

# iMaintenance Configuration Guide

Connected Worker Solutions



# Title and Copyright

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

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Primary Author: Innovapptive Inc.

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# Preface

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

## Intended Audience

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

## Document Conventions

Table 0-1 Conventions followed in the document

| Convention             | Meaning                                                                                                                |
|------------------------|------------------------------------------------------------------------------------------------------------------------|
| <b>boldface</b>        | 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 |

## Related Products & Solutions

- [Work Order Management](#)
- [Inventory and Warehouse Management](#)
- [Analytics and Dashboards](#)

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# 1. Introduction

---

The **iMaintenance Configuration Guide** is your blueprint for shaping how iMaintenance works in your organization.

Once the product is deployed, this guide helps you transform the out-of-the-box system into a solution tailored to your business processes, plants, and teams.

Unlike installation or deployment activities that live with IT, the configurations in this guide are what bring iMaintenance to life for end users. From onboarding tenants and defining identity providers, to managing users and roles, setting up master data, and enabling core modules like Work Orders, Issues, and Timesheets — every section of this guide is designed to help you align iMaintenance with the way your organization runs maintenance.

With this guide, you will:

- **Establish the foundation** → onboard your tenant, configure authentication, and set up users and master data.
- **Control product behavior** → decide which modules are available, how Work Orders flow, and how AI, timers, and measuring points are applied.
- **Integrate and extend** → connect to ERP systems, define MCC behavior, and configure observation handling.
- **Customize and optimize** → design forms, create RACE templates, define risk matrices, set notifications, and personalize platform settings.
- **Drive insights** → configure dashboards and reports that turn operational data into decision-ready intelligence.

Whether you are an **administrator, functional lead, or supervisor**, this guide gives you the controls to tune iMaintenance so it mirrors your organization's rules, safety requirements, and productivity goals — without touching the underlying infrastructure.

## 1.1. About the Configuration Platform

---

The **iMaintenance Configuration Console** is the web admin layer that lets your organization shape how iMaintenance behaves—without code.

From one place, functional admins define modules, map forms, enforce validations, and set product-wide defaults so technicians and supervisors get a clean, consistent experience in the field.

**What you can do here:**

- **Manage Core Modules:** Enable/disable Issues, Work Orders, and Timesheets at tenant or plant level.
- **Control Work Order Behavior:** Auto timers, raise issue at submission, follow-up issues, operation confirmation, RCA, measuring points.
- **Design Data Capture:** Build forms/templates, add conditional logic, field rules, and validations.

- **Assign by Hierarchy:** Map forms and settings to plants, locations, units, or teams.
- **Set Global Defaults:** Session timeout, chat, attachments/DMS, list templates, key mappings.
- **Administer Access:** Create users and groups, assign roles/permissions, enforce governance.
- **Connect Systems (UI side):** Configure ERP connections and other integrations exposed in the console.
- **Publish Insights:** Configure dashboards and reports used across the org.

Who should use this

- **Functional Administrators / Doc Owners** — primary audience. They own templates, module controls, business rules, and access policies.
- **IT / Basis (as-needed support)** — assists when a configuration requires backend application (e.g., DB-stored flags), SSO/IDP wiring, or transport/security steps documented in the **Deployment & Setup Guide**.

"

If you execute work (create/complete WOs, inspections, timesheets), see the **User Guides**. If you shape how iMaintenance works, you're in the right place.

"

## 1.2. What's New for Configuration

Review the iMaintenance features introduced in release 2608 iMaintenance configuration release.

### New Features and Enhancements in Release 2608

Table 1-1 New Features and Enhancements in Release 2608

**Simpler Navigation and Access**

Clearer module names, maintenance capabilities grouped together, and all dashboards in one place.

For more information, see [Explore the Home Screen \(on page 11\)](#).

**Manage Users and Permissions More Efficiently**

User Management now has a dedicated tab per product, with modules organized by Product, Module, and Sub-module — so you can manage all web and mobile roles and permissions for a product in one place.

For more information, see [Create Roles and Permissions \(on page 34\)](#).



## 2. Log in to Application

---

This chapter has the following topics:

- [Log in to Platform Application \(on page 9\)](#)
- [Troubleshoot Login Issues \(on page 10\)](#)

### 2.1. Log in to Platform Application

---

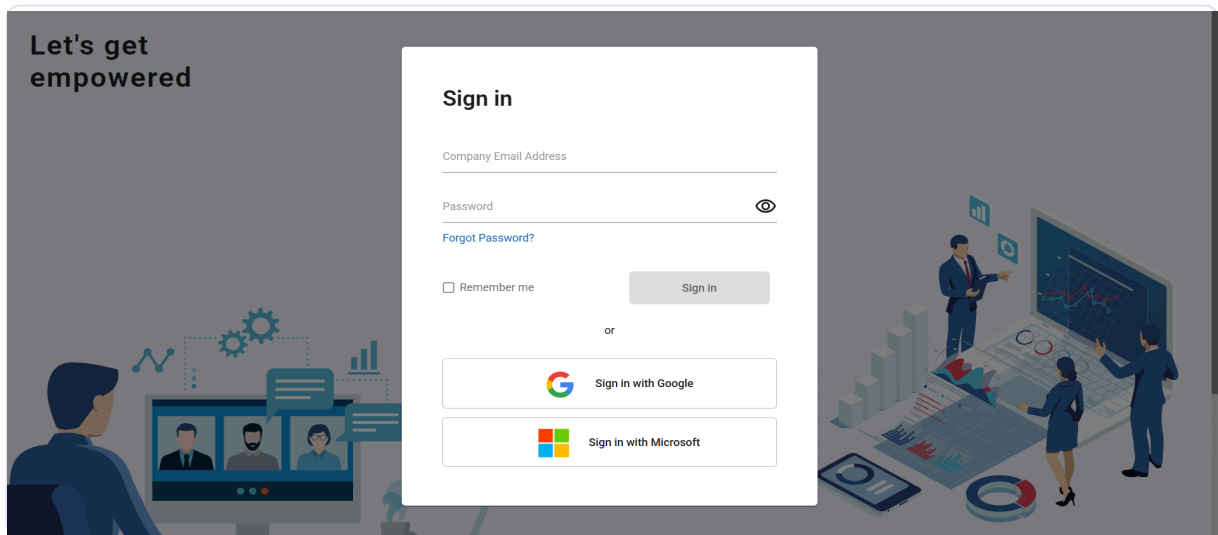
You can access the platform using multiple login methods based on your organization's configuration.

#### Basic Authentication

---

Use your company registered email and password to log in.

1. Open the application.
2. Enter your **Email Address** and **Password**.
3. Click **Sign in**.
4. Select **Remember me** to save login credentials. (Optional)



#### Single Sign-On (SSO: Google or Microsoft)

---

You can also sign in using your **Google** or **Microsoft** account—whichever is enabled for your organization.

1. On the login screen, click **Sign in with Google** or **Sign in with Microsoft**.
2. Select or enter your account credentials.

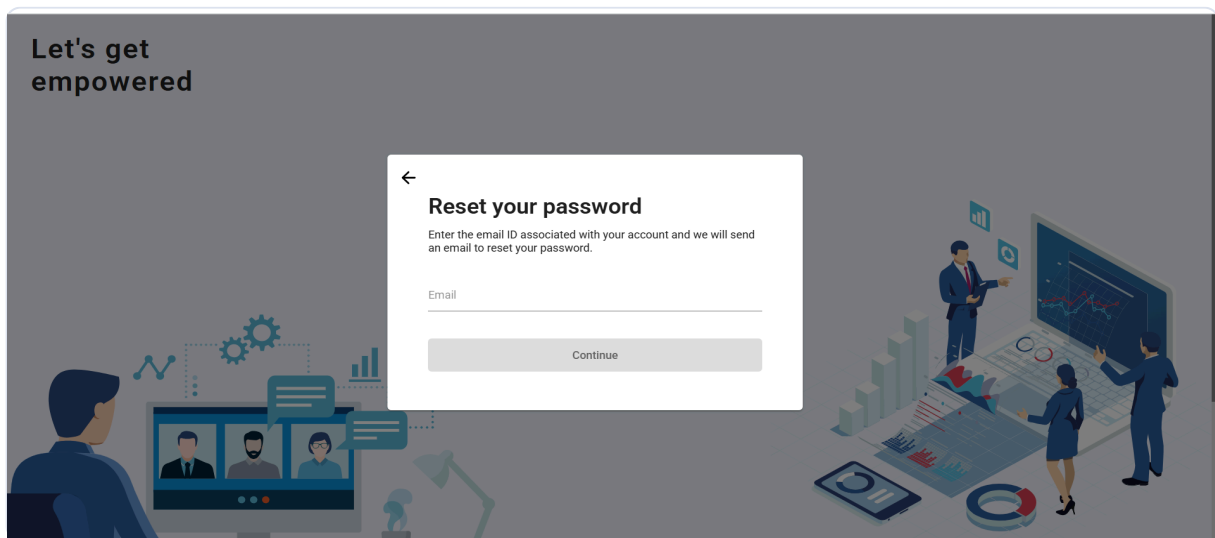
**Note:**

If this is your first time, the same button completes your sign-up process. If your browser has saved Google or Microsoft accounts, they will appear automatically for quicker selection.

## 2.2. Troubleshoot Login Issues

If you forget your password:

1. Navigate to the **Sign in** page.
2. Click **Forgot Password?**
3. Enter your registered email and click **Continue**.



4. If two-factor authentication is enabled, verify using the code sent to your phone.
5. Follow the email link to set a new password.

## 3. Navigate to the iMaintenance Configuration

This section helps you get familiar with the layout of the platform and how to access various modules efficiently.

This chapter has the following topics:

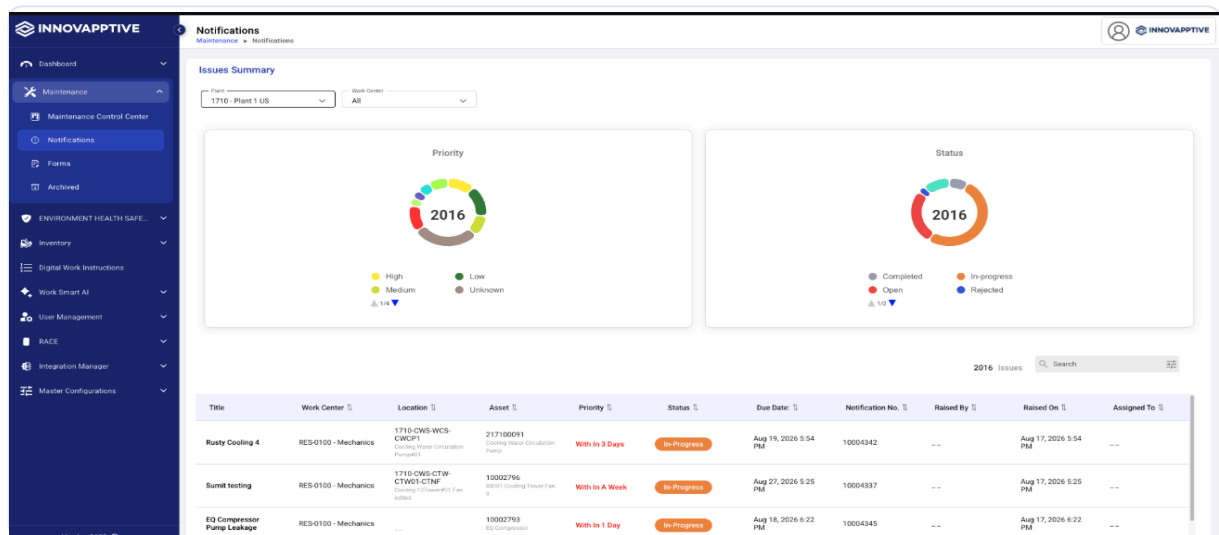
- [Explore the Home Screen \(on page 11\)](#)
- [Access Modules \(on page 11\)](#)
- [Understanding the Platform Layout \(on page 12\)](#)

### 3.1. Explore the Home Screen

This section helps you get familiar with the layout of the platform and how to access various modules efficiently.

After logging in, you are directed to the Home Screen, which acts as the central hub for all platform activity. From here, you can:

- Track specific plants and assets' performance.
- View key widgets and summaries.
- Access dashboards and reports.
- Use the left-hand navigation panel for quick access to modules such as Maintenance, Notifications, and more.



The layout is designed for **ease of use**, with consistent elements across modules for a smoother user experience.

### 3.2. Access Modules

Modules represent different functional areas of the platform (e.g., MCC, Observations, Forms, RACE, Settings).

To access a module:

1. Use the **left navigation pane** to browse through available modules.
2. Click a module name (e.g., **Maintenance Control Center**) to open it.
3. Sub-menus, if any, will expand below the selected module.

Some modules may only appear based on your **role and access permissions**.

*Tip:* Hover over icons in the side panel to view full module names if the menu is collapsed.

### 3.3. Understand the Platform Layout

The platform interface is made up of the following key areas:

| Area                                          | Description                                                                                       |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------|
| <b>Header Bar</b>                             | Located at the top, it includes user profile options, notifications, and product/version details. |
| <b>Navigation Panel (Left Sidebar)</b>        | Lets you access different modules, features, and configuration options.                           |
| <b>Main Workspace</b>                         | The center of the screen where dashboards, forms, reports, and module content are displayed.      |
| <b>Filters and Actions (Top of Workspace)</b> | Contextual filters, search bars, and action buttons are available based on the module in use.     |

The interface is consistent across modules to make navigation intuitive and user-friendly.

## 4. Customer Tenant Onboarding with Azure IDP

---

This chapter provides step-by-step instructions to configure a customer's Azure Active Directory (Azure AD) for federated Single Sign-On (SSO) with Innovapptive mobile applications. It applies to IT administrators and implementation engineers performing customer onboarding.

Follow the below steps to register tenant specific CWP enterprise application in the Azure portal:

1. Access the Azure portal using the following URL <https://portal.azure.com/> and, use required tenant credentials to login into the Azure portal.
2. Post login, click the **View** button.
3. Click the **App registrations** on the left-side menu.
4. Click the **New Registration** button and provide the required information to register tenant specific CWP enterprise application.
  - a. Name (Name of the CWP enterprise application).
  - b. Supported account types (It is self-explanatory. Select it based on the client's requirement. For now, go with a single tenant).
  - c. Redirect URI (Mention here the Tenant Specific URL that the user must be redirected to post successful login with Azure IDP).
  - d. Click the **Register** button.
  - e. For mRounds 1.0 product the redirect URI should be added as a Single page application.
  - f. For iMaintenance Product the redirect URI should be added as Web based application.



### Note:

- The CWP application URL follows the format: <customername><tenanttype>.innovapptive.com. For example, if the customer name is Google, the URLs will be:
  - Dev: googledev.innovapptive.com
  - QA: googleqa.innovapptive.com
  - Prod: google.innovapptive.com
- Both QA and Prod environments share the same domain format.

5. Click the **Authentication** on the left-side menu to select the token authorization endpoint flow.
6. Select **Access tokens** checkbox and click the **Save** button.

## 7. Click the **API Permissions** from the left-side menu.

- Click the **Add a permission** button. You must see Request API Permissions on the right side.
- Click the **Microsoft Graph**.
- Click the **Delegated permissions**.
- Search and select email, offline\_access, openid, chat, apple maps, and profile permissions one by one.
- Click the Add permissions button.
- Click the **Grant admin consent** button.
- Select Microsoft APIs and click on Microsoft Graph (Refer Below)
- Add 7 user delegation permissions and 1 application permission (Refer below)  
Optional: sharepoint permissions need to be added if we want to integrate sharepoint.



### Note:

In Azure App Registrations, there are two types of API permissions: **Delegated** and **Application**. **Delegated permissions** are used when an app acts on behalf of a signed-in user, meaning the app's access is limited to the user's permissions and requires user login. These are ideal for interactive apps like web or mobile applications. **Application permissions**, on the other hand, allow the app to run independently of a user and access APIs with its own identity, typically used by background services or daemons. Application permissions usually require admin consent and provide broader access at the tenant level.

| Claim Value            | Permission                                          | Type        | Permission Status |
|------------------------|-----------------------------------------------------|-------------|-------------------|
| offline_access         | Maintain access to data you have given it access to | Delegated   | Default           |
| AccessReview.Read-.All | Read all access reviews                             | Application | Default           |
| Files.Read.All         | Read all files that user can access                 | Delegated   | Sharepoint        |
| User.Read.All          | Read all users' full profiles                       | Delegated   | Default           |
| Files.Read.All         | Read files in all site collections                  | Application | Sharepoint        |
| Sites.Read.All         | Read items in all site collections                  | Delegated   | Sharepoint        |
| Sites.Read.All         | Read items in all site collections                  | Application | Sharepoint        |
| Files.Read             | Read user files                                     | Delegated   | Sharepoint        |
| User.Read              | Sign in and read user profile                       | Delegated   | Default           |
| openid                 | Sign users in                                       | Delegated   | Default           |
| profile                | View users' basic profile                           | Delegated   | Default           |
| email                  | View users' email address                           | Delegated   | Default           |

8. The following steps are useful in SAP OData endpoint authentication using SSO (SAML 2.0 Bearer Assertion Flow for OAuth 2.0).
- Click the **Certificates and secrets** from the side menu. You must see the Certificates and secrets screen.
  - In the **Client secrets** tab, click the **New client secret** button. Provide description, expiration days and then click the **Add** button.
  - Copy the generated secret value using the **Copy** icon and save it in a text file, to use at the time of tenant onboarding from the CWP web application. In case of secret expiration, follow the above step to generate a new secret and update in tenant onboarding.
  - Click **Expose an API** from the side menu and then click the **Add a scope** button. You'll be asked to set the Application ID URI for the enterprise application registration. Accept the proposed default value by clicking the **Save and continue** button.
  - Provide the required details and click the **Add scope** button.
  - Copy the created scope by using the Copy icon and save it in a text file (or) Come back to Expose an API side menu for scope (View => App registrations => Application Name => Expose an API), to use at the time of tenant onboarding.
9. Click **Overview** from the side menu. Copy the Application (client) ID, Directory (tenant) ID and Application ID URI of the newly registered CWP enterprise application and save it in a text file (or) Come back to Overview side menu for client, tenant ids and application id URI (View => App registrations => Application Name), to use at the time of tenant onboarding.
10. If the user is not added into AAD Enterprise applications please follow the below steps to add the user into a particular application.
- Go to the e-application and look for the application that you created.
  - Open the application and select users / groups and add the user if he is not added already to the application.

**Note:**

If the user is already added to the application, **don't follow the 9th step.**

**Table 4-1 From CWPEnterpriseApp**

|                    |                                          |
|--------------------|------------------------------------------|
| Tenant ID          | f8e6xxx-xxxx-xxxx-xxx-bxxxxxx            |
| Client ID          | 50xxxxxxx-xxxxxx2ad-xxxxxx               |
| Application ID URI | api://50bfxxxxxxx-42ad-xxxxxx            |
| Client secret      | hyxxQ~wXXXXXXac0bntd4xxxxxx              |
| Scope              | api://50xxxxxxx-42ad-xxxxxx/netweavexxxx |

**Note:**

Above is the base format of the Azure Enterprise app details.

## 5. Okta Single Page Application Configuration

---

This section explains how to configure a Single Page Application (SPA) with Okta for authentication and authorization. It covers the required settings in the Okta Admin Console along with key considerations for integrating Okta with the SPA.

### Prerequisites

Before starting the configuration, ensure the following:

- An active Okta Organization with administrator privileges
- Basic understanding of OpenID Connect (OIDC) concepts

### 5.1. Okta Configuration for Innovapptive CBO (Web)

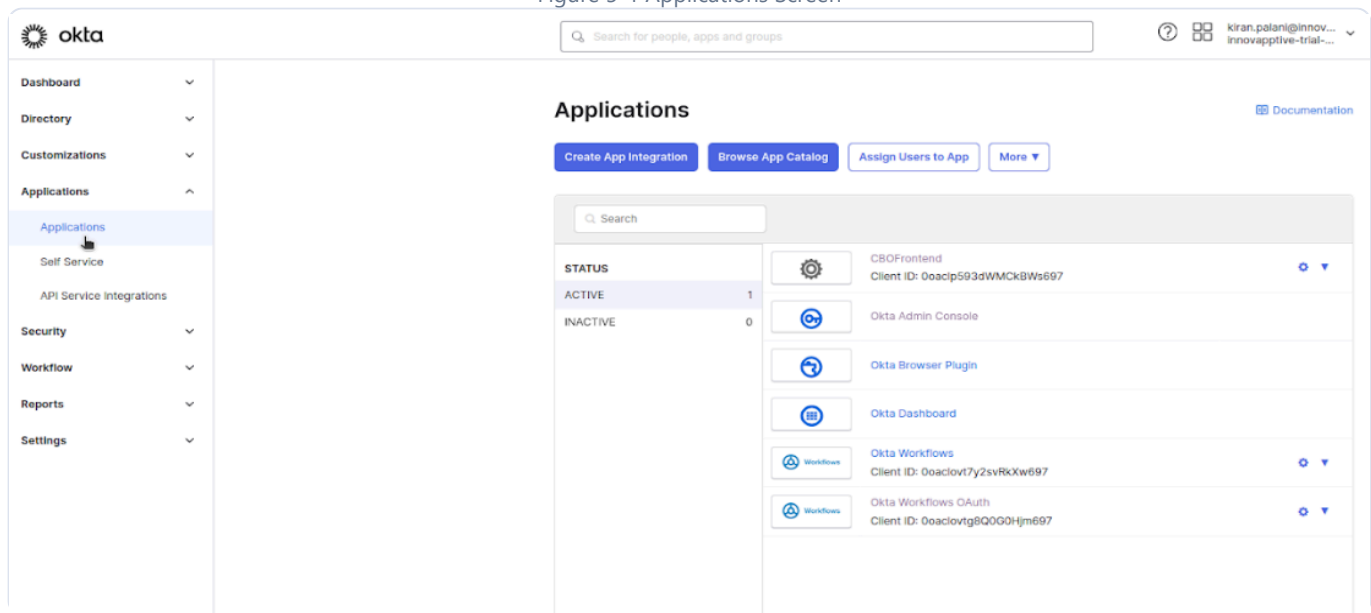
---

To configure Okta for CBO web application:



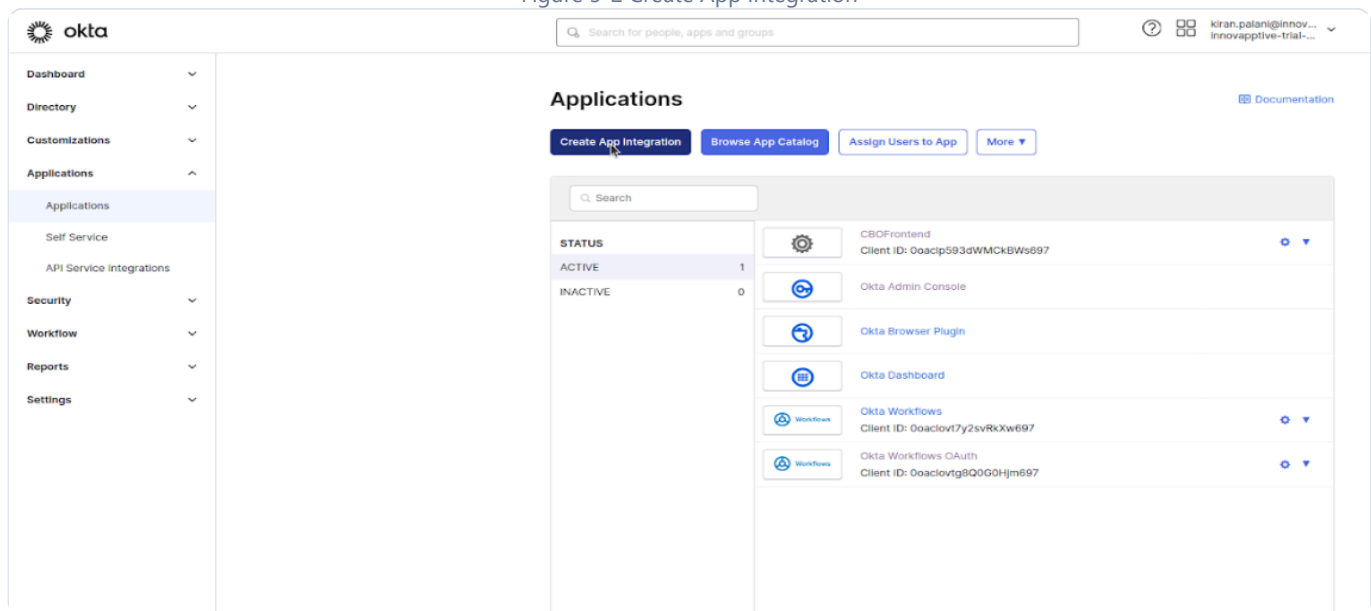
1. Log in to your Okta organization as an administrator.
2. Expand **Applications** on the left-side pane and select **Applications**.

Figure 5-1 Applications Screen

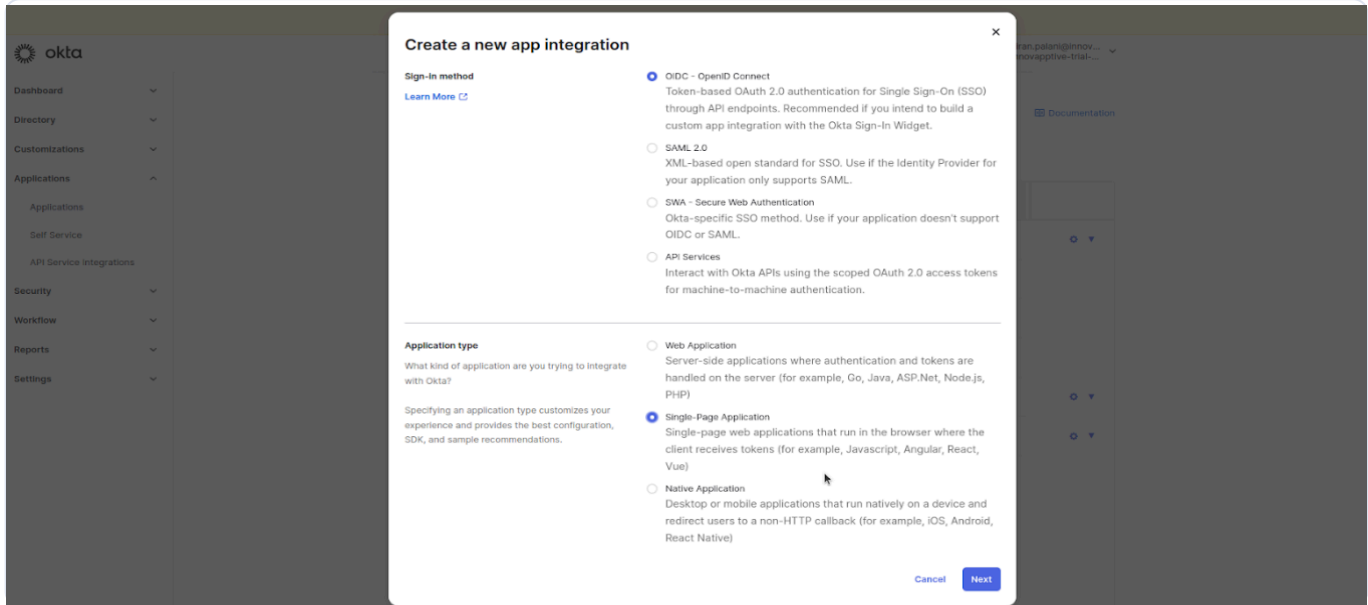


3. Click **Create App Integration**.

Figure 5-2 Create App Integration



4. Select **OIDC - OpenID Connect** as the sign-in method.
5. Choose **Single-Page Application** for the **Application Type**.

6. Click **Next**.7. Add name **Innovapptive CBO <Environment>** in the **App integration name** field.

(Environment – DEV/QA/PRD)

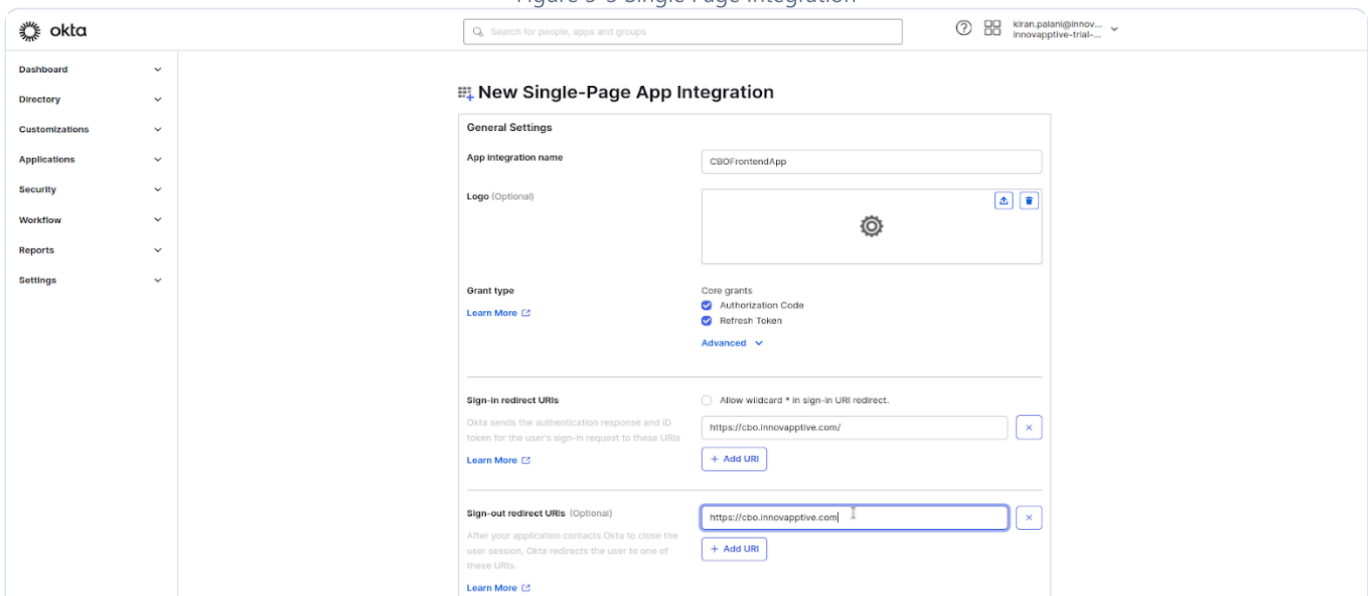
8. In the **Grant Types** section, select the following options:

- **Authorization Code** (default)
- **Refresh Token** (enable to allow for silent authentication)

## 9. Update Sign In and Sign Out URI's with tenant specific URI's.

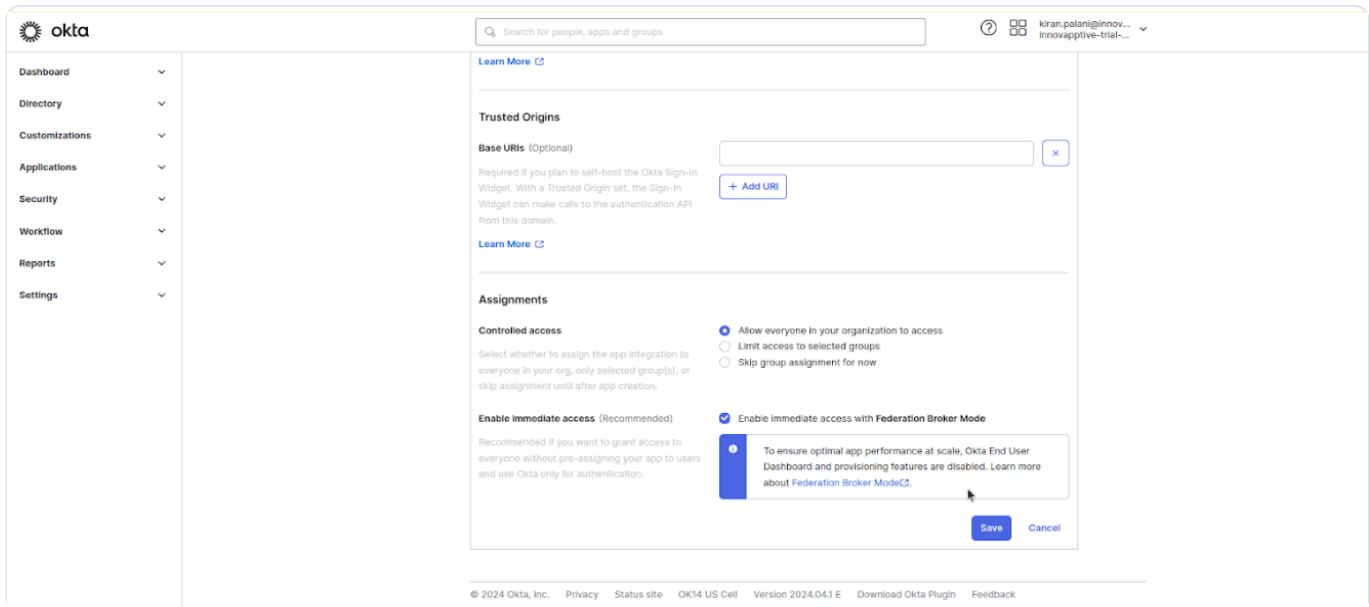
(Innovapptive will provide the URL details)

Figure 5-3 Single Page Integration



10. Select the Assignments (controlled access) based on the tenant requirements.

11. Click **Save**.



Okta

Search for people, apps and groups

Learn More

**Trusted Origins**

**Base URIs (Optional)**

Required if you plan to self-host the Okta Sign-In Widget. With a Trusted Origin set, the Sign-In Widget can make calls to the authentication API from this domain.

+ Add URI

**Assignments**

**Controlled access**

Select whether to assign the app integration to everyone in your org, only selected group(s), or skip assignment until after app creation.

☒ Allow everyone in your organization to access

☐ Limit access to selected groups

☐ Skip group assignment for now

**Enable immediate access (Recommended)**

Recommended if you want to grant access to everyone without pre-assigning your app to users and use Okta only for authentication.

☒ Enable immediate access with **Federation Broker Mode**

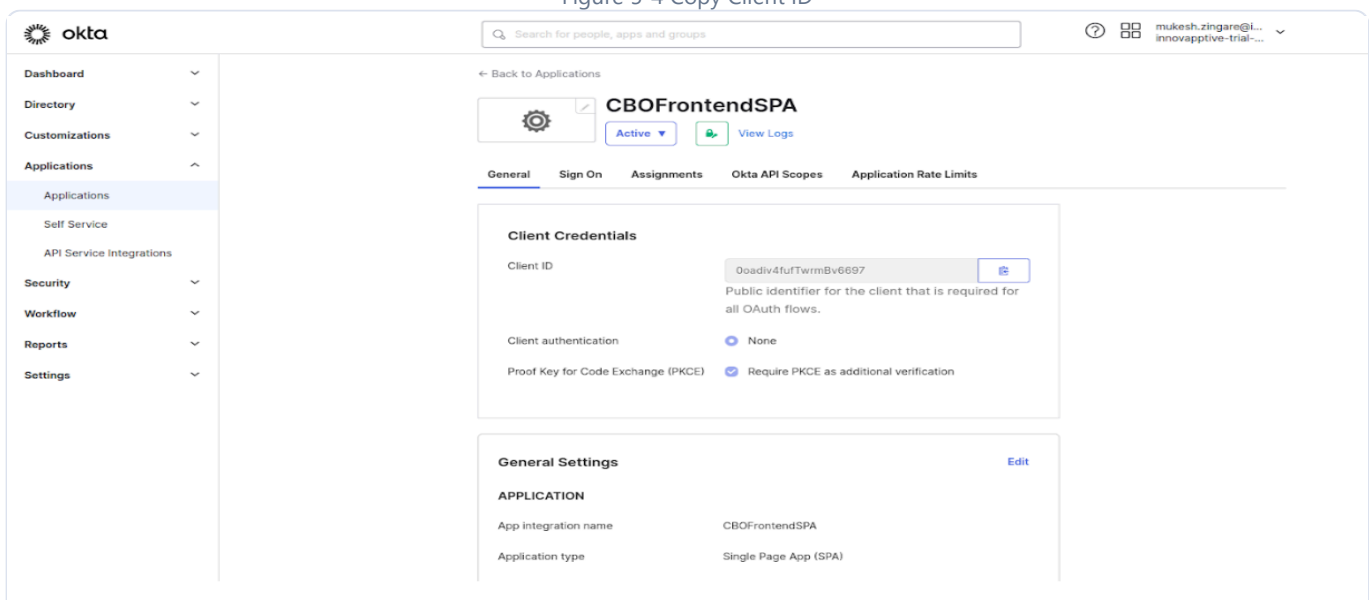
To ensure optimal app performance at scale, Okta End User Dashboard and provisioning features are disabled. [Learn more about Federation Broker Mode](#).

Save Cancel

© 2024 Okta, Inc. Privacy Status site OKT4 US Cell Version 2024.04.1 E Download Okta Plugin Feedback

12. Copy and share the **Client ID** for tenant onboarding.

Figure 5-4 Copy Client ID



Okta

Search for people, apps and groups

← Back to Applications

**CBOFrontendSPA**

Active View Logs

**General** Sign On Assignments Okta API Scopes Application Rate Limits

**Client Credentials**

Client ID: 0oadiv4fufTwrmBv6697

Public identifier for the client that is required for all OAuth flows.

Client authentication: ☒ None

Proof Key for Code Exchange (PKCE): ☒ Require PKCE as additional verification

**General Settings** Edit

**APPLICATION**

App integration name: CBOFrontendSPA

Application type: Single Page App (SPA)

## 5.2. Okta Configuration for Innovapptive CBO (Mobile)

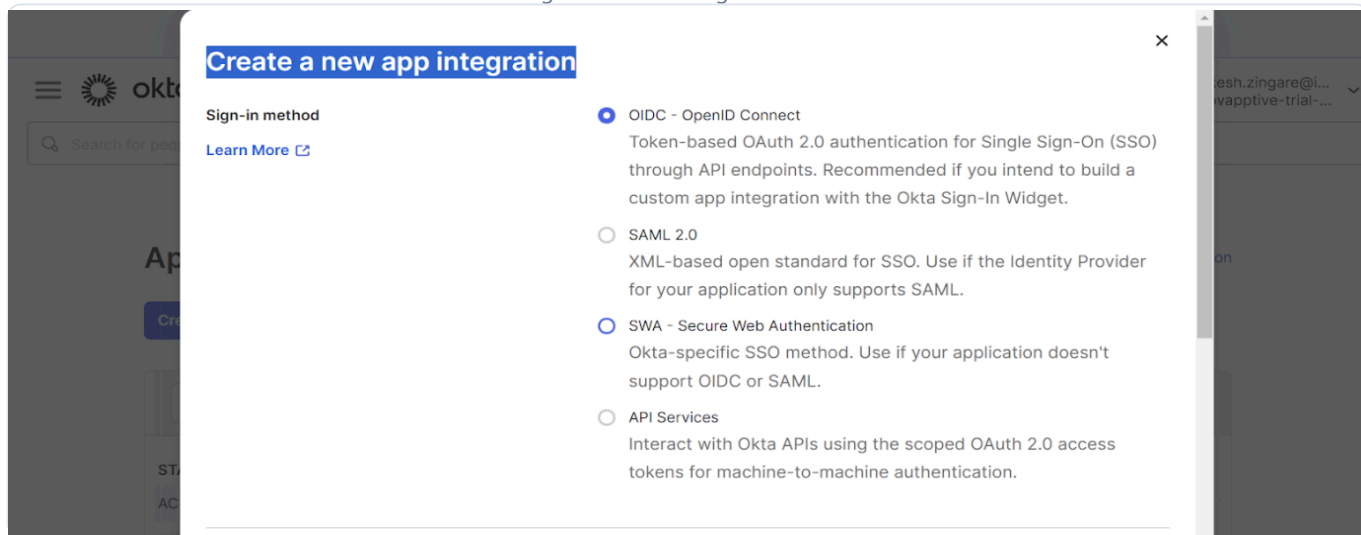
To configure Okta for mobile application:

1. Log in to your Okta organization as an administrator.
2. Click on the hamburger menu and select **Application**.
3. Click the **Create App Integration** button.

4. In the **Create a new app integration** window:

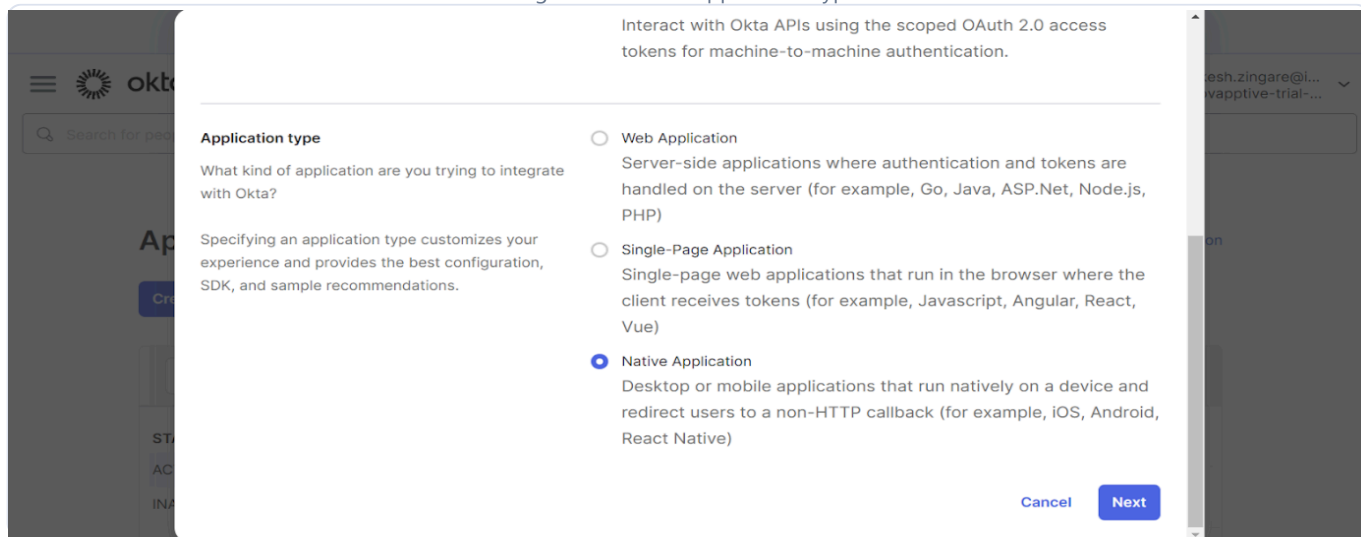
a. Select **Sign-in Method = OIDC - OpenID Connect**.

Figure 5-5 Select Sign In Method



b. Select **Application Type = Native Application**.

Figure 5-6 Select Application Type



c. Click **Next**.

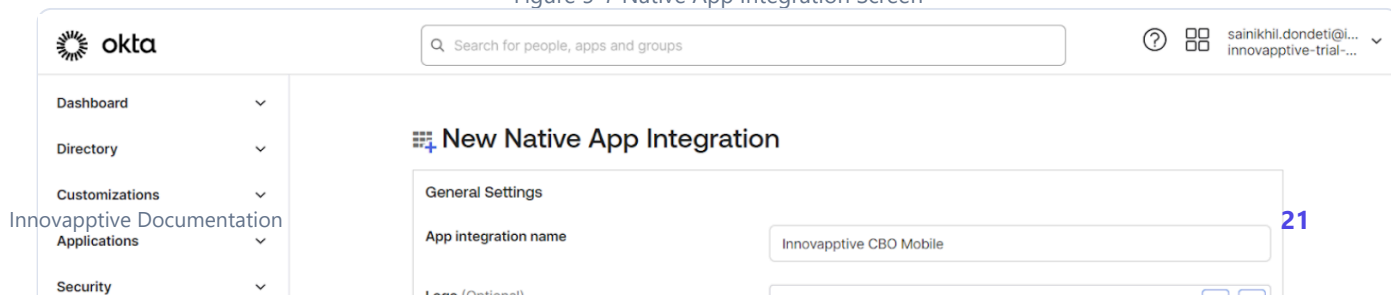
d. Add name "**Innovapptive CBO Mobile <Environment>**" in **App integration name** input.

(Environment – DEV/QA/PRD)

e. Select **Grant type**,

- Authorization Code
- Refresh Token

Figure 5-7 Native App Integration Screen



## 5.3. Tenant Onboarding Details and Field Mapping

This section outlines the information required for tenant onboarding and how Okta configuration fields map to Innovapptive CBO tenant fields.

### Details Required for Tenant Onboarding

The following details must be provided to Innovapptive to complete tenant onboarding:

|                      |                                                            |
|----------------------|------------------------------------------------------------|
| <b>Client ID</b>     | 0oaxxxxxxxxxxxxx97                                         |
| <b>Audience</b>      | api://node.access                                          |
| <b>Issuer URI</b>    | https://xxx-xxxxx.okta.com/oauth2/auxxxxxxxxxxxxx          |
| <b>Tenant ID</b>     | XXXXXXX                                                    |
| <b>Client secret</b> | xxx_exxxT-xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx-x |

### Tenant Onboarding Field Mapping

The table below shows the mapping between Okta configuration fields and Innovapptive CBO tenant fields:

| Okta Configuration Field | CBO Tenant Field              |
|--------------------------|-------------------------------|
| Tenant ID                | Tenant ID                     |
| Client ID                | Client ID                     |
| Issuer URI               | Authority URL                 |
| Audience                 | Audience (Protected Resource) |

## 6. Authentication Identity Configuration

This chapter explains how Innovapptive's mobile applications (such as mWorkOrder, mRounds, and mTag) handle user authentication in a multi-tenant deployment environment. The authentication framework is based on federated Single Sign-On (SSO) and secure token-based session management.

It covers how users authenticate using enterprise-managed identity providers (such as Azure AD, Google, or Okta), how access and refresh tokens are managed, and how user data is synchronized with backend systems. This information is relevant for developers, implementers, and security teams configuring the authentication layer in customer deployments.

### Component Overview

The authentication flow involves multiple systems working together to validate user identity, issue secure tokens, and enable access to backend services. The table below summarizes the core components involved:

| Component            | Description                                                                                                                        |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Innovapptive DB      | Stores tenant-specific configuration such as Tenant ID, SSO method (e.g., Azure, Google), Client ID, and Client Secret.            |
| Tenant ID            | A unique identifier assigned to each customer environment.                                                                         |
| SSO Method           | Specifies the identity provider (e.g., Cognito, Azure AD, Google, Okta) used for user authentication.                              |
| Client ID & Secret   | Credentials associated with the Innovapptive application registered in the tenant's SSO provider.                                  |
| Mobile App           | The application being used — such as mWorkOrder, mRounds, or mTag — initiates the authentication request.                          |
| Auth Server          | Innovapptive's authentication microservice, deployed in the tenant's cloud, is responsible for token issuance and user validation. |
| Users Table          | Managed by the Auth Server. Stores user records, including internal User ID, SSO identifier, and SSO-issued refresh tokens.        |
| SSO Server           | The tenant-managed identity provider is responsible for authenticating users and issuing authorization codes and refresh tokens.   |
| Mongo User Directory | MongoDB Realm directory is used to authorize users for offline data sync and database access.                                      |

## 6.1. Federated SSO Login Flow

---

Innovapptive's mobile apps authenticate users using federated SSO, integrating with tenant-managed identity providers like Azure AD, Google, or Okta.

The following flow explains the complete authentication sequence—from mobile app launch to user provisioning—highlighting how the app, backend services, SSO server, and user management databases interact at each step.

1. The mobile app fetches the SSO method and Client ID for the tenant from the Innovapptive DB.
2. Based on the SSO type, the app displays a single sign-in button, such as Sign in with Google or Sign in with Okta.
3. When the user taps the button, an in-app browser opens and redirects them to the SSO login or consent screen.
4. Upon successful authentication, the SSO server redirects the user to Innovapptive's landing URL with a one-time authorization code.
5. The app sends this code—along with the tenant ID—to the Auth Backend.
6. The backend sends a grant request to the SSO server using:
  - Authorization code
  - Client ID
  - Client Secret
7. The SSO server responds with an access token and a refresh token.



8. Using the access token, the Auth Backend fetches the user's profile details from the SSO server.
9. The backend then:
  - Stores the user details and SSO refresh token in the Users Table
  - Creates a Mongo Realm user with a unique password
10. The backend returns the following credentials to the mobile app:
  - Realm username and password
  - Basic Auth JWT token (used for secure API and DB sync)

Figure 6-1 Federated SSO Login Flow – From Mobile App to SSO and Backend Sync

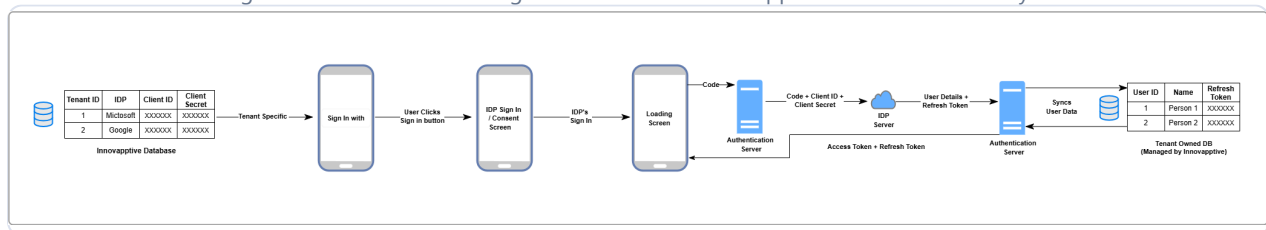
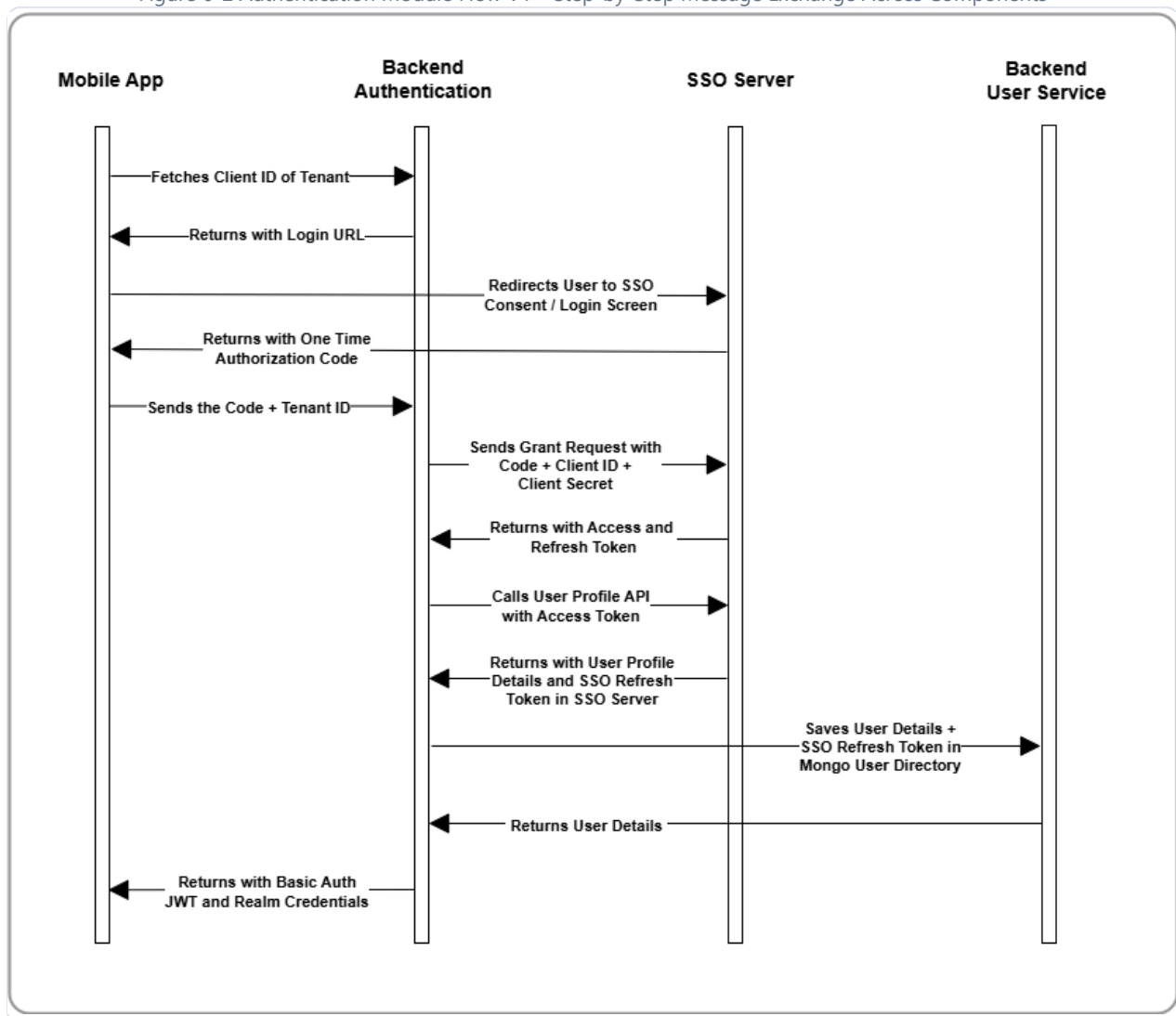


Figure 6-2 Authentication Module Flow V1 – Step-by-Step Message Exchange Across Components



Reference: [https://excalidraw.com/#json=Uc84zoidzuFrFQB\\_0mr-5,UHk6cX3C\\_yJpW-dDgC4nPw](https://excalidraw.com/#json=Uc84zoidzuFrFQB_0mr-5,UHk6cX3C_yJpW-dDgC4nPw)

## 6.2. Token-Based App API Flow

---

After the user is authenticated via SSO, the mobile app uses access and refresh tokens issued by the Auth Server to interact securely with backend services. This section explains how these tokens are generated, validated, and refreshed across service calls.

This flow assumes that the mobile app interacts with one or more backend services behind a common authentication layer.

### What Happens at Login

1. Once the user logs in, the Auth Server generates both an access token and a refresh token, which are stored in the Users Table and also sent to the mobile app.
2. Both tokens are formatted as JWTs (JSON Web Tokens).
3. The access token is short-lived (default: 15 minutes, configurable).
4. The refresh token has a longer lifespan (default: 30 days, configurable).
5. Tokens are signed using asymmetric encryption:
  - The Auth Server holds the Private Key used to sign tokens.
  - All other backend services use the Public Key to verify access tokens.

## 6.3. Use the Token After Login

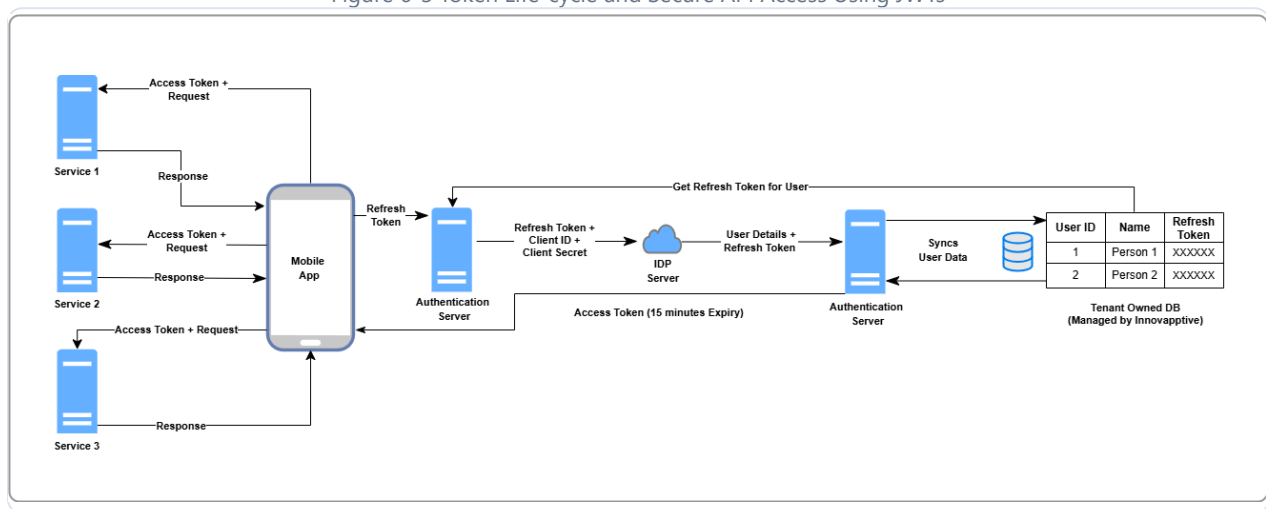
---

1. Every backend service is protected by a common middleware that validates the incoming access token using the Public Key.
2. For user-related data:
  - Services may perform read-only access to the Users Table directly for performance.
  - Alternatively, they can proxy the request via the Auth Server if direct access is restricted or decoupled.
3. If the access token has expired (after 15 minutes), the API call will fail with an authentication error.
4. When this happens, the app uses the refresh token to request a new access token from the Auth Server.

## 6.4. Refresh Token Handling

1. During the refresh call, the app also submits the SSO-issued refresh token to the Auth Server.
2. The Auth Server verifies the user's presence and active status in the tenant's SSO system.
3. If valid, it issues a new access token back to the app.
4. If the user no longer exists in the SSO system or is marked inactive:
  - The Auth Server deletes the corresponding user entry from the Users Table.
  - The app is instructed to log the user out immediately.

Figure 6-3 Token Life-cycle and Secure API Access Using JWTs



## 6.5. Alternatives for Users Table Synchronization

If the Users Table cannot always be reliably synchronized with the tenant's SSO server, alternative mechanisms may be considered to maintain alignment between user records and identity provider data.

There are two commonly adopted patterns for maintaining sync between the SSO system and the Users Table:

### Scheduled Sync Pipeline

Establish a synchronization pipeline that pulls user data from the SSO server and updates the Users Table.

- This can be either a manual process (e.g., initiated by admin tools) or an automated one.
- For automated sync, the cadence (hourly, daily, etc.) must be defined based on acceptable staleness and load tolerance.
- This method is relatively straightforward but introduces a time gap between SSO changes and backend updates.

### Event-Driven Pub/Sub Model

Adopt a publish/subscribe architecture, where the SSO server emits events (e.g., user created, updated, deactivated) to an exposed API endpoint on Innovapptive's side.

- These events are then used to update or delete user entries in the Users Table in near real-time.
- This approach ensures better consistency and reacts instantly to user state changes.
- However, it depends heavily on:
  - The SSO provider's eventing capabilities
  - Proper initial sync to align existing records

Reference: [JSON Web Tokens with Public Key Signatures – Miguel Grinberg](#)

# 7. Manage Users & Roles

---

The **User Management** module allows administrators to onboard users, define roles, manage access levels, and organize users into groups. It ensures users only see and interact with modules relevant to their responsibilities.

This chapter has the following topics:

- [Add and Modify Users \(on page 29\)](#)
- [Create Roles and Permissions \(on page 34\)](#)
- [Manage User Groups \(on page 32\)](#)

## 7.1. Add and Modify Users

---

Administrators can create users manually or in bulk, assign them roles, link them to plants, and control their access period.

To create a user manually:

1. Navigate to **User Management > Active Users**.

2. Click **Add User > Create Manually**.

3. In the **Add User** window, fill in the following fields:

- First/Last Name, Title, Email
- Role, Validity Dates
- Plant, Planning Plant, Maintenance Plant
- Work Center, Reporting To, Reportees
- User Group, Data Entry Profile, Shift

Figure 7-2 Add User

The screenshot shows the 'Add User' window with the following fields and values:

- First Name \***: Tony
- Last Name \***: Mark
- Title \***: Supervisor
- Email \***: tony.mark@abc.com
- Roles \***: Supervisor
- Valid From \***: Jun 12, 2025
- Valid Through \***: Nov 12, 2025
- Plant \***: 1000
- Planning Plant**: 1000
- Maintenance Plant**: 1000
- Work Center**: (empty)

At the bottom, there are 'Cancel' and 'Add User' buttons. The 'Upload' button is highlighted in the top center of the form.

4. Click **Add User**.

The user will appear under the *Active Users* tab.

Use **Upload Excel** for bulk creation.

Download the user list via **More** icon > **Download Users List**.

**To modify or deactivate a user:**

- Click **More** icon > **Edit** to update details.
- Click **Deactivate** to disable access. Deactivated users are listed under *Inactive Users*.

## 7.2. Manage User Groups

---

User Groups simplify access control by grouping users with similar responsibilities. This allows admins to assign permissions at the group level instead of individually.

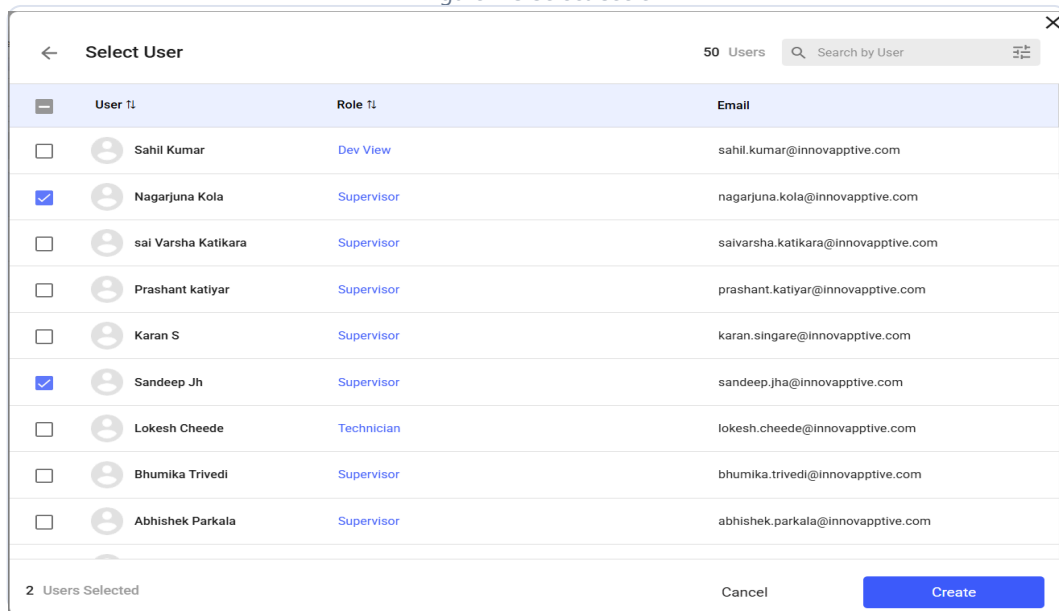
To create a user group:





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

Figure 7-5 Select Users



#### To modify user groups:

- Use **More** icon > **Edit**, **Copy**, or **Delete**.
- To change members:
  - Select the group > click **Modify User List**.
  - Deselect or remove users as needed.

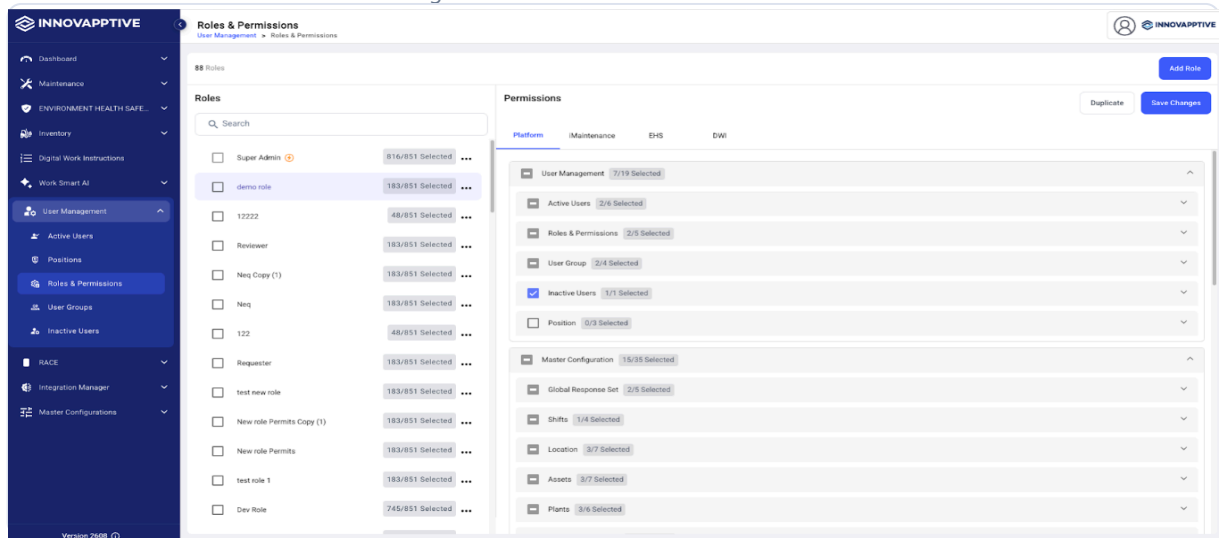
## 7.3. Create Roles and Permissions

Roles determine which modules and features a user can access. Each role can be assigned specific permissions for either CWP 2.0 or iMaintenance.

To create a role and assign permissions:

## 1. Navigate to **User Management > Roles and Permissions**.

Figure 7-6 Roles and Permissions Screen



2. Click **Add Role**.
3. Fill in **Role Name** and **Role Description**.
4. Click **Save**.
5. Select the new role.
6. Choose the modules that are required for the role or persona on the right-side.
7. Click **Save**.

Use **More** icon > **Copy** to clone existing roles.

Use **More** icon > **Delete** to delete the role.



### Note:

- You cannot edit or delete the Super Admin role. You can only copy.
- You cannot delete the role that is already assigned to the user. First, un-assign the user and delete the role.
- You cannot delete roles that are assigned to users or edit the Super Admin role.
- When a user is assigned to a module in the CWP (e.g., the Dashboard module) and given permission to execute work orders in mWorkOrder, they can only access the Dashboard module and perform work order execution in the mobile app. This setup grants the user access to both the web and mobile applications.

## 7.4. Bulk Upload Users

---

Administrators can streamline user creation by uploading multiple user records at once using an Excel template. This method is ideal for onboarding large teams efficiently.

**Note:**

The Work Center field is optional during bulk user creation.

To bulk upload users:

1. Expand the **User Management** and select **Active Users**.
2. Click the More icon on the top right corner and select **Download Template**.
3. Fill out the Excel sheet.
4. Click **Add User > Upload Excel**.
5. Select and upload the file.

## 8. Maintain Master Data

---

The **Master Data** module holds the foundational elements of your system—plants, locations, shifts, assets, units of measurement, and response sets. Proper configuration ensures consistency across forms, workflows, and analytics.

This chapter has the following topics:

- [Create a Plant \(on page 37\)](#)
- [Create a Shift \(on page 39\)](#)
- [Create a Location \(on page 39\)](#)
- [Create an Asset \(on page 40\)](#)
- [Create UOM \(on page 41\)](#)
- [Create a Global Response Set \(on page 42\)](#)
- [Bulk Upload Master Data \(on page 43\)](#)

### 8.1. Create a Plant

---

To create a plant:

1. Navigate to **Master Data > Plants**.

Figure 8-1 Plants Screen

Plants

Master Data > Plants

Search

Create

More

| Name                   | Plant Id T1 | Type T1     | Country T1 | Plant Timezone T1 | State T1       | Language T1         | Zip Code | Actions |
|------------------------|-------------|-------------|------------|-------------------|----------------|---------------------|----------|---------|
| Innovapptive           | 234         | Planning    | India      | UTC +05:30        | Andhra Pradesh | Spanish (Argentina) | 245      | ...     |
| Innovapptive           | 234         | Plant       | India      | UTC +05:30        | Andhra Pradesh | Spanish (Argentina) | 245      | ...     |
| Hamburg                | 1000        | Planning    | --         | --                | --             | --                  | --       | ...     |
| Hamburg                | 1000        | Maintenance | --         | --                | --             | --                  | --       | ...     |
| Hamburg                | 1000        | Plant       | --         | --                | --             | --                  | --       | ...     |
| St. Petersburg Florida | 3000        | Planning    | --         | --                | --             | --                  | --       | ...     |
| St. Petersburg Florida | 3000        | Plant       | --         | --                | --             | --                  | --       | ...     |
| St. Petersburg Florida | 3000        | Maintenance | --         | --                | --             | --                  | --       | ...     |

2. Click **Create New**.

3. In the **Create Plant** window, fill in the following fields:

- Name, Plant ID, Plant Type, Country, Zip Code, State, Time Zone, and Shifts.
- Enable **Shift Handover Report** toggle if needed.



**Note:**

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

4. Under the **Additional Details** section, add custom Labels & Fields.

5. Click **Create**.

Figure 8-2 Create Plant

Plants

Master Data > Plants

Search

Create

More

| Name                   | Plant Id T1 | Type T1     | Country T1 | Plant Timezone T1 |
|------------------------|-------------|-------------|------------|-------------------|
| Innovapptive           | 234         | Planning    | India      | UTC +05:30        |
| Innovapptive           | 234         | Plant       | India      | UTC +05:30        |
| Hamburg                | 1000        | Planning    | --         | --                |
| Hamburg                | 1000        | Maintenance | --         | --                |
| Hamburg                | 1000        | Plant       | --         | --                |
| St. Petersburg Florida | 3000        | Planning    | --         | --                |
| St. Petersburg Florida | 3000        | Plant       | --         | --                |
| St. Petersburg Florida | 3000        | Maintenance | --         | --                |

×

Create Plant

Name \*

Boiler Plant

Plant Id \*

BP309

Select Plant Type \*

Maintenance

Country \*

Italy

Zip Code \*

988298

State \*

Alessandria

Select Language \*

English (UK)

Time Zone \*

Europe/Rome (UTC +02:00)

Cancel

Create

Use **More** icon to **Copy**, **Edit**, or **Delete**.

## 8.2. Create a Shift

To create a shift:

1. Navigate to **Master Data > Shifts**.
2. Click **Create New**.
3. In the **Create Shift** window, fill in the following details:
  - Name, Plant, Start Time, End Time.
  - Set **Active** toggle to make the shift active.
4. Click **Create**.

Figure 8-3 Create Shift

The screenshot shows the 'Shifts' table in the 'Master Data > Shifts' section. The table has two columns: 'Shift Name' and 'Start & End Time'. It contains one entry: 'Noon Shift' with a time range of '12:00 - 18:00'. Overlaid on the right is the 'Create Shift' dialog box. This dialog has a close button (X) at the top left. It contains a 'Name' field with the text 'Morning Shift'. Below this are two time selection fields: 'Start Time' set to '09:30' and 'End Time' set to '11:30', each with a clock icon. At the bottom of the dialog is an 'Active' toggle switch, which is currently turned on (green). At the very bottom of the dialog are two buttons: 'Cancel' and 'Create'.

| Shift Name | Start & End Time |
|------------|------------------|
| Noon Shift | 12:00 - 18:00    |

**Create Shift**

Name

Start Time

End Time

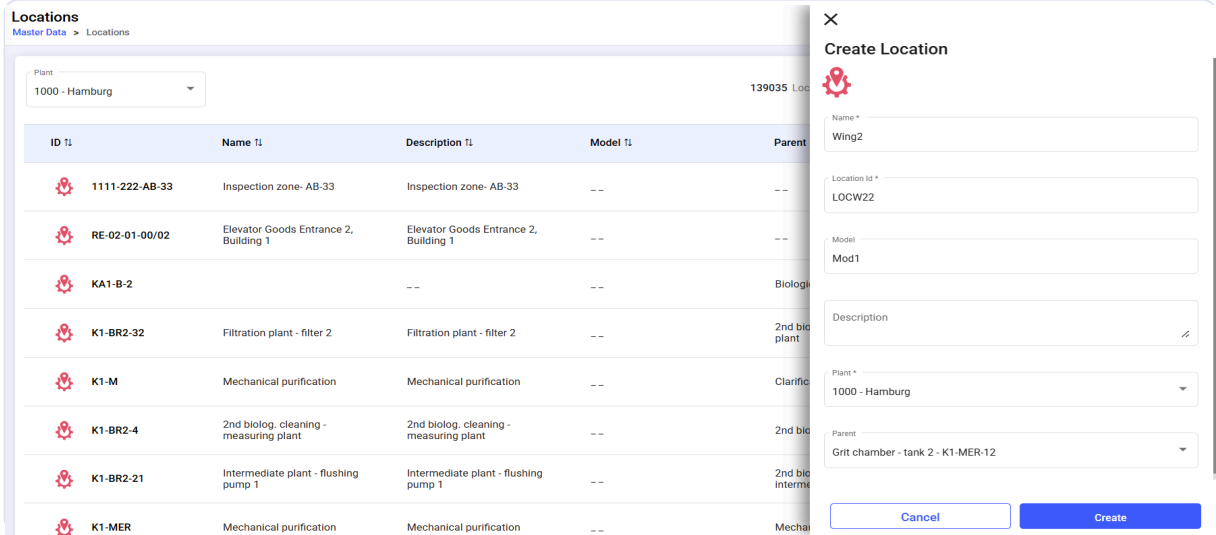
Active ☒

## 8.3. Create a Location

To create a location:

- 1. Navigate to **Master Data > Locations**.
- 2. Click **Create New > Create Manually**.
- 3. In the **Create Location** window, fill in the details, such as Name, Location ID, Model, Description, Plant, and Parent.
- 4. Click **Create**.

Figure 8-4 Create Location



# 8.4. Create an Asset

To create an asset:



1. Navigate to **Master Data > Assets**.
2. Click **Create New > Create Manually**.
3. In the **Create Assets** screen, fill in the fields, such as Name, Asset ID, Model, Description, Plant, Parent Type/Name.
4. Click **Create**.

Figure 8-5 Create Asset

**Assets**  
Master Data > Assets

Plant: 1000 - Hamburg

| ID       | Name                  | Description           | Model   | Parent          |
|----------|-----------------------|-----------------------|---------|-----------------|
| 10257176 | Excavator-01          | Excavator-01          | 5000    | --              |
| 10257175 | Conductors pump       | Conductors pump       | --      | Pump, E 1000099 |
| 10257174 | Conductors            | Conductors            | --      | Pump, E 1000099 |
| 10257173 | Pump bearing 15/5     | Pump bearing 15/5     | --      | --              |
| 10257172 | COMPRESSOR PLANT-1000 | COMPRESSOR PLANT-1000 | hrx-10  | Compr 1000700   |
| 10257171 | TRACE EDT-123         | TRACE EDT-123         | hrx-10  | EDT DE 1025719  |
| 10257170 | EDT DEVICE AB-2       | EDT DEVICE AB-2       | --      | EDT DE 1025719  |
| 10257169 | EDT DEVICE AB-1       | EDT DEVICE AB-1       | hrx-100 | --              |

**Create Asset**

Name \*  
Boiler Machine

Asset Id \*  
AS239821

Model  
AS239821

Description:

Plant \*  
1000 - Hamburg

Parent Type ☐ Location ☒ Asset

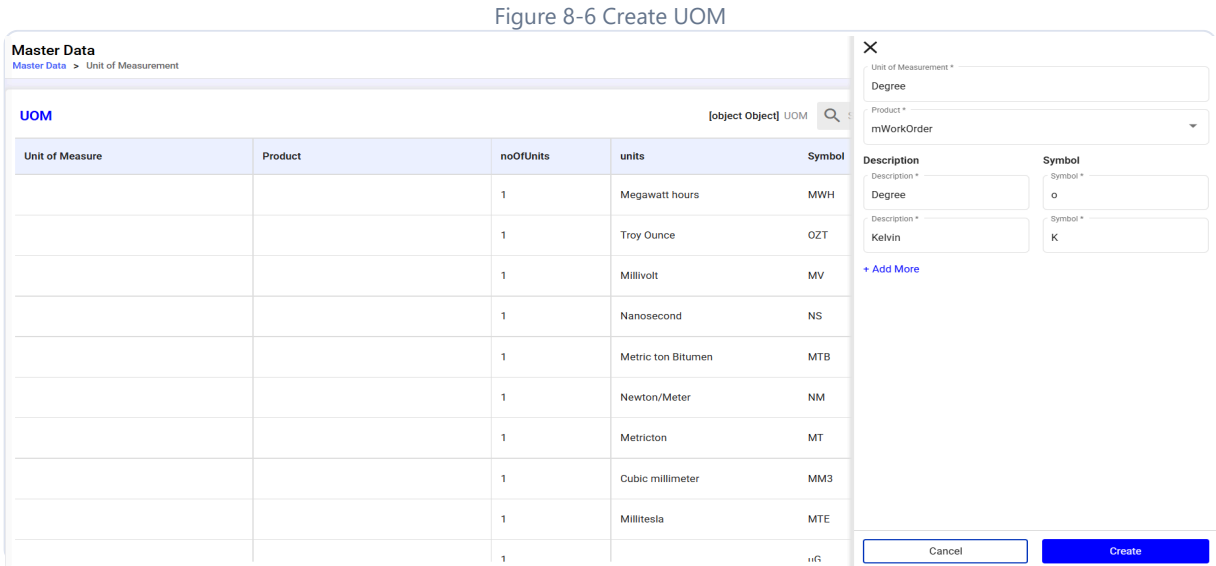
Parent  
--

Cancel Create

## 8.5. Create UOM

To create a UOM:

- 1. Navigate to **Master Data > Unit of Measurement**.
- 2. Click **Create New > Create Manually**.
- 3. In the **Create Unit** window, fill in the following fields:
  - Measurement Type, Description, Symbol.
  - Add more entries as needed.
- 4. Click **Create**.



## 8.6. Create a Global Response Set

To create a global response set:

1. Go to **Master Data > Global Response Set**.
2. Click **Create New > Create Manually**.
3. In the **Create Global Response Set** window, fill in the following fields:
  - Name, Description, and Metadata Type.
  - Add response values.
4. Click **Save**.

Figure 8-7 Create Global Response Set

| Title              | Responses | Created By |
|--------------------|-----------|------------|
| All                | 1         | --         |
| All                | 1         | --         |
| All                | 1         | --         |
| All                | 1         | --         |
| All                | 1         | --         |
| All                | 1         | --         |
| All                | 1         | --         |
| All                | 1         | --         |
| Cylinder Condition | 5         | --         |
| Cylinder Condition | 5         | --         |

## 8.7. Bulk Upload Master Data

Bulk upload reduces manual effort for setting up master data.

To bulk upload master data:

1. Navigate to the respective module (Locations, Assets, UOM, or Response Sets).
2. Click the More icon on top right corner and select **Download Template**.
3. Fill out the Excel sheet.
4. Click **Create New > Upload Excel**.
5. Select and upload your file.

## 9. Configure iMaintenance Core Settings

---

The **Core Settings** in iMaintenance define how the product behaves across your entire organization. These settings control fundamental aspects of daily use, such as session timeouts, chat availability, measuring points, auto-timers, AI enablement, issue creation, root cause analysis, attachments, and more.

Although many of these options are stored at the database level, they directly influence **how technicians, supervisors, and administrators experience the product every day**. Functional teams should review these configurations to ensure they align with business processes, while IT teams may assist in applying the changes.

By configuring these core settings, you can tailor iMaintenance to match your organization's operational needs, improve usability, and enforce consistent standards across all users.



### Note:

To modify the configurations, use the below collection in the database. Tap on the collection to view the list of configurations, each identified by its respective **"type"**.

**Collection Name: Configuration**

### 9.1. Enable or Disable Core Modules

---

The Issue, Work Order, and Timesheet modules can be enabled or disabled at both the **tenant** and **plant** levels. These settings determine whether the modules are visible and accessible across the web and mobile applications.

- Use the **tenantLevel flag** to turn a module on or off globally for all plants.
- Use the **plantLevel flag** for more granular control, enabling or disabling modules for individual plants.

#### 1. Issue, Work Order, Timesheet Configurations

- The **Issue, Work Order, Timesheet module Configuration** controls the visibility and accessibility of the *Issue, Work Order, Timesheet modules* across the Tenant or Plant levels within your deployment. Use the following flags to manage access appropriately based on organizational needs.

#### 2. **tenantLevel Flag**

- **Purpose:** Controls module access at the **Tenant** level.
- **Options:**
  - true: Enables the Issue Module for **all plants** under the tenant.
  - false: Disables the Issue Module **globally across all plants**.
  - **Default Value:** true
- Set as true if you want all plants to access the Issue Module.
- Set as false to completely disable the Issue Module across the tenant.

### 3. plantLevel Flag

- **Purpose:** Enables fine-grained control at the **Plant** level.
- **Options:**
  - false: Module access is the same across all plants (as per tenantLevel setting).
  - true: Enables plant-specific control. You **must** provide a valid plant ID for each plant you want to configure.
  - **Default Value:** false
- Set to true if you want to enable/disable the module per plant.
- Set to false if plant-level configuration is not required.

```
Sample Configuration

{
  "_id": {
    "$oid": "6811d64e10cbda7d4d979883"
  },
  "type": "issueConfig", //Type would change for WorkOrder and Timesheet modules
  "config": {
    "tenantLevel": true,
    "plantLevel": true
  },
  "plant": {
    "$oid": "681a86b3aab43f5e132ff5c3"
  }
}
```



#### Note:

- When a module is disabled, both their creation and any related features will be hidden and inaccessible across the Mobile and Web applications.
- Ensure consistency between tenantLevel and plantLevel flags to avoid misconfiguration.
- If plantLevel is set to true, you must maintain a corresponding configuration for each relevant plant.

## 9.2. Configure Work Order Settings

Work Order settings define how iMaintenance enforces controls during the lifecycle of a Work Order — from initiation to completion.

These configurations allow you to:

- Configure Measuring Points
- Automate timing of work execution.
- Trigger issues directly from forms.
- Capture follow-up issues.
- Confirm operations before closure.
- Record and analyze Root Cause Analysis (RCA).

Use these sub-settings to align Work Order execution with your organization's compliance, safety, and operational standards.

### Configure Measuring Points

The Measuring Point (MP) Configuration manages the visibility and availability of measuring points across key modules within the system. Admins can control this setting at both the Tenant and Plant levels, based on operational requirements.

- **Enable or disable measuring point features** across all or selected modules. Supports module-level visibility for: Functional Location, Equipment, Issue, Asset, Asset360, Work Order, Work Order Operation.
- Configuration is stored in the **database** and applied per tenant or plant.

**Table 9-1 Default Settings**

| Setting            | Default Value | Description                                                |
|--------------------|---------------|------------------------------------------------------------|
| tenantLevel        | TRUE          | Measuring Point is available across all plants by default. |
| plantLevel         | TRUE          | Enables plant-specific control of MP visibility.           |
| functionalLocation | TRUE          | Measuring Point visible in Functional Location module.     |
| workOrder          | TRUE          | Measuring Point visible in Work Order module.              |
| workOrderOperation | TRUE          | Measuring Point visible in Work Order Operation.           |
| issue              | TRUE          | Measuring Point visible in Issue module.                   |
| asset              | TRUE          | Measuring Point visible in Asset module.                   |
| asset360           | TRUE          | Measuring Point visible in Asset360 view.                  |

**Table 9-1 Default Settings (continued)**

|           |      |                                                   |
|-----------|------|---------------------------------------------------|
| realmSync | TRUE | Measuring Point included in realm sync processes. |
|-----------|------|---------------------------------------------------|

## Sample Configuration

```
{
  "_id": {
    "$oid": "67fdffef33f2f7a34586fbf3"
  },
  "type": "measuringPointConfig",
  "config": {
    "tenantLevel": true,
    "functionalLocation": true,
    "workOrder": true,
    "workOrderOperation": true,
    "issue": true,
    "asset": true,
    "asset360": true,
    "realmSync": true,
    "plantLevel": true
  },
  "plant": {
    "$oid": "681a86b3aab43f5e132ff5c3"
  }
}
```



### Note:

- By default, Measuring Points are enabled across all modules and all plants.
- Use tenantLevel = false and plantLevel = true to apply visibility settings for specific plants.
- All module-level flags (functionalLocation, workOrder, etc.) must be explicitly set to true or false depending on business needs.
- Disabling a module flag will hide measuring points from that specific module across the Web and Mobile applications.

## Configure Auto Timer

The Auto Timer Configuration controls whether an automatic timer is enabled for Operations during Work Order execution. This setting can be managed at both the Tenant and Plant levels to align with organizational workflow preferences.

Admins can control the behavior of the Auto Timer feature using the following configuration options:

- Enable/Disable Auto Timer
- Allow Technician to Edit Timer
- Enable Background Time Calculation

**Table 9-2 Default Settings**

| Setting | Default Value | Description |
|---------|---------------|-------------|
|---------|---------------|-------------|

**Table 9-2 Default Settings (continued)**

|            |      |                                                                      |
|------------|------|----------------------------------------------------------------------|
| enabled    | TRUE | Enables the Auto Timer by default.                                   |
| editable   | TRUE | Allows the Technician to edit the timer manually.                    |
| background | TRUE | Timer is auto-calculated in the background without user interaction. |

### Sample Configuration

```
{
  "_id": {
    "$oid": "6788b584c3ca9a2f538dbc19"
  },
  "type": "autoTimer",
  "plant": {
    "$oid": "681a06b3aab43f5e132ff5c3"
  },
  "config": {
    "enabled": true,
    "background": true,
    "editable": true
  }
}
```

**Note:**

- If enabled is set to false, the Auto Timer feature is disabled entirely for that tenant or plant.
- If editable is false, the Technician will not be allowed to adjust the timer manually during execution.
- If the background is false, time tracking will require manual start/stop by the Technician.

## Configure Raise Issue at Form Submission level

The Raise Issue Configuration controls whether an Issue can be raised automatically when a Digital Form is submitted. This setting is configurable at both the Tenant and Plant levels to support enterprise-specific workflows.

- Enables or disables the triggering of issues from form submissions.
- Supports use cases where form-based inspections or checklists can result in actionable issue records.

**Table 9-3 Default Settings**

| Setting   | Default Value | Description                                                            |
|-----------|---------------|------------------------------------------------------------------------|
| formLevel | FALSE         | When false, the system will allow raising issues from form submission. |

### Sample Configuration



```
"_id": {
  "$oid": "6821e6077218a319b2e8bb68"
},
"type": "raiseIssue",
"config": {
  "formLevel": false
},
"plant": {
  "$oid": "681a06b3aab43f5e132ff5c3"
}
```

**Note:**

- When formLevel is set to false, issue creation will be triggered automatically upon digital form submission.
- If formLevel is set to true, the raise issue option will be suppressed on form submission screens.
- This setting is useful for controlling noise or limiting automated issue creation in certain workflows or plant environments.

## Configure Raise Follow-up Issue

The Raise Follow-up Issue Configuration defines how follow-up issues are handled when linked to a Work Order. This setting is applicable at the Tenant Level and helps streamline corrective workflows after execution tasks.

- Enables or disables the ability to raise follow-up issues from within a Work Order.
- Admins can configure how the follow-up issue behaves:
  - independentIssue – Creates a new, standalone issue with no linkage to the original work order.
  - linkToWorkOrder – Automatically links the follow-up issue to the originating work order.
  - linkAndDelinkToWorkOrder – Auto-links the issue to the work order but gives Supervisors the option to delink if needed.

**Table 9-4 Default Settings**

| Setting                  | Default Value | Description                                                            |
|--------------------------|---------------|------------------------------------------------------------------------|
| tenantLevel              | TRUE          | Applies configuration across all plants under the tenant.              |
| raiseFollowUpIssue       | TRUE          | Enables the follow-up issue creation capability.                       |
| independentIssue         | FALSE         | Follow-up is not created as standalone by default.                     |
| linkToWorkOrder          | FALSE         | Follow-up is not auto-linked only.                                     |
| linkAndDelinkToWorkOrder | TRUE          | Follow-up is auto-linked, with an option to delink (default behavior). |

### Sample Configuration

```
{
  "_id": {
    "$oid": "682495bc6f18a452d982a852"
  },
  "type": "raiseFollowUpIssueConfig",
  "config": {
    "tenantLevel": true,
    "raiseFollowUpIssue": true,
    "independentIssue": false,
    "linkToWorkOrder": false,
    "linkAndDelinkToWorkOrder": true
  }
}
```

**Note:**

- This setting only applies at the tenant level; plant-level overrides are not supported at this time.
- Ensure that only one mode is set to true at a time to avoid conflicting behaviors.
- If raiseFollowUpIssue is set to false, no follow-up issue options will be presented during or after Work Order execution.
- The linkAndDelinkToWorkOrder mode offers flexibility and is recommended for most operational scenarios.

## Configure Operation Confirmation

The Operation Confirmation Configuration controls whether operation-level confirmations are enabled during Work Order execution. This configuration can be managed at both the Tenant and Plant levels to suit specific operational or compliance requirements.

- Allows enabling or disabling operation confirmations (e.g., start/complete or quantity confirmations) for each operation step within a Work Order.
- Useful in industries where granular tracking of operation progress is required for compliance, audits, or productivity metrics.

**Table 9-5 Default Settings**

| Setting     | Default Value | Description                                                          |
|-------------|---------------|----------------------------------------------------------------------|
| tenantLevel | FALSE         | Operation confirmation is not enabled at the tenant level by default |
| plantLevel  | FALSE         | Operation confirmation is not enabled at any plant level by default  |

### Sample Configuration

```
{
  "_id": {
    "$oid": "6847e24eb8edacc8be69cf93"
  },
  "type": "operationConfirmationConfig",
  "config": {
    "tenantLevel": false,
    "plantLevel": false
  },
  "createdAt": {
    "$date": "2025-05-28T12:45:00.000Z"
  },
  "updatedAt": {
    "$date": "2025-05-28T12:45:00.000Z"
  }
}
```

**Note:**

- If both tenantLevel and plantLevel are set to false, operation confirmations will be hidden from the UI and not required during Work Order execution.
- Enabling confirmation at plantLevel requires specifying the plant context in the configuration document.
- Use this feature to enforce process discipline and track execution detail at a more granular level.

## Configure Work Order RCA

The Work Order RCA (Root Cause Analysis) Configuration defines whether RCA tracking is enabled at both the Work Order and Work Order Operation levels. This configuration allows organizations to enforce structured problem analysis during or after maintenance execution at either the Tenant or Plant level.

- Enables Root Cause Analysis feature as part of the Work Order lifecycle.
- Configurable at:
  - Tenant Level – Applies across all plants.
  - Plant Level – Allows plant-specific overrides (if supported in implementation).
- RCA visibility and workflow can be toggled for:
  - workOrderLevel – RCA enabled at the overall Work Order level.
  - workOrderOperationLevel – RCA enabled for each individual operation/task.

**Table 9-6 Default Settings**

| Setting        | Default Value | Description                                      |
|----------------|---------------|--------------------------------------------------|
| tenantLevel    | TRUE          | RCA settings apply across all plants by default. |
| workOrderLevel | TRUE          | RCA is enabled at the Work Order level.          |

Table 9-6 Default Settings (continued)

|                         |      |                                               |
|-------------------------|------|-----------------------------------------------|
| workOrderOperationLevel | TRUE | RCA is enabled for each Work Order operation. |
|-------------------------|------|-----------------------------------------------|

Sample Configuration

```
"_id": {
  "$oid": "6846ceb4efb99e538fa46336"
},
"type": "workOrderRCAConfig",
"config": {
  "tenantLevel": true,
  "workOrderLevel": true,
  "workOrderOperationLevel": true
}
```



Note:

- If workOrderLevel is false, RCA will not be visible or required at the Work Order header level.
- If workOrderOperationLevel is false, RCA will be hidden from individual operation steps.
- Enabling both levels provides full visibility into root causes at both macro (order) and micro (operation) levels—ideal for high-compliance or reliability-focused environments.
- These settings are useful for supporting failure analysis, audit trails, and continuous improvement initiatives.

## 9.3. Configure User Experience Controls

User Experience (UX) controls define how iMaintenance appears and responds to users across both web and mobile applications.

These settings apply at a product-wide level and influence everyday interactions — from how long a session remains active, to whether chat and attachments are available, to how lists and key fields are displayed.

By configuring these options, administrators can:

- Standardize how users access and share information.
- Control the visibility of supporting features such as chat and attachments.
- Enforce consistent formats and templates for lists, forms, and key mappings.

These configurations ensure a smooth, predictable user experience while aligning iMaintenance with your organization’s compliance and collaboration needs.

### Configure Session Timeout

Session timeout settings define how long a session remains active during inactivity.

- Session timeout can be configured at Tenant Level or Plant level.
- Default Session Timeout is at tenant level and set for 30 mins.
- All sessions login and logouts are captured in DB for audit purposes.
- The highlighted DB values should be used to manage Session timeout.
  - Session Timeout can be Enabled or Disabled by setting True or False.
  - Duration can be set in Million Seconds. Ex 30 mins/ 1800000 Ms

```
{
  "_id": {
    "$oid": "6788b5dec3ca9a2f538dbc1c"
  },
  "type": "sessionTimeout",
  "plant": {
    "$oid": "681a06b3aab43f5e132ff5c3"
  },
  "config": {
    "enabled": true,
    "duration": 1800000
  }
}
```

User is shown with a warning message when session is timed out and redirected to login screen.

## Configure Chat Controls

The Chat Configuration controls chat functionality at both Tenant and Plant levels. It allows administrators to enable chat for specific modules and define push notification behavior.

- Enable or disable chat features across tenants or specific plants.
- Module-specific control: Currently supports the Issue and Work Order modules.
- Push notification customization: Choose between receiving all messages or only @mentions.

**Table 9-7 Default Settings**

| Setting                   | Default Value | Description                                        |
|---------------------------|---------------|----------------------------------------------------|
| chat                      | TRUE          | Enables chat feature globally.                     |
| issueModule               | TRUE          | Chat enabled for Issue Module by default.          |
| workOrderModule           | TRUE          | Chat enabled for Work Order Module by default.     |
| pushNotifications.all     | FALSE         | Sends notifications for all messages.              |
| pushNotifications.mention | TRUE          | Sends notifications only when a user is mentioned. |

### Sample Json Configuration

```

    "_id": {
      "$oid": "67fcd5efffb1552aa9ae6272"
    },
    "type": "chatConfig",
    "_v": 0,
    "config": {
      "chat": true,
      "workOrderModule": true,
      "issueModule": true,
      "pushNotifications": {
        "all": true,
        "mention": false
      },
    },
    "plant": {
      "$oid": "681a06b3aab43f5e132ff5c3"
    }
  )

```

**Note:**

- Configurations are persisted in the database and applied per tenant or plant as needed.
- Admins can selectively disable chat for specific modules by setting the respective module flag (issueModule, workOrderModule) to false.
- Push notification behavior:
  - Set "all": true to notify users on every message.
  - Set "mention": true to notify only on direct mentions (useful for reducing noise).
- A plant entry is required when applying plant-level configurations.

## Configure Attachments

The Attachment Configuration manages how attachments are handled across various modules like Issue, Work Order, Functional Location, Equipment, etc., at both the Tenant and Plant levels. Admins can configure the available repositories, their behaviors, and permitted document types per module.

- Define which modules support attachments (e.g., Issue, Work Order, Asset, Measuring Point).
- Specify one or more repository types for each module:
  - GOS (Generic Object Services)
  - DMS (Document Management System)
  - SharePoint (not shown in the current example but assumed as extensible).
- Configure actions (e.g., create, delete) and document type rules for repositories like DMS.
- Store configuration in the database for runtime enforcement.

**Table 9-8 Default Settings**

| Module | Repositories | Default App ID |
|--------|--------------|----------------|
|--------|--------------|----------------|

**Table 9-8 Default Settings (continued)**

|                    |          |       |
|--------------------|----------|-------|
| Issue              | GOS      | NOATT |
| WorkOrder          | GOS      | WOATT |
| Asset              | GOS, DMS | EQATT |
| FunctionalLocation | GOS, DMS | FLATT |
| MeasuringPoint     | GOS, DMS | MPATT |
| MeansDoc           | GOS, DMS | MDATT |

### Sample Configuration

```

    "_id": {
      "$oid": "6829c964cf146998dc682968"
    },
    "type": "attachments",
    "_v": 0,
    "config": {
      "Issue": {
        "repositories": ["GOS"],
        "appId": "NOATT"
      },
      "WorkOrder": {
        "repositories": ["GOS"],
        "appId": "WOATT"
      },
      "Asset": {
        "repositories": ["GOS", "DMS"],
        "appId": "EQATT"
      },
      "FunctionalLocation": {
        "repositories": ["GOS", "DMS"],
        "appId": "FLATT"
      },
      "MeasuringPoint": {
        "repositories": ["GOS", "DMS"],
        "appId": "MPATT"
      },
      "MeansDoc": {
        "repositories": ["GOS", "DMS"],
        "appId": "MDATT"
      },
      "GOS": {
        "url": "/IWORKORDER_SRV/ProductAttachmentCollection",
        "actions": ["create", "delete"]
      },
      "DMS": {
        "url": "/IWORKORDER_SRV/ProductAttachmentCollection",
        "actions": ["create"],
        "documentTypesConfig": {
          "Issue": [
            {
              "documentType": "DES",
              "documentVersion": "00",
              "documentPart": "000",
              "storageCategory": "DMS_C1_ST"
            },
            {
              "documentType": "DRW",
              "documentVersion": "00",
              "documentPart": "000",
              "storageCategory": "DMS_C1_ST"
            }
          ]
        },
        "WorkOrder": [
            {
              "documentType": "DES",
              "documentVersion": "00",
              "documentPart": "000",
              "storageCategory": "DMS_C1_ST"
            },
            {
              "documentType": "DRW",
              "documentVersion": "00",
              "documentPart": "000",
              "storageCategory": "DMS_C1_ST"
            }
          ]
        },
        "Asset": [
            {
              "documentType": "DES",
              "documentVersion": "00",
              "documentPart": "000",
              "storageCategory": "DMS_C1_ST"
            },
            {
              "documentType": "DRW",
              "documentVersion": "00",
              "documentPart": "000",
              "storageCategory": "DMS_C1_ST"
            }
          ]
        }
      }
    }
  }
}

```



**Note:**

- Repositories such as GOS and DMS must be configured with their respective url endpoints and supported actions (e.g., create, delete).
- DMS repositories support advanced configuration with documentTypesConfig to define rules like:
  - Document Type (e.g., DES, DRW)
  - Version/Part/Storage category.
- Admins should ensure that each module has a valid appId for integration consistency.
- SharePoint configuration is assumed to be supported but not defined in this example. It can follow a similar structure.

## Configure List View

List View Configurations define how records are displayed in the list views for different modules (e.g., Work Orders, Issues, Equipment, Functional Locations). Each configuration controls which Fields are visible, their labels, backend data mappings, and optional formatting types (e.g., Date).

These configurations are managed at the database level and directly affect the user interface layouts for Mobile apps.

**Table 9-9 Common Parameters**

| Field       | Description                                                          |
|-------------|----------------------------------------------------------------------|
| displayName | The label shown to the user in the column header (e.g., "Location"). |
| keyName     | The backend key to fetch data (e.g., location.name, asset.name).     |
| type        | Optional – used for formatting data (e.g., "date" for date fields).  |
| order       | Implicit – the JSON field order defines the column order in the UI.  |

### Work Order List View

```
{
  "_id": { "$oid": "6846aed763dacd6d3628dc94" },
  "type": "workOrderListTemplate",
  "config": {
    "fields": [
      { "displayName": "Location", "keyName": "location.name" },
      { "displayName": "Equipment", "keyName": "asset.name" },
      { "displayName": "Description", "keyName": "description" },
      { "displayName": "Planning Plant", "keyName": "planningPlant.erpPlantId" },
      { "displayName": "Maintenance Plant", "keyName": "maintenancePlant.erpPlantId" },
      { "displayName": "Required Start Date", "keyName": "plannedStartTime", "type": "date" },
      { "displayName": "Required End Date", "keyName": "plannedEndTime" },
      { "displayName": "Created By", "keyName": "createdBy.firstName" },
      { "displayName": "Testing", "keyName": "testing" },
      { "displayName": "Revision", "keyName": "others.revision" },
      { "displayName": "Code Group", "keyName": "others.codeGroupId" },
      { "displayName": "Work Center", "keyName": "workCenter.erpWorkCenterId" },
      { "displayName": "Breakdown", "keyName": "breakdown" }
    ]
  }
}
```

### Issue List View

```
{
  "_id": { "$oid": "6846af3763dacd6d3628dc95" },
  "type": "issueListTemplate",
  "config": {
    "fields": [
      { "displayName": "Location", "keyName": "location.name" },
      { "displayName": "Equipment", "keyName": "asset.name" },
      { "displayName": "Description", "keyName": "description" },
      { "displayName": "Planning Plant", "keyName": "planningPlant.erpPlantId" },
      { "displayName": "Required Start Date", "keyName": "plannedStartTime", "type": "date" },
      { "displayName": "Required End Date", "keyName": "plannedEndTime" },
      { "displayName": "Created By", "keyName": "createdBy.firstName" },
      { "displayName": "Testing", "keyName": "testing" },
      { "displayName": "Revision", "keyName": "others.revision" },
      { "displayName": "Code Group", "keyName": "others.codeGroupId" },
      { "displayName": "Work Center", "keyName": "workCenter.erpWorkCenterId" }
    ]
  }
}
```

### Equipment List View

```
"_id": { "$oid": "6846af6d63dacd6d3628dc96" },
"type": "equipmentListTemplate",
"config": {
  "fields": [
    { "displayName": "Description", "keyName": "description" },
    { "displayName": "Location", "keyName": "location.erpAssetId" },
    { "displayName": "Type", "keyName": "type" },
    { "displayName": "Manufacturer Name", "keyName": "manufacturer.object.name" },
    { "displayName": "Manufactured In", "keyName": "manufacturer.object.country" },
    { "displayName": "Planning Plant", "keyName": "planningPlant.erpPlantId" },
    { "displayName": "Maintenance Plant", "keyName": "maintenancePlant.erpPlantId" }
  ]
}
```

### Functional Location List View:

```
"_id": { "$oid": "6846af8a63dacd6d3628dc97" },
"type": "functionalLocationListTemplate",
"config": {
  "fields": [
    { "displayName": "Type", "keyName": "type" },
    { "displayName": "Manufacturer Name", "keyName": "manufacturer.object.name" },
    { "displayName": "Manufactured In", "keyName": "manufacturer.object.country" },
    { "displayName": "Planning Plant", "keyName": "planningPlant.erpPlantId" },
    { "displayName": "Maintenance Plant", "keyName": "maintenancePlant.erpPlantId" }
  ]
}
```



#### Note:

- All keyName values should map to valid fields defined in the corresponding module's Field Configuration.
- The order of fields in the array defines the column order in the UI.
- Fields with type: "date" will be formatted as per locale/timezone rules.
- These configurations can be modified to customize user-specific or role-based layouts (if supported).

## Configure Innovapptive Key Mapping

```

    "_id": {
      "$oid": "6790eab0f1f16f84aa3de757"
    },
    "type": "innovapptiveKeyMapping",
    "config": {
      "breakdown_ISSUE": "M2",
      "breakdown_WO": "PM03",
      "corrective_ISSUE": "M1",
      "corrective_WO": "PM02",
      "emergency_WO": "EMER",
      "preventive_WO": "PM01",
      "service_ISSUE": "S1",
      "objectCategory_EQ": "IEQ",
      "objectCategory_FL": "IFL",
      "issueSystemStatus": {
        "DLFL,NOCO": "Rejected",
        "OSNO": "Open",
        "NOPR,ORAS": "In-Progress",
        "NOPR": "Released",
        "NOCO": "Completed"
      },
      "woOperationSystemStatus": {
        "CRTD": "Not Started",
        "CLSD": "Completed",
        "REL": "Released",
        "PCNF": "Partial Confirm",
        "MCNF": "Partial Confirm",
        "CNF": "Completed"
      },
      "issueProcessControl": {
        "1": "Allowed",
        "2": "Warning",
        "3": "Prohibited"
      },
      "workOrderSystemStatus": {
        "CRTD": "Created",
        "REL": "Released",
        "TECO": "Closed",
        "CLSD": "Closed"
      }
    },
    "plant": {
      "$oid": "681a06b3aab43f5e132ff5c3"
    }
  }

```

## 9.4. Configure AI

The AI Configuration controls the availability of AI-powered features at both the Tenant and Plant levels. Admins can selectively enable or disable access to specific AI agents used across modules like Issue Management, Work Order Planning, and Technician Assistance.

- Tenant- and Plant-level control over AI feature availability.
- Fine-grained toggles to enable/disable individual AI agents. AI agent features include:
  - AI Assist – Technician assistance during task execution.
  - AI Plan – Smart planning and scheduling recommendations.
  - AI Detect – Fault detection and predictive diagnostics.

**Table 9-10 Default Settings**

| Setting     | Default Value | Description                                                             |
|-------------|---------------|-------------------------------------------------------------------------|
| tenantLevel | TRUE          | AI features enabled across all plants by default.                       |
| aiAssist    | TRUE          | Enables the AI Assist feature.                                          |
| aiPlan      | TRUE          | Enables AI-driven planning capabilities (assumed field, not in sample). |
| aiDetect    | TRUE          | Enables AI-based fault detection and diagnosis (assumed field).         |

### Sample Configuration

```
{
  "_id": {
    "$oid": "68065dcd91f242c6956f47ca"
  },
  "type": "aiConfig",
  "config": {
    "tenantLevel": true,
    "aiIssue": true,
    "aiWorkOrder": true,
    "aiAssist": true
  }
}
```

**Note:**

- AI configurations are stored in the database and can be customized per tenant or plant.
- If tenantLevel is set to false, plant-level overrides must be defined with associated plant IDs.
- Each AI agent (aiAssist, aiPlan, aiDetect) can be individually toggled based on usage needs and licensing.
- Ensure consistent settings across modules and levels to avoid unexpected behavior in AI feature availability.

# 10. Integrate External Systems

The **Integration Manager** module connects the Innovapptive platform to external ERP systems, enabling seamless data flow between your operational tools and enterprise backend. It supports **real-time syncs**, **offline handling**, and **automated data exchanges**.

Earlier, integrating operator round data with SAP PM and PI Historian demanded custom code and weeks of work.

Now, with RACE and Integration Manager, admins link mobile round data to PI tags and SAP work orders using a no-code interface. Anomalies flow instantly from the field to SAP PM.

Impact, 60% faster integration, improved data consistency, and seamless automation from shop floor to enterprise.

## 10.1. Understand the Integration Workflow

Integration Manager supports three types of data synchronization:

| Type                        | Description                                                                                                                                                          |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Inbound Integration</b>  | Imports master data (plants, locations, assets) from ERP to the Innovapptive platform. Usually done during tenant on-boarding.                                       |
| <b>Outbound Integration</b> | Pushes transactional data (e.g., issues, work orders) from the platform to ERP.                                                                                      |
| <b>Delta Sync</b>           | Periodically syncs offline transactions by detecting and posting new/updated records once connectivity is restored. Runs via a scheduled cron job (every 2–4 hours). |

Mobile users receive a consistent experience as master and transactional data are shared across web and mobile.

## 10.2. Connect to ERP

Connecting the platform to the ERP system is a simple one-time setup.

To connect to ERP:

1. Navigate to **Integration Manager** in the left panel.
2. In the **Integrations** screen, click **Connect** next to your ERP system.

Once connected:

- Inbound sync brings master data (plants, assets, locations) into the platform.
- Outbound transactions are pushed to the ERP automatically.

# 11. Manage Maintenance Operations

This chapter covers the key modules that help supervisors and technicians manage work orders and reported issues in real-time. It includes the **Maintenance Control Center (MCC)** and the **Observations module**, both of which are essential for planning, assigning, and tracking maintenance activities efficiently.

This chapter has the following topics:

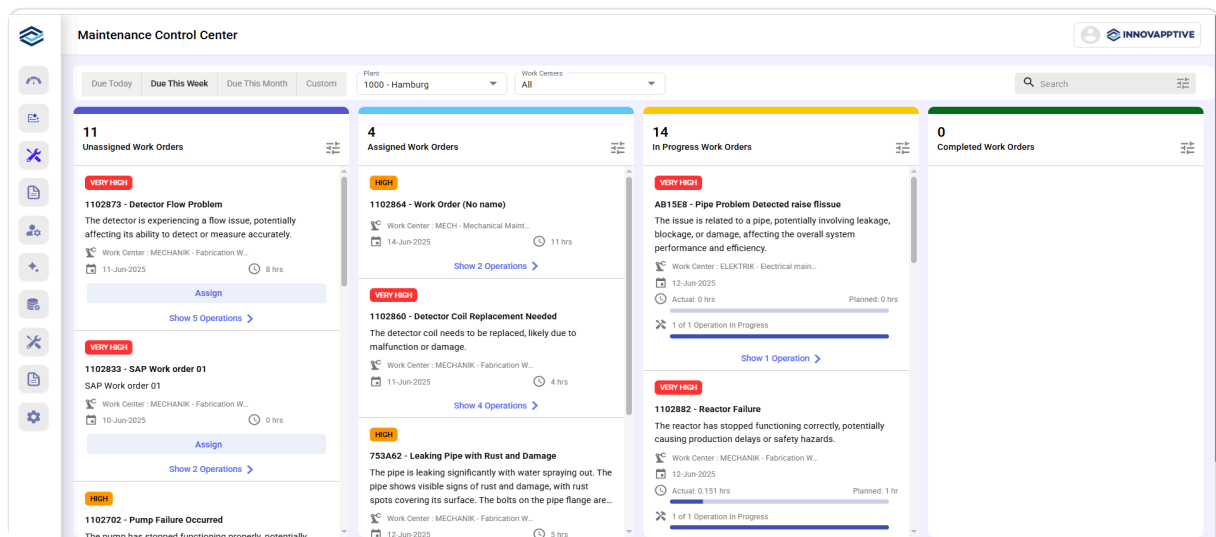
- [Use the Maintenance Control Center \(MCC\) \(on page 63\)](#)
- [Assign a Work Order to a Technician \(on page 64\)](#)
- [Assign a Work Order at Header and Operation Level \(on page 65\)](#)
- [Review Observations \(on page 67\)](#)

## 11.1. Use the Maintenance Control Center (MCC)

The **Maintenance Control Center (MCC)** is a central module within the iMaintenance application that helps supervisors efficiently track and manage work orders and operations.

In this module, you can,

- View all work orders, categorized by status and sorted by start date.
- Assign or reassign work orders and individual operations.
- Filter, search, and monitor real-time progress.
- Optimize scheduling, resource utilization, and task completion.



## View Work Orders by Status

Work orders are categorized into the following tabs:

- **Unassigned Work Orders:** Not yet assigned to any technician.
- **Assigned Work Orders:** Assigned but not yet started.
- **In Progress:** Currently being executed, showing planned vs. actual hours.
- **Completed:** Finished work orders with detailed performance data.

## Search and Filter

---

You can:

- Use the **Search bar** (top-right) to find specific work orders.
- Apply **filters** by clicking the **Filter icon**, including:
  - Date ranges: Due Today, Due This Week, Due This Month, Custom.
  - Plants, Revision, Planner Group, and Work Centers.
  - Priority levels: Very High, High, Medium, Low.

## Configure Fields

---

You can view, add, or remove fields based on templates defined in RACE, without affecting existing mobile implementations.

To Configure:

1. Click the **Configuration** icon next to the Search bar.
2. Under the **Field Configurations** tab:
  - Click the Add Field button to add the fields you need.
  - Adjust fields order using the Up and Down arrow icons.
  - Delete unnecessary fields using the Delete icon.

## 11.2. Assign a Work Order to a Technician

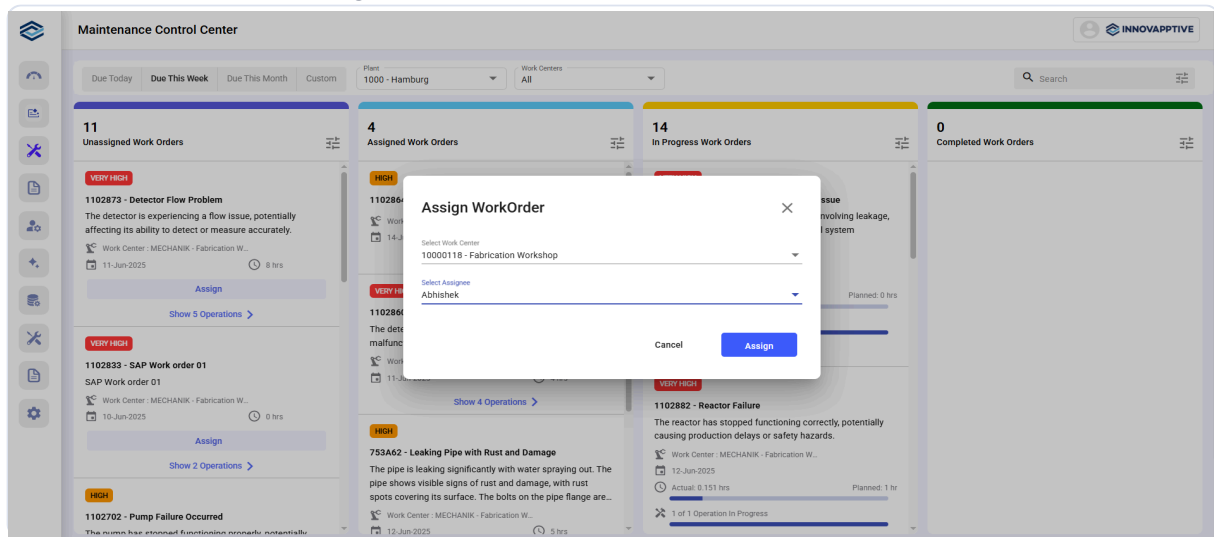
---

Work orders can be assigned directly from the **Unassigned Work Orders** list.

To assign a work order to a technician:



1. Navigate to the **Maintenance Control Center**.
2. Select a work order under **Unassigned Work Orders**.



3. Click **Assign**.
4. In the **Assign Work Order** pop-up, select the **Work Center** and **Technician (Assignee)**.
5. Click **Assign**.

The work order now moves to the **Assigned** tab and is visible in the technician's iMaintenance mobile app.

## 11.3. Assign a Work Order at Header and Operation Level

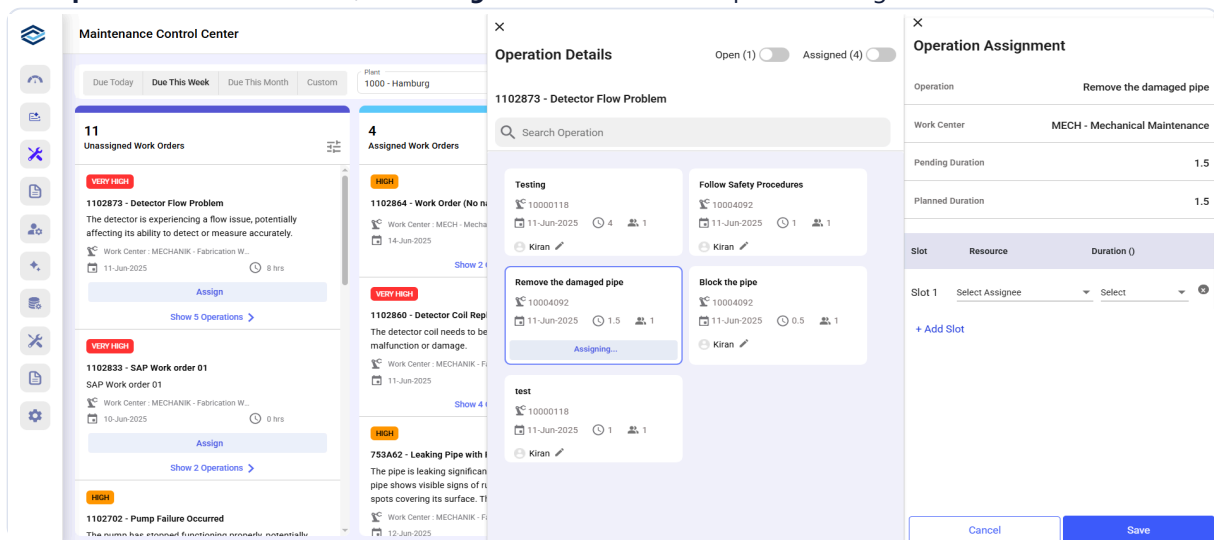
You can assign work orders and operations within a work order to different technicians for more granular task management.

To assign a work order at the header level:

1. In the **Maintenance Control Center** screen, click **Assign** for the desired work order.
2. In the **Assign Work Order** window:
  - Select the **Work Center** from the drop-down.
  - Select **Assignee** from the drop-down list.
  - Click **Assign**.

To assign a work order at the operation level:

3. In the **Maintenance Control Center** screen, click **Show <X> Operation(s)** for the desired work order.
4. In the **Operation Details** window, click **Assign Technician** on the operation widget.



5. In the **Operation Assignment** window:
  - Select a technician from the **Resource** drop-down. (The resources list is displayed based on the Plant).
  - Select the operation duration.
  - Click **Add Resource** to assign multiple resources if needed.
  - Click **Save**.

**Note:**

- Click **Edit** next to the technician's name to make changes.
- You can change the assignee **until the work order is marked as Completed**.

# 12. Review Observations

The **Observations** module allows supervisors to view and manage issues reported through the iMaintenance mobile app. These issues are typically tied to specific assets and locations within a plant.

This section has the following topics:

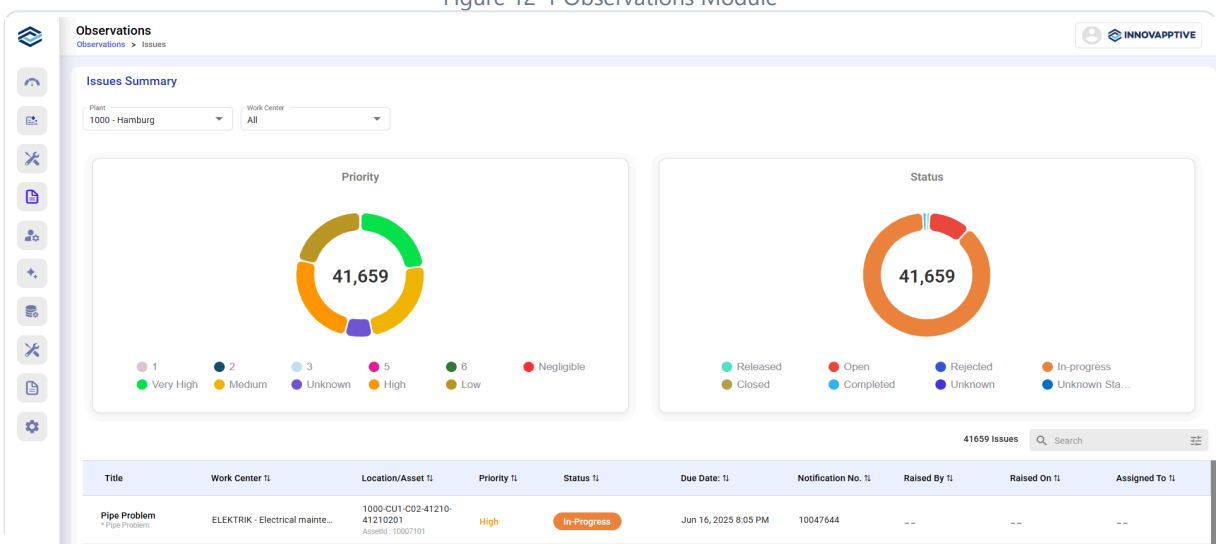
- [View Observations \(on page 67\)](#)
- [Edit Issue Details \(on page 67\)](#)
- [Change Priority with Risk Matrix \(on page 68\)](#)

## 12.1. View Observations

To access observations:

1. Click the **Observations** module in the left navigation.
2. View a list of issues, shown with:
  - Status and priority visualizations (graphs).
  - Issue title, description, plant, location, and priority.

Figure 12-1 Observations Module



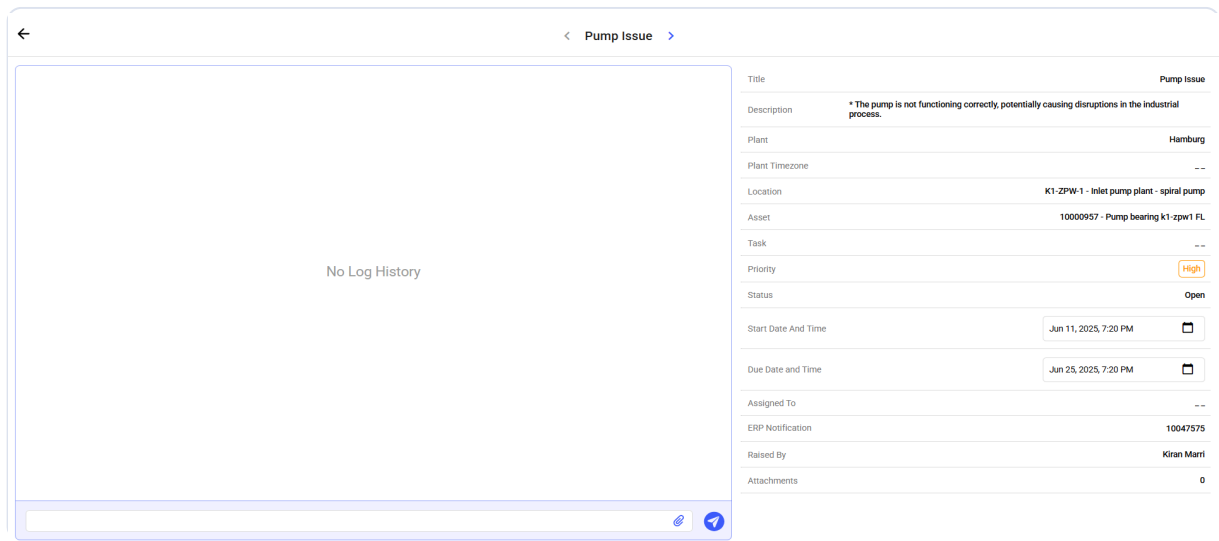
## 12.2. Edit Issue Details

To edit issue details:

Click on an issue.

In the **Issue Details** screen, you can,

- Edit **Priority**
- Change the **Start Date & Time**
- Modify the **Due Date & Time**



## 12.3. Change Priority with Risk Matrix

To change priority:

1. Click the **Priority** (e.g., Major, Minor, Moderate, Negligible).

2. In the **Preview Matrix** window:

- Select values across four categories:
  - **People**
  - **Assets**
  - **Environment**
  - **Likelihood**
- Each category includes questions to evaluate risk level.

The screenshot shows the 'Preview Matrix' dialog box in the RACE application. The dialog is titled 'Preview Matrix' and has a close button (X). It contains a 'Matrix Name' field with the value 'PAER Matrix'. Below this, there are two main sections: 'People' and 'Assets'. Each section has a blue header with a dropdown arrow. Under 'People', there are two questions: 'What is the potential impact on people in the event of this risk materializing?' and 'What is the likelihood of this risk occurring?'. The first question has two buttons: 'Catastrophic' and 'Major'. The second question has two buttons: 'Almost Certain' and 'Likely'. Under 'Assets', there are two questions: 'What is the potential impact on assets due to this risk?' and 'What is the likelihood of this risk occurring?'. The first question has two buttons: 'Catastrophic' and 'Major'. The second question has two buttons: 'Moderate' and 'Low'. The background shows a list of matrices and a table of created matrices.

3. Based on responses, the system calculates the **Final Response Criteria** (new priority).

4. Click **Update** to apply changes.

This ensures consistent, risk-based prioritization of reported issues.

# 13. Design and Manage Forms

---

Forms are essential for capturing structured field data in the iMaintenance mobile application. This chapter covers everything from manually creating and publishing forms to leveraging AI for auto-generation to managing archived forms.

This section has the following topics:

- [Create & Publish Forms. \(on page 70\)](#)
- [Auto Assign Forms \(on page 74\)](#)
- [Add Measuring Point Section \(on page 76\)](#)
- [Use Generative AI to Create Forms \(on page 78\)](#)

## 13.1. Create and Publish Forms

---

Build forms using a visual builder that lets you define pages, sections, questions, and response types. These forms can be tailored to different inspection or reporting scenarios, improving consistency and usability in the field.

You can also configure which fields should be auto-populated and set them as editable or read-only based on your requirements.

To create and publish a form:

1. Expand the **Forms** module.
2. Click **Embedded Forms** in the left menu.
3. Click **Create New** on the right side.

4. In the **Form Details** screen, provide the following:

| Field                           | Description                                                                                           |
|---------------------------------|-------------------------------------------------------------------------------------------------------|
| <b>Form Name</b>                | Enter a name (e.g., Equipment Inspection).                                                            |
| <b>Description</b>              | Describe the purpose of the form.                                                                     |
| <b>Instance Type</b>            | Select <i>Single</i> or <i>Multiple Instance</i> .                                                    |
| <b>Plant</b>                    | Select the applicable plant.                                                                          |
| <b>Tags</b>                     | Add tags to categorize the form.                                                                      |
| <b>Auto Assignment of Forms</b> | Assign Forms based on Equipment, Functional Location, Tasklist, Maintenance Plan and Work order Type. |
| <b>Measuring Point Section</b>  | Add Measuring Point category of Equipment and Functional location.                                    |
| <b>Additional Details</b>       | (Optional) Add custom fields with Labels (max 25 chars) and Values (max 40 chars).                    |

Figure 13-1 Add Form Details

The screenshot shows the 'Form Details' screen in the iMaintenance Configuration Guide. The screen has a header with a 'Back to List' button and a progress bar with two steps: 'Form Details' (active) and 'Add Fields'. There are 'Cancel' and 'Next' buttons in the top right corner. The main content area contains a 'Form Details' section with the following fields:

- Form Name \***: A text input field with the placeholder 'Name'.
- Description**: A text input field with the placeholder 'Add Description'.
- Instance Type \***: A dropdown menu with the placeholder 'Instance Type'.
- Plant \***: A dropdown menu with the placeholder 'Plant'.
- Tags**: A text input field with the placeholder 'Start typing to see tags'.

Below the 'Form Details' section is an 'Auto Assign Form' section with the text 'Auto Assign form at field level' and an 'Add' button.

5. Click **Next**.



6. In the **Add Fields** screen, a default section with 4 fields is auto-populated to help you get started. Here you can:

- Add **Pages**, then **Sections** within each page.
- Insert **Fields (Questions)** into sections.
- Select **Response Type** (text, multiple choice, slider, etc.)
- Rename, reorder, or delete fields and change response types as needed.
- Rename sections to match your workflow.

Each Response Type is a field/input type used in the Authoring Module of Platform modules.

| Response Type | Description                                     | Supported Properties                                                                                                                       |
|---------------|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Read Only     | Displays reference data. No user input allowed. | Add Logic, Default Value, Localization, Enable, Required, Input Data.                                                                      |
| Text          | Free text input (e.g., title, descriptions).    | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Type                                                         |
| Number        | Numeric values field                            | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Unit, History, Range, Formula, and Unit of Measurement (UoM) |
| Date & Time   | Calendar input for date & time values.          | Additional Details, Localization, Enable, Required, Date & Time Format                                                                     |
| Signature     | Captures digital signatures from users.         | Additional Details, Localization, Enable, Required                                                                                         |
| Scan          | Uses device camera to scan QR/barcode.          | Additional Details, Localization, Enable, Required                                                                                         |
| Hyperlink     | Clickable link to web or document resources.    | Additional Details, Localization, Enable, Required, Add Link                                                                               |
| User          | Selects a user from the system.                 | Add Logic, Default Value, Additional Details, Localization, Enable, Required                                                               |
| Slider        | Selects a value from a defined scale.           | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Range, History                                               |
| Geo Location  | Captures GPS location of user.                  | Additional Details, Localization, Enable, Required                                                                                         |
| Add Photo     | Upload images for visual evidence.              | Additional Details, Localization, Enable, Required                                                                                         |
| Form          | Embeds a nested form within the main form.      | Add Logic, Forms, Field Configurations, Additional Details, Localization, Enable, Required.                                                |

7. Once done, click **Publish**.

The form is now live and visible in the *My Forms* screen with *Published* status. It is also posted to SAP based on the configuration.

## 13.2. Auto Assign Forms

---

Set up rules to automatically assign embedded forms to Work Orders based on criteria such as Equipment, Functional Location, Task List, Maintenance Plan, Order Type, or other attributes.

### Configure Auto Assignment

---

To configure auto assignment:

## 1. Add Auto Assignment Rule

- Click the **Add** button under the **Auto Assign Forms** section.
- A **pop-up window** will open with a tabbed view.

## 2. Define Assignment Criteria

The pop-up has **four tabs**, each representing a criteria type:

### a. Functional Location / Equipment

- View a **hierarchical structure** of functional locations and equipment related to the selected Plant.
- Select one or more nodes where the form should auto-attach.

### b. Work Order Type

- Displays a list of available WO types.
- Use checkboxes to select one or multiple types.

### c. Maintenance Plan

- Displays all available maintenance plans.
- Multi-select support is available.

### d. Task List

- Displays task lists.
- Supervisors can select one or more lists for auto-assignment.



### 1. Add Measuring Point Section

In the Form Details, click **Add Measuring Point Section**.

#### 2. Select EQ/FLOC with Measuring Point Category.

a. Choose whether the MP section should be tied to:

- **Equipment (EQ)**
- **Functional Location (FLOC)**
- **Both**

b. Select **Measuring Point Categories** (e.g., M, N, P).

c. Each chosen category will create an individual MP subsection within the form.

d. Example: Selecting *M* and *N* will display two subsections in mobile, each showing MPs belonging to that category.

This ensures MPs are pulled dynamically from the appropriate header context.

#### 3. Publish Form

a. Once published, the form configuration stores metadata for the MP section.

b. On mobile, the section will:

- Fetch MPs via API using EQ/FLOC values.
- Display MPs grouped by category.
- Allow users to capture readings directly.

#### Mobile Experience

- The MP section will appear in the form at the configured position.
- MPs are fetched dynamically based on **header-level EQ/FLOC**.
- Each MP will display fields for data entry (e.g., value, unit, timestamp).
- **MP Count** will be shown per EQ/FLOC for better user visibility.
- If no MPs exist → section displays *"No Measuring Points available"*.

Figure 13-4 Add Measuring Points

**Add Measuring Point Sections** ⬆

Each selected category will create a separate section in the form for both Equipment and Functional Location measuring points.

|                     |                         |
|---------------------|-------------------------|
| Equipment           | Category <span>▼</span> |
| Functional Location | Category <span>▼</span> |

# 13.4. Use Generative AI to Create Forms

You can speed up form creation by using AI to either **describe** the form you need or **upload an image/pdf** of a physical form.

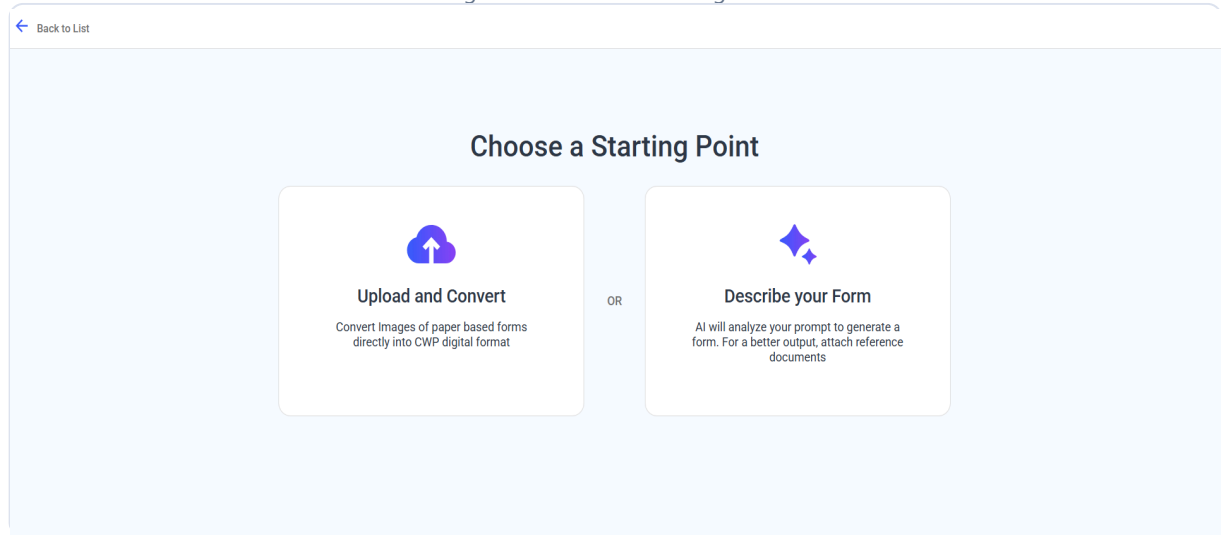
Table 13-1 Two AI-driven options:

| Option             | Description                                                             |
|--------------------|-------------------------------------------------------------------------|
| Upload and Convert | Converts scanned images or PDFs of paper forms into digital forms.      |
| Describe Your Form | AI reads a prompt or attached reference docs and auto-generates a form. |

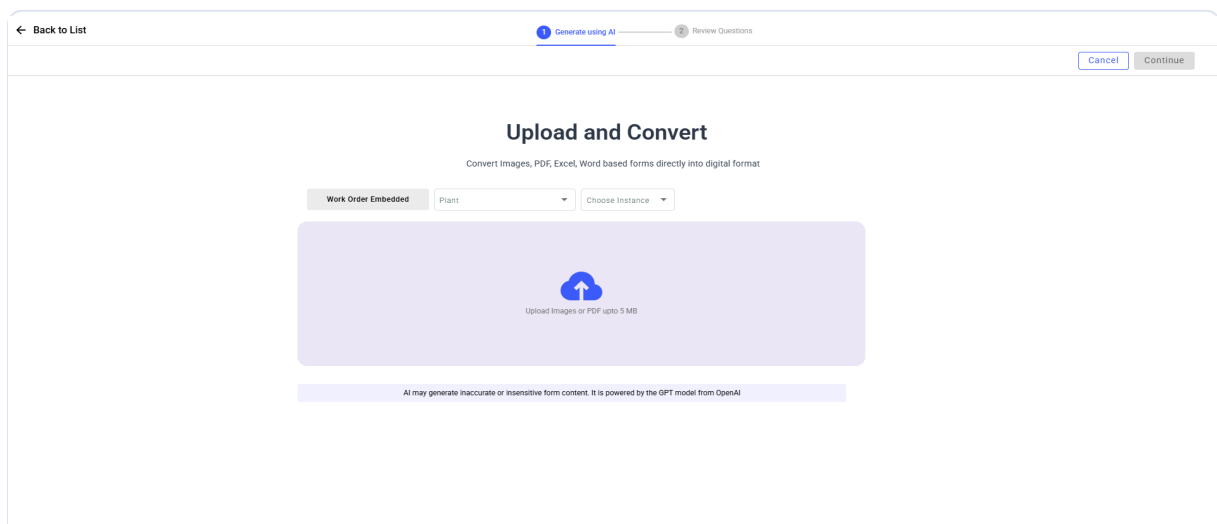
# Upload and Convert

1. Navigate to the **Forms** module and click **Create using AI**.
2. In the **Choose a Starting Point** screen, select **Upload and Convert**.

Figure 13-5 Choose Starting Point



3. In the **Generate Using AI** screen, choose:
  - **Plant**
  - **Instance Type** (Single/Multiple).



4. Upload the **image or PDF** of the form.

5. Click **Continue**.
6. AI generates the form with relevant sections and fields.
7. In the **Review Questions** screen, make changes if needed and click **Publish**.

Figure 13-6 Review Questions

## Describe Your Form

1. In **Choose a Starting Point** screen, select **Describe Your Form**.
2. In the **Generate using AI** screen, enter a prompt in the **text field**.
3. Select:
  - **Plant**
  - **Instance Type** (Single/Multiple).

4. (Optional) Attach reference documents.



5. Click **Enter**.

AI generates the form with relevant sections and fields.

6. Click **Continue**.

7. In the **Review Questions** screen, review and edit the generated form.

8. Click **Publish**.

## Form Management Actions

---

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

- **Edit** a form: Click the **More icon** next to a form > *Edit*.
- **Copy** a form: *More icon* > *Copy*.
- **Archive** a form: *More icon* > *Archive*.

Archived forms appear in the Archived module.

## 13.5. Bulk Upload Forms

---

Upload multiple forms at once using a pre-defined Excel template to streamline form creation

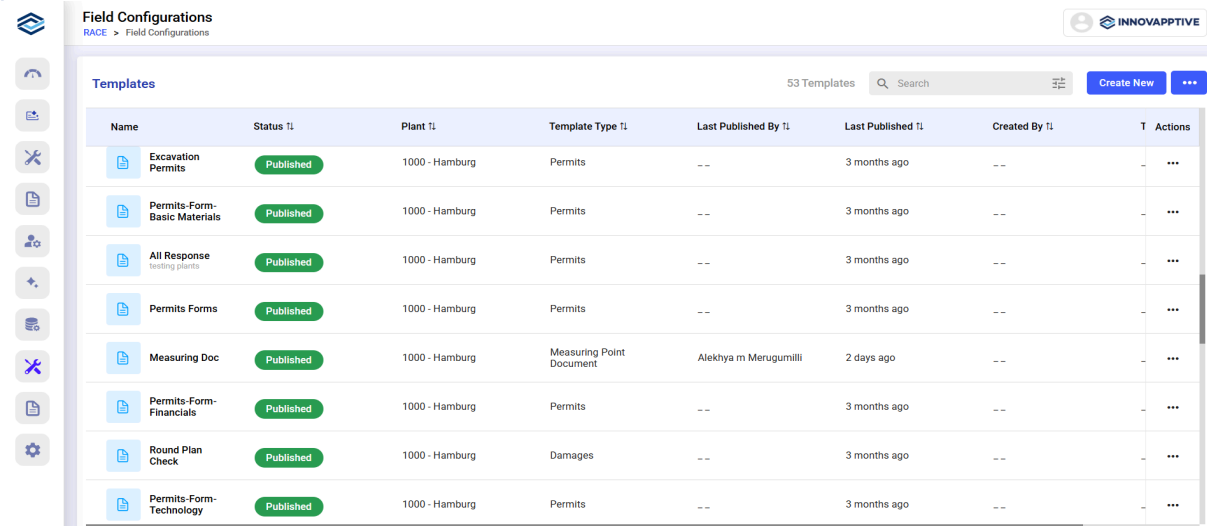
To bulk upload forms:

1. Expand **Forms** and select **Embedded Forms**.
2. Click the More icon on the top right corner and select **Download Excel Template**.
3. Fill out the Excel sheet.
4. Click **Create New** > **Upload Excel**.
5. Select and upload the file.

# 14. Set Up Configurations with RACE

The **RACE (Rapid Application Configuration Engine)** module is the administrative toolkit that allows you to define how forms work on mobile, localize the platform's language, and optimize mobile data sync behavior by user roles. These configurations help tailor the iMaintenance experience without requiring code changes.

Figure 14-1 Field Configurations



The screenshot shows the 'Field Configurations' interface. At the top, there's a header with the 'Field Configurations' title and a breadcrumb 'RACE > Field Configurations'. On the right, there's a user profile icon and the 'INNOVAPPTIVE' logo. Below the header, there's a 'Templates' section with a search bar and a 'Create New' button. The main part of the interface is a table listing various templates. The table has columns for Name, Status, Plant, Template Type, Last Published By, Last Published, Created By, and Actions. The templates listed include 'Excavation Permits', 'Permits-Form-Basic Materials', 'All Response', 'Permits Forms', 'Measuring Doc', 'Permits-Form-Financials', 'Round Plan Check', and 'Permits-Form-Technology'. Each template has a 'Published' status and is associated with the '1000 - Hamburg' plant.

| Name                         | Status    | Plant          | Template Type            | Last Published By    | Last Published | Created By | Actions |
|------------------------------|-----------|----------------|--------------------------|----------------------|----------------|------------|---------|
| Excavation Permits           | Published | 1000 - Hamburg | Permits                  | --                   | 3 months ago   | --         | ...     |
| Permits-Form-Basic Materials | Published | 1000 - Hamburg | Permits                  | --                   | 3 months ago   | --         | ...     |
| All Response                 | Published | 1000 - Hamburg | Permits                  | --                   | 3 months ago   | --         | ...     |
| Permits Forms                | Published | 1000 - Hamburg | Permits                  | --                   | 3 months ago   | --         | ...     |
| Measuring Doc                | Published | 1000 - Hamburg | Measuring Point Document | Alekhyam Merugumilli | 2 days ago     | --         | ...     |
| Permits-Form-Financials      | Published | 1000 - Hamburg | Permits                  | --                   | 3 months ago   | --         | ...     |
| Round Plan Check             | Published | 1000 - Hamburg | Damages                  | --                   | 3 months ago   | --         | ...     |
| Permits-Form-Technology      | Published | 1000 - Hamburg | Permits                  | --                   | 3 months ago   | --         | ...     |

This chapter has the following topics:

- [Create Field Configurations Templates \(on page 82\)](#)
- [Manage Localization \(on page 104\)](#)

## 14.1. Create Field Configurations Templates

Field Templates are reusable form structures used in the mobile app for issue reporting, inspections, and other workflows. You can define pages, sections, and tasks and configure how users interact with the form.

To create and publish a template:

1. Navigate to **RACE > Field Configurations**.
2. Click **Create New** on the top-right.

Figure 14-2 Create New

Field Configurations

RACE > Field Configurations

INNOVAPPTIVE

Templates

53 Templates

Search

Create New

| Name                                                                                                                            | Status TL | Plant TL       | Template Type TL         | Last Published By TL   | Last Published TL | Created By TL | T | Actions |
|---------------------------------------------------------------------------------------------------------------------------------|-----------|----------------|--------------------------|------------------------|-------------------|---------------|---|---------|
|  Excavation Permits                            | Published | 1000 - Hamburg | Permits                  | --                     | 3 months ago      | --            | - | ...     |
|  Permits-Form-Basic Materials                  | Published | 1000 - Hamburg | Permits                  | --                     | 3 months ago      | --            | - | ...     |
|  All Response<br><small>testing plants</small> | Published | 1000 - Hamburg | Permits                  | --                     | 3 months ago      | --            | - | ...     |
|  Permits Forms                                 | Published | 1000 - Hamburg | Permits                  | --                     | 3 months ago      | --            | - | ...     |
|  Measuring Doc                                 | Published | 1000 - Hamburg | Measuring Point Document | Alekhyia m Merugumilli | 2 days ago        | --            | - | ...     |
|  Permits-Form-Financials                       | Published | 1000 - Hamburg | Permits                  | --                     | 3 months ago      | --            | - | ...     |

### 3. In the **Template Details** screen:

- Choose **Template Type** such as:
  - Issues
  - Work Order
  - Components
  - Operations
  - Permits
  - Measuring Point
  - Items
  - Causes
  - Damages
  - Activity
  - Tasks
  - Measuring Point Document
  - Timesheet
  - Equipment Details
  - Functional Location Details
- Enter **Template Name**.
- Add **Description**.
- Select **Plant**.
- Add **Tags**.
- Click **Next** on the top-right.

Figure 14-3 Template Details Screen

The screenshot displays the 'Template Details' screen. At the top, there is a navigation bar with a 'Back to List' button on the left and 'Cancel' and 'Next' buttons on the right. Below the navigation bar, there are two tabs: '1 Template Details' (active) and '2 Add Fields'. The main content area is titled 'Template Details' and contains the following fields:

- Template Type \***: A dropdown menu with 'Issues' selected.
- Template Name \***: A text input field containing 'Asset Issue Template'.
- Description**: A text input field containing 'Asset Issue Template'.
- Plant \***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A field containing two tags, 'issues' and 'notification', with a 'Start typing to see tags' prompt.

#### 4. In the **Add Fields** screen:

- Add **Sections** and **Tasks**.
- Define **Response Types** (e.g., Text, Number, Signature, and so on).
- Preview the mobile layout on the right.
- Click **Publish** to make the template live.

Figure 14-4 Add Fields Screen

The screenshot displays the 'Add Fields' screen for a work order creation template. At the top, there's a navigation bar with 'Back to List', 'Template Details', and 'Add Fields' (the current active tab). Below this, the template name 'Control Valve Maintenance' and plant '1000 - Hamburg' are shown. A 'Publish' button is in the top right. The main area is divided into a 'Page' section and a 'Mobile Preview'. The 'Page' section shows a list of fields under an 'Untitled Section'. Fields include 'Site Conducted' (with a dropdown menu), 'Conducted On' (Date & Time), 'Performed By' (Text), 'Location' (Geo Location), and 'label' (Text). There are also checkboxes for 'Enable', 'Required', and 'Allow Multi-Select', and a 'Key Name' field. A 'Mobile Preview' on the right shows the fields as they would appear on a mobile device, with a 'Cancel' button and a 'Create Form' button at the top of the preview.



#### Note:

- Use the **More** icon and select Edit to edit the details.
- Only one template is allowed per plant. You cannot create multiple templates for the same plant.

## 14.1.1. Configure Work Order Creation Template

Work Orders are core to iMaintenance. As an Admin or Supervisor, you can configure the Work Order template using Out-of-the-Box (OOTB) fields—adding or removing fields as needed.

To configure a work order template:

1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Work Order**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-5 Work Order Template

The screenshot displays the 'Template Details' screen for a Work Order Template. The interface includes a top navigation bar with a 'Back to List' button on the left and 'Cancel' and 'Next' buttons on the right. A progress indicator at the top shows '1 Template Details' and '2 Add Fields'. The main form area contains the following fields:

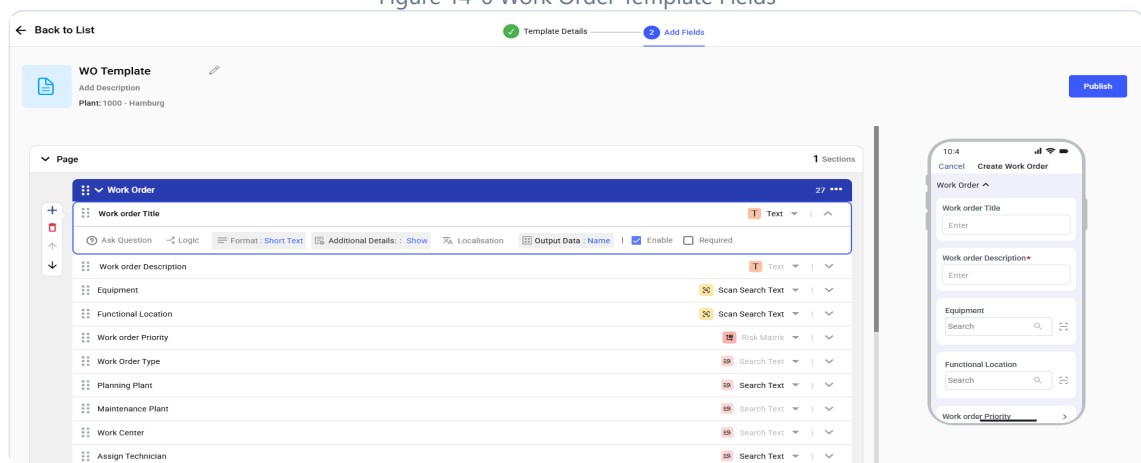
- Template Type \***: A dropdown menu with 'Workorder' selected.
- Template Name \***: A text input field containing 'WO Template'.
- Description**: A text input field with the placeholder 'Add Description'.
- Plant \***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with the placeholder 'Start typing to see tags'.

4. In the **Add Fields** screen:

- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field Name                             | Platform Behavior                       |
|----------------------------------------|-----------------------------------------|
| Work Order Title                       | Free-text; mandatory                    |
| Work Order Description                 | Free-text; mandatory                    |
| Priority                               | Drop-down; configurable via Risk Matrix |
| Equipment                              | Drop-down with search and scan          |
| Functional Location                    | Drop-down with search                   |
| Work Order Type                        | Mandatory; default per persona          |
| User Status                            | Auto-filled from SAP or editable        |
| Assign Technician                      | Select from active users by workcenter  |
| Work Center                            | Auto-populates based on FL or Equipment |
| Planning Plant                         | Synced from user profile or FL          |
| Maintenance Plant                      | Derived from Equipment or FL            |
| Work Order Start Date                  | Date picker; validation logic           |
| Work Order End Date                    | Must be $\geq$ start date               |
| Operations, Components, Permits, Forms | Nested templates; config separately     |
| Attachments                            | Upload; 5MB limit, supports PDF/IMG/MP4 |

Figure 14-6 Work Order Template Fields

5. Click **Publish**.

## 14.1.2. Configure Issue Creation Template

---

Issues are linked to SAP Notifications, and templates define the data captured for safety, maintenance, or quality reporting. As an Admin or Supervisor, you can configure the Issue template using OOTB fields.

To configure an issue template:



1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Issue**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-7 Issue Template

The screenshot shows the 'Template Details' screen in a web application. At the top, there is a navigation bar with a 'Back to List' link on the left and two tabs: '1 Template Details' (active) and '2 Add Fields'. On the right side of the navigation bar are 'Cancel' and 'Next' buttons. The main content area contains a form titled 'Template Details' with the following fields:

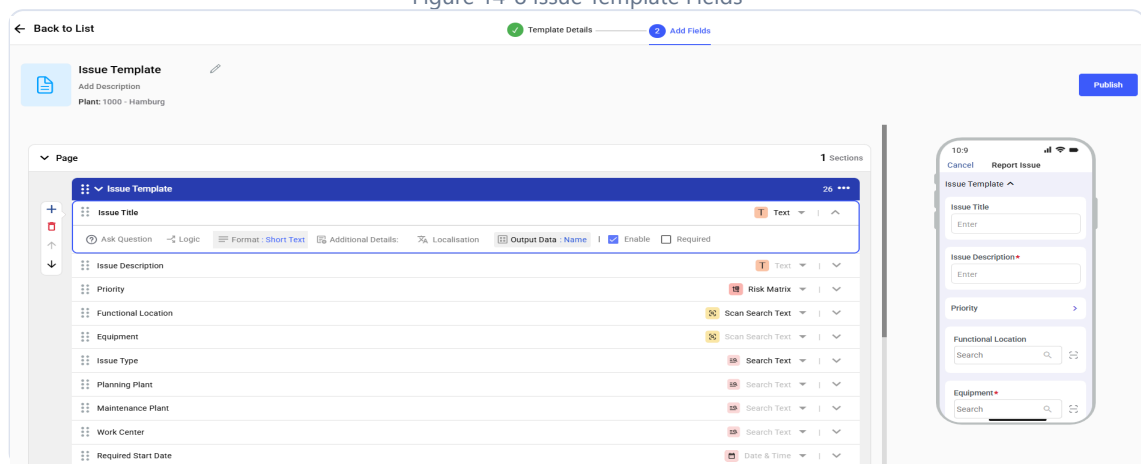
- Template Type \***: A dropdown menu with 'Issues' selected.
- Template Name \***: A text input field containing 'Issue Template'.
- Description**: A text input field with the placeholder text 'Add Description'.
- Plant \***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with the placeholder text 'Start typing to see tags'.

4. In the **Add Fields** screen:

- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field               | Behavior                                                          |
|---------------------|-------------------------------------------------------------------|
| Title               | Mandatory free-text                                               |
| Description         | Mandatory Free text                                               |
| Priority            | Drop-down, auto-color coded from Risk Matrix                      |
| Equipment           | Linked to FL; auto-populate logic; Drop-down with Search and Scan |
| Functional Location | Hierarchical search with drop-down                                |
| Attachments         | File/image support (limit: 25MB)                                  |
| Notification Type   | Default per plant; configurable                                   |
| Maintenance Plant   | Drop-down with search option                                      |
| Planning Plant      | Drop-down with search option                                      |
| Work Center         | Drop-down with search option                                      |
| Required Start Date | Date Field                                                        |
| Required End Date   | Date Field                                                        |

Figure 14-8 Issue Template Fields

5. Click **Publish**.

## 14.1.3. Configure Operation Template

---

Operations define the individual tasks within a Work Order. As an Admin or Supervisor, you can customize the Operation template using OOTB fields. Each Operations template is linked to its corresponding Work Order template for consistent task management.

To configure an operation template:

1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Operation**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-9 Operation Template

The screenshot displays the 'Template Details' screen within a web application. At the top, there is a navigation bar with a 'Back to List' button on the left and a 'Next' button on the right. Below the navigation bar, the main content area contains a form titled 'Template Details'. The form has the following fields:

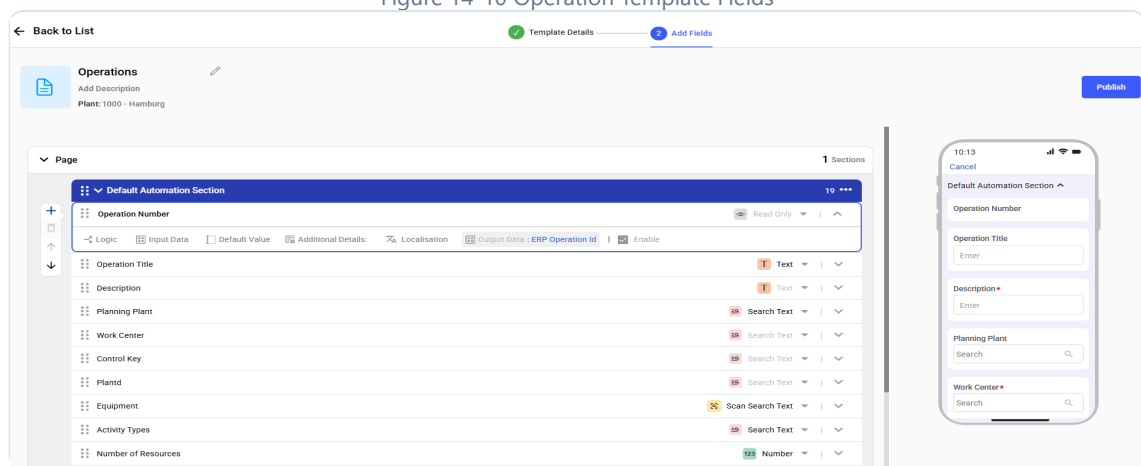
- Template Type \***: A dropdown menu with 'Operations' selected.
- Template Name \***: A text input field containing 'Operations'.
- Description**: A text input field containing 'Add Description'.
- Plant \***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field containing 'Start typing to see tags'.

4. In the **Add Fields** screen:

- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field              | Behavior                                   |
|--------------------|--------------------------------------------|
| Operation Activity | Auto-incremented activity number           |
| Description        | Free-text field                            |
| Work Center        | Drop-down with search option               |
| Control Key        | Drop-down Defines execution type           |
| Plant              | Drop-down; Auto populate based on WO/Issue |
| Planning Plant     | Drop-down with search option               |
| Activity Type      | Drop-down field                            |
| No. of Resources   | Number field                               |
| Work               | Total effort in person-hours; Number field |
| Unit of Work       | Number Field                               |
| Duration           | Duration in unit; Number field             |
| Start Date         | Date Field                                 |
| End Date           | Date Field                                 |

Figure 14-10 Operation Template Fields

5. Click **Publish**.

## 14.1.4. Configure Component Template

---

Components represent materials like spare parts and consumables linked to Work Orders. As an Admin or Supervisor, you can customize the Component template using OOTB fields. The Component template is linked to the corresponding Work Order template.

To configure a component template:

1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Component**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-11 Component Template

The screenshot displays the 'Template Details' screen within a web application. At the top, there is a navigation bar with a 'Back to List' button on the left and 'Cancel' and 'Next' buttons on the right. Below the navigation bar, the main content area contains a form titled 'Template Details'. The form has the following fields:

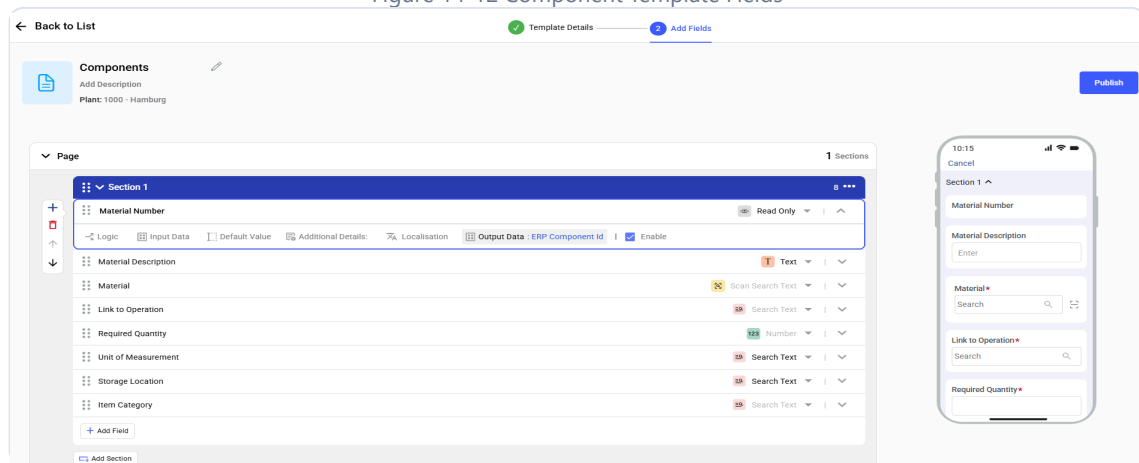
- Template Type \***: A dropdown menu with 'Component' selected.
- Template Name \***: A text input field containing 'Components'.
- Description**: A text input field with the placeholder text 'Add Description'.
- Plant \***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with the placeholder text 'Start typing to see tags'.

4. In the **Add Fields** screen:

- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field                | Behavior                           |
|----------------------|------------------------------------|
| Material Number      | Number Field                       |
| Material Description | Auto-populated                     |
| Item Category        | Drop-down field with search        |
| Required Quantity    | Mandatory, Number field            |
| Unit of Measurement  | Auto-populate from material master |
| Storage Location     | Drop-down with Search              |
| Link to Operation    | Drop-down of existing operations   |

Figure 14-12 Component Template Fields

5. Click **Publish**.

## 14.1.5. Configure Item Template

Items represent materials linked to Issues, such as parts or consumables. As an Admin or Supervisor, you can customize the Item template using OOTB fields. The Item template is connected to the corresponding Issue template.

To configure an item template:



1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Item**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-13 Item Template

The screenshot shows the 'Template Details' screen in the iMaintenance system. The screen has a header with a 'Back to List' button and a progress indicator showing '1 Template Details' and '2 Add Fields'. The main content area contains a form with the following fields:

- Template Type**: A dropdown menu with 'Items' selected.
- Template Name**: A text input field with 'Issue Item' entered.
- Description**: A text input field with 'Add Description' entered.
- Plant**: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with 'Start typing to see tags' entered.

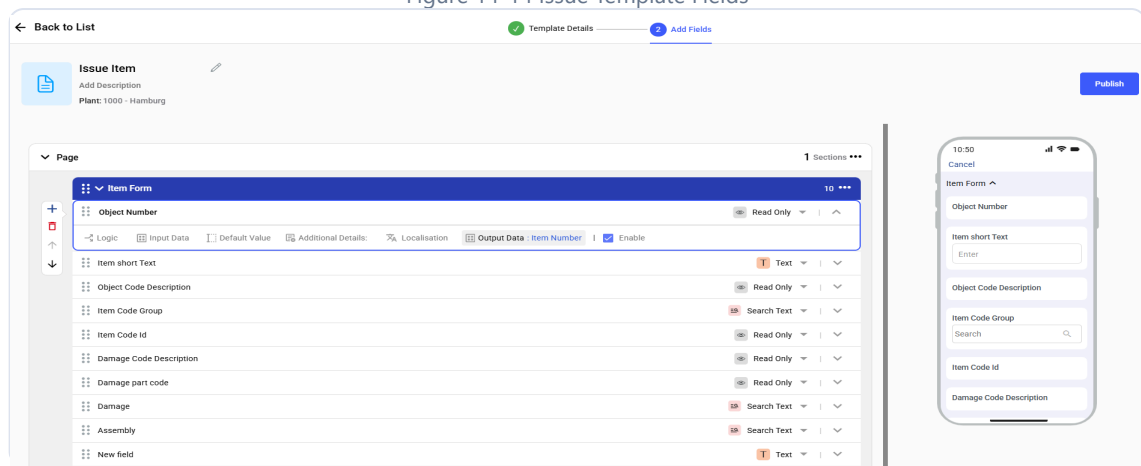
At the bottom right of the screen, there are 'Cancel' and 'Next' buttons.

4. In the **Add Fields** screen:

- a. Add
- Sections**
- and
- Tasks (fields)**
- and define
- response types (behavior)**
- as shown in the table below.

| Field             | Behavior                            |
|-------------------|-------------------------------------|
| Item number       | Auto incremental value              |
| Item Code group   | Drop-down with search               |
| Object part code  | Auto populates from Item Code Group |
| Damage Code group | Drop-down with search               |
| Damage part code  | Auto Populates                      |
| Item short text   | Text field                          |

Figure 14-14 Issue Template Fields

5. Click **Publish**.

## 14.1.6. Configure Cause Template

Causes capture the root reason behind an issue and are linked to the Issue. As an Admin or Supervisor, you can customize the Causes template using OOTB fields. The Cause template is associated with the corresponding Issue template.

To configure a cause template:

1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Cause**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-15 Cause Template

← Back to List

1 Template Details 2 Add Fields

Cancel Next

**Template Details**

**Template Type \***

Causes

**Template Name \***

Issue Causes

**Description**

Add Description

**Plant \***

1000 - Hamburg

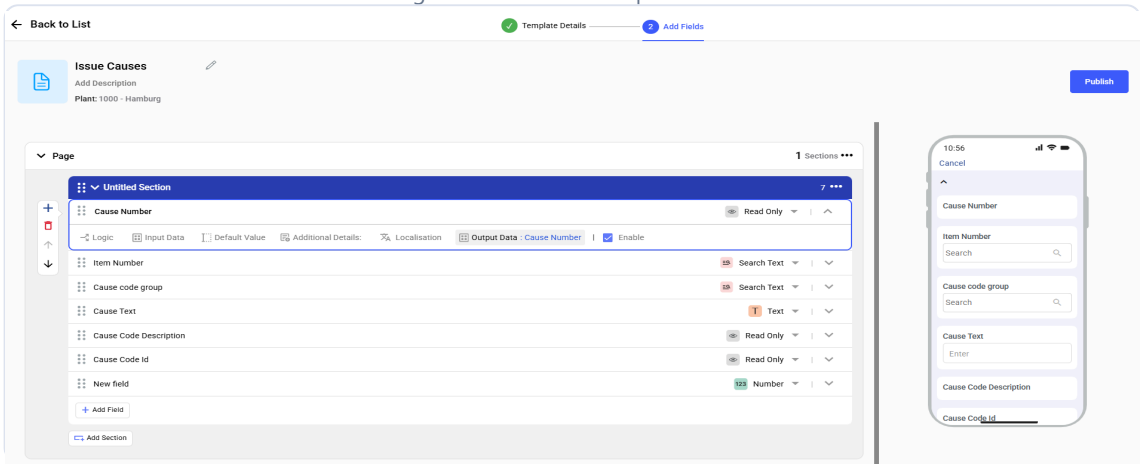
**Tags**

Start typing to see tags

4. In the **Add Fields** screen:
- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field            | Behavior                                  |
|------------------|-------------------------------------------|
| Cause number     | Auto incremental value; Read Only Field   |
| Item number      | Drop-down with search                     |
| Cause code group | Drop-down with search                     |
| Cause code       | Auto-populates from Code group; Read Only |
| Cause text       | Text Field                                |

Figure 14-16 Cause Template Fields



5. Click **Publish**.

# 14.1.7. Configure Activity Template

Activities are detailed tasks within an Issue, used to track execution, performance, and compliance. As an Admin or Supervisor, you can customize the Activity template using OOTB fields. Each Activity template is linked to the corresponding Issue template, enabling structured task management and reporting.

To configure an activity template:

1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Activity**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

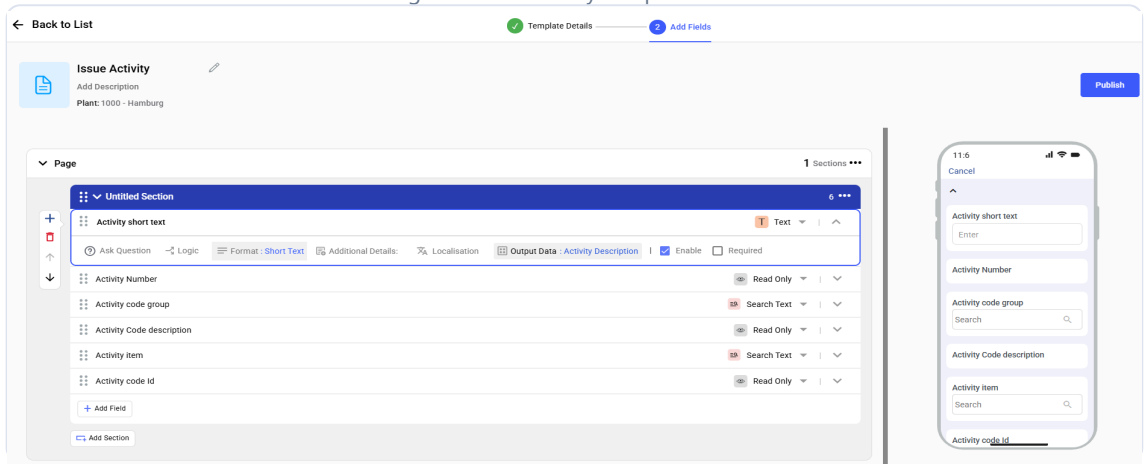
Figure 14-17 Activity Template

The screenshot displays the 'Template Details' screen within a web application. At the top, there is a navigation bar with a 'Back to List' link on the left and 'Cancel' and 'Next' buttons on the right. A progress indicator shows two steps: '1 Template Details' (active) and '2 Add Fields'. The main content area features a 'Template Details' form with the following fields: 'Template Type' (a dropdown menu set to 'Activity'), 'Template Name' (a text input field containing 'Issue Activity'), 'Description' (a text input field with the placeholder 'Add Description'), 'Plant' (a dropdown menu set to '1000 - Hamburg'), and 'Tags' (a text input field with the placeholder 'Start typing to see tags').

4. In the **Add Fields** screen:
- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field                         | Behavior                                         |
|-------------------------------|--------------------------------------------------|
| Activity number               | Auto populates Incremental Number                |
| Item number                   | Auto populate based on Item Field Configurations |
| Activity code group           | Drop-down with Search                            |
| Activity code (Auto populate) | Auto-populated from code group                   |
| Activity short text           | Describes Activity; a text field                 |

Figure 14-18 Activity Template Fields



5. Click **Publish**.

# 14.1.8. Configure Task Template

Tasks represent specific actions within an Issue and are configured using Task templates. As an Admin or Supervisor, you can customize the Task template using OOTB fields. Each Task template is linked to the corresponding Issue template, ensuring consistent action.

To configure a task template:

1. Expand the **RACE** module and click **Field Configurations**.
2. Click **Create New** on the top-right.
3. In the **Template Details** screen:
  - a. Select the **Template Type** as **Task**.
  - b. Enter **Template Name**.
  - c. Add **Description**.
  - d. Select **Plant**.
  - e. Add **Tags**.
  - f. Click **Next**.

Figure 14-19 Task Template

The screenshot shows the 'Template Details' screen in the iMaintenance configuration tool. The screen has a header with a 'Back to List' button and a progress indicator showing '1 Template Details' and '2 Add Fields'. The main content area contains a form with the following fields:

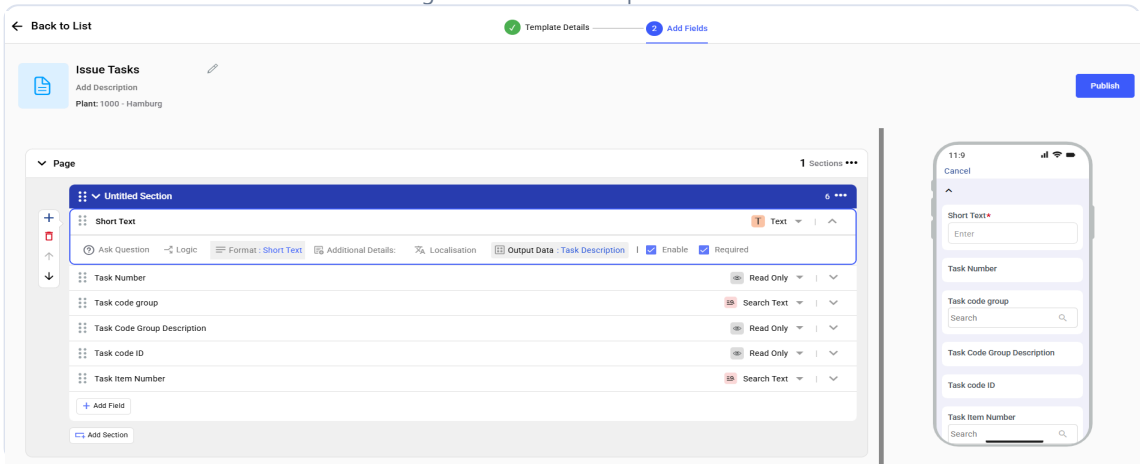
- Template Type \***: A dropdown menu with 'Tasks' selected.
- Template Name \***: A text input field containing 'Issue Tasks'.
- Description**: A text input field containing 'Add Description'.
- Plant \***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field containing 'Start typing to see tags'.

At the bottom right of the screen, there are 'Cancel' and 'Next' buttons.

4. In the **Add Fields** screen:
- a. Add **Sections** and **Tasks (fields)** and define **response types (behavior)** as shown in the table below.

| Field           | Behavior                                         |
|-----------------|--------------------------------------------------|
| Task number     | Auto populates Incremental Number                |
| Item number     | Auto populate based on Item Field Configurations |
| Task code group | Drop-down with Search                            |
| Task code       | Auto-populated from task group                   |
| Task short text | Describes task; a text field                     |

Figure 14-20 Task Template Fields



5. Click **Publish**.

# 14.2. Manage Localization

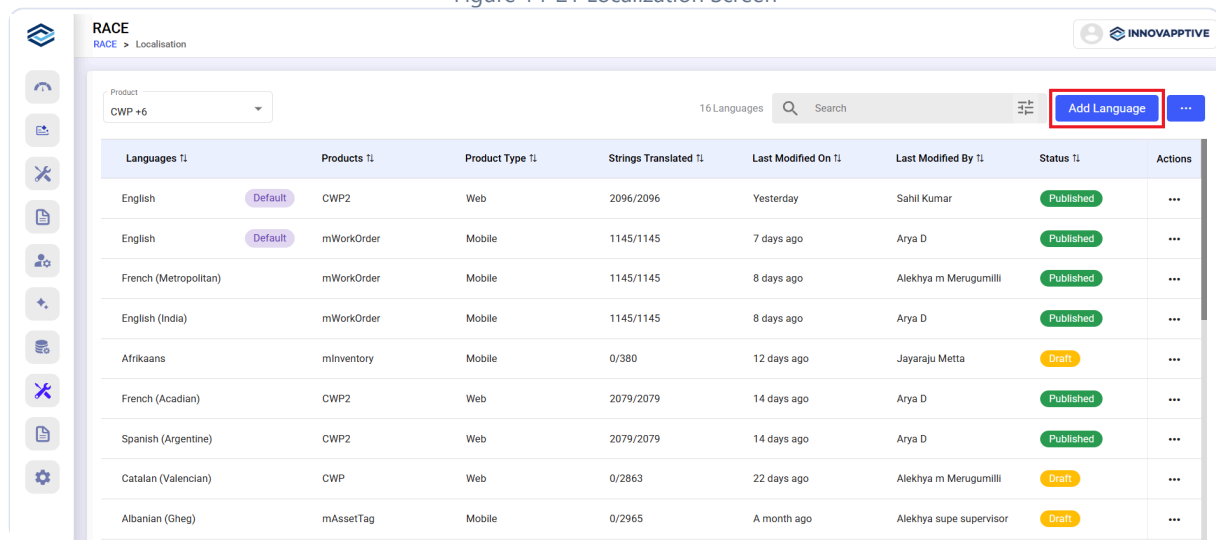
The Localization feature allows Admins to manage language translations for all Innovapptive products—both web and mobile. It’s particularly useful for aligning UI terms with local business terminology or translating content into regional languages.

To add a new language:



1. Expand **RACE** and click **Localization**.
2. Click **Add Language** and select **Add Manually**.

Figure 14-21 Localization Screen



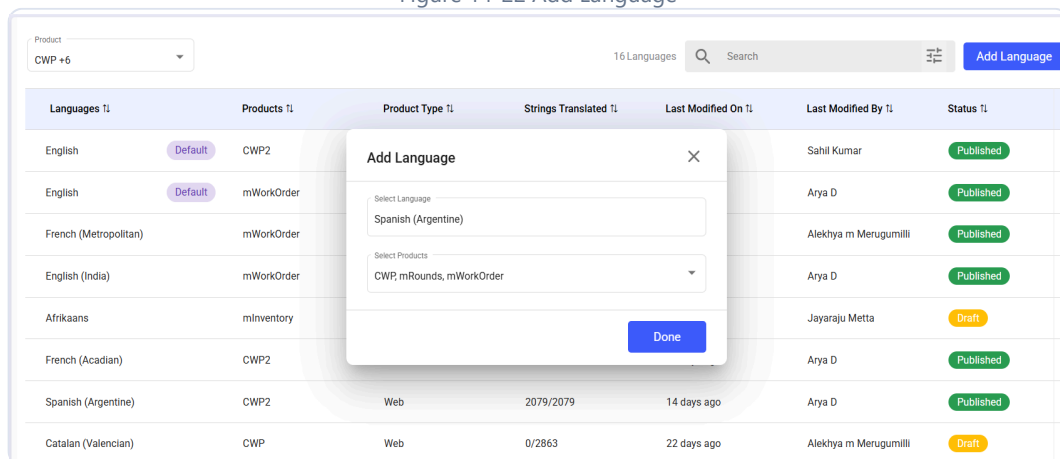
Product: CWP +6 16 Languages Search

**Add Language** ...

| Languages T1          | Products T1 | Product Type T1 | Strings Translated T1 | Last Modified On T1 | Last Modified By T1      | Status T1 | Actions |
|-----------------------|-------------|-----------------|-----------------------|---------------------|--------------------------|-----------|---------|
| English               | CWP2        | Web             | 2096/2096             | Yesterday           | Sahil Kumar              | Published | ...     |
| English               | mWorkOrder  | Mobile          | 1145/1145             | 7 days ago          | Arya D                   | Published | ...     |
| French (Metropolitan) | mWorkOrder  | Mobile          | 1145/1145             | 8 days ago          | Alekhyia m Merugumilli   | Published | ...     |
| English (India)       | mWorkOrder  | Mobile          | 1145/1145             | 8 days ago          | Arya D                   | Published | ...     |
| Afrikaans             | mInventory  | Mobile          | 0/380                 | 12 days ago         | Jayaraju Metta           | Draft     | ...     |
| French (Acadian)      | CWP2        | Web             | 2079/2079             | 14 days ago         | Arya D                   | Published | ...     |
| Spanish (Argentine)   | CWP2        | Web             | 2079/2079             | 14 days ago         | Arya D                   | Published | ...     |
| Catalan (Valencian)   | CWP         | Web             | 0/2863                | 22 days ago         | Alekhyia m Merugumilli   | Draft     | ...     |
| Albanian (Gheg)       | mAssetTag   | Mobile          | 0/2965                | A month ago         | Alekhyia supe supervisor | Draft     | ...     |

3. In the **Add Language** window, select the **Language** and applicable **Products**.

Figure 14-22 Add Language



Product: CWP +6 16 Languages Search **Add Language**

| Languages T1          | Products T1 | Product Type T1 | Strings Translated T1 | Last Modified On T1 | Last Modified By T1    | Status T1 | A |
|-----------------------|-------------|-----------------|-----------------------|---------------------|------------------------|-----------|---|
| English               | CWP2        |                 |                       |                     | Sahil Kumar            | Published |   |
| English               | mWorkOrder  |                 |                       |                     | Arya D                 | Published |   |
| French (Metropolitan) | mWorkOrder  |                 |                       |                     | Alekhyia m Merugumilli | Published |   |
| English (India)       | mWorkOrder  |                 |                       |                     | Arya D                 | Published |   |
| Afrikaans             | mInventory  |                 |                       |                     | Jayaraju Metta         | Draft     |   |
| French (Acadian)      | CWP2        |                 |                       |                     | Arya D                 | Published |   |
| Spanish (Argentine)   | CWP2        | Web             | 2079/2079             | 14 days ago         | Arya D                 | Published |   |
| Catalan (Valencian)   | CWP         | Web             | 0/2863                | 22 days ago         | Alekhyia m Merugumilli | Draft     |   |

**Add Language**

Select Language: Spanish (Argentine)

Select Products: CWP, mRounds, mWorkOrder

**Done**

4. Click **Done**.

The newly created language is displayed in the list.

5. Click the **More** icon and select **Edit**.

You can view the total translated string count for that product in its released version.

6. Translate all the strings for the selected language.

Figure 14-23 Translate Strings

French (Acadian) - CWP2 (Web)

Search by Field / Default / Language Names

Publish

| Field Name       | English (Default)  | French (Acadian) - draft         | French (Acadian) - published     |
|------------------|--------------------|----------------------------------|----------------------------------|
| searchWorkOrders | Search Work Orders | Rechercher des ordres de travail | Rechercher des ordres de travail |
| filter           | Filter             | Filtre                           | Filtre                           |
| showOverdue      | Show Overdue       | Afficher en retard               | Afficher en retard               |
| priority         | Priority           | Priorité                         | Priorité                         |
| kittingStatus    | Kitting Status     | État de préparation              | État de préparation              |
| apply            | Apply              | Appliquer                        | Appliquer                        |
| reset            | Reset              | Réinitialiser                    | Réinitialiser                    |
| dueToday         | Due Today          | Dû aujourd'hui                   | Dû aujourd'hui                   |
| dueThisWeek      | Due This Week      | Dû cette semaine                 | Dû cette semaine                 |
| dueThisMonth     | Due This Month     | Dû ce mois-ci                    | Dû ce mois-ci                    |
| Custom           | Custom             | Personnalisé                     | Personnalisé                     |

2079/2079 Strings Translated

100%

Show Empty Strings

7. Click **More** icon on the top right.

- Select **Clear All Strings** to clear all strings at once.
- Select **Refresh AI Translations** to use AI suggestions and clear them if needed.



**Note:**

Select the **Show Empty Strings** toggle at the bottom to quickly view the empty strings.

8. Once all the strings are translated, click **Publish**.

In the Localization screen, you can also,

- Select the **Product** drop-down to view All Products or individual products (e.g., CWP Web, iMaintenance Mobile, etc.) By default, the filter is applied to 'All Products', showing all languages across all products.
- Click on the Sort icon next to each column header to sort alphabetically, numerically, or by date.
- View the number of languages currently listed in the table (e.g., "18 Languages") at the top.
- Use the **Search** bar at the top right to quickly find a specific language or product.
- Use the **Filter** icon to filter the list based on Last Modified On or Last Modified By.
- Click **Add Language** and select **Upload Excel** to upload translations via Excel templates.
- Click the More icon and select **Download Excel Template** to download the template.

# 15. Configure Risk Evaluation with the Risk Matrix

---

The **Risk Matrix** is a powerful configuration tool that lets you define how risks are calculated and prioritized based on incident data. It supports consistent and objective decision-making across inspections, observations, and safety reporting.

Earlier: In many maintenance and safety programs I've seen, risk assessments were either one-size-fits-all or stuck in rigid templates. Teams had to rely on paper forms or inflexible tools where updating risk criteria—like likelihood or severity—meant IT involvement or a long wait for customization.

The result?

Risk evaluations that didn't reflect real-world changes or site-specific conditions. Worse, teams often skipped the process altogether because it felt disconnected from their actual workflows.

This led to two major problems:

- Outdated or irrelevant risk profiles – creating blind spots in hazard identification.
- Low user adoption – because the tools didn't match how frontline teams actually work.

Now, configuring a Risk Assessment Matrix is completely no-code and flexible. With our platform, EHS managers or planners can tailor the matrix—severity, likelihood, risk levels, color coding—to match company policies or evolving field realities, all without a developer. You can update parameters instantly, deploy them across teams, and ensure everyone is using the latest risk model—whether they're on-site or remote.

As an outcome - Smarter risk decisions, higher compliance, and a safety culture that adapts as fast as your operations do."

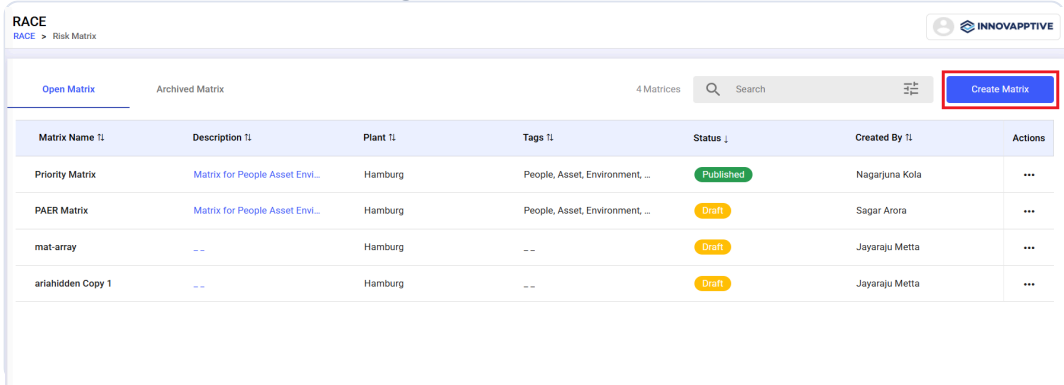
## 15.1. Create a Risk Matrix

---

To create a risk matrix:

1. Navigate to **RACE** and select **Risk Matrix**.
2. Click **Create Matrix**.

Figure 15-1 Create Risk Matrix



3. In the **Risk Matrix Details** screen, enter Matrix Metadata:

- Matrix Name

◦ Matrix Description

◦ Plant

◦ Category (Issue or Work Order)

◦ Type

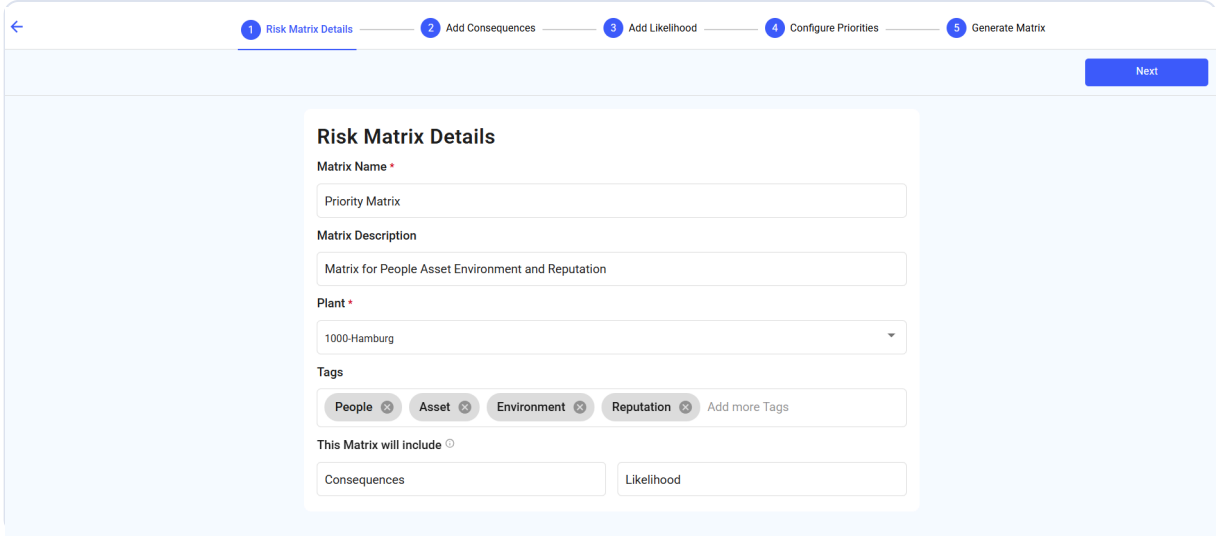
◦ Prioritization Profile

◦ Tags

◦ Define matrix components (e.g., Consequences, Likelihood)

◦ Click **Next**.

Figure 15-2 Risk Matrix Details



4. In the **Add Consequences** screen, add consequences,
  - Click the **+ Add Consequences** button at the right-side.
  - Select the relevant color in the **Color** column.
  - Define up to 5 consequence categories (e.g., People, Assets, Environment).
    - Add an evaluation question for each category.
    - Define severity levels (0–5) with:
      - A label
      - A scenario
      - A description
  - You can add or remove levels as needed.
  - Click **Next**.

Figure 15-3 Add Consequences

←

✓ Risk Matrix Details
 2 Add Consequences
 3 Add Likelihood
 4 Configure Priorities
 5 Generate Matrix

Previous
Next

| Severity |       | Consequences On People                                                          |                                | Consequences On Assets                                   |                              | Consequences On Likelihood          |
|----------|-------|---------------------------------------------------------------------------------|--------------------------------|----------------------------------------------------------|------------------------------|-------------------------------------|
|          |       | What is the potential impact on people in the event of this risk materializing? |                                | What is the potential impact on assets due to this risk? |                              | What is the potential environmental |
| Level    | Color | Scenario                                                                        | Description:                   | Scenario                                                 | Description:                 | Scenario                            |
| 0        | ●     | Catastrophic                                                                    | More than 3 fatalities or perr | Catastrophic                                             | Complete destruction or loss | Catastrophic                        |
| 1        | ●     | Major                                                                           | 1-3 fatalities or permanent di | Major                                                    | Severe damage requiring sigr | Moderate                            |
| 2        | ●     | Moderate                                                                        | Serious injuries requiring hos | Moderate                                                 | Damage causing limited dow   | Minor                               |
| 3        | ●     | Low                                                                             | No significant injuries; minor | Low                                                      | Minimal impact; repair costs | Negligible                          |
|          |       |                                                                                 |                                |                                                          |                              |                                     |

+ Add level (Max 7)

5. In the **Add Likelihood** screen, add Likelihood.

- Click **+ Add Case** at the bottom.
- Select the relevant color in the **Color** column.
- Define scenario in the **Likelihood of occurrence** column.
- Add a description in the **Description** field.



**Note:**

You can add maximum 7 cases.

- Click **Next**.

Figure 15-4 Add Likelihood

| Likelihood                                     |       |                          |                                 |
|------------------------------------------------|-------|--------------------------|---------------------------------|
| What is the likelihood of this risk occurring? |       |                          |                                 |
| Case                                           | Color | Likelihood of occurrence | Description:                    |
| A                                              |       | Almost Certain           | Likely to occur within 3 months |
| B                                              |       | Likely                   | Likely to occur within 3 months |
| C                                              |       | Possible                 | Might happen within the next    |
| D                                              |       | Negligible               | Likely to occur within 3 months |

+ Add Case (Max 7)

6. In the **Configure Priorities** screen, configure Priorities.

- Click the **+ Add Results** button at the bottom.
- Assign priorities (0, 1, 2...) based on consequence and likelihood combinations:
  - Name the **risk results**.
  - Select start date and end date.
  - Set **response timeframes** (e.g., 1 Day, 2 Weeks).
  - Map risk level values to ABC indicators per plant, issue or work order (e.g., High risk level can be mapped to both A and B classes).
  - Rank results from highest to lowest if needed.
- Click **Next**.

Figure 15-5 Configure Priorities

← Back to List

✓ Risk Matrix Details
✓ Add Consequences
✓ Add Likelihood
4 Configure Priorities
5 Generate Matrix

Previous
Next

Configure Matrix

Rank Priorities and Risk Result from Highest to Lowest ☐

| Priority | Color | Risk Result | Start Date   | End Date     | Complete Within | ABC Indicator |
|----------|-------|-------------|--------------|--------------|-----------------|---------------|
| 1 ▼      | ●     | Very High   | 1 ▼   Day ▼  | 1 ▼   Day ▼  | 2 ▼   H ▼       | 1 ▼           |
| 2 ▼      | ●     | High        | 2 ▼   Days ▼ | 2 ▼   Days ▼ | 2 ▼   Days ▼    | 2 ▼           |
| 3 ▼      | ●     | Medium      | 4 ▼   Days ▼ | 5 ▼   Days ▼ | 1 ▼   Week ▼    | 3 ▼           |

+ Add Results (Max 20)

7. In the **Generate Matrix** screen, generate the matrix:
- Review the color-coded matrix.
  - Each cell represents a risk level (e.g., Very High, Medium).
  - Click on the cell to change the risk level.
  - Click **Preview** to view risk matrix in its final form.

Figure 15-6 Matrix Preview

Preview Matrix

Matrix Name

Priority Matrix

People

What is the potential impact on people in the event of this risk materializing?

Catastrophic

Major

Moderate

Low

What is the likelihood of this risk occurring?

Almost Certain

Likely

Possible

Negligible

Assets

What is the potential impact on assets due to this risk?

- Click **Publish**.

Figure 15-7 Generate Matrix

Risk Matrix Details

Add Consequences

Add Likelihood

Configure Priorities

5

Generate Matrix

Preview

Previous

Publish

| Priority Matrix |              |              |                |           |            |            |
|-----------------|--------------|--------------|----------------|-----------|------------|------------|
| Consequences    |              |              | Likelihood     |           |            |            |
| People          | Assets       | Likelihood   | Almost Certain | Likely    | Possible   | Negligible |
| Catastrophic    | Catastrophic | Catastrophic | Very High      | Very High | High       | Medium     |
| Major           | Major        | Moderate     | Very High      | High      | Medium     | High       |
| Moderate        | Moderate     | Minor        | High           | Medium    | High       | Negligible |
| Low             | Low          | Negligible   | Medium         | Medium    | Negligible | Negligible |

The matrix is now available for use in incident reporting or form configurations.

Use **More** icon to Edit, Copy, Preview, or Archive a matrix.



# 16. Customize Platform Settings

---

The **Settings** module provides administrators with the tools to manage platform-wide preferences that directly affect the iMaintenance mobile application. These settings include storage behavior, theme configurations, and sync options that enhance user experience and app performance.

This chapter has the following topics:

- [Manage Storage & Sync Settings \(on page 113\)](#)
- [Apply Theme Configurations \(on page 117\)](#)
- [Define Mobile Data Sync Preferences \(on page 114\)](#)

## 16.1. Manage Storage & Sync Settings

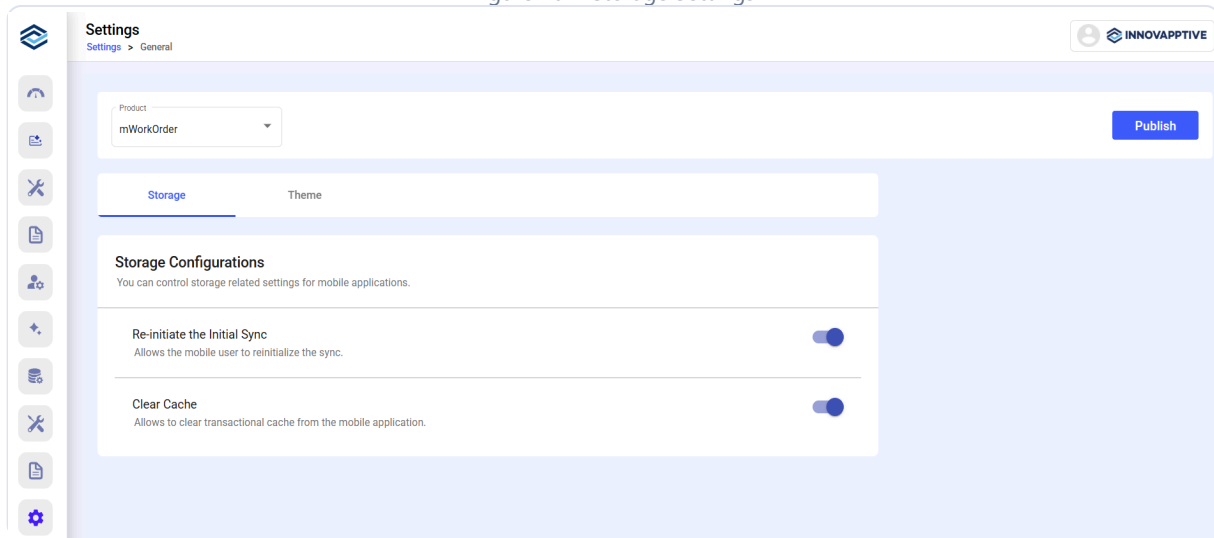
---

The **Storage** tab under **General** Settings allows admins to control how the mobile app handles data, including cache management and full sync initiation.

To manage storage and sync settings:

1. Navigate to **Settings** and click the **Storage** tab.
2. Select the **Product** (e.g., iMaintenance).
3. Enable or disable the storage related settings and click **Publish**.

Figure 16-1 Storage Settings



It has two primary options:

| Setting                         | Description                                                                                                                         |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| <b>Re-initiate Initial Sync</b> | Enables mobile users to trigger a full sync with backend systems, useful when resolving sync issues or applying new configurations. |
| <b>Clear Cache</b>              | Adds a "Clear Cache" button in the mobile app, allowing users to delete local data (junk/temporary files) to improve performance.   |

Once enabled and published the settings, they are applied to the selected product (e.g., iMaintenance) within the mobile application.

## 16.2. Define Mobile Data Sync Preferences

This feature lets you optimize how data is synchronized to mobile devices—minimizing sync times and improving app performance. Preferences can be set at **tenant**, **plant**, and **role** levels.

To define mobile data sync preferences:

1. Expand **Settings** and click **Mobile Data Preferences**.

2. Select the **Product** (e.g., iMaintenance).

The screen appears with two tabs:

| Tab                | Purpose                                                                             |
|--------------------|-------------------------------------------------------------------------------------|
| Global Data        | Define default data fields for each plant (e.g., Maintenance Plant, Planning Plant) |
| Transactional Data | Define sync filters for Work Orders and Issues based on user roles                  |

In this screen, you can,

- Rename or remove fields
- Add new fields
- Reorder fields
- Configure sync durations per role

Example: Supervisors may sync 7 days of data, while Technicians sync 3.

Figure 16-2 Global Data

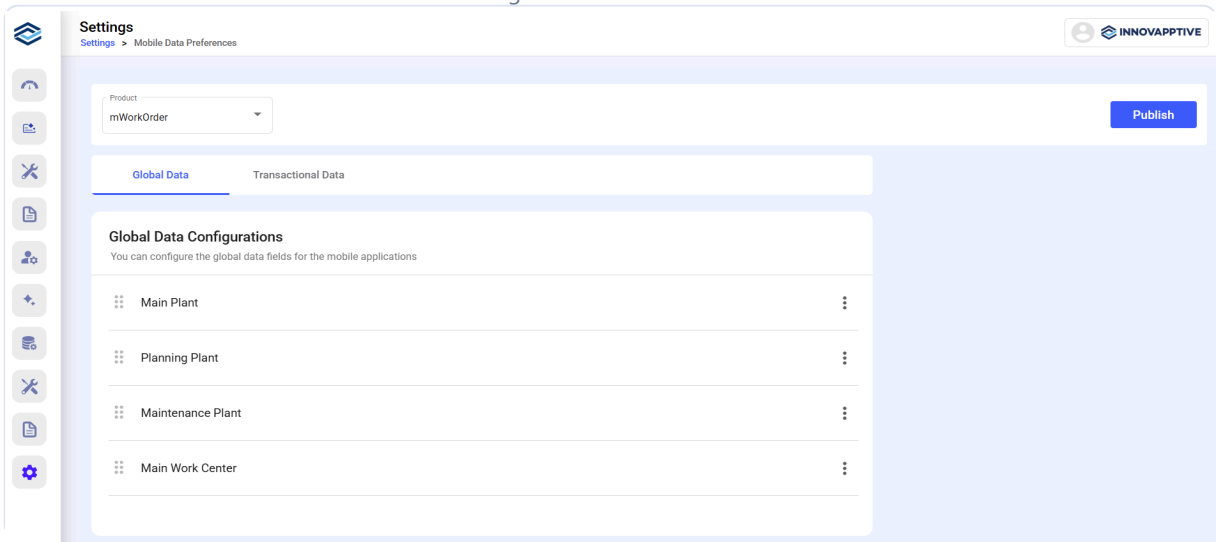
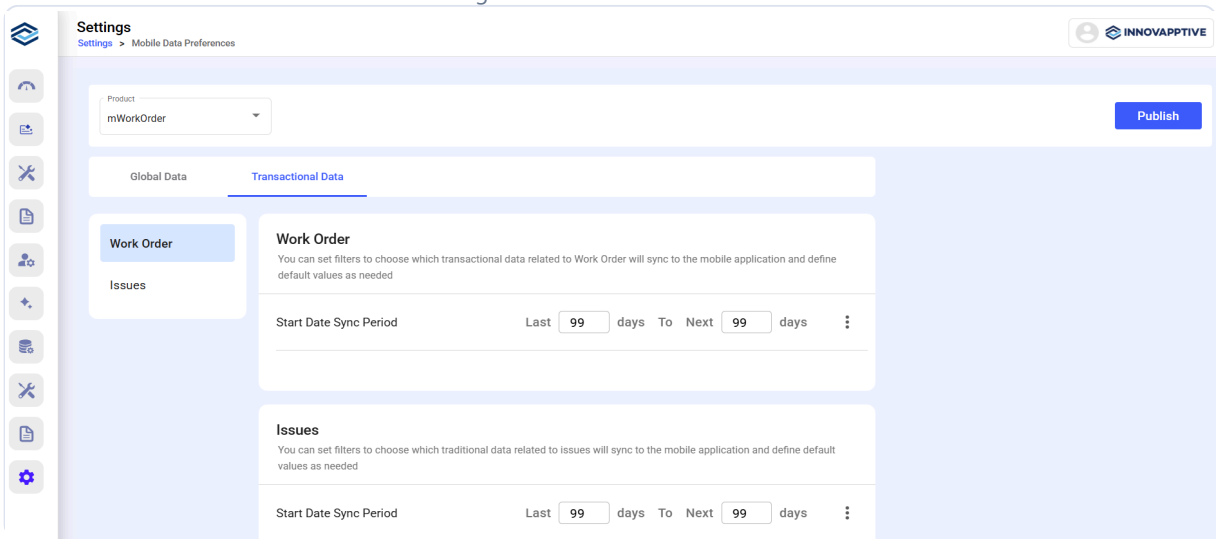


Figure 16-3 Transactional Data



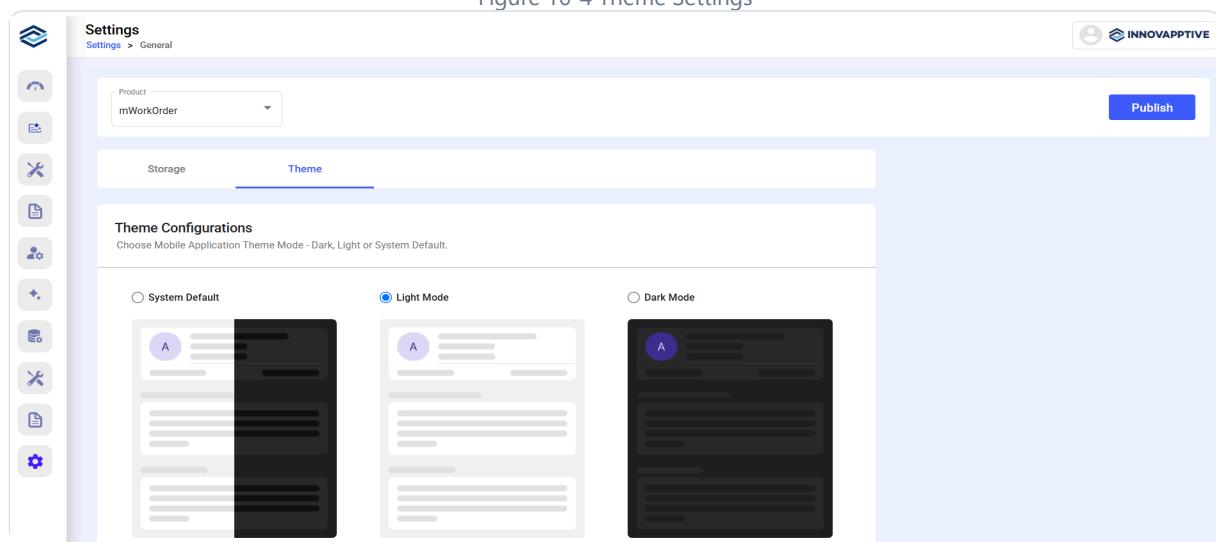
## 16.3. Apply Theme Configurations

Admins can customize the **visual appearance** of the iMaintenance mobile app using predefined themes to match user environments or company branding.

To apply theme configurations:

1. Navigate to **Settings** and click the **Theme** tab.
2. Select the **Product** (e.g., iMaintenance).
3. Choose a theme and click **Publish**.

Figure 16-4 Theme Settings



You can choose from the following mobile theme modes:

| Mode                  | Description                                                                     |
|-----------------------|---------------------------------------------------------------------------------|
| <b>System Default</b> | Uses the theme based on the user's device setting (light/dark mode)             |
| <b>Light Mode</b>     | Clean, bright interface with dark text—ideal for daylight use                   |
| <b>Dark Mode</b>      | Low-light UI for night shifts or dim environments (e.g., mining, manufacturing) |

Theme preferences apply globally for that product once published.

# 17. Set Up Notifications

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The **Notification Engine** gives administrators control over system-generated alerts, helping teams stay informed about workflow events without being overwhelmed. It's integrated with the iMaintenance mobile app, enabling flexible communication across devices.

## 17.1. Understand the Notification System

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The notification system is built to support automated communication based on user actions and workflow milestones. It uses **third-party services for email delivery** and is governed by built-in templates and logic.

**Key components:**

| Component  | Description                                                     |
|------------|-----------------------------------------------------------------|
| Recipients | Defines who gets notified (e.g., assignees, supervisors)        |
| Timing     | When notifications are triggered (e.g., assignment, completion) |
| Content    | Predefined messages that communicate what happened              |
| Type       | The nature of the event (e.g., task assigned, issue created)    |

These controls ensure that users receive timely alerts relevant to their role—improving visibility without unnecessary noise.

# 18. Build Dashboards and Reports

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The platform offers robust tools to visualize, track, and analyze operational data through customizable dashboards and reports. These tools help supervisors and technicians gain real-time insights into asset health, work order status, performance metrics, and more.

This section has the following topics:

- [View the Asset360 Dashboard \(on page 119\)](#)
- [Create Dashboards \(on page 120\)](#)
- [Add & Configure Widgets \(on page 121\)](#)
- [Create Custom Reports \(on page 123\)](#)
- [Archive & Share Dashboards \(on page 125\)](#)

## 18.1. View the Asset360 Dashboard

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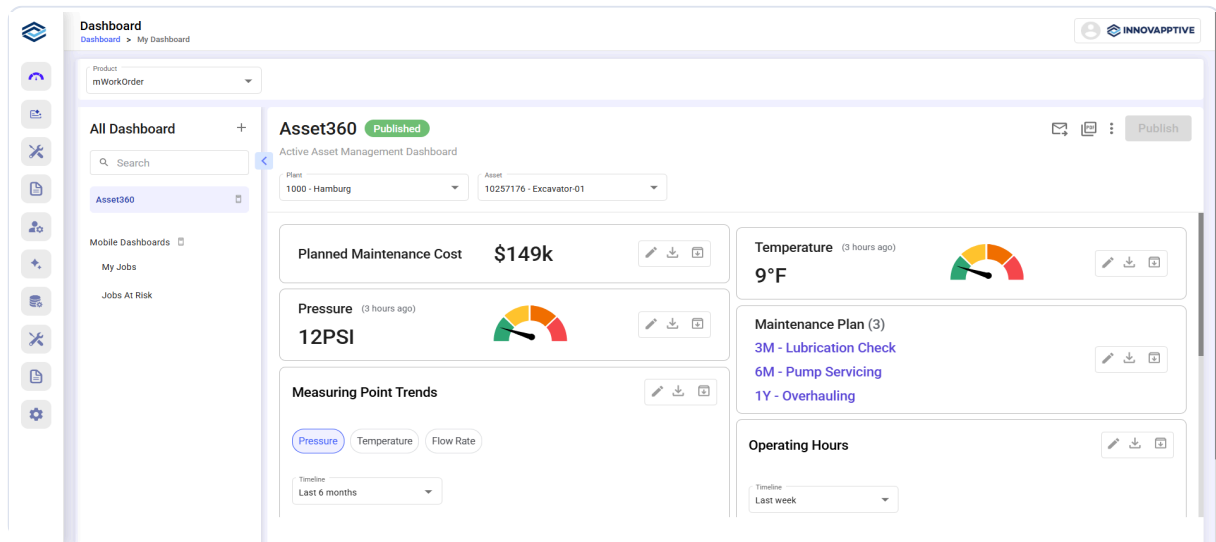
The Asset360 Dashboard provides a 360° view of real-time overview of work center and asset performance, maintenance costs, resource utilization, work order status, workforce efficiency and historical data for assigned plants. It helps supervisors make informed decisions by tracking KPIs across various operational dimensions.

For example, Earlier, the supervisor worked in silos with delayed data, manual KPI tracking, and reactive decisions. Cost visibility was limited, and ensuring compliance demanded significant manual effort.

With Asset360 Dashboard, supervisors get a real-time, 360° view of their work centers—spotting under-performing equipment or technicians. Powered by live data, AI-driven insights, and role-based dashboards, it drives proactive, efficient, and audit-ready maintenance operations and reduces overall maintenance costs.

### Key actions available:

- **Selecting Plants and Assets** to track their performance.
- **Viewing key metrics** such as:
  - Actual Maintenance Cost
  - Planned Maintenance Cost
  - Equipment Downtime
  - Work orders with System Status, User Status, and Priority
  - Issues with System Status, User Status, and Priority
  - Mean Time To Repair
- **Customizing widgets** (only title and color) and publishing updates.
- **Downloading widget data** for offline use.
- **Archiving widgets** that are no longer needed.
- **Sharing dashboards via email** using the Mail icon.
- **Exporting dashboards** as PDFs.
- **Searching dashboards** using the search bar.



#### Note:

You can modify only the title and color of the widgets and click **Publish** on the top right. The changes made to the Asset360 Dashboard are reflected in the iMaintenance mobile app.

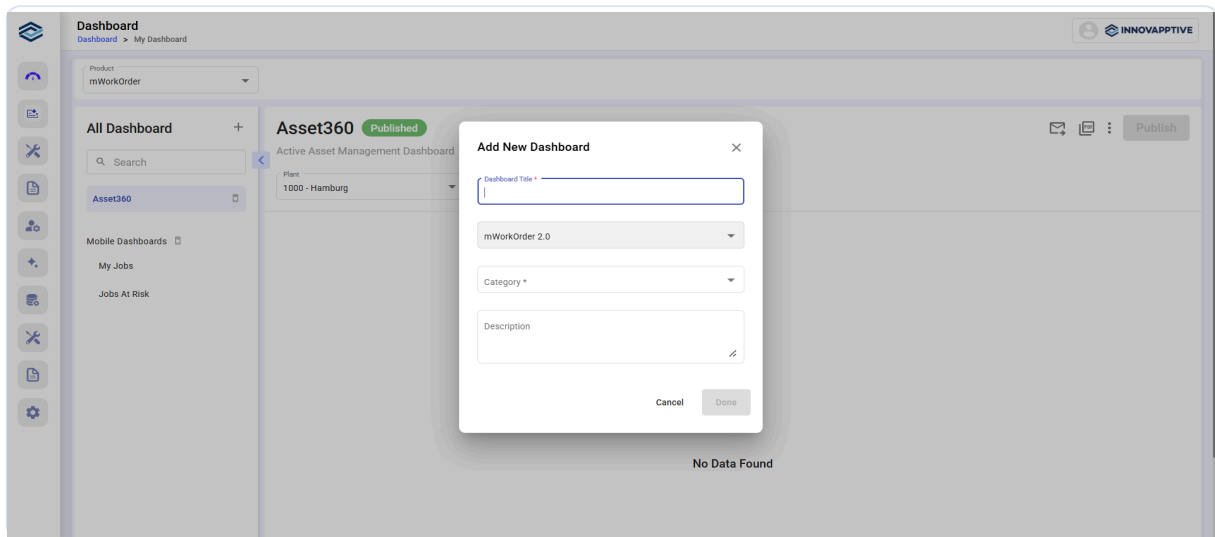
## 18.2. Create Dashboards

You can create custom dashboards tailored to operational needs, giving different user personas visibility into the most relevant data.

To create a dashboard:



1. Navigate to **Dashboard > My Dashboard**.
2. Click the **Add (+)** icon next to **All Dashboards** on the left panel.
3. In the **Add New Dashboard** window:
  - Enter a title.
  - Select a product (e.g., *iMaintenance*).
  - Choose a category (e.g., *Jobs at Risk*, *My Jobs*).
  - Add a description.



4. Click **Done** to create the dashboard.

You can now begin adding widgets to the dashboard.

**Tip:** Fields marked with an asterisk (\*) are mandatory and must be filled out to create a dashboard.

## 18.3. Add and Configure Widgets

Widgets visually represent operational data on your dashboard using charts, tables, or KPIs.

To add a widget:

1. Navigate to **Dashboard > My Dashboard**.
2. Navigate to the **Mobile Dashboards** section, open your custom dashboard, and click **Add Widget**.
3. Choose from:
  - **Pre-built Widgets:** Ready-made visualizations that can be modified.
  - **Build Your Own Widget:** Custom-built using your selected data fields.

#### If using Pre-built Widgets:

- Select the module (e.g., *iMaintenance*.)
- Choose the object (e.g., *Work Order, Issues*.)
- Select data fields and click **Add to Dashboard**.
- (Optional) Modify the fields as needed.

#### If building your own widget:

- Select Module and Object (e.g., Work Orders, Operations).
- Enter widget title and description.
- Set visualization options:
  - Widget size: Small, Medium, Large.
  - Chart types: Bar, Pie, Donut, Line, Column, Table, etc.
  - Legend colors for visual clarity.

- Configure data:
  - **Data Settings:** Define how data is sliced (e.g., by Priority).
  - **Data Filter:** Apply filters like Priority, Assigned To Me, Created By Me.
  - Preview the widget layout.

4. Click **Add** to save the widget.

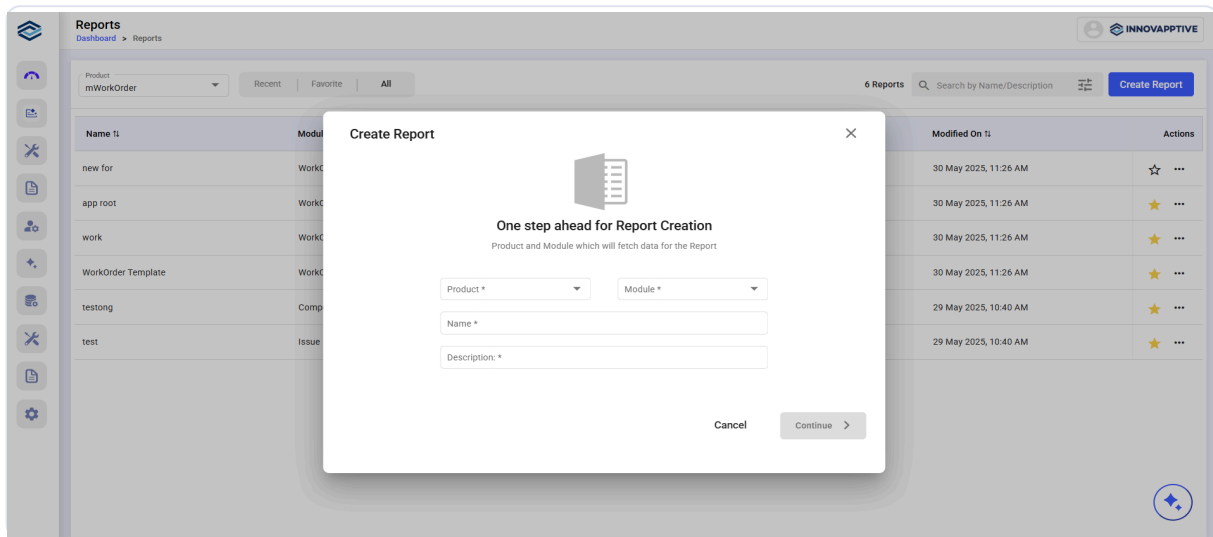
## 18.4. Create Custom Reports

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Reports allow you to generate detailed insights using business objects such as Work Orders, Components, Operations, and Issues.

To create a report:

1. Navigate to **Dashboard > Reports**.
2. Click **Create Report**.
3. In the **Create Report** window:
  - Select the product (e.g., *iMaintenance*).
  - Select the module (e.g., *Operations*).
  - Enter report name and description.
  - Click **Continue**.



#### 4. In the **Add Report** screen:

- Edit the report name/description if needed.
- Use **Group by Fields** (e.g., Plant ID).
- Select **Columns** to display the report.
- Click **Save**.

The screenshot displays the 'Reports' configuration interface. On the left, a sidebar contains navigation icons. The main panel is titled 'Reports' and shows a breadcrumb 'Dashboard > Reports > Add Report'. Below this, there are input fields for 'Report Name' (Operations Report) and 'Report Description' (Operations Report). A 'Filter' panel on the left allows grouping by 'Priority' and selecting columns: Priority, ERP WorkOrder Id, Description, Plant Id, Maintenance Plant Id, Name, and WorkOrder Status. The main table displays 41k records with columns: Priority, ERP WorkOrder Id, Description, Plant Id, Maintenance Plant Id, and Name. The table is filtered by 'Low' priority. The table contains 7 rows of data, including entries for 'Pump Malfunction Issue', 'No Wo Comp Check', 'Oil Leakage Detection', 'Pump Issue Reported', and 'Pipe Breakage - Delta'.

You can also,

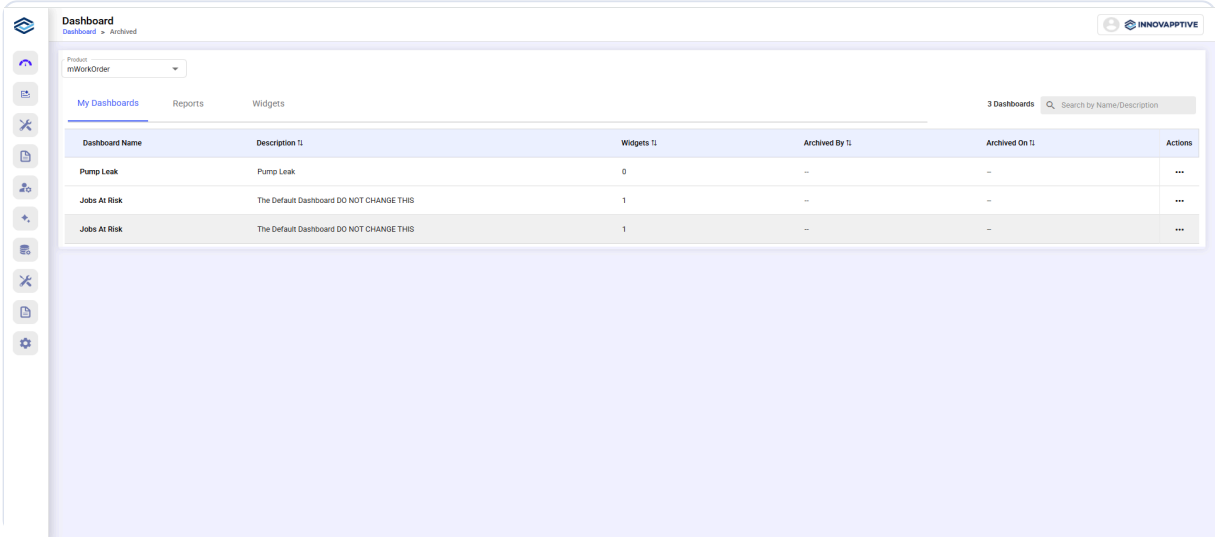
- Mark as Favorite.
- Search the columns.
- Filter by Date, Plant, Shift, Location, Equipment ID, etc.
- Use operators like *equals*, *contains*, *greater than*, etc.
- Download reports in CSV or Excel format.
- Use **Undo**, **Redo**, **Sort**, or **More** to hide/move/stick/group columns.

## 18.5. Archive and Share Dashboards

Archived dashboards, widgets, and reports help you de-clutter your workspace without losing valuable data.

To manage archived items:

1. Navigate to **Dashboard > Archive**.



2. Use the tabs to view:

- **Dashboards** (includes name, description, widget count, archived date/by).
- **Reports** (includes module, description, modified by/on).
- **Widgets** (includes source, dashboard, archived by/on).

3. Use the search bar and column sorting to locate items.

4. Use the **Actions** menu to restore or delete items.