

iMaintenance User Guide for Technicians

Connected Worker Solutions



Title and Copyright

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

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

Release Version: 2609

Release Date: 19 Oct 2026

Published Date: 19 Oct 2026

Document Version: 1.0

Copyright © 2012-2026, Innovapptive Inc. and/or its affiliates. All rights reserved.

Primary Author: Innovapptive Inc.

Copyright Notices: Neither our Application nor any content may be copied without inclusion of all copyright notices and/or disclaimers provided therein. Any third party provider logos or marks provided through the Application shall remain owned by such third party provider as may be indicated in a notice contained in the Application or content and you shall not modify or remove any such notice. Neither we nor our suppliers or any third party providers grant any rights or license to any logos, marks, or copyrighted material other than as expressly set forth herein.

PDF technology powered by PDFTron Mobile SDK copyright © PDFTron™ Systems Inc., 2001-2019, and distributed by Innovapptive Inc under license. All rights reserved.

Preface

Find out who this guide is written for, what the text styles in it mean, and how to contact Innovapptive about the product or the documentation.

Intended Audience

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

Document Conventions

Table 0-1 Conventions followed in the document

Convention	Meaning
boldface	Indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<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](#)

Contact Innovapptive

For information on Innovapptive products, visit the Innovapptive's Support Portal at <https://helpdesk.innovapptive.com>. The updates to this document are published on this support portal. Check this website periodically for updated documentation.

For additional information about this document, send an email to documentation@innovapptive.com.

What Your Administrator Controls

Several things you see in iMaintenance are set by your administrator, not by you. If a screen, field, or action described in this guide is missing, the behavior may be controlled by one of these settings.

Your administrator configures iMaintenance in the iCWP configuration platform. Settings apply at tenant level, plant level, or both, so two plants in the same organization can behave differently.

Table 0-2 Settings that change what you see

Setting	What it changes for you
Core module enablement	Whether the Issue, Work Order, and Timesheet modules are visible and usable at all. Set separately for the tenant and for each plant.
Work order settings	How operations are confirmed, whether you can raise a follow-up issue, whether you can raise an issue when submitting a form, whether RCA details are captured, and whether measuring point features are available.
User experience controls	Which columns and fields appear in the Work Order, Equipment, Functional Location, and Issue list views, and how attachments behave.
Field configuration templates (RACE)	Which pages, sections, and fields you see when you report an issue or carry out an inspection. A template must be published before it takes effect.
AI configuration	Whether AI-assisted capabilities appear. AI agents are enabled or disabled individually, at tenant and plant level.
Form auto-assignment	Whether forms are already attached to the work order you open, and on what criteria — equipment, functional location, task list, maintenance plan, or work order type.
Mobile data sync preferences	Which global and transactional data reaches your device, set at tenant, plant, and role level. This determines what you can work on offline.
Storage and sync settings	How the app handles cached data and when a full sync is triggered.
Delay reasons	The reasons and sub-reasons you choose from when you report a blocker on an operation, and the group responsible for clearing each one. They are set for each plant. If a reason you need is not listed, ask your administrator.
Wrench loss display and editing	Where blocked time appears: a Wrench Loss tab while you execute a work order, a wrench loss section in operation confirmation and the timesheet, and a wrench losses section on the Technical Completion (TECO) screen. A separate setting decides whether you can adjust blocker durations by changing the start or end time in operation confirmation. If it is off, durations are read-only. Each setting is turned on separately for each plant and all are off by default, so a plant that hasn't enabled them won't show these sections.

Table 0-2 Settings that change what you see (continued)

Setting	What it changes for you
User roles and groups	Which actions you are permitted to take, and which plants and work centers your work orders come from.

Settings you can change yourself — theme, language, and profile — are covered in [Switch between Dark and Light Modes \(on page 91\)](#), [Choose Language \(on page 93\)](#), and [View User Profile \(on page 94\)](#).

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

Contents

Title and Copyright.....	ii
Preface.....	iii
What Your Administrator Controls.....	iv
1. Introduction to iMaintenance.....	8
1.1. What's New for Technicians in iMaintenance.....	9
1.2. System Requirements.....	12
2. Get Started.....	14
2.1. Log in to the iMaintenance Application.....	14
2.2. iMaintenance Dashboard and Main Screens.....	18
2.2.1. Home (Dashboard).....	22
2.3. Buttons and Icons in Application.....	25
3. Start Your Shift.....	28
3.1. Set What Synchronizes with Smart Sync.....	28
3.2. View Push Notifications.....	30
3.3. Alert Supervisors to Blocked Work.....	31
3.4. Search and Filter Records.....	31
3.5. Work Offline and Synchronize Data.....	34
3.6. Recover from a Failed Synchronization.....	35
4. Report and Manage Issues.....	36
4.1. Create an Issue.....	36
4.2. Create an Issue from Existing One.....	43
4.3. Delink Work Order from Follow-up Issue.....	45
4.4. Add Work Logs to a Service Request.....	45
5. Execute a Work Order.....	47
5.1. Operation Status, Confirmation, and Timesheets.....	49
5.2. Before Work Starts — When Shown.....	49
5.2.1. Acknowledge the Permit for Your Job.....	49
5.2.2. Review the Linked JHA.....	50
5.2.3. Read the Work Instruction Before You Start.....	51
5.2.4. Review the Job Plan.....	53
5.2.5. Collect Components.....	53
5.3. Start an Operation or Sub-operation.....	54
5.4. During Execution — When Shown.....	56
5.4.1. Capture Asset Data using Forms.....	56

5.5. As Needed During Execution.....	58
5.5.1. Pause an Operation.....	58
5.5.2. Resume an Operation.....	59
5.5.3. Reporting and Clearing Blockers (Wrench Time Loss).....	59
5.5.4. Put Work on Hold.....	62
5.5.5. Confirm Multiple Operations at Once.....	63
5.5.6. Add Attachments.....	64
5.5.7. Report a Follow-up Issue.....	66
5.5.8. Create a Follow-Up Work Order.....	67
5.5.9. View Related Work.....	68
5.5.10. View Follow-up Issues Linked to a Work Order.....	68
5.5.11. Create an Emergency Work Order.....	69
5.5.12. Report a Problem with a Work Instruction.....	71
5.6. End and Confirm an Operation.....	71
5.7. Surrender the Permit.....	75
5.8. Submit a Timesheet.....	75
5.9. Correct and Resubmit a Rejected Timesheet.....	76
5.10. Complete a Work Order.....	77
6. Look Up Equipment and Locations.....	81
6.1. View Equipment Details.....	81
6.1.1. Create a Measuring Point.....	83
6.2. View Functional Location Details.....	86
7. Troubleshoot Common Problems.....	89
8. Settings, Help, and Profile.....	91
8.1. Switch between Dark and Light Modes.....	91
8.2. Choose Language.....	93
8.3. View User Profile.....	94
8.3.1. View Log History.....	95
8.4. Access Help Center.....	98

1. Introduction to iMaintenance

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

iMaintenance is a mobile application you use on a phone or tablet to view, execute, and complete the maintenance work orders assigned to you.

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

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

Key Features

Efficient Work Order Management

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

Intelligent Issue Reporting

- Users can report equipment conditions promptly so they can be assessed and followed up.
- AI-powered analysis suggests relevant equipment and functional location based on historical data, keywords, and images.
- The issue is routed for review so it can be assessed and actioned.

AI-Powered Assistance (SIA)

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

Offline Functionality and Synchronization

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

Timesheet Tracking and Approval

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

iMaintenance Benefits for Technicians

iMaintenance helps technicians find assigned work, review job requirements, record execution, and report additional problems from the field. To do this, iMaintenance provides essential tools to manage their daily tasks efficiently:

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

1.1. What's New for Technicians in iMaintenance

Following are the new features and enhancements for iMaintenance introduced for technicians.

Check the releases below for the information:

- [New Features and Enhancements in Release 2609 \(on page 9\)](#)
- [New Features and Enhancements in Release 2608.01 \(on page 11\)](#)

New Features and Enhancements in Release 2609

Schedule and Assign Work in Maintenance Control Center

View their assigned Work Order tasks based on the Scheduled Start date in Maintenance Control Center, providing a clear view of their daily work list.

For more information, see [Execute a Work Order \(on page 47\)](#).

Alert Supervisors to Blocked Work

Receive push notifications when blockers are cleared and can track blocker updates through work order chat. Chat messages notify participants, and all notifications remain available in Alerts.

For more information, see [Alert Supervisors to Blocked Work \(on page 31\)](#).

View and Filter Work Orders and Service Requests using Site-Configured Status Names

View and filter Work Orders and Service Requests using site-configured status names. For Work Orders with multiple technician assignments, the overall status reflects individual assignment progress.

For more information, see [Search and Filter Records \(on page 31\)](#).

Offline Capability and Cached Asset Access

Access previously cached asset or location history and upload, retrieve, and view attachments while offline.

For more information, see [Add Attachments \(on page 64\)](#).

Capture Work Logs on Service Requests

Add and view Work Logs on Service Requests from Mobile. Logs sync to Maximo and remain available when the Service Request is reopened.

For more information, see [Add Work Logs to a Service Request \(on page 45\)](#).

Work With Tasks on the Work Order

View and add Work Order Tasks, edit existing tasks, and access task details, including assignments, labor, and materials. The Activities and Tasks section displays tasks and activities with a count, while the Operations tab lists only actionable activities.

For more information, see [Execute a Work Order \(on page 47\)](#).

View Job Plans on the Work Order

View Job Plan task steps and planned labor, tools, and materials within the Work Order, keeping execution aligned with the planned requirements.

For more information, see [Review the Job Plan \(on page 53\)](#).

Check Parts Availability from the Work Order

Search for parts within a Work Order and check on-hand availability and Asset BOM information to identify the right spare parts.

For more information, see [Collect Components \(on page 53\)](#).

Load the Right Inspection Form from the Job Plan

Receive the inspection form mapped to the Job Plan for PM or calibration Work Orders, or to the asset or Work Order type for corrective work. In-progress jobs retain the form version they started with.

For more information, see [Capture Asset Data using Forms \(on page 56\)](#).

Report and Clear Blockers on Operations

Report and clear operation blockers, track lost time, and resume work online or offline. Before confirming an operation, they can review wrench time losses and add missed entries or correct recorded start and end times.

For more information, see [Reporting and Clearing Blockers \(Wrench Time Loss\) \(on page 59\)](#).

Record Hold Status and Delay Reasons

Set Work Orders, Activities, or Tasks to configured hold or delay statuses, record reasons, and retry unsuccessful submissions without losing their selections. Status changes made offline sync when connectivity returns.

For more information, see [Put Work on Hold \(on page 62\)](#).

Create Linked Follow-Up Work Orders

Create linked follow-up Work Orders for newly identified work. When offline creation is configured, requests sync upon re-connection without creating duplicates, while the original Work Order remains unchanged.

For more information, see [Create a Follow-Up Work Order \(on page 67\)](#).

View Related Records and History

View related Service Requests, Work Orders, and previous work for the same asset or location directly from the current record.

For more information, see [View Related Work \(on page 68\)](#).

View an Asset's Activity in Asset 360

view an asset's recent Work Orders, issues, and history in Asset 360, filter records by status and type, and open Work Orders directly from the dashboard.

For more information, see [View Equipment Details \(on page 81\)](#).

New Features and Enhancements in Release 2608.01

Table 1-1 New Features and Enhancements in Release 2608.01

See Who Put an Operation on Hold

View the technician's name and reason for putting an Operation on hold directly in the Work Order timeline.

For more information, see [Pause an Operation \(on page 58\)](#).

Table 1-1 New Features and Enhancements in Release 2608.01 (continued)

Automatically Attach Submitted Forms as PDFs

Automatically generate a PDF when a Form is submitted and attach it to the Work Order. You can also convert submitted Forms to PDF later, including when working offline.

For more information, see [Capture Asset Data using Forms \(on page 56\)](#).

This page covers release 2608.01 only. To see everything iMaintenance has added, release by release, visit the [iMaintenance Feature History](#).

1.2. System Requirements

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

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

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

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

**Note:**

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

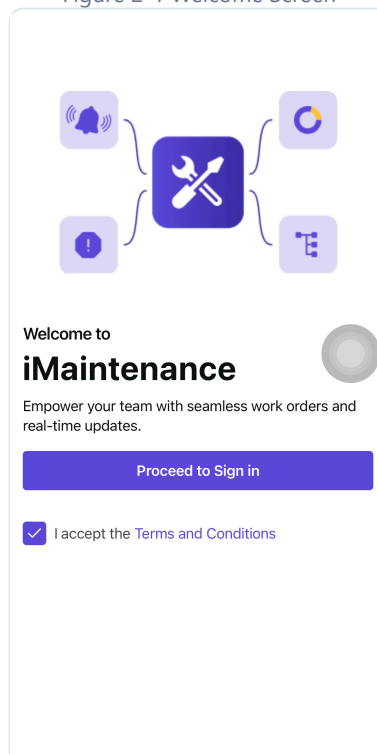
2. Get Started

2.1. Log in to the iMaintenance Application

Log in to iMaintenance by entering your company domain, Email ID, and password; on first use, you also create a device passcode and can enable biometric access when it is available on the device.

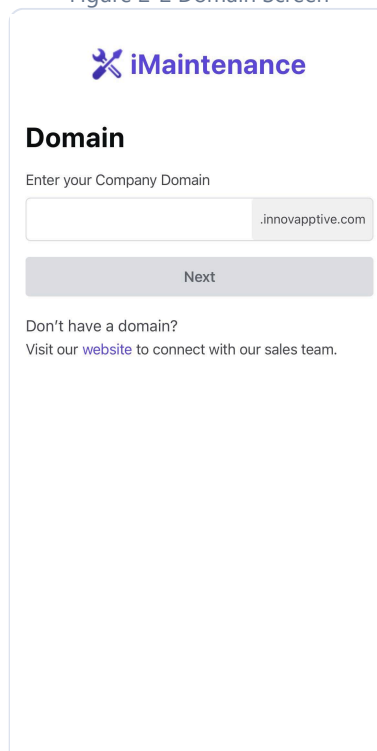
1. Open the application.
2. In the Welcome screen, accept **Terms and Conditions** and tap **Proceed to Sign in**.

Figure 2-1 Welcome Screen



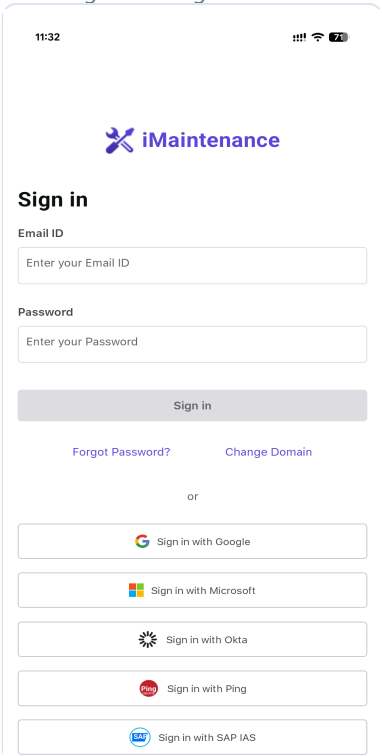
3. In the **Domain** screen, enter the company domain and tap **Next**.

Figure 2-2 Domain Screen



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

Figure 2-3 Sign In Screen

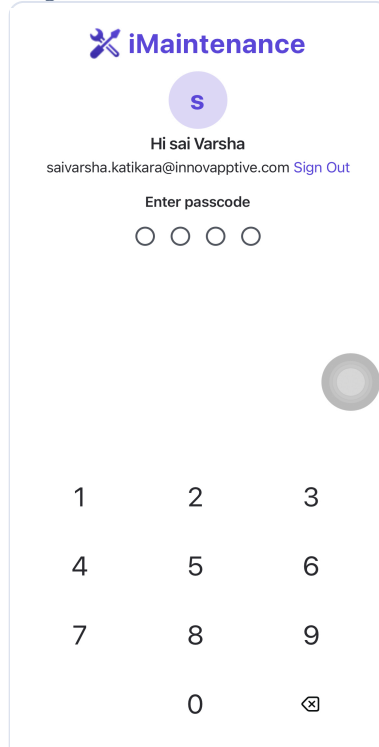


Create Passcode

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

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

Figure 2-4 Create Passcode Screen

**Note:**

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

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

Enable Biometric Access

Enable biometric access to log in to iMaintenance using your device's fingerprint or face recognition, when it is available on the device.

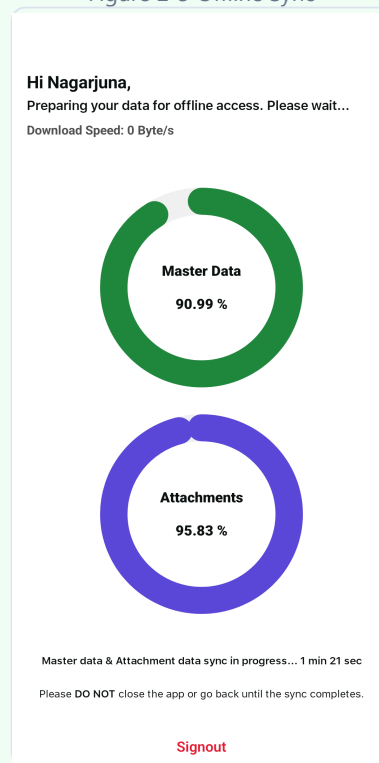
8. **Optional:** In the Set Up Biometric Authentication screen, tap **Enable Biometrics**.
9. **Optional:** If your device supports fingerprint recognition, provide your fingerprint to enable fingerprint login.
10. **Optional:** If your device supports face recognition, scan your face to enable face login.

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

Result

You are signed in and the application starts the configured synchronization process. The application then syncs master data and attachments for offline access and displays the Home screen.

Figure 2-5 Offline Sync



Note:

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

2.2. iMaintenance Dashboard and Main Screens

Use the Dashboard and main screens to find assigned work, reported issues, alerts, and supporting tools.

The application consists of the Home (Dashboard), Work Orders, Issues, Alerts, and More screens. For the Home screen, see [Home \(Dashboard\)](#) (on page 22).

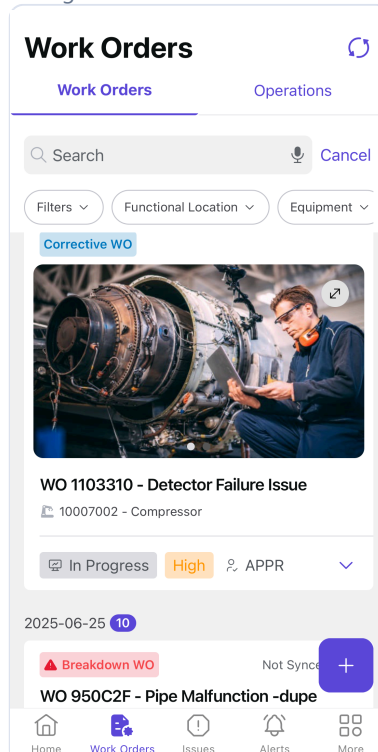
Work Orders

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

Work Orders tab

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

Figure 2-6 Work Orders Screen



On this screen, you can:

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

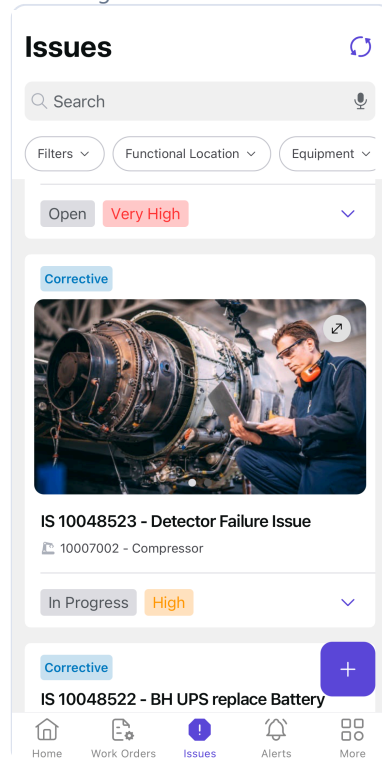
Operations tab

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

Issues

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

Figure 2-7 Issues Screen



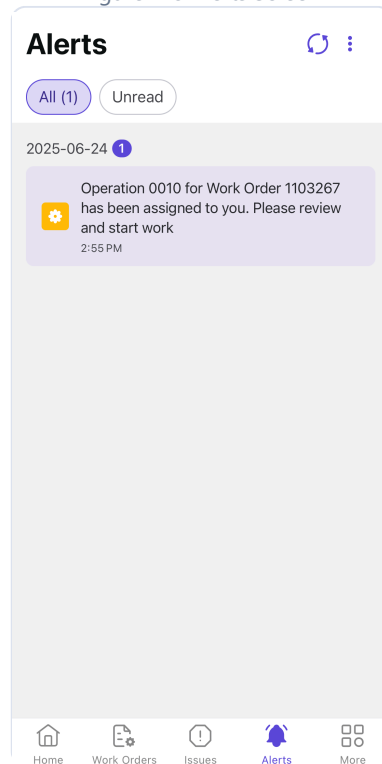
On this screen, you can:

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

Alerts

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

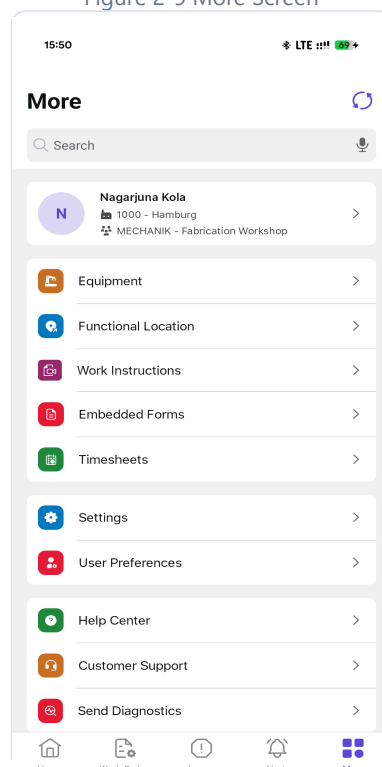
Figure 2-8 Alerts Screen



More

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

Figure 2-9 More Screen



On this screen, you can:

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

2.2.1. Home (Dashboard)

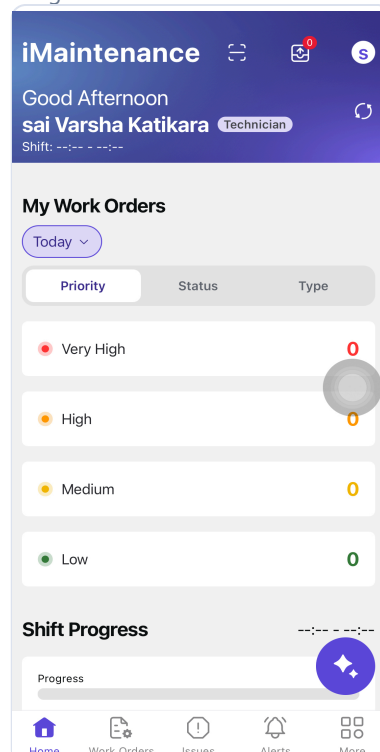
The Home (Dashboard) screen shows your assigned work orders, issues, and alerts in one place, ordered by scheduled start date.

Technician Dashboard

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

The Technician Dashboard is divided into the following key sections:

Figure 2-10 Technician Dashboard



Tip:

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

• Header

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



icon lets you scan the asset from the Dashboard.

- The Outbox



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

- The Profile



icon lets you view the personal profile details.

- The Manual Sync



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

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

• My Work Orders

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

• Issues

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

• Shift Progress

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

• Live Status Overview

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

• My Operations

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



Note:

This section appears only if high-priority tasks are assigned.

• Preventive Maintenance Tasks

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



Note:

This section is shown only when PM tasks are assigned.

• **Issues Reported by Me**

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



Note:

Header filters (Today, Tomorrow, This Week) do not apply here.

• **Quick Actions**

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



Note:

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

2.3. Buttons and Icons in Application

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

Following are the buttons and icons available in the application:

Table 2-1 Buttons and Icons

Button/Icon	Name	Purpose
	Profile	View User Profile.

Table 2-1 Buttons and Icons (continued)

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

Table 2-1 Buttons and Icons (continued)

Button/Icon	Name	Purpose
	Search	Search for records in the modules.
	Chat	Send messages, share files, and tag team members.

3. Start Your Shift

3.1. Set What Synchronizes with Smart Sync

Set the plant and date range used for synchronization before the shift begins.

Before the shift begins, set the synchronization scope, review notifications, find priority work, and confirm the required records are available. Shift preparation follows this flow:

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

Begin by setting the synchronization scope:

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

**Note:**

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

4. Tap **Save**.

Figure 3-1 User Preferences

Result

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

Next action

Next: [View Push Notifications \(on page 30\)](#) to see the work that needs attention.

3.2. View Push Notifications

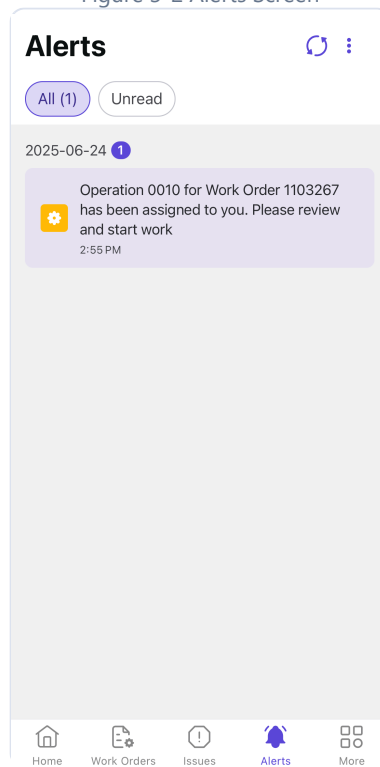
Check the Alerts screen for assigned issues, task status changes, and updates from your team, then mark the alerts as read or clear them.

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

To check notifications:

1. Open the **Alerts** screen.

Figure 3-2 Alerts Screen



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

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

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



Note:

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

Result

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

3.3. Alert Supervisors to Blocked Work

When you block an operation, the mapped supervisor receives a push notification with the Work Order, operation, reporter, time, and reason for the block.

The block details, including the reason, sub-reason, and responsible party, are recorded in the work order chat. You receive a notification when the block is cleared.

Work order chat messages also send push notifications to chat participants.

**Note:**

- If no supervisor of the operation's work center is mapped, your manager receives the notification.
- No push notification is sent when you clear your own blocker or resume a blocked operation. The action is still recorded in the work order chat.
- Blocks closed through confirmation or TECO do not generate push notifications or chat messages.

3.4. Search and Filter Records

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

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

Result

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

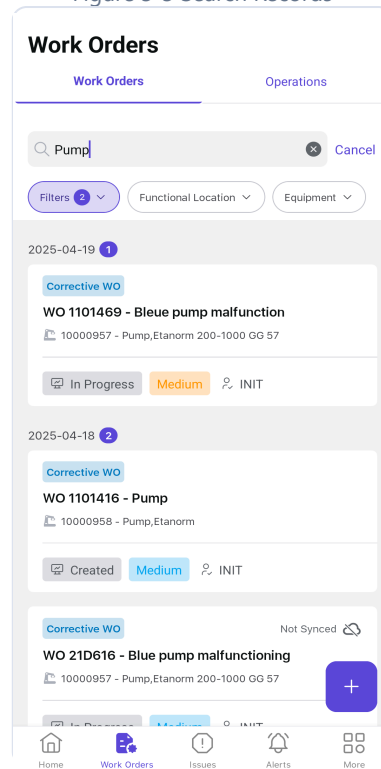
Search Records

To search records:

1. Open the **Work Orders, Operations, or Issues** screen.

2. Enter the keyword in the Search  bar.

Figure 3-3 Search Records



Result

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

Filter Records

To filter records:

1. Open the **Work Orders, Issues, or Alerts** screen.
2. Tap **Filters** below the search bar.
3. In the **Filters** screen,
 - a. In the **Sort By** section, choose **Latest on Top** or **Oldest on Top** radio button.
 - b. In the **Status** section, select the checkboxes for relevant statuses, such as:
 - Open
 - Not Started
 - On-Hold

- Partial Confirm
- In Progress
- Completed

c. In the **Priority** section, select the desired levels:

- Very High
- High
- Medium
- Low

d. In the **More Filters** section,

- Tap on options such as Work Center, Functional Location, or Assigned to and select specific criteria.

4. Tap **Apply Filters** to update the records list with your selected filters.

5. (Optional) To save the selected filters for future use, tap **Save Selection** before exiting.

6. (Optional) To clear all selected filters, tap **Reset**.

Figure 3-4 Filter Records

Cancel Filters Reset

Sort By

☒ Latest on Top

☐ Oldest on Top

Status

☐ Created

☐ Released

☐ In Progress

☐ Completed

☐ Closed

Priority

☐ Extreme Risk

☐ High

☒ Medium

☐ Low

☐ Negligible

Show Only

☐ Breakdown

☐ Assigned to me

Save Selection Apply Filters



Note:

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

Result

The list displays records matching the selected filters.

**Note:**

You can filter Work Orders and Service Requests using the site-configured status names displayed in the system. The same status names are used when viewing and filtering records, making it easier to track work according to your site's status definitions.

- Service Requests have their own status flow, from submission through approval or rejection. Each status change records the user who made the change.
- For Work Orders with multiple technician assignments, the overall Work Order status reflects the progress of the individual technicians.

3.5. Work Offline and Synchronize Data

Before you work without a network connection, synchronize the records you need, then check the Outbox for work still waiting to synchronize and resolve any failures.

Prepare Before Going Offline

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

Work While Offline

Supported changes are stored locally and appear in the Outbox. AI services and other online-only capabilities are unavailable. Mobile-created work orders and execution details sync automatically.

Work Orders creation and execution details sync automatically. You can view asset or location history and upload, retrieve, and view attachments, including previously cached files when offline.

**Warning:**

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

Synchronize Pending Work

Restore connectivity and run **Manual Sync**. To review the Outbox statuses, resolve a record that will not leave the Outbox, and continue your task afterwards, follow [Recover from a Failed Synchronization \(on page 35\)](#).

3.6. Recover from a Failed Synchronization

Work through a record that is still waiting in the Outbox after connectivity returns, using the message the application records against it.

Work through the record in order. The validation or posting message recorded against it is what tells you which part of the record to correct.

1. Restore connectivity.
2. Run **Manual Sync**.
3. Review the records shown as **Pending**, **Syncing**, **Failed**, or **Synchronized**.

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

4. Open a failed record and review the validation or posting message recorded against it.
5. Correct the underlying record and retry synchronization.
6. Escalate unresolved SAP, permission, or server errors.



Warning:

Do not delete the pending local record while unsynchronized work remains. Do not sign out, uninstall the application, or clear application data either — the queued work is stored on the device.

Result

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

Next action

Preparation before going offline, and what the application can and cannot do while offline, are covered in [Work Offline and Synchronize Data \(on page 34\)](#).

Next: Continue the task you were working on.

4. Report and Manage Issues

4.1. Create an Issue

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

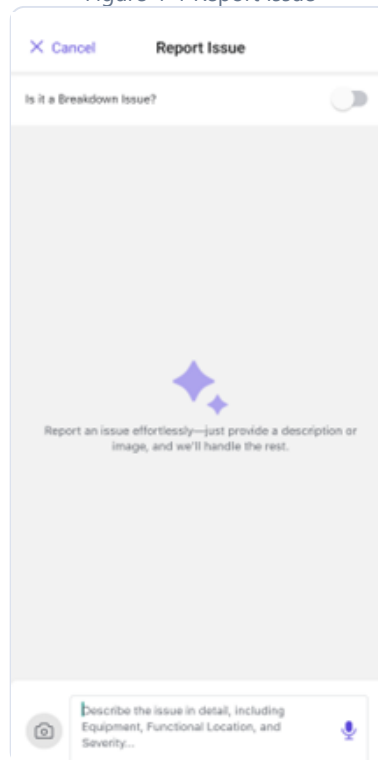
To create an issue:

1. In the **Issue List** screen, tap the Create  icon.

2. In the **Report Issue** screen, to make reporting faster and easier, iMaintenance includes AI-powered suggestions and smart input options. You can choose any of the following options:

- **Capture an Image** using the Camera  icon — the system analyzes the image and suggests issue details **or**,
- **Type** the issue details such as equipment, functional location, and severity directly into the AI text box: enter a prompt describing the issue (e.g., *"oil leak near pump"*), and the app automatically fills in related fields like equipment, functional location, and severity **or**,
- **Use Voice Input** by tapping the Mic  icon and speaking your description — SIA transcribes and interprets the input. The app captures your input, adding context like timestamp and location.

Figure 4-1 Report Issue



Note:

If it is an emergency issue, switch on the **Is it a Breakdown Issue?** toggle at the top.

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

4. Select the **Equipment** and the **Functional Location**, then tap **Next**.



Note:

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

5. Review the issue details that are generated for you.

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

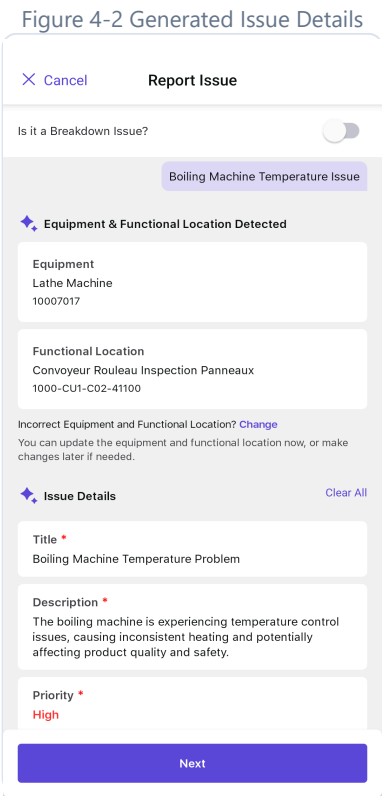


Table 4-1 Issue detail fields

Field	What it holds
Equipment	The machine or asset requiring maintenance or repair.
Functional Location	The area where the equipment is located.
Title	Title or a brief description of the issue.
Description	A detailed explanation of the issue.
User Status	Tap to change the status of the issue — for example INIT , APPR , RJEC , CLSD , and others.
Maintenance Plant	Populates based on the selected Equipment or Functional Location.
Planning Plant and Planning Group	Populate automatically based on the rules.
Code Group	Displays the issue category (for example, <i>Reactor</i>). Values load dynamically based on the selected Equipment (EQ), Functional Location (FL), or Issue Type.
Code	Shows the reason within the category (for example, <i>Reactor Corrosion</i>).
Reported By	Populates automatically with the logged-in user's full name.
Revision	Select the relevant revision value. Apply with Date Changes automatically updates the Required Start Date and End Date ; Apply without Date Changes keeps the

6. If you need to change the **Equipment** or the **Functional Location**, tap **Change**.

7. Review the **Priority**, and change it if needed.



Note:

Risk assessment data is displayed only when the Priority field is configured with the Risk Assessment Matrix response type. Otherwise, it displays a dropdown populated with SAP priority values filtered by order type.

a. Tap **Priority**.

b. In the **Priority Determination** (risk assessment) screen, select the probability of occurrence of the scenario under each category.

- **People:** the impact of the incident on people.
- **Assets:** the impact of the incident on the asset.
- **Likelihood:** probable occurrence of the scenario.
- **Environmental:** the impact of the incident on the environment.

The SIA calculates the **Overall Priority** — Low, Medium, or High — from the risk level identified across these categories.



Note:

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

c. Tap **Done**.

Figure 4-3 Priority Details

The screenshot shows the 'Priority Determination' screen. At the top, it says 'Priority is determined based on the risk matrix'. Below this, there are several sections:

- People:** Risk Level : High
- Asset:** Risk Level : High
- What is the potential impact on assets due to this risk?** Major
- What is the likelihood of this risk occurring?** Likely
- Risk Level : High** (highlighted in red)
- Likelihood:** Risk Level : High
- Environment:** Risk Level : High
- Overall Priority : High** (highlighted in red)
- Done** button at the bottom.



Note:

You can also select the Priority value manually from the drop-down instead of relying on the Risk Assessment Matrix for automated determination.

8. Tap **Create**.

Figure 4-4 Final Issue Details

The screenshot shows a mobile application interface for reporting an issue. At the top, there's a header with a 'Cancel' button and the title 'Report Issue'. Below this is a toggle switch for 'Is it a Breakdown Issue?'. A link 'Show Equipment History' is present. The 'Functional Location' section shows a dropdown menu with the value '1000-CU2-C02-44200-44200702' and a link 'Show Functional Location History'. The 'Issue Details' section includes a 'Title' field with the text 'Control Valve - No critical issues', a 'Description' field with the text 'No issues detected on the control valve. System is operating within normal parameters and requires no immediate maintenance.', and a 'Priority' dropdown menu set to '3' (Medium). At the bottom, there's a link 'Need adjustments? Update Details' and a large blue 'Create' button.

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

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



Note:

This pop-up helps avoid duplicate reports, such as two technicians each reporting the same oil leak.

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

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



Note:

You can edit the issue until its status changes to Completed or Rejected.

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

9. Add the following details:

- Attachments
- Items
- Causes
- Activities
- Tasks

10. Tap **Report** to create or report the issue.

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

Result

The issue is saved or reported and becomes available for supervisor review.

What Happens When You Create an Issue

When you report an issue related to an asset:

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

Next action

Return to assigned work unless the site process requires immediate escalation.

Next: [Execute a Work Order \(on page 47\)](#).

4.2. Create an Issue from Existing One

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

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

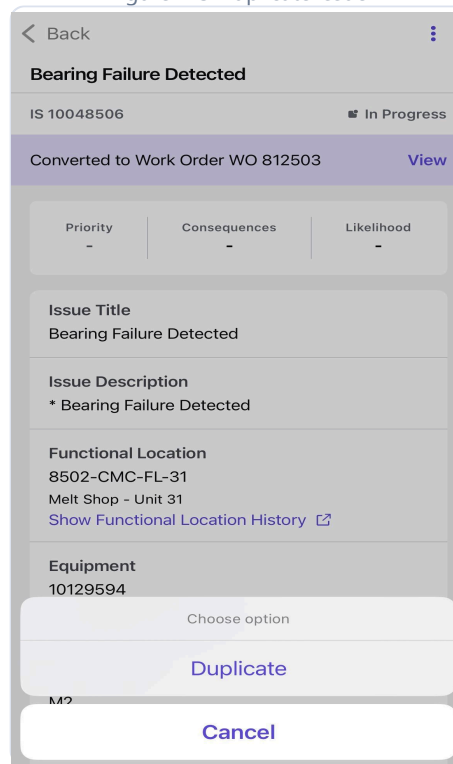
1. Open the issue you want to duplicate.
2. Tap the More



icon on top-right.

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

Figure 4-5 Duplicate Issue



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



Tip:

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

Result

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

Next action

Next: [Execute a Work Order \(on page 47\)](#) — return to the work assigned to you.

4.3. Delink Work Order from Follow-up Issue

Delink a work order when a follow-up issue was associated with the wrong job; the issue itself remains available whether you delink from the Issues screen or from the work order.

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

From the Issues screen

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

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

From the Work Order Details screen

6. In the **Work Order Details** screen, tap **Follow-up Issues**.
7. Select the issue from the list that you want to remove.
8. Tap the More icon next to the issue.
9. Select **Delink from Work Order**.
10. In the confirmation pop-up, tap **Delink**.

Result

From the Issues screen: The work order is delinked, both records remain available, and the Issue status changes to Released.

From the Work Order Details screen: The issue is removed from the work order's Follow-up Issues list. The issue itself is not deleted.

Return to the issue or work order you were reviewing.

4.4. Add Work Logs to a Service Request

Add observations, notes, and other work details to a Service Request as Work Logs directly from the mobile application.

Work Logs sync and remain available when you reopen the Service Request.

1. Open the Service Request.
2. Enter your observations or notes as a Work Log.
3. Save the Work Log.

The Work Log is saved with the Service Request for review and handover.

5. Execute a Work Order

Open the work order assigned to you and tap **Start Job**, then complete the checks shown for that job, do the work, record it, and complete the work order.



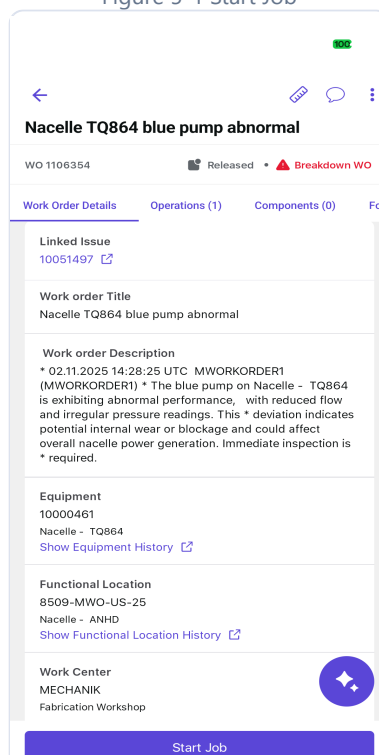
Note:

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

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

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

Figure 5-1 Start Job



Result

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

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

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

Next action

Available actions during execution:

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

Navigation tabs:

- **Work Order Details** — View work order summary.
- **Operations** — View assigned operations.
- **Components** — View components list.
- **Forms** — View and access work order- and operation-specific forms.
- **Attachments** — View work order- and operation-level attachments (organized in separate sections).
- **Tasks** — View tasks in Work Orders. You see tasks and activities, with a count, in the Tasks and Activities section of Work Order Details.

5.1. Operation Status, Confirmation, and Timesheets

Before you start work, see what an operation's status shows, what an Operation Confirmation records, and why Timesheet submission and work-order completion are separate actions.

Operation status reflects reflects real-time status for Work Orders, operations, and timesheets following status reversals or cancellations (e.g., TECO to Released). For multiple assignments, the overall Work Order status is updated based on the individual progress.

Operation confirmation records actual time and details against the operation, such as the technician, actual start and end time, and comments. Operation confirmation and timesheet submission actions are based on the tenant-level configuration.

Split operations divide one operation into splits so multiple technicians can work on it at once, or across shifts. If your operation has splits, select the relevant Split ID when you confirm your portion.

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

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

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

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

Next: [Acknowledge the Permit for Your Job \(on page 49\)](#), then complete the other checks shown before work starts.

5.2. Before Work Starts — When Shown

5.2.1. Acknowledge the Permit for Your Job

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

Permit creation, review, authorization, and issue are performed through iPermits by users with the applicable roles.

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



Warning:

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

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

Result

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

For the complete permit workflow, see [Acknowledge the Permit \(on page 54\)](#).

Next action

Next: [Start an Operation or Sub-operation \(on page 54\)](#), once the other checks shown for the job are complete.

5.2.2. Review the Linked JHA

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

Before you begin

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

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

1. Open the linked JHA from the work order or operation.
2. Review the job steps, hazards, and control measures.
3. Check that the information on the JHA is correct.



Attention:

If any information on the JHA appears incorrect, do not proceed. Report the discrepancy using your organization's escalation method (contact your Supervisor or Safety contact) before starting the operation.

4. Complete the work acknowledgement.

The full acknowledgement procedure — including how to submit, review, and confirm your acknowledgement — is documented in the iPermits guide. See [Work Acknowledgement \(on page 54\)](#).

Result

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

Next action

Next: [Start an Operation or Sub-operation \(on page 54\)](#), once the other checks shown for the job are complete.

5.2.3. Read the Work Instruction Before You Start

When a work-order-level Work Instruction is attached to your job, review it before starting any operation; when an operation has a Work Instruction of its own, read its steps before you start that operation.

Before you begin

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

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

Work-order-level instruction

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

See [Download Work Instructions from Module \(on page 52\)](#) in the DWI Technician guide for the full offline-download procedure.

4. Return to the work order once you have reviewed the instruction.

The full procedure for opening, navigating, and downloading a work-order-level instruction is documented in the DWI Technician guide. See [Access Instructions at Work Order Level \(on page 52\)](#).

Operation-level instruction

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

5. Open the operation.
6. Open **Work Instructions** for that operation.
7. Review the operation-specific steps.

The full procedure is documented in the DWI Technician guide. See [Access Instructions at Operation Level \(on page 52\)](#).

8. Return to the operation to start, pause, resume, or complete the work.

Result

Reviewing the instruction does not change the work order's status, and reviewing an operation-level instruction does not change the operation's status. Start the operation from the work order once you have completed this review.

Next action

Next: [Start an Operation or Sub-operation \(on page 54\)](#), once the other checks shown for the job are complete.

5.2.4. Review the Job Plan

A **Job Plan** provides predefined task steps and planned requirements, such as labor, tools, and materials, for the work you need to perform.

When a Job Plan is associated with a Work Order, you can review the planned work and requirements before starting the job.

- Review the task steps you need to perform.
- Check the planned labor, tools, and materials.
- Use the Job Plan as a reference while performing the work.

5.2.5. Collect Components

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

Check the availability of required components and collect them directly from the Work Order.

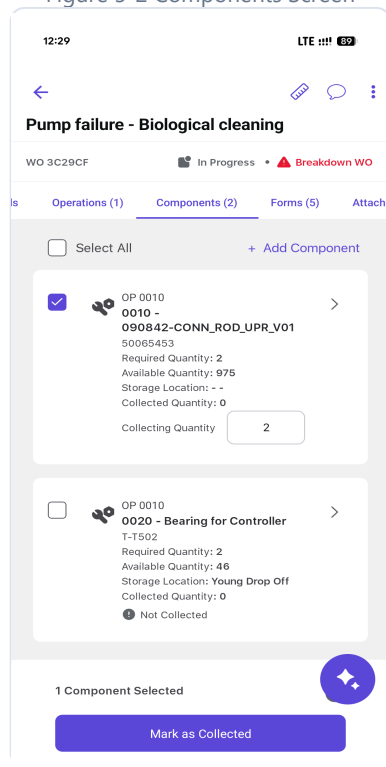
You can view planned materials, storeroom availability, on-hand quantities, and asset-specific spare-part information, including Asset BOM relationships.

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

A list of components, including the associated material, is displayed.

4. Select or scan the QR code to collect the components from the Inventory or Kitting Area.

Figure 5-2 Components Screen



5. After you have collected the required components, tap **Mark as Collected**.

6. Tap **Confirm**.

The status is shown as **Collected**, and the green check mark appears on the QR code.

Result

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

Next action

Next: [Start an Operation or Sub-operation \(on page 54\)](#), once the other checks shown for the job are complete.

5.3. Start an Operation or Sub-operation

After reviewing the required permit, JHA, Work Instruction, components, and forms, start the operation assigned to you. Its status changes to In Progress and execution tracking begins.

See [Operation Status, Confirmation, and Timesheets \(on page 49\)](#) for how starting an operation relates to confirmation and timesheets.

1. Open the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Operations** tab.
4. Select the operation assigned to you.

**Tip:**

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

5. Tap **Start Operation**.

Figure 5-3 Start Operation

12:29 LTE 88%

← 0010 - PM01

Operation Details Components (2) Attachments (0) For

Operation Number
0010

Operation Title
PM01

Description
1M Haul Truck Regular Maintenance

Planning Plant
1000
Hamburg

Work Center
MECH
Mechanical Maintenance

Control Key
PM01
Plant maintenance - internal

Plant
1000
Hamburg

Start Operation

6. To start a **Sub-Operation** instead:
 - a. Tap Sub-Operations.
 - b. Select the Sub-Operation assigned to you.
 - c. Tap **Start Operation**.

Result

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

Next action

Next: [End and Confirm an Operation \(on page 71\)](#), after doing the work and the checks shown for the job.

5.4. During Execution — When Shown

5.4.1. Capture Asset Data using Forms

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

Capture Asset Data using Forms

Use Forms to record readings, inspection results, and equipment status while executing a Work Order.

- For PM and Calibration Work Orders, the inspection form is available based on the form mapped to the Job Plan.
- For Corrective Work Orders, the form is linked based on the asset or Work Order type.

You receive the currently published version of the form. If a Work Order is already in progress, it continues to use the form version that was available when the Work Order started.

1. Open the **Work Orders** screen.
2. Open the assigned work order.
3. Tap the **Forms** tab.
4. Review the available forms and their descriptions and numbers.

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

5. Select the form from the list.

In the Form Details screen, you can:

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

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

**Note:**

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

As you complete the form:

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

Figure 5-4 Fill Form Details

← MJ-01

0/4 Tasks Completed

▼ Section 0/4

Site Conducted

Conducted On

Performed By

Submit

7. Tap **Submit**.

A message, *Form <name> has been submitted successfully*, is displayed. Submitting the form generates a PDF of it and attaches that PDF to the work order.



Note:

You cannot edit the form once it is submitted.

8. In the Success screen, review the PDF that opens for the submitted form.

From this screen you can also:

- Add markup to the PDF if needed, then tap **Save**.
- Tap **Email** to share submitted digital forms via email.
- Tap **Print** to print the form straight from the mobile app.
- Tap **Go to Next Form** to open the next form.
- Tap Close to go back to the forms list.

Result

The form response is validated and submitted or retained as a draft according to its configuration. The generated PDF is attached to the work order.

Next action

A form that has already been submitted can also be converted to PDF later, including while you are working offline.

Next: [End and Confirm an Operation \(on page 71\)](#), after completing the remaining work on the operation.

5.5. As Needed During Execution

5.5.1. Pause an Operation

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

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

1. Open the in-progress operation.
2. Tap **Pause**.
3. Enter the reason for the hold, then tap **Save**.

Your reason and name appear in the work order timeline.

Result

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

Next action

Next: [Resume an Operation \(on page 59\)](#), when work can continue.

5.5.2. Resume an Operation

Continue working on an operation that you previously paused.

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

Result

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

Next action

Next: [End and Confirm an Operation \(on page 71\)](#), after finishing the remaining work.

5.5.3. Reporting and Clearing Blockers (Wrench Time Loss)

Wrench time is the time you spend actively working on a job.

When an issue such as missing parts, permits, scaffolding, or access stops an operation, you can mark it as Blocked and record the reason and responsible party.

The time between reporting and clearing a blocker is recorded as wrench time loss for reporting.

- Blocked is an operation status; the work order status does not change.
- You can report and clear blockers offline. Changes sync when your device reconnects.
- You can block and unblock an operation multiple times. Each occurrence is recorded separately with its own start time, end time, and duration.

Report a Blocker

1. Open the work order and locate the blocked operation on its card or details screen.

2. Tap Report Blocker.

For an **In Progress** or **On Hold** operation, open the 3-dot menu first.

3. Select a **delay reason**. This is required. Select a sub-reason if applicable; sub-reasons are optional.

4. Check **Responsible**. It is prefilled if the reason is linked to a user group in RACE. You can select another group from your plant or remove the selection.

5. If no reason fits, select **Other**, enter a description (required, up to 250 characters), and optionally select a responsible user group.

6. Check **Blocker started at**. It defaults to the current date and time. Change it if the blocker started earlier; future times are not allowed.

7. Tap **Submit**.

Result

After you submit:

- The operation changes to Blocked, and a banner displays the blocker details.
- Your work center supervisor receives a push notification. If no supervisor is mapped to the work center, your reporting manager is notified instead.
- A message containing the operation, reason, sub-reason, responsible party, your name, and the time is posted to work order chat. The responsible user group is named but its members are not notified.
- The timeline records Operation [number] Marked as Blocked (Reason: [reason]), with your name and the time.



Note:

You cannot edit a blocker after submission. To change its details, unblock the operation and report a new blocker.

5.5.3.1. View and Clear Blocker

Open a blocked operation to view the banner at the top of its details screen. It shows the reason, sub-reasons, responsible party, who reported the blocker, and when.

Your device's date, time, and time zone settings fill in the necessary details. The banner displays only the active blocker and disappears when it is cleared. While an operation is Blocked, only Unblock and Start or Resume are available. When the issue is resolved, you can clear the blocker in either of these ways.

1. [Unblock \(on page 61\)](#)
2. [Start or Resume \(on page 61\)](#)

5.5.3.1.1. Unblock Blocker

Unblock a blocker to resolve the issue.

1. Tap Unblock on the operation card or details screen.
2. Check the times:
 - **Blocker started at:** The original start time; cannot be changed.
 - **Unblocked at:** Defaults to the current date and time. You can change it to a time after the blocker started, but not to a future time.
3. Confirm to save.

5.5.3.1.2. Start or Resume to Clear Blocker

If you are ready to continue working, tap **Start** (if the operation was blocked from Not Started or PCNF) or **Resume** (if it was blocked from In Progress or On Hold). The operation moves directly to In Progress, and the blocker is cleared at the same time using the same time validations as Unblock.

In either method, the blocker duration is saved as wrench time loss, and the timeline records Operation [number] Unblocked, with the user and time.

- If someone else clears a blocker you reported, you receive a push notification and a chat message.
- If you clear your own blocker, no push notification is sent. The chat message is still posted.
- Clearing a blocker using Start or Resume also posts a chat message but does not send a push notification.
- A blocker is closed automatically if the operation is confirmed in SAP or the work order is closed (TECO) while the blocker is active.

**Note:**

Push notifications also appear in Alerts. The time in Alerts is when the notification was sent, while the time in the chat message is when the action occurred. These may differ if the action was performed offline.

5.5.3.2. Review Wrench Time Loss

If Display wrench loss in the operation confirmation screen is enabled for your plant, the operation confirmation screen displays each blocker recorded for that operation, including its reason, sub-reason, duration, and the total loss.

If no losses are recorded, the total is 0. An active blocker continues accumulating time using your device clock.

If Wrench loss edit in operation confirmation is also enabled, you can edit a loss:

1. Tap the **Edit** option beside the reason.
2. Change the start time, end time, or both.
3. Save to update the duration and totals.

Neither time can be in the future, and the end time cannot be earlier than the start time. If the times are invalid, an error message appears and the original values remain unchanged. Canceling or navigating back without saving also leaves the record unchanged.

**Note:**

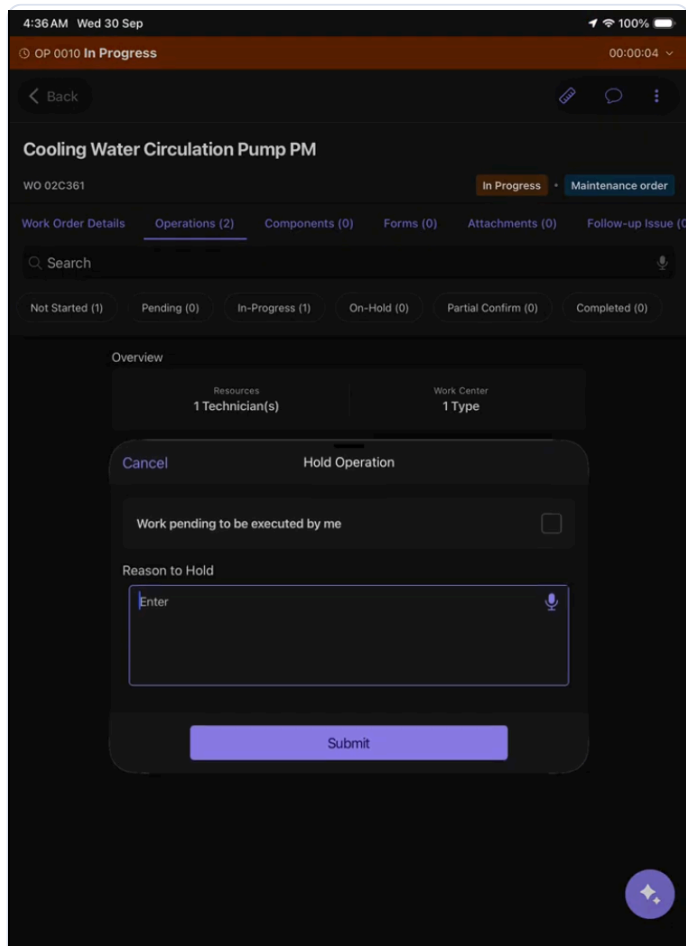
This screen shows losses for the current operation. To review totals across all operations and confirmations, use the work order's Wrench Loss tab.

5.5.4. Put Work on Hold

Put a Work Order, Activity, or Task on hold when work needs to pause, and record the reason when required.

1. Open the Work Order, Activity, or Task.
2. Select the applicable **hold or delay status**, such as **Waiting for Parts** or **In a Meeting**.
3. Select the **delay reason** when prompted.
4. Confirm the status change.

Only status actions available for the current Work Order status and your role are displayed. The selected reason is saved with the status change for audit purposes. If the status update cannot be submitted, your selection is retained so you can retry. Changes made offline sync when connectivity is restored.



5.5.5. Confirm Multiple Operations at Once

When you have finished several operations on the same work order, log the time and confirm them together instead of one at a time.

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

5. Select the **Select All** check box, or select the check box for each operation you want to confirm.

6. Tap **Log Time**.

7. In the **Log Time** screen, expand each operation and fill in these details:

- Technician
- Data Entry Profile
- Actual Start Time
- Actual End Time
- Total Duration
- Comments
- No Work Remaining
- Final Confirmation

**Note:**

In this screen, you can:

- Tap **Add New Log** to add multiple logs for the same operation.
- Tap the **History** icon to view the history of previously confirmed operations.
- Tap the **Copy** icon to copy the log and edit the details if required.
- Tap the **Delete** icon to delete the log.

8. Tap **Mark as Completed**.

Result

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

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

Next action

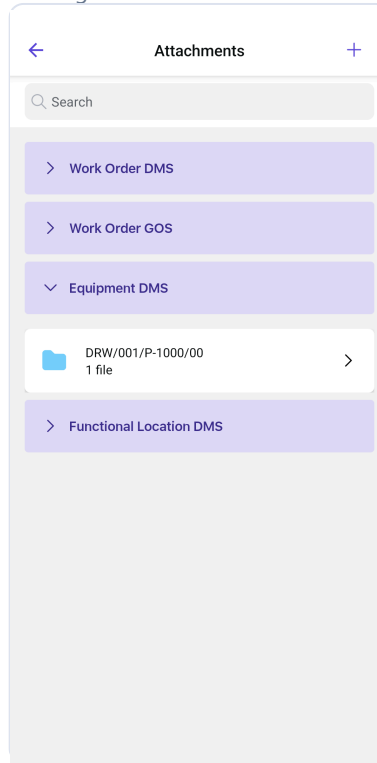
Next: Return to [Execute a Work Order \(on page 47\)](#).

5.5.6. Add Attachments

While working on a work order, attach photos, videos, PDFs, or voice recordings to show the work you performed.

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

Figure 5-5 Add Attachments



4. Tap the Add Attachment  icon on the top right corner.

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

**Note:**

On PDFs and images, you can zoom in for detail, zoom out for context, and reset the view at any time.

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

**Note:**

When you add images, the Work Order GOS section expands automatically.

7. Tap **Save**.

Result

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

You can upload, retrieve, and view attachments, including previously cached files when offline.

Next action

Next: Return to the operation and finish the remaining work, then [End and Confirm an Operation \(on page 71\)](#).

5.5.7. Report a Follow-up Issue

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

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

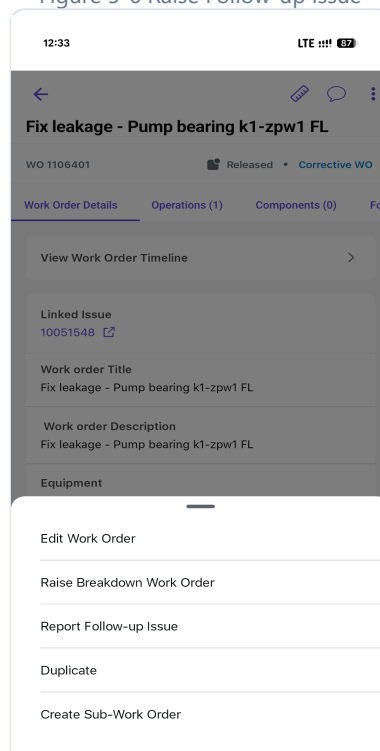
For example, while replacing a pump motor, you notice that the nearby pipe has a small leak. You can log it as a follow-up issue on the spot instead of noting it down to report later.

1. Open the work order.

2. Tap the More  icon in the top-right corner.

3. Select **Report Follow-up Issue**.

Figure 5-6 Raise Follow-up Issue



4. In the **Report Follow-up Issue** screen, describe the problem in the AI Assistant text box.

Include the equipment, functional location, and severity. For more information, see [Create an Issue \(on page 36\)](#).

Result

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

Next action

Next: Return to [Execute a Work Order \(on page 47\)](#).

5.5.8. Create a Follow-Up Work Order

Create a separate Work Order when you find additional work to execute.

This is different from Report Follow-up Issue, which is used to report an issue found during the current Work Order.

1. Open the current Work Order.
2. Tap the More icon in the top-right corner.
3. Select Create Follow-Up Work Order.
4. Review the pre-populated Asset, Location, and source Work Order details.
5. Add the scope of the new work and submit.

The new Work Order is created and linked to the original Work Order. The original Work Order remains unchanged, and you can view the relationship under the Related Records tab.

If offline creation is configured, the follow-up Work Order is submitted when connectivity is restored without creating a duplicate.

**Note:**

Use Report Follow-up Issue when you need to report a newly found problem. Use Create Follow-Up Work Order when the additional work needs to be tracked as a separate Work Order.

5.5.9. View Related Work

View related Service Requests and Work Orders, as well as previous work performed on the same asset or location, directly from the record you are working on. You can review relevant work without performing a separate search.

A Service Request remains linked to the Work Order when it is converted to a Work Order.

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

Check which follow-up issues are already linked to the work order you are working on, and open one to see its details.

Before you begin

A follow-up issue must already be linked to the work order.

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

**Note:**

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

Result

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

Next action

Next: Return to [Execute a Work Order \(on page 47\)](#).

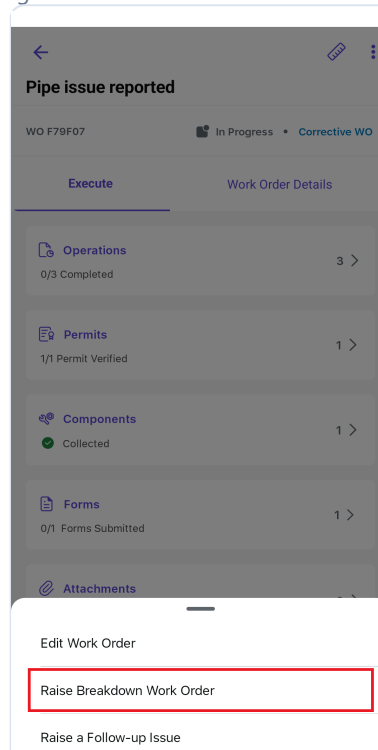
5.5.11. Create an Emergency Work Order

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

1. Open the **Work Orders** screen.
2. Open a work order.

3. Tap the More  icon in the top-right corner and select **Raise Breakdown Work Order**.

Figure 5-7 Raise Breakdown Work Order



4. In the **Create Work Order** screen, enter the details and submit.

For more information, see the *Create Work Order* topic in the Supervisors user guide.

Result

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

Next action

Next: Return to *Execute a Work Order (on page 47)* and continue the work order you were already on.

5.5.12. Report a Problem with a Work Instruction

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

Your feedback helps the authoring team correct or improve a published instruction.

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

The full feedback procedure, including supported attachment types, is documented in the DWI Technician guide. See [Provide Feedback for Work Instructions \(on page 71\)](#).

Result



Warning:

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

Next action

Next: Return to [Execute a Work Order \(on page 47\)](#) only when the published instruction and the conditions at the job site let you continue safely.

5.6. End and Confirm an Operation

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

See [Operation Status, Confirmation, and Timesheets \(on page 49\)](#) for how confirmation relates to timesheet submission and work-order completion.

Before confirming an operation, review your wrench time losses and update any missed or incorrect entries.

1. Open the **Wrench Time Losses** section to review the total wrench time loss and individual losses recorded for the operation.
2. Add a missed wrench time loss, if required.
3. Correct the **start and end times** of a recorded loss, if needed.
4. Review the operation details and confirm the operation.

The updated wrench time losses are included with the confirmation. Once recorded, wrench time losses are available as read-only entries in **Confirmation / Timesheet History**.

Any open blocker on the operation automatically closes when the operation is confirmed. The blocked time remains available for wrench time reporting and in the operation timeline.

1. Do the work assigned to the operation.
2. When the work is finished, tap **End Operation**.

Figure 5-8 End Operation

12:30 LTE 88

← 0010 - 1M Haul Truck Regu... ▾

Operation Details Components (2) Attachments (0) For

Operation Number	0010
Operation Title	PM01
Description	1M Haul Truck Regular Maintenance
Planning Plant	1000 Hamburg
Work Center	MECH Mechanical Maintenance
Control Key	PM01 Plant maintenance - internal
Plant	1000 Hamburg

Hold End Operation

3. In the **End Operation** screen, review and complete the following:

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

Figure 5-9 Log Timesheet

The screenshot shows a mobile application interface for the 'End Operation' screen. At the top, the status bar displays '12:31' and 'LTE' with signal strength bars. Below the status bar is a navigation bar with a back arrow and the title 'End Operation'. The main content area is a form with several sections, each with a dropdown arrow on the left. The sections are: 'Section' (purple header), 'Technician' (dropdown menu showing 'Nagarjuna Kola' and email 'nagarjuna.kola@innovapptive.com'), 'Data Entry Profile' (dropdown menu showing 'ISP_ALL'), 'Actual Start Time' (calendar icon and date '11/04/2025 12:29'), 'Actual End Time' (calendar icon and date '11/04/2025 12:30'), 'Total Duration' (text field showing '00 hr 01 min 02 sec'), and 'Long text' (text area). At the bottom is a blue 'Submit' button.

4. Tap **Submit**.

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



Note:

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

Result

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

Next action

Next: Surrender the permit when the job used one. (on page 75)

5.7. Surrender the Permit

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

Before you begin

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

Surrendering is the Permit Holder's action to hand the permit back once work is finished. It moves the permit toward closure but does not close it — closure is performed by the Issuer. See [Close the Permit \(on page 75\)](#) for that step.

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

Result

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

Next action

Next: Submit a Timesheet (on page 75).

5.8. Submit a Timesheet

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

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

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

Result

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

Next action

Next:

- Complete the work order when all required records are finished. *(on page 77)*
- Correct and resubmit the timesheet if the supervisor rejects it. *(on page 76)*

5.9. Correct and Resubmit a Rejected Timesheet

When your supervisor rejects a timesheet entry, correct the details, explain the changes in a comment, and resubmit it for review.

1. Tap **More**.
2. Open the **Timesheet** module.
3. Select the rejected work log from the list.

4. Update or correct the details based on your supervisor's feedback.
5. Add a comment explaining the changes or providing clarification.
6. Tap **Resubmit**.

Figure 5-10 Resubmit Timesheet

The screenshot shows a mobile app interface for resubmitting a timesheet. At the top, the status is '0010 - REV FROM SAP-1'. A red banner indicates 'Timesheet Rejected' with the reason 'Rejection Reason: Not completed.' and the user 'By Arya D on 06/06/25, 3:10 PM'. Below this, there are several input fields: 'Technician' (with a red asterisk), 'Data Entry Profile' (set to '07-CA-03' with a dropdown arrow), 'Actual Start Time' (set to '05/06/2025 6:25 PM' with a calendar icon), 'Actual End Time' (set to '05/06/2025 6:25 PM' with a calendar icon), and 'Total Duration' (with a red asterisk).

Result

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

Next action

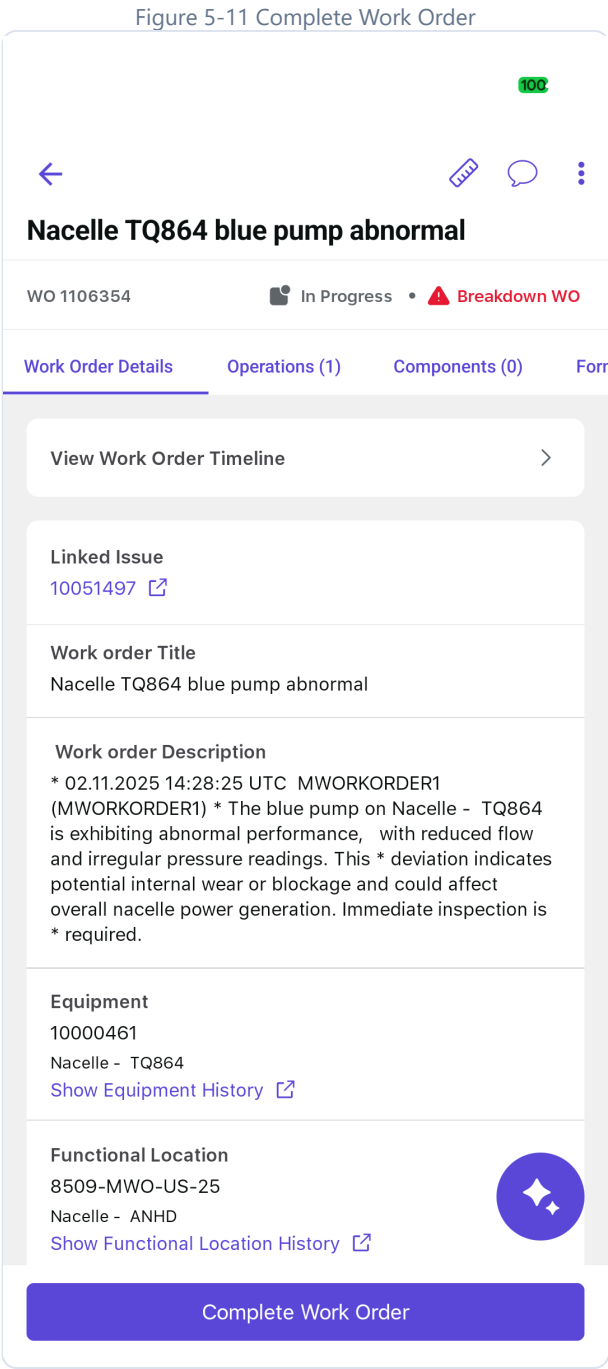
Next: Return to [Complete a Work Order \(on page 77\)](#).

5.10. Complete a Work Order

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

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

1. Open the work order.



2. Tap **Complete Work Order**.



Note:

If any operations or tasks are still pending, an alert message is displayed. Finish the pending work before you complete the work order.

3. In the **Complete Work Order** screen, add a note and any other attachments.

Attachments can include DMS, GOS, images, videos, or PDFs.

Figure 5-12 Add Note and Complete

← **Complete Work Order**

Add Note

Completed

Supporting Media +

Work Order DMS

Document DMS

Work Order DMS

Document DMS

Complete

4. Tap **Complete**.

Result

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



Note:

Open blockers are automatically cleared when the operation is confirmed in SAP or the Work Order is TECO'd.

6. Look Up Equipment and Locations

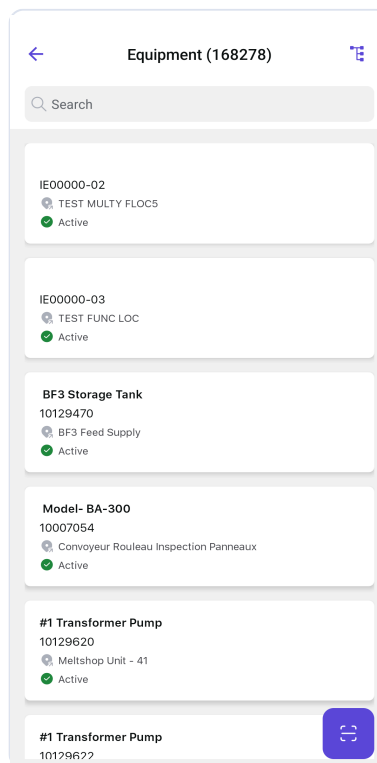
6.1. View Equipment Details

Look up an asset before or during a job to check its details, the work orders and issues already raised against it, its documents, and its Measuring Point readings.

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

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

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



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

Result

The selected equipment record opens so you can report an issue, review related work, and take readings.

Review Related Work and Asset Information

Use Asset 360 Dashboard to review an asset's current status, recent Work Orders, issues, and maintenance history in one place. You can filter records using the same status and type values shown on the records and open a Work Order directly from the dashboard.

1. Open the equipment **Dashboard**.
2. Review the equipment information, including related Work Orders, issues, status, history, trends, and alerts.
3. Use the available status and type filters to find relevant records.
4. Open a Work Order or issue to review its details, then return to the asset.
5. Open the applicable record when follow-up is required.

Use [Report an Issue \(on page 36\)](#) when a condition requires follow-up.

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

Result

You can identify related maintenance activity and continue with an available role-based action to follow up on identified maintenance activity.

Review Equipment Master Data and Documents

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

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

Result

The equipment master data and available supporting documents are displayed.

Review Measuring Points and Readings

Before you begin

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

1. Open **Measuring Points**.
2. Search by measuring-point number or description when required.
3. Review the Measuring Point ID, position, description, last reading, and available history.
Open the reading history or select **Take Reading** when the action is available.
4. Use the Add action to create a measuring point only when your role and site process permit master-data creation. See [Create a Measuring Point \(on page 83\)](#).

Result

The selected measurement history or reading-entry screen opens.

6.1.1. Create a Measuring Point

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

Before you begin



Note:

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

1. Open the **Equipment** module.
2. Select the equipment from the list.



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

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

Figure 6-1 Create Measuring Point

Basic Information

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



Note:

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

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

Measurement Range

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

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

Result

The measuring point is created or submitted according to your permissions and the synchronization state of your device.

Next action

Next: Return to the operation and complete the remaining work before confirmation.

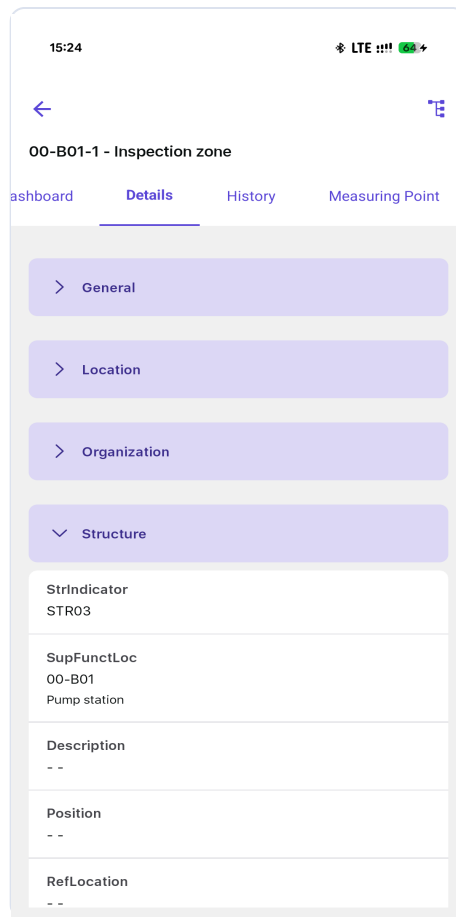
6.2. View Functional Location Details

When you need maintenance information about a fixed plant location or system, open its functional location to check the hierarchy, associated equipment, documents, history, and measuring points.

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

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

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



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

Result

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

Review Functional Location Information

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

1. Open the functional location **Details** tab.
2. Review the applicable information sections.
3. Open the linked equipment or supporting documents if you need more information.

Result

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

Review Maintenance History

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

Result

The selected historical maintenance record is displayed.

Review Measuring Points and Readings

Before you begin

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

1. Open **Measuring Points**.
2. Review the measuring-point ID, position, description, last reading, and available history.
3. Open the reading history or select **Take Reading** when the action is available.
4. Create a measuring point only when your role and site process permit master-data creation. See [Create a Measuring Point \(on page 83\)](#).

Result

The selected measurement history or reading-entry screen opens.

7. Troubleshoot Common Problems

What to check first when the application does not behave as this guide describes.

Each entry below names what you are seeing, what may be behind it, and where the full procedure is documented. Where the cause is a configuration setting, your administrator has to change it — see [What Your Administrator Controls \(on page iv\)](#).

A record stays in the Outbox and does not sync

The record failed a validation or posting check, or the device has no connectivity.

Full procedure: [Recover from a Failed Synchronization \(on page 35\)](#).

A work order appears as one Outbox record even though you changed several things

A work order and its operations, components, forms, issues, and measurements sync as one consolidated Outbox record.

Check the current activity shown against the record — it tells you which part is being processed. Wait for the record to clear before closing or completing the work.

Your timesheet was rejected

Your supervisor returned the entry with feedback.

Correct the entry, add a comment explaining the change, and resubmit it. See [Correct and Resubmit a Rejected Timesheet \(on page 76\)](#).

The job has a permit or a linked JHA attached

Both are reviewed before the work begins.

Acknowledge the permit and review the linked JHA before starting. See [Acknowledge the Permit for Your Job \(on page 49\)](#).

A field, screen, or action described in this guide is missing

The module is disabled for your tenant or plant, the field is not part of the published field configuration template, or your role does not permit the action.

None of these can be changed from the application. Ask your administrator which setting applies — see [What Your Administrator Controls \(on page iv\)](#).

An AI-assisted capability is not offered

AI agents are enabled individually at tenant and plant level, and they are unavailable while you are offline.

Restore connectivity first. If the capability is still not offered, ask your administrator whether that AI agent is enabled for your plant.

A Work Instruction is wrong, unclear, or does not match the asset

The published instruction needs correction by its author.

Report it from the instruction itself so the author receives it with the work order context. See [Report a Problem with a Work Instruction \(on page 71\)](#).

Work Instruction media does not open while you are offline

Instruction media is downloaded separately from the work order record.

Download the instruction media before going offline. See [Read the Work Instruction Before You Start \(on page 51\)](#).

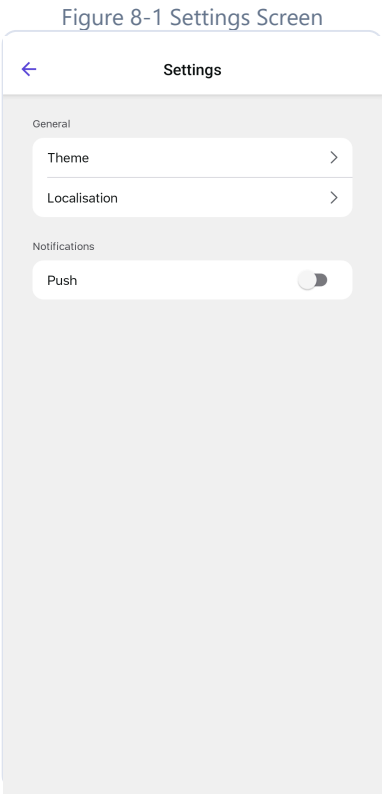
8. Settings, Help, and Profile

8.1. Switch between Dark and Light Modes

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

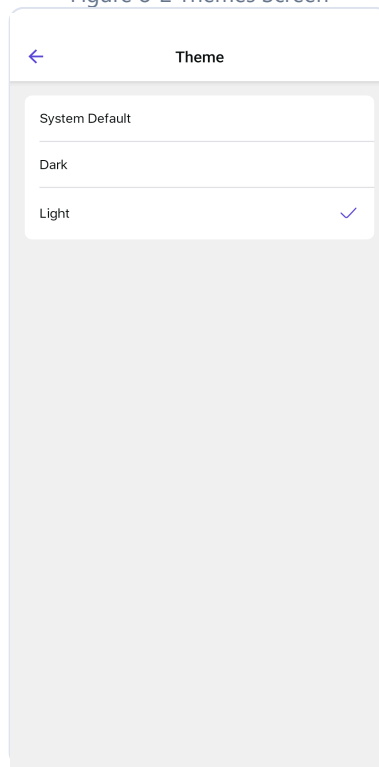
Use the theme setting to improve visibility in different lighting conditions.

1. Open the **More** screen and tap **Settings**.



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

Figure 8-2 Themes Screen



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

Result

The selected theme is applied across the application.

8.2. Choose Language

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

The available languages depend on the currently selected plant.

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

Figure 8-3 User Preference Screen

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

Result

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

8.3. View User Profile

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

Open the **More** screen and tap **Profile**.

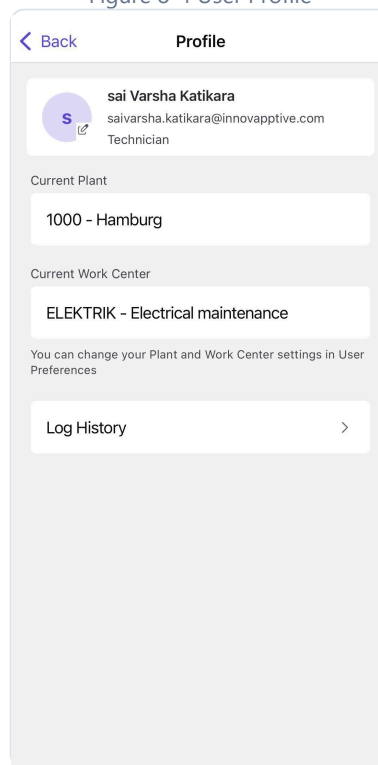
Or

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

The **Profile** screen shows the following details:

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

Figure 8-4 User Profile



Result

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

8.3.1. View Log History

Check the Log History to see the actions you performed during your login session and the synchronization state of each one.

1. Open the **Profile** screen.

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

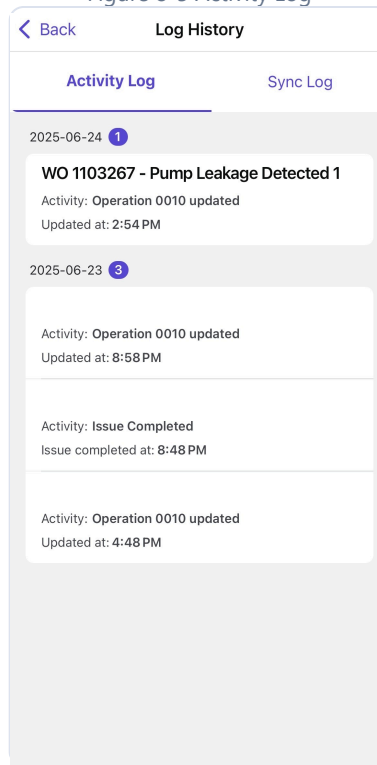
The **Log History** screen has following two tabs:

Activity Log

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

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

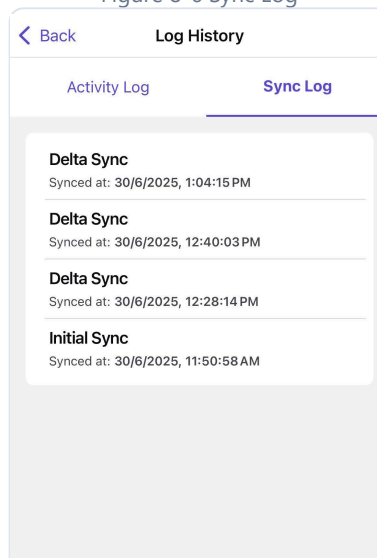
Figure 8-5 Activity Log



Sync Log

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

Figure 8-6 Sync Log



Result

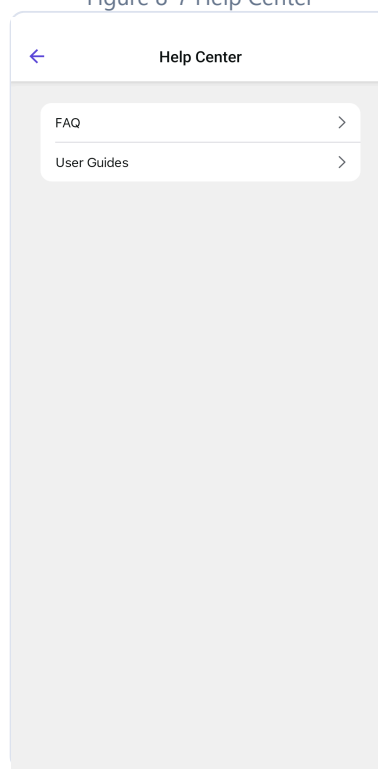
The selected activity or synchronization history is displayed.

8.4. Access Help Center

Look up answers in the FAQs and user guides available inside the application.

1. Open the **More** screen and tap **Help Center**.

Figure 8-7 Help Center



The Help Center provides two main topics:

- **FAQ** – Frequently Asked Questions related to different modules.
- **User Guides** – Detailed guides on using various features.

2. Tap **FAQ** to view common questions and solutions.

- Use the search bar at the top to find specific topics.
- Browse the categories, such as General, Work Orders, Dashboard, Getting Started, and Issues. Tap on a topic to view more details.

3. Tap **User Guides** to access detailed instructional content.

- Browse the guides to learn more about app features.

Result

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