

mRounds Configuration Guide

Connected Worker Solutions



Title and Copyright

Copyright and **Terms of Use** page for **Connected Back Office**.

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Preface

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

Intended Audience

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

Document Conventions

Table 0-1 Conventions followed in the document

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

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- [Work Order Management](#)
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1. What's New for mRounds Configurators

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

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

- [New Features and Enhancements in Release 2603 \(on page 7\)](#)
- [New Features and Enhancements in Release 2601 \(on page 8\)](#)
- [New Features and Enhancements in Release 2512 \(on page 8\)](#)
- [Table 1–4: New Features and Enhancements in Release 2504.02 \(on page 9\)](#)
- [New Features and Enhancements in Release 2501 \(on page 9\)](#)
- [New Features and Enhancements in Release 2408 \(on page 10\)](#)
- [New Features and Enhancements in Release 2401 \(on page 11\)](#)
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- [New Features and Enhancements in Release 2309 SP02 \(on page 12\)](#)
- [New Features and Enhancements in Release 2309 \(on page 13\)](#)
- [New Features and Enhancements in Release 2306 \(on page 13\)](#)
- [New Features and Enhancements in Release 2304 \(on page 13\)](#)

New Features and Enhancements in Release 2603

Table 1–1 New Features and Enhancements in Release 2603

Establish a Connection with Maximo for Master Data Integration

Supervisors can now connect mRounds to IBM Maximo and automatically sync Locations and Assets into mRounds master data. Once configured, master data stays current with the Maximo system of record—eliminating manual exports and ensuring operators always work with accurate plant and asset information.

For more information, see [Establish a Connection with Maximo for Master Data Integration \(on page 32\)](#).

Table 1-1 New Features and Enhancements in Release 2603 (continued)

Export Attachment Links to SQL Server via ODBC

Admins can now export attachment links from Rounds, Issues, and Actions to SQL Server through the existing ODBC connector, making attachment references available to reporting tools alongside operational records.

Automated Alerts for ODBC Data Ingestion Failures

Admins now receive automated alerts when ODBC data ingestion fails, enabling faster detection and resolution of sync outages without manual monitoring.

New Features and Enhancements in Release 2601

Table 1-2 New Features and Enhancements in Release 2601

Functional Location ID Masking for Master Data Sync

Admins can now enable masking of Functional Location IDs synced from SAP, allowing location identifiers to be displayed in a simplified format for operators without altering the underlying SAP data.

For more information, see [Create Locations \(on page 53\)](#).

New Features and Enhancements in Release 2512

Table 1-3 New Features and Enhancements in Release 2512

Coordinates and Address for Assets & Locations

Supervisors can now configure GPS-enabled mapping for assets and locations. Once enabled, operators can view inspection sites on maps, navigate to checkpoints, and perform rounds with location accuracy—improving efficiency, safety, and compliance.

For more information, see [Create Locations \(on page 53\)](#).

New Features and Enhancements in Release 2504.02

Table 1–4 New Features and Enhancements in Release 2504.02

Custom Configuration for Consistent and Relevant Shift Transitions

Supervisors can now configure Shift Handover Report formats based on specific plant requirements. With flexible field settings and formats, each site can tailor the shift handover process to local workflows—ensuring consistent and meaningful shift change documentation.

For more information, see [Create Plants \(on page 49\)](#).

New Features and Enhancements in Release 2501

Table 1–5 New Features and Enhancements in Release 2501

Smart Workflow Features

- **Plant-Level Asset Scanning:** Control Asset Scan functionality at the plant level by enabling or disabling it during plant creation or modification.

For more information, see [Create Plants \(on page 49\)](#).

Administrative & Data Management Enhancements

- **Enhanced SFTP Integration:** Added "Units" and "Positions" columns to the SFTP file for task management. For more information, see [Establish a Connection with FTP Server for Data Export \(on page 16\)](#).
- **Plant-Level Asset Scanning:** Granular control over asset scan functionality at the plant level, allowing customization per facility. For more information, see [Create Plants \(on page 49\)](#).
- **Bulk User Creation:** Tenant Admins can now upload CSV or Excel files to create multiple users at once, saving time. For more information, see [Create Tenant/Super Admin role \(on page 41\)](#).

New Features and Enhancements in Release 2408

Table 1-6 New Features and Enhancements in Release 2408

SFTP Server Downtime Notifications

Stay ahead of potential disruptions with SFTP Server Downtime Notifications. This feature sends instant alerts when the SFTP server experiences downtime, enabling the super admin to take immediate action and restore operations without delay.

How it benefits:

- **Proactive Issue Management:** Super admins are promptly informed of any server issues, allowing for quick resolution.
- **Minimized Impact:** Faster responses help reduce the negative effects of server downtime on daily operations.

For more information, see [Establish a Connection with FTP Server for Data Export \(on page 16\)](#).

Plant-Specific Filters in Master Data, Reports and Dashboard

The Plant-Specific Filters feature allows operators to filter and view data, reports, and dashboards specific to individual plants within an organization.

How it benefits:

- **Enhanced Decision-Making:** Plant-specific filters enable managers and operators to make more informed decisions based on precise data from their specific operational unit, avoiding irrelevant information from other plants.
- **Operational Focus:** Operators and staff can focus on their specific plant's performance, driving productivity improvements and targeted troubleshooting without distraction from other operational areas.

For more information, see [Create and Manage Master Data \(on page 49\)](#).

New Features and Enhancements in Release 2401

Table 1-7 New Features and Enhancements in Release 2401

Configure Priorities for Issues and Actions at Tenant Level Set Priority dropdowns with color codes for Issues and Actions at the Tenant Level. For more information, see Create Tenant/Super Admin role (on page 41).
Configure to control notification creation for "Incident" and "Near Miss" categories Configure to control notification creation for "Incident" and "Near Miss" categories at the tenant level, with the option to individually enable or disable SAP Notifications for each category. For more information, see Create Tenant/Super Admin role (on page 41).

New Features and Enhancements in Release 2312

Table 1-8 New Features and Enhancements in Release 2312

Download User List for a Plant Download the user list from the User Management module and view their assigned roles. For more information, see Onboard Users and Assign Roles (on page 66).

New Features and Enhancements in Release 2311

Table 1-9 New Features and Enhancements in Release 2311

Mark Functional Locations as Units Mark or flag Functional Locations as units. This helps assign users to units, create user groups based on units, select a unit while creating a round plan, schedule rounds by unit, and filter handover reports. For more information, see Create Locations (on page 53).

Table 1–9 New Features and Enhancements in Release 2311 (continued)

Add Position Master Data

- Add positions and assign them to users.
- Create user groups and schedule rounds based on positions.

For more information, see [Create Positions \(on page 66\)](#).

New Features and Enhancements in Release 2309 SP03

Table 1–10 New Features and Enhancements in Release 2309 SP03

Create Master Data with Unique ID and avoid duplication

- Create master data such as plants, assets, and locations with a unique id and avoid duplication.
- Manually enter ids when copying to prevent duplicates in assets, locations, and plants.
- Receive error messages for duplicate IDs and records while bulk uploading master data.

For more information, see [Create and Manage Master Data \(on page 49\)](#).

New Features and Enhancements in Release 2309 SP02

Table 1–11 New Features and Enhancements in Release 2309 SP02

Sort Global Response Set by Ascending to Descending Order

Create a Global Response Set by sorting the Global Pick List in both ascending order ("A to Z") and descending order ("Z to A").

For more information, see [Create Global Response Set \(on page 62\)](#).

New Features and Enhancements in Release 2309

Table 1-12 New Features and Enhancements in Release 2309

Introduced User Groups

- Create a user group and add users to the group.
- Modify the user list in the user group.
- Remove a user from the user group.
- Copy an existing user group to quickly create new user groups.
- Delete a user group and assign rounds to another group.

For more information, see [Create User Groups and Add Users \(on page 74\)](#).

Assign users to multiple plants

Assign users to multiple plants. Users can access plant specific data and execute maintenance for assets in the plant.

For more information, see [Create Users and Assign Roles \(on page 70\)](#).

New Features and Enhancements in Release 2306

Table 1-13 New Features and Enhancements in Release 2306

Setup Timezone at Plant Level

- Assign country codes to plant masters.
- Enable time zone selection based on the plant's country.

For more information, see [Create Plants \(on page 49\)](#).

New Features and Enhancements in Release 2304

Table 1-14 New Features and Enhancements in Release 2304

Add, Search, View, and Edit Plants Data

Table 1-14 New Features and Enhancements in Release 2304 (continued)

• Add, edit / modify plants' data. • Search plants and view details. For more information, see Create Plants (on page 49).
Add, Search, View, and Edit Asset Data • Add, edit / modify assets data. • Search assets and view details. • Bulk upload assets data through excel files. For more information, see Create Plants (on page 49).
Add, Search, View, and Edit Location Data • Add, edit / modify locations' data for assets. • Search locations and view details. • Bulk upload locations data through excel files. For more information, see Create Locations (on page 53).
Add, Search, View, and Edit Unit of Measurement (UOM) Data • Add, edit / modify units of measurement. • Search the list of UOMs and view details. • Bulk upload UOM through excel files. For more information, see Create Unit of Measurement (on page 59).
Add, Search, View, and Edit Global Response Set Data • Add, edit / modify Global Response Set data. • Search Global Response Set data and view details. • Bulk upload Global Response Set data through excel files. For more information, see Create Global Response Set (on page 62).

Table 1-14 New Features and Enhancements in Release 2304 (continued)

Onboard New Customers

- Onboard customers as a tenant/super admin.
- View and edit the tenant details such as primary, ERP, protected resources, database configuration, collaboration, configuration, and assets.
- Provide access to modules in the CBO application.
- Add a customer logo in the application for tenant users to identify the instance of the connected worker platform.

For information, [Onboard Tenants/Super Admins \(on page 41\)](#).

Onboard Users

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

For information, [Create Users and Assign Roles \(on page 70\)](#).

2. Integrate mRounds with External Systems

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

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

This chapter has the following topics:

- [Establish a Connection with FTP Server for Data Export \(on page 16\)](#)
- [Establish a Connection with ODBC for Database Integration \(on page 20\)](#)
- [Configure an SMTP Server for Automated Email Notifications \(on page 24\)](#)
- [Establish a Connection with SAP for Data Integration and Rounds Maintenance \(on page 28\)](#)
- [Establish a Connection with Enablon for EHS Incident Management \(on page 37\)](#)

2.1. Establish a Connection with FTP Server for Data Export

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

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

To create a connection for FTP server:

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

Figure 2-1 Create FTP Connection

The screenshot shows a modal window titled "Add Connection" with a close button (X) in the top right corner. The window contains several input fields and a toggle switch:

- Select Connector:** A dropdown menu with "FTP Server" selected.
- Connection Alias:** A text input field.
- Hostname:** A text input field.
- Port:** A text input field.
- Secure (SFTP):** A toggle switch that is currently turned off. To its right, text reads "Recommended port for FTP is 21".
- Username:** A text input field.
- Password:** A text input field with a toggle icon on the right.
- Path:** A text input field.

At the bottom of the window, there are three buttons: "Test Connection" (disabled), "Cancel" (blue text), and "Save Connection" (disabled).

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

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

In this section, you can,

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

Configure Data Export to FTP for Automated Transfer

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

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

To add an integration to FTP server

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

Figure 2-2 Add Integration Point

The screenshot shows a modal window titled "Add Integration Point" with a close button (X) in the top right corner. The window contains the following elements:

- A dropdown menu labeled "Select Integration Point" with "Rounds" selected.
- Two radio buttons for "Data Sync Time": "End of the Day" (selected) and "End of the Week".
- A date input field for "Start Date" showing "Feb 20, 2025".
- A dropdown menu labeled "Select Round Statuses" with "Overdue, Submitted, Skipped, Approved, Rejected" selected.
- A toggle switch for "Filter Tasks with Tags" which is currently "Disabled".
- A toggle switch for "Send Attachments" which is currently "Disabled".
- A blue button labeled "Column Configuration" with a downward arrow.
- A light blue section labeled "Main Columns" with a "Reset to Default View" link.
- "Cancel" and "Save" buttons at the bottom right.

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

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

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

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

2.2. Establish a Connection with ODBC for Database Integration

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

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

To create a connection for ODBC connector:

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

Figure 2-3 Add ODBC Connection

The screenshot shows a modal window titled "Add Connection" with a close button (X) in the top right corner. The window contains the following fields and controls:

- Select Connector:** A dropdown menu with "ODBC Connector" selected.
- Connection Alias:** A text input field.
- DB Hostname:** A text input field.
- Username:** A text input field.
- Password:** A text input field with a toggle icon on the right.
- Database Name:** A text input field.
- Database Port:** A text input field.
- Database Dialect:** A dropdown menu with "Select" selected.
- Buttons:** "Test Connection", "Cancel", and "Save Connection" (disabled) are located at the bottom.

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

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

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

In this section, you can,

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

Configure Data Export to ODBC for Database Storage

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

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

To add an integration to ODBC connection:

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

Figure 2-4 Add Integration Point

Add Integration Point

Select Integration Point

Round Submission

Data Synchronization

☒ Real-time

☐ Scheduled

Data Mapping

CBO(Source) Data Attribute	Destination Data Attribute
Round Plan ID ROUND_PLAN_ID	ROUND_PLAN_ID
Round Plan Name ROUND_PLAN_NAME	ROUND_PLAN_NAME
Round Plan Description ROUND_PLAN_DESC	ROUND_PLAN_DESC
Plant ID PLANT_ID	PLANT_ID
Plant Name PLANT_NAME	PLANT_NAME
Shift Name SHIFT_NAME	SHIFT_NAME

Cancel

Save

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

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

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

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

2.3. Configure an SMTP Server for Automated Email Notifications

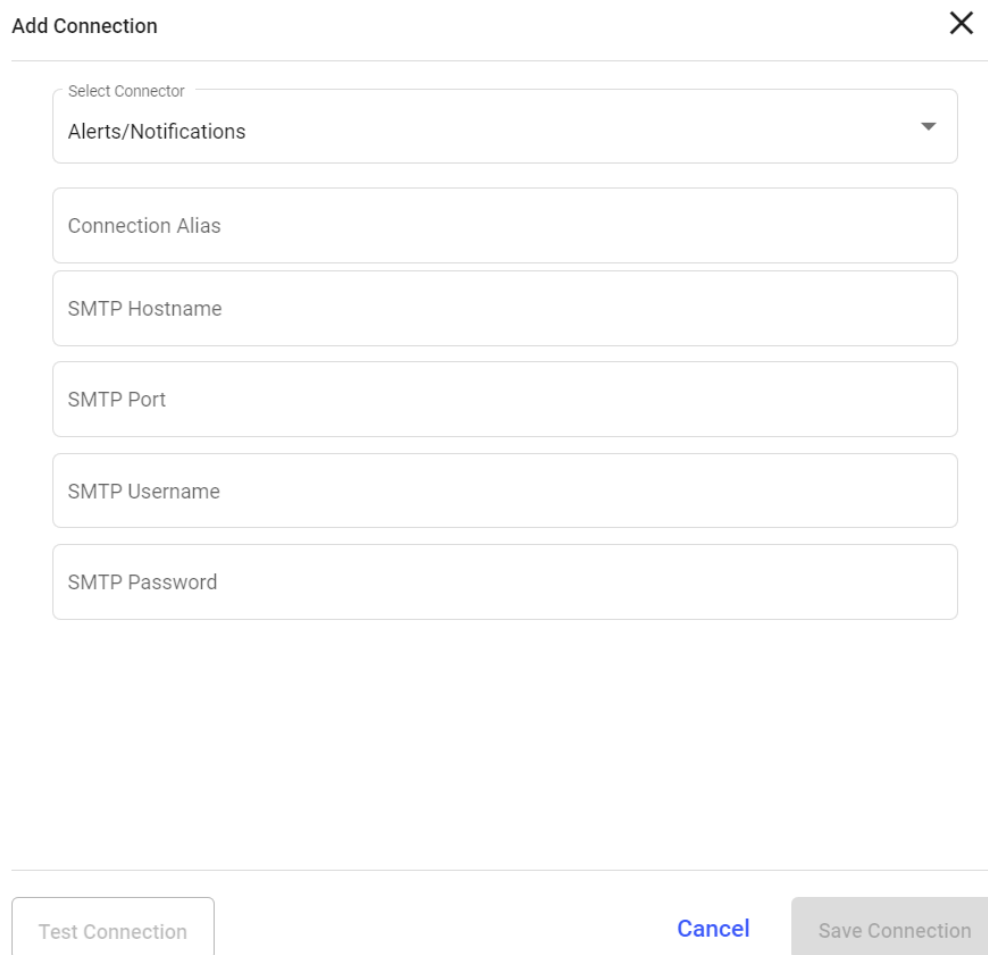
Configuring an SMTP (Simple Mail Transfer Protocol) server allows mRounds to send automated email notifications to stakeholders about task completions, issues, and important updates. This connection ensures timely communication about maintenance operations.

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

To create a connection for SMTP server:

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

Figure 2-5 Add SMTP Connection



The screenshot shows a modal window titled "Add Connection" with a close button (X) in the top right corner. The form contains the following fields:

- Select Connector**: A dropdown menu with "Alerts/Notifications" selected.
- Connection Alias**: A text input field.
- SMTP Hostname**: A text input field.
- SMTP Port**: A text input field.
- SMTP Username**: A text input field.
- SMTP Password**: A text input field.

At the bottom of the form, there are three buttons: "Test Connection" (light gray), "Cancel" (blue text), and "Save Connection" (gray).

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

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

In this section, you can,

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

Configure Email Notifications with SMTP

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

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

To add an integration to SMTP server:

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

Figure 2-6 Add Integration Point

Add Integration Point

Select Integration Point

Round Submission

Data Synchronization

☒ Real-time

☐ Scheduled

Data Mapping

CBO(Source) Data Attribute	Destination Data Attribute
Round Plan ID ROUND_PLAN_ID	ROUND_PLAN_ID
Round Plan Name ROUND_PLAN_NAME	ROUND_PLAN_NAME
Round Plan Description ROUND_PLAN_DESC	ROUND_PLAN_DESC
Plant ID PLANT_ID	PLANT_ID
Plant Name PLANT_NAME	PLANT_NAME
Shift Name SHIFT_NAME	SHIFT_NAME

Cancel

Save

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

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

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

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

2.4. Establish a Connection with SAP for Data Integration and Rounds Maintenance

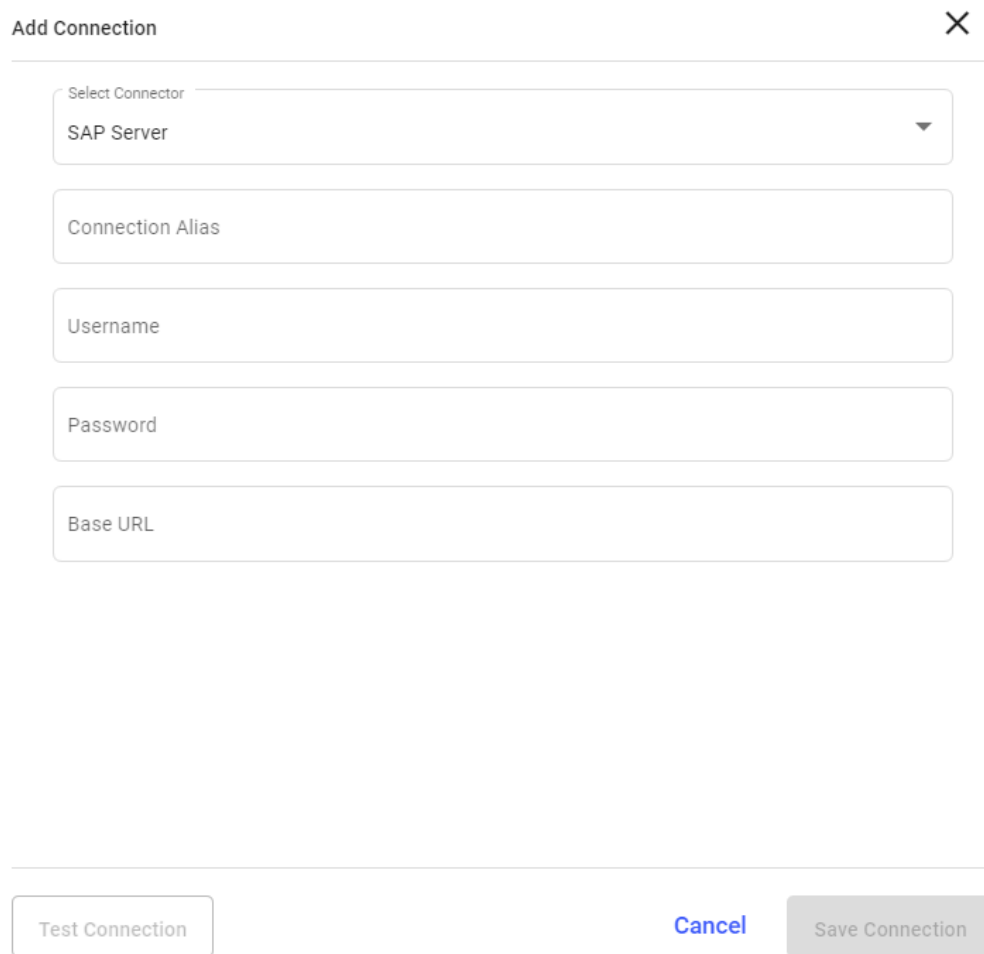
The SAP integration allows mRounds to send critical rounds data directly into an SAP system. This connection is essential for synchronizing maintenance data with the organization's SAP ERP system, enabling automated work order creation and maintenance tracking.

- **Automate Work Orders:** Send rounds results directly to SAP to automatically generate work orders for equipment that needs servicing.
- **Ensure Data Synchronization:** Keep SAP up to date with real-time maintenance data from mRounds, ensuring comprehensive asset tracking and reporting.

To create a connection for SAP server:

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

Figure 2-7 Add SAP Connection



The image shows a modal dialog box titled "Add Connection" with a close button (X) in the top right corner. The dialog contains five input fields stacked vertically: "Select Connector" (a dropdown menu with "SAP Server" selected), "Connection Alias", "Username", "Password", and "Base URL". At the bottom of the dialog, there are three buttons: "Test Connection", "Cancel", and "Save Connection".

Add Connection ✕

Select Connector
SAP Server ▼

Connection Alias

Username

Password

Base URL

Test Connection Cancel Save Connection

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

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



Note:

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

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



Note:

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

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

In this section, you can,

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

Configure Data Synchronization with SAP for Automated Maintenance

Once connected to SAP, you can configure mRounds to automatically send rounds data, asset status, and issue logs to the SAP system. This integration helps generate work orders, track asset health, and streamline the entire maintenance process.

- **Seamless Work Order Generation:** Automatically create work orders in SAP based on the results of completed rounds.
- **Improved Maintenance Tracking:** Keep SAP updated with real-time asset data, allowing for better monitoring and decision-making.

To add an integration to SAP:

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

Figure 2-8 Add Integration Point

Add Integration Point

Select Integration Point

Integration Type ☒ Inbound ☐ Outbound

Data Sync Time ☐ Real-time ☒ Scheduled

Repeat Every 1 day

Start Date 3/12/2024

Plants

Location Assets

Cancel Save

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

- f. Select plant from the **Plants** drop-down where the location or asset residing.
- g. In the **Location or Assets** tab, enter the collection in the **URL** field.
- h. In the **Column Configuration** section, map the CBO data columns to SAP data columns.
- i. Click **Save**.

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

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

2.5. Establish a Connection with Maximo for Master Data Integration

The Maximo integration allows mRounds to synchronize Locations and Assets directly from IBM Maximo, eliminating manual export-and-upload cycles and ensuring that plant structure and asset information remain accurate as the Maximo system of record evolves.

- **Automated Master Data Sync:** Keeps mRounds Locations and Assets aligned with Maximo without manual intervention
- **Full Load and Incremental Updates:** Performs a complete data load on first sync; subsequent runs retrieve only changed records, making ongoing syncs fast and resource-efficient.
- **Location Hierarchy Preservation:** Imports parent-child location relationships so round plans and assignments reflect the actual physical plant structure.
- **Graceful Asset Retirement:** Deactivates assets in mRounds when Maximo marks them inactive, preserving historical round data while excluding retired assets from new scheduling.

To create a connection for Maximo:

1. Click the **Integrations Manager** module on the left side pane.
2. Click the Add button in the **Connections** section on the left side.
3. In the **Add Connection** window, do the following:
 - a. Select Maximo Server from the Select Connector drop-down.
 - b. Enter a descriptive name in the Connection Alias field.
 - c. Select the Authorization type from the drop-down: API Key, Basic (MAXAUTH), or OAuth Token. Fill in the fields that appear based on the selected authorization type.
 - d. Enter the Maximo base URL.
 - e. Enter the API key used to authenticate the Maximo connection.
 - f. Click Test Connection to verify the connection.
 - g. Click Save Connection if the connection is successful.

Figure 2-9 Add Maximo Connection

The screenshot shows the 'Add Connection' dialog box with a close button (X) in the top right corner. The dialog contains the following fields:

- Select Connector:** A dropdown menu with 'IBM Maximo Connector' selected.
- Connection Alias:** A text field containing 'IBM Maximo'.
- Authorization:** A dropdown menu with 'API Key' selected.
- Key:** A text field containing 'eklXX'.
- Base URL:** A text field containing 'https://maximo.manage.maximo.apps.innovapptive-maximo.max.innovapptive.com'. This field is highlighted with a red dashed border.

At the bottom of the dialog, there are three buttons: 'Test Connection' (disabled), 'Cancel', and 'Save Connection' (active).

The connection is created successfully and displayed in the Connections section. In this section, you can:

- Click the More icon next to the connection:
 - Select View Details to see the connection details.
 - Select Edit Connection to update the connection details.
 - Select Delete Connection to remove the connection.

Configure Master Data Synchronization with Maximo

Once the Maximo connection is established, configure an integration point to define the sync schedule, plant mapping, and field mappings for Locations and Assets.

To add a Master Data integration point for Maximo:

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

Figure 2-10 Add Integration Point

Add Integration Point

Select Integration Point

Integration Type ☒ Inbound ☐ Outbound

Data Sync Time ☐ Real-time ☒ Scheduled

Repeat Every 1 day

Start Date 3/12/2024

Plants

Location Assets

Cancel Save

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

- f. Select plant from the **Plants** drop-down where the location or asset residing.
- g. In the **Location or Assets** tab, enter the collection in the **URL** field.
- h. In the **Column Configuration** section, map the CBO data columns to SAP data columns.
- i. Click **Save**.

Figure 2-11 Location Column Configuration

SAP Data Column	CBO Data Column
Location LOCATION_ID	location
Location Name LOCATION_NAME	description
Plant PLANT_ID	siteid
Parent Location PARENT_LOC_ID	lochierarchy.0.parent
Description DESCRIPTION	description_longdescription
Type: TYPE	type
Status STATUS	status
Last Modified	changoedate

Cancel **Save**

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

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

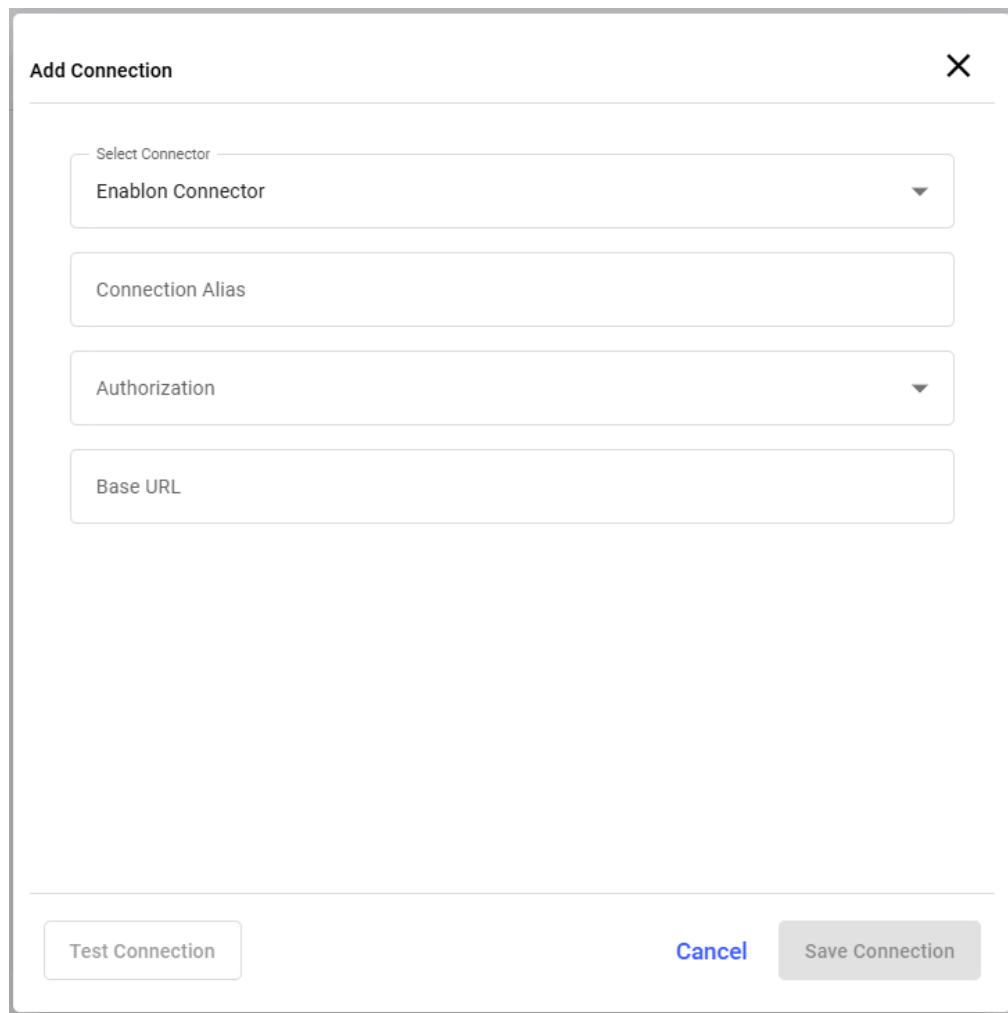
2.6. Establish a Connection with Enablon for EHS Incident Management

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

To create a connection for Enablon connector:

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

Figure 2-12 Add Enablon Connection



The screenshot shows a modal window titled "Add Connection" with a close button (X) in the top right corner. Inside the window, there are four input fields stacked vertically: "Select Connector" (a dropdown menu with "Enablon Connector" selected), "Connection Alias" (a text input field), "Authorization" (a dropdown menu), and "Base URL" (a text input field). At the bottom of the window, there are three buttons: "Test Connection" (disabled), "Cancel" (blue text), and "Save Connection" (disabled).

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

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



Note:

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

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



Note:

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

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

In this section, you can,

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

Configure EHS Notifications with Enablon

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

To add an integration to Enablon:

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

Figure 2-13 Add Integration Point

Add Integration Point [X]

Select Integration Point
Master Data ▼

Integration Type ☒ Inbound ☐ Outbound

Data Sync Time ☐ Real-time ☒ Scheduled

Repeat Every 1 day ▼

Start Date 2/20/2025 [Calendar Icon]

Plants ▼

☒ Maintenance Plant ☐ Planning Plant

Location Assets

URL

Cancel Save

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

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

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

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

3. Onboard Tenants/Super Admins

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

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



Note:

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

In this module, you can,

- Select the relevant product such as mInventory and mWorkOrder using the **Product** drop-down.
- Search the admin roles using the **Search** bar.
- Create super admin roles using the **Add Tenant** button.
- Edit super admin roles using the More  icon > **Edit** option.

You can edit the admin details. Select the admin in the Tenant Management screen and then click the **Edit** button on the right side or clicking the More  icon > **Edit** option in the Tenant Management screen.



Note:

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

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

3.1. Create Tenant/Super Admin role

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

To create a tenant/super admin role:

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

Figure 3-1 Tenant Management Module

Tenant ID	Products	Modules	Admin	Created On	Actions
Innovapptive demo	MWORKORDER, MINVENTORY	Dashboard, Tenant Management, Maintenance Control Center, Spare Parts Control Center, User Management, Work Instructions Authoring	Navaneetha Kondra Navaneetha.Kondra@innovapptive.com	6/14/22, 2:41 PM	...
Innovapptive Qa	MWORKORDER, MINVENTORY	Dashboard, Tenant Management, Maintenance Control Center, Spare Parts Control Center, User Management, Work Instructions Authoring	Navaneetha Kondra Navaneetha.Kondra@innovapptive.com	6/14/22, 2:28 PM	...
Innovapptive Dev	MWORKORDER, MINVENTORY	Dashboard, Tenant Management, Maintenance Control Center, Spare Parts Control Center, User Management, Work Instructions Authoring	Navaneetha Kondra Navaneetha.Kondra@innovapptive.com	6/14/22, 2:10 PM	...
Innovapptive	MWORKORDER, MINVENTORY	Dashboard, Tenant Management, Maintenance Control Center, Spare Parts Control Center, User Management, Work Instructions Authoring	tenant admin tenant.admin@innovapptive.com	5/17/22, 5:30 PM	...
Developer Program	MWORKORDER, MINVENTORY	Dashboard, Tenant Management, Maintenance Control Center, Spare Parts Control Center, User Management, Work Instructions Authoring	tenant admin shivs.karnaboina@ym273.amnionsoft.com	5/17/22, 5:30 PM	...

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



Note:

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

Figure 3-2 Add Tenant Primary Details

The screenshot shows the 'Innovapptive Dev' tenant configuration page. The page has a sidebar with navigation icons and a main content area with tabs for '1. PRIMARY', '2. ERPs', '3. PROTECTED RESOURCES', '4. DB CONFIGURATIONS', '5. COLLABORATION', '6. CONFIGURATIONS', and '7. ASSETS'. The '1. PRIMARY' tab is active, displaying a form with fields for Tenant ID, Tenant Name, Tenant IDP (dropdown), Client ID, Authority URL, Redirect URI, and Tenant Domain Name. The form is titled 'Innovapptive Dev' and has 'Cancel' and 'Save' buttons at the top right.

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

Figure 3-3 Add Tenant ERP Details

The screenshot shows the 'Innovapptive Dev' tenant management interface. The '2. ERPs' tab is selected, and the 'SAP Details' section is visible. The fields are as follows:

Field	Value
Base URL	https://10.0.0.112/sap/opu/odata/INVCCEC/RACE_SRV/
OAuth2 URL	https://10.0.0.111/sap/bc/sec/oauth2/token
User Name	cwpuser
Password	*****
Grant Type	urn:ietf:params:oauth:grant-type:saml2-bearer
Client ID	cwpuser
Scope	{ "race": "/INVCCEC/RACE_SRV_0001",

5. In the **Protected Resources** tab, do the following:

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

Figure 3-4 Add Tenant Resources Details

The screenshot shows the 'Innovapptive Dev' configuration interface. The top navigation bar includes the 'Innovapptive Dev' logo and a 'Tenant Management' dropdown. The main content area has a sidebar with navigation icons and a tabbed interface. The tabs are: 1. PRIMARY, 2. ERPs, 3. PROTECTED RESOURCES (active), 4. DB CONFIGURATIONS, 5. COLLABORATION, 6. CONFIGURATIONS, and 7. ASSETS. The 'PROTECTED RESOURCES' tab is active, displaying 'SAP Details' and 'SAP URLs' sections.

SAP Details

- Identity Metadata URL:
- Issuer URL:
- Client ID:
- Audience:
- Scope:

SAP URLs

- URL:
- URL:

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

Figure 3-5 Add Tenant Database Details

The screenshot shows the 'Innovapptive Dev' tenant management interface. The '4. DB CONFIGURATIONS' tab is active, displaying a form for adding tenant database details. The form includes the following fields:

- Host:** cwp-tenant.cq5h22u2n8lu.us-east-1.rds.amazonaws.com
- Port:** 3306
- User:** admin
- Password:** (masked with asterisks)
- Database:** InnovapptiveDev
- Dialect:** mysql

Below these fields, there is a section for 'NoSQL' with a 'Host' field. The interface also features a sidebar with navigation icons and a top bar with 'Cancel' and 'Save' buttons.

7. In the **Collaboration** tab, enter the following:

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

Innovapptive Dev

Tenant Management > Innovapptive Dev

Cancel Save

1. PRIMARY 2. ERPs 3. PROTECTED RESOURCES 4. DB CONFIGURATIONS **5. COLLABORATION** 6. CONFIGURATIONS 7. ASSETS

Collaboration Type

Collaboration Type
Slack

Slack Configuration

Slack Workspace/Team ID
T78857ZCK

Client ID
246277271427.3457776076497

Client Secret
4ee5ea193c851b30f0085e388c4ed162

Client Signing Secret
9415017c609aec548a1d338ca1c5950e

Client State Secret
my-client-state-secret

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

Figure 3-6 Add Tenant Configuration Details

Innovapptive Dev

Tenant Management > Innovapptive Dev

Cancel Save

1. PRIMARY 2. ERPs 3. PROTECTED RESOURCES 4. DB CONFIGURATIONS 5. COLLABORATION **6. CONFIGURATIONS** 7. ASSETS

Licence Count

25

Products

MWORKORDER, MINVENTORY

Modules

Dashboard, Tenant Management, Maintenance Control Center, ...

Log DB Type

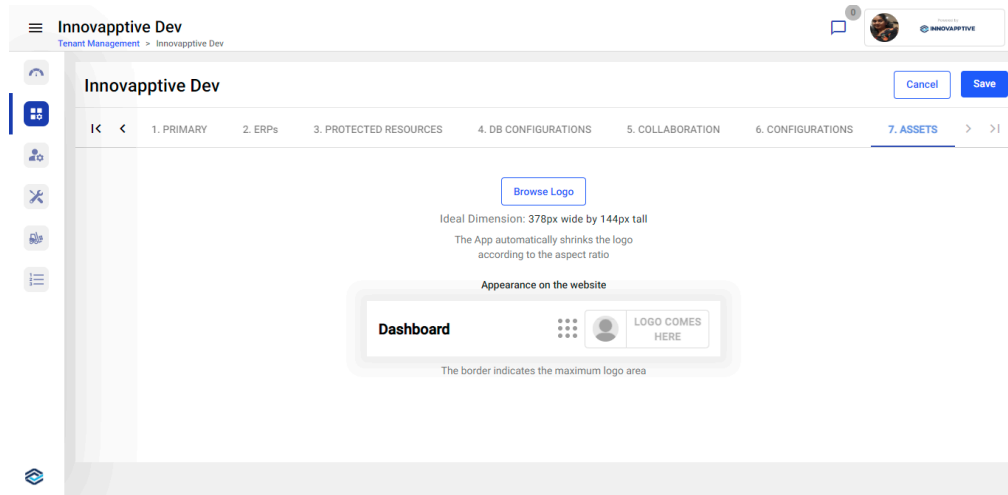
rdbms

Log Level

off

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

Figure 3-7 Add Logo



10. Click the **Save** button.

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

4. Create and Manage Master Data

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

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

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

This chapter has the following topics:

- [Create Plants \(on page 49\)](#)
- [Create Shifts \(on page 51\)](#)
- [Create Locations \(on page 53\)](#)
- [Create Assets \(on page 57\)](#)
- [Create Unit of Measurement \(on page 59\)](#)
- [Create Global Response Set \(on page 62\)](#)

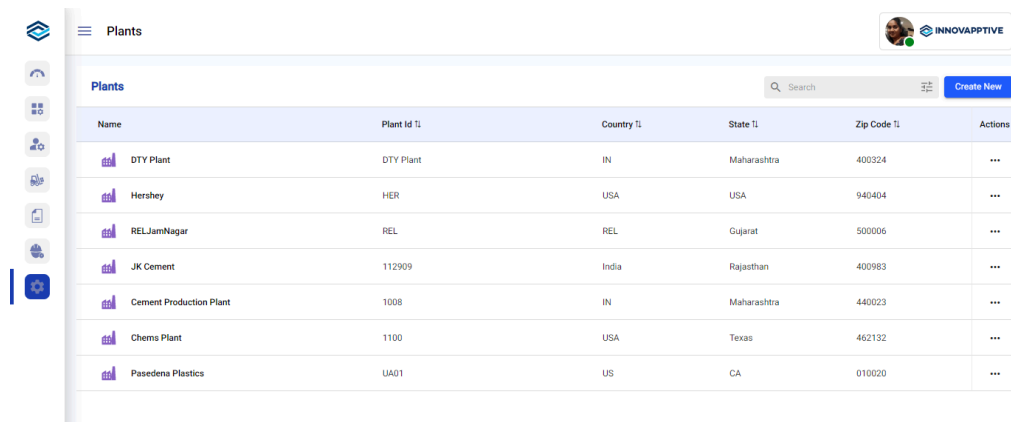
4.1. Create Plants

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

To create or add a plant:

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

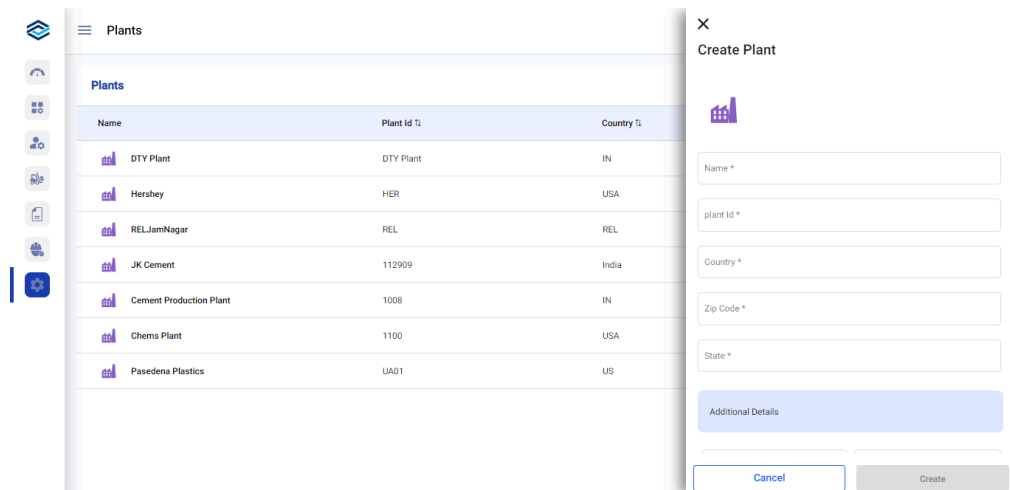
Figure 4-1 Plants Screen



Name	Plant Id	Country	State	Zip Code	Actions
DTY Plant	DTY Plant	IN	Maharashtra	400324	...
Hershey	HER	USA	USA	940404	...
RELJamNagar	REL	REL	Gujarat	500006	...
JK Cement	112909	India	Rajasthan	400983	...
Cement Production Plant	1008	IN	Maharashtra	440023	...
Chems Plant	1100	USA	Texas	462132	...
Pasadena Plastics	UA01	US	CA	010020	...

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

Figure 4-2 Add Plant Details



Create Plant

Name *

Plant Id *

Country *

Zip Code *

State *

Additional Details

Cancel Create

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



Note:

If the Plant ID already exists, an error message "Plant ID <> already exists" is displayed. Use another ID.

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

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



Note:

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

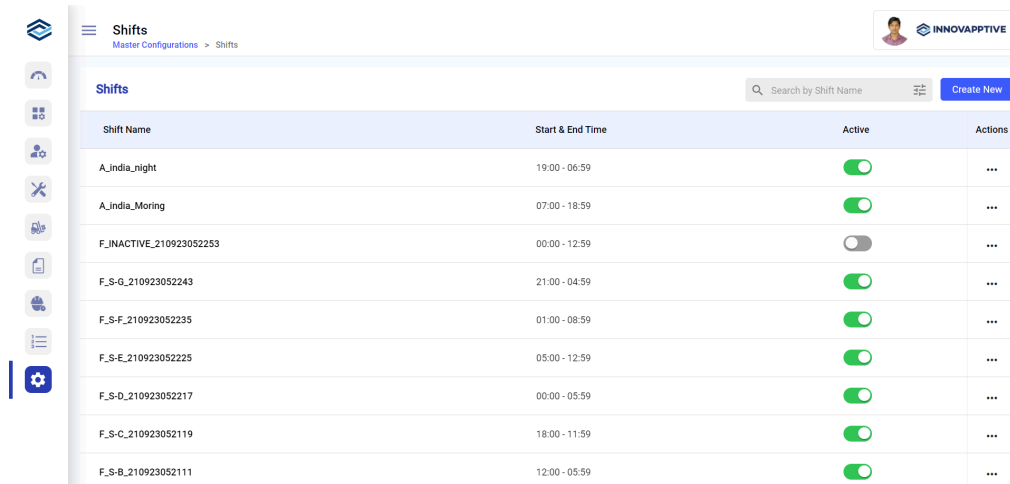
4.2. Create Shifts

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

To create or add a shift:

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

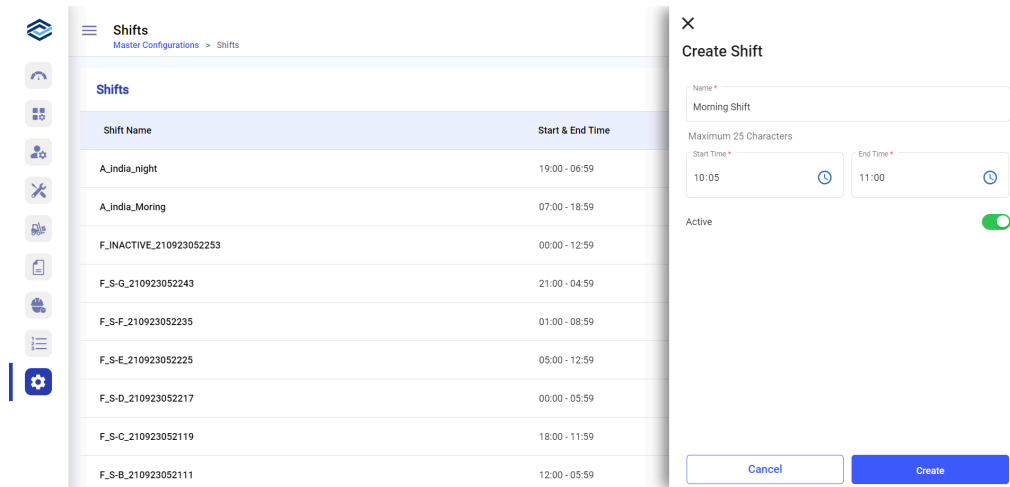
Figure 4-3 Shifts Screen



Shift Name	Start & End Time	Active	Actions
A_india_night	19:00 - 06:59	☒	...
A_india_Morning	07:00 - 18:59	☒	...
F_INACTIVE_210923052253	00:00 - 12:59	☐	...
F_S-G_210923052243	21:00 - 04:59	☒	...
F_S-F_210923052235	01:00 - 08:59	☒	...
F_S-E_210923052225	05:00 - 12:59	☒	...
F_S-D_210923052217	00:00 - 05:59	☒	...
F_S-C_210923052119	18:00 - 11:59	☒	...
F_S-B_210923052111	12:00 - 05:59	☒	...

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

Figure 4-4 Add Shift Details



Shifts

Master Configurations > Shifts

Shifts

Search by Shift Name

Create New

Shift Name	Start & End Time
A_india_night	19:00 - 06:59
A_india_Morning	07:00 - 18:59
F_INACTIVE_210923052253	00:00 - 12:59
F_S-G_210923052243	21:00 - 04:59
F_S-F_210923052235	01:00 - 08:59
F_S-E_210923052225	05:00 - 12:59
F_S-D_210923052217	00:00 - 05:59
F_S-C_210923052119	18:00 - 11:59
F_S-B_210923052111	12:00 - 05:59

×

Create Shift

Name *

Morning Shift

Maximum 25 Characters

Start Time *

10:05

End Time *

11:00

Active

☒

Cancel

Create

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

4. Click **Create**.

The new shift is created successfully.



Note:

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

4.3. Create Locations

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



Note:

You can download already created data from SAP through synchronization.

To create or add a location:

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

Figure 4-5 Locations Screen

Name	Description TI	Model TI	Parent TI	Actions
Mine Site 1 10118513-1006B	N/A	GM	California Mine	...
Mine Site 2 10118512-1005C	N/A	N/A	California Mine	...
California Mine 8503-MIN-AA-AA	N/A	N/A		...
Excavators 8503-MIN-AA	N/A	GE	California Mine	...
Pump House FNPP-PH-1			Fukushima Nuclear Power Plant	...
Reactor Room FNPP-RB-1			Turbine Room	...
Turbine Room FNPP-TB-1			Fukushima Nuclear Power Plant	...
Power Plant (Area_001) 1000-100	N/A	N/A		...
Fukushima Nuclear Power Plant FNPP-1				...

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

Or

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

Or

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



Note:

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

Figure 4-6 Add Location Details

The screenshot shows the 'Locations' configuration window. On the left is a sidebar with various icons. The main area displays a table of existing locations. To the right, a 'Create Location' modal is open, showing fields for Name, Location Id, Model, Description, Plant, and Parent, along with a checkbox to 'Mark this location as Unit' and 'Cancel'/'Create' buttons.

Name	Plant T1	Marked as Unit T1	Description T1
LOC-013 LOC-013		Yes	LOC-013
LOC-012 LOC-012		Yes	LOC-012
LOC-011 LOC-011		Yes	LOC-011
LOC-010 LOC-010		No	LOC-010
LOC-009 LOC-009		Yes	LOC-009
LOC-008 LOC-008		Yes	LOC-008
LOC-007 LOC-007		Yes	LOC-007
LOC-006 LOC-006		Yes	LOC-006

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



Note:

If the Location ID already exists, an error message "Location ID <> already exists" is displayed. Use another ID.

4. Select the **Mark this location as Unit** to assign users, round plans, and shift handovers at unit level.
5. Under **Coordinates**, Enter **Latitude** (–90 to +90) and **Longitude** (–180 to +180) as numeric values, or enter an **Address**.
6. Entering an address auto-fills latitude and longitude, and entering latitude and longitude auto-fills the address.
7. Click **Create**.

The new location is created successfully.



Note:

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

Edit Location ID

Administrators can now update Functional Location (FLOC) display IDs and modify location hierarchy relationships without recreating locations or affecting existing records. Open rounds, findings, and issues automatically reflect updated Location IDs, while submitted records continue to display the original ID captured during execution.

When a location hierarchy changes, existing Round Plans are not automatically modified. Instead, impacted plans display a Hierarchy Changed indicator so supervisors can review and republish plans if required.



Note:

Before using this feature, the following feature flags must be enabled in the Integration Manager by your Tenant Administrator:

- enableLocationMasking = true
- enableMasterdatamasking = true

To edit a Location ID:

1. Click the Master Configuration module on the left-side pane and click Locations.
2. Click the More (⋮) icon next to the location whose ID you want to change and select Edit ID.
3. In the Edit ID dialog, enter the New ID in the Location ID field.
4. Click Update.

The Location ID is updated. All open work items immediately reflect the new ID.

What happens when a Location ID changes:

- Open work items (status: Open, Assigned, or In Progress) automatically display the updated Location ID.
- Closed records (status: Submitted, Approved, or Rejected) continue to show the ID captured at the time of completion and are not changed.
- Searching by a historical (old) ID still resolves to the correct location. The system displays a banner indicating the ID is historical and shows the current ID alongside it.
- A full ID history is recorded for every change: old ID, new ID, changed by, date and time, and an optional reason.

4.4. Create Assets

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



Note:

You can download already created data from SAP through synchronization.

To create or add an asset:

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

Or

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

Or

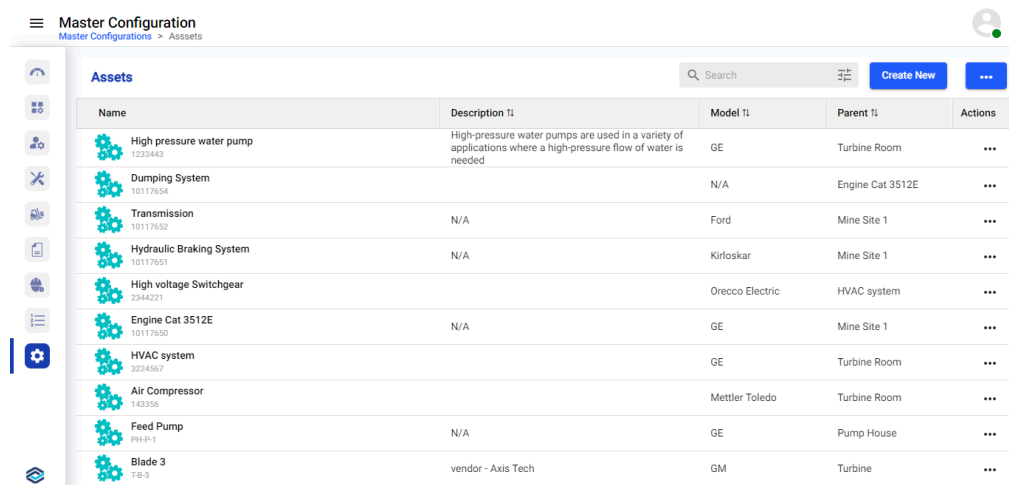
The data synchronization can automatically occurs based on the configured schedule.



Note:

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

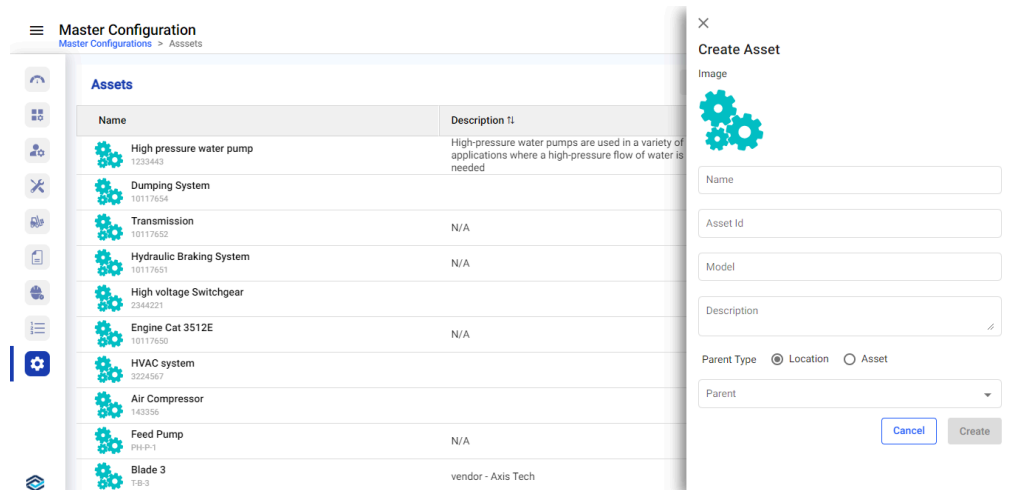
Figure 4-7 Assets Screen



Name	Description	Model	Parent	Actions
High pressure water pump 1233443	High-pressure water pumps are used in a variety of applications where a high-pressure flow of water is needed	GE	Turbine Room	...
Dumping System 10117654		N/A	Engine Cat 3512E	...
Transmission 10117652	N/A	Ford	Mine Site 1	...
Hydraulic Braking System 10117651	N/A	Kirloskar	Mine Site 1	...
High voltage Switchgear 2344221		Orecco Electric	HVAC system	...
Engine Cat 3512E 10117650	N/A	GE	Mine Site 1	...
HVAC system 3224567		GE	Turbine Room	...
Air Compressor 143356		Mettler Toledo	Turbine Room	...
Feed Pump P44-P-1	N/A	GE	Pump House	...
Blade 3 T-B-3	vendor - Axis Tech	GM	Turbine	...

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

Figure 4-8 Add Asset Details



Master Configuration

Master Configurations > Assets

Assets

Name	Description
High pressure water pump 1233443	High-pressure water pumps are used in a variety of applications where a high-pressure flow of water is needed
Dumping System 10117654	
Transmission 10117652	N/A
Hydraulic Braking System 10117651	N/A
High voltage Switchgear 2344221	
Engine Cat 3512E 10117650	N/A
HVAC system 3224567	
Air Compressor 143356	
Feed Pump P44-P-1	N/A
Blade 3 T-B-3	vendor - Axis Tech

Create Asset

Image

Name

Asset Id

Model

Description

Parent Type ☒ Location ☐ Asset

Parent

Cancel Create

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



Note:

If the Asset ID already exists, an error message "Asset ID <> already exists" is displayed. Use another ID.

4. Click **Create**.

The new asset is created successfully.

**Note:**

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

4.5. Create Unit of Measurement

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

To add a unit of measurement:

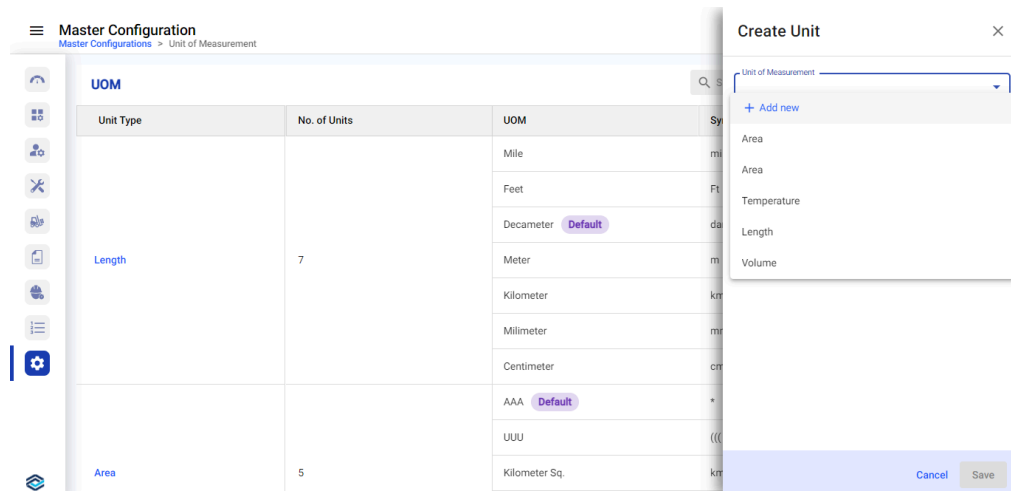
1. Click the **Master Configuration** module on the left side pane and click **Unit of Measurement**.

Figure 4-9 UOM Screen

Unit Type	No. of Units	UOM	Symbol	Status	Actions
Length	7	Mile	mi	Active	...
		Feet	ft	Active	...
		Decameter Default	dam	Active	...
		Meter	m	Active	...
		Kilometer	km	Active	...
		Millimeter	mm	Active	...
		Centimeter	cm	Active	...
Area	5	AAA Default	*	Active	...
		UUU	(((	Inactive	...
		Kilometer Sq.	km*2	Active	...

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

Figure 4-10 Create UOM

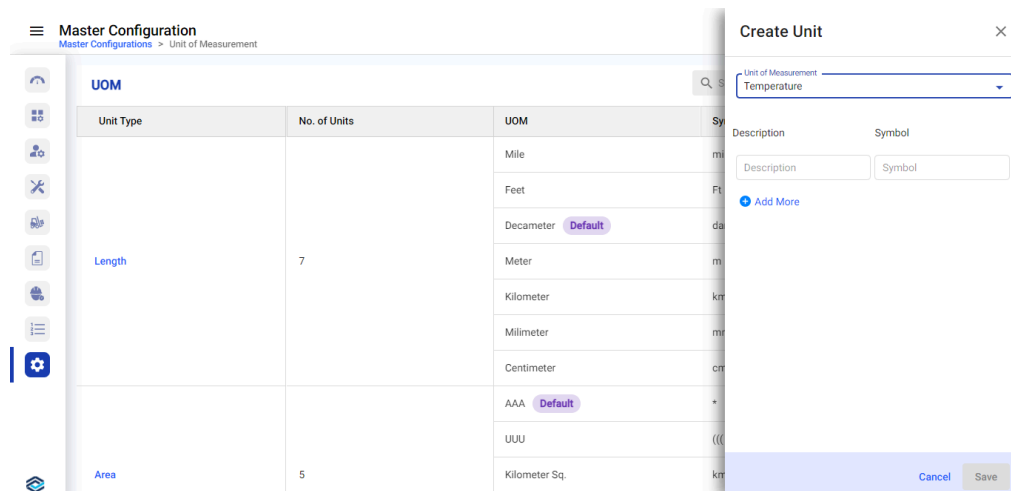


Note:

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

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

Figure 4-11 Add UOM Details



Note:

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

5. Click **Save**.

The unit of measurement is created successfully.



Note:

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

4.5.1. Activate and Deactivate Unit of Measurement

To activate/deactivate unit of measurement:

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

A message UOM status changed successfully appears.

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

Figure 4-12 Activate or Deactivate UOM

Unit Type	No. of Units	UOM	Symbol	Status	Actions
Length	7	Mile	mi	☒	...
		Feet	ft	☒	...
		Decameter Default	dam	☒	...
		Meter	m	☒	...
		Kilometer	km	☒	...
		Millimeter	mm	☒	...
		Centimeter	cm	☒	...
Area	5	AAA Default	*	☒	...
		UUU	(((	☐	...
		Kilometer Sq.	km*2	☒	...

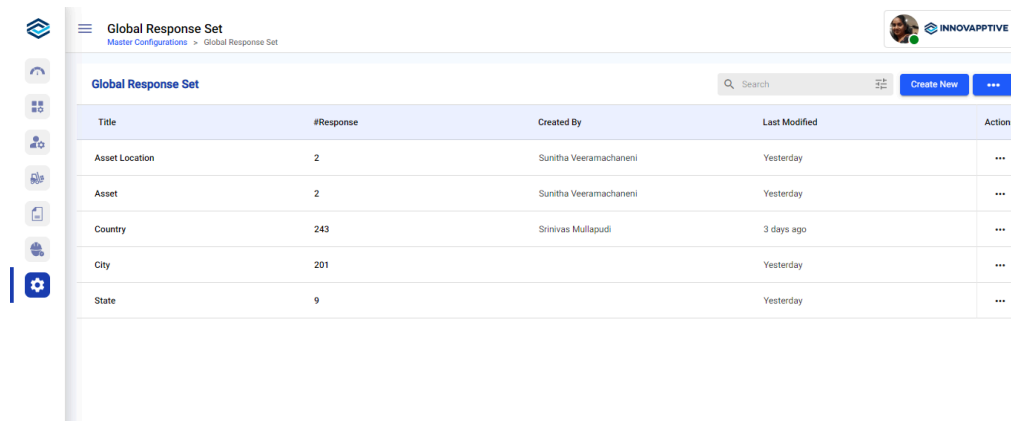
4.6. Create Global Response Set

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

To create or add global response set:

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

Figure 4-13 Global Response Set Screen

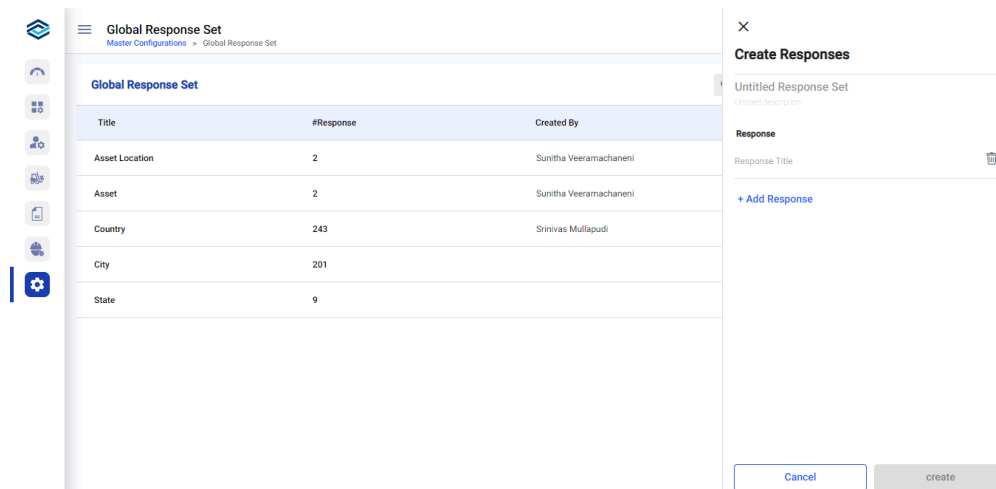


The screenshot shows the 'Global Response Set' screen. On the left is a sidebar with icons for various modules, with the 'Master Configuration' icon (a gear) highlighted. The main area has a header 'Global Response Set' with a search bar and a 'Create New' button. Below the header is a table with the following data:

Title	#Response	Created By	Last Modified	Actions
Asset Location	2	Sunitha Veeramachaneni	Yesterday	...
Asset	2	Sunitha Veeramachaneni	Yesterday	...
Country	243	Srinivas Mullapudi	3 days ago	...
City	201		Yesterday	...
State	9		Yesterday	...

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

Figure 4-14 Add Global Set Response Details



The screenshot shows the 'Add Global Set Response Details' dialog box. The dialog has a title bar 'Create Responses' and a close button (X). Below the title bar is a section 'Untitled Response Set' with a description field. The main area is labeled 'Response' and contains a 'Response Title' field. At the bottom, there are two buttons: 'Cancel' and 'create'.

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



Note:

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

4. Click **Apply**.

The response set is created successfully.



Note:

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

4.7. Bulk Upload Master Data

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

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



Note:

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

Location Master Data

To bulk upload locations:

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

An excel sheet that contains sample location information is downloaded.

3. Open the excel sheet and delete sample data.
4. Add location data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.

The file is uploaded successfully. You can open it and update the details as required.

Asset Master Data

To bulk upload assets:

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

An excel sheet that contains sample asset information is downloaded.

3. Open the excel sheet and delete sample data.
4. Add asset data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.

The file is uploaded successfully. You can open it and update the details as required.

UOM Master Data

To bulk upload unit of measurement:

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

An excel sheet that contains sample UOM information is downloaded.

3. Open the excel sheet and delete sample data.
4. Add UOM data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.

The file is uploaded successfully. You can open it and update the details as required.

Global Response Set Master Data

To bulk upload global response set master data:

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

An excel sheet that contains sample global response set information is downloaded.

3. Open the excel sheet and delete sample data.
4. Add global response set data in the sheet.
5. Click **Create New** and select **Upload Excel**.
6. Select a file from the folder and click **Open** to upload the excel sheet.

The file is uploaded successfully. You can open it and update the details as required.

5. Onboard Users and Assign Roles

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

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

In this module, you can,

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



Note:

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

5.1. Create Positions

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

To create a position:

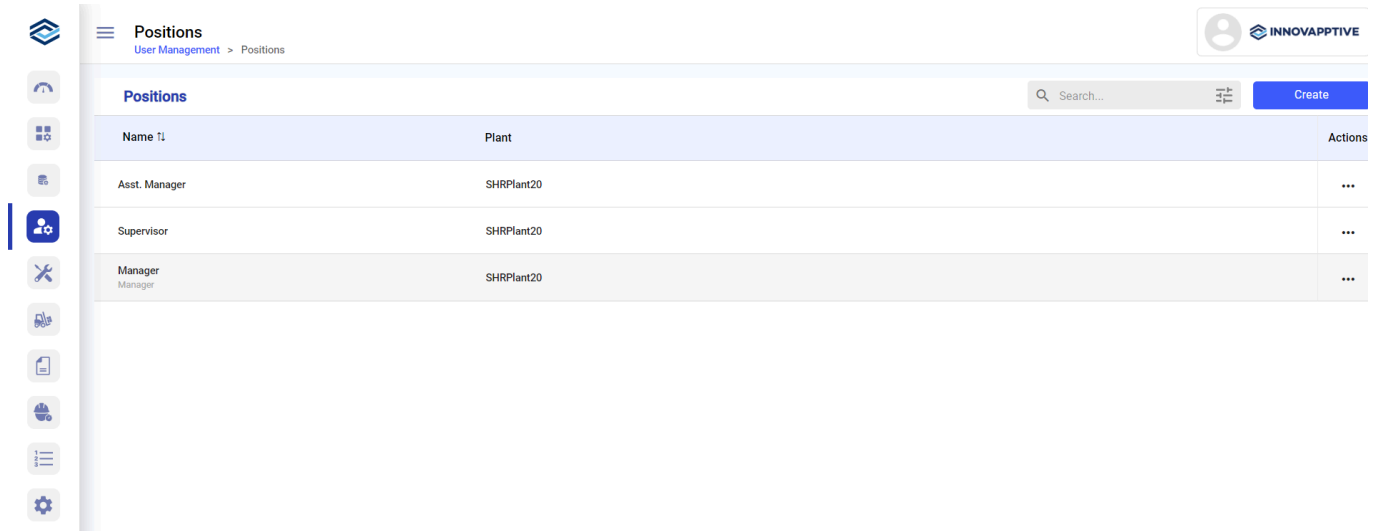
1. Expand the **User Management** module and select **Positions** on the left-side menu.



Note:

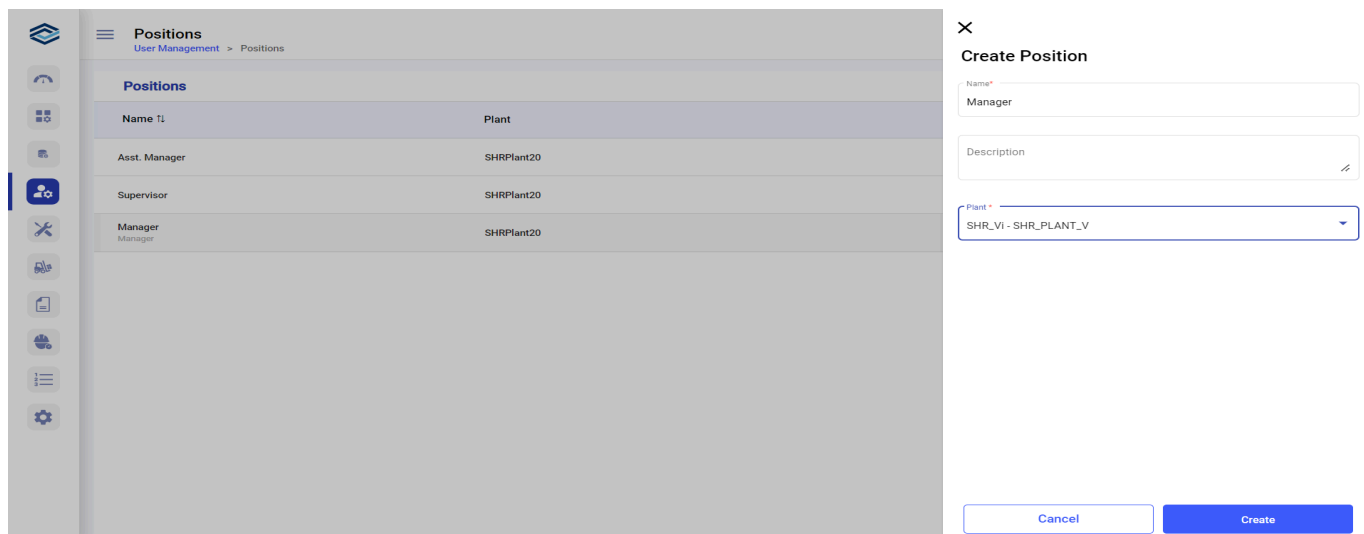
To see the Create Positions module, click the Hamburger  menu on the top left and then click the Expand  icon next to User Management.

Figure 5-1 Positions Screen



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

Figure 5-2 Create Position



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

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

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

In this screen, you can,

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

5.2. Create Roles and Assign Permissions

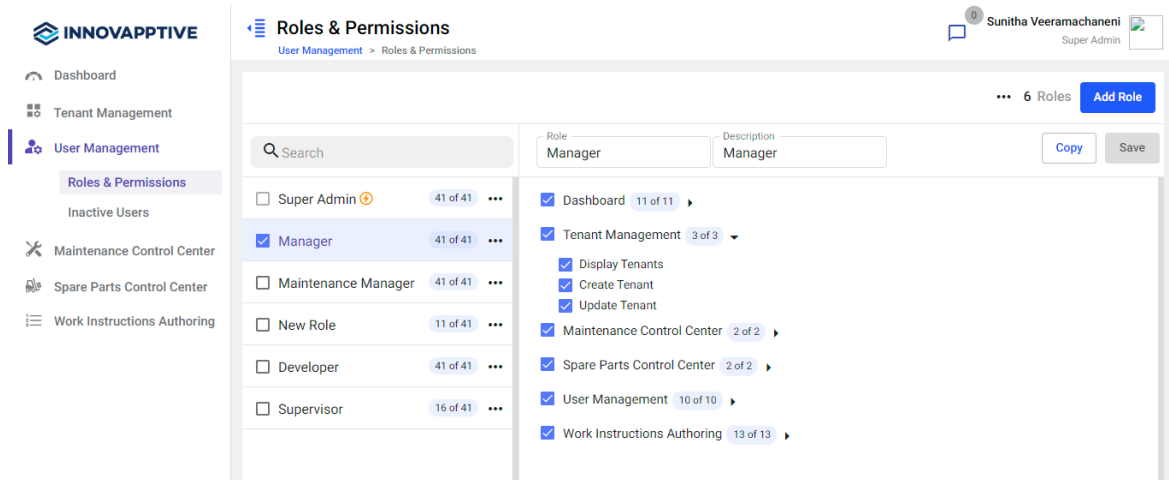
Roles and Permissions define **who can access what** within the system, ensuring secure and efficient workflow management. By assigning roles such as **Super Admin**, **Admin**, **Supervisor**, **Manager**, **Operator**, and **Technician**, you can control user access based on job responsibilities.

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

To create a role and assign permissions:

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

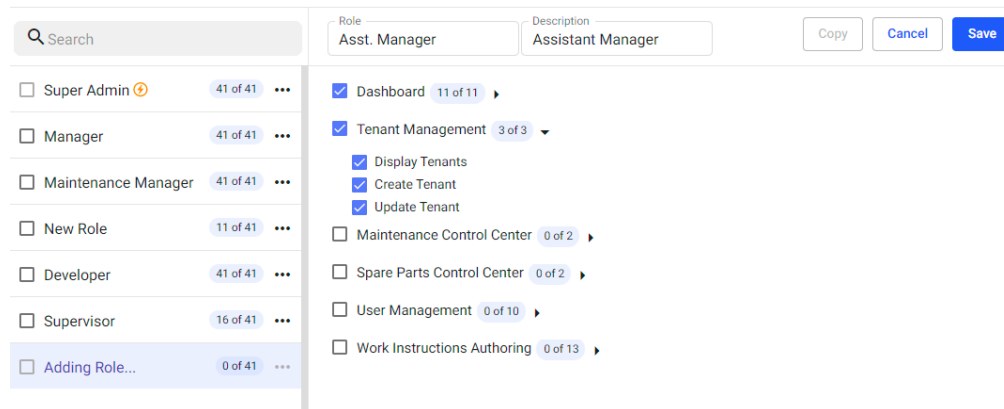
Figure 5–3 Roles and Permissions Screen



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

Expand the down arrow icon to select the sub-modules.

Figure 5–4 Add Role Details



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

In this sub module, you can,

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



Note:

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

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



Note:

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

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

5.3. Create Users and Assign Roles

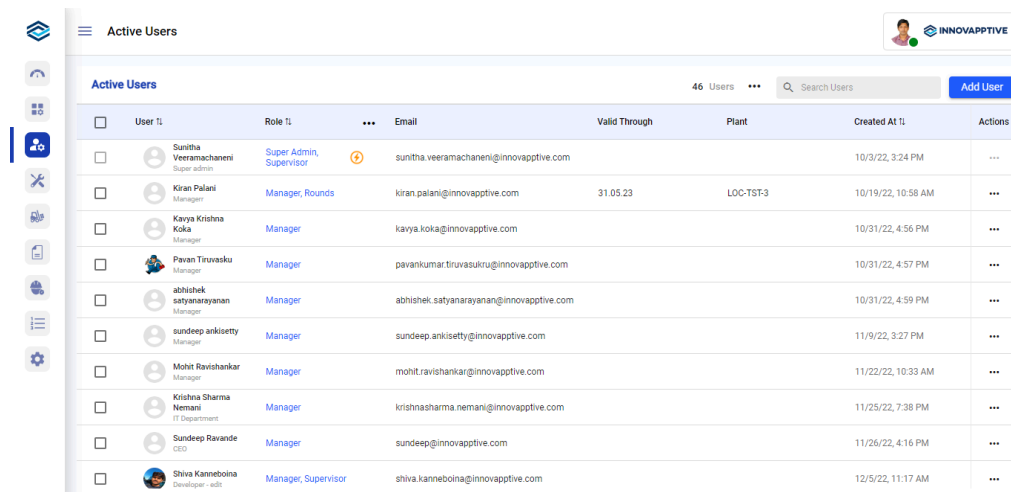
Creating users allows you to add personnel to the system and assign them appropriate roles and permissions. When adding a new user, you define their role (such as Supervisor, Technician, or Manager) and configure their access permissions based on the modules they need.

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

To create a user and assign a role:

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

Figure 5-5 User Management Module



☐	User Info	Role	Email	Valid Through	Plant	Created At	Actions
☐	Sunitha Veeramachaneni Super Admin	Super Admin, Supervisor	sunitha.veeramachaneni@innovapptive.com			10/3/22, 3:24 PM	...
☐	Kiran Palani Manager	Manager, Rounds	kiran.palani@innovapptive.com	31.05.23	LOC-TST-3	10/19/22, 10:58 AM	...
☐	Kanya Krishna Manager	Manager	kanya.krishna@innovapptive.com			10/31/22, 4:56 PM	...
☐	Paran Tiruvasku Manager	Manager	pavankumar.tiruvasku@innovapptive.com			10/31/22, 4:57 PM	...
☐	abhishek satyanarayanan Manager	Manager	abhishek.satyanarayanan@innovapptive.com			10/31/22, 4:59 PM	...
☐	sundee ankisetty Manager	Manager	sundee.ankisetty@innovapptive.com			11/9/22, 3:27 PM	...
☐	Mohit Ravishankar Manager	Manager	mohit.ravishankar@innovapptive.com			11/22/22, 10:33 AM	...
☐	Krishna Sharma Nemani IT Department	Manager	krishnasharma.nemani@innovapptive.com			11/25/22, 7:38 PM	...
☐	Sundee Ravande CEO	Manager	sundee@innovapptive.com			11/26/22, 4:16 PM	...
☐	Shiva Kanneboina Developer - web	Manager, Supervisor	shiva.kanneboina@innovapptive.com			12/5/22, 11:17 AM	...

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



Note:

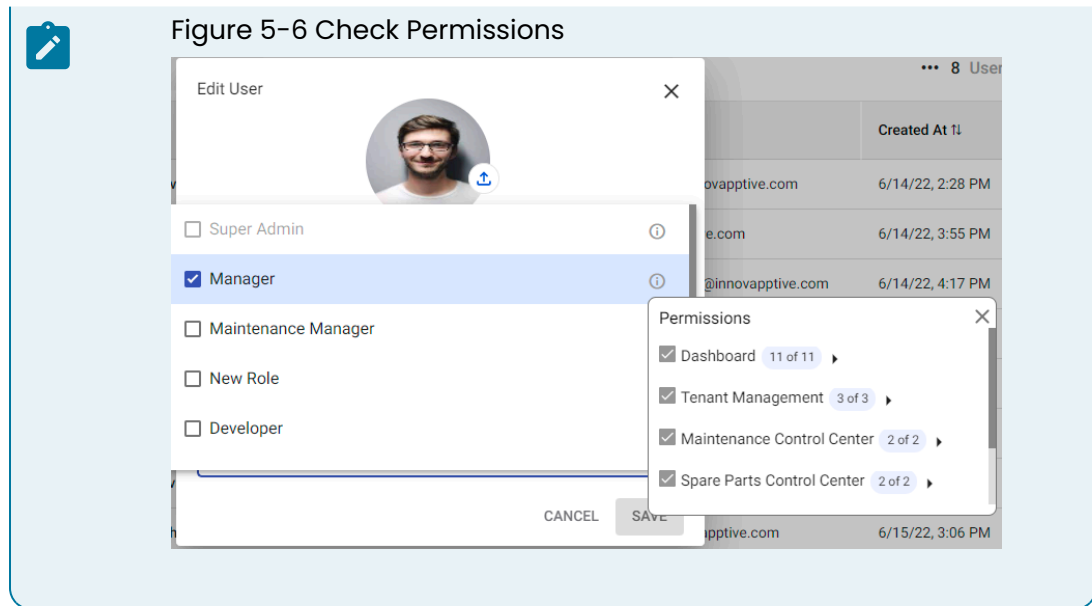
You can maintain two separate email addresses to access both the Web and Mobile applications.

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



Note:

You can click the More Info icon to check the permissions assigned to the particular role.



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



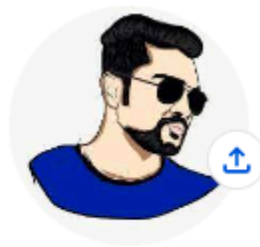
Note:

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

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

Figure 5-7 Add User Details

Add User



First Name

Jhonny

Last Name

Depp

Title

Manager

Email

cwpdemo@innovapptive.com

Roles

Manager

CANCEL

SAVE

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

5.4. Create User Groups and Add Users

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

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

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

To create a user group and assign it to user:

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

Figure 5-8 User Groups Screen

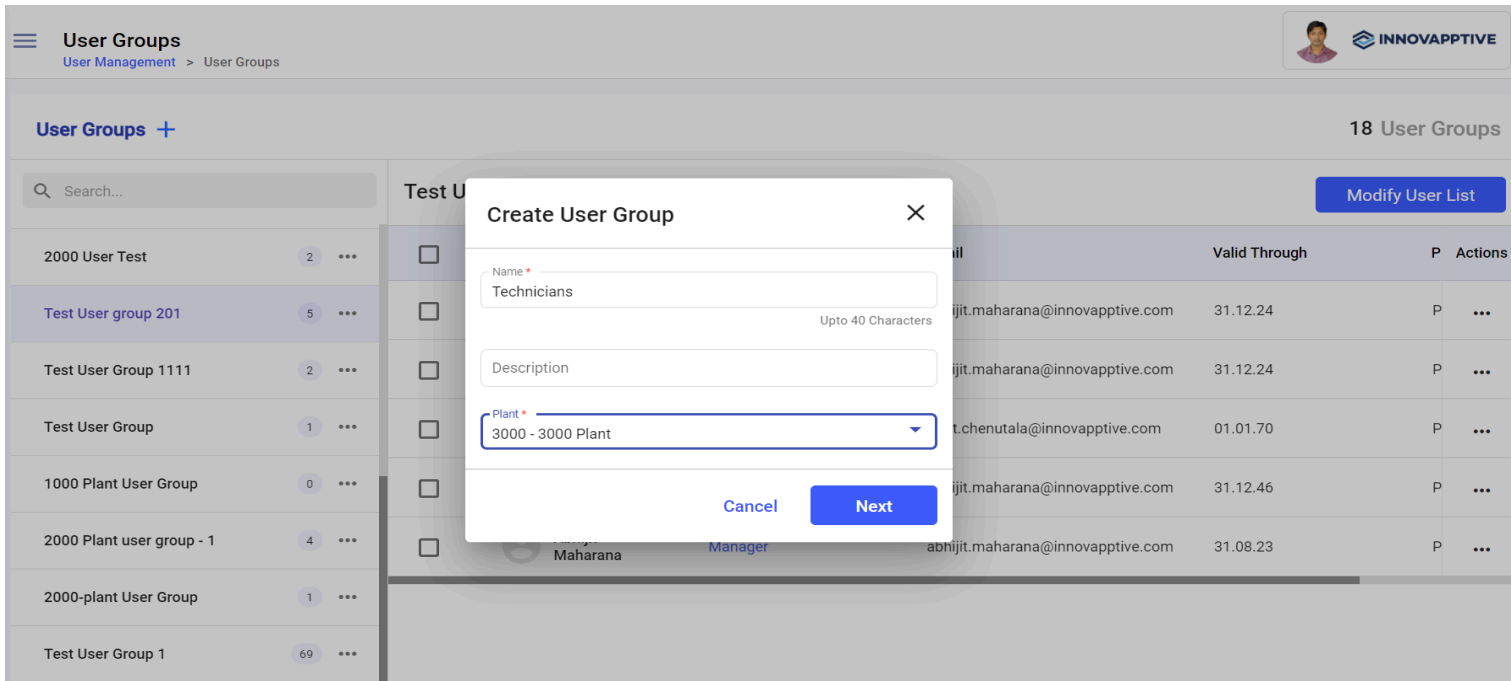
The screenshot displays the 'User Groups' interface. On the left, a sidebar lists various user groups. The main area on the right shows the details for 'Test User group 201', including a table of assigned users.

☐	User ID	Role ID	Email	Valid Through	P	Actions
☐	Abhijit Maharana	Manager	abhijit.maharana@innovapptive.com	31.12.24	P	...
☐	Abhijit Maharana	Manager	abhijit.maharana@innovapptive.com	31.12.24	P	...
☐	Rohit Chenutala	Manager	rohit.chenutala@innovapptive.com	01.01.70	P	...
☐	Abhijit Maharana	Manager	abhijit.maharana@innovapptive.com	31.12.46	P	...
☐	Abhijit Maharana	Manager	abhijit.maharana@innovapptive.com	31.08.23	P	...

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

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

Figure 5-9 Add User Group Details



5. In the **Select Users** window, select relevant users and click **Create**.

The user group is created and you can see it on the left section.

In this screen, you can,

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

Modify User List

To modify users list:

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

Figure 5-10 Modify Users

←

Select Users

71 Users

	User ↑↓	Role ↑↓	...	Email
☒	abhijit maharana	Manager		abhijit.maharana@innovapptive.com
☐	Vishnubhatla Swamy	Manager		vishnubhatla.swamy@innovapptive.com
☐	Kavya Krishna Koka	Manager		kavya.koka@innovapptive.com
☐	Mohit Ravishankar	Manager		mohit.ravishankar@innovapptive.com
☐	Sanjay Vallakati			sanjay.vallakati@innovapptive.com
☒	Rohit Chenutala	Manager		rohit.chenutala@innovapptive.com
☐	Rashmi Pansari	Manager		rashmi.pansari@innovapptive.com

7 Users Selected

Cancel

Done

The users are removed from the user group.

**Note:**

You can also,

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

6. Invoke mRounds Tasks using APIs

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

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

6.1. Generating API Keys

This section describes the process for generating API keys

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



Note:

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

6.1.1. Pre-requisites

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

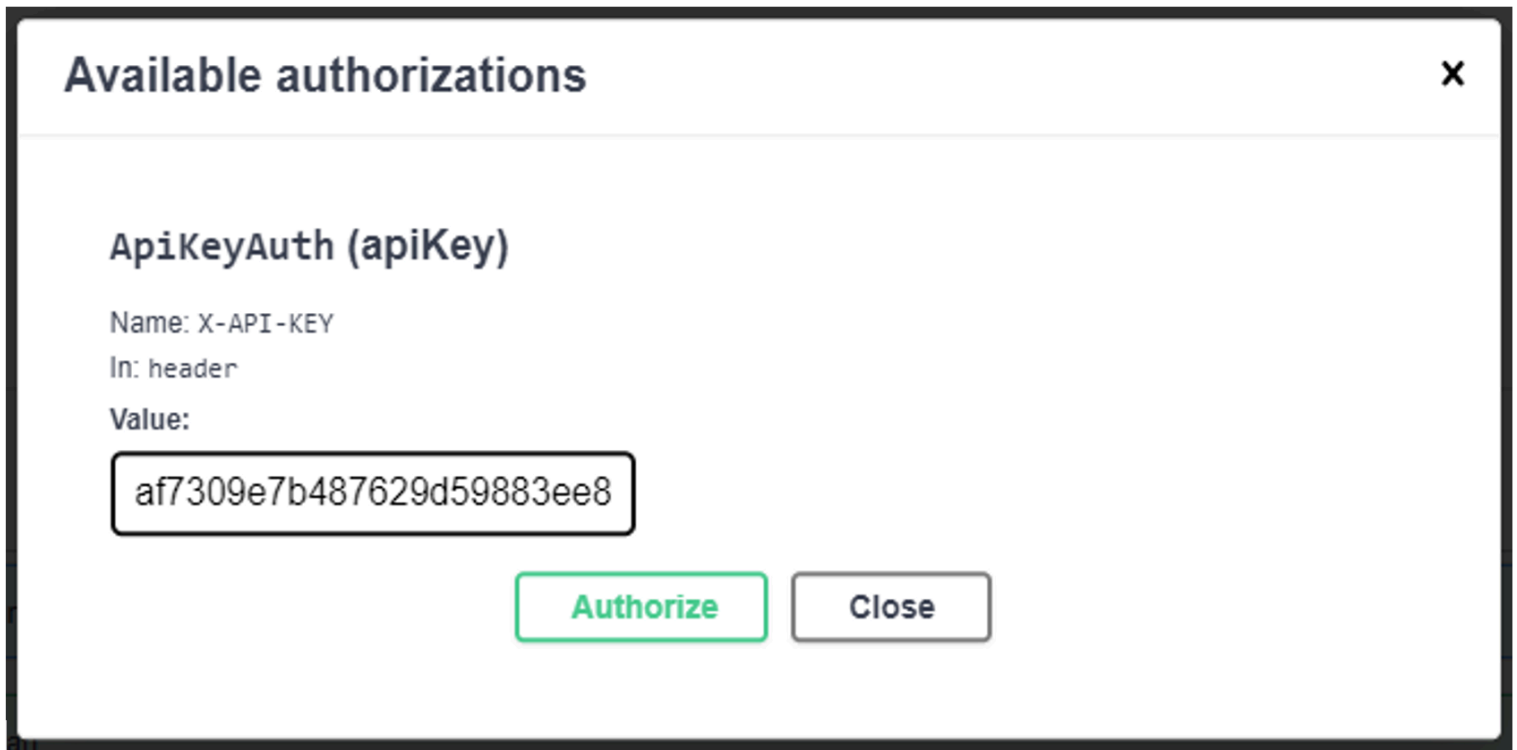
Server variables

protocol	https
host	cwpuat2.innovapptive.com
basePath	/operatorroundsapi

Host: Select the host based on the environment:

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

Authorize through API Key

A dialog box titled "Available authorizations" with a close button (X) in the top right corner. The dialog contains the text "ApiKeyAuth (apiKey)" followed by "Name: X-API-KEY", "In: header", and "Value:". Below the "Value:" label is a text input field containing the API key "af7309e7b487629d59883ee8". At the bottom of the dialog are two buttons: "Authorize" (highlighted with a green border) and "Close".

Available authorizations X

ApiKeyAuth (apiKey)

Name: X-API-KEY

In: header

Value:

af7309e7b487629d59883ee8

Authorize **Close**

6.1.2. Generate API Keys

Learn how to generate API keys

To generate the API key:

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

6. Click **Generate**.

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

Innovapptive
Tenant Management > Innovapptive

Innovapptive

Cancel Save

3. PROTECTED RESOURCES 4. DB CONFIGURATIONS 5. COLLABORATION 6. CONFIGURATIONS 7. ASSETS 8. API Keys

Description

Expires
180 days (6 months)

Generate

Description	Expires	API Key	Actions
API Key generated on Wed Jul 26 2023	2024-01-26	0bbeba3f51320f85515930635eabaa0c706da5b5d2763a0518674a7e351c5d13	...
Testing API Key	2023-08-27	7f5bc64812be804960016017be3b478bccdec4ce806afa597446bb0b838db4f2	...



Note:

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

6.2. Creating Rounds using APIs

Learn how to create rounds using APIs

To create round through an API:

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

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

The screenshot shows the configuration for the `POST /external/round-plans` endpoint. The description states: "Creates round plan and publish the same based on the round plan information". Under the "Parameters" section, there are two required header parameters: `tenantid` and `email`, each with an input field. "Cancel" and "Reset" buttons are located in the top right corner of the parameters section.

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

The screenshot shows the "Request body" section with the media type set to `application/json`. The "Round plan object" section contains a JSON payload. The JSON structure is as follows:

```
{
  "name": "API 2 Testing",
  "description": "All Response Types",
  "plantId": "1000",
  "locationId": "123-XL-BA39",
  "pages": [
    {
      "name": "page1",
      "sections": [
        {
          "name": "section1",
          "tasks": [
            {
              "name": "Read Only Field",
              "responseType": "LF",
              "value": "Read Only Field Testing"
            }
          ]
        }
      ]
    },
    {
      "name": "Instructions",
      "responseType": "TEXT"
    }
  ]
}
```



Note:

Please refer to the [Request body JSON for Round Plan Creation Payload Formation \(on page 80\)](#) section for more information.

6.2.1. Request body JSON for Round Plan Creation Payload Formation

Header Information Payload

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

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

```



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

Response Type Configuration Payload

Read Only

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

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

Instruction Response Type

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

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

Short Text Answer

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

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

Long Text Answer

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

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

```

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

```

Number Response Type

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

```

"rangeMetadata": {"min": 0, "max": 10, "minMsg": "Test message", "maxMsg": "",
"minAction": "Warning", "maxAction": "None"

```

```

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

```

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

Global Picklist Single Selection

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

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

Global Picklist Multiple Selection

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

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

Scanner

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

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

Date & Time

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

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

Hyperlink

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

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

Check box

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

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

Signature

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

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

Photo Response

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

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

Geo Location Response

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

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

Date Range

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

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

Multiple Choice

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

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

Slider

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

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

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

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



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

```

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

```

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

```
        {
            "name": "Signature Testing",
            "responseType": "SGF",
            "required": false,
            "value": ""
        },
        {
            "name": "Photo Testing",
            "responseType": "ATT",
            "required": false,
            "value": ""
        },
        {
            "name": "Geo Location Testing",
            "responseType": "GAL",
            "required": false,
            "value": ""
        },
        {
            "name": "Date range Testing",
            "responseType": "DFR",
            "required": false,
            "value": ""
        }
    ]
}

]

},
{
    "name": "page2",
    "sections": [
        {
            "name": "section1",
            "tasks": [
                {
                    "name": "Multiple Choice Answers Testing",
                    "responseType": "VI",
```

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

6.3. Dynamically Generate and Partially Execute a Round

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

Create and publish a round plan with tasks.

To create a round plan:

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



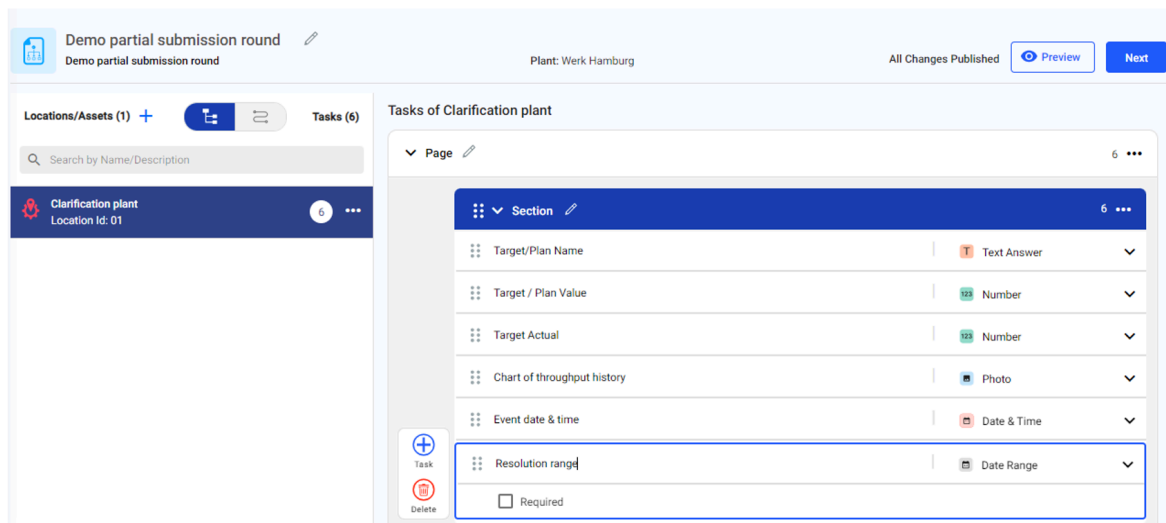
Note:

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

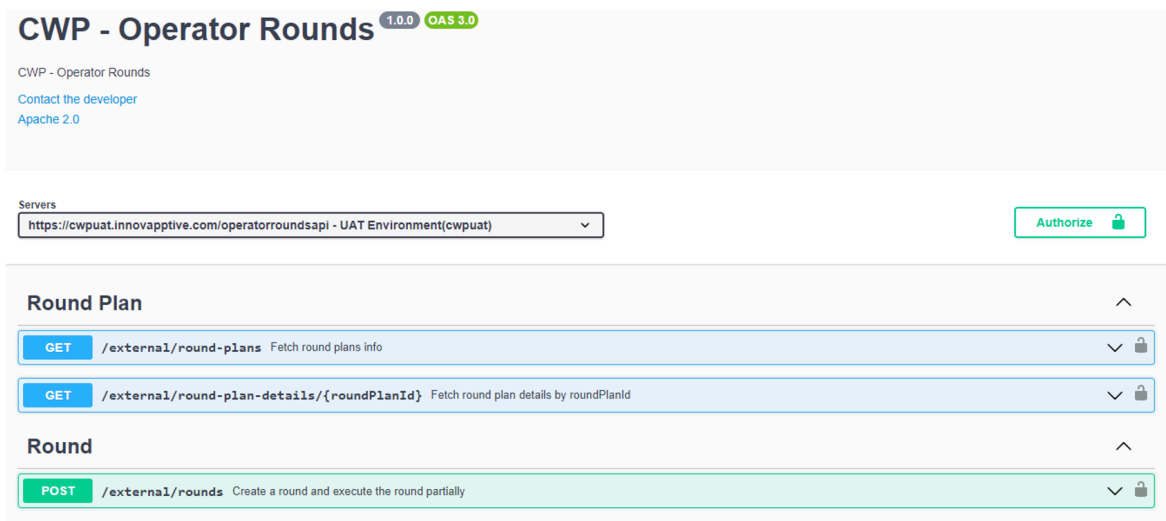
7. Click **Next** and **Publish**.

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

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



To programmatically generate and partially execute a round, see, [How to get Round Plans List \(on page 95\)](#), [How to get Round Plan Details \(on page 97\)](#), and [Dynamically Generate and Partially Execute a Round \(on page 93\)](#).



6.3.1. How to get Round Plans List

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

To get the round plans list:

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

The screenshot shows the 'Round Plan' API interface. At the top, there's a header 'Round Plan' with a close icon. Below it, a blue bar contains the method 'GET' and the endpoint '/external/round-plans'. A subtitle reads 'Fetch round plans info'. A note states: 'Fetch round plans info based on query parameters. In case of no query parameters are passed, by default it will fetch published round plans with limit 100'. The main section is titled 'Parameters' and contains a table with input fields for various query parameters. A 'Cancel' button is in the top right of this section. At the bottom, there is a large blue 'Execute' button.

Name	Description
tenantid * required (header)	tenantid
plantid (query)	plantid
formStatus (query)	formStatus
limit (query)	limit
searchTerm (query)	searchTerm
next (query)	next

3. Provide the following request parameters:

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

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

4. Click **Execute**.

The following response is displayed.

Server response

Code	Details
200	Response body <pre>{ "items": [{ "id": "addd59d8-84ae-4221-a2ed-51a4a60a25a0", "name": "Demo partial submission round", "description": "Demo partial submission round", "plantId": "0bd8a352-da2f-40fb-95c9-ea9d57f12154", "formStatus": "Published", "author": "Kiran Palani", "lastPublishedBy": "Kiran Palani", "createdAt": "2023-07-28T08:35:32.084Z", "updatedAt": "2023-07-28T12:29:40.112Z" }], "next": null }</pre>

6.3.2. How to get Round Plan Details

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

To get the specific round plan details:

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

GET /external/round-plan-details/{roundPlanId} Fetch round plan details by roundPlanId

Fetch round plan details based on roundPlanId path parameter (It returns location/asset wise round plan details)

Parameters

Name	Description
tenantid * required (header)	tenantid
roundPlanId * required (path)	roundPlanId

Execute

6. Provide the following request parameters:

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

7. Click **Execute**.

The following response is displayed.

```

Server response
Code    Details
200
Response body
{
  "type": "location",
  "id": "01",
  "name": "Clarification plant",
  "tasks": [
    {
      "id": "Q1",
      "name": "Target/Plan Name"
    },
    {
      "id": "Q2",
      "name": "Target / Plan Value"
    },
    {
      "id": "Q3",
      "name": "Target Actual"
    },
    {
      "id": "Q4",
      "name": "Chart of throughput history"
    },
    {
      "id": "Q5",
      "name": "Event date & time"
    },
    {
      "id": "Q6",
      "name": "Resolution range"
    }
  ]
}

```

6.3.3. How to create a Round and Partially execute It

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

To create and execute a round partially:

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

Round

POST /external/rounds Create a round and execute the round partially

Create a round and execute the round partially based on round plan detail request

Parameters Cancel

Name	Description
tenantid* required (header)	tenantid

Request body application/json

Round plan detail object

```
{
  "roundPlanId": "string",
  "assignedTo": "string",
  "tasks": [
    {
      "id": "string",
      "value": "string"
    }
  ]
}
```

Execute

6. Provide the following request parameters:

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

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

**Note:**

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

For example,

```
{
  "roundPlanId": "add59d8-84ae-4221-a2ed-51a4a60a25a0",
  "assignedTo": "abc@iinovapptive.com",
  "tasks": [
    {
      "id": "Q1",
      "value": "Tom Curran"
    },
    {
      "id": "Q2",
      "value": "209.09"
    },
    {
      "id": "Q3",
      "value": "2023-07-31T08:11:31.526Z"
    },
    {
      "id": "Q4",
      "value": "2023-07-31T08:11:31.526Z"
    },
    {
      "id": "Q5",
      "value": "2023-07-31T08:44:24.526Z;2023-07-30T08:44:24.526Z"
    },
    {
      "id": "Q6",
      "value":
        "Uk1GRv6kBABXRUIJQVLA4IPKkBACwgBwdASrKCNwFPkKkjkuIoIEqpdk6qVAJCwNuKQh/+988q1p8CnkK8Dx6prJ6z+sg2ln8P004y0n27gZJ77J/QsZ3/T1z/ZP9rzKua/2D/n/5Pyr/qP/H42vn/+5/7"
    }
  ]
}
```

| 6 - Invoke mRounds Tasks using APIs

```
vuFfy/+q/77/E/lB87P+L3pm3f7T/Af/a/8n/6f9T6W/J1/4/qhf4X1Hf9P0Jv1X/gfuD8Bn6zenj/b/c300/tn/I/bX3K/1P/N/+//U9rjwP
0p/fYKlxfZ/+X/Y/vB/p/eu5D71/mH4P/Rf9n/K/u19s/9r/8eKPt3/V/br1b0ov/N/nv9d+53ym/7H/x/3n+++M/8s/2f/
w/1/7//737Gf1u/7X+K/1Xwn/9H7kFC794PVz+4v7f/8f4TP/P+7///+T390/7X7m/9/5Pv6b/xf///1v/V8e/rW/+31af+/6K//q/eb/7/Mh
+5H7pf934Pf8//+v9r/wdcA+Sf9/zV/Nv7n9tfI38293j3o/z376/Ndnz7nP/X9s/Zj+h/q/
/D/nPZf9+X++9CfzT++9C/8u/rv/M/w3swTifEnL32X+av00P3/259zf1z/m+xp/U0Sp/pf
+f2JP9J/vvVf/3//36efsD9ufdK/xR0kMFe5lo2gs7bNwM97pbcWmJN/TtUi0b0hSm2m4Beb9ZNSnLhqQILsvgxpxX/kr6Eofiqgnej0N8qwh2w
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ifarRFqB3pk23svtTPZAU6CVvzLPmTqCxsLZiob1Pf5mDL55R0cb/p0Rjy7Gpt66wsJM60QdrMb6Tn/LvSKuNI6Uvbk0nadGZwUsIOLK1eR1f1
1S/f2bec0HMaullwEe10n84LPDVL7Q/9UYgVwEYPT1TgFDP+5qYrbKSh3A0Y1h7s6bdP22gmEQRXTE0grBJzVMeJ/
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```

```

8zr9MaiLYWcEsvkrVz9Ly5qUV6pbsT/al7zFSltw/CbvFbsKRT3PLXH/kat3mHYLaglvExfokp1SAB1PMPj3kwbWIRxcK4hqrBgaT3yIfByuns
dxYpbn71FKiQe6Wnnj5q9R/GNTUIf712T7og/yJuSNQEavXmT389vURVwGPaK5w9lLEBPitE1XEL1MXFY4iekE9Jw5lpX3Se2pk82pKx1sQWKm
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TX2uHVDezJzrCda1yJSff8/Q/oubjW2JXY2A96VeMTUNoUof/vwbKoio+TCPTberb0qU0KeVQE00VA1fiRZ40956VtR24VXC5vF+DdbBetdh2b1
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not/R5Rcx56+DX8tbYK2xs1Rh/0gCAoBeKLocVn9qtnj5Gat7rbI2uY8IsjAHQyK+fnftis0TfCfvMR1Z7+Pn8L16vmvmw6Tn9EZqeg9AQLSNTp
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+4G3i8Lnd8gt0QLUORLbd1Gm3eIMut/Q1RMvBvNyUn1BGihz+g5enCAQ0N36yF7wc2n1JgYL7CD+kaVyZtjy0hw18xh9pyv6aowymj0xnt0Vo2
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GI23sCZihIIWI0TihS5iwdC6HErr42T6/6JnwH6xDSwRr8DIS/9l4i2f30eXeCmS3mojFo13cLQTZEiuWbstbGD6SgGt9W/D3z4EoY5SXZbr2
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```

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3V/2PYkidcEFwsit9ccLUl18hfWk8J3EznLKet0zLVuVxER+kvP7FBo0vDCJoLqrZZUrKePqhNLIFW1dvoZS1EQH8cZgjNqrvdOnmDBIKKkhd5
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Note:

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

8. Click **Execute**.

The following response is displayed.

Code	Description
200	Responds with newly created round submission Media type application/json Controls Accept header. Example Value Schema <pre>{ "id": "string", "inspectionslistID": "string", "plantId": "string", "assignedTo": "string", "previouslyAssignedTo": "string", "createdBy": "string", "flatHierarchy": {}, "formData": {}, "isDeleted": "string", "createdAt": "2023-07-28T13:42:12.301Z", "updatedAt": "2023-07-28T13:42:12.301Z" }</pre>

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

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

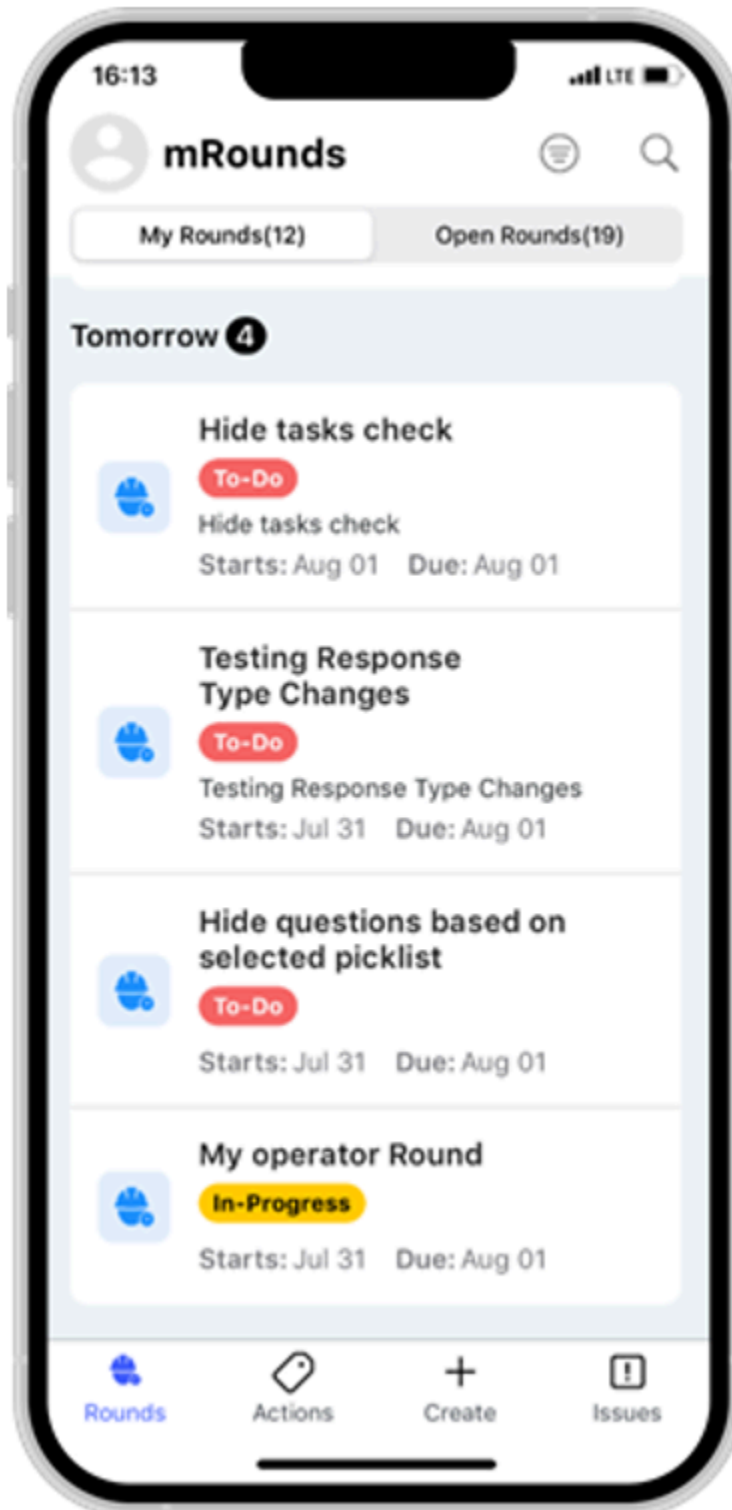
To view partially executed round details:

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



Note:

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



The screenshot displays the mRounds mobile application interface on a smartphone. At the top, the status bar shows the time 16:14 and LTE signal. The app's header bar includes a back arrow, the title "My operator Round", and a QR code icon. Below the header, a blue bar contains the text "POX P1,P2 Hyder..." with navigation arrows and a menu icon. A toggle switch for "Show Open Tasks Only" is visible. A progress bar indicates "3/5 Filled" with a green fill. A blue section header "Section" is followed by three input fields: "Text" (containing "Tom Curran"), "Number" (containing "209.09"), and "Date and Time" (containing "31 Jul 2023 16:13"). Each field has icons for "Photo", "Note", "Action", and "More". At the bottom, a "Save" button is present.

16:14

< My operator Round

< POX P1,P2 Hyder... > ...

Show Open Tasks Only

Page

3/5 Filled

Section

Text

Tom Curran

Photo Note Action More

Number

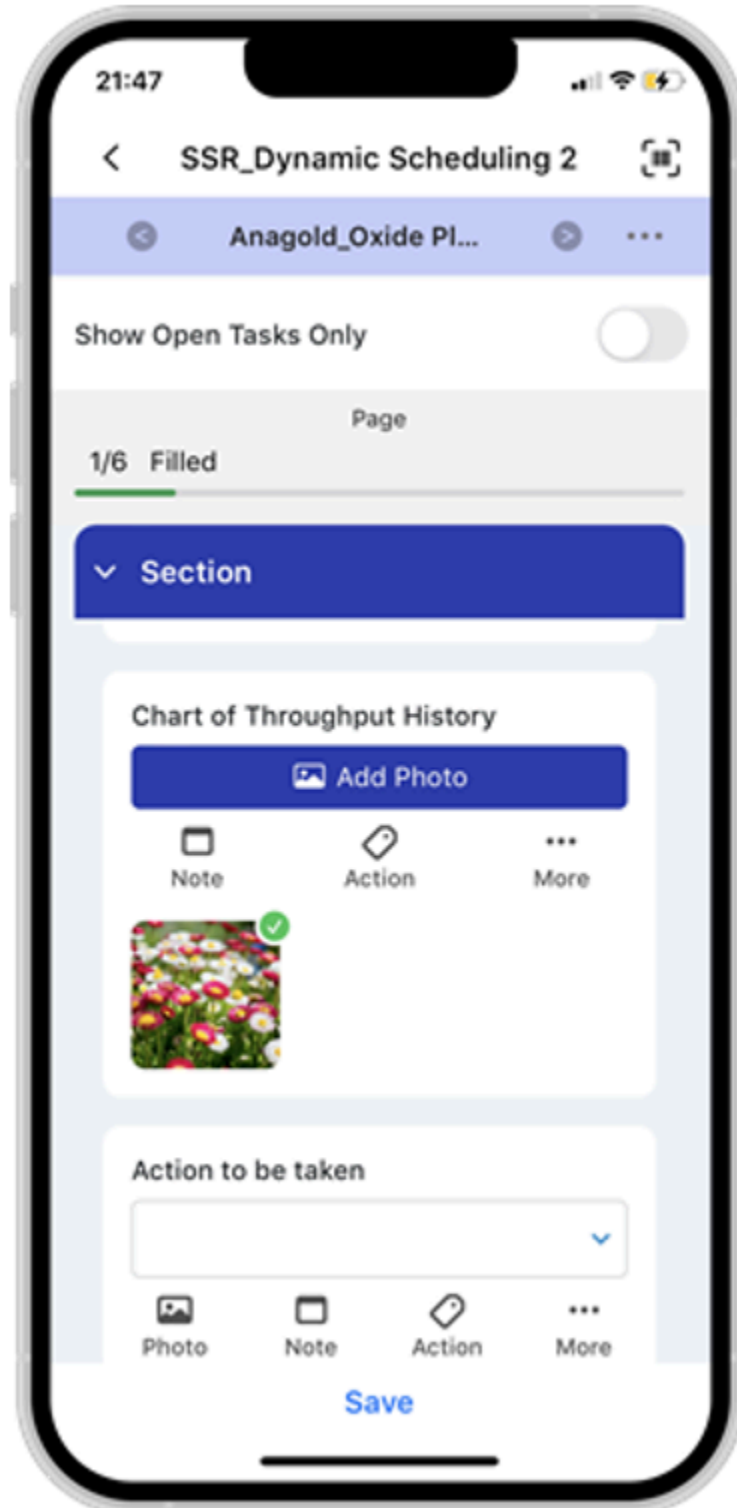
209.09

Photo Note Action More

Date and Time

31 Jul 2023 16:13

Save



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

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

6.4. Understanding Error Codes

Following are the possible error codes:

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