

# **iMaintenance User Guide for Supervisors**

## **Connected Worker Solutions**



# Title and Copyright

**Copyright** and **Terms of Use** page for **iMaintenance**.

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

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**Notice:**

**mWorkOrder (mWO)** has been renamed and upgraded as **iMaintenance**. All previous references to **mWorkOrder** now refer to **iMaintenance**—our enhanced, unified, and intelligent maintenance platform. This change reflects our continued commitment to delivering a modern, streamlined experience across all maintenance operations.

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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
<b>boldface</b>	Indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Indicates book titles, emphasis, or placeholder variables for which you supply values.
<code>monospace</code>	Indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter

## Related Products & Solutions

- [Work Order Management](#)
- [Inventory and Warehouse Management](#)
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# 1. Introduction to iMaintenance

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

This chapter has the following topics:

- [Overview of iMaintenance Application \(on page 7\)](#)
- [iMaintenance Benefits for Supervisor and Technicians \(on page 8\)](#)
- [System Requirements \(on page 18\)](#)

## 1.1. Overview of iMaintenance Application

iMaintenance is a mobile-first work order management solution designed to streamline maintenance operations in plants. It digitizes maintenance workflows, replacing paper-based processes with an intuitive mobile system. Supervisors and technicians can seamlessly create, assign, track, and complete work orders from anywhere, ensuring real-time updates and efficient task execution. By reducing manual data entry errors and optimizing asset maintenance, iMaintenance enhances productivity, minimizes downtime, and improves overall operational efficiency.

### Key Features

#### Efficient Work Order Management

- Create, update, and track work orders directly in the mobile application.
- Work orders can be assigned, reassigned, and completed with real-time status updates.
- Supports both partial and final confirmations for operations.

#### Intelligent Issue Reporting

- Users can report equipment issues promptly to prevent unexpected failures.
- AI-powered analysis recommends the best equipment and functional location based on historical data, keywords, and images.
- Supervisors receive instant alerts and can take corrective action quickly.

#### AI-Powered Assistance (SIA)

- Users can interact with the AI assistant (SIA) to ask questions and retrieve relevant information.
- AI analyzes past equipment issues and suggests corrective actions.
- Image-based issue recognition helps identify maintenance needs.

### **Offline Functionality and Synchronization**

- Users can continue working without an internet connection.
- Offline entries, including timesheets and work orders, sync automatically when back online.
- Ensures no data loss or inconsistencies during network disruptions.

### **Timesheet Tracking and Approval**

- Technicians can log work hours manually or automatically against work orders and operations.
- Supervisors can approve, reject, or request modifications to timesheets.
- Supports SAP posting for approved timesheets to ensure compliance.

iMaintenance empowers technicians with a mobile-first approach to work order execution, ensuring faster, more accurate maintenance processes while reducing downtime.

## **1.2. iMaintenance Benefits for Supervisor and Technicians**

For **Supervisors**, iMaintenance provides essential features to manage work orders efficiently:

- **Seamless Work Order Management:** Create, assign, and track work orders effortlessly, ensuring the right tasks reach the right technicians.
- **Comprehensive Insights:** Access detailed equipment history with Asset 360.
- **Real-Time Progress Monitoring:** To drive productivity, gain complete visibility into work status, issue resolution, and technician performance using the Home screen (Dashboard).
- **Prioritized Emergency Handling:** Quickly initiate and escalate urgent repairs, ensuring minimal downtime and operational continuity.
- **Enhanced Safety Compliance:** Approve permits, enforce safety protocols, and validate compliance before work execution.
- **Dynamic Work Order Adjustments:** Modify assignments, update priorities, and reassign tasks as needed to maintain workflow efficiency.

For **Technicians**, iMaintenance provides essential tools to manage their daily tasks efficiently:

- **Execute Work Orders:** Access assigned work orders and operations, initiate job activities, and efficiently complete maintenance tasks.
- **Seamless Permit & Material Collection:** Scan QR codes to verify and collect necessary permits, tools, and components before starting work.
- **Pause & Resume Operations:** Temporarily hold operations when needed and seamlessly resume work without losing progress.
- **Confirm & Track Work Completion:** Log completed tasks, track work hours, and submit real-time progress reports.
- **Streamlined Work Order Closure:** Mark tasks as completed, update key details, and ensure accurate documentation.
- **Comprehensive Work Logging:** Digitally record work progress, attach supporting documents, and update task statuses for full transparency.

## 1.3. What's New for Supervisors in iMaintenance

This section highlights the latest features and enhancements introduced across recent iMaintenance releases for Supervisors.

- [New Features and Enhancements in Release 2507 \(on page 9\)](#)
- [New Features and Enhancements in Release 2506 \(on page 12\)](#)
- [New Features and Enhancements in Release 2505 \(on page 15\)](#)
- [New Features and Enhancements in Release 2504 \(Beta\) \(on page 17\)](#)

### New Features and Enhancements in Release 2507

**Table 1-1 New Features and Enhancements in Release 2507**

<p><b>Improved AI Input Flexibility for Issues and Work Orders (iOS &amp; Android)</b></p> <p>The app now allows users to provide input to the AI model while creating an Issue or Work Order using text only, image(s) only, or both text and image(s). This flexibility ensures users can report issues or create work orders in the most convenient way based on their on-the-ground conditions.</p> <p>For more information, see <a href="#">Create a Work Order (on page 58)</a>.</p>
<p><b>View Default Values for Numeric Responses (iOS &amp; Android)</b></p>

**Table 1-1 New Features and Enhancements in Release 2507 (continued)**

The iMaintenance mobile app now displays default values configured for numeric response fields as soon as the form is opened. This ensures technicians see the intended starting value immediately, without manual input.

For more information, see [Add Forms \(on page 77\)](#).

#### **Auto-Populate Operation Number for Single-Operation Work Orders (iOS)**

Supervisors can now view the operation number in the “Component Create” screen when a work order contains only one operation. This removes the need for manual selection, reducing clicks, preventing errors, and improving overall efficiency.

For more information, see [Add Components \(on page 70\)](#).

#### **Improved AI Accuracy with EQ/FL Context in Work Order Creation (iOS & Android)**

Improved the accuracy of AI-generated field suggestions (Title, Description, Priority, etc.) by sending Equipment (EQ) or Functional Location (FL) details when creating a Work Order from their respective modules. By providing asset-specific context, AI delivers more relevant and precise recommendations, enabling faster form completion and reducing manual effort and errors.

For more information, see [Create a Work Order \(on page 58\)](#).

#### **View Offline Messages in Chat (iOS & Android)**

Users can now view and send messages while offline, ensuring uninterrupted communication in low or no connectivity environments. This capability supports remote and industrial locations, such as plants, mines, and offshore rigs, helping maintain operational momentum until connectivity is restored.

For more information, see [Home \(Dashboard\) \(on page 28\)](#).

#### **View Planned Hours and Ongoing Work Orders per Technician (iOS & Android)**

Supervisors can now view planned hours and ongoing work orders for each technician, providing real-time visibility into workloads. This enables more informed task allocation, better shift planning, and early identification of under- or over-utilization.

**Table 1-1 New Features and Enhancements in Release 2507 (continued)**

For more information, see <a href="#">Home (Dashboard)</a> (on page 28).
<p><b>View and Manage SharePoint Attachments (iOS &amp; Android)</b></p> <p>Users can now view, add, annotate, and manage SharePoint attachments (images, PDFs, documents, etc.) directly within the application. Attachments linked via GOS or DMS to Work Orders, Notifications, Equipment, or Functional Locations are accessible in-app, enabling seamless document access and collaboration for technicians and supervisors.</p> <p>For more information, see <a href="#">Add Forms</a> (on page 77).</p>
<p><b>Clear Messages for Failed AI Responses (iOS &amp; Android)</b></p> <p>When you create a Work Order using AI Detect or AI Plan, you can now see clear, user-friendly messages if the AI is unable to generate a response. This helps you understand the situation without being shown technical error details and guides you to the right next step using available call-to-actions.</p> <p>For more information, see <a href="#">Create a Work Order</a> (on page 58).</p>
<p><b>View References for AI-Detected Priority (iOS &amp; Android)</b></p> <p>When you create a Work Order using AI, you can now see the reference information the AI used to determine the priority. This helps you understand why a certain priority was assigned, builds trust in AI suggestions, and allows you to explore similar past cases for better decision-making.</p> <p>For more information, see <a href="#">Create a Work Order</a> (on page 58).</p>
<p><b>Auto-Populated Date and Time for Measuring Documents (iOS &amp; Android)</b></p> <p>When you create or update a Measuring Document, the Date and Time fields are now automatically populated with the current system date and time. This removes the need for manual entry and speeds up the process. The feature is available on the Measuring Document screen accessed from Equipment or Functional Location detail pages.</p> <p>For more information, see <a href="#">Create a Measuring Point</a> (on page 96).</p>

**Table 1-1 New Features and Enhancements in Release 2507 (continued)**

**Auto-Populate Works for Non-Reference Key in Embedded Forms (iOS & Android)**

Supervisors can define which fields should automatically populate when creating a form, along with the flexibility to configure each field's properties, such as editable or read-only. This feature ensures consistency, reduces manual entry, and gives administrators control over how data is captured.

For more information, see [Add Forms \(on page 77\)](#).

**Supports Date Range Response Type in Mobile Application (iOS & Android)**

Introduced a new Date Range response type in the mobile application, allowing users to capture both a start date and an end date within a single field. This enhancement simplifies data entry, ensures consistency across platforms, and supports use cases where tracking time periods is essential.

For more information, see [Add Forms \(on page 77\)](#).

**New Features and Enhancements in Release 2506**

**Table 1-2 New Features and Enhancements in Release 2506**

**Create Sub-Work Orders from Parent Work Orders (iOS & Android)**

Supervisors can now create Sub-Work Orders directly from an existing Parent Work Order—ideal for breaking down large jobs or managing dependent tasks. Key details like Equipment and Functional Location are automatically inherited from the parent, while operations and scheduling remain independent. For example, during a major overhaul, a planner can spin off specialized electrical or inspection tasks into sub-orders without duplicating effort.

For more information, see [Create a Sub Work Order \(on page 79\)](#).

**View and Manage Work Orders from the Homepage Dashboard (iOS & Android)**

Supervisors can now view and interact with Work Orders directly on the dashboard using filters like priority, status, type, and timeline. This streamlined view improves situational awareness and helps teams stay focused on the most critical tasks.



**Table 1-2 New Features and Enhancements in Release 2506 (continued)**

For more information, see <a href="#">Home (Dashboard)</a> (on page 28).
<p><b>View Issues at a Glance on the Supervisor Dashboard (iOS &amp; Android)</b></p> <p>Supervisors can now see all reported issues within their work center directly from the dashboard, along with real-time status and count. This feature enhances visibility, accountability, and response time across maintenance operations.</p> <p>For more information, see <a href="#">Home (Dashboard)</a> (on page 28).</p>
<p><b>Track Overdue Work Orders on the Supervisor Dashboard (iOS &amp; Android)</b></p> <p>Supervisors can now view all overdue Work Orders right from the dashboard—along with their priority and count—enabling faster response to delays and better workload control.</p> <p>For more information, see <a href="#">Home (Dashboard)</a> (on page 28).</p>
<p><b>Visualize Complete Functional Location Hierarchies (iOS, Android)</b></p> <p>Supervisors can now view the full hierarchy of a Functional Location (FL) directly within the mobile app—including all connected Equipment and Bill of Materials (BOMs).</p> <p>For more information, see <a href="#">View Functional Location Details</a> (on page 99).</p>
<p><b>View Complete Equipment Hierarchy (iOS)</b></p> <p>Supervisors can now explore the hierarchy of specific Equipment, including its parent Functional Location and linked BOMs.</p> <p>For more information, see <a href="#">View Equipment Details</a> (on page 91).</p>
<p><b>Delete Non-Sync Records from Outbox (iOS &amp; Android)</b></p> <p>Users can now remove unsynced or failed records directly from the Outbox, ensuring better control over offline data and reducing clutter from outdated or incorrect entries.</p> <p>For more information, see <a href="#">Home (Dashboard)</a> (on page 28).</p>

**Table 1-2 New Features and Enhancements in Release 2506 (continued)**

<p><b>Share or Print Submitted Forms Seamlessly (iOS &amp; Android)</b></p> <p>Users can now share submitted digital forms via email or print them straight from the mobile app—supporting faster communication, documentation, and compliance based on tenant-specific configurations.</p> <p>For more information, see <a href="#">Close a Work Order (on page 84)</a>.</p>
<p><b>Scan Materials to Auto-Fill Component Details (iOS &amp; Android)</b></p> <p>Speed up component entry by scanning barcodes or QR codes to automatically populate Material Number and Description when adding components to Work Orders. This eliminates manual entry errors, enhances accuracy, and improves technician efficiency in the field.</p> <p>For more information, see <a href="#">Add Components (on page 70)</a>.</p>
<p><b>View Complete Functional Location Context in the Mobile App (iOS &amp; Android)</b></p> <p>Supervisors can now access detailed Functional Location (FL) data on mobile—including DMS documents, BOM, hierarchy, and FL position—right from the app.</p> <p>For more information, see <a href="#">View Functional Location Details (on page 99)</a>.</p>
<p><b>Support for Instruction Response Type in Embedded Forms (iOS &amp; Android)</b></p> <p>Embedded Forms now support the Instruction response type, allowing you to display read-only guidance within the form itself—no more switching to PDFs or external materials. This improves clarity in complex scenarios, reduces manual input, and boosts technician efficiency in the field.</p> <p>For more information, see <a href="#">Add Forms (on page 77)</a>.</p>
<p><b>Auto-Assign Forms to Work Orders Based on Configured Criteria (iOS &amp; Android)</b></p> <p>Forms are now automatically assigned to Work Orders based on Equipment, Functional Location, Task List, Maintenance Plan, or Order Type—using configuration rules set in RACE.</p> <p>For more information, see <a href="#">Add Forms (on page 77)</a>.</p>

**Table 1-2 New Features and Enhancements in Release 2506 (continued)**

<p><b>View Configurable Quick Filters</b></p> <p>Users can now access quick filters based on RACE configuration—enabling faster navigation and task prioritization.</p> <p>For more information, see <a href="#">Work Orders (on page 36)</a>.</p>
<p><b>Geo-Tagging for Accurate Equipment Suggestions (iOS &amp; Android)</b></p> <p>Users can now send geographic coordinates along with prompts when creating standalone work orders. This enables the AI engine to recommend the most accurate equipment based on real-time location context.</p> <p>For more information, see <a href="#">Create a Work Order (on page 58)</a>.</p>
<p><b>Sort Work Orders and Operations by Planned Start Date for Accurate Scheduling (iOS &amp; Android)</b></p> <p>Work Orders and Operations are now displayed based on their Planned Start Date rather than creation date. For example, a Work Order created today but scheduled to start tomorrow will now appear under tomorrow's bucket—aligning with real-world scheduling and improving day-wise planning accuracy.</p> <p>For more information, see <a href="#">Work Orders (on page 36)</a>.</p>

## **New Features and Enhancements in Release 2505**

**Table 1-3 New Features and Enhancements in Release 2505**

<p><b>Streamline Issue Lifecycle with User Status Control (iOS &amp; Android)</b></p> <p>Supervisors can now view and update the User Status of issues from within the mobile app. Whether your statuses are sequential (e.g., “Open → In Progress → Closed”) or non-sequential (e.g., “Awaiting Parts” used at any stage), this enhancement helps maintain lifecycle control aligned with business rules.</p> <p>For more information, see <a href="#">Review Raised Equipment Issues (on page 51)</a>.</p>
--

**Table 1-3 New Features and Enhancements in Release 2505 (continued)**

**Control Work Order Progress with User Status Selection and Validation (iOS, Android)**

Work Orders can now be updated with new User Statuses—directly from the app—while respecting SAP’s validation rules.

For example, if a technician tries to move a Work Order from “Created” to “Completed” without going through the “In Progress” status, the app will prevent this unless allowed by SAP logic.

For more information, see [Create a Work Order \(on page 58\)](#).

**Track Real-Time Work Orders and Operation Logs (iOS & Android)**

All activities related to a Work Order or its Operations—like assignments, updates, or status changes—are now captured in a real-time log visible within the mobile session.

For more information, see [Home \(Dashboard\) \(on page 28\)](#).

**Select Equipment & Functional Location Instantly During Work Order Creation (iOS & Android)**

Tapping on the Equipment (EQ) or Functional Location (FL) field now brings up a searchable dropdown list, making it faster and easier to select the correct asset while creating a work order.

For more information, see [Create a Work Order \(on page 58\)](#).

**Approve or Reject Submitted Timesheets in the Timesheet Module (iOS & Android)**

Supervisors can now approve or reject technician-submitted timesheets directly within the mobile app.

For more information, see [Approve or Reject Timesheets \(on page 85\)](#).

**Contextual Chat for Real-Time Collaboration (iOS & Android)**

Supervisors can now chat with each other directly within a Work Order—keeping all conversations tied to the job context.

**Table 1-3 New Features and Enhancements in Release 2505 (continued)**

For more information, see <a href="#">Home (Dashboard)</a> (on page 28).
<p><b>On-Demand SAP Sync with Manual Sync Button (iOS &amp; Android)</b></p> <p>Users can now manually trigger a sync with SAP from the mobile app home screen using the new Manual Sync button.</p> <p>For more information, see <a href="#">Home (Dashboard)</a> (on page 28).</p>
<p><b>View and Manage SharePoint Attachments Within iMaintenance (iOS &amp; Android)</b></p> <p>Supervisors can now view, add, annotate, and manage SharePoint attachments—such as PDFs, images, and documents—directly within the mobile app.</p> <p>For more information, see <a href="#">Create a Work Order</a> (on page 58).</p>

## **New Features and Enhancements in Release 2504 (Beta)**

**Table 1-4 New Features and Enhancements in Release 2504 (Beta)**

<p><b>Track Work Execution in Real Time with the Supervisor Dashboard (iOS, Android)</b></p> <p>The new Supervisor Dashboard gives you a unified, real-time view of work order distribution, technician activity, pending approvals, and issue status—all filtered to your work center. It's your operational control panel to monitor progress, identify delays, and take timely action without switching screens.</p> <p>For more information, see <a href="#">Home (Dashboard)</a> (on page 28).</p>
<p><b>Instantly Create a New Work Order by Duplicating an Existing One (iOS, Android)</b></p> <p>Creating similar work orders just got faster. With the new Duplicate option, you can create a new work order by copying all relevant details from an existing one—whether it originated from SAP or was created in the mobile app.</p> <p>For more information, see <a href="#">Create a Work Order from Existing One</a> (on page 82).</p>
<p><b>Auto-Assign Components When Adding Operations from Task Lists (iOS, Android)</b></p>

**Table 1–4 New Features and Enhancements in Release 2504 (Beta) (continued)**

Work Order creation is now faster and more accurate. When you add operations from a task list, any associated components are automatically added—eliminating manual entry and ensuring accurate material planning.

For more information, see [Add Components \(on page 70\)](#).

**Close Issues Without a Work Order—Now Directly from the App (iOS, Android)**

Not every issue needs a work order. With this new capability, users can now mark issues as Completed directly from the mobile app—even for SAP-synced issues—without converting them into work orders. This adds flexibility for quickly resolving low-impact issues, while maintaining traceability and ERP alignment.


Users can complete any issue in Released or In Progress status by adding a mandatory comment and, optionally, attaching media. Completion works both online and offline, with updates syncing to SAP automatically when reconnected.

For more information, see [Release and Convert Issues into Work Orders \(on page 51\)](#).

## 1.4. System Requirements

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

System	Minimum Requirements
<b>Compatible Form Factors</b>	<b>iOS</b> – Tablets and Phones <b>Android</b> – Tablets and Phones
<b>Compatible Device(s)</b>	<b>iOS</b> Supported Versions: Latest iOS version (iOS 18.3.2) and two previous major versions. Example (as of iOS 18 being current): iOS 18, iOS 17, iOS 16 <b>Android</b>

System	Minimum Requirements
	Supported Versions: Latest Android version (Android 15) and two previous major versions. Example (as of Android 15 being current): Android 15, Android 14, Android 13
<b>Compatible Browser(s)</b>	<p><b>iOS (Safari)</b></p> <p>Supported Versions: Latest version (Safari 18.4) and two previous versions of Safari.</p> <div>  <b>Note:</b>  Based on the Safari version available with the corresponding iOS versions listed above. </div> <p><b>Windows 11</b></p> <p>Supported on the latest and two previous major versions of the following browsers:</p> <ul style="list-style-type: none"> <li>• <b>Google Chrome</b> - Example (as of Chrome version 135): Chrome 134, 132, 133</li> <li>• <b>Microsoft Edge</b> - Example (as of Edge version 135): Edge 135, 134, 133</li> </ul>
<b>Device Storage and Memory Requirement</b>	<p>All devices must have a minimum of <b>64GB</b> of storage and <b>4GB</b> of RAM to support online data processing effectively.</p> <p>A configuration of 64GB storage and 4GB RAM is recommended to ensure optimal performance, particularly when handling higher volumes of data, including document processing and offline storage capabilities. Ac-</p>

System	Minimum Requirements
	tual performance may vary depending on the total volume of data being managed and the amount of available memory on the device.



**Note:**

- "Current" refers to the officially released stable version available to the public at the time of access.
- Compatibility may vary for beta or developer preview versions of operating systems or browsers.
- It is recommended to keep devices and applications updated for the best security and feature support.



## 2. Get Started with the Application

This chapter has the following topics:

- [Log in to the iMaintenance Application \(on page 21\)](#)
- [iMaintenance Dashboard and Main Screens \(on page 28\)](#)
- [Buttons and Icons in Application \(on page 40\)](#)

### 2.1. Log in to the iMaintenance Application

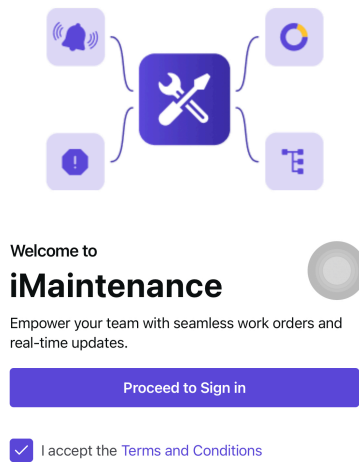
Log in to the iMaintenance application securely using a standard login procedure which involves entering a company or domain, username, and password.

To log in to the application:

## | 2 - Get Started with the Application


1. Open the application.
2. In the Welcome screen, accept **Terms and Conditions** and tap **Proceed to Sign in**.

Figure 2-1 Welcome Screen



3. In the **Domain** screen, enter the company domain and tap **Next**.

Figure 2-2 Domain Screen



**Domain**

Enter your Company Domain

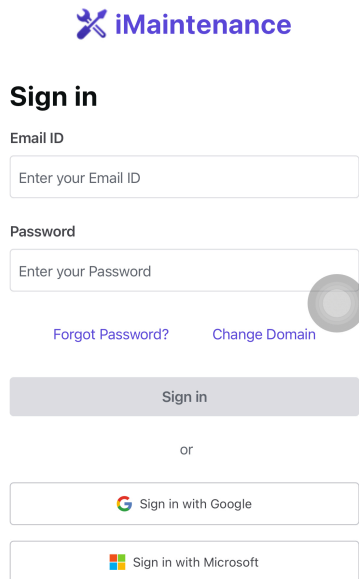
.innovapptive.com

Next

Don't have a domain?  
Visit our [website](#) to connect with our sales team.

4. In the **Sign in** screen, enter **Email ID** and **Password** and tap **Sign in**.

Figure 2-3 Sign In Screen



The image shows the iMaintenance Sign in screen. At the top is the iMaintenance logo. Below it is the heading "Sign in". There are two input fields: "Email ID" with the placeholder text "Enter your Email ID" and "Password" with the placeholder text "Enter your Password". Below the password field are two links: "Forgot Password?" and "Change Domain". A "Sign in" button is located below these links. Below the button is the word "or". At the bottom are two buttons: "Sign in with Google" and "Sign in with Microsoft". A grey circular icon is visible on the right side of the password field.

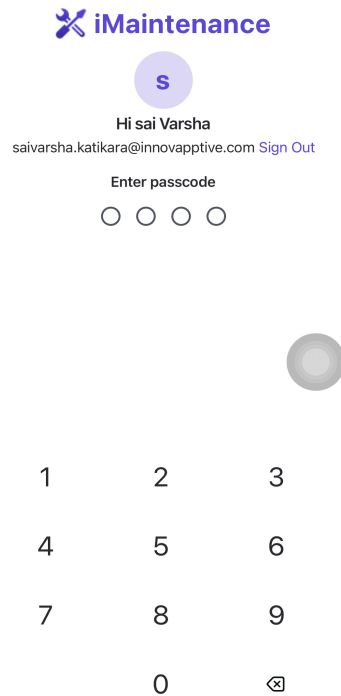
### 2.1.1. Create Passcode

When you log in for the first time, the iMaintenance application prompts you to create a passcode. Passcode allows for faster login by eliminating the need to re-enter your domain, username, and password when you open the app the next time

To create a passcode:

1. In the Secure your account screen, tap **Set up now**.
2. Enter the passcode number in the **Create Passcode** screen.
3. Re-enter the same number in the **Confirm Passcode** screen.

Figure 2-4 Create Passcode Screen



**Note:**

- The passcode is device-specific. If you use a new device, you must create a passcode for that device again.
- If you forget the passcode, you must reinstall the application and create the passcode again.

## 2.1.2. Enable Biometric Access

For quick login to the iMaintenance application, enable biometric access so that you can log in using the fingerprint and face recognition features of the device.

To enable biometric access:

1. In the Set Up Biometric Authentication screen, tap **Enable Biometrics**.
2. Provide your fingerprint in the fingerprint screen to enable login access with your fingerprint.
3. Scan your face to enable login access with your face scan.

When you open the application next time, you can use either username and password, passcode, fingerprint, or facial scan to access it.

The application syncs the data, including master data and attachments for offline access, and displays the Home screen.

Figure 2-5 Offline Sync



With RapidSync, the readings can be logged offline, and the data syncs automatically once connectivity restores. The control room gets instant alerts, enabling fast action to prevent shutdowns. This cuts response time from hours to minutes, reduces unplanned downtime and maintenance costs, and improves Mean Time to Repair (MTTR) by shifting more wrench time to actual fixes, not waiting.

For example, Earlier, a technician monitoring a remote pipeline observed a pressure spike reaching 30 bar—exceeding the safe limit of 25 bar. Due to lack of connectivity, the technician was unable to report it in real time and instead noted it manually. The data was entered into the system hours later, delaying the response and resulting in a production slowdown.

## 2.2. iMaintenance Dashboard and Main Screens

After logging in, the application launches the Dashboard by default. In addition to the Dashboard, iMaintenance includes four other key screens—each designed to help Supervisors and Technicians manage work orders, track issues, and stay updated with alerts. Together, these screens provide the tools needed to streamline maintenance activities and improve operational efficiency.

The application consists the following screens:

- [Home \(Dashboard\) \(on page 28\)](#)
- [Work Orders \(on page 36\)](#)
- [Issues \(on page 38\)](#)
- [Alerts \(on page 39\)](#)
- [More \(on page 39\)](#)

### 2.2.1. Home (Dashboard)

The **Home** (Dashboard) screen combines operational control with real-time alerting to help supervisors and technicians manage tasks efficiently and respond quickly to critical events.

#### **Supervisor Dashboard**

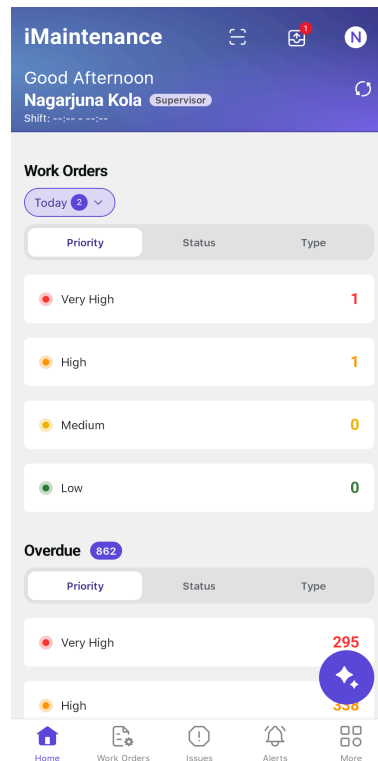
The Supervisor Dashboard serves as a central hub for real-time monitoring and management of maintenance operations. It provides a consolidated view of work order distribution, technician workloads, and pending approvals. Supervisors can view task allocation at a glance, track technician progress, and quickly identify any operational bottlenecks that need attention.

The dashboard also integrates real-time alerts from multiple systems, enabling early detection of critical events such as pressure or temperature anomalies. When defined thresholds are breached—for example, Reactor-7 exceeding 80 psi—an instant alert is displayed, prompting immediate corrective action. This helps reduce response times, avoid unplanned downtime, and improve overall equipment uptime and MTTR (Mean Time to Repair).

The Supervisor Dashboard is divided into the following key sections:



Figure 2-6 Supervisor Dashboard



- **Header**

- Displays the greeting, name, current date, time, and shift details (e.g., 07:00 AM – 03:00 PM).
- The Scan



icon lets you scan the asset from the Dashboard.

- The Outbox



icon lets you view pending records or the transactions that are done in offline mode. You can delete entries that have not yet synced with SAP or those that failed to sync.

- The Profile



icon lets you view the personal profile details.

- The Manual Sync



icon lets you manually synchronize your device with the SAP backend. Use this whenever you want to ensure your app is fully up to date.

- **Work Orders**

- In the Work Orders section, you can apply filters to view data for:
  - Today (Default)
  - Tomorrow
  - This Week
- This section displays three interactive widgets that help you quickly identify and prioritize pending tasks:
  - **Priority:** Displays work orders grouped by priority levels — **Very High, High, Medium, and Low.**
  - **Status:** Displays work orders grouped by their current status — **Created, Released, In Progress, Completed, and Closed.**
  - **Type:** Displays work orders grouped by their type — **Preventive WO, Corrective WO, Breakdown WO, and Emergency WO.**
- Tap any category to open a filtered list of the corresponding work orders.

- **Overdue Work Orders**

- This section displays three interactive widgets **Priority, Status, and Type** that are categorized into different groups along with the count.

- **Issues**

- This section displays following three interactive widgets:
  - **Priority:** Displays issue grouped by priority levels — **Very High, High, Medium, and Low.**
  - **Status:** Displays issues grouped by their current status — **Open, Released, In Progress, Completed, and Rejected.**
  - **Type:** Displays issues grouped by their type — **Corrective and Breakdown.**
- Tap any category to open a filtered list of the corresponding issues.

- **Scheduled Work Orders at Risk**

- Highlights work orders that are scheduled but at risk due to incomplete component kitting (status = *Kitting not done*).
- Each card displays:
  - Work Order ID and Title
  - Priority
  - Equipment ID and Name
  - Assigned Technician
  - Start Time
  - Pending Spare Parts
  - **Chat** and **Action** buttons
- Action options include:
  - **Reschedule**: Modify start and end dates
  - **Reassign**: Change the assigned technician
- You can apply filters (Today, Tomorrow, 3 Days) and browse via a horizontal carousel (4 cards by default).
- **Pending Actions**
  - Displays widgets for three types of pending items:
    - **Technical Completion**: Work orders with status = *Completed*.
    - **Technician Assignment**: Work orders without an assigned operation.
    - **Timesheet Approval**: Timesheets with status = Submitted & Unapproved.
  - Tapping a widget navigates the user to a filtered list view based on the selection.
- **Live Status Overview**
  - Shows a real-time table of technician activity with the following columns:
    - **Planned Utilization**: Displays shows the total planned work for the shift across all technicians.
    - **Shift Progress**: Displays the total completed planned work for the shift.
    - **Technician Name**: Displays the technician name with planned hours.
    - **Shift Progress**: Displays today's operations progress (completed/total).
    - **Current Work Order & Operation**: Displays the job the technician is working on now.
    - **Operation Status**: Displays the status of the operation (In Progress, On Hold, etc.).
    - **Actions**: Displays the chat icon. Tap it to start a conversation with the technician.
    - **Show All**: Tap to view the real-time status of all technicians.
- **Issues Reported by Me**

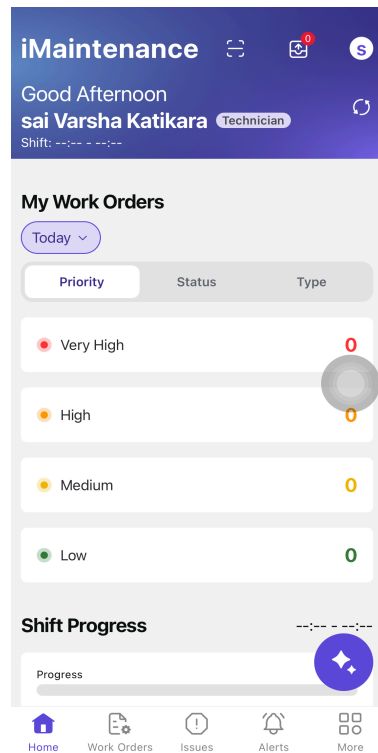
- Displays issue counts categorized as:
  - **Open**
  - **Released**
  - **In Progress**
  - **Completed**
  - **Rejected**
- Tap any category to view the corresponding filtered issue list.
- **Quick Actions**
  - Provides shortcuts for frequently used actions:
    - **Report an Issue:** Create a new issue.
    - **Scan Equipment:** Launch the scanner to view asset health.
    - **Create Work Order:** Create a work order.
    - **Fill Timesheets:** Review and approve timesheets.

## Technician Dashboard

After logging in, technicians are directed to the Home screen, which serves as the main dashboard. It provides a consolidated view of your current workload, progress, and key actions—helping you stay organized and work efficiently throughout your shift.

The Technician Dashboard is divided into the following key sections:

Figure 2-7 Technician Dashboard



- **Header**

- Displays the greeting, name, current date, time, and shift details (e.g., 07:00 AM – 03:00 PM).
- The Scan



icon lets you scan the asset from the Dashboard.

- The Outbox



icon lets you view pending records or the transactions that are done in offline mode.

- The Profile



icon lets you view the personal profile details.

- The Manual Sync



icon lets you manually synchronize your device with the SAP backend. Use this whenever you want to ensure your app is fully up to date.

#### • My Work Orders

- In the Work Orders section, you can apply filters to view data for:
  - Today (Default)
  - Tomorrow
  - This Week
- This section displays three interactive widgets that help you quickly identify and prioritize pending tasks:
  - **Priority:** Displays work orders grouped by priority levels — **Very High, High, Medium, and Low.**
  - **Status:** Displays work orders grouped by their current status — **Created, Released, In Progress, Completed, and Closed.**
  - **Type:** Displays work orders grouped by their type — **Preventive WO, Corrective WO, Breakdown WO, and Emergency WO.**
- Tap any category to open a filtered list of the corresponding work orders.

#### • Issues

- This section displays following three interactive widgets:
  - **Priority:** Displays issue grouped by priority levels — **Very High, High, Medium, and Low.**
  - **Status:** Displays issues grouped by their current status — **Open, Released, In Progress, Completed, and Rejected.**
  - **Type:** Displays issues grouped by their type — **Corrective and Breakdown.**
- Tap any category to open a filtered list of the corresponding issues.

#### • Shift Progress

- Shows a visual progress bar indicating the percentage of operations completed for the selected time period (based on the applied filter).

#### • Live Status Overview

- Shows a real-time table of technician activity with the following columns:
  - **Planned Utilization:** Displays shows the total planned work for the shift across all technicians.
  - **Shift Progress:** Displays the total completed planned work for the shift.
  - **Technician Name:** Displays the technician name with planned hours.
  - **Shift Progress:** Displays today's operations progress (completed/total).
  - **Current Work Order & Operation:** Displays the job the technician is working on now.
  - **Operation Status:** Displays the status of the operation (In Progress, On Hold, etc.).
  - **Actions:** Displays the chat icon. Tap it to start a conversation with the technician.
  - **Show All:** Tap to view the real-time status of all technicians.
- **My Operations**
  - Lists high-priority operations assigned to you, showing:
    - Priority levels
    - Permit and spare part readiness
    - AI-based assistance
  - Tap **AI-Assistance** to launch SIA (Smart In-App Assistant) and view step summaries.
  - Tap **Start** to begin the task and trigger the auto-timer (if permits and parts are already collected).



**Note:**

This section appears only if high-priority tasks are assigned.

• **Preventive Maintenance Tasks**

- Displays PM work orders, if assigned, with due status (e.g., Due in 2 hours or Overdue).
- Tap Start to launch the operation and begin auto-timer (if enabled). If the timer isn't enabled, manually update the task status to In Progress.



**Note:**

This section is shown only when PM tasks are assigned.

• **Issues Reported by Me**

- Lists all issues you've reported, grouped as:
  - Accepted
  - Rejected
  - Pending Review
- Tap any category to open the Issues list with relevant filters applied.



**Note:**

Header filters (Today, Tomorrow, This Week) do not apply here.

• **Quick Actions**

- Provides shortcuts for frequently used actions:
  - **Report an Issue:** Create a new issue.
  - **Scan Equipment:** Launch the scanner to view asset health.
  - **Create Work Order:** Create an emergency work order.
  - **Fill Timesheets:** Fill pending timesheets.



**Note:**

The visibility and layout of dashboard widgets are RACE configurable and may vary based on your organization's configuration.

## 2.2.2. Work Orders

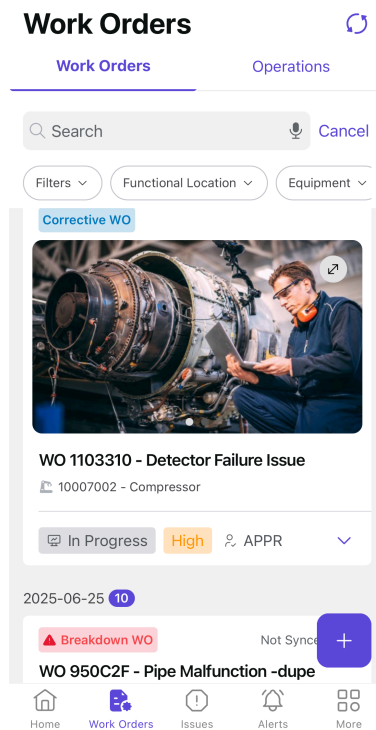
The **Work Orders** screen helps you manage and track your assigned maintenance tasks efficiently. It is categorized into two tabs: **Work Orders** and **Operations**, each designed to provide quick access to essential job details and streamline task execution.

### **Work Orders**

The Work Orders tab displays a comprehensive list of created and assigned work orders, including job descriptions, assigned personnel, due dates, and priority levels. Key details remain accessible even when offline, ensuring uninterrupted workflow.



Figure 2-8 Work Orders Screen



On this screen, you can:

- View list of created and assigned work orders.
- Execute operations and update work order status.
- Get permits, collect components, execute operations, and fill forms.
- Add notes and attachments for better tracking.
- Log work progress to maintain task visibility.
- Filter work orders based on functional location, equipment, assignment, and other criteria.

## Operations

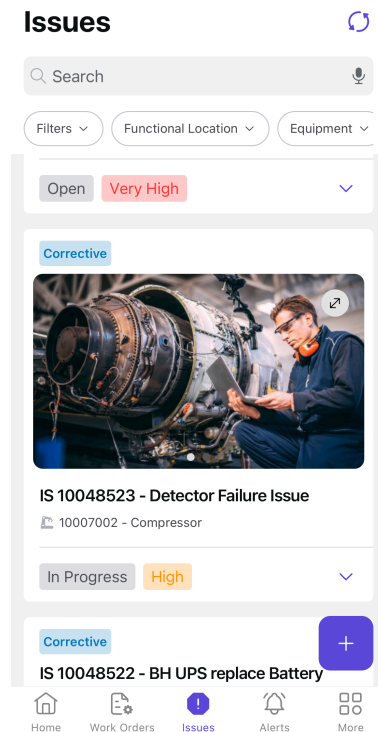
The Operations tab lists the assigned operations, providing a clear breakdown of individual tasks within a work order.

With these features, the Work Orders screen ensures that all necessary information is at your fingertips, enabling efficient task management and execution.

### 2.2.3. Issues

The **Issues** screen provides a centralized view of all reported issues, displaying key details such as description, priority, plant, location, and progress status. It helps you efficiently track and manage issues to ensure timely resolution.

Figure 2-9 Issues Screen



On this screen, you can:

- Report, track, and manage issues related to work orders.
- Filter issues by functional location, equipment, assignment, and other criteria to refine results.
- Identify challenges early to facilitate prompt resolution.
- Document problems, add supporting details, and monitor progress effectively.

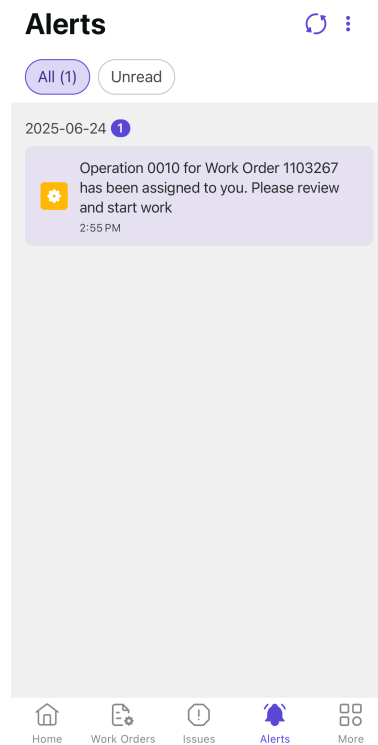
With these features, the Issues screen ensures that all reported concerns are properly documented and addressed, improving overall maintenance efficiency.

## 2.2.4. Alerts

The **Alerts** screen provides real-time notifications on critical updates, urgent tasks, and system alerts. It ensures you stay informed about important changes, approaching deadlines, and high-priority tasks, helping you take timely action.

With instant alerts, you can quickly respond to maintenance needs and stay on top of essential updates.

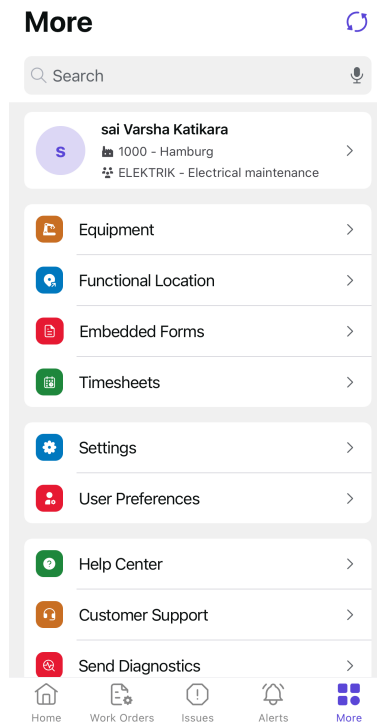
Figure 2-10 Alerts Screen



## 2.2.5. More

The **More** screen provides access to additional features and settings, allowing users to manage their profile, customize preferences, and access support resources. It includes essential tools that enhance functionality and streamline work order management.

Figure 2-11 More Screen





On this screen, you can:

- **Manage Equipment & Locations:** Add and view equipment and functional locations.
- **Fill Out Forms:** Access embedded forms for documentation and reporting.
- **Track Work Hours:** Log time sheets for maintenance activities.
- **Customize Settings:** Adjust user preferences and application settings.
- **Get Support:** Access the Help Center, contact Customer Support, or send diagnostics.













## 2.3. Buttons and Icons in Application

Following are the buttons and icons available in the application:




**Table 2-1 Buttons and Icons**

Button/Icon	Name	Purpose
	Profile	View User Profile.
	Outbox	View pending or failed transactions.

**Table 2-1 Buttons and Icons (continued)**

Button/Icon	Name	Purpose
	Manual Sync	Sync data manually.
	SIA (AI Assistant)	Get online assistance.
	Create	Create work orders and issues.
	Camera	Capture photos and videos while creating a work order and issue.
	Mic	Record voice instructions while creating work orders or issues.
	Enter	Enter the details.
	Add Attachments	Add attachments while executing a work order.
	More (Header)	View and access additional options at header level.
	More	View and access additional options in the middle of the screen.
	Back Arrow	Navigate back to the previous screen.
	Scan	Scan the QR Code to get the equipment or functional location details.
	Add	Add operations, components, permits, and forms.
	Measuring Point	View measuring point details of the work order.

**Table 2-1 Buttons and Icons (continued)**

Button/Icon	Name	Purpose
	Hierarchy	View the equipment or functional location hierarchy.
	Search	Search for records in the modules.
	Chat	Send messages, share files, and tag team members.

## 3. View Push Notifications

Push notifications are instant alerts that keep you updated about the Issues assigned to you, task progress or status changes, actions taken by teammates and any updates related to work. These real-time notifications help you respond quickly to critical tasks, improving communication and reducing delays.

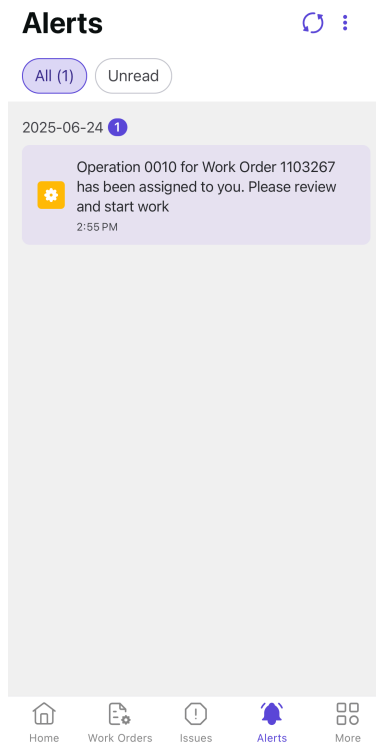
For example, if a pump's vibration crosses the 10 mm/s safety threshold at 11 p.m., the your device gets an instant alert. You can act on it right away—either slow down the machine or schedule a repair before failure occurs. This quick response prevents breakdowns, reduces repair time, and helps lower MTTR (Mean Time to Repair).



iMaintenance recommends you to check notifications the moment they flash on your device.

To check notifications:

1. Navigate to the **Alerts** screen.

Figure 3-1 Alerts Screen



2. Tap **All** to view all the alerts.
3. Tap **Unread** to view only unread alerts.
4. Tap the More  icon on the top-right corner and select **Mark all as Read** to mark as read.
5. Tap the More  icon on the top-right corner and select **Clear All** to clear the alerts.



**Note:**

If no new alerts are available, a message stating **No New Alerts** appears.



## 4. Search and Filter Records

Search and filters help you to find the relevant work orders, issues, operations, functional locations, and equipment quickly based on specific criteria.

### Search Records

Search functionality helps you to find the specific information quickly and easily.

To search records:

1. Navigate to the **Work Orders**, **Operations**, **Issues**, or **More** screen.


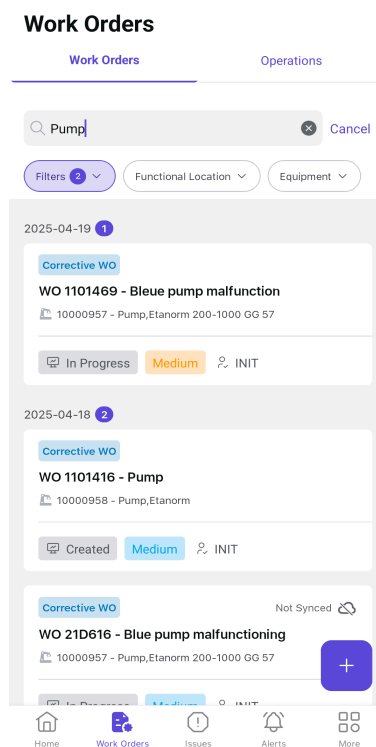
2. Enter the keyword in the Search  bar.

Figure 4-1 Search Records



The search results are displayed.

### Filter Records

Filter functionality helps you to refine and display specific data based on selected criteria such as status, priority, or assigned personnel.

To filter records:

1. Navigate to the **Work Orders, Issues, Alerts, or More** screen.
2. Tap **Filters** below the search bar.
3. In the **Filters** screen,
  - a. In the **Sort By** section, choose **Latest on Top** or **Oldest on Top** radio button.
  - b. In the **Status** section, select the checkboxes for relevant statuses, such as:
    - Open
    - Not Started
    - On-Hold
    - Partial Confirm
    - In Progress
    - Completed
  - c. In the **Priority** section, select the desired levels:
    - Very High
    - High
    - Medium
    - Low
  - d. In the **More Filters** section,
    - Tap on options such as Work Center, Functional Location, or Assigned to and select specific criteria.
4. Once all required filters are selected, tap on **Apply Filters** to update the records list.

If you want to save the selected filters for future use, tap **Save Selection** before exit.

If you need to clear all selected filters, tap the **Reset** button.

Figure 4-2 Filter Records

Cancel Filters Reset

Sort By

☒ Latest on Top

☐ Oldest on Top

Status

☐ Created

☐ Released

☐ In Progress

☐ Completed

☐ Closed

Priority

☐ Extreme Risk

☐ High

☒ Medium

☐ Low

☐ Negligible

Show Only

☐ Breakdown

☐ Assigned to me

Save Selection Apply Filters

Tap **Cancel** if you do not wish to apply any changes and return to the previous screen.

## 5. Access Work Orders and Issues Quickly with Smart Sync

Optimizing your data sync settings helps you access relevant work orders and issues quickly while improving app performance. By selecting your plant and defining a sync period, you ensure that only necessary data is loaded, reducing unnecessary processing time and keeping information up to date.

To set your data sync preferences:

1. Navigate to the **More** screen and select **User Preferences**.
2. To select the **Plant**,
  - Under **Global Data**, choose your **Planning Plant** and **Maintenance Plant** from the available options.
  - View key details, including your **Main Work Center**.
3. To define **Data Sync Period**,

- In the **Transactional Data** section, adjust the **Sync Period** settings.
- Enter the number of days for **Last** and **Next** to define how far back and ahead data should sync.



**Note:**

Data syncs only within the specified range from the current date, ensuring faster updates.

4. Tap **Save**.

Figure 5-1 User Preferences

← User Preferences Reset

Search

**Global Data**

Plant  
1000 - Hamburg

Planning Plant  
-

Maintenance Plant  
-

Main Work Center  
ELEKTRIK - 10000120

**Transactional Data**

Work Orders

Sync Period

Last 8 days To Next 8 days

ⓘ Data syncs within a set range from the current date

Issues

Sync Period

Last 7 days To Next 7 days

ⓘ Data syncs within a set range from the current date

Save

By fine-tuning these settings, you enhance system responsiveness and ensure that only relevant data is available, leading to a smoother, more efficient user experience.

## 5.1. Use Application in Offline Mode

The application is designed to work seamlessly even when your device is not connected to the internet.

- The app automatically switches to offline mode when network connectivity is lost.
- You can continue using all core features—including viewing work orders, entering data, and capturing issues—just like in online mode.
- Any data entered in offline mode is stored locally on your device.
- Once your device reconnects to the internet, the app will automatically sync the offline data to the SAP server.

The application automatically switches to offline mode when your device loses network connectivity, allowing you to continue working as in online mode. Any changes made in offline mode are saved locally and sync automatically to the server once the device reconnects.



**Note:**

The AI Assistant is unavailable in offline mode.

## Sync Data Before Entering Low-Connectivity Areas

Before heading to locations with poor or no internet access, tap the Manual Sync



icon on the Home screen to manually sync your mobile app.

This ensures that:

- All your unsynced entries (from the Outbox) are sent to the backend.
- The latest updates from the backend — such as new assignments or master data—are downloaded to your device.

By syncing in advance, you'll have the most up-to-date information available, and any work you do offline will be ready to sync once you're reconnected.

How the Sync Works:

- **Outbox data is uploaded:** Pending submissions like completed forms, issues, or work orders are sent to the backend.
- **New data is downloaded:** Recent changes from the backend system are pulled into your app.

**Tip:** Make it a habit to tap **Sync** before you start your workday or travel to offline zones.

## 6. Review Raised Equipment Issues

Reviewing reported issues promptly helps assess their urgency and impact on operations. Key details—such as description, priority, and status—help determine the appropriate course of action and prevent machinery breakdowns.

If additional information is needed, request further observations from technicians, such as sensor readings or supporting documents.

Based on your review, you can:

- Release the issue, convert it into a work order, and assign it to the technicians.
- Reject the issue if it has no operational impact (for example, vibration is within acceptable limits), providing a valid reason and informing the technician.

Efficient issue review ensures that critical problems are addressed while minimizing unnecessary work,

### 6.1. Release and Convert Issues into Work Orders

If an issue requires action, release it, convert it into a Work Order, and assign it to a technician. This procedure ensures that necessary maintenance tasks are documented, prioritized, and addressed efficiently. Depending on the nature of the issue, you can either assign a technician immediately for urgent cases or create a detailed work order for planned corrective maintenance.

To release and convert issues into work order:

1. Navigate to the **Issues** screen.
2. Open the issue.
3. Review the details under different sections, such as Attachments, Items, Causes, Activities, and Tasks.
4. Tap **Release**.



**Note:**

You can tap the More





icon and select **Mark as Complete** and add comments and attachments to complete the issue.

Figure 6-1 Release Issue

< Back
⋮

**Motor Damage from Rust**

IS 10048485
Open

Priority <b>High</b>	Consequences -	Likelihood -
-------------------------	-------------------	-----------------

**Issue Title**  
Motor Damage from Rust

**Issue Description**  
\* 26.06.2025 07:53:50 UTC: MWORKORDER1 (MWORKORDER1) \* The motor has suffered damage due to rust, potentially causing malfunction or failure.

**Functional Location**  
8501  
Barrick Gold US  
[Show Functional Location History](#)

**Equipment**  
10143307  
Test  
[Show Equipment History](#)

**Issue Type**  
M1

Reject Issue
Release

5. Tap **Convert to Work Order** at the bottom.



Figure 6-2 Convert to Work Order

← Edit

Measuring Point ID '7588FE' out of thres

IS 10045182 Released Breakdown

Priority	Consequences	Likelihood
Extreme Risk	Catastrophic	Almost Certain

**Description**  
The recorded value for Measuring Point ID '7588FE' has exceeded the defined threshold

**Work Center**  
MECHANIK  
Fabrication Workshop

**Equipment**  
IE00000-02  
[Show Equipment History](#)

**Functional Location**  
TEST MULTY FLOC5  
BLM-02-PL10-05  
[Show Functional Location History](#)

**Malfunction ended on**  
-

**Created by**  
Siddhi Wadetiwar on 04/21/25, 2:40 PM

Reject Issue Convert to Work Order

## Assign Technician & Release Work Order

This is recommended for Emergency or Breakdown Work Orders that require immediate attention.

1. Select **Assign Technician & Release**.

Figure 6–3 Assign Technician and Release

← Edit

New Issue title rusty pump

IS 10045267 Released Breakdown

Priority	Consequences	Likelihood
Extreme Risk	Catastrophic	Almost Certain

Description  
New Issue title rusty pump

Work Center  
MECHANIK  
Fabrication Workshop

Equipment  
Pump, Etanorm 200-1000 GG 57  
10000957  
[Show Equipment History](#)

Functional Location  
Inlet pump plant - screening plant  
K1-ZPW-2  
[Show Functional Location History](#)

Malfunction started from  
04/22/25, 1:03 PM

Malfunction ended on

Assign Technician & Release

Add Work Order Details

2. Provide the following details:

- **Malfunction Started From** date.
- **Technician** in the **Assign to** field.
- Toggle **Spare Parts Required?** if applicable.

Figure 6-4 Fill Details and Release

The screenshot shows a mobile app interface for creating a new issue. At the top, there's a back arrow and an 'Edit' link. The main title is 'New Issue title rusty pump'. Below it, the issue ID 'IS 10045267' is displayed. The form is divided into three columns: 'Priority' with 'Extreme Risk', 'Consequences' with 'Catastrophic', and 'Likelihood' with 'Almost Certain'. A 'Description' field contains the text 'New Issue title rusty pump'. Below this is a section titled 'Assign Technician & Release' which includes a 'Malfunction started from' date field (4/22/2025), an 'Assign to' dropdown menu (Select Technician), and a 'Spares parts required?' toggle switch. At the bottom is a 'Release' button.

3. Tap **Release** to finalize the work order.

## Add Work Order Details

For non-emergency issues that require corrective action, you can create a proper work order.

1. Select **Add Work Order Details**.

The **powerful generative AI feature of iMaintenance** automatically generates work order details — including operations, components, and permits — based on the issue context.

2. Update work order details as required. For information, see [Create a Work Order \(on page 58\)](#).

## 6.2. Reject Non-Impactful Issues

If an issue requires no action, you can reject it by providing a valid reason.

To reject an issue:

1. In the **Issues** screen, open the issue.
2. Tap the **Reject Issue** button at the bottom.
3. In the **Reject Issue** window, add the reason for rejecting the issue and tap **Reject**.  
A message, *Issue <number> has been successfully marked as rejected*, is displayed.

## 7. Create and Assign Work Orders

Identifying maintenance needs, creating and prioritizing work orders, assigning them to the right technicians, and ensuring timely completion helps you make informed decisions, adjust task assignments when needed, and keep operations running efficiently.

This section provides the tools and processes needed to manage technician workloads, uphold safety standards, and ensure on-time task completion — all from a single, mobile-first platform.

### Understand a Work Order

A **Work Order** is a formal request for maintenance, repair, or inspection of equipment. It includes:

- Task details and instructions
- Assigned technicians
- Progress tracking from start to finish

Work Orders help organize maintenance work so tasks are clearly defined, assigned to the right person, and completed without delays.

#### Create Work Orders Using AI Plan

Work Orders can be created quickly using **AI-assisted input (AI Plan)**. AI Plan suggests:

- Relevant equipment
- Likely operations
- Task descriptions based on your input

You can:

- Type a short prompt (e.g., *“conveyor not running”*)
- Upload a photo of the issue

The system uses this input to auto-fill the Work Order—saving time and reducing errors.

For example, you notice a motor failure. You upload an image and type *“motor not working”*. AI Plan creates a Work Order with the equipment, issue description, and steps for inspection and repair.

This removes the need to fill every field manually or search for templates—especially useful when time is critical.

### Why Work Orders Matter

Work Orders make maintenance smoother and more reliable by helping with:

- **Clear Task Assignment** – Everyone knows what needs to be done and who's doing it
- **Efficient Workflow** – Tracks tasks from start to finish without anything slipping through
- **Better Accountability** – Supervisors can monitor work progress and technician performance
- **Less Downtime** – Urgent tasks are prioritized, and routine maintenance stays on track

### Sample Work Order Breakdown

Here's an example of a Work Order for a **malfunctioning conveyor belt**:


- **Issue Description:** Conveyor belt not moving due to motor failure
- **Assigned Technicians:**
  - Electrician (for motor repair)
  - Mechanic (for belt inspection)
- **Operations:**
  - Electrical Check: Test motor circuits and replace faulty parts
  - Mechanical Inspection: Check belt tension and rollers
  - Final Testing: Restart the conveyor and confirm it's running properly
- **Priority Level:** High, due to production delay
- **Completion Status:** Technicians update the Work Order with actions taken, materials used, and results

By structuring maintenance work through Work Orders, your team can reduce downtime, keep things organized, and complete tasks more efficiently.

## 7.1. Create a Work Order


To create a work order:

1. Navigate to the **Work Orders** screen.

2. Tap the Create  icon on the bottom-right of the screen.

3. In the **Create Work Order** screen, you can describe the issue using one of the following methods:

- **Type a Prompt:** Enter key details like equipment, functional location, and severity into the text box.

- **Use the Camera:** Tap the Camera  icon to capture or upload a photo of the issue. The system uses the image to identify the problem and suggest relevant fields.


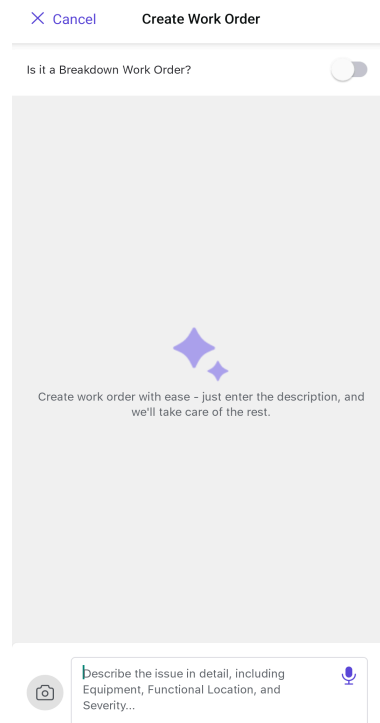
- **Use Voice Input:** Tap the Mic  icon and speak your description. The system records and analyzes your input to auto-fill details using AI.

Figure 7-1 Create Work Order



**Note:**

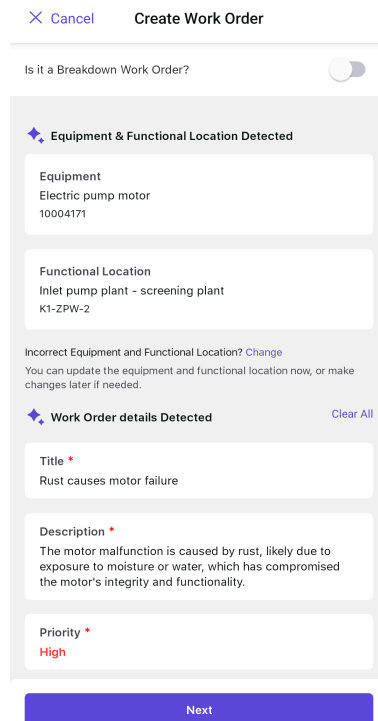
Switch **Is it a Breakdown Work Order?** toggle if it is an emergency work order.

4. Tap the Enter  icon.

The AI assistant (AI Plan) uses your input to suggest the right equipment, identify likely root causes, and recommend appropriate operations—helping you create Work Orders faster and more accurately, even in urgent situations.

**Tip:** You can review and adjust the AI-suggested details before saving the Work Order.

Figure 7-2 AI Generated Work Order Details



The screenshot shows a mobile app interface for creating a work order. At the top, there are 'Cancel' and 'Create Work Order' buttons. Below is a toggle switch for 'Is it a Breakdown Work Order?'. The main section is titled 'Equipment & Functional Location Detected' and contains two input fields: 'Equipment' with the value 'Electric pump motor 10004171' and 'Functional Location' with the value 'Inlet pump plant - screening plant K1-ZPW-2'. Below these fields is a link 'Incorrect Equipment and Functional Location? Change' and a note: 'You can update the equipment and functional location now, or make changes later if needed.' The next section is 'Work Order details Detected' with a 'Clear All' link. It contains three input fields: 'Title' with the value 'Rust causes motor failure', 'Description' with the value 'The motor malfunction is caused by rust, likely due to exposure to moisture or water, which has compromised the motor's integrity and functionality.', and 'Priority' with the value 'High'. At the bottom is a 'Next' button.

- **Equipment:** The machine or equipment in need of maintenance or repair.
- **Functional Location:** The area where the equipment is located.



**Note:**

To change the Equipment and Functional Location details, tap **Change**.

- **Title:** Title or a brief description of the work order.



- **Description:** A detailed explanation of the work order.
- **User Status:** Tap to change the status of the work order. For example, INIT, APPR, RJEC, CLSD, and so on.
- **Priority:** The urgency of the work order.



**Note:**

To change the Work Order details, tap **Update Details**.

5. To change priority, tap on **Priority**.



**Note:**

Tap the **References** link below the Priority to view the information the AI used to determine the priority.

Figure 7-3 Update Priority

← Priority Determination

Priority is determined based on the risk matrix

▼ People Risk Level : High

What is the potential impact on people in the event of this risk materializing? Moderate

What is the likelihood of this risk occurring? Likely

Risk Level : High

> Asset Risk Level : High

> Likelihood Risk Level : High

> Environment Risk Level : High

Overall Priority : High

Done

6. In the **Priority Determination** (risk assessment) screen, assess the risk level by selecting the likely impact in each category:

- a. **People:** Impact of the issue on worker safety.
- b. **Assets:** Potential damage to equipment.
- c. **Likelihood:** How likely the issue is to occur.
- d. **Environmental:** Impact on surroundings or compliance.
- e. Based on your selections, the AI automatically calculates the **Overall Priority** as **Low, Medium, or High Risk**.
- f. Tap **Done**.

The system automatically assesses the risk associated with each issue and assigns a risk level to the corresponding work order. This ensures that high-priority problems are addressed promptly and appropriately.

For example, if a valve leak poses a significant threat to nearby equipment and has a high likelihood of recurring, the system flags it as a **High Risk** work order. This prompts the planner to immediately dispatch a technician—preventing potential safety incidents or unplanned shutdowns.

This automated risk ranking:

- Prioritizes critical issues based on real-time conditions.
- Helps maintenance teams focus on high-impact tasks.
- Minimizes downtime and safety risks.

In addition, the system intelligently selects **relevant operations** based on the severity level of the issue, reducing manual input and accelerating the Work Order creation process.



**Note:**

You can use the **chat** feature within the Work Order details screen to send messages, share files, and tag team members in real time. It supports **notifications** and **automatic updates**, making collaboration and tracking more efficient.

### 7.1.1. Add Operations

An **operation** is a specific task or step within a Work Order that must be completed as part of maintenance or repair work. Instead of assigning the entire Work Order to a single technician, Operations helps divide a work order into logical units based on the nature of the work and assigns each operation to a technician based on expertise.

Operations help with the following:

- **Better Task Distribution:** Supervisors can assign different operations to technicians based on their expertise.
- **Faster Completion:** Splitting a work order into multiple operations ensures work progresses simultaneously, reducing downtime.
- **Flexibility:** Operations can be reassigned to other technicians in case of emergencies or technician unavailability.

A Work Order for servicing an industrial pump could be divided into the following multiple operations:

1. **Electrical Check (Assigned to an Electrician):** Inspect wiring, check motor connections, and test voltage levels.
2. **Mechanical Inspection (Assigned to a Mechanic):** Check for leaks, inspect seals, and ensure the pump's alignment.
3. **Lubrication (Assigned to a Maintenance Technician):** Apply lubricants to bearings and moving parts.
4. **Final Testing (Assigned to a Supervisor or Senior Technician):** Run the pump, check performance, and approve completion.

Each technician works on their assigned operation, ensuring the job is completed efficiently and correctly. If an emergency arises (for example, the electrician is unavailable), their operation can be reassigned to another qualified electrician.

Not all operations within a work order require a technician to be assigned individually. Even if no technician is assigned at the **operation level**, the person assigned to the **overall work order** can still review and confirm those operations.

This allows flexibility in execution—especially when certain steps don't require a specialist or when the work order is handled end-to-end by a single technician.

To add operations to the work order:


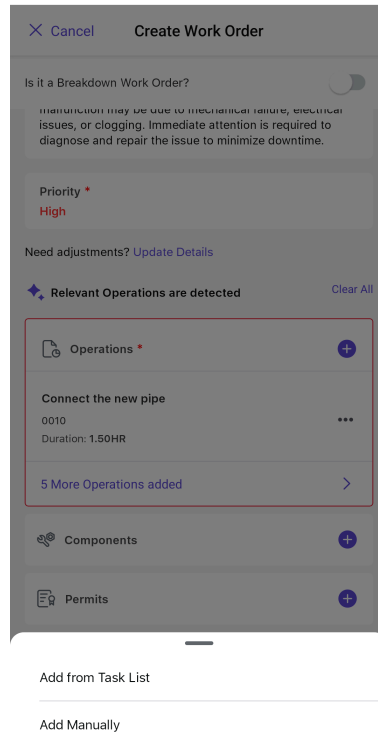
1. In the **Operations** section, tap the Add  icon.  
A pop-up is displayed with the following options:
  - **Add Task from Task List**
  - **Add Manually**

Figure 7-4 Add Operations



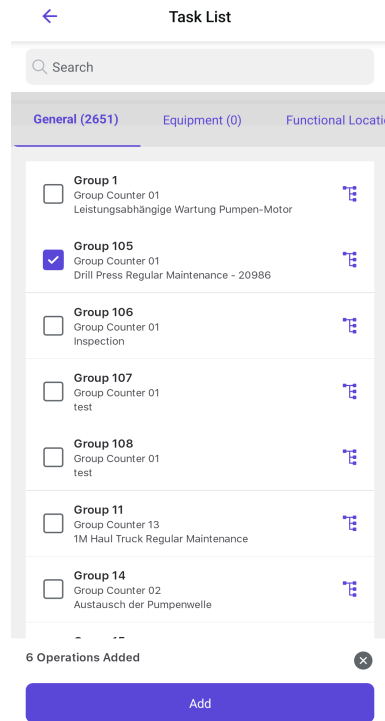
2. If you select **Add Task from Task List**, do the following:
  - a. Choose the relevant operation from the list in the **General, Equipments**, or **Functional Locations** tab.



**Note:**

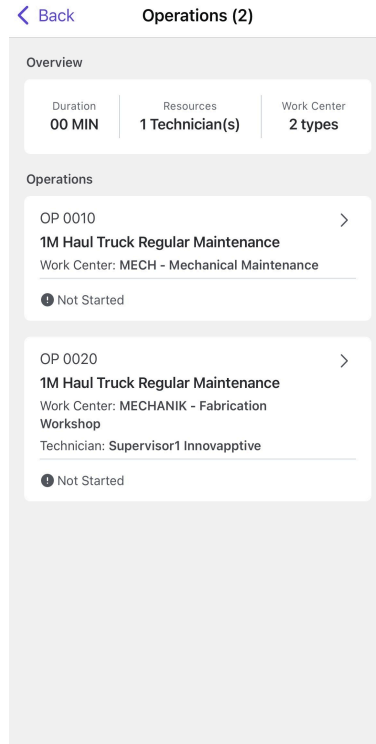
- Tabs are only displayed if they contain operations.
- If a tab (General, Equipment, or Functional Location) has no operations, it is hidden.
- If **none** of the tabs have operations, the entire section is hidden and the following message is shown: *"No Operations are present in the tasklist."*

Figure 7-5 Add Operations From Task List



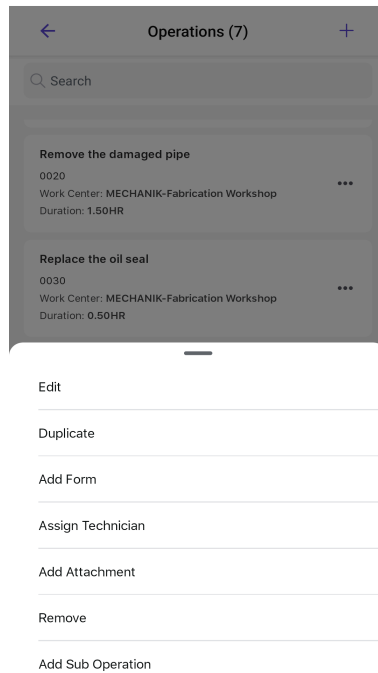
- b. Tap the **Add** button.
- c. In the **Operations** screen, you can view the list of operations.

Figure 7-6 Operations Screen



- d. To modify details, tap the More  icon next to the operation and select **Edit**.

Figure 7-7 More Options



e. In the **Operation Details** screen, you can modify the following details:

- Description
- Planning Plant
- Work Center
- Control Key
- Plant
- Activity Type
- Number of Resources

- Duration
- Work
- Equipment
- Functional Location

Figure 7-8 Edit Operation Details

× Cancel    Operation Details

Operation Number  
0080

Description \*  
Repair Pump

Planning Plant  
1000  
Hamburg


Work Center \*  
MECHANIK  
Fabrication Workshop

Control Key \*  
ZREL

Save

f. Tap **Save**.

g. Once all the operation details are filled in, tap **Done**.

In the **Operations** screen, you can tap the More  icon and select,

- **Duplicate** to duplicate the operation.
- **Add Form** to add forms from the list.
- **Assign Technician** to assign the technician.
- **Add Attachment** to add relevant attachments such as images, videos, and documents.
- **Remove** to delete the operation.
- **Add Sub Operation** to add a sub-operation.

3. If you select **Add Manually**, do the following:

a. In the **Operation Details** screen, fill in the details and tap **Save**.



## 7.1.2. Add Sub-Operations

A **sub-operation** is a smaller, detailed task within a larger operation of a Work Order. Sub-operations help break down complex maintenance tasks into manageable steps, ensuring that each aspect of the job is properly executed and tracked.

A **Work Order for overhauling an industrial air compressor** can contain the following sub-operations:

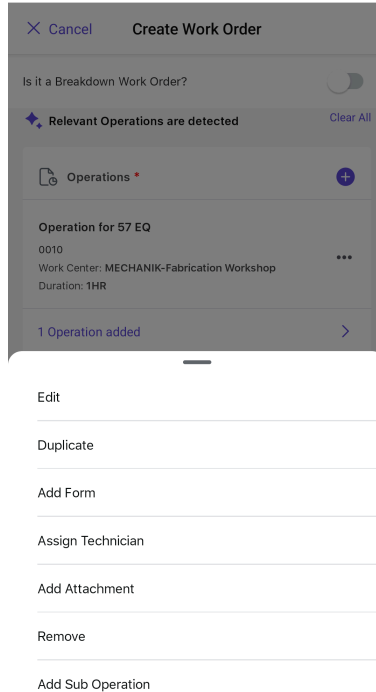
1. **Operation: Dismantle the Compressor**
  - **Sub-Operation 1:** Remove external covers and panels.
  - **Sub-Operation 2:** Disconnect electrical connections.
  - **Sub-Operation 3:** Detach motor and compressor unit.
2. **Operation: Inspect and Service Components**
  - **Sub-Operation 1:** Check bearings for wear.
  - **Sub-Operation 2:** Inspect and replace seals.
  - **Sub-Operation 3:** Clean and lubricate moving parts.
3. **Operation: Reassemble and Testing**
  - **Sub-Operation 1:** Check bearings for wear.
  - **Sub-Operation 2:** Inspect and replace seals.
  - **Sub-Operation 3:** Clean and lubricate moving parts.

By adding sub-operations, Work Orders become more structured, making complex maintenance tasks easier to manage, execute, and track efficiently.

To add sub-operations:

1. In the **Operations** section, tap the More  icon next to the operation and select **Add Sub Operation**.

Figure 7-9 Add Sub Operation



2. In the **Operation Details** screen, fill in the details and tap **Save**. For more information, see [Add Operations \(on page 62\)](#).

### 7.1.3. Add Components


In many maintenance tasks, **components** such as spare parts, tools, and consumables are required to complete a work order. Adding components ensures technicians have the necessary materials before starting the job, reducing delays and improving efficiency.

Adding **Components** in a Work Order:

- **Ensures Availability:** Helps technicians get the right parts before starting work.
- **Reduces Downtime:** Prevents delays caused by missing or incorrect components.
- **Improves Tracking:** Logs use components for better inventory management.
- **Enhances Accuracy:** Ensures the correct materials are allocated to the right task.

By adding components in advance, maintenance tasks become more efficient, reducing the risk of missing parts and unplanned delays.

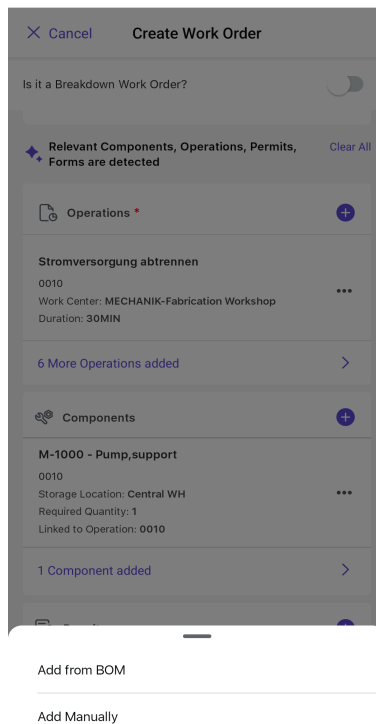
To add components to the work order:

1. In the **Components** section, tap the Add  icon on the right side.

A pop-up is displayed with the following options:

- **Add from BOM (Bill of Materials)**
- **Add Manually**

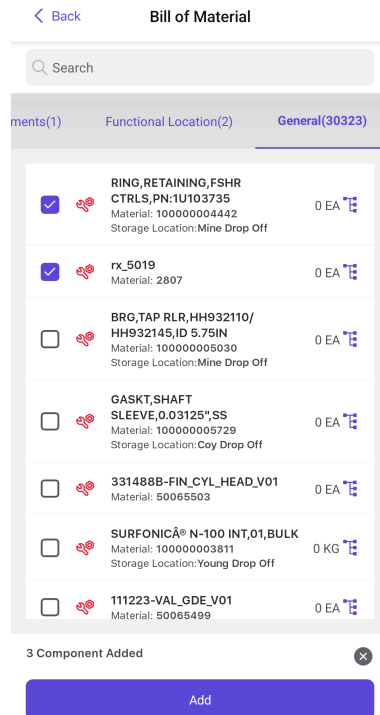
Figure 7-10 Add Components



2. If you select **Add from BOM**, do the following:

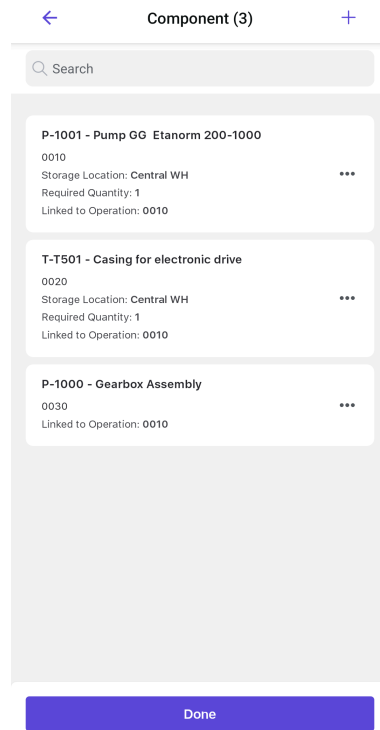
- a. Choose the relevant components from the list in the **General, Equipments**, or **Functional Locations** tab.

Figure 7-11 Select Components from BOM



- b. Tap the **Add** button.
- c. In the **Components** screen, you can view the list of components.

Figure 7-12 Components Screen




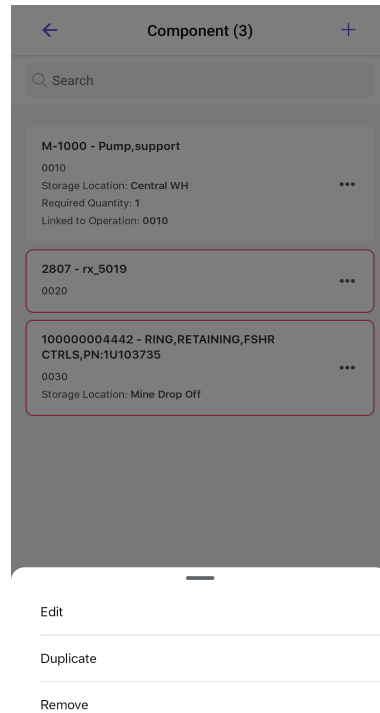
- d. Tap the More  icon next to the component and select **Edit**.

Figure 7-13 More Options



e. In the **Component Details** screen, you can change the following details:

- Required Quantity
- Material



**Note:**

You can scan the barcode or the QR code next to the material to automatically populate the Material Number and Description.

- Category
- Operation Number



**Note:**

The Operation Number gets displayed automatically if the work order contains only one operation.

Figure 7-14 Edit Component Details

✕ Cancel    Component Details

▼ Section 1

Material Number  
0020

Material \*  
2807  
rx\_5019

Link to Operation \*  
0040  
Block the pipe


Unit of Measurement  
EA  
Each

Storage Location

Save

f. Tap **Save**.

g. Once all the component details are filled in, tap **Done**.

In the **Components** screen, you can tap the More  icon and select,

- **Duplicate** to duplicate the component.
- **Remove** to delete the component.

3. If you select **Add Manually**, do the following:

a. In the **Component Details** screen, fill in the details and tap **Save**.

### 7.1.4. Add Permits

Permits play a critical role in maintenance and asset management by ensuring that necessary **safety measures** are followed before starting work. Attaching permits to work orders helps technicians understand and implement required precautions, reducing risks and maintaining compliance with safety regulations.

Adding **Permits** in a Work Order:

- **Ensures Workplace Safety:** Identifies hazards and mandates safety protocols.
- **Regulatory Compliance:** Helps meet legal and company safety requirements.
- **Prevents Accidents:** Ensures proper precautions are taken before maintenance begins.
- **Standardized Safety Procedures:** Provides clear safety guidelines for technicians.

A **Work Order for servicing an industrial compressor**, can have the following permits:

1. **Hazard Identification:** High-pressure system, electrical risks, and moving parts.
2. **Safety Requirements:**
  - **Isolation Procedures:** Shut down and disconnect power sources.
  - **Lockout/Tagout (LOTO):** Prevent accidental reactivation.
  - **Personal Protective Equipment (PPE):** Gloves, safety goggles, and ear protection.
3. **Approval Process:** Supervisor reviews and authorizes the permit before work begins.
4. **Compliance Check:** Technician follows safety steps and logs completion.

By adding permits, Work Orders ensure that **maintenance is performed safely, risks are minimized, and all safety protocols are properly followed.**

To add permits to the work order:




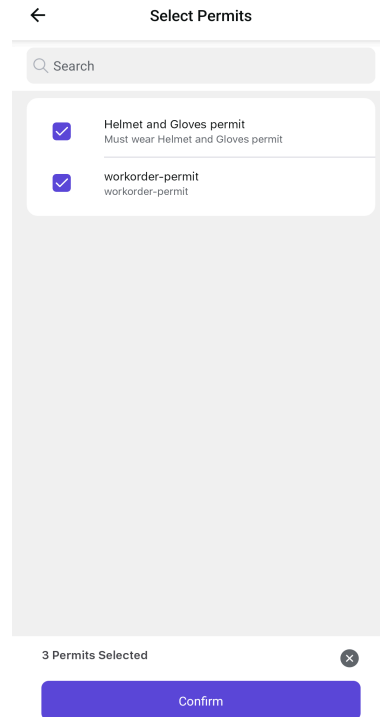
1. In the **Permits** section, tap the Add  icon on the right side.
2. In the **Select Permits** screen, select the relevant permit and tap **Confirm**.

Figure 7-15 Add Permits



In the **Permits** screen, you can tap the More  icon and select,

- **Duplicate** to duplicate the permit.
- **Remove** to delete the permit.

### 7.1.5. Add Forms

Forms play a crucial role in ensuring that maintenance tasks are completed accurately, safely, and in compliance with regulations. By attaching **standalone forms**—such as checklists, emergency inspection reports, and risk assessment forms—to Work Orders, Supervisors can standardize data collection and improve record-keeping.

**Forms** help with the following:

- **Standardized Data Collection:** Ensures all necessary details are captured consistently.
- **Improved Compliance:** Helps meet safety and regulatory requirements.
- **Enhanced Accuracy:** Reduces errors by guiding technicians through predefined steps.
- **Better Documentation:** Maintains a clear record of inspections, risks, and completed tasks.

A **Work Order for servicing a high-voltage electrical panel** can contain the following forms:

1. **Pre-Maintenance Safety Checklist:** Confirms safety precautions (for example, power shutoff, PPE usage).
2. **Emergency Inspection Form:** Documents any unexpected hazards found during the service.
3. **Risk Assessment Form:** Evaluates potential risks and necessary mitigation measures.

By adding forms, Work Orders become more structured, improving safety, accuracy, and overall maintenance quality.



**Note:**

Forms are automatically assigned to Work Orders based on Equipment, Functional Location, Task List, Maintenance Plan, or Order Type.

To add forms to the work order:


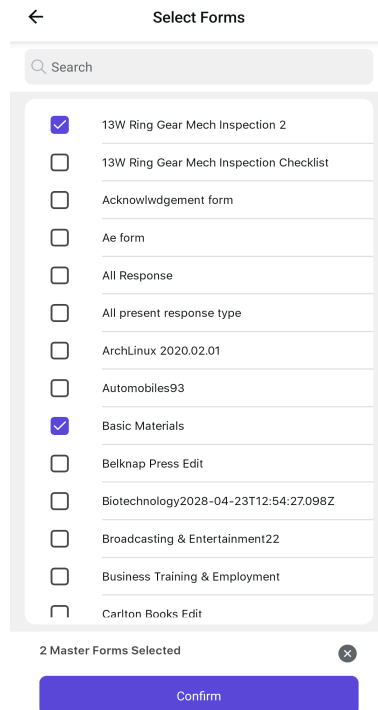

1. In the **Forms** section, tap the Add  icon on the right side.
2. In the **Select Forms** screen, select the relevant form and tap **Confirm**.

Figure 7-16 Add Forms



In the **Forms** screen, you can tap the More  icon and select,

- **Duplicate** to duplicate the form.
- **Remove** to delete the form.

## 7.2. Create a Sub Work Order

Create Sub-Work Orders directly from an existing parent work order, which helps to break down the large work order into small manageable tasks.

To create a sub-workorder:

1. Open the work order.
2. Tap the More



icon on top-right and select **Create Sub-Work Order**.

3. In the Create Sub-Work Order screen, enter the issue details. For more information, see [Create a Work Order \(on page 58\)](#).
4. Tap **Next**.
5. Tap **Review**.
6. Review the details and tap **Create**.

The sub work order is created and you can see it in the **Sub-Work Order** section.

## 7.3. Review and Release the Work Order

To review and release the work order.

1. Tap **Review** to review the details.

Figure 7-17 Review Work Order

The screenshot shows a mobile application interface for creating a work order. At the top, there is a header bar with a blue 'X Cancel' button and the title 'Create Work Order'. Below the header, there is a toggle switch labeled 'Is it a Breakdown Work Order?'. The main form area is divided into several sections: a purple header section with a dropdown arrow and the text 'Work Order'; a 'Title' section with a text input field containing 'Pump malfunction reported'; a 'Work Order Type' section with a dropdown menu showing 'PM02' and a sub-label 'Corrective WO'; an 'Equipment' section with a dropdown menu showing '10000957' and a sub-label 'Pump, Etanorm 200-1000 GG 57'; a 'Priority' section with a dropdown menu showing 'High' and a sub-label 'Priority \*'; and a 'Description' section with a text input field containing 'The industrial pump has stopped functioning properly,'. At the bottom of the form, there is a large blue button labeled 'Review'.

2. Tap **Create** to release and create a work order.


Figure 7-18 Finalize Work Order

The screenshot shows a mobile application interface for creating a work order. At the top, there's a back arrow and the title 'Work Order Details'. Below this is a summary bar with three columns: 'Priority' (High), 'Consequences' (Major), and 'Likelihood' (Likely). The main form contains several sections: 'Title' with the text 'Pump malfunction reported'; 'Description' with a paragraph about a pump malfunction; 'Equipment' with details 'Pump, Etanorm 200-1000 GG 57' and '10000957', plus a link 'Show Equipment History'; 'Functional Location' with 'Inlet pump plant - screening plant' and 'K1-ZPW-2', plus a link 'Show Functional Location History'; 'User Status' with 'INIT' and 'Initial'; and 'Work Center' with 'MECHANIK' and 'Fabrication Workshop'. A large blue 'Create' button is at the bottom.

A success message, *Work Order WO <number> has been created successfully*, displays.



**Note:**

To edit a work order, open the newly created work order, tap the More  icon on the top-right corner and select **Edit Work Order**.

## 7.4. Create a Work Order from Existing One

For recurring maintenance tasks or similar jobs across equipment, you don't need to start from scratch each time. Use the **Duplicate** option to copy an existing work order and create a new one with just a few edits.

This feature helps you:

- Save time by reusing previously entered details.
- Maintain consistency in task planning.
- Reduce manual effort and data entry errors.

To copy a work order from an existing one:

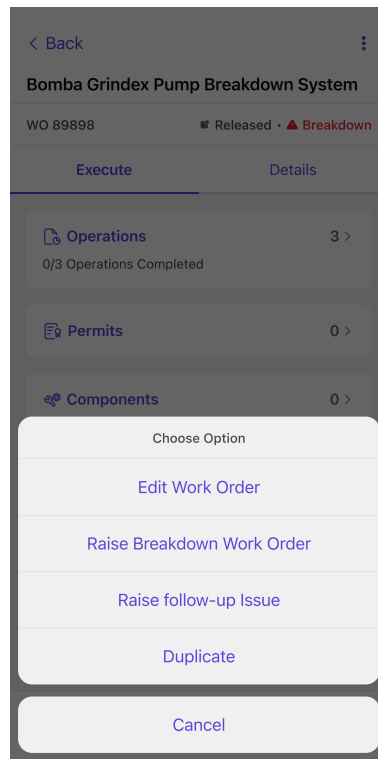
1. Open the work order you want to copy.
2. Tap the More



icon on top-right.

3. In the **Choose Option** window, select **Duplicate**.

Figure 7-19 Duplicate or Copy Work Order



The work order is copied with the same details. Open the duplicated version, make the necessary updates (e.g., equipment, dates, tasks), and save it.

**Tip:** Use this option for preventive maintenance jobs, similar breakdown tasks, or when creating work orders for the same equipment type across multiple locations.

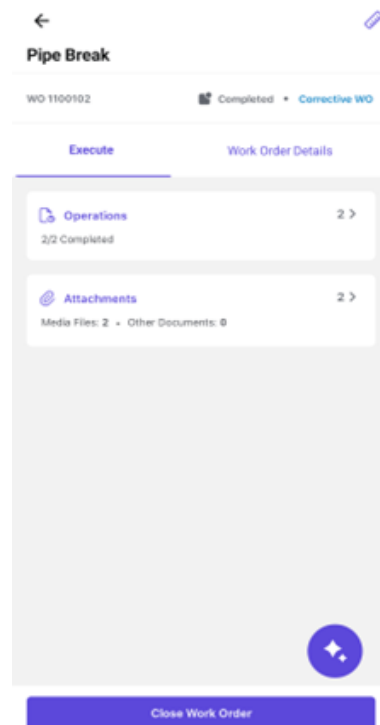
## 8. Close a Work Order

Once you receive the completed work order from a technician, review all the details, including the completed operations, used components, recorded time, and any attached notes or images, and close the work order if no discrepancies are found.

To close a work order:

1. Open the completed or submitted work order.
2. Review the details, such as logs, comments, and supporting attachments, and tap **Close Work Order**.

Figure 8-1 Close Work Order



3. In the **Close Work Order** screen, add notes or attachments, and tap **Close**.  
A message, *Work Order <name> closed successfully*, is displayed, and the status is updated to *Closed*.



## 9. Approve or Reject Timesheets

Timesheets help track the time spent on **Work Order operations**, ensuring accurate labor records and efficient workforce management. Technicians **log your work hours**, including **start and end times, break durations, and total time spent on each task**. This information helps you monitor productivity, manage workloads, and ensure proper allocation of resources.

Timesheets help with the following:

- **Accurate Work Tracking:** Ensures precise recording of hours worked on each task.
- **Improved Resource Management:** Helps you allocate tasks effectively.
- **Fair Compensation:** Ensures Technicians' work hours are correctly logged for payroll or overtime calculations.
- **Operational Efficiency:** Provides insights into job durations and helps optimize work scheduling.

To approve or reject timesheet:

1. Navigate to the **More** screen.
2. Select the **Timesheets** module.
3. In the **Timesheets** screen, select the technician from the list.
4. Choose the timesheet or work log you want to review.
5. Review the submitted details, such as Work Order Number, Work Order Description, Time Logged, and Operation Number.
6. Tap **Approve** to approve the timesheet.

Or

Tap **Reject** to reject it, and provide a **valid reason** for rejection.

Figure 9-1 Timesheet Approval

×

0010 - test

Planned Time 1 Hrs

Comments

+ Add Comments

Reject Log Approve



**Note:**

- If approved, the approval status and approver's name are shown on the timesheet details screen.
- If rejected, the rejection status, comments, and name of the rejecting supervisor are visible on the same screen.
- You can use search and filter options to quickly find specific timesheets.

## 10. Personalize Your App with Theme and Language Options

The Settings section allows you to personalize your experience by adjusting the app's theme and language and enabling push notifications. These options enhance visibility and usability, ensuring a seamless experience tailored to your needs.

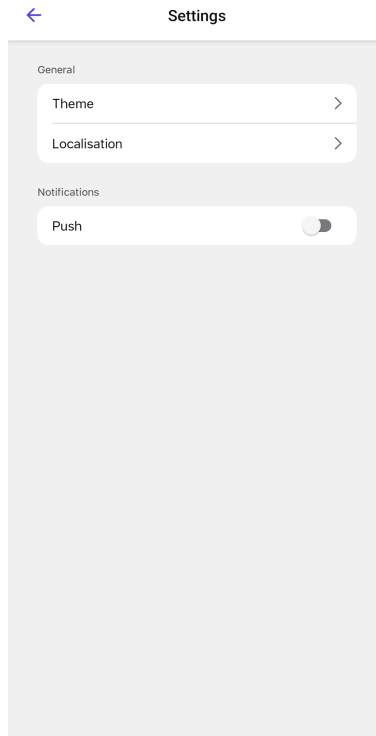
### Switch between Dark and Light Modes

For optimal visibility, especially in different lighting conditions, you can switch between Dark and Light modes.

To change the mode or theme:

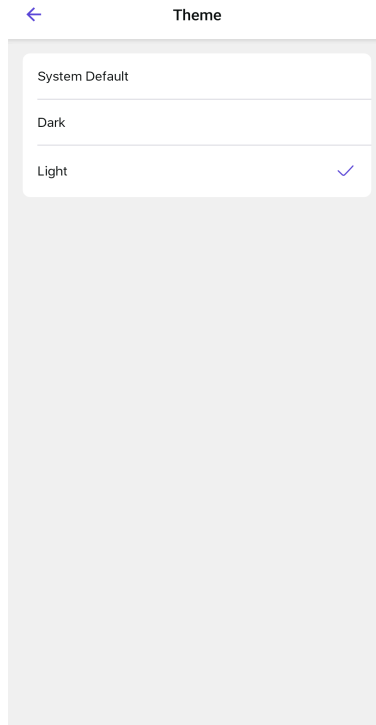
1. Navigate to the **More** screen and open **Settings**.

Figure 10-1 Settings Screen



2. Tap **Theme** and select the following preferred mode:

Figure 10-2 Themes Screen



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

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

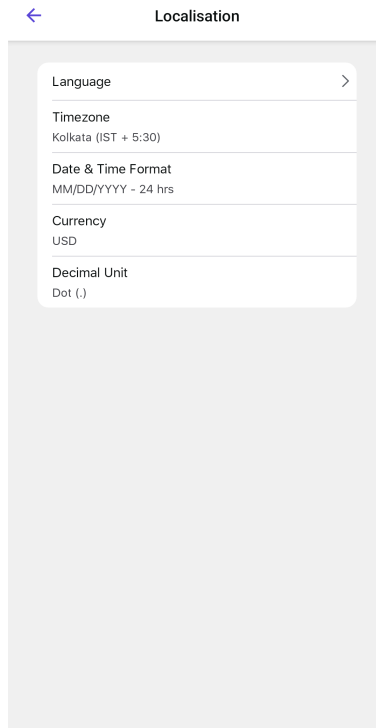
## Choose Language

Configure the menu items (labels and messages) to display in your preferred language.

To choose the language of your choice:

1. Navigate to the **More** screen and open **Settings**.
2. Tap **Localization** and select the **Language** of your choice.

Figure 10–3 Localization Screen



3. In **Localization** screen,
  - Time zone, Date and Time Format, Currency, and Decimal Unit updates based on the selected language.

The labels and messages appear in the selected language.

## 11. View Equipment Details

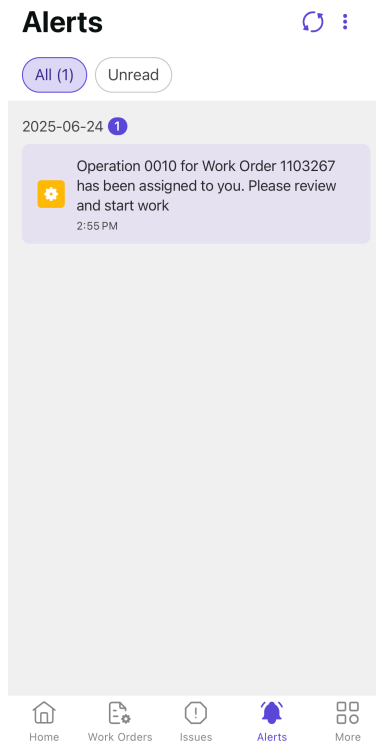
**Equipment** refers to any machine or physical asset that requires regular maintenance, inspection, or repair to keep it running safely and efficiently. This can include industrial machinery, tools, and infrastructure used across various industries. Regular maintenance helps prevent breakdowns, improve performance, and meet safety and compliance standards.

The **Equipment module** in the app gives you key information about each asset—such as its current status, maintenance history, and performance metrics. Viewing this information helps you make better decisions, report issues quickly, and manage maintenance more effectively.

To view the equipment details:

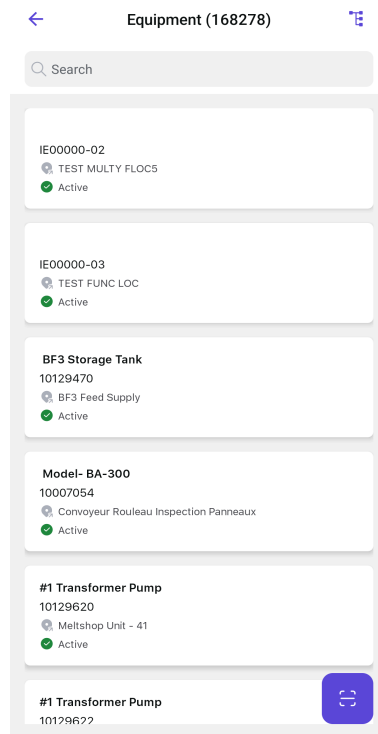
1. Navigate to the **More** screen.

Figure 11-1 Alerts Screen



2. Select the **Equipment** module.
3. Select the Equipment from the list to view details.

Figure 11-2 Equipment Screen



Or

Tap the **Scan** icon at the bottom-right corner and scan the QR code on the equipment.

The scanner reads the code and displays the equipment details.

Once selected, you can explore various tabs for detailed information.

Tap the Hierarchy icon on top-right to view the full structure or hierarchy of the equipment with connected BOMs across all levels. Tap the Up Arrow icon to view the immediate parent and its children, continuing upward until the top-level equipment is reached—at which point the icon is greyed out.

## Dashboard – Monitor Work Orders and Issues

The Dashboard tab in the Equipment module gives you a real-time, centralized view of the asset's condition. It displays:

- Health scores
- Performance trends
- Critical alerts



This information helps you make faster, data-based decisions while performing inspections, repairs, or follow-ups.

**For example**, a rising bearing temperature on a compressor may not trigger an immediate alarm, but the dashboard shows it trending toward the threshold. If it crosses 80 °C, the alert turns red. This allows the supervisor to act quickly and schedule repairs before a breakdown occurs. Early visibility like this helps prevent downtime, extend asset life, and improve equipment reliability.

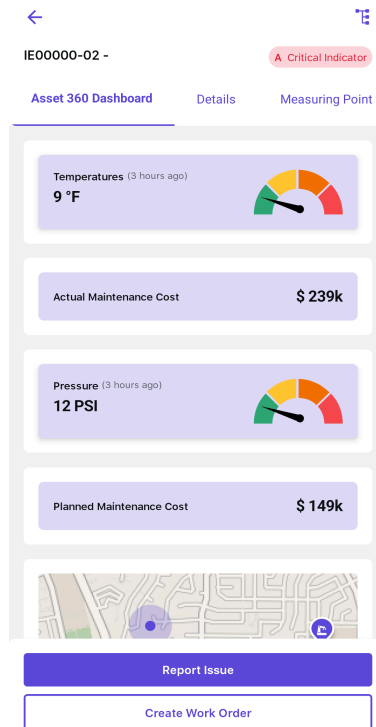
From the Dashboard tab, you can also:

- **View Work Orders and Issues** linked to the equipment.
- **Report an Issue** if you spot something unusual or need an inspection. For more information, see *Create Issues* topic in Technicians user guide.
- **Create a Work Order** directly from the equipment record to start maintenance immediately. For more information, see *Create Work Order* topic in Supervisors user guide.

This makes it easy to track history, respond to issues faster, and link all activity back to the equipment – improving compliance and service traceability.

You can tap **Set Geo Tag** on the top and send location coordinates while creating issues or work orders. This enables AI to suggest the most accurate equipment based on real-time context. If the equipment is already geo-tagged, the Geo Tagged status is displayed.

Figure 11-3 Equipment – Dashboard

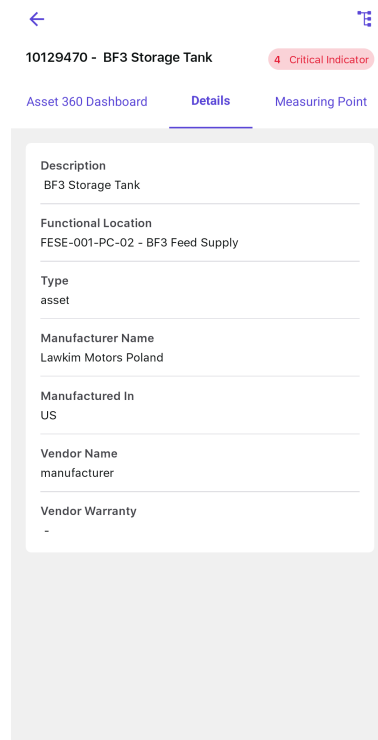


## Details – Access Equipment Information

View key equipment details, including:

- **General:** Displays the overview of the equipment, such as Description, Model Number, and so on.
- **Location:** Location details of the maintenance plant.
- **Organization:** Displays organization details such as Planning Plant, Cost Center, and so on.
- **Structure:** Displays the equipment structure details.
- **Classification:** Displays the classification details.
- **Warranty:** Displays warranty details.
- **Partner:** Displays partner details.
- **Attachments:** Displays DMS related documents associated with the equipment.

Figure 11-4 Equipment – Details



## History – Track Equipment Maintenance

- **Review past work orders** and maintenance activities.
- **Identify critical issues.**
- **Verify work order status** before performing new maintenance tasks.

## Measuring Point – Monitor Performance Metrics

The Measuring Points tab is available in the following sections:

- Equipment
- Functional Location
- Work Orders
- Work Order Operations

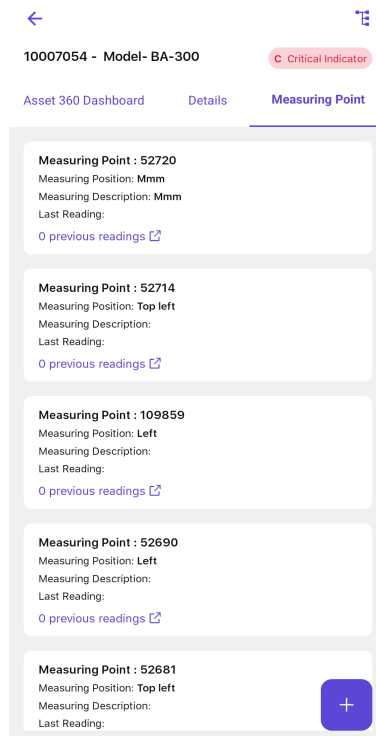


### Note:

The Measuring Points tab is only visible if the MP (Measuring Point) module is enabled in the tenant-level settings. If disabled, the tab will not appear in any of the above sections.

- View measuring points with details such as:
  - Measuring Point ID, Position, Description, Last Reading, and Previous Readings Count.
- **Tap the reading link** to review previous readings.
- **Take a New Reading** by selecting **Take Reading** in the **Reading** screen.
- **Add a New Measuring Point** by tapping the **Add** icon. For more information, see [Create a Measuring Point \(on page 96\)](#).

Figure 11-5 Equipment – Measuring Point



## 11.1. Create a Measuring Point

A Measuring Point is used to track equipment performance and condition over time. It records key measurements that help in monitoring wear, efficiency, and potential failures.

To create a measuring point:


1. Navigate to the **Equipment** module.
2. Select the equipment from the list.
3. In the **Measuring Point** tab, tap the Create  icon at the bottom of the screen.
4. In the **Create Measuring Point** screen, enter the following details:

Figure 11-6 Create Measuring Point

Cancel Create Measuring Point

Basic Information

Object Name  
Equipment

Equipment  
10007054  
Model- BA-300

Descriptions

Measuring Position \*

Measuring Point Category \*

Save

### Basic Information

- **Description:** Provide a name or identifier for the measuring point.
- **Measuring Position:** Specify the location on the equipment.
- **Supporting Media:** Tap the + icon to attach relevant files or images.
- **Measurement Type:** Select the type of measurement from the drop-down.
- **Measuring Date & Time:** Automatically filled with the current system date and time.
- **Code Group:** Choose the appropriate category for classification.
- **Characteristic:** Select the measurement characteristic from the drop-down.
- **Object Category:** Define the asset category for accurate tracking.
- **Counter Measuring Point:** If applicable, enable the **Measuring Point is a Counter?** toggle and enter:



**Note:**

You can enter a Counter Difference to automatically update both the Counter Reading and Total Reading. A visual Difference Indicator is displayed in the Measurement List, which helps you quickly identify incremental changes and gain better insights into measurement trends.

- **Counter Reading** (current value)
- **Annual Estimate** (expected yearly usage)
- **Comments** (additional details)

**Measurement Range**

- **Lower Range and Upper Range Limits:** Define acceptable measurement thresholds.
5. Tap **Save** to finalize and create the measuring point.

This ensures accurate tracking of equipment conditions, aiding in predictive maintenance and operational efficiency.

## 12. View Functional Location Details

A **Functional Location** is a fixed position within a plant, building, or facility where equipment is installed and maintenance tasks are performed. It serves as a reference point for organizing assets, tracking maintenance activities, and managing historical data.

Unlike equipment, which can be moved or replaced, a functional location remains permanent. It helps in:

- Structuring asset management efficiently.
- Streamlining maintenance workflows.
- Ensuring compliance with safety and operational standards.
- Providing a clear reference for work orders and inspections.

By defining functional locations, businesses can improve asset tracking, reduce downtime, and optimize maintenance planning.

To view the Functional Location details:

1. Navigate to the **More** screen.
2. Select the **Functional Location** module.
3. In the **Functional Location** screen, tap the functional location from the list to view details.

Or

Tap the **Scan** icon at the bottom-right corner and scan the QR code on the location. The scanner reads the code and displays the functional location details.

Tap the **Hierarchy** icon in the top-right corner to view the complete structure of the **functional location**, including all connected **equipment** and **BOMs** across multiple levels.

To navigate upward through the hierarchy:

- Tap the **Up Arrow** icon to view the immediate parent and its sibling locations.
- Continue tapping to move upward through each level.
- When you reach the top-level functional location, the icon becomes greyed out, indicating no further parent exists.

## Details – Access Functional Location Information

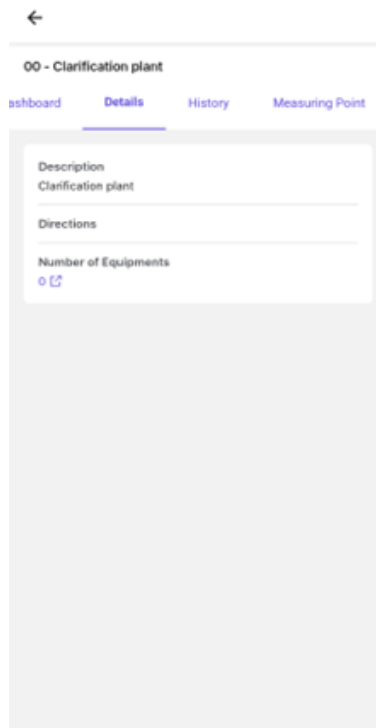
This tab provides key information about the selected functional location, organized under the following sections:

- **General Description:** Shows an overview of the location, including **description**, **model number**, and other relevant details.
- **Attachments (DMS):** Displays **Document Management System (DMS)** files associated with the functional location.
- **Location / Directions:** Shows the **physical location** within the maintenance plant and any **instructions for reaching the site**.
- **Organization:** Displays organizational details such as **Planning Plant**, **Cost Center**, etc.

Tap to view the list of **equipment associated** with this location.

- **Structure:** Provides details about the **location's structural hierarchy**.
- **Classification:** Displays classification details defined for this location.
- **Warranty:** Shows any warranty details associated with the functional location.
- **Partner:** Lists business partners related to this location, if configured.

Figure 12-1 Functional Location – Details





## History – Track Equipment and Maintenance Records

Check past maintenance activities and equipment history:

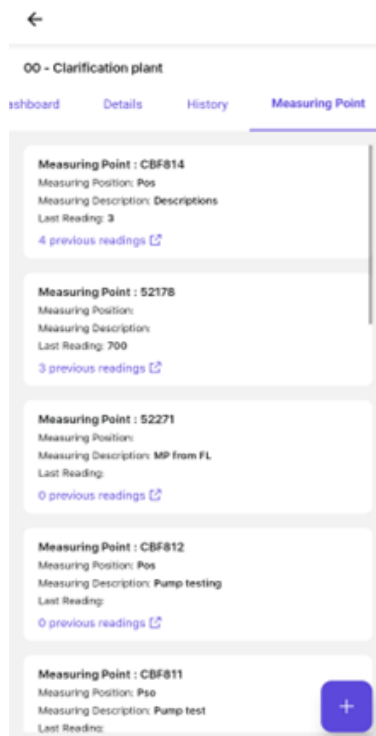
- View previously associated equipment.
- Track maintenance and work order history.

## Measuring Point – Monitor Equipment Performance

This tab helps track performance data and readings from measuring points.

- View measuring points with details such as:
  - **Measuring Point ID**
  - **Measuring Position**
  - **Measuring Description**
  - **Last Reading and Previous Readings Count.**
- Tap the **reading link** to review historical readings.
- Take a new reading by selecting **Take Reading** in the **Reading** screen.
- Add a New Measuring Point by tapping the **Add** icon. For more information, see [Create a Measuring Point \(on page 96\)](#).

Figure 12–2 Functional Location – Measuring Point



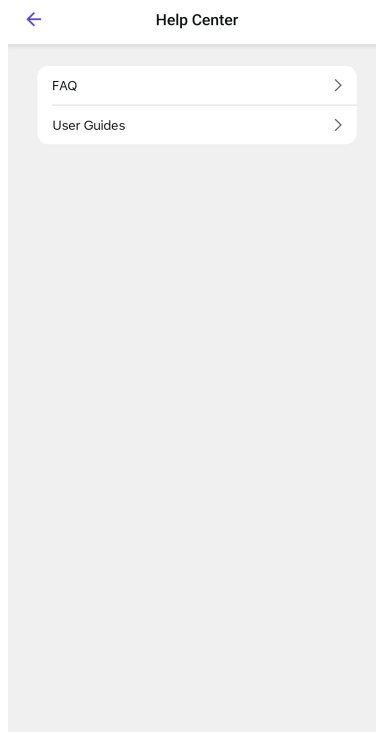
## 13. Access Help Center

The Help Center section provides easy access to FAQs and User Guides to assist you in using the application effectively. Follow the steps below to navigate the Help Center and find the information you need.

To access the Help Center:

1. Navigate to the **More** screen and open the **Help Center**.

Figure 13-1 Help Center



The Help Center provides two main topics:

- **FAQ** – Frequently Asked Questions related to different modules.
  - **User Guides** – Detailed guides on using various features.
2. Tap **FAQ** to view common questions and solutions.
    - Use the search bar at the top to find specific topics.
    - Browse the categories, such as General, Work Orders, Dashboard, Getting Started, and Issues. Tap on a topic to view more details.
  3. Tap **User Guides** to access detailed instructional content.
    - Navigate through guides to learn more about app features.

## 14. View User Profile

To access and view the user profile:

Navigate to the **More** screen and tap on **Profile**.

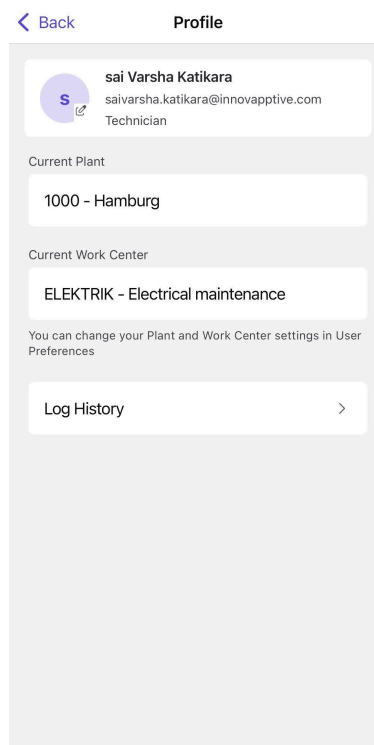
Or

In the **Home** screen, tap the **Profile** icon on the top right corner.

You can view the **Profile** screen with the following details:

- Username
- Email ID
- Role
- Current Plant
- Current Work Center
- Log History

Figure 14-1 User Profile



## 14.1. View Log History

You can monitor real-time activity through the Log History, offering a detailed record of all actions performed during your login session. This log helps provide transparency into system operations and assists in tracking the status of various activities.

To view log history:

1. Navigate to the **Profile** screen.
2. Tap on the **Log History** section.

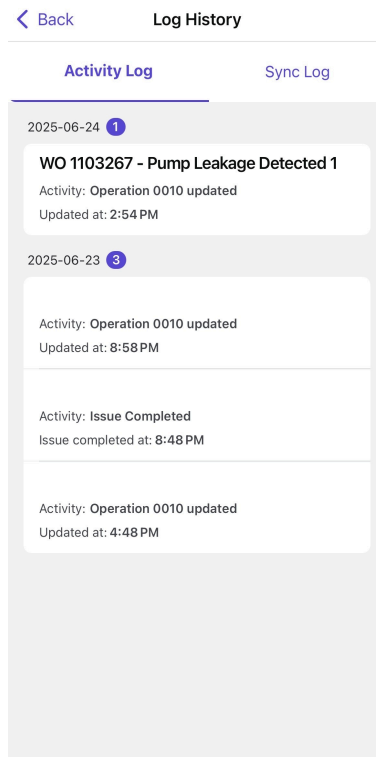
The **Log History** screen has following two tabs:

### **Activity Log**

This tab displays a list of actions performed by the user. Each entry includes the following details:

- **Object ID and Title:** Indicates the specific object related to the activity (e.g., Issue, Work Order, Operation, Measuring Point, Timesheet ID).
- **Activity Performed:** Describes the type of action, such as Create, Update, Release, Delete, or Complete.
- **Timestamp:** Shows the exact time the action occurred.
- **Sync Status:** Reflects the current synchronization state (Not Synced, Sync in Progress, Sync Failed).

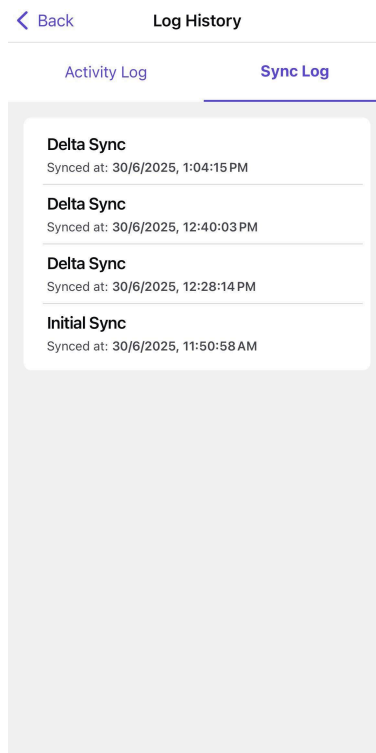
Figure 14-2 Activity Log



### Sync Log

This tab displays the latest sync events and updates as soon as they occur. Logs are updated in real time, with no need to manually refresh the screen.

Figure 14-3 Sync Log



The screenshot shows a mobile application interface for viewing a user's sync log. At the top, there is a navigation bar with a back arrow and the text 'Log History'. Below this, there are two tabs: 'Activity Log' and 'Sync Log', with 'Sync Log' being the active tab. The main content area displays a list of sync events, each with a title and a timestamp. The events are: 'Delta Sync' at 1:04:15 PM, 'Delta Sync' at 12:40:03 PM, 'Delta Sync' at 12:28:14 PM, and 'Initial Sync' at 11:50:58 AM.

Activity Log	Sync Log
	<b>Delta Sync</b> Synced at: 30/6/2025, 1:04:15 PM
	<b>Delta Sync</b> Synced at: 30/6/2025, 12:40:03 PM
	<b>Delta Sync</b> Synced at: 30/6/2025, 12:28:14 PM
	<b>Initial Sync</b> Synced at: 30/6/2025, 11:50:58 AM