mRounds User Guide for Supervisors

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.

- New Features and Enhancements in Release 2308 *(on page 43)*
- New Features and Enhancements in Release 2306 *(on page 44)*
- New Features and Enhancements in Release 2305 *(on page 47)*
- New Features and Enhancements in Release 2304 *(on page 47)*

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. For more information, see Import Round Plans from Template *(on page 124)*.
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. For more information, see Create an Ad-Hoc Round *(on page 127)*.
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. For more information, see Create a Round Plan and Publish *(on page 110)*.
Bulk Upload / Export via Excel

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

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. For more information, see Create a Round Plan and Publish *(on page 110)*.
Post Only the Differences 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. For more information, see Number *(on page 88)*.
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. For more information, see Monitor Anomalies Using the Exceptions Dashboard *(on page 75)*.
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. For more information, see Share Dashboard Data as PDF Reports *(on page 80)* .

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

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. For more information, see Create Custom Widgets *(on page 68)*.
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. For more information, see Number *(on page 88)*.
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. For more information, see View Round Plans and Submitted Rounds *(on page 144)* .
Convert Existing Rounds into Digital Round Plans

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

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. For more information, see Create Round Plan Template using AI *(on page 184)* .

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. For more information, see Operator Productivity Dashboard *(on page 77)*.
Deeper Visibility into How Users Engage with Inspection Workflows Track how operators and supervisors interact with various inspection-related actions—such as filling forms, clicking action buttons, or submitting inspection reports. Build behavioral profiles and uncover friction points within inspection tasks to improve efficiency and adoption.
Review Inspection Submissions and Take Action—All in One View Supervisors can now interactively review submitted rounds within the system, without exporting data. This allows faster identification of incomplete inspections, missed scans, or abnormal readings—and enables corrective action right from the review screen. For more information, see Configure Round Plan Details *(on page 128)*.
Seamless Shift Transitions—Tailored to Each Role

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

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. For more information, see Create an Issue *(on page 149)*.
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. For more information, see Number *(on page 88)*.
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. For more information, see Configure an Issue *(on page 147)*.
Targeted Insights for Product-Specific Inspection Analysis

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

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. For more information, see Apply Filters to Refine Results *(on page 173)*.

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. For more information, see Generate and Handover Shift Handover Report *(on page 161)*.
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.
Shift Logs with Conditional Logic

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

You can now use Conditional Logic in your unit's Shift Log , which allows you to view and fill out Shift Logs that are specific to your assigned unit. This improvement helps keep things simple by showing only relevant information, making your logging experience more focused and avoiding confusion from other units.
Mobile Access to Configured Issue Templates Users can view and use plant-specific Issue Templates right from the mobile app . These templates come with pre-filled fields, helpful guidance, and default values to make it quicker and easier to create issues—keeping everything consistent and aligned with your plant's standards, even when you're offline. For more information, see Configure an Issue *(on page 147)*.
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. For more information, see Operator Productivity Dashboard *(on page 77)*.

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 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. For more information, see Create a Round Plan and Publish *(on page 110)*.

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

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. For more information, see Track Ongoing Issues *(on page 150)*.

New Features and Enhancements in Release 2501

Table 1-5 New Features and Enhancements in Release 2501

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

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

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

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

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

New Features and Enhancements in Release 2408

Table 1-6 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.

For more information, see Monitor in Real-Time and Share Reports *(on page 66)*.

Streamlined Issue Creation & Assignment in Web App

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

How it benefits:

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

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

Multi-Language Support for mRounds Mobile App

Operators can now View the mRounds Mobile Application in Their Preferred Language, tailored to their specific language and regional settings.

How it benefits:

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

Implemented Rapid Sync

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

How it benefits:

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

Improved Productivity with Seamless Task Navigation

With the new **Seamless Task Navigation** feature, operators can quickly move between tasks using "**Next**" and "**Previous**" buttons on the on-screen keyboard, eliminating the need for manual input.

How it benefits:

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

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

Create Real-Time Breakdown Alerts

With Real-Time Breakdown Alerts, you can immediately notify operators about any equipment breakdowns. This feature ensures operators are alerted instantly, allowing them to respond quickly and reduce downtime, keeping operations running smoothly and efficiently.

How it benefits:

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

SFTP Server Downtime Notifications

Stay ahead of potential disruptions with SFTP Server Downtime Notifications. This feature sends instant alerts when the SFTP server experiences downtime, enabling the super admin to take immediate action and restore operations without delay.

How it benefits:

- **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.

Instant Issue Notifications for Faster Response

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

How it benefits:

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

Enhanced Location Access for Precise Task Execution

With Location Access Enabled, devices can utilize location services to ensure operators perform tasks and rounds within the designated areas, improving accuracy and compliance.

How it benefits:

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

Plant-Specific Filters in Master Data, Reports and Dashboard

The Plant-Specific Filters feature allows operators to filter and view data, reports, and dashboards specific to individual plants within an organization.

How it benefits:

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

• **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. For more information, see About the Web Application Screens *(on page 56)*.
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.

New Features and Enhancements in Release 2404

Table 1-7 New Features and Enhancements in Release 2404

Execute Rounds even after their due time Execute round tasks even after their due time. This buffer time for a round helps operators execute rounds without them being marked overdue.
Self Assign Rounds from My Rounds This usability enhancement helps operators assign open rounds to self directly from the My Rounds screen.
View Previous Exceptions to Readings When a reading is taken, the operator can now view previous exceptions to readings along with exception messages that are taken during previous shifts. This helps operators identify hazardous conditions of the equipment.
View Multiple Lower and Upper Limits View multiple lower and upper limit range values and exceptions for numeric and slider responses while executing a round.
Create Issues / Actions at Unit Level Create issues and actions at Unit level. This helps operators assign issues to units without errors.
Track Round Execution Duration Identify the duration of round execution. This helps users to optimize future rounds.
Setup Workflow Approval Configure workflow approval for round plan submissions and publishing. With proper workflows, technicians with the right skills will be able to review alerts, warnings or cautions.

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

For more information, see Review and Approve Round Plans *(on page 129)*.
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. For more information, see Schedule Round Plans by Frequency *(on page 134)*.
Add Exceptions for Minimum and Maximum Values Add exceptions like Warning, Alert, Note, and so on for low and high range values while creating a round plan. This helps operators identify any hazardous condition of the equipment. For more information, see Number Range and Exceptions *(on page 91)*.
Copy Tasks across Multiple Assets Copy tasks in a round plan to multiple assets or locations with ease. This reduces repetitive work. For more information, see Create a Round Plan and Publish *(on page 110)*.
Filter Rounds at Unit Level • Filter rounds data based on their assigned units to control access of the users. • Users with multiple units can select and view data for one unit at a time.
Add Multiple Lower and Upper Limits Configure multiple lower and upper limit range values and exceptions for numeric and slider responses while creating a round plan. For more information, see Number Range and Exceptions *(on page 91)*.
View Unit-Level Issues and Actions View issues and actions at Unit level to ensure right issues are raised on the right units.

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

Track Round Execution Duration Identify the duration of round execution to optimize future rounds accordingly. For more information, see View Round Plans and Plan Details *(on page 143)*.
Enhanced "Custom Picklist" Response Type The "Custom Picklist" response type now displays "Allow More than One Selection", when values exceed two options.
Confirm Shift Handover When you click the Shift Handover button, an alert message, "Do you really want to start handover?" appears. For more information, see Overview of Shift Handover Reports *(on page 159)*.

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. For more information, see Create and Manage Round Templates *(on page 180)*.
Import Round Plans and Tasks Data Eliminate manual data recreation by exporting and importing Round Plans and Tasks data from one environment to another.

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

For more information, see Import Round Plans from Template *(on page 124)*.
Round Plans are automatically updated with templates that are modified When a template is updated, associated Round Plans are automatically updated. This helps maintain consistency and accuracy across all plans. For more information, see Edit Round Templates *(on page 185)*.
Shift Handover Report Enhancements • Shift Handover Module is now governed by Access control. • Users can control the functionality of units within the application. • Generate Plant Level Shift Handover Reports (SHRs) when the SHR flag is enabled and the Unit flag is disabled. For more information, see Manage Shift Handover Authorization *(on page 169)*.
Bulk Upload Round Plans from Excel Add multiple Round Plans with tasks from an Excel sheet. mRounds Round Plans screen displays success / failure status along with Round Plans total count. For more information, see Create a Round Plan and Publish *(on page 110)*.
Customize Shift Log Template Create, edit, and modify a customizable Shift Log Template for operators to easily record tasks, issues, and notes during their shifts. This ensures clear communication. For more information, see Create Shift Log Template *(on page 166)*.
Auto Sort Round Plans by latest When a round plan is published, the plan automatically sorts to the top of the list. You can immediately view the published plan. For more information, see Create a Round Plan and Publish *(on page 110)*.

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

Automatic Asset Name Updates in Round Plans When an asset name is changed after the creation of a round plan, the updated name is automatically updated in the round plan. For more information, see Create a Round Plan and Publish *(on page 110)*.
Auto-Populate "Reported By" Field The "Reported By" field in the SAP Notification screen auto-populates based on the user's login credentials.

New Features and Enhancements in Release 2402

Table 1-9 New Features and Enhancements in Release 2402

SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication. For more information, see Log in with SAP IDP *(on page 55)*.
Add Audio, Video and Documents to Task Responses Add attachments like audio, video and documents to your Task responses and access them as links in the generated PDF for better communication and collaboration.
View and Download Attachments for Rounds View and download attachments like audio, video and documents by clicking the links in the generated round details PDF to validate the evidence effectively. For more information, see View Round Plans and Plan Details *(on page 143)*.
Master Data Management Integration

Table 1-9 New Features and Enhancements in Release 2402 (continued)

Create and update master data directly within the Connected Worker's platform by utilizing files stored in an FTP server.

New Features and Enhancements in Release 2401

Table 1-10 New Features and Enhancements in Release 2401

Use Formulas for Calculations During Task Execution Execute tasks accurately using formulas. These formulas are configured using the web application and give accurate calculations and help operators enter accurate data.
Assign Actions to User Groups Create and assign actions to user groups in mobile application. This allows any operator in those groups to pick up and execute those actions.
Add required notes in Shift Handover Reports Add and include required notes in the Shift Handover Report.
Sync Last N Task Reading in Online and Offline mode Sync "Last N Task Reading" in online mode and download them offline during initial sync by enabling the toggle button accessible in the User Preference screen.
Acknowledge End User License Agreement Read and acknowledge End User License Agreement when logged into the application for the first time. For more information, see Standard Login *(on page 54)*.
Configure Mathematical Formulas for Fields Configure mathematical formulas for fields. These formulas help operators get accurate calculations and enter accurate data.

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

For more information, see Number *(on page 88)*.
Export Historical Data to FTP Export Historical Data from the application in the .CSV format to an FTP server. This helps share the data easily with employees who need it without providing access to the application. For more information, see the mRounds Integration Guide.
Deactivate Unnecessary Master Data Deactivate Assets and Locations that are no longer needed.
Create and Assign Actions to User Groups Create and assign actions to user groups in the web application. This allows any operator in those groups to pick up and execute those action. For more information, see Create an Action *(on page 153)*.
SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication. For more information, see Log in with SAP IDP *(on page 55)*.
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.
View Character Limits for Fields View character limits for each field, enter the right data, and maintain data integrity.
Justify Overdue Rounds When a round goes beyond the due date, specify reasons for the overdue in the comment.
Record Task-Level Date & Timestamp Move between tasks during round execution by marking / recording the date and time for each task individually.
Receive Instant Email Alerts • Receive instant emails when an issue or action is created, updated, resolved or closed. For more information, see Create and Manage Issues *(on page 147)*.
Specify Length of data to be entered in the fields Set specific field lengths while planning rounds. This helps prevent incorrect or incomplete data entry during round execution. For more information, see Understanding Response Types Used for Creating Round Tasks *(on page 82)*.
Download User List for a Plant

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

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. For more information, see Create an Ad-Hoc Round *(on page 127)*.

New Features and Enhancements in Release 2311

Table 1-12 New Features and Enhancements in Release 2311

Acknowledge Previous Shift Handover Reports Review and acknowledge the previous shift's handover report before starting new rounds. This helps execute rounds with increased efficiency.
Add Documents to Task Responses Add attachments like documents to your Task responses and access them as links in the generated PDF for better communication and collaboration.
Add Real-Time Shift Log Entry Add shift logs with notes and observations to the Shift Handover Report during your shift.
Advanced User Access Control Select position and unit while logging in. This syncs the rounds by position and unit and eliminates unnecessary data.
Generate and Approve Shift Handover Report

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

• 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. For more information, see Overview of Shift Handover Reports *(on page 159)*.
View and Download Attachments for Rounds View and download attachments like videos and documents by clicking the links in the generated round details PDF and validate the evidence. For more information, see View Round Plans and Plan Details *(on page 143)*.
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

Table 1-13 New Features and Enhancements in Release 2309 SP04 (continued)

Analyze and track trends easily from past readings by viewing reading history with a single tap.

New Features and Enhancements in Release 2309 SP03

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

View historical data of Issues of an Asset and a Location • Receive pop-up message while creating an issue for assets / locations that shows existing issues and lets you create new ones. • View the issue history or previously raised issues to avoid creating duplicates. • Create an issue at any time, regardless of previous issues raised. • View all past issues, even after new ones are raised.
View historical data of Notifications of an Asset and a Location • Receive pop-up message while creating an issue for assets / locations that shows existing issues and lets you create new ones. • View the issue history or previously raised notifications to avoid creating duplicates. • Create a notification at any time, regardless of previous notifications raised. • View all past notifications, even after new ones are raised. For more information, see Create ERP Notification for an Asset *(on page 157)*.
Access Plant-Specific Rounds Assign plants to users and ensure secure control over the rounds. For more information, see About the Web Application Screens *(on page 56)*.
Create Master Data with Unique ID and avoid duplication

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

• Create master data such as plants, assets, and locations with a unique id and avoid duplication. • Manually enter ids when copying to prevent duplicates in assets, locations, and plants. • Receive error messages for duplicate IDs and records while bulk uploading master data.

New Features and Enhancements in Release 2309 SP02

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

Auto-Capture Geolocation during Task Execution During task execution in offline mode, auto-capture geolocation of the asset.
Monitor team activities Generate a team rounds / inspections report that provides an overview of all completed activities, identifies areas for improvement, and ensures task completion. For more information, see Monitor in Real-Time and Share Reports *(on page 66)*.
View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency. For more information, see Monitor in Real-Time and Share Reports *(on page 66)*.
Access detailed reports of supervisors' actions on the issues raised Administrators can access detailed reports of actions taken by supervisors on issues that are raised by operators. For more information, see Monitor in Real-Time and Share Reports *(on page 66)*.
Get a report for Overdue tasks

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

Get a detailed report on overdue tasks. These reports help supervisors have a glance at overdue tasks and take appropriate action. For more information, see Monitor in Real-Time and Share Reports *(on page 66)*.
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.
Enable / Disable application passcode screen Disable application passcode screen when user does not want it and enable network login ID and password to login.
Access detailed reports of supervisors' actions on the issues that are raised Administrators can access detailed reports of actions taken by Supervisors on the *Issues* that are raised by operators.
View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency.
Configure Widgets on the Dashboard screen Configure the dashboard widgets that you need and improve monitoring tasks.

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

For more information, see Create Custom Widgets *(on page 68)*.
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. For more information, see Create Custom Widgets *(on page 68)*.
Monitor, Improve, and Track Effectively with Comprehensive Rounds Report Stay on top of team performance with comprehensive rounds reports. Supervisors can use these reports to monitor activities, pinpoint areas of improvement, and track tasks completion. For more information, see Monitor in Real-Time and Share Reports *(on page 66)*.

New Features and Enhancements in Release 2309

Table 1-17 New Features and Enhancements in Release 2309

Sync round plans data for a plant Select a specific plant to sync data and filter out non-relevant data.
Access only user group specific rounds

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

Access user group specific rounds for a tailored user experience.
Detect anomalies early by checking historical data With access to historical data and trends for an asset, detect anomalies early and enforce appropriate maintenance tasks.
Capture detailed rounds data with additional data provided by the rounds planner View additional notes, labels, values in the Task Details screen that are provided by the rounds planner and capture detailed and valuable information.
Attach videos and documents as proofs for tasks Attach videos and documents as responses and improve comprehension of the task data, with clickable links in generated PDF reports for enhanced usability and documentation.
Toggle themes for personalized experience Switch between Dark Mode and Light Mode themes depending on your preferences.
Introduced User Groups • Create a user group and add users to the group. • Modify the user list in the user group. • Remove a user from the user group. • Copy an existing user group to quickly create new user groups. • Delete a user group and assign rounds to another group.
Schedule Rounds based on task frequency for efficient maintenance Schedule Round Plans based on individual task frequencies. Form a comprehensive Master Plan for proactive asset maintenance and ensure precise, efficient equipment maintenance. For more information, see Schedule Rounds at Task Level *(on page 139)*.

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

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. For more information, see Schedule Round Plans *(on page 133)*.
Enable unlimited historical data capture for Number response type Enable / configure the Number response type to store up to 20 historical readings that help detect anomalies early using the data trends. For more information, see Number *(on page 88)*.
Add additional details for conditional logic Add mandate responses, define a number range, and specify unit of measurement options for tasks in conditional logic. For more information, see Conditional Logic *(on page 107)*.
Add additional notes, labels, values in the Task Details screen Add additional notes, labels, values in the Tasks Details screen to provide additional information to technicians and assist them to function more efficiently and effectively. For more information, see Create a Round Plan and Publish *(on page 110)*.

New Features and Enhancements in Release 2308

Table 1-18 New Features and Enhancements in Release 2308

Get Timely Reminders about Every Issue, Action and Round through notifications Receive push notifications from the application to ensure you do not miss important reminders such as overdue rounds, issues, or actions.
Work on daily Rounds effortlessly with access to Additional Notes and Attachments Access any notes and manuals associated with rounds even in offline mode to execute the rounds according to the Standard Operating Procedures to enhance efficiency and productivity.
Skip Rounds with a Reason Skip the round with an appropriate reason when the round is no longer required.
Reduced cognitive load with well-structured rounds categorization View rounds grouped by start/due date & time in the My Rounds tab to quickly choose shift tasks and to help you identify and prioritize tasks.
Explore Dashboard with Interactive Graphs and Get 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.
Section-wise task counts for enhanced progress tracking

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

View the count of tasks on individual sections in a page for each round to clearly understand the task distribution and progress within the asset in the mobile application.
Switch Users Seamlessly from the lock screen You can handover your device to another user when the shift ends so that the other user can use the same device using their credentials.
Real-Time adaptation with the Skipped status in Rounds You can view the Skipped status, which indicates that an entire round is skipped with a reason. For more information, see About the Web Application Screens *(on page 56)*.
Add Additional Notes and Attachments to work on rounds effortlessly Add additional notes, safety instructions, and manuals as PDFs or images in the Round Plan Details screen to provide additional information to function more efficiently and effectively. For more information, see Create a Round Plan and Publish *(on page 110)*.

New Features and Enhancements in Release 2306

Table 1-19 New Features and Enhancements in Release 2306

Asset/Locations Management and Skip Functionality • View a list of assigned Assets/Locations for rounds. • Skip Asset/Location maintenance checks and provide a reason. • Undo skip for Assets/Location that are marked as skipped from the Route list. • View the count of skipped tasks in the Asset summary screen.
Introduced Dashboard

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

• Dynamic pie chart displays rounds that are due today with Assigned, In-Progress, and Submitted statuses. • Click Assigned and In Progress legends to view the My Rounds screen. • Click cards that display the count of Issues and Actions assigned to the operator to facilitate navigation to the respective screens. • Add Issues and actions from Open Issues/Actions from the dashboard.
View numeric historical data • View the history of numeric fields as a line chart for Number and Slider response types. • View the question name, operators who took the last 5 readings, and dates of the readings.
Enhanced PDF Preview Setup • Highlighted important fields such as Description, Asset, Location, and Priority of Issues & Actions. • Enriched PDF Preview with Photo & PDF attachments alongside textual content. • Incorporate visual cues for skipped Tasks, Assets, Locations and barcodes with reason codes. For more information, see Configure Round Plan Details PDF *(on page 128)*.
Overdue status in Rounds • Overdue status indicates that a round has not been submitted before the due date. • The application hides Overdue and Submitted Rounds one day after their due date.
Enhanced Round Plan Details • Add additional fields, labels with up to 25 and values with up to 40 characters, at the Round Plan Header screen to provide specific information based on the situation. • Flexibility to update or delete the added field labels and values at any time, even after scheduling Round Plans. • Set labels and values as read-only to ensure consistency and prevent unintended modifications.

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

Enhanced Number Response Type Enter decimals and negative values as responses to tasks that have a number response type.
Scan assets from Assets/Locations Route screen • Scan Asset QR/Bar-codes for the list of Rounds for an asset. • Select the Round to access the asset form and enter task values. • Streamlined navigation between asset lists and rounds through QR/Bar-code Scan.
View Start and Due Date/Time and start round • View Round details with Shift, Start date, Due Date, and Time slot in the Header. • Start rounds only after the designated Start Date/Time. • Overdue rounds automatically disappear from the mobile app after 24 hours. • Generate an Ad-hoc round with a 24-hour validity period.
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. For more information, see Schedule Round Plans *(on page 133)*.
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.

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

View Count of Questions on each Section • View questions count on individual sections for each inspection in the mobile application. • Dynamic questions count adjustments for condition logics like Ask/Hide tasks.
Configure Numeric Response Type Enable the "History" checkbox to view the last 5 readings of the Number and Slider response types in the mobile app. For more information, see Create a Round Plan and Publish *(on page 110)*.
Enhanced PDF Preview Setup Download PDFs of Overdue Rounds if they were earlier in the In Progress state.
Productivity Enhancements View a list of Skipped Assets/Locations assigned for the round.

New Features and Enhancements in Release 2305

Table 1-20 New Features and Enhancements in Release 2305

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

New Features and Enhancements in Release 2304

Table 1-21 New Features and Enhancements in Release 2304

View, Assign, and Execute Rounds

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.
Create, View, Assign, and Close Issues • Create issues for the observed anomalies during rounds execution. • Determine Priority through Risk Based Matrix. • View the list of issues in Open Issues and self assign if needed. • View created and assigned actions in My Issues. • Engage in live conversations with assigned Users. • Create a Notification for an asset and sync it with backend ERP systems instantly.
Create, View, Assign, and Close Actions • Create actions to follow-up on issues. • View the list of actions in Open Actions. • Self-Assign actions from Open Actions. • View created and assigned actions in My Actions. • Work on the assigned actions and close them. • Start live conversation with assigned Users. • Create a Notification for an asset and sync it with backend ERP systems instantly.
Productivity Enhancements • View the maintenance route or assets and navigate quickly through asset locations. • View Asset Hierarchy to locate the asset. • Track task progress through the progress bar on the top. • Add notes, attachments, and media for additional information that helps execute rounds efficiently.

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

Access the application in offline mode • Automatically download data from servers onto the devices on login. • Access the data in the offline mode. • View, Assign, and Execute Rounds. • Create, View, Assign, and Close Issues. • Create, View, Assign, and Close Actions. • Automatically download updates and syncs changes to the server when the internet connection is available.
Create, View, Edit, and Publish Round Plans • Create a round plan with multiple pages, sections, and tasks and publish. • Preview the round plan in the mRounds mobile application. • Configure the PDF view of the submitted rounds with Header, Subject, Footer, and Body Content. • View list of created round plans, edit them if required, and view plan meta details. • Edit a round plan to meet new requirements. For more information, see Create a Round Plan and Publish *(on page 110)*.
Add Response Types and Conditional Logic to Questions Read Only Field, Text answer, Long Text Answer, Number, Number Range, Number with Unit of Measurement, Pop up message based on number range, Check box, Scan (with OCR), Date & Time, Date Range, Signature, Slider, Geo Location, Hyperlink, Instructions, Multiple Choice, Global Picklist, Conditional Logic response types can be added to tasks. For more information, see Create a Round Plan and Publish *(on page 110)*.
Schedule Round Plans • Schedule round plans by frequency, by data and assign them to operators. • View the list of scheduled and published round plans. • Modify scheduled round plans. • Select a round to view details like Operator, Status, Scheduled By, and so on.

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

For more information, see Schedule Round Plans by Frequency *(on page 134)*.
Track progress of Scheduled Rounds • View Open, To-Do, In-progress, and Submitted rounds. • Download PDF reports of in-progress and Submitted rounds. For more information, see View Submitted Rounds *(on page 144)*.
Archive, Restore or Delete Round Plans • Archive authored round plans which are no longer required. • Restore the round plan when required. • Permanently delete the round plans. For more information, see Archive, Restore, and Delete Round Plans *(on page 178)*.
Track progress of Open Issues and Actions • View charts of open issues and actions. • View list of Open issues and actions created by operators. • Create a Notification for an asset and sync it with backend ERP systems instantly. For more information, see Create and Manage Issues *(on page 147)*.
Search & Filter • Search & Filter round plans. • Search & Filter rounds. • Search & Filter Archived round plans. • Search, Filter, and view open issues and actions. For more information, see Locate Rounds, Issues, and Actions *(on page 172)*.
Productivity Enhancements

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

• Create a new round plan instantly by copying the existing one. • Create a route to a round plan for operators to quickly navigate from one asset to another. For more information, see Create a Round Plan and Publish *(on page 110)*.
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 Web Application

This section provides guidance on logging into the web application.

This section has the following topics:

2.1. Standard Login

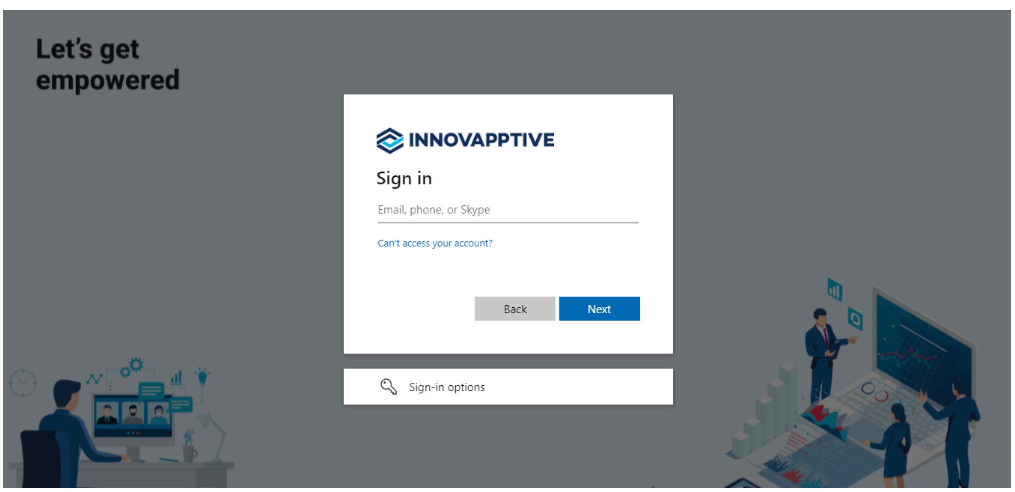
You can access the application through the URL and log in with your **User ID** and **Password**.

To log in to the Web Application:

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

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

Figure 2-1 Sign in Screen



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

   The application takes you to the home screen.

2.2. Log in with SAP IDP

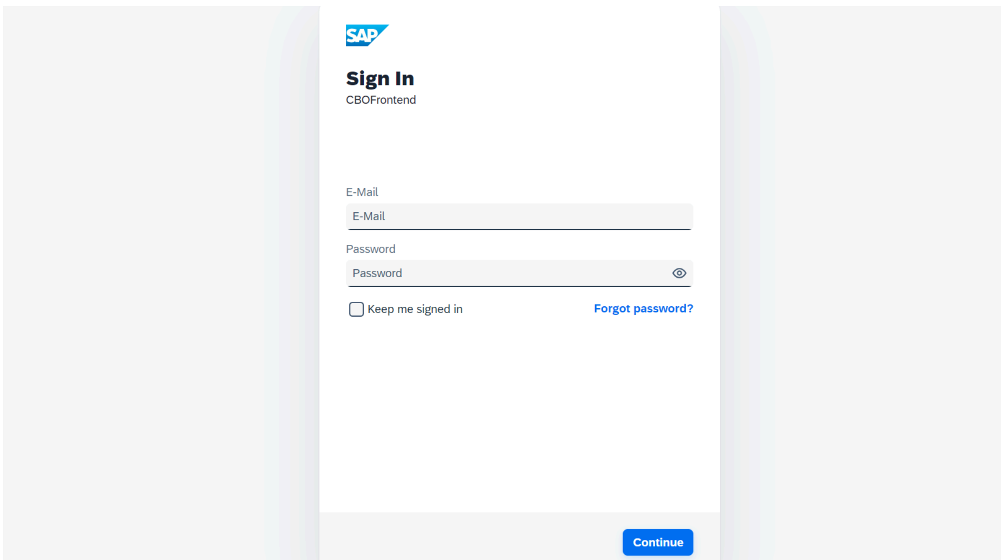
You can log into the web application using the SAP IDP.

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

To log in using SAP IDP:

1. Open the web application using the URL.

   Figure 2-2 Log in using SAP IDP

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

   The application displays the home screen.

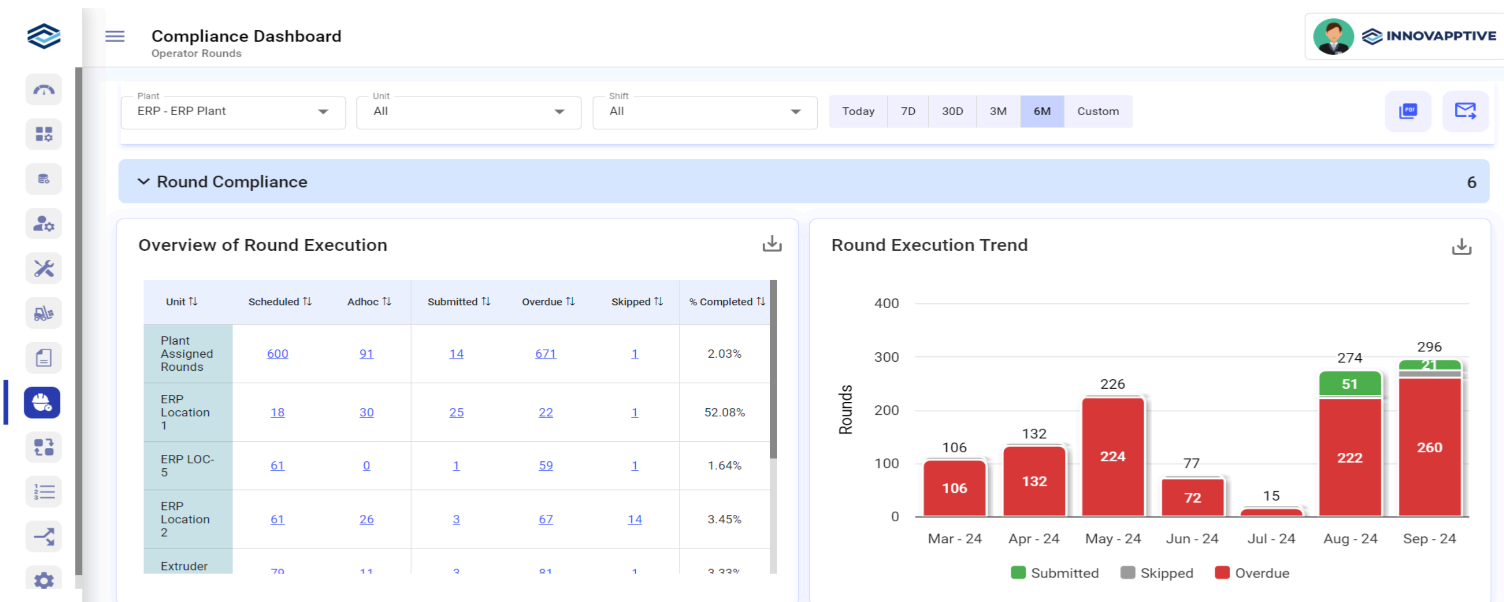
3. About the Web Application Screens

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

Compliance Dashboard

The **Compliance Dashboard** summarizes an operator's findings from their rounds, verifying adherence to operational procedures, schedules, and tasks, while confirming no significant issues are encountered. For more details, see Compliance Reports *(on page 74)*.

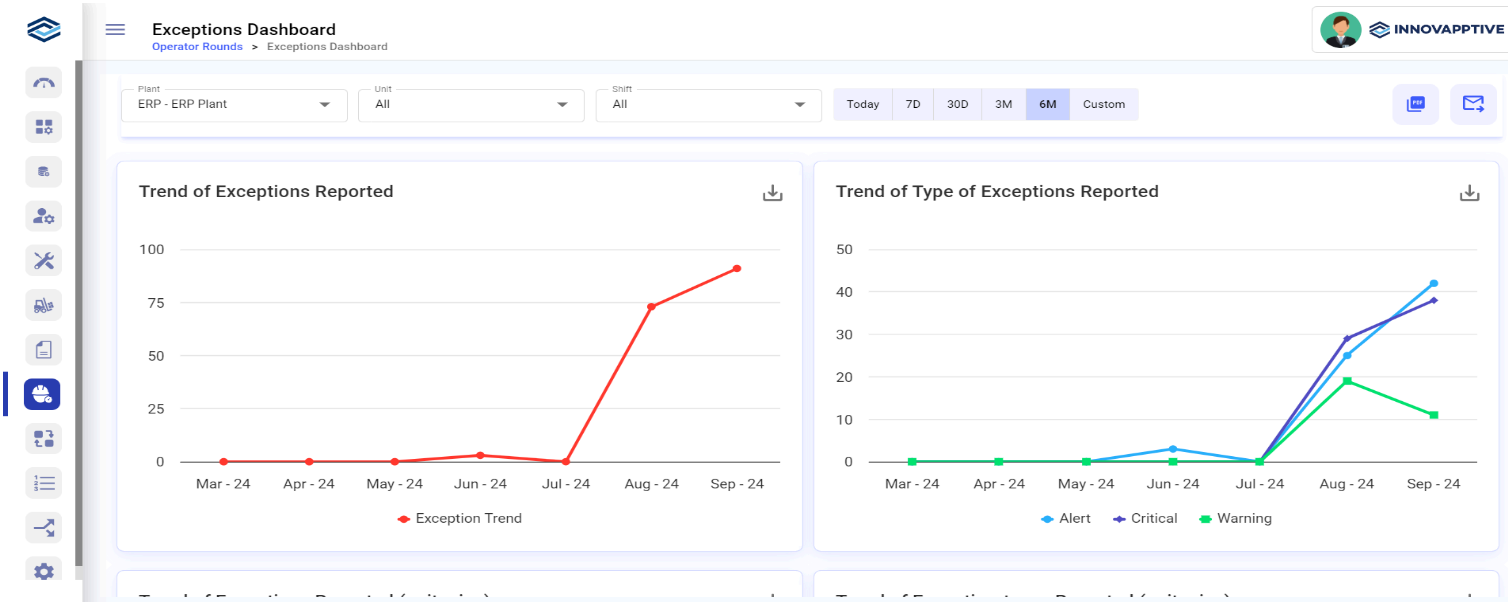
Figure 3-1 Compliance Dashboard



Exceptions Dashboard

The **Exceptions Dashboard** summarizes deviations from standard procedures or unexpected findings during rounds, highlighting anomalies like faulty equipment, safety hazards, or missing data. It helps identify and manage issues that could impact operational efficiency, safety, or compliance. For more details, see Monitor Anomalies Using the Exceptions Dashboard *(on page 75)*.

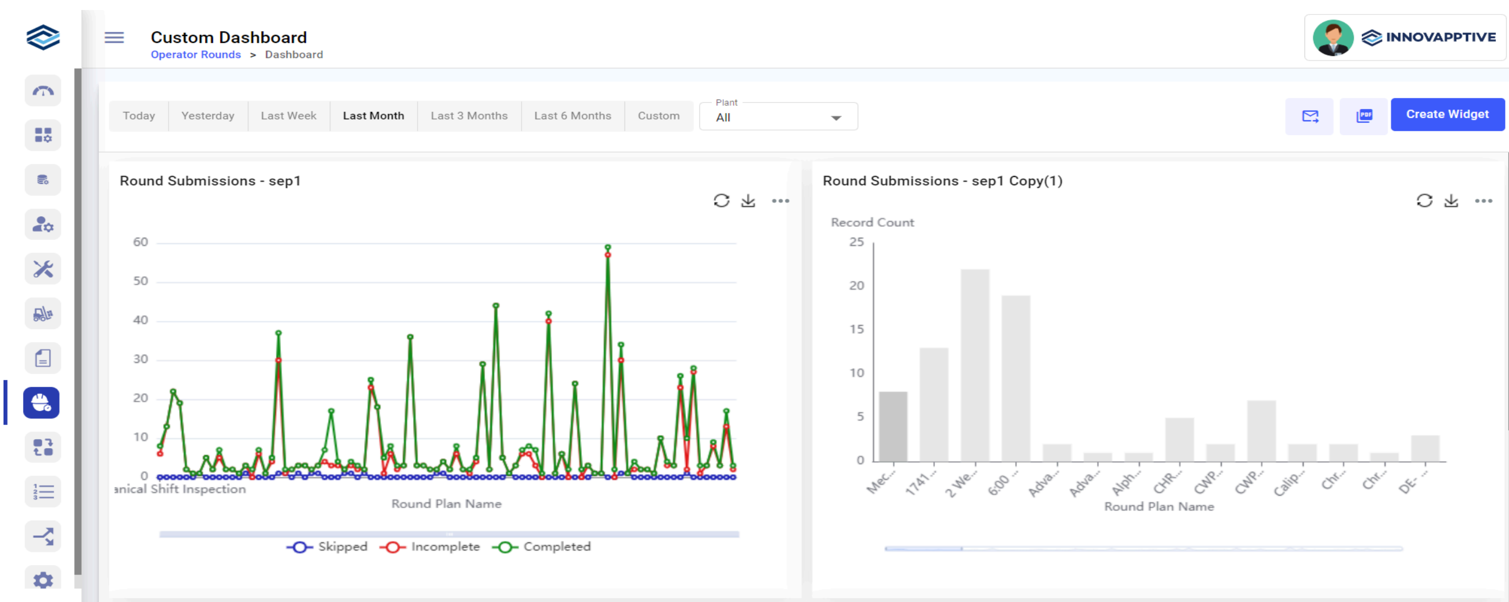
Figure 3-2 Exceptions Dashboard



Custom Dashboard

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

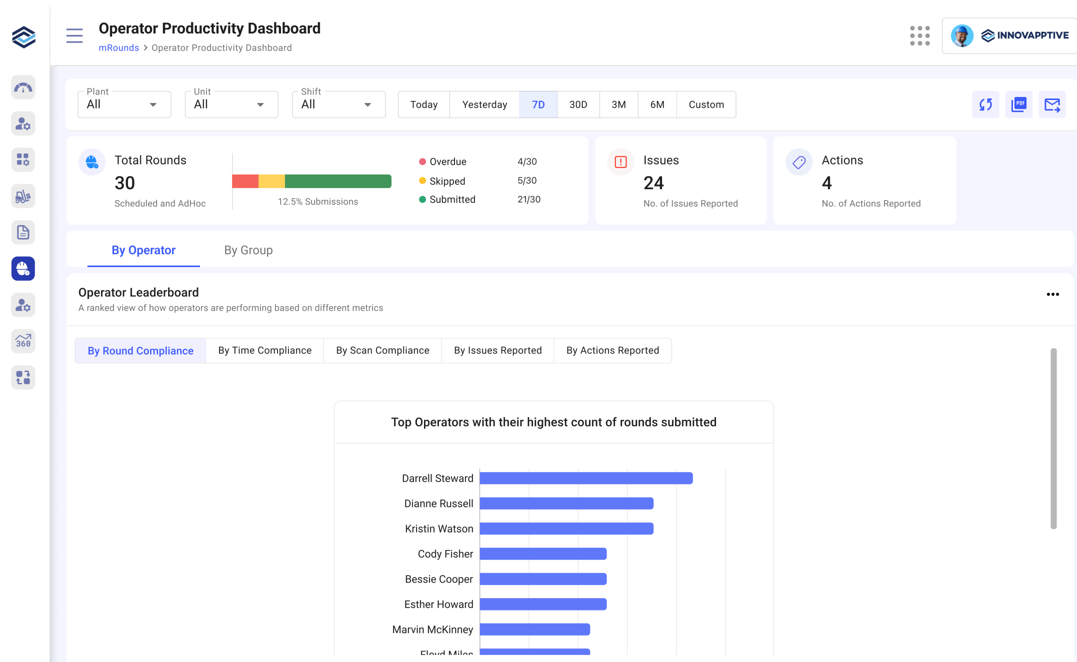
Figure 3-3 Custom Dashboard



Operator Productivity Dashboard

The **Operator Productivity Dashboard** gives supervisors a comprehensive view of operator and group performance reports — from round completion to issues raised. Built-in drill-down and time-based filters help uncover trends, gaps, or top performers.

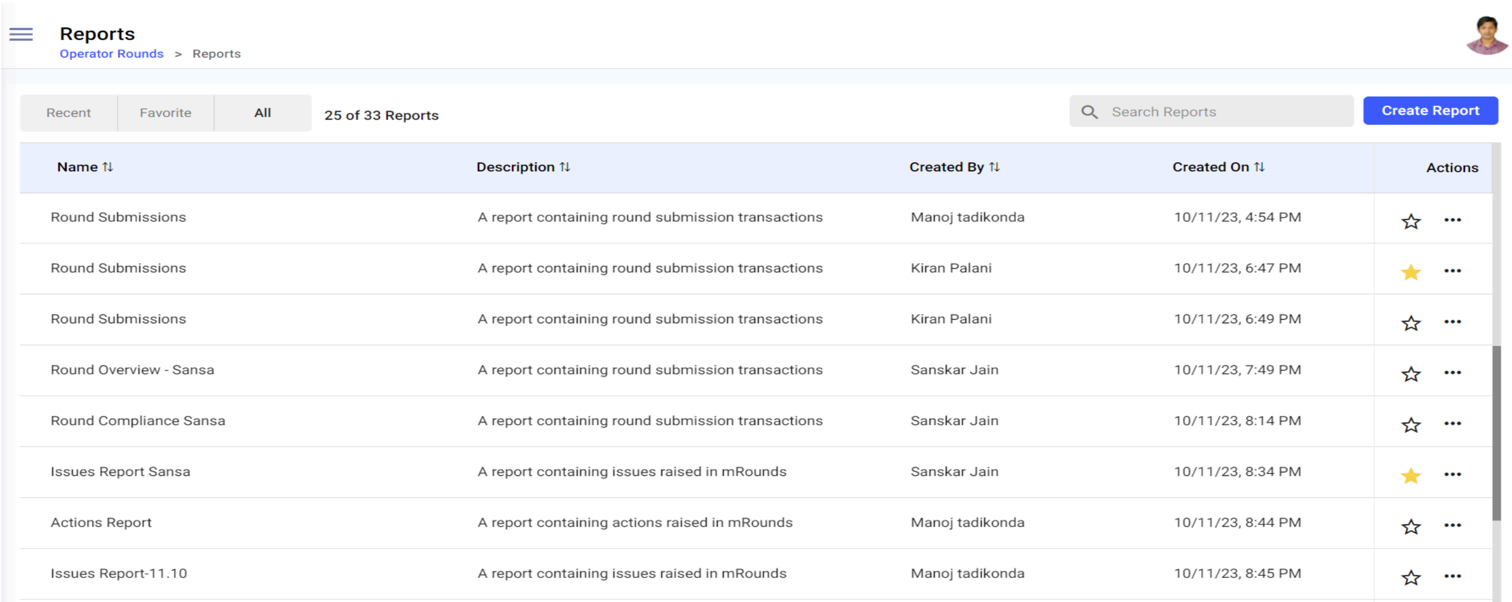
Figure 3-4 Operator Productivity Dashboard



Reports

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

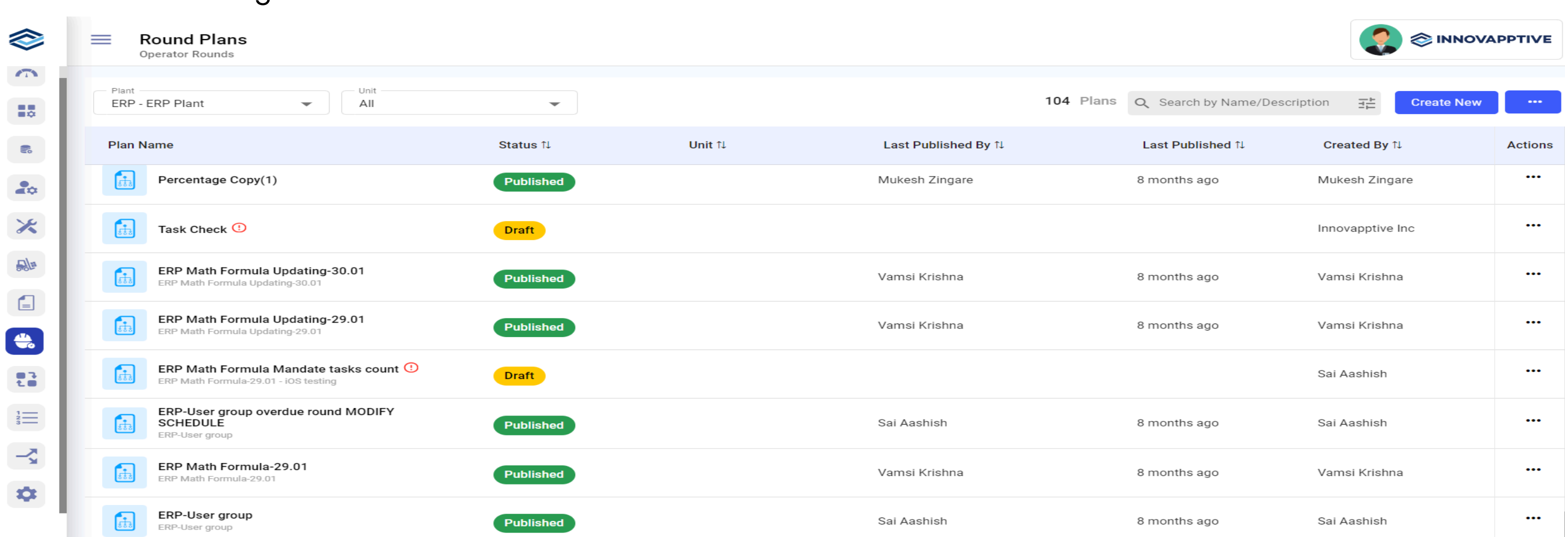
Figure 3-5 Reports



Round Plans

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

Figure 3-6 Round Plans Screen

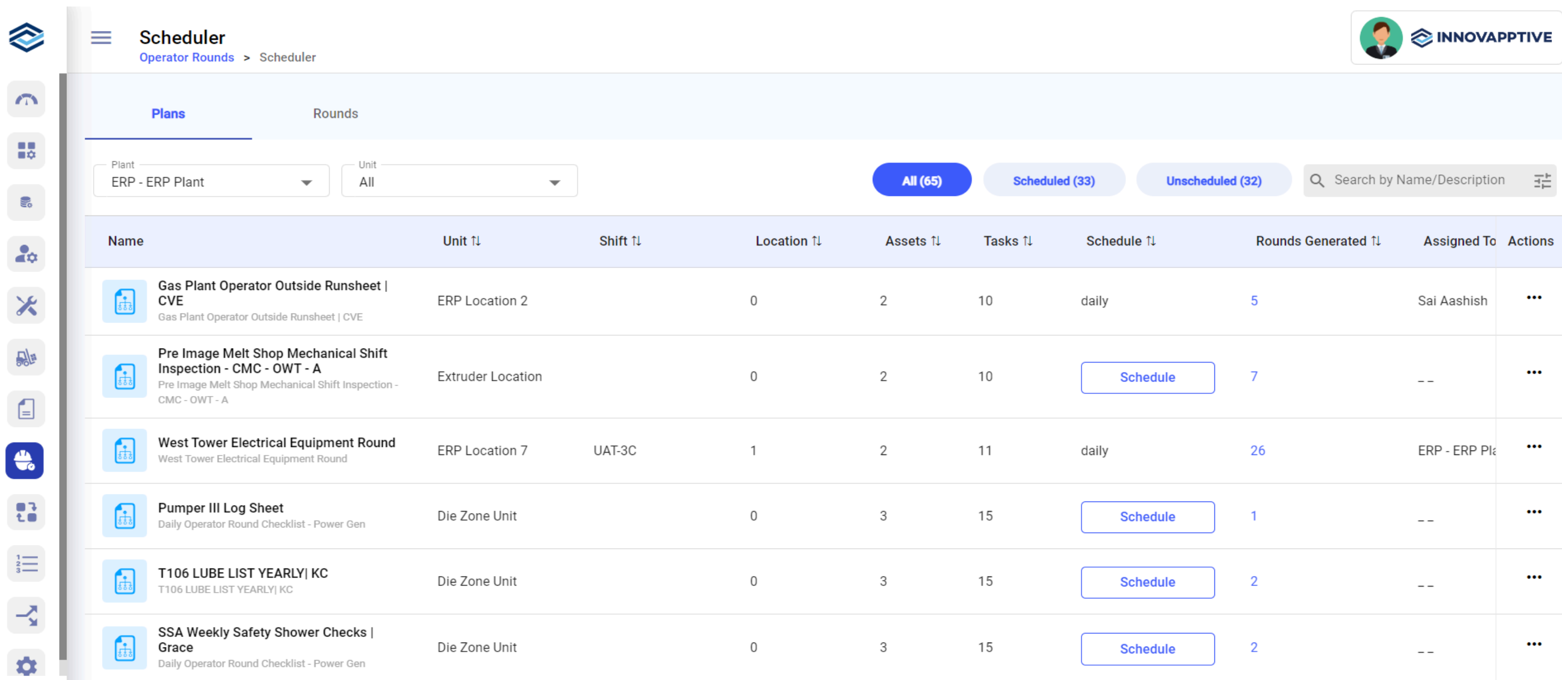


Scheduler

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

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

Figure 3-7 Scheduler Screen

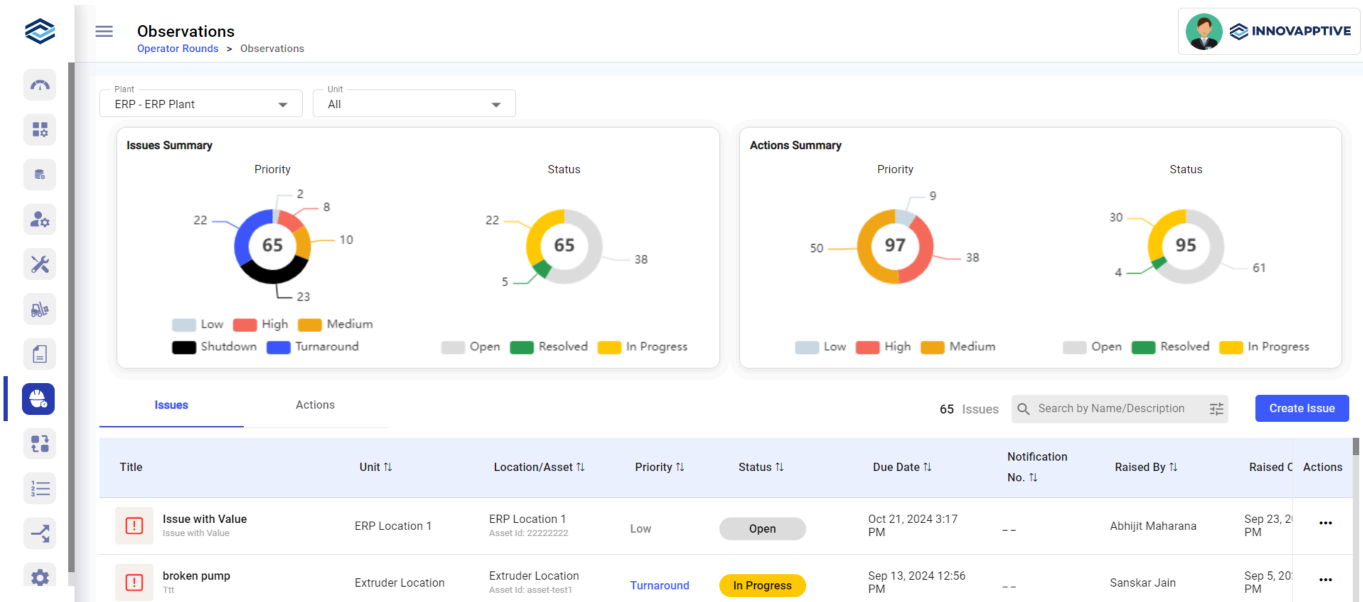


Observations

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

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

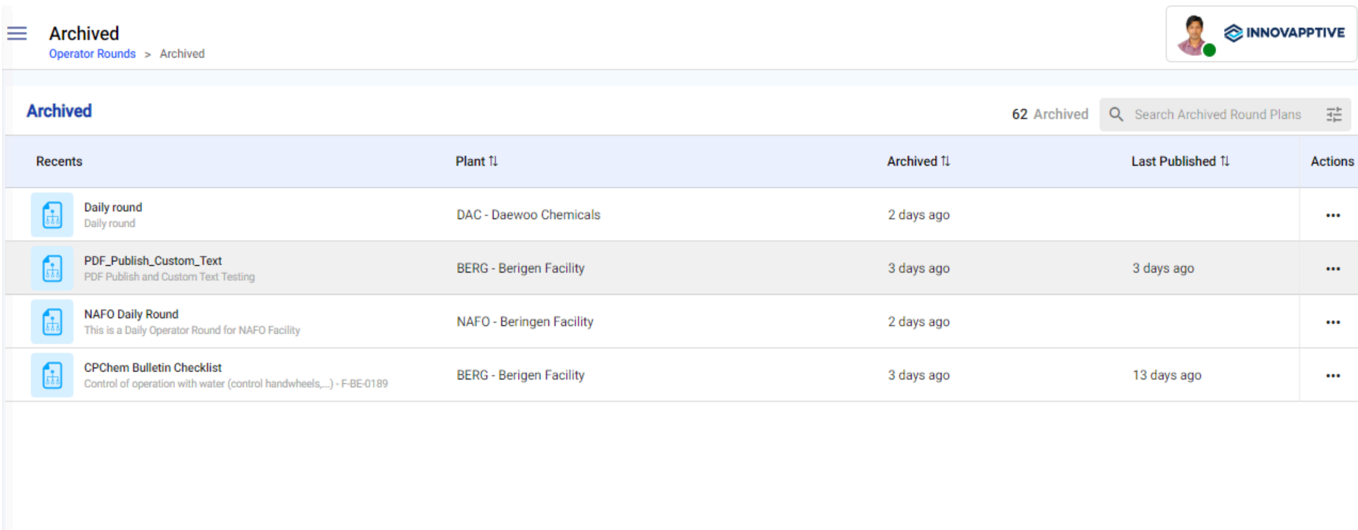
Figure 3-8 Observations Screen



Archived

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

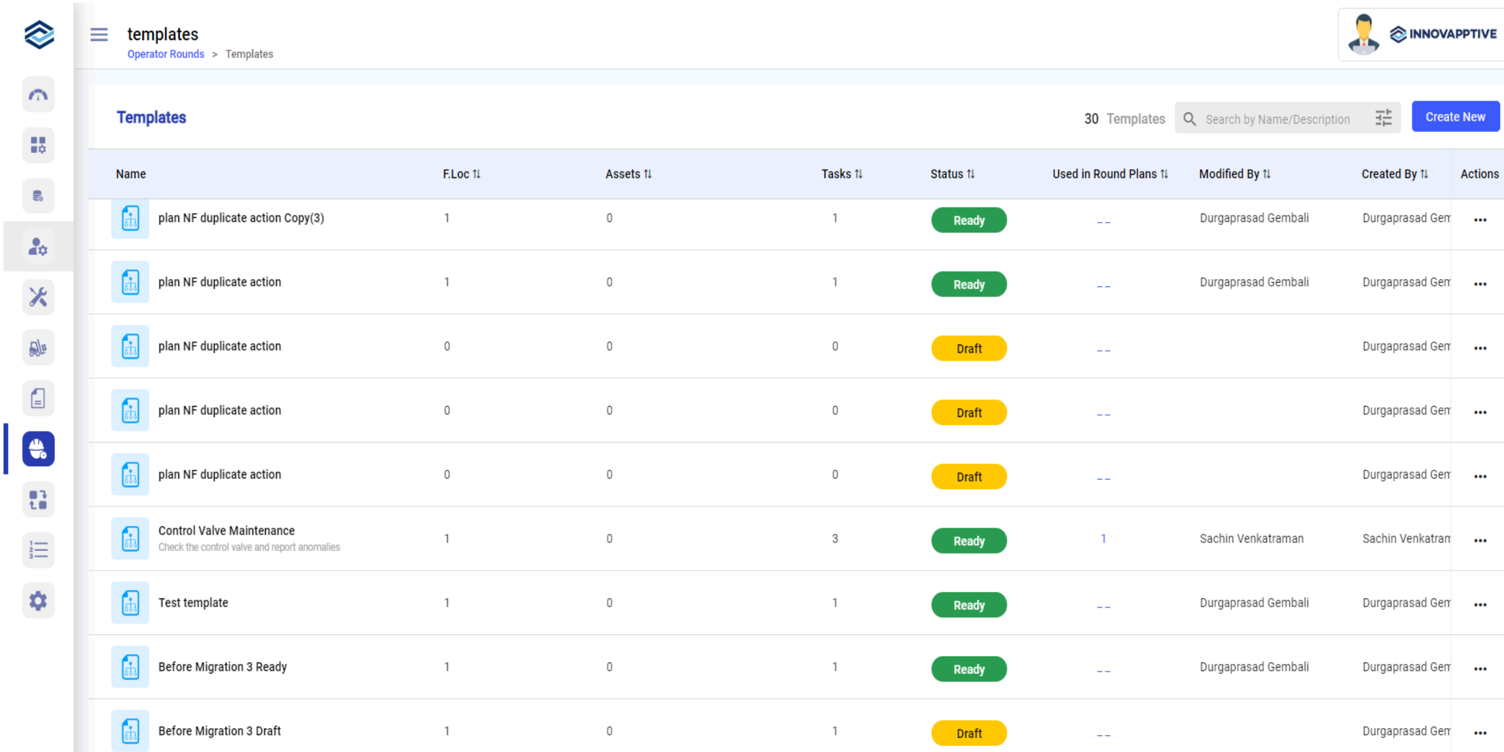
Figure 3-9 Archived Screen



Templates

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

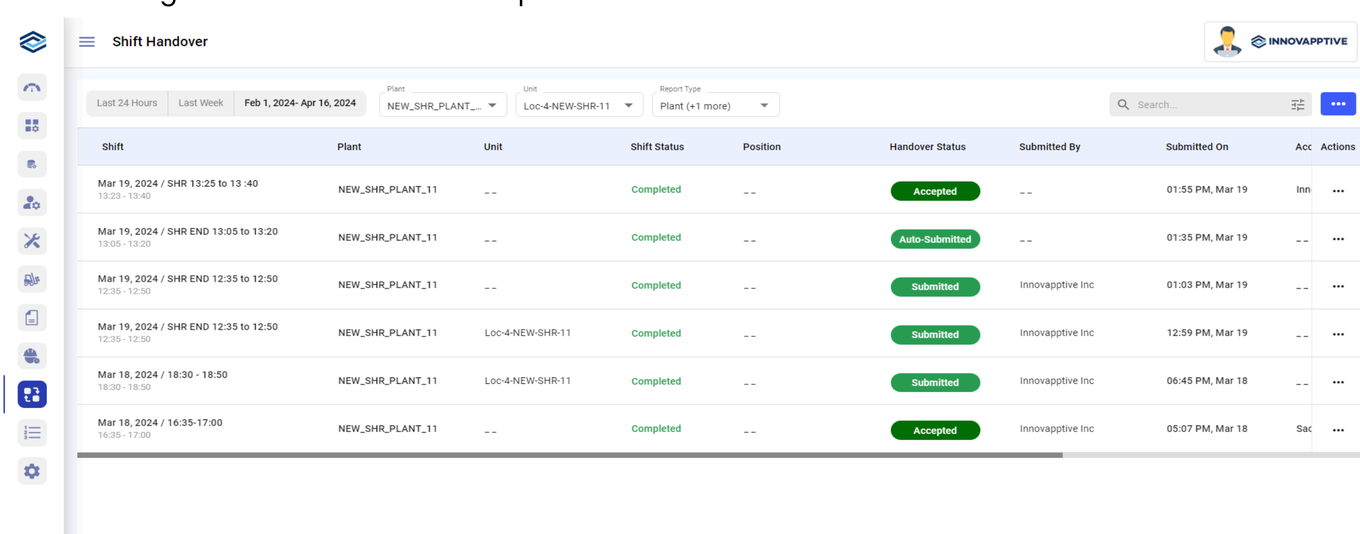
Figure 3-10 Templates Screen



Shift Handover

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

Figure 3-11 Shift Handover Reports Screen



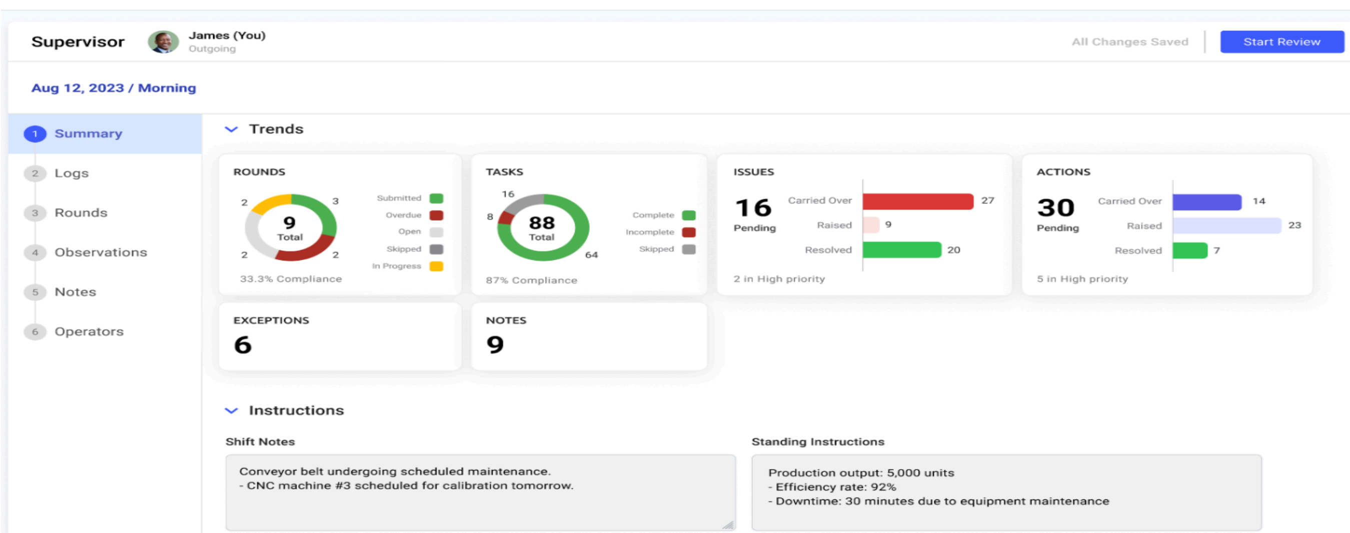
4. Review Accept Shift Handover Report

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

To review and accept the shift handover report:

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

Figure 4-1 SHR Review



4. In the **Logs** tab, review shift logs and click **Next** on top right.
5. In the **Rounds** tab, view the progress of rounds and click **Next**.
6. In the **Observations** tab, check unresolved exceptions, issues, and actions details and click **Next**.

7. In the **Notes** tab, review the notes added for the round during the shift and click **Next**.
8. In the **Operators** tab, view the operators along with the rounds submitted status and click **Accept** on top right.
9. In the **Confirm Acceptance** window, review the shift acceptance details and click **Accept**.

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

5. Monitor in Real-Time and Share Reports

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

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

Dashboard Features and Functionality

The Operator Rounds Dashboard is organized into several key functional areas that allow you to:

- Access your Custom Dashboard *(on page 67)* with personalized metrics and indicators.
- Generate detailed Compliance Reports *(on page 74)* to monitor adherence to standards.
- Review Monitor Anomalies Using the Exceptions Dashboard *(on page 75)* highlighting deviations from expected parameters.
- Analyze team performance through the Operator Productivity Dashboard *(on page 77)*.
- Share Dashboard Data as PDF Reports *(on page 80)* with stakeholders and management.
- Share Round Plans *(on page 80)* with team members for improved coordination.

Each section provides specific tools to help you monitor, analyze, and optimize your operational rounds process.

5.1. Custom Dashboard

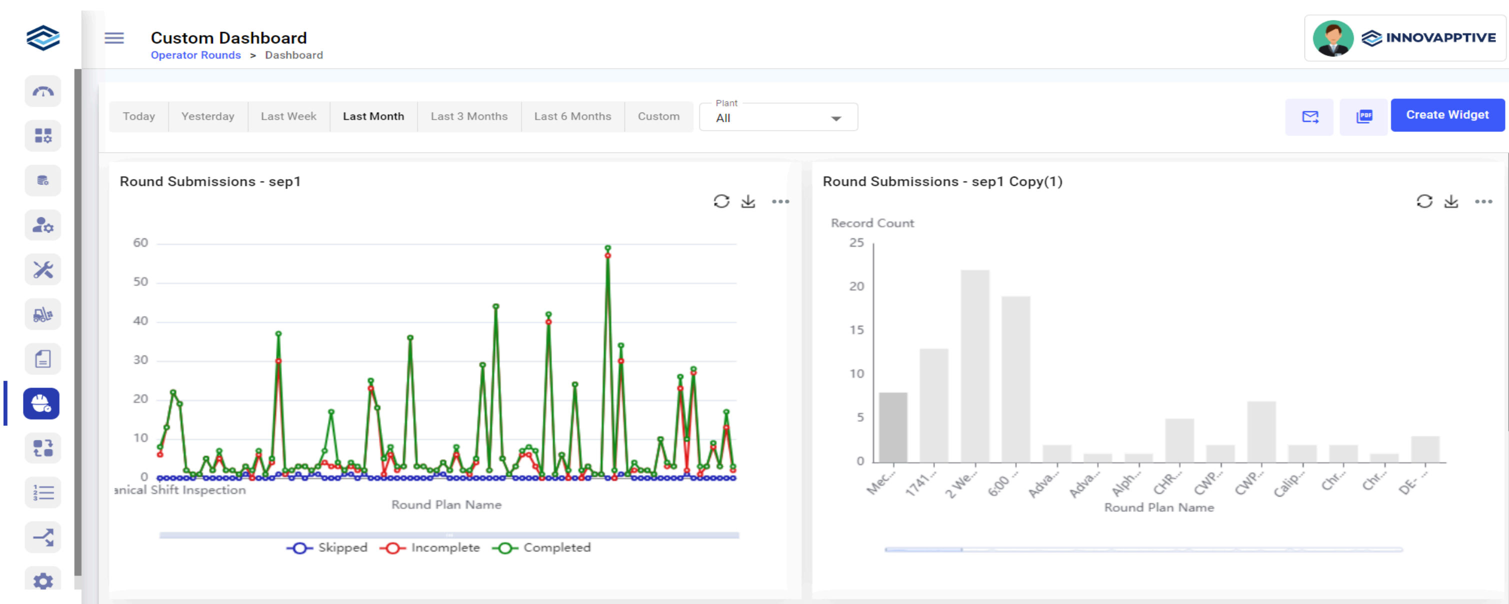
The **Custom Dashboard** provides a comprehensive overview of operator rounds and asset health, enabling real-time monitoring and analysis. Users can customize their experience by configuring widgets on the dashboard to display the most relevant data for their tasks. This flexibility allows for improved task monitoring and more efficient data analysis. Additionally, widgets can be easily downloaded or exported in PDF and Excel formats, or shared via email, streamlining collaboration and reporting. For more information, see Create Custom Widgets *(on page 68)*.

To view the Custom Dashboard:

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

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

Figure 5-1 Custom Dashboard



In this screen, you can,

- Filter reports based on Today, Yesterday, Last Week, Last Month, Last 3 Months, Last 6 Months, Custom, Plant, or Shift.
- Click the Undo  or Redo  icons to undo or redo the actions that you have performed.
- Click **Create Widget** to create a widget. For more information, see Create Custom Widgets *(on page 68)*.

5.1.1. Create Custom Widgets

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

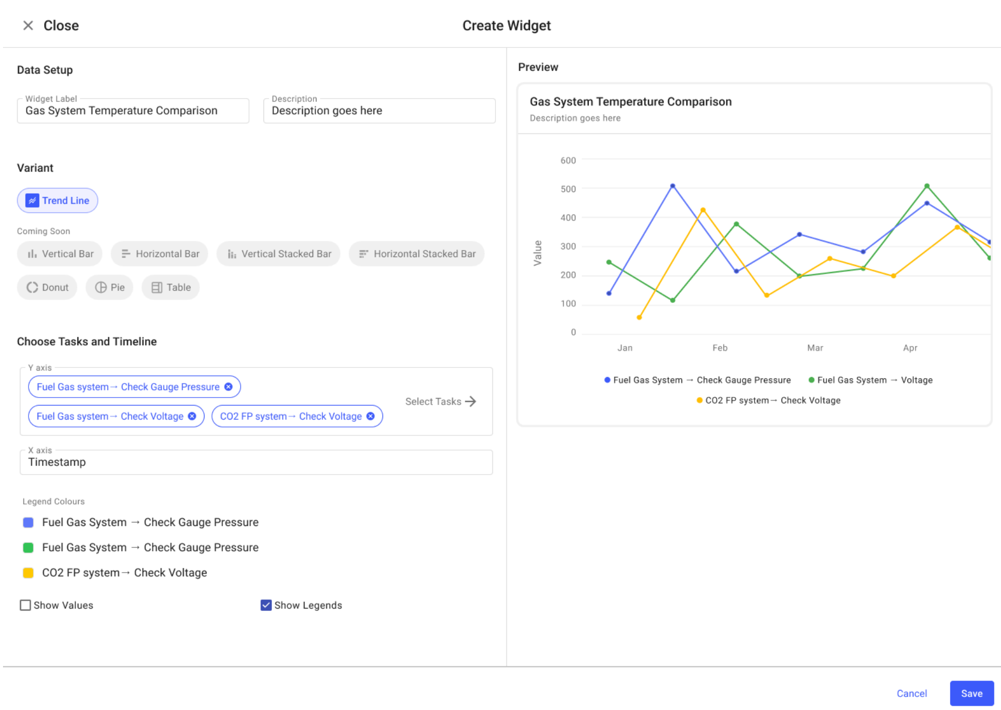
Learn how to create custom widgets that visually present essential reports and metrics. Using configurable data parameters, you can showcase various report types, such as task completion, compliance metrics, and equipment health. These widgets provide actionable insights for identifying trends, monitoring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

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

To create a widget:

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

Figure 5-2 Create Widget



3. In the **Widget Configuration** window,

a. Select the report from the **Report** list.

> **Note:**
> To select the report, the report should be created earlier. For more information, see *Create and Share Transactions and Rounds*.

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

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

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

j. Click **Save**.

The Widget is created successfully.

In the Dashboard screen, you can,

- Filter reports based on Last Day, Last Week, Last Month, Last 3 Months, Last 6 Months, or Custom.
- Filter reports based on Plant or Shift.
- Click the Restore icon to refresh the data in the widget.
- Click the Save as Image icon to save the widget as an image.
- Click the More icon and select **Edit** to edit the widget.
- Click the More icon and select **Copy** to copy the widget.
- Click the More icon and select **Delete** to delete the widget.
- Resize the widgets.
- Drag and drop widgets and change location.
- Click on the widget to see and download or export the detailed report in Excel format.
- Select the legend value in the widget to hide it from the widget (works only for Pie and Doughnut variants).

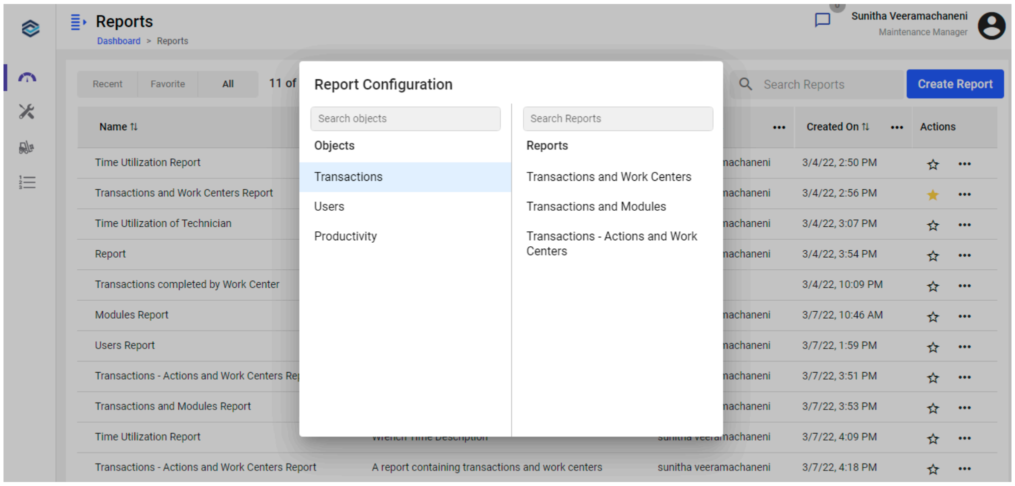
5.2. Create Transactions Reports

You can create a report for different types of transactions such as location based transactions, work center based transactions, and so on.

To create a report:

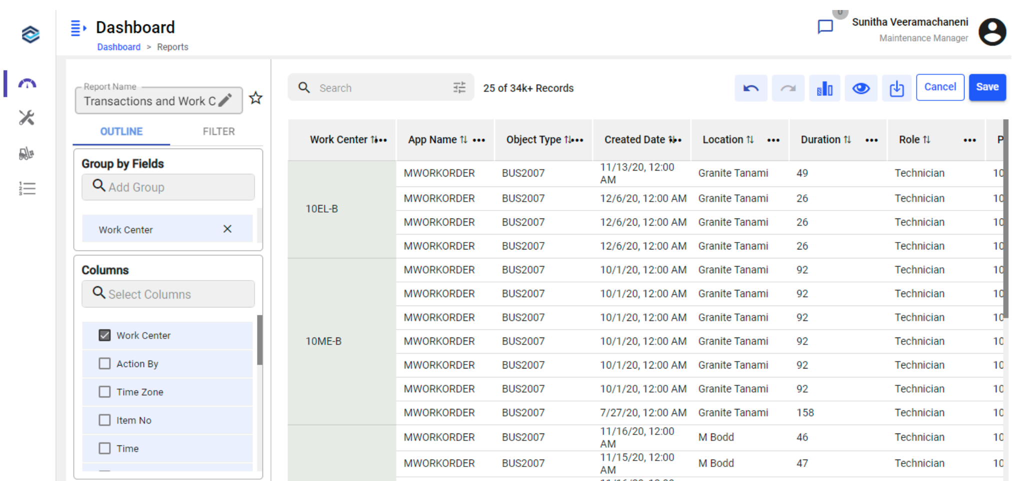
1. Click the **Reports** on the left-side pane.
2. In the **Reports** screen, click the **Create Report** button.

Figure 5-3 Select Objects and Reports



3. In the **Report Configuration** window,
   a. Select the **Objects** such as Transactions, Users, or Productivity on the left side.
   b. Select the **Reports** on the right side.
4. In the **Report Name** field, click the Edit icon to update the title of the report, if needed.
5. In the **Group by Fields** field, select or add the columns to group the data by the selected columns in the report.
6. In the **Columns** field, select the required columns to display in the report.
7. Click **Save** or **Save As** on the top right to save the report with a different name. The report is saved successfully.

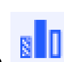
Figure 5-4 Add Report Details



In this screen, you can,

- Make the report favourite using the Favourite  icon next to the **Report Name** field.
- Search the columns using the **Search** bar.
- Apply the filters in the Filter  tab to load a few records.

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

- Undo and redo the actions that you have performed using the Undo  and Redo  icons.
- Show the data in the bar graph using the Bar Graph  icon.
- View the preview of the report using the Preview  icon.

- Download the report into excel format using the Download icon.
- Sort the columns in the table using the Sort icon.
- Hide, move left, move right, stick, and group the columns.

> **Note:**
> To access the **Hide Column**, **Move Left**, **Move Right**, **Stick**, and **Group Rows by this Column** options, click the More icon next to the columns.

> **Note:**
> To see **Reports**, click Hamburger menu on the top left and then click the Expand icon next to the Dashboard.

In this screen, you can,

- See the recent, favourite, and all reports.
- Search the reports using the **Search** bar.
- Sort the columns using the Sort icon next to the columns.
- Make the report favourite using the Favourite icon.
- View the preview of the report using the More icon > **Preview** option.
- Edit the report using the More icon > **Edit** option.
- Hide, move, stick, and group the columns in the table.
- Freeze the particular column using the **Stick** option.

> **Note:**
> To access the **Hide Column**, **Move**, **Stick**, and **Group Rows by this Column** options, click the More icon next to the columns.

- Export the report to excel format using the More icon > **Export to Excel** option.
- Copy the existing report to create a new report using the More icon > **Copy** option.
- Delete the report using the More icon > **Delete** option.

5.3. Compliance Reports

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

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

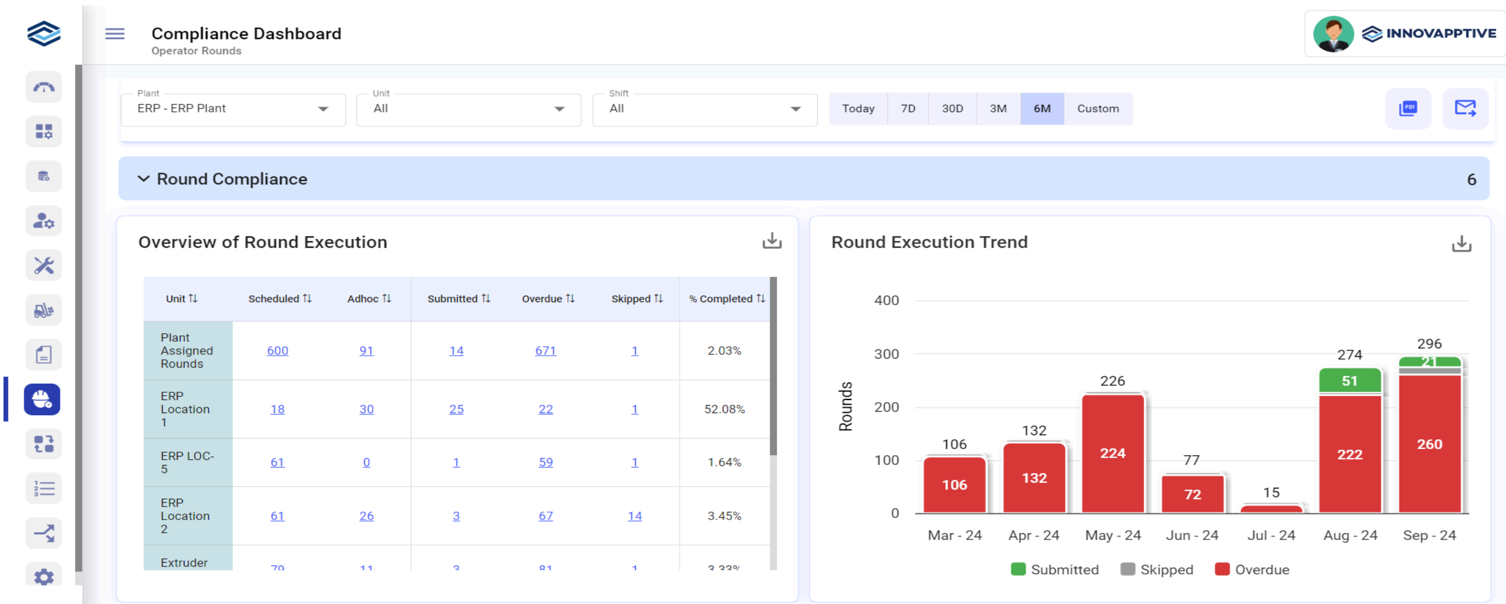
To view compliance reports:

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

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

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

Figure 5-5 Compliance Dashboard



In this screen you can,

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

5.4. Monitor Anomalies Using the Exceptions Dashboard

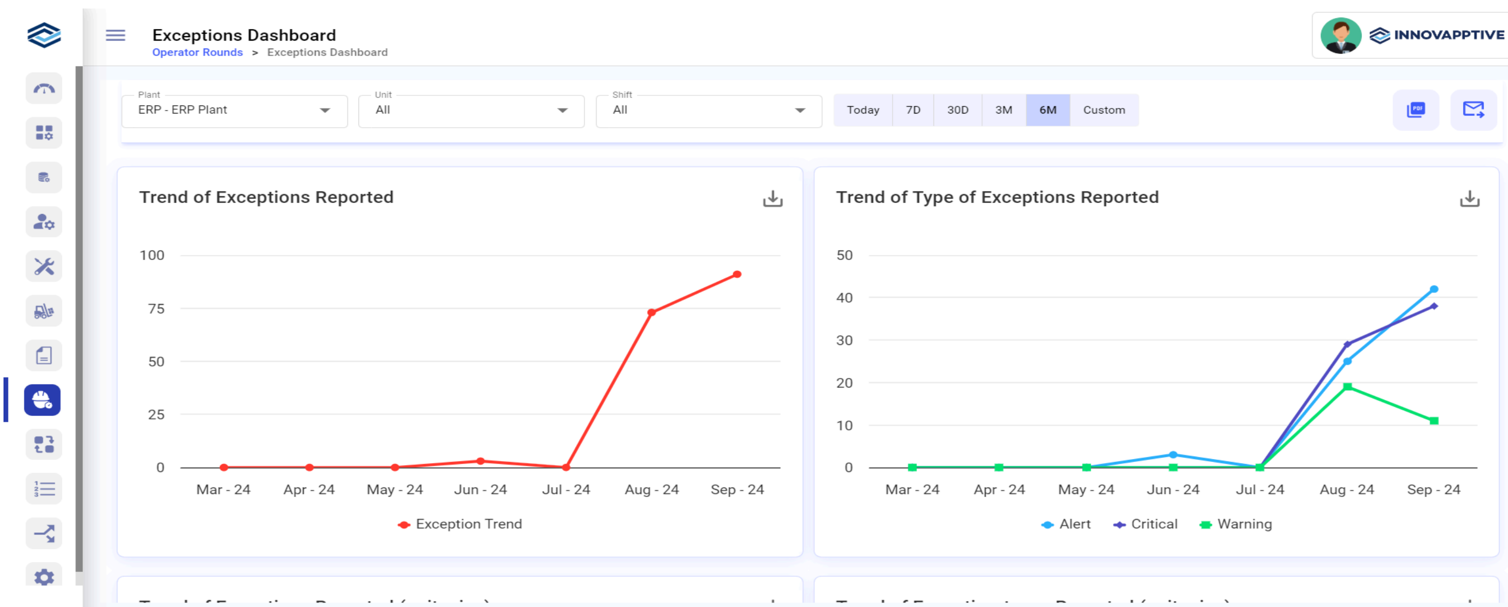
The **Exceptions Dashboard** helps you quickly identify and respond to issues that fall outside normal workflows or performance standards. It provides a real-time view of anomalies so you can take timely action before problems escalate.

The dashboard highlights critical exceptions, including:

- **Overdue Work Orders:** Identify work orders that were not completed within the scheduled time, and take immediate corrective action.
- **Missed Deadlines:** Flag rounds or tasks that were not executed as planned, and help maintain schedule adherence and accountability.
- **Pending Approvals:** Push the work items that need supervisor review, and ensure that approvals don't become bottlenecks.
- **Equipment Failures:** Highlight reported asset failures that need urgent attention, and reduce unplanned downtime.
- **Exceptions at Specific Locations or Assets:** Detect location-specific or asset-specific anomalies to localize issues and prioritize resources accordingly.

This visibility allows you as a supervisor to take corrective actions, reassign tasks, and allocate resources more effectively — minimizing delays and improving operational efficiency across the facility.

Figure 5-6 Exceptions Dashboard



In this screen you can,

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

5.5. Operator Productivity Dashboard

The **Operator Productivity Dashboard** gives supervisors a clear, real-time view of how individual operators and user groups are performing. It tracks key metrics such as round compliance, issue reporting, and follow-up actions—making it easier to identify trends, spot gaps, and recognize top performers.

Built-in **filters** and **drill-downs** allows to analyze performance by Plant, Unit, Shift, and time range—such as Today, Last 7 Days, Last 30 Days, 3 Months, 6 Months, or a Custom period.

- Use the **Search Bar** to quickly find specific operators.
- **Export performance data** (PDF or Excel) using the **download** or **Export Report** buttons.
- Sort by column headers like Name, Compliance, or Assigned Rounds.

Key Performance Widgets

At the top of the dashboard, four widgets provide quick insights:

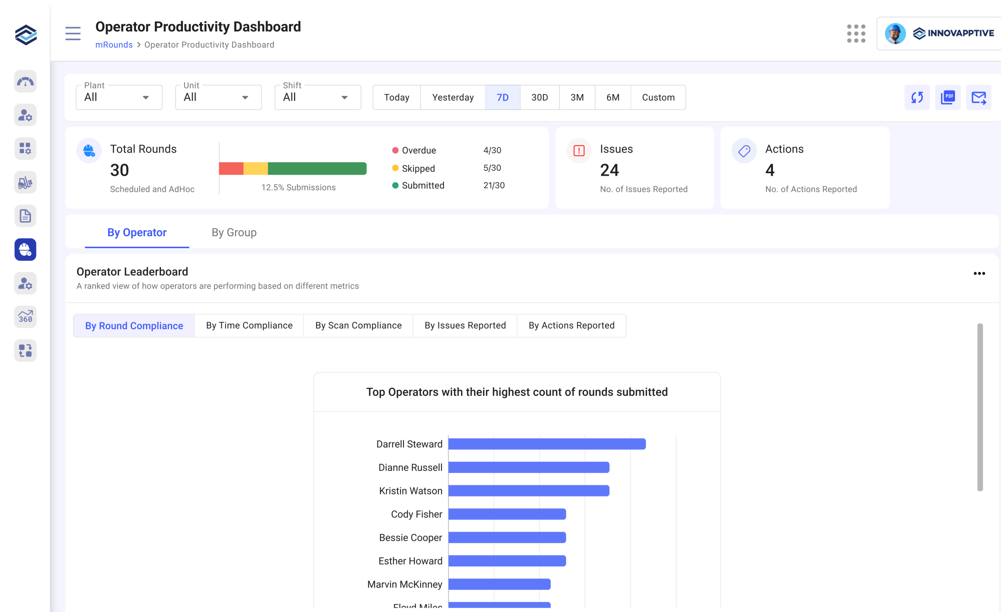
- **Round Compliance** – Shows how many rounds were completed vs. assigned, as both a count and a percentage.
- **Non-Compliance** – Highlights overdue rounds (missed deadlines) and skipped rounds.
- **Issues** – Displays the number of issues reported during rounds, helping prioritize maintenance and safety actions.
- **Actions** – Reflects the total follow-up actions recorded, such as corrective measures or maintenance requests.

The dashboard has two main tabs for deeper analysis: **By Operator** and **By Group**.

To view the Operator Productivity Dashboard:

1. Expand the left side menu, navigate to mRounds, **Operator Productivity Dashboard**.
2. Click **By Operator**, to view a breakdown of individual operator performance across multiple dimensions.
3. Click **By Group**, to view user group level performance and assess team-wide productivity and issue handling.

Figure 5-7 Operator Productivity Dashboard



5.5.1. Operator Productivity Dashboard - By Operator

This tab provides a breakdown of individual operator performance across multiple dimensions.

Performance Views

- **By Round Compliance** – Operators ranked by the number of rounds submitted.
- **By Time Compliance** – Evaluates how timely operators were in completing rounds.
- **By Scan Compliance** – Identifies operators with the most scan overrides.
- **Most Issues Reported** – Highlights operators who reported the most issues.
- **Most Actions Reported** – Shows operators with the highest number of follow-up actions.

Each row in the **Operator Performance Table** includes:

- **Operator Name**
- **Assigned** – Total rounds assigned in the selected time period
- **Submitted** – Rounds completed and submitted
- **Skipped** – Rounds not performed
- **Overdue** – Rounds submitted after the due time
- **Compliance** – Percentage of rounds submitted vs. assigned
- **Issues** – Number of issues raised by the operator
- **Actions** – Number of actions created from reported issues.

5.5.2. Operator Productivity Dashboard - By Group

This tab focuses on performance at the user group level, helping supervisors assess team-wide productivity and issue handling.

Group Performance Views

- **By Round Compliance** – Groups ranked by completion rate
- **By Time Compliance** – Based on timeliness of submissions
- **By Scan Compliance** – Highlights tag scanning compliance
- **Most Issues Reported** – Groups that identified the most issues
- **Most Actions Reported** – Groups that created the most follow-up actions.

User Group Performance Table

Each group record includes:

- **Group Name**
- **Users** – Number of users in the group
- **Assigned** – Total rounds assigned to the group
- **Submitted** – Rounds submitted
- **Skipped** – Rounds skipped
- **Overdue** – Rounds not completed on time
- **Compliance** – Submission rate as a percentage
- **Issues** – Total issues reported by the group
- **Actions** – Actions recorded based on those issues

5.6. Share Dashboard Data as PDF Reports

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

To download and share the reports:

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

   > **Note:**
   > You can use Configure Email Schedule to set up email scheduling details and migrate previously created data to support the new dashboards.

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

5.7. Share Round Plans

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

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

To download and share a Round Plan:

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

6. Create, Review and Schedule a Round Plan

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

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

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

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

A round plan has the following status:

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

This chapter has the following topics:

6.1. Understanding Response Types Used for Creating Round Tasks

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

Design your round plan task comprehensively to:

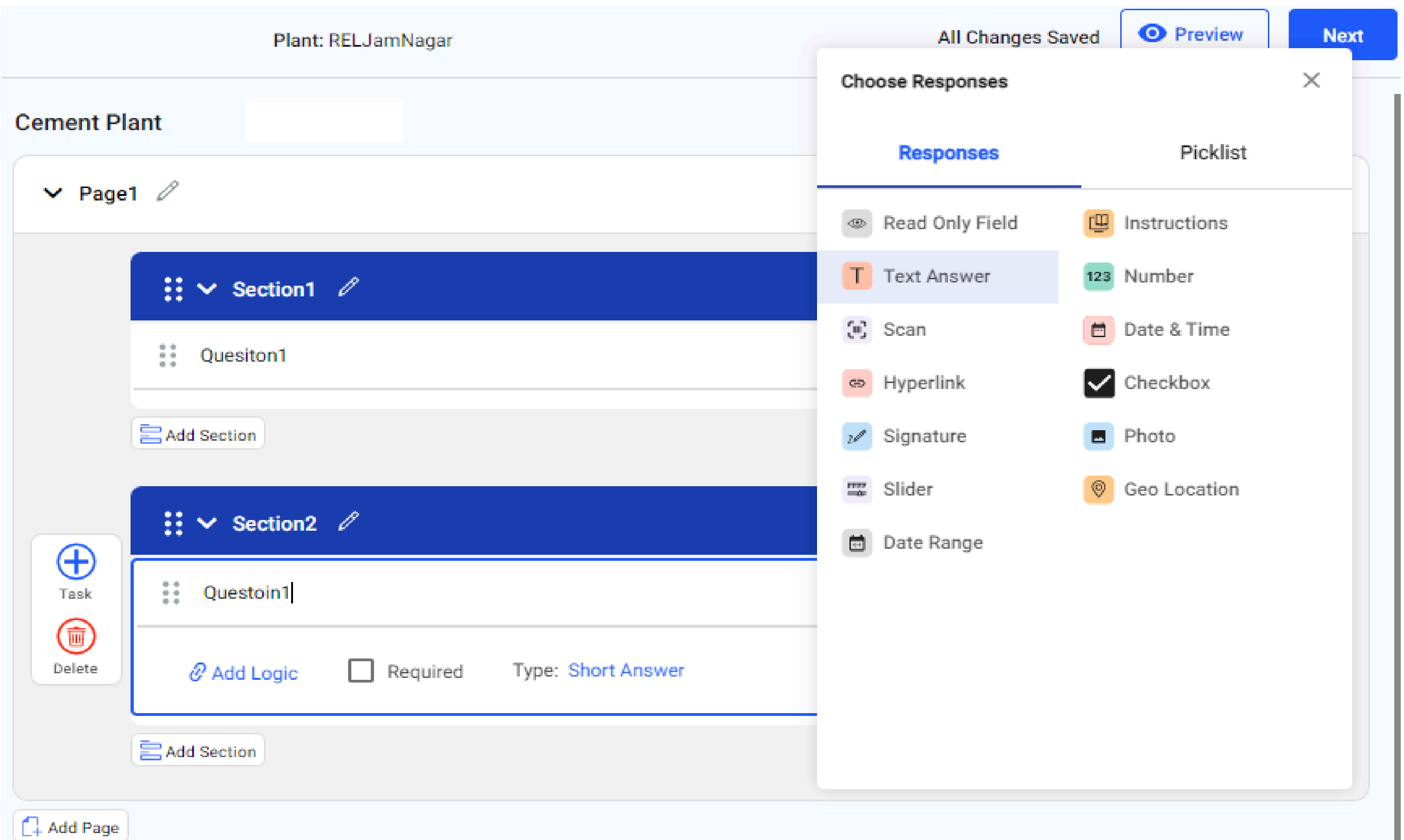
- Capture all the required information about the assets.
- Make it simpler to do maintenance checks in an orderly manner.
- Enhance the field user experience.

Follow the below pointers to create an effective round plan:

Pages and Sections

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

Structure round plans using the following hierarchy:



- **Pages**

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

- **Sections**

  Add sections inside each page to group relevant tasks together.

- **Tasks**

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

- **Standard Response Types**

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

  The application supports the following Standard Response Types:

  ◦ Read Only Field *(on page 95)*
  ◦ Text Answer *(on page 87)*
  ◦ Scan *(on page 85)*
  ◦ Hyperlink *(on page 96)*
  ◦ Signature *(on page 106)*
  ◦ Slider *(on page 97)*
  ◦ Date Range *(on page 98)*
  ◦ Instructions *(on page 86)*
  ◦ Number *(on page 88)*
    ▪ Number with the Unit of Measurement *(on page 90)*
    ▪ Number Range and Exceptions *(on page 91)*
  ◦ Date and Time *(on page 99)*
  ◦ Checkbox *(on page 100)*
  ◦ Attachment *(on page 100)*
  ◦ Geo Location *(on page 85)*
  ◦ Multiple Choice *(on page 101)*
  ◦ Global Picklist *(on page 103)*
  ◦ Conditional Logic *(on page 107)*.

6.1.1. Scan

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

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

To add scan response type:

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

6.1.2. Geo Location

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

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

To add Geo Location response type:

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

Figure 6-1 Geo Location Response Type

6.1.3. Instructions

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

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

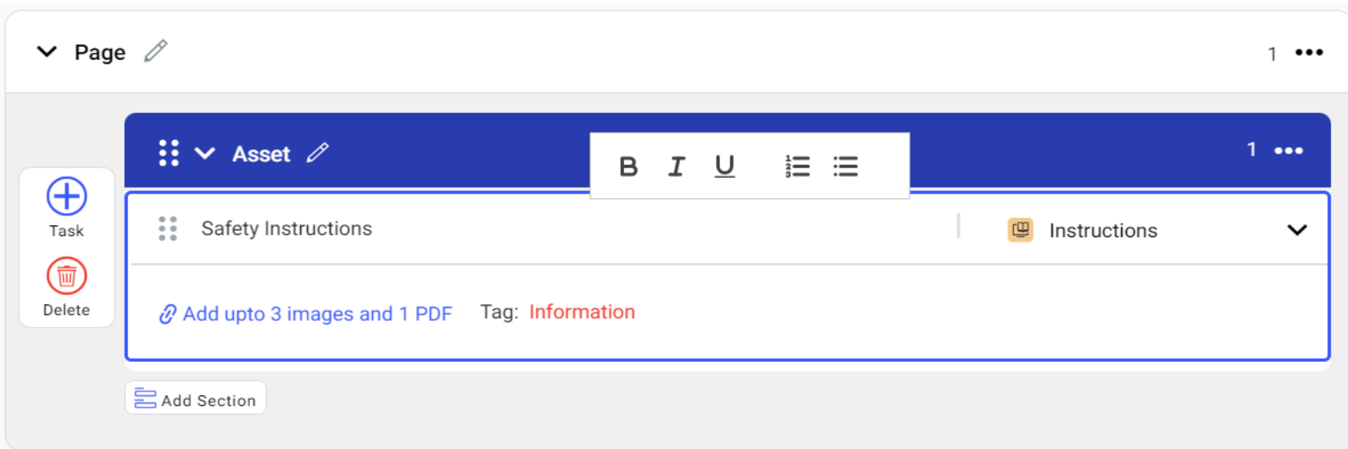
To add instructions response type:

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

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

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

Figure 6-2 Instructions Response Type



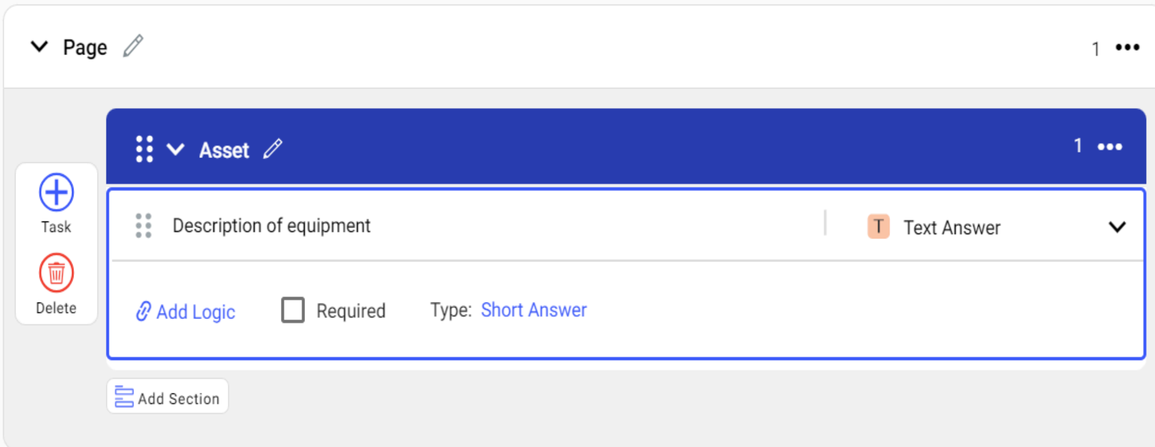
6.1.4. Text Answer

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

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

To add text answer response type:

1. Enter a task or question as Are there any visible leaks on the control valve?.
2. Select the **Text Answer** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 107)*.
4. Select the **Required** check box if the value is required.
5. Select the **Type** as **Short Answer** or **Long Answer**.



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

6.1.5. Number

Use the **Number** response type to capture measurable values such as pressure, temperature, or fluid levels during an inspection round. This option allows you to define units, set decimal values, acceptable ranges, and view historical readings. You can also **post the reading to SAP as a measurement document** by linking a measuring point to the task.

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

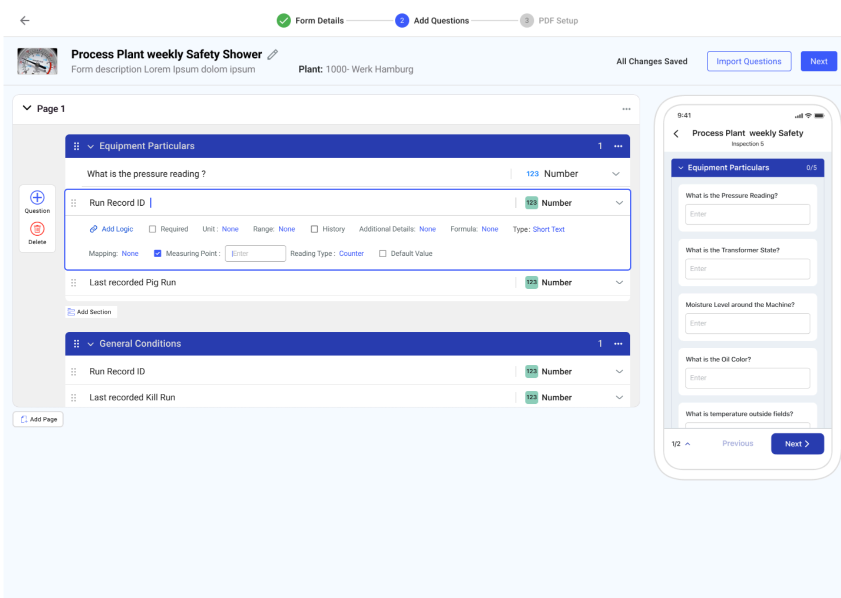
To add number response type:

1. Enter the task or question, such as Record the pressure reading from the valve gauge.
2. From the **Responses** dropdown, select **Number**.
3. Click **Add Logic** to define conditional logic for this task. (Optional) For more information, see Conditional Logic *(on page 107)*.
4. Enable the following options as needed:

- **Required** – Check this if the technician must enter a value (including decimal values) to complete the task.
- **Unit** – Choose from available units like meter (m), liter (l), Celsius (°C), etc. (For more, see: Number with the Unit of Measurement *(on page 90)*)
- **Range** – Define minimum and maximum values for the selected unit. (For more, see: Number Range and Exceptions *(on page 91)*)
- **History** – Select this to show past readings in the mobile app. Enter how many past values to display (e.g., 5).

> **Note:**
> This applies only to mRounds, not mInspections.

Figure 6-3 Measuring Point



5. Choose the Default checkbox and enter the value.
6. Check the **Measuring Point** box and enter the **Measuring Point ID** (as provided by SAP). Do this step, if you want the reading to be posted to SAP as a **measurement document**. The system automatically:
   - Posts the reading to SAP when submitted by the technician
   - Capture the **Measurement Document Number**
   - Display the document number on the Web application and in the submitted Round PDF
   - Include the document number in the **Shift Handover Report**.
7. Reading Type - Select how you want to record the measuring point reading:

   - **Difference:** Record the change in value since the last reading. Useful for tracking usage or consumption over time.
   - **Counter:** Enter the current total reading displayed on the equipment. Ideal when tracking a continuously increasing value like hours run, distance, or production count.
8. In the Additional Details window,
   a. Add tags in the **Tags** field.
   b. Add attributes **Label** and **Value**.
   c. Enable **Character Limit** and define min/max limits if needed.
   d. Click **Done**.

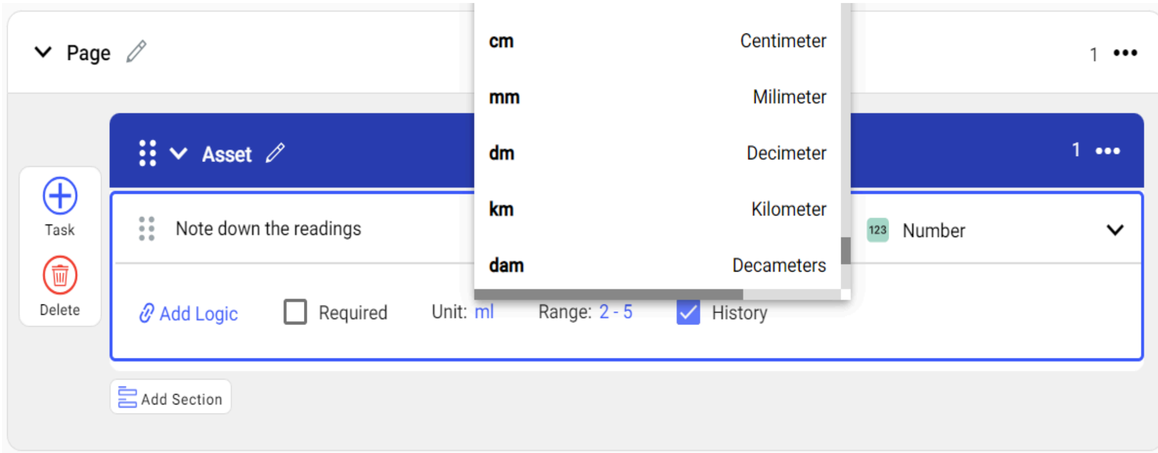
6.1.5.1. Number with the Unit of Measurement

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

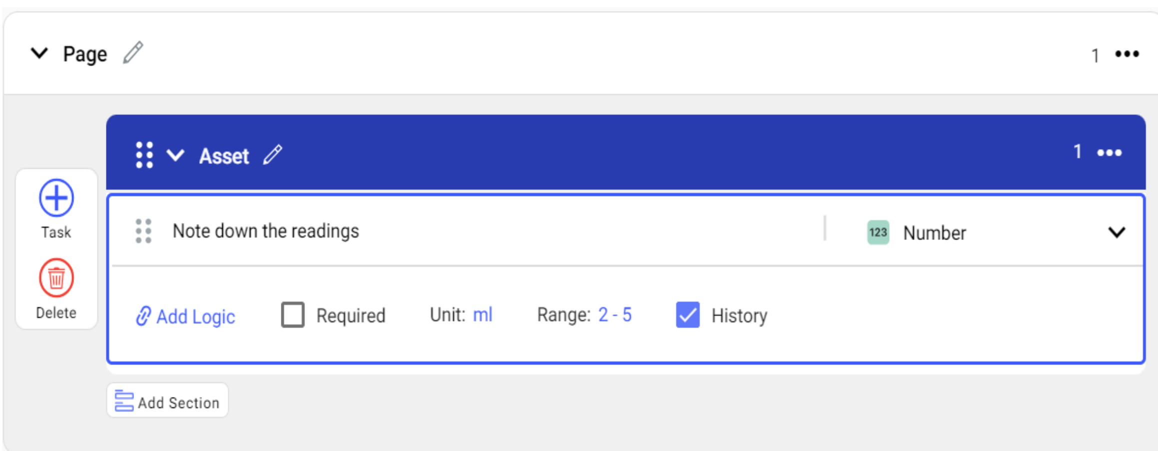
For example, the operator or technician records **85ºC**, which is within the acceptable range.

To add unit value:

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



5. Select the **Range** for the selected Unit. For more information, see Number Range and Exceptions *(on page 91)*.
6. Select the **Required** check box if the value is required.



6.1.5.2. Number Range and Exceptions

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

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

To add range value and add exceptions:

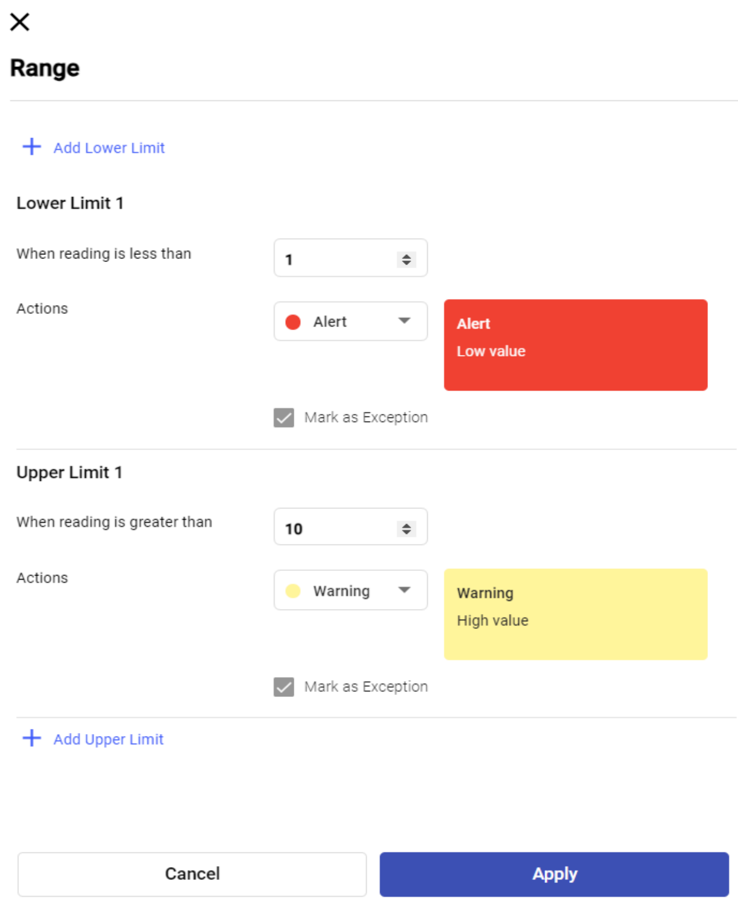
1. Enter a task or question as Does the valve actuator function within the specified range?.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the relevant **Unit** like Celsius (^{O}C) for the temperature. For more information, see Number with the Unit of Measurement *(on page 90)*.
5. Click the **Range** link and add range values for the selected Unit.
6. In the **Range** window,

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

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

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

Figure 6-4 Number Range



7. Click **Apply**.

6.1.5.3. Add Formulas to fields

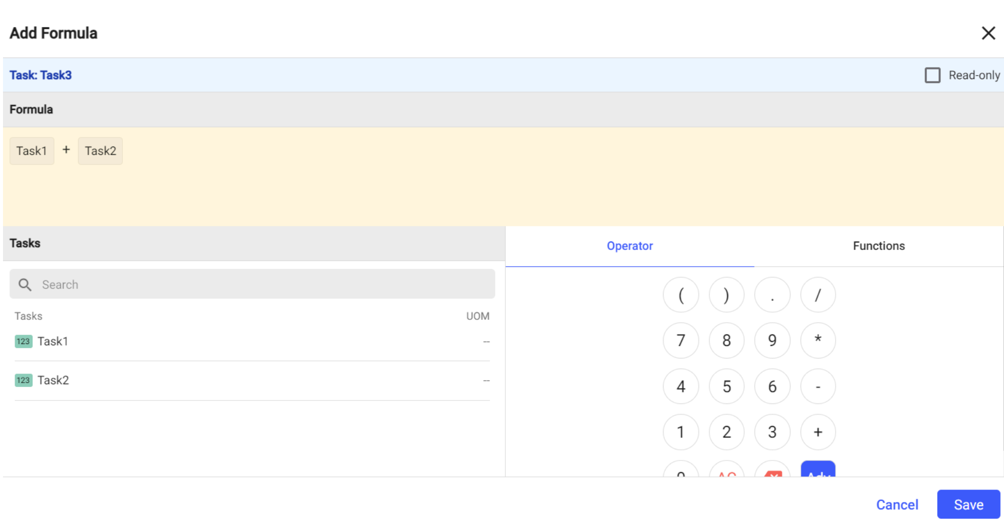
Formula in Number response type is used to automatically calculate values based on inputs from other fields. This is particularly useful for maintenance metrics like efficiency, operational performance, or usage calculations.

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

To add a formula to field:

1. Enter a task or question as Calculate Valve Efficiency.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the **Unit**. For example, meter (m), centimeter (cm), liter (l), Celsius (°C), and so on. For more information, see Number with the Unit of Measurement *(on page 90)*.
5. Select the **History** check box and add readings.
6. Click the **Formula** link.
7. In the **Add Formula** editor, add calculations and click **Save**.

Figure 6-5 Add Formula

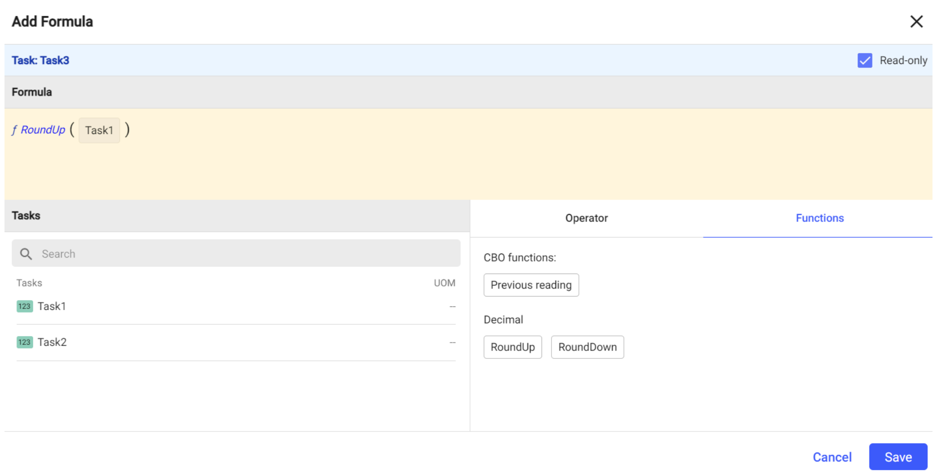


The configured formula is applied to the respective field and the calculated values are updated dynamically.

In this editor, you can,

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

Figure 6-6 Add complex formula



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

6.1.6. Read Only Field

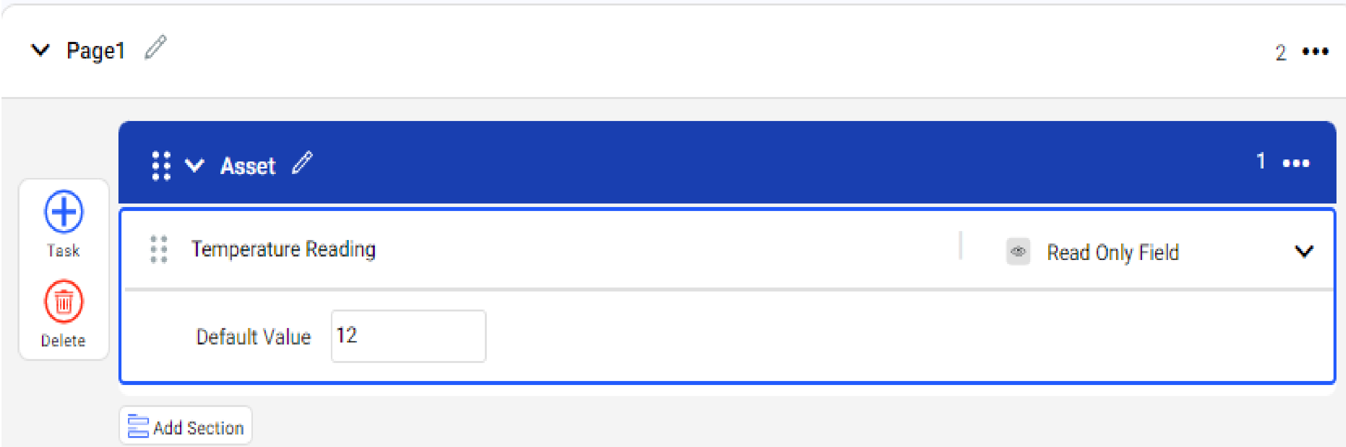
Read Only field response type is used in asset maintenance checks or inspections to display important information and prevent accidental changes to critical data. This response type is disabled for editing.

For example, Temperature threshold on a boiler unit.

To add read only field response type:

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

Figure 6-7 Read Only Response Type



6.1.7. Hyperlink

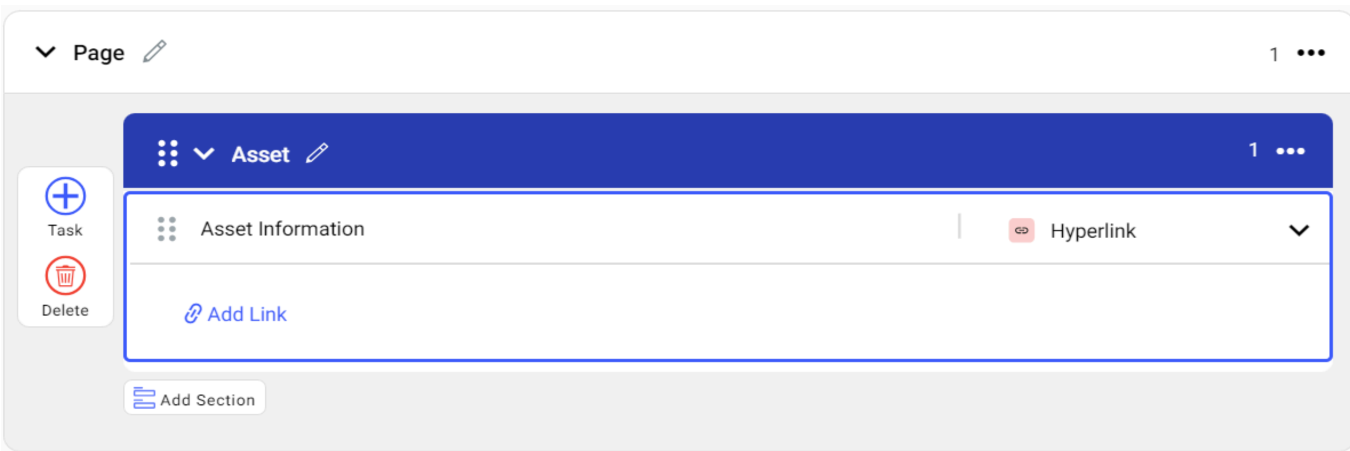
Hyperlink response type is use to link to external documents, such as user manuals or safety sheets.

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

To add hyperlink response type:

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

Figure 6-8 Hyperlink Response Type



6.1.8. Slider

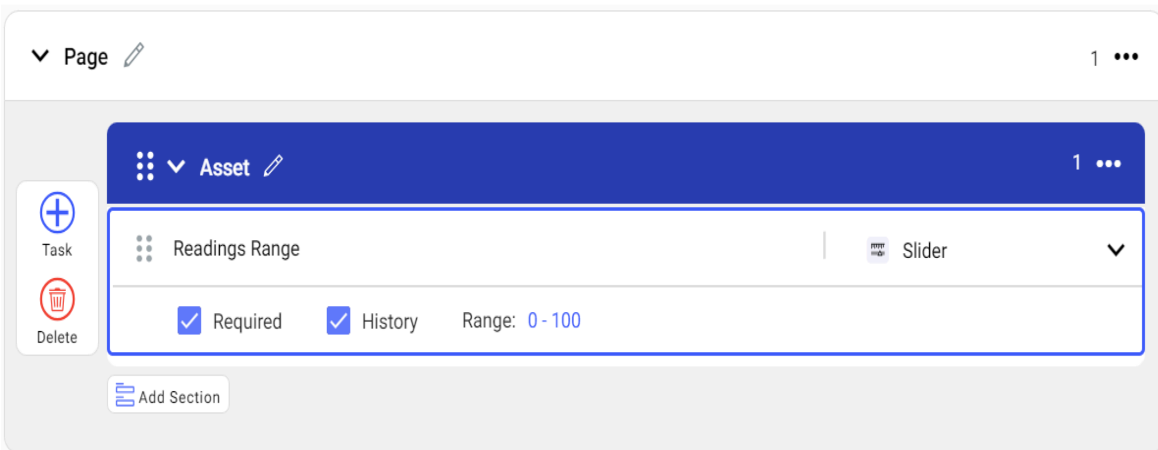
Slider response type is used to select a value from a continuous range for equipment performance parameters.

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

To add slider response type:

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

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



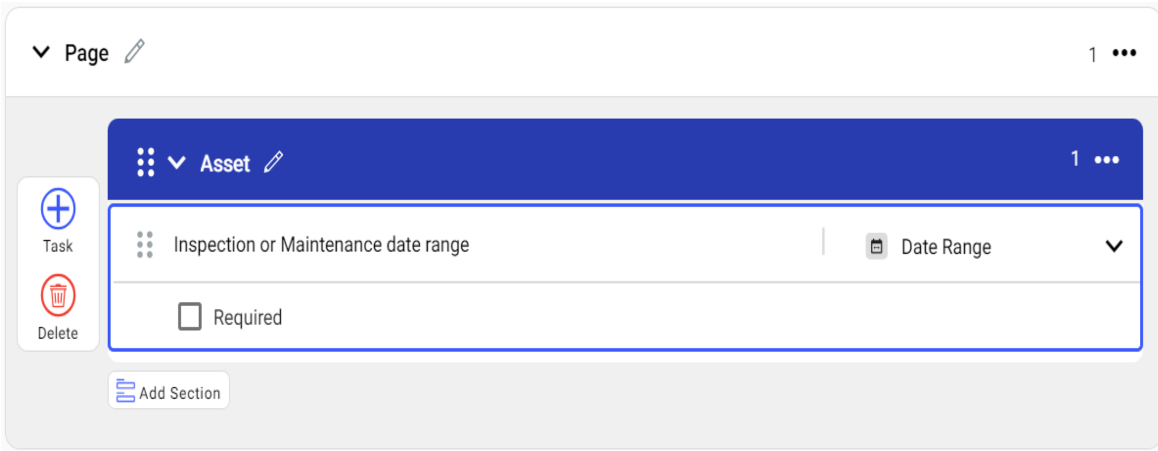
6.1.9. Date Range

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

For example, inspection date range.

To add date range response type:

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



6.1.10. Date and Time

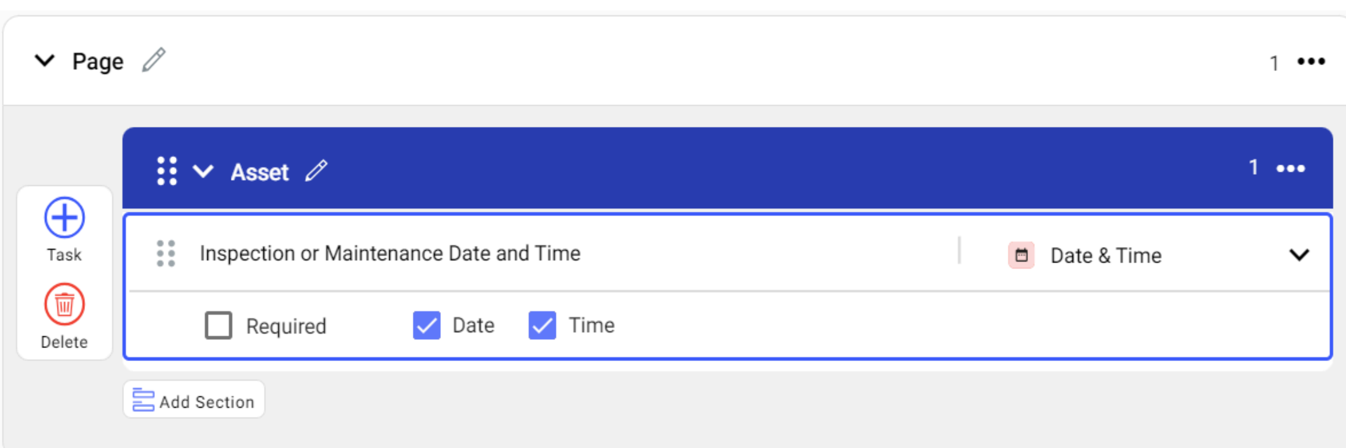
Date and Time response type is used to set future service dates or deadlines.

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

To add date and time response type:

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

Figure 6-9 Date and Time Response Type



6.1.11. Checkbox

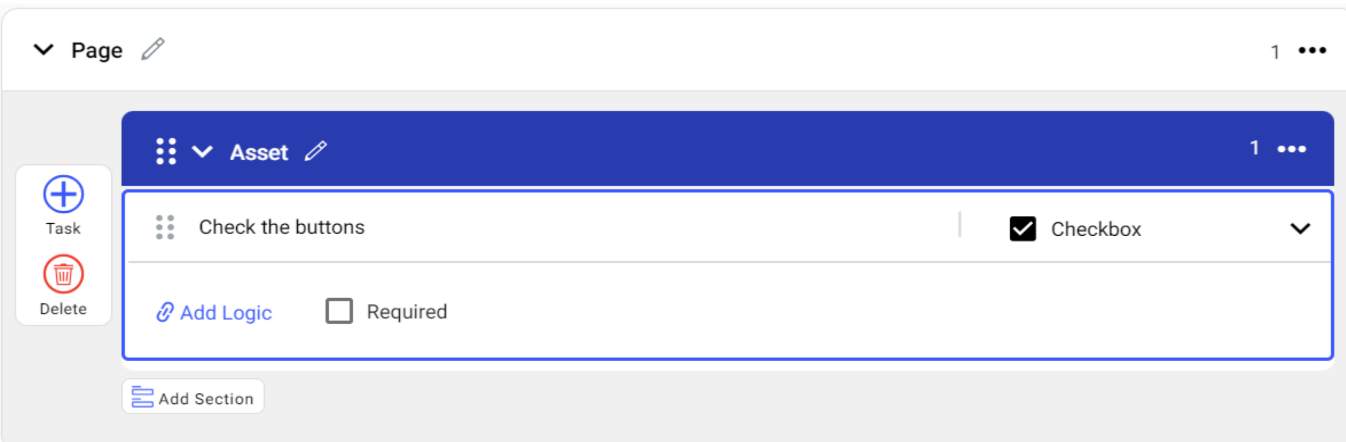
Checkbox response type is used to check off tasks as they are completed.

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

To add check-box response type:

1. Enter a task or question as Confirm that the valve inspection is complete.
2. Select the **Checkbox** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 107)*.
4. Select the **Required** check box if the value is required.

Figure 6-10 Checkbox Response Type



6.1.12. Attachment

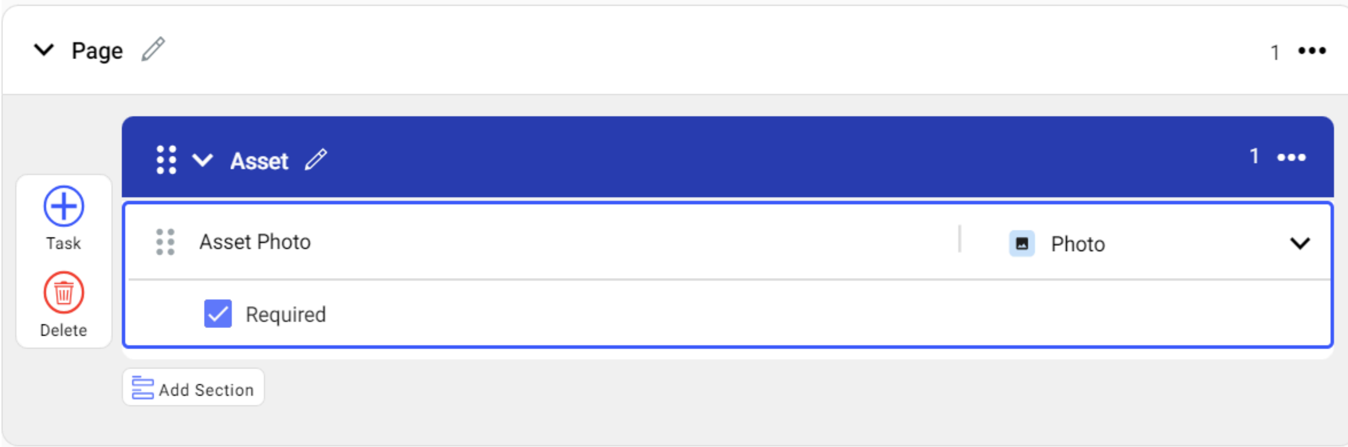
Attachment response type is used to upload files, such as photos or PDFs, to provide additional context.

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

To add photo response type:

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

Figure 6-11 Photo Response Type



6.1.13. Multiple Choice

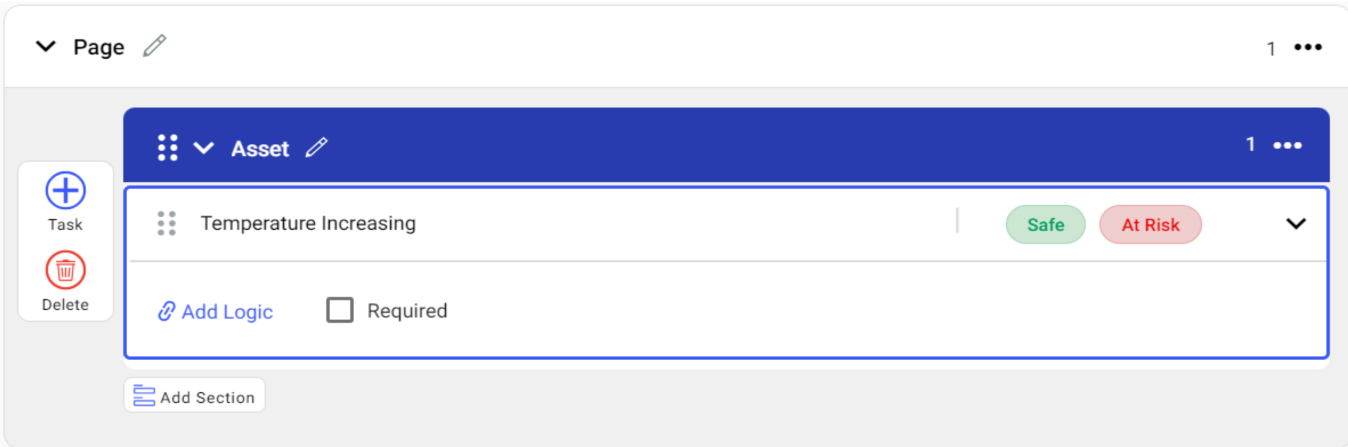
Multiple Choice is used to select predefined conditions for the equipment quickly.

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

To add multiple choice response type:

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

Figure 6-12 Multi Choice Response Type

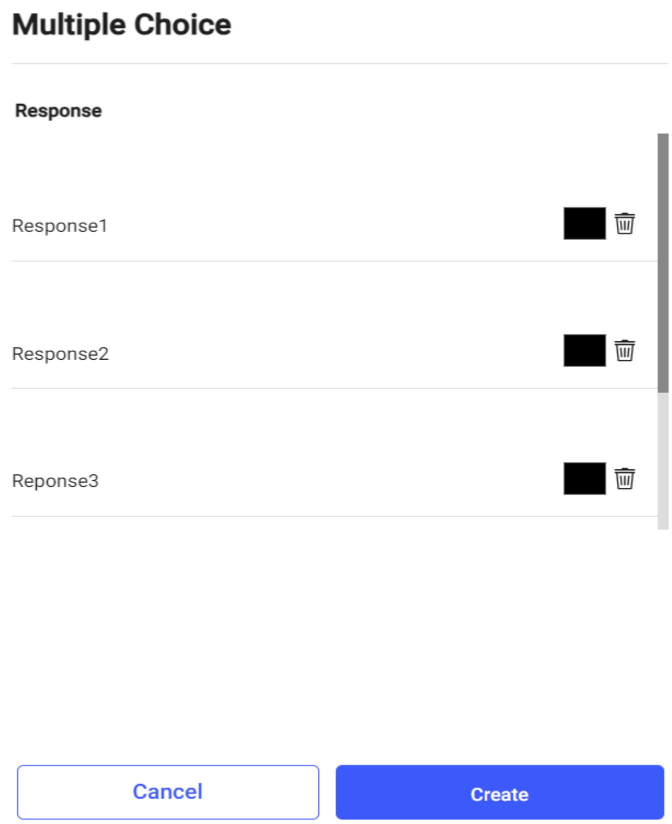


4. Click **Add More** if the required choice is not in the list.

Figure 6-13 Multiple Choice Add More

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

Figure 6-14 Add Multiple Choice Values



6. Click **Create**.

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

6.1.14. Global Picklist

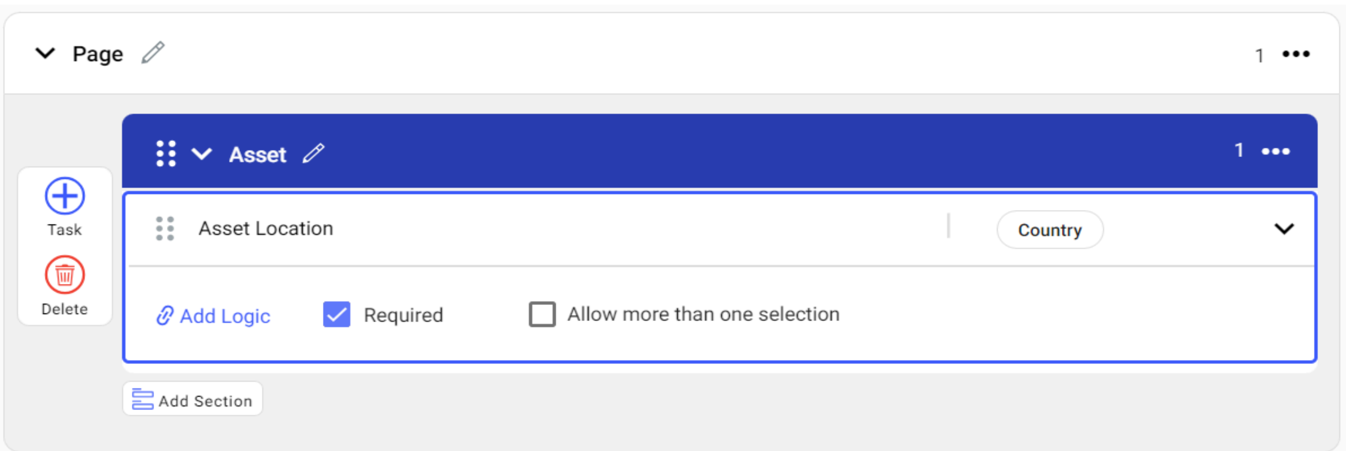
Global Picklist response type provides standardized lists that can be reused across different forms, ensuring consistent data entry such as, a list of manufacturers or equipment types.

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

To add global pick list response type:

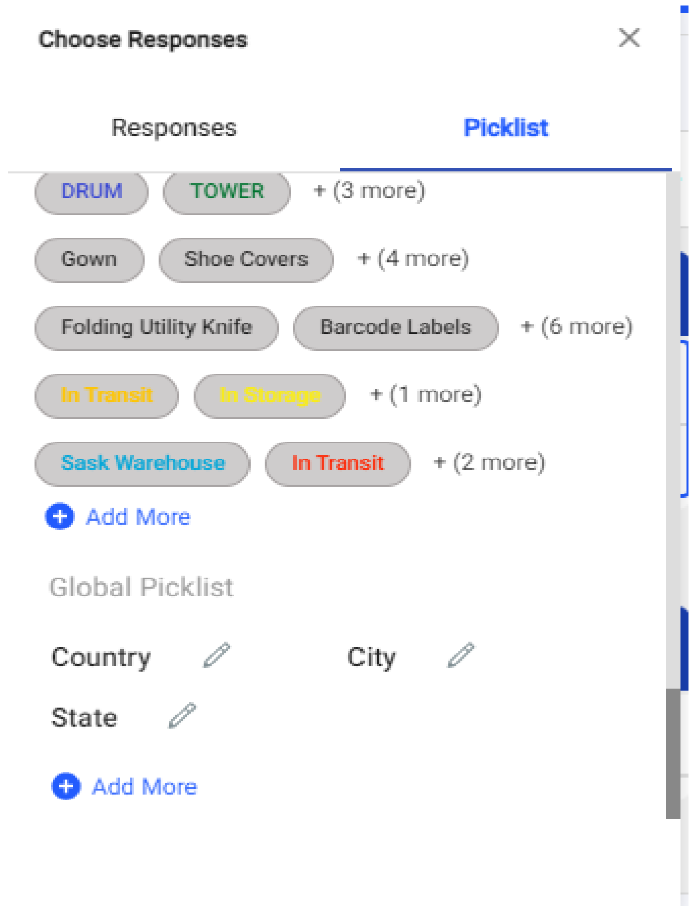
1. Enter a task or question as Select Valve Manufacturer.
2. Click the **Responses** drop-down and click the **Picklist** tab in the **Choose Responses** window.
3. Select the value in the **Global Picklist** section. For example, Country.
4. Click **Add More** in the Global Picklist section, if the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

Figure 6-15 Global Picklist Response Type



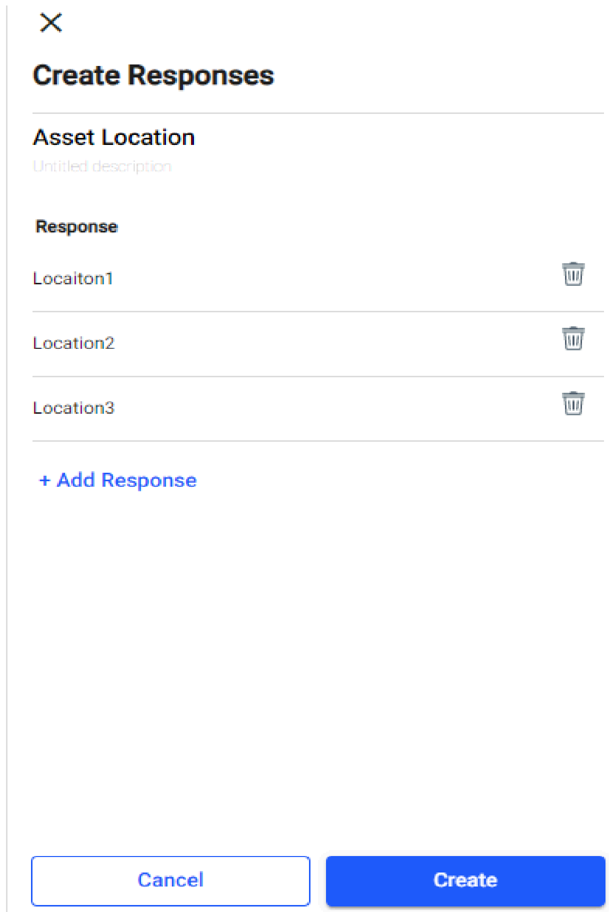
5. Click **Add More** if the required response is not in the list.

Figure 6-16 Global Picklist



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

Figure 6-17 Global Picklist Add More



7. Click **Create**.

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

6.1.15. Signature

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

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

To add signature response type:

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

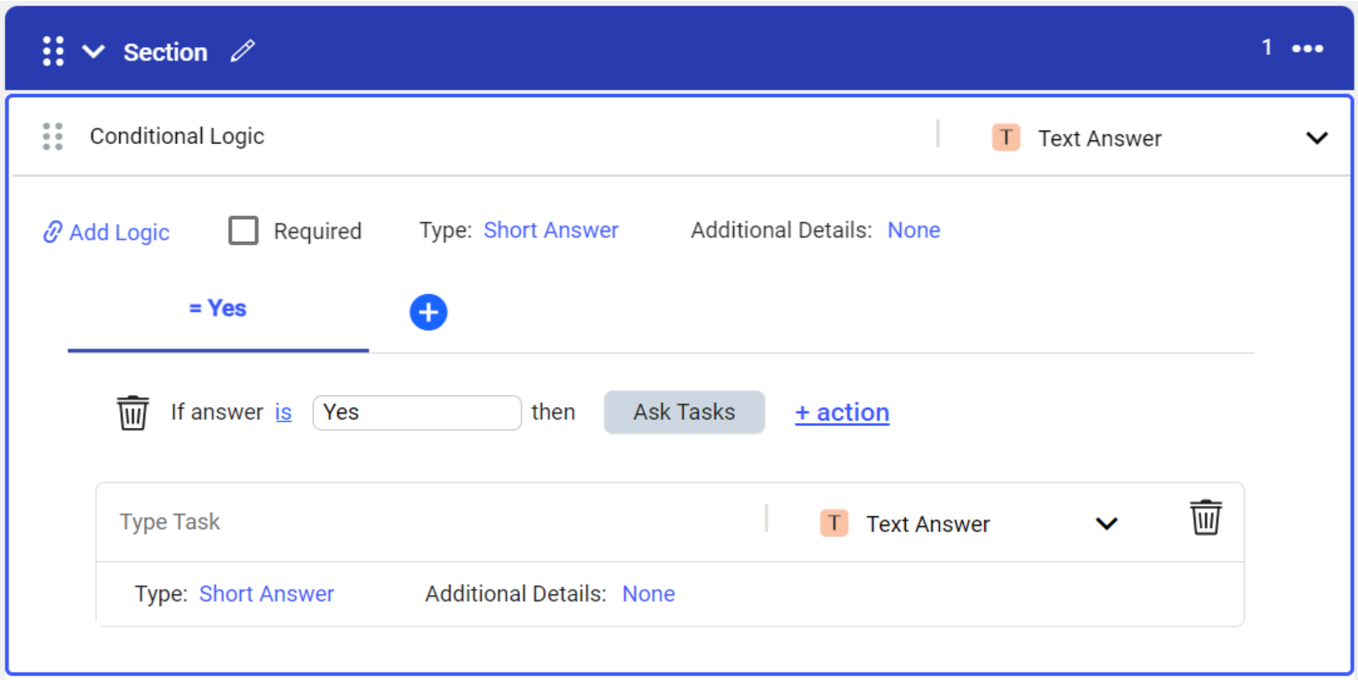
6.1.16. Conditional Logic

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

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

You can add logic for the following response types.

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



Add conditional logic: by following detailed example:

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

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

6.2. Create a Round Plan and Publish

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

To create a round plan:

1. Expand the **Operator Rounds** module and click **Round Plans** on the left-side pane.
2. In the **Round Plans** screen, click **Create New** and select **Create Manually** on the right side.

   Or

   Click select **Download Excel Template**.

   Fill the details in the template.

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

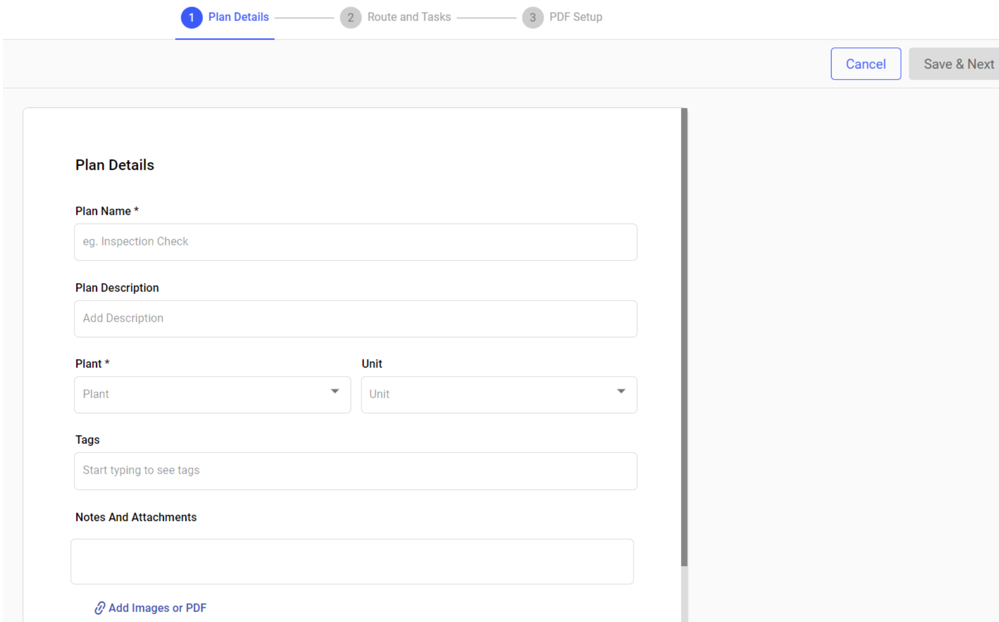
   The round plans are uploaded, and you can see them in the **Round Plans** screen with Draft status.

   Open the round plan.

   You can use predefined Excel templates to bulk upload multiple Round Plans or Form Templates simultaneously, or export them individually or in bulk using the same standardized Excel format structure.

   The **Plan Details** screen is displayed.

Figure 6-18 Fill Plan Details



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

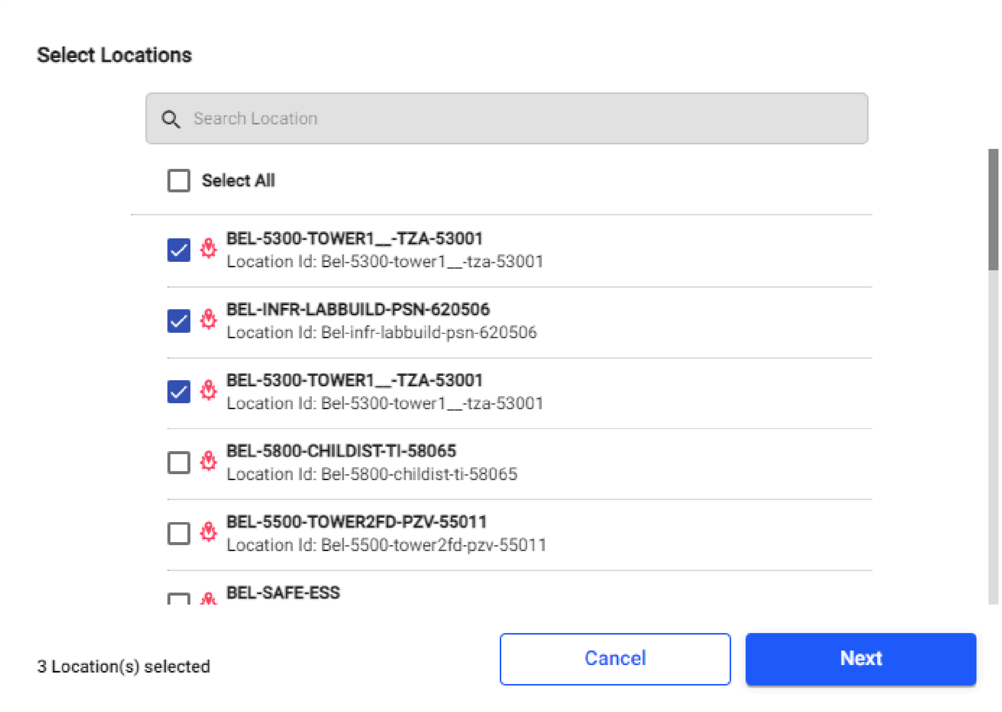
Table 6-1 Plan Details Screen Fields

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

Field	Description
	You can view additional notes and attachments such as safety instructions or manuals on the mobile application in offline mode and refer to them while executing the rounds in areas with poor or no network connectivity.
Zone	Select one or more zones from the list to execute the round within the selected zone by operator.
Enable Barcode Scanning	Use the **Enable Barcode Scanning** option to make barcode scanning mandatory for specific Round Plans.
Additional Details	Add additional details or fields. ◦ Click **Add**. ◦ Enter **Label** and **Value**. **Note:** You can add additional fields to provide situation-specific information that can be referenced by the operator in the mobile application. You can configure the label and values for these attributes, with a maximum of 25 characters for the label and 40 characters for the value. You can update and delete the field values at any time, even after round plans are created and scheduled.

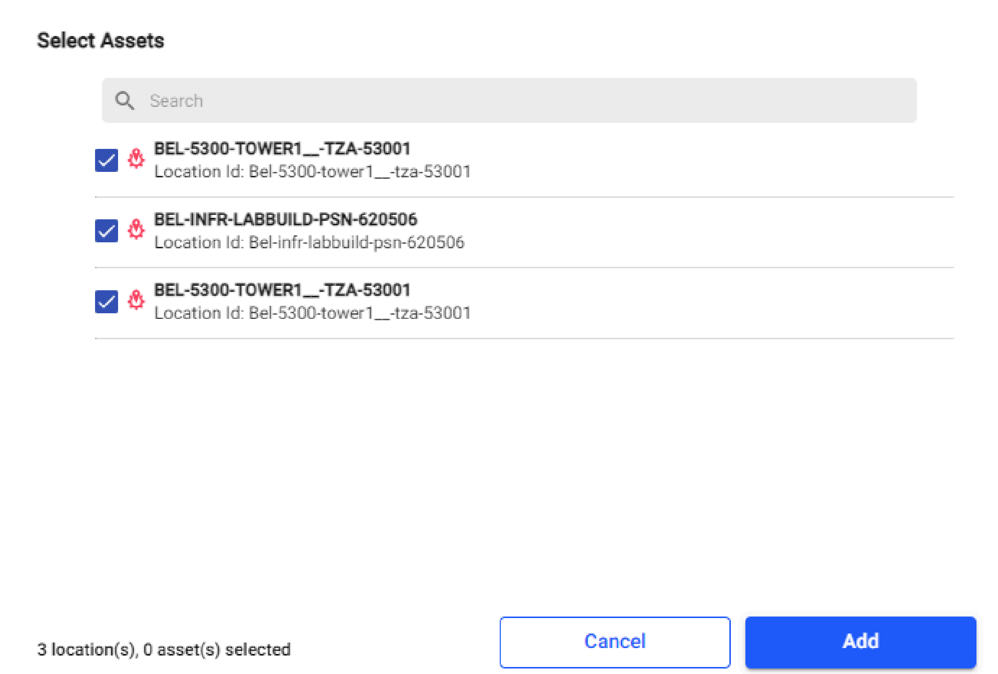
4. Click **Save & Next**.
5. In the **Select Locations** window, select locations and click **Next**.

Figure 6-19 Select Locations



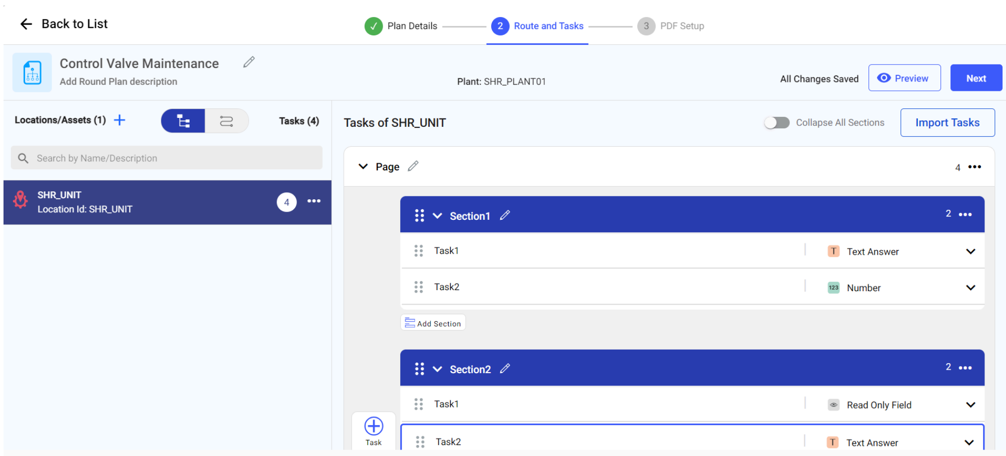
6. In the **Select Assets** window, select assets and click **Add**.

Figure 6-20 Select Assets



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

Figure 6-21 Location and Asset Hierarchy



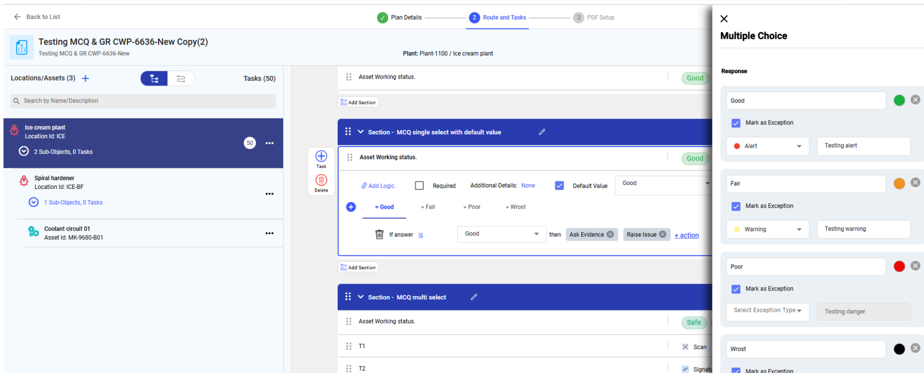
7. In the **Route and Tasks** screen, select the location or asset on the left side, create a round plan with multiple sections, add tasks and response types for the selected location or asset:
   - To add locations and assets from the left side pane click the Add Locations/ Assets + icon. You can drag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

- **Type Task**: Enter the task in the text box.
- **Responses**: Select the relevant response type from the drop-down. For information about each response type, see Understanding Response Types Used for Creating Round Tasks *(on page 82)*.
- **Add Logic**: Click **Add Logic** to create a logical question along with actions. This logical question is more likely of multiple-choice responses like Yes or No. For more information, see Conditional Logic *(on page 107)*.
- **Required**: Select the check box to make the question mandatory to fill.
- **History**: Select the check box to see the last five transactions. This option is available only for Number and Slider response types.
- **Additional Details**: Click **Add** to add additional details for the task. In the Additional Details window, add Tags, and Attributes (Labels and Values).

> **Note:**
> Additional details provide situation-specific information that can be referenced by the operator. You can configure the label (up to 25 characters) and values (up to 40 characters) for these attributes.
>
> For multiple-choice and pick-list response types, you can mark specific values as exceptions to highlight abnormal conditions.
>
> **Example:** Consider a task to assess the condition of a motor using a pick-list response:
>
> - **Condition of Motor:**
>   - ✅ **Normal**
>   - ⚠# **Abnormal** *(marked as an exception)*

When generating task exception reports, the system will flag responses marked as exceptions, allowing planners to quickly identify issues and take necessary actions.

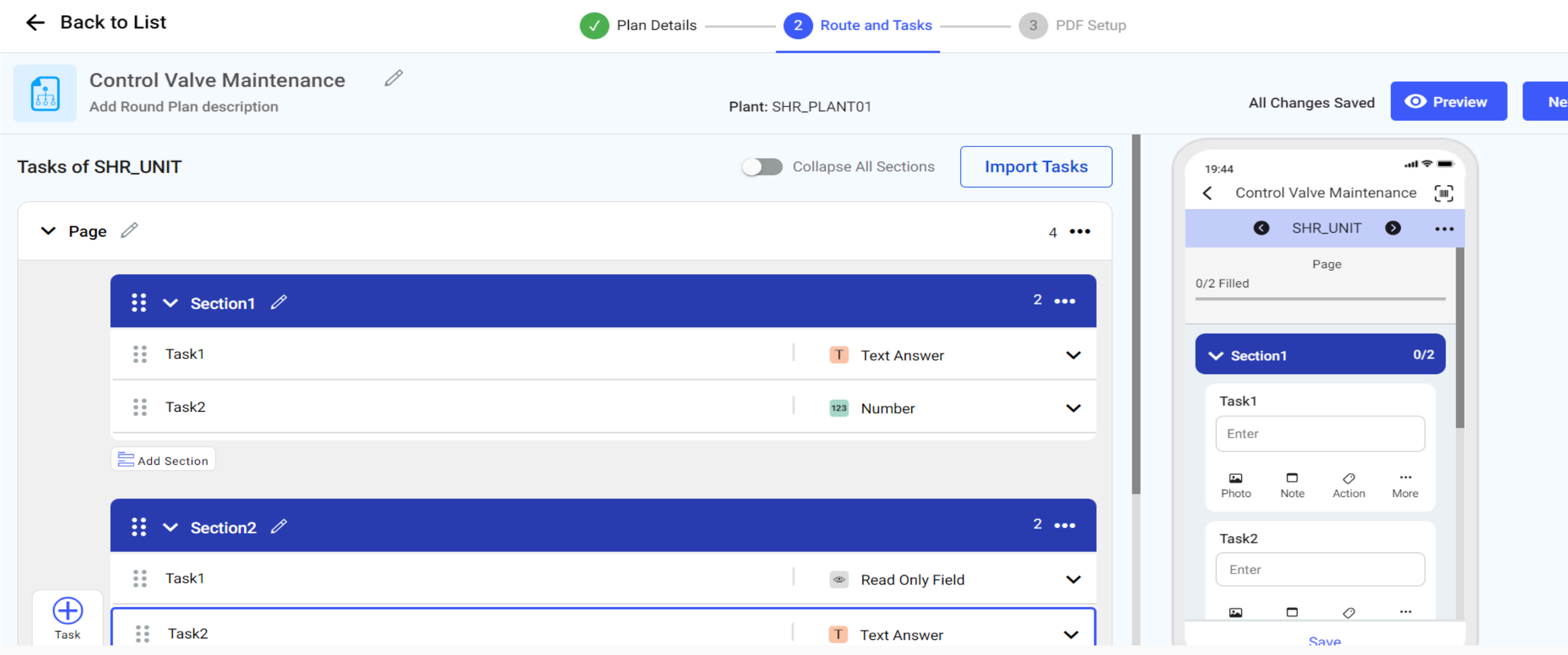
Figure 6-22 Respose Type Exceptions



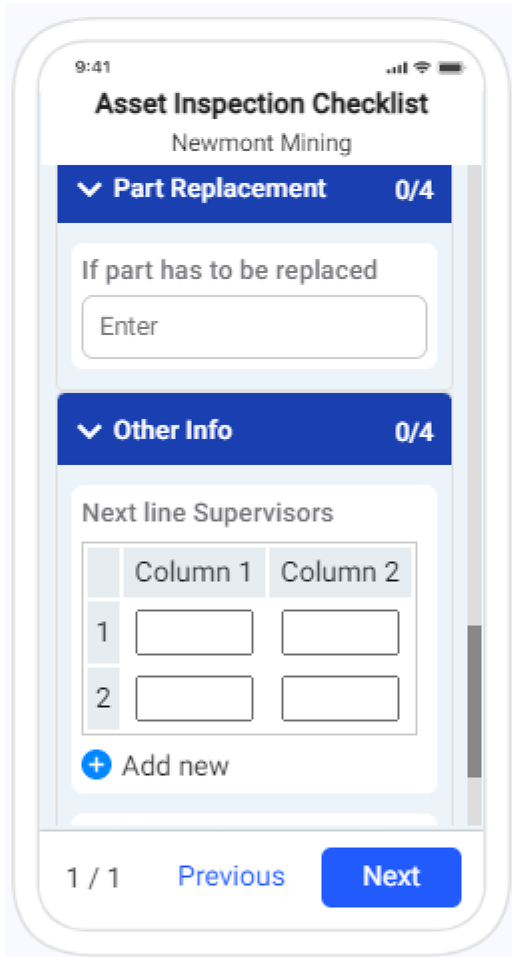
- You can import sections and tasks from the template to create a round plan quickly. For more information, see Import Round Plans from Template *(on page 124)*.
- You can use predefined Excel templates to bulk upload multiple Round Plans or Form Templates simultaneously, or export them individually or in bulk using the same standardized Excel format structure.

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

Figure 6-23 Round Plan Preview



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



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

Figure 6-24 Round Plan PDF Format

In the **PDF Setup** screen, you can configure the PDF as needed. For more information, see Configure Round Plan Details PDF *(on page 128)*.

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

    Or

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

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

6.2.1. Manage Round Plans

While creating round plans, you might need to modify tasks, sections, and pages for better organization.

Round plans screen help you with the following round management tasks.

- Quickly add and duplicate components
- Move tasks between locations
- Customize plan's structure
- Efficiently organize workflow

The following sections will guide you through managing tasks, sections, and pages during round plan creation, helping you build a comprehensive and flexible plan.

6.2.1.1. Manage Tasks in a Round Plan

Learn how to copy tasks to different locations or assets in a Round Plan and perform other task actions like cut, paste, and copy below.

Copy to All Locations and Assets

1. Right-click on the task.
2. Select **Copy to**.
3. Choose **All Locations / Assets**.
4. Click **Continue to Copy** to copy the task to all locations present in Route Plan view.

Copy to Custom Locations & Assets

1. Right-click on the task.
2. Select **Copy to**.
3. Choose **Custom Locations / Assets**.
4. In the **Select Locations / Assets to Copy** window, select desired locations and assets.
5. Click **Done**.
6. Click **Continue to Copy** to copy the task to selected locations and assets.

Other Task Actions

- **Cut Task:** Right-click on the task and select **Cut**.
- **Paste Task:** Right-click on the task and select **Paste**.
- **Copy Task Below:** Right-click on the task and select **Copy Below** to copy the task directly below the current task.

6.2.1.2. Manage Sections in a Round Plan

Learn how to add, copy, link, unlink, and delete sections in a Round Plan, as well as view task counts for each section.

Adding and Copying Sections

1. To add more sections, click the **Add Section** button.
2. Copy sections using these methods:
    - **Copy Below:** Click the More icon > select **Copy Below** on the right-side of the section.
    - **Copy Above:** Click the More icon > select **Copy Above** on the right-side of the section.
    - **Copy Section to:** Click the More icon > select **Copy Section to** to copy the section to all or specified locations/assets

Section Linking and Deletion

- **Unlink Section:** Click the More icon > select Unlink Section on the right-side of the section.

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

- **Delete Section:** Click the More icon > select Delete on the right-side of the section.

  Caution: You cannot delete tasks that are part of a template

Additional Section Information

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

6.2.1.3. Manage Pages in a Round Plan

Learn how to add, copy, and delete pages in a Round Plan.

Adding and Copying Pages

1. To add more pages, click the **Add Page** button.
2. Copy pages using these methods:
   - **Copy Below:** Click ••• and select **Copy Below** on the right-side of the page.
   - **Copy Above:** Click ••• and select **Copy Above** on the right-side of the page.
   - **Copy Page to:** Click ••• and select **Copy Page** to to copy the page to all or specified locations / assets.

Deleting Pages

- Click ••• and select **Delete** on the right-side of the page to delete the page.

6.2.2. Example of Round Plan Creation

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

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

1. In the **Round Plans** screen, click **Create New** at the top-right corner.
2. In the **Plan Details** screen, fill out the following fields:
    - **Plan Name**: Enter **Control Valve Maintenance**.
    - **Plan Description**: Enter **Inspect and maintain control valves to ensure operational safety and prevent leaks**.
    - **Plant**: Select **1000 - Plant MH**.
    - **Tags**: Enter **Control Valve, Safety, Maintenance**.
    - **Notes**: Attach relevant documents such as the **Safety Guidelines** for handling control valves.
3. Click **Save & Next**.
4. In the **Select Locations** window, choose the location **BEL-5500-TOWER2FD-PZV-55011**.
5. In the **Assets** window, select the asset **Control Valve BEL-5500-TOWER2FD-PZV-55011**.
6. Click **Add Page** to create sections.
7. Add following sections inside the **Page 1**:
    - Section 1: **Control Valve Performance**
    - Section 2: **Control Valve Readings**
8. Open the Section 1 and add the following:
    - Add task 1 as **Does the control valve show any signs of sticking during operation?** and select **Short Text Answer** response type.
    - Add task 2 as **Are there visible leaks around the control valve body?** and select **Long Text Answer** response type.
    - Add task 3 as **Are the control valve position indicators functioning?** and select **Number** response type.
9. In Task 3, add logic to check whether readings are correct.
    - If the operator selects **No**, prompt them to raise an issue and upload a photo of the valve.
10. Open Section 2 and add the following:
    - Task: **Is the control valve displaying accurate temperature readings?**.
    - **Response Type**: Number with unit (°C).
    - **Set range**: Lower Limit 50°C, Upper Limit 100°C.
    - **Conditional Logic**: Raise an alert if outside the range.
11. Click **Preview**.
12. Click **Next** to view the preview in PDF format.
13. Click **Publish**.

6.2.3. Import Round Plans from Template

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

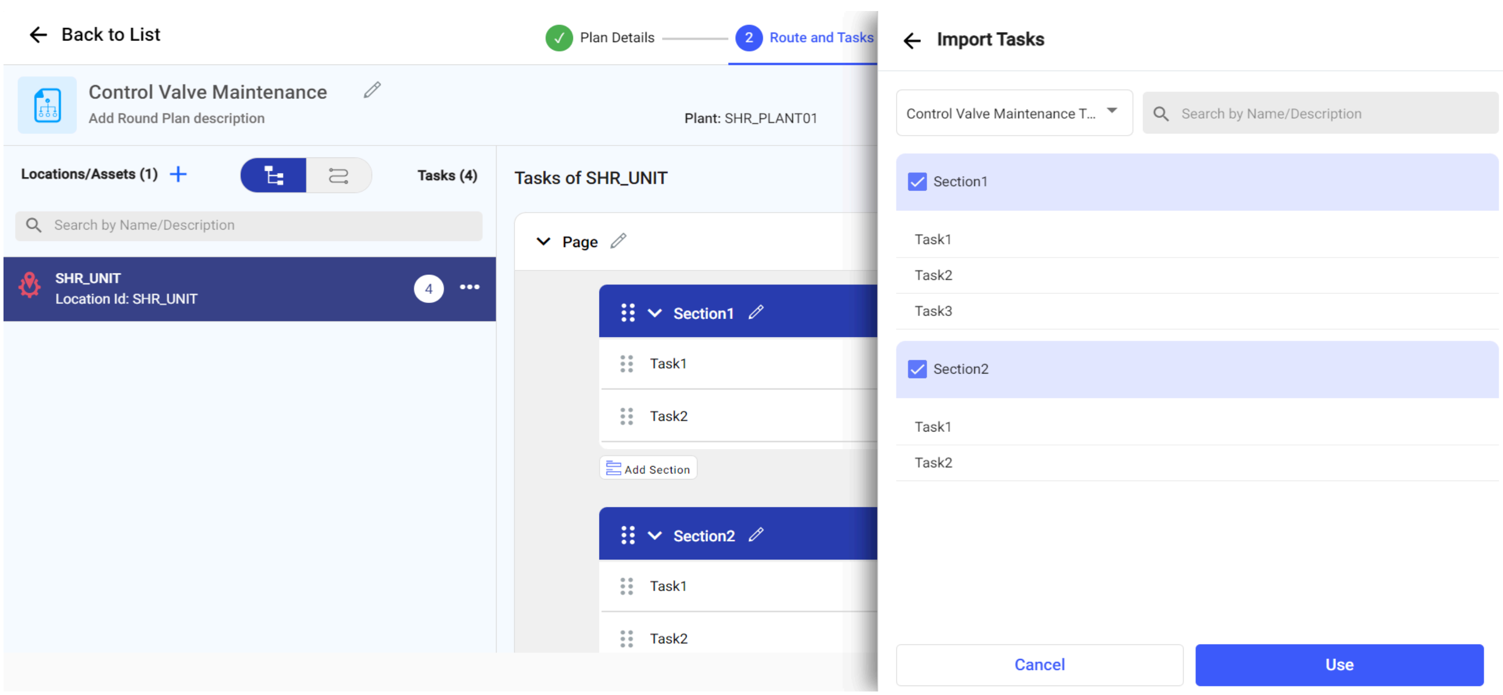
To import sections and tasks from the template:

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

   or

   Select the existing round plan and click **Edit Round** on the right-side window
3. In the **Plan Details** screen, update the details like **Plan Name**, **Plan Description**, **Tags**, **Notes and Attachments**, & **Additional Details**.
4. Click **Save & Next**.
5. Click the **Import Tasks** button on the right side.
6. In the **Import From** window, you can see two tabs: Templates and Round Plans.
7. Choose the appropriate tab based on the source from which you want to import tasks.
8. From the list, select a template or Round Plan to import the sections and tasks.

Figure 6-25 Import Tasks



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

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

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

6.2.4. Create Round Plans from Existing Ones

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

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

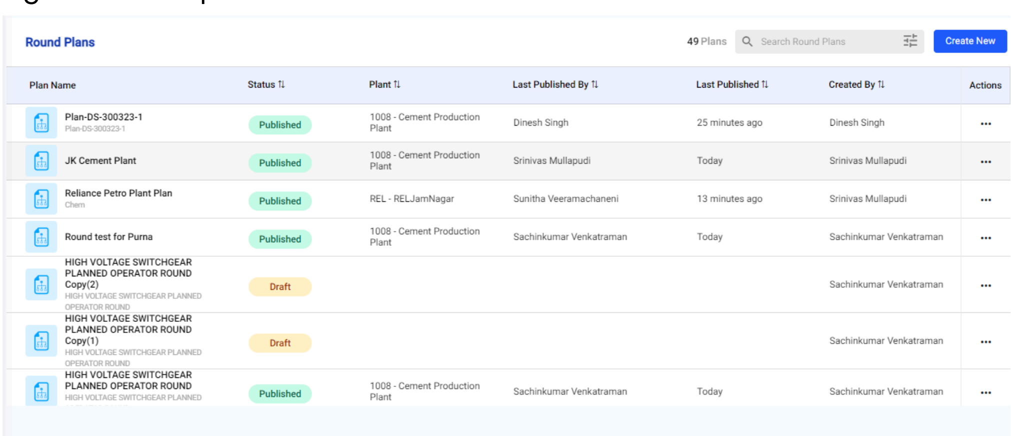
1. Click the **Round Plans** section on the left-side pane.

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

2. Click ••• and select **Copy** for the selected round plan.

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

Figure 6-26 Copied Round



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

   Or

   Double-click the round to open the edit screen.
4. Update or modify the tasks and other details as required and publish. For information, see Modify Round Plans *(on page 126)*.

6.2.5. Modify Round Plans

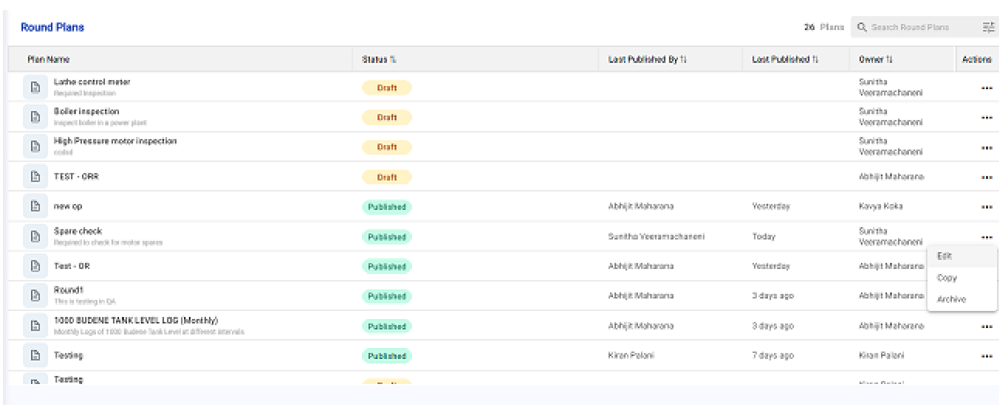
Modifying round plans allows you to update the tasks, schedules, or assigned operators in response to changing priorities or new information.

To edit a round plan:

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

   The Round Plans screen with the list of draft and published round plans is displayed.
2. Click the More ••• icon > Edit for the selected round plan.

   Figure 6-27 Edit Rounds

3. Update the round plan details as required.
4. Use the **Enable Barcode Scanning** option to enforce scanning where needed for a Round Plan
5. Click **Publish** to re-publish the round.

6.2.6. Create an Ad-Hoc Round

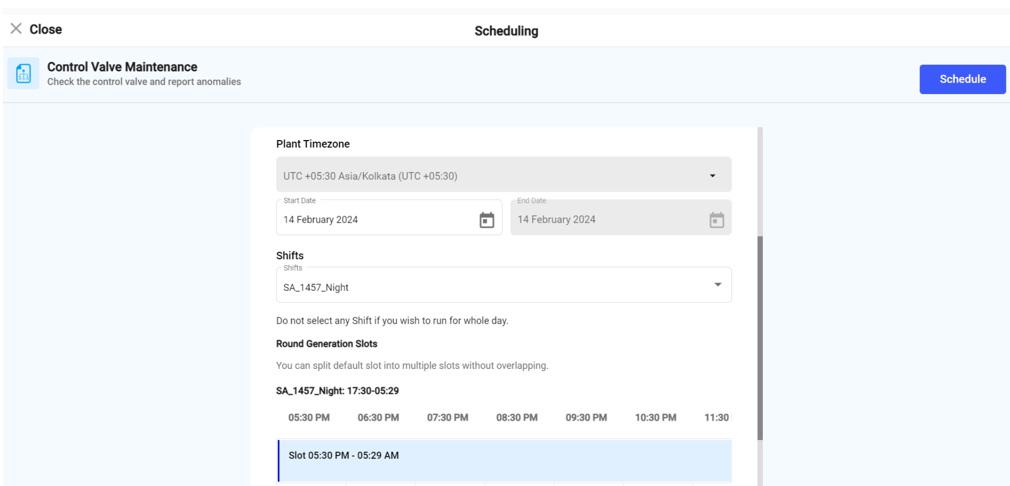
Ad-hoc tasks in mRounds allow supervisors to address urgent or unplanned maintenance activities that are not part of the regular round plans. These tasks can be created on the fly to handle issues that require immediate attention, such as equipment failures or safety concerns. Once created, ad-hoc tasks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

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

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

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

Figure 6-28 Create Ad Hoc Round



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

4. Click **Schedule**.

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

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

6.2.7. Configure Round Plan Details PDF

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

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

- Round/Form Description
- Summary
  - Plant
  - Location / Assets Completed
  - Schedule
  - Shift
  - Due
  - Submitted On
  - Submitted By
  - Round Duration
  - Plant Timezone
  - Attachments.
- Issues Summary
-
  - Issues Raised
  - Issues Resolved.
- Actions Summary
  - Actions Raised
  - Actions Resolved.
- Tasks Summary
  - Open
  - Skipped
  - Completed
  - Total
  - Tasks/Questions Completed By
  - Report Generated On
  - Total Pages.
- Tags for Priorities & Status of Issues & Actions.
- Description, Asset, Location & Priority of Issues & Actions highlighted.

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

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

6.3. Review and Approve Round Plans

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

This topic contains the following sub topics:

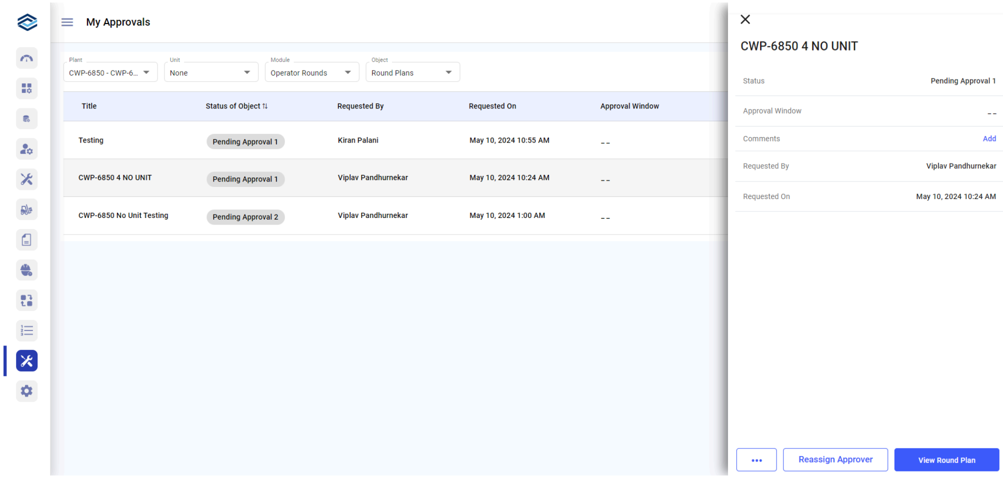
6.3.1. Review and Approve Round Plan to Publish

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

To approve round plan request for publishing:

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

Figure 6-29 Approve Round Plan



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

   Or

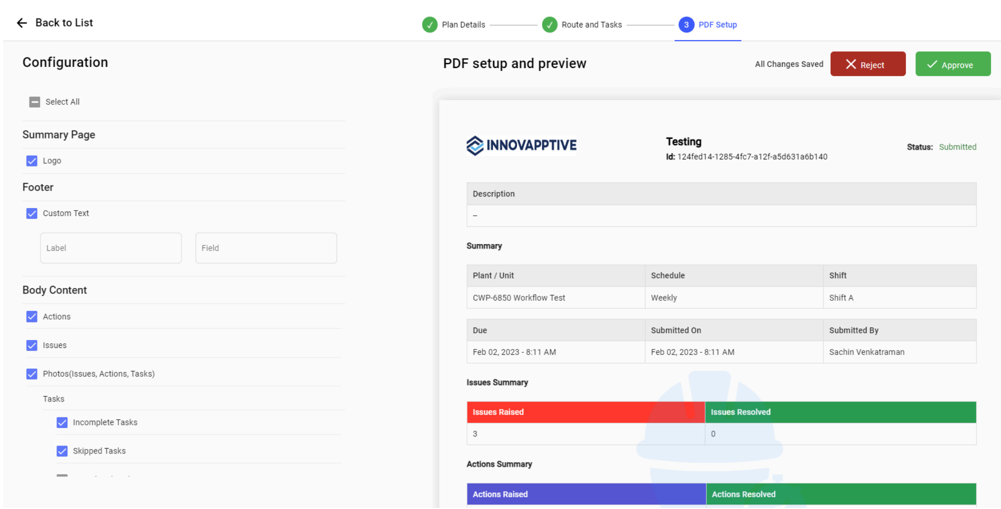
   Click **View Round Plan** to view the round plan details.

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

   Click **Next**.

   Click **Approve**.

Figure 6-30 Approve



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

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

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

6.3.2. Create a Custom Workflow

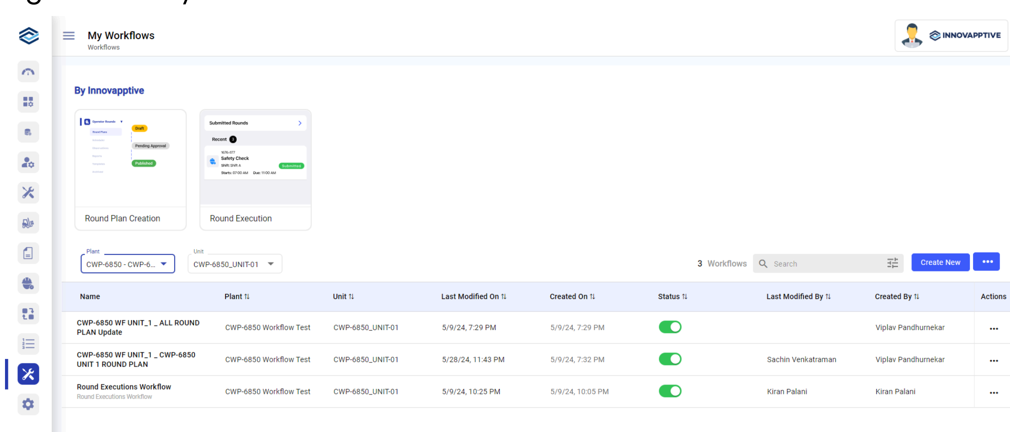
This section allows you to create and configure custom approval workflow for equipment inspections tailored to the specific needs of a plant.

To create a workflow:

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

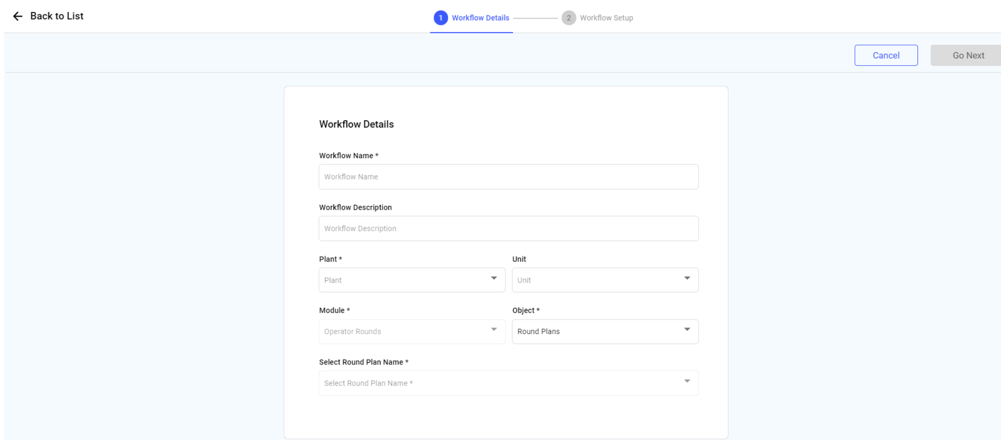
   The list of predefined workflows is displayed.

   Figure 6-31 My Workflows

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

Figure 6-32 Workflow Details Screen



a. Enter the workflow name in the **Workflow Name** field.

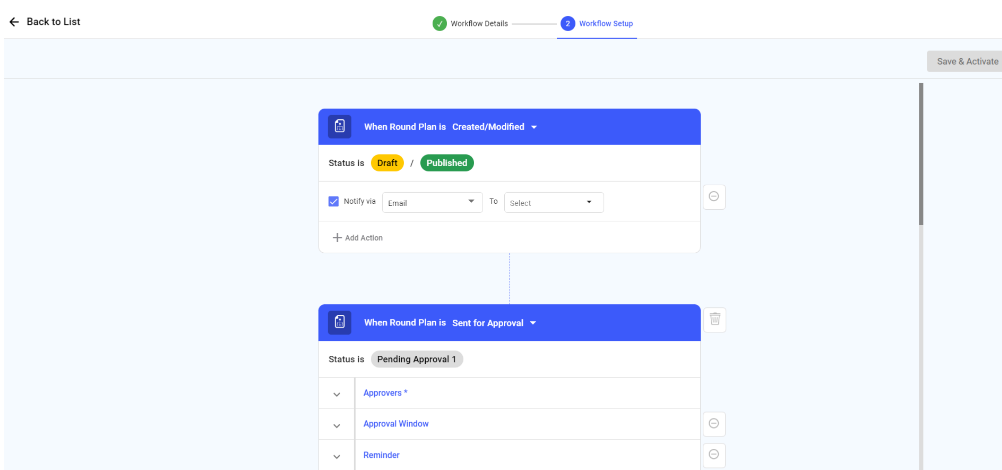
b. Enter the description in the **Workflow Description** field.

c. Select **Plant**, **Unit**, **Module**, and **Object** from the list.

d. Select a round plan from the **Select Round Plan Name** list.

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

Figure 6-33 Workflow Setup Screen



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

   The workflow is created.

6.3.3. Maintain Approval Audit Trail

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

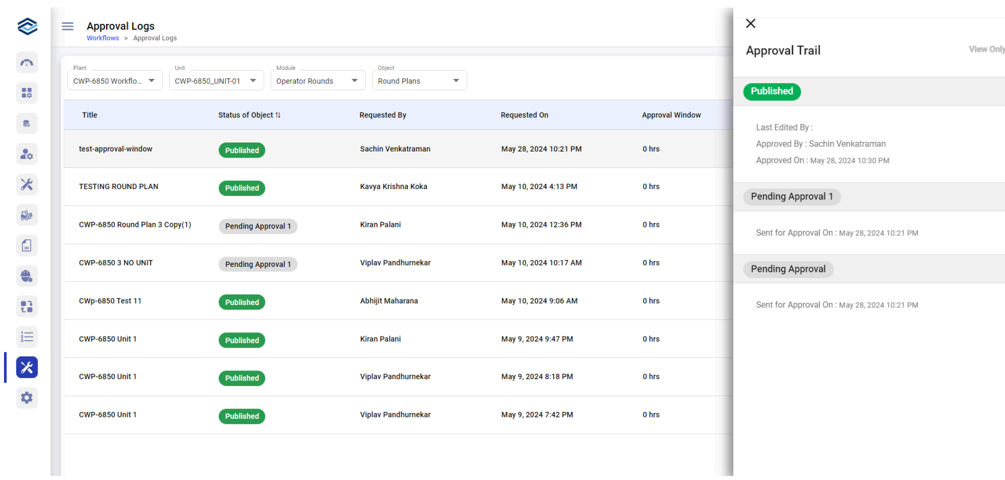
To view the approval logs:

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

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

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

   Figure 6-34 Approval Logs Screen

6.4. Schedule Round Plans

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

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

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

Published round has the following status:

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

6.4.1. Schedule Round Plans by Frequency

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

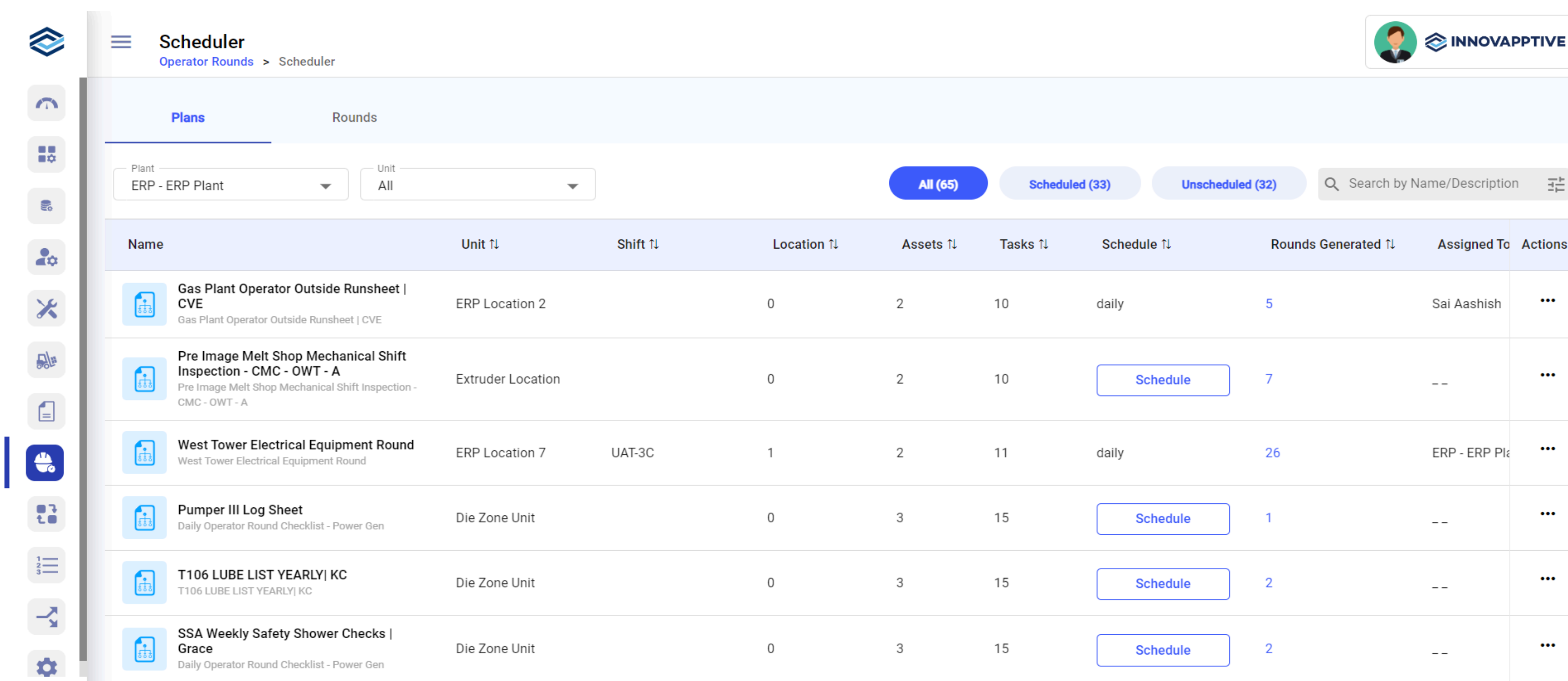
To schedule rounds by frequency:

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

   Or

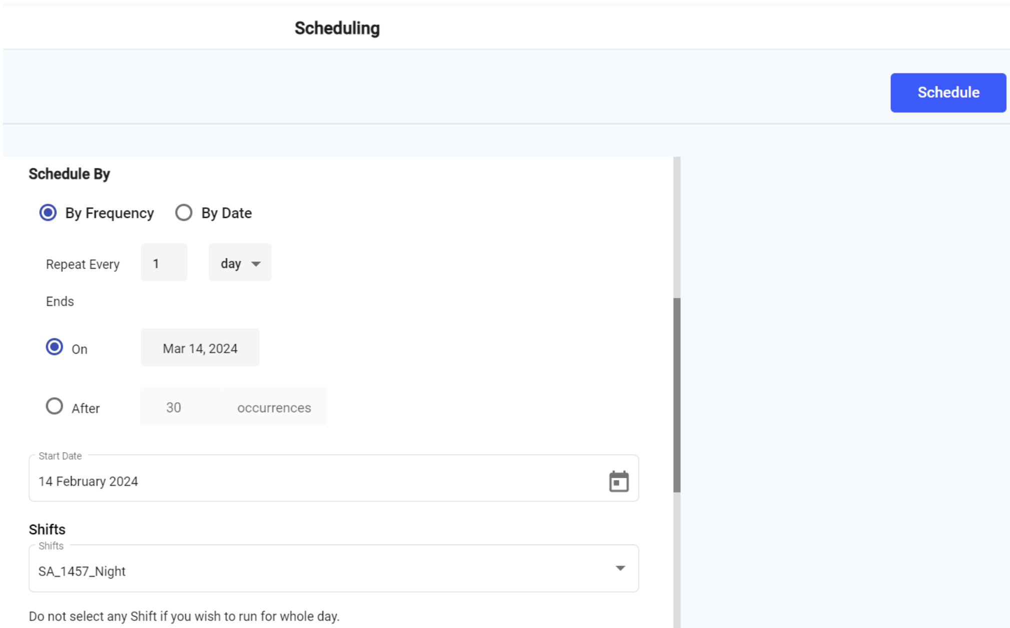
   Click ••• and select **Schedule** > **Header Level** for the selected round plan that you want to schedule.

   Figure 6-35 Schedule Rounds Screen



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

Figure 6-36 Schedule Rounds by Frequency



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

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

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

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

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

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

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

9. Select slots for the selected shift.

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

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

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

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

    Or

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

    Or

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

Or

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

Or

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

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

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

14. Click **Schedule**.

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

6.4.2. Schedule Round Plans by Specific Date

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

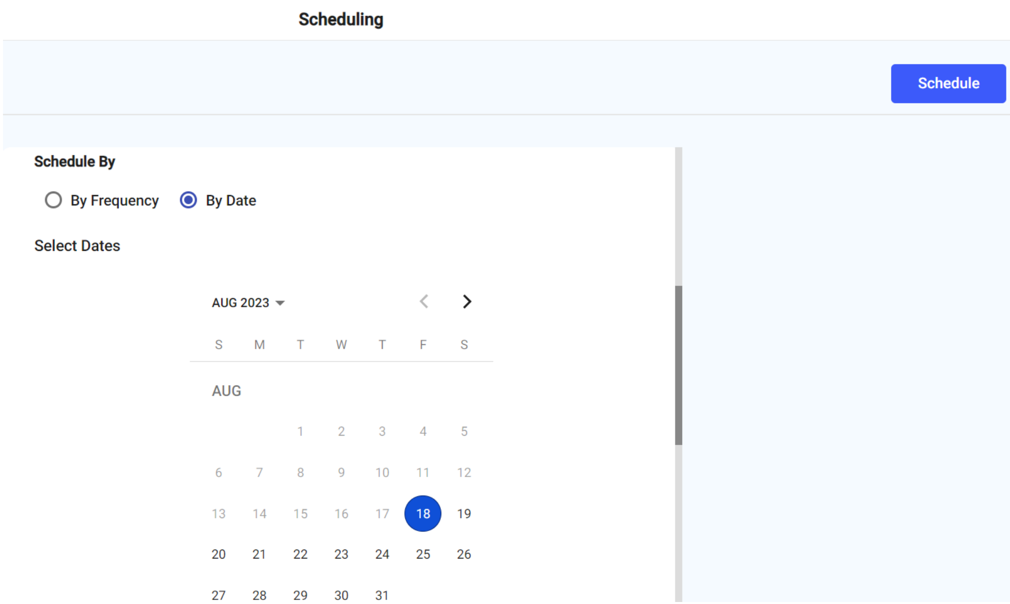
To schedule rounds by date:

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

   Or

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

   Figure 6-37 Schedule Rounds by Date

4. Select the date from the calendar.
5. In the **Shifts** drop-down, select the relevant shift.
6. Select slots for the selected shift.
7. Select the **Allow Buffer Time** check box to add buffer time for round execution.
   a. Select and enter the buffer time to the planned start time.
   b. Select and enter the buffer time to the planned end time.

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

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

Or

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

Or

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

Or

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

Or

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

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

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

6.4.3. Schedule Rounds at Task Level

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

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

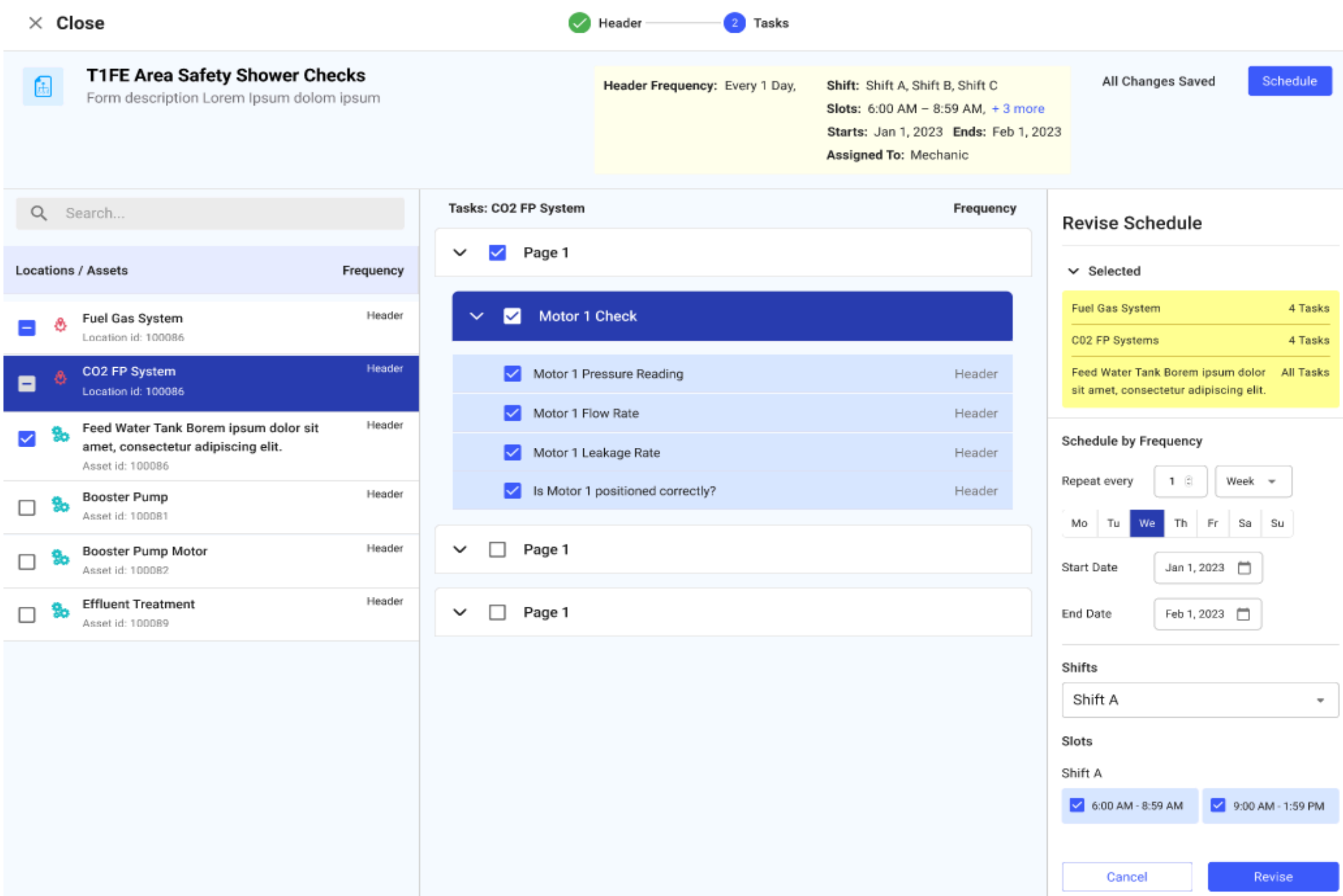
To schedule a round at task level:

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

   Or

   Click ••• adjacent to the round plan that you want to schedule and select **Schedule** > **Task Level**.
3. In the **Header** screen, fill the details. For more information, see Schedule Round Plans by Frequency *(on page 134)* and Schedule Round Plans by Specific Date *(on page 137)*.
4. Click **Next** on top right.
5. In the **Tasks** screen,
   a. Select the location or asset in the **Locations / Assets** section on the left side.
   b. Select the tasks or whole section in the middle section.
   c. Fill the details in the **Revise Schedule** section on the right side.
   d. Click **Revise**.

Figure 6-38 Scheduling at Task Level



A message "Schedule Revised Successfully" appears.

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

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

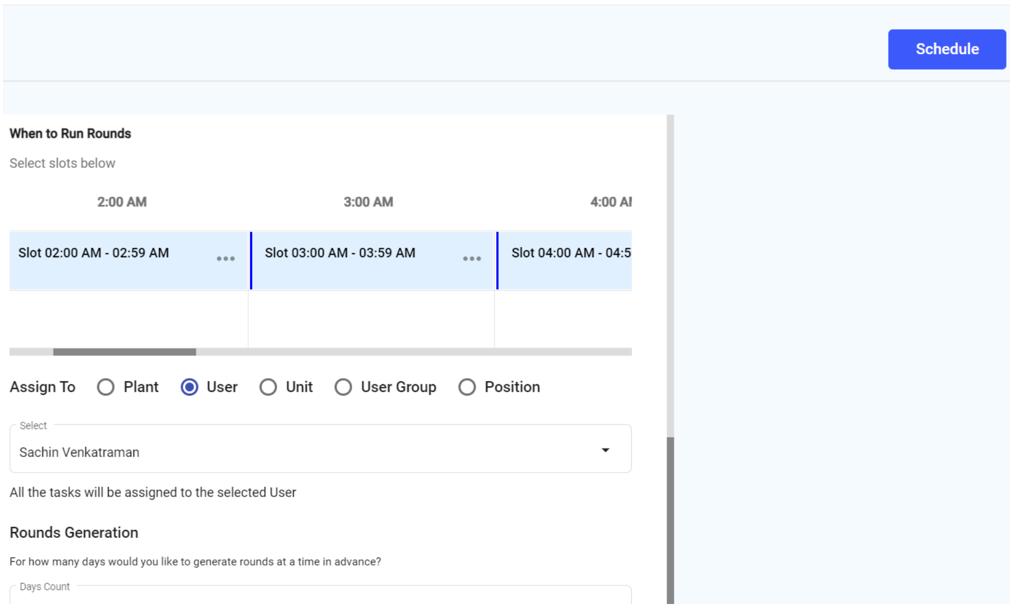
6.4.4. Modify Scheduled Round Plans

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

To modify the schedule of a round:

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

Figure 6-39 Modify Schedule



7. View Round Plans and Submitted Rounds

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

This topic contains the following sub topics,

- View Round Plans and Plan Details *(on page 143)*
- View Submitted Rounds *(on page 144)*

7.1. View Round Plans and Plan Details

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

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

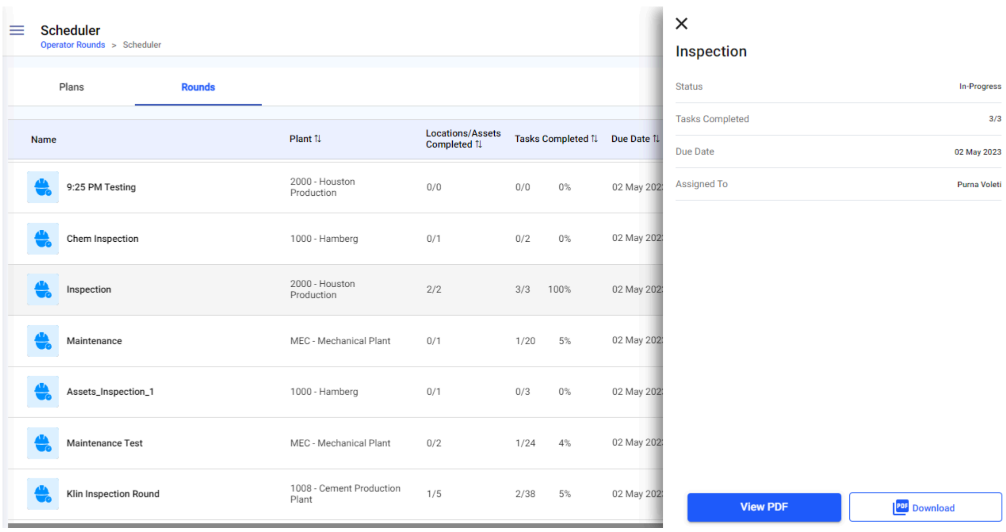
To view round plans list and round plan details:

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

4. Click *** and select **Show Details** for the scheduled round to view.
   You can view the round details on the right side. Click **View PDF** to view the details in PDF or click **Download** to download the details in PDF format. You can also click the links inside the PDF to view and download the attachments like videos, audio, and documents. For more information, see Configure Round Plan Details PDF *(on page 128)*.

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

Figure 7-1 View Round Details



7.2. View Submitted Rounds

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

Scheduled rounds have the following status:

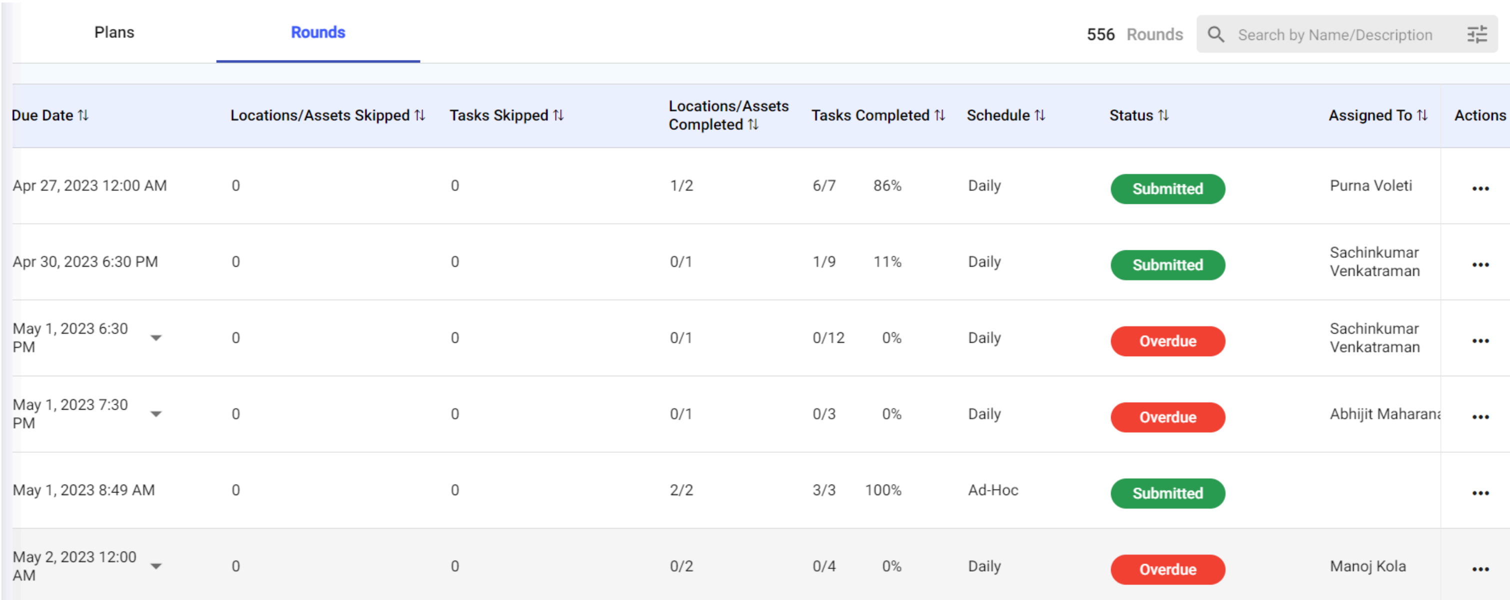
- **Open**: Round is scheduled but not assigned to an operator or round is assigned to the operator but the operator unassigned it without any progress.
- **Assigned**: Round is scheduled and assigned to an operator, but the Operator has not started the task yet.
- **In Progress**: Operator started the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

To view the status of rounds:

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

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

Figure 7-2 Scheduled Rounds



Plans | Rounds | 556 Rounds | Search by Name/Description

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

4. Select the round to view the summary on the right.

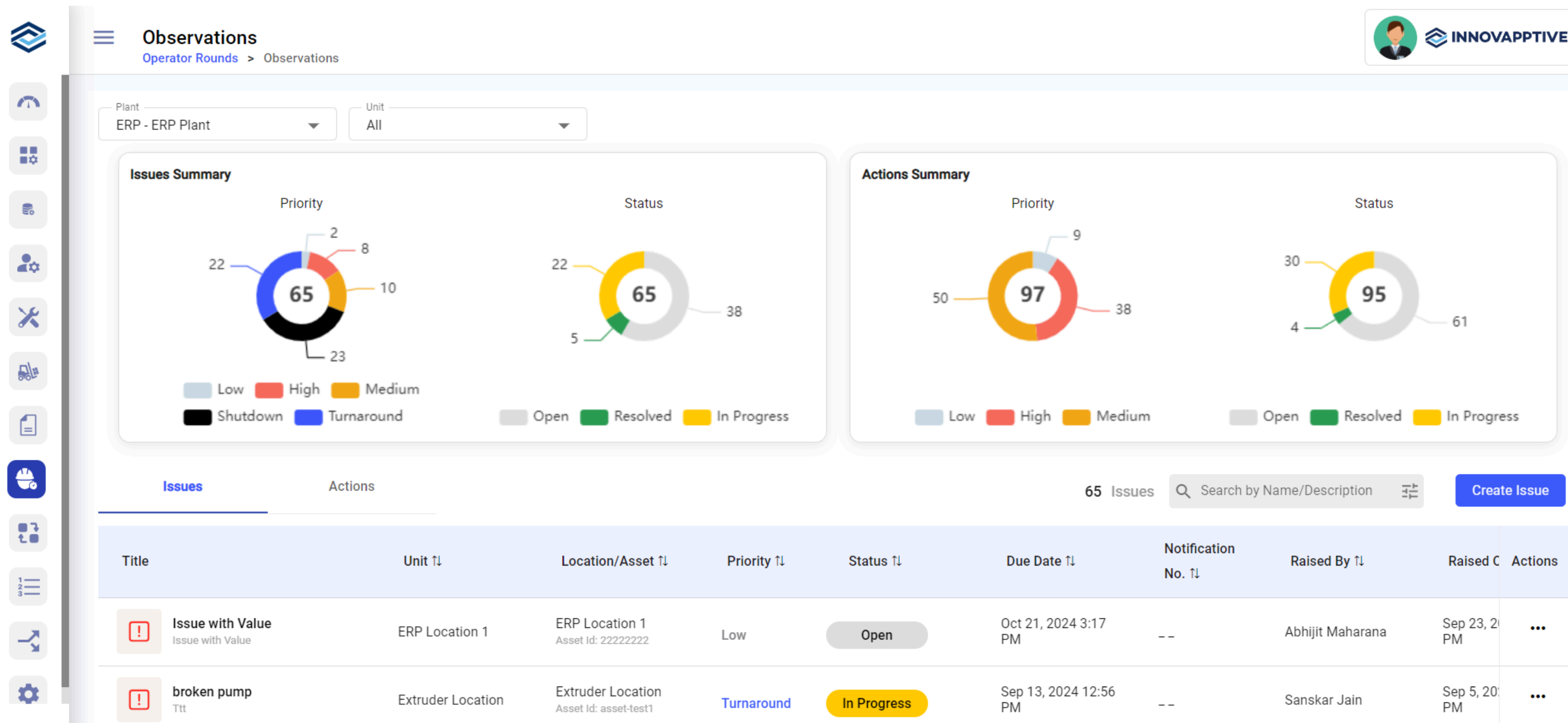
   You can view the round details such as Summary, Observations, Notes, and Tasks. Click Download as PDF to download the details in PDF format.

> **Note:**
> You can view automatically captured task locations on a map, see if they fall within predefined geofences, and check geo-compliance scores. This helps ensure accurate tracking, proper verification, and fewer location-related errors.

8. Create and Manage Issues

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

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



8.1. Configure an Issue

The Issue Configuration feature allows you to tailor issue capture to your plant's specific needs while ensuring seamless integration with SAP for notification creation across locations. Administrators can define:

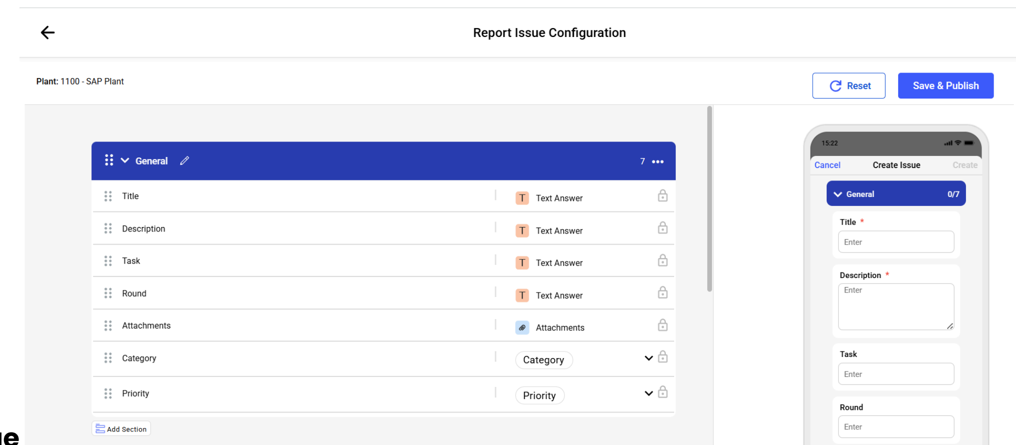
- **Custom fields** to capture plant-specific data
- **Default values** to standardize entries
- **Help texts** to guide end users
- **Auto-fill conditions** to speed up data entry and reduce errors.

This ensures accurate, consistent, and efficient issue reporting across your operations.

To configure an issue:

1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
3. Click **Configure Issue**.
4. In the **General** section, customize, Issue Title, Description, Photos, Priority, Category fields.

Configure an Issue



5. In the **More Details** section, adjust Plant, Unit, Location, Asset, Assignee, Due Date and Time, New Custom Field and Status fields.

   Add additional fields by clicking **Add Field**.

   Create new sections by clicking **Add Section**.

   Add or remove columns except for mandatory fields like Title, Unit (if enabled), Location/Asset, Priority, Status, Due Date, Assigned To.

    - New fields added during configuration appear as selection criteria in column configuration.
    - Default configuration applies to newly created plants. You need to modify configurations to meet specific business needs.
    - You can Copy configurations from one plant to another.
    - When modifying one plant's configuration, you will be prompted to apply changes to all plants.
6. Click **Save & Publish**.

   The right side of the screen displays a mobile preview of the "Create Issue" form, allowing you to verify the layout and functionality before publishing.

8.2. Create an Issue

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

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

To create an issue:

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

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

    e. Add images in the **Photos** field.

Photos taken or uploaded are automatically stamped with the time and location, helping verify when and where each image was captured.

f. Select the **Plant**, **Unit**, **Functional Location**, and **Asset** values from the respective dropdowns.
g. In the **Assigned To** to drop-down,
   - Choose **User** and select the user from the drop-down.
   - or
   - Choose **User Group** and select the user group from the drop-down.
h. Select **Start Date** and **Time**.
i. Select **Due Date** and **Time**.
j. Select the **Status** as **Open**, **In-Progress**, **Resolved**, or **Un Resolved**.

5. Enable **Convert to ERP Notification** toggle if you want to convert the issue to notification.
6. Click **Create**.

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

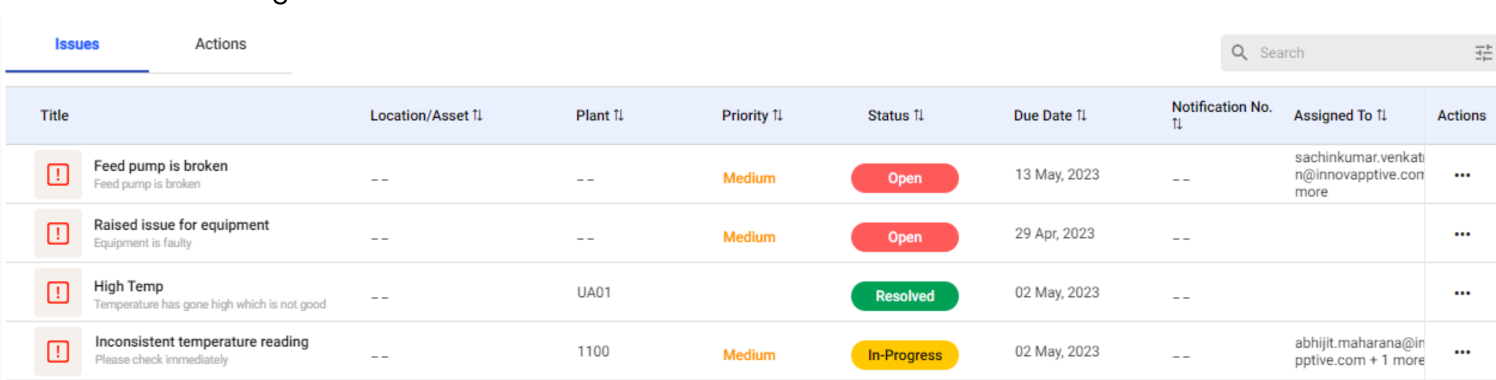
8.3. Track Ongoing Issues

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

To track issues:

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

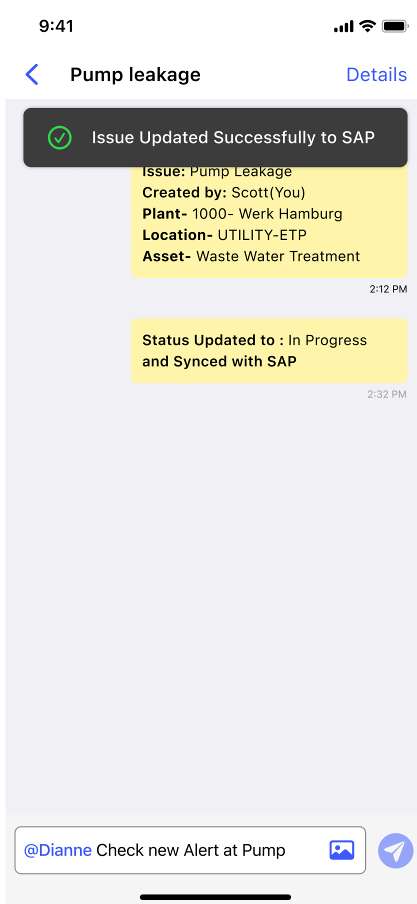
Figure 8-1 View Issues



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

You can track the real-time status of your SAP notifications directly from the mRounds web and mobile applications. This integration provides instant visibility into equipment issue statuses without requiring separate access to the SAP or mWorkOrder applications.

Figure 8-2 SAP Notification



- When you submit a notification in **mRounds**, it is automatically updated in **SAP** or **mWorkOrder** as NEW.
- When a notification status is updated in **SAP** or **mWorkOrder** to **In Progress**, the changes are instantly reflected in **mRounds**.

This ensures that Supervisors and Operators can check the latest status in mRounds at any time without switching between applications and reduce delays.

3. Click ••• and select **Show Details** of the selected issue.
   You can view the detailed information in the Log History screen such as live updates, priority, status, and so on.

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

8.4. Update and Close an Issue

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

To update and close issues:

1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
   You can view the list of issues.
3. Click ••• and select **Show Details** of the selected issue.
4. In the **Log History** screen, add any new insights from the operator's report.
5. Update the **Status** to **In Progress** based on current steps.

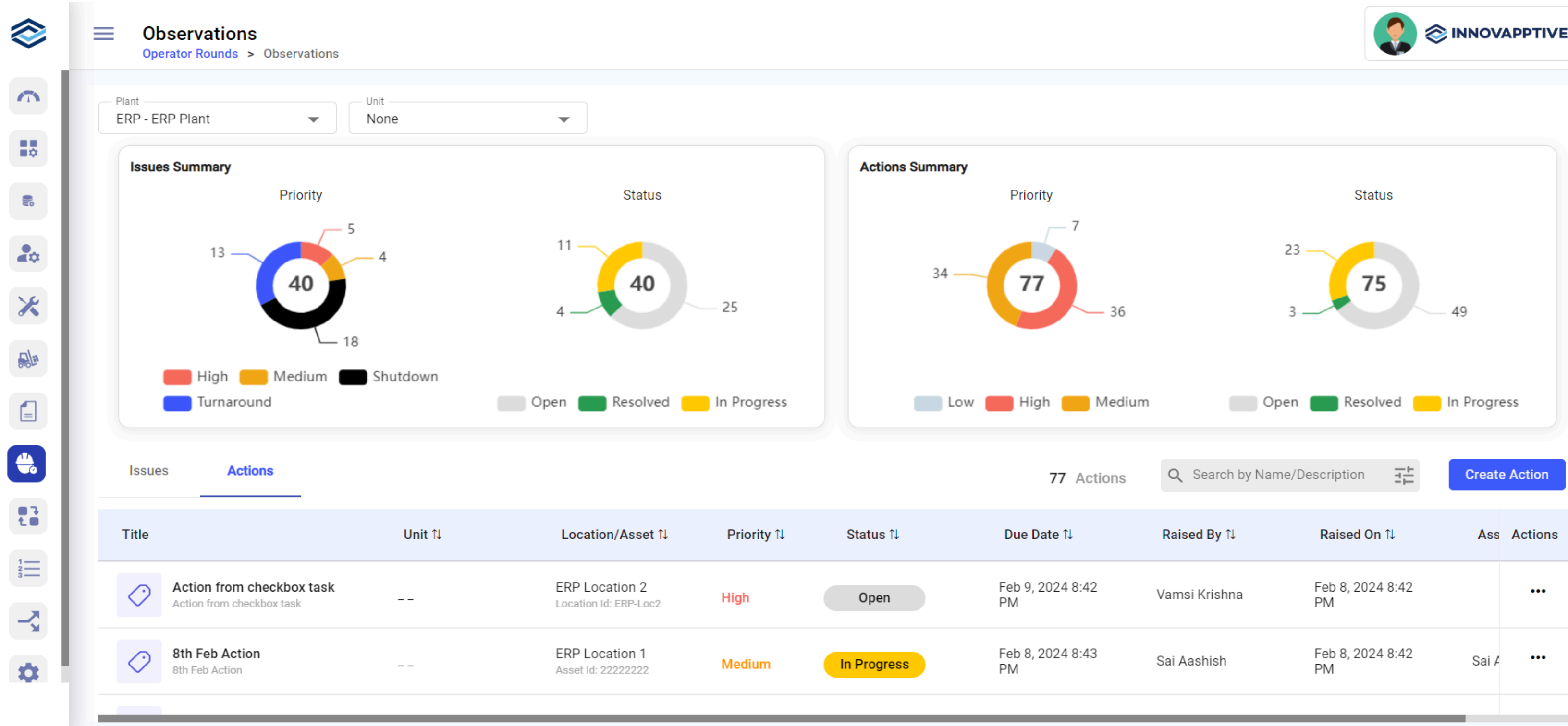
   Or

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

9. Create and Manage Actions

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

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



9.1. Create an Action

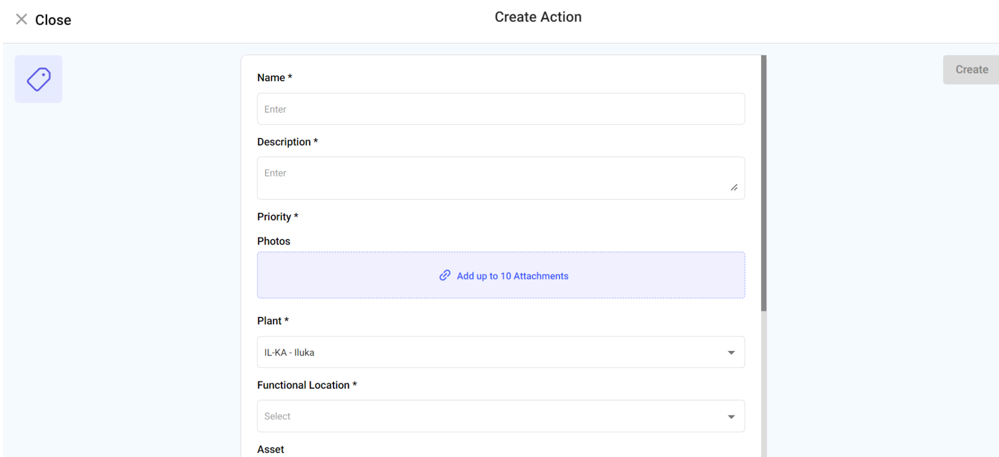
You can create actions to initiate follow-up tasks based on the results of a round or inspection from the web application.

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

To create an action:

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

Figure 9-1 Create Action



4. In the **Create Action** screen, do the following,
   a. Enter the action title in the **Name** field.
   b. Enter the action description in the **Description** field.
   c. Select the **Priority** as **High**, **Medium**, or **Low**.
   d. Add images in the **Photos** field.
   e. Select the **Plant**, **Unit**, **Functional Location**, and **Asset** values from the respective dropdowns.
   f. In the **Assigned To** to drop-down,
      - Choose **User** and select the user from the drop-down.

        or

      - Choose **User Group** and select the user group from the drop-down.
   g. Select **Due Date** and **Time**.
   h. Select the **Status** as **Open**, **In-Progress**, **Resolved**, or **Un Resolved**.
5. Click **Create**.

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

9.2. Monitor Actions

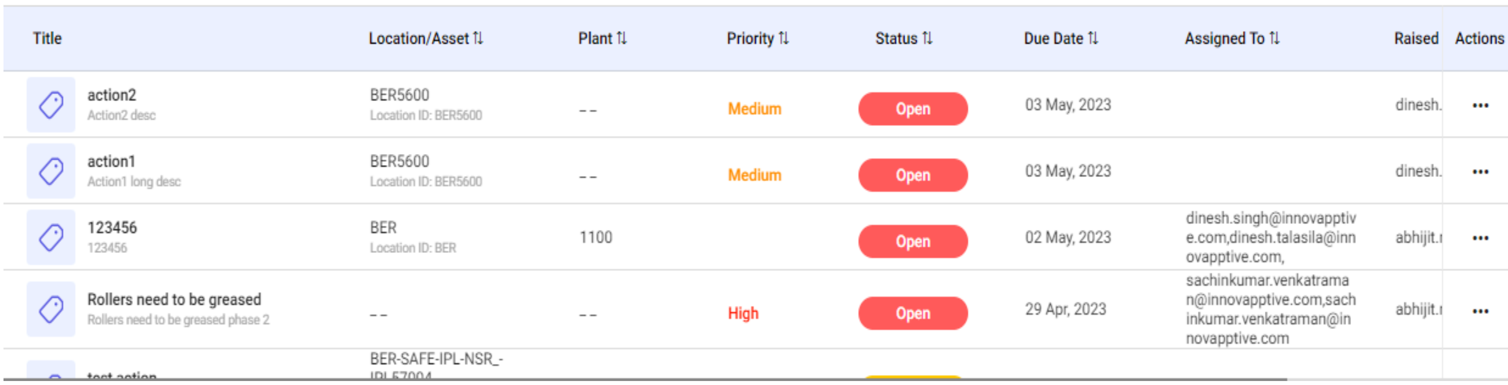
The Actions tab displays follow-up actions raised by the Operators.

To view open actions:

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

   You can view the list of actions.

   Figure 9-2 View Actions



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

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

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

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

9.3. Update and Close an Action

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

To close actions:

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

   You can view the list of actions.
3. Click ••• and select **Show Details** of the selected action to see the details.

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

   Or

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

10. Create ERP Notification for an Asset

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

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

To create a notification for an asset:

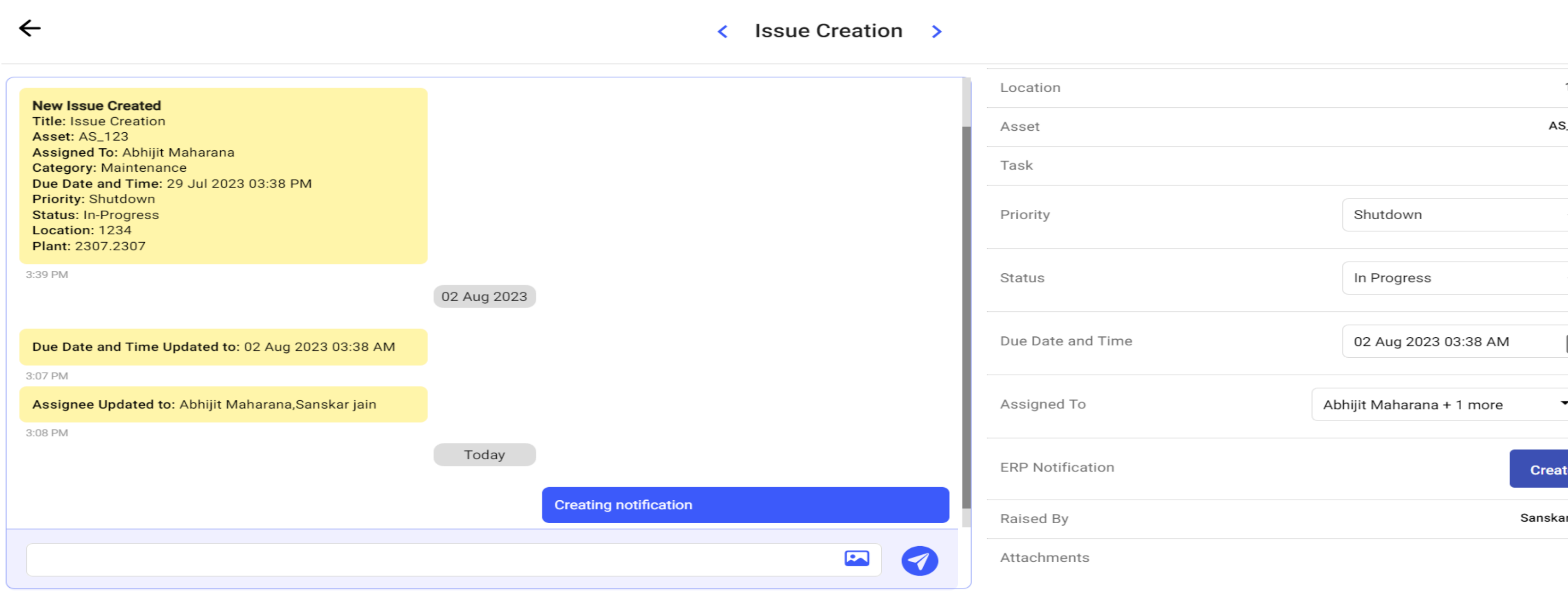
1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
3. Click ••• and select **Show Details** of the selected issue.

   or

   Double-click the issue to open.

   The log history window is displayed.

   Figure 10-1 Create a Notification



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

   An alert pop-up with following options is displayed:

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

The notification is created in the back-end with the notification number.

11. Generate Shift Handover Report

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

This section has the following topics:

11.1. Overview of Shift Handover Reports

The **Shift Handover Report** ensures smooth and informed transitions between shifts. It is generated by the **Outgoing Shift Supervisor or Operator** and handed over to the **Incoming Shift Supervisor or Operator**, depending on the organization’s hierarchy.

The report provides a summary of completed tasks, pending work, raised issues, and any unresolved exceptions. Reviewing this report helps the incoming shift team stay updated on priority actions and ongoing concerns.

Key Sections in the Shift Handover Report

Summary

Gives an at-a-glance view of rounds, tasks, issues, actions, exceptions, and logs from the shift. If a task value exceeded the defined range, it’s listed as an exception. Clicking **View** next to an exception opens the last five readings for review.

- **Trends**

  Shows overall shift performance using visual widgets. It includes counts for rounds, tasks, issues, and actions, as well as exceptions and any notes or logs added during the shift.

- **Instructions**

  Displays supervisor notes and standing instructions meant for the incoming shift. This section may also include attachments like images or PDFs for added clarity.

- **Shift Information**

  Captures details such as the plant, unit, current and upcoming shift, and names of the outgoing and incoming shift supervisors.

Logs

Lists shift logs added by operators while performing rounds or tasks. Logs are grouped by position and can be edited or deleted if required.

Rounds

Displays the list of rounds associated with the shift. Filters are available to view rounds by status: All, Overdue, Submitted, Skipped, Open, In Progress, or Completed.

Observations

Shows all exceptions, issues, and actions identified during the shift. You can view the last five readings for each exception using the **View** link.

Notes

Lists any notes added by the operator during the shift or while executing tasks. Notes can be edited or removed based on permissions.

Operators

Displays the list of operators involved in the shift along with their names, positions, number of submitted rounds, and user group.

11.1.1. Configure What Appears in the Report

To show or hide specific sections in the Shift Handover Report:

1. Click the **More icon** on the top-right corner of the Shift Handover screen.
2. Select **Handover Report Configuration**.
3. Check or uncheck the sections you want to include or exclude.
4. Click **Done** to apply the changes.

11.2. Generate and Handover Shift Handover Report

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

To generate shift handover report:

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

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

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

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

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

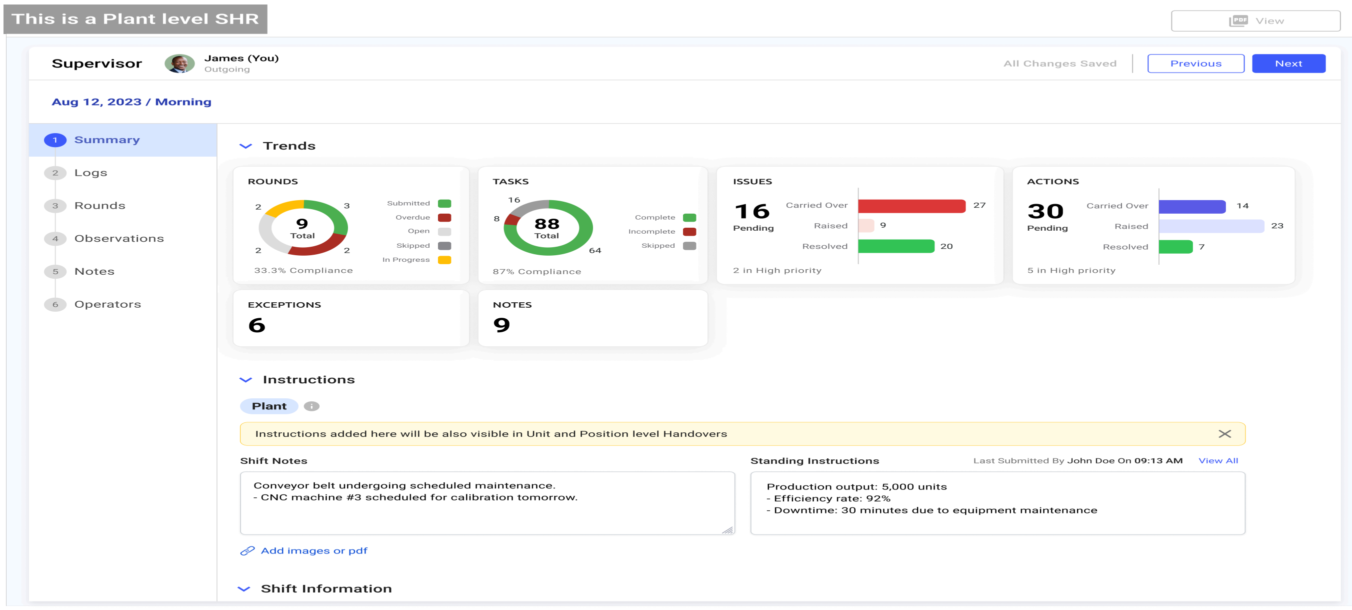
For more information on the above tabs, see Overview of Shift Handover Reports *(on page 159)*.

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

    > **Note:**
    > Shift notes and standing instructions created at the plant level now automatically propagate to both unit and position levels. This update ensures seamless information flow across all operational areas without requiring duplicate data entry.
    > - **Plant Level Entry**: Notes and instructions entered once at the plant level instantly become visible throughout all connected units and positions.
    > - **Unit and Position View**: Personnel assigned to specific units or positions will immediately see relevant plant-level communications in their respective dashboards.

    c. Click **Next**.

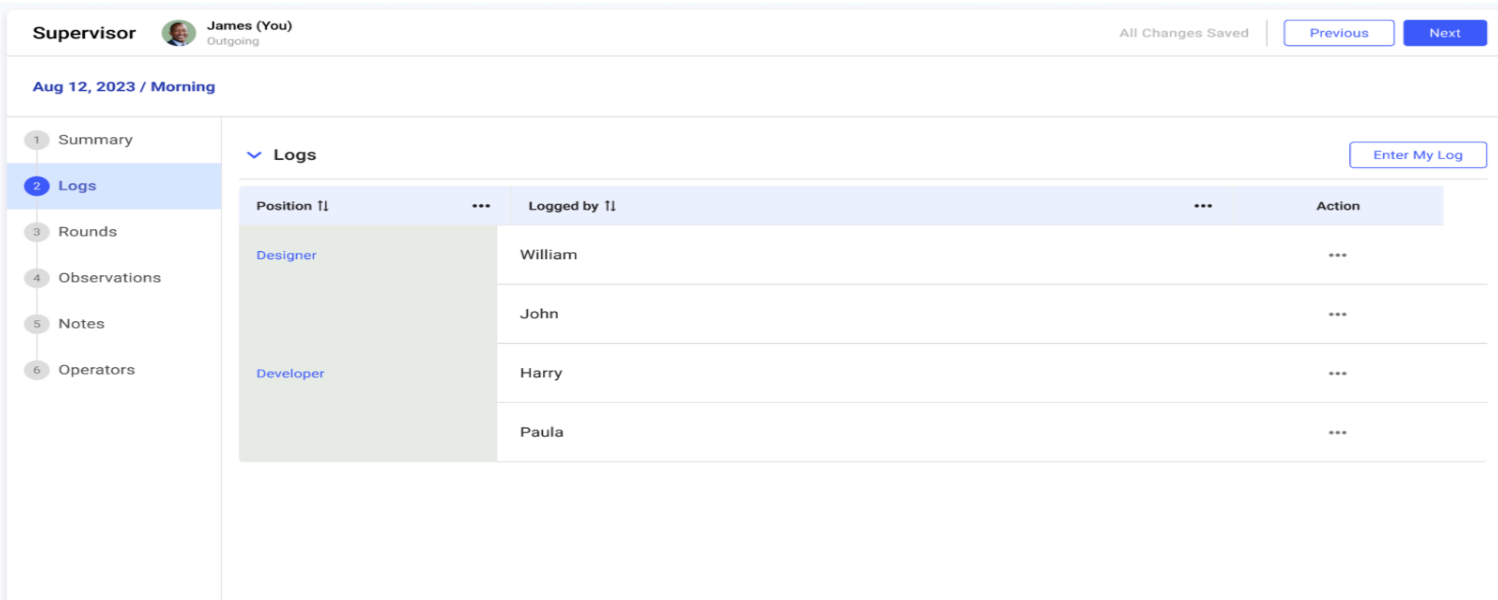
Figure 11-1 SHR Summary



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

       The shift log template is displayed. For more information, see Create Shift Log Template *(on page 166)*.
    b. Fill the log details in the template.
    c. Click **Add Custom Log** to add custom logs.
    d. Click **Save**.
    e. The log is saved.

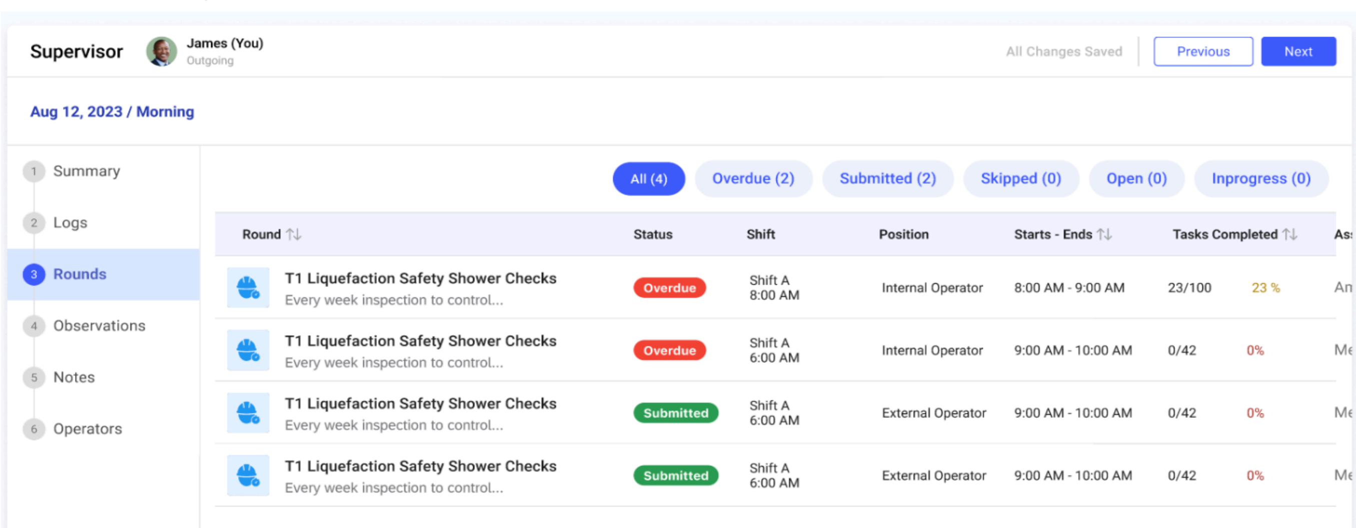
Figure 11-2 SHR Logs



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

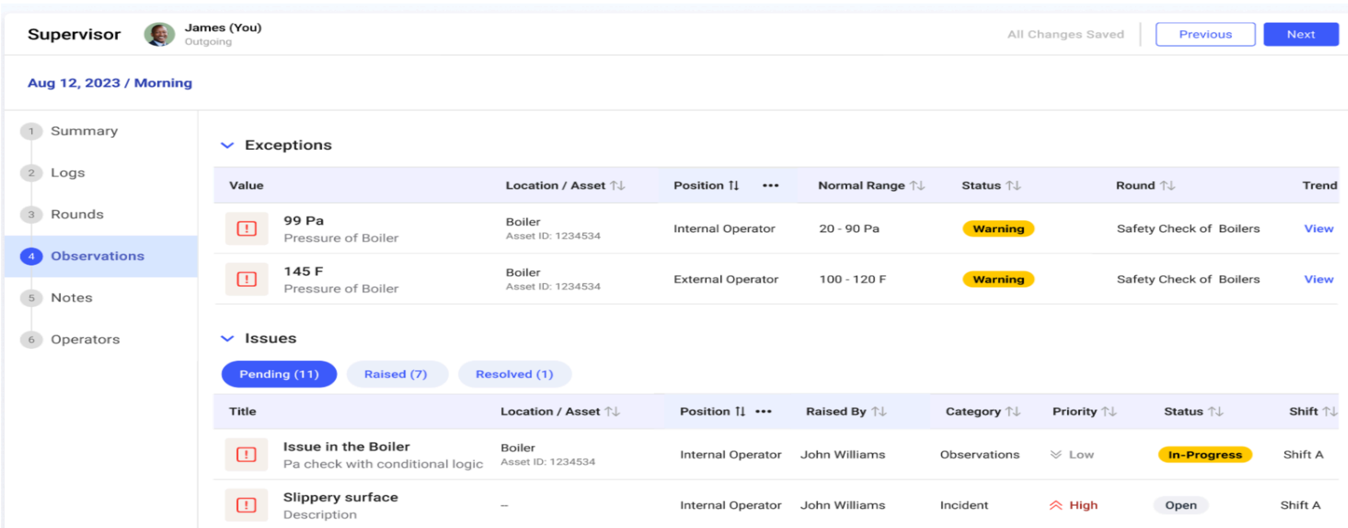
5. In the **Rounds** tab, view the progress of rounds and click **Next** on top right.

Figure 11-3 SHR Rounds



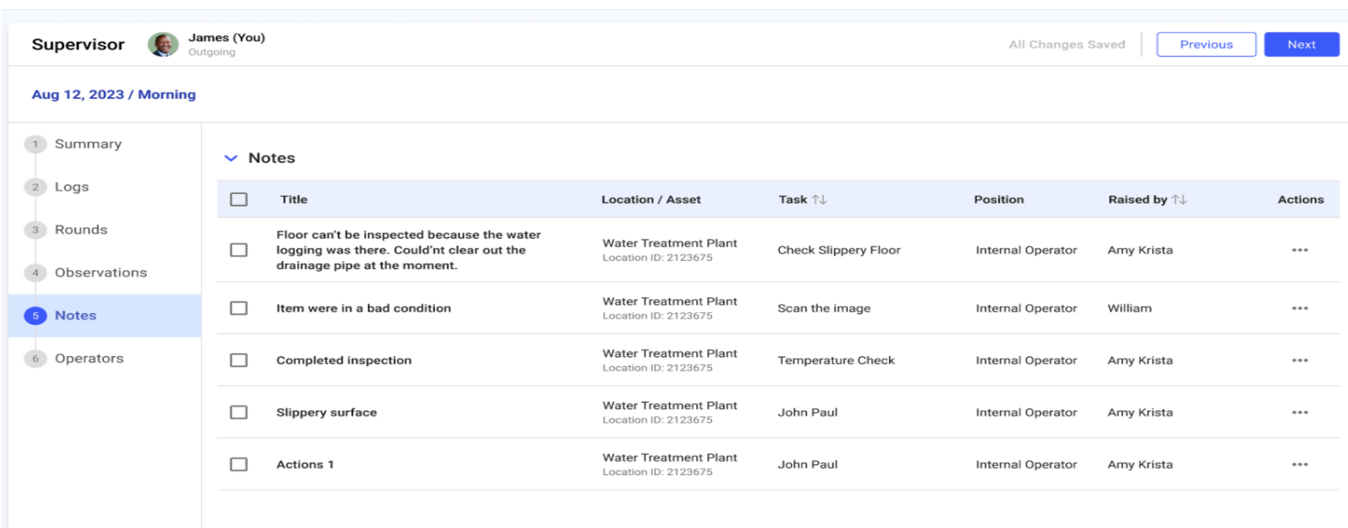
6. In the **Observations** tab, check unresolved issues, exceptions, scan overrides, issues, and actions details and click **Next**.

Figure 11-4 SHR Observations



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

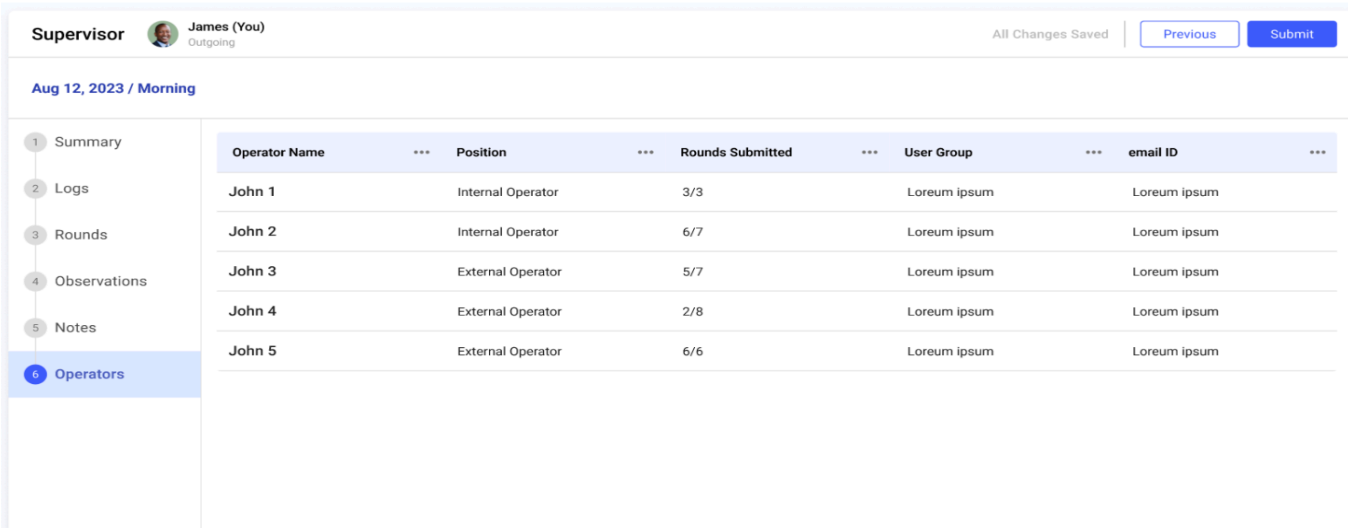
Figure 11-5 SHR Notes



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

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

Figure 11-6 SHR Operators



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

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

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

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

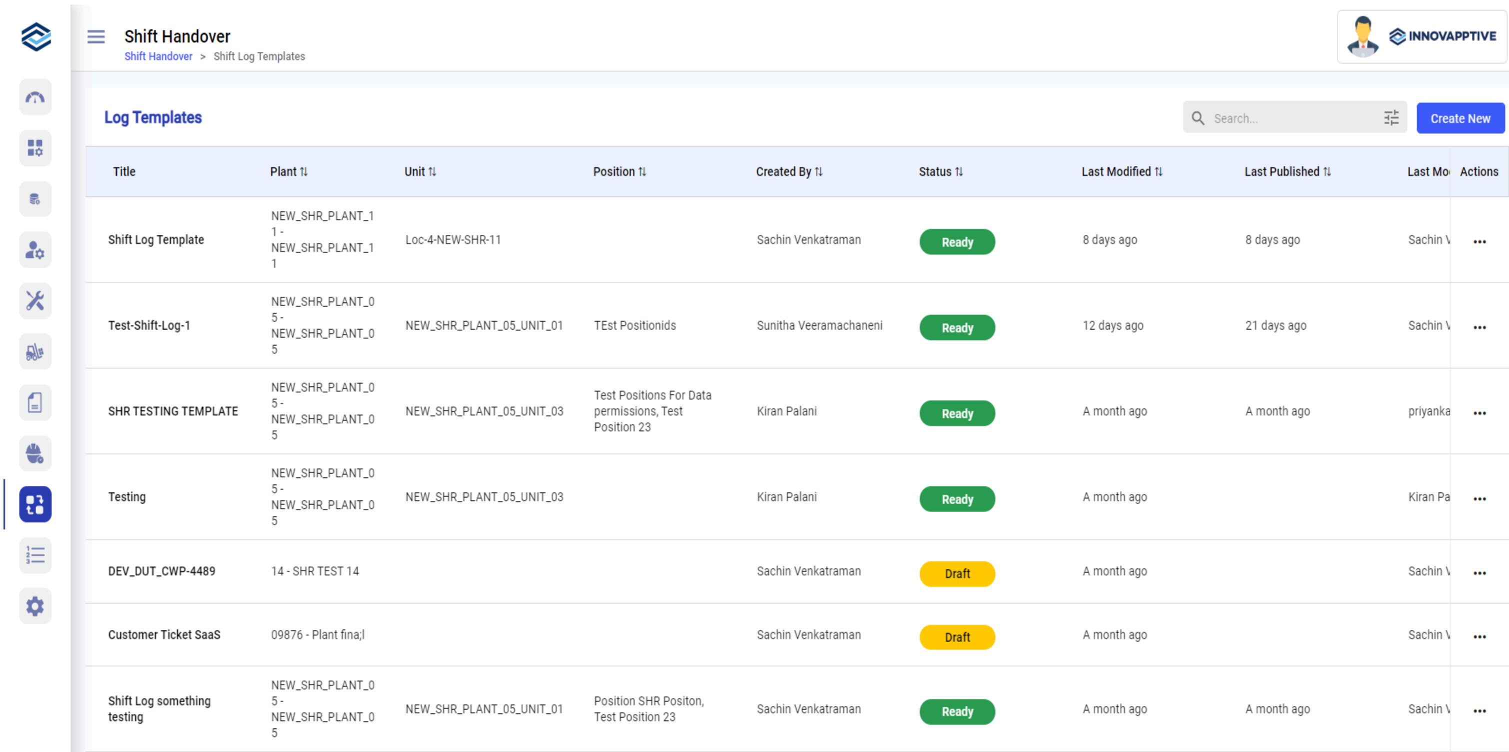
11.3. Create Shift Log Template

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

To create a shift log template:

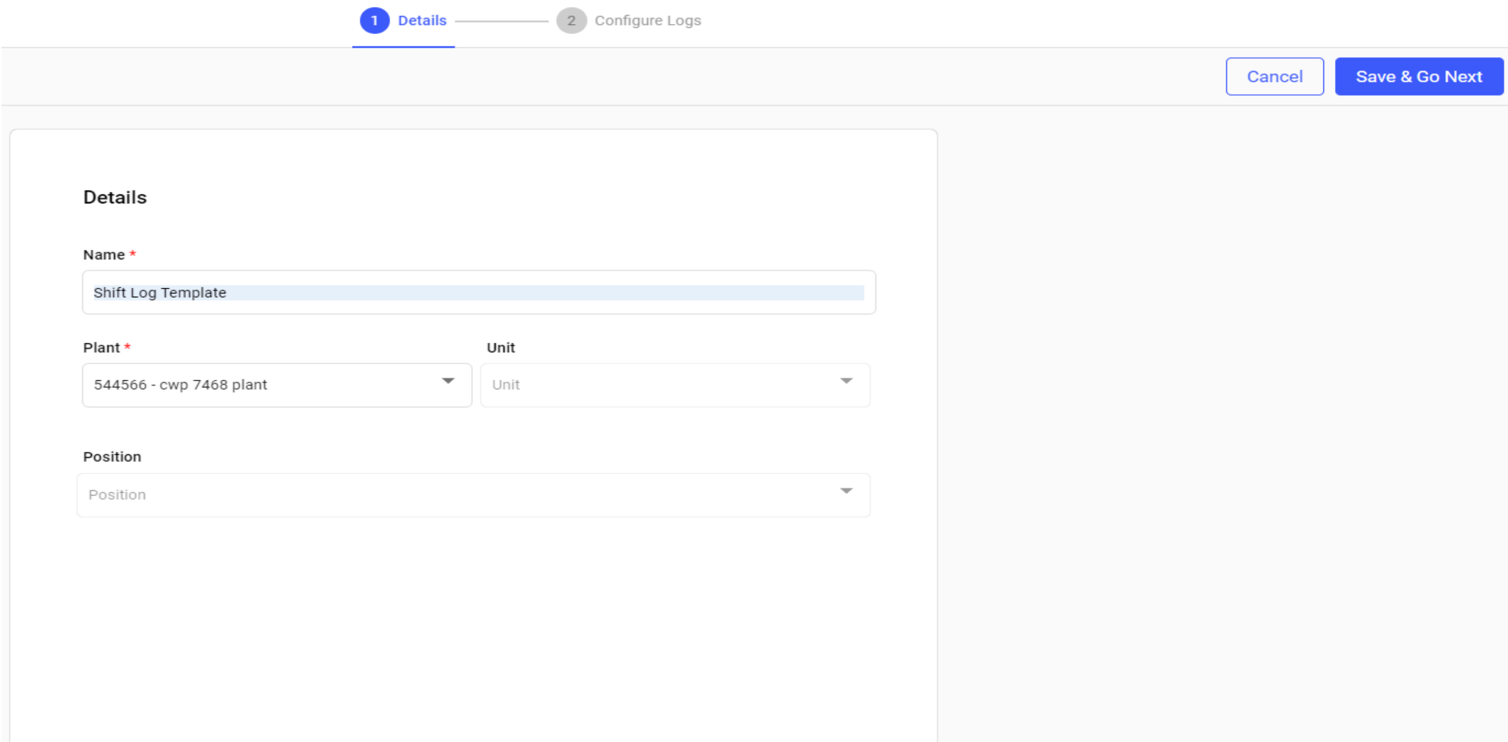
1. Expand **Shift Handover** and click **Shift Log Templates**.
   List of shift log templates are displayed in the Log Templates screen.

Figure 11-7 Log Templates Screen



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

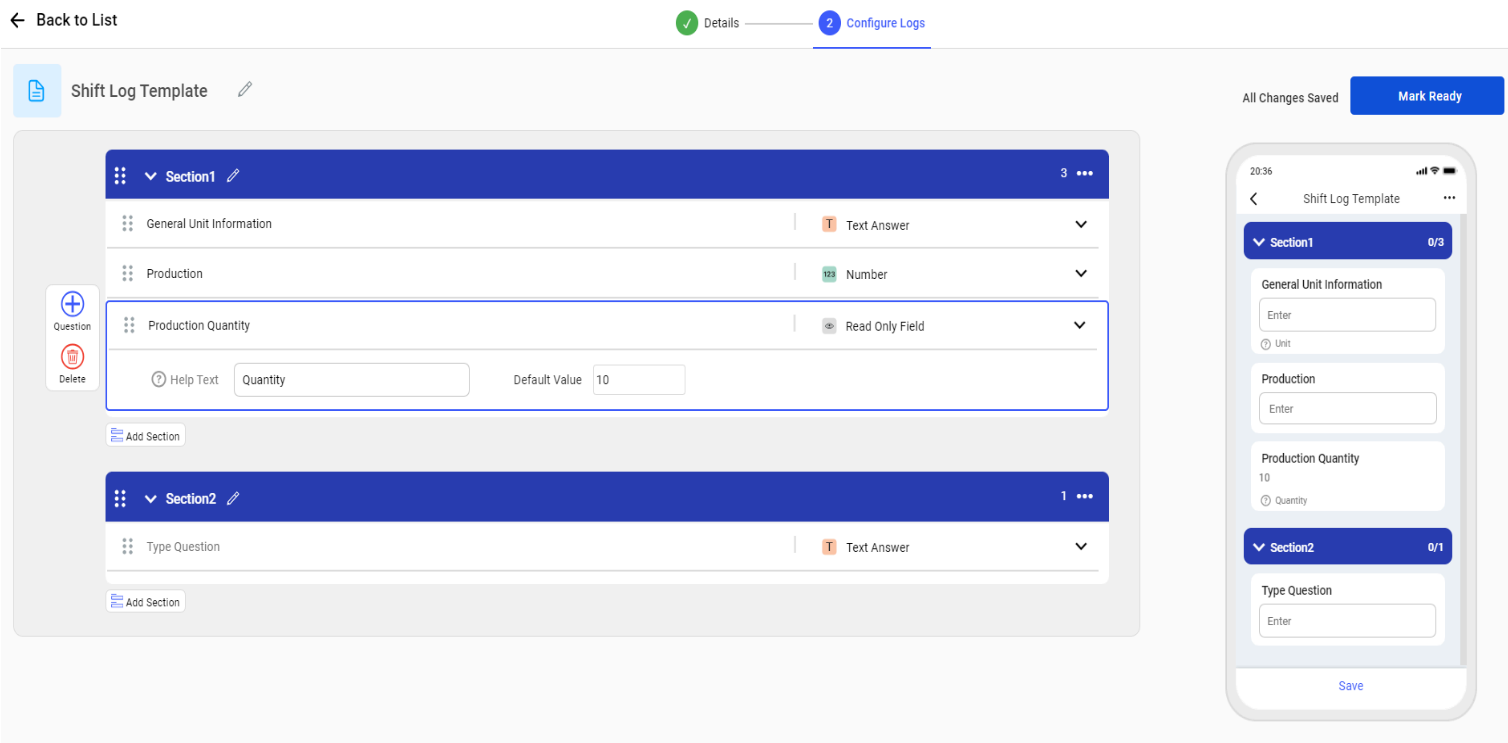
Figure 11-8 Details Screen



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

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

Figure 11-9 Configure Logs Screen



5. Click **Mark Ready**.

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

   Click ••• and select **Edit** next to the template to edit the template.

   Click ••• and select **Delete** next to the template to delete the template.

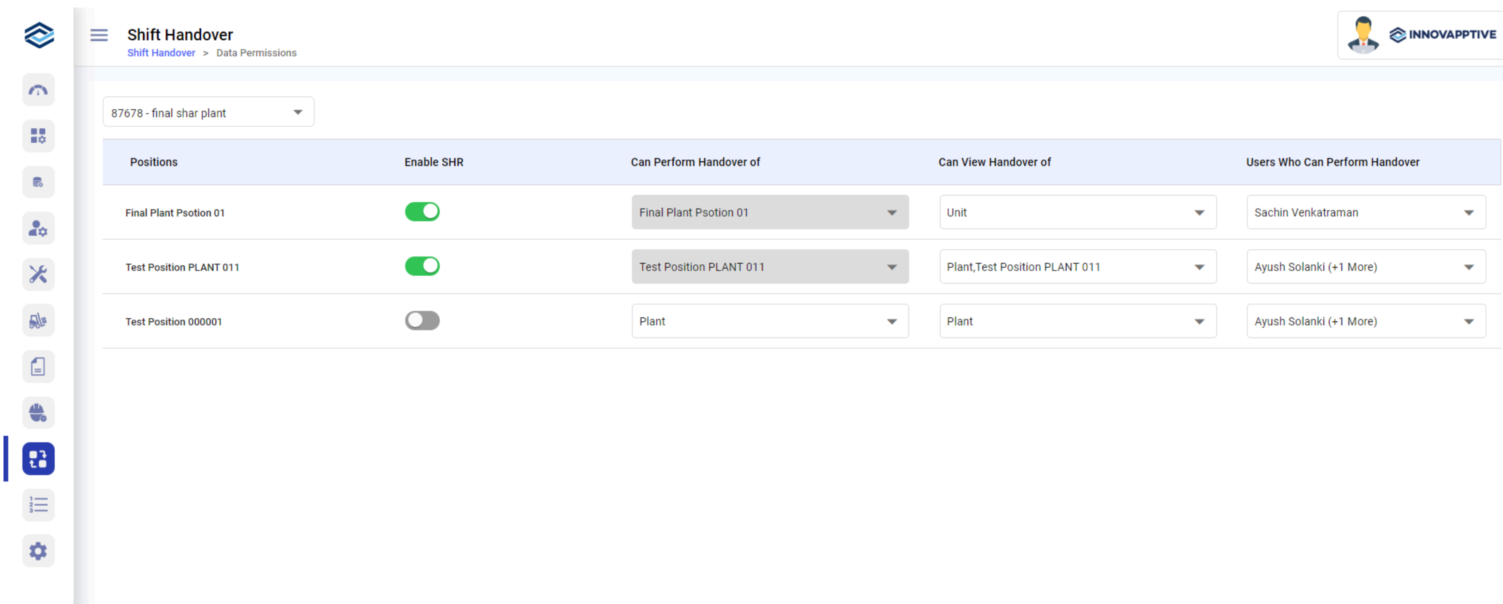
11.4. Manage Shift Handover Authorization

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

To control shift handover template permissions:

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

Figure 11-10 Shift Handover Data Permissions



11.5. Email Configuration for Shift Handover Reports

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

Access Email Configuration

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

Set Up Distribution Levels

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

Configure Recipients

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

Finalizing Configuration

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

How It Works

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

Best Practices

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

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

12. Locate Rounds, Issues, and Actions

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

This section contains the following:

12.1. Search for a Round, Issue, or Action

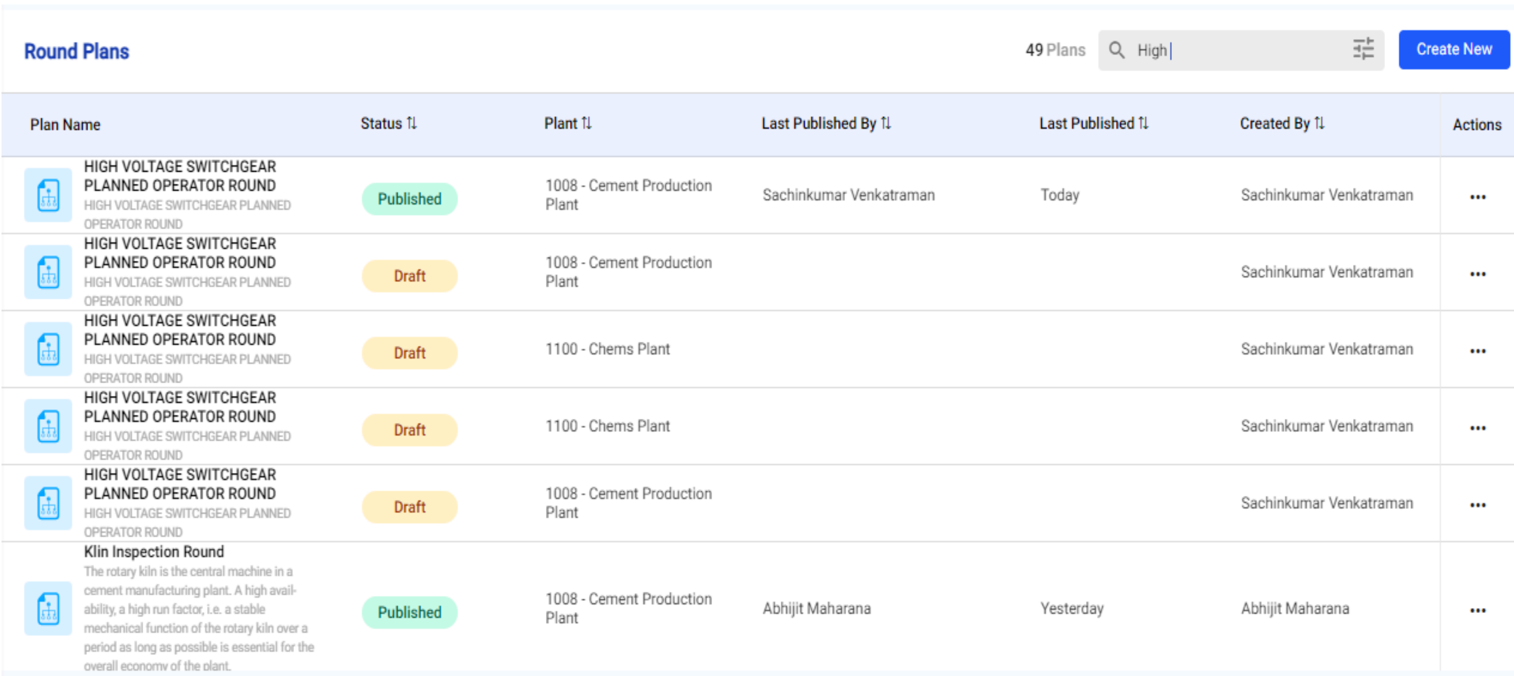
You can search for created, published (scheduled and unscheduled), archived round plans, issues, and actions from their respective screens.

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

To search round plans, issues, and actions:

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

Figure 12-1 Search



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

12.2. Apply Filters to Refine Results

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

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

To filter round plans, issues, and actions:

1. Click the **Round Plans** section on the left-side pane.
   Click **Scheduler** for published plans, click **Archived** for archived plans and **Observations** to filter issues and actions.

   You can filter the rounds quickly by selecting the smart filters such as Today, 7D, 30D, 3M, 6M and custom fields.
2. For additional filters, click the **Filters** icon next to the Search field.

3. In the Filter window, select the **Status**, **Modified By**, **Created By**, and **Plants** values from the drop-down. For example, select **Status** = **Open** and **Priority** = **High**.

Figure 12-2 Filter Rounds

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

13. Archive, Restore, and Delete Round Plans

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

This topic contains the following sub topics:

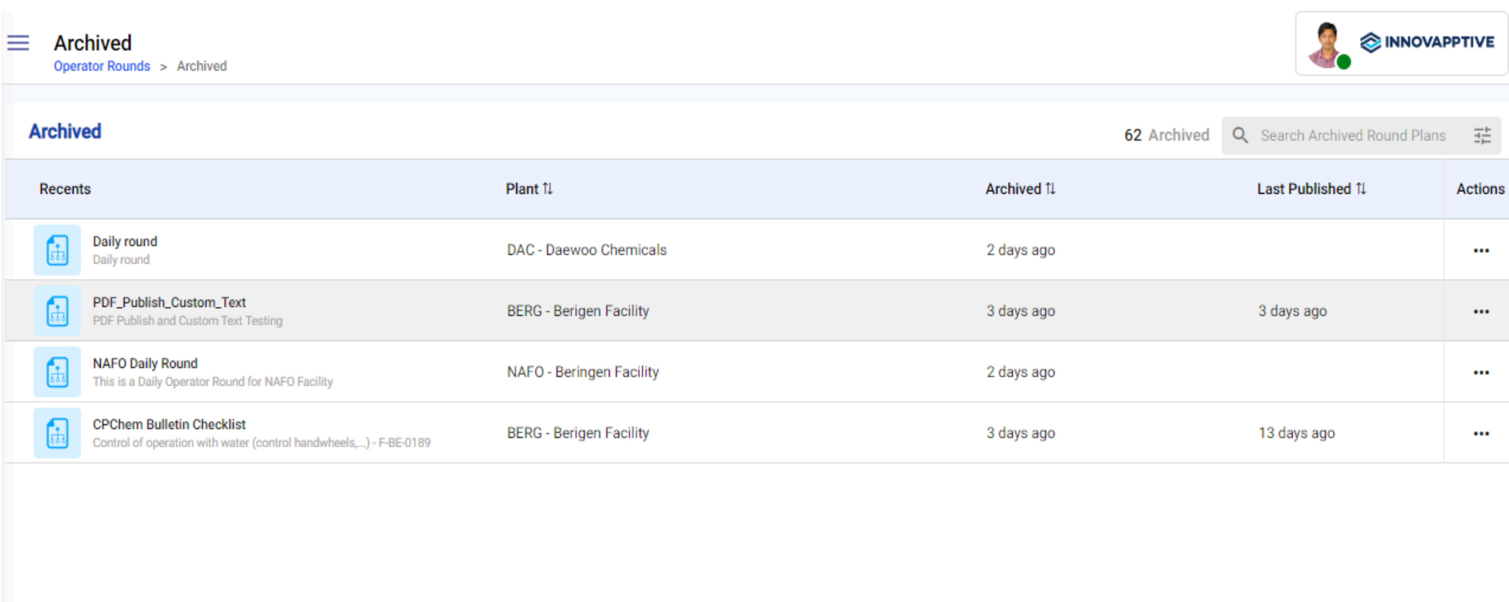
13.1. Archive a Round Plan

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

To archive a round plan:

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

Figure 13-1 Archived Screen



13.2. Restore a Round Plan

Restore archived round plans when you need them again.

To restore an archived round plan:

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

13.3. Delete a Round Plan

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

To permanently delete an archived round plan:

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

14. Create and Manage Round Templates

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

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

Templates have the following status:

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

14.1. Create a Round Plan Template

Create a round template with sections and tasks.

To create a round template:

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

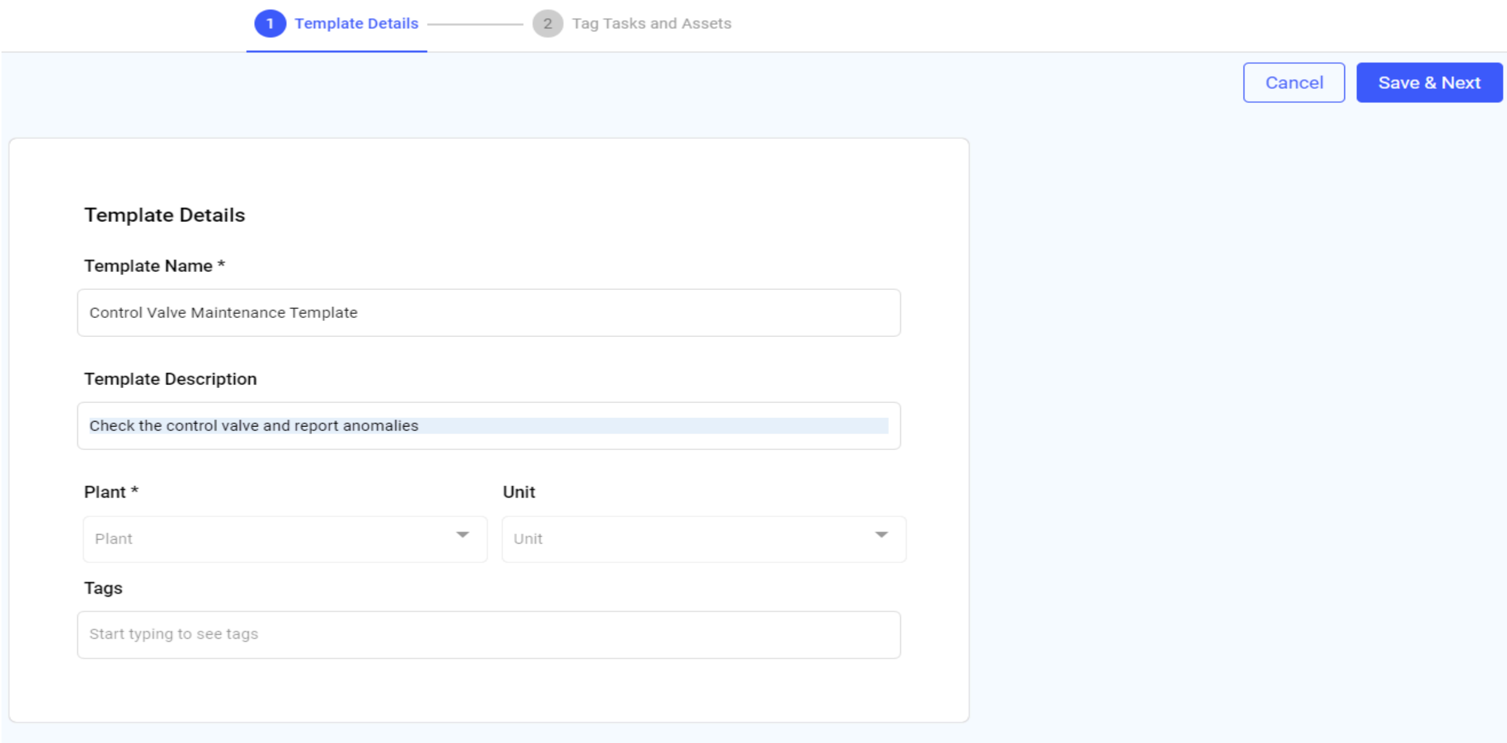
   The Templates screen with the list of round templates is displayed.
2. Click the **Create New** button on the right side.
3. In the **Template Details** screen, fill in the following details.

   Table 14-1 Fill Template Details

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

Field	Description
Unit	Select a relevant unit from the drop-down.
Tags	Add relevant tags.

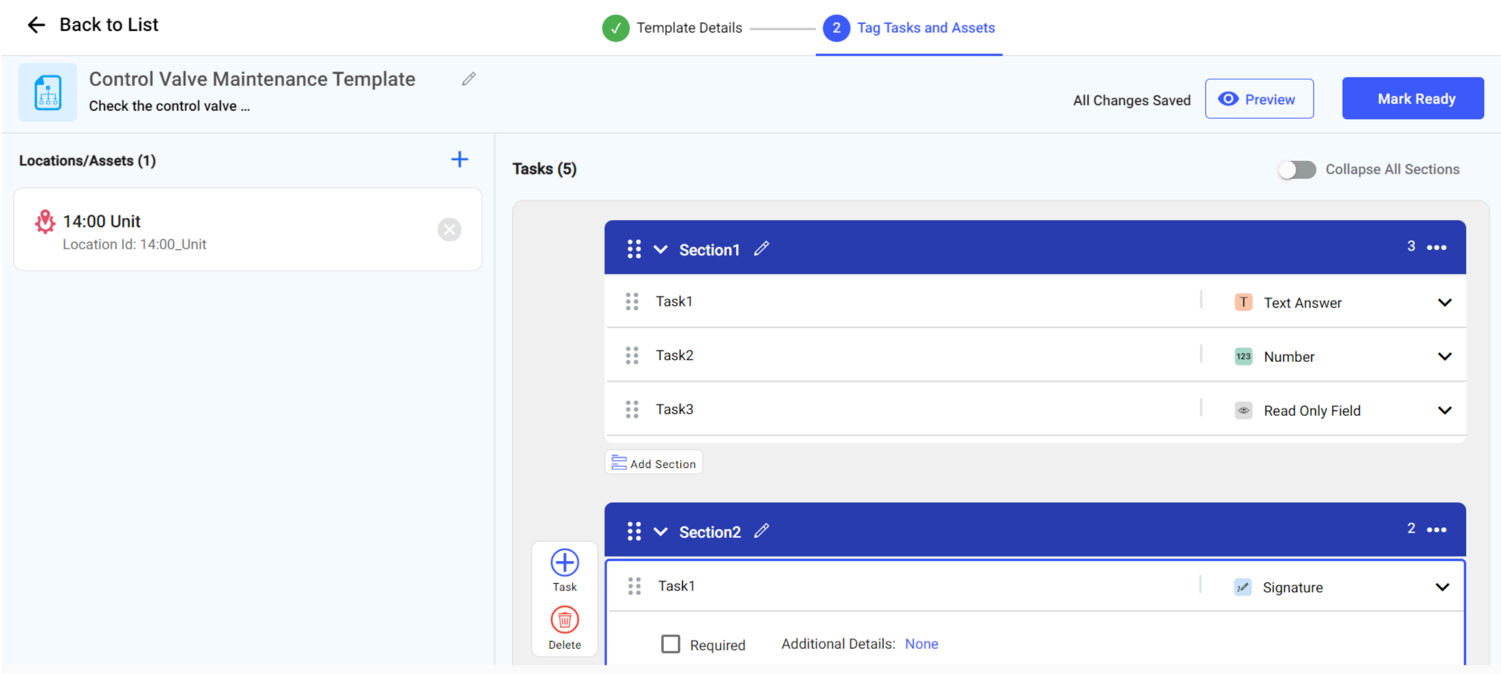
Figure 14-1 Templates Details Screen



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

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

Figure 14-2 Tag Tasks and Assets Screen

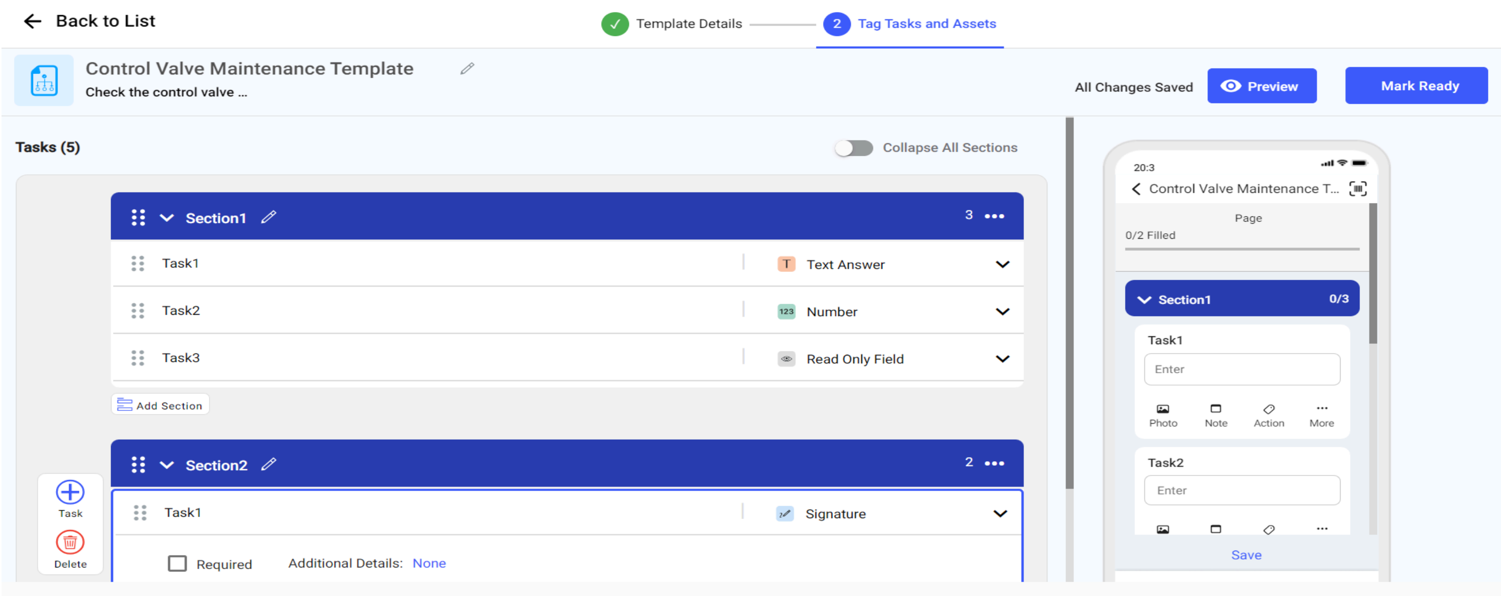


6. In the **Tag Tasks and Assets** screen, select the location or asset on the left side, add pages, multiple sections, and tasks with response types and conditional logic for the location or asset. For more information, see Create a Round Plan and Publish *(on page 110)*.

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

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

Figure 14-3 Template Preview



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

14.2. Create Templates from Existing Templates

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

To copy an existing template and create a new one:

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

14.3. Create Round Plan Template using AI

Speed up template creation with AI-powered automation. Instead of building Round Plan templates manually, you can now generate them by simply providing a prompt and uploading supporting documents—such as PDFs, Excel files, or Word documents.

The system reads both your instructions and the uploaded documents to create a template that matches your needs. You can also choose specific pages or sections to focus on while generating the template.

This feature helps you save time, reduce manual effort, and maintain consistency across all your Round Plans—without compromising on quality.

To create round plan template using AI:

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

   The Templates screen with the list of round templates is displayed.
2. In the **Templates** screen, click the **Create Using AI** button at the top-right corner.
3. In the **Choose a Starting Point** screen, select either
   - Upload and Convert,
     - Choose the relevant **Plant and Unit** from the drop-down.
     - Click the **Upload** icon and select the file (image or pdf) from your device.
   - Click the Describe your Round Template,
     - Choose the relevant Plant and Unit from the drop-down.
     - Enter a prompt and upload any relevant attachments for better results.
4. In the **Template Details** screen, the AI will analyze the uploaded content and generate a draft Round Plan.
5. Click **Continue** on top-right.
6. In the **Tag Tasks and Assets** screen, review the generated Round Plan to ensure it reflects the prompt and referenced content, including appropriate field details, labels, and layout.
7. You can edit the generated template as needed—adjust field types, labels, and mandatory fields.
8. Once all changes are complete, click **Mark Ready**.
9. In the Round Plans that will reflect Template changes window, select the round plans that should be updated with the new template changes.
10. Click **Done** to complete the template creation.

    The new template appears on the Templates screen with a Ready status.

14.4. Edit Round Templates

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

To edit a round template:

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

14.5. Archive Round Templates

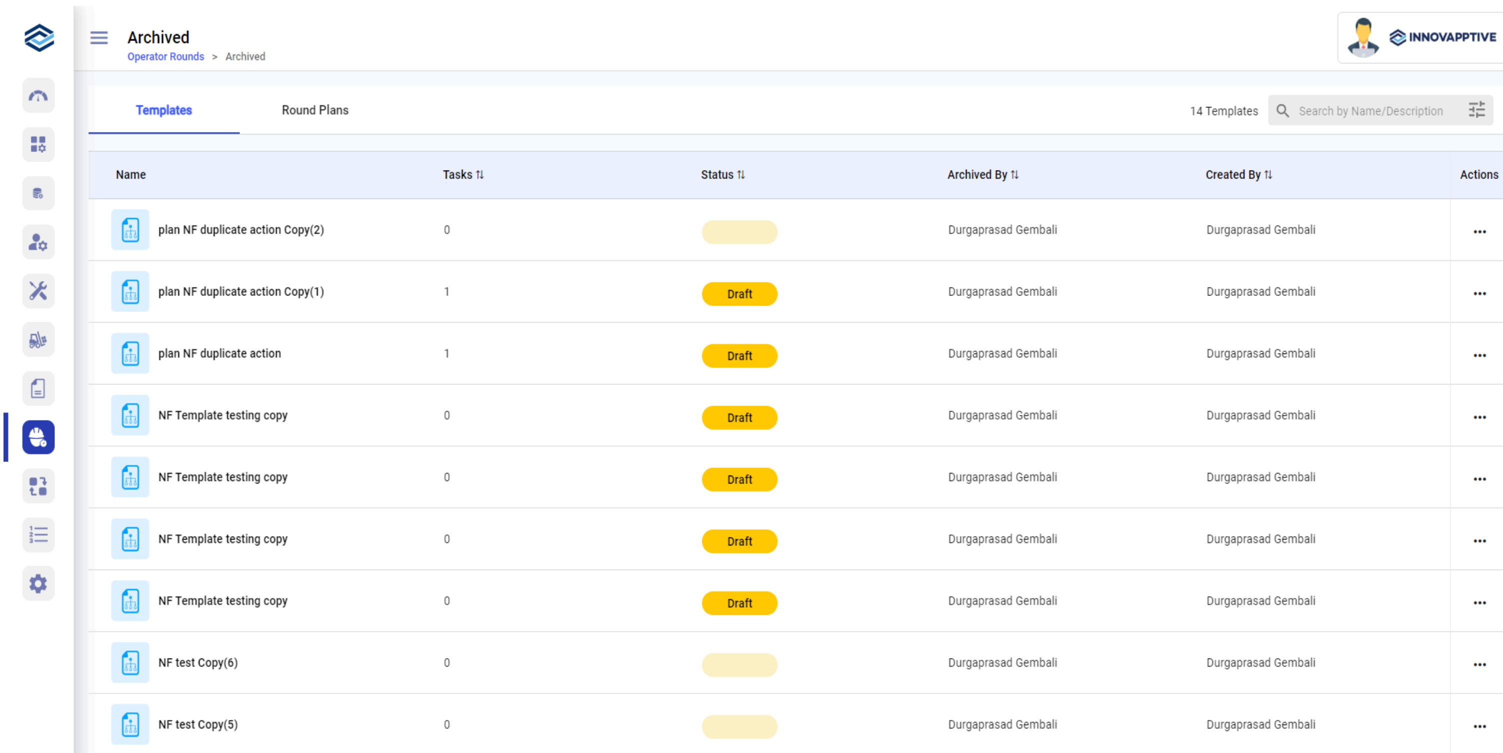
Archive round templates when they are no longer required for asset maintenance. You can also restore archived templates or delete them.

To archive a round template:

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

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

Figure 14-4 Archived Templates



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