mRounds User Guide for Operators

Connected Worker Solutions

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

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Preface

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

Intended Audience

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

Document Conventions

Table 0-1 Conventions followed in the document

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

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Contents

1. Introduction to mRounds

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

This chapter has the following topics:

1.1. Overview of mRounds

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

The mRounds application includes both mobile and web applications.

mRounds Mobile App

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

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

mRounds Web Application

The mRounds Web Application is your command center for managing maintenance operations efficiently, enables round planners or supervisors to create plans for monitoring and maintaining equipment or locations and assign these tasks to operators. These plans help reduce equipment downtime and minimize repair expenses.

Master Data & User Management Modules

The Master Configuration Module empowers administrators to add Plants, Shifts, Assets, Functional Locations, Units of Measurement, and Global Response Set Data.

Administrators can also include and oversee users, such as supervisors and operators.

1.2. mRounds Benefits for Operators & Supervisors

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

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

- **Track and Document Shift Activities**: Operators can log their shift activities, providing a clear record of what tasks were completed during their shift, which aids in accountability and continuity.
- **User-Friendly Interface**: The mobile app has an intuitive interface that guides operators through rounds efficiently, minimizing the time spent on task navigation and data input.
- **Ad Hoc Rounds Generation Support**: Operators can initiate ad hoc rounds when unexpected inspections or equipment checks are needed, allowing flexibility in maintenance operations.
- **Digital Signatures for Compliance**: Operators can capture digital signatures when completing tasks, ensuring compliance with safety and operational procedures.

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

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

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

1.3. New Features and Enhancements in mRounds

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

Table 1-1 New Features and Enhancements in Release 2506

Import Tasks Instead of Re-Typing When creating a new Round Plan, you can now reuse tasks, sections, or even entire pages from older plans. This saves time, avoids duplication, and ensures inspection content stays consistent across teams. It also reduces errors since you're pulling from already validated material instead of starting fresh every time.
Change Due Dates from the Mobile App Field staff can now adjust the due dates of Adhoc Rounds directly from the mobile app. This makes it easier to respond to changing equipment issues, site conditions, or shifting priorities in real time. Without this option, every small change meant chasing admin support and wasting valuable maintenance time.
Selective Barcode Scanning You can now make barcode scanning mandatory only for specific Round Plans. This gives flexibility—critical assets can still require scanning for compliance and traceability, while routine or low-risk rounds can be completed faster without it. The result is a balance between speed and accuracy in day-to-day operations.
Bulk Upload / Export via Excel You can now upload or export multiple Round Plans and templates at once using a structured Excel file. This makes it much easier to set up standard plans across sites, share templates for review, or make bulk edits without handling them one by one. It saves effort and ensures consistency when managing large volumes of plans.
Post Only the Differences

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

For readings that keep adding up over time (like flow meters for water, gas, or electricity), the system can now send only the difference since the last entry to SAP. This avoids double counting, keeps SAP records clean, and reduces the need for manual corrections.
See Progress on Task Cards Each assigned round or task now shows a progress bar and percentage to track how much is completed. Technicians and supervisors can quickly see what's done, what's pending, and plan their time better. This also encourages timely completion since progress is visible at a glance.
Live Exception Widget You can now spot problems early and act faster with a new widget that highlights abnormal readings of assets in real time. Whether it's unusual pressure, temperature, or other critical values, issues are flagged instantly instead of being buried inside long reports.
Automate Email Scheduling Stay updated effortlessly with scheduled email delivery of both Custom and Out-of-the-Box (OOTB) dashboards. Insights now arrive automatically in your inbox, reducing manual effort and ensuring timely reporting.
Export Round Data to SQL Without Tags, With History You can now send round data to SQL Server even if no tags are set up. Historical records can also be included, so you get both current and past data for analysis. This makes it easier to build reports, track long-term trends, and connect with BI tools.
View Historical Readings on Charts and Spot Trends Charts now show how readings have changed over time, making it easier to see patterns in equipment performance. For example, you can track if a pressure reading is slowly rising, or if a temperature value is dropping more often than expected. These insights help you take action early, plan preventive maintenance, and avoid sudden failures.

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

Smarter Decimal Handling Entering numbers is now easier and less error-prone. You can use either a dot (.) or a comma (,) as the decimal separator, depending on your regional style, and the system will automatically handle it correctly. This helps global teams avoid mistakes and ensures all data is stored in a consistent format.
Track Task Execution with Map Visualization and Geo-Compliance Scoring The system now offers advanced location intelligence by automatically capturing task locations, visualizing them on an interactive map, and calculating geo-compliance scores based on predefined geofences. This ensures tasks are executed in the correct locations, helping verify field activity and reduce discrepancies.
Convert Existing Rounds into Digital Round Plans You can now convert existing Rounds from PDF, Excel, or Word files into CWP-compatible digital Round Plans. By uploading documents and providing prompts, the system automatically generates structured Round Plans, reducing manual setup and ensuring consistency across operations.

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.
Deeper Visibility into How Users Engage with Inspection Workflows

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

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.
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 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.

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

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 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.

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

For more information, see View and Modify Offline Created Rounds *(on page 73)*.
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. For more information, see Log Shift Activities *(on page 107)*.
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. For more information, see Update User Preferences *(on page 114)*. • **Seamless Asset Integration**: Quickly scan asset or location IDs while creating issues or actions, eliminating manual entry errors and speeding up the documentation process. For more information, see Create an Issue *(on page 95)*. • **Plant-Level Asset Scanning**: Control Asset Scan functionality at the plant level by enabling or disabling it during plant creation or modification.
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. For more information, see Acknowledge the Shift Handover Report (Before Starting Rounds) *(on page 69)*.
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". For more information, see View User Profile *(on page 113)*.
Improved Shift Handover Management

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

• **Rich Text Formatting**: Transform shift logs with rich text formatting capabilities, including bold, italics, and structured lists. • **Flexible Submission Windows**: Set custom time buffers for submitting Shift Handover Reports (SHR) before and after a shift ends. (SHR Improvement). For more information, see Acknowledge the Shift Handover Report (Before Starting Rounds) *(on page 69)*.
Smarter Workflow Controls • **Advanced Conditional Logic**: Control the visibility of mandatory tasks, sections, and template-imported tasks using advanced logic, including "In Between" for precise numeric control, or "None" for empty selections without logic. • **Plant-Specific UI**: The app streamlines the interface by automatically adapting to your plant's configuration, showing only relevant unit and position options. For example, if a plant does not use units or positions, those options disappear, ensuring a simplified, intuitive experience for issue reporting and action creation.
Administrative & Data Management Enhancements • **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: • **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. For more information, see Create an Issue *(on page 95)*.
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:

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

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

For more information, see Change the Language *(on page 120)*.

Implemented Rapid Sync

Rapid Sync in the mRounds application enhances real-time data synchronization across multiple devices and servers, ensuring that critical information captured during operator rounds is updated instantly across the system.

How it benefits:

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

For more information, see Access Rounds in Offline Mode *(on page 73)*.

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.

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

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Create Real-Time Breakdown Alerts With Real-Time Breakdown Alerts, you can immediately notify operators about any equipment breakdowns. This feature ensures operators are alerted instantly, allowing them to respond quickly and reduce downtime, keeping operations running smoothly and efficiently. How it benefits: • **Faster Response Time**: Operators receive immediate notifications, minimizing delays in addressing issues. • **Reduced Downtime**: Quick action helps prevent prolonged operational disruptions, keeping productivity high. For more information, see Create an Issue *(on page 95)*.
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: • **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:

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

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

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.

Instant Issue Notifications for Faster Response

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

How it benefits:

- **Reduced Response Time**: Operators receive real-time alerts, enabling them to address issues as soon as they arise.
- **Minimized Downtime**: Faster notifications mean quicker issue resolution, keeping operations running smoothly.
- **Enhanced Productivity**: By preventing workflow interruptions, operators can maintain high productivity.

For more information, see Create an Issue *(on page 95)*.

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:

- **Improved Precision**: Operators are guided to the correct location, reducing the risk of performing tasks in the wrong area.
- **Accurate Data Collection**: Location validation ensures that data is collected from the intended site, leading to more reliable information.

For more information, see Create an Issue *(on page 95)*.

Plant-Specific Filters in Master Data, Reports and Dashboard

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

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.

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

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.

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

For more information, see Log in to the Mobile Application *(on page 52)*.

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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Self Assign Rounds from My Rounds This usability enhancement helps operators assign open rounds to self directly from the My Rounds screen. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
View Previous Exceptions to Readings When a reading is taken, the operator can now view previous exceptions to readings along with exception messages that are taken during previous shifts. This helps operators identify hazardous conditions of the equipment. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
View Multiple Lower and Upper Limits View multiple lower and upper limit range values and exceptions for numeric and slider responses while executing a round. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see Create an Issue *(on page 95)*.
Track Round Execution Duration Identify the duration of round execution. This helps users to optimize future rounds. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Setup Workflow Approval Configure workflow approval for round plan submissions and publishing. With proper work-flows, 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 cre-ating 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

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

Configure multiple lower and upper limit range values and exceptions for numeric and slider responses while creating a round plan.
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

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

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 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

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

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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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.

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

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Assign Actions to User Groups Create and assign actions to user groups in mobile application. This allows any operator in those groups to pick up and execute those actions. For more information, see Create Actions for Unresolved Issues or Tasks *(on page 101)*.
Add required notes in Shift Handover Reports Add and include required notes in the Shift Handover Report. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Sync Last N Task Reading in Online and Offline mode Sync "Last N Task Reading" in online mode and download them offline during initial sync by enabling the toggle button accessible in the User Preference screen. For more information, see Update User Preferences *(on page 114)*.
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.

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

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.
Configure Priorities for Issues and Actions at Tenant Level Set Priority dropdowns with color codes for Issues and Actions at the Tenant Level.
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.

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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
View Character Limits for Fields View character limits for each field, enter the right data, and maintain data integrity.

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

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Receive Instant Email Alerts • 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.
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

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

Review and acknowledge the previous shift's handover report before starting new rounds. This helps execute rounds with increased efficiency. For more information, see Acknowledge the Shift Handover Report (Before Starting Rounds) *(on page 69)*.
Add Documents to Task Responses Add attachments like documents to your Task responses and access them as links in the generated PDF for better communication and collaboration. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Add Real-Time Shift Log Entry Add shift logs with notes and observations to the Shift Handover Report during your shift. For more information, see Log Shift Activities *(on page 107)*.
Advanced User Access Control Select position and unit while logging in. This syncs the rounds by position and unit and eliminates unnecessary data. For more information, see Log in for the First Time *(on page 52)*.
Generate and Approve Shift Handover Report • Create a shift handover report with essential information like observations, comments, and responsibilities for smooth communication and knowledge transfer during shift changes. • View, download, and share shift handover reports in PDF via email for effective knowledge transfer. • Review and approve the details, like observations, notes, comments, etc, in the Shift Handover Report and address any issues or concerns, if any, to facilitate effective communication. • This helps supervisors be aware of any ongoing issues, pending tasks, or significant changes.

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

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.
Add Position Master Data • Add positions and assign them to users. • Create user groups and schedule rounds based on positions.

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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.

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

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

• Receive pop-up message while creating an issue for assets / locations that shows existing issues and lets you create new ones. • View the issue history or previously raised issues to avoid creating duplicates. • Create an issue at any time, regardless of previous issues raised. • View all past issues, even after new ones are raised. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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 • 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.

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.

Table 1-15 New Features and Enhancements in Release 2309 SP02 (continued)

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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.
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").

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. For more information, see Access Rounds in Offline Mode *(on page 73)*.

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

Enable / Disable application passcode screen Disable application passcode screen when user does not want it and enable network login ID and password to login. For more information, see Log in for the First Time *(on page 52)*.
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 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

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

Stay on top of team performance with comprehensive rounds reports. Supervisors can use these reports to monitor activities, pinpoint areas of improvement, and track tasks completion.

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. For more information, see Update User Preferences *(on page 114)*.
Access only user group specific rounds Access user group specific rounds for a tailored user experience. For more information, see About the Mobile Application Screens *(on page 60)*.
Detect anomalies early by checking historical data With access to historical data and trends for an asset, detect anomalies early and enforce appropriate maintenance tasks. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Capture detailed rounds data with additional data provided by the rounds planner View additional notes, labels, values in the Task Details screen that are provided by the rounds planner and capture detailed and valuable information. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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.

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

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Toggle themes for personalized experience Switch between Dark Mode and Light Mode themes depending on your preferences. For more information, see Switch Between Dark and Light Modes *(on page 118)*.
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.
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.
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.

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

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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Skip Rounds with a Reason Skip the round with an appropriate reason when the round is no longer required. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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.

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

For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Explore Dashboard with Interactive Graphs and Get Realtime Insights at a Glance • A dynamic pie chart displays rounds that are due today with Overdue, Assigned, In-Progress, Submitted, and Skipped statuses. • Tap the Assigned, In Progress, Submitted, Overdue, and Skipped legends to view the assigned, in progress, submitted, overdue, and skipped rounds. • Tap the widgets that display the count of Issues and Actions assigned to the operator to facilitate navigation to the respective screens. • Tap the Open Issues/Actions to see the list of open issues or actions from the dashboard. For more information, see About the Mobile Application Screens *(on page 60)*.
Section-wise task counts for enhanced progress tracking View the count of tasks on individual sections in a page for each round to clearly understand the task distribution and progress within the asset in the mobile application. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Switch Users Seamlessly from the lock screen You can handover your device to another user when the shift ends so that the other user can use the same device using their credentials. For more information, see Log in as a Different User (Shift Handover Scenario) *(on page 58)*.
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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see About the Mobile Application Screens *(on page 60)*.
View numeric historical data • View the history of numeric fields as a line chart for Number and Slider response types. • View the question name, operators who took the last 5 readings, and dates of the readings. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.

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

Enhanced PDF Preview Setup • Highlighted important fields such as Description, Asset, Location, and Priority of Issues & Actions. • Enriched PDF Preview with Photo & PDF attachments alongside textual content. • Incorporate visual cues for skipped Tasks, Assets, Locations and barcodes with reason codes.
Overdue status in Rounds • Overdue status indicates that a round has not been submitted before the due date. • The application hides Overdue and Submitted Rounds one day after their due date. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Enhanced Number Response Type Enter decimals and negative values as responses to tasks that have a number response type. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
Scan assets from Assets/Locations Route screen

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

• Scan Asset QR/Bar-codes for the list of Rounds for an asset. • Select the Round to access the asset form and enter task values. • Streamlined navigation between asset lists and rounds through QR/Bar-code Scan. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
View Start and Due Date/Time and start round • View Round details with Shift, Start date, Due Date, and Time slot in the Header. • Start rounds only after the designated Start Date/Time. • Overdue rounds automatically disappear from the mobile app after 24 hours. • Generate an Ad-hoc round with a 24-hour validity period. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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.
Embrace Control Over Rounds • View/modify Shift, Start Date & time, Due Date & time, and Assignee for each round. • Add a notification message whenever the Shift, Date, or time is changed. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
View Count of Questions on each Section

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

• View questions count on individual sections for each inspection in the mobile application. • Dynamic questions count adjustments for condition logics like Ask/Hide tasks. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.

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. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.

New Features and Enhancements in Release 2304

Table 1-21 New Features and Enhancements in Release 2304

View, Assign, and Execute Rounds

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

• View the list of rounds in Open Rounds. • Self-Assign rounds from Open Rounds. • View assigned rounds in My Rounds. • Unassign rounds to free them for reassignment. • Execute the assigned rounds by completing tasks and filling in the responses, and submit them. • Execute the rounds in the sequence of the Locations, Assets placed in the organization. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see Create an Issue *(on page 95)*.
Create, View, Assign, and Close Actions • Create actions to follow-up on issues. • View the list of actions in Open Actions. • Self-Assign actions from Open Actions. • View created and assigned actions in My Actions. • Work on the assigned actions and close them. • Start live conversation with assigned Users. • Create a Notification for an asset and sync it with backend ERP systems instantly. For more information, see Create Actions for Unresolved Issues or Tasks *(on page 101)*.
Productivity Enhancements

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

• View the maintenance route or assets and navigate quickly through asset locations. • View Asset Hierarchy to locate the asset. • Track task progress through the progress bar on the top. • Add notes, attachments, and media for additional information that helps execute rounds efficiently. For more information, see Execute Rounds with mRounds Mobile App *(on page 81)*.
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. For more information, see Access Rounds in Offline Mode *(on page 73)*.
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 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.

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

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 • 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.

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

Add, Search, View, and Edit Plants Data • Add, edit / modify plants' data. • Search plants and view details.
Add, Search, View, and Edit Asset Data • Add, edit / modify assets data. • Search assets and view details. • Bulk upload assets data through excel files.
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.
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.
Add, Search, View, and Edit Global Response Set Data • Add, edit / modify Global Response Set data. • Search Global Response Set data and view details. • Bulk upload Global Response Set data through excel files.
Onboard New Customers

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

• 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.
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.

1.4. System Requirements

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

System	Minimum Requirement
Compatible OS Platform and Version(s)	64-bit Windows and Macintosh
Compatible Form Factors	Desktop iOS - Tablets and Phones Android - Tablets and Phones
Compatible Device(s)	iOS 16 (and above), iPad Air (2 and above), iPad (5th gen and above), and iPad Mini (4 and above) All iPad Pro models iPhone 10 and above and iPhone SE2 Android 12

System	Minimum Requirement
	Samsung, Google, One Plus, ECom and iSafe devices that support Android 12 and above
Compatible Browser(s)	Chrome (Best view), Firefox, and Microsoft Edge
Device Storage and Memory Requirements	**Windows** 8GB RAM and a 64-bit operating system with an x64-based processor are preferred **Macintosh** 8GB RAM & 64-bit operating system **Mobile** Android: 6GB RAM and above iOS: 4GB RAM and above

2. Log in to the Mobile Application

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

This topic has the following sub-topics:

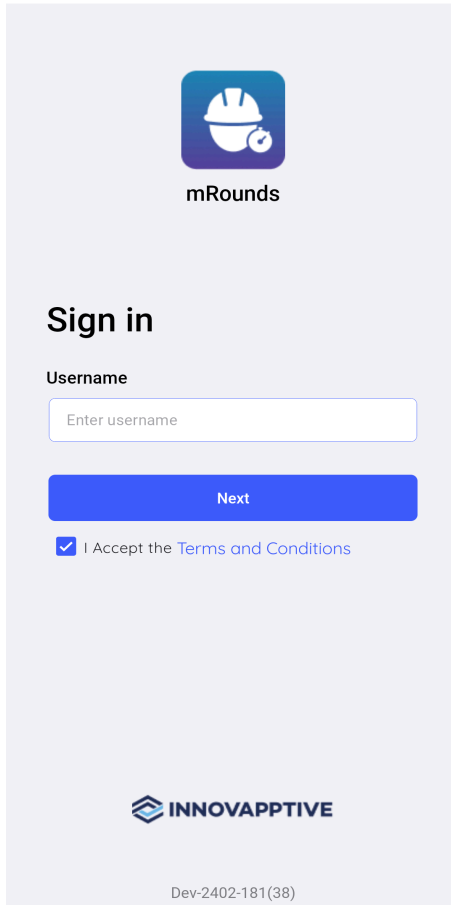
2.1. Log in for the First Time

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

To log in for the first time:

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

Figure 2-1 Enter Username

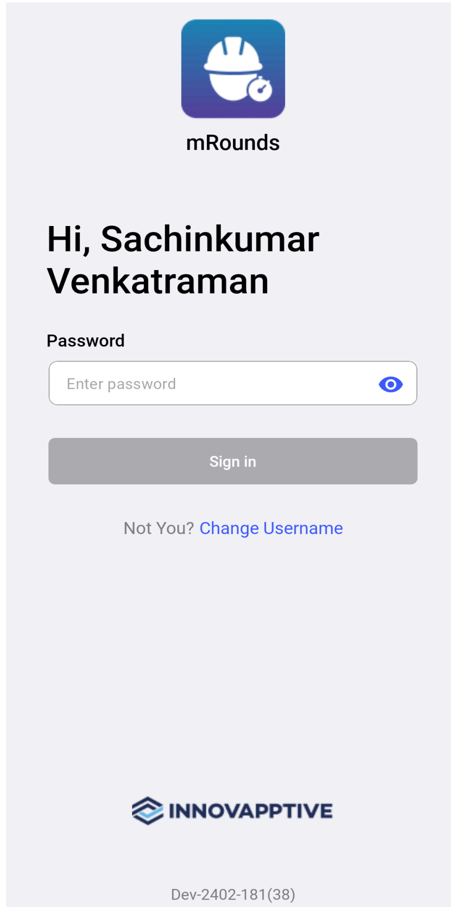


5. Tap **Terms and Conditions** to read End-User License Agreement (EULA) of Service.

Figure 2-2 Terms and Conditions

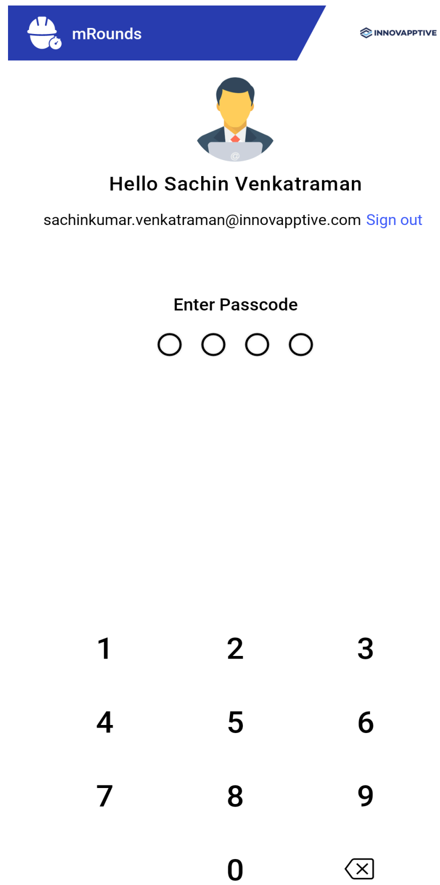
6. Tap **Next**.

Figure 2-3 Enter Password



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

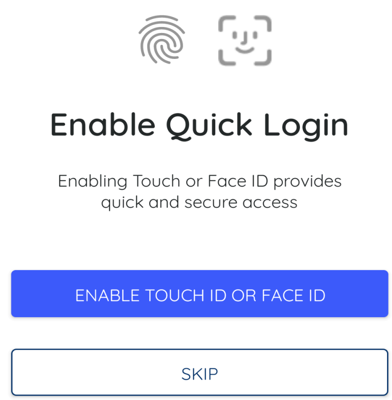
Figure 2-4 Create Passcode Screen



9. Create and confirm app passcodes.

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

Figure 2-5 Enable Touch ID or Face ID



10. In the **Enable Quick Login** screen, enable Face or Fingerprint identification for login access by tapping **Enable Touch ID or Face ID**.
11. In the **User Preferences** screen, select **Plant**, **Unit**, **Position**, **Shift**, and **Sync Task Reading History**. For more information, see Update User Preferences *(on page 114)*.
12. Tap **Save**.

    The application syncs the data based on the selected preferences and displays the Home screen. For more information, see Access Rounds in Offline Mode *(on page 73)*.

2.2. Log in with SAP IDP

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

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

To log in using SAP IDP:

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

    The application syncs the data based on the selected preferences and displays the Home screen. For more information, see Access Rounds in Offline Mode *(on page 73)*.

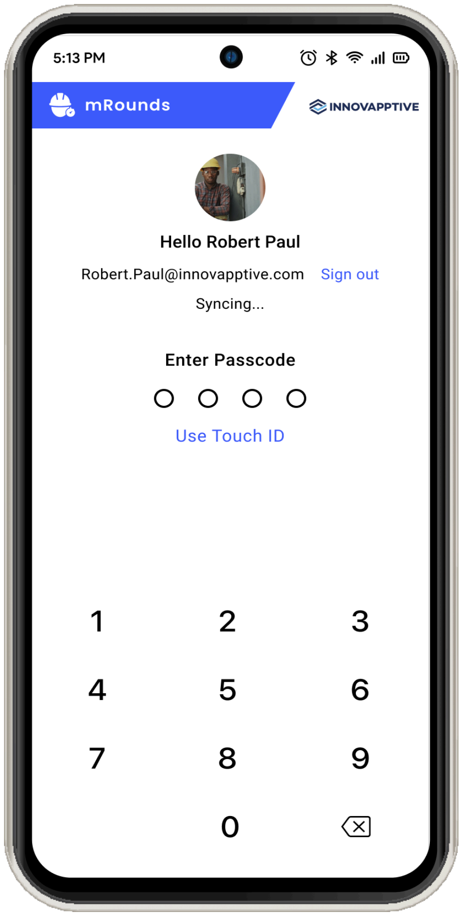
2.3. Log in as a Different User (Shift Handover Scenario)

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

To log in as a different user:

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

Figure 2-6 Login as a different user



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

3. About the Mobile Application Screens

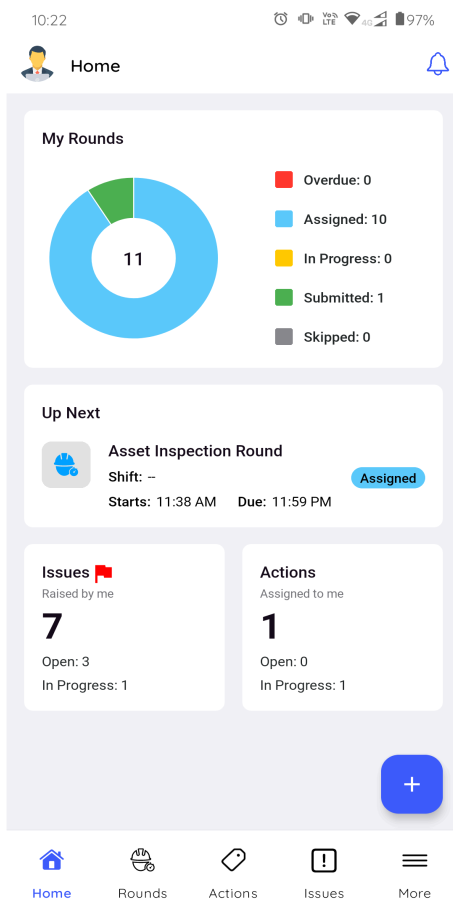
The mRounds application consists of five screens, each designed to help you efficiently manage rounds, execute rounds, create issues and actions, and update user preferences. Below is a detailed overview of each screen.

Monitor your Tasks (Home Screen)

The **Home** screen gives you a quick overview that helps you plan your day. Use the home screen to:

- **Track Your Rounds:** View assigned rounds by status — Overdue, Assigned, In Progress, Submitted, and Skipped.
- **Check Task Progress:** See a percentage and progress bar on each round or task card.
- **Review Upcoming Tasks:** Check what is scheduled for the day and plan ahead.
- **View Assigned Items:** View the total number of Issues and Actions assigned to you.
- **Create New Entries:** Create new entries like Issues, Actions, or Shift Logs by tapping the + icon.

Figure 3-1 mRounds Home Screen



View Assigned Rounds & Self Assign Rounds (Rounds)

The **Rounds** screen has two two tabs: **My Rounds** and **Open Rounds**.

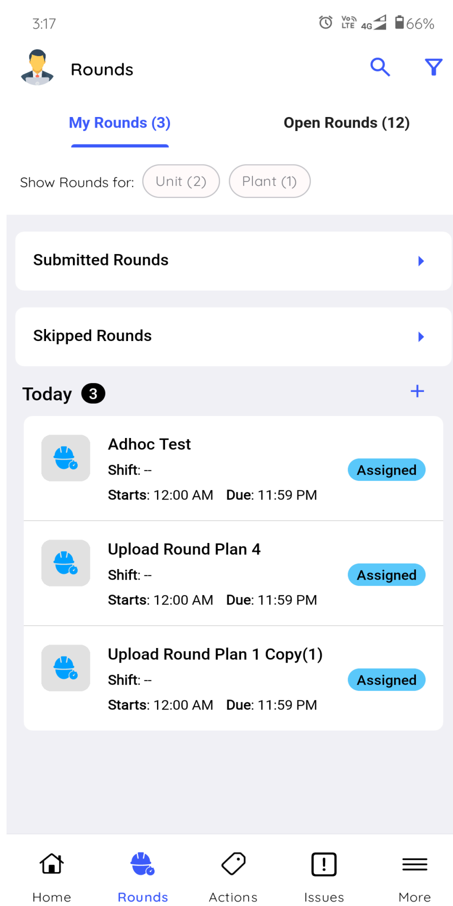
My Rounds

View rounds assigned to you, grouped by Start or Due Date & Time.

- **Search and Filter:** Find rounds using the search bar or filter by Due Date and Status.
- **Review Submitted or Skipped Rounds:** View those lists by tapping the respective options.
- **Submit Overdue Reason:** Open the round, tap the **More** icon (⋮) on the top-right, and select **Overdue Reason**.
- **Submit After Due Time (If Allowed):** If buffer time is configured by your supervisor, complete and submit even after the due time.

> **Note:**
> Rounds that are overdue, skipped, or submitted are removed from the list after 24 hours.

Figure 3-2 My Rounds

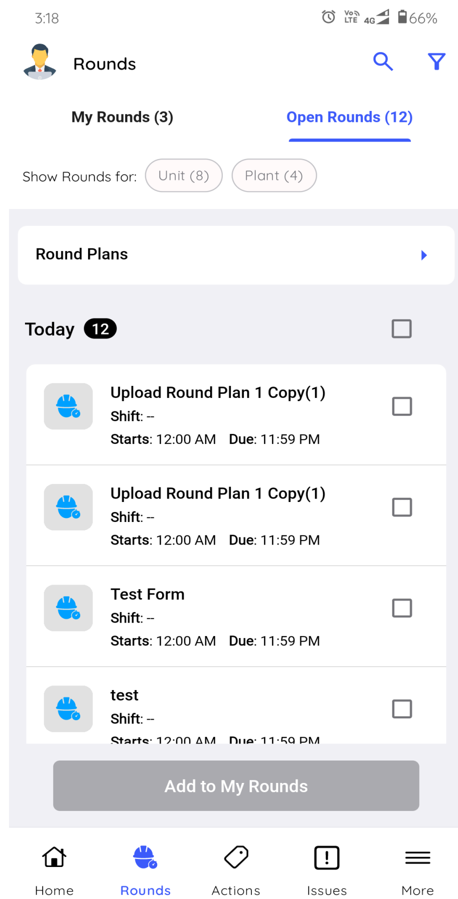


Open Rounds

View and self-assign rounds that are currently unassigned.

- **Assign Yourself a Round:** Tap a round from the list to take ownership.
- **Search and Filter:** Use the search bar or filter by Due Date, Created By, or User Group status.
- **Generate Ad-Hoc Rounds:** Tap **Round Plans** to view available plans and create ad-hoc rounds as needed.

Figure 3-3 Open Rounds



View Assigned & Unassigned Actions

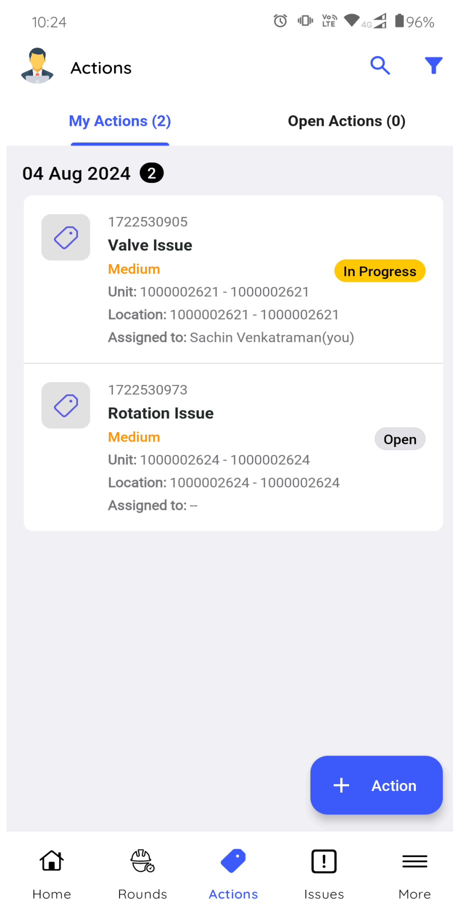
The Actions screen is divided into two tabs: **My Actions** and **Open Actions**.

My Actions

Track actions that are assigned to you or created by you.

- **Search and Filter Actions:** Use the search bar or apply filters like Due Date, Priority, Status, Plant, Location, Asset, Assignee, and more.
- **Narrow Your View:** View only actions assigned to you, created by you, or hide resolved items.
- **Create a New Action:** Tap the + icon in the My Actions tab.

Figure 3-4 My Actions

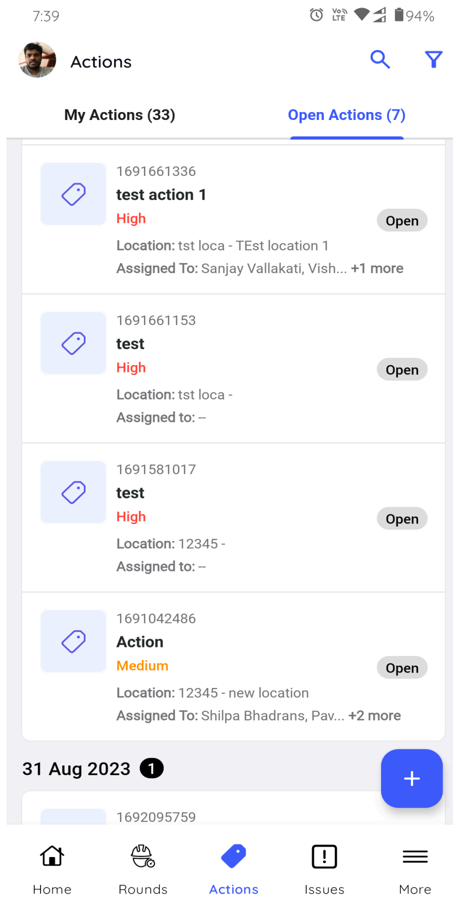


Open Actions

Pick up unassigned actions that require attention.

- **Search and Filter Actions:** Use the search bar or apply filters such as Due Date, Priority, Status, Plant, Location, Asset, and more.
- **Narrow Your View:** Show only actions created by you, or hide resolved items.
- **Create a New Action:** Tap the + icon in the Open Actions tab.

Figure 3-5 Open Actions



View Assigned & Unassigned Issues

Issues are created when anomalies are identified during maintenance checks. Supervisors assign them to operators for follow-up. As an operator, you can also update the issue log to track progress.

The Issues screen is divided into two tabs: **My Issues** and **Open Issues**.

My Issues:

Track issues assigned to you or created by you.

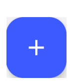
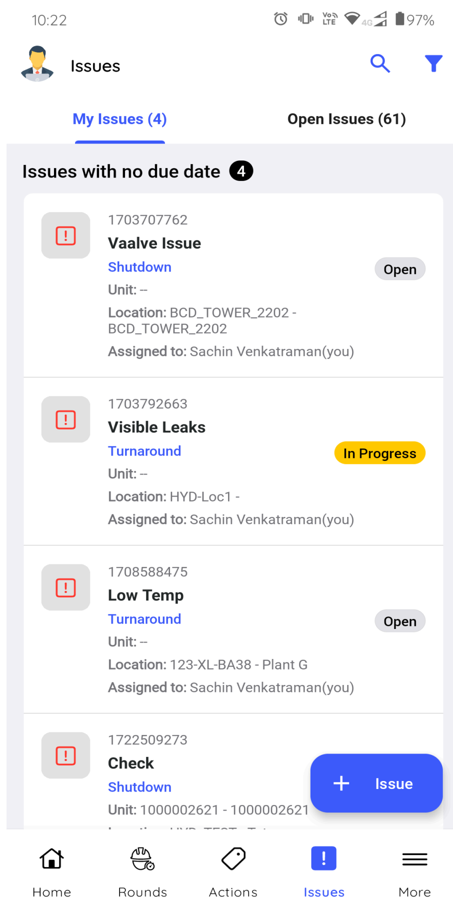
- **Search and Filter Issues:** Use the search bar or apply filters like Due Date, Category, Priority, Status, Plant, Location, Asset, and Assignee.
- **Narrow Your View:** Show only issues assigned to you, created by you, or hide resolved issues.
- **Create a New Issue:** Tap the  icon in the My Issues tab.

Figure 3-6 My Issues

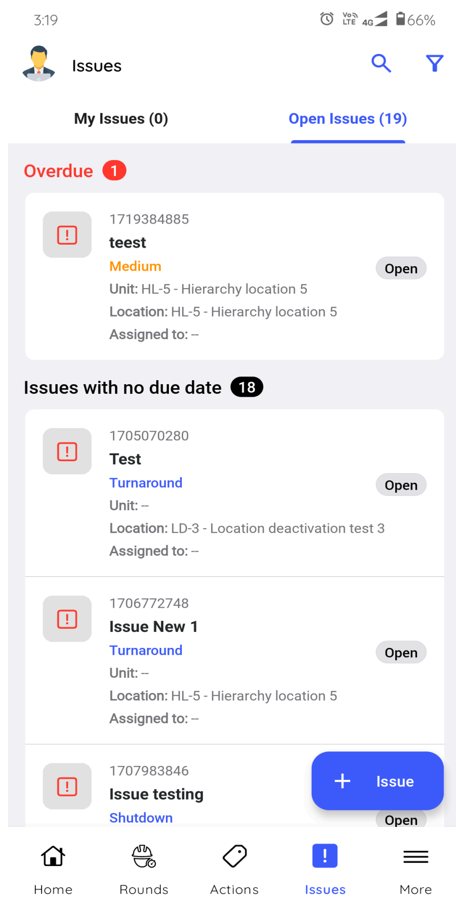


Open Issues

View unassigned issues created by other operators.

- **Search and Filter Issues:** Use the search bar or filter by Due Date, Category, Priority, Status, Plant, Location, Asset, and more.
- **Narrow Your View:** Show only issues created by you, or hide resolved issues.
- **Create a New Issue:** Tap the + icon in the Open Issues tab.

Figure 3-7 Open Issues



Access Shift Handover Reports and Logs (More Screen)

Use the **More** screen to manage shift-related entries and reports.

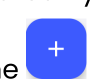
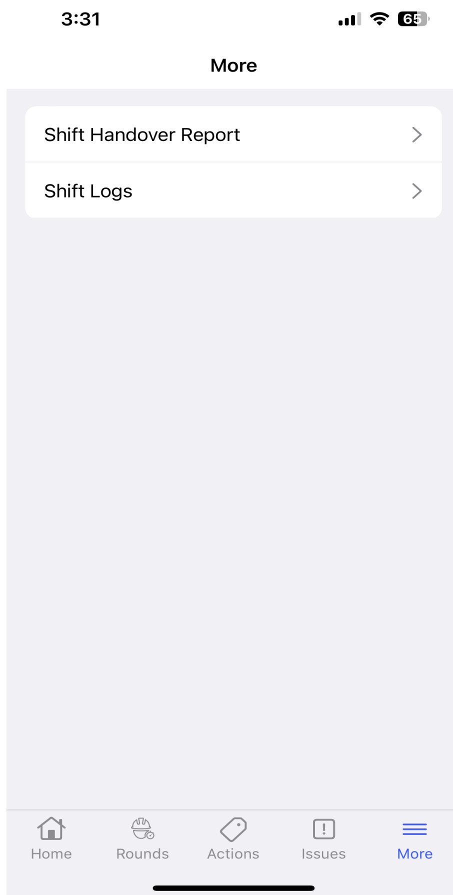
- **View Shift Handover Reports and Shift Logs:** See a list of past reports and logs.
- **Search and Filter Entries:** Use the search bar or filter by Due Date, Category, Priority, Plant, Location, Asset, and Created By.
- **Create a New Shift Log:** Tap the  icon to log shift details and observations.

Figure 3-8 More Screen



4. Acknowledge the Shift Handover Report (Before Starting Rounds)

Before you can begin executing round tasks, you must review and acknowledge the **Shift Handover Report** from the outgoing supervisor. This report summarizes completed tasks, outstanding items, unresolved issues, and any additional notes or attachments.

As the **incoming supervisor**, you must:

- **Review the Handover Report:** Check all completed and pending items, notes, and attachments.
- **Acknowledge the Report:** Confirm review to enable round execution.
- **Take Ownership:** Accept responsibility for unresolved items and ensure smooth continuity.

> **Note:**
> You **cannot start a round** until you acknowledge the Shift Handover Report. The **Start Round** button remains disabled until this step is completed.

To view and acknowledge the shift handover report:

In the **Home** screen (Dashboard), tap the **View & Accept**.

Or

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

| 4 - Acknowledge the Shift Handover Report (Before Starting Rounds)

Figure 4-1 Shift Handover Reports

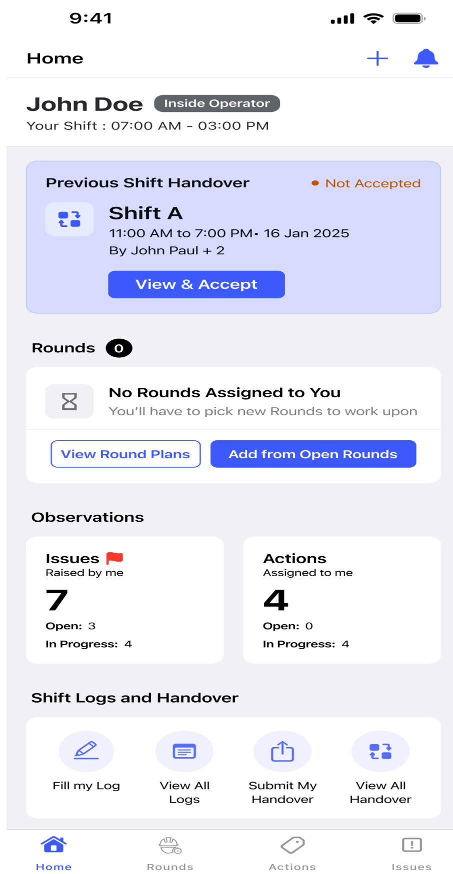
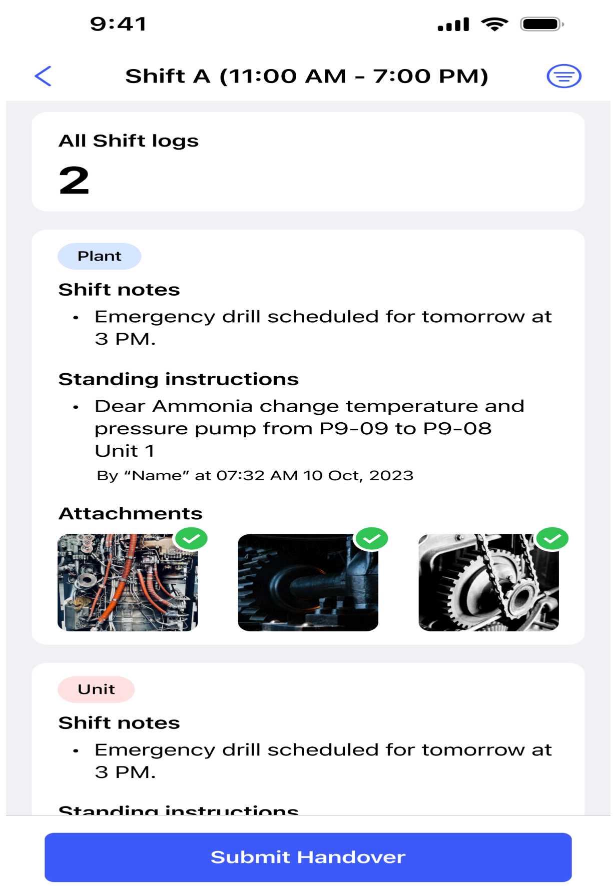


Figure 4-2 Acknowledged Shift Handover Report



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

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

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

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

At the Start of Your Shift

- **Review the Handover Report:** Check all pending tasks, unresolved issues, and any notes or attachments from the outgoing operator.
- **Tap Accept Handover:** Confirm that you accept responsibility for the handover. → The status changes to **Not Submitted** on the Dashboard, and the **Start Round** button becomes active.

At the End of Your Shift

- **Complete All Assigned Rounds:** Ensure all tasks are executed as per schedule.
- **Tap Submit Handover:**Submit the handover report to the next supervisor before ending your shift.

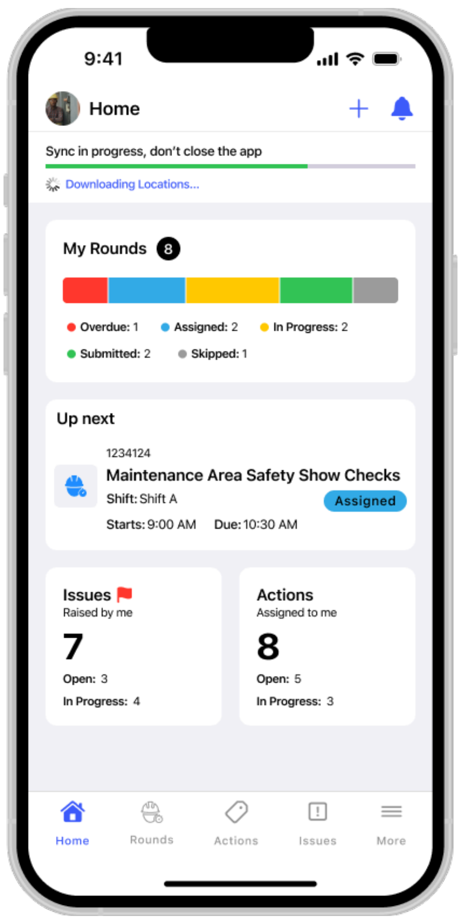
5. Access Rounds in Offline Mode

The **mRounds mobile app** is designed to work seamlessly, even in areas with poor or no network connectivity.

When you log in, the app automatically connects to the server and downloads the required data to your device. As an Operator, you can then carry out all assigned round tasks offline without interruption.

Once your device reconnects to the internet, all updates are synced automatically, ensuring the server reflects your latest activity and you always have access to up-to-date data.

Figure 5-1 Offline Sync



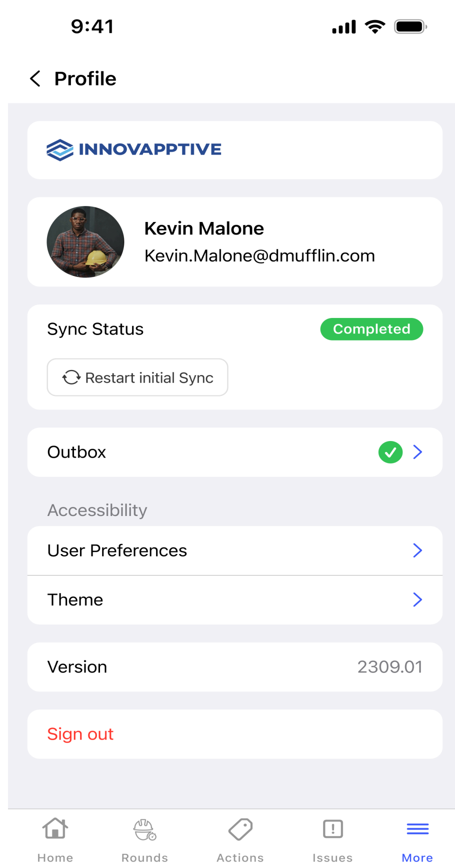
5.1. View and Modify Offline Created Rounds

When you create or modify rounds while offline, your changes are automatically saved to your device. Once you reconnect to the internet, these modifications are automatically synced with servers, ensuring complete storing of rounds history.

To review rounds created during offline:

1. Navigate to the **User Profile** screen.
2. Tap on the **Outbox** option.

Figure 5-2 Offline Outbox



3. Review the list of pending rounds waiting to be synchronized.
   The Outbox displays all rounds created or modified without network connectivity. Each entry shows the round details and current sync status, allowing you to monitor your offline work until synchronization is complete.
   - You can continue modifying offline rounds even before they sync.
   - Synchronization happens automatically in the background when connectivity is restored.

6. Self Assign and Unassign Rounds

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

This section has the following topics:

6.1. Assign Open / Unassigned Rounds to Yourself

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

To self-assign a round:

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

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

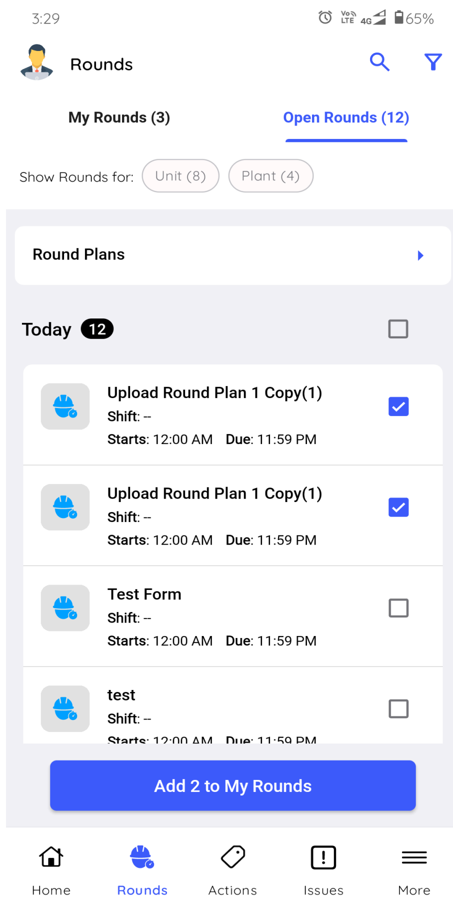
3. In the **Round Details** screen, verify the details and tap **Add to My Rounds**.

   Or

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

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

Figure 6-1 Self-assign Rounds



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

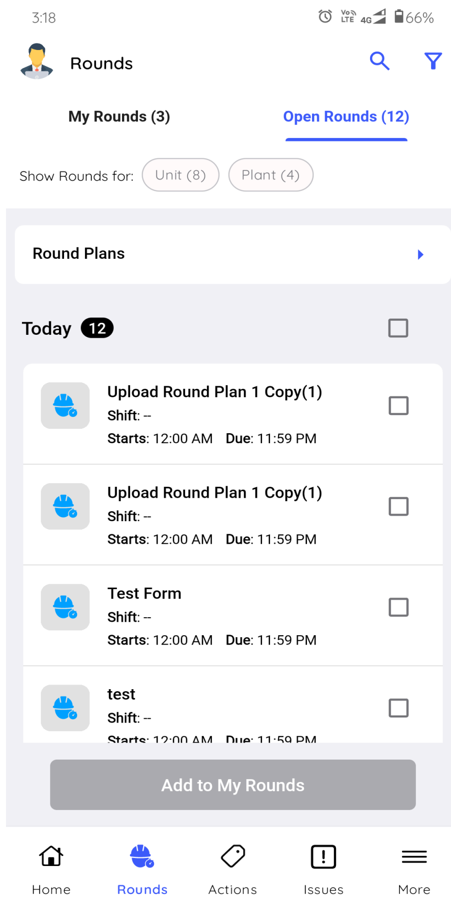
6.2. Create Ad-Hoc Rounds

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

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

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

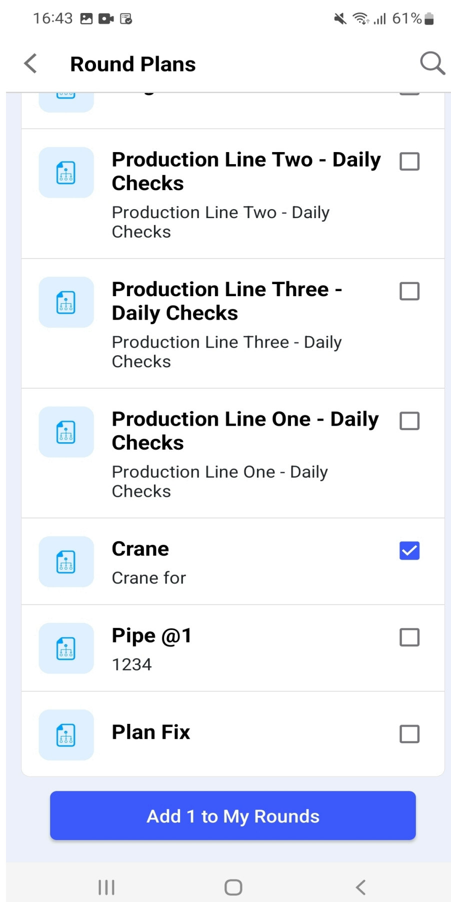
Figure 6-2 Round Plans Section



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

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

Figure 6-3 Select Rounds



4. Tap the **Add to My Rounds** button.
5. From the list, select a round and tap **Start Round** on the Round Details screen. In the Review Timing window, you can modify Due Date & Time as needed and tap **Done**.

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

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

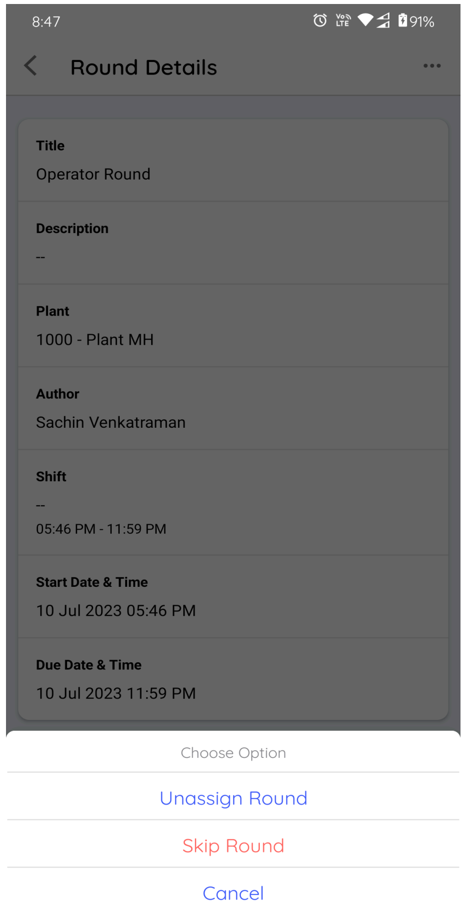
6.3. Unassign Assigned Rounds

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

To un-assign an Assigned round:

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

Figure 6-4 Unassign Assigned Round



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

4. Tap **Unassign**.

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

6.4. Unassign In Progress Rounds

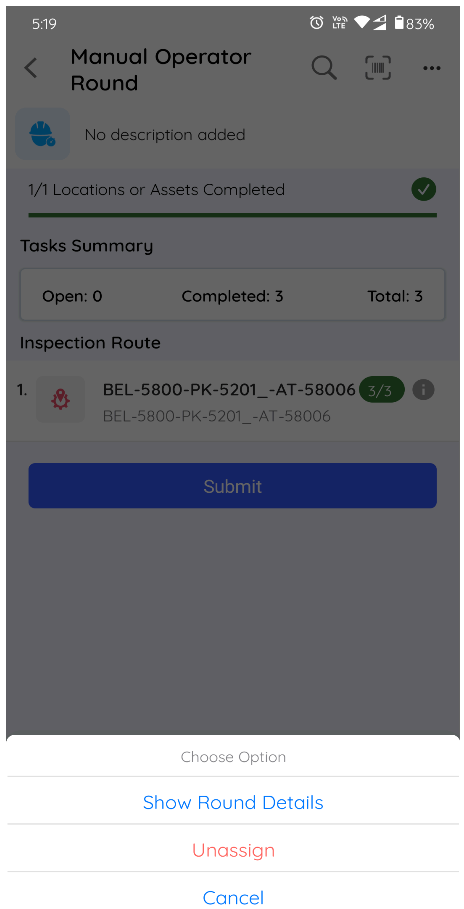
If unable to work on assigned rounds, you have the option to un-assign them, allowing other operators to take over and complete the rounds.

This feature enables reassignment flexibility, facilitating maintenance scheduling adjustments.

To un-assign an In-Progress round:

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

Figure 6-5 Unassign In-progress Round



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

5. Tap **Unassign**.

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

7. Execute Rounds and Record Asset Data

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

This section has the following topics:

7.1. Execute Rounds with mRounds Mobile App

As an Operator, your primary task is to execute rounds that have been pre-configured by Supervisors. These rounds are designed to capture accurate asset data using a variety of **response types** — such as scanning barcodes, capturing photos, recording measurements, or confirming your location with geo-tagging. Each response type serves a specific purpose based on the asset and inspection requirements.

The app also uses conditional logic to guide you during execution. If any response you enter falls outside acceptable limits, the system automatically triggers alerts or follow-up actions.

Important: You'll receive a **push notification** one hour before an assigned round becomes overdue. Tap the notification to immediately access and act on the round, issue, or action — so nothing critical is missed.

For smooth and accurate execution, follow the step-by-step instructions provided in the sections that follow.

Find the Ideal Route

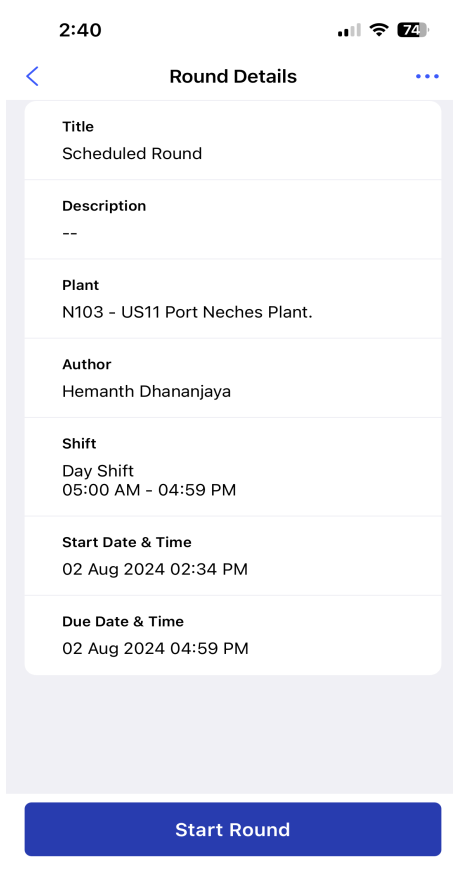
Before starting the round, determine the ideal route for completing the tasks efficiently. This ensures that all tasks are completed in the most logical and time-saving manner.

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

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

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

Figure 7-1 Start Round



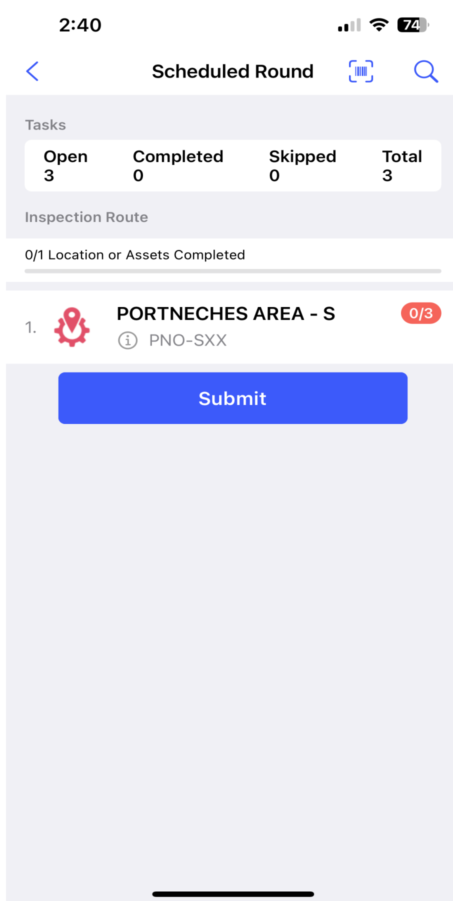
3. Tap **Start Round**.

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

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

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

Figure 7-2 Assets Route



In this screen, you can,

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

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

Scan and Verify Assets

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

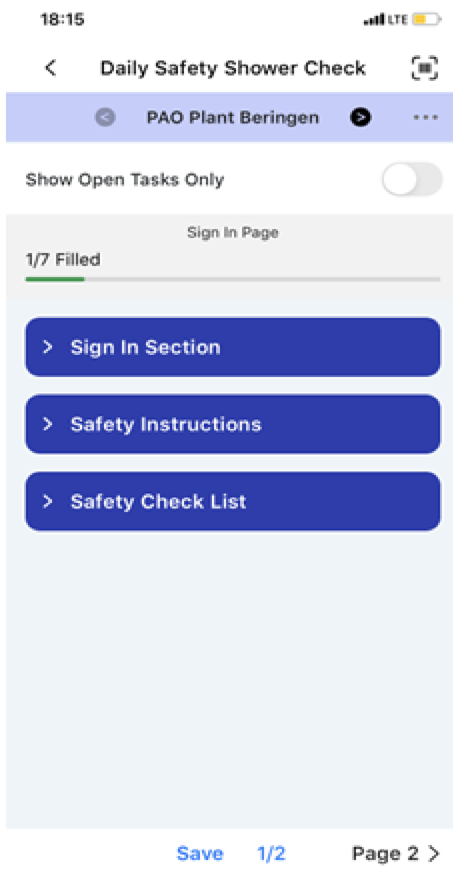
- Out of service
- Damaged barcode
- Inaccessible location
- Turnaround period
- Other (specify reason)

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

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

   The round tasks assigned to the asset are displayed.

Figure 7-3 Asset Details with Tasks



Productivity Hacks:

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

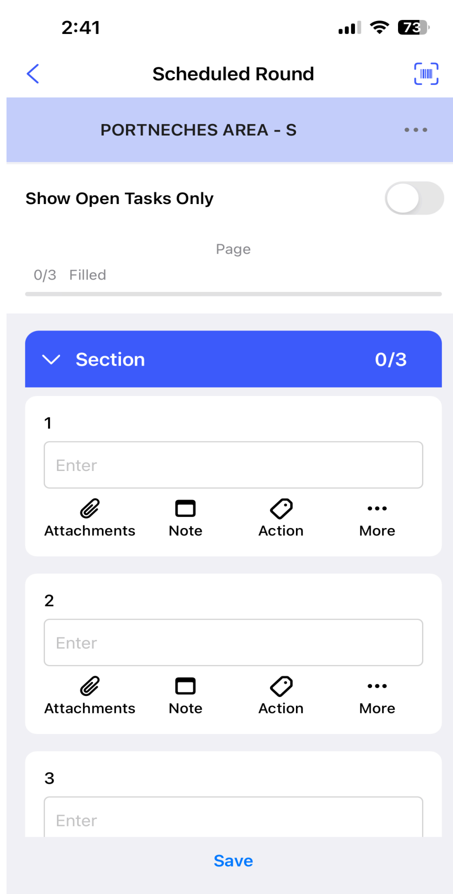
Note:

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

Execute Rounds

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

Figure 7-4 Expand Sections



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

   The choices are

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

     You can track and report execution times at the Round Plan, Location, and Asset levels.
   - Slider

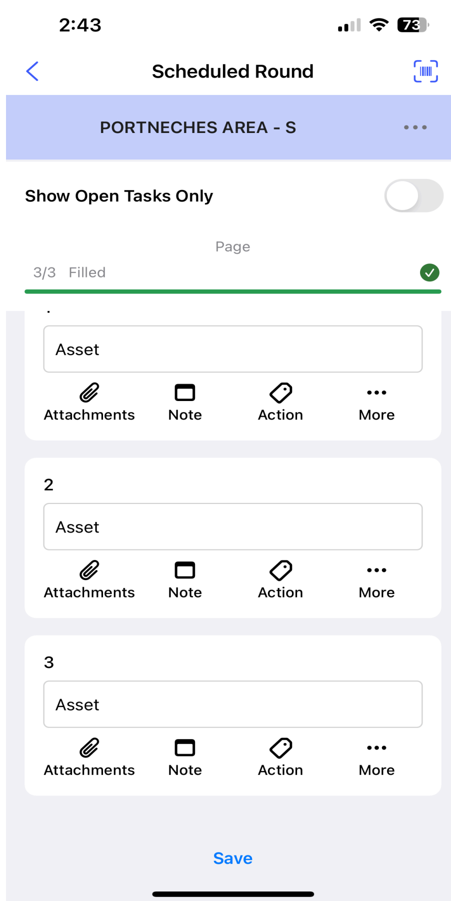
     > **Note:**
     > The previous readings are presented as a line chart for Number and Slider response types, highlighting past readings or transactions. The charts display task names, dates, readings, and operators for each entry, providing detailed insight into the data history. You can quickly compare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

   - Geo Location

     Precisely tracks asset locations during rounds. Toggle this GPS coordinate recording feature on/off in settings based on operational needs or privacy requirements.
   - Date Range
   - Photo
   - Signature
   - Hyperlink
   - Instructions
   - Multiple Choice
   - Global Picklist

> **Note:**
> You can enter decimal and negative values when filling tasks that have a number response type.
>
> The auto-scroll option allows you to automatically scroll to the next unanswered question when a response is provided for specific input types.

Figure 7-5 Fill Responses and Execute Tasks



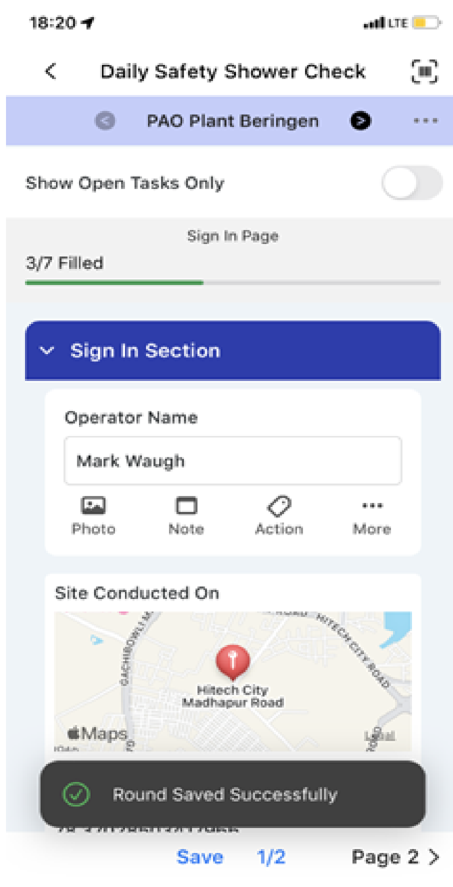
Productivity Hack:

- You can tap the **Actions** icon to create an action for the asset while executing a round. For more information, see Create Actions for Unresolved Issues or Tasks *(on page 101)*.
- Tap the **More** ●●● icon > **Create Issue** to create an issue for the asset. For more information, see Create an Issue *(on page 95)*.
- Tap the **More** ●●● icon > **Show Additional Details** to view additional details or more information regarding the task.

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

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

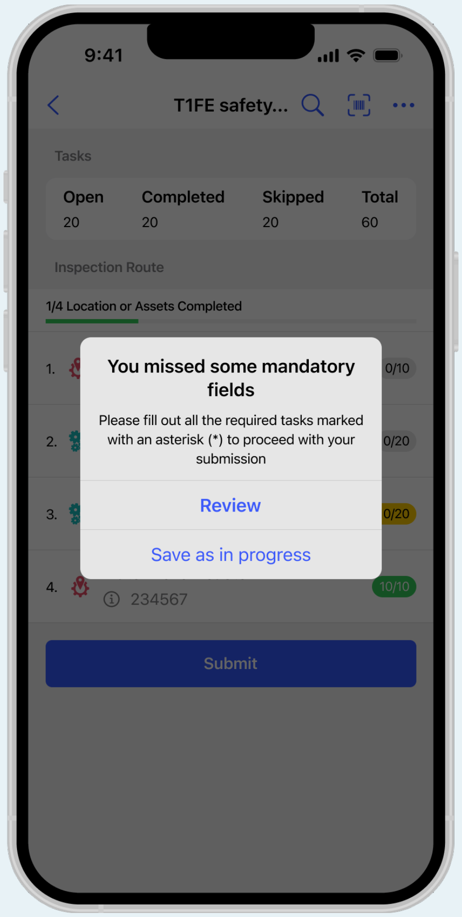
Figure 7-6 Save Round



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

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

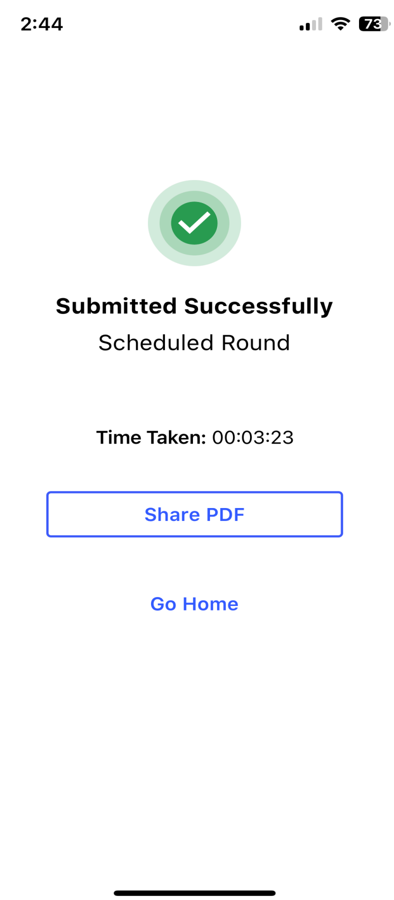
Figure 7-7 Submit Round



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

5. Tap **Submit**.

Figure 7-8 Submit Round Success Message



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

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

7.1.1. Prepare Shift Handover Report

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

To prepare shift handover report:

1. Tap the **Attachments** icon to add photos, videos, audios (up to 1 minute), and documents (PDF, Word, or Excel) of an asset or equipment.

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

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

7.2. Generate Submitted Rounds in PDF Format

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

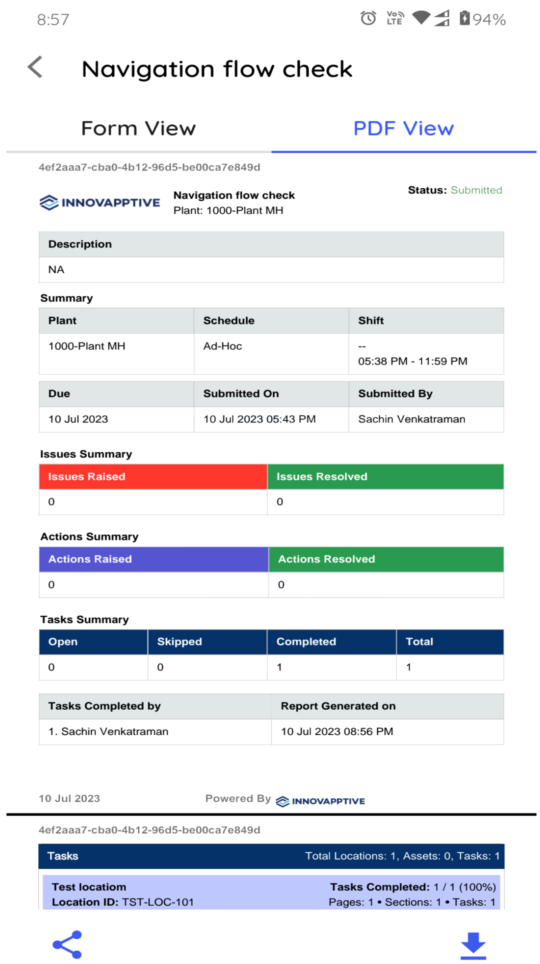
To generate and share the submitted rounds in PDF format:

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

> **Note:**
> Tap the More icon on the top right corner to download the PDF or share the PDF.

4. In the **Form View** tab, select each asset to view the submitted round details in Form format.
5. Tap the **PDF View** tab.
   A message "PDF Generated Successfully" appears, and you can view the submitted round details in PDF format.

Figure 7-9 View Round in PDF Format



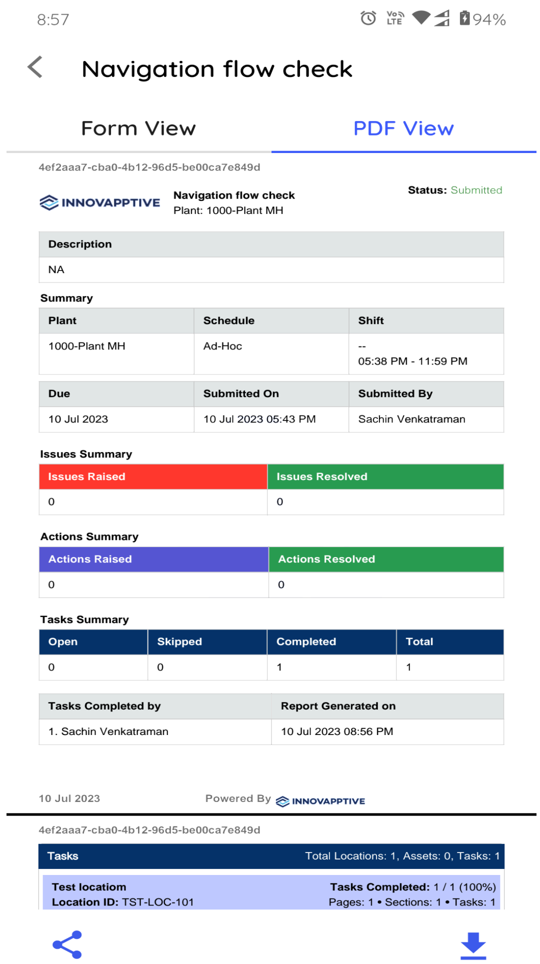
7.3. Share PDF Report with Stakeholders

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

To share a report in PDF format with stakeholders:

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

Figure 7-10 View Round in PDF Format



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

   You can configure the PDF in the web application as needed.

8. Create and Manage Issues

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

This chapter has the following topics:

8.1. Create an Issue

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

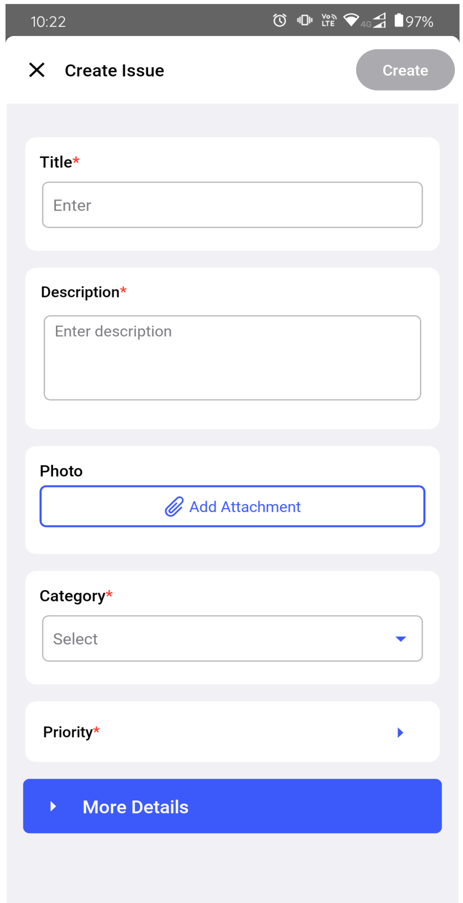
To create an issue:

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

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

   e. Select the **Priority** and select the **Event Execution** as **Shutdown**, **Turnaround**, or **General** from the list.

Figure 8-1 Create Issue



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

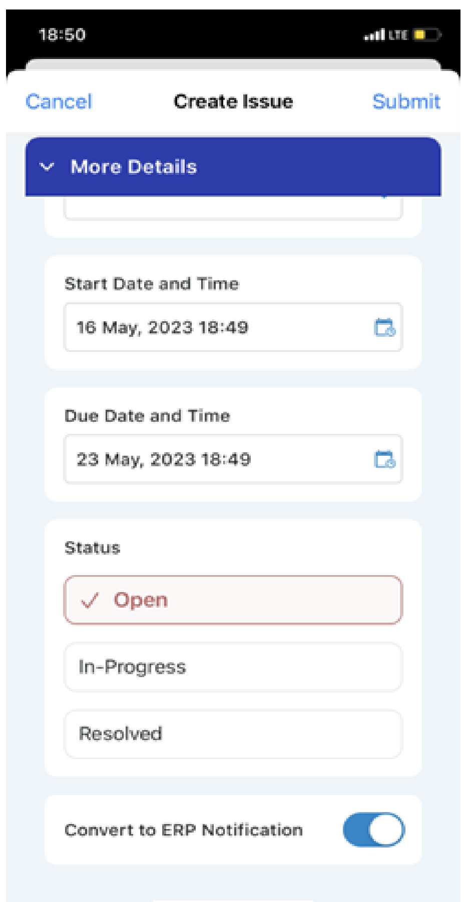
i. Select the **Plant**, **Unit**, **Location**, and **Asset** from the respective dropdowns.

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

ii. Select an operator from the **Assign to** drop-down to assign the issue. Tap **Save** once you select the users.
iii. Select the **Start Date and Time**.
iv. Select the **Due Date and Time**.
v. Select the **Status** as **Open**, **In-Progress**, or **Resolved**.

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

Figure 8-2 Fill More Details



3. Tap the **Create** button on the top right.
   A Issue Created Successfully message appears and you can see the newly created issue in the **Open Issues** tab. If the issue is assigned to you then you can see it in the **My Issues** tab.

> **Note:**
> - You can tap the help icon to see the instructions to determine risk matrix based Priority.
> - The following data is automatically updated in the notification:
>   - The Priority determination values are updated to field TechInspectn by (VIQMEL-INSPK).
>   - The Selected RISK matrix is updated in the Notification Long text.
>   - For the Shutdown and Turnaround Priorities, if you select the consequence Impact, likelihood, and Spare availability, are available and mapped to SAP Accordingly.
> - The Required Start date, End Date, Priority, and Photo attachments of the Notification get reflected in the SAP. Also, the Maintenance Plant Field mapping to the Location tab happens in Notification.
> - You can view and execute plant-specific data while ensuring seamless integration with SAP for issue creation across different plants, supporting custom fields, default values, help texts, and auto-fill conditions to maintain accurate and consistent issue recording.

8.2. Self-Assign an Unassigned Issue

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

To self-assign an issue unassigned issue:

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

   Figure 8-3 Issues Log History

2. Tap the **Details** button on the top right.
   Issue Details screen is displayed.
3. Tap the **Edit** button on the top right.
4. In the **Assigned to** field, select your username.
5. Change the status of the issue to **In Progress**.
6. Tap the **Save** button.

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

8.3. Resolve and Close an Issue

You can close an issue once it is resolved.

To resolve and close the issue:

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

   Figure 8-4 Issues Log History

2. Enter the text in the text box and tap the Enter  icon to provide the updates related to the issue to your supervisor. You can also add images as evidence.
3. Tap the **Details** button on the top right.
4. In the **Issue Details** screen, tap the **Edit** button on the top right.
5. Expand the **More Details** section, update the details and change the **Status** to **Resolved** when the issue is resolved.
6. Tap **Save**.

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

9. Create and Manage Actions

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

This chapter has the following topics:

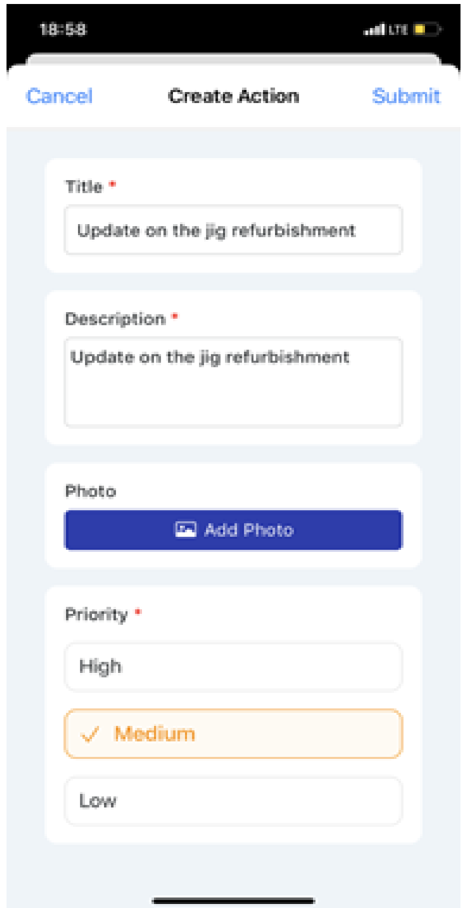
9.1. Create Actions for Unresolved Issues or Tasks

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

To create an action:

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

Figure 9-1 Create Action



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

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

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

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

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

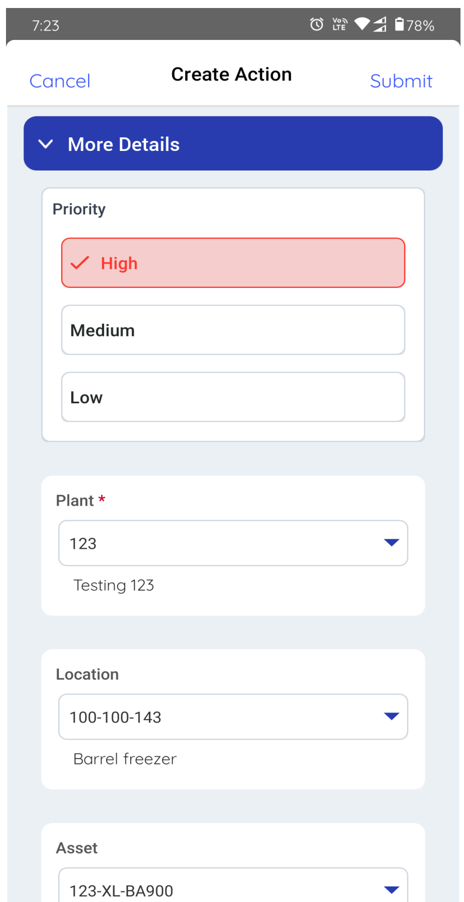
  Or

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

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

i. Select the **Due Date and Time**.
ii. Select the **Status** such as **Open**, **In-Progress**, or **Resolved**.

Figure 9-2 More Details



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

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

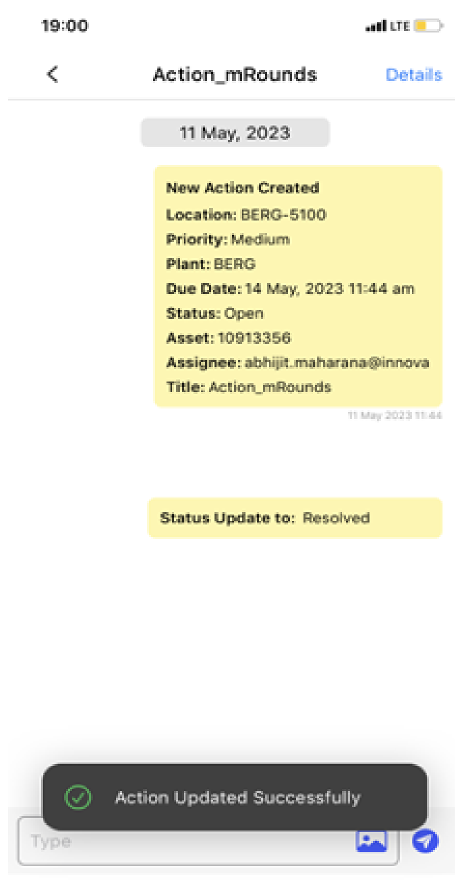
9.2. Self-Assign an Unassigned Action

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

To self-assign an unassigned action:

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

   Figure 9-3 Actions Log History

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

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

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

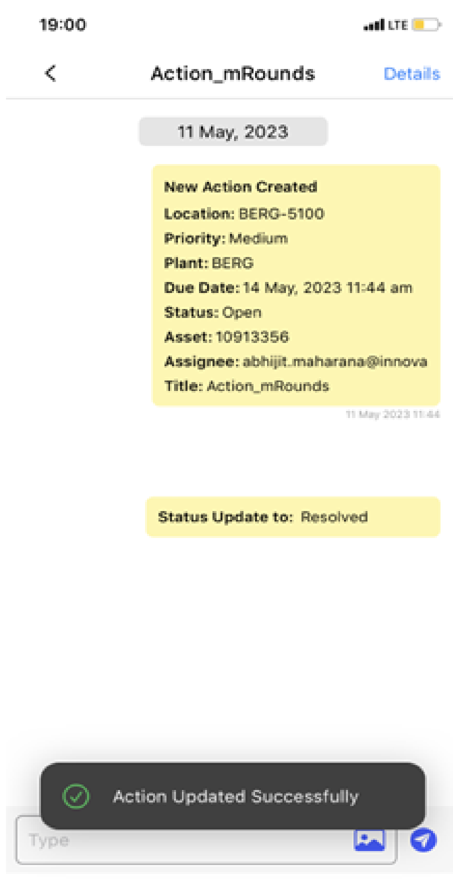
9.3. Resolve and Close an Action

You can close an action when it is resolved.

To resolve and close the action:

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

   Figure 9-4 Actions Log History

2. Enter the text in the text box and tap the Enter  icon to provide the updates related to the action to your supervisor. You can also add images as evidence.

3. Tap the **Details** button on the top right.
4. In the **Action Details** screen, tap the **Edit** button on the top right.
5. Expand the **More Details** section, update the details and change the **Status** to **Resolved** when the action is resolved.
6. Tap the **Save** button.

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

10. Log Shift Activities

Shift logs provide a critical record of all activities and events that occur during your shift. These detailed records document actions taken, issues encountered, and task status, creating an essential information bridge between you, your team members, and supervisors. Shift logs help you:

- **Track Progress:** Monitor ongoing operations and identify problems requiring attention.
- **Coordinate Teams:** Ensure all team members stay informed about current priorities.
- **Enable Smooth Handovers:** Provide incoming shifts with clear visibility of completed work and pending issues.
- **Maintain Accountability:** Create a reliable record of when and how situations were addressed.

You can view and complete only the shift log entries relevant to your assigned unit. This functionality helps you with the following:

- **Filter Automatically:** Access only shift logs associated with your designated unit upon login.
- **Reduce Confusion:** Focus solely on information relevant to your responsibilities.
- **Display Tasks Conditionally:** View tasks that appear, remain hidden, or become mandatory based on template configuration.

To add shift logs:

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

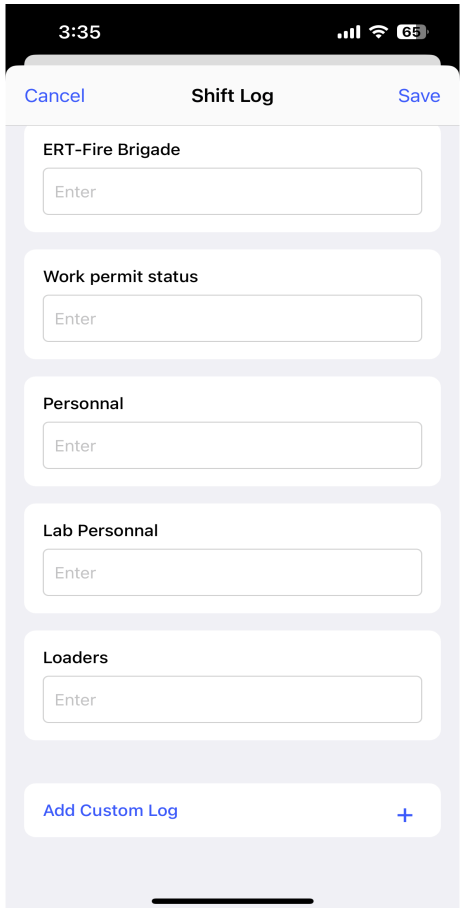
   Note:

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

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

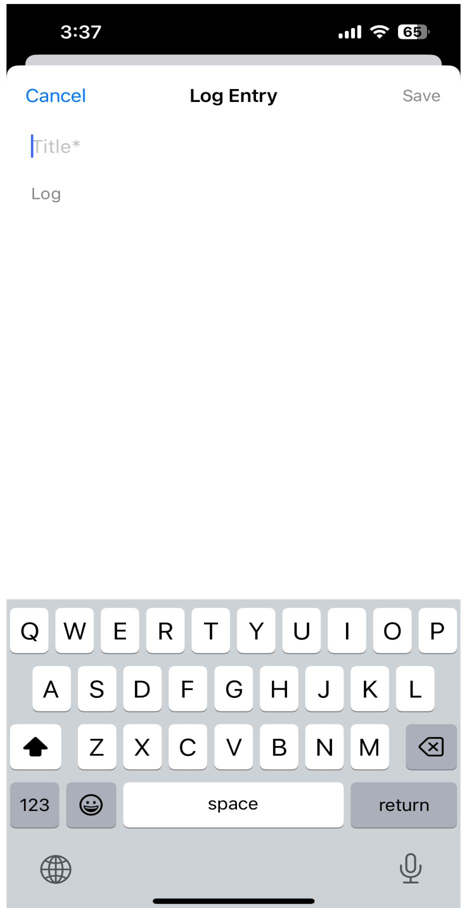
a. Add the shift log details in the pre-defined template.

Figure 10-1 Add Shift Log



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

Figure 10-2 Add Custom Log

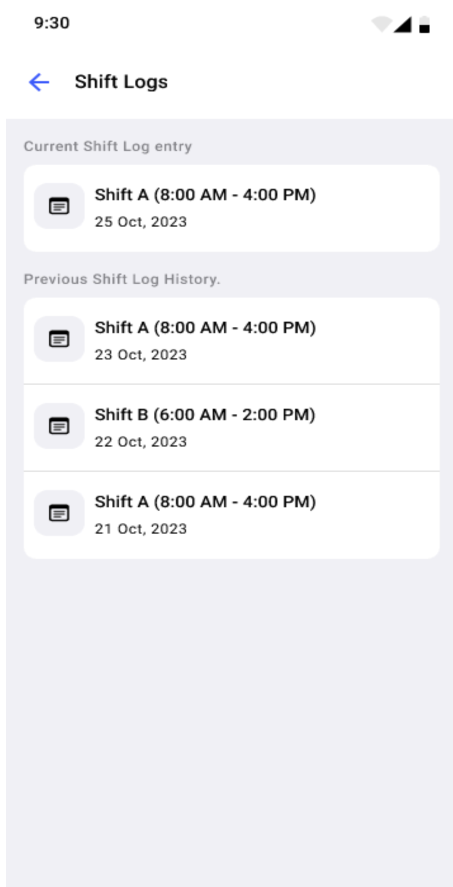


c. Tap **Done**.

3. Tap **Save**.

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

Figure 10-3 Shift Logs Screen



11. Find and Manage Rounds, Issues, and Actions

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

This chapter has the following topics:

11.1. Search for a Round, Issue, or Action

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

To search rounds, issues, and actions:

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

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

11.2. Apply Filters to Refine Results

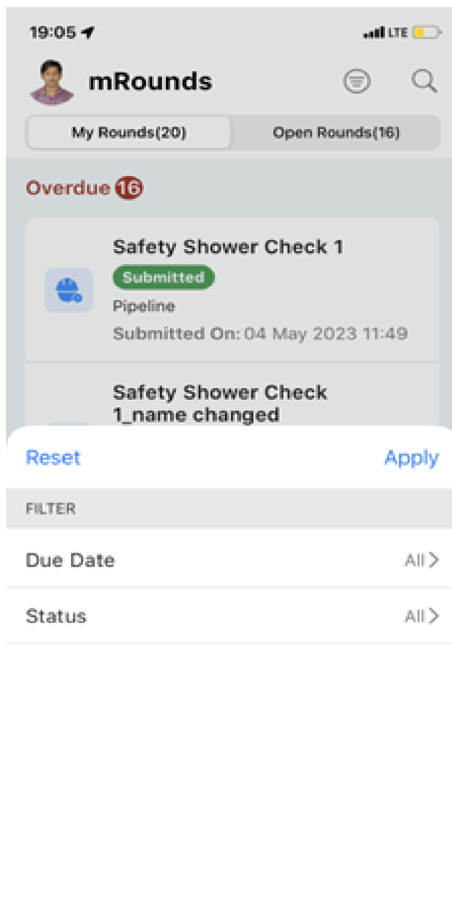
Filter helps you locate specific information quickly within extensive search results.

To filter rounds, issues, and actions:

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

   Tap **Reset** to clear the filter.

Figure 11-1 Filter My Rounds



12. Customize User Settings

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

This chapter has the following topics:

12.1. View User Profile

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

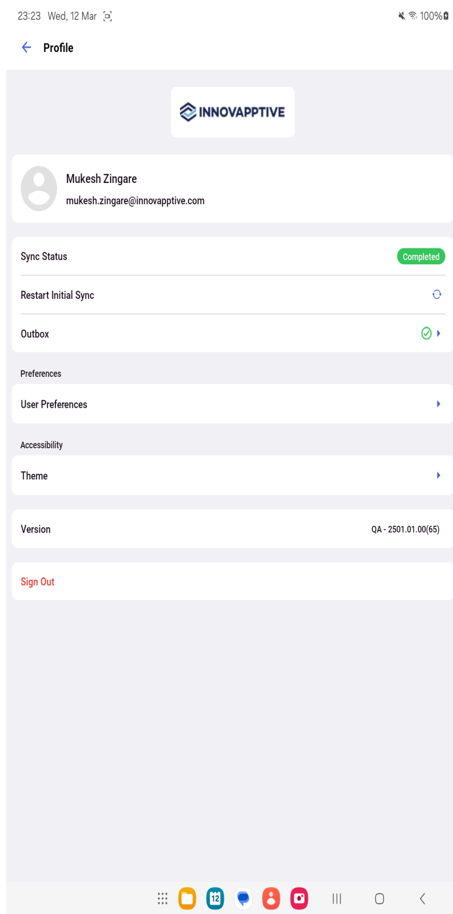
To access and view the User Profile screen:

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

   The User Profile screen is displayed with the following details:
   - Photo
   - Full Name
   - Email ID
   - Sync Status
   - Restart Initial Sync
   - Outbox

- User Preferences
- Theme
- Version
- Sign Out

Figure 12-1 User Profile Screen



12.2. Update User Preferences

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

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

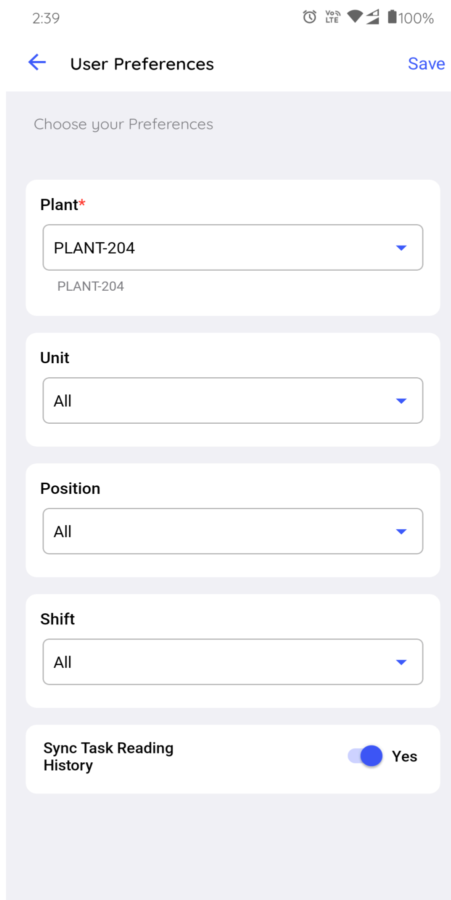
To select or change a plant:

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

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

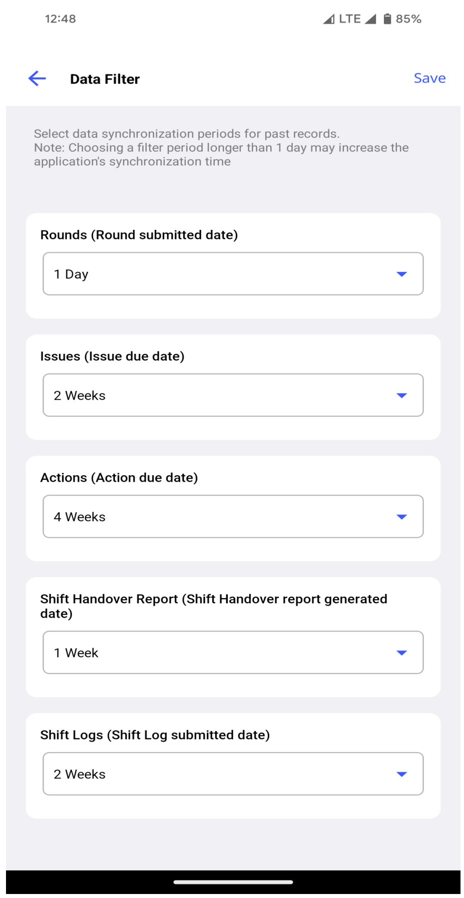
The shift field is automatically selected based on your device's current time.

Figure 12-2 Select Plant



In the Data Filter screen, you can,

Figure 12-3 Data Filter



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

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

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

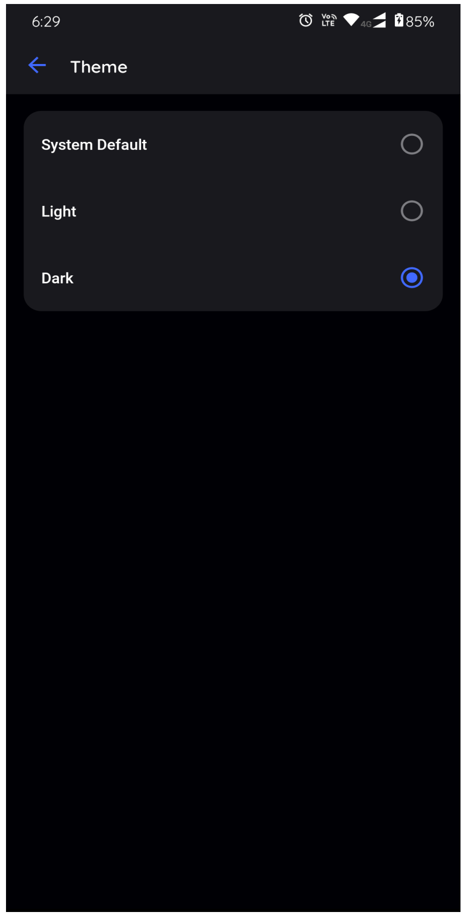
12.3. Switch Between Dark and Light Modes

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

To change the mode or theme:

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

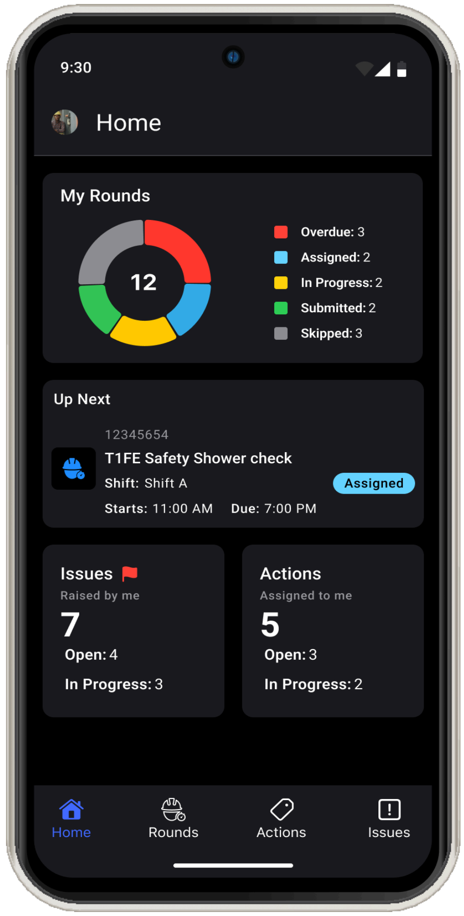
Figure 12-4 Select Theme



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

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

Figure 12-5 Dark Mode



12.4. Change the Language

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

To change the language:

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

   The application is displayed in the selected language.