User Guide for mInspections

Connected Worker Solutions

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Copyright and **Terms of Use** page for **Connected Back Office**.

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Preface

Understand audience, know related documents and products and conventions followed in this document.

Intended Audience

This user guide is for plant maintenance field service technicians in your organization. The user guide familiarizes operators or technicians with features and functionality of the Connected Back Office solution.

Document Conventions

Table 0-1 Conventions followed in the document

Convention	Meaning
boldface	Indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Indicates book titles, emphasis, or place-holder variables for which you supply values.
`monospace`	Indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter

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Contents

1. Introduction to mInspections

This chapter provides an overview of the mInspections application for Plant and Asset maintenance, covering topics such as its benefits, new features, enhancements, and system requirements.

This chapter has the following topics:

mInspections Mobile App

mInspections Mobile App guides technicians to inspect assets and fill the inspection data. Technicians inspect the assigned assets using the mInspections Mobile App, detect potential technical failures early on and help prevent equipment breakdowns. These inspection forms ensure the equipment operates effectively and efficiently, reducing downtime, and lowers repair costs.

Using the mInspections Mobile App, Technicians can,

- View and fill the inspections assigned to them.
- Create, view, and update issues when anomalies are found.
- Create, view, and update actions to follow up the issues.

For example, when a form author assigns an inspection to check the motor bearings friction twice a week, the technician visits the functional location or equipment, reviews the check points, captures the data like rpm and voltage, and submits a report using the mInspections application. If any anomalies are found, technicians can raise a notification immediately for the equipment or the functional location. For information, see Author & Assign Forms for Inspections *(on page)*.

mInspections Web Application

mInspections Web Application helps Form Authors or Technical Writers intuitively create forms (standalone or embedded) for checklists, emergency inspections and risk assessments. Technicians can access these digital forms through their mobile devices for equipment data, equipment inspection and pass measurements to the back-end systems.

Using the mInspections Web App, Form Authors/Technical Writers can,

- Create forms for functional location or equipment with multiple questions.
- Schedule inspections and assign them to technicians.
- Monitor progress of inspections execution by technicians.
- Manage issues and follow-ups created by technicians while inspecting assets.

Master Data & User Management Modules

Master Configuration Module helps Administrators to add Plants, Assets, & Functional Locations. Administrators can also add Units of Measurement and Global Response Sets data. For information, see Working with Master Data *(on page 164)*.

Administrators can also add users which include Supervisors and Operators and manage them. For information, see Onboarding Users and Assigning Roles *(on page 197)*.

1.1. Overview of mInspections

mInspections assists form authors in creating forms and supports technicians in executing inspections, recording asset data, and submitting completed inspections. The application includes mobile and web versions, with the mobile app guiding technicians in detecting failures early on to prevent equipment breakdown, while the web app helps form authors create forms and assign them to technicians, ultimately reducing downtime and repair costs.

The mInspections application includes both mobile and web applications.

mInspections Mobile App

The mInspections Mobile App guides technicians to inspect assets and fill the inspection data efficiently, detect potential technical failures early on, and help prevent equipment breakdowns.

For example, when a form author assigns an inspection to check the motor bearings' friction twice a week, the technician visits the functional location or equipment, reviews the checkpoints, captures the data like rpm and voltage, and submits a report using the mInspections application. If any anomalies are found, technicians can raise a notification immediately for the equipment or the functional location. For information, see Author & Assign Forms for Inspections *(on page)*.

mInspections Web Application

The mInspections Web Application helps form authors or technical writers intuitively create forms (standalone or embedded) for checklists, emergency inspections, and risk assessments. These forms help reduce equipment downtime and minimize repair expenses.

Master Data & User Management Modules

The Master Configuration Module empowers administrators to add Plants, Shifts, Assets, Functional Locations, Units of Measurement, and Global Response Set Data. For information, see Working with Master Data *(on page 164)*.

Administrators can also include and oversee users, such as form authors and technicians. For information, see Onboarding Users and Assigning Roles *(on page 197)*.

1.2. Benefits of Using mInspections

mInspections offers following benefits.

Using the mInspections Mobile Application, Technicians can:

- View and execute assigned inspections.
- Carry out maintenance checks and record asset data.
- Create, view, and update issues when anomalies are found.
- Create, view, and update actions to follow up the issues.

For more details, refer to Conduct Inspections *(on page 58)*.

Through the mInspections Web Application, Form Authors/Technical Writers can:

- Create forms with multiple questions for functional location or equipment.
- Schedule inspections and assign them to technicians.
- Monitor progress of inspection execution by technicians.
- Manage issues and follow-ups generated by technicians while inspecting assets.

For more details, refer to Create and Schedule Forms *(on page 93)*.

1.3. New Features and Enhancements

The section lists the new features and enhancements in the mInspections application across releases.

New Features and Enhancements in Release 2408

Table 1-1 New Features and Enhancements in Release 2408

AI-Powered Form Creation Streamline your form creation process with our new Generative AI feature! Design customized forms effortlessly by providing prompts with specific attributes, and let our AI handle the rest. How it benefits: • **Faster Form Creation:** Save time and effort by generating digital forms quickly with AI. • **Easy Customization:** Add specific details to your forms easily, making them more useful. For more information, see Create a Form using Generative AI *(on page 129)*.
Streamlined Issue Creation & Assignment in Web App Form Authors can now quickly Create and Assign Issues to specific technicians directly from the Web App. This streamlined process ensures that inspections are efficiently delegated and tracked to completion, improving accountability and workflow management. How it benefits:

Table 1-1 New Features and Enhancements in Release 2408 (continued)

- **Improved Workflow**: Form Authors can easily create and assign issues, reducing delays in inspection delegation.
- **Enhanced Accountability**: Centralized issue tracking ensures problems are assigned to the right team members and followed through to resolution.

For more information, see Create an Issue *(on page 157)*.

Customizable Language Settings in the mInspections Mobile App

Technicians can now view the mInspections Mobile Application in their Preferred Language. customized to their specific language and regional settings. This enhancement ensures a more intuitive and user-friendly experience, enabling better communication and efficiency in inspections.

How it benefits:

- **Enhanced Accessibility**: Technicians from diverse linguistic backgrounds can easily access and understand the app, improving question comprehension and reducing errors.
- **Increased Efficiency**: By working in their preferred language, technicians can process information faster, leading to quicker responses and better inspections execution.
- **Improved Employee Satisfaction**: A language-inclusive interface boosts technician confidence and engagement, contributing to better performance and morale.

For more information, see Change the Language *(on page 54)*.

Implemented Rapid Sync

Rapid Sync in the mInspections application enhances real-time data synchronization across multiple devices and servers. This ensures that critical information captured during inspections is updated instantly throughout the system, improving accuracy and enabling timely decision-making.

How it benefits:

- **Real-Time Data Availability:** Instantly synchronizes data across all devices, enabling technicians to access the latest information without delays. Facilitates immediate decision-making based on the most current data, improving operational efficiency.

Table 1-1 New Features and Enhancements in Release 2408 (continued)

For more information, see Access Forms in Offline Mode *(on page 54)*.

Enhanced Productivity with Effortless Task Navigation

With the new Seamless Question Navigation feature, technicians can easily move between tasks using **Next** and **Previous** buttons on the on-screen keyboard. This enhancement eliminates the need for manual input, streamlining the inspection process and allowing for quicker, more efficient task management.

How it benefits:

- **Glove-Friendly Operation**: Technicians can easily navigate tasks without removing gloves in challenging work environments.
- **Streamlined Workflow**: Reduces the need to interact with the screen frequently, minimizing interruptions and improving focus.
- **Increased Productivity**: Faster question navigation leads to quicker task completion, enhancing overall operational efficiency.

For more information, see Conduct Inspections *(on page 58)*.

Create Real-Time Breakdown Alerts

With Real-Time Breakdown Alerts, technicians are immediately notified of any equipment breakdowns. This feature ensures instant alerts, enabling quick responses that reduce downtime and keep operations running smoothly and efficiently.

How it benefits:

- **Faster Response Time**: Technicians receive immediate notifications, minimizing delays in addressing issues.
- **Reduced Downtime**: Quick action helps prevent prolonged operational disruptions, keeping productivity high.

For more information, see Create an Issue *(on page 157)*.

Instant Access to Historical Data During Inspections

Table 1-1 New Features and Enhancements in Release 2408 (continued)

Technicians can now view previous readings while responding to a question, with past data displayed directly above the current question. This feature allows for immediate reference and comparison, enhancing accuracy and decision-making during inspections. How it benefits: • **Faster Decision-Making**: Immediate access to past data allows Technicians to make informed decisions on the spot, streamlining workflows. • **Enhanced Data Integrity:** Minimizes the risk of data entry errors, ensuring reliable and consistent information across questions For more information, see Conduct Inspections *(on page 58)*.
Prompt Issue Notifications for Timely Action With Instant Issue Notifications, any created issue is immediately converted into a notification and sent to the relevant technicians. This ensures swift action is taken, improving response times and overall efficiency in handling issues. How it benefits: • **Reduced Response Time**: Technicians receive real-time alerts, enabling them to address issues as soon as they arise. • **Minimized Downtime**: Faster notifications mean quicker issue resolution, keeping operations running smoothly. • **Enhanced Productivity**: Faster notifications mean quicker issue resolution, keeping operations running smoothly. For more information, see Create an Issue *(on page 72)*.

New Features and Enhancements in Release 2404

Table 1-2 New Features and Enhancements in Release 2404

Access and Acknowledge End User License Agreement

Table 1-2 New Features and Enhancements in Release 2404 (continued)

Users are asked to acknowledge the End User License Agreement (EULA) when they log in for the first time. Once they acknowledge it, users are allowed to use the application. Users can access the EULA anytime from the "More" screen in the mobile application. For more information, see Standard Login *(on page 44)*.
Use Formulas for Calculations During Question Execution Configure calculations with formulas for fields while authoring an embedded form. These calculations help technicians enter accurate data, calculate variance, and so on. For more information, see Add Formulas to fields *(on page 108)*.
Add Unit to Number Response Type Add units like kelvin, meter, kg, and so on to the Number response type while authoring Embedded Forms. For more information, see Number *(on page 102)*.
Copy Questions within Forms Copy questions within forms and reduce repetitive work. For more information, see Create and Publish a Form *(on page 123)*.

New Features and Enhancements in Release 2402

Table 1-3 New Features and Enhancements in Release 2402

Add Audio, Video and Documents to Question Responses Add attachments like audio, video and documents to your Question responses and access them as links in the generated PDF for better communication and collaboration. For more information, see Conduct Inspections *(on page 58)*.
View and Download Attachments for Inspections

Table 1-3 New Features and Enhancements in Release 2402 (continued)

View and download attachments like audio, video and documents by clicking the links in the generated inspection details PDF to validate the evidence. effectively For more information, see View Forms and Form Details *(on page 154)*.
Master Data Management Integration Create and update master data directly within the Connected Worker's platform by utilizing files stored in an FTP server. For more information, see Integration Guide.

New Features and Enhancements in Release 2401

Table 1-4 New Features and Enhancements in Release 2401

Use Formulas for Calculations During Question Execution Execute questions accurately using formulas. These formulas are configured using the web application and give accurate calculations and help technicians enter accurate data. For more information, see Conduct Inspections *(on page 58)*.
Assign Actions to User Groups Create and assign actions to user groups in mobile application. This allows any technician in those groups to pick up and execute those actions. For more information, see Create an Action *(on page 80)*.
Sync Last N Task Reading in Online and Offline mode Sync "Last N Task Reading" in online mode and download them offline during initial sync by enabling the toggle button accessible in the User Preference screen. For more information, see Select or Change a Plant *(on page 51)*.
Acknowledge End User License Agreement

Table 1-4 New Features and Enhancements in Release 2401 (continued)

Read and acknowledge End User License Agreement when logged into the application for the first time. For more information, see Standard Login *(on page 44)*.
Configure Mathematical Formulas for Fields Configure mathematical formulas for fields. These formulas help technicians get accurate calculations and enter accurate data. For more information, see Number *(on page 102)*.
Deactivate Unnecessary Master Data Deactivate Assets and Locations that are no longer needed. For more information, see Deactivate Location Master Data *(on page 172)*.
Create and Assign Actions to User Groups Create and assign actions to user groups in the web application. This allows any technician in those groups to pick up and execute those action. For more information, see Create an Action *(on page 158)*.
SAP IAS Authentication Integration mInspections application now seamlessly supports SAP IAS for enhanced user authentication. For more information, see Login with SAP IDP *(on page 92)*.
Configure Priorities for Issues and Actions at Tenant Level Set Priority dropdowns with color codes for Issues and Actions at the Tenant Level. For more information, see Create Tenant/Super Admin role *(on page 189)*.

New Features and Enhancements in Release 2312

Table 1-5 New Features and Enhancements in Release 2312

Prevent accidental inspections submission with prompts Receive confirmation prompts when submitting inspections, and prevent accidental submissions of inspections. For more information, see Conduct Inspections *(on page 58)*.
View Character Limits for Fields View character limits for each field, enter the right data, and maintain data integrity. For more information, see Conduct Inspections *(on page 58)*.
Justify Overdue Inspections When an inspection goes beyond the due date, specify reasons for the overdue in the comment. For more information, see Overview of the Mobile Application *(on page 37)*.
Record Question-Level Date & Timestamp Move between questions during inspection execution by marking / recording the date and time for each question individually. For more information, see Conduct Inspections *(on page 58)*.
Receive Instant Email Alerts • Receive instant emails when the inspection is assigned so that you can get started on the inspection based on priority of the question. • Receive instant emails when an issue or action is created, updated, resolved or closed. For more information, see Create and Manage Issues and Actions *(on page 155)*.

Table 1-5 New Features and Enhancements in Release 2312 (continued)

Specify Length of data to be entered in the fields Set specific field lengths while authoring forms. This helps prevent incorrect or incomplete data entry during inspection execution. For more information, see Pointers for creating an effective form *(on page 94)*.
Download User List for a Plant Download the user list from the User Management module and view their assigned roles. For more information, see Add Users and Assign Roles *(on page 200)*.
Create and Schedule Ad-Hoc Inspections Create ad-hoc inspections to address emergencies or any unforeseen situations. For more information, see Create Ad-Hoc Forms *(on page 151)*.

New Features and Enhancements in Release 2311

Table 1-6 New Features and Enhancements in Release 2311

Add Videos and Documents to Question Responses Add attachments like videos and documents to your Question responses and access them as links in the generated PDF for better communication and collaboration. For more information, see Conduct Inspections *(on page 58)*.
View and Download Attachments for Inspections View and download attachments like videos and documents by clicking the links in the generated inspection details PDF, and validate the evidence. For more information, see View Forms and Form Details *(on page 154)*.

New Features and Enhancements in Release 2309 SP03

Table 1-7 New Features and Enhancements in Release 2309 SP03

View historical data of Issues of an Asset and a Location • Receive pop-up message while creating an issue for assets / locations that shows existing issues and lets you create new ones. • View the issue history or previously raised issues to avoid creating duplicates. • Create an issue at any time, regardless of previous issues raised. • View all past issues, even after new ones are raised. For more information, see Conduct Inspections *(on page 58)*.
View historical data of Notifications of an Asset and a Location • Receive pop-up message while creating an issue for assets / locations that shows existing issues and lets you create new ones. • View the issue history or previously raised notifications to avoid creating duplicates. • Create a notification at any time, regardless of previous notifications raised. • View all past notifications, even after new ones are raised. For more information, see Create ERP Notification against an asset *(on page 159)*.
Access Plant-Specific Inspections Assign plants to users and ensure secure control over the inspections. For more information, see Overview of the Web Application *(on page 87)*.
Create Master Data with Unique ID and avoid duplication • Create master data such as plants, assets, and locations with a unique id and avoid duplication. • Manually enter ids when copying to prevent duplicates in assets, locations, and plants. • Receive error messages for duplicate IDs and records while bulk uploading master data.

Table 1-7 New Features and Enhancements in Release 2309 SP03 (continued)

For more information, see Working with Master Data *(on page 164)*.
Improved Global Response Management Auto-update responses for all associated forms when global responses are updated, prevent accidental deletions, and integrate updated data with SAP for improved consistency and security. For more information, see Modify Global Response Set Data *(on page 186)*.

New Features and Enhancements in Release 2309 SP02

Table 1-8 New Features and Enhancements in Release 2309 SP02

Auto-Capture Geolocation during Inspection Execution During inspection execution in offline mode, auto-capture geolocation of the asset. For more information, see Conduct Inspections *(on page 58)*.
Sort Global Response Set by Ascending to Descending Order Create a Global Response Set by sorting the Global Pick List in both ascending order ("A to Z") and descending order ("Z to A"). For more information, see Create Global Response Set data *(on page 184)*.

New Features and Enhancements in Release 2309 SP01

Table 1-9 New Features and Enhancements in Release 2309 SP01

Sync inspections data for a plant Select a specific plant to sync data and filter out non-relevant data. For more information, see Select or Change a Plant *(on page 51)*.
Access only user group specific inspections

Table 1-9 New Features and Enhancements in Release 2309 SP01 (continued)

Access user group specific inspections for a tailored user experience. For more information, see Overview of the Mobile Application *(on page 37)*.
Capture detailed inspection data with additional data provided by the forms author View additional notes, labels, values in the Task Details screen that are provided by the forms author and capture detailed and valuable information. For more information, see How to conduct Inspections *(on page)*.
Attach videos and documents as proofs for questions Attach videos and documents as responses and improve comprehension of the question data, with clickable links in generated PDF reports for enhanced usability and documentation. For more information, see How to conduct Inspections *(on page)*.
Toggle themes for personalized experience Switch between Dark Mode and Light Mode themes depending on your preferences. For more information, see Switch between Dark mode and Light mode *(on page 52)*.
Introduced User Groups • Create a user group and add users to the group. • Modify the user list in the user group. • Remove a user from the user group. • Copy an existing user group to quickly create new user groups. • Delete a user group and assign inspections to another group. For more information, see Create User Groups and Add Users *(on page 204)*.
Schedule inspections based on question frequency for efficient maintenance

Table 1-9 New Features and Enhancements in Release 2309 SP01 (continued)

Schedule Inspections based on individual question frequencies. Form a comprehensive Master Plan for proactive asset maintenance and ensure precise, efficient equipment maintenance. For more information, see Schedule Inspections at Question Level *(on page 150)*.
Assign users to multiple plants Assign users to multiple plants. Users can access plant specific data and execute maintenance for assets in the plant. For more information, see Add Users and Assign Roles *(on page 200)*.
Assign inspections to user groups Assign inspections to user groups when scheduling. Any user from the group will be able to pick up the inspection and execute maintenance. For more information, see Schedule and Assign Form *(on page 144)*.
Enable unlimited historical data capture for Number response type Enable / configure the Number response type to store up to 20 historical readings that help detect anomalies early using the data trends. For more information, see Number *(on page 102)*.
Add additional details for conditional logic Add mandate responses, define a number range, and specify unit of measurement options for questions in conditional logic. For more information, see Conditional Logic *(on page 120)*.
Add additional notes, labels, values in the Questions Details screen Add additional notes, labels, values in the Questions Details screen to provide additional information to technicians and assist them to function more efficiently and effectively.

Table 1-9 New Features and Enhancements in Release 2309 SP01 (continued)

For more information, see Create and Publish a Form *(on page 123)*.
Search templates based on meta tags Search templates based on meta tags to import questions and boost efficiency. For more information, see Create and Publish a Form *(on page 123)*.
Access Additional Details/ Tags in forms/templates in dashboard screen Access additional details/ tags in the forms / templates as columns on the dashboard, and seamless search for details based on meta tags. For more information, seeCreate Inspection Forms from Templates *(on page 138)* .
Fuzzy search to search for template in the Template list and Import Questions screens Fuzzy search to search for templates in the Template list and Import Questions screens to enhance usability and swiftly locate templates and questions. For more information, see Create and Publish a Form *(on page 123)*.
Access Additional Details/Tags in the Forms List Access Additional Details/Tags as columns in the Forms List. For more information, see Create and Publish a Form *(on page 123)*.

New Features and Enhancements in Release 2308

Table 1-10 New Features and Enhancements in Release 2308

Get Timely Reminders about Every Issue, Action and Inspection Receive push notifications from the application to ensure you don't miss important re-minders such as overdue inspections, issues, or actions. For more information, see How to view Local Notifications *(on page)*.

Table 1-10 New Features and Enhancements in Release 2308 (continued)

Conduct Inspections effortlessly with access to notes and manuals even when offline Access any notes and manuals associated with inspections even in offline mode to perform the inspections according to the Standard Operating Procedures to enhance efficiency and productivity. For more information, see Conduct Inspections *(on page 58)*.
Option to skip Inspections when not required Skip the inspections with an appropriate reason when the inspection is no longer required. For more information, see Conduct Inspections *(on page 58)*.
Explore Dashboards with interactive graphs and get real-time insights at a glance • A dynamic pie chart displays inspections that are due today with Overdue, Assigned, In-Progress, Submitted, and Skipped statuses. • Tap the Assigned, In Progress, Submitted, Overdue, and Skipped legends to view the assigned, in progress, submitted, overdue, and skipped inspections. • Tap the widgets that display the count of Issues and Actions assigned to the operator to facilitate navigation to the respective screens. • Tap the Open Issues/Actions to see the list of open issues or actions from the dashboard. For more information, see Overview of the Mobile Application *(on page 37)*.
Section-wise question counts for easy progress tracking View the count of questions on individual sections in a page for each inspection to clearly understand the question distribution and progress within the asset in the mobile application. For more information, see Conduct Inspections *(on page 58)*.
Switch Users Seamlessly from the lock screen

Table 1-10 New Features and Enhancements in Release 2308 (continued)

You can handover your device to another user when the shift ends so that the other user can use the same device using their credentials. For more information, see Login as a different user *(on page 48)*.
Import sections and questions from a template • Create an Inspection Template with one page and multiple sections and questions. • Edit the template sections and questions. The changes automatically get reflected in all the forms that use the template. • Copy an existing template to quickly create new templates. • Archive templates that are no longer required, or you can permanently delete them. • Restore the archived templates when required. For more information, see Create Inspection Forms from Templates *(on page 138)*.
Rapid form generation and customization • Import sections and questions from templates to quickly create new forms. • Unlink a section from the template to modify questions. For more information, see Import Questions from Template *(on page 141)*.
Upload forms in Bulk Seamlessly • Save time on form creation with the bulk upload form feature. • Download the bulk upload Excel template, add information, and upload it to create forms at once. For more information, see Bulk Upload Forms *(on page 136)*.
Author forms with flexible design options Choose to create either Standalone forms for the mInspections mobile application or Embedded forms for the mWorkOrder application from the Create Forms screen. For more information, see Create and Publish a Form *(on page 123)*.

Table 1-10 New Features and Enhancements in Release 2308 (continued)

Real-Time adaptation with the Skipped status in Inspections You can view the Skipped status, which indicates that an entire inspection was skipped with a reason. For more information, see Conduct Inspections *(on page 58)*.
Add Notes and Attachments to work on inspections effortlessly Add additional notes, safety instructions, and manuals as PDFs or images in the Form Details screen to provide additional information to function more efficiently and effectively. For more information, see Create and Publish a Form *(on page 123)*.

New Features and Enhancements in Release 2306

Table 1-11 New Features and Enhancements in Release 2306

Introduced Dashboard • Dynamic pie chart displays inspections that are due today with Assigned, In-Progress, and Submitted statuses. • Click Assigned and In Progress legends to view the My Inspections screen. • Click cards that display the count of Issues and Actions assigned to the technician to facilitate navigation to the respective screens. • Add Issues and actions from Open Issues/Actions from the dashboard. For more information, see Overview of the Mobile Application *(on page 37)*.
View numeric historical data • View the history of numeric fields as a line chart for Number and Slider response types. • View the question name, technicians who took the last 5 readings, and dates of the readings.

Table 1-11 New Features and Enhancements in Release 2306 (continued)

For more information, see Conduct Inspections *(on page 58)*.
Enhanced PDF Preview Setup • Highlighted important fields such as Description, Asset, Location, and Priority of Issues & Actions. • Enriched PDF Preview with Photo & PDF attachments alongside textual content. • Incorporate visual cues for skipped Tasks, Assets, Locations and barcodes with reason codes. For more information, see Configure Round Plan Details PDF *(on page 132)*.
Overdue status in Inspections • Overdue status indicates that an inspection has not been submitted before the due date. • The application hides Overdue and Submitted inspections one day after their due date. For more information, see Conduct Inspections *(on page 58)*.
Enhanced Inspection Details • Add additional fields, labels with up to 25 and values with up to 40 characters, at the Inspection Header screen to provide specific information based on the situation. • Flexibility to update or delete the added field labels and values at any time, even after scheduling Inspections. • Set labels and values as read-only to ensure consistency and prevent unintended modifications. For more information, see Create and Publish a Form *(on page 123)*.
Enhanced Number Response Type Enter decimals and negative values as responses to questions that have a number response type.

Table 1-11 New Features and Enhancements in Release 2306 (continued)

For more information, see Conduct Inspections *(on page 58)*.
View Start and Due Date/Time and start inspection • View Inspection details with Shift, Start date, Due Date, and Time slot in the Header. • Start inspections only after the designated Start Date/Time. • Overdue inspections automatically disappear from the mobile app after 24 hours. For more information, see Conduct Inspections *(on page 58)*.
Publish forms to mWorkOrder • Create embedded forms and publish them to the mWorkOrder application. • Seamless integration with mWorkOrder application for technicians to fill out forms during work execution. For more information, see Create and Publish a Form *(on page 123)*.
Assign inspections to plants based on shifts • Display Inspections with Shift, Start date, Due Date, and Time slot in the mobile app. • Create shifts and Assign to Plant Operations. • Schedule inspections by shifts and split slots for improved flexibility and optimized work execution. For more information, see Schedule and Assign Form *(on page 144)*.
Setup Timezone at Plant Level • Assign country codes to plant masters. • Enable time zone selection based on the plant's country. For more information, see Create Plant Master Data *(on page 164)*.
Embrace Control Over Inspections

Table 1-11 New Features and Enhancements in Release 2306 (continued)

• View/modify Shift, Start Date & time, Due Date & time, and Assignee for each inspection. • Add a notification message whenever the Shift, Date, or time is changed. For more information, see Create and Publish a Form *(on page 123)*.
Enhanced PDF Preview Setup Download PDFs of Overdue inspections if they were earlier in the In Progress state.
Configure Numeric Response Type Enable the "History" checkbox to view the last 5 readings of the Number and Slider response types in the mobile app. For more information, see Create and Publish a Form *(on page 123)*.

New Features and Enhancements in Release 2305

Table 1-12 New Features and Enhancements in Release 2305

Conduct Inspections • Skip non-mandatory questions from the inspection questions by selecting a reason. For more information, see Conduct Inspections *(on page 58)*.

New Features and Enhancements in Release 2304

Table 1-13 New Features and Enhancements in Release 2304

View, Assign, and Execute Forms

Table 1-13 New Features and Enhancements in Release 2304 (continued)

• View the list of inspections in Open Inspections. • Self-Assign inspections from Open Inspections. • View assigned inspections in My Inspections. • Unassign To-Do, In Progress forms. • Create AD HOC inspections from unscheduled forms, add them to My Inspections and execute them. • Execute the assigned inspections, answer questions in the form and submit them. For more information, see Conduct Inspections *(on page 58)*.
Create, View, Assign, and Close Issues • Create issues for the observed anomalies during inspections. • View the list of issues in Open Issues and self assign if needed • View created and assigned actions in My Issues. • Engage in live conversations with assigned Users. • Create a Notification for an asset and sync it with backend ERP systems instantly. For more information, see Create and Manage Issues *(on page 71)*.
Create, View, Assign, and Close Actions • Create actions to follow-up on issues. • View the list of actions in Open Actions. • Self-Assign actions from Open Actions. • View created and assigned actions in My Actions. • Work on the assigned actions and close them. For more information, see Create and Manage Actions *(on page 79)*.
Productivity Enhancements • View Question Progress Bar in inspections to track questions progress. • Add notes and attachments or media such as images as additional information or evidence.

Table 1-13 New Features and Enhancements in Release 2304 (continued)

For more information, see Conduct Inspections *(on page 58)*.
Access forms even when there is no network connectivity • Automatically download data from servers onto the devices on login. • Access the data in the offline mode. • View, Assign, and Execute Inspections. • Create, View, Assign, and Close Issues. • Create, View, Assign, and Close Actions. • Automatically download updates and syncs changes to the server when online. For more information, see Access Forms in Offline Mode *(on page 54)*.
Create, View, Edit, and Publish Forms • Create a form with multiple pages, sections, and questions. • Preview the form in the mInspections mobile application. • Configure the PDF view of the submitted forms with Header, Subject, Footer, and Body. • View list of created forms, edit them if required, and view form meta details. • Edit a form to meet new requirements. For more information, see Create and Publish a Form *(on page 123)*.
Add Response Types and Conditional Logic to Forms Read Only Field, Text answer, Long Text Answer, Number, Number Range, Number with Unit of Measurement, Pop up message based on number range, Check box, Scan (with OCR), Date & Time, Date Range, Signature, Slider, Geo Location, Multi-choice and, Global Picklist with multi selection, Hyperlink, Instructions, Conditional Logic response types can be added to tasks. For more information, see Pointers for creating an effective form *(on page 94)*.
Schedule Form • Schedule form by frequency, by data and assign them to technicians. • View list of published & scheduled forms and modify schedules as required.

Table 1-13 New Features and Enhancements in Release 2304 (continued)

For more information, see Schedule and Assign Form *(on page 144)*.
Track progress of Scheduled Forms • View Open, To-Do, In-progress, and Submitted forms. • Download PDF reports of in-progress and Submitted forms. For more information, see View Status of Forms *(on page 153)*.
Archive, Restore or Delete Form • Archive authored forms which are no longer required. • Restore the form when required. • Permanently delete the form. For more information, see Archive, Restore, and Delete Forms *(on page 161)*.
Track progress of Open Issues and Actions • View charts of open issues and actions. • View list of Open issues and actions created by technicians. • Create a Notification for an asset and sync it with backend ERP systems instantly. For more information, see Create and Manage Issues and Actions *(on page 155)*.
Search & Filter • Search and Filter forms. • Search and Filter archived forms. • Search and Filter templates. For more information, see Search Inspections, Issues, and Actions *(on page 55)*.
Productivity Enhancements

Table 1-13 New Features and Enhancements in Release 2304 (continued)

• Create a new form quickly by importing the questions from an existing form. • Copy an existing form and create a new form quickly. • Save forms as templates. • Create new forms from templates. For more information, see Create Inspection Forms from Templates *(on page 138)*.
Add, Search, View, and Edit Plants Data • Add, edit / modify plants' data. • Search plants and view details. For more information, see Create Plant Master Data *(on page 164)*.
Add, Search, View, and Edit Asset Data • Add, edit / modify assets data. • Search assets and view details. • Bulk upload assets data through excel files. For more information, see Create Asset Master data *(on page 172)*.
Add, Search, View, and Edit Location Data • Add, edit / modify locations' data for assets. • Search locations and view details. • Bulk upload locations data through excel files. For more information, see Create Location Master data *(on page 168)*.
Add, Search, View, and Edit Unit of Measurement (UOM) Data • Add, edit / modify units of measurement. • Search the list of UOMs and view details. • Bulk upload UOM through excel files.

Table 1-13 New Features and Enhancements in Release 2304 (continued)

For more information, see Create Unit of Measurement Master data *(on page 177)*.
Add, Search, View, and Edit Global Response Set Data • Add, edit / modify Global Response Set data. • Search Global Response Set data and view details. • Bulk upload Global Response Set data through excel files. For more information, see Create Global Response Set data *(on page 184)*.
Onboard New Customers • Onboard customers as a tenant/super admin. • View and edit the tenant details such as primary, ERP, protected resources, database configuration, collaboration, configuration, and assets. • Provide access to modules in the CBO application. • Add a customer logo in the application for tenant users to identify the instance of the connected worker platform. For information, Onboarding Tenants/Super Admins *(on page 189)*.
Onboard Users • Create roles and assign permissions to the modules in the application. • Create users and assign roles. Provide access to the right modules to execute their tasks. • View and edit user details and deactivate users who are no longer required. For information, Add Users and Assign Roles *(on page 200)*.

1.4. System Requirements

The application requires the following minimum system requirements for optimal performance.

System	Minimum Requirement
Compatible OS Platform and Version(s)	64-bit Windows and Macintosh
Compatible Form Factors	Desktop iOS - Tablets and Phones Android - Tablets and Phones
Compatible Device(s)	iOS 16 (and above), iPad Air (2 and above), iPad (5th gen and above), and iPad Mini (4 and above) All iPad Pro models iPhone 10 and above and iPhone SE2 Android 12 Samsung, Google, One Plus, ECom and iSafe devices that support Android 12 and above
Compatible Browser(s)	Chrome (Best view), Firefox, and Microsoft Edge
Device Storage and Memory Requirements	**Windows** 8GB RAM and a 64-bit operating system with an x64-based processor are preferred **Macintosh** 8GB RAM & 64-bit operating system **Mobile** Android: 6GB RAM and above iOS: 4GB RAM and above

2. Conducting Inspections using the Mobile App

The chapter discusses the mInspections mobile application, outlining its features which include conducting inspections, creating ad-hoc inspections, and managing issues and actions.

This chapter has the following topics:

2.1. Overview of the Mobile Application

The mInspections mobile application consists of modules like Home, Inspections, Actions, and Issues, which help field technicians efficiently manage tasks, prioritize work, and track maintenance activities. The app allows technicians to view, assign, and update inspections, actions, and issues, ensuring timely resolution and effective communication within the team.

Home

The home tab of the mInspections mobile application helps you with the following:

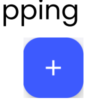
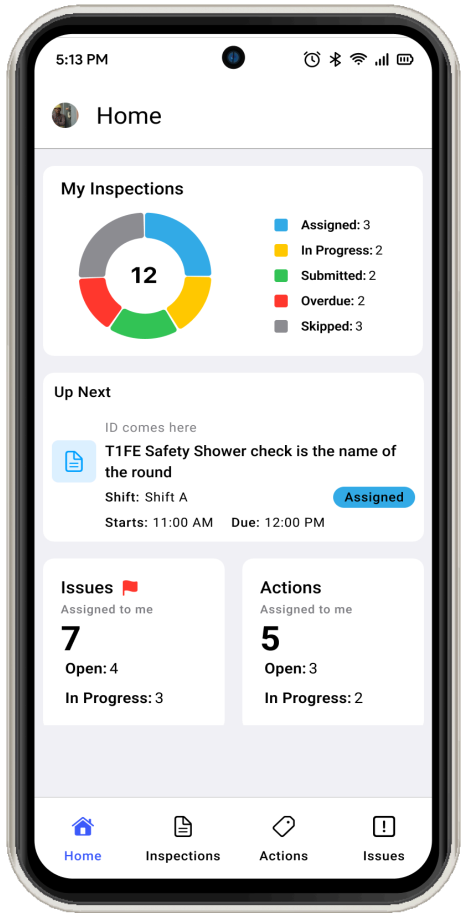
- View the inspections assigned to you and due for the day. These inspections are categorized as Overdue, Assigned, In-progress, Submitted, and Skipped statuses.
- View the number of Issues and Actions assigned to you.
- Create an issue, action, or shift log by tapping the  button at the bottom of the screen.

Figure 2-1 mInspections Home Screen

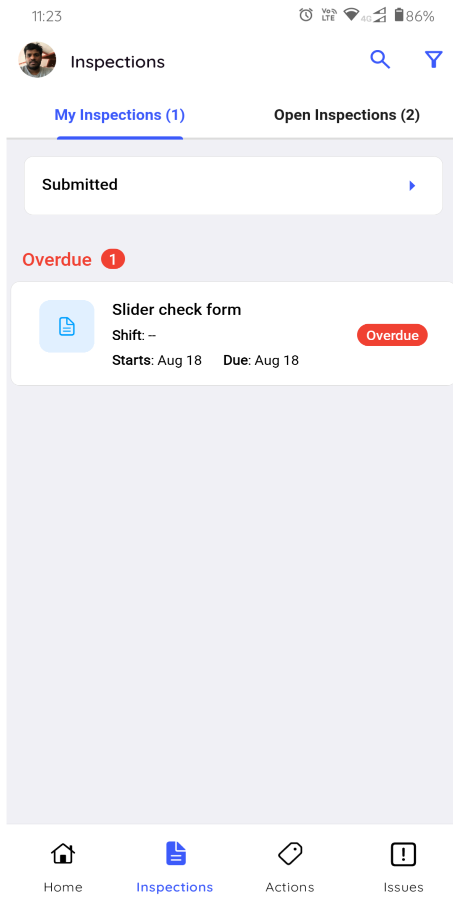


Inspections

The Inspections tab consists of two sub-tabs: My Inspections and Open Inspections.

My Inspections: This sub-tab displays forms assigned to you (the logged-in user). The inspections are grouped based on Start or Due Date & Time. You can search for inspections using the Search bar and filter them by Due Date and Status. Tap on Submitted Inspections and Skipped Inspections to see the lists of submitted and skipped inspections.

Figure 2-2 My Inspections

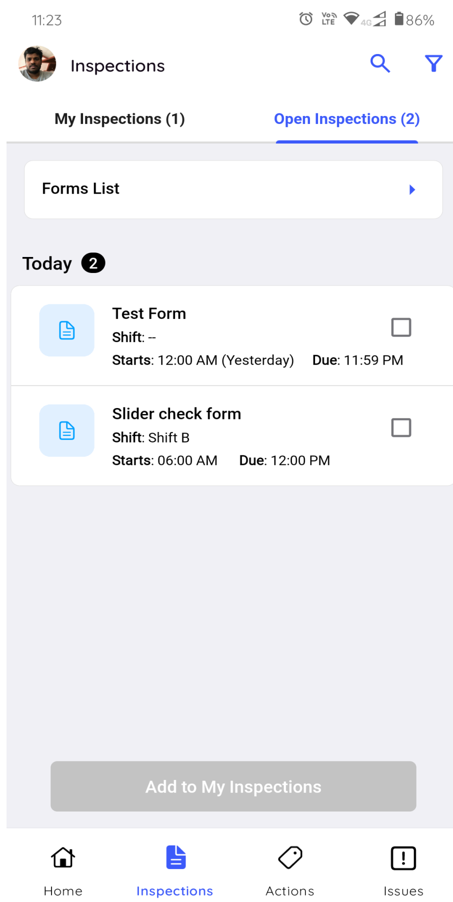


Note:

- Inspections that are overdue, skipped, or submitted are automatically excluded from the list after 24 hours.
- You can provide a reason for an overdue inspection by opening the inspection, tapping the More ••• icon on the top right, and tapping **Overdue Reason**, and selecting a reason.
- If your form authors have provided a buffer time for an inspection while scheduling it, you can still complete the inspection after the due time and submit it. For more details, see Schedule Forms by Frequency and Assign *(on page 144)*.

Open Inspections: This sub-tab displays forms that are not assigned to any technician. You can select and assign an inspection to yourself. You can also search for inspections using the Search bar and filter them by Due Date, Created By and Inspections (with or without User Group). Tap Forms List to view and generate Ad-Hoc inspections.

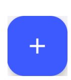
Figure 2-3 Open Inspections



Actions

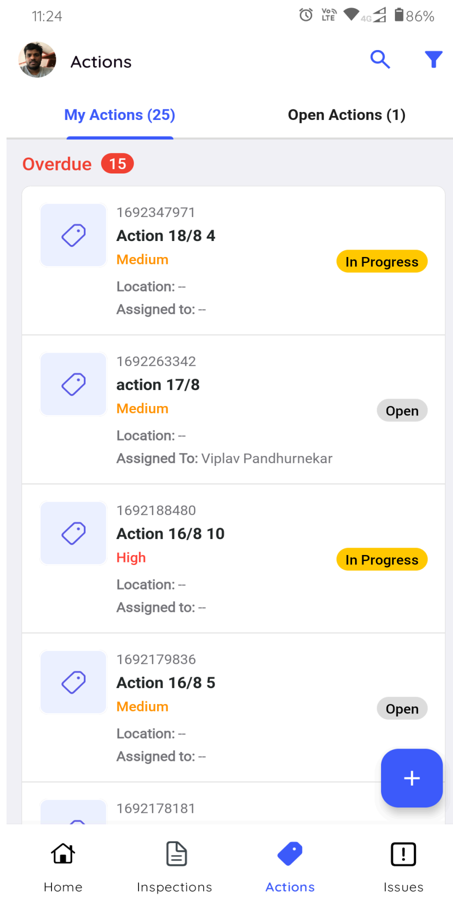
Actions are follow-up tasks to inspections that are assigned to technicians by Form Authors. This tab consists of two sub-tabs: My Actions and Open Actions.

My Actions: This sub-tab displays actions that you have created or that are assigned to you (the logged-in user). You can search for actions using the Search bar and filter them by Due Date, Priority, Status, **Plant**, Location, Asset, Assigned to, Show actions assigned to me, Show actions created by me, & Hide Resolved. You can also create a new action using the

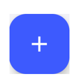


icon in the My Actions tab.

Figure 2-4 My Actions

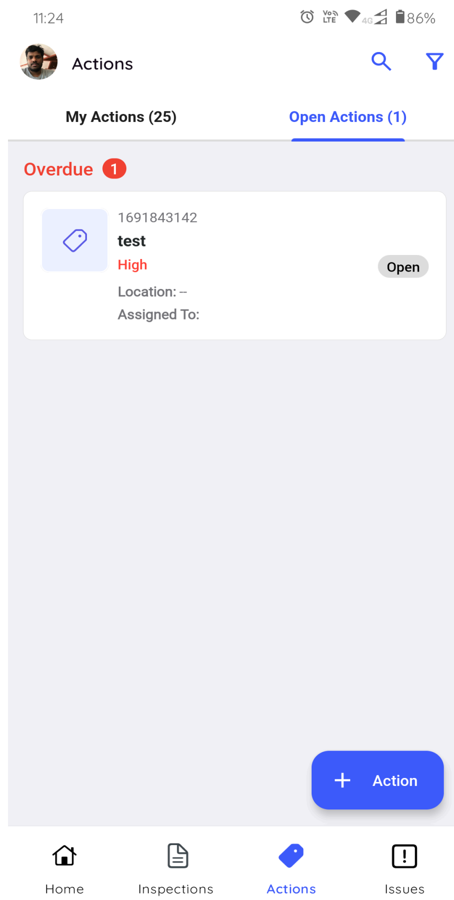


Open Actions: This sub-tab displays actions that are created but not assigned technicians. You can search for actions using the Search bar and filter them by Due Date, Priority, Status, Plant, Location, Asset, Assigned to, Show actions created by me, & Hide Resolved. You can also create a new action using the



icon in the Open Actions tab.

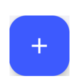
Figure 2-5 Open Actions



Issues

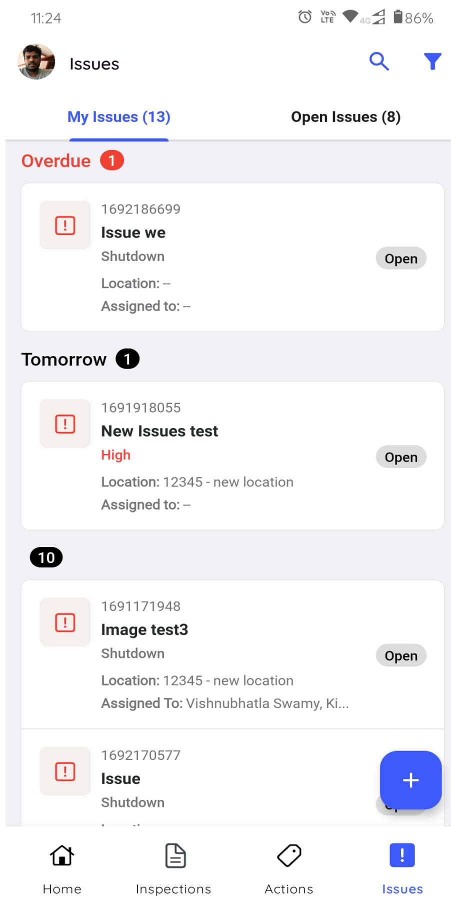
Issue is created when an issue or anomaly is found during maintenance inspections. The issue is then assigned to technicians by supervisors. As a field technician, you can update the log history to provide information about the issue. The Issue tab consists of two sub-tabs:

My Issues: This sub tab displays issues created by or assigned to the logged-in technician. You can search for issues using the Search bar and filter them by Due Date, Category, Priority, Status, Plant, Location, Asset, Assigned to, Show issues assigned to me, Show issues created by me, & Hide Resolved. You can also create a new issue using the



icon in the My Issues tab.

Figure 2-6 My Issues



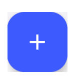
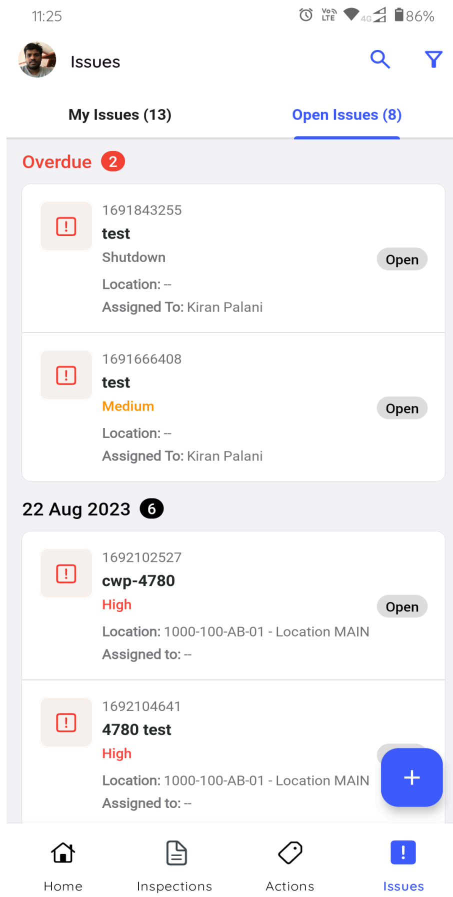
Open Issues: This sub-tab displays issues created by other technicians. You can search for issues using the Search bar and filter them by Due Date, Category, Priority, Plant, Location, Asset, and Created by. You can also create a new issue using the  icon in the Open Issues tab.

Figure 2-7 Open Issues



2.1.1. Log into the Mobile Application

This section provides guidance on logging into the mInspections mobile application, including configuring a passcode and enabling Touch ID & Face ID.

This topic has the following sub-topics:

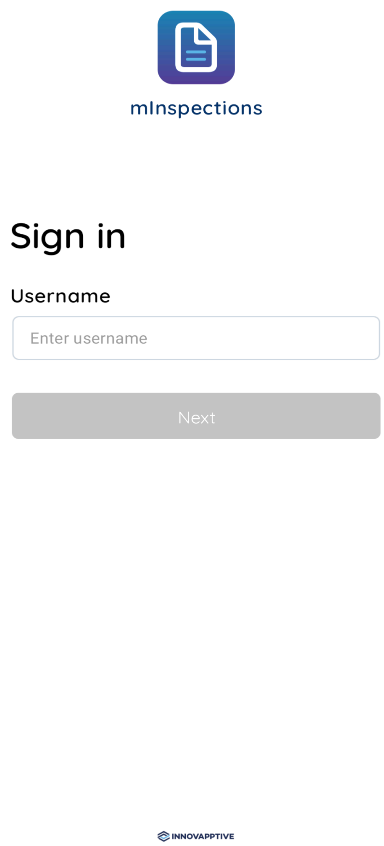
2.1.1.1. Standard Login

This section provides instructions on logging into the mInspections application and setting up passcode, touch ID, and face ID for added security.

To login using Username and Password:

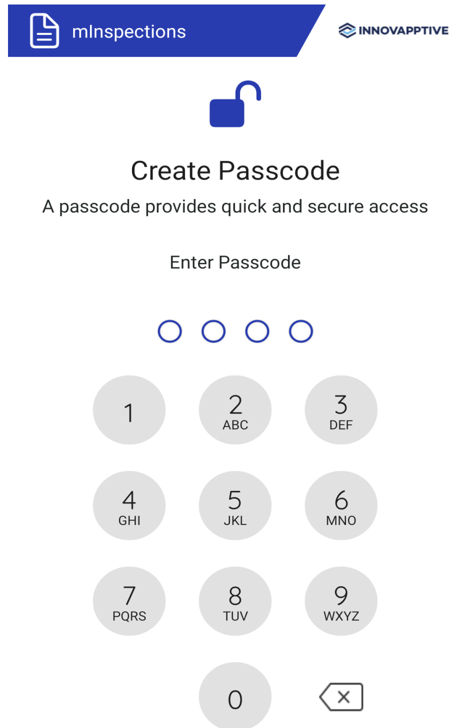
1. Open the mInspections application.
2. In the **Welcome** screen, enter your company or **domain**.
3. Tap **Next**.
4. In the **Sign In** screen, enter your **Username**.

Figure 2-8 Enter Username



5. Tap **Terms and Conditions** to read End-User License Agreement (EULA) of Service.
6. Tap **Next**.
7. In the **Password** screen, enter **Password**.
8. Tap **Sign In**.

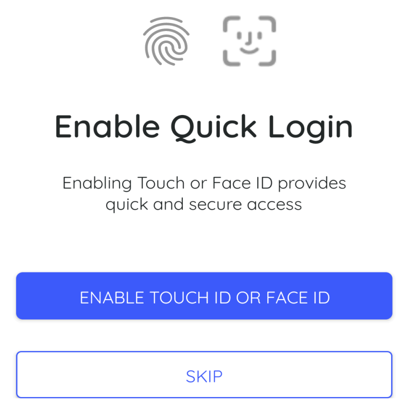
Figure 2-9 Create Passcode



9. Create and confirm app passcode in the **Create Passcode** and **Confirm Passcode** screens.

> **Note:**
> To disable password configuration, please contact the Innovapptive tenant management team.

Figure 2-10 Enable Touch ID or Face ID



10. In the **Enable Quick Login** screen, enable Face or Fingerprint identification for login access by tapping **Enable Touch ID or Face ID**.
11. In the **User Preferences** screen, select **Plant**, **Unit**, **Position**, **Shift**, and **Sync Task Reading History**. For more information, see Select or Change a Plant *(on page 51)*.
12. Tap **Save**.

    The application syncs the data based on the selected preferences and displays the Home screen. For more information, see Access Forms in Offline Mode *(on page 54)*.

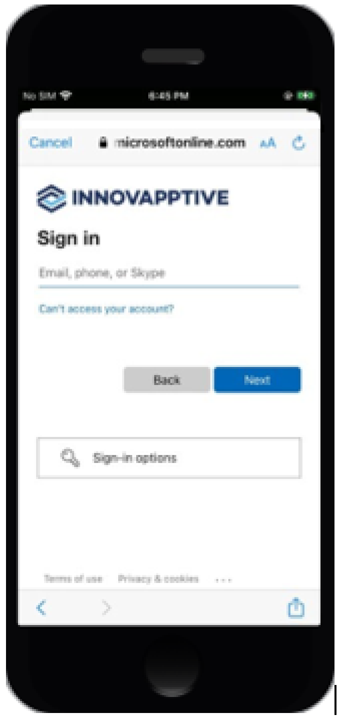
2.1.1.2. Login with Azure IDP

You can log into the mobile application using SAP IDP. The login process involves entering company details, email, password, and creating a passcode.

To login using Azure IDP:

1. Open the mInspections application.
2. In the **Sign In** screen, enter your registered Email, Phone or Skype ID, and click **Next**.
3. Enter the password and tap **Sign In**.

Figure 2-11 Azure IPD Sign in Screen



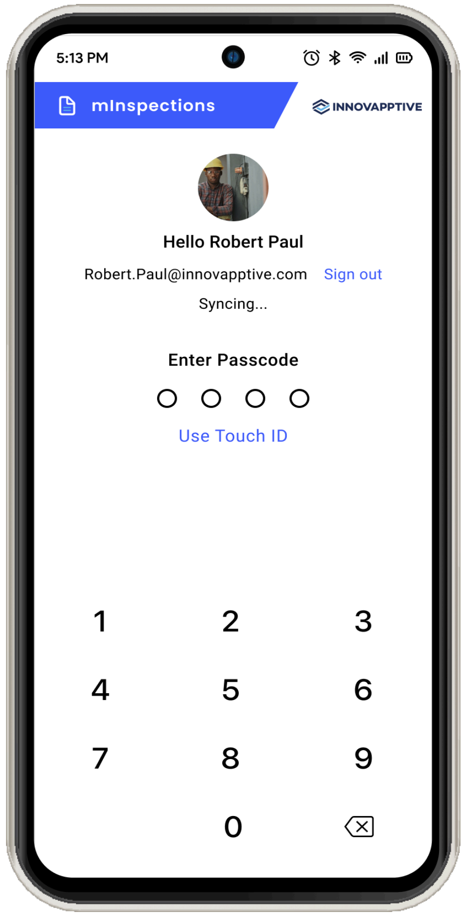
2.1.1.3. Login as a different user

You can hand over your device to another user at the end of your shift, so they can use it with their credentials.

To login as a different user:

1. In the App Passcode screen, tap **Sign out**.

Figure 2-12 Login as a different user



2. In the **Sign in as a Different User** pop-up, tap **Continue**.
   The previous user is logged out and you can login with your credentials.

2.1.2. View User Profile

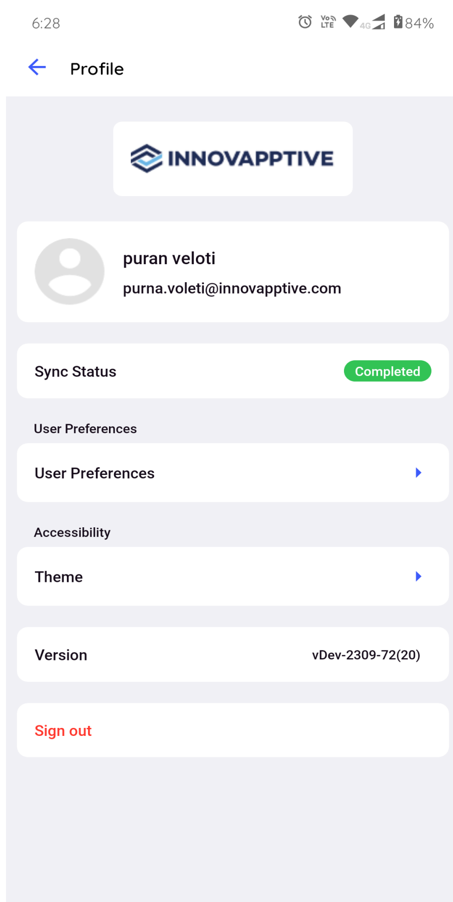
User Profile displays information about the logged-in user and their configured app settings. Any changes made by the admin are reflected in the User Profile screen.

To access the User Profile screen,

1. Login to the application.
2. Click the User Profile icon on top left.

   The User Profile screen is displayed with the following details:
    - Photo
    - Full Name
    - Email ID
    - Sync Status
    - User Preferences
    - Theme
    - Version
    - Sign Out

   Figure 2-13 User Profile Screen



2.1.2.1. Select or Change a Plant

You can select a Plant, Unit, Position, or Shift in the User Profile screen in case you missed it while logging in. This functionality helps you synchronize only the required data relevant to the selected plant.

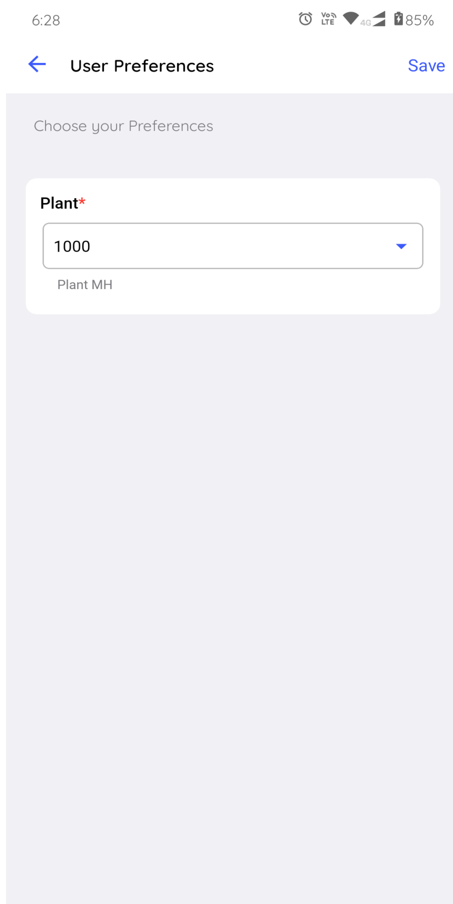
> **Note:**
> You can choose preferences for the Plant, Unit, Position, or Shift only when you are assigned to multiple plants, units, positions, or shifts. If you are assigned to one plant, unit, position, or shift, the option is grayed out and the Unit, Position, and Shift values are displayed based on the selected Plant.

To select or change a plant:

1. In the User Profile screen, tap **User Preferences**.
2. In the User Preferences screen, select a plant from the **Plant** list to sync data.
3. Select **Unit**, **Position**, or **Shift** from the list to sync relevant data.

    > **Note:**
    > The Unit, Position, or Shift values are displayed based on the selected Plant.

Figure 2-14 Select Plant



4. Switch on the **Sync Task Reading History** toggle to sync the last N question reading history.
5. Tap **Save**.

   The application starts syncing the data based on the selected user preferences.

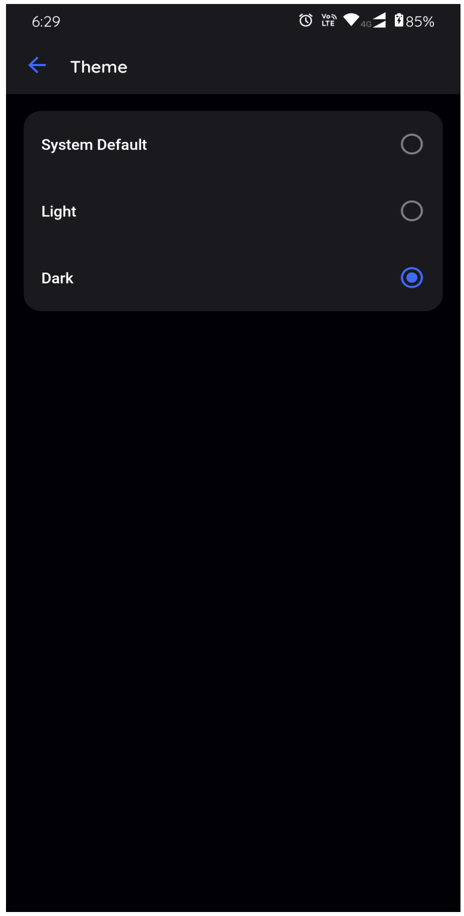
2.1.2.2. Switch between Dark mode and Light mode

You can switch between Dark or Light Mode for enhanced visibility, especially in low-light conditions.

To change the mode or theme:

1. In the User Profile screen, tap **Theme**.
2. In the **Theme** window, select the following preferred mode:

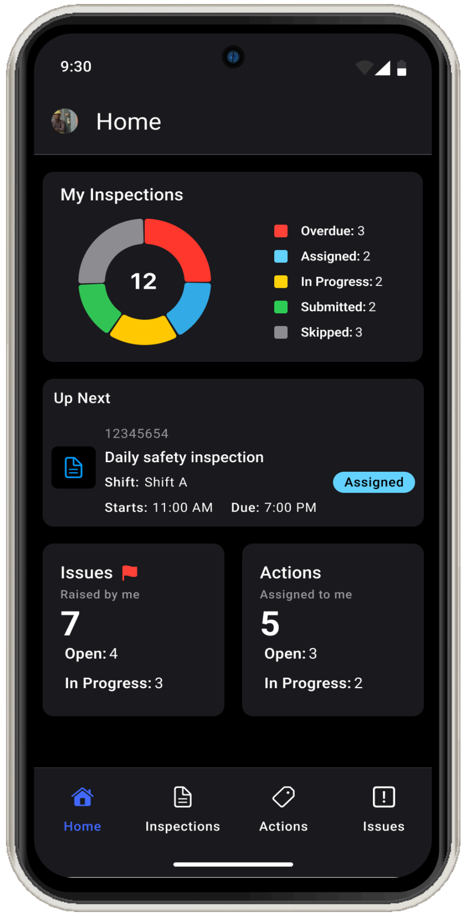
Figure 2-15 Select Theme



- **System Default**: The application’s color displays based on system or mobile default settings (light or dark). It is selected by default.
- **Light**: The application's color displays in light and vibrant.
- **Dark**: The application's color displays in black or dark with low brightness.

The mode or theme is changed and the same is displayed across the application.

Figure 2-16 Dark Mode



2.1.2.3. Change the Language

You can view and access the application in your preferred language.

To change the language:

1. In the **User Profile** screen, tap **Settings**.
2. Tap **Localization**.
3. Select the preferred language from the **Language** list and tap **Confirm**.

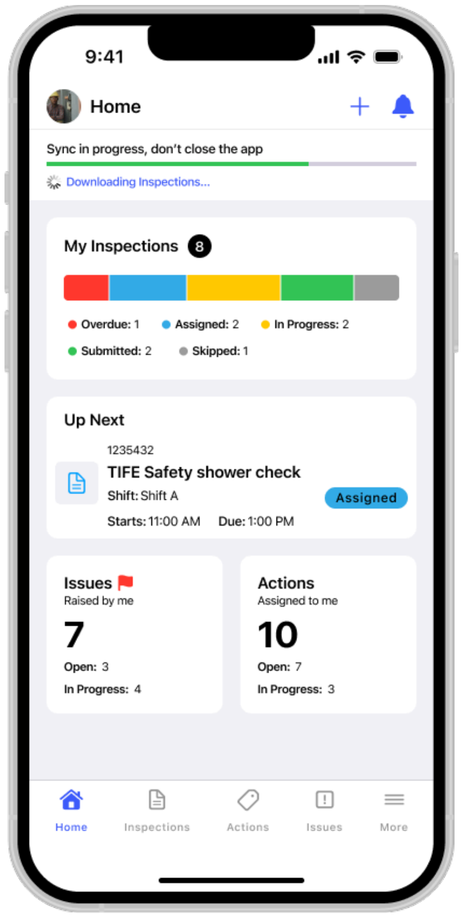
   The application is displayed in the selected language.

2.1.3. Access Forms in Offline Mode

mInspections application is designed to work seamlessly even under low or no internet connectivity.

When users log in to mInspections, the app automatically connects to the server and downloads data to your device. As a Technician, you can fill the inspections data in areas with low or no network connectivity. The updates are automatically synced to the server once you regain network connection. This ensures you always have access to the latest data.

Figure 2-17 Sync Progress



2.1.4. Search & Filter Inspections, Issues, and Actions

Search and filters help you to find the relevant information you need efficiently and effortlessly.

This chapter has the following topics:

- Search Inspections, Issues, and Actions *(on page 55)*
- Filter Inspections, Issues, and Actions *(on page 56)*

2.1.4.1. Search Inspections, Issues, and Actions

Search functionality helps you to find the specific information with minimal effort.

To search inspections, issues, and actions:

1. Tap the **My Inspections**/**Open Inspections** tab.
   For issues and actions tap **My Issues**/**Open Issues** tab or **My Actions**/**Open Actions** tab respectively.
2. Enter the name in the **Search** field.

   The search results are displayed.

2.1.4.2. Filter Inspections, Issues, and Actions

Filter helps you locate specific information quickly within extensive search results.

To filter inspections, issues, and actions:

1. Tap the **My Inspections**/**Open Inspections** tab.
   For issues and actions tap **My Issues**/**Open Issues** tab or **My Actions**/**Open Actions** tab respectively.
2. Tap the Filters icon.
3. In the window, select the **Due Date** and **Status** values in case of My Inspections, and **Due Date**, **Created By** and **Inspections (with or without User Group)** values in case of Open Inspections from the drop-down.
4. Tap **Apply**.

The filtered forms are displayed.

Tap **Reset** to clear the filter.

Figure 2-18 Filter My Inspections

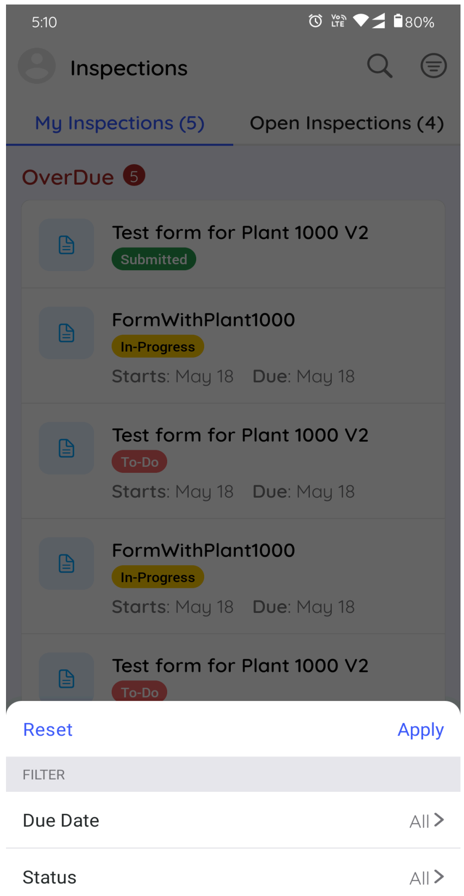
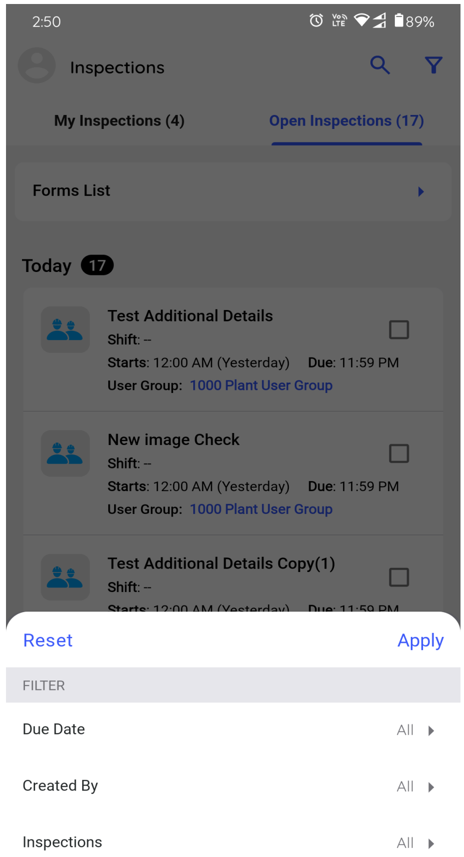


Figure 2-19 Filter Open Inspections



2.2. Conduct Inspections

This section explains how to use the mInspections mobile application for inspecting assets and recording data.

This section has the following topics:

- Conduct Inspections *(on page 58)*
- Self-assign Open / Unassigned Inspections *(on page 65)*
- Generate Submitted Inspections in PDF Format *(on page 68)*
- Create Ad-Hoc Inspections *(on page 69)*

2.2.1. Conduct Inspections

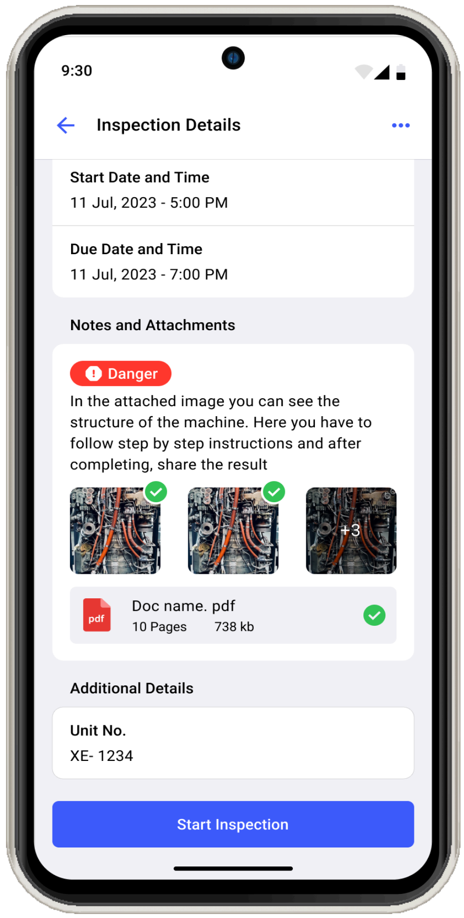
Inspections provide detailed tasks for asset inspection checks, guiding technicians to follow steps for executing asset maintenance tasks and capturing data.

To inspect an asset assigned to you:

1. In the **Inspections** screen, tap the **My Inspections** tab.
2. Select an inspection from the assigned inspections list.

   The **Inspection Details** screen is displayed. In this screen, you can view round details, relevant notes & attachments, and so on.

   Figure 2-20 Start Inspection

3. Tap **Start Inspection**.

   The timer starts to record the duration of the inspection execution.

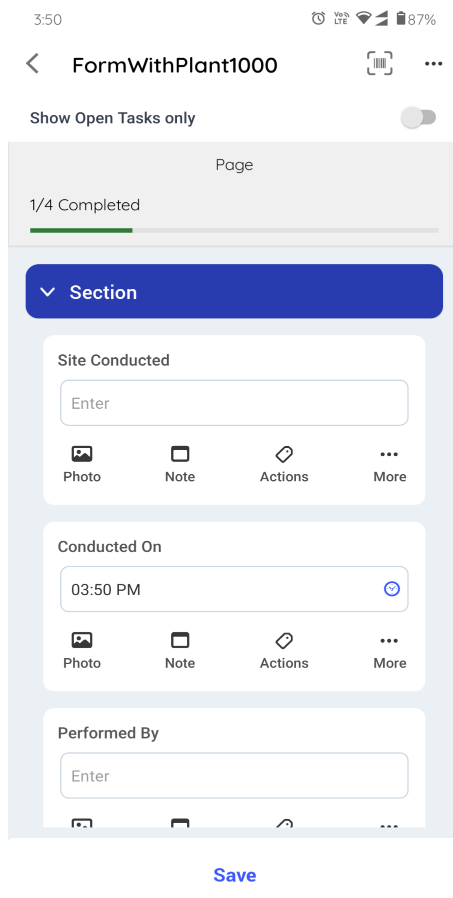
   The Asset Details screen with the list of questions is displayed.

   Productivity Hacks:

- Navigate through the inspection using the Previous and Next icons and execute questions.
- View only open questions using **Show Open Questions Only** slider.
- Navigate through the pages using **Page 1**, **Page 2**, **Page 3**, and so on buttons.

4. Expand each section in a page to fill the details in the question as you do inspection.

Figure 2-21 Expand Sections



5. Fill the details in the question using any of the following choices.
    - Read Only Field
    - Text Answer
    - Number
    - Check box
    - Scan
    - Date and Time
    - Slider
    - Geo Location (To capture an asset location)
    - Date Range

- Photo
- Signature
- Hyperlink
- Instructions
- Multiple Choice
- Global Picklist

> **Note:**
>
> You can enter decimal and negative values when filling questions that have a number response type.

Productivity Hacks:

- View the calculated value or result in the numeric response field based on the pre-configured formula in the Web application. For more information, see Add Formulas to fields *(on page 108)*.
- Tap the **Attachments** icon to add photos, videos, audios (up to 1 minute), and documents (PDF, Word, or Excel) of an asset or equipment.

  > **Note:**
  > You can view and access these attachments as links in the generated PDF after submitting the inspection. Click the link to download the attachment.

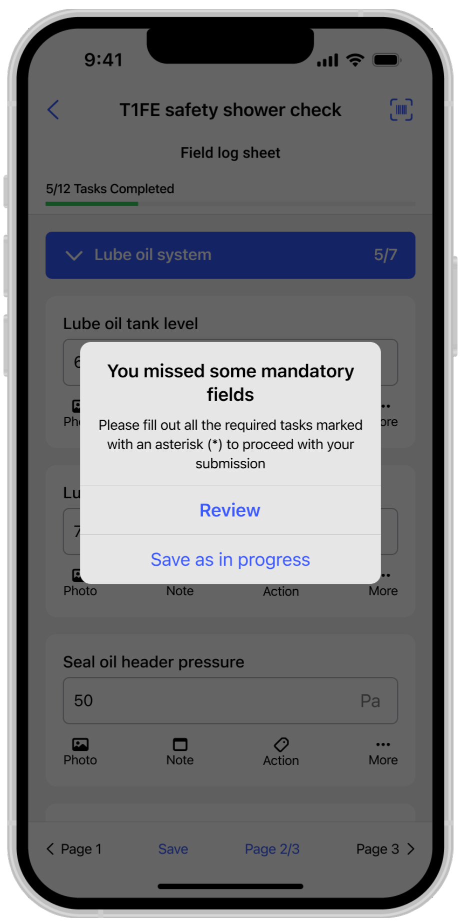
- Tap the **Note** icon to add notes or additional information.
- Tap the **Actions** icon to create an action for the asset. For more information, see Create an Action *(on page 80)*.
- Tap the **More** icon > **Create Issue** to create an issue for the asset. For more information, see Create an Issue *(on page 72)*. When you tap Create Issue, a pop-up with following options is displayed:
  - **Show Issues**: Tap the option to view the history or previously created issues against the asset/location.
  - **Create New Issue**: Tap the option to create or raise a new issue.
  - **Cancel**: Tap the option to cancel the issue creation process.
- Tap the **More** icon > **Show Additional Details** to create an issue for the asset.

6. Tap **Page 1**, **Page 2**, or **Page 3**... to navigate to the next page.
7. Tap the **Save** button if you want to save and update the form details later.

   A message "Inspection Saved Successfully" appears, and the status of the inspection is changed to In Progress. This saved inspection appears in the **My Forms** tab under the In Progress section.

> **Note:**
> If there are pending or open tasks, data in the fields not filled in, or if the inspection is partially completed, a warning message "You missed some mandatory fields" is displayed. Tap **Review** to review the pending tasks or fields or tap **Save as in Progress** to save the inspection and update it later.

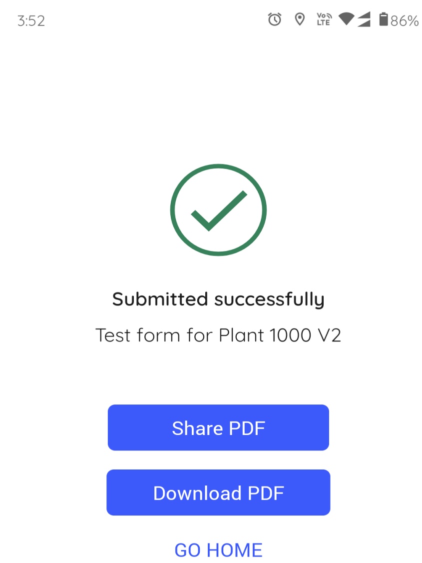
Figure 2-22 Submit Inspection



8. Tap **Submit** after filling in all the details.
9. In the Submission Confirmation pop-up, tap the **Submit** button after filling in all the details.

   A message "Inspection Submitted Successfully appears" with the **Share PDF** and **Go Home** buttons. The timer stops once the inspection is submitted and you can view the duration of the inspection execution

Figure 2-23 Submitted Inspection



2.2.1.1. Skip Inspections

Skip the inspections that are not mandatory or no longer required.

To skip the inspection:

1. Open the inspection.
2. In the **Inspection Details** screen, tap the More ••• icon > and select **Skip Inspection**.
3. Select a relevant reason such as Plant Shutdown, Insufficient Resources/Spares, Locations/Assets Inaccessible, Environmental Hindrance, Safety Concerns, or Others.

   The inspection is skipped and it is displayed in the **My Inspections** tab with the Skipped status and then removed after 24 hours (configurable).

2.2.1.2. Skip Questions

Skip the questions if they are not mandatory or not required.

To skip a question:

1. In the Asset Details screen, Tap the More ••• icon > and select **Skip Question**.
2. In the **Skip Reason** window, select a relevant reason such as Offline, Out of Service, Inaccessible, Task not relevant, or Others to skip the questions.

   > **Note:**
   > You can provide a custom response if the reason is not present in the drop-down.

   The question is skipped.

   The Questions Summary section displays the count of skipped questions within each asset, and the progress bar excludes skipped questions from the completed count. The skipped status of questions reflects in both the generated PDF and the Inspections screen.

   You can tap **Unskip** next to the skipped question to unskip the task.

2.2.1.3. View Historical Data

View the historical data of a numeric field and identify deviations. The history is presented as a line chart for Number and Slider response types, highlighting past readings or transactions. The charts display task names, dates, readings, and technicians for each entry, providing detailed insight into the data history.

To view the historical data or past readings:

1. Open an inspection.

   The Asset Details screen is displayed along with the questions.

   You can view the previous readings above the numeric fields or questions, as well as any exceptions such as warnings, alerts, and notes.

2. Tap on **Exceptions** below the Number or Slider response type.
   The historical data or number of exceptions raised against the readings in the earliest shift are displayed in the line chart format.

2.2.2. Self-assign Open / Unassigned Inspections

If no inspections are assigned to you, you can self-assign unassigned inspections from the Open Inspections tab.

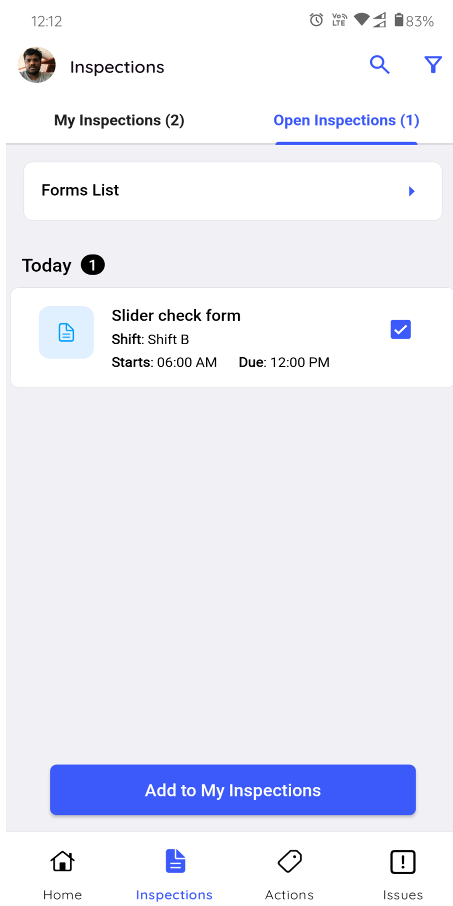
To self-assign an inspection:

1. In the **Inspections** screen, tap the **Open Inspections** tab.
2. Open the inspection you want to assign yourself.
3. In the **Inspection Details** screen, verify the details and tap **Add to My Inspections**.

   or

   In the Open Inspections tab, you can just select the checkboxes next to the inspections and tap **Add to My Rounds** to assign multiple inspections at a time.

   Figure 2-24 Self-assign Inspections

   Selected inspections are assigned to you and displayed in the **My Inspections** tab.

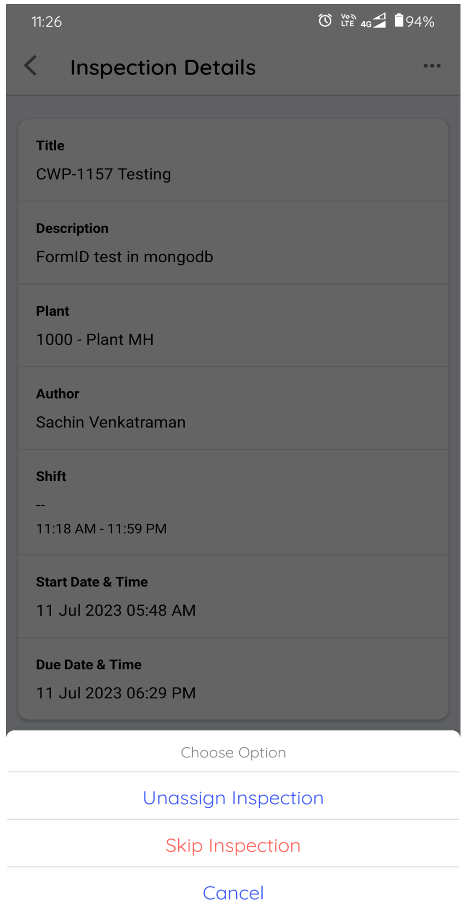
2.2.2.1. Unassign Assigned Inspections

You can remove an assigned inspection to free it up for reassignment, allowing for flexibility in scheduling maintenance adjustments.

To unassign an Assigned inspection:

1. In the **Inspections** screen, tap the **My Inspections** tab.
2. Tap the inspection with the **Assigned** status.
3. In the **Inspection Details** screen, tap the More ● ● ● icon and select **Unassign Inspection**.

   Figure 2-25 Unassign Assigned Inspection

   A message "Are you sure you want to Unassign the inspection?" is displayed.
4. Tap **Unassign**.
   The inspection is unassigned and moved from the My Inspections tab to the Open Inspections tab and the inspection is displayed with Open status.

2.2.2.2. Unassign In Progress Inspections

If unable to work on assigned inspections, you have the option to unassign them, allowing other technicians to take over and complete the inspections.

This feature enables reassignment flexibility, facilitating inspection scheduling adjustments.

To unassign an In-Progress inspection:

1. In the **Inspections** screen, tap the **My Inspections** tab.
2. Tap the inspection with the **In Progress** status.
3. In the **Inspection Details** screen, tap **Resume Inspection**.
4. Tap the More icon on the top right of the screen and select **Unassign Inspection**.
   A message "Are you sure you want to Unassign the inspection?" is displayed.
5. Tap **Unassign**.
   The inspection is unassigned and moved from the My Inspections tab to the Open Inspections tab it is displayed with **Partly Open** status with the name of the technician who worked on it earlier.

2.2.3. Generate Submitted Inspections in PDF Format

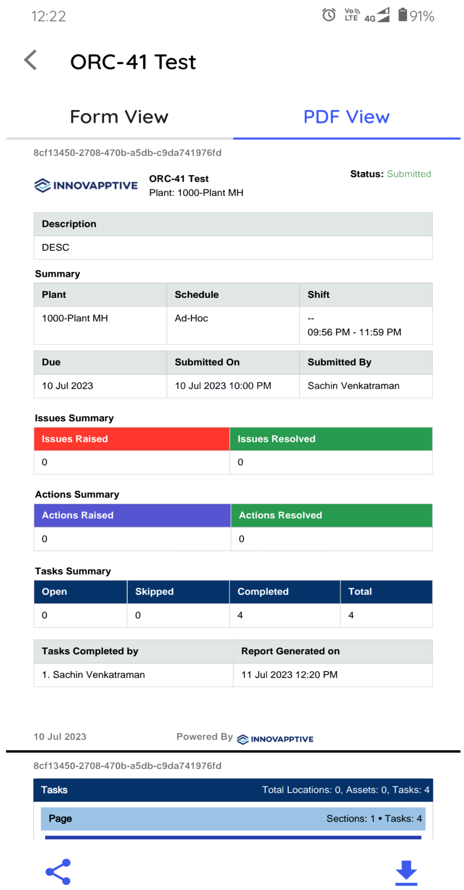
You can generate, view, share, and download the submitted inspections in PDF format to easily share critical observations related to the inspection data with stakeholders.

To generate, view, share and download the submitted inspections in PDF format:

1. In the **Inspections** screen, tap on the **Submitted** section.
2. In the **Submitted Forms** screen, open the submitted inspection.
3. In the **Inspection Details** screen, tap **Show Inspection**.

   Tap the More icon on the top right corner to download the PDF or share the PDF.
4. In the **Form View** tab, select each asset to view the submitted inspection details in Form format.
5. Tap the **PDF View** tab.
   A message "PDF Generated Successfully appears" and you can view the submitted inspection details in PDF format.

Figure 2-26 View Inspection in PDF Format



6. Click the Share icon to share the PDF document with others.

7. Click the Download icon to download the PDF document.

   You can configure the PDF in the web application as needed. For more information, see Configure Round Plan Details PDF *(on page 132)*.

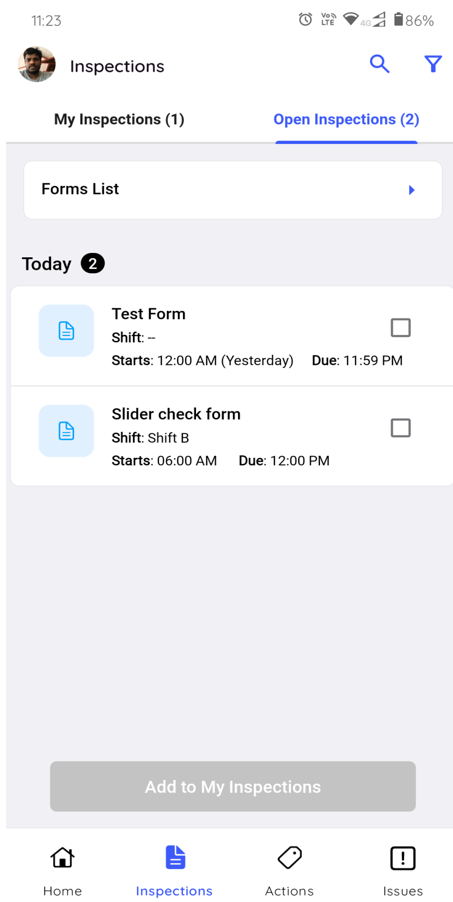
2.3. Create Ad-Hoc Inspections

You can generate an Ad-hoc inspection from Published inspections from the mobile app if you observe any anomalies in an equipment/functional location.

To generate an ad-hoc inspection from the mobile app:

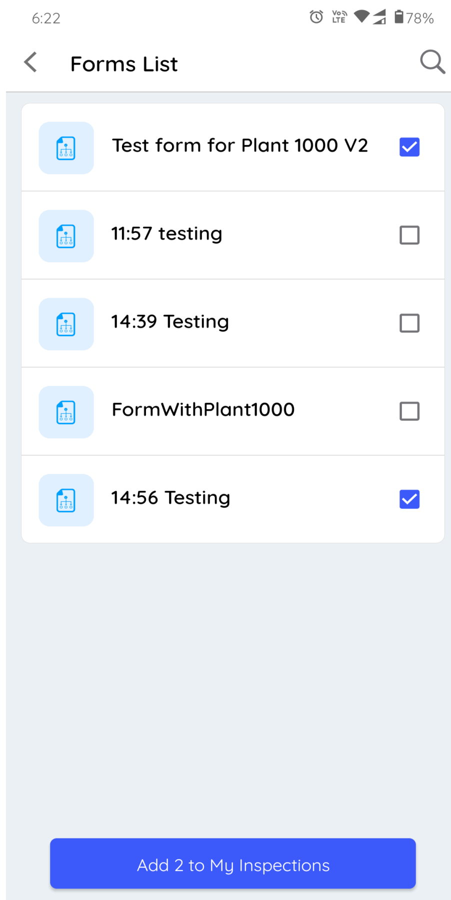
1. Tap the **Open Inspections** tab.
   You can view the Forms List section along with the list of unassigned inspections.

Figure 2-27 Forms List Section



2. Tap **Forms List**.
3. Select an inspection for which you want to create an ad-hoc inspection.

Figure 2-28 Select Inspections



4. Tap the **Add to My Inspections** button.

   Inspection added successfully message appears.

   The inspection is added to the **My Inspections** tab with Assigned status.

   Inspections generated from the mobile app are visible in the web app in the Inspections tab of the Scheduler screen with the name of the Assignee as the name of the technician who filled inspection data, Schedule as Ad-hoc and status as Assigned.

2.4. Create and Manage Issues

Create an issue when you identify anomalies while conducting inspections and close the issue that is assigned to you once the anomaly is resolved.

This chapter has following sections:

2.4.1. Create an Issue

Create an issue if you find an anomaly while conducting inspection that requires an investigation.

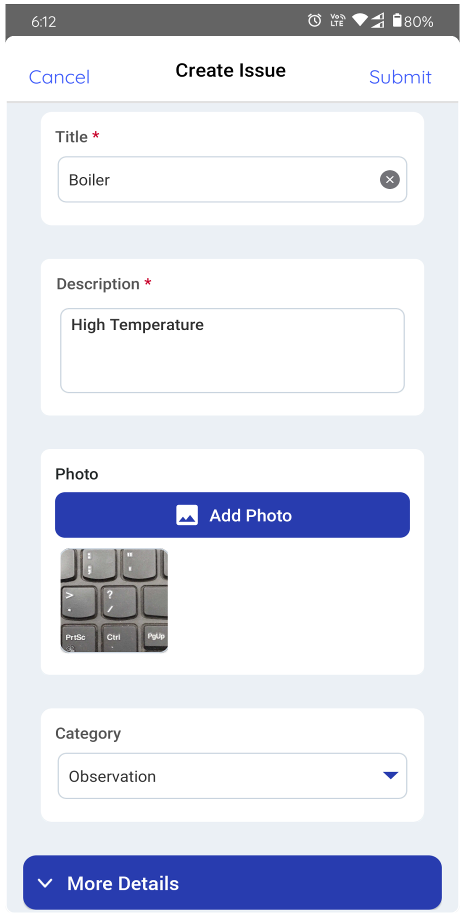
To create an issue:

1. In the **Issues** screen, tap the **Add Issue** + button at the bottom.
2. In the **Create Issue** screen, do the following:
    a. Enter the issue title in the **Title** field.
    b. Enter the issue description in the **Description** field.
    c. Tap the **Add Photo** button in the **Photo** field to add images.
    d. Select the **Category** as **Observation**, **Maintenance**, **Incident**, **Near Miss**, or **Hazard** from the drop-down.

    > **Note:**
    > If you select the **Category** as **Maintenance**, the **Convert to ERP Notification** toggle is changed to **Yes** and the issue is converted to a notification automatically.

    e. Select the **Priority** as **High**, **Medium**, or **Low** from the drop-down.

Figure 2-29 Create Issue

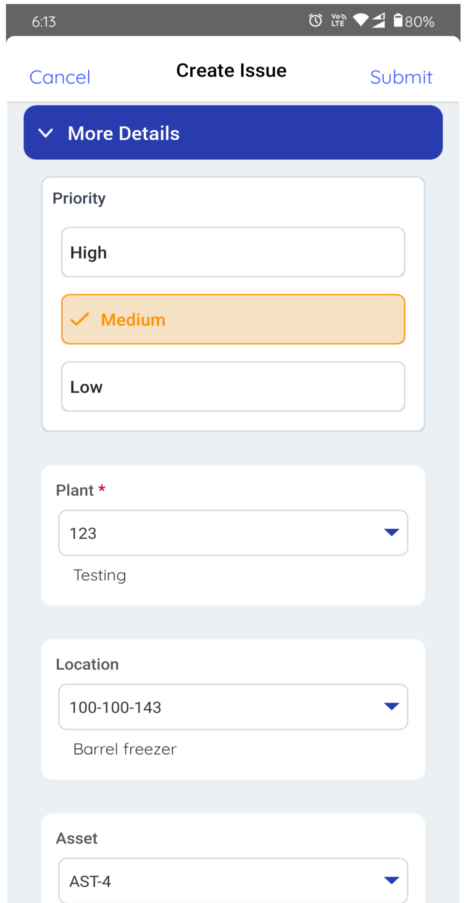


f. Expand the **More Details** section, do the following.
   i. Select the relevant plant in the **Plant** drop-down.
   ii. Select the relevant location in the **Location** drop-down.
   iii. Select the relevant asset in the **Asset** drop-down.
   iv. Select a technician in the **Assign to** drop-down to assign the issue. Tap **Save** once you select the users.
   v. Select the **Start Date and Time**.
   vi. Select the **Due Date and Time**.
   vii. Select the **Status** as **Open**, **In-Progress**, or **Resolved**.
   viii. Select the **Yes** toggle button of the **Convert to ERP Notification** field if you want to convert the issue to notification.

Note:

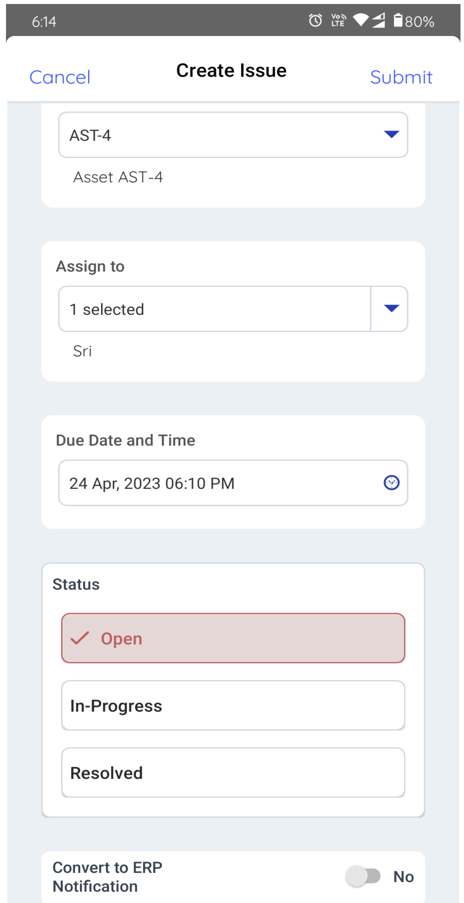
- You can click on the help icon to see the instructions to determine risk matrix based Priority.
- The following data is automatically updated in the notification:
  - The Priority determination values are updated to field TechInspectn by (VIQMEL-INSPK).
  - The Selected RISK matrix is updated in the Notification Long text.
  - For the Shutdown and Turnaround Priorities, if you select the consequence Impact, likelihood, and Spare availability, are available and mapped to SAP Accordingly.
- The Required Start date, End Date, Priority, and Photo attachments of the Notification get reflected in the SAP. Also, the Maintenance Plant Field mapping to the Location tab happens in Notification.

Figure 2-30 Fill the details



3. Tap the **Create** button on top right.

Figure 2-31 Submit Issue



Issue Created Successfully message appears and you can see the newly created issue in the **Open Issues** tab. If the issue is assigned to you then you can see it in the **My Issues** tab.

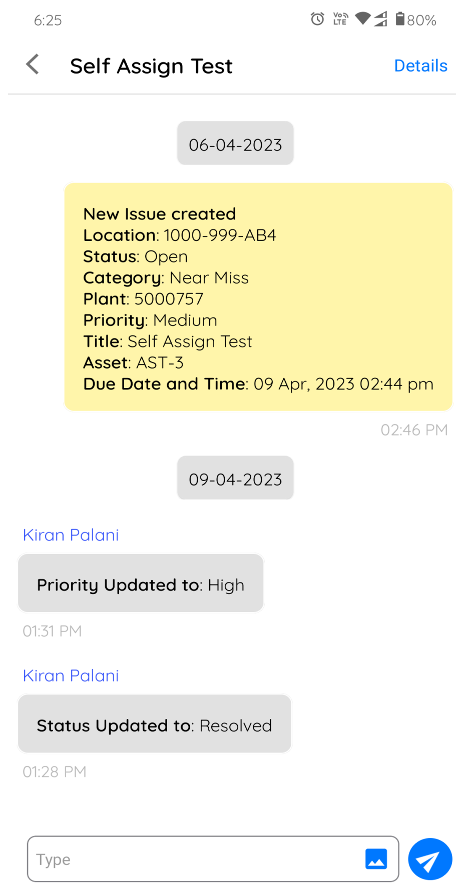
2.4.2. Update an Issue

You can update an issue that is assigned to you.

To update an issue:

1. Open the issue assigned to you, which is in Open or In Progress state.
   Issue chat box or log history is displayed.

   Figure 2-32 Issues Log History



2. Tap the **Details** button on the top right.
   Issue Details screen is displayed.
3. Tap the **Edit** button on the top right.
4. Update any of the following fields:

- Photo
- Priority
- Assign to
- Start Date and Time
- Due Date and Time
- Status

> **Note:**
> You can change the status from Resolved to Open if that issue is not yet resolved even after following up on it. Any photos that are attached in the chat box will appear under the Photo form field. But photos attached in the Photo form field will not be displayed in the chat box.

5. Tap the **Save** button.

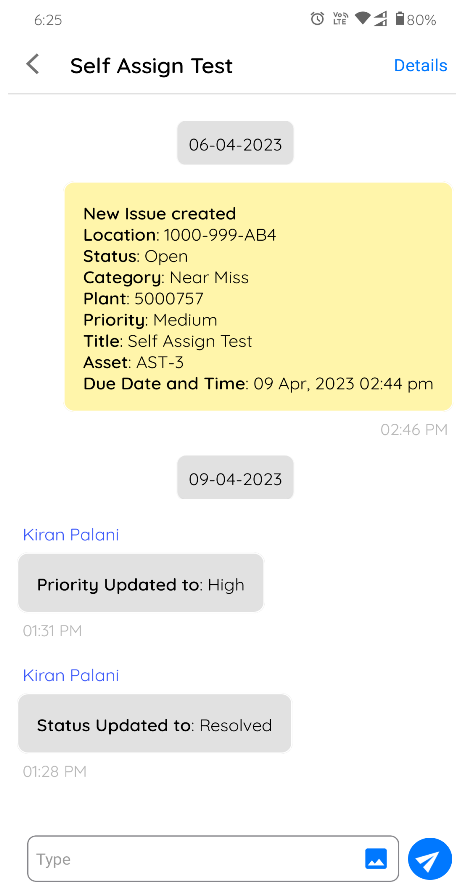
2.4.3. Close an Issue

You can mark an issue as closed once it is resolved.

To close or resolve the issue:

1. Open the issue assigned to you, which is in Open or In Progress state.
   Issue chat box or log history is displayed.

   Figure 2-33 Issues Log History

2. Enter the text in the text box and tap the Enter icon to provide the updates related to the issue to your supervisor. You can also add images as evidence.
3. Tap the **Details** button on the top right.
4. In the **Issue Details** screen, tap the **Edit** button on the top right.
5. Expand the **More Details** section, update the details as required and select the **Status** as **Resolved** if the issue is resolved.
   Issue Updated Successfully message appears and the Status of the issue is changed to Resolved.

2.5. Create and Manage Actions

Create an action to follow-up on an issue that is marked as resolved and close once you review and gather information about the issue.

This chapter has following sections:

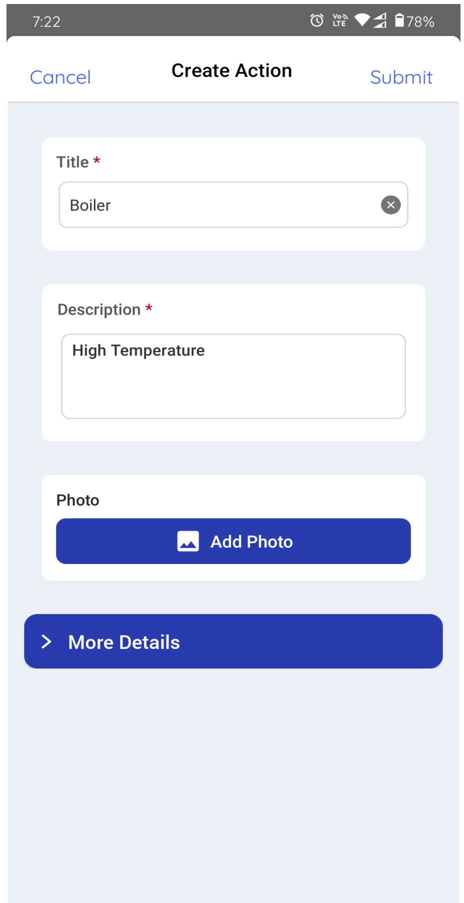
2.5.1. Create an Action

Create a follow-up action when you observe that an issue is marked as resolved and needs further investigation by a technician.

To create an action:

1. In the **Actions** screen, tap the **Add Action**  button at the bottom.
2. In the **Create Action** screen, do the following:
    a. Enter the action title in the **Title** field.
    b. Enter the action description in the **Description** field.
    c. Tap the **Add Photo** button in the **Photo** field to add images.
    d. Select the **Priority** as **High**, **Medium**, or **Low**.
    e. Expand the **More Details** section, do the following.

Figure 2-34 Create Action



i. Select the **Plant**, **Location**, and **Asset** from the respective dropdowns.

ii. In the **Assign to** drop-down,

- Choose **Users** and select users or technicians from the list.

  Or

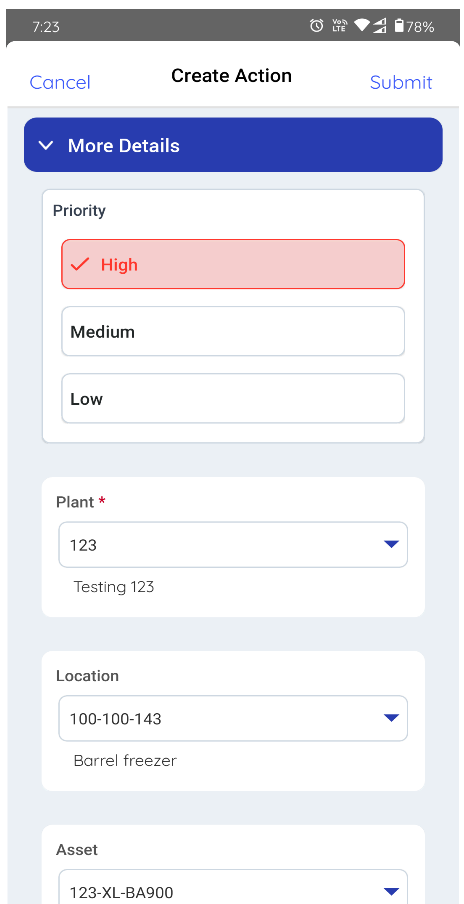
- Choose **Usergroup** and select user groups from the list.
- Tap **Save**.

> **Note:**
> Actions assigned to both User and Usergroup are displayed in the My Actions tab for every user.

iii. Select the **Due Date and Time**.

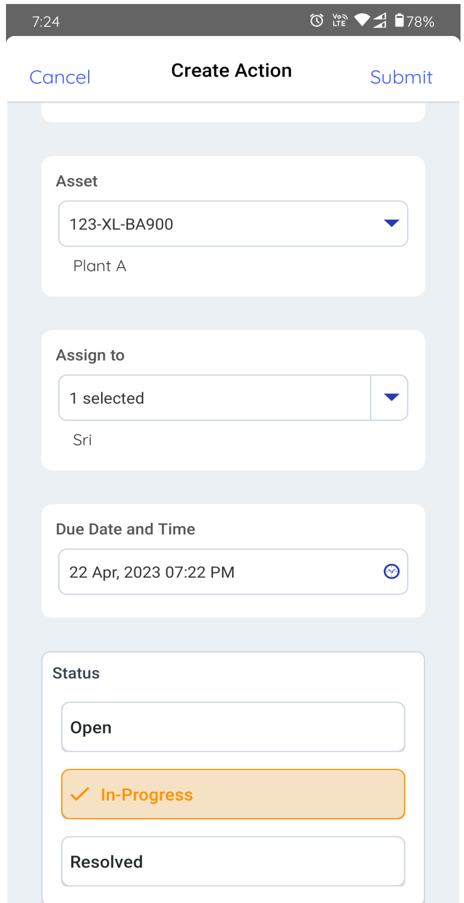
iv. Select the **Status** such as **Open**, **In-Progress**, or **Resolved**.

Figure 2-35 Fill the details



3. Tap the **Create** button on the top right.

Figure 2-36 Submit Action



Action Created Successfully message appears and you can see the newly created action in the **Open Actions** tab. If the action is assigned to you, then you can see it in the **My Actions** tab.

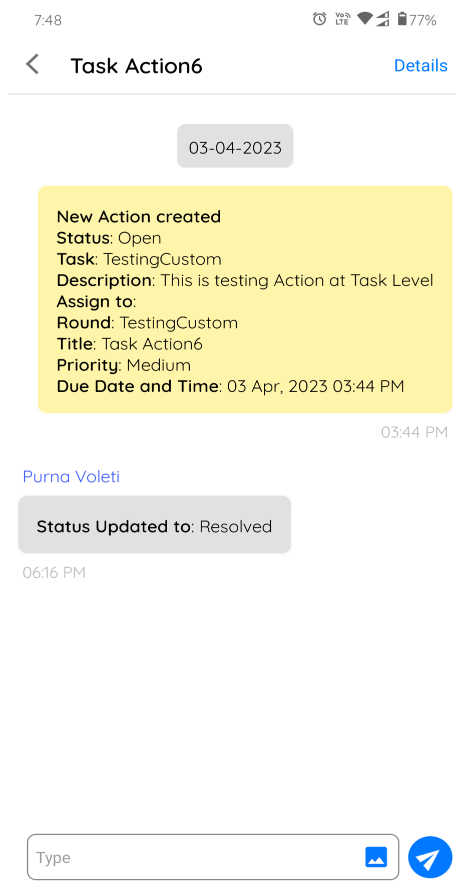
2.5.2. Update an Action

You can update an action that is assigned to you.

To update an action:

1. Open the action assigned to you, which is in Open or In Progress state.
   Action chat box or log history is displayed.

Figure 2-37 Actions Log History



2. Tap the **Details** button on the top right.
   Action Details screen details are displayed.
3. Tap the **Edit** button on the top right.
4. Update any of the following fields:

- Photo
- Priority
- Assign to
- Start Date and Time
- Due Date and Time
- Status

> **Note:**
> You can change the status from Resolved to Open if that action is not yet resolved even after following up on it. Any photos that are attached in the chat box will appear under the Photo form field. But photos attached in the Photo form field will not be displayed in the chat box.

5. Tap the **Save** button.

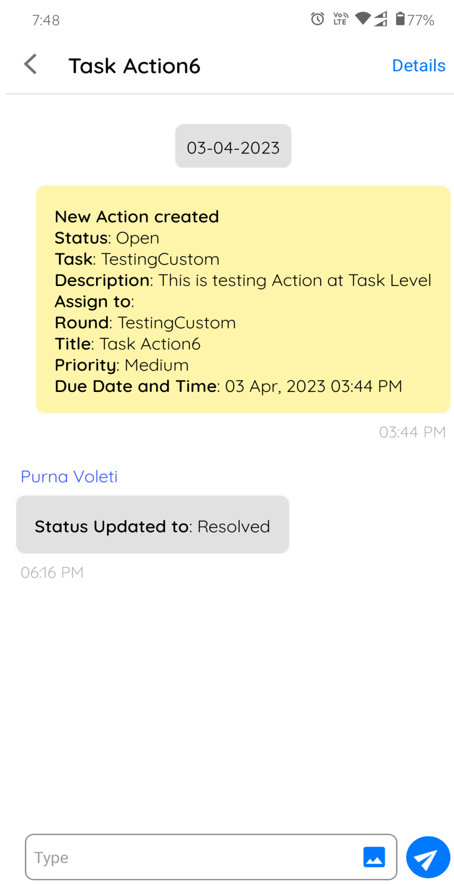
2.5.3. Close an Action

You can close an issue once it is resolved.

To close or resolve the action:

1. Open the action assigned to you, which is in Open or In Progress state.
   Action chat box or log history is displayed.

   Figure 2-38 Actions Log History

2. Enter the text in the text box and tap the Enter icon to provide the updates related to the action to your supervisor. You can also add images as evidence.
3. Tap the **Details** button on the top right.
4. In the **Action Details** screen, tap the **Edit** button on the top right.
5. Expand the **More Details** section, update the details as required and select the **Status** as **Resolved** if the action is resolved.
   Action Updated Successfully message appears and the Status of the action is changed to Resolved.

3. Creating Asset Inspection Forms using the Web App

This chapter outlines the features of the web application, including creating and scheduling forms, managing issues and actions, creating ERP notifications, and performing archive and search functions.

This chapter has the following sections:

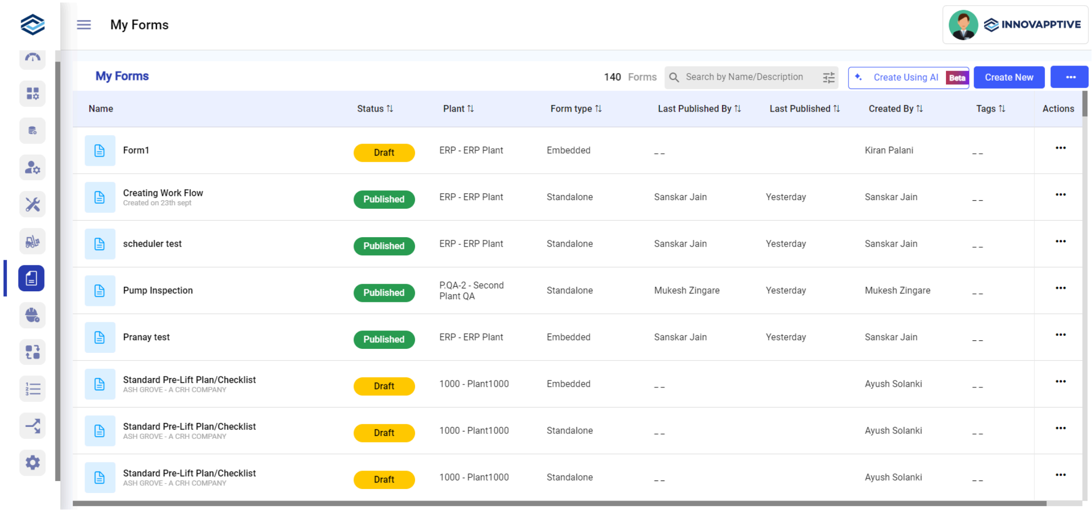
3.1. Overview of the Web Application

The mInspections web application features sections for managing forms, scheduling inspections, monitoring issues, and handling archived forms. Users can create, edit, schedule, monitor, and archive forms, as well as manage follow-up actions and use templates for regular inspections.

My Forms

My Forms: The **My Forms** section lists the forms that are in **Draft** and **Published** statuses. The count of the total number of forms is displayed on the top right. You can sort forms by Form Name, Status, Last Published By, Last Published, and Created By. When you select a form, you can view the summary on the right side. You can also **Create**, **Search**, **Edit**, **Copy**, and **Archive** forms from this section.

Figure 3-1 My Forms Screen

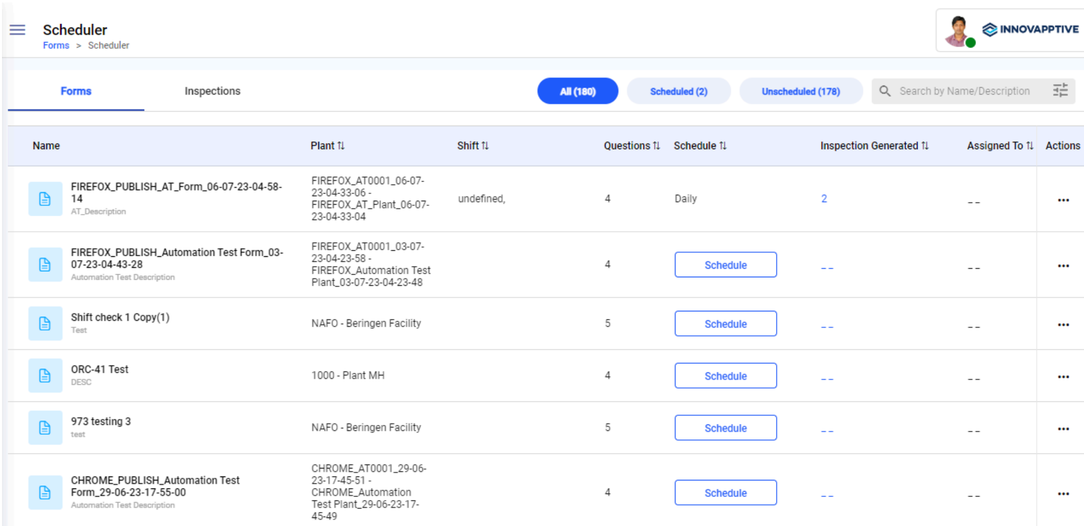


Scheduler

Scheduler: The **Scheduler** section allows Form Authors to schedule and assign the published forms to technicians. This section consists of two tabs: Forms and Inspections.

- **Forms**: The Forms tab lists all the published inspections that are either scheduled or unscheduled. You can filter forms by selecting either **All**, **Scheduled**, or **Unscheduled** options at the top of the list. The scheduled forms allow you to view schedule details, modify schedule, and view rounds. You can also search and filter scheduled forms.
- **Inspections**: The Inspections tab lists all the scheduled forms that are in Open, In-Progress, and Completed status. It also lists forms that are unassigned to technicians. Forms that are assigned to the technicians and later unassigned are displayed with a partly open status. You can view forms, form details, and inspections. You can also search and filter scheduled forms.

Figure 3-2 Scheduler Screen

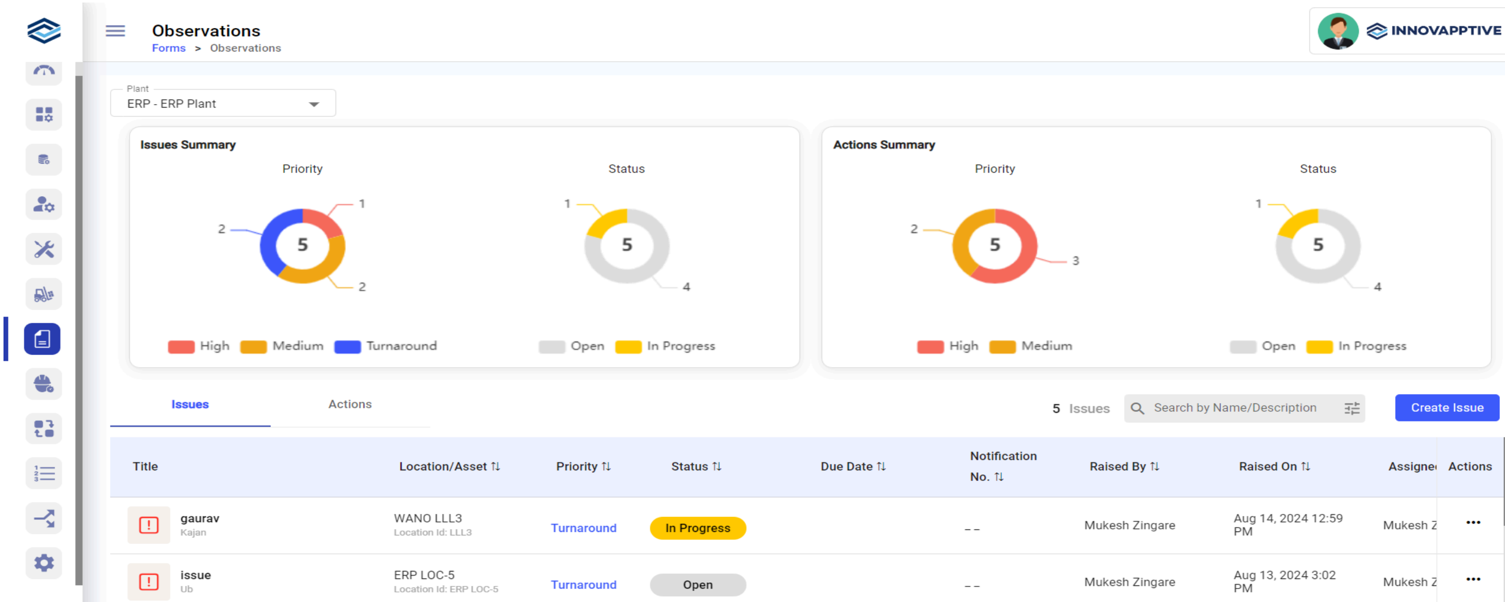


Observations

Observations: The **Observations** section allows Form Authors to monitor the status of issues and follow ups created by the technicians while executing the inspections from the mInspections application. This section graphically represents information related to Open Issues and Open Actions, categorized by their priority and status. This section consists of two tabs: Issues and Actions.

- **Issues**: The Issues tab lists all the issues reported by the technicians while filling in the forms. You can also search and filter issues.
- **Actions**: The Actions tab lists all the follow-up actions raised by the technicians. You can also search and filter actions.

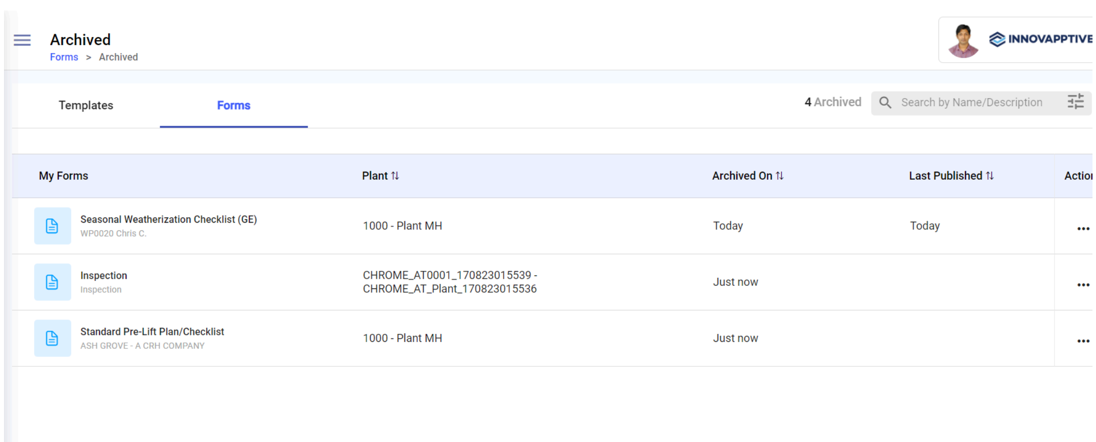
Figure 3-3 Observations Screen



Archived

Archived: The **Archived** section lists all the archived forms. It allows Form Authors to restore or permanently delete the archived forms if they are obsolete and no longer used. The list can be sorted by Plant, Archived, and Last Published. You can search archived forms and filter forms based on **Status**, **Modified By**, **Authored By**, and **Plant**.

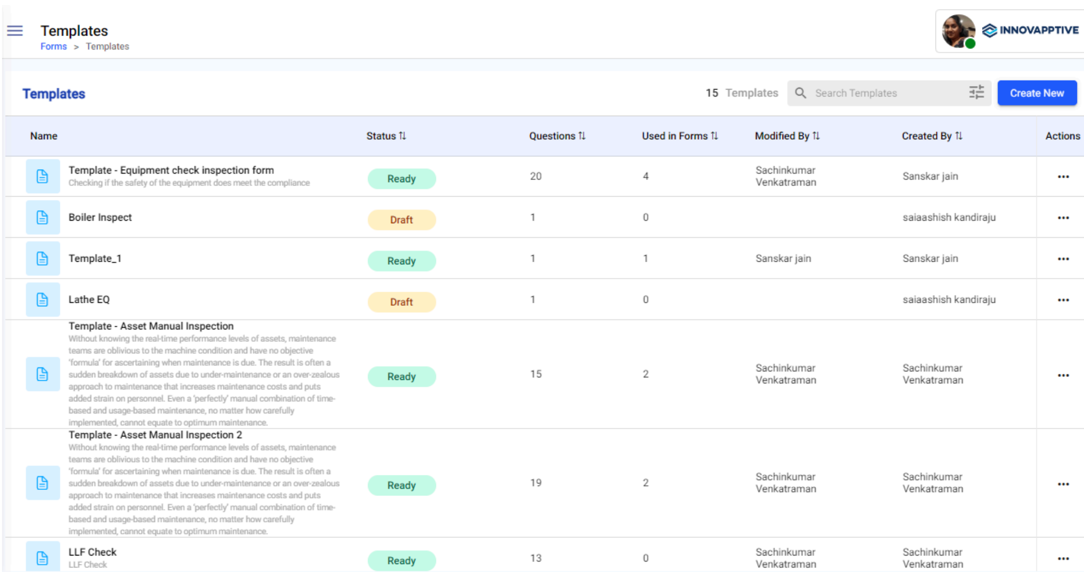
Figure 3-4 Archived Screen



Templates

Templates: The **Templates** section allows Form Authors to create forms from pre-designed templates. Form template is a pre-designed outline used to organize and schedule regular inspections for assets such as equipment, machinery, or facilities. It includes sections and questions for asset identification, maintenance schedules, inspections. The Template section lists all the forms in either Draft or Ready status.

Figure 3-5 Templates Screen



3.1.1. Log into the Web Application

This section provides guidance on logging into the web application.

This section has the following topics:

- Standard Login *(on page 91)*
- Login with SAP IDP *(on page 92)*

3.1.1.1. Standard Login

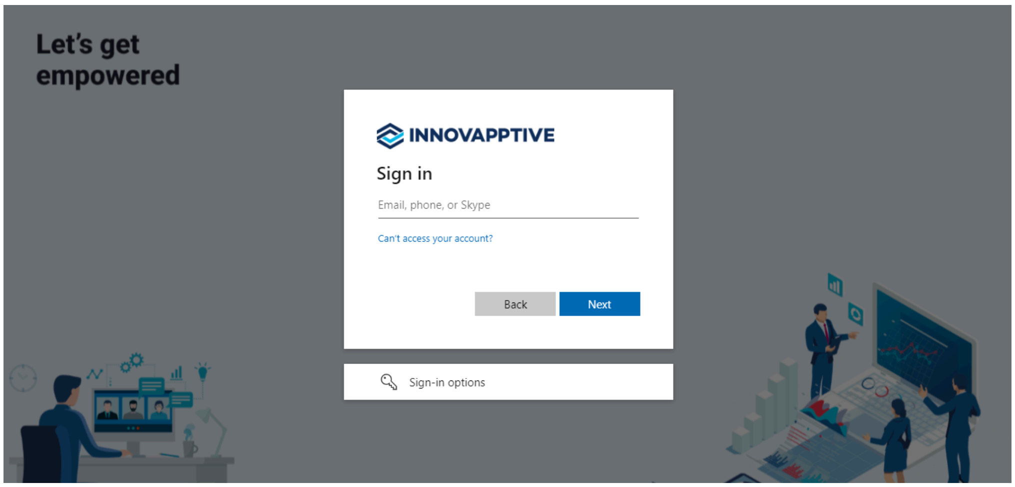
You can access the application through the URL and log in with your **User ID** and **Password**.

To log into the Web Application:

1. Open the application using the URL provided to you. Contact your Innovapptive representative for the URL.
2. Enter your **User ID** (Email, Phone, or Skype).

> **Note:**
> The Email ID should be registered with the **Tenant IDP**.

Figure 3-6 Sign in Screen



3. Click **Next**.
4. Enter your **Password**.
5. Click **Sign in**.

   The application takes you to the home screen.

3.1.1.2. Login with SAP IDP

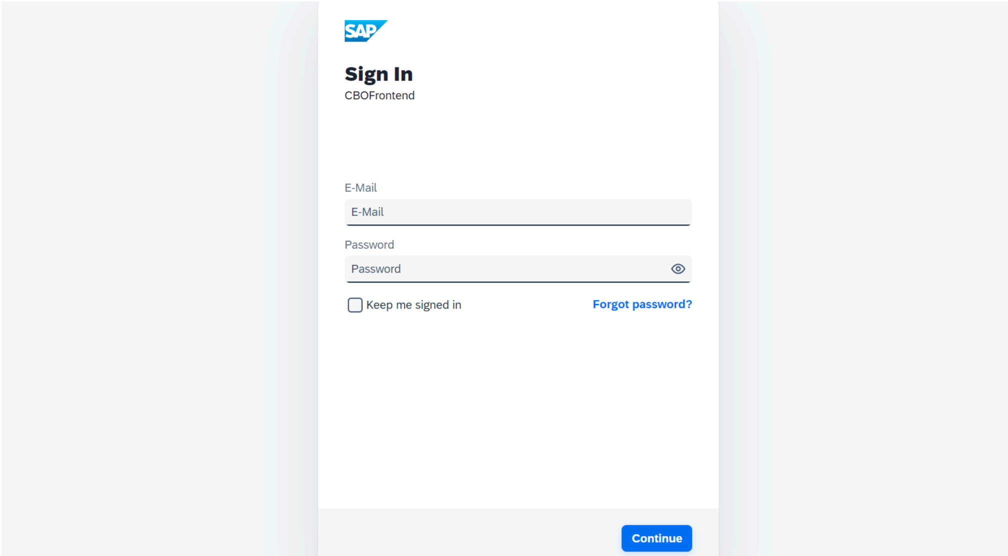
You can log into the web application using the SAP IDP.

> **Note:**
> This process is applicable only when the feature is set up by an admin.

To login using SAP IDP:

1. Open the web application using the URL.

Figure 3-7 Log in using SAP IDP



2. In the **Sign In** screen, enter your registered **Email** and **Password**.
3. Click **Continue**.

   The application displays the home screen.

3.2. Create and Schedule Forms

Form Author creates forms with multiple questions for asset inspections and publishes them. The published forms are assigned to technicians depending on their availability.

Technicians access the forms through the mInspections app, fill in the form details, and submit. For example, create a form to check the bearings, wiring, and other components twice a week or once in 15 days. Use the data obtained from the inspection to make proper in-time repairs by raising notifications for technicians.

A form has the following status:

- **Draft**: The form is created and saved. You can save forms and edit them unlimited times til you publish them.
- **Published**: The form is created and published, and it is ready to be scheduled.

3.2.1. Pointers for creating an effective form

A well-thought-out and structured form gives context for your technicians and helps them to complete their work quickly, correctly, and efficiently. Design your form comprehensively to:

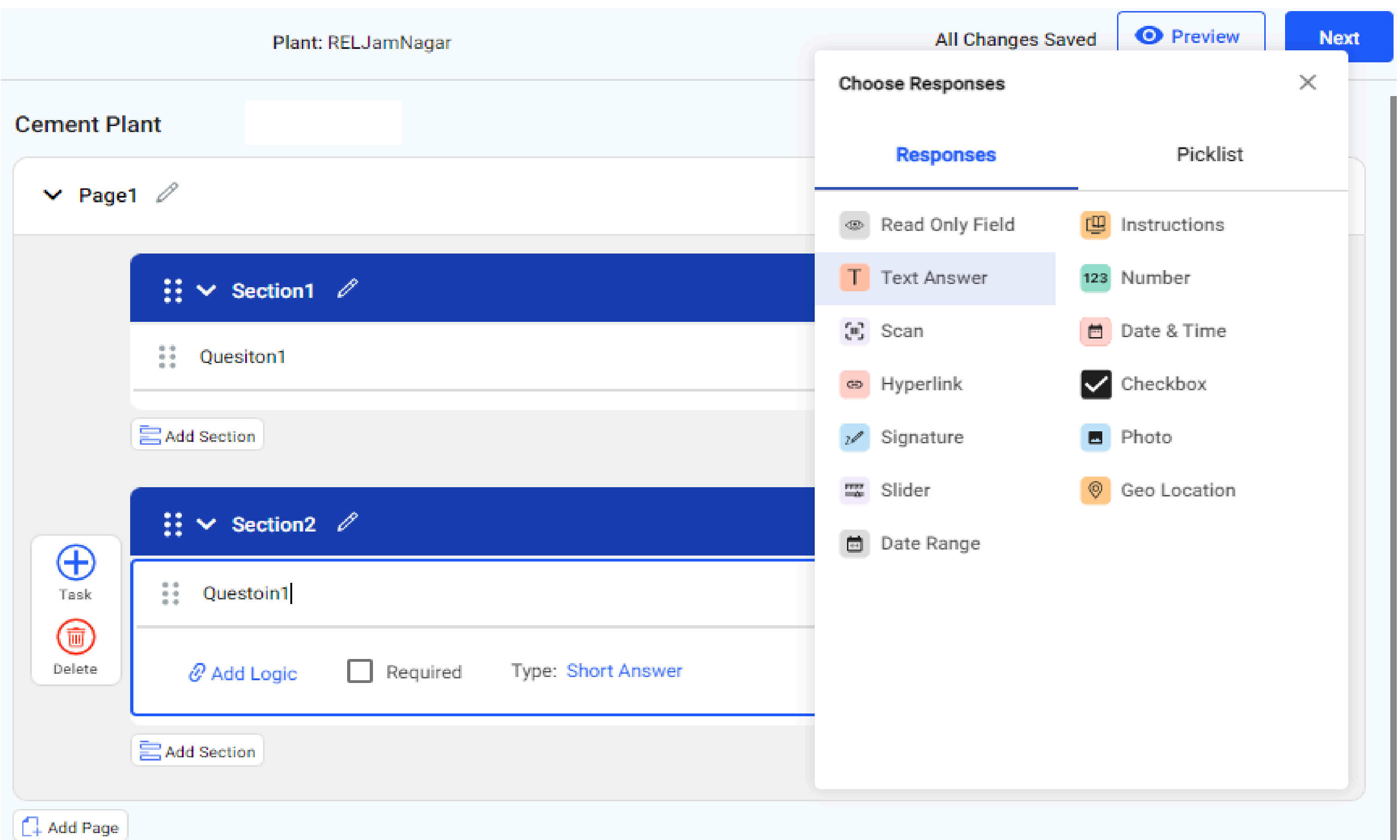
- Capture all the required information about the assets.
- Make it simpler to do inspections in an orderly manner.
- Enhance the field user experience.

Follow the below pointers to create an effective form:

Pages and Sections

Sections are groups of questions bunched together and pages may be either one or a group of sections. This logical organization of questions helps you to complete inspections quickly.

Structure forms using the following hierarchy:



- **Pages**

  Add pages to navigate quickly to the next page in the mobile application.

- **Sections**

  Add sections inside each page to group relevant questions together.

- **Questions**

  Add logical questions under each section with different response types along with the required conditional logic.

- **Standard Response Types**

  Standard response types are predefined formats that help capture asset inspection data consistently and efficiently. Standard Response Types are categorized into **Responses** and **Picklist**.

  The application supports the following Standard Response Types:

  - Read Only Field *(on page 97)*
  - Text Answer *(on page 98)*
  - Scan *(on page 96)*
  - Hyperlink *(on page 99)*
  - Signature *(on page 120)*
  - Slider *(on page 100)*
  - Date Range *(on page 101)*
  - Instructions *(on page 96)*
  - Number *(on page 102)*
    - Number with the Unit of Measurement *(on page 103)*
    - Number Range and Exceptions *(on page 104)*
    - Popup Message based on Number Range *(on page 107)*
  - Date and Time *(on page 110)*
  - Checkbox *(on page 111)*
  - Attachment *(on page 112)*
  - Geo Location *(on page 113)*
  - Multiple Choice *(on page 114)*
  - Global Picklist *(on page 116)*
  - Conditional Logic *(on page 120)*

3.2.1.1. Scan

Scan response type helps to scan and inspect the correct asset, which minimizes human error when capturing information and saves time with accurate and quick data entry.

For example, the operator or technician scans the valve tag **PZV-55011** to ensure the correct valve is inspected.

To add scan response type:

1. Enter a task or question as Scan the control valve tag to verify the correct equipment.
2. Select the **Scan** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.

3.2.1.2. Instructions

Instructions response type is used to provide detailed instructions or guidelines to the operator or technician, ensuring they follow safety protocols before performing the task.

For example, The operator or technician reviews instructions such as, "Ensure all safety equipment is worn before handling the valve."

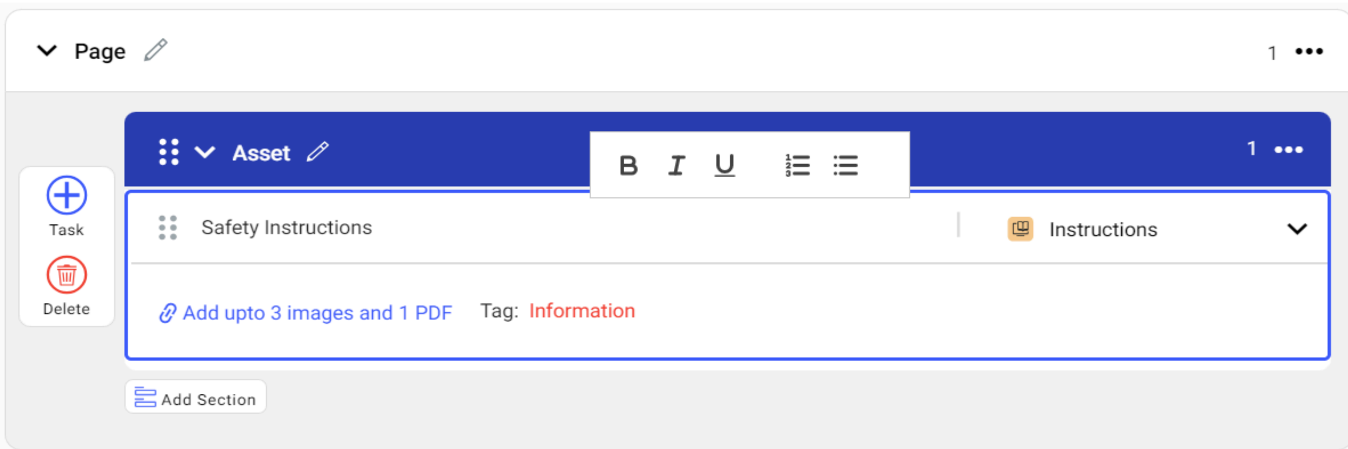
To add instructions response type:

1. Enter a task or question as Review safety guidelines before beginning valve inspection.
2. Select the **Instructions** value from the **Responses** drop-down.

   You can format the instructions by selecting the Bold (**B**), Italic (*I*), Underline (U), numbering list, and bullet list.

3. Click the link to add instructions links such as images or PDF links.
4. Select the relevant tag such as **Warning**, **Caution**, or **Danger** from the **Tag** drop-down.

Figure 3-8 Instructions Response Type



3.2.1.3. Read Only Field

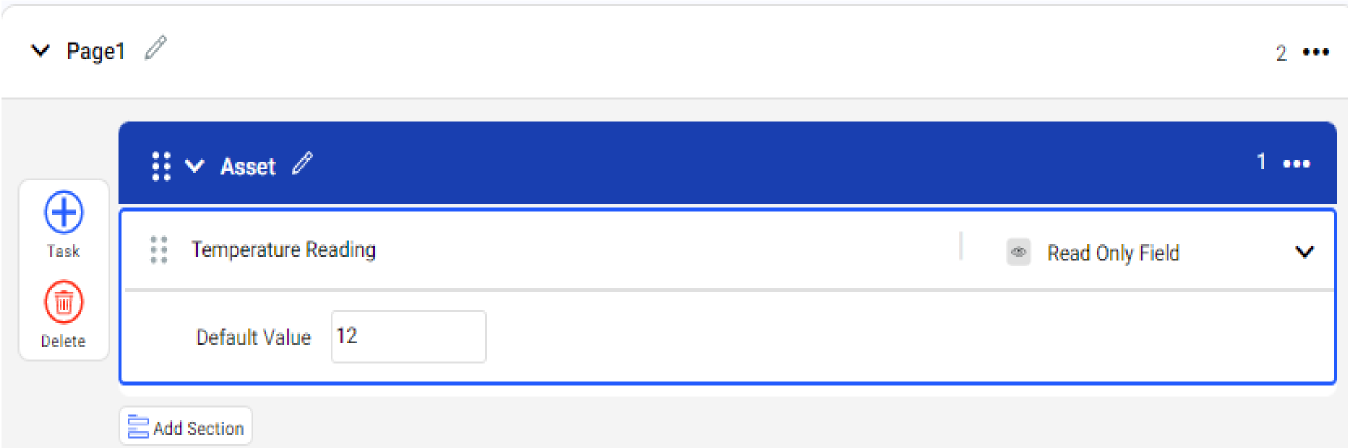
Read Only field response type is used in asset maintenance checks or inspections to display important information and prevent accidental changes to critical data. This response type is disabled for editing.

For example, Temperature threshold on a boiler unit.

To add read only field response type:

1. Enter a task or question as the Temperature threshold on a boiler unit.
2. Select the **Read Only Field** value from the **Responses** drop-down.
3. Enter the value in the **Default Value** field. For example, 12.

Figure 3-9 Read Only Response Type



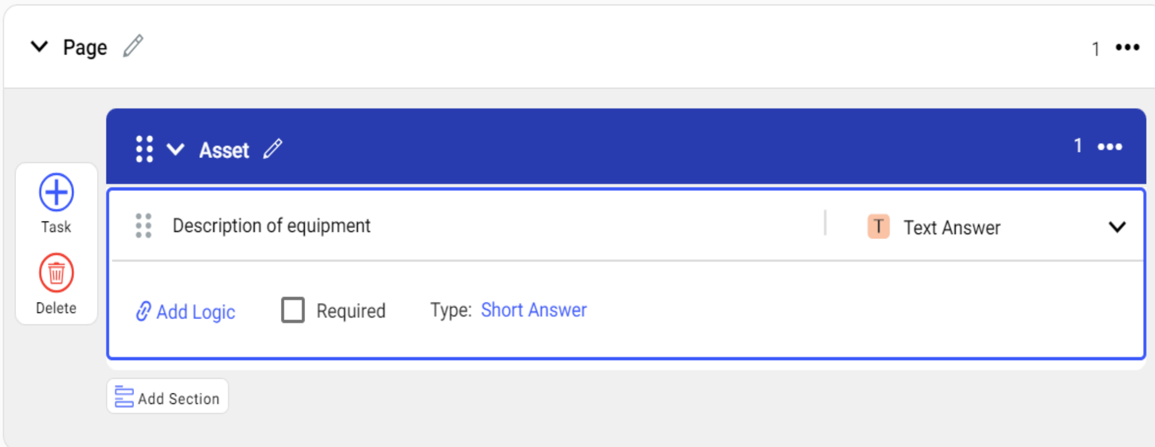
3.2.1.4. Text Answer

Text Answer response type is used to provide a detailed response if any malfunctions are observed. Text answers are used when a simple "yes" or "no" response isn't sufficient.

For example, the operator or technician answers: "No visible leaks detected."

To add text answer response type:

1. Enter a task or question as Are there any visible leaks on the control valve?.
2. Select the **Text Answer** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 120)*.
4. Select the **Required** check box if the value is required.
5. Select the **Type** as **Short Answer** or **Long Answer**.



6. Click **None** in the **Additional Details** field.
7. In the **Additional Details** window,
    a. Add tags in the **Tags** field.
    b. **Add attributes Label and Value.**
    c. Enable **Character Limit**.
    d. Add minimum and maximum character limits to restrict the entered character length.
    e. Click **Done**.

3.2.1.5. Hyperlink

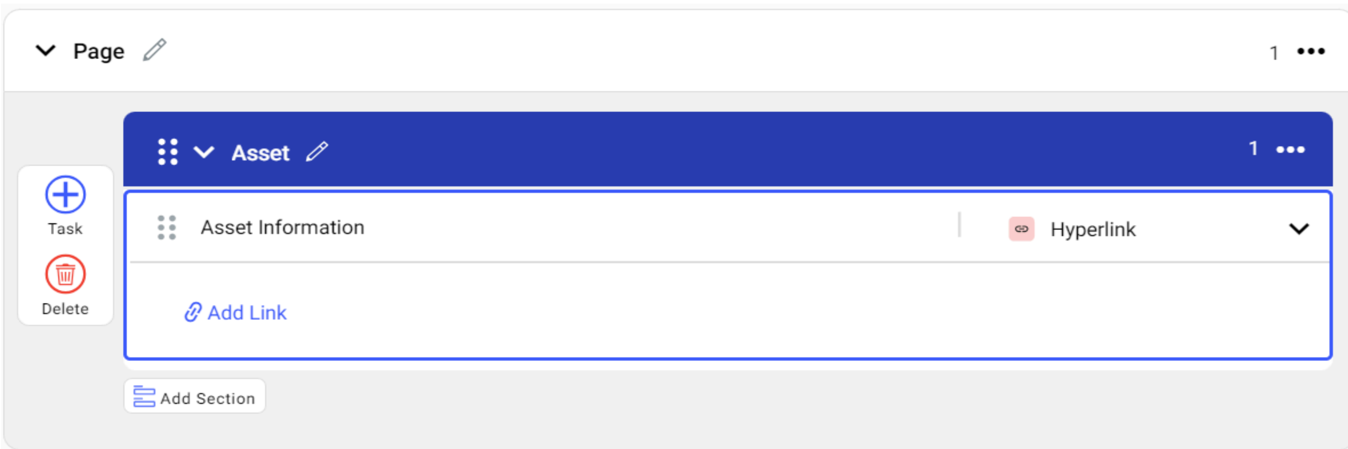
Hyperlink response type is use to link to external documents, such as user manuals or safety sheets.

For example, the operator or technician includes a hyperlink to the valve's **Maintenance Manual**.

To add hyperlink response type:

1. Enter a task or question as Attach additional documentation for the control valve.
2. Select the **Hyperlink** value from the **Responses** drop-down.
3. Click **Add Link**.
4. In the **Hyperlink** window, enter the **Title** and **URL** and click **Apply**.
   The link is added to the question.

Figure 3-10 Hyperlink Response Type



3.2.1.6. Slider

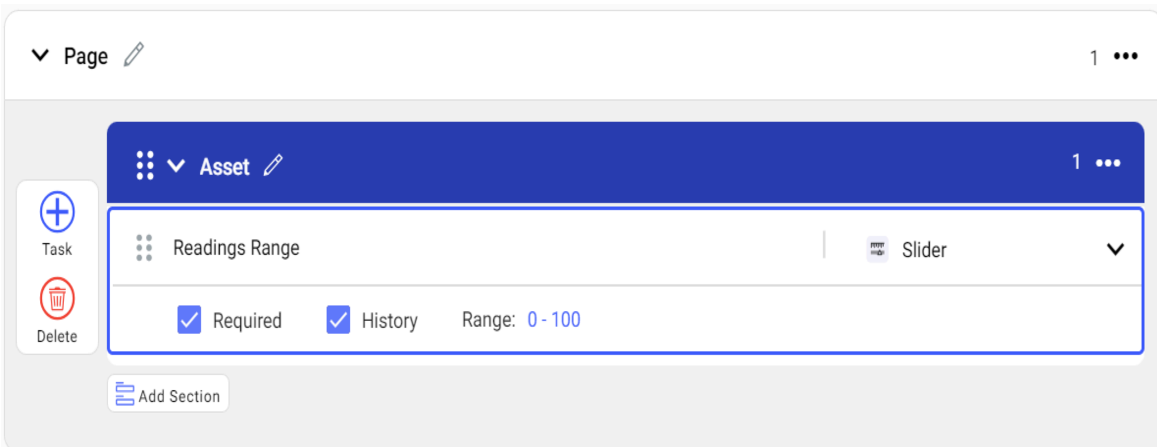
Slider response type is used to select a value from a continuous range for equipment performance parameters.

For example, the operator or technician sets the slider to **35°C**.

To add slider response type:

1. Enter a task or question as Set the valve operation temperature within the range of -10°C to 50°C.
2. Select the **Slider** value from the **Responses** drop-down.
3. In the **Slider** window, enter the **Range** which appears on the right side and click **Apply**.
4. Select the **Required** checkbox if the value is required.
5. Select the **History** checkbox and enter the number of readings (for example, between 0 and 20) to configure the display of the readings in the mobile application.

> **Note:**
> The History functionality only applies to mRounds, not mInspections.



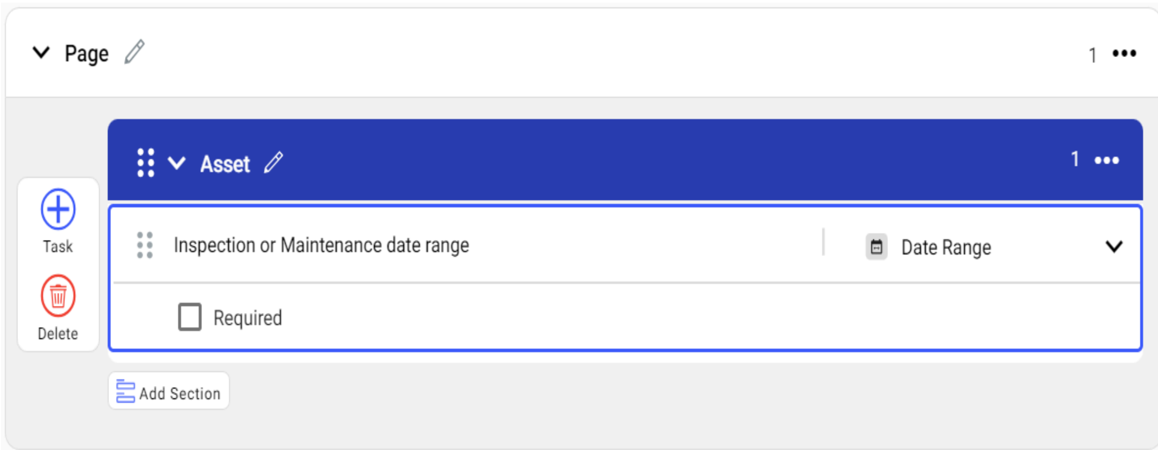
3.2.1.7. Date Range

Date Range response type is used to add date range of particular action or item.

For example, inspection date range.

To add date range response type:

1. Enter a task or question as an Inspection or Maintenance date range.
2. Select the **Date Range** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.



3.2.1.8. Number

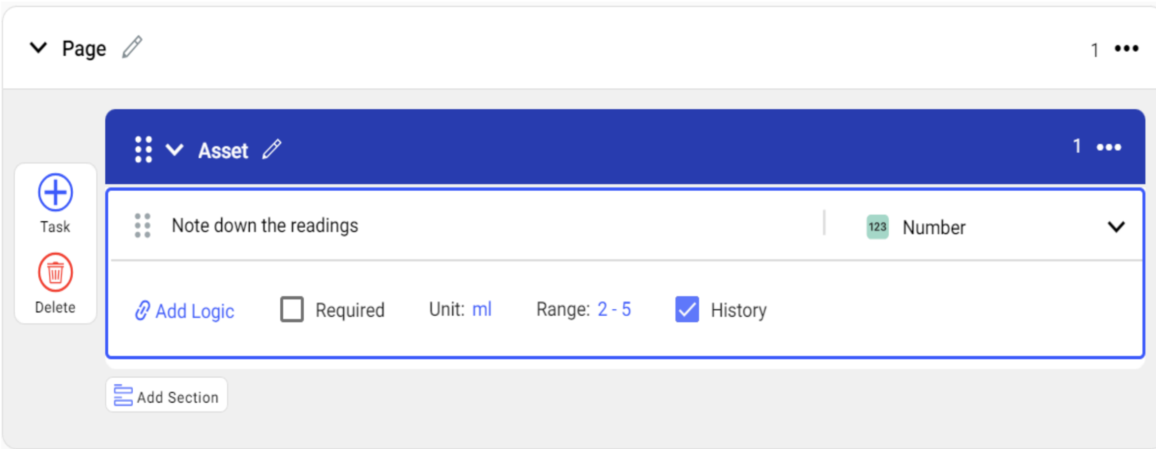
Number response type is used to capture numerical data, such as pressure, temperature, or other measurable values. You can configure the response type to view the historical data of unit and range values and enter decimal and negative values when filling tasks that have a number response type.

For example, the operator or technician enters the pressure reading: **120 PSI**.

To add number response type:

1. Enter a task or question as Record the pressure reading from the valve gauge.
2. Select the **Number** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 120)*.
4. Select the **Required** check box if the value is required.
5. Select the relevant **Unit** like meter (m), centimeter (cm), liter (l), Celsius (°C), and so on. For more information, see Number with the Unit of Measurement *(on page 103)*.
6. Select the **Range** for the selected Unit. For more information, see Number Range and Exceptions *(on page 104)*.
7. Select the **History** check box and enter the number of readings (for example, between 0 and 20) to configure the display of readings in the mobile application.

Note:
The History functionality only applies to mRounds, not mInspections.



8. Click **None** in the **Additional Details** field.
9. In the **Additional Details** window,
    a. Add tags in the **Tags** field.
    b. Add attributes **Label** and **Value**.
    c. Enable **Character Limit**.
    d. Add minimum and maximum character limit to restrict the entered character limit or length.
    e. Click **Done**.

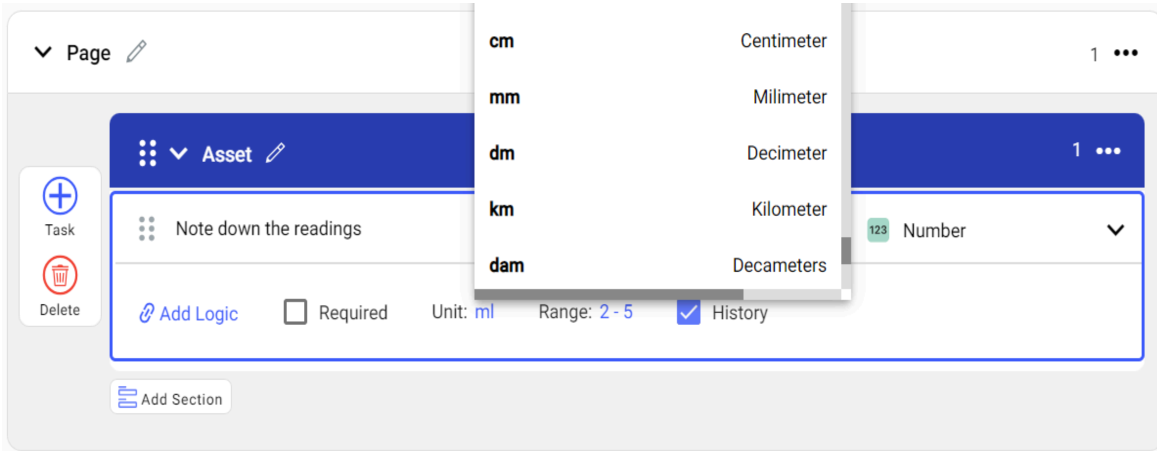
3.2.1.8.1. Number with the Unit of Measurement

Unit option in Number response type is used to ensure the recorded value falls within an acceptable threshold. If the value is outside the range, an alert can be raised.

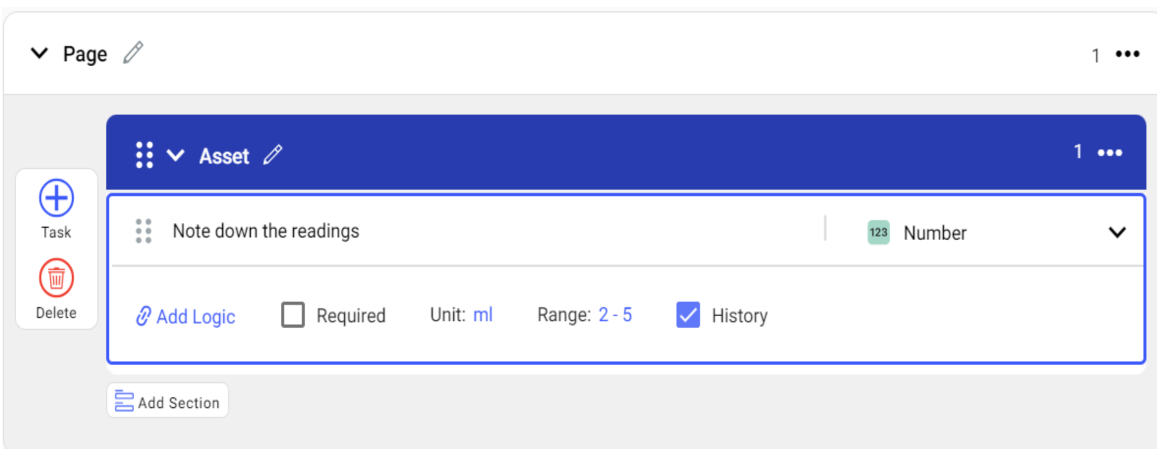
For example, the operator or technician records **85°C**, which is within the acceptable range.

To add unit value:

1. Enter a task or question as Is the valve temperature within the specified range (50°C - 100°C)?.
2. Select the **Number** value from the **Responses** drop-down.
3. Click the **Unit** link.
4. Select the required **Unit** like meter (m), centimeter (cm), liter (l), Celsius (°C), and so on from the drop-down.



5. Select the **Range** for the selected Unit. For more information, see Number Range and Exceptions *(on page 104)*.
6. Select the **Required** check box if the value is required.



3.2.1.8.2. Number Range and Exceptions

Range option in the Number response type is used to add a number range of a particular action or item. If the response is outside a specified range, this feature triggers a popup message to alert the operator or technician of a potential issue.

For example, the operator enters **105°C** (above the limit), triggering a popup: "Warning: Actuator temperature exceeds safe operating range."

To add range value and add exceptions:

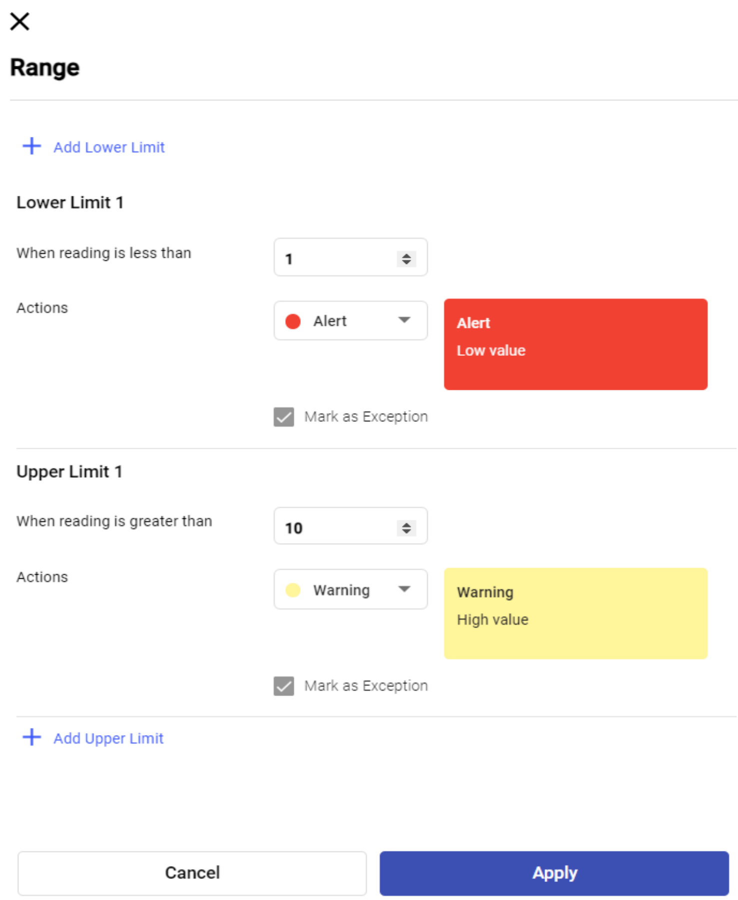
1. Enter a task or question as Does the valve actuator function within the specified range?.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the relevant **Unit** like Celsius (^{o}C) for the temperature. For more information, see Number with the Unit of Measurement *(on page 103)*.
5. Click the **Range** link and add range values for the selected Unit.
6. In the **Range** window,

a. Select **Lower Limit** and **Upper Limit** values.
b. Click **Add Lower Limit** and **Add Upper Limit** to add multiple lower and upper limit values.
c. Select the exception from the **Actions** list like **Warning**, **Alert**, **Note** and so on.

> **Note:**
> Click **Add New** in the list to add a new exception and select the color.

d. Enter relevant message for the selected exception. This message displays along with color code when the round is executed.

Figure 3-11 Number Range



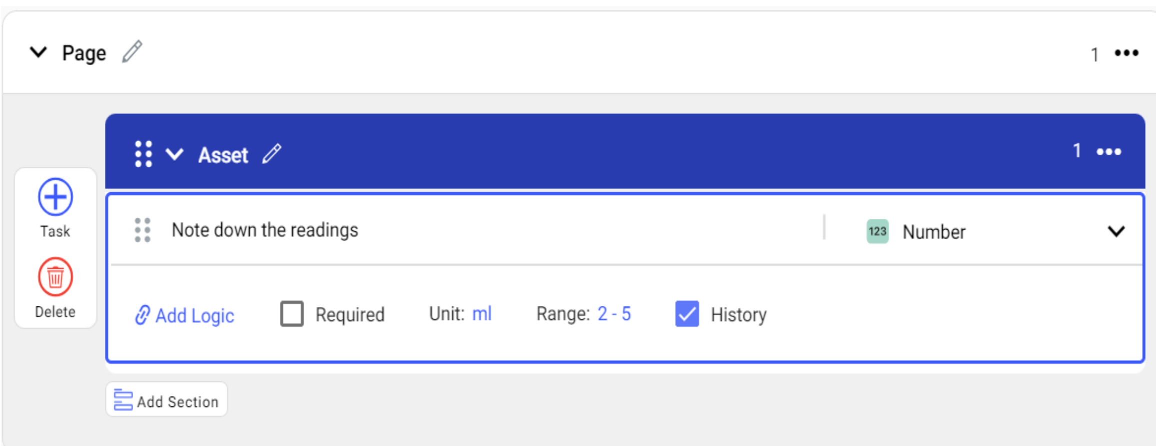
7. Click **Apply**.

3.2.1.8.3. Popup Message based on Number Range

Popup Message based on Number Range option in Number response type is used to add a number range of a particular action or item. You can enter the reading and provide justification in case the reading is higher/lower than the mentioned limit. For example, reading range.

To add a popup message based on number range response type:

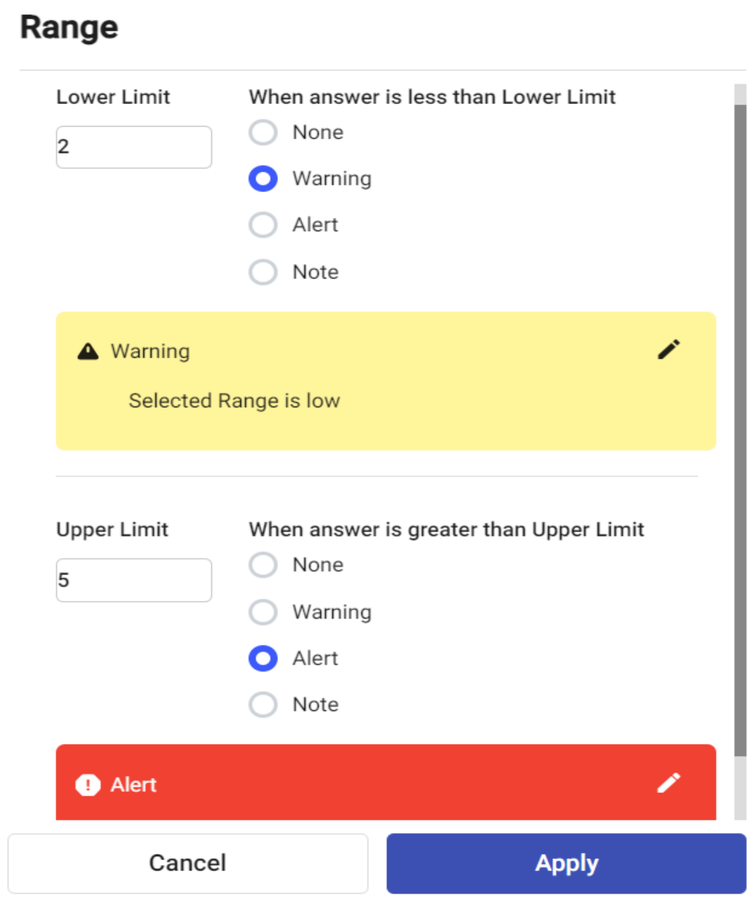
1. Enter a question as Note down the readings.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the relevant **Unit** like Celsius (^{o}C) for the temperature. For more information, see Number with the Unit of Measurement *(on page 103)*.
5. Select the **Range** for the selected Unit. For more information, see Number Range and Exceptions *(on page 104)*.



6. In the **Range** window, select **Lower Limit** and **Upper Limit** values.

7. Select the relevant message type radio button from the list to notify like Warning, Alert, Note etc. For example, to show the warning or alert message when the temperature is lower or higher than the selected range.
8. Enter the message to be displayed.

Figure 3-12 Popup Message



9. Click **Apply**.

3.2.1.8.4. Add Formulas to fields

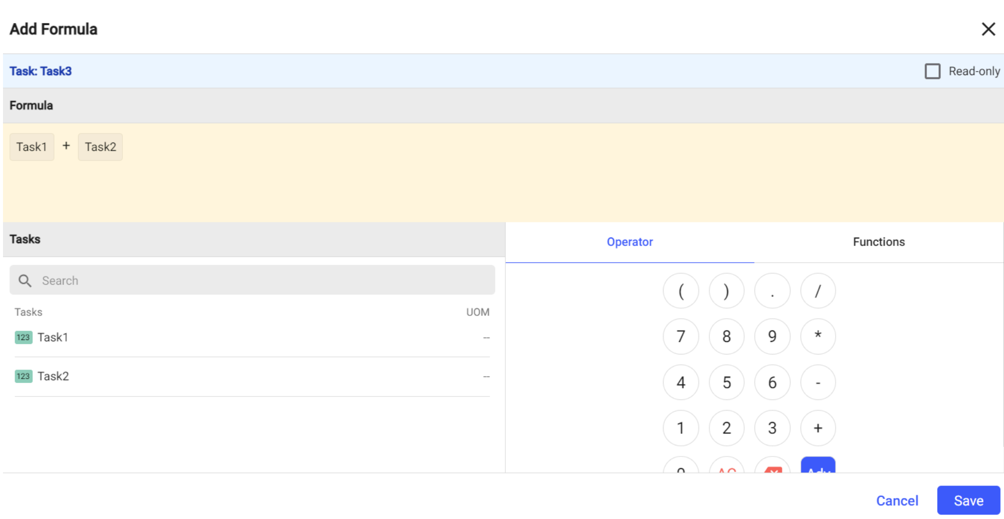
Formula in Number response type is used to automatically calculate values based on inputs from other fields. This is particularly useful for maintenance metrics like efficiency, operational performance, or usage calculations.

For example, a formula calculates the valve efficiency by dividing the valve output by the input, using previously recorded values such as flow rate and pressure.

To add a formula to field:

1. Enter a task or question as Calculate Valve Efficiency.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the **Unit**. For example, meter (m), centimeter (cm), liter (l), Celsius ($^{\circ}$C), and so on. For more information, see Number with the Unit of Measurement *(on page 103)*.
5. Select the **History** check box and add readings.
6. Click the **Formula** link.
7. In the **Add Formula** editor, add calculations and click **Save**.

Figure 3-13 Add Formula

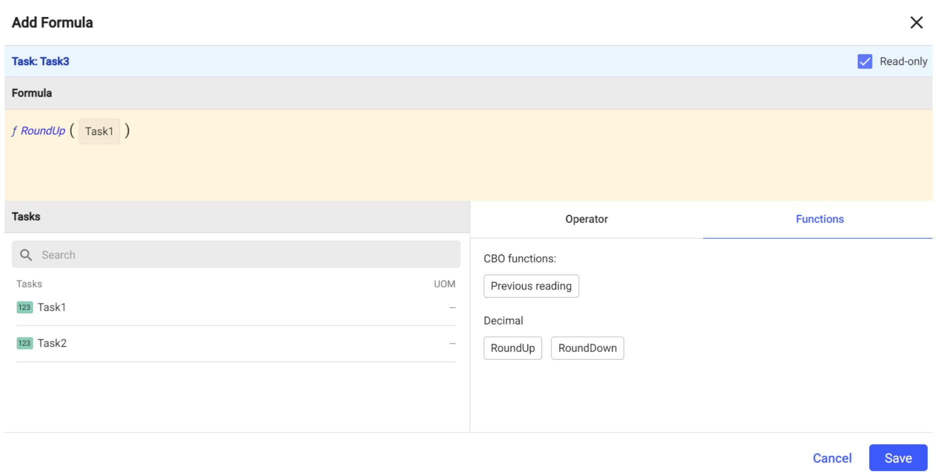


The configured formula is applied to the respective field and the calculated values are updated dynamically.

In this editor, you can,

- View the list of tasks or questions and use them to add formulas.
- Click the **Operator** tab to select simple mathematical operations such as Addition, Subtraction, Multiplication, Division, Exponentiation, and so on.
- Click **Adv** to see the advanced options such as π, e, x y, √, & %.
- Click the **Functions** tab to select complex mathematical functions such as RoundUp, RoundDown, and so on.

Figure 3-14 Add complex formula



- Use the previous readings (history) of the field in the formula and make the field read-only by selecting **Read-only** on the top right.

3.2.1.9. Date and Time

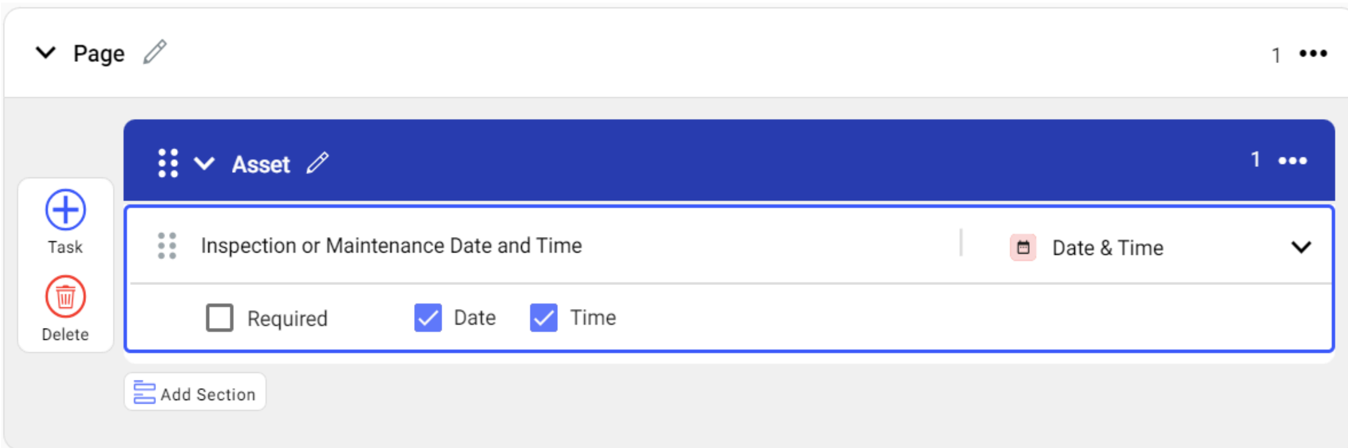
Date and Time response type is used to set future service dates or deadlines.

For example, the operator or technician selects **October 15, 2024, 10:00 AM**.

To add date and time response type:

1. Enter a task or question as Schedule the next maintenance for the valve.
2. Select the **Date and Time** value from the **Responses** drop-down.
3. Select the **Date** or **Time** checkbox.
4. Select the **Required** check box if the value is required.

Figure 3-15 Date and Time Response Type



3.2.1.10. Checkbox

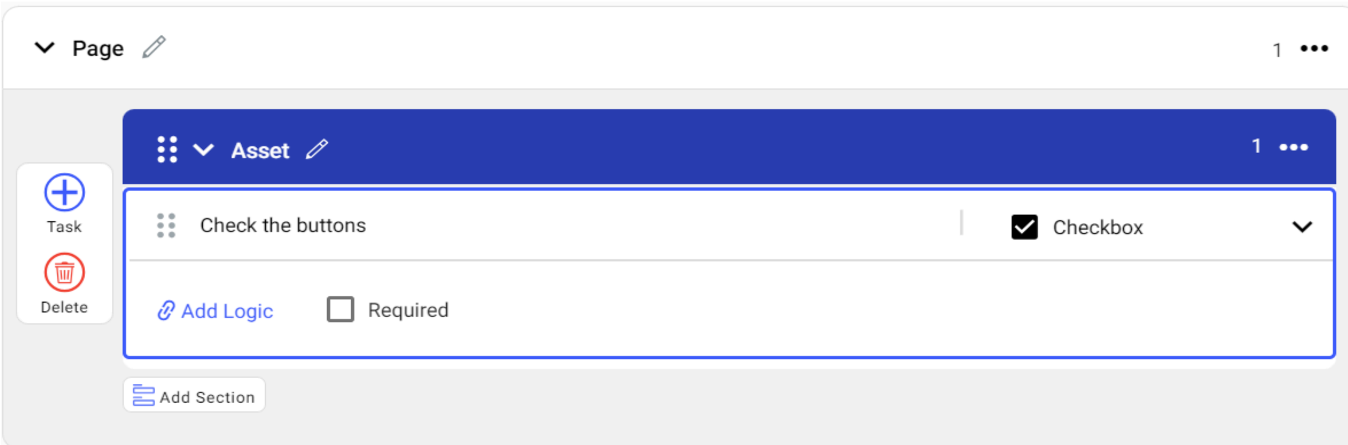
Checkbox response type is used to check off tasks as they are completed.

For example, the operator or technician checks the box to indicate that the valve inspection is done.

To add check-box response type:

1. Enter a task or question as Confirm that the valve inspection is complete.
2. Select the **Checkbox** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 120)*.
4. Select the **Required** check box if the value is required.

Figure 3-16 Checkbox Response Type



3.2.1.11. Attachment

Attachment response type is used to upload files, such as photos or PDFs, to provide additional context.

For example, the operator or technician uploads a photo of the valve showing no visible damage.

To add photo response type:

1. Enter a task or question as Attach an image of the valve inspection.
2. Select the **Attachment** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.

Figure 3-17 Photo Response Type

3.2.1.12. Geo Location

Geo Location response type is used to add equipment or asset location, which ensures the operator or technician is physically at the right location for the equipment inspection, preventing remote or incorrect inspections.

For example, the operator's or technician's location is captured to confirm they are at **Tower 2, Plant 1000**.

To add Geo Location response type:

1. Enter a task or question as Confirm the control valve's location.
2. Select the **Geo Location** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.

Figure 3-18 Geo Location Response Type

3.2.1.13. Multiple Choice

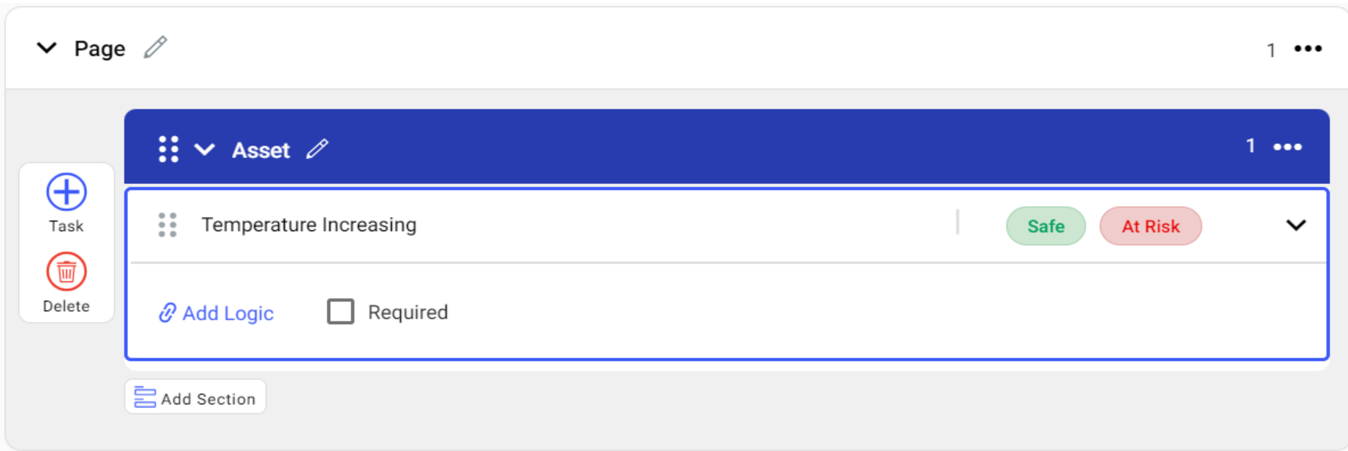
Multiple Choice is used to select predefined conditions for the equipment quickly.

For example, the operator or technician can select pre-defined option for asset condition such as, Good, Needs Repair, or Needs Replacement.

To add multiple choice response type:

1. Enter a task or question as What is the condition of the control valve?.
2. Click the **Responses** drop-down and click the **Picklist** tab in the **Choose Responses** window.
3. Select the value in the **Multiple Choice** section. For example, Safe and At Risk.

Figure 3-19 Multi Choice Response Type

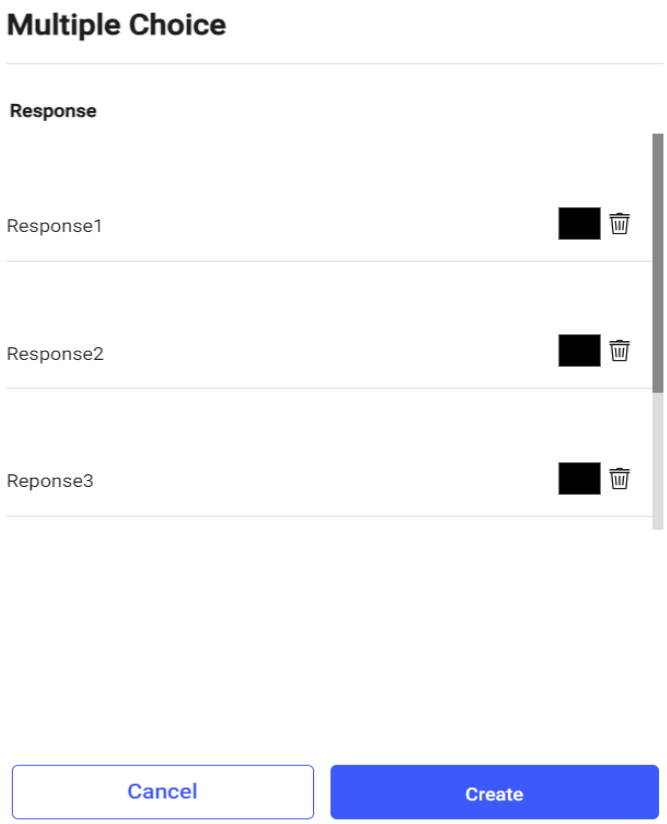


4. Click **Add More** if the required choice is not in the list.

Figure 3-20 Multiple Choice Add More

5. In the Multiple Choice window, click **Add Response** and add choices.

Figure 3-21 Add Multiple Choice Values



6. Click **Create**.

   The newly created multiple responses are displayed in the Multiple Choice section.

3.2.1.14. Global Picklist

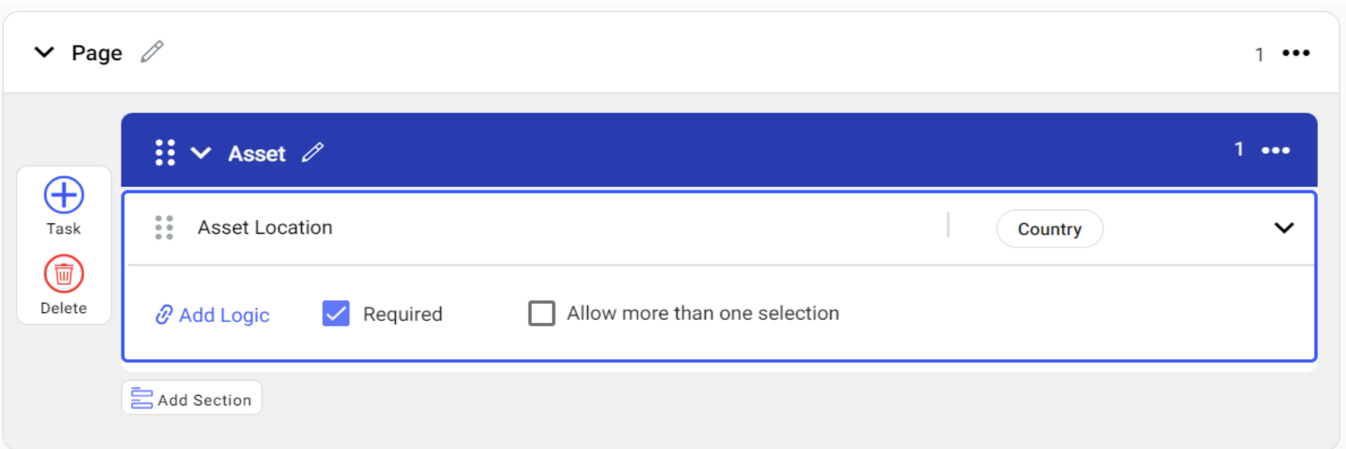
Global Picklist response type provides standardized lists that can be reused across different forms, ensuring consistent data entry such as, a list of manufacturers or equipment types.

For example, the operator or technician selects the valve manufacturer from a predefined list of vendors like **Vendor A**, **Vendor B**, or **Vendor C**.

To add global pick list response type:

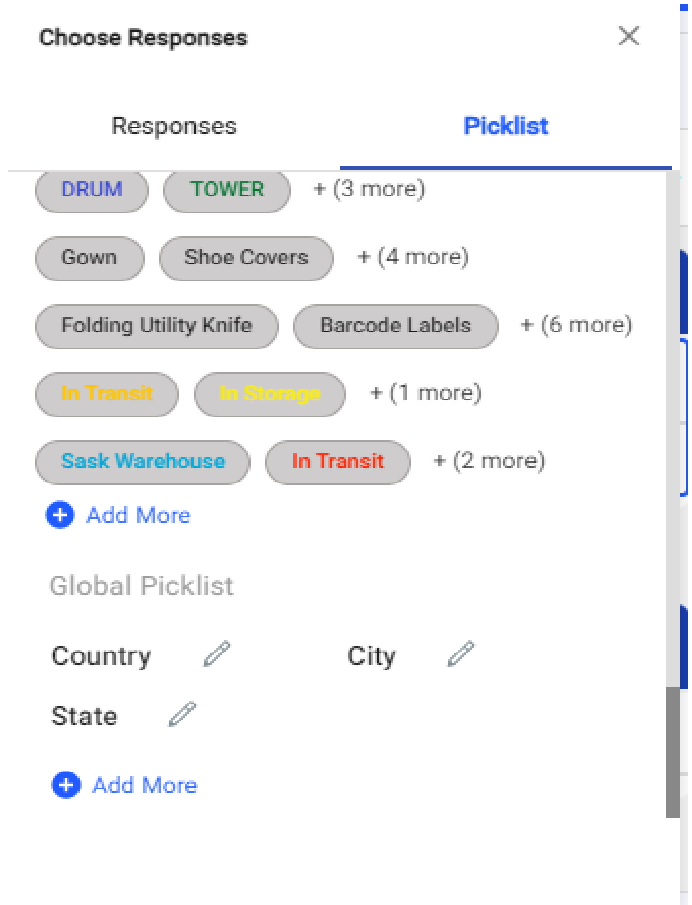
1. Enter a task or question as Select Valve Manufacturer.
2. Click the **Responses** drop-down and click the **Picklist** tab in the **Choose Responses** window.
3. Select the value in the **Global Picklist** section. For example, Country.
4. Click **Add More** in the Global Picklist section, if the required choice is not in the list.

Figure 3-22 Global Picklist Response Type



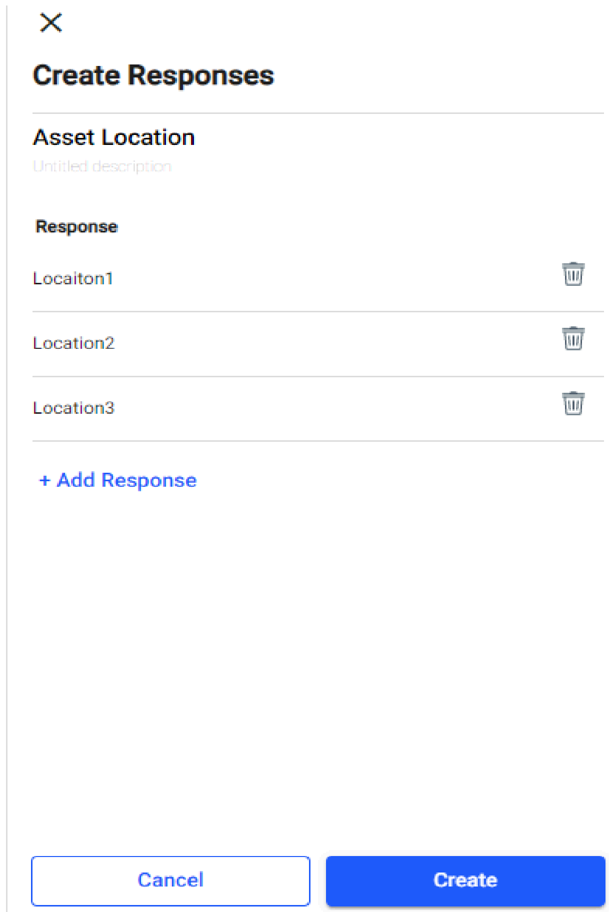
5. Click **Add More** if the required response is not in the list.

Figure 3-23 Global Picklist



6. In the **Create Responses** window, add response title, and click **Add Response** to add responses list. For example, add title as Asset Location and add responses such as locations list.

Figure 3-24 Global Picklist Add More



7. Click **Create**.

   The response set is created and displayed in the Global Picklist section.

3.2.1.15. User

User response type is used to display the current user when a user adds the form to the work order in the mWorkOrder mobile application.

> **Note:**
> This response type is applicable only for Embedded Forms.

To add User response type:

1. Enter a question as User.
2. Select the **User** value from the **Responses** drop-down
3. Select the **Required** check box if the value is required.

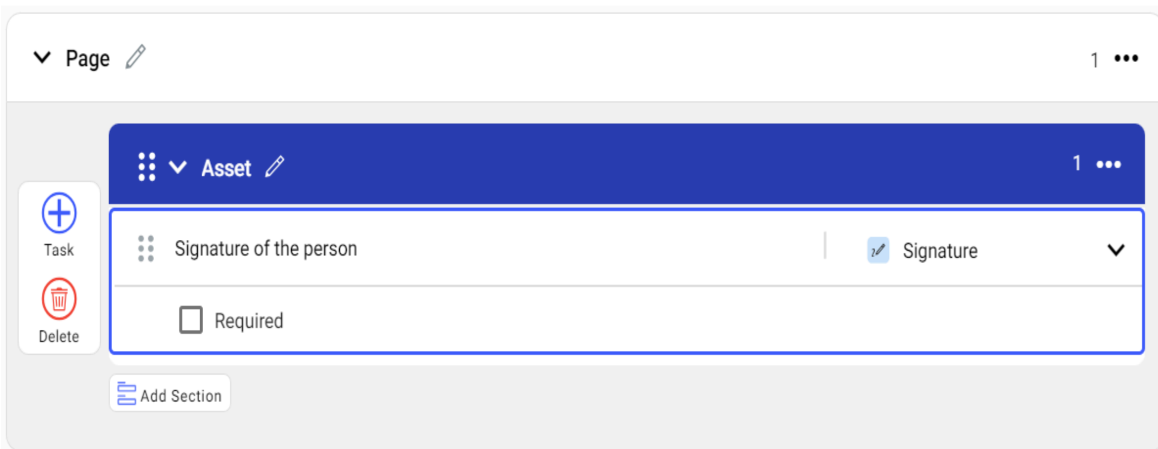
3.2.1.16. Signature

Signature response type is used for authentication and to confirm task completion.

For example, the operator or technician signs off on the inspection.

To add signature response type:

1. Enter a task or question as Provide your signature to confirm the completion of the inspection.
2. Select the **Signature** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.



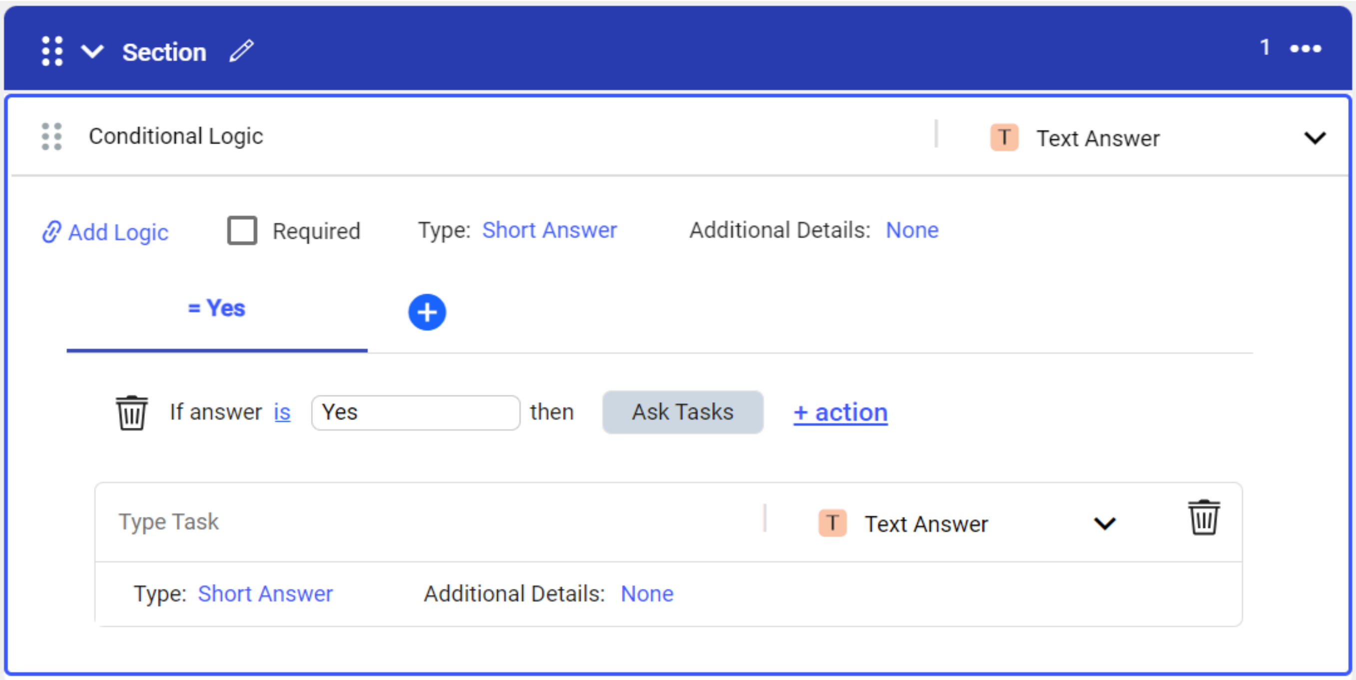
3.2.1.17. Conditional Logic

Conditional logic in mRounds allows you to create dynamic tasks that adjust based on operator or technician responses.

By applying conditions, you can trigger follow-up actions, hide irrelevant tasks, or raise issues automatically. This helps streamline workflows and ensures that operators focus only on the tasks that matter based on real-time inputs.

You can add logic for the following response types.

- **Text Answer**: When you select this response, the screen displays the logic question “if answer **is** or **is not** <Yes or No> then”, click the **+action** button to select the following options:
    - **Mandate Tasks/Questions**: This option is used for the task or question that has a dependent task or question. For example, **Is the equipment in good condition (Yes/No)?** Depending on the answer you can mandate the user to fill in additional information.
    - **Hide Tasks/Questions**: This option is used to hide the tasks or questions if they are no longer required.
    - **Ask Tasks/Questions**: This option is used to add dependent or sub tasks/ questions to the main task/question. For example, What is the temperature of the equipment? If the answer is more than 100 degrees centigrade then ask additional tasks/questions like take pressure reading of the equipment. The sub tasks/questions also have the attributes like Add Logic, Required, Unit, Range, History, and Additional Details, if the response type is a Number or Text Answer.
    - **Hide Section**: This option is used to hide the sections based on the conditional logic to control the data visibility according to the selected response.
    - **Ask Evidence**: This option is used to add images or attachments for evidence.
    - **Raise Issue**: This option is used to raise an issue if any anomaly is found.
    - Click Add to add more logic to questions.
- **Number**: When you select this response, the screen displays the logic question “if answer **equal to** or **not equal to** or **greater than or equal to** or **greater than** or **less than** or **less than or equal to** <number> then”, click the **+action** button to select the above options.
- **Check box**: When you select this response, the screen displays the logic question “if answer **is** <**true**> or <**false**> then”, click the **+action** button to select the above options.



Add conditional logic: by following detailed example:

1. Add a task or question as Are there any visible leaks on the control valve?.
    a. Select **Text Answer** response type.
    b. Click **Add Logic**.
    c. Select **Yes** or **No** from the logic.
    d. Click **+action** and select **Ask Task/Question**. If the operator or technician answers **Yes**, trigger a follow-up task to upload a photo of the leak.
2. Add a task or question as Record the pressure reading from the valve.
    a. Select **Number** response type.
    b. Click **Add Logic**.
    c. Select **Yes** or **No** from the logic.
    d. Click **+action** and select **Raise Issue**. If the pressure reading is above **150 PSI**, trigger a warning message and follow-up task for the operator to report the issue.
3. Add a task or question as Is the actuator functioning properly?.
    a. Select **Multiple Choice** response type.
    b. Click **Add Logic**.
    c. Select **Yes** or **No** from the logic.
    d. Click **+action** and select **Ask Task/Question**. If the operator selects **No**, trigger a follow-up task to assign the actuator for repair.
4. Add a task or question as Have all tasks been completed?.

a. Select **Checkbox** response type.
b. Click **Add Logic**.
c. Select **Yes** or **No** from the logic.
d. Click **+action** and select **Raise Issue**. If the operator leaves this unchecked, flag the round as incomplete and notify the supervisor.

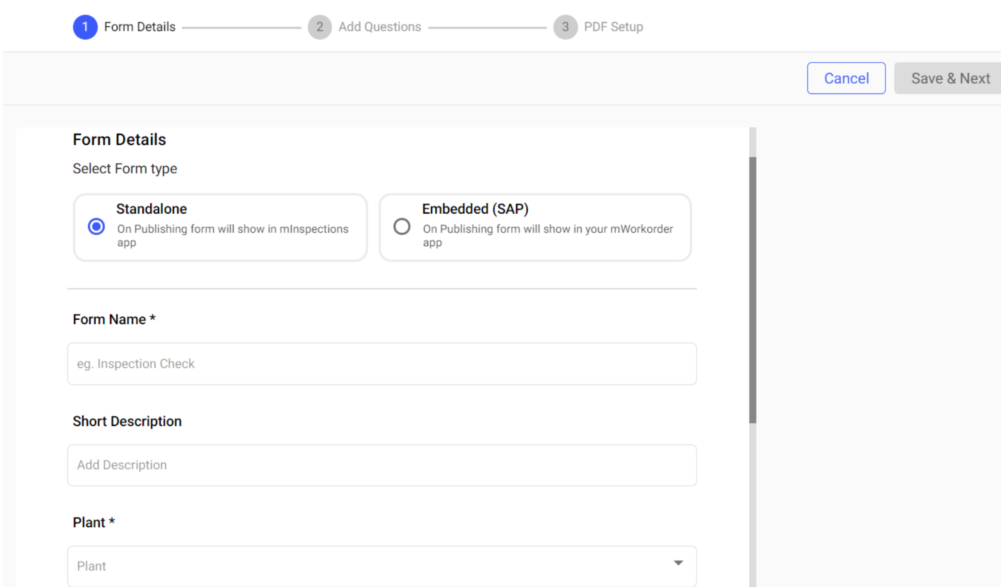
3.2.2. Create and Publish a Form

Create forms with pages, sections, and questions within sections, and publish them for asset maintenance.

To create a form:

1. Expand the **Forms** module and click **My Forms** on the left-side pane.
2. In the **My Forms** screen, click **Create New** and select **Create Manually** on the right side.
   or
   Click More icon > select **Download Excel Template**.
   Fill the details in the template.
   Click **Create New**, select **Upload Excel**, select excel files, and click **Upload**.
   The forms are uploaded, and you can see them in the Forms screen with Draft status.
   Open the form.
   The **Form Details** screen is displayed.

   Figure 3-25 Fill form details

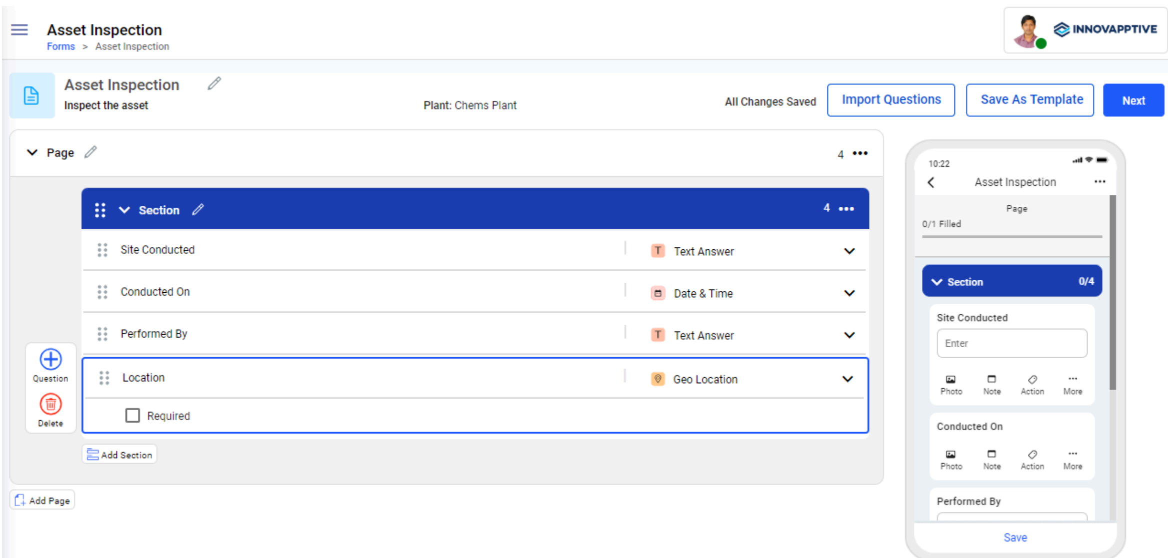
3. In the **Form Details** screen, fill in the following details.

Table 3-1 Form Details Screen Fields

Field	Description
Form Type	Select form type **Standalone** or **Embedded**. **Note:** If you select **Standalone**, the form is displayed in the **mInspections** application after publishing. If you select **Embedded**, the form is displayed in the **mWorkOrder** application after publishing.
Form Name	Enter a name to identify the form. For example, Equipment Inspection.
Short Description	Add a short description about the form.
Plant	Select the relevant plant from the drop-down.
Tags	Add relevant tags.
Notes and Attachments	Add attachments such as dos and don'ts, safety measure documents, etc. You can view additional notes and attachments such as safety instructions or manuals on the mobile application in offline mode and refer to them while executing the inspections in areas with poor or no network connectivity.
Zone	Select one or more zones from the list to execute the form within the selected zone by the technician.
Additional Details	Add additional details or fields. ◦ Click **Add**. ◦ Enter **Label** and **Value**. **Note:** You can add additional fields to provide situation-specific information that can be referenced by the technician in the mobile application. You can configure the label and values for

Field	Description
	these attributes, with a maximum of 25 characters for the label and 40 characters for the value. You can update and delete the field values at any time, even after inspections are created and scheduled.

4. Click **Save & Next**.



5. In the Create Form screen, create a form with multiple sections, add question and response types:

Note:

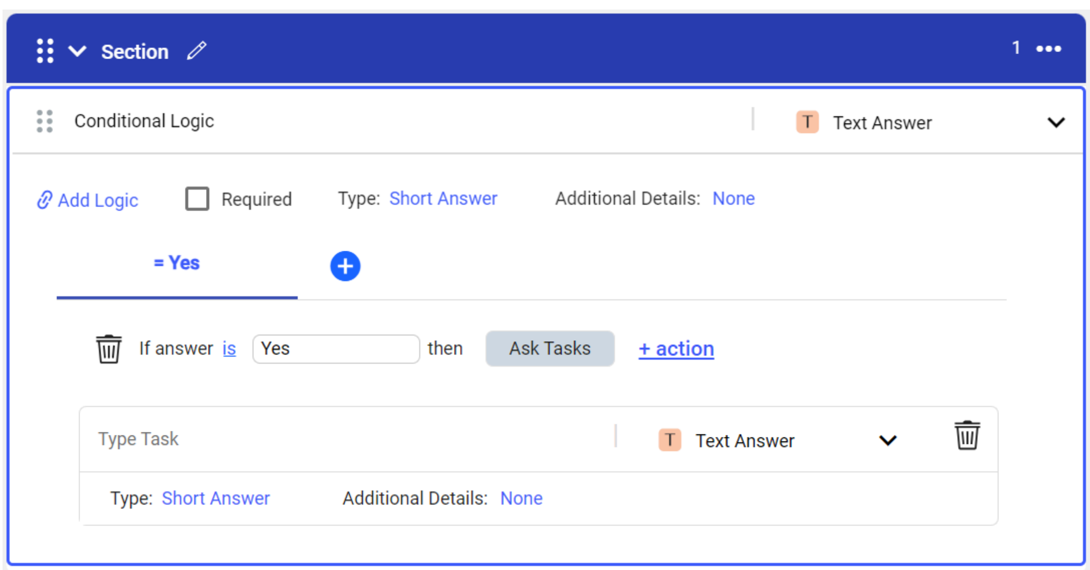
- To add multiple questions, click the **Question** button. When you click the button, the screen displays the following options,
    - **Type Question**: Enter the question in the text box.
    - **Responses**: Select the relevant response type from the drop-down. For information about each response type, see Pointers for creating an effective form *(on page 94)*.
    - **Add Logic**: Click **Add Logic** to create a logical question along with actions. This logical question is more likely of multiple-choice responses like Yes or No. For more information, see Conditional Logic *(on page 120)*.
    - **Required**: Select the check box to make the question mandatory to fill.
    - **Type**: Select or enter the values based on the selected Response type.
    - **History**: Select the check box to see the last five transactions. This option is available only for Number and Slider response types.
    - **Additional Details**: Click Add to add additional details for the question. In the Additional Details window, add Tags, and Attributes (Labels and Values).

      Note:
      Additional details provide situation-specific information that can be referenced by the technician in the mobile application. You can configure the label and values for these attributes with a maximum of 25 characters for the label and 40 characters for the value. You can update and delete the field values at any time, even after inspections are created and scheduled.

- You can cut, paste, copy the questions,
    - Right-click on the question > select **Cut** to cut the question.
    - Right-click on the question > select **Paste** to paste the question.
    - Right-click on the question > select **Copy Below** to copy the question below the current question.

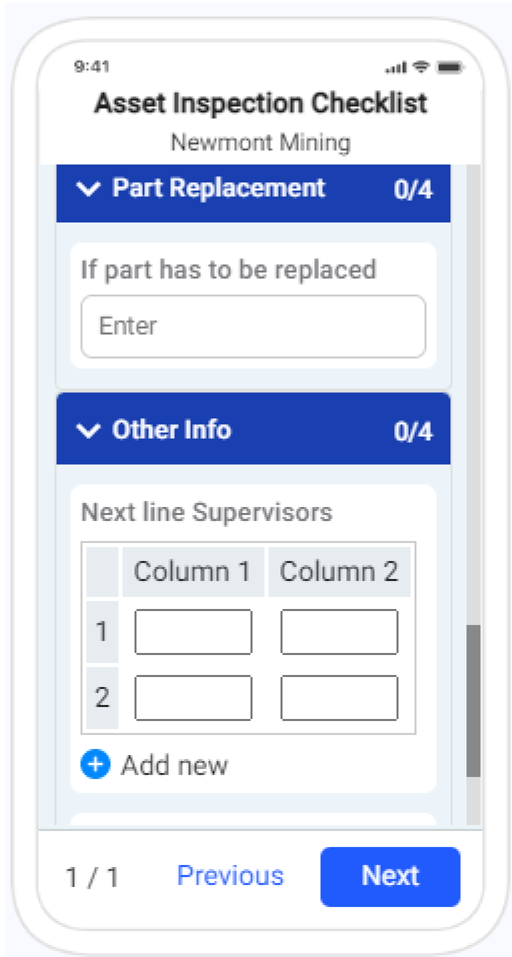
- To add more sections, click the **Add Section** button.
  - You can copy or delete the section by clicking the More icon on the right side of the section.
  - You can collapse & expand and drag & drop the sections.
- To add more pages, click the **Add Page** button.
  - You can delete the page by clicking the More icon on the right side of the page.

6. Take the following example to create a form,
   a. Add or update the title of the form with a short description. For example, Equipment Inspection.
   b. Add Section name inside the **Page 1**. For example, Inspection.
   c. Add questions under the section with different response types and conditional logics.
   d. Add logic to check whether the readings are correct.
      i. Enter the question as Asset is faulty?
      ii. Select the **Text Answer** value from the **Responses** drop-down next to the question.
      iii. Select the **Required** check box if the value is required.
      iv. Click **Add Logic**.
      v. Select **Yes** or **No** from the logic. If the answer is **Yes**, then you can select the **Mandate Questions** and then select the question **Check the Buttons** from the list to take necessary action.



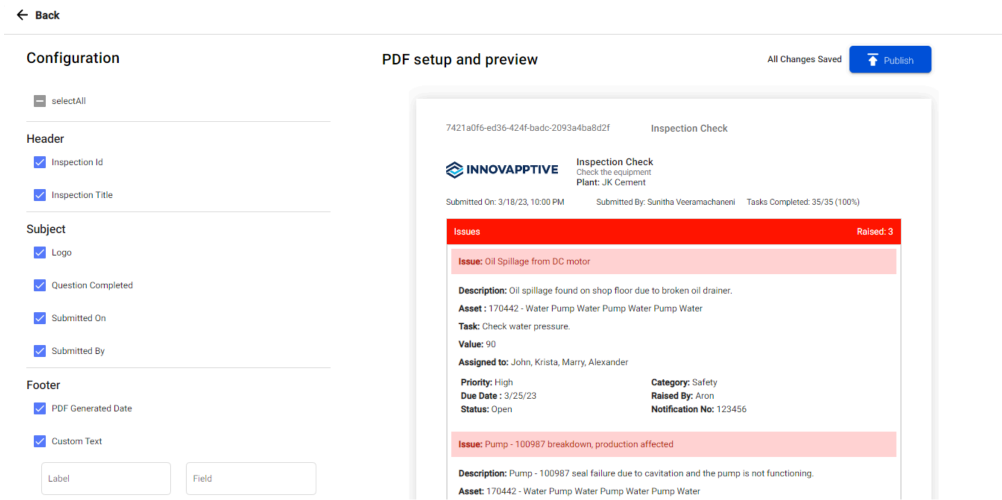
7. Click the **Preview** button to see the form preview.

You can see the preview of the form in the mobile application on the right side.



8. Click **Next** to view the preview in PDF format that generates once the inspection data is filled and submitted by the technician from the mInspections application.

Figure 3-26 Form in PDF Format



In the **PDF Setup** screen, you can configure the PDF as needed. For more information, see Configure Round Plan Details PDF *(on page 132)*.

9. Click **Publish**.

   The form is published, and you can see the published form in the **My Plans** screen with **Published** status and in the **Scheduler** screen with **Schedule** option.

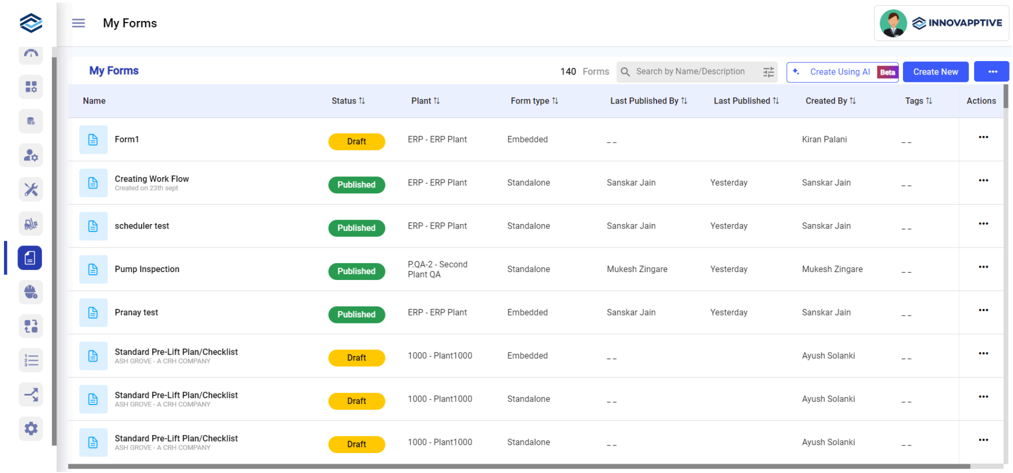
3.2.2.1. Create a Form using Generative AI

Create a customized form quickly using AI by giving prompts with additional attributes. This feature helps reducing time and effort required to create digital forms.

To create a form using AI:

1. In the **My Forms** screen, click **Create using AI** and select **Embedded** or **Standalone**.

Figure 3-27 My Forms Screen



Note:

If you select **Standalone**, the form is displayed in the **mInspections** application after publishing.

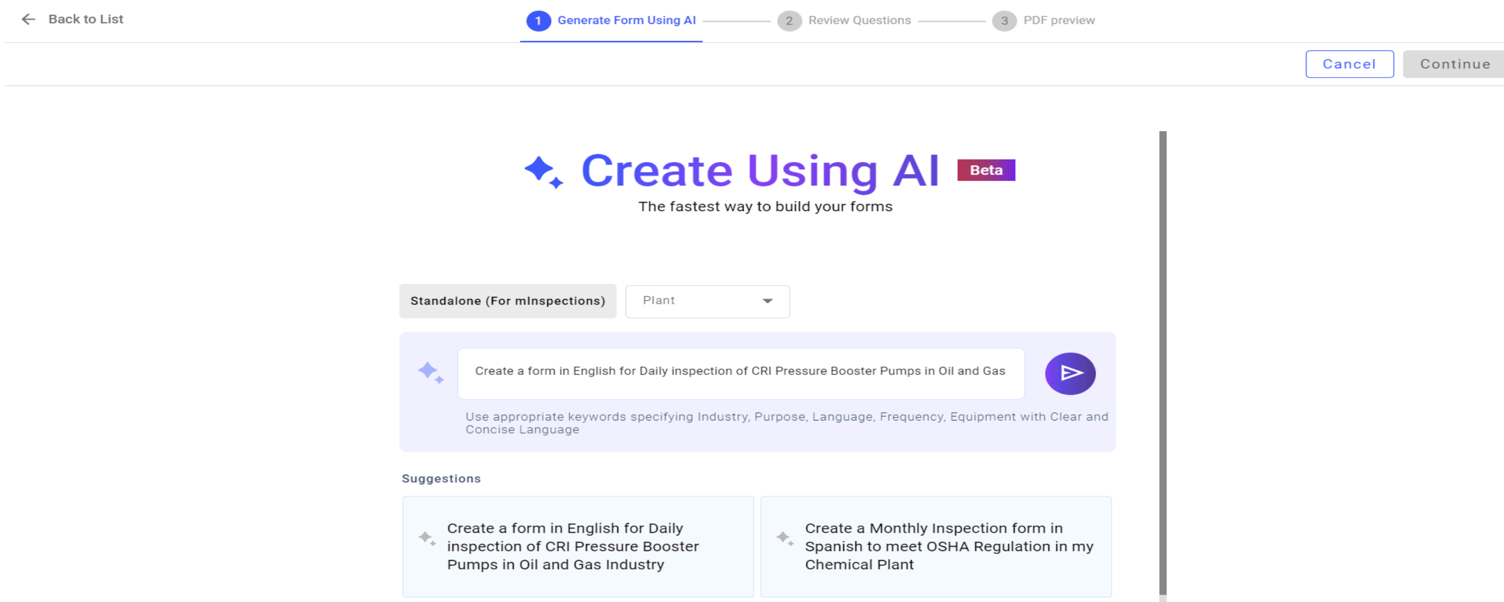
If you select **Embedded**, the form is displayed in the **mWorkOrder** application after publishing.

2. In the **Generate Form Using AI** screen, select the **Plant** from the list.
3. In the **Enter Prompt** text field, enter the prompt. For example, Create a form in **English** for **Daily Inspection** of **Pressure Booster Pumps** in **Oil and Gas** Industry.

   Or

   Choose from the suggestions in the list.
4. Click **Enter**.

Figure 3-28 Generate Form Using AI Screen

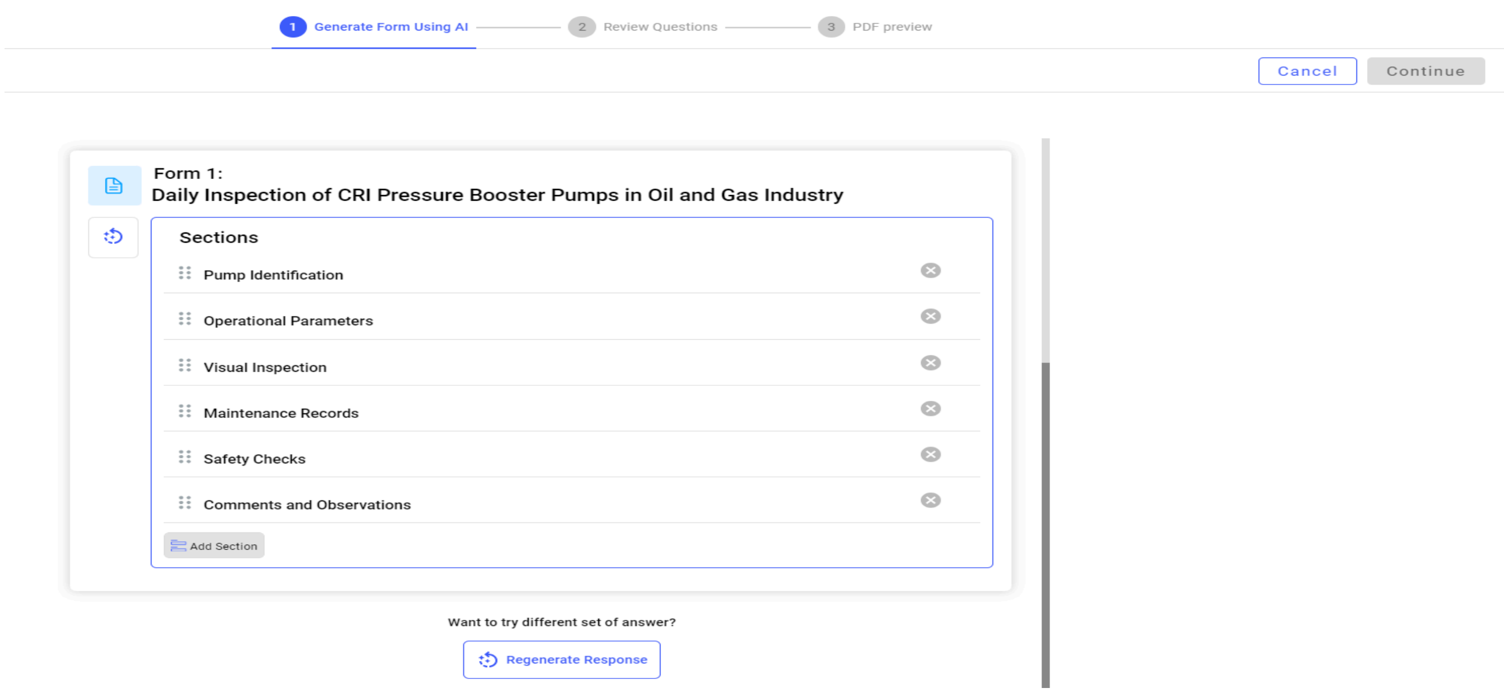


The form is generated with different sections.

Edit the generated sections or add more sections as required.

Tap **Regenerate Response** to regenerate the sections.

Figure 3-29 Generated Response



5. Click **Continue** on top right.

   The form is created with sections, questions and response types.

   Click **Regenerate Section** before each section if you want to regenerate the section.
6. In the **Review Questions** screen, review the questions.
7. Click **Next**.
8. In the **PDF Preview** screen, click **Publish**.

3.2.2.2. Configure Round Plan Details PDF

Configure the PDF on the left side pane to customize what information appears in the PDF reports generated from completed round plans such as attributes present in the Header, Subject, Summary Page, Footer, and Body Content sections. This ensures that the right data, such as task details, equipment status, and operator actions, are clearly presented in the final report.

You can view the following details in PDF (preview or downloaded):

- Round/Form Description
- Summary
  - Plant
  - Schedule
  - Shift
  - Due
  - Submitted On
  - Submitted By.
- Issues Summary
  - Issues Raised
  - Issues Resolved.
- Actions Summary
  - Actions Raised
  - Actions Resolved.
- Tasks Summary

    - Open
    - Skipped
    - Completed
    - Total
    - Tasks/Questions Completed By
    - Report Generated On
    - Total Pages.
- Tags for Priorities & Status of Issues & Actions.
- Description, Asset, Location & Priority of Issues & Actions highlighted.

> **Note:**
> Not applicable for inspections.

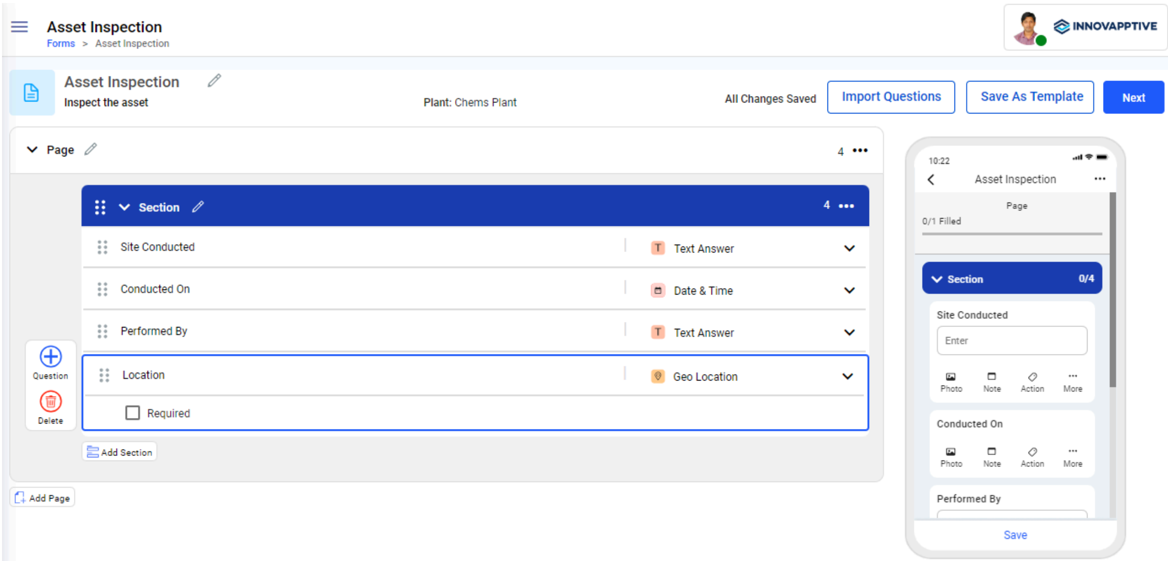
- The instruction response type text.
- Photos, Videos, Audios & PDFs attached as links.
- The previous five numeric histories.

3.2.2.3. Import Questions from Template

You can quickly add questions by importing pages, sections, and questions from existing forms.

To import pages, sections, or questions from the template:

1. In the **My Forms** screen, click **Create New** and select **Create Manually**.
   or
   Select the existing form and click **Edit Form** on the right-side window
2. In the **Form Details** screen, update the details like **Form Type**, **Form Name**, **Description**, **Plant**, **Tags**, **Notes and Attachments**, & **Additional Details**.
3. Click **Save & Next**.



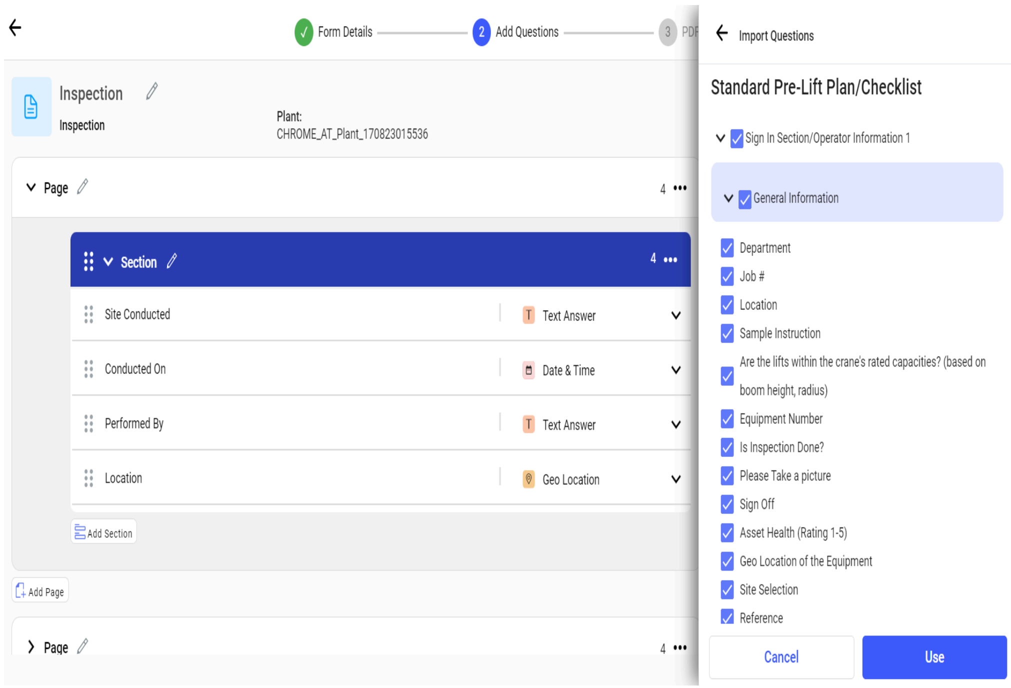
4. Click the **Import Questions** button.
5. In the **Import Form** window, click the **Forms** tab.

Figure 3-30 Import Questions Window

> **Note:**
> To import questions from the template, click the **Templates** tab. For more information, see Import Questions from Template *(on page 141)*.

6. Select the form from the list.
7. Select the whole page, whole section, or individual questions and click **Use**.

Figure 3-31 Import Questions



A pop-up with create a new page/section or import to the current page/section appears.

8. Select **Add as new page** or **Add to existing page** option.
9. Click **Import**.

   Questions imported successfully message appears.

3.2.2.4. Create Forms from Existing Forms

You can copy an existing form (duplicate) and create a new form instantly.

To copy an existing form and create a new form:

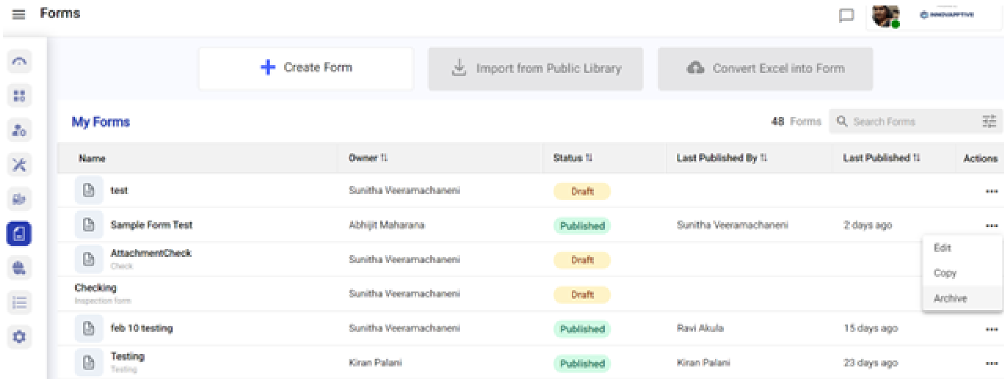
1. Click the **My Forms** section on the left-side pane.

   The **My Forms** screen with the list of draft and published forms is displayed.

2. Click the More ••• icon > **Copy** for the selected form.

   The copied form is displayed in the list with draft status.

Figure 3-32 Copy Form



3. Click on the copied form to view the details on the right-side window and click **Edit Form**.

   or

   Double-click the form to open the edit screen.

4. Update or modify the questions and other details as required and publish. For more information, see Edit forms and questions *(on page 136)*.

3.2.2.5. Edit forms and questions

As a Form Author, you edit forms to meet the new requirements of asset inspection. You can change the name of the form, description, edit and delete pages. You can also edit, drag drop, copy, and delete sections, and questions.

To edit a form:

1. Click the **My Forms** section on the left-side pane.

   The My Forms screen with the list of draft and published forms is displayed.

2. Click the More ••• icon > **Edit** for the selected form.
3. Update the form details as required.
4. Click **Publish** to re-publish the form.

3.2.2.6. Bulk Upload Forms

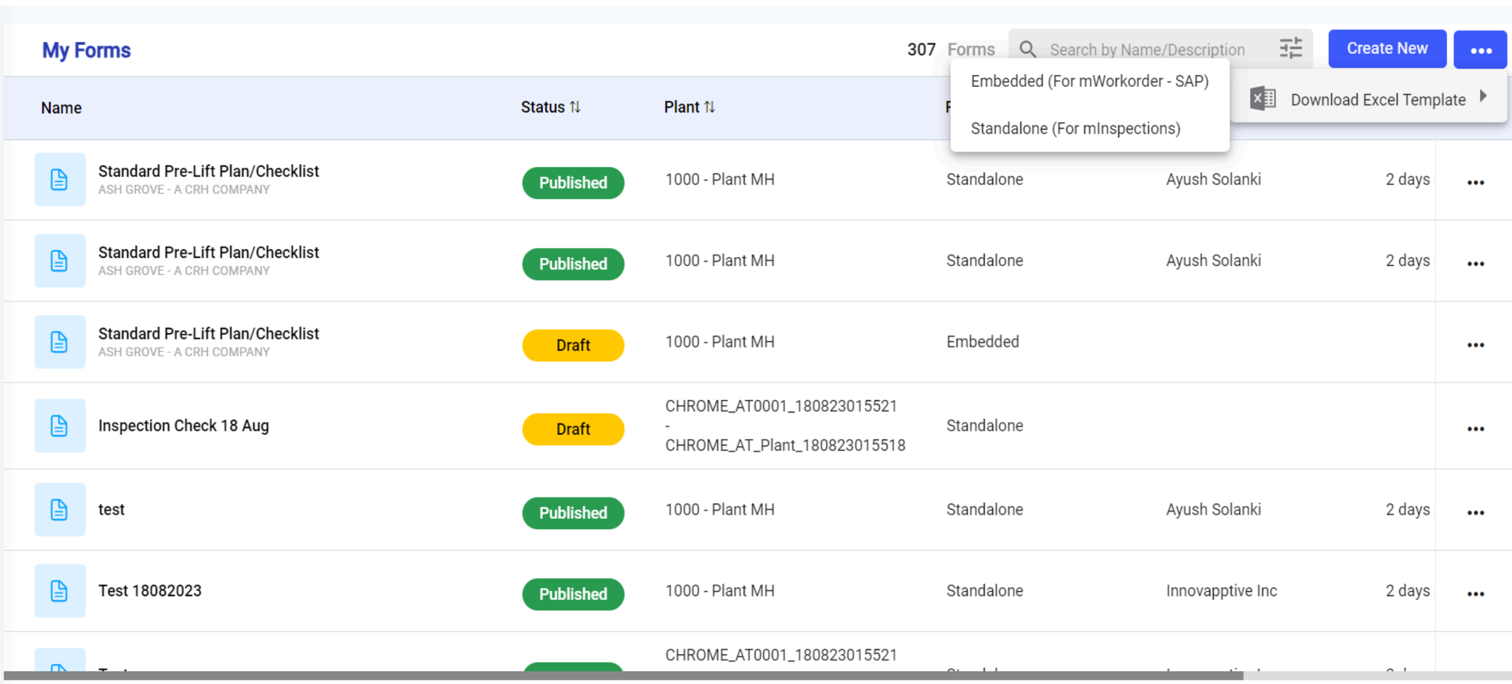
You can save time by bulk uploading one or more forms from an Excel sheet instead of creating them individually.

Download the Excel template, add information to the Excel, and then upload it to create a new form.

To bulk upload the forms:

1. In the **My Forms** screen, click the More icon on the top right corner.
2. Hover the mouse on **Download Excel Template** and select **Embedded (For mWorkOrder)** or **Standalone (For mInspections)**.

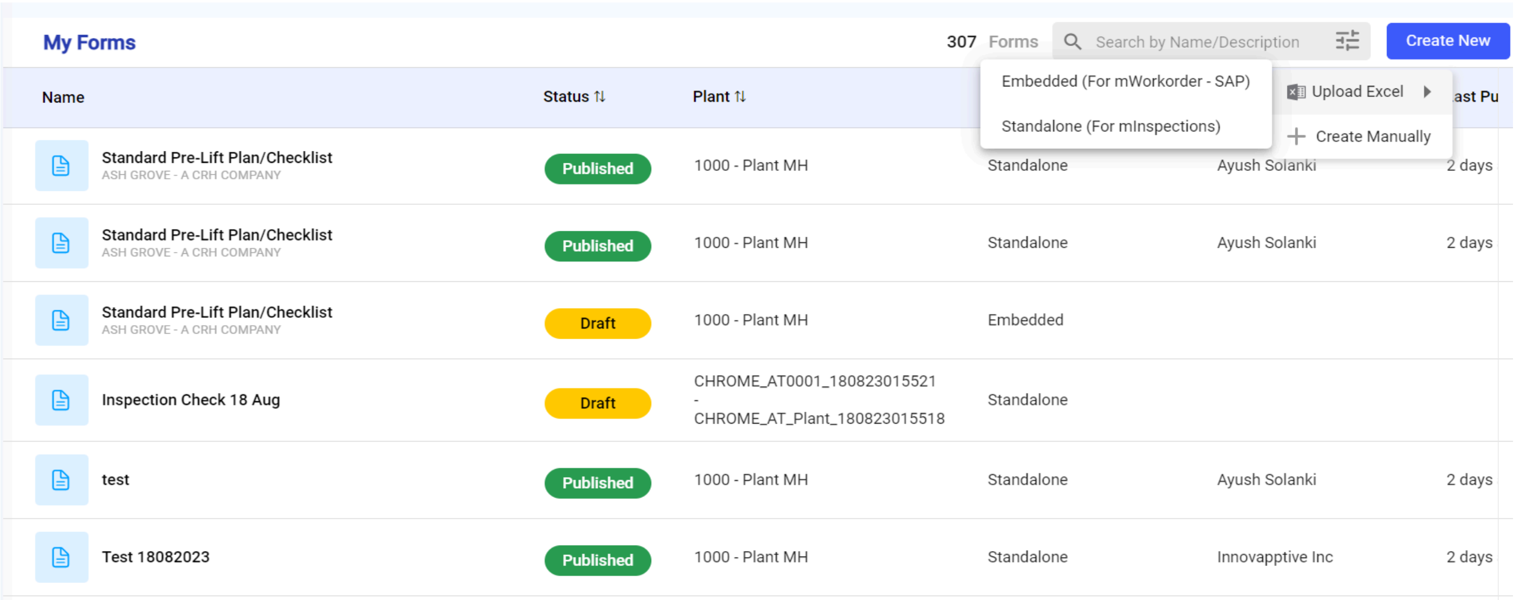
Figure 3-33 Download Excel Sheet



Selected template Excel file is downloaded.

3. Fill the Excel file with the required data.
4. Navigate back to **My Forms** screen.
5. Click the **Create New** button on the top right.
6. Hover the mouse on **Upload Excel** and select **Embedded (For mWorkOrder)** or **Standalone (For mInspections)**.

Figure 3-34 Upload Excel File



The File Explorer window is displayed.

7. Select the previously filled Excel file and click **Open**.
8. In the Progress pop-up, click **Review** and then **Close**.
   Form uploaded successfully message appears and you can see the uploaded form in the list with Draft status.

3.2.3. Create Inspection Forms from Templates

Templates save time, increase consistency, and eliminate errors while creating forms.

Create a form template with multiple sections and questions. You can import sections and questions to create a form quickly. When you make changes to sections or questions in the template, the changes automatically get reflected in all the forms that use the template. You can also copy, edit, and archive templates.

Templates have the following status:

- **Draft**: Form Author started creating a template, but it is not complete yet.
- **Ready**: Form Author created and saved the template and it is ready to use to create forms.

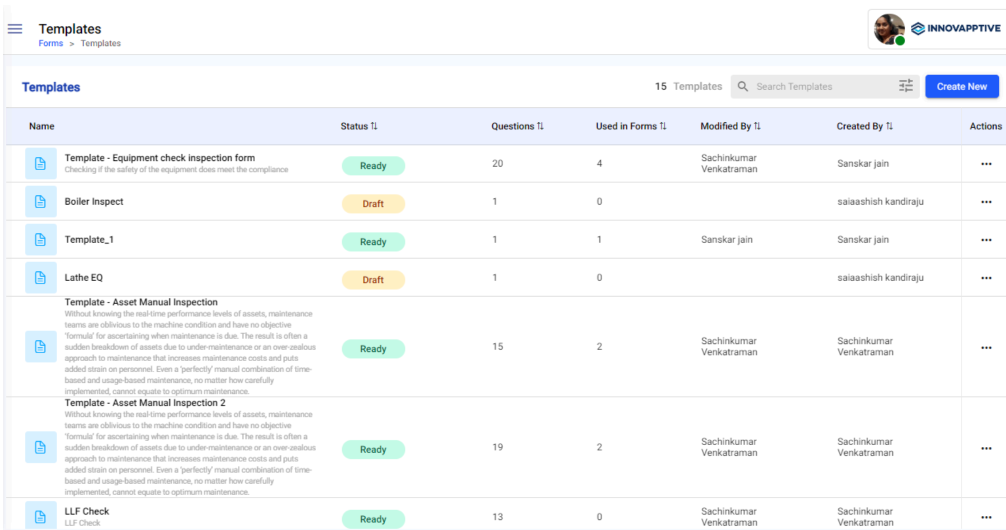
3.2.3.1. Create Form Templates

Create a form that includes organized sections with specific questions for data collection.

To create a form template:

1. Click the **Templates** section on the left-side pane.

Figure 3-35 Templates Screen



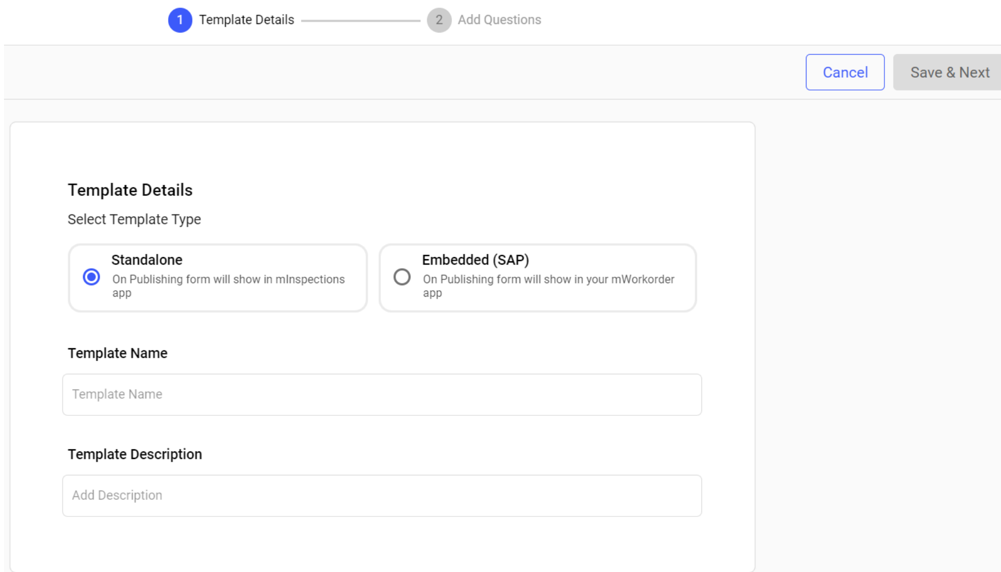
The Templates screen with the list of draft and ready form templates is displayed.

2. Click the **Create New** button.
3. In the **Template Details** screen, fill in the following details.

Table 3-2 Fill Template Details

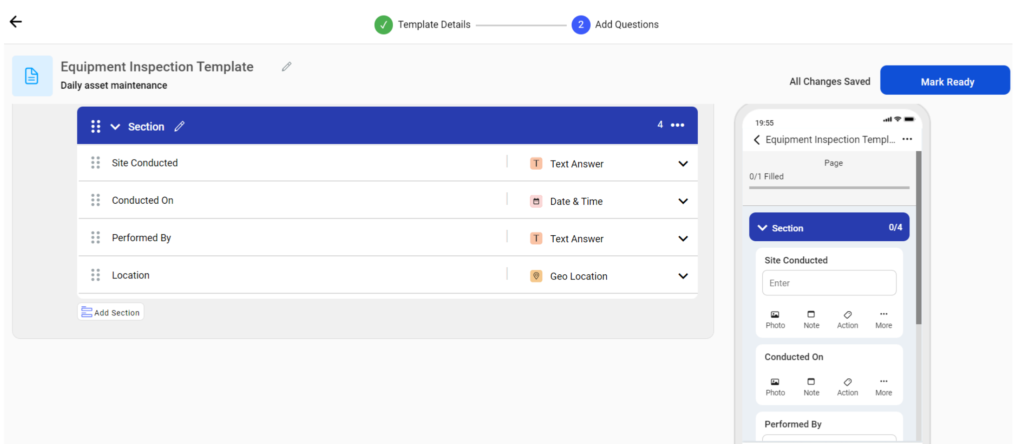
Field	Description
Template Type	Select template type **Standalone** or **Embedded**. **Note:** **Standalone** template is for mInspections application. **Embedded** template is for mWorkOrder application.
Template Name	Enter a name of the template. For example, Equipment Inspection Template.
Template Description	Add a short description about the template.

Figure 3-36 Template Details Screen



4. Click the **Save & Next** button.

Figure 3-37 Create Template



5. In the Template Details screen, add sections and questions and click **Mark Ready** to save the template.
6. In the **Forms that will reflect Template changes** window, select a form if the form is already created using the template to reflect the changes and click **Done**.
   A message Form template is created successfully is displayed and the template appears with the **Ready** status in the templates list. If you leave the creation in the middle without submitting the template then it is displayed with the **Draft** status.

3.2.3.2. Import Questions from Template

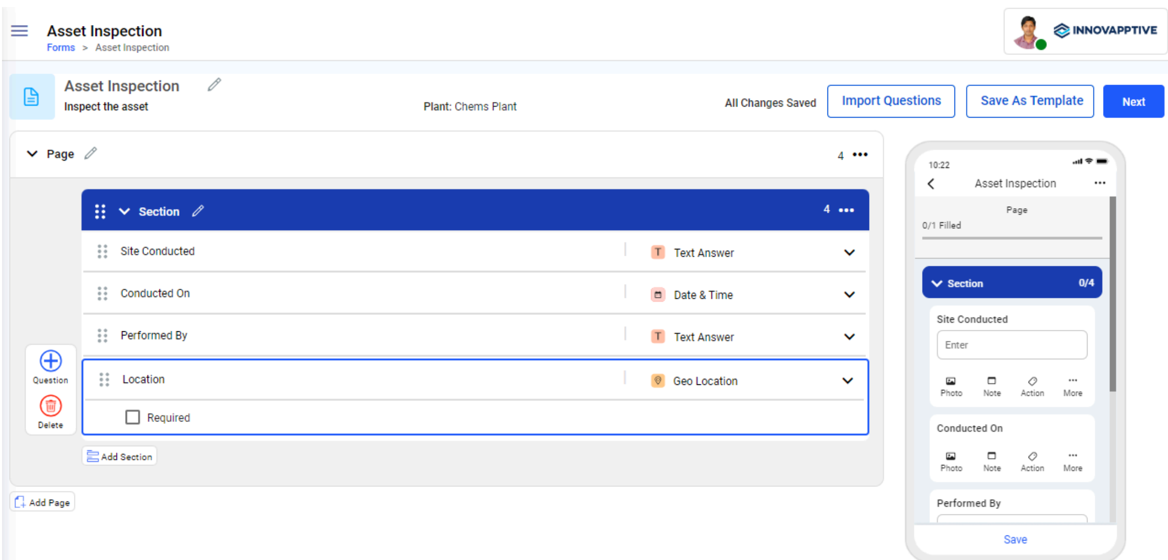
You can import sections and questions from the template to create a form quickly.

To import questions from the template:

1. Expand **Forms** and select **My Forms** section.
2. In the **My Forms** screen, click **Create New** and select **Create Manually**.

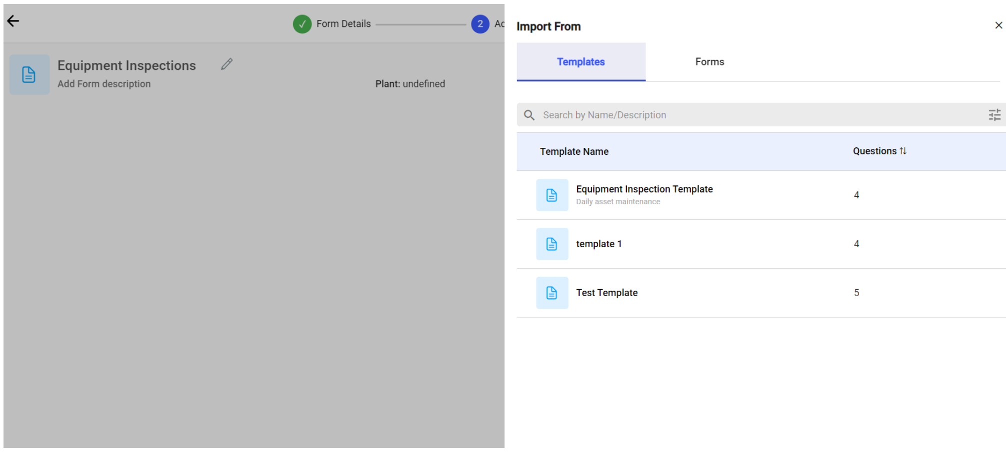
   or

   Select the existing form and click **Edit Form** on the right-side window.
3. In the **Form Details** screen, update the details like **Form Type**, **Form Name**, **Description**, **Plant**, **Tags**, **Notes and Attachments**, & **Additional Details** and click **Save & Next**.



4. Click the **Import Questions** button.
5. In the **Import Form** window, click the **Templates** tab.
6. Select the template from the list.

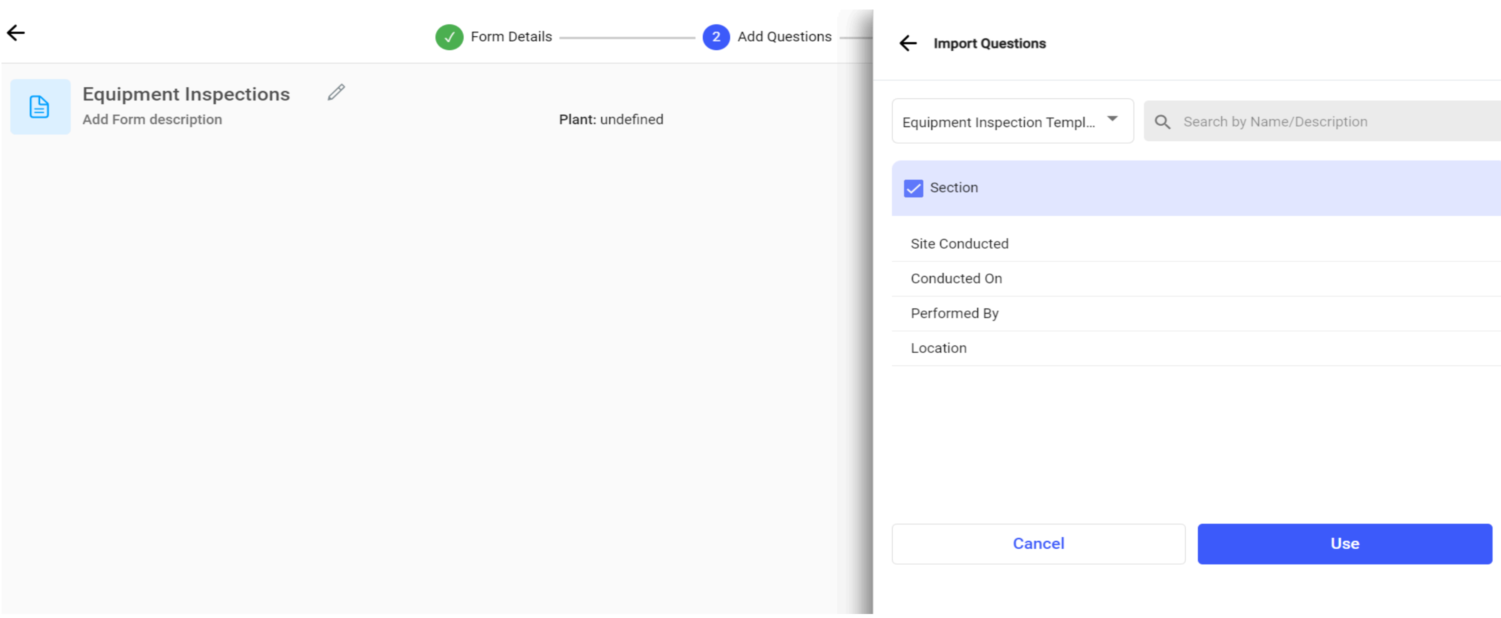
Figure 3-38 Select Template



Note:
You can do fuzzy search or search the templates associated with the tags. For example, Inspection.

7. Select the whole section with questions and click **Use**.

Figure 3-39 Select Questions



A pop-up with create a new page/section or import to the current page/section appears.

8. Select **Add as new page** or **Add to existing page** option.
9. Click **Import**.
   Questions imported successfully message appears.

3.2.3.3. Create Templates from Existing Templates

You can copy the details of an existing template and create a new template instantly.

To copy an existing template and create a new one:

1. Click the **Templates** section on the left-side pane.
   The Templates screen with the list of draft and published form templates is displayed.
2. Click the More icon and select **Copy** for the form template that you want to copy.
   A copy of the template is created and you can see the copied template in the list.
3. Click on the copied template and click Edit.
4. Update the template as required.

3.2.3.4. Edit Form Templates

As a Form Author, you can edit form templates to meet the new requirements of asset inspection. As part of editing a form template, you can change the name of the form, description, asset details for which you want to create a form. You can also edit, drag drop, copy, and delete pages, sections, and questions.

To edit a form template:

1. Click the **Templates** section on the left-side pane.
   The Templates screen with the list of draft and published form templates is displayed.
2. Click the More icon and select **Edit** for the form template that you want to edit.
3. In the Form Template Edit screen, update the form template as required.
4. Click **Mark Ready**.
   Forms that will be affected are displayed.
5. Select the form and click **Done**.
   The changes automatically get reflected in all the forms that use the template.

3.2.3.5. Archive Form Templates

Archive form templates when no longer needed for asset inspection, restore archived forms, and delete forms as necessary.

To archive a form template:

1. Click the **Templates** section on the left-side pane.
   The Templates screen with the list of draft and published form templates is displayed.
2. Click the More ••• icon and select **Archive** for the form template that you want to archive.

   The form template is archived and is displayed in the **Templates** tab in the **Archived** screen.

   In the **Templates** tab, click the More ••• icon and select **Restore** to restore the template or select **Delete** to permanently delete the template.

3.2.4. Schedule and Assign Form

Inspections can be scheduled at header or question level based on dates or frequency such as daily, weekly, bi-weekly, or monthly. Technicians can be assigned based on their availability during shifts and slots, but only published rounds can be scheduled and assigned.

The assigned forms are visible and accessible in the mInspections application. The technicians work on their inspections, fill in their responses, and submit completed inspections.

Published forms have the following status:

- **Scheduled**: Scheduled forms are pre-planned cycles or routines that occur at regular intervals. For example, a weekly form to check the bearings of a pump.
- **Unscheduled**: Default status of a published form is Unscheduled. These could be one time checks and not necessarily periodic ones that require immediate attention.

3.2.4.1. Schedule Forms by Frequency and Assign

Schedule forms to repeat every week, month or even a year.

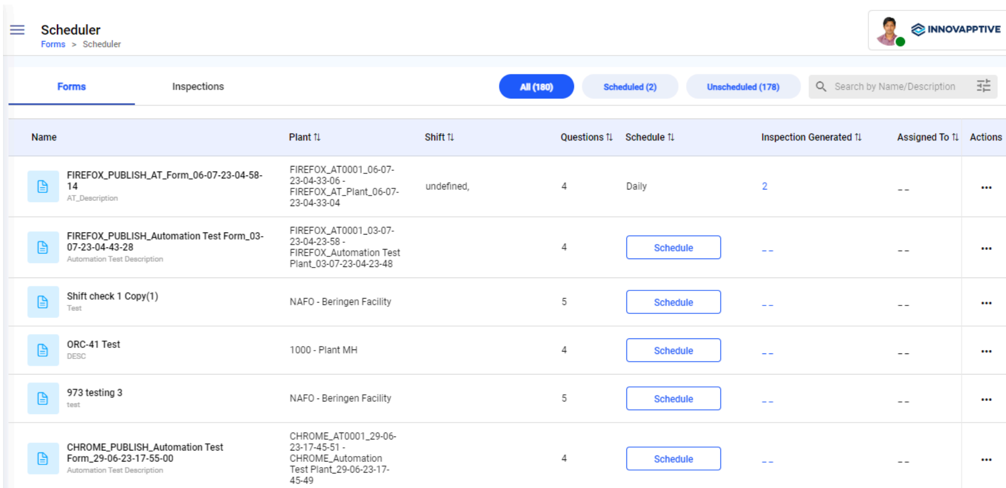
To schedule forms by frequency:

1. Expand the **Forms** module and click **Scheduler** on the left-side pane.
2. In the **Forms** tab, click **Schedule** on the form that you want to schedule.

   Or

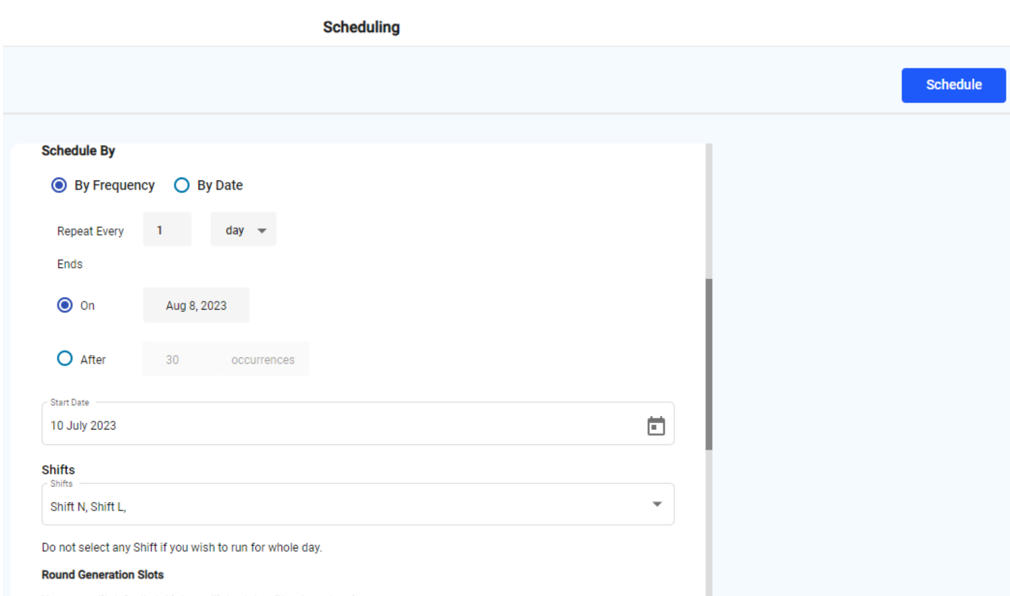
   Click the More *** icon and select **Schedule** for the selected form that you want to schedule.

   Figure 3-40 Select Schedule Option

3. In the **Scheduling** screen, choose the **By Frequency** radio button.

   Figure 3-41 Schedule Form by Frequency

4. Enter the number of days the inspection should repeat in the **Repeat every <number> <day>, <week> or <month>** field.
5. Select when to end the inspection from **Ends On <Date>**, **Ends After <number> Occurrences**.
6. In the **Start Date** field, select the start date.
7. In the **Shifts** drop-down, select the relevant shift.

> **Note:**
> If you haven't selected any shift then the inspection is generated based on Frequency and it is valid for the entire day till 23:59 hours and becomes overdue if not submitted.

8. Select slots in the shift.

> **Note:**
>
> If no shifts are assigned to a plant while creating a plant, the entire day, from 00:00 to 23:59 is considered as the default slot. A maximum of 24 slots with a minimum of one hour duration can be created in a day. Click the More icon and select Remove to delete the slot.
>
> For example, if you consider a plant with no shifts, 12 slots of two hours duration each can be created. If you consider a plant with 3 shifts, every shift can be divided into a maximum of 8 slots with a minimum of one hour duration each shift. Slot time can be adjusted. Ensure that it does not overlap with other slots. The slot start time and end time need no tot match with the end and start times of either the slot or shift.

9. In the **Assigned To** field,

   Choose the **Plant** radio button to assign the scheduled inspection to a plant and select the name of the plant from the drop-down.

   Or

   Choose the **User Group** radio button to assign the scheduled inspection to a specific user group and select the name of the user group from the drop-down.

   Or

Choose the **User** radio button to assign the scheduled inspection to a technician and select the name of the technician from the drop-down.

10. In the **Inspections Generation** drop-down, select the number of days you like to generate inspections at a time in advance.

> **Note:**
>
> For example, if a plant has 3 shifts, the inspection is scheduled daily for 3 shifts and 2 slots in each shift, and Inspections Generation is 1, then 6 inspections (1 inspection for every slot in every shift 2*3) are generated for today and 6 inspections are generated for tomorrow (total 12 rounds). If the inspection is not submitted before the end of the slot (if created for slot)/ shift (if created for shift), the inspection's status is changed to overdue based on the timezone configured for the plant.
>
> Every Split Slot Start Time and End Time marks the inspection's life-cycle and the mobile application's time zone should match the plant's time zone as created in the web application.

11. Click **Schedule**.

    A message "Inspection has been scheduled successfully" appears. Click **View Inspections** to see inspection details or click **Close** to close the pop-up.

3.2.4.2. Schedule Forms by Date and Assign

Schedule an inspection at header level by date to execute on particular dates.

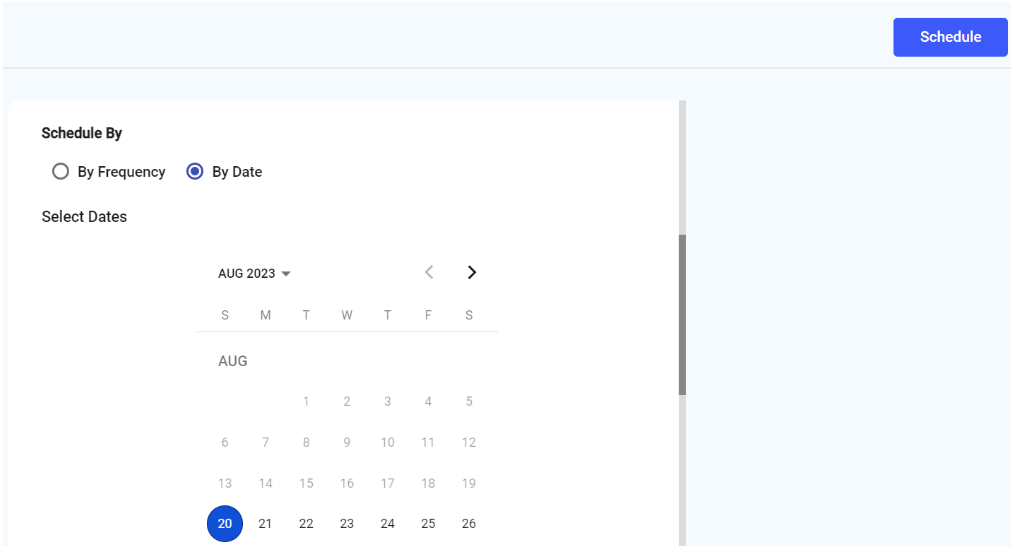
To schedule forms by date:

1. Expand the **Forms** module and click **Scheduler** on the left-side pane.
2. In the **Forms** tab, click **Schedule** on the form that you want to schedule.

   Or

   Click the More ••• icon and select **Schedule** for the selected form that you want to schedule.
3. In the **Scheduling** screen, choose the **By Date** radio button.

Figure 3-42 Schedule Inspections by Date



4. Select the date from the calendar.
5. In the **Shifts** drop-down, select the relevant shift.
6. Select slots for the selected shift.
7. In the **Assigned To** field,

   Choose the **Plant** radio button to assign the scheduled inspection to a plant and select the name of the plant from the drop-down.

   Or

   Choose the **User** radio button to assign the scheduled inspection to a technician and select the name of the technician from the drop-down.

   Or

   Choose the **Unit** radio button to assign the scheduled inspection to a specific unit or functional location and select the unit the drop-down.

   Or

   Choose the **Position** radio button to assign the scheduled inspection to a specific position and select the name of the position from the drop-down

   Choose the **User Group** radio button to assign the scheduled inspection to a specific user group and select the name of the user group from the drop-down.

Or

8. In the **Inspections Generation** drop-down, select the number of days you like to generate inspections at a time in advance.
9. Click **Schedule**.

   A message "Inspection has been scheduled successfully" appears. Click **View Inspections** to see inspection details or click **Close** to close the pop-up.

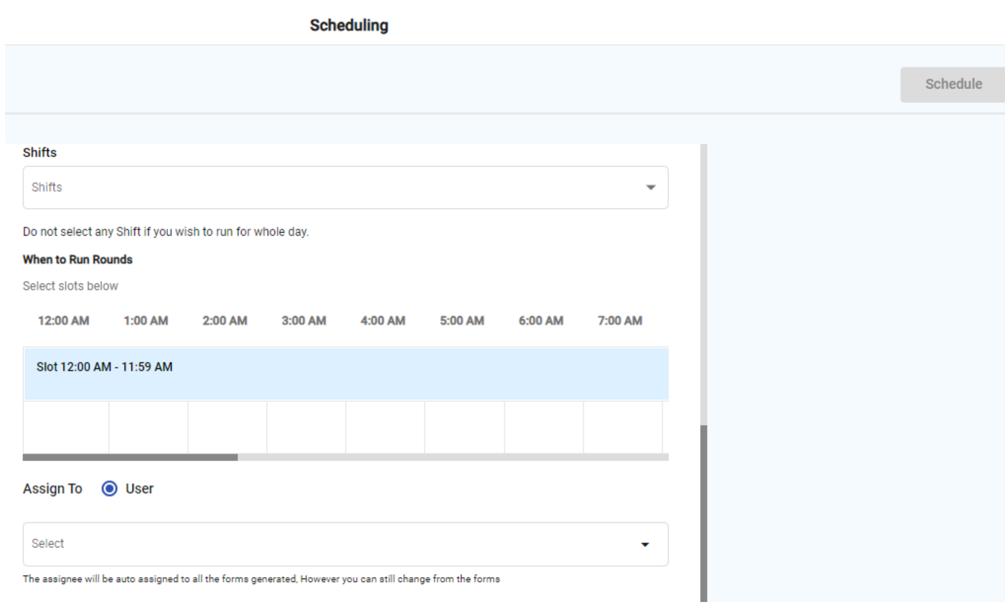
3.2.4.3. Modify a schedule

Modify schedule of an inspection to meet the changing asset maintenance requirements.

To modify the schedule of an inspection:

1. Click the **Scheduler** section on the left-side pane.
   The Forms screen with the list of unscheduled and scheduled forms is displayed.
2. Click the More icon and select **Modify Schedule** for the selected inspection that you want to modify.
3. In the **Scheduling** screen, modify the schedule or the technician.
4. Click **Schedule** to reschedule after modifying the inspection schedule.

Figure 3-43 Modify Schedule



3.2.4.4. Schedule Inspections at Question Level

Schedule Inspections based on individual question frequencies.

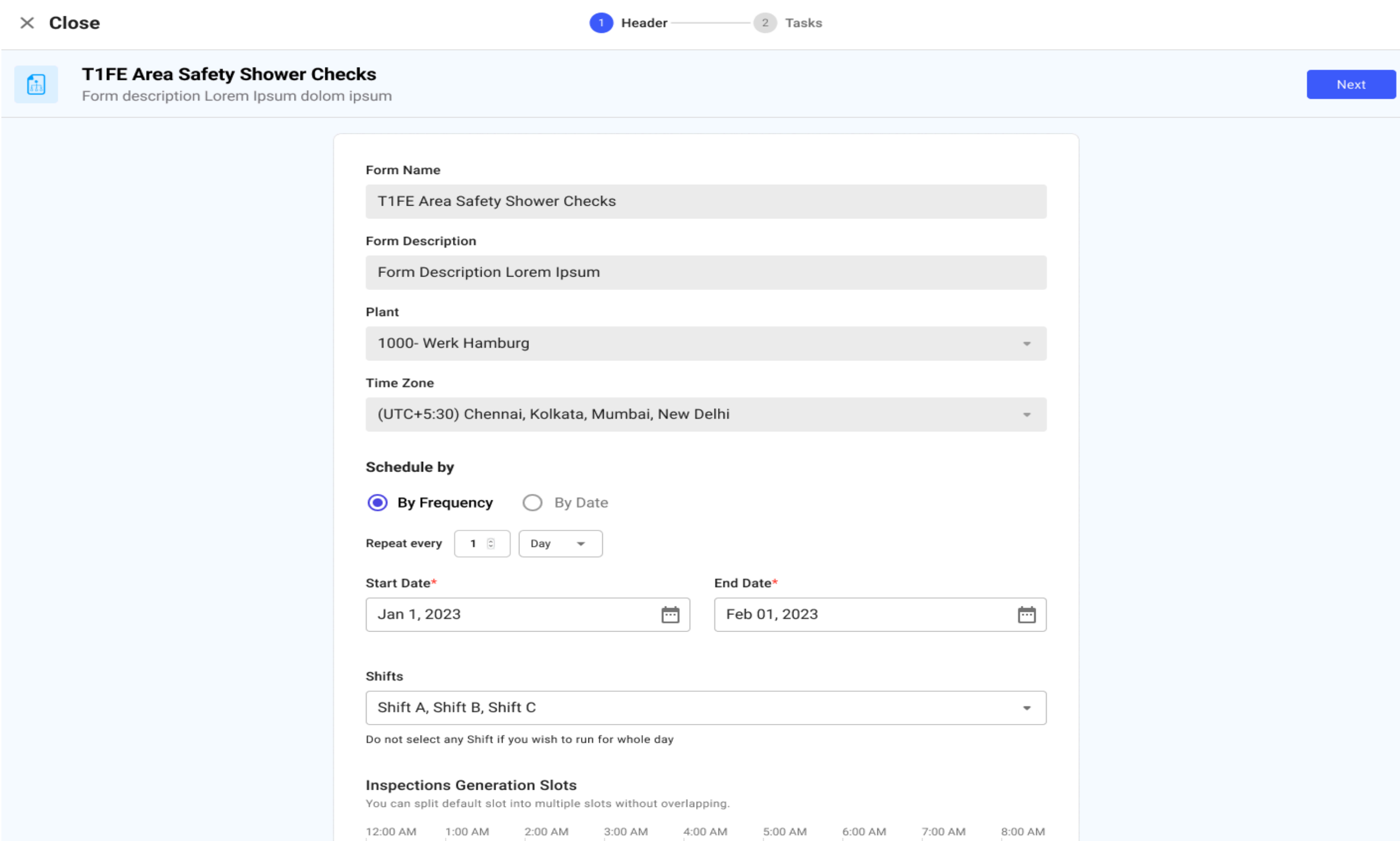
To schedule an inspection at question level:

1. Expand the **Forms** module and click **Scheduler** on the left-side pane.
2. In the **Forms** tab, click **Schedule** on the inspection that you want to schedule.

   Or

   Click the More icon adjacent to the inspection that you want to schedule and select **Schedule**.
3. In the **Header** screen, fill the details. For more information, see Schedule Forms by Frequency and Assign *(on page 144)* and Schedule Forms by Date and Assign *(on page 147)*.
4. Click **Next** on top right.
5. In the **Questions** screen,
   a. Select the location or asset in the **Locations / Assets** section on the left side.
   b. Select the questions or whole section in the middle section.
   c. Fill the details in the **Revise Schedule** section on the right side.
   d. Click **Revise**.

Figure 3-44 Schedule Form at Question Level



A message "Schedule Revised Successfully" appears.

6. Click **Schedule** on top right.
   A message "Scheduled Successfully" appears and the selected questions are scheduled.

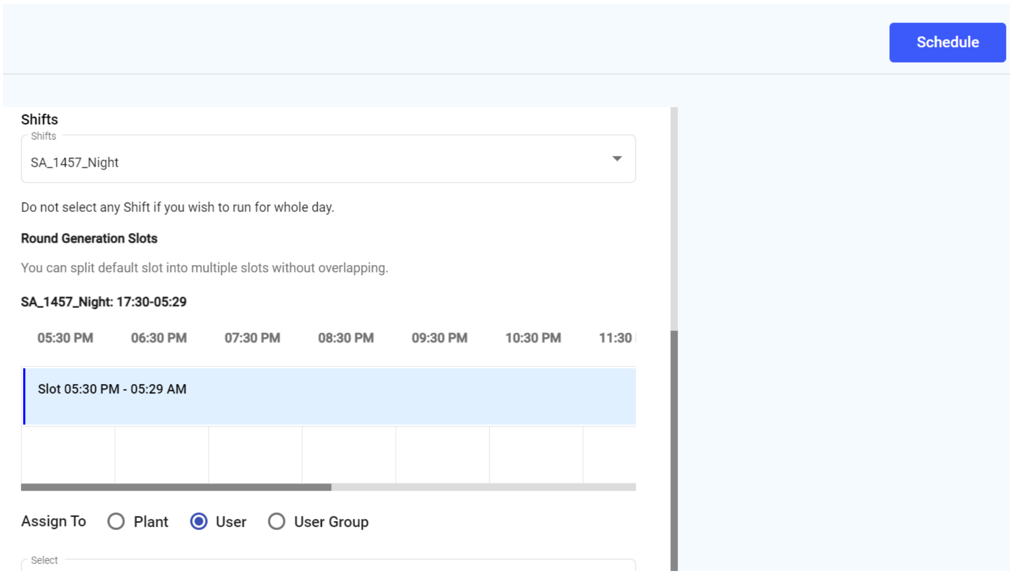
3.3. Create Ad-Hoc Forms

Generate and schedule an Ad-hoc form from Published or Scheduled forms from the web app for emergency situations.

To generate an ad-hoc form from the web app:

1. Expand the **Forms** and click **Scheduler**.
2. In the Forms tab, click the More icon > select **Create Ad Hoc Inspections** for the selected form.
3. Fill the scheduling details.

Figure 3-45 Create adhoc form



> **Note:**
> You can update only the Shift and Slot details.

4. Click **Schedule**.

   A message "Scheduled Successfully" appears with **View Forms** and **Close** buttons. Click **View Forms** to see the newly created ad hoc form.

   To view the list of ad hoc inspections, in the **Forms** tab, click the Menu icon > **Show Ad Hoc Inspections** and you can see the inspection in the Inspections tab.

3.4. Monitor Inspections

Monitor inspections execution by viewing the status of inspections and accessing forms and inspection details.

This topic contains the following sub topics,

- View Status of Forms *(on page 153)*
- View Forms and Form Details *(on page 154)*

3.4.1. View Status of Forms

Form Authors can monitor inspections progress by viewing the status of scheduled forms.

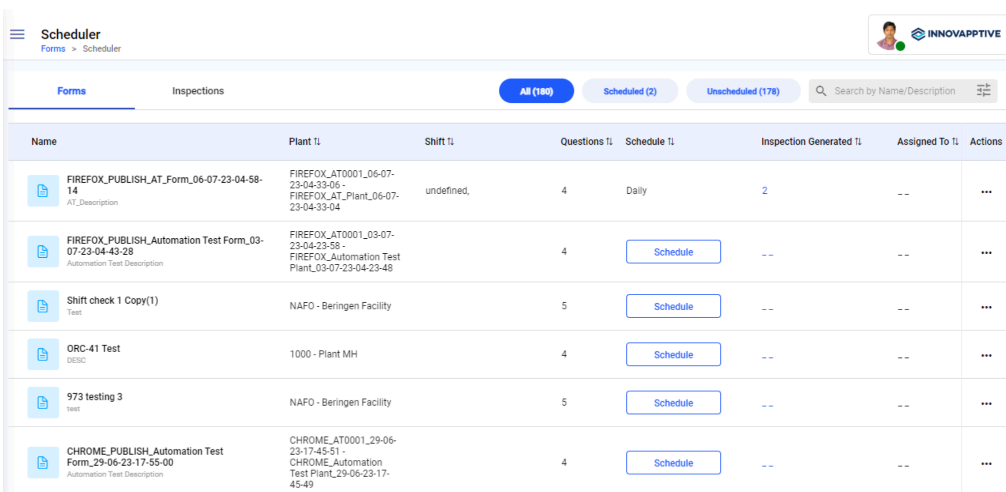
Scheduled inspections have the following status:

- **Open**: Form is scheduled but not assigned to the technicians or inspection is assigned to the technician but the technician unassigned it without any progress.
- **Assigned**: Inspection is scheduled and assigned to the technician and the technician is yet to start the inspection and fill the data.
- **In Progress**: Technician started inspecting an asset and filling the data.
- **Partly Opened**: Form is assigned to the technician but later was unassigned.
- **Submitted**: Technician has completed inspection and filled the data in the form.
- **Skipped**: Inspection that is entirely skipped by the technician with a reason.
- **Overdue**: Inspection that is not submitted before the due date and time.

To view the status of forms:

1. Click the Hamburger menu on the top left of the screen.
2. Expand **Forms** and select **Scheduler**.

Figure 3-46 Forms Tab



3. Click the **Inspections** tab.

   You can view the list of Open, Partly Open, Assigned, In-Progress, and Submitted forms and the details like shift, technician, status, and so on.

4. Select the required form to view the form summary on the right side.

3.4.2. View Forms and Form Details

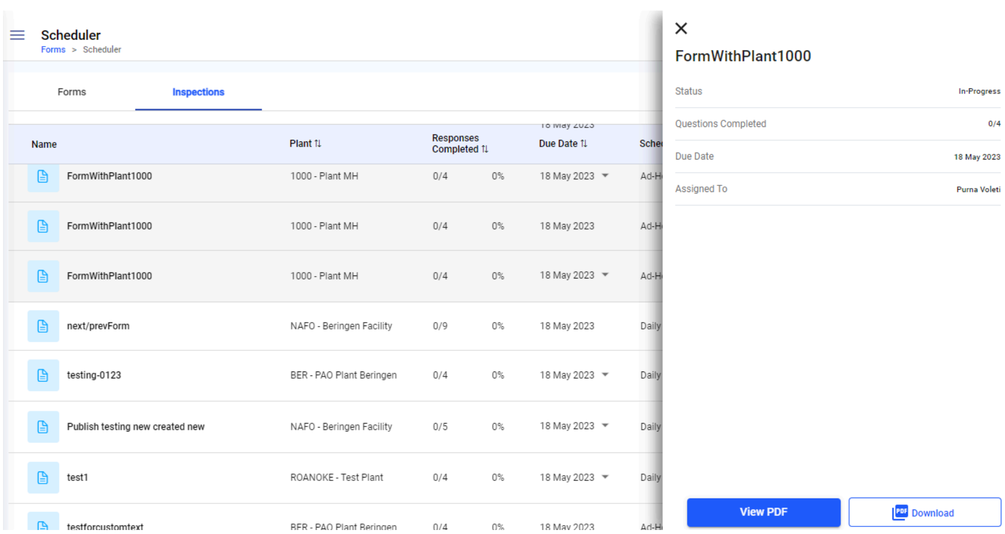
You can access a list of forms and view their details in the Forms tab within the Scheduler section.

To view forms list and form details:

1. Click the **Scheduler** section on the left-side pane.
2. Click the **Forms** tab.
   You can view the list of unscheduled and scheduled forms.
3. Click the More icon and select **Show Forms** for the selected form.
   You can view the list of all scheduled forms in the **Inspections** tab.
4. Click the More icon and select **Show Details** for the selected form.
   You can view the form details on the left side. Click **View PDF** to view the details in PDF or click **Download** to download the details in PDF format. You can also click the links inside the PDF to view and download the attachments like video, audio, and documents. For more information, see Configure Round Plan Details PDF *(on page 132)*.

> **Note:**
> Select the reason in the **Reason** column for **Overdue** inspection.

Figure 3-47 View Form and Form Details

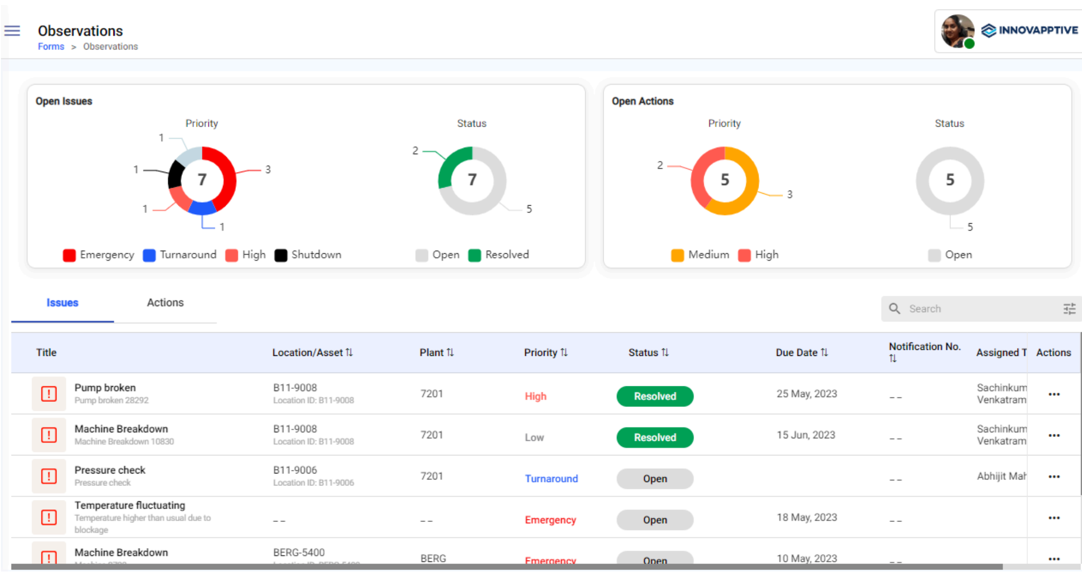


3.5. Create and Manage Issues and Actions

Manage issues and actions in the Observations section of the mInspections application. Technicians create and view these while executing inspections, with email alerts sent for issue/action creation, assignment, and closure.

The Observations dashboard graphically represents Open Issues and Open Actions information in doughnut charts, categorized by their priority and status. You can filter actions and issues by Plant and Unit.

Figure 3-48 Observations Screen



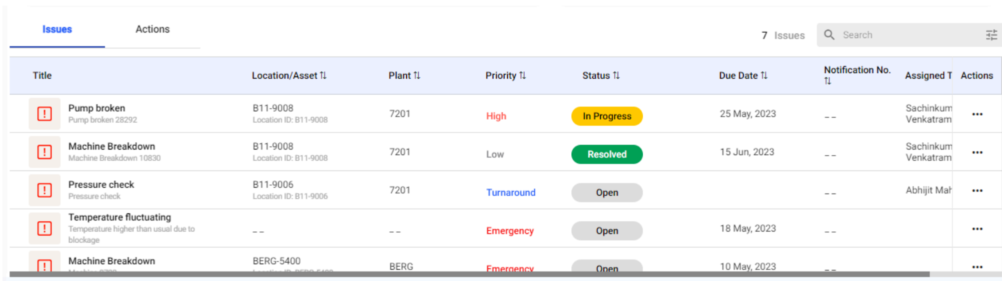
3.5.1. View Issues

The Issues tab lists all the issues reported by the technicians while filling in the forms. The issues can be sorted based on **Location/Asset**, **Plant**, **Priority**, **Status**, **Due Date**, **Notification No**, and **Assigned To**.

To view issues:

1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
   You can view the list of issues.

Figure 3-49 Issues Tab



3. Click the More icon and select **Show Details** of the selected issue to view the details.

> **Note:**
>
> Issue Due Date is based on the Plant time zone. The mobile applications time zone must be in line with the plant's time zone as created in the web application.

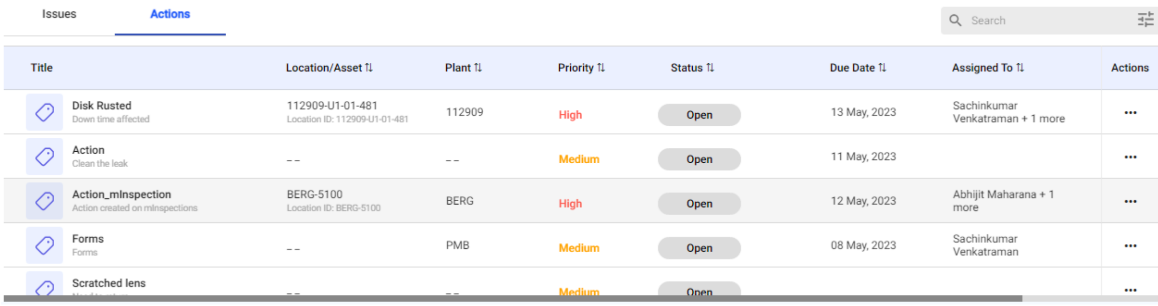
3.5.2. View Actions

The Actions tab lists all the follow-up actions raised by the technicians. The actions can be sorted based on **Location/Asset**, **Plant**, **Priority**, **Status**, **Due Date**, **Notification No**, and **Assigned To**.

To view actions:

1. Click the **Observations** section on the left-side pane.
2. Click the **Actions** tab.

   You can view the list of open actions.



3. Click the More ••• icon and select **Show Details** of the selected action to see the details.

> **Note:**
>
> Action Due Date is based on the Plant time zone. The mobile application's time zone must be in line with the plant's time zone as created in the web application.

3.5.3. Create an Issue

You can create an issue and assign it to a user group from the web application, ensuring that inspections are efficiently delegated and tracked to completion.

To create an issue:

1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
3. Click **Create Issue**.
4. In the **Create Issue** screen, do the following,
   a. Enter the issue title in the **Title** field.
   b. Enter the issue description in the **Description** field.
   c. Select the **Category** as **Observation**, **Maintenance**, **Incident**, **Near Miss**, or **Hazard** from the list.
   d. Select the **Priority** and select the **Event Execution** as **Shutdown**, **Turnaround**, or **General** from the list.

> **Note:**
> If you select the **Category** as **Maintenance**, the issue is converted to a notification automatically.

e. Add images in the **Photos** field.
f. Select the **Plant**, **Unit**, **Location**, and **Asset** from the respective drop-down.
g. In the **Assign to** drop-down field,
   - Choose **User** and select the user from the drop-down.
   - or
   - Choose **User Group** and select the user group from the drop-down.
h. Select **Start Date** and **Time**.
i. Select **Due Date** and **Time**.
j. Select the **Status** as **Open**, **In-Progress**, or **Resolved**.

5. Click **Create**.

   The issue is created successfully.

3.5.4. Create an Action

You can create and assign actions to user groups from the web application.

To create an action:

1. Click the **Observations** section on the left-side pane.
2. Click the **Actions** tab.
3. Click **Create Action**.
4. In the **Create Action** screen, do the following,
   a. Enter the action title in the **Title** field.
   b. Enter the action description in the **Description** field.
   c. Select the **Priority** as **High**, **Medium**, or **Low**.
   d. Add images in the **Photos** field.
   e. Select the **Plant**, **Location**, and **Asset** from the respective dropdowns.
   f. In the **Assign to** drop-down,

- Choose **User** and select the user from the drop-down.

  or

- Choose **User Group** and select the user group from the drop-down.

g. Select **Due Date** and **Time**.

h. Select the **Status** as **Open**, **In-Progress**, or **Resolved**.

5. Click **Create**.

3.6. Create ERP Notification against an asset

Create a notification for equipment or functional location while conducting inspections. The Notification triggers in the backend SAP system with a notification number.

For example, while conducting inspections, if you observe that the bearings in a pump are not working as expected, you can create an issue to notify this to the supervisor. The supervisor can convert this issue into a notification and then the notification number displays in the backend ERP system.

To create a notification against an asset:

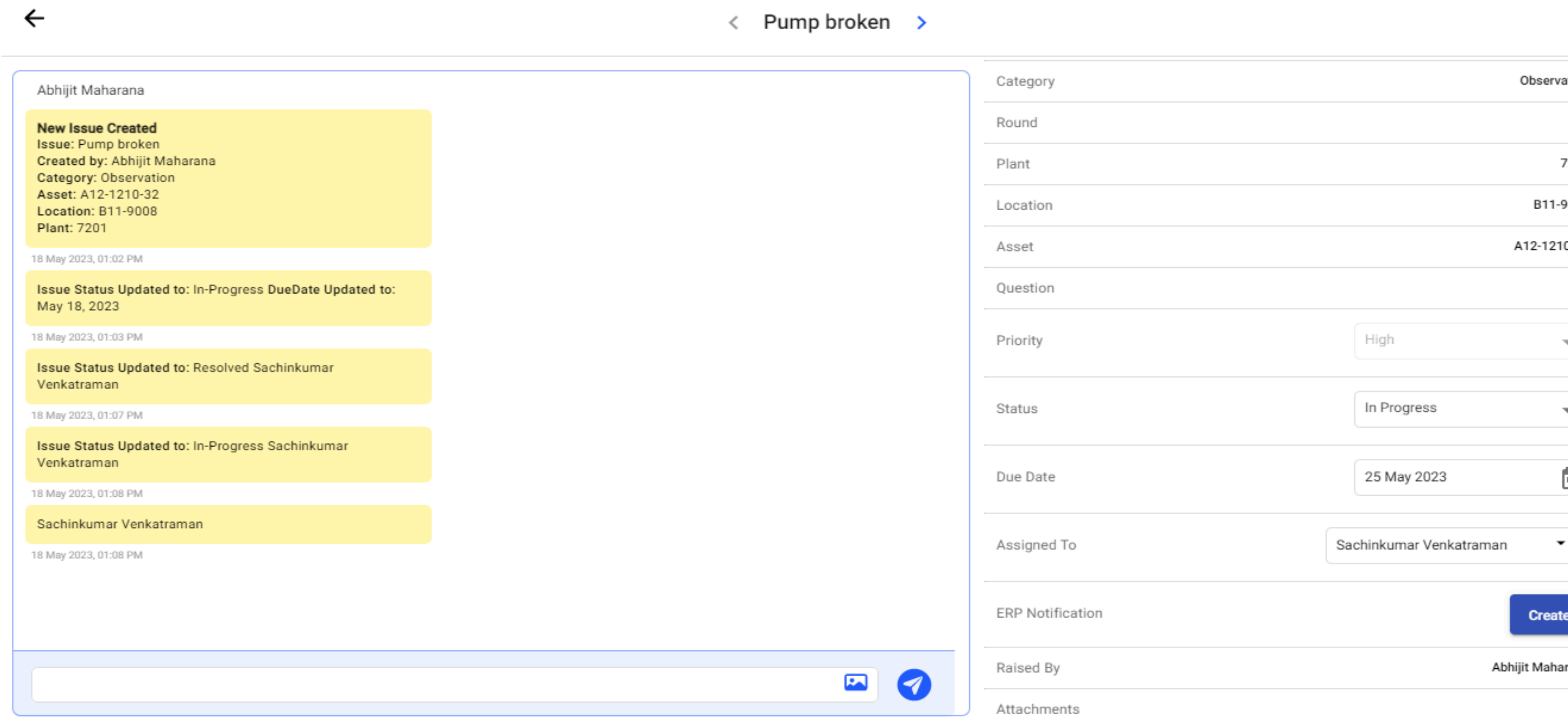
1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
3. Click the More ••• icon > **Show Details** of the selected issue.

   or

   Double-click the issue to open.

   The log history window is displayed.

Figure 3-50 Create a Notification



4. Click the **Create** button in the **ERP Notification** field.

   An alert pop-up with following options is displayed:
   - **Show Issues with Notifications**: Click the option to view the history or previously raised notifications against the asset/location.
   - **Create New Notification Anyway**: Click the option to create or raise a new notification.
   - **Cancel**: Click the option to cancel the notification creation.

   The notification is created in the backend with the notification number.

3.7. Manage Inspections

This section covers topics such as Archive, Restore, and Delete Round Plans, as well as Search & Filter functionality for Rounds, Issues, and Actions.

This section has the following topics:

3.7.1. Archive, Restore, and Delete Forms

Form Authors can archive inactive forms for future retrieval or permanently delete them if they are no longer needed.

This chapter has following sections:

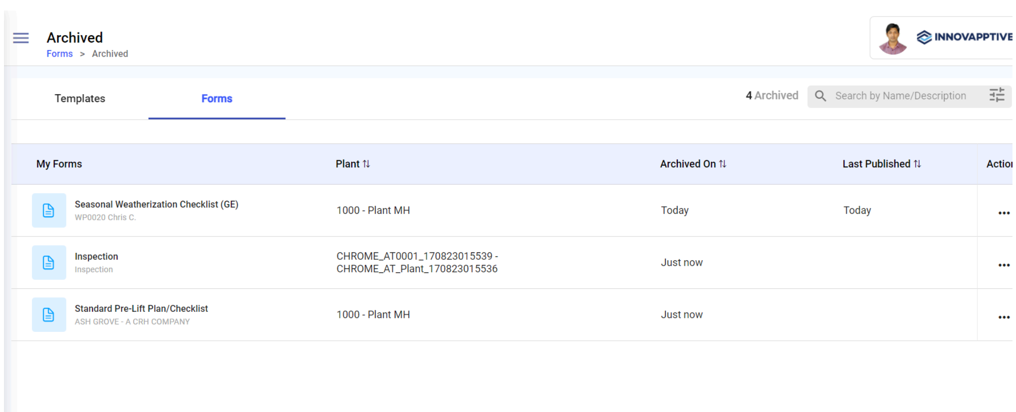
3.7.1.1. Archive Forms

You can archive inactive forms and remove them from the view.

To archive a form:

1. Click the **My Forms** section on the left-side pane.
2. Click the More icon and select **Archive** for the selected form that you want to archive.
   The form is archived and is displayed in the **Archive** screen.

Figure 3-51 Archived Screen



3.7.1.2. Restore Archived Forms

You can restore the archived form when you need them again.

To restore an archived form:

1. Click the **Archived** section on the left-side pane.
2. Click the **Forms** tab.
3. Click the More ••• icon and select **Restore** for the selected form that you want to restore.
   The form is restored and is displayed in the **My Forms** screen.

3.7.1.3. Delete Archived Forms

Delete the archived forms that are no longer needed for asset maintenance.

To permanently delete an archived form:

1. Click the **Archived** section on the left-side pane.
2. Click the **Forms** tab.
3. Click the More ••• icon and select **Delete** for the selected form that you want to delete.
   The form is permanently deleted.

3.7.2. Search and Filter Forms, Inspections, and Templates

Search and filters are powerful functionalities for finding information quickly, easily, and accurately. They help you to get the information you need quickly and effortlessly.

As a Form Author, you can search and navigate to the forms by entering the form name in the Search field in the **My Forms** screen. You can also filter the form list by Status, Modified By, and Created By criteria.

This chapter contains the following sections:

- Search Forms, Issues, Actions, and Templates *(on page 162)*
- Filter Forms, Issues, Actions, and Templates *(on page 163)*

3.7.2.1. Search Forms, Issues, Actions, and Templates

You can search created, published (scheduled and unscheduled), archived forms, issues, actions, and templates from their respective screens.

Navigate to the respective screen and enter the form, issue, action, or template name. The process is the same for searching any item.

To search forms, issues, actions, and templates:

1. Click the **My Forms** section on the left-side pane.
   Click **Scheduler** for published forms, **Archived** for archived forms, **Observations** for Issues & Actions, and **Templates** for form templates.
2. Enter the name of the form or associated tag in the **Search** field.
   The search results are displayed.
3. Select the form from the list.
   You can view the details of the selected form on the right side.

3.7.2.2. Filter Forms, Issues, Actions, and Templates

You can filter forms, issues, actions, and templates to quickly find the item you are looking for.

Navigate to the respective screen and filter forms, issues, actions, or templates. The process is the same for filtering any item.

To filter forms, issues, actions, and templates:

1. Click the **My Forms** section on the left-side pane.
   Click **Scheduler** for published form, **Archived** for archived forms, **Observations** for Issues & Actions, and **Templates** for form templates.
2. Click the **Filters** icon next to the **Search** field.
3. In the Filter window, select the **Status**, **Modified By**, and **Created By** values from the drop-down.
4. Click **Apply**.

   The Filtered list is displayed.

4. Working with Master Data

Use the **Master Configuration** module to add, modify, activate / deactivate Plants, Shifts, Location, Assets, Unit of Measurement, and Global Response Set master data. As an admin, you can create master data like plants, assets, locations, units of measurements, and global response set data that can be used to create forms and rounds.

You can view these details and edit them when required.

This chapter has the following topics:

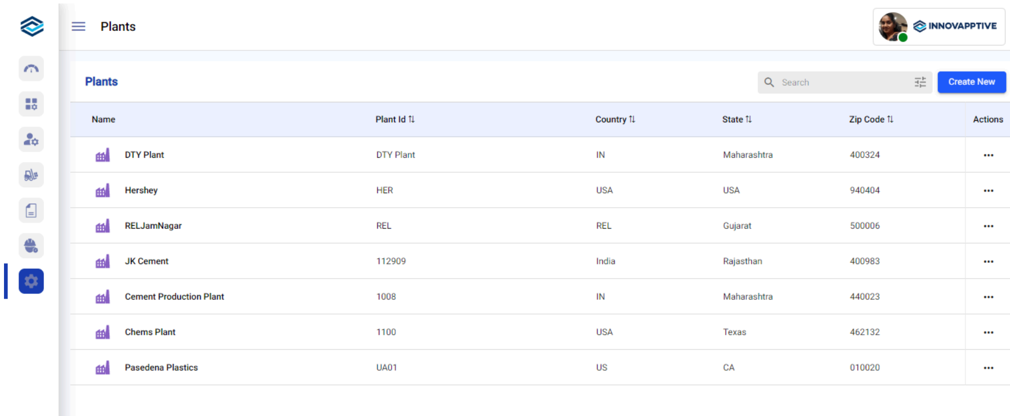
4.1. Create Plant Master Data

You can create plant master data which can be used for creating inspections and rounds by supervisors.

To create or add a plant data:

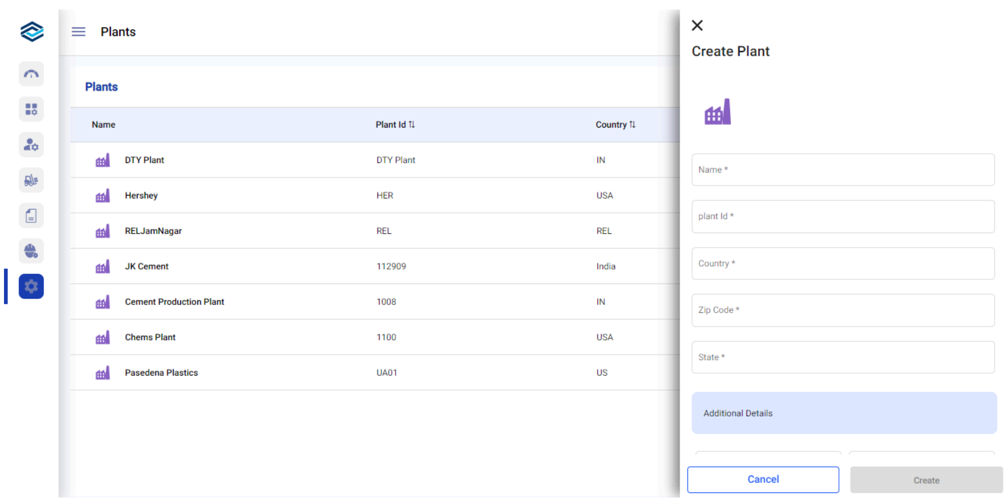
1. Click the **Master Configuration** module on the left side pane and click **Plants**.

Figure 4-1 Plants Screen



2. Click **Create New** and select **Add Manually**.

Figure 4-2 Add Plant Details



3. In the **Create Plant** window, enter plant details like **Name**, **Plant Id**, **Country**, **Zip Code**, **State**, **Time Zone**, **Shifts**, and **Additional Details**.

> **Note:**
> If the Plant ID already exists, an error message “Plant ID <> already exists” is displayed. Use another ID.

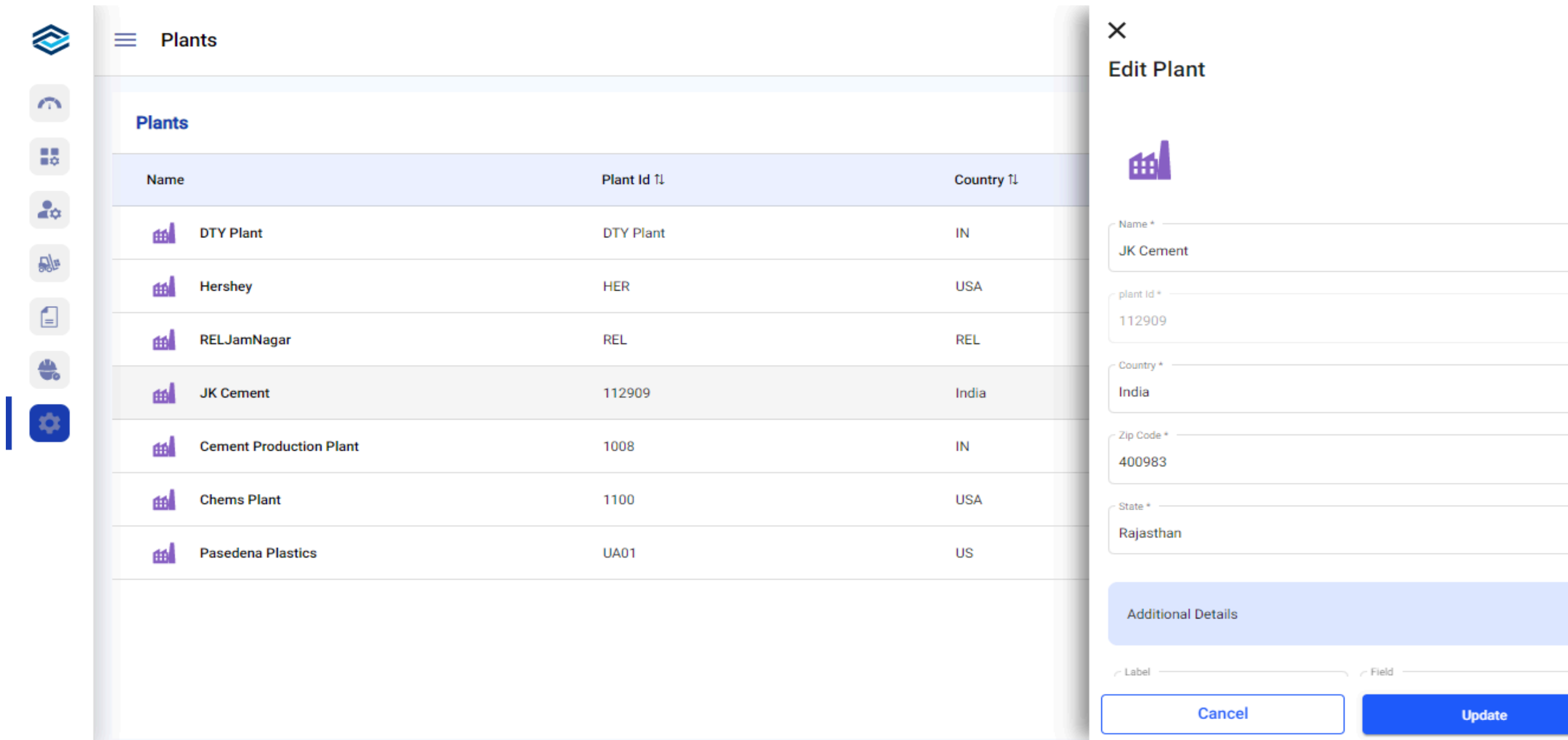
4. Select **Geo Location Tracking** toggle to enable geo-location tracking while executing rounds.
5. Click **Create**.

4.1.1. Modify Plant Master Data

To modify plant master data:

1. In the **Plans** screen, click the More ••• icon against the plant that you want to edit and select **Edit**.
2. In the **Edit Plan** window, update the details as required and click **Update**.

Figure 4-3 Update Plant Details



Plan details are updated successfully.

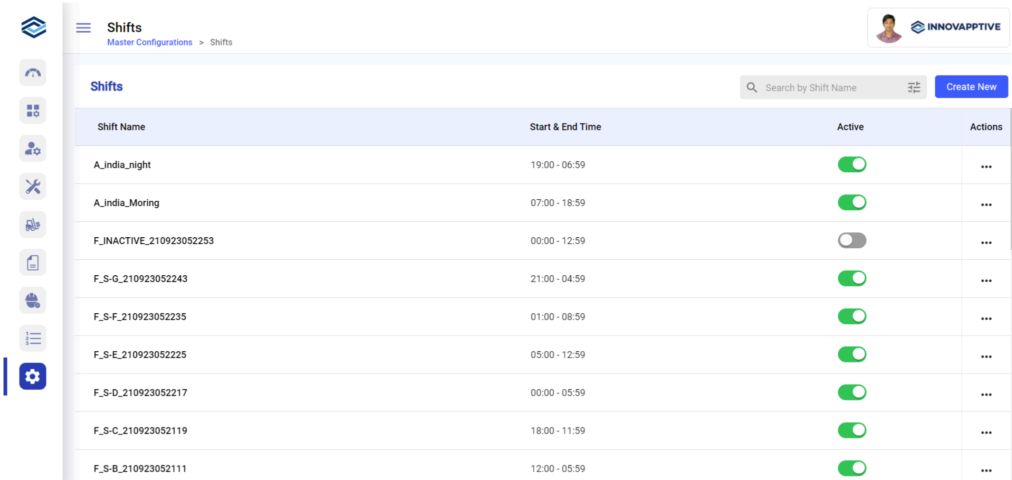
4.2. Create Shift Master data

You can create shift master data to define shifts for plants so that you can schedule the work execution for each shift accordingly.

To create or add a shift data:

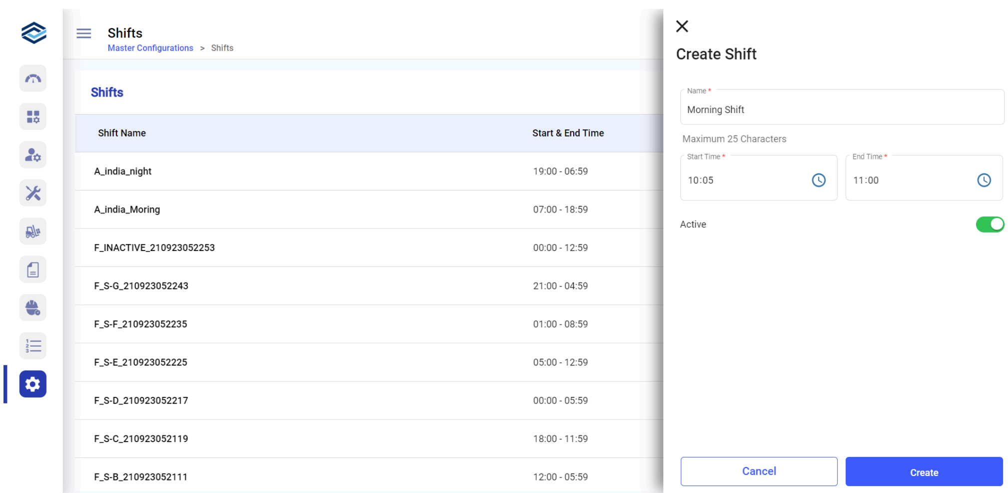
1. Click the **Master Configuration** module on the left side pane and click **Shifts**.

Figure 4-4 Shifts Screen



2. Click **Create New** and select **Add Manually**.

Figure 4-5 Add Shift Details



3. In the **Create Shift** window, enter shift details like **Name**, **Start Time**, **End Time**, and toggle **Active** to make the shift active.
4. Click **Create**.

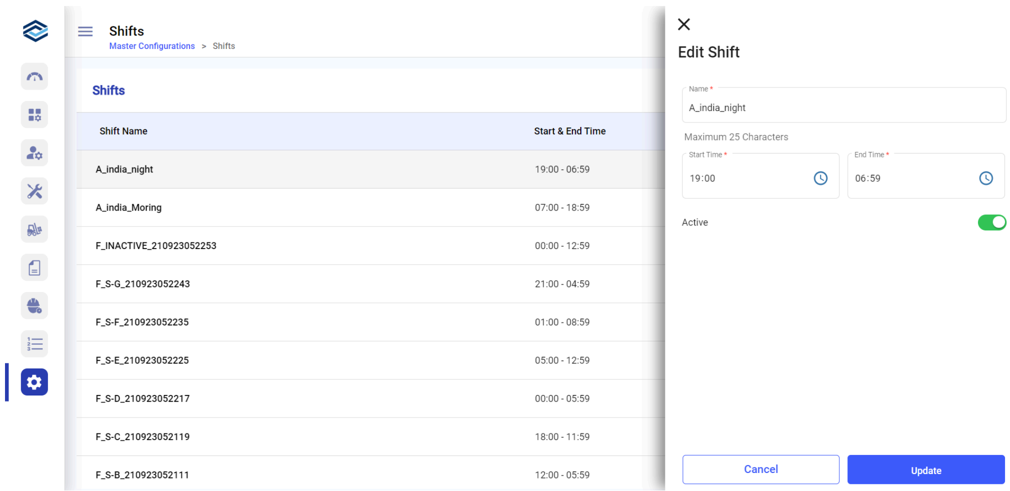
   The new shift is created successfully.

4.2.1. Modify Shift Master data

To modify shift master data:

1. In the **Shifts** screen, click the More icon against the plant that you want to edit and select **Edit**.
2. In the **Edit Shift** window, update the details as required and click **Update**.

Figure 4-6 Update Shift Details



Shift details are updated successfully.

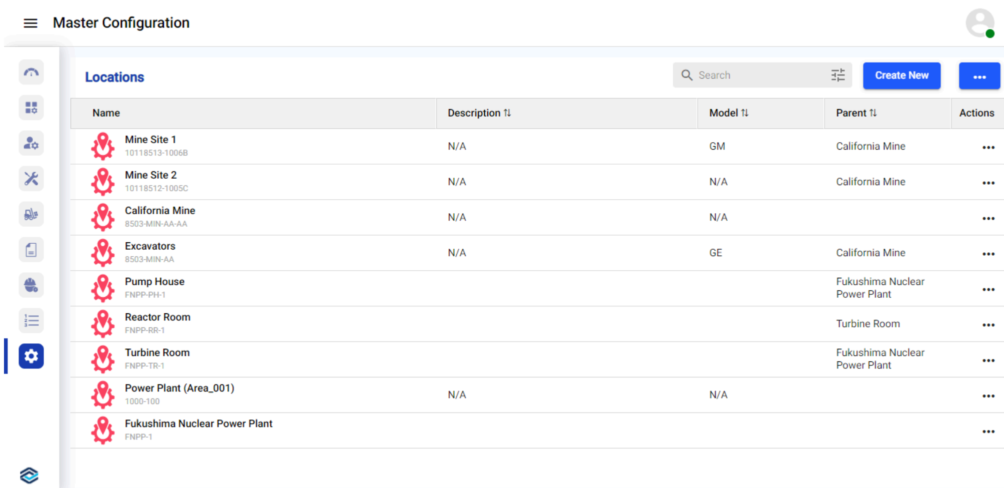
4.3. Create Location Master data

Create asset location data which can be used while creating rounds or inspections or you can download already created data from SAP through synchronization.

To create or add a location data:

1. Click the **Master Configuration** module on the left side pane and click **Locations**.

   Figure 4-7 Locations Screen

2. Click **Create New** and select **Add Manually**.

   Or

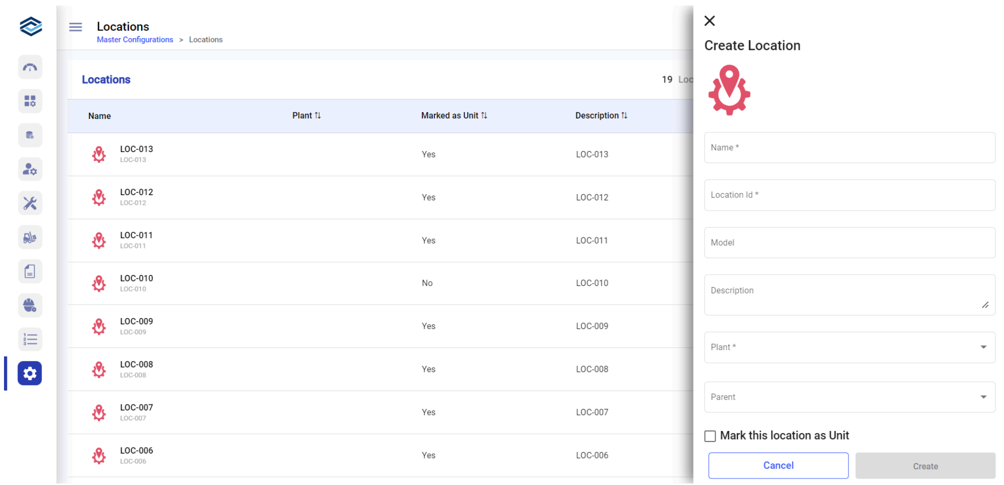
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   Or

   The data synchronization can automatically occurs based on the configured schedule.

> **Note:**
> There should not be any existing master data to sync the data.

Figure 4-8 Add Location Details



3. In the **Create Location** window, enter location details like **Name**, **Location Id**, **Model**, **Description**, **Plant**, and **Parent**.

> **Note:**
> If the Location ID already exists, an error message “Location ID <> already exists” is displayed. Use another ID.

4. Select the **Mark this location as Unit** to assign users, round plans, and shift handovers at unit level.
5. Click **Create**.

The new location is created successfully.

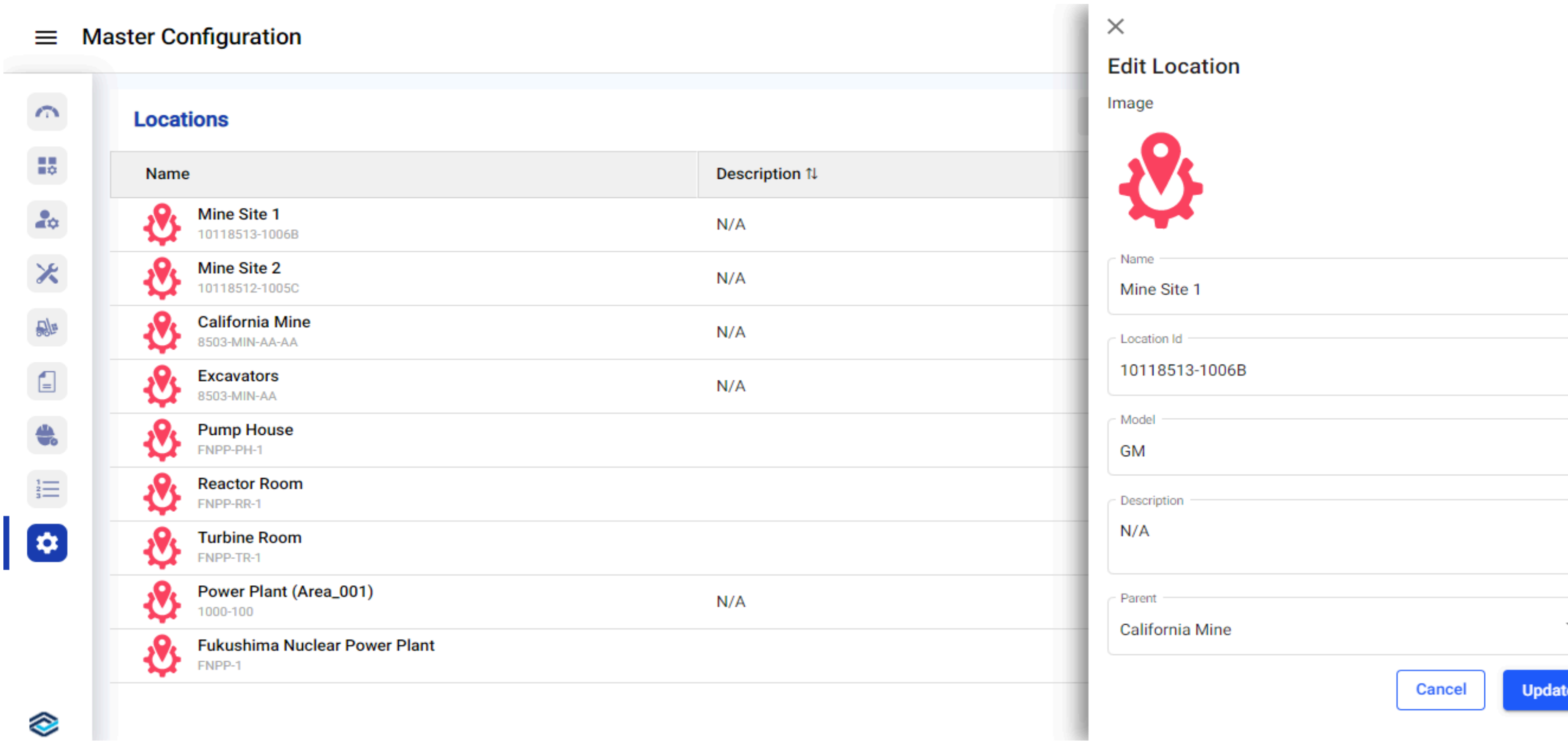
> **Note:**
> You can download the location template using More icon (next to **Create New**) > **Download Template**.

4.3.1. Modify Location Master Data

To modify location master data:

1. In the **Locations** screen, click the More icon against the location that you want to edit and select **Edit**.
2. In the **Edit Location** window, update the details as required and click **Update**.

Figure 4-9 Update Location Details



Location details are updated successfully.

4.3.2. Bulk upload Location Master data

When you want to create many locations, you can bulk upload the master data for location by uploading an excel sheet with the location details. The name of the excel sheet must be *Bulk Upload - Location Template.xlsx*.

To bulk upload locations:

1. Click **Locations**.
2. Click **Create New** and select **Upload Excel**.
3. In the Choose file to upload window, select a file from the folder.
4. Click **Upload** to add location excel sheet.

   The file is uploaded successfully. You can open it and update the details as required.

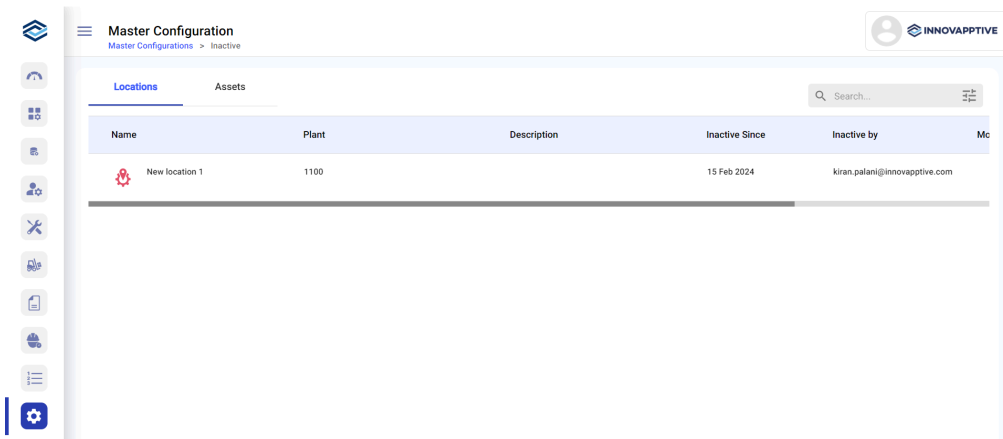
4.3.3. Deactivate Location Master Data

To deactivate location master data:

1. In the **Locations** screen, click the More ••• icon against the location that you want to deactivate and select **Deactivate**.
2. In the **Confirmation Deactivation** pop-up, click **Yes**.

   The location is deactivated. You can see the deactivated location in the **Inactive** module under the **Locations** tab.

Figure 4-10 Deactivated Location



> **Note:**
> - If the location has any child locations or assets, you cannot deactivate it until the child locations or assets are deactivated. Click the **Show** button on the pop-up to see the hierarchy.
> - If the location is used in the rounds, issues, or actions, it is removed from the rounds, issues, or actions where it is currently used.

4.4. Create Asset Master data

Create asset master data that can be used for creating rounds or inspections or you can export the already created data from SAP by synching.

To create or add an asset data:

1. Click the **Master Configuration** module on the left-side pane and click **Assets**.

   Or

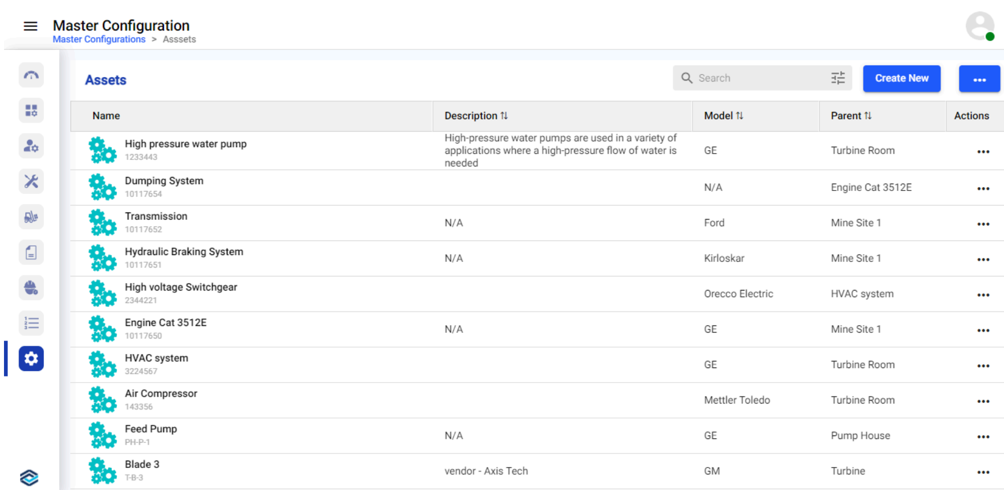
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   Or

   The data synchronization can automatically occurs based on the configured schedule.

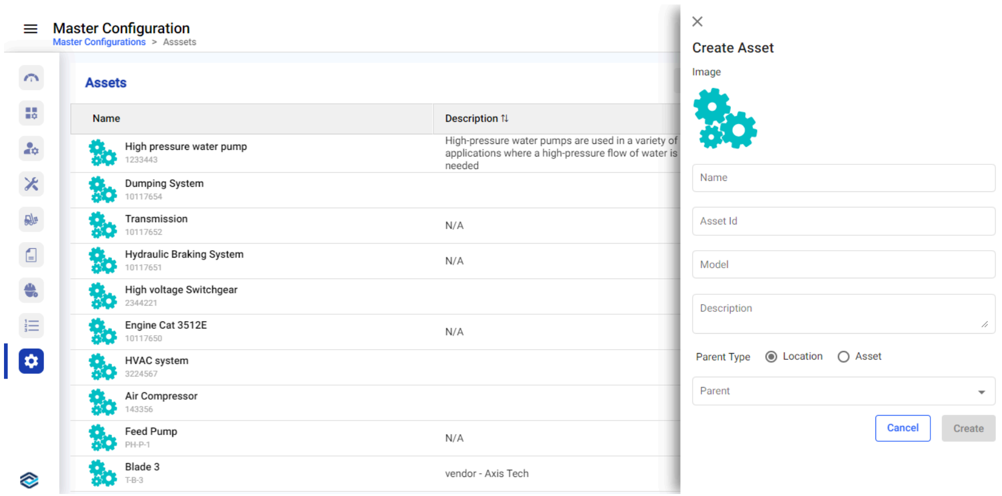
> **Note:**
> There should not be any existing master data to sync the data.

Figure 4-11 Assets Screen



2. Click **Create New** and select **Add Manually**.

Figure 4-12 Add Asset Details



3. In the **Create Asset** window, enter asset details like **Name**, **Asset Id**, **Model**, **Description**, **Parent Type**, and **Parent**.

> **Note:**
> If the Asset ID already exists, an error message “Asset ID <> already exists” is displayed. Use another ID.

4. Click **Create**.

   The new asset is created successfully.

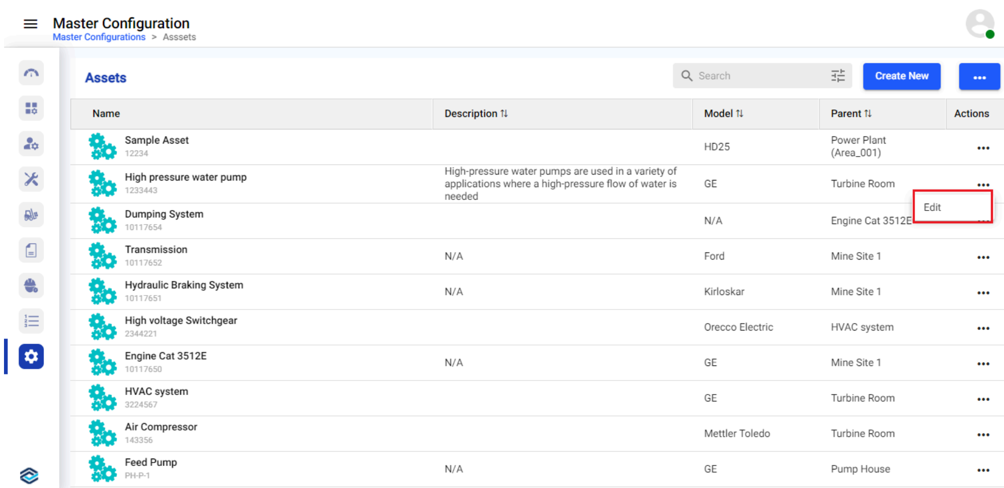
> **Note:**
> You can download the asset template using More icon (next to **Create New**) › **Download Template**.

4.4.1. Modify Asset Master Data

To modify asset master data:

1. In the **Assets** screen, click the More ••• icon against the asset that you want to edit and select **Edit**.

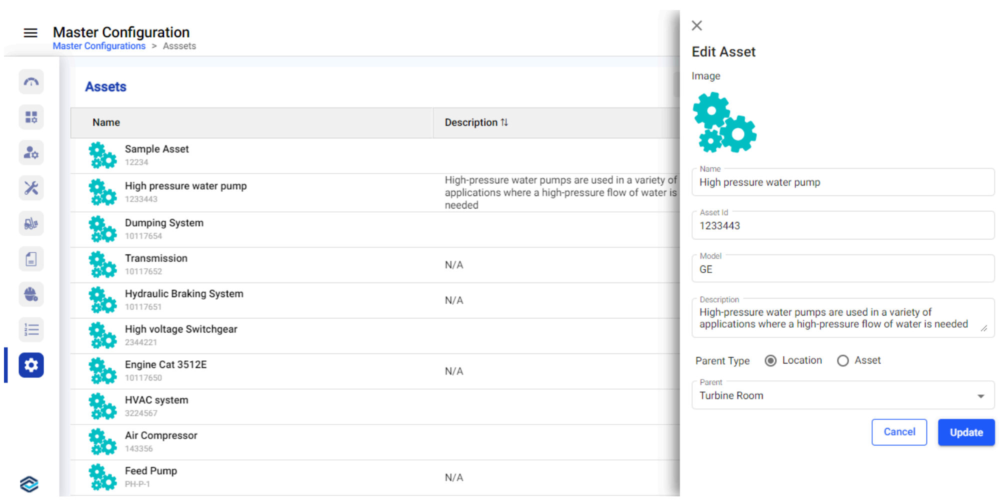
Figure 4-13 Select Edit



> **Note:**
> You can just select the asset, the asset details are displayed on the right-side window, click **Edit** to update the details.

2. In the **Edit Asset** window, update the details as required and click **Update**.

Figure 4-14 Update Asset Details



Asset details updated successfully.

4.4.2. Bulk upload Asset Master data

When you want to create many assets, you can bulk upload the master data for asset by uploading an excel sheet with the asset details. The name of the excel sheet must be *Bulk Upload - Asset Template.xlsx*.

To bulk upload assets:

1. Click **Assets**.
2. Click **Create New** and select **Upload Excel**.
3. In the Choose file to upload window, select a file from the folder.
4. Click **Upload** to add asset excel sheet.
   The file is uploaded successfully. You can open it and update the details as required.

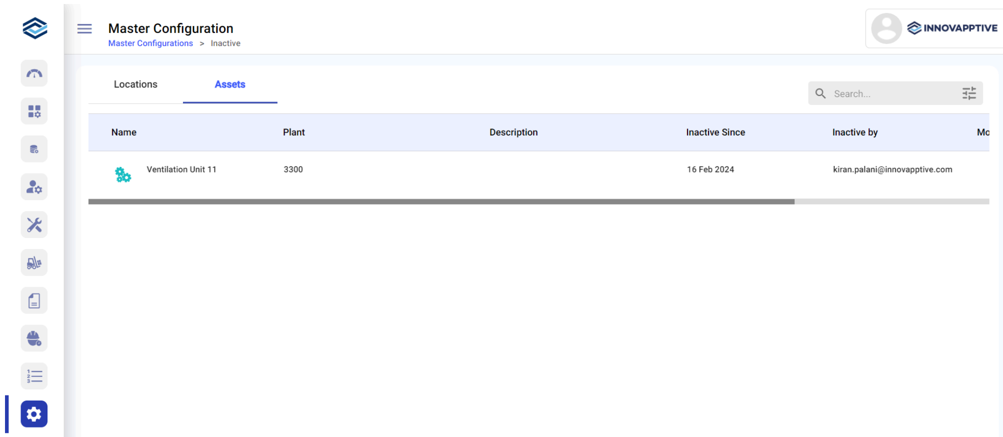
4.4.3. Deactivate Asset Master Data

To deactivate asset master data:

1. In the **Assets** screen, click the More *** icon against the asset that you want to deactivate and select **Deactivate**.
2. In the **Confirmation Deactivation** pop-up, click **Yes**.

   The asset is deactivated. You can see the deactivated asset in the **Inactive** module under the **Assets** tab.

Figure 4-15 Deactivated Asset



Note:
- If the asset has any child assets, you cannot deactivate it until the child assets are deactivated. Click the **Show** button on the pop-up to see the hierarchy.
- If the asset is used in the rounds, issues, or actions, it is removed from the rounds, issues, or actions where it is currently used.

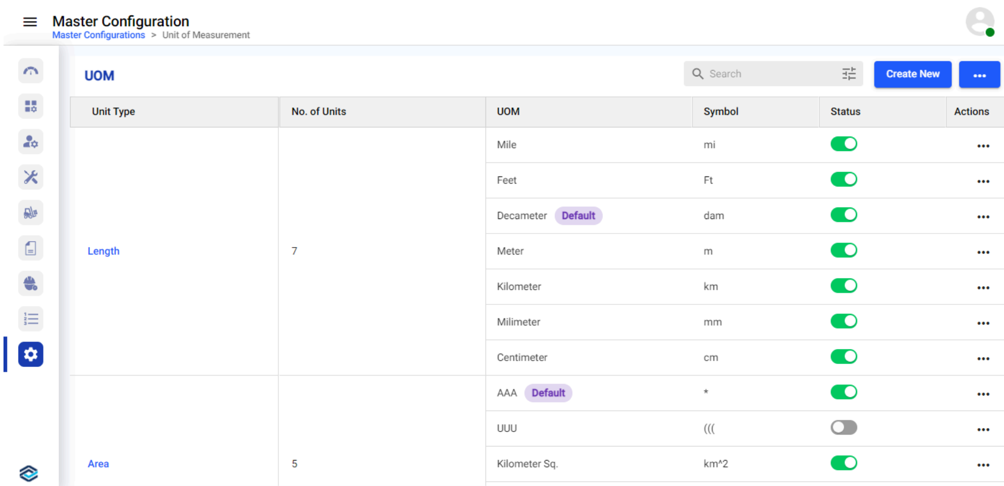
4.5. Create Unit of Measurement Master data

You can add Unit of Measurement (UOM) for the operator to capture readable responses for various measurements/readings in forms. You need to define, create a symbol, and describe the unit of measurement.

To add a unit of measurement:

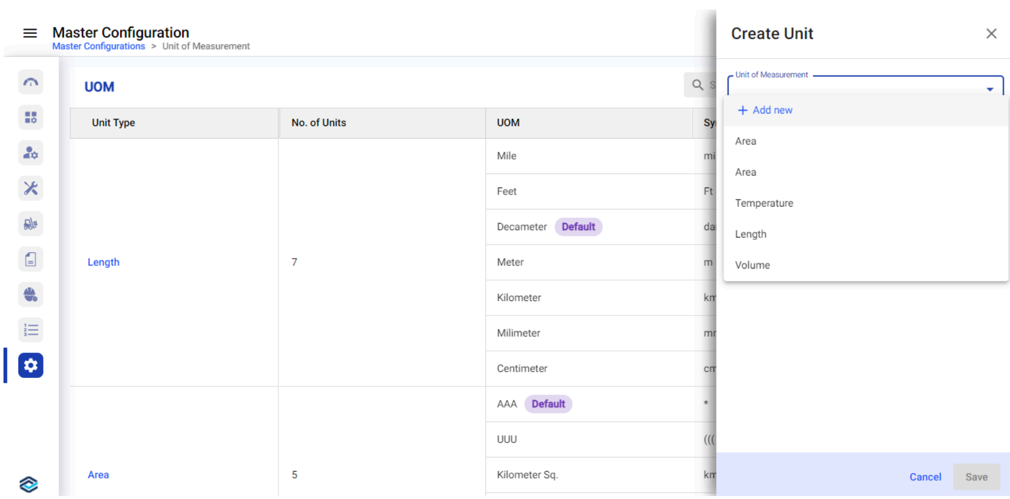
1. Click the **Master Configuration** module on the left side pane and click **Unit of Measurement**.

Figure 4-16 UOM Screen



2. Click **Create New** and select **Add Manually**.
3. In the **Create Unit** window, select the measurement in the **Unit of Measurement** drop-down for which you want to determine units.

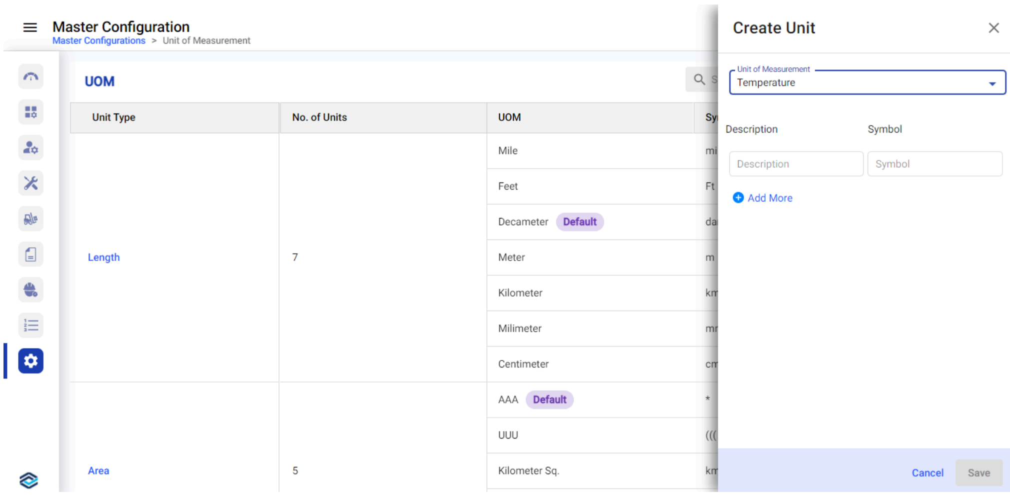
Figure 4-17 Create UOM



> **Note:**
> If the measurement that you need is not present in the list, click **+Add New** and enter **Unit Type**.

4. Enter **Description**, and **Symbol**.

Figure 4-18 Add UOM Details



Note:
Click **Add More** to add more descriptions and symbols.

5. Click **Save**.

   The unit of measurement is created successfully.

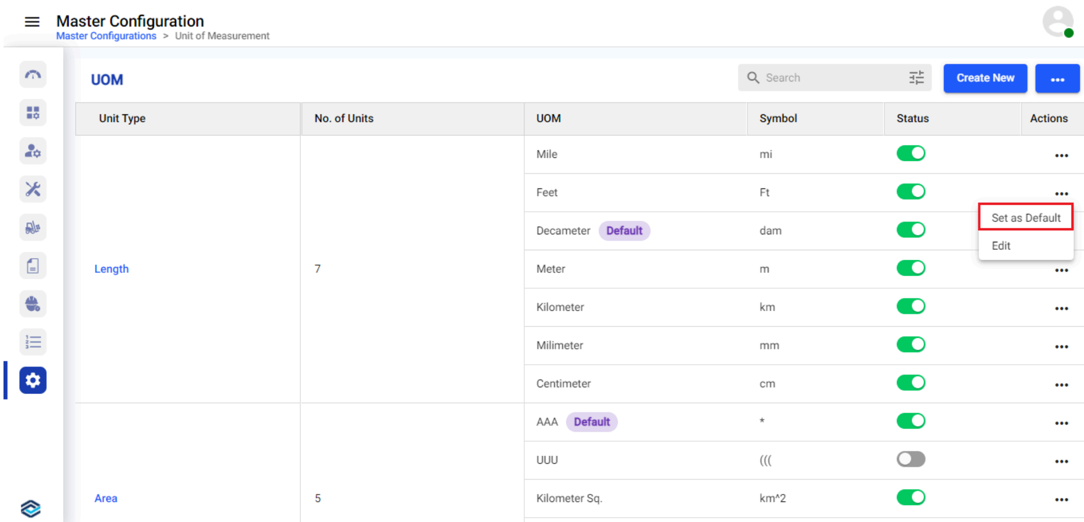
Note:
You can download the UOM template using More icon (next to **Create New**) > **Download Template**.

4.5.1. Set default Unit of Measurement

To set a unit of measurement as default:

In the **UOM** screen, click the More ••• icon against the UOM that you want to set as default and select **Set as Default**.

Figure 4-19 Set UOM as Default



The selected UOM is set as default successfully.

4.5.2. Activate and deactivate Unit of Measurement

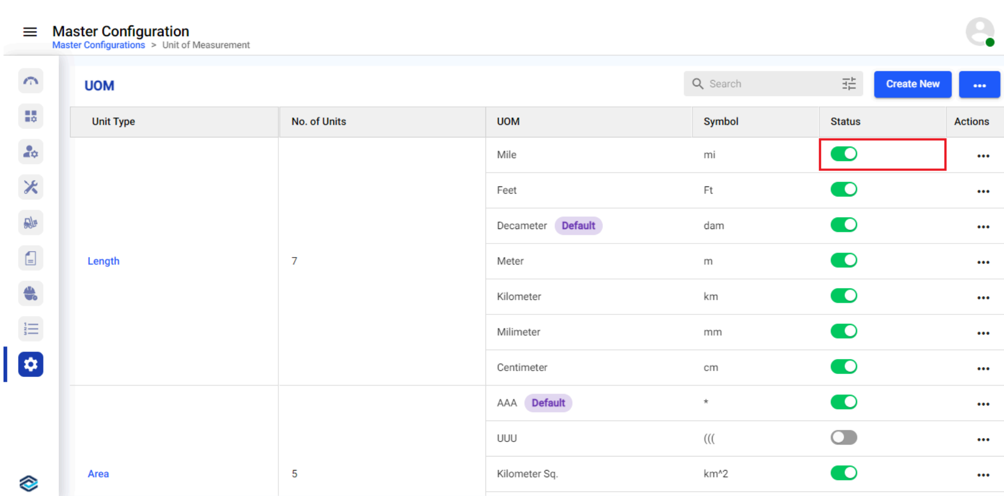
To activate/deactivate unit of measurement:

1. Toggle ON the **Status** to active for form authors and supervisors to include the unit of measurement while creating forms and forms.

   A message UOM status changed successfully appears.

2. Toggle OFF the **Status** to deactivate the unit of measurement.

Figure 4-20 Activate or Deactivate UOM

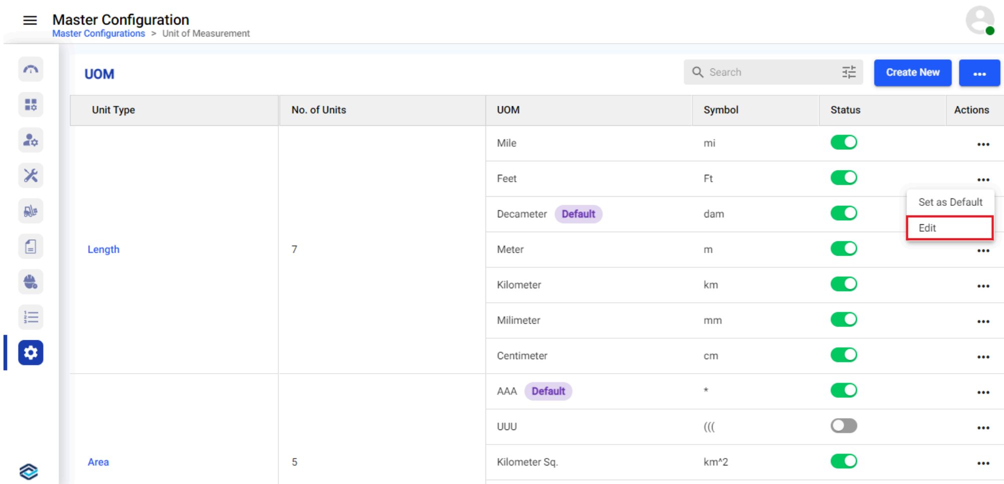


4.5.3. Modify Unit of Measurement

To modify unit of measurement:

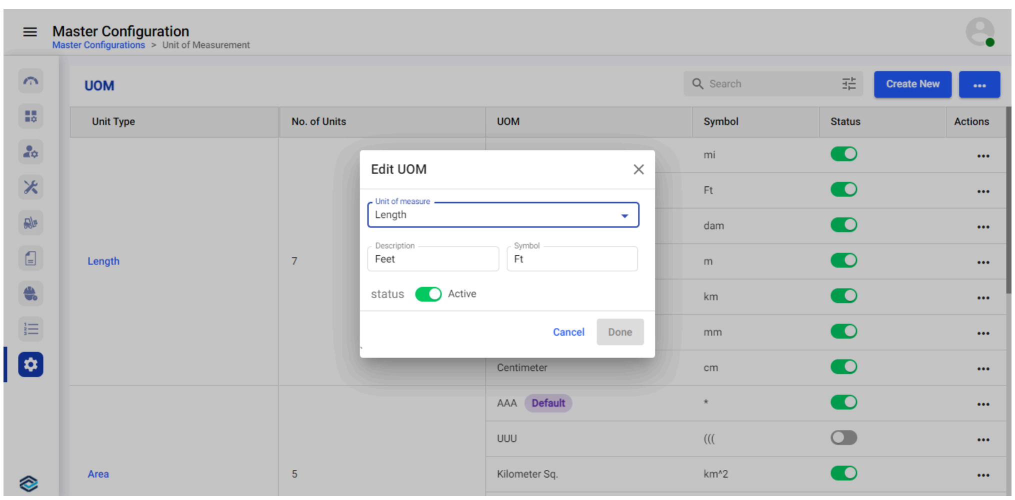
1. In the **Unit of Measurement** screen, click the More ••• icon against the UOM that you want to edit and select **Edit**.

Figure 4-21 Select Edit



2. In the **Edit UOM** window, update the details as required and click **Done**.

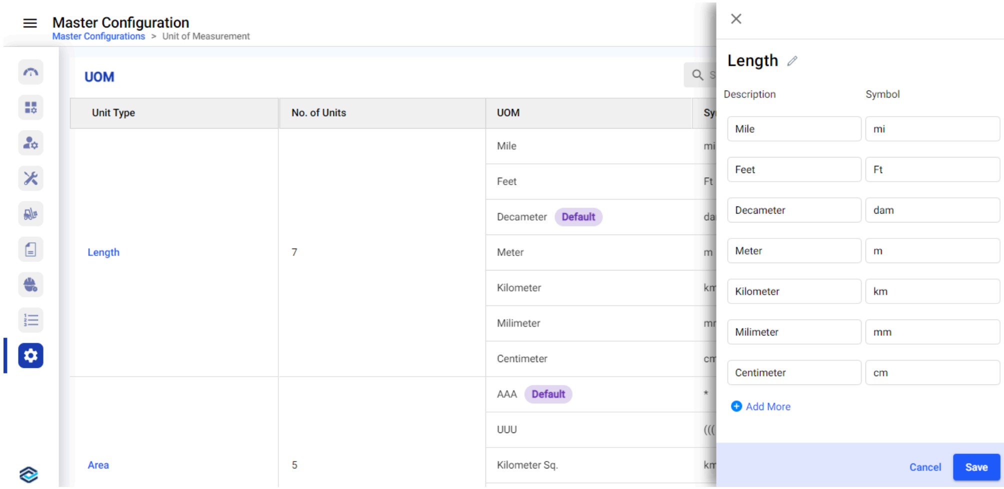
Figure 4-22 Update UOM Details



Unit of measurement details are updated successfully.

Note:
To update **Unit Type**, click on the unit type, update the required details on the right-side window, and click **Save**.

Figure 4-23 Update Unit Type



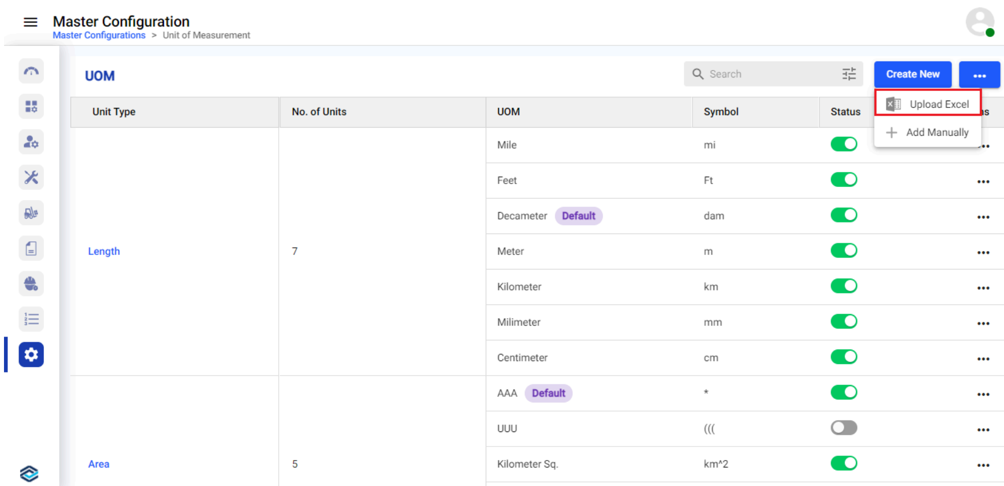
4.5.4. Bulk upload Unit of Measurement Master data

When you want to create many units of measurements, you can bulk upload the master data for UOM by uploading an excel sheet with the details of the unit of measurement, unit of measurement type and symbol to avoid repetitive activity. The name of the excel sheet must be *Bulk Upload - UOM Template.xlsx*.

To bulk upload UOM:

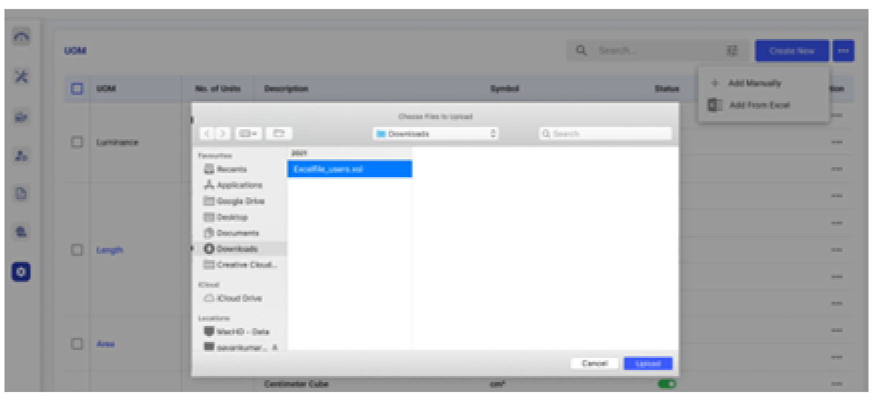
1. Click **Unit of Measurement**.
2. Click **Create New** and select **Upload Excel**.

Figure 4-24 Select Upload Excel



3. In the Choose file to upload window, select a file from the folder.

Figure 4-25 UOM Excel Sheet



4. Click **Upload** to add UOM excel sheet.

   The file is uploaded successfully. You can open it and update the details as required.

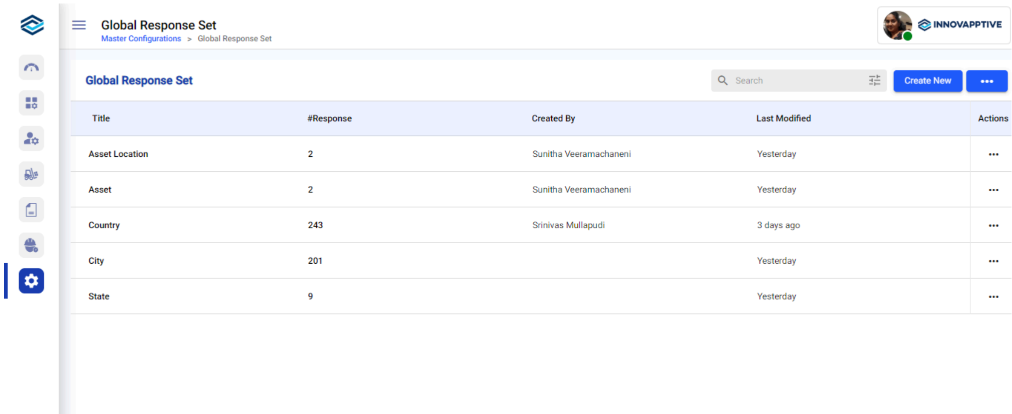
4.6. Create Global Response Set data

You can add a Global Response Set for the technician or operator to capture different types of responses for various questions or tasks in forms and round plans. For example, if the Response Set is created for Country, then the responses are all the countries that can be selected from the drop-down.

To create or add global response set data:

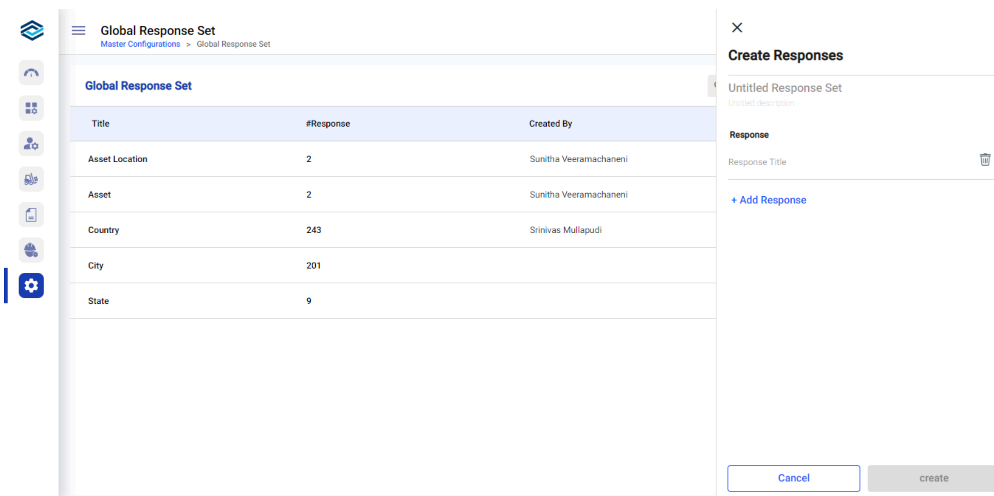
1. Click the **Master Configuration** module on the left-side pane and click **Global Response Set**.

Figure 4-26 Global Response Set Screen



2. Click **Create New** and select **Add Manually**.

Figure 4-27 Add Global Set Response Details



3. In the **Create Responses** window, enter the title for the response set and add response titles. Click **Add Response** to add more response sets.

> **Note:**
> You can sort Global Response values in both ascending order ("A to Z") and descending order ("Z to A").

4. Click **Apply**.

   The response set is created successfully.

> **Note:**
> You can download the global response set template using More icon (next to **Create New**) > **Download Template**.

4.6.1. Modify Global Response Set Data

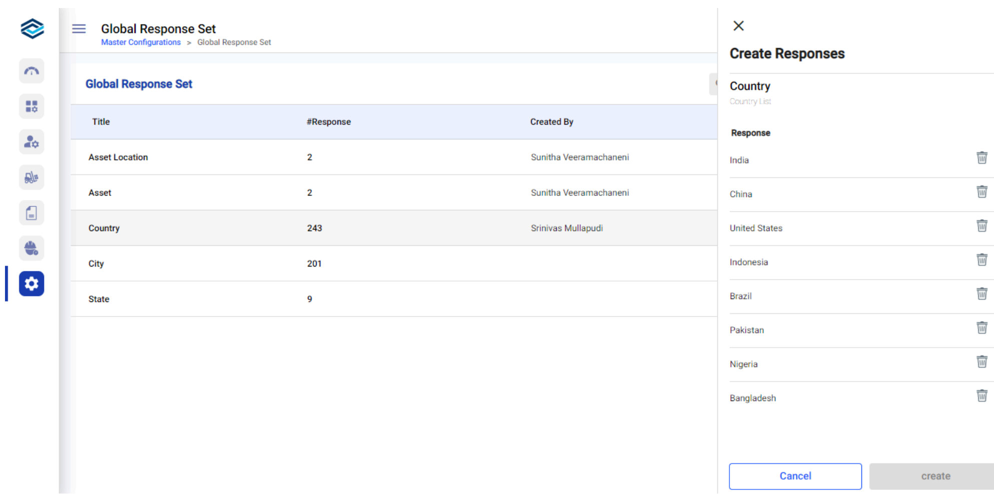
To edit global response set master data:

1. In the **Global Response Set** screen, click the More ••• icon against the response type that you want to edit and select **Edit**.

> **Note:**
> You can just select the response type, the response type details are displayed on the right-side window, click **Edit** to update the details.

2. In the **Edit Responses** window, update the details as required and click **Update**.

Figure 4-28 Update Global Response Set Details



Response set details are updated successfully.

> **Note:**
> When you update global responses, the responses in all associated forms are automatically updated.

4.6.2. Bulk upload Global Response Set data

When you want to create many response sets, you can bulk upload the master data for global response set by uploading an excel sheet with the response set details. The name of the excel sheet must be *Bulk Upload - Global Response Set Template.xlsx*.

To bulk upload response sets:

1. Click **Global Response Set**.
2. Click **Create New** and select **Upload Excel**.
3. In the Choose file to upload window, select a file from the folder.
4. Click **Upload** to add the response set excel sheet.
   The file is uploaded successfully. You can open it and update the details as required.

5. Onboarding Tenants/Super Admins

Use the **Tenant Management** module to create tenant or super admin roles for onboarded customers/user and provide access to the applications and modules.

As a CWP Admin, create a Tenant/Super Admin role for the user by collecting the details such as primary, ERP, resources, database configuration, collaboration, and configurations and assign all the required permissions to products and modules.

> **Note:**
> There should be only one Super Admin and the admin should have all the permissions to create, edit, delete, and so on.

In this module, you can,

- Select the relevant product such as mInventory and mWorkOrder using the **Product** drop-down.
- Search the admin roles using the **Search** bar.
- Create super admin roles using the **Add Tenant** button.
- Edit super admin roles using the More ••• icon > **Edit** option.
  You can edit the admin details. Select the admin in the Tenant Management screen and then click the **Edit** button on the right side or clicking the More ••• icon > **Edit** option in the Tenant Management screen.

  > **Note:**
  > Some fields are disabled to edit once the Tenant/Customer is onboarded.

- Sort the values such as Tenant and Created On using the Sort ⇅ icon next to the respective columns.

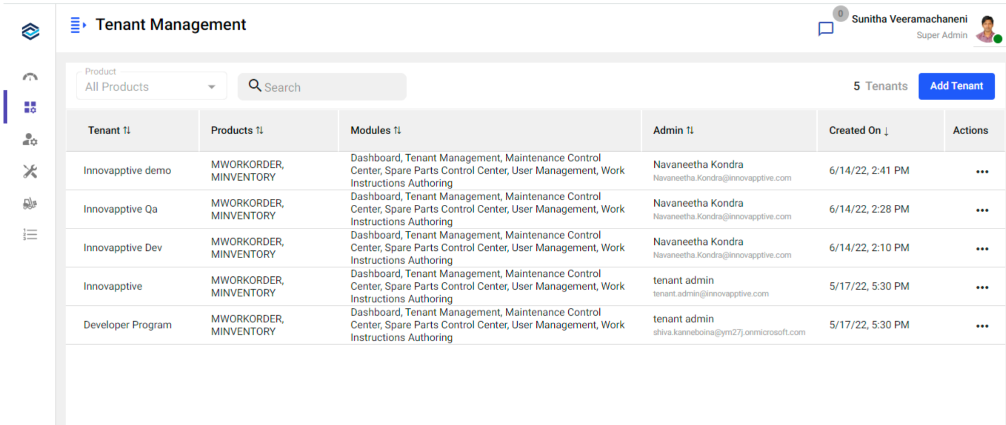
5.1. Create Tenant/Super Admin role

You can create a tenant/super admin role and provide access to relevant applications such as mWorkOrder and mInventory and the modules available in the CBO application.

To create a tenant/super admin role:

1. Click the **Tenant Management** module on the left side pane.

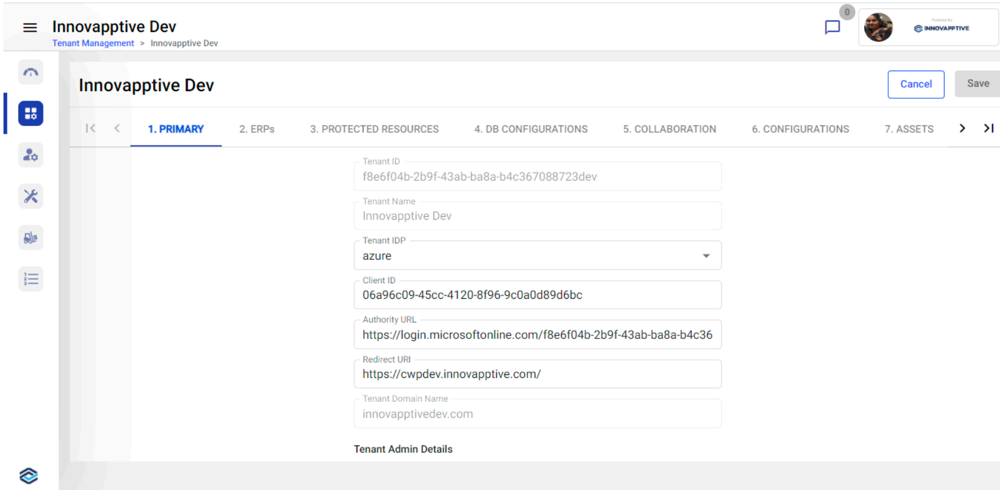
Figure 5-1 Tenant Management Module



2. Click the **Add Tenant** button on the right-side.
3. In the **Primary** tab, enter the following details:
   a. **Tenant ID** – enter the customer id.
   b. **Tenant Name** – enter the customer's name.
   c. **Tenant IDP** – select the value from the drop down.
   d. **Client ID** – enter the client id.
   e. **Authority URL** – enter the URL to which you want to provide access (for example, CWP application).
   f. **Redirect URI** – enter the URL to redirect.
   g. **Tenant Domain Name** – enter the customer domain name.
   h. In the **Tenant Admin Details** section, enter **First Name**, **Last Name**, **Title**, and **Email**.

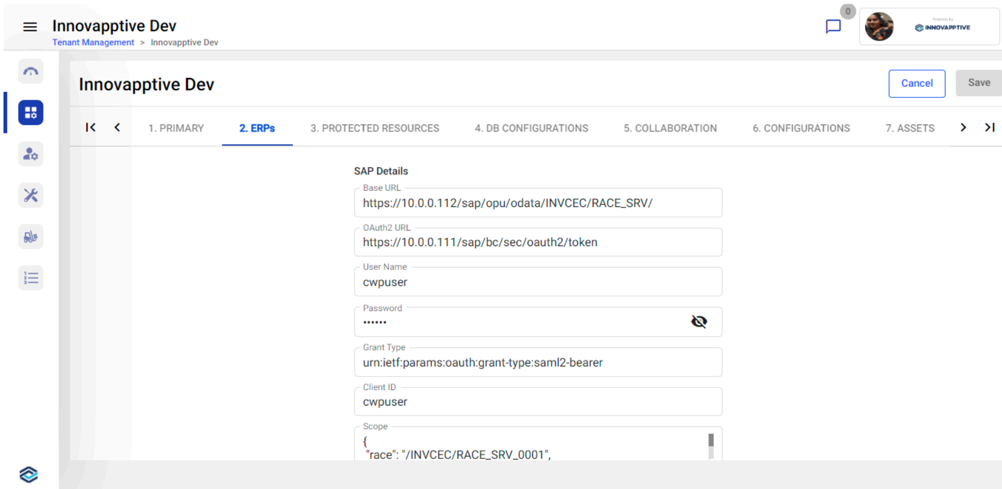
> **Note:**
> The email is valid based on the selected **Tenant IDP**.

Figure 5-2 Add Tenant Primary Details



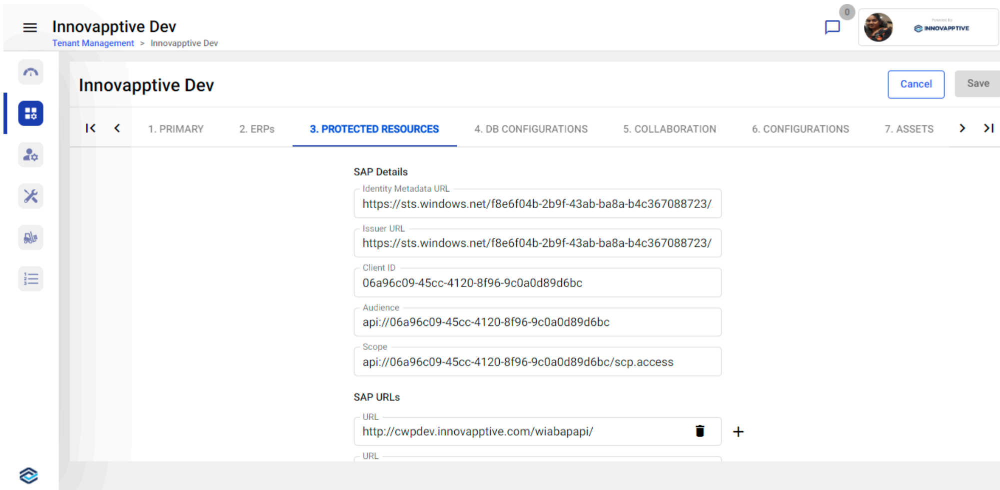
4. In the **ERPs** tab, do the following:
    a. In the **SAP Details** section, enter the following:
        i. **Base URL** – enter the relevant URL.
        ii. **OAuth2 URL** – enter the relevant URL.
        iii. **User Name** – enter the customer username.
        iv. **Password** – enter the customer password.
        v. **Grant Type** – enter the type.
        vi. **Client ID** – enter the client id.
        vii. **Scope** – enter the scope id.
    b. In the **SAP SAML Details** section, enter the following:
        i. **OAuth2 URL** – enter the relevant URL.
        ii. **Grant Type** – enter the type.
        iii. **Client Secret** – enter the client secret code.
        iv. **Resource** – enter the resource link.
        v. **Token Use** – enter the token id.
        vi. **Token Type** – enter the type of the token.

Figure 5-3 Add Tenant ERP Details



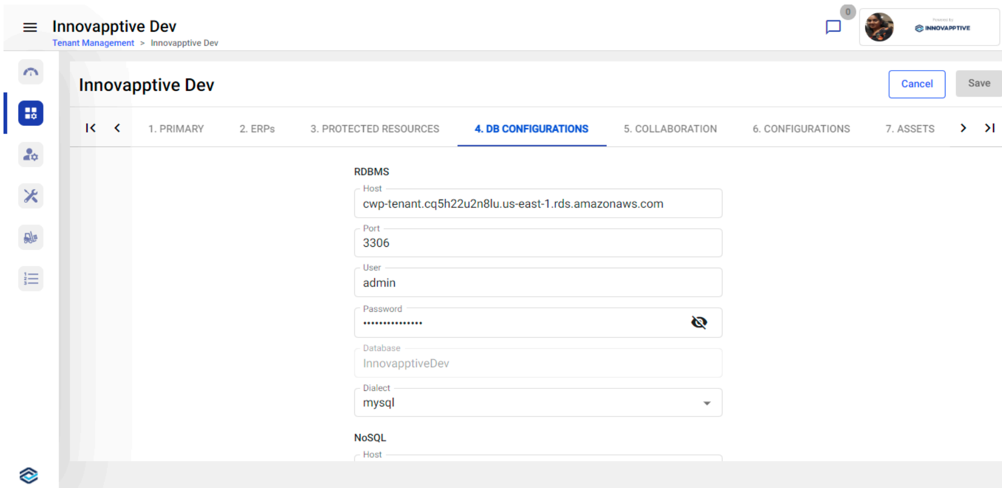
5. In the **Protected Resources** tab, do the following:
    a. In the **SAP Details** section, enter the following:
        i. **Identity Metadata URL** – enter the metadata URL.
        ii. **Issuer URL** – enter the issuer URL.
        iii. **Client ID** – enter the client id.
        iv. **Audience** – enter the audience id.
        v. **Scope** – enter the scope id.
    b. In the **SAP URLs** section, enter the relevant URLs.
    Click the **Add** icon to add extra fields.
    c. In the **Node Details** section, enter the following:
        i. **Identity Metadata URL** – enter the metadata URL.
        ii. **Issuer URL** – enter the issuer URL.
        iii. **Client ID** – enter the client id.
        iv. **Audience** – enter the audience id.
        v. **Scope** – enter the scope id.
    d. In the **Node URLs** section, enter the relevant URLs.
    Click the **Add** icon to add extra fields.

Figure 5-4 Add Tenant Resources Details

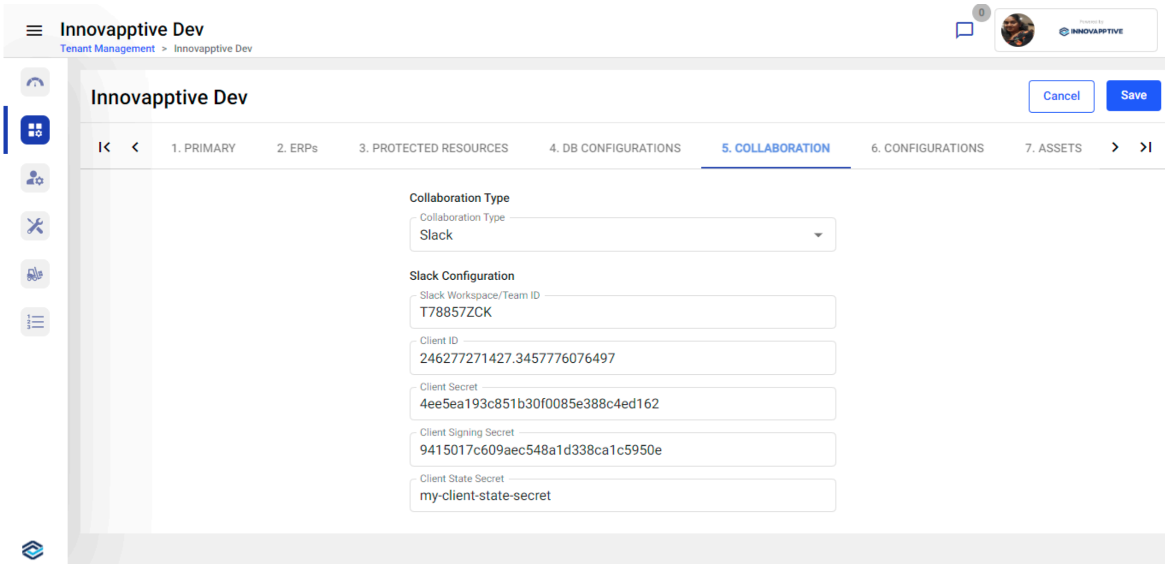


6. In the **DB Configurations** tab, enter the following:
    a. In the **RDBMS** section, enter the following:
        i. **Host** – enter the database host.
        ii. **Port** – enter the port number.
        iii. **User** – enter the username.
        iv. **Password** – enter the password.
        v. **Database** – fills automatically.
        vi. **Dialect** – select the value from the drop down.
    b. In the **NoSQL** section, enter the following:
        i. **Host** – enter the database host.
        ii. **Port** – enter the port number.
        iii. **User** – enter the username.
        iv. **Password** – enter the password.
        v. **Database** – fills automatically.

Figure 5-5 Add Tenant Database Details

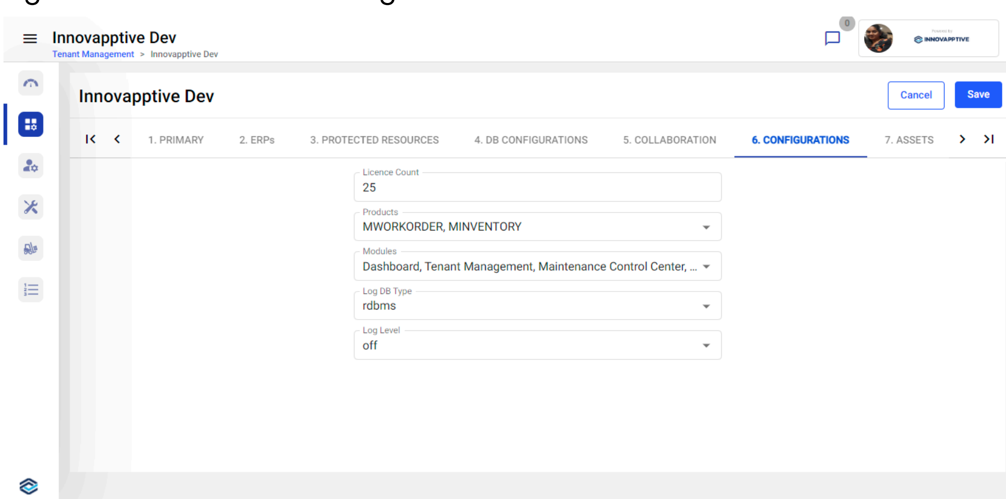


7. In the **Collaboration** tab, enter the following:
    a. **Collaboration Type** – select a collaboration type Slack or MS Teams to connect to the external chat application.
    b. If the **Collaboration Type** is **Slack**, enter the following:
        i. **Slack Workspace/Team ID**: enter slack workspace or team id.
        ii. **Client ID**: enter client id.
        iii. **Client Secret**: enter client secret code.
        iv. **Client Signing Secret**: enter client signing secret code.
        v. **Client State Secret**: enter client state secret code.
    c. If the **Collaboration Type** is **MS Teams**, enter the following:
        i. **Tenant ID**: enter onboard tenant id.
        ii. **Client ID**: enter client id.
        iii. **Client Secret**: enter client secret code.
        iv. **Share Point Site ID**: enter share point site id.
        v. **Private Key**: enter RSA private key.
        vi. **Public Key**: enter RSA public key.



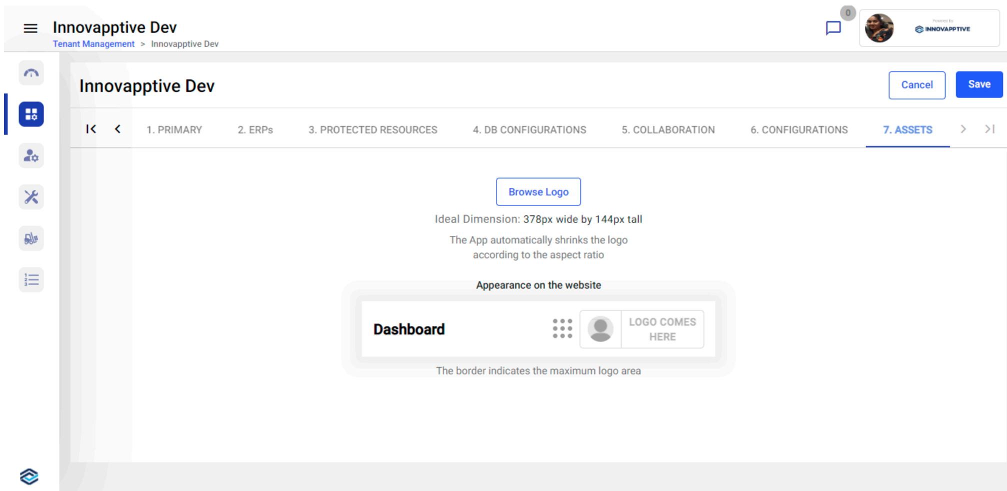
8. In the **Configurations** tab, enter the following:
    a. **License Count** – enter the count of the licenses that are provided to the tenant.
    b. **Products** – select the products that are assigned to the tenant from the drop down.
    c. **Modules** – select the modules that are assigned to the tenant from the drop down.
    d. **Log DB Type** – select the relevant database type from the drop down.
    e. **Log Level** – select the level from the drop down.

Figure 5-6 Add Tenant Configuration Details



9. In the **Assets** tab, use the **Browse Logo** button to change the logo on top right.

Figure 5-7 Add Logo



10. Click the **Save** button.

    The tenant/super admin is created successfully, and you can access and edit it from the **Tenant Management** screen.

6. Onboarding Users and Assigning Roles

Use the **User Management** module to create roles and so on, create users, and assign relevant roles to the users.

Once the Innovapptive Admin create the admin role and hand over it to you, as an onboarded tenant/super admin, you can create roles required for the CBO application such as Manager, Supervisor, Developer, and so on, create users and assign the relevant roles and permissions to the modules available in the application.

In this module, you can,

- Search users using the **Search** bar.
- Create users using the **Add User** button.
- Sort the values such as User, Role, Email, and Created AT using the Sort ⇅ icon next to the columns.
- Group the roles using the More ••• icon > **Group Rows by this Column** option next to the Role column.
- Edit the users using the More ••• icon > **Edit** option.
- Deactivate users using the More ••• icon > **Deactivate** option or you can deactivate all the users at a time by selecting the check box and then selecting the More ••• icon > **Deactivate** option on the right.
- You can see the active users by accessing the **Active Users** sub-module and inactive users by accessing the **Inactive Users** sub-module on the left-side pane.

> **Note:**
> You cannot edit or deactivate the user if the role is Super Admin.

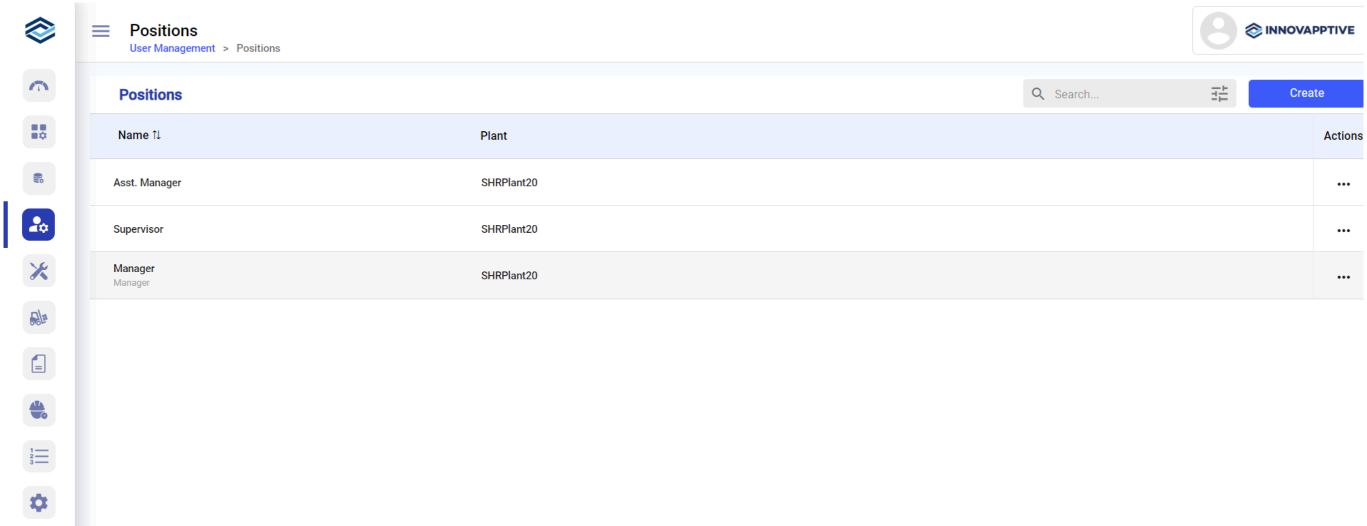
6.1. Create Positions

Learn how to create a position and assign it to a user. Use the Positions sub module to create a position.

To create a position:

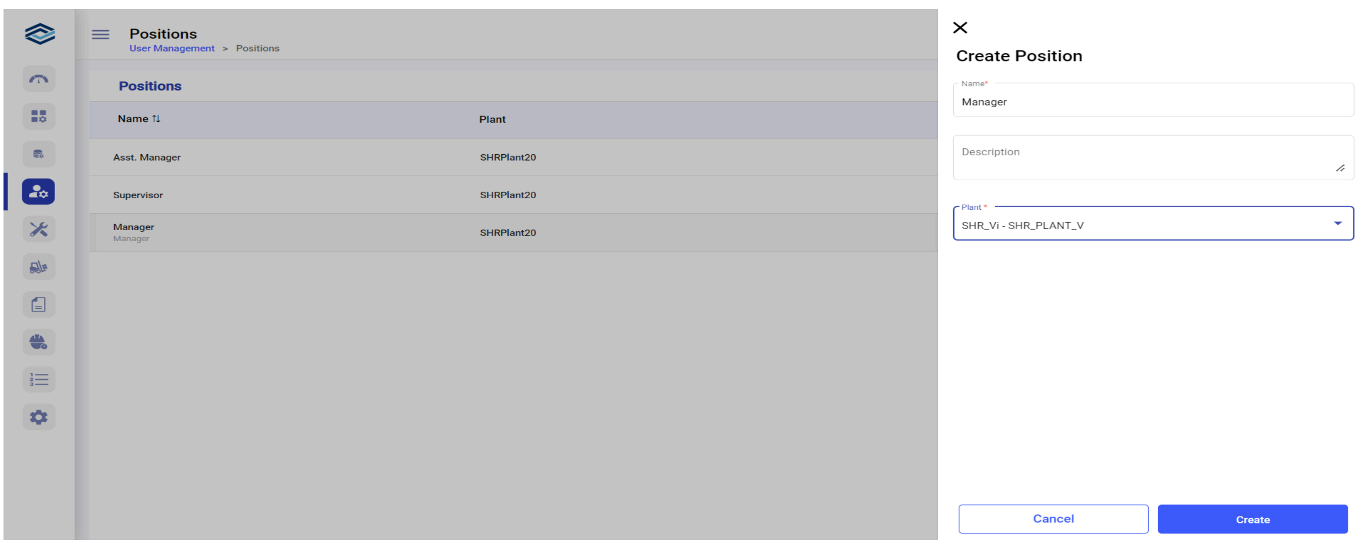
1. Click **Positions** on the left-side pane.

Figure 6-1 Positions Screen



2. Click the **Create** button on the top right.

Figure 6-2 Create Position



3. In the **Create Position** window, do the following:
    a. Enter the position name in the **Name** field.
    b. Enter the description of the position in the **Description** field.
    c. Select the plant from the **Plant** drop-down.
    d. Click the **Create** button.

The position is created and it is displayed in the **Positions** screen.

In this screen, you can,

- Search the positions using the Search bar.
- Filter the positions based on Plant.
- Edit the position using the **More** icon > **Edit** next to the position.

6.2. Create Roles and Assign Permissions

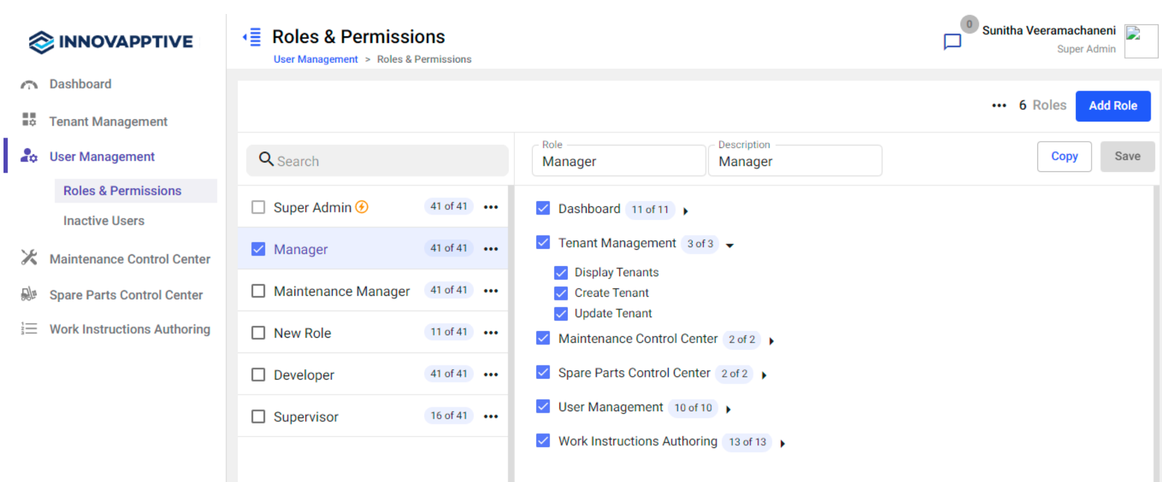
Use the **Roles and Permissions** sub module to create roles and assign relevant permissions.

To create a role and assign permissions:

1. Click the **Roles and Permissions** on the left-side pane.

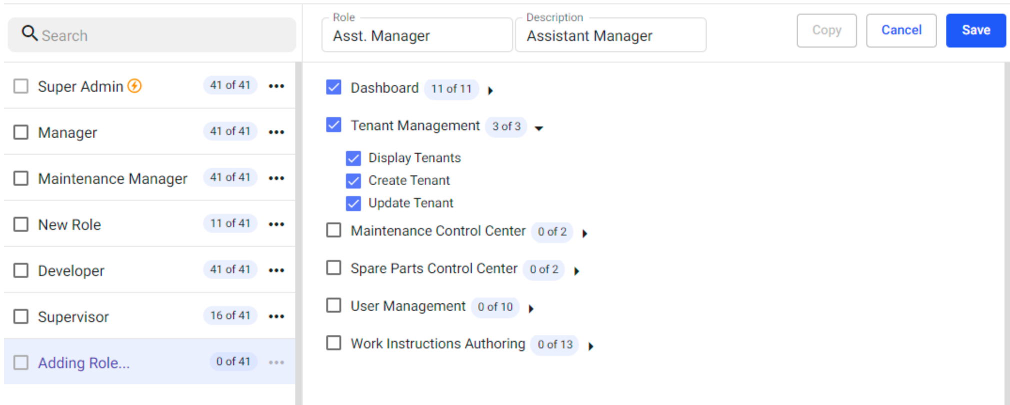
> **Note:**
>
> To see the Roles & Permissions module, click the Hamburger menu on the top left and then click the Expand icon next to User Management.

Figure 6-3 Roles and Permissions Screen



2. Click the **Add Role** button on the top right.
3. Do the following in the right section:
   a. Enter the role name in the **Role** field.
   b. Enter the description of the role in the **Description** field.
   c. Select the modules that are required for the role.
      Expand the down arrow icon to select the sub-modules.

Figure 6-4 Add Role Details



4. Click the **Save** button.

   The role is created and you can see it on the left section.

   In this sub module, you can,

   - Search the roles using the **Search** bar on the left-side section.
   - Copy the role using the More ••• icon > **Copy** option to create a new role from the existing role on the left-side section.

     > **Note:**
     > You can even select the **Copy** option on the right-side section to copy.

   - Delete the role using the More ••• icon > **Delete** option on the left-side section or you can delete all the roles at a time by selecting the check boxes and then selecting the More ••• icon > **Delete** option on the right.

     > **Note:**
     > - You cannot edit or delete the Super Admin role. You can only copy.
     > - You cannot delete the role which is already assigned to the user.

   - Add a role using the **Add Role** button on the right side.
   - Edit the role details or permissions on the right side.

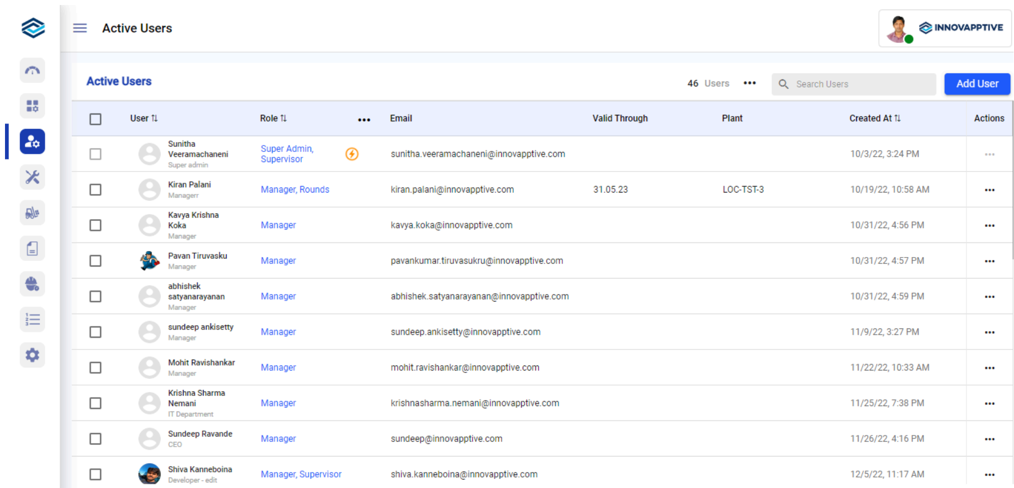
6.3. Add Users and Assign Roles

Learn how to create a user and assign the relevant role to the user.

To create a user and assign a role:

1. Click the **Active Users** under the **User Management** module on the left side pane.

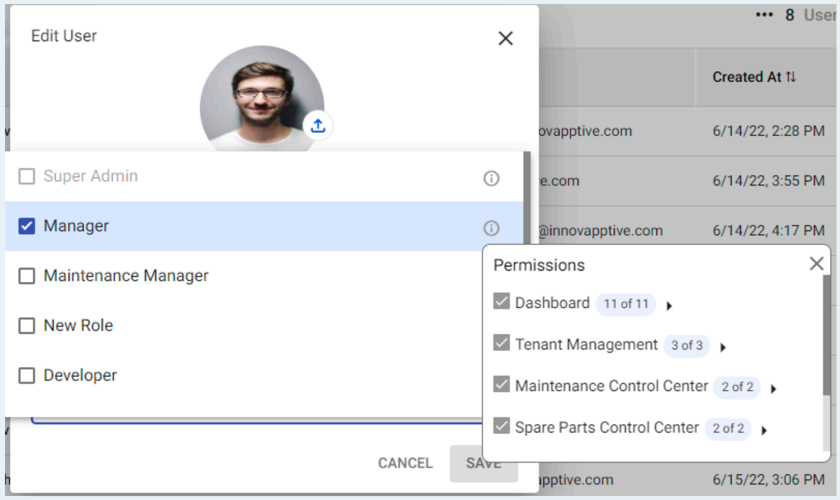
Figure 6-5 User Management Module



2. Click the **Add User** button on the right.
3. In the **Add User** window, do the following:
   a. Add the photo of the user.
   b. Enter the first name of the user in the **First Name** field.
   c. Enter the last name of the user in the **Last Name** field.
   d. Enter the title of the user in the **Title** field.
   e. Enter the mail id of the user in the **Email** field.
   f. Select the relevant role from the **Roles** drop down.

> **Note:**
> You can click the More Info icon to check the permissions assigned to the particular role.

Figure 6-6 Check Permissions



g. Select the user group from the **User Group** drop-down.

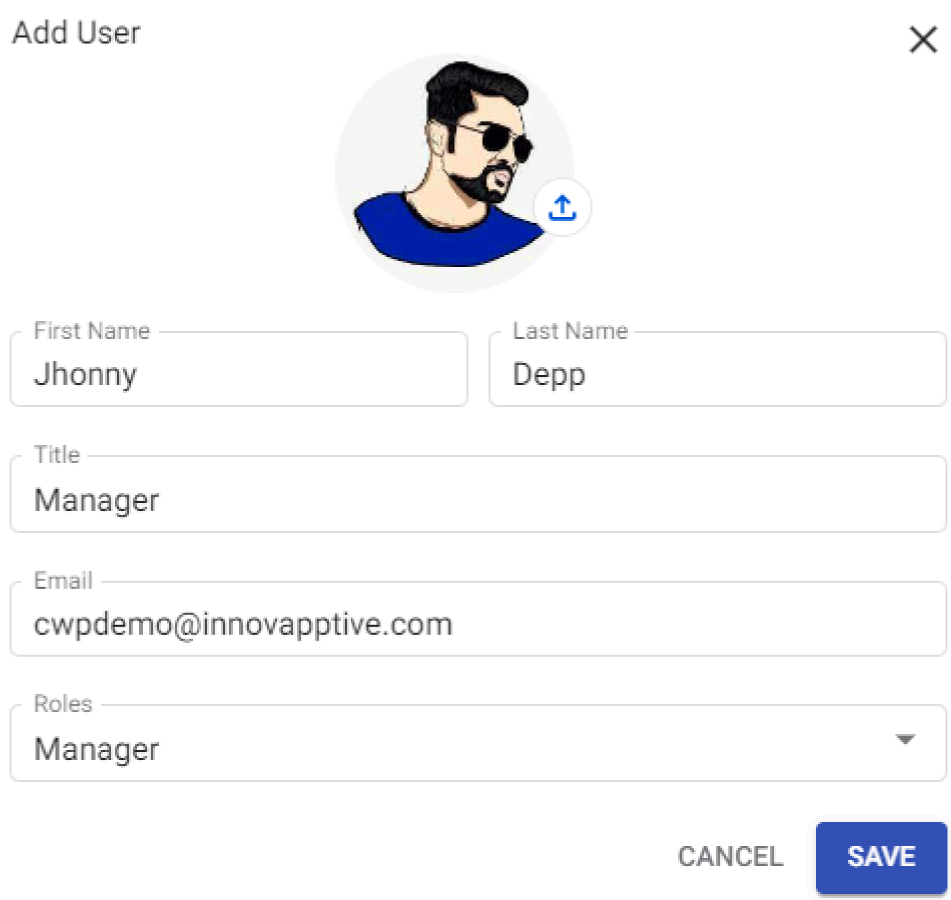
h. Select the dates from the **Valid From** and **Valid Through** calendars.

i. Select the plants from the **Plant** drop-down.

> **Note:**
> You can select more than one plant for a user. This enables the user to view rounds assigned to the user from multiple plants.

j. Select the unit from the **Unit** drop-down.
k. Select the position from the **Position** drop-down.
l. Click the **Add User** button.

Figure 6-7 Add User Details



User is created successfully. You view the newly added users list in the **Active Users** screen. To download the users list in excel format, click the More icon > select **Download Users List**.

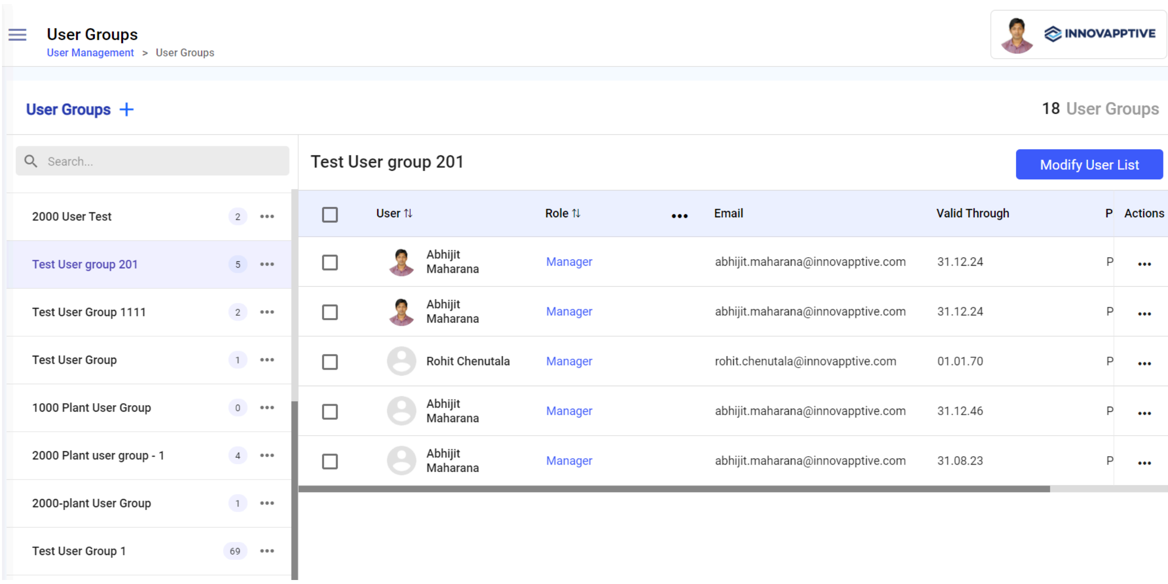
6.4. Create User Groups and Add Users

Use the **User Groups** sub module to create user groups and assign users.

To create a user group and assign it to user:

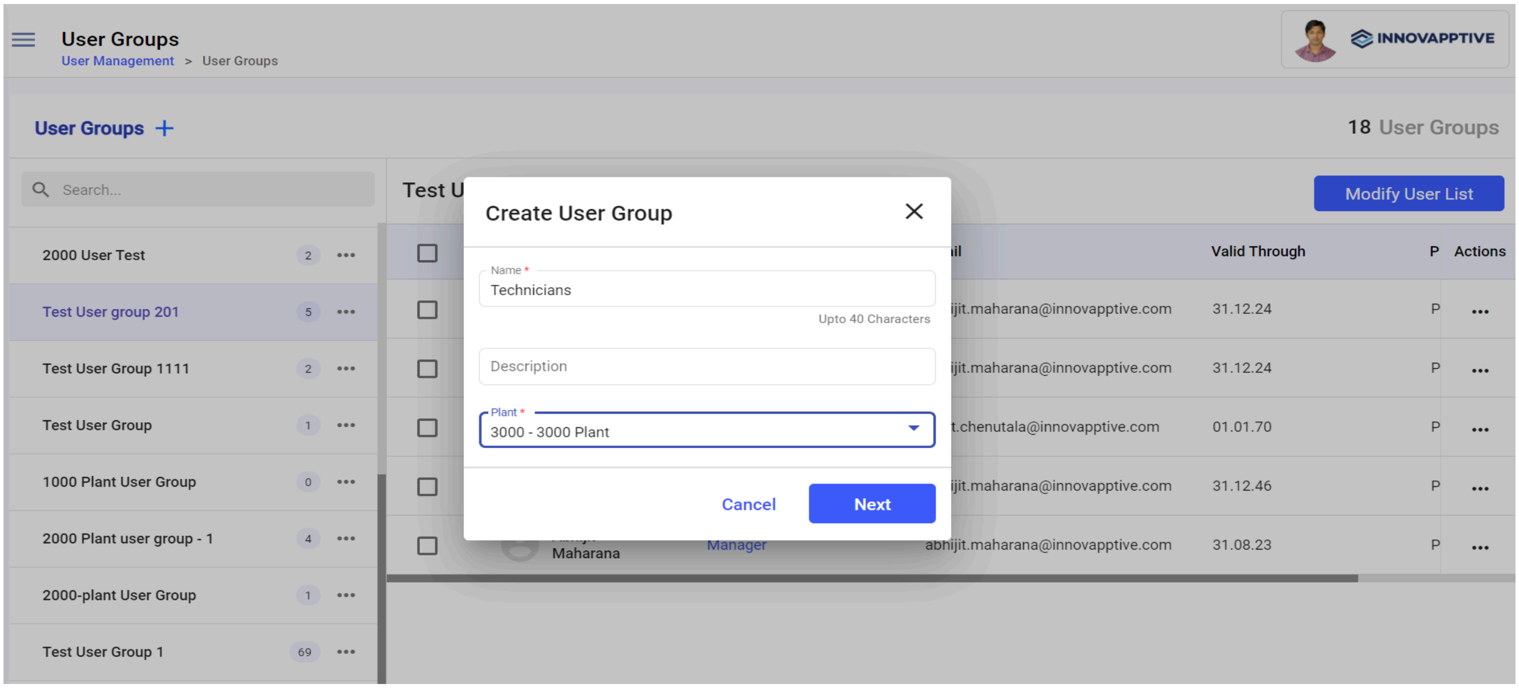
1. Expand the **User Management** module on the left-side pane and click the **User Groups**.

Figure 6-8 User Groups Screen



2. Click the **Add** icon next to the User Groups.
3. Select the **Position Based** or **User Based** option.
4. In the **Create User Group** window, fill in the following details:
   a. Enter the user group name in the **Name** field.
   b. Enter the description of the user group in the **Description** field.
   c. Select the plant from the **Plant** drop-down.
      Expand the down arrow icon to select the sub-modules.
   d. Select the unit from the **Unit** drop-down.
   e. Click **Next**.

Figure 6-9 Add User Group Details



5. In the **Select Users** window, select relevant users and click **Create**.
   The user group is created and you can see it on the left section.

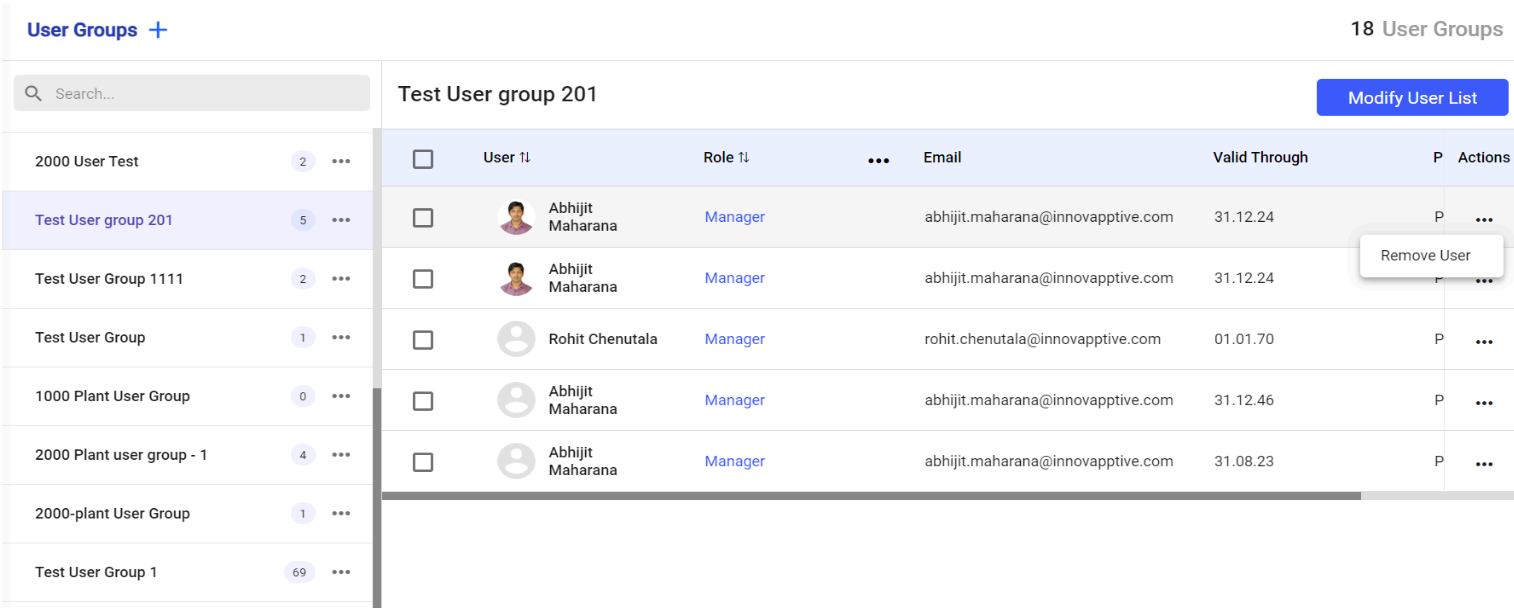
   In this screen, you can,
   - Copy the user group using the More ••• icon > **Copy** option next to the user group on the left-side section.
   - Delete the user group using the More ••• icon > **Delete** option next to the user group on the left-side section.
   - Edit the user group using the More ••• icon > **Edit** option next to the user group on the left-side section.

6.5. Remove Users from User Group

To remove a user from the user group:

1. In the User Groups screen, select a user group from the left section.
   The list of users associated with the selected user group is displayed on right section.
2. Click the More icon and select **Remove User** for the selected user.

Figure 6-10 Remove User



Note:
To remove more than one user at a time, select the checkboxes and click **Remove User** at the bottom.

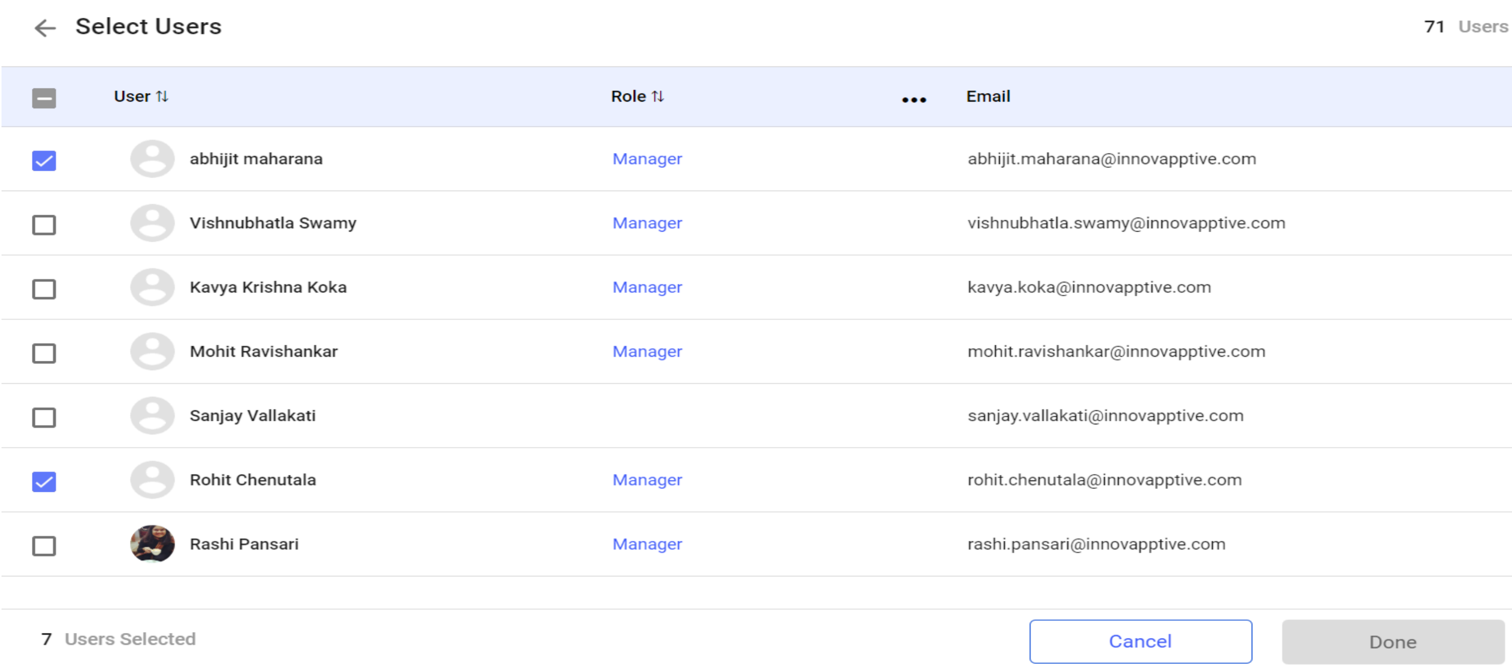
The selected user is removed from the user group.

6.6. Modify User List

To modify a user list:

1. In the User Groups screen, select a user group from the left section.
   The list of users associated with the selected user group is displayed on right section.
2. Click **Modify User List** on the right side.
3. In the **Select Users** window, deselect the checkboxes and click **Done**.

Figure 6-11 Modify Users



The users are removed from the user group.