mRounds Configuration Guide

Connected Worker Solutions

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Preface

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

Intended Audience

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

Document Conventions

Table 0-1 Conventions followed in the document

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

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Contents

1. What's New for mRounds Configurators

This section highlights the latest updates for Configurators in mRounds. Enhancements include streamlined metadata management, easier system integrations, improved administrative controls, and flexible round design options.

These features empower Configurators to set up, manage, and adapt inspection workflows more effectively, ensuring that Operators always have the right tools and information in the field.

New Features and Enhancements in Release 2504.02

Table 1-1 New Features and Enhancements in Release 2504.02

Custom Configuration for Consistent and Relevant Shift Transitions Supervisors can now configure Shift Handover Report formats based on specific plant requirements. With flexible field settings and formats, each site can tailor the shift handover process to local workflows—ensuring consistent and meaningful shift change documentation. For more information, see Create Plants *(on page 47)*.

New Features and Enhancements in Release 2501

Table 1-2 New Features and Enhancements in Release 2501

Smart Workflow Features • **Plant-Level Asset Scanning**: Control Asset Scan functionality at the plant level by enabling or disabling it during plant creation or modification. For more information, see Create Plants *(on page 47)*.
Administrative & Data Management Enhancements • **Enhanced SFTP Integration:** Added "Units" and "Positions" columns to the SFTP file for task management. For more information, see Establish a Connection with FTP Server for Data Export *(on page 15)*. • **Plant-Level Asset Scanning**: Granular control over asset scan functionality at the plant level, allowing customization per facility. For more information, see Create Plants *(on page 47)*. • **Bulk User Creation:** Tenant Admins can now upload CSV or Excel files to create multiple users at once, saving time. For more information, see Create Tenant/Super Admin role *(on page 39)*.

New Features and Enhancements in Release 2408

Table 1-3 New Features and Enhancements in Release 2408

SFTP Server Downtime Notifications Stay ahead of potential disruptions with SFTP Server Downtime Notifications. This feature sends instant alerts when the SFTP server experiences downtime, enabling the super admin to take immediate action and restore operations without delay. How it benefits: • **Proactive Issue Management**: Super admins are promptly informed of any server issues, allowing for quick resolution. • **Minimized Impact**: Faster responses help reduce the negative effects of server downtime on daily operations.

Table 1-3 New Features and Enhancements in Release 2408 (continued)

For more information, see Establish a Connection with FTP Server for Data Export *(on page 15)*.
Plant-Specific Filters in Master Data, Reports and Dashboard The Plant-Specific Filters feature allows operators to filter and view data, reports, and dashboards specific to individual plants within an organization. How it benefits: • **Enhanced Decision-Making**: Plant-specific filters enable managers and operators to make more informed decisions based on precise data from their specific operational unit, avoiding irrelevant information from other plants. • **Operational Focus**: Operators and staff can focus on their specific plant's performance, driving productivity improvements and targeted troubleshooting without distraction from other operational areas. For more information, see Create and Manage Master Data *(on page 47)*.

New Features and Enhancements in Release 2401

Table 1-4 New Features and Enhancements in Release 2401

Configure Priorities for Issues and Actions at Tenant Level Set Priority dropdowns with color codes for Issues and Actions at the Tenant Level. For more information, see Create Tenant/Super Admin role *(on page 39)*.
Configure to control notification creation for "Incident" and "Near Miss" categories Configure to control notification creation for "Incident" and "Near Miss" categories at the tenant level, with the option to individually enable or disable SAP Notifications for each category. For more information, see Create Tenant/Super Admin role *(on page 39)*.

New Features and Enhancements in Release 2312

Table 1-5 New Features and Enhancements in Release 2312

Download User List for a Plant Download the user list from the User Management module and view their assigned roles. For more information, see Onboard Users and Assign Roles *(on page 63)*.

New Features and Enhancements in Release 2311

Table 1-6 New Features and Enhancements in Release 2311

Mark Functional Locations as Units Mark or flag Functional Locations as units. This helps assign users to units, create user groups based on units, select a unit while creating a round plan, schedule rounds by unit, and filter handover reports. For more information, see Create Locations *(on page 51)*.
Add Position Master Data • Add positions and assign them to users. • Create user groups and schedule rounds based on positions. For more information, see Create Positions *(on page 63)*.

New Features and Enhancements in Release 2309 SP03

Table 1-7 New Features and Enhancements in Release 2309 SP03

Create Master Data with Unique ID and avoid duplication

Table 1-7 New Features and Enhancements in Release 2309 SP03 (continued)

• Create master data such as plants, assets, and locations with a unique id and avoid duplication. • Manually enter ids when copying to prevent duplicates in assets, locations, and plants. • Receive error messages for duplicate IDs and records while bulk uploading master data. For more information, see Create and Manage Master Data *(on page 47)*.

New Features and Enhancements in Release 2309 SP02

Table 1-8 New Features and Enhancements in Release 2309 SP02

Sort Global Response Set by Ascending to Descending Order Create a Global Response Set by sorting the Global Pick List in both ascending order ("A to Z") and descending order ("Z to A"). For more information, see Create Global Response Set *(on page 59)*.

New Features and Enhancements in Release 2309

Table 1-9 New Features and Enhancements in Release 2309

Introduced User Groups • Create a user group and add users to the group. • Modify the user list in the user group. • Remove a user from the user group. • Copy an existing user group to quickly create new user groups. • Delete a user group and assign rounds to another group. For more information, see Create User Groups and Add Users *(on page 71)*.
Assign users to multiple plants

Table 1-9 New Features and Enhancements in Release 2309 (continued)

Assign users to multiple plants. Users can access plant specific data and execute maintenance for assets in the plant. For more information, see Create Users and Assign Roles *(on page 67)*.

New Features and Enhancements in Release 2306

Table 1-10 New Features and Enhancements in Release 2306

Setup Timezone at Plant Level • Assign country codes to plant masters. • Enable time zone selection based on the plant's country. For more information, see Create Plants *(on page 47)*.

New Features and Enhancements in Release 2304

Table 1-11 New Features and Enhancements in Release 2304

Add, Search, View, and Edit Plants Data • Add, edit / modify plants' data. • Search plants and view details. For more information, see Create Plants *(on page 47)*.
Add, Search, View, and Edit Asset Data • Add, edit / modify assets data. • Search assets and view details. • Bulk upload assets data through excel files. For more information, see Create Plants *(on page 47)*.
Add, Search, View, and Edit Location Data

Table 1-11 New Features and Enhancements in Release 2304 (continued)

• Add, edit / modify locations' data for assets. • Search locations and view details. • Bulk upload locations data through excel files. For more information, see Create Locations *(on page 51)*.
Add, Search, View, and Edit Unit of Measurement (UOM) Data • Add, edit / modify units of measurement. • Search the list of UOMs and view details. • Bulk upload UOM through excel files. For more information, see Create Unit of Measurement *(on page 56)*.
Add, Search, View, and Edit Global Response Set Data • Add, edit / modify Global Response Set data. • Search Global Response Set data and view details. • Bulk upload Global Response Set data through excel files. For more information, see Create Global Response Set *(on page 59)*.
Onboard New Customers • Onboard customers as a tenant/super admin. • View and edit the tenant details such as primary, ERP, protected resources, database configuration, collaboration, configuration, and assets. • Provide access to modules in the CBO application. • Add a customer logo in the application for tenant users to identify the instance of the connected worker platform. For information, Onboard Tenants/Super Admins *(on page 39)*.
Onboard Users

Table 1-11 New Features and Enhancements in Release 2304 (continued)

- Create roles and assign permissions to the modules in the application.
- Create users and assign roles. Provide access to the right modules to execute their tasks.
- View and edit user details and deactivate users who are no longer required.

For information, Create Users and Assign Roles *(on page 67)*.

2. Integrate mRounds with External Systems

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

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

This chapter has the following topics:

2.1. Establish a Connection with FTP Server for Data Export

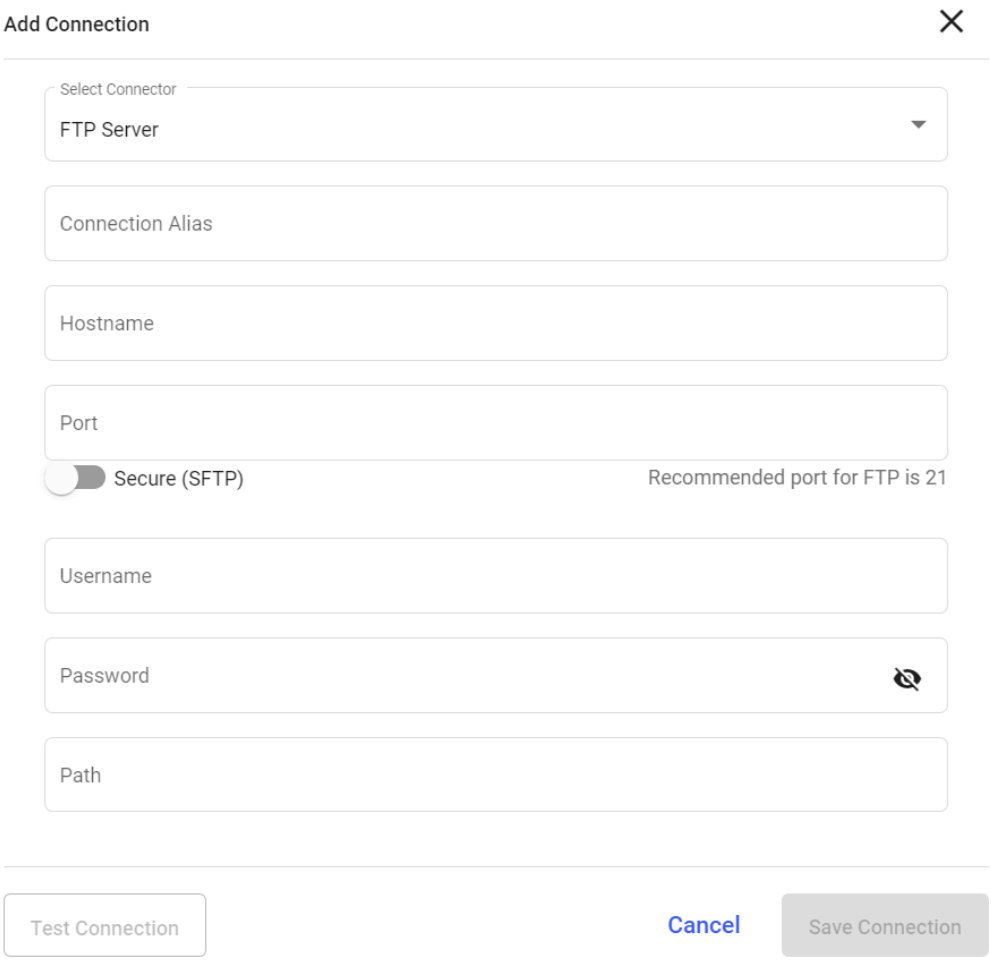
An FTP (File Transfer Protocol) server connection allows mRounds to securely transfer large volumes of data to external systems for reporting, backup, or further processing. Establishing this connection enables the export of rounds data and reports to FTP servers without manual intervention, ensuring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

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

To create a connection for FTP server:

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

Figure 2-1 Create FTP Connection



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

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

In this section, you can,

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

Configure Data Export to FTP for Automated Transfer

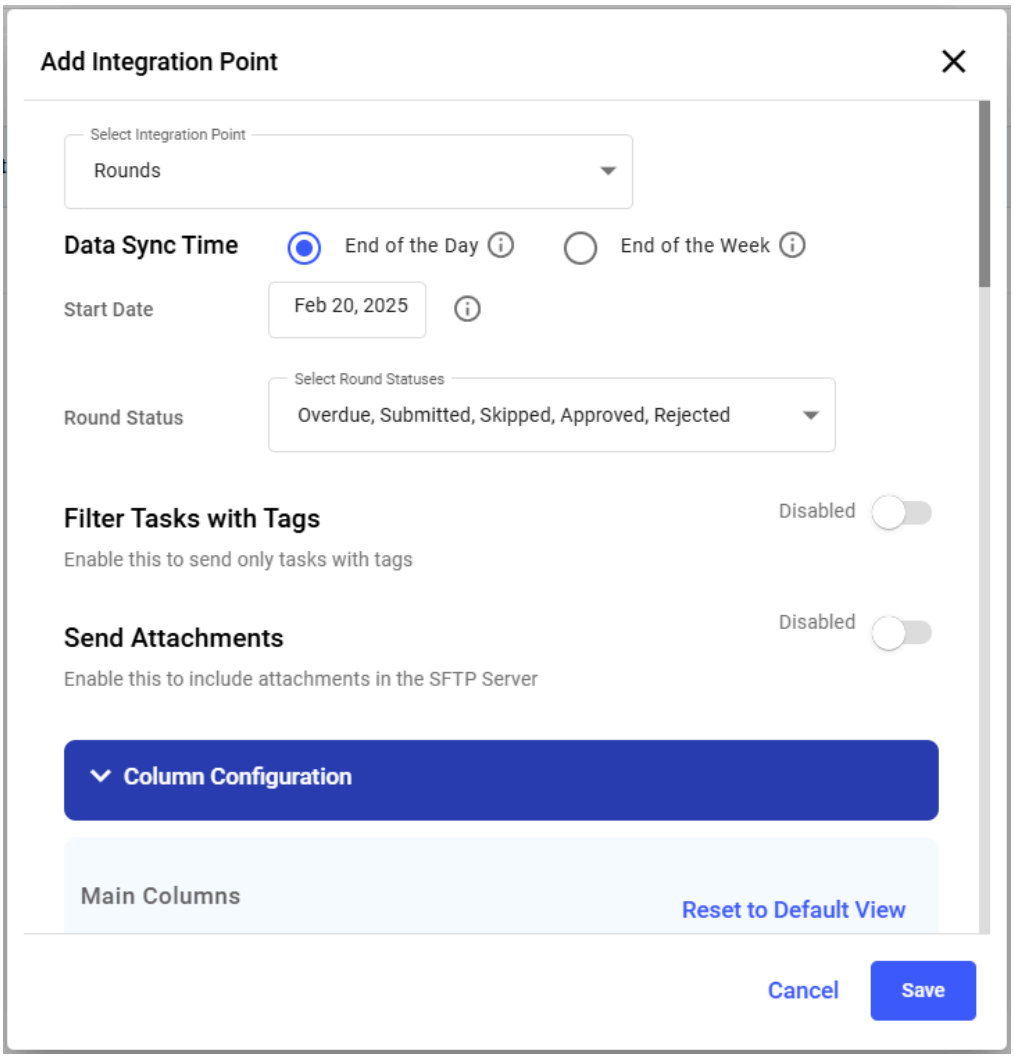
Once a secure connection is established, the next step is to configure mRounds to export data to the FTP server. This setup allows specific types of data such as rounds results, reports, and issues to be automatically exported to the FTP server.

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

To add an integration to FTP server

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

Figure 2-2 Add Integration Point



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

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

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

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

2.2. Establish a Connection with ODBC for Database Integration

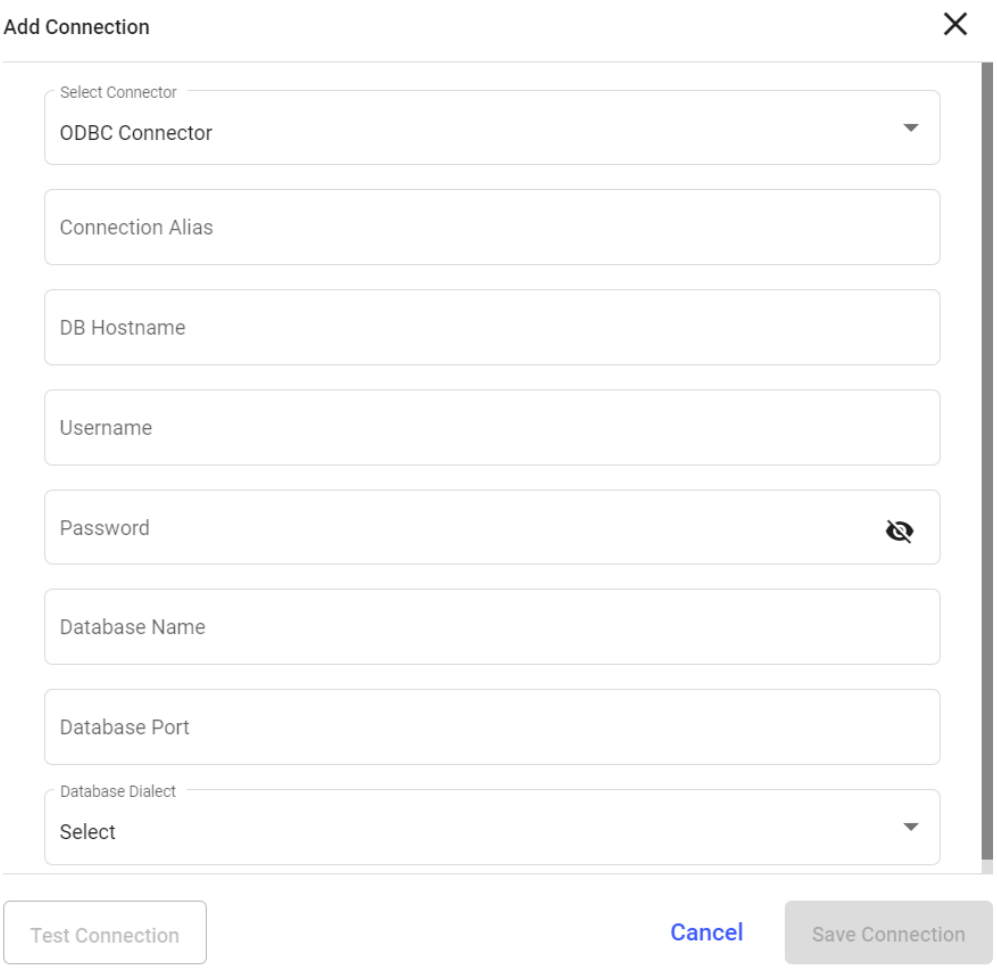
The ODBC (Open Database Connectivity) connector allows mRounds to directly interface with external databases. This connection is crucial for exporting rounds data to an organization's internal databases, enabling further analysis and integration with other systems like reporting tools or custom dashboards.

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

To create a connection for ODBC connector:

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

Figure 2-3 Add ODBC Connection



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

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

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

In this section, you can,

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

Configure Data Export to ODBC for Database Storage

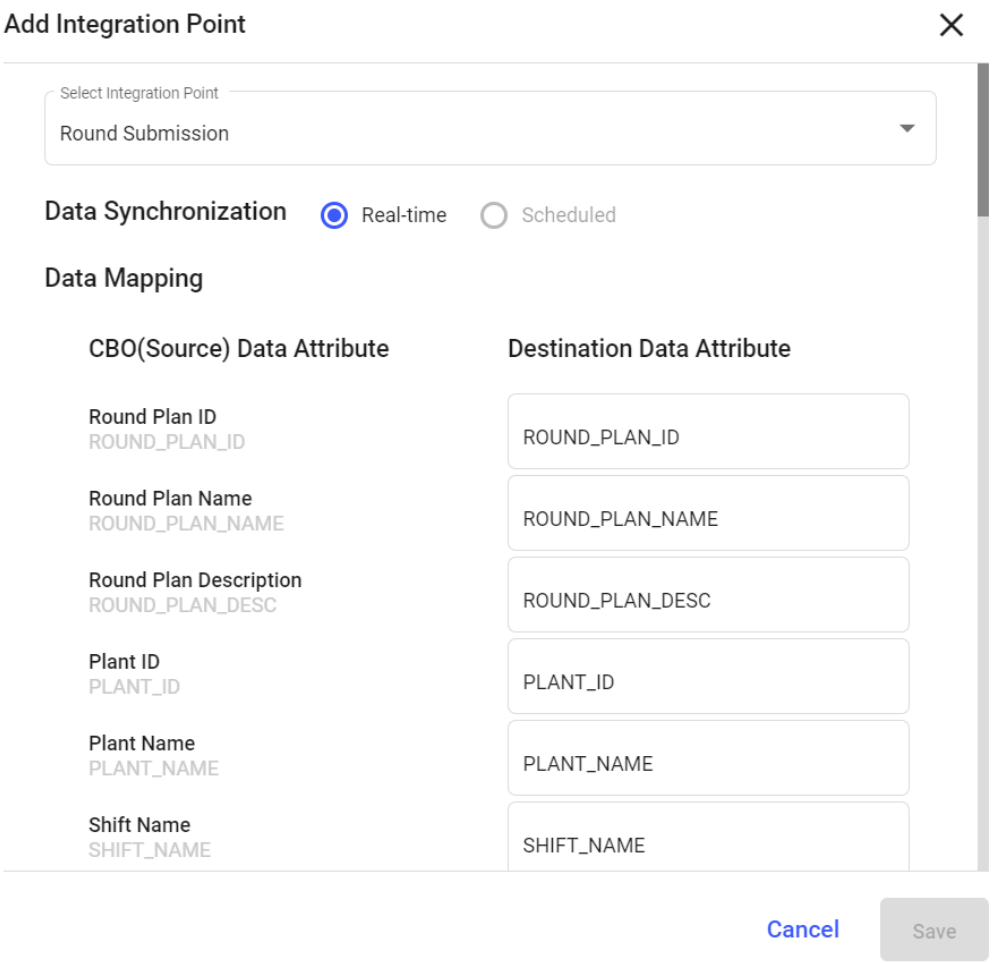
Once the ODBC connection is established, you can configure mRounds to export data directly into your organization's external database. This allows for real-time synchronization between mRounds and your database for further analysis or reporting.

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

To add an integration to ODBC connection:

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

Figure 2-4 Add Integration Point



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

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

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

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

2.3. Configure an SMTP Server for Automated Email Notifications

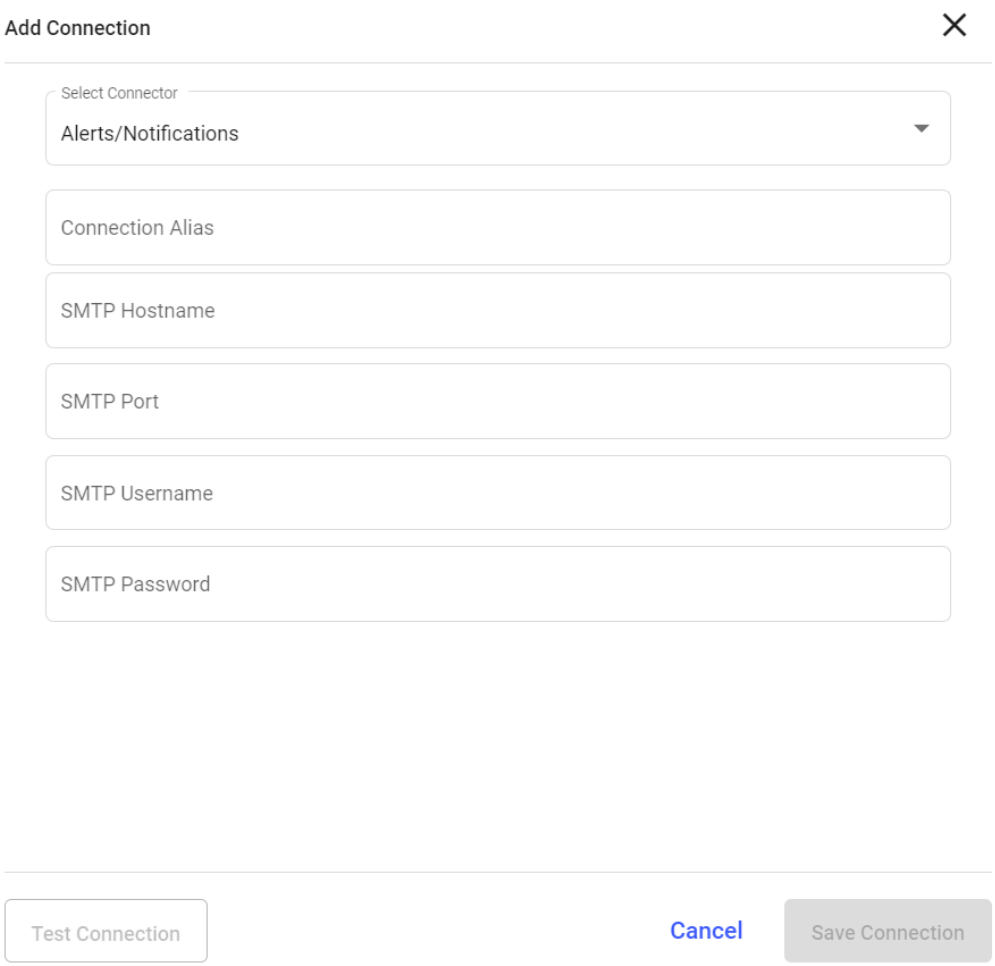
Configuring an SMTP (Simple Mail Transfer Protocol) server allows mRounds to send automated email notifications to stakeholders about task completions, issues, and important updates. This connection ensures timely communication about maintenance operations.

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

To create a connection for SMTP server:

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

Figure 2-5 Add SMTP Connection



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

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

In this section, you can,

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

Configure Email Notifications with SMTP

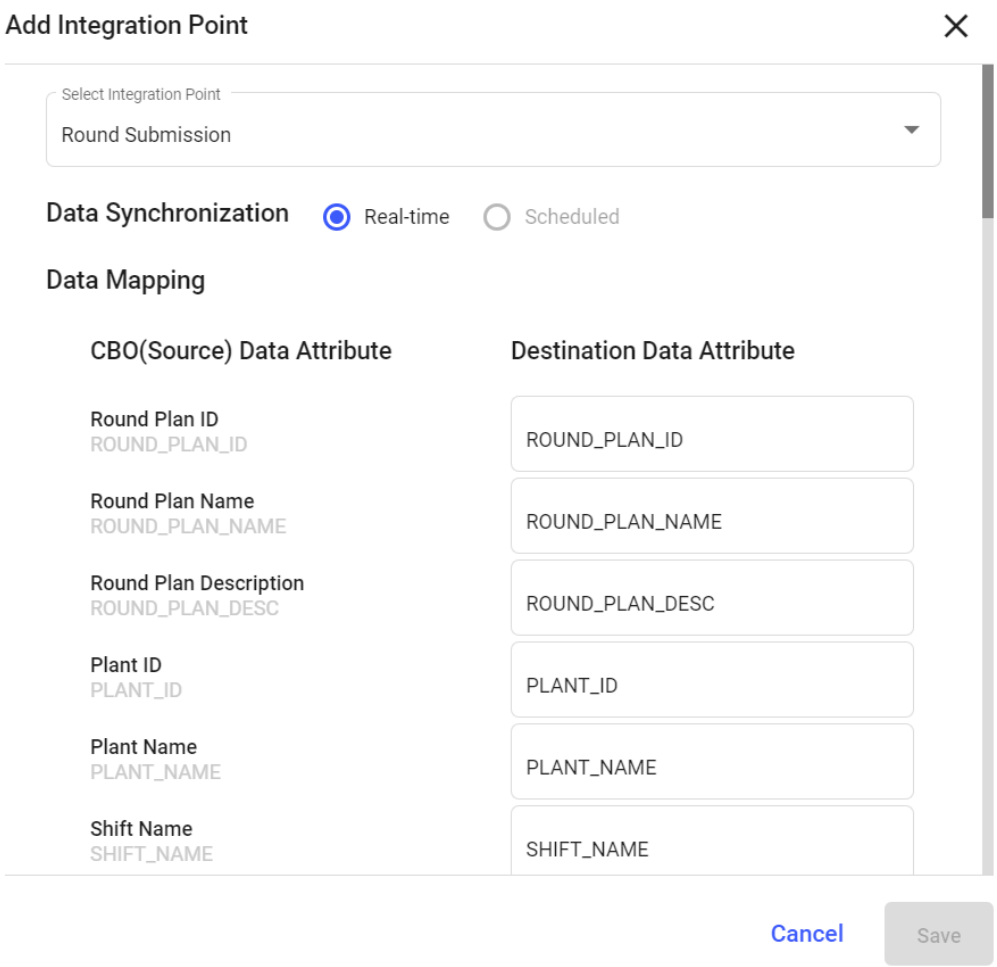
Once the SMTP connection is configured, you can set up automated email notifications to be triggered based on specific events in mRounds, such as issue creation, task completion, or round updates. This ensures timely communication with stakeholders.

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

To add an integration to SMTP server:

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

Figure 2-6 Add Integration Point



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

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

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

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

2.4. Integrate mRounds with SAP

The SAP integration enables bidirectional data flow between SAP and mRounds. You synchronize location and asset master data from SAP into mRounds, ensuring that your maintenance rounds reflect the current state of your plant infrastructure.

When technicians identify issues or anomalies during rounds, mRounds automatically creates SAP Notifications in your ERP system, triggering your established maintenance workflows.

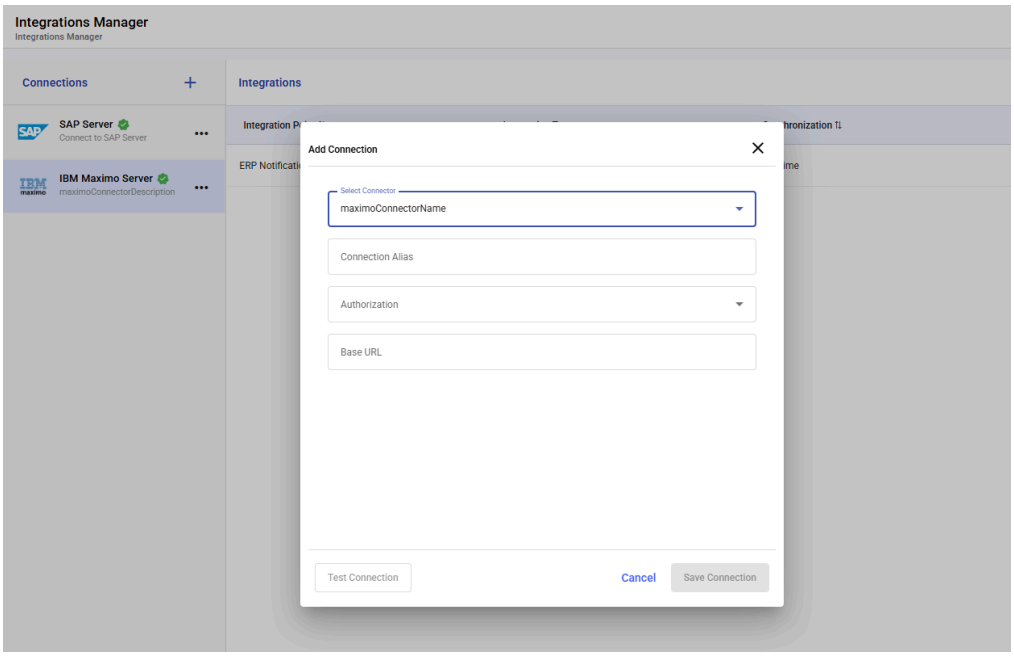
Configuration is managed through the Integrations Manager interface where you establish a secure server connection and configure individual integration points with endpoint paths and field mapping for master data synchronization and ERP notification creation.

Create a SAP Server Connection

The SAP Server connection establishes secure communication between mRounds and your SAP system. This connection uses your chosen authorization method to authenticate requests and serves as the foundation for all subsequent data exchanges between the two systems.

1. Open **Integrations Manager**.

Figure 2-7 Connection screen



2. In **Connections**, click **+**.
3. In **Add Connection**, do the following:
    a. **Select Connector:** SAP Server
    b. **Connection Alias:** enter a name (example: SAP - Prod)
    c. **Authorization:** select **Basic**, **Certificate**, or **API Key**, then complete the required fields.
4. Click **Test Connection**.
5. Click **Save Connection**.

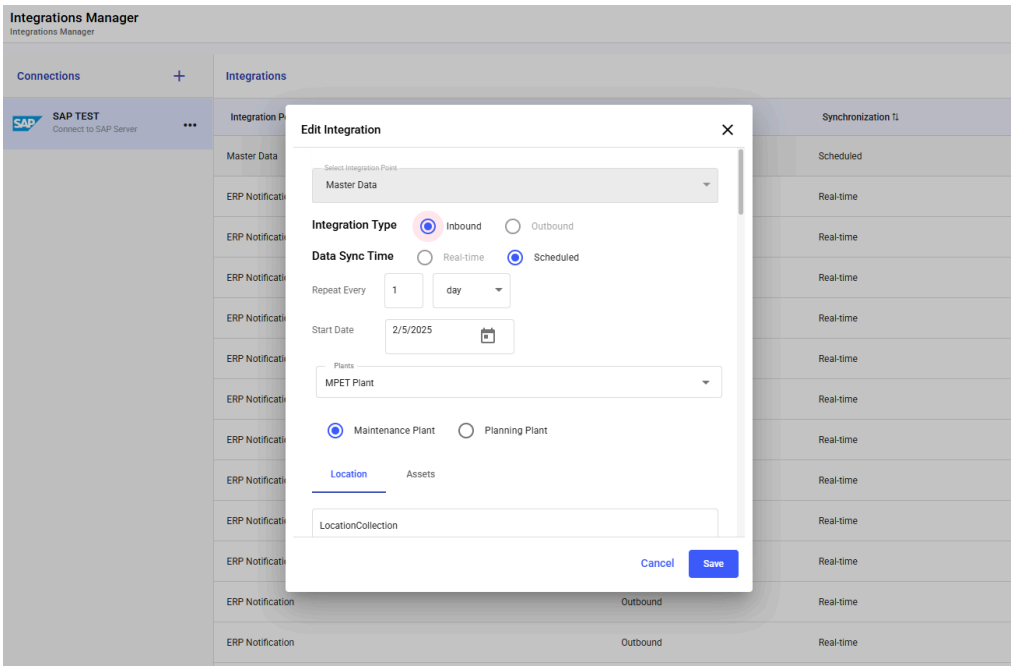
Configure Inbound Integration for Master Data (Locations and Assets)

The inbound master data integration pulls location and asset information from SAP into mRounds. This synchronization ensures that technicians see current, accurate facility data when they perform maintenance rounds. Schedule these updates to run automatically at regular intervals, keeping your mRounds data aligned with your SAP master records.

To add an inbound master data integration:

1. In **Integrations Manager**, select your SAP connection.
2. Click **Add Integration** (or select **Master Data** and click **Edit**).

Figure 2-8 Connection screen



3. In the **Add/Edit Integration** window, do the following:
    a. **Select Integration Point:** Master Data
    b. **Integration Type:** Inbound
    c. **Data Sync Time:**
        - **Scheduled** (recommended): set **Repeat Every** and **Start Date**
        - **Real-time** (optional): use only if validated
    d. **Plants:** select the relevant plant.
    e. Select **Maintenance Plant** or **Planning Plant** (as applicable).
    f. Configure endpoints:
        - **Location** tab: enter the SAP location collection/path.
        - **Assets** tab: enter the SAP asset collection/path.
    g. Configure **Column Configuration/Data Mapping** to map SAP fields to mRounds fields.
    h. Click **Save**.

Result: Locations and Assets are synchronized into mRounds according to your schedule.

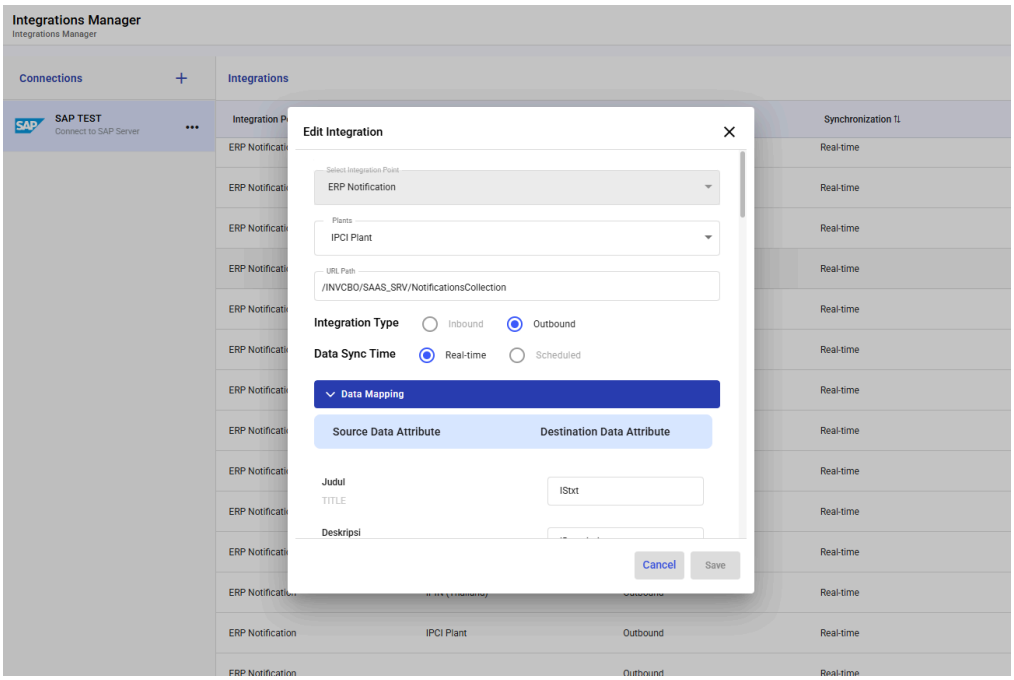
Configure Outbound Integration for ERP Notification (Create SAP Notifications)

The outbound ERP notification integration sends issue and anomaly data from mRounds to SAP, automatically creating SAP Notifications when technicians report problems during their rounds. This real-time integration ensures that maintenance issues trigger your established work order processes in SAP without manual data entry, reducing response times and improving operational efficiency.

To add an outbound ERP notification integration:

1. In **Integrations Manager**, select your SAP connection.
2. Click **Add Integration** (or select an existing **ERP Notification** and click **Edit**).

Figure 2-9 Connection screen



3. In the **Add/Edit Integration** window, do the following:

a. **Select Integration Point:** ERP Notification
b. **Plants:** select the relevant plant.
c. **URL Path:** enter the SAP notifications endpoint path (example: /INVCBO/SAAS_SRV/NotificationsCollection).
d. **Integration Type:** Outbound
e. **Data Sync Time:** select **Real-time** (recommended) or **Scheduled** (if batching is required).
f. Expand **Data Mapping** and map **Source Data Attribute** → **Destination Data Attribute** (mRounds → SAP Notification fields).
g. Click **Save**.

Result: When an issue/ERP notification is created in mRounds (per your configured workflow), an SAP Notification is created in SAP with the mapped values.

2.5. Integrate mRounds with IBM Maximo

The IBM Maximo integration enables bidirectional data flow between Maximo and mRounds. You synchronize location and asset master data from Maximo into mRounds, ensuring that your maintenance rounds reflect the current state of your plant infrastructure.

When technicians identify issues or anomalies during rounds, mRounds automatically sends notification data to Maximo, creating maintenance records through your configured endpoint and triggering your established maintenance workflows.

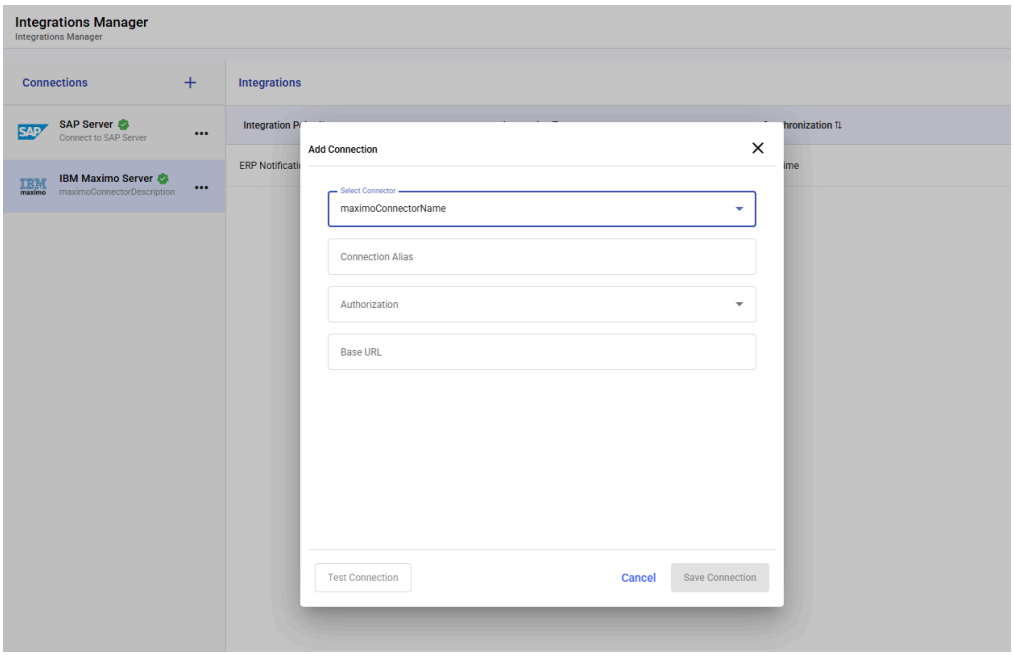
Configuration is managed through the Integrations Manager interface where you establish a secure server connection and configure individual integration points with endpoint paths and field mapping for master data synchronization and notification creation.

Create an IBM Maximo Server Connection

The IBM Maximo Server connection establishes secure communication between mRounds and your Maximo system. This connection uses your chosen authorization method to authenticate requests and serves as the foundation for all subsequent data exchanges between the two systems.

1. Open **Integrations Manager**.

Figure 2-10 Connection screen



2. In **Connections**, click **+**.
3. In **Add Connection**, do the following:
    a. **Select Connector:** IBM Maximo Server
    b. **Connection Alias:** enter a name (example: Maximo - Prod)
    c. **Authorization:** select the supported method and complete required fields.
4. Click **Test Connection**.
5. Click **Save Connection**.

Configure Inbound Integration for Master Data (Locations and Assets)

The inbound master data integration pulls location and asset information from Maximo into mRounds. This synchronization ensures that technicians see current, accurate facility data when they perform maintenance rounds. Schedule these updates to run automatically at regular intervals, keeping your mRounds data aligned with your Maximo master records.

To add an inbound master data integration:

1. In **Integrations Manager**, select your Maximo connection.
2. Click **Add Integration** (or select **Master Data** and click **Edit**).
3. In the **Add/Edit Integration** window, do the following:
    a. **Select Integration Point:** Master Data
    b. **Integration Type:** Inbound
    c. **Data Sync Time:**
        - **Scheduled** (recommended): set **Repeat Every** and **Start Date**
        - **Real-time** (optional): use only if validated
    d. **Plants:** select the relevant plant.
    e. **URL Path:** enter the Maximo endpoint/object structure path used to pull master data (provided by your Maximo admin).
    f. Configure **Data Mapping** to map Maximo fields to mRounds fields.
    g. Click **Save**.

Note: If your Maximo setup uses different endpoints for **Locations** and **Assets**, create separate inbound integrations (one per endpoint) and map fields accordingly.

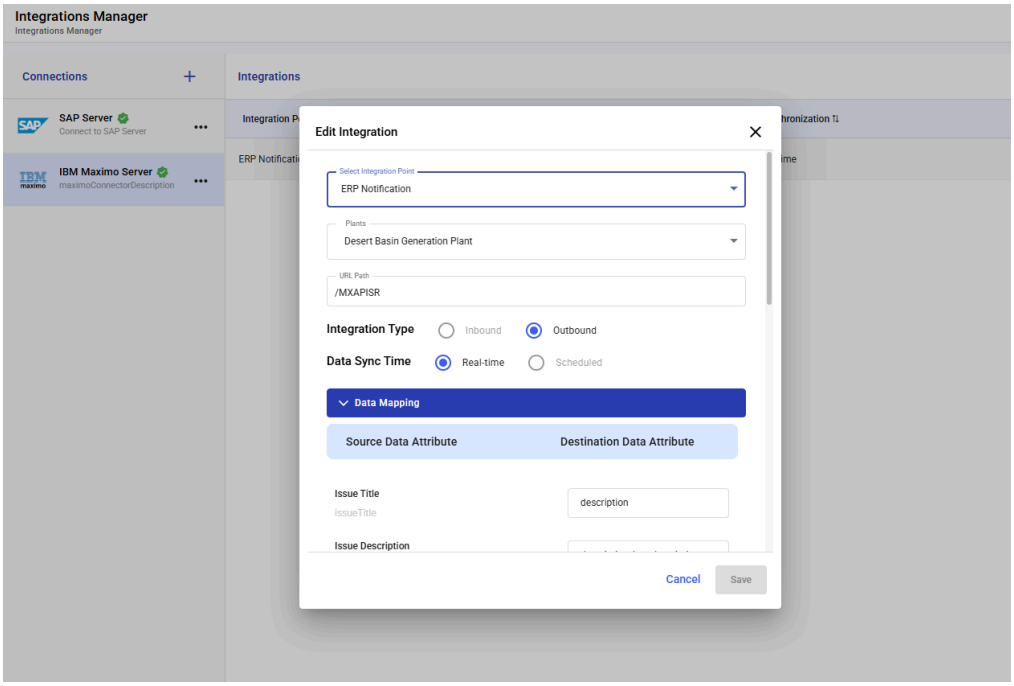
Configure Outbound Integration for ERP Notification (Send to Maximo)

The outbound ERP notification integration sends issue and anomaly data from mRounds to Maximo, automatically creating maintenance records when technicians report problems during their rounds. This integration uses your configured endpoint and object structure to create records in Maximo, ensuring that maintenance issues trigger your established work order processes without manual data entry, reducing response times and improving operational efficiency.

To add an outbound ERP notification integration:

1. In **Integrations Manager**, select your Maximo connection.
2. Click **Add Integration** (or select an existing **ERP Notification** and click **Edit**).

Figure 2-11 Connection screen



3. In the **Add/Edit Integration** window, do the following:
   a. **Select Integration Point:** ERP Notification
   b. **Plants:** select the relevant plant.
   c. **URL Path:** enter the Maximo endpoint/object structure path (example: /MXAPISR).
   d. **Integration Type:** Outbound
   e. **Data Sync Time:** select **Real-time** (recommended) or **Scheduled** (if batching is required).
   f. Expand **Data Mapping** and map **Source Data Attribute** → **Destination Data Attribute**.
      - Example commonly used: **Issue Title** → **description**
   g. Click **Save**.

Result: When an issue/ERP notification is created in mRounds (per your configured workflow), a corresponding record is created in Maximo using the configured endpoint and mappings.

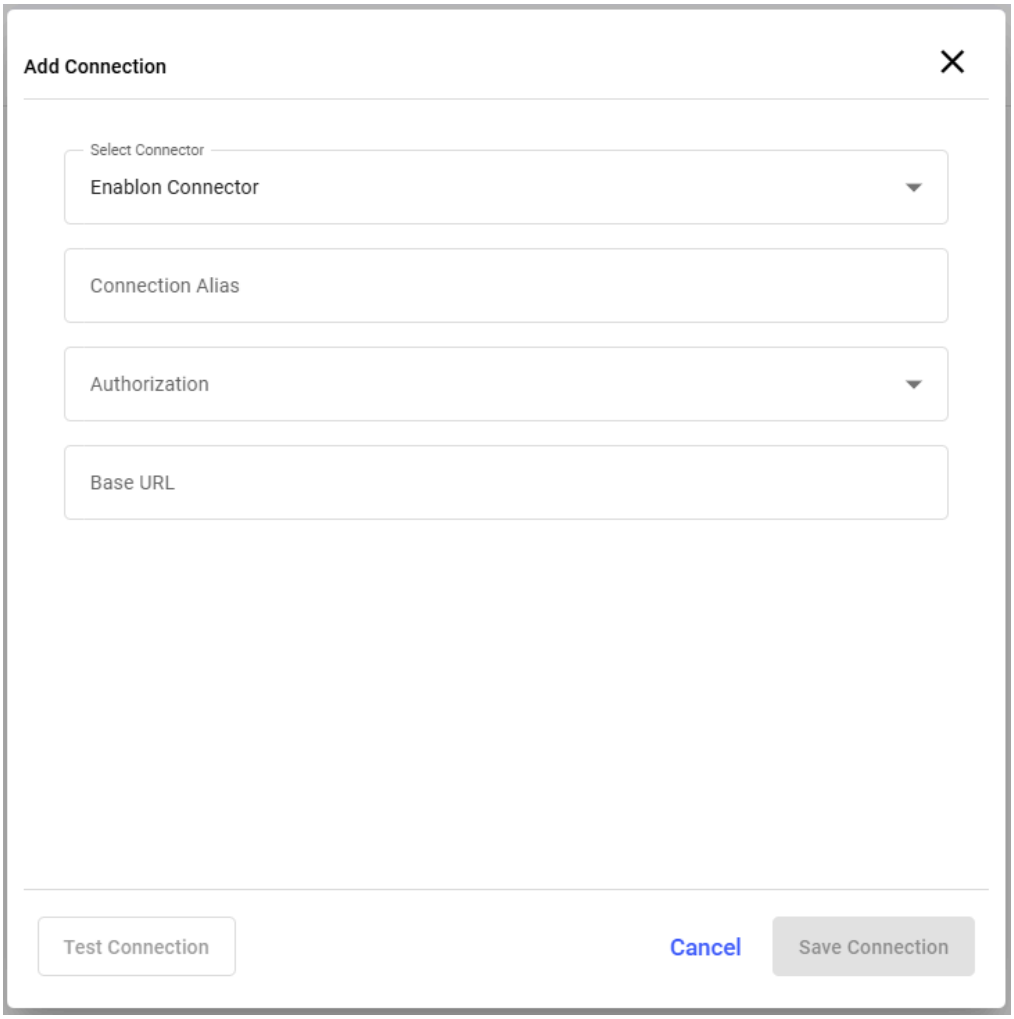
2.6. Establish a Connection with Enablon for EHS Incident Management

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

To create a connection for Enablon connector:

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

Figure 2-12 Add Enablon Connection



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

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

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

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

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

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

In this section, you can,

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

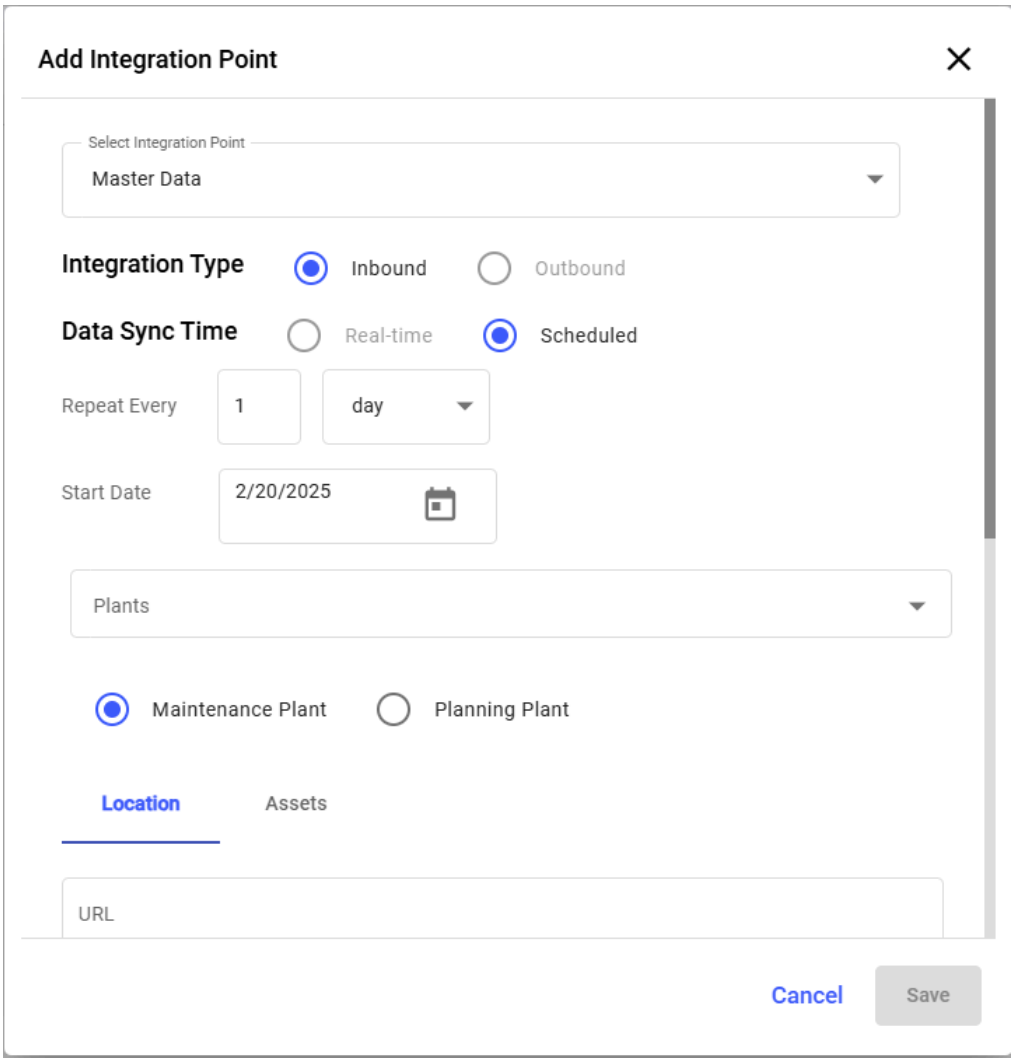
Configure EHS Notifications with Enablon

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

To add an integration to Enablon:

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

Figure 2-13 Add Integration Point



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

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

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

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

3. Onboard Tenants/Super Admins

Use the **Tenant Management** module to create tenant or super admin roles for onboarded customers/user and provide access to the applications and modules.

As a CWP Admin, create a Tenant/Super Admin role for the user by collecting the details such as primary, ERP, resources, database configuration, collaboration, and configurations and assign all the required permissions to products and modules.

Note:
There should be only one Super Admin and the admin should have all the permissions to create, edit, delete, and so on.

In this module, you can,

- Select the relevant product such as mInventory and mWorkOrder using the **Product** drop-down.
- Search the admin roles using the **Search** bar.
- Create super admin roles using the **Add Tenant** button.
- Edit super admin roles using the More ••• icon > **Edit** option.
  You can edit the admin details. Select the admin in the Tenant Management screen and then click the **Edit** button on the right side or clicking the More ••• icon > **Edit** option in the Tenant Management screen.

  Note:
  Some fields are disabled to edit once the Tenant/Customer is onboarded.

- Sort the values such as Tenant and Created On using the Sort ⇅ icon next to the respective columns.

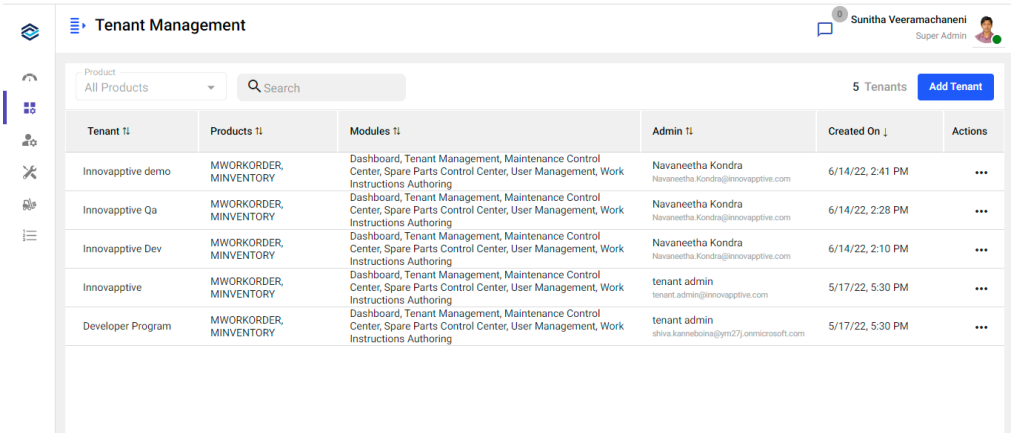
3.1. Create Tenant/Super Admin role

You can create a tenant/super admin role and provide access to relevant applications such as mWorkOrder and mInventory and the modules available in the CBO application.

To create a tenant/super admin role:

1. Click the **Tenant Management** module on the left side pane.

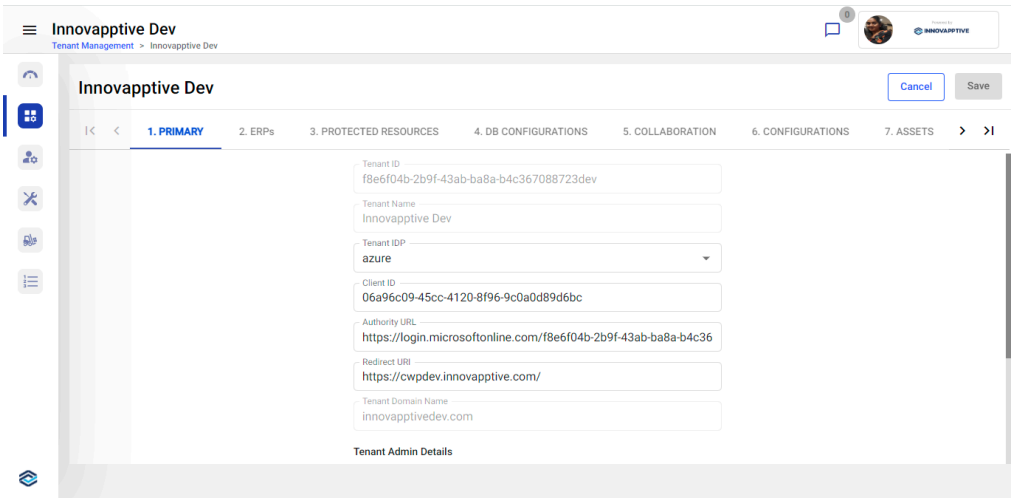
Figure 3-1 Tenant Management Module



2. Click the **Add Tenant** button on the right-side.
3. In the **Primary** tab, enter the following details:
    a. **Tenant ID** – enter the customer id.
    b. **Tenant Name** – enter the customer's name.
    c. **Tenant IDP** – select the value from the drop down.
    d. **Client ID** – enter the client id.
    e. **Authority URL** – enter the URL to which you want to provide access (for example, CWP application).
    f. **Redirect URI** – enter the URL to redirect.
    g. **Tenant Domain Name** – enter the customer domain name.
    h. In the **Tenant Admin Details** section, enter **First Name**, **Last Name**, **Title**, and **Email**.

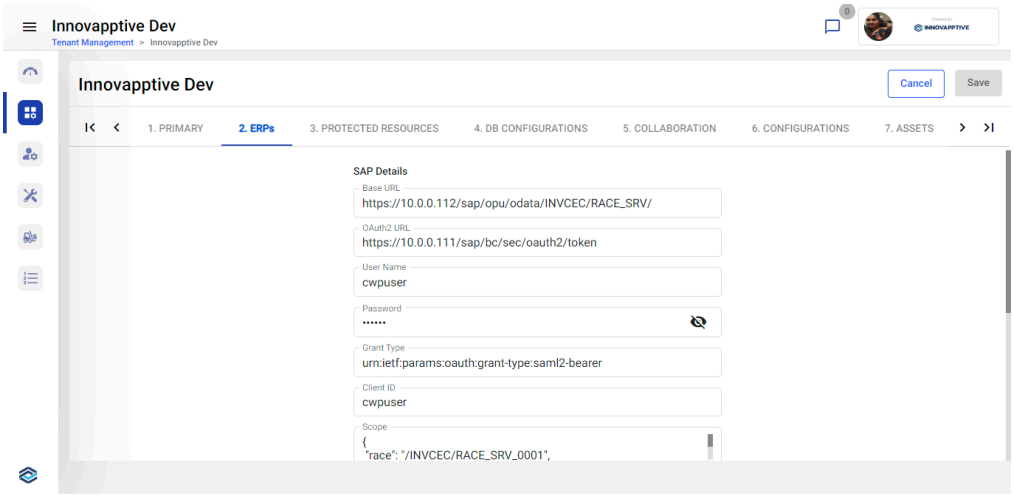
> **Note:**
> The email is valid based on the selected **Tenant IDP**.

Figure 3-2 Add Tenant Primary Details



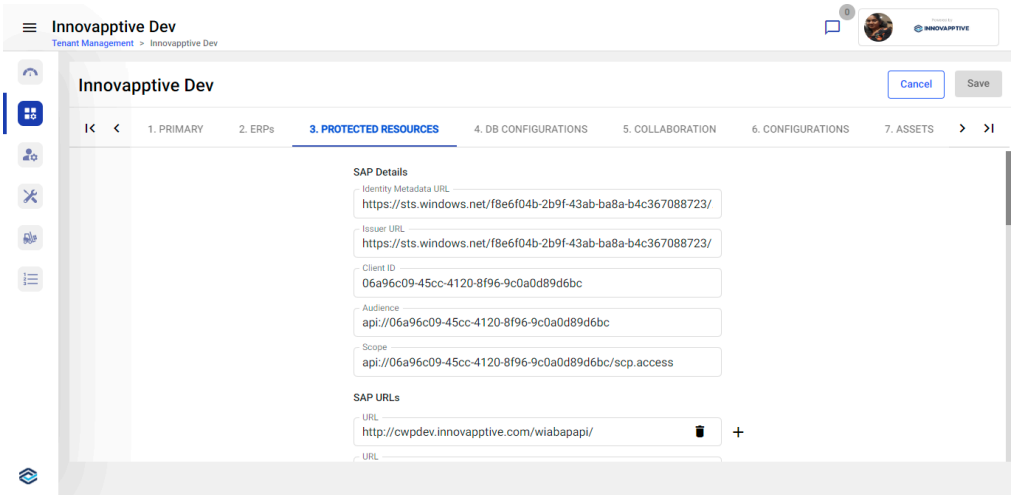
4. In the **ERPs** tab, do the following:
    a. In the **SAP Details** section, enter the following:
        i. **Base URL** – enter the relevant URL.
        ii. **OAuth2 URL** – enter the relevant URL.
        iii. **User Name** – enter the customer username.
        iv. **Password** – enter the customer password.
        v. **Grant Type** – enter the type.
        vi. **Client ID** – enter the client id.
        vii. **Scope** – enter the scope id.
    b. In the **SAP SAML Details** section, enter the following:
        i. **OAuth2 URL** – enter the relevant URL.
        ii. **Grant Type** – enter the type.
        iii. **Client Secret** – enter the client secret code.
        iv. **Resource** – enter the resource link.
        v. **Token Use** – enter the token id.
        vi. **Token Type** – enter the type of the token.

Figure 3-3 Add Tenant ERP Details



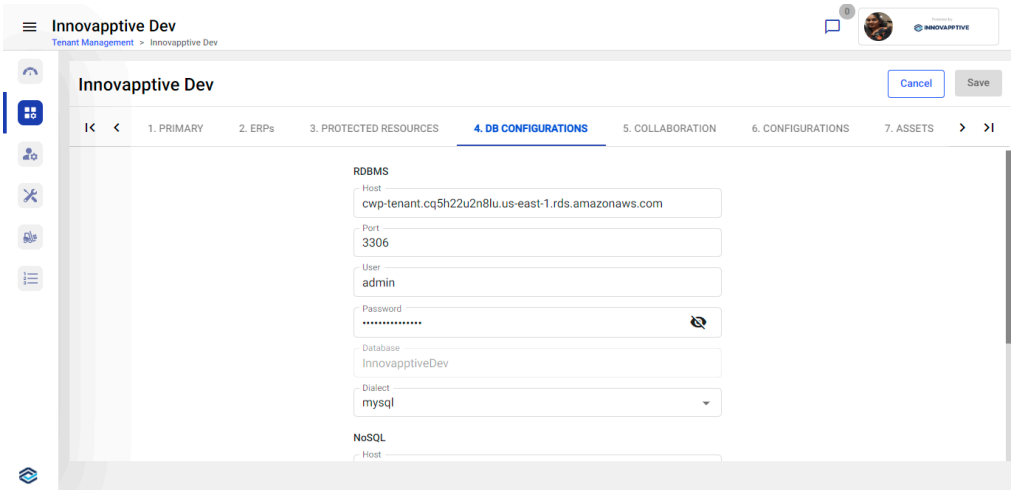
5. In the **Protected Resources** tab, do the following:
    a. In the **SAP Details** section, enter the following:
        i. **Identity Metadata URL** – enter the metadata URL.
        ii. **Issuer URL** – enter the issuer URL.
        iii. **Client ID** – enter the client id.
        iv. **Audience** – enter the audience id.
        v. **Scope** – enter the scope id.
    b. In the **SAP URLs** section, enter the relevant URLs.
    Click the **Add** icon to add extra fields.
    c. In the **Node Details** section, enter the following:
        i. **Identity Metadata URL** – enter the metadata URL.
        ii. **Issuer URL** – enter the issuer URL.
        iii. **Client ID** – enter the client id.
        iv. **Audience** – enter the audience id.
        v. **Scope** – enter the scope id.
    d. In the **Node URLs** section, enter the relevant URLs.
    Click the **Add** icon to add extra fields.

Figure 3-4 Add Tenant Resources Details

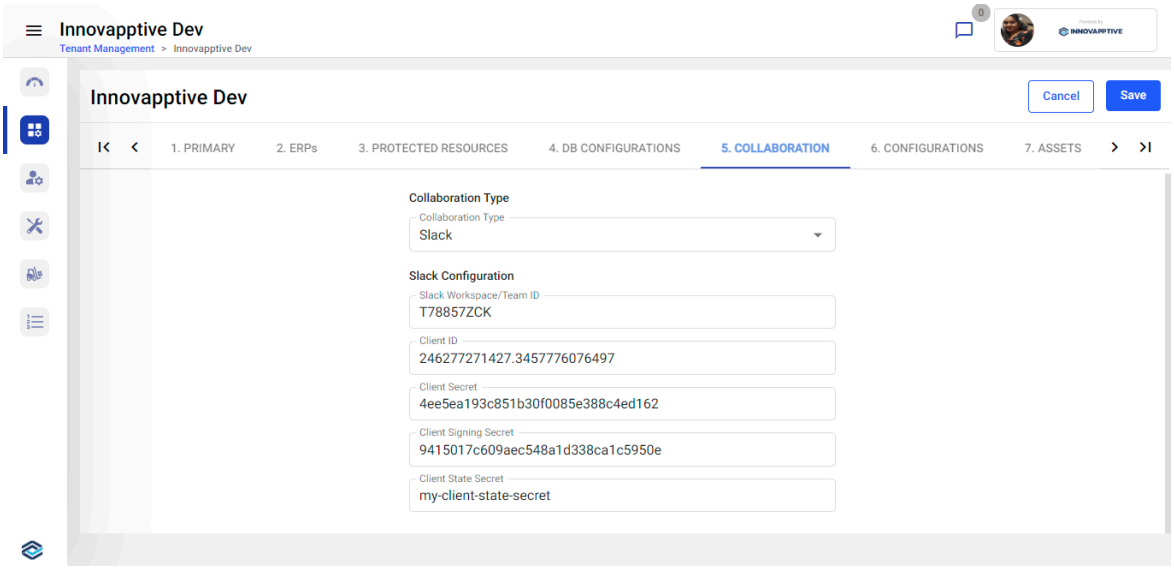


6. In the **DB Configurations** tab, enter the following:
    a. In the **RDBMS** section, enter the following:
        i. **Host** – enter the database host.
        ii. **Port** – enter the port number.
        iii. **User** – enter the username.
        iv. **Password** – enter the password.
        v. **Database** – fills automatically.
        vi. **Dialect** – select the value from the drop down.
    b. In the **NoSQL** section, enter the following:
        i. **Host** – enter the database host.
        ii. **Port** – enter the port number.
        iii. **User** – enter the username.
        iv. **Password** – enter the password.
        v. **Database** – fills automatically.

Figure 3-5 Add Tenant Database Details

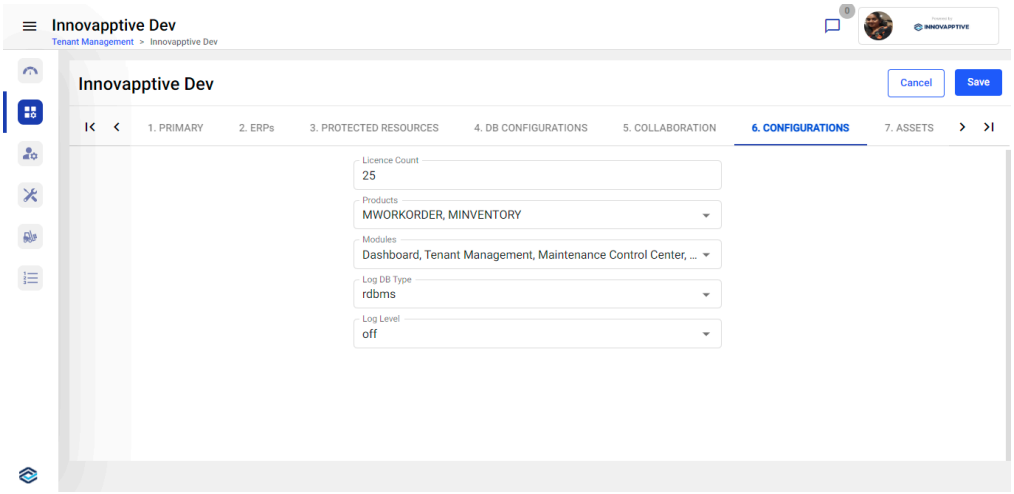


7. In the **Collaboration** tab, enter the following:
    a. **Collaboration Type** – select a collaboration type Slack or MS Teams to connect to the external chat application.
    b. If the **Collaboration Type** is **Slack**, enter the following:
        i. **Slack Workspace/Team ID**: enter slack workspace or team id.
        ii. **Client ID**: enter client id.
        iii. **Client Secret**: enter client secret code.
        iv. **Client Signing Secret**: enter client signing secret code.
        v. **Client State Secret**: enter client state secret code.
    c. If the **Collaboration Type** is **MS Teams**, enter the following:
        i. **Tenant ID**: enter onboard tenant id.
        ii. **Client ID**: enter client id.
        iii. **Client Secret**: enter client secret code.
        iv. **Share Point Site ID**: enter share point site id.
        v. **Private Key**: enter RSA private key.
        vi. **Public Key**: enter RSA public key.



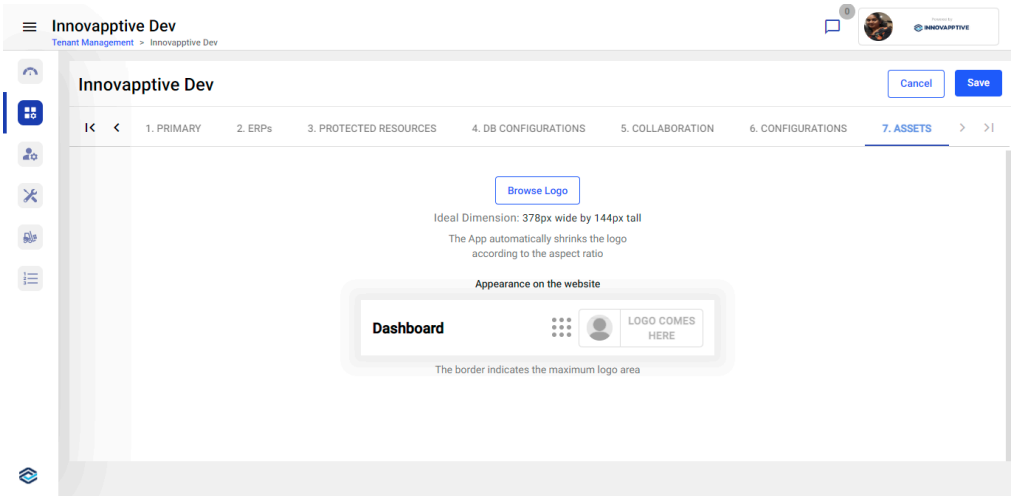
8. In the **Configurations** tab, enter the following:
    a. **License Count** – enter the count of the licenses that are provided to the tenant.
    b. **Products** – select the products that are assigned to the tenant from the drop down.
    c. **Modules** – select the modules that are assigned to the tenant from the drop down.
    d. **Log DB Type** – select the relevant database type from the drop down.
    e. **Log Level** – select the level from the drop down.

Figure 3-6 Add Tenant Configuration Details



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

Figure 3-7 Add Logo



10. Click the **Save** button.
    The tenant/super admin is created successfully, and you can access and edit it from the **Tenant Management** screen.

4. Create and Manage Master Data

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

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

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

This chapter has the following topics:

4.1. Create Plants

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

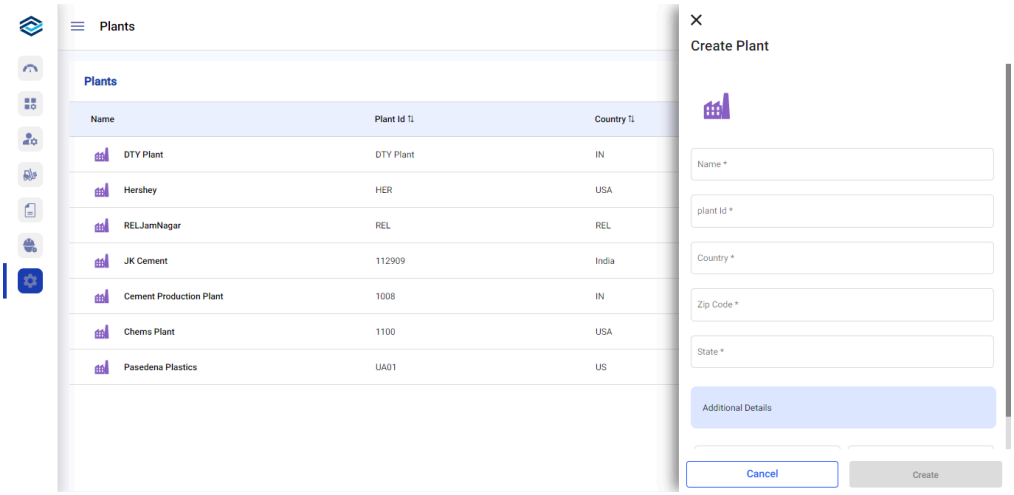
To create or add a plant:

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

Figure 4-1 Plants Screen

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

Figure 4-2 Add Plant Details



3. In the **Create Plant** window, enter plant details like **Name**, **Plant Id**, **Country**, **Zip Code**, **State**, **Time Zone**, **Shifts**, **Report Type**, and **Additional Details**.

> **Note:**
> If the Plant ID already exists, an error message “Plant ID <> already exists” is displayed. Use another ID.

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

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

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

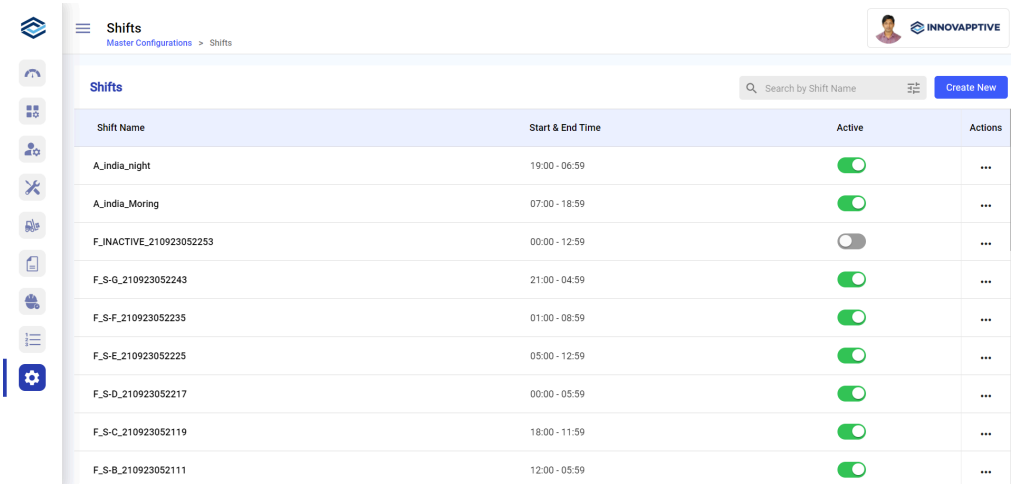
4.2. Create Shifts

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

To create or add a shift:

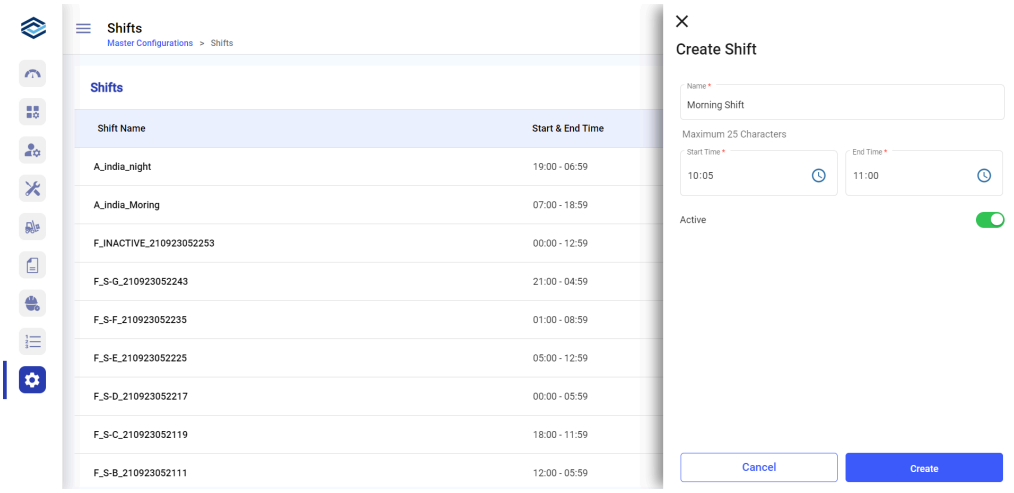
1. Click the **Master Configuration** module on the left side pane and click **Shifts**.

Figure 4-3 Shifts Screen



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

Figure 4-4 Add Shift Details



3. In the **Create Shift** window, enter shift details like **Name**, **Start Time**, **End Time**, and toggle **Active** to make the shift active.

4. Click **Create**.
   The new shift is created successfully.

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

4.3. Create Locations

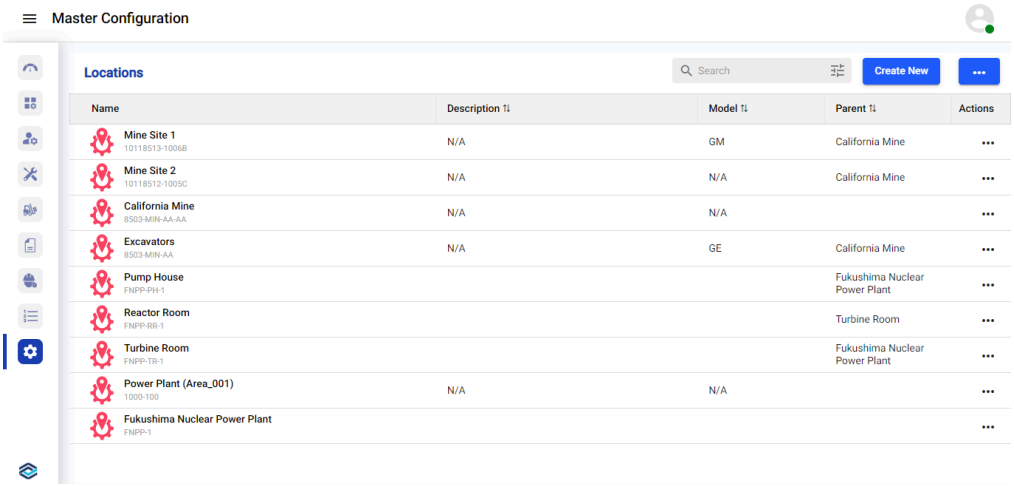
Locations represent specific areas within a plant where assets and maintenance activities are managed. For example, a plant may have locations such as Production Floor, Warehouse, or Cooling Unit Area. Defining locations allows for better tracking of assets, and maintenance tasks in a structured manner.

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

To create or add a location:

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

Figure 4-5 Locations Screen



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

Or

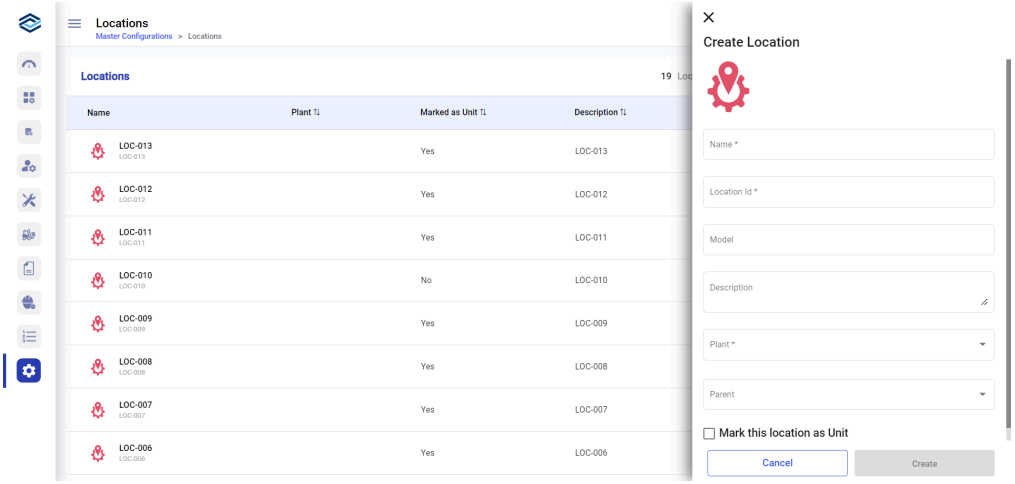
Click **Sync from SAP** to manually sync and export already created data from SAP server.

Or

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

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

Figure 4-6 Add Location Details



3. In the **Create Location** window, enter location details like **Name**, **Location Id**, **Model**, **Description**, **Plant**, and **Parent**.

> **Note:**
> If the Location ID already exists, an error message “Location ID <> already exists” is displayed. Use another ID.

4. Select the **Mark this location as Unit** to assign users, round plans, and shift handovers at unit level.
5. Click **Create**.

The new location is created successfully.

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

4.4. Create Assets

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

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

To create or add an asset:

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

   Or

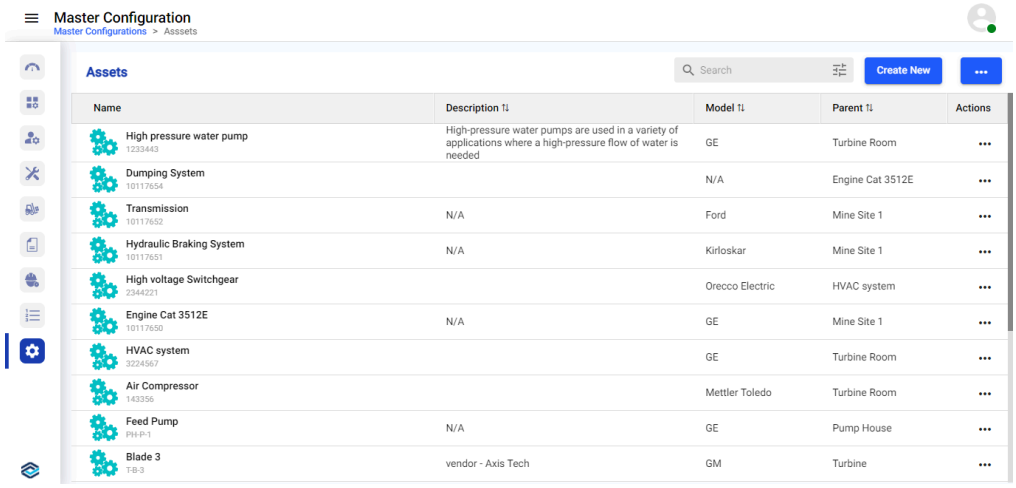
   Click **Sync from SAP** to manually sync and export already created data from SAP server.

   Or

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

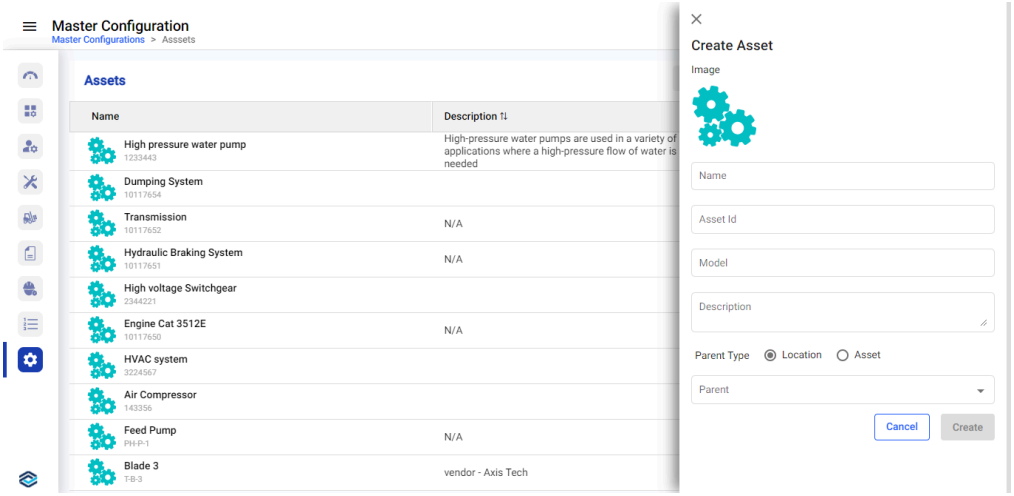
   Note:
   There should not be any existing master data to sync the data.

   Figure 4-7 Assets Screen



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

Figure 4-8 Add Asset Details



3. In the **Create Asset** window, enter asset details like **Name**, **Asset Id**, **Model**, **Description**, **Parent Type**, and **Parent**.

> **Note:**
> If the Asset ID already exists, an error message “Asset ID <> already exists” is displayed. Use another ID.

4. Click **Create**.

   The new asset is created successfully.

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

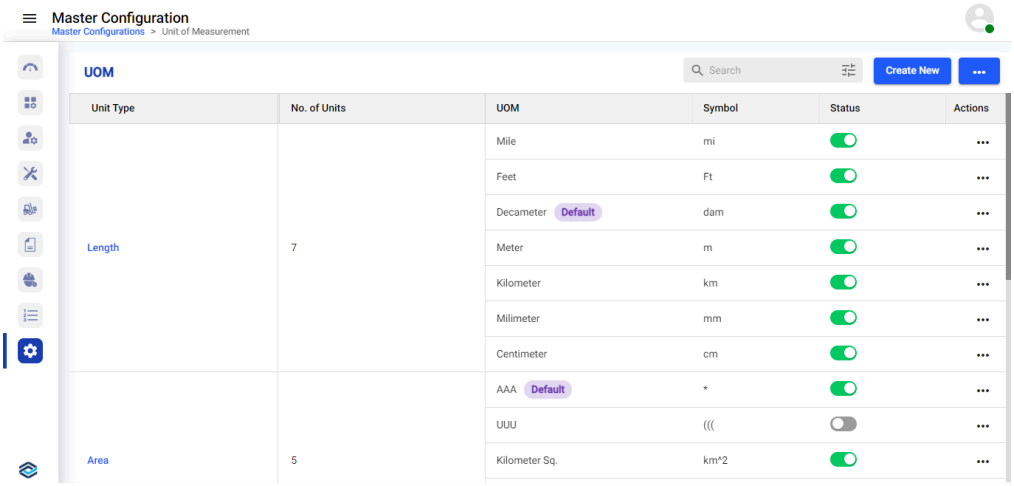
4.5. Create Unit of Measurement

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

To add a unit of measurement:

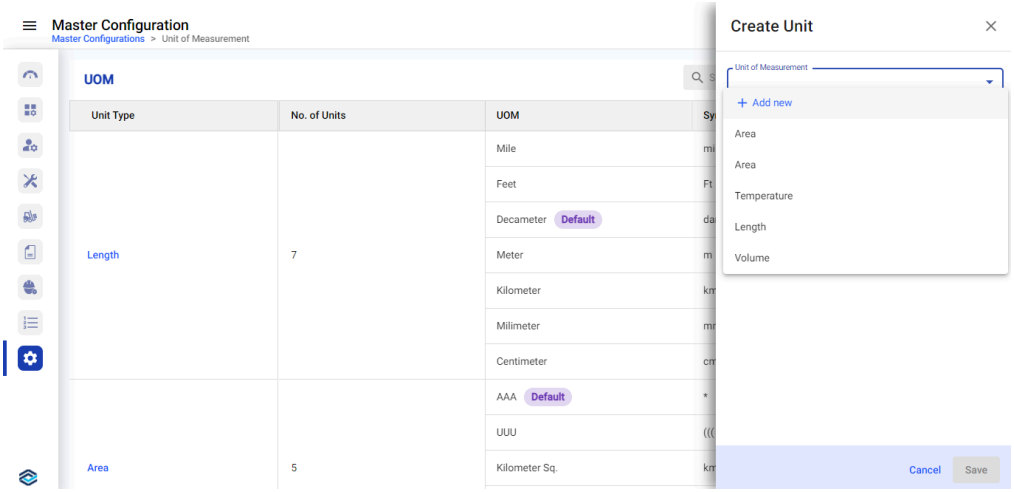
1. Click the **Master Configuration** module on the left side pane and click **Unit of Measurement**.

Figure 4-9 UOM Screen



2. Click **Create New** and select **Add Manually**.
3. In the **Create Unit** window, select the measurement in the **Unit of Measurement** drop-down for which you want to determine units.

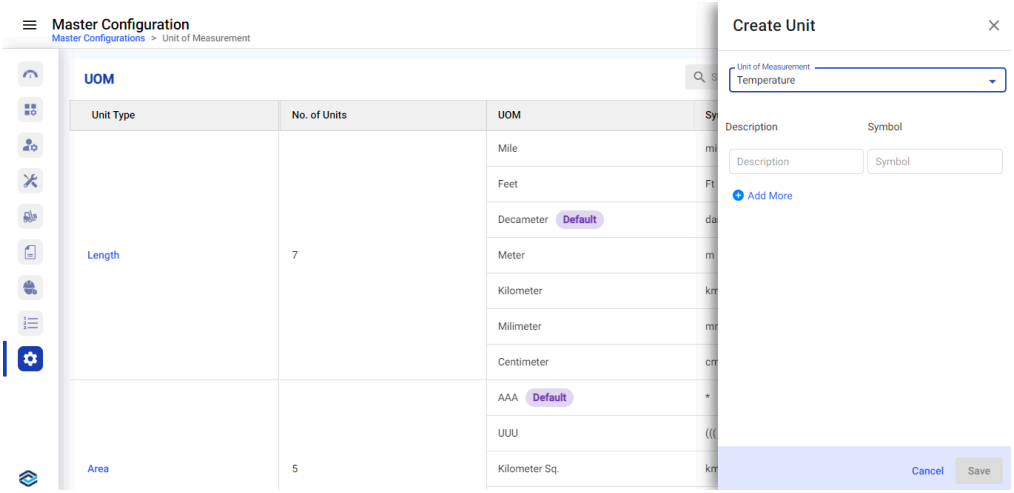
Figure 4-10 Create UOM



Note:
If the measurement that you need is not present in the list, click **+Add New** and enter **Unit Type**.

4. Enter **Description**, and **Symbol**.

Figure 4-11 Add UOM Details



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

5. Click **Save**.

The unit of measurement is created successfully.

Note:

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

4.5.1. Activate and Deactivate Unit of Measurement

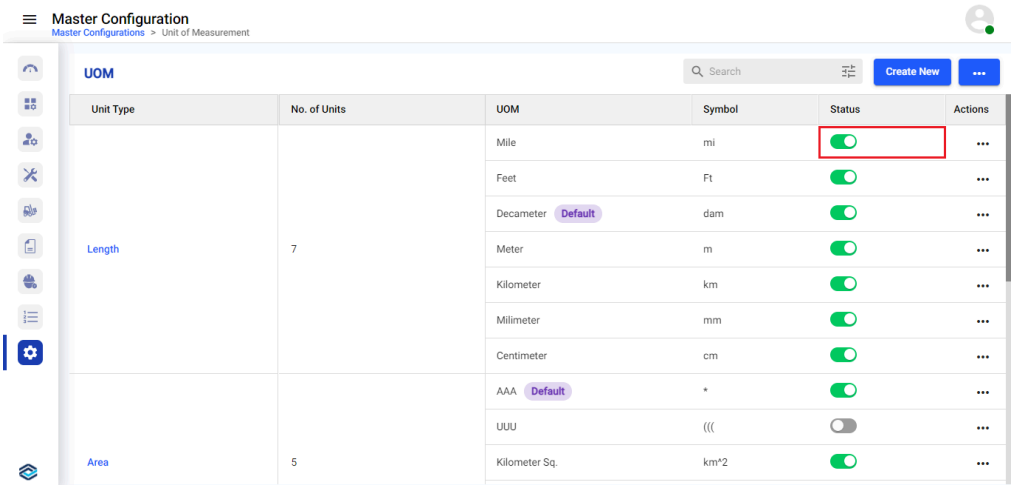
To activate/deactivate unit of measurement:

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

   A message UOM status changed successfully appears.

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

Figure 4-12 Activate or Deactivate UOM



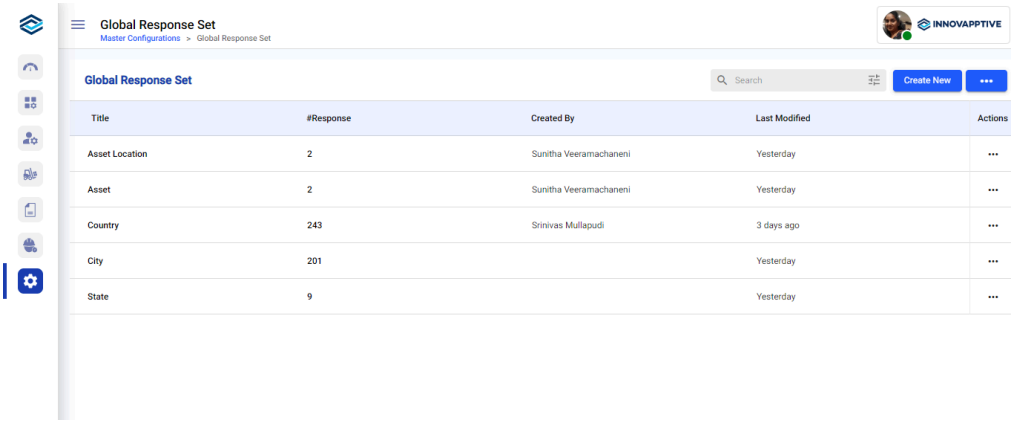
4.6. Create Global Response Set

Global Response Sets allow you to create predefined answer choices for forms, inspections, and work order documentation. Instead of manually entering responses, technicians and supervisors can select from standardized options, improving data accuracy and consistency in reporting and compliance checks. For example, if the Response Set is created for Country, then the responses are all the countries that can be selected from the drop-down.

To create or add global response set:

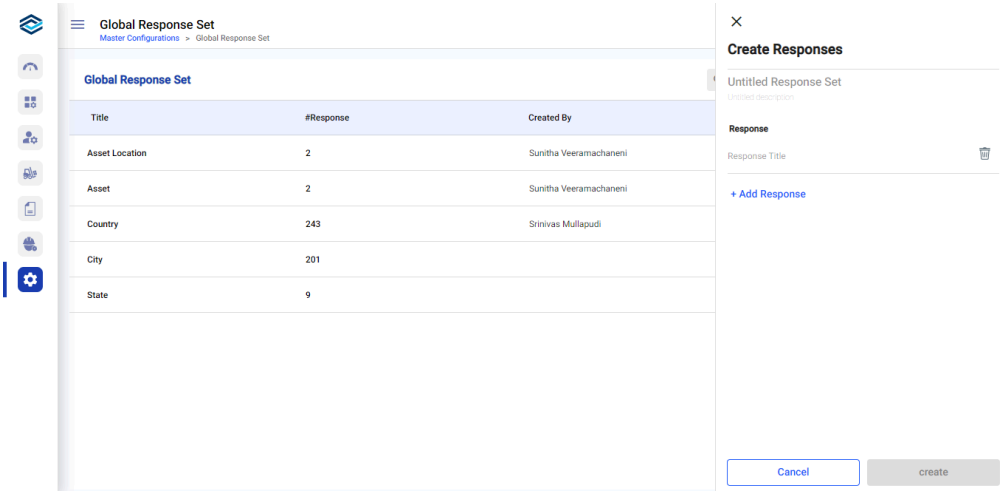
1. Click the **Master Configuration** module on the left-side pane and click **Global Response Set**.

Figure 4-13 Global Response Set Screen



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

Figure 4-14 Add Global Set Response Details



3. In the **Create Responses** window, enter the title for the response set and add response titles. Click **Add Response** to add more response sets.

> **Note:**
> You can sort Global Response values in both ascending order ("A to Z") and descending order ("Z to A").

4. Click **Apply**.

   The response set is created successfully.

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

4.7. Bulk Upload Master Data

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

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

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

Location Master Data

To bulk upload locations:

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

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

Asset Master Data

To bulk upload assets:

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

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

UOM Master Data

To bulk upload unit of measurement:

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

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

Global Response Set Master Data

To bulk upload global response set master data:

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

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

5. Onboard Users and Assign Roles

Use the **User Management** module to create roles and so on, create users, and assign relevant roles to the users.

Once the Innovapptive Admin create the admin role and hand over it to you, as an onboarded tenant/super admin, you can create roles required for the CBO application such as Manager, Supervisor, Developer, and so on, create users and assign the relevant roles and permissions to the modules available in the application.

In this module, you can,

- Search users using the **Search** bar.
- Create users using the **Add User** button.
- Sort the values such as User, Role, Email, and Created AT using the Sort ⇅ icon next to the columns.
- Group the roles using the More ••• icon > **Group Rows by this Column** option next to the Role column.
- Edit the users using the More ••• icon > **Edit** option.
- Deactivate users using the More ••• icon > **Deactivate** option or you can deactivate all the users at a time by selecting the check box and then selecting the More ••• icon > **Deactivate** option on the right.
- You can see the active users by accessing the **Active Users** sub-module and inactive users by accessing the **Inactive Users** sub-module on the left-side pane.

Note:
You cannot edit or deactivate the user if the role is Super Admin.

5.1. Create Positions

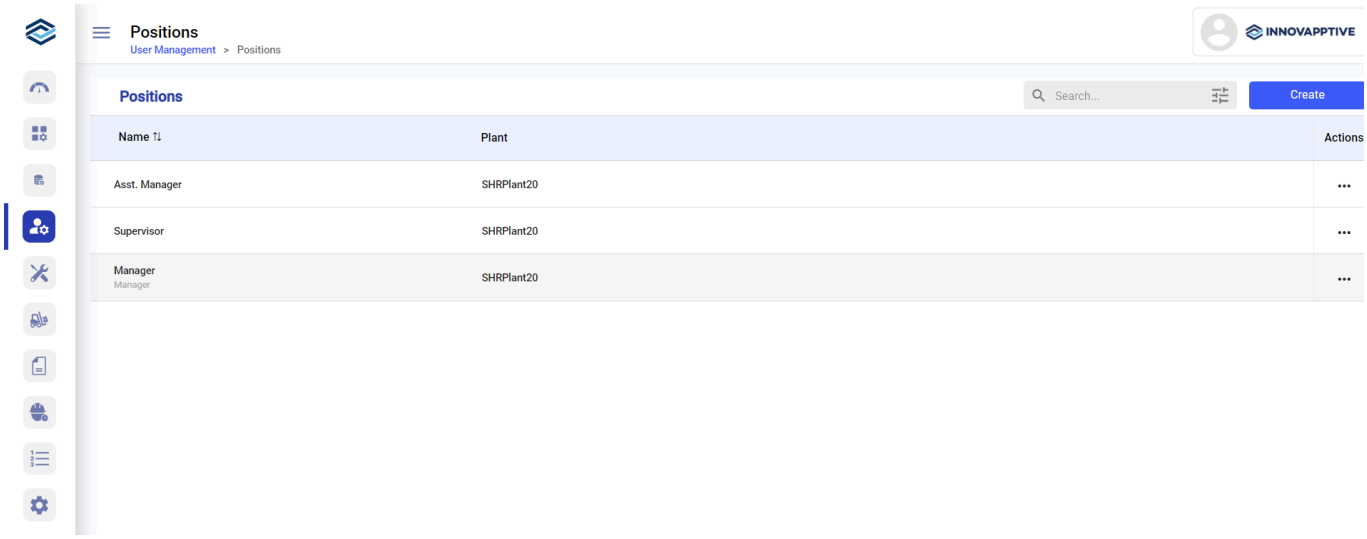
Create positions like manager, supervisor and so on and assign users to them.

To create a position:

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

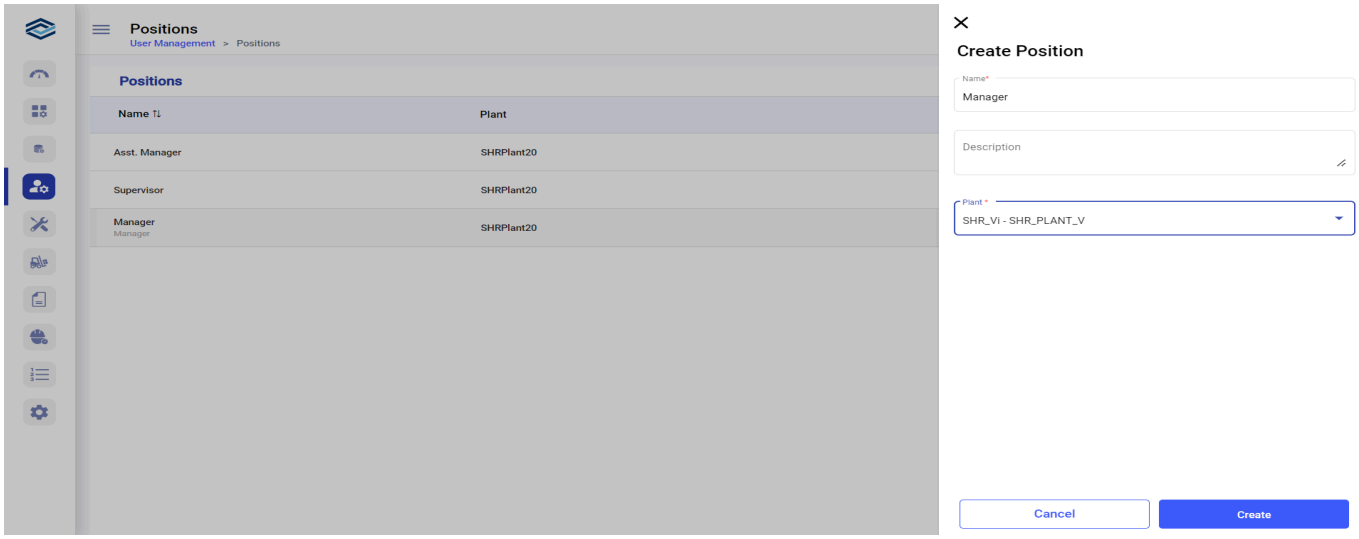
> **Note:**
>
> To see the Create Positions module, click the Hamburger menu on the top left and then click the Expand icon next to User Management.

Figure 5-1 Positions Screen



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

Figure 5-2 Create Position



3. In the **Create Position** window, do the following:

a. Enter the position name in the **Name** field.
b. Enter the description of the position in the **Description** field.
c. Select the plant from the **Plant** drop-down.
d. Click the **Create** button.

The position is created and it is displayed in the **Positions** screen.

In this screen, you can,

- Search the positions using the Search bar.
- Filter the positions based on Plant.
- Edit the position using the **More** icon > **Edit** next to the position.
- Delete the position using the **More** icon > **Delete** next to the position.

5.2. Create Roles and Assign Permissions

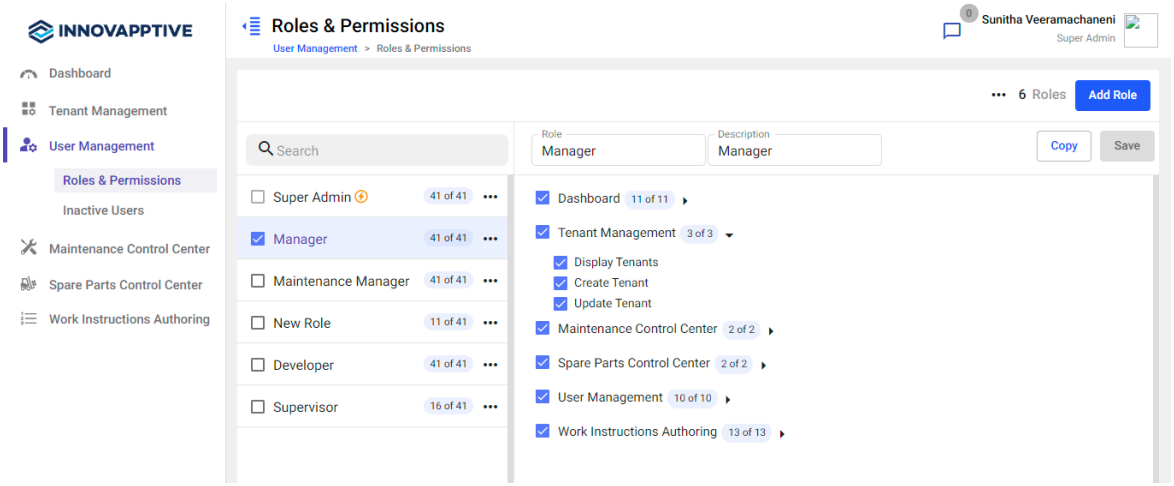
Roles and Permissions define **who can access what** within the system, ensuring secure and efficient workflow management. By assigning roles such as **Super Admin**, **Admin**, **Supervisor**, **Manager**, **Operator**, and **Technician**, you can control user access based on job responsibilities.

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

To create a role and assign permissions:

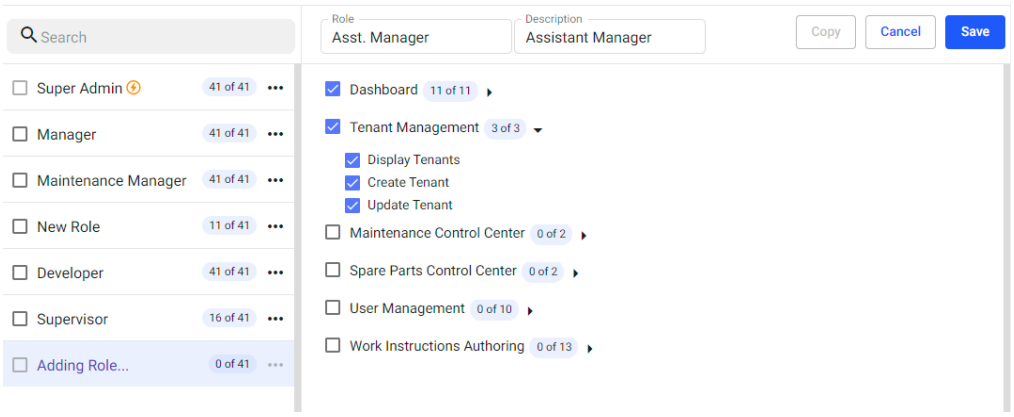
1. Expand the **User Management** module and select **Roles and Permissions** on the left-side menu.

   Figure 5-3 Roles and Permissions Screen



2. Click the **Add Role** button on the top right.
3. Do the following in the right section:
   a. Enter the role name in the **Role** field.
   b. Enter the description of the role in the **Description** field.
   c. Select the modules that are required for the role.
   Expand the down arrow icon to select the sub-modules.

   Figure 5-4 Add Role Details



4. Click the **Save** button.
   The role is created and you can see it on the left section.

   In this sub module, you can,

- Search the roles using the **Search** bar on the left-side section.
- Copy the role using the More icon > **Copy** option to create a new role from the existing role on the left-side section.

> **Note:**
> You can even select the **Copy** option on the right-side section to copy.

- Delete the role using the More icon > **Delete** option on the left-side section or you can delete all the roles at a time by selecting the check boxes and then selecting the More icon > **Delete** option on the right.

> **Note:**
> - You cannot edit or delete the Super Admin role. You can only copy.
> - You cannot delete the role which is already assigned to the user.

- Add a role using the **Add Role** button on the right side.
- Edit the role details or permissions on the right side.

5.3. Create Users and Assign Roles

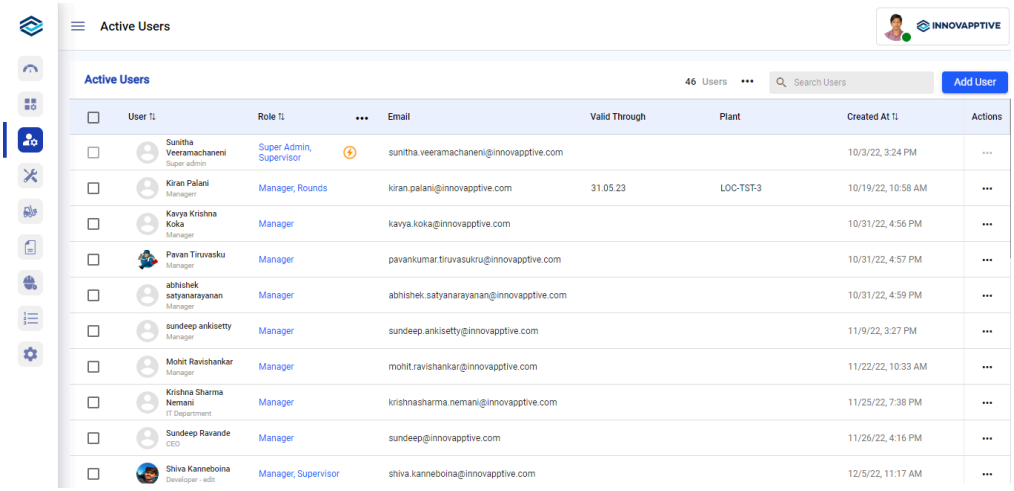
Creating users allows you to add personnel to the system and assign them appropriate roles and permissions. When adding a new user, you define their role (such as Supervisor, Technician, or Manager) and configure their access permissions based on the modules they need.

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

To create a user and assign a role:

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

Figure 5-5 User Management Module



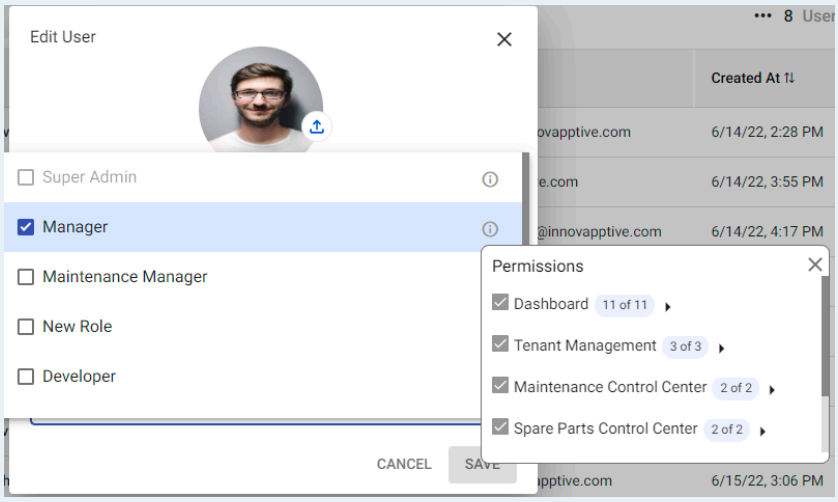
2. In the **Active Users** screen, click the **Add User** button on top right.
3. In the **Add User** window, do the following:
    a. Add the photo of the user.
    b. Enter the first name of the user in the **First Name** field.
    c. Enter the last name of the user in the **Last Name** field.
  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

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

    f. Select the relevant role from the **Roles** drop-down.

> **Note:**
> You can click the More Info icon to check the permissions assigned to the particular role.

Figure 5-6 Check Permissions

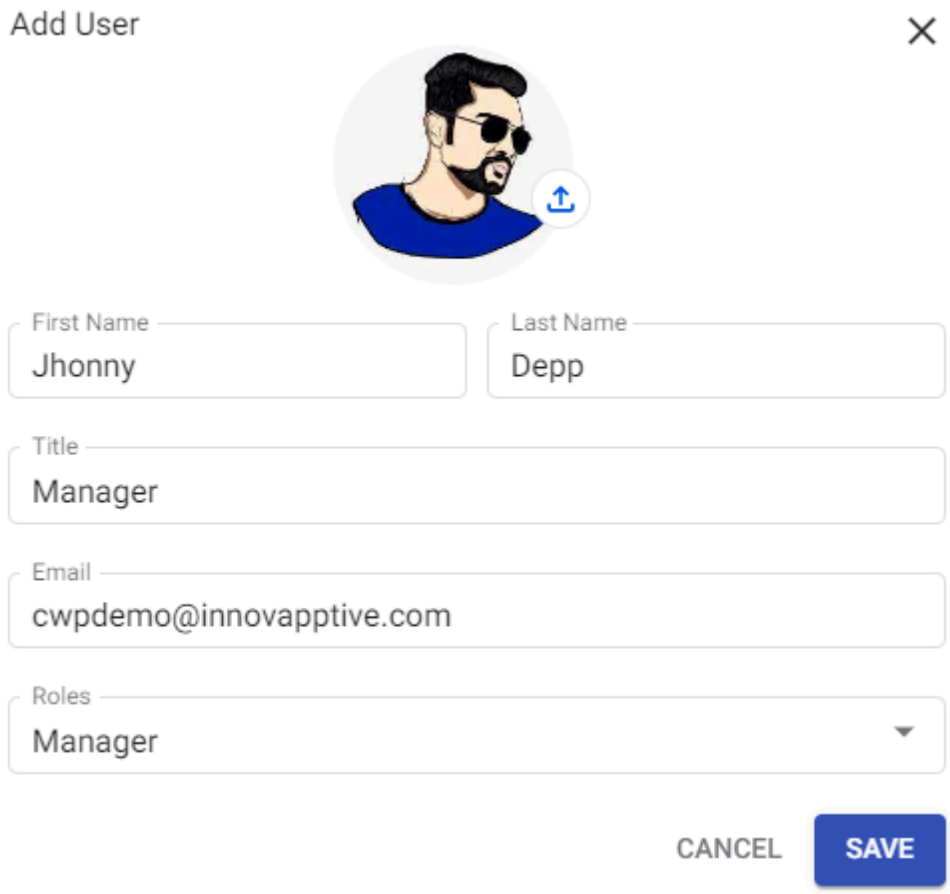


g. Select the user group from the **User Group** drop-down.
h. Select the dates from the **Valid From** and **Valid Through** calendars.
i. Select the plants from the **Plant** drop-down.

> **Note:**
> You can select more than one plant for a user. This enables the user to view rounds assigned to the user from multiple plants.

j. Select the unit from the **Unit** drop-down.
k. Select the position from the **Position** drop-down.
l. Click the **Add User** button.

Figure 5-7 Add User Details



User is created successfully. You view the newly added users list in the **Active Users** screen. To download the users list in excel format, click the More icon > select **Download Users List**.

5.4. Create User Groups and Add Users

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

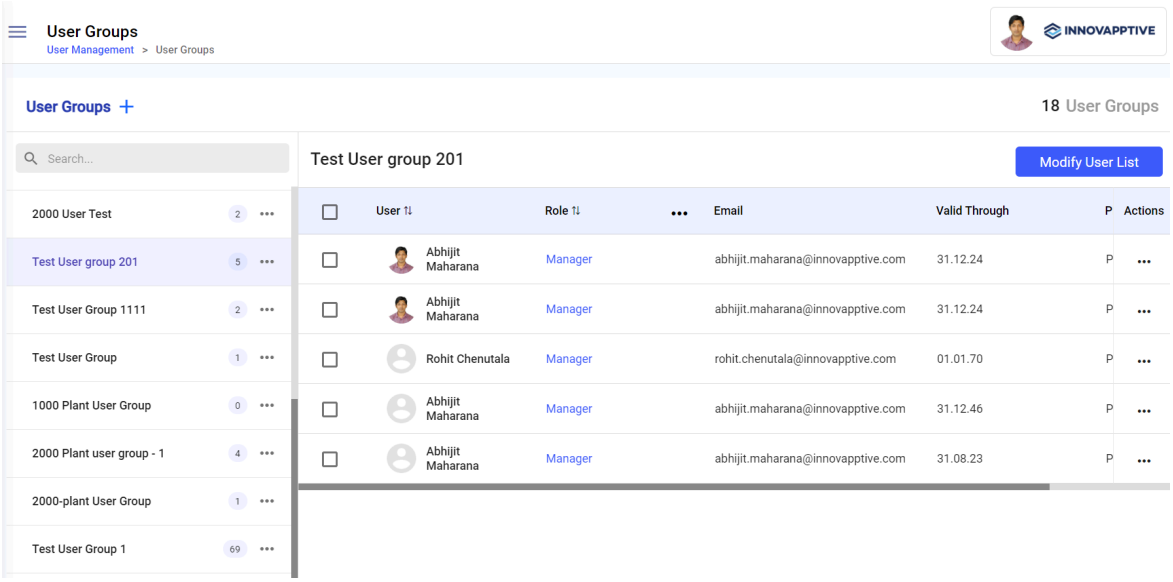
For example, all Technicians in a plant can be part of a *Technician Group* with predefined access to Work Orders and Issue Reporting, while Supervisors in a *Supervisor Group* may have permissions to assign and monitor work orders.

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

To create a user group and assign it to user:

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

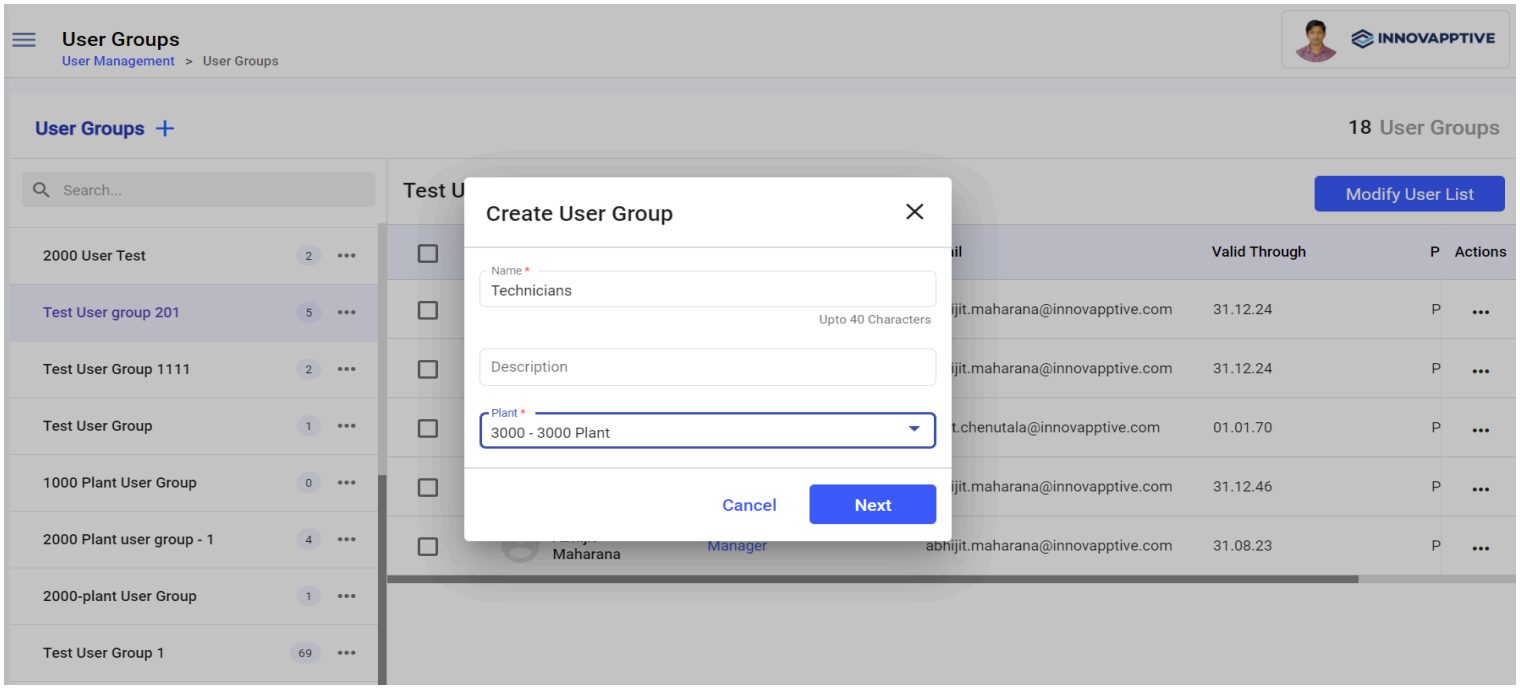
Figure 5-8 User Groups Screen



2. In the **User Groups** screen, click the **Add** icon next to the User Groups.
3. Select the **Position Based** or **User Based** option.
4. In the **Create User Group** window, fill in the following details:

a. Enter the user group name in the **Name** field.
b. Enter the description of the user group in the **Description** field.
c. Select the plant from the **Plant** drop-down.
   Expand the down arrow icon to select the sub-modules.
d. Select the unit from the **Unit** drop-down.
e. Click **Next**.

Figure 5-9 Add User Group Details



5. In the **Select Users** window, select relevant users and click **Create**.
   The user group is created and you can see it on the left section.

   In this screen, you can,

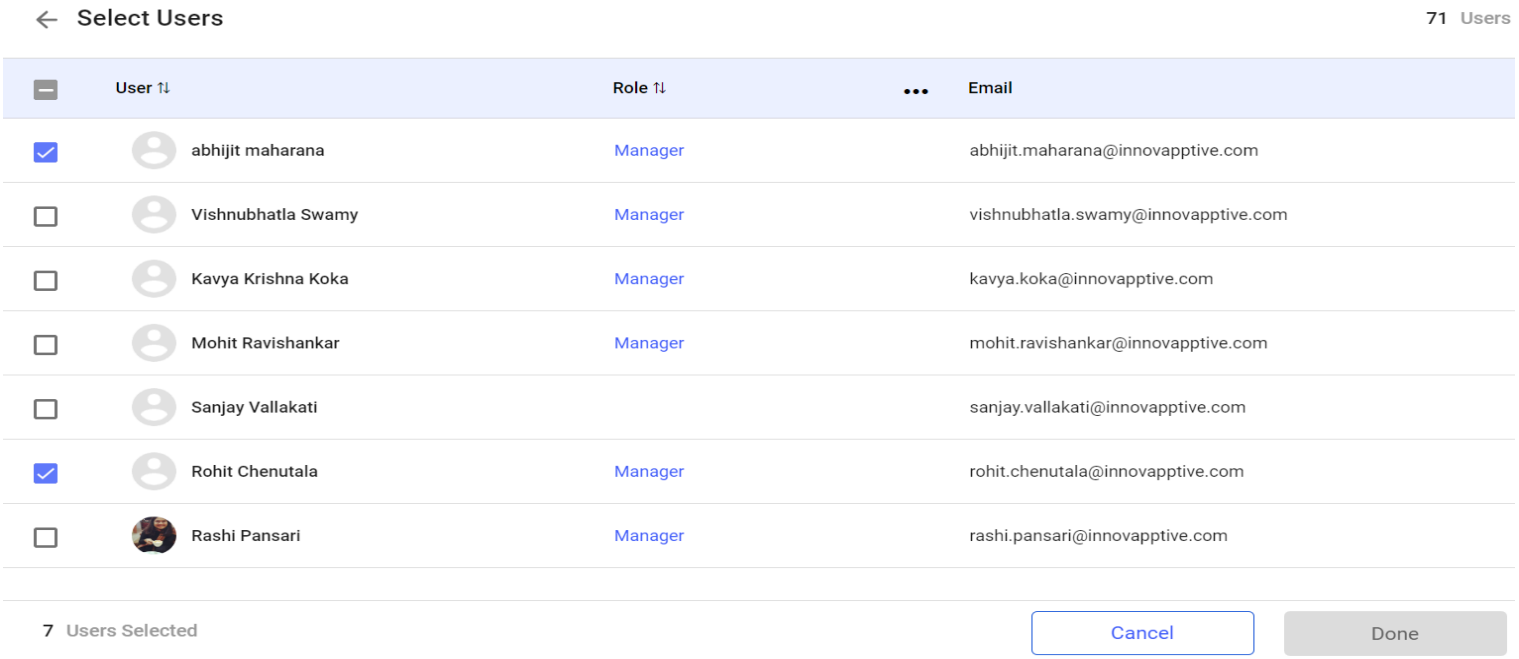
   - Copy the user group using the More ••• icon > **Copy** option next to the user group on the left-side section.
   - Delete the user group using the More ••• icon > **Delete** option next to the user group on the left-side section.
   - Edit the user group using the More ••• icon > **Edit** option next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

Modify User List

To modify users list:

1. In the **User Groups** screen, select a user group from the left section.
   The list of users associated with the selected user group is displayed on right section.
2. Click **Modify User List** on the right side.
3. In the **Select Users** window, deselect the checkboxes and click **Done**.

Figure 5-10 Modify Users



The users are removed from the user group.

Note:
You can also,

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

6. Invoke mRounds Tasks using APIs

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

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

6.1. Generating API Keys

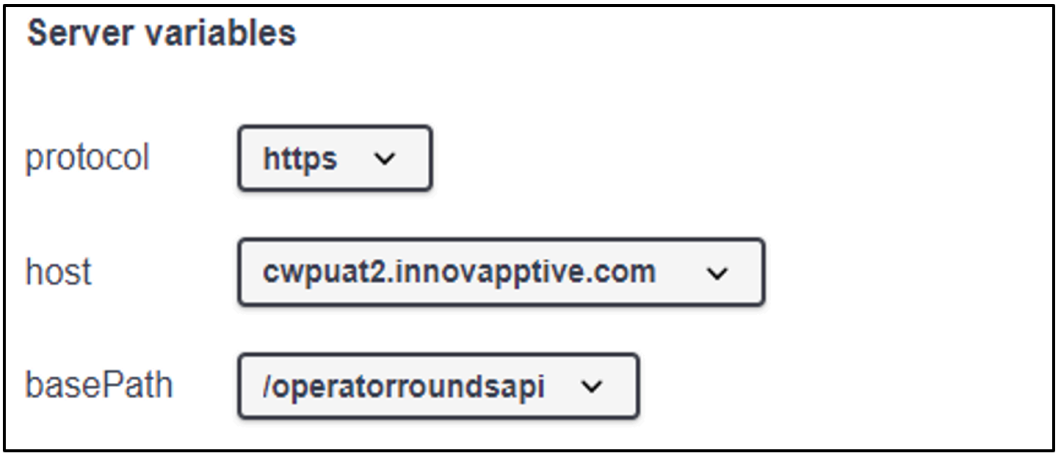
This section describes the process for generating API keys

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

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

6.1.1. Pre-requisites

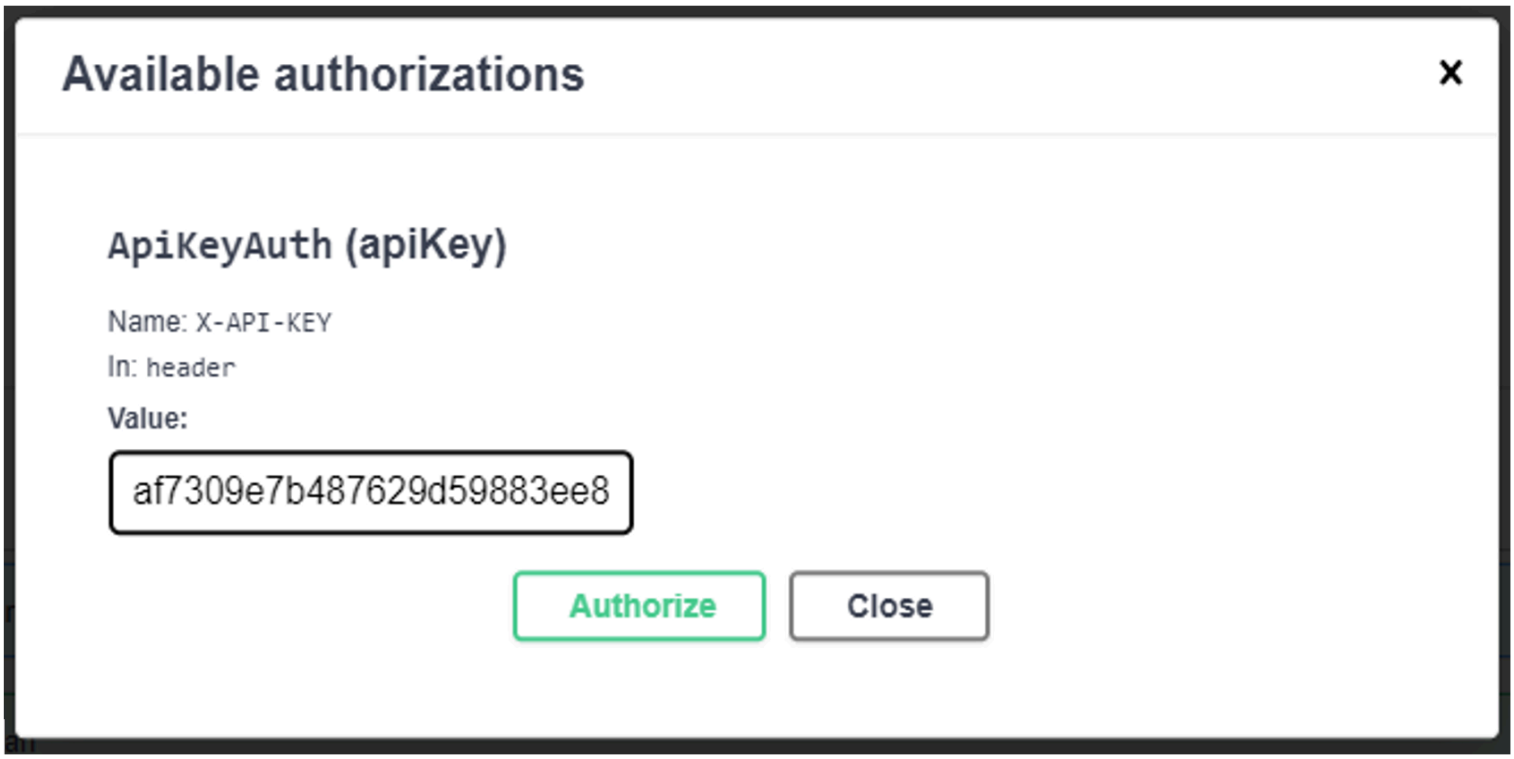
Use the following Request URL: https://cwpuat2.innovapptive.com/operatorroundsapi/external/api-docs/.



Host: Select the host based on the environment:

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

Authorize through API Key



6.1.2. Generate API Keys

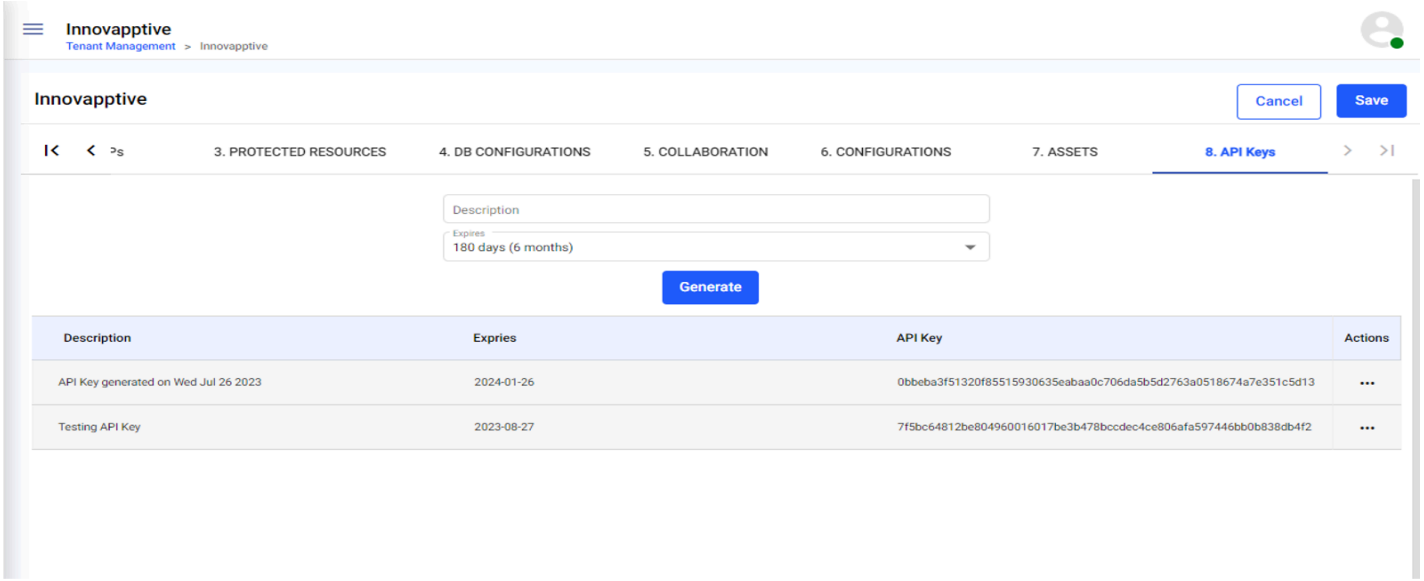
Learn how to generate API keys

To generate the API key:

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

6. Click **Generate**.

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



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

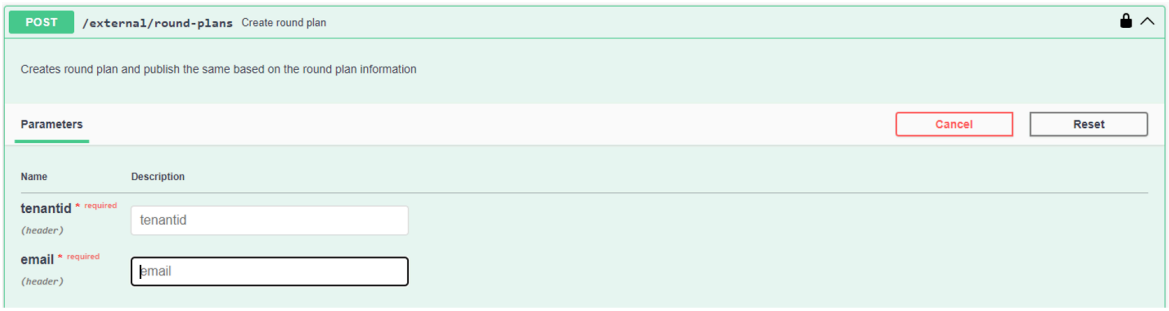
6.2. Creating Rounds using APIs

Learn how to create rounds using APIs

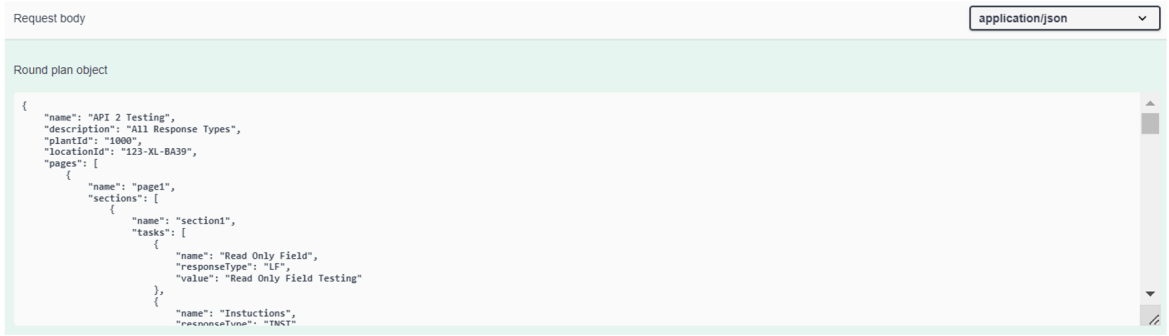
To create round through an API:

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

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



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



Note:

Please refer to the Request body JSON for Round Plan Creation Payload Formation *(on page 77)* section for more information.

6.2.1. Request body JSON for Round Plan Creation Payload Formation

Header Information Payload

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

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

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

Response Type Configuration Payload

Read Only

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

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

Instruction Response Type

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

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

Short Text Answer

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

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

 }
```

Long Text Answer

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

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

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

Number Response Type

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

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

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

Global Picklist Single Selection

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

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

Global Picklist Multiple Selection

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

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

Scanner

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

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

Date & Time

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

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

Hyperlink

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

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

Check box

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

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

Signature

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

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

Photo Response

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

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

Geo Location Response

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

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

Date Range

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

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

Multiple Choice

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

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

Slider

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

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

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

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

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

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

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

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

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


6.3. Dynamically Generate and Partially Execute a Round

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

Create and publish a round plan with tasks.

To create a round plan:

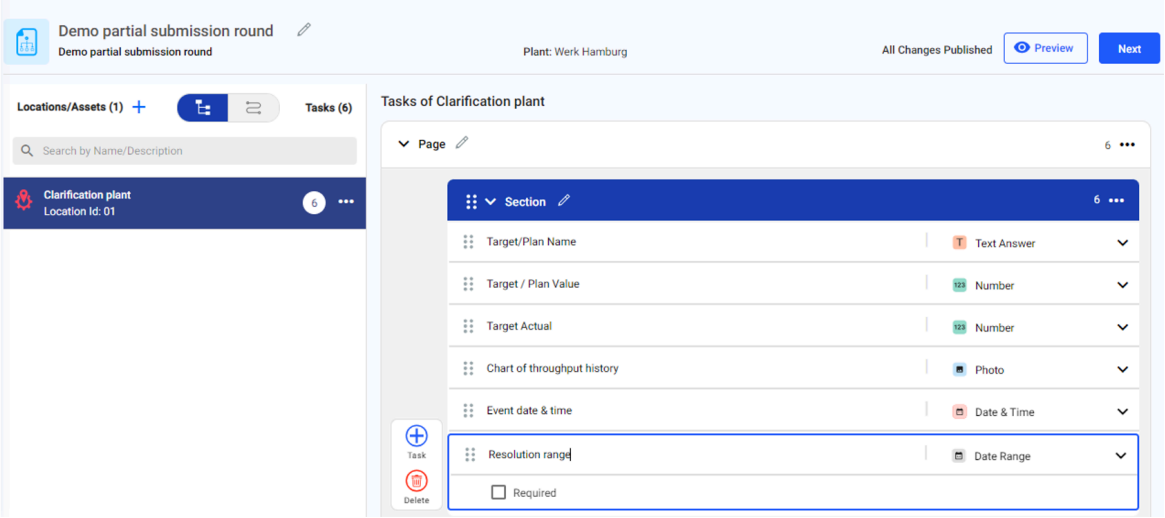
1. Open the **Operator Rounds** module.
2. Click **Create New**.
3. In the **Plan Details** screen, enter **Plan Name**, **Plan Description**, **Plant**, and **Tags**.
4. Click **Save & Next**.
5. Select **Location** and **Assets**.
6. Add required tasks for the round.

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

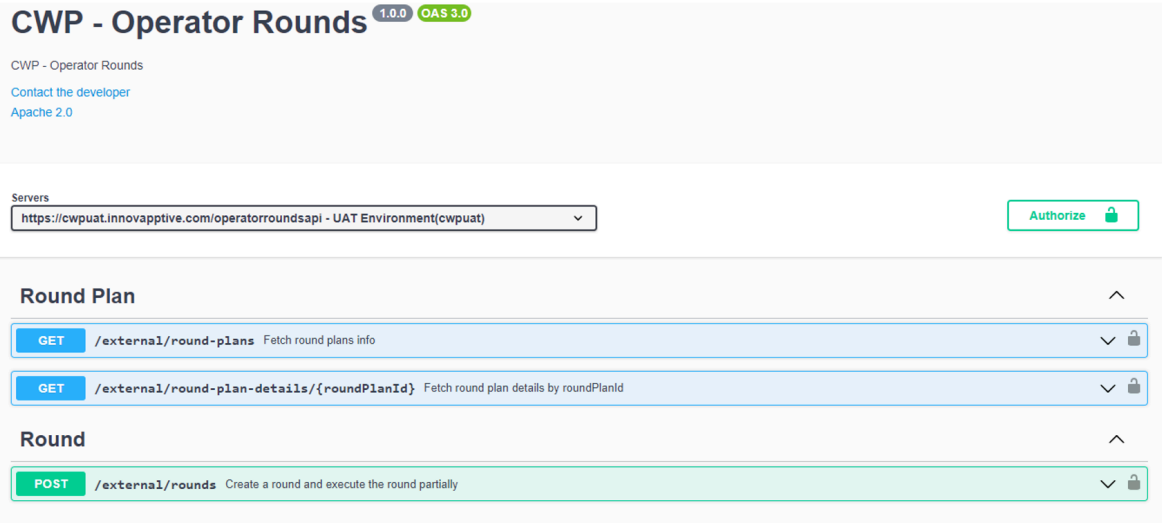
7. Click **Next** and **Publish**.

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

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



To programmatically generate and partially execute a round, see, How to get Round Plans List *(on page 92)*, How to get Round Plan Details *(on page 94)*, and Dynamically Generate and Partially Execute a Round *(on page 90)*.

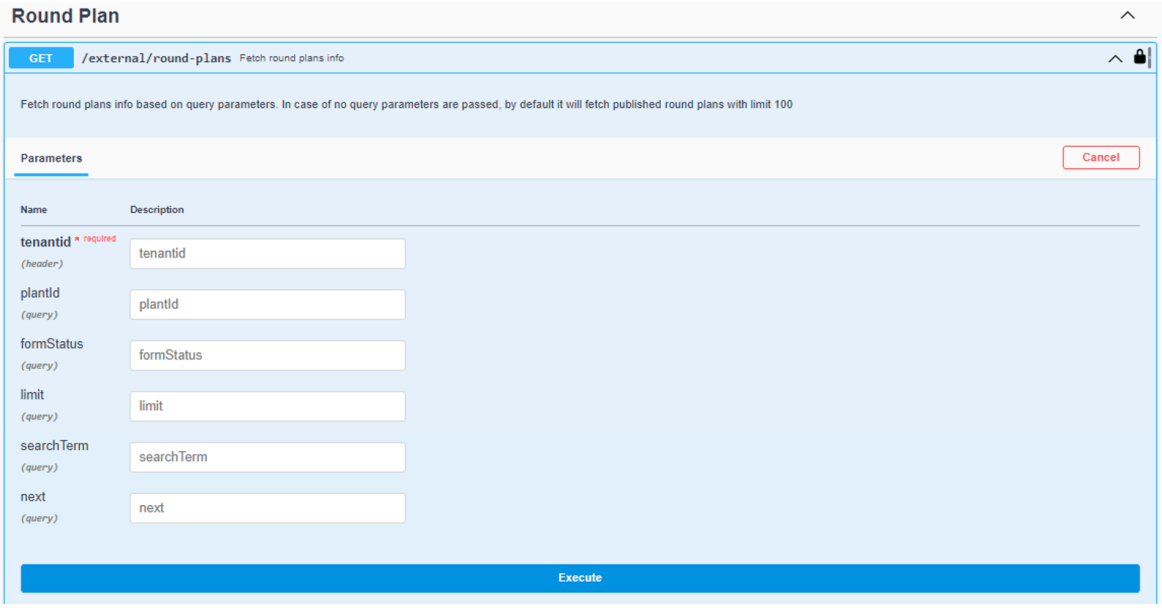


6.3.1. How to get Round Plans List

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

To get the round plans list:

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



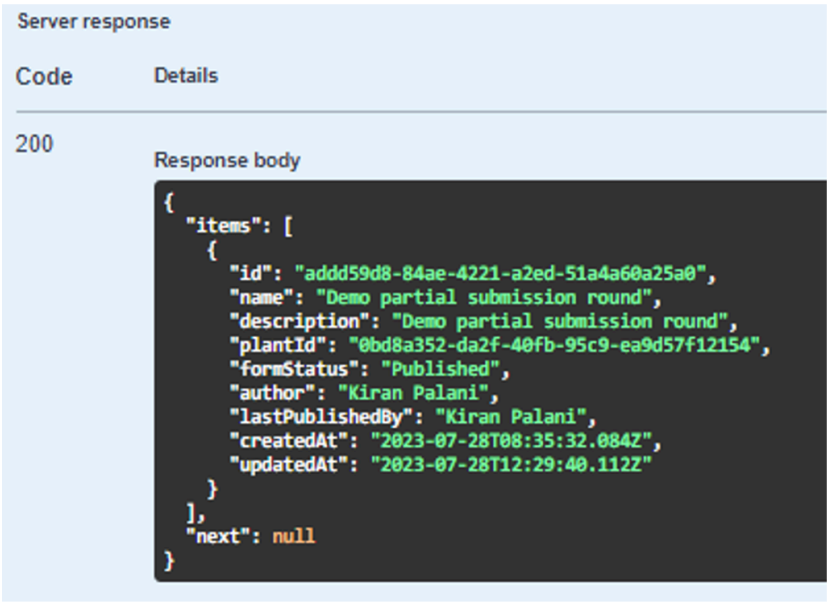
3. Provide the following request parameters:

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

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

4. Click **Execute**.

   The following response is displayed.

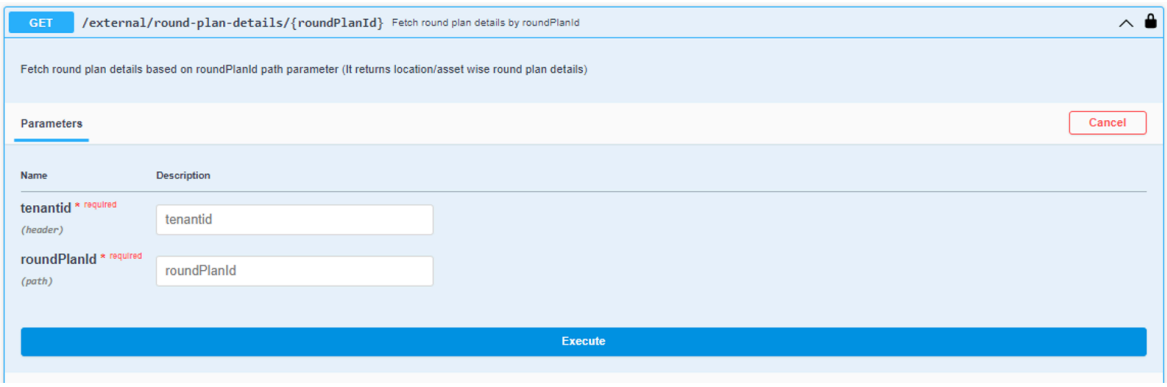


6.3.2. How to get Round Plan Details

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

To get the specific round plan details:

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



6. Provide the following request parameters:

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

7. Click **Execute**.

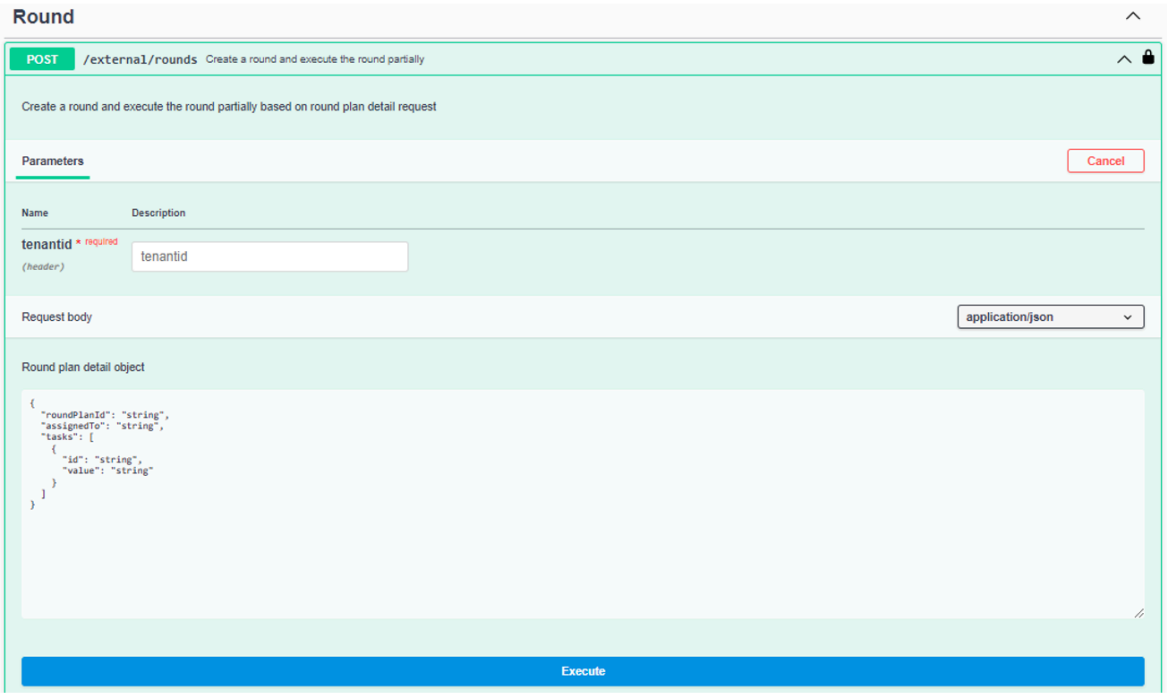
   The following response is displayed.

6.3.3. How to create a Round and Partially execute It

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

To create and execute a round partially:

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



6. Provide the following request parameters:

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

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

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

For example,


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

vuFfy/+q/77/E/lB87P+L3pm3f7T/Af/a/8n/6f9T6W/J1/4/qhf4X1Hf9P0Jv1X/gfuD8Bn6zenj/b/c300/tn/I/bX3K/1P/N/+//U9rjwP
0p/fYKlxfZ/+X/Y/vB/p/eu5D71/mH4P/Rf9n/K/u19s/9r/8eKPt3/V/br1bOov/N/nv9d+53ym/7H/x/3n+++M/8s/2f/
w/1/7//737Gf1u/7X+K/1Xwn/9H7kfC794PVz+4v7f/8f4TP/P+7///+T39O/7X7m/9/5Pv6b/xf///1v/V8e/rW/+31af+/6K//q/eb/7/Mh
+5H7pf934Pf8//+v9r/wdcA+Sf9/zV/Nv7n9tfI38293j3o/z376/Ndnz7nP/X9s/Zj+h/q/
/D/nPZf9+X++9CfzT++9C/8u/rv/M/w3swTifEnL32X+av00P3/259zf1z/m+xP/UOSp/pf
+f2JP9J/vvVf/3//36efsD9ufdK/xROkMFe5lo2gs7bNwM97pbcWmJN/TtUi0b0hSm2m4Beb9ZNSnLhqqIlsvgxpXX/kr6Eofiqgnej0N8qWh2w
AHvI6zH3kvpzMzge/
ifarRFqB3pk23svtTPZAU6CVvzlPmTqCxslZiob1Pf5mDL55R0cb/pORjy7Gpt66wsJM60QdrMb6Tn/LvSKuNI6UvbkOnadGZwUsIOLK1eR1f1
1S/f2beC0HMaulWEel0oN84lPDVL7Q/9UYgVwEYPT1TgFDP+5qYrbKSh3A0Y1h7s6bdP22gmEQRXTEOgrBJzVMeJ/
0KyqanRKRuXsy/kiqvSoWXk2J3TDAr9C/Os2MkNLpsYLe95Q5OQuPxv6ENJJ+9FJ2f3NO8uumxEwNs4kcF5F8PwKSpvBgAj2a/4TfMQ+ggIZ2Zk
bAUGnxUocCgJ/b9UP1DOPBQxRaTwmr2OR86NtfXrDxPmL2vL4aOrnA49Ip3iXO/ndXkSQuoakY5KsBYd9R3DFwKMFy5h7JDYLd+
lmI21+A4pZcgrXPEfQLZ4sQorwlo+xsI/xQY
+7KwVhwfBW3foC4GEDACxLEysdcDQs7wSw/AM91HOgwUOnsjk63VBXgJ7kkHnl6Yr+UMTe3DRGf5rA77N47ocoJdabVuQnrXsWHv5TOsTNV0uIu
YXMXnk1FIMcaaBGMY64Qw1a2IApuAS2ff3cuF6sq0PH5bKaTiheIOs5ihkooATgVPI8gTtm2r7TX+hpvJqvZbX7HWngIQ1NBD30sTLsGs/YHuU6
RbT0Fclxu6qtfeZuENNymcB6kGSMY5Gmmo5vbTnFe7f4IpLYGtgrHxBb/Gw08LVKf+cYshCpAZnCEfC3bmrYcuHWAsmFIvFCtR20bY2uvbNnSrl
jMTjXJytAhVTmVGXHNTQ3e/Fdif5kQkohjImVmeAOsjh0TK5ZnwVWPskhHHDuHjJ6Rl69FMKZWh89vJeAml9YZXN0SRW38Ls02KuQUq+HY6mHAl
zBO10OspstaLcGMUMpMtuzJZjDjSNXz4/Pd77LwcFA32P4vjJVTJoUpR83LmEMaeGGhv7TkgpRBRi7y/1m0K79TKl1+lZ0U4H8LYYAZ/Rj0W5Hr
awxRJZsNZQpA8Fe0yPVwBEZo3zBTJ5UeQ15Biu3Pg8MRNXI5qKPq2DUE9G33iMKRGmW5oG/HDN
+iIMmbhs5C3B9HAOhxjqLlTXH+h1+htXOOxzesp4htwaDDYKP+LToDekuc7vY4URlMjiCeOPZIOPSHE4U8rTVSOdSUC5UaNjXhUuaQnEHnKrhD
3xj+c6IJbRefXSH2vC66pmaiO/5a5gXaIWbXXOCP+zOLaOwNee8OB8qtM7hhngmChVWlNzDZPJ7R1O4clSCg47c5cPc0VVsPcwYbplcnQRH7y2h
UbGAiEtAOLIKpWnrNKiz28soe2uvd+KsFRhJI8Lw/jLMAoS04zF0/kBaEDCP7Fjy9YYzT5O1V41rGhnt6kcqW2uTLhvmEluxvEHl/3AcmTYFtut
Bdssn6N2NLwRF8BQV3lKHdKFOwNf6Awq4C62jicHK2kiPeLycONb3Osjf4A4fv9LD9UtfKnxR/UHslVydidMCLp/a0pRQHQseki4mdHL/+eumIP
MZ6/lOQZOP5oqROXoQjPzEjdo4NR3BkpfmpohLDxZxGR1tfWGkOe+FJx8HngIoqZA5ifuseg0r54oPkIx9ZUxmAS/uLAIs8WW4MNsFGCHc70i
MpF+DHM1TSYVppJt45KADZWRqJyZKWELFwXoPGybHmPG5Wjg7h0CRGVUU3uL1nQIzdREhEs2aWlQJWa5fTmg1r6JHLEiyBxKcJL5vcNalJqVEml
rtXOPBn6Wj6DxRsORhAhvOLWt53OXD3kdjDqJ2dmxTxfLQVDPLd33JbzQie/RuMmchgFE/2LItJHMupVThtAO/xQKZExHZyE6NofKzo0NaQXktK
499m4A+nPcyNoZWe6rAfI/NQQ88RzN9Fc0B7L08GDlbYvb01hYZCffiTctERhB5e6cgpCT9Yak+xTh0QoX4occ/H7j7gy9PUncFmdowGPiiK8Zh
yq61U7UvTJ78GCZ6JSmySamNQaA+kZwUQ7G1EHlVRccsS6ZViEcKXJpTPQyrvmhdgyWq/cKteAfvdFvywSLe2D/mgo5JXifVJUJcScI7QCc+bDZ
8OgGgaCz6ln/hMIBKsnxNWjQHtgutmxsd/m9vqVzEKh6sGspJUlgwE9RVBUgFZMSllXVK/KzNbanxnwvvfkBh+K22io2ZI1SJwMSLpOGmMua7Bc
TQI2JqfAxfC/2K/pCDc/HGBWuEq+la2FppHfjzfSIIGF1Ffm6q4pOuf7mb7iuoDaL7qu4rVFd7l+oP71lWrpNa1ZguPOU/dNNqKuD/lKsyWf18e
hDa1XdyyZ6Yizh+Nt8gGO+n5nRoP8WHJ2NBOQN97t8z5i/J6dL/Y/+zQxJdogSZS/chvti15o+Dlyxvd4B338cji3afxlaquOY3qgbzHGeSg/m2
5Ss3Mle9DmXfRrWZPZqs5OOkeaFX6aji4WrQzAQaHCECzQhkEpyVwhyKwO9XhqhGH+JP5TWZEuF9yfHM0FHoXP9nSX6sF2PFZ+3KiIoER7Bbr
rE/xDubfj0yLAP7M+XoqrEeU5C+30GLtr9fGy6t293l4KdnXV3WnoLf2wLuTOsaGkSMekFhLJAh9Ec3l1AHBaiU/b1YPQiXPTKZLqRpc9MiYNml
yQ8tIjUJHEF9TWQB6kxHYxbdkGB4O9ONfB24G1KWIlMnKsXsvUd2/GojPcpkNK8R2U7nbpEiJ18FSdDIXzc4VeCHj4hI/Elyxq7zoePw80v3QNr
doyO9TA/6//
BmRi8Tls0ghnJ2drwFhFQ22xSd2QOg0Hr7L/WzAtd3nRr7a3pHgHcr+7b/KeXrs8+6w/gUElO/FEr0Zts9+Y20mLKS4xqXaez598Q91N9IotXfE
JNIOMn5RgbSDP3iu0AFaT4JJCG1u03enO9t4mFj9E49Sp0ai+
+ajowV4GWGja7QcuCJTFJObN6JEZ3QdhG3MF9zR89br73ZyrlacFjDV6jqt2P831mvueDohmHDrEQJOilOUdknYwpf2rjqXKdEtGSHcINqYQP/w

```
8zr9MaiLYWcKEsvkrVz9Ly5qUV6pbsT/al7zFSltw/CbvFbsKRT3PlXH/kat3mHYLaglVExfokp1SAB1PMpJ3kWbWIRxcK4hqrbGaT3yIfByuns
dxYpbn71FKiqE6Wnnj5q9R/GNtUIf712T7og/yJuSNQEavXmT389vURvwGPak5W9llEBPItE1XEL1MXfY4iekE9Jw5lpXd3Se2pk82pKx1sQWKM
7MA9A9LcqzWj/WIpolad+jcTPqcz5N0NHOhTsLPUOWK9OE1DWguhXPPaSViNkA1qDTLtq+EPDW7WX2jjDD6GmPdB0BR3PzddMvuhKNpFd5HKMlG
TX2uHVDezJzrCda1yJSff8/Q/oubjW2JXY2A96VeMTUNoUof/vwbKoio+TCPtberb0qU0KeVQE00VA1fiRZ40956VtR24VXC5vF+DbdBetdh2b1
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```

```
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```

```
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    },


 ]

}
```
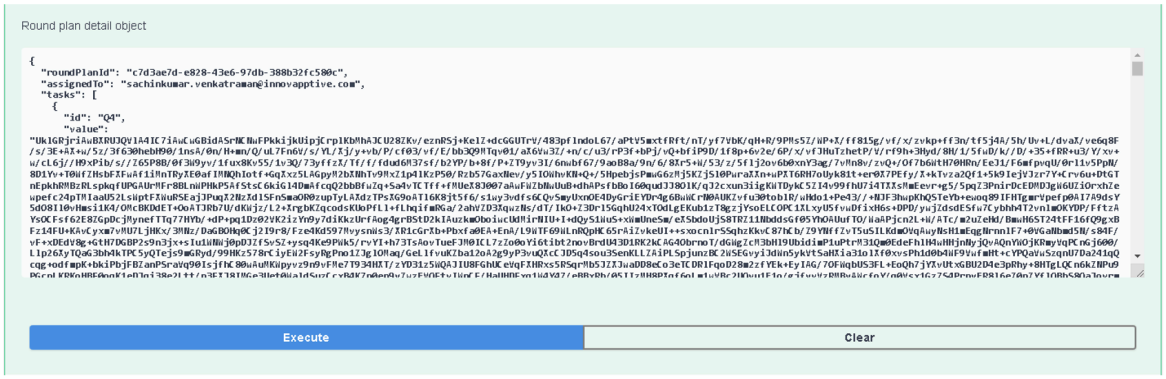


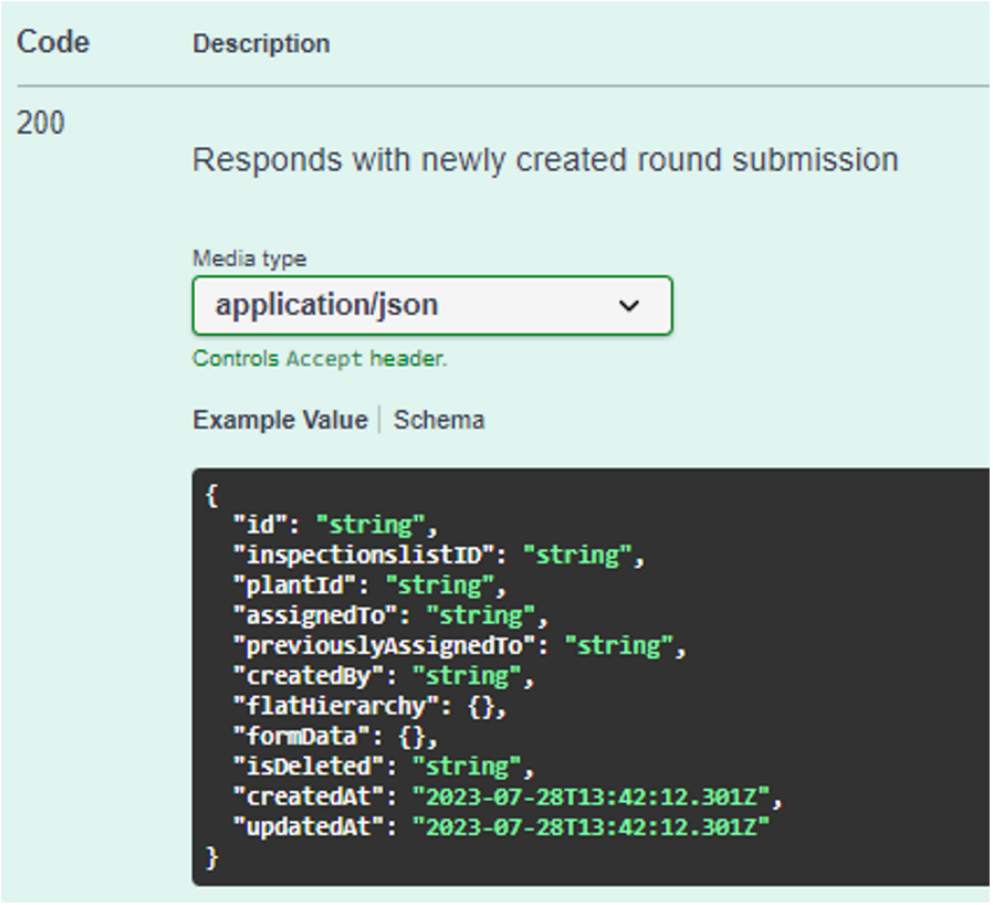
Add the base 64 string (id: Q6) for the image response type.



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

8. Click **Execute**.

   The following response is displayed.



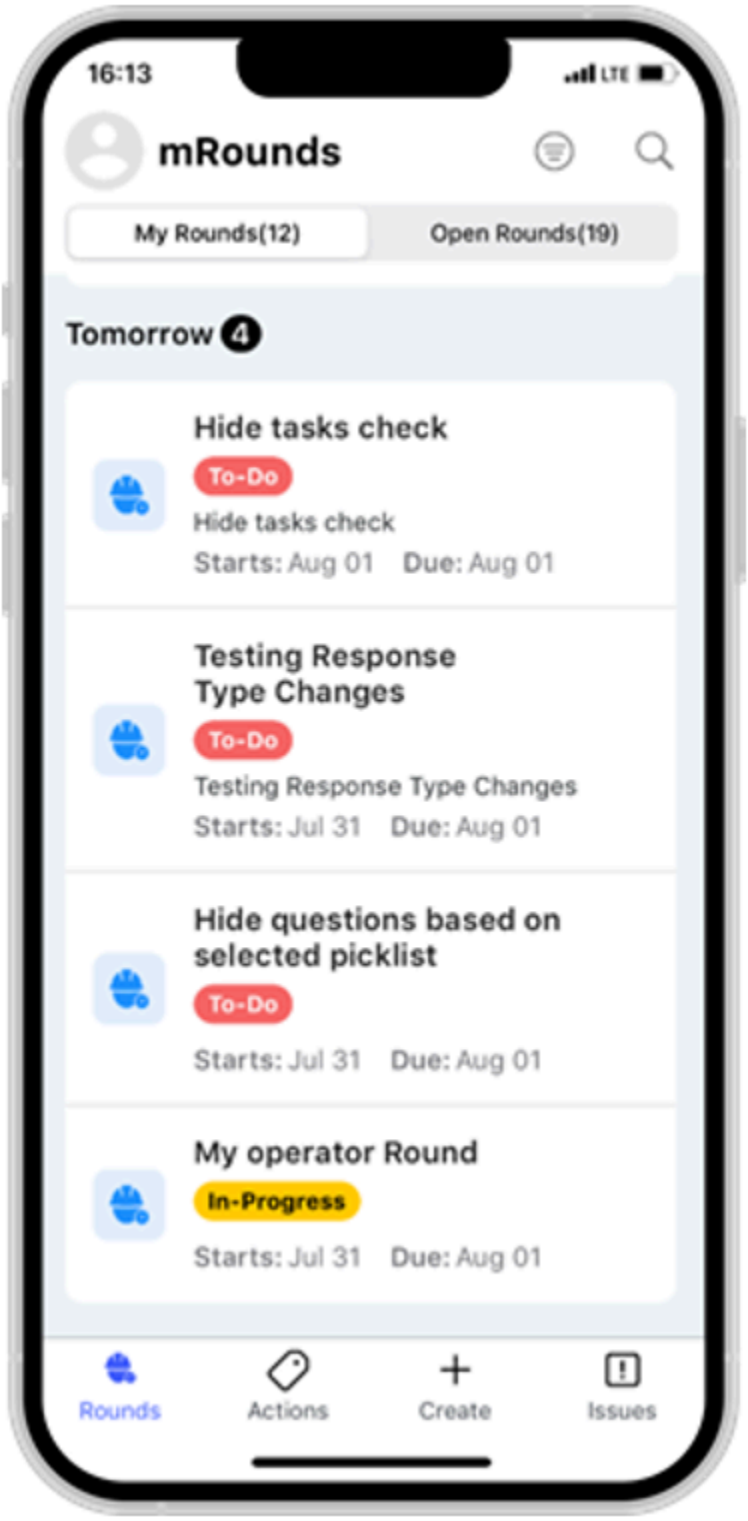
6.3.4. How to view the Updated Details in the mRounds Mobile App

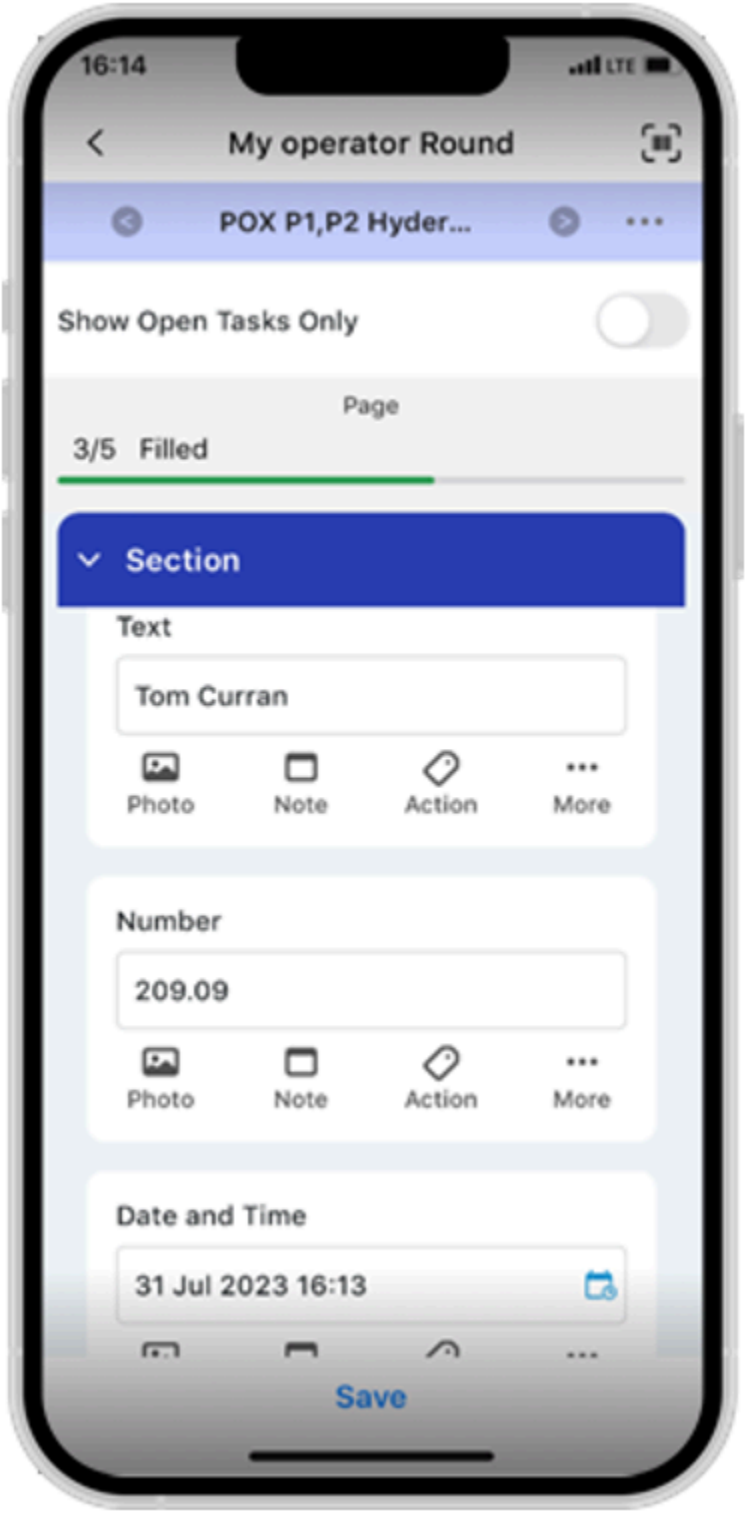
You can view all the pre-filled responses on the mobile application.

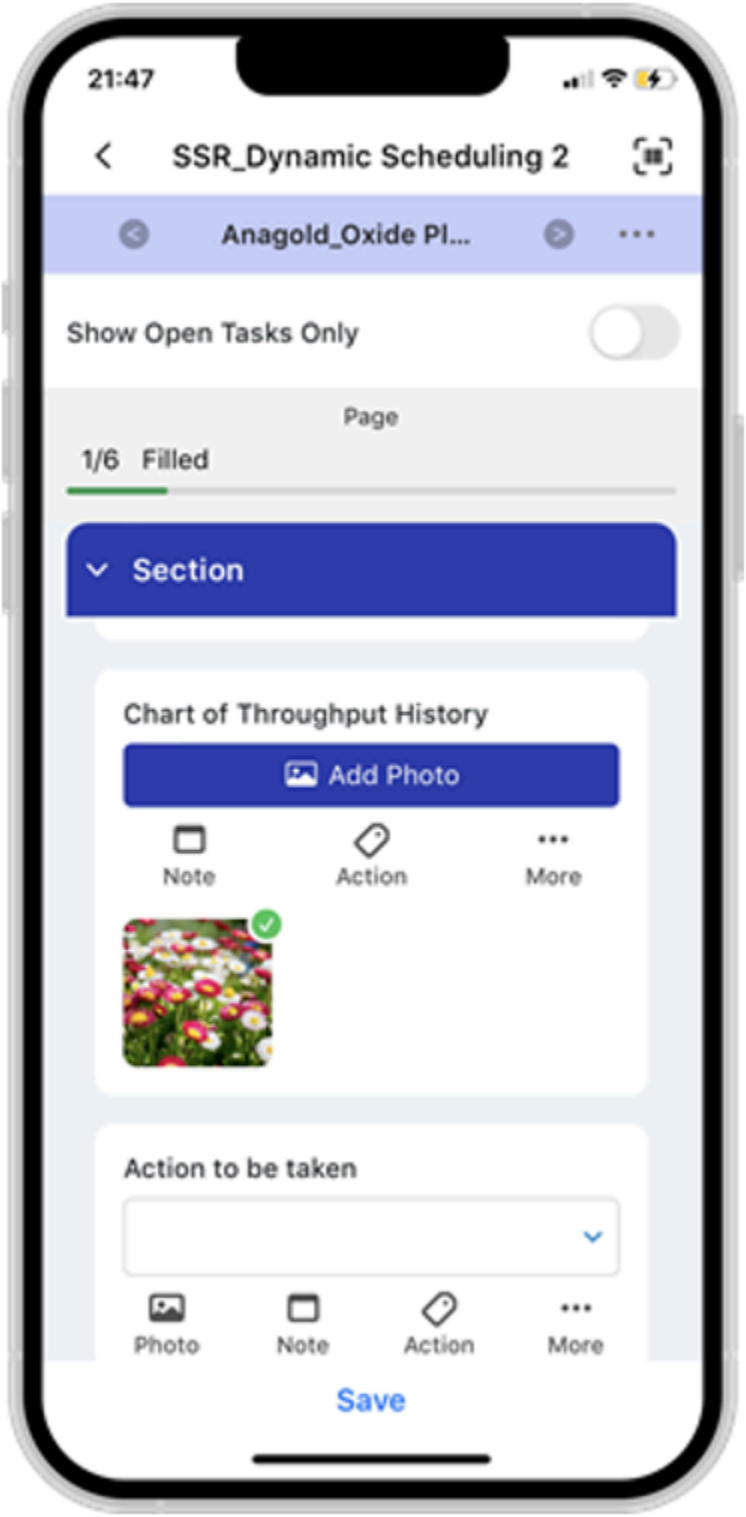
To view partially executed round details:

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

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


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


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



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

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

6.4. Understanding Error Codes

Following are the possible error codes:

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