

iMaintenance User Guide for Supervisors

Connected Worker Solutions



Title and Copyright

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

User Guide for **iMaintenance**, part of the iCWP platform.

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Preface

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

Intended Audience

This user guide is for plant maintenance supervisors in your organization. The user guide familiarizes supervisors with features and functionality of the iMaintenance application.

Document Conventions

Table 0-1 Conventions followed in the document

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

Related Products & Solutions

- [Work Order Management](#)
- [Inventory and Warehouse Management](#)
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1. Introduction to iMaintenance

Use this guide to prepare for the shift, assess reported issues, plan and assign work, monitor execution, and close completed work in iMaintenance.

iMaintenance supports the supervisor journey from shift preparation through work-order closure.

1. Understand the application, the supervisor role, and the current release.
2. Sign in, prepare synchronized data, and assess reported issues.
3. Create and assign work orders with the required operations and prerequisites.
4. Monitor execution, resolve blockers, review completed records, and close the work.

After reviewing this orientation, continue to [Get Started with the Application \(on page 11\)](#).

1.1. Overview of iMaintenance Application

iMaintenance is a mobile-first work order management application for Supervisors to create, assign, and monitor maintenance work orders.

Key Features

Efficient Work Order Management

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

Intelligent Issue Reporting

- Users can report equipment conditions promptly so they can be assessed and followed up.
- AI-powered analysis suggests relevant equipment and functional location based on historical data, keywords, and images.
- Supervisors are notified and can take corrective action.

AI-Powered Assistance (SIA)

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

Offline Functionality and Synchronization

- Users can continue working without an internet connection.
- Offline entries, including timesheets and work orders, sync automatically when back online.
- Reduces the risk of data loss during network disruptions.

Timesheet Tracking and Approval

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

1.2. iMaintenance Benefits for Supervisors

See how iMaintenance helps supervisors assess issues, plan work, coordinate technicians, monitor progress, and complete maintenance records.

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

- **Work Order Management:** Create, assign, and track work orders, ensuring the right tasks reach the right technicians.
- **Comprehensive Insights:** Access detailed equipment history with Asset 360.
- **Progress Monitoring:** Gain visibility into work status, issue resolution, and technician performance using the Home screen (Dashboard).
- **Emergency Handling:** Quickly initiate and escalate urgent repairs.
- **Safety Readiness:** Verify that required permits and safety records are available before work execution.
- **Work Order Adjustments:** Modify assignments, update priorities, and reassign tasks as needed.

1.3. What’s New for Supervisors in iMaintenance

Review the iMaintenance features introduced in release 2608 for supervisors and planners.

New Features and Enhancements in Release 2608

Table 1-1 New Features and Enhancements in Release 2608

Select Cost Center for Work Orders

Select a Cost Center for a Work Order based on the selected Equipment or Functional Location, or choose a valid Cost Center manually when no value is available.

For more information, see [Review AI-Suggested Details \(on page 42\)](#) and [Select Equipment and Functional Location \(on page 44\)](#).

Plan and Manage Sub-Operations Independently

Add, edit, assign, and manage Sub-Operations independently from the parent Operation, with execution and confirmation details maintained at the Sub-Operation level.

For more information, see [Manage Sub-Operation \(on page 53\)](#).

Table 1-1 New Features and Enhancements in Release 2608 (continued)

Change Application Language Select the preferred application language from User Preferences and view supported content, including dropdown values and dashboard information, in the selected language. For more information, see Choose Language (on page 94).
Track AI-Assisted Work Order and Issue Creation Track whether AI assistance is used during Work Order and Issue creation to measure AI-assisted creation alongside overall creation activity.

1.4. System Requirements

Review the supported mobile platforms, browsers, storage, and memory requirements for iMaintenance 2607.

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

System	Minimum Requirements
Compatible Form Factors	• iOS - Tablets and Phones • Android - Tablets and Phones
Compatible Device(s)	iOS Supported Versions: Latest iOS version (iOS 26) and two previous major versions. Example (as of iOS 26 being current): iOS 20, iOS 18. Android Supported Versions: Latest Android version (Android 15) and two previous major versions. Example (as of Android 15 being current): Android 15, Android 14.

System	Minimum Requirements
Compatible Browser(s)	iOS (Safari) Supported Versions: Latest version (iOS 26) and four previous versions of Safari.  Note: Based on the Safari version available with the corresponding iOS versions listed above. Windows 11 Supported on the latest and two previous major versions of the following browsers: • Google Chrome - Example (as of Chrome version 135): Chrome 134, 132, 133 • Microsoft Edge - Example (as of Edge version 135): Edge 135, 134, 133
Device Storage and Memory Requirement	All devices must have a minimum of 64GB of storage and 8GB of RAM to support online data processing effectively. A configuration of 64GB storage and 8GB RAM is recommended to ensure optimal performance, particularly when handling higher volumes of data, including document processing and offline storage capabilities. Actual performance may vary depending on the total volume of data being managed and the amount of available memory on the device.



Note:

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

2. Get Started with the Application

Sign in and learn the screens and controls you need before preparing and supervising maintenance work.

Start by signing in. Use the Dashboard and main screens to move from workload indicators to the related issues, work orders, operations, and alerts. Refer to the buttons and icons topic only when a control is unfamiliar.

After you can navigate the application, continue to [Prepare for Your Shift \(on page 26\)](#).

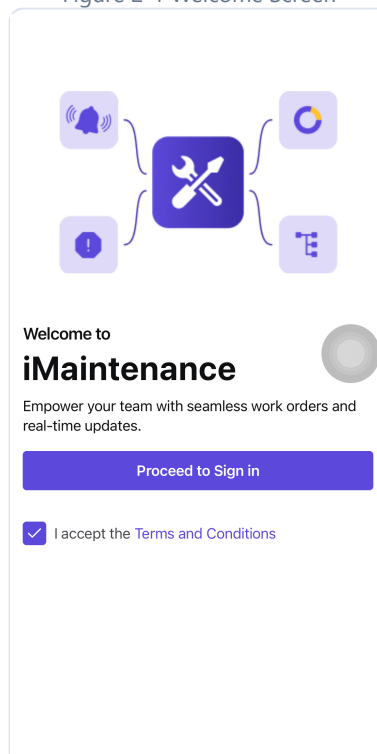
2.1. Log in to the iMaintenance Application

Log in to iMaintenance by entering your company domain, username, and password.

To log in to the application:

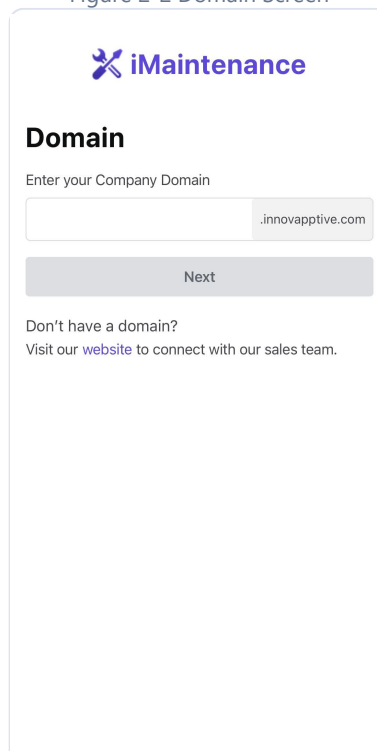
1. Open the application.
2. In the Welcome screen, accept **Terms and Conditions** and tap **Proceed to Sign in**.

Figure 2-1 Welcome Screen



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

Figure 2-2 Domain Screen



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

Figure 2-3 Sign In Screen

11:32

iMaintenance

Sign in

Email ID

Enter your Email ID

Password

Enter your Password

Sign in

[Forgot Password?](#) [Change Domain](#)

or

Sign in with Google

Sign in with Microsoft

Sign in with Okta

Sign in with Ping

Sign in with SAP IAS

Result

You are authenticated and the application begins the configured synchronization process.

On first use, create the device passcode and enable biometric access when available. Otherwise, continue to the Dashboard.

Next action

Next: On first use, create the device passcode. (on page 13)

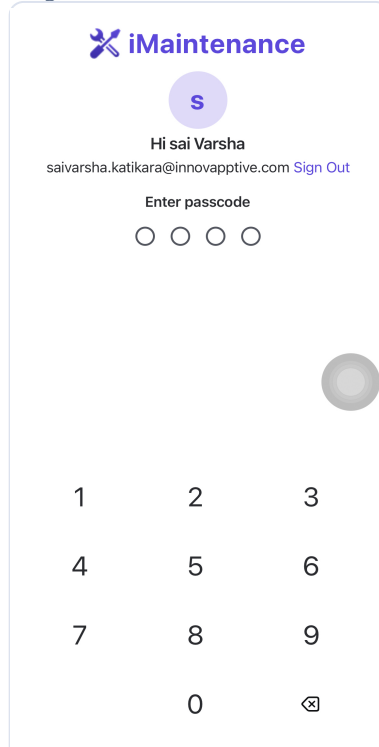
2.1.1. Create Passcode

The application prompts you to create a passcode on first login for faster sign-in on future visits.

To create a passcode:

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

Figure 2-4 Create Passcode Screen

**Note:**

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

Result

The passcode is created and can be used for subsequent access on the device.

Enable biometric access when available, or continue to the Dashboard.

Next action

Next: enable biometric access when it is available on the device. (on page 15)

2.1.2. Enable Biometric Access

Enable biometric access to log in to iMaintenance using your device's fingerprint or face recognition.

To enable biometric access:

1. In the Set Up Biometric Authentication screen, tap **Enable Biometrics**.
2. If your device supports fingerprint recognition, provide your fingerprint to enable fingerprint login.
3. If your device supports face recognition, scan your face to enable face login.

**Note:**

You can use username and password, passcode, fingerprint, or facial scan to log in, depending on which methods you set up.

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

Figure 2-5 Offline Sync

**Result**

Biometric access is enabled for subsequent sign-in on the device.

2.2. iMaintenance Dashboard and Main Screens

Use the Dashboard and main screens to move from workload and exceptions to the related work orders, operations, issues, and alerts.

The application consists of the following screens:

- [Home \(Dashboard\) \(on page 16\)](#)
- [Work Orders \(on page 20\)](#)
- [Issues \(on page 21\)](#)
- [Alerts \(on page 22\)](#)
- [More \(on page 22\)](#)

2.2.1. Home (Dashboard)

The Home (Dashboard) screen shows work order distribution, technician workload, and pending approvals in one place.

Supervisor Dashboard

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

- Work order distribution
- Technician workloads
- Pending approvals

This gives supervisors the ability to:

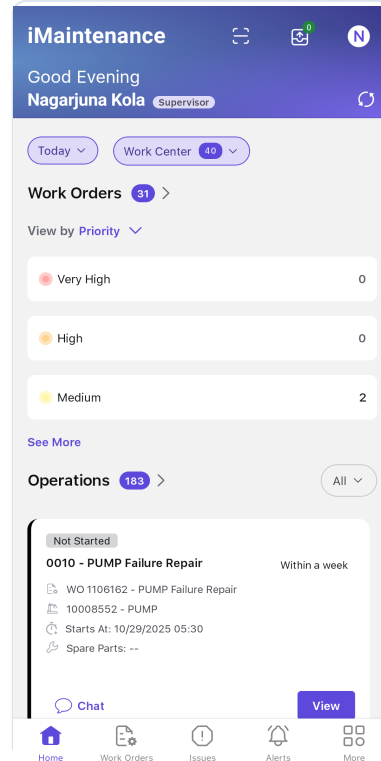
- View task allocation at a glance
- Track technician progress
- Quickly spot and address operational bottlenecks

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

For example: *if Reactor-7 exceeds 80 psi, an alert is displayed.*

The Supervisor Dashboard is divided into the following key sections:

Figure 2-6 Supervisor Dashboard

**Tip:**

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

- **Header**

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



icon lets you scan the asset from the Dashboard.

- The Outbox



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

- The Profile



icon lets you view the personal profile details.

- The Manual Sync



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

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

- **Work Orders**

- Select a category from the **View by** drop-down to view interactive widgets that help you quickly identify and prioritize pending tasks:
 - **Priority:** Displays work orders grouped by priority levels — **Very High, High, Medium,** and **Low.**
 - **Status:** Displays work orders grouped by their current status — **Created, Released, In Progress, Completed,** and **Closed.**
 - **Type:** Displays work orders grouped by their type — **Preventive WO, Corrective WO, Breakdown WO,** and **Emergency WO.**
- Tap any category to open a filtered list of the corresponding work orders.

- **Overdue Work Orders**

- This section displays three interactive widgets **Priority, Status,** and **Type** that are categorized into different groups along with the count.

- **Issues**

- This section displays following three interactive widgets:
 - **Priority:** Displays issue grouped by priority levels — **Very High, High, Medium,** and **Low.**
 - **Status:** Displays issues grouped by their current status — **Open, Released, In Progress, Completed,** and **Rejected.**
 - **Type:** Displays issues grouped by their type — **Corrective** and **Breakdown.**
- Tap any category to open a filtered list of the corresponding issues.

- **Scheduled Work Orders at Risk**

- Highlights work orders that are scheduled but at risk due to incomplete component kitting (status = *Kitting not done*).
- Each card displays:
 - Work Order ID and Title
 - Priority
 - Equipment ID and Name
 - Assigned Technician
 - Start Time
 - Pending Spare Parts
 - **Chat** and **Action** buttons

- Action options include:
 - **Reschedule:** Modify start and end dates
 - **Reassign:** Change the assigned technician
- You can apply filters (Today, Tomorrow, 3 Days) and browse via a horizontal carousel (4 cards by default).

• Pending Actions

- Displays widgets for three types of pending items:
 - **Technical Completion:** Work orders with status = *Completed*.
 - **Technician Assignment:** Work orders without an assigned operation.
 - **Timesheet Approval:** Timesheets with status = Submitted & Unapproved.
- Tapping a widget navigates the user to a filtered list view based on the selection.

• Live Status Overview

- Shows technician activity with the following columns:
 - **Planned Utilization:** The total planned work for the shift across all technicians.
 - **Shift Progress:** The total completed planned work for the shift, alongside today's operations progress (completed/total).
 - **Technician Name:** The technician name with planned hours.
 - **Operation:** The operation or job the technician is currently working on, with a clickable link to open the full work order details.
 - **Operation Status:** The status of the operation (In Progress, On Hold, etc.).
 - **Work Order:** The work order the technician is currently working on.
 - **Actions:** Tap the Chat icon to start a conversation with the technician.
 - **Show All:** Tap to view the status of all technicians.

• Issues Reported by Me

- Displays issue counts categorized as:
 - **Open**
 - **Released**
 - **In Progress**
 - **Completed**
 - **Rejected**
- Tap any category to view the corresponding filtered issue list.

• Quick Actions

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

**Note:**

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

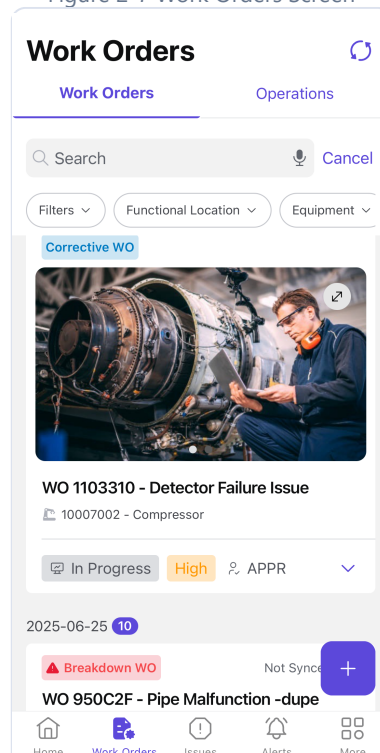
2.2.2. Work Orders

The Work Orders screen lists your created and assigned work orders and operations under separate tabs.

Work Orders

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

Figure 2-7 Work Orders Screen



On this screen, you can:

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

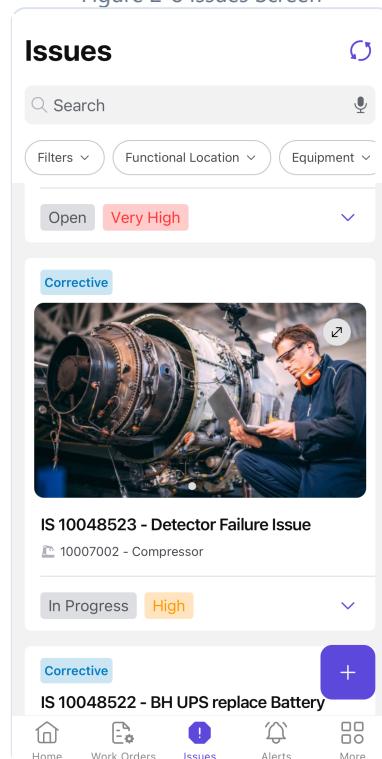
Operations

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

2.2.3. Issues

The Issues screen lists reported issues with details such as description, priority, plant, location, and status.

Figure 2-8 Issues Screen



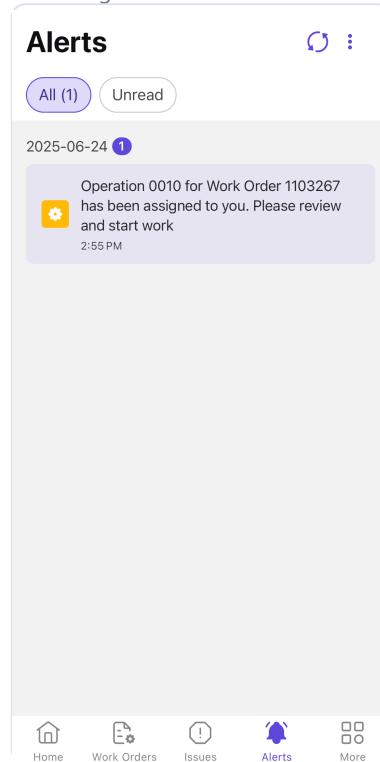
On this screen, you can:

- Report, track, and manage issues related to work orders.
- Filter issues by functional location, equipment, assignment, and other criteria.
- Document problems, add supporting details, and monitor progress.

2.2.4. Alerts

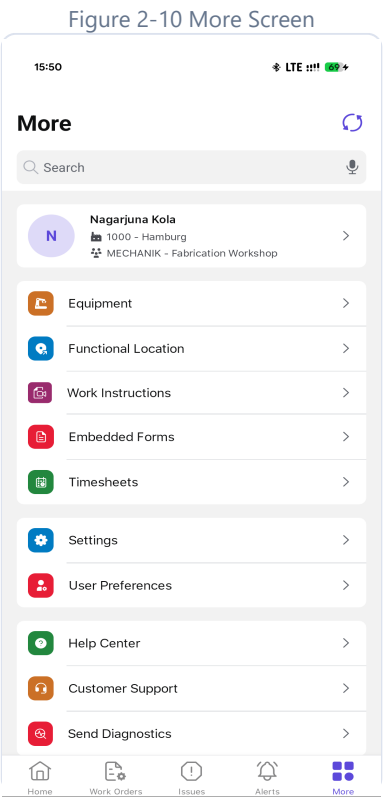
The Alerts screen shows notifications about task updates, deadlines, and high-priority items assigned to you.

Figure 2-9 Alerts Screen



2.2.5. More

The More screen provides access to your profile, app settings, and support resources.



On this screen, you can:

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

2.3. Buttons and Icons in Application

Use this reference when a procedure includes an unfamiliar iMaintenance button or icon.

Following are the buttons and icons available in the application:

Table 2-1 Buttons and Icons

Button/Icon	Name	Purpose
	Profile	View User Profile.
	Outbox	View pending or failed transactions.

Table 2-1 Buttons and Icons (continued)

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

Table 2-1 Buttons and Icons (continued)

Button/Icon	Name	Purpose
	Chat	Send messages, share files, and tag team members.

3. Access Work Orders and Issues Quickly with Smart Sync

Before the shift begins, set the synchronization scope, review notifications, find priority work, and confirm the required records are available.

Shift preparation follows this flow:

1. Set the plant and date range used for synchronization.
2. Run synchronization and review notifications for new or changed work.
3. Search or filter the records that need attention.
4. Confirm required records are available before entering a low-connectivity area.

Begin by setting the synchronization scope:

1. Navigate to the **More** screen and select **User Preferences**.
2. Under **Global Data**, choose your **Planning Plant** and **Maintenance Plant**, and review the displayed **Main Work Center**.
3. Under **Transactional Data**, enter the number of days for **Last** and **Next** to define how far back and ahead data should synchronize.



Note:

Data synchronizes only within the specified range from the current date.

4. Tap **Save**.

Figure 3-1 User Preferences

Result

The synchronization scope is saved. Run synchronization, then review notifications for new or changed work.

Next action

Next: review notifications for work that requires attention. (on page 27)

3.1. View Push Notifications

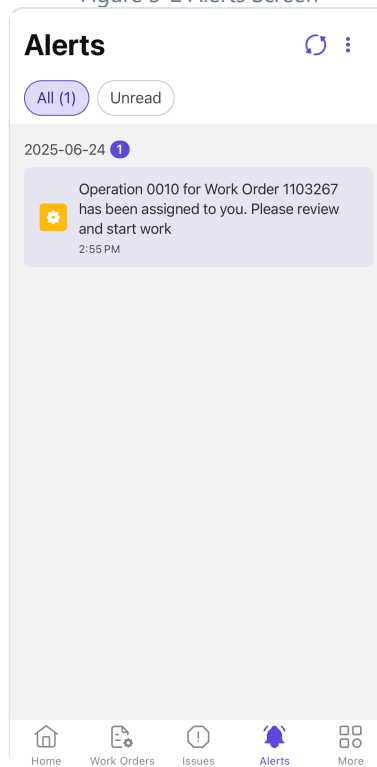
Push notifications alert you to assigned issues, task status changes, and updates from your team.

Check notifications as soon as they appear so you can act on time-sensitive updates.

To check notifications:

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

Figure 3-2 Alerts Screen



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

4. Tap the More  icon on the top-right corner and select **Mark all as Read** to mark as read.

5. Tap the More  icon on the top-right corner and select **Clear All** to clear the alerts.



Note:

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

Result

The related record opens from the notification. Continue with the issue, work order, operation, or conversation that requires attention.

3.2. Search and Filter Records

Search and filter work orders, issues, operations, functional locations, and equipment by specific criteria.

Use search when you know part of a record name, number, or description. Use filters when you need to narrow a larger list by status, priority, assignment, work center, functional location, or another available criterion.

Result

The list displays the matching records. Open the required record and continue with issue assessment, planning, execution, or monitoring.

Search Records

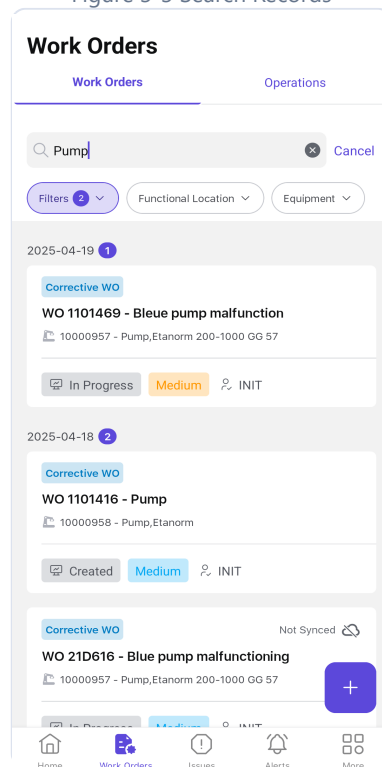
Search functionality helps you find specific information quickly.

To search records:

1. Navigate to the **Work Orders, Operations, or Issues** screen.

2. Enter the keyword in the Search  bar.

Figure 3-3 Search Records



The search results are displayed.

Result

The list displays only records matching the selected search, filter, and sort criteria.

Filter Records

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

To filter records:

1. Navigate to the **Work Orders, Issues, or Alerts** screen.
2. Tap **Filters** below the search bar.
3. In the **Filters** screen,
 - a. In the **Sort By** section, choose **Latest on Top** or **Oldest on Top** radio button.
 - b. In the **Status** section, select the checkboxes for relevant statuses, such as:
 - Open
 - Not Started
 - On-Hold
 - Partial Confirm
 - In Progress
 - Completed
 - c. In the **Priority** section, select the desired levels:
 - Very High
 - High
 - Medium
 - Low
 - d. In the **More Filters** section,
 - Tap on options such as Work Center, Functional Location, or Assigned to and select specific criteria.
4. Tap **Apply Filters** to update the records list with your selected filters.
5. (Optional) To save the selected filters for future use, tap **Save Selection** before exiting.
6. (Optional) To clear all selected filters, tap **Reset**.

Figure 3-4 Filter Records

Cancel Filters Reset

Sort By

☒ Latest on Top

☐ Oldest on Top

Status

☐ Created

☐ Released

☐ In Progress

☐ Completed

☐ Closed

Priority

☐ Extreme Risk

☐ High

☒ Medium

☐ Low

☐ Negligible

Show Only

☐ Breakdown

☐ Assigned to me

Save Selection Apply Filters

**Note:**

Tap **Cancel** to discard changes and return to the previous screen without applying any filters.

Result

The list displays records matching the selected filters.

3.3. Work Offline and Synchronize Data

Prepare required records for offline work, review pending activity, and resolve synchronization failures.

Prepare Before Going Offline

1. Confirm the correct plant, work center, and synchronization date range.
2. Run **Manual Sync**.
3. Confirm that required work orders, operations, forms, attachments, permits, JHAs, Work Instructions, and master data are available.
4. Download Work Instruction media separately when it is required offline.
5. Review the Outbox and resolve existing failures.

Work While Offline

Supported changes are stored locally and appear in the Outbox. AI services and other online-only capabilities are unavailable.

**Warning:**

Do not sign out, uninstall the application, clear application data, or delete a pending Outbox record while required unsynchronized work remains.

Synchronize Pending Work

1. Restore connectivity.
2. Run **Manual Sync**.
3. Review records that are Pending, Syncing, Failed, or Synchronized.
4. Open a failed record and review the validation or posting message.
5. Correct the underlying record and retry synchronization.
6. Escalate unresolved SAP, permission, or server errors without deleting the local record.

Understand Consolidated Outbox Records

A work order can appear as one consolidated Outbox record while its operations, components, forms, issues, or measurements are synchronized. The current activity shown in the Outbox indicates which part of the record is being processed.

After synchronization succeeds, return to the pending work record and continue the task. Resolve any item that remains in the Outbox before completing or closing the work.

4. Issue Decisions and Work Order Creation

Decide what to do with a reported issue and, where corrective work is needed, convert it into a work order.

Open each reported issue, review the available evidence, and choose the outcome that matches the maintenance need.

Situation	Action	Continue to
Immediate corrective work is required.	Create and release emergency work.	Create and Release an Emergency Work Order from an Issue (on page 35)
Corrective work requires planning.	Create a planned work order.	Create a Planned Work Order from an Issue (on page 38)
The observation is valid but needs no work order.	Mark the issue complete.	Mark an Issue Complete Without a Work Order (on page 34)
The issue is duplicate, incorrect, or non-impactful.	Reject it with a reason.	Reject a Non-Impactful Issue (on page 38)

Start with [Decide What to Do with an Issue \(on page 33\)](#). After completing a branch, return to the issue list and assess the next record or continue with the resulting work order.

4.1. Decide What to Do with an Issue

Review a reported issue to assess urgency and decide the correct next action.

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

1. Open the issue from the **Issues** screen.
2. Review the details under Attachments, Items, Causes, Activities, and Tasks.
3. Choose the action that matches the situation:

Table 4-1 Issue Decision Table

Situation	Action
Valid issue requiring immediate work	Create, assign, and release emergency work — see Create and Release an Emergency Work Order from an Issue (on page 35)
Valid issue requiring planning	Create a planned work order — see Create a Planned Work Order from an Issue (on page 38)
Valid observation requiring no work order	Mark complete with comments — see Mark an Issue Complete Without a Work Order (on page 34)
Duplicate, incorrect, or non-impactful issue	Reject with a reason — see Reject a Non-Impactful Issue (on page 38)
Information incomplete	Request clarification from the reporting technician before deciding.

Result

The issue is routed to completion, rejection, emergency work, planned work, or clarification based on the reviewed evidence.

Next action

Next:

- Complete a valid observation that requires no work order. *(on page 34)*
- Create and release emergency work for an issue that needs immediate action. *(on page 35)*
- Create a planned work order when corrective work requires planning. *(on page 38)*
- Reject a duplicate, incorrect, or non-impactful issue with a reason. *(on page 38)*

4.2. Mark an Issue Complete Without a Work Order

Close a valid observation that requires no corrective work order.

Use this when the issue is valid but requires no further action — for example, a reading that is within acceptable limits.

1. Open the issue that has **Open** status.
2. Tap the More



icon and select **Mark as Complete**.

3. Add comments and attachments explaining why no work order is required.
4. Confirm.

Result

The issue is closed without a work order. Return to the issue list and assess the next issue.

Next action

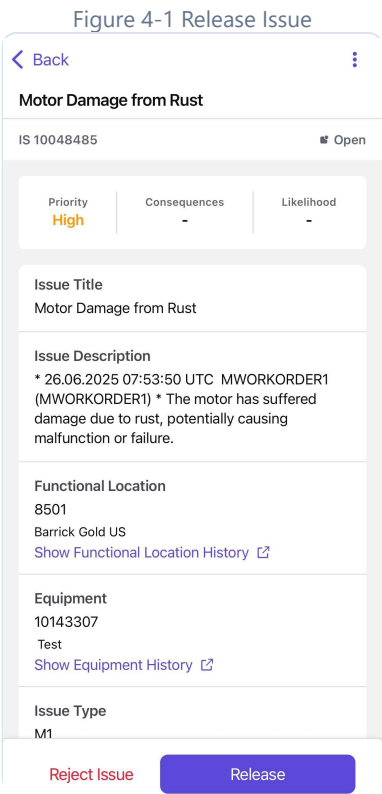
Next: [Return to issue assessment. \(on page 33\)](#)

4.3. Create and Release an Emergency Work Order from an Issue

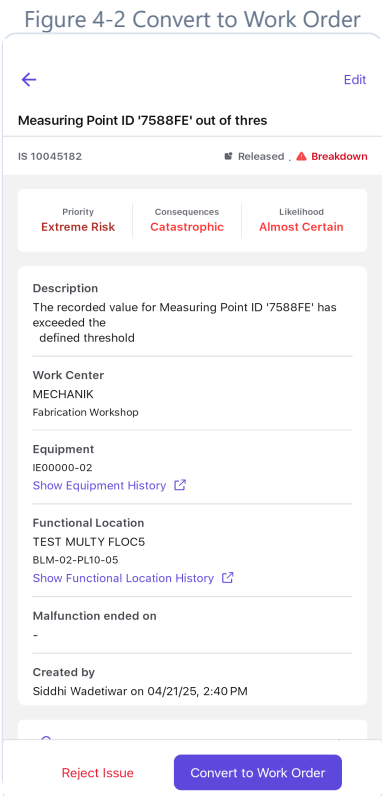
Convert an issue directly into an assigned, released work order for immediate attention.

This is recommended for Emergency or Breakdown work orders that require immediate attention.

1. Open the issue and tap **Release**.



2. Tap **Convert to Work Order**.



3. Select **Assign Technician & Release**.

Figure 4-3 Assign Technician and Release

← Edit

New Issue title rusty pump

IS 10045267 Released Breakdown

Priority: Extreme Risk Consequences: Catastrophic Likelihood: Almost Certain

Description: New Issue title rusty pump

Work Center: MECHANIK Fabrication Workshop

Equipment: Pump, Etanorm 200-1000 GG 57 10000957 Show Equipment History

Functional Location: Inlet pump plant - screening plant K1-ZPW-2 Show Functional Location History

Malfunction started from: 04/22/25, 1:03 PM

Malfunction ended on:

Assign Technician & Release

Add Work Order Details

4. Provide the following details:

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

Figure 4-4 Fill Details and Release

← Edit

New Issue title rusty pump

IS 10045267 Released Breakdown

Priority: Extreme Risk Consequences: Catastrophic Likelihood: Almost Certain

Description: New Issue title rusty pump

Assign Technician & Release

Malfunction started from: 4/22/2025

Assign to: Select Technician

Spares parts required? ☐

Release

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

Result

The work order is created, assigned, and released. Continue to monitoring because execution can now begin.

Next action

Next: [Monitor the released emergency work. \(on page 71\)](#)

4.4. Create a Planned Work Order from an Issue

Convert a non-emergency issue that requires corrective action into a planned work order.

For non-emergency issues that require corrective action, create a proper work order instead of releasing directly.

1. Open the issue and tap **Release**, then **Convert to Work Order**.

2. Select **Add Work Order Details**.

iMaintenance's generative AI feature automatically generates work order details — including operations, components, and permits — based on the issue context.

3. Update work order details as required.

See [Start a Work Order \(on page 40\)](#) and the topics that follow it for the full work-order planning sequence.

Result

A planned work order is created from the issue. Continue with work-order planning to add the required operations and prerequisites.

Next action

Next: [Continue planning the work order. \(on page 40\)](#)

4.5. Reject a Non-Impactful Issue

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

To reject an issue:

1. In the **Issues** screen, open the issue.
2. Tap the **Reject Issue** button at the bottom.
3. In the **Reject Issue** window, add the reason for rejecting the issue and tap **Reject**.

A message, *Issue <number> has been successfully marked as rejected*, is displayed.

Result

The issue changes to Rejected and the reason is retained. Return to the issue list and assess the next issue.

Next action

Next: Return to issue assessment. (*on page 33*)

5. Create and Assign Work Orders

Create a work order from the maintenance need, verify its details, add the required operations and prerequisites, then review and create it for assignment or release.

Work-order planning follows a normal path, with optional branches based on the work requirements.

1. **Define the work:** Start the work order, review AI-suggested details, confirm the equipment and functional location, and set priority and risk.
2. **Add operations:** Use a task list or add operations manually. These are alternative methods.
3. **Add prerequisites when required:** Add sub-operations, components, permits, Work Instructions, and forms only when they apply to the work.
4. **Finalize:** Review work-order readiness, then create the work order for assignment, release, or monitoring.

To create related work from an existing record, use a sub-work order, duplicate work order, or follow-on work order instead of restarting the normal creation path.

Begin with [Start a Work Order \(on page 40\)](#).

Understand a Work Order

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

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

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

Create Work Orders Using AI Plan

Work Orders can be created using **AI-assisted input (AI Plan)**. Type a short prompt describing the issue, or upload a photo, and AI Plan suggests:

- Relevant equipment
- Likely operations
- A task description based on your input

Review and adjust the suggested details before saving the Work Order.

5.1. Start a Work Order

Begin creating a work order by describing the issue using the camera, a text prompt, or voice input.

To start a work order:

1. Navigate to the **Work Orders** screen.

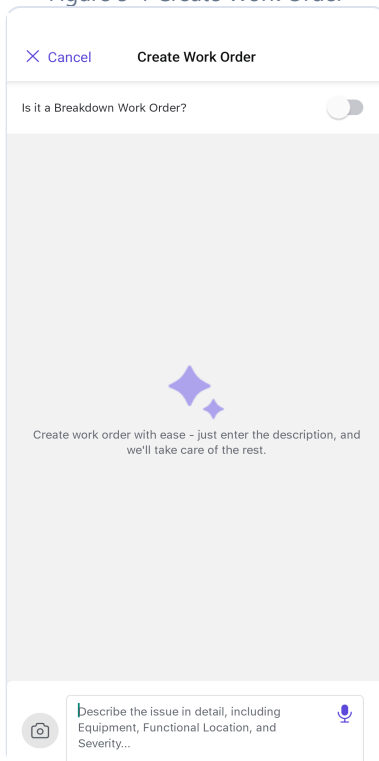


2. Tap the Create icon at the bottom-right of the screen.

3. In the **Create Work Order** screen, describe the issue using one of the following methods:

- **Use the Camera:** Tap the Camera  icon to capture or upload a photo of the issue. The system uses the image to identify the problem and suggest relevant fields.
- **Type a Prompt:** Enter key details like equipment, functional location, and severity in the text box.
- **Use Voice Input:** Tap the Mic  icon and speak your description. The system records and analyzes your input to auto-fill details using AI.

Figure 5-1 Create Work Order



Note:

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



4. Tap the Enter icon.

Result

The AI assistant (AI Plan) processes the input and displays suggested equipment, root causes, and operations for review.

Next action

Next: review the AI-suggested details before accepting the generated plan. *(on page 42)*

5.2. Review AI-Suggested Details

Review and adjust the work order details the AI assistant suggests before saving.

The AI assistant (AI Plan) uses your input to suggest the right equipment, identify likely root causes, and recommend appropriate operations.



Tip:

Review and adjust the AI-suggested details before saving the work order.



Note:

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

1. Review the AI-suggested fields:

Figure 5-2 AI Generated Work Order Details

The screenshot shows a mobile application interface for creating a work order. At the top, there's a header bar with a 'Cancel' button (marked with an 'X') and the title 'Create Work Order'. Below this is a toggle switch for 'Is it a Breakdown Work Order?'. The main content area is divided into two sections. The first section, 'Equipment & Functional Location Detected', contains two text boxes: 'Equipment' with the value 'Electric pump motor 10004171' and 'Functional Location' with the value 'Inlet pump plant - screening plant K1-ZPW-2'. Below these is a link 'Incorrect Equipment and Functional Location? Change' and a note: 'You can update the equipment and functional location now, or make changes later if needed.' The second section, 'Work Order details Detected', has a 'Clear All' link on the right. It contains three text boxes: 'Title' with 'Rust causes motor failure', 'Description' with 'The motor malfunction is caused by rust, likely due to exposure to moisture or water, which has compromised the motor's integrity and functionality.', and 'Priority' with 'High'. At the bottom is a large blue 'Next' button.

- **Equipment:** The machine or equipment in need of maintenance or repair.
- **Functional Location:** The area where the equipment is located. See [Select Equipment and Functional Location \(on page 44\)](#) to change it.
- **Title:** Title or a brief description of the work order.
- **Description:** A detailed explanation of the work order.
- **User Status:** Tap to change the status of the work order — for example, INIT, APPR, RJEC, CLSD.
- **Work Order Type:** Select the required type from the drop-down — for example, Corrective WO, Preventive WO.
- **Cost Center:** The cost center for the selected Equipment or Functional Location. Select a valid cost center if no value is populated.
- **Maintenance Activity Type:** Populates automatically based on the selected Work Order Type.
- **Maintenance Plant:** Populates automatically based on the selected Equipment or Functional Location.
- **Planning Plant & Planning Group:** Populate automatically based on the rules.
- **Priority:** The urgency of the work order. See [Set Priority and Risk \(on page 44\)](#) to change it.

2. Tap **Update Details** to change any Work Order detail directly.

Result

The work order contains reviewed values rather than unverified AI suggestions. Next, confirm the equipment and functional location used for planning.

Next action

Next: confirm the equipment and functional location. *(on page 44)*

5.3. Select Equipment and Functional Location

Confirm the equipment and functional location before planning the work so dependent plant and planning values use the correct asset context.

Equipment and Functional Location are auto-populated by the AI assistant based on your description. Change them if they are incorrect.

1. On the work order details screen, tap **Change** next to Equipment or Functional Location.
2. Select the correct Equipment or Functional Location from the list.
3. Review the **Cost Center** value and, if required, tap the Cost Center field to select another valid value.

Result

The asset context is confirmed and dependent plant and planning values are updated. Next, review priority and risk.

Next action

Next: review priority and risk. *(on page 44)*

5.4. Set Priority and Risk

Review the suggested risk and priority before adding operations so the work can be planned at the appropriate urgency.

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

1. Tap **Priority** to review or change it.

**Note:**

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

Figure 5-3 Update Priority

The screenshot shows the 'Priority Determination' screen. At the top, it says 'Priority is determined based on the risk matrix'. Below this, there are several sections: 'People' with a 'Risk Level : High' label, a question 'What is the potential impact on people in the event of this risk materializing?' with a 'Moderate' button, and 'What is the likelihood of this risk occurring?' with a 'Likely' button. A red bar indicates 'Risk Level : High'. Below this are sections for 'Asset', 'Likelihood', and 'Environment', each with a 'Risk Level : High' label. At the bottom, it shows 'Overall Priority : High' and a 'Done' button.

2. In the **Priority Determination** (risk assessment) screen, assess the risk level by selecting the likely impact in each category:

- a. **People:** Impact of the issue on worker safety.
- b. **Assets:** Potential damage to equipment.
- c. **Likelihood:** How likely the issue is to occur.
- d. **Environmental:** Impact on surroundings or compliance.

Based on your selections, the AI automatically calculates the **Overall Priority** as **Low**, **Medium**, or **High Risk**.

For example, if a valve leak poses a significant threat to nearby equipment and has a high likelihood of recurring, the system flags it as a **High Risk** work order.

3. Tap **Done**.

Result

The work order uses the confirmed priority and risk values. Next, add operations from a task list or add them manually.

**Note:**

You can manually select Priority instead of using the Risk Assessment Matrix when the option is available.

Next action**Next:**

- Add operations from a configured task list. *(on page 46)*
- Add an operation manually when the task is not in a task list. *(on page 48)*

5.5. Add Operations from a Task List

Divide a work order into operations selected from an existing task list and assign each one to a technician based on expertise.

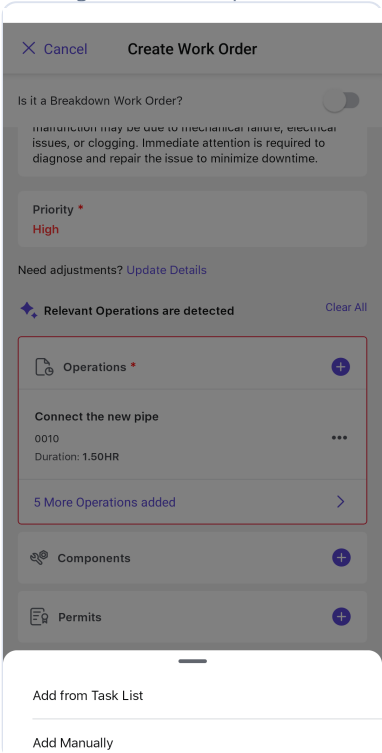
Operations help with the following:

- **Better Task Distribution:** Assign different operations to technicians based on their expertise.
- **Parallel Work:** Splitting a work order into multiple operations lets technicians work on different parts of the job at the same time.
- **Flexibility:** Operations can be reassigned to other technicians in case of emergencies or technician unavailability.

Not all operations require a technician assigned individually — the person assigned to the overall work order can still review and confirm operations with no individual assignment.

1. In the **Operations** tab, tap the Add  icon.

Figure 5-4 Add Operations



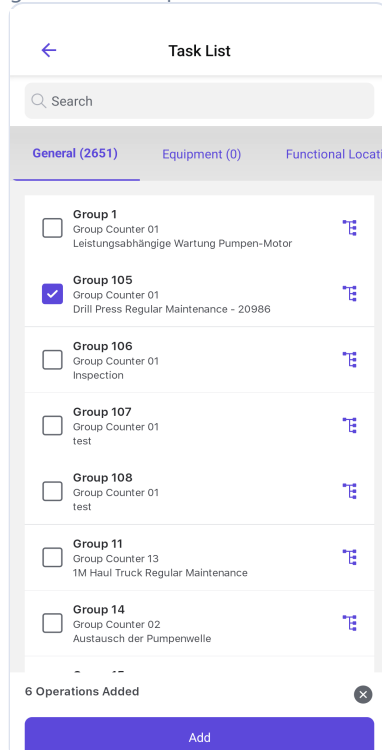
2. Select **Add Task from Task List**.

3. Choose the relevant operation from the list in the **General**, **Equipments**, or **Functional Locations** tab.

**Note:**

- Tabs are only displayed if they contain operations.
- If none of the tabs have operations, the entire section is hidden and the message "No Operations are present in the tasklist." is shown.

Figure 5-5 Add Operations From Task List



4. Tap **Add**, then **Done** once all operation details are filled in.

Result

The selected operations are added to the work order. Review or edit them, then add any required components, permits, Work Instructions, or forms.

Next action

Next: Review or edit the added operations. (on page 49)

5.6. Add an Operation Manually

Add an operation manually when the required task is not available in a configured task list.

Use this when the required operation is not available in the task list.

1. In the **Operations** tab, tap the Add  icon.
2. Select **Add Manually**.
3. In the **Operation Details** screen, fill in the details and tap **Save**.

Result

The operation is added to the work order. Repeat for remaining operations, then review operation details and prerequisites.

Next action

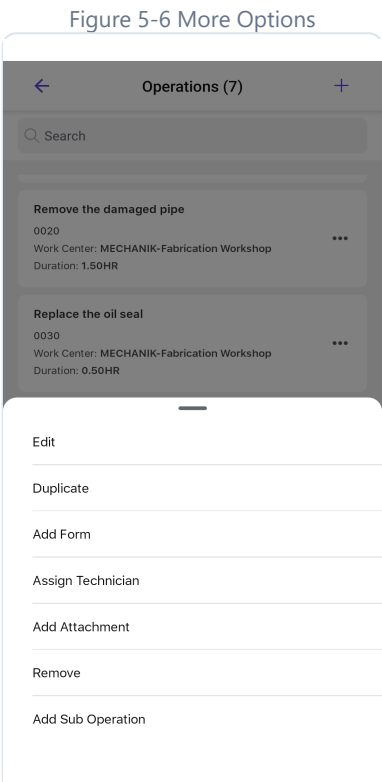
Next: Review the operation details and available actions. *(on page 49)*

5.7. Edit or Remove an Operation

Modify an operation's details, or remove, duplicate, or add a sub-operation to it.

To modify an existing operation:

1. In the **Operations** screen, tap the More  icon next to the operation.



2. Select the required action:

- **Edit** to modify Description, Planning Plant, Work Center, Control Key, Plant, Activity Type, Number of Resources, Duration, Unit of Work, Equipment, or Functional Location.
- **Duplicate** to duplicate the operation.
- **Add Form** to add forms from the list.
- **Assign Technician** to assign the technician based on the work center or plant.
- **Add Attachment** to add images, videos, and documents.
- **Add Sub Operation** to add a sub-operation — see [Add Sub-Operations \(on page 52\)](#).
- **Remove** to delete the operation.

Figure 5-7 Edit Operation Details

Figure 5-7 Edit Operation Details

× Cancel Operation Details

Operation Number

0080

Description *

Repair Pump

Planning Plant

1000 ▼

Hamburg

Work Center *

MECHANIK ▼

Fabrication Workshop

Control Key *

ZREL ▼

Save

3. Tap **Save** to confirm your changes.

Result

The operation list reflects the saved changes. Continue with any required sub-operations, components, permits, Work Instructions, or forms.

Next action

Next: When prerequisites are complete, review work-order readiness. *(on page 63)*

5.8. Add Sub-Operations

Break down a complex operation into smaller sub-operations for easier tracking.

Sub-Operations divide an Operation into smaller units of work that can be managed, assigned, executed, and confirmed independently. Sub-Operations can be added manually or automatically included when a configured parent Operation is added from a task list.

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

1. Operation: Dismantle the Compressor

- **Sub-Operation 1:** Remove external covers and panels.
- **Sub-Operation 2:** Disconnect electrical connections.
- **Sub-Operation 3:** Detach motor and compressor unit.

2. Operation: Inspect and Service Components

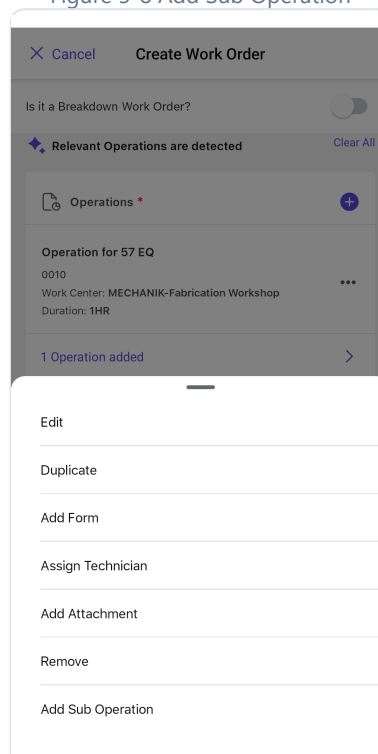
- **Sub-Operation 1:** Check bearings for wear.
- **Sub-Operation 2:** Inspect and replace seals.
- **Sub-Operation 3:** Clean and lubricate moving parts.

Adding sub-operations makes complex maintenance tasks easier to manage, execute, and track.

To add sub-operations:

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

Figure 5-8 Add Sub Operation



2. In the **Operation Details** screen, fill in the details and tap **Save**. For more information, see [Add Operations from a Task List \(on page 46\)](#).

Result

The sub-operation is added under the selected operation.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. ([on page 63](#))

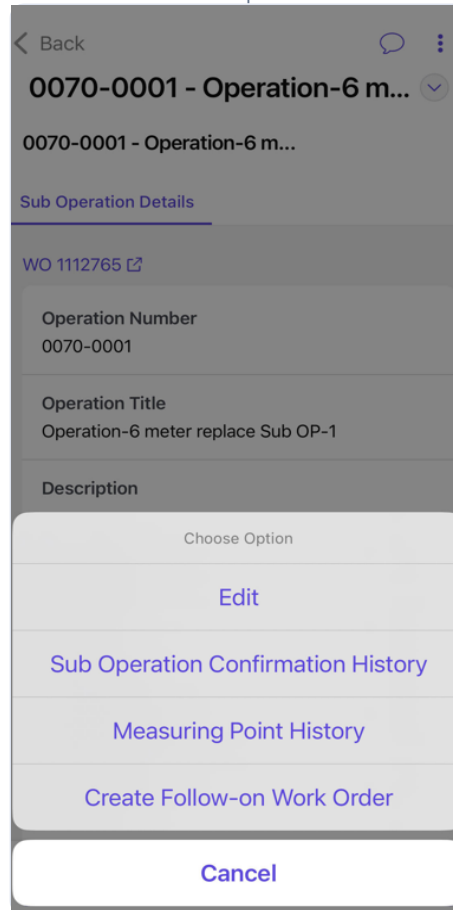
5.9. Manage Sub-Operation

Break down a complex operation into smaller units of work that can be performed, edited, deleted, and managed independently from the parent operation. Sub-Operations can also be assigned separately to technicians

To modify an existing operation:

1. In the **Sub-Operations** screen, tap the More  icon next to the sub-operation.

Figure 5-9
More Options



2. Select the required action:
 - **Edit:** to modify Description, Planning Plant, Work Center, Control Key, Plant, Activity Type, Number of Resources, Duration, Unit of Work, Equipment, or Functional Location.
 - **Sub Operation Confirmation History:** view confirmation records for the Sub-Operation.
 - **Measuring Point History:** view measuring point records
 - **Create Follow-on Work Order:** Create a follow-on Work Order from the Sub-Operation.
3. Tap **Cancel** to cancel the action.

Result

The Sub-Operation is updated under the selected operation and can be managed independently from the parent operation.

Next action

Next: When prerequisites are complete, review work-order readiness. (on page 63)

5.10. Add Components

Add the components, such as spare parts and tools, required to complete a work order.

Add components during planning when the job requires specific materials, spare parts, or tools. Linking them to the work order or operation gives the technician the required quantity, material, operation, and recipient details before execution.

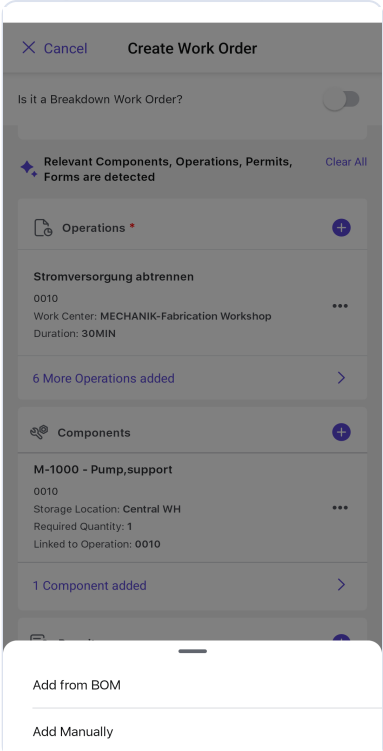
To add components to the work order:

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

A pop-up is displayed with the following options:

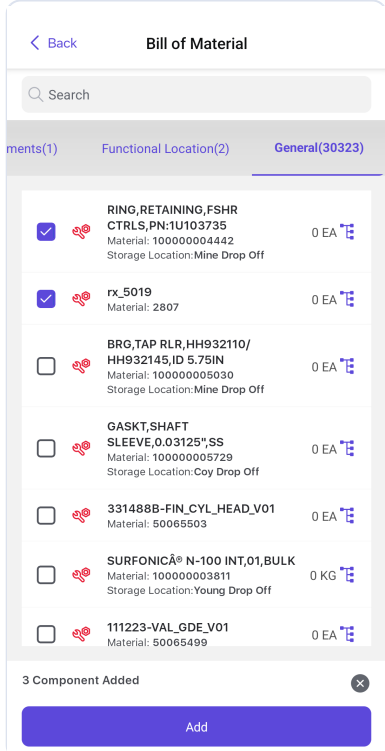
- **Add from BOM (Bill of Materials)**
- **Add Manually**

Figure 5-10 Add Components



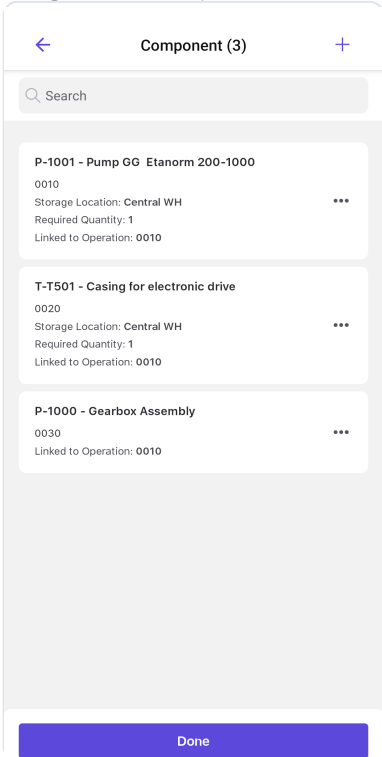
2. If you select **Add from BOM**, do the following:
- a. Choose the relevant components from the list in the **General**, **Equipments**, or **Functional Locations** tab.

Figure 5-11 Select Components from BOM



- b. Tap the **Add** button.
- c. In the **Components** screen, you can view the list of components.

Figure 5-12 Components Screen



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

Figure 5-13 More Options

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

Result

The component is added with the selected quantity, operation, and recipient information.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.11. Attach or Raise a Permit

Ensure the correct permit is linked to the work order before it is assigned to a technician.

Before you begin

Permit capabilities require **iPermits** to be integrated with your iMaintenance implementation.

Choose one of the following, depending on whether the required permit already exists:

Table 5-1 Attach vs. Raise a Permit

Situation	Action
A permit requirement already exists for this work	Attach the existing permit requirement (steps below)
No permit exists yet for this work	Raise or link a permit through iPermits — see Raise a Permit (on page)

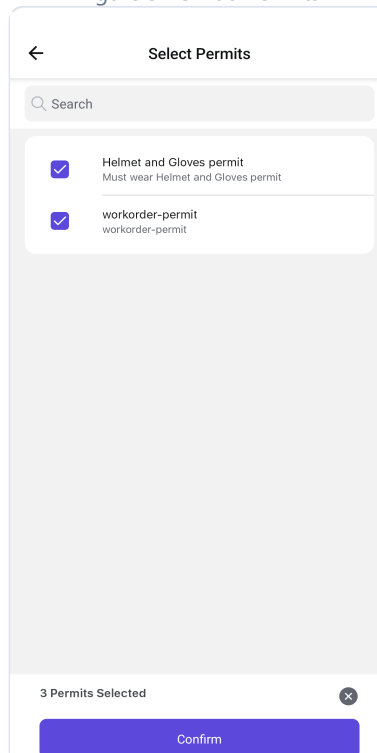


Important:

Attaching, raising, reviewing, authorizing, issuing, acknowledging, surrendering, and closing a permit are different actions performed by different roles at different lifecycle stages. Use this task only to attach an existing permit requirement from iMaintenance; complete the permit lifecycle in iPermits.

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

Figure 5-15 Add Permits



In the **Permits** screen, tap the More  icon and select:

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

Result

The permit is linked to the work order. Full permit lifecycle management — authorization, issuance, execution, and closure — is documented in the iPermits guide.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.12. Attach a Work Instruction to a Work Order

Attach a Work Instruction that applies to the entire work order, not just a single operation.

Before you begin

This is available only when Digital Work Instructions (DWI) is integrated with your iMaintenance implementation.

Work-order-level instructions are functionally owned and authored in DWI. This topic covers only how to attach one from iMaintenance.

1. Open the work order and go to the **More** menu.
2. Select **Edit Work Order**.
3. Attach the required Work Instruction to the work order.

See Add Work Instructions at Work Order Level (on page) in the DWI Supervisor guide for the full procedure.

Result

Technicians see the attached instruction under the **Work Instructions** tab on the work order.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.13. Attach a Work Instruction to an Operation

Attach an operation-level Work Instruction when only that operation requires the procedure.

Before you begin

This is available only when DWI is integrated with your iMaintenance implementation.

Operation-level instructions are functionally owned and authored in DWI.

1. Open the operation and tap the More icon.
2. Attach the required operation-level Work Instruction.

See Add Work Instructions at Operation Level (on page) in the DWI Supervisor guide for the full procedure.

Result

Technicians see the attached instruction when they open that operation.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.14. Understand How Work Instructions Are Automatically Assigned

Work Instructions can be automatically added to a work order based on configured mapping rules rather than manual attachment.

When a work order is created, Work Instructions can be automatically populated based on the Functional Location and Asset, reducing the need to manually select them. Whenever key fields change (Work Order Type, Asset, Functional Location, Maintenance Plan, Task List, or Operations), the system automatically updates the Work Instructions.

- Selecting an Asset or Functional Location alone does not trigger Work Instructions.
- Work Order Type must also be set to trigger auto-population.
- Asset-level mapping takes priority over Functional Location-level mapping.

The full mapping configuration is documented in the DWI Supervisor guide. See Auto Assign Work Instructions with AI (on page).

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.15. Remove a Linked Work Instruction

Unlink a Work Instruction that was attached to a work order or operation by mistake or is no longer relevant.

Removing a linked instruction unlinks it from the work order or operation — it does not delete the instruction from the DWI library.

1. Open the work order or operation and go to the **Work Instructions** tab.
2. Select the linked instruction and tap **Delete**.

The full procedure is documented in the DWI Supervisor guide. See Remove Linked Instructions at Operation Level (on page).

Result

The instruction is unlinked and remains available in the DWI library to be re-added if needed.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.16. Add Forms

Attach standalone forms, such as checklists or inspection reports, to a work order.

Attach a form when the job requires a checklist, inspection record, risk assessment, or other structured evidence. Forms may be assigned automatically by configuration or added manually during planning.

For example, service on a high-voltage electrical panel may require a pre-maintenance safety checklist, emergency inspection form, or risk assessment form.



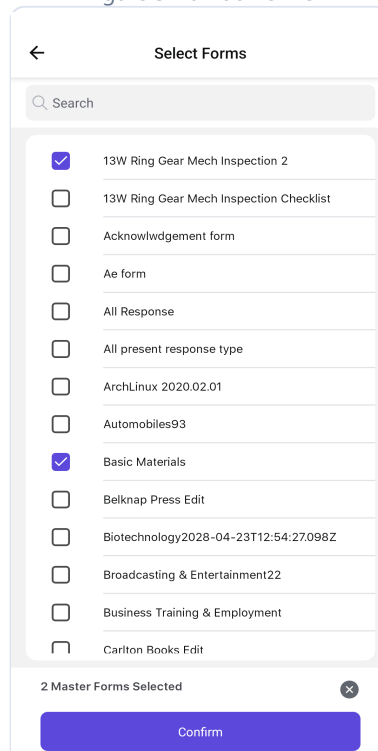
Note:

Forms can be automatically assigned based on Equipment, Functional Location, Task List, Maintenance Plan, or Order Type.

To add forms to the work order:

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

Figure 5-16 Add Forms



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

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

Result

The selected form is attached at the applicable work-order or operation level.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

5.17. Review Work-Order Readiness

Review a work order's details before creating it.

Before creating the work order, review that operations, components, permits, Work Instructions, and forms are correctly attached.

Tap **Review** to review the work order details.

Figure 5-17 Review Work Order

Figure 5-17 Review Work Order

✕ Cancel Create Work Order

Is it a Breakdown Work Order? ☐

Work Order

Title

Pump malfunction reported

Work Order Type *

PM02

Corrective WO

Equipment

10000957

Pump, Etanorm 200-1000 GG 57

Priority *

High >

Description *

The industrial pump has stopped functioning properly,

Review

Result

The required details and prerequisites are ready. Create the work order using the action available for the current flow.

Next action

Next: create the work order. (on page 64)

5.18. Create the Work Order

Finalize the work order details so it becomes available for planning or assignment.

To create the work order:

Tap **Create**.

Figure 5-18 Finalize Work Order

The screenshot shows a mobile application interface for creating a work order. At the top, there's a back arrow and the title 'Work Order Details'. Below this, there are three columns for 'Priority' (High), 'Consequences' (Major), and 'Likelihood' (Likely). The main form contains several sections: 'Title' with the text 'Pump malfunction reported'; 'Description' with a paragraph about a pump malfunction; 'Equipment' with details 'Pump, Etanorm 200-1000 GG 57' and '10000957', plus a link 'Show Equipment History'; 'Functional Location' with 'Inlet pump plant - screening plant' and 'K1-ZPW-2', plus a link 'Show Functional Location History'; 'User Status' with 'INIT' and 'Initial'; and 'Work Center' with 'MECHANIK' and 'Fabrication Workshop'. A large blue 'Create' button is at the bottom.

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

Result

The work order is created and is available for planning, assignment, release, or monitoring according to the selected flow.



Note:

To edit it, open the work order, tap the **More** icon, and select **Edit Work Order**.

Next action

Next: Monitor the work after it is assigned or released. (on page 71)

5.19. Create a Sub Work Order

Create a sub-work order from an existing parent work order to break down large tasks.

To create a sub-work order:

1. Open the work order.
2. Tap the More



icon on top-right and select **Create Sub-Work Order**.

3. In the Create Sub-Work Order screen, enter the issue details. For more information, see [Start a Work Order \(on page 40\)](#).
4. Tap **Next**.
5. Tap **Review**.
6. Review the details and tap **Create**.

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

Result

The sub-work order is created under the selected parent work order.

Next action

Next: [Review and plan the new related work order. \(on page 40\)](#)

5.20. Create a Work Order from Existing One

Choose Duplicate Work Order or Follow-on Work Order to create a new work order from an existing one.

Instead of creating a work order from scratch, you can start from an existing one. iMaintenance offers two options, depending on whether the new work order should stay linked to the original:

- **Duplicate Work Order:** Copies an existing work order as an unrelated, independent starting point, with no link kept to the original. Use this for unrelated or future work. See [Duplicate Work Order \(on page 66\)](#).
- **Follow-on Work Order:** Creates a new work order that stays linked to the work order or operation it came from. Use this when the new work is a direct consequence of what was found or done on the original — for example, additional work discovered while completing a prior job. See [Create a Follow-on Work Order \(on page 68\)](#).

5.20.1. Duplicate Work Order

Use Duplicate Work Order to reuse an existing work order as a starting point for unrelated work.

To duplicate the work order:

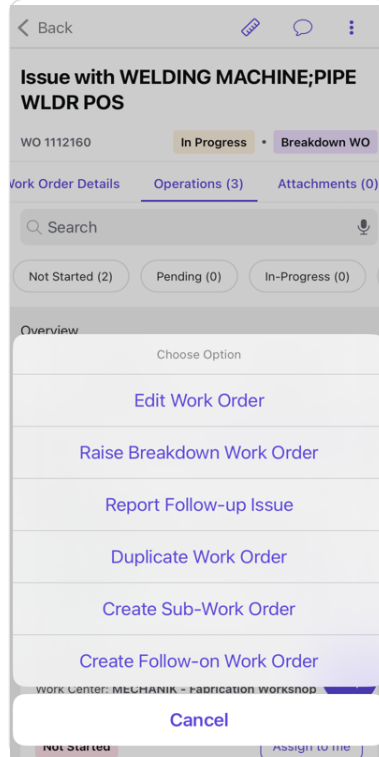
1. Open the work order you want to copy.
2. Tap the More



icon on top-right.

3. In the **Choose Option** window, select **Duplicate Work Order**.

Figure 5-19 Duplicate or Copy Work Order



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



Tip:

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

Result

The duplicate work order is created as a separate record for review and planning.

Next action

Next: Review and plan the new related work order. *(on page 40)*

5.20.2. Create a Follow-on Work Order

Create a follow-on work order that stays linked to the work order or operation it came from.

To create a follow-on work order:

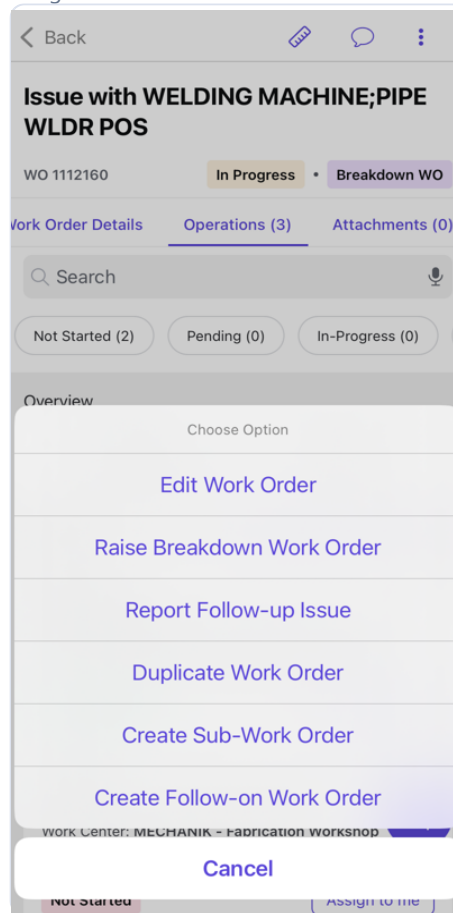
1. Open the work order you want to copy.
2. Tap the More



icon on top-right.

3. In the **Choose Option** window, select **Create Follow on Work Order**.

Figure 5-20 Create Follow on Work Order



4. Select how much to copy from the original:
 - a. **Select All** – copies the header details along with Operations, Components, and Forms.
 - b. **Header Only** – copies just the header details.
5. Review the details, make any changes as required, and tap **Create**.

Result

The follow-on work order is created with a traceable relationship to its source work order or operation.

Next action

Next: Review and plan the new related work order. *(on page 40)*

6. Monitor and Intervene

During execution, identify work that is at risk, unassigned, on hold, overdue, or awaiting review, then take the action needed to keep the shift moving.

Use the Supervisor Dashboard and work-order lists as a monitoring hub. Select the route that matches the condition you need to address; these tasks are alternatives, not a required sequence.

What you find	Action
Scheduled work may miss its plan.	Review Scheduled Work at Risk (on page 71)
An operation has no technician.	Review Unassigned Operations (on page 72) or Reassign Work (on page 73)
Work is on hold or dates cannot be met.	Review Work on Hold (on page 72) or Reschedule Work (on page 74)
Clarification is needed from the technician.	Contact a Technician Using Contextual Chat (on page 75)
Execution is finished.	Review timesheets and completion records, then continue to closure.

After an intervention, return to the Dashboard and verify that the risk or blocker is resolved. When execution records are complete, continue to [Review and Close Completed Work \(on page 81\)](#).

6.1. Review Scheduled Work at Risk

Identify scheduled work that may miss its planned start or finish and resolve the cause.

The at-risk view helps supervisors review work affected by component readiness, permit status, incomplete planning, technician availability, or schedule conflicts.

1. Open **Scheduled Work Orders at Risk** on the Supervisor Dashboard.
2. Review the work order, assigned technician, planned start, priority, and pending-part information.
3. Open the work order and review operations, components, permits, Work Instructions, forms, and attachments.
4. Determine whether the work must be reassigned, rescheduled, or updated.
5. Complete the required action and verify the revised assignment or schedule.

Result

The identified risk is resolved or clearly assigned to the person responsible for the next action.

Next action

Next: Return to the Dashboard and verify that the risk or blocker is resolved. *(on page 71)*

6.2. Review Unassigned Operations

Find operations that do not yet have a technician and assign them before execution.

Review unassigned work at the beginning of the shift and whenever assignments change.

1. Open the Supervisor Dashboard.
2. Open **Technician Assignment, Unassigned Operations**, or the equivalent assignment list available in your configuration.
3. Review the work order, operation, priority, planned date, work center, and required resources.
4. Open the operation that requires assignment.
5. Assign an available technician and save the change.
6. Verify that the operation no longer appears in the unassigned list.

Result

The operation is assigned and is available to the selected technician after synchronization.

Next action

Next: Return to the Dashboard and verify that the risk or blocker is resolved. *(on page 71)*

6.3. Review Work on Hold

Identify the reason work is paused and take the action required to resume it safely.

Work may be placed on hold because of unsafe conditions, unavailable components, permit restrictions, production conflicts, or missing information.

1. Open the work-order or operation list and filter for **On Hold** records.
2. Open the affected work order and review the hold reason, comments, chat, and recent activity.
3. Confirm whether components, permits, instructions, equipment access, or technician availability are blocking the work.
4. Contact the assigned technician when clarification is required.
5. Resolve the blocker by updating the schedule, assignment, work details, or related safety workflow.
6. Confirm that the responsible user can resume the work under the approved process.

Result

The hold reason is understood and the next responsible action is recorded. Work resumes only after the blocking condition is resolved.

Next action

Next: [Return to the Dashboard and verify that the risk or blocker is resolved. \(on page 71\)](#)

6.4. Reassign Work

Assign an at-risk or unassigned operation to another available technician.

Use reassignment when the current technician is unavailable, overloaded, or no longer suitable for the work. You must have assignment permission, and the work must be in a status that allows the assignment to change.

1. Open the work order from **Scheduled Work Orders at Risk, Unassigned Operations**, or the applicable work-order list.
2. Open the operation that requires a different technician.
3. Tap **Action**, then select **Reassign**.
4. Review the available technicians and select the required technician.
5. Save or confirm the assignment.
6. Verify that the selected technician appears on the operation.

Result

The operation is assigned to the selected technician and becomes visible to that technician after synchronization.

**Note:**

If **Reassign** is unavailable, check the operation status, work center, technician availability, and your permissions.

Next action

Next: Return to the Dashboard and verify that the risk or blocker is resolved. *(on page 71)*

6.5. Reschedule Work

Update planned dates when the current schedule can no longer be met.

Reschedule work when materials, permits, equipment access, production conditions, or technician availability prevent the job from starting or finishing as planned.

1. Open the work order from **Scheduled Work Orders at Risk** or the work-order list.
2. Tap **Action**, then select **Reschedule**.
3. Review the current planned start and end dates.
4. Enter the revised dates and times.
5. Confirm that the new dates remain within any applicable permit validity and maintenance-plan constraints.
6. Save or confirm the revised schedule.

Result

The work order displays the revised planned dates.

**Note:**

Review the technician assignment, permit validity, and component readiness after rescheduling.

Next action

Next: Return to the Dashboard and verify that the risk or blocker is resolved. *(on page 71)*

6.6. Contact a Technician Using Contextual Chat

Message a technician from the related work order or operation so the conversation remains in context.

Use contextual chat to clarify work status, blockers, assignments, or evidence without separating the conversation from the job.

1. Open the relevant work order or operation.
2. Tap the **Chat** icon.
3. Enter the message.
4. Use an @mention when a specific technician or user group must be notified.
5. Attach a supported file when it helps explain the question or condition.
6. Send the message.

Result

The message is stored with the work context. Mentioned users receive a push notification when notifications are enabled.

Next action

Next: Return to the Dashboard and verify that the risk or blocker is resolved. *(on page 71)*

6.7. Act on Work Instruction Feedback

Review feedback technicians submit on Work Instructions used in your work orders.

DWI authoring owns feedback review and resolution. Use the DWI Supervisor workflow when feedback affects work instructions linked to your work orders.

1. Open the DWI authoring dashboard's **Feedback** tab.
2. Review feedback related to instructions used in your work orders.

The full review and resolution procedure is documented in the DWI Supervisor guide. See Review Instructions Feedback (on page).

Result

The feedback is reviewed and routed for correction, rejection, or urgent safety escalation.

Next action

Next: Return to work-order planning and review readiness after completing the remaining prerequisites. (on page 63)

6.8. Review Work Awaiting Technical Completion

Review work orders that have finished execution but still require supervisor or SAP completion actions.

Use this review when a work order has completed field execution but has not reached the final configured completion status.

1. Open the applicable pending-action or status list on the Supervisor Dashboard.
2. Open the work order awaiting technical completion.
3. Review operations, confirmations, time, forms, measurements, attachments, components, follow-up issues, and permits.
4. Resolve any pending or rejected records.
5. Perform the available technical-completion or closure action according to your configuration.

Result

The work order advances to the configured technical-completion or closure status, or remains pending with the unresolved requirement identified.

Next action

Next: Review any pending timesheets before final completion or closure. *(on page 77)*

6.9. Approve or Reject a Timesheet

Review submitted work time and either approve it or return it to the technician with a clear reason.

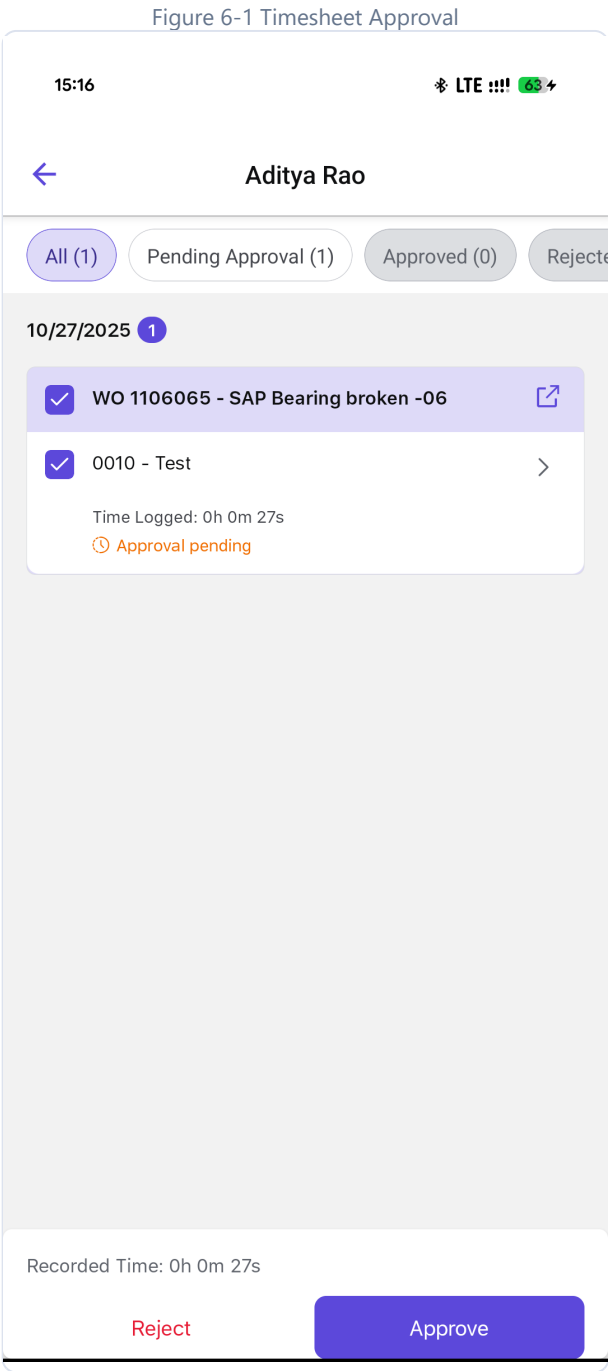
Timesheets track the time technicians spend on work order operations. They support:

- **Accurate Work Tracking:** Recording hours worked on each task.
- **Improved Resource Management:** Allocating tasks effectively.
- **Fair Compensation:** Recording work hours for payroll or overtime calculations.
- **Operational Efficiency:** Reviewing job durations to improve work scheduling.

Review the submitted work order and operation details before approving or rejecting the entry.

1. Navigate to the **More** screen.
2. Select the **Timesheets** module.
3. In the **Timesheets** screen, select the technician from the list.

4. Choose the timesheet or work log you want to review.



- Review the submitted details, such as **Work Order Number**, **Work Order Description**, **Time Logged**, and **Operation Number**.

Figure 6-2 Timesheet Details

15:17 LTE !!! 68%

←

Section

Technician *

Aditya Rao

aditya.regalla@innovapptive.com

Data Entry Profile

Actual Start Time

10/27/2025 18:25

Actual End Time

10/27/2025 18:25

Total Duration *

00 hr 00 min 27 sec

Long text

Reject Approve

- Tap **Approve** to approve the timesheet.

If approved, the approval status and approver's name are shown on the timesheet details screen.

- Alternatively, tap **Reject**, provide a valid reason for rejection, and confirm the action.

If rejected, the rejection status, comments, and name of the rejecting supervisor are visible on the same screen.

Result

The timesheet is approved or rejected. Use the available search and filter options to find specific timesheets.

Next action

Next: After reviewing time, verify the complete execution record. *(on page 80)*

6.10. Review Completed Work

Verify execution records and safety evidence before technical completion or closure.

Review completed work before changing the work order to its final status. The actions and status names available to you depend on your organization's SAP and iMaintenance configuration.

1. On the Supervisor Dashboard, select **Status** from **View by** and open the **Completed** list.
2. Open the work order.
3. Review completed operations and technician confirmations.
4. Review submitted timesheets and resolve rejected or pending entries.
5. Confirm that required forms, measurements, attachments, and component records are complete.
6. Review follow-up issues and confirm that additional work is planned or linked correctly.
7. Confirm that required permits have been surrendered or closed and that no unresolved synchronization errors remain.
8. Add review comments or request corrections when required.

Result

The work order is ready for the configured technical-completion or closure action, or it is returned for correction with the missing information identified.

Next action

Next: Close the work order when all required records are complete. *(on page 81)*

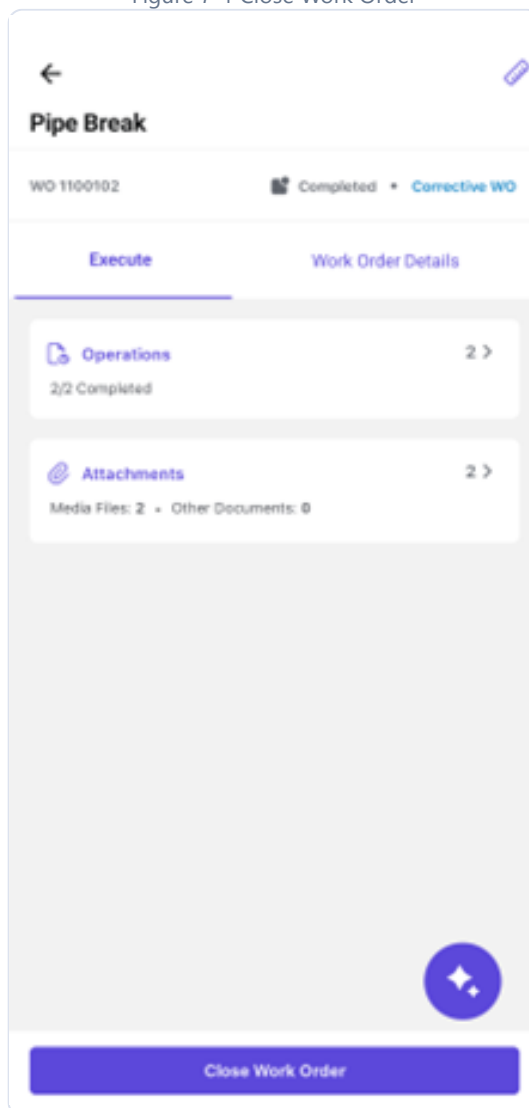
7. Close a Work Order

After execution is complete, verify time, safety, component, form, and follow-up records before closing the work order.

Once you receive the completed work order from a technician, review the completed operations, used components, recorded time, and attached notes or images. Close the work order when no discrepancies are found.

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

Figure 7-1 Close Work Order



3. In the **Close Work Order** screen, add notes or attachments, and tap **Close**.

Result

A message confirms successful closure, the work-order status changes to **Closed**, and the record is available for subsequent reference.

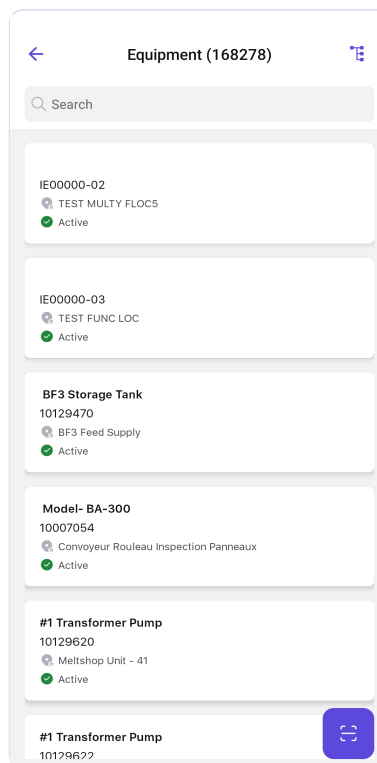
8. View Equipment Details

Review equipment information, related work, documents, hierarchy, and measuring points.

Use the Equipment module to confirm the asset and review the information available to maintenance supervisors. Available tabs and actions depend on configuration and permissions.

1. Open **More** and select **Equipment**.
2. Select the equipment from the list.

You can also use the available scan action when the equipment has a supported code.



3. Review the Dashboard, Details, Hierarchy, Attachments, Measuring Points, and other tabs available for the equipment.

Result

The selected equipment record opens so you can review related work, create or plan work when permitted, and monitor measurements.

Review Related Work and Asset Information

The Dashboard displays the equipment information configured for your organization, such as related work orders, issues, status information, trends, or alerts. Do not treat a displayed trend as a maintenance decision unless it is supported by the approved site process.

1. Open the equipment **Dashboard**.
2. Review the work orders, issues, status information, and other indicators shown for the asset.
3. Open the applicable record when follow-up is required.

Use [Start a Work Order \(on page 40\)](#) when maintenance work must be planned and your role provides that action.

4. Use **Set Geo Tag** only when the action is available and your site process requires location coordinates for the equipment.

Result

You can identify related maintenance activity and continue with an available role-based action.

Review Equipment Master Data and Documents

The Details area can include General, Location, Organization, Structure, Classification, Warranty, Partner, and DMS attachment information.

1. Open the equipment **Details** tab.
2. Review the applicable information sections.
3. Open an attachment or related object when additional information is required.

Result

The equipment master data and available supporting documents are displayed.

Review Measuring Points and Readings

Before you begin

The Measuring Points tab appears only when the module is enabled and your role has access.

1. Open **Measuring Points**.
2. Search by measuring-point number or description when required.
3. Review the Measuring Point ID, position, description, last reading, and available history.
4. Open the reading history or select **Take Reading** when the action is available.
5. Use the Add action to create a measuring point only when your role and site process permit master-data creation. See [Create a Measuring Point \(on page 85\)](#).

Result

The selected measurement history or reading-entry screen opens.

8.1. Create a Measuring Point

Create a measuring point to track equipment condition and performance over time.

To create a measuring point:

1. Navigate to the **Equipment** module.
2. Select the equipment from the list.

3. In the **Measuring Point** tab, tap the Create  icon at the bottom of the screen.

4. In the **Create Measuring Point** screen, enter the following details:

Figure 8-1 Create Measuring Point

Basic Information

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



Note:

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

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

Measurement Range

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

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



Note:

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

Result

The measuring point is created or submitted according to the user's permission and synchronization state.

Next action

Next: Return to the operation and complete the remaining work before confirmation. (on page)

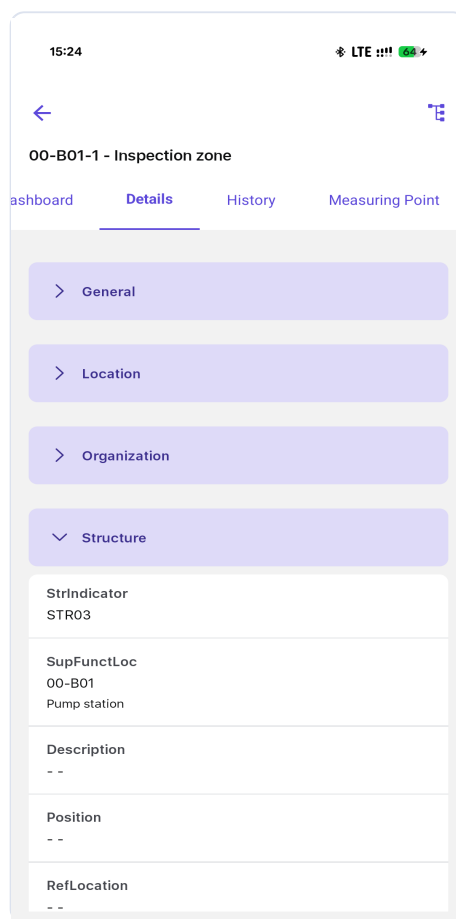
9. View Functional Location Details

Review a functional location, its hierarchy, associated equipment, documents, history, and measuring points.

Use a functional location to review maintenance information for a fixed plant location or system. Available tabs and actions depend on configuration and permissions.

1. Open **More** and select **Functional Location**.
2. Select the functional location from the list.

You can also use the available scan action when the location has a supported code.



3. Use the Hierarchy action to review parent and child locations and associated equipment when required.

Result

The selected functional location opens with the information and actions available to your role.

Review Functional Location Information

The Details area can include description, DMS attachments, directions, organization, associated equipment, structure, classification, warranty, and partner information.

1. Open the functional location **Details** tab.
2. Review the applicable information sections.
3. Open associated equipment or supporting documents when additional context is required.

Result

The functional-location master data and available supporting information are displayed.

Review Maintenance History

1. Open the available history view for the functional location.
2. Review previously associated equipment and maintenance or work-order records.
3. Open the required record for details.

Result

The selected historical maintenance record is displayed.

Review Measuring Points and Readings

Before you begin

The Measuring Points tab appears only when the module is enabled and your role has access.

1. Open **Measuring Points**.
2. Review the measuring-point ID, position, description, last reading, and available history.
3. Open the reading history or select **Take Reading** when the action is available.
4. Create a measuring point only when your role and site process permit master-data creation. See [Create a Measuring Point \(on page 85\)](#).

Result

The selected measurement history or reading-entry screen opens.

10. Settings, Help, and Profile

Manage display and language preferences, open support resources, and review your profile and session history outside the active work journey.

Use these occasional tasks to adjust how the application appears, select supported localization settings, open the Help Center, or review account and session information.

Changing a personal setting does not change the status of your work orders, operations, permits, or timesheets.

10.1. Switch between Dark and Light Modes

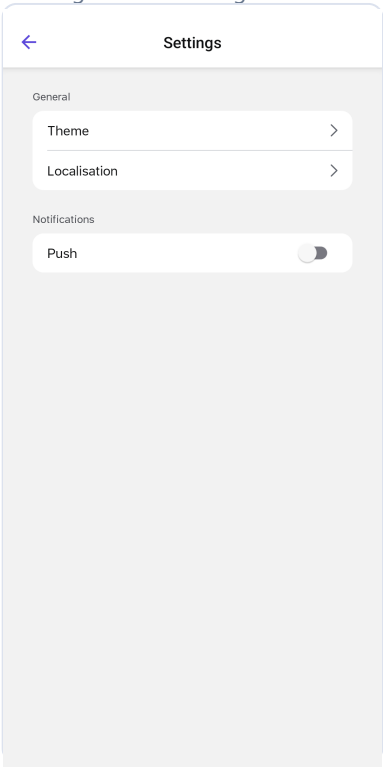
Change the application theme to match your lighting conditions or device preference.

Use the theme setting to improve visibility in different lighting conditions.

To change the mode or theme:

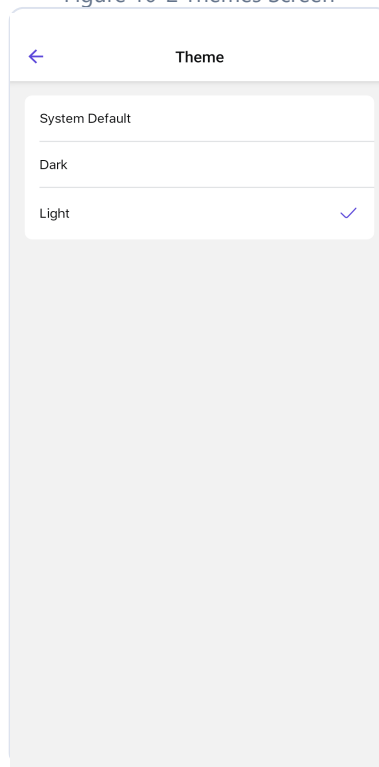
- 1. Navigate to the **More** screen and open **Settings**.

Figure 10-1 Settings Screen



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

Figure 10-2 Themes Screen



- **System Default:** Uses the device or operating-system light or dark setting. This option is selected by default.
- **Light:** Uses a light color scheme.
- **Dark:** Uses a dark, low-brightness color scheme.

Result

The selected theme is applied across the application.

10.2. Choose Language

Select the supported language and regional formats used by the application.

Select the application language from **User Preferences**. The available languages depend on the currently selected plant.

To choose a language:

1. Navigate to the **More** screen and open **User Preferences**.
2. Select the preferred language in the **Select Language** field.
3. Tap **Save** to save the preferred language.

Figure 10-3 User Preference Screen

4. Review the time zone, date and time format, currency, and decimal-unit settings associated with the selected language.

Result

The application displays supported labels, messages, and regional formats using the selected localization settings.

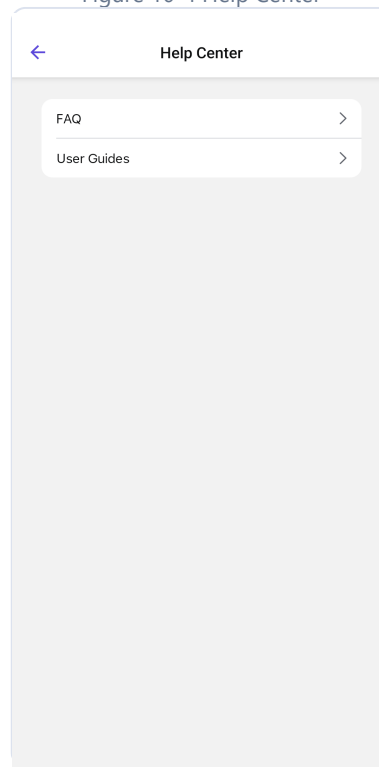
10.3. Access Help Center

Access the Help Center to view FAQs and user guides for using the application.

To access the Help Center:

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

Figure 10-4 Help Center



The Help Center provides two main topics:

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

Result

The Help Center opens with the available product documentation and support resources.

10.4. View User Profile

View your user profile to see your account details and assigned role.

To access and view the user profile:

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

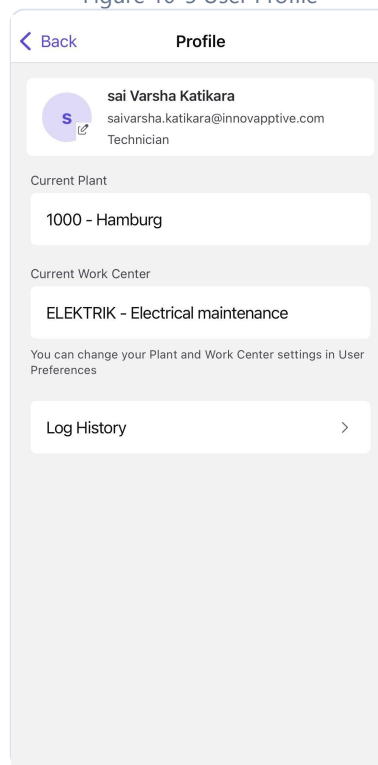
Or

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

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

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

Figure 10-5 User Profile



Result

The current user, plant, work center, and available profile details are displayed.

10.4.1. View Log History

View the Log History for a record of the actions performed during your login session.

To view log history:

1. Navigate to the **Profile** screen.

2. Tap on the **Log History** section.

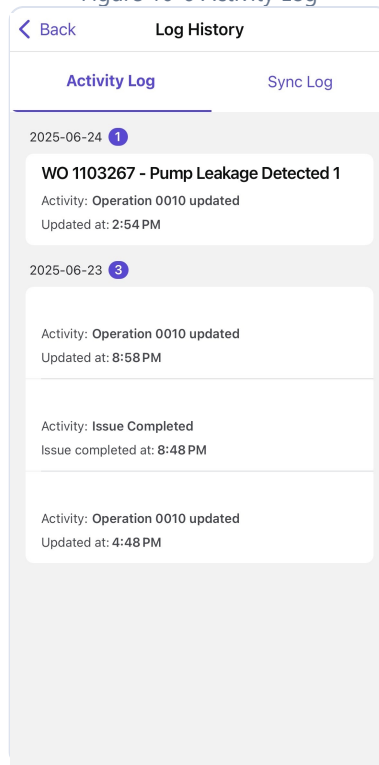
The **Log History** screen has following two tabs:

Activity Log

This tab displays a list of actions performed by the user. Each entry includes the following details:

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

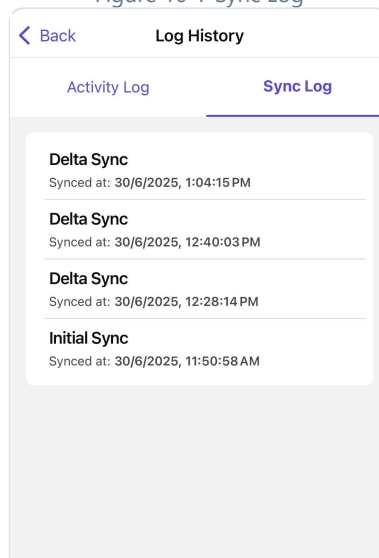
Figure 10-6 Activity Log



Sync Log

This tab displays the latest sync events and updates as soon as they occur. Logs update automatically, with no need to manually refresh the screen.

Figure 10-7 Sync Log



Result

The selected activity or synchronization history is displayed.