mRounds Configuration Guide

Connected Worker Solutions

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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 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. 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.

Table 1-1 New Features and Enhancements in Release 2506

Streamline Round Plan Creation with Task Import Functionality

Table 1-1 New Features and Enhancements in Release 2506 (continued)

Save time and keep things consistent by reusing content from existing Round Plans. With the new Import Task option, authors can quickly bring in tasks, sections, or pages—no need to recreate them from scratch.
Easily Change Due Dates of Adhoc Rounds from the Mobile App Now you can easily update due dates for Adhoc Rounds right from the mobile app. This gives you more control in the field and helps keep tasks aligned with changing operational needs.
Selective Barcode Scanning Enforcement for Round Plans Boost flexibility with selective **barcode scanning**. Make scanning mandatory only for specific Round Plans, while keeping other rounds quick and streamlined.
Bulk Upload and Export of Round Plans and Form Templates via Excel Round Plan Authors can now **bulk upload and export Round Plans and Form Templates** using a structured Excel template. This saves time, reduces manual effort, and makes it easier to onboard standard templates at scale.
Post Measurement Differences to SAP Based on Configuration Ensure accurate SAP syncing with the new option to post only the difference in measured values. This improves data precision, reduces manual work, and keeps integrations seamless.
Track Progress in Real Time with Visual Indicators on Round/Task Cards Stay on top of your work with real-time progress indicators on each round or task card. Quickly see how much is done and what's left, helping you manage time and track tasks more easily in the field.
New Real-Time Exception Monitoring Widget on the Exception Dashboard

Table 1-1 New Features and Enhancements in Release 2506 (continued)

A new **Exception Dashboard widget** gives instant visibility into abnormal conditions. It highlights assets with readings (like pressure or temperature) outside normal ranges in real time.
Automated Email Scheduling for Custom and Out-of-the-Box Dashboards Boost reporting efficiency with **Automated Email Scheduling** for both custom and OOTB dashboards. Schedule recurring email deliveries for timely insights—no manual effort needed. Existing data can also be migrated smoothly to the new dashboards.
Send Round Data to SQL Server Without Tags and Include Historical Data Get more flexible **SQL Server export** options. You can now send Round Data without needing tags and optionally include historical data—making analytics, reporting, and integrations easier.
Analyze Historical Data with Trend-Based Visualizations Users can now view trend-based charts of historical readings from mobile apps. This helps teams analyze performance over time, spot issues early, and make data-driven decisions.
Improved Numeric Field Input with Flexible Decimal Separator Support Improved numeric field handling now supports both period and comma as decimal separators. The system automatically converts and validates inputs for accurate, consistent data storage.

Table 1-2 New Features and Enhancements in Release 2504.02

Deeper Insight into Operator and Team-Level Inspection Activity The Operator Productivity Dashboard now offers improved drill-downs and performance segmentation. Supervisors can track round completion, overdue inspections, and compliance across individual operators and defined groups—like shifts, locations, or departments—enabling clearer, more actionable performance management.

Table 1-2 New Features and Enhancements in Release 2504.02 (continued)

Deeper Visibility into How Users Engage with Inspection Workflows Track how operators and supervisors interact with various inspection-related actions—such as filling forms, clicking action buttons, or submitting inspection reports. Build behavioral profiles and uncover friction points within inspection tasks to improve efficiency and adoption.
Review Inspection Submissions and Take Action—All in One View Supervisors can now interactively review submitted rounds within the system, without exporting data. This allows faster identification of incomplete inspections, missed scans, or abnormal readings—and enables corrective action right from the review screen.
Seamless Shift Transitions—Tailored to Each Role Operators and Supervisors can now create and submit Shift Handover Reports directly from their mobile devices, with report formats automatically tailored to their roles. This ensures that the right information is captured during each shift transition, reducing errors and improving accountability.
Custom Configuration for Consistent and Relevant Shift Transitions Supervisors can now configure Shift Handover Report formats based on specific plant requirements. With flexible field settings and formats, each site can tailor the shift handover process to local workflows—ensuring consistent and meaningful shift change documentation. For more information, see Create Plants *(on page 73)*.
Capture Visual Proof with Location and Time Accuracy Every image captured or uploaded during inspections is now automatically tagged with a timestamp and GPS coordinates. This enhancement ensures visual records are verifiable, audit-ready, and easy to retrieve based on when and where they were taken.
Instant Sync of Field Readings to SAP

Table 1-2 New Features and Enhancements in Release 2504.02 (continued)

Supervisors can now push measurement readings captured during inspections directly to SAP through seamless API integration. This eliminates manual entry delays and ensures real-time data availability for faster decision-making.
Capture Plant-Specific Data and Trigger SAP Notifications Supervisors can now define custom fields in issue reports—complete with help text, default values, and auto-fill rules—to capture plant-specific inspection data. These fields are mapped to SAP notifications, ensuring seamless integration with backend processes.
Targeted Insights for Product-Specific Inspection Analysis The Reports module now includes filters for plant-based product lines, allowing supervisors to isolate and analyze data specific to a product category. This helps identify trends, performance gaps, and improvement areas without wading through unrelated data.
Quickly Refine and Focus Inspection Data Smart Filters on the Rounds screen help supervisors and operators narrow down inspection records with ease. Whether you're tracking specific dates, statuses, or locations, the filters make it simple to locate what you need without delay.

New Features and Enhancements in Release 2503

Table 1-3 New Features and Enhancements in Release 2503

Automatic Cascading of Shift Notes and Standing Instructions Shift notes and standing instructions entered at the plant level now automatically cascade down to the unit and position levels. There's no need for manual copying or re-entry. Any local notes or instructions added at lower levels are preserved and shown alongside the plant-level information.
Offline Outbox for Seamless Synchronization

Table 1-3 New Features and Enhancements in Release 2503 (continued)

When you're working offline, any changes you make—like creating, updating, or deleting records—are safely stored in a temporary queue called the Offline Outbox. As soon as your device reconnects to the internet, these changes are automatically synced to the cloud, so you don’t have to worry about losing your work or re-entering data.
Shift Logs with Conditional Logic You can now use Conditional Logic in your unit’s Shift Log, which allows you to view and fill out Shift Logs that are specific to your assigned unit. This improvement helps keep things simple by showing only relevant information, making your logging experience more focused and avoiding confusion from other units.
Mobile Access to Configured Issue Templates Users can view and use plant-specific Issue Templates right from the mobile app . These templates come with pre-filled fields, helpful guidance, and default values to make it quicker and easier to create issues—keeping everything consistent and aligned with your plant’s standards, even when you're offline.
Operator Productivity Hub The new Operator Performance Dashboard gives you a complete view of operator performance, from round completions to issues raised. You can easily drill down and apply time-based filters to spot trends, identify gaps, or highlight top performers. Whether you're tracking compliance, pinpointing training needs, or celebrating high achievers, this dashboard provides all the insights you need, right at your fingertips.

New Features and Enhancements in Release 2501 SP01

Table 1-4 New Features and Enhancements in Release 2501 SP01

Enhanced Exception Handling for Multiple-Choice & Global Picklist Responses

Table 1-4 New Features and Enhancements in Release 2501 SP01 (continued)

Users can now track and manage exceptions more effectively in Round Plans and Templates. This update allows modifying response options, flagging critical deviations, and applying exceptions at the task level. Exceptions persist when copying, archiving, or restoring templates, ensuring consistency. Enhanced reporting provides insights by tracking exceptions across tasks, locations, and assets.
Real-Time SAP Sync for Live Issue Tracking mRounds now syncs SAP notifications in real time, allowing users to track issue statuses directly on Mobile and Web without needing separate SAP or mWorkOrder access. This update improves visibility, reduces system switching, and ensures faster response times, keeping maintenance teams aligned and efficient.

New Features and Enhancements in Release 2501

Table 1-5 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. • **Seamless Asset Integration**: Quickly scan asset or location IDs while creating issues or actions, eliminating manual entry errors and speeding up the documentation process. • **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 73)*.
Enhanced Communication & Historical Insights

Table 1-5 New Features and Enhancements in Release 2501 (continued)

• **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.
Enhanced User Experience • **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".
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).
Smarter Workflow Controls

Table 1-5 New Features and Enhancements in Release 2501 (continued)

- **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

- **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 1-6 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:

Table 1-6 New Features and Enhancements in Release 2408 (continued)

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

Table 1-6 New Features and Enhancements in Release 2408 (continued)

• **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.
Improved Productivity with Seamless Task Navigation 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.
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.
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 1-6 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.
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.
Enhanced Location Access for Precise Task Execution 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:

Table 1-6 New Features and Enhancements in Release 2408 (continued)

• **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.
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 73)*.
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: • **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.
Flexible Passcode Configuration

Table 1-6 New Features and Enhancements in Release 2408 (continued)

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.

New Features and Enhancements in Release 2404

Table 1-7 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.
Self Assign Rounds from My Rounds This usability enhancement helps operators assign open rounds to self directly from the My Rounds screen.
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.
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.
Create Issues / Actions at Unit Level

Table 1-7 New Features and Enhancements in Release 2404 (continued)

Create issues and actions at Unit level. This helps operators assign issues to units without errors.
Track Round Execution Duration Identify the duration of round execution. This helps users to optimize future rounds.
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.
Maintain Buffer Period for Rounds Add a buffer period for rounds. This helps operators execute rounds even after their due time without the rounds being marked as overdue.
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.
Copy Tasks across Multiple Assets Copy tasks in a round plan to multiple assets or locations with ease. This reduces repetitive work.
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.
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.

Table 1-7 New Features and Enhancements in Release 2404 (continued)

View Unit-Level Issues and Actions View issues and actions at Unit level to ensure right issues are raised on the right units.
Track Round Execution Duration Identify the duration of round execution to optimize future rounds accordingly.
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.

New Features and Enhancements in Release 2403

Table 1-8 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.
Import Round Plans and Tasks Data Eliminate manual data recreation by exporting and importing Round Plans and Tasks data from one environment to another.
Round Plans are automatically updated with templates that are modified

Table 1-8 New Features and Enhancements in Release 2403 (continued)

When a template is updated, associated Round Plans are automatically updated. This helps maintain consistency and accuracy across all plans.
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.
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.
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.
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.
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.
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 1-9 New Features and Enhancements in Release 2402

SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication.
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.
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.
Master Data Management Integration Create and update master data directly within the Connected Worker's platform by utilizing files stored in an FTP server.

New Features and Enhancements in Release 2401

Table 1-10 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.
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.
Add required notes in Shift Handover Reports

Table 1-10 New Features and Enhancements in Release 2401 (continued)

Add and include required notes in the Shift Handover Report.
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.
Acknowledge End User License Agreement Read and acknowledge End User License Agreement when logged into the application for the first time.
Configure Mathematical Formulas for Fields Configure mathematical formulas for fields. These formulas help operators get accurate calculations and enter accurate data.
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 the mRounds Integration Guide.
Deactivate Unnecessary Master Data Deactivate Assets and Locations that are no longer needed.
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.
SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication.

Table 1-10 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 65)*.
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 65)*.

New Features and Enhancements in Release 2312

Table 1-11 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.
View Character Limits for Fields View character limits for each field, enter the right data, and maintain data integrity.
Justify Overdue Rounds When a round goes beyond the due date, specify reasons for the overdue in the comment.
Record Task-Level Date & Timestamp Move between tasks during round execution by marking / recording the date and time for each task individually.
Receive Instant Email Alerts

Table 1-11 New Features and Enhancements in Release 2312 (continued)

• Receive instant emails when an issue or action is created, updated, resolved or closed.
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.
Download User List for a Plant Download the user list from the User Management module and view their assigned roles. For more information, see Onboard Users and Assign Roles *(on page 89)*.
Create and Schedule Ad-Hoc Rounds Create ad-hoc rounds to address emergencies or any unforeseen situations.

New Features and Enhancements in Release 2311

Table 1-12 New Features and Enhancements in Release 2311

Acknowledge Previous Shift Handover Reports Review and acknowledge the previous shift's handover report before starting new rounds. This helps execute rounds with increased efficiency.
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.
Add Real-Time Shift Log Entry Add shift logs with notes and observations to the Shift Handover Report during your shift.
Advanced User Access Control

Table 1-12 New Features and Enhancements in Release 2311 (continued)

Select position and unit while logging in. This syncs the rounds by position and unit and eliminates unnecessary data.
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.
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.
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 77)*.
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 89)*.

New Features and Enhancements in Release 2309 SP04

Table 1-13 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.

New Features and Enhancements in Release 2309 SP03

Table 1-14 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.
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.
Access Plant-Specific Rounds Assign plants to users and ensure secure control over the rounds.
Create Master Data with Unique ID and avoid duplication

Table 1-14 New Features and Enhancements in Release 2309 SP03 (continued)

• 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. For more information, see Create and Manage Master Data *(on page 73)*.

New Features and Enhancements in Release 2309 SP02

Table 1-15 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.
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.
View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency.
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.
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 1-15 New Features and Enhancements in Release 2309 SP02 (continued)

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 85)*.

New Features and Enhancements in Release 2309 SP01

Table 1-16 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.
Enable / Disable application passcode screen Disable application passcode screen when user does not want it and enable network login ID and password to login.
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.
View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency.
Configure Widgets on the Dashboard screen Configure the dashboard widgets that you need and improve monitoring tasks.
Configure the Task Compliance Report

Table 1-16 New Features and Enhancements in Release 2309 SP01 (continued)

Configure Task Compliance Reports, download them with a click and submit them during audits.
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.
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.
Monitor, Improve, and Track Effectively with Comprehensive Rounds Report 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.

New Features and Enhancements in Release 2309

Table 1-17 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.
Access only user group specific rounds Access user group specific rounds for a tailored user experience.
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.

Table 1-17 New Features and Enhancements in Release 2309 (continued)

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.
Attach videos and documents as proofs for tasks 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.
Toggle themes for personalized experience Switch between Dark Mode and Light Mode themes depending on your preferences.
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 97)*.
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.
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 93)*.

Table 1-17 New Features and Enhancements in Release 2309 (continued)

Assign rounds to user groups Assign rounds to user groups when scheduling. Any user from the group will be able to pick up the round task and execute maintenance.
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.
Add additional details for conditional logic Add mandate responses, define a number range, and specify unit of measurement options for tasks in conditional logic.
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.

New Features and Enhancements in Release 2308

Table 1-18 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.
Work on daily Rounds effortlessly with access to Additional Notes and Attachments 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.
Skip Rounds with a Reason

Table 1-18 New Features and Enhancements in Release 2308 (continued)

Skip the round with an appropriate reason when the round is no longer required.
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.
Explore Dashboard with Interactive Graphs and Get Real-time 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.
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.
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.
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.
Add Additional Notes and Attachments to work on rounds effortlessly

Table 1-18 New Features and Enhancements in Release 2308 (continued)

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.

New Features and Enhancements in Release 2306

Table 1-19 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.
Introduced Dashboard • 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.
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.
Enhanced PDF Preview Setup

Table 1-19 New Features and Enhancements in Release 2306 (continued)

• 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.
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.
Enhanced Round Plan Details • 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.
Enhanced Number Response Type Enter decimals and negative values as responses to tasks that have a number response type.
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.
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.

Table 1-19 New Features and Enhancements in Release 2306 (continued)

Assign rounds to plants based on shifts • Create shifts and Assign to Plant Operations. • Schedule rounds by shifts and split slots for improved flexibility and optimized work execution.
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 73)*.
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.
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.
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.
Enhanced PDF Preview Setup 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.

New Features and Enhancements in Release 2305

Table 1-20 New Features and Enhancements in Release 2305

Execute Rounds • Skip non-mandatory tasks from the rounds by selecting a reason.

New Features and Enhancements in Release 2304

Table 1-21 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.
Create, View, Assign, and Close Issues • 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.
Create, View, Assign, and Close Actions

Table 1-21 New Features and Enhancements in Release 2304 (continued)

• 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.
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.
Access the application in offline mode • 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.
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.
Add Response Types and Conditional Logic to Questions

Table 1-21 New Features and Enhancements in Release 2304 (continued)

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.
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.
Track progress of Scheduled Rounds • View Open, To-Do, In-progress, and Submitted rounds. • Download PDF reports of in-progress and Submitted rounds.
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.
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.
Search & Filter • Search & Filter round plans. • Search & Filter rounds. • Search & Filter Archived round plans. • Search, Filter, and view open issues and actions.
Productivity Enhancements

Table 1-21 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.
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 73)*.
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 Plants *(on page 73)*.
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 77)*.
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 82)*.
Add, Search, View, and Edit Global Response Set Data

Table 1-21 New Features and Enhancements in Release 2304 (continued)

- 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 85)*.

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, Onboard Tenants/Super Admins *(on page 65)*.

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 93)*.

2. Integrate mRounds with External Systems

Integrating mRounds with external systems is essential for seamless maintenance operations and data flow across an organization. This chapter provides a comprehensive guide to establishing and configuring connections between mRounds and various external systems, such as FTP servers, ODBC databases, SMTP email servers, and SAP ERP systems.

These integrations enable mRounds to export critical maintenance data, automate notifications, and synchronize real-time information with other platforms. Whether it's transferring rounds results to an FTP server for centralized storage, exporting data to a database for advanced analytics, or integrating with SAP to automate work order creation, these configurations ensure that mRounds fits smoothly into your organization's broader IT landscape.

This chapter has the following topics:

2.1. Establish a Connection with FTP Server for Data Export

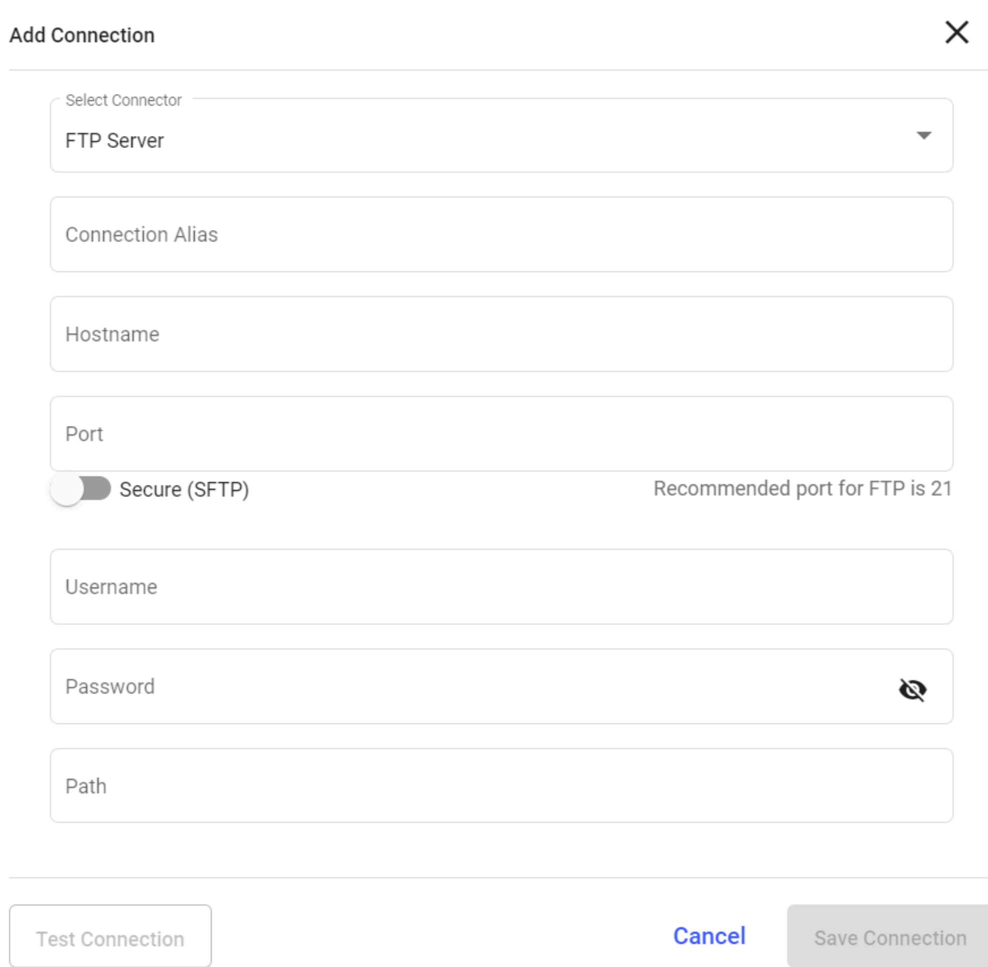
An FTP (File Transfer Protocol) server connection allows mRounds to securely transfer large volumes of data to external systems for reporting, backup, or further processing. Establishing this connection enables the export of rounds data and reports to FTP servers without manual intervention, ensuring a smooth and automated process for data storage and sharing.

- **Automate Data Exports**: Reduces the need for manual transfers by automating the process of exporting rounds data to an external FTP server.
- **Centralized Data Storage**: Ensures that all exported rounds data is available in a secure, centralized location for backup, audits, or further analysis.

To create a connection for FTP server:

1. Click the **Integrations Manager** module on the left side pane.
2. Click the Add button in the **Connections** section on the left side.

Figure 2-1 Create FTP Connection



3. In the **Add Connection** window, do the following:
    a. Select **FTP Server** from the **Select Connector** drop-down.
    b. Enter the connection alias name in the **Connection Alias** field.
    c. Enter the host address in the **Hostname** field.
    d. Enter the port number in the **Port** field.
    e. Enter the username in the **Username** field.
    f. Enter the password in the **Password** field.
    g. Enter the path or location of FTP in the **Path** field.
    h. Click **Test Connection** to test the connection.
    i. Click **Save Connection** if the connection is successful.

The Connection is created successfully and you can see it in the Connections section.

In this section, you can,

- Click the More icon next to the connection and select **View Details** to see the connection details.
- Click the More icon next to the connection and select **Edit Connection** to edit the connection details.
- Click the More icon next to the connection and select **Delete Connection** to delete the connection.

Configure Data Export to FTP for Automated Transfer

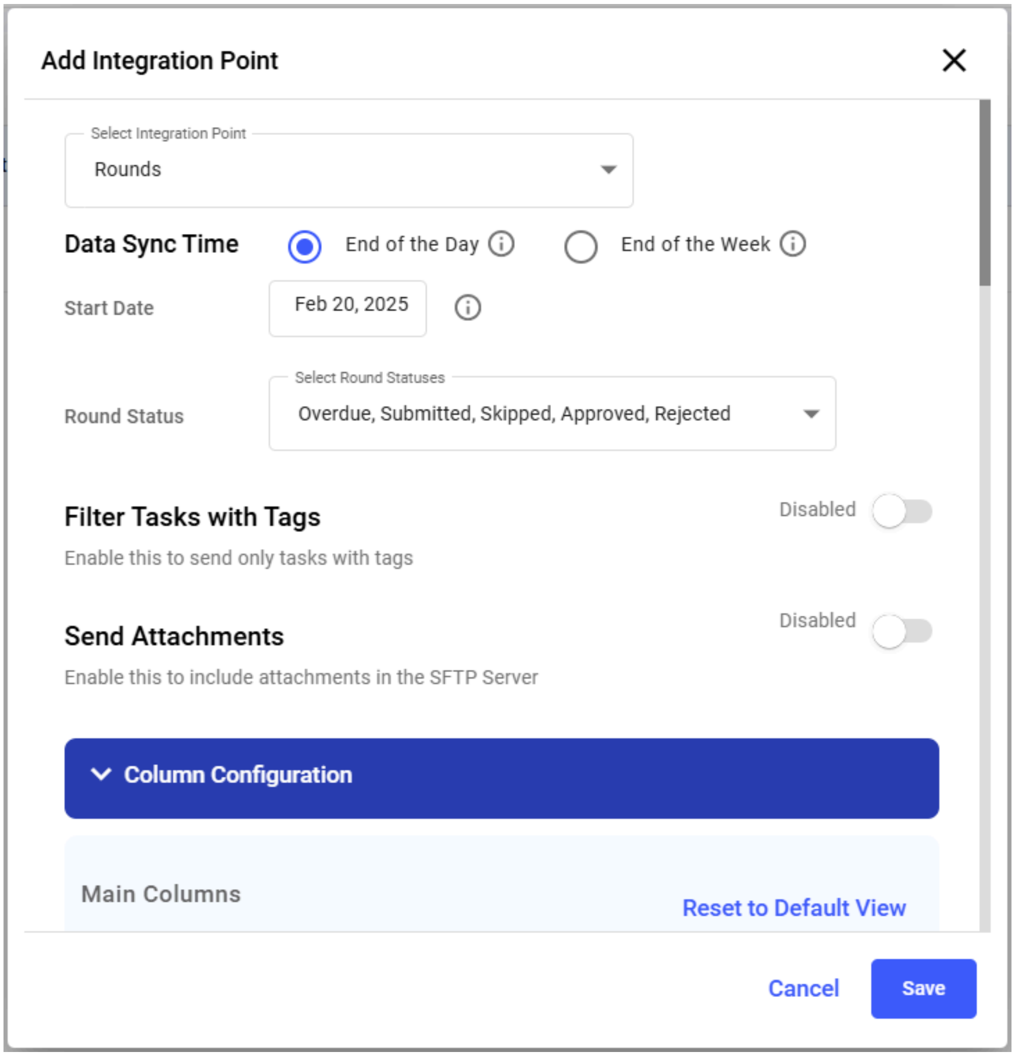
Once a secure connection is established, the next step is to configure mRounds to export data to the FTP server. This setup allows specific types of data such as rounds results, reports, and issues to be automatically exported to the FTP server.

- **Automate Reporting**: Automatically transfer critical data, such as maintenance results and issue logs, to the FTP server for long-term storage.
- **Facilitate Data Sharing**: Enable seamless data sharing between mRounds and other systems that may pull data from the FTP server.

To add an integration to FTP server

1. Click the **Integrations Manager** module on the left side pane.
2. Select the **FTP Server** in the **Connections** section.
3. Click **Add Integration** on the right side.

Figure 2-2 Add Integration Point



4. In the **Add Integration Point** window, do the following:

a. Select the integration point (Rounds) from the **Select Integration Point** drop-down.
b. Choose **End of the Day** or **End of the Week** in the **Data Sync Time** field to create a new .CSV file for each day or week.
c. Select date from the **Start Date**.
d. Enter the number of hours in the **Modify Every <> Hour** field to modify the .CSV file at the end of every day/week based on the selected hours.
e. Enable/Disable the **Filter Tasks with Tags** to send only tasks with/specific tags or with not tags.
f. Expand **Column Configuration** and configure or select the columns such as, Round Plan ID, Round Plan Name, Plant ID, Plant Name, Location ID, Asset ID, Unit, Position, and so on that should be displayed in .CSV file.
g. Click **Save**.

The Integration Point is created and you can view it in the **Integrations** section.

The .CSV file is generated based on data synchronization schedule and stored in the configured FTP location.

2.2. Establish a Connection with ODBC for Database Integration

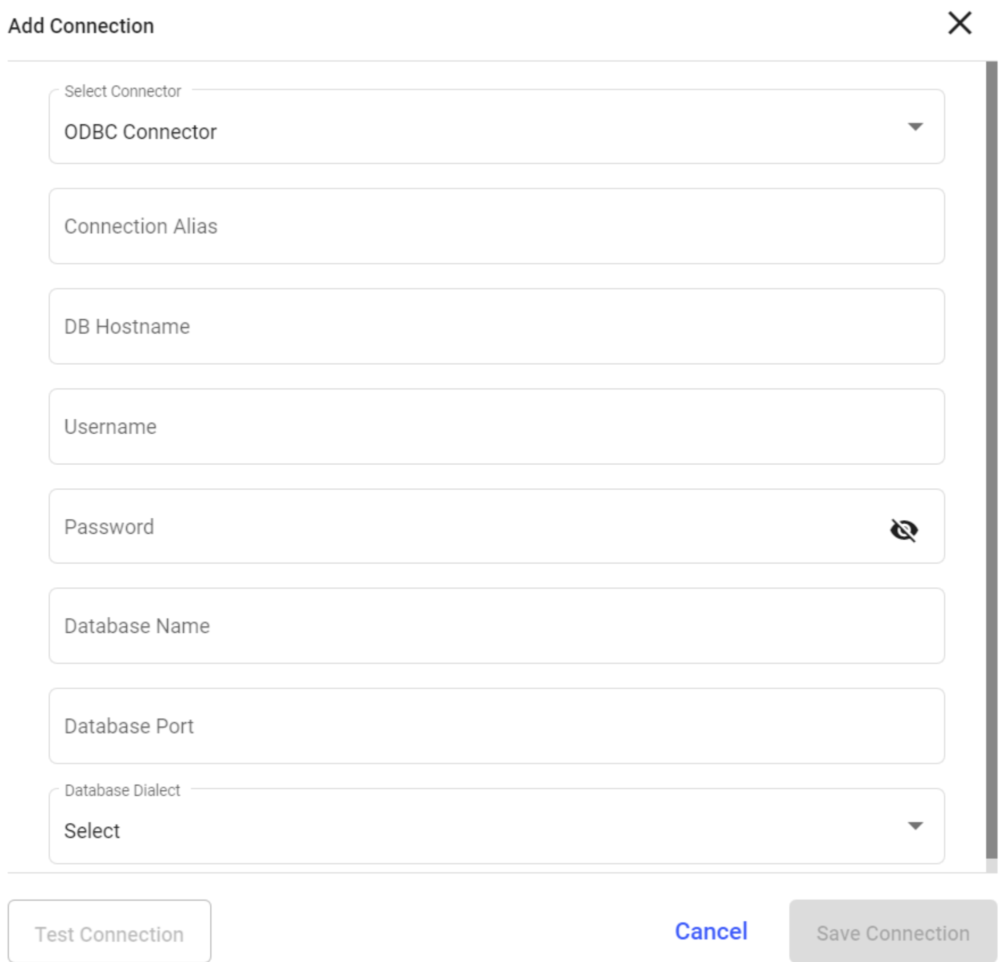
The ODBC (Open Database Connectivity) connector allows mRounds to directly interface with external databases. This connection is crucial for exporting rounds data to an organization's internal databases, enabling further analysis and integration with other systems like reporting tools or custom dashboards.

- **Direct Database Integration**: Streamlines the process of transferring rounds data from mRounds to external databases.
- **Support for Custom Analytics**: Facilitates integration with custom reporting tools and dashboards by allowing direct access to mRounds data.

To create a connection for ODBC connector:

1. Click the **Integrations Manager** module on the left side pane.
2. Click the Add button in the **Connections** section on the left side.

Figure 2-3 Add ODBC Connection



3. In the **Add Connection** window, do the following:
   a. Select **ODBC Connector** from the **Select Connector** drop-down.
   b. Enter the connection alias name in the **Connection Alias** field.
   c. Enter the host address in the **DB Hostname** field.
   d. Enter the username in the **Username** field.
   e. Enter the password in the **Password** field.
   f. Enter the database name in the **Database Name** field.

g. Enter the port number in the **Database Port** field.
h. Select the database type from the **Database Dialect** drop-down.
i. Click **Test Connection** to test the connection.
j. Click **Save Connection** if the connection is successful.

The Connection is created successfully and you can see it in the Connections section.

In this section, you can,

- Click the More icon next to the connection and select **View Details** to see the connection details.
- Click the More icon next to the connection and select **Edit Connection** to edit the connection details.
- Click the More icon next to the connection and select **Delete Connection** to delete the connection.

Configure Data Export to ODBC for Database Storage

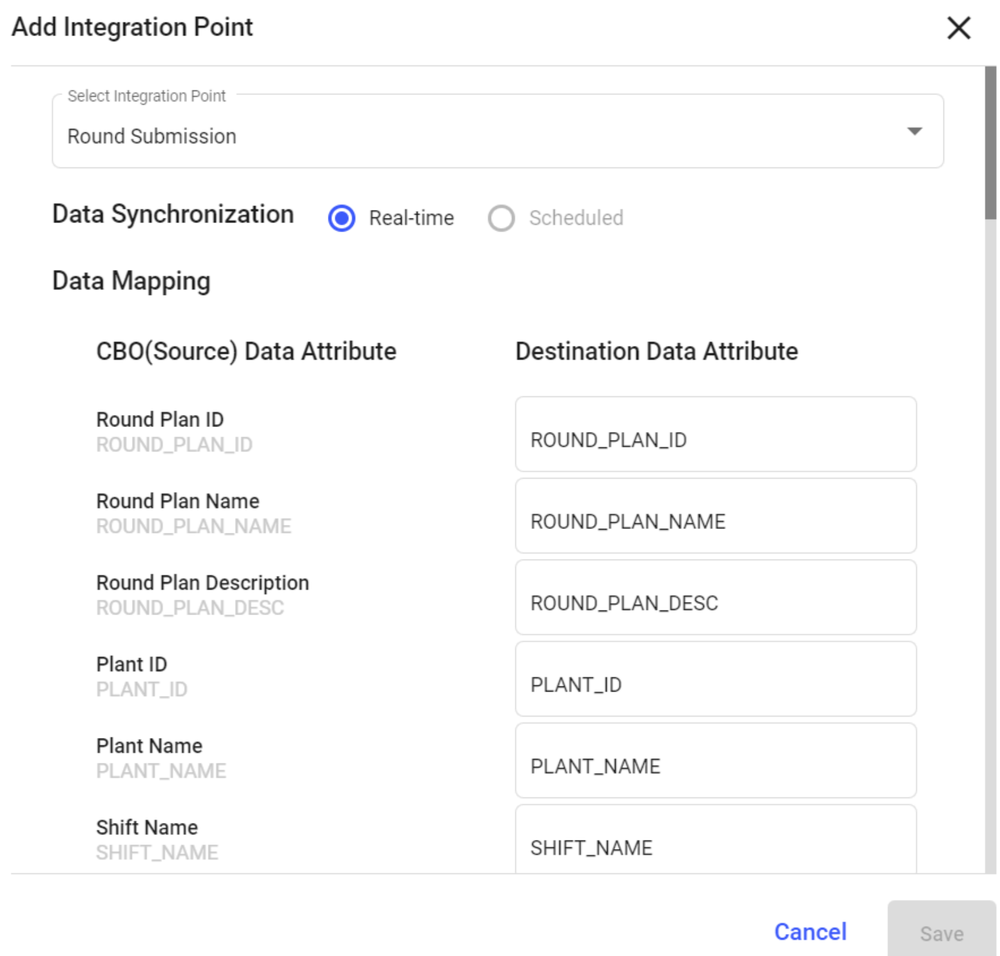
Once the ODBC connection is established, you can configure mRounds to export data directly into your organization's external database. This allows for real-time synchronization between mRounds and your database for further analysis or reporting.

- **Automated Data Synchronization**: Keep your internal database up to date with real-time rounds data from mRounds.
- **Enable Advanced Analytics**: Export data to external databases where advanced analytics can be performed.

To add an integration to ODBC connection:

1. Click the **Integrations Manager** module on the left side pane.
2. Select the **ODBC Connector** in the **Connections** section.
3. Click **Add Integration** on the right side.

Figure 2-4 Add Integration Point



4. In the **Add Integration Point** window, do the following:

a. Select the integration point (Round Submission) from the **Select Integration Point** drop-down.
b. Select **Data Synchronization** as **Real-time** or **Scheduled**.
c. In the **Data Mapping** section, map the CBO (Source) Attributes to Destination Data Attributes.
d. Click **Save**.

The Integration Point is created and you can view it in the **Integrations** section.

The .CSV file is generated based on data synchronization schedule and stored in the configured ODBC location.

2.3. Configure an SMTP Server for Automated Email Notifications

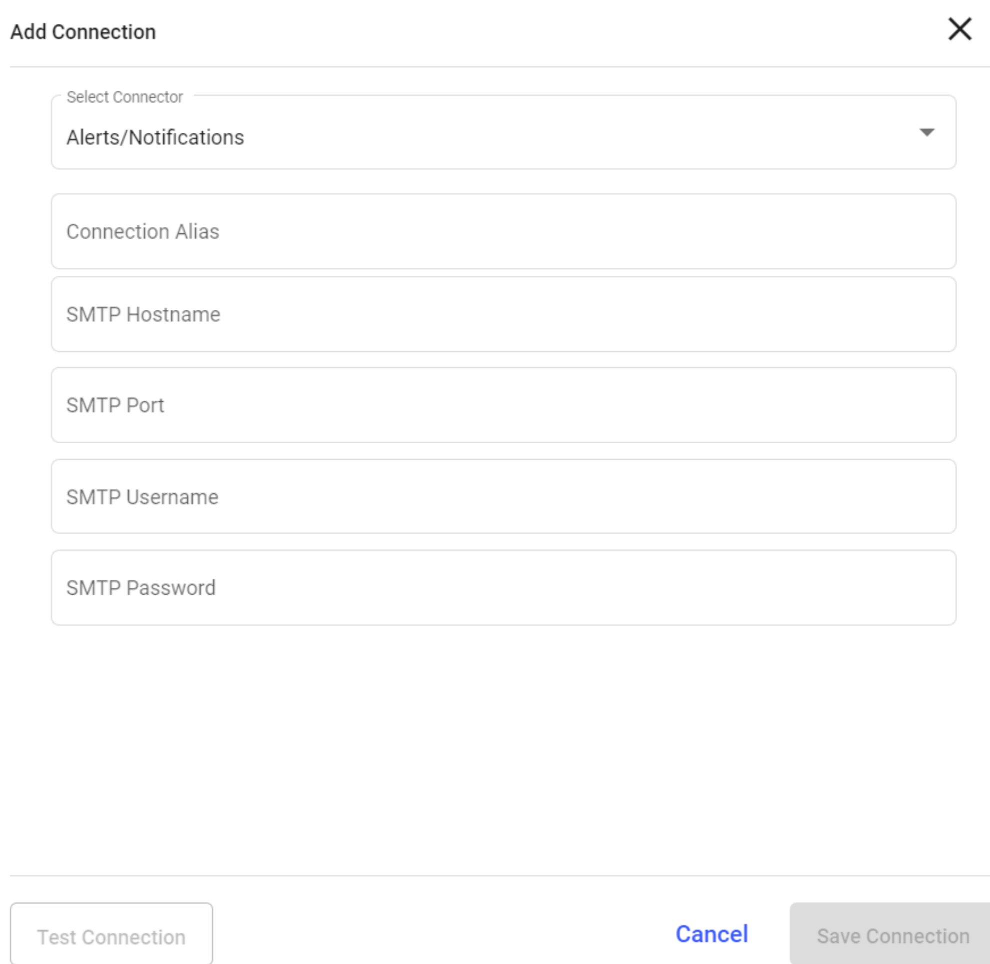
Configuring an SMTP (Simple Mail Transfer Protocol) server allows mRounds to send automated email notifications to stakeholders about task completions, issues, and important updates. This connection ensures timely communication about maintenance operations.

- **Automated Alerts**: Ensure that stakeholders receive real-time notifications regarding critical issues or task completions.
- **Enhance Communication**: Automate the process of sending alerts and updates, reducing manual follow-up.

To create a connection for SMTP server:

1. Click the **Integrations Manager** module on the left side pane.
2. Click the Add button in the **Connections** section on the left side.

Figure 2-5 Add SMTP Connection



3. In the **Add Connection** window, do the following:
   a. Select **Alerts/Notifications** from the **Select Connector** drop-down.
   b. Enter the connection alias name in the **Connection Alias** field.
   c. Enter the host address in the **SMTP Hostname** field.
   d. Enter the port number in the **SMTP Port** field.
   e. Enter the username in the **Username** field.
   f. Enter the password in the **Password** field.
   g. Click **Test Connection** to test the connection.
   h. Click **Save Connection** if the connection is successful.

The Connection is created successfully and you can see it in the Connections section.

In this section, you can,

- Click the More icon next to the connection and select **View Details** to see the connection details.
- Click the More icon next to the connection and select **Edit Connection** to edit the connection details.
- Click the More icon next to the connection and select **Delete Connection** to delete the connection.

Configure Email Notifications with SMTP

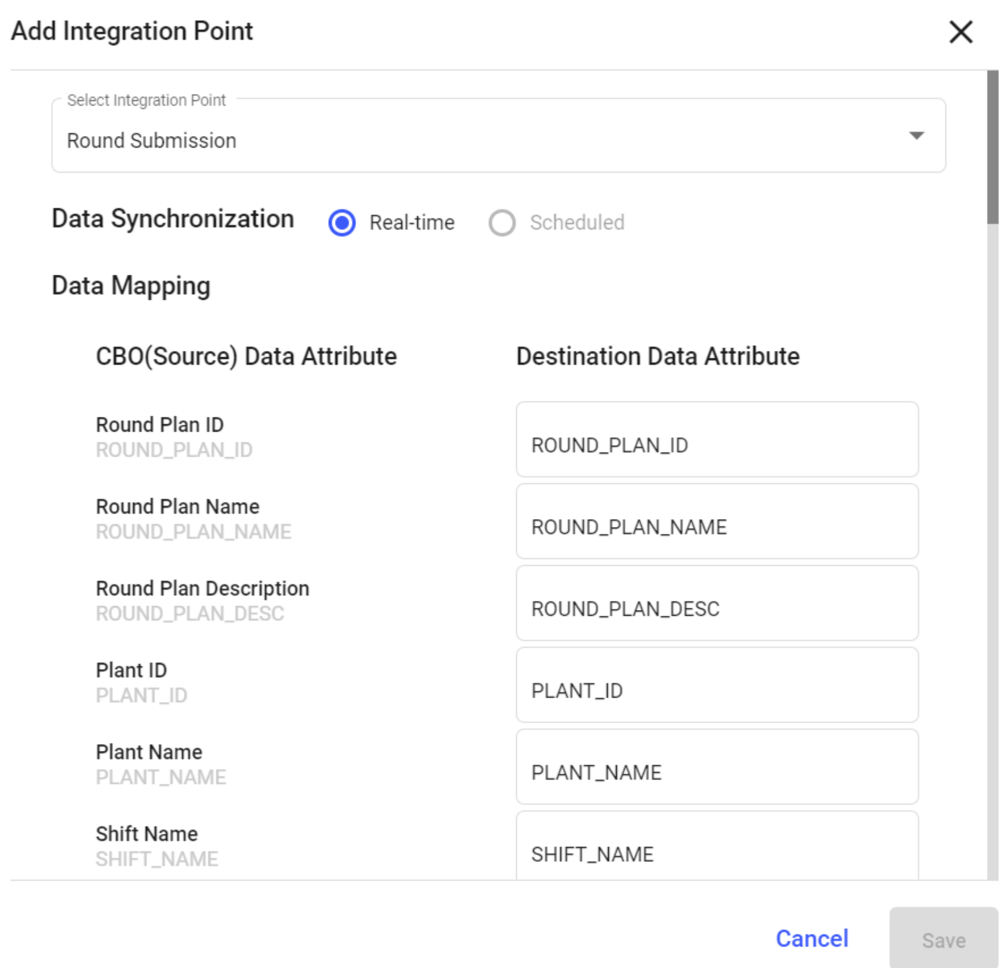
Once the SMTP connection is configured, you can set up automated email notifications to be triggered based on specific events in mRounds, such as issue creation, task completion, or round updates. This ensures timely communication with stakeholders.

1. **Real-Time Notifications**: Automatically notify supervisors, operators, or managers about important updates or issues.
2. **Event-Driven Alerts**: Configure email alerts to trigger when specific events occur, such as task completion or new issues.

To add an integration to SMTP server:

1. Click the **Integrations Manager** module on the left side pane.
2. Select the **SMTP Server** in the **Connections** section.
3. Click **Add Integration** on the right side.

Figure 2-6 Add Integration Point



4. In the **Add Integration Point** window, do the following:

a. Select the integration point (Round Submission) from the **Select Integration Point** drop-down.
b. Select **Data Synchronization** as **Real-time** or **Scheduled**.
c. In the **Data Mapping** section, map the CBO (Source) Attributes to Destination Data Attributes.
d. Click **Save**.

The Integration Point is created and you can view it in the **Integrations** section.

The .CSV file is generated based on data synchronization schedule and stored in the configured SMTP location.

2.4. Establish a Connection with SAP for Data Integration and Rounds Maintenance

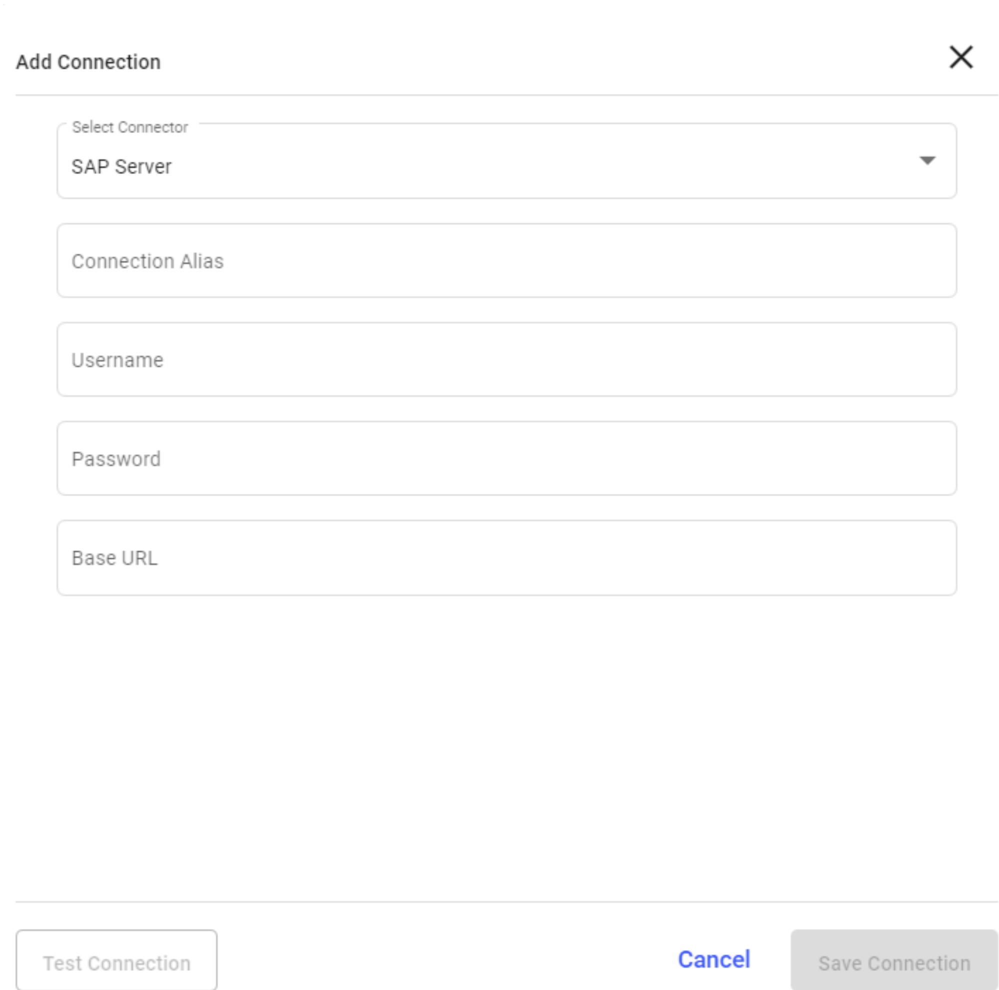
The SAP integration allows mRounds to send critical rounds data directly into an SAP system. This connection is essential for synchronizing maintenance data with the organization's SAP ERP system, enabling automated work order creation and maintenance tracking.

- **Automate Work Orders**: Send rounds results directly to SAP to automatically generate work orders for equipment that needs servicing.
- **Ensure Data Synchronization**: Keep SAP up to date with real-time maintenance data from mRounds, ensuring comprehensive asset tracking and reporting.

To create a connection for SAP server:

1. Click the **Integrations Manager** module on the left side pane.
2. Click the Add button in the **Connections** section on the left side.

Figure 2-7 Add SAP Connection



3. In the **Add Connection** window, do the following:

a. Select **SAP Sever** from the **Select Connector** drop-down.
b. Enter the connection alias name in the **Connection Alias** field.
c. Select the value from the **Authorization** drop-down such as, Basic, Certificate, and API Key.

> **Note:**
> Fill the remaining fields that are displayed based on the selected value in the Authorization drop-down.

d. Click **Test Connection** to test the connection.
e. Click **Save Connection** if the connection is successful.

> **Note:**
> The connection will be successful only if there is no existing master data in the application.

The Connection is created successfully and you can see it in the Connections section.

In this section, you can,

- Click the More icon next to the connection and select **View Details** to see the connection details.
- Click the More icon next to the connection and select **Edit Connection** to edit the connection details.
- Click the More icon next to the connection and select **Delete Connection** to delete the connection.

Configure Data Synchronization with SAP for Automated Maintenance

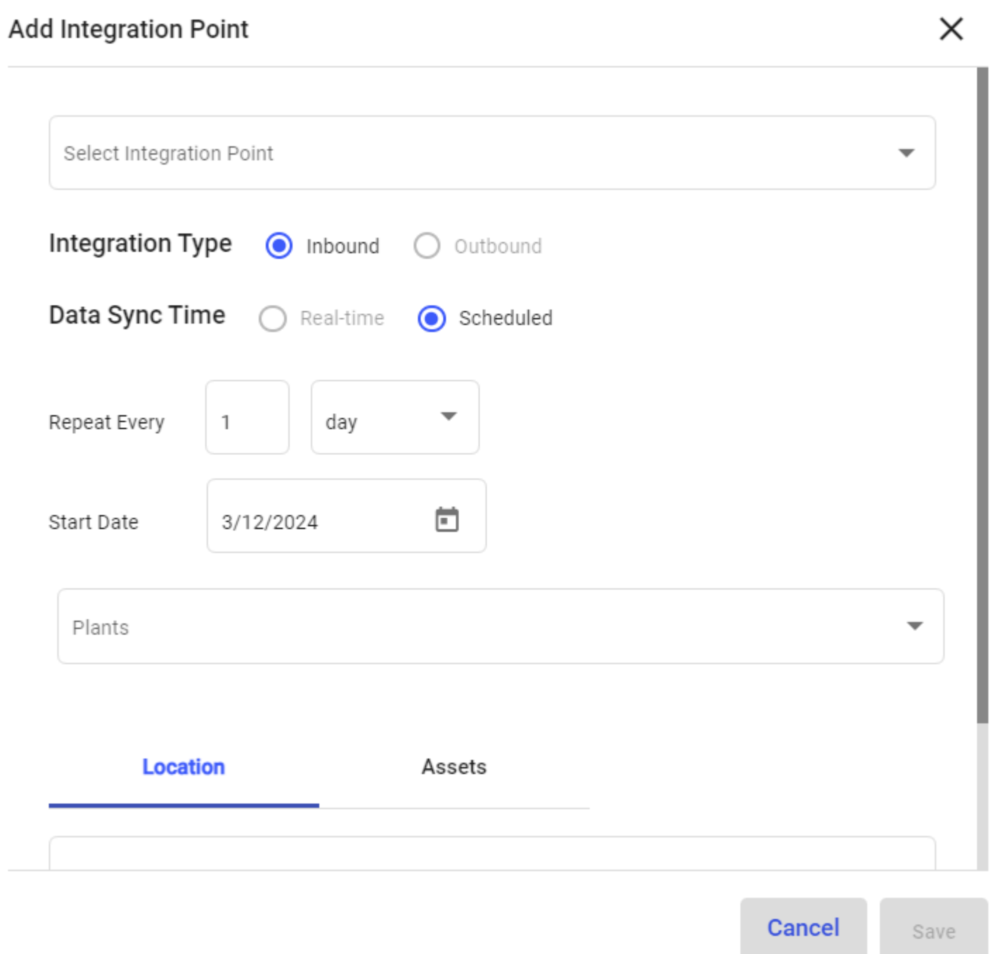
Once connected to SAP, you can configure mRounds to automatically send rounds data, asset status, and issue logs to the SAP system. This integration helps generate work orders, track asset health, and streamline the entire maintenance process.

- **Seamless Work Order Generation**: Automatically create work orders in SAP based on the results of completed rounds.
- **Improved Maintenance Tracking**: Keep SAP updated with real-time asset data, allowing for better monitoring and decision-making.

To add an integration to SAP:

1. Click the **Integrations Manager** module on the left side pane.
2. Select the **SAP Server** in the **Connections** section.
3. Click **Add Integration** on the right side.

Figure 2-8 Add Integration Point



4. In the **Add Integration Point** window, do the following:
   a. Select the integration point (Master Data) from the **Select Integration Point** drop-down.
   b. Select **Integration Type** as **Inbound**.
   c. Select **Data Synchronization** as **Scheduled**.
   d. Select **Repeat Every <number> <day, week, month or year>**.
   e. Select **Start Date**.

f. Select plant from the **Plants** drop-down where the location or asset residing.
g. In the **Location or Assets** tab, enter the collection in the **URL** field.
h. In the **Column Configuration** section, map the CBO data columns to SAP data columns.
i. Click **Save**.

The Integration Point is created and you can view it in the **Integrations** section.

The master data synchronization in the application occurs based on the configured schedule. You can also sync the data manually.

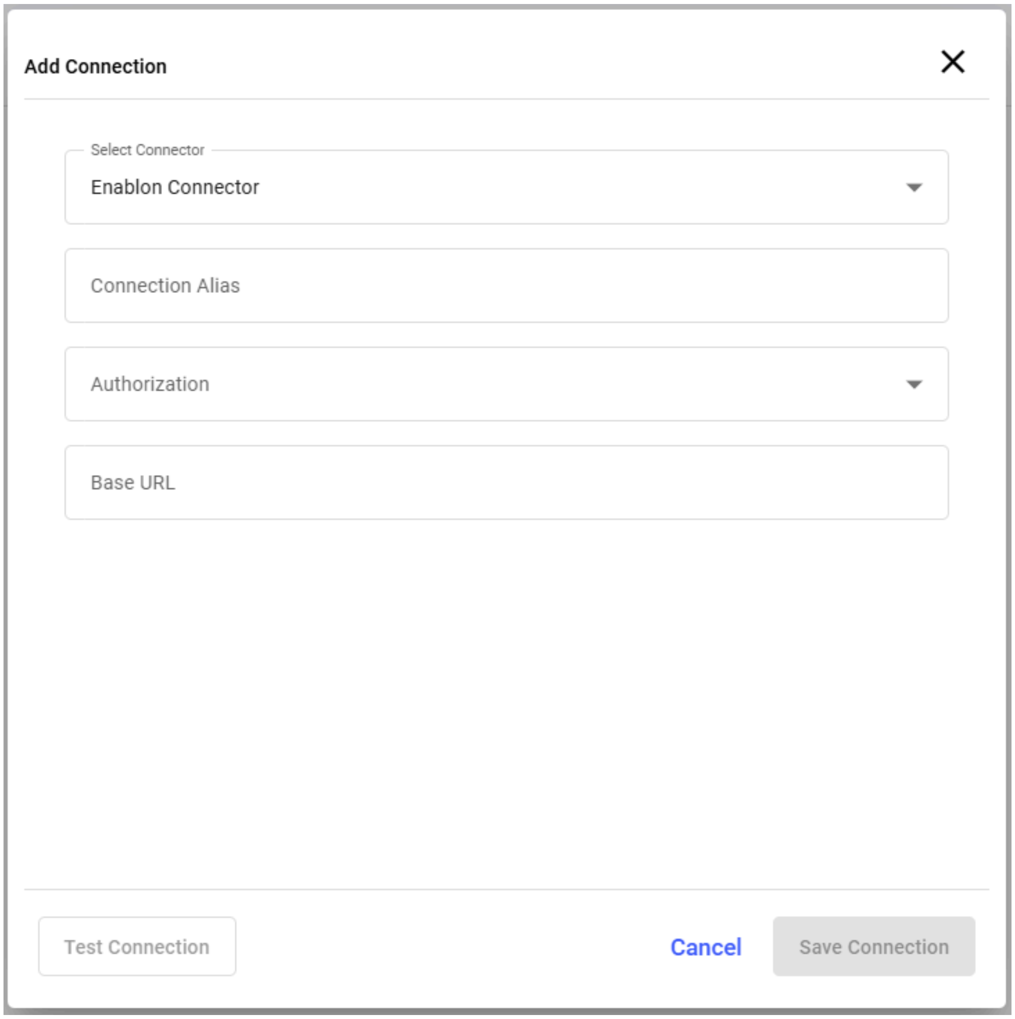
2.5. Establish a Connection with Enablon for EHS Incident Management

If an Environment, Health, and Safety (EHS) issue is raised in the mRounds application, the details are automatically transferred to the Enablon incident management tool, creating a corresponding event. Additionally, if an SAP notification is generated for the same issue, mRounds sends the notification number along with the issue details to Enablon.

To create a connection for Enablon connector:

1. Click the **Integrations Manager** module on the left side pane.
2. Click the Add button in the **Connections** section on the left side.

Figure 2-9 Add Enablon Connection



3. In the **Add Connection** window, do the following:

a. Select **Enablon Connector** from the **Select Connector** drop-down.
b. Enter the connection alias name in the **Connection Alias** field.
c. Select the value from the **Authorization** drop-down such as, Basic, Certificate, and API Key.

> **Note:**
> Fill the remaining fields that are displayed based on the selected value in the Authorization drop-down.

d. Click **Test Connection** to test the connection.
e. Click **Save Connection** if the connection is successful.

> **Note:**
> The connection will be successful only if there is no existing master data in the application.

The Connection is created successfully and you can see it in the Connections section.

In this section, you can,

- Click the More icon next to the connection and select **View Details** to see the connection details.
- Click the More icon next to the connection and select **Edit Connection** to edit the connection details.
- Click the More icon next to the connection and select **Delete Connection** to delete the connection.

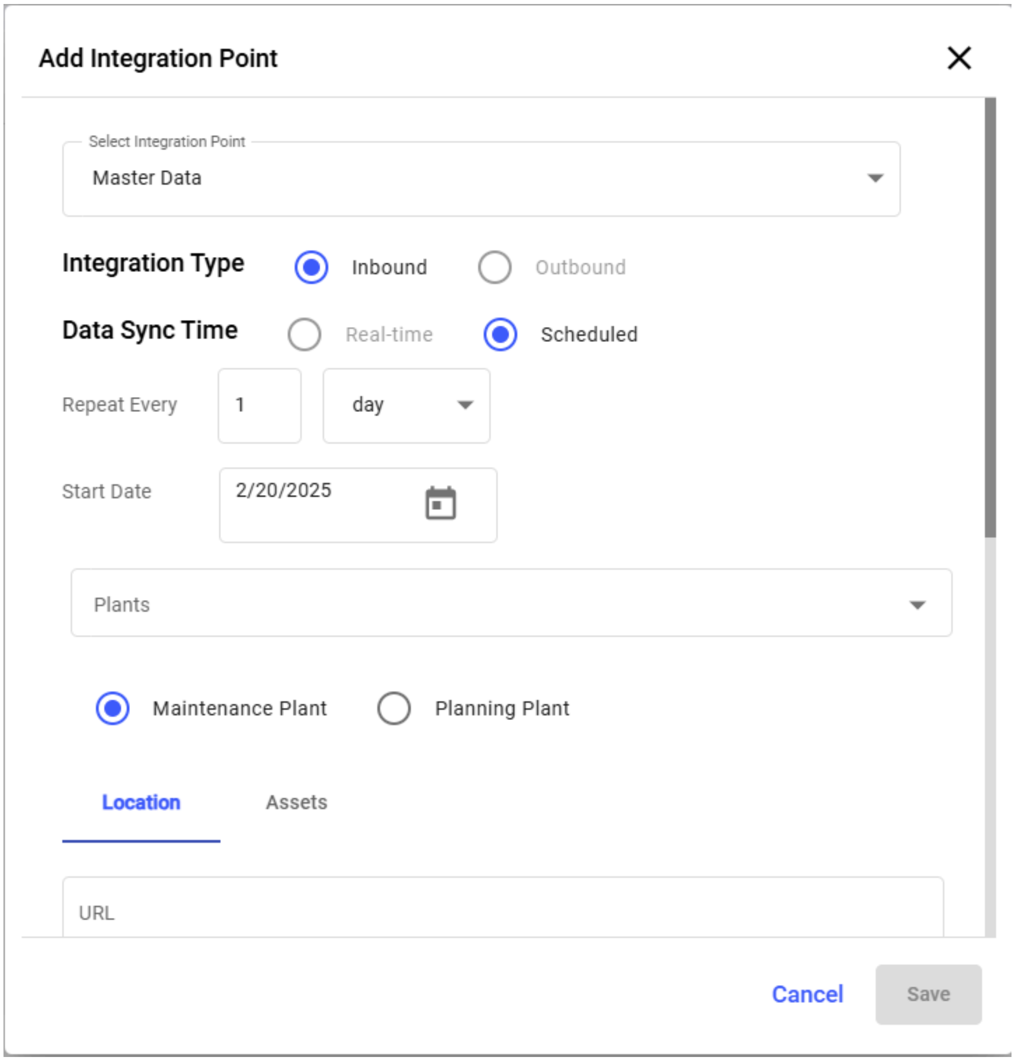
Configure EHS Notifications with Enablon

Once connected to Enablon, you can configure mRounds to automatically send EHS incident notifications to Enablon incident management tool. This streamlines data transfer, improves accuracy, and enhances real-time tracking and compliance.

To add an integration to Enablon:

1. Click the **Integrations Manager** module on the left side pane.
2. Select the **EHS Connection** in the **Connections** section.
3. Click **Add Integration** on the right side.

Figure 2-10 Add Integration Point



4. In the **Add Integration Point** window, do the following:
   a. Select the integration point (Master Data) from the **Select Integration Point** drop-down. and tap **Done**.
   b. Select **Integration Type** as **Inbound**.
   c. Select **Data Synchronization** as **Scheduled**.
   d. Select **Repeat Every <number> <day, week, month or year>**.
   e. Select **Start Date**.
   f. Select plant from the **Plants** drop-down where the location or asset residing.

g. In the **Location** tab, enter the collection in the **URL** field.
h. In the **Column Configuration** section, map the CBO data columns to SAP data columns.
i. In the **Assets** tab, enter the collection in the **URL** field.
j. In the **Column Configuration** section, map the CBO data columns to SAP data columns.
k. Click **Save**.

The Integration Point is created and you can view it in the **Integrations** section.

The master data synchronization in the application occurs based on the configured schedule. You can also sync the data manually.

3. Onboard 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.

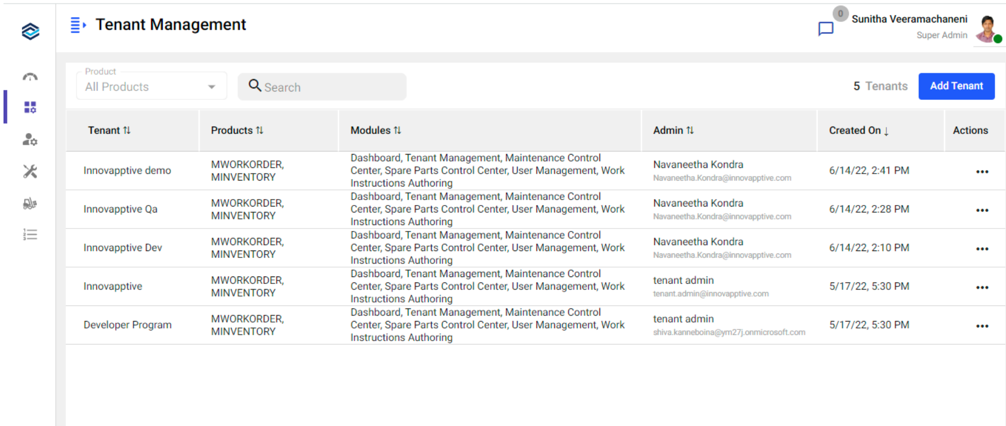
3.1. Create Tenant/Super Admin role

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.

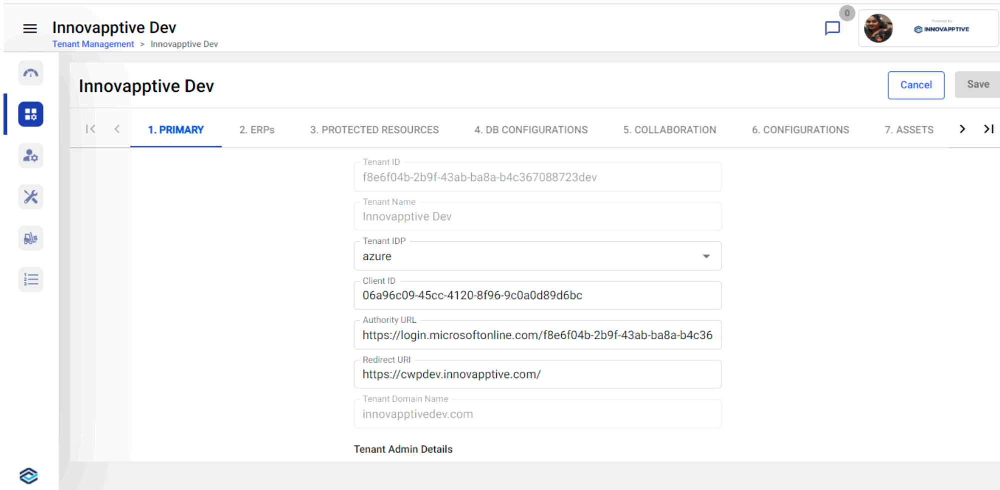
Figure 3-1 Tenant Management Module



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**.

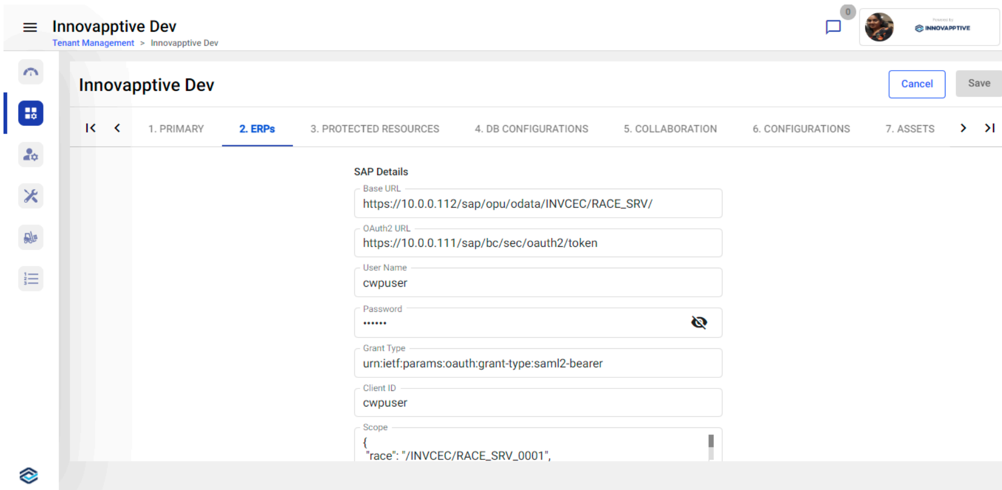
> **Note:**
> The email is valid based on the selected **Tenant IDP**.

Figure 3-2 Add Tenant Primary Details



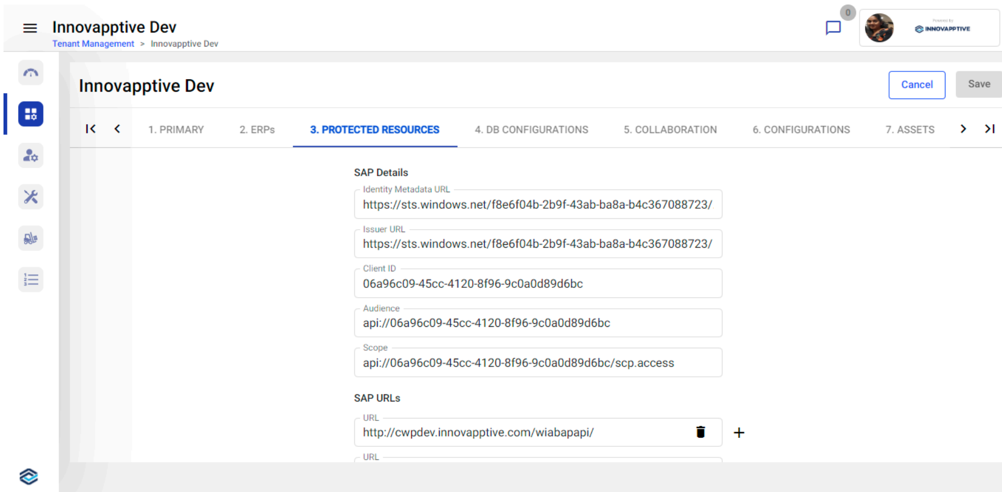
4. In the **ERPs** tab, do the following:
    a. In the **SAP Details** section, enter the following:
        i. **Base URL** – enter the relevant URL.
        ii. **OAuth2 URL** – enter the relevant URL.
        iii. **User Name** – enter the customer username.
        iv. **Password** – enter the customer 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 3-3 Add Tenant ERP Details



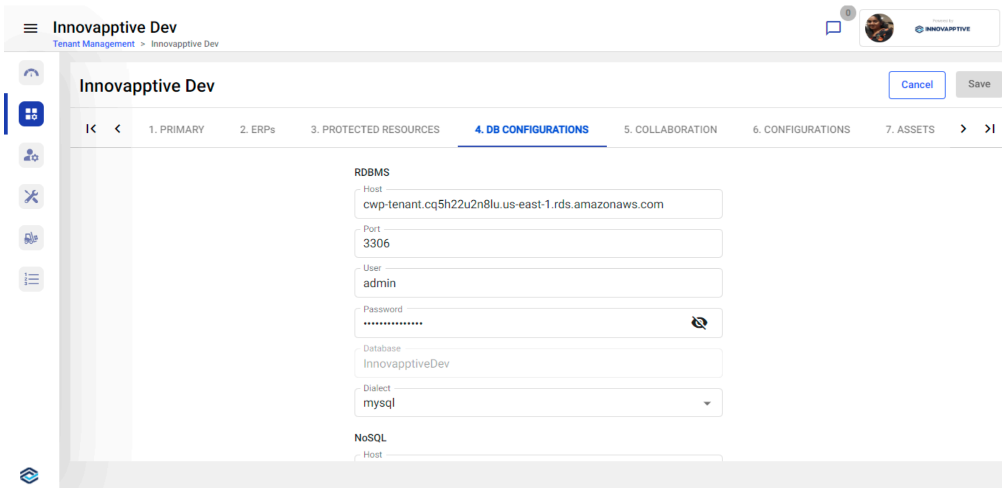
5. In the **Protected Resources** tab, do the following:
   a. In the **SAP Details** section, enter the following:
      i. **Identity Metadata URL** – enter the metadata URL.
      ii. **Issuer URL** – enter the issuer URL.
      iii. **Client ID** – enter the client id.
      iv. **Audience** – enter 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 3-4 Add Tenant Resources Details

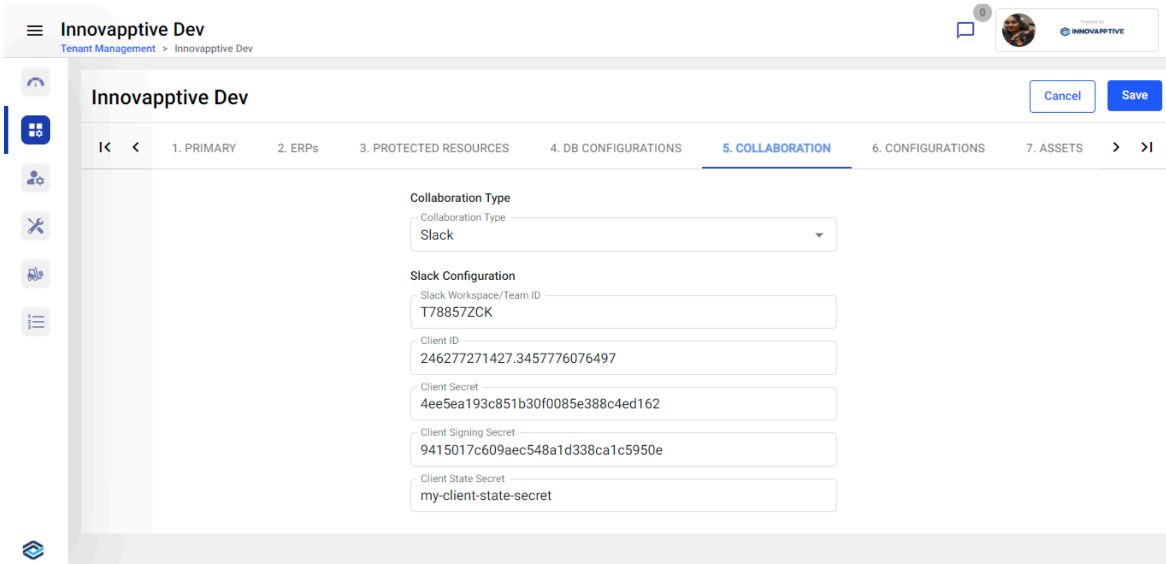


6. In the **DB Configurations** tab, enter the following:
   a. In the **RDBMS** section, enter the following:
      i. **Host** – enter the database host.
      ii. **Port** – enter the port number.
      iii. **User** – enter the username.
      iv. **Password** – enter the password.
      v. **Database** – 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 3-5 Add Tenant Database Details

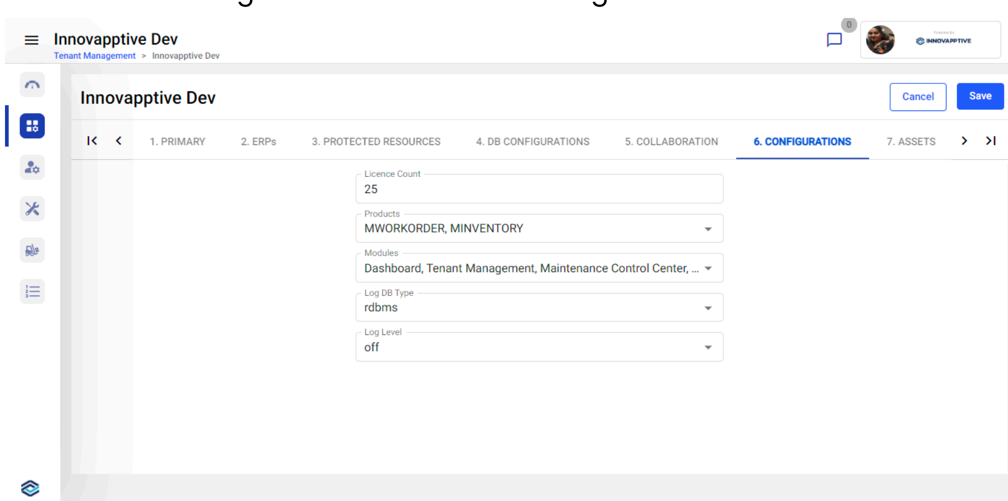


7. In the **Collaboration** tab, enter the following:
   a. **Collaboration Type** – select a collaboration type Slack or MS Teams to connect to the external chat application.
   b. If the **Collaboration Type** is **Slack**, enter the following:
      i. **Slack Workspace/Team ID**: enter slack workspace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



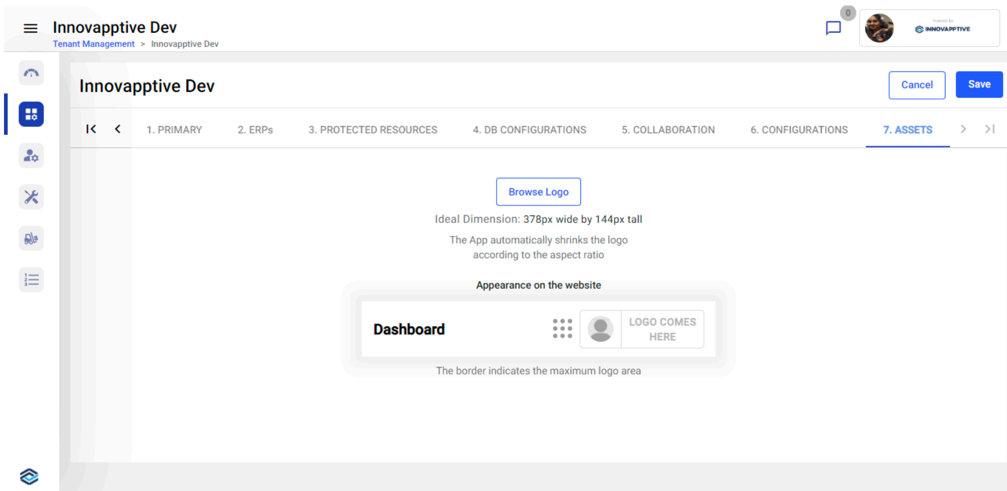
8. In the **Configurations** tab, enter the following:
    a. **License Count** – enter the count of the licenses that are provided to the tenant.
    b. **Products** – select the products that are assigned to the tenant from the drop down.
    c. **Modules** – select the modules that are assigned to 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 3-6 Add Tenant Configuration Details



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

Figure 3-7 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.

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.

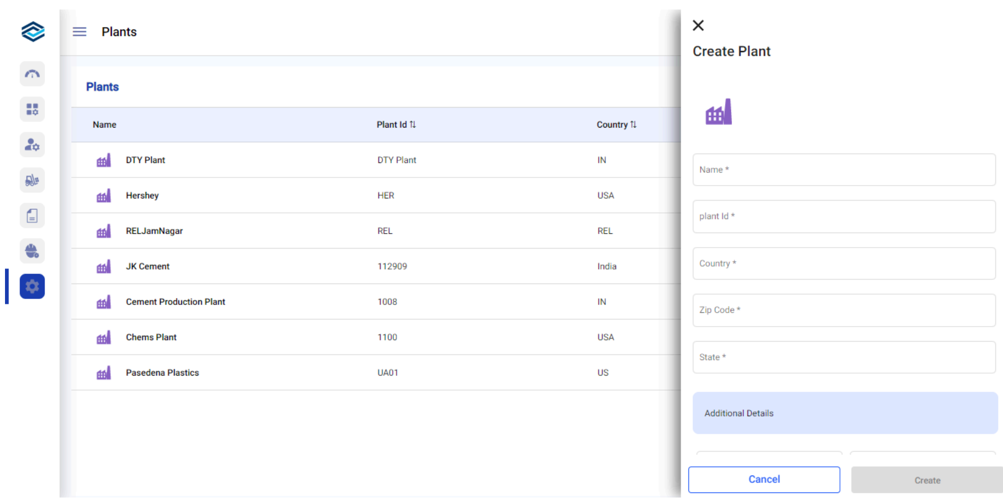
To create or add a plant:

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**, **Report Type**, 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**.

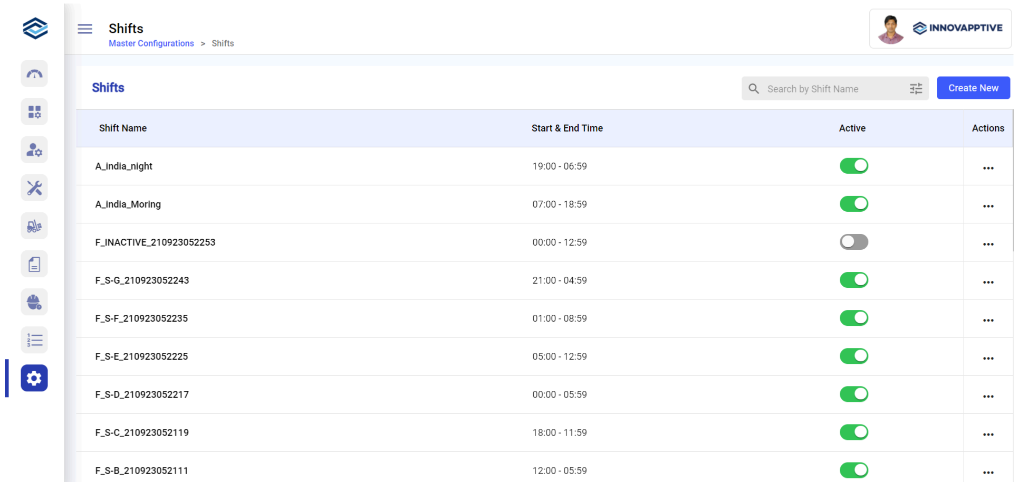
4.2. Create Shifts

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:

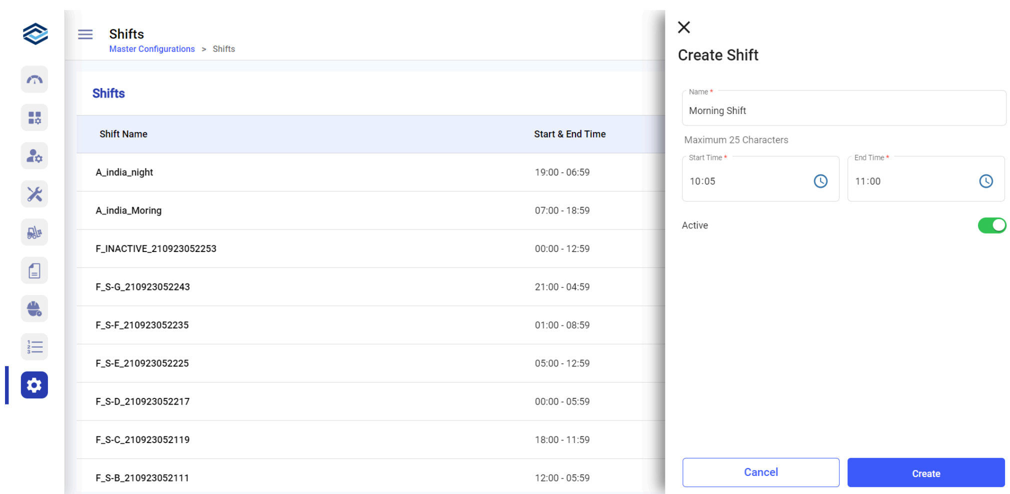
1. Click the **Master Configuration** module on the left side pane and click **Shifts**.

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

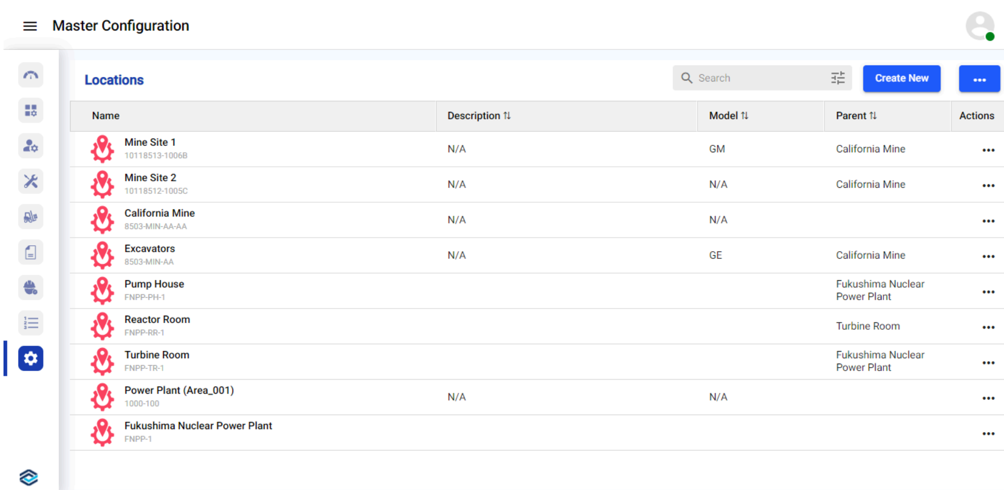
Locations represent specific areas within a plant where assets and maintenance activities are managed. For example, a plant may have locations such as Production Floor, Warehouse, or Cooling Unit Area. Defining locations allows for better tracking of assets, and maintenance tasks in a structured manner.

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

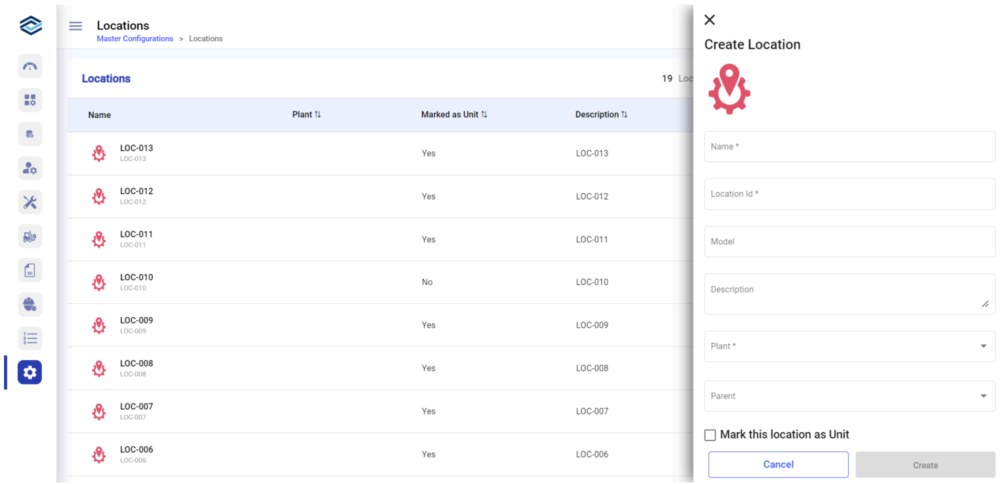
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   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

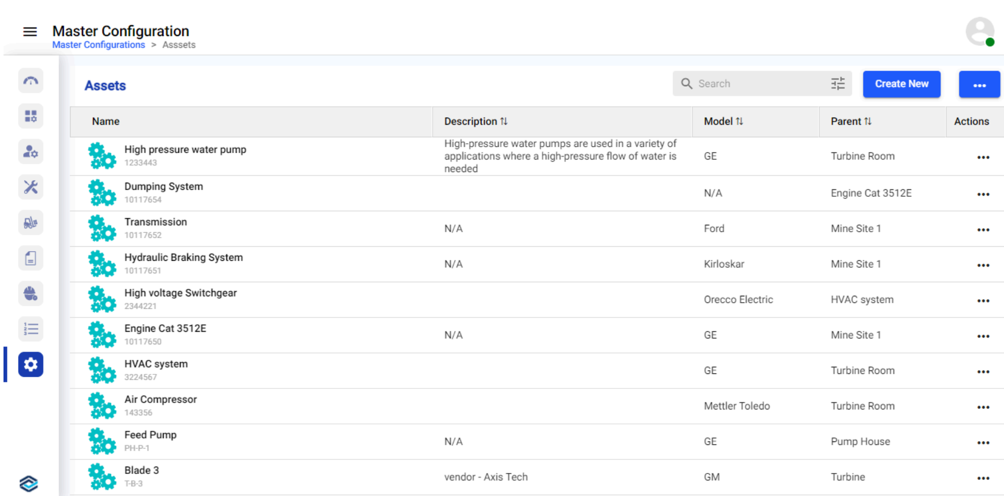
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   Or

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

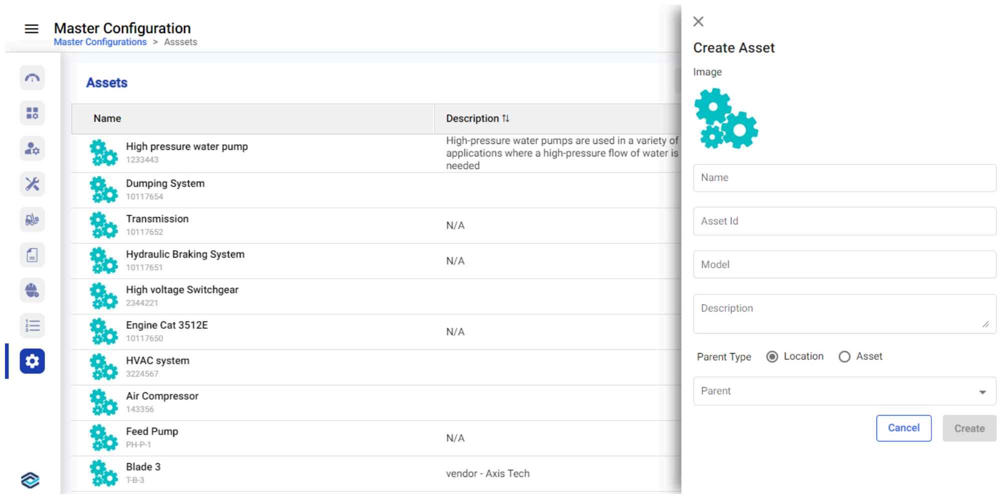
   > **Note:**
   > There should not be any existing master data to sync the data.

   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.

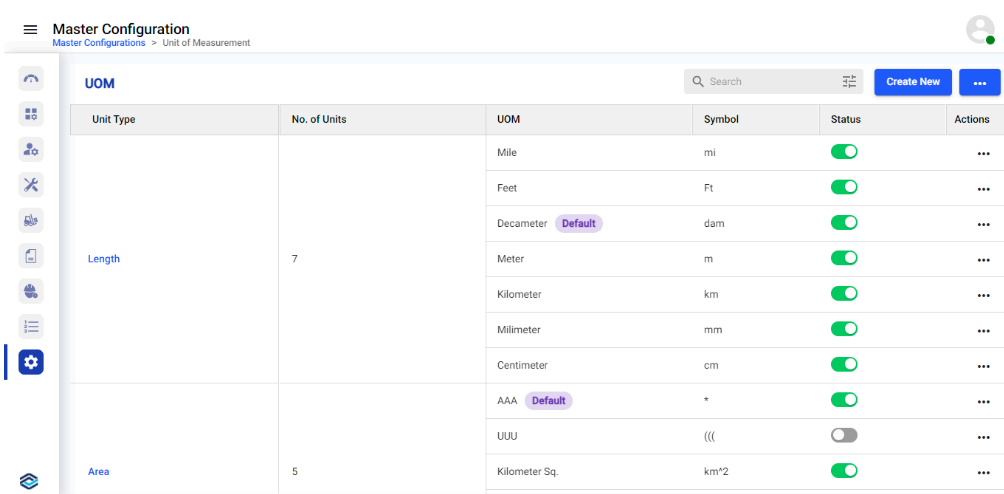
4.5. Create Unit of Measurement

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:

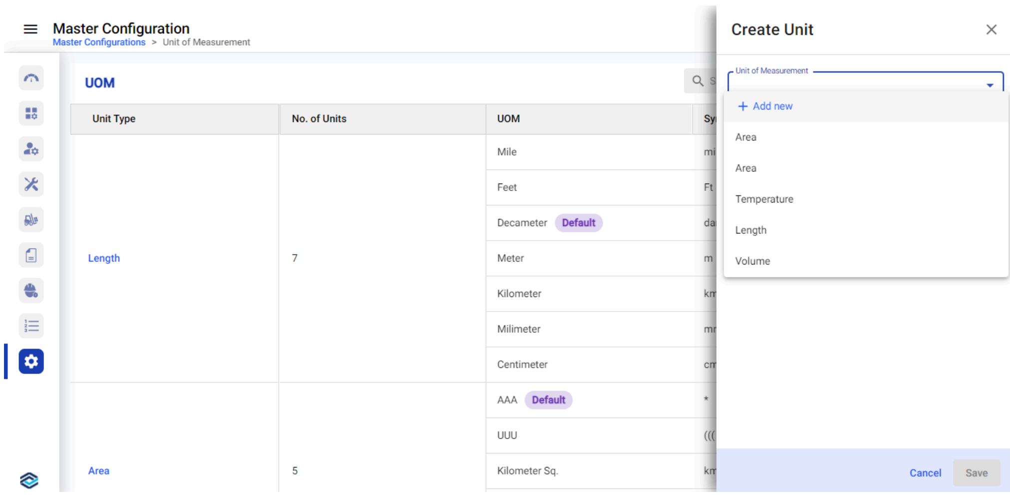
1. Click the **Master Configuration** module on the left side pane and click **Unit of Measurement**.

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.

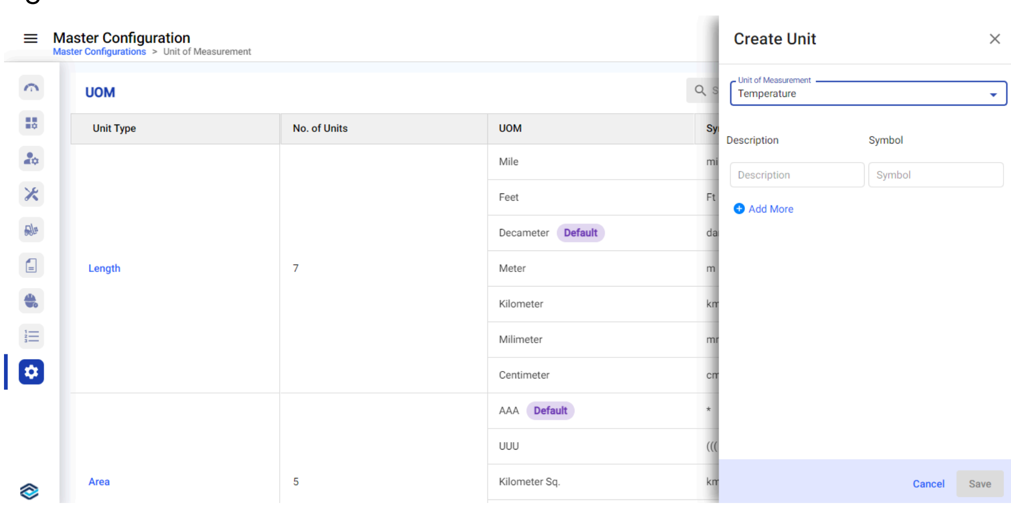
Figure 4-10 Create UOM



> **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**.

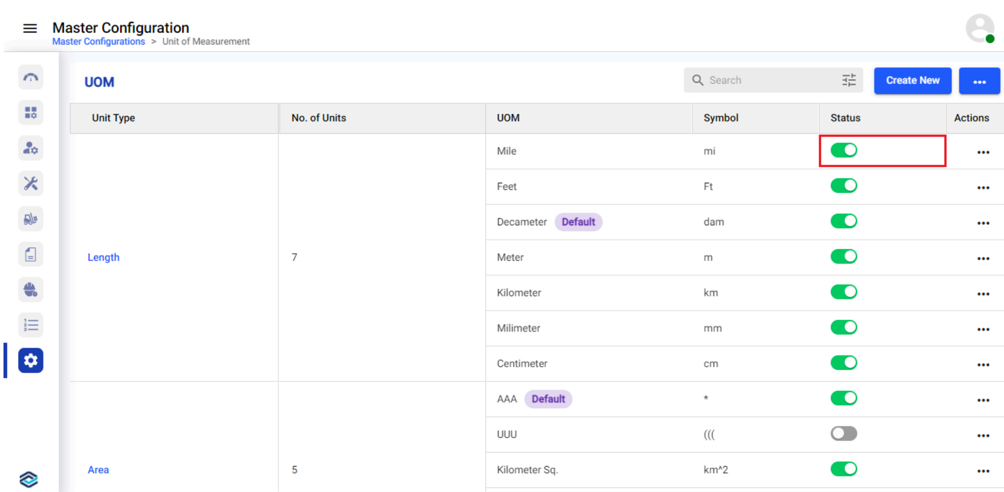
4.5.1. Activate and Deactivate Unit of Measurement

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



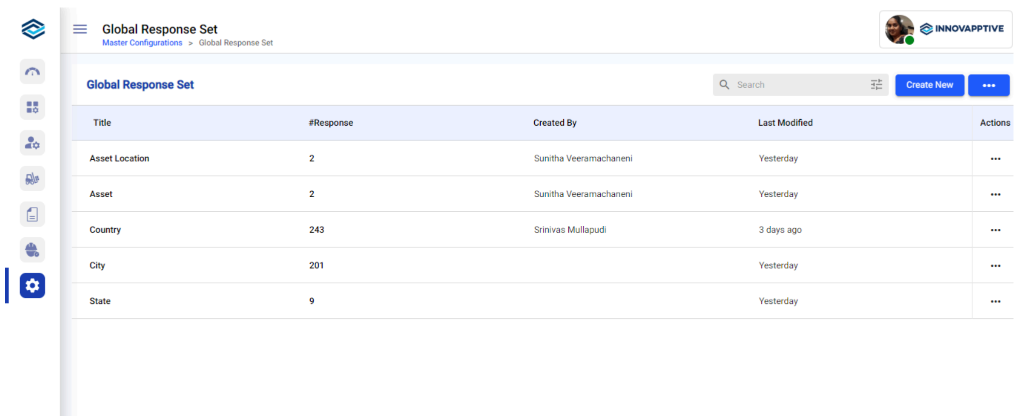
4.6. Create Global Response Set

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:

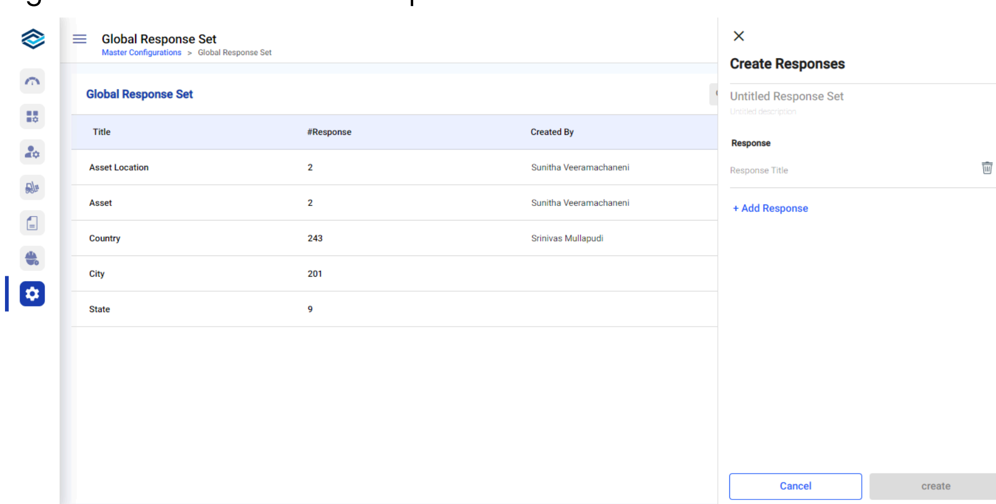
1. Click the **Master Configuration** module on the left-side pane and click **Global Response Set**.

   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. Onboard Users and Assign 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.

5.1. Create Positions

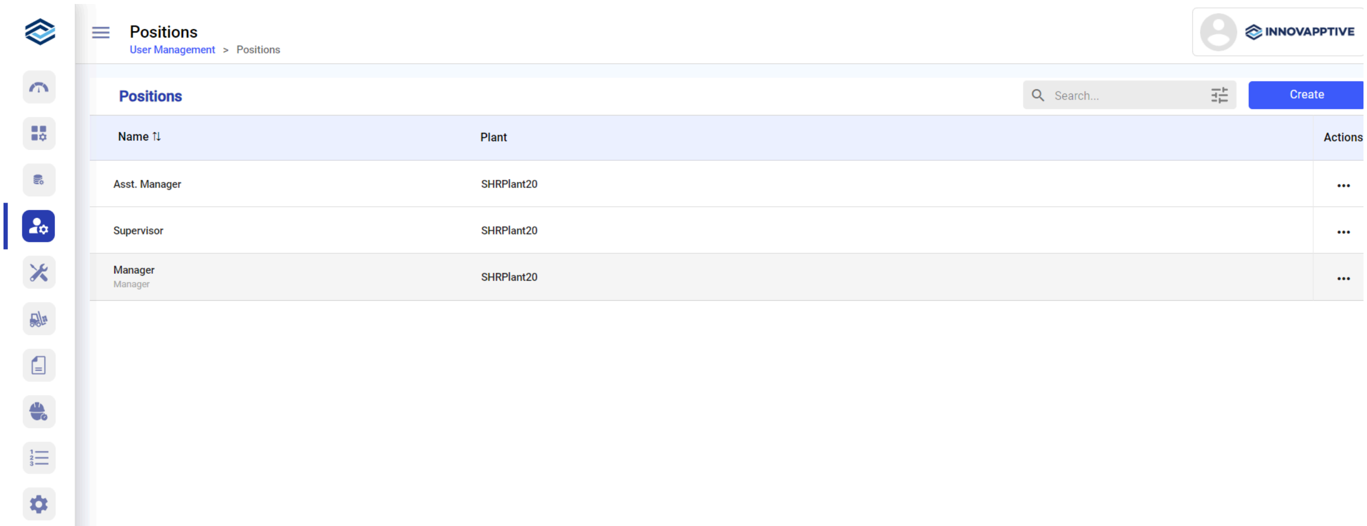
Create positions like manager, supervisor and so on and assign users to them.

To create a position:

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

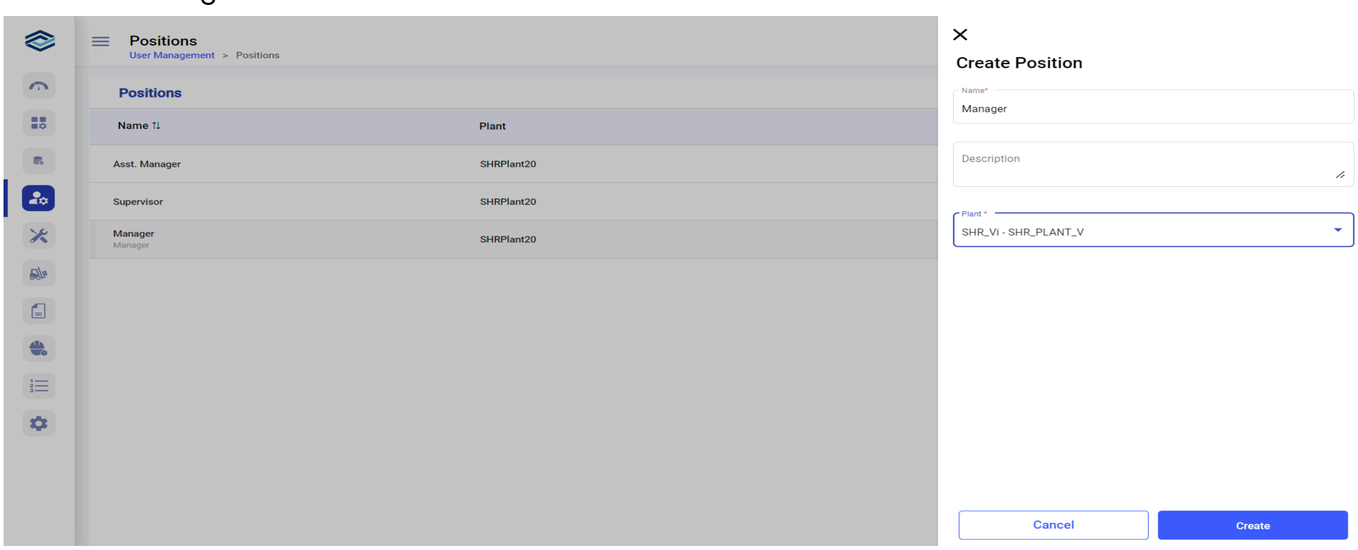
> **Note:**
>
> To see the Create Positions module, click the Hamburger menu on the top left and then click the Expand icon next to User Management.

Figure 5-1 Positions Screen



2. In the **Positions** screen, click the **Create** button on the top right.

Figure 5-2 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.

5.2. Create Roles and Assign Permissions

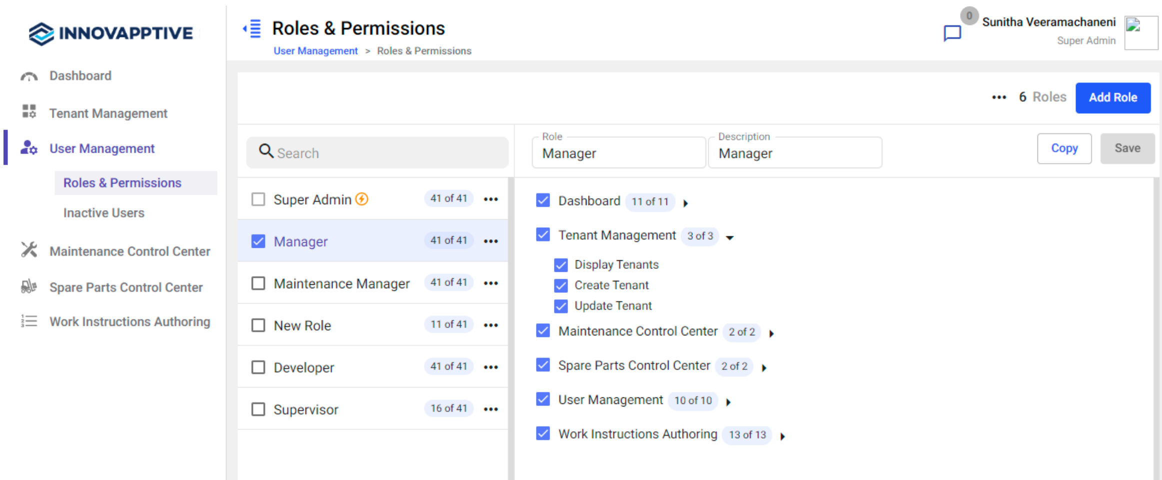
Roles and Permissions define **who can access what** within the system, ensuring secure and efficient workflow management. By assigning roles such as **Super Admin**, **Admin**, **Supervisor**, **Manager**, **Operator**, and **Technician**, you can control user access based on job responsibilities.

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:

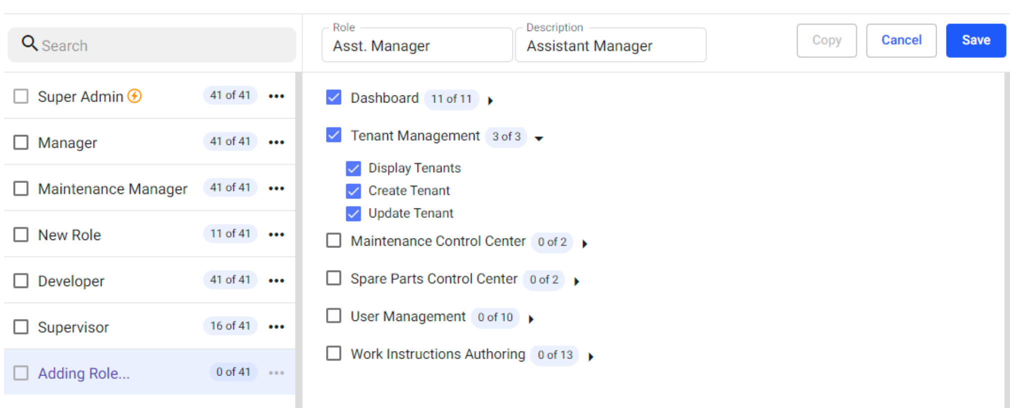
1. Expand the **User Management** module and select **Roles and Permissions** on the left-side menu.

Figure 5-3 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 5-4 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.

5.3. Create Users and Assign Roles

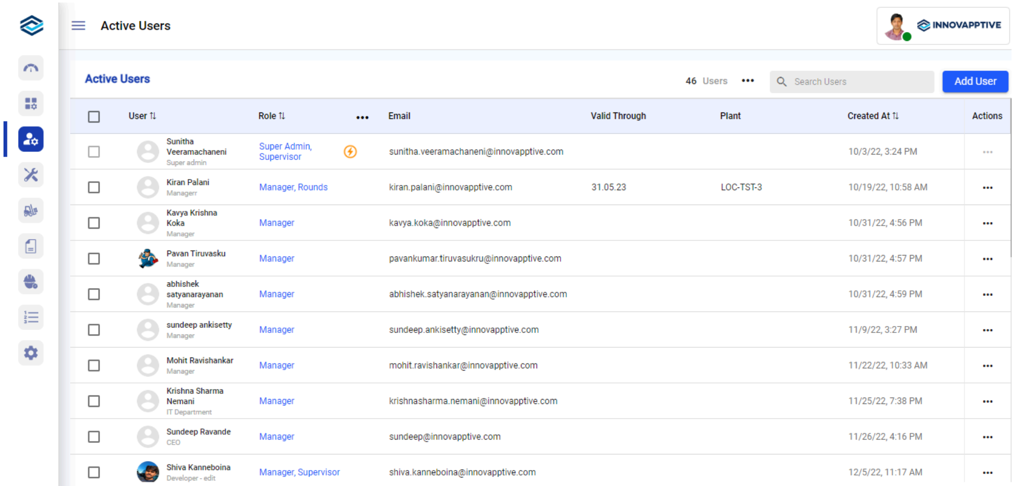
Creating users allows you to add personnel to the system and assign them appropriate roles and permissions. When adding a new user, you define their role (such as Supervisor, Technician, or Manager) and configure their access permissions based on the modules they need.

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 5-5 User Management Module



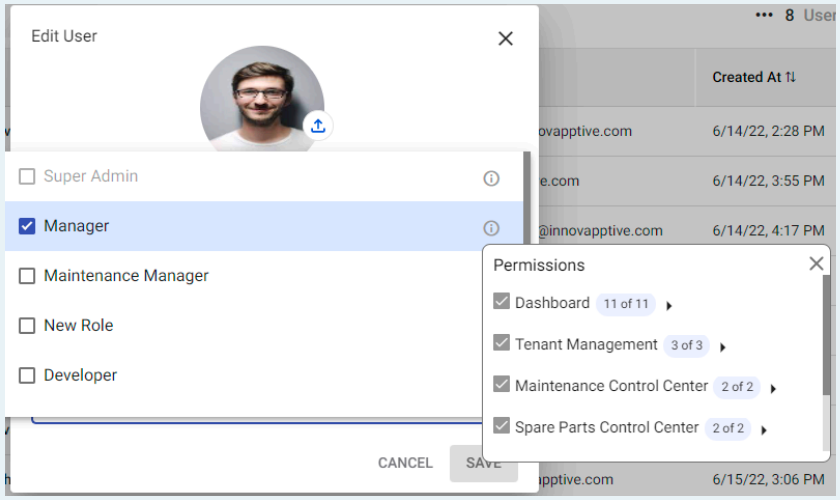
2. In the **Active Users** screen, click the **Add User** button on top right.
3. In the **Add User** window, do the following:
    a. Add the photo of the user.
    b. Enter the first name of the user in the **First Name** field.
    c. Enter the last name of the user in the **Last Name** field.
    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 5-6 Check Permissions



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

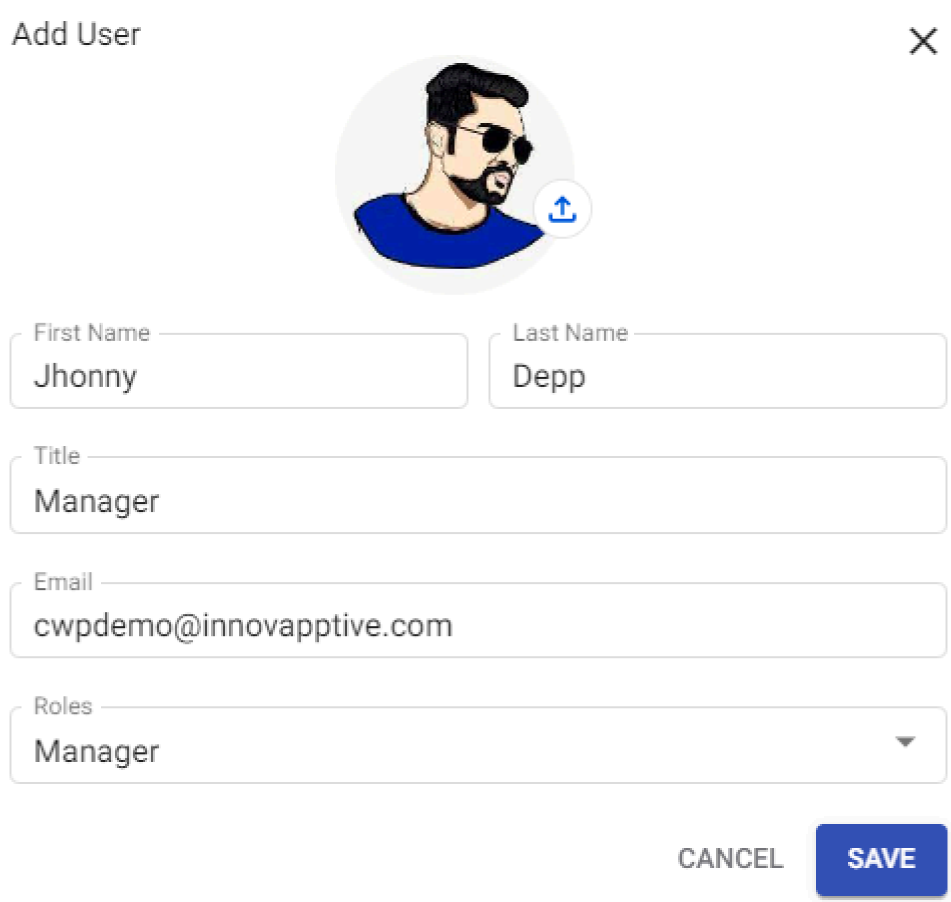
h. Select the dates from the **Valid From** and **Valid Through** calendars.

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 5-7 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**.

5.4. 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.

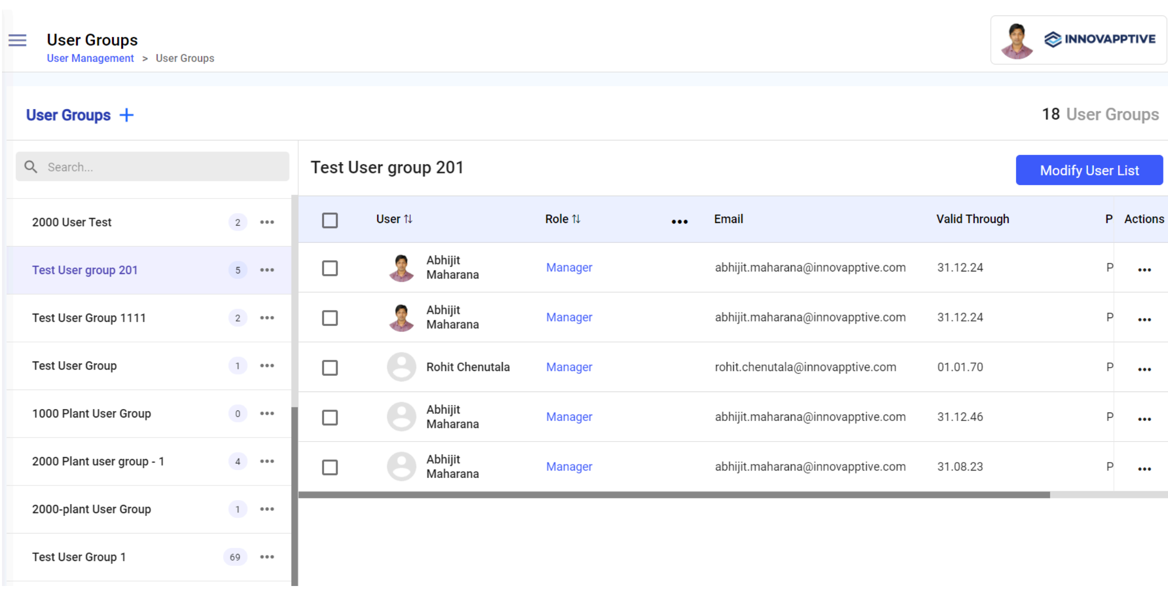
For example, all Technicians in a plant can be part of a *Technician Group* with predefined access to Work Orders and Issue Reporting, while Supervisors in a *Supervisor Group* may have permissions to assign and monitor work orders.

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.

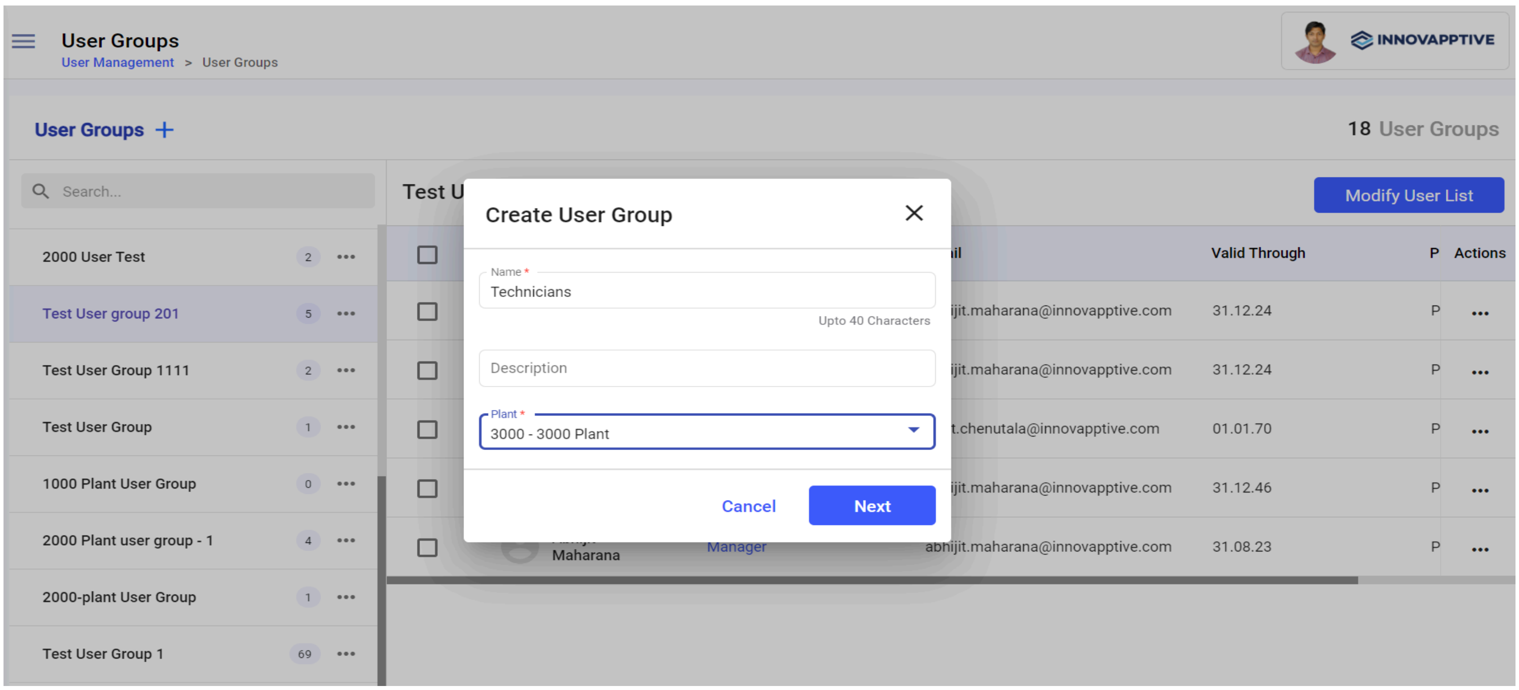
Figure 5-8 User Groups Screen



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 5-9 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.

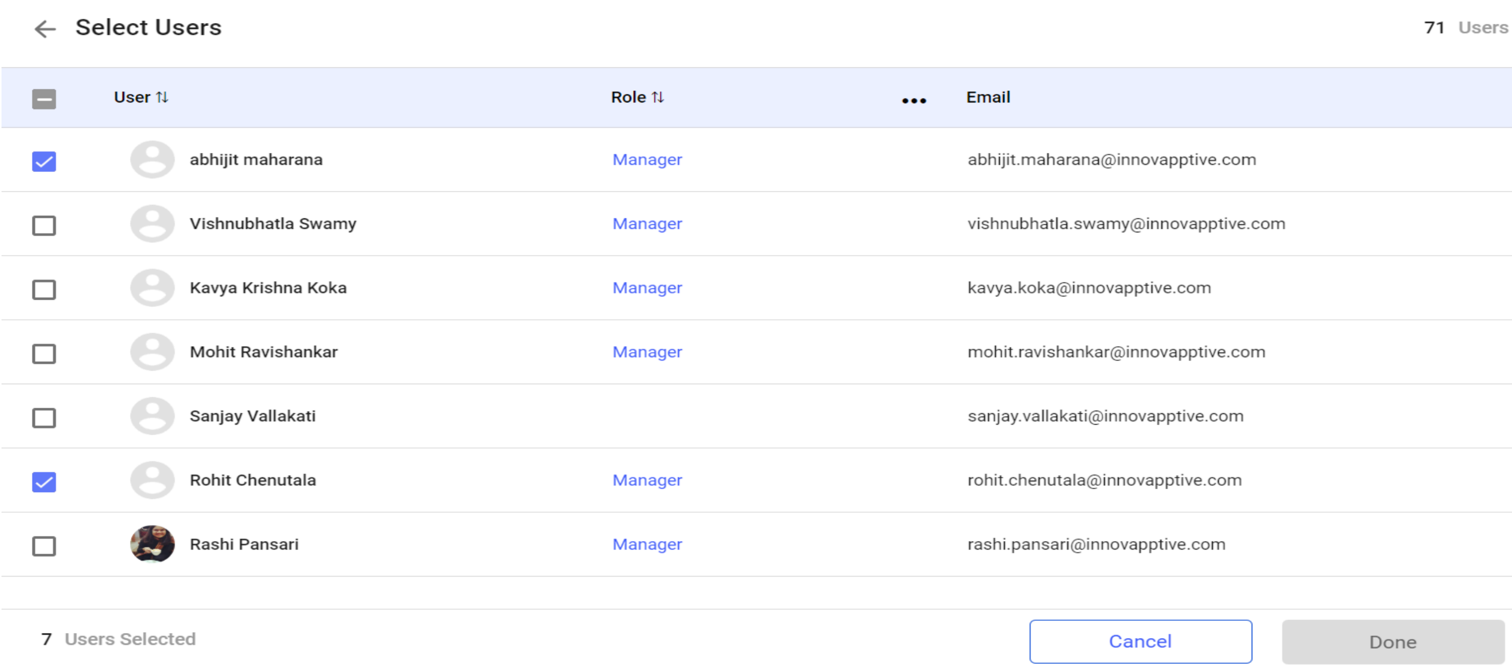
   In this screen, you can,
   - Copy the user group using the More ••• icon > **Copy** option next to the user group on the left-side section.
   - Delete the user group using the More ••• icon > **Delete** option next to the user group on the left-side section.
   - Edit the user group using the More ••• 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 5-10 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.

6. Invoke mRounds Tasks using APIs

Innovapptive exposes certain APIs that can be consued by applications and create tasks like creating operator rounds, dynamically generate round plans, and so on.

To ensure security and control over API usage, API Key authentication is enforced. To access mRounds APIs, include a valid API key in requests. These keys ensure trusted connections are established with authorized users. This helps protect sensitive data and resources while promoting secure and controlled interactions between external applications and Innovapptive's services.

6.1. Generating API Keys

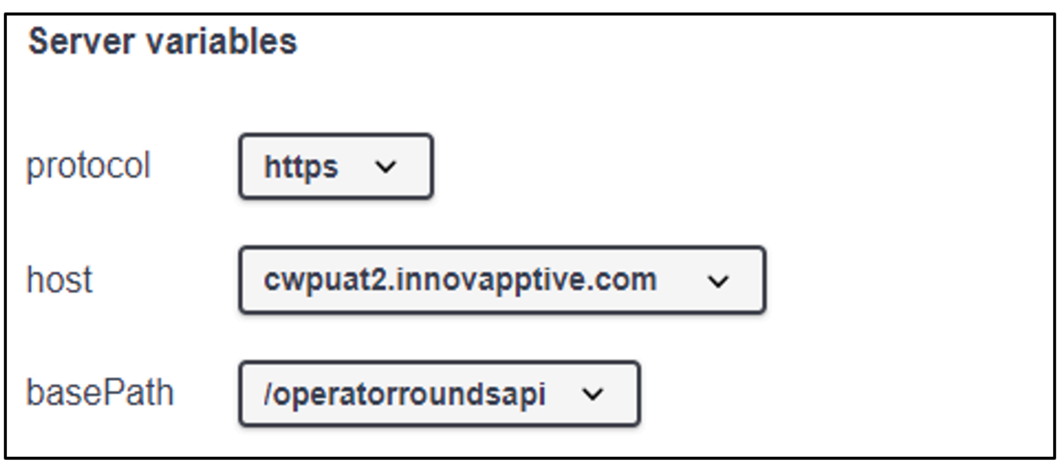
This section describes the process for generating API keys

The API Key is generated during the tenant onboarding process or whenever a customer requests access to the API programmatically. The CBO admin generates the key for the specific tenant or customer upon receiving a request.

> **Note:**
> API Key access is restricted to the set of API's identified as being programmatically accessed by a tenant. It cannot be used by any Innovapptive client application (web or mobile). If any application consumes the same API, they should follow the traditional token-based authentication mechanism.

6.1.1. Pre-requisites

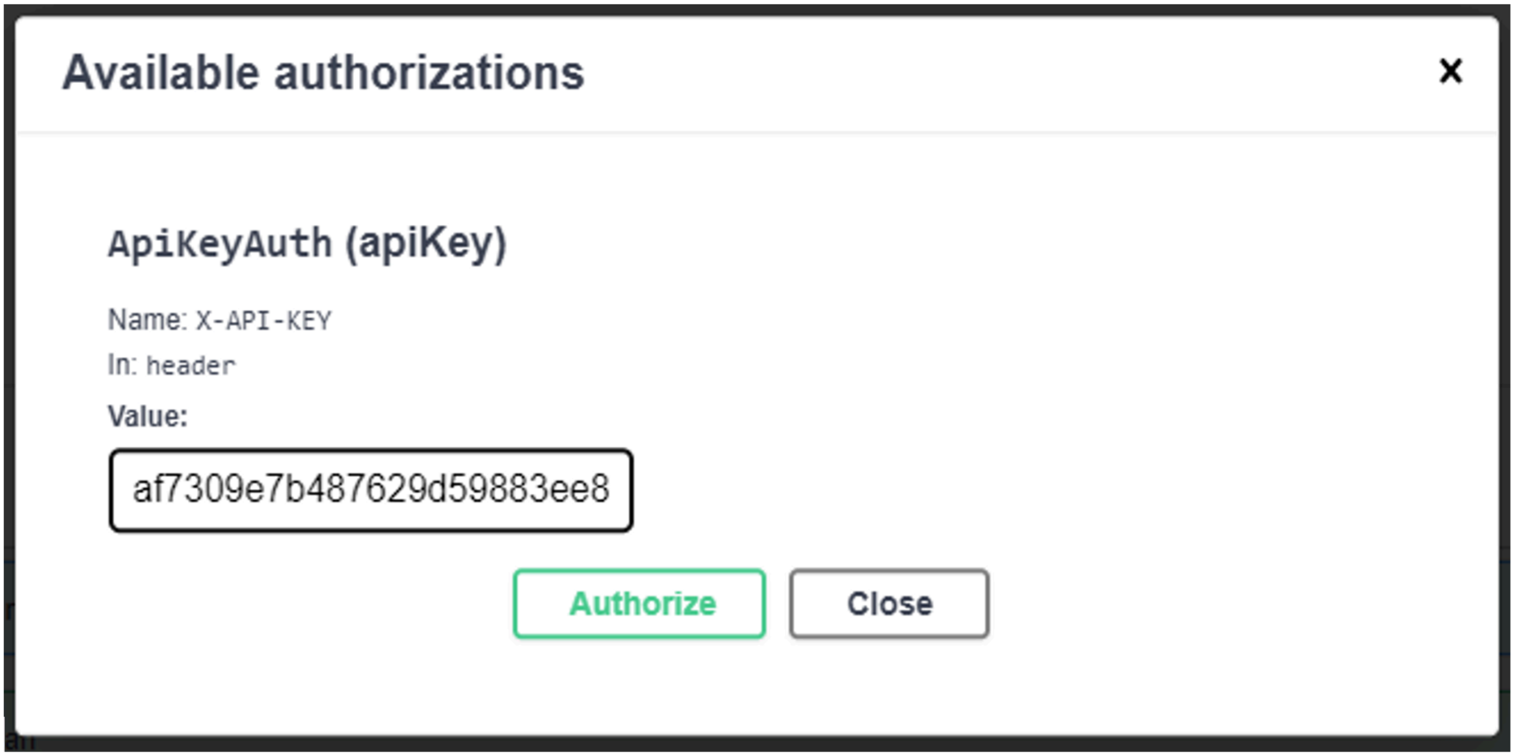
Use the following Request URL:https://cwpuat2.innovapptive.com/operatorroundsapi/external/api-docs/.



Host: Select the host based on the environment:

- **DEV** - cbodev.innovapptive.com
- **QA** - cboqa.innovapptive.com
- **PRD** - cbo.innovapptive.com

Authorize through API Key



6.1.2. Generate API Keys

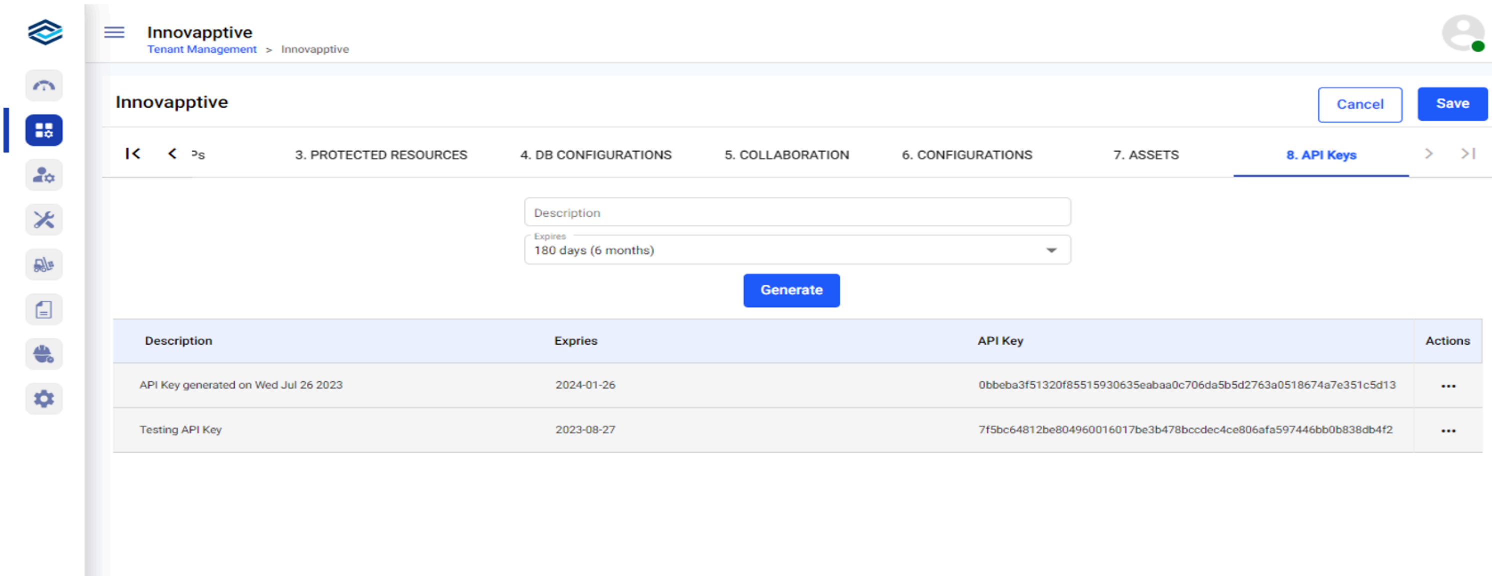
Learn how to generate API keys

To generate the API key:

1. Open the CBO application.
2. Click the **Tenant Management** module.
3. Click the More icon > **Edit** button for the selected tenant.
4. Click the **API Keys** tab.
5. Enter the following details:
    a. **Description**: Enter the relevant description.
    b. **Expires**: Select the API Key expiration duration, such as 30 days, 90 days, 180 days, or 365 days, from the drop-down.

6. Click **Generate**.

   The API Key is generated and ready to be shared with the customer.



> **Note:**
> To delete the API Key, click the More icon > **Delete** for the selected key.

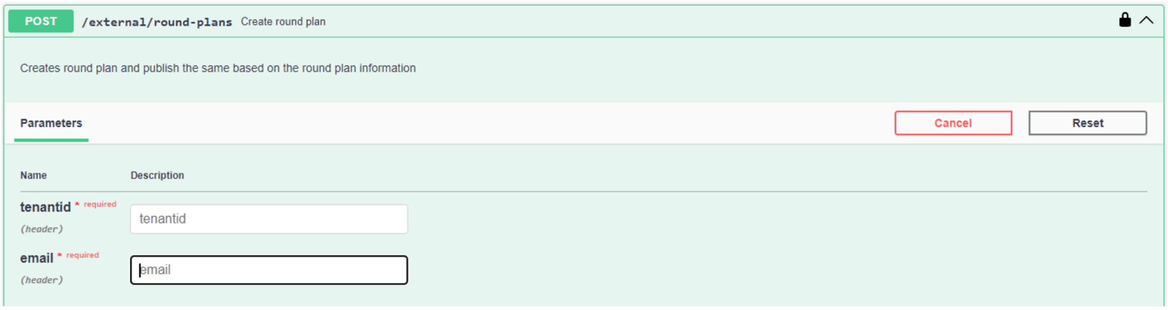
6.2. Creating Rounds using APIs

Learn how to create rounds using APIs

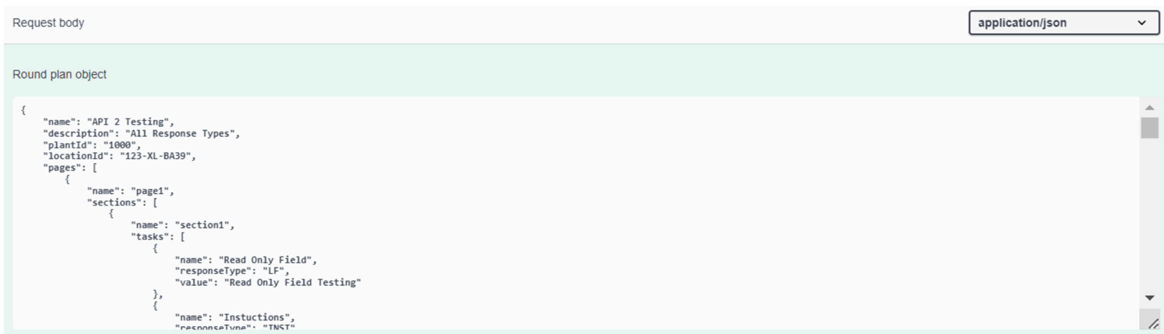
To create round through an API:

1. Expand the Post method with `round-plans`.
2. Click **Try it out**.
3. Provide the following request parameters:

Field Name	Description
tenantid*	Enter the Tenant ID created by Tenant Management.
email*	Enter any email address that is already onboarded in the tenant.



4. In the **Request Body** section, enter the request parameter values (JSON).



> **Note:**
> Please refer to the Request body JSON for Round Plan Creation Payload Formation *(on page 103)* section for more information.

6.2.1. Request body JSON for Round Plan Creation Payload Formation

Header Information Payload

- The Header Details contain the name of the Round Plan, and the Plant ID.
- Enter the LocationID & AssetID for respective locations and assets.
- Provide the name of the Page & Sections inside the page and create tasks.

```
{
 "name": "Daily Round Plan",
 "plantId": "1000",
 "locationId": "123-XL-BA39",
 "pages": [
     {
```

```
         "name": "page1",
         "sections": [
             {
                 "name": "section1",
                 "tasks ": [
              }
      }
  }
```

Response Type Configuration Payload

Read Only

- The "name" field must contain the name of the task.
- The response type must be given as “LF”.
- The “value” field must contain the default value the user wants to see in the application.

```
    {
         "name": "Read Only Field",
         "responseType": "LF",
         "value": "Default Value"
     }
```

Instruction Response Type

- The "name" field must contain the name of the task.
- The response type must be given as “INST”.
- The “value” field must contain the default value of the instructions the user wants to see in the application.

```
   {
     "name": "Instructions",
     "responseType": "INST",
     "value": {}}
    }
```

Short Text Answer

- The "name" field must contain the name of the task.
- The response type must be given as “TF”.
- If a Short Text Answer is required, then the “required” field should be either True or False.
- For True the name should be “Short Text Answer Required”.

```
{
                    "name": "Short Text Answer",
                    "responseType": "TF",
                    "value": "",
                    "required": false
                },
                {
                    "name": "Short Text Answer Required",
                    "responseType": "TF",
                    "value": "",
                    "required": true
                },

 }
```

Long Text Answer

- The "name" field must contain the name of the task.
- The response type must be given as “LTV”.
- If a Long Text Answer is required, then the “required” field should be either True or False.
- For True the name should be “Long Text Answer Required”.

```
{
         "name": "Long Text Answer",
         "responseType": "LTV",
         "value": "",
         "required": false
         },
         {
         "name": "Long Text Answer Required",
```

```
                "responseType": "LTV",
                "value": "",
                "required": true
        },
```

Number Response Type

- The "name" field must contain the name of the task.
- The Number Response Type has the following Configuration Options:
    1. Number without UOM & range
    2. Number without range
    3. Number Testing with None
- The response type field for all the configurations is the same and must be "NF".
- To enable tracking of History, the enableHistory field inside value must be true.
- To add Unit Of Measurement, the UnitOfMeasurement field must be followed by the UOM ID inside the value.
- To set up range, define the min and max values along with messages that must be displayed for values that are beyond the range. These Messages are categorized as Warning, Alert, Note & None.
    - You can enter the respective value inside the value field, for example `"rangeMetadata": {"min": 0, "max": 10, "minMsg": "Test message", "maxMsg": "", "minAction": "Warning", "maxAction": "None"`

```
    "name": "Number without UOM & range",
                    "responseType": "NF",
                    "required": true,
                    "value": { "enableHistory": false}
                },
                {
                    "name": "Number without range",
                    "responseType": "NF",
                    "required": true,
     "value": { "enableHistory": false, "unitOfMeasurementId": "f0deec55-2401-41ab-b88d-37f8ced36e09"}
                },
                {
                    "name": "Number Testing with None",
                    "responseType": "NF",
                    "required": true,
```

```
            "value": { "enableHistory": false, "unitOfMeasurementId": "f0deec55-2401-41ab-b88d-37f8ced36e09",
"rangeMetadata": {"min": 0, "max": 10, "minMsg": "", "maxMsg": "", "minAction": "None", "maxAction": "None"}}
                        },
                        {
                            "name": "Number Testing with None",
                            "responseType": "NF",
                            "required": true,
            "value": { "enableHistory": false, "unitOfMeasurementId": "f0deec55-2401-41ab-b88d-37f8ced36e09",
"rangeMetadata": {"min": 0, "max": 10, "minMsg": "Test message", "maxMsg": "", "minAction": "Warning", "maxAction":
"None"}}
                        },
```

Global Picklist Single Selection

- The "name" field must contain the name of the task.
- The Response type must be given as DD.
- The "value" must contain Response Set ID.
    - This fetches the necessary Picklist from the master data.

```
          {
                  "name": "Picklist Testing",
                  "responseType": "DD",
                  "required": true,
                  "value": {"responseSetId" : "31c52245-c756-4bc8-ad02-0ee3c952fecc" }
           },
```

Global Picklist Multiple Selection

- The "name" field must contain the name of the task.
- The Response type must be given as DDM.
- The "value" must contain Response Set ID.
    - This will fetch the necessary Multiple Select Choice from the master data.

```
{
                    "name": "Multiple Select Choice answers Testing",
                    "responseType": "DDM",
                    "required": true,
                    "value": {"responseSetId" : "31c52245-c756-4bc8-ad02-0ee3c952fecc" }
 },
```

Scanner

- The "name" field must contain the name of the task.
- The Response type must be given as SF.

```
{
                    "name": "Scan Testing",
                    "responseType": "SF",
                    "required": true,
                    "value": ""
 },
```

Date & Time

- The "name" field must contain the name of the task.
- The Response type must be given as DT.
- The user can choose the combination of True and False in "value" to show either date or time or both.

```
{
                    "name": "Date & Time Testing",
                    "responseType": "DT",
                    "required": true,
                    "value": {"date": false, "time": true}
}
```

Hyperlink

- The "name" field must contain the name of the task.
- The Response type must be given as HL.
- Enter the link under the "value" field.

```
{
                    "name": "Hyperlink Testing",
                    "responseType": "HL",
                    "value": {"link": "https://google.com"}
},
```

Check box

- The "name" field must contain the name of the task.
- The Response type must be given as CB.

```
{
                    "name": "Checkbox Testing",
                    "responseType": "CB",
                    "required": false,
                    "value": ""
},
```

Signature

- The "name" field must contain the name of the task.
- The Response type must be given as SGF.

```
{
                    "name": "Signature Testing",
                    "responseType": "SGF",
                    "required": false,
                    "value": ""
}
```

Photo Response

- The "name" field must contain the name of the task.
- The Response type must be given as ATT.

```
{
                    "name": "Photo Testing",
                    "responseType": "ATT",
                    "required": false,
                    "value": ""
},
```

Geo Location Response

- The "name" field must contain the name of the task.
- The Response type must be given as GAL.

```
{
                    "name": "Geo Location Testing",
                    "responseType": "GAL",
                    "required": false,
                    "value": ""
 },
```

Date Range

- The "name" field must contain the name of the task.
- The Response type must be given as DRF.

```
 {
                    "name": "Date range Testing",
                    "responseType": "DFR",
                    "required": false,
                    "value": ""
 }
```

Multiple Choice

- The "name" field must contain the name of the task.
- The Response type must be given as VI.

```
    {
                    "name": "Multiple Choice Answers Testing",
                    "responseType": "VI",
                    "required": false,
                    "value": "yes,no"
    },
```

Slider

- The "name" field must contain the name of the task.
- The Response type must be given as RT.
- The value field must contain the Minimum & the Maximum Value along with the Increment.

```
    {
              "name": "Slider Testing",
              "responseType": "RT",
              "required": false,
              "value": {"min": 10, "max": 100, "enableHistory": true, "value": 20, "increment":
    }
```

Below is an example of a complete round plan with Round Name, Plant, Location, Pages Sections & Tasks.

```
{
  "name": "Daily Round Plan",
  "description": "All Response Types",
  "plantId": "1000",
  "locationId": "123-XL-BA39",
  "pages": [
    {
        "name": "page1",
        "sections": [
            {
                "name": "section1",
                "tasks": [
                    {
                        "name": "Read Only Field",
                        "responseType": "LF",
```

```
    "value": "Read Only Field Testing"
},
{
    "name": "Instructions",
    "responseType": "INST",
    "value": {}
},
{
    "name": "Instructions with tag",
    "responseType": "INST",
    "value": { "tag": "Caution"}
},
{
    "name": "Short Text Answer",
    "responseType": "TF",
    "value": "",
    "required": false
},
{
    "name": "Short Text Answer Required",
    "responseType": "TF",
    "value": "",
    "required": true
},
{
    "name": "Long Text Answer",
    "responseType": "LTV",
    "value": "",
    "required": false
},
{
    "name": "Long Text Answer Required",
    "responseType": "LTV",
    "value": "",
    "required": true
},
{
```

```
                            "name": "Number without UOM & range",
                            "responseType": "NF",
                            "required": true,
                            "value": { "enableHistory": false}
                        },
                        {
                            "name": "Number without range",
                            "responseType": "NF",
                            "required": true,
                            "value": { "enableHistory": false, "unitOfMeasurementId":
"db5aaa7d-d13f-4e83-a3f1-e108c3f16e3f"}
                        },
                        {
                            "name": "Number Testing with None",
                            "responseType": "NF",
                            "required": true,
                            "value": { "enableHistory": false, "unitOfMeasurementId":
"db5aaa7d-d13f-4e83-a3f1-e108c3f16e3f", "rangeMetadata": {"min": 0, "max": 10, "minMsg": "", "maxMsg": "",
"minAction": "None", "maxAction": "None"}}
                        },
                        {
                            "name": "Number Testing with None",
                            "responseType": "NF",
                            "required": true,
                            "value": { "enableHistory": false, "unitOfMeasurementId":
"db5aaa7d-d13f-4e83-a3f1-e108c3f16e3f", "rangeMetadata": {"min": 0, "max": 10, "minMsg": "Test message", "maxMsg": "",
"minAction": "Warning", "maxAction": "None"}}
                        },
                        {
                            "name": "Picklist Testing",
                            "responseType": "DD",
                            "required": true,
                            "value": {"responseSetId" : "f87a12bc-aab2-4199-9bc4-4c09cec549e9" }
                        },
                        {
                            "name": "Multiple Select Choice answers Testing",
                            "responseType": "DDM",
```

```
                "required": true,
                "value": {"responseSetId" : "f87a12bc-aab2-4199-9bc4-4c09cec549e9" }
            },
            {
                "name": "Scan Testing",
                "responseType": "SF",
                "required": true,
                "value": ""
            },
            {
                "name": "Date & Time Testing",
                "responseType": "DT",
                "required": true,
                "value": {"date": false, "time": true}
            }
        ]
    },
    {
        "name": "section2",
        "tasks": [
            {
                "name": "Date & Time Testing",
                "responseType": "DT",
                "required": true,
                "value": {"date": false, "time": false}
            },
            {
                "name": "Hyperlink Testing",
                "responseType": "HL",
                "value": {"link": "https://google.com"}
            },
            {
                "name": "Checkbox Testing",
                "responseType": "CB",
                "required": false,
                "value": ""
            },
```

```
                {
                    "name": "Signature Testing",
                    "responseType": "SGF",
                    "required": false,
                    "value": ""
                },
                {
                    "name": "Photo Testing",
                    "responseType": "ATT",
                    "required": false,
                    "value": ""
                },
                {
                    "name": "Geo Location Testing",
                    "responseType": "GAL",
                    "required": false,
                    "value": ""
                },
                {
                    "name": "Date range Testing",
                    "responseType": "DFR",
                    "required": false,
                    "value": ""
                }
            ]
        }
    ]
},
{
    "name": "page2",
    "sections": [
        {
            "name": "section1",
            "tasks": [
                {
                    "name": "Multiple Choice Answers Testing",
                    "responseType": "VI",
```

```
                        "required": false,
                        "value": "yes,no"
                    },
                    {
                        "name": "Slider Testing",
                        "responseType": "RT",
                        "required": false,
                        "value": {"min": 10, "max": 100, "enableHistory": true , "value": 20, "increment": 10}
                    }
                ]
            },
            {
                "name": "section2",
                "tasks": [
                    {
                        "name": "Multiple Choice Answers Testing",
                        "responseType": "VI",
                        "required": false,
                        "value": "yes,no"
                    },
                    {
                        "name": "Multiple Choice Answers Testing",
                        "responseType": "VI",
                        "required": false,
                        "value": "yes,no,test"
                    }
                ]
            }
        ]
    }
  ]
}
```

6.3. Dynamically Generate and Partially Execute a Round

A round plan is a blueprint that outlines the structure and steps of a round. You must first create a round plan and then generate a round from the round plan.

Create and publish a round plan with tasks.

To create a round plan:

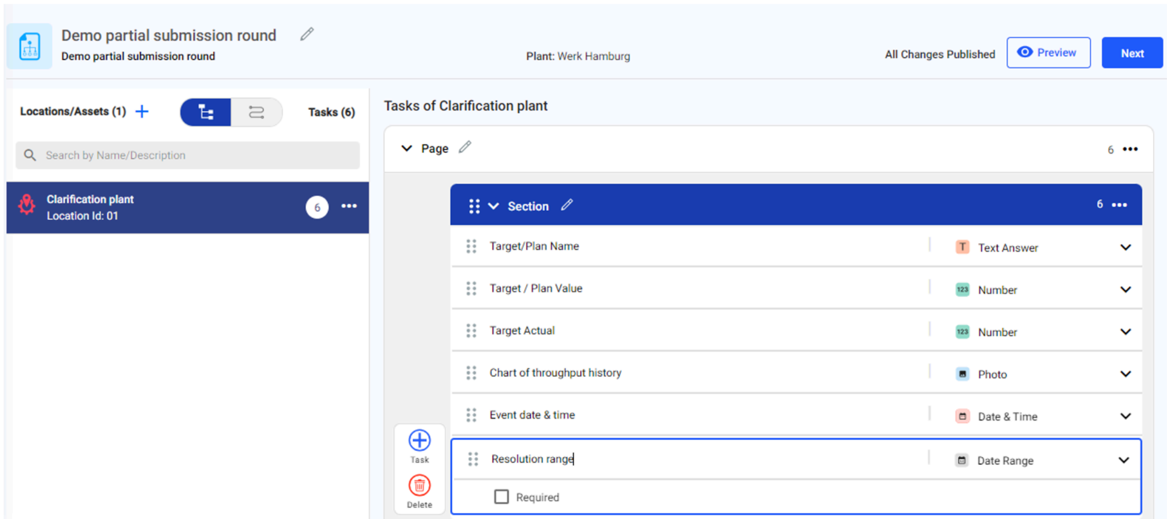
1. Open the **Operator Rounds** module.
2. Click **Create New**.
3. In the **Plan Details** screen, enter **Plan Name**, **Plan Description**, **Plant**, and **Tags**.
4. Click **Save & Next**.
5. Select **Location** and **Assets**.
6. Add required tasks for the round.

> **Note:**
> This Dynamic Rounds Generation using APIs process supports only five Response Types. They are Text Answer, Number, Date Range, Date & Time, and Photo.

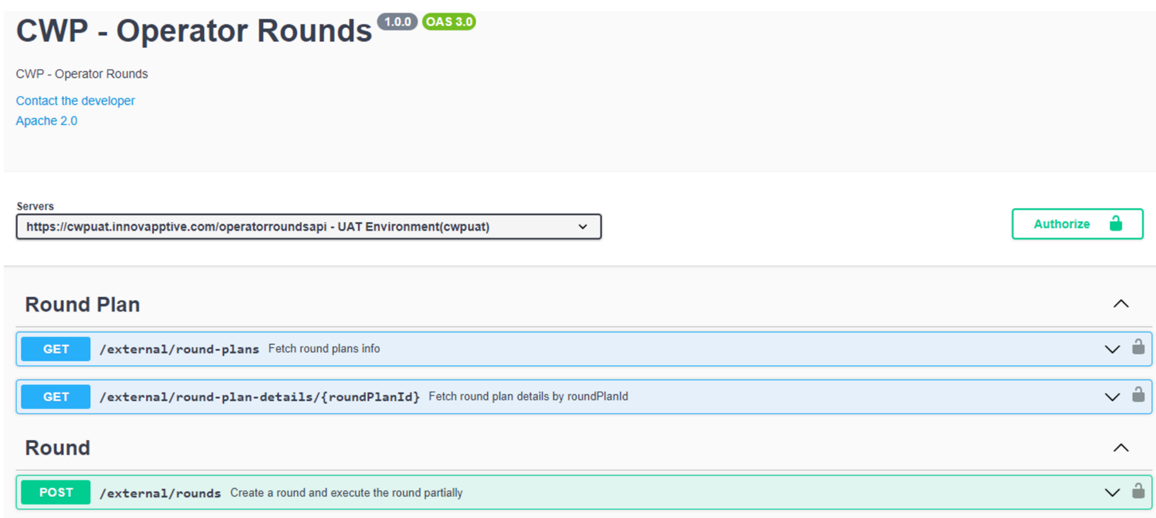
7. Click **Next** and **Publish**.

   The interested customer requires an API Key along with the Tenant ID to be able to dynamically generate and partially execute a round. When the Innovapptive security module receives an API request from the customer, the key is evaluated, a secure connection is established between the applications, and the customer gains access to the API and can expect the desired API response.

In a worst-case scenario, if the API receives a bad request or the API_Key fails to validate, it returns a response with the HTTP bad request status code.



To programmatically generate and partially execute a round, see, How to get Round Plans List *(on page 118)*, How to get Round Plan Details *(on page 120)*, and Dynamically Generate and Partially Execute a Round *(on page 116)*.

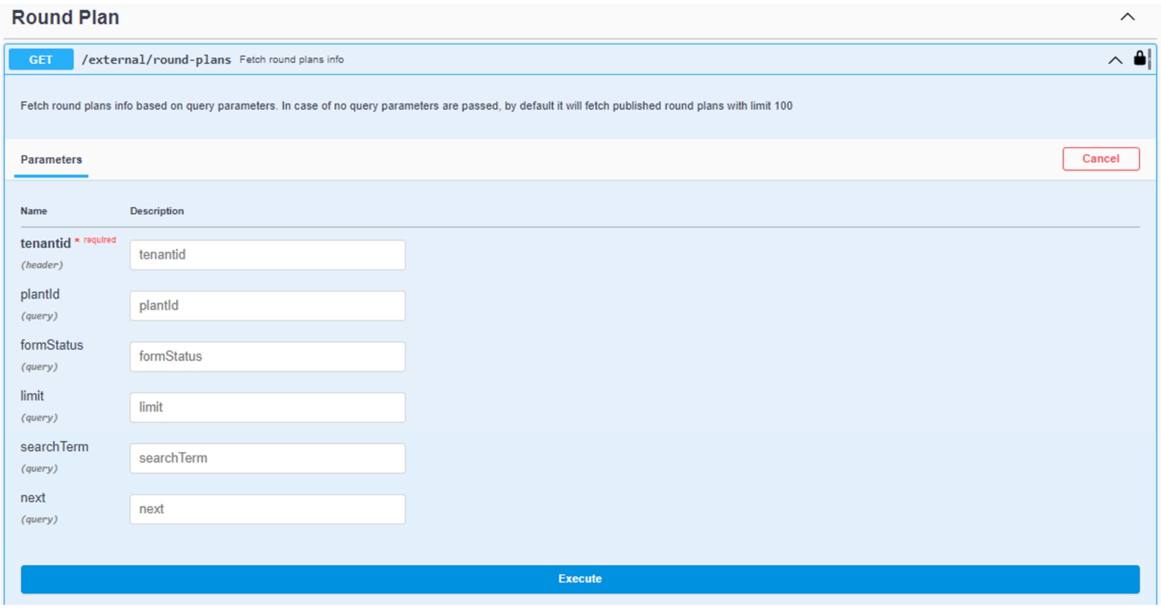


6.3.1. How to get Round Plans List

The Get Round Plans List API service allows you to fetch the round plans list based on query parameters. If no query parameters are passed, by default, it fetches the published round plans list with a limit of 100.

To get the round plans list:

1. Expand the Get method with `round-plans`.
2. Click **Try it out**.



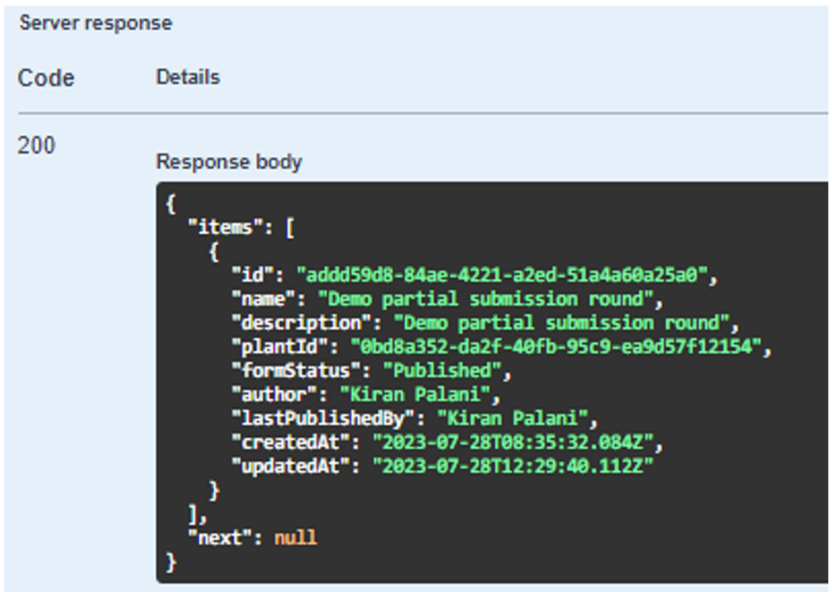
3. Provide the following request parameters:

Field Name	Description
tenantid*	Enter the Tenant ID created by Tenant Management.
plantid	Enter Plant ID to filter the response based on plant id.
formStatus	Enter status to filter the response based on form status, such as Draft or Published.
limit	Enter the limit to display a specific number of records. If no value is entered, 100 records are displayed by default.
searchTerm	Enter a search term to filter the response by a particular term. For example, Demo partial submission round.

Field Name	Description
next	Enter the next value to display the next set of records. For example, if there are 100 records, the limit is set to 25, and if you want to get the next set of 25 records, you can provide the next value as 25.

4. Click **Execute**.

   The following response is displayed.

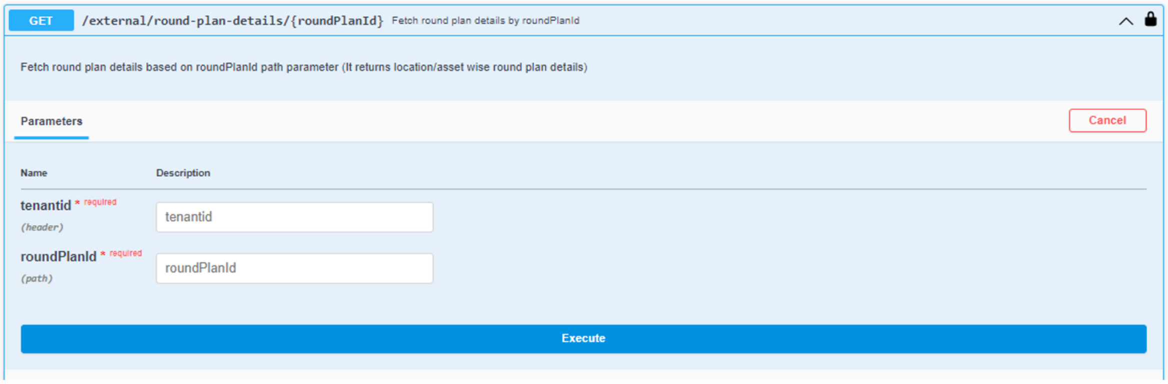


6.3.2. How to get Round Plan Details

The Get Round Plan Details API service allows you to fetch specific round plan details with tasks based on the `roundPlanId` path parameter. It returns location or asset wise round plan details.

To get the specific round plan details:

1. Click **Authorize**.
2. In the **Available Authorizations** pop-up, enter the API Key value and click **Authorize**.
3. Click **Close**.
4. Expand the Get method with `roundPlanId`.
5. Click **Try it out**.



6. Provide the following request parameters:

Field Name	Description
tenantid*	Enter the Tenant ID created by Tenant Management.
roundPlanId	Enter the Plan ID to display the specific round plan details. You can copy the ID value from the above response.

7. Click **Execute**.

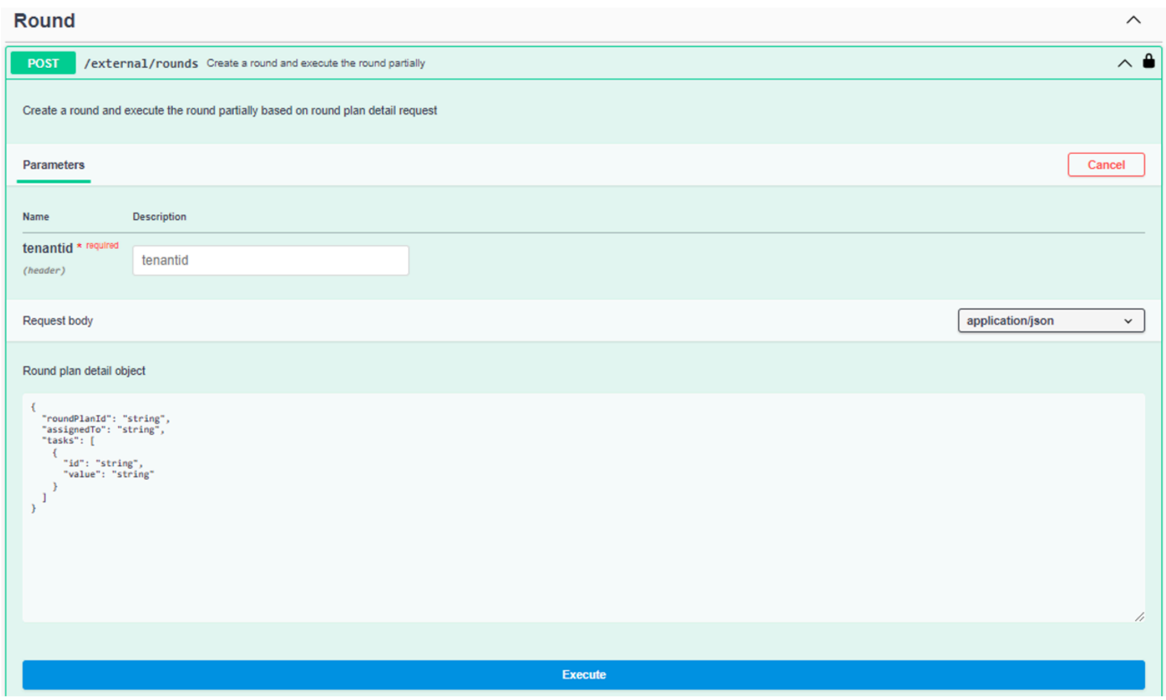
   The following response is displayed.

6.3.3. How to create a Round and Partially execute It

The Post Round Plan API service allows you to create a round and execute it partially based on the round plan details request.

To create and execute a round partially:

1. Click **Authorize**.
2. In the **Available Authorizations** pop-up, enter the API Key value and click **Authorize**.
3. Click **Close**.
4. Expand the Post method with `rounds`.
5. Click **Try it out**.



6. Provide the following request parameters:

Field Name	Description
tenantid*	Enter the Tenant ID created by Tenant Management.

7. In the **Request Body** section, edit the code by adding pre-filled values as required.

> **Note:**
> This Dynamic Rounds Generation using APIs process supports only five Response Types. They are Text Answer, Number, Date Range, Date & Time, and Photo. The format of the pre-filled response must be base 64 for images, ISO string for Date & Time, and Date Range response types.

For example,


```
{
  "roundPlanId": "addd59d8-84ae-4221-a2ed-51a4a60a25a0",
  "assignedTo": "abc@iinovapptive.com",
  "tasks": [
    {
      "id": "Q1",
      "value": "Tom Curran"
    },
    {
      "id": "Q2",
      "value": "209.09"
    },
    {
      "id": "Q3",
      "value": "2023-07-31T08:11:31.526Z"
    },
    {
      "id": "Q4",
      "value": "2023-07-31T08:11:31.526Z"
    },
    {
      "id": "Q5",
      "value": "2023-07-31T08:44:24.526Z;2023-07-30T08:44:24.526Z"
    },
    {
      "id": "Q6",
"value":
 "UklGRv6kBABXRUJQVlA4IPKkBACwgBWdASrKCNwFPkkkjkUioiEqpdK6qVAJCWNuKQh/+988q1p8CnkK8Dx6prJ6z+sg2ln8POO4y0n27gZJ7
7J/QsZ3/T1z/ZP9rzKua/2D/n/5Pyr/qP/H42vn/+5/7
```

```
vuFfy/+q/77/E/lB87P+L3pm3f7T/Af/a/8n/6f9T6W/J1/4/qhf4X1Hf9P0Jv1X/gfuD8Bn6zenj/b/c300/tn/I/bX3K/1P/N/+//U9rjwP
0p/fYKlxfZ/+X/Y/vB/p/eu5D71/mH4P/Rf9n/K/u19s/9r/8eKPt3/V/br1bOov/N/nv9d+53ym/7H/x/3n+++M/8s/2f/
w/1/7//737Gf1u/7X+K/1Xwn/9H7kfC794PVz+4v7f/8f4TP/P+7///+T39O/7X7m/9/5Pv6b/xf///1v/V8e/rW/+31af+/6K//q/eb/7/Mh
+5H7pf934Pf8//+v9r/wdcA+Sf9/zV/Nv7n9tfI38293j3o/z376/Ndnz7nP/X9s/Zj+h/q/
/D/nPZf9+X++9CfzT++9C/8u/rv/M/w3swTifEnL32X+av00P3/259zf1z/m+xP/UOSp/pf
+f2JP9J/vvVf/3//36efsD9ufdK/xROkMFe5lo2gs7bNwM97pbcWmJN/TtUi0b0hSm2m4Beb9ZNSnLhqqIlsvgxpXX/kr6Eofiqgnej0N8qWh2w
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```

```
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```

```
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```

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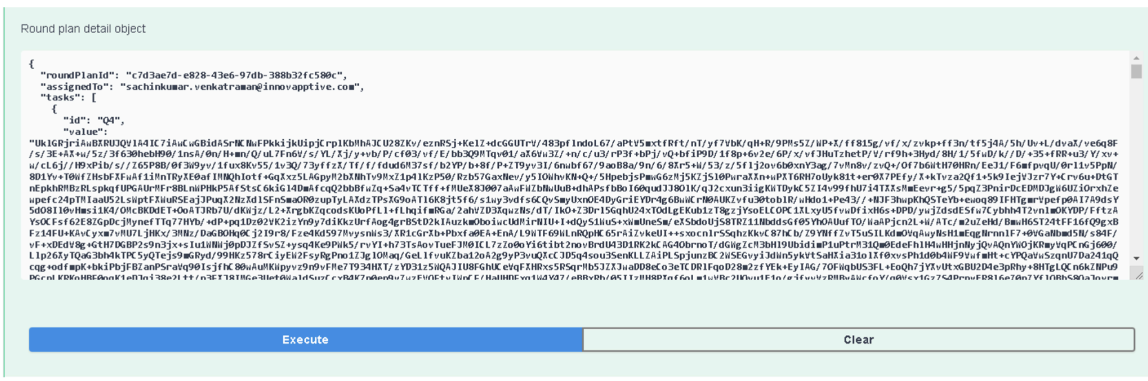
    },


 ]

}
```

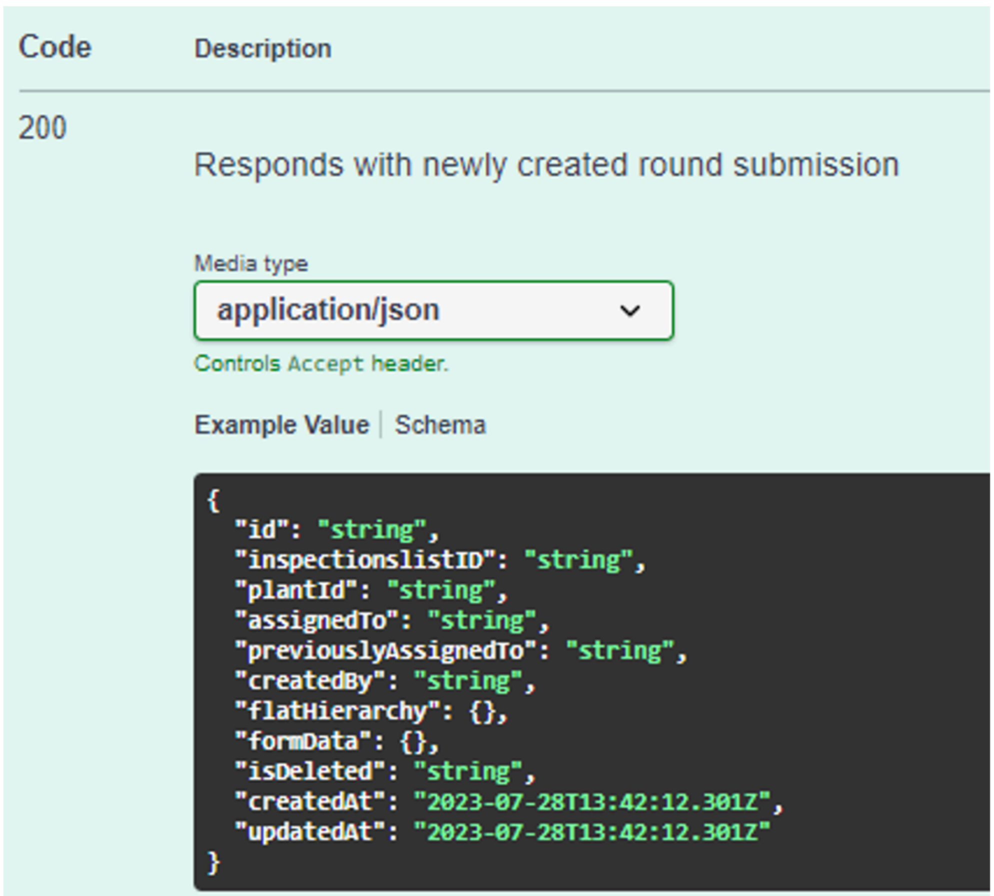

Add the base 64 string (id: Q6) for the image response type.



Note:
If you provide the email ID of the person who needs to work on the round in the Assign to field, then the round is assigned to the user and automatically appears in the My Rounds screen of the user with the In-progress state in the user's mobile application.

8. Click **Execute**.

   The following response is displayed.



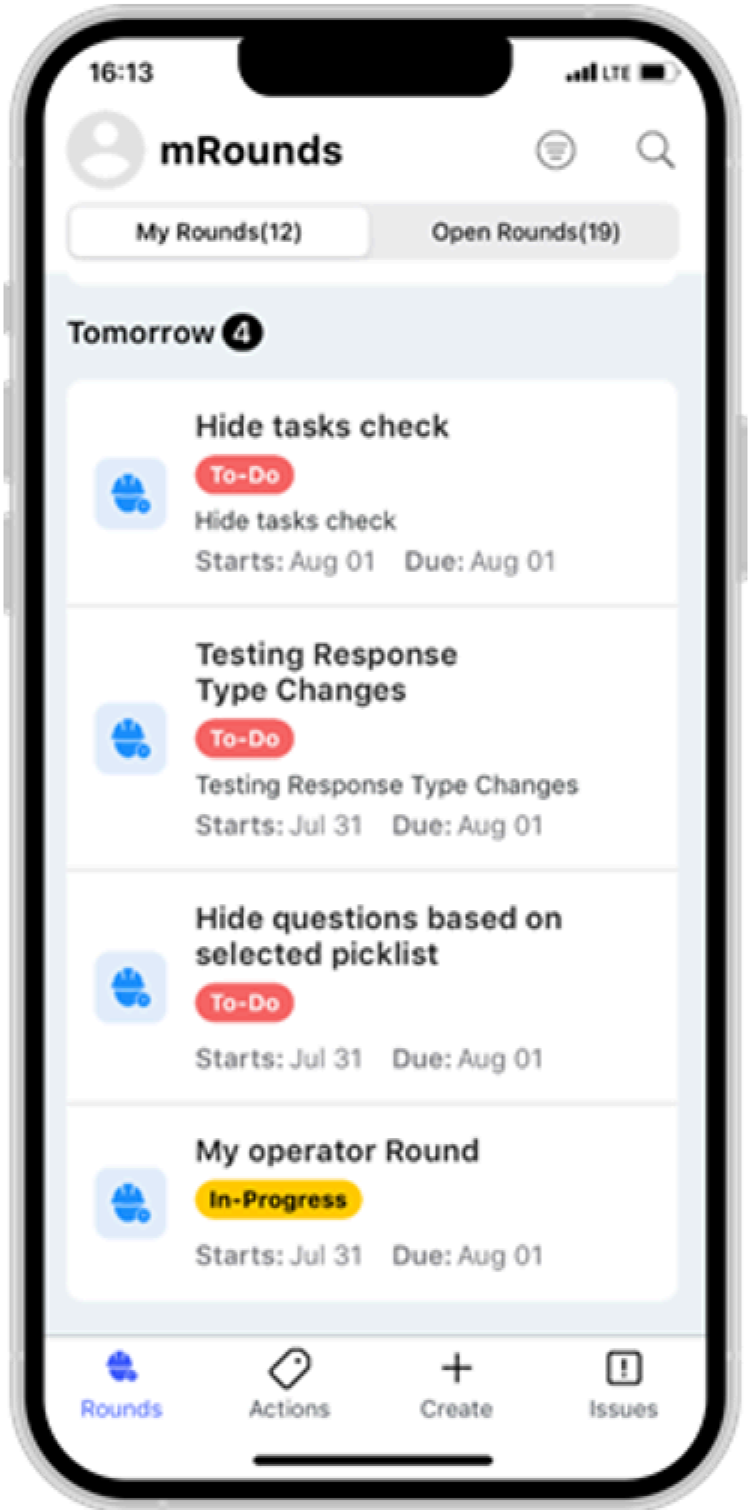
6.3.4. How to view the Updated Details in the mRounds Mobile App

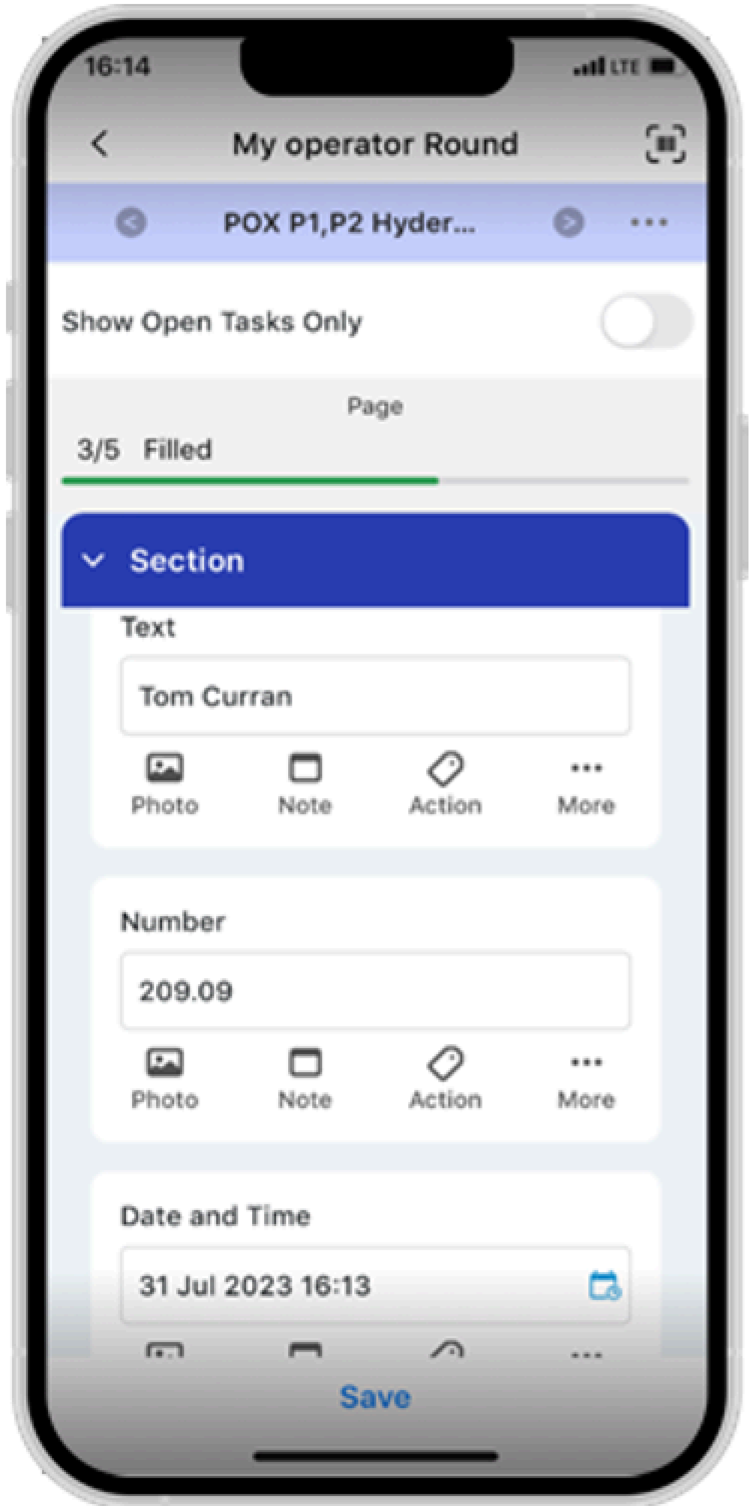
You can view all the pre-filled responses on the mobile application.

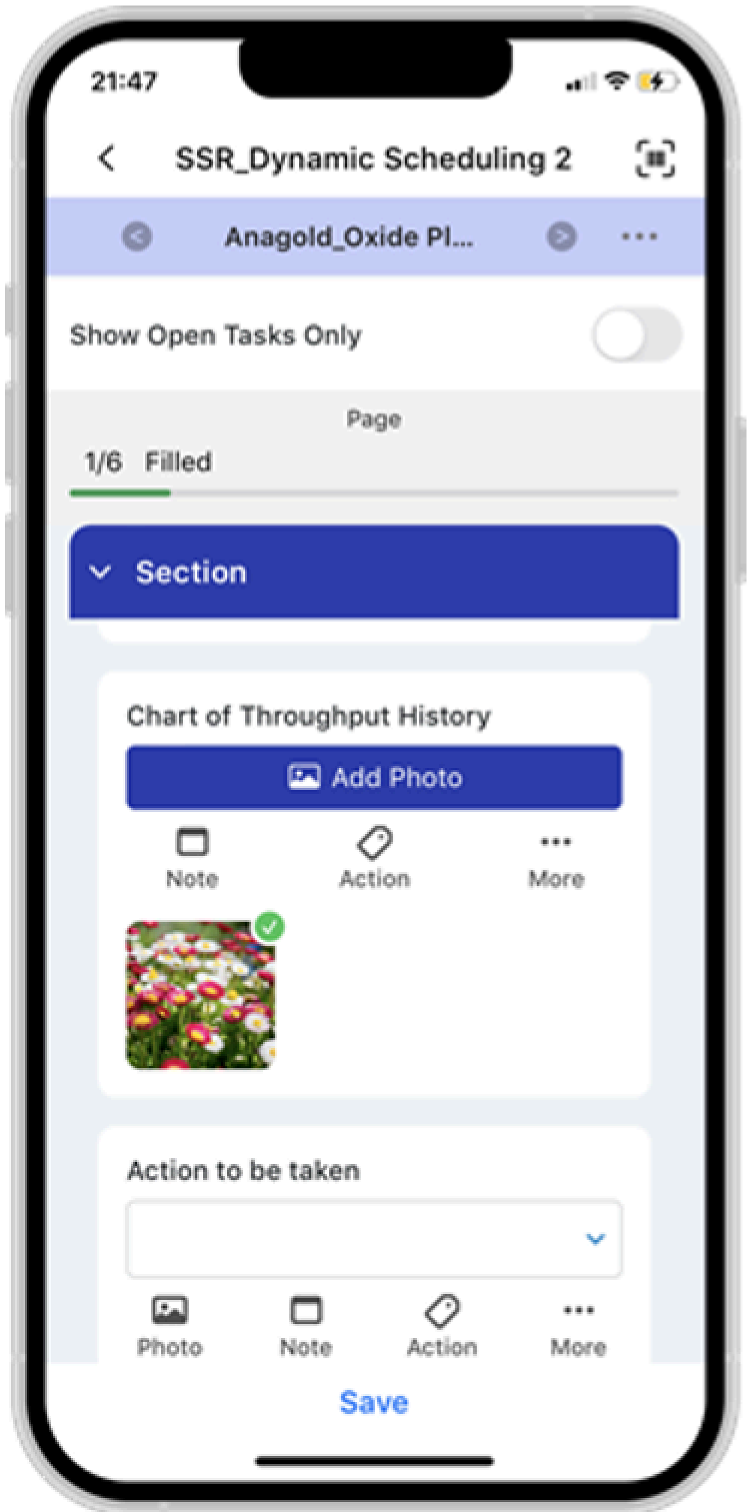
To view partially executed round details:

1. Open the mRounds mobile application.
2. Tap the **Open Rounds** tab.

> **Note:**
> If you provide the email ID of the person who needs to work on the round in the Assign to field, then the round is assigned to the user and automatically appears in the **My Rounds** screen of the user with the **In-progress** state in the user's mobile application.


16:13
mRounds
My Rounds(12)
Open Rounds(19)
Tomorrow 4
Hide tasks check
To-Do
Hide tasks check
Starts: Aug 01 Due: Aug 01
Testing Response Type Changes
To-Do
Testing Response Type Changes
Starts: Jul 31 Due: Aug 01
Hide questions based on selected picklist
To-Do
Starts: Jul 31 Due: Aug 01
My operator Round
In-Progress
Starts: Jul 31 Due: Aug 01
Rounds
Actions
Create
Issues


16:14
My operator Round
POX P1,P2 Hyder...
Show Open Tasks Only
Page
3/5 Filled
Section
Text
Tom Curran
Photo
Note
Action
More
Number
209.09
Photo
Note
Action
More
Date and Time
31 Jul 2023 16:13
Save



3. Select the round, which is in Partially Open status, and tap **Add to My Rounds**.
4. Tap the **My Rounds** tab and select the assigned round to open it.

You can see that some fields or tasks are pre-filled with data. The image, which was given as base64 string is displayed as shown below.

6.4. Understanding Error Codes

Following are the possible error codes:

Error Code/Status	Message	Scenario
200	NA	When the successful response received
401	Request header (x-api-key) is missing	When the authorized API Key is not provided
401	Invalid API Key	When the provided key is invalid or incorrect
401	API Key Expired	When the key is expired
401	TenantId Test not found in db or cache	When the tenatid value is not provided
404	Round plant id did not exist	When an incorrect roundPlantID is provided
500	Internal server error	When the server is not responded