mRounds User Guide for Supervisors

Connected Worker Solutions

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

Release Version: *2512*

Release Date: *19 January 2026*

Published Date: *19 January 2026*

Document Version: *1.0*

Primary Author: Innovapptive Inc.

Preface

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

Intended Audience

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

Document Conventions

Table 0-1 Conventions followed in the document

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

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- Work Order Management
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1. Introduction to mRounds

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

This chapter has the following topics:

- Overview of mRounds *(on page 9)*
- mRounds Benefits for Operators & Supervisors *(on page 10)*
- System Requirements *(on page 37)*

1.1. Overview of mRounds

mRounds assists supervisors in creating operator rounds and supports operators in executing tasks, recording asset data, and submitting completed rounds. The application includes mobile and web versions, with the mobile app guiding operators in detecting failures early on to prevent equipment breakdown, while the web app helps planners create maintenance plans and assign tasks to operators, ultimately reducing downtime and repair costs.

The mRounds application includes both mobile and web applications.

mRounds Mobile App

The mRounds Mobile Application helps operators execute assigned tasks by following systematic steps, logging asset data, detecting any anomalies, and preventing equipment breakdowns.

For instance, when a round planner or supervisor assigns a task to an operator to inspect motor bearing friction twice a week, the operator goes to the equipment's location, checks it using specific checkpoints, records data like RPM and voltage, and submits a report through the mRounds mobile app. If any irregularities are detected, the operator promptly raises a notification for the equipment or location.

mRounds Web Application

The mRounds Web Application is your command center for managing maintenance operations efficiently, enables round planners or supervisors to create plans for monitoring and maintaining equipment or locations and assign these tasks to operators. These plans help reduce equipment downtime and minimize repair expenses.

Master Data & User Management Modules

The Master Configuration Module empowers administrators to add Plants, Shifts, Assets, Functional Locations, Units of Measurement, and Global Response Set Data.

Administrators can also include and oversee users, such as supervisors and operators.

1.2. mRounds Benefits for Operators & Supervisors

Using the **mRounds Mobile Application**, Operators can:

- **Task Management on the Go**: Operators can access and execute assigned rounds directly from their mobile devices, enabling real-time updates from the field.
- **Easy Data Entry with Response Types**: The mobile app supports multiple response types (e.g., Scan, Geo Location, Text Answer, Signature), making it easy for operators to input accurate data efficiently.
- **Real-Time Task Updates**: Operators can log data, report issues, and update task statuses in real-time, providing supervisors with immediate insights into task progress.
- **Offline Functionality**: The mobile app works in offline mode, allowing operators to complete rounds and log data even without internet connectivity. Once back online, data is synced automatically.
- **Streamlined Communication with Supervisors**: Operators can easily communicate task progress, report equipment issues, and provide updates, ensuring that any potential problems are quickly addressed.
- **Self-Assign and Unassign Rounds**: Operators have the flexibility to self-assign rounds and un-assign tasks when necessary, improving task ownership and team coordination.
- **Improved Equipment and Asset Tracking**: Operators can scan equipment and input data on the go, ensuring that all equipment checks are recorded accurately for future reference.
- **Immediate Issue Reporting**: Operators can create and log issues instantly when they notice equipment failures or anomalies, ensuring that critical problems are addressed without delay.

- **Track and Document Shift Activities**: Operators can log their shift activities, providing a clear record of what tasks were completed during their shift, which aids in accountability and continuity.
- **User-Friendly Interface**: The mobile app has an intuitive interface that guides operators through rounds efficiently, minimizing the time spent on task navigation and data input.
- **Ad Hoc Rounds Generation Support**: Operators can initiate ad hoc rounds when unexpected inspections or equipment checks are needed, allowing flexibility in maintenance operations.
- **Digital Signatures for Compliance**: Operators can capture digital signatures when completing tasks, ensuring compliance with safety and operational procedures.

Using the **mRounds Web Application**, Supervisors can:

- **Centralized Control of Maintenance Operations**: Supervisors can manage, schedule, and track all rounds from a central location, ensuring efficient task delegation and monitoring.
- **Real-Time Monitoring and Insights**: Access live data from operator rounds and ongoing tasks, allowing supervisors to respond quickly to critical issues and equipment failures.
- **Efficient Round Planning and Scheduling**: Create, modify, and schedule rounds for operators, ensuring routine maintenance tasks are completed on time and preventing equipment breakdowns.
- **Comprehensive Reporting and Documentation**: Generate detailed reports of completed rounds, equipment inspections, and issue resolutions. These reports can be exported and shared as PDFs, aiding compliance and audit readiness.
- **Advanced Round Plan Templates**: Supervisors can create templates for standard operating procedures and recurring maintenance tasks, reducing the time required to set up new rounds.
- **Enhanced Collaboration with Operators**: Through shared data visibility, supervisors can coordinate more effectively with operators, ensuring that the most critical tasks are prioritized.

- **Improved Accountability**: The web app allows supervisors to assign tasks, track progress, and hold team members accountable for completing their responsibilities.
- **Data-Driven Decision Making**: Leverage data from rounds and maintenance operations to make informed decisions regarding equipment health, task prioritization, and resource allocation.
- **Customizable PDF Reports**: Supervisors can configure and generate customized reports with organizational branding, giving stakeholders a clear and professional overview of maintenance operations.
- **Shift Handover Reports**: Easily generate and accept shift handover reports, ensuring smooth transitions between shifts and maintaining continuity in operations.

1.3. What's New for Supervisors in mRounds

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

From streamlined work order oversight and improved task assignment to smarter notifications, stronger access controls, and enhanced planning tools, these updates are designed to give supervisors clearer visibility and tighter control. Supervisors can now monitor operations more effectively, ensure data accuracy, and leverage advanced functionality to drive team productivity and achieve smoother maintenance and asset management outcomes.

- New Features and Enhancements in Release 2512 *(on page 13)*
- New Features and Enhancements in Release 2510 *(on page 14)*
- New Features and Enhancements in Release 2508 *(on page 15)*
- Table 1-4: New Features and Enhancements in Release 2506 *(on page 15)*
- Table 1-5: New Features and Enhancements in Release 2504.02 *(on page 18)*
- New Features and Enhancements in Release 2503 *(on page 20)*
- New Features and Enhancements in Release 2501 SP01 *(on page 21)*
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- New Features and Enhancements in Release 2408 *(on page 22)*
- New Features and Enhancements in Release 2404 *(on page 24)*
- New Features and Enhancements in Release 2403 *(on page 26)*
- New Features and Enhancements in Release 2402 *(on page 27)*
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- New Features and Enhancements in Release 2312 *(on page 29)*
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- New Features and Enhancements in Release 2309 SP03 *(on page 30)*
- New Features and Enhancements in Release 2309 SP02 *(on page 31)*
- New Features and Enhancements in Release 2309 SP01 *(on page 32)*
- New Features and Enhancements in Release 2309 *(on page 33)*
- New Features and Enhancements in Release 2308 *(on page 34)*
- New Features and Enhancements in Release 2306 *(on page 34)*
- New Features and Enhancements in Release 2304 *(on page 35)*

New Features and Enhancements in Release 2512

Table 1-1 New Features and Enhancements in Release 2512

Plant-Level Custom Dashboards Supervisors can now create **custom dashboards per plant**, allowing each facility to configure its own widgets and defaults without affecting other plants. For more information, see Custom Dashboard *(on page 51)*.
Unit of Measure for Slider Responses Users can now assign a Unit of Measure (UOM) to slider response types in round plans. For more information, see Slider *(on page 86)*
Version History for Round Plans & Templates Round plans and templates now support full version history, allowing users to view, compare, and restore previous configurations with automatic versioning on every save. For more information, see Modify Round Plans *(on page 115)* and Edit Round Templates *(on page 175)*.
Extended Lifecycle for Ad-Hoc Rounds Ad-hoc rounds now **remain active across multiple shifts** until submitted or the due date passes, ensuring continuity for long-running tasks. For more information, see Create an Ad-Hoc Round *(on page 116)*

Table 1-1 New Features and Enhancements in Release 2512 (continued)

Task-Level Buffer Configuration Users can now configure buffer time at the task level, enabling more precise scheduling and better time management for complex procedures. For more information, see Schedule Rounds at Task Level *(on page 129)*

New Features and Enhancements in Release 2510

Table 1-2 New Features and Enhancements in Release 2510

Operations Control Center Dashboard The Operation Control Center (OCC) now includes a Kanban dashboard to provide a consolidated view of daily operations in one place. Supervisors can see the status of Actions and Issues by columns (Open, In-Progress, Resolved), monitor shift progress, identify exceptions, reassign work where needed, and track items through to closure in real time. For more information, see Operations Control Center Dashboard *(on page 67)*.
Auto-Fill Asset and Location Details from SAP/ERP Asset and location details are now auto-filled during round planning, reducing manual lookups and data entry for supervisors.
Move Tasks Between Round Plans Allows you to move tasks between round plans without recreating them, retaining the same task ID when tasks are moved. For more information, see Import Round Plans from Template *(on page 113)*.
Real-Time Sync to SQL Server for Reporting Sync Issues and Actions data directly to your SQL Server via ODBC, so existing reports and dashboards always use up-to-date field operations data without manual exports.

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

Smart Error Handling for SAP and Enablon Integrations Get instant alerts when SAP or Enablon integrations fail, with clear error details and automatic retries based on configured rules. All sync issues are logged and notified to admins, that helps to resolve the integration problems faster and reduce data sync delays.
Planned Maintenance Notifications See clear messages during system maintenance that indicate temporary unavailability and expected restoration time, so supervisors understand when service will resume and don't mistake planned downtime for system issues.

New Features and Enhancements in Release 2508

Table 1-3 New Features and Enhancements in Release 2508

Search and Add Picklist Values Users can now search for required picklist values while creating tasks, saving time and improving accuracy. For more information, see Global Picklist *(on page 92)*.
Automated Email Scheduling for Dashboards Recurring email jobs can now be scheduled for both Custom and Out-of-the-Box (OOTB) dashboards, ensuring the timely delivery of insights. For more information, see Share Dashboard Data as PDF Reports *(on page 66)*.

New Features and Enhancements in Release 2505

Table 1-4 New Features and Enhancements in Release 2506

Import Tasks Instead of Re-Typing

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

When creating a new Round Plan, you can now reuse tasks, sections, or even entire pages from older plans. This saves time, avoids duplication, and ensures inspection content stays consistent across teams. It also reduces errors since you're pulling from already validated material instead of starting fresh every time. For more information, see Import Round Plans from Template *(on page 113)*.
Selective Barcode Scanning You can now make barcode scanning mandatory only for specific Round Plans. This gives flexibility—critical assets can still require scanning for compliance and traceability, while routine or low-risk rounds can be completed faster without it. The result is a balance between speed and accuracy in day-to-day operations. For more information, see Create a Round Plan and Publish *(on page 99)*.
Bulk Upload / Export via Excel You can now upload or export multiple Round Plans and templates at once using a structured Excel file. This makes it much easier to set up standard plans across sites, share templates for review, or make bulk edits without handling them one by one. It saves effort and ensures consistency when managing large volumes of plans. For more information, see Create a Round Plan and Publish *(on page 99)*.
Post Only the Differences For readings that keep adding up over time (like flow meters for water, gas, or electricity), the system can now send only the difference since the last entry to SAP. This avoids double counting, keeps SAP records clean, and reduces the need for manual corrections. For more information, see Number *(on page 77)*.
Live Exception Widget You can now spot problems early and act faster with a new widget that highlights abnormal readings of assets in real time. Whether it's unusual pressure, temperature, or other critical values, issues are flagged instantly instead of being buried inside long reports.

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

For more information, see Monitor Anomalies Using the Exceptions Dashboard *(on page 61)*.
Automate Email Scheduling Stay updated effortlessly with scheduled email delivery of both Custom and Out-of-the-Box (OOTB) dashboards. Insights now arrive automatically in your inbox, reducing manual effort and ensuring timely reporting. For more information, see Share Dashboard Data as PDF Reports *(on page 66)*.
Export Round Data to SQL Without Tags, With History You can now send round data to SQL Server even if no tags are set up. Historical records can also be included, so you get both current and past data for analysis. This makes it easier to build reports, track long-term trends, and connect with BI tools.
View Historical Readings on Charts and Spot Trends Charts now show how readings have changed over time, making it easier to see patterns in equipment performance. For example, you can track if a pressure reading is slowly rising, or if a temperature value is dropping more often than expected. These insights help you take action early, plan preventive maintenance, and avoid sudden failures. For more information, see Create Custom Widgets *(on page 53)*.
Smarter Decimal Handling Entering numbers is now easier and less error-prone. You can use either a dot (.) or a comma (,) as the decimal separator, depending on your regional style, and the system will automatically handle it correctly. This helps global teams avoid mistakes and ensures all data is stored in a consistent format. For more information, see Number *(on page 77)*.
Track Task Execution with Map Visualization and Geo-Compliance Scoring

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

The system now offers advanced location intelligence by automatically capturing task locations, visualizing them on an interactive map, and calculating geo-compliance scores based on predefined geofences. This ensures tasks are executed in the correct locations, helping verify field activity and reduce discrepancies. For more information, see View Round Plans and Submitted Rounds *(on page 134)*.
Convert Existing Rounds into Digital Round Plans You can now convert existing Rounds from PDF, Excel, or Word files into CWP-compatible digital Round Plans. By uploading documents and providing prompts, the system automatically generates structured Round Plans, reducing manual setup and ensuring consistency across operations. For more information, see Create Round Plan Template using AI *(on page 174)*.

New Features and Enhancements in Release 2504.02

Table 1-5 New Features and Enhancements in Release 2504.02

Deeper Insight into Operator and Team-Level Inspection Activity The Operator Productivity Dashboard now offers improved drill-downs and performance segmentation. Supervisors can track round completion, overdue inspections, and compliance across individual operators and defined groups—like shifts, locations, or departments—enabling clearer, more actionable performance management. For more information, see Operator Productivity Dashboard *(on page 63)*.
Review Inspection Submissions and Take Action—All in One View Supervisors can now interactively review submitted rounds within the system, without exporting data. This allows faster identification of incomplete inspections, missed scans, or abnormal readings—and enables corrective action right from the review screen. For more information, see Configure Round Plan Details *(on page 117)*.
Custom Configuration for Consistent and Relevant Shift Transitions

Table 1-5 New Features and Enhancements in Release 2504.02 (continued)

Supervisors can now configure Shift Handover Report formats based on specific plant requirements. With flexible field settings and formats, each site can tailor the shift handover process to local workflows—ensuring consistent and meaningful shift change documentation. For more information, see Create Shift Log Template *(on page 156)*.
Capture Visual Proof with Location and Time Accuracy Every image captured or uploaded during inspections is now automatically tagged with a timestamp and GPS coordinates. This enhancement ensures visual records are verifiable, audit-ready, and easy to retrieve based on when and where they were taken. For more information, see Create an Issue *(on page 139)*.
Instant Sync of Field Readings to SAP Supervisors can now push measurement readings captured during inspections directly to SAP through seamless API integration. This eliminates manual entry delays and ensures real-time data availability for faster decision-making. For more information, see Number *(on page 77)*.
Capture Plant-Specific Data and Trigger SAP Notifications Supervisors can now define custom fields in issue reports—complete with help text, default values, and auto-fill rules—to capture plant-specific inspection data. These fields are mapped to SAP notifications, ensuring seamless integration with backend processes. For more information, see Configure an Issue *(on page 137)*.
Targeted Insights for Product-Specific Inspection Analysis The Reports module now includes filters for plant-based product lines, allowing supervisors to isolate and analyze data specific to a product category. This helps identify trends, performance gaps, and improvement areas without wading through unrelated data. For more information, see Create Transactions Reports *(on page 56)*.

Table 1-5 New Features and Enhancements in Release 2504.02 (continued)

Quickly Refine and Focus Inspection Data Smart Filters on the Rounds screen help supervisors narrow down inspection records with ease. Whether you're tracking specific dates, statuses, or locations, the filters make it simple to locate what you need without delay. For more information, see Apply Filters to Refine Results *(on page 163)*.

New Features and Enhancements in Release 2503

Table 1-6 New Features and Enhancements in Release 2503

Automatic Cascading of Shift Notes and Standing Instructions Shift notes and standing instructions entered at the plant level now automatically cascade down to the unit and position levels. There's no need for manual copying or re-entry. Any local notes or instructions added at lower levels are preserved and shown alongside the plant-level information. For more information, see Generate and Handover Shift Handover Report *(on page 151)*.
Shift Logs with Conditional Logic You can now use Conditional Logic in your unit's Shift Log, which allows you to view and fill out Shift Logs that are specific to your assigned unit. This improvement helps keep things simple by showing only relevant information, making your logging experience more focused and avoiding confusion from other units. For more information, see Create Shift Log Template *(on page 156)*.
Operator Productivity Hub The new Operator Performance Dashboard gives you a complete view of operator performance, from round completions to issues raised. You can easily drill down and apply time-based filters to spot trends, identify gaps, or highlight top performers. Whether you're tracking compliance, pinpointing training needs, or celebrating high achievers, this dashboard provides all the insights you need, right at your fingertips.

Table 1-6 New Features and Enhancements in Release 2503 (continued)

For more information, see Operator Productivity Dashboard *(on page 63)*.

New Features and Enhancements in Release 2501 SP01

Table 1-7 New Features and Enhancements in Release 2501 SP01

Enhanced Exception Handling for Multiple-Choice & Global Picklist Responses Users can now track and manage exceptions more effectively in Round Plans and Templates. This update allows modifying response options, flagging critical deviations, and applying exceptions at the task level. Exceptions persist when copying, archiving, or restoring templates, ensuring consistency. Enhanced reporting provides insights by tracking exceptions across tasks, locations, and assets. For more information, see Create a Round Plan and Publish *(on page 99)*.
Real-Time SAP Sync for Live Issue Tracking mRounds now syncs SAP notifications in real time, allowing users to track issue statuses directly on Mobile and Web without needing separate SAP or mWorkOrder access. This update improves visibility, reduces system switching, and ensures faster response times, keeping maintenance teams aligned and efficient. For more information, see Track Ongoing Issues *(on page 140)*.

New Features and Enhancements in Release 2501

Table 1-8 New Features and Enhancements in Release 2501

Improved Shift Handover Management • **Rich Text Formatting**: Transform shift logs with rich text formatting capabilities, including bold, italics, and structured lists. • **Flexible Submission Windows**: Set custom time buffers for submitting Shift Handover Reports (SHR) before and after a shift ends. (SHR Improvement). For more information, see Create Shift Log Template *(on page 156)*.

Table 1-8 New Features and Enhancements in Release 2501 (continued)

Smarter Workflow Controls • **Advanced Conditional Logic**: Control the visibility of mandatory tasks, sections, and template-imported tasks using advanced logic, including "In Between" for precise numeric control, or "None" for empty selections without logic. For more information, see Conditional Logic *(on page 96)*.

New Features and Enhancements in Release 2408

Table 1-9 New Features and Enhancements in Release 2408

Comprehensive Rounds Compliance & Exception Reporting Easily create and review detailed Rounds Compliance & Exception Reports. These reports highlight deviations or delays in operational processes, helping teams ensure compliance and take timely corrective actions when needed. How it benefits: • **Enhanced Monitoring**: Identify issues or compliance gaps quickly. • **Actionable Insights**: Address delays or deviations through data-driven corrective actions, improving operational integrity. For more information, see Monitor in Real-Time and Share Reports *(on page 51)*.
Streamlined Issue Creation & Assignment in Web App Supervisors can now Create and Assign Issues Directly from the Web App, making it easier for supervisors to quickly document issues and assign them, ensuring that tasks are efficiently delegated and tracked to completion. How it benefits: • **Improved Workflow**: Supervisors can easily create and assign issues, reducing delays in task delegation. • **Enhanced Accountability**: Centralized issue tracking ensures problems are assigned to the right team members and followed through to resolution.

Table 1-9 New Features and Enhancements in Release 2408 (continued)

For more information, see Create an Issue *(on page 139)*.
Instant Issue Notifications for Faster Response With Instant Issue Notifications, any created issue is immediately converted into a notification and sent to operators, ensuring swift action. How it benefits: • **Reduced Response Time**: Operators receive real-time alerts, enabling them to address issues as soon as they arise. • **Minimized Downtime**: Faster notifications mean quicker issue resolution, keeping operations running smoothly. • **Enhanced Productivity**: By preventing workflow interruptions, operators can maintain high productivity. For more information, see Create an Issue *(on page 139)*.
Plant-Specific Filters in Master Data, Reports and Dashboard The Plant-Specific Filters feature allows operators to filter and view data, reports, and dashboards specific to individual plants within an organization. How it benefits: • **Enhanced Decision-Making**: Plant-specific filters enable managers and operators to make more informed decisions based on precise data from their specific operational unit, avoiding irrelevant information from other plants. • **Operational Focus**: Operators and staff can focus on their specific plant's performance, driving productivity improvements and targeted troubleshooting without distraction from other operational areas. For more information, see Custom Dashboard *(on page 51)*.
Unit-Based Data Filtering

Table 1-9 New Features and Enhancements in Release 2408 (continued)

Enhance data relevance with Unit-Based Data Filtering. This feature allows users to filter web application data based on assigned units, improving accessibility to the most pertinent information. How it benefits: • **Improved Efficiency**: Quickly find data specific to relevant units, reducing time spent sifting through unrelated information. • **Streamlined Access**: Provides more focused insights, leading to better decision-making. For more information, see About the Web Application Screens *(on page 41)*.

New Features and Enhancements in Release 2404

Table 1-10 New Features and Enhancements in Release 2404

Track Round Execution Duration Identify the duration of round execution. This helps users to optimize future rounds. For more information, see Operator Productivity Dashboard *(on page 63)*.
Setup Workflow Approval Configure workflow approval for round plan submissions and publishing. With proper workflows, technicians with the right skills will be able to review alerts, warnings or cautions. For more information, see Review and Approve Round Plans *(on page 118)*.
Maintain Buffer Period for Rounds Add a buffer period for rounds. This helps operators execute rounds even after their due time without the rounds being marked as overdue. For more information, see Schedule Round Plans by Frequency *(on page 124)*.
Add Exceptions for Minimum and Maximum Values

Table 1-10 New Features and Enhancements in Release 2404 (continued)

Add exceptions like Warning, Alert, Note, and so on for low and high range values while creating a round plan. This helps operators identify any hazardous condition of the equipment. For more information, see Number Range and Exceptions *(on page 80)*.
Copy Tasks across Multiple Assets Copy tasks in a round plan to multiple assets or locations with ease. This reduces repetitive work. For more information, see Create a Round Plan and Publish *(on page 99)*.
Add Multiple Lower and Upper Limits Configure multiple lower and upper limit range values and exceptions for numeric and slider responses while creating a round plan. For more information, see Number Range and Exceptions *(on page 80)*.
Track Round Execution Duration Identify the duration of round execution to optimize future rounds accordingly. For more information, see View Round Plans and Plan Details *(on page 133)*.
Enhanced "Custom Picklist" Response Type The "Custom Picklist" response type now displays "Allow More than One Selection", when values exceed two options. For more information, see Global Picklist *(on page 92)*.
Confirm Shift Handover When you click the Shift Handover button, an alert message, "Do you really want to start handover?" appears. For more information, see Overview of Shift Handover Reports *(on page 149)*.

New Features and Enhancements in Release 2403

Table 1-11 New Features and Enhancements in Release 2403

Create Round Plan Template • Create a Round Template with one page and multiple sections and tasks. • Edit the template sections and tasks. • Copy an existing template to quickly create new templates • Archive templates that are no longer required, or permanently delete them. • Restore the archived templates if required. For more information, see Create and Manage Round Templates *(on page 170)*.
Import Round Plans and Tasks Data Eliminate manual data recreation by exporting and importing Round Plans and Tasks data from one environment to another. For more information, see Import Round Plans from Template *(on page 113)*.
Round Plans are automatically updated with templates that are modified When a template is updated, associated Round Plans are automatically updated. This helps maintain consistency and accuracy across all plans. For more information, see Edit Round Templates *(on page 175)*.
Shift Handover Report Enhancements • Shift Handover Module is now governed by Access control. • Users can control the functionality of units within the application. • Generate Plant Level Shift Handover Reports (SHRs) when the SHR flag is enabled and the Unit flag is disabled. For more information, see Manage Shift Handover Authorization *(on page 159)*.
Bulk Upload Round Plans from Excel

Table 1-11 New Features and Enhancements in Release 2403 (continued)

Add multiple Round Plans with tasks from an Excel sheet. mRounds Round Plans screen displays success / failure status along with Round Plans total count. For more information, see Create a Round Plan and Publish *(on page 99)*.
Customize Shift Log Template Create, edit, and modify a customizable Shift Log Template for operators to easily record tasks, issues, and notes during their shifts. This ensures clear communication. For more information, see Create Shift Log Template *(on page 156)*.
Auto Sort Round Plans by latest When a round plan is published, the plan automatically sorts to the top of the list. You can immediately view the published plan. For more information, see Create a Round Plan and Publish *(on page 99)*.
Automatic Asset Name Updates in Round Plans When an asset name is changed after the creation of a round plan, the updated name is automatically updated in the round plan. For more information, see Create a Round Plan and Publish *(on page 99)*.
Auto-Populate "Reported By" Field The "Reported By" field in the SAP Notification screen auto-populates based on the user's login credentials. For more information, see Create ERP Notification for an Asset *(on page 147)*.

New Features and Enhancements in Release 2402

Table 1-12 New Features and Enhancements in Release 2402

SAP IAS Authentication Integration

Table 1-12 New Features and Enhancements in Release 2402 (continued)

mRounds application now seamlessly supports SAP IAS for enhanced user authentication. For more information, see Log in with SAP IDP *(on page 40)*.
View and Download Attachments for Rounds View and download attachments like audio, video and documents by clicking the links in the generated round details PDF to validate the evidence effectively. For more information, see View Round Plans and Plan Details *(on page 133)*.

New Features and Enhancements in Release 2401

Table 1-13 New Features and Enhancements in Release 2401

Acknowledge End User License Agreement Read and acknowledge End User License Agreement when logged into the application for the first time. For more information, see Standard Login *(on page 39)*.
Configure Mathematical Formulas for Fields Configure mathematical formulas for fields. These formulas help operators get accurate calculations and enter accurate data. For more information, see Number *(on page 77)*.
Create and Assign Actions to User Groups Create and assign actions to user groups in the web application. This allows any operator in those groups to pick up and execute those action. For more information, see Create an Action *(on page 143)*.
SAP IAS Authentication Integration mRounds application now seamlessly supports SAP IAS for enhanced user authentication.

Table 1-13 New Features and Enhancements in Release 2401 (continued)

For more information, see Log in with SAP IDP *(on page 40)*.

New Features and Enhancements in Release 2312

Table 1-14 New Features and Enhancements in Release 2312

Receive Instant Email Alerts • Receive instant emails when an issue or action is created, updated, resolved or closed. For more information, see Create and Manage Issues *(on page 137)*.
Specify Length of data to be entered in the fields Set specific field lengths while planning rounds. This helps prevent incorrect or incomplete data entry during round execution. For more information, see Understanding Response Types Used for Creating Round Tasks *(on page 71)*.
Create and Schedule Ad-Hoc Rounds Create ad-hoc rounds to address emergencies or any unforeseen situations. For more information, see Create an Ad-Hoc Round *(on page 116)*.

New Features and Enhancements in Release 2311

Table 1-15 New Features and Enhancements in Release 2311

Generate and Approve Shift Handover Report

Table 1-15 New Features and Enhancements in Release 2311 (continued)

• Create a shift handover report with essential information like observations, comments, and responsibilities for smooth communication and knowledge transfer during shift changes. • View, download, and share shift handover reports in PDF via email for effective knowledge transfer. • Review and approve the details, like observations, notes, comments, etc, in the Shift Handover Report and address any issues or concerns, if any, to facilitate effective communication. • This helps supervisors be aware of any ongoing issues, pending tasks, or significant changes. For more information, see Overview of Shift Handover Reports *(on page 149)*.
View and Download Attachments for Rounds View and download attachments like videos and documents by clicking the links in the generated round details PDF and validate the evidence. For more information, see View Round Plans and Plan Details *(on page 133)*.

New Features and Enhancements in Release 2309 SP03

Table 1-16 New Features and Enhancements in Release 2309 SP03

View historical data of Notifications of an Asset and a Location • Receive pop-up message while creating an issue for assets / locations that shows existing issues and lets you create new ones. • View the issue history or previously raised notifications to avoid creating duplicates. • Create a notification at any time, regardless of previous notifications raised. • View all past notifications, even after new ones are raised. For more information, see Create ERP Notification for an Asset *(on page 147)*.
Access Plant-Specific Rounds Assign plants to users and ensure secure control over the rounds.

Table 1-16 New Features and Enhancements in Release 2309 SP03 (continued)

For more information, see About the Web Application Screens *(on page 41)*.

New Features and Enhancements in Release 2309 SP02

Table 1-17 New Features and Enhancements in Release 2309 SP02

Monitor team activities Generate a team rounds / inspections report that provides an overview of all completed activities, identifies areas for improvement, and ensures task completion. For more information, see Monitor in Real-Time and Share Reports *(on page 51)*.
View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency. For more information, see Monitor in Real-Time and Share Reports *(on page 51)*.
Access detailed reports of supervisors' actions on the issues raised Administrators can access detailed reports of actions taken by supervisors on issues that are raised by operators. For more information, see Monitor in Real-Time and Share Reports *(on page 51)*.
Get a report for Overdue tasks Get a detailed report on overdue tasks. These reports help supervisors have a glance at overdue tasks and take appropriate action. For more information, see Monitor in Real-Time and Share Reports *(on page 51)*.

New Features and Enhancements in Release 2309 SP01

Table 1-18 New Features and Enhancements in Release 2309 SP01

View operator-specific Rounds Summary Reports View operator-specific Rounds Summary Reports. These reports help improve operational efficiency. For more information, see View Submitted Rounds *(on page 134)*.
Configure Widgets on the Dashboard screen Configure the dashboard widgets that you need and improve monitoring tasks. For more information, see Create Custom Widgets *(on page 53)*.
Configure the Task Compliance Report Configure Task Compliance Reports, download them with a click and submit them during audits. For more information, see Compliance Reports *(on page 60)*.
Query and retrieve a report on all exceptions or out-of-specifications Query for comprehensive reports on exceptions or out-of-specifications. This helps supervisors gain vital insights into round tasks and assets health. For more information, see Monitor Anomalies Using the Exceptions Dashboard *(on page 61)*.
Download widgets as PDF and export data in Excel format Download dashboard widgets as PDFs and export data in Excel format. Users can share these over email. For more information, see Create Custom Widgets *(on page 53)*.
Monitor, Improve, and Track Effectively with Comprehensive Rounds Report

Table 1-18 New Features and Enhancements in Release 2309 SP01 (continued)

Stay on top of team performance with comprehensive rounds reports. Supervisors can use these reports to monitor activities, pinpoint areas of improvement, and track tasks completion. For more information, see Monitor in Real-Time and Share Reports *(on page 51)*.

New Features and Enhancements in Release 2309

Table 1-19 New Features and Enhancements in Release 2309

Schedule Rounds based on task frequency for efficient maintenance Schedule Round Plans based on individual task frequencies. Form a comprehensive Master Plan for proactive asset maintenance and ensure precise, efficient equipment maintenance. For more information, see Schedule Rounds at Task Level *(on page 129)*.
Assign rounds to user groups Assign rounds to user groups when scheduling. Any user from the group will be able to pick up the round task and execute maintenance. For more information, see Schedule Round Plans *(on page 123)*.
Enable unlimited historical data capture for Number response type Enable / configure the Number response type to store up to 20 historical readings that help detect anomalies early using the data trends. For more information, see Number *(on page 77)*.
Add additional details for conditional logic Add mandate responses, define a number range, and specify unit of measurement options for tasks in conditional logic. For more information, see Conditional Logic *(on page 96)*.

Table 1-19 New Features and Enhancements in Release 2309 (continued)

Add additional notes, labels, values in the Task Details screen Add additional notes, labels, values in the Tasks Details screen to provide additional information to technicians and assist them to function more efficiently and effectively. For more information, see Create a Round Plan and Publish *(on page 99)*.

New Features and Enhancements in Release 2308

Table 1-20 New Features and Enhancements in Release 2308

Real-Time adaptation with the Skipped status in Rounds You can view the Skipped status, which indicates that an entire round is skipped with a reason. For more information, see About the Web Application Screens *(on page 41)*.
Add Additional Notes and Attachments to work on rounds effortlessly Add additional notes, safety instructions, and manuals as PDFs or images in the Round Plan Details screen to provide additional information to function more efficiently and effectively. For more information, see Create a Round Plan and Publish *(on page 99)*.

New Features and Enhancements in Release 2306

Table 1-21 New Features and Enhancements in Release 2306

Enhanced PDF Preview Setup • Highlighted important fields such as Description, Asset, Location, and Priority of Issues & Actions. • Enriched PDF Preview with Photo & PDF attachments alongside textual content. • Incorporate visual cues for skipped Tasks, Assets, Locations and barcodes with reason codes.

Table 1-21 New Features and Enhancements in Release 2306 (continued)

For more information, see Configure Round Plan Details PDF *(on page 117)*.
Assign rounds to plants based on shifts • Create shifts and Assign to Plant Operations. • Schedule rounds by shifts and split slots for improved flexibility and optimized work execution. For more information, see Schedule Round Plans *(on page 123)*.
Embrace Control Over Rounds • View/modify Shift, Start Date & time, Due Date & time, and Assignee for each round. • Add a notification message whenever the Shift, Date, or time is changed. For more information, see Schedule Round Plans *(on page 123)*.
Configure Numeric Response Type Enable the "History" checkbox to view the last 5 readings of the Number and Slider response types in the mobile app. For more information, see Create a Round Plan and Publish *(on page 99)*.

New Features and Enhancements in Release 2304

Table 1-22 New Features and Enhancements in Release 2304

Create, View, Edit, and Publish Round Plans • Create a round plan with multiple pages, sections, and tasks and publish. • Preview the round plan in the mRounds mobile application. • Configure the PDF view of the submitted rounds with Header, Subject, Footer, and Body Content. • View list of created round plans, edit them if required, and view plan meta details. • Edit a round plan to meet new requirements.

Table 1-22 New Features and Enhancements in Release 2304 (continued)

For more information, see Create a Round Plan and Publish *(on page 99)*.
Add Response Types and Conditional Logic to Questions Read Only Field, Text answer, Long Text Answer, Number, Number Range, Number with Unit of Measurement, Pop up message based on number range, Check box, Scan (with OCR), Date & Time, Date Range, Signature, Slider, Geo Location, Hyperlink, Instructions, Multiple Choice, Global Picklist, Conditional Logic response types can be added to tasks. For more information, see Create a Round Plan and Publish *(on page 99)*.
Schedule Round Plans • Schedule round plans by frequency, by data and assign them to operators. • View the list of scheduled and published round plans. • Modify scheduled round plans. • Select a round to view details like Operator, Status, Scheduled By, and so on. For more information, see Schedule Round Plans by Frequency *(on page 124)*.
Track progress of Scheduled Rounds • View Open, To-Do, In-progress, and Submitted rounds. • Download PDF reports of in-progress and Submitted rounds. For more information, see View Submitted Rounds *(on page 134)*.
Archive, Restore or Delete Round Plans • Archive authored round plans which are no longer required. • Restore the round plan when required. • Permanently delete the round plans. For more information, see Archive, Restore, and Delete Round Plans *(on page 168)*.
Track progress of Open Issues and Actions

Table 1-22 New Features and Enhancements in Release 2304 (continued)

• View charts of open issues and actions. • View list of Open issues and actions created by operators. • Create a Notification for an asset and sync it with backend ERP systems instantly. For more information, see Create and Manage Issues *(on page 137)*.
Search & Filter • Search & Filter round plans. • Search & Filter rounds. • Search & Filter Archived round plans. • Search, Filter, and view open issues and actions. For more information, see Locate Rounds, Issues, and Actions *(on page 162)*.
Productivity Enhancements • Create a new round plan instantly by copying the existing one. • Create a route to a round plan for operators to quickly navigate from one asset to another. For more information, see Create a Round Plan and Publish *(on page 99)*.

1.4. System Requirements

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

System	Minimum Requirement
Compatible OS Platform and Version(s)	64-bit Windows and Macintosh
Compatible Form Factors	Desktop iOS - Tablets and Phones Android - Tablets and Phones

System	Minimum Requirement
Compatible Device(s)	iOS 16 (and above), iPad Air (2 and above), iPad (5th gen and above), and iPad Mini (4 and above) All iPad Pro models iPhone 10 and above and iPhone SE2 Android 12 Samsung, Google, One Plus, ECom and iSafe devices that support Android 12 and above
Compatible Browser(s)	Chrome (Best view), Firefox, and Microsoft Edge
Device Storage and Memory Requirements	**Windows** 8GB RAM and a 64-bit operating system with an x64-based processor are preferred **Macintosh** 8GB RAM & 64-bit operating system **Mobile** Android: 6GB RAM and above iOS: 4GB RAM and above

2. Log in to the Web Application

This section provides guidance on logging into the web application.

This section has the following topics:

- Standard Login *(on page 39)*
- Log in with SAP IDP *(on page 40)*

2.1. Standard Login

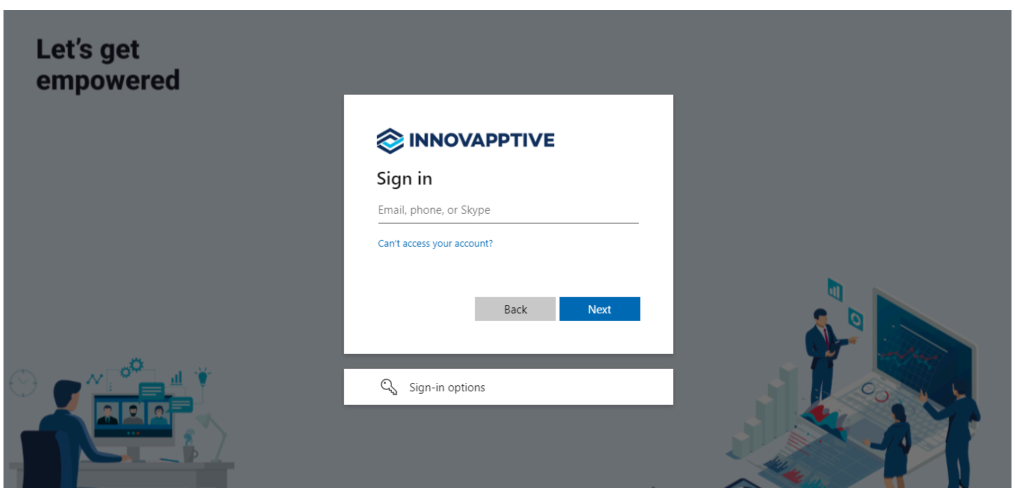
You can access the application through the URL and log in with your **User ID** and **Password**.

To log in to the Web Application:

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

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

Figure 2-1 Sign in Screen



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

The application takes you to the home screen.

2.2. Log in with SAP IDP

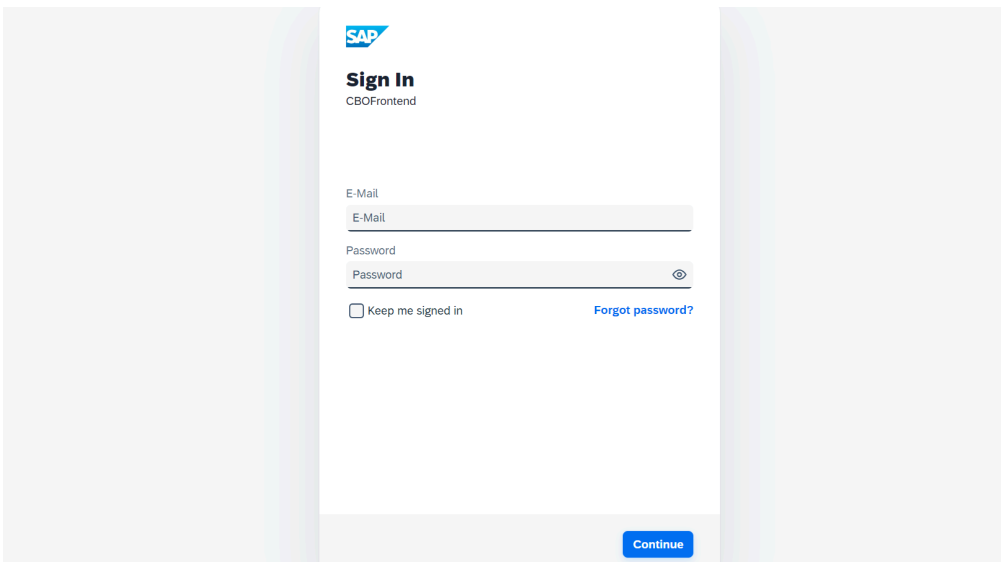
You can log into the web application using the SAP IDP.

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

To log in using SAP IDP:

1. Open the web application using the URL.

   Figure 2-2 Log in using SAP IDP

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

   The application displays the home screen.

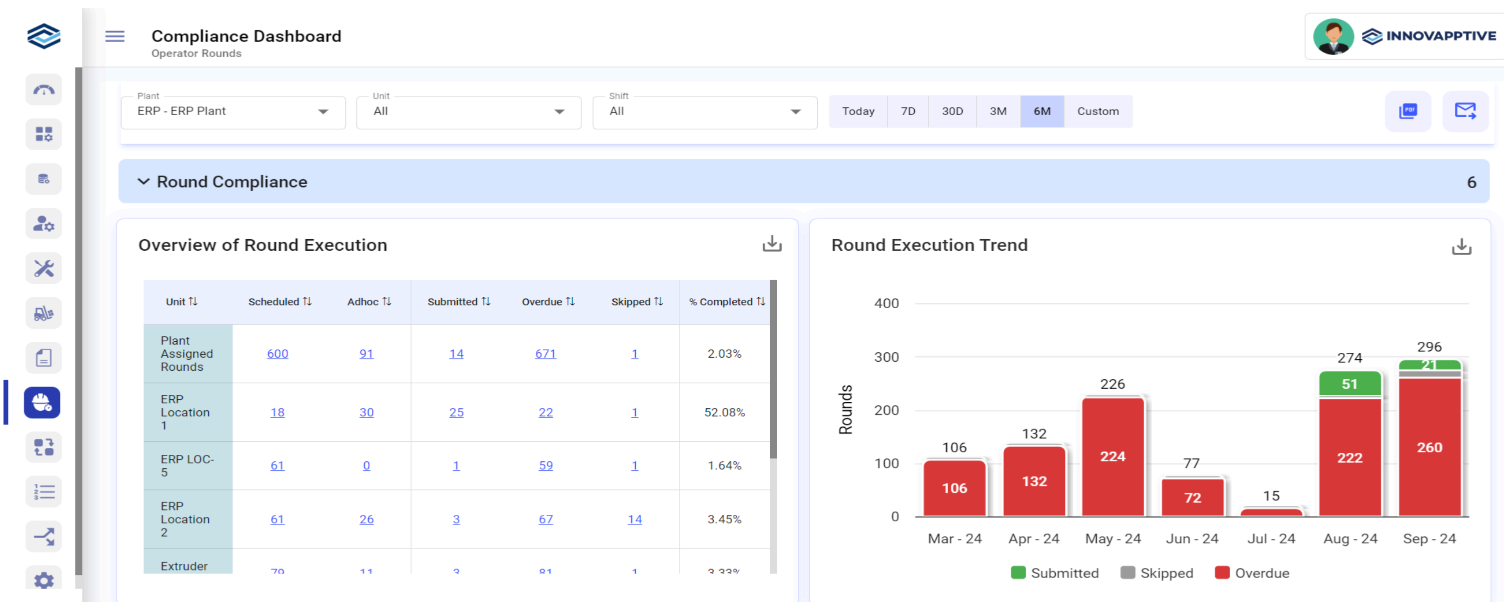
3. About the Web Application Screens

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

Compliance Dashboard

The **Compliance Dashboard** summarizes an operator's findings from their rounds, verifying adherence to operational procedures, schedules, and tasks, while confirming no significant issues are encountered. For more details, see Compliance Reports *(on page 60)*.

Figure 3-1 Compliance Dashboard

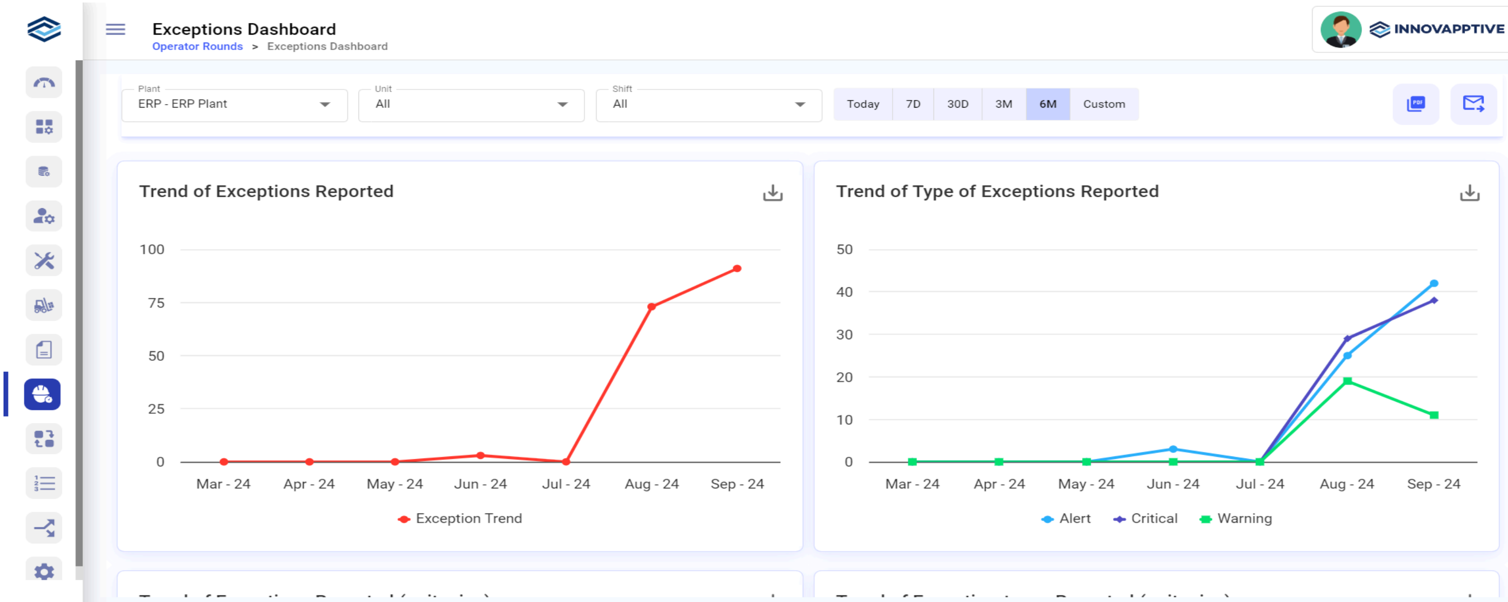


Unit	Scheduled	Adhoc	Submitted	Overdue	Skipped	% Completed
Plant Assigned Rounds	600	91	14	671	1	2.03%
ERP Location 1	18	30	25	22	1	52.08%
ERP LOC-5	61	0	1	59	1	1.64%
ERP Location 2	61	26	3	67	14	3.45%
Extruder						

Exceptions Dashboard

The **Exceptions Dashboard** summarizes deviations from standard procedures or unexpected findings during rounds, highlighting anomalies like faulty equipment, safety hazards, or missing data. It helps identify and manage issues that could impact operational efficiency, safety, or compliance. For more details, see Monitor Anomalies Using the Exceptions Dashboard *(on page 61)*.

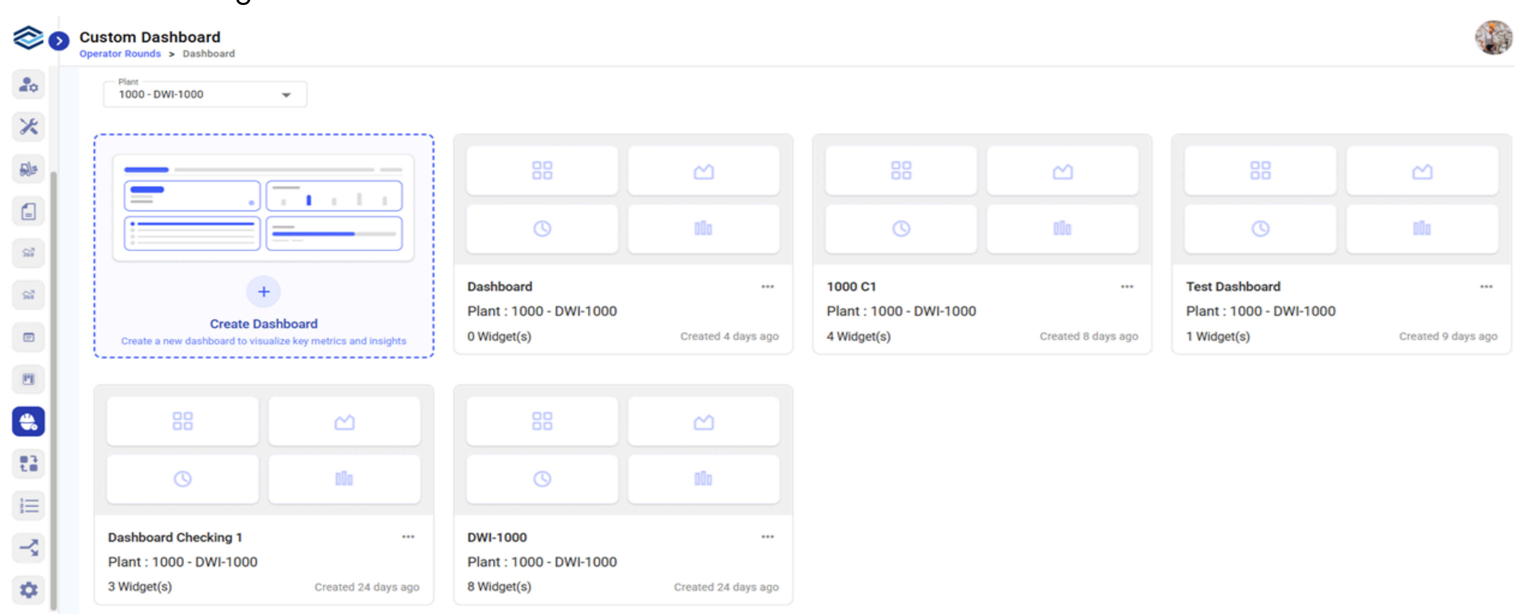
Figure 3-2 Exceptions Dashboard



Custom Dashboard

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

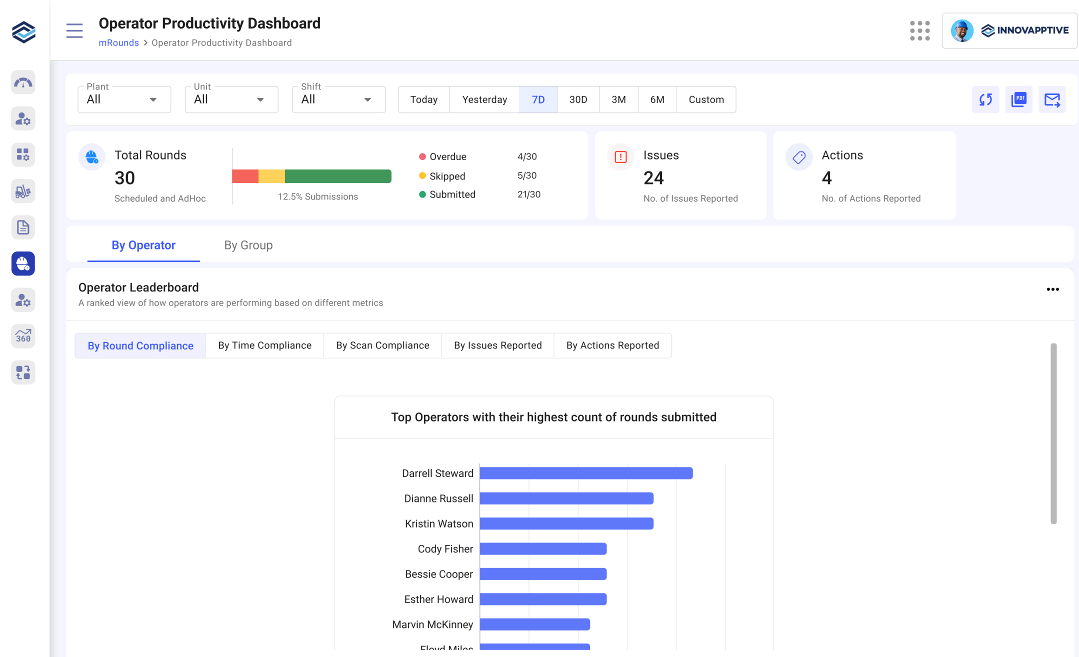
Figure 3-3 Custom Dashboard



Operator Productivity Dashboard

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

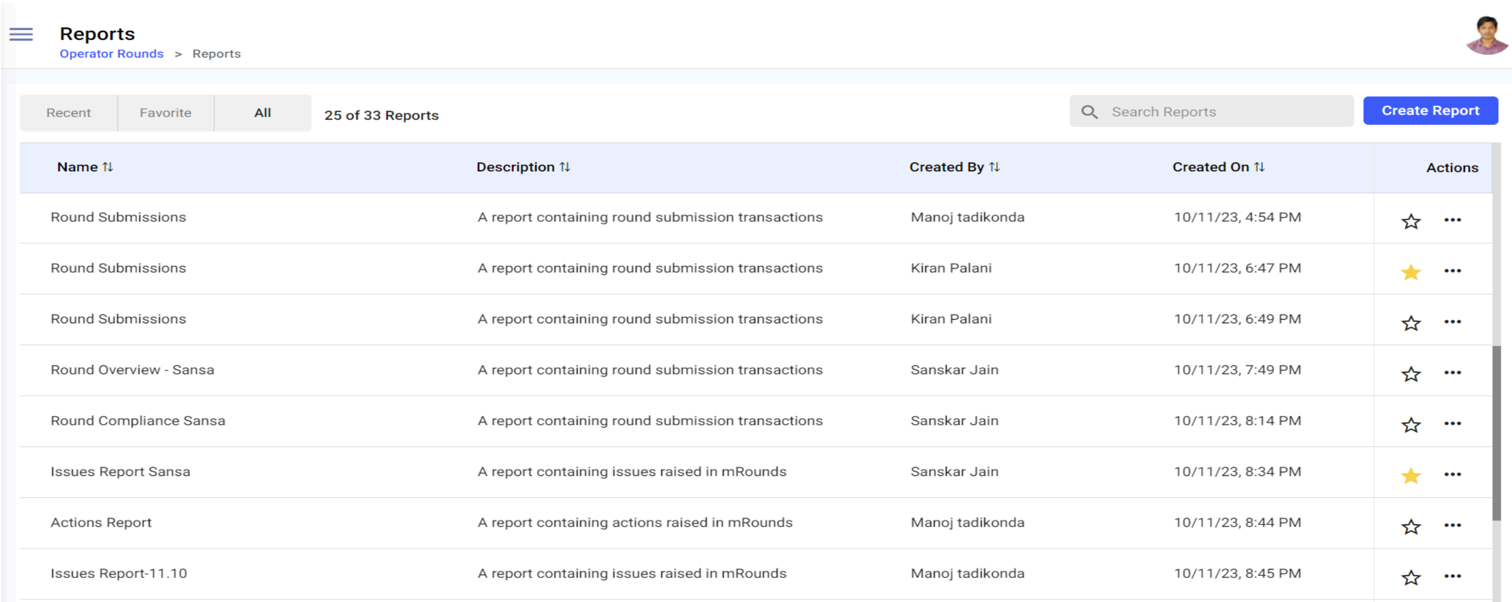
Figure 3-4 Operator Productivity Dashboard



Reports

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

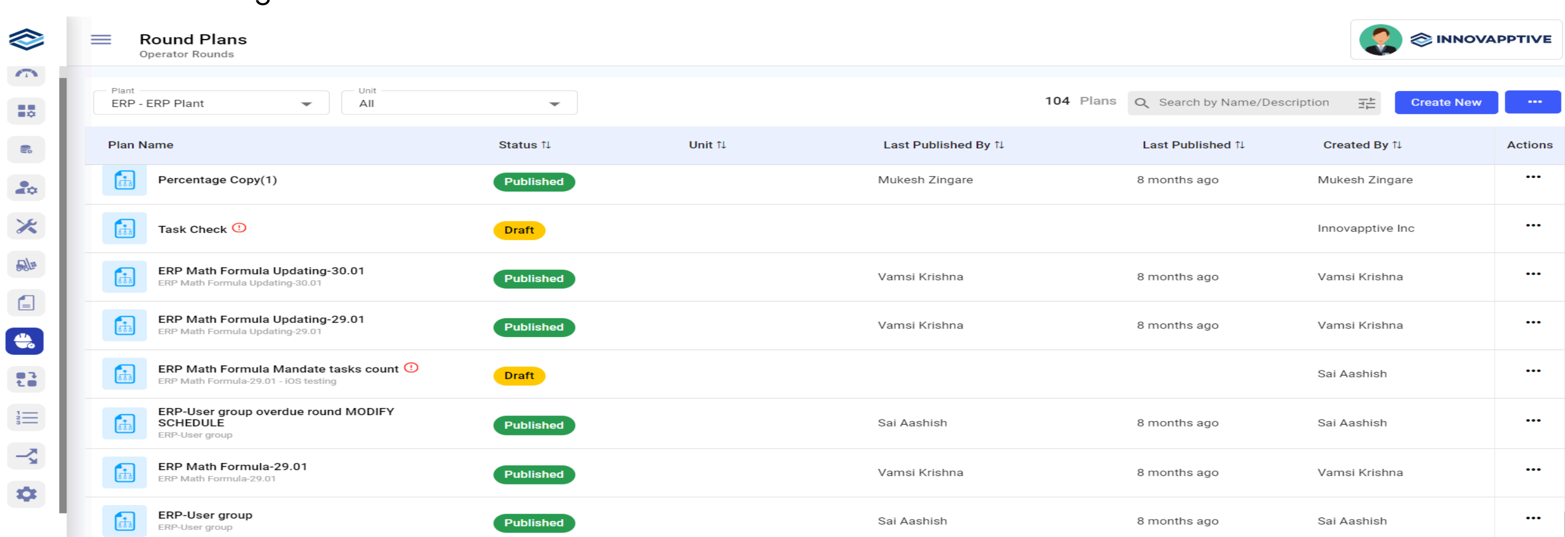
Figure 3-5 Reports



Round Plans

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

Figure 3-6 Round Plans Screen

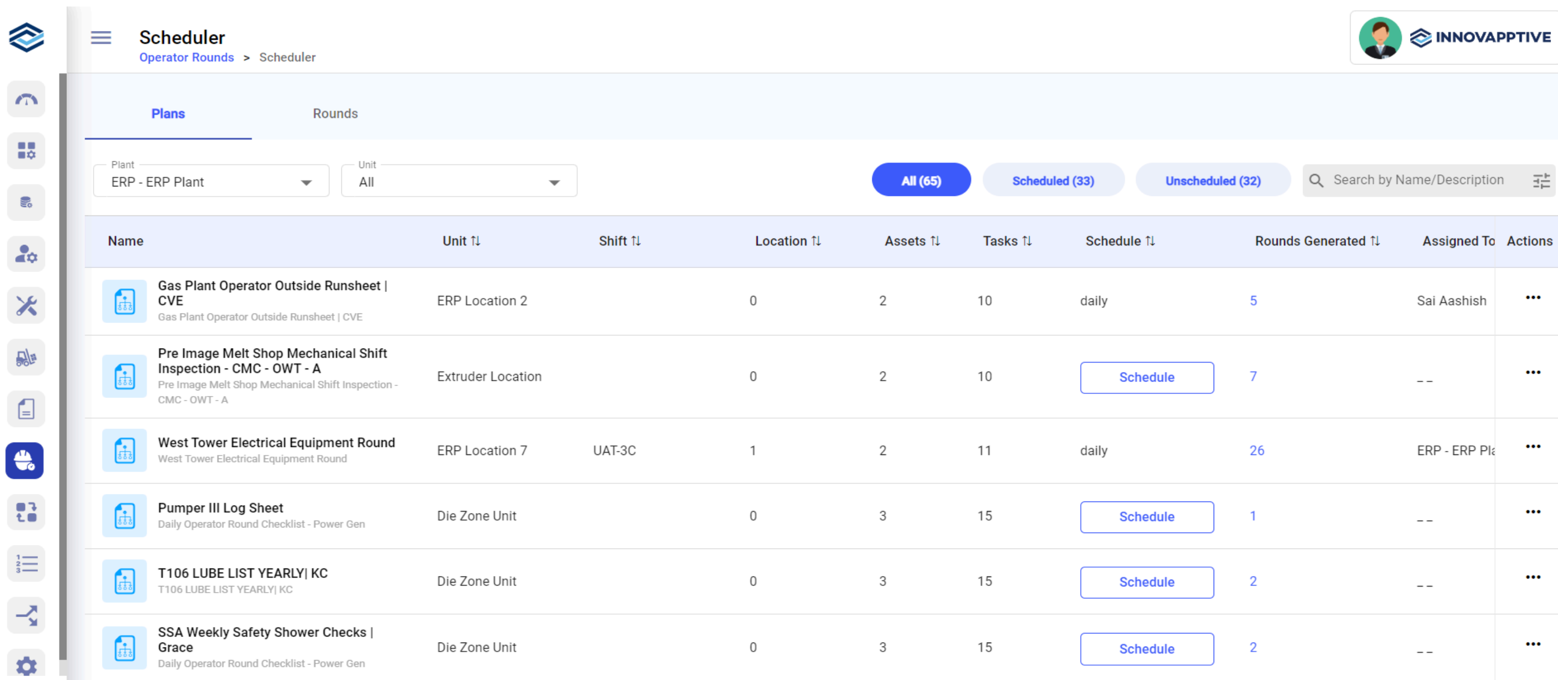


Scheduler

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

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

Figure 3-7 Scheduler Screen

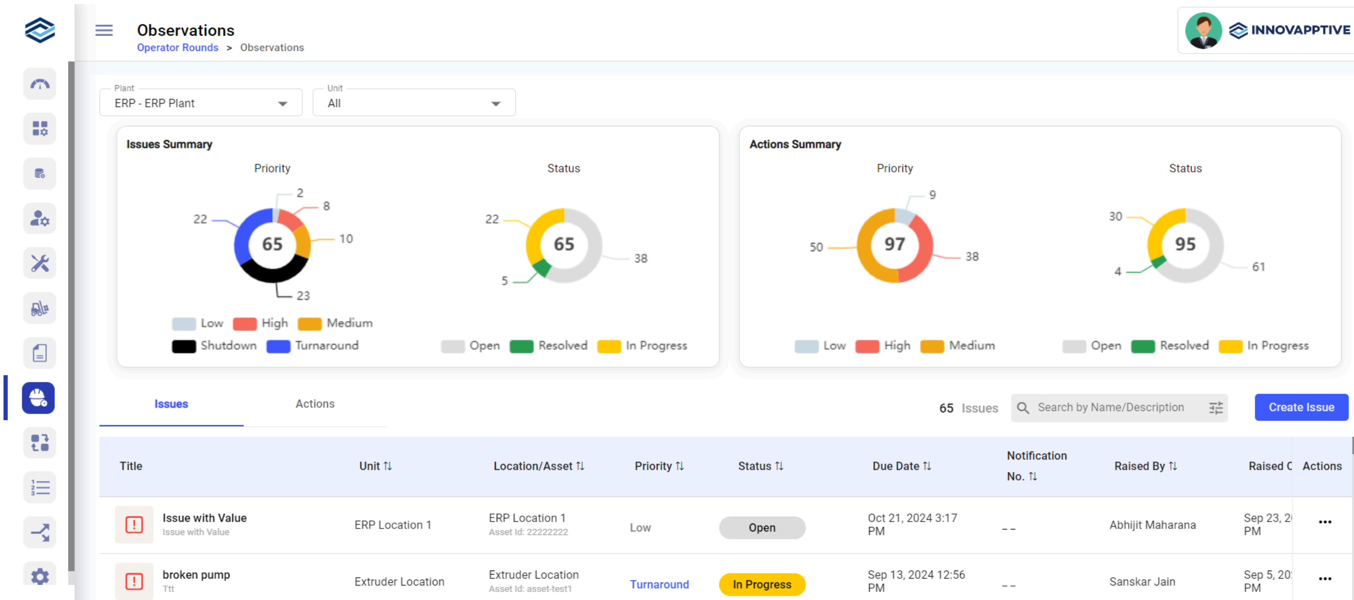


Observations

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

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

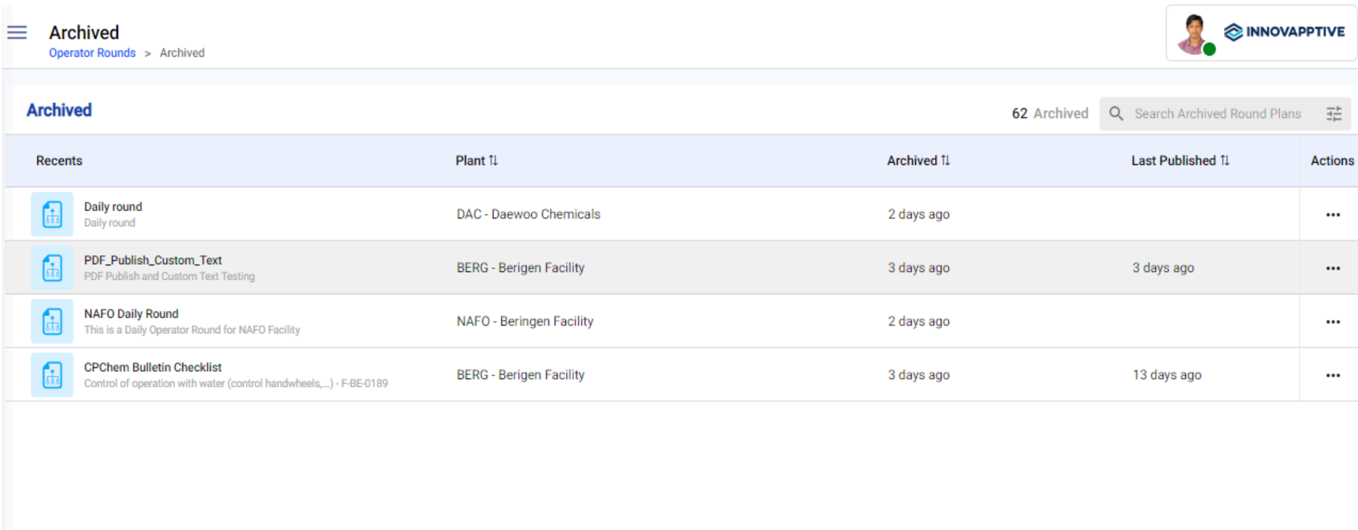
Figure 3-8 Observations Screen



Archived

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

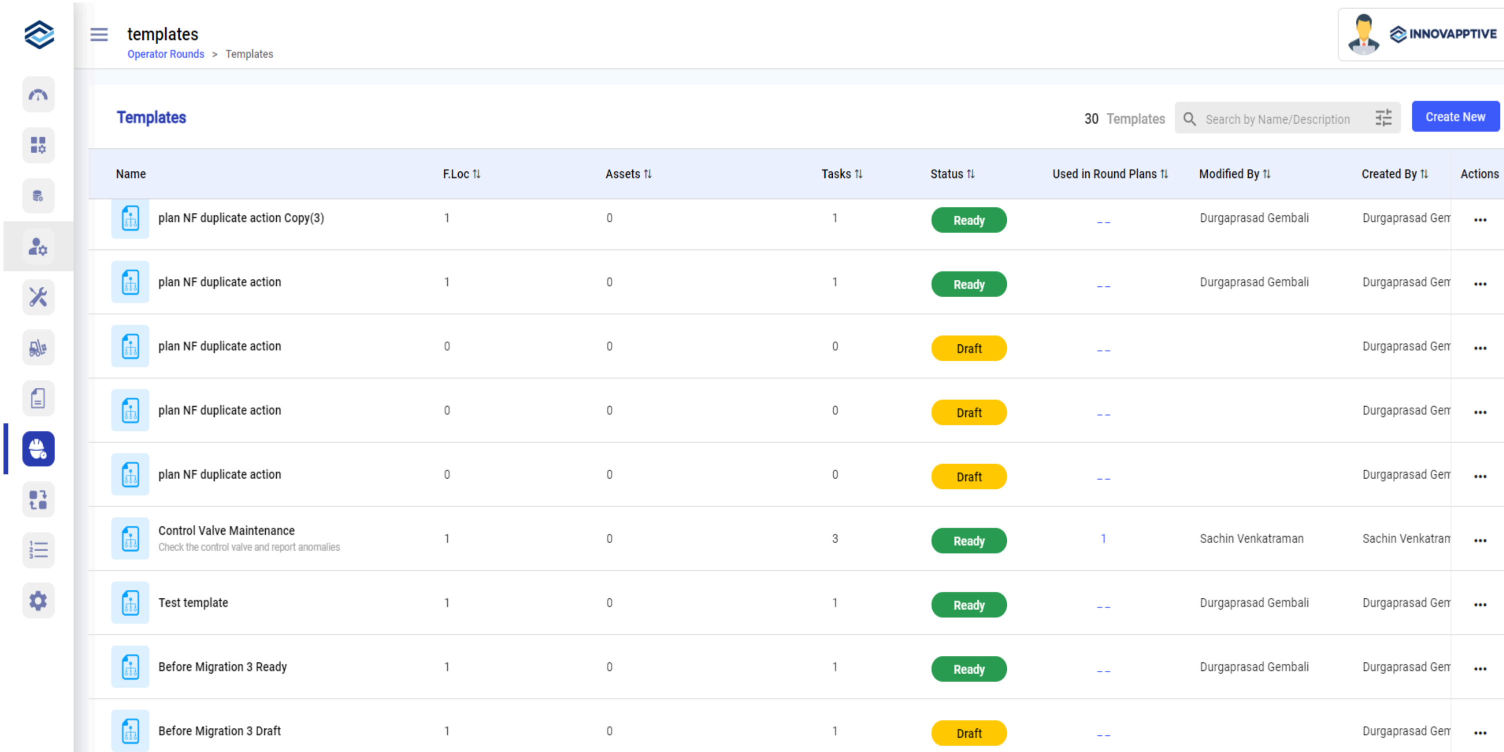
Figure 3-9 Archived Screen



Templates

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

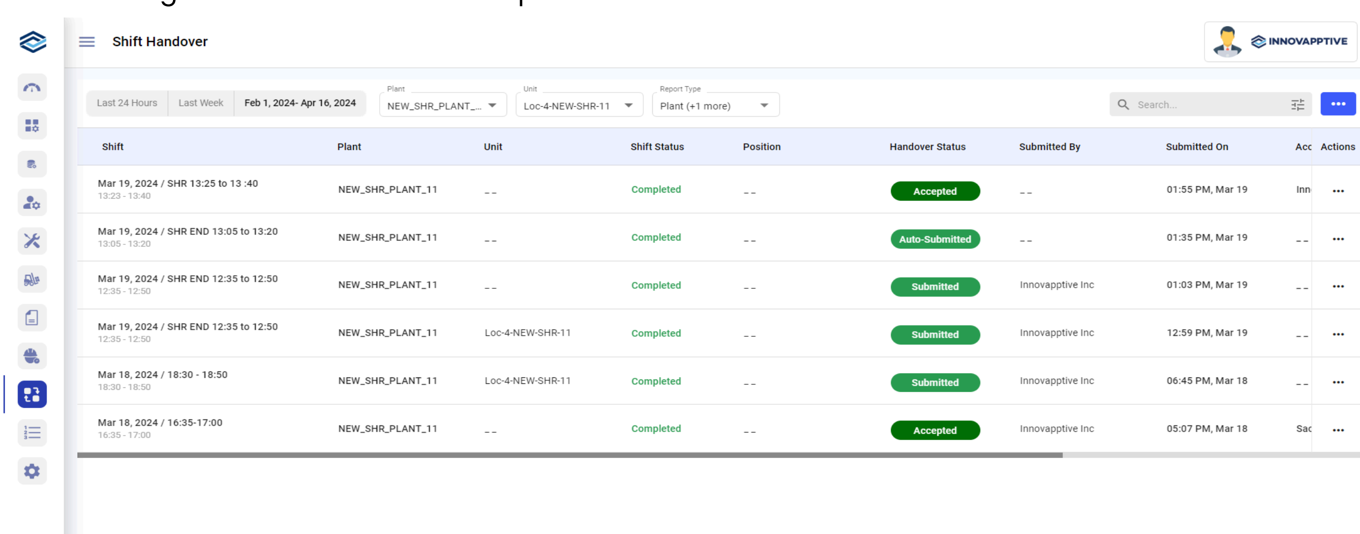
Figure 3-10 Templates Screen



Shift Handover

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

Figure 3-11 Shift Handover Reports Screen



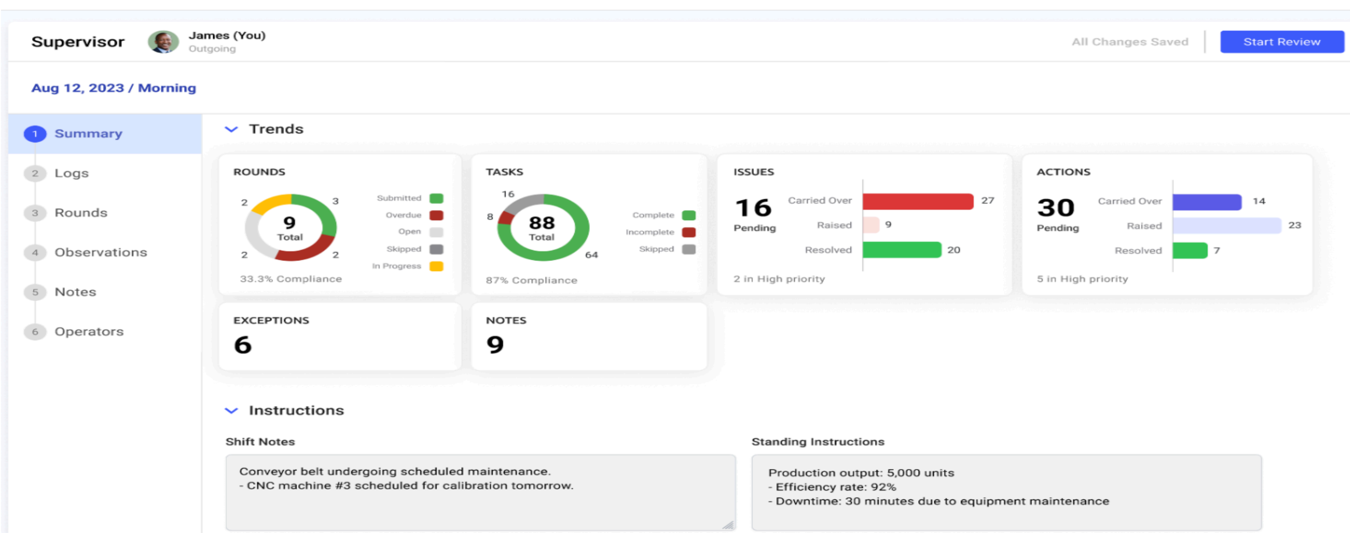
4. Review Accept Shift Handover Report

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

To review and accept the shift handover report:

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

Figure 4-1 SHR Review



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

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

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

5. Monitor in Real-Time and Share Reports

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

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

Dashboard Features and Functionality

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

- Access your Custom Dashboard *(on page 51)* with personalized metrics and indicators.
- Generate detailed Compliance Reports *(on page 60)* to monitor adherence to standards.
- Review Monitor Anomalies Using the Exceptions Dashboard *(on page 61)* highlighting deviations from expected parameters.
- Analyze team performance through the Operator Productivity Dashboard *(on page 63)*.
- Share Dashboard Data as PDF Reports *(on page 66)* with stakeholders and management.
- Share Round Plans *(on page 66)* with team members for improved coordination.

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

5.1. Custom Dashboard

The Custom Dashboard allows supervisors to create and manage plant-specific dashboards. Each dashboard is associated with a single plant and displays data only for that plant.

Supervisors can customize their experience by configuring widgets on the dashboard to display the most relevant data for their tasks. Configurable widgets enable improved task monitoring and more efficient data analysis. Widgets can be downloaded or exported in PDF and Excel formats, or shared via email, streamlining collaboration and reporting. For more information, see Create Custom Widgets *(on page 53)*.

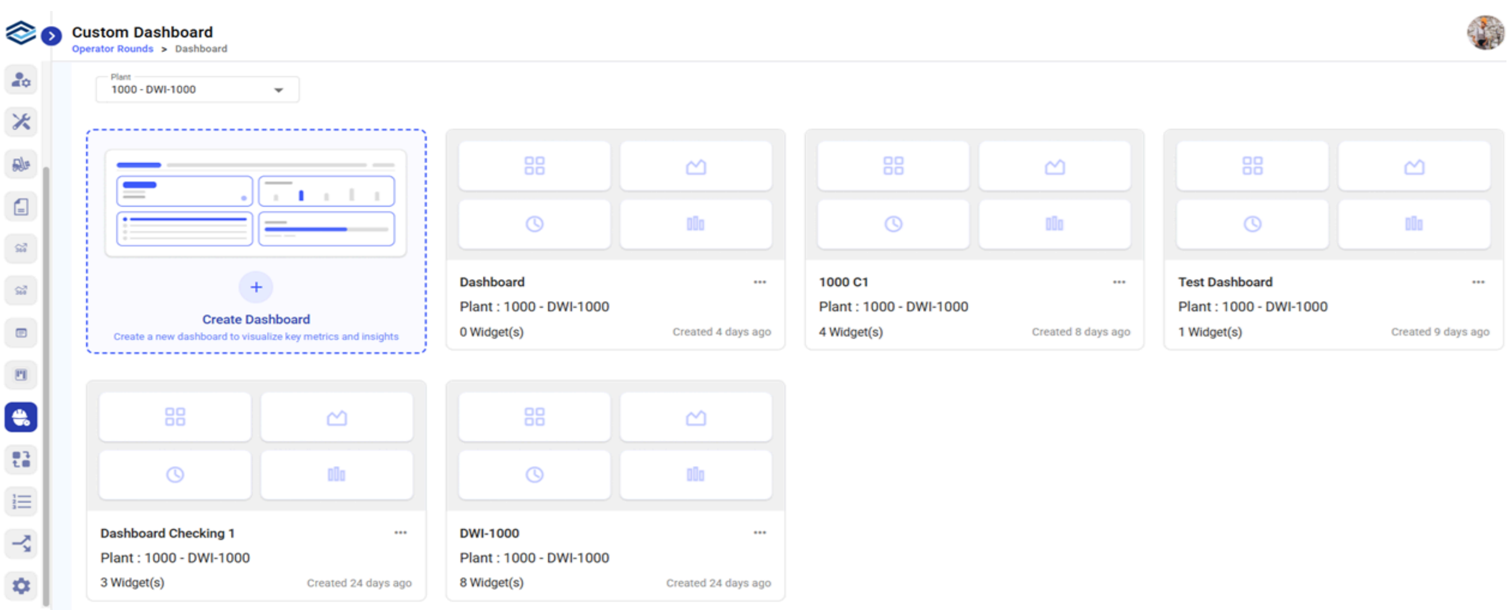
To view the Custom Dashboard:

1. Open the **mRounds Web Application**.
2. Expand the **Operator Rounds** module and click **Custom Dashboard** on the left-side pane.
3. Click **Custom Dashboard**.

   The Custom Dashboard opens with a list of dashboards that you have access to.

   Each dashboard shows:
   - Dashboard name
   - Associated Plant
   - Number of widgets

   Figure 5-1 Custom Dashboard



Create a Plant-Level Dashboard

To create a dashboard:

1. Expand the **Operator Rounds** module on the left-side pane.
2. Open **Custom Dashboard**.
3. Click **Create Dashboard**.
4. Provide below details in the dialog box:
    a. Enter a **Title**.
    b. Select a **Plant** from the Plant dropdown.
5. Click **Create**.

The dashboard appears as a card under the selected plant.

> **Note:**
>
> NOTE: Dashboards are always associated with **one plant**
>
> .

5.1.1. Create Custom Widgets

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

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

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

To create a widget:

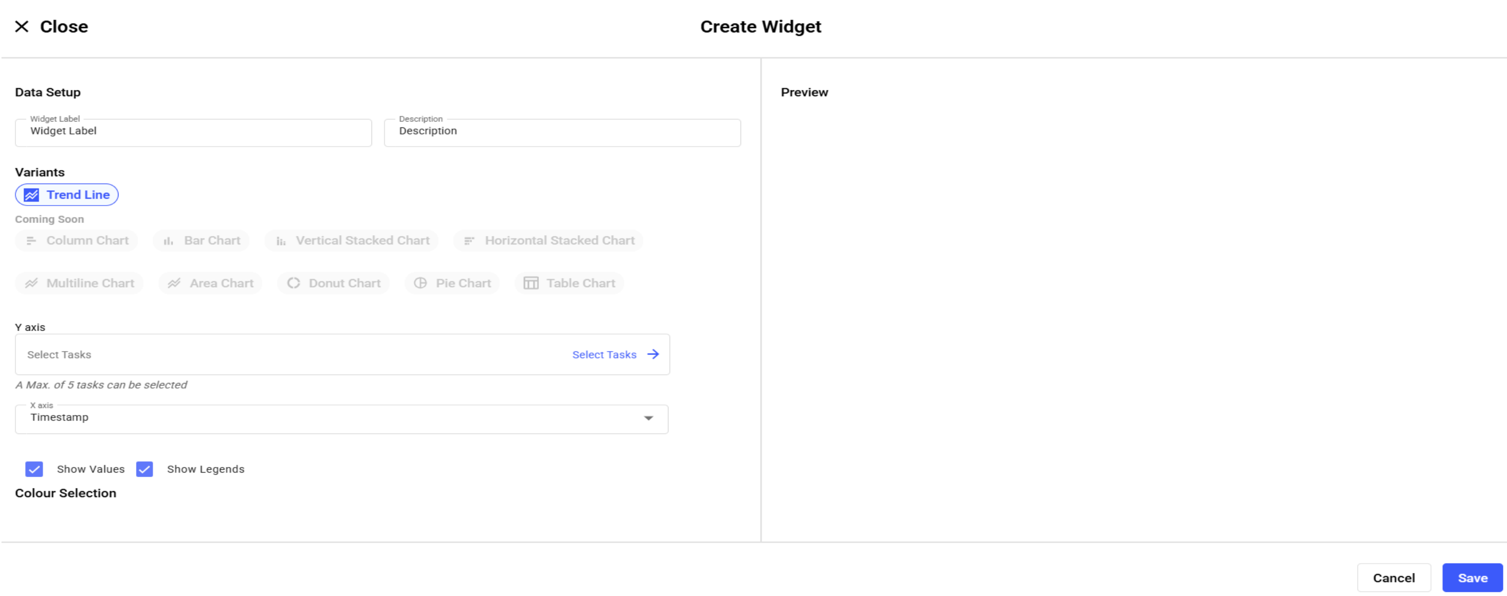
1. Expand the **Operator Rounds** module and click **Custom Dashboard** on the left-side pane.
2. Click **Custom Dashboard**.
3. Click on an existing dashboard card to open the dashboard.
4. Click **Create Widget**.
5. Select one of the following based on your requirement from the dropdown:

a. **Pre-Built (Only Trends)** - Used for quick, trend-based visualizations with limited configuration.
b. **Report** - Used to create widgets from existing reports with full chart and layout control.

Create Pre-Built (Only Trends) Widget:

a. Provide below details in Create Widget screen:
    i. Widget Label
    ii. Description
    iii. Under **Variants** select **Trend Line**.
    iv. Configure the axes:
        1. Y axis: Select up to 5 tasks
        2. X axis: Timestamp (default)
    v. Select display options
        1. Show Values
        2. Show Legends
    vi. Configure colors under **Colour Selection**.
    vii. Click **Save**.

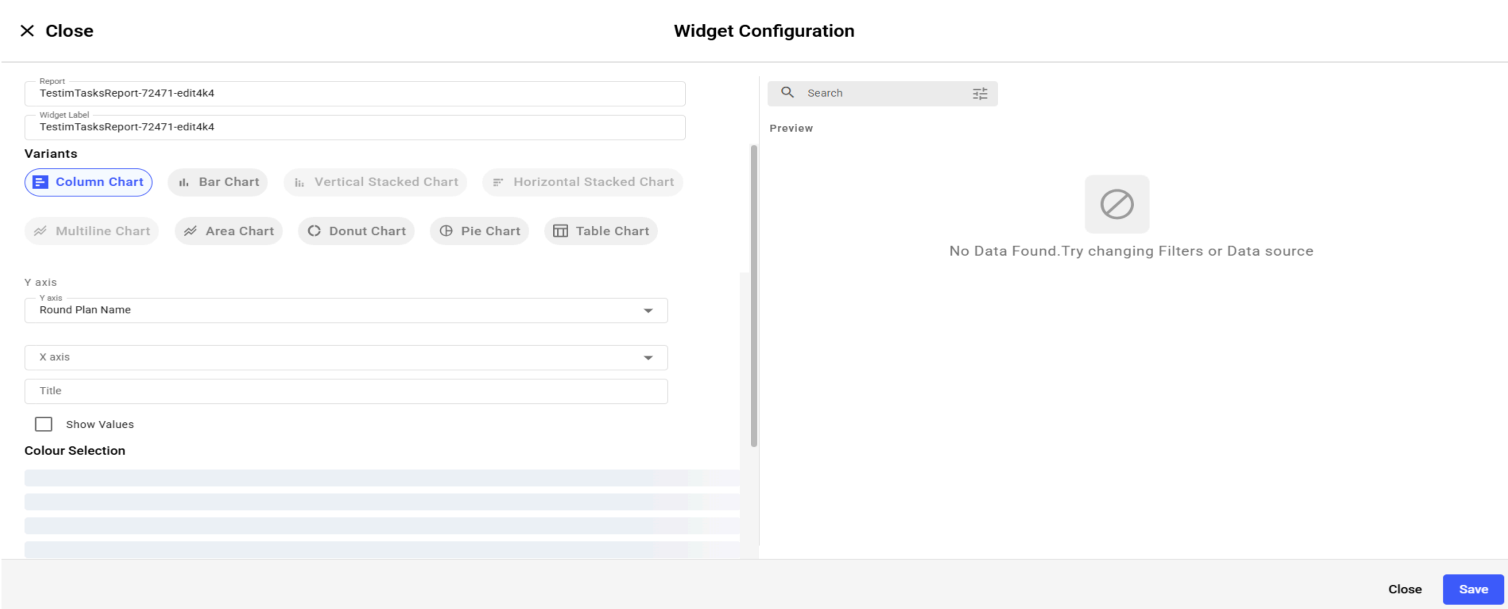
The widget is added to the dashboard and displays trend data for the dashboard's plant.



Create a Widget from a Report

a. Provide below details in Widget Configuration screen:

  i. Select a **Report**.
  ii. The **Widget Label** is auto-filled using the report name or update if a different label is required.
  iii. Under **Variants**, select a chart type, such as:
    1. Column Chart
    2. Bar Chart
    3. Vertical Stacked Chart
    4. Horizontal Stacked Chart
    5. Multiline Chart
    6. Area Chart
    7. Donut Chart
    8. Pie Chart
    9. Table Chart
  iv. Configure the axes
    1. **Y axis**: Select Shift Name or Shift ID from dropdown.
    2. **X axis**: Timestamp (default)
  v. Select display options "Show Values".
  vi. Adjust Colour Selection for fills and legends.
  vii. Review the live Preview panel.
  viii. Click **Save**.



6. In the Dashboard screen, you can:

,

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

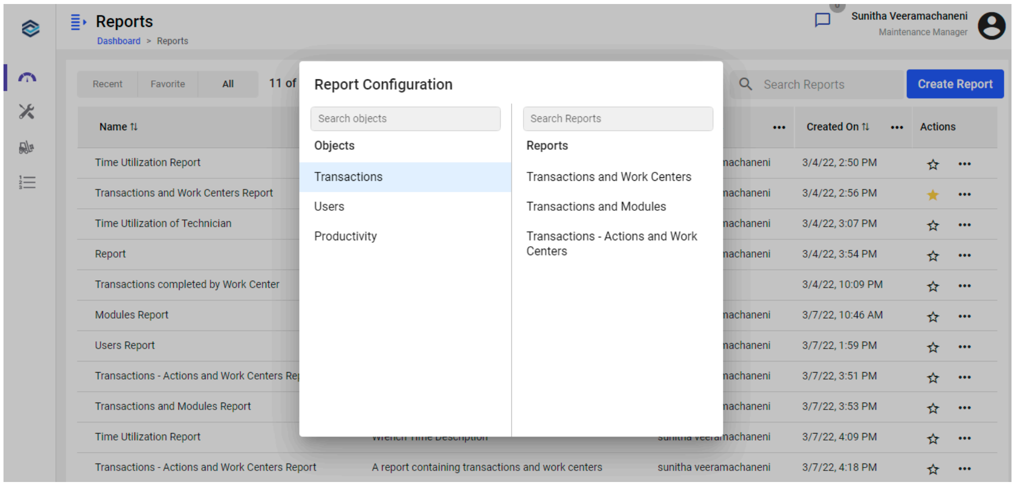
5.2. Create Transactions Reports

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

To create a report:

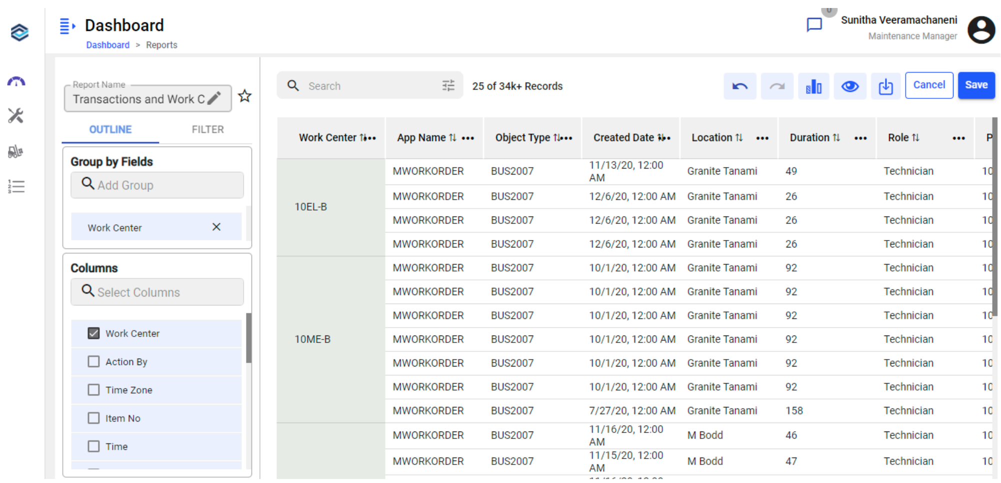
1. Click the **Reports** on the left-side pane.
2. In the **Reports** screen, click the **Create Report** button.

Figure 5-2 Select Objects and Reports



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

Figure 5-3 Add Report Details



In this screen, you can,

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

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

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

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

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

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

In this screen, you can,

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

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

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

5.3. Compliance Reports

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

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

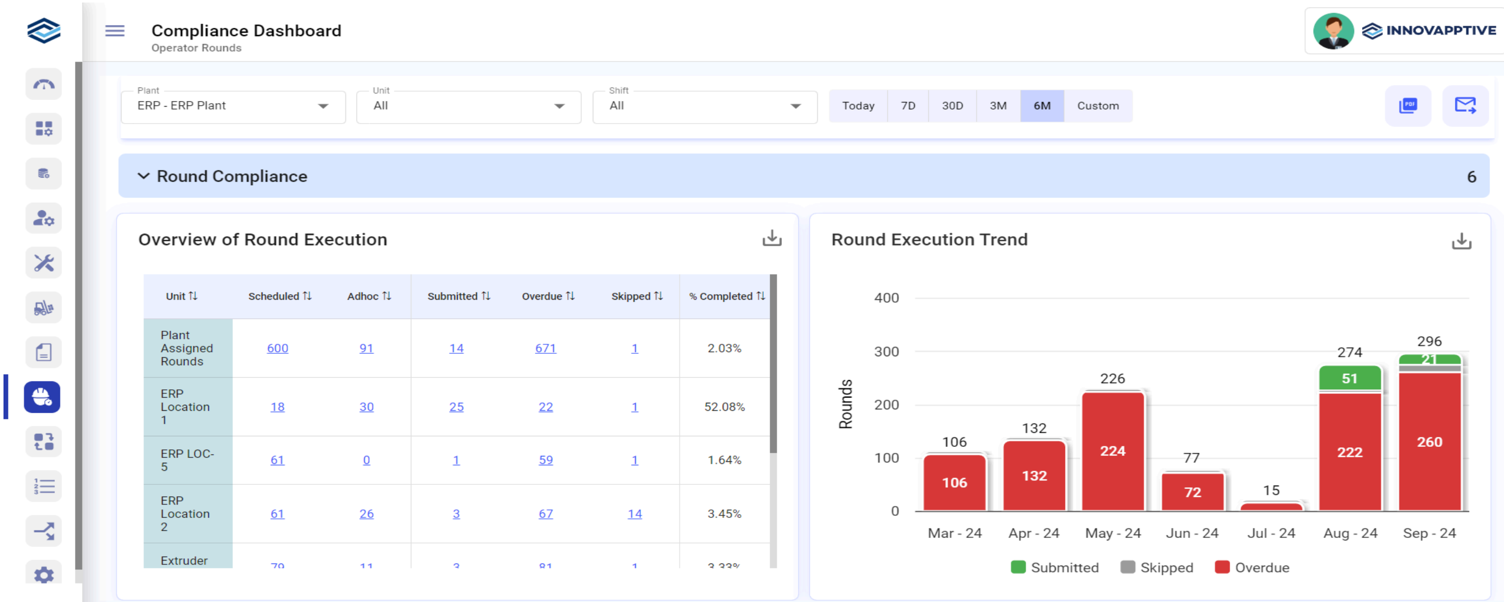
To view compliance reports:

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

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

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

Figure 5-4 Compliance Dashboard



In this screen you can,

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

5.4. Monitor Anomalies Using the Exceptions Dashboard

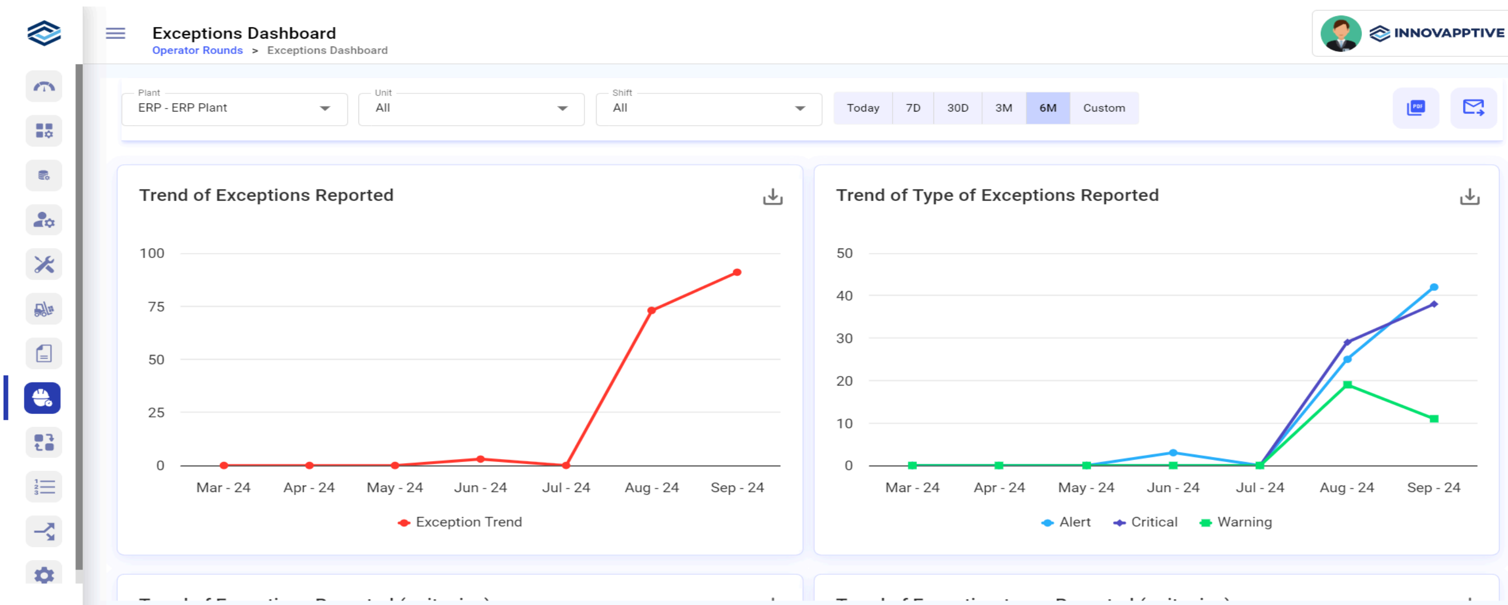
The **Exceptions Dashboard** helps you quickly identify and respond to issues that fall outside normal workflows or performance standards. It provides a real-time view of anomalies so you can take timely action before problems escalate.

The dashboard highlights critical exceptions, including:

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

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

Figure 5-5 Exceptions Dashboard



In this screen you can,

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

5.5. Operator Productivity Dashboard

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

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

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

Key Performance Widgets

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

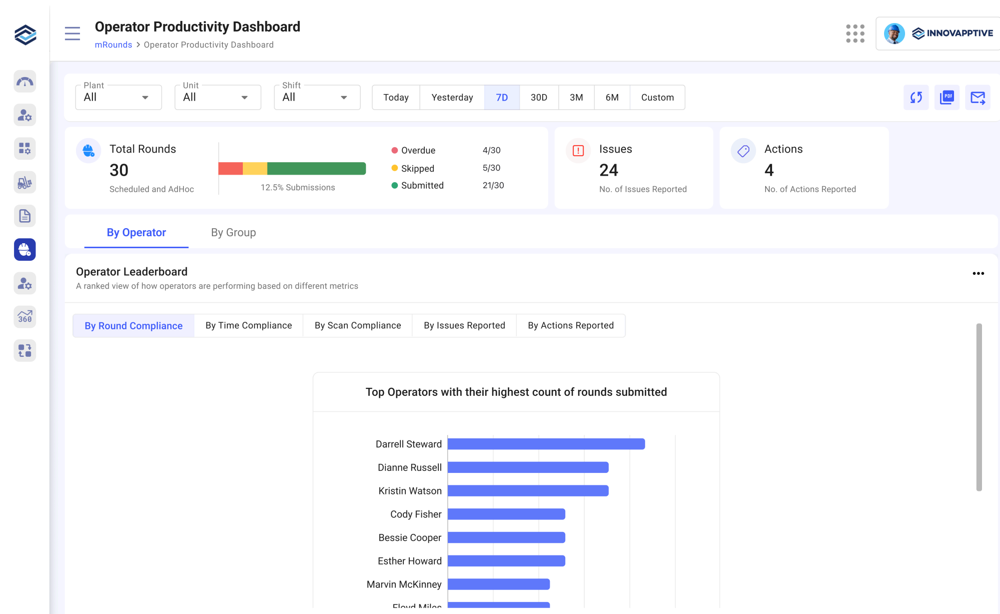
- **Round Compliance** – Shows how many rounds were completed vs. assigned, as both a count and a percentage.
- **Non-Compliance** – Highlights overdue rounds (missed deadlines) and skipped rounds.
- **Issues** – Displays the number of issues reported during rounds, helping prioritize maintenance and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

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

To view the Operator Productivity Dashboard:

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

Figure 5-6 Operator Productivity Dashboard



5.5.1. Operator Productivity Dashboard - By Operator

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

Performance Views

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

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

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

5.5.2. Operator Productivity Dashboard - By Group

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

Group Performance Views

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

User Group Performance Table

Each group record includes:

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

5.6. Share Dashboard Data as PDF Reports

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

To download and share the reports:

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

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

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

5.7. Share Round Plans

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

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

To download and share a Round Plan:

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

5.8. Operations Control Center Dashboard

The Operations Control Center (OCC) gives supervisors a real-time view of all operational activities across rounds, issues, and follow-up actions. It displays information in clear status boards so supervisors can easily monitor progress, identify delays, and manage workload effectively.

Built-in filters help you refine data by **Plant**, **Sort By options** (such as Due Date), and **time ranges**, including Today, Yesterday, 7 Days, 30 Days, 3 Months, 6 Months, or a Custom period.

Users can also create new records using the Create Ad Hoc Round, Create Issue, or Create Action options.

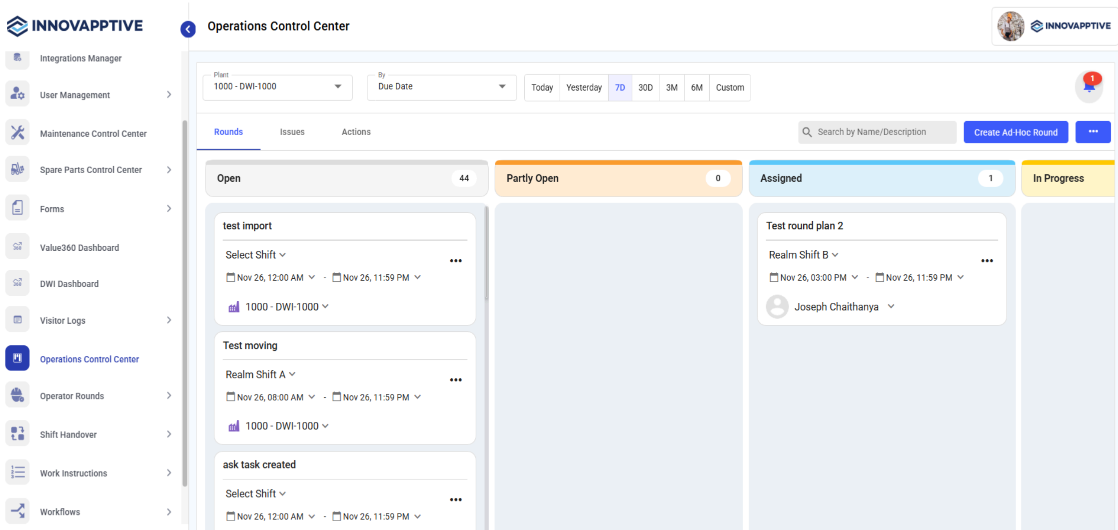
Access the Operations Control Center

To access the OCC module:

1. Click the Hamburger menu on the top left of the screen.
2. Click the Operations Control Center module.
3. Choose between **Rounds**, **Issues**, or **Actions** to review operational performance.

The Operations Control Center provides a complete visual overview of ongoing operations, enabling faster decision-making, improved accountability, and proactive issue resolution.

Figure 5-7 Operations Control Center Dashboard



The module is organized into three main tabs for navigation: **Rounds**, **Issues**, and **Actions**.

Rounds Tab

The **Rounds** tab displays all planned and ad hoc rounds in a status-wise board. This helps supervisors track round progress and quickly identify overdue or skipped tasks.

The board organizes rounds into the following columns:

- **Open** – Rounds that are assigned but not yet started.
- **Partly Open** – Rounds that have some checkpoints completed.
- **Assigned** – Rounds assigned to specific operators.
- **In Progress** – Rounds currently being executed.
- **Submitted** – Rounds completed and submitted.
- **Pending Approval** – Rounds awaiting supervisor review.
- **Closed** – Fully approved and closed rounds.
- **Overdue** – Rounds not submitted by the due time.
- **Skipped** – Rounds intentionally skipped or not executed.

Each card shows:

- Round Name
- Shift
- Scheduled time
- Assigned Operator
- Progress (%)
- Related functional location or unit

Users can click any card to view full round details or update action items.

Issues Tab

The **Issues** tab helps users view issues categorized by their progress & manage them effectively.

The issues are displayed categorized by their status and it helps supervisors quickly analyze critical issues and prioritize work:

- **Open** – Newly created issues that require action.
- **In Progress** – Issues currently being investigated or resolved.
- **Resolved** – Issues that have been fixed and await closure.

Each issue card displays:

- Issue name
- Priority (Emergency, High, Medium, Low)
- Issue type (Hazard, Incident, Maintenance, etc.)
- Functional location / equipment
- Created and due timestamps
- Assigned user
- Action button to assign or reassign the issue

This tab helps supervisors quickly analyze critical issues and prioritize work.

Actions Tab

The **Actions** tab displays all corrective or follow-up actions categorized by their status and help supervisors manage them effectively.

Actions are displayed under the following columns:

- **Open** – Actions that are created but not yet started.
- **In Progress** – Actions that are actively being worked on.
- **Resolved** – Actions completed by the responsible user.

Each card includes:

- Action name
- Priority level
- Functional location
- Created timestamp
- Assigned user
- Option to assign or update the action.

6. Create, Review and Schedule a Round Plan

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

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

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

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

A round plan has the following status:

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

This chapter has the following topics:

- Understanding Response Types Used for Creating Round Tasks *(on page 71)*
- Create a Round Plan and Publish *(on page 99)*
- Review and Approve Round Plans *(on page 118)*
- Schedule Round Plans *(on page 123)*
- Create and Manage Round Templates *(on page 170)*

6.1. Understanding Response Types Used for Creating Round Tasks

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

Design your round plan task comprehensively to:

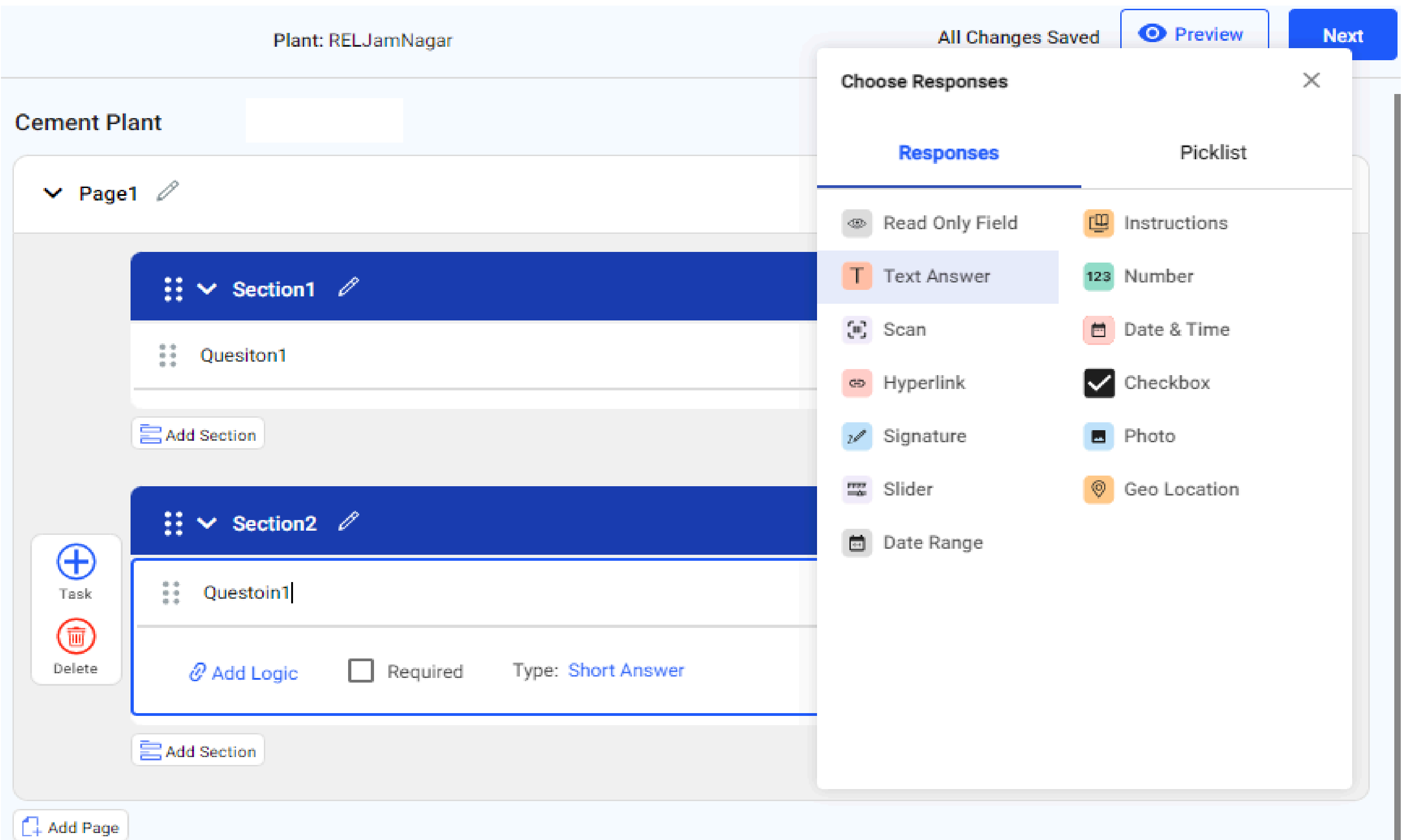
- Capture all the required information about the assets.
- Make it simpler to do maintenance checks in an orderly manner.
- Enhance the field user experience.

Follow the below pointers to create an effective round plan:

Pages and Sections

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

Structure round plans using the following hierarchy:



- **Pages**

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

  Add sections inside each page to group relevant tasks together.
- **Tasks**

  Add tasks with logical questions under each section with different response types along with required conditional logic.
- **Standard Response Types**

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

  The application supports the following Standard Response Types:
    - Read Only Field *(on page 84)*
    - Text Answer *(on page 76)*
    - Scan *(on page 74)*
    - Hyperlink *(on page 85)*
    - Signature *(on page 95)*
    - Slider *(on page 86)*
    - Date Range *(on page 87)*
    - Instructions *(on page 75)*
    - Number *(on page 77)*
        - Number with the Unit of Measurement *(on page 79)*
        - Number Range and Exceptions *(on page 80)*
    - Date and Time *(on page 88)*
    - Checkbox *(on page 89)*
    - Attachment *(on page 89)*
    - Geo Location *(on page 74)*
    - Multiple Choice *(on page 90)*
    - Global Picklist *(on page 92)*
    - Conditional Logic *(on page 96)*.

6.1.1. Scan

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

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

To add scan response type:

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

6.1.2. Geo Location

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

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

To add Geo Location response type:

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

Figure 6-1 Geo Location Response Type

6.1.3. Instructions

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

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

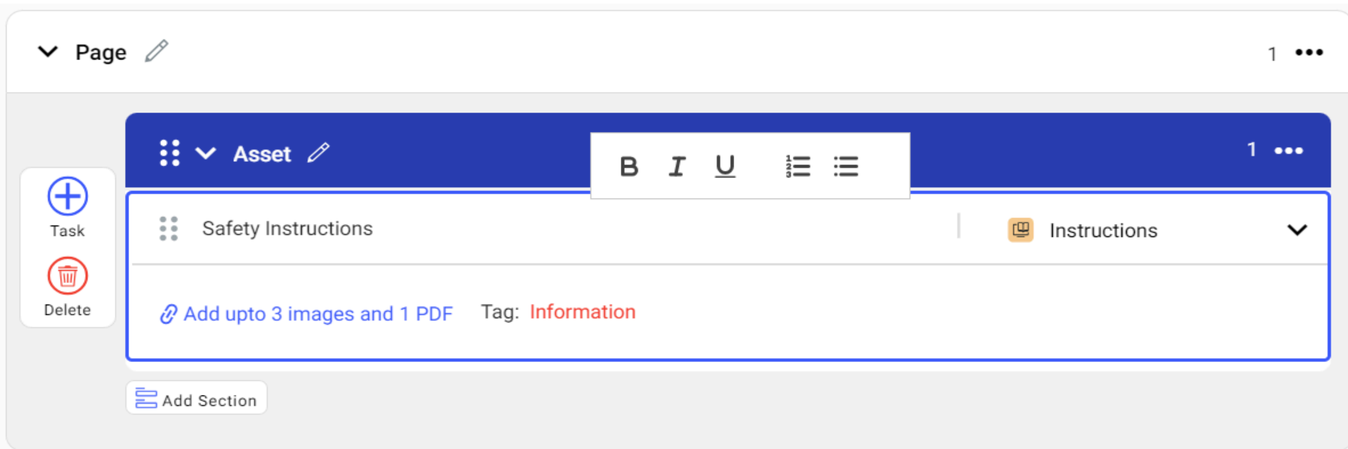
To add instructions response type:

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

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

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

Figure 6-2 Instructions Response Type



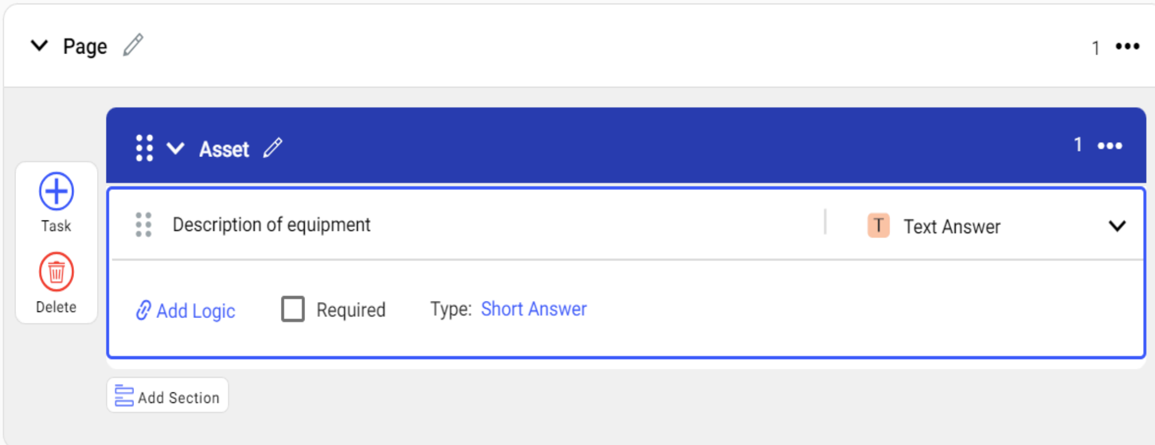
6.1.4. Text Answer

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

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

To add text answer response type:

1. Enter a task or question as Are there any visible leaks on the control valve?.
2. Select the **Text Answer** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 96)*.
4. Select the **Required** check box if the value is required.
5. Select the **Type** as **Short Answer** or **Long Answer**.



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

6.1.5. Number

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

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

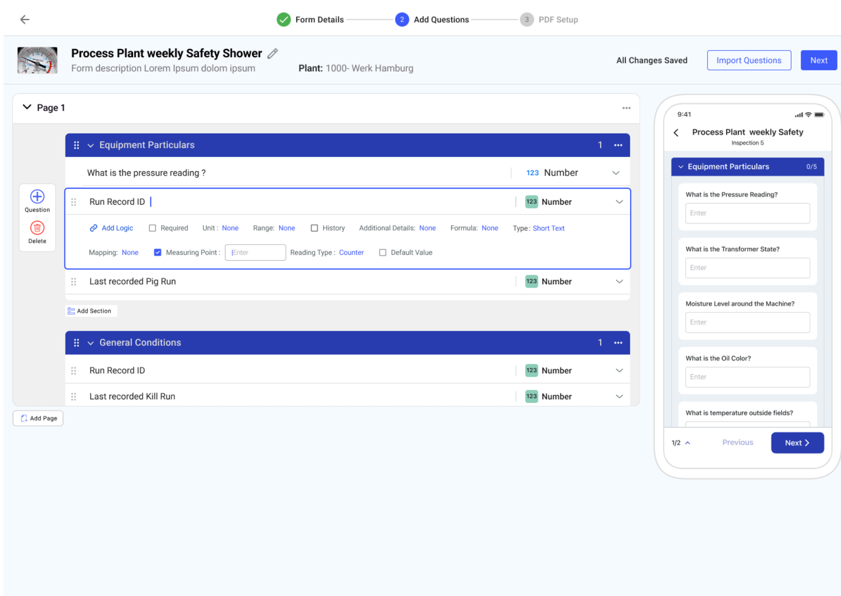
To add number response type:

1. Enter the task or question, such as Record the pressure reading from the valve gauge.
2. From the **Responses** dropdown, select **Number**.
3. Click **Add Logic** to define conditional logic for this task. (Optional) For more information, see Conditional Logic *(on page 96)*.
4. Enable the following options as needed:

- **Required** – Check this if the technician must enter a value (including decimal values) to complete the task.
- **Unit** – Choose from available units like meter (m), liter (l), Celsius (°C), etc. (For more, see: Number with the Unit of Measurement *(on page 79)*)
- **Range** – Define minimum and maximum values for the selected unit. (For more, see: Number Range and Exceptions *(on page 80)*)
- **History** – Select this to show past readings in the mobile app. Enter how many past values to display (e.g., 5).

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

Figure 6-3 Measuring Point



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

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

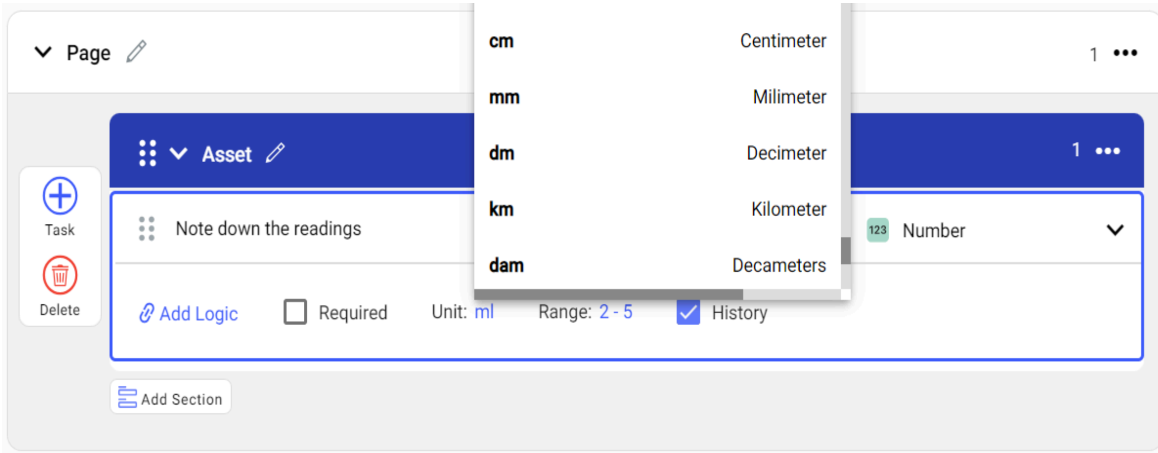
6.1.5.1. Number with the Unit of Measurement

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

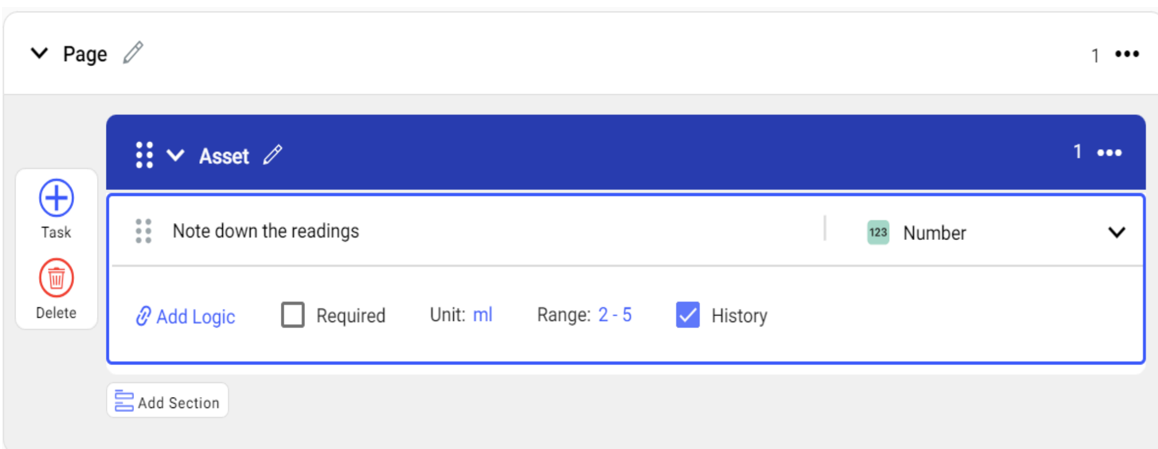
For example, the operator or technician records **85°C**, which is within the acceptable range.

To add unit value:

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



5. Select the **Range** for the selected Unit. For more information, see Number Range and Exceptions *(on page 80)*.
6. Select the **Required** check box if the value is required.



6.1.5.2. Number Range and Exceptions

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

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

To add range value and add exceptions:

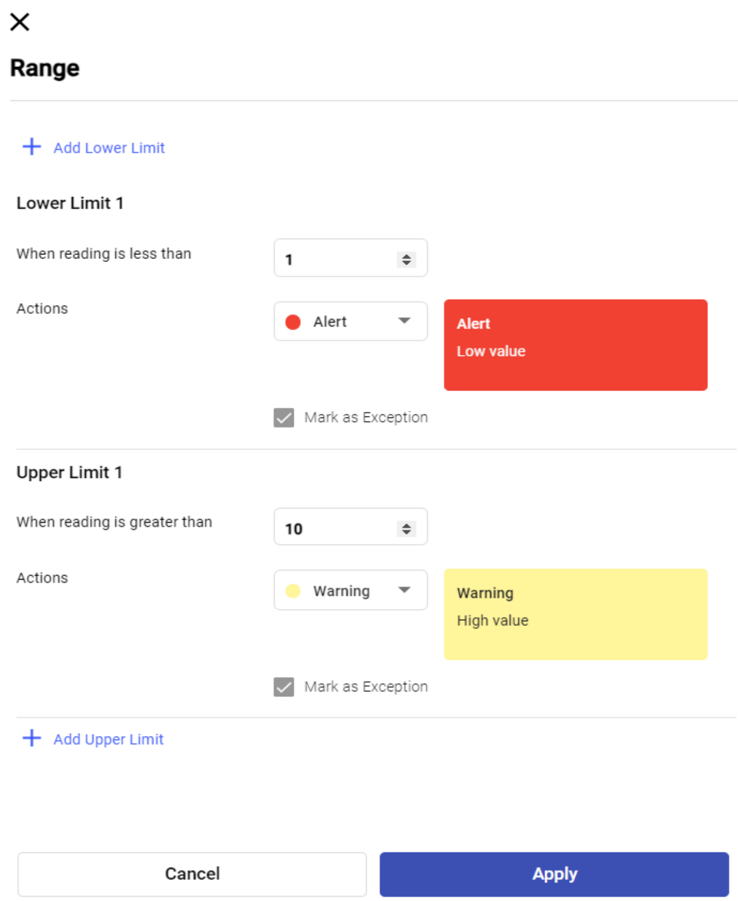
1. Enter a task or question as Does the valve actuator function within the specified range?.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the relevant **Unit** like Celsius (^{O}C) for the temperature. For more information, see Number with the Unit of Measurement *(on page 79)*.
5. Click the **Range** link and add range values for the selected Unit.
6. In the **Range** window,

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

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

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

Figure 6-4 Number Range



7. Click **Apply**.

6.1.5.3. Add Formulas to fields

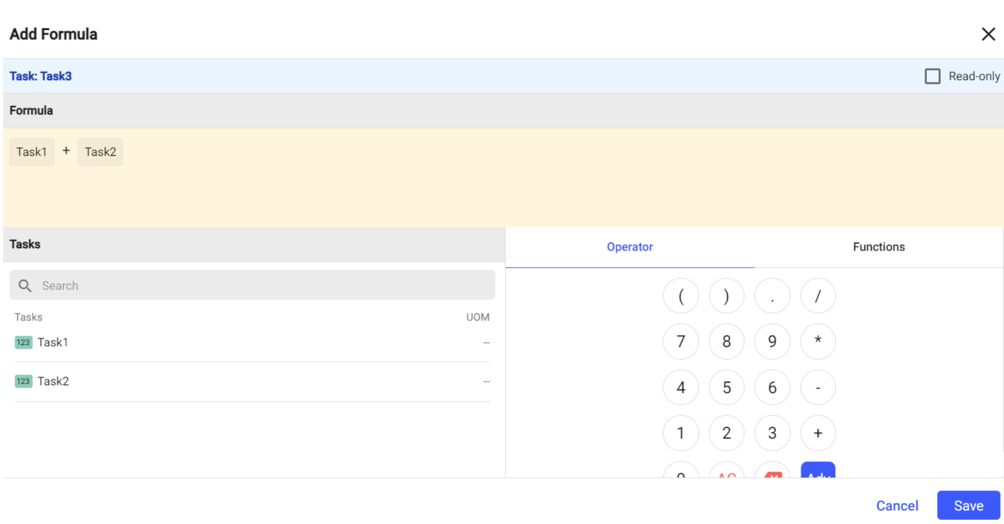
Formula in Number response type is used to automatically calculate values based on inputs from other fields. This is particularly useful for maintenance metrics like efficiency, operational performance, or usage calculations.

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

To add a formula to field:

1. Enter a task or question as Calculate Valve Efficiency.
2. Select the **Number** value from the **Responses** drop-down.
3. Select the **Required** check box if the value is required.
4. Select the **Unit**. For example, meter (m), centimeter (cm), liter (l), Celsius ($^{\circ}$C), and so on. For more information, see Number with the Unit of Measurement *(on page 79)*.
5. Select the **History** check box and add readings.
6. Click the **Formula** link.
7. In the **Add Formula** editor, add calculations and click **Save**.

Figure 6-5 Add Formula

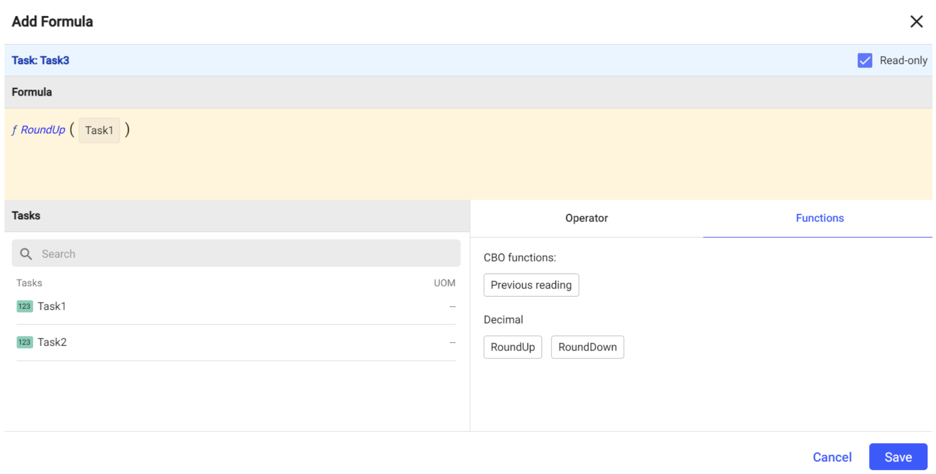


The configured formula is applied to the respective field and the calculated values are updated dynamically.

In this editor, you can,

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

Figure 6-6 Add complex formula



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

6.1.6. Read Only Field

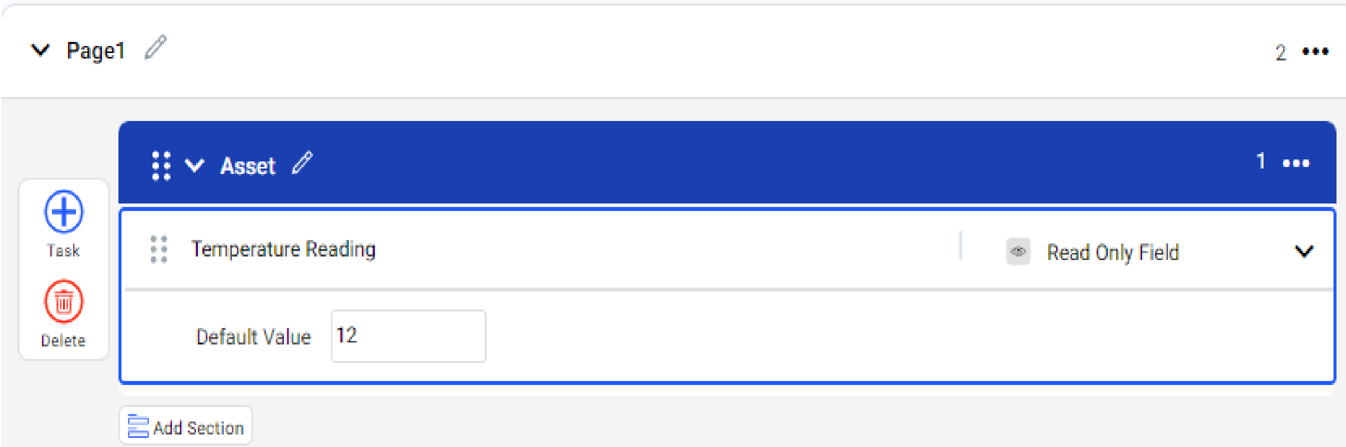
Read Only field response type is used in asset maintenance checks or inspections to display important information and prevent accidental changes to critical data. This response type is disabled for editing.

For example, Temperature threshold on a boiler unit.

To add read only field response type:

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

Figure 6-7 Read Only Response Type



6.1.7. Hyperlink

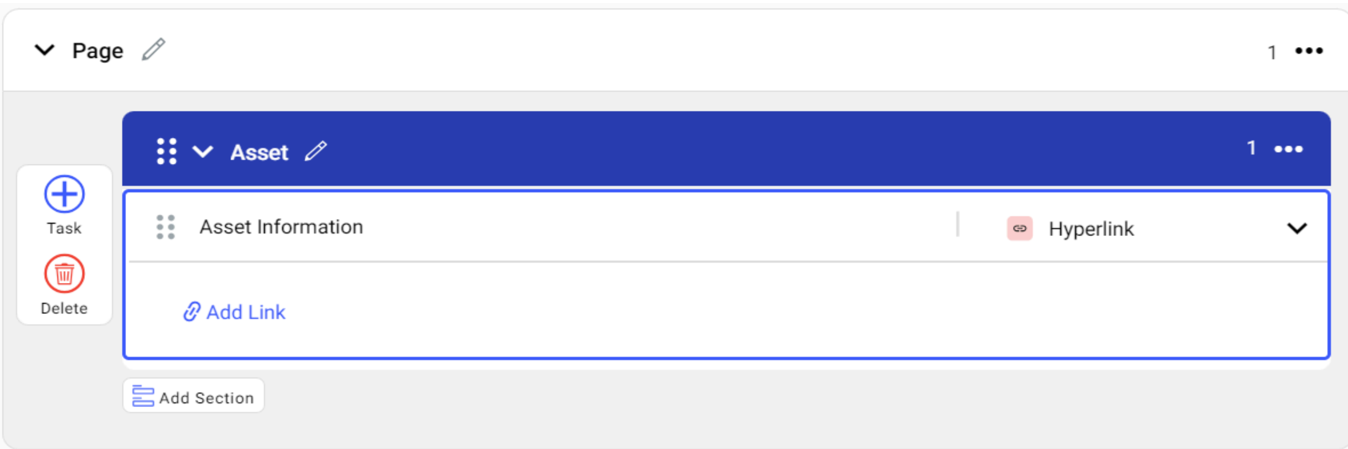
Hyperlink response type is use to link to external documents, such as user manuals or safety sheets.

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

To add hyperlink response type:

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

Figure 6-8 Hyperlink Response Type



6.1.8. Slider

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

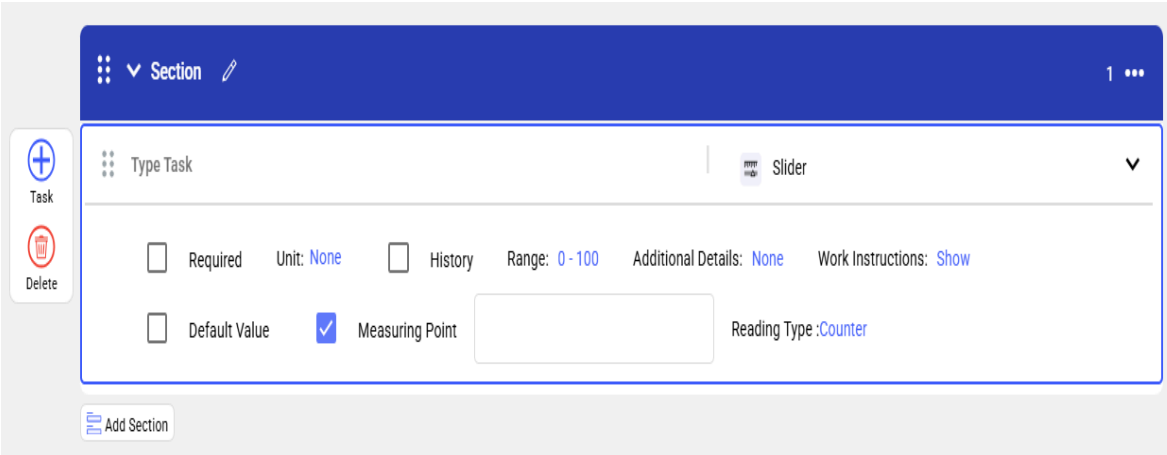
For example, the operator or technician sets the slider to **35°C**.

To add slider response type:

1. Click Work Instructions to see the instructions while recording the value.
2. Enter a task or question as Set the valve operation temperature within the range of -10°C to 50°C.
3. Select the **Slider** value from the **Responses** drop-down.
4. In the **Slider** window, enter the **Range** which appears on the right side and click **Apply**.
5. Select the **Required** checkbox if the value is required.

6. Select a **Unit** of measurement from the dropdown (for example, meter (m), liter (L), Celsius (°C), etc.).
7. Select the **History** checkbox and enter the number of readings (for example, between 0 and 20) to configure the display of the readings in the mobile application.

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



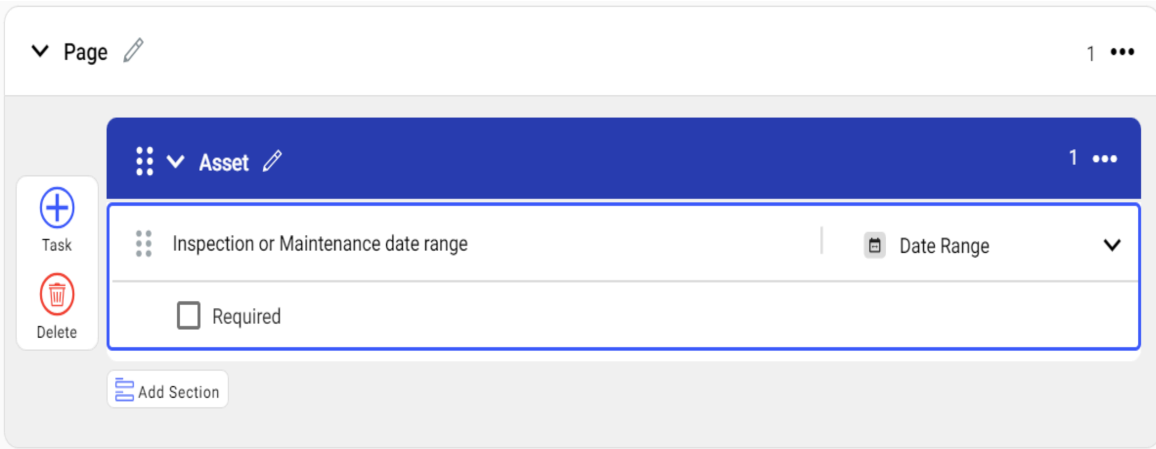
6.1.9. Date Range

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

For example, inspection date range.

To add date range response type:

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



6.1.10. Date and Time

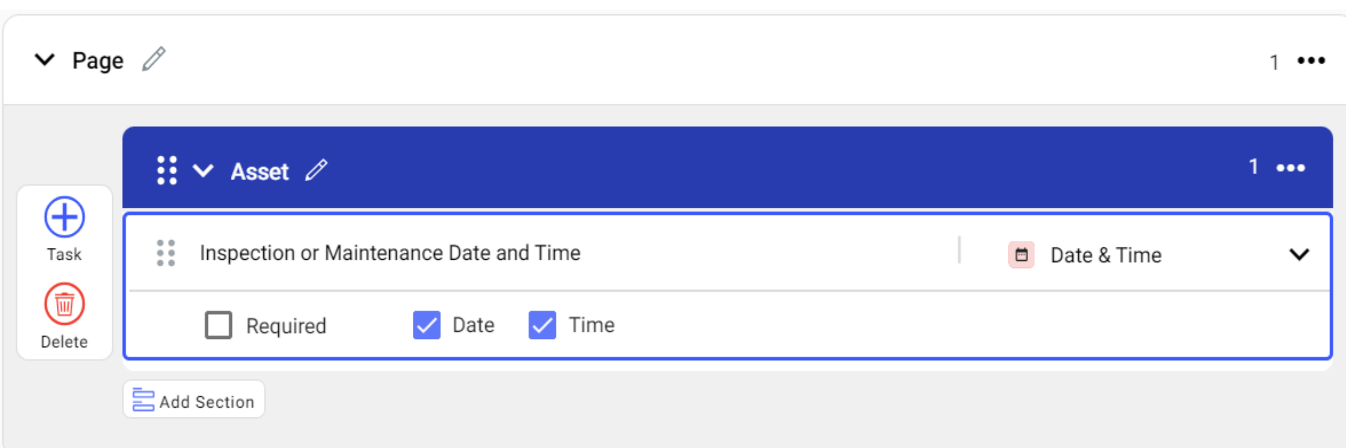
Date and Time response type is used to set future service dates or deadlines.

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

To add date and time response type:

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

Figure 6-9 Date and Time Response Type



6.1.11. Checkbox

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

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

To add check-box response type:

1. Enter a task or question as Confirm that the valve inspection is complete.
2. Select the **Checkbox** value from the **Responses** drop-down.
3. Click **Add Logic** to add conditional logic, if required. For more information, see Conditional Logic *(on page 96)*.
4. Select the **Required** check box if the value is required.

Figure 6-10 Checkbox Response Type

6.1.12. Attachment

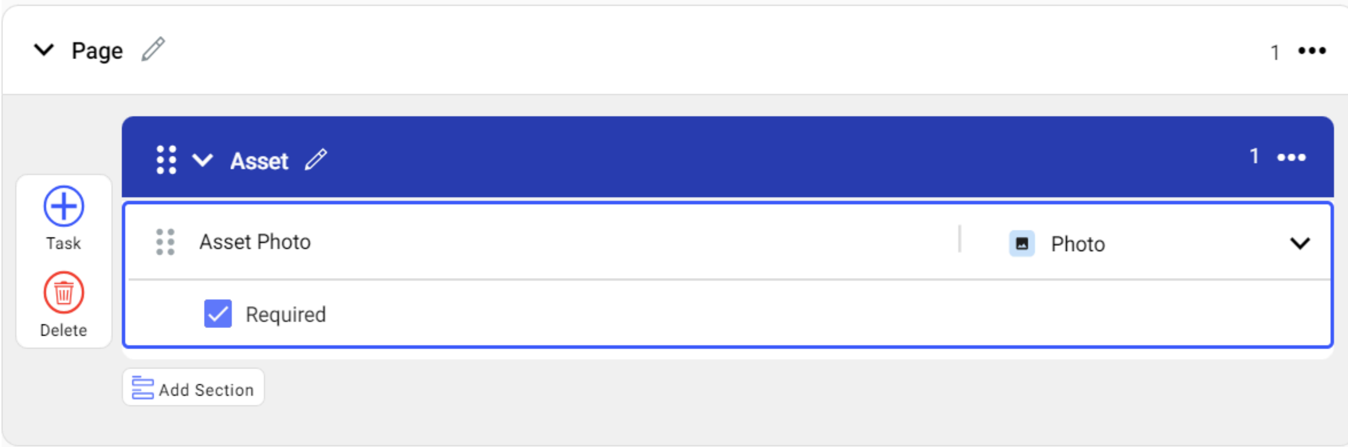
Attachment response type is used to upload files, such as photos or PDFs, to provide additional context.

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

To add photo response type:

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

Figure 6-11 Photo Response Type



6.1.13. Multiple Choice

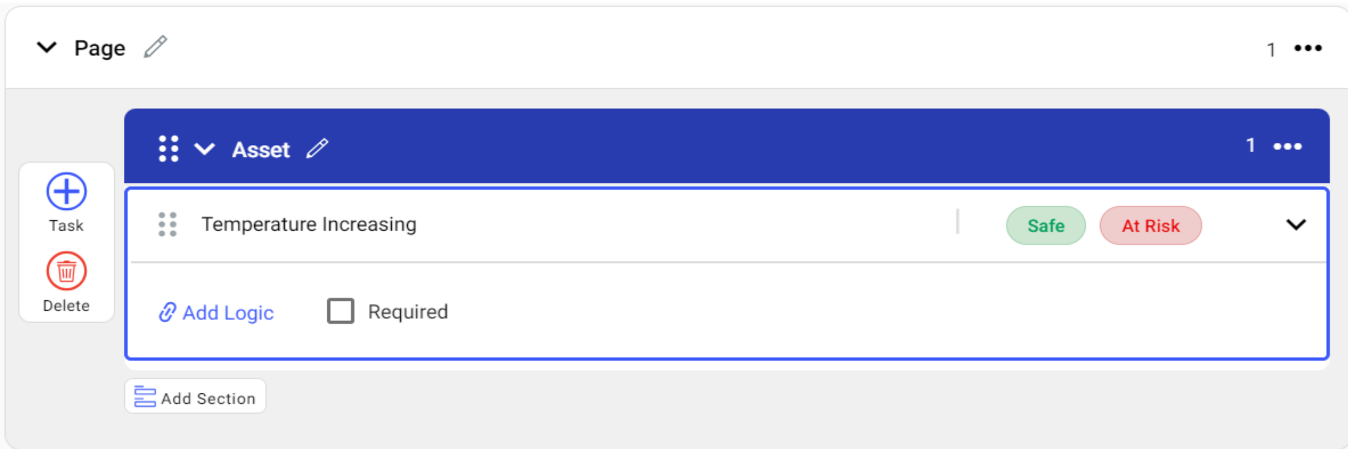
Multiple Choice is used to select predefined conditions for the equipment quickly.

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

To add multiple choice response type:

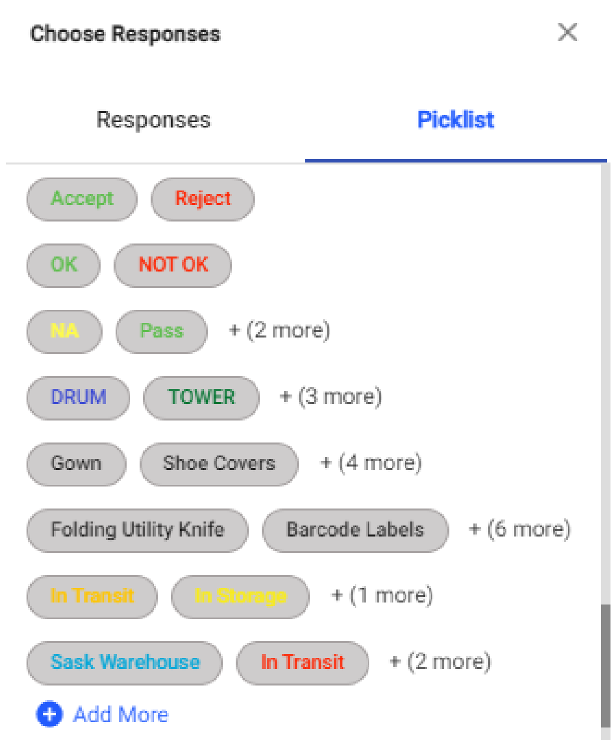
1. Enter a task or question as What is the condition of the control valve?.
2. Click the **Responses** drop-down and click the **Picklist** tab in the **Choose Responses** window.
3. Select the value in the **Multiple Choice** section. For example, Safe and At Risk.

Figure 6-12 Multi Choice Response Type



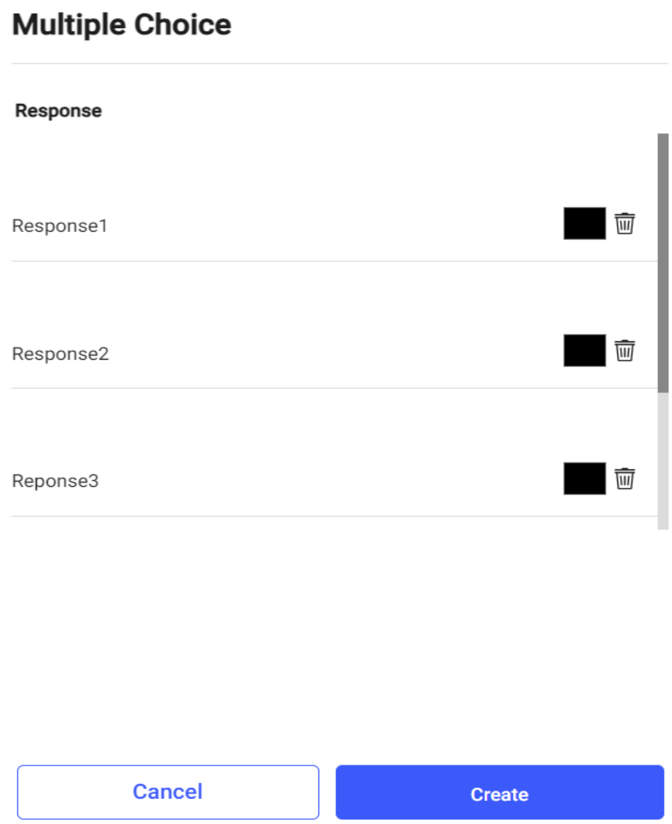
4. Click **Add More** if the required choice is not in the list.

Figure 6-13 Multiple Choice Add More



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

Figure 6-14 Add Multiple Choice Values



6. Click **Create**.

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

6.1.14. Global Picklist

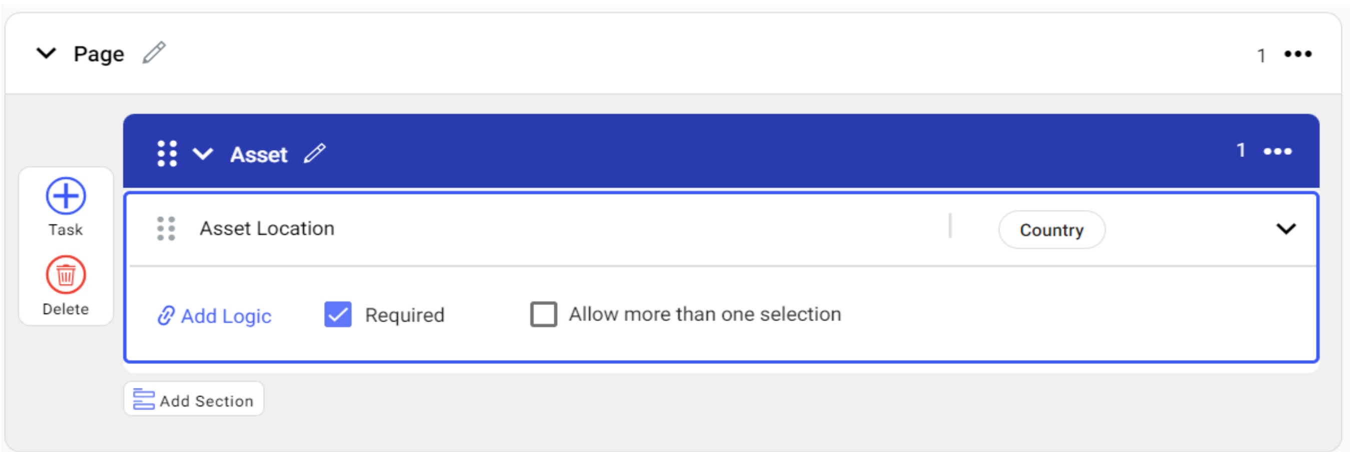
Global Picklist response type provides standardized lists that can be reused across different forms, ensuring consistent data entry such as, a list of manufacturers or equipment types.

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

To add global pick list response type:

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

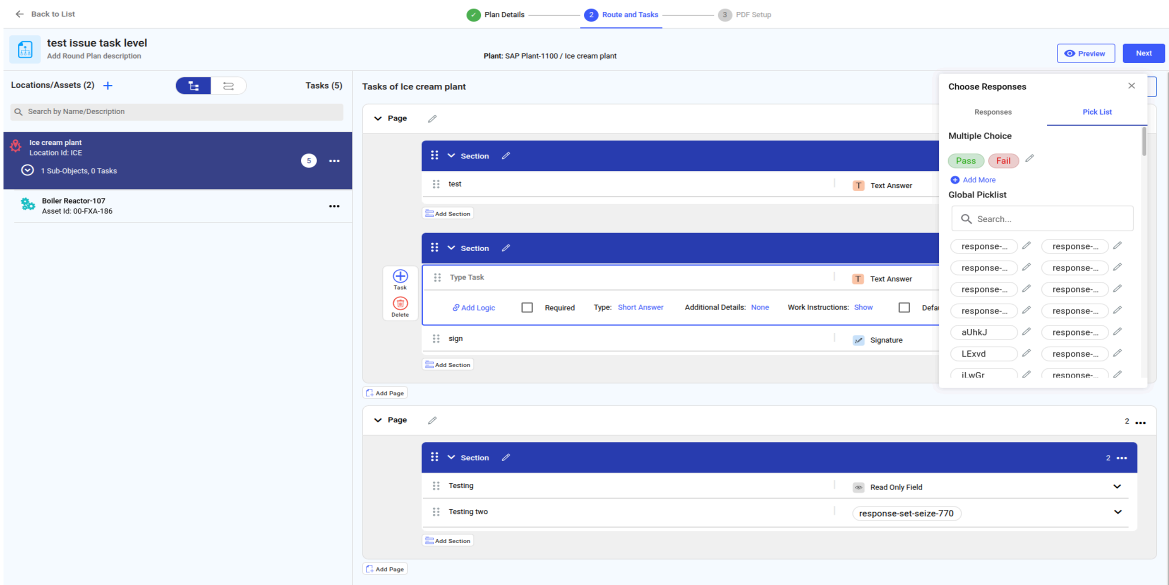
Figure 6-15 Global Picklist Response Type



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

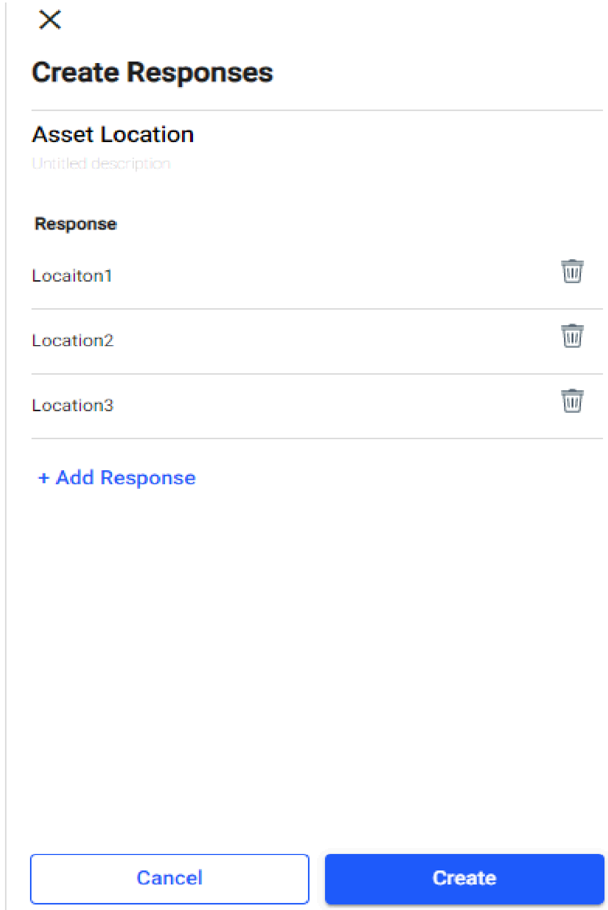
> **Note:**
> Enter the item name in the **Search bar** to quickly find and add it to the picklist.

Figure 6-16 Global Picklist



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

Figure 6-17 Global Picklist Add More



7. Click **Create**.

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

6.1.15. Signature

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

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

To add signature response type:

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

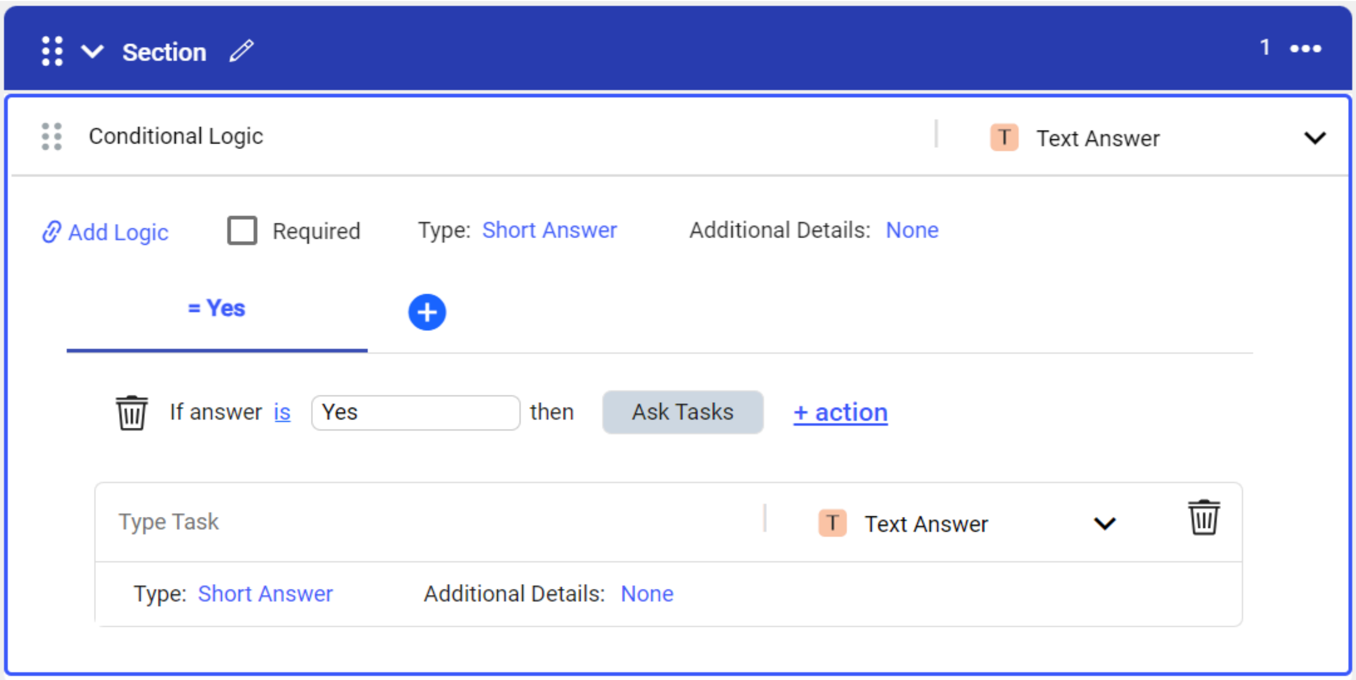
6.1.16. Conditional Logic

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

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

You can add logic for the following response types.

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



Add conditional logic: by following detailed example:

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

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

6.2. Create a Round Plan and Publish

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

To create a round plan:

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

   Or

   Click ••• select **Download Excel Template**.

   Fill the details in the template.

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

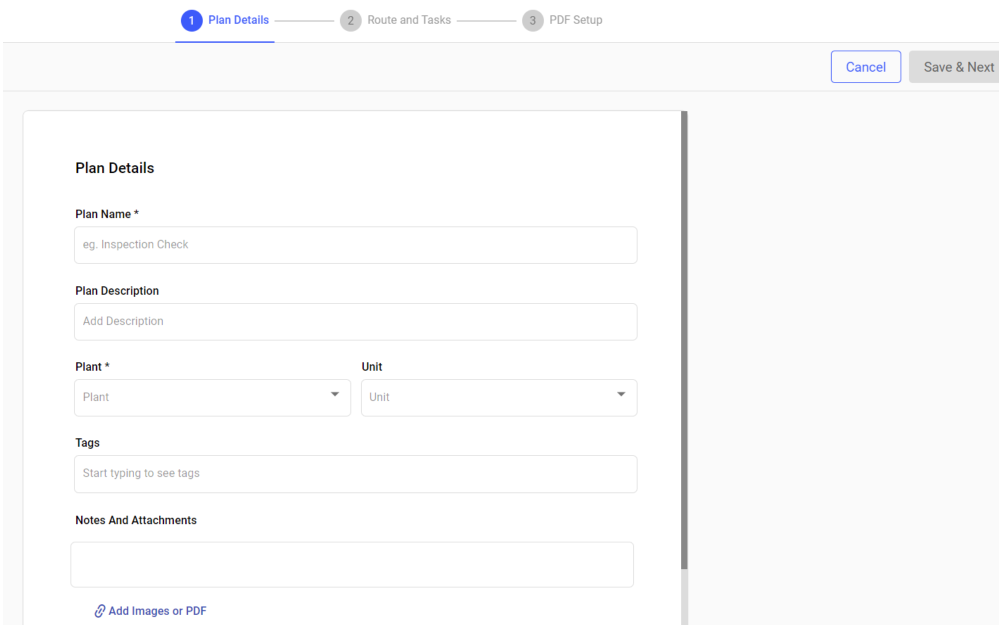
   The round plans are uploaded, and you can see them in the **Round Plans** screen with Draft status.

   Open the round plan.

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

   The **Plan Details** screen is displayed.

Figure 6-18 Fill Plan Details



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

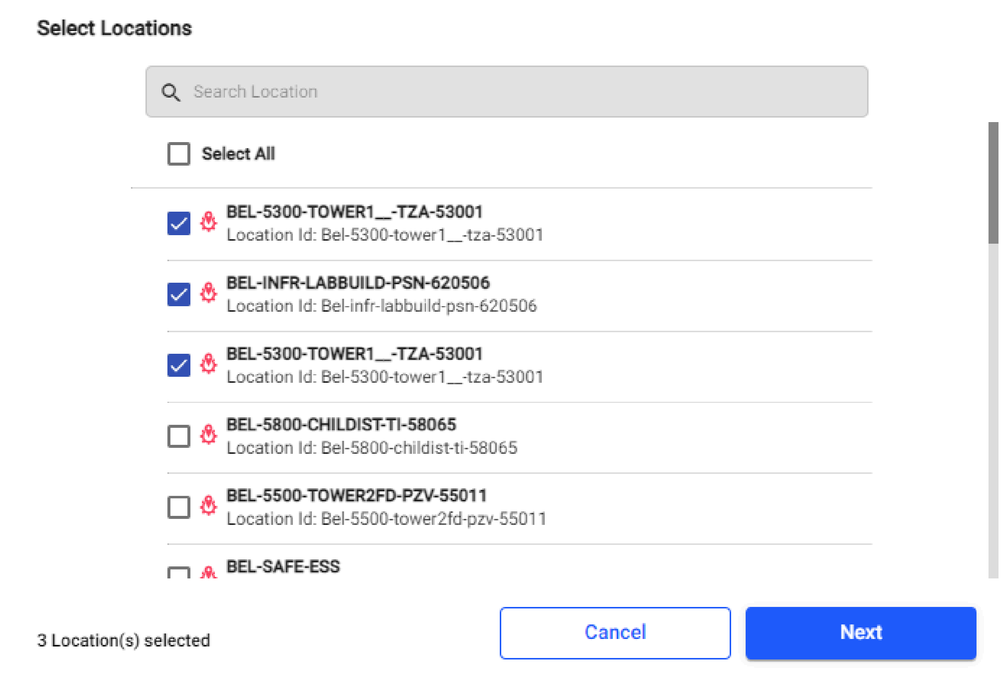
Table 6-1 Plan Details Screen Fields

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

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

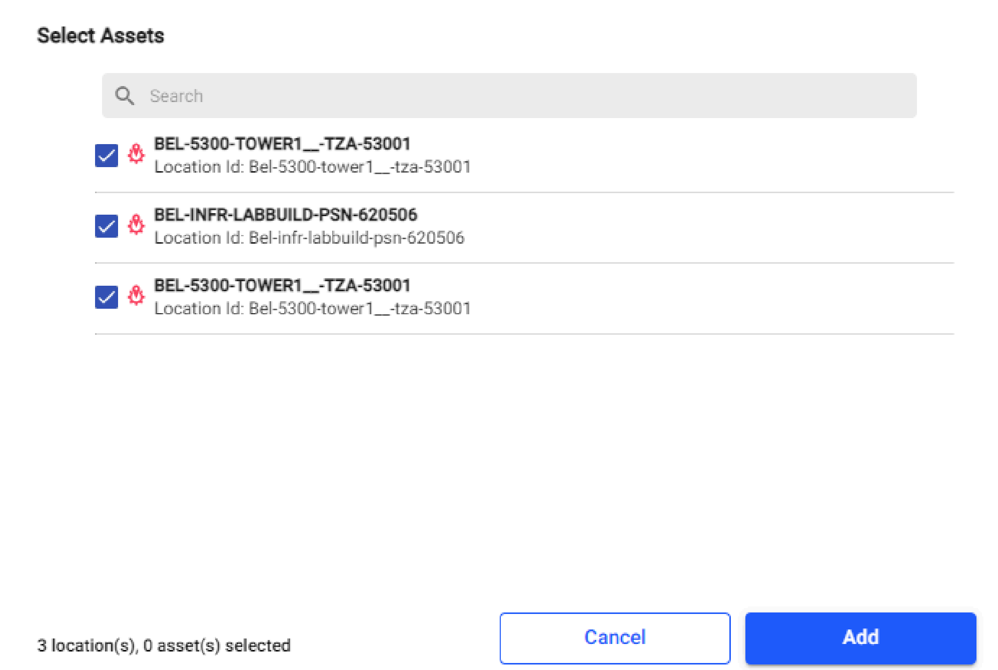
4. Click **Save & Next**.
5. In the **Select Locations** window, select locations and click **Next**.

Figure 6-19 Select Locations



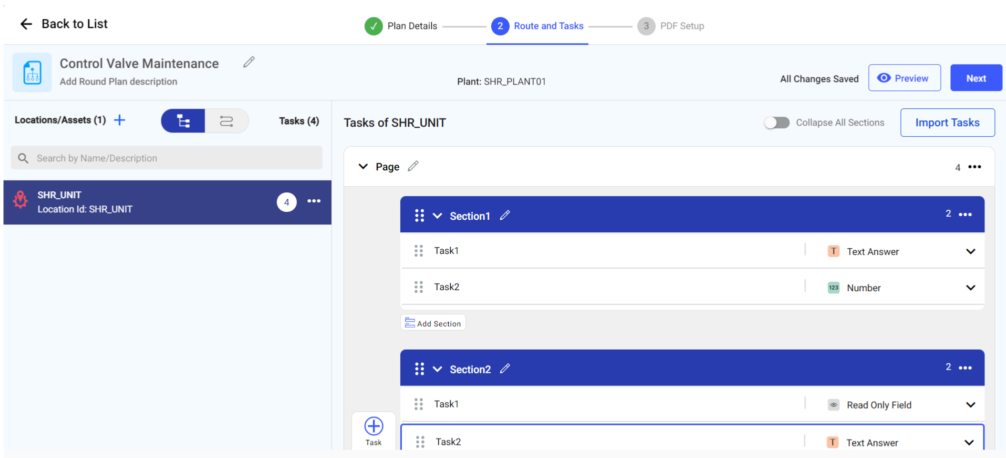
6. In the **Select Assets** window, select assets and click **Add**.

Figure 6-20 Select Assets



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

Figure 6-21 Location and Asset Hierarchy



> **Note:**
> When you select locations and assets, the application automatically pulls stores, and synchronizes asset and location metadata (such as asset codes, locations, and specifications) from SAP/ERP. The system displays this information at the task level during round plan creation.

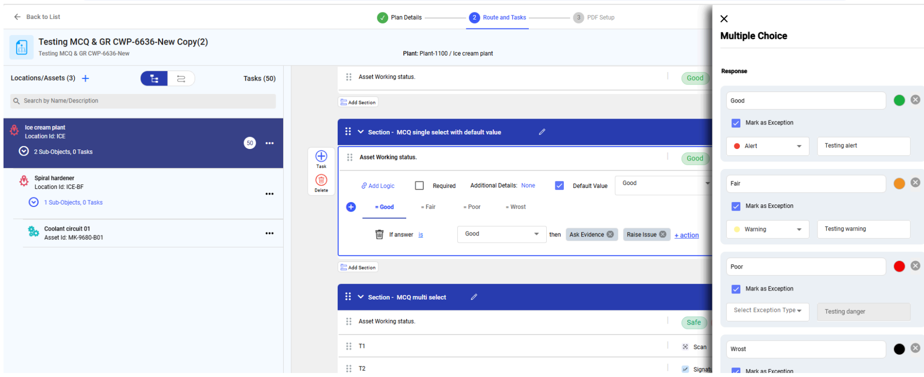
7. In the **Route and Tasks** screen, select the location or asset on the left side, create a round plan with multiple sections, add tasks and response types for the selected location or asset:
   - To add locations and assets from the left side pane click the Add Locations/ Assets + icon. You can drag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

- To add task, click the **Task** ⊕ button inside the section. When you click the button, the screen displays the following options,
  - **Type Task**: Enter the task in the text box.
  - **Responses**: Select the relevant response type from the drop-down. For information about each response type, see Understanding Response Types Used for Creating Round Tasks *(on page 71)*.
  - **Add Logic**: Click **Add Logic** to create a logical question along with actions. This logical question is more likely of multiple-choice responses like Yes or No. For more information, see Conditional Logic *(on page 96)*.
  - **Required**: Select the check box to make the question mandatory to fill.
  - **History**: Select the check box to see the last five transactions. This option is available only for Number and Slider response types.
  - **Additional Details**: Click **Add** to add additional details for the task. In the Additional Details window, add Tags, and Attributes (Labels and Values).

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

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

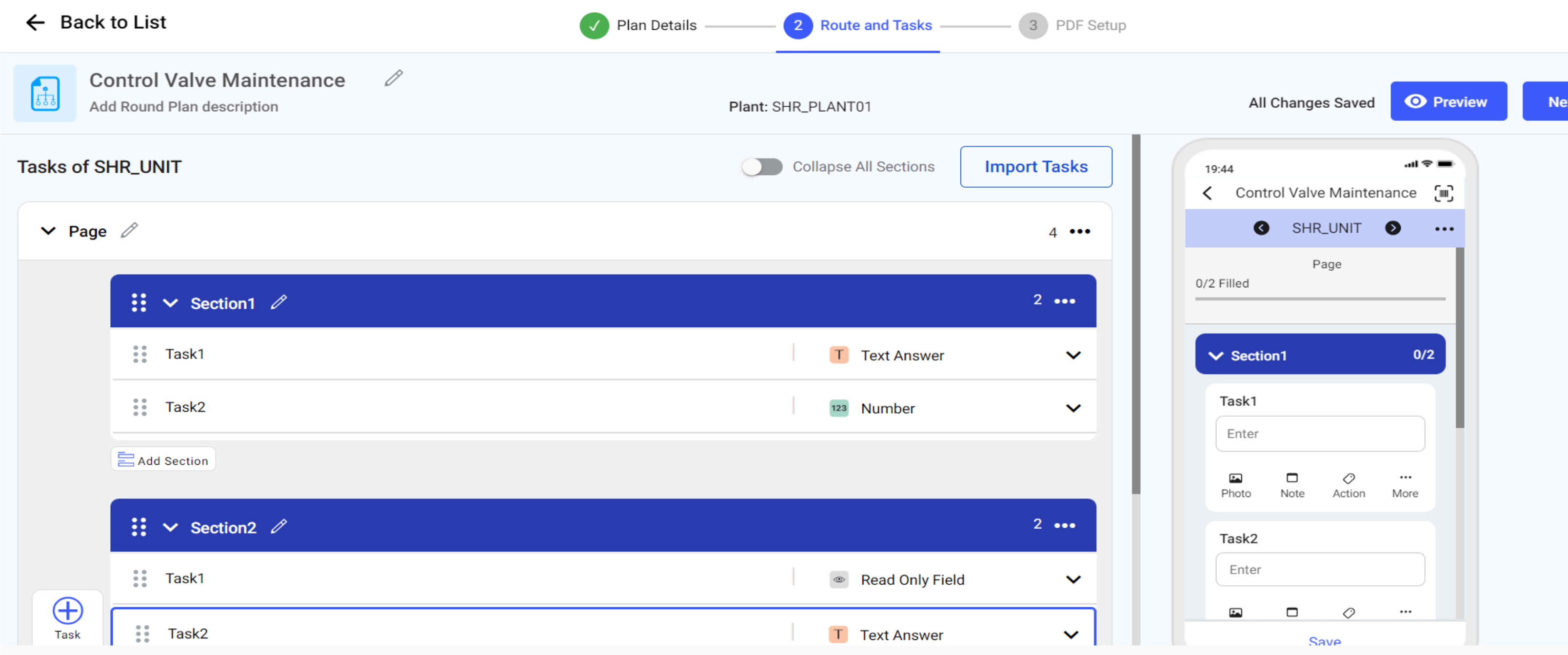
Figure 6-22 Respose Type Exceptions



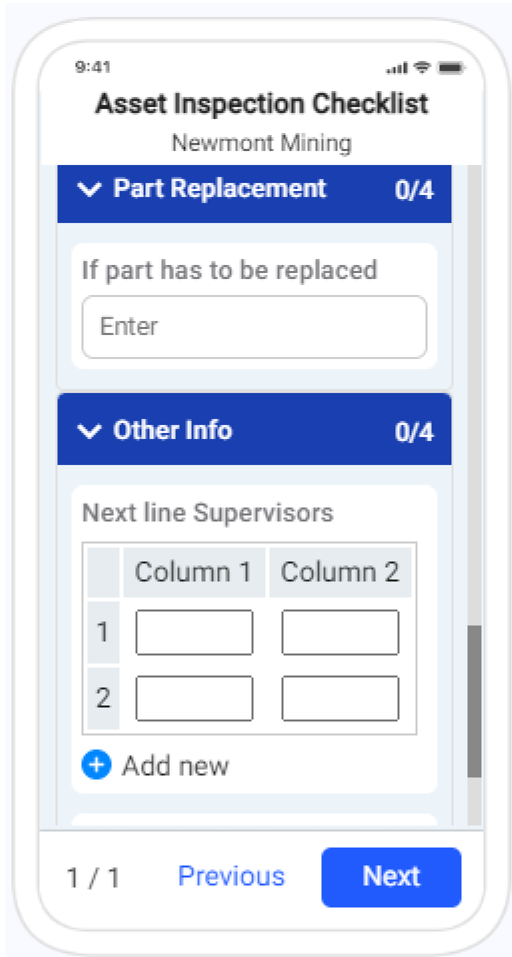
- You can import sections and tasks from the template to create a round plan quickly. For more information, see Import Round Plans from Template *(on page 113)*.
- You can use predefined Excel templates to bulk upload multiple Round Plans or Form Templates simultaneously, or export them individually or in bulk using the same standardized Excel format structure.

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

Figure 6-23 Round Plan Preview



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



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

Figure 6-24 Round Plan PDF Format

In the **PDF Setup** screen, you can configure the PDF as needed. For more information, see Configure Round Plan Details PDF *(on page 117)*.

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

    Or

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

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

6.2.1. Manage Round Plans

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

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

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

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

6.2.1.1. Manage Tasks in a Round Plan

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

Copy to All Locations and Assets

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

Copy to Custom Locations & Assets

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

Other Task Actions

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

6.2.1.2. Manage Sections in a Round Plan

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

Adding and Copying Sections

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

Section Linking and Deletion

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

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

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

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

Additional Section Information

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

6.2.1.3. Manage Pages in a Round Plan

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

Adding and Copying Pages

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

Deleting Pages

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

6.2.2. Example of Round Plan Creation

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

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

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

6.2.3. Import Round Plans from Template

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

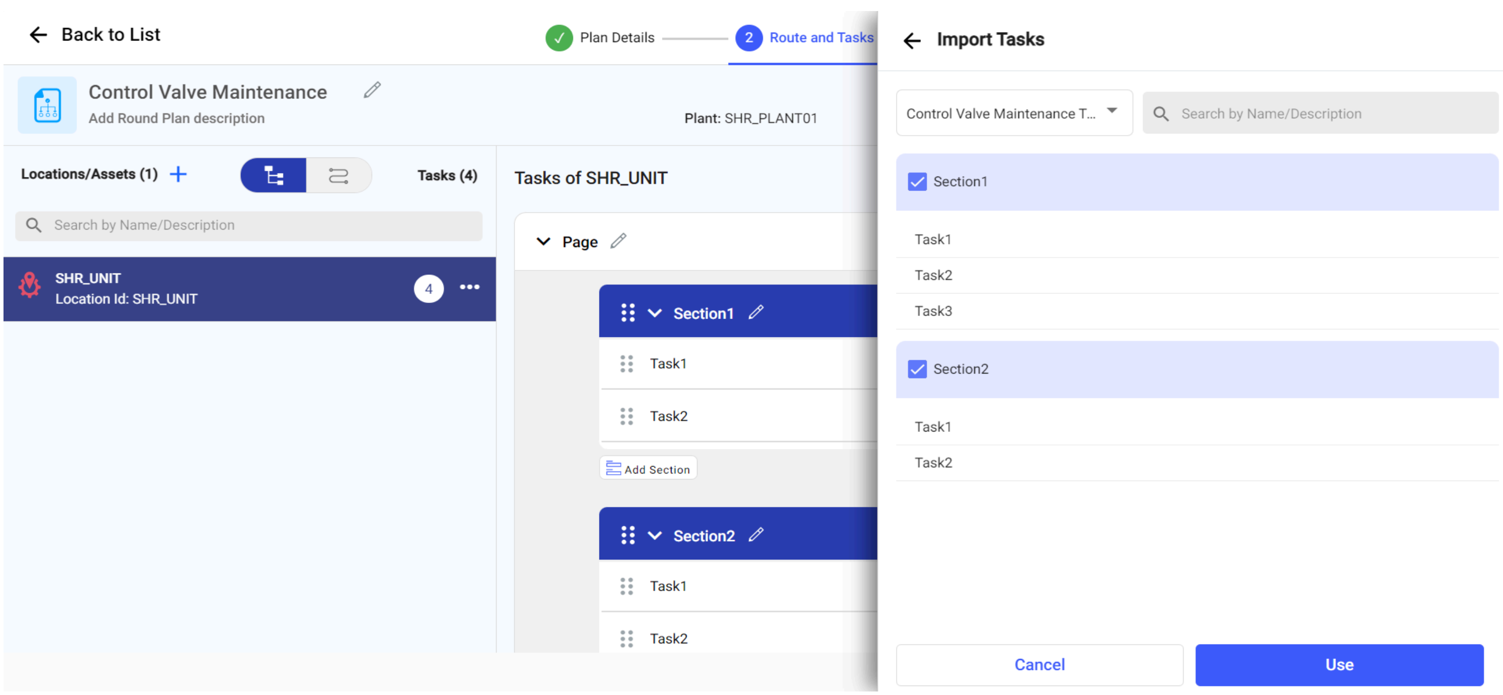
To import sections and tasks from the template:

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

   or

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

Figure 6-25 Import Tasks



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

9. Select the whole section with tasks and click **Use**.
10. You can view two options:
    a. **Move:**
        i. Select this option to import the sections or tasks. The selected tasks, or sections are moved from the source round plan to the target round plan.
        ii. Choose the **Existing Page** or **New Page** option.
        iii. Click **Move**.
    b. **Copy:**
        i. Select this option to copy the sections or tasks from the round plan while keeping them in the original source.
        ii. Choose the **Existing Page** or **New Page** option.
        iii. Click **Import**.

6.2.4. Create Round Plans from Existing Ones

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

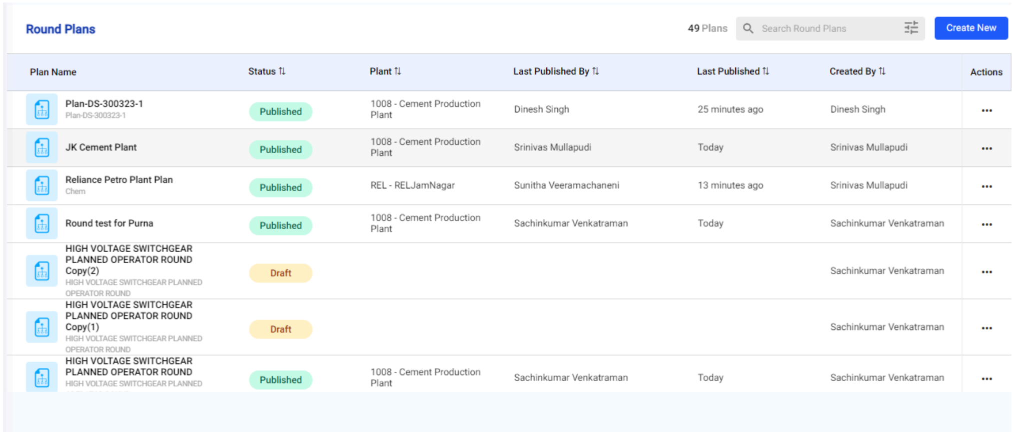
To copy an existing round plan and create a new one:

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

   The **Round Plans** screen with the list of draft and published round plans is displayed.
2. Click ••• and select **Copy** for the selected round plan.

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

Figure 6-26 Copied Round



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

   Or

   Double-click the round to open the edit screen.
4. Update or modify the tasks and other details as required and publish. For information, see Modify Round Plans *(on page 115)*.

6.2.5. Modify Round Plans

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

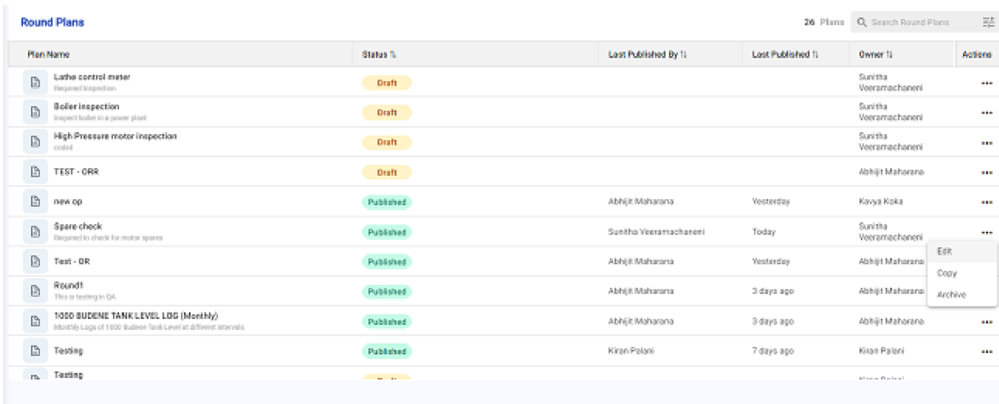
To edit a round plan:

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

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

2. Click the More ••• icon > Edit for the selected round plan.

   Figure 6-27 Edit Rounds

3. Update the round plan details as required.
4. When you modify a round plan, the changes are saved as a draft, creating a new version of the round plan.
5. Enforce asset scanning by choosing the **Enable Barcode Scanning** option.
6. Click **Publish** to re-publish the round.

6.2.6. Create an Ad-Hoc Round

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

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

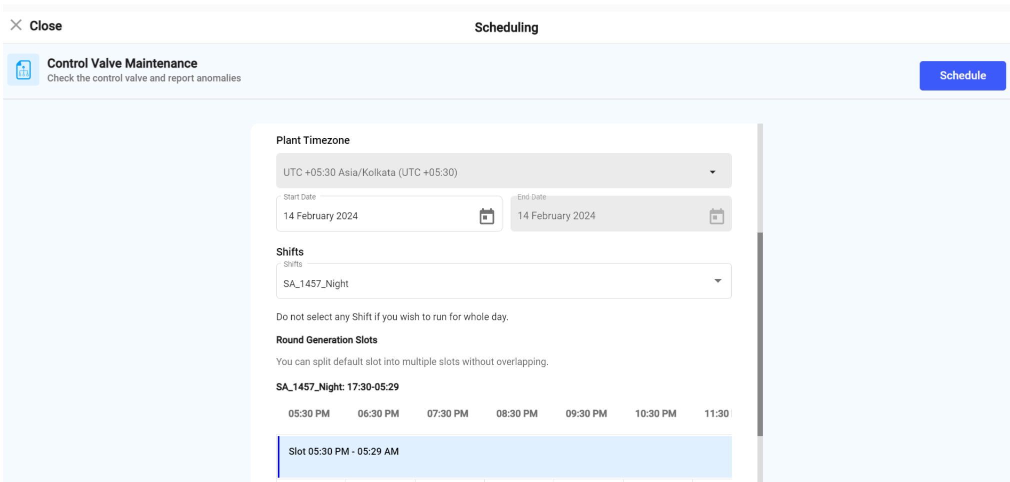
To generate an ad-hoc round in the web app:

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

   Tip:

If you set the Due Date more than 24 hours out, the ad-hoc round carries over to next shifts automatically and remains available until it is submitted or becomes overdue.

Figure 6-28 Create Ad Hoc Round



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

4. Click **Schedule**.

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

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

6.2.7. Configure Round Plan Details PDF

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

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

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

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

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

6.3. Review and Approve Round Plans

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

This topic contains the following sub topics:

- Review and Approve Round Plan to Publish *(on page 119)*
- Create a Custom Workflow *(on page 120)*
- Maintain Approval Audit Trail *(on page 122)*

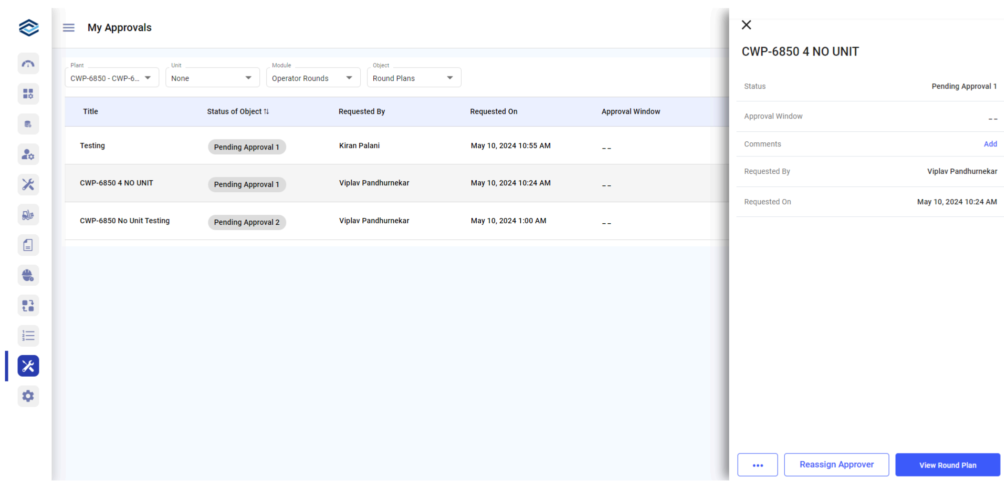
6.3.1. Review and Approve Round Plan to Publish

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

To approve round plan request for publishing:

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

   Figure 6-29 Approve Round Plan

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

   Or

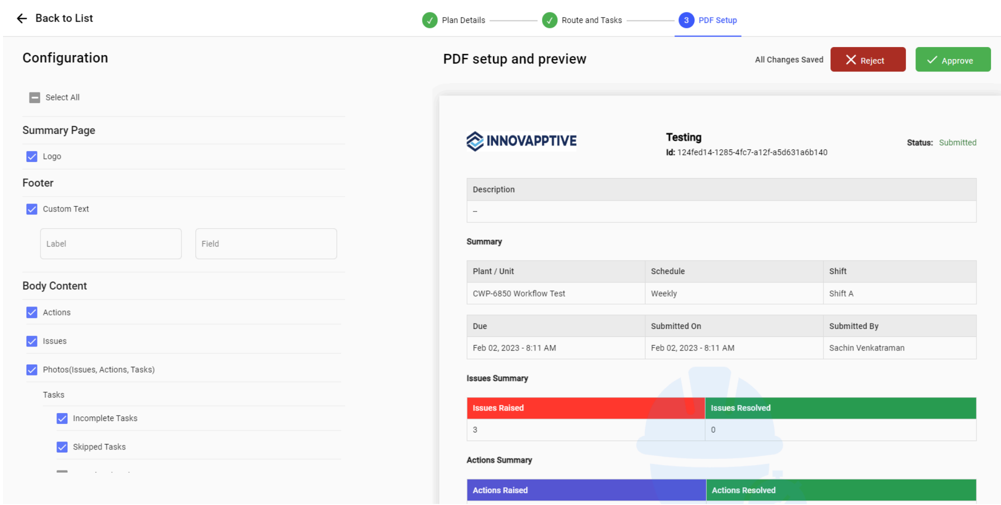
   Click **View Round Plan** to view the round plan details.

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

Click **Next**.

Click **Approve**.

Figure 6-30 Approve



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

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

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

6.3.2. Create a Custom Workflow

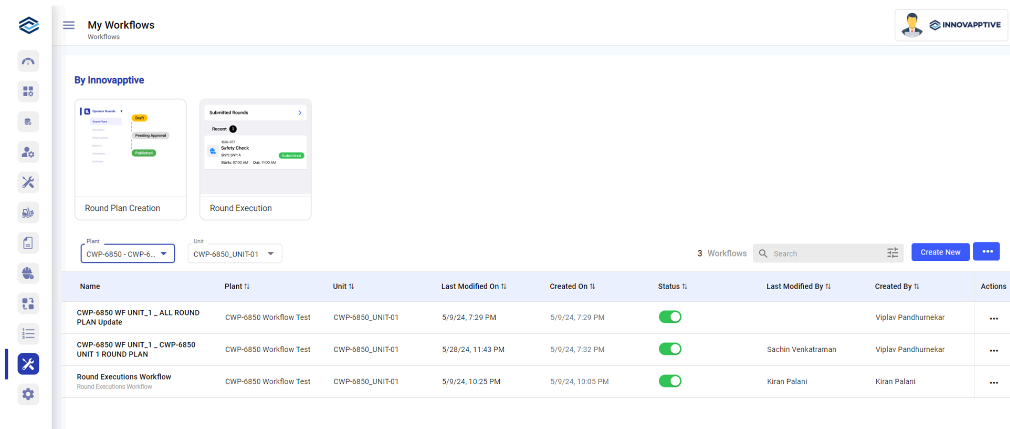
This section allows you to create and configure custom approval workflow for equipment inspections tailored to the specific needs of a plant.

To create a workflow:

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

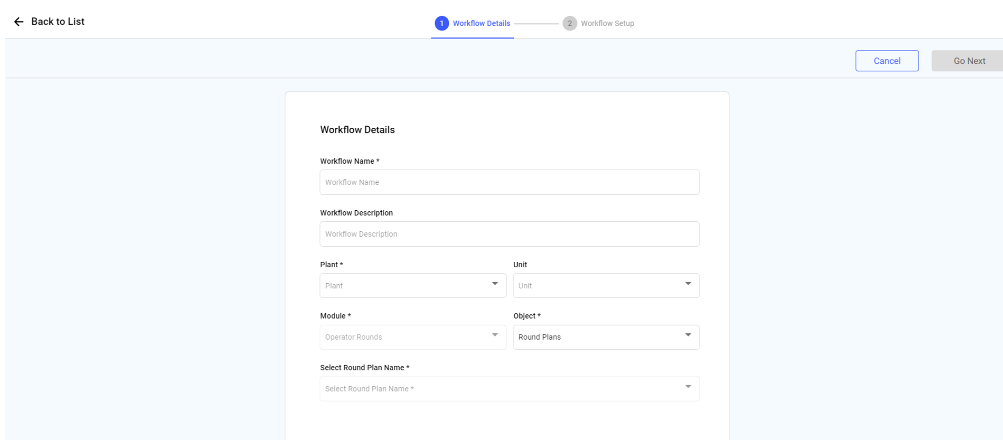
   The list of predefined workflows is displayed.

Figure 6-31 My Workflows



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

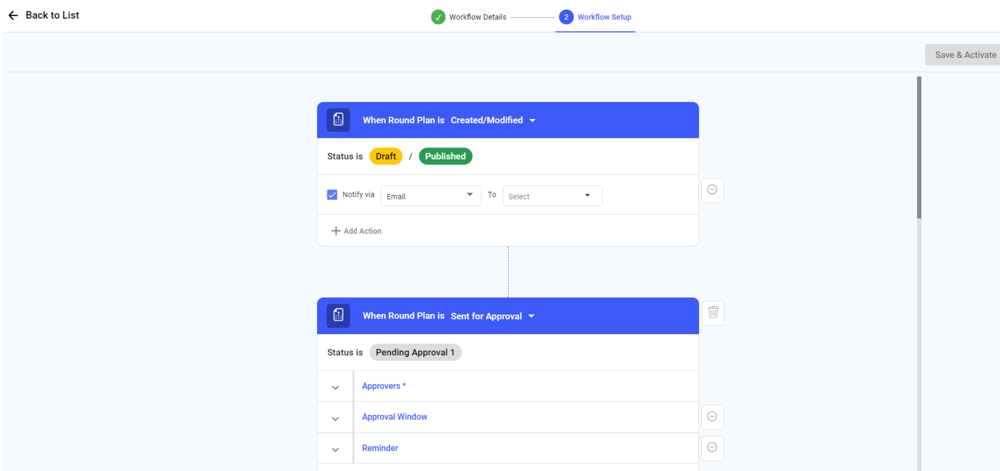
Figure 6-32 Workflow Details Screen



   a. Enter the workflow name in the **Workflow Name** field.
   b. Enter the description in the **Workflow Description** field.
   c. Select **Plant**, **Unit**, **Module**, and **Object** from the list.
   d. Select a round plan from the **Select Round Plan Name** list.

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

Figure 6-33 Workflow Setup Screen



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

   The workflow is created.

6.3.3. Maintain Approval Audit Trail

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

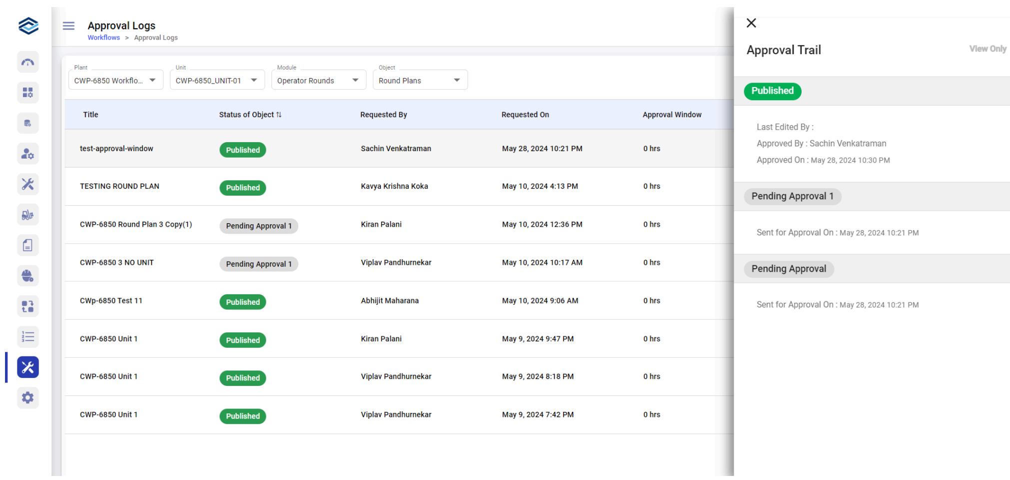
To view the approval logs:

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

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

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

   Figure 6-34 Approval Logs Screen



6.4. Schedule Round Plans

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

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

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

Published round has the following status:

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

6.4.1. Schedule Round Plans by Frequency

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

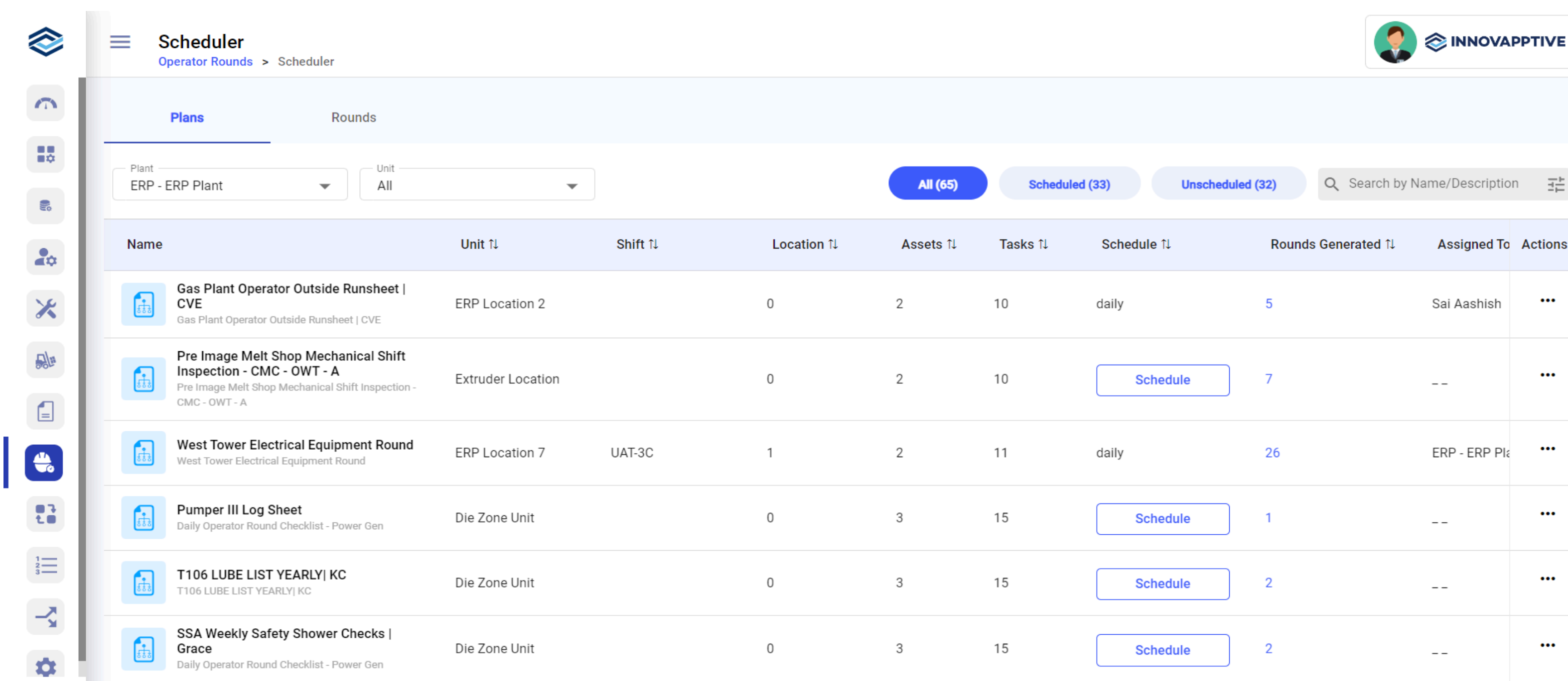
To schedule rounds by frequency:

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

   Or

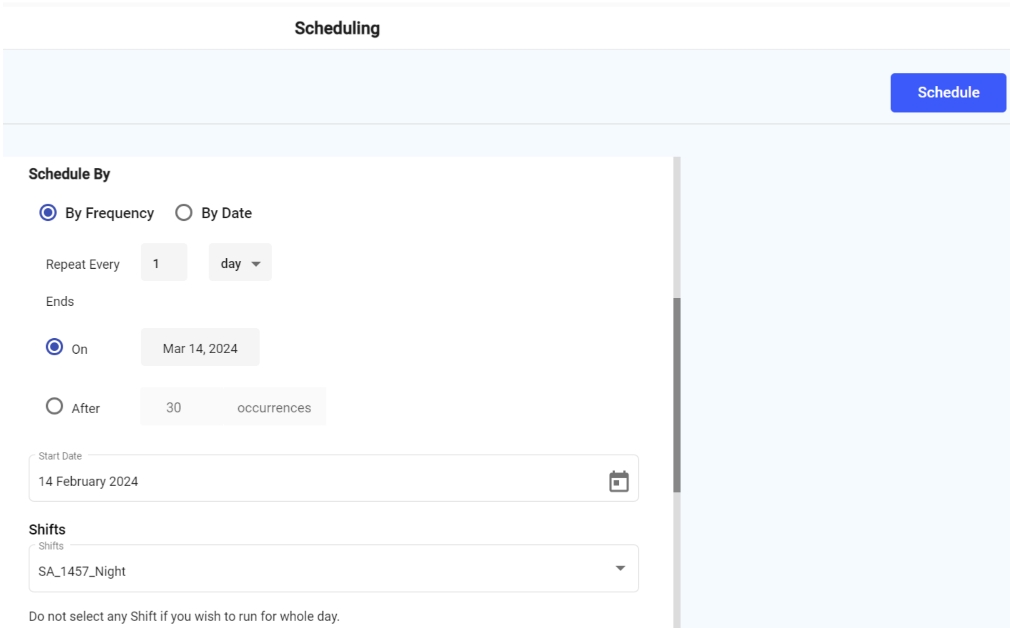
   Click ••• and select **Schedule** > **Header Level** for the selected round plan that you want to schedule.

   Figure 6-35 Schedule Rounds Screen

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

Figure 6-36 Schedule Rounds by Frequency



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

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

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

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

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

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

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

9. Select slots for the selected shift.

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

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

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

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

    Or

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

    Or

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

Or

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

Or

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

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

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

14. Click **Schedule**.

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

6.4.2. Schedule Round Plans by Specific Date

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

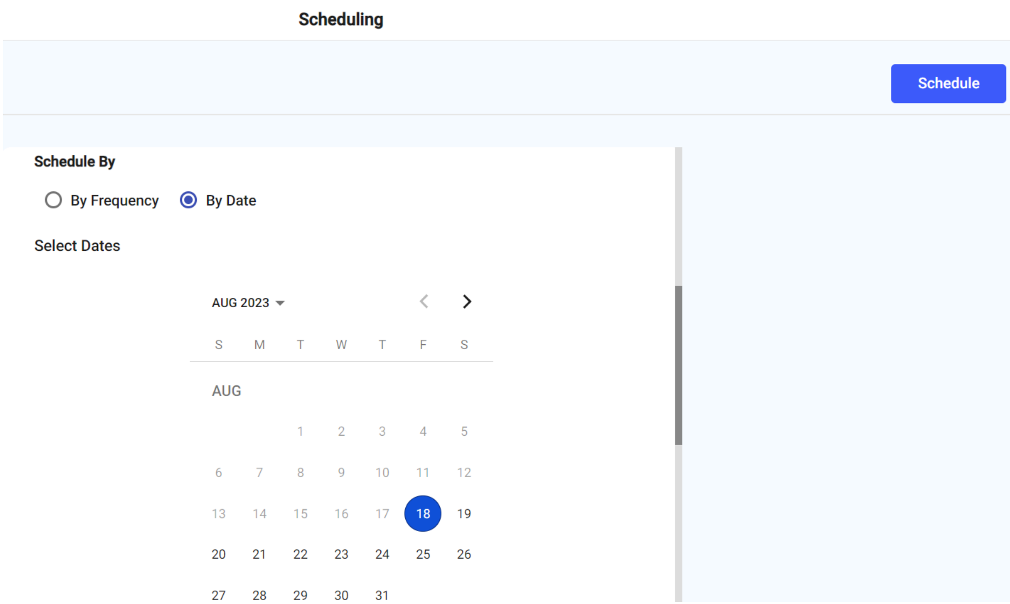
To schedule rounds by date:

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

   Or

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

   Figure 6-37 Schedule Rounds by Date

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

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

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

Or

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

Or

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

Or

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

Or

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

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

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

6.4.3. Schedule Rounds at Task Level

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

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

To schedule a round at task level:

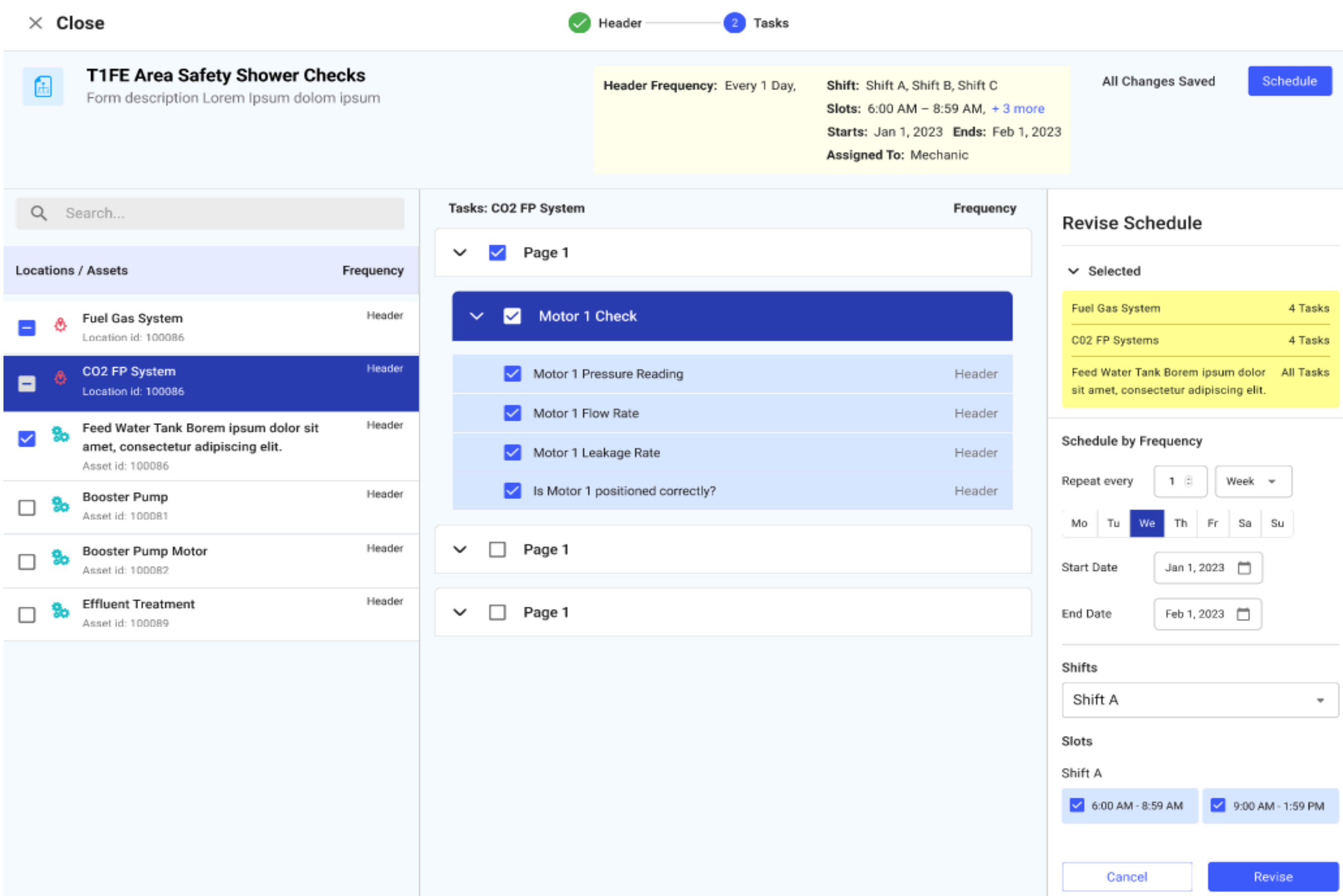
1. Expand the **Operator Rounds** module and click **Scheduler** on the left-side pane.
2. In the **Plans** tab, click **Schedule** on the round plan and select **Task Level**.

   Or

   Click ••• adjacent to the round plan that you want to schedule and select **Schedule** > **Task Level**.
3. In the **Header** screen, fill the details. For more information, see Schedule Round Plans by Frequency *(on page 124)* and Schedule Round Plans by Specific Date *(on page 127)*.
4. Select the Allow Buffer Time check box to add buffer time for round execution at the task level.
   a. Select and enter the buffer time to the planned start time.
   b. Select and enter the buffer time to the planned end time.

   Tip: Sometimes, tasks can take more time to be completed. When you add a buffer time, the round will not become overdue and helps operators complete the assignment without worrying about timelines for critical tasks. Depending on the complexity of the task you can add buffer time between 30 mts to 1 hour or more
5. Click **Next** on top right.
6. In the **Tasks** screen,
   a. Select the location or asset in the **Locations / Assets** section on the left side.
   b. Select the tasks or whole section in the middle section.
   c. Fill the details in the **Revise Schedule** section on the right side.
   d. Click **Revise**.

Figure 6-38 Scheduling at Task Level



A message "Schedule Revised Successfully" appears.

7. Click **Schedule** on top right.

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

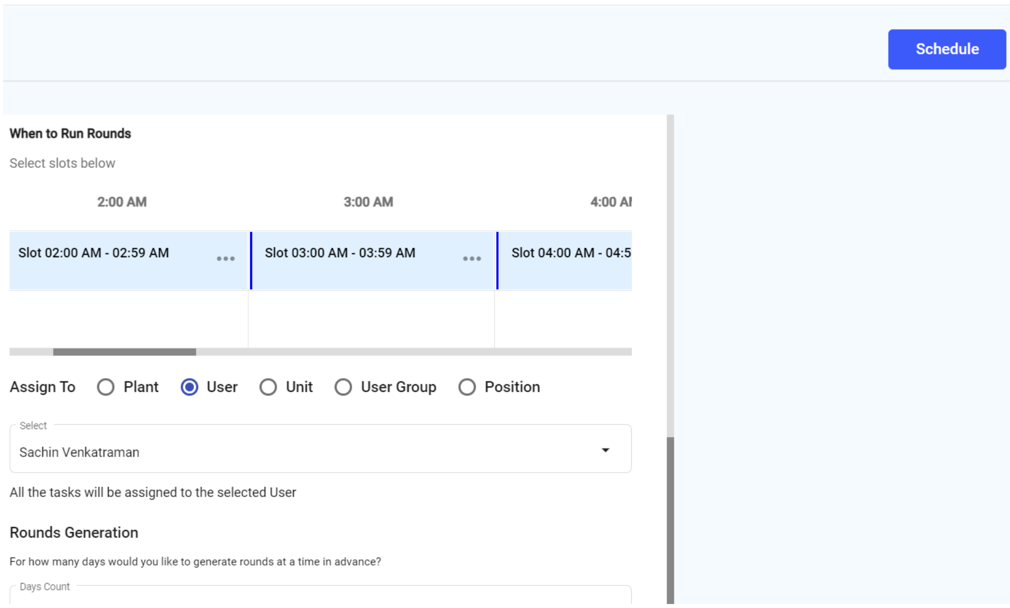
6.4.4. Modify Scheduled Round Plans

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

To modify the schedule of a round:

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

Figure 6-39 Modify Schedule



7. View Round Plans and Submitted Rounds

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

This topic contains the following sub topics,

- View Round Plans and Plan Details *(on page 133)*
- View Submitted Rounds *(on page 134)*

7.1. View Round Plans and Plan Details

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

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

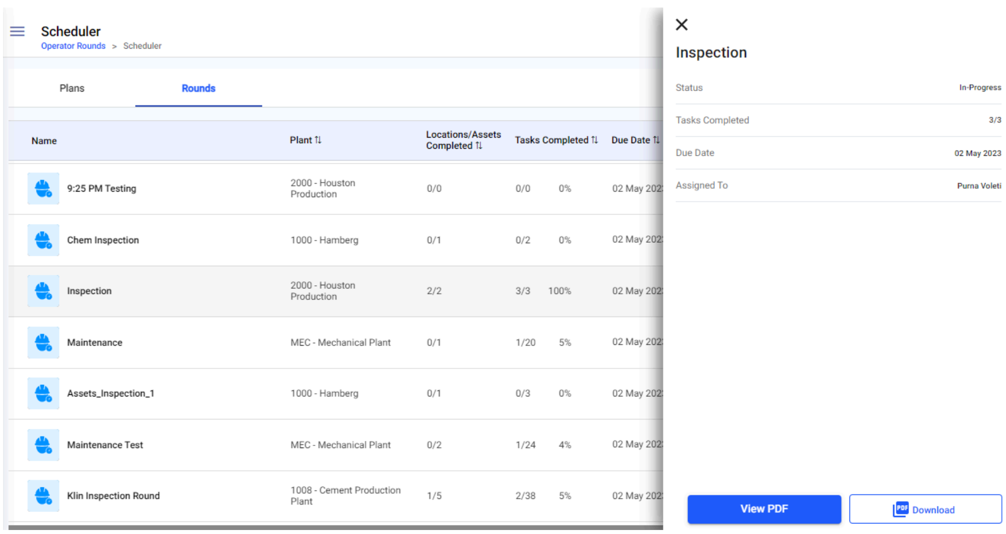
To view round plans list and round plan details:

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

4. Click ••• and select **Show Details** for the scheduled round to view.
   You can view the round details on the right side. Click **View PDF** to view the details in PDF or click **Download** to download the details in PDF format. You can also click the links inside the PDF to view and download the attachments like videos, audio, and documents. For more information, see Configure Round Plan Details PDF *(on page 117)*.

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

   Figure 7-1 View Round Details

7.2. View Submitted Rounds

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

Scheduled rounds have the following status:

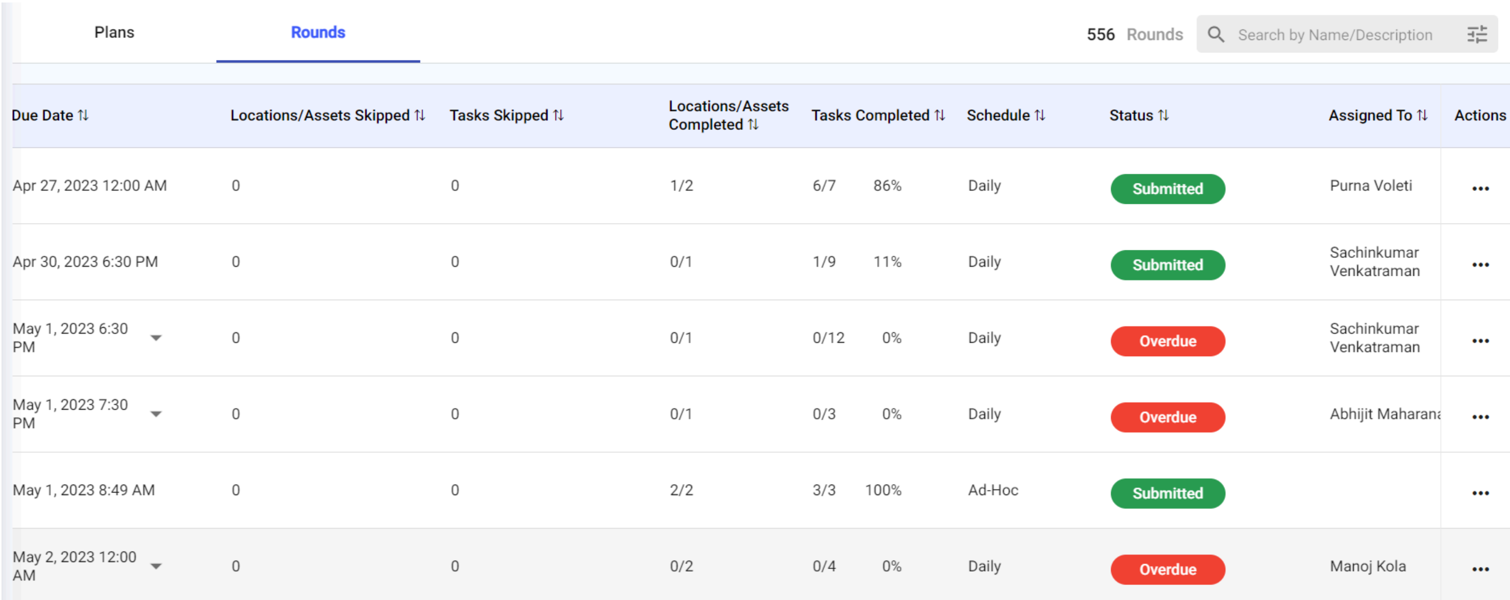
- **Open**: Round is scheduled but not assigned to an operator or round is assigned to the operator but the operator unassigned it without any progress.
- **Assigned**: Round is scheduled and assigned to an operator, but the Operator has not started the task yet.
- **In Progress**: Operator started the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

To view the status of rounds:

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

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

Figure 7-2 Scheduled Rounds



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

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

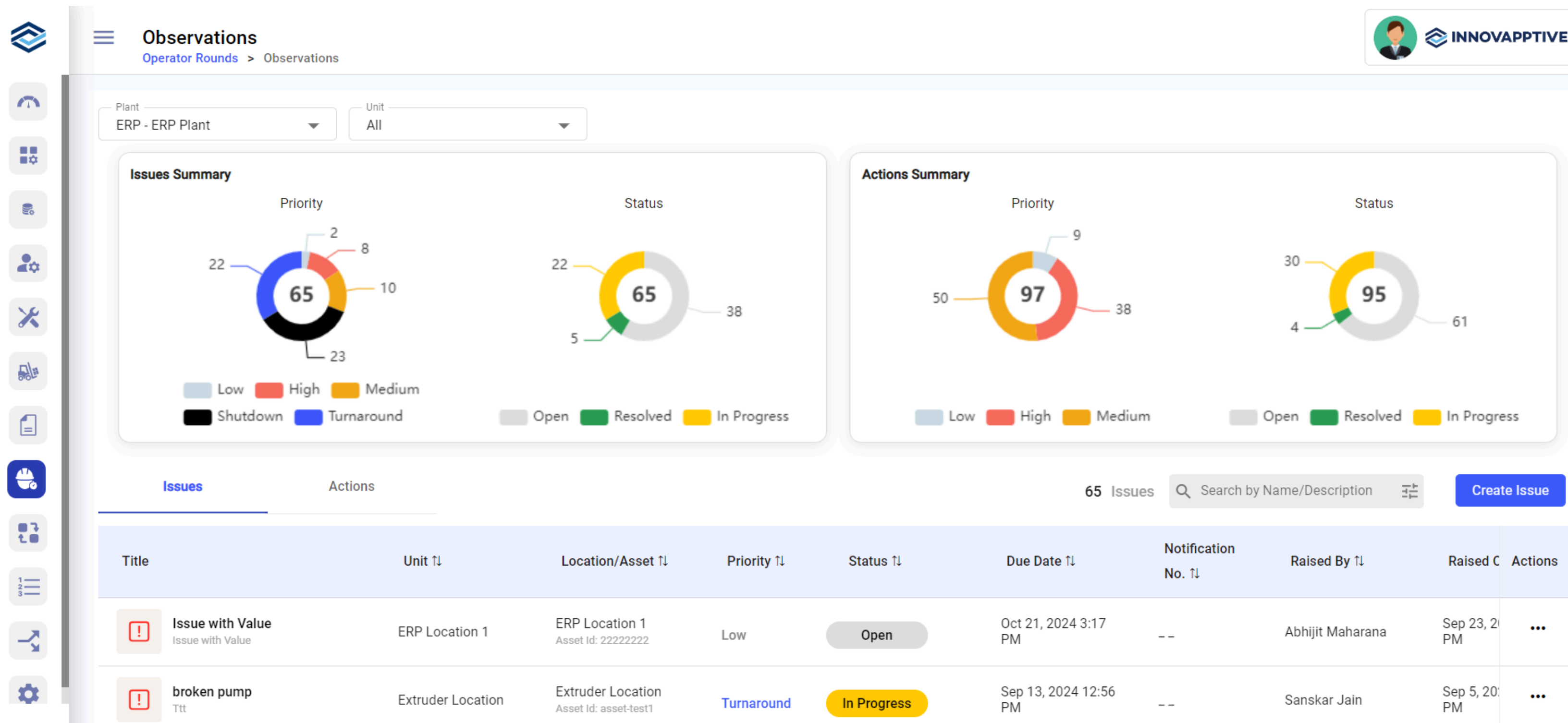
   You can view the round details such as Summary, Observations, Notes, and Tasks. Click Download as PDF to download the details in PDF format.

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

8. Create and Manage Issues

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

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



8.1. Configure an Issue

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

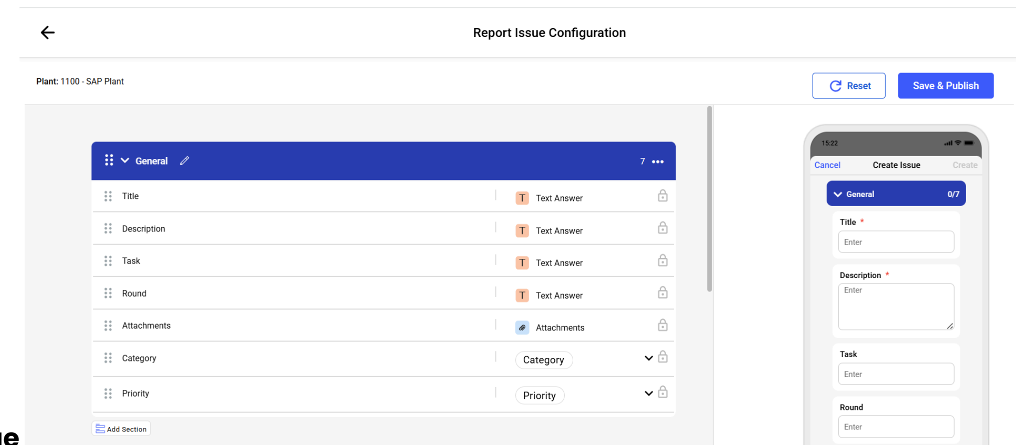
- **Custom fields** to capture plant-specific data
- **Default values** to standardize entries
- **Help texts** to guide end users
- **Auto-fill conditions** to speed up data entry and reduce errors.

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

To configure an issue:

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

Configure an



Issue

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

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

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

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

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

6. Click **Save & Publish**.

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

8.2. Create an Issue

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

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

To create an issue:

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

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

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

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

f. Select the **Plant**, **Unit**, **Functional Location**, and **Asset** values from the respective dropdowns.

g. In the **Assigned To** to drop-down,
   - Choose **User** and select the user from the drop-down.
   - or
   - Choose **User Group** and select the user group from the drop-down.

h. Select **Start Date** and **Time**.

i. Select **Due Date** and **Time**.

j. Select the **Status** as **Open**, **In-Progress**, **Resolved**, or **Un Resolved**.

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

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

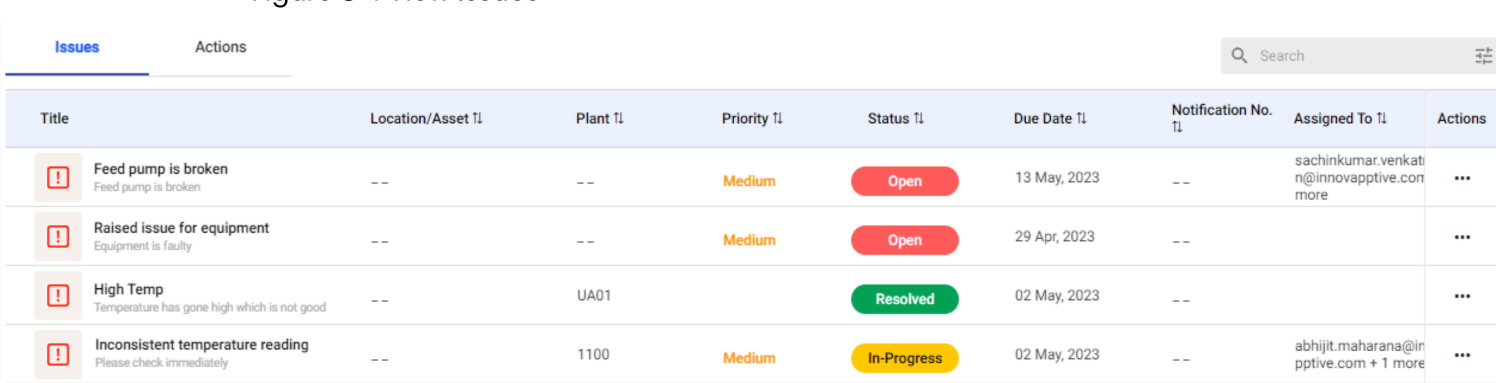
8.3. Track Ongoing Issues

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

To track issues:

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

Figure 8-1 View Issues

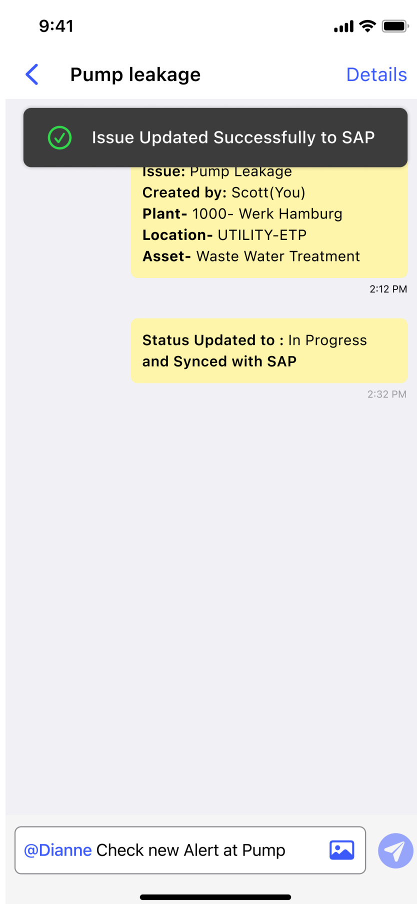

Issues
Actions
Search

Title	Location/Asset	Plant	Priority	Status	Due Date	Notification No.	Assigned To	Actions
Feed pump is broken Feed pump is broken	--	--	Medium	Open	13 May, 2023	--	sachinkumar.venkati n@innovapptive.com more	•••
Raised issue for equipment Equipment is faulty	--	--	Medium	Open	29 Apr, 2023	--		•••
High Temp Temperature has gone high which is not good	--	UA01		Resolved	02 May, 2023	--		•••
Inconsistent temperature reading Please check immediately	--	1100	Medium	In-Progress	02 May, 2023	--	abhijit.maharana@in pptive.com + 1 more	•••

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

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

Figure 8-2 SAP Notification



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

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

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

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

8.4. Update and Close an Issue

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

To update and close issues:

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

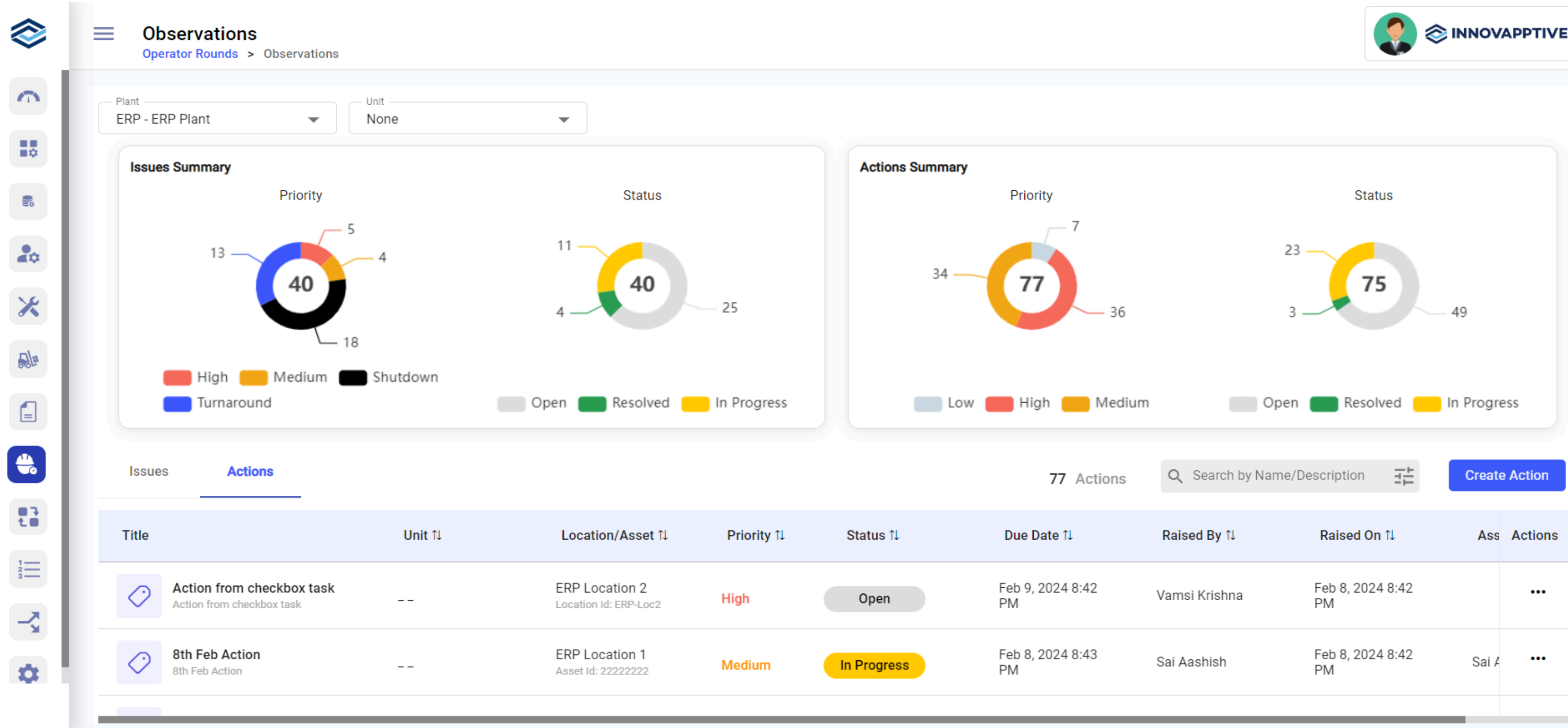
   Or

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

9. Create and Manage Actions

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

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



9.1. Create an Action

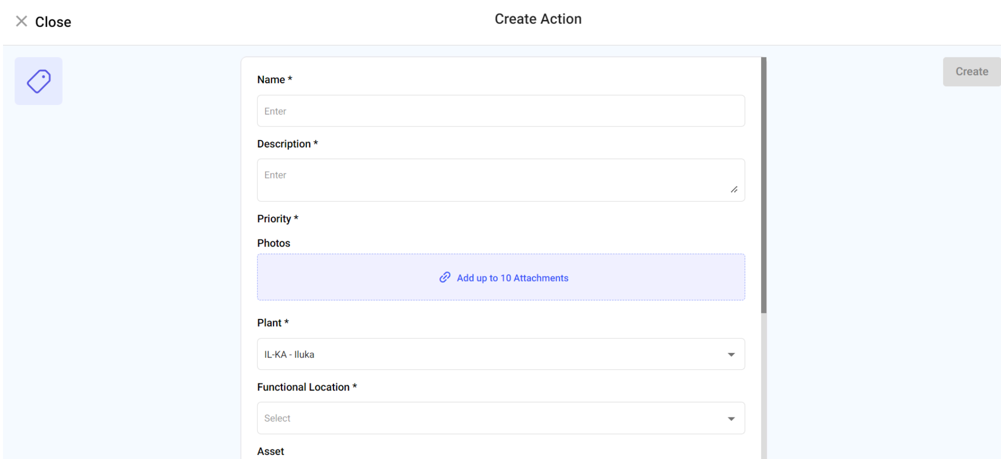
You can create actions to initiate follow-up tasks based on the results of a round or inspection from the web application.

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

To create an action:

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

Figure 9-1 Create Action



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

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

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

9.2. Monitor Actions

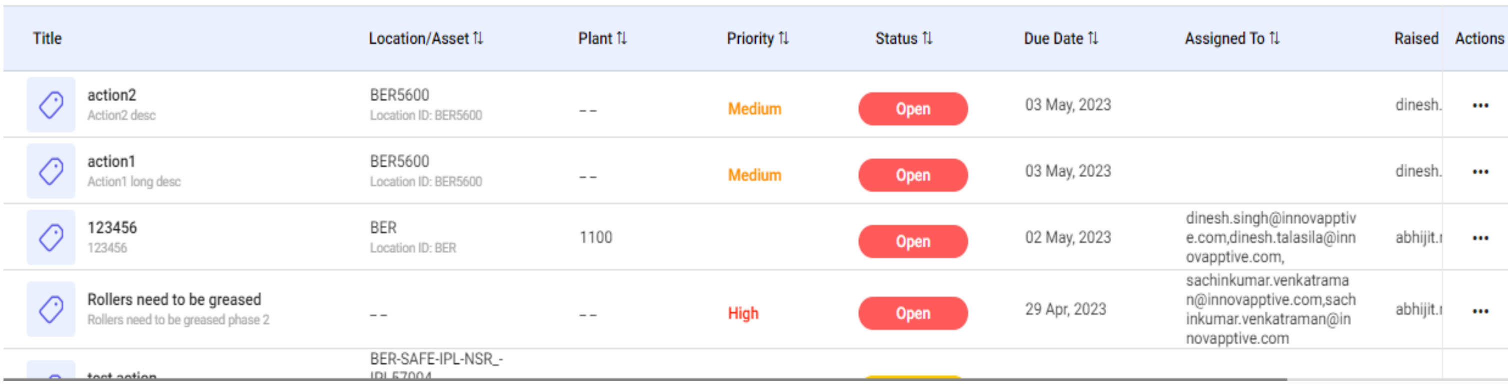
The Actions tab displays follow-up actions raised by the Operators.

To view open actions:

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

   You can view the list of actions.

Figure 9-2 View Actions



Title	Location/Asset	Plant	Priority	Status	Due Date	Assigned To	Raised	Actions
action2 Action2 desc	BER5600 Location ID: BER5600	--	Medium	Open	03 May, 2023		dinesh.	•••
action1 Action1 long desc	BER5600 Location ID: BER5600	--	Medium	Open	03 May, 2023		dinesh.	•••
123456 123456	BER Location ID: BER	1100		Open	02 May, 2023	dinesh.singh@innovapptiv e.com,dinesh.talasila@inn ovapptive.com,	abhijit.r	•••
Rollers need to be greased Rollers need to be greased phase 2	--	--	High	Open	29 Apr, 2023	sachinkumar.venkatrama n@innovapptive.com,sach inkumar.venkatraman@in novapptive.com	abhijit.r	•••
test action	BER-SAFE-IPL-NSR_-							

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

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

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

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

9.3. Update and Close an Action

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

To close actions:

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

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

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

   Or

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

10. Create ERP Notification for an Asset

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

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

To create a notification for an asset:

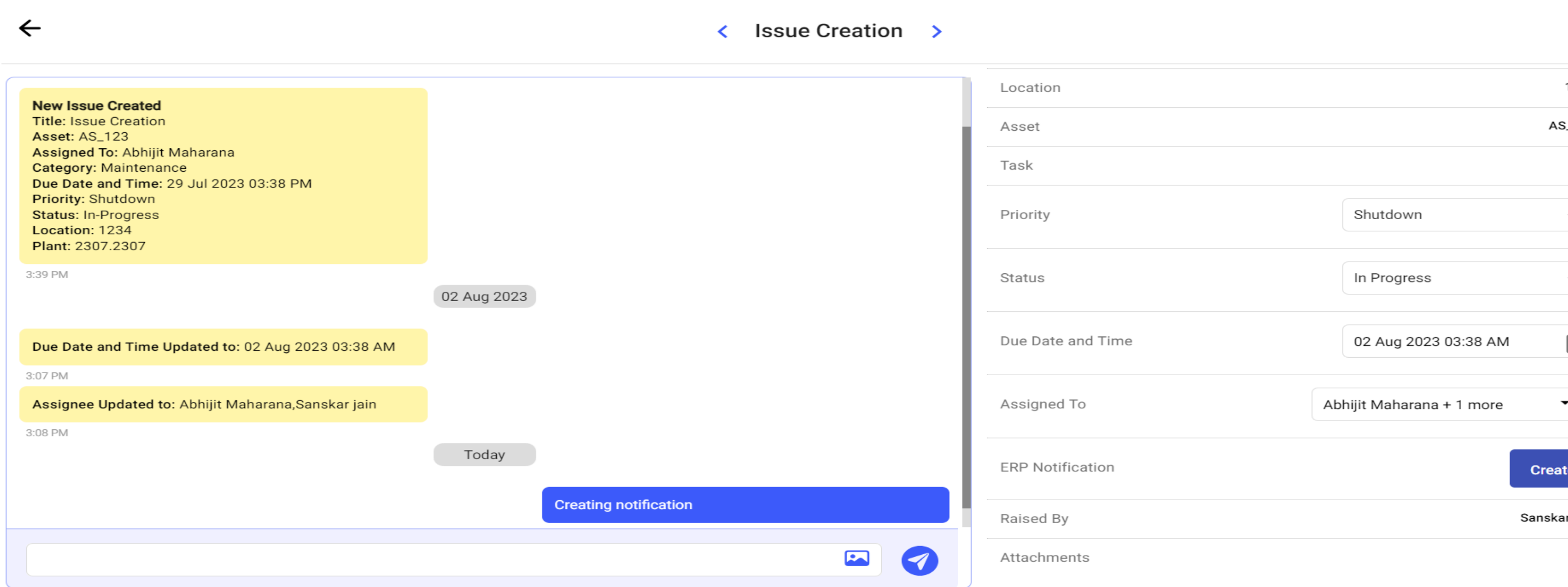
1. Click the **Observations** section on the left-side pane.
2. Click the **Issues** tab.
3. Click and select **Show Details** of the selected issue.

   or

   Double-click the issue to open.

   The log history window is displayed.

   Figure 10-1 Create a Notification



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

   An alert pop-up with following options is displayed:

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

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

11. Generate Shift Handover Report

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

This section has the following topics:

- Overview of Shift Handover Reports *(on page 149)*
- Generate and Handover Shift Handover Report *(on page 151)*
- Create Shift Log Template *(on page 156)*
- Manage Shift Handover Authorization *(on page 159)*

11.1. Overview of Shift Handover Reports

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

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

Key Sections in the Shift Handover Report

Summary

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

- **Trends**

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

- **Instructions**

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

- **Shift Information**

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

Logs

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

Rounds

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

Observations

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

Notes

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

Operators

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

11.1.1. Configure What Appears in the Report

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

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

11.2. Generate and Handover Shift Handover Report

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

To generate shift handover report:

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

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

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

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

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

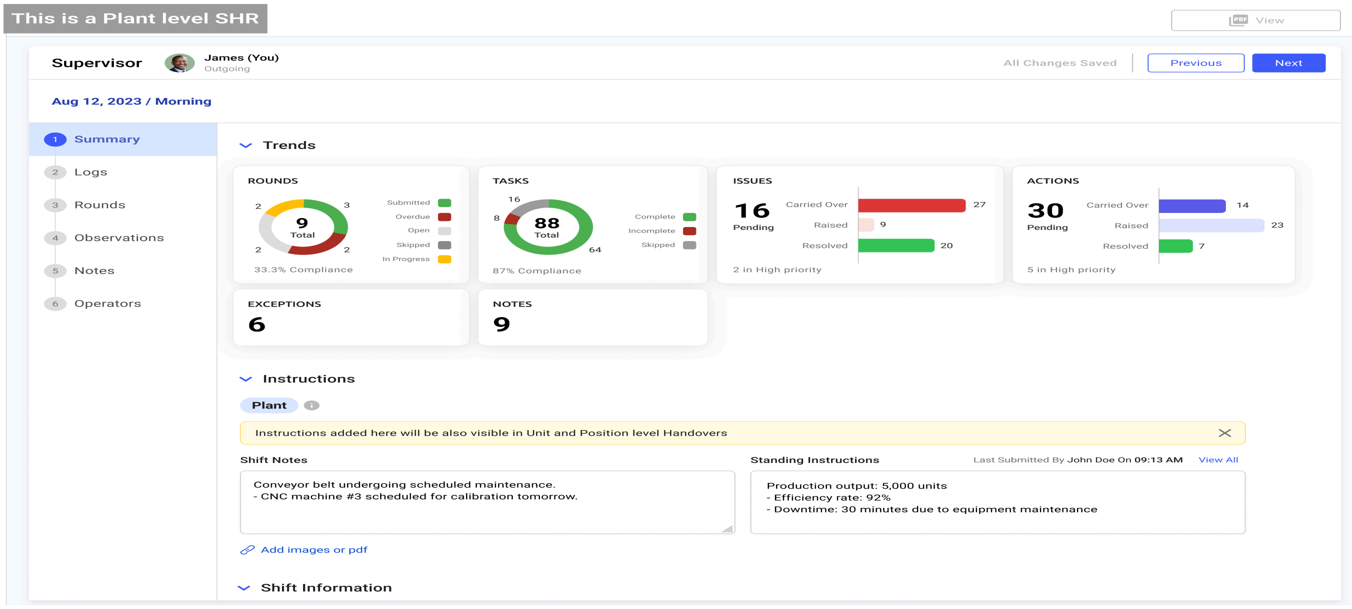
For more information on the above tabs, see Overview of Shift Handover Reports *(on page 149)*.

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

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

    c. Click **Next**.

Figure 11-1 SHR Summary

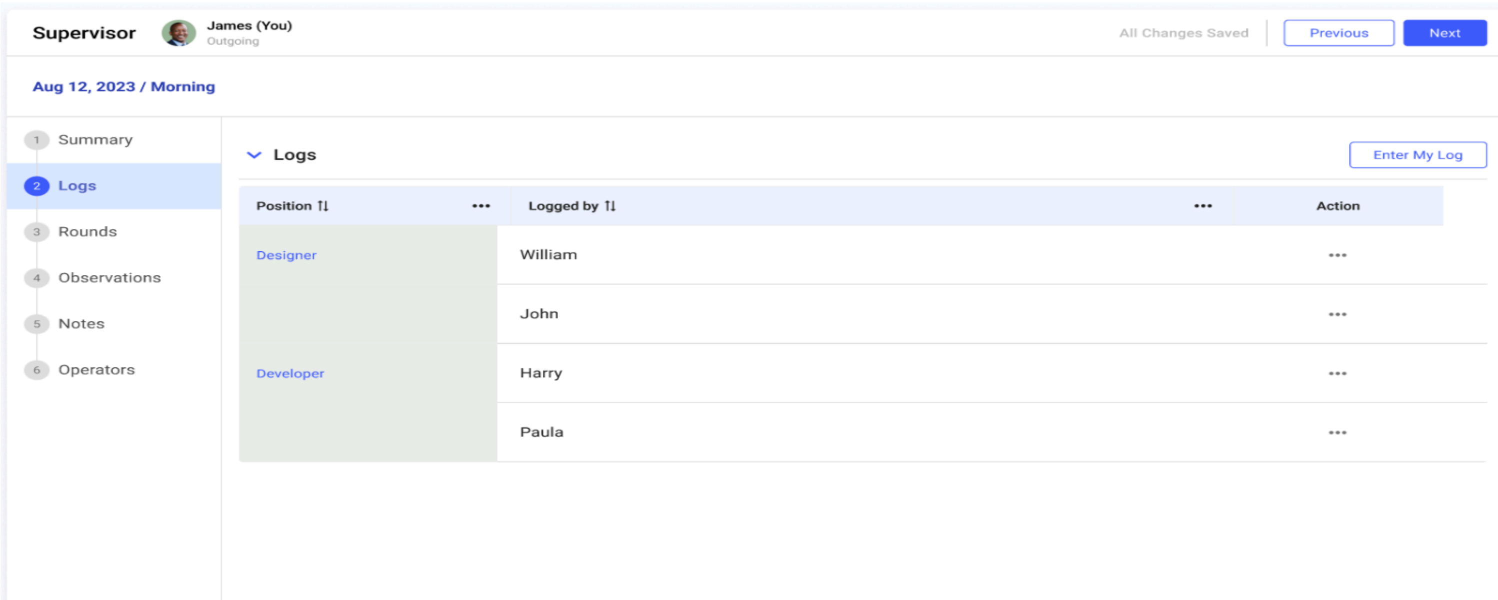


4. In the **Logs** tab,
   a. Click **Enter My Log** on the right-side.

      The shift log template is displayed. For more information, see Create Shift Log Template *(on page 156)*.

   b. Fill the log details in the template.
   c. Click **Add Custom Log** to add custom logs.
   d. Click **Save**.
   e. The log is saved.

Figure 11-2 SHR Logs

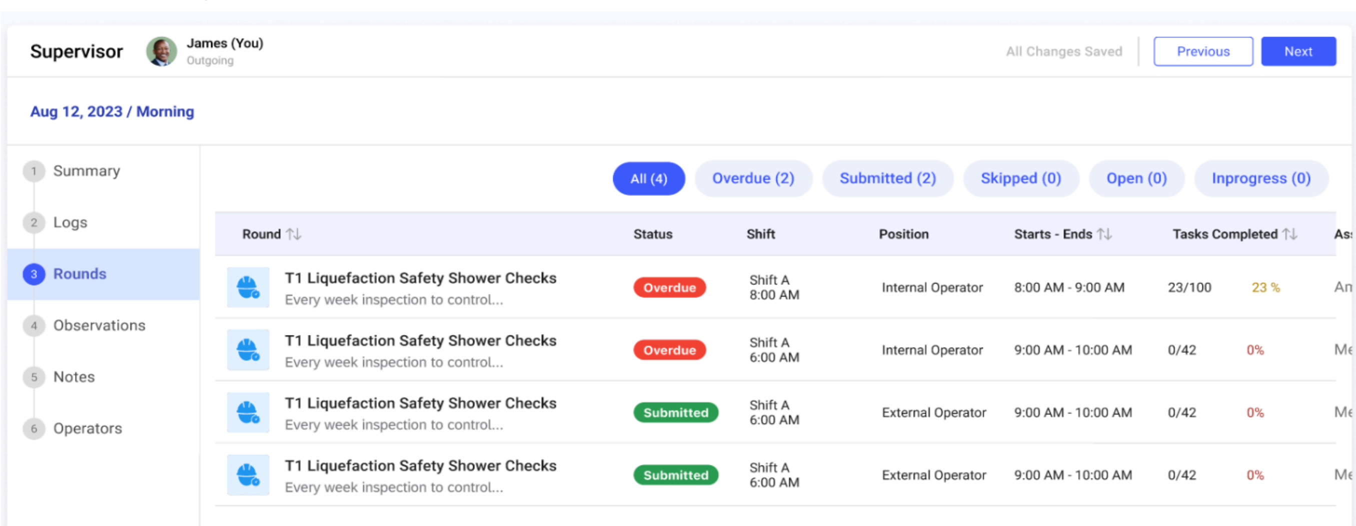


Note:

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

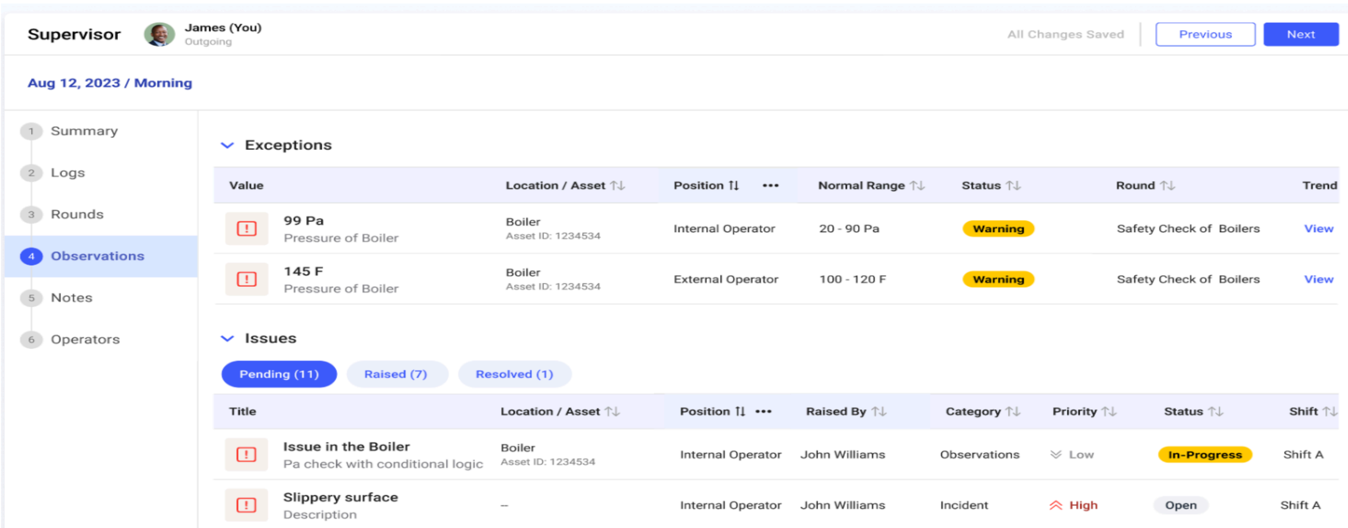
5. In the **Rounds** tab, view the progress of rounds and click **Next** on top right.

Figure 11-3 SHR Rounds



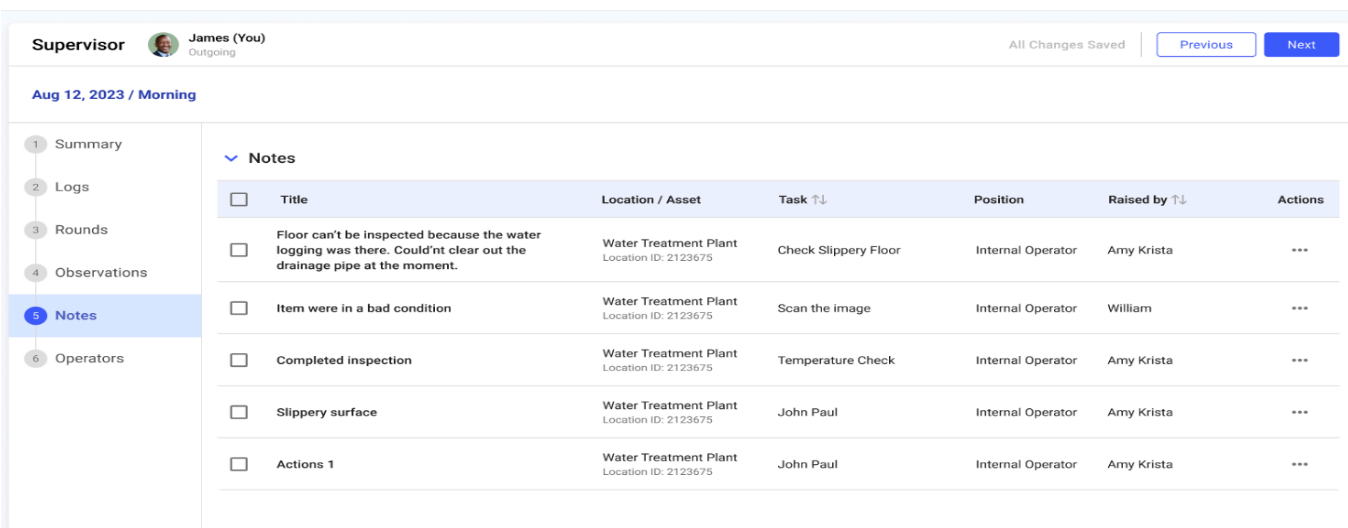
6. In the **Observations** tab, check unresolved issues, exceptions, scan overrides, issues, and actions details and click **Next**.

Figure 11-4 SHR Observations



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

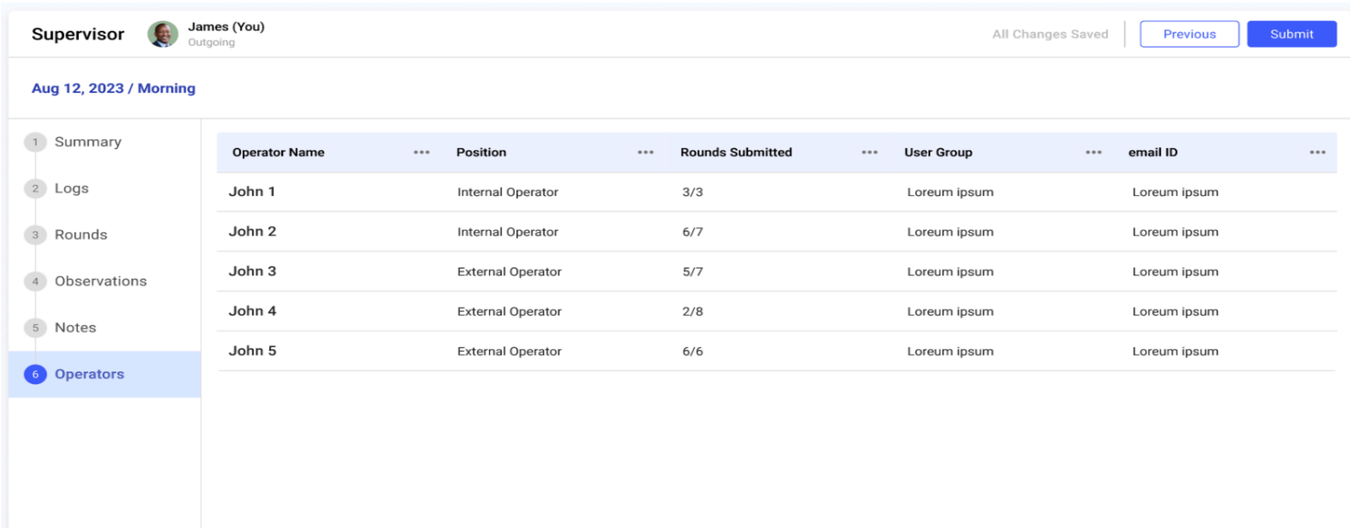
Figure 11-5 SHR Notes



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

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

Figure 11-6 SHR Operators



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

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

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

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

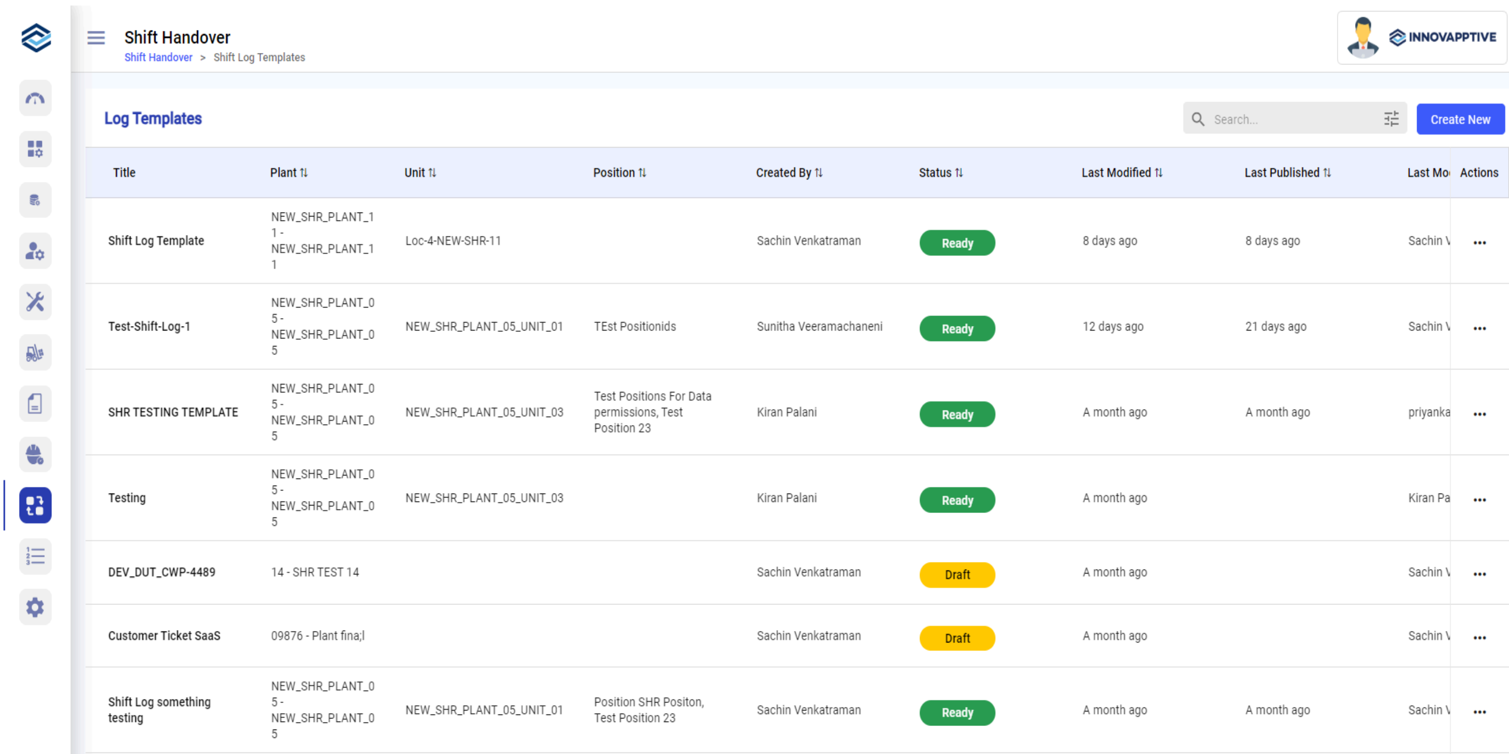
11.3. Create Shift Log Template

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

To create a shift log template:

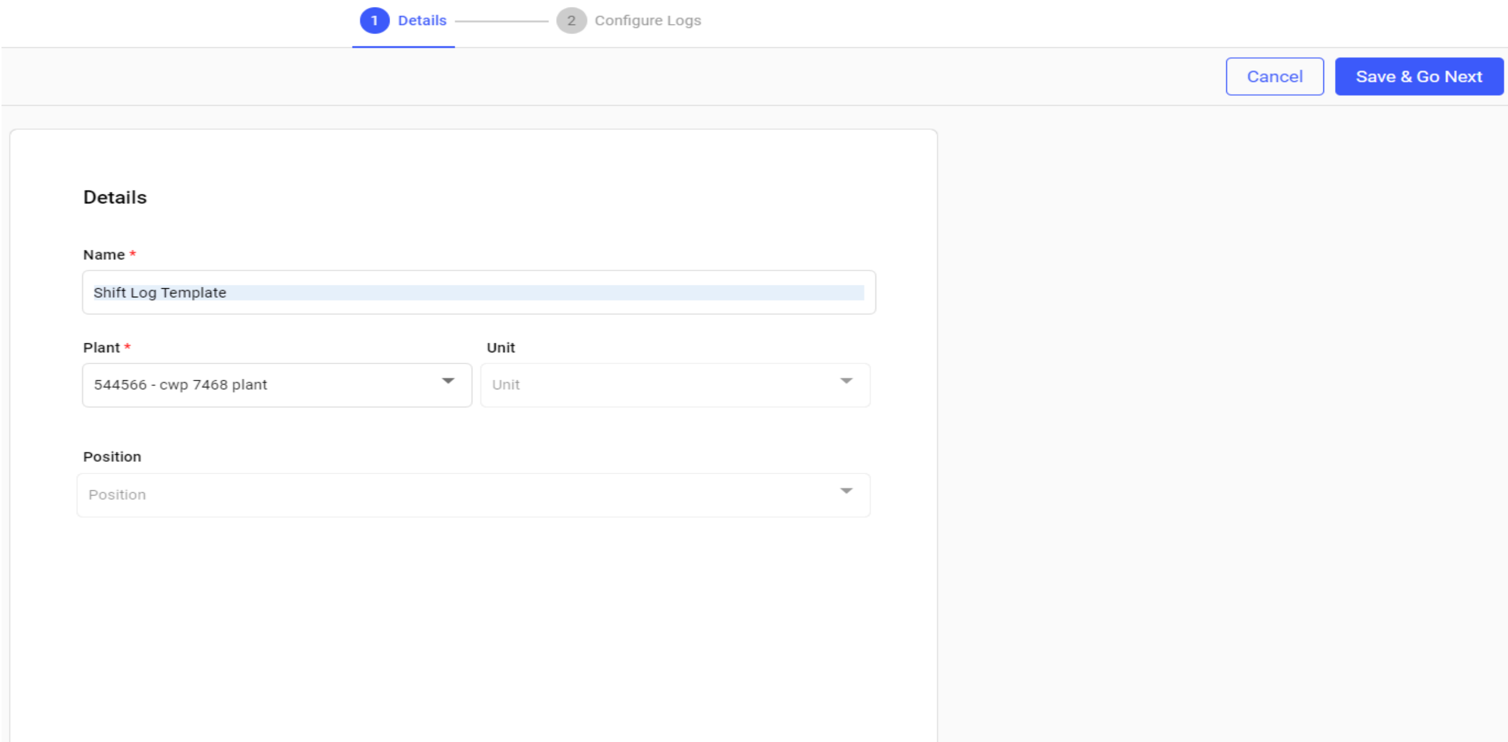
1. Expand **Shift Handover** and click **Shift Log Templates**.
   List of shift log templates are displayed in the Log Templates screen.

Figure 11-7 Log Templates Screen



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

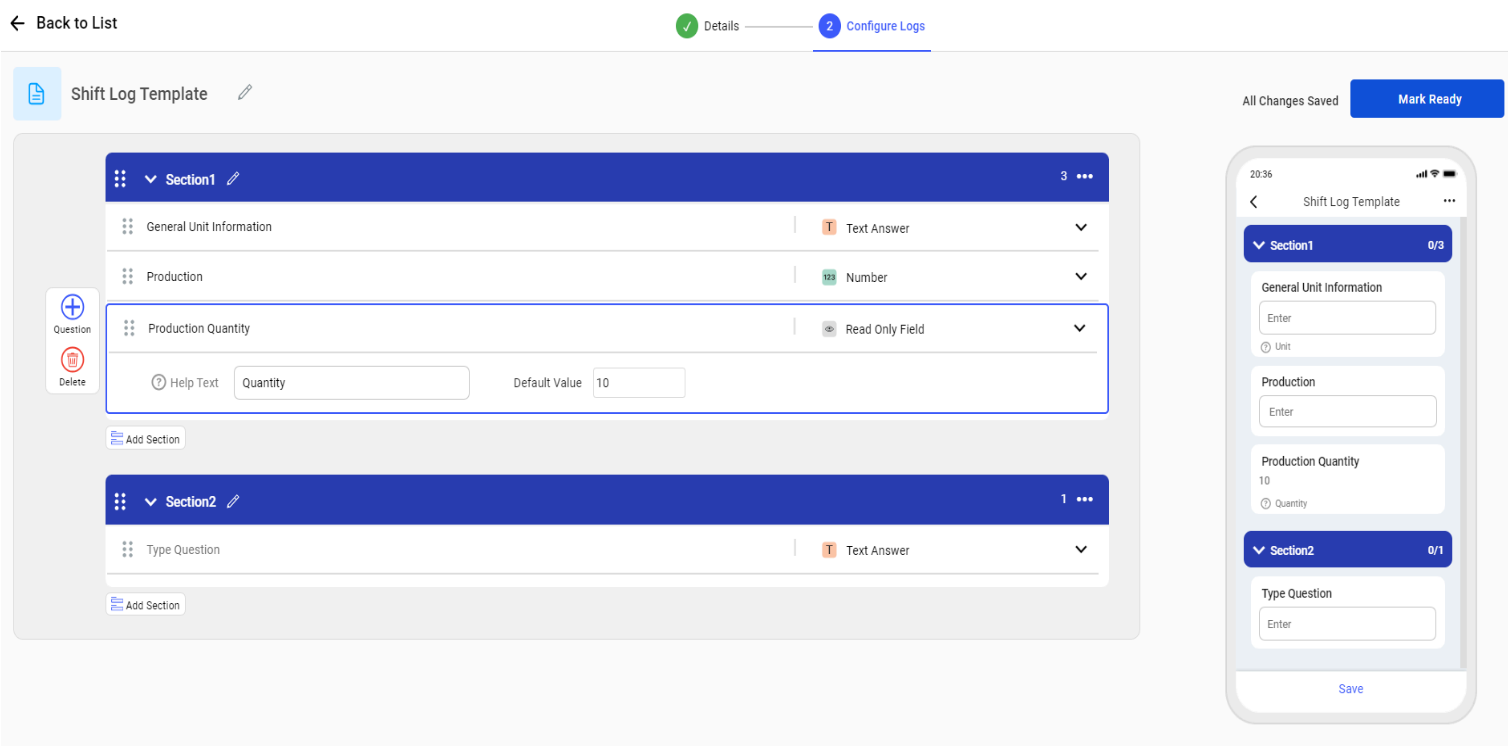
Figure 11-8 Details Screen



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

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

Figure 11-9 Configure Logs Screen



5. Click **Mark Ready**.

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

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

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

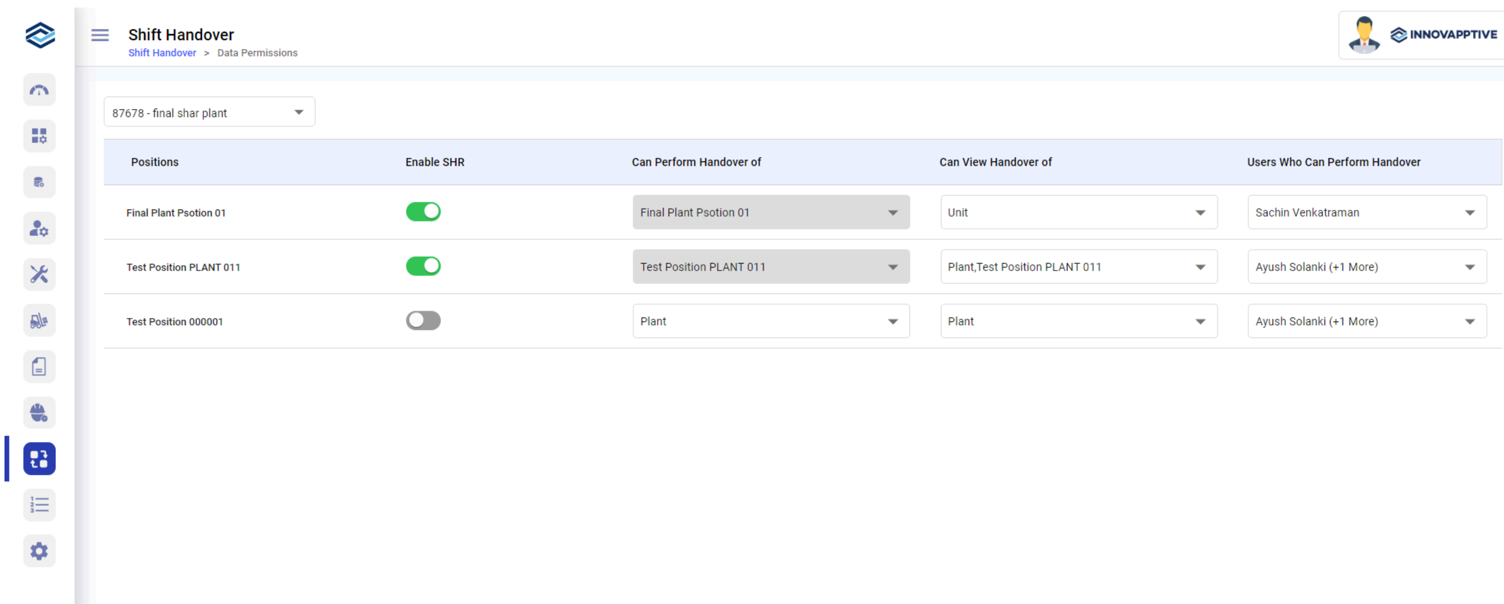
11.4. Manage Shift Handover Authorization

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

To control shift handover template permissions:

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

Figure 11-10 Shift Handover Data Permissions



11.5. Email Configuration for Shift Handover Reports

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

Access Email Configuration

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

Set Up Distribution Levels

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

Configure Recipients

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

Finalizing Configuration

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

How It Works

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

Best Practices

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

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

12. Locate Rounds, Issues, and Actions

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

This section contains the following:

- Search for a Round, Issue, or Action *(on page 162)*
- Apply Filters to Refine Results *(on page 163)*

12.1. Search for a Round, Issue, or Action

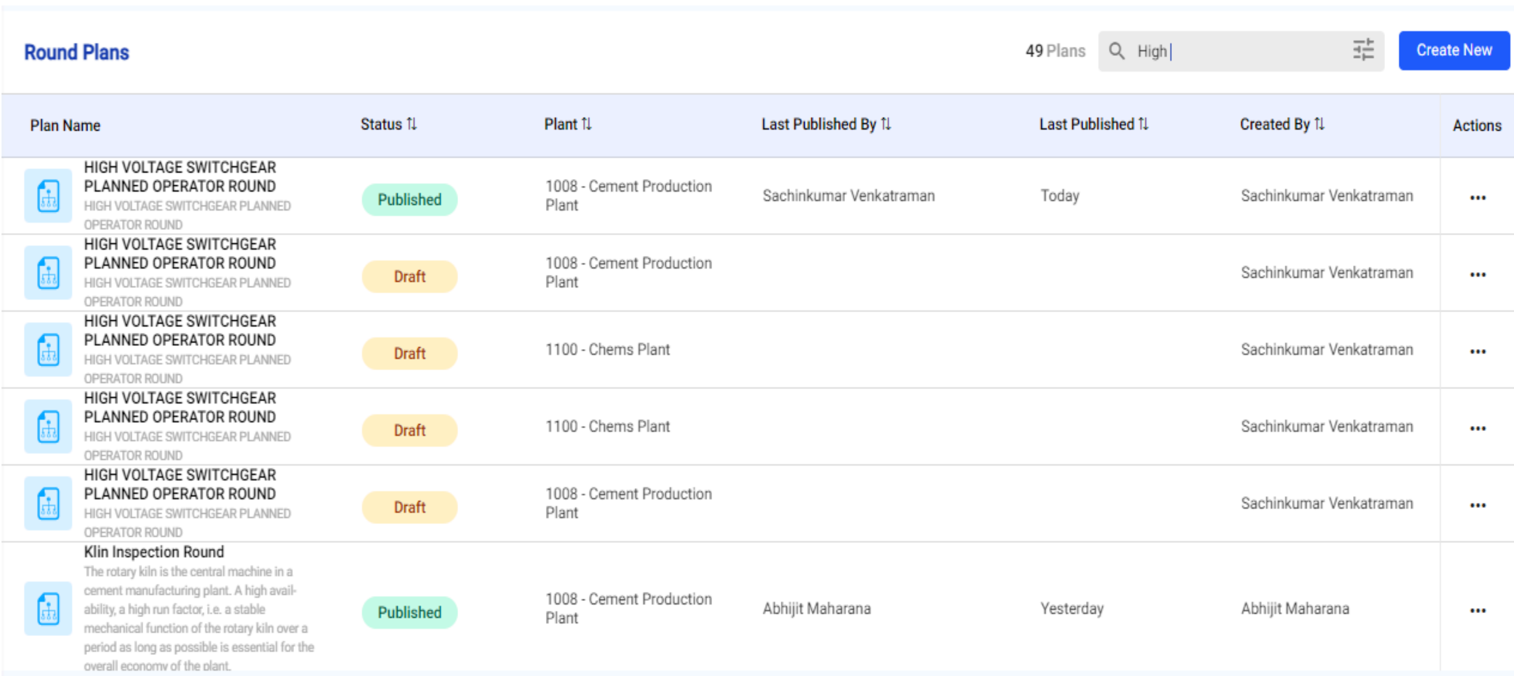
You can search for created, published (scheduled and unscheduled), archived round plans, issues, and actions from their respective screens.

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

To search round plans, issues, and actions:

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

Figure 12-1 Search



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

12.2. Apply Filters to Refine Results

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

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

To filter round plans, issues, and actions:

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

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

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

Figure 12-2 Filter Rounds

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

13. Archive, Restore, and Delete Round Plans

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

This topic contains the following sub topics:

- Archive a Round Plan *(on page 168)*
- Restore a Round Plan *(on page 169)*
- Delete a Round Plan *(on page 169)*

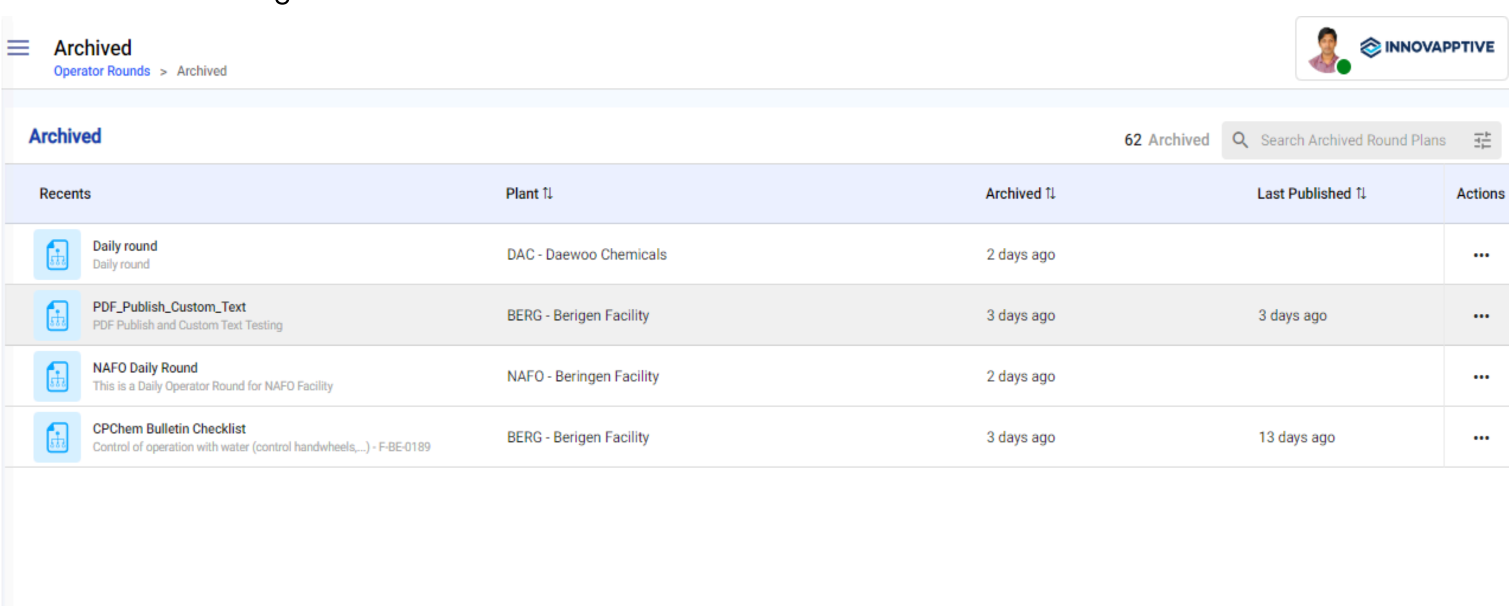
13.1. Archive a Round Plan

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

To archive a round plan:

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

Figure 13-1 Archived Screen



13.2. Restore a Round Plan

Restore archived round plans when you need them again.

To restore an archived round plan:

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

13.3. Delete a Round Plan

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

To permanently delete an archived round plan:

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

14. Create and Manage Round Templates

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

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

Templates have the following status:

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

14.1. Create a Round Plan Template

Create a round template with sections and tasks.

To create a round template:

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

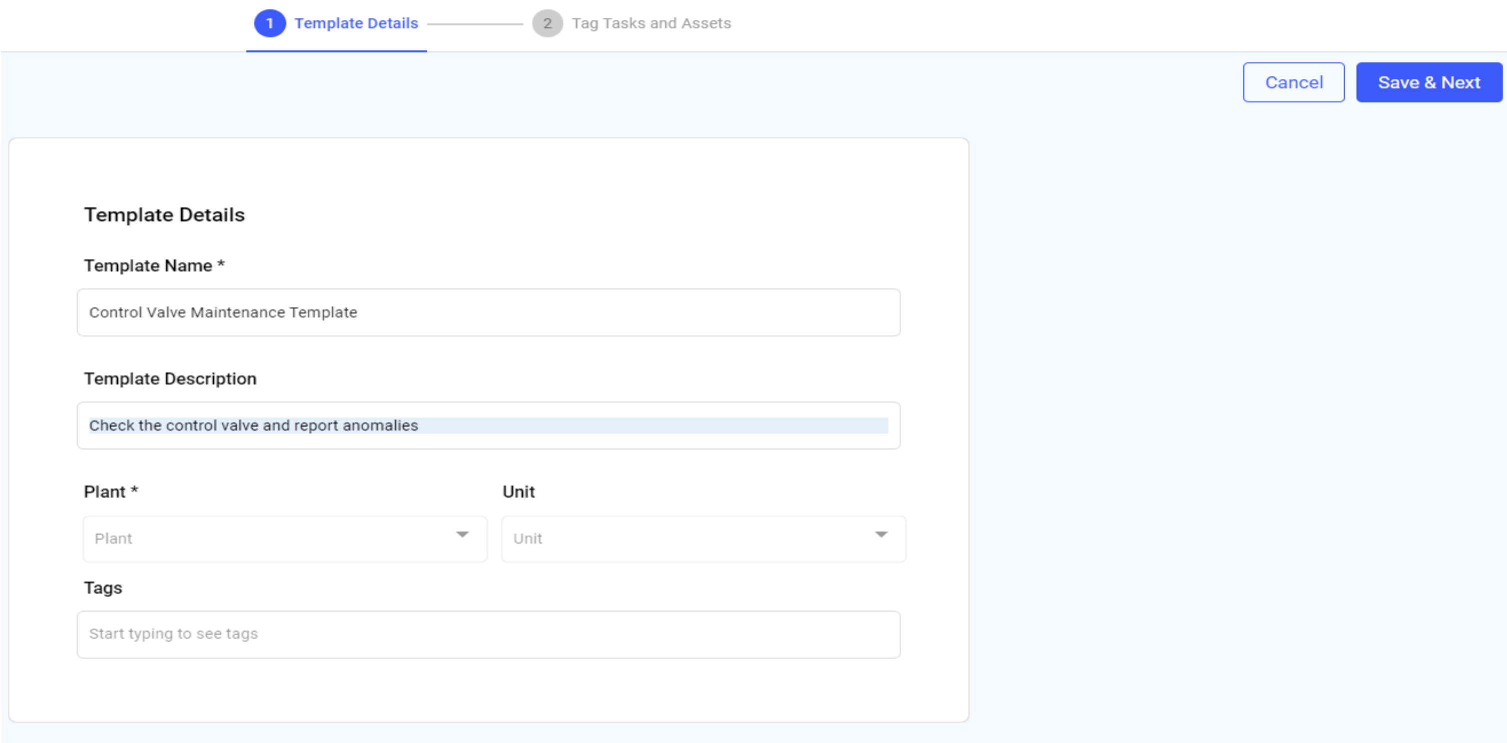
   The Templates screen with the list of round templates is displayed.
2. Click the **Create New** button on the right side.
3. In the **Template Details** screen, fill in the following details.

   Table 14-1 Fill Template Details

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

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

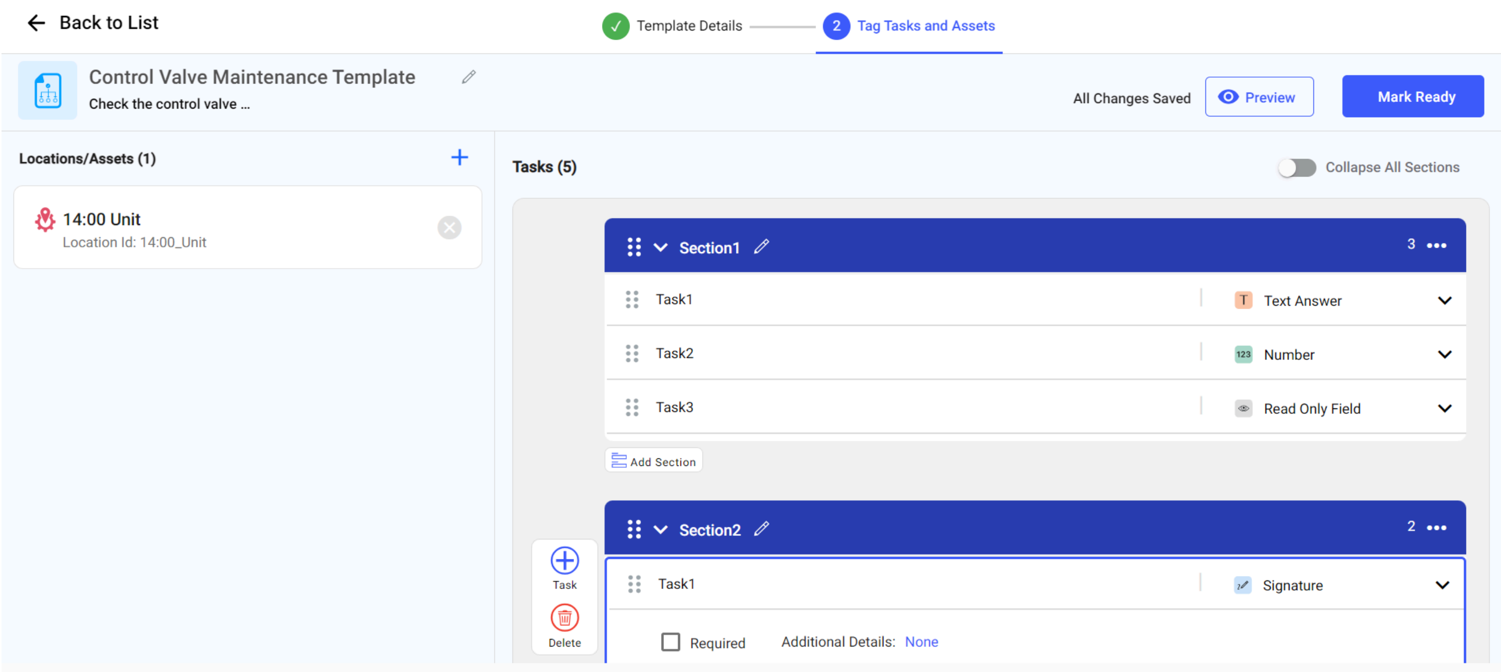
Figure 14-1 Templates Details Screen



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

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

Figure 14-2 Tag Tasks and Assets Screen

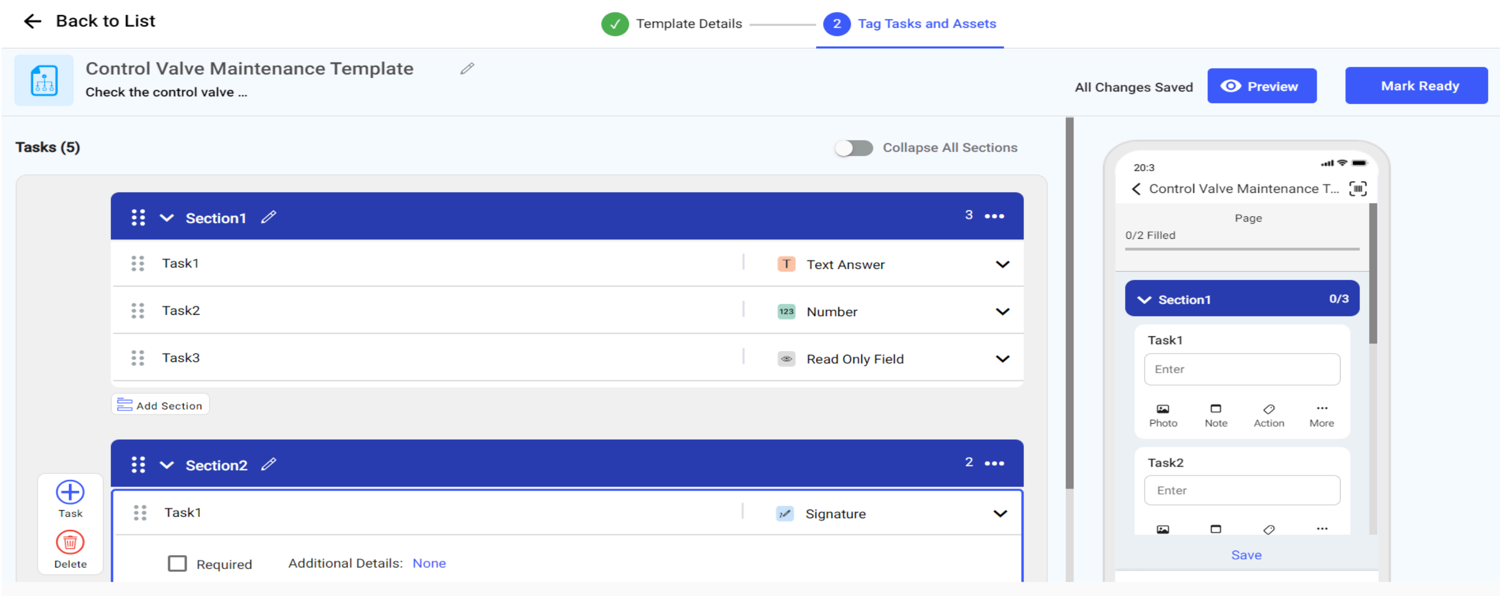


6. In the **Tag Tasks and Assets** screen, select the location or asset on the left side, add pages, multiple sections, and tasks with response types and conditional logic for the location or asset. For more information, see Create a Round Plan and Publish *(on page 99)*.

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

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

Figure 14-3 Template Preview



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

14.2. Create Templates from Existing Templates

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

To copy an existing template and create a new one:

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

14.3. Create Round Plan Template using AI

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

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

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

To create round plan template using AI:

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

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

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

14.4. Edit Round Templates

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

To edit a round template:

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

14.5. Archive Round Templates

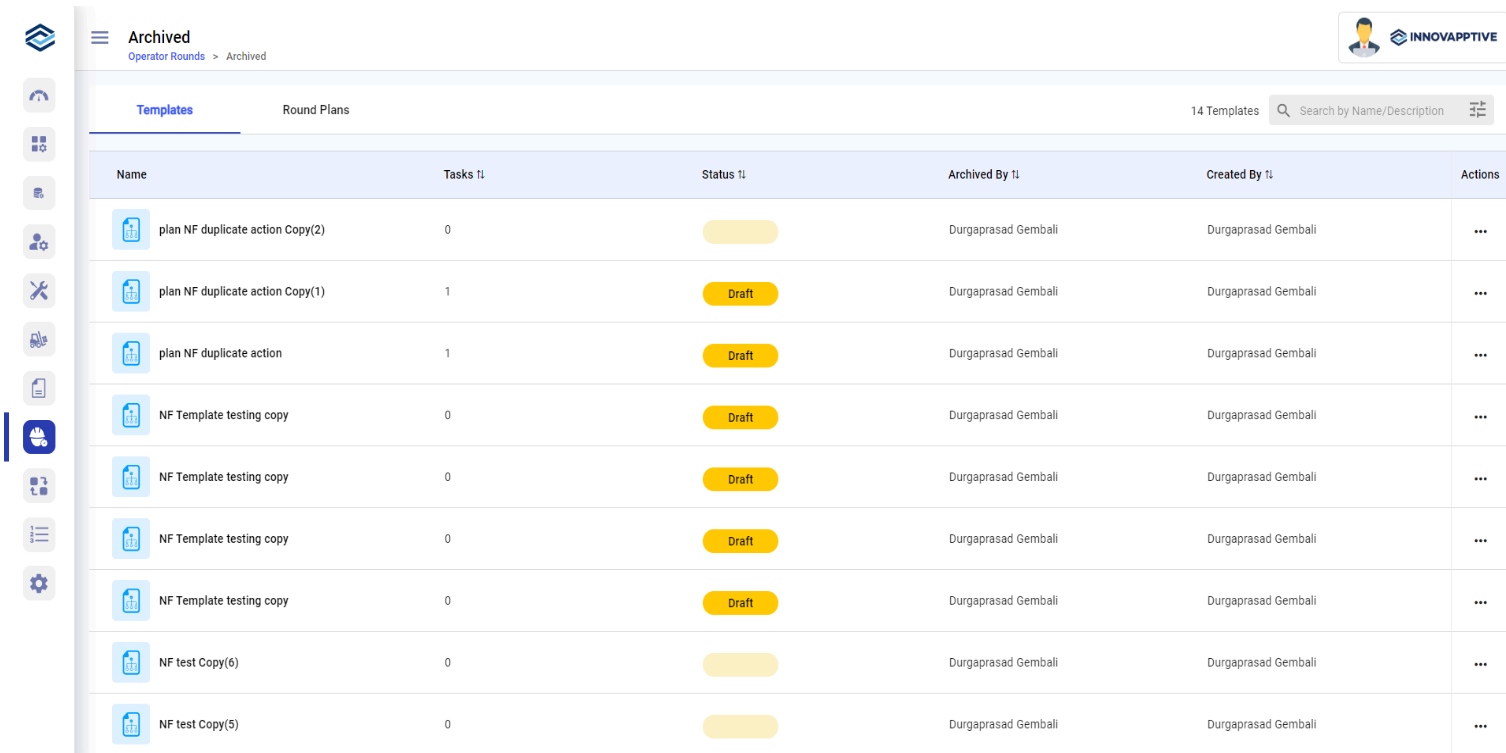
Archive round templates when they are no longer required for asset maintenance. You can also restore archived templates or delete them.

To archive a round template:

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

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

Figure 14-4 Archived Templates



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