

iMaintenance Configuration Guide

Connected Worker Solutions



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

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Preface

Identify the intended readers, document conventions, related products, and documentation contacts.

Intended Audience

This configuration guide is for administrators and functional leads who manage iMaintenance settings, users, roles, master data, forms, and templates. IT administrators and implementation engineers use the tenant onboarding, authentication, and database configuration chapters. Supervisors can refer to the sections on assigning work in the Maintenance Control Center and reviewing issues.

If you execute work in iMaintenance, such as completing Work Orders, filling in forms, or reporting issues, see the iMaintenance user guides.

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](#)
- [Analytics and Dashboards](#)

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I. Get Started with iMaintenance Configuration

Understand the configuration scope, sign in, and find the modules and settings available to you.

Chapters

- [Introduction \(on page 10\)](#)
- [Log In and Navigate \(on page 15\)](#)

1. Introduction

Use this guide to set up iMaintenance for your organization after it is deployed, so that it matches your business processes, plants, and teams.

The guide covers tenant access, users and roles, master data, ERP integration, product settings, Work Orders, the Maintenance Control Center, Issues, equipment and functional locations, measuring points, forms, field templates, risk evaluation, localization, mobile preferences, chat and notifications, AI features, dashboards, and reports.

With this guide, you can:

- **Set up the foundation:** onboard your tenant, configure authentication, and set up users and master data.
- **Control product behavior:** decide which modules are available, how Work Orders and Issues behave, and how AI, timers, and measuring points are applied.
- **Connect to your ERP:** set up the ERP connection, map ERP statuses and priorities, and tune synchronization.
- **Design data capture:** build forms, create field templates in RACE, and define risk matrices.
- **Report on results:** configure dashboards and reports that show operational data to supervisors and managers.

How settings are changed

iMaintenance settings are changed in one of three ways:

- **In the web application:** administrators manage users, roles, master data, forms, field templates, risk matrices, localization, platform settings, and dashboards directly in the web application.
- **In your identity provider:** IT administrators register iMaintenance with Azure or Okta and supply the tenant onboarding details.
- **In the database:** product settings such as module availability, Work Order controls, ERP mappings, and AI enablement are stored as configuration documents in the database. Your IT or implementation team applies these changes. For how these documents are organized, see [Configure Shared Product Settings \(on page 79\)](#).

Each chapter states which method applies.

1.1. About the Configuration Platform

Administrators use the iMaintenance web application to manage users, roles, master data, forms, templates, and platform preferences. Other product settings are stored in the database or set up in your identity provider.

Functional administrators define the required behavior. They configure the available web settings and work with IT or implementation teams on database and identity-provider settings, so that technicians and supervisors get the same experience in the field.

What you can do here:

- **Manage Core Modules:** Enable or disable Issues, Work Orders, and Timesheets at tenant or plant level.
- **Control Work Order Behavior:** Auto timers, raise issue at submission, follow-up issues, operation confirmation, completion controls, tabs, timeline, RCA, and measuring points.
- **Design Data Capture:** Build forms and templates, add conditional logic, field rules, and validations.
- **Assign by Hierarchy:** Map forms and settings to plants, locations, units, or teams.
- **Set Global Defaults:** Session timeout, chat, attachments, list views, and ERP key mappings.
- **Administer Access:** Create users and groups, assign roles and permissions, and control access.
- **Connect Systems:** Configure ERP connections and synchronization settings.
- **Publish Insights:** Configure dashboards and reports used across the organization.

Who should use this

- **Functional Administrators:** primary audience. They own templates, module controls, business rules, and access policies.
- **IT and implementation teams:** apply settings stored in the database, set up SSO and identity providers, and handle transport and security steps documented in the **Deployment & Setup Guide**.
- **Supervisors:** use the Maintenance Control Center and Issue review sections, which are marked as supervisor reference.

"

If you execute work (create or complete Work Orders, inspections, timesheets), see the **User Guides**.
If you set up how iMaintenance works, you are in the right place.

"

1.2. What's New for Configuration

Review the iMaintenance configuration features and newly documented settings, by release.

New Features and Enhancements in Release 2609

Work Order Completion, Tabs, Timeline, and Timesheets

Configure whether a Work Order can be completed while forms or operations are still open, which tabs appear on the Work Order and Operation screens, whether the Work Order timeline is shown in the mobile app, and Timesheet processing.

For more information, see:

- [Configure Work Order Completion Controls \(on page 96\)](#)
- [Configure Work Order and Operation Tabs \(on page 97\)](#)
- [Configure the Work Order Timeline \(on page 100\)](#)
- [Configure Timesheets \(on page 104\)](#)

Assignment Levels and Technician Lists

Configure header-level and operation-level assignment, the control keys that operation assignment is limited to, and where technician lists come from.

For more information, see:

- [Configure Work Order Assignment Levels \(on page 110\)](#)
- [Configure Technician Lists for Assignment \(on page 111\)](#)

Issue Tabs and Issue Slip

Configure which tabs appear on the Issue detail screen and turn the customer-specific Issue Slip on at tenant or plant level.

For more information, see:

- [Configure Issue Tabs \(on page 116\)](#)
- [Configure the Issue Slip \(on page 118\)](#)

Branding, Navigation, SSO Session Checks, and List Pagination

Set the tenant logo, the navigation modules shown in the web application, SSO session-limiting checks for web and mobile, and Issue and Work Order list pagination.

For more information, see:

- [Configure Tenant Branding \(on page 84\)](#)
- [Configure Navigation Modules \(on page 81\)](#)
- [Configure SSO Session Checks \(on page 37\)](#)
- [Configure List Pagination \(on page 91\)](#)

ERP Synchronization Settings

Configure the full ERP key mapping, time zone mapping for confirmations, SAP inbound batch sizes, and plants excluded from initial synchronization.

For more information, see:

- [Configure Innovapptive Key Mapping \(on page 57\)](#)
- [Configure Time Zone Mapping for Confirmations \(on page 65\)](#)
- [Configure SAP Inbound Synchronization \(on page 71\)](#)
- [Exclude Plants from Initial Synchronization \(on page 72\)](#)

Notifications, Assets, AI, and Asset360

Configure sync-failure push notifications, asset visibility by SAP status, Google Maps and geo-tag actions, the AI Detect threshold and AI service endpoints, risk matrix priority colors, and the Asset360 No Priority entry.

For more information, see:

- [Configure Sync-Failure Push Notifications \(on page 182\)](#)
- [Configure Asset Visibility by SAP Status \(on page 123\)](#)
- [Configure the Map Feature \(on page 124\)](#)
- [Configure Geo-Tag Actions \(on page 125\)](#)
- [Configure the AI Detect Confidence Threshold \(on page 186\)](#)
- [Configure AI Service Endpoints \(on page 187\)](#)
- [Configure Risk Matrix Priority Colors \(on page 171\)](#)
- [Configure the Asset360 No Priority Entry \(on page 196\)](#)

User Onboarding and Roles Tabs

Configure the bulk user upload flow, allowed email domains, and which Roles and Permissions tabs appear for each product.

For more information, see:

- [Configure User Onboarding Controls \(on page 46\)](#)
- [Configure Roles and Permissions Tabs \(on page 47\)](#)

New Features and Enhancements in Release 2608.01

Configurable Work Order Movement on MCC Kanban Board

Admins can now configure how work order cards move across MCC Kanban sections (Unassigned, Assigned, In Progress, Completed) based on System Status, Assignment, and User Status — instead of relying only on hardcoded logic.

For more information, see [Configure MCC Kanban Movement Rules \(on page 107\)](#).

Refreshed Master Data Experience

Access Plants, Locations, Assets, Shifts, Units of Measurement, and Global Response Sets through the refreshed Portal experience.

For more information, see [Maintain Master Configurations \(on page 49\)](#).

2. Log In and Navigate

Sign in to the iMaintenance web application, recover access if you cannot sign in, and find your way around the platform.

- [Log in to Application \(on page 15\)](#)
- [Navigate to the iMaintenance Configuration \(on page 17\)](#)

2.1. Log in to Application

Sign in with the login method enabled for your organization and recover access when you cannot sign in.

Related tasks

- [Log in to Platform Application \(on page 15\)](#)
- [Troubleshoot Login Issues \(on page 16\)](#)

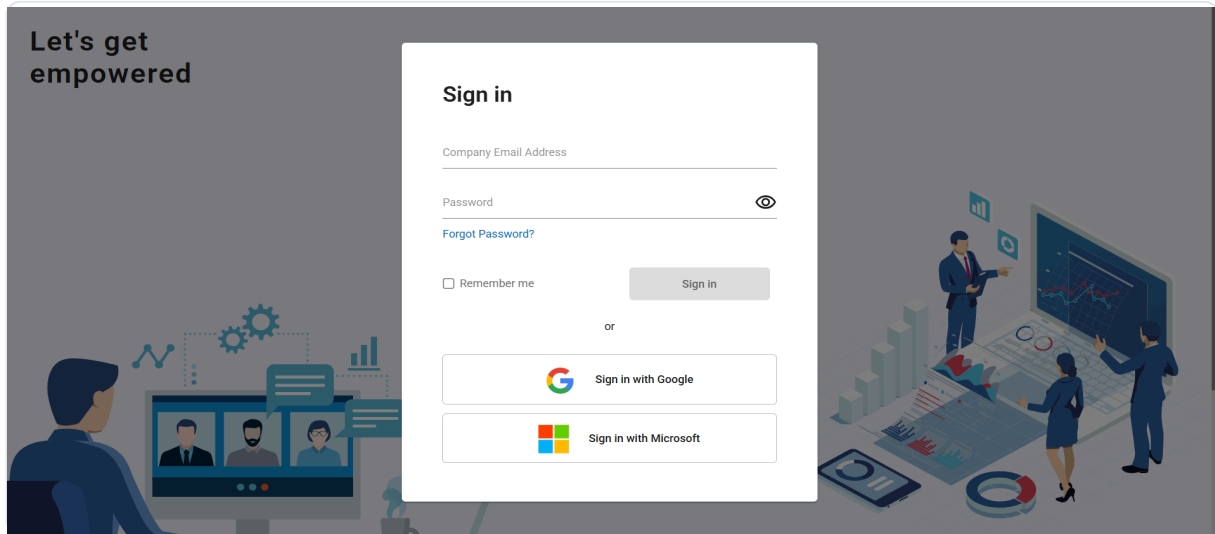
2.1.1. Log in to Platform Application

Sign in with your organization email and password or an enabled single sign-on provider.

Basic Authentication

Use your company registered email and password to log in.

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



Single Sign-On (SSO: Google or Microsoft)

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

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



Note:

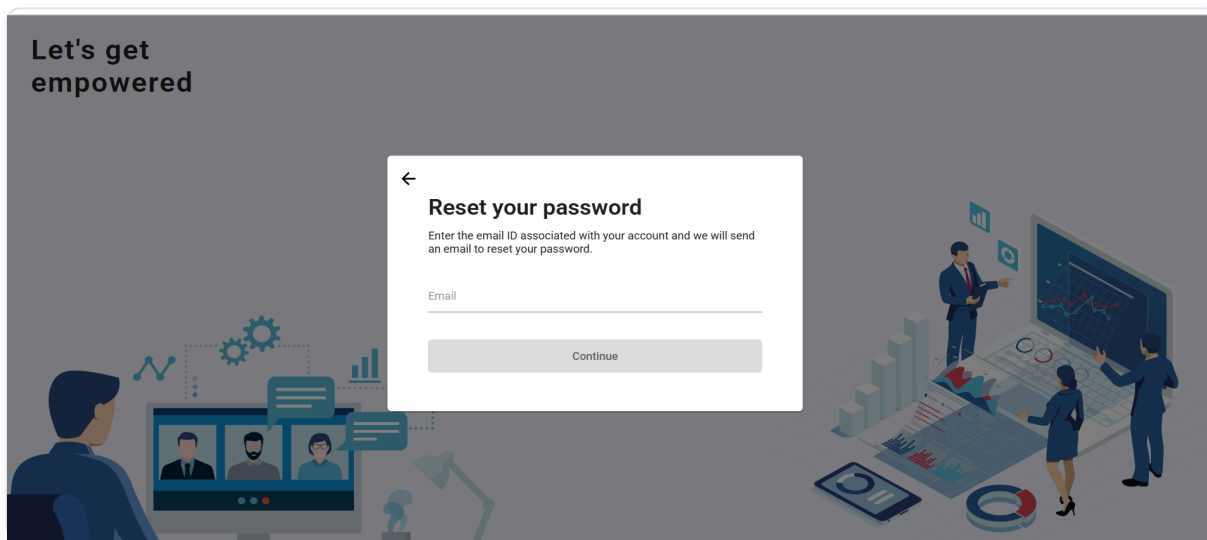
If this is your first time, the same button completes your sign-up process. If your browser has saved Google or Microsoft accounts, they will appear automatically for quicker selection.

2.1.2. Troubleshoot Login Issues

Reset a forgotten password with your registered email. If two-factor authentication is enabled, verify using the code sent to your phone.

If you forget your password:

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



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

2.2. Navigate to the iMaintenance Configuration

Find modules, menus, and workspace controls in the iMaintenance web application.

Related tasks

- [Explore the Home Screen \(on page 17\)](#)
- [Access Modules \(on page 18\)](#)
- [Understand the Platform Layout \(on page 18\)](#)

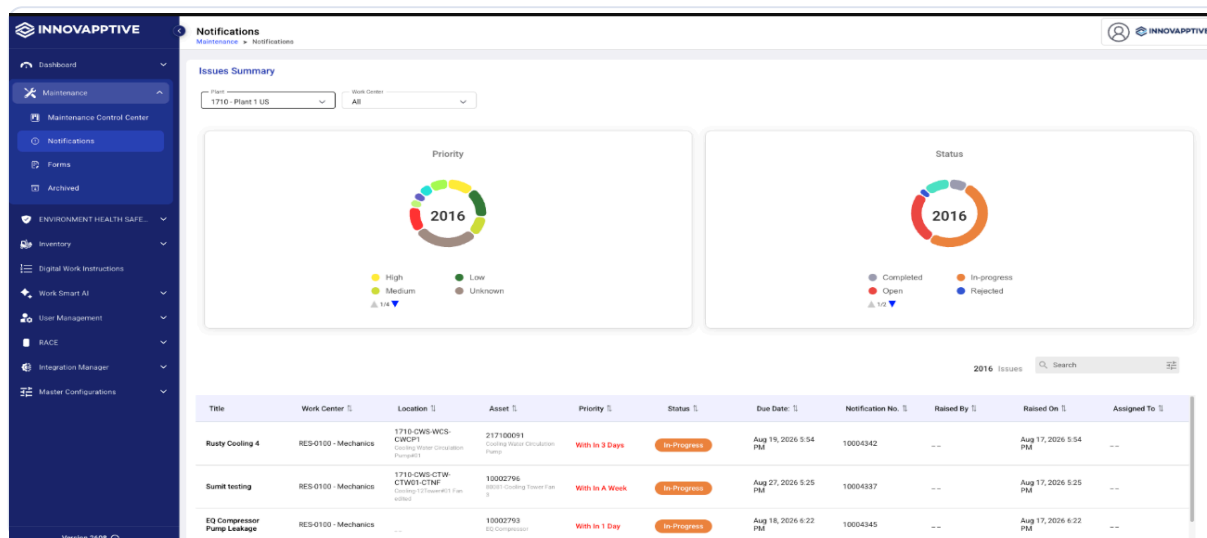
2.2.1. Explore the Home Screen

Use the home screen to review dashboards and reach the modules available to you.

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

- Track specific plants and assets' performance.
- View key widgets and summaries.
- Access dashboards and reports.

- Use the left-hand navigation panel for quick access to modules such as Maintenance, Notifications, and more.



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

2.2.2. Access Modules

Open available modules from the navigation panel and use their submenus to reach the required tasks.

Modules represent different functional areas of the platform (for example, Maintenance, Notifications, WorkSmart AI).

To access a module:

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

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

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

2.2.3. Understand the Platform Layout

Identify the header, navigation panel, workspace, filters, and actions used throughout the web application.

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

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

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

II. Set Up Access and Administration

Set up tenant access, authentication, users, roles, and groups before configuring maintenance work.

Chapters

- [Set Up Tenant Access with Azure and Okta \(on page 21\)](#)
- [Understand Authentication and Sessions \(on page 32\)](#)
- [Manage Users & Roles \(on page 39\)](#)

1. Set Up Tenant Access with Azure and Okta

Register iMaintenance with your identity provider and supply the tenant onboarding details, so that users can sign in with your organization accounts.

This setup is done by your IT administrator in Azure or Okta, together with the Innovapptive implementation team.

- [Customer Tenant Onboarding with Azure IDP \(on page 21\)](#)
- [Okta Single Page Application Configuration \(on page 25\)](#)

1.1. Customer Tenant Onboarding with Azure IDP

Register iMaintenance in Azure, configure access permissions and redirect addresses, and collect the tenant onboarding details.

Configure a customer's Azure Active Directory (Azure AD) for federated Single Sign-On (SSO) with Innovapptive mobile applications. This task is for IT administrators and implementation engineers performing customer onboarding.

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

1. Access the Azure portal using the following URL <https://portal.azure.com/> and, use required tenant credentials to login into the Azure portal.
2. Post login, click the **View** button.
3. Click the **App registrations** on the left-side menu.

4. Click the **New Registration** button and provide the required information to register tenant specific CWP enterprise application.
 - a. Name (Name of the CWP enterprise application).
 - b. Supported account types (It is self-explanatory. Select it based on the client's requirement. For now, go with a single tenant).
 - c. Redirect URI (Mention here the Tenant Specific URL that the user must be redirected to post successful login with Azure IDP).
 - d. Click the **Register** button.
 - e. For iMaintenance Product the redirect URI should be added as Web based application.



Note:

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

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

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

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



Note:

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

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

8. The following steps are useful in SAP OData endpoint authentication using SSO (SAML 2.0 Bearer Assertion Flow for OAuth 2.0).

- a. Click the **Certificates and secrets** from the side menu. You must see the Certificates and secrets screen.
- b. In the **Client secrets** tab, click the **New client secret** button. Provide description, expiration days and then click the **Add** button.
- c. Copy the generated secret value using the **Copy** icon and save it in a text file, to use at the time of tenant onboarding from the CWP web application. In case of secret expiration, follow the above step to generate a new secret and update in tenant onboarding.
- d. Click **Expose an API** from the side menu and then click the **Add a scope** button. You'll be asked to set the Application ID URI for the enterprise application registration. Accept the proposed default value by clicking the **Save and continue** button.
- e. Provide the required details and click the **Add scope** button.
- f. Copy the created scope by using the Copy icon and save it in a text file (or) Come back to Expose an API side menu for scope (View => App registrations => Application Name => Expose an API), to use at the time of tenant onboarding.

9. Click **Overview** from the side menu. Copy the Application (client) ID, Directory (tenant) ID and Application ID URI of the newly registered CWP enterprise application and save it in a text file (or) Come back to Overview side menu for client, tenant ids and application id URI (View => App registrations => Application Name), to use at the time of tenant onboarding.

10. If the user is not added into AAD Enterprise applications please follow the below steps to add the user into a particular application.

- a. Go to the e-application and look for the application that you created.
- b. Open the application and select users / groups and add the user if he is not added already to the application.



Note:

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

Table 3-1 From CWPEnterpriseApp

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



Note:

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

1.2. Okta Single Page Application Configuration

Register the web and mobile applications in Okta and collect the details needed for tenant onboarding.

Configure a Single Page Application (SPA) with Okta for authentication and authorization, using the required settings in the Okta Admin Console.

Prerequisites

Before starting the configuration, ensure the following:

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

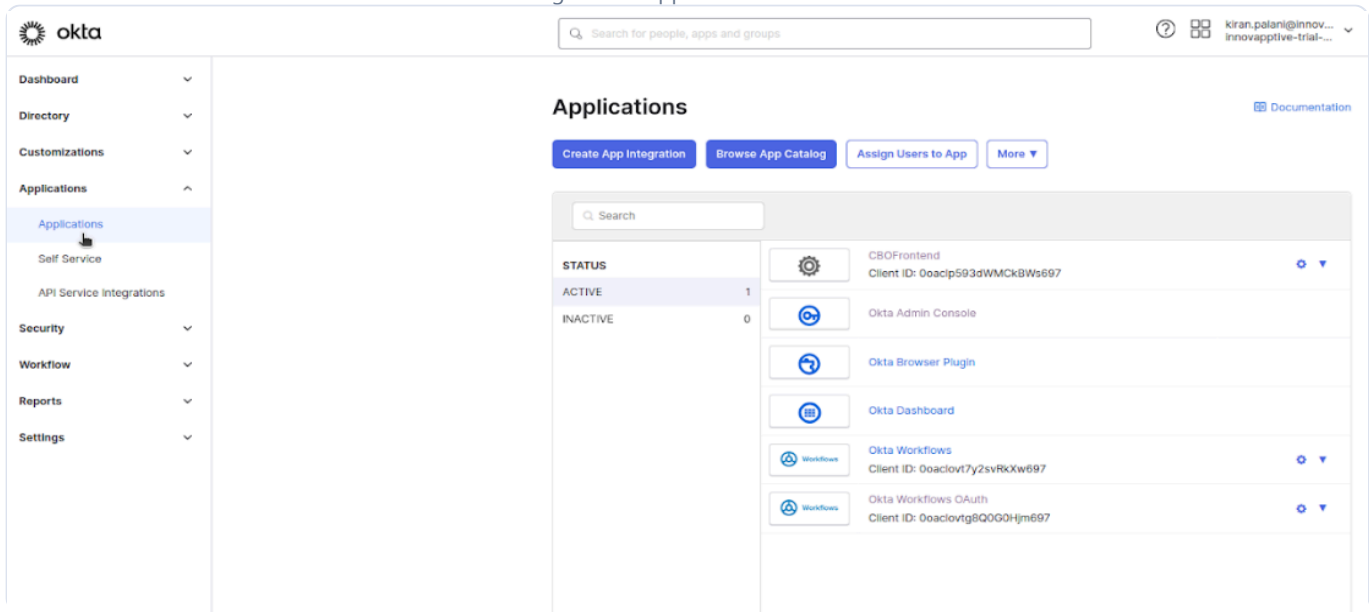
1.2.1. Okta Configuration for Innovapptive CBO (Web)

Register the web application in Okta and configure its grant types, redirect addresses, and access assignments.

To configure Okta for CBO web application:

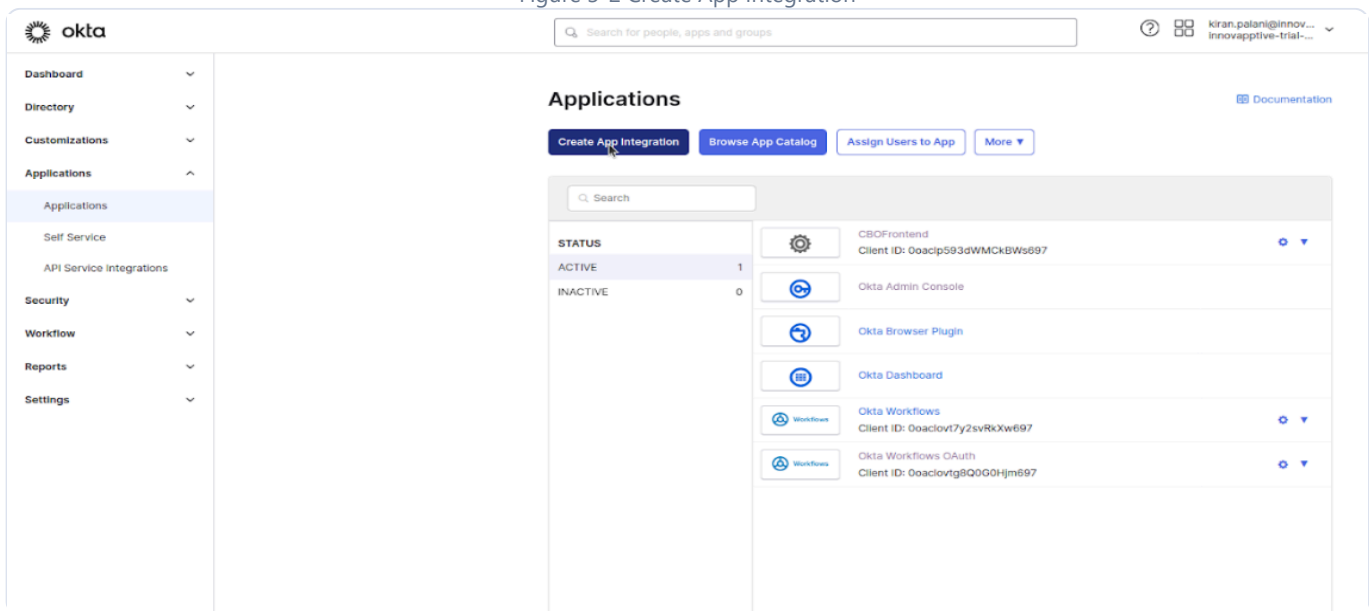
1. Log in to your Okta organization as an administrator.
2. Expand **Applications** on the left-side pane and select **Applications**.

Figure 3-1 Applications Screen

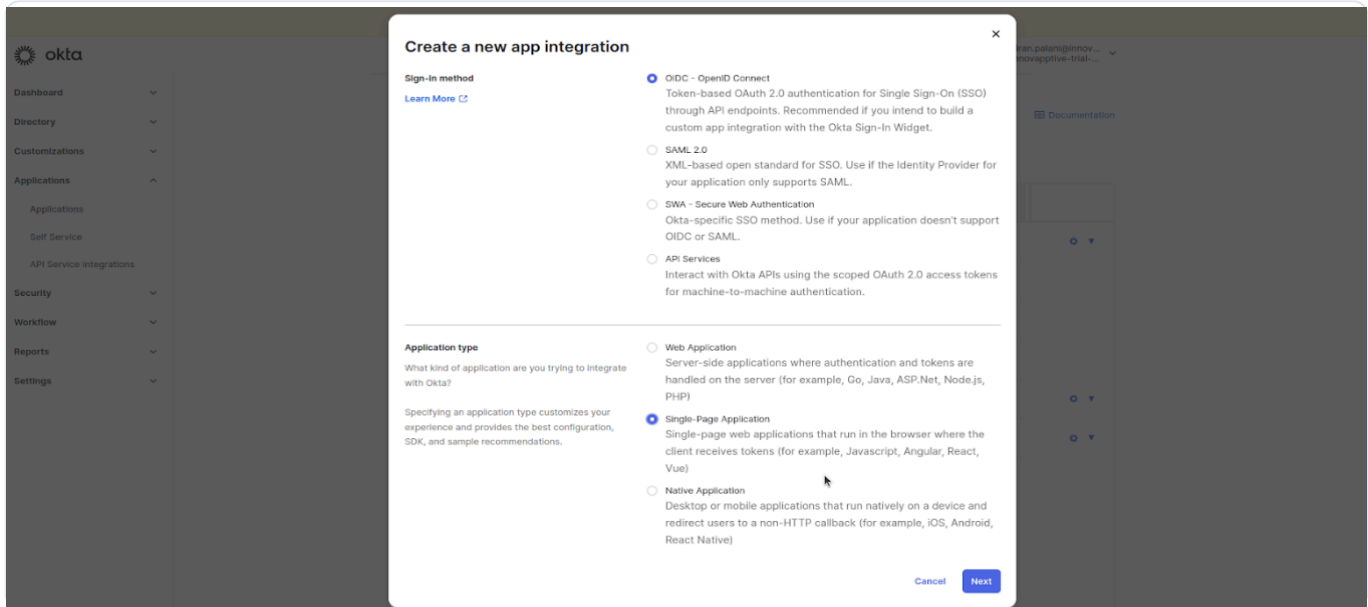


3. Click **Create App Integration**.

Figure 3-2 Create App Integration



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

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

(Environment – DEV/QA/PRD)

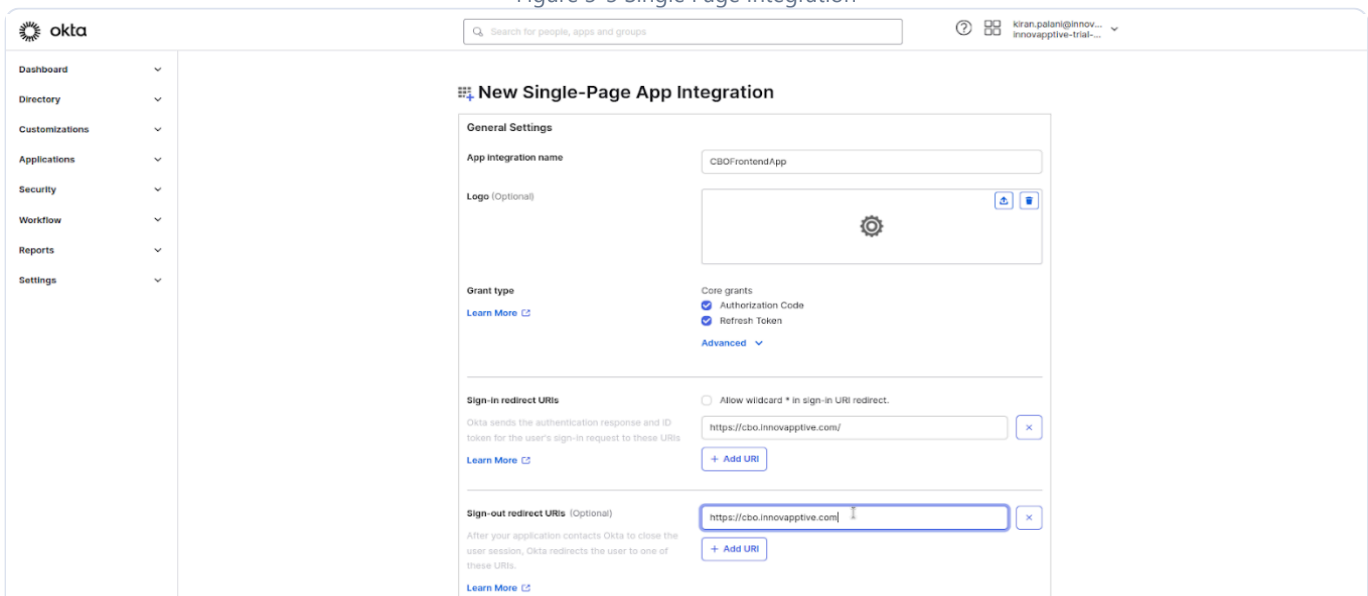
8. In the **Grant Types** section, select the following options:

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

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

(Innovapptive will provide the URL details)

Figure 3-3 Single Page Integration



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

11. Click **Save**.

Okta

Search for people, apps and groups

Dashboard

Directory

Customizations

Applications

Security

Workflow

Reports

Settings

Learn More

Trusted Origins

Base URIs (Optional)

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

+ Add URI

Learn More

Assignments

Controlled access

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

Allow everyone in your organization to access (selected)

Limit access to selected groups

Skip group assignment for now

Enable immediate access (Recommended)

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

Enable immediate access with Federation Broker Mode (checked)

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

Save Cancel

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

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

Figure 3-4 Copy Client ID

Okta

Search for people, apps and groups

Dashboard

Directory

Customizations

Applications

Self Service

API Service Integrations

Security

Workflow

Reports

Settings

← Back to Applications

CBOFrontendSPA

Active View Logs

General Sign On Assignments Okta API Scopes Application Rate Limits

Client Credentials

Client ID

0oadiv4fufTwrmBv6697

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

Client authentication

None (selected)

Proof Key for Code Exchange (PKCE)

Require PKCE as additional verification (checked)

General Settings

APPLICATION

App integration name

CBOFrontendSPA

Application type

Single Page App (SPA)

1.2.2. Okta Configuration for Innovapptive CBO (Mobile)

Register the mobile application in Okta and configure its sign-in options and redirect addresses.

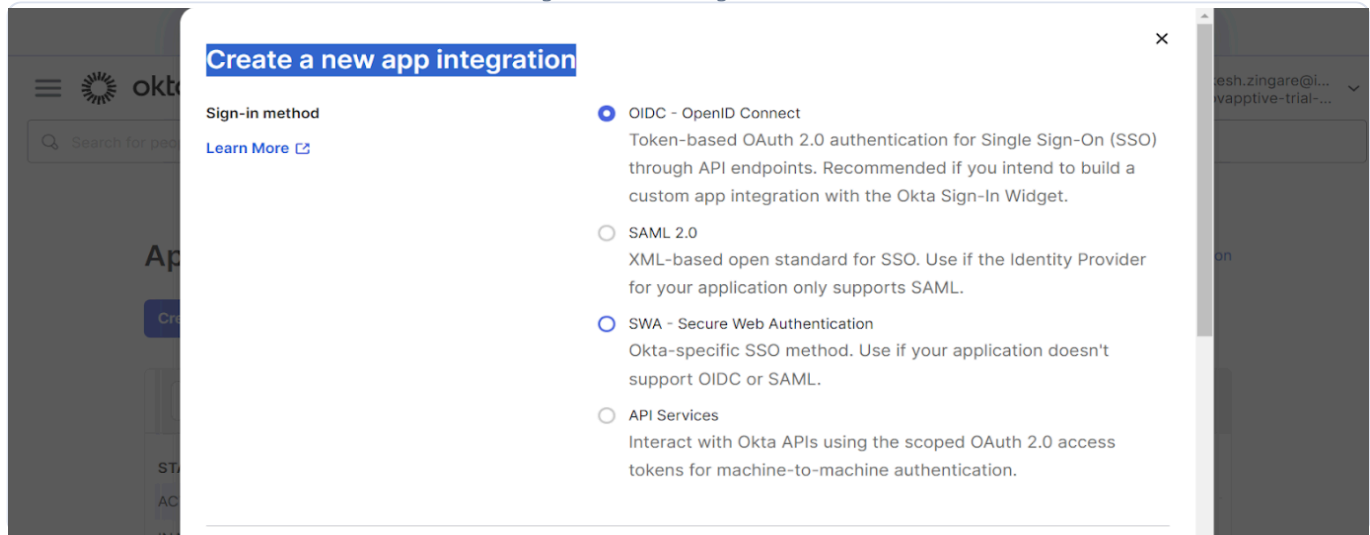
To configure Okta for mobile application:

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

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

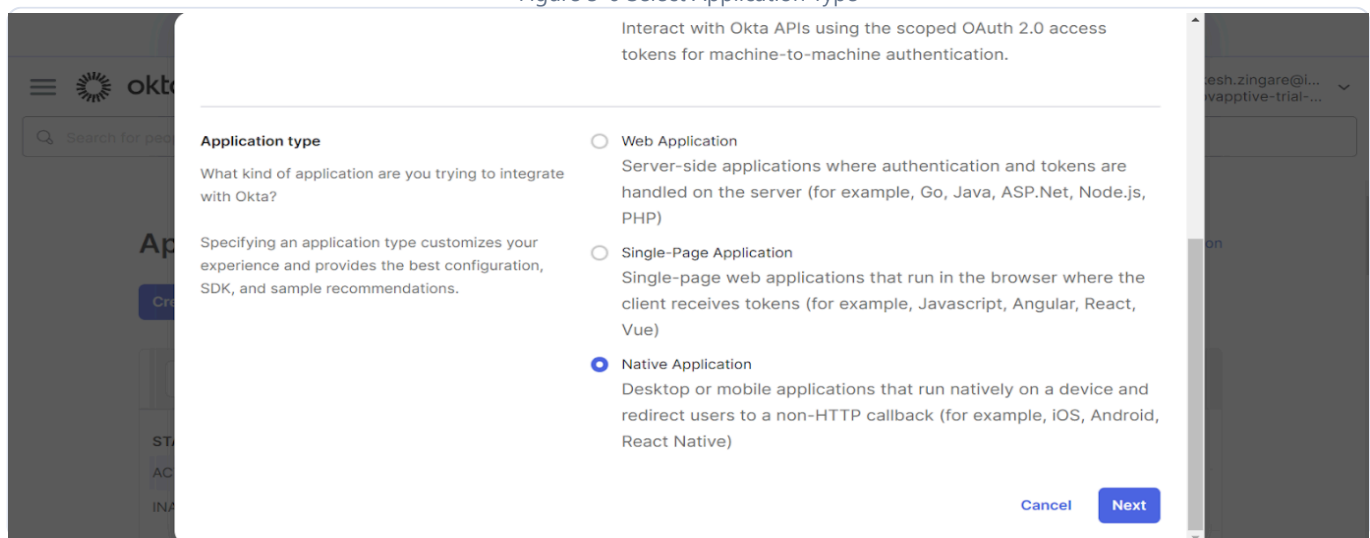
a. Select **Sign-in Method = OIDC - OpenID Connect**.

Figure 3-5 Select Sign In Method



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

Figure 3-6 Select Application Type



c. Click **Next**.

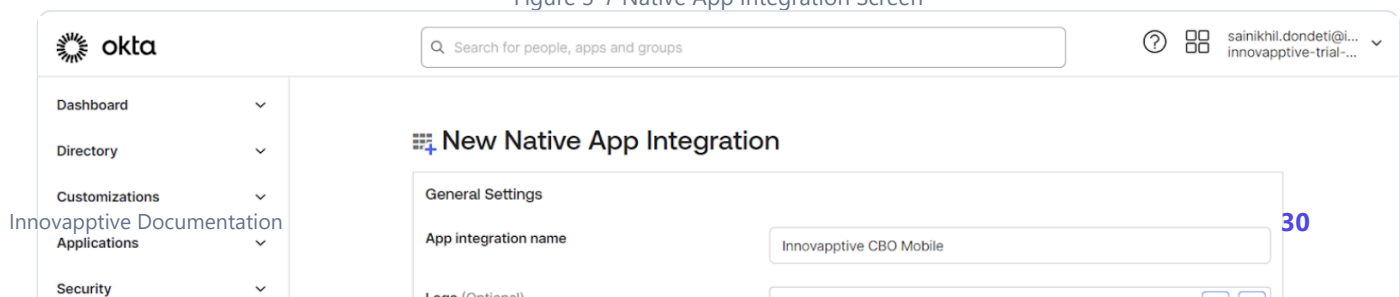
d. Add name "**Innovapptive CBO Mobile <Environment>**" in **App integration name** input.

(Environment – DEV/QA/PRD)

e. Select **Grant type**,

- Authorization Code
- Refresh Token

Figure 3-7 Native App Integration Screen



1.2.3. Tenant Onboarding Details and Field Mapping

Collect the Okta tenant details and map them to the fields required for Innovapptive onboarding.

Details Required for Tenant Onboarding

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

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

Tenant Onboarding Field Mapping

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

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

2. Understand Authentication and Sessions

Understand how sign-in, access tokens, session checks, and user synchronization work together in iMaintenance.

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

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

The session settings at the end of this chapter control SSO session checks and session timeout: [Configure SSO Session Checks \(on page 37\)](#) and [Configure Session Timeout \(on page 38\)](#).

Component Overview

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

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

Component	Description
SSO Server	The tenant-managed identity provider is responsible for authenticating users and issuing authorization codes and refresh tokens.
Mongo User Directory	MongoDB Realm directory is used to authorize users for of-line data sync and database access.

2.1. Federated SSO Login Flow

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

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

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

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

Figure 4-1 Federated SSO Login Flow – From Mobile App to SSO and Backend Sync

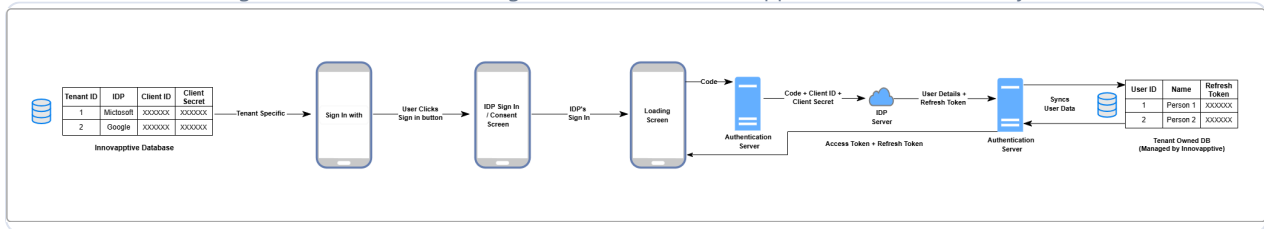
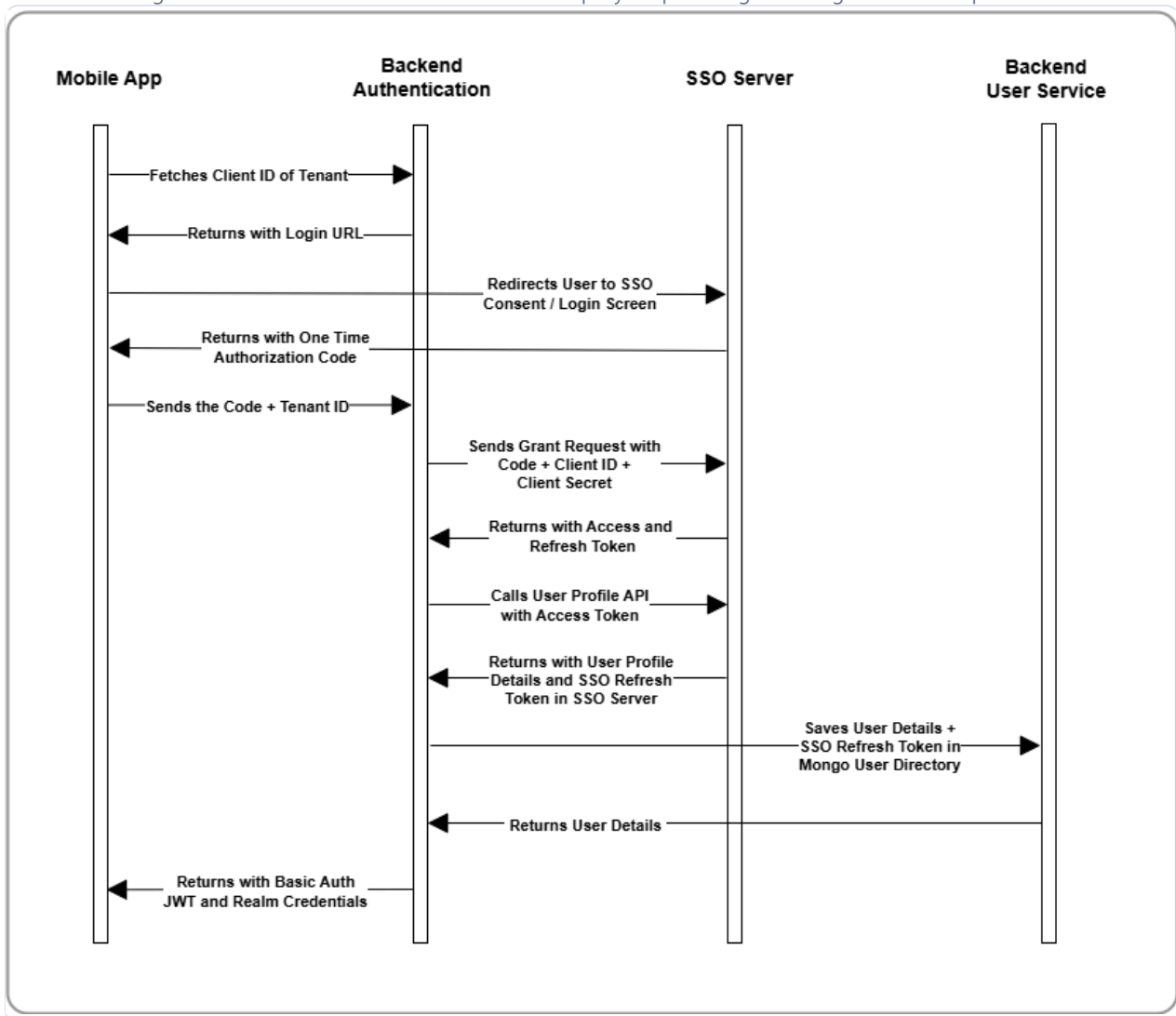


Figure 4-2 Authentication Module Flow V1 – Step-by-Step Message Exchange Across Components



Reference: https://excalidraw.com/#json=Uc84zoidzuFrQB_0mr-5,UHk6cX3C_yJpW-dDgC4nPw

2.2. Token-Based App API Flow

Access and refresh tokens are issued, stored, and verified for authenticated service calls.

After the user is authenticated via SSO, the mobile app uses access and refresh tokens issued by the Auth Server to interact securely with backend services.

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

What Happens at Login

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

2.3. Use the Token After Login

Backend services validate the access token on each call, and the app requests new access when the token expires.

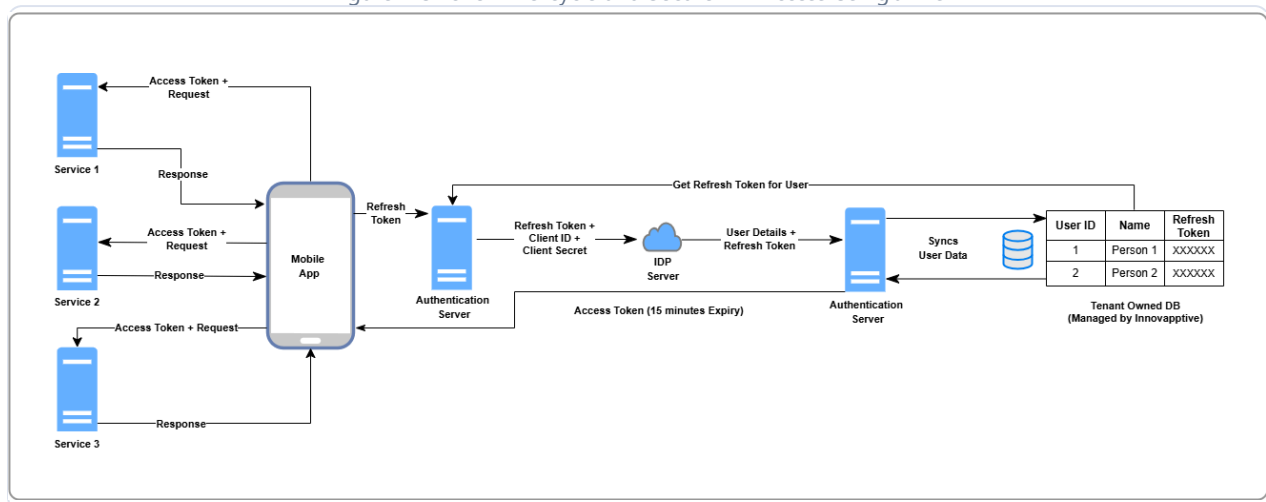
1. Every backend service is protected by a common middleware that validates the incoming access token using the Public Key.
2. For user-related data:
 - Services may perform read-only access to the Users Table directly for performance.
 - Alternatively, they can proxy the request via the Auth Server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

2.4. Refresh Token Handling

Refresh requests check the user's active status in the SSO system, then renew access or log the user out.

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

Figure 4-3 Token Life-cycle and Secure API Access Using JWTs



2.5. Alternatives for Users Table Synchronization

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

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

Scheduled Sync Pipeline

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

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

Event-Driven Pub/Sub Model

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

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

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

2.6. Configure SSO Session Checks

SSO session settings turn the SSO session-limiting checks on or off, separately for web and mobile logins.

These settings control the session-limiting checks that run when a user signs in with SSO. They do not turn SSO sign-in itself on or off. SSO sign-in is set up in your identity provider and during tenant onboarding.

Where it is configured

This setting is stored in the database as a configuration document of type `ssoSettings`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>mobileSSOEnabled</code>	Boolean	false	Turns the SSO session-limiting checks on or off for mobile app logins.
<code>webSSOEnabled</code>	Boolean	false	Turns the SSO session-limiting checks on or off for web application logins.

Sample configuration

```
"config": {  
  "mobileSSOEnabled": false,  
  "webSSOEnabled": false  
},  
"type": "ssoSettings"
```

Related settings

- [Configure Session Timeout \(on page 38\)](#)
- [Customer Tenant Onboarding with Azure IDP \(on page 21\)](#)
- [Okta Single Page Application Configuration \(on page 25\)](#)

2.7. Configure Session Timeout

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

- Session timeout can be configured at Tenant Level or Plant level.
- Default Session Timeout is at tenant level and set for 30 mins.
- All sessions login and logouts are captured in DB for audit purposes.
- Use the following values to manage session timeout.
 - Session Timeout can be Enabled or Disabled by setting True or False.
 - Set the duration in milliseconds. For example, 30 minutes is 1800000 ms.

```
"_id": {  
  "$oid": "6768b5dec3ca9a2f538dbc1c"  
},  
"type": "sessionTimeout",  
"plant": {  
  "$oid": "681a06b3aab43f5e132ff5c3"  
},  
"config": {  
  "enabled": true,  
  "duration": 1800000  
}
```

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

3. Manage Users & Roles

Create users, assign roles and access, and organize users into groups.

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

Related tasks

- [Add and Modify Users \(on page 40\)](#)
- [Create Roles and Permissions \(on page 39\)](#)
- [Manage User Groups \(on page 42\)](#)
- [Bulk Upload Users \(on page 45\)](#)
- [Configure User Onboarding Controls \(on page 46\)](#)
- [Configure Roles and Permissions Tabs \(on page 47\)](#)

3.1. Create Roles and Permissions

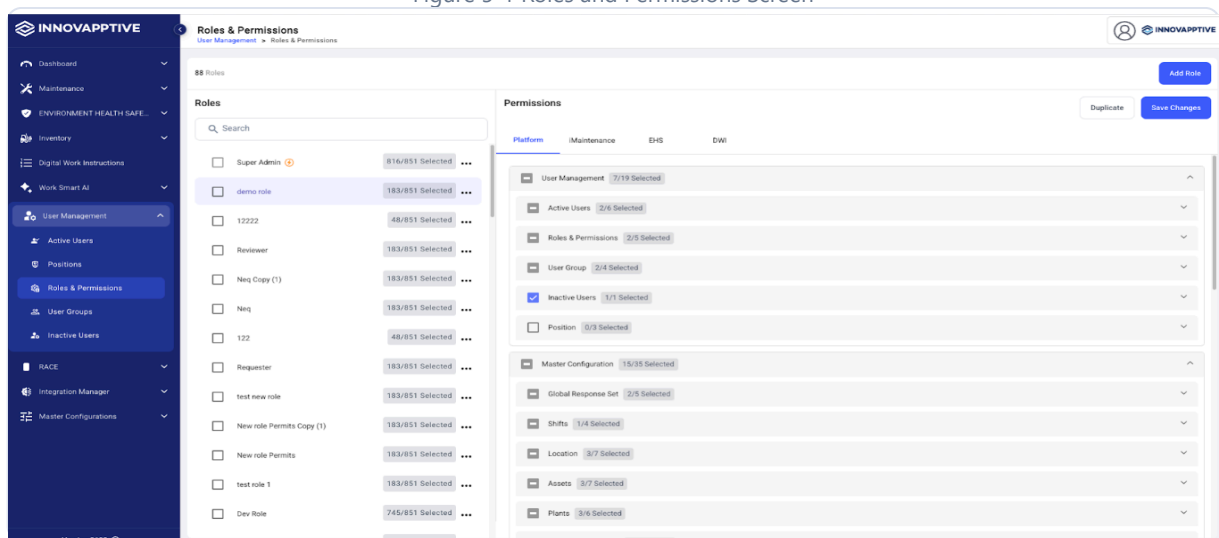
Create a role, choose its product and module permissions, and manage existing roles.

Roles determine which modules and features a user can access. Each role can be assigned specific permissions.

To create a role and assign permissions:

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

Figure 5-1 Roles and Permissions Screen



2. Click **Add Role**.
3. Fill in **Role Name** and **Role Description**.

4. Select the **Product** from the drop-down.
5. Click **Save**.
6. Select the new role.
7. Choose the modules that are required for the role or persona on the right-side.
8. Click **Save**.

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

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



Note:

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

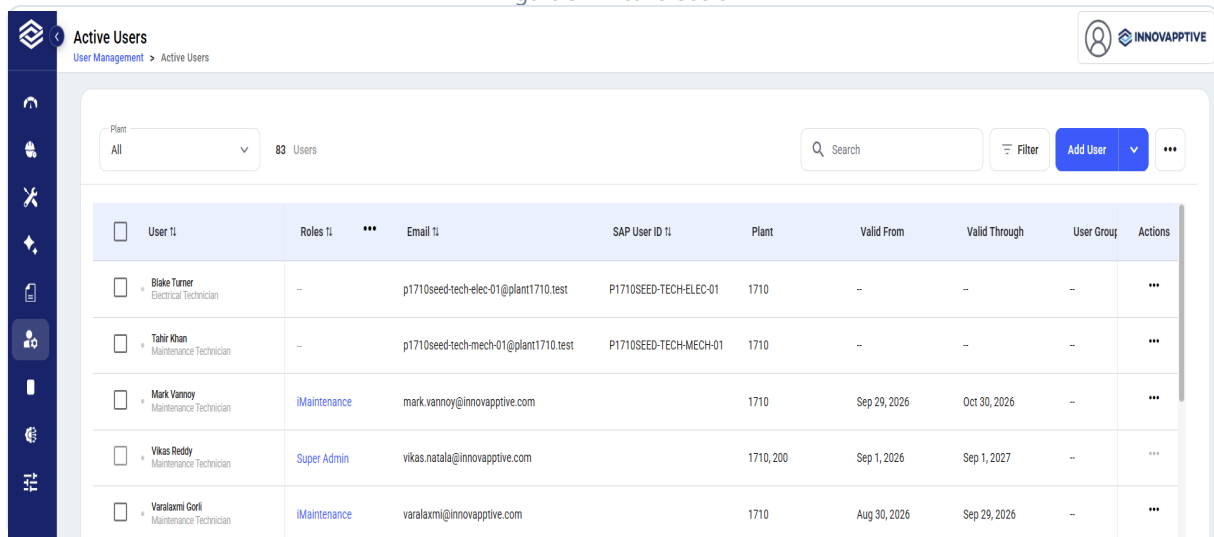
3.2. Add and Modify Users

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

To create a user manually:

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

Figure 5-2 Active Users



The screenshot displays the 'Active Users' interface. At the top, there's a breadcrumb trail: 'User Management > Active Users'. A search bar and a 'Filter' button are present. Below the search bar, a table lists active users. The table has columns: User ID, Roles, Email, SAP User ID, Plant, Valid From, Valid Through, User Group, and Actions. The table contains five rows of user data.

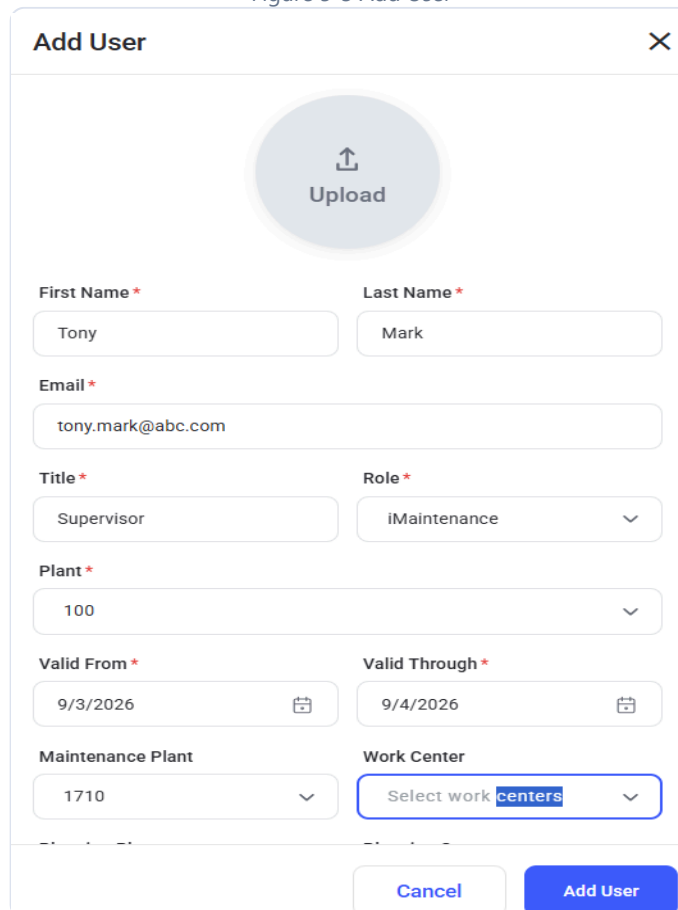
User ID	Roles	Email	SAP User ID	Plant	Valid From	Valid Through	User Group	Actions
Blake Turner Electrical Technician	-	p1710seed-tech-elec-01@plant1710.test	P1710SEED-TECH-ELEC-01	1710	-	-	-	...
Tahir Khan Maintenance Technician	-	p1710seed-tech-mech-01@plant1710.test	P1710SEED-TECH-MECH-01	1710	-	-	-	...
Mark Vannoy Maintenance Technician	iMaintenance	mark.vannoy@innovapptive.com		1710	Sep 29, 2026	Oct 30, 2026	-	...
Vikas Reddy Maintenance Technician	Super Admin	vikas.natala@innovapptive.com		1710, 200	Sep 1, 2026	Sep 1, 2027	-	...
Varalaxmi Cori Maintenance Technician	iMaintenance	varalaxmi@innovapptive.com		1710	Aug 30, 2026	Sep 29, 2026	-	...

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

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

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

Figure 5-3 Add User



The 'Add User' window contains the following fields and values:

- First Name ***: Tony
- Last Name ***: Mark
- Email ***: tony.mark@abc.com
- Title ***: Supervisor
- Role ***: iMaintenance
- Plant ***: 100
- Valid From ***: 9/3/2026
- Valid Through ***: 9/4/2026
- Maintenance Plant**: 1710
- Work Center**: Select work centers

Buttons at the bottom: Cancel, Add User

4. Click **Add User**.

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

Use **Upload Excel** for bulk creation.

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

To modify or deactivate a user:

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

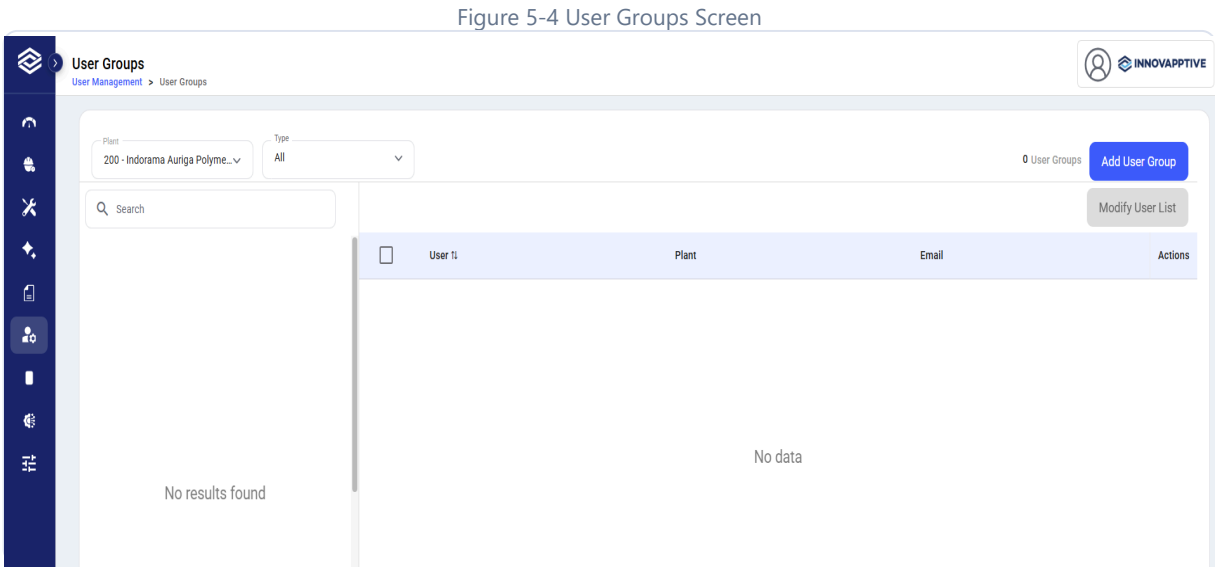
3.3. Manage User Groups

Create planner or maintenance groups and add or remove their members.

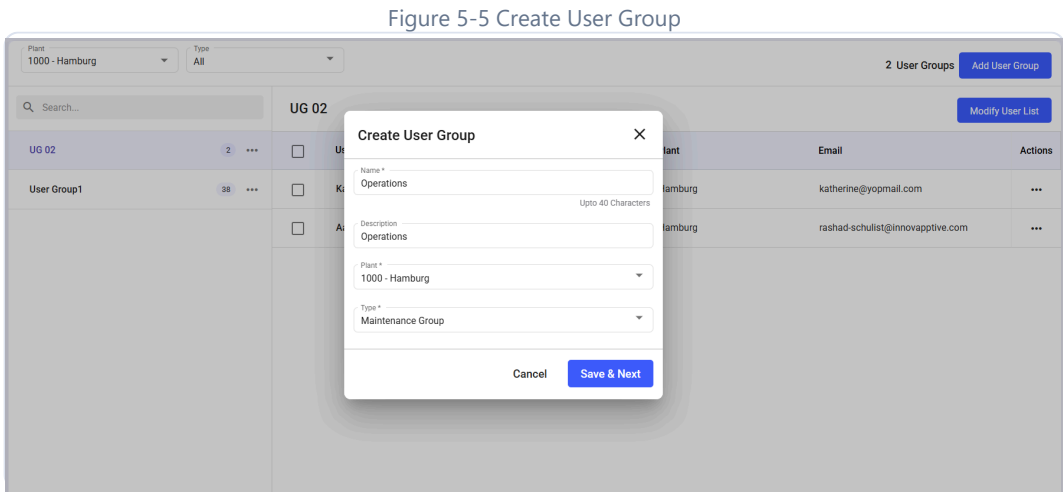
User Groups group users with similar responsibilities, so admins can assign permissions at group level instead of individually.

To create a user group:

1. Navigate to **User Management > User Groups**.

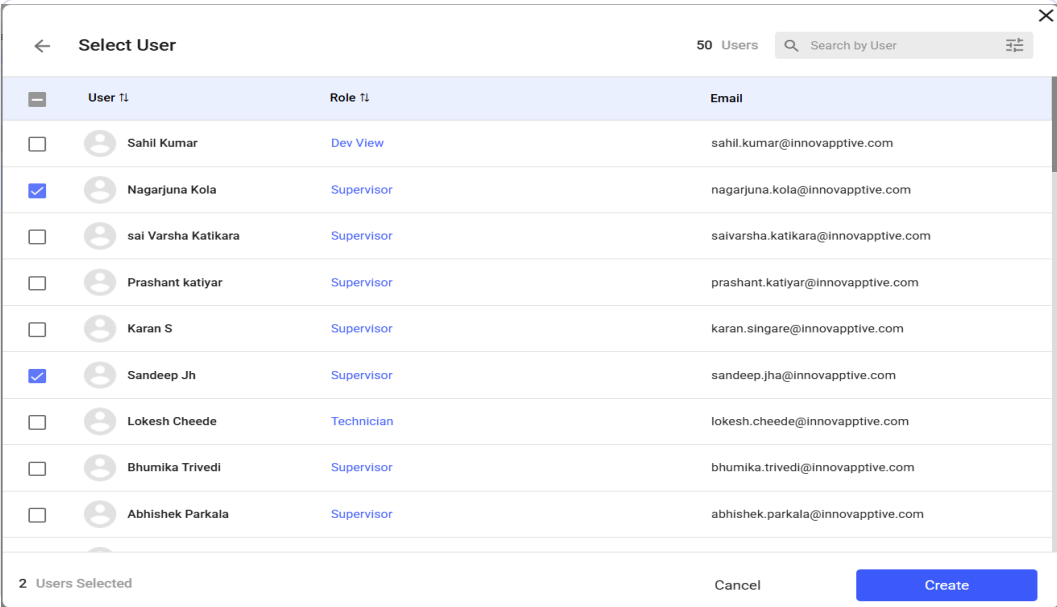


2. Click **Add User Group**.
3. In the **Create User Group** window, fill in the following details:
- Name, Description, Plant
 - Type: Planner Group or Maintenance Group
4. Click **Save & Next**.



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

Figure 5-6 Select Users



	User ID	Role ID	Email
☐	Sahil Kumar	Dev View	sahil.kumar@innovapptive.com
☒	Nagarjuna Kola	Supervisor	nagarjuna.kola@innovapptive.com
☐	sai Varsha Katikara	Supervisor	saivarsha.katikara@innovapptive.com
☐	Prashant katiyar	Supervisor	prashant.katiyar@innovapptive.com
☐	Karan S	Supervisor	karan.singare@innovapptive.com
☒	Sandeep Jh	Supervisor	sandeep.jha@innovapptive.com
☐	Lokesh Cheede	Technician	lokesh.cheede@innovapptive.com
☐	Bhumika Trivedi	Supervisor	bhumika.trivedi@innovapptive.com
☐	Abhishek Parkala	Supervisor	abhishek.parkala@innovapptive.com

2 Users Selected

Cancel Create

To modify user groups:

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

3.4. Bulk Upload Users

Create multiple users by completing and uploading the user Excel template.

Before you begin

Bulk user upload is turned on (`userUploadEnabled` is `true`). See [Configure User Onboarding Controls \(on page 46\)](#).

Use this method to onboard large teams.



Note:

The Work Center field is optional during bulk user creation.

To bulk upload users:

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

3.5. Configure User Onboarding Controls

Turn bulk user upload on or off and define onboarding settings.

Where it is configured

This setting is stored in the database as a configuration document of type `userOnboardingConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>domainWhitelist</code>	Array	<code>[]</code> (empty)	List of email domains allowed for onboarded users. The seed list is empty.
<code>userUploadEnabled</code>	Boolean	<code>true</code>	Turns bulk user upload through the Excel template on (true) or off (false).

Sample configuration

```
"config" {  
  "domainWhitelist": [],  
  "userUploadEnabled": true  
},  
"type": "userOnboardingConfig"
```

Related settings

- [Bulk Upload Users \(on page 45\)](#)

3.6. Configure Roles and Permissions Tabs

These settings control which Roles and Permissions tabs appear for each product.

Where it is configured

This setting is stored in the database as a configuration document of type `rolesPermissionsConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>enableRolesTabCWP</code>	Boolean	true	Shows or hides the Roles and Permissions tab for the Connected Worker Platform (CWP).
<code>enableRolesTabM-WorkOrder</code>	Boolean	true	Shows or hides the Roles and Permissions tab for mWorkOrder.

Sample configuration

```
"config": {  
  "enableRolesTabCWP": true,  
  "enableRolesTabMWorkOrder": true  
},  
"type": "rolesPermissionsConfig"
```

Related settings

- [Create Roles and Permissions \(on page 39\)](#)

III. Configure Data and Integrations

Maintain shared data, connect the ERP, and set the product-wide configuration used across iMaintenance.

Chapters

- [Maintain Master Configurations \(on page 49\)](#)
- [Configure ERP Integration and Synchronization \(on page 56\)](#)
- [Configure Shared Product Settings \(on page 79\)](#)

1. Maintain Master Configurations

Maintain plants, shifts, locations, assets, units of measurement, and shared response sets used across iMaintenance.

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

Related tasks

- [Create a Plant \(on page 49\)](#)
- [Create a Shift \(on page 51\)](#)
- [Create a Location \(on page 51\)](#)
- [Create an Asset \(on page 52\)](#)
- [Create a Unit of Measurement \(on page 53\)](#)
- [Create a Global Response Set \(on page 54\)](#)
- [Bulk Upload Master Data \(on page 55\)](#)

1.1. Create a Plant

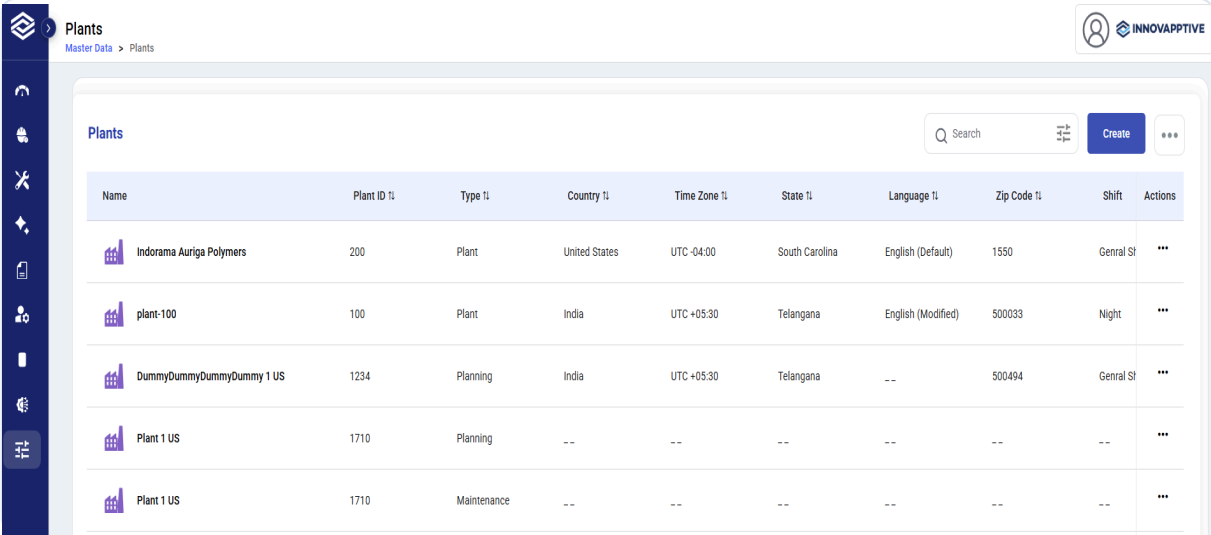
Create a plant with its identifying details, time zone, shifts, and additional fields.

If your ERP (SAP or Maximo) synchronizes plants through Integration Manager, follow the data-ownership rules agreed for your implementation when you create plants here.

To create a plant:

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

Figure 6-1 Plants Screen



Name	Plant ID	Type	Country	Time Zone	State	Language	Zip Code	Shift	Actions
Indorama Auriga Polymers	200	Plant	United States	UTC -04:00	South Carolina	English (Default)	1550	Genral St	...
plant-100	100	Plant	India	UTC +05:30	Telangana	English (Modified)	500033	Night	...
DummyDummyDummy 1 US	1234	Planning	India	UTC +05:30	Telangana	--	500494	Genral St	...
Plant 1 US	1710	Planning	--	--	--	--	--	--	...
Plant 1 US	1710	Maintenance	--	--	--	--	--	--	...

2. Click **Create**.

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

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



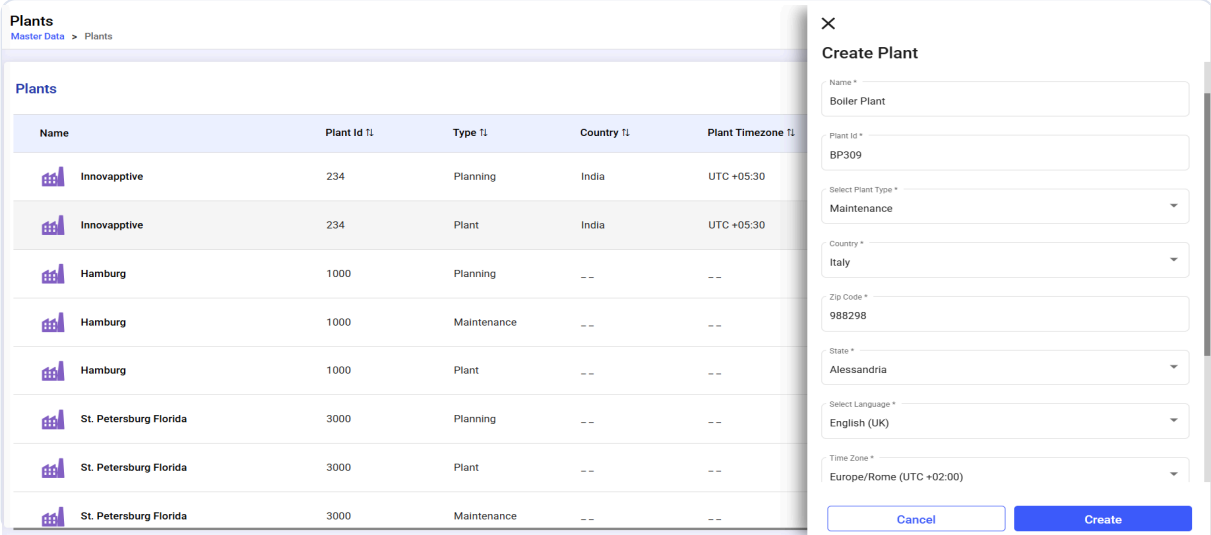
Note:

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

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

5. Click **Create**.

Figure 6-2 Create Plant



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

Create Plant

Name *
Boiler Plant

Plant Id *
BP309

Select Plant Type *
Maintenance

Country *
Italy

Zip Code *
988298

State *
Alessandria

Select Language *
English (UK)

Time Zone *
Europe/Rome (UTC +02:00)

Cancel Create

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

Related information

[Add Alerts and IMES Widgets to Shift Handover Reports \(on page 77\)](#)

1.2. Create a Shift

Create a shift for a plant and define its start time, end time, and active status.

To create a shift:

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

Figure 6-3 Create Shift

The screenshot shows the 'Shifts' configuration page on the left and the 'Create Shift' modal window on the right. The 'Shifts' page has a breadcrumb 'Master Data > Shifts' and a table with the following data:

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

The 'Create Shift' modal window has the following fields and controls:

- Name**: Text input field with the value 'Morning Shift'.
- Start Time**: Time picker showing '09:30'.
- End Time**: Time picker showing '11:30'.
- Active**: Toggle switch, currently turned on (green).
- Buttons**: 'Cancel' and 'Create' buttons at the bottom.

1.3. Create a Location

Create a location with its identifying details, plant, and parent relationship.

If your ERP (SAP or Maximo) synchronizes locations through Integration Manager, follow the data-ownership rules agreed for your implementation when you create locations here.

To create a location:

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

Figure 6-4 Create Location

The screenshot displays the 'Locations' master data window and the 'Create Location' modal. The 'Locations' window shows a table of existing locations with columns: ID, Name, Description, Model, and Parent. The 'Create Location' modal is open, showing fields for Name, Location ID, Model, Description, Plant, and Parent, along with 'Cancel' and 'Create' buttons.

ID	Name	Description	Model	Parent
1111-222-AB-33	Inspection zone- AB-33	Inspection zone- AB-33	--	--
RE-02-01-00/02	Elevator Goods Entrance 2, Building 1	Elevator Goods Entrance 2, Building 1	--	--
KA1-B-2		--	--	Biolog
K1-BR2-32	Filtration plant - filter 2	Filtration plant - filter 2	--	2nd bio plant
K1-M	Mechanical purification	Mechanical purification	--	Clarific
K1-BR2-4	2nd biolog. cleaning - measuring plant	2nd biolog. cleaning - measuring plant	--	2nd bio
K1-BR2-21	Intermediate plant - flushing pump 1	Intermediate plant - flushing pump 1	--	2nd bio interm
K1-MER	Mechanical purification	Mechanical purification	--	Mechan

Create Location

Name *
Wing2

Location Id *
LOCW22

Model
Mod1

Description

Plant *
1000 - Hamburg

Parent
Grit chamber - tank 2 - K1-MER-12

Cancel Create

1.4. Create an Asset

Create an asset with its identifying details, plant, and parent relationship.

If your ERP (SAP or Maximo) synchronizes assets through Integration Manager, follow the data-ownership rules agreed for your implementation when you create assets here.

To create an asset:

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

Figure 6-5 Create Asset

The screenshot shows the 'Assets' page with a table of existing assets and a 'Create Asset' modal open on the right.

ID T1	Name T1	Description T1	Model T1	Parent
10257176	Excavator-01	Excavator-01	5000	--
10257175	Conductors pump	Conductors pump	--	Pump, E 1000099
10257174	Conductors	Conductors	--	Pump, E 1000099
10257173	Pump bearing 15/5	Pump bearing 15/5	--	--
10257172	COMPRESSOR PLANT-1000	COMPRESSOR PLANT-1000	hrx-10	Compr 1000700
10257171	TRACE EDT-123	TRACE EDT-123	hrx-10	EDT DE 1025719
10257170	EDT DEVICE AB-2	EDT DEVICE AB-2	--	EDT DE 1025719
10257169	EDT DEVICE AB-1	EDT DEVICE AB-1	hrx-100	--

The 'Create Asset' modal contains the following fields:

- Name: Boiler Machine
- Asset ID: AS239821
- Model: AS239821
- Description: (empty)
- Plant: 1000 - Hamburg
- Parent Type: ☒ Asset
- Parent: (empty)

Buttons: Cancel, Create

1.5. Create a Unit of Measurement

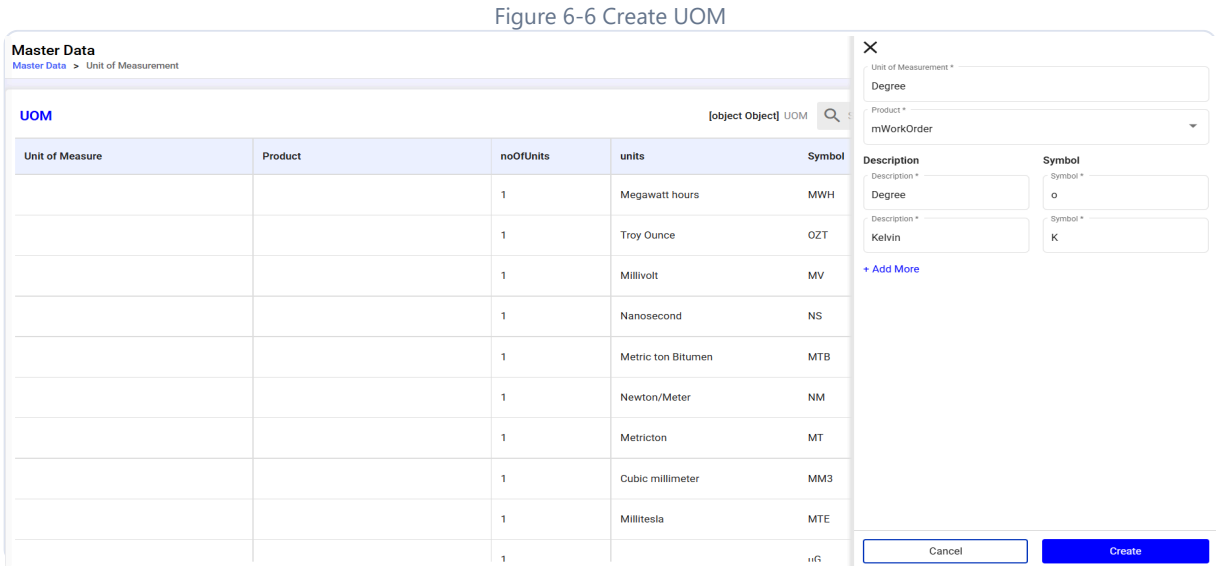
Create units of measurement with a measurement type, description, and symbol.

To create a UOM:

1. Navigate to **Master Data > Unit of Measurement.**
2. Click **Create New > Create Manually.**
3. In the **Create Unit** window, fill in the following fields:

◦ Measurement Type, Description, Symbol.

◦ Add more entries as needed.
4. Click **Create.**



1.6. Create a Global Response Set

Create a reusable response set with a name, metadata type, and response values.

To create a global response set:

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

Figure 6-7 Create Global Response Set

The screenshot displays the 'Global Response Set' management interface. On the left, a table lists existing response sets. On the right, a modal form titled 'Create Global Response Set' is open, showing fields for Name, Condition Logic, Description, and Values.

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

Create Global Response Set

Name *

Condition Logic

Description:

Add as Meta Data For

Forms

Values

Value Title *

Yes or NO

+ Add More

Clear all Cancel Save

1.7. Bulk Upload Master Data

Create multiple master-data records by completing and uploading the Excel template for the selected record type.

To bulk upload master data:

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

2. Configure ERP Integration and Synchronization

Connect iMaintenance to your ERP, map ERP values, and configure synchronization settings.

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

Prepare the backend system before you connect it. For SAP or Maximo, see [Connect to SAP](#) or [Connect to Maximo](#) in the *iMaintenance Deployment & Setup Guide*.

Related tasks

- [Understand the Integration Workflow \(on page 56\)](#)
- [Connect to ERP \(on page 57\)](#)
- [Configure Innovapptive Key Mapping \(on page 57\)](#)
- [Configure Time Zone Mapping for Confirmations \(on page 65\)](#)
- [Configure SAP Inbound Synchronization \(on page 71\)](#)
- [Exclude Plants from Initial Synchronization \(on page 72\)](#)
- [Connect Shift Handover Reports to Platform Alerts and IMES \(on page 73\)](#)

2.1. Understand the Integration Workflow

Understand how inbound, outbound, and delta synchronization move data between iMaintenance and the ERP.

Integration Manager supports three types of data synchronization:

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

The Delta Sync schedule applies to SAP. With Maximo, Maximo publishes asset, location, and Work Order changes to iMaintenance through Kafka event channels. See *Connect to Maximo* in the *iMaintenance Deployment & Setup Guide*.

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

2.2. Connect to ERP

Start an ERP connection from Integration Manager to support data exchange with iMaintenance.

Before you begin

The backend is prepared: *Connect to SAP* or *Connect to Maximo* in the *iMaintenance Deployment & Setup Guide* is complete.

To connect to ERP:

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

Once connected:

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

2.3. Configure Innovapptive Key Mapping

The Innovapptive key mapping connects ERP values to iMaintenance: order and notification types, system statuses, priorities, movement types, and confirmation units.

This is the setting with the widest effect on how ERP data appears in iMaintenance. Check it against your ERP configuration before go-live. Values such as order types, notification types, and priority codes must match the codes used in your ERP system. The sample values in this topic are SAP codes.

Where it is configured

This setting is stored in the database as a configuration document of type `innovapptiveKeyMapping`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>breakdown_WO</code>	String	PM03	ERP order type used for breakdown Work Orders.
<code>corrective_WO</code>	String	PM02	ERP order type used for corrective Work Orders.
<code>preventive_WO</code>	String	PM01	ERP order type used for preventive Work Orders.
<code>emergency_WO</code>	String	EMER	ERP order type used for emergency Work Orders.
<code>followUpWorkOrder-Type</code>	String	(empty)	ERP order type used for follow-up Work Orders.
<code>breakdown_ISSUE</code>	String	M2	ERP notification type used for breakdown Issues.
<code>corrective_ISSUE</code>	String	M1	ERP notification type used for corrective Issues.
<code>service_ISSUE</code>	String	S1	ERP notification type used for service Issues.
<code>ContinImprovement</code>	String	Contin. Improvement	Label used for continuous improvement.
<code>objectCategory_EQ</code>	String	IEQ	ERP object category for equipment.
<code>objectCategory_FL</code>	String	IFL	ERP object category for functional locations.
<code>assemblyMaterial-Type</code>	Array	IBAU	ERP material types treated as assemblies.
<code>workOrderSystemStatus</code>	Object	<code>CLSD</code> → Closed, <code>CRTD</code> → Created, <code>REL</code> → Released, <code>TECO</code> → Closed	Maps ERP Work Order system status codes to the status shown in iMaintenance.
<code>woOperationSystem-Status</code>	Object	<code>CLSD</code> → Completed, <code>CNF</code> → Completed, <code>CRTD</code> → Not Started, <code>MCNF</code> → Partial Confirm, <code>PCNF</code> → Partial Confirm, <code>REL</code> → Released	Maps ERP operation system status codes to the status shown in iMaintenance.

Field	Type	Seed value	Description
issueSystemStatus	Object	DLFL, NOCO → Rejected, NOCO → Completed, NOPR → Released, NOPR, O-RAS → In-Progress, OSNO → Open	Maps ERP notification system status codes to the Issue status shown in iMaintenance. A key can hold more than one status code, separated by a comma.
workOrderPriority	Object	Emergency → B, Longer term Schedule → E, Routine → D, Shut down → F, Urgent → C	Maps Work Order priority names to ERP priority codes.
issuePriority	Object	Emergency → B, Longer term Schedule → E, Routine → D, Shut down → F, Urgent → C	Maps Issue priority names to ERP priority codes.
issueProcessControl	Object	1 → Allowed, 2 → Warning, 3 → Prohibited	Maps ERP process control values to their meaning.
movementTypeCollected	String	261	ERP movement type used when components are collected.
movementTypeReturned	String	262	ERP movement type used when components are returned.
confirmationUnit	Object	30 units	Conversion factor for each ERP unit used in operation confirmations. See the table below.
D, H, M, MIN, Y	Array	D: TAG, DAY; H: HR, H, HUR; M: M; MIN: MIN; Y: Y	Groups the ERP unit codes that mean the same unit.
combineItemCauses	Boolean	false	Combines Issue items and causes.
displayReservationNumber	Boolean	true	Shows the reservation number.
hideUserPreferenceFields	Boolean	false	Hides user preference fields.
isApplyRevision-WithDateChangeCTAEnabled	Boolean	false	Turns on the action to apply a revision together with a date change.

Field	Type	Seed value	Description
isComponentCollectionRequired	Boolean	true	Requires component collection.

Sample configuration

```
"config": {
  "assemblyMaterialType": [
    "IBAU"
  ],
  "breakdown_ISSUE": "M2",
  "breakdown_WO": "PM03",
  "ContinImprovement": "Contin. Improvement",
  "combineItemCauses": false,
  "confirmationUnit": {
    "10": 86400,
    "/MI": 0.01666667,
    "15M": 900,
    "B/H": 3600,
    "D": 86400,
    "DAY": 86400,
    "FTE": 28800,
    "H": 3600,
    "HR": 3600,
    "HUR": 3600,
    "M": 60,
    "MIN": 60,
    "MIS": 1e-06,
    "MON": 2592000,
    "MS": 0.001,
    "NS": 1e-09,
    "OPH": 3600,
    "PDA": 28800,
    "PS": 1e-12,
    "S": 1,
    "SEC": 1,
    "STD": 3600,
    "TAG": 86400,
    "TE": 1,
    "TM": 60,
    "WCH": 604800,
    "WD": 86400,
    "WK": 604800,
    "YR": 31536000,
    "ZPD": 28800
  },
  "corrective_ISSUE": "M1",
  "corrective_WO": "PM02",
  "D": {
    "TAG",
    "DAY"
  },
  "displayReservationNumber": true,
  "emergency_WO": "EMER",
  "followUpWorkOrderType": "",
  "H": {
    "HR",
    "H",
    "HUR"
  },
  "hideUserPreferenceFields": false,
  "isApplyRevisionWithDateChangeCTAEnabled": false,
  "isComponentCollectionRequired": true,
  "issuePriority": {
    "Emergency": "B",
    "Longer term Schedule": "E",
    "Routine": "D",
    "Shut down": "F",
    "Urgent": "C"
  },
  "issueProcessControl": {
    "1": "Warning",
    "2": "Warning",
    "3": "Prohibited"
  }
}
```

Confirmation units in the seed

ERP unit	Conversion factor
10	86400
/MI	0.0166667
15M	900
B/H	3600
D	86400
DAY	86400
FTE	28800
H	3600
HR	3600
HUR	3600
M	60
MIN	60
MIS	1e-06
MON	2592000
MS	0.001
NS	1e-09
OPH	3600
PDA	28800
PS	1e-12
S	1
SEC	1
STD	3600
TAG	86400

ERP unit	Conversion factor
TE	1
TM	60
WCH	604800
WD	86400
WK	604800
YR	31536000
ZPD	28800

Plant-level example from an existing deployment

This example shows a key mapping document applied to a plant. It contains a subset of the fields.

```

    "_id": {
      "$oid": "6799eab0f1f16f84aa3de757"
    },
    "type": "innovapptiveKeyMapping",
    "config": {
      "breakdown_ISSUE": "M2",
      "breakdown_WO": "PM03",
      "corrective_ISSUE": "M1",
      "corrective_WO": "PM02",
      "emergency_WO": "EMER",
      "preventive_WO": "PM01",
      "service_ISSUE": "S1",
      "objectCategory_EQ": "IEQ",
      "objectCategory_FL": "IFL",
      "issueSystemStatus": {
        "DLFL,NOCO": "Rejected",
        "OSNO": "Open",
        "NOPR,ORAS": "In-Progress",
        "NOPR": "Released",
        "NOCO": "Completed"
      },
      "woOperationSystemStatus": {
        "CRTD": "Not Started",
        "CLSD": "Completed",
        "REL": "Released",
        "PCNF": "Partial Confirm",
        "MCNF": "Partial Confirm",
        "CNF": "Completed"
      },
      "issueProcessControl": {
        "1": "Allowed",
        "2": "Warning",
        "3": "Prohibited"
      },
      "workOrderSystemStatus": {
        "CRTD": "Created",
        "REL": "Released",
        "TECO": "Closed",
        "CLSD": "Closed"
      }
    },
    "plant": {
      "$oid": "681a06b3aab43f5e132ff5c3"
    }
  }

```

Notes

- The seed document is in the general (tenant) configuration. The example above shows the same type applied with a plant reference.

Related settings

- [Configure Risk Matrix Priority Colors \(on page 171\)](#)
- [Understand the Integration Workflow \(on page 56\)](#)
- [Configure MCC Kanban Movement Rules \(on page 107\)](#)

2.4. Configure Time Zone Mapping for Confirmations

The time zone setting gives the fallback time zone and maps SAP time zone codes to IANA time zones for operation confirmation timestamps.

Where it is configured

This setting is stored in the database as a configuration document of type `timeZone`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>timeZone</code>	String	UTC	Fallback IANA time zone used for operation confirmation timestamps.
<code>timeZoneMapping</code>	Object	123 entries	Maps each SAP time zone code (key) to an IANA time zone (value). See the full seed mapping below.

Sample configuration (mapping shortened)

```
"config" {  
  "timeZone" "UTC"  
  "timeZoneMapping" {  
    "CET" "Europe/Berlin"  
    "EST" "America/New_York"  
    "INDIA" "Asia/Kolkata"  
    "UTC" "Etc/UTC"  
  }  
}  
"type" "timeZone"
```

SAP time zone mapping in the seed

The seed mapping contains 123 SAP time zone codes.

SAP time zone	IANA time zone
<code>AALAWART</code>	<code>Australia/Darwin</code>

SAP time zone	IANA time zone
AFGHAN	Asia/Kabul
ALA	America/Anchorage
ALAW	America/Adak
ALAWART	America/Anchorage
ART	America/Argentina/Buenos_Aires
AST	America/Halifax
ASTNO	America/Curacao
AUSACT	Australia/Sydney
AUSEUC	Australia/Eucla
AUSLHI	Australia/Lord_Howe
AUSNSW	Australia/Sydney
AUSNT	Australia/Darwin
AUSQLD	Australia/Brisbane
AUSSA	Australia/Adelaide
AUSTAS	Australia/Hobart
AUSVIC	Australia/Melbourne
AUSWA	Australia/Perth
AZOREN	Atlantic/Azores
AZT	Asia/Baku
BDT	Asia/Dhaka
BRAZIL	America/Sao_Paulo
BRZLAN	America/Sao_Paulo
BRZLEAB	America/Fortaleza
BRZLWEC	America/Manaus

SAP time zone	IANA time zone
CET	Europe/Berlin
CHILE	America/Santiago
CHILEE	Pacific/Easter
CST	America/Chicago
CSTNO	America/Belize
CYPRUS	Asia/Nicosia
EET	Europe/Athens
EGYPTTEST	Africa/Cairo
EST	America/New_York
ESTNO	America/Jamaica
FIJI	Pacific/Fiji
FLKLND	Atlantic/Stanley
GMTUK	Europe/London
GST	Asia/Dubai
GSTEa	Asia/Dubai
INDIA	Asia/Kolkata
IRAN	Asia/Tehran
IRAQ	Asia/Baghdad
ISRAEL	Asia/Jerusalem
JAPAN	Asia/Tokyo
JORDAN	Asia/Amman
LBANON	Asia/Beirut
MAU	Indian/Mauritius
MOLDVA	Europe/Chisinau

SAP time zone	IANA time zone
MOROCCM	Africa/Casablanca
MST	America/Denver
MSTNO	America/Phoenix
NEPAL	Asia/Kathmandu
NORFLK	Pacific/Norfolk
NZCHA	Pacific/Chatham
NZST	Pacific/Auckland
PARAGY	America/Asuncion
PIERRE	America/St_Pierre
PKT	Asia/Karachi
PST	America/Los_Angeles
QAZ_05	Asia/Aqtobe
QAZ_06	Asia/Almaty
RUS02	Europe/Kaliningrad
RUS03	Europe/Moscow
RUS04	Europe/Samara
RUS05	Asia/Yekaterinburg
RUS06	Asia/Omsk
RUS07	Asia/Krasnoyarsk
RUS08	Asia/Irkutsk
RUS09	Asia/Yakutsk
RUS10	Asia/Vladivostok
RUS11	Asia/Magadan
RUS12	Asia/Kamchatka

SAP time zone	IANA time zone
RUS13	Asia/Anadyr
RUS14	Asia/Sakhalin
SYRIA	Asia/Damascus
TURKEY	Europe/Istanbul
URUGUA	America/Montevideo
UT-103	Pacific/Honolulu
UT-113	Pacific/Midway
UT-123	Etc/GMT+12
UT+103	Australia/Lord_Howe
UT+113	Pacific/Auckland
UT+123	Pacific/Chatham
UTC	Etc/UTC
UTC-1	Etc/GMT+1
UTC-2	Etc/GMT+2
UTC-3	Etc/GMT+3
UTC-4	Etc/GMT+4
UTC-5	Etc/GMT+5
UTC-6	Etc/GMT+6
UTC-7	Etc/GMT+7
UTC-8	Etc/GMT+8
UTC-9	Etc/GMT+9
UTC-10	Etc/GMT+10
UTC-11	Etc/GMT+11
UTC-12	Etc/GMT+12

SAP time zone	IANA time zone
UTC-33	America/St_Johns
UTC-43	America/Caracas
UTC-83	Pacific/Pitcairn
UTC-93	Pacific/Marquesas
UTC+1	Etc/GMT-1
UTC+2	Etc/GMT-2
UTC+3	Etc/GMT-3
UTC+4	Etc/GMT-4
UTC+5	Etc/GMT-5
UTC+6	Etc/GMT-6
UTC+7	Etc/GMT-7
UTC+8	Etc/GMT-8
UTC+9	Etc/GMT-9
UTC+10	Etc/GMT-10
UTC+11	Etc/GMT-11
UTC+12	Etc/GMT-12
UTC+33	Asia/Tehran
UTC+43	Asia/Kabul
UTC+53	Asia/Kolkata
UTC+63	Asia/Yangon
UTC+83	Australia/Eucla
UTC+93	Australia/Adelaide
WAT	Africa/Lagos
WDFT	Africa/Casablanca

SAP time zone	IANA time zone
WDT	Africa/Windhoek
WET	Europe/Lisbon

Notes

- This setting is stored in the general (tenant) configuration, so the same fallback time zone and mapping apply to all plants.

Related settings

- [Configure Operation Confirmation \(on page 103\)](#)

2.5. Configure SAP Inbound Synchronization

SAP inbound settings set the batch sizes, chunk sizes, page sizes, and delays used by the SAP inbound synchronization jobs.

Where it is configured

This setting is stored in the database as a configuration document of type `sapInboundConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>aggregationBatchSize</code>	Number	30	Batch size for aggregation during inbound synchronization.
<code>aggregationDeltaChunkSize</code>	Number	100	Chunk size for aggregating delta (changed) records.
<code>aggregationInboundChunkSize</code>	Number	100	Chunk size for aggregating inbound records.
<code>apiCallDelayMS</code>	Number	1000	Delay between API calls, in milliseconds.
<code>attachmentTopSize</code>	Number	100	Maximum number of attachment records requested in one call.
<code>inboundBatchSize</code>	Number	50	Batch size for inbound records.

Field	Type	Seed value	Description
<code>inboundTopSize</code>	Number	10000	Maximum number of inbound records requested in one call.
<code>referenceTable-BatchSize</code>	Number	1	Batch size for reference table records.
<code>referenceTopSize</code>	Number	100	Maximum number of reference table records requested in one call.

Sample configuration

```
"config" {  
  "aggregationBatchSize" 30,  
  "aggregationDeltaChunkSize": 100,  
  "aggregationInboundChunkSize" 100,  
  "apiCallDelayMS" 1000,  
  "attachmentTopSize" 100,  
  "inboundBatchSize" 50,  
  "inboundTopSize" 10000,  
  "referenceTableBatchSize" 1,  
  "referenceTopSize" 100  
},  
"type": "sapInboundConfig"
```

Related settings

- [Understand the Integration Workflow \(on page 56\)](#)
- [Exclude Plants from Initial Synchronization \(on page 72\)](#)

2.6. Exclude Plants from Initial Synchronization

The initial sync setting lists plants that are left out of the initial synchronization.

Where it is configured

This setting is stored in the database as a configuration document of type `initialSync`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>withoutPlant</code>	Array	<code>[]</code> (empty)	ERP plant IDs of the plants to exclude from initial synchronization. The seed list is empty, so no plants are excluded.

Sample configuration

```
"config" {
  "withoutPlant": []
}
"type" "initialSync"
```

Related settings

- [Configure SAP Inbound Synchronization \(on page 71\)](#)
- [Define Mobile Data Sync Preferences \(on page 177\)](#)

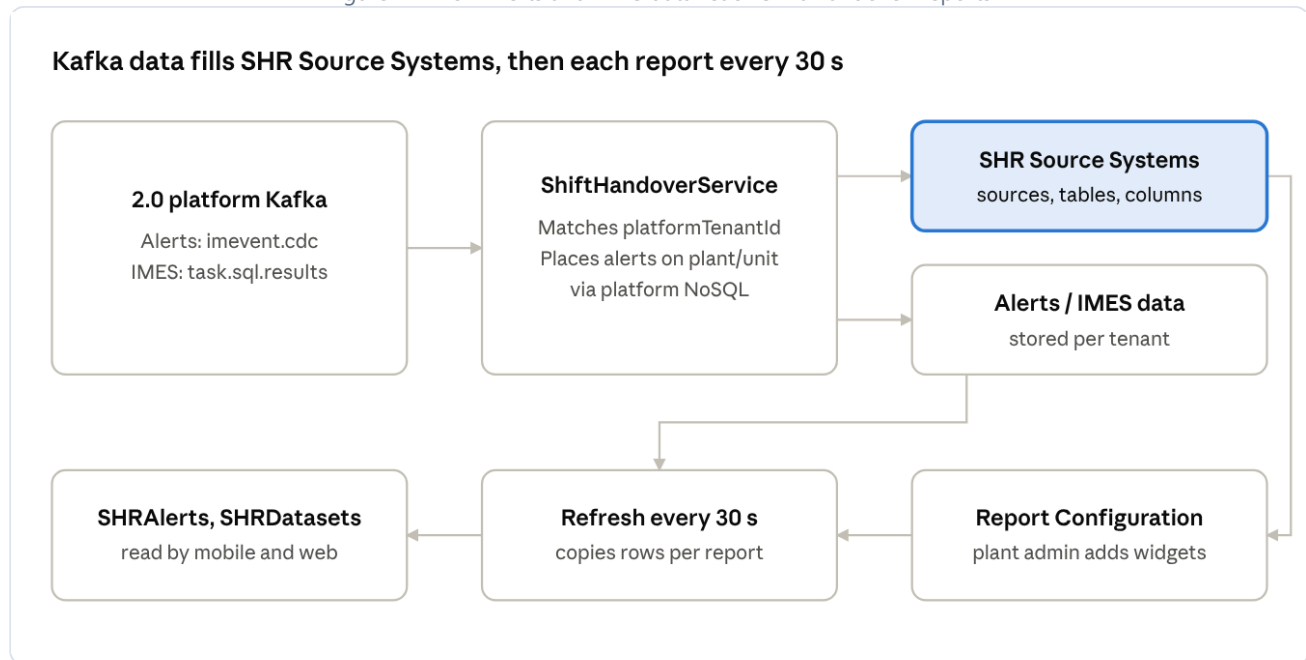
2.7. Connect Shift Handover Reports to Platform Alerts and IMES

Show platform Alerts and IMES query results in iMaintenance Shift Handover Reports.

If your deployment uses Shift Handover Reports with platform Alerts or IMES, Shift Handover Reports can show platform Alerts and IMES query results on web and mobile. Both arrive over Kafka from the 2.0 platform. The Shift Handover service stores them and refreshes open reports about every 30 seconds.

- Alerts appear in the built-in **Alerts** section, and in custom widgets limited to one source system (for example, only Seeq).
- IMES results appear in custom widgets as tables (for example, IMES Material).

Figure 7-1 How Alerts and IMES data reach Shift Handover Reports



Source systems

The **Source** and **Collection** lists in **Create Widget** fill themselves from Kafka. Nobody enters them by hand.

- The first alert from a system (for example Seeq) adds that system, in lowercase, with one collection, **alerts**, and its 12 fixed columns. Seeq and seeq stay one entry.
- Each IMES query result adds or updates the IMES entry with that result's table name and columns.

A source or collection appears in the lists only after data for it has arrived at least once.

Report data and offline use

Each new alert or IMES result marks the reports for that shift. Within about 30 seconds, the report data is updated: **SHRAlerts** holds one row for each report, and **SHRDatasets** one row for each custom widget. Mobile synchronizes this data and can then show it offline.

The built-in Alerts section shows alerts from every source system. A widget for one source, such as Seeq, shows only that source's alerts.

An alert reaches a report only when the platform maps it to a plant: its platform taxonomy node must carry a DYNAMO external ID that matches a CWP asset, location, or plant.

Who sets it up

1. The DevOps team runs the catalog migration, turns on the feature flags, fills the tenant configurations, links the tenant to the platform, and sets the Kafka consumers. See [Set Up Platform Alerts and IMES for Shift Handover](#) in the *iMaintenance Deployment & Setup Guide*.
2. A plant admin adds the Alerts and IMES sections and widgets to each plant's report configuration. See [Add Alerts and IMES Widgets to Shift Handover Reports](#) (on page 77).

2.7.1. Configure Shift Handover Alerts and IMES Settings

Control report visibility, badge colors, mobile row limits, and custom-section limits for the tenant.

Where it is configured

These settings are stored in the tenant catalog under `configurations`, not in the Configuration collection used by other settings. The catalog migration adds them with the defaults below and keeps values already set. The DevOps team applies changes.

Feature flags

The flags are under `configurations.featureFlags`. All default to `false`.

Flag	When true	When false
<code>enableSHRAAlerts</code>	Shows the Alerts section in plant report configuration, the Alerts tab in the report, and alert source systems (for example Seeq or Maximo) as widget sources.	Hides the Alerts section, tab, and alert widgets. Saved configuration is kept, so turning the flag back on restores it.
<code>enableSHRIMES</code>	Offers IMES as a widget source, processes IMES messages, and enables IMES refresh (refresh also needs <code>imesConfig.baseUrl</code>).	Skips IMES messages. Existing IMES widgets are hidden, not deleted.
<code>enableSHRCustomSections</code>	Shows the Add Section button in plant report configuration.	Hides the button. Sections already created stay listed and editable.
<code>enableSHRAAlertsUnified</code>	Clicking an alert row opens the unified alert view. Works only on the unified platform, not in standalone CWP.	Clicking a row does nothing. Keep this flag false until the unified view is available.

Alerts are stored whenever the Alerts consumer is enabled (`IMEVENT_KAFKA_ENABLED=true`), whatever the flag. `enableSHRAAlerts` controls only whether they are shown.

```
featureFlags: {  
  "enableSHRAAlerts": true,  
  "enableSHRIMES": true,  
  "enableSHRCustomSections": true,  
  "enableSHRAAlertsUnified": false
```

Tenant settings

These blocks sit next to `featureFlags` under `configurations`.

Key	What it does	Default
<code>shrAlertConfig.severityColors</code>	Badge color for each alert severity	critical #D92D20, major #FFAB40, medium #4DC7E7, minor #8F93A3
<code>shrAlertConfig.statusColors</code>	Badge color for each alert status	open #D92D20, in-progress #4F73FE, closed #12B76A
<code>shrAlertConfig.topN</code>	Maximum rows sent to mobile for each report and each widget, worst severity first	100 (maximum 500)
<code>shrBuilderLimits.maxSections</code>	Maximum custom sections for each plant	5 (maximum 20)
<code>shrBuilderLimits.maxWidgetsPerSection</code>	Maximum widgets in each custom section	5 (maximum 20)
<code>imesConfig.baseUrl</code>	TaskOrchestration API URL. When a report freezes, Shift Handover reruns the IMES queries tagged for the report units, so the frozen report has final data.	Empty: refresh is skipped and only streamed IMES data is shown

IMES widgets depend on the upstream iMES services, which publish IMES results to the Kafka topic `task.sql.results`. Your platform administrator sets up those services; see the separate iMES Platform Deployment and Administration runbook.

Keep `topN` at 100 unless a requirement calls for more. A larger list can exceed the 240 KB mobile sync limit, and devices then miss that report's updates.

Each widget shows up to five fields. This limit has no setting.

```
shrAlertConfig": {
  "severityColors": { "critical": "#D92D20", "major": "#FFAB40", "medium": "#4DC7E7", "minor": "#8F93A3" },
  "statusColors": { "open": "#D92D20", "in-progress": "#4F73FE", "closed": "#12B76A" },
  "topN": 100
},
shrBuilderLimits": {
  "maxSections": 5,
  "maxWidgetsPerSection": 5
},
imesConfig": {
  "baseUrl": "https://<platform-host>/task-orchestration"
```

2.7.2. Add Alerts and IMES Widgets to Shift Handover Reports

Add source-specific alert tables and IMES result tables to reports generated for a plant.

Before you begin

- The DevOps setup is complete. See [Connect Shift Handover Reports to Platform Alerts and IMES \(on page 73\)](#).
- The flags for the sources you want are on. See [Configure Shift Handover Alerts and IMES Settings \(on page 75\)](#).
- At least one message has arrived for each source and collection you want to select.

Changes apply to reports generated after you save. Reports already created keep their layout.

1. Check the report levels of the plant: in **Master Configurations > Plants**, edit the plant and check which levels are turned on (plant, unit, or position).

Alerts and IMES results reach only reports at the levels turned on.

2. Open **Shift Handover > Report Configuration** and select the plant.
3. To show all alerts from every source system, keep the built-in **Alerts** section selected.

This section is available when `enableSHRAAlerts` is on.

4. Click **Add Section**, and enter a **Section Name** (for example, Seeq Alerts) and a description.
5. In the new section, click **Add Widget**.
6. In **Create Widget**, enter the widget label and description (for example, Seeq Critical Alerts).
7. Set **Widget Type** to **Table**.
8. In **Source**, select an alert source system (for example, seeq) or IMES.

9. In **Collection**, select **alerts** for an alert source, or the IMES result table (for example, IMES Material).
10. In **Fields**, select up to five columns to show.

Widget	Source	Collection	Fields offered
Alerts from one system	seeq (or another listed alert source)	alerts	Title, Description, Severity, Status, Source System, Asset ID, Location ID, Unit ID, Position ID, Started At, Ended At, Plant ID
IMES table	IMES	Table name published by IMES	Columns of that IMES result

11. Check the preview, click **Create Widget**, and save the configuration.

Result

Reports generated after the change show the new sections and widgets. A widget added today does not appear on today's existing report; it appears on the next report generated.

Next action

If something is missing

- **Source missing in Create Widget:** no message from that source has arrived yet, or its flag (`enableSHRAAlerts` or `enableSHRIMES`) is off.
- **Alerts tab missing:** `enableSHRAAlerts` is off, or the Alerts section is not selected for the plant.
- **Widget empty on today's report:** the widget was added after the report was generated. Check the next shift's report.
- **No alerts for a plant:** the alert is not mapped to a plant on the platform, or the plant's report level is off. Ask the DevOps team to check the service logs.

3. Configure Shared Product Settings

Set shared module, navigation, branding, attachment, and list options, and see how database configuration documents are organized.

Many iMaintenance settings, in this chapter and in other chapters, are stored in the database rather than in the web application. Although they are stored at database level, they directly affect how technicians, supervisors, and administrators use the product every day. Functional teams should review these settings against their business processes. Your IT or implementation team applies the changes.



Note:

To change these settings, use the collection below in the database. Open the collection to view the list of configurations, each identified by its **type**.

Collection Name: Configuration

Settings are supplied at two levels: a general (tenant) configuration, which applies to the whole tenant, and a plant-specific configuration. Each reference topic states the level its seed values come from.

Related tasks

- [Enable or Disable Core Modules \(on page 79\)](#)
- [Configure Navigation Modules \(on page 81\)](#)
- [Configure Tenant Branding \(on page 84\)](#)
- [Configure Attachments \(on page 84\)](#)
- [Configure List Views \(on page 88\)](#)
- [Configure List Pagination \(on page 91\)](#)

3.1. Enable or Disable Core Modules

Turn the Issue, Work Order, and Timesheet modules on or off for the whole tenant or for individual plants.

These settings determine whether the modules are visible and accessible across the web and mobile applications.

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

1. Issue, Work Order, Timesheet Configurations

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

2. tenantLevel Flag

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

3. plantLevel Flag

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

Sample Configuration. The type is `issueConfig` for the Issue module; it changes for the Work Order and Timesheet modules.

```
{
  "_id": {
    "$oid": "6811d64e18c5da7d4d979883"
  },
  "type": "issueConfig",
  "config": {
    "tenantLevel": true,
    "plantLevel": true
  },
  "plant": {
    "$oid": "681a86b3aab43f5e132ff5c3"
  }
}
```

**Note:**

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

3.2. Configure Navigation Modules

The sidebar configuration controls which modules and submodules appear in the web application navigation.

Where it is configured

This setting is stored in the database as a configuration document of type `sidebar-config`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>modules</code>	Array	13 modules	List of navigation modules.
<code>modules[].moduleName</code>	String		Stored name of the module.
<code>modules[].enabled</code>	Boolean		Shows or hides the module.
<code>modules[].subModules</code>	Array		Submodules shown under the module.
<code>modules[].subModules[].subModuleName</code>	String		Stored name of the submodule.
<code>modules[].subModules[].enabled</code>	Boolean		Shows or hides the submodule.

Sample configuration (two modules shown)

```
"config" {
  "modules" [
    {
      "enabled" true,
      "moduleName" "maintenance",
      "subModules" [
        {
          "enabled": true,
          "subModuleName" "mccTitle"
        },
        {
          "enabled": true,
          "subModuleName" "notifications"
        },
        {
          "enabled": true,
          "subModuleName" "maintenanceFormsTitle"
        },
        {
          "enabled": true,
          "subModuleName" "archived"
        },
        {
          "enabled": true,
          "subModuleName" "delayReasons"
        }
      ]
    },
    {
      "enabled": true,
      "moduleName" "masterConfigurations",
      "subModules" [
        {
          "enabled": true,
          "subModuleName" "plantsTitle"
        },
        {
          "enabled": true,
          "subModuleName" "shiftsTitle"
        },
        {
          "enabled": true,
          "subModuleName" "locationsTitle"
        },
        {
          "enabled": true,
          "subModuleName" "assetsTitle"
        },
        {
          "enabled": true,
          "subModuleName" "unitOfMeasurement"
        },
        {
          "enabled": true,
          "subModuleName" "globalMcqHeading"
        },
        {
          "enabled": true,
          "subModuleName" "inactiveTitle"
        }
      ]
    }
  ]
},
{
  "type" "sidebar-config"
```

Modules in the seed

Purchasable modules ship turned off and are turned on by product flags when the configuration is seeded: `--mrounds`, `--minventory`, `--permits`, and `--dwi`.

moduleName	Seed state	Submodules (seed state)
<code>dashboards</code>	on	operations (off), kittingDashboard (off), EHS Dashboard (off)
<code>operations</code>	off	operatorRoundsTitle (on), shiftHandover (on), workflows (on), masterData (on)
<code>maintenance</code>	on	mccTitle (on), notifications (on), maintenanceFormsTitle (on), archived (on), delayReasons (on)
<code>environmentHealthSafety</code>	off	permits (on), jha (on), isolation (on), aiEngine (on), permitExpiryReports (on), archived (on), ehsTemplateAuthoring (on)
<code>inventoryTitle</code>	off	warehouseTitle (on), ewmTitle (on)
<code>digitalWorkInstructions</code>	off	(none)
<code>workSmartAi</code>	on	knowledgeRepository (on)
<code>forms</code>	off	formsManagementTitle (on), workflows (on)
<code>userManager</code>	on	activeUsers (on), positions (on), rolesPermissions (on), userGroupCount (on), inactiveUsers (on)
<code>raceTitle</code>	on	fieldConfigTitle (on), riskMatrixTitle (on), localisationTitle (on)
<code>integrationManager</code>	on	connectorsTitle (on), imConnectorsTitle (on), smartTriggerTitle (on), webhookRegistryTitle (on), alertsTitle (on)
<code>masterConfigurations</code>	on	plantsTitle (on), shiftsTitle (on), locationsTitle (on), assetsTitle (on), unitOfMeasurement (on), globalMcqHeading (on), inactiveTitle (on)
<code>tenantManagment</code>	on	(none)

Related settings

- [Access Modules \(on page 18\)](#)
- [Enable or Disable Core Modules \(on page 79\)](#)

3.3. Configure Tenant Branding

Set the tenant logo shown in the web application header.

Where it is configured

This setting is stored in the database as a configuration document of type `tenantBranding`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>logoUrl</code>	String	URL of an image file	URL of the tenant logo shown in the web header. The seed value points to an Innovapptive logo in the deployment environment. Replace it with the URL of your own logo.

Sample configuration

```
"config" {  
  "logoUrl" "https://your-tenant.example.com/assets/Images/logo.svg"  
}  
"type" "tenantBranding"
```

Related settings

- [Apply Theme Configurations \(on page 180\)](#)

3.4. Configure Attachments

Define attachment repositories, permitted actions, file-size limits, and video-duration limits for the supported iMaintenance records.

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

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

Table 8-1 Default Settings

Module	Repositories	Default App ID
Issue	GOS	NOATT
WorkOrder	GOS	WOATT
Asset	GOS, DMS	EQATT
FunctionalLocation	GOS, DMS	FLATT
MeasuringPoint	GOS, DMS	MPATT
MeansDoc	GOS, DMS	MDATT

Sample Configuration

```

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

```

**Note:**

- Repositories such as GOS and DMS must be configured with their respective url endpoints and supported actions (e.g., create, delete).
- DMS repositories support advanced configuration with documentTypesConfig to define rules like:
 - Document Type (e.g., DES, DRW)
 - Version/Part/Storage category.
- Admins should ensure that each module has a valid appld for integration consistency.

Attachment size and video length limits

The attachments configuration in the supplied general (tenant) seed also limits upload size and video length. These fields sit at the top level of `config`, next to the repository definitions.

Field	Type	Seed value	Description
<code>enable_attachment_size_limit</code>	Boolean	true	Turns the attachment size limit on or off.
<code>max_attachment_size_in_mb</code>	Number	40	Maximum attachment size, in MB.
<code>enable_video_duration_limit</code>	Boolean	true	Turns the video duration limit on or off.
<code>max_video_duration_in_sec</code>	Number	20	Maximum video duration, in seconds.

These limits apply to Issue and Work Order attachments. RACE field templates have their own upload limits, described in each template topic.

Sample from the supplied configuration seed:

```
"config" {
  "DMS" {
    "actions": [
      "create"
    ]
    "url": "/ICWP_INTEGRATION_SUITE_SRV/ProductAttachmentCollection"
  },
  "enable_attachment_size_limit": true,
  "enable_video_duration_limit": true,
  "GOS" {
    "actions": [
      "create"
      "delete"
    ]
    "url": "/ICWP_INTEGRATION_SUITE_SRV/ProductAttachmentCollection"
  },
  "Issue" {
    "appId" "NOATT",
    "repositories" [
      "GOS"
    ]
  },
  "max_attachment_size_in_mb": 40,
  "max_video_duration_in_sec": 20,
  "WorkOrder" {
    "appId" "WOATT",
    "repositories" [
      "GOS"
    ]
  }
},
"type": "attachments"
```

3.5. Configure List Views

Choose the columns, labels, data mappings, and date formatting shown in the Work Order, Issue, equipment, and functional location lists.

Each list view configuration controls which fields are visible, their labels, backend data mappings, and optional formatting types (for example, Date).

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

Table 8-2 Common Parameters

Field	Description
displayName	The label shown to the user in the column header (e.g., "Location").
keyName	The backend key to fetch data (e.g., location.name, asset.name).

Table 8-2 Common Parameters (continued)

type	Optional – used for formatting data (e.g., "date" for date fields).
order	Implicit – the order of entries in the fields array defines the column order in the UI.

Work Order List View

```

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

```

Issue List View

```

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

```

Equipment List View

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

Functional Location List View:

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



Note:

- All keyName values should map to valid fields defined in the corresponding module’s Field Configuration.
- The order of fields in the array defines the column order in the UI.
- Fields with type: "date" will be formatted as per locale/timezone rules.

List columns in the seed

The supplied general (tenant) seed contains these columns for each list type. The examples above show configurations from existing deployments with different columns.

Configuration type	Columns: displayName (keyName)
workOrderListTemplate	Functional Location (location.erpAssetId), Sort field (asset.sortField), Work Center (workCenter.erpWorkCenterId), Revision (others.revision)

Configuration type	Columns: displayName (keyName)
<code>issueListTemplate</code>	Description (description), Planning Plant (planningPlant.erpPlantId), Revision (others.revision), Code Group (others.codeGroupId), Work Center (workCenter.erpWorkCenterId), Location (location.name), Equipment (asset.name), Sort Field (asset.sortField), Code Id (others.codeId), Code Description (others.codeDescription)
<code>equipmentListTemplate</code>	Manufacturer Name (manufacturer.object.name), Sort Field (sortField), Technical Identification Number (others.technicalIdentificationNumber)
<code>functionalLocationListTemplate</code>	Manufacturer Name (manufacturer.object.name), Sort Field (sortField), Technical Identification Number (others.technicalIdentificationNumber)

Shared filter fields for mRounds and mWorkOrder

The `mRoundsAndmWorkOrder` configuration lists the filter fields shared by the mRounds and mWorkOrder applications. The seed list is: Plant, Unit, Location, Work Center, Task List, Asset Class, Asset.

```
"config" {
  "fields" [
    "Plant"
    "Unit"
    "Location"
    "Work Center"
    "Task List"
    "Asset Class"
    "Asset"
  ]
}
"type": "mRoundsAndmWorkOrder"
```

3.6. Configure List Pagination

List pagination settings set the date window and the minimum number of items per page for the Issue and Work Order lists.

Where it is configured

This setting is stored in the database as a configuration document of type `listConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>issuePagination-Config</code>	Object		Pagination settings for the Issue list.
<code>issuePagination-Config.days</code>	Number	70	Date window, in days, for the Issue list.
<code>issuePagination-Config.minItemsPerPage</code>	Number	10	Minimum number of items per page in the Issue list.
<code>workOrderPaginationConfig</code>	Object		Pagination settings for the Work Order list.
<code>workOrderPaginationConfig.days</code>	Number	30	Date window, in days, for the Work Order list.
<code>workOrderPaginationConfig.minItemsPerPage</code>	Number	10	Minimum number of items per page in the Work Order list.

Sample configuration

```
"config" {  
  "issuePaginationConfig" {  
    "days": 70,  
    "minItemsPerPage": 10  
  },  
  "workOrderPaginationConfig": {  
    "days": 30,  
    "minItemsPerPage": 10  
  },  
}  
"type": "listConfig"
```

Related settings

- [Configure List Views \(on page 88\)](#)

3.7. Configure User Experience Controls

Find the session, chat, attachment, list-view, and ERP mapping controls that affect everyday use of iMaintenance.

These settings apply product-wide and affect everyday use: how long a session stays active, whether chat and attachments are available, and how lists and ERP values are shown.

Configure Session Timeout

How long a session stays active during inactivity. See [Configure Session Timeout \(on page 38\)](#).

Configure Chat Controls

Chat on Issues and Work Orders, and chat push notifications. See [Configure Chat Controls \(on page 181\)](#).

Configure Attachments

Attachment repositories, actions, and size limits. See [Configure Attachments \(on page 84\)](#).

Configure List View

Columns shown in Work Order, Issue, equipment, and functional location lists. See [Configure List Views \(on page 88\)](#).

Configure Innovapptive Key Mapping

How ERP order types, statuses, priorities, and units map to iMaintenance. See [Configure Innovapptive Key Mapping \(on page 57\)](#).

IV. Configure Maintenance Work

Set the controls for Work Orders, assignments, Issues, equipment, functional locations, and measuring points.

Chapters

- [Configure Work Orders and Operations \(on page 95\)](#)
- [Configure the Maintenance Control Center \(MCC\) \(on page 107\)](#)
- [Configure Issues and SAP Notifications \(on page 116\)](#)
- [Configure Equipment and Functional Locations \(on page 123\)](#)
- [Configure Measuring Points \(on page 126\)](#)

1. Configure Work Orders and Operations

Set Work Order and Operation options for completion, tabs, timelines, timing, confirmations, follow-up Issues, and Timesheets.

These settings are stored in the database. Your IT or implementation team applies them. Use them to align Work Order execution with your organization's compliance, safety, and operational standards.

Completion controls

Whether a Work Order can be completed while forms or operations are still open. See [Configure Work Order Completion Controls \(on page 96\)](#).

Work Order and Operation tabs

Which tabs appear on the Work Order and Operation screens. See [Configure Work Order and Operation Tabs \(on page 97\)](#).

Work Order timeline

Whether the Work Order timeline is shown. See [Configure the Work Order Timeline \(on page 100\)](#).

Configure Auto Timer

Automatic timing of work execution. See [Configure Auto Timer \(on page 101\)](#).

Configure Raise Follow-up Issue

How follow-up issues are raised and linked to the Work Order. See [Configure Follow-up Issues \(on page 102\)](#).

Configure Operation Confirmation

Confirming operations before closure. See [Configure Operation Confirmation \(on page 103\)](#).

Timesheets

Timesheet enablement. See [Configure Timesheets \(on page 104\)](#).

Configure Work Order RCA

Recording Root Cause Analysis (RCA). See [Configure Work Order RCA \(on page 105\)](#).

Configure Raise Issue at Form Submission

Whether an Issue can be raised when a form is submitted. This setting is described in the Issues chapter. See [Configure Raise Issue on Form Submission \(on page 119\)](#).

Configure Measuring Points

Measuring point visibility across modules. This setting has its own chapter. See [Configure Measuring Points \(on page 126\)](#).

Assignment levels

Header-level and operation-level assignment. This setting is described in the MCC chapter. See [Configure Work Order Assignment Levels \(on page 110\)](#).

1.1. Configure Work Order Completion Controls

Block Work Order completion until required forms are submitted or operations are complete.

When a setting is `true`, the Work Order cannot be completed until its condition is met.

Where it is configured

This setting is stored in the database as a configuration document of type `workorderExecutionConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>waitUntilAllForms-Submit</code>	Boolean	false	When true, blocks completion while forms on the Work Order are not submitted.
<code>waitUntilAllOperationsComplete</code>	Boolean	false	When true, blocks completion while operations on the Work Order are not complete.

Sample configuration

```
"config" {  
  "waitUntilAllFormsSubmit" false,  
  "waitUntilAllOperationsComplete" false  
}  
"type" "workorderExecutionConfig"
```

Plant Settings

Four plant-level settings control where wrench loss appears: the Wrench Loss tab during Work Order execution, the wrench loss section on Operation Confirmation/Timesheet, the wrench losses section on the TECO screen, and editing of blocker durations in operation confirmation. All are off by default. When there is no blocking history, totals show 0.

Two permissions under Work Order Execution control blockers: Report Blocker – Operation and Unblock – Operation. They are independent, apply to every entry point, and hide the action when not granted.

Related settings

- [Configure Operation Confirmation \(on page 103\)](#)
- [Configure Work Order and Operation Tabs \(on page 97\)](#)

1.2. Configure Work Order and Operation Tabs

Tab settings control which tabs appear on the Work Order and Operation execution screens.

Each tab configuration is a list of tabs. Each entry has a **name** and an **enabled** flag. Set **enabled** to **false** to hide a tab. These settings are stored in the plant-specific configuration. Your IT or implementation team applies changes.

Turning a tab on shows the tab. It does not turn on the product or module behind the tab.

Work Order tabs

Stored as configuration type **workOrderTabConfig** in the plant-specific configuration.

name	Seed state	Position
details	on	1
operation	on	2
component	on	3

name	Seed state	Position
form	on	4
attachment	on	5
followUpIssue	on	6
permit	on	7
workInstructions	on	8
subWorkOrder	on	9
evidence	on	10
followOnWorkOrder	on	11
wrenchloss	on	12

The **wrenchloss** tab lists the wrench-loss categories with the cumulative hours for each category.

Operation tabs

Stored as configuration type **operationTabConfig** in the plant-specific configuration.

name	Seed state	Position
operation	on	1
component	on	2
attachment	on	3
permit	on	4
form	on	5
workInstructions	on	6
followOnWorkOrder	on	7
subOperation	off	8

Sample Work Order tab configuration

```
"config": [  
  {  
    "enabled": true,  
    "name": "details"  
  },  
  {  
    "enabled": true,  
    "name": "operation"  
  },  
  {  
    "enabled": true,  
    "name": "component"  
  },  
  {  
    "enabled": true,  
    "name": "form"  
  },  
  {  
    "enabled": true,  
    "name": "attachment"  
  },  
  {  
    "enabled": true,  
    "name": "followUpIssue"  
  },  
  {  
    "enabled": true,  
    "name": "permit"  
  },  
  {  
    "enabled": true,  
    "name": "workInstructions"  
  },  
  {  
    "enabled": true,  
    "name": "subWorkOrder"  
  },  
  {  
    "enabled": true,  
    "name": "evidence"  
  },  
  {  
    "enabled": true,  
    "name": "followOnWorkOrder"  
  },  
  {  
    "enabled": true,  
    "name": "wrenchloss"  
  }  
],  
"type": "workOrderTabConfig"
```

Sample Operation tab configuration

```
"config" : [
  {
    "enabled": true,
    "name": "operation"
  },
  {
    "enabled": true,
    "name": "component"
  },
  {
    "enabled": true,
    "name": "attachment"
  },
  {
    "enabled": true,
    "name": "permit"
  },
  {
    "enabled": true,
    "name": "form"
  },
  {
    "enabled": true,
    "name": "workInstructions"
  },
  {
    "enabled": true,
    "name": "followOnWorkOrder"
  },
  {
    "enabled": false,
    "name": "subOperation"
  }
],
"type": "operationTabConfig"
```

Related settings

- [Configure Issue Tabs \(on page 116\)](#)
- [Configure Work Order Completion Controls \(on page 96\)](#)

1.3. Configure the Work Order Timeline

Show or hide the Work Order timeline in the mobile app.

Where it is configured

This setting is stored in the database as a configuration document of type `workOrderTimelineConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>showTimeline</code>	Boolean	true	Shows the Work Order timeline in the mobile app when set to true.

Sample configuration

```
"config" {  
  "showTimeline": true  
}  
"type": "workOrderTimelineConfig"
```

Related settings

- [Configure Work Order and Operation Tabs \(on page 97\)](#)

1.4. Configure Auto Timer

Turn the automatic operation timer on or off, and choose whether technicians can edit it and whether time is calculated in the background.

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

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

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

Table 9-1 Default Settings

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

Sample Configuration

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

**Note:**

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

1.5. Configure Follow-up Issues

Choose whether follow-up Issues remain independent, link to the Work Order, or can be linked and later delinked.

The Raise Follow-up Issue Configuration defines how follow-up issues are handled when linked to a Work Order. This setting applies at the Tenant Level.

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

Table 9-2 Default Settings

Setting	Default Value	Description
tenantLevel	TRUE	Applies configuration across all plants under the tenant.
raiseFollowUpIssue	TRUE	Enables the follow-up issue creation capability.
independentIssue	FALSE	Follow-up is not created as standalone by default.
linkToWorkOrder	FALSE	Follow-up is not auto-linked only.

Table 9-2 Default Settings (continued)

linkAndDelinkToWorkOrder	TRUE	Follow-up is auto-linked, with an option to delink (default behavior).
--------------------------	------	--

Sample Configuration

```
"_id": {
  "$oid": "682495bc6f10a452d982a052"
},
"type": "raiseFollowUpIssueConfig",
"config": {
  "tenantLevel": true,
  "raiseFollowUpIssue": true,
  "independentIssue": false,
  "linkToWorkOrder": false,
  "linkAndDelinkToWorkOrder": true
}
```

**Note:**

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

1.6. Configure Operation Confirmation

Turn operation confirmations on or off during Work Order execution, at tenant or plant level.

The Operation Confirmation Configuration controls whether operation-level confirmations are enabled during Work Order execution. It can be managed at both the Tenant and Plant levels.

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

Table 9-3 Default Settings

Setting	Default Value	Description
tenantLevel	FALSE	Operation confirmation is not enabled at the tenant level by default

Table 9-3 Default Settings (continued)

plantLevel	FALSE	Operation confirmation is not enabled at any plant level by default
------------	-------	---

Sample Configuration

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

**Note:**

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

1.7. Configure Timesheets

The timesheet setting turns timesheet processing on at tenant or plant level.

Where it is configured

This setting is stored in the database as a configuration document of type `timeSheetConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
plantLevel	Boolean	false	Turns timesheet control on at plant level.

Field	Type	Seed value	Description
tenantLevel	Boolean	false	Turns timesheet control on at tenant level.

Sample configuration

```
"config" {  
  "plantLevel": false,  
  "tenantLevel": false  
}  
"type": "timeSheetConfig"
```

Notes

- Both flags are false in the seed.
- A timesheet entry is created along with the operation confirmation. See [Configure Operation Confirmation \(on page 103\)](#).

Related settings

- [Configure Operation Confirmation \(on page 103\)](#)
- [Enable or Disable Core Modules \(on page 79\)](#)

1.8. Configure Work Order RCA

Turn Root Cause Analysis recording on or off at Work Order and Operation level.

The Work Order RCA (Root Cause Analysis) Configuration defines whether RCA tracking is enabled at the Work Order and Work Order Operation levels, at either the Tenant or Plant level.

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

Table 9-4 Default Settings

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

Table 9-4 Default Settings (continued)

tenantLevel	TRUE	RCA settings apply across all plants by default.
workOrderLevel	TRUE	RCA is enabled at the Work Order level.
workOrderOperationLevel	TRUE	RCA is enabled for each Work Order operation.

Sample Configuration

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



Note:

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

2. Configure the Maintenance Control Center (MCC)

Set MCC card-movement rules, assignment options, and technician-list sources.

The **Maintenance Control Center (MCC)** helps supervisors plan, assign, and track maintenance work. The configuration settings in this chapter are stored in the database and applied by your IT or implementation team. To configure the fields shown in MCC, see the **Configure Fields** section in [Use the Maintenance Control Center \(MCC\) \(on page 112\)](#).

Related tasks

- [Configure MCC Kanban Movement Rules \(on page 107\)](#)
- [Configure Work Order Assignment Levels \(on page 110\)](#)
- [Configure Technician Lists for Assignment \(on page 111\)](#)
- Supervisor reference: [Use the Maintenance Control Center \(MCC\) \(on page 112\)](#), [Assign a Work Order to a Technician \(on page 113\)](#), and [Assign Work Order Operations to Technicians \(on page 114\)](#)

Issue review is covered in [Configure Issues and SAP Notifications \(on page 116\)](#).

2.1. Configure MCC Kanban Movement Rules

The MCC Kanban Board Movement Rules configuration lets tenant administrators define how work order cards move across sections (**Unassigned, Assigned, In Progress, Completed**) on the Maintenance Control Center Kanban board.

These configurations allow you to:

- Define one or more movement rules per Kanban section.
- Match rules using a combination of System Status, Header Assignment, Operation Assignment, Single Selection User Status, and Multi Selection User Status.
- Leave any field blank/undefined to treat it as "Any" (non-restrictive) for that rule.
- Fall back automatically to the existing hardcoded MCC logic when no rule matches, when the configuration is incomplete/invalid, or when a work order matches rules across multiple sections.

Rule fields

Table 10-1 Rule Fields

Field	Description
Section	Target MCC Kanban section: Unassigned, Assigned, In Progress, or Completed

Table 10-1 Rule Fields (continued)

Work Order System Status	SAP system status condition (e.g., Created, Released, In Progress, Completed, Technically Completed)
Work Order Header Assignment	Unassigned / Assigned
Operation Assignment	Unassigned / Partially Assigned / Fully Assigned
Single Selection User status	Single active SAP User Status value
Multi Selection User Status	One or more concurrently active SAP User Status values

How the example works: the example below defines four sections. A Work Order that is Created or Released goes to **Unassigned** when neither the header nor all of its operations are assigned, and to **Assigned** when the header is assigned or all operations are fully assigned. A Work Order that is In-Progress goes to **In Progress**. A Work Order that is Completed or Closed goes to **Completed**. Each rule combines its conditions with the **logic** value (AND in this example) and has an **order** value.

Example configuration

```
"_id": {
  "$oid": "6a9e95f4cf7954db35f3fd1a"
},
"type": "mccKanbanConfig",
"plant": {
  "$oid": "6893fe5568cb9da3b5ed54ef5"
},
"config": {
  "sections": [
    {
      "key": "unassigned",
      "metaData": {
        "enabled": true,
        "order": 1,
        "label": "Unassigned",
        "color": ""
      },
      "rules": [
        {
          "logic": "AND",
          "order": 1,
          "conditions": [
            {
              "field": "systemStatus",
              "operator": "IN",
              "value": [
                "Created",
                "Released"
              ]
            }
          ],
          {
            "field": "headerAssignment",
            "operator": "IN",
            "value": [
              "unassigned"
            ]
          },
          {
            "field": "operationAssignment",
            "operator": "IN",
            "value": [
              "unassigned",
              "partiallyAssigned"
            ]
          }
        ]
      }
    },
    {
      "key": "assigned",
      "metaData": {
        "enabled": true,
        "order": 2,
        "label": "Assigned",
        "color": ""
      },
      "rules": [
        {
          "logic": "AND",
          "order": 1,
          "conditions": [
            {
              "field": "systemStatus",
              "operator": "IN",
              "value": [
                "Created",
                "Released"
              ]
            }
          ],
          {
            "field": "headerAssignment",
            "operator": "IN",
            "value": [
              "assigned"
            ]
          },
          {
            "field": "operationAssignment",
            "operator": "IN",
            "value": [
              "assigned",
              "partiallyAssigned"
            ]
          }
        ]
      }
    }
  ]
}
```

2.2. Configure Work Order Assignment Levels

Assignment settings turn header-level and operation-level Work Order assignment on or off, and can limit operation assignment to selected control keys.

Where it is configured

This setting is stored in the database as a configuration document of type `workOrderAssignmentConfig`. The values below are from the plant-specific configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>headerLevelAssignment</code>	Boolean	true	Turns assignment at the Work Order header level on or off. Header-level assignment does not depend on control keys.
<code>operationAssignmentControlKeys</code>	Array	[] (empty)	Control keys for operation-level assignment. The technician assignment option for an operation is visible only when the operation control key is in this list. The seed list is empty.
<code>operationLevelAssignment</code>	Boolean	true	Turns assignment at the operation level on or off.

Sample configuration

```
"config" {  
  "headerLevelAssignment": true,  
  "operationAssignmentControlKeys": [],  
  "operationLevelAssignment": true  
}  
"type": "workOrderAssignmentConfig"
```

Related settings

- [Assign a Work Order to a Technician \(on page 113\)](#)
- [Assign Work Order Operations to Technicians \(on page 114\)](#)
- [Configure Technician Lists for Assignment \(on page 111\)](#)

2.3. Configure Technician Lists for Assignment

The technician list setting decides where the list of technicians comes from when work is split across technicians: all technicians in the plant, or technicians in the work center.

Where it is configured

This setting is stored in the database as a configuration document of type `workOrderUtilityConfig`. The values below are from the plant-specific configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>allTechnicianList</code>	Boolean	true	Offers the plant-wide list of technicians.
<code>tenantLevel</code>	Boolean	true	Applies the setting at tenant level.
<code>workCenterBased-TechnicianList</code>	Boolean	true	Offers the list of technicians for the work center.

Sample configuration

```
"config" {  
  "allTechnicianList": true,  
  "tenantLevel": true,  
  "workCenterBasedTechnicianList": true  
}  
"type": "workOrderUtilityConfig"
```

Notes

- Both list sources are true in the seed. When both are true, the user sees the total list.

Related settings

- [Configure Work Order Assignment Levels \(on page 110\)](#)
- [Assign Work Order Operations to Technicians \(on page 114\)](#)

2.4. Supervisor Reference: Use MCC

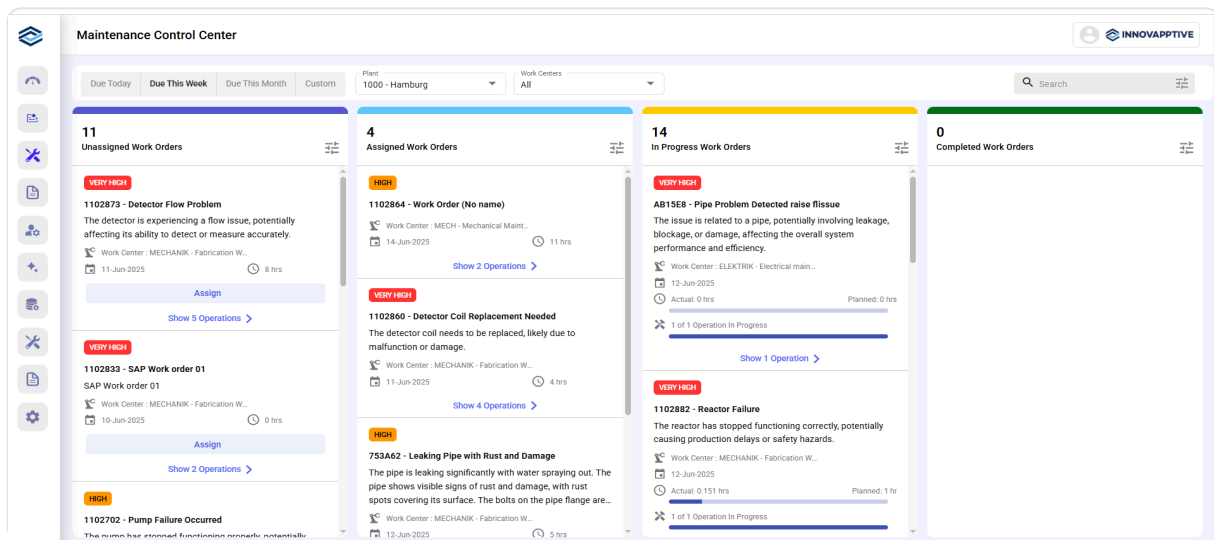
2.4.1. Use the Maintenance Control Center (MCC)

Find Work Orders by status, search and filter the board, adjust displayed fields, and access assignment actions.

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

In this module, you can,

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



View Work Orders by Status

Work orders are categorized into the following tabs:

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

Search and Filter

You can:

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

Configure Fields

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

To Configure:

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

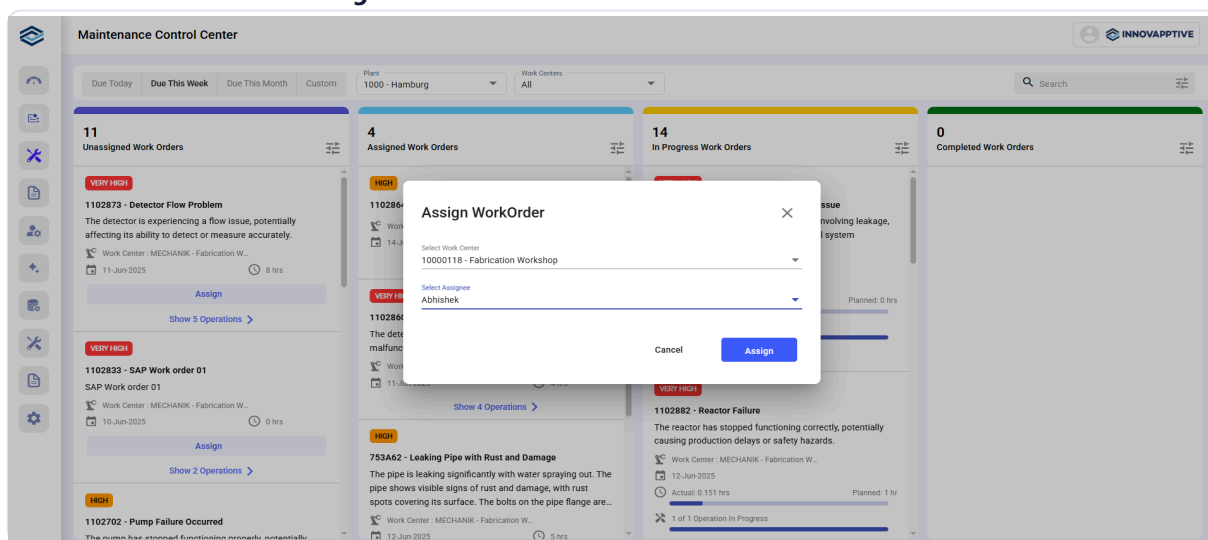
2.4.2. Assign a Work Order to a Technician

Assign a Work Order to a technician by selecting the Work Center and assignee in MCC.

Work orders can be assigned directly from the Unassigned Work Orders list. Work Order (header) assignment does not depend on control keys.

To assign a work order to a technician:

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



3. Click **Assign**.

You can also click **Assign** for the desired work order directly in the **Maintenance Control Center** screen.

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

On sites configured for task-level assignment, assign technicians to specific Work Order tasks based on the craft each task needs. MCC shows real-time technician and crew capacity so you can assign, reassign or release tasks.

5. Click **Assign**.

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

Work Orders are scheduled by Scheduled Start date. Supervisors see the whole site queue; technicians see only their assigned tasks.

2.4.3. Assign Work Order Operations to Technicians

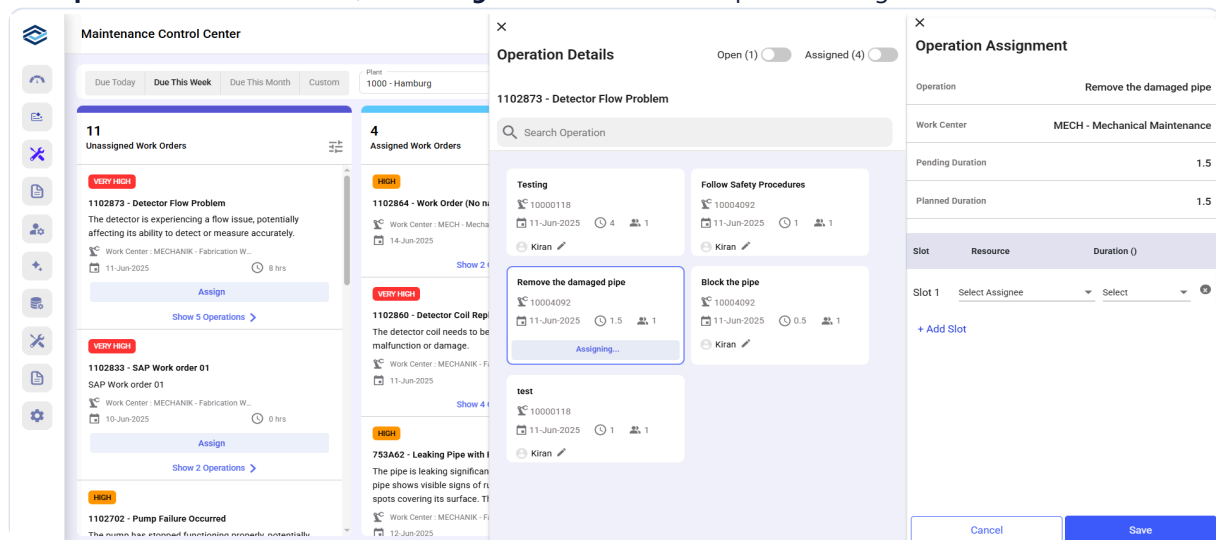
Assign operation work to one or more technicians and specify the duration for each assignment.

To assign a work order at the header level, see [Assign a Work Order to a Technician \(on page 113\)](#).

The technician assignment option appears only for operations whose control key is set in the assignment configuration. See [Configure Work Order Assignment Levels \(on page 110\)](#).

To assign a work order at the operation level:

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



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

**Note:**

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

3. Configure Issues and SAP Notifications

Set Issue tabs and Issue Slip options, control Issue creation from forms, and find the supervisor tasks for reviewing and updating Issues.

In the web application, Issues are listed in the **Notifications** module. The settings in this chapter are stored in the database and applied by your IT or implementation team. Email and push alerts are covered in [Configure Chat and Notifications \(on page 181\)](#).

- [Configure Issue Tabs \(on page 116\)](#)
- [Configure the Issue Slip \(on page 118\)](#)
- [Configure Raise Issue on Form Submission \(on page 119\)](#)
- [Review Notifications \(Supervisor Reference\) \(on page 119\)](#) (supervisor reference)

To set up the risk matrix used to set Issue priority, see [Configure Risk Evaluation with the Risk Matrix \(on page 166\)](#).

3.1. Configure Issue Tabs

The Issue tab setting controls which tabs appear on the Issue detail screen.

The configuration is a list of tabs. Each entry has a **name** and an **enabled** flag. Set **enabled** to **false** to hide a tab.

The **attachment** and **evidence** tabs are separate entries and can be shown or hidden independently.

Where it is configured

This setting is stored in the database as a configuration document of type **issueTabConfig**. The values below are from the plant-specific configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Sample configuration

```
"config" : [
  {
    "enabled": true,
    "name": "details"
  },
  {
    "enabled": true,
    "name": "items"
  },
  {
    "enabled": true,
    "name": "causes"
  },
  {
    "enabled": true,
    "name": "tasks"
  },
  {
    "enabled": true,
    "name": "activities"
  },
  {
    "enabled": true,
    "name": "attachment"
  },
  {
    "enabled": true,
    "name": "evidence"
  }
],
"type": "issueTabConfig"
```

Tabs in the seed

name	Seed state	Position
details	on	1
items	on	2
causes	on	3
tasks	on	4
activities	on	5
attachment	on	6
evidence	on	7

Related settings

- [Configure Work Order and Operation Tabs \(on page 97\)](#)
- [Configure the Issue Slip \(on page 118\)](#)

3.2. Configure the Issue Slip

Turn the customer-specific Issue Slip on or off at tenant or plant level.

Where it is configured

This setting is stored in the database as a configuration document of type `issueSlipConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>isIssueSlipEnabled</code>	Boolean	true	Turns the Issue Slip feature on or off.
<code>plantLevel</code>	Boolean	false	Applies the setting at plant level.
<code>tenantLevel</code>	Boolean	true	Applies the setting at tenant level.

Sample configuration

```
"config" {  
  "isIssueSlipEnabled": true,  
  "plantLevel": false,  
  "tenantLevel": true  
}  
"type": "issueSlipConfig"
```

Notes

- The Issue Slip is a customer-specific feature. Turn it on only for customers that use it.
- The same configuration type also exists in the plant-specific configuration, with the same seed values.

Related settings

- [Configure Issue Tabs \(on page 116\)](#)

3.3. Configure Raise Issue on Form Submission

Control whether an Issue can be raised when a form is submitted, at tenant or plant level.

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

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

Table 11-1 Default Settings

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

Sample Configuration

```
{
  "_id": {
    "$oid": "6821e6077218a319b2e8bb88"
  },
  "type": "raiseIssue",
  "config": {
    "formLevel": false
  },
  "plant": {
    "$oid": "681a06b3aab43f5e132ff5c3"
  }
}
```



Note:

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

3.4. Review Notifications (Supervisor Reference)

Review reported Issues and update their details or priority from the Notifications module.

The Notifications module lets supervisors view and manage issues reported through the iMaintenance mobile app. These issues are typically tied to specific assets and locations within a plant. This is daily supervisor work, included for reference.

Related tasks

- [View Notifications \(on page 120\)](#)
- [Edit Issue Details \(on page 120\)](#)
- [Change Priority with Risk Matrix \(on page 121\)](#)

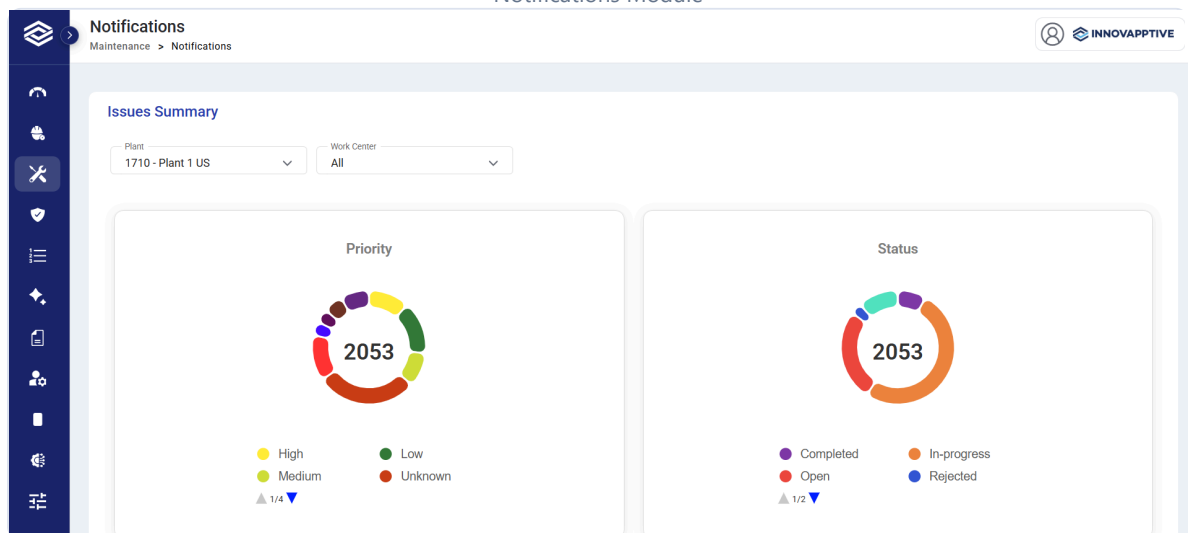
3.4.1. View Notifications

Open the Notifications module to review reported Issues, their status, priority, and related plant or location.

To access observations:

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

Figure 11-1
Notifications Module



3.4.2. Edit Issue Details

Update an Issue's priority, start date and time, and due date and time.

To edit issue details:

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

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

<
Pump Issue >

No Log History

Title	Pump Issue
Description	* The pump is not functioning correctly, potentially causing disruptions in the industrial process.
Plant	Hamburg
Plant Timezone	--
Location	K1-ZPW-1 - Inlet pump plant - spiral pump
Asset	10000957 - Pump bearing k1-zpw1 FL
Task	--
Priority	High
Status	Open
Start Date And Time	Jun 11, 2025, 7:20 PM 📅
Due Date and Time	Jun 25, 2025, 7:20 PM 📅
Assigned To	--
ERP Notification	10047575
Raised By	Kiran Marri
Attachments	0

3.4.3. Change Priority with Risk Matrix

Evaluate an Issue with the risk matrix and apply the resulting priority.

To change priority:

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

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

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

The screenshot shows the 'Preview Matrix' dialog box. The 'Matrix Name' is 'PAER Matrix'. Under the 'People' section, the question 'What is the potential impact on people in the event of this risk materializing?' has input fields for 'Catastrophic', 'Major', 'Moderate', and 'Low'. The question 'What is the likelihood of this risk occurring?' has input fields for 'Almost Certain', 'Likely', 'Possible', and 'Negligible'. The 'Assets' section follows a similar structure. The background interface shows a list of matrices on the left and a table of created matrices on the right.

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

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

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

4. Configure Equipment and Functional Locations

Configure which asset statuses appear in asset filters, the map feature, and geo-tag actions.

Equipment and functional locations are created and maintained in [Maintain Master Configurations \(on page 49\)](#). List columns for equipment and functional locations are set in [Configure List Views \(on page 88\)](#). Measuring points are covered in [Configure Measuring Points \(on page 126\)](#).

- [Configure Asset Visibility by SAP Status \(on page 123\)](#)
- [Configure the Map Feature \(on page 124\)](#)
- [Configure Geo-Tag Actions \(on page 125\)](#)

4.1. Configure Asset Visibility by SAP Status

Control whether assets with the SAP statuses DLFL and INAC appear in iMaintenance.

Where it is configured

This setting is stored in the database as a configuration document of type `assetFilter`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>DLFLallowed</code>	Boolean	true	When false, hides assets with SAP status <code>DLFL</code> throughout iMaintenance.
<code>INACallowed</code>	Boolean	true	When false, hides assets with SAP status <code>INAC</code> throughout iMaintenance.
<code>tenantLevel</code>	Boolean	true	Applies the setting at tenant level.

Sample configuration

```
"config" : {  
  "DLFLallowed": true,  
  "INACallowed": true,  
  "tenantLevel": true  
},  
"type": "assetFilter"
```

Related settings

- [Create an Asset \(on page 52\)](#)

4.2. Configure the Map Feature

Turn Google Maps on or off in iMaintenance for a plant.

Where it is configured

This setting is stored in the database as a configuration document of type **map**. The values below are from the plant-specific configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
enabled	Boolean	true	Turns Google Maps on or off.

Sample configuration

```
"config" : {  
  "enabled": true  
},  
"status": 1,  
"type": "map"
```

Related settings

- [Configure Geo-Tag Actions \(on page 125\)](#)

4.3. Configure Geo-Tag Actions

Geo-tag settings control the view, set, update, and remove geo-tag actions.

Where it is configured

This setting is stored in the database as a configuration document of type `geoTagConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>removeGeoTag</code>	Boolean	true	Allows removing a geo-tag.
<code>setGeoTag</code>	Boolean	true	Allows setting a geo-tag.
<code>updateLocation</code>	Boolean	true	Allows updating a location.
<code>viewLocation</code>	Boolean	true	Allows viewing a location.

Sample configuration

```
"config" : {
  "removeGeoTag": true,
  "setGeoTag": true,
  "updateLocation": true,
  "viewLocation": true
},
"type" : "geoTagConfig"
```

Notes

- The same configuration type also exists in the plant-specific configuration, with the same seed values.

Related settings

- [Configure the Map Feature \(on page 124\)](#)

5. Configure Measuring Points

Show or hide measuring points in each module at tenant or plant level, and include them in synchronization.

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

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

Table 13-1 Default Settings

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

Sample Configuration

```
{
  "_id": {
    "oid": "67fdffef33f2f7a34586bf3"
  },
  "type": "measuringPointConfig",
  "config": {
    "tenantLevel": true,
    "functionalLocation": true,
    "workOrder": true,
    "workOrderOperation": true,
    "issue": true,
    "asset": true,
    "asset360": true,
    "realmSync": true,
    "plantLevel": true
  },
  "plant": {
    "oid": "681a96b3aab43f5e132ff5c3"
  }
}
```



Note:

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

To add measuring points to a form, see [Add a Measuring Point Section \(on page 127\)](#).

5.1. Add a Measuring Point Section

Add a form section that displays measuring points by category for the selected equipment or functional location.

Form creators can add this section while authoring or publishing the form. It connects to the **Equipment (EQ)** and **Functional Location (FLOC)** headers, so mobile users can view and record the relevant MP readings directly in the form.

To add or configure the measuring point section:

1. Add Measuring Point Section

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

2. Select EQ/FLOC with Measuring Point Category.

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

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

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

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

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

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

3. Publish Form

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

b. On mobile, the section will:

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

Mobile Experience

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

Figure 13-1 Add Measuring Points

The screenshot shows a form titled "Add Measuring Point Sections" with a subtitle: "Each selected category will create a separate section in the form for both Equipment and Functional Location measuring points." Below the subtitle, there are two rows of configuration options:

Equipment	Category ▼
Functional Location	Category ▼

V. Configure Forms and Field Templates

Design data-capture forms, define field templates and risk matrices, and publish interface translations.

Chapters

- [Design and Manage Forms \(on page 130\)](#)
- [Configure Field Templates with RACE \(on page 141\)](#)
- [Configure Risk Evaluation with the Risk Matrix \(on page 166\)](#)
- [Manage Localization \(on page 173\)](#)

1. Design and Manage Forms

Create and publish forms manually or with AI, define field properties and assignment rules, and manage existing forms.

Forms capture structured field data in the iMaintenance mobile application.

Related tasks

- [Create and Publish Forms \(on page 130\)](#)
- [Auto Assign Forms \(on page 135\)](#)
- [Add a Measuring Point Section \(on page 127\)](#) (in [Configure Measuring Points \(on page 126\)](#))
- [Response Types and Field Properties \(on page 132\)](#)
- [Use Generative AI to Create Forms \(on page 137\)](#)
- [Edit, Copy, or Archive a Form \(on page 140\)](#)
- [Bulk Upload Forms \(on page 140\)](#)

1.1. Create and Publish Forms

Build and publish a form with pages, sections, questions, response types, and field properties.

These forms can be tailored to different inspection or reporting scenarios.

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

To create and publish a form:

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

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

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

For auto-assignment, see [Auto Assign Forms \(on page 135\)](#). For measuring point sections, see [Add a Measuring Point Section \(on page 127\)](#).

Figure 14-1 Add Form Details

The screenshot shows the 'Form Details' screen in the iMaintenance configuration tool. The screen has a header with a 'Back to List' button and a 'Next' button. The main content area is divided into two sections. The top section, titled 'Form Details', contains the following fields: 'Form Name' (with a red asterisk), 'Description', 'Instance Type' (with a red asterisk), 'Plant' (with a red asterisk), and 'Tags'. The bottom section, titled 'Auto Assign Form', contains the text 'Auto Assign Form at field level' and an 'Add' button.

5. Click **Next**.

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

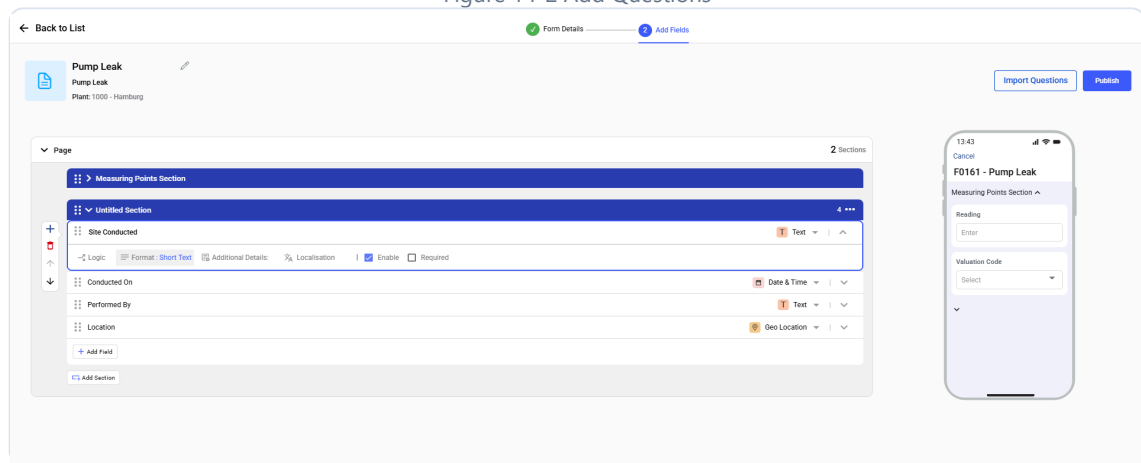
- Add **Pages**, then **Sections** within each page.
- Insert **Fields (Questions)** into sections.
- Select **Response Type** (text, multiple choice, slider, etc.)
- Rename, reorder, or delete fields and change response types as needed.
- Rename sections to match your workflow.

For the list of response types, see [Response Types and Field Properties \(on page 132\)](#).

For what each response type property does, see the property table in the same topic.

You can also set conditions or logic (for example, show or hide a field based on an answer), mark fields as **Required**, enable **History**, or apply **Localization**.

Figure 14-2 Add Questions

The screenshot displays the 'Add Questions' interface for a form named 'Pump Leak'. At the top, there's a navigation bar with 'Back to List', 'Form Details', and 'Add Fields' (the current active tab). Below this, the form structure is shown with a 'Measuring Points Section' and an 'Untitled Section'. The 'Untitled Section' contains four fields: 'Site Conducted' (Text), 'Conducted On' (Date & Time), 'Performed By' (Text), and 'Location' (Geo Location). Each field has a dropdown for its response type and checkboxes for 'Enable' and 'Required'. On the right, a 'Preview' button is visible, and a mobile app preview shows the form as it would appear on a device.

- Use **Preview** (right side) to see how the form appears in the mobile app.

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

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

To edit, copy, or archive the form later, see [Edit, Copy, or Archive a Form \(on page 140\)](#).

1.2. Response Types and Field Properties

Choose form response types and review the properties available for each type.

Response types

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

Response Type	Description	Supported Properties
Array List	Field group (e.g., items, causes).	Additional Details, Localization, Enable, Required, Input Data.
Date Range	Selects a start and end date.	Additional Details, Localization, Enable, Required
Attachments	Uploads documents or files (PDFs, DOCs, Voice, Image, etc.).	Additional Details, Localization, Enable, Required, Attachment Details
Checkbox	Boolean input for Yes/No selection.	Add Logic, Additional Details, Localization, Enable, Required
Toggle	UI toggle for ON/OFF selection.	Add Logic, Localization, Enable, Required.
Risk Matrix	Triggers a configurable risk priorities drop-down values	Add Logic, Additional Details, Localization, Enable, Required
Scan Search Text	Scan barcode to search and drop-down to select values.	Add Logic, Localization, Enable, Required, Input Data
Insert Image	Add a single image	Additional Details, Localization, Enable, Required

- Set conditions or logic (e.g., show/hide based on answers) as shown in the below table.
- Mark fields as **Required**, enable **History**, or apply **Localization**.

Response type properties

Add Logic	Enables conditional rules for a field (show/hide Field/Section, Raise Issue, Mandatory field/Section etc.) based on field values.
Default Value	Pre-fills the field with a value when the form loads in mobile application.
Additional Details	Allows admin to define character limit or extra metadata for users.
Localization	Allows admin to translate field labels into multiple languages.
Enable	Toggles whether the field is active and visible in the consumption.
Required	Marks the field as mandatory for submission.

Input Data	Allow admin to define collection of dataset for field.
Unit	Allows admins to select a unit of measurement (e.g., °C, Kg, hrs) to numeric fields.
History	Allows admin stores previous values entered in the field.
Range	Sets a minimum and maximum limit for values (typically in number or slider).
Formula	Supports calculated values based on other Numeric field inputs.
Date & Time	Allows admin to define which date format should be used in the consumption.
Add Link	Allows the field to point to an external URL or system reference.
Type	Defines the technical input format (e.g., string, number, object) – mostly system-managed.
Upload Files	Allows users to attach images, PDFs, or documents to the field.
Add Tags	Lets admin apply metadata tags for filtering, grouping, or analytics.

1.3. Auto Assign Forms

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

Configure Auto Assignment

To configure auto assignment:

1. Add Auto Assignment Rule

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

2. Define Assignment Criteria

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

a. Functional Location / Equipment

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

b. Work Order Type

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

c. Maintenance Plan

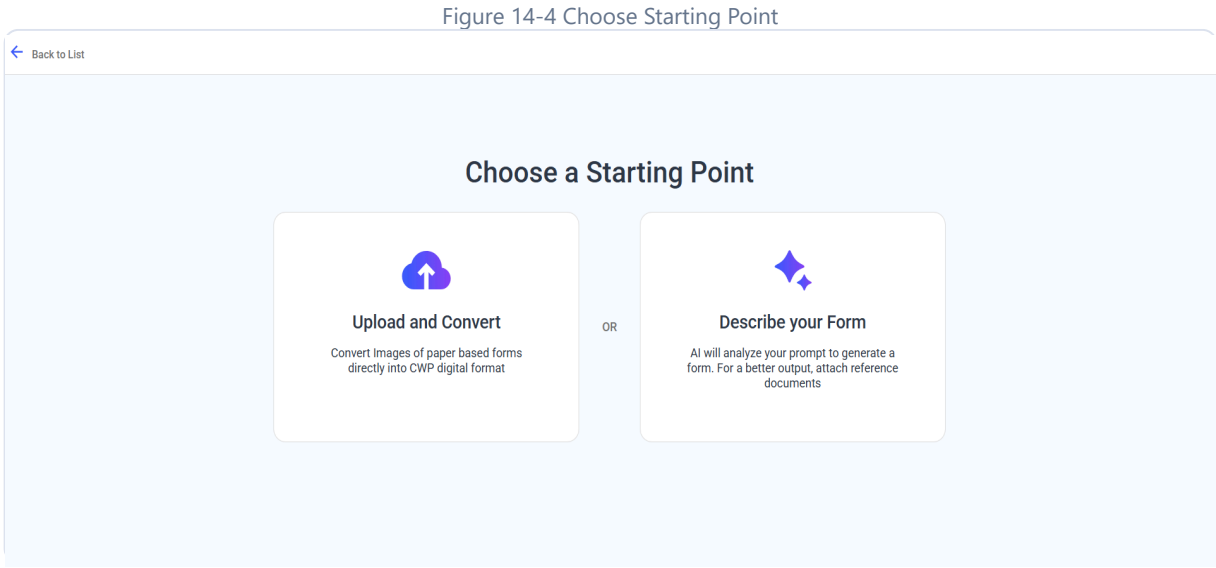
- Displays all available maintenance plans.
- Multi-select support is available.

d. Task List

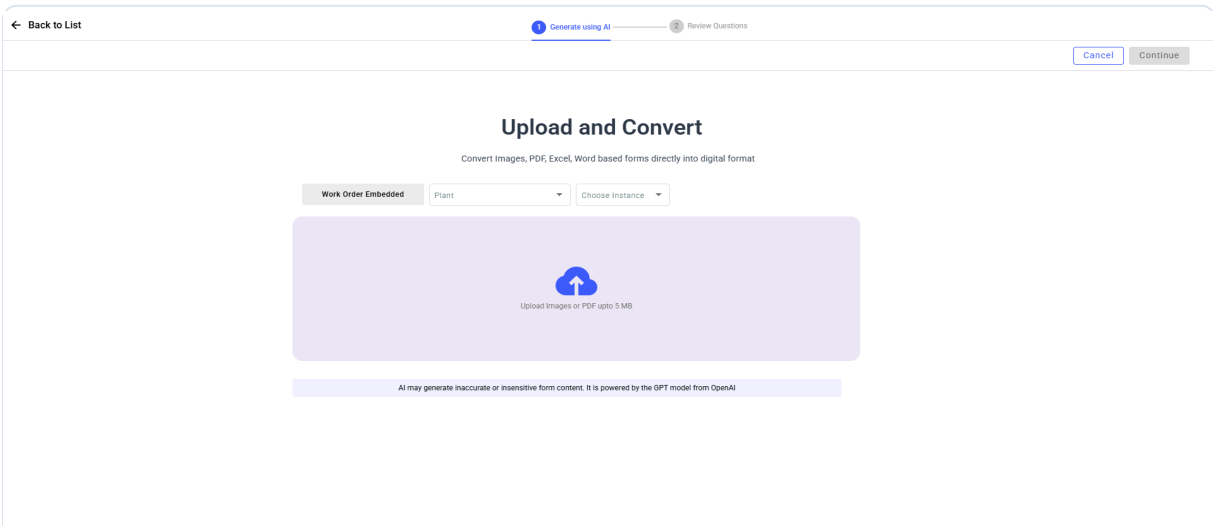
- Displays task lists.
- Supervisors can select one or more lists for auto-assignment.

Upload and Convert

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



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



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

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

Figure 14-5 Review Questions

Describe Your Form

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

4. (Optional) Attach reference documents.

5. Click **Enter**.

AI generates the form with relevant sections and fields.

6. Click **Continue**.

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

8. Click **Publish**.

Form Management Actions

To edit, copy, or archive a form, see [Edit, Copy, or Archive a Form \(on page 140\)](#).

1.5. Edit, Copy, or Archive a Form

Manage forms from the **My Forms** screen, whether you created them manually or with AI.

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

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

Archived forms appear in the Archived module.

1.6. Bulk Upload Forms

Create multiple forms by completing and uploading the supplied Excel template.

To bulk upload forms:

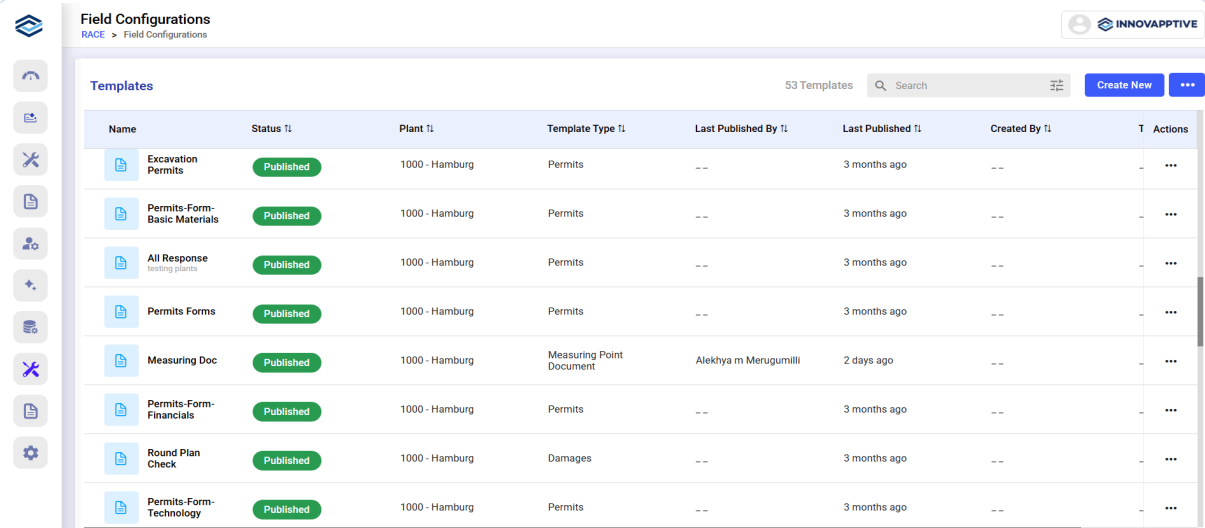
1. Expand **Forms** and select **Embedded Forms**.
2. Click the More icon on the top right corner and select **Download Excel Template**.
3. Fill out the Excel sheet.
4. Click **Create New** > **Upload Excel**.
5. Select and upload the file.

2. Configure Field Templates with RACE

Create and publish field templates for Work Orders, Issues, operations, components, items, causes, activities, and tasks.

Use field templates in **RACE (Rapid Application Configuration Engine)** to define which fields appear on Work Orders, Issues, operations, components, items, causes, activities, and tasks in the mobile app, and how each field behaves. These configurations require no code changes.

Figure 15-1 Field Configurations



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

Related tasks

- [Create Field Templates \(on page 141\)](#)

RACE is also used to localize the platform's language: see [Manage Localization \(on page 173\)](#). Risk matrices are covered in [Configure Risk Evaluation with the Risk Matrix \(on page 166\)](#). Mobile data sync preferences by role are set in [Define Mobile Data Sync Preferences \(on page 177\)](#).

2.1. Create Field Templates

Create a field template for a selected record type and plant, define its fields, and publish it for mobile use.

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

To create and publish a template:

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

Figure 15-2 Create New

Field Configurations

RACE > Field Configurations

INNOVAPPTIVE

Templates

53 Templates

Search

Create New

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

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

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

Figure 15-3 Template Details Screen

The screenshot displays the 'Template Details' screen. At the top, there is a navigation bar with a 'Back to List' link, a progress indicator showing '1 Template Details' and '2 Add Fields', and 'Cancel' and 'Next' buttons. The main form area is titled 'Template Details' and contains the following fields:

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

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

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

Figure 15-4 Add Fields Screen

The screenshot displays the 'Add Fields' screen for a 'Control Valve Maintenance' form. The top navigation bar includes 'Back to List', 'Template Details', and 'Add Fields'. The main area shows a list of fields to be added, each with a dropdown for its response type. The fields are: 'Site Conducted' (1.controls), 'Conducted On' (Date & Time), 'Performed By' (Text), 'Location' (Geo Location), and 'label' (Text). There are also checkboxes for 'Enable', 'Required', and 'Allow Multi-Select', and a 'Key Name' field. A 'Publish' button is in the top right. On the right, a mobile preview shows the form layout on a smartphone screen.



Note:

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

2.1.1. Configure Work Order Creation Template

Define the fields captured when creating a Work Order, including priority, equipment, dates, assignment, and attachments.

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

To configure a work order template:

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

Figure 15-5 Work Order Template

The screenshot shows the 'Template Details' screen for a Work Order template. The screen has a header with a 'Back to List' link, a progress indicator showing '1 Template Details' and '2 Add Fields', and 'Cancel' and 'Next' buttons. The main content area contains a form with the following fields:

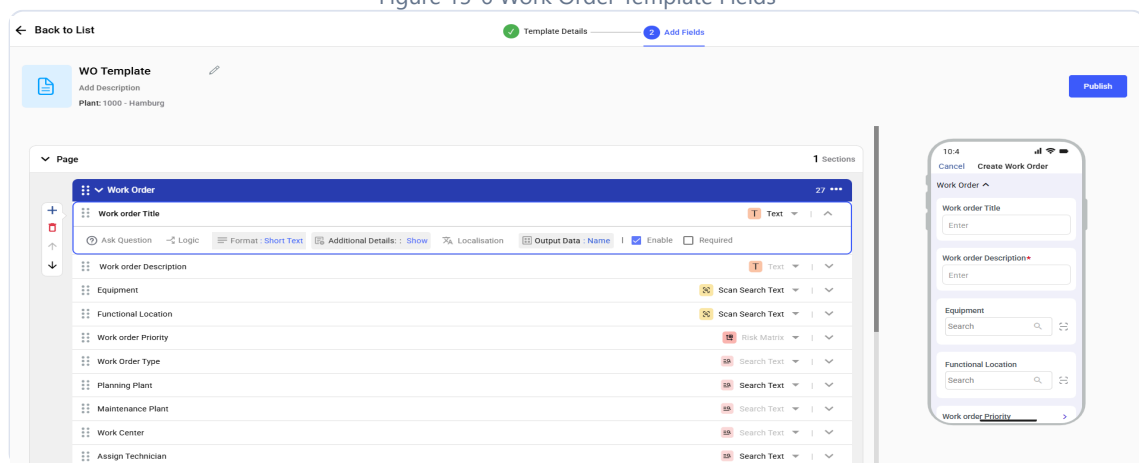
- Template Type ***: A dropdown menu with 'Workorder' selected.
- Template Name ***: A text input field containing 'WO Template'.
- Description**: A text input field with the placeholder 'Add Description'.
- Plant ***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with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

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

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

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

Figure 15-6 Work Order Template Fields



5. Click **Publish**.

2.1.2. Configure Issue Creation Template

Define the fields captured when creating an Issue, including its title, priority, equipment, location, and dates.

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

To configure an issue template:

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

Figure 15-7 Issue Template

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

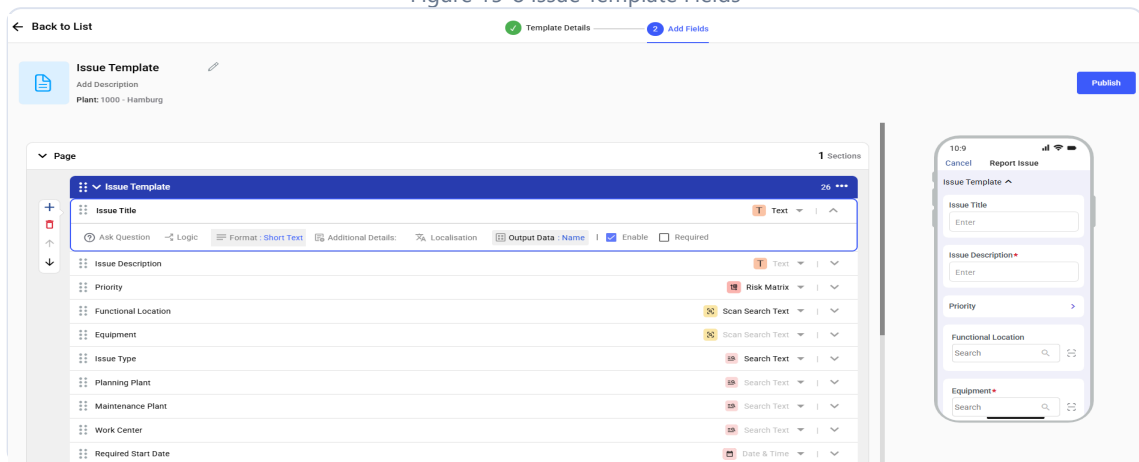
- Template Type**: A dropdown menu with 'Issues' selected.
- Template Name**: A text input field containing 'Issue Template'.
- Description**: A text input field with the placeholder 'Add Description'.
- Plant**: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with the placeholder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

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

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

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

Figure 15-8 Issue Template Fields



5. Click **Publish**.

2.1.3. Configure Operation Template

Define operation fields for a Work Order, including work center, control key, resources, effort, duration, and dates.

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

To configure an operation template:

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

Figure 15-9 Operation Template

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

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

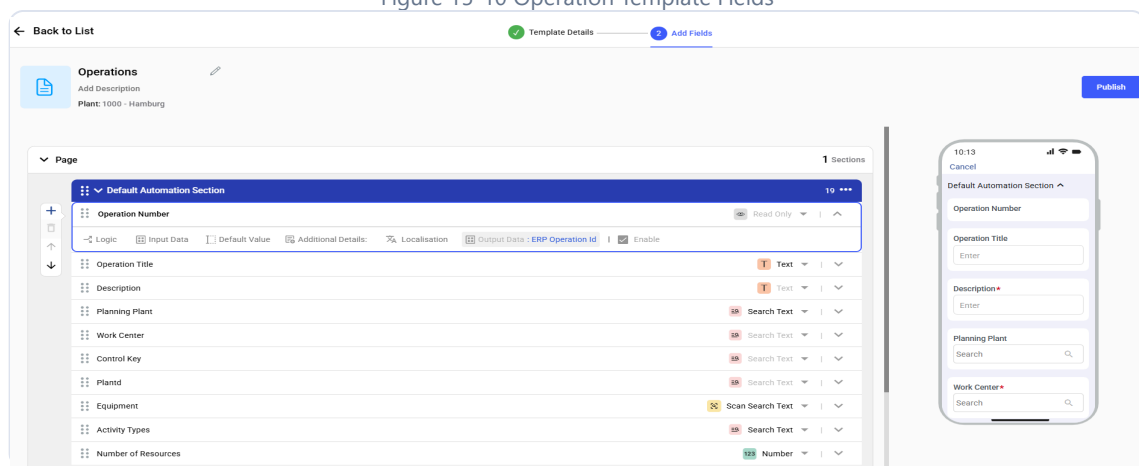
At the bottom right of the screen, there are 'Cancel' and 'Next' buttons.

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

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

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

Figure 15-10 Operation Template Fields



5. Click **Publish**.

2.1.4. Configure Component Template

Define the component fields captured for a Work Order, including material, quantity, storage location, and linked operation.

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

To configure a component template:

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

Figure 15-11 Component Template

← Back to List

1 Template Details 2 Add Fields

Cancel Next

Template Details

Template Type *

Component

Template Name *

Components

Description

Add Description

Plant *

1000 - Hamburg

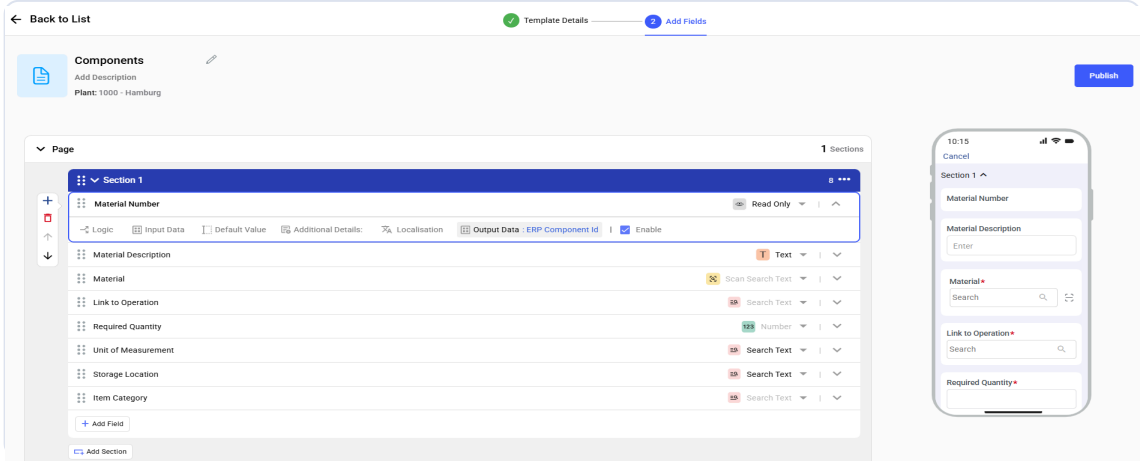
Tags

Start typing to see tags

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

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

Figure 15-12 Component Template Fields



5. Click **Publish**.

2.1.5. Configure Item Template

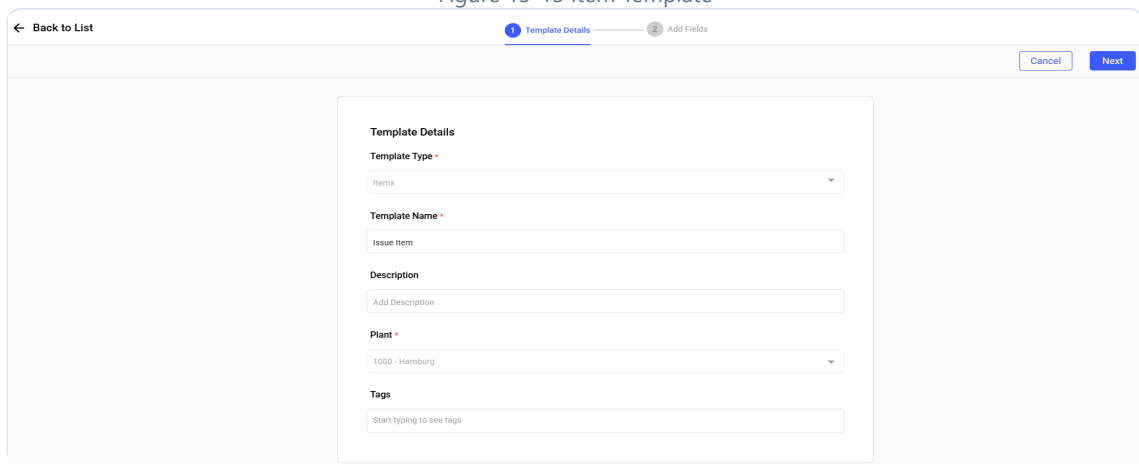
Define the item fields captured for an Issue, including object-part and damage codes and the item description.

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

To configure an item template:

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

Figure 15-13 Item Template



The screenshot displays the 'Template Details' screen for an Item Template. At the top, there is a 'Back to List' button on the left and a progress bar in the center with two steps: '1 Template Details' (active) and '2 Add Fields'. On the right side of the top bar are 'Cancel' and 'Next' buttons. The main content area contains a form titled 'Template Details' with the following fields:

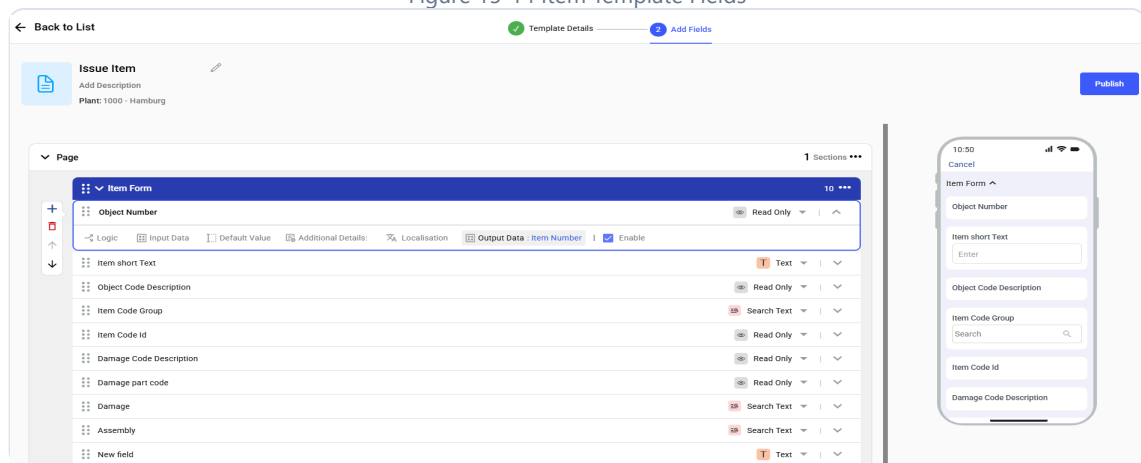
- Template Type ***: A dropdown menu with 'Items' selected.
- Template Name ***: A text input field containing 'Issue Item'.
- Description**: A text input field with the placeholder 'Add Description'.
- Plant ***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with the placeholder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

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

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

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

Figure 15-14 Item Template Fields



5. Click **Publish**.

2.1.6. Configure Cause Template

Define the cause fields captured for an Issue, including the related item, code group, code, and cause text.

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

To configure a cause template:

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

Figure 15-15 Cause Template

The screenshot displays the 'Template Details' screen for a Cause Template. The interface includes a top navigation bar with a 'Back to List' link, a progress indicator showing '1 Template Details' and '2 Add Fields', and 'Cancel' and 'Next' buttons. The main form area contains the following fields:

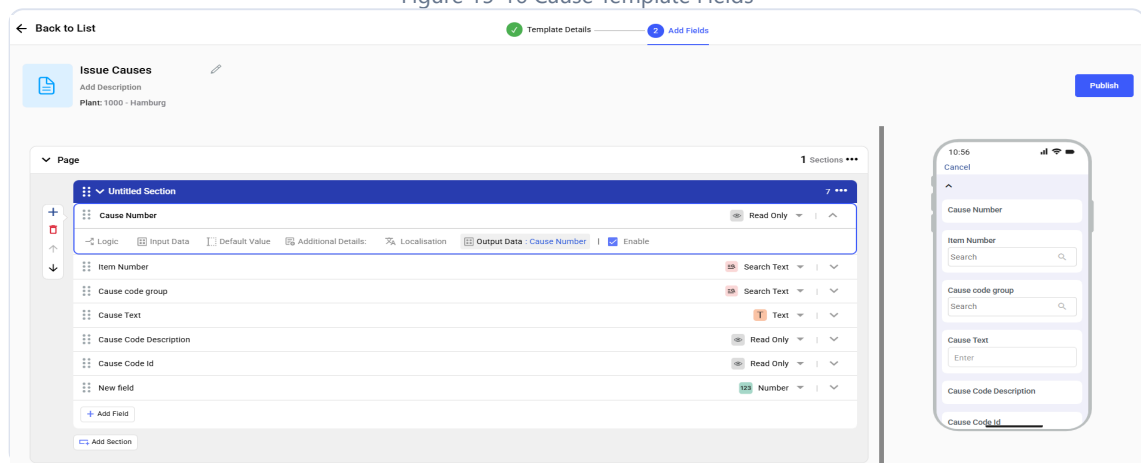
- Template Type ***: A dropdown menu with 'Causes' selected.
- Template Name ***: A text input field containing 'Issue Causes'.
- Description**: A text input field with the placeholder 'Add Description'.
- Plant ***: A dropdown menu with '1000 - Hamburg' selected.
- Tags**: A text input field with the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

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

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

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

Figure 15-16 Cause Template Fields



5. Click **Publish**.

2.1.7. Configure Activity Template

Define the activity fields captured for an Issue, including activity numbers, codes, and descriptions.

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

To configure an activity template:

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

Figure 15-17 Activity Template

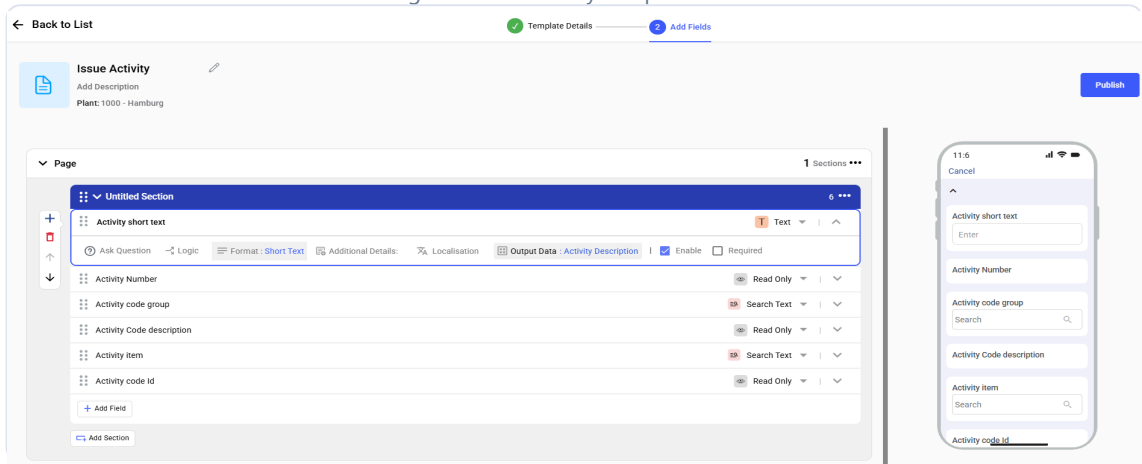
The screenshot displays the 'Template Details' screen for an Activity Template. The interface includes a top navigation bar with a 'Back to List' button on the left and 'Cancel' and 'Next' buttons on the right. A progress indicator at the top shows '1 Template Details' and '2 Add Fields'. The main form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

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

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

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

Figure 15-18 Activity Template Fields



5. Click **Publish**.

2.1.8. Configure Task Template

Define the task fields captured for an Issue, including task numbers, code groups, codes, and descriptions.

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

To configure a task template:

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

Figure 15-19 Task Template

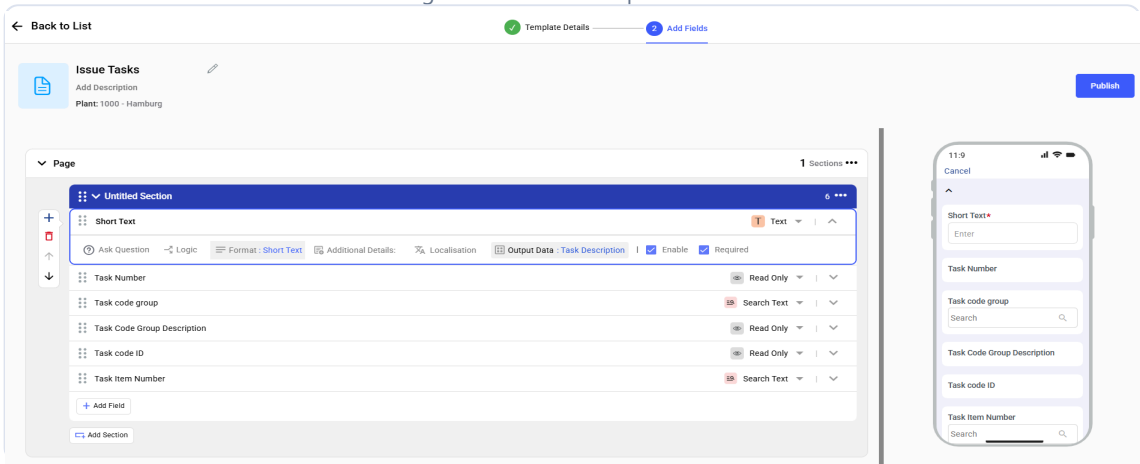
The screenshot displays the 'Template Details' screen for a Task Template. The interface includes a top navigation bar with a 'Back to List' link, a progress indicator showing '1 Template Details' and '2 Add Fields', and 'Cancel' and 'Next' buttons. The main form area contains the following fields:

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

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

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

Figure 15-20 Task Template Fields



5. Click **Publish**.

3. Set Up Delay Reasons

Delay reasons are the choices technicians see when they report a blocked operation.

For each reason, add optional sub-reasons, assign it to a plant, and name the user group responsible for clearing it.

Search, filter, edit, copy or delete reasons as your plants change.

1. Expand the RACE module and click Web Permissions.
2. Click on iMaintenance.
3. Click on Delay Reasons and assign Create, Edit, View, Copy and Delete.

4. Configure Status Actions

Configure the mobile status actions, the Maximo status each one maps to, and the reason codes for each hold or delay state. You can make a reason required per action; the reason selector is hidden when no reasons apply. Role permissions control who can change a Work Order's status. Settings apply at the Work Order level and the Activities and Tasks level, and existing status configurations continue to work.

5. Configure Risk Evaluation with the Risk Matrix

Use a risk matrix to define how risks are evaluated and prioritized, so that inspections, observations, and safety reports are rated the same way.

A risk matrix combines what could happen with how likely it is. You define:

- **Consequences:** up to five consequence categories, such as People, Assets, and Environment, each with its own evaluation question and severity levels.
- **Likelihood:** up to seven likelihood cases.
- **Priorities:** the risk result for each consequence and likelihood combination, its response timeframe, and how it maps to ERP priority indicators.
- **Colors:** the color for each consequence, likelihood case, and matrix cell.

You build and change the matrix in RACE without development work. When you publish it, the matrix is available for incident reporting and form configurations, and supervisors use it to set Issue priority. To change the criteria later, edit the matrix and publish it again.

For the setup steps, see [Create a Risk Matrix \(on page 166\)](#).

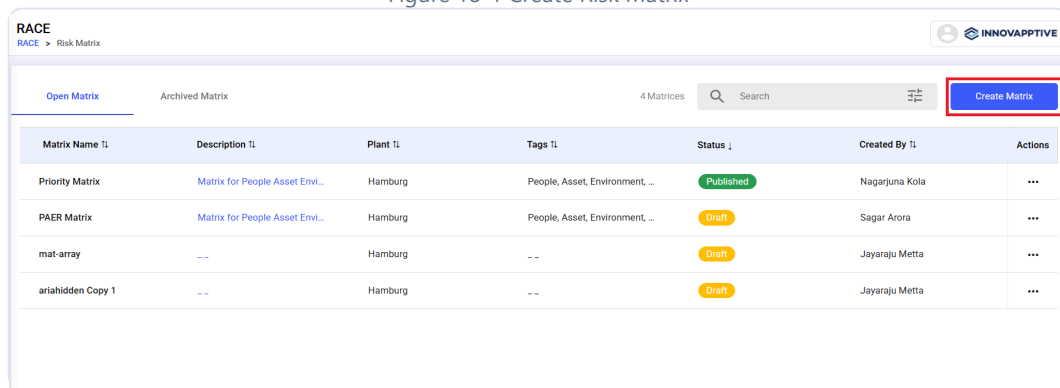
5.1. Create a Risk Matrix

Define consequences, likelihood, priorities, and colors, then preview and publish a risk matrix.

To create a risk matrix:

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

Figure 18-1 Create Risk Matrix



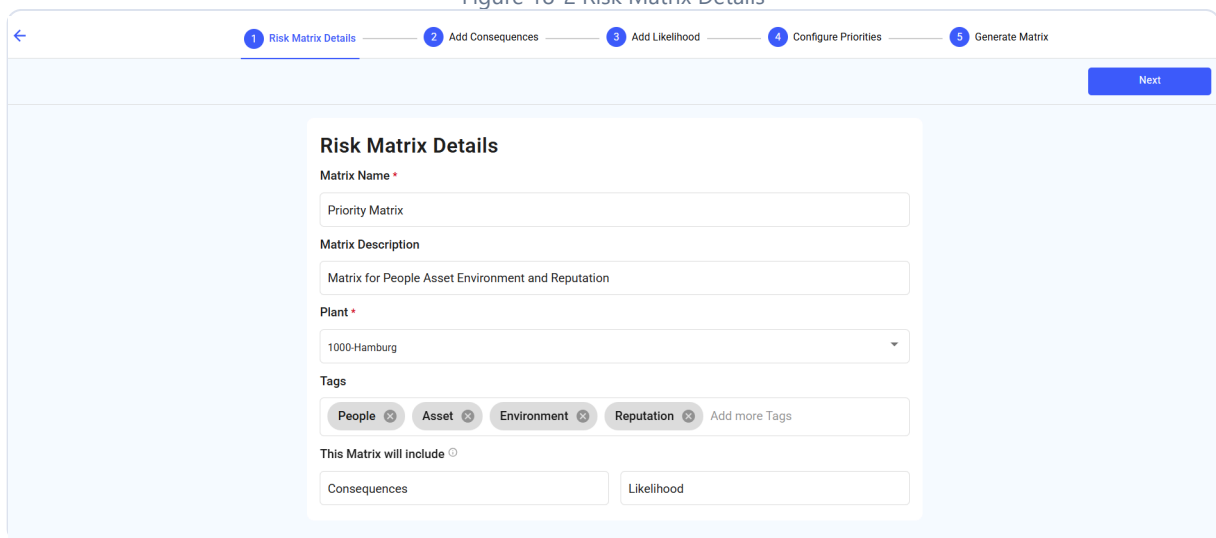
The screenshot shows the 'RACE > Risk Matrix' interface. At the top, there are tabs for 'Open Matrix' and 'Archived Matrix'. Below the tabs, there is a search bar and a 'Create Matrix' button highlighted with a red box. The main area contains a table with the following data:

Matrix Name ?!	Description ?!	Plant ?!	Tags ?!	Status ?!	Created By ?!	Actions
Priority Matrix	Matrix for People Asset Envi...	Hamburg	People, Asset, Environment, ...	Published	Nagarjuna Kola	...
PAER Matrix	Matrix for People Asset Envi...	Hamburg	People, Asset, Environment, ...	Draft	Sagar Arora	...
mat-array	--	Hamburg	--	Draft	Jayaraju Metta	...
ariahidden Copy 1	--	Hamburg	--	Draft	Jayaraju Metta	...

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

- Matrix Name
- Matrix Description
- Plant
- Category (Issue or Work Order)
- Type
- Prioritization Profile
- Tags
- Define matrix components (e.g., Consequences, Likelihood)
- Click **Next**.

Figure 18-2 Risk Matrix Details



The screenshot shows the 'Risk Matrix Details' form. At the top, there is a progress bar with five steps: 1. Risk Matrix Details (active), 2. Add Consequences, 3. Add Likelihood, 4. Configure Priorities, and 5. Generate Matrix. A 'Next' button is located at the top right. The form fields are as follows:

- Matrix Name ***: Text input field containing 'Priority Matrix'.
- Matrix Description**: Text input field containing 'Matrix for People Asset Environment and Reputation'.
- Plant ***: Dropdown menu showing '1000-Hamburg'.
- Tags**: A row of tags: 'People', 'Asset', 'Environment', and 'Reputation', each with a close button. An 'Add more Tags' button is to the right.
- This Matrix will include**: Two checkboxes, 'Consequences' and 'Likelihood', both of which are selected.

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

Figure 18-3 Add Consequences

←

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

Previous
Next

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

+ Add level (Max 7)

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



You can add maximum 7 cases.

- Click **Next**.

Figure 18-4 Add Likelihood

[Risk Matrix Details](#)
[Add Consequences](#)
[Add Likelihood](#)
[Configure Priorities](#)
[Generate Matrix](#)

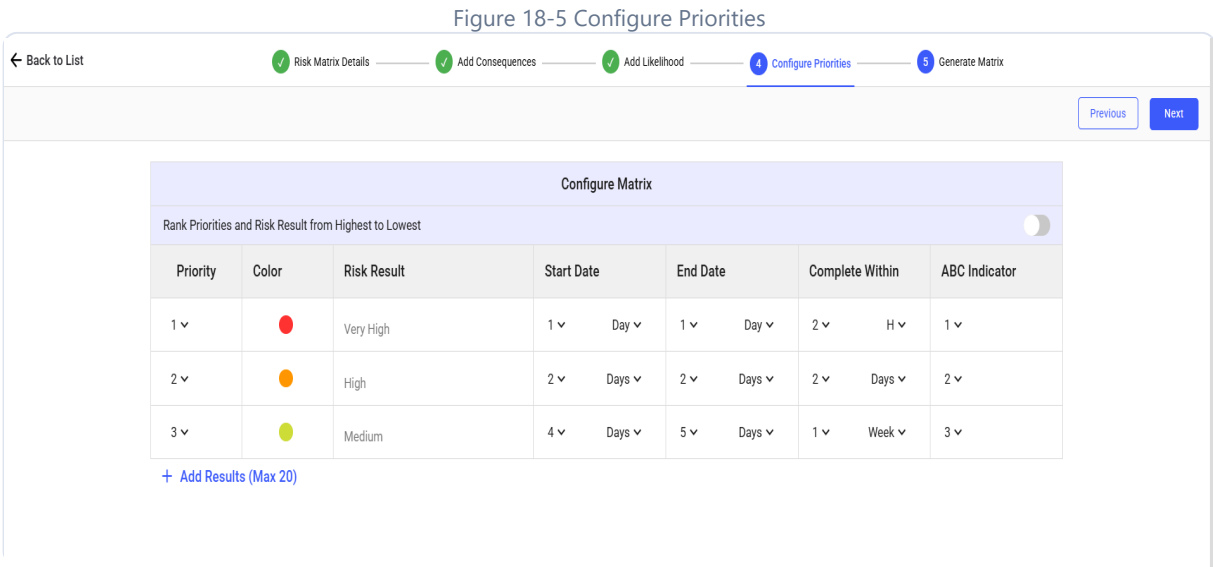
Previous Next

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

[+ Add Case \(Max 7\)](#)

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

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



7. In the **Generate Matrix** screen, generate the matrix:

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

Figure 18-6 Matrix Preview

Preview Matrix

Matrix Name

Priority Matrix

People

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

Catastrophic

Major

Moderate

Low

What is the likelihood of this risk occurring?

Almost Certain

Likely

Possible

Negligible

Assets

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

- Click **Publish**.

Figure 18-7 Generate Matrix

Risk Matrix Details

Add Consequences

Add Likelihood

Configure Priorities

5

Generate Matrix

Preview

Previous

Publish

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

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

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

5.2. Configure Risk Matrix Priority Colors

The risk matrix setting turns ERP-supported risk matrix priority colors on or off.

Where it is configured

This setting is stored in the database as a configuration document of type `riskMatrixConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>erpSupported</code>	Boolean	false	Turns ERP-supported risk matrix priority colors on or off.
<code>priorityColorMap</code>	Object	(object)	Priority color map. It is built from the priorities in the ERP key mapping when the configuration is seeded, so it is empty in the seed. Do not edit it by hand.
<code>tenantLevel</code>	Boolean	false	Applies the setting at tenant level.

Sample configuration

```
"config" {  
  "erpSupported": false,  
  "priorityColorMap": {},  
  "tenantLevel": false  
}  
"type": "riskMatrixConfig"
```

Notes

- Issue, Work Order, and operation colors come from ERP master data. The `entityColorConfig` document is an empty placeholder and has nothing to configure.

Related settings

- [Create a Risk Matrix \(on page 166\)](#)
- [Configure Innovapptive Key Mapping \(on page 57\)](#)

6. Manage Localization

Add languages, translate product interface strings, and publish the translations for web and mobile users.

Localization covers language translations for all Innovapptive products, both web and mobile. Use it to align UI terms with local business terminology or to translate content into regional languages.

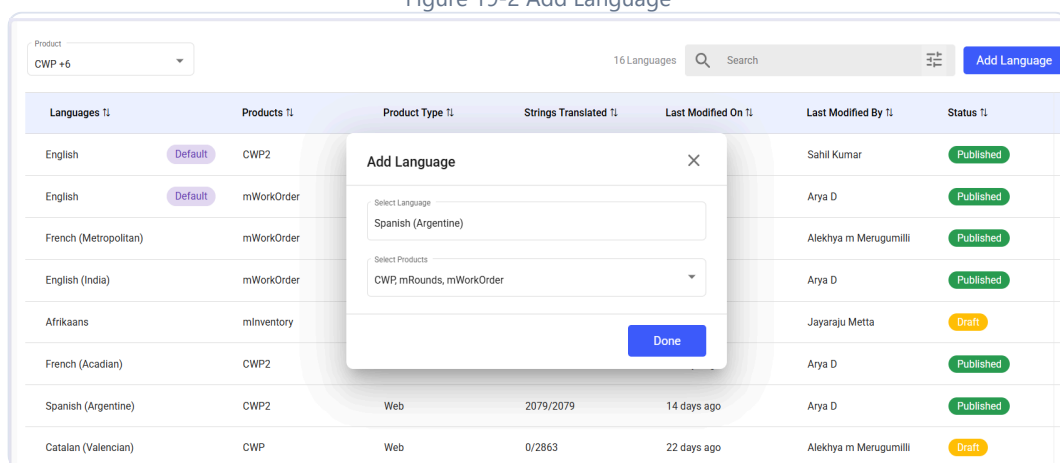
To add a new language:

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

Figure 19-1 Localization Screen

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

Figure 19-2 Add Language



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

4. Click **Done**.

The newly created language is displayed in the list.

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

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

6. Translate all the strings for the selected language.

Figure 19-3 Translate Strings

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

2079/2079 Strings Translated 100% ☐ Show Empty Strings

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

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



Note:

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

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

In the Localization screen, you can also,

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

VI. Configure Platform Services and Reporting

Set mobile preferences, communication and AI options, and build dashboards and reports.

Chapters

- [Customize Platform Settings \(on page 176\)](#)
- [Configure Chat and Notifications \(on page 181\)](#)
- [Configure AI Features \(on page 185\)](#)
- [Build Dashboards and Reports \(on page 189\)](#)

1. Customize Platform Settings

Set mobile storage controls, synchronization preferences, and appearance options for iMaintenance.

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

Related tasks

- [Manage Storage & Sync Settings \(on page 176\)](#)
- [Apply Theme Configurations \(on page 180\)](#)
- [Define Mobile Data Sync Preferences \(on page 177\)](#)

1.1. Manage Storage & Sync Settings

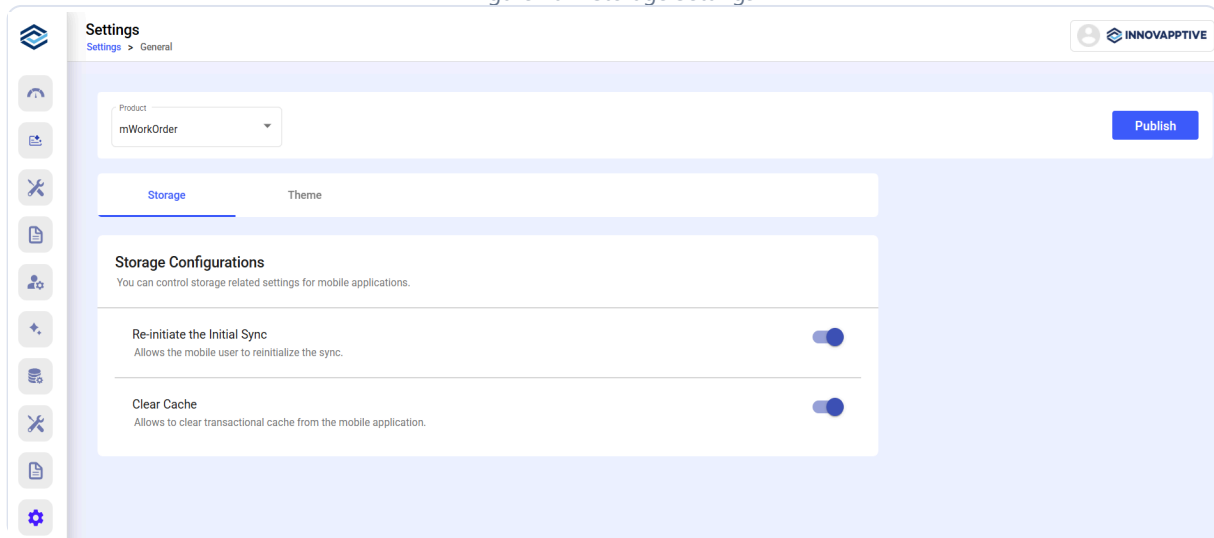
Choose whether mobile users can clear cached data or start a full synchronization.

The Storage tab under General Settings controls how the mobile app handles data, including cache management and full sync initiation.

To manage storage and sync settings:

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

Figure 20-1 Storage Settings



It has two primary options:

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

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

1.2. Define Mobile Data Sync Preferences

Set the fields, filters, and data ranges synchronized to mobile devices for different plants and roles.

Use these preferences to reduce sync times and improve app performance. Preferences can be set at tenant, plant, and role levels.

To define mobile data sync preferences:

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

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

The screen appears with two tabs:

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

In this screen, you can,

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

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

Figure 20-2 Global Data

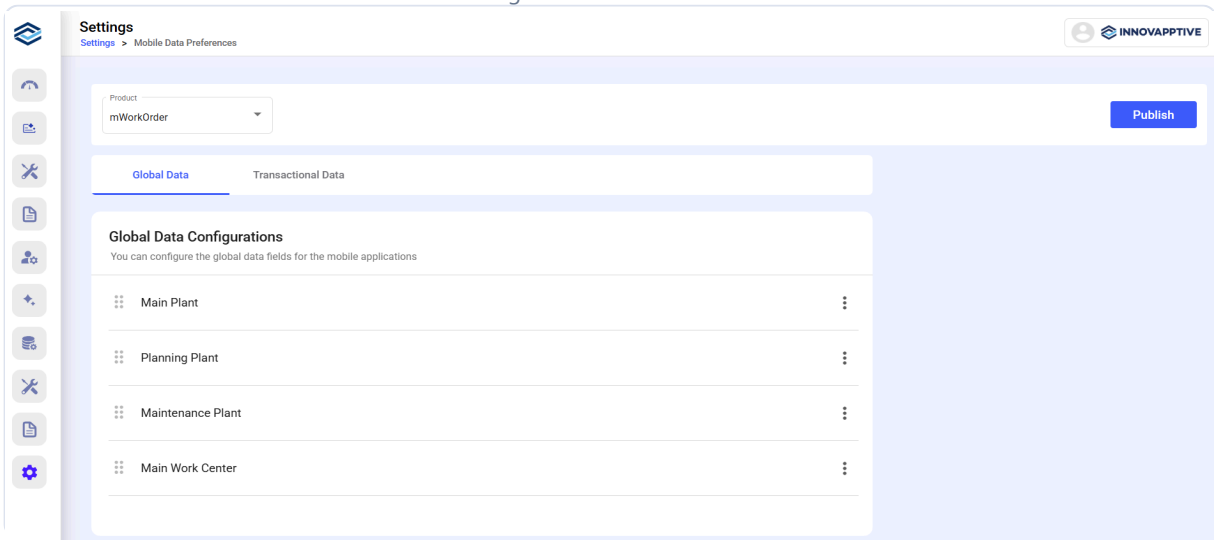
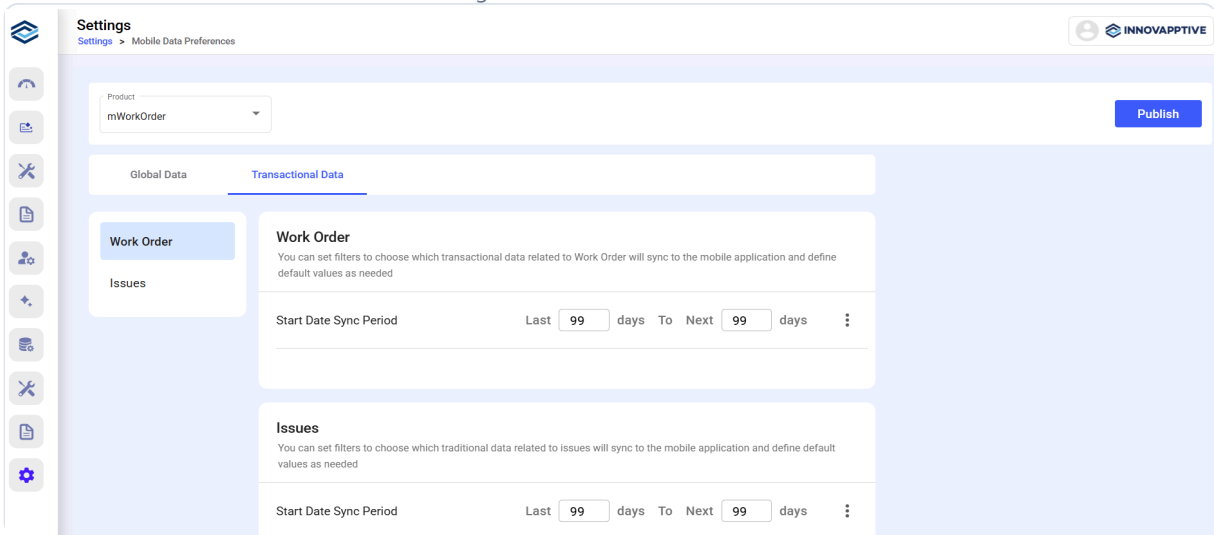


Figure 20-3 Transactional Data



1.3. Apply Theme Configurations

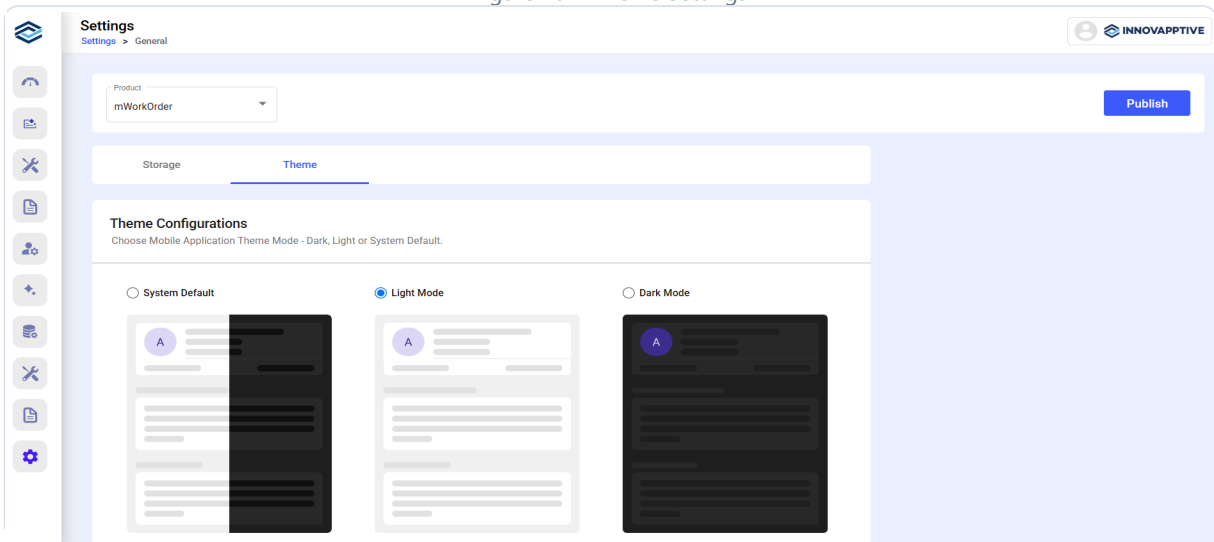
Publish a light, dark, or device-based theme for the iMaintenance mobile app.

Use predefined themes to match user environments or company branding.

To apply theme configurations:

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

Figure 20-4 Theme Settings



You can choose from the following mobile theme modes:

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

Theme preferences apply globally for that product once published.

2. Configure Chat and Notifications

Manage chat and mention alerts for Issues and Work Orders, enable sync-failure alerts, and review how email notifications work.

- [Configure Chat Controls \(on page 181\)](#)
- [Configure Sync-Failure Push Notifications \(on page 182\)](#)
- [System-Generated Notifications \(on page 183\)](#)

2.1. Configure Chat Controls

Turn chat on or off for Issues and Work Orders, and choose whether users are notified of every message or only when they are mentioned.

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

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

Table 21-1 Default Settings

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

Sample Configuration

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

**Note:**

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

Chat configuration in the seed

The chat configuration in the supplied general (tenant) seed contains only the **chat** flag and the mention notification flag:

```
{
  "config": {
    "chat": true,
    "pushNotifications": {
      "mention": true
    }
  },
  "type": "chatConfig"
}
```

2.2. Configure Sync-Failure Push Notifications

The push notification setting turns push notifications for synchronization failures on or off.

Where it is configured

This setting is stored in the database as a configuration document of type `pushNotificationConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>syncFailures</code>	Boolean	true	Sends a push notification when synchronization fails.

Sample configuration

```
"config" {  
  "syncFailures": true  
}  
"type": "pushNotificationConfig"
```

Notes

- This setting covers synchronization failures only. Chat and mention notifications are set in [Configure Chat Controls](#) (on page 181).

Related settings

- [Configure Chat Controls](#) (on page 181)
- [Define Mobile Data Sync Preferences](#) (on page 177)

2.3. System-Generated Notifications

System-generated notifications inform users about workflow events on the web and in the iMaintenance mobile app.

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

2.3.1. Understand the Notification System

System-generated email notifications are defined by their recipients, timing, content, and event type.

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

Key components:

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

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

3. Configure AI Features

The AI configuration controls which AI features are available at tenant and plant level: AI Assist, AI-assisted Issue and Work Order creation, and the location settings for AI Detect and AI Plan.

- Tenant- and plant-level control over AI feature availability.
- AI features covered by this configuration:
 - AI Assist: technician assistance during task execution.
 - AI Issue and AI Work Order: AI-assisted creation of Issues and Work Orders.
 - AI Plan: smart planning and scheduling recommendations.
 - AI Detect: fault detection and predictive diagnostics.

The configuration type is `aiConfig`. It exists in both the general (tenant) configuration and the plant-specific configuration, with the same seed values.

Table 22-1 Fields

Field	Type	Seed value	Description
<code>tenantLevel</code>	Boolean	true	Applies the AI settings across all plants.
<code>plantLevel</code>	Boolean	true	Allows plant-level AI settings.
<code>aiAssist</code>	Boolean	true	Turns AI Assist on or off.
<code>aiIssue</code>	Boolean	true	Turns AI-assisted Issue creation on or off.
<code>aiWorkOrder</code>	Boolean	true	Turns AI-assisted Work Order creation on or off.
<code>aiDetect</code>	Object		Location settings for AI Detect.
<code>aiDetect.geoLocation</code>	Boolean	false	Turns location-based AI Detect on or off.
<code>aiDetect.radius</code>	Number	3	Search radius for location-based AI Detect.
<code>aiPlan</code>	Object		Location settings for AI Plan.
<code>aiPlan.geoLocation</code>	Boolean	false	Turns location-based AI Plan on or off.
<code>aiPlan.radius</code>	Number	3	Search radius for location-based AI Plan.

Sample Configuration

```
"type": "aiConfig",
"config": {
  "aiAssist": true,
  "aiDetect": {
    "geoLocation": false,
    "radius": 3
  },
  "aiIssue": true,
  "aiPlan": {
    "geoLocation": false,
    "radius": 3
  },
  "aiWorkOrder": true,
  "plantLevel": true,
  "tenantLevel": true
}
```



Note:

- AI configurations are stored in the database and can be set per tenant or plant.
- If tenantLevel is set to false, plant-level overrides must be defined with associated plant IDs.
- AI Assist, AI Issue, and AI Work Order can each be turned on or off, based on usage needs and licensing. AI Detect and AI Plan are set through their location settings.
- Keep settings consistent across modules and levels to avoid unexpected differences in AI feature availability.

To set the AI Detect confidence threshold, see [Configure the AI Detect Confidence Threshold \(on page 186\)](#). For AI service endpoints, see [Configure AI Service Endpoints \(on page 187\)](#).

3.1. Configure the AI Detect Confidence Threshold

Set the confidence threshold used by AI Detect planning.

Where it is configured

This setting is stored in the database as a configuration document of type `aiDetectPlanConfig`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>threshold</code>	Number	0.1	Confidence threshold for AI Detect planning.

Sample configuration

```
"config" {  
  "threshold": 0.1  
},  
"type": "aiDetectPlanConfig"
```

Related settings

- [Configure AI Features \(on page 185\)](#)

3.2. Configure AI Service Endpoints

These settings hold the service endpoints used by AI features and cloud upload, and the AI server used by each tenant.

Where it is configured

The endpoints are stored as configuration type `baseURLConfig` in the general (tenant) configuration. The values are specific to each environment and are not part of the out-of-the-box export. The samples below use placeholder addresses. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>aiAssist</code>	String	environment-specific	Endpoint for AI Assist.
<code>aiIssue</code>	String	environment-specific	Endpoint for AI-assisted Issue creation.
<code>aiWorkInstruction</code>	String	environment-specific	Endpoint for AI work instruction services.
<code>aiWorkOrder</code>	String	environment-specific	Endpoint for AI-assisted Work Order creation.
<code>cloudUpload</code>	String	environment-specific	Endpoint for cloud upload.

Sample configuration (placeholder addresses)

```
"config" {  
  "aiAssist"  "https://aiassist.example.com/"  
  "aiIssue"   "https://aiissue.example.com/"  
  "aiWorkInstruction" "https://aiworkinstruction.example.com/"  
  "aiWorkOrder" "https://aiworkorder.example.com/"  
  "cloudUpload" "https://cloudupload.example.com/"  
}  
"type"  "baseUrlConfig"
```

AI server per tenant

Stored as configuration type `aiServerConfig` in the general (tenant) configuration.

Field	Type	Seed value	Description
<code>tenants[].ai_server_base_url</code>	String	environment-specific	Base URL of the AI server for the tenant.
<code>tenants[].domain</code>	String	environment-specific	Domain of the tenant.
<code>tenants[].tenant_key</code>	String	environment-specific	Tenant key.

```
"config" {  
  "tenants" [  
    {  
      "ai_server_base_url" "https://ai.example.com"  
      "domain"  "your-tenant.example.com"  
      "tenant_key"  "YOURTENANT"  
    }  
  ]  
}  
"type"  "aiServerConfig"
```

Related settings

- [Configure AI Features \(on page 185\)](#)

4. Build Dashboards and Reports

Create dashboards, configure widgets, build reports, and manage archived reporting items.

Dashboards and reports let supervisors and technicians visualize, track, and analyze operational data such as asset health, Work Order status, and performance metrics in real time.

Related tasks

- [View the Asset360 Dashboard \(on page 189\)](#)
- [Create Dashboards \(on page 190\)](#)
- [Add and Configure Widgets \(on page 191\)](#)
- [Create Custom Reports \(on page 193\)](#)
- [Manage Archived Dashboards, Reports, and Widgets \(on page 195\)](#)
- [Configure the Asset360 No Priority Entry \(on page 196\)](#)

4.1. View the Asset360 Dashboard

Review maintenance costs, equipment downtime, Work Order and Issue status, and performance metrics for your assigned plants.

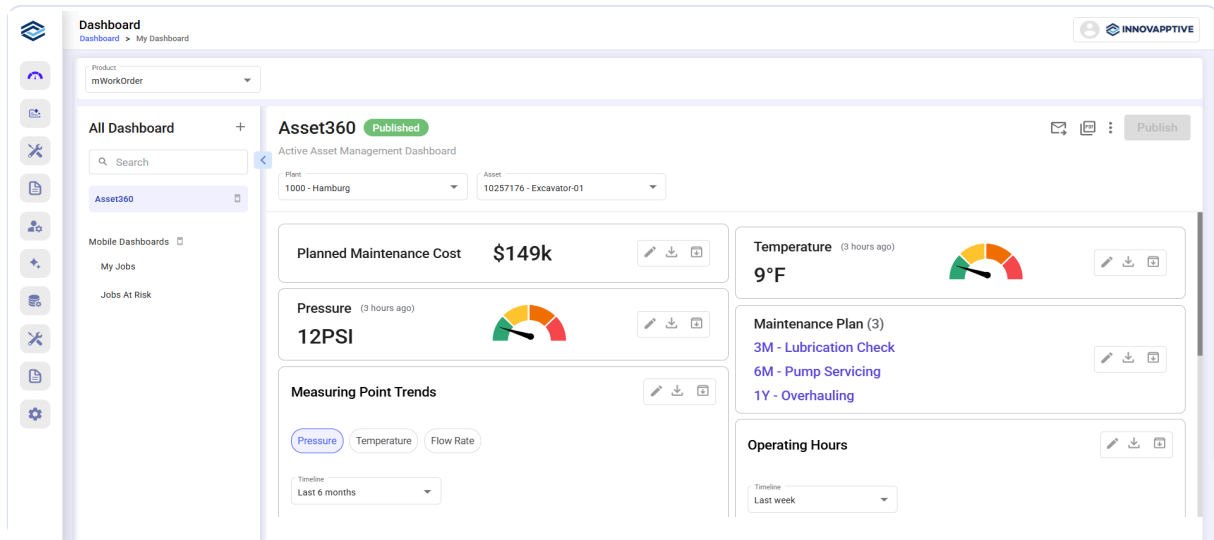
The dashboard gives a real-time view of work center and asset performance, maintenance costs, resource use, Work Order and Issue status, workforce efficiency, and historical data.

Supervisors use it to track KPIs for their work centers and find equipment or technicians that are under-performing. Select plants and assets to review their metrics.

Key actions available:

- **Selecting Plants and Assets** to track their performance.
- **Viewing key metrics** such as:
 - Actual Maintenance Cost
 - Planned Maintenance Cost
 - Equipment Downtime
 - Work orders with System Status, User Status, and Priority
 - Issues with System Status, User Status, and Priority
 - Mean Time To Repair
- **Customizing widgets** and publishing updates.
- **Downloading widget data** for offline use.
- **Archiving widgets** that are no longer needed.

- **Sharing dashboards via email** using the Mail icon.
- **Exporting dashboards** as PDFs.
- **Searching dashboards** using the search bar.

**Note:**

You can change only the title and color of Asset360 widgets. Click **Publish** at the top right to apply the changes. Published changes also appear in the iMaintenance mobile app.

To control whether the priority filters show a **No Priority** entry, see [Configure the Asset360 No Priority Entry \(on page 196\)](#).

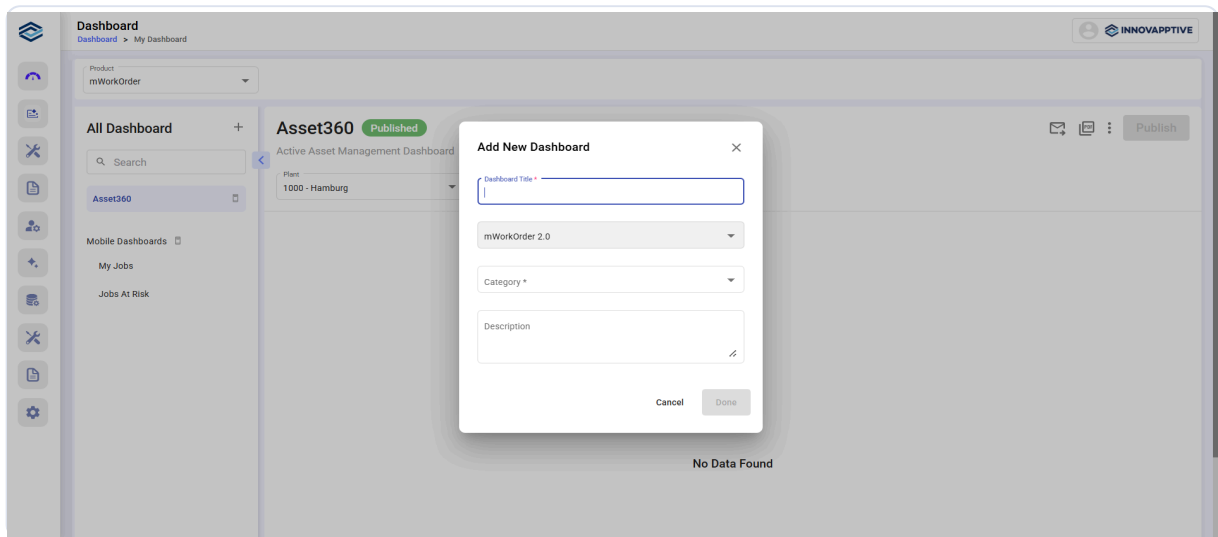
4.2. Create Dashboards

Create a dashboard with a product, category, title, and description, then add the widgets you need.

Custom dashboards give different user personas visibility into the data most relevant to them.

To create a dashboard:

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



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

You can now begin adding widgets to the dashboard.

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

4.3. Add and Configure Widgets

Add a pre-built or custom widget and choose its data, filters, and display options.

Widgets show operational data on your dashboard as charts, tables, or KPIs.

To add a widget:

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

If using Pre-built Widgets:

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

If building your own widget:

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

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

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

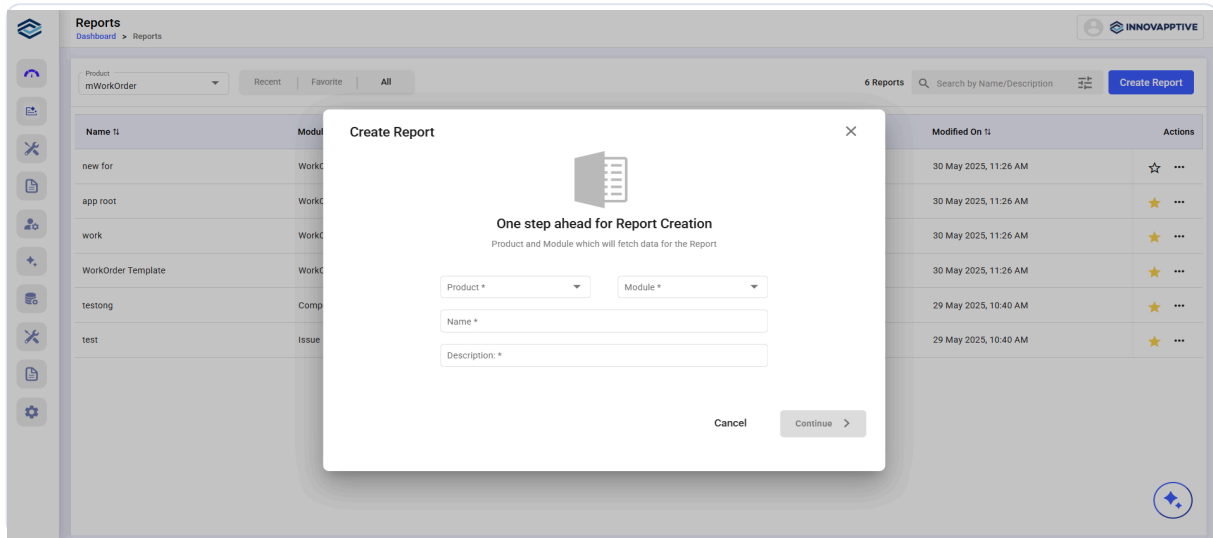
4.4. Create Custom Reports

Create a report from maintenance records, choose its columns and grouping, and filter or download the results.

Reports use business objects such as Work Orders, Components, Operations, and Issues.

To create a report:

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



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

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

The screenshot displays the 'Reports' configuration interface. On the left, a sidebar contains navigation icons. The main area is titled 'Reports' and includes a search bar with '41k Records'. Below the search bar is a table with the following columns: Priority, ERP WorkOrder Id, Description, Plant Id, Maintenance Plant Id, and Name. The table contains several rows of data, including 'Pump Malfunction Issue', 'No Wo Comp Check', 'Oil Leakage Detection', 'Pump Issue Reported', and 'Pipe Breakage - Delta'. On the left side of the table, there is a 'Filter' panel with 'OUTLINE' and 'FILTER' tabs. Under 'Filter', there is a 'Group By Fields' section with 'Add Group' and 'Priority' selected. Below that is a 'Columns' section with 'Select Columns' and a list of selected fields: Priority, ERP WorkOrder Id, Description, Plant Id, Maintenance Plant Id, Name, and WorkOrder Status.

You can also,

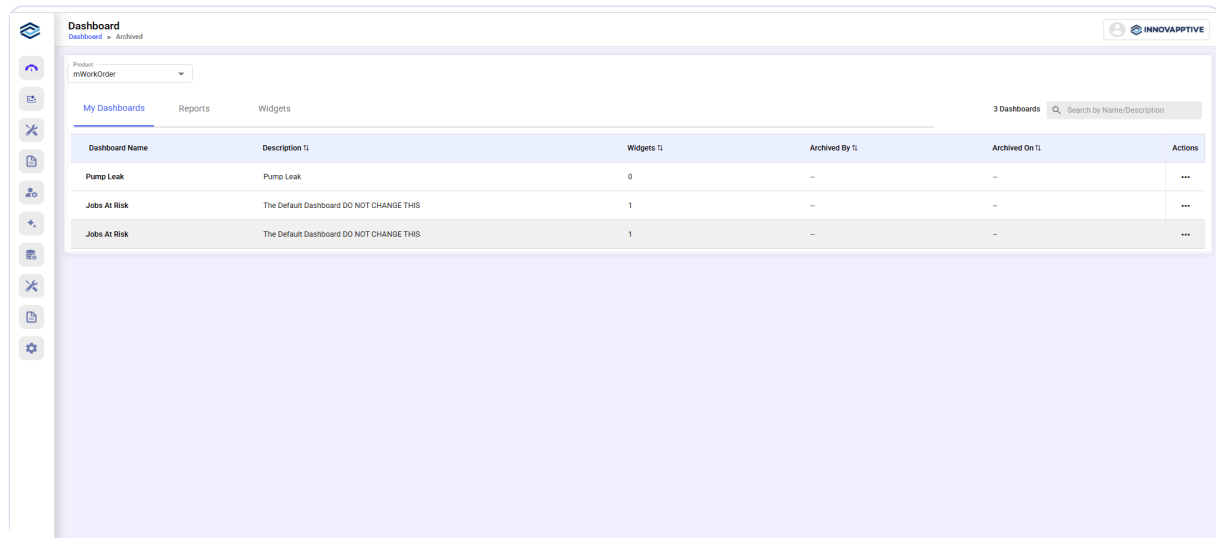
- Mark as Favorite.
- Search the columns.
- Filter by Date, Plant, Shift, Location, Equipment ID, etc.
- Use operators like *equals*, *contains*, *greater than*, etc.
- Download reports in CSV or Excel format.
- Use **Undo**, **Redo**, **Sort**, or **More** to hide/move/stick/group columns.

4.5. Manage Archived Dashboards, Reports, and Widgets

Find archived dashboards, reports, and widgets, then restore or delete the items you select.

Archiving dashboards, widgets, and reports clears them from your workspace without losing their data.

To manage archived items:

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

2. Use the tabs to view:

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

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

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

4.6. Configure the Asset360 No Priority Entry

This setting controls whether the Asset360 priority filters and legend show a No Priority entry.

Where it is configured

This setting is stored in the database as a configuration document of type `asset360Config`. The values below are from the general (tenant) configuration in the supplied configuration seed. Your IT or implementation team applies changes.

Fields

Field	Type	Seed value	Description
<code>displayUnknownPriority</code>	Boolean	true	Shows a No Priority entry in Asset360 priority filters. The entry is added by the dashboard; it does not change the priority of any record.

Sample configuration

```
"config" {  
  "displayUnknownPriority": true  
}  
"type"  "asset360Config"
```

Related settings

- [View the Asset360 Dashboard \(on page 189\)](#)