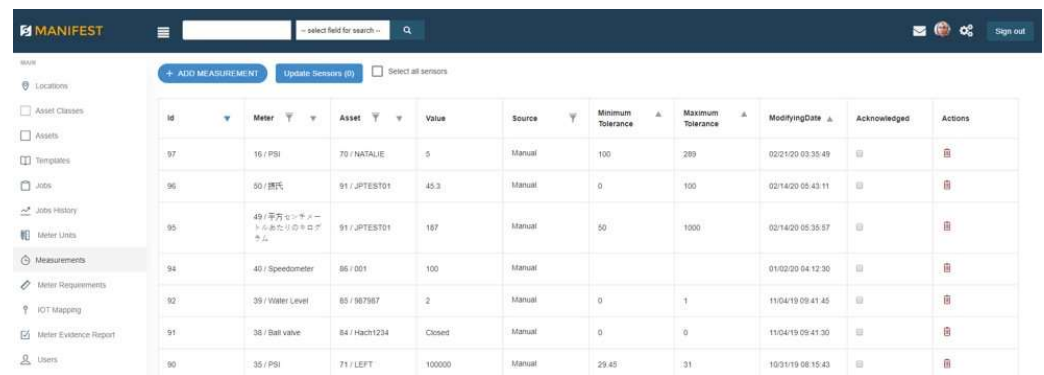
- Before creating a new meter, be sure you have already created the respective asset class:

- From the Asset Class page --> expand the Asset Class and Hit the + sign next to Meters

- You will be prompted for the following information:

    - Meter Name: this is displayed in the UI for all meters

    - Description: describes the meter type and is displayed in the UI

    - Unit Name: this is populated from unit types created under Meter Units

    - Unit Description: will auto populate

    - Asset Class ID: related to a specific asset class

    - Minimum tolerance: min tolerance value for range of acceptable readings

    - Maximum tolerance: max tolerance value for range of acceptable readings.

- Meter Position can be set using the 3D application.

MEASUREMENTS

- Measurements represent any meter readings (manually input or consumed by sensors) for an asset

- An admin can set the tolerance levels and if the reading goes outside the tolerance range, an alert will be triggered and displayed in the application. An operator can then acknowledge and address any issues.

MEASUREMENTS
Creating a new measurements

- To create a new measurement

    - Select "Add new measurement"

    - You will be prompted for the following information:

        - Asset Class ID: Select specified asset class

        - Meter ID: Select specified, previously created meter ID

        - Asset ID: Select the ID number for the asset (this is a Manifest generated ID value you can refer to on the Assets screen)

        - Value: Enter value that shouldbe displayed for this meter on this specific asset.

Create new measurement

Asset Class	9 / Elenco Snap Circuits Light
Meter	For Test July, 30 -3
Asset	98 / Aberdeen
Source	Manual
Value	ON

Cancel   Create

METERS EVIDENCE REPORT

- The Meter Evidence Report gives a high level overview of all the Meters with each job with in the domain

- You can download this Meter Evidence Report into Excel or CSV

Export CSV   Export XLS

User	Location	Asset Class	Asset Id	Template	Job Id	Job Status	Start Time	End Time	Job Step	Meter Flag	Me Na
13/Maureen Miller	Demo Refinery	Ebara 3 Series Centrifugal Pump	5/MSFT000001	93/a	272	Completed	05/16/19 12:58:43	05/16/19 12:59:17	3/III	true	Po
13/Maureen Miller	Demo Refinery	Ebara 3 Series Centrifugal Pump	5/MSFT000001	93/a	273	Completed	05/16/19 01:00:02	05/16/19 01:00:41	1/III'	true	Po
13/Maureen Miller	Demo Refinery	Ebara 3 Series Centrifugal Pump	5/MSFT000001	93/a	273	Completed	05/16/19 01:00:02	05/16/19 01:00:41	1/III'	true	RF
13/Maureen Miller	Demo Refinery	Ebara 3 Series Centrifugal Pump	5/MSFT000001	93/a	273	Completed	05/16/19 01:00:45	05/16/19 01:01:18	3/III	true	Po

CONNECT

- The chat features is available to allow Manifest users to communicate while using the platform and if an operator is conducting a job and needs assistance.

- Features includes:

  - Message between users

  - Call a user

  - Attach documents and send to a user

  - Send screenshots of what the user is seeing in the Head Mounted Device
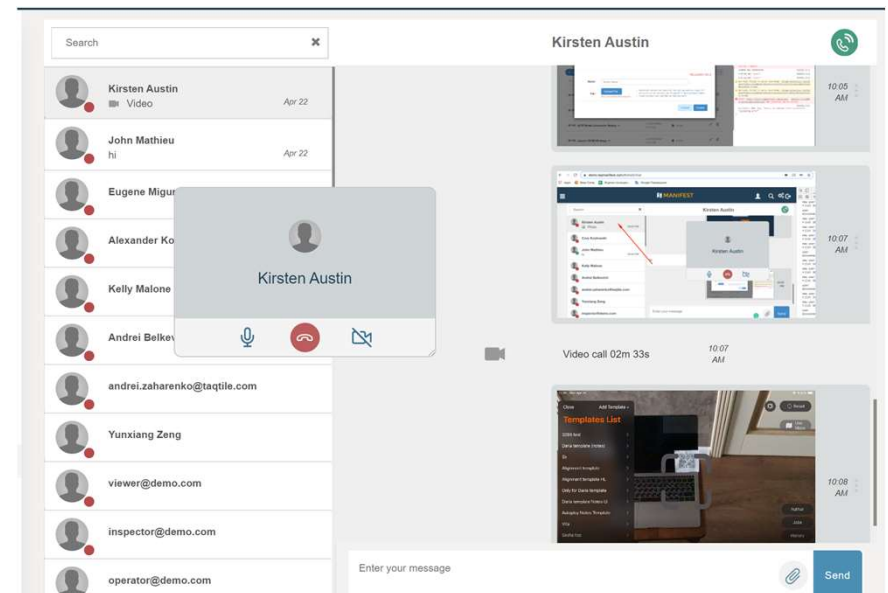
CONNECT
Group Chat Capabilities

- The group chat features is available to allow Manifest users to communicate as a group while using the platform and if an operator is conducting a job and needs assistance.

- Features includes:

  - Ability to create a group

  - Ability to Share docs within the group

  - Ability for the user to leave a group

  - Ability to edit the Group name
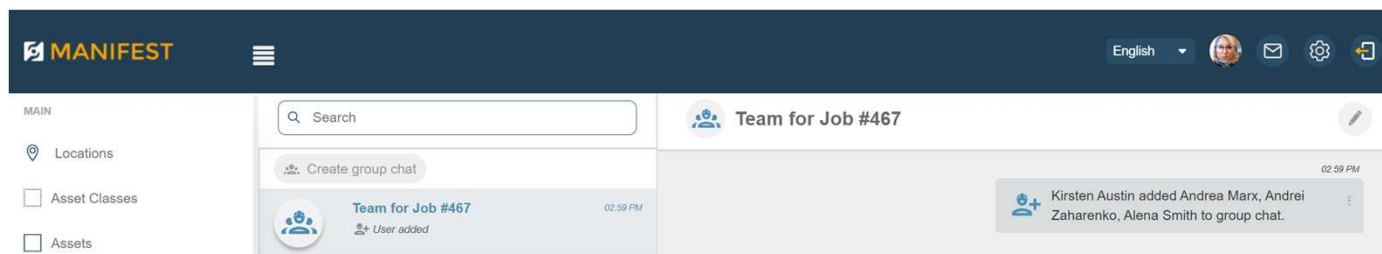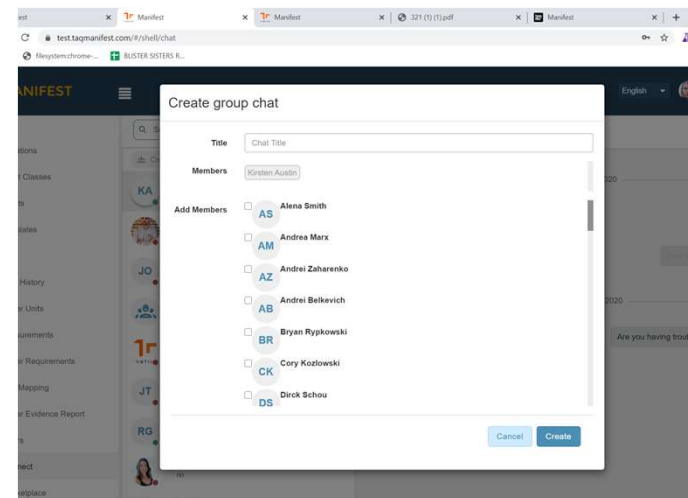
CONNECT
Troubleshooting

Manifest Connect provides a powerful tool to collaborate with team members. Powered by an industry standard WebRTC server, Manifest Connect enables text and video chats, file sharing, and advanced, real-time AR guidance.

Check you Network Connection.
A reliable network connection with enough bandwidth for all team members using Manifest Connect is fundamental to a good experience. The bandwidth required to use Manifest Connect is similar to the amount required for other apps using WebRTC such as Microsoft Teams and Zoom. A single audio/video stream consumes about 500kbps which a 2-way stream consumes about 1-1.5Mbs. The upper range of 1.5Mbps is required for video resolution of HD 1080P at 30fps.

Please find additional suggestions for troubleshooting Manifest Connect on the next slide.

CONNECT
Troubleshooting

Head Mounted Device Troubleshooting Tips

- **Have you accepted all application permissions?** Be sure you have accepted permissions for Manifest to access your Camera and Microphone. To check if you have these enabled, go to Settings -> Privacy on your device.

- **Has your session been disconnected from the server?** If you see a red circle icon on the account display of the command strip and a red WiFi icon to the left of the command strip, it indicates a weak connection. This can happen if you have awoken your device and relaunched an idle Manifest session. The application will attempt to reestablish a connection, and if successful will return a green circle icon on the command strip. If this does not automatically occur, restart the application to connect to the server again.

- **Are you over-taxing the network bandwidth?** Performance issues may be experienced if you are trying to run a Connect session while simultaneously loading content in Manifest – templates, image or video notes, etc.

- **Are you using the video or microphone for other features at the same time as your Connect call?** Connect sessions require the use of the device camera and microphone. For this reason, you may run into issues if you are attempting to use other features relying on these tools during a Connect session, e.g., voice messages, voice-to-text, or image and video notes.

- **Are you on a network that restricts UDP and TCP traffic?** If Connect consistently fails to connect, please check with your network administrator and ensure that your network is not restricting UDP and TCP traffic.

If the above does not correct the issue, there may be an underlying network issue preventing persistent connections to the Manifest server. In that case, please talk to your network administrator to investigate if there are any network outages or check with your service provider.

Client Web Portal Troubleshooting Tips

- **What browser are you using?** Please make sure you are using Chrome as your preferred browser and that it's up to date with the latest version

- **Does your PC device have a camera?** Manifest Connect calls won't connect to PC's that do not have cameras.

- **Have you enabled Audio and Video access in your Chrome Browser?** To check this please:
  - With Chrome open, click or tap the menu at the top right-hand corner
  - Choose settings
  - Go to Privacy and Security
  - Under Privacy and Security scroll down to the Site Settings
  - Choose the Camera or Microphone to access either setting
  - Scroll all the way down the page and open the Advanced link
  - Scroll to the bottom of the Privacy and Security secction and choose Content settings
  - Choose with Camera or Microphone to access either setting

- **Are you logged out of all other instances of Manifest?** You need to be logged out of all instances of Manifest which includes head mounted device, iPad, Browsers, Android, etc.

- **Are add-ons disabled?** Please make sure auto-play blocker add-ons are disabled? You can do this by:
  - Open a site in Google Chrome
  - In the address bar, click on the green padlock or info button
  - Click on Site Settings
  - Scroll down to find Ads
  - In the drop-down menu, CLick Allow
  - Close Settings tab

- **Is your camera being used by another application (ie: Teams, Skype, etc)?** Close out of other applications that might be accessing your camera and try again.

CONNECT
Troubleshooting

Are you still having issues? Then please try....

- Send a bug report within Manifest (logs will be captured and sent to Taqtile engineers for further diagnosis)

- Completely shut down the head-mounted device and restart

- Completely shut down both the PC and restart

- Please email manifestsupport@taqtile.com and outline the issues you are encountering along with:

  - Information on your firewall environment if applicable

  - Information on your proxy server if applicable

  - Information on your network, including if it is a corporate network (as corporate IT policies may be blocking connections)

  - Any other pertinent information around this issue you are currently experiencing

DIRECT

The Direct feature allows desktop / web users to remotely interact with a 3D user and assist them (Direct) when conducting a procedure. The desktop user can assist using the below features:

- Direct gives the ability for a remote desktop user to **point highlight** or **ink** in a 3D users environment

- Direct gives the ability for a remote desktop user to render **directional arrows** for the 3D user to guide their gaze

- Direct uses **eye tracking** to follow the 3D users' gaze and share with remove desktop (HL2 only)
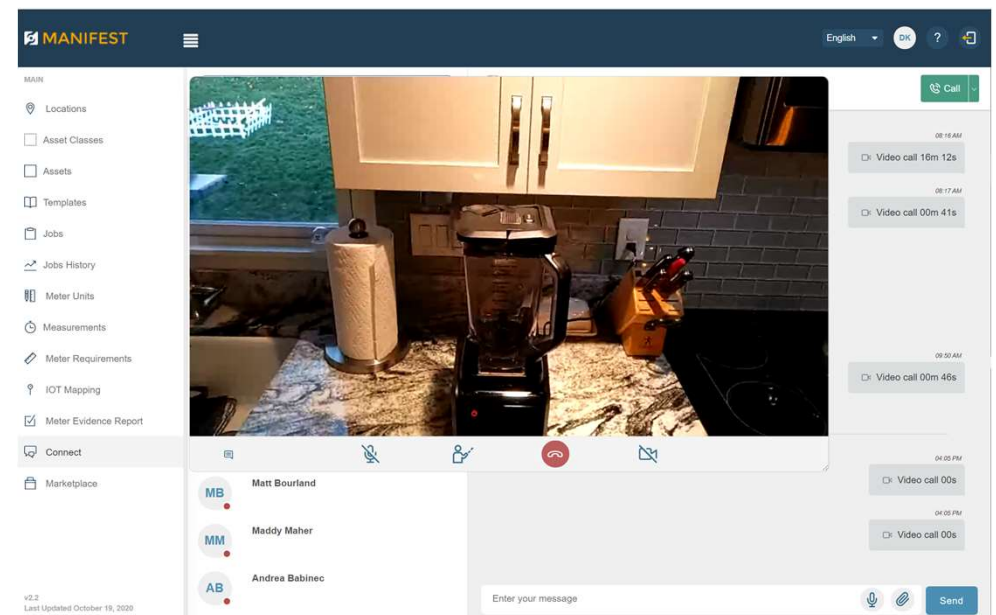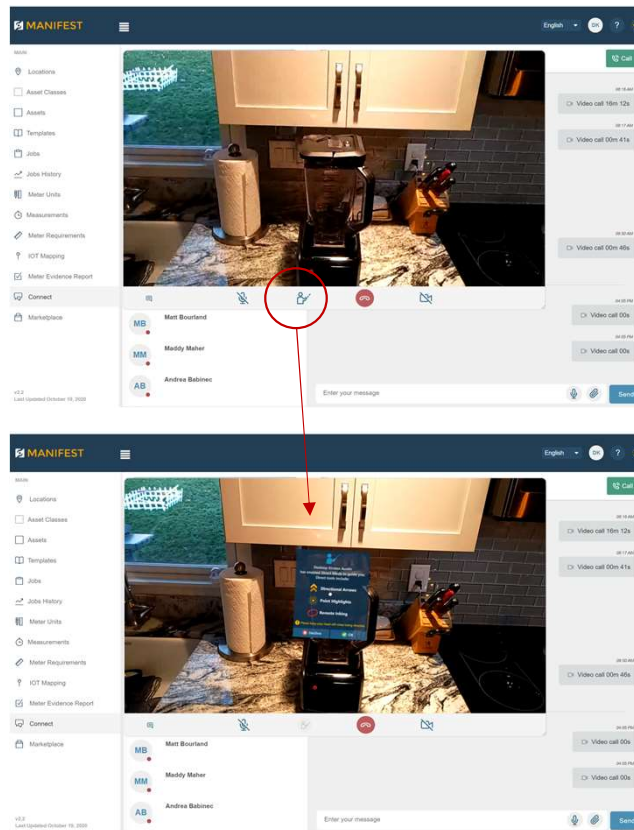
DIRECT

To use the Direct feature the 3D user calls a desktop user and share video and enables the sharing of holograms. When the desktop user answers the call the desktop user selects the "Direct" icon which sends a message to the 3D user asking for permission to Direct the user.

Once the 3D user accepts – the desktop user will now be in Direct mode where they can direct the 3D user by using point highlight, inking and or directional arrows.

A 3D user also has the option to decline the invitation to be directed.

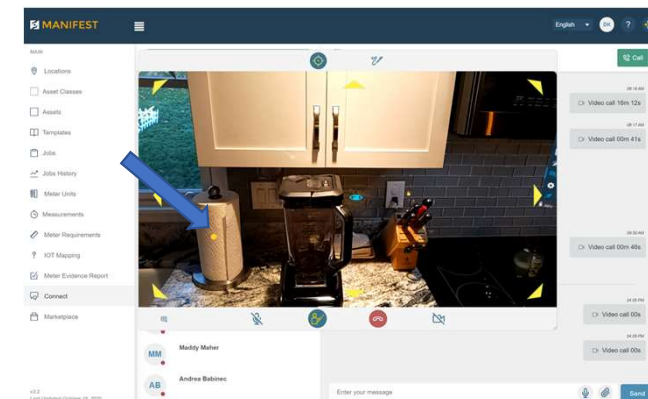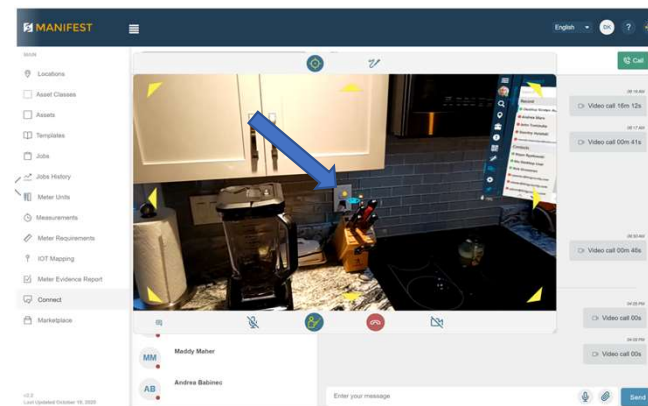# DIRECT
Directional Arrows

- As soon as the 3D user gives the web user permission to direct them the Direct screen will appear, tools will be enabled and directional arrows will show around the web screen.

- Select a directional arrow to direct the 3D user to move in the direction you would like. The 3D user will see an arrow on their screen to point them in the direction the web user wants.
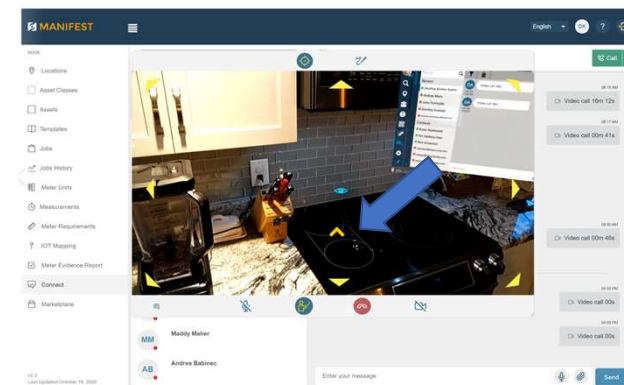
DIRECT
# Target

- Use the Target tool to Direct a user to a specific area

- When the target tool is being used a yellow dot will appear to the 3D user along with a sound directing the user into the direction they should be looking.

- In the image to the right here you will see that the web user is pointing the 3D user to the light switch in screen 1 and in then to the paper towel holder in screen 2.

DIRECT
Point Highlight / Inking

- When the inking tool is enabled the web-user can ink in the 3D users' direct space.

- The web user can point out and circle specific areas where the 3D user should be directing their attention.

- In the screen to the right of this screen you will see that the web user is directing the 3D user to look at the electrical receptacle and is indicating this by drawing a circle around it.
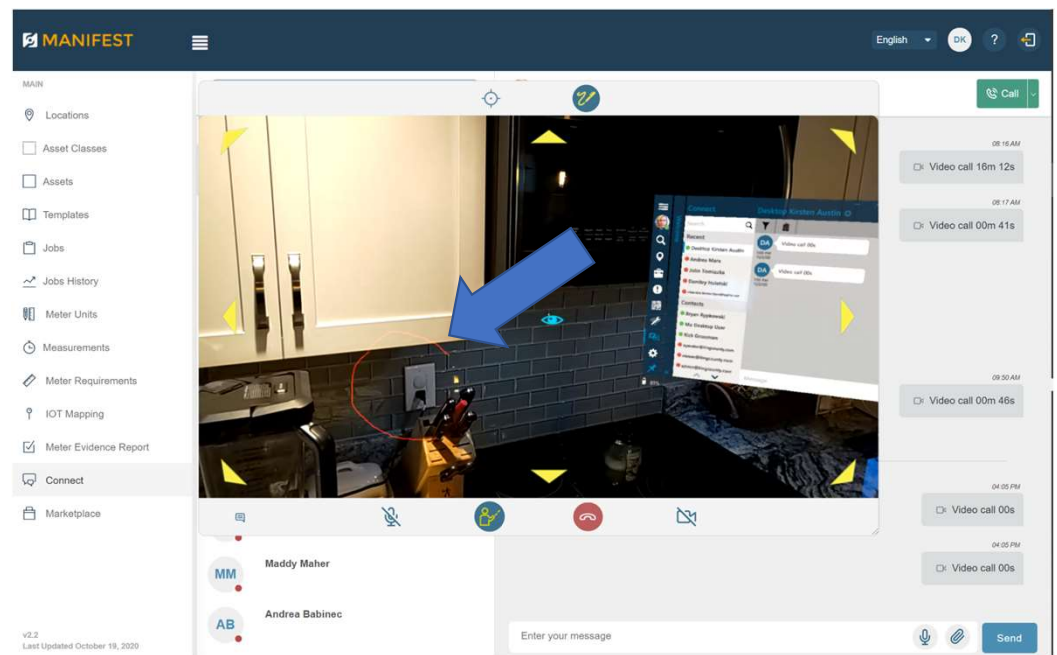
MARKETPLACE

The Marketplace feature is in your unique domain and is a place where a user can import content that might want to be shared with other Manifest customers/partners, etc. or a place to export content and user within one's unique domain.

Features includes:

- Within the Templates listing select "Export to Marketplace" icon and your template and all the associated content will be exported to the Marketplace that is shared with all Manifest domains / users

- Go to the Marketplace and browse the selection of templates. See what you like? Import the template and all the associated content into your unique domain to be used or manipulated for your use case.

- Please Note: Any content exported to Marketplace releases all rights to the content and its associated content.
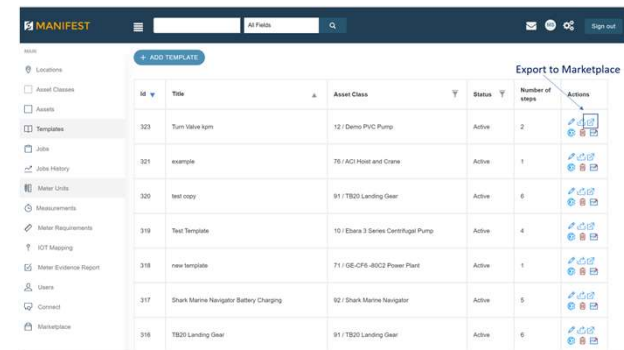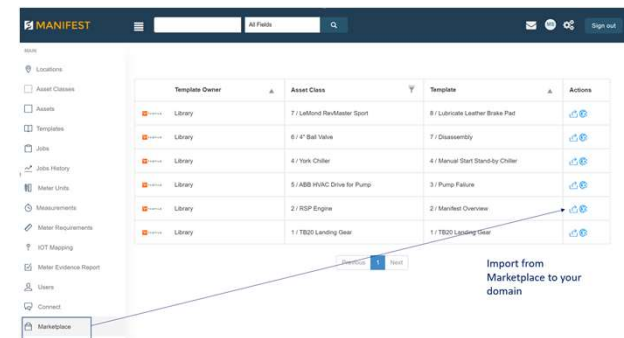
3D MODEL
How to Procure a 3D Model

- There are a variety of ways to obtain a 3D model for your assets. Please work with your Project Manager to discuss your pipeline so we might discuss the best path for your use-case. For reference, we've included possible options below:

  - Use sites like Turbosquid to find 3D models for your project in a vast online catalog of cars, people, textures, Architectual models and more.

  - Contact the Manufacturer to procure available models of equipment

  - Leverage 3D scanners to scan your equipment to generate models. Please Note that you may still require the assistance of a 3D designer to clean up and/or improve upon your results.

  - Have a professional 3D designer hand-model a 3D model for you. Please refer your design resources to the specification guidelines to make sure the model is optimized for use in Manifest

  - Taqtile does offer 3D modeling support. Please ask your Account Manager for more information on utilizing these services

  - Remember that models are not necessary if your primary use-case for Manifest involves work being authored and performed in front of physical objects.

3D MODEL
Model Types Supported

- Accepted model formats include: .obj, .gltf, . Fbx, .dae, .3mf, .3ds, .stl, .glb, .usdz*
- Each 3D model file must be compressed into a single ZIP-archive along with any materials and/or texture files (if applicable) Do not include more than one 3D Model file in each ZIP.
- Zip Files should not exceed 200MB. Please be patient when uploading large files

3D Model Requirements:
- Limit each model to 50,000 vertices or less
- Limit each model to 10 materials or less (each on is a draw call)
- Limit each model to 5 textures, uploading as .png or .jpg 2048 x 2048 or smaller

When exporting a Model, note the following:
- Set Z to forward
- Set Y to Up
- Triangulate Faces
- Model scale 1 unit = 1 Meter
- Set all xyz rotations to 0
- Asset tag will be placed at the origin of the Model

USERS + LOGS

- The Security Admin can add Users to their portal and assign roles
- File by specific roles and see how many total licenses each domain has, how many have been used and how many remain
- Export users to XLS or CSV is needed
- Deactivate a user to add another one temporarily
- Taqtile.com email users DO NOT count towards your license numbers

- The Security Admin has access to domain logs showing all actions of all users
- These logs have the ability to be exported to CSV or XLS
- If records exceed 1000+ log entries requested for download you will be asked to filter your download search

About this Guide

This is a beginners User Guide and Overview of the Manifest Client Web Portal. We will continually be updating and expanding upon this guide so continue to check the download link occasionally for updates.

Last Update: Feburary 23, 2021
Version 2.2

HEADQUARTERS
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