iMaintenance User Guide for Technicians

Connected Worker Solutions

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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 Technicians in iMaintenance

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

New Features and Enhancements in Release 2511

Table 1-1 New Features and Enhancements in Release 2511

Control Issue Editing Based on Completion Status (iOS)

Technicians can update the issue details until the issue status changes to "Completed" or "Rejected". This helps supervisors and technicians make real-time corrections directly in the app and ensure data integrity through the work order lifecycle. These permissions to edit are role-based and are configured using RACE.

For more information, see Create an Issue *(on page 71)*.

Restrict Edit Access for Confirmed Operations (iOS)

Prevent the edit option from appearing for operations with CNF (Confirmed) status to maintain data integrity. This ensures that operations locked after confirmation cannot be modified through any navigation path in the app. Edit restrictions are enforced based on operation status across all entry points.

For more information, see Execute Operations *(on page 84)*.

Enhance Form Logic Capabilities Aligned with RACE (iOS)

Ensure complete alignment between RACE configuration and the mobile experience by enabling support for Ask Evidence and Mandate Question conditional logics in embedded forms. With this enhancement, all conditional rules configured in RACE—such as Hide Section, Ask Question, Hide Question, Raise Issue, Ask Evidence, and Mandate Question—will now function seamlessly within the app.

For more information, see Capture Asset Data using Forms *(on page 89)*.

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

Create Issues from a Single Screen (iOS)

Enable users to create and submit issues from a single screen with all required fields visible and editable at once. This eliminates the need to switch between multiple pages during issue creation and streamlines the reporting process. All fields are validated before submission to ensure data completeness.

For more information, see Create an Issue *(on page 71)*.

Support Issue History Popup in Offline Mode (iOS)

Display the issue history popup showing existing open issues for equipment and functional locations even when working offline. This prevents duplicate issue creation by allowing users to review past issues before submitting new ones. The popup now works for both equipment and functional location contexts.

For more information, see Create an Issue *(on page 71)*.

Auto-Populate Reported By Field with User Name (iOS)

Automatically fill the "Reported By" field with the logged-in user's full name during issue creation. This eliminates manual entry of user information and reduces the steps required to report issues. The field populates as soon as the issue creation screen loads.

For more information, see Create an Issue *(on page 71)*.

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 46)*.

Display All Task Tabs in Tasklist (iOS)

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

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 Home (Dashboard) *(on page 46)*.

Retain Dashboard Filters Across Navigation (iOS)

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 46)*.

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 46)*.

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 46)*.

Clear Form Validation Errors Immediately (iOS)

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

Remove mandatory field error indicators immediately when users enter valid values in forms. This provides instant feedback about form completion status and eliminates the need to navigate away and back to clear error states. The validation clearing applies to all mandatory fields across forms.

Display Sync Status for Operation Activities (iOS)

Show sync status in the Outbox for operation confirmation and timesheet-related activities after approval or rejection. This lets users track whether their timesheet approvals and operation confirmations have successfully synced to the backend. The status displays for both single and multiple operation confirmations.

For more information, see Use Application in Offline Mode *(on page 66)*.

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 42)*.

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 104)*.

Mixpanel Integration for Login & Sync (iOS & Android)

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.

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

Mixpanel Integration for Work Order Execution (iOS & Android)

Enhance the appilcation with Mixpanel analytics to gain deep visibility into how users interact with the Work Order Execution module. Track clicks, screen navigations, time spent on each screen, and key user attributes to understand real behavior, optimize workflows, and improve overall efficiency.

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 100)*.

Geo Tag Configuration for Equipment Module (iOS & Android)

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 100)*.

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 39)*.

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

Consolidated Outbox Entry for Work Orders (iOS & Android)

Simplified your Outbox view with a smarter, more streamlined experience. With this en-
hancement, when a work order is created but not yet synced (due to offline mode or post-
ing 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 66)*.

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 au-
tomated determination.

For more information, see Create an Issue *(on page 71)*.

Flexible Work Order Completion Based on Tenant Configuration (iOS & Android)

Enabled seamless work order management with the ability to complete work orders with or
without form submission and operation completion, based on tenant-specific settings. This
enhancement allows organizations to tailor the workflow to their operational requirements,
improving efficiency and compliance.

For more information, see Execute Operations *(on page 84)*.

Introduced Breakdown Toggle in Issue and Work Order Screens (iOS & Android)

Enhance flexibility and data accuracy with the new Breakdown toggle feature, now avail-
able 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 an Issue *(on page 71)*.

User-Friendly Crash Message with Relaunch Option (iOS & Android)

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

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.

Dashboard Widget Layout & Behavior Updates (iOS & Android)

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 46)*.

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 46)*.

Enhanced Timeline Filters with Custom Date Range Option (iOS & Android)

Select a custom date or date range directly from the timeline filters, giving technicians 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 46)*.

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

Supports Conditional Logic for Dropdown Response Types (iOS & Android)

Enhanced Embedded Forms by enabling conditional logic on single and multi-selection dropdown response types. This feature allows form creators to configure dynamic behaviors—such as showing or hiding fields, requesting evidence, or triggering automated actions—based on user selections. By tailoring forms to real-time inputs, this capability streamlines workflows, ensures higher data accuracy, and reduces manual effort in the field.

For more information, see Capture Asset Data using Forms *(on page 89)*.

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 Capture Asset Data using Forms *(on page 89)*.

View of Images/Documents Uploaded via Instruction Response Type (iOS & Android)

Technicians 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.

For more information, see Capture Asset Data using Forms *(on page 89)*.

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)

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

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 100)*.

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. The form fields are automatically populated from the work order header details while executing a form by technicians based on the configurations. This feature ensures consistency, reduces manual entry, and gives administrators control over how data is captured.

For more information, see Capture Asset Data using Forms *(on page 89)*.

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 an issue. It reduces manual entry, ensures data accuracy, and streamlines the work order creation process for technicians and supervisors.

For more information, see Create an Issue *(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 technicians quickly locate the exact documents they need without sifting through mixed files.

For more information, see Add Attachments *(on page 91)*.

Quick Access to Operation History in Bulk Confirmation Flow (iOS & Android)

Technicians can now instantly view past confirmations of each operation without leaving the Bulk Completion screen. A new History button beside every operation provides a one-click view of previous confirmations, streamlining verification and decision-making.

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

For more information, see Confirm Multiple Operations at Once *(on page 88)*.

Smarter Bulk Confirmation with Easy Copy Option (iOS & Android)

Technicians can now save time by duplicating existing time log entries in the Bulk confirmation flow. The new Copy button allows them to quickly replicate an entry, modify only the Time Spent field, and save it—eliminating the need to re-enter all details manually.

For more information, see Confirm Multiple Operations at Once *(on page 88)*.

Streamlined Bulk Confirmation for Technicians (iOS & Android)

Technicians can now log time, select and confirm multiple operations at once, and edit details in the Bulk Confirmation flow, minimizing navigation and simplifying the workflow. This intuitive inline approach reduces effort, prevents errors, and accelerates confirmation activities.

For more information, see Confirm Multiple Operations at Once *(on page 88)*.

Spot New Items Instantly & Auto-Open GOS Attachments (iOS & Android)

Technicians 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 iMaintenance Dashboard and Main Screens *(on page 46)*.

Clear Operation Details with Easy Navigation (iOS & Android)

Technicians can now see both the operation number and description clearly, with a convenient drop-down to switch between operations. This design reduces screen clutter and makes operation details more accessible, enabling faster navigation and smoother workflow.

For more information, see Execute Operations *(on page 84)*.

Attach Files Directly in Embedded Forms (iOS & Android)

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

Technicians can now add attachments directly within embedded forms in the mobile app. These attachments are automatically included in the generated PDF after form submission, ensuring complete documentation of the work performed. Attachments remain linked exclusively to the form, maintaining clear separation from Work Order GOS/DMS files.

For more information, see Capture Asset Data using Forms *(on page 89)*.

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 46)*.

Find Quickly What You Need with Search and Filter (iOS & Android)

Technicians 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 62)*.

Organized Work Order Details with Separate Tabs (iOS & Android)

Technicians can now access Components, Forms, and Attachments within each Work Order Operation through separate, clearly labeled tabs. This organized layout replaces the single, cluttered card view, allowing users to quickly find and interact with the section they need.

For more information, see Execute a Work Order *(on page 79)*.

Restrict Forms Editing After Submission (iOS & Android)

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

Submitted forms and versions are now restricted from editing, ensuring that once a form is submitted, its data remains accurate and compliant. Users can still view submitted forms, but any changes require creating a new version or submitting a new form, preventing errors, unauthorized updates, and miscommunication.

For more information, see Capture Asset Data using Forms *(on page 89)*.

Assign and Start Operations Directly from List (iOS & Android)

Technicians can now take ownership and start operations directly from the Operations list using the new Assign to Me and Start buttons displayed upfront on each operation. This eliminates the need to open each operation in detail view, saving time and streamlining workflow.

For more information, see Execute Operations *(on page 84)*.

Quickly Navigate Between Forms Using Dropdown (iOS & Android)

Users can now navigate to the next form directly from the current form using the form description dropdown. This eliminates the need to return to the main menu, making it faster and easier to work on multiple forms within the same Work Order or process.

For more information, see Capture Asset Data using Forms *(on page 89)*.

Update Work Orders Quickly Without Extra Navigation (iOS & Android)

Technicians 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 Execute a Work Order *(on page 79)*.

Seamless Form Navigation After Submission (iOS & Android)

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

Users can now move directly to the next form from the submission confirmation screen of the current form using the new "Go to Next Form" button. This eliminates the need to return to the forms list or dashboard, streamlining the workflow and saving time when handling multiple forms in sequence.

For more information, see Capture Asset Data using Forms *(on page 89)*.

Stay Connected with Chat Throughout Execution (iOS & Android)

The chat icon is now accessible across all screens within the Work Order execution flow, not just on the Work Order Execution Details screen. This ensures technicians and supervisors can communicate instantly at any stage of work order execution without navigating away from their current task.

For more information, see Execute a Work Order *(on page 79)*.

Attach Forms Instantly from the Forms Tab (iOS & Android)

Technicians 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 Capture Asset Data using Forms *(on page 89)*.

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 Execute Operations *(on page 84)*.

View Instruction Images in Submitted PDFs (iOS & Android)

Users can now view images added as part of instructions directly in the submitted PDF forms. This ensures clarity and provides visual guidance during form review, enhancing understanding and reducing errors.

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

For more information, see Capture Asset Data using Forms *(on page 89)*.

View Instructional Media Directly in Mobile Forms (iOS & Android)

Technicians can now view images, documents, and videos uploaded via the Instruction response type directly within mobile forms. This ensures all instructional content is easily accessible during task execution, providing clear guidance and reducing confusion in the field.

For more information, see Capture Asset Data using Forms *(on page 89)*.

Track and Update User Status in Operations (iOS & Android)

Users can now view and update the new User Status field directly within the Operations screen. Status options are fetched from SAP based on the status profile linked to the Order Type, allowing users to accurately track and manage the progress of operations.

For more information, see Execute Operations *(on page 84)*.

Start Operations Instantly Without Validations (iOS & Android)

Technicians can now start operations seamlessly without enforcing validations for collecting components or attaching permits. This flexibility removes unnecessary delays in the mobile app and allows operations to begin immediately when these prerequisites are not required or are already handled externally.

For more information, see Execute Operations *(on page 84)*.

Navigate Directly from Dashboard Section Headers (iOS & Android)

Technicians 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 46)*.

Formula-Based Field Calculations in the App (iOS & Android)

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

Users can now define formulas for specific fields in RACE, enabling automatic calculations in the app based on other dependent input fields. This feature ensures accurate, dynamic field updates without manual computation, improving efficiency and reducing errors.

For more information, see Capture Asset Data using Forms *(on page 89)*.

Dynamic Code Group Dropdowns Based on Catalog Profiles (iOS & Android)

The values in the Code Group dropdowns now load or filter dynamically in the Header, Items & Damages, Causes, Tasks, and Activities screens when creating or updating an issue in the application. The dropdown values are automatically prioritized and filtered based on Equipment (EQ), Functional Location (FL), Construction Type, or Issue Type from the associated catalog profiles.

For more information, see Create an Issue *(on page 71)*.

Collect Components Seamlessly in the Application (iOS & Android)

Technicians can now issue (mark as collected) required components or materials directly from the mobile app for each operation while ensuring SAP validation and data consistency. This enhancement empowers field users to manage materials efficiently, accurately, and compliantly within the application.

For more information, see Collect Components *(on page 83)*.

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)

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

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.
Track Your Operations Directly from Dashboard (iOS & Android) Technicians can now see all operations assigned to them directly on the homepage dashboard under a new section called My Operations. This section displays the current status, key details, and progress of each operation, enabling technicians to quickly track and prioritize their work. For more information, see Home (Dashboard) *(on page 46)*.
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 104)*.
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 46)*.
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.

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

For more information, see Home (Dashboard) *(on page 46)*.
Prevent Accidental Deletions in Work Orders (iOS & Android) 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 Execute a Work Order *(on page 79)*.
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 an Issue *(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 an Issue *(on page 71)*.
Clear Unit of Measurement Visibility for Accurate Data Entry (iOS & Android)

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

Technicians now have clear visibility of the expected Unit of Measurement (UoM) when entering numeric values in mobile forms. This enhancement reduces data entry errors, improves form clarity, and ensures consistent, high-quality data—especially in compliance-driven environments. For more information, see Execute a Work Order *(on page 79)*.
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 Capture Asset Data using Forms *(on page 89)*.
Sequential Display of Conditional Questions in Forms and PDFs (iOS & Android) Embedded forms display questions and tasks in a logical sequence based on the conditional logic for Text and Numeric response types. As users answer, only the relevant next questions appear, creating a guided, step-by-step experience. The same sequence is preserved in the generated PDF, ensuring the printed or shared form matches exactly what was shown on-screen. For more information, see Capture Asset Data using Forms *(on page 89)*.
Consistent Section Visibility in PDF Reports (iOS, Android) This enhancement ensures that sections hidden in a form due to conditional logic or role-based restrictions remain hidden in the exported PDF. It eliminates inconsistencies where hidden sections currently appear in PDFs, preventing exposure of unnecessary or confidential data. The PDF output exactly matches the visible content at submission, supporting both manual and automated exports. For more information, see Capture Asset Data using Forms *(on page 89)*.
Auto-Populate Operation Number for Single-Operation Work Orders (iOS)

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

Technicians 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 Collect Components *(on page 83)*.

Improved AI Accuracy for Follow-Up Issues with Work Order ID (iOS & Android)

Creating follow-up issues just got faster, smarter, and more accurate. By using the Work Order ID as a context key, AI taps into relevant history—Equipment, Functional Location, and past WO details—to deliver spot-on suggestions for Title, Description, Priority, and more.

For more information, see Create a Follow-up Issue *(on page 93)*.

Improved AI Accuracy with EQ/FL Context in Issue 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 an Issue 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 an Issue *(on page 71)*.

Hide Conditional Fields in Submitted Form and PDF (iOS & Android)

Forms now automatically exclude any fields hidden by conditional logic at the time of submission. These fields are neither included in the submitted data nor displayed in the generated PDF, ensuring only relevant information is captured and shared. This enhancement enhances the user experience, supports data privacy, and maintains clean and audit-ready records.

For more information, see Capture Asset Data using Forms *(on page 89)*.

View Offline Messages in Chat (iOS & Android)

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

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 46)*.

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 Attachments *(on page 91)*.

Clear Messages for Failed AI Responses (iOS & Android)

When you create an Issue 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 an Issue *(on page 71)*.

View References for AI-Detected Priority (iOS & Android)

When you create an Issue 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 an Issue *(on page 71)*.

Post Operation Confirmation Without Timesheet or Timesheet Without Operation Confirmation (iOS & Android)

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

Introducing a configurable setting that allows enterprises to choose between posting Operation Confirmation without Timesheet entry or posting Timesheet without confirming the operation—tailored to fit diverse business workflows.

For more information, see Execute Operations *(on page 84)*.

Zoom In/Out for Attachments in Forms and Attachment Section (iOS & Android)

Users can now zoom in and out while viewing attachments (documents or images) within the attachments section and submitted forms. This improves readability for files with small text or detailed diagrams, minimizing errors and ensuring accurate understanding in the field.

For more information, see Add Attachments *(on page 91)*.

New Features and Enhancements in Release 2506

Table 1-4 New Features and Enhancements in Release 2506

Capture and Manage Follow-Up Issues On the Go (iOS & Android)

Technicians can now raise follow-up issues while actively working on a Work Order—whether it's a newly discovered fault or additional maintenance required. For example, if a technician spots a frayed cable while replacing a fan motor, they can log a new issue immediately without leaving the current task.

They can choose to link the new issue to the current Work Order or create it as an independent issue. This helps ensure all findings are documented and reduces the chances of unreported problems.

For more information, see Create a Follow-up Issue *(on page 93)*.

Track Overdue Work Orders from the Dashboard (iOS & Android)

Technicians can now view all overdue Work Orders right from the dashboard—along with their priority and count. This enables faster identification and prioritization of critical tasks, ensuring nothing falls through the cracks.

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

For more information, see Home (Dashboard) *(on page 46)*.

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

Technicians 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 46)*.

Filter Issues by Priority, Status, and Type on the Dashboard (iOS & Android)

The Issues widget now supports filters for priority, status, and type—enabling technicians to quickly drill down into the most relevant issues from the homepage. This enhancement improves focus, speeds up response times, and streamlines issue management.

For more information, see Home (Dashboard) *(on page 46)*.

Visualize Complete Functional Location Hierarchies (iOS, Android)

Supervisors and Technicians 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 107)*.

View Complete Equipment Hierarchy (iOS)

Technicians 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 100)*.

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.

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

For more information, see Home (Dashboard) *(on page 46)*.
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 Complete a Work Order *(on page 95)*.
View Complete Functional Location Context in the Mobile App (iOS & Android) Technicians 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 107)*.
Capture Real-Time Location in Forms (iOS & Android) Technicians can now auto-capture GPS coordinates directly within embedded digital forms using the new Geo Location response type—ensuring accurate location data without manual entry. For more information, see Capture Asset Data using Forms *(on page 89)*.
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 53)*.
Geo-Tagging for Accurate Equipment Suggestions (iOS & Android) Users can now send geographic coordinates along with prompts when creating issues. This enables the AI engine to recommend the most accurate equipment based on real-time location context.

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

For more information, see Create an Issue *(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 53)*.

New Features and Enhancements in Release 2505

Table 1-5 New Features and Enhancements in Release 2505

Self-Assign and Confirm Operations On the Go (iOS & Android)

Technicians can now take ownership of operations even if no one is pre-assigned in SAP. For instance, if a technician arrives at a site and sees an unassigned operation in their Work Order, they can assign it to themselves and complete it without waiting for supervisor input.

This feature improves flexibility in the field and keeps work progressing without unnecessary delays.

For more information, see Execute Operations *(on page 84)*.

View Reported Issues While Executing Embedded Forms (iOS & Android)

While executing a form within a Work Order or Operation, technicians can now view previously reported issues related to that asset or location.

For instance, if a pump has a history of leaks, the technician can review earlier reports before completing the form, avoiding duplicate entries and gaining better context.

For more information, see Capture Asset Data using Forms *(on page 89)*.

Trigger SAP Notifications from Embedded Forms (iOS & Android)

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

Technicians can now automatically create SAP Notifications while filling out embedded forms. Notifications are triggered based on specific conditions—such as selecting a check-box labeled "Critical Failure" or entering a temperature above 90ºC in a measurement field. This feature ensures that high-priority issues are escalated to SAP workflows without relying on manual follow-up. For more information, see Capture Asset Data using Forms *(on page 89)*.
Assign SAP Code Groups and Codes for Accurate Issue Categorization (iOS) Technicians and supervisors can now assign SAP-standard Code Groups and Codes while creating, updating, or viewing issues—even if catalog profiles haven't been defined in SAP. For example, if a technician reports a pump vibration issue, they can select a relevant Code Group like "Mechanical Failure" and a Code like "Bearing Worn Out." For more information, see Create an Issue *(on page 71)*.
Streamline Issue Lifecycle with User Status Control (iOS & Android) Technicians 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 Create an Issue *(on page 71)*.
Quickly Duplicate and Report New Issues from Existing Ones (iOS & Android) Users can now create a new issue by duplicating an existing one. For instance, if a recurring valve leak needs to be reported again in a different location, the technician can reuse most details and just modify the location field. For more information, see Create an Issue from Existing One *(on page 77)*.
Track Real-Time Issue Logs with In-App Log History (iOS & Android)

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

Each action related to issues—such as creation, status change, or comments—is now captured in a real-time log visible during the user's session. For example, if a technician changes the priority of an issue, or if the system updates a field based on a rule, all of these changes are logged for transparency. For more information, see View Log History *(on page 118)*.
Select Equipment & Functional Location Instantly During Issue 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 an issue. For more information, see Create an Issue *(on page 71)*.
Contextual Chat for Real-Time Collaboration (iOS & Android) Technicians an 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 46)*.
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 46)*.
View and Manage SharePoint Attachments Within iMaintenance (iOS & Android) Technicians can now view, add, annotate, and manage SharePoint attachments—such as PDFs, images, and documents—directly within the mobile app. For more information, see Add Attachments *(on page 91)*.

New Features and Enhancements in Release 2504 (Beta)

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

Raise Issues Instantly When Exceptions Are Found in Forms (iOS, Android)

Forms are no longer just for data entry—they now help you spot problems in real time. With this update, users can automatically trigger issue creation from within a form when critical values or responses fall outside expected limits.

Whether it's a failed inspection reading or a non-compliant selection, the system flags it immediately and prompts the user to raise an issue—right then and there.

For more information, see Create an Issue *(on page 71)*.

Capture and Track Measurements Seamlessly During Execution (iOS, Android)

Technicians can now capture and post measurement and counter readings directly while confirming work order operations—either individually or in bulk. This ensures critical data is recorded accurately at the point of task completion and fully integrated with SAP.

For more information, see Execute a Work Order *(on page 79)*.

View Measuring Points While Executing or Confirming Work Orders (iOS, Android)

Technicians can now access all relevant measuring points—across operations, equipment, and functional locations—while executing individual tasks or confirming multiple operations in bulk. This enhancement brings full measurement visibility into the flow of work, helping ensure accuracy, compliance, and real-time access to critical data from SAP.

For more information, see Execute a Work Order *(on page 79)*.

Rectify Threshold-Exceeding Readings Before Submitting (iOS, Android)

When capturing measurement readings, users now have the option to cancel the submission if the value exceeds configured thresholds—giving them the chance to review and correct entries before continuing. This prevents false issue reports and ensures accurate, trusted data is sent to SAP.

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

For more information, see Execute a Work Order *(on page 79)*.

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
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**

System	Minimum Requirements
	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. 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:

- Log in to the iMaintenance Application *(on page 39)*
- iMaintenance Dashboard and Main Screens *(on page 46)*
- Buttons and Icons in Application *(on page 57)*

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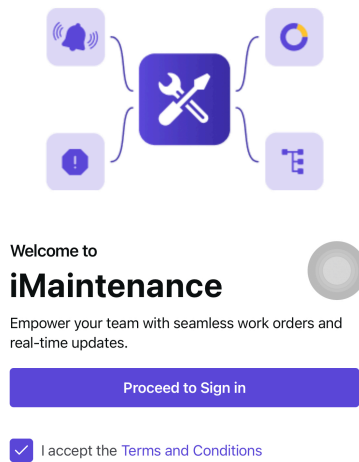
3. In the **Domain** screen, enter the company domain and tap **Next**.

Figure 2-2 Domain Screen

🛠 **iMaintenance**

Domain

Enter your Company Domain
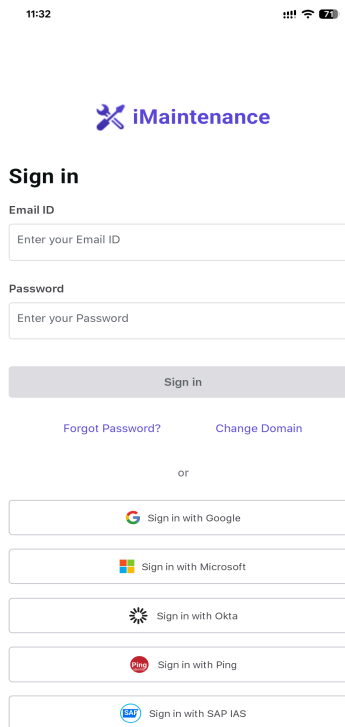
| | .innovapptive.com |

Next

Don't have a domain?
Visit our website to connect with our sales team.

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

Figure 2-3 Sign In Screen

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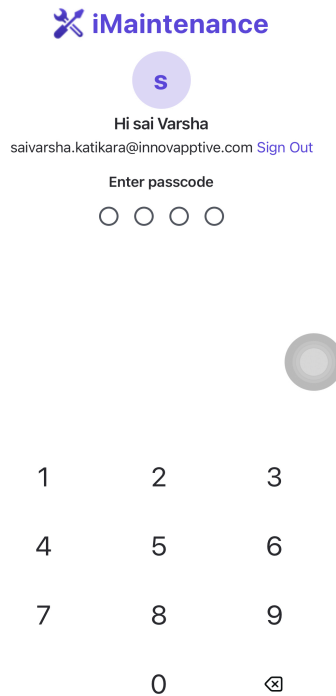
> **Note:**
> ◦ The passcode is device-specific. If you use a new device, you must create a passcode for that device again.
> ◦ If you share the device with other users across shifts, set a new passcode after each sign-out to keep your session secure. You must also set a new passcode whenever you reinstall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

Hi Nagarjuna,
Preparing your data for offline access. Please wait…
Download Speed: 0 Byte/s

Master Data

90.99 %

Attachments

95.83 %

Master data & Attachment data sync in progress… 1 min 21 sec

Please **DO NOT** close the app or go back until the sync completes.

Signout

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

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

2.2. iMaintenance Dashboard and Main Screens

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

The application consists the following screens:

- Home (Dashboard) *(on page 46)*
- Work Orders *(on page 53)*
- Issues *(on page 55)*
- Alerts *(on page 56)*
- More *(on page 56)*

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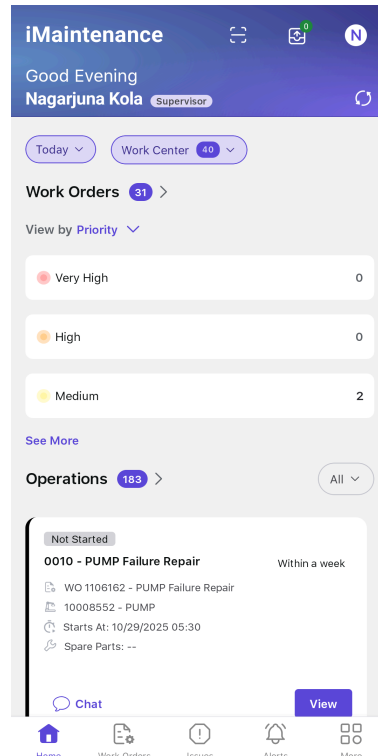
Productivity Hack: Tap any dashboard section header (e.g., **Work Orders**, **Overdue Work Orders**, or **Issues**) to view a complete or filtered list of items for that section.

- **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

N

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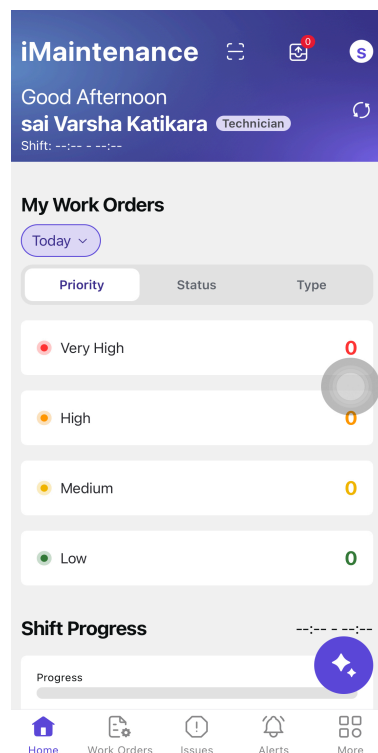
Productivity Hack: Tap section headers (e.g., Work Orders, Issues) to view filtered lists instantly.

- **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
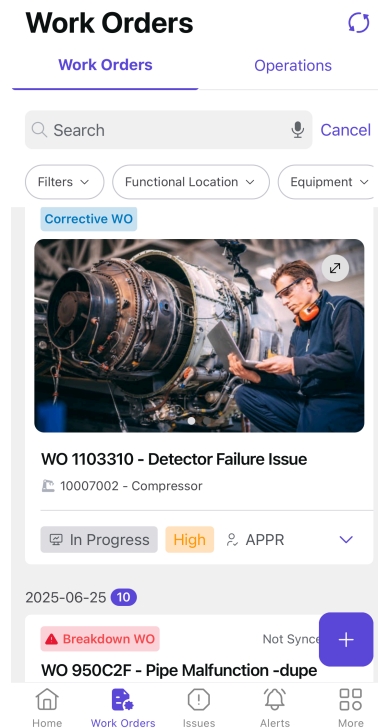
On this screen, you can:

- 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
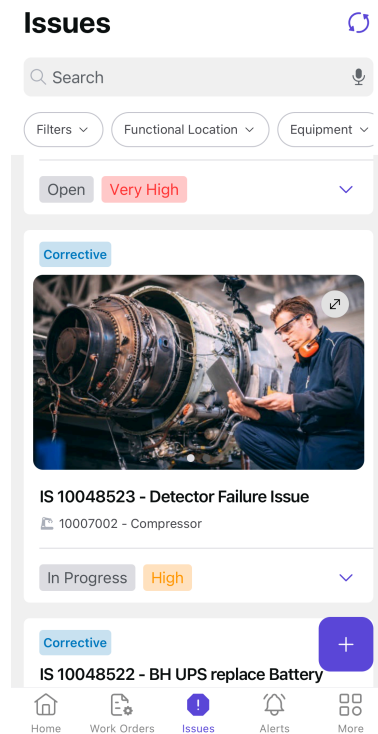
On this screen, you can:

- 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
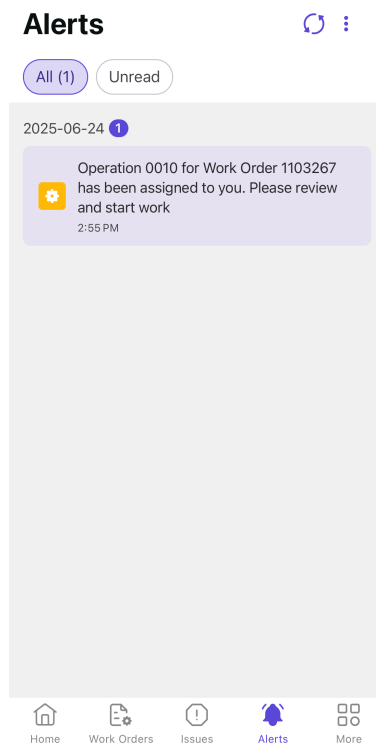
2.2.5. More

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
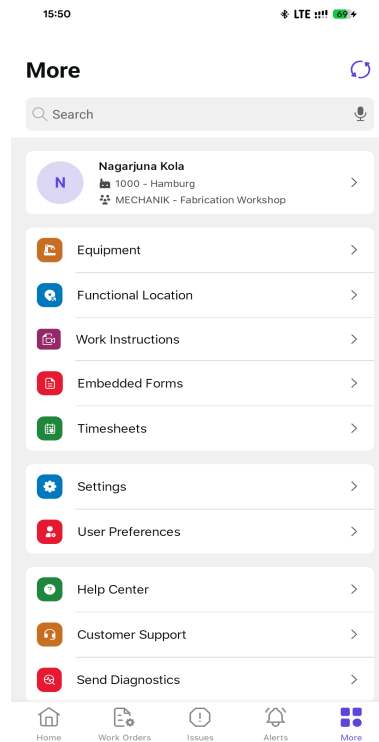
On this screen, you can:

- **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
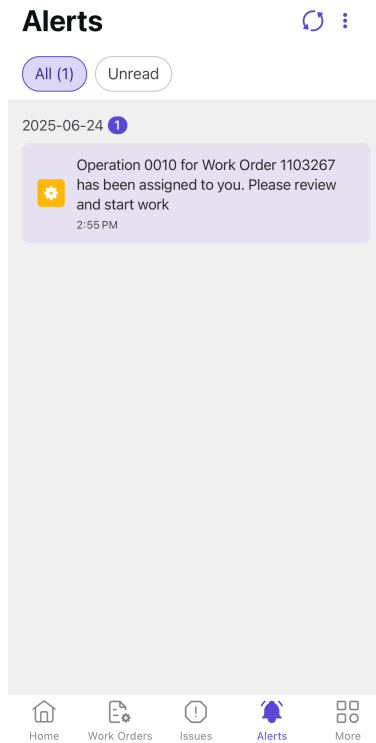
2. Tap **All** to view all the alerts.
3. Tap **Unread** to view only unread alerts.

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
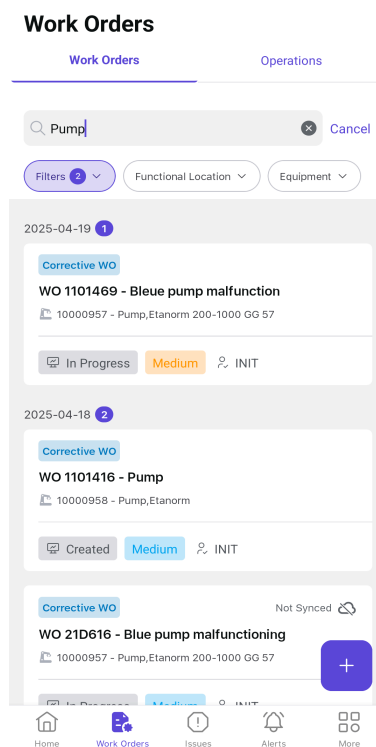
The search results are displayed.

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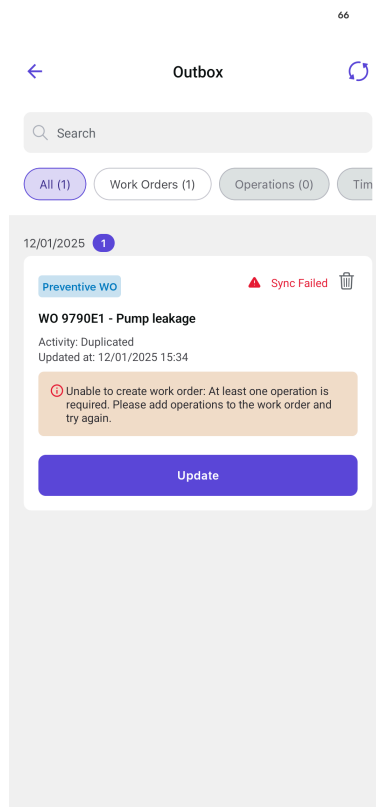
The application automatically switches to offline mode when your device loses network connectivity, allowing you to continue working as in online mode. Any changes made in offline mode are saved locally and sync automatically to the server once the device reconnects.

> ✏️ **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. Create an Emergency Work Order

If an asset malfunctions or requires immediate attention, you can create an **Emergency** or **Breakdown Work Order** to ensure a quick response and minimize downtime.

To create an emergency work order:

1. Navigate to the **Work Orders** screen.
2. Open a work order
3. Tap the More ⬮ icon in the top-right corner and select **Raise Breakdown Work Order**.

Figure 6-1 Raise Breakdown Work Order
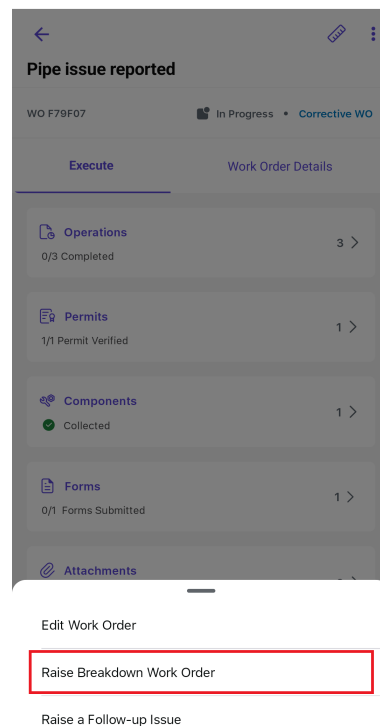
4. In the Create Work Order screen, fill the details and submit. For information, see *Create Work Order* topic in Supervisors user guide.

7. Create Issues for Equipment Repair or Maintenance

Timely issue reporting helps prevent equipment failure and reduces unplanned downtime. The **iMaintenance** app makes it easy to capture and communicate problems as they happen.

What Happens When You Create an Issue

When you report an issue related to an asset:

- The supervisor receives an **instant alert**
- The issue is reviewed, and if needed, the supervisor may:
    - Request more information
    - Inspect the equipment on-site
- Based on the assessment, the issue is either:
    - **Converted into a work order** for maintenance

    - **Rejected** if no action is required

Create Issues Faster with AI Assistance

To make reporting faster and easier, iMaintenance includes **AI-powered suggestions** and smart input options:

- **Smart Input Assistant (SIA)**: Enter a prompt describing the issue (e.g., *"oil leak near pump"*), and the app automatically fills in related fields like equipment, functional location, and severity.
- **Image Capture**: Tap the **Camera icon** to take or upload a photo of the issue.
- **Voice Commands**: Tap the **Mic icon** and simply speak to report the issue. The app captures your input in real time, adding context like timestamp and location—no typing required.

Field technicians often work in fast-paced environments where typing out detailed issue reports is impractical. In the past, issues like leaks, unusual vibrations, or strange noises were spotted but not always reported—either due to time constraints or a cumbersome reporting process. This led to delayed interventions and underreported defects, weakening the overall maintenance strategy.

Now, reporting is designed for the field—**hands-free, fast, and intuitive**. Whether you speak, snap a photo, or type a quick prompt, iMaintenance helps ensure that no critical issue goes unreported.

Detect Problems Before They Escalate

Sometimes issues build up silently—like small vibrations or gradual wear—that may not trigger alarms. With AI Detect:

- The system **learns normal equipment behavior**
- Flags **early deviations** (even if below alarm thresholds)
- Notifies the team before a failure occurs

For example, a compressor's vibration increases from 2 to 8 mm/s—below the 10 mm/s alarm level. The system detects this as abnormal and raises an alert. A reliability engineer investigates and replaces the bearing during planned downtime—**avoiding 10+ hours of unplanned shutdown**.

The Impact: Fewer Breakdowns, More Uptime

With faster issue creation and smarter detection:

- Preventive maintenance becomes proactive
- Equipment failures are caught early
- Downtime is reduced by **30–50%**

7.1. Create an Issue

This section explains how to create an issue using AI assistance, allowing you to report problems or incidents efficiently while receiving intelligent suggestions to capture relevant details accurately.

To create an issue:

1. In the **Issues** screen, tap the Create ![+] icon.
2. In the **Report Issue** screen, use the **Smart Input Assistant (SIA)** to describe the issue.

   You can choose any of the following options:

   ◦ **Capture an Image** using the Camera ![camera icon] icon — the system analyzes the image and suggests issue details.
   ◦ **Type** the issue details such as equipment, functional location, and severity directly into the AI text box.

   ◦ **Use Voice Input** by tapping the Mic ![mic icon] icon and speaking your description — SIA transcribes and interprets the input.

   These flexible options help you report issues quickly and accurately, even in high-pressure field conditions.

Figure 7-1 Report Issue
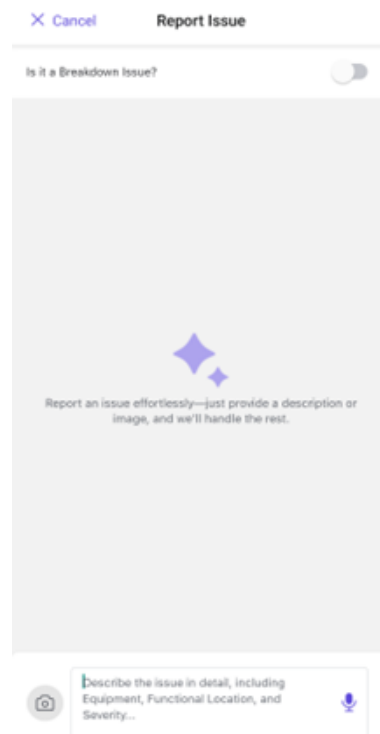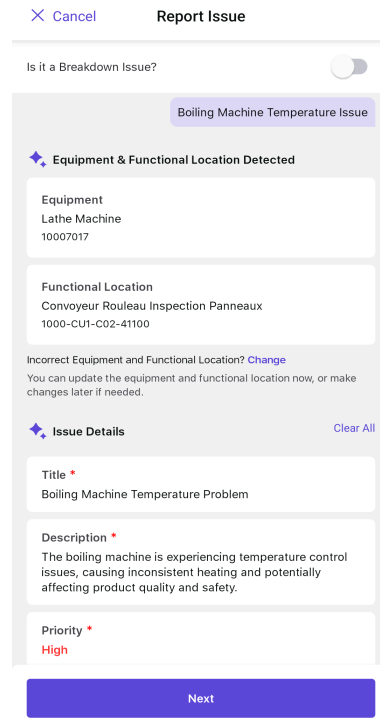
> ![note icon] **Note:**
> ◦ Switch **Is it a Breakdown Issue?** toggle on top if it is an emergency issue.

3. Tap the Enter icon next to the text box.

4. Select the **Equipment** and the **Functional Location** and click **Next**.

AI analyzes the provided details, retrieves the past asset information, and suggests relevant details based on historical data as follows:

Figure 7-2 Generated Issue Details

- **Equipment:** The machine or asset requiring 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 issue.
- **Description**: A detailed explanation of the issue.
- **User Status**: Tap to change the status of the issue—for example: **INIT**, **APPR**, **RJEC**, **CLSD**, and others.
- **Maintenance Plant**: Populates based on the selected Equipment or Functional Location.

- **Planning Plant and Planning Group**: Populate automatically based on the rules.
- **Code Group**: Displays the issue category (e.g., *Reactor*).
- **Code**: Shows the reason within the category (e.g., *Reactor Corrosion*).

> ✏️ **Note:**
> Code Group values load dynamically based on the selected Equipment (EQ), Functional Location (FL), or Issue Type.

- **Reported By**: Populates automatically with the logged-in user's full name.
- **Revision**: Select the relevant revision value:
  - **Apply with Date Changes**: Automatically updates the **Required Start Date** and **End Date**.
  - **Apply without Date Changes**: Keeps the original dates unchanged.
- **Priority:** The urgency of the issue.

> ✏️ **Note:**
> To change the Issue details, tap **Update Details**.

To change **Priority**:

a. Tap on **Priority**.

b. In the **Priority Determination** (risk assessment) screen, select the probability of occurrence of the scenario under each category.
   i. **People:** Helps you analyze the impact of the incident on people.
   ii. **Assets:** Helps you analyze the impact of the incident on the asset.
   iii. **Likelihood:** Probable occurrence of the scenario.
   iv. **Environmental:** Helps you analyze the impact of the incident on the environment.

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

The SIA automatically calculates the **Overall Priority** (Low, Medium, or High) based on the risk level identified for the above categories.

c. Tap **Done**.

Figure 7-3 Priority Details

> **Note:**
>
> You can also manually select the Priority value from the drop-down, instead of relying on the Risk Assessment Matrix for automated determination.

5. Tap **Create**.

Figure 7-4 Final Issue Details

If there are existing issues associated with the same equipment, a pop-up appears with the following options:

- **View Issues:** Select this to see existing issues.
- **Create Anyway:** Select this to create a new issue.
- **Cancel:** Select this to stop creating an issue.

> 📝 **Note:**
>
> This helps avoid duplicate reports. Earlier, the same issue was often logged more than once—like two technicians spotting the same oil leak at different times and both creating separate issues for it. This caused confusion for planners, added extra work, and sometimes led to the same problem being fixed twice.

The issue summary is displayed after selecting the Create Anyway option. In this screen, you can:

- Tap **More** > **Edit Issue** on the top-right corner to edit the issue details.

> 📝 **Note:**
> You can edit the issue until its status changes to Completed or Rejected.

- Tap **Show Equipment History** to view the equipment history details.
- Tap **Show Functional Location History** to view the functional location history details.

6. Add the following details:
    - Attachments
    - Items
    - Causes
    - Activities
    - Tasks
7. Tap **Report** to create or report the issue.

    A message, *Issue <issue title> has been reported successfully*, is displayed.

7.2. Delink Work Order from Follow-up Issue

You can remove the linked work order from a follow-up issue if it was associated incorrectly.

To delink an issue from a work order:

1. Navigate to the **Issues** screen.
2. Open the follow-up issue.
3. Tap the More icon on the right side.
4. Select **Delink from Work Order**.
5. Tap **Delink** in the confirmation pop-up.

    The associated work order is delinked from the follow-up issue and the Status is changed to **Released**.

7.3. Create an Issue from Existing One

When you're dealing with recurring problems—like similar equipment faults or location-specific issues—you don't have to start from scratch each time.

Use the **Duplicate** option to quickly copy an existing issue and create a new one with minor edits. This saves time, ensures consistency, and reduces repetitive data entry.

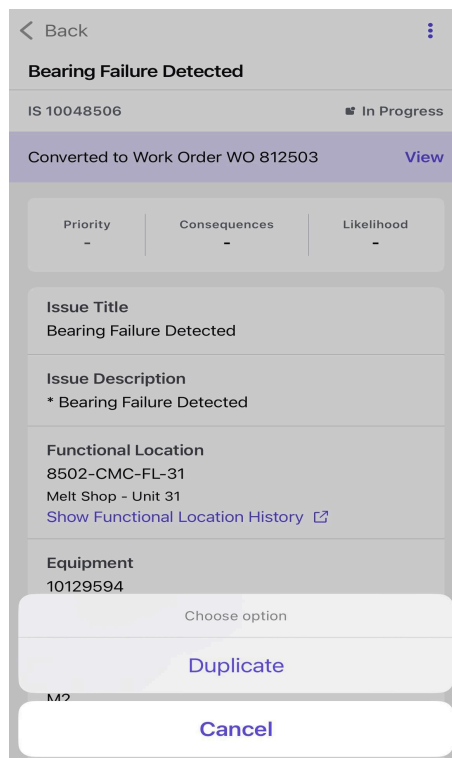To create an issue from an existing issue:

1. Open the issue you want to duplicate.
2. Tap the More

   icon on top-right.
3. In the **Choose Option** window, select **Duplicate**.

   Figure 7-5 Duplicate Issue

A new issue is created with the same details. Open the duplicated issue and make the necessary changes before saving.

Tip: Use this feature when logging issues that occur frequently on similar equipment or in the same functional location.

8. Execute a Work Order

Once a work order is assigned to you, complete all required tasks accurately and on time. Executing a work order involves inspecting the equipment, gathering spare parts or permits, performing the repair or maintenance, logging your progress, and finally marking the task as complete. Proper execution keeps equipment running smoothly and helps reduce unplanned downtime.

Get Step-by-Step Help with AI Assist

If you're unsure how to fix something, **AI Assist** is there to help. It looks at the work order details and provides suggestions based on similar past issues.

For example, If a pump shows abnormal vibration, AI Assist might suggest: *"Check valve X for blockage"* and guide you through each step of the fix.

Even if you're new on the job, you can complete tasks with more confidence and accuracy.

Why Timely Execution Matters

- **Improves Equipment Reliability** – Fixing problems on time reduces future breakdowns
- **Supports Accurate Records** – Logging your work helps supervisors verify tasks and track performance
- **Boosts First-Time Fix Rates** – AI support helps diagnose issues faster and get it right the first time

To execute a work order:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. In the **Work Order Details** tab, tap **Start Job**.

Figure 8-1 Start Job
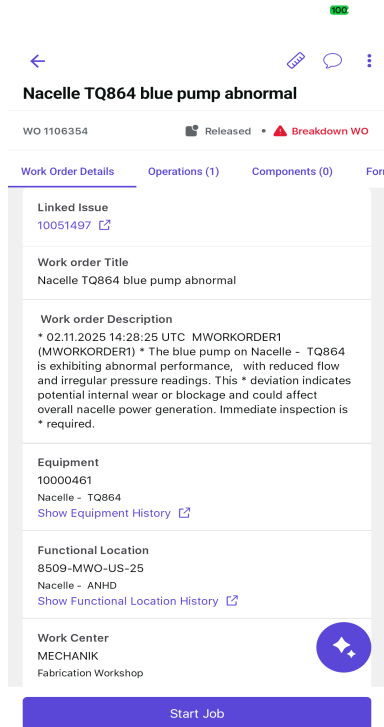
4. Complete the following work order tasks in sequence:
   ◦ Get Permits *(on page 81)*
   ◦ Collect Components *(on page 83)*
   ◦ Execute Operations *(on page 84)*
   ◦ Fill Forms *(on page 89)*
   ◦ Add Attachments *(on page 91)*

Available Actions During Execution:

- **Measuring Point** icon - View and add the measuring point details.

- **More** icon - Edit the work order, raise a breakdown work order, raise a follow-up issue, duplicate work order, or create a sub-work order.

- **Chat** icon - Message team members, share files, and use @mentions in real-time

Navigation Tabs:
- **Work Order Details** – View work order summary
- **Operations** – View assigned operations
- **Components** – View components list
- **Forms** – View and access work order and operation-specific forms
- **Attachments** – View work order- and operation-level attachments (organized in separate sections)

8.1. Get Permit for Equipment or Functional Location

Before starting work on specific equipment or in restricted areas, you must **request and acknowledge a safety permit**. The permit provides important safety instructions and task-specific precautions—ensuring you're not just cleared to work, but fully aware of how to do it safely.

Permits help:

- Prevent unsafe or unauthorized work
- Make you aware of hazards related to that equipment or area
- Reduce the risk of accidents, equipment damage, or shutdowns

For example, you're assigned to replace a valve in a pressurized line. When you open the permit, you see a note: *"Depressurize the system fully and lock the isolation valve before removal."* Without this step, you might have exposed yourself to high-pressure fluid or caused a system shutdown.

The permit gives you this heads-up *before* you start—keeping you and the system safe.

In iMaintenance, the permit process is fully digital and built into the **Execute Work Order** stage:

- You must review and acknowledge the permit before starting work
- Each acknowledgment is tracked and visible to supervisors
- This ensures safety steps are followed, compliance is met, and there's a reliable safety trail for every task

When safety is part of the workflow—not an afterthought—it protects everyone and keeps the job running smoothly.

To get permits:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap on the **Permits** tab.
4. Select the permit from the list.

Figure 8-2 Permits Screen
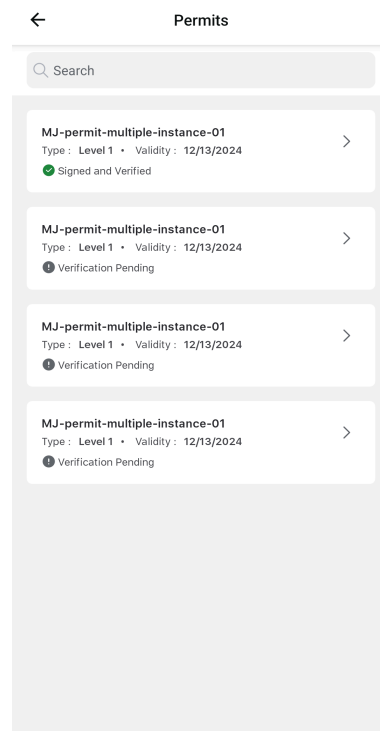
5. Tap **Add Signature**.
6. Add your signature and tap **Confirm**.
   You can view the status as **Signed and Verified**.

8.2. Collect Components

Before starting a task, ensure you have all the necessary components required for the operation. Once a Work Order is assigned, gather the required materials by scanning QR codes, checking stock availability, or collecting parts from the inventory. Having the right components prevents delays and ensures smoother execution of a work order.

To collect Components:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Components** tab.
   A list of components, including the associated material, is displayed.
4. Select or scan the QR code to collect the components from the Inventory or Kitting Area.

Figure 8-3 Components Screen
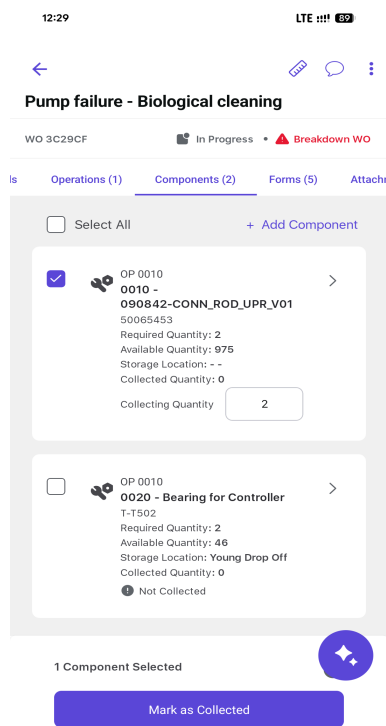
5. Once the required components are collected, tap **Mark as Collected** and tap **Confirm**. You can view the status as **Collected**, and the green check mark appears on the QR code.

8.3. Execute Operations

After collecting the required permits and components, begin execution of assigned operations. Once an operation is completed, confirm its completion by updating the system with relevant details such as start and end times, crew ID, and task summary.

To execute operations:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Operations** tab.
4. Select the operation from the list that is assigned to you.

   Tip: If you see an urgent unassigned operation you can help with, tap **Assign to me** to claim it, then **Start**

   On this screen, you can:
   ◦ View the operation number with description.
   ◦ Select the drop-down next to the operation number to switch between operations.
   ◦ Tap the More icon and select Measuring Point History to view the past measuring points history.
5. Tap **Start Operation**.

Figure 8-4 Start Operation

This action sets the status to **In Progress** and starts the auto timer.

What is the Auto Timer?

The auto timer tracks your wrench time—the actual time you spend working on the operation. Supervisors use this to compare planned vs. actual time, which improves scheduling accuracy and resource planning.

For example, if a task was planned for 1 hour but actually took 2, the system records that automatically. This helps your supervisor adjust future task durations or investigate delays if needed.

Need to Step Away?
- **Pause Work**: If you need to temporarily stop working—like waiting for tools or parts—tap **Pause**. This pauses the auto timer and updates the status to **On Hold**. Pausing makes sure only your active work time is counted.
- **Resume Work**: When you're ready to continue, tap **Resume Work**. The timer restarts, and the status switches back to **In Progress**.

> **Note:**
> If the auto timer is **disabled**, you'll need to **manually enter your work time** when submitting your timesheet.

6. Execute the operation by performing the assigned tasks.

7. Tap **End Operation** once the operation is completed.

Figure 8-5 End Operation

8. In the **End Operation** screen, review the following details and submit timesheet:
    a. **Technician**: Select technician from the list, if not automatically selected.
    b. **Data Entry Profile**: Select data entry profile from the list.
    c. **Actual Start Time**: Select Actual start date and time.
    d. **Actual End Time**: Select Actual end date and time.

e. **Total Duration**: Default

f. **Comments**: Add comments if any.

> ✏️ **Note:**
>
> If you are the last technician to complete the operation, select the **No Remaining Work** and **Final Confirmation** checkboxes. For more information, see Submit Timesheets *(on page 98)*.

g. Tap **Submit**.

Figure 8-6 Log Timesheet

A message, *Operation(s) <name> has been completed successfully*, is displayed.

If you attempt to start another operation without completing the current one, it prompts you to put the current operation on hold and proceed further.

> ✏️ **Note:**
>
> You can either confirm an operation without submitting a timesheet or submit a timesheet without confirming the operation.

8.3.1. Confirm Multiple Operations at Once

You can log time, confirm multiple operations at once, and edit details in the Bulk Confirmation flow. This intuitive inline approach minimizes navigation, simplifies the workflow, prevents errors, and accelerates confirmation activities

To confirm multiple operations at once:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Operations** tab.
4. Tap **Bulk Log** in the Operations section.
5. Choose **Select All** check box to select all the operations or select only required check boxes.
6. Tap **Log Time**.
7. In the **Log Time** screen,

   a. Expand each operation and fill in the following details:
      - Technician
      - Data Entry Profile
      - Actual Start Time
      - Actual End Time
      - Total Duration
      - Comments
      - No Work Remaining
      - Final Confirmation

   b. Tap **Mark as Completed**.

> **Note:**
> In this screen, you can,
> - Tap **Add New Log** to add multiple logs for the same operation.
> - Tap the **History** icon to view the history of previously confirmed operations.
> - Tap the **Copy** icon to copy the log and edit the details if required.
> - Tap the **Delete** icon to delete the log.

8.4. Capture Asset Data using Forms

During the execution of a Work Order, you may need to record additional details related to maintenance tasks using Forms. This could include readings, inspection results, equipment status updates, or notes on repairs performed. Capturing precise data ensures accurate documentation and helps in future troubleshooting.

To capture asset data in Forms:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Forms** tab.
4. The list of forms is displayed along with the form description and number.

   The form fields (such as Equipment, Functional Location, Plant, User Name, and so on) are automatically populated from the work order header details.

5. Select the form from the list.

   In the Form Details screen, you can,

   - View the form number with description.
   - Select the drop-down next to the form number to switch between forms.
   - Tap the More icon and select Issue History to view previously reported problems.

6. Fill in the form details, such as **Site Conducted**, **Conducted On**, **Start Date & Time**, **End Date & Time**, **Performed By**, and other required fields.

> **Note:**
> You can add attachments directly within the forms, and these are automatically included in the generated PDF upon form submission. The attachments are linked to the forms themselves and are not stored under the Work Order GOS/DMS.

As you complete the form:

- ◦ **Conditional logic** may show or hide sections/questions, request evidence, or raise issues based on your selections.
- ◦ **Instructional media** (images, videos, documents) appears inline where relevant to guide you through specific steps.
- ◦ **Numeric fields** display default values and units of measurement (UoM) when applicable.
- ◦ Formula fields (addition, subtraction, multiplication, division, etc.) calculate automatically. For example, if Field A + Field B = Field C, entering values in A and B instantly updates C.
- ◦ **Report issues** directly from any field or at the form level by tapping **Report Issue**.
- ◦ **View issue history** for the asset to see previously reported problems.

Figure 8-7 Fill Form Details

7. Tap **Submit**.

A message, *Form <name> has been submitted successfully*, is displayed.

> ✏️ **Note:**
> You cannot edit the form once it is submitted.

8. In the Success screen, you can,

- ◦ Tap **Convert to PDF** to view the form in PDF format, including images added in the Instructions type.
- ◦ Tap **Email** to share submitted digital forms via email.
- ◦ Tap **Print** to print the form straight from the mobile app.
- ◦ Tap **Go to Next Form** to navigate to the next form.
- ◦ Tap Close to navigate back to the forms list.

8.5. Add Attachments

Attach supporting files—photos, videos, PDFs, or voice recordings—to provide clear context on the maintenance or repair task. These files show the actual issue, document your work, and help supervisors review and close Work Orders faster.

Instead of writing "oil leak found," snap a photo of the leaking area and add a quick note explaining the location. Your supervisor can immediately assess the severity and dispatch the right team with the right parts—no back-and-forth needed.

This helps,

- • Reduce miscommunication
- • Improve first-time fix rates
- • Speed up supervisor approvals
- • Strengthen documentation for audits and compliance
- • Lower MTTR (Mean Time to Repair)

To add Attachments:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Attachments** tab.

Figure 8-8 Add Attachments
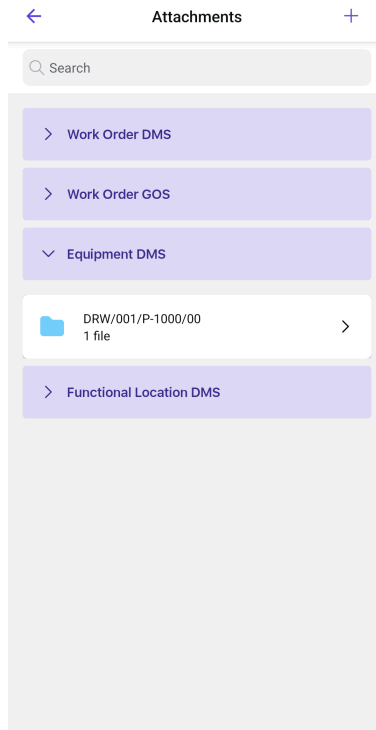
4. Tap the Add Attachment ✛ icon on the top right corner.
5. Select one of the following options from the pop-up:
   - Take Photo/Video: Capture a new photo or video.
   - Choose from Library: Select a photo or video from your device.
   - Record Voice Note: Tap the red button to record, then tap **Done**.
   - Upload Documents: Select a document from your device.

> ✏️ **Note:**
>
> Zoom in for details, zoom out for context, and reset anytime on PDFs and images.

6. Select the file destination (GOS, DMS, or SharePoint).

> ✏️ **Note:**
>
> The Work Order GOS section automatically expands whenever the images are added.

7. Tap **Save**.

8.6. Create a Follow-up Issue

During maintenance or repair work, you might come across additional problems that weren't part of the original work order.

Use the **Report Follow-up Issue** option to log these findings right away, so supervisors are notified and the issue can be tracked and fixed without delay.

For example, while replacing a pump motor, you notice that the nearby pipe has a small leak. Instead of writing it down to report later, you can log it as a follow-up issue on the spot. The supervisor is alerted immediately, and the issue stays open in the system until it's resolved.

Follow-up issues noted on paper or left to memory are easy to forget and could lead to serious breakdowns if not addressed in time.

By logging them in the system, you help catch and fix problems early—avoiding costly downtime, reducing the backlog, and making maintenance more proactive.

To create a follow-up issue:

1. Open the work order.

2. Tap the More [icon] icon in the top-right corner.

3. Select **Report Follow-up Issue**.

Figure 8-9 Raise Follow-up Issue
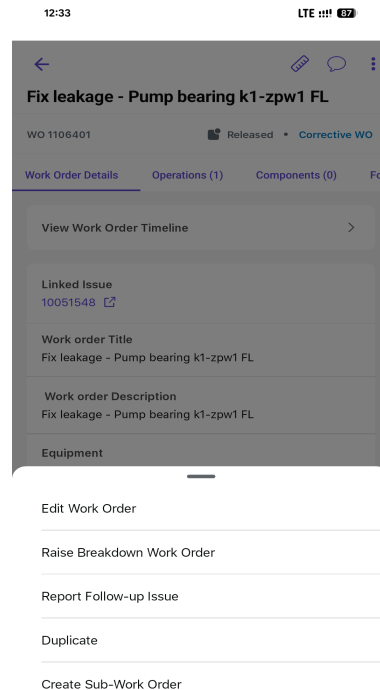
4. In the **Report Follow-up Issue** screen, add the issue details, such as equipment, functional location, and severity, in the AI Assistant text box. For more information, see Create an Issue *(on page 71)*.

View Follow-up Issues

Once you've created the follow-up issue:

1. Return to the Work Order Details screen.

2. Tap the **Follow-up Issues** section to view linked issues.

> [icon] **Note:**
> ◦ If there is **only one** follow-up issue, its details will open directly.
> ◦ If **no issues are linked**, the Follow-up Issues section will not be visible.

Delink a Follow-up Issue from the Work Order

If an issue has been incorrectly linked to a work order, you can remove (delink) it:

1. In the **Work Order Details** screen, tap **Follow-up Issues**.
2. Select the issue from the list that you want to remove.
3. Tap the More icon next to the issue.
4. Select **Delink from Work Order**.
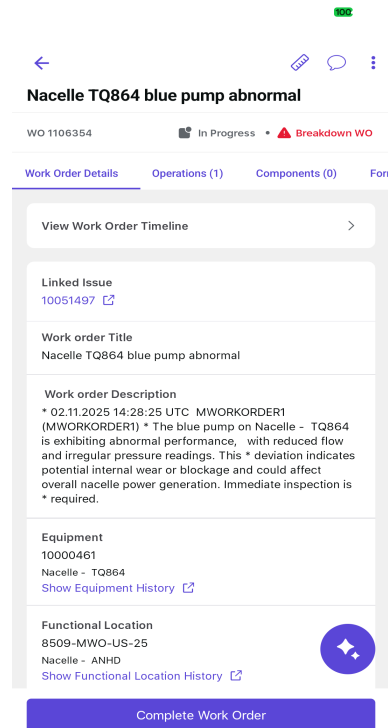5. In the confirmation pop-up, tap **Delink**.

8.7. Complete a Work Order

Once you finish the assigned operations, complete the work order.

To complete a work order:

1. Open the work order.

Figure 8-10 Complete Work Order

2. Tap **Complete Work Order**.

> ✏️ **Note:**
> An Alert message is displayed if there are any pending operations or tasks.

3. In the **Complete Work Order** screen, add a note and any other attachments such as DMS, GOS, images, videos, or PDFs, and tap **Complete**.

Figure 8-11 Add Note and Complete

A message, *Work Order <name> completed successfully*, is displayed, and the status is displayed as **Completed**.

9. Submit Timesheets

The Timesheets feature allows you to log and track the time spent on a specific operation. Once the operation is complete, you can record your time and submit the timesheet for supervisor approval.

You can submit a timesheet in two ways:

- **Partial Submission:** If multiple technicians are assigned to an operation, you can submit the timesheet partially by leaving the **No Remaining Work** and **Final Confirmation** checkboxes unchecked
- **Final Submission:** The last technician to complete the operation submits the timesheet with final confirmation by selecting both the **No Remaining Work** and **Final Confirmation** checkboxes.

To submit the timesheet, use one of the following methods:

1. Submit after completing the operation
   a. After completing the operation, review the details in the **End Operation** pop-up screen and tap **Submit**.

   > ✏️ **Note:**
   > If you are the last technician to complete the operation, select the **No Remaining Work** and **Final Confirmation** checkboxes during timesheet submission.

2. Submit later using the Timesheet module.
   a. Navigate to the **More** screen.
   b. Open the **Timesheet** module.
   c. Select the Operation.
   d. In the **Time Taken** field, update the time taken for the operation.
   e. In the **Comments** field, tap **Add Comments** to add comments.
   f. Tap **Submit**.

   > ✏️ **Note:**
   > If you are the last technician to complete the operation, select the **No Remaining Work** and **Final Confirmation** checkboxes during timesheet submission.

Re-submit Rejected Timesheet

If your timesheet entry was rejected by the supervisor—due to missing hours, incorrect task details, or other issues—you can revise and re-submit it with appropriate comments. This ensures your work hours are properly logged and approved without delay.

To re-submit the timesheet:

1. Navigate to the **More** screen.
2. Open the **Timesheet** module.
3. Select the rejected work log from the list.
4. Update or correct the details based on your supervisor's feedback.
5. Add a comment explaining the changes or providing clarification.
6. Tap **Resubmit**.

Figure 9-1 Resubmit Timesheet
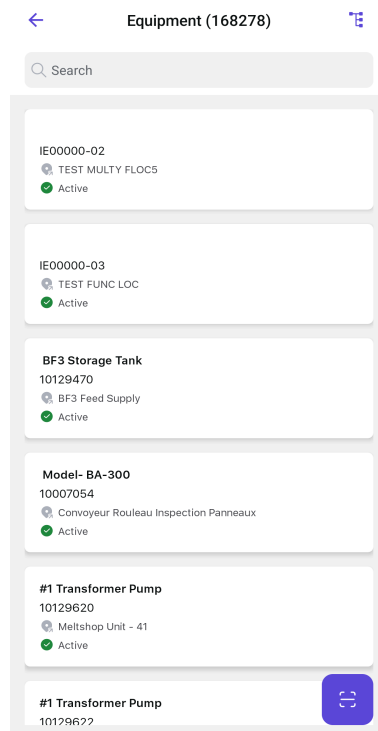
10. View Equipment Details

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 10-1 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 10-2 Equipment - Dashboard
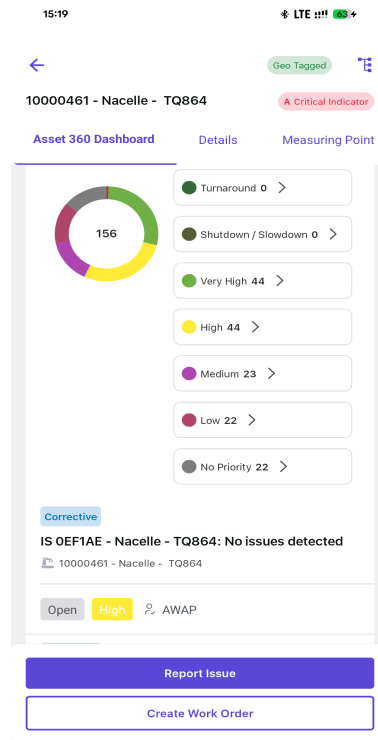
Details – Access Equipment Information

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 10-3 Equipment - Details
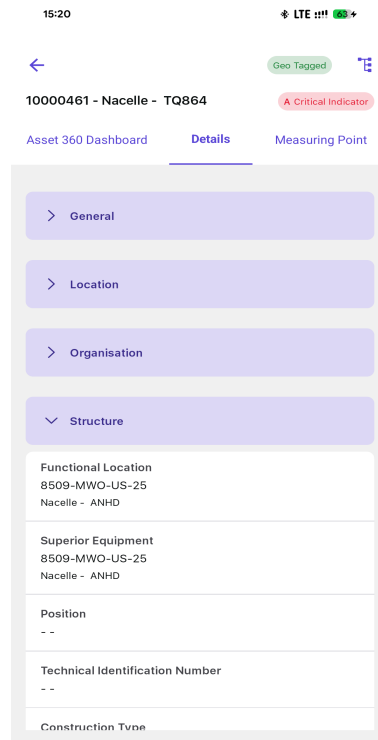
Measuring Point – Monitor Performance Metrics

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 104)*.

Figure 10-4 Equipment - Measuring Point
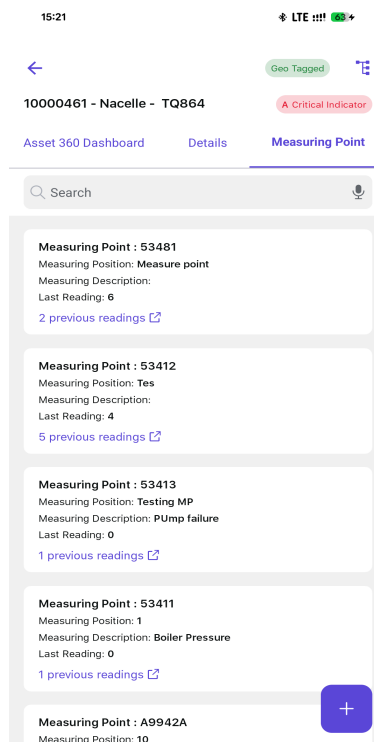
10.1. Create a Measuring Point

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.
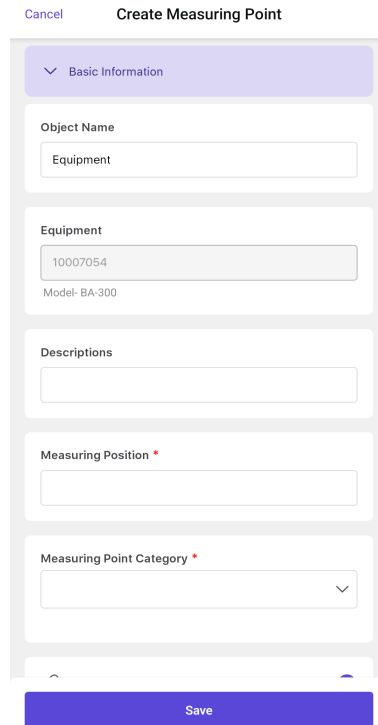
To create a measuring point:

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 10-5 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.

11. 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 11-1 Functional Location Details
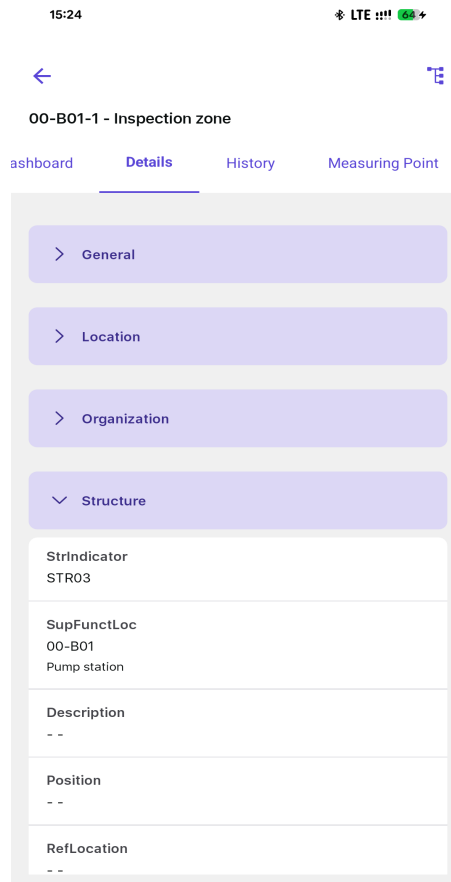
# Details – Access Functional Location Information

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 11-2 Functional Location - Details
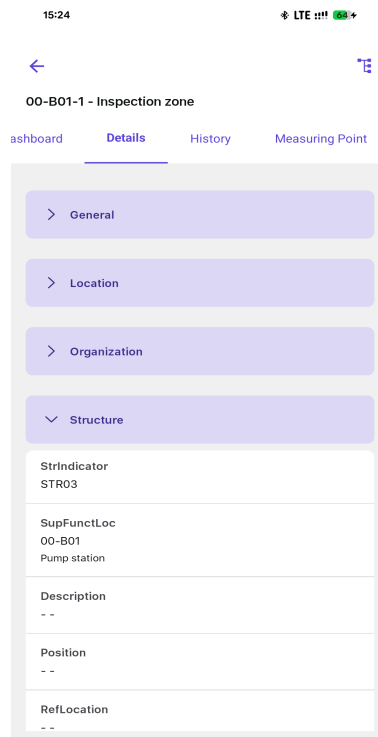
History – Track Equipment and Maintenance Records

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 .

Figure 11-3 Functional Location - Measuring Point

Figure 11-4 Measuring Points
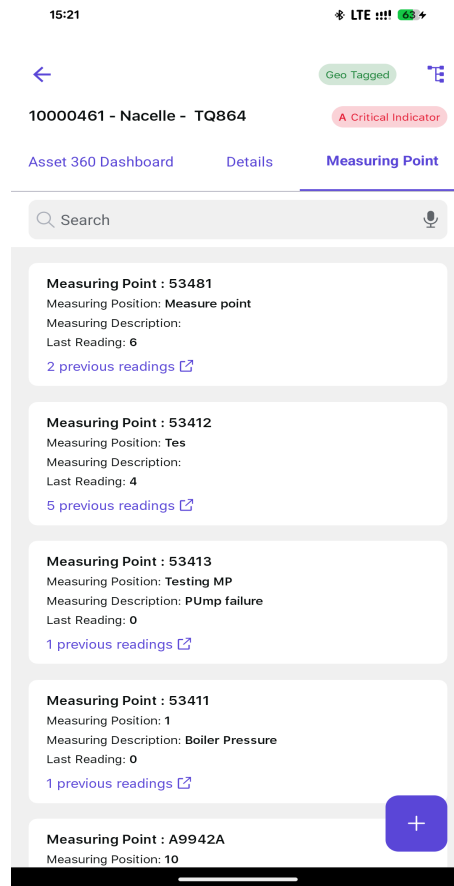
12. Personalize Your App with Theme and Language Options

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.
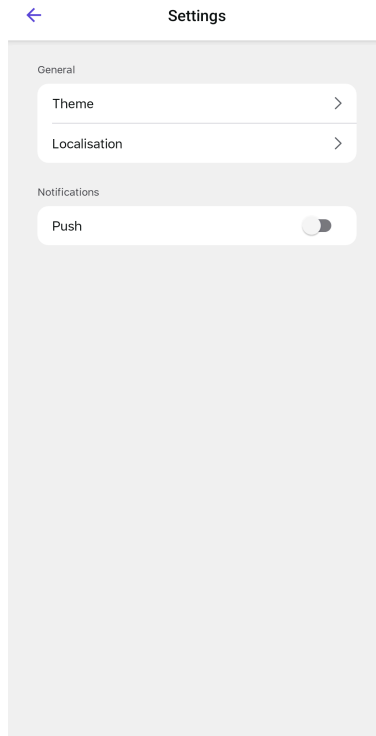
Switch between Dark and Light Modes

For optimal visibility, especially in different lighting conditions, you can switch between Dark and Light modes.
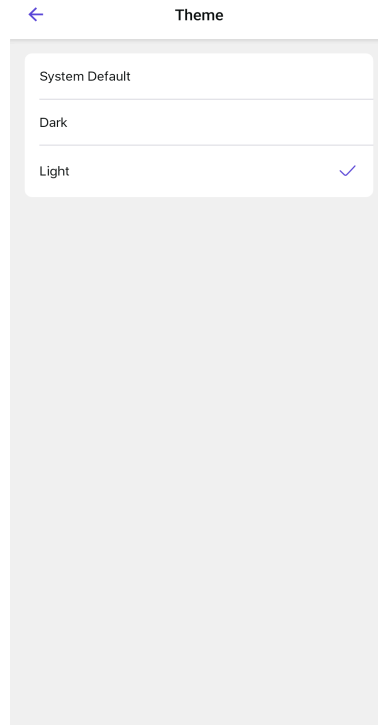
To change the mode or theme:

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

Figure 12-1 Settings Screen

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

Figure 12-2 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.
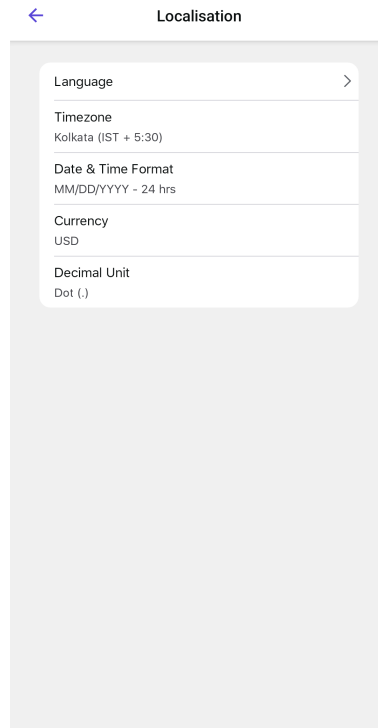
Choose Language

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 12-3 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.

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
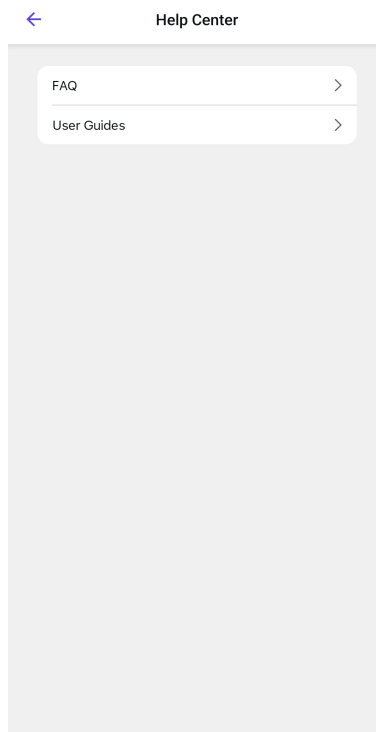
   The Help Center provides two main topics:
   - **FAQ** – Frequently Asked Questions related to different modules.
   - **User Guides** – Detailed guides on using various features.
2. Tap **FAQ** to view common questions and solutions.
   - Use the search bar at the top to find specific topics.
   - Browse 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:

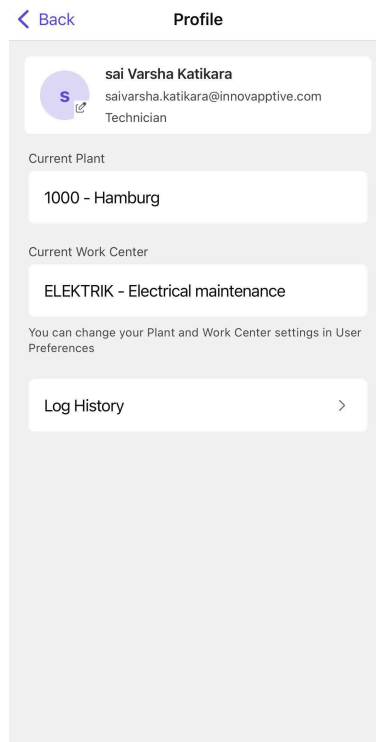Navigate to the **More** screen and tap on **Profile**.

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
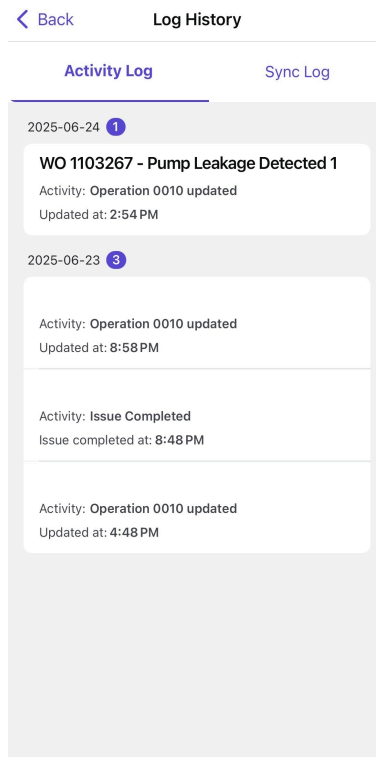
Sync Log

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