User Guide for mRounds

Connected Worker Solutions

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User Guide for **mRounds**, a *Connected Office Worker Solution*.

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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 mRounds

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

This chapter has the following topics:

1.1. Overview of mRounds

mRounds assists supervisors in creating operator rounds and supports operators in executing tasks, recording asset data, and submitting completed rounds. The application includes mobile and web versions, with the mobile app guiding operators in detecting failures early on to prevent equipment breakdown, while the web app helps planners create maintenance plans and assign tasks to operators, ultimately reducing downtime and repair costs.

The mRounds application includes both mobile and web applications.

mRounds Mobile App

The mRounds Mobile Application helps operators execute assigned tasks by following systematic steps, logging asset data, detecting any anomalies, and preventing equipment breakdowns.

For instance, when a round planner or supervisor assigns a task to an operator to inspect motor bearing friction twice a week, the operator goes to the equipment's location, checks it using specific checkpoints, records data like RPM and voltage, and submits a report through the mRounds mobile app. If any irregularities are detected, the operator promptly raises a notification for the equipment or location. For more details, refer to About the Web Application Screens *(on page 115)*.

mRounds Web Application

The mRounds Web Application is your command center for managing maintenance operations efficiently, enables round planners or supervisors to create plans for monitoring and maintaining equipment or locations and assign these tasks to operators. These plans 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 more details, check Create and Manage Master Data *(on page 232)*.

Administrators can also include and oversee users, such as supervisors and operators. For further information, see Onboarding Tenants/Super Admins *(on page 248)*.

1.2. mRounds Benefits for Operators & Supervisors

Using the **mRounds Mobile Application**, Operators can:

- **Task Management on the Go**: Operators can access and execute assigned rounds directly from their mobile devices, enabling real-time updates from the field.
- **Easy Data Entry with Response Types**: The mobile app supports multiple response types (e.g., Scan, Geo Location, Text Answer, Signature), making it easy for operators to input accurate data efficiently.
- **Real-Time Task Updates**: Operators can log data, report issues, and update task statuses in real-time, providing supervisors with immediate insights into task progress.
- **Offline Functionality**: The mobile app works in offline mode, allowing operators to complete rounds and log data even without internet connectivity. Once back online, data is synced automatically.
- **Streamlined Communication with Supervisors**: Operators can easily communicate task progress, report equipment issues, and provide updates, ensuring that any potential problems are quickly addressed.
- **Self-Assign and Unassign Rounds**: Operators have the flexibility to self-assign rounds and un-assign tasks when necessary, improving task ownership and team coordination.
- **Improved Equipment and Asset Tracking**: Operators can scan equipment and input data on the go, ensuring that all equipment checks are recorded accurately for future reference.

- **Immediate Issue Reporting**: Operators can create and log issues instantly when they notice equipment failures or anomalies, ensuring that critical problems are addressed without delay.
- **Track and Document Shift Activities**: Operators can log their shift activities, providing a clear record of what tasks were completed during their shift, which aids in accountability and continuity.
- **User-Friendly Interface**: The mobile app has an intuitive interface that guides operators through rounds efficiently, minimizing the time spent on task navigation and data input.
- **Ad Hoc Rounds Generation Support**: Operators can initiate ad hoc rounds when unexpected inspections or equipment checks are needed, allowing flexibility in maintenance operations.
- **Digital Signatures for Compliance**: Operators can capture digital signatures when completing tasks, ensuring compliance with safety and operational procedures.

For details on how Operators can use mRounds to efficiently do their daily asset management tasks, see Execute Rounds and Record Asset Data *(on page 76)*.

Using the **mRounds Web Application**, Supervisors can:

- **Centralized Control of Maintenance Operations**: Supervisors can manage, schedule, and track all rounds from a central location, ensuring efficient task delegation and monitoring.
- **Real-Time Monitoring and Insights**: Access live data from operator rounds and ongoing tasks, allowing supervisors to respond quickly to critical issues and equipment failures.
- **Efficient Round Planning and Scheduling**: Create, modify, and schedule rounds for operators, ensuring routine maintenance tasks are completed on time and preventing equipment breakdowns.
- **Comprehensive Reporting and Documentation**: Generate detailed reports of completed rounds, equipment inspections, and issue resolutions. These reports can be exported and shared as PDFs, aiding compliance and audit readiness.
- **Advanced Round Plan Templates**: Supervisors can create templates for standard operating procedures and recurring maintenance tasks, reducing the time required to set up new rounds.
- **Enhanced Collaboration with Operators**: Through shared data visibility, supervisors can coordinate more effectively with operators, ensuring that the most critical tasks are prioritized.

- **Improved Accountability**: The web app allows supervisors to assign tasks, track progress, and hold team members accountable for completing their responsibilities.
- **Data-Driven Decision Making**: Leverage data from rounds and maintenance operations to make informed decisions regarding equipment health, task prioritization, and resource allocation.
- **Customizable PDF Reports**: Supervisors can configure and generate customized reports with organizational branding, giving stakeholders a clear and professional overview of maintenance operations.
- **Shift Handover Reports**: Easily generate and accept shift handover reports, ensuring smooth transitions between shifts and maintaining continuity in operations.

For details on how Supervisors can use mRounds web app to efficiently manage their daily asset management tasks, see Create, Review and Schedule a Round Plan *(on page 138)*.

1.3. New Features and Enhancements in mRounds

The text outlines the new features and enhancements introduced in various releases of the mRounds application, including improvements in productivity, task execution, notifications, user access control, round planning, and data management. These enhancements aim to streamline operations, improve efficiency, and provide users with advanced functionalities for better maintenance and asset management.

New Features and Enhancements in Release 2501

Table 1-1 New Features and Enhancements in Release 2501

Smart Workflow Features • **Automated Shift Detection**: Never worry about shift selection again - the app intelligently determines your shift based on your device's time during login, streamlining your workflow from the start. For more information, see Update User Preferences *(on page 109)*. • **Seamless Asset Integration**: Quickly scan asset or location IDs while creating issues or actions, eliminating manual entry errors and speeding up the documentation process. For more information, see Create an Issue *(on page 91)*. • **Plant-Level Asset Scanning**: Control Asset Scan functionality at the plant level by enabling or disabling it during plant creation or modification. For more information, see Create Plants *(on page 232)*.
Enhanced Communication & Historical Insights • **Intelligent Notification System**: Stay informed with rich push notifications for chat messages and attachments, including issue titles and message previews. Track unread communications effortlessly with notification icons and prioritized issue display. • **Smart User Tagging**: Effortlessly mention colleagues using @username with smart drop-down suggestions of conversation participants, making collaboration seamless. • **Extended Data Access**: Historical data access period extended from 1 week to 1 month for Shift Handover reports, Shift logs, Issues, and Actions. This enables operators returning from extended shifts or leave to easily review activities, issues, and pending actions from their missed shifts, ensuring seamless operational continuity. For more information, see Review and Accept the Shift Handover Report *(on page 66)*.
Enhanced User Experience

Table 1-1 New Features and Enhancements in Release 2501 (continued)

• **Improved Navigation**: Experience seamless auto scrolling to next questions after entering responses. • **Auto Sorted Lists**: Units, Functional Locations, and Assets dropdowns now sorted by ID for easier reference in Issues and Action screens. • **Enhanced Numeric Input**: Added support for negative values in the numeric keypad, making it easier to record measurements and readings. • **Quick Shift Handover Access**: Access shift handover reports and shift logs from the home screen, and view submitted round details within the reports.
Optimized Performance • **Intelligent Memory Management**: Proactive system monitoring with alerts for optimal performance during Round execution in Android application. • **Advanced Sync Controls**: Reset and refresh configurations with "Restart Initial Sync". For more information, see View User Profile *(on page 108)*.
Improved Shift Handover Management • **Rich Text Formatting**: Transform shift logs with rich text formatting capabilities including bold, italics, and structured lists. • **Flexible Submission Windows**:Set custom time buffers for submitting Shift Handover Reports (SHR) before and after a shift ends. (SHR Improvement). For more information, see Review and Accept the Shift Handover Report *(on page 66)*.
Smarter Workflow Controls • **Advanced Conditional Logic**: Control the visibility of mandatory tasks, sections, and template-imported tasks using advanced logic, including "In Between" for precise numeric control, or "None" for empty selections without logic. • **Plant-Specific UI**:The app streamlines the interface by automatically adapting to your plant's configuration, showing only relevant unit and position options. For example, if a plant does not use units or positions, those options disappear ensuring a simplified, intuitive experience for issue reporting and action creation.
Administrative & Data Management Enhancements

Table 1-1 New Features and Enhancements in Release 2501 (continued)

- **Enhanced SFTP Integration:** Added "Units" and "Positions" columns to the SFTP file for task management.
- **Smart Round Scheduling**: Automated handling of calendar edge cases for monthly intervals, ensuring consistent scheduling without manual intervention.
- **Plant-Level Asset Scanning**: Granular control over asset scan functionality at the plant level, allowing customization per facility.
- **Hierarchical Email Configuration**: Configure automated PDF report delivery based on organizational levels (Plant, Unit, Position), ensuring targeted distribution of critical information.
- **Bulk User Creation:** Tenant Admins can now upload CSV or Excel files to create multiple users at once, saving time.

New Features and Enhancements in Release 2408

Table 1-2 New Features and Enhancements in Release 2408

Comprehensive Rounds Compliance & Exception Reporting

Easily create and review detailed Rounds Compliance & Exception Reports. These reports highlight deviations or delays in operational processes, helping teams ensure compliance and take timely corrective actions when needed.

How it benefits:

- **Enhanced Monitoring**: Identify issues or compliance gaps quickly.
- **Actionable Insights**: Address delays or deviations through data-driven corrective actions, improving operational integrity.

For more information, see Monitor in Real-Time and Share Reports *(on page 126)*.

Streamlined Issue Creation & Assignment in Web App

Supervisors can now Create and Assign Issues Directly from the Web App, making it easier for supervisors to quickly document issues and assign them, ensuring that tasks are efficiently delegated and tracked to completion.

How it benefits:

Table 1-2 New Features and Enhancements in Release 2408 (continued)

• **Improved Workflow**: Supervisors can easily create and assign issues, reducing delays in task 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 91)*.
Multi-Language Support for mRounds Mobile App Operators can now View the mRounds Mobile Application in Their Preferred Language, tailored to their specific language and regional settings. How it benefits: • **Enhanced Accessibility**: Operators from diverse linguistic backgrounds can easily access and understand the app, improving task comprehension and reducing errors. • **Increased Efficiency**: By working in their preferred language, operators can process information faster, leading to quicker responses and better task execution. • **Improved Employee Satisfaction**: A language-inclusive interface boosts operator confidence and engagement, contributing to better performance and morale. For more information, see Change the Language *(on page 114)*.
Implemented Rapid Sync Rapid Sync in the mRounds application enhances real-time data synchronization across multiple devices and servers, ensuring that critical information captured during operator rounds is updated instantly across the system. How it benefits: • **Real-Time Data Availability:** Instantly synchronizes data across all devices, enabling operators to access the latest information without delays. Facilitates immediate decision-making based on the most current data, improving operational efficiency. For more information, see Access Rounds in Offline Mode *(on page 69)*.
Improved Productivity with Seamless Task Navigation

Table 1-2 New Features and Enhancements in Release 2408 (continued)

With the new **Seamless Task Navigation** feature, operators can quickly move between tasks using "**Next**" and "**Previous**" buttons on the on-screen keyboard, eliminating the need for manual input. How it benefits: • **Glove-Friendly Operation**: Operators 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 task navigation leads to quicker task completion, enhancing overall operational efficiency. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Create Real-Time Breakdown Alerts With Real-Time Breakdown Alerts, you can immediately notify operators about any equipment breakdowns. This feature ensures operators are alerted instantly, allowing them to respond quickly and reduce downtime, keeping operations running smoothly and efficiently. How it benefits: • **Faster Response Time**: Operators 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 91)*.
SFTP Server Downtime Notifications Stay ahead of potential disruptions with SFTP Server Downtime Notifications. This feature sends instant alerts when the SFTP server experiences downtime, enabling the super admin to take immediate action and restore operations without delay. How it benefits:

Table 1-2 New Features and Enhancements in Release 2408 (continued)

- **Proactive Issue Management**: Super admins are promptly informed of any server issues, allowing for quick resolution.
- **Minimized Impact**: Faster responses help reduce the negative effects of server downtime on daily operations.

Real-Time Access to Previous Readings During Round Tasks

Operators can now View Previous Readings While Executing a Round Task. The past data is displayed directly above the current task for immediate reference and comparison.

How it benefits:

- **Increased Accuracy**: Operators can quickly compare current readings with previous ones, catch potential machine breakdowns early, and execute tasks with confidence.
- **Faster Decision-Making**: Immediate access to past data allows operators to make informed decisions on the spot, streamlining workflows.

For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

Instant Issue Notifications for Faster Response

With Instant Issue Notifications, any created issue is immediately converted into a notification and sent to operators, ensuring swift action.

How it benefits:

- **Reduced Response Time**: Operators 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**: By preventing workflow interruptions, operators can maintain high productivity.

For more information, see Create an Issue *(on page 91)*.

Enhanced Location Access for Precise Task Execution

Table 1-2 New Features and Enhancements in Release 2408 (continued)

With Location Access Enabled, devices can utilize location services to ensure operators perform tasks and rounds within the designated areas, improving accuracy and compliance. How it benefits: • **Improved Precision**: Operators are guided to the correct location, reducing the risk of performing tasks in the wrong area. • **Accurate Data Collection**: Location validation ensures that data is collected from the intended site, leading to more reliable information. For more information, see Create an Issue *(on page 91)*.
Plant-Specific Filters in Master Data, Reports and Dashboard The Plant-Specific Filters feature allows operators to filter and view data, reports, and dashboards specific to individual plants within an organization. How it benefits: • **Enhanced Decision-Making**: Plant-specific filters enable managers and operators to make more informed decisions based on precise data from their specific operational unit, avoiding irrelevant information from other plants. • **Operational Focus**: Operators and staff can focus on their specific plant's performance, driving productivity improvements and targeted troubleshooting without distraction from other operational areas. For more information, see Create and Manage Master Data *(on page 232)*.
Unit-Based Data Filtering Enhance data relevance with Unit-Based Data Filtering. This feature allows users to filter web application data based on assigned units, improving accessibility to the most pertinent information. How it benefits:

Table 1-2 New Features and Enhancements in Release 2408 (continued)

• **Improved Efficiency**: Quickly find data specific to relevant units, reducing time spent sifting through unrelated information. • **Streamlined Access**: Provides more focused insights, leading to better decision-making. For more information, see About the Web Application Screens *(on page 115)*.
Flexible Passcode Configuration With Flexible Passcode Configuration, users can skip the passcode requirement if their organization has not enabled it at the tenant level, simplifying the login process without compromising security. How it benefits: • **Seamless User Experience**: No need to enter a passcode if not required, speeding up access to the system. • **Custom Security**: Allows organizations to configure security protocols that align with their specific needs. For more information, see Log in to the Mobile Application *(on page 51)*.

New Features and Enhancements in Release 2404

Table 1-3 New Features and Enhancements in Release 2404

Execute Rounds even after their due time Execute round tasks even after their due time. This buffer time for a round helps operators execute rounds without them being marked overdue. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Self Assign Rounds from My Rounds This usability enhancement helps operators assign open rounds to self directly from the My Rounds screen.

Table 1-3 New Features and Enhancements in Release 2404 (continued)

For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
View Previous Exceptions to Readings When a reading is taken, the operator can now view previous exceptions to readings along with exception messages that are taken during previous shifts. This helps operators identify hazardous conditions of the equipment. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
View Multiple Lower and Upper Limits View multiple lower and upper limit range values and exceptions for numeric and slider responses while executing a round. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Create Issues / Actions at Unit Level Create issues and actions at Unit level. This helps operators assign issues to units without errors. For more information, see Create an Issue *(on page 91)*.
Track Round Execution Duration Identify the duration of round execution. This helps users to optimize future rounds. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Setup Workflow Approval Configure workflow approval for round plan submissions and publishing. With proper workflows, technicians with the right skills will be able to review alerts, warnings or cautions. For more information, see Review and Approve Round Plans *(on page 182)*.
Maintain Buffer Period for Rounds

Table 1-3 New Features and Enhancements in Release 2404 (continued)

Add a buffer period for rounds. This helps operators execute rounds even after their due time without the rounds being marked as overdue. For more information, see Schedule Round Plans by Frequency *(on page 188)*.
Add Exceptions for Minimum and Maximum Values Add exceptions like Warning, Alert, Note, and so on for low and high range values while creating a round plan. This helps operators identify any hazardous condition of the equipment. For more information, see Number Range and Exceptions *(on page 147)*.
Copy Tasks across Multiple Assets Copy tasks in a round plan to multiple assets or locations with ease. This reduces repetitive work. For more information, see Create a Round Plan and Publish *(on page 166)*.
Filter Rounds at Unit Level • Filter rounds data based on their assigned units to control access of the users. • Users with multiple units can select and view data for one unit at a time. For more information, see About the Web Application Screens *(on page 115)*.
Add Multiple Lower and Upper Limits Configure multiple lower and upper limit range values and exceptions for numeric and slider responses while creating a round plan. For more information, see Number Range and Exceptions *(on page 147)*.
View Unit-Level Issues and Actions View issues and actions at Unit level to ensure right issues are raised on the right units. For more information, see About the Web Application Screens *(on page 115)*.

Table 1-3 New Features and Enhancements in Release 2404 (continued)

Track Round Execution Duration Identify the duration of round execution to optimize future rounds accordingly. For more information, see View Round Plans and Plan Details *(on page 203)*.
Enhanced "Custom Picklist" Response Type The "Custom Picklist" response type now displays "Allow More than One Selection", when values exceed two options.
Confirm Shift Handover When you click the Shift Handover button, an alert message, "Do you really want to start handover?" appears. For more information, see Overview of Shift Handover Reports *(on page 214)*.

New Features and Enhancements in Release 2403

Table 1-4 New Features and Enhancements in Release 2403

Create Round Plan Template • Create a Round Template with one page and multiple sections and tasks. • Edit the template sections and tasks. • Copy an existing template to quickly create new templates • Archive templates that are no longer required, or permanently delete them. • Restore the archived templates if required. For more information, see Create and Manage Round Templates *(on page 196)*.
Import Round Plans and Tasks Data Eliminate manual data recreation by exporting and importing Round Plans and Tasks data from one environment to another.

Table 1-4 New Features and Enhancements in Release 2403 (continued)

For more information, see Import Sections and Tasks from Template *(on page 177)*.
Round Plans are automatically updated with templates that are modified When a template is updated, associated Round Plans are automatically updated. This helps maintain consistency and accuracy across all plans. For more information, see Edit Round Templates *(on page 201)*.
Shift Handover Report Enhancements • Shift Handover Module is now governed by Access control. • Users can control the functionality of units within the application. • Generate Plant Level Shift Handover Reports (SHRs) when the SHR flag is enabled and the Unit flag is disabled. For more information, see Manage Shift Handover Authorization *(on page 222)*.
Bulk Upload Round Plans from Excel Add multiple Round Plans with tasks from an Excel sheet. mRounds Round Plans screen displays success / failure status along with Round Plans total count. For more information, see Create a Round Plan and Publish *(on page 166)*.
Customize Shift Log Template Create, edit, and modify a customizable Shift Log Template for operators to easily record tasks, issues, and notes during their shifts. This ensures clear communication. For more information, see Create Shift Log Template *(on page 220)*.
Auto Sort Round Plans by latest When a round plan is published, the plan automatically sorts to the top of the list. You can immediately view the published plan. For more information, see Create a Round Plan and Publish *(on page 166)*.

Table 1-4 New Features and Enhancements in Release 2403 (continued)

Automatic Asset Name Updates in Round Plans When an asset name is changed after the creation of a round plan, the updated name is automatically updated in the round plan. For more information, see Create a Round Plan and Publish *(on page 166)*.
Auto-Populate "Reported By" Field The "Reported By" field in the SAP Notification screen auto-populates based on the user's login credentials.

New Features and Enhancements in Release 2402

Table 1-5 New Features and Enhancements in Release 2402

SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication. For more information, see Log in with SAP IDP *(on page 56)*.
Add Audio, Video and Documents to Task Responses Add attachments like audio, video and documents to your Task responses and access them as links in the generated PDF for better communication and collaboration. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
View and Download Attachments for Rounds View and download attachments like audio, video and documents by clicking the links in the generated round details PDF to validate the evidence effectively. For more information, see View Round Plans and Plan Details *(on page 203)*.
Master Data Management Integration

Table 1-5 New Features and Enhancements in Release 2402 (continued)

Create and update master data directly within the Connected Worker's platform by utilizing files stored in an FTP server. For more information, see Establish a Connection with FTP Server for Data Export *(on page)*.

New Features and Enhancements in Release 2401

Table 1-6 New Features and Enhancements in Release 2401

Use Formulas for Calculations During Task Execution Execute tasks accurately using formulas. These formulas are configured using the web application and give accurate calculations and help operators enter accurate data. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Assign Actions to User Groups Create and assign actions to user groups in mobile application. This allows any operator in those groups to pick up and execute those actions. For more information, see Create Actions for Unresolved Issues or Tasks *(on page 97)*.
Add required notes in Shift Handover Reports Add and include required notes in the Shift Handover Report. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
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 Update User Preferences *(on page 109)*.
Acknowledge End User License Agreement

Table 1-6 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 Log in for the First Time *(on page 51)*.
Configure Mathematical Formulas for Fields Configure mathematical formulas for fields. These formulas help operators get accurate calculations and enter accurate data. For more information, see Number *(on page 145)*.
Export Historical Data to FTP Export Historical Data from the application in the .CSV format to an FTP server. This helps share the data easily with employees who need it without providing access to the application. For more information, see Establish a Connection with FTP Server for Data Export *(on page)*.
Deactivate Unnecessary Master Data Deactivate Assets and Locations that are no longer needed. For more information, see Deactivate Location Master Data *(on page)*.
Create and Assign Actions to User Groups Create and assign actions to user groups in the web application. This allows any operator in those groups to pick up and execute those action. For more information, see Create an Action *(on page 209)*.
SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication. For more information, see Log in with SAP IDP *(on page 124)*.

Table 1-6 New Features and Enhancements in Release 2401 (continued)

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 248)*.
Configure to control notification creation for "Incident" and "Near Miss" categories Configure to control notification creation for "Incident" and "Near Miss" categories at the tenant level, with the option to individually enable or disable SAP Notifications for each category. For more information, see Create Tenant/Super Admin role *(on page 248)*.

New Features and Enhancements in Release 2312

Table 1-7 New Features and Enhancements in Release 2312

Prevent accidental rounds submission with prompts Receive confirmation prompts when submitting rounds, and prevent accidental submissions of rounds. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
View Character Limits for Fields View character limits for each field, enter the right data, and maintain data integrity. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Justify Overdue Rounds When a round goes beyond the due date, specify reasons for the overdue in the comment. For more information, see About the Mobile Application Screens *(on page 58)*.
Record Task-Level Date & Timestamp

Table 1-7 New Features and Enhancements in Release 2312 (continued)

Move between tasks during round execution by marking / recording the date and time for each task individually. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Receive Instant Email Alerts • Receive instant emails when an issue or action is created, updated, resolved or closed. For more information, see Create and Manage Issues *(on page 206)*.
Specify Length of data to be entered in the fields Set specific field lengths while planning rounds. This helps prevent incorrect or incomplete data entry during round execution. For more information, see Understanding Response Types Used for Creating Round Tasks *(on page 139)*.
Download User List for a Plant Download the user list from the User Management module and view their assigned roles. For more information, see Create Users and Assign Roles *(on page 260)*.
Create and Schedule Ad-Hoc Rounds Create ad-hoc rounds to address emergencies or any unforeseen situations. For more information, see Create an Ad-Hoc Round *(on page 180)*.

New Features and Enhancements in Release 2311

Table 1-8 New Features and Enhancements in Release 2311

Acknowledge Previous Shift Handover Reports

Table 1-8 New Features and Enhancements in Release 2311 (continued)

Review and acknowledge the previous shift's handover report before starting new rounds. This helps execute rounds with increased efficiency. For more information, see Review and Accept the Shift Handover Report *(on page 66)*.
Add Documents to Task Responses Add attachments like documents to your Task responses and access them as links in the generated PDF for better communication and collaboration. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Add Real-Time Shift Log Entry Add shift logs with notes and observations to the Shift Handover Report during your shift. For more information, see Log Shift Activities *(on page 102)*.
Advanced User Access Control Select position and unit while logging in. This syncs the rounds by position and unit and eliminates unnecessary data. For more information, see Log in for the First Time *(on page 51)*.
Generate and Approve Shift Handover Report • Create a shift handover report with essential information like observations, comments, and responsibilities for smooth communication and knowledge transfer during shift changes. • View, download, and share shift handover reports in PDF via email for effective knowledge transfer. • Review and approve the details, like observations, notes, comments, etc, in the Shift Handover Report and address any issues or concerns, if any, to facilitate effective communication. • This helps supervisors be aware of any ongoing issues, pending tasks, or significant changes.

Table 1-8 New Features and Enhancements in Release 2311 (continued)

For more information, see Overview of Shift Handover Reports *(on page 214)*.
View and Download Attachments for Rounds View and download attachments like videos and documents by clicking the links in the generated round details PDF and validate the evidence. For more information, see View Round Plans and Plan Details *(on page 203)*.
Mark Functional Locations as Units Mark or flag Functional Locations as units. This helps assign users to units, create user groups based on units, select a unit while creating a round plan, schedule rounds by unit, and filter handover reports. For more information, see Create Locations *(on page 236)*.
Add Position Master Data • Add positions and assign them to users. • Create user groups and schedule rounds based on positions. For more information, see Create Positions *(on page 256)*.

New Features and Enhancements in Release 2309 SP04

Table 1-9 New Features and Enhancements in Release 2309 SP04

Quick Access to Readings History from Task Screen Analyze and track trends easily from past readings by viewing reading history with a single tap. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

New Features and Enhancements in Release 2309 SP03

Table 1-10 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 Execute Rounds with mRounds Mobile App *(on page 77)*.
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 Creating ERP Notification for an Asset *(on page 212)*.
Access Plant-Specific Rounds Assign plants to users and ensure secure control over the rounds. For more information, see About the Web Application Screens *(on page 115)*.
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 1-10 New Features and Enhancements in Release 2309 SP03 (continued)

For more information, see Create and Manage Master Data *(on page 232)*.

New Features and Enhancements in Release 2309 SP02

Table 1-11 New Features and Enhancements in Release 2309 SP02

Auto-Capture Geolocation during Task Execution During task execution in offline mode, auto-capture geolocation of the asset. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Monitor team activities Generate a team rounds / inspections report that provides an overview of all completed activities, identifies areas for improvement, and ensures task completion. For more information, see Overview of Dashboard *(on page)*.
View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency. For more information, see Overview of Dashboard *(on page)*.
Access detailed reports of supervisors' actions on the issues raised Administrators can access detailed reports of actions taken by supervisors on issues that are raised by operators. For more information, see Overview of Dashboard *(on page)*.
Get a report for Overdue tasks Get a detailed report on overdue tasks. These reports help supervisors have a glance at overdue tasks and take appropriate action.

Table 1-11 New Features and Enhancements in Release 2309 SP02 (continued)

For more information, see Overview of Dashboard *(on page)*.
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 *(on page 244)*.

New Features and Enhancements in Release 2309 SP01

Table 1-12 New Features and Enhancements in Release 2309 SP01

Access attachments in offline mode Access attachments even when in offline mode and execute rounds without hindrance in low or no network areas. For more information, see Access Rounds in Offline Mode *(on page 69)*.
Enable / Disable application passcode screen Disable application passcode screen when user does not want it and enable network login ID and password to login. For more information, see Log in for the First Time *(on page 51)*.
Access detailed reports of supervisors' actions on the issues that are raised Administrators can access detailed reports of actions taken by Supervisors on the *Issues* that are raised by operators. For more information, see Create and Share Transactions and Rounds Reports *(on page 130)*.
View operator-specific Rounds Summary Reports

Table 1-12 New Features and Enhancements in Release 2309 SP01 (continued)

View operator-specific Rounds Summary Reports. These reports help improve operational efficiency. For more information, see Create and Share Transactions and Rounds Reports *(on page 130)*.
Configure Widgets on the Dashboard screen Configure the dashboard widgets that you need and improve monitoring tasks. For more information, see Create Custom Widgets *(on page 127)*.
Configure the Task Compliance Report Configure Task Compliance Reports, download them with a click and submit them during audits. For more information, see Create and Share Transactions and Rounds Reports *(on page 130)*.
Query and retrieve a report on all exceptions or out-of-specifications Query for comprehensive reports on exceptions or out-of-specifications. This helps supervisors gain vital insights into round tasks and assets health. For more information, see Create and Share Transactions and Rounds Reports *(on page 130)*.
Download widgets as PDF and export data in Excel format Download dashboard widgets as PDFs and export data in Excel format. Users can share these over email. For more information, see Create Custom Widgets *(on page 127)*.
Monitor, Improve, and Track Effectively with Comprehensive Rounds Report

Table 1-12 New Features and Enhancements in Release 2309 SP01 (continued)

Stay on top of team performance with comprehensive rounds reports. Supervisors can use these reports to monitor activities, pinpoint areas of improvement, and track tasks completion. For more information, see Overview of Dashboard *(on page)*.

New Features and Enhancements in Release 2309

Table 1-13 New Features and Enhancements in Release 2309

Sync round plans data for a plant Select a specific plant to sync data and filter out non-relevant data. For more information, see Update User Preferences *(on page 109)*.
Access only user group specific rounds Access user group specific rounds for a tailored user experience. For more information, see About the Mobile Application Screens *(on page 58)*.
Detect anomalies early by checking historical data With access to historical data and trends for an asset, detect anomalies early and enforce appropriate maintenance tasks. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Capture detailed rounds data with additional data provided by the rounds planner View additional notes, labels, values in the Task Details screen that are provided by the rounds planner and capture detailed and valuable information. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Attach videos and documents as proofs for tasks

Table 1-13 New Features and Enhancements in Release 2309 (continued)

Attach videos and documents as responses and improve comprehension of the task data, with clickable links in generated PDF reports for enhanced usability and documentation. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Toggle themes for personalized experience Switch between Dark Mode and Light Mode themes depending on your preferences. For more information, see Switch Between Dark and Light Modes *(on page 112)*.
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 rounds to another group. For more information, see Create User Groups and Add Users *(on page 264)*.
Schedule Rounds based on task frequency for efficient maintenance Schedule Round Plans based on individual task frequencies. Form a comprehensive Master Plan for proactive asset maintenance and ensure precise, efficient equipment maintenance. For more information, see Schedule Rounds at Task Level *(on page 193)*.
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 Create Users and Assign Roles *(on page 260)*.
Assign rounds to user groups

Table 1-13 New Features and Enhancements in Release 2309 (continued)

Assign rounds to user groups when scheduling. Any user from the group will be able to pick up the round task and execute maintenance. For more information, see Schedule Round Plans *(on page 187)*.
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 145)*.
Add additional details for conditional logic Add mandate responses, define a number range, and specify unit of measurement options for tasks in conditional logic. For more information, see Conditional Logic *(on page 163)*.
Add additional notes, labels, values in the Task Details screen Add additional notes, labels, values in the Tasks Details screen to provide additional information to technicians and assist them to function more efficiently and effectively. For more information, see Create a Round Plan and Publish *(on page 166)*.

New Features and Enhancements in Release 2308

Table 1-14 New Features and Enhancements in Release 2308

Get Timely Reminders about Every Issue, Action and Round through notifications Receive push notifications from the application to ensure you do not miss important reminders such as overdue rounds, issues, or actions. For more information, see How to view Local Notifications *(on page)*.
Work on daily Rounds effortlessly with access to Additional Notes and Attachments

Table 1-14 New Features and Enhancements in Release 2308 (continued)

Access any notes and manuals associated with rounds even in offline mode to execute the rounds according to the Standard Operating Procedures to enhance efficiency and productivity. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Skip Rounds with a Reason Skip the round with an appropriate reason when the round is no longer required. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Reduced cognitive load with well-structured rounds categorization View rounds grouped by start/due date & time in the My Rounds tab to quickly choose shift tasks and to help you identify and prioritize tasks. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Explore Dashboard with Interactive Graphs and Get Realtime Insights at a Glance • A dynamic pie chart displays rounds 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 rounds. • 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 About the Mobile Application Screens *(on page 58)*.
Section-wise task counts for enhanced progress tracking View the count of tasks on individual sections in a page for each round to clearly understand the task distribution and progress within the asset in the mobile application. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

Table 1-14 New Features and Enhancements in Release 2308 (continued)

Switch Users Seamlessly from the lock screen 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 Log in as a Different User (Shift Handover Scenario) *(on page 57)*.
Real-Time adaptation with the Skipped status in Rounds You can view the Skipped status, which indicates that an entire round is skipped with a reason. For more information, see About the Web Application Screens *(on page 115)*.
Add Additional Notes and Attachments to work on rounds effortlessly Add additional notes, safety instructions, and manuals as PDFs or images in the Round Plan Details screen to provide additional information to function more efficiently and effectively. For more information, see Create a Round Plan and Publish *(on page 166)*.

New Features and Enhancements in Release 2306

Table 1-15 New Features and Enhancements in Release 2306

Asset/Locations Management and Skip Functionality • View a list of assigned Assets/Locations for rounds. • Skip Asset/Location maintenance checks and provide a reason. • Undo skip for Assets/Location that are marked as skipped from the Route list. • View the count of skipped tasks in the Asset summary screen. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Introduced Dashboard

Table 1-15 New Features and Enhancements in Release 2306 (continued)

- Dynamic pie chart displays rounds that are due today with Assigned, In-Progress, and Submitted statuses.
- Click Assigned and In Progress legends to view the My Rounds screen.
- Click cards that display the count of Issues and Actions assigned to the operator to facilitate navigation to the respective screens.
- Add Issues and actions from Open Issues/Actions from the dashboard.

For more information, see About the Mobile Application Screens *(on page 58)*.

View numeric historical data

- View the history of numeric fields as a line chart for Number and Slider response types.
- View the question name, operators who took the last 5 readings, and dates of the readings.

For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

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 181)*.

Overdue status in Rounds

- Overdue status indicates that a round has not been submitted before the due date.
- The application hides Overdue and Submitted Rounds one day after their due date.

For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

Enhanced Round Plan Details

Table 1-15 New Features and Enhancements in Release 2306 (continued)

• Add additional fields, labels with up to 25 and values with up to 40 characters, at the Round Plan 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 Round Plans. • Set labels and values as read-only to ensure consistency and prevent unintended modifications. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Enhanced Number Response Type Enter decimals and negative values as responses to tasks that have a number response type. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Scan assets from Assets/Locations Route screen • Scan Asset QR/Bar-codes for the list of Rounds for an asset. • Select the Round to access the asset form and enter task values. • Streamlined navigation between asset lists and rounds through QR/Bar-code Scan. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
View Start and Due Date/Time and start round • View Round details with Shift, Start date, Due Date, and Time slot in the Header. • Start rounds only after the designated Start Date/Time. • Overdue rounds automatically disappear from the mobile app after 24 hours. • Generate an Ad-hoc round with a 24-hour validity period. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Assign rounds to plants based on shifts

Table 1-15 New Features and Enhancements in Release 2306 (continued)

• Create shifts and Assign to Plant Operations. • Schedule rounds by shifts and split slots for improved flexibility and optimized work execution. For more information, see Schedule Round Plans *(on page 187)*.
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 Plants *(on page 232)*.
Embrace Control Over Rounds • View/modify Shift, Start Date & time, Due Date & time, and Assignee for each round. • Add a notification message whenever the Shift, Date, or time is changed. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
View Count of Questions on each Section • View questions count on individual sections for each inspection in the mobile application. • Dynamic questions count adjustments for condition logics like Ask/Hide tasks. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
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 a Round Plan and Publish *(on page 166)*.
Enhanced PDF Preview Setup

Table 1-15 New Features and Enhancements in Release 2306 (continued)

Download PDFs of Overdue Rounds if they were earlier in the In Progress state.
Productivity Enhancements View a list of Skipped Assets/Locations assigned for the round. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

New Features and Enhancements in Release 2305

Table 1-16 New Features and Enhancements in Release 2305

Execute Rounds • Skip non-mandatory tasks from the rounds by selecting a reason. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

New Features and Enhancements in Release 2304

Table 1-17 New Features and Enhancements in Release 2304

View, Assign, and Execute Rounds • View the list of rounds in Open Rounds. • Self-Assign rounds from Open Rounds. • View assigned rounds in My Rounds. • Unassign rounds to free them for reassignment. • Execute the assigned rounds by completing tasks and filling in the responses, and submit them. • Execute the rounds in the sequence of the Locations, Assets placed in the organization. For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.
Create, View, Assign, and Close Issues

Table 1-17 New Features and Enhancements in Release 2304 (continued)

- Create issues for the observed anomalies during rounds execution.
- Determine Priority through Risk Based Matrix.
- 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 an Issue *(on page 91)*.

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.
- Start live conversation with assigned Users.
- Create a Notification for an asset and sync it with backend ERP systems instantly.

For more information, see Create Actions for Unresolved Issues or Tasks *(on page 97)*.

Productivity Enhancements

- View the maintenance route or assets and navigate quickly through asset locations.
- View Asset Hierarchy to locate the asset.
- Track task progress through the progress bar on the top.
- Add notes, attachments, and media for additional information that helps execute rounds efficiently.

For more information, see Execute Rounds with mRounds Mobile App *(on page 77)*.

Access the application in offline mode

Table 1-17 New Features and Enhancements in Release 2304 (continued)

• Automatically download data from servers onto the devices on login. • Access the data in the offline mode. • View, Assign, and Execute Rounds. • Create, View, Assign, and Close Issues. • Create, View, Assign, and Close Actions. • Automatically download updates and syncs changes to the server when the internet connection is available. For more information, see Access Rounds in Offline Mode *(on page 69)*.
Create, View, Edit, and Publish Round Plans • Create a round plan with multiple pages, sections, and tasks and publish. • Preview the round plan in the mRounds mobile application. • Configure the PDF view of the submitted rounds with Header, Subject, Footer, and Body Content. • View list of created round plans, edit them if required, and view plan meta details. • Edit a round plan to meet new requirements. For more information, see Create a Round Plan and Publish *(on page 166)*.
Add Response Types and Conditional Logic to Questions 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, Hyperlink, Instructions, Multiple Choice, Global Picklist, Conditional Logic response types can be added to tasks. For more information, see Create a Round Plan and Publish *(on page 166)*.
Schedule Round Plans • Schedule round plans by frequency, by data and assign them to operators. • View the list of scheduled and published round plans. • Modify scheduled round plans. • Select a round to view details like Operator, Status, Scheduled By, and so on.

Table 1-17 New Features and Enhancements in Release 2304 (continued)

For more information, see Schedule Round Plans by Frequency *(on page 188)*.

Track progress of Scheduled Rounds

- View Open, To-Do, In-progress, and Submitted rounds.
- Download PDF reports of in-progress and Submitted rounds.

For more information, see View Submitted Rounds *(on page 204)*.

Archive, Restore or Delete Round Plans

- Archive authored round plans which are no longer required.
- Restore the round plan when required.
- Permanently delete the round plans.

For more information, see Archive, Restore, and Delete Round Plans *(on page 229)*.

Track progress of Open Issues and Actions

- View charts of open issues and actions.
- View list of Open issues and actions created by operators.
- Create a Notification for an asset and sync it with backend ERP systems instantly.

For more information, see Create and Manage Issues *(on page 206)*.

Search & Filter

- Search & Filter round plans.
- Search & Filter rounds.
- Search & Filter Archived round plans.
- Search, Filter, and view open issues and actions.

For more information, see Locate Rounds, Issues, and Actions *(on page 225)*.

Productivity Enhancements

Table 1-17 New Features and Enhancements in Release 2304 (continued)

• Create a new round plan instantly by copying the existing one. • Create a route to a round plan for operators to quickly navigate from one asset to another. For more information, see Create a Round Plan and Publish *(on page 166)*.
Add, Search, View, and Edit Plants Data • Add, edit / modify plants' data. • Search plants and view details. For more information, see Create Plants *(on page 232)*.
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 Assets *(on page 239)*.
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 Locations *(on page 236)*.
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. For more information, see Create Unit of Measurement *(on page 241)*.

Table 1-17 New Features and Enhancements in Release 2304 (continued)

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 *(on page 244)*.
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 248)*.
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, Create Users and Assign Roles *(on page 260)*.

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

System	Minimum Requirement
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. Execute Round Tasks with mRounds Mobile App

The chapter discusses the mRounds mobile application, outlining its features which include executing operator rounds, creating ad-hoc maintenance checks, adding shift logs, managing issues, and actions.

This chapter has the following sections:

2.1. Log in to the Mobile Application

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

This topic has the following sub-topics:

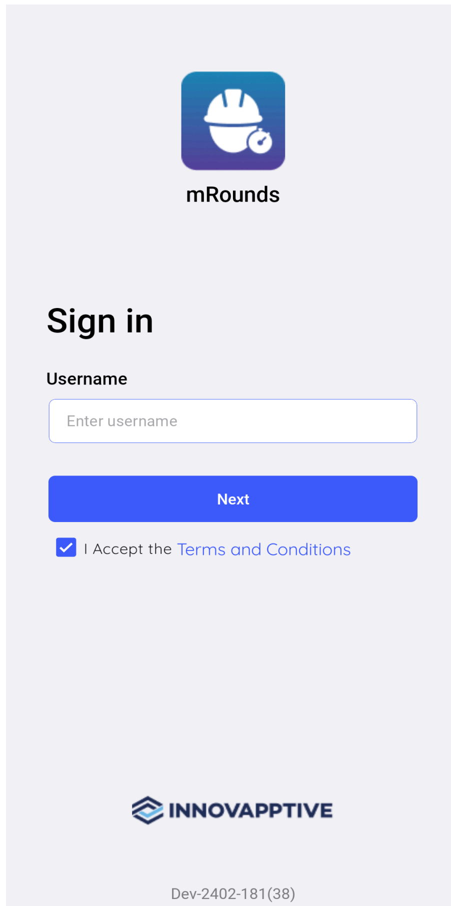
2.1.1. Log in for the First Time

You can log in to the mRounds application using the standard login procedure which involves entering a company or domain, username, and password. When users log in for the first time, additional tasks include creating a passcode, enabling Touch ID or Face ID for quick login.

To log in for the first time:

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

Figure 2-1 Enter Username

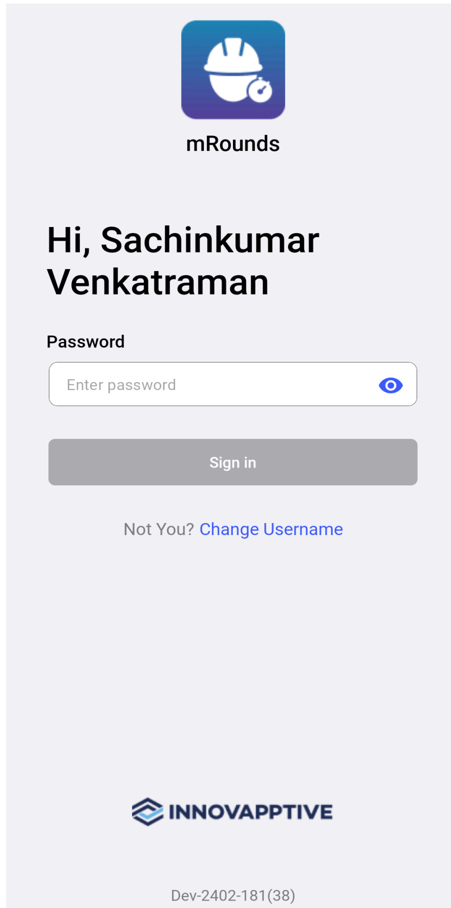


5. Tap **Terms and Conditions** to read End-User License Agreement (EULA) of Service.

Figure 2-2 Terms and Conditions

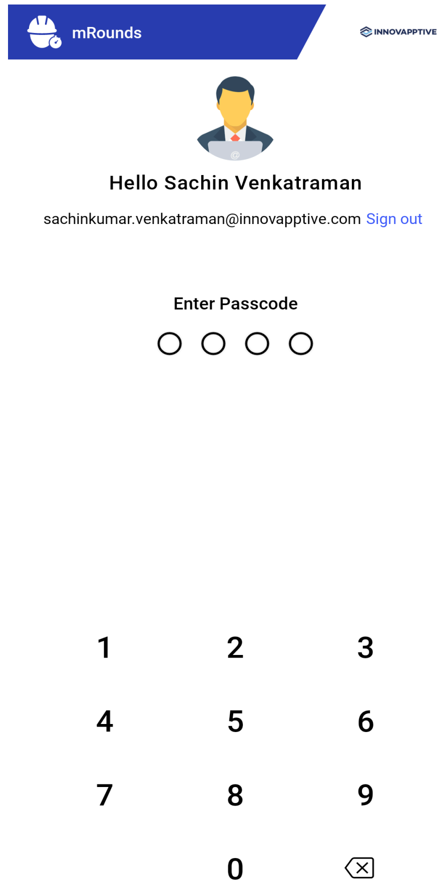
6. Tap **Next**.

Figure 2-3 Enter Password



7. Enter your **Password**.
8. Tap **Sign In**.

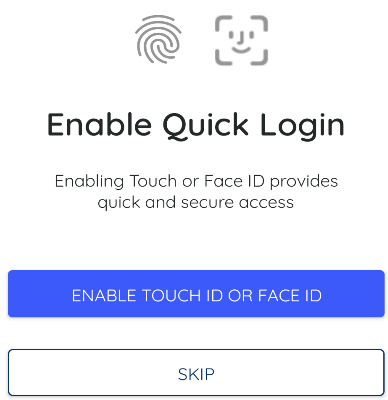
Figure 2-4 Create Passcode Screen



9. Create and confirm app passcodes.

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

Figure 2-5 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 Update User Preferences *(on page 109)*.
12. Tap **Save**.

    The application syncs the data based on the selected preferences and displays the Home screen. For more information, see Access Rounds in Offline Mode *(on page 69)*.

2.1.2. Log in with SAP IDP

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

> **Note:**
> This process is applicable only when the feature is configured by admin.

To log in using SAP IDP:

1. Open the mRounds application.
2. In the **Welcome** screen, enter **company** or **domain**.
3. Tap **Sign In**.
4. In the **Sign In** screen, enter your registered **Email**.
5. Tap **Next**.
6. In the **Enter Password** screen, enter **Password**.
7. Tap **Sign In**.
8. In the **Create Passcode** and **Confirm Passcode** screens, create and confirm app passcode.
9. In the **User Preferences** screen, select **Plant**, **Unit**, **Position**, **Shift**, and **Sync Task Reading History**.
10. Tap **Save**.

    The application syncs the data based on the selected preferences and displays the Home screen. For more information, see Access Rounds in Offline Mode *(on page 69)*.

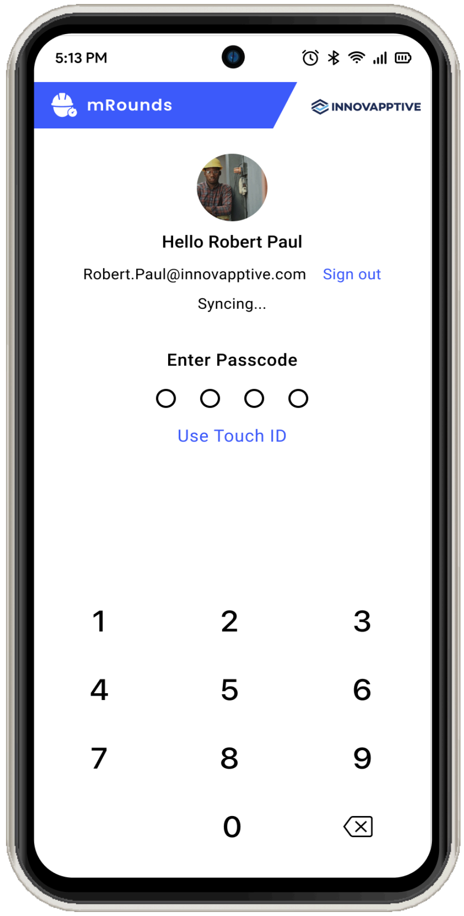
2.1.3. Log in as a Different User (Shift Handover Scenario)

When the previous shift user logs out, you will be on the **Passcode screen** from the previous user.

To log in as a different user:

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

Figure 2-6 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.

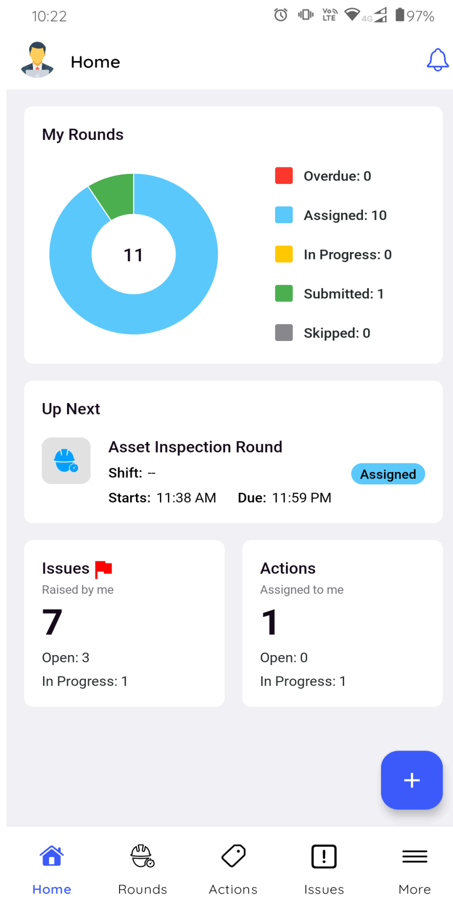
2.2. About the Mobile Application Screens

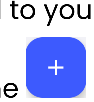
The mRounds application consists of five screens, each designed to help you efficiently manage rounds, execute rounds, create issues and actions, and update user preferences. Below is a detailed overview of each screen.

Monitor your Tasks (Home Screen)

The **Home** screen of the application helps you with the following:

Figure 2-7 mRounds Home Screen



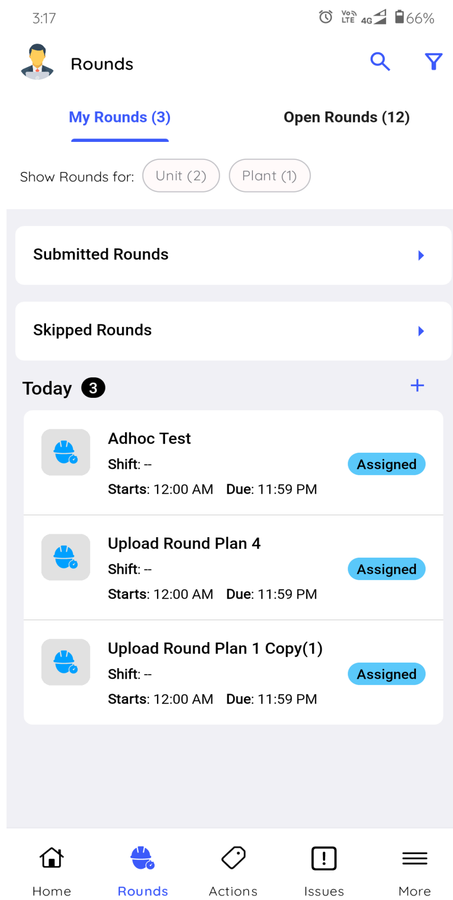
- View the rounds assigned to you and due for the day. These rounds are categorized as Overdue, Assigned, In-progress, Submitted, and Skipped statuses.
- View your next round task.
- View the number of Issues and Actions assigned to you.
- Create an issue, action, or shift log by tapping the  icon at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

View Assigned Rounds & Self Assign Rounds (Rounds)

The **Rounds** screen consists of two tabs: **My Rounds** and **Open Rounds**.

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

Figure 2-8 My Rounds

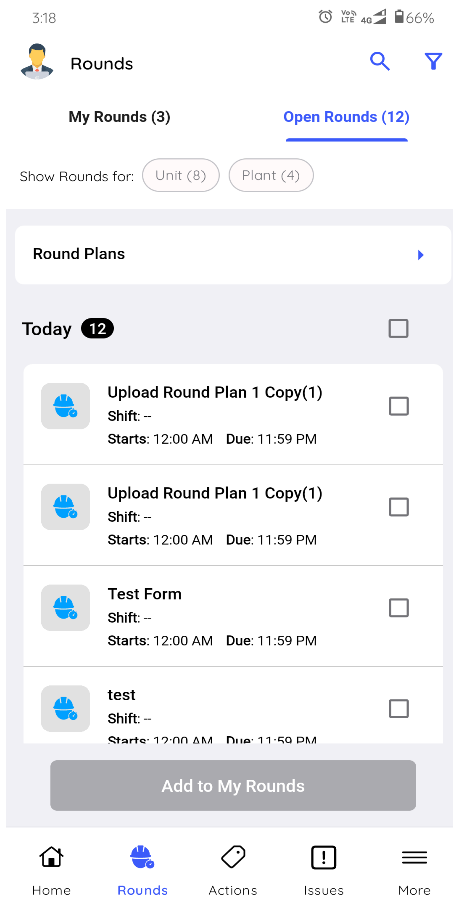


Note:

- Rounds that are overdue, skipped, or submitted are automatically excluded from the list after 24 hours.
- You can provide a reason for an overdue round by opening the round, tapping the More ••• icon on the top right, and tapping Overdue Reason.
- If your supervisors have provided a buffer time for a round while scheduling it, you can still complete round tasks after the due time and submit it. For more details, see Schedule Round Plans by Frequency *(on page 188)*.

Open Rounds: This tab displays rounds that are not assigned to any operator. You can select and assign a round to yourself. You can also search for rounds using the Search bar and filter them by Due Date, Created By, and Rounds (with or without User Group). Tap **Round Plans** to view and generate Ad-Hoc rounds.

Figure 2-9 Open Rounds

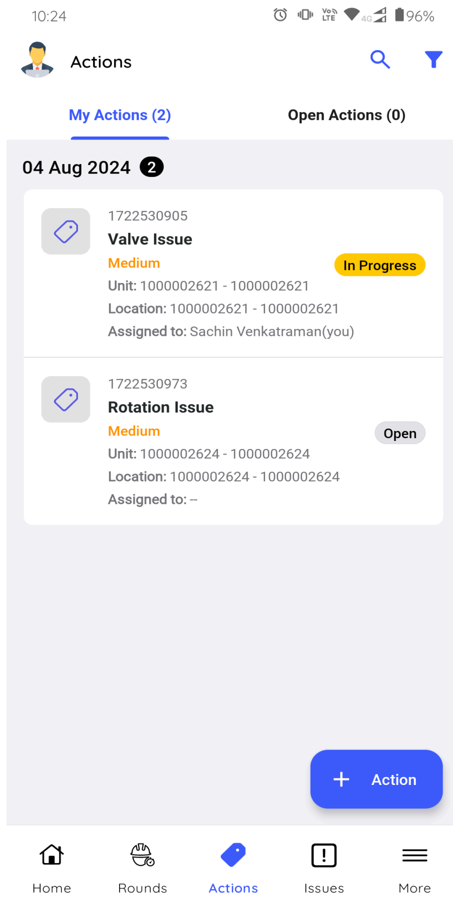


View Assigned & Unassigned Actions

Actions are follow-up tasks to rounds that are assigned to operators by Supervisors. **Actions** screen consists of two tabs: **My Actions** and **Open Actions**.

My Actions: This 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 2-10 My Actions



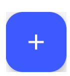
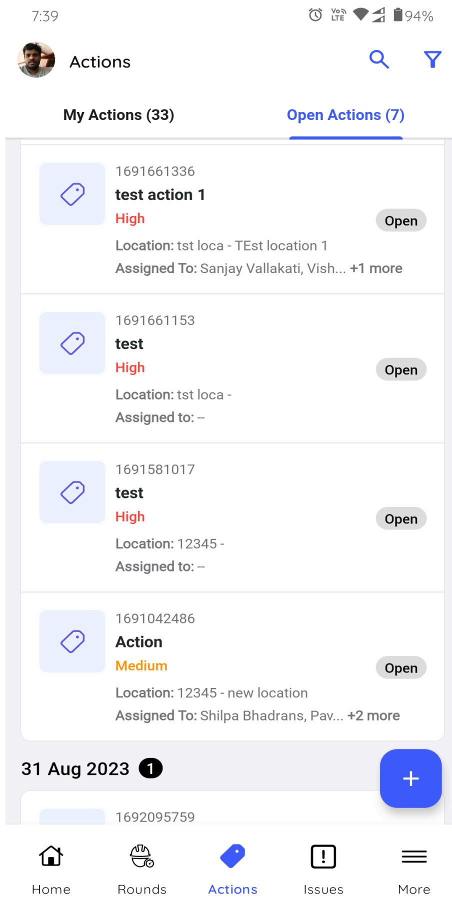
Open Actions: This tab displays actions that are created but not assigned to operators. You can search for actions using the Search bar and filter them by Due Date, Priority, Status, Plant, Location, Asset, Assigned to, Show actions created by me, & Hide Resolved. You can also create a new action using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

Figure 2-11 Open Actions

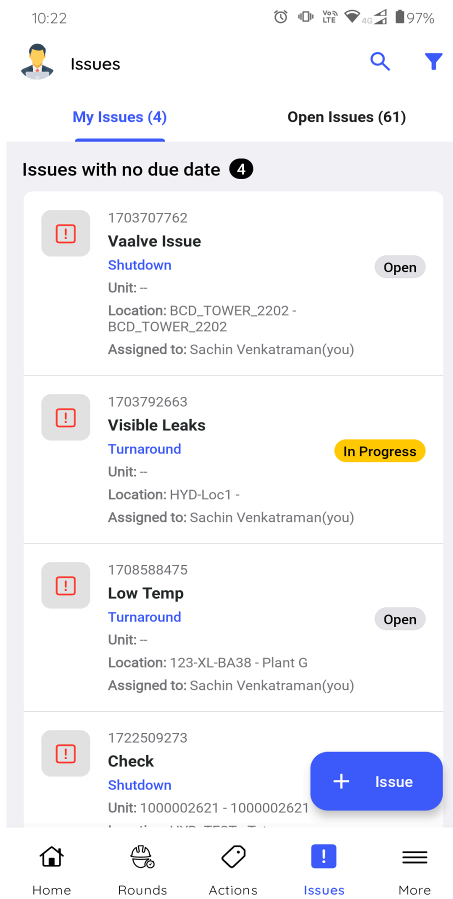


View Assigned & Unassigned Issues

Issue is created when an anomaly is identified during maintenance checks. The issue is then assigned to operators by supervisors. As an operator, you can update the log history to provide information about the issue. The **Issues** screen consists of two tabs: **My Issues** and **Open Issues**.

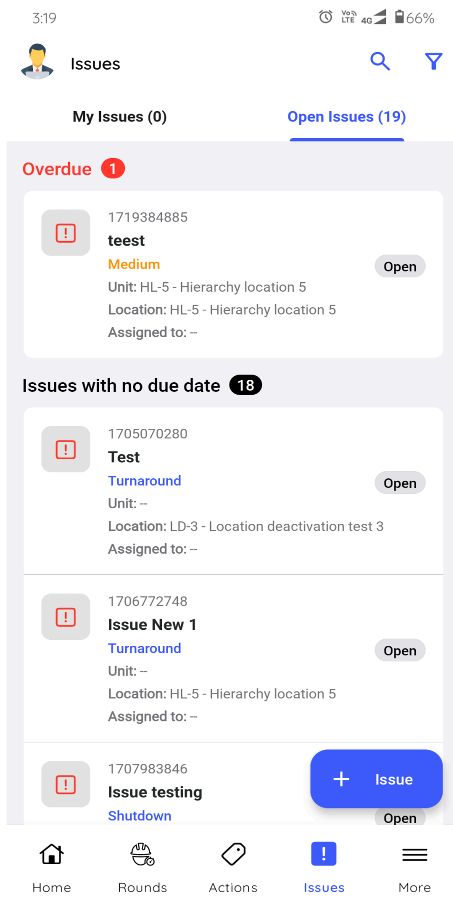
My Issues: This tab displays issues created by or assigned to the logged-in operator. You can search for issues using the Search bar and filter them by Due Date, Category, Priority, Status, Plant, Location, Asset, Assigned to, Show issues assigned to me, Show issues created by me, & Hide Resolved. You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

Figure 2-12 My Issues



Open Issues: This tab displays issues created by other operators. 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 created by me, & Hide Resolved. You can also create a new issue using the  icon in the Open Issues tab.

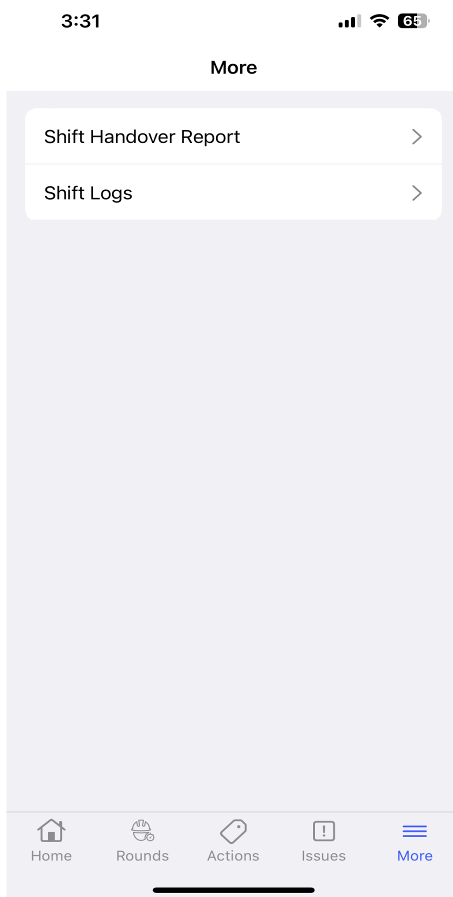
Figure 2-13 Open Issues



More

The **More** screen displays a list of shift handover reports and shift logs, and allows you to create new shift logs. You can search for shift handover reports and shift logs using the Search bar and filter them by Due Date, Category, Priority, Plant, Location, Asset, & Create By.

Figure 2-14 More Screen



2.3. Review and Accept the Shift Handover Report

Before you begin Round Tasks execution, review and acknowledge the shift handover report, summarizing the tasks completed, outstanding tasks, and any unresolved issues as part of the process. For more information about the Shift Handover Report, see Overview of Shift Handover Reports *(on page 214)*.

> **Note:**
> You cannot start a round if you do not acknowledge the Shift Handover Report. The Start Round button is disabled till you acknowledge the report.

To view and acknowledge shift handover report:

1. In the **Home** screen (Dashboard), tap the **Shift Handover Report**.

   Or

   Tap **Shift Handover Reports** in the **More** screen to see the list of reports.

Figure 2-15 Shift Handover Reports

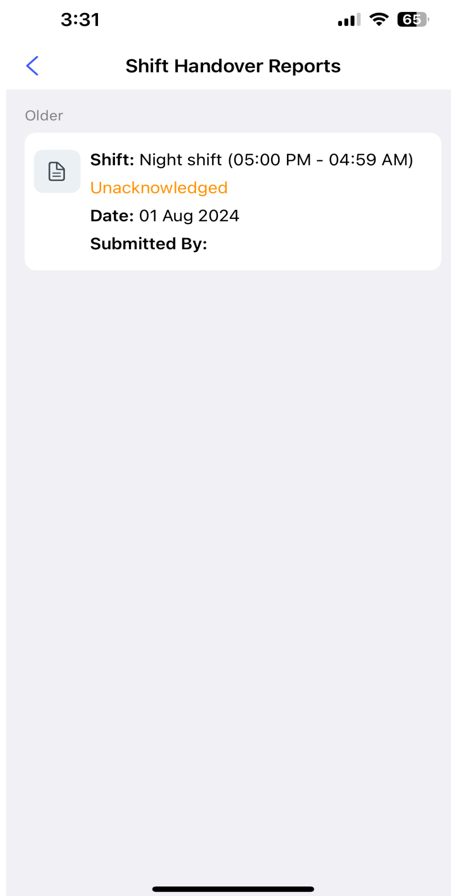
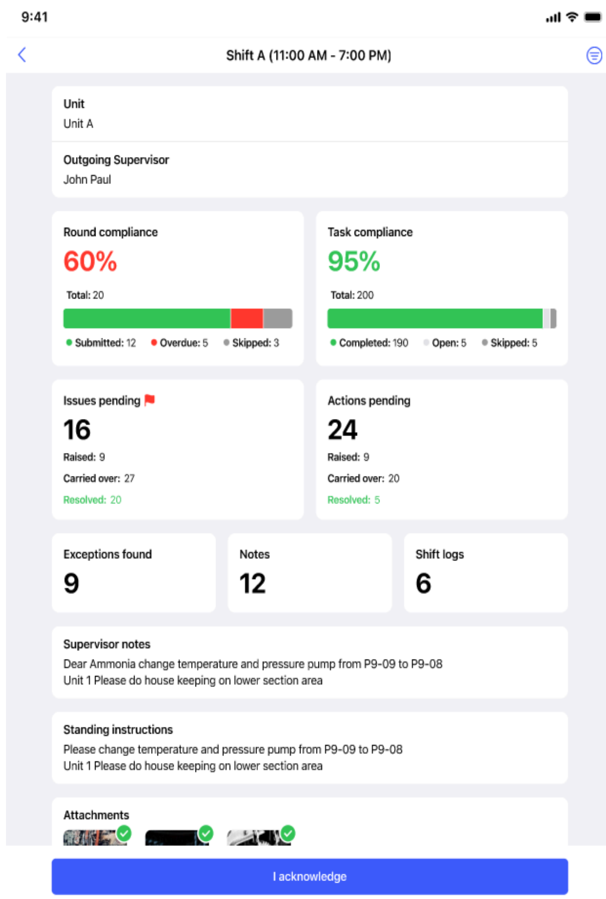


Figure 2-16 Acknowledged Shift Handover Report



The Shift Handover Report screen is displayed with the following details:

- **Unit or Plant**: View Unit or Plant details.
- **Outgoing Supervisor**: Outgoing supervisor who generated the report.
- **Round Compliance widget**: The percentage of rounds compliance along with the counts of Total, Submitted, Overdue, and Skipped rounds.
- **Task Compliance**: The percentage of task compliance and the counts of Total, Completed, Open, and Skipped tasks.
- **Issues Pending**: The count of pending issues. Tap the widget to view the list of pending issues and check each one individually.
- **Actions Pending**: The count of pending actions. Tap the widget to view the list of pending actions and check each one individually.
- **Exceptions Found**: The count of the exceptions that were found in the previous shift. Tap the widget to view the exception details, including Round Name, Asset/ Location Name, Range (If added) and any Warning, Alert, or Notes.
- **Notes**: Tap the widget to view the details of notes added by the operator.

- **Shift Logs**: The shift logs tile shows the count of the logs that are submitted by the previous user . Tap the widget to view the shift logs.
- **Supervisor Notes**: The notes added by the outgoing supervisor.
- **Standing Instructions displays**: The important instructions provided by the outgoing supervisor.
- **Attachments**: Attachments such as images or PDFs that are included in the report.

You can tap the Filter icon on top right to filter the details based on shift operators.

2. Review the above details and tap **I acknowledge** to confirm that you acknowledge and accept responsibility for all pending tasks and unresolved issues.

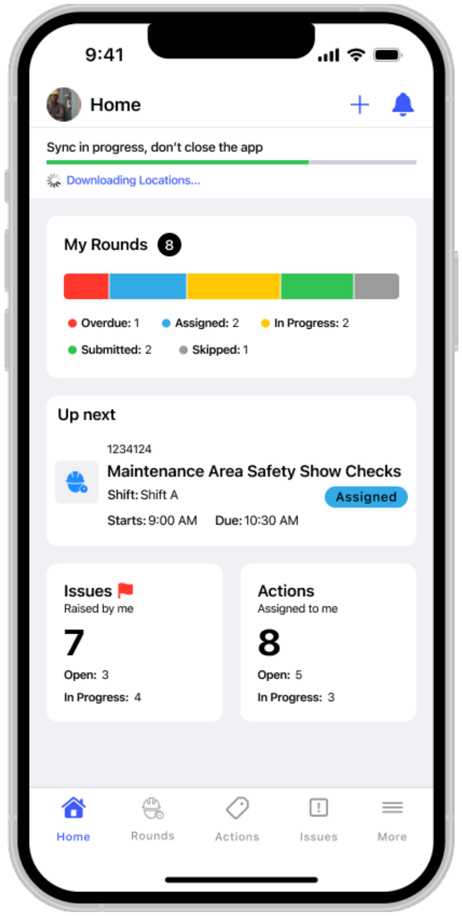
   The status changes to Acknowledged in the Dashboard, and you can start the round.

2.4. Access Rounds in Offline Mode

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

When you log in to mRounds, the app automatically connects to the server and downloads data to your device. As an Operator, you can execute all round tasks 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 Offline Sync



2.5. Self Assign and Unassign Rounds

This section explains how to self-assign rounds, unassign rounds, and create ad-hoc rounds.

This section has the following topics:

- Assign Open / Unassigned Rounds to Yourself *(on page 70)*
- Create Ad-Hoc Rounds *(on page 72)*
- Unassign Assigned Rounds *(on page 74)*
- Unassign In Progress Rounds *(on page 75)*

2.5.1. Assign Open / Unassigned Rounds to Yourself

If no rounds are assigned to you, you can self-assign open or unassigned rounds.

To self-assign a round:

1. In the **Rounds** screen, tap the **Open Rounds** tab.
2. Open the round you want to assign yourself.

> **Note:**
> You can select different categories such as **Position**, **Operator**, **User Group**, **Unit**, and **Plant**, to view the respective rounds.

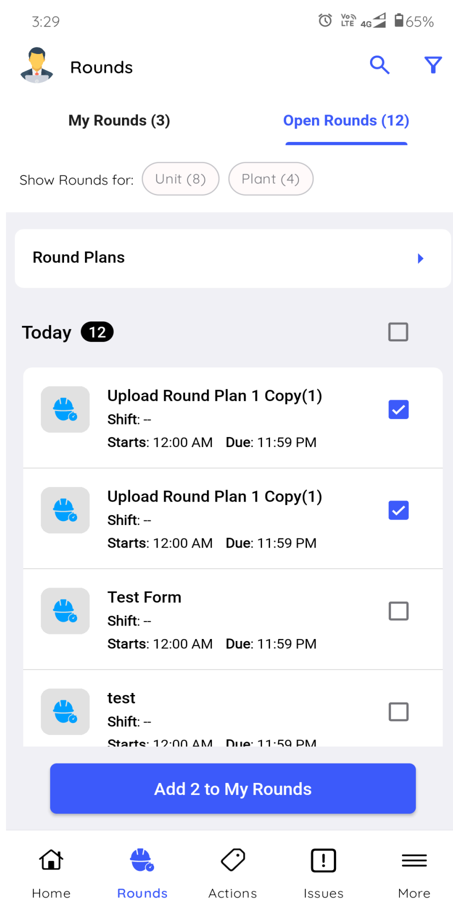
3. In the **Round Details** screen, verify the details and tap **Add to My Rounds**.

   Or

Tap **Start Round** to assign the round to the relevant user and remove it from Open Rounds for other users.

Note:
To assign multiple rounds to yourself at one go, check the checkboxes next to the rounds and tap **Add to My Rounds**.

Figure 2-18 Self-assign Rounds



Selected rounds are assigned to you and displayed in the **My Rounds** tab.

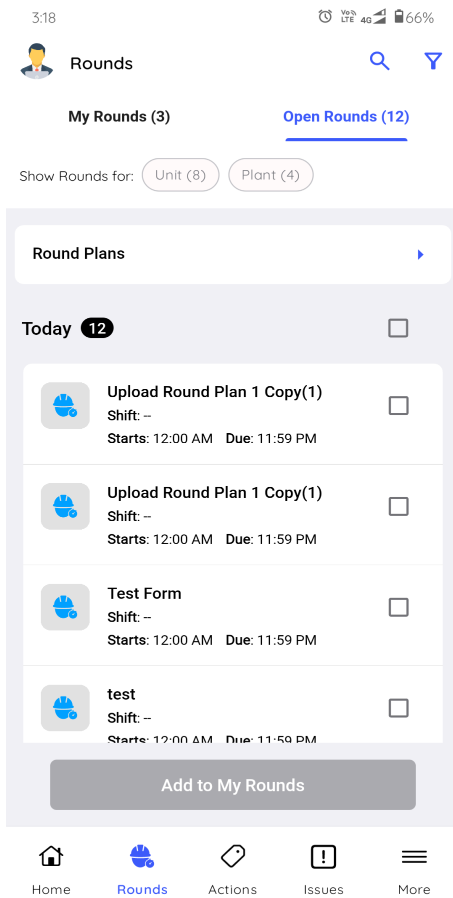
2.5.2. Create Ad-Hoc Rounds

Creating ad hoc rounds allows you to initiate unplanned inspections or tasks without needing a pre-configured round from the supervisor. This feature is particularly useful for urgent maintenance tasks, unexpected issues, or quick checkups that are not part of the scheduled rounds.

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

1. Tap the **Open Rounds** tab.

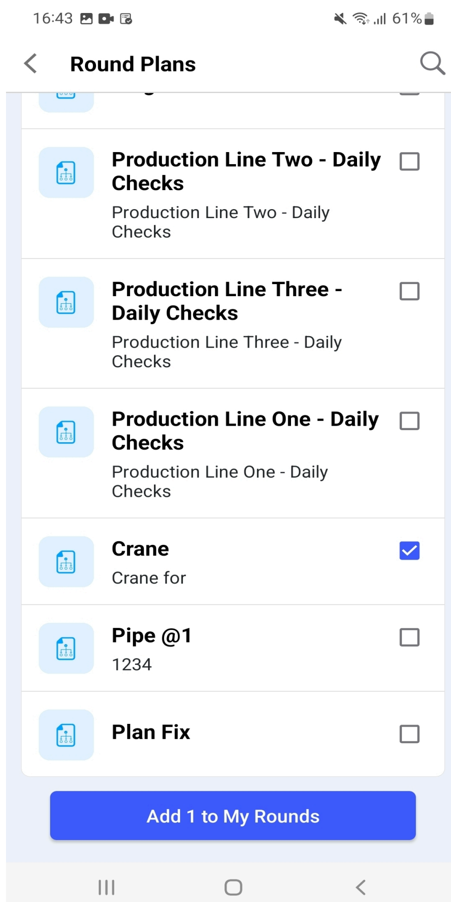
   Figure 2-19 Round Plans Section

2. Tap on the **Round Plans** section.
3. Choose the pre-defined round plan from the options for the plant.

   For example, if you find an issue with pressure value, this **Rounds Plans** section will have a ready or pre-defined round plan template with Pressure Value tasks. Choose that plan.

Figure 2-20 Select Rounds



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

   The round is added to the My Rounds tab with Assigned status. You can execute it like a regular round plan.

   Rounds generated from the mobile app are visible in the web app in the Rounds tab of the Scheduler screen.

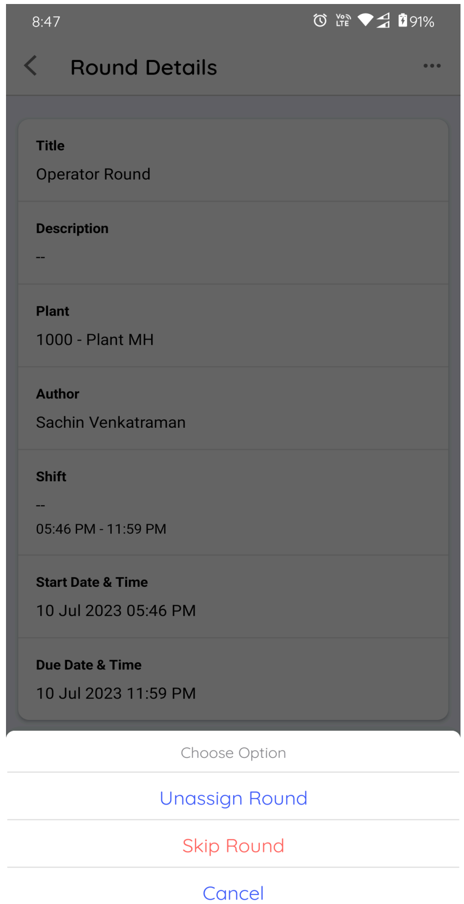
2.5.3. Unassign Assigned Rounds

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

To un-assign an Assigned round:

1. In the **Rounds** screen, tap the **My Rounds** tab.
2. Select the round with the **Assigned** status.
3. In the **Round Details** screen, tap the More ●●● icon and select **Unassign Round**.

Figure 2-21 Unassign Assigned Round



A message "Are you sure you want to Unassign the round?" is displayed.

4. Tap **Unassign**.

The round is removed from your assigned tasks and is made available for reassignment.

2.5.4. Unassign In Progress Rounds

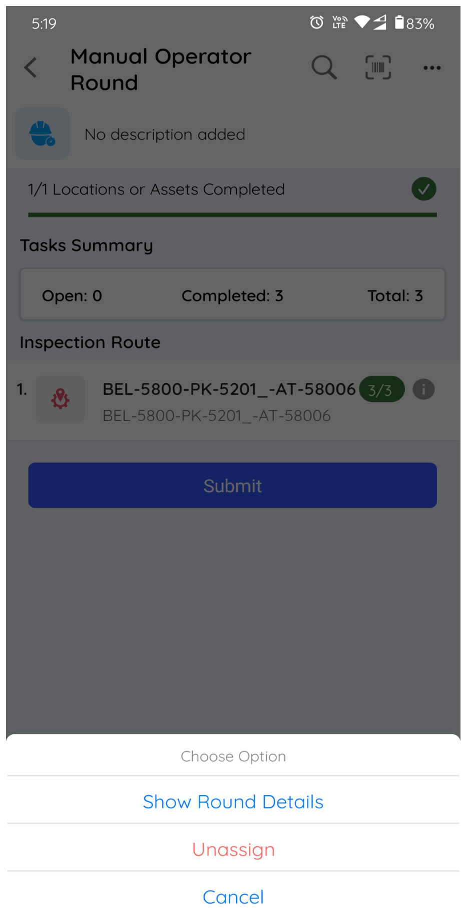
If unable to work on assigned rounds, you have the option to un-assign them, allowing other operators to take over and complete the rounds.

This feature enables reassignment flexibility, facilitating maintenance scheduling adjustments.

To un-assign an In-Progress round:

1. In the **Rounds** screen, tap the **My Rounds** tab.
2. Select the round with the **In Progress** status.
3. In the **Round Details** screen, tap **Resume Round**.
4. Tap the More ●●● icon on the top right of the screen and select **Unassign Round**.

   Figure 2-22 Unassign In-progress Round

   A message "Are you sure you want to Unassign the round?" is displayed.
5. Tap **Unassign**.

   The data that is recorded till then is saved and the round is displayed with **Partly Open** status. The round is marked incomplete and is made available for others.

2.6. Execute Rounds and Record Asset Data

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

This section has the following topics:

2.6.1. Execute Rounds with mRounds Mobile App

As an operator, your role is to execute rounds that have been pre-configured by supervisors. These rounds include various response types that you need to be familiar with to capture asset data accurately. Each response type serves a specific purpose, from scanning the asset to verifying your location with geo-location, to capturing photographic evidence of equipment conditions. Conditional logic ensures that if any data you enter falls outside acceptable limits, follow-up actions or alerts are automatically triggered.

Important: You receive push notifications on your mobile device one hour before the round that is assigned to you becomes overdue. This ensures that you do not miss important reminders. You can tap the notification to access and work on the round, issue, or action on priority.

For smooth and error-free execution of rounds using the mRounds app, follow the instructions listed in these sections.

Find the Ideal Route

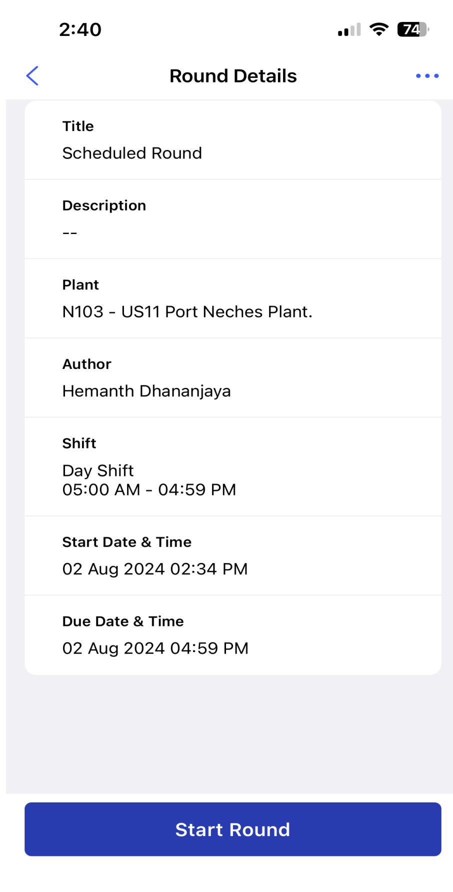
Before starting the round, determine the ideal route for completing the tasks efficiently. This ensures that all tasks are completed in the most logical and time-saving manner.

1. In the **Rounds** screen, tap the **My Rounds** tab.
2. Select a round from the assigned rounds list.

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

> **Note:**
> - If you want to skip the round, tap the More ••• icon on the top right and select **Skip Round** and choose a reason such as Plant Shutdown, Insufficient Resources/Spares, Locations/Assets Inaccessible, Environmental Hindrance, Safety Concerns, or Others. This skipped round is displayed in the **My Rounds** tab with the Skipped status and then removed after 24 hours (configurable)
> - If you want to skip, tap the **More** and select **Skip Asset/Location**. The selected asset / location is skipped along with the associated tasks.

Figure 2-23 Start Round



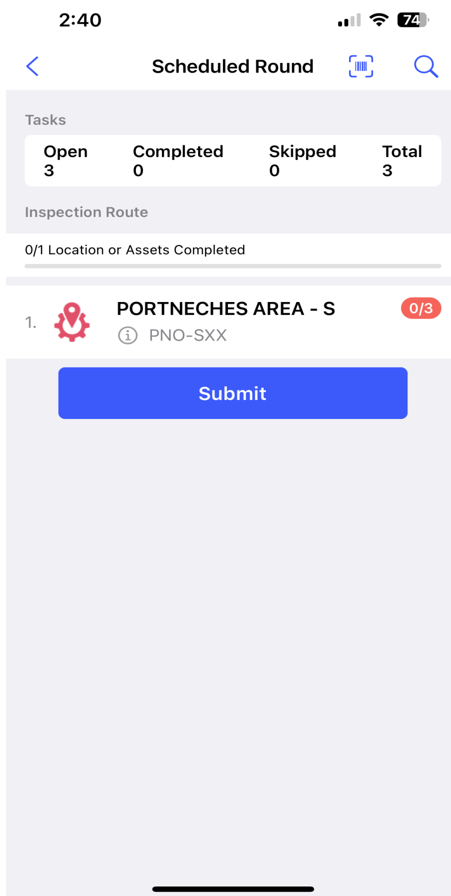
3. Tap **Start Round**.

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

   The Assets Route sceen is displayed where you can view the list of assets that require rounds tasks execution in that route.

4. View the ideal route map that you must follow to execute the tasks quickly in the Assets Route screen.

   Figure 2-24 Assets Route



In this screen, you can,

- View the progress of the round execution by checking the progress bar at the top. You can view **Open**, **Completed**, **Skipped** and **Total** number of tasks associated with the round under **Tasks Summary**.
- View and access the assets list under the **Inspection Route** section with the count of completed locations or assets.

> **Note:**
>
> Tap the Info icon, to see the Asset details hierarchy

Scan and Verify Assets

Scan the asset to capture its details and verify that you are executing the round task for the correct asset. This verification step ensures accuracy and prevents errors in round execution. If you're unable to scan an asset, tap the Skip button in the top right corner. When skipping, select one of these reasons:

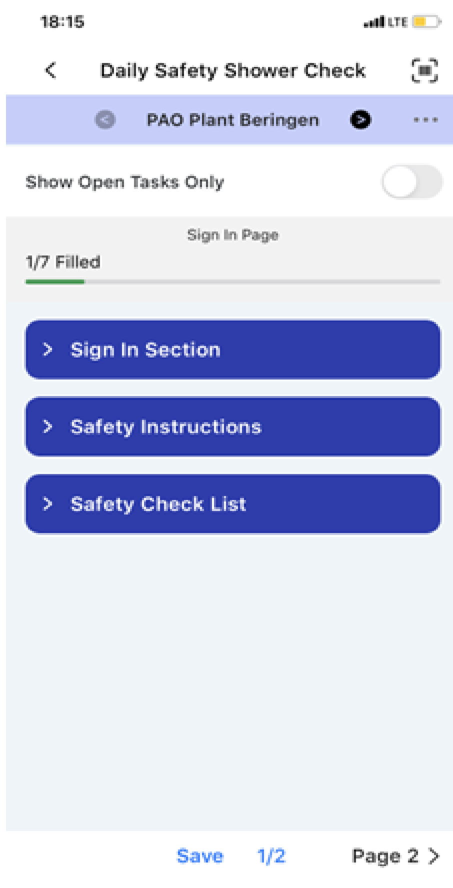
- Out of service
- Damaged barcode
- Inaccessible location
- Turnaround period
- Other (specify reason)

> **Note:**
>
> The Asset Scan feature is available based on the plant's configuration. When you choose a plant that has scanning enabled, you will see the scan option. If you switch to a plant where scanning is disabled, the scan option does not appear.

1. Tap **Scan Asset** in the mRounds mobile app.
2. Use your device to scan the asset's barcode or QR code.

   The round tasks assigned to the asset are displayed.

Figure 2-25 Asset Details with Tasks



Productivity Hacks:

- Move the **Show Open Tasks Only** slider. The screen displays only open tasks and you can quickly start working on them.
- Tap **Page 1**, **Page 2**, **Page 3**, and so on buttons to navigate through the pages.

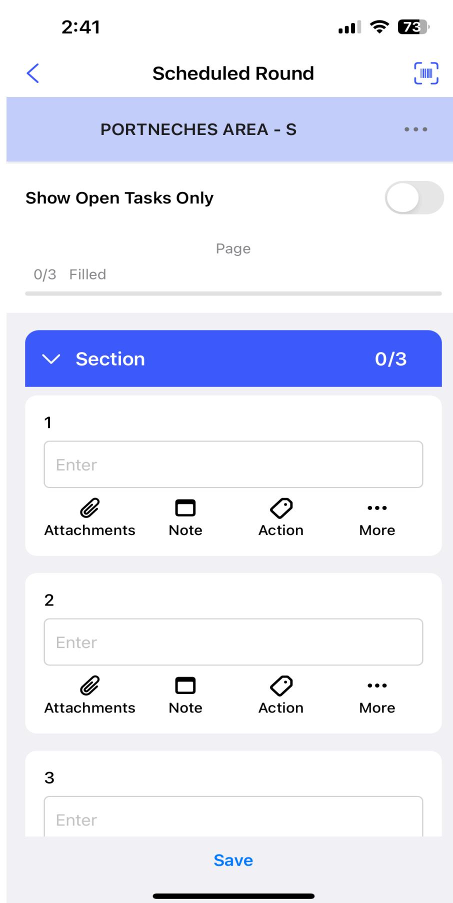
Note:

- The Tasks Summary section displays the count of skipped tasks within each asset, and the progress bar excludes skipped tasks from the completed count.
- The skipped assets / locations and tasks appear in the PDF report.
- To unskip a task, unskip the entire asset/location and then tap **Unskip** next to the skipped task.

Execute Rounds

At this stage you begin to inspect the asset and record data. Expand each section in a page to fill the details in the task as you do the maintenance checks.

Figure 2-26 Expand Sections



1. Fill in the details in the task using the choices available for the tasks.

   The choices are

   - Read Only Field
   - Text Answer
   - Number
   - Check box
   - Scan
   - Date and Time
   - Slider

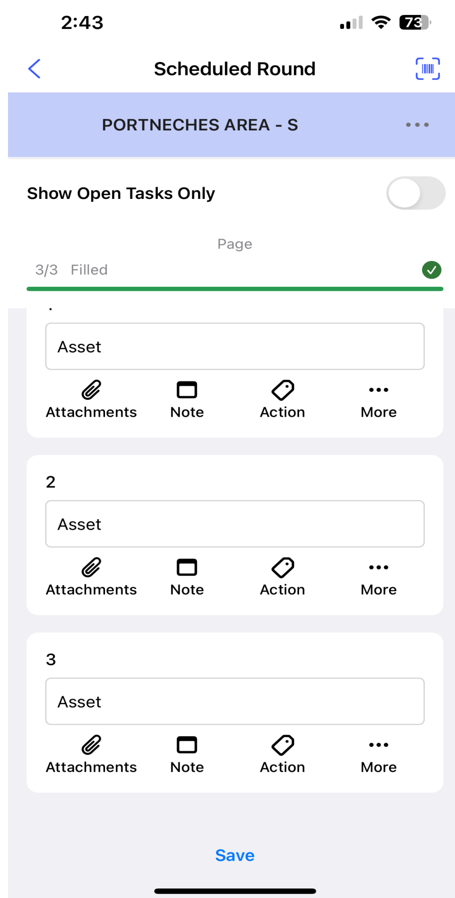
     Note:
     The previous readings are presented as a line chart for Number and Slider response types, highlighting past readings or transactions. The charts display task names, dates, readings, and operators for each entry, providing detailed insight into the data history. You can quickly compare current readings with previous ones, and make informed decisions on the spot. To view the previous data, tap on **Exceptions** below the Number or Slider response type.

   - 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 tasks that have a number response type.

   The auto-scroll option allows you to automatically scroll to the next unanswered question when a response is provided for specific input types.

Figure 2-27 Fill Responses and Execute Tasks



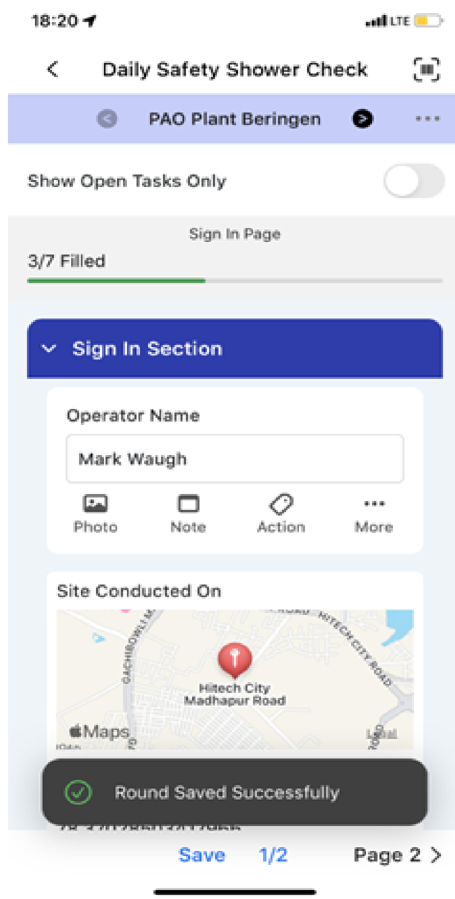
Productivity Hack:

- You can tap the **Actions** icon to create an action for the asset while executing a round. For more information, see Create Actions for Unresolved Issues or Tasks *(on page 97)*.
- Tap the **More** ••• icon > **Create Issue** to create an issue for the asset. For more information, see Create an Issue *(on page 91)*.
- Tap the **More** ••• icon > **Show Additional Details** to view additional details or more information regarding the task.

2. Tap **Page 1**, **Page 2**, or **Page 3**... to navigate.

Tap **Save** to pause. This saved round appears in the **My Rounds** tab under the In Progress section.

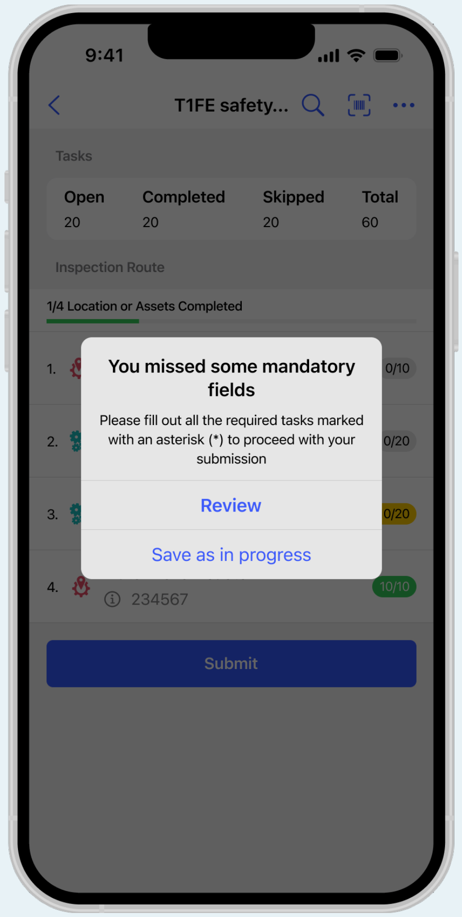
Figure 2-28 Save Round



3. Tap the **Submit** button, after filling in all the details.

Note:
If there are pending or open tasks, data in the fields not filled in, or if the round is partially completed, the app will not let you submit. Tap **Review** to review complete the pending tasks or tap **Save** to pause and complete it later.

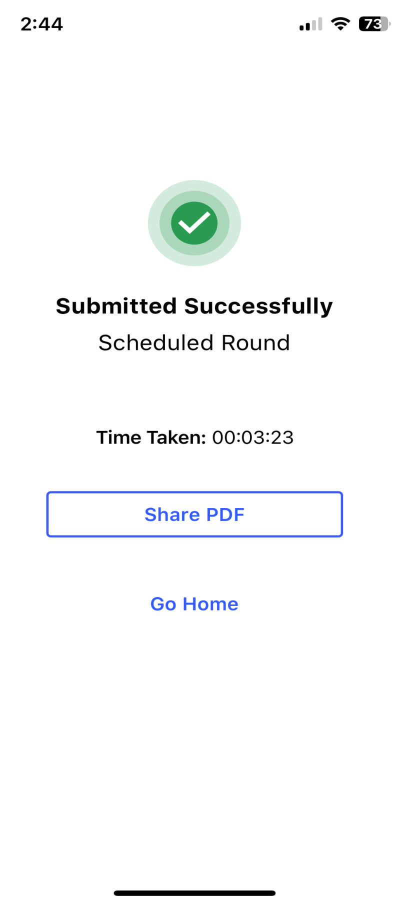
Figure 2-29 Submit Round



4. If all mandatory details are filled, a Submission Confirmation pop-up appears.

5. Tap **Submit**.

Figure 2-30 Submit Round Success Message



A message "Round Submitted Successfully" appears with the **Share PDF** and **Go Home** buttons.

The timer stops once the round is submitted and you can view the duration of the round execution.

2.6.1.1. Prepare Shift Handover Report

Prepare shift handover report by adding notes, attachments, and other relevant information pertaining to the rounds or tasks completed during the shift.

To prepare shift handover report:

1. 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:**
> These attachments appear as links in the Shift Handover Report PDF.

2. Tap the **Note** icon to add notes.
3. Select the **Add note to Shift Handover Report** check box.
4. Tap **Save**.

2.6.2. Generate Submitted Rounds in PDF Format

You can generate and share submitted rounds as PDFs, providing stakeholders with details on completed tasks, asset conditions, and unresolved issues.

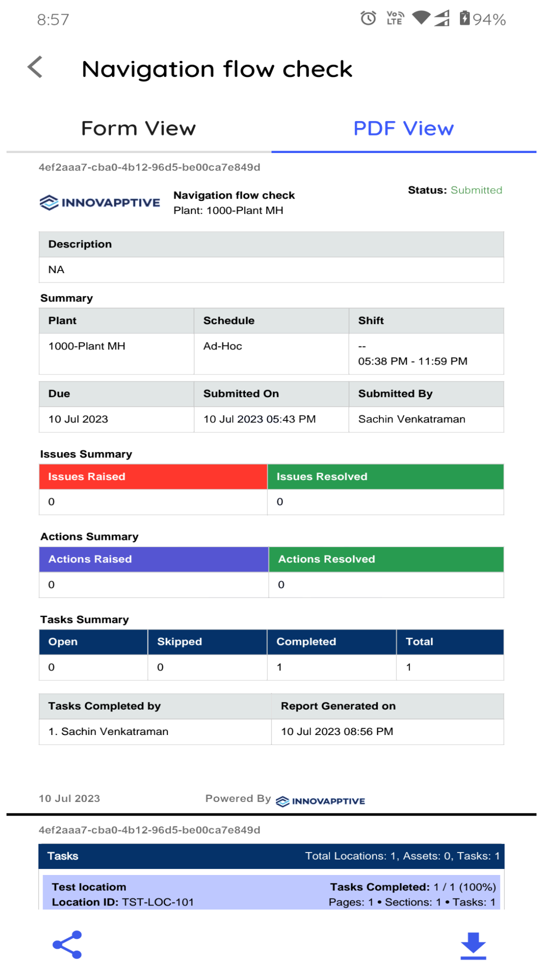
To generate and share the submitted rounds in PDF format:

1. In the **Rounds** screen, tap on the **Submitted Rounds** section.
2. In the **Submitted Rounds** screen, open the submitted round.
3. In the **Round Details** screen, tap **Show Round**.

> **Note:**
> 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 round details in Form format.
5. Tap the **PDF View** tab.
   A message "PDF Generated Successfully" appears, and you can view the submitted round details in PDF format.

Figure 2-31 View Round in PDF Format



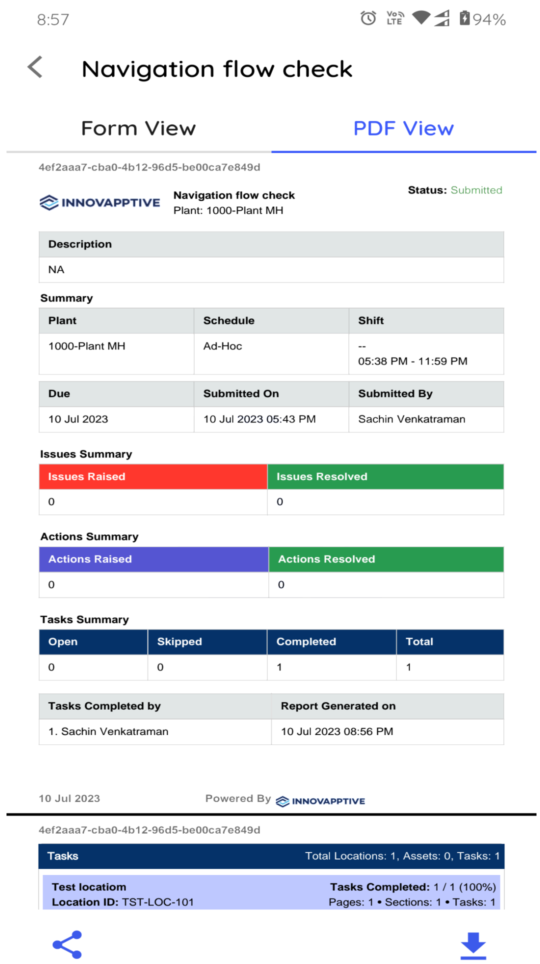
2.6.3. Share PDF Report with Stakeholders

Before sharing the report, review the document to ensure that information is accurately captured.

To share a report in PDF format with stakeholders:

1. In the **PDF View** tab, tap the Share icon.

Figure 2-32 View Round in PDF Format



2. Choose the method to share the document. You can choose Email, WhatsApp, or other messaging platforms.
3. Choose the email option.
4. Enter the recipient's email address or select it from contacts.
5. Add your comments in the email body, if any.
6. Tap **Send**.
7. Tap 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 181)*.

2.7. Create and Manage Issues

Effective issue management is critical for maintaining operational efficiency and ensuring that equipment issues are addressed promptly. You can create, assign, resolve and close issues for anomalies identified during rounds to ensure proper tracking and resolution.

This chapter has the following topics:

2.7.1. Create an Issue

Create an issue when you find an anomaly while executing round tasks that require further investigation.

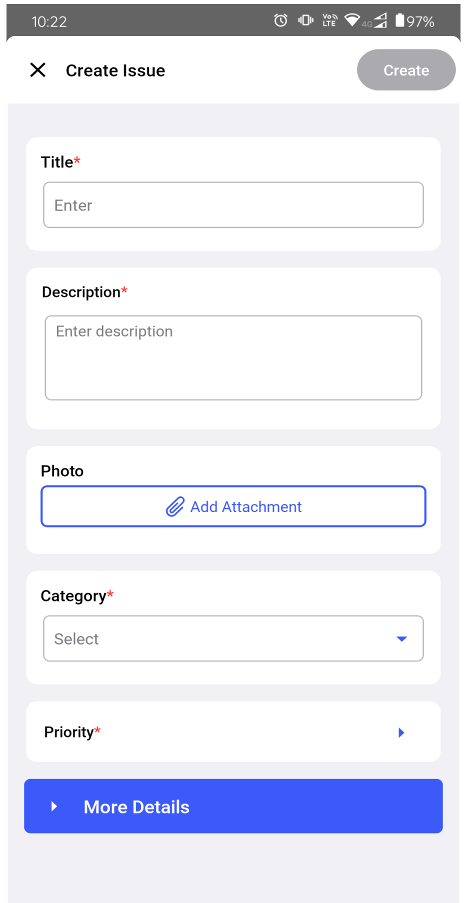
To create an issue:

1. In the **Issues** screen, tap the Add Issue + icon 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 list.

    > **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** and select the **Event Execution** as **Shutdown**, **Turnaround**, or **General** from the list.

Figure 2-33 Create Issue



f. Expand the **More Details** section, do the following:

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

> **Note:**
> The Plant and Unit values auto-populate if they are already selected in the User Preferences screen.
>
> When you scan an asset, these details are instantly added.

ii. Select an operator from the **Assign to** drop-down to assign the issue. Tap **Save** once you select the users.

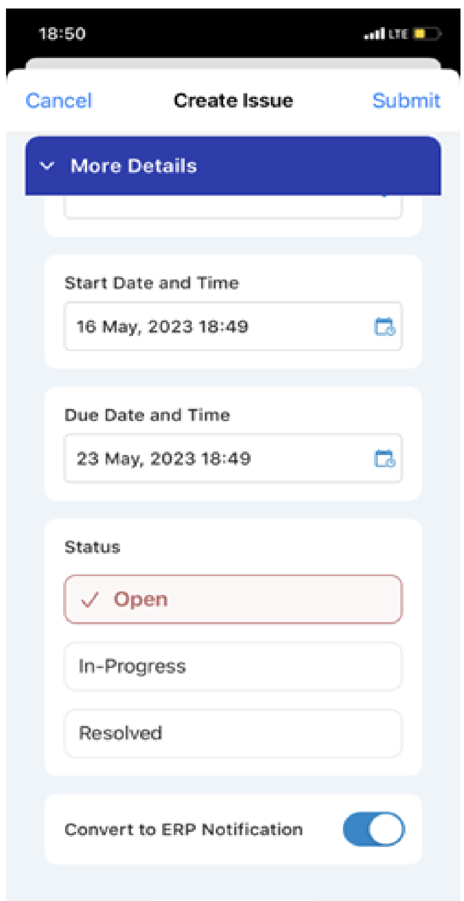
iii. Select the **Start Date and Time**.

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

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

g. Switch the **Yes** toggle in the **Convert to ERP Notification** field if you want to convert the issue to notification.

Figure 2-34 Fill More Details



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

   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.

2.7.2. Self-Assign an Unassigned Issue

When you identify an issue that is logged but not assigned, you can assign it yourself.

To self-assign an issue unassigned issue:

1. In the **Open Issues** tab, open an unassigned issue.
   Issue chat box or log history is displayed.

   Figure 2-35 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. In the **Assigned to** field, select your username.
5. Change the status of the issue to **In Progress**.
6. Tap the **Save** button.

   The issue now appears in the **My Issues** tab.

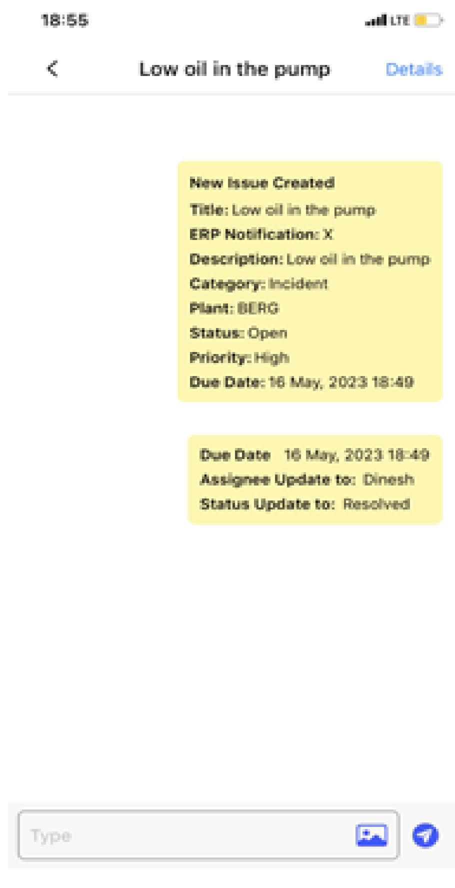
2.7.3. Resolve and Close an Issue

You can close an issue once it is resolved.

To resolve and close 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 2-36 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 and change the **Status** to **Resolved** when the issue is resolved.
6. Tap **Save**.

   The issue is now marked as Resolved, and relevant teams are notified.

2.8. Create and Manage Actions

Managing actions is crucial for addressing critical tasks identified during rounds. Create an action to follow up on an issue that is marked resolved and close it once you review and gather the required information.

This chapter has the following topics:

2.8.1. Create Actions for Unresolved Issues or Tasks

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

To create an action:

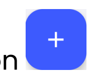
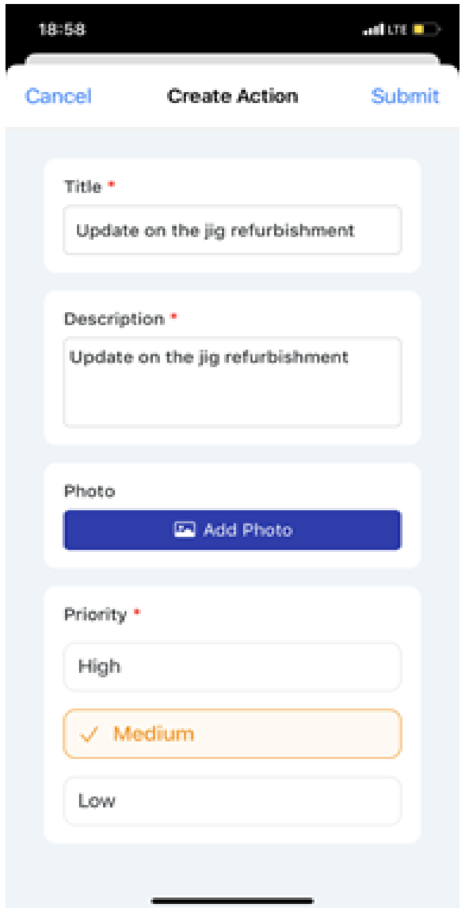
1. In the **Actions** screen, tap the Add Action  button at the bottom.
2. In the **Create Action** screen, do the following:
    a. Enter the action title in the **Title** field.
    b. Enter the action description in the **Description** field.
    c. Tap the **Add Photo** button in the **Photo** field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

Figure 2-37 Create Action



e. Expand the **More Details** section, do the following:

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

> **Note:**
> The Plant and Unit values auto-populate if they are already selected in the User Preferences screen.
>
> Scan the asset and the app automatically adds these details.

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

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

  Or

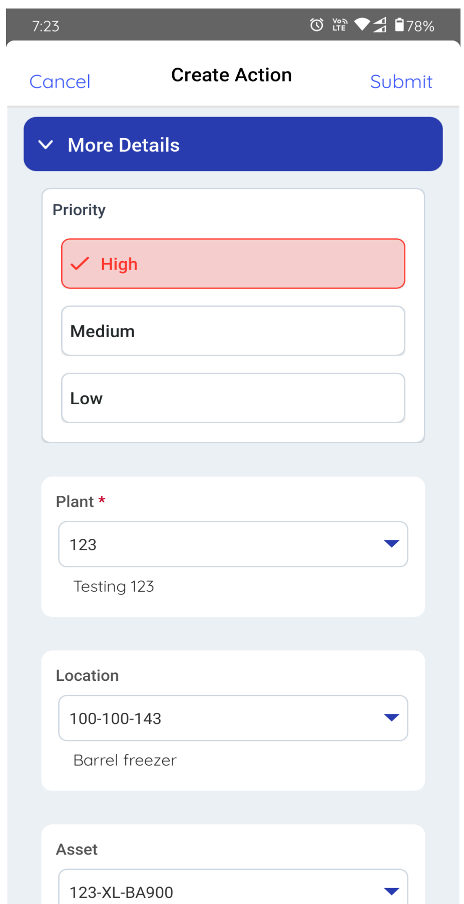
- Choose **Usergroup** and select user groups from the list.
- Tap **Save**.

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

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

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

Figure 2-38 More Details



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

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.

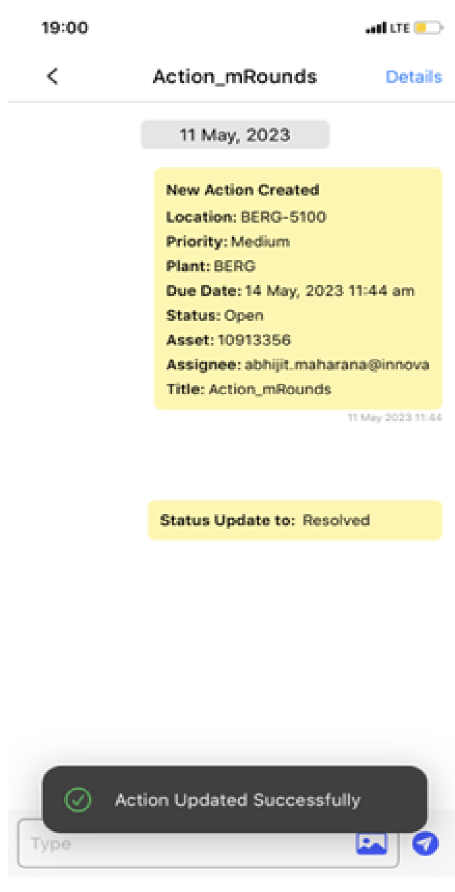
2.8.2. Self-Assign an Unassigned Action

When you come across an unassigned action during your shift, you can assign it to yourself and act on it.

To self-assign an unassigned action:

1. In the **Open Actions** tab, open an unassigned action.
   Issue chat box or log history is displayed.

   Figure 2-39 Actions Log History

2. Tap the **Details** button on the top right.
   Action Details screen is displayed.
3. Tap the **Edit** button on the top right.

4. In the **Assigned to** field, select your username.
5. Change the status of the action to **In Progress** to indicate active work on it.
6. Tap the **Save** button.

   The action now appears in the **My Action** tab, and you're responsible for resolving it.

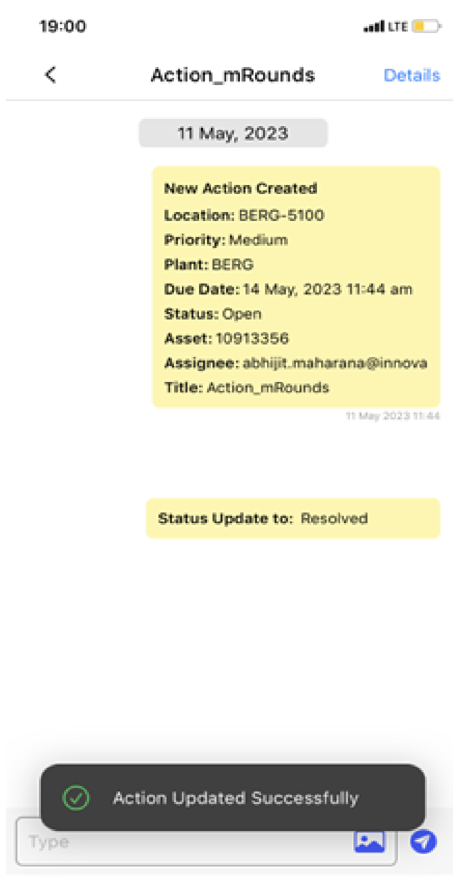
2.8.3. Resolve and Close an Action

You can close an action when it is resolved.

To resolve and close the action:

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

   Figure 2-40 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 and change the **Status** to **Resolved** when the action is resolved.
6. Tap the **Save** button.

   The action is now marked as **Resolved**, and relevant teams are notified.

2.9. Log Shift Activities

Shift logs are essential for recording key activities and events that occur during a shift. They document actions taken, issues encountered, and the status of tasks, keeping both you and your supervisors informed about ongoing operations.

By maintaining shift logs, teams can track progress and identify any problems that need attention. This ensures that nothing is overlooked and everyone stays on the same page.

Shift logs also facilitate shift handovers, providing incoming shifts with a clear understanding of completed tasks and pending issues, ensuring that important concerns are addressed on time.

To add shift logs:

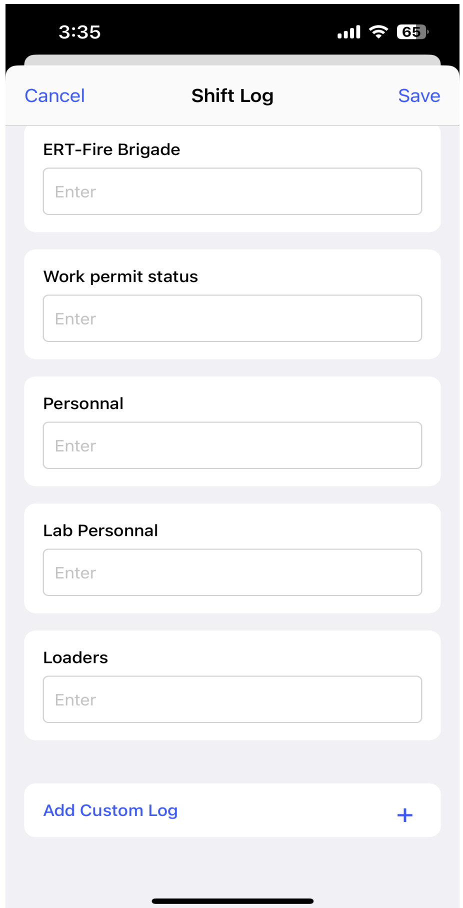
1. In the **Home** screen, tap the Add icon and select **Create Shift Log**.

   > **Note:**
   >
   > You can also create the shift log in the following ways,
   > - In the **More** screen, tap **Shift Logs**, select log entry, tap the Add icon to add the shift log.
   > - Open the round, tap **Start Round**, tap More icon next to the asset/location name and select **Create Shift Log** to add the shift log.

2. In the **Log Entry** screen,

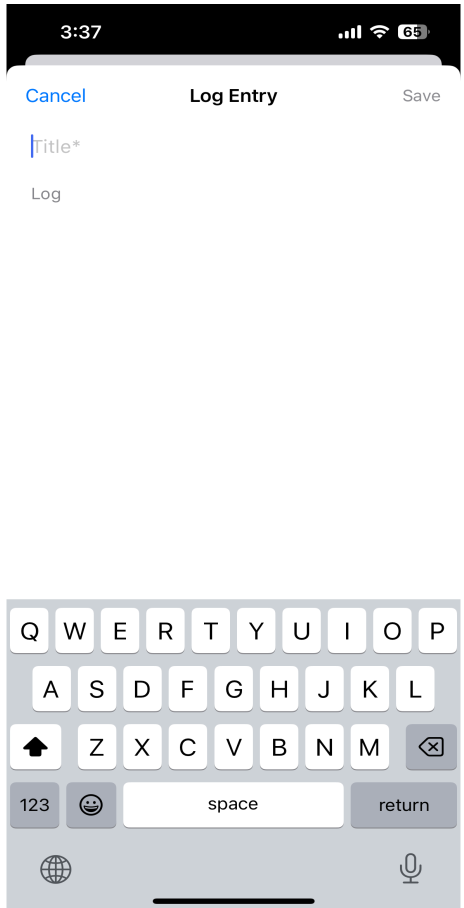
a. Add the sift log details in the pre-defined template.

Figure 2-41 Add Shift Log



b. Tap **Add Custom Log**, enter the **Title** and **Description** of the log.

Figure 2-42 Add Custom Log

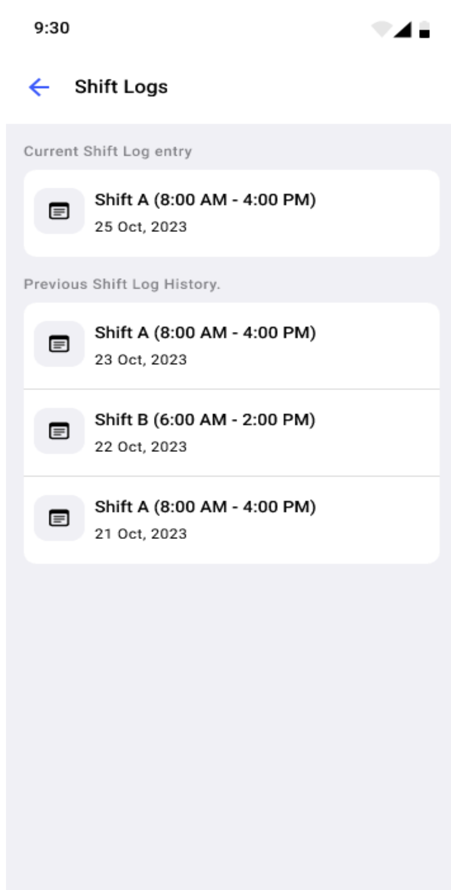


c. Tap **Done**.

3. Click **Save**.

The shift log is created and displayed under Shift Logs in the **More** screen.

Figure 2-43 Shift Logs Screen



2.10. Find and Manage Rounds, Issues, and Actions

Search and filters help you to find the relevant rounds, issues, and actions quickly based on criteria such as status, priority, date, or assigned personnel. These tools allow you to streamline task management, ensuring nothing is overlooked or delayed.

This chapter has the following topics:

- Search for a Round, Issue, or Action *(on page 105)*
- Apply Filters to Refine Results *(on page 106)*

2.10.1. Search for a Round, Issue, or Action

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

To search rounds, issues, and actions:

1. Tap on the **Search** bar at the top of the **Rounds**, **Issues**, or **Actions** screen.
2. Type the name or keyword related to the round, issue, or action you're looking for. For example: Enter Boiler Inspection to locate rounds related to boiler inspections.

   The search results display all rounds, issues, or actions that match your keyword.
3. Tap the result to view or update the round, issue, or action details.

2.10.2. Apply Filters to Refine Results

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

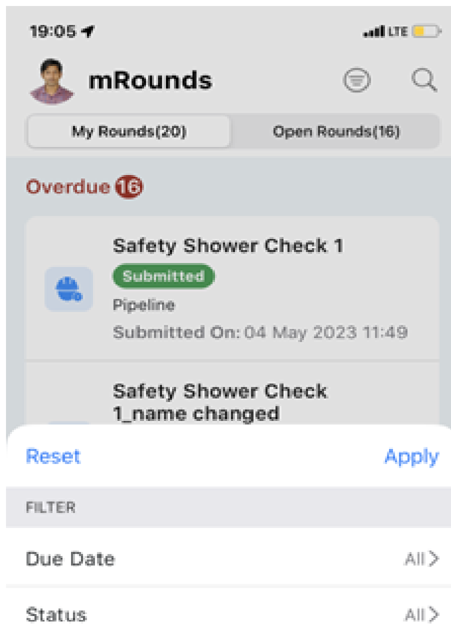
To filter rounds, issues, and actions:

1. Tap the Filter icon at the top right in the Rounds, Issues, or Actions screen.
2. Choose filters to narrow down the results. For example, Select Status = In Progress.
3. In the window, select the **Due Date** and **Status** values in case of My Rounds and **Due Date**, **Created By** & **Rounds (with or without User Group)** values in case of Open Rounds from the drop-down.
4. Tap **Apply** to refine your results.

   The filtered results are displayed.

   Tap **Reset** to clear the filter.

Figure 2-44 Filter My Rounds



2.11. Customize User Settings

The **User Profile** allows you to manage personal and account-related information, reset the application to change domains, manually re-sync data with cache clearing, and update key operational details such as plant, unit, position, and shift. Customizing profile ensures information is up-to-date and tailored to enhance user experience.

This chapter has the following topics:

2.11.1. View User Profile

The User Profile in mRounds allows you to manage personal and account-related information, reset the application to change domains, manually re-sync data with cache clearing, set preferences for notifications, and update important operational details like Plant, Unit, Position, and Shift. This module guides you through accessing and customizing your profile settings to enhance your experience and ensure your information is up to date for optimal performance.

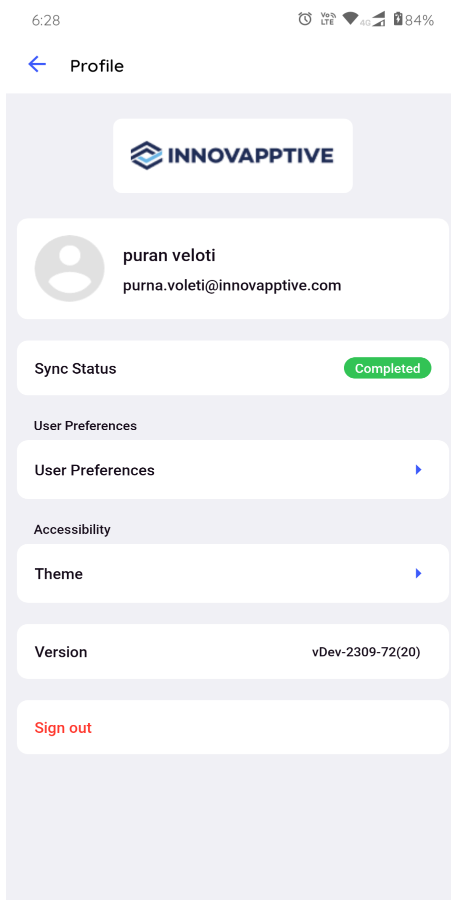
To access and view the User Profile screen:

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
    - Restart Initial Sync

- User Preferences
- Theme
- Version
- Sign Out

Figure 2-45 User Profile Screen



2.11.2. Update User Preferences

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.

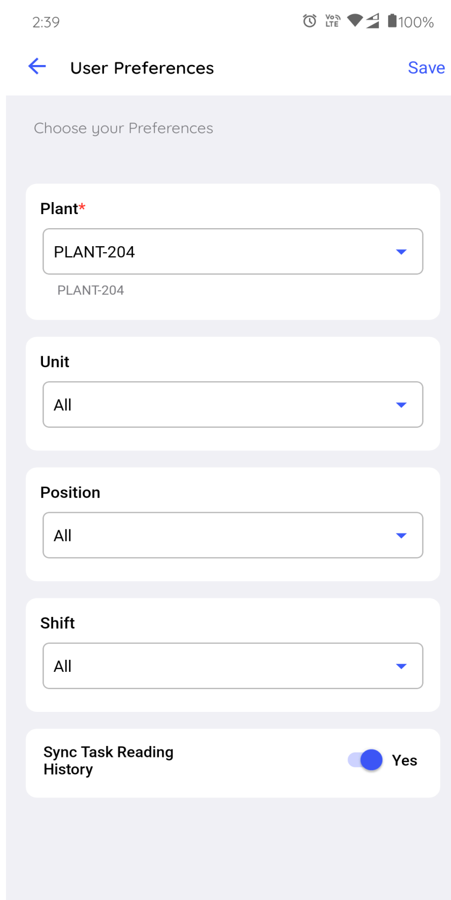
> **Note:**
> You can choose preferences for the Plant, Unit, Position, or Shift only when you are assigned to multiple plants, units, positions, or shifts. If you are assigned to one plant, unit, position, or shift, the option is grayed out and the Unit, Position, and Shift values are displayed based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

Figure 2-46 Select Plant



In the Data Filter screen, you can,

Figure 2-47 Data Filter

a. Access filter options for fields such as Rounds, Issues, Actions, Shift Handover Report, and Shift Logs.
b. Locate the dropd-own menu next to each field to modify the filters.
c. Tap the drop-down to view the available selection options.
    - Choose the preferred range (e.g., 1 Day, 1 Week, 2 Weeks, and 4 Weeks).
    - Repeat this process for each field that requires filtering.
d. Once all selections are made, tap the Save button in the top-right corner.
e. The app applies the chosen filter settings and automatically returns to the User Preferences screen.

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

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

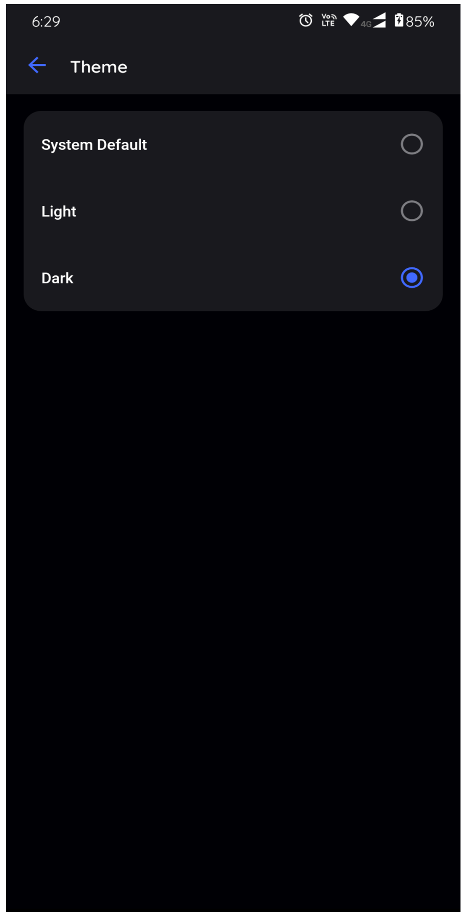
2.11.3. Switch Between Dark and Light Modes

You can switch between Dark or Light Mode to enhance visibility and reduce eye strain, especially in low-light conditions.

To change the mode or theme:

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

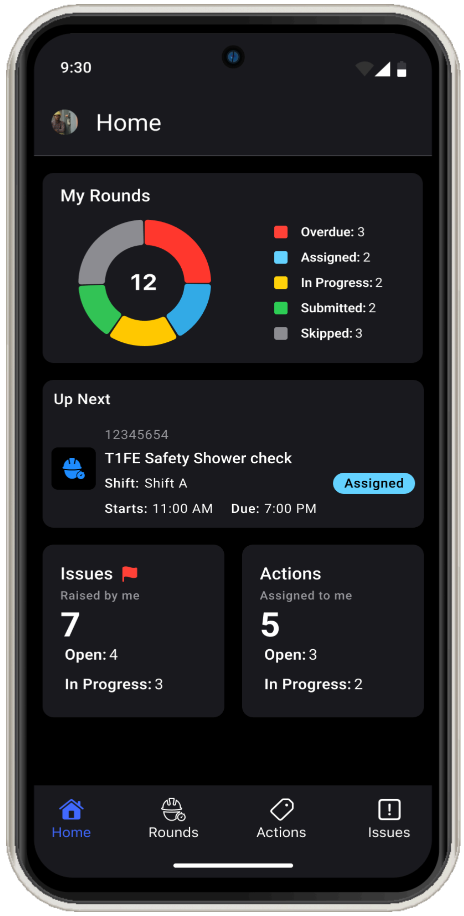
Figure 2-48 Select Theme



- **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 2-49 Dark Mode



2.11.4. Change the Language

You can change the language to view and access the application in your preferred language for better accessibility.

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.

3. Create and Monitor Rounds with mRounds Web App

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

This chapter has the following sections:

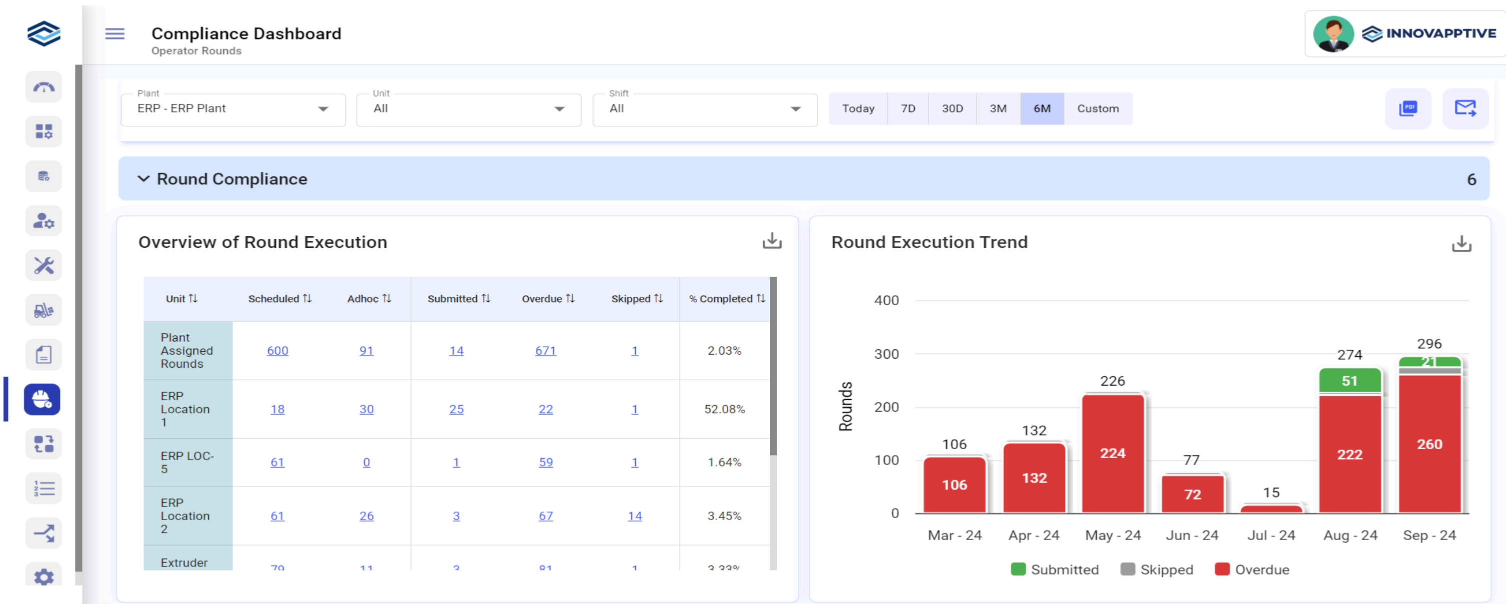
3.1. About the Web Application Screens

The mRounds web application consists of modules such as Round Plans dashboard for monitoring rounds, Reports for insights on task compliance and team performance, Scheduler for scheduling and assigning round plans, Observations for tracking issues and follow-ups, Archived for managing archived plans, Templates for creating round templates, and Shift Handover for generating shift reports.

Compliance Dashboard

The **Compliance Dashboard** summarizes an operator's findings from their rounds, verifying adherence to operational procedures, schedules, and tasks, while confirming no significant issues are encountered. For more details, see View Compliance Reports *(on page 134)*.

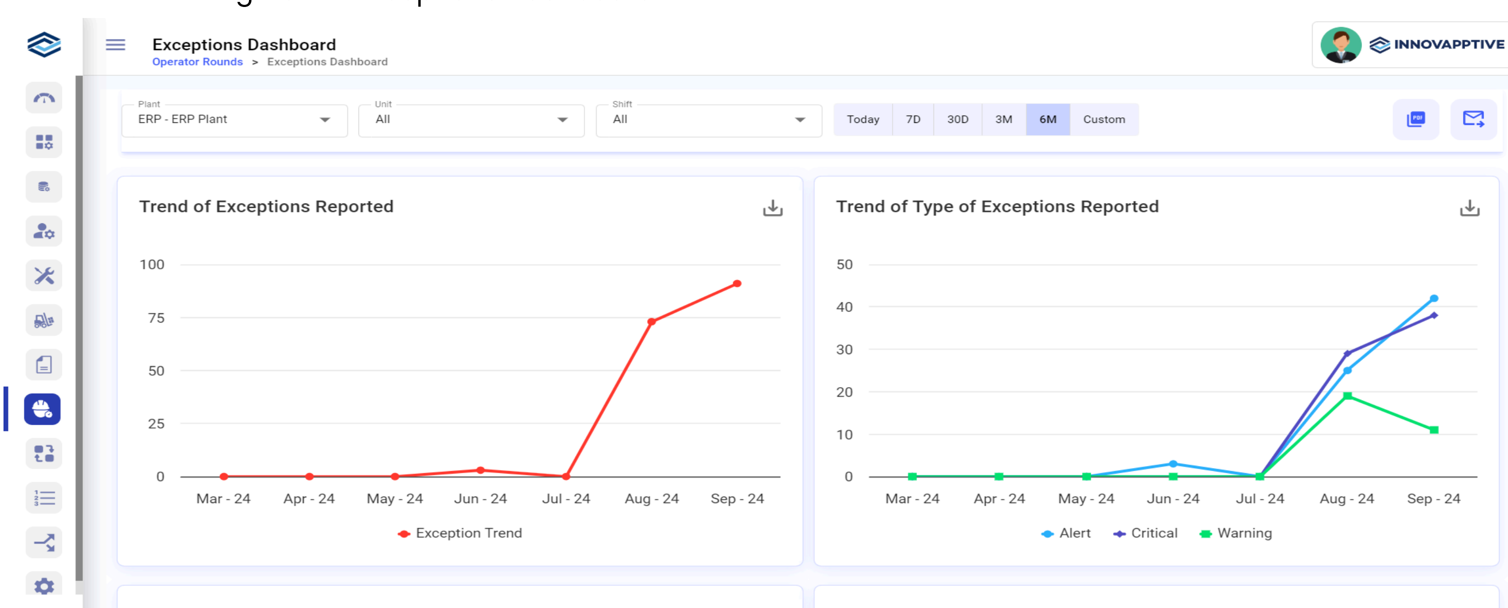
Figure 3-1 Compliance Dashboard



Exceptions Dashboard

The **Exceptions Dashboard** summarizes deviations from standard procedures or unexpected findings during rounds, highlighting anomalies like faulty equipment, safety hazards, or missing data. It helps identify and manage issues that could impact operational efficiency, safety, or compliance. For more details, see View Exceptions Reports *(on page 136)*.

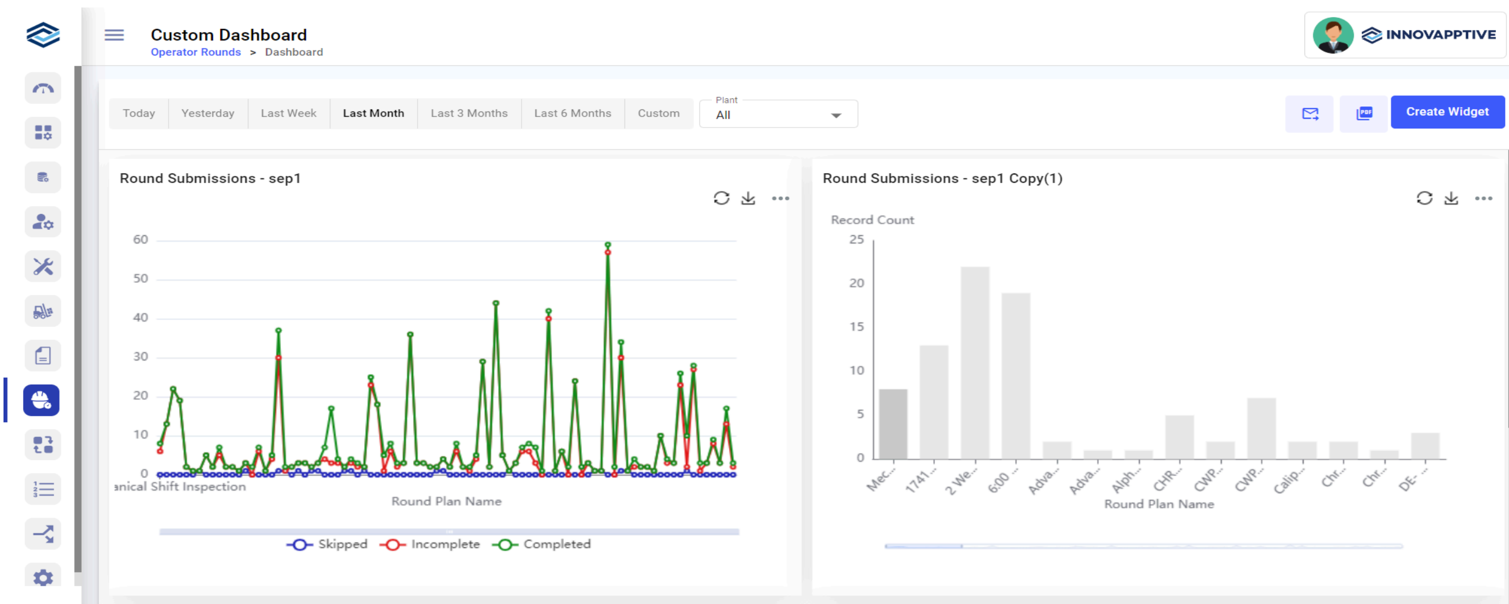
Figure 3-2 Exceptions Dashboard



Custom Dashboard

The **Custom Dashboard** gives an overview of rounds and asset health. You can tailor your experience by configuring widgets on the dashboard, optimizing your view for improved task monitoring and efficient data analysis. You can download or export widgets effortlessly in PDF and Excel formats or share them via email.

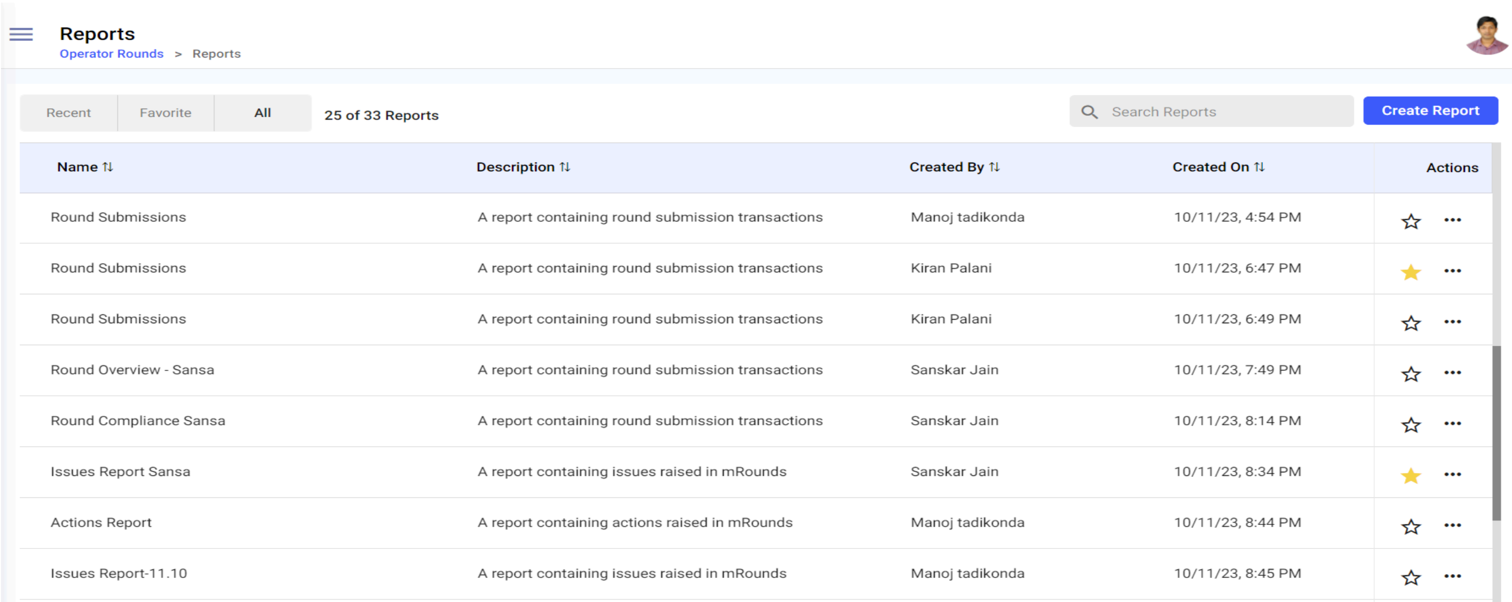
Figure 3-3 Custom Dashboard



Reports

Reports provide insights into task compliance, exceptions, and overall team performance, aiding in strategic improvements. You can effortlessly configure Task Compliance Reports, ensuring easy downloads for audit submissions. You can gain vital insights by querying comprehensive reports on exceptions, aiding you in monitoring tasks and asset health. Stay ahead with the Comprehensive Rounds Report, enabling supervisors to monitor, improve, and track team performance efficiently for enhanced operational control.

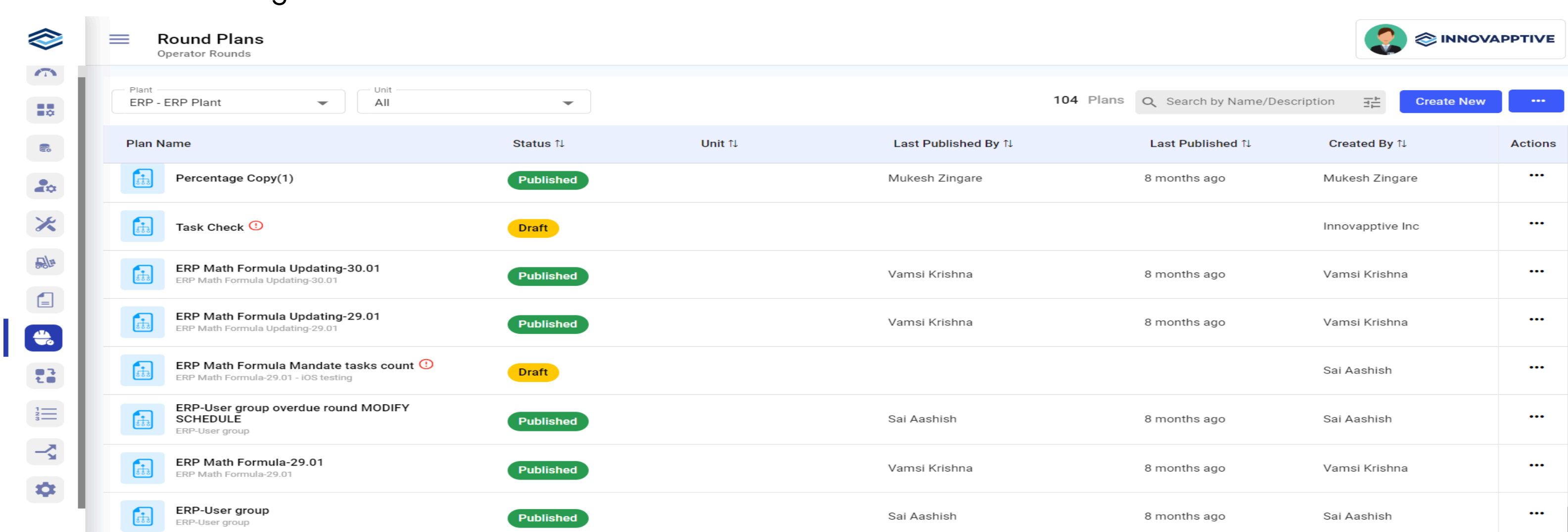
Figure 3-4 Reports



Round Plans

Round Plans screen lists the round plans that are in the **Draft** and **Published** statuses. Displays total number of plans on the top right. You can sort round plans by Status, Plant, Last Published By, Last Published, and Created By and filter by **Plant** and **Unit**. When you select a round plan, you can view the summary on the right side. You can also **Create**, **Search**, **Edit**, **Copy**, **Archive**, and **Export** round plans from this section.

Figure 3-5 Round Plans Screen

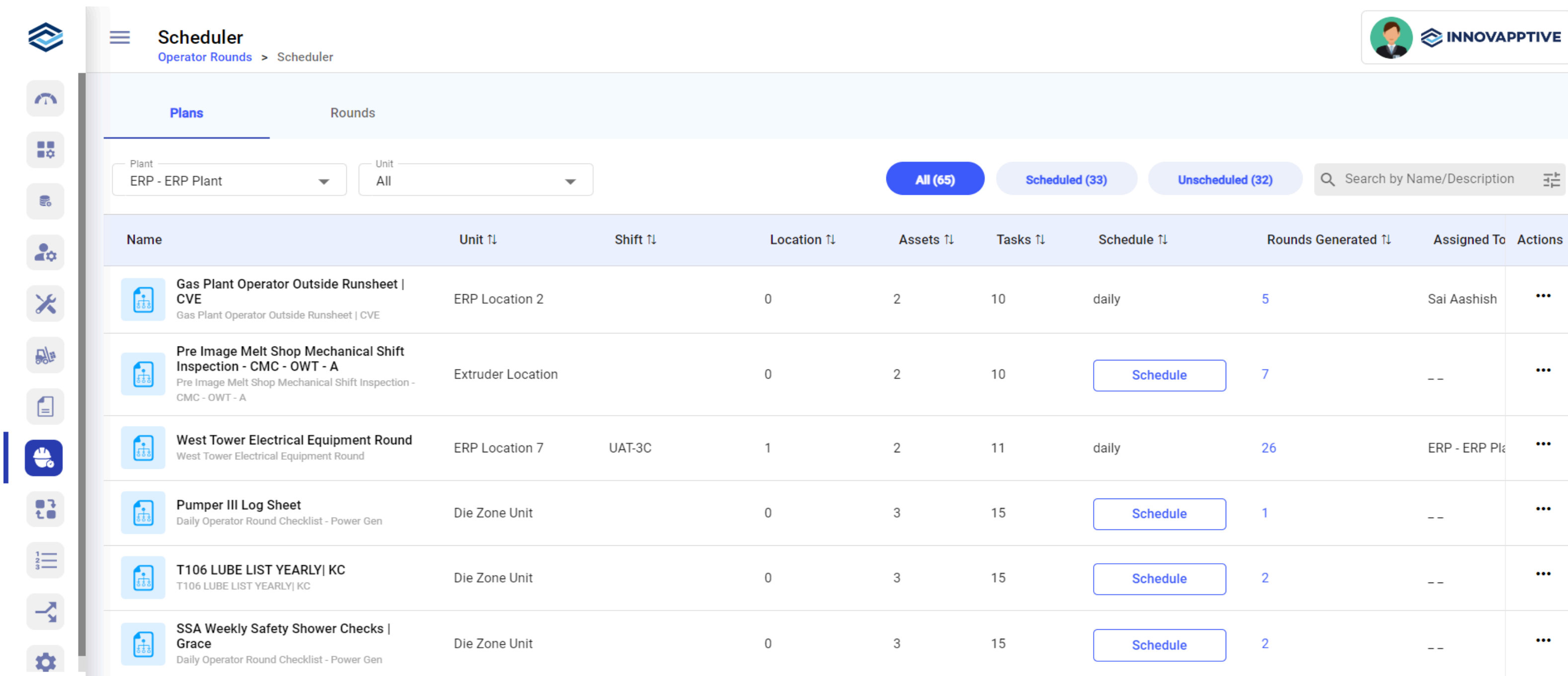


Scheduler

Scheduler helps Round Planners/Supervisors schedule and assign the published round plans to operators. This section consists of two tabs: Plans and Rounds.

- **Plans:** This tab lists all the published rounds that are either scheduled or unscheduled. You can filter plans by selecting **All**, **Scheduled**, or **Unscheduled** options at the top of the list. The scheduled round plans allow you to view schedule details, modify schedule, and view rounds. You can also search and filter published round plans by **Plant** and **Unit**.
- **Rounds:** This tab lists the scheduled rounds that are in Open, In-Progress, and Completed status. Rounds that are assigned to the operators and later unassigned are displayed with a partly open status. You can view rounds, round details, and plans. You can also search and filter scheduled rounds by **Plant** and **Unit**.

Figure 3-6 Scheduler Screen

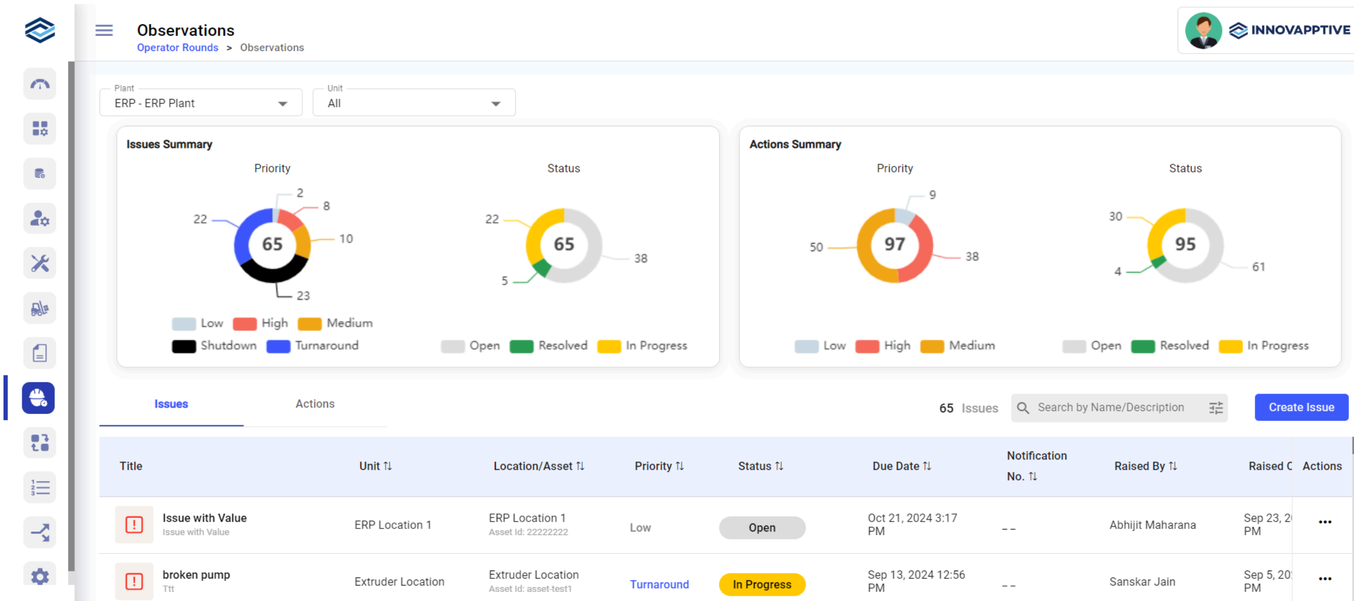


Observations

Observations help Round Planners/Supervisors to monitor the status of issues and follow ups for the issues. You can view Open Issues and Open Actions, categorized by priority and status in a graphical format and filter actions and issues by **Plant** and **Unit**. This section consists of two tabs: Issues and Actions.

- **Issues:** This tab lists all the issues reported by Operators while executing tasks. You can also search and filter issues.
- **Actions:** This tab lists all the follow-up actions raised by the Operators. You can also search and filter actions.

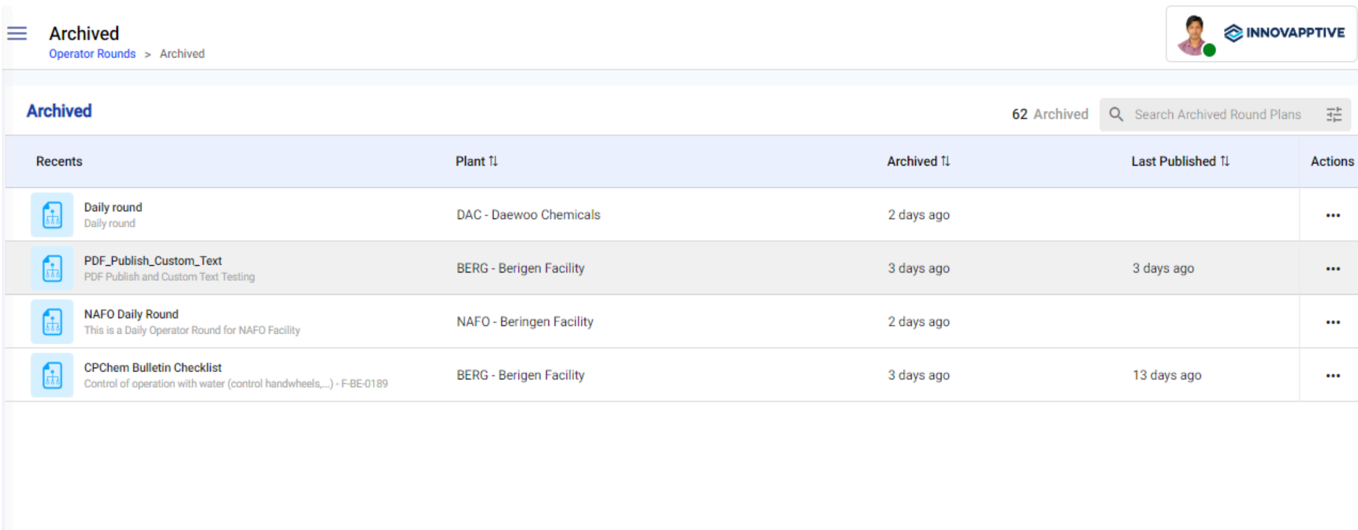
Figure 3-7 Observations Screen



Archived

Archived lists all archived rounds plans and round templates. It allows Round Planners/ Supervisors to restore or permanently delete the archived round plans or round templates. The list can be sorted by Plant, Archived, and Last Published. You can search archived round plans and filter plans by **Plant**, **Unit**, **Status**, **Modified By**, **Authored By**, and **Plant**.

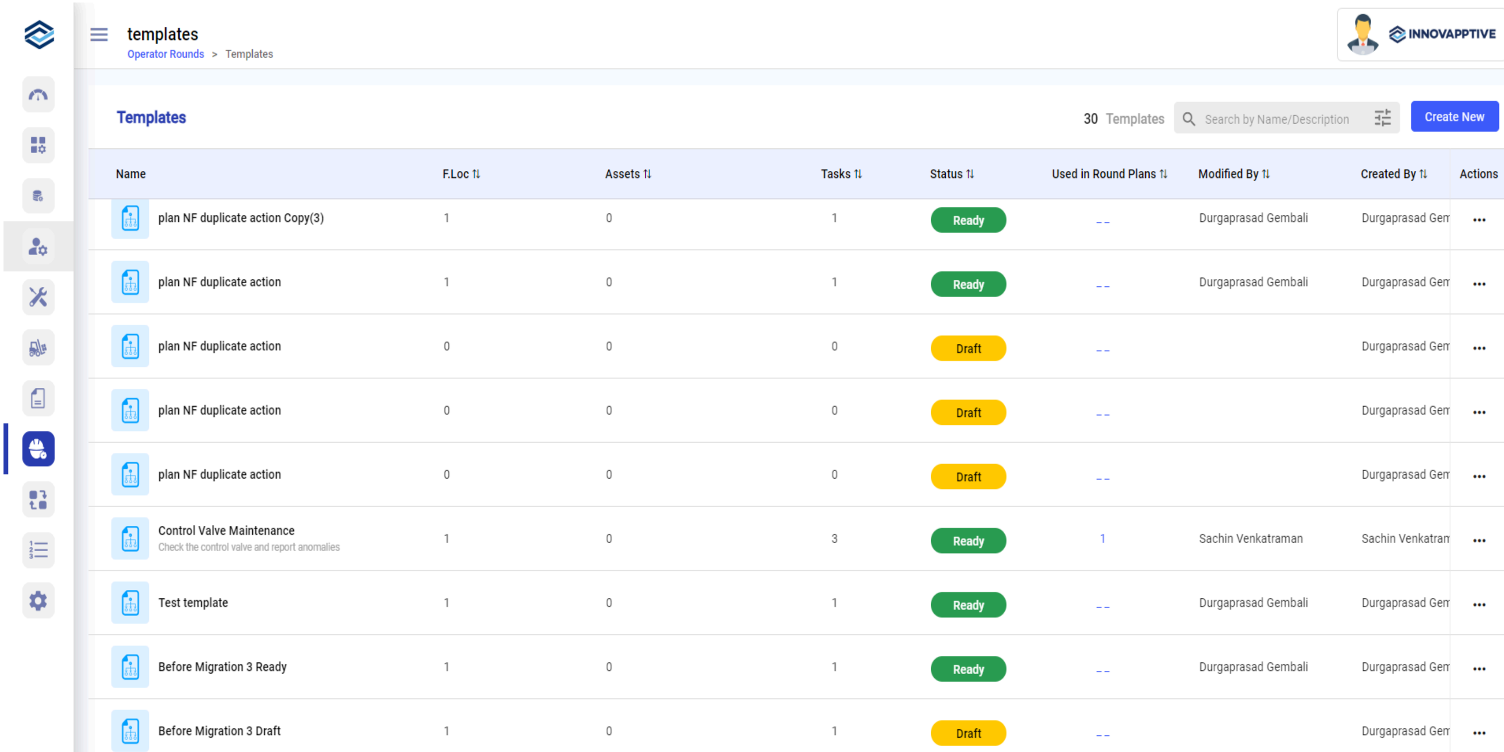
Figure 3-8 Archived Screen



Templates

Templates allows Supervisors/Round Planners to create a round template, which can be used to create round plans from pre-designed templates. It includes sections and tasks for asset identification, maintenance schedules, inspections. The Template section lists all the rounds in either Draft or Ready status. You can search round templates and filter them by **Plant** and **Unit**.

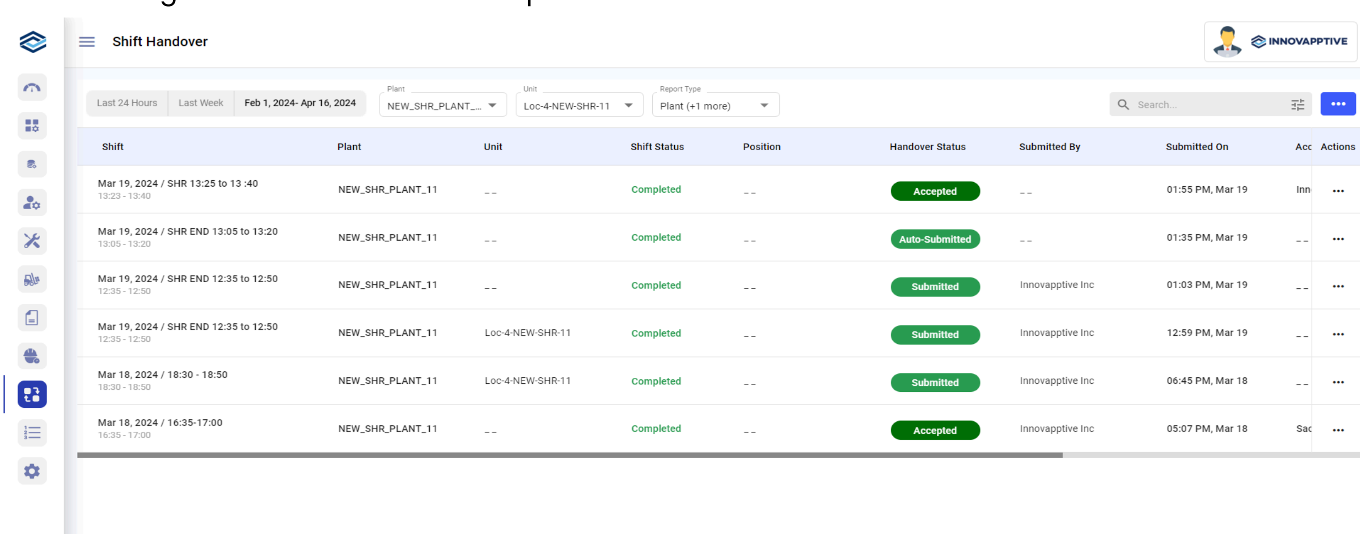
Figure 3-9 Templates Screen



Shift Handover

Shift Handover helps generate a comprehensive shift handover report with observations, logs, notes, and comments with ease. You can view the list of shift reports, search, and filter them by **Plants** and **Unit**.

Figure 3-10 Shift Handover Reports Screen



3.1.1. Log in to the Web Application

This section provides guidance on logging into the web application.

This section has the following topics:

- Standard Login *(on page 123)*
- Log in with SAP IDP *(on page 124)*

3.1.1.1. Standard Login

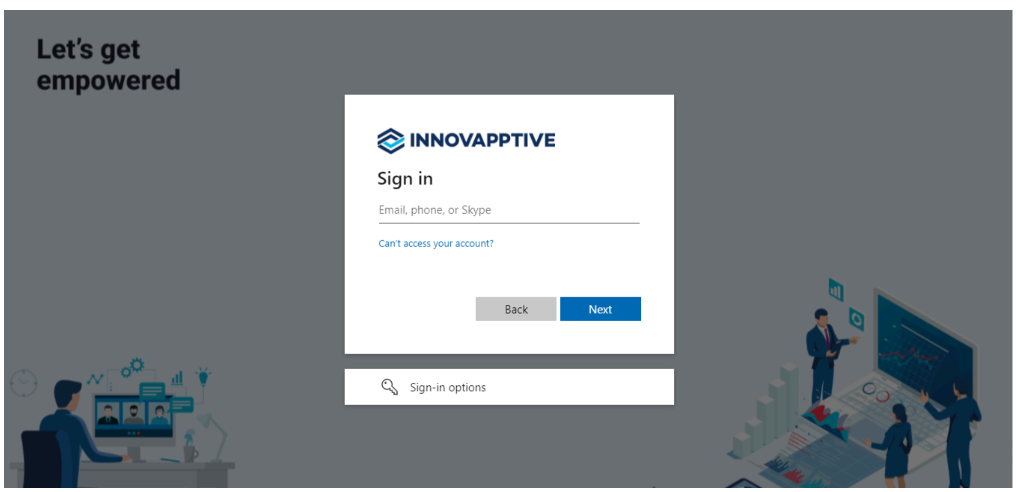
You can access the application through the URL and log in with your **User ID** and **Password**.

To log in to 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 3-11 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. Log in with SAP IDP

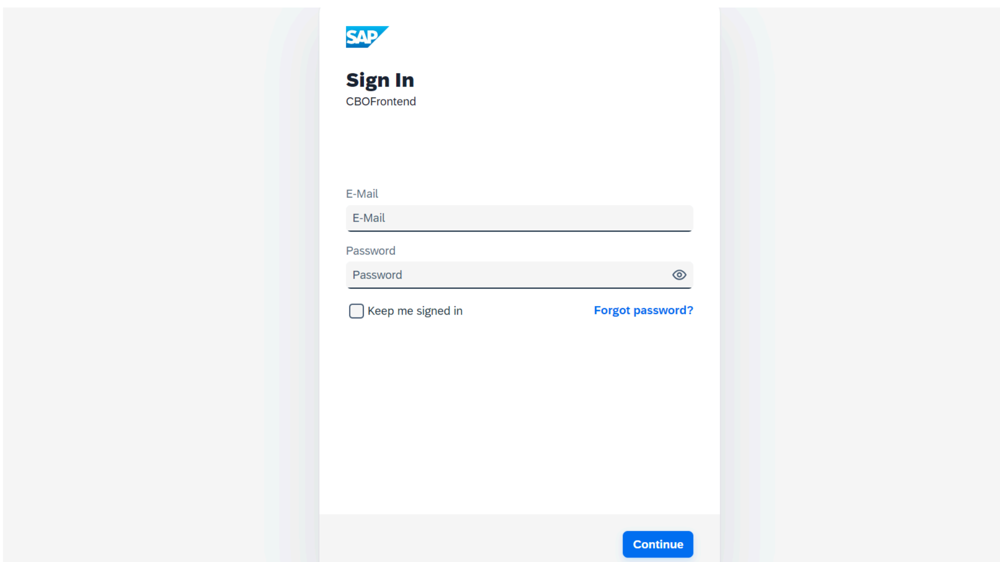
You can log into the web application using the SAP IDP.

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

To log in using SAP IDP:

1. Open the web application using the URL.

   Figure 3-12 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.

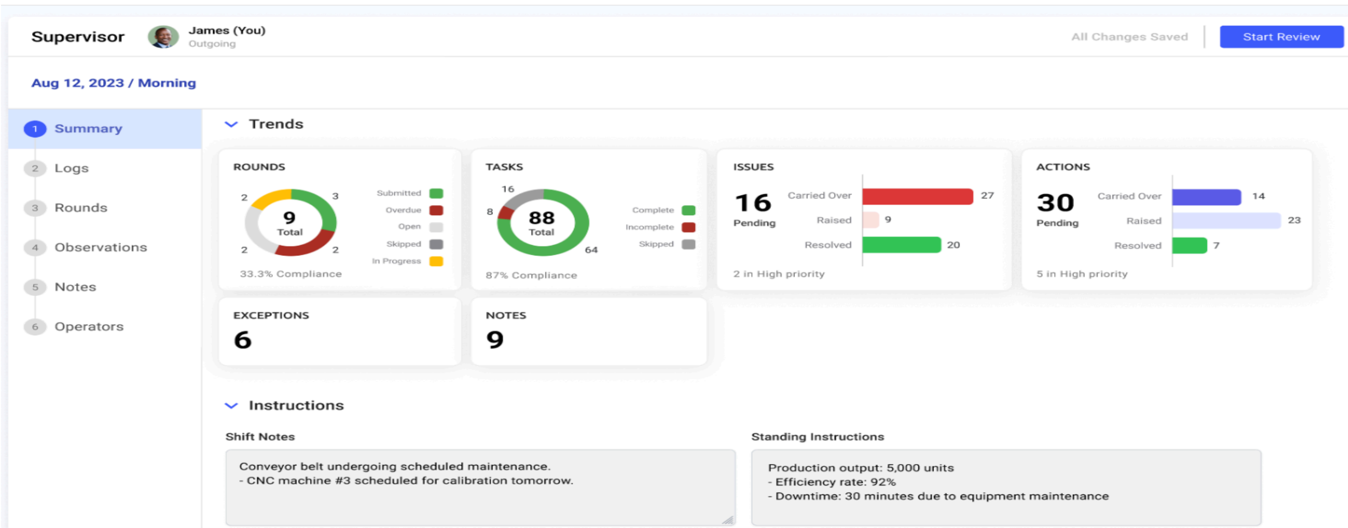
3.1.1.3. Review Accept Shift Handover Report

As the Incoming Supervisor, you must review and accept the shift handover report generated by the Outgoing Supervisor to take ownership of the outstanding tasks and issues, and review notes, observations, and attachments, facilitating effective communication and knowledge transfer during shift changes.

To review and accept the shift handover report:

1. Expand **Shift Handover** and click **Reports**.
2. Select a shift from the list which has the Handover Status as Submitted.
3. In the **Summary** tab,
    a. Click **Start Review** on top right.
    b. In the **Instructions** section, review **Shift Notes**, **Standing Instructions**, and **attachments**.
    c. Click **Next**.

Figure 3-13 SHR Review



4. In the **Logs** tab, review shift logs and click **Next** on top right.
5. In the **Rounds** tab, view the progress of rounds and click **Next**.
6. In the **Observations** tab, check unresolved exceptions, issues, and actions details and click **Next**.
7. In the **Notes** tab, review the notes added for the round during the shift and click **Next**.
8. In the **Operators** tab, view the operators along with the rounds submitted status and click **Accept** on top right.
9. In the **Confirm Acceptance** window, review the shift acceptance details and click **Accept**.

    A message “Accepted” is displayed. The Shift Status is changed to Completed, and the Handover Status is changed to Accepted in the Shift Handover screen.

3.1.2. Monitor in Real-Time and Share Reports

The Operator Rounds Dashboard provides users with a comprehensive overview of real-time and historical data related to operator rounds, including into rounds summary, compliance, exceptions, and issues & actions reports. This dashboard presents the data in an intuitive graphical format, enabling supervisors to easily monitor the progress and performance of rounds.

The dashboard helps visualize critical metrics such as completion rates, adherence to schedules, and any deviations or anomalies that occurred during the rounds. It consolidates information on exceptions and issues raised during rounds execution, alongside the actions taken to address them. By providing both real-time data and historical trends, the dashboard allows for proactive management and optimization of operator rounds, improving overall operational efficiency and compliance.

The information in the dashboard is categorized under,

- Custom Dashboard *(on page 126)*
- View Compliance Reports *(on page 134)*
- View Exceptions Reports *(on page 136)*
- Share the Data in Dashboard as PDF Reports *(on page 137)*
- Share a Round Plan *(on page 137)*

3.1.2.1. Custom Dashboard

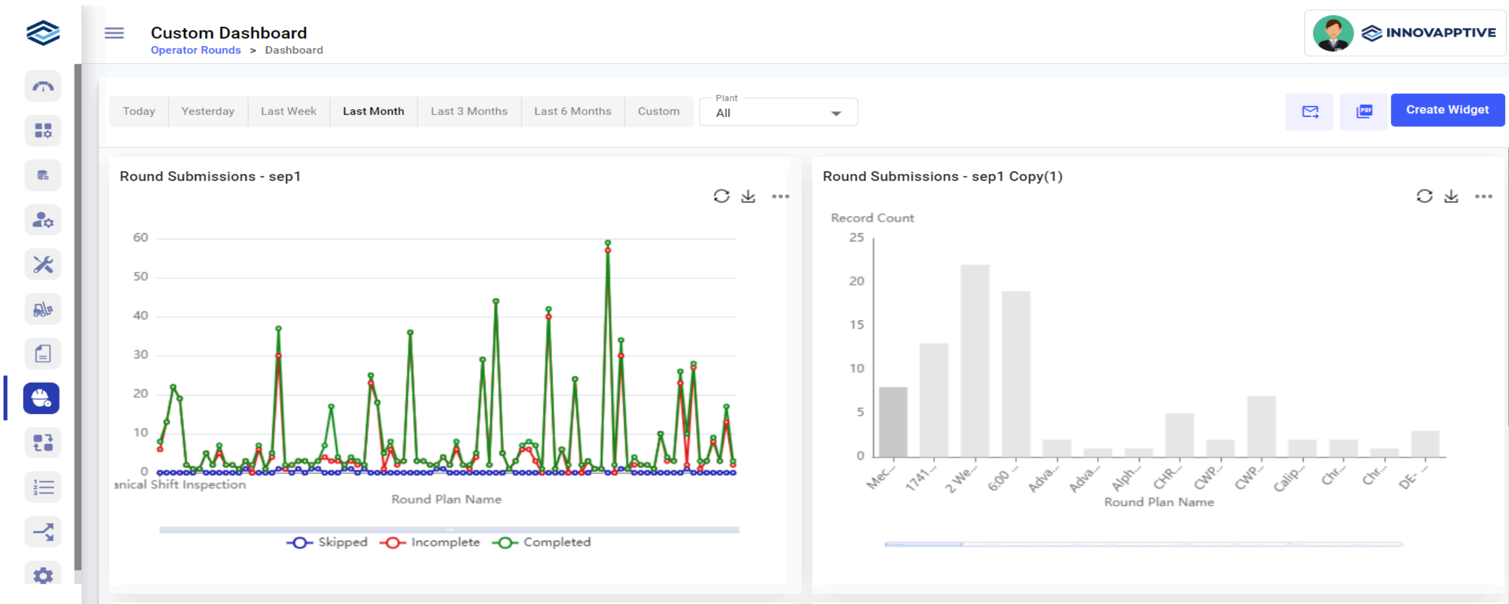
The **Custom Dashboard** provides a comprehensive overview of operator rounds and asset health, enabling real-time monitoring and analysis. Users can customize their experience by configuring widgets on the dashboard to display the most relevant data for their tasks. This flexibility allows for improved task monitoring and more efficient data analysis. Additionally, widgets can be easily downloaded or exported in PDF and Excel formats, or shared via email, streamlining collaboration and reporting. For more information, seeCreate Custom Widgets *(on page 127)*.

To view the Custom Dashboard:

Expand the **Operator Rounds** module and click **Custom Dashboard** on the left-side pane.

The Custom Dashboard screen is displayed with different types of widgets.

Figure 3-14 Custom Dashboard



In this screen, you can,

- Filter reports based on Today, Yesterday, Last Week, Last Month, Last 3 Months, Last 6 Months, Custom, Plant, or Shift.
- Click the Undo or Redo icons to undo or redo the actions that you have performed.
- Click **Create Widget** to create a widget. For more information, see Create Custom Widgets *(on page 127)*.

3.1.2.1.1. Create Custom Widgets

Widgets offer a dynamic way to visualize key data through charts, tables, and more. They help monitor task progress, track equipment status, and highlight critical issues in real-time, enabling better decision-making and proactive maintenance.

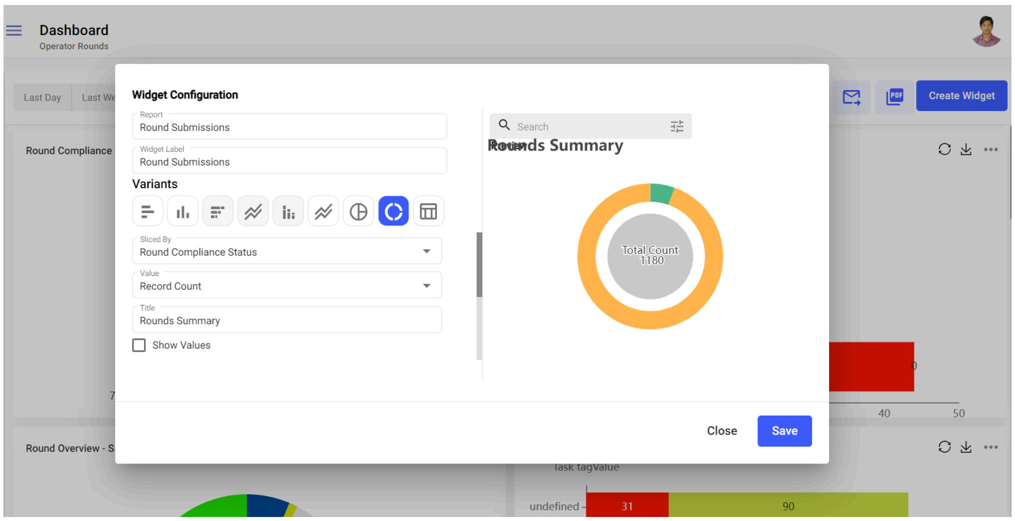
Learn how to create custom widgets that visually present essential reports and metrics. Using configurable data parameters, you can showcase various report types, such as task completion, compliance metrics, and equipment health. These widgets provide actionable insights for identifying trends, monitoring performance, and staying compliant with maintenance schedules.

For example, you can generate a widget that shows the percentage of completed maintenance tasks, allowing you to prioritize critical operations.

To create a widget:

1. Expand the **Operator Rounds** module and click **Custom Dashboard** on the left-side pane.
2. In the **Custom Dashboard** screen, click **Create Widget** on top-right.

Figure 3-15 Create Widget



3. In the **Widget Configuration** window,
   a. Select the report from the **Report** list.

> **Note:**
> To select the report, the report should be created earlier. For more information, see Create and Share Transactions and Rounds Reports *(on page 130)*.

   b. Enter the report name in the **Widget Label** field. Form example, such as Maintenance Rounds Monitoring.
   c. Select the variants like Column Chart, Bar Chart, Horizontal Stacked Chart, Multiline Chart, Vertical Stacked Chart, Area Chart, Pie Chart, Donut Chart, or Tabular from the **Variants** section.
   d. Select the Group by Fields and Columns, **X axis** and **Y axis**, **Stack By**, or **Sliced By** and **Value** values.

> **Note:**
> The above values appear based on the selected variant.

e. Select color for the legends.
f. Enter the title of the widget in the **Title** field.
g. Select the **Show Values** checkbox to display the values for the transactions.
h. Select the **Show Legends** checkbox to display the legend.
i. **Note:**
If you want to show the particular transaction from the report in the widget (for example, transactions done by operators), perform the below steps:
    i. Click the Filter icon on the right side.
    ii. In the **Filter** pop up, select the column value in the **Add Filter** field (for e.g., Role).
    iii. Click the column value (for e.g., Role).
    iv. In the **Filter by** pop up, select the filter value (for e.g., Operator).
    v. Click **Save**.
    vi. Click **Apply**.
    vii. Now the widget displays the values for the selected transaction.
    viii. Click the **Reset** button to clear the filter and display all the values.
j. Click **Save**.

The Widget is created successfully.

In the Dashboard screen, you can,
- Filter reports based on Last Day, Last Week, Last Month, Last 3 Months, Last 6 Months, or Custom.
- Filter reports based on Plant or Shift.
- Click the Restore icon to refresh the data in the widget.
- Click the Save as Image icon to save the widget as an image.
- Click the More icon and select **Edit** to edit the widget.
- Click the More icon and select **Copy** to copy the widget.
- Click the More icon and select **Delete** to delete the widget.

  - Resize the widgets.
  - Drag and drop widgets and change location.
  - Click on the widget to see and download or export the detailed report in Excel format.
  - Select the legend value in the widget to hide it from the widget (works only for Pie and Doughnut variants).

3.1.2.1.2. Create and Share Transactions and Rounds Reports

Learn how to configure custom data parameters for generating insightful reports. Supervisors can track key metrics like task completion rates, equipment performance, and issues raised during maintenance rounds. These reports can be displayed in widgets for easy monitoring.

There are two types of reports you can generate:

- **Transactions Reports**: These provide insights into transactional data and module activities.
- **Rounds Reports**: These cover details like **tasks**, **actions**, **issues**, **shift compliance**, **scan overrides**, **operator round compliance**, and **exceptions**.

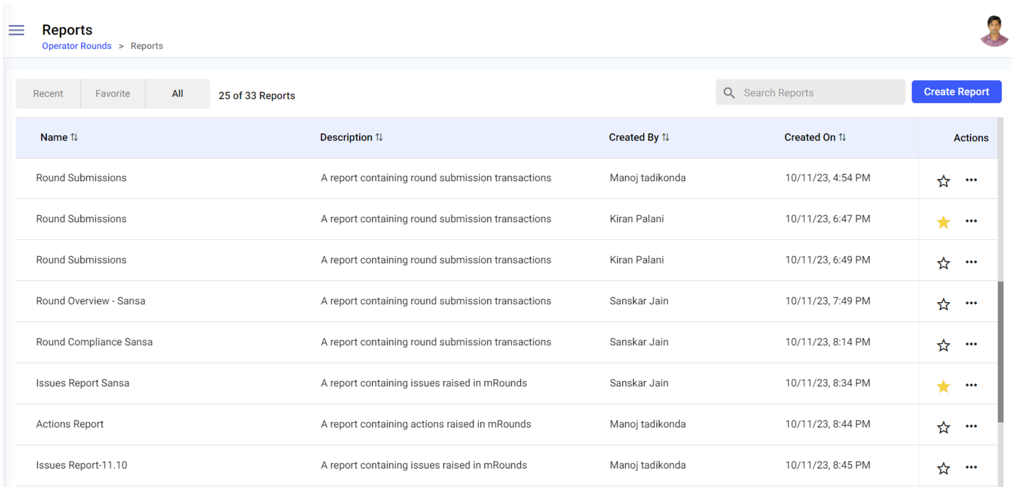
By selecting the right report type and filtering data by plant, asset, or round status, you can quickly find and share useful information.

To create a report:

1. Expand the **Operator Rounds** module and click **Reports** on the left-side pane.

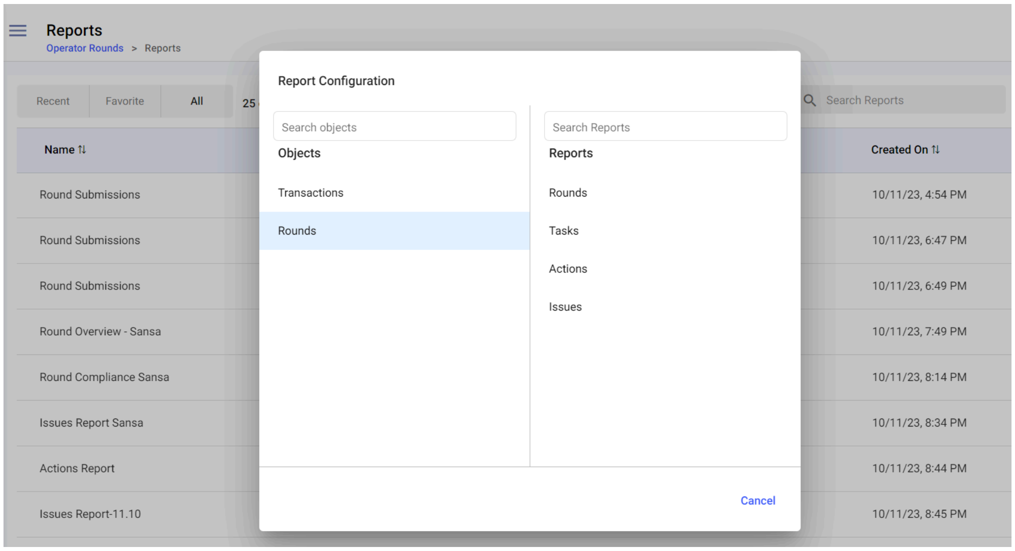
   The Reports screen with list or existing reports is displayed.

   Figure 3-16 Reports Screen

   In this screen, you can,
   - Filter and view the reports based on Recent, Favorite, and All options.
   - Search the reports using the **Search Reports** bar.
   - Click the Sort icon next to the columns to sort the columns.
   - Click the Favorite icon to mark the report favorite.
   - Click the More icon > **Preview** option to view the preview of the report.
   - Click the More icon > **Edit** option to edit the report.
   - Click the More icon > **Export to Excel** option to download or export the report in excel format.
   - Click the More icon > **Copy** option to copy the report.
   - Click the More icon > **Delete** option to delete the report.
2. In the **Reports** screen, click the **Create Report** button on the right-side.
3. In the **Report Configuration** window,

Figure 3-17 Report Configuration Window

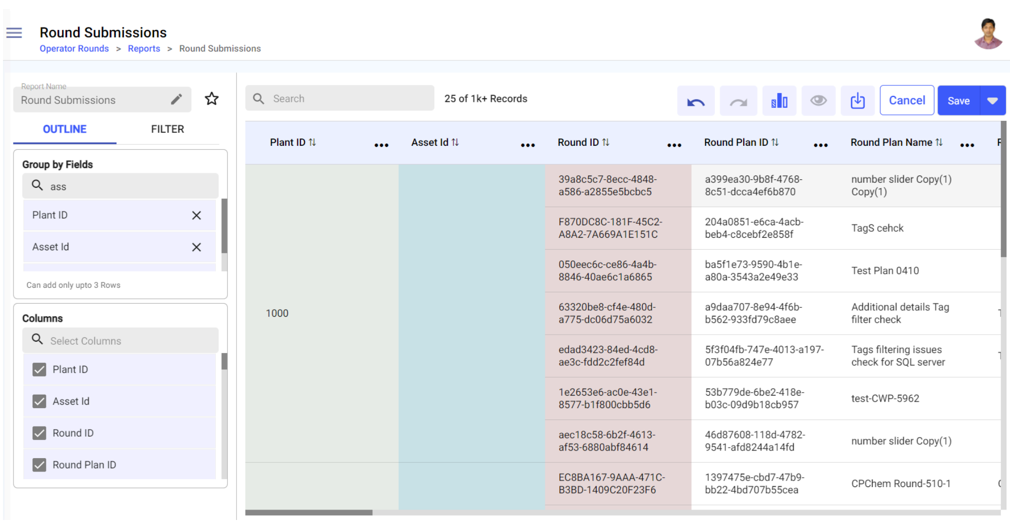


a. Select the **Objects** such as **Transactions** or **Rounds** on the left side.

b. Select the **Reports** such as Rounds, Tasks, Actions, or Issues on the right side.

The Create Report screen is displayed.

Figure 3-18 Create Report



4. In the **Report Name** field, click the Edit icon to update the title of the report, if needed.
5. In the **Group by Fields** field, select the value or column to group the data by the selected value or column in the report. For example, Plant ID.
6. In the **Columns** field, select the required columns to display them in the report.
7. Click **Save** or **Save As** on the top right to save the report with a different name.

   The report is saved successfully and you can see it in the Reports screen.

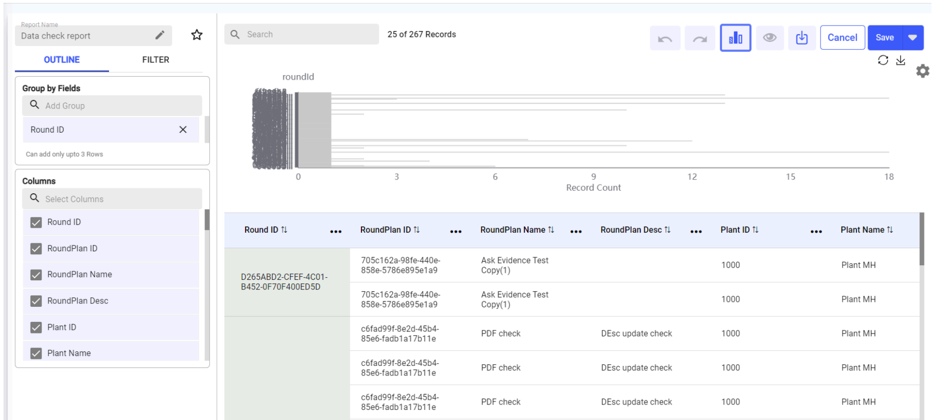
In the Create Report screen, you can,

- Click the Favorite icon next to the **Report Name** field to mark the report favorite.
- Search the columns using the **Search** bar.
- Filter or query the report based on Date, Plant, Unit, Shift, Asset or Location, Round Details, etc. Follow the below steps to filter.
    - Click the **Filter** tab on the left-side section.
    - Click **Add Filter** and select the value from the list. For example, RoundPlan ID, Plant Name, Shift Name, Slot Time, Location Name, Asset ID, or Task ID, etc.
    - Click on the selected value.
    - In the **Filter by <value>** pop-up, select a value from the Operator drop-down such as equals, not equal to, less than, greater than, less or equal, greater or equal, contains, does not contain, or starts with, enter a value and click **Save**.
    - The filtered or queried report is displayed on the right-side and you can download it.

> **Note:**
> Filter doesn't apply to the bar chart.

- Click the Undo or Redo icons to undo or redo the actions that you have performed.
- Click the Bar Graph icon to view the data in the widget format.
    - Click the Settings icon to change the variants or styles of the widget and the values. For more information, see Create Custom Widgets *(on page 127)*.
    - Click the **Restore** icon to refresh the data in the widget.
    - Click the Save as Image icon to save the widget as image.

Figure 3-19 Bar-chart Details



- Click the Preview icon to view the preview of the report.
- Click the Download icon to download or export the report into csv or excel format.
- Click the Sort icon to sort the columns in the table.
- Click the More icon > **Hide Column**, **Move Left**, **Move Right**, **Stick**, to **Group Rows by this Column** next to the columns to hide, move left, move right, stick, and group the columns.

3.1.2.2. View Compliance Reports

The **Compliance Dashboard** tracks adherence to company policies, regulatory requirements, and standard operating procedures. It provides insights into completed vs. overdue inspections, safety checks, and audit compliance, ensuring that teams meet required standards..

Supervisors can use this dashboard to monitor compliance trends, identify gaps, and take proactive measures to mitigate risks. By centralizing compliance data, this dashboard helps organizations maintain accountability and avoid potential penalties or safety hazards.

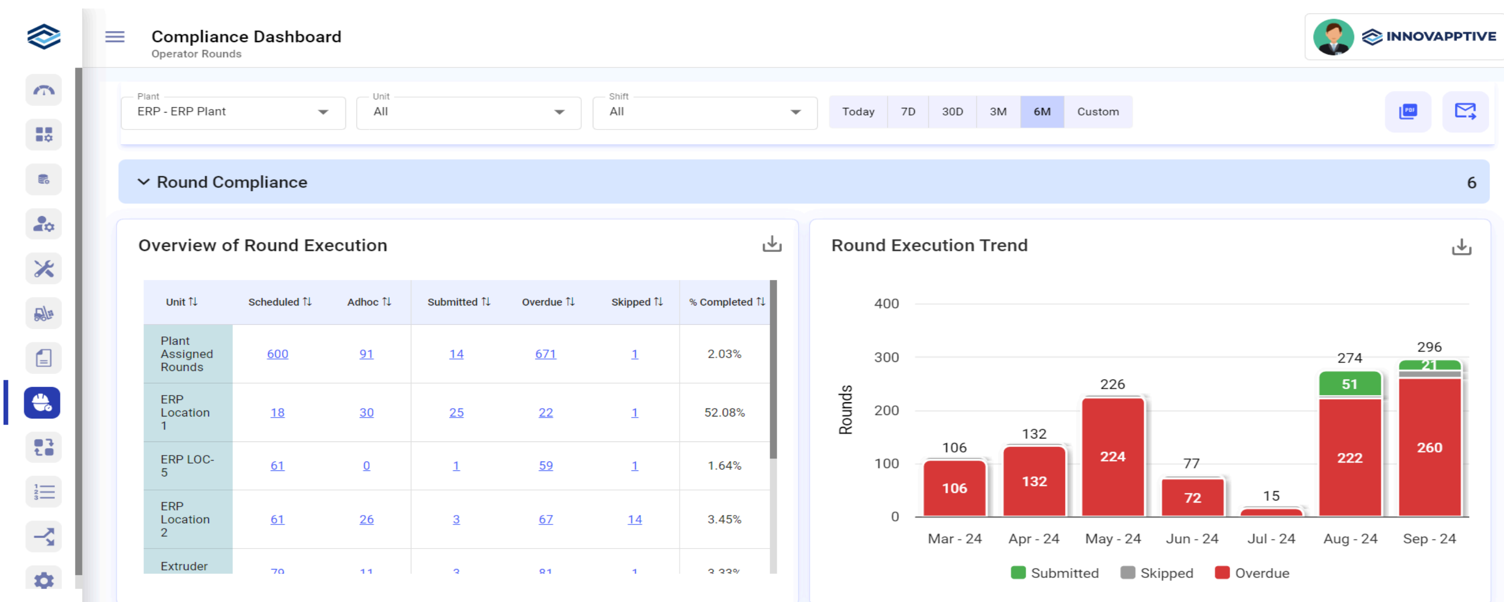
To view compliance reports:

Expand the **Operator Rounds** module and click **Compliance Dashboard** on the left-side pane.

The information in the Compliance Dashboard is categorized under the following sections.

- **Round Compliance**: This section visually represents the percentage of completed versus incomplete rounds, based on the status of each round. It helps supervisors quickly assess adherence to scheduled rounds and identify any missed or incomplete tasks.
- **Scan Compliance**: This section summarizes any scan overrides that occurred during operator rounds. It highlights instances where operators manually bypassed scanning requirements, providing insight into deviations from standard procedures.
- **Time Compliance**: This section displays the expected versus actual duration of rounds, providing a summary that highlights any discrepancies. It helps ensure rounds are completed within the designated timeframes for optimal efficiency.
- **Issues / Actions Compliance**: This section displays the number of issues and actions raised during rounds execution, comparing those created versus those resolved. It helps monitor the resolution process, ensuring timely action and compliance with operational standards.

Figure 3-20 Compliance Dashboard



In this screen you can,

- Filter the reports based on Plant, Unit, Shift, Today, 7 Days, 30 Days, 3 Months, 6 Months, and Custom.
- Click the PDF icon on top-right to download the Compliance Dashboard in PDF format.
- Click the Email icon on the top-right corner to share the dashboard through email.
- Click the Download icon on the report widget to save the report in image format.
- Click the values on the graph to view them in detail and download.

3.1.2.3. View Exceptions Reports

The **Exceptions Dashboard** helps users quickly identify and address issues that deviate from expected workflows or performance standards. It highlights critical exceptions, such as overdue work orders, missed deadlines, pending approvals, or equipment failures, ensuring that potential problems are addressed before they escalate.

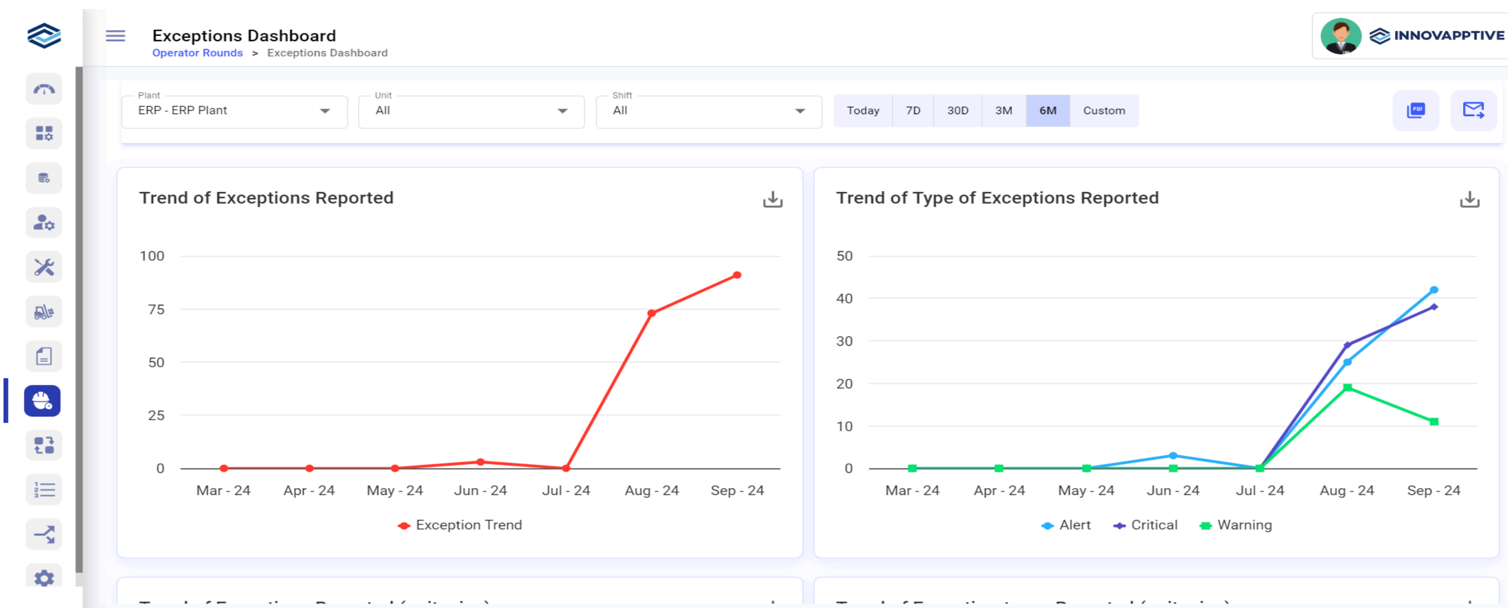
By providing a real-time view of anomalies, this dashboard enables supervisors to take corrective action, reassign tasks, or allocate resources more effectively, minimizing operational disruptions.

To view the Exceptions Dashboard:

Expand the **Operator Rounds** module and click **Exceptions Dashboard** on the left-side pane.

The Exceptions Dashboard screen is displayed with different types of widgets.

Figure 3-21 Exceptions Dashboard



In this screen you can,

- Filter the reports based on Plant, Unit, Shift, Today, 7 Days, 30 Days, 3 Months, 6 Months, and Custom.
- Click the PDF icon on top-right to download the Exceptions Dashboard in PDF format.
- Click the Email icon on the top-right corner to share the dashboard through email.
- Click the Download icon on the report widget to save the report in image format.
- Click the values on the graph to view them in detail and download.

3.1.2.4. Share the Data in Dashboard as PDF Reports

You can download the custom, compliance, and exceptions dashboards along with the widget reports data in the PDF format and share the data with stakeholders.

To download and share the reports:

1. Navigate to **Operator Rounds** > **Compliance Dashboard** / **Exceptions Dashboard** / **Custom Dashboard**.
2. Click the PDF  icon to download the report in the PDF format.
3. Click the Email  icon, enter the mail id, and click **Send Email** to share the report through mail.

   > **Note:**
   > You can select Configure Email Schedule to configure the email scheduling details.

4. Click the **Download** icon on the report widget to download the individual report in the image format.

3.1.2.5. Share a Round Plan

The Share a Round Plan feature allows users to download and share reports on **Submitted**, **Overdue**, or **In-Progress** rounds.

This helps teams track progress, identify delays, and ensure that all assigned rounds are completed on time. By exporting this data, users can share insights with relevant stakeholders, improving transparency and decision-making.

To download and share a Round Plan:

1. Expand the **Operator Rounds** module and click **Scheduler**.
2. Click the **Rounds** tab.
3. Click the **More** icon and select **Show Details** for the submitted, overdue, or in-progress round.
4. Click **View PDF** to view the details in PDF.
5. Click **Download** to download the round plan details in PDF format.

3.2. Create, Review and Schedule a Round Plan

The **Create a Round Plan** feature in mRounds allows supervisors to set up detailed maintenance checklists for inspections, known as round plans, that operators use during their rounds.

Supervisor creates round plans with multiple tasks for asset maintenance checks and publishes them. The published round plans are assigned to operators depending on their availability.

Operators access the round plans through the mRounds app, fill in the round details, and submit.

For example, in a chemical plant, you create a **Control Valve Maintenance Round Plan** to inspect valves, record readings, and report issues, ensuring equipment remains safe and operational.

A round plan has the following status:

- **Draft**: The round plan is created and saved. You can save round plans and edit them unlimited times until you publish them.
- **Published**: The round plan is created and published and it is ready to be scheduled.

This chapter has the following topics:

3.2.1. Understanding Response Types Used for Creating Round Tasks

A well-thought-out and structured round plan gives context for your operators and helps them to complete their work quickly, correctly, and efficiently.

Design your round plan task comprehensively to:

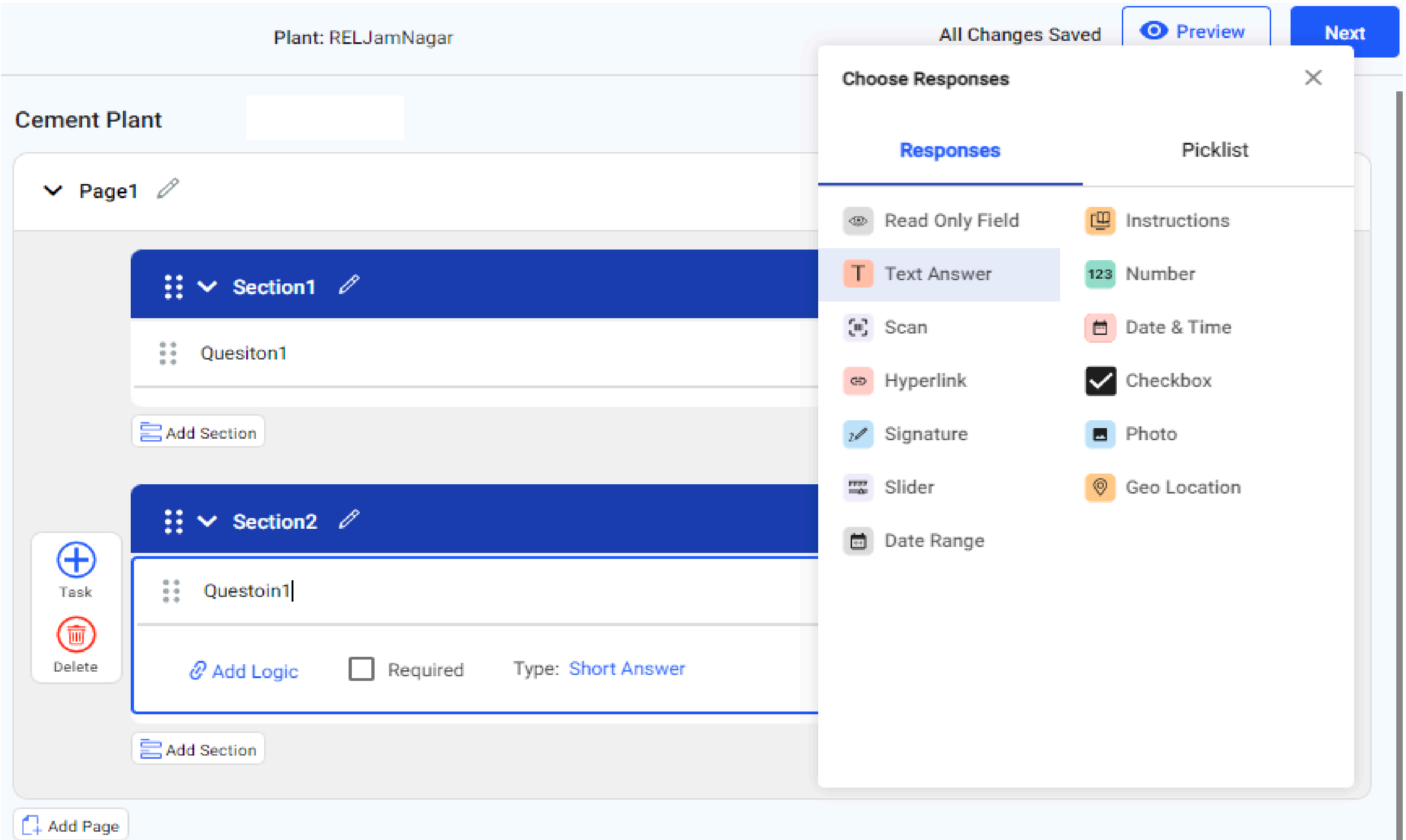
- Capture all the required information about the assets.
- Make it simpler to do maintenance checks in an orderly manner.
- Enhance the field user experience.

Follow the below pointers to create an effective round plan:

Pages and Sections

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

Structure round plans 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 tasks together.

- **Tasks**

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

- **Standard Response Types**

  Standard response types are predefined formats that help capture relevant data consistently and efficiently during maintenance tasks. Standard Response Types are categorized into **Responses** and **Picklist**.

  The application supports the following Standard Response Types:

- ◦ Read Only Field *(on page 151)*
- ◦ Text Answer *(on page 144)*
- ◦ Scan *(on page 141)*
- ◦ Hyperlink *(on page 152)*
- ◦ Signature *(on page 162)*
- ◦ Slider *(on page 153)*
- ◦ Date Range *(on page 154)*
- ◦ Instructions *(on page 143)*
- ◦ Number *(on page 145)*
  - ▪ Number with the Unit of Measurement *(on page 146)*
  - ▪ Number Range and Exceptions *(on page 147)*
  - ▪ Popup Message based on Number Range *(on page)*
- ◦ Date and Time *(on page 155)*
- ◦ Checkbox *(on page 156)*
- ◦ Attachment *(on page 156)*
- ◦ Geo Location *(on page 142)*
- ◦ Multiple Choice *(on page 157)*
- ◦ Global Picklist *(on page 159)*
- ◦ Conditional Logic *(on page 163)*.

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. 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 3-22 Geo Location Response Type

3.2.1.3. 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."

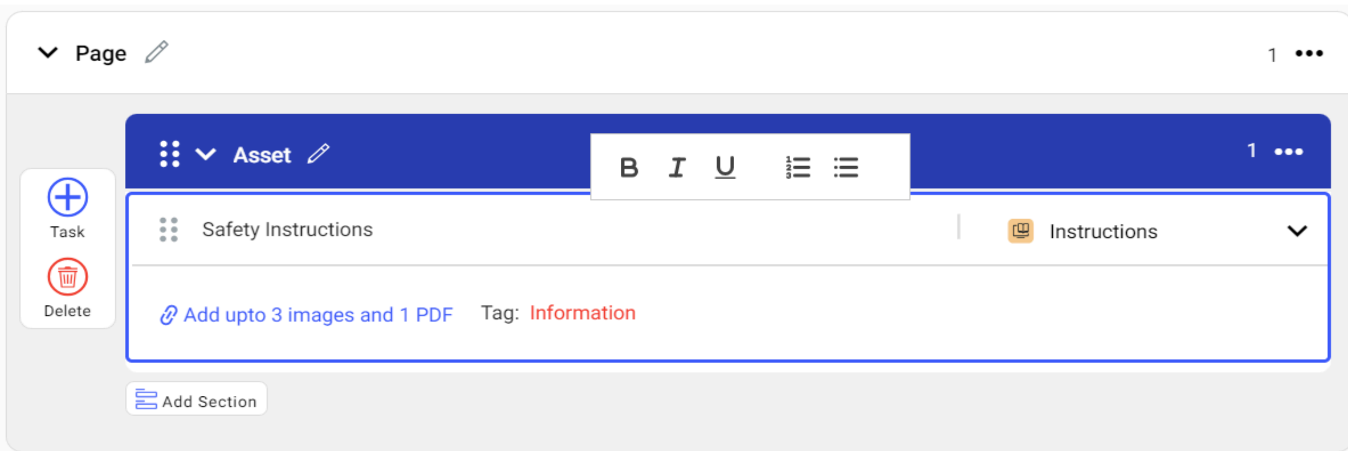
To add instructions response type:

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 3-23 Instructions Response Type



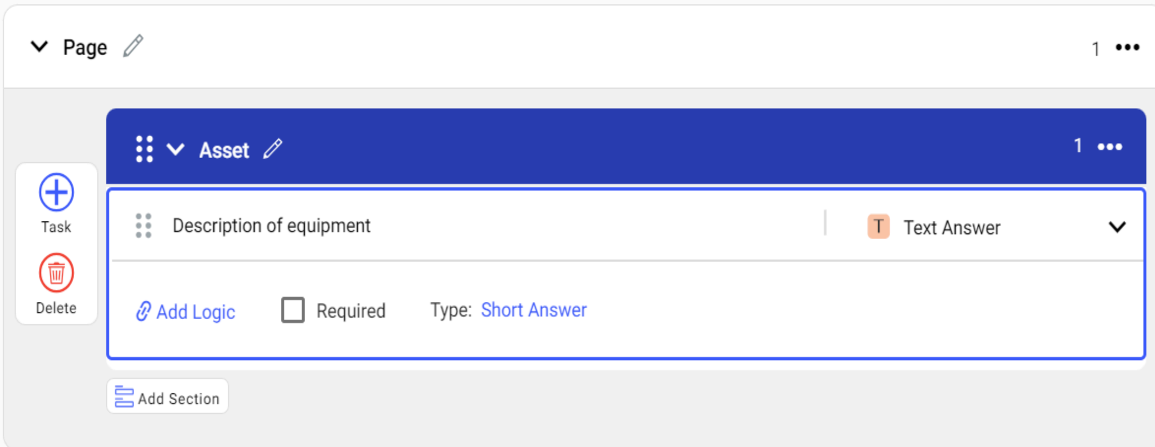
3.2.1.4. Text Answer

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 163)*.
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. 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.

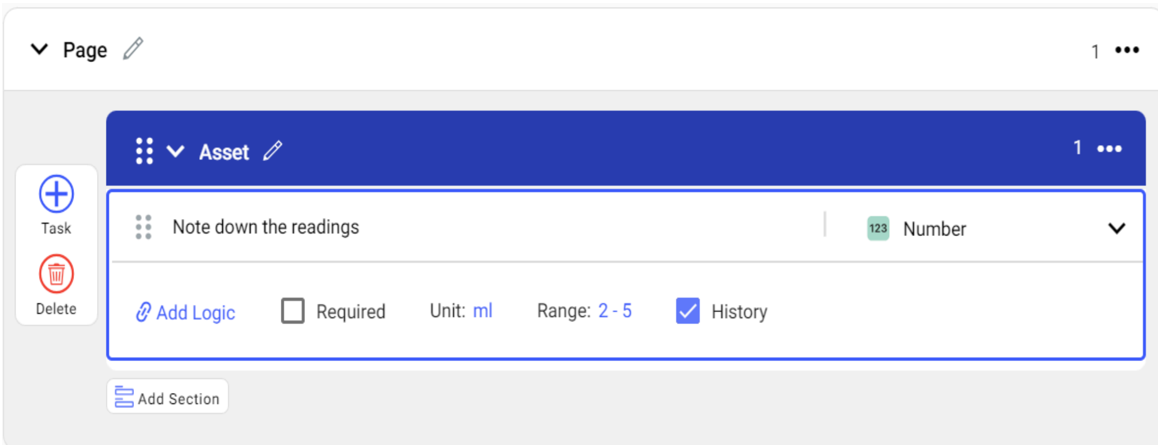
For example, the operator or technician enters the pressure reading: **120 PSI**.

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 163)*.
4. Select the **Required** check box if the value is required.
5. Select the relevant **Unit** like meter (m), centimeter (cm), liter (l), Celsius (^{o}C), and so on. For more information, see Number with the Unit of Measurement *(on page 146)*.

6. Select the **Range** for the selected Unit. For more information, see Number Range and Exceptions *(on page 147)*.
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**.

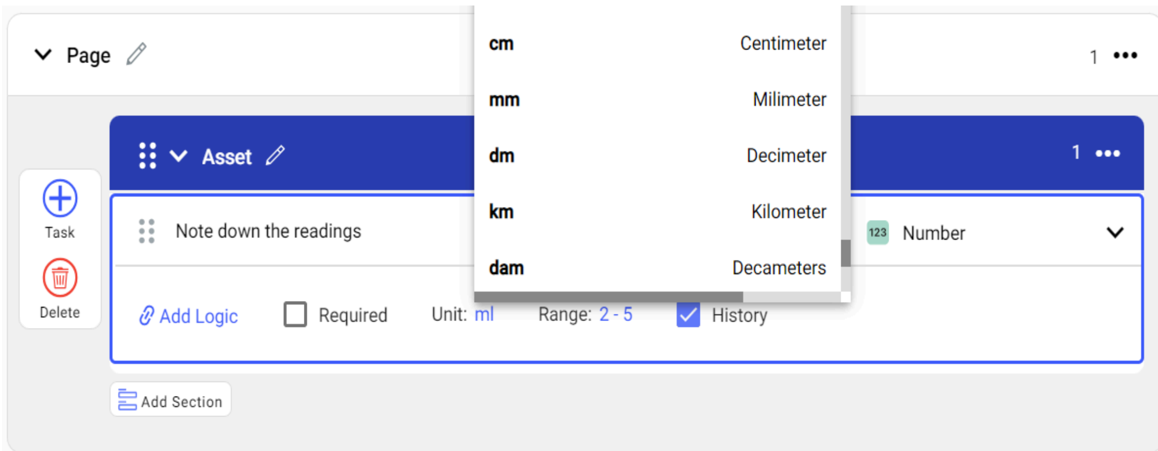
3.2.1.5.1. Number with the Unit of Measurement

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.

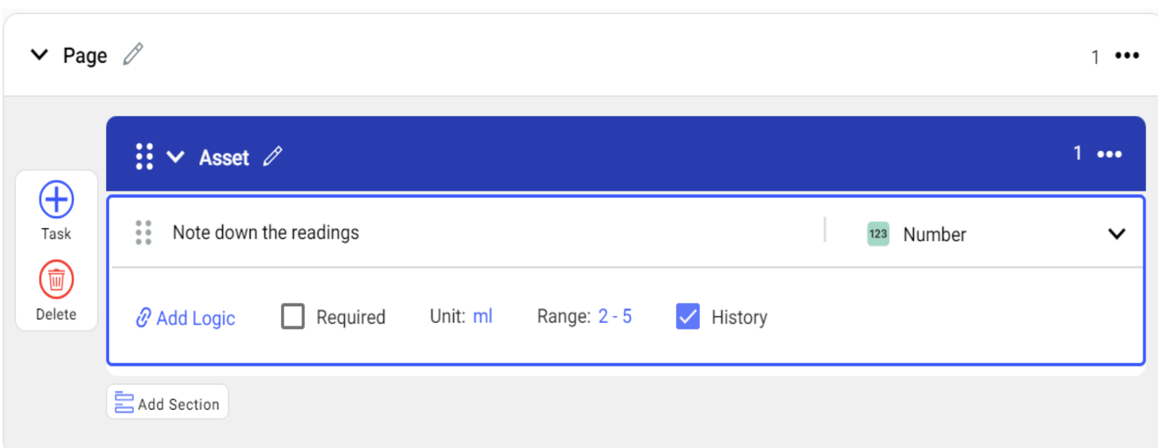
For example, the operator or technician records **85°C**, which is within the acceptable range.

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 147)*.
6. Select the **Required** check box if the value is required.



3.2.1.5.2. 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:

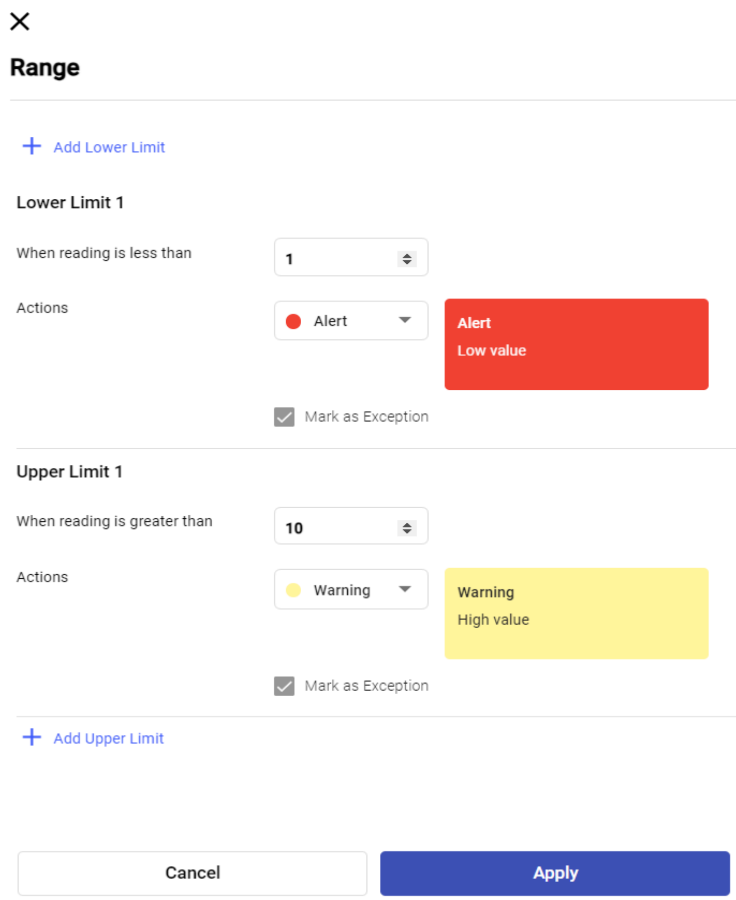
1. Enter a task or question as Does the valve actuator function within the specified range?.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the relevant **Unit** like Celsius (^{o}C) for the temperature. For more information, see Number with the Unit of Measurement *(on page 146)*.
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 3-24 Number Range



7. Click **Apply**.

3.2.1.5.3. Add Formulas to fields

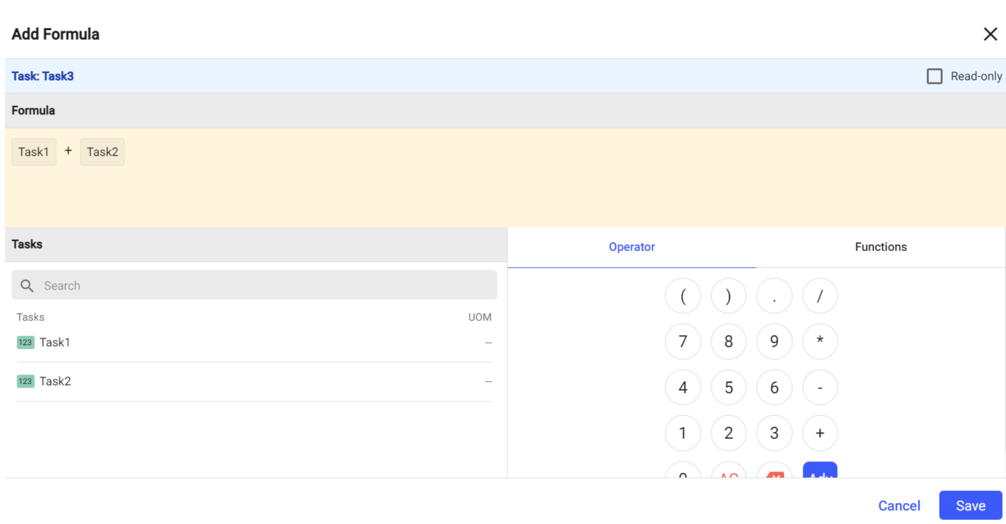
Formula in Number response type is used to automatically calculate values based on inputs from other fields. This is particularly useful for maintenance metrics like efficiency, operational performance, or usage calculations.

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 (°C), and so on. For more information, see Number with the Unit of Measurement *(on page 146)*.
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 3-25 Add Formula

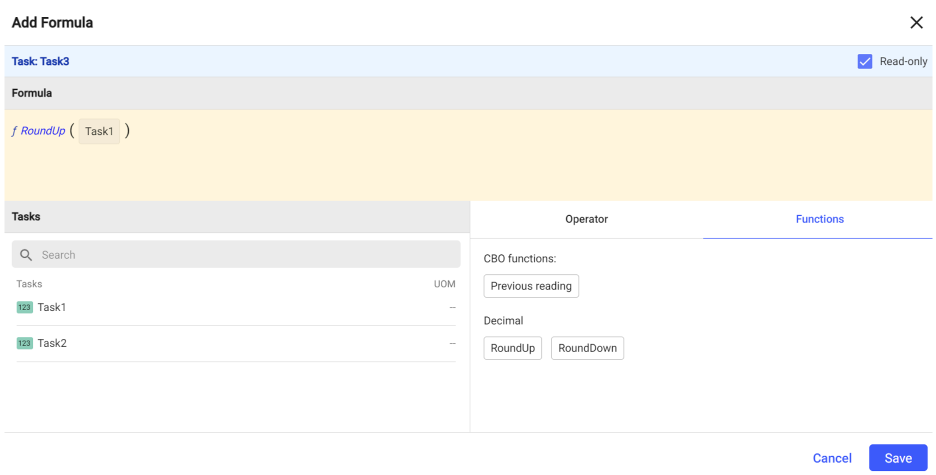


The configured formula is applied to the respective field and the calculated values are updated dynamically.

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 3-26 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.

3.2.1.6. Read Only Field

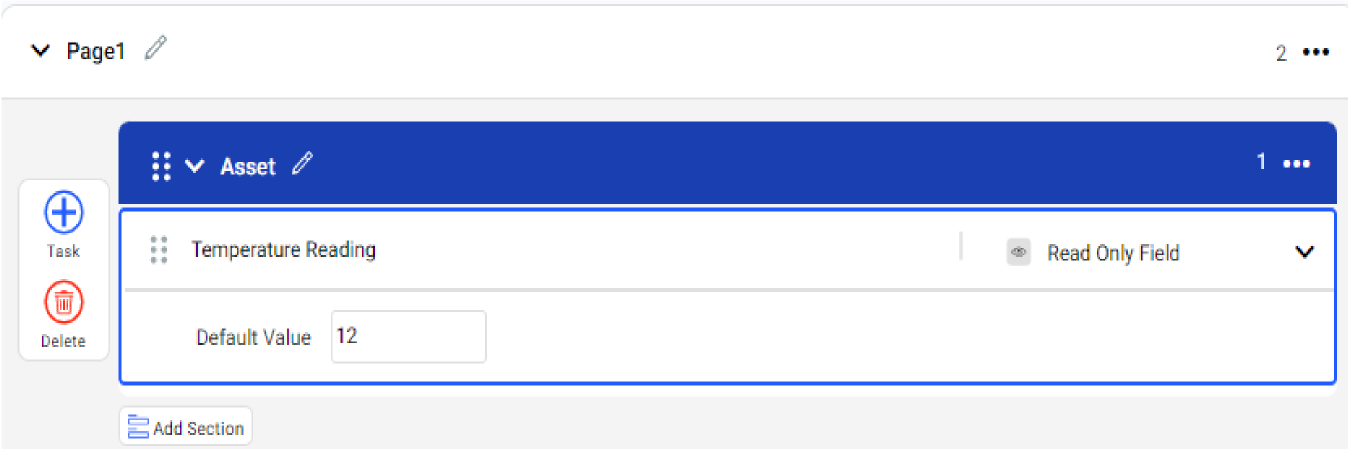
Read Only field response type is used in asset maintenance checks or inspections to display important information and prevent accidental changes to critical data. This response type is disabled for editing.

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 3-27 Read Only Response Type



3.2.1.7. Hyperlink

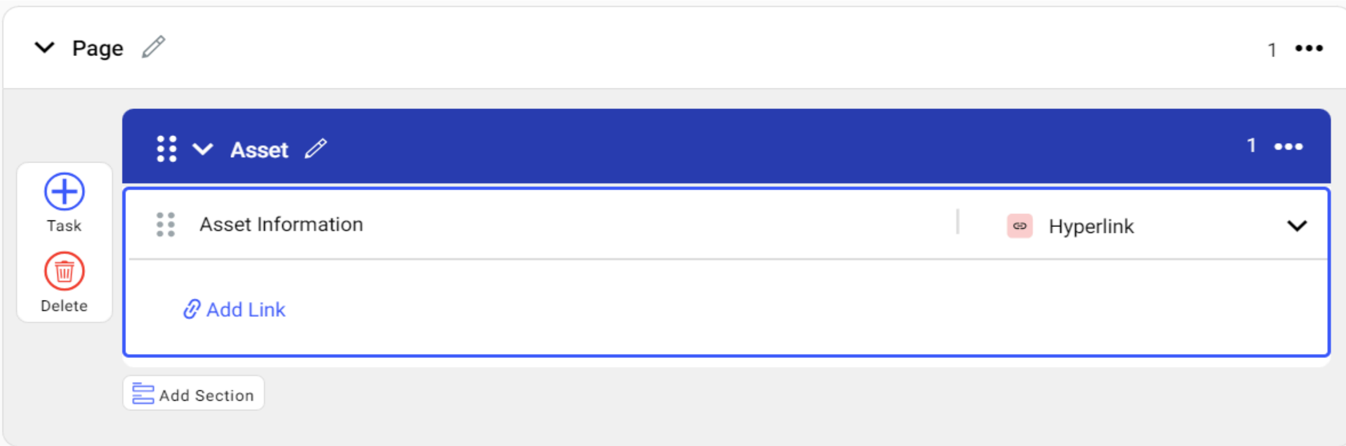
Hyperlink response type is use to link to external documents, such as user manuals or safety sheets.

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 3-28 Hyperlink Response Type



3.2.1.8. Slider

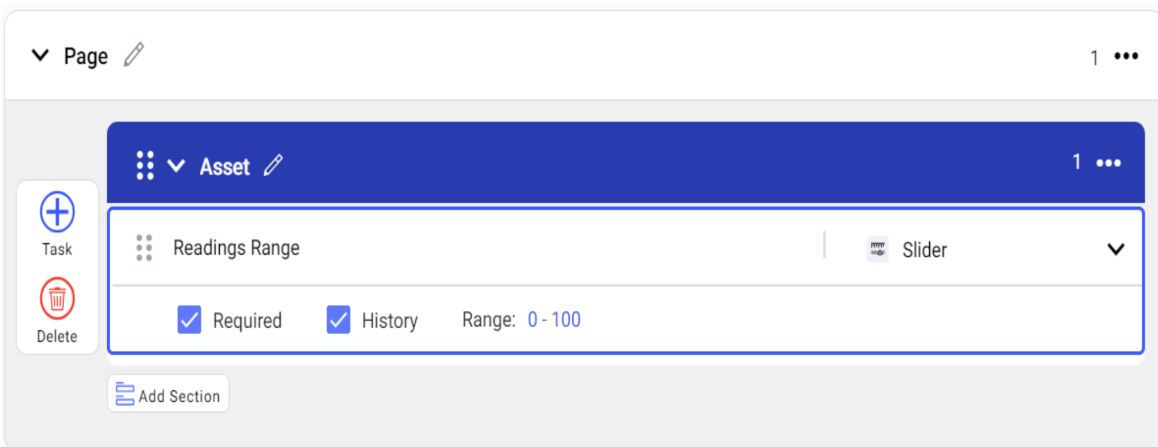
Slider response type is used to select a value from a continuous range for equipment performance parameters.

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.



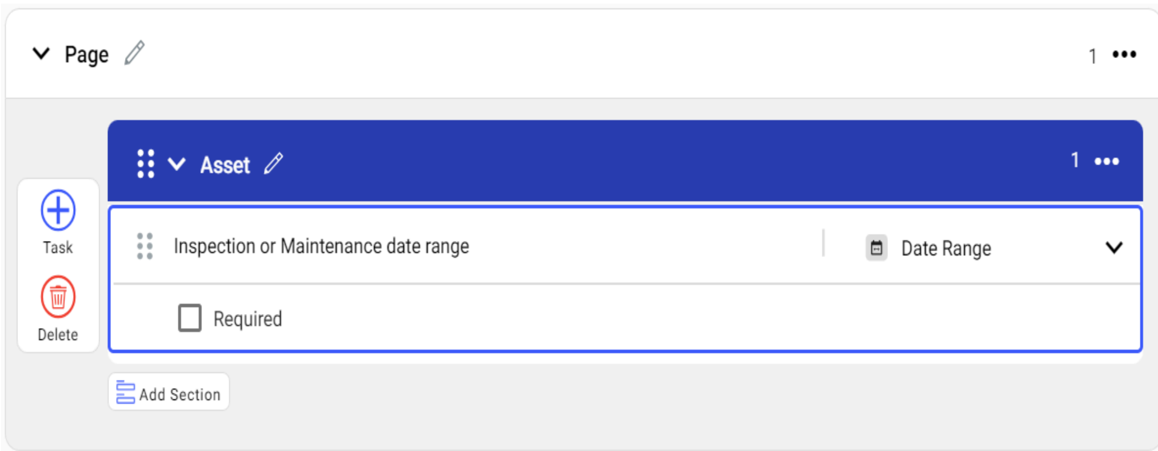
3.2.1.9. Date Range

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.



3.2.1.10. Date and Time

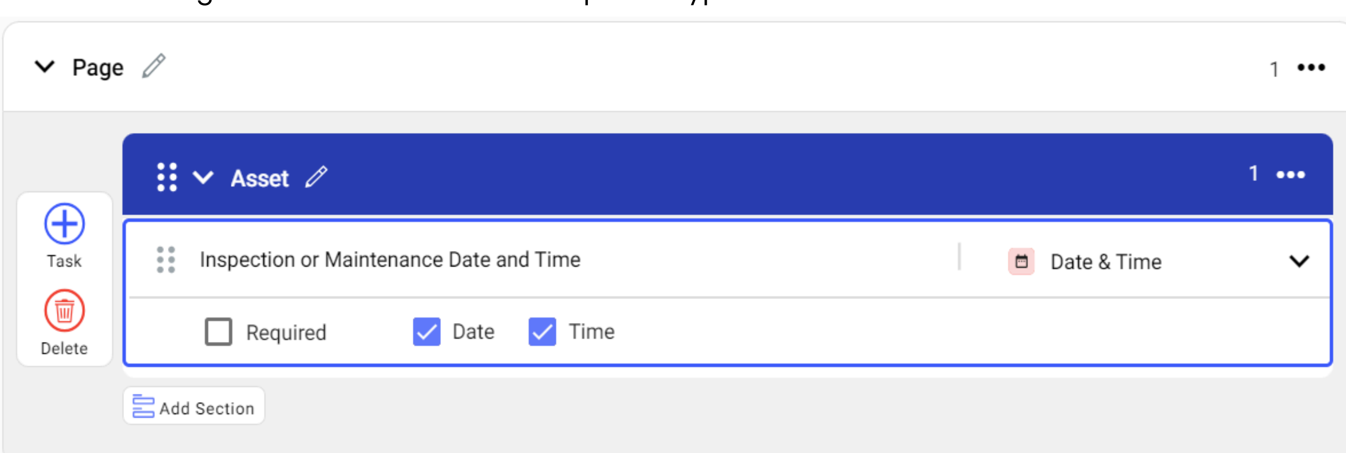
Date and Time response type is used to set future service dates or deadlines.

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 3-29 Date and Time Response Type



3.2.1.11. 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 163)*.
4. Select the **Required** check box if the value is required.

Figure 3-30 Checkbox Response Type

3.2.1.12. Attachment

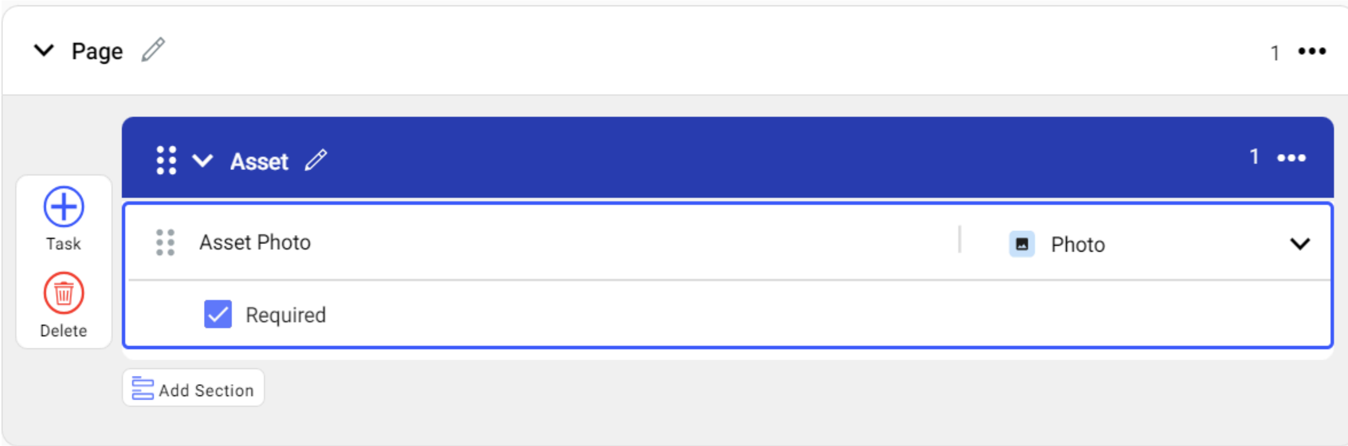
Attachment response type is used to upload files, such as photos or PDFs, to provide additional context.

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 3-31 Photo Response Type



3.2.1.13. Multiple Choice

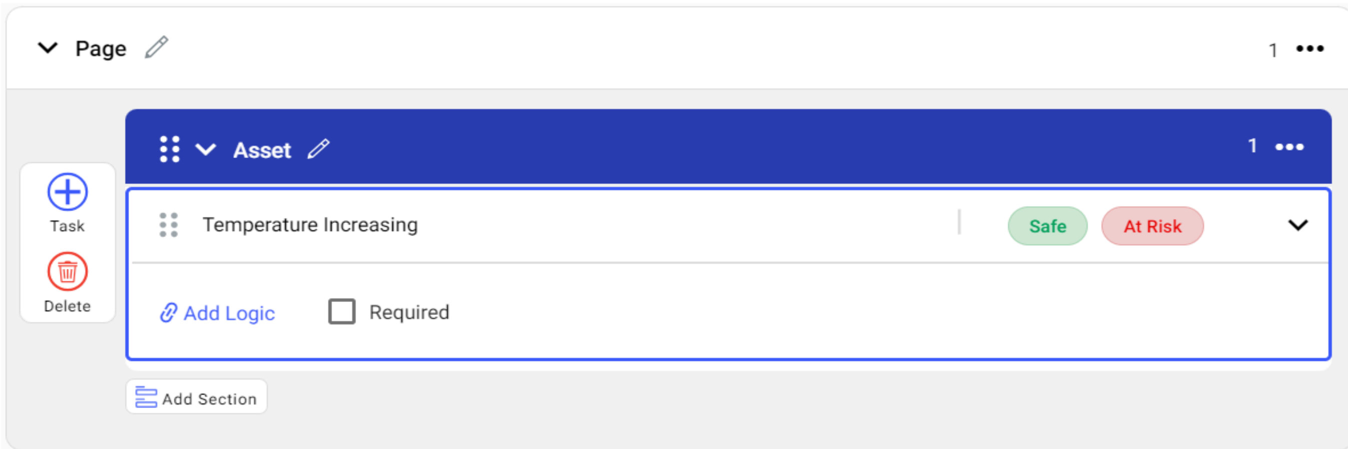
Multiple Choice is used to select predefined conditions for the equipment quickly.

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 3-32 Multi Choice Response Type

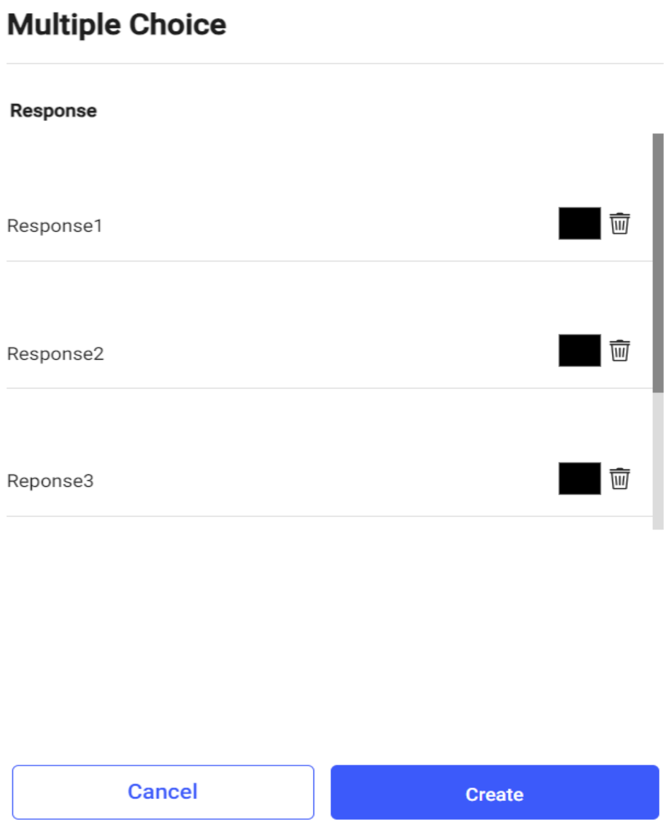


4. Click **Add More** if the required choice is not in the list.

Figure 3-33 Multiple Choice Add More

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

Figure 3-34 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

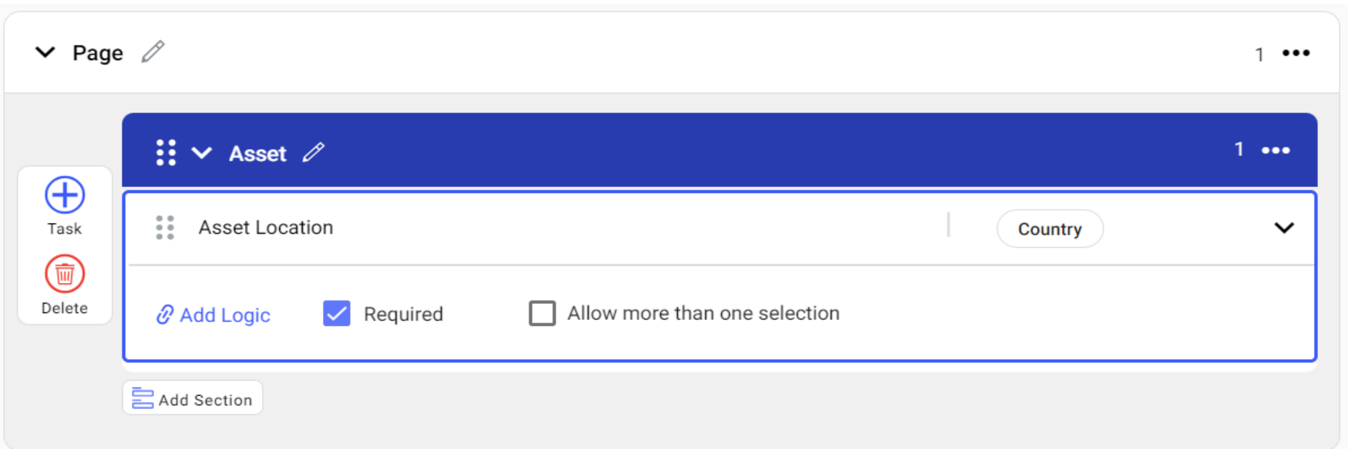
Global Picklist response type provides standardized lists that can be reused across different forms, ensuring consistent data entry such as, a list of manufacturers or equipment types.

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:

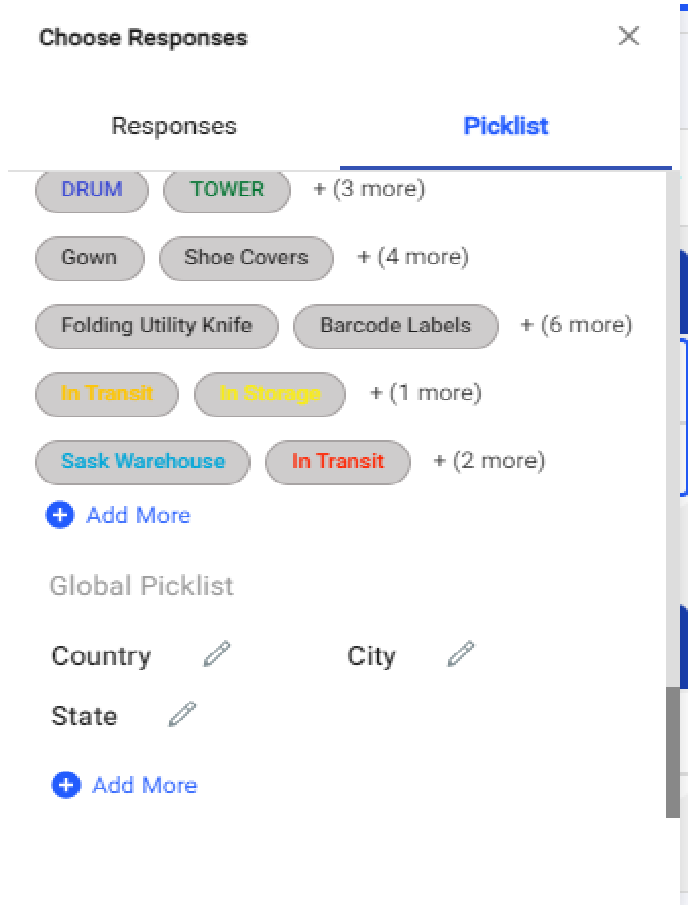
1. Enter a task or question as Select Valve Manufacturer.
2. Click the **Responses** drop-down and click the **Picklist** tab in the **Choose Responses** window.
3. Select the value in the **Global Picklist** section. For example, Country.
4. Click **Add More** in the Global Picklist section, if the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

Figure 3-35 Global Picklist Response Type



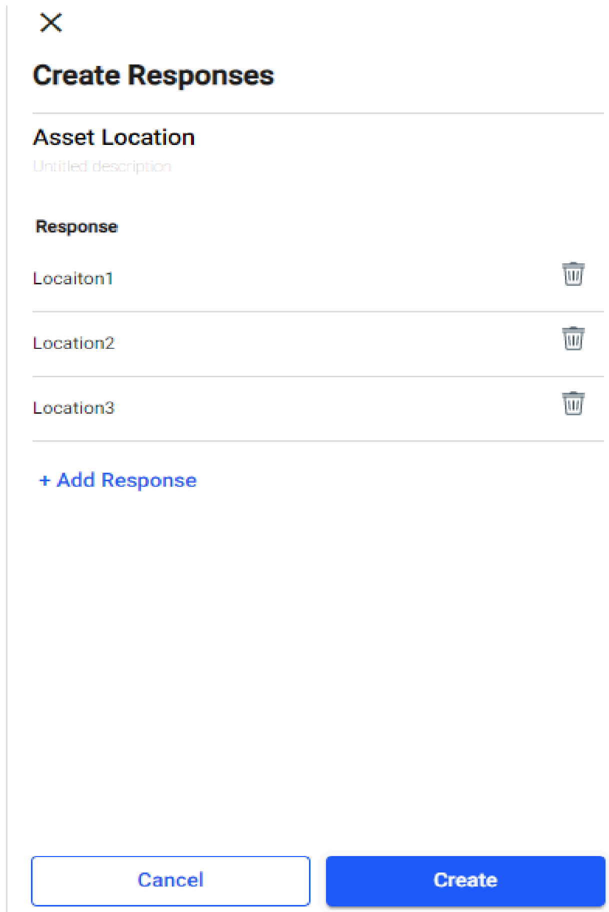
5. Click **Add More** if the required response is not in the list.

Figure 3-36 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 3-37 Global Picklist Add More



7. Click **Create**.

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

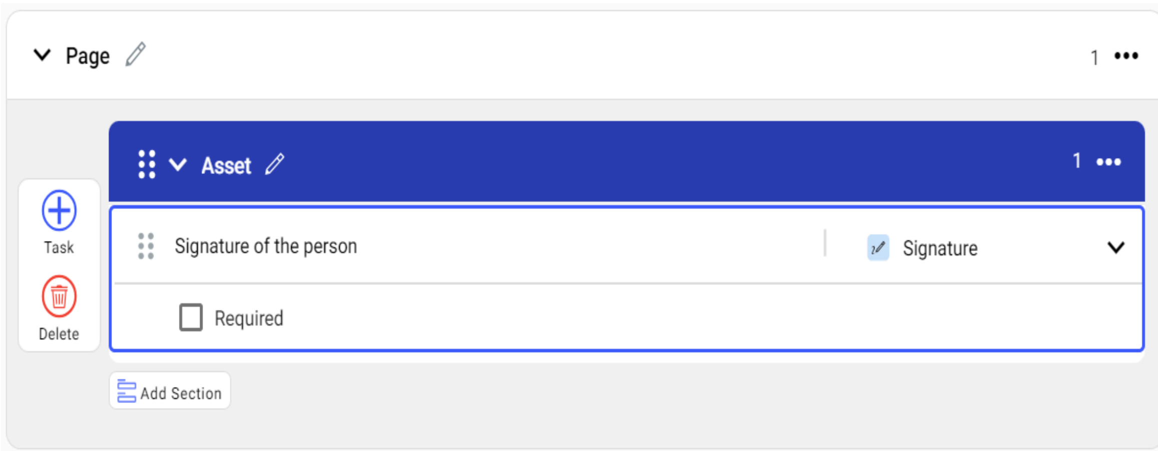
3.2.1.15. Signature

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.



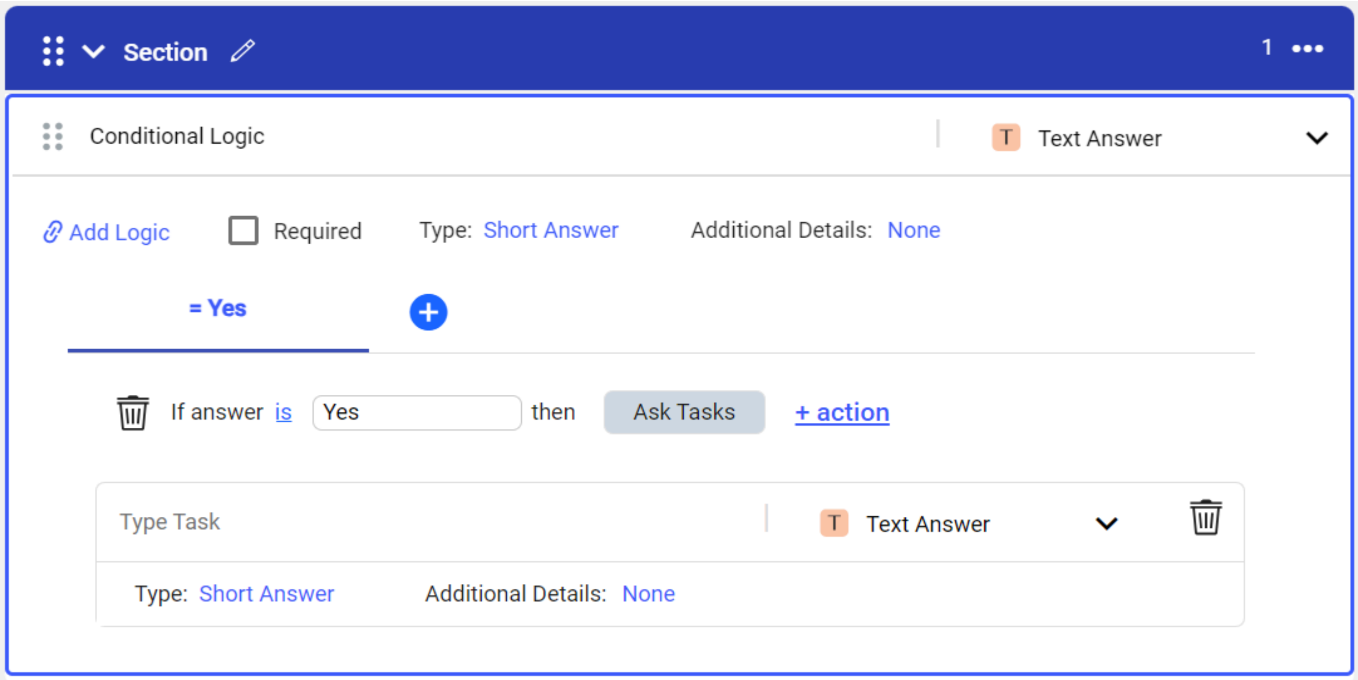
3.2.1.16. Conditional Logic

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 a Round Plan and Publish

Create round plans with multiple maintenance tasks, schedule, and publish them to efficiently manage asset maintenance.

To create a round plan:

1. Expand the **Operator Rounds** module and click **Round Plans** on the left-side pane.
2. In the **Round Plans** 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.

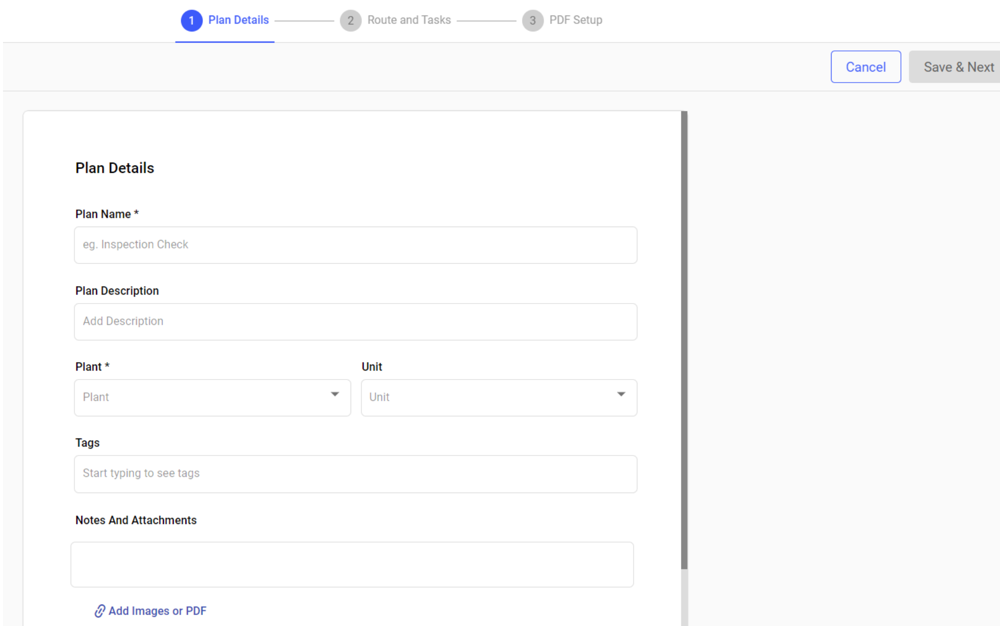
   Click **Create New**, select **Upload Excel**, select excel files, and click **Upload**.

   The round plans are uploaded, and you can see them in the **Round Plans** screen with Draft status.

   Open the round plan.

   The **Plan Details** screen is displayed.

Figure 3-38 Fill Plan Details



3. In the **Plan Details** screen, fill the following details:

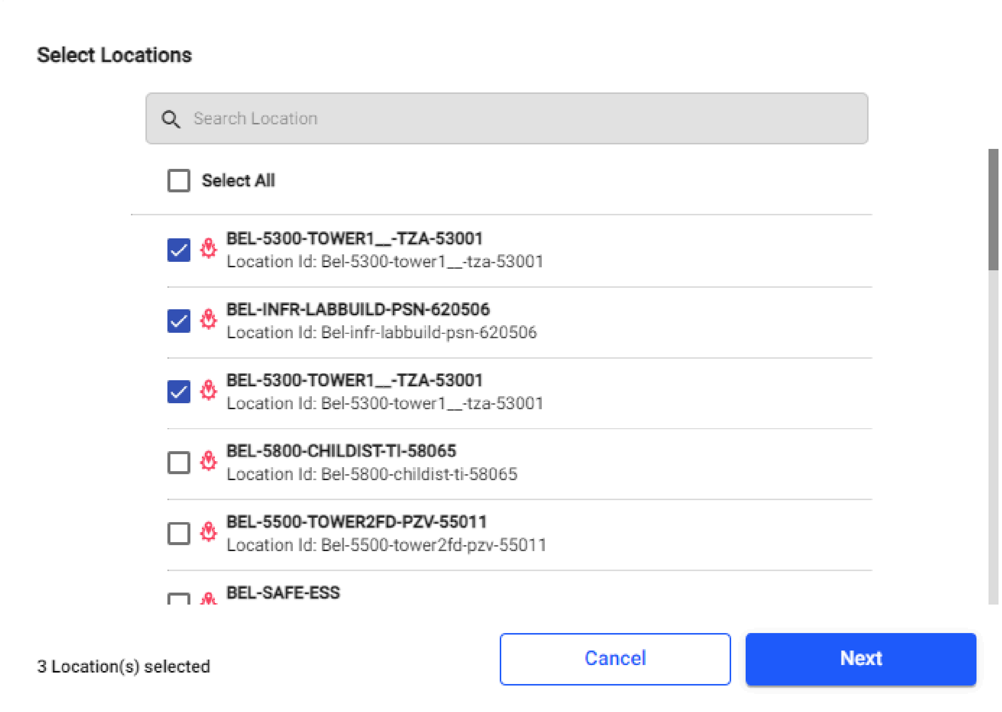
Table 3-1 Plan Details Screen Fields

Field	Description
Plan Name	Enter a name to identify the plan. For example, Control Valve Maintenance.
Plan Description	Add a short description. For example, Inspect and maintain control valves to ensure operational safety and prevent leaks.
Plant	Select a plant from the drop-down.
Unit	Select a unit (functional location) from the drop-down.
Tags	Add relevant tags.
Notes and Attachments	Attach relevant documents such as the Safety Guide-lines for handling control valves.

Field	Description
	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 rounds in areas with poor or no network connectivity.
Zone	Select one or more zones from the list to execute the round within the selected zone by operator.
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 operator 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 round plans are created and scheduled.

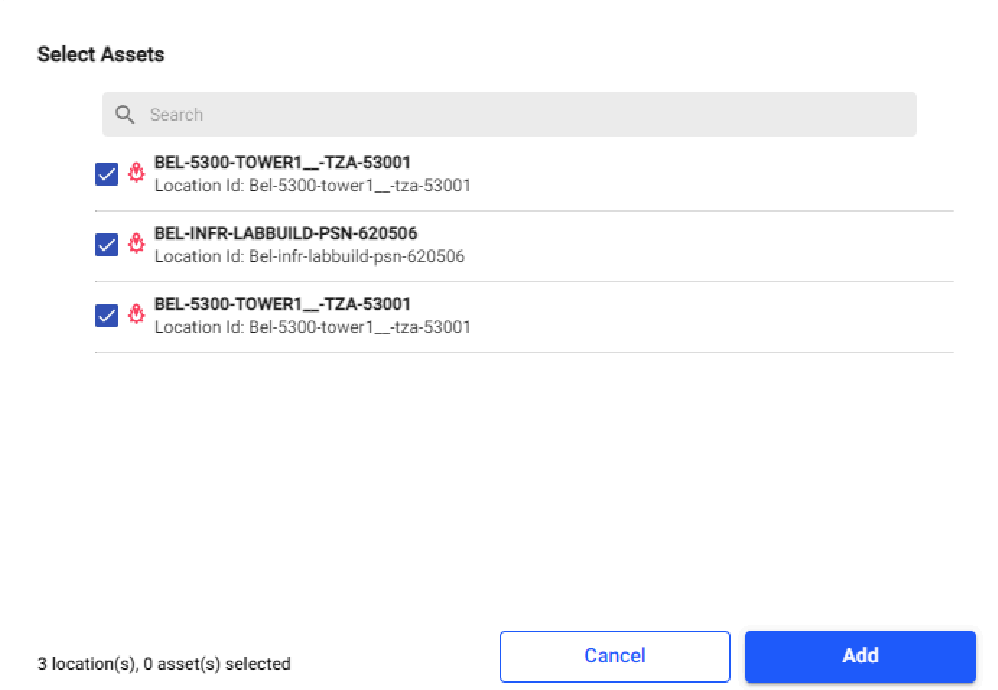
4. Click **Save & Next**.
5. In the **Select Locations** window, select locations and click **Next**.

Figure 3-39 Select Locations



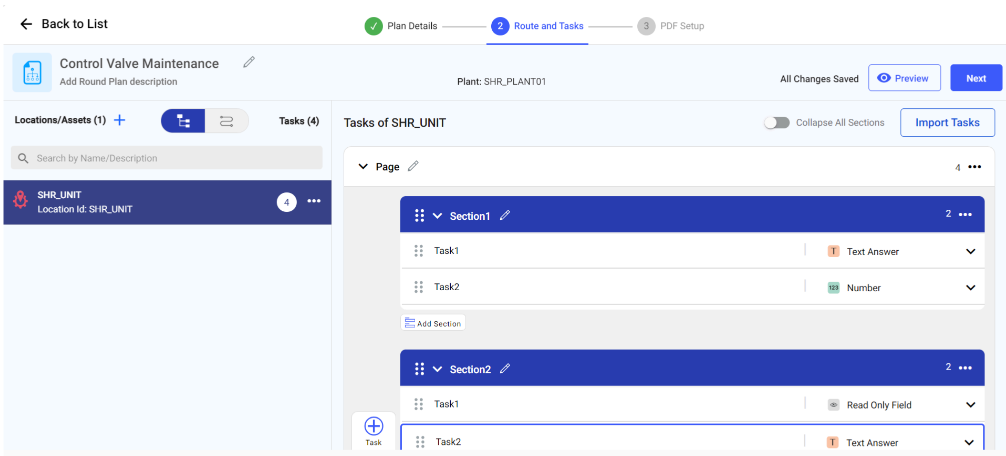
6. In the **Select Assets** window, select assets and click **Add**.

Figure 3-40 Select Assets



The selected location and assets hierarchy is displayed on the left side.

Figure 3-41 Location and Asset Hierarchy



7. In the **Route and Tasks** screen, select the location or asset on the left side, create a round plan with multiple sections, add tasks and response types for the selected location or asset:
   - To add locations and assets from the left side pane click the Add Locations/ Assets + icon. You can drag and drop locations/assets to either hierarchy or a flat list. Locations and Assets hierarchy appears as a route plan.
   - To view the locations and assets either in hierarchy or flat list mode, click .
   - To see the locations and assets as a route plan, click .
   - To view locations and assets hierarchy, click the More ••• icon and select **Show Hierarchy**. You can also copy and delete the locations and assets.
   - To add a page, click the **Add Page** button.
   - To add task, click the **Task** ⊕ button inside the section. When you click the button, the screen displays the following options,

- **Type Task**: Enter the task in the text box.
- **Responses**: Select the relevant response type from the drop-down. For information about each response type, see Understanding Response Types Used for Creating Round Tasks *(on page 139)*.
- **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 163)*.
- **Required**: Select the check box to make the question mandatory to fill.
- **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 task. 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 operator 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 round plans are created and scheduled.

- You can import sections and tasks from the template to create a round plan quickly. For more information, see Import Sections and Tasks from Template *(on page 177)*.
- You can cut, paste, and copy tasks to locations/assets.
    - Right-click on the task, select **Copy to**, select **All Locations / Assets**, and click **Continue to Copy** to copy the task to all locations & assets present in Route Plan view.
    - Right-click on the task, select **Copy to**, and select **Custom Locations / Assets**. In the **Select Locations / Assets to Copy** window, select **locations and assets**, click **Done**, and click **Continue to Copy** to copy the task to selected locations and assets.
    - Right-click on the task > select **Cut** to cut the task.
    - Right-click on the task > select **Paste** to paste the task.
    - Right-click on the task > select **Copy Below** to copy the task below the current task.
- To add more sections, click the **Add Section** button.

- Click the More icon > select **Copy Below** on the right-side of the section to copy the section below the current section.
- Click the More icon > select **Copy Above** on the right-side of the section to copy the section above the current section.
- Click the More icon > select **Copy Section to** on the right-side of the section to copy the section to all or specified locations or assets.
- Click the More icon > select **Unlink Section** on the right-side of the section to unlink the round plan if the section is linked to the round plan.

> **Note:**
> Hover the mouse on the link icon before the section name to view the linked round.

- Click the More icon > select **Delete** on the right-side of the section to delete the section.

> **Note:**
> You cannot delete the task which is part of the template.

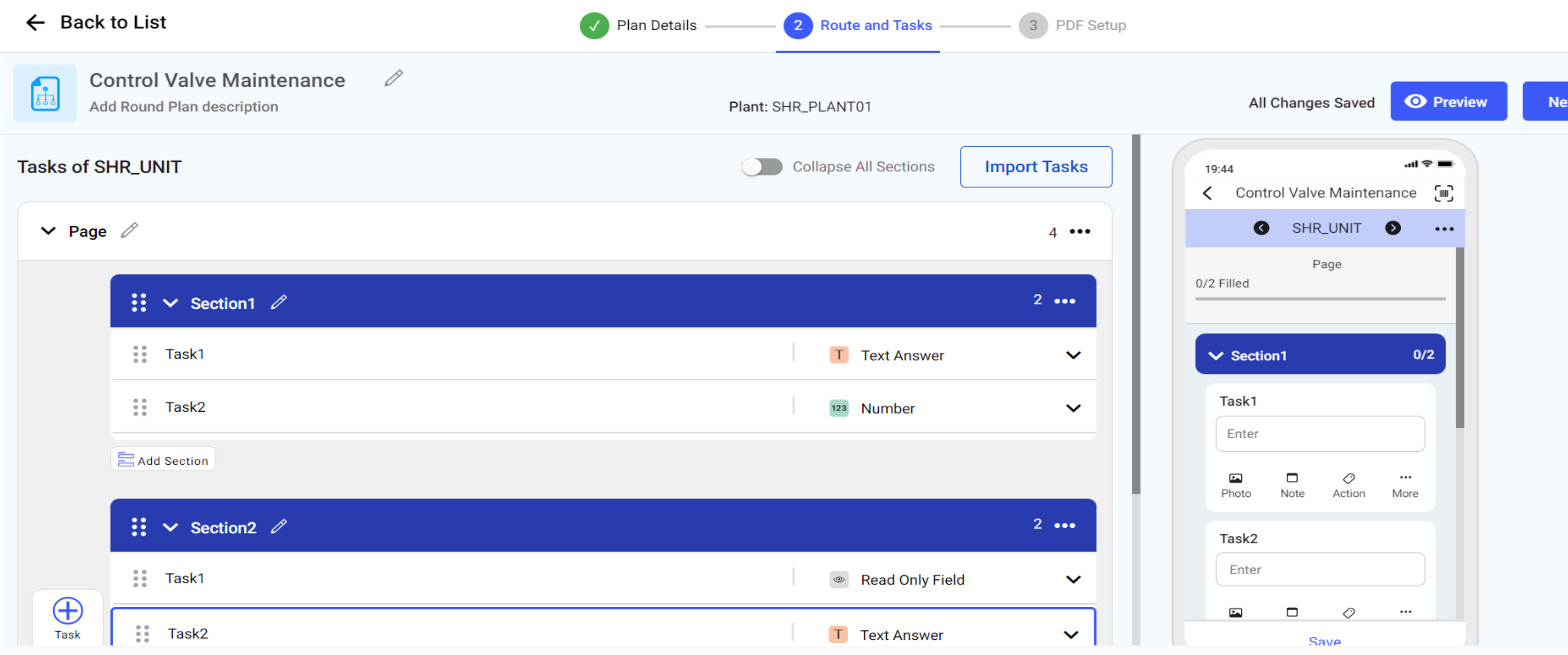
- You can also see the count of tasks on the section.

◦ To add more pages, click the **Add Page** button.

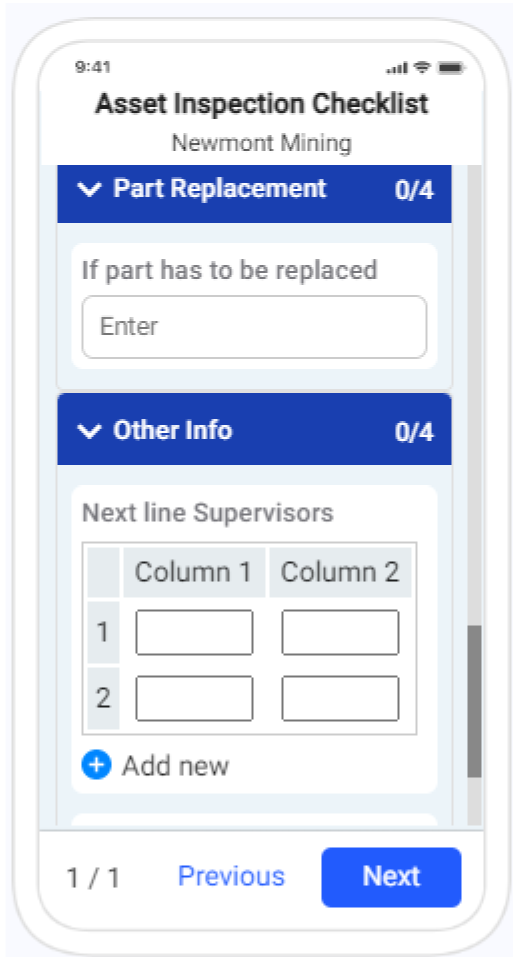
- Click the More icon > select **Copy Below** on the right-side of the page to copy the page below the current page.
- Click the More icon > select **Copy Above** on the right-side of the page to copy the page above the current page.
- Click the More icon > select **Copy Page to** on the right-side of the page to copy the page to all or specified locations or assets.
- Click the More icon > select **Delete** on the right-side of the page to delete the page.

8. Click the **Preview** button to see the round plan preview.

Figure 3-42 Round Plan Preview



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



9. Click **Next** to view the preview in PDF format that generates once the round plan is filled and submitted by the Operator from the mobile application.

Figure 3-43 Round Plan 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 181)*.

10. Click **Send for Approval**.
11. Review the details and click **Approve & Publish**.
12. Add comments and click **Comment and Approve**.

    Or

    Click **Reject** if you find any issues.

    The round plan is approved and published, and you can view the published round in the **Round Plans** screen with **Published** status and in the **Scheduler** screen with **Schedule** option.

3.2.2.1. Example of Round Plan Creation

Learn how to create a round plan by following a detailed example.

Let us create a round plan for periodic Control Valve Maintenance checks:

1. In the **Round Plans** screen, click **Create New** at the top-right corner.
2. In the **Plan Details** screen, fill out the following fields:
    - **Plan Name**: Enter **Control Valve Maintenance**.
    - **Plan Description**: Enter **Inspect and maintain control valves to ensure operational safety and prevent leaks**.
    - **Plant**: Select **1000 - Plant MH**.
    - **Tags**: Enter **Control Valve, Safety, Maintenance**.
    - **Notes**: Attach relevant documents such as the **Safety Guidelines** for handling control valves.
3. Click **Save & Next**.
4. In the **Select Locations** window, choose the location **BEL-5500-TOWER2FD-PZV-55011**.
5. In the **Assets** window, select the asset **Control Valve BEL-5500-TOWER2FD-PZV-55011**.
6. Click **Add Page** to create sections.
7. Add following sections inside the **Page 1**:
    - Section 1: **Control Valve Performance**
    - Section 2: **Control Valve Readings**
8. Open the Section 1 and add the following:

  - Add task 1 as **Does the control valve show any signs of sticking during operation?** and select **Short Text Answer** response type.
  - Add task 2 as **Are there visible leaks around the control valve body?** and select **Long Text Answer** response type.
  - Add task 3 as **Are the control valve position indicators functioning?** and select **Number** response type.
9. In Task 3, add logic to check whether readings are correct.
  - If the operator selects **No**, prompt them to raise an issue and upload a photo of the valve.
10. Open Section 2 and add the following:
  - Task: **Is the control valve displaying accurate temperature readings?**.
  - **Response Type**: Number with unit (°C).
  - **Set range**: Lower Limit 50°C, Upper Limit 100°C.
  - **Conditional Logic**: Raise an alert if outside the range.
11. Click **Preview**.
12. Click **Next** to view the preview in PDF format.
13. Click **Publish**.

3.2.2.2. Import Sections and Tasks from Template

While creating a new round plan, you can import sections and tasks from an existing template to quickly build the plan and save hours of your time.

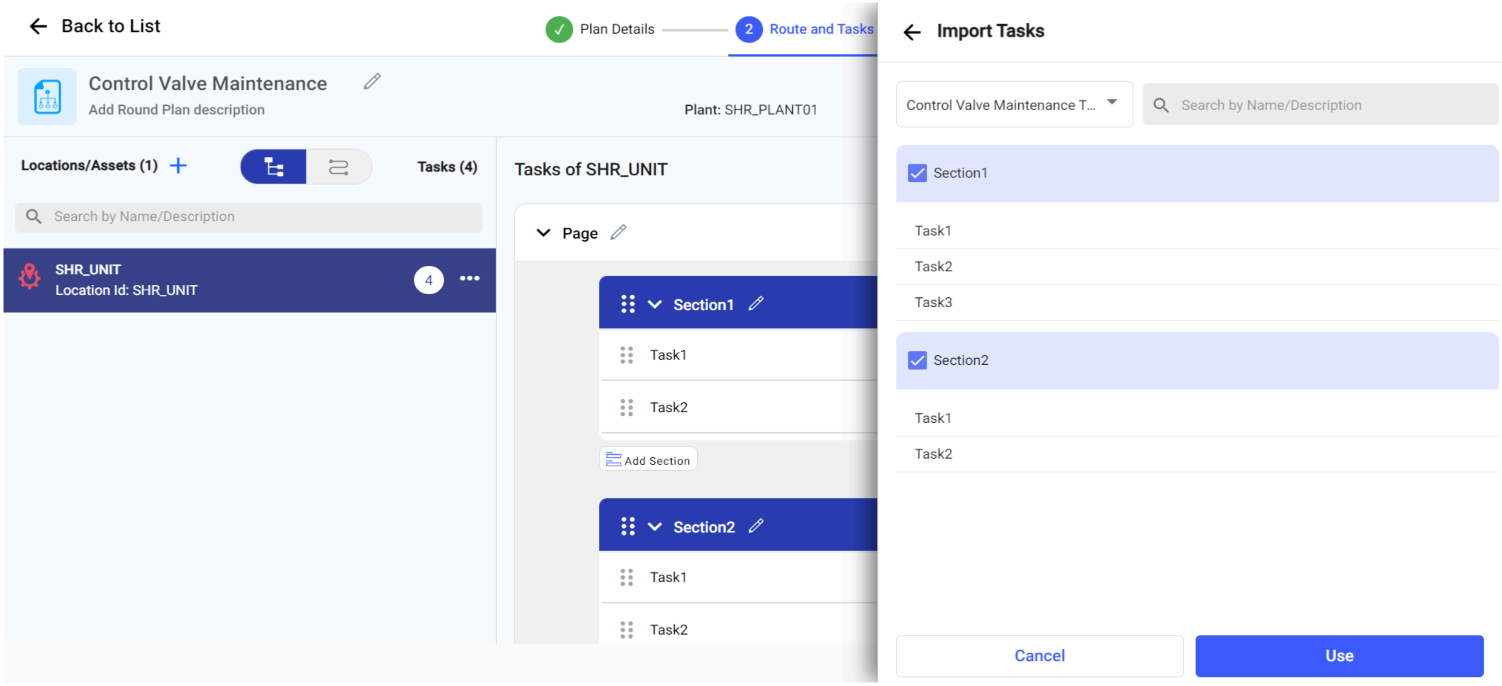
To import sections and tasks from the template:

1. Expand **Operator Rounds** and select **Round Plans** section.
2. In the **Round Plans** screen, click **Create New** and select **Create Manually**.

   or

   Select the existing round plan and click **Edit Round** on the right-side window
3. In the **Plan Details** screen, update the details like **Plan Name**, **Plan Description**, **Tags**, **Notes and Attachments**, & **Additional Details**.
4. Click **Save & Next**.
5. Click the **Import Tasks** button on the right side.
6. In the **Import From** window, click the **Templates** tab.
7. Select the template from the list.

Figure 3-44 Import Tasks



Note:

- By default, one filter of the Location/Asset is applied, which the user is currently working on. You can remove the filter to see a list of templates irrespective of the assets or plants.
- You can do a fuzzy search or search the templates associated with the tags. For example, Maintenance.

8. Select the whole section with tasks and click **Use**.
9. Select **Add as new page** or **Add to existing page** option.
10. Click **Import**.

    The selected sections with tasks are imported successfully into the round plan.

3.2.2.3. Create Round Plans from Existing Ones

You can copy an existing or similar round plan and make minor changes to create a new round plan quickly.

To copy an existing round plan and create a new one:

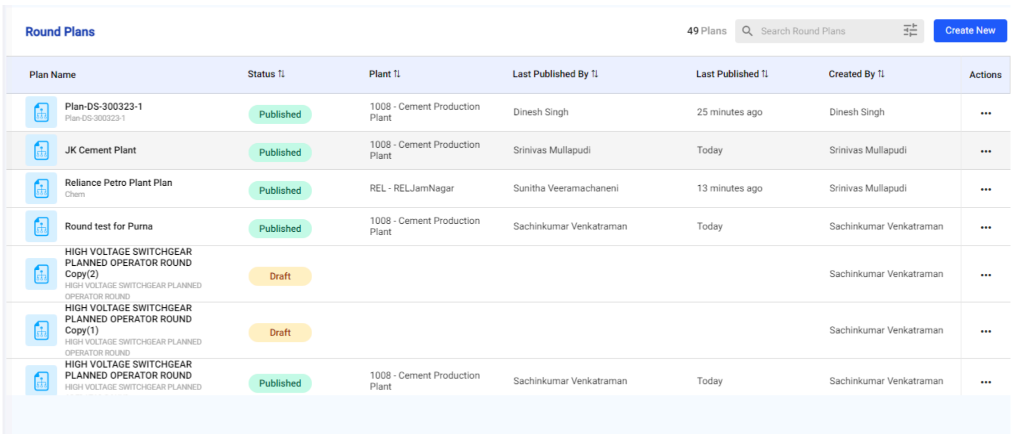
1. Click the **Round Plans** section on the left-side pane.

   The **Round Plans** screen with the list of draft and published round plans is displayed.

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

   The copied round plan is displayed in the list with draft status.

   Figure 3-45 Copied Round



3. Click on the copied round plan to view the details on the right-side window and click **Edit Plan**.

   Or

   Double-click the round to open the edit screen.

4. Update or modify the tasks and other details as required and publish. For information, see Modify Round Plans *(on page 179)*.

3.2.2.4. Modify Round Plans

Modifying round plans allows you to update the tasks, schedules, or assigned operators in response to changing priorities or new information.

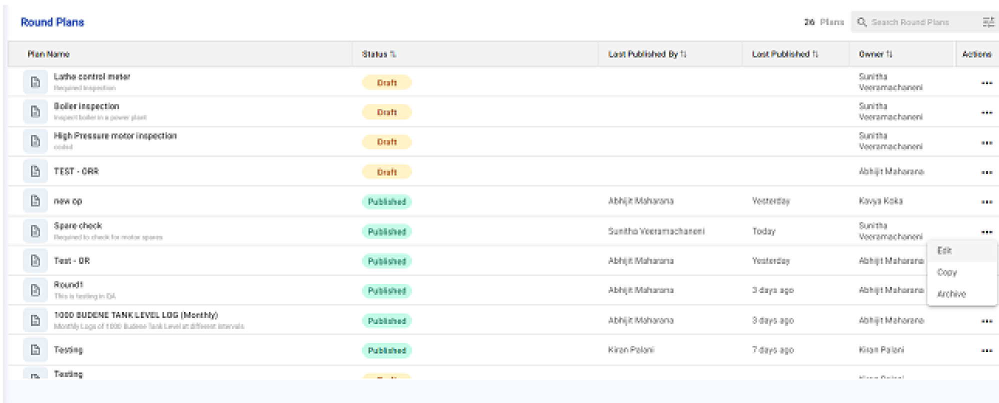
To edit a round plan:

1. Click the **Round Plans** section on the left-side pane.

   The Round Plans screen with the list of draft and published round plans is displayed.

2. Click the More icon > **Edit** for the selected round plan.

   Figure 3-46 Edit Rounds

3. Update the round plan details as required.
4. Click **Publish** to re-publish the round.

3.2.2.5. Create an Ad-Hoc Round

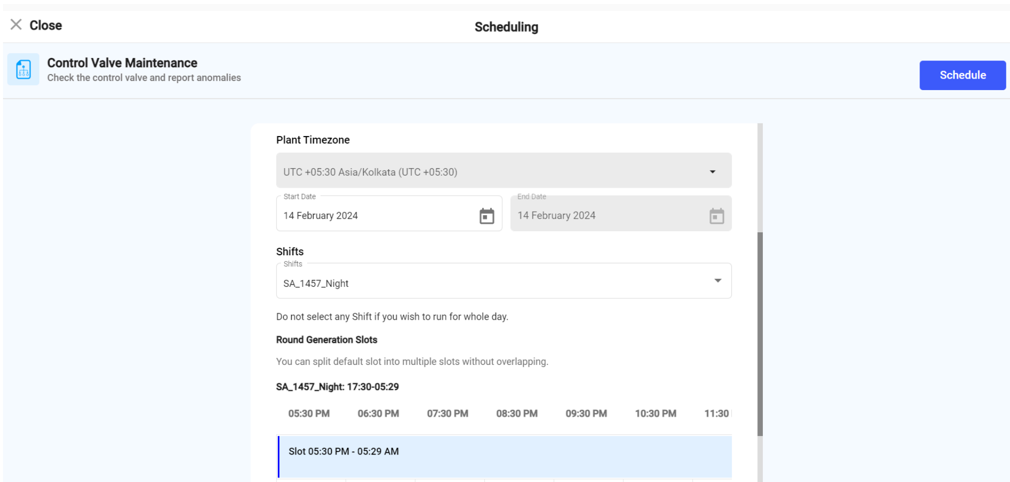
Ad-hoc tasks in mRounds allow supervisors to address urgent or unplanned maintenance activities that are not part of the regular round plans. These tasks can be created on the fly to handle issues that require immediate attention, such as equipment failures or safety concerns. Once created, ad-hoc tasks can be assigned to available operators, ensuring quick resolution of critical problems.

For example, if a control valve suddenly malfunctions and needs immediate inspection, you can create an ad-hoc task for an operator to address the issue as soon as possible.

To generate an ad-hoc round in the web app:

1. Expand the **Operator Rounds** and click **Scheduler**.
2. In the **Plans** tab, click the More icon and select **Create Ad Hoc Rounds** for the selected round.
3. Fill the scheduling details.

Figure 3-47 Create Ad Hoc Round



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

4. Click **Schedule**.

A message "Scheduled Successfully" appears with **View Rounds** and **Close** buttons. Click **View Rounds** to view the newly created ad hoc round.

To view the list of ad hoc rounds, in the **Plans** tab, click the Menu icon > **Show Ad Hoc Round** and you can view the round in the Rounds tab.

3.2.2.6. 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.

3.2.3. Review and Approve Round Plans

Supervisors review and approve newly created or edited round plans to ensure quality control, adherence to standards, and prevent errors before publishing.

This topic contains the following sub topics:

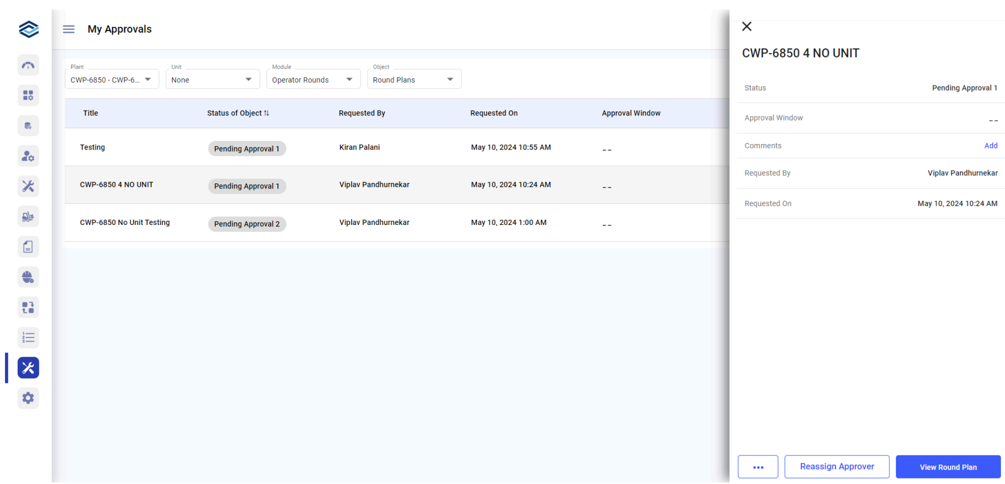
3.2.3.1. Review and Approve Round Plan to Publish

This section allows supervisors to view pending round plans approval requests assigned to them and track the status of their own submitted requests.

To approve round plan request for publishing:

1. Expand **Workflows** and select **My Approvals**.
   You can view the list of round plans, which are pending for approval.
2. Click on the round plan.
   The round plan summary is displayed on the right-side.

   Figure 3-48 Approve Round Plan

3. Click the More icon and select **Approve Round Plan**.
4. In the **Add Approval Comment** popup, add comments and click **Comment and Approve**.

   Or

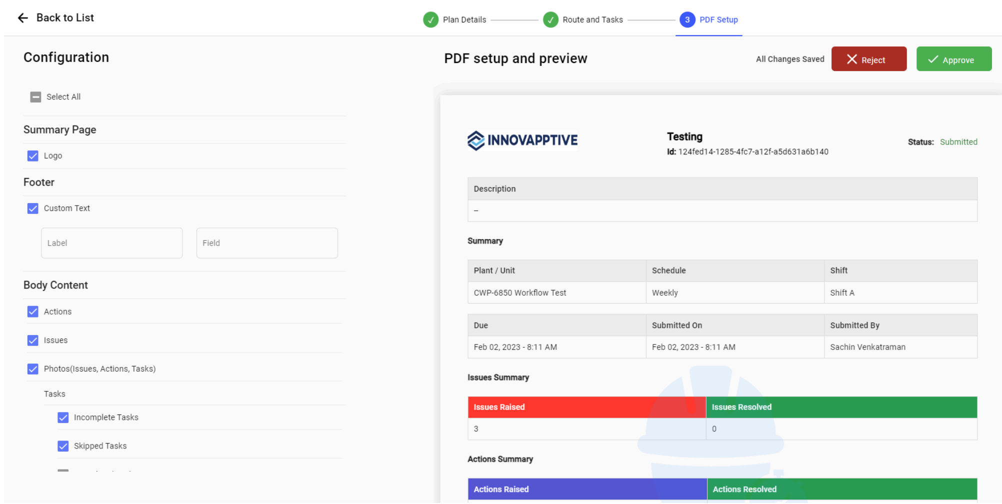
   Click **View Round Plan** to view the round plan details.

   Review the details and click **Save and Next**.

   Click **Next**.

   Click **Approve**.

Figure 3-49 Approve



Note:

You can click **Reassign Approver** to reassign the round plan to a user, user group, or position.

In the **My Approvals** screen, you can,

- Filter the round plans based on **Plant**, **Unit**, **Module**, and **Object**.
- Search the round plans using the **Search** bar.
- Click the More icon and select **View Round Plan** to view the round plan details and approve.
- Click the More icon and select **Add Comment** to add comments.
- Click the More icon and select **View Details** to view the round plan summary.
- Click the More icon and select **View Approval Trail** to view the approval details.

3.2.3.2. Create a Custom Workflow

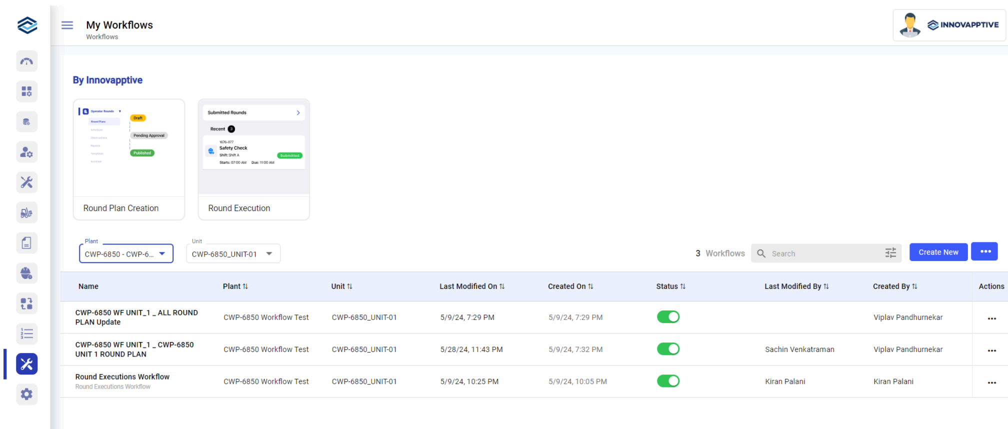
This section allows you to create and configure custom approval workflow for equipment inspections tailored to the specific needs of a plant.

To create a workflow:

1. Expand **Workflows** and select **My Workflows**.

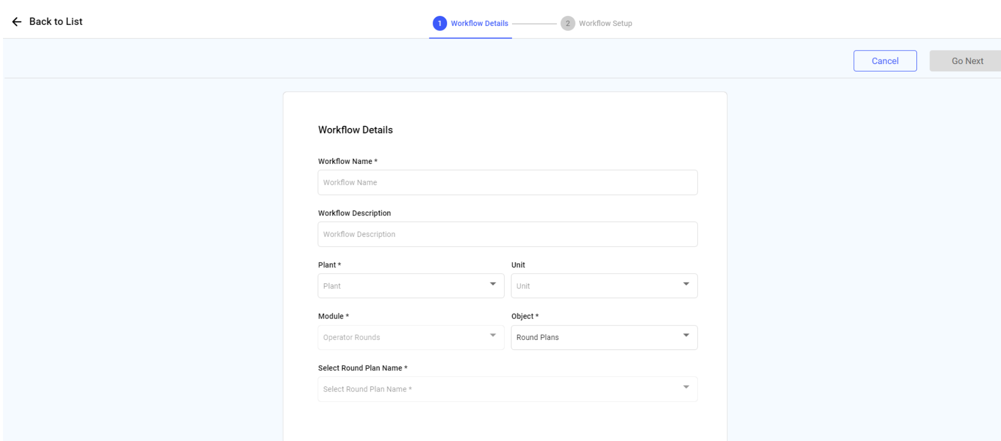
   The list of predefined workflows is displayed.

   Figure 3-50 My Workflows



2. Click **Create New** on the right-side.
3. In the **Workflow Details** screen,

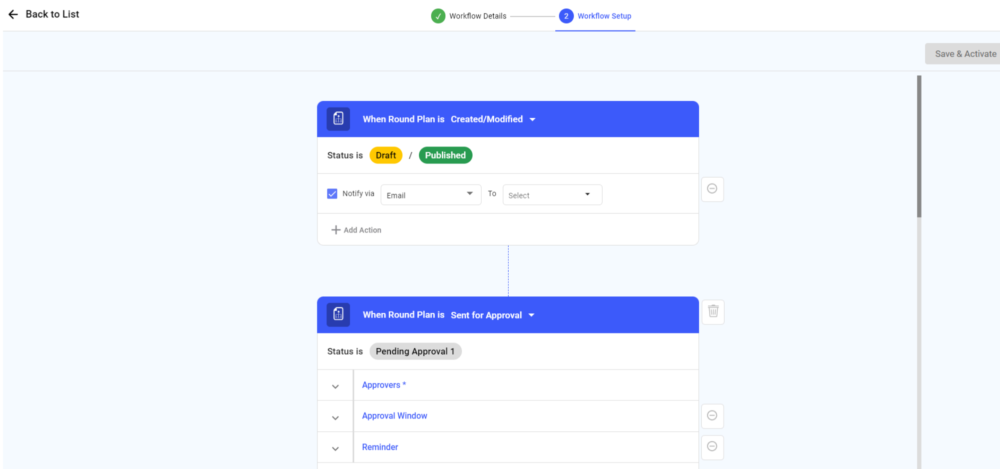
   Figure 3-51 Workflow Details Screen



   a. Enter the workflow name in the **Workflow Name** field.
   b. Enter the description in the **Workflow Description** field.
   c. Select **Plant**, **Unit**, **Module**, and **Object** from the list.
   d. Select a round plan from the **Select Round Plan Name** list.

4. Click **Go Next** on the top right.

Figure 3-52 Workflow Setup Screen



5. In the **Workflow Setup** screen, fill the required details to create a flow and click **Save & Activate**.

   The workflow is created.

3.2.3.3. Maintain Approval Audit Trail

This section allows you to track and review the approval history for equipment inspections to ensure accuracy, transparency and compliance of round plan approvals.

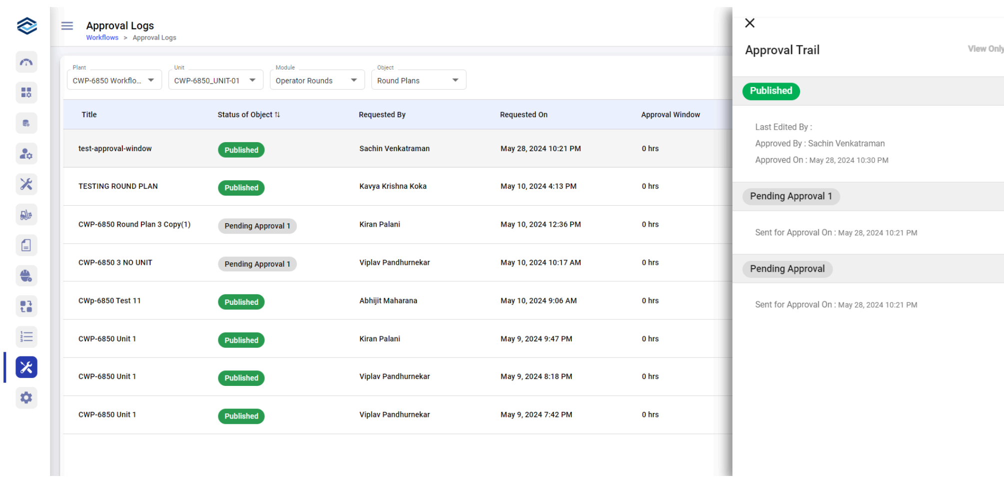
To view the approval logs:

1. Expand **Workflows** and select **Approval Logs**.

   The list of approved requests is displayed with **Pending Approval** and **Published** status.

2. In the **Approval Logs** screen, you can,
   - Filter approval requests based on **Plant**, **Unit**, **Module**, and **Object**.
   - Search approval requests using the **Search** bar.
   - Click the More icon and select **View Round Plan** to view the plan details.
   - Click the More icon and select **View Approval Trail** to view the approval details.

Figure 3-53 Approval Logs Screen



3.2.4. Schedule Round Plans

The **Schedule Round Plans** feature in the mRounds web app allows supervisors to automate the execution of maintenance rounds by scheduling them at specific intervals. This ensures that critical equipment checks and maintenance tasks occur regularly, reducing the risk of missed inspections or equipment failures.

You can schedule rounds at header or task level by dates or by frequency like daily, weekly, bi-weekly, monthly, and assign them to operators based on their availability during shifts and slots. You can also add a buffer period to a round execution time. Only the approved and published rounds can be scheduled and assigned to operators.

The assigned rounds are visible and accessible in the mRounds mobile application. The operators work on their rounds, fill in their responses, and submit completed round plans.

Published round has the following status:

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

3.2.4.1. Schedule Round Plans by Frequency

Schedule round plans at header level by frequency to run weekly, monthly or yearly on a particular day of the week, month or year.

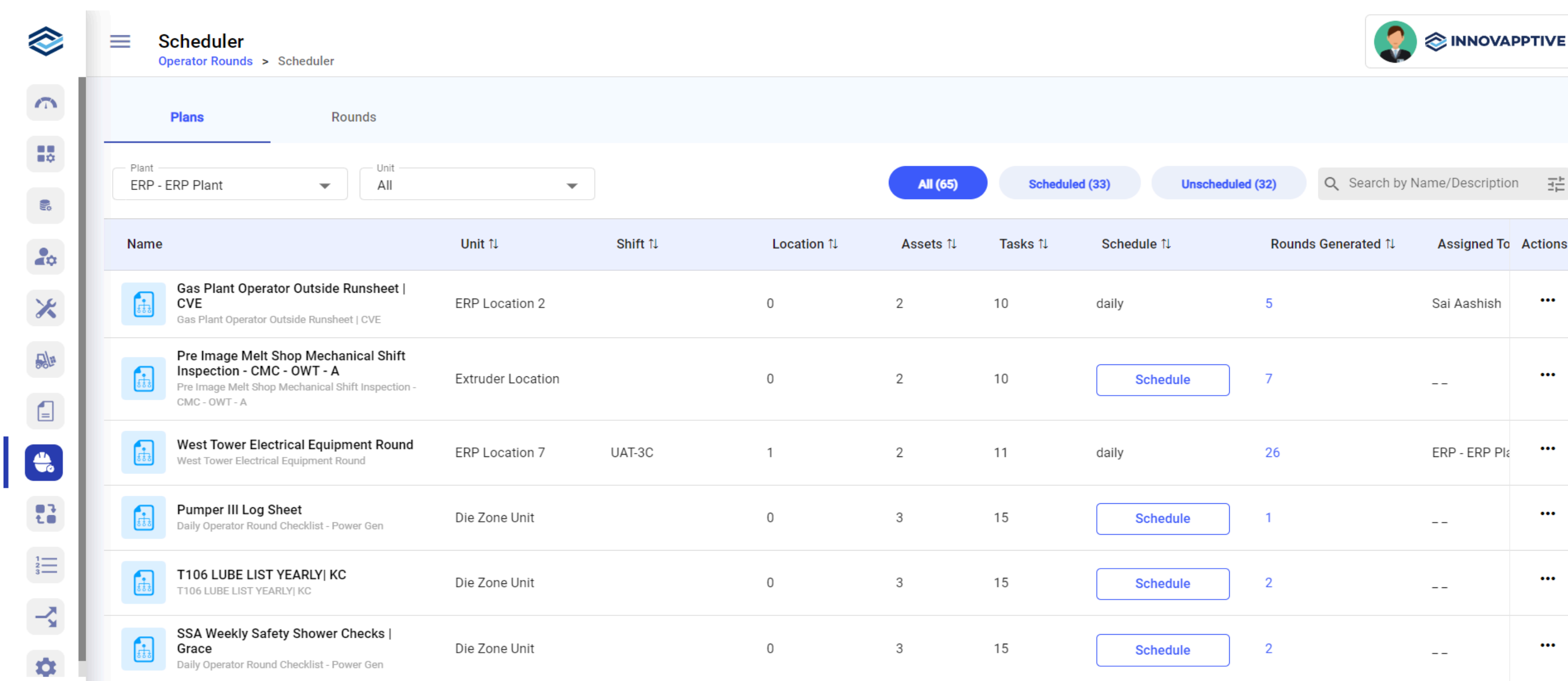
To schedule rounds by frequency:

1. Expand the **Operator Rounds** module and click **Scheduler** on the left-side pane.
2. In the **Plans** tab, click **Schedule** on the round plan and select **Header Level**.

   Or

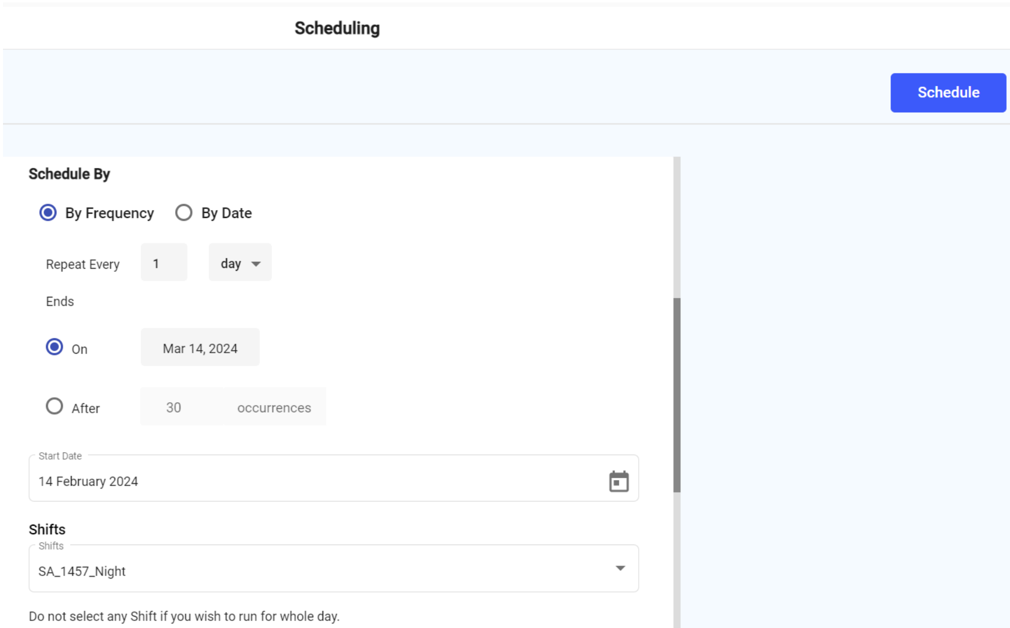
   Click the More icon and select **Schedule** > **Header Level** for the selected round plan that you want to schedule.

   Figure 3-54 Schedule Rounds Screen



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

Figure 3-55 Schedule Rounds by Frequency



4. Choose the frequency in the Repeats Every field.
5. Choose the <day>, <week> or <month>.
    a. If you choose 10 in Repeats Every field and choose <day>, the round is scheduled every 10 days.
    b. If you choose 2 and choose <week> or <month>, the round is scheduled every 2 weeks or every 2 months.

    Let's understand what happens when you choose the <month> option with an example. When you schedule rounds for specific day in a week like "Monday".

    - If a month starts on Thursday and you've scheduled a round for "Monday". That first partial week doesn't have a Monday. The system automatically schedules it for the first actual Monday of that month (in the first full week).
    - If a month ends on Sunday and you've scheduled a round for "Monday". That final partial week doesn't have a Monday. The system uses the last actual Monday from the previous full week.

    This automatic adjustment ensures your rounds maintain their intended schedule pattern without requiring manual fixes for these calendar edge cases.

6. Select when to end the inspection from **Ends On <Date>**, **Ends After <number> Occurrences**.
7. In the **Start Date** field, select the start date.

8. In the **Shifts** drop-down, select the relevant shift.

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

9. Select slots for the selected 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's 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 not match with the end and start times of either the slot or shift.

10. Select the **Allow Buffer Time** check box to add buffer time to the round execution time.
    a. Select and enter the buffer time to the planned start time.
    b. Select and enter the buffer time to the planned end time.

    For example, if the round shift is 8 hours and you specify a 30-minute buffer time, then the user can submit the round after the end time, i.e., 8:30 hours.

11. Enter the **Round Duration** time.
12. In the **Assigned To** field,

    Choose the **Plant** radio button to assign the scheduled round to a plant.

    Or

    Choose the **User** radio button to assign the scheduled round to an operator.

    Or

Choose the **Unit** radio button to assign the scheduled round to a unit or functional location.

Or

Choose the **Position** radio button to assign the scheduled round to a position.

Or

Choose the **User Group** radio button to assign the scheduled round to a user group and choose the option from the drop-down lists.

13. In the **Rounds Generation** drop-down, select the number of days you like to generate rounds at a time in advance.

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

14. Click **Schedule**.

A message "Round has been scheduled successfully" appears. Click **View Rounds** to see round details or click **Close** to close the pop-up.

3.2.4.2. Schedule Round Plans by Specific Date

Schedule a round plan at header level by date to execute on specific dates to ensure critical checks are done on time.

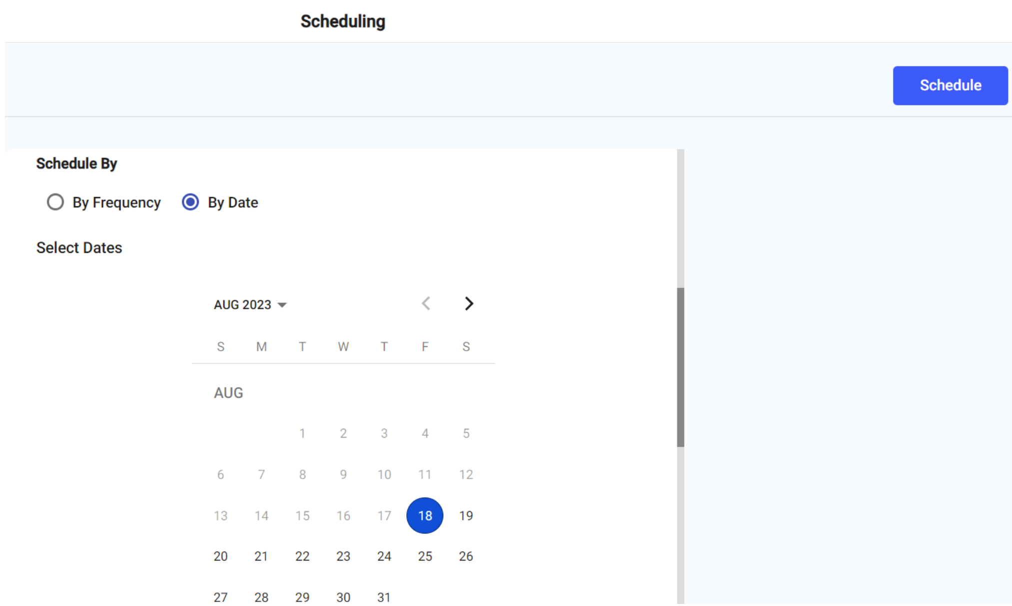
To schedule rounds by date:

1. Expand the **Operator Rounds** module and click **Scheduler** on the left-side pane.
2. In the **Plans** tab, click **Schedule** on the round plan and select **Header Level**.

   Or

   Click the More icon adjacent to the round plan that you want to schedule and select **Schedule** > **Header Level**.
3. In the **Scheduling** screen, choose the **By Date** radio button.

   Figure 3-56 Schedule Rounds 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. Select the **Allow Buffer Time** check box to add buffer time for round execution.
   a. Select and enter the buffer time to the planned start time.
   b. Select and enter the buffer time to the planned end time.

   For example, if the round shift is 8 hours and you specify a 30-minute buffer time, then the user can submit the round after the end time, i.e., 8:30 hours.
8. Enter the **Round Duration** time.
9. In the **Assigned To** field,

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

Or

Choose the **User** radio button to assign the scheduled round to an operator and select the name of the operator from the drop-down.

Or

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

Or

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

Or

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

10. In the **Rounds Generation** drop-down, select the number of days you like to generate rounds at a time in advance.
11. Click **Schedule**.

    A message "Round has been scheduled successfully" appears. Click **View Rounds** to see round details or click **Close** to close the pop-up.

3.2.4.3. Schedule Rounds at Task Level

Schedule Round Plans based on individual task frequencies. When certain tasks within a round need to run more frequently, use the task-level scheduling option.

For example, you want the Operators to 'Check Valve Pressure' daily, you can set frequency for the task instead of the entire 'Control Valve Maintenance' plan to run daily.

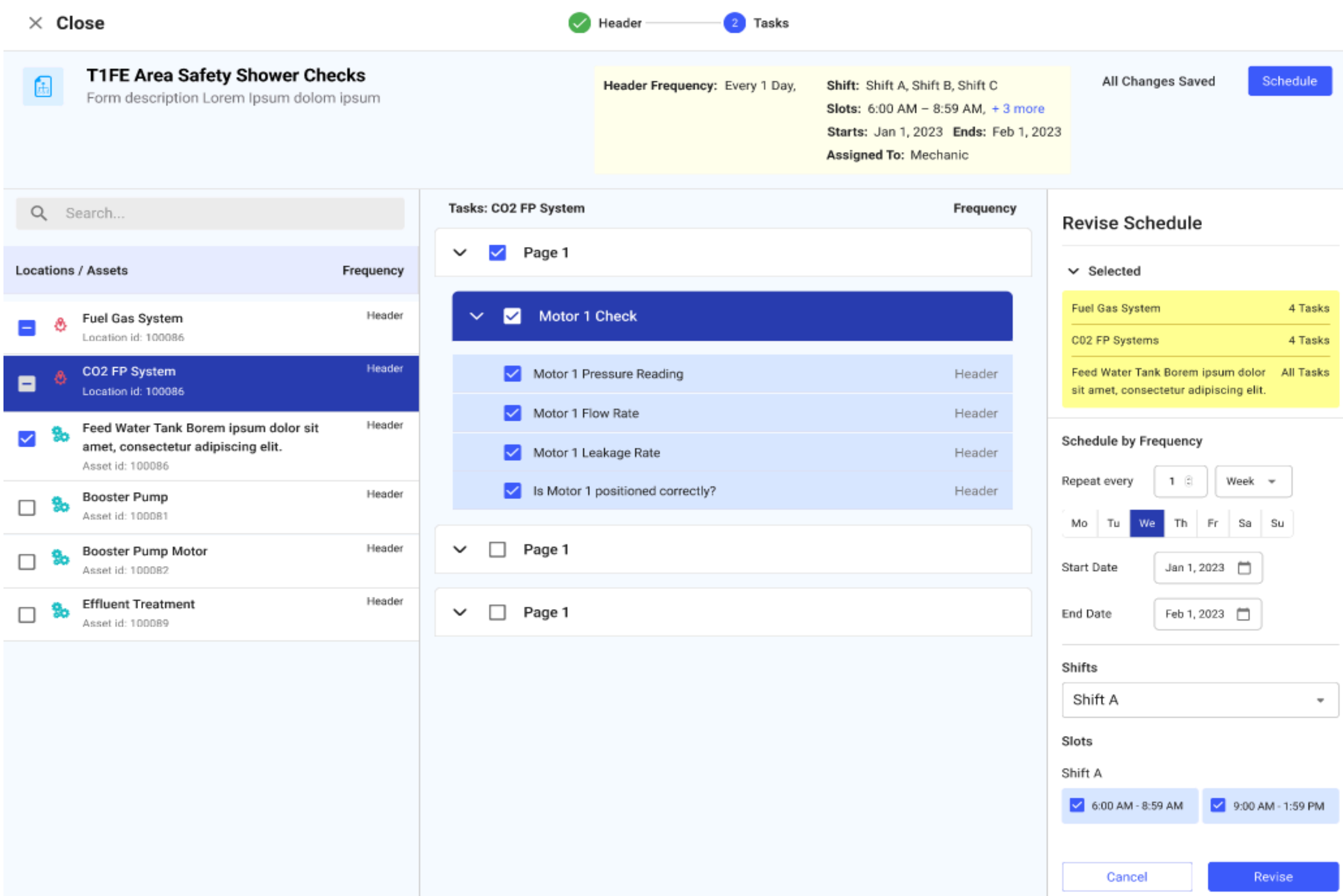
To schedule a round at task level:

1. Expand the **Operator Rounds** module and click **Scheduler** on the left-side pane.
2. In the **Plans** tab, click **Schedule** on the round plan and select **Task Level**.

   Or

   Click the More ••• icon adjacent to the round plan that you want to schedule and select **Schedule** > **Task Level**.
3. In the **Header** screen, fill the details. For more information, see Schedule Round Plans by Frequency *(on page 188)* and Schedule Round Plans by Specific Date *(on page 191)*.
4. Click **Next** on top right.
5. In the **Tasks** screen,
   a. Select the location or asset in the **Locations / Assets** section on the left side.
   b. Select the tasks or whole section in the middle section.
   c. Fill the details in the **Revise Schedule** section on the right side.
   d. Click **Revise**.

Figure 3-57 Scheduling at Task Level



A message "Schedule Revised Successfully" appears.

6. Click **Schedule** on top right.

   A message "Scheduled Successfully" appears and the selected tasks are scheduled.

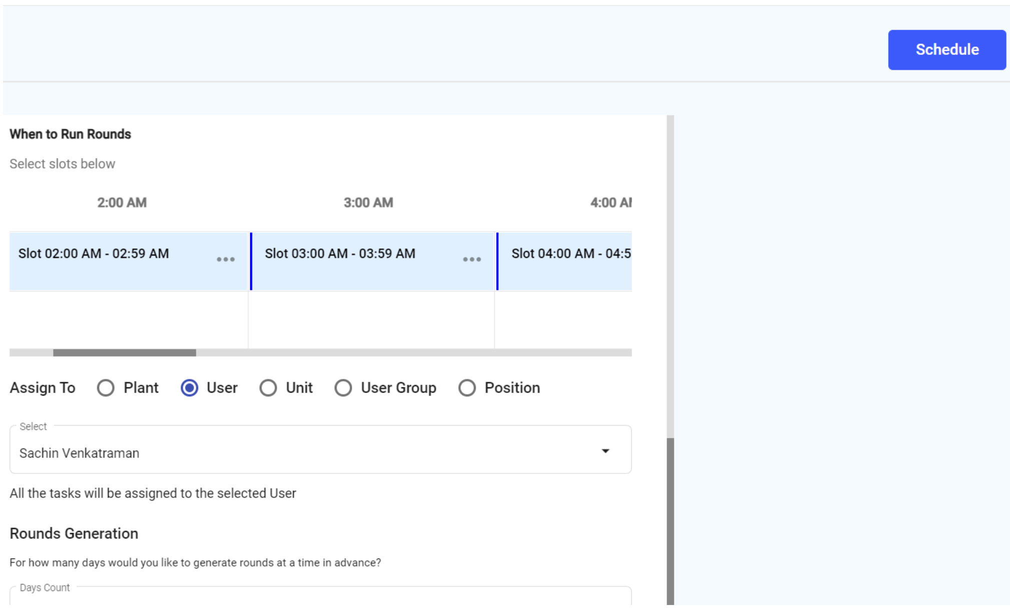
3.2.4.4. Modify Scheduled Round Plans

When an operation needs change, you may need to adjust existing round plan schedules to align with the updated requirements.

To modify the schedule of a round:

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

Figure 3-58 Modify Schedule



3.2.5. Create and Manage Round Templates

Creating round templates in mRounds helps supervisors and operators maintain standardized, reusable inspection or maintenance routines. By defining a round template, you can create consistent processes that can be applied across different assets, locations, and plants. These templates simplify the process of creating new round plans and ensure that any changes made to a template automatically reflect in all associated plans, reducing redundancy and human error.

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

Templates have the following status:

- **Draft**: The template is created, but it is not complete yet. You can edit and save the templates unlimited times till you publish them.
- **Ready**: The template is created and published, and it is ready to use to create a round plan.

3.2.5.1. Create a Round Plan Template

Create a round template with sections and tasks.

To create a round template:

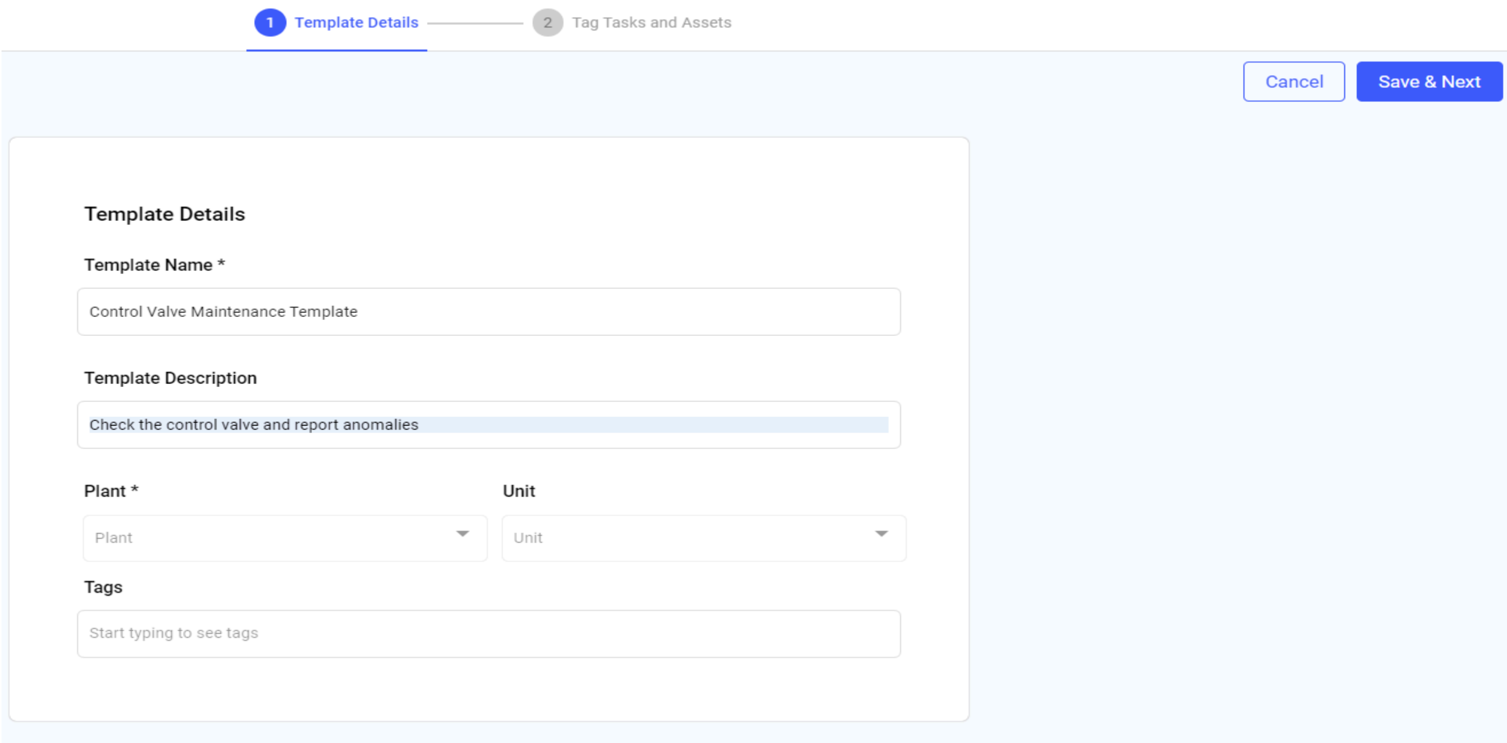
1. Expand **Operator Rounds** and select the **Templates** section on the left-side menu.

   The Templates screen with the list of round templates is displayed.
2. Click the **Create New** button on the right side.
3. In the **Template Details** screen, fill in the following details.

   Table 3-2 Fill Template Details

Field	Description
Template Name	Enter a name of the template. For example, Asset Maintenance Template.
Template Description	Add a short description about the template.
Plant	Select a relevant plant from the drop-down.
Unit	Select a relevant unit from the drop-down.
Tags	Add relevant tags.

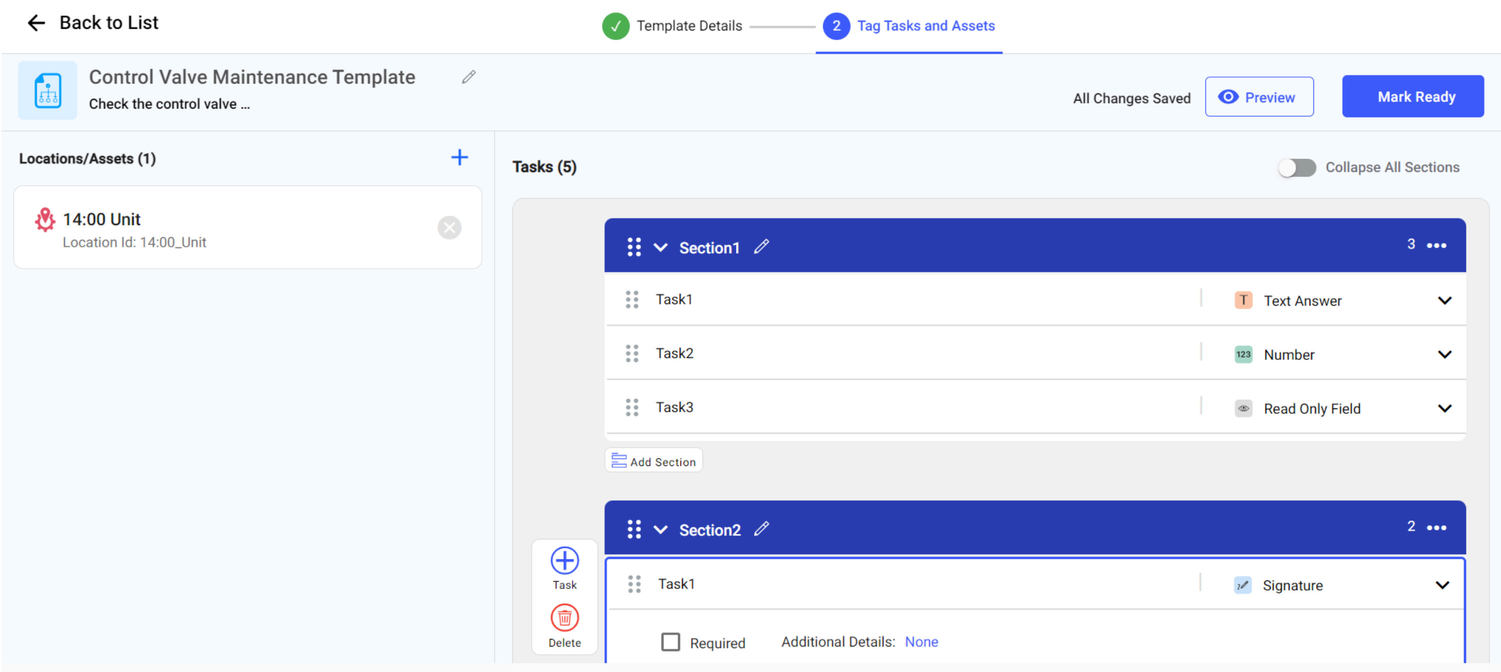
Figure 3-59 Templates Details Screen



4. Click the **Save & Next** button.
5. In the **Select Locations/Assets** window, select locations or assets and click **Add**.

   The selected location and assets hierarchy is displayed on the left side.

Figure 3-60 Tag Tasks and Assets Screen

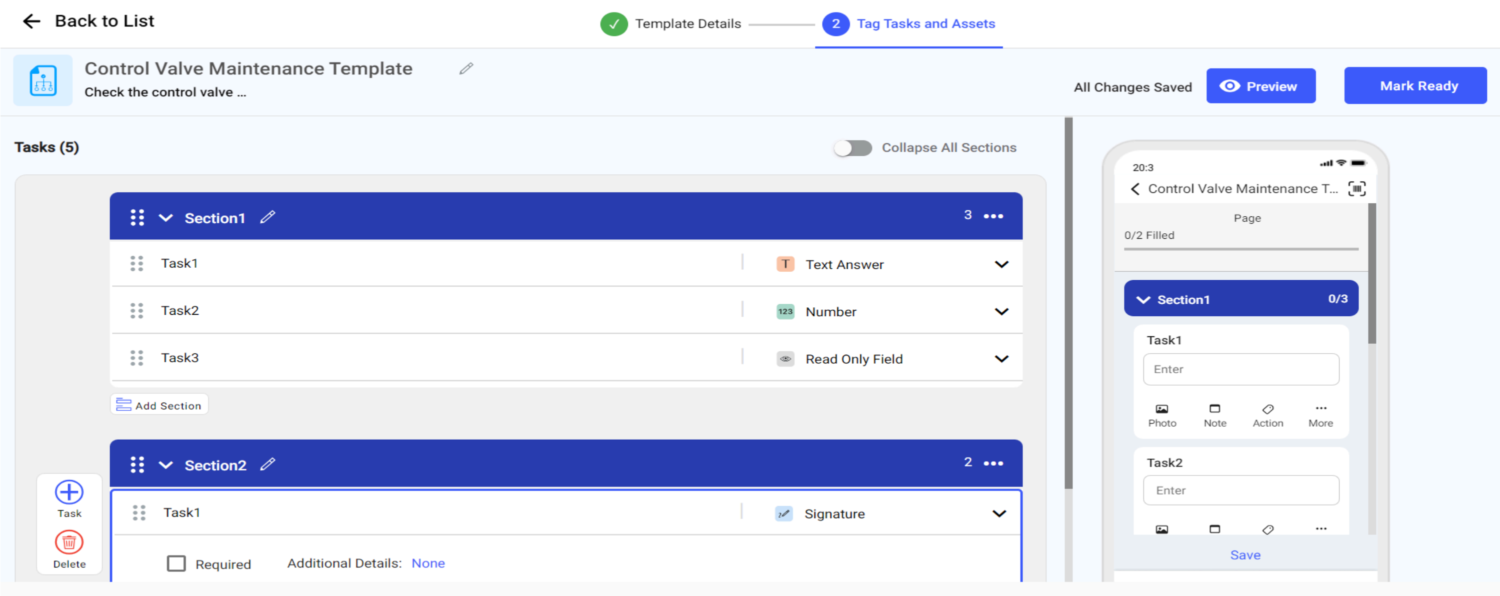


6. In the **Tag Tasks and Assets** screen, select the location or asset on the left side, add pages, multiple sections, and tasks with response types and conditional logic for the location or asset. For more information, see Create a Round Plan and Publish *(on page 166)*.

> **Note:**
> To add locations and assets from the left side pane, click the Add Locations/ Assets icon.

7. Click **Preview** to view the template preview.

Figure 3-61 Template Preview



8. Click **Mark Ready** to save the template.
9. In the **Round Plans that will reflect Template changes** window, select a round plan if the round is already created using the template to reflect the changes and click **Done**. The round template is created successfully and is displayed in the Templates screen with **Ready** status. If you leave the creation in the middle without submitting the template, then it is displayed with the **Draft** status.

3.2.5.2. Create Templates from Existing Templates

You can quickly create a new template by copying details from an existing template.

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 round templates is displayed.
2. Click the More ••• icon and select **Copy** for the round template that you want to copy.
   The template is copied 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.

3.2.5.3. Edit Round Templates

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

To edit a round template:

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

3.2.5.4. Archive Round Templates

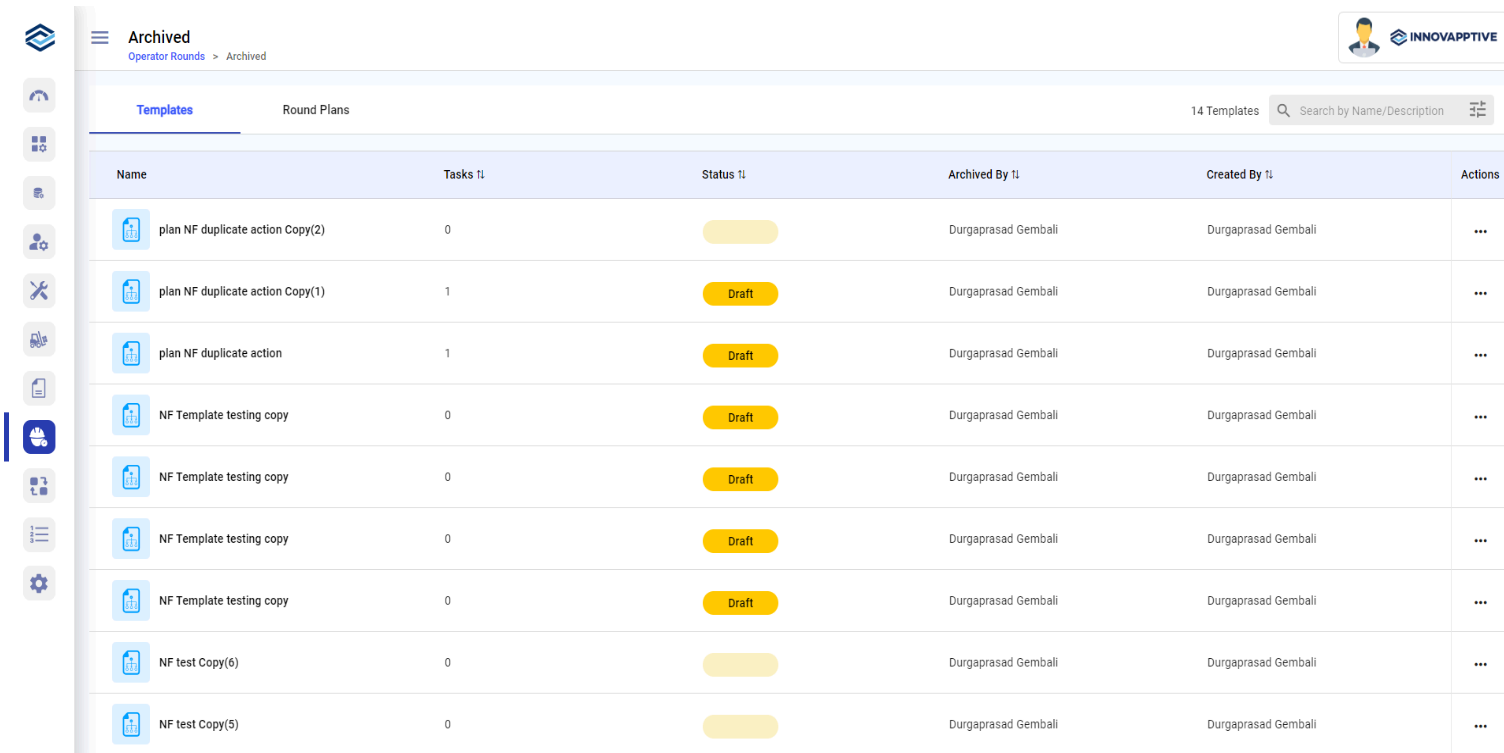
Archive round templates when they are no longer required for asset maintenance. You can also restore archived templates or delete them.

To archive a round template:

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

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

Figure 3-62 Archived Templates



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

3.3. View Round Plans and Submitted Rounds

View and manage round plans to monitor maintenance activities effectively. This feature allows you to track the completion status of rounds, identify issues flagged by operators, and ensure all tasks are completed as planned.

This topic contains the following sub topics,

- View Round Plans and Plan Details *(on page 203)*
- View Submitted Rounds *(on page 204)*

3.3.1. View Round Plans and Plan Details

The **View Round Plans and Plan Details** feature in mRounds allows supervisors to track and manage ongoing and completed round plans. By accessing the detailed view of each round plan, you can monitor task status, review operator performance, and address any raised issues. This helps ensure that critical maintenance tasks are completed on time and any problems are quickly identified and resolved.

For example, you can view the Control Valve Maintenance Round Plan to check which tasks have been completed, which are pending, and whether operators have encountered any issues during execution. This helps you maintain a clear overview of the health of your equipment and processes.

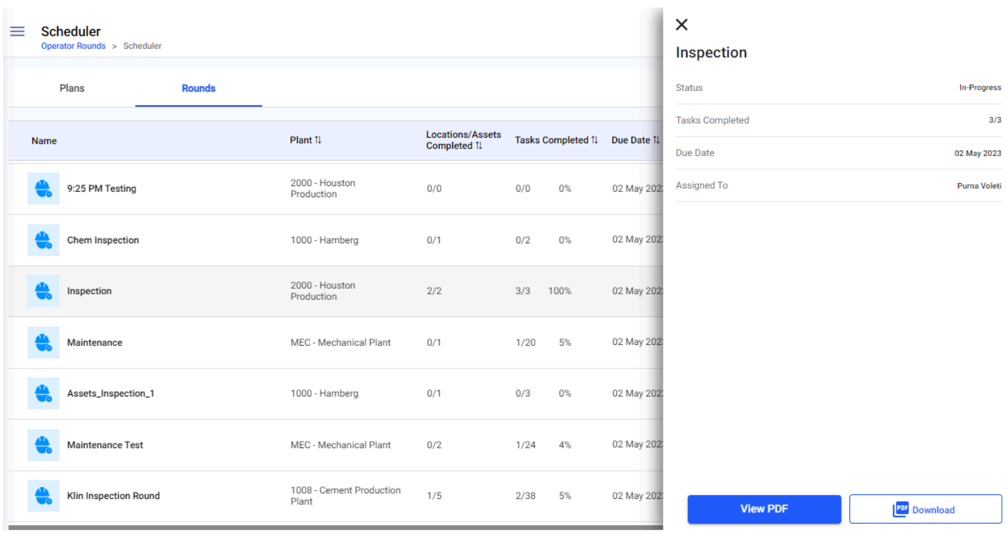
To view round plans list and round plan details:

1. Expand the **Operator Rounds** and click **Scheduler.**
2. Click the **Plans** tab.
   You can view the list of unscheduled and scheduled rounds.
3. Click the More ••• and select **Show Rounds** for the scheduled round to view.
   You can view the list of all scheduled rounds.

4. Click the More icon and select **Show Details** for the scheduled round to view. You can view the round 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 videos, audio, and documents. For more information, see Configure Round Plan Details PDF *(on page 181)*.

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

Figure 3-63 View Round Details



3.3.2. View Submitted Rounds

Round Planners or Supervisors can monitor the progress of rounds by viewing scheduled round plans.

Scheduled rounds have the following status:

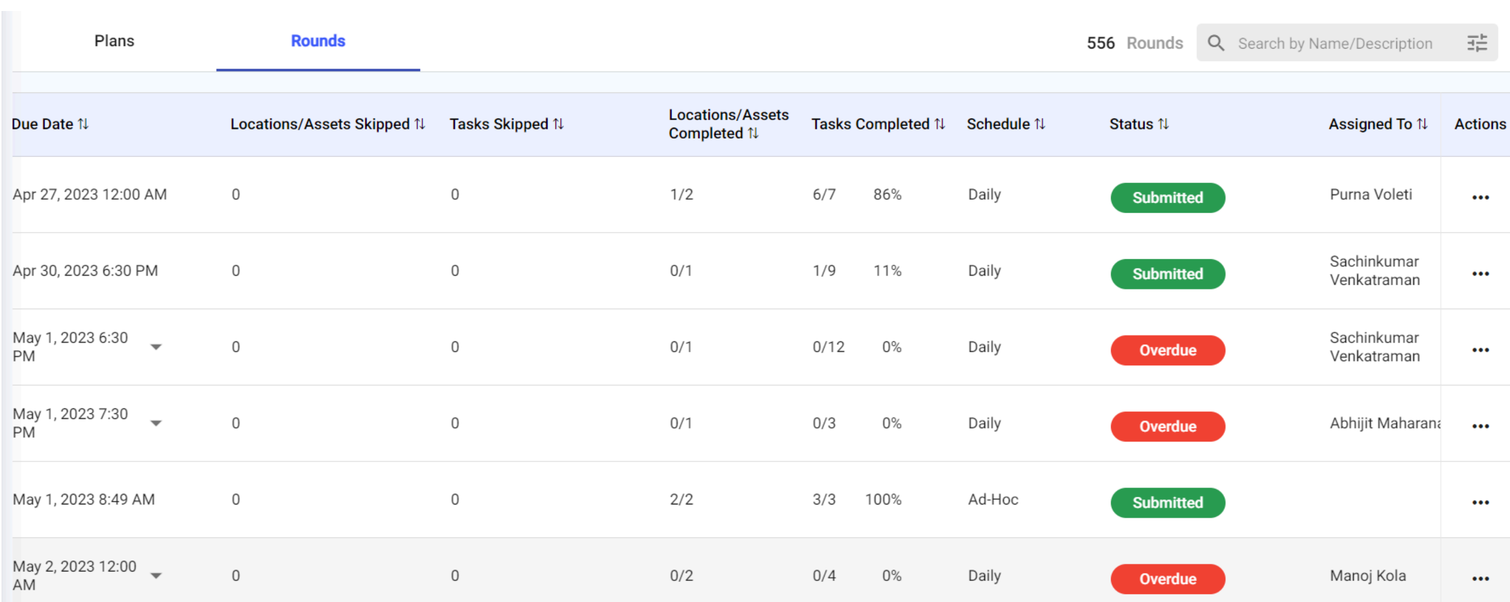
- **Open**: Round is scheduled but not assigned to an operator or round is assigned to the operator but the operator unassigned it without any progress.
- **Assigned**: Round is scheduled and assigned to an operator, but the Operator has not started the task yet.
- **In Progress**: Operator started the task.
- **Partly-Opened**: The round that is In Progress and later unassigned by the user.
- **Skipped**: Round is entirely skipped by the operator with a reason.
- **Submitted**: Operator completed tasks and submitted the round.
- **Overdue**: Round is not submitted before the due date and time.

To view the status of rounds:

1. Click the Hamburger menu on the top left of the screen.
2. Expand **Operator Rounds** and click **Scheduler**.
3. Click the **Rounds** tab.

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

Figure 3-64 Scheduled Rounds



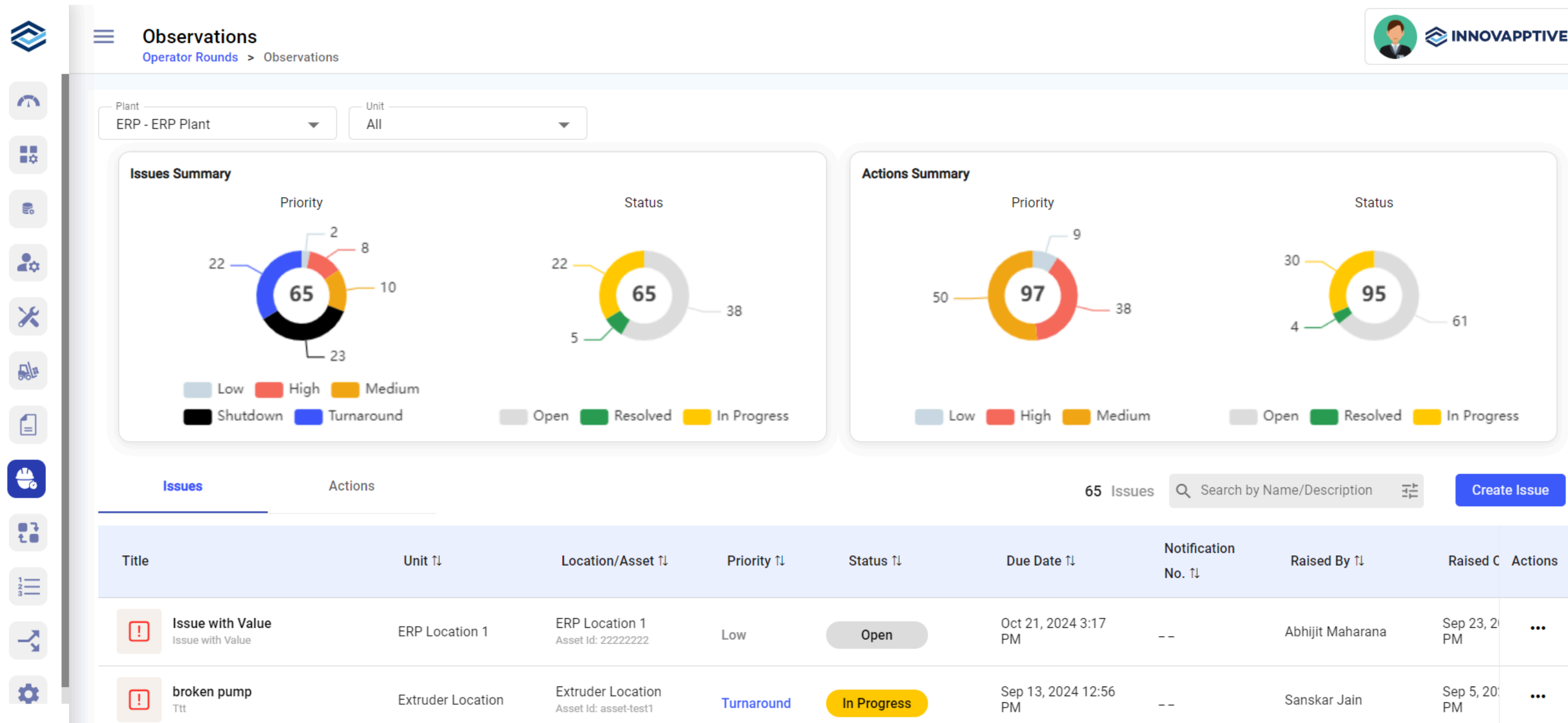
Due Date	Locations/Assets Skipped	Tasks Skipped	Locations/Assets Completed	Tasks Completed		Schedule	Status	Assigned To	Actions
Apr 27, 2023 12:00 AM	0	0	1/2	6/7	86%	Daily	Submitted	Purna Voleti	...
Apr 30, 2023 6:30 PM	0	0	0/1	1/9	11%	Daily	Submitted	Sachinkumar Venkatraman	...
May 1, 2023 6:30 PM	0	0	0/1	0/12	0%	Daily	Overdue	Sachinkumar Venkatraman	...
May 1, 2023 7:30 PM	0	0	0/1	0/3	0%	Daily	Overdue	Abhijit Maharana	...
May 1, 2023 8:49 AM	0	0	2/2	3/3	100%	Ad-Hoc	Submitted		...
May 2, 2023 12:00 AM	0	0	0/2	0/4	0%	Daily	Overdue	Manoj Kola	...

4. Select the round to view the summary on the right.
   You can view the round details on the left side. Click **View PDF** to view the details in PDF or click **Download** to download the details in PDF format

3.4. Create and Manage Issues

Effective issue management is vital for maintaining optimal equipment performance and minimizing downtime. Supervisors in mRounds can create new issues based on operator feedback, track the progress of ongoing issues, and ensure tasks are completed and closed after resolution. This topic will guide you through the entire process, from issue creation to closure.

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



3.4.1. Create an Issue

You can create an issue for an equipment malfunction during rounds from the web application, ensuring that tasks are efficiently delegated and tracked to completion.

For example, during a round, you notice that **Pump A** is malfunctioning and needs attention.

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 **Name** 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**, **Functional Location**, and **Asset** values from the respective dropdowns.
    g. In the **Assigned To** 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.
    h. Select **Start Date** and **Time**.
    i. Select **Due Date** and **Time**.
    j. Select the **Status** as **Open**, **In-Progress**, **Resolved**, or **Un Resolved**.
5. Enable **Convert to ERP Notification** toggle if you want to convert the issue to notification.
6. Click **Create**.

    The issue is created successfully. The supervisor and maintenance team receives notifications about the new issue.

3.4.2. Track Ongoing Issues

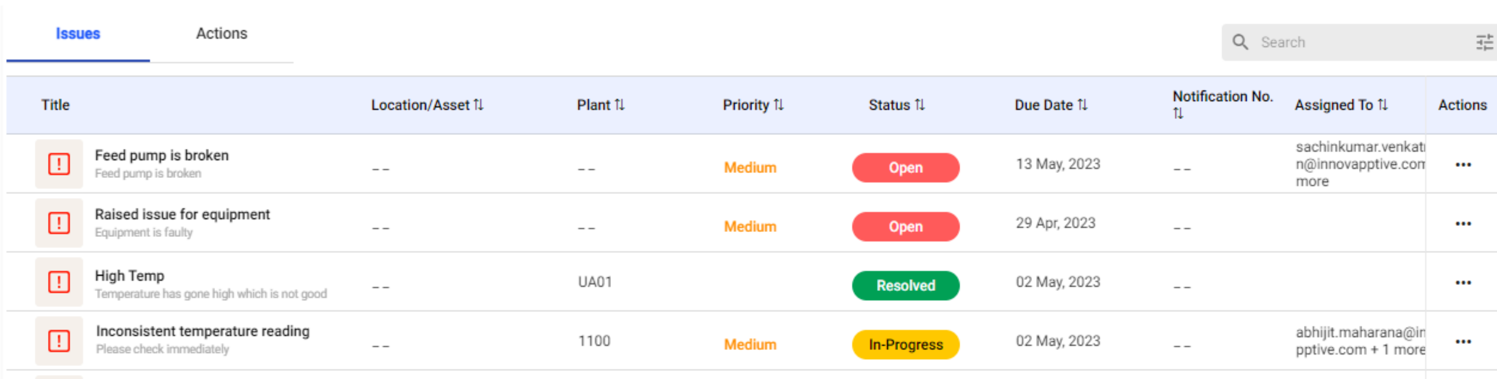
The Issues tab displays all the issues reported by the Operators during task execution. You can check the status of ongoing issues.

To track issues:

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

   You can view the list of issues.

   Figure 3-65 View Issues



   Sort issues by **Unit**, **Location/Asset**, **Plant**, **Priority**, **Status**, **Due Date**, **Notification No.**, and **Assigned To** to quickly navigate to an issue.

3. Click the More icon > **Show Details** of the selected issue.

   You can view the detailed information in the Log History screen such as live updates, priority, status, and so on.

   > **Note:**
   > Issue 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.

3.4.3. Update and Close an Issue

When the operator has resolved the issue, you can review and close the issue.

To update and close issues:

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

   You can view the list of issues.

3. Click the More icon > **Show Details** of the selected issue.

4. In the **Log History** screen, add any new insights from the operator's report.
5. Update the **Status** to **In Progress** based on current steps.

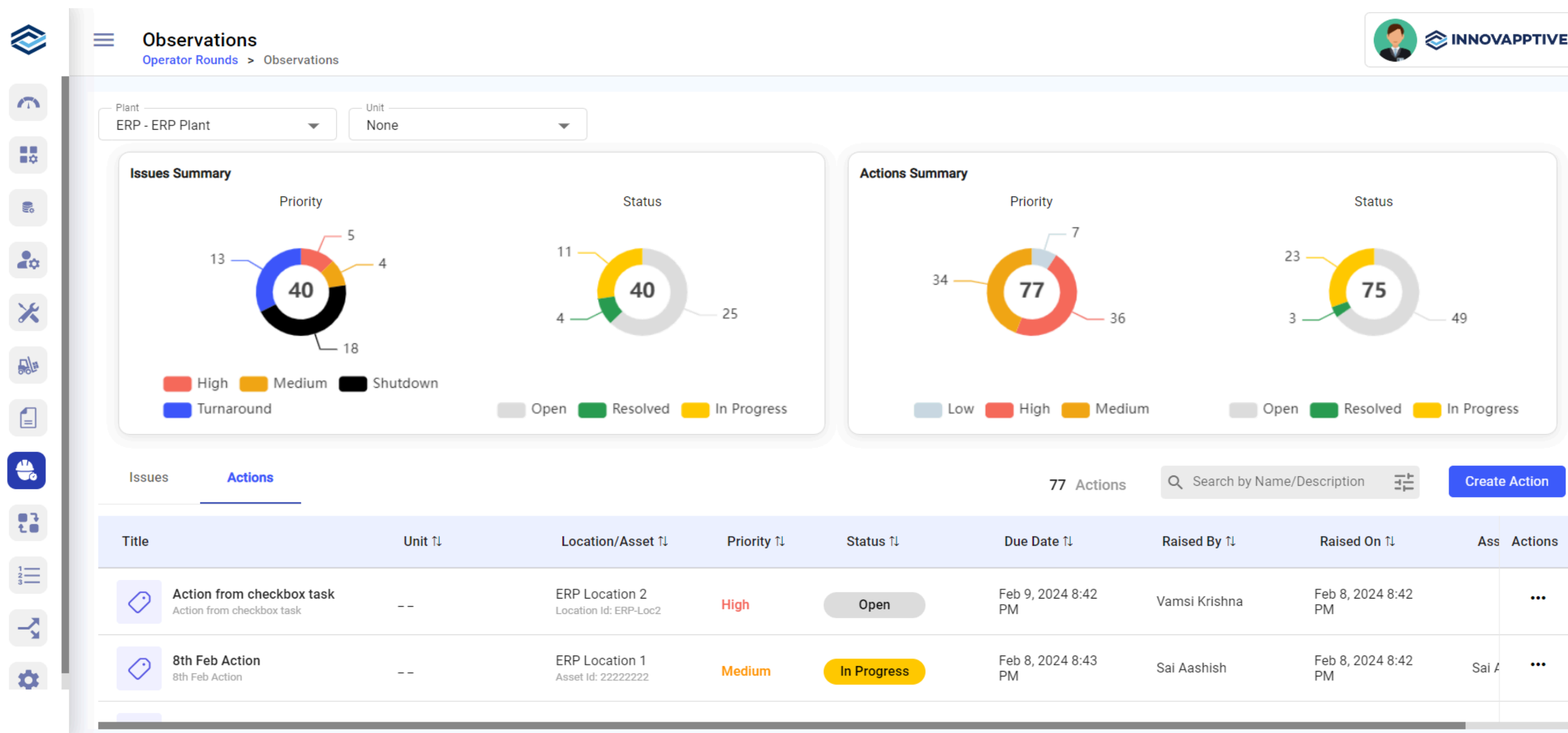
   Or

   Change the **Status** as **Resolved** to close the issue.

3.5. Create and Manage Actions

Creating actions helps you and operators address issues identified during inspections or rounds. These actions serve as follow-up tasks, ensuring critical issues receive prompt attention and are systematically tracked to resolution. This process aids in maintaining equipment performance and minimizing downtime, contributing to smoother operations.

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



3.5.1. Create an Action

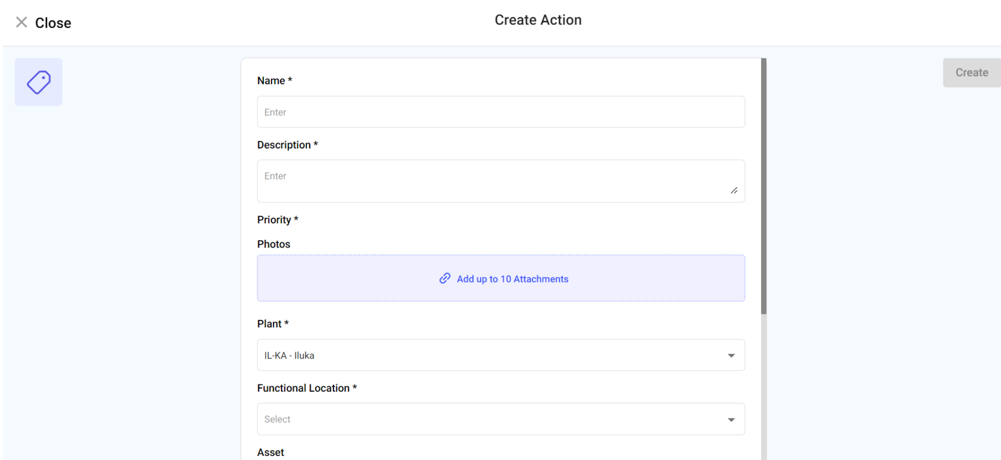
You can create actions to initiate follow-up tasks based on the results of a round or inspection from the web application.

Actions are designed to track issues that require further attention, such as repairs or maintenance activities. By creating actions, supervisors can ensure that critical problems are not overlooked and are followed up systematically

To create an action:

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

Figure 3-66 Create Action



4. In the **Create Action** screen, do the following,
   a. Enter the action title in the **Name** 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**, **Unit**, **Functional Location**, and **Asset** values from the respective dropdowns.
   f. In the **Assigned To** 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**, **Resolved**, or **Un Resolved**.

5. Click **Create**.

   The action is created and the assigned Operators receive a notification and see the task in their dashboard for completion.

3.5.2. Monitor Actions

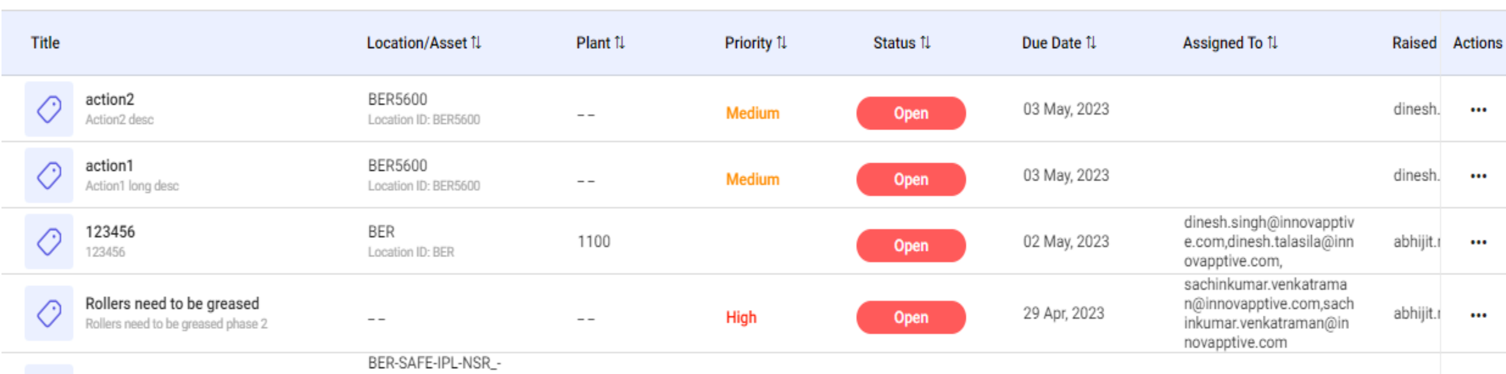
The Actions tab displays follow-up actions raised by the Operators.

To view open actions:

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

   You can view the list of actions.

Figure 3-67 View Actions



Title	Location/Asset	Plant	Priority	Status	Due Date	Assigned To	Raised	Actions
action2 Action2 desc	BER5600 Location ID: BER5600	--	Medium	Open	03 May, 2023		dinesh.	•••
action1 Action1 long desc	BER5600 Location ID: BER5600	--	Medium	Open	03 May, 2023		dinesh.	•••
123456 123456	BER Location ID: BER	1100		Open	02 May, 2023	dinesh.singh@innovapptive.com,dinesh.talasila@innovapptive.com,	abhijit.	•••
Rollers need to be greased Rollers need to be greased phase 2	--	--	High	Open	29 Apr, 2023	sachinkumar.venkatraman@innovapptive.com,sachinkumar.venkatraman@innovapptive.com	abhijit.	•••
test action	BER-SAFE-IPL-NSR_-							

Sort actions by **Unit**, **Location/Asset**, **Plant**, **Priority**, **Status**, **Due Date**, **Notification No.**, and **Assigned To** to quickly navigate to an action.

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

   You can view the detailed information in the **Log History** screen such as live updates, priority, status, and so on.

   > **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. Update and Close an Action

When an action is completed, review it and close it.

To close actions:

1. Click the **Observations** section on the left-side pane.
2. Click the **Actions** tab.
   You can view the list of actions.
3. Click the More ••• icon > **Show Details** of the selected action to see the details.
4. In the **Log History** screen, add any new insights from the operator's report.
5. Update the **Status** to **In Progress** based on current steps.

   Or

   Change the **Status** as **Resolved** to close the action.

3.6. Creating ERP Notification for an Asset

Create a notification for an equipment to escalate issues that require further action within the organization's enterprise resource planning (ERP) system while executing round tasks.

For example, while conducting maintenance checks, if you observe that the bearings in a pump are not working as expected, you can create an issue and convert it into a notification and then the notification number displays in the back-end ERP system.

To create a notification for an asset:

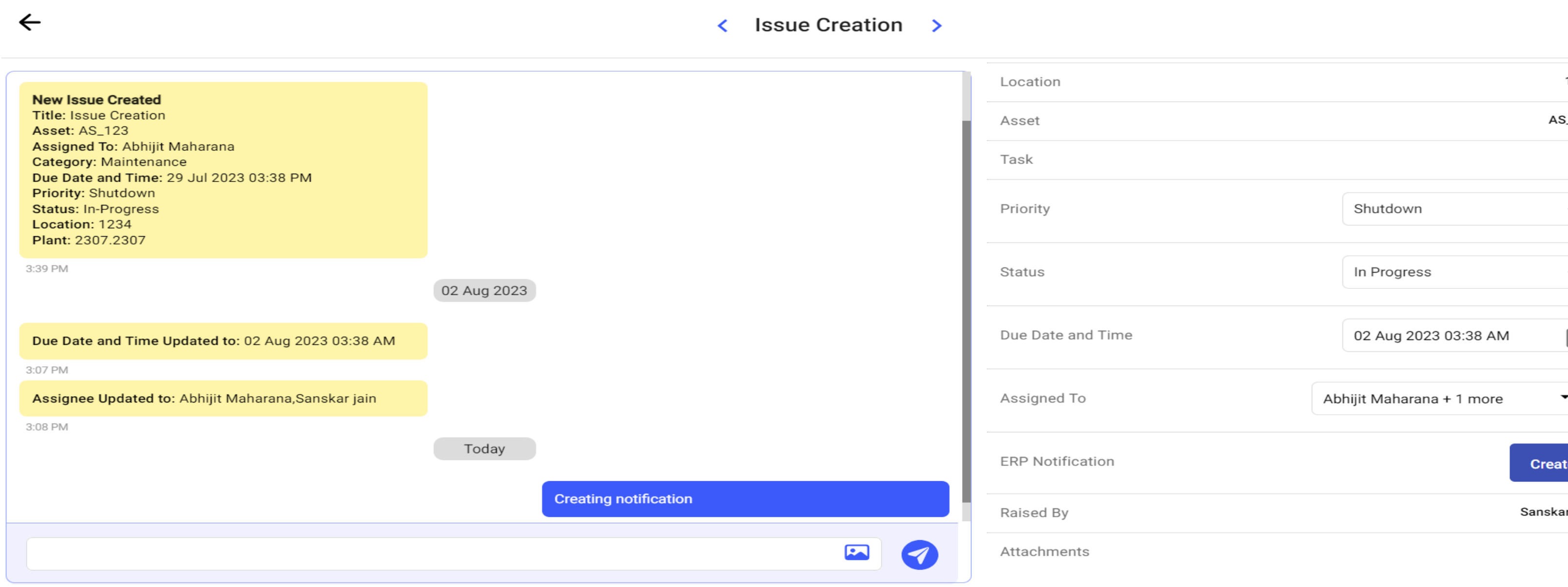
1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
3. Click the More icon > **Show Details** of the selected issue.

   or

   Double-click the issue to open.

   The log history window is displayed.

   Figure 3-68 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 back-end with the notification number.

3.7. Generate Shift Handover Report

This section provides guidance on generating, handing over, and accepting shift handover reports.

This section has the following topics:

3.7.1. Overview of Shift Handover Reports

The **Shift Handover Report** is a critical component that ensures smooth transitions between shifts. The Outgoing Shift Operators / Supervisor generates and hands over the shift handover report to the Incoming Shift Operator / Supervisor, summarizing the tasks completed, outstanding tasks, and any unresolved issues or anomalies. The Incoming Shift Supervisor reviews the handover report thoroughly to become aware of any urgent tasks or actions required during the shift.

The Shift Handover Report contains the following details:

- **Summary** displays the following sections:
  - **Trends** section displays the summary of **Rounds**, **Tasks**, **Issues**, and **Actions** in the form of widgets along with the Exceptions (if the defined range exceeds) and Notes and Logs. Click **View** next to the exception to view the last five readings.
  - **Instructions** section displays the **Supervisor Notes** and **Standing Instructions** for the Incoming Shift Supervisor along with the attachments like images and PDFs.
  - **Shift Information** section displays the shift details such as **Plant**, **Current Shift**, **Upcoming Shift**, **Unit**, **Shift Supervisor** (who handovers the shift details), and **Upcoming Shift Supervisor** (who accepts the shift details).
- **Logs** displays the shift logs added by the operator during the shift or task execution. You can view the list of operators who have created logs grouped by position and edit and delete the logs.
- **Rounds** displays the list of rounds that are part of the shift. You can filter the list using the All, Overdue, Submitted, Skipped, Open, In Progress and Completed options.
- **Observations** displays the list of exceptions, issues, and actions that are raised during the shift. Click **View** next to the exception to view the last five readings.
- **Notes** displays the notes added by the operator during the shift or task execution. You can edit and remove the notes.
- **Operators** displays the list of operators that are part of the shift along with the operator's name, position, submitted rounds count, user group name, and so on.

> **Note:**
> To configure shift handover report details to display or hide these details, click the More icon at the right-side in the Shift Handover screen, select **Handover Report Configuration** and select or deselect the options in the **Configure Shift Handover** window.

3.7.2. Generate and Handover Shift Handover Report

As an Outgoing Supervisor, create a comprehensive shift handover report with notes, observations, attachments, and any other important information and hand it over to the Incoming Supervisor during shift change.

To generate shift handover report:

1. Expand **Shift Handover** and click **Reports**.

   The **Reports** screen with the list of shift handover reports appears with Draft, Accepted, and Submitted status.

   In this screen you can,
   - View the reports for the last 24 hours, last week, or custom.
   - Filter the reports based on Plants, Unit, or Report Type.
   - Search the reports using the Search field.
   - Filter the reports based on Submitted By, Accepted By, Submitted On, or Accepted On.
   - Click the More icon next to the Search and select **Hanover Report Configuration** to configure the details to be displayed in the report.
   - Click the More icon next to the Search and select **Email Configuration** to configure the email. In the Email Configuration window, select **Unit** and **Recipients** and click **Configure Email**. The email with shift handover report automatically sends to the selected recipients.
   - Click the More icon > **Edit** to edit the report.
   - Click the More icon > **Download PDF** to download the report in PDF format.
   - Click the More icon > **View PDF** to view the report details.
   - Click the More icon > **Email PDF** to share the report via mail.
2. Select a shift from the list.

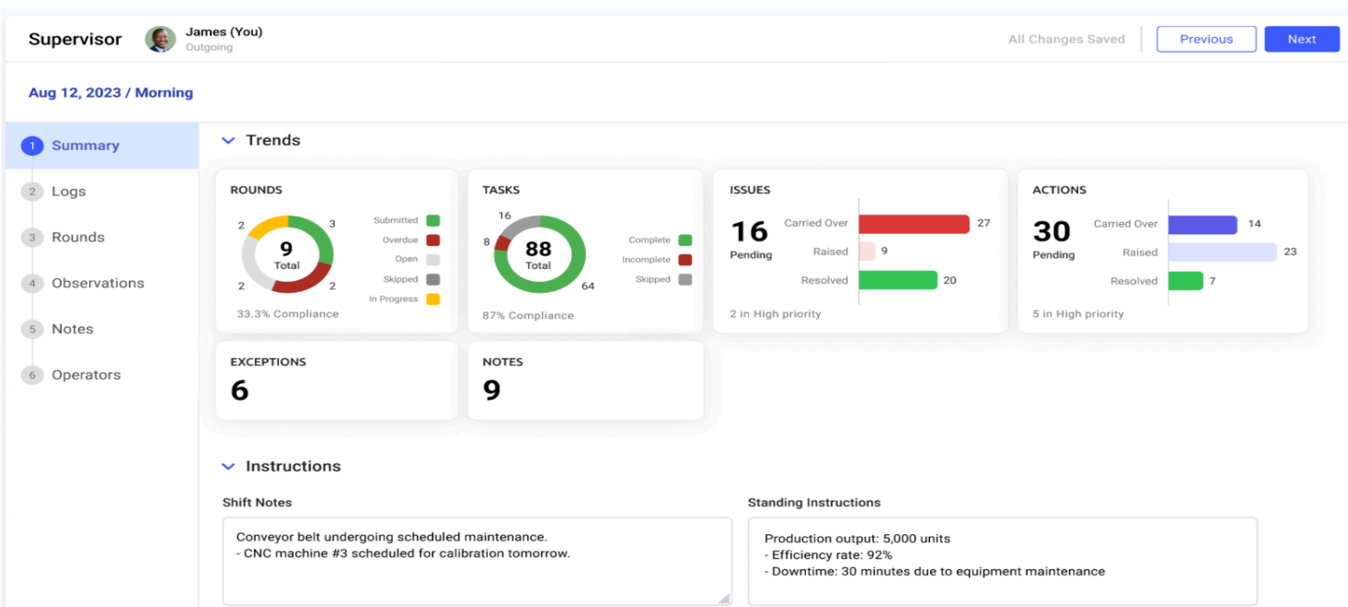
   The screen displays with the following tabs on the left-side:

- Summary
- Logs
- Rounds
- Observations
- Notes
- Operators.

For more information on the above tabs, see Overview of Shift Handover Reports *(on page 214)*.

3. In the **Summary** tab,
   a. Click **Start Handover** on top right.
   b. In the **Instructions** section, add **Shift Notes**, **Standing Instructions**, and **attachments**.
   c. Click **Next**.

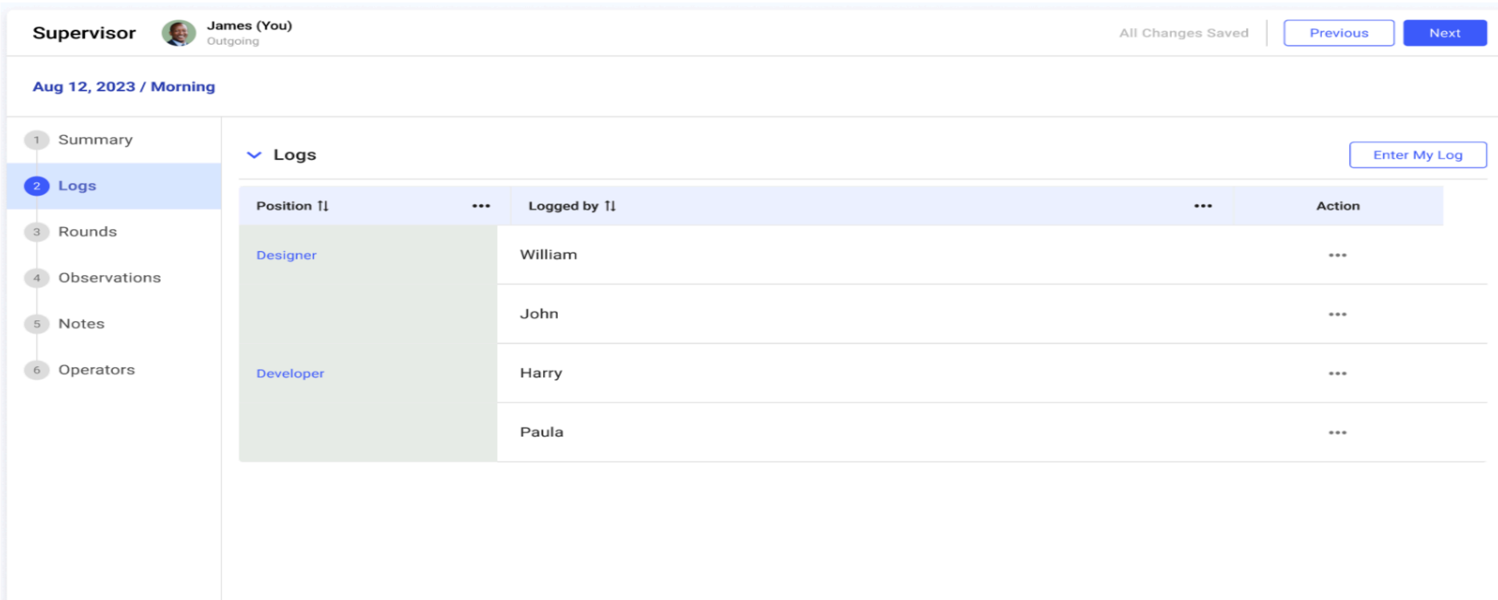
Figure 3-69 SHR Summary



4. In the **Logs** tab,
   a. Click **Enter My Log** on the right-side.

      The shift log template is displayed. For more information, see Create Shift Log Template *(on page 220)*.
   b. Fill the log details in the template.
   c. Click **Add Custom Log**, to add custom logs.
   d. Click **Save**.
   e. The log is saved.

Figure 3-70 SHR Logs

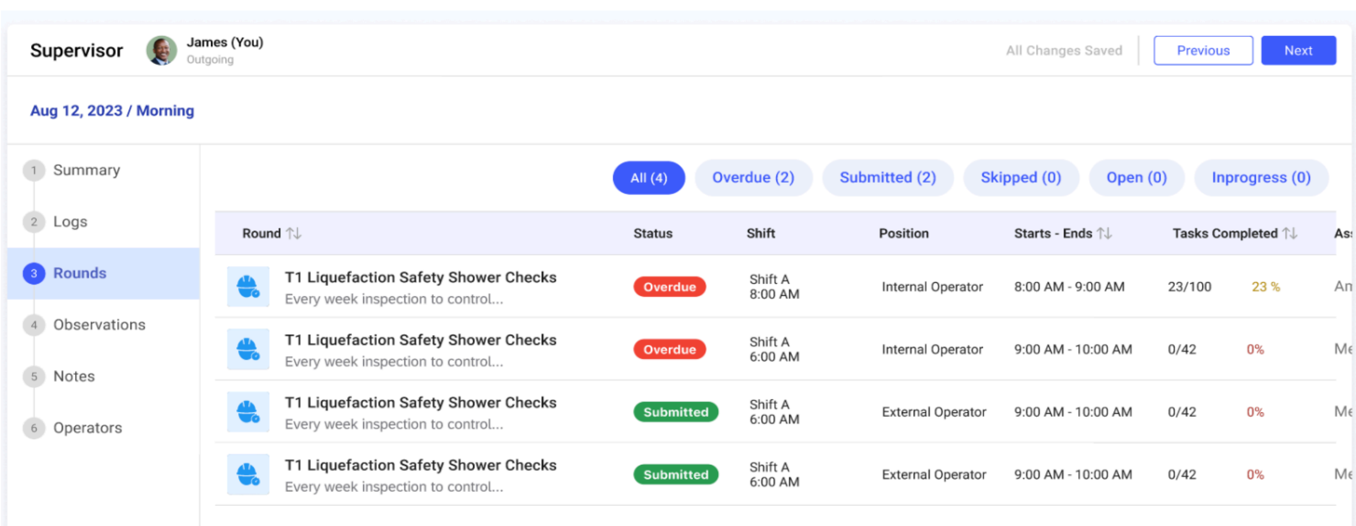


Note:

- Click on individual positions to view the logs entered by different operators who belong to that position for the Unit in that shift.
- Click More icon > select **Edit** next to the log to edit the log.
- Click More icon > select **Delete** next to the log to delete the log.

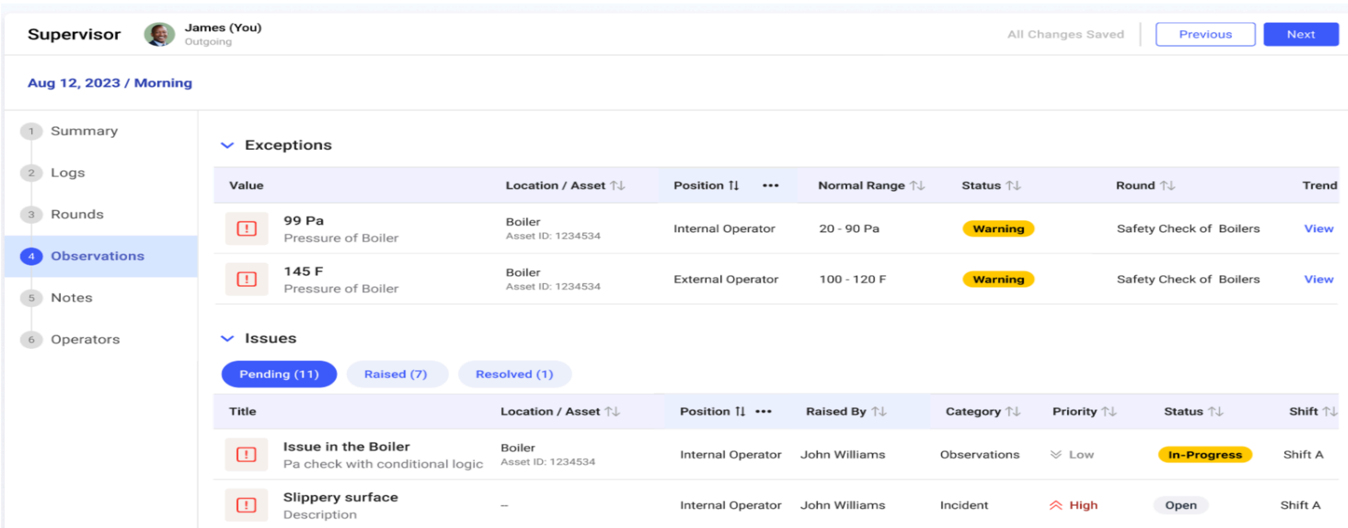
5. In the **Rounds** tab, view the progress of rounds and click **Next** on top right.

Figure 3-71 SHR Rounds



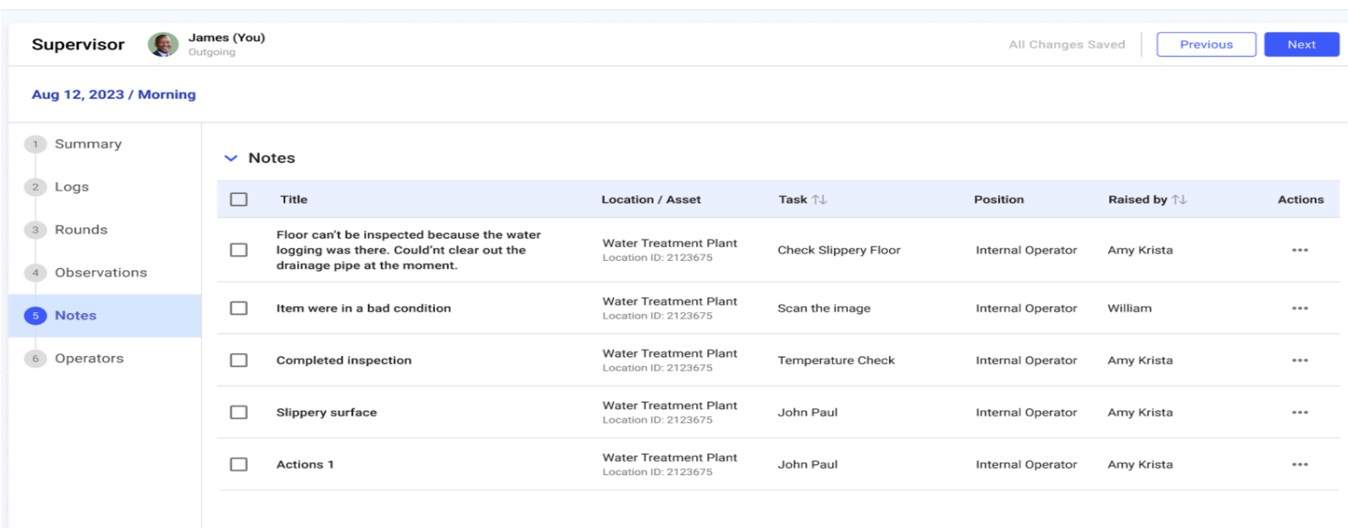
6. In the **Observations** tab, check unresolved issues, exceptions, issues, and actions details and click **Next**.

Figure 3-72 SHR Observations



7. In the **Notes** tab, review the notes added for the round during the shift and click **Next**.

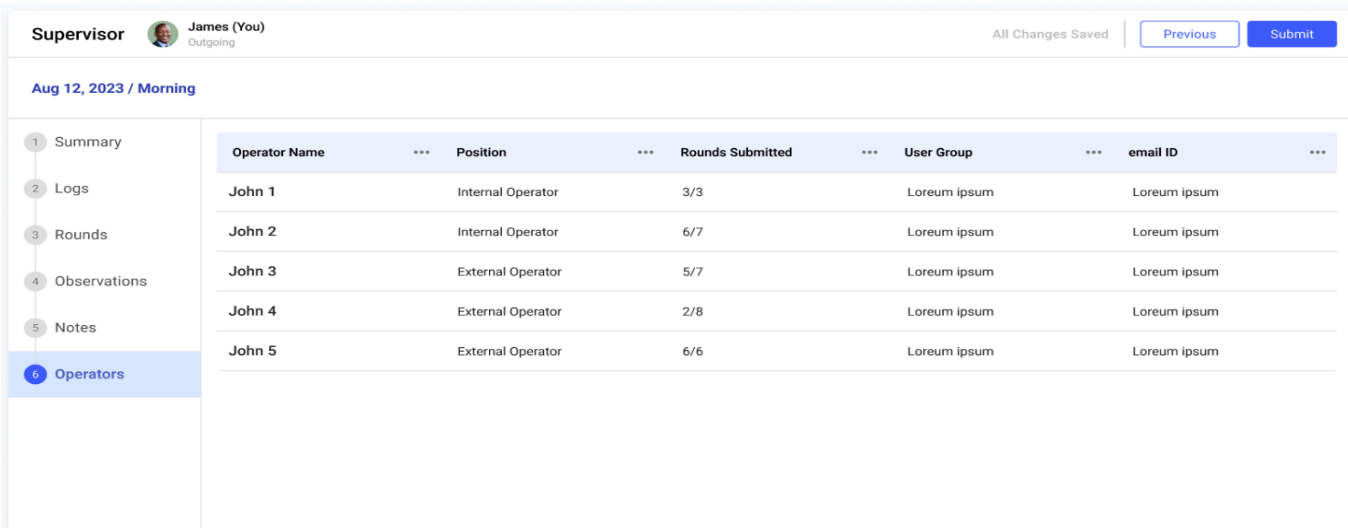
Figure 3-73 SHR Notes



Note:
You can edit and select required notes and logs and remove, which is not required.

8. In the **Operators** tab, view the Operators along with the rounds submitted status and click **Submit** on top right.

Figure 3-74 SHR Operators



9. In the **Confirm Submission** window, review the shift handover details and click **Submit**.

   A message “Submitted and Email sent” is displayed. The Shift Status is changed to Completed, and the Handover Status is changed to Submitted in the Shift Handover screen.

   > **Note:**
   > If the Outgoing Supervisor does not submit the report at the end of the shift, then the system automatically submits the report, and the status is changed to Auto-Submitted.

10. In the Shift Handover screen, when the shift handover report is submitted, download and share it with stakeholders for further review and communication.
    a. Click the **More** icon next to the report and select **View PDF** to see the report details.
    b. Click the **More** icon next to the report and select **Download PDF** to save the report details in PDF format.
    c. Click the **More** icon next to the report and select **Email PDF**. Add the recipient’s email addresses and click **Send** to share the report via email.

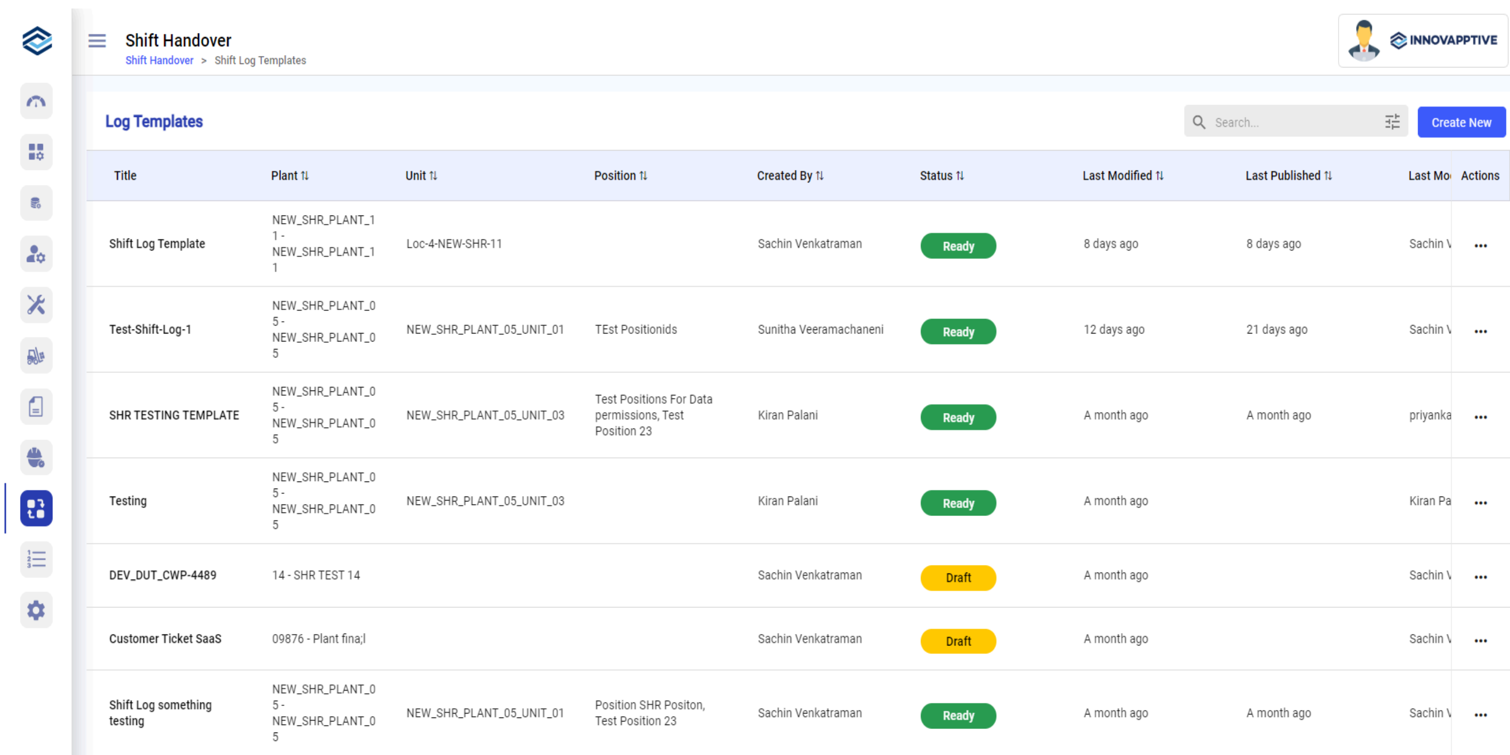
3.7.3. Create Shift Log Template

Create shift log templates for different plants, units, and positions combinations with multiple sections, tasks, and response types. Any modifications made to the template are automatically reflected in the shift handover reports, which are using the template.

To create a shift log template:

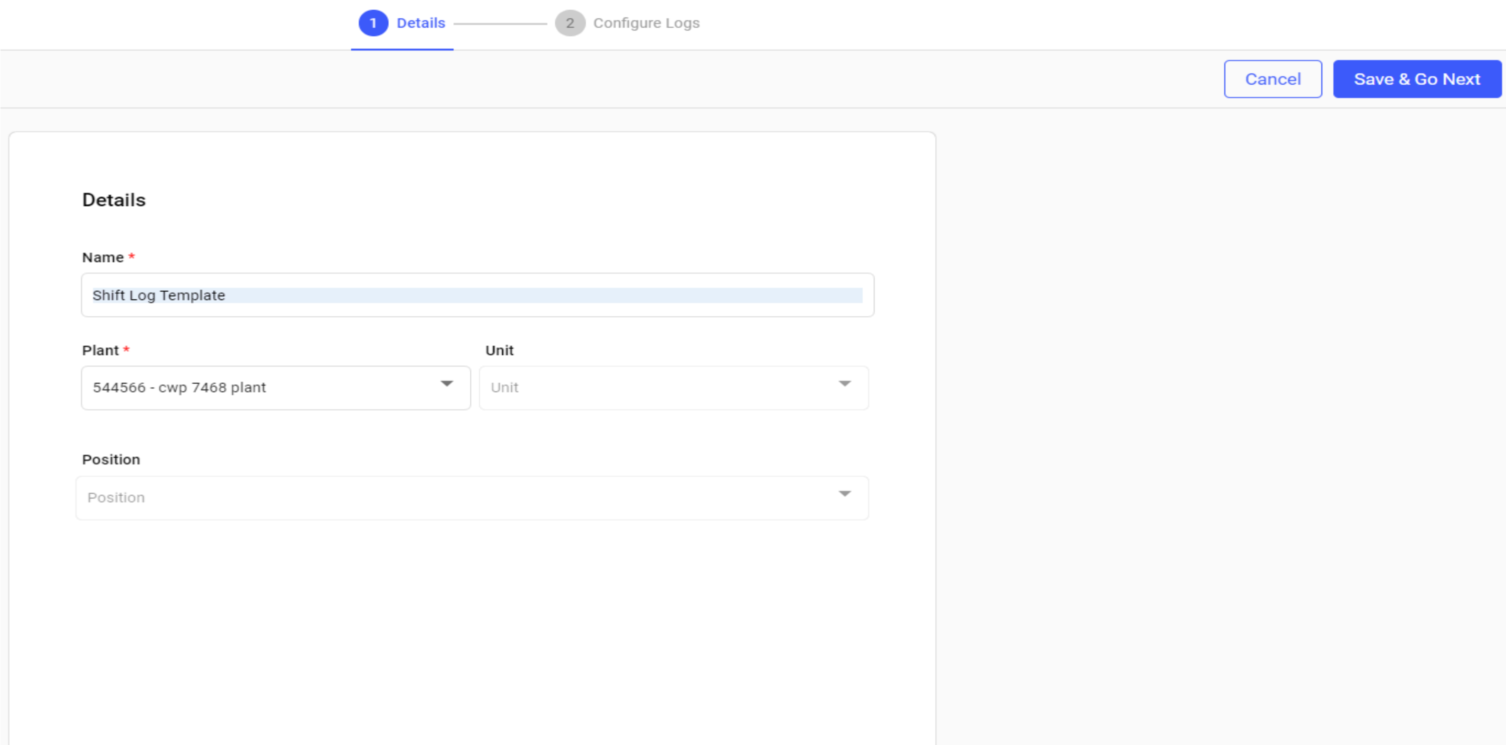
1. Expand **Shift Handover** and click **Shift Log Templates**.
   List of shift log templates are displayed in the Log Templates screen.

Figure 3-75 Log Templates Screen



2. Click **Create New** on the right side.
3. In the **Details** screen,
   a. Enter the name of the template in the **Name** field.
   b. Select the plant from the **Plant** drop-down.
   c. Select the unit from the **Unit** drop-down.
   d. Select the position from the **Position** drop-down.
   e. Click **Save & Go Next**.

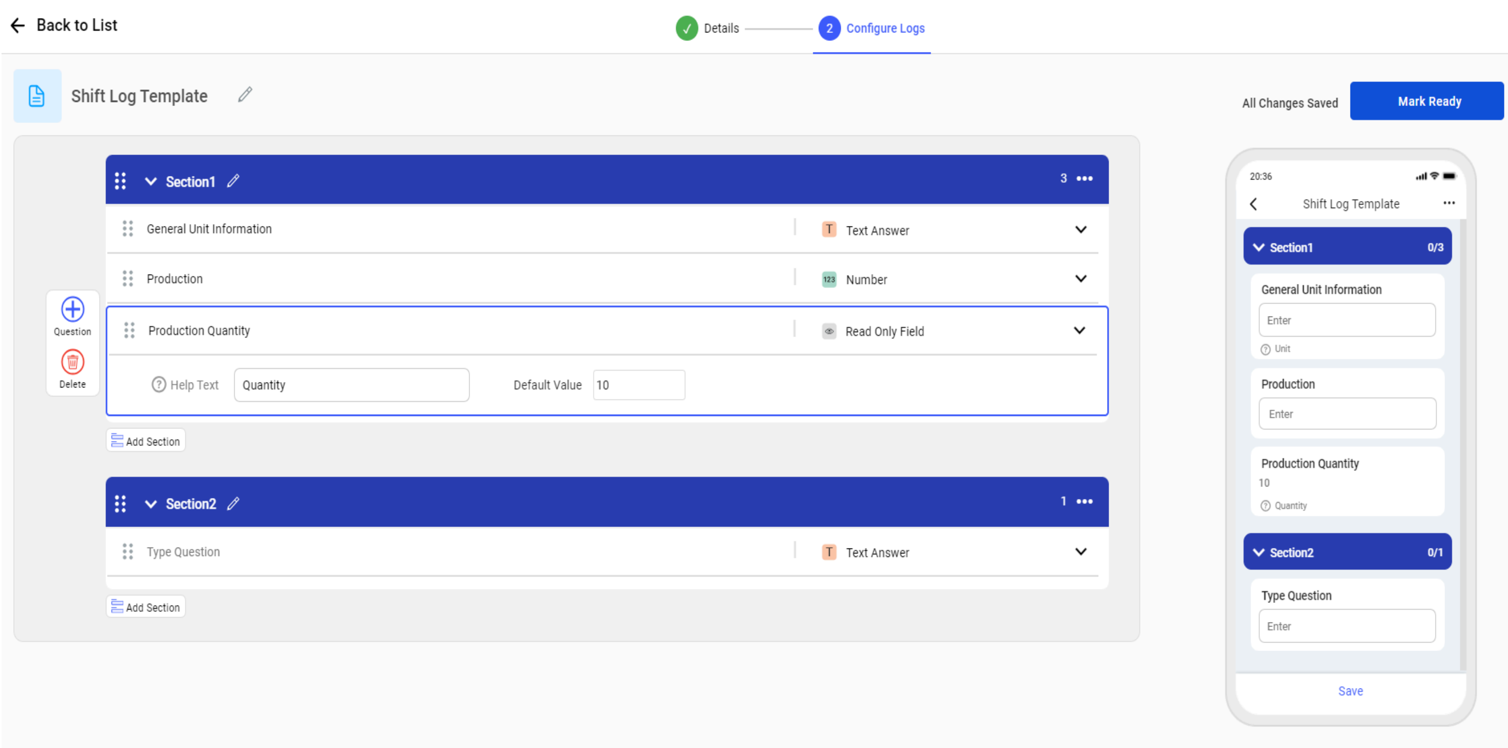
Figure 3-76 Details Screen



4. In the **Configure Logs** screen,
    a. Add tasks inside the sections.
    b. Add response types for the tasks.
    c. Add helper text like instructions to the operator.

You can view the mobile preview of the shift log on the right-side.

Figure 3-77 Configure Logs Screen



5. Click **Mark Ready**.

   The shift log template is created successfully and you can view it in the Log Templates screen with Ready status.

   Click More icon > select **Edit** next to the template to edit the template.

   Click More icon > select **Delete** next to the template to delete the template.

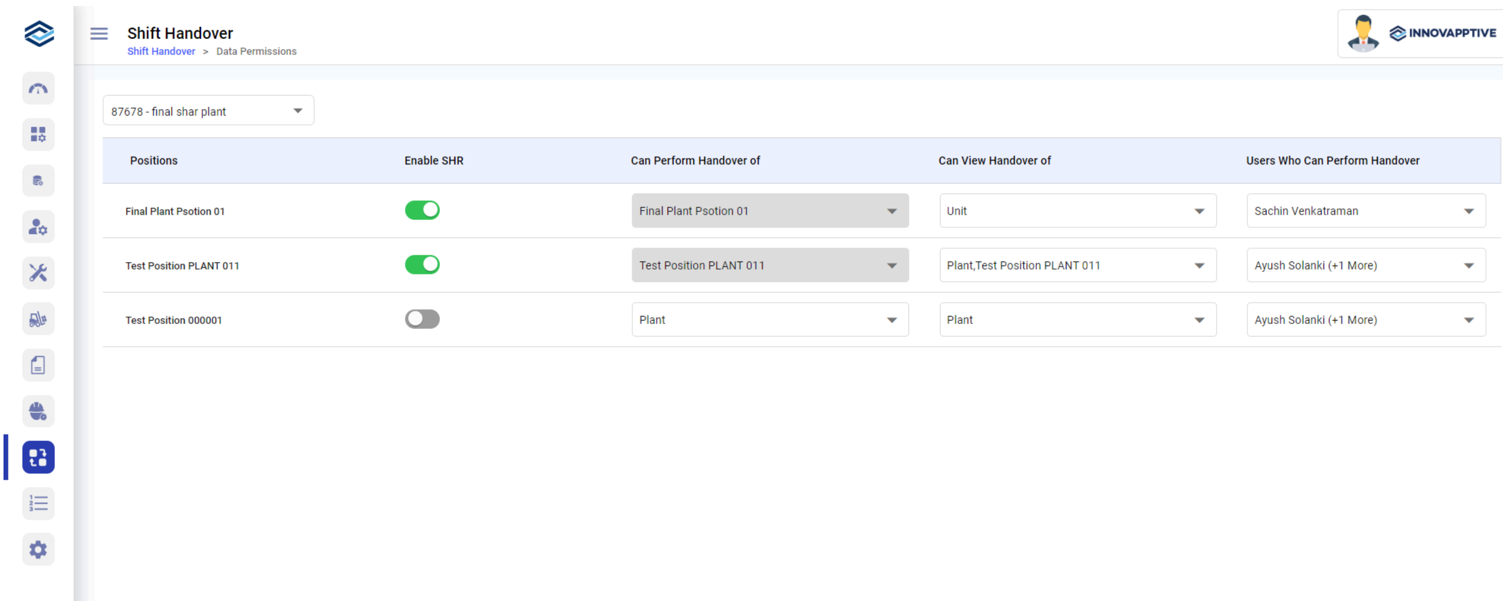
3.7.4. Manage Shift Handover Authorization

Control the shift handover templates authorization through Data Permissions for a specified plant that helps reduce cognitive load, enhance user experience, and optimize operational efficiency.

To control shift handover template permissions:

1. Expand **Shift Handover** and click **Data Permissions**.
2. Select the plant from the **Plant** drop-down.
3. Switch ON the **Enable SHR** toggle button for a selected Position to enable the permission to enter the log details while generating a shift handover report.
4. Select a plant, unit, or position from the **Can Perform Handover** of drop-down.
5. Select a plant, unit, or position from the **Can View Handover** of drop-down.
6. Select a user from the **Users Who Can Perform Handover** drop-down.

Figure 3-78 Shift Handover Data Permissions



3.7.5. Email Configuration for Shift Handover Reports

The Email Configuration feature automatically sends shift handover reports in PDF format to designated recipients based on organizational hierarchy levels. You can configure distribution lists at the Plant level, Unit level, and Position level, with the flexibility to send to either user groups or individual users.

Configuration Steps

Accessing Email Configuration

1. Navigate to **Shift Handover** > **Reports**.
2. Click the Menu icon.
3. Select **Email Configuration**.

Setting Up Distribution Levels

1. Select the organizational levels for report distribution:
    - Plant (required)
    - Unit (optional)
    - Position (optional).

Configuring Recipients

1. Click the "Recipient" drop-down.
2. Choose between:
    - User Group: Select predefined groups of users.
    - Users: Select individual users.
3. Your selected configuration will appear in the Email Configuration section on the left.

Finalizing Configuration

1. Review your selections in the Email Configuration section.
2. Click "Configure Email" to save your settings

How It Works

- When a shift handover is completed, the system automatically generates a PDF report.
- The report is distributed according to your configured hierarchy levels.
- Recipients receive the report based on their assigned Plant/Unit/Position combination.
- All configured users or user groups receive the relevant reports for their assigned levels.

Best Practices

- Start with broader Plant-level distribution and narrow down as needed.
- Use User Groups for teams that regularly need the same reports.
- Review and update configurations periodically to ensure appropriate distribution.
- Consider organizational hierarchy when setting up multiple distribution levels.

> **Note:**
> The system will only send reports to recipients who have been properly configured at their respective organizational levels. Ensure all intended recipients are correctly mapped to their Plant, Unit, or Position as applicable.

3.8. Locate Rounds, Issues, and Actions

In fast-paced operations, efficiently locating and managing rounds, issues, and actions is crucial for maintaining workflows and accountability. mRounds offers powerful Search and Filter tools that help Operators and Supervisors quickly find relevant rounds, issues, or actions based on various criteria. These criteria can include status, priority, date, or assigned personnel.

This section contains the following:

3.8.1. Search for a Round, Issue, or Action

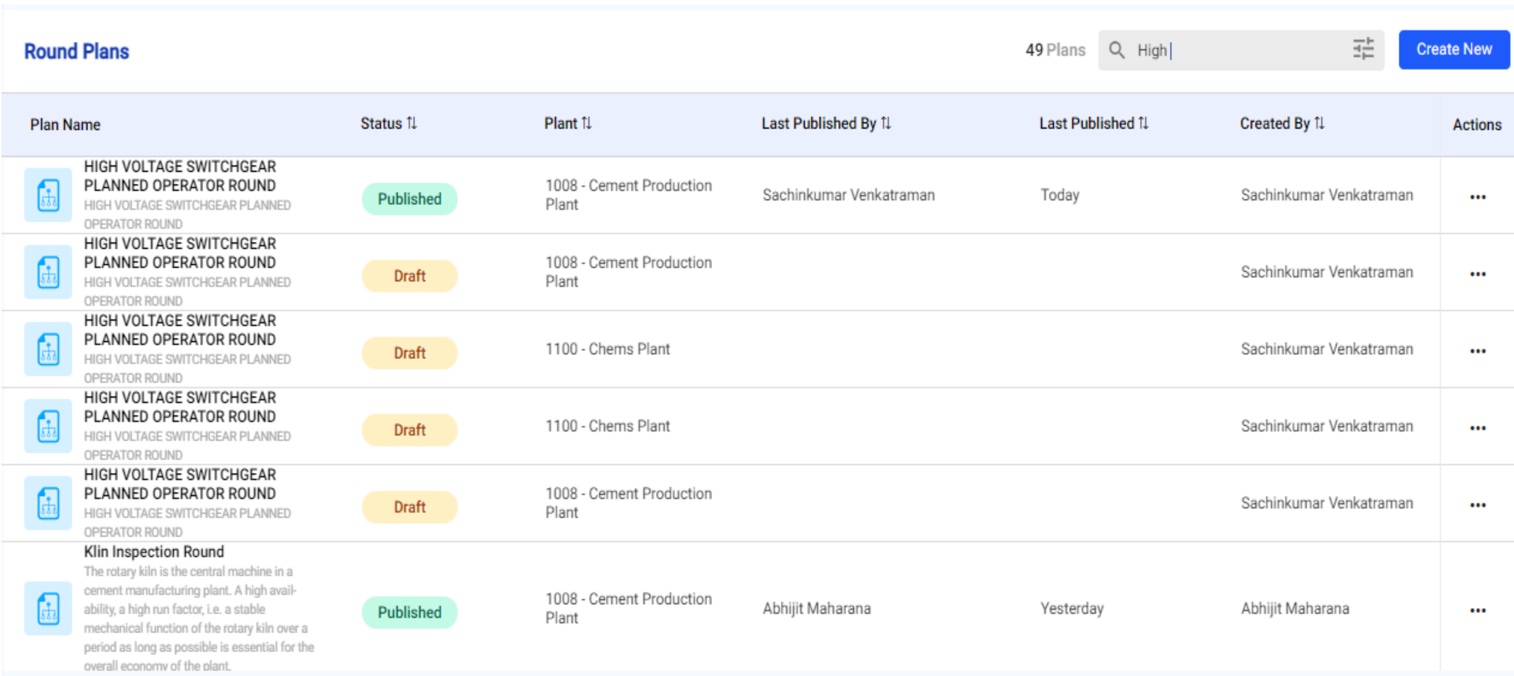
You can search for created, published (scheduled and unscheduled), archived round plans, issues, and actions from their respective screens.

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

To search round plans, issues, and actions:

1. Click the **Round Plans** section on the left-side pane.
   Click **Scheduler** for published plan, click **Archived** for archived plans and **Observations** to search issues and actions.
2. Enter the name of the round, issue, or action in the **Search** field.

Figure 3-79 Search



3. Select the round, issue, or action from the list to view details on the right side.

3.8.2. Apply Filters to Refine Results

You can use filter functionality to efficiently locate specific rounds, issues, and actions within the system.

Navigate to the respective screens and filter rounds, issues, or actions. The process is same for filtering any item.

To filter round plans, issues, and actions:

1. Click the **Round Plans** section on the left-side pane.
   Click **Scheduler** for published plans, click **Archived** for archived plans and **Observations** to filter issues and actions.
2. Click the **Filters** icon next to the **Search** field.
3. In the Filter window, select the **Status**, **Modified By**, **Created By**, and **Plants** values from the drop-down. For example, select **Status** = **Open** and **Priority** = **High**.

Figure 3-80 Filter Rounds

4. Click **Apply**.
   The filtered list is displayed.

3.9. Archive, Restore, and Delete Round Plans

The **Archive, Restore, and Delete** features provide a streamlined way to manage the lifecycle of round plans. Archiving completed or inactive plans keeps the active workspace clear, while the Restore feature allows you to bring back any archived plan when needed. These tools ensure that important plans remain accessible and organized.

This topic contains the following sub topics:

- Archive a Round Plan *(on page 229)*
- Restore a Round Plan *(on page 230)*
- Delete a Round Plan *(on page 230)*

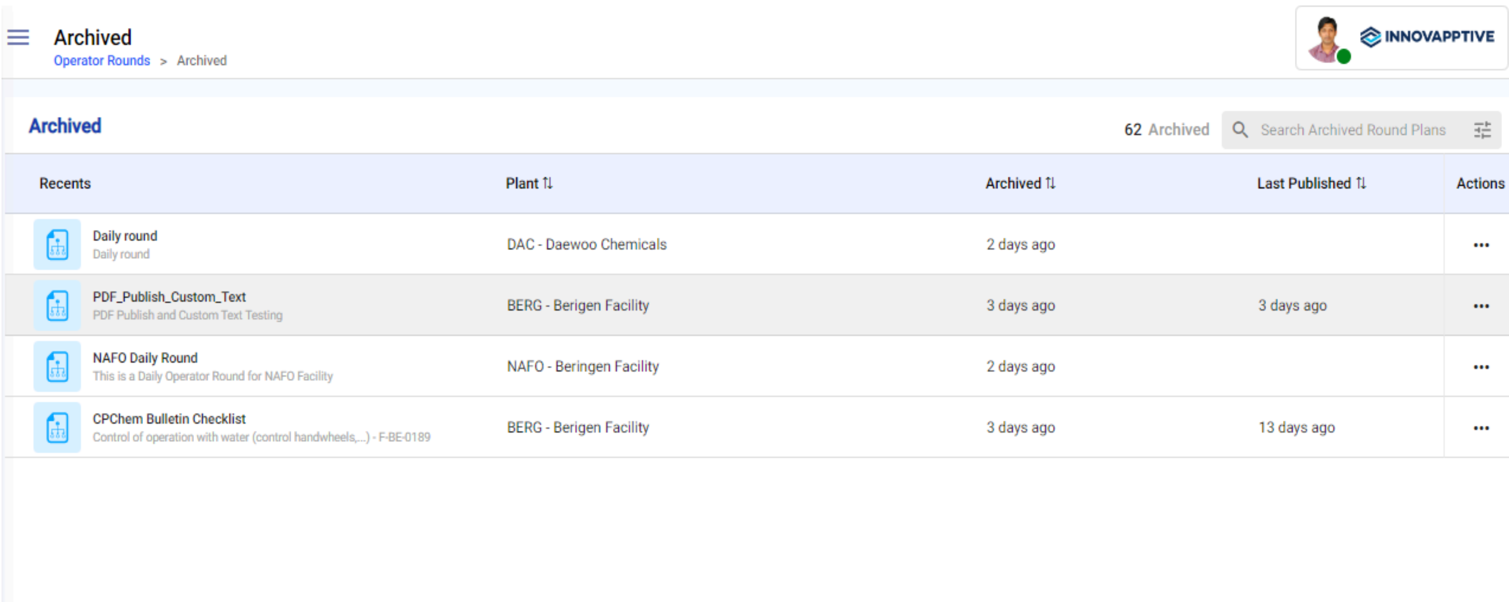
3.9.1. Archive a Round Plan

You can archive inactive round plans and remove them from the view.

To archive a round plan:

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

Figure 3-81 Archived Screen



3.9.2. Restore a Round Plan

Restore archived round plans when you need them again.

To restore an archived round plan:

1. Click the **Archive** section on the left-side pane.
2. Click the More icon and select **Restore** for the selected round plan that you want to restore.
   The round plan is restored and is displayed in the **Round Plans** screen.

3.9.3. Delete a Round Plan

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

To permanently delete an archived round plan:

1. Click the **Archive** section on the left-side pane.
2. Click the More ••• icon and select **Delete** for the selected round plan that you want to delete.
   The round plan is permanently deleted.

4. Create and Manage Master Data

Master Data forms the foundation of the system, providing essential information such as plants, shifts, locations, assets, units of measurement, and response sets. Properly setting up master data ensures seamless work order management, asset tracking, and operational efficiency.

You can add master data manually by entering details for each record individually or in bulk using an Excel upload. Bulk uploading allows you to efficiently import large datasets, reducing manual effort and ensuring data consistency.

By configuring master data correctly, you create a well-structured system that enhances workflow automation, reporting accuracy, and overall maintenance efficiency.

This chapter has the following topics:

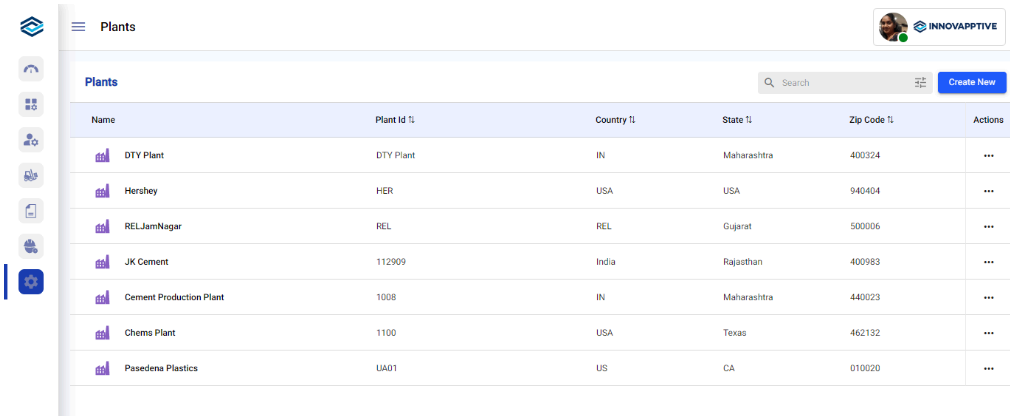
4.1. Create Plants

Creating plants allows you to define different facilities, **factories, or operational sites** within the system. Each plant represents a physical location where maintenance activities take place. By setting up plants, you can organize tasks, assets, and users based on specific sites, ensuring clear management and reporting.

To create or add a plant:

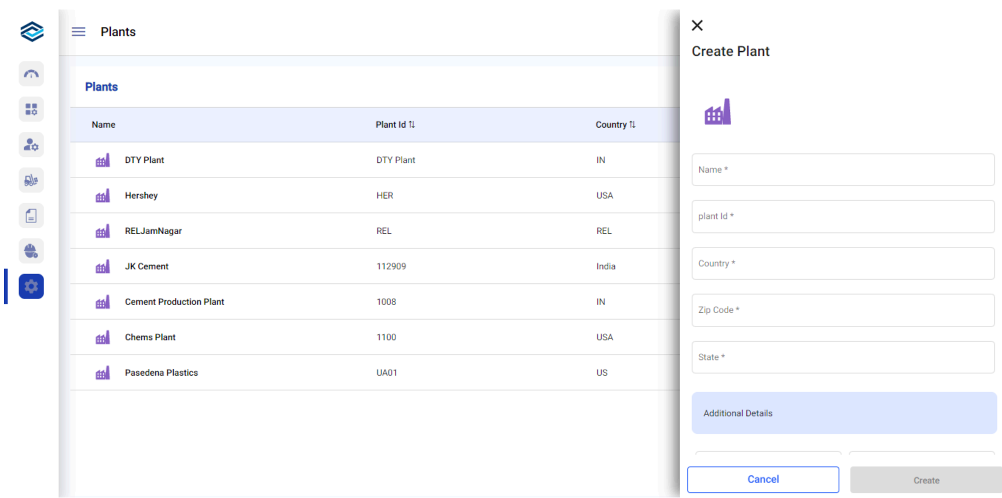
1. Click the **Master Configuration** module on the left side pane and click **Plants**.

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. Enable the **Geo Location Tracking** toggle to enable geo-location tracking while executing rounds.

5. Enable the **Activate Location/Asset Scan** toggle to allow operators to scan the asset in the assigned plant using the Scan option. If the toggle is disabled, the operators cannot view the Scan option.
6. Click **Create**.

> **Note:**
> - To modify plant details, in the **Plants** screen, click the **More** icon next to the plant and select **Edit**.
> - To delete a plant, in the **Plants** screen, click the **More** icon next to the plant and select **Delete**.

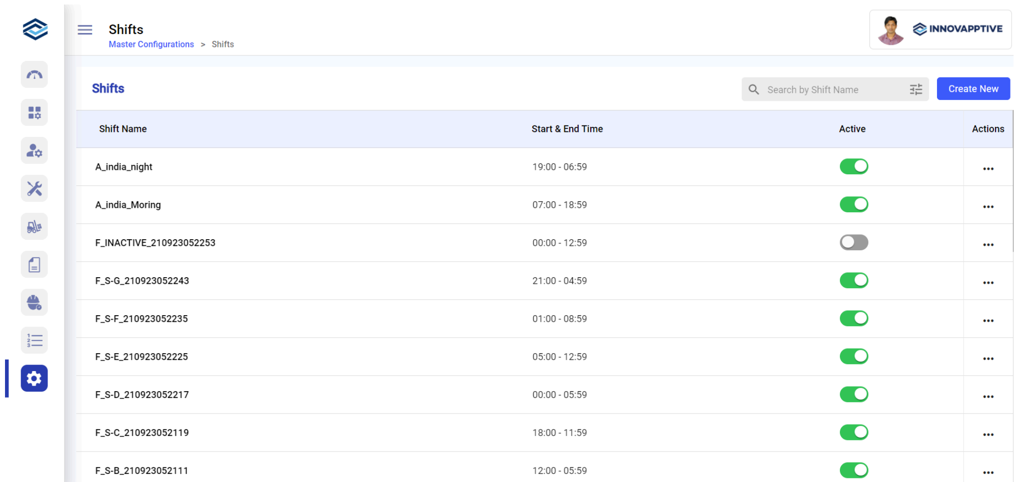
4.2. Create Shifts

Shifts help structure work schedules by defining specific time periods during which technicians and other personnel operate. Creating shifts ensures that work orders, tasks, and maintenance activities are assigned efficiently based on working hours, helping manage workload distribution and resource availability.

To create or add a shift:

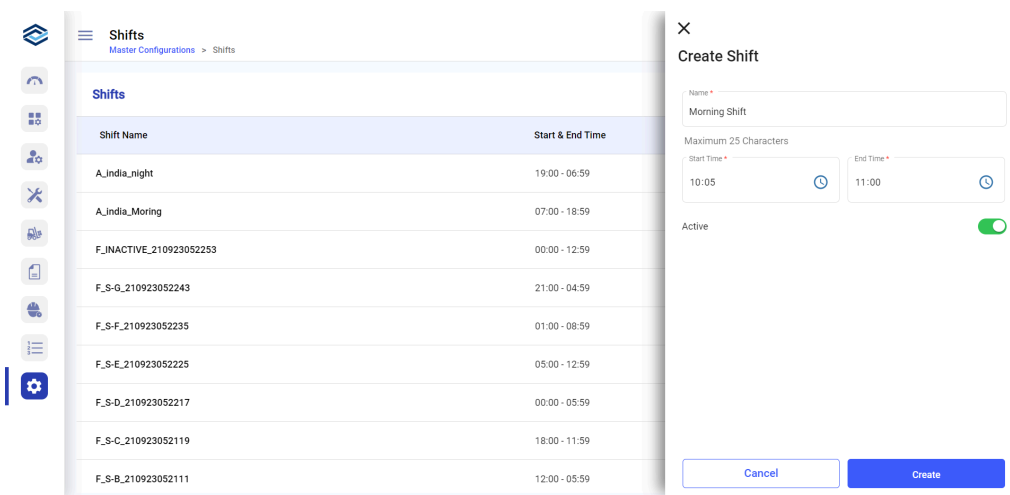
1. Click the **Master Configuration** module on the left side pane and click **Shifts**.

Figure 4-3 Shifts Screen



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

Figure 4-4 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.

   > **Note:**
   >
   > - To modify shift details, in the **Shifts** screen, click the **More** icon next to the shift and select **Edit**.
   > - To delete a shift, in the **Shifts** screen, click the **More** icon next to the shift and select **Delete**.

4.3. Create Locations

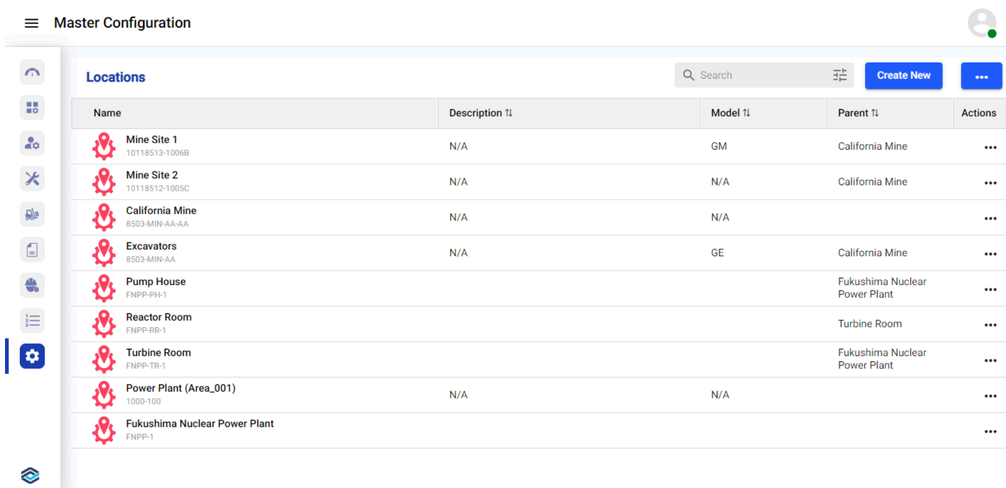
Locations represent specific areas within a plant where assets and maintenance activities are managed. For example, a plant may have locations such as Production Floor, Warehouse, or Cooling Unit Area. Defining locations allows for better tracking of assets, and maintenance tasks in a structured manner.

> **Note:**
>
> You can download already created data from SAP through synchronization.

To create or add a location:

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

Figure 4-5 Locations Screen



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

   Or

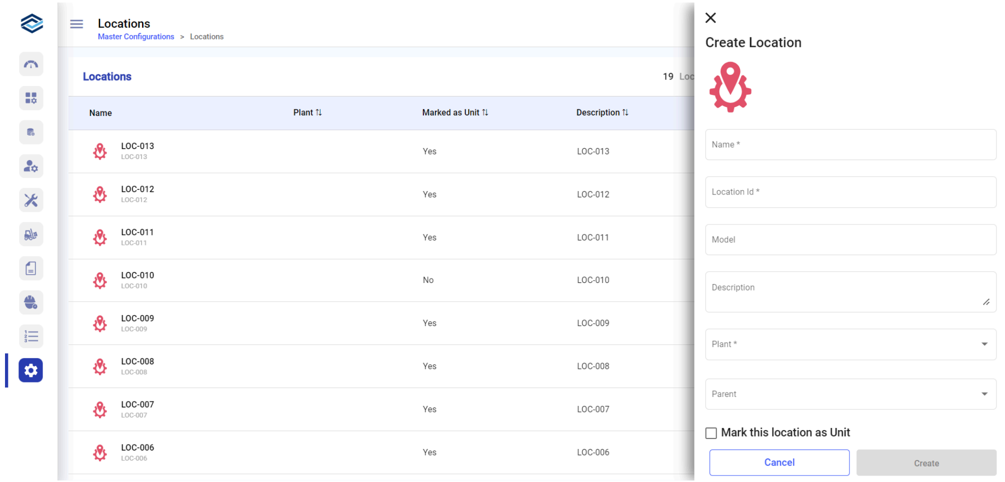
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   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 4-6 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:**
> - To download the location template, in the **Locations** screen, click the **More** icon (next to **Create New**) and select **Download Template**.
> - To modify location details, in the **Locations** screen, click the **More** icon next to the location and select **Edit**.
> - To delete a location, in the **Locations** screen, click the **More** icon next to the location and select **Delete**.
> - To deactivate a location, in the **Locations** screen, click the **More** icon next to the location and select **Deactivate**. You can see the deactivated location in the **Inactive** module under the **Locations** tab.

4.4. Create Assets

Assets refer to machines, equipment, or infrastructure that require maintenance and monitoring. By creating assets in the system, you can assign maintenance tasks, track maintenance history, and monitor performance. Each asset can be linked to a specific plant and location, ensuring organized asset management.

> **Note:**
> You can download already created data from SAP through synchronization.

To create or add an asset:

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

   Or

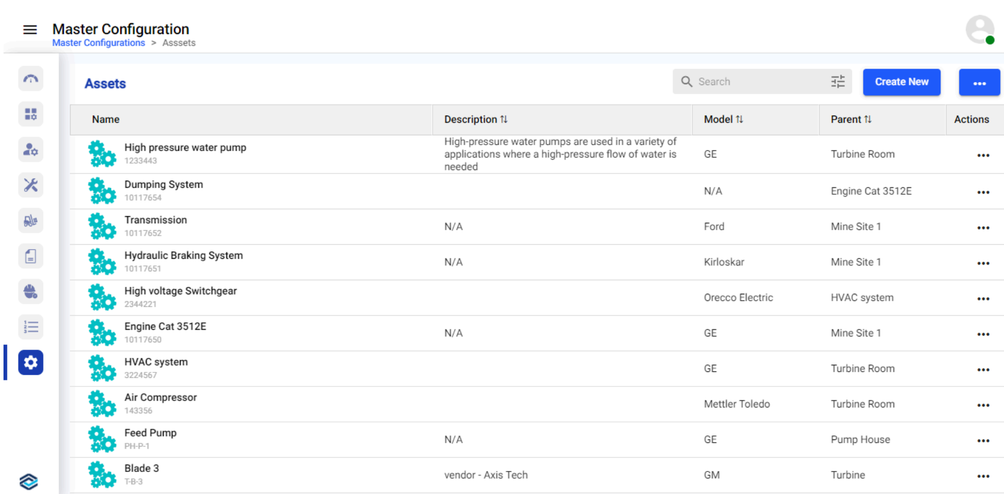
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   Or

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

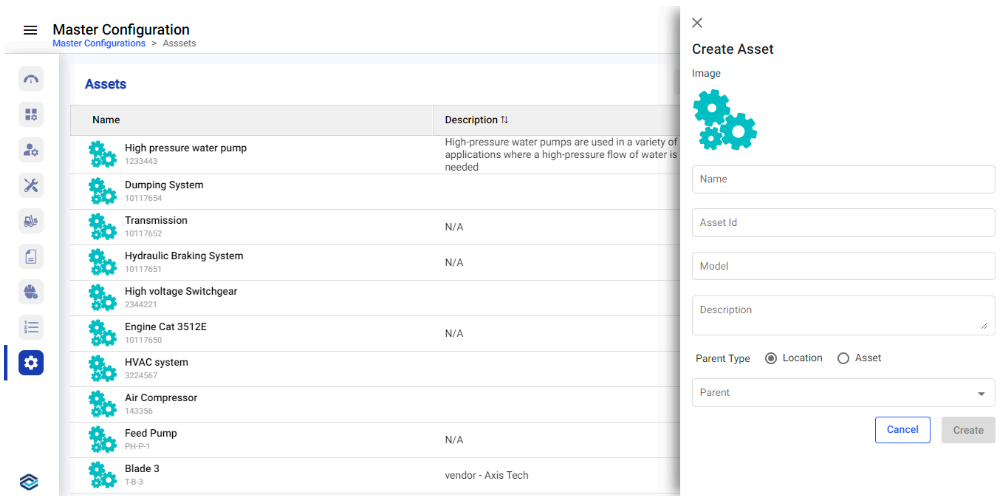
   > **Note:**
   > There should not be any existing master data to sync the data.

   Figure 4-7 Assets Screen

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

Figure 4-8 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:
- To download the asset template, in the **Assets** screen, click the More icon (next to **Create New**) and select **Download Template**.
- To modify asset details, in the **Assets** screen, click the **More** icon next to the asset and select **Edit**.
- To delete an asset, in the **Assets** screen, click the **More** icon next to the asset and select **Delete**.
- To deactivate an asset, in the **Assets** screen, click the **More** icon next to the asset and select **Deactivate**. You can see the deactivated asset in the **Inactive** module under the **Assets** tab.

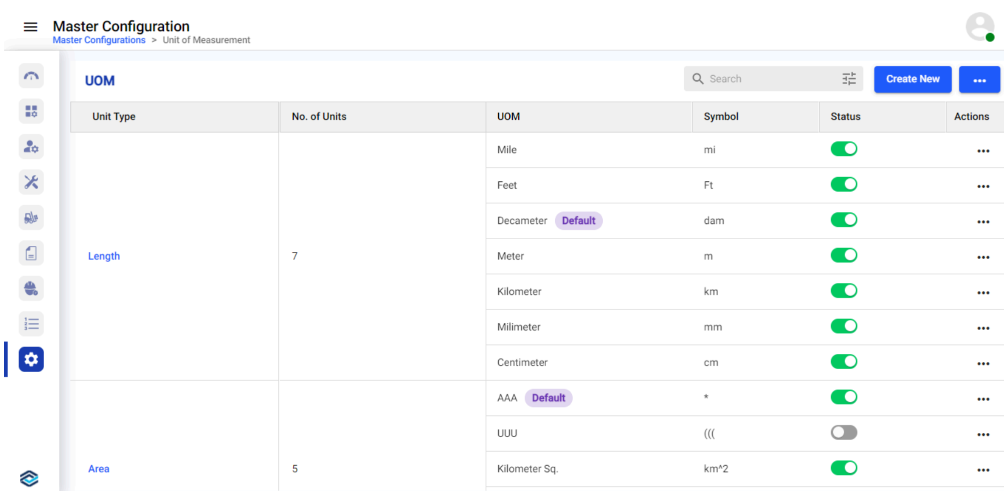
4.5. Create Unit of Measurement

Units of Measurement (UOM) define the quantities used for tracking materials, components, and measurements. For example, units like liters, kilograms, meters, or hours help standardize data entry and ensure consistency.

To add a unit of measurement:

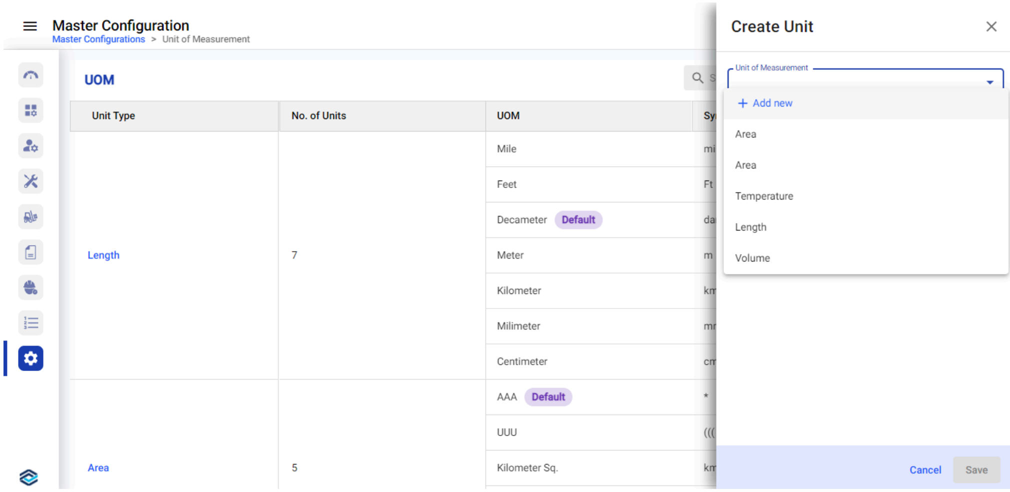
1. Click the **Master Configuration** module on the left side pane and click **Unit of Measurement**.

Figure 4-9 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.

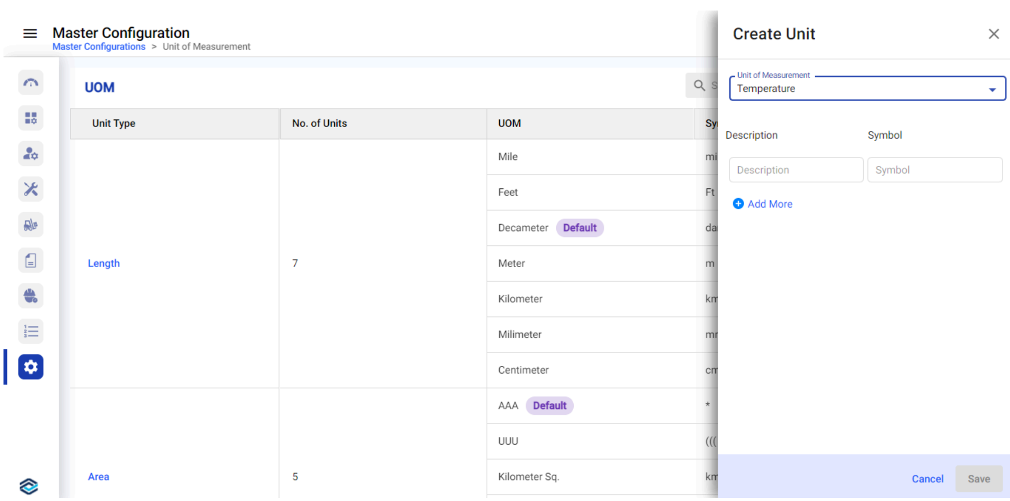
Figure 4-10 Create UOM



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 4-11 Add UOM Details



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

5. Click **Save**.

The unit of measurement is created successfully.

Note:

- To download the UOM template, in the UOM screen, click the **More** icon (next to **Create New**) and select **Download Template**.
- To edit Units of Measurement details, in the **UOM** screen, click the **More** icon next to the UOM and select **Edit**.
- To delete Units of Measurement, in the **UOM** screen, click the **More** icon next to the UOM and select **Delete**.
- To set a Unit of Measurement as default, in the **UOM** screen, click the **More** icon next to the UOM and select **Set as Default**.

4.5.1. Activate and Deactivate Unit of Measurement

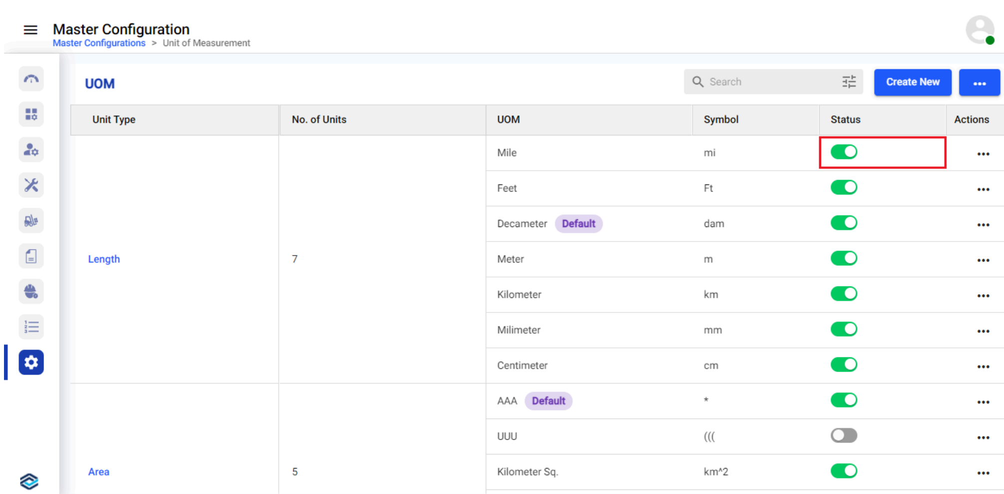
To activate/deactivate unit of measurement:

1. Enable the **Status** toggle to active for supervisors and form authors to include the unit of measurement while creating rounds and forms.

   A message UOM status changed successfully appears.

2. Disable the **Status** toggle to deactivate the unit of measurement.

Figure 4-12 Activate or Deactivate UOM



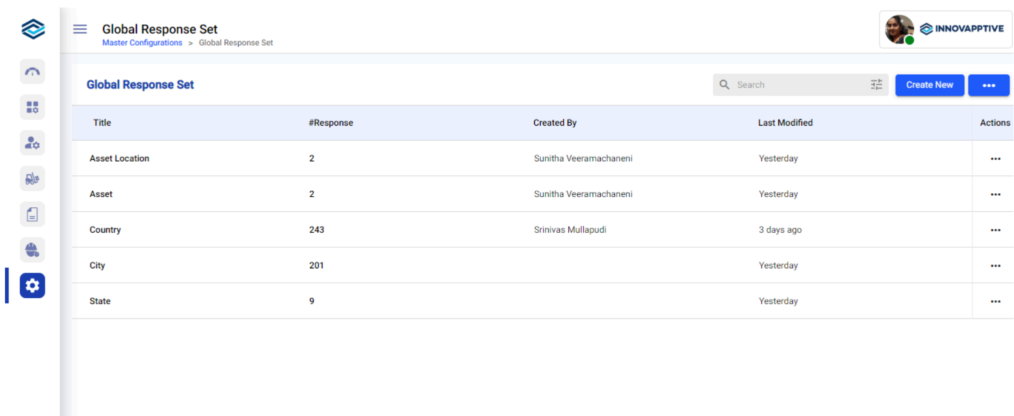
4.6. Create Global Response Set

Global Response Sets allow you to create predefined answer choices for forms, inspections, and work order documentation. Instead of manually entering responses, technicians and supervisors can select from standardized options, improving data accuracy and consistency in reporting and compliance checks. 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:

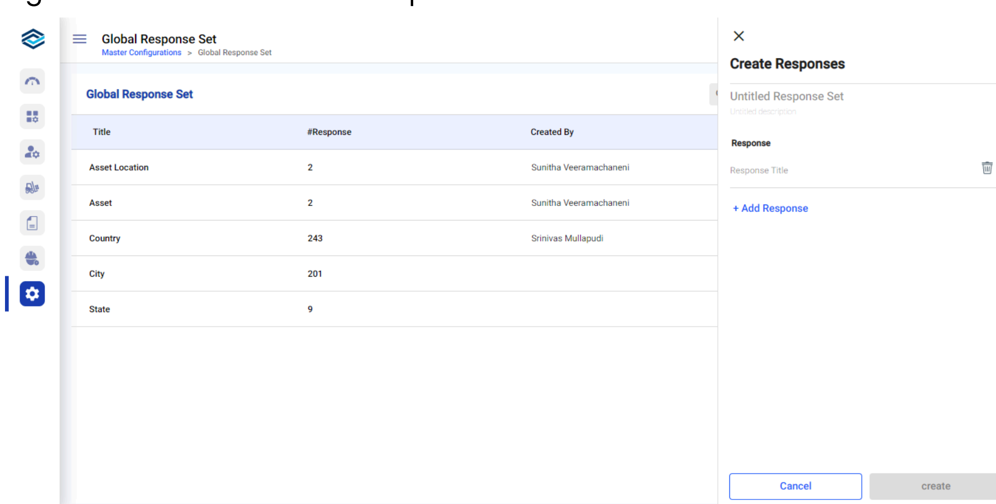
1. Click the **Master Configuration** module on the left-side pane and click **Global Response Set**.

   Figure 4-13 Global Response Set Screen

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

   Figure 4-14 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:**
> - To download the global response set template, in the **Global Response Set** screen, tap the **More** icon (next to **Create New**) and select **Download Template**.
> - To edit Global Response Set, in the **Global Response Set** screen, click **More** next to the item and select **Edit** .
> - To delete a Global Response Set, in the **Global Response Set** screen, click **More** next to the item and select **Delete**.

4.7. Bulk Upload Master Data

Bulk uploading allows you to efficiently add large sets of master data, such as **locations**, **assets**, **unit of measurement**, and **global response set** using an Excel template. Instead of manually entering data one by one, you can fill out the provided template and upload it in a few simple steps.

This process ensures accuracy, consistency, and faster data entry, making it easier to manage large datasets across the system. By following the bulk upload process, you can quickly set up and update master data, streamlining operations and reducing manual effort.

> **Note:**
> The name of the excel sheet must be *Bulk Upload - Name Template.xlsx*.

Location Master Data

To bulk upload locations:

1. Expand the **Master Configuration** module on the left side pane and click **Locations**.
2. Click the **More** icon next to the **Create New** button and click **Download Template**.

   An excel sheet that contains sample location information is downloaded.
3. Open the excel sheet and delete sample data.
4. Add location data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.
   The file is uploaded successfully. You can open it and update the details as required.

Asset Master Data

To bulk upload assets:

1. Expand the **Master Configuration** module on the left side pane and click **Assets**.
2. Click the **More** icon next to the **Create New** button and click **Download Template**.

   An excel sheet that contains sample asset information is downloaded.
3. Open the excel sheet and delete sample data.
4. Add asset data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.
   The file is uploaded successfully. You can open it and update the details as required.

UOM Master Data

To bulk upload unit of measurement:

1. Expand the **Master Configuration** module on the left side pane and click **Unit of Measurement**.
2. Click the **More** icon next to the **Create New** button and click **Download Template**.

   An excel sheet that contains sample UOM information is downloaded.
3. Open the excel sheet and delete sample data.
4. Add UOM data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.
   The file is uploaded successfully. You can open it and update the details as required.

Global Response Set Master Data

To bulk upload global response set master data:

1. Expand the **Master Configuration** module on the left side pane and click **Global Response Set**.
2. Click the **More** icon next to the **Create New** button and click **Download Template**.

   An excel sheet that contains sample global response set information is downloaded.
3. Open the excel sheet and delete sample data.
4. Add global response set data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the 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.

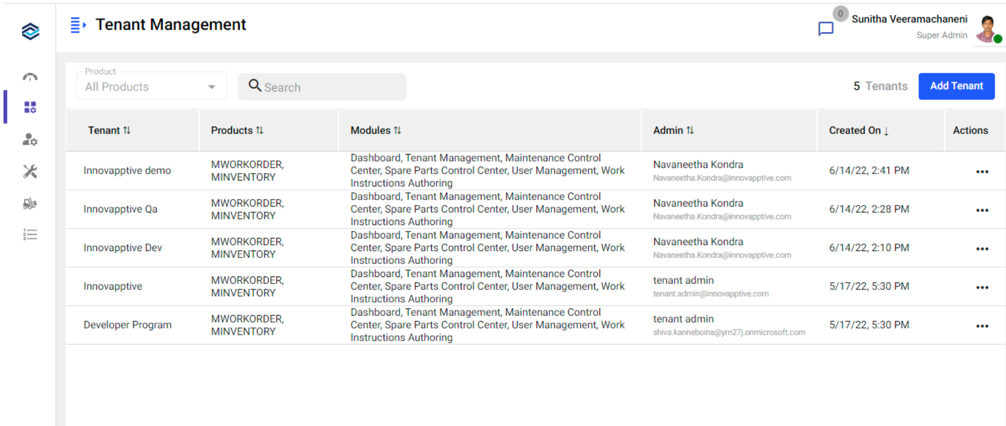
5.1. Create Tenant/Super Admin role

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.

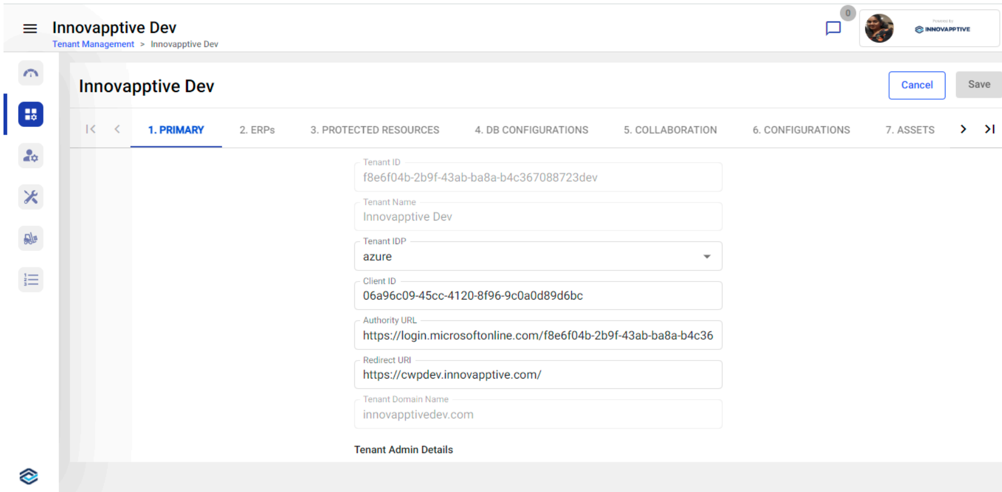
Figure 5-1 Tenant Management Module



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**.

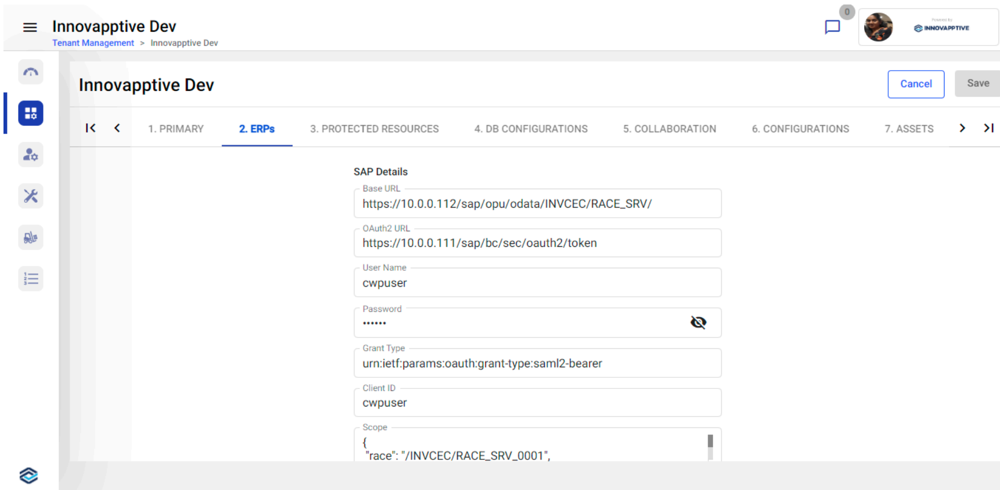
> **Note:**
> The email is valid based on the selected **Tenant IDP**.

Figure 5-2 Add Tenant Primary Details



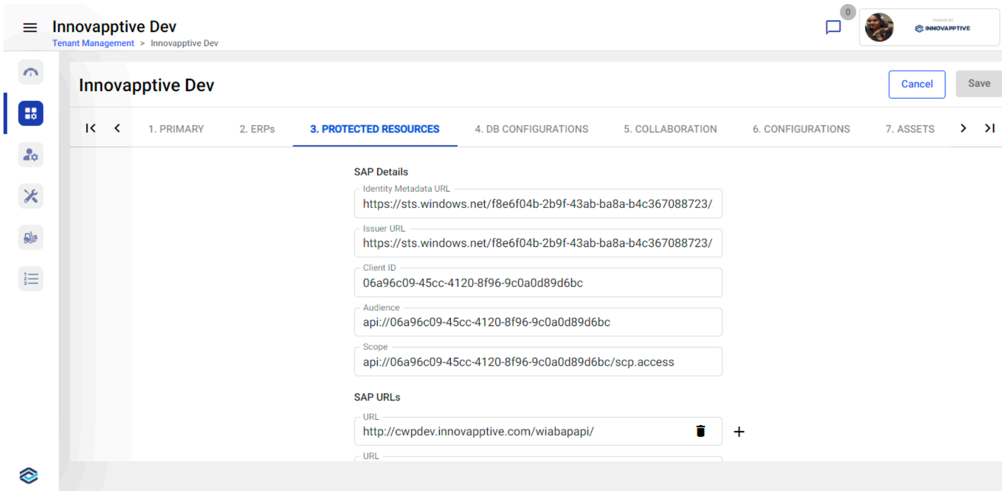
4. In the **ERPs** tab, do the following:
    a. In the **SAP Details** section, enter the following:
        i. **Base URL** – enter the relevant URL.
        ii. **OAuth2 URL** – enter the relevant URL.
        iii. **User Name** – enter the customer username.
        iv. **Password** – enter the customer 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



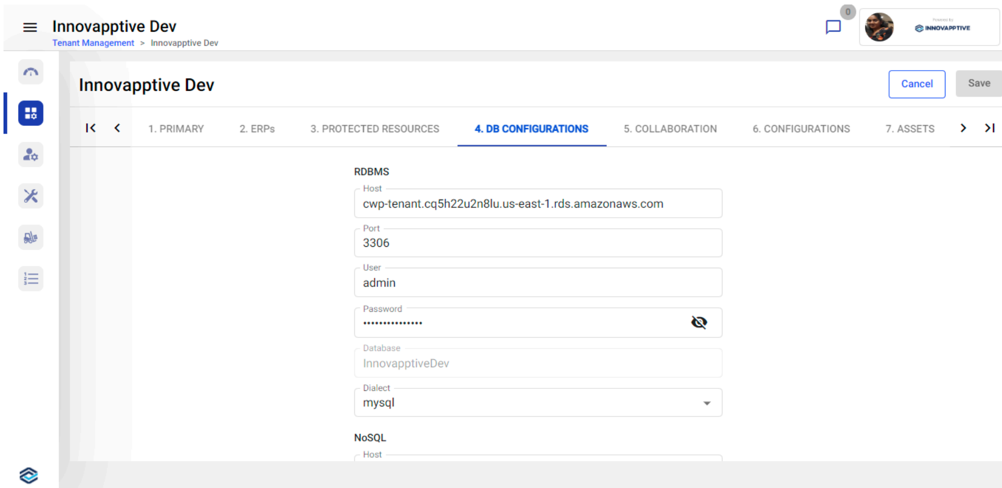
5. In the **Protected Resources** tab, do the following:
   a. In the **SAP Details** section, enter the following:
      i. **Identity Metadata URL** – enter the metadata URL.
      ii. **Issuer URL** – enter the issuer URL.
      iii. **Client ID** – enter the client id.
      iv. **Audience** – enter 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

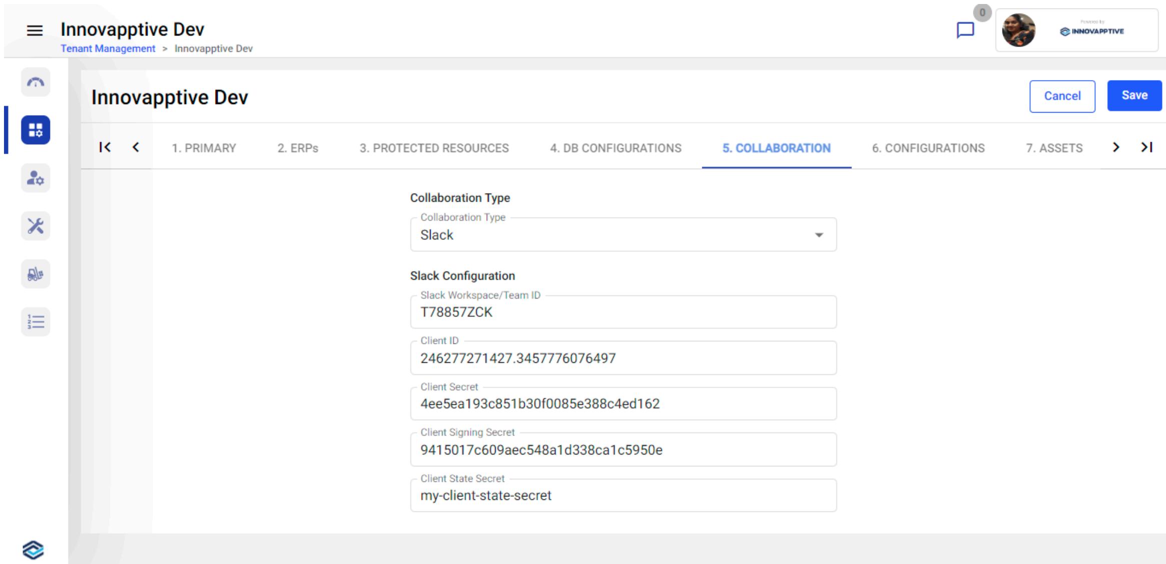


6. In the **DB Configurations** tab, enter the following:
    a. In the **RDBMS** section, enter the following:
        i. **Host** – enter the database host.
        ii. **Port** – enter the port number.
        iii. **User** – enter the username.
        iv. **Password** – enter the password.
        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

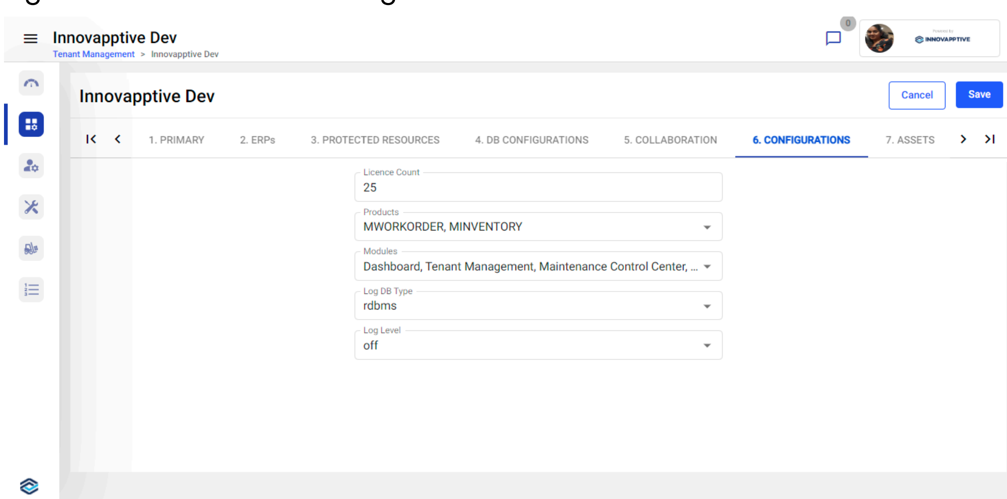


7. In the **Collaboration** tab, enter the following:
    a. **Collaboration Type** – select a collaboration type Slack or MS Teams to connect to the external chat application.
    b. If the **Collaboration Type** is **Slack**, enter the following:
        i. **Slack Workspace/Team ID**: enter slack 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.



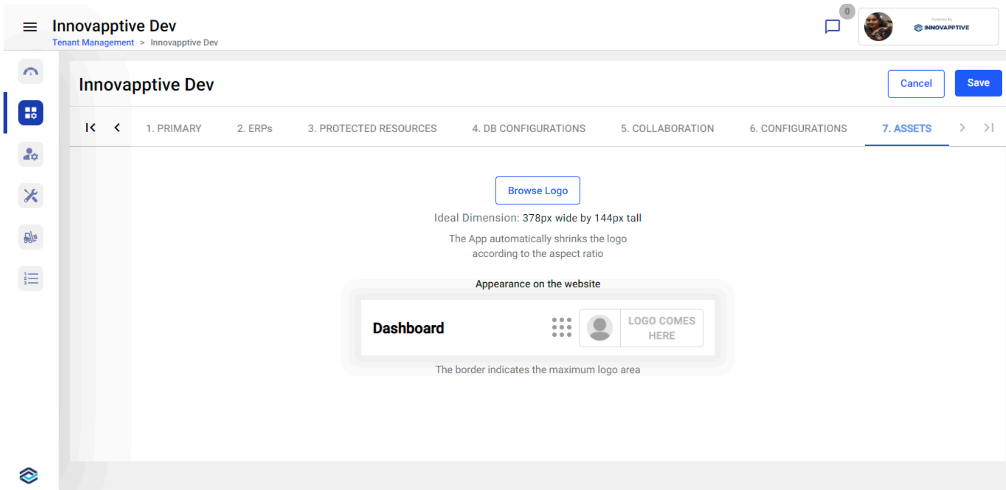
8. In the **Configurations** tab, enter the following:
   a. **License Count** – enter the count of the licenses that are provided to the tenant.
   b. **Products** – select the products that are assigned to the tenant from the drop down.
   c. **Modules** – select the modules that are assigned to the 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

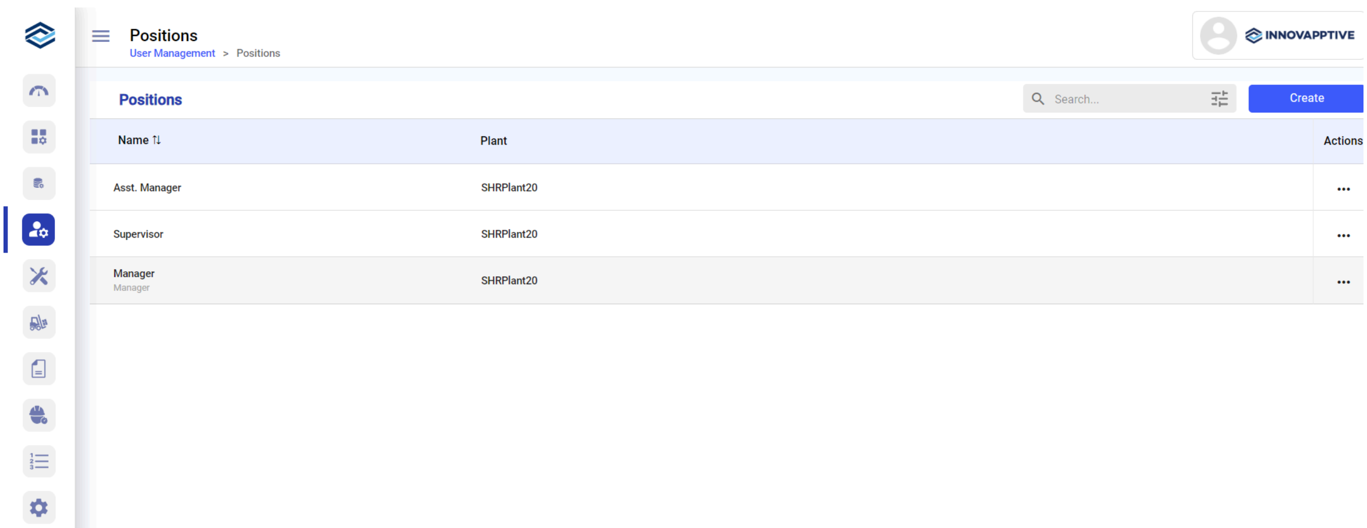
Create positions like manager, supervisor and so on and assign users to them.

To create a position:

1. Expand the **User Management** module and select **Positions** on the left-side menu.

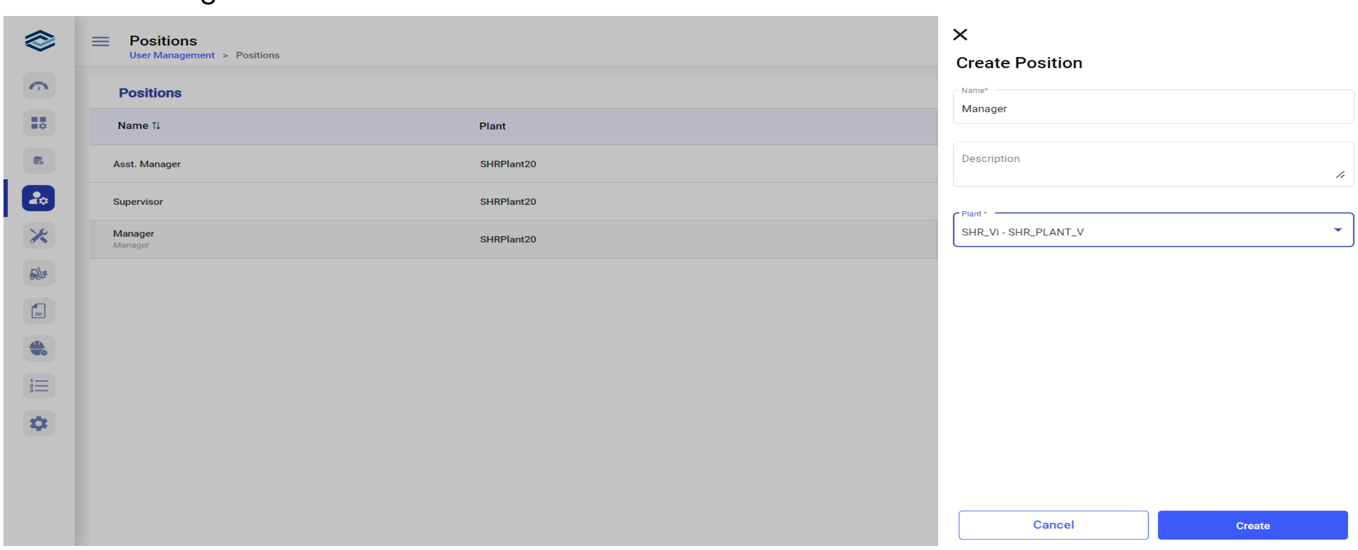
> **Note:**
>
> > **Note:**
> >
> > To see the Create Positions module, click the Hamburger menu on the top left and then click the Expand icon next to User Management.

Figure 6-1 Positions Screen



2. In the **Positions** screen, 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.
    - Delete the position using the **More** icon > **Delete** next to the position.

6.2. Create Roles and Assign Permissions

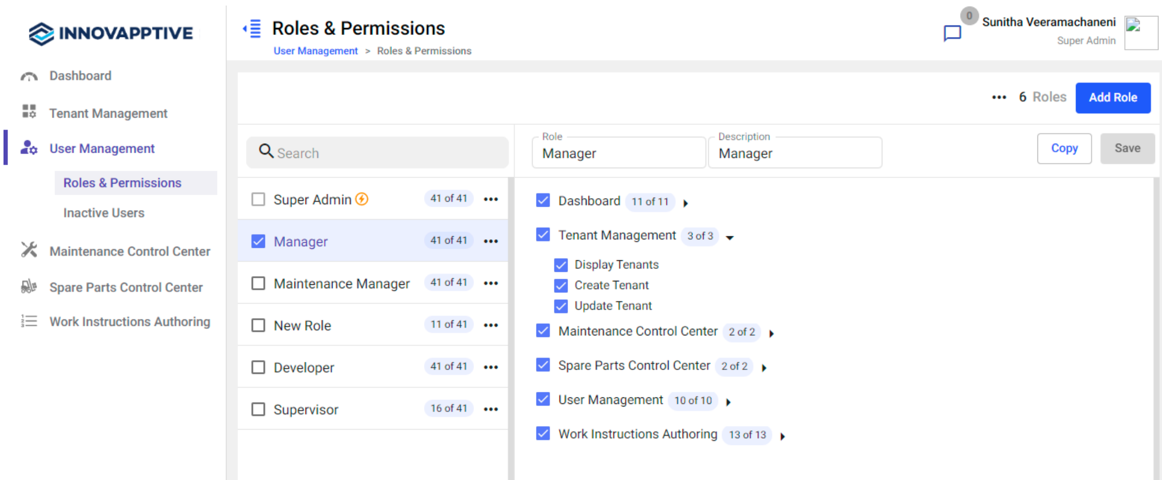
Roles and Permissions define **who can access what** within the system, ensuring secure and efficient workflow management. By assigning roles such as **Super Admin**, **Admin**, **Supervisor**, **Manager**, **Operator**, and **Technician**, you can control user access based on job responsibilities.

Each role is granted specific permissions, allowing access to relevant modules and functions. For example, a supervisor may have permissions to create and assign rounds, while an operator may only have access to view and execute assigned tasks. Configuring roles and permissions ensures that users have the right level of access, enhancing security and maintaining an organized workflow.

To create a role and assign permissions:

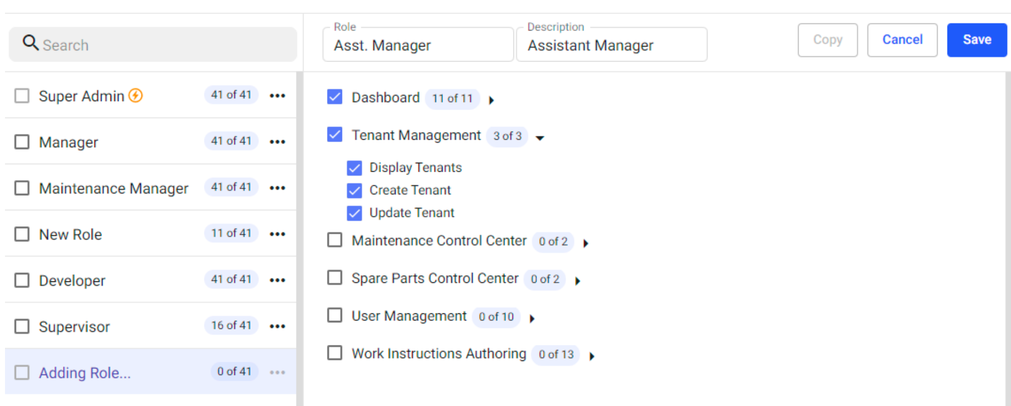
1. Expand the **User Management** module and select **Roles and Permissions** on the left-side menu.

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. Create Users and Assign Roles

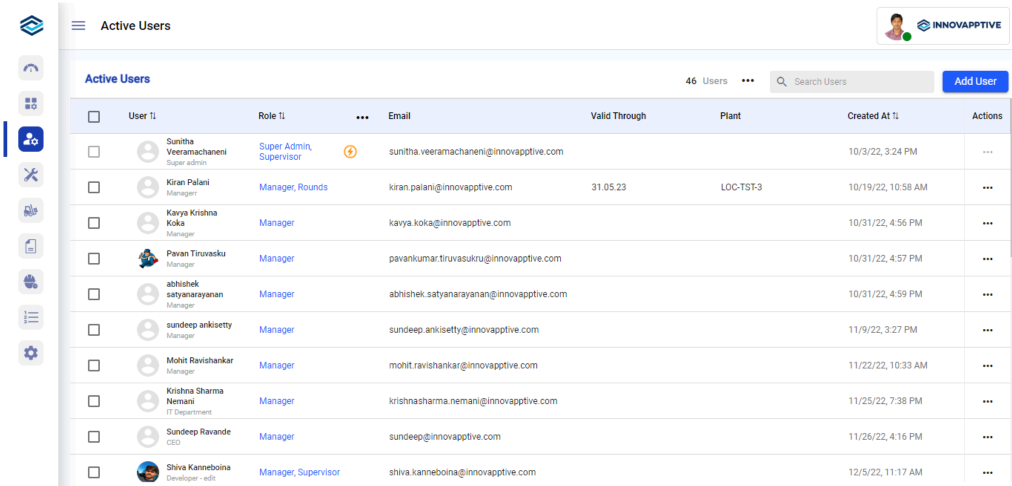
Creating users allows you to add personnel to the system and assign them appropriate roles and permissions. When adding a new user, you define their role (such as Supervisor, Technician, or Manager) and configure their access permissions based on the modules they need.

By setting up users correctly, you ensure that each team member has the right level of access to perform their tasks efficiently while maintaining system security and data integrity.

To create a user and assign a role:

1. Expand the **User Management** module and select **Active Users** on the left side menu.

Figure 6-5 User Management Module



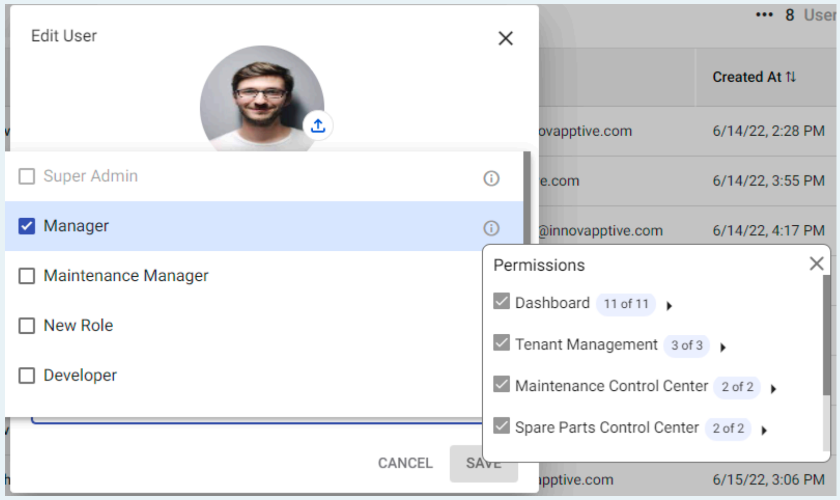
2. In the **Active Users** screen, click the **Add User** button on top right.
3. In the **Add User** window, do the following:
    a. Add the photo of the user.
    b. Enter the first name of the user in the **First Name** field.
    c. Enter the last name of the user in the **Last Name** field.
    d. Enter the title of the user in the **Title** field.
    e. Enter the mail id of the user in the **Email** field.

> **Note:**
> You can maintain two separate email addresses to access both the Web and Mobile applications.

    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.

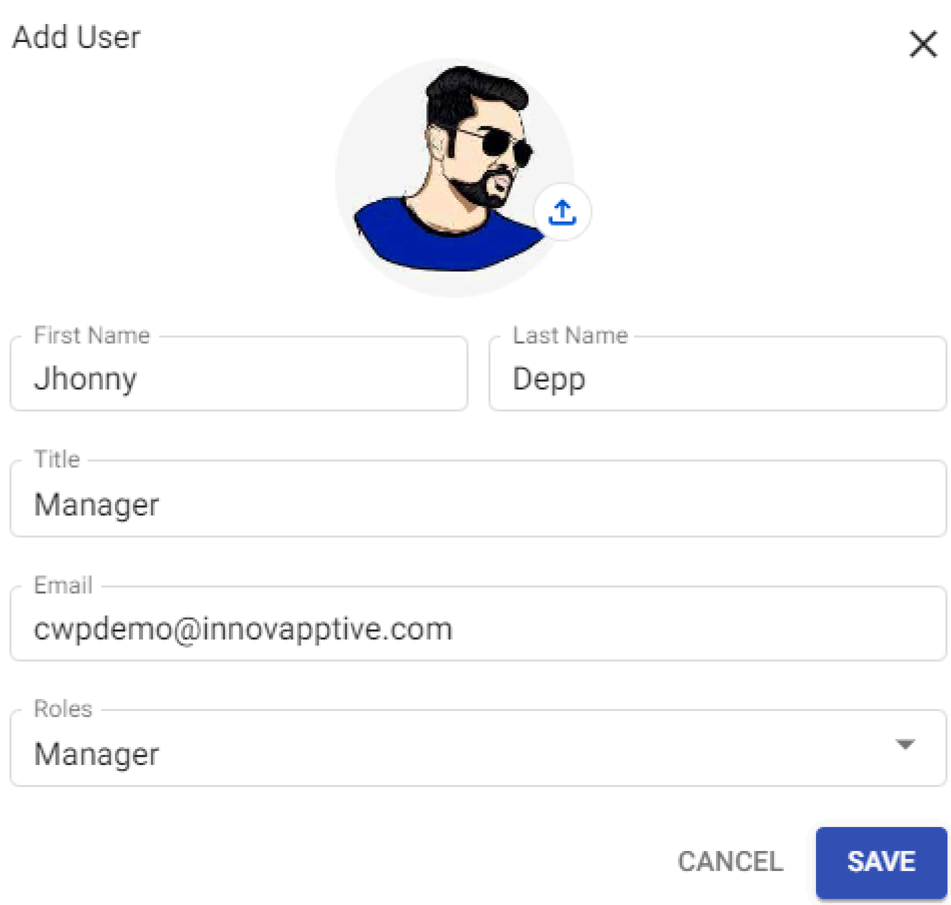
h. Select the dates from the **Valid From** and **Valid Through** calendars.

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

User Groups allow you to organize users with similar roles and responsibilities into a single group, making it easier to manage access and permissions. Instead of assigning permissions individually, you can assign them at the group level, ensuring consistency and reducing administrative effort.

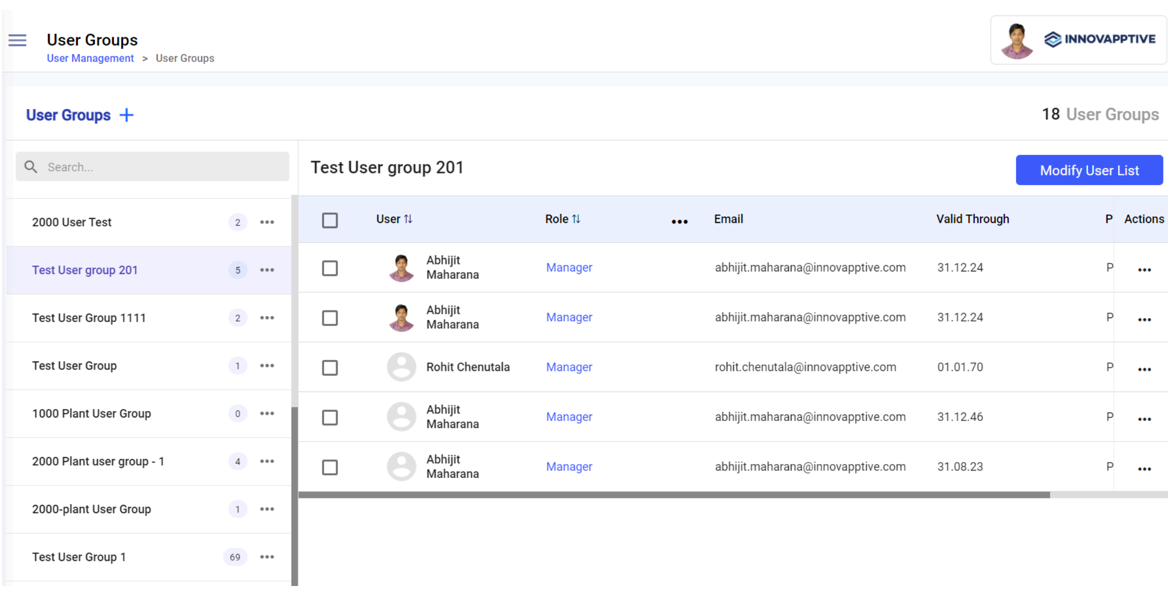
For example, all Technicians in a plant can be part of a *Technician Group* with predefined access to Work Orders and Issue Reporting, while Supervisors in a *Supervisor Group* may have permissions to assign and monitor work orders.

By using User Groups, you can streamline user management, ensure role-based access control, and improve operational efficiency.

To create a user group and assign it to user:

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

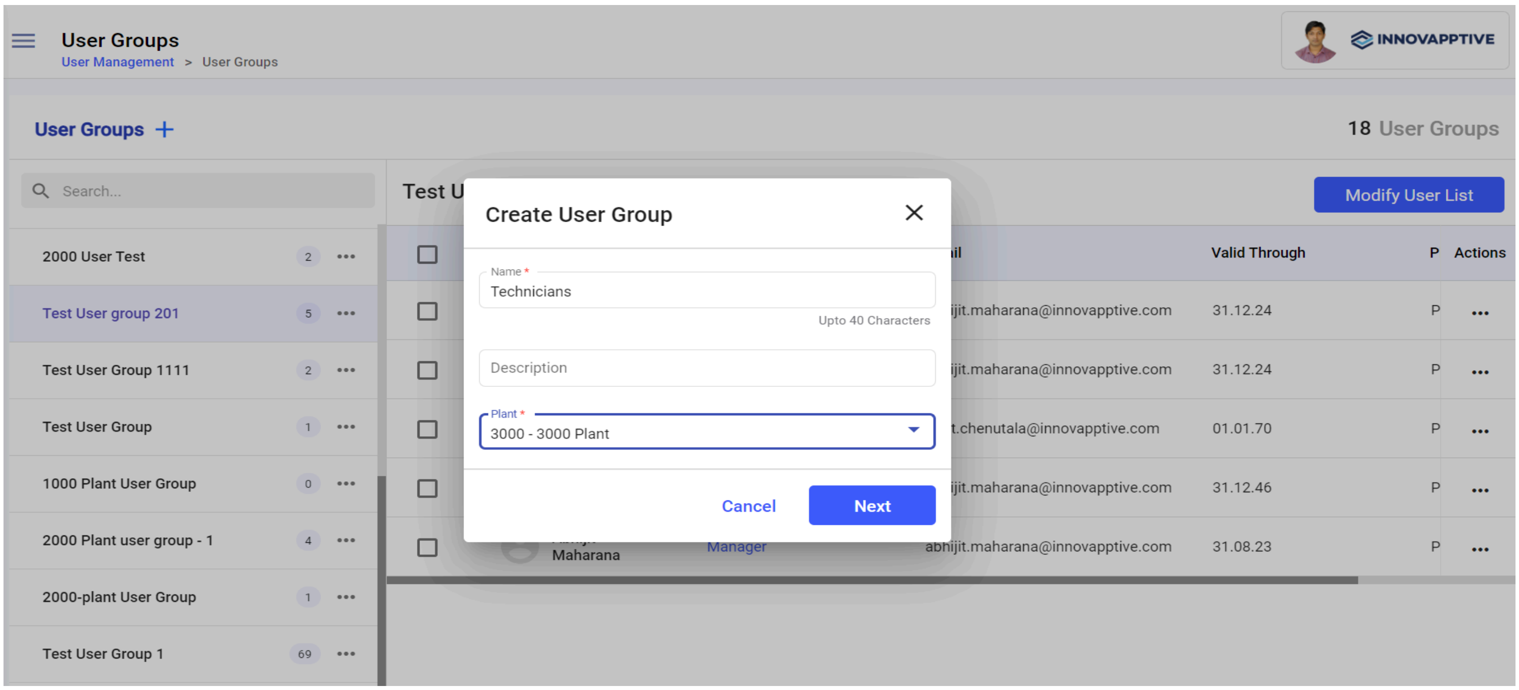
Figure 6-8 User Groups Screen



2. In the **User Groups** screen, 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,

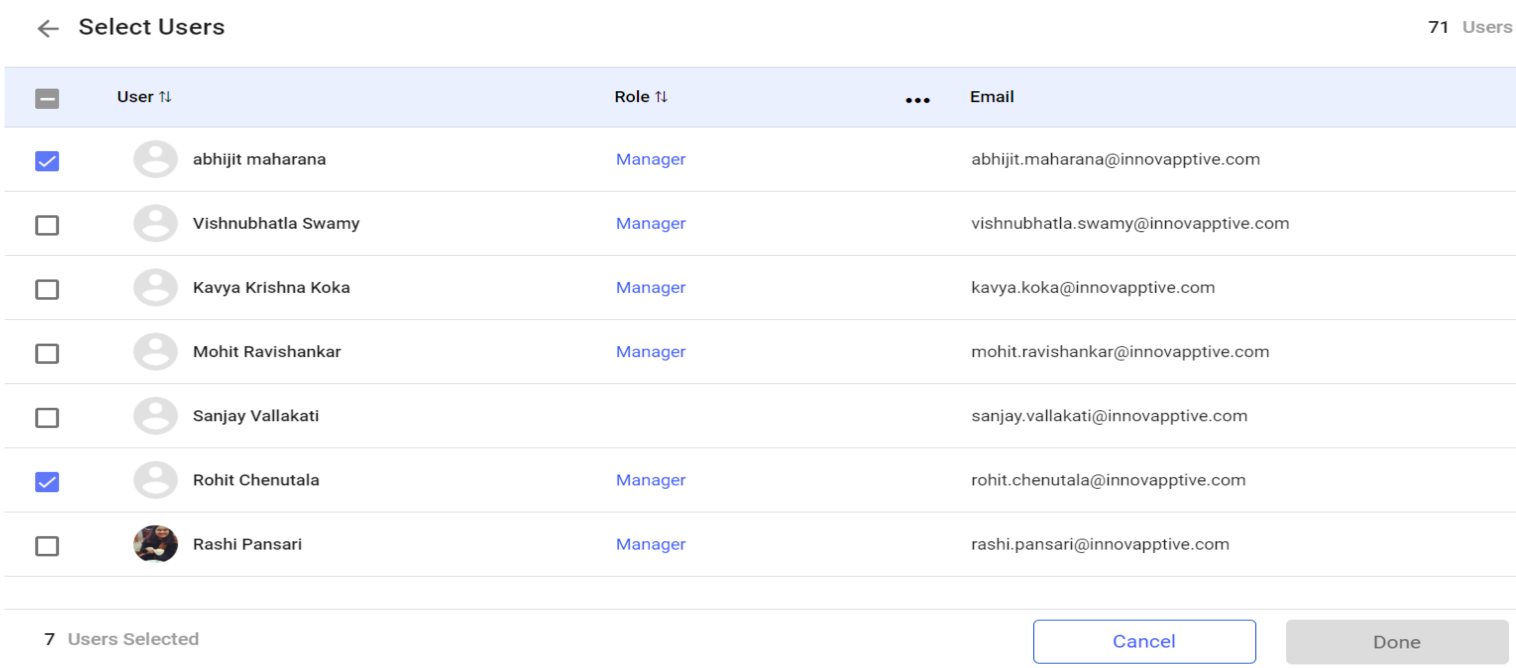
   - Copy the user group using the More ••• icon > **Copy** option next to the user group on the left-side section.
   - Delete the user group using the More ••• icon > **Delete** option next to the user group on the left-side section.
   - Edit the user group using the More ••• icon > **Edit** option next to the user group on the left-side section.

Modify User List

To modify users 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 6-10 Modify Users



The users are removed from the user group.

Note:
You can also,

- Click the More icon next to the each user and select **Remove User**.
- Select the check box in the **User** column and click **Remove User** at the bottom to remove all the users at once.