iMaintenance User Guide for Technicians

Connected Worker Solutions

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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 technicians in your organization. The user guide familiarizes technicians with the 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.
italic	Indicates book titles, emphasis, or placeholder variables for which you supply values.
`monospace`	Indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter

Related Products & Solutions

- Work Order Management
- Inventory and Warehouse Management
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Contents

1. Introduction to iMaintenance

Use this guide to prepare for the shift, report equipment issues, execute assigned work, and complete the required work records in iMaintenance.

iMaintenance supports the technician journey from shift preparation through work-order completion.

1. Understand the application, technician role, and current release.
2. Sign in, synchronize assigned records, and report new equipment problems.
3. Review the configured safety and job prerequisites before starting work.
4. Perform, record, confirm, and complete the assigned work.

After reviewing this orientation, continue to Get Started with the Application *(on page 10)*.

1.1. Overview of iMaintenance Application

iMaintenance is a mobile-first work order management application for Technicians to view, execute, and complete 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.
- The issue is routed for review so it can be assessed and actioned.

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 Technicians

See how iMaintenance helps technicians find assigned work, review job requirements, record execution, and report additional problems from the field.

For **Technicians**, iMaintenance provides essential tools to manage their daily tasks efficiently:

- **Execute Work Orders:** Access assigned work orders and operations, initiate job activities, and complete maintenance tasks.
- **Permit and Material Readiness:** Review or acknowledge required permits and collect the components needed before starting work.
- **Pause & Resume Operations**: Temporarily hold operations when needed and resume work without losing progress.
- **Confirm & Track Work Completion:** Log completed tasks, track work hours, and submit progress reports.
- **Work Order Completion:** Complete assigned tasks and update the required work records.
- **Comprehensive Work Logging:** Digitally record work progress, attach supporting documents, and update task statuses for full transparency.

1.3. What's New for Technicians in iMaintenance

Review the iMaintenance features introduced in release 2608 for technicians.

New Features and Enhancements in Release 2608

Table 1-1 New Features and Enhancements in Release 2607

Execute Sub-Operations Independently Start, pause, resume, and confirm Sub-Operations independently from the parent Operation, with separate execution status and time tracking for each unit of work. For more information, see Start an Operation or Sub-operation *(on page 45)*.

Table 1-1 New Features and Enhancements in Release 2607 (continued)

Confirm Operations by Split ID Select the relevant Split ID and Capacity Category when confirming an operation divided among multiple technicians or shifts. For more information, see Operation Status, Confirmation, and Timesheets *(on page 39)*.
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 78)*.

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 finding and executing assigned maintenance work.

Start by signing in. Use the Dashboard and main screens to find assigned work, reported issues, alerts, and supporting tools. 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 24)*.

2.1. Log in to the iMaintenance Application

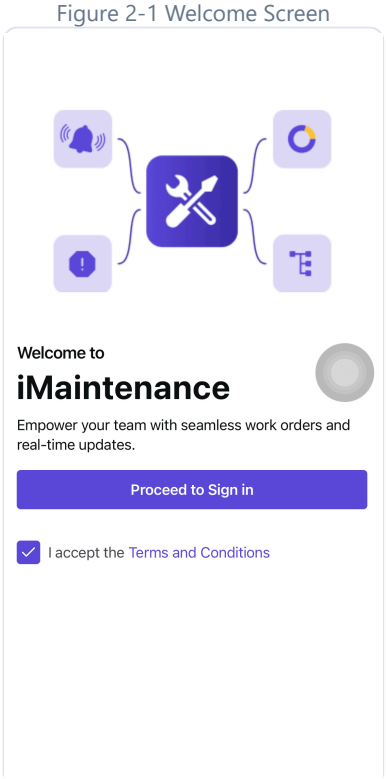
Log in to iMaintenance by entering your company domain, username, and password.

To log in to the application:

1. Open the application.

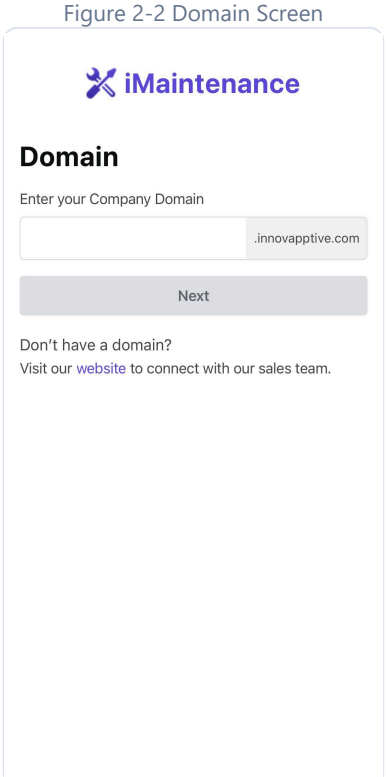
2. In the Welcome screen, accept **Terms and Conditions** and tap **Proceed to Sign in**.

Figure 2-1 Welcome Screen



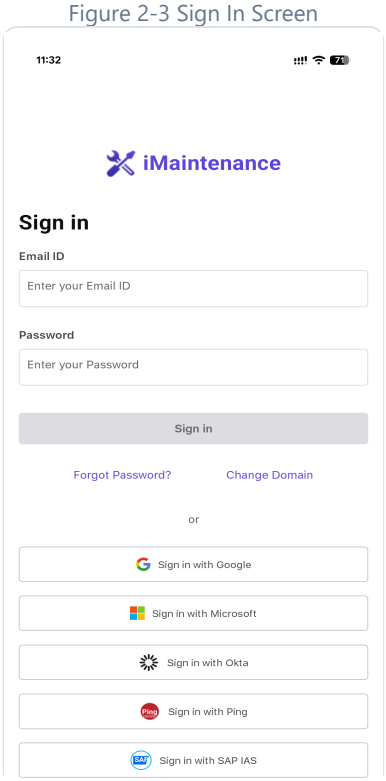
3. In the **Domain** screen, enter the company domain and tap **Next**.

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



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 12)*

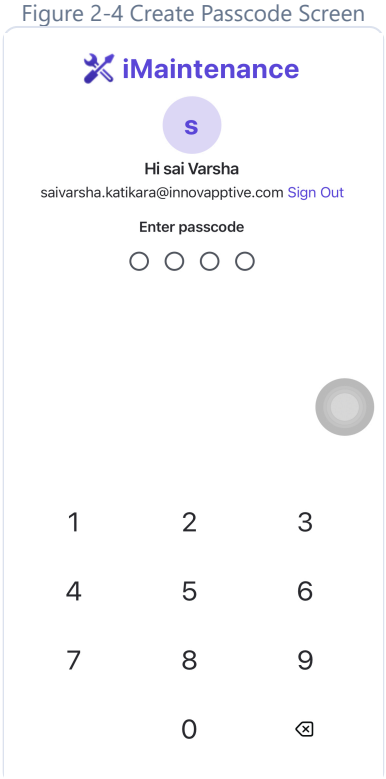
2.1.1. Create Passcode

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 14)*

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 find assigned work, reported issues, alerts, and supporting tools.

The application consists of the following screens:

- Home (Dashboard) *(on page 15)*
- Work Orders *(on page 18)*
- Issues *(on page 19)*
- Alerts *(on page 20)*
- More *(on page 21)*

2.2.1. Home (Dashboard)

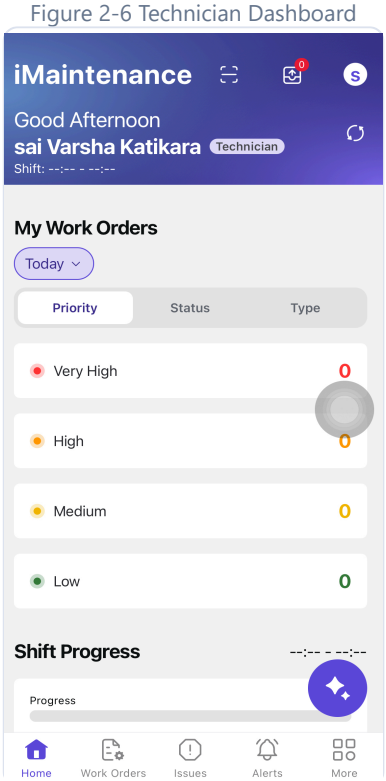
The Home (Dashboard) screen shows your assigned work orders, issues, and alerts in one place.

Technician Dashboard

After logging in, you'll see the Home screen—your main dashboard for managing workload, tracking progress, and accessing key actions throughout your shift.

The Technician Dashboard is divided into the following key sections:

Figure 2-6 Technician Dashboard



> **Tip:**
> Tap section headers (e.g., Work Orders, Issues) to view filtered lists.

- **Header**
  - Displays the greeting, name, current date, time, and shift details (e.g., 07:00 AM – 03:00 PM).
  - The Scan  icon lets you scan the asset from the Dashboard.
  - The Outbox 

icon lets you view pending records or the transactions that are done in offline mode.
  - The Profile 

icon lets you view the personal profile details.
  - The Manual Sync  icon lets you manually synchronize your device with the SAP backend. Use this whenever you want to ensure your app is fully up to date.
  - You can apply filters to view data for:
    - Today (Default)
    - Tomorrow
    - This Week
    - Custom (specific date or date range)
- **My Work Orders**
  - Select a category from the **View by** drop-down to display interactive widgets that help you quickly identify and prioritize pending tasks:
    - **Priority**: Displays work orders grouped by priority levels — **Very High**, **High**, **Medium**, and **Low**.
    - **Status**: Displays work orders grouped by their current status — **Created**, **Released**, **In Progress**, **Completed**, and **Closed**.
    - **Type**: Displays work orders grouped by their type — **Preventive WO**, **Corrective WO**, **Breakdown WO**, and **Emergency WO**.
  - Tap any category to open a filtered list of the corresponding work orders.
- **Issues**

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

- **Shift Progress**
  - Shows a visual progress bar indicating the percentage of operations completed for the selected time period (based on the applied filter).

- **Live Status Overview**
  - Shows 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.

- **My Operations**
  - Lists high-priority operations assigned to you, showing:
    - Priority levels
    - Permit and spare part readiness
    - AI-based assistance
  - Tap **AI-Assistance** to launch SIA (Smart In-App Assistant) and view step summaries.
  - Tap **Start** to begin the task and trigger the auto-timer (if permits and parts are already collected).

> **Note:**
> This section appears only if high-priority tasks are assigned.

- **Preventive Maintenance Tasks**
  - Displays PM work orders, if assigned, with due status (e.g., Due in 2 hours or Overdue).
  - Tap Start to launch the operation and begin auto-timer (if enabled). If the timer isn't enabled, manually update the task status to In Progress.

> **Note:**
> This section is shown only when PM tasks are assigned.

- **Issues Reported by Me**
  - Lists all issues you've reported, grouped as:
    - Accepted
    - Rejected
    - Pending Review
  - Tap any category to open the Issues list with relevant filters applied.

> **Note:**
> Header filters (Today, Tomorrow, This Week) do not apply here.

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

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

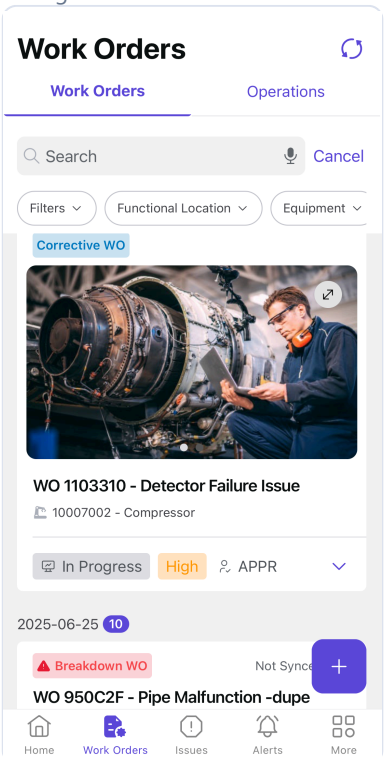
2.2.2. Work Orders

The Work Orders screen lists your 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.

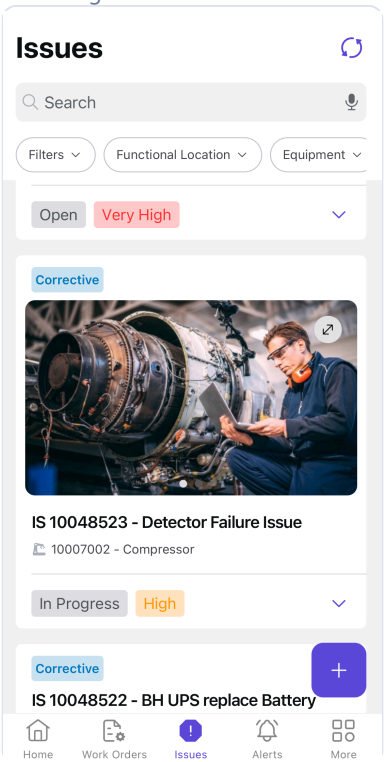
Operations

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



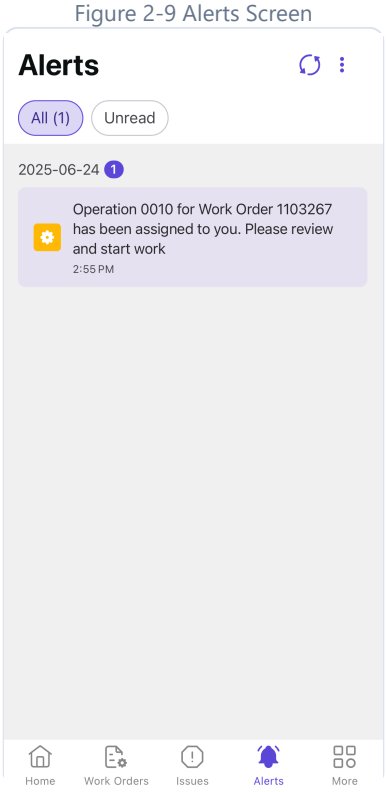
On this screen, you can:

- 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.

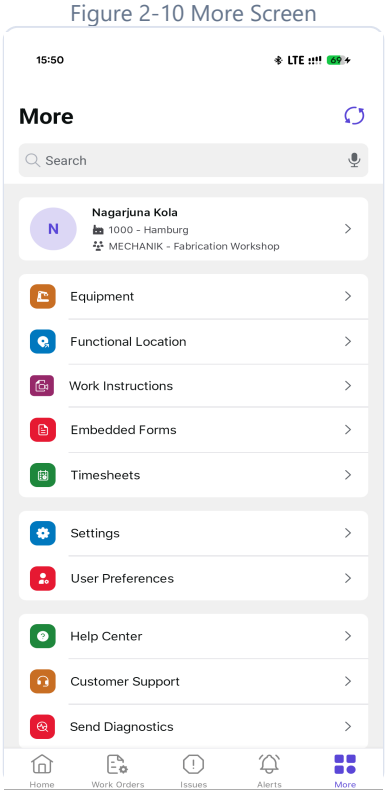
Figure 2-9 Alerts Screen



2.2.5. More

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

Figure 2-10 More Screen



On this screen, you can:

- **Manage Equipment & Locations:** Add and view equipment and functional locations.
- **Fill Out Forms:** Access embedded forms for documentation and reporting.
- **Track Work Hours:** Log 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.
	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.

Table 2-1 Buttons and Icons (continued)

Button/Icon	Name	Purpose
	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.
	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.

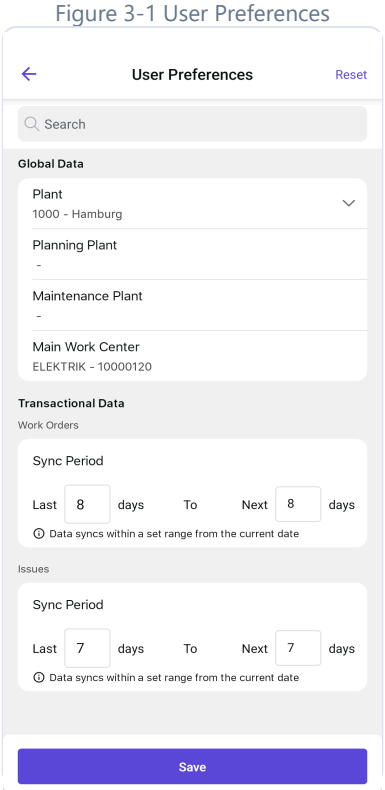
Begin by setting the synchronization scope:

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 25)*

3.1. View Push Notifications

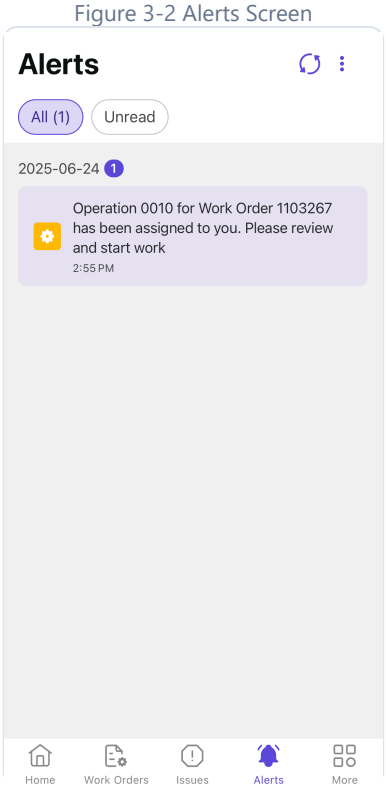
Push notifications alert you to assigned issues, task status changes, and updates from your team.

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.

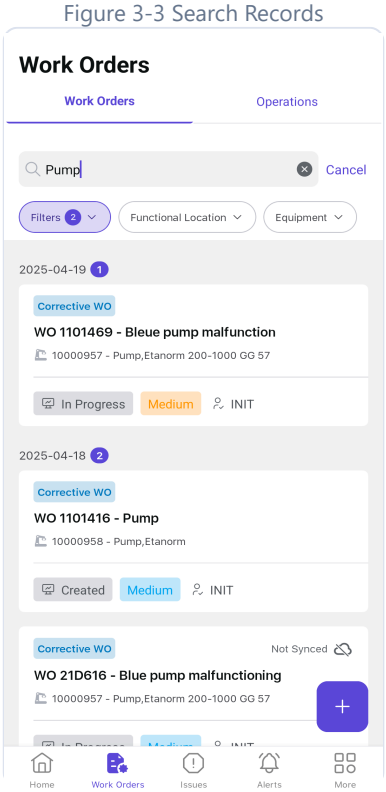
Search Records

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.

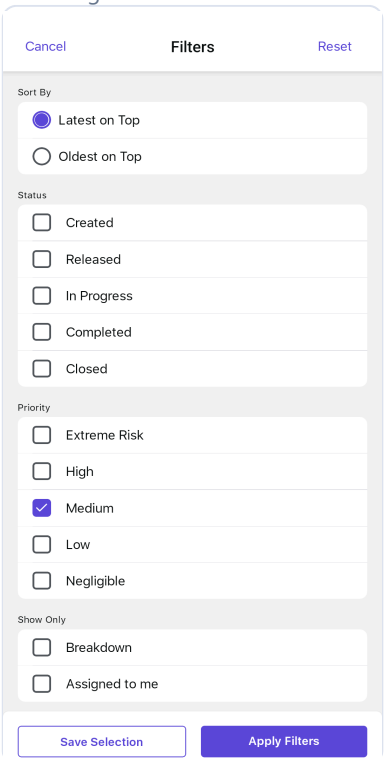
Filter Records

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



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. Create Issues for Equipment Repair or Maintenance

Report a new equipment problem, reuse a similar issue when appropriate, or correct an incorrect work-order link.

Use the path that matches the situation:

- **New problem:** Create an Issue *(on page 31)*.
- **Similar existing problem:** Create an Issue from Existing One *(on page 36)*.
- **Incorrect follow-up relationship:** Delink Work Order from Follow-up Issue *(on page 35)*.

After reporting or correcting the issue, return to assigned work unless the site process requires immediate escalation.

What Happens When You Create an Issue

When you report an issue related to an asset:

- The supervisor is notified
- The issue is reviewed, and if needed, the supervisor may:
    - Request more information
    - Inspect the equipment on-site
- Based on the assessment, the issue is either:
    - **Converted into a work order** for maintenance
    - **Rejected** if no action is required

Create Issues Faster with AI Assistance

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

- **Smart Input Assistant (SIA)**: Enter a prompt describing the issue (e.g., *"oil leak near pump"*), and the app automatically fills in related fields like equipment, functional location, and severity.
- **Image Capture**: Tap the **Camera icon** to take or upload a photo of the issue.
- **Voice Commands**: Tap the **Mic icon** and speak to report the issue. The app captures your input, adding context like timestamp and location.

4.1. Create an Issue

Report an equipment or functional-location problem using text, voice, or an image so a supervisor can assess the required action.

To create an issue:

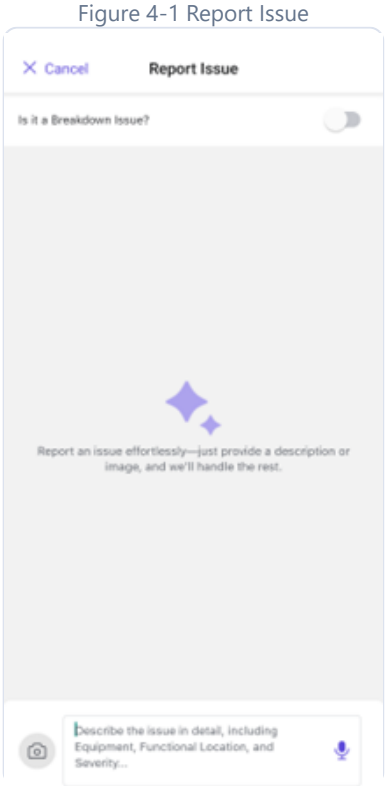
1. In the **Issues** screen, tap the Create icon.
2. In the **Report Issue** screen, use the **Smart Input Assistant (SIA)** to describe the issue.

   You can choose any of the following options:

   - **Capture an Image** using the Camera icon — the system analyzes the image and suggests issue details.
   - **Type** the issue details such as equipment, functional location, and severity directly into the AI text box.
   - **Use Voice Input** by tapping the Mic icon and speaking your description — SIA transcribes and interprets the input.

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

Figure 4-1 Report Issue



Note:

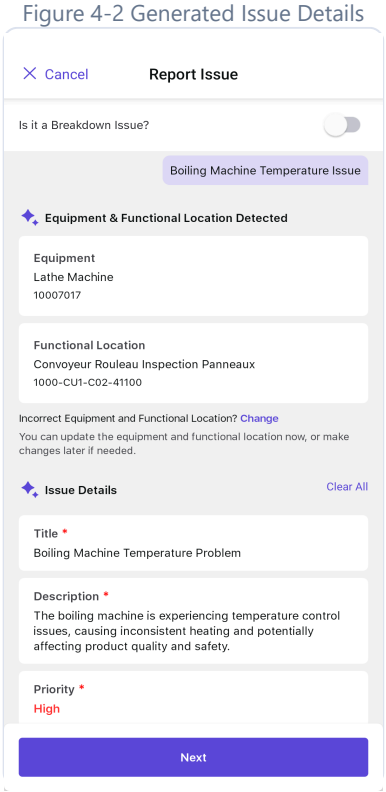
- Switch **Is it a Breakdown Issue?** toggle on top if it is an emergency issue.

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

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

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

Figure 4-2 Generated Issue Details



   - **Equipment:** The machine or asset requiring maintenance or repair.
   - **Functional Location:** The area where the equipment is located.

> **Note:**
> To change the Equipment and Functional Location details, tap **Change**.

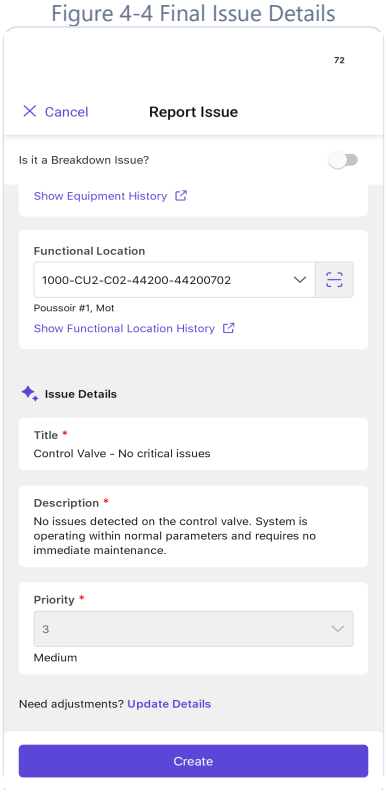
   - **Title**: Title or a brief description of the issue.
   - **Description**: A detailed explanation of the issue.
   - **User Status**: Tap to change the status of the issue—for example: **INIT**, **APPR**, **RJEC**, **CLSD**, and others.
   - **Maintenance Plant**: Populates based on the selected Equipment or Functional Location.
   - **Planning Plant and Planning Group**: Populate automatically based on the rules.
   - **Code Group**: Displays the issue category (e.g., *Reactor*).
   - **Code**: Shows the reason within the category (e.g., *Reactor Corrosion*).

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

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

5. Tap **Create**.

Figure 4-4 Final Issue Details



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

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

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

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

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

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

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

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

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

Result

The issue is saved or reported and becomes available for supervisor review. Return to assigned work unless the site process requires immediate escalation.

Next action

Next: Return to assigned work-order execution. *(on page 38)*

4.2. Delink Work Order from Follow-up Issue

Delink a work order when a follow-up issue was associated with the wrong job; the issue itself remains available.

To delink an issue from a work order:

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

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

Result

The work order is delinked, both records remain available, and the Issue status changes to Released. Return to the issue or work order you were reviewing.

4.3. Create an Issue from Existing One

Use Duplicate to create a new issue from an existing one instead of creating one from scratch.

Use the **Duplicate** option to copy an existing issue and create a new one with minor edits, instead of entering the same details again.

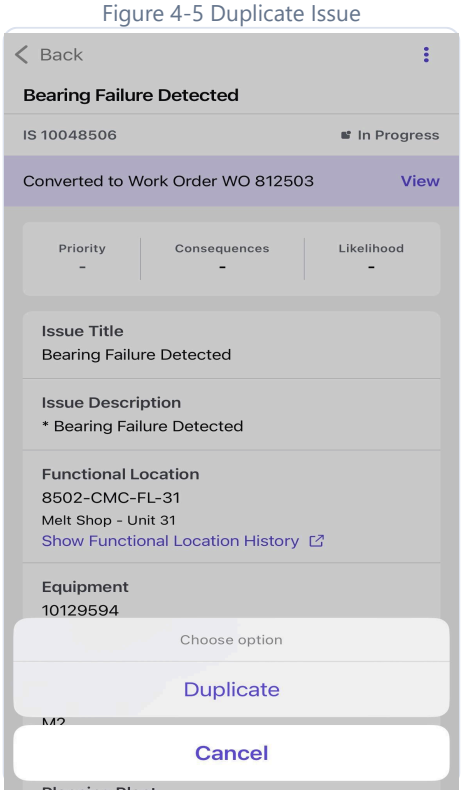
To create an issue from an existing issue:

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

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

Figure 4-5 Duplicate Issue



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

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

Result

A new issue is created with copied details for review and correction. Submit it for supervisor review, then return to assigned work.

Next action

Next: Return to assigned work-order execution. *(on page 38)*

5. Execute a Work Order

Review the configured safety and job prerequisites, perform the assigned operations, record the work, and complete the work order.

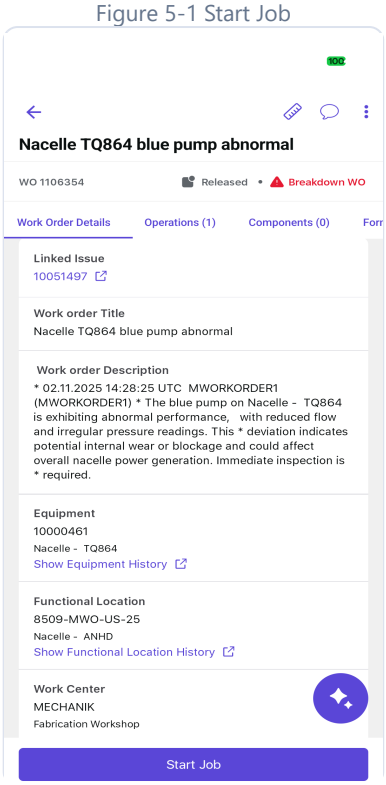
> **Note:**
> The tabs and prerequisite actions available for a job depend on your organization's configuration and enabled iCWP products. A tab that is not shown may not be required for that work order.

If you're unsure how to proceed, **AI Assist** reviews the work order details and suggests possible fixes based on similar past issues.

To start execution:

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

Figure 5-1 Start Job



Result

The work order is open for execution. Continue through the execution flow in the following order:

1. Review operation status, confirmation, and time-recording behavior.
2. Complete the permit, JHA, Work Instruction, and component prerequisites that are shown for the job.
3. Start the assigned operation.
4. Perform the work and complete configured forms, measurements, evidence, or follow-up actions.
5. End and confirm the operation, surrender the permit when applicable, submit time, and complete the work order.

Use pause, resume, bulk confirmation, attachments, follow-up issues, emergency work, feedback, and synchronization recovery only when the situation requires them.

Next action

Available actions during execution:

- **Measuring Point**  **icon** — View and add the measuring point details.
- **More**  **icon** — Edit the work order, raise a breakdown work order, raise a follow-up issue, duplicate work order, or create a sub-work order.
- **Chat**  **icon** — Message team members, share files, and use @mentions.

Navigation tabs:

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

5.1. Operation Status, Confirmation, and Timesheets

Understand the difference between an operation's status, its confirmation, work-order completion, and timesheet submission before executing operations.

Operation status reflects where the operation is in its execution lifecycle—for example, **In Progress** or **On Hold**. It changes as you start, pause, resume, or end the operation.

Operation confirmation records actual time and details against the operation, such as the technician, actual start and end time, and comments. Operation confirmation and timesheet submission are independent actions.

Confirming Split Operations Some operations are divided into splits so multiple technicians can work on the same operation at once, or across shifts. If your operation has splits, select the relevant Split ID when you confirm your portion.

Work-order completion is performed after the assigned operations are finished. If pending operations or tasks remain, the application displays an alert when you select **Complete Work Order**.

Timesheet submission logs the time worked. It can be **partial** when more work remains or **final** when no work remains.

Final Confirmation and **No Remaining Work** are the checkboxes used to mark a timesheet submission as final rather than partial. Select both only when you are the last technician completing the operation.

The auto timer tracks active working time on an operation. If the auto timer is disabled for your organization, enter the work time manually when submitting a timesheet.

Next: Before starting, review the configured safety and job prerequisites. *(on page 40)*

5.2. Acknowledge the Permit for Your Job

Review and acknowledge an issued permit before starting the applicable work.

The permit must already be issued and linked to the work order or operation. Permit creation, review, authorization, and issue are performed through iPermits by users with the applicable roles.

> ⚠ **Warning:**
> Do not begin permitted work until you have reviewed the permit, linked JHA, hazards, controls, validity, and required PPE and completed the mandatory acknowledgement.

1. Open the assigned work order.
2. Open the **Permits** tab.
3. Select the issued permit.
4. Review the scope, validity, hazards, controls, JHA, PPE, and mandatory questions.
5. Tap **Add Signature**.
6. Add your signature and confirm the acknowledgement.
7. Verify that the acknowledgement status is recorded.

Result

Your permit acknowledgement is recorded. Complete the remaining required checks before starting the work.

For the complete permit workflow, see Acknowledge the Permit *(on page)*.

Next action

Next: After completing the required prerequisites, start the assigned operation. *(on page 45)*

5.3. Review the Linked JHA

When a Job Hazard Analysis (JHA) is linked to your work order or operation, review and acknowledge it before you begin work.

Before you begin

A JHA appears only when one has been raised and linked to your work order or operation by a Supervisor or Safety team member. If no JHA is linked, this step does not apply to your job.

The JHA identifies the job steps, hazards, and required control measures for the work you are about to perform. You must not begin the operation before completing the required acknowledgement.

1. Open the linked JHA from the work order or operation.
2. Review the job steps, hazards, and control measures.
3. Complete the work acknowledgement.

   The full acknowledgement procedure — including how to submit, review, and confirm your acknowledgement — is documented in the iPermits guide. See Work Acknowledgement *(on page)*.
4. If any information on the JHA appears incorrect, do not proceed.

   Report the discrepancy using your organization's escalation method (contact your Supervisor or Safety contact) before starting the operation.

Result

Once acknowledgement is complete for all assigned team members, the operation becomes available to start. The operation must not begin before this acknowledgement is recorded.

Next action

Next: After completing the required prerequisites, start the assigned operation. *(on page 45)*

5.4. Read the Work Instruction Before You Start

When a work-order-level Work Instruction is attached to your job, review it before starting any operation.

Before you begin

This step appears only when Digital Work Instructions (DWI) is integrated with your iMaintenance implementation and a work-order-level instruction has been attached. If no **Work Instructions** tab appears on the work order, this step does not apply.

A work-order-level instruction applies to the entire job — prerequisites, required tools, PPE, and general warnings before any operation begins.

1. Open the **Work Instructions** tab on the assigned work order.
2. Review prerequisites, required tools, PPE, warnings, and general instructions.
3. Download any linked media before entering an area with no network connectivity.

   See Download Work Instructions from Module *(on page)* in the DWI Technician guide for the full offline-download procedure.
4. Return to the work order once you have reviewed the instruction.

   The full procedure for opening, navigating, and downloading a work-order-level instruction is documented in the DWI Technician guide. See Access Instructions at Work Order Level *(on page)*.

Result

Reviewing the instruction does not change the work order's status. Start the operation from the work order once you have completed this review.

Next action

Next: After completing the required prerequisites, start the assigned operation. *(on page 45)*

5.5. Read the Work Instruction for an Operation

When an operation-level Work Instruction is attached, review the operation-specific steps before starting that operation.

Before you begin

This step appears only when an operation-level instruction has been attached. Not every operation has one.

An operation-level instruction covers only the steps specific to the selected operation, separate from any work-order-level instruction.

1. Open the operation.
2. Open **Work Instructions** for that operation.
3. Review the operation-specific steps.

   The full procedure is documented in the DWI Technician guide. See Access Instructions at Operation Level *(on page)*.
4. Return to the operation to start, pause, resume, or complete the work.

Result

Reviewing the instruction does not change the operation's status.

Next action

Next: After completing the required prerequisites, start the assigned operation. *(on page 45)*

5.6. Collect Components

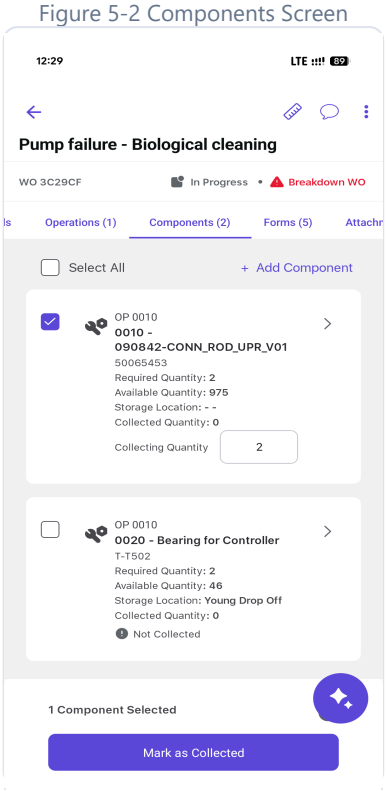
Collect the components required for a work order by scanning QR codes or checking inventory stock.

To collect components:

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

   A list of components, including the associated material, is displayed.
4. Select or scan the QR code to collect the components from the Inventory or Kitting Area.

Figure 5-2 Components Screen



5. Once the required components are collected, tap **Mark as Collected** and tap **Confirm**.

   You can view the status as **Collected**, and the green check mark appears on the QR code.

Result

The collected component quantities and status are recorded for the work order.

Next action

Next: After completing the required prerequisites, start the assigned operation. *(on page 45)*

5.7. Start an Operation or Sub-operation

After reviewing the required permit, JHA, Work Instruction, components, and forms, start the assigned operation to begin execution tracking.

See Operation Status, Confirmation, and Timesheets *(on page 39)* for how starting an operation relates to confirmation and timesheets.

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

4. Select the operation assigned to you.

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

5. To start the **Operation**:

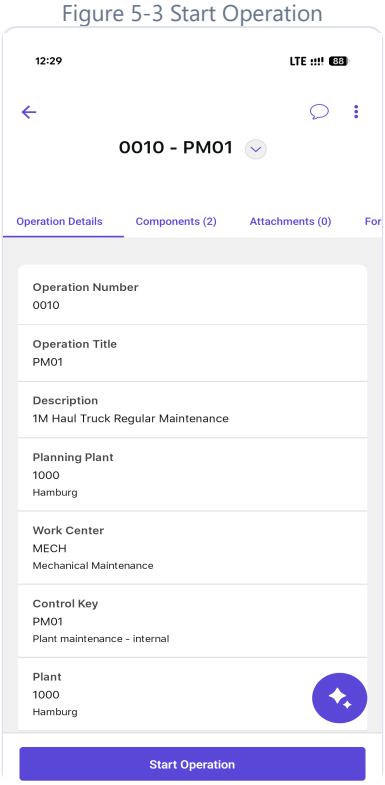
    a. .

    b. .

    a. Select the Operation assigned to you.

    b. Tap **Start Operation**.

Figure 5-3 Start Operation



6. To start a **Sub-Operation**:

    a. Tap Sub-Operations.

    b. Select the Sub-Operation assigned to you.

    c. Tap **Start Operation**.

Result

The operation or sub-operation changes to In Progress and execution tracking begins. Perform the assigned work and complete the records shown for the job.

Next action

Next: After performing the work and required checks, end and confirm the operation. *(on page 58)*

5.8. Capture Asset Data using Forms

Use Forms to record readings, inspection results, or equipment status while executing a work order.

To capture asset data in forms:

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

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

   In the Form Details screen, you can,

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

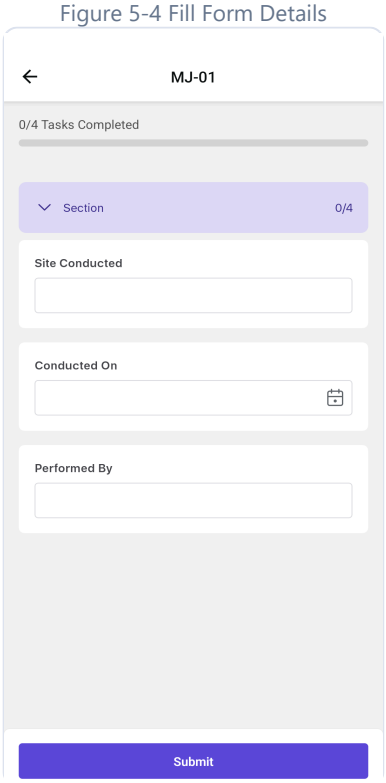
6. Fill in the form details, such as **Site Conducted**, **Conducted On**, **Start Date & Time**, **End Date & Time**, **Performed By**, and other required fields.

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

As you complete the form:

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

Figure 5-4 Fill Form Details



7. Tap **Submit**.

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

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

8. In the Success screen, you can do the following:
    - Tap **Convert to PDF** to view the form in PDF format, including images added in the Instructions type.
    - Tap **Email** to share submitted digital forms via email.
    - Tap **Print** to print the form straight from the mobile app.
    - Tap **Go to Next Form** to navigate to the next form.
    - Tap Close to navigate back to the forms list.

Result

The form response is validated and submitted or retained as a draft according to its configuration.

Next action

Next: Return to the operation and complete the remaining work before confirmation. *(on page 58)*

5.9. Pause an Operation

Temporarily stop working on an operation — for example, while waiting for tools or parts.

Pausing makes sure only your active work time is counted toward the operation.

1. Open the in-progress operation.
2. Tap **Pause**.

Result

The timer pauses and the operation changes to On Hold. Resume the same operation when the blocking condition is resolved.

Next action

Next: Resume the operation when work can continue. *(on page 49)*

5.10. Resume an Operation

Continue working on an operation that you previously paused.

Resume an operation you put on hold once you are ready to continue.

1. Open the operation that is **On Hold**.
2. Tap **Resume Work**.

Result

The timer restarts and the operation returns to In Progress. Continue the remaining work.

Next action

Next: After completing the remaining work, end and confirm the operation. *(on page 58)*

5.11. Confirm Multiple Operations at Once

Use Bulk Confirmation to log time and confirm multiple operations in a single flow.

To confirm multiple operations at once:

1. Navigate to the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Operations** tab.
4. Tap **Bulk Log** in the Operations section.

5. Choose **Select All** check box to select all the operations or select only required check boxes.
6. Tap **Log Time**.
7. In the **Log Time** screen, complete the following:
    a. Expand each operation and fill in the following details:
        - Technician
        - Data Entry Profile
        - Actual Start Time
        - Actual End Time
        - Total Duration
        - Comments
        - No Work Remaining
        - Final Confirmation
    b. Tap **Mark as Completed**.

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

Result

Eligible operations are confirmed using the selected common values; ineligible operations remain unchanged.

Return to the work order and complete any remaining operations, prerequisites, and records.

Next action

Next: Return to the Work Order Execution journey. *(on page 38)*

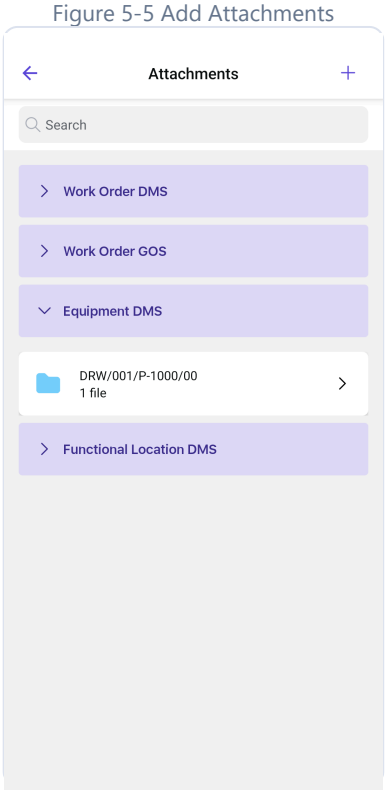
5.12. Add Attachments

Attach photos, videos, PDFs, or voice recordings to document the work performed on a task.

To add attachments:

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

Figure 5-5 Add Attachments



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

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

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

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

7. Tap **Save**.

Result

The attachment is saved at the selected work-order, operation, or form destination.

Next action

Next: Return to the operation and complete the remaining work before confirmation. *(on page 58)*

5.13. Report a Follow-up Issue

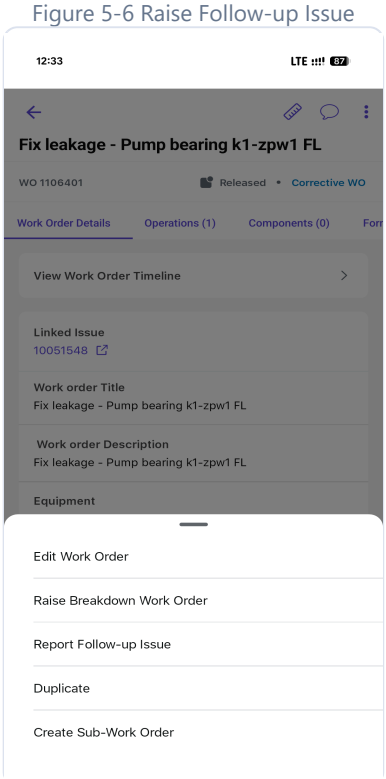
Report an additional problem found during a work order without leaving the current screen.

Use the **Report Follow-up Issue** option to log a new problem you notice while working on a work order.

For example, while replacing a pump motor, you notice that the nearby pipe has a small leak. You can log it as a follow-up issue on the spot instead of noting it down to report later.

1. Open the work order.
2. Tap the More icon in the top-right corner.
3. Select **Report Follow-up Issue**.

Figure 5-6 Raise Follow-up Issue



4. In the **Report Follow-up Issue** screen, add the issue details, such as equipment, functional location, and severity, in the AI Assistant text box. For more information, see Create an Issue *(on page 31)*.

Result

The follow-up issue is created and linked to the current work order. Return to the current operation and continue work that can be completed.

Next action

Next: Return to the active work order. *(on page 38)*

5.14. View Follow-up Issues Linked to a Work Order

Review the follow-up issues that have been linked to a work order.

Once a follow-up issue has been created:

1. Return to the Work Order Details screen.
2. Tap the **Follow-up Issues** section to view linked issues.

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

Result

You can view the details of any linked follow-up issue from this screen.

Next action

Next: Return to the current work order. *(on page 38)*

5.15. Delink a Follow-up Issue

Remove a follow-up issue that was incorrectly linked to a work order.

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

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

Result

The issue is removed from the work order's Follow-up Issues list. The issue itself is not deleted.

Next action

Next: Return to the current work order. *(on page 38)*

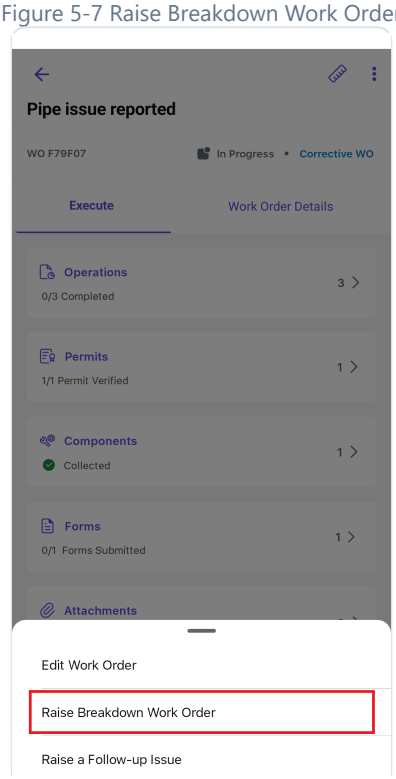
5.16. Create an Emergency Work Order

Create an Emergency or Breakdown Work Order when an asset malfunctions and needs immediate attention.

To create an emergency work order:

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

Figure 5-7 Raise Breakdown Work Order



4. In the Create Work Order screen, fill the details and submit. For information, see *Create Work Order* topic in Supervisors user guide.

Result

The breakdown or emergency work order is created from the source work order according to the available permission.

Next action

Next: After creating the emergency work order, return to the active Work Order Execution journey. *(on page 38)*

5.17. Report a Problem with a Work Instruction

If a step in a Work Instruction is unclear, incorrect, or unsafe, submit feedback directly from that step.

Feedback helps the authoring team correct or improve a published instruction. It does not change the instruction immediately.

1. Open the affected step.
2. Select positive or negative feedback.
3. Select the reason.
4. Add comments.
5. Add supporting evidence, if applicable.
6. Submit the feedback.

The full feedback procedure, including supported attachment types, is documented in the DWI Technician guide. See Provide Feedback for Work Instructions *(on page)*.

Result

Warning:

Feedback does not immediately change the published instruction. Stop and escalate through your organization's escalation method if the current instruction appears unsafe or technically incorrect — do not wait for the feedback to be reviewed.

Next action

Next: Return to the operation only when the published guidance and site conditions support continuation. *(on page 38)*

5.18. End and Confirm an Operation

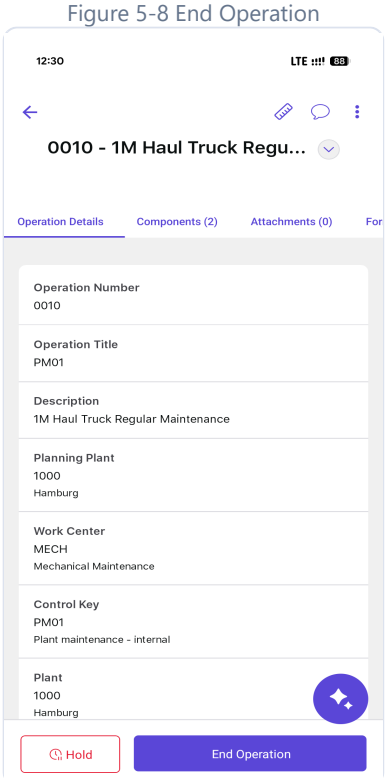
When the assigned work is complete, end the operation and confirm the execution details before submitting time.

See Operation Status, Confirmation, and Timesheets *(on page 39)* for how confirmation relates to timesheet submission and work-order completion.

1. Perform the assigned tasks for the operation.

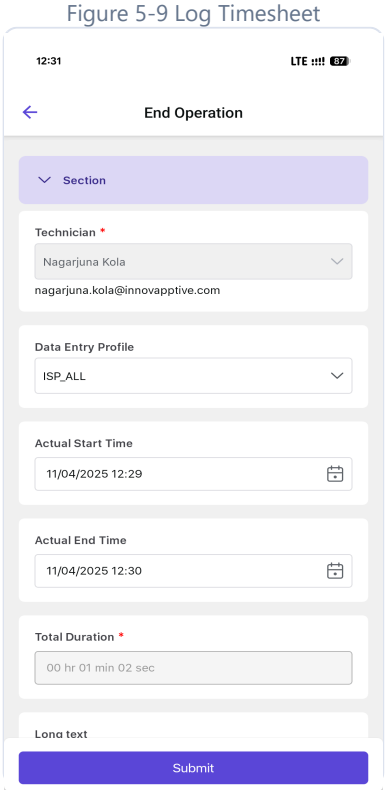
2. Tap **End Operation** once the operation is completed.

Figure 5-8 End Operation



3. In the **End Operation** screen, review and complete the following:
    a. **Technician**: Select technician from the list, if not automatically selected.
    b. **Data Entry Profile**: Select data entry profile from the list.
    c. **Actual Start Time**: Select actual start date and time.
    d. **Actual End Time**: Select actual end date and time.
    e. **Total Duration**: Default.
    f. **Comments**: Add comments if any.

Figure 5-9 Log Timesheet



4. Tap **Submit**.

If you attempt to start another operation without completing the current one, you are prompted to put the current operation on hold before proceeding.

Note:
You can confirm an operation without submitting a timesheet, or submit a timesheet without confirming the operation — these are independent actions.

Result

The operation is confirmed with the recorded execution details. Surrender the permit when applicable, then submit the recorded work time.

Next action

Next: Surrender the permit when the job used one. *(on page 61)*

5.19. Surrender the Permit

Once the permitted work is complete, surrender the permit to release it back to the Issuer.

Before you begin

The applicable operation must be complete before you surrender the permit.

Surrendering is the Permit Holder's action to hand the permit back once work is finished. It moves the permit toward closure but does not close it — closure is performed by the Issuer. See Close the Permit *(on page)* for that step.

1. Confirm the applicable work is complete.
2. Open the permit.
3. Select the surrender action.
4. Add the required signature.
5. Add comments.
6. Tap **Confirm** to surrender the permit.

Result

The permit is surrendered to the Issuer. Return to work-order execution and submit the recorded time.

Next action

Next: submit the timesheet. *(on page 61)*

5.20. Submit a Timesheet

After confirming the operation, submit the recorded work time for supervisor review.

Use partial submission when more work remains or another technician must continue. Select **No Remaining Work** and **Final Confirmation** only when you are completing the final required work according to your organization's process.

1. Submit time when ending an operation:
    a. Review the time and comments in the **End Operation** screen.
    b. Correct the time when permitted.
    c. Select the applicable partial or final confirmation fields.
    d. Tap **Submit**.
2. Alternatively, submit time later from **More** → **Timesheets**:
    a. Select the operation.
    b. Enter or correct the time.
    c. Add comments.
    d. Select the applicable confirmation fields.
    e. Tap **Submit**.

Result

The timesheet is submitted for supervisor review. Complete the work order when all required records are finished; correct and resubmit only if the timesheet is rejected.

Next action

If the timesheet is rejected, see Correct and Resubmit a Rejected Timesheet *(on page 62)*.

Next:

- Complete the work order when all required records are finished. *(on page 63)*
- Correct and resubmit the timesheet if the supervisor rejects it. *(on page 62)*

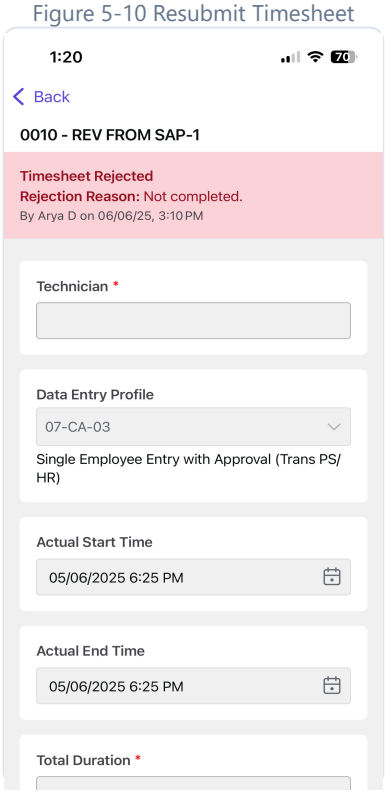
5.21. Correct and Resubmit a Rejected Timesheet

Revise and resubmit a rejected timesheet entry with comments explaining the changes.

To resubmit a rejected timesheet:

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

Figure 5-10 Resubmit Timesheet



Result

The corrected timesheet returns to the supervisor's queue. Return to the work-order completion flow.

Next action

Next: Return to work-order completion. *(on page 63)*

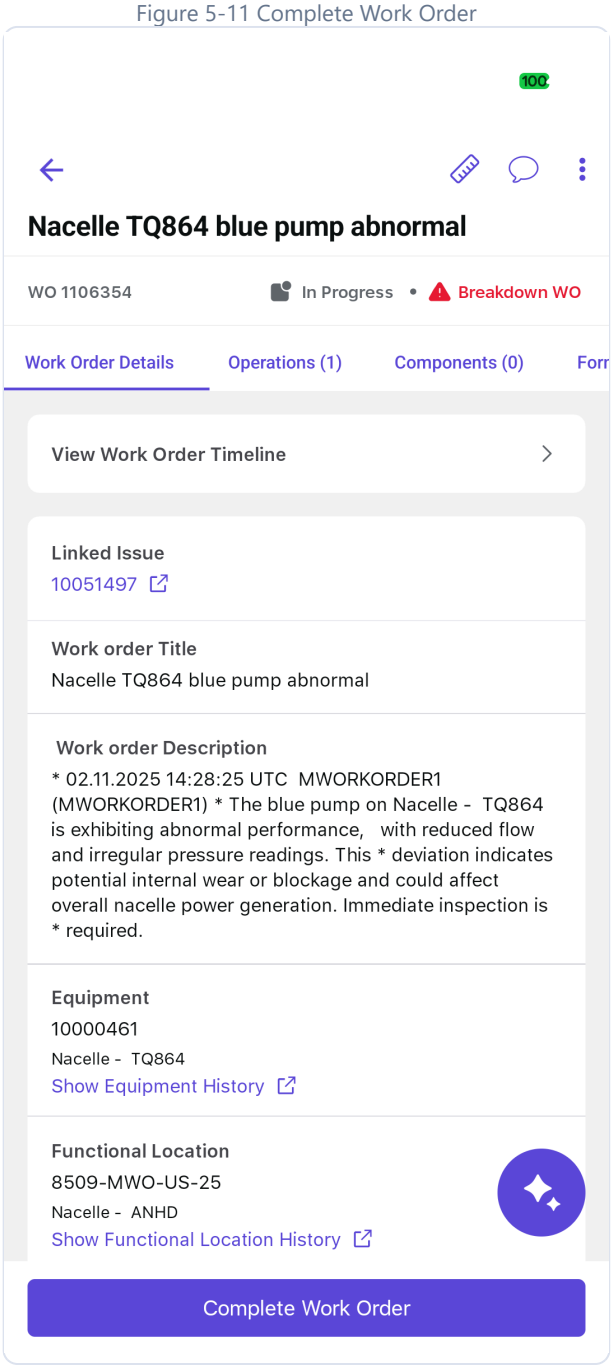
5.22. Complete a Work Order

Complete the work order after all required operations, permits, forms, components, time, and follow-up records are finished.

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

1. Open the work order.

Figure 5-11 Complete Work Order

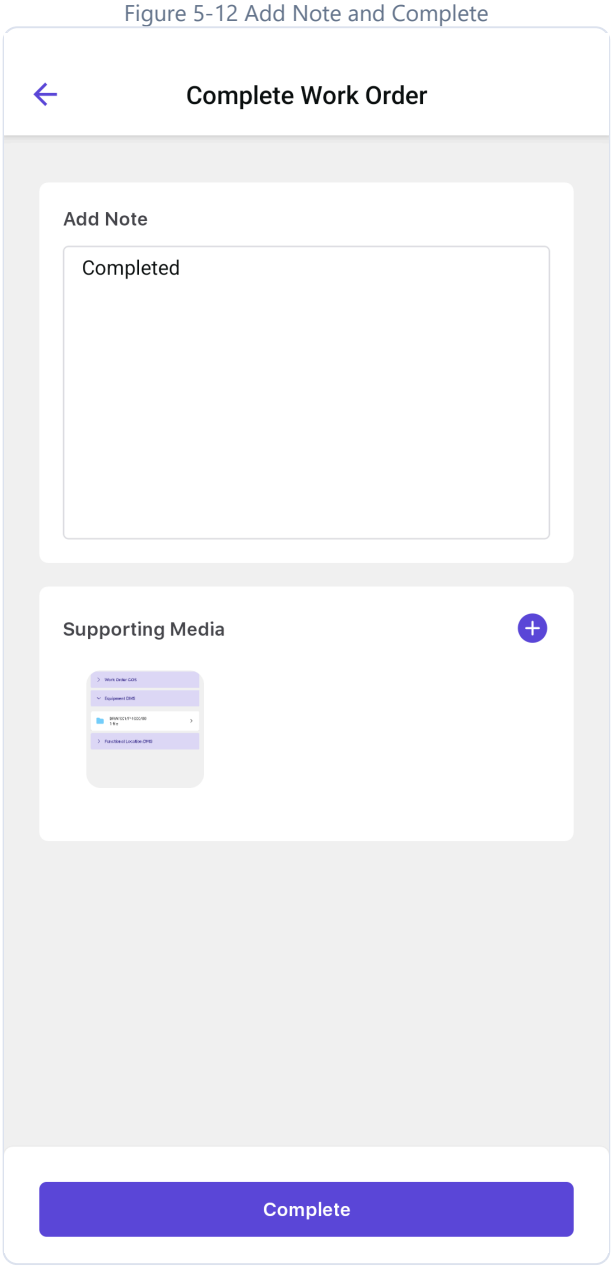


2. Tap **Complete Work Order**.

> **Warning:**
> An alert message is displayed if there are any pending operations or tasks.

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

Figure 5-12 Add Note and Complete



Result

A success message is displayed and the work-order status changes to **Completed**. The technician execution journey is complete for that work order.

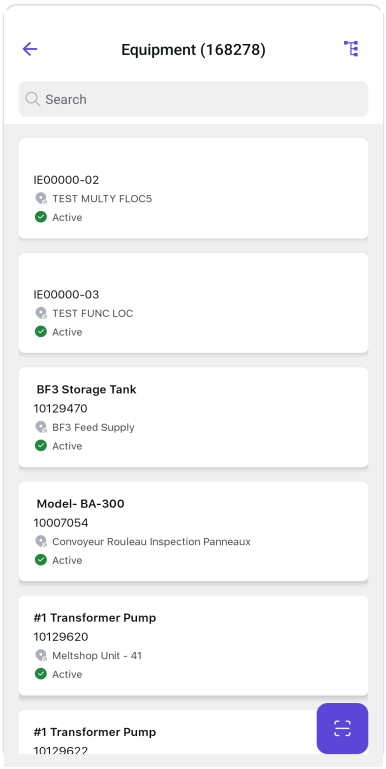
6. View Equipment Details

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 technicians. 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 report an issue, review related work, and take readings.

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 Report an Issue *(on page 31)* when a condition requires follow-up.
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 69)*.

Result

The selected measurement history or reading-entry screen opens.

6.1. Create a Measuring Point

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

To create a measuring point:

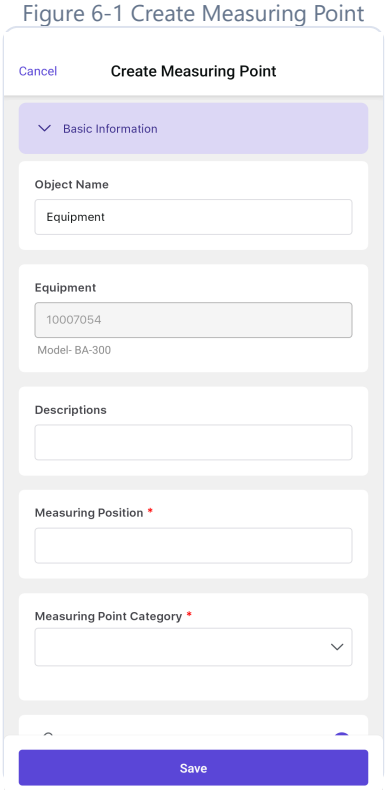
1. Navigate to the **Equipment** module.

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 6-1 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 58)*

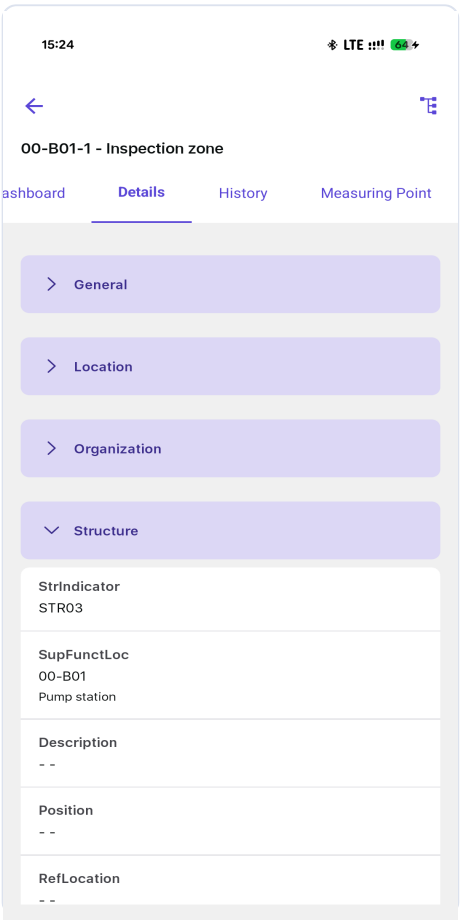
7. View Functional Location Details

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 69)*.

Result

The selected measurement history or reading-entry screen opens.

8. 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.

8.1. Switch between Dark and Light Modes

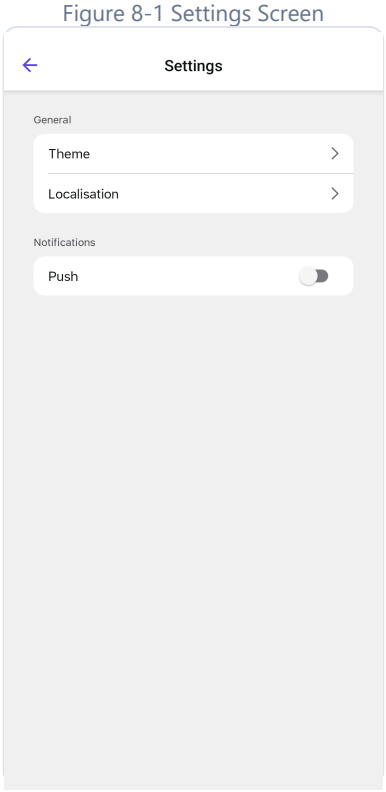
Change the application theme to match your lighting conditions or device preference.

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

To change the mode or theme:

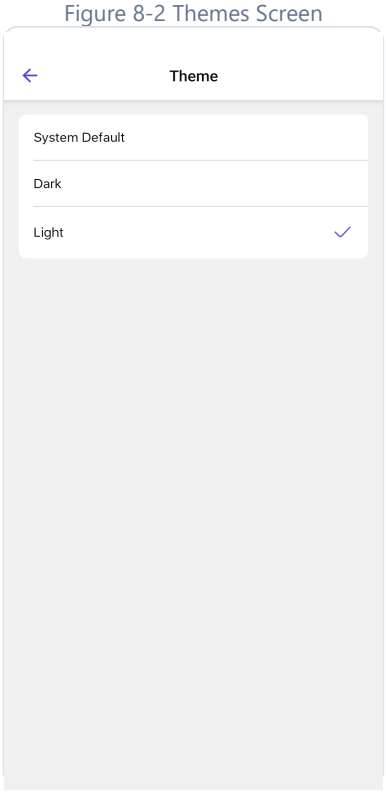
1. Navigate to the **More** screen and open **Settings**.

Figure 8-1 Settings Screen



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

Figure 8-2 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.

8.2. Choose Language

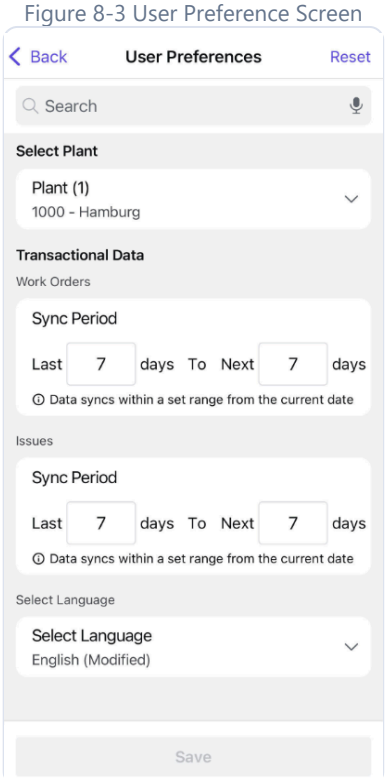
Select the supported language and regional formats used by the application.

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 8-3 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.

8.3. 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**.

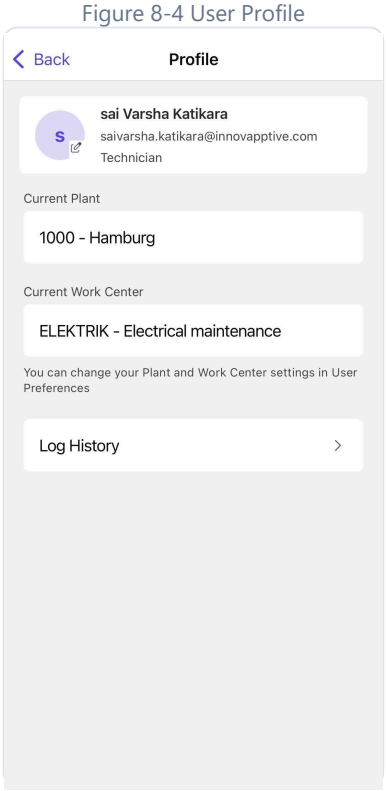
Or

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 8-4 User Profile



Result

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

8.3.1. 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.

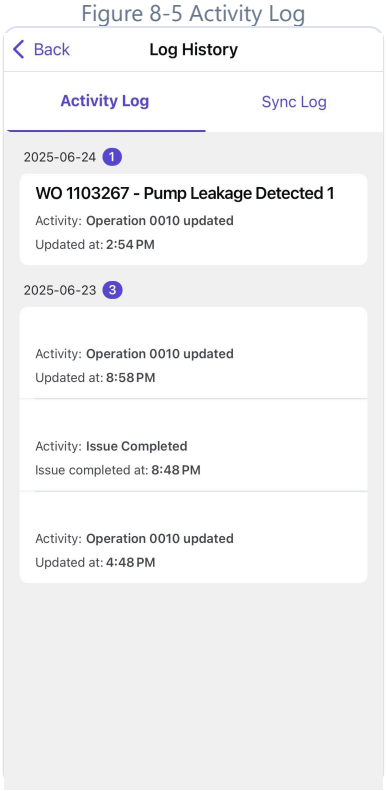
The **Log History** screen has following two tabs:

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).

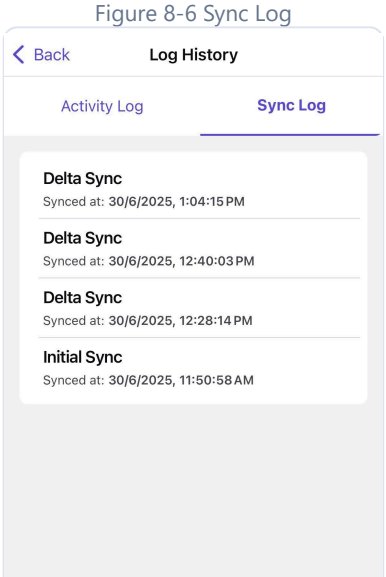
Figure 8-5 Activity Log



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 8-6 Sync Log



Result

The selected activity or synchronization history is displayed.

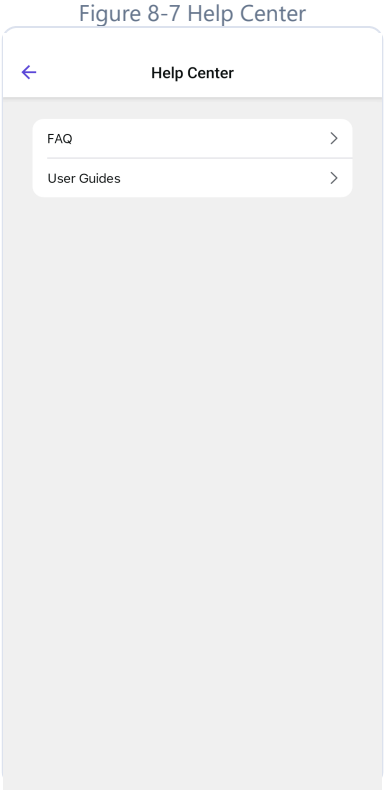
8.4. Access Help Center

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 8-7 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.