iMaintenance User Guide for Supervisors

Connected Worker Solutions

Title and Copyright

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

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

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Preface

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

Intended Audience

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

Document Conventions

Table 0-1 Conventions followed in the document

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

Related Products & Solutions

- Work Order Management
- Inventory and Warehouse Management
- Analytics and Dashboards

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Contents

1. Introduction to iMaintenance

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

This chapter has the following topics:

1.1. Overview of iMaintenance Application

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

Key Features

Efficient Work Order Management

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

Intelligent Issue Reporting

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

AI-Powered Assistance (SIA)

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

Offline Functionality and Synchronization

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

Timesheet Tracking and Approval

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

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

1.2. iMaintenance Benefits for Supervisor and Technicians

The following outlines the key benefits of iMaintenance for Supervisors and Technicians, highlighting how it streamlines maintenance tasks, improves visibility, and simplifies access to critical information.

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

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

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

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

1.3. What’s New for Supervisors in iMaintenance

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

New Features and Enhancements in Release 2511

Table 1-1 New Features and Enhancements in Release 2511

View SAP Unit of Work Data in Operation Dropdowns (iOS) Display Unit of Work data from SAP in operation dropdowns with auto-default values instead of showing only hardcoded options. This gives field workers access to actual SAP-defined work units when adding operations manually and eliminates the need to reference external documentation. The dropdown automatically selects the appropriate default value based on SAP configuration. For more information, see Add Operations *(on page 76)*.
Auto-Populate Activity Type Based on Work Center (iOS) Set the Activity Type field at the operation level to auto-populate based on the work center configuration defined in SAP. This eliminates manual selection when adding or editing operations and ensures consistency with backend system definitions. The field filters available activity types based on the selected work center. For more information, see Add Operations *(on page 76)*.
Auto-Populate Control Key Based on Work Order Type and Planning Plant (iOS) Configure the Control Key field to auto-populate with default values based on work order type and planning plant as defined in SAP. This removes the need for users to manually select control keys when the defaults are already configured in the backend system. The dropdown filters to show only relevant control keys for the selected work order type. For more information, see Create a Work Order *(on page 71)*.

Table 1-1 New Features and Enhancements in Release 2511 (continued)

Filter Maintenance Activity Type by Work Order Type (iOS) Filter the Maintenance Activity Type dropdown based on the selected Work Order type instead of displaying all available values. This helps users select the correct activity type by showing only relevant options and automatically populates the field when a single value is configured. The filtering aligns with SAP configuration for each work order type. For more information, see Create a Work Order *(on page 71)*.
Display Dynamic Operation UOM Across the App (iOS) Replace static Unit of Measurement values with dynamic UOM data from SAP configuration across all operation screens. This ensures the Operation UOM field reflects actual SAP settings instead of being limited to HR, D, and MIN values. The change affects operation creation, editing, and display throughout the application. For more information, see Add Operations *(on page 76)*.
Align Issue Count Display Across Widgets (iOS) Ensure consistent issue count display between the Issue Reporting popup and Asset 360 Issues Widget by using the same filtering criteria. This eliminates confusion when users verify existing issues for an asset and provides accurate counts in both locations. The alignment includes all open and in-progress issues. For more information, see Home (Dashboard) *(on page 41)*.
Display All Task Tabs in Tasklist (iOS) Show Equipment, Functional Location, and General tabs in the tasklist consistently even when no data is present. This clarifies that tabs are available but empty rather than hidden due to permissions or configuration issues. All three tabs remain visible throughout operation selection and editing. For more information, see Create and Assign Work Orders *(on page 70)*.
Retain Dashboard Filters Across Navigation (iOS)

Table 1-1 New Features and Enhancements in Release 2511 (continued)

Maintain filters applied at dashboard and widget levels when users navigate away and return during the same session. This eliminates the need to reapply filters repeatedly and preserves user preferences throughout their work session. Filter retention works for both dashboard-level and individual widget-level filters. For more information, see Home (Dashboard) *(on page 41)*.
Display All Priority Levels in Dashboard (iOS) Show all available priorities in the dashboard for both Issues and Work Orders instead of limiting the display to values configured in RACE. This provides complete visibility into priority distribution across all work items. The enhancement affects both dashboard widgets and work order list displays. For more information, see Home (Dashboard) *(on page 41)*.
Use Required Start Date for Issue Timeline Filters (iOS) Change the Issues Widget to filter and display issue counts based on Required Start Date instead of Created Date. This provides accurate issue counts when users apply future timeline filters and aligns with how teams plan upcoming work. The parameter change affects all timeline-based filtering in the Issues Widget. For more information, see Home (Dashboard) *(on page 41)*.
Auto-Populate UOM for Manual Components (iOS) Automatically populate the Unit of Measurement field when users manually add components and select a material. This eliminates manual UOM entry for data already defined in the material master and reduces errors. The UOM populates as soon as a material is selected from the dropdown. For more information, see Add Components *(on page 83)*.
Display Sync Status for Issue Items and Tasks (iOS)

Table 1-1 New Features and Enhancements in Release 2511 (continued)

Show sync status in the Outbox when users add Items, Causes, Activities, or Tasks during issue creation. This confirms whether issue-related data has synced successfully to the backend system. The status appears for all four object types in the Outbox. For more information, see Use Application in Offline Mode *(on page 61)*.
Display Sync Status for Component Activities (iOS) Track sync status in the Outbox for all component-related activities including add, update, duplicate, remove, and collect operations. This provides visibility into whether component changes have successfully synced to the backend. The status displays for each type of component activity. For more information, see Use Application in Offline Mode *(on page 61)*.
Display Sync Status for Measuring Point Objects (iOS) Show sync status in the Outbox for measuring point updates and measuring document creation. This helps users confirm that critical measurement data has synced successfully to the backend. The status appears for both measuring point and measuring document activities. For more information, see Use Application in Offline Mode *(on page 61)*.
Enable Passcode Setup After Sign-Out (iOS) Allow users to set up a new passcode after every sign-out or app uninstallation to support shared device environments. This ensures each user can secure their session when multiple workers access the app across different shifts. The passcode setup prompt appears immediately after sign-in. For more information, see Create Passcode *(on page 37)*.
Mixpanel Integration for Login & Sync (iOS & Android)

Table 1-1 New Features and Enhancements in Release 2511 (continued)

Integrate Mixpanel analytics into application to capture detailed insights on user behavior, including click interactions, screen navigation patterns, time spent on each screen, and user attributes such as role and location. This data enables smarter decision-making and helps optimize the overall app experience.
Mixpanel Integration for Issue Creation & Update (iOS & Android) Integrate Mixpanel analytics into the Issue Creation and Update module to capture meaningful insights into how users report and manage issues. Track clicks, screen transitions, time spent on each form, and user-specific attributes to better understand behavior, streamline workflows, and enhance overall usability.
Mixpanel Integration for Work Order Creation & Update (iOS & Android) Integrate Mixpanel analytics into the Work Order Creation and Update module to capture deep insights into user behavior and operational patterns. This enhancement tracks clicks, navigation flows, time spent on each step, and user-specific properties—helping teams understand how work orders are created, updated, and executed in real-world scenarios.

New Features and Enhancements in Release 2510

Table 1-2 New Features and Enhancements in Release 2510

User Status Visibility in Asset 360 List View (iOS & Android) Enhanced transparency and efficiency with the new User Status field in the Asset 360 list view—now displayed just like in the Work Order and Issue list screens. This improvement allows users to instantly view the status of technicians without opening individual records, streamlining decision-making and team coordination. For more information, see View Equipment Details *(on page 105)*.
Geo Tag Configuration for Equipment Module (iOS & Android)

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Gain greater control over location-based tracking with the new Geo Tag configuration setting, available at both tenant and plant levels. This feature allows admins to enable or disable geotagging capabilities in the Equipment module, ensuring flexibility and compliance with organizational or regional policies. For more information, see View Equipment Details *(on page 105)*.
IAS-Based Authentication for Mobile App (iOS & Android) Strengthened enterprise security and streamlined user access with support for (Identity Authentication Service) IAS-based authentication in the mobile app. Users can now log in using their organization's IAS credentials, aligning the mobile login experience with enterprise identity management standards. For more information, see Log in to the iMaintenance Application *(on page 34)*.
Consolidated Outbox Entry for Work Orders (iOS & Android) Simplified your Outbox view with a smarter, more streamlined experience. With this enhancement, when a work order is created but not yet synced (due to offline mode or posting failure), it now appears as a single consolidated record instead of multiple entries for each operation, component, and work order. For more information, see Use Application in Offline Mode *(on page 61)*.
Manual Priority Selection for Issues and Work Orders (iOS & Android) Enhanced flexibility and user control with the new Manual Priority Selection feature in the i-Maintenance mobile app. Users can now directly select the required issue and work order priority value from a drop-down menu, without relying on the Risk Assessment Matrix for automated determination. For more information, see Create a Work Order *(on page 71)*.
Introduced Breakdown Toggle in Issue and Work Order Screens (iOS & Android)

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Enhanced flexibility and data accuracy with the new Breakdown toggle feature, now available in both Issue and Work Order creation and edit screens. Supervisors and Technicians can easily enable or disable the Breakdown option as needed, ensuring accurate tracking of breakdown-related information. For more information, see Create a Work Order *(on page 71)*.
View and Lock Forms in Work Order Update (iOS & Android) Ensure data integrity and prevent accidental loss of information with the new View and Lock Forms enhancement. When updating a work order, the forms in Drafted or Submitted status remain visible in a checked and disabled state—ensuring they cannot be modified or removed. This improvement maintains consistency, preserves important data, and eliminates confusion for technicians and supervisors during work order updates. For more information, see Add Forms *(on page 90)*.
User-Friendly Crash Message with Relaunch Option (iOS & Android) Enhanced user experience and recovery with a new crash handling mechanism that displays a clear, user-friendly message whenever the app unexpectedly closes. Users are now provided with an option to relaunch the app instantly, ensuring minimal disruption and a smoother recovery process.
Auto-Population of Planning Plant & Planner Group (iOS & Android) Reduced manual effort and improved data accuracy with the auto-population of Planning Plant and Planner Group fields during Issue, Work Order, or Operation creation. The system automatically fills these fields based on predefined rules, ensuring consistency and a smoother user experience. For more information, see Create a Work Order *(on page 71)*.
Dashboard Widget Layout & Behavior Updates (iOS & Android)

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Dashboard usability is improved with tabs now grouped under a single “View by” option, simplifying navigation and reducing cognitive load. Widget cards are optimized with a maximum of five per row, while controlled text wrapping and truncation ensure a clean and consistent display across devices. An indicator line above Quick Actions clarifies filter applicability, and widgets with no data are automatically repositioned, helping users focus on meaningful information. These updates collectively enhance readability, efficiency, and overall user experience. For more information, see Home (Dashboard) *(on page 41)*.
Filter Support in List Views from Dashboard (iOS & Android) Streamlined navigation by automatically applying relevant filters when moving from dashboard widgets or cards to list views, ensuring context continuity and reducing repetitive manual filtering. Users can override or add filters on top of system-applied ones, while mismatched filters are gracefully ignored, improving data discoverability and access. This update enables faster retrieval of the exact set of work orders, issues, or operations, enhancing overall user experience and satisfaction. For more information, see Home (Dashboard) *(on page 41)*.
Enhanced Timeline Filters with Custom Date Range Option (iOS & Android) Select a custom date or date range directly from the timeline filters, giving supervisors greater flexibility in viewing and managing workloads. By enabling targeted filtering, users can quickly assess tasks based on priority or status, improving situational awareness and operational planning. It also helps identify urgent or high-risk work orders faster, reducing safety and operational risks. For more information, see Home (Dashboard) *(on page 41)*.
View of Images/Documents Uploaded via Instruction Response Type (iOS & Android) Supervisors can now view images or documents uploaded through the Instruction response type directly within the mobile application. This enhancement improves clarity, provides quick access to supporting media, and reduces reliance on external tools or communications for context.

Table 1-2 New Features and Enhancements in Release 2510 (continued)

For more information, see Add Forms *(on page 90)*.
Enabled Okta Authentication for Mobile (iOS & Android) Introduced Okta Authentication to the mobile application to provide a secure and seamless login experience. This integration enhances user management, enables Single Sign-On (SSO), and aligns with industry-standard security protocols to minimize the risk of unauthorized access.
Search Measuring Points by Description or Number (iOS & Android) Search Measuring Points using either the description or the measuring point number. This feature improves user experience by providing faster access to specific Measuring Points, reducing navigation time and effort. For more information, see View Equipment Details *(on page 105)*.
Auto-Populate Maintenance Plant from Equipment/Functional Location (iOS & Android) The Maintenance Plant field now automatically populates based on the selected Equipment or Functional Location while creating a work order. It reduces manual entry, ensures data accuracy, and streamlines the work order creation process for technicians and supervisors. For more information, see Create a Work Order *(on page 71)*.
Organized View for Work Order and Operation Attachments (iOS & Android) Users can now view Work Order and Operation PRT attachments in separate, clearly defined sections within each operation. This organized view eliminates confusion, helping supervisors quickly locate the exact documents they need without sifting through mixed files. For more information, see Add Operations *(on page 76)*.
Spot New Items Instantly & Auto-Open GOS Attachments (iOS & Android)

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Supervisors can now easily spot newly added operations, components, forms, and attachments, as they are briefly highlighted for better visibility. Additionally, the Work Order GOS section automatically expands whenever images are added, ensuring that critical attachments are immediately accessible. For more information, see Create a Work Order *(on page 71)*.
Consistent UI for Operations, Forms, and Components (iOS & Android) Experience a unified and intuitive interface across the Operations, Forms, and Components sections within a Work Order. This enhancement ensures a consistent layout and visual pattern, helping technicians quickly identify key details and statuses without adjusting to different designs. For more information, see iMaintenance Dashboard and Main Screens *(on page 41)*.
Find Quickly What You Need with Search and Filter (iOS & Android) Supervisors can now instantly find specific Operations, Components, or Forms using powerful search and filter options in the mobile app. This enhancement eliminates the need to scroll through long lists, enabling users to quickly locate the right information and take action efficiently. For more information, see Search and Filter Records *(on page 57)*.
Update Work Orders Quickly Without Extra Navigation (iOS & Android) Supervisors can now edit Operations and Components directly within their respective tabs in a Work Order, without navigating to the main Edit Work Order screen. This streamlined approach reduces clicks, saves time, and keeps workflows uninterrupted while maintaining all validations and business rules. For more information, see Create a Work Order *(on page 71)*.
Attach Forms Instantly from the Forms Tab (iOS & Android)

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Supervisors can now attach forms directly from the Forms tab within a Work Order, without entering edit mode. This streamlines the process, reduces clicks, and saves time, making it easier to manage forms efficiently during work execution. For more information, see Add Forms *(on page 90)*.
Access Work Order and Operations Forms in One Screen (iOS & Android) Users can now access both Work Order and Operations-specific forms directly within the Operations screen, eliminating the need to navigate across multiple screens or modules. This consolidated view simplifies workflows, improves usability, and provides quick access to all relevant forms during fieldwork. For more information, see Add Operations *(on page 76)*.
Navigate Directly from Dashboard Section Headers (iOS & Android) Supervisors can now tap on dashboard section headers (e.g., Overdue Work Orders, Issues) to instantly view a complete, filtered list of items for that section. This enhancement streamlines access to relevant tasks and reduces navigation steps, helping users manage their workload more efficiently. For more information, see Home (Dashboard) *(on page 41)*.
Customizable Date Format Across Mobile Application (iOS & Android) Users can now configure their preferred date format in the mobile application settings, ensuring consistent display of dates across all modules, including Issues, Work Orders, Embedded Forms, and Timesheets. This enhancement accommodates regional preferences, reduces confusion, and improves overall usability.
Expanded File Attachment Support Across Mobile Application (iOS & Android) The mobile application now supports additional file types for attachments, including .doc,- .docx, .xls, and .xlsx, alongside existing formats (.png, .jpeg, .jpg, .mp3, .mp4, .mov, .pdf)- . Users can upload these files consistently across all modules and workflows, enhancing flexibility and compatibility.

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Role-Based Editing of Measuring Points (iOS & Android) Authorized users can now edit existing measuring points in the app based on their roles and permissions. This enhancement ensures data accuracy, operational flexibility, and governance while maintaining secure access controls for sensitive asset information. For more information, see Create a Measuring Point *(on page 109)*.
Quick Access to Operation Details from Dashboard (iOS & Android) The Live Status Overview widget now features separate columns for Operations and Work Orders, with the Operation ID/Description displayed as a clickable hyperlink. Tapping the operation link navigates users directly to the Operation Details screen in Work Order Execution, while pressing back returns them to the dashboard. Column visibility remains configurable in RACE, allowing admins to tailor the widget to business needs. For more information, see Home (Dashboard) *(on page 41)*.
Enhanced Quick Actions Widget with Equipment & Functional Location Cards (iOS & Android) The Quick Actions widget now includes new cards for Equipment and Functional Locations, providing direct navigation to respective modules. Users can quickly access all equipment or functional location lists, improving efficiency and streamlining workflows. For more information, see Home (Dashboard) *(on page 41)*.
Smart Technician Assignment (iOS & Android) Optimize work order and operation assignments with intelligent technician selection in the app. This enhancement ensures that the right technicians are visible for assignment based on configurable tenant-level settings, improving operational efficiency and flexibility. For more information, see Add Operations *(on page 76)*.
Prevent Accidental Deletions in Work Orders (iOS & Android)

Table 1-2 New Features and Enhancements in Release 2510 (continued)

Enhanced control and data integrity in work order management by restricting the deletion of operations and components based on predefined system statuses. This feature prevents accidental or unauthorized deletions, ensuring that only valid actions are performed during specific workflow stages. For more information, see Create a Work Order *(on page 71)*.
AI Response Feedback for Digital Assistant (iOS & Android) Empower users to shape a smarter and more responsive Digital Assistant experience. With the new feedback option, users can now rate AI-generated responses directly within the Work Order execution flow, helping improve the accuracy and relevance of future interactions. For more information, see Create a Work Order *(on page 71)*.

New Features and Enhancements in Release 2507

Table 1-3 New Features and Enhancements in Release 2507

Improved AI Input Flexibility for Issues and Work Orders (iOS & Android) The app now allows users to provide input to the AI model while creating an Issue or Work Order using text only, image(s) only, or both text and image(s). This flexibility ensures users can report issues or create work orders in the most convenient way based on their on-the-ground conditions. For more information, see Create a Work Order *(on page 71)*.
View Default Values for Numeric Responses (iOS & Android) The iMaintenance mobile app now displays default values configured for numeric response fields as soon as the form is opened. This ensures technicians see the intended starting value immediately, without manual input. For more information, see Add Forms *(on page 90)*.
Auto-Populate Operation Number for Single-Operation Work Orders (iOS)

Table 1-3 New Features and Enhancements in Release 2507 (continued)

Supervisors can now view the operation number in the "Component Create" screen when a work order contains only one operation. This removes the need for manual selection, reducing clicks, preventing errors, and improving overall efficiency. For more information, see Add Components *(on page 83)*.
Conditional Logic Support for Multiple Response Types in Embedded Forms (iOS & Android) Enhance Embedded Forms by enabling conditional logic across various response types—such as text, scan, signature, numeric, and selection fields. This feature allows dynamic actions like hiding or showing sections, requesting evidence, raising issues, adding attachments, or triggering follow-up questions based on technician inputs. For more information, see Add Forms *(on page 90)*.
Improved AI Accuracy with EQ/FL Context in Work Order Creation (iOS & Android) Improved the accuracy of AI-generated field suggestions (Title, Description, Priority, etc.) by sending Equipment (EQ) or Functional Location (FL) details when creating a Work Order from their respective modules. By providing asset-specific context, AI delivers more relevant and precise recommendations, enabling faster form completion and reducing manual effort and errors. For more information, see Create a Work Order *(on page 71)*.
View Offline Messages in Chat (iOS & Android) Users can now view and send messages while offline, ensuring uninterrupted communication in low or no connectivity environments. This capability supports remote and industrial locations, such as plants, mines, and offshore rigs, helping maintain operational momentum until connectivity is restored. For more information, see Home (Dashboard) *(on page 41)*.
View Planned Hours and Ongoing Work Orders per Technician (iOS & Android)

Table 1-3 New Features and Enhancements in Release 2507 (continued)

Supervisors can now view planned hours and ongoing work orders for each technician, providing real-time visibility into workloads. This enables more informed task allocation, better shift planning, and early identification of under- or over-utilization. For more information, see Home (Dashboard) *(on page 41)*.
View and Manage SharePoint Attachments (iOS & Android) Users can now view, add, annotate, and manage SharePoint attachments (images, PDFs, documents, etc.) directly within the application. Attachments linked via GOS or DMS to Work Orders, Notifications, Equipment, or Functional Locations are accessible in-app, enabling seamless document access and collaboration for technicians and supervisors. For more information, see Add Forms *(on page 90)*.
Clear Messages for Failed AI Responses (iOS & Android) When you create a Work Order using AI Detect or AI Plan, you can now see clear, user-friendly messages if the AI is unable to generate a response. This helps you understand the situation without being shown technical error details and guides you to the right next step using available call-to-actions. For more information, see Create a Work Order *(on page 71)*.
View References for AI-Detected Priority (iOS & Android) When you create a Work Order using AI, you can now see the reference information the AI used to determine the priority. This helps you understand why a certain priority was assigned, builds trust in AI suggestions, and allows you to explore similar past cases for better decision-making. For more information, see Create a Work Order *(on page 71)*.
Auto-Populated Date and Time for Measuring Documents (iOS & Android)

Table 1-3 New Features and Enhancements in Release 2507 (continued)

When you create or update a Measuring Document, the Date and Time fields are now automatically populated with the current system date and time. This removes the need for manual entry and speeds up the process. The feature is available on the Measuring Document screen accessed from Equipment or Functional Location detail pages. For more information, see Create a Measuring Point *(on page 109)*.
Supports Date and Time Response Type in Mobile Embedded Forms (iOS & Android) Enhanced embedded forms in the mobile application by introducing Date and Time response types. With this feature, technicians can capture accurate temporal data—whether date-only, time-only, or both—directly from their devices. This reduces manual entry errors, improves data reliability, and ensures consistency with web configurations. For more information, see Add Forms *(on page 90)*.
Auto-Populate Works for Non-Reference Key in Embedded Forms (iOS & Android) Supervisors can define which fields should automatically populate when creating a form, along with the flexibility to configure each field's properties, such as editable or read-only. This feature ensures consistency, reduces manual entry, and gives administrators control over how data is captured. For more information, see Add Forms *(on page 90)*.

New Features and Enhancements in Release 2506

Table 1-4 New Features and Enhancements in Release 2506

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

Table 1-4 New Features and Enhancements in Release 2506 (continued)

For more information, see Create a Sub Work Order *(on page 92)*.
View and Manage Work Orders from the Homepage Dashboard (iOS & Android) Supervisors can now view and interact with Work Orders directly on the dashboard using filters like priority, status, type, and timeline. This streamlined view improves situational awareness and helps teams stay focused on the most critical tasks. For more information, see Home (Dashboard) *(on page 41)*.
View Issues at a Glance on the Supervisor Dashboard (iOS & Android) Supervisors can now see all reported issues within their work center directly from the dashboard, along with real-time status and count. This feature enhances visibility, accountability, and response time across maintenance operations. For more information, see Home (Dashboard) *(on page 41)*.
Track Overdue Work Orders on the Supervisor Dashboard (iOS & Android) Supervisors can now view all overdue Work Orders right from the dashboard—along with their priority and count—enabling faster response to delays and better workload control. For more information, see Home (Dashboard) *(on page 41)*.
Visualize Complete Functional Location Hierarchies (iOS, Android) Supervisors can now view the full hierarchy of a Functional Location (FL) directly within the mobile app—including all connected Equipment and Bill of Materials (BOMs). For more information, see View Functional Location Details *(on page 112)*.
View Complete Equipment Hierarchy (iOS) Supervisors can now explore the hierarchy of specific Equipment, including its parent Functional Location and linked BOMs. For more information, see View Equipment Details *(on page 105)*.

Table 1-4 New Features and Enhancements in Release 2506 (continued)

Delete Non-Sync Records from Outbox (iOS & Android) Users can now remove unsynced or failed records directly from the Outbox, ensuring better control over offline data and reducing clutter from outdated or incorrect entries. For more information, see Home (Dashboard) *(on page 41)*.
Share or Print Submitted Forms Seamlessly (iOS & Android) Users can now share submitted digital forms via email or print them straight from the mobile app—supporting faster communication, documentation, and compliance based on tenant-specific configurations. For more information, see Close a Work Order *(on page 97)*.
Scan Materials to Auto-Fill Component Details (iOS & Android) Speed up component entry by scanning barcodes or QR codes to automatically populate Material Number and Description when adding components to Work Orders. This eliminates manual entry errors, enhances accuracy, and improves technician efficiency in the field. For more information, see Add Components *(on page 83)*.
View Complete Functional Location Context in the Mobile App (iOS & Android) Supervisors can now access detailed Functional Location (FL) data on mobile—including DMS documents, BOM, hierarchy, and FL position—right from the app. For more information, see View Functional Location Details *(on page 112)*.
Support for Instruction Response Type in Embedded Forms (iOS & Android) Embedded Forms now support the Instruction response type, allowing you to display read-only guidance within the form itself—no more switching to PDFs or external materials. This improves clarity in complex scenarios, reduces manual input, and boosts technician efficiency in the field. For more information, see Add Forms *(on page 90)*.

Table 1-4 New Features and Enhancements in Release 2506 (continued)

Auto-Assign Forms to Work Orders Based on Configured Criteria (iOS & Android) Forms are now automatically assigned to Work Orders based on Equipment, Functional Location, Task List, Maintenance Plan, or Order Type—using configuration rules set in RACE. For more information, see Add Forms *(on page 90)*.
View Configurable Quick Filters Users can now access quick filters based on RACE configuration—enabling faster navigation and task prioritization. For more information, see Work Orders *(on page 48)*.
Geo-Tagging for Accurate Equipment Suggestions (iOS & Android) Users can now send geographic coordinates along with prompts when creating standalone work orders. This enables the AI engine to recommend the most accurate equipment based on real-time location context. For more information, see Create a Work Order *(on page 71)*.
Sort Work Orders and Operations by Planned Start Date for Accurate Scheduling (iOS & Android) Work Orders and Operations are now displayed based on their Planned Start Date rather than creation date. For example, a Work Order created today but scheduled to start tomorrow will now appear under tomorrow's bucket—aligning with real-world scheduling and improving day-wise planning accuracy. For more information, see Work Orders *(on page 48)*.

New Features and Enhancements in Release 2505

Table 1-5 New Features and Enhancements in Release 2505

Streamline Issue Lifecycle with User Status Control (iOS & Android)

Table 1-5 New Features and Enhancements in Release 2505 (continued)

Supervisors can now view and update the User Status of issues from within the mobile app. Whether your statuses are sequential (e.g., "Open → In Progress → Closed") or non-sequential (e.g., "Awaiting Parts" used at any stage), this enhancement helps maintain lifecycle control aligned with business rules. For more information, see Review Raised Equipment Issues *(on page 64)*.
Control Work Order Progress with User Status Selection and Validation (iOS, Android) Work Orders can now be updated with new User Statuses—directly from the app—while respecting SAP's validation rules. For example, if a technician tries to move a Work Order from "Created" to "Completed" without going through the "In Progress" status, the app will prevent this unless allowed by SAP logic. For more information, see Create a Work Order *(on page 71)*.
Track Real-Time Work Orders and Operation Logs (iOS & Android) All activities related to a Work Order or its Operations—like assignments, updates, or status changes—are now captured in a real-time log visible within the mobile session. For more information, see Home (Dashboard) *(on page 41)*.
Select Equipment & Functional Location Instantly During Work Order Creation (iOS & Android) Tapping on the Equipment (EQ) or Functional Location (FL) field now brings up a searchable dropdown list, making it faster and easier to select the correct asset while creating a work order. For more information, see Create a Work Order *(on page 71)*.
Approve or Reject Submitted Timesheets in the Timesheet Module (iOS & Android) Supervisors can now approve or reject technician-submitted timesheets directly within the mobile app.

Table 1-5 New Features and Enhancements in Release 2505 (continued)

For more information, see Approve or Reject Timesheets *(on page 98)*.
Contextual Chat for Real-Time Collaboration (iOS & Android) Supervisors can now chat with each other directly within a Work Order—keeping all conversations tied to the job context. For more information, see Home (Dashboard) *(on page 41)*.
On-Demand SAP Sync with Manual Sync Button (iOS & Android) Users can now manually trigger a sync with SAP from the mobile app home screen using the new Manual Sync button. For more information, see Home (Dashboard) *(on page 41)*.
View and Manage SharePoint Attachments Within iMaintenance (iOS & Android) Supervisors can now view, add, annotate, and manage SharePoint attachments—such as PDFs, images, and documents—directly within the mobile app. For more information, see Create a Work Order *(on page 71)*.

New Features and Enhancements in Release 2504 (Beta)

Table 1-6 New Features and Enhancements in Release 2504 (Beta)

Track Work Execution in Real Time with the Supervisor Dashboard (iOS, Android) The new Supervisor Dashboard gives you a unified, real-time view of work order distribution, technician activity, pending approvals, and issue status—all filtered to your work center. It's your operational control panel to monitor progress, identify delays, and take timely action without switching screens. For more information, see Home (Dashboard) *(on page 41)*.
Instantly Create a New Work Order by Duplicating an Existing One (iOS, Android)

Table 1-6 New Features and Enhancements in Release 2504 (Beta) (continued)

Creating similar work orders just got faster. With the new Duplicate option, you can create a new work order by copying all relevant details from an existing one—whether it originated from SAP or was created in the mobile app. For more information, see Create a Work Order from Existing One *(on page 95)*.
Auto-Assign Components When Adding Operations from Task Lists (iOS, Android) Work Order creation is now faster and more accurate. When you add operations from a task list, any associated components are automatically added—eliminating manual entry and ensuring accurate material planning. For more information, see Add Components *(on page 83)*.
Close Issues Without a Work Order—Now Directly from the App (iOS, Android) Not every issue needs a work order. With this new capability, users can now mark issues as Completed directly from the mobile app—even for SAP-synced issues—without converting them into work orders. This adds flexibility for quickly resolving low-impact issues, while maintaining traceability and ERP alignment. Users can complete any issue in Released or In Progress status by adding a mandatory comment and, optionally, attaching media. Completion works both online and offline, with updates syncing to SAP automatically when reconnected. For more information, see Release and Convert Issues into Work Orders *(on page 64)*.

1.4. System Requirements

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

System	Minimum Requirements
Compatible Form Factors	**iOS** - Tablets and Phones **Android** - Tablets and Phones

System	Minimum Requirements
Compatible Device(s)	**iOS** Supported Versions: Latest iOS version (iOS 26) and two previous major versions. Example (as of iOS 26 being current): iOS 20, iOS 18 **Android** Supported Versions: Latest Android version (Android 15) and two previous major versions. Example (as of Android 15 being current): Android 15, Android 14
Compatible Browser(s)	**iOS (Safari)** Supported Versions: Latest version (iOS 26) and four previous versions of Safari. **Note:** Based on the Safari version available with the corresponding iOS versions listed above. **Windows 11** Supported on the latest and two previous major versions of the following browsers: • **Google Chrome** - Example (as of Chrome version 135): Chrome 134, 132, 133 • **Microsoft Edge** - Example (as of Edge version 135): Edge 135, 134, 133
Device Storage and Memory Requirement	All devices must have a minimum of **64GB** of storage and **8GB** of RAM to support online data processing effectively.

System	Minimum Requirements
	A configuration of 64GB storage and 8GB RAM is recommended to ensure optimal performance, particularly when handling higher volumes of data, including document processing and offline storage capabilities. Actual performance may vary depending on the total volume of data being managed and the amount of available memory on the device.

Note:

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

2. Get Started with the Application

Get started with the application by logging in, exploring the dashboard and main screens, and learning the buttons and icons to navigate efficiently.

This chapter has the following topics:

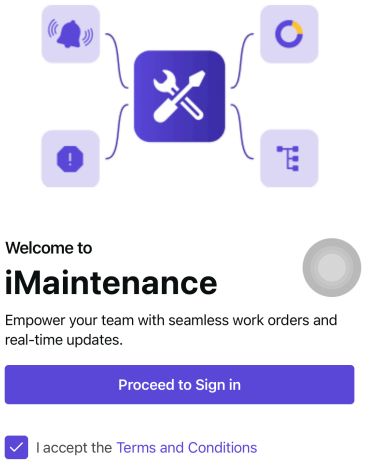
2.1. Log in to the iMaintenance Application

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

To log in to the application:

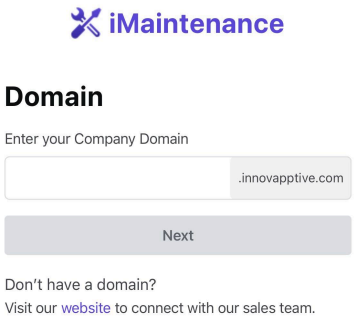
1. Open the application.
2. In the Welcome screen, accept **Terms and Conditions** and tap **Proceed to Sign in**.

Figure 2-1 Welcome Screen



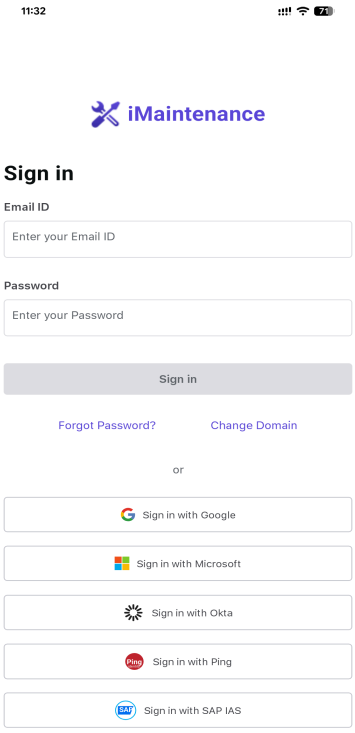
3. In the **Domain** screen, enter the company domain and tap **Next**.

Figure 2-2 Domain Screen



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

Figure 2-3 Sign In Screen



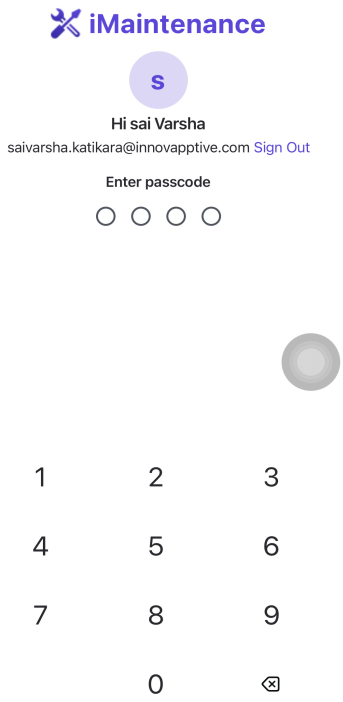
2.1.1. Create Passcode

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

To create a passcode:

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

Figure 2-4 Create Passcode Screen



Note:

- The passcode is device-specific. If you use a new device, you must create a passcode for that device again.
- If you share the device with other users across shifts, set a new passcode after each sign-out to keep your session secure. You must also set a new passcode whenever you reinstall the application.
- If you forget the passcode, you must reinstall the application and create the passcode again.

2.1.2. Enable Biometric Access

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

To enable biometric access:

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

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

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

Figure 2-5 Offline Sync

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

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

2.2. iMaintenance Dashboard and Main Screens

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

The application consists the following screens:

2.2.1. Home (Dashboard)

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

Supervisor Dashboard

The **Supervisor Dashboard** is the central hub for real-time monitoring and management of maintenance operations. It provides a consolidated view of:

- Work order distribution
- Technician workloads
- Pending approvals

This gives supervisors the ability to:

- View task allocation at a glance
- Track technician progress
- Quickly spot and address operational bottlenecks

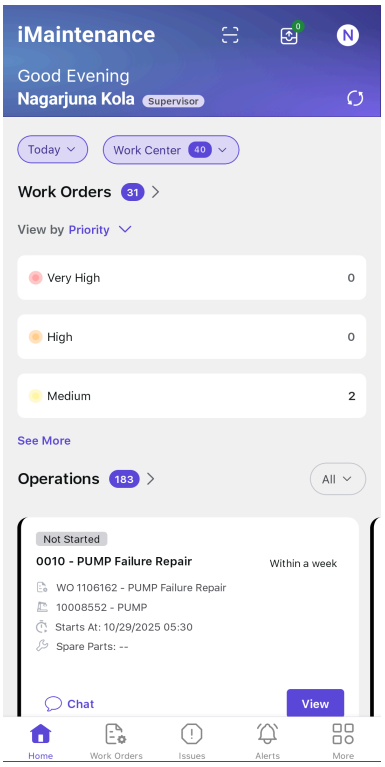
The dashboard integrates real-time alerts from multiple systems supporting **early detection of critical events** such as pressure or temperature anomalies.

For example: *If Reactor-7 exceeds 80 psi, an instant alert is displayed—prompting immediate corrective action.*

This reduces response times, prevents unplanned downtime, and improves equipment uptime and MTTR (Mean Time to Repair).

The Supervisor Dashboard is divided into the following key sections:

Figure 2-6 Supervisor Dashboard



***Productivity Hack*:** Tap any dashboard section header (e.g., **Work Orders**, **Overdue Work Orders**, or **Issues**) to view a complete or filtered list of items for that section.

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

    icon lets you scan the asset from the Dashboard.
  - The Outbox

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

- The Profile

icon lets you view the personal profile details.

- The Manual Sync

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

- You can apply filters to view data for:
  - Today (Default)
  - Tomorrow
  - This Week
  - Custom (specific date or date range)

- **Work Orders**
  - Select a category from the **View by** drop-down to view interactive widgets that help you quickly identify and prioritize pending tasks:
    - **Priority**: Displays work orders grouped by priority levels — **Very High**, **High**, **Medium**, and **Low**.
    - **Status**: Displays work orders grouped by their current status — **Created**, **Released**, **In Progress**, **Completed**, and **Closed**.
    - **Type**: Displays work orders grouped by their type — **Preventive WO**, **Corrective WO**, **Breakdown WO**, and **Emergency WO**.
  - Tap any category to open a filtered list of the corresponding work orders.
- **Overdue Work Orders**
  - This section displays three interactive widgets **Priority**, **Status**, and **Type** that are categorized into different groups along with the count.
- **Issues**
  - This section displays following three interactive widgets:
    - **Priority**: Displays issue grouped by priority levels — **Very High**, **High**, **Medium**, and **Low**.
    - **Status**: Displays issues grouped by their current status — **Open**, **Released**, **In Progress**, **Completed**, and **Rejected**.
    - **Type**: Displays issues grouped by their type — **Corrective** and **Breakdown**.
  - Tap any category to open a filtered list of the corresponding issues.

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

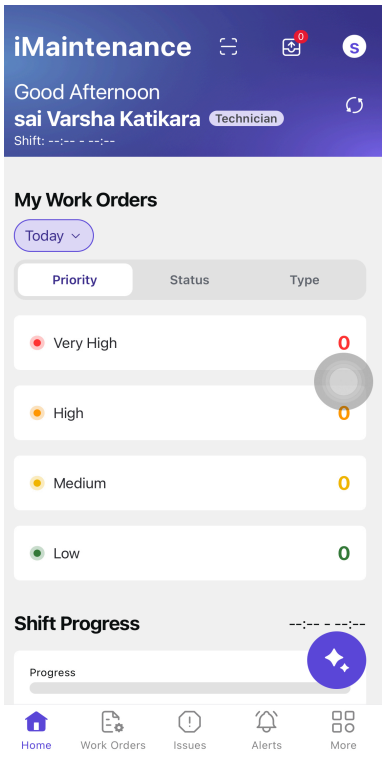
    - Displays issue counts categorized as:
        - **Open**
        - **Released**
        - **In Progress**
        - **Completed**
        - **Rejected**
    - Tap any category to view the corresponding filtered issue list.
- **Quick Actions**
    - Provides shortcuts for the following frequently used actions:
        - **Report an Issue**
        - **Create Work Order**
        - **View Equipment List**
        - **View Functional Locations List**

Technician Dashboard

After logging in, you'll see the Home screen—your main dashboard for managing workload, tracking progress, and accessing key actions throughout your shift.

The Technician Dashboard is divided into the following key sections:

Figure 2-7 Technician Dashboard



Productivity Hack: Tap section headers (e.g., Work Orders, Issues) to view filtered lists instantly.

- **Header**
  - Displays the greeting, name, current date, time, and shift details (e.g., 07:00 AM – 03:00 PM).
  - The Scan  icon lets you scan the asset from the Dashboard.
  - The Outbox 

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

icon lets you view the personal profile details.
  - The Manual Sync  icon lets you manually synchronize your device with the SAP backend. Use this whenever you want to ensure your app is fully up to date.
  - You can apply filters to view data for:
    - Today (Default)
    - Tomorrow
    - This Week
    - Custom (specific date or date range)
- **My Work Orders**
  - Select a category from the **View by** drop-down to display interactive widgets that help you quickly identify and prioritize pending tasks:
    - **Priority**: Displays work orders grouped by priority levels — **Very High**, **High**, **Medium**, and **Low**.
    - **Status**: Displays work orders grouped by their current status — **Created**, **Released**, **In Progress**, **Completed**, and **Closed**.
    - **Type**: Displays work orders grouped by their type — **Preventive WO**, **Corrective WO**, **Breakdown WO**, and **Emergency WO**.
  - Tap any category to open a filtered list of the corresponding work orders.

- **Issues**
  - This section displays the following three interactive widgets:
    - **Priority**: Displays issue grouped by priority levels — **Very High**, **High**, **Medium**, and **Low**.
    - **Status**: Displays issues grouped by their current status — **Open**, **Released**, **In Progress**, **Completed**, and **Rejected**.
    - **Type**: Displays issues grouped by their type — **Corrective** and **Breakdown**.
  - Tap any category to open a filtered list of the corresponding issues.
- **Shift Progress**
  - Shows a visual progress bar indicating the percentage of operations completed for the selected time period (based on the applied filter).
- **Live Status Overview**
  - Shows a real-time technician activity with the following columns:
    - **Planned Utilization**: The total planned work for the shift across all technicians.
    - **Shift Progress**: The total completed planned work for the shift.
    - **Technician Name**: The technician name with planned hours.
    - **Shift Progress**: Today's operations progress (completed/total).
    - **Operation**: The operation or job the technician is currently working on, with a clickable link to open the full work order details.
    - **Operation Status**: The status of the operation (In Progress, On Hold, etc.).
    - **Work Order**: The work order the technician is currently working on
    - **Actions**: Tap the Chat icon to start a conversation with the technician.
    - **Show All**: Tap to view the real-time status of all technicians.
- **My Operations**
  - Lists high-priority operations assigned to you, showing:
    - Priority levels
    - Permit and spare part readiness
    - AI-based assistance
  - Tap **AI-Assistance** to launch SIA (Smart In-App Assistant) and view step summaries.
  - Tap **Start** to begin the task and trigger the auto-timer (if permits and parts are already collected).

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

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

> **Note:**
> This section is shown only when PM tasks are assigned.

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

> **Note:**
> Header filters (Today, Tomorrow, This Week) do not apply here.

- **Quick Actions**
  - Provides shortcuts for the following frequently used actions:
    - **Report an Issue**
    - **Create a Work Order**
    - **View Equipment List**
    - **View Functional Locations List**
    - **Fill Timesheets**

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

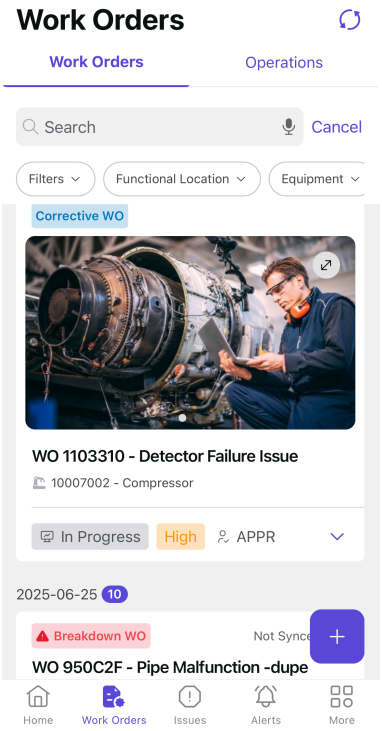
2.2.2. Work Orders

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

Work Orders

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

Figure 2-8 Work Orders Screen



On this screen, you can:

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

Operations

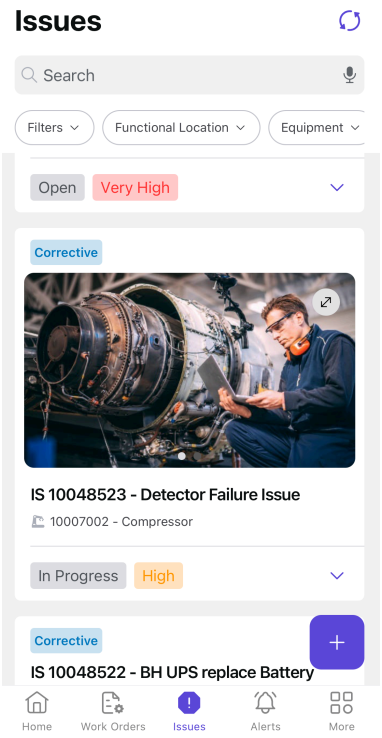
The Operations tab lists the assigned operations, providing a clear breakdown of individual tasks within a work order.

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

2.2.3. Issues

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

Figure 2-9 Issues Screen



On this screen, you can:

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

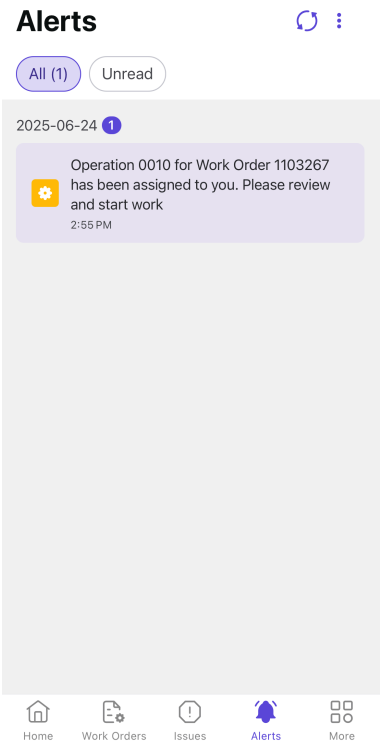
With these features, the Issues screen ensures that all reported concerns are properly documented and addressed, improving overall maintenance efficiency.

2.2.4. Alerts

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

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

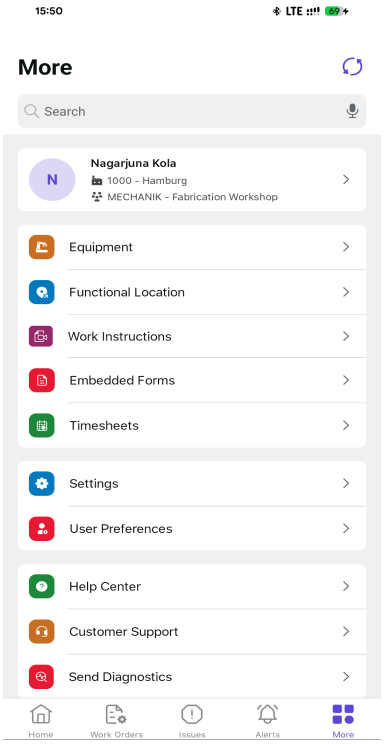
Figure 2-10 Alerts Screen



2.2.5. More

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

Figure 2-11 More Screen



On this screen, you can:

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

2.3. Buttons and Icons in Application

This section explains the buttons and icons in the application, helping you understand their functions for smooth and efficient navigation.

Following are the buttons and icons available in the application:

Table 2-1 Buttons and Icons

Button/Icon	Name	Purpose
N	Profile	View User Profile.

Table 2-1 Buttons and Icons (continued)

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

Table 2-1 Buttons and Icons (continued)

Button/Icon	Name	Purpose
	Measuring Point	View measuring point details of the work order.
	Hierarchy	View the equipment or functional location hierarchy.
	Search	Search for records in the modules.
	Chat	Send messages, share files, and tag team members.

3. View Push Notifications

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

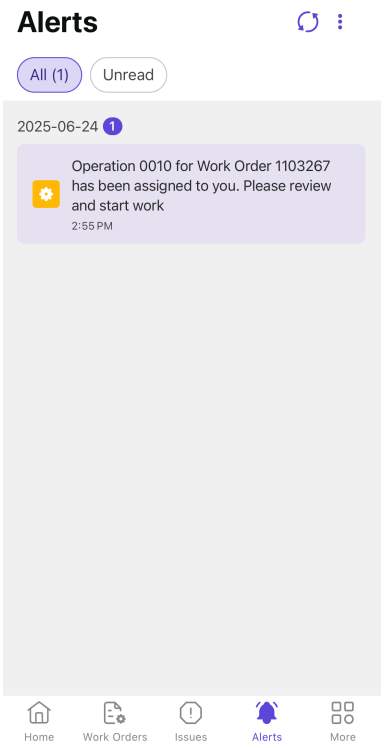
For example, if a pump's vibration crosses the 10 mm/s safety threshold at 11 p.m., the your device gets an instant alert. You can act on it right away—either slow down the machine or schedule a repair before failure occurs. This quick response prevents breakdowns, reduces repair time, and helps lower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

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

To check notifications:

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

Figure 3-1 Alerts Screen



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

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

4. Search and Filter Records

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

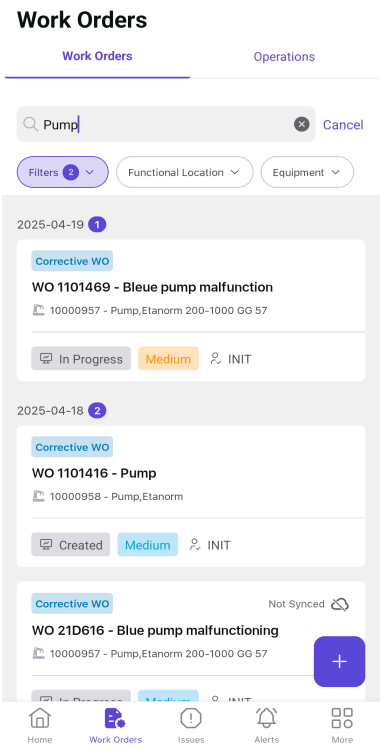
Search Records

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

To search records:

1. Navigate to the **Work Orders**, **Operations**, or **Issues** screen.
2. Enter the keyword in the Search bar.

Figure 4-1 Search Records



The search results are displayed.

Filter Records

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

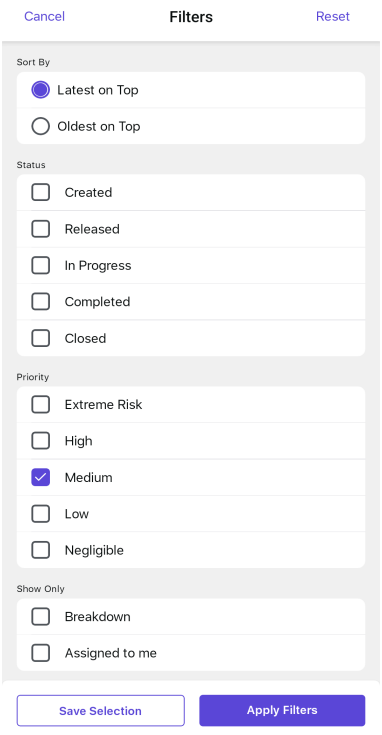
To filter records:

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

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

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

Figure 4-2 Filter Records



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

5. Access Work Orders and Issues Quickly with Smart Sync

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

To set your data sync preferences:

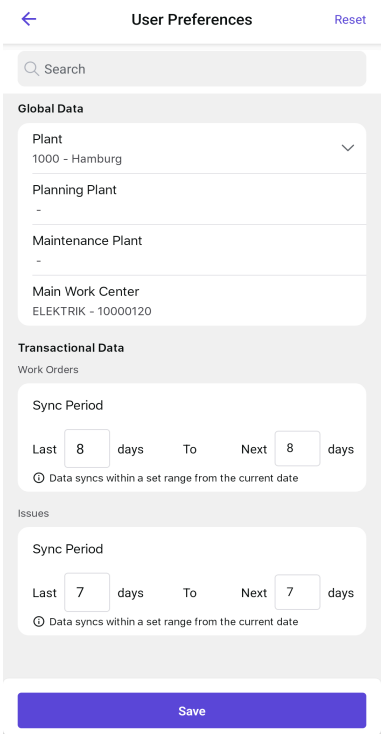
1. Navigate to the **More** screen and select **User Preferences**.
2. To select the **Plant**,
    - Under **Global Data**, choose your **Planning Plant** and **Maintenance Plant** from the available options.
    - View key details, including your **Main Work Center**.
3. To define **Data Sync Period**,

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

> **Note:**
> Data syncs only within the specified range from the current date, ensuring faster updates.

4. Tap **Save**.

Figure 5-1 User Preferences



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

5.1. Use Application in Offline Mode

This section covers how to use the application in offline mode, allowing you to access features and complete tasks without an active internet connection.

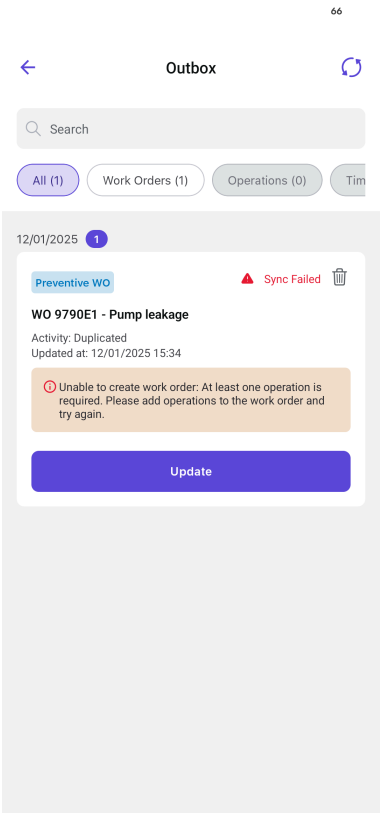
The application is designed to work seamlessly even when your device is not connected to the internet.

- The app automatically switches to offline mode when network connectivity is lost.
- You can continue using all core features—including viewing work orders, entering data, and capturing issues—just like in online mode.
- Any data entered in offline mode is stored locally on your device (Outbox).

> **Note:**
>
> The Outbox shows one record per work order, even if the work order contains multiple records. For example, when you create a work order in offline mode, it appears as a single consolidated record rather than separate entries for operations and components.
>
> During synchronization, the Outbox shows what is currently being synced. For example, issues, items, causes, tasks, or measuring points. This lets you track the sync progress in real time.

- Once your device reconnects to the internet, the app automatically syncs the offline data to the SAP server.

Figure 5-2 Outbox



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

Note:
The AI Assistant is unavailable in offline mode.

Sync Data Before Entering Low-Connectivity Areas

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

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

This ensures that:

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

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

How the Sync Works:

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

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

6. Review Raised Equipment Issues

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

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

Based on your review, you can:

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

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

6.1. Release and Convert Issues into Work Orders

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

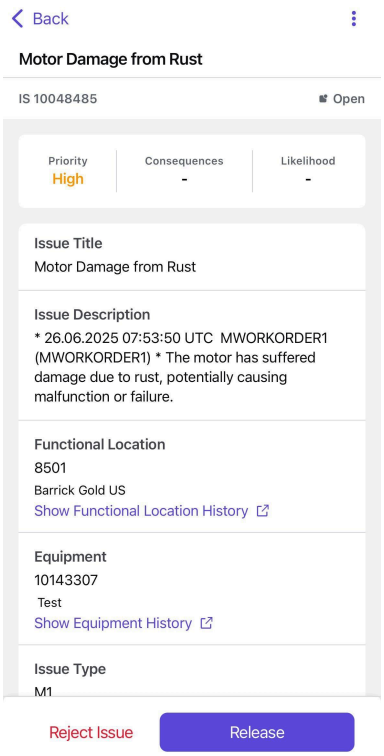
To release and convert issues into work order:

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

> **Note:**
> You can tap the More 

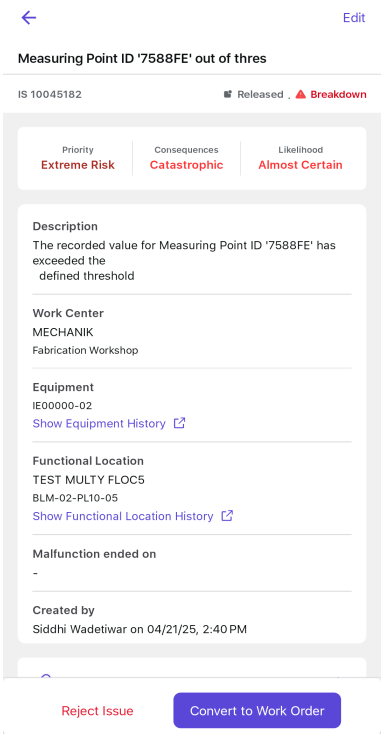
icon and select **Mark as Complete** and add comments and attachments to complete the issue.

Figure 6-1 Release Issue



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

Figure 6-2 Convert to Work Order

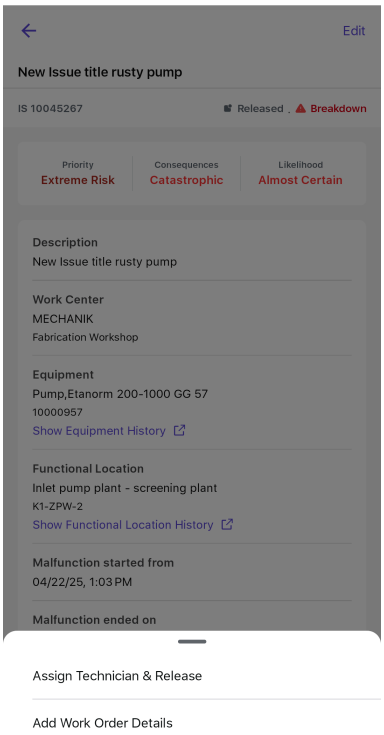


Assign Technician & Release Work Order

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

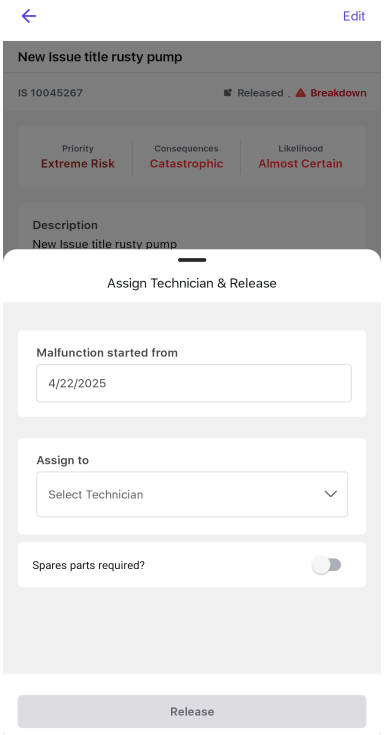
1. Select **Assign Technician & Release**.

Figure 6-3 Assign Technician and Release



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

Figure 6-4 Fill Details and Release



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

Add Work Order Details

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

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

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

2. Update work order details as required. For information, see Create a Work Order *(on page 71)*.

6.2. Reject Non-Impactful Issues

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

To reject an issue:

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

7. Create and Assign Work Orders

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

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

Understand a Work Order

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

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

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

Create Work Orders Using AI Plan

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

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

You can:

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

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

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

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

Why Work Orders Matter

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

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

Sample Work Order Breakdown

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

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

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

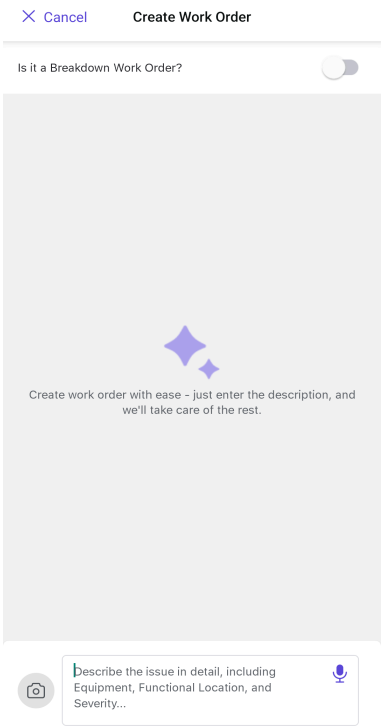
7.1. Create a Work Order

This section guides you through creating a work order, detailing the steps to add operations, components, permits, forms, and assign resources, and capture relevant information efficiently.

To create a work order:

1. Navigate to the **Work Orders** screen.
2. Tap the Create icon at the bottom-right of the screen.
3. In the **Create Work Order** screen, you can describe the issue using one of the following methods:
    - **Use the Camera**: Tap the Camera icon to capture or upload a photo of the issue. The system uses the image to identify the problem and suggest relevant fields.
    - **Type a Prompt**: Enter key details like equipment, functional location, and severity in the text box.
    - **Use Voice Input**: Tap the Mic icon and speak your description. The system records and analyzes your input to auto-fill details using AI.

    Figure 7-1 Create Work Order



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

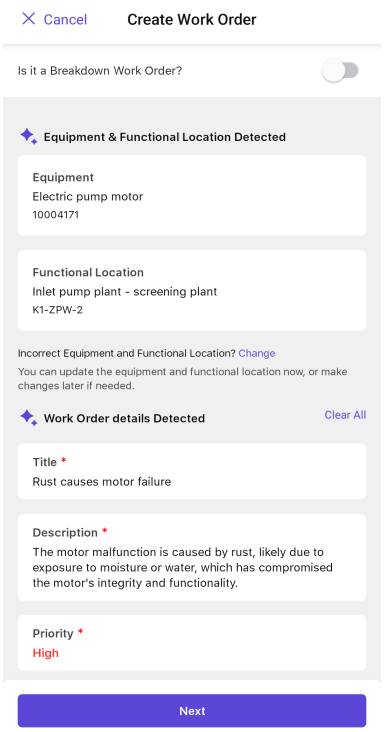
4. Tap the Enter icon.

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

Tip: *Review and adjust the AI-suggested details before saving the Work Order.*

Note:
Rate AI-generated responses using the Like or Dislike buttons to help improve suggestions.

Figure 7-2 AI Generated Work Order Details



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

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

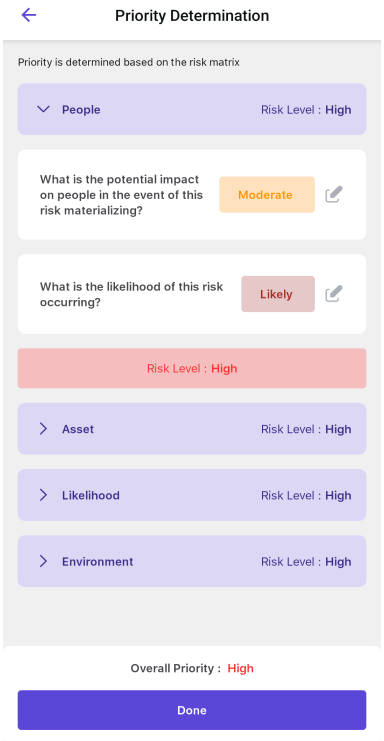
- **Title:** Title or a brief description of the work order.
- **Description:** A detailed explanation of the work order.
- **User Status**: Tap to change the status of the work order. For example, INIT, APPR, RJEC, CLSD, and so on.
- **Work Order Type**: Select the required type from drop-down. For example, Corrective WO, Preventive WO, and so on.
- **Maintenance Activity Type**: Populates automatically based on the selected Work Order Type.
- **Maintenance Plant**: Populates automatically based on the selected Equipment or Functional Location.
- **Planning Plant & Planning Group**: Populate automatically based on the rules.
- **Priority:** The urgency of the work order.

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

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

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

Figure 7-3 Update Priority



6. In the **Priority Determination** (risk assessment) screen, assess the risk level by selecting the likely impact in each category:
    a. **People**: Impact of the issue on worker safety.
    b. **Assets**: Potential damage to equipment.
    c. **Likelihood**: How likely the issue is to occur.
    d. **Environmental**: Impact on surroundings or compliance.
    e. Based on your selections, the AI automatically calculates the **Overall Priority** as **Low**, **Medium**, or **High Risk**.
    f. Tap **Done**.

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

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

This automated risk ranking:

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

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

Note:

- You can also manually select the Priority value from the drop-down, instead of relying on the Risk Assessment Matrix for automated determination.
- You can use the **chat** feature within the Work Order details screen to send messages, share files, and tag team members in real time. It supports **notifications** and **automatic updates**, making collaboration and tracking more efficient.

7.1.1. Add Operations

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

Operations help with the following:

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

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

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

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

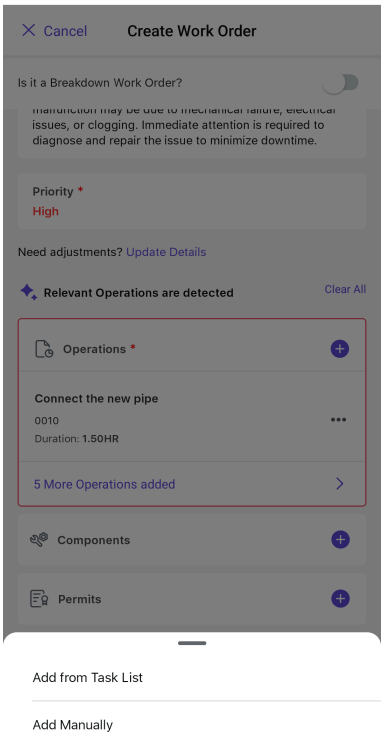
Not all operations within a work order require a technician to be assigned individually. Even if no technician is assigned at the **operation level**, the person assigned to the **overall work order** can still review and confirm those operations.

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

To add operations to the work order:

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

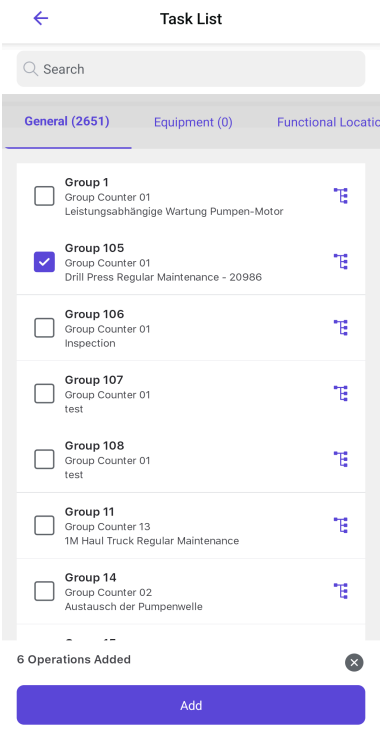
Figure 7-4 Add Operations



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

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

Figure 7-5 Add Operations From Task List

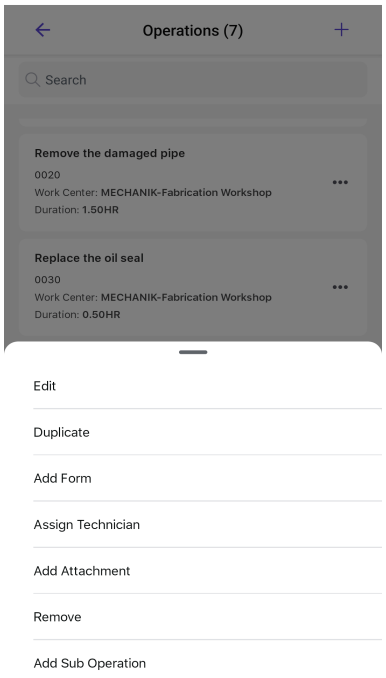


b. Tap the **Add** button.

c. In the **Operations** screen, you can view the list of operations.

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

Figure 7-6 More Options

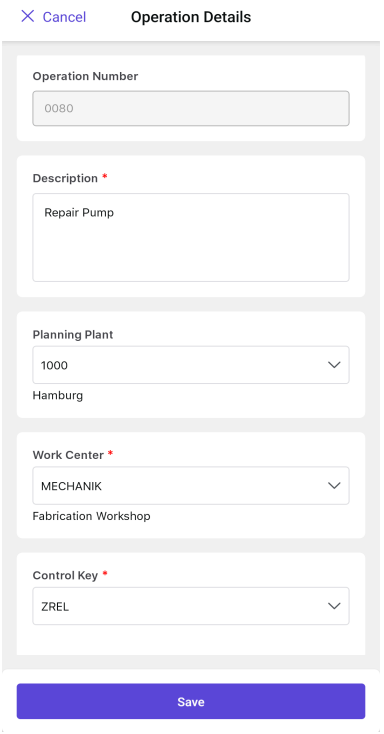


e. In the **Operation Details** screen, you can modify the following details:

- Description
- Planning Plant
- Work Center
- Control Key (Automatically populates based on Work Order type and Planning Plant)
- Plant
- Activity Type (Automatically populates based on Work Center)
- Number of Resources

- Duration
- Unit of Work
- Equipment
- Functional Location

Figure 7-7 Edit Operation Details



f. Tap **Save**.

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

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

- **Duplicate** to duplicate the operation.
- **Add Form** to add forms from the list.
- **Assign Technician** to assign the technician based on the work center or plant.
- **Add Attachment** to add images, videos, and documents. You can also view Work Order and Operation level attachments in those sections.
- **Remove** to delete the operation.
- **Add Sub Operation** to add a sub-operation.

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

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

7.1.2. Add Sub-Operations

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

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

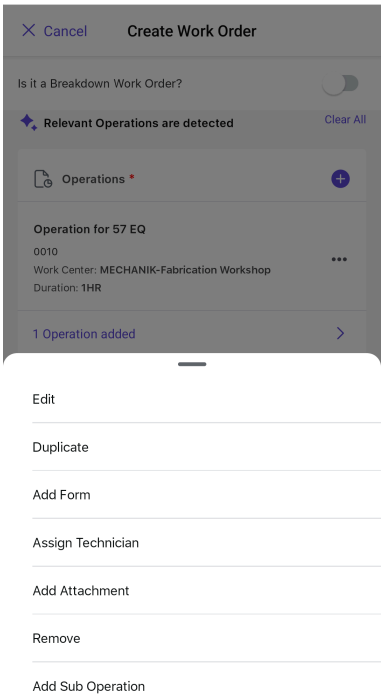
1. **Operation: Dismantle the Compressor**
    - **Sub-Operation 1**: Remove external covers and panels.
    - **Sub-Operation 2**: Disconnect electrical connections.
    - **Sub-Operation 3**: Detach motor and compressor unit.
2. **Operation: Inspect and Service Components**
    - **Sub-Operation 1**: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

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

To add sub-operations:

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

   Figure 7-8 Add Sub Operation



2. In the **Operation Details** screen, fill in the details and tap **Save**. For more information, see Add Operations *(on page 76)*.

7.1.3. Add Components

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

Adding **Components** in a Work Order:

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

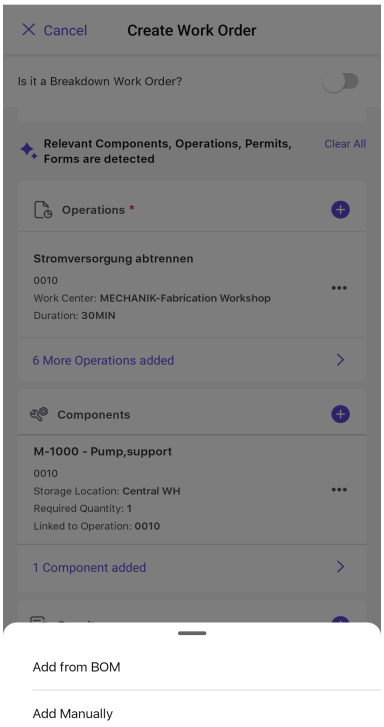
By adding components in advance, maintenance tasks become more efficient, reducing the risk of missing parts and unplanned delays.

To add components to the work order:

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

   A pop-up is displayed with the following options:
   - **Add from BOM (Bill of Materials)**
   - **Add Manually**

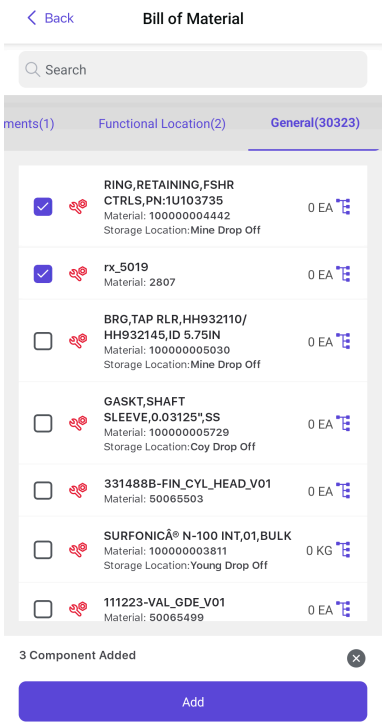
   Figure 7-9 Add Components



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

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

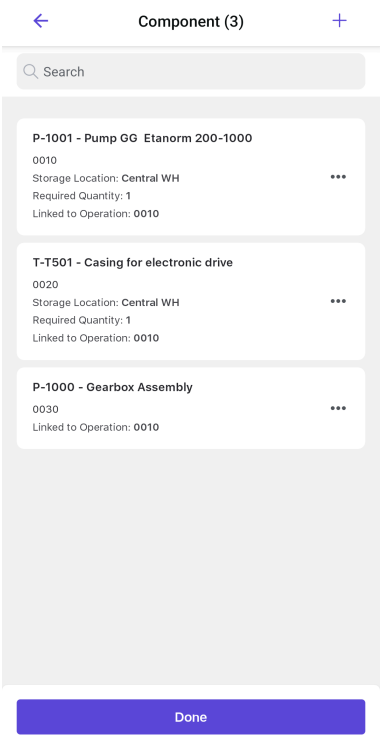
Figure 7-10 Select Components from BOM



b. Tap the **Add** button.

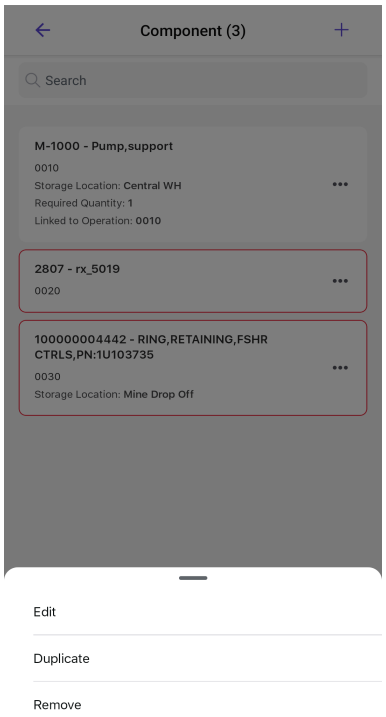
c. In the **Components** screen, you can view the list of components.

Figure 7-11 Components Screen



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

Figure 7-12 More Options



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

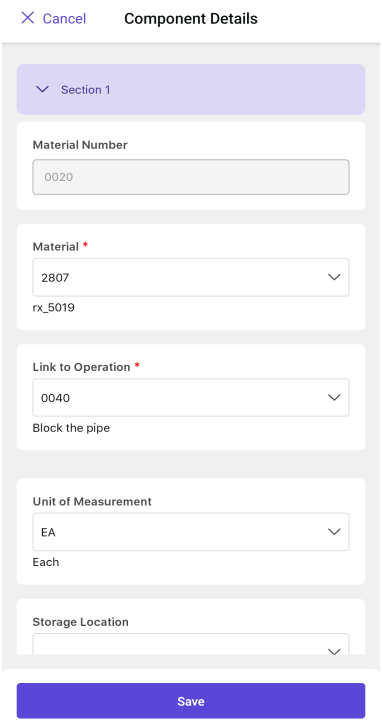
- Required Quantity
- Material

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

- Unit of Measurement (Automatically populates based on selected Material)
- Category
- Operation Number

> **Note:**
> The Operation Number gets displayed automatically if the work order contains only one operation.

Figure 7-13 Edit Component Details



f. Tap **Save**.

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

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

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

3. If you select **Add Manually**, do the following:
   a. In the **Component Details** screen, fill in the details and tap **Save**.

7.1.4. Add Permits

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

Adding **Permits** in a Work Order:

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

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

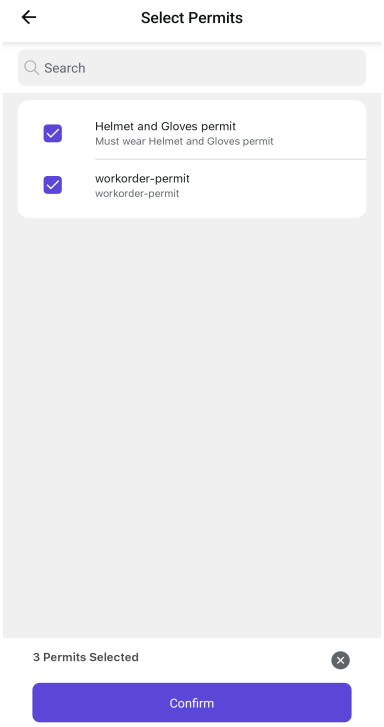
1. **Hazard Identification:** High-pressure system, electrical risks, and moving parts.
2. **Safety Requirements:**
    - **Isolation Procedures:** Shut down and disconnect power sources.
    - **Lockout/Tagout (LOTO):** Prevent accidental reactivation.
    - **Personal Protective Equipment (PPE):**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

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

To add permits to the work order:

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

Figure 7-14 Add Permits



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

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

7.1.5. Add Forms

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

Forms help with the following:

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

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

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

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

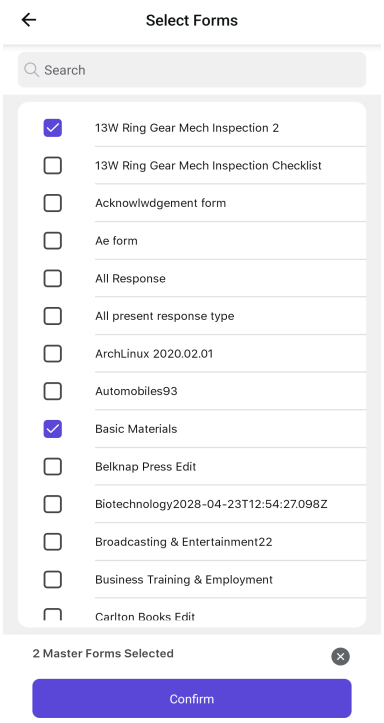
Note:
Forms are automatically assigned to Work Orders based on Equipment, Functional Location, Task List, Maintenance Plan, or Order Type.

To add forms to the work order:

1. In the **Forms** tab, tap the Add icon on the right side.
2. In the **Select Forms** screen, select the relevant form and tap **Confirm**.
3. **Add attachments to the form** by tapping the attachment option within the form. These attachments are automatically included in the PDF when the form is submitted.

Note:
- Attachments added to forms are linked to the form itself and are not stored separately under the Work Order GOS/DMS.
- When updating a work order, the forms in Drafted or Submitted status remain visible in a checked and disabled state. This ensures that they cannot be modified or removed

Figure 7-15 Add Forms



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

- **Duplicate** to duplicate the form.
- **Remove** to delete the form from the work order.

7.2. Create a Sub Work Order

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

To create a sub-workorder:

1. Open the work order.
2. Tap the More  icon on top-right and select **Create Sub-Work Order**.
3. In the Create Sub-Work Order screen, enter the issue details. For more information, see Create a Work Order *(on page 71)*.

4. Tap **Next**.
5. Tap **Review**.
6. Review the details and tap **Create**.

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

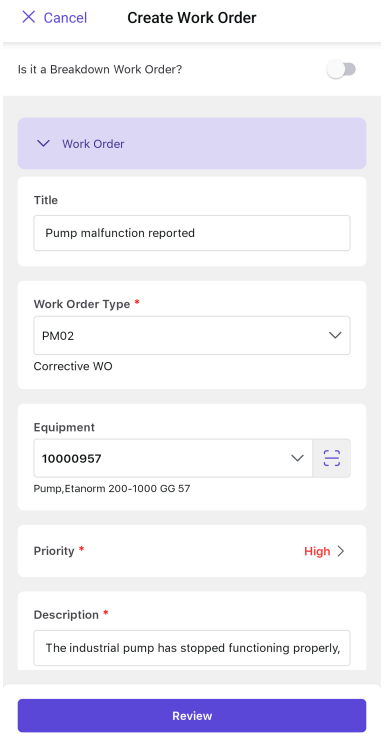
7.3. Review and Release the Work Order

This section explains how to review and release a work order, ensuring all details are verified and the task is ready for execution.

To review and release the work order.

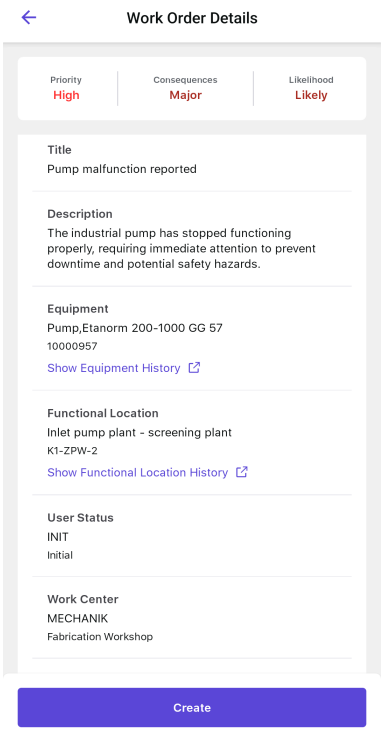
1. Tap **Review** to review the details.

Figure 7-16 Review Work Order



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

Figure 7-17 Finalize Work Order



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

Note:

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

7.4. Create a Work Order from Existing One

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

This feature helps you:

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

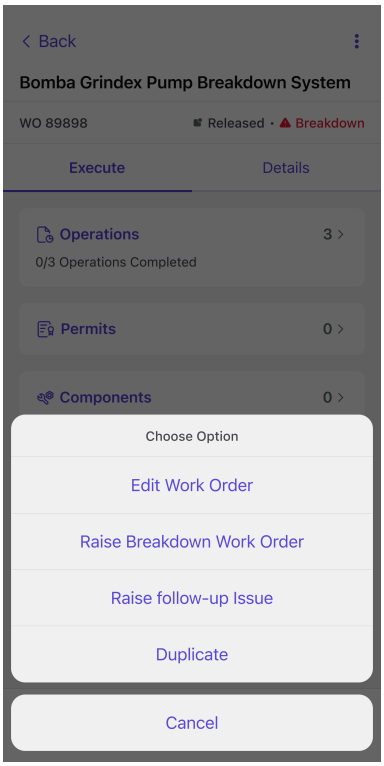
To copy a work order from an existing one:

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

   icon on top-right.
3. In the **Choose Option** window, select **Follow on Work Order**.

Figure 7-18 Duplicate or Copy Work Order



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

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

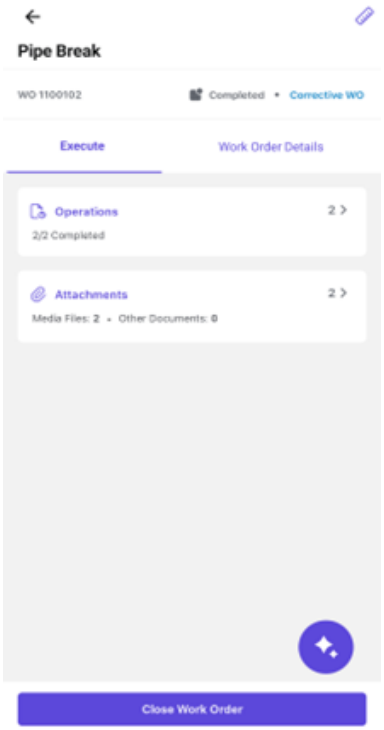
8. Close a Work Order

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

To close a work order:

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

Figure 8-1 Close Work Order



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

9. Approve or Reject Timesheets

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

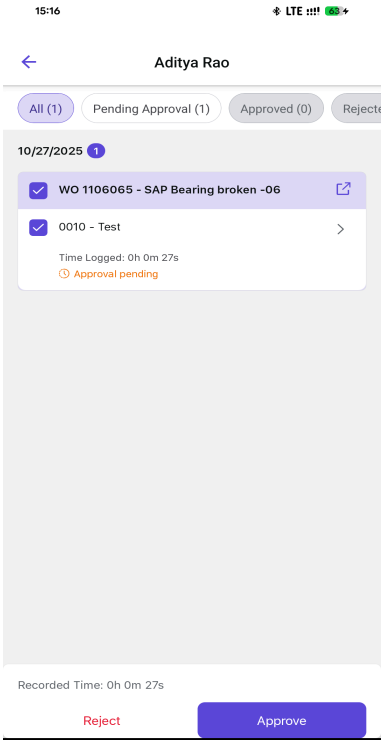
Timesheets help with the following:

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

To approve or reject timesheet:

1. Navigate to the **More** screen.
2. Select the **Timesheets** module.
3. In the **Timesheets** screen, select the technician from the list.
4. Choose the timesheet or work log you want to review.

Figure 9-1 Timesheet Approval

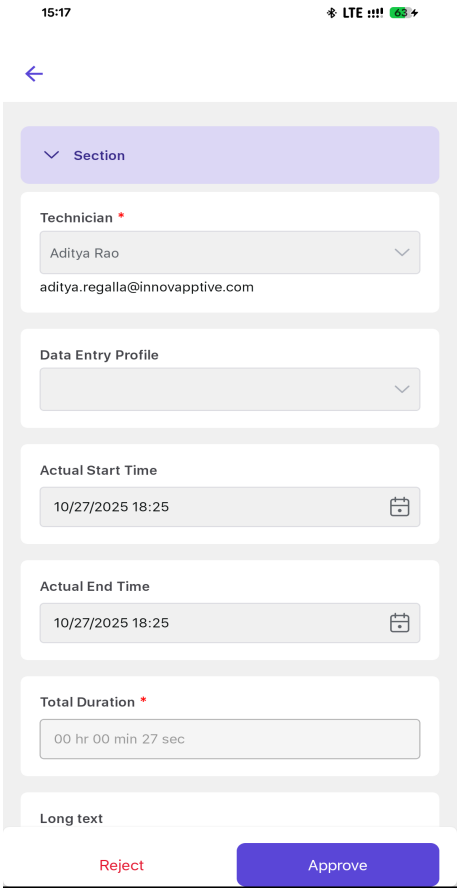


5. Review the submitted details, such as Work Order Number, Work Order Description, Time Logged, and Operation Number.
6. Tap **Approve** to approve the timesheet.

   Or

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

Figure 9-2 Timesheet Details



Note:

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

10. Personalize Your App with Theme and Language Options

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

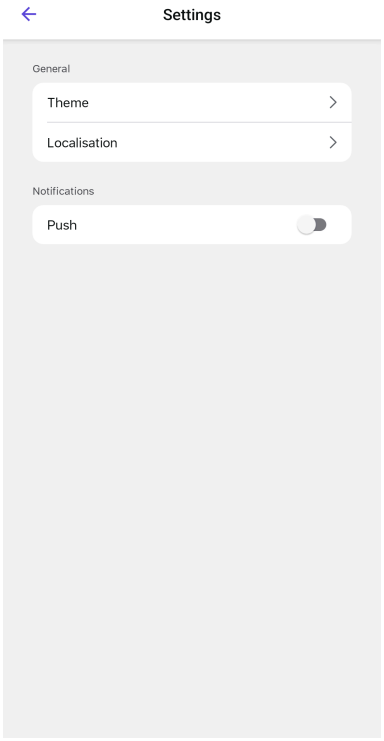
Switch between Dark and Light Modes

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

To change the mode or theme:

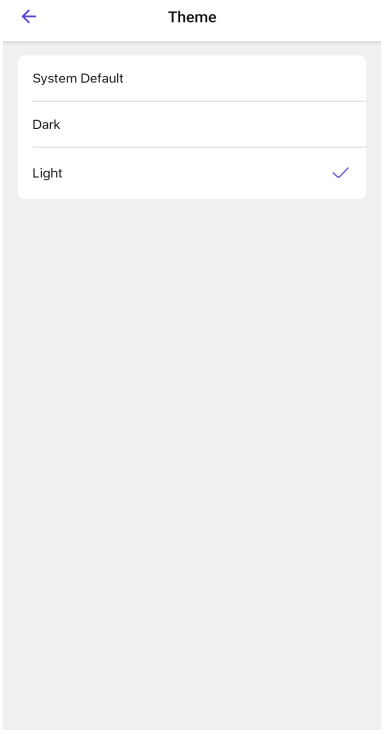
1. Navigate to the **More** screen and open **Settings**.

Figure 10-1 Settings Screen



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

Figure 10-2 Themes Screen



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

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

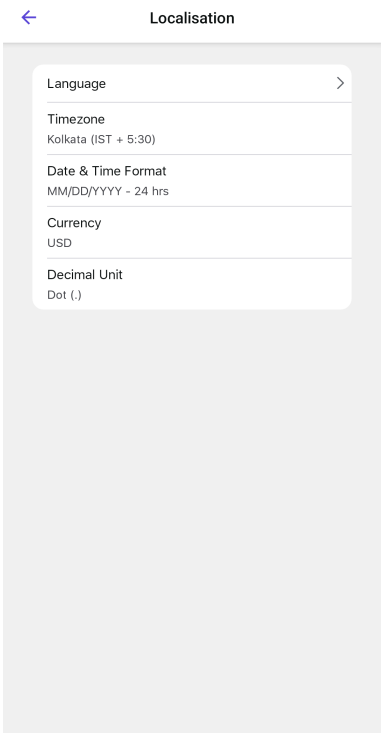
Choose Language

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

To choose the language of your choice:

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

Figure 10-3 Localization Screen



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

The labels and messages appear in the selected language.

11. View Equipment Details

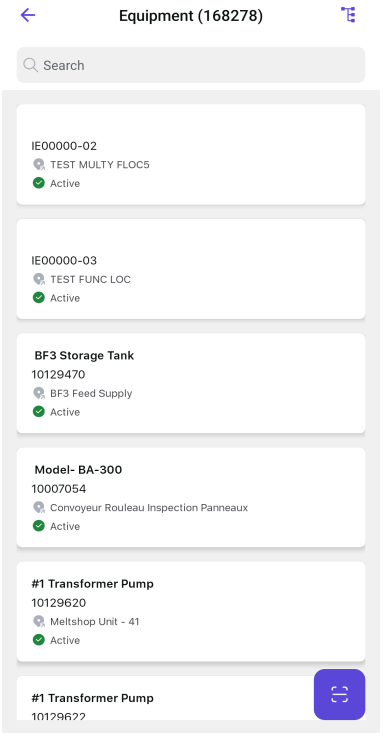
Equipment refers to any machine or physical asset that requires regular maintenance, inspection, or repair to keep it running safely and efficiently. This can include industrial machinery, tools, and infrastructure used across various industries. Regular maintenance helps prevent breakdowns, improve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

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

To view the equipment details:

1. Navigate to the **More** screen.
2. Select the **Equipment** module.
3. Select the Equipment from the list to view details.

Figure 11-1 Equipment Screen



Or

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

The scanner reads the code and displays the equipment details.

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

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

Dashboard – Monitor Work Orders and Issues

The Asset 360 Dashboard tab in the Equipment module gives you a real-time, centralized view of the asset's condition. It displays:

- Health scores
- Performance trends
- Critical alerts

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

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

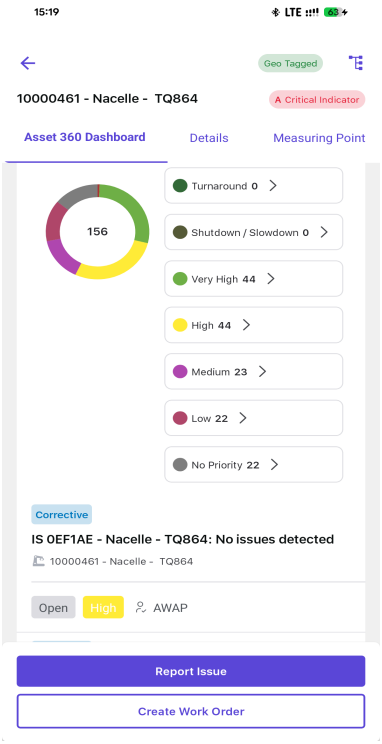
From the Dashboard tab, you can also:

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

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

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

Figure 11-2 Equipment - Dashboard

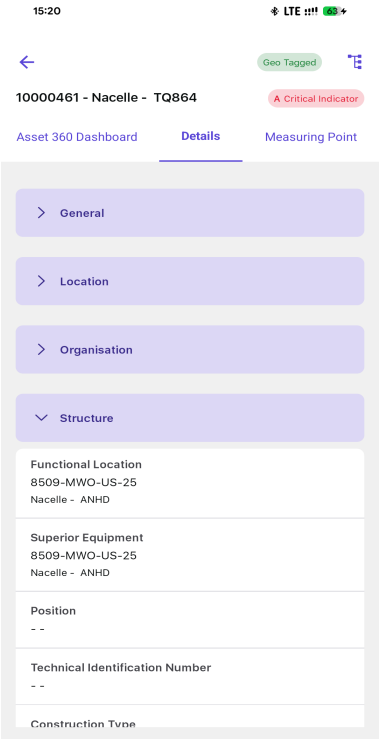


Details – Access Equipment Information

View key equipment details, including:

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

Figure 11-3 Equipment - Details



Measuring Point – Monitor Performance Metrics

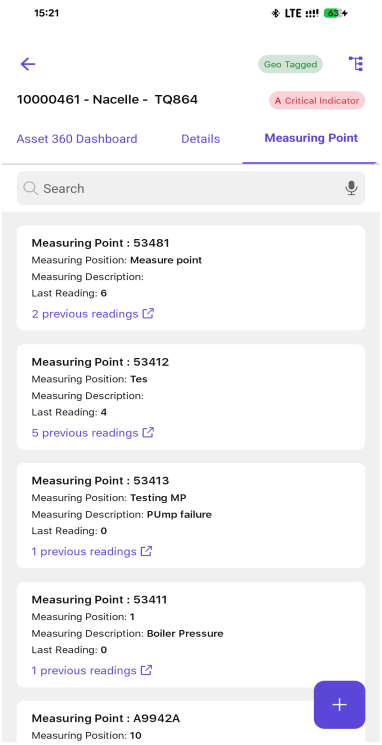
The Measuring Points tab is available in the following sections:

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

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

- Search Measuring Points using either the description or the measuring point number.
- View measuring points with details such as:
    - Measuring Point ID, Position, Description, Last Reading, and Previous Readings Count.
- Search measuring point either by description or measuring point number.
- **Tap the reading link** to review previous readings.
- **Take a New Reading** by selecting **Take Reading** in the **Reading** screen.
- **Add a New Measuring Point** by tapping the **Add** icon. For more information, see Create a Measuring Point *(on page 109)*.

Figure 11-4 Equipment - Measuring Point



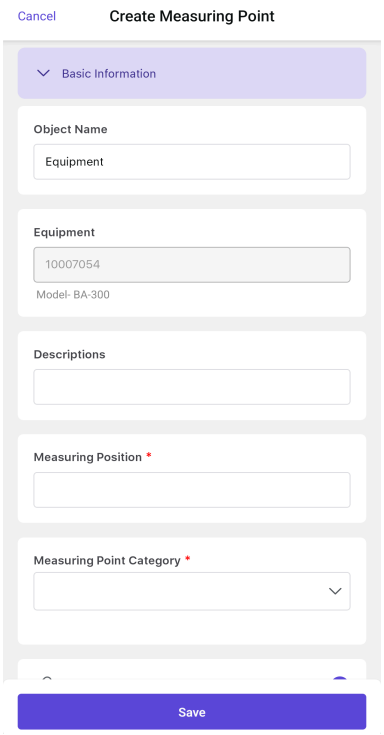
11.1. Create a Measuring Point

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

To create a measuring point:

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

Figure 11-5 Create Measuring Point



Basic Information

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

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

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

Measurement Range

- **Lower Range and Upper Range Limits:** Define acceptable measurement thresholds.

5. Tap **Save** to finalize and create the measuring point.

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

> **Note:**
> You can edit Measuring Points only if you have the required permissions. Contact your administrator if you need access.

12. View Functional Location Details

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

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

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

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

To view the Functional Location details:

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

   Or

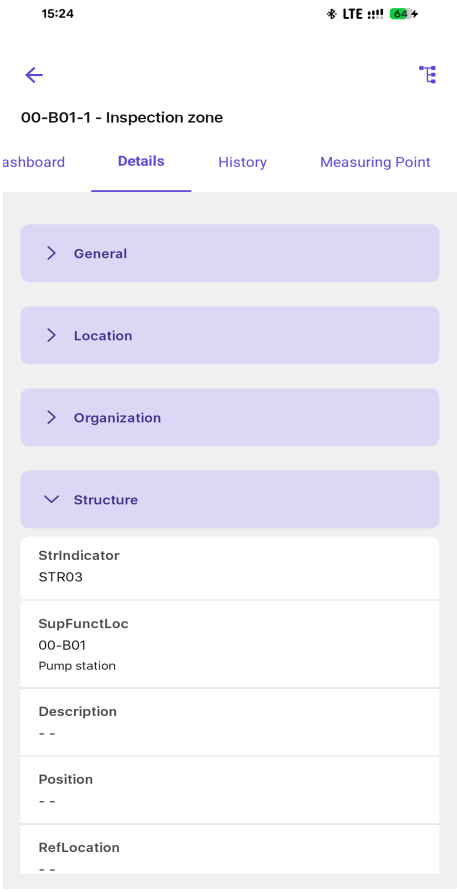
   Tap the **Scan** icon at the bottom-right corner and scan the QR code on the location. The scanner reads the code and displays the functional location details.

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

   To navigate upward through the hierarchy:

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

Figure 12-1 Functional Location Details



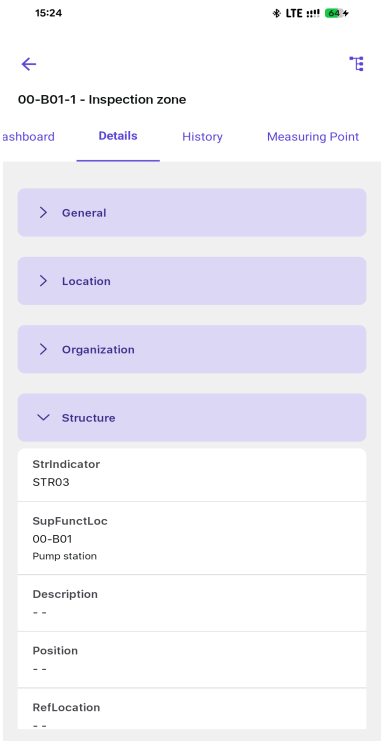
Details – Access Functional Location Information

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

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

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

Figure 12-2 Functional Location - Details



History – Track Equipment and Maintenance Records

Check past maintenance activities and equipment history:

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

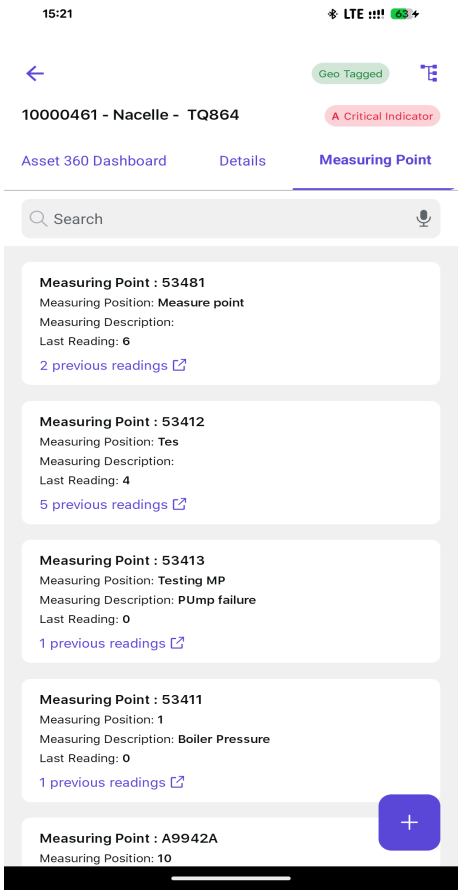
Measuring Point – Monitor Equipment Performance

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

- View measuring points with details such as:
    - **Measuring Point ID**
    - **Measuring Position**
    - **Measuring Description**
    - **Last Reading and Previous Readings Count.**
- Tap the **reading link** to review historical readings.
- Take a new reading by selecting **Take Reading** in the **Reading** screen.
- Add a New Measuring Point by tapping the **Add** icon. For more information, see Create a Measuring Point *(on page 109)*.

Figure 12-3 Functional Location - Measuring Point

Figure 12-4 Measuring Points



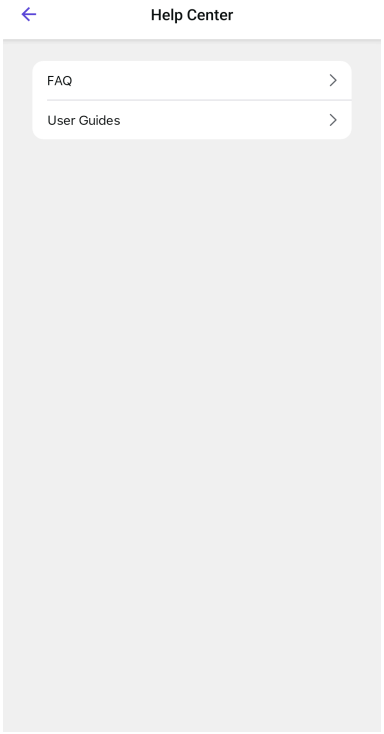
13. Access Help Center

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

To access the Help Center:

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

   Figure 13-1 Help Center



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

14. View User Profile

This section shows how to view a user profile, providing access to key information and settings for each user.

To access and view the user profile:

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

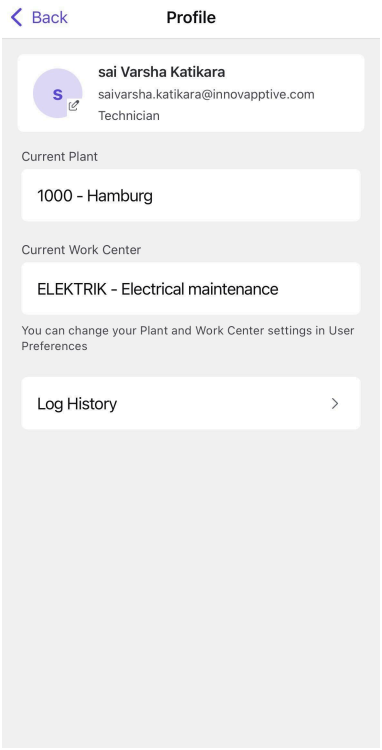
Or

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

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

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

Figure 14-1 User Profile



14.1. View Log History

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

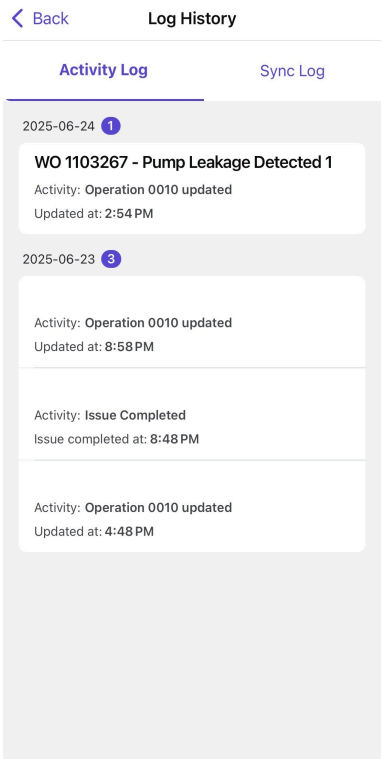
To view log history:

1. Navigate to the **Profile** screen.
2. Tap on the **Log History** section.
   The **Log History** screen has following two tabs:

   Activity Log

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

Figure 14-2 Activity Log



Sync Log

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

Figure 14-3 Sync Log