



# Smart Maintenance Task Manager

User Handbook

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For finer-grained navigation, use the *Bookmarks* or *Outline* panel in your PDF reader, or visit the live handbook online.

# Smart Maintenance Task Manager — User Handbook

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Welcome. This handbook shows you how to use the Smart Maintenance Task Manager to plan, assign, execute, and report on maintenance work across your organisation.

The platform has **two apps** — a web portal and a mobile app — and **seven user roles**. Start with the role that matches how you use the system.

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## Start here

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### I execute tasks in the field

Use the **Mobile App** to receive assignments, run inspections, capture photos, and submit repair requests.

[Technician handbook →](#)

### I map assets and define tasks

Build the asset hierarchy, create task points, write NFC tags, and configure components.

[Mapper handbook →](#)

### I assign and approve work

Monitor progress, assign tasks to technicians, approve completed work, and keep crews running.

[Supervisor handbook →](#)

### I look at reports

Review dashboards, export reports, and measure performance across sites.

[Manager handbook →](#)

### I administer the system

Create users, configure roles, manage master data, and own company settings.

[Admin handbook →](#)

### I just need to see what's happening

Read-only access to dashboards, tasks, and reports for audit and compliance.

[Viewer handbook →](#)

Unsure? Open [Choose your role](#) for a decision tree.

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## New to the platform?

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1. Read [What is Smart Maintenance Task Manager?](#) for a two-minute overview.
  2. Skim [The apps](#) so you know which app you'll use for what.
  3. Follow [Your first login](#).
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## How this handbook is organised

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Section	When to read it
<a href="#">Getting started</a>	On day one, or when onboarding a new team member.
<a href="#">User guide &gt; By role</a>	For a complete tour of everything your role can do.
<a href="#">User guide &gt; Web portal</a>	When you're looking at a specific screen in the browser.
<a href="#">User guide &gt; Mobile app</a>	When you need step-by-step help on a phone or tablet.
<a href="#">Reference</a>	Lookup tables — permissions, task types, icons, languages, shortcuts.
<a href="#">Troubleshooting</a>	"Something isn't working."
<a href="#">Glossary</a>	Domain-specific terminology.

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## Getting help

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- **Something's broken:** check [Troubleshooting](#) first.
- **Still stuck:** see [Contact support](#).
- **A term you don't recognise:** look in the [Glossary](#).

# Getting started

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# Getting started

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New to Smart Maintenance Task Manager? Start here.

## On this page

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The Getting started section is designed to be read in order the first time you use the platform. Each page takes two to five minutes.

1. [What is Smart Maintenance Task Manager?](#) — a two-minute, non-technical overview.
2. [The apps](#) — when to use the web portal vs. the mobile app.
3. [Roles and responsibilities](#) — who does what on the platform.
4. [Choose your role](#) — find the right handbook entry for your job.
5. [Your first login](#) — step-by-step first sign-in.
6. [Language and locale](#) — switch the platform to your preferred language.

## After getting started

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Once you've signed in, open the [role-based handbook](#) that matches your responsibilities. Every action in the platform is documented there with screenshots and step-by-step instructions.

# What is Smart Maintenance Task Manager?

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Smart Maintenance Task Manager is a multi-tenant platform for planning, executing, and reporting on industrial maintenance work. It keeps lubrication, mechanical, electrical, and production tasks on schedule across factories, production lines, assets, and individual task points.

## What problem does it solve?

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Maintenance work in large plants is high-volume and safety-critical. Teams need to know:

- **What** needs to be done today, tomorrow, and next month.
- **Who** is assigned to each task.
- **Where** every asset is and what condition it's in.
- **When** a task was last performed — and by whom.
- **Why** something went wrong, if it did.

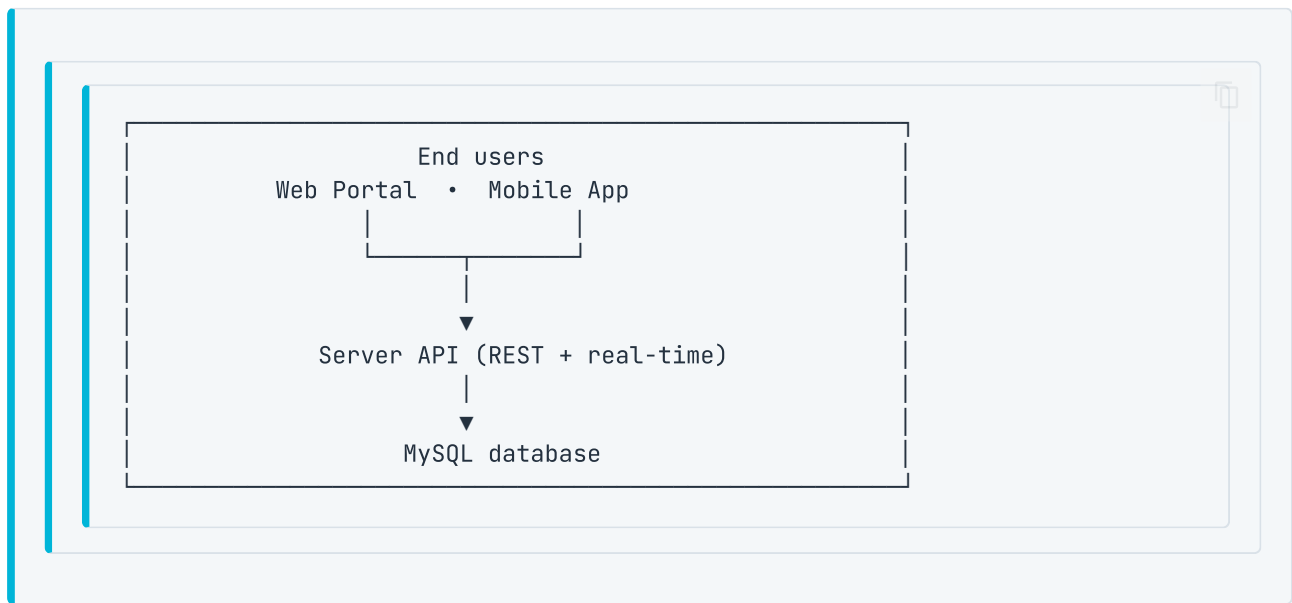
The platform answers all of these in one place, with a web portal for planning and reporting, a mobile app for field execution, and real-time sync between them.

## What's in the platform?

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- A complete **asset hierarchy** — production sites, lines, sections, assets, and task points.
- A **task catalogue** covering five task types: lubrication, maintenance, electrical, production, and repair requests.
- **Scheduling** with recurring rules, shift patterns, and ad-hoc assignments.
- **Mobile execution** with offline-first sync, NFC scanning, barcode scanning, and photo capture.
- **Safety procedures** linked to every task that needs them, with acknowledgement tracking.
- **Shutdown reporting** for safety incidents and production stoppages.
- **Reporting dashboards** covering completion rates, OEE, technician performance, asset availability, and more.
- **Multi-tenant**: one installation serves many companies, each scoped to its own data.
- **14 languages** with full translations (including RTL support where needed).

## How does it fit together?



- The **Web Portal** is where admins, supervisors, and managers plan, assign, and report.
- The **Mobile App** is where technicians and mappers work in the field.

See [The apps](#) for when to use which.

## Who uses it?

Seven roles are built in:

Role	What they do
Technician	Executes assigned tasks in the field.
Mapper	Builds and maintains the asset hierarchy.
Supervisor	Assigns work, approves completions, monitors progress.
Manager	Reviews reports and dashboards.
Admin	Manages users, roles, and company-wide settings.
Viewer	Read-only access for audit and compliance.
PegotecUser	Platform staff with cross-tenant support access.

See [Roles and responsibilities](#).

## Next

- [The apps](#)

- [Choose your role](#)

# The apps

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Smart Maintenance Task Manager has two end-user applications. Each serves a specific set of users and use cases. Use this page to pick the right one for the job in front of you.

## At a glance

App	Platform	Best for	Who uses it
<b>Web portal</b>	Any modern browser	Planning, assignment, approvals, reports, admin	Admins, Supervisors, Managers, Mappers, Viewers, PegotecUser
<b>Mobile app</b>	iOS 15+ / Android 7+ (API 24+)	Executing tasks in the field	Technicians, Mappers

## Web portal

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The web portal is a browser-based admin panel. It's the fastest and most comfortable place to:

- Plan and schedule maintenance work.
- Assign tasks to technicians using a drag-and-drop interface.
- Approve or reject completed work.
- Run reports and export data.
- Manage users, roles, and company-wide settings.
- Build and edit the asset hierarchy (also available in the mobile app).

You can use the web portal on a desktop, laptop, or tablet. It's responsive but optimised for larger screens.

[Open the web portal handbook →](#)

## Mobile app

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The mobile app is the daily driver for field technicians and mappers. It works **offline-first**: you can execute tasks all day without a network connection, and the app syncs automatically when you're back online.

Use it to:

- Receive task assignments and see your daily schedule.

- Execute tasks with dynamic forms that adapt to each task type.
- Scan NFC tags and barcodes to jump directly to an asset.
- Capture photos and attach them to reports.
- Submit repair requests and shutdown reports.
- (Mappers) Build asset hierarchies and write NFC tags.

The app is available for iOS (15+) and Android (7.0+ / API 24+).

[Open the mobile app handbook →](#)

## Which app should I use right now?

Task	Use
Plan next week's schedule	Web portal
Assign tasks to a technician	Web portal
Approve a task that was just completed	Web portal
Export a monthly report	Web portal
Create a new user	Web portal
Execute a task on the shop floor	Mobile app
Scan an NFC tag to open an asset	Mobile app
Write an NFC tag to a new asset	Mobile app (mapper only)
Submit a repair request from the field	Mobile app
Report an equipment shutdown	Mobile app
Build a new production line's asset tree	Web portal or mobile app

## Next

- [Roles and responsibilities](#)
- [Choose your role](#)

# Roles and responsibilities

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Smart Maintenance Task Manager has seven built-in roles. A user can be assigned one or more roles, and a role can be held by many users. Permissions come from the role — not from the individual user — which keeps access consistent across an organisation.

## The seven roles

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### Technician

**What they do.** Execute maintenance tasks in the field. Walk the plant, complete task forms, capture photos, scan NFC tags, and submit repair requests or shutdown reports when something's wrong.

**Where they work.** Primarily the mobile app. A minimal web dashboard is available for review purposes.

**Key capabilities.**

- View assigned tasks.
- Execute tasks (fill forms, capture measurements, attach photos).
- Scan NFC tags and barcodes.
- Submit repair requests.
- Report shutdowns.

[Technician handbook →](#)

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### Mapper

**What they do.** Build and maintain the data model that everything else hangs off: production sites, lines, sections, assets, task points, components, tasks, safety procedures. Write NFC tags that link a physical asset to its digital record.

**Where they work.** Both apps. The web portal is easier for bulk editing; the mobile app is essential for NFC writing on the factory floor.

**Key capabilities.**

- Full CRUD on asset hierarchy.
- Full CRUD on tasks, components, schedules, safety procedures.

- Write NFC tags (mobile app only).
- User management (within their company).

[Mapper handbook →](#)

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## Supervisor

**What they do.** Assign work to technicians, monitor progress in real time, and approve completed tasks. They're the human routing layer between what needs doing and who does it.

**Where they work.** Web portal. Mobile access is limited to scanning and oversight.

### Key capabilities.

- View dashboards and tasks.
- Assign tasks (drag-and-drop).
- Approve or reject completed tasks.
- View and export reports.

[Supervisor handbook →](#)

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## Manager

**What they do.** Consume reports and dashboards. The platform's analytics consumers.

**Where they work.** Web portal.

### Key capabilities.

- View dashboards.
- View tasks (read-only).
- View and export all reports.

[Manager handbook →](#)

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## Admin

**What they do.** Run the company's tenant. Create users, assign roles, manage master data (thresholds, units, products, tools), configure company settings, manage NFC tag lifecycle, and handle everything short of cross-company operations.

**Where they work.** Web portal.

### **Key capabilities.**

- Every permission available to a single-tenant role.
- User and role management.
- Company settings.
- Master data CRUD.

[Admin handbook →](#)

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## **Viewer**

**What they do.** Look at data without the ability to change any of it. Intended for auditors, compliance officers, and anyone who needs visibility but not edit rights.

**Where they work.** Web portal.

### **Key capabilities.**

- Read-only view of dashboards, tasks, hierarchy, schedules, safety, components, settings, and reports.
- No create, edit, delete, or assign permissions.
- No mobile access.

[Viewer handbook →](#)

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## **PegotecUser**

**What they do.** Cross-tenant support and platform audit. The only role that can see data from more than one company.

**Where they work.** Web portal, with company-switching between tenants.

### **Key capabilities.**

- All permissions in every company.
- Switch the active tenant context.

[PegotecUser handbook →](#)

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## Role summary

Role	Scope	Web portal	Mobile app
Technician	Company	Limited	☐ Primary
Mapper	Company	☐	☐ Primary
Supervisor	Company	☐ Primary	Limited
Manager	Company	☐ Primary	—
Admin	Company	☐ Primary	☐
Viewer	Company	☐ Only	—
PegotecUser	Global	☐ Primary	☐

For a full permission-by-role matrix, see [Permissions matrix](#).

## Multiple roles

A user can hold more than one role. If you're an Admin **and** a Mapper, you get the union of both permission sets. There's no conflict resolution — more roles means more access.

## Changing roles

Admins change role assignments in **Users** on the web portal. See [User management](#).

# Choose your role

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Pick the description that best matches what you do day to day. Follow the link to open the handbook for that role.

## I execute maintenance in the field

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You walk the plant, inspect equipment, complete task forms, scan NFC tags, capture photos, and flag problems when you find them.

→ [Technician handbook](#)

## I build and maintain the asset structure

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You create production lines, sections, assets, task points, and tasks. You decide what gets inspected, how often, and by whom. You write the NFC tags that physically link equipment to the system.

→ [Mapper handbook](#)

## I assign work and approve completions

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You look at who's available, drag tasks onto their name, and review the work when it comes back. You're the coordinator between planning and execution.

→ [Supervisor handbook](#)

## I look at numbers and make decisions

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You rely on dashboards, reports, and trends. You don't create or edit data — you consume it to steer the operation.

→ [Manager handbook](#)

## I administer the system for my company

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You create user accounts, manage roles, maintain master data (units, products, thresholds, tools), and configure how the platform works for everyone else in your company.

→ [Admin handbook](#)

## I need read-only access for audit or compliance

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You look at tasks, assets, reports, and settings without changing anything. You may be from an external audit firm, internal compliance, or a visiting stakeholder.

→ [Viewer handbook](#)

## I work for Pegotec and support many customers

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You switch between customer tenants to help them, and have cross-tenant visibility for platform audit.

→ [PegotecUser handbook](#)

## Still unsure?

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- Ask your Admin or Supervisor which role you've been assigned.
- On the web portal, open your profile (top-right avatar → **Profile**). Your role is listed there.
- On the mobile app, open **Settings** → **Profile**.

You can hold more than one role. If your profile lists several, read each handbook entry — they're cumulative.

# Your first login

This page walks you through signing in to Smart Maintenance Task Manager for the first time. If you're a field technician setting up the mobile app, skip to [Pairing and setup](#) instead.

## BEFORE YOU START

You need an account. Your company's Admin creates accounts — if you don't have credentials, contact them first.

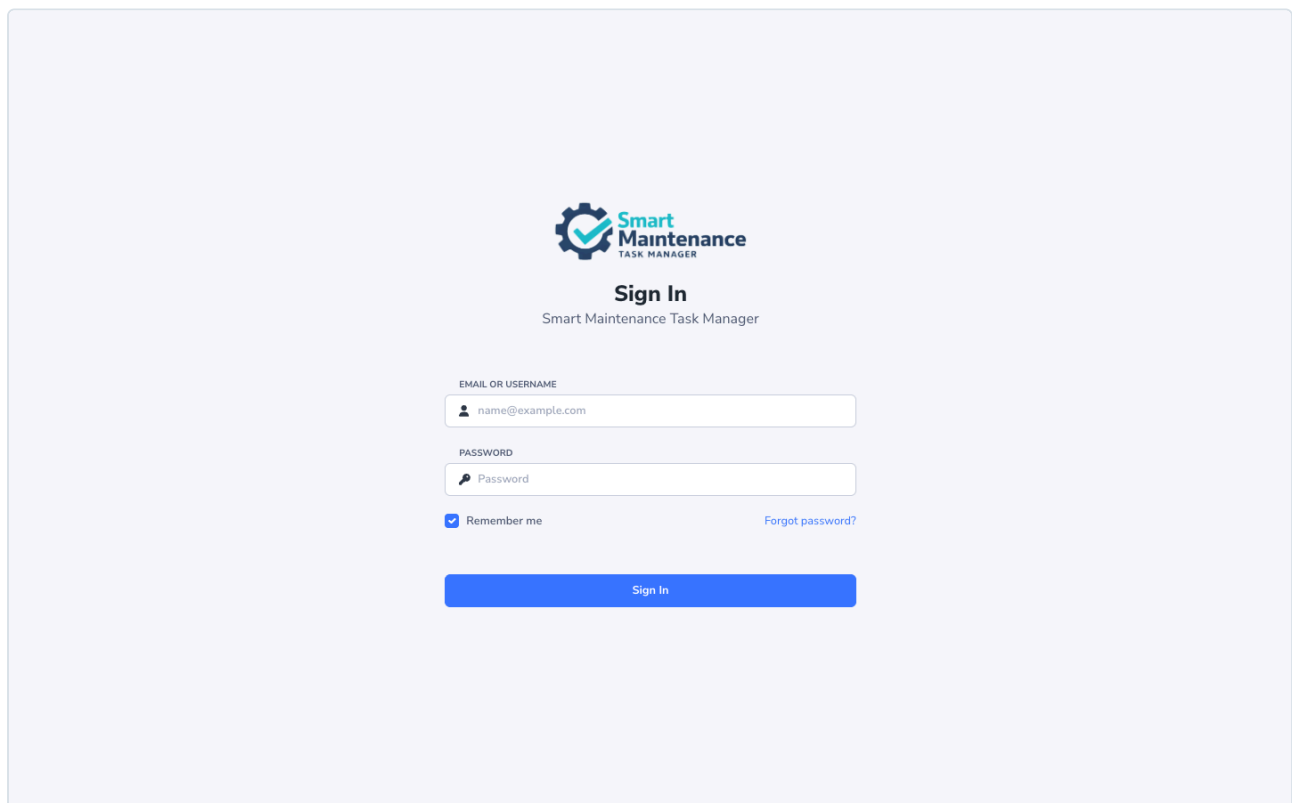
## Steps

### 1. Open the web portal

Your organisation has a dedicated URL. Typical examples:

- Production: `https://portal.sm-tm.app`
- Staging: `https://portal.staging.sm-tm.app`

Your Admin will have sent you the correct URL.



The image shows a screenshot of the Smart Maintenance Task Manager sign-in page. At the top center is the logo, which consists of a gear icon with a checkmark inside, followed by the text "Smart Maintenance TASK MANAGER". Below the logo is the heading "Sign In" and the subtitle "Smart Maintenance Task Manager". The form contains two input fields: "EMAIL OR USERNAME" with a placeholder "name@example.com" and "PASSWORD" with a placeholder "Password" and a small eye icon to toggle visibility. Below the password field is a checked checkbox labeled "Remember me" and a link "Forgot password?". At the bottom of the form is a blue "Sign In" button.

## 2. Enter your credentials

Type your **email** (or **username**) and **password**, then click **Sign in**.

If you forgot your password, click **Forgot password?** and follow the instructions. A reset link will arrive by email from `noreply@sm-tm.app`.

### DIDN'T RECEIVE THE RESET EMAIL?

Check your spam folder first. If it's not there, contact your Admin — the email address on your account may be out of date.

## 3. Confirm your company

If your account belongs to multiple companies (rare), you'll be asked which company context to use. Pick one and click **Continue**.

## 4. Land on the dashboard

You're in. The screen you see first depends on your role:

Your role	Landing page
Technician	Tasks list
Mapper	Asset hierarchy
Supervisor	Dashboard
Manager	Dashboard
Admin	Dashboard
Viewer	Dashboard
PegotecUser	Dashboard

## Change your password

1. Click your avatar in the top-right.
2. Click **Profile**.
3. Click **Change password**.
4. Enter your current password and choose a new one (minimum 8 characters).
5. Click **Save**.

## Set your language

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By default the platform uses your browser's language (if supported). To change it manually:

1. Avatar → **Profile**.
2. Open the **Language** dropdown.
3. Pick your preferred language and click **Save**.

Fourteen languages are supported. See [Supported languages](#).

## Next steps

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- Technicians: continue to [Pairing and setup](#) to install the mobile app.
- Supervisors / Admins: open the [role handbook](#) for your role.
- Everyone: skim [Navigating the portal](#) to learn the layout.

# Language and locale

The platform is fully translated into 14 languages. Every user can pick their preferred language independently — your setting doesn't affect your colleagues.

## Supported languages

Code	Language	Native name
en	English	English
de	German	Deutsch
es	Spanish	Español
fr	French	Français
it	Italian	Italiano
nl	Dutch	Nederlands
pt	Portuguese	Português
ro	Romanian	Română
tr	Turkish	Türkçe
ar	Arabic	العربية
bn	Bengali	বাংলা
id	Indonesian	Bahasa Indonesia
th	Thai	ไทย
zh	Chinese	中文

Arabic renders right-to-left automatically.

## Change your language

### Web portal

1. Click your avatar (top-right) → **Profile**.
2. Open the **Language** dropdown.
3. Select a language and click **Save**.

The portal reloads in your chosen language.

## Mobile app

1. Open the app.
2. Tap the menu → **Settings** → **Language**.
3. Tap a language and confirm.

The app reloads automatically.

## How translations are kept up to date

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- Pegotec maintains the master translation database centrally.
- Each installation pulls updates automatically on a schedule.
- New features roll out with English first; other languages typically follow within a few days.
- If you see an untranslated string, it will still work — it just falls back to English.

## Automatic refresh on mobile

The mobile app downloads new or updated translations as part of its regular background sync (every ~15 minutes on Android, up to 60 minutes on iOS). You don't have to do anything — updates appear the next time the app syncs.

If you've just been told "a new language is live" and it isn't in your picker yet, the refresh is probably still pending. Options:

- **Settings** → **Force sync** on mobile — pulls the latest translation bundle immediately.
- Or sign out and back in — forces a full refresh including translations.

On the web portal, translations refresh on every page load.

## Report a translation problem

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If a string is wrong, awkward, or missing:

- Customers: contact your Admin, who can raise it with Pegotec support.
- Admins: see [Contact support](#).

## What a language change does and doesn't affect

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**Affects:**

- Menu labels, buttons, form field names.
- Notification text.
- Report column headings.
- In-app help text.

**Does not affect:**

- Names of assets, lines, sections, or task points (these are stored as typed by the mapper).
- Names of users, companies, or components.
- Existing task data, comments, or attachments.
- Date format (controlled separately by your regional settings).

## Related topics

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- [Supported languages](#) — full reference with RTL support notes.

# First hour

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# First hour on the platform

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A 60-minute quick-start per role. Skip the full handbook on your first day — read the one-pager for your role, then come back to the deep guides when you need them.

## Pick your role

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- **Technician** — mobile-first field execution.
- **Mapper** — hierarchy and task setup.
- **Supervisor** — assignment and approvals.
- **Admin** — initial tenant configuration.

## Not listed?

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Other roles don't need a dedicated first-hour track — they can start from their role handbook directly:

- **Manager** — consume reports; nothing to set up.
- **Viewer** — read-only; no setup.
- **PegotecUser** — internal, onboarded by Pegotec directly.

# First hour — Technician

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A 60-minute quick start. You'll sign in, pair the mobile app, and complete one task end-to-end.

## WHAT YOU NEED BEFORE YOU START

- An account (your Admin has created one).
- A smartphone or tablet that meets [System requirements](#).
- A QR code from your Admin (or the API URL written down).

## 0–10 min — Install and pair

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1. Open the App Store (iOS) or Play Store (Android) on your device.
2. Search for **Smart Maintenance Task Manager**. Install.
3. Open the app. Grant **Camera** permission when prompted.
4. Tap **Scan QR code**. Point the camera at the QR your Admin gave you.
5. The app configures itself automatically.
6. Sign in with your email and password.

Detail: [Installing the app](#) · [Pairing and setup](#).

## 10–15 min — Set biometric unlock

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1. After first sign-in, the app prompts you to set a **4-digit PIN**.
2. Confirm.
3. When asked, enable **Face ID / fingerprint** if your device supports it.
4. Do a quick test: close the app, reopen, unlock with biometric.

You're now set for the rest of your shift — no need to re-enter your password every time.

Detail: [Biometric unlock](#).

## 15–30 min — Tour the app

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Tap through these four screens to understand the layout:

1. **Dashboard** — today's task count, overdue count, pending uploads. This is where you land when you open the app.

2. **Tasks** — your list of assigned tasks, grouped by due time.
3. **Hierarchy** — the asset tree. Drill down to see where things are.
4. **Settings** — profile, language, notifications, force-sync.

Find the **scan icon** (top of the main screens). You'll use it to scan NFC tags on equipment.

## 30–50 min — Execute your first task

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If you have an assigned task ready:

1. Tap **Tasks**.
2. Tap any assigned task.
3. Tap **Start**.
4. Acknowledge any safety steps (read them — they exist for a reason).
5. Fill the form fields.
6. Tap the camera icon to attach a photo of the work area.
7. Tap **Submit**.
8. Confirm the task moves to **Pending approval** (or **Completed** if your company doesn't require approval).

If you don't have an assigned task yet, ask your Supervisor to assign one as practice. Or practice scanning NFC tags — they're harmless to scan repeatedly.

Detail: [Executing a task](#).

## 50–60 min — What to do when things go wrong

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Before your shift starts, skim these:

- **Working offline** — what happens without signal.
- **Sync and connectivity** — where your data goes.
- **Submit a repair request** — when you find something broken.
- **Report a shutdown** — when a line stops.

Bookmark the [Technician handbook](#) — it's your reference for everything beyond this first hour.

## Daily rhythm (forward reference)

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From day two onwards, a typical day looks like:

1. Unlock → Dashboard → scan the day's task count.
2. Tap **Tasks**, pick the top task, walk to the asset.
3. Scan NFC (or barcode) to open the task directly.
4. Execute → submit → next task.
5. End-of-shift check: **Pending uploads = 0**.

## Troubleshooting — the top 3

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1. **Can't sign in** — [I can't log in](#).
2. **Pending uploads won't clear** — [Sync is stuck](#).
3. **NFC not reading** — [NFC is not working](#).

You're set. Welcome to the team.

# First hour — Mapper

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A 60-minute quick start. You'll sign in, tour the key pages, and configure one production site to anchor the rest of your setup work.

## WHAT YOU NEED BEFORE YOU START

- An account with the **Mapper** role.
- Access to the browser-based web portal.
- Access to the mobile app for NFC tag writing (optional this hour).
- Rough knowledge of the physical plant: sites, lines, assets.

## 0–10 min — Sign in and orient

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1. Open `https://portal.<your-installation>.sm-tm.app`.
2. Sign in.
3. Note the sidebar sections: **Main** (Dashboard / Mapping / NFC Tags / Remarks / Products & Tools), **Task Planning**, **Feedback Management**, **Report**, **Configuration**.
4. Click **Mapping** — you land on the **Web Mapping** page with production-site cards. This is your home base.

Detail: [Navigating the portal](#).

## 10–25 min — Decide your naming convention

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Before you create anything, decide how you'll name nodes. You only get this right once per installation.

- **Production Sites** — short, stable. "Bandung Plant", "Medan Plant". Not "Main Factory" (ambiguous).
- **Lines** — numbered or sequenced. "Weaving Line 03" beats "Line Three". Pad with zeros.
- **Sections** — zone-based: "Operator side", "Drive side", "Section A".
- **Assets** — equipment tag or serial: "Loom L-314". Not "that pump near the door".
- **Task Points** — specific location: "Main bearing grease point", not "grease point".

Write the rules down. You'll thank yourself when you have 500 assets.

## 25–45 min — Create your first production site end-to-end

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Do the whole tree for one pilot site. This validates your convention before you scale.

1. **Mapping** → **Add Production Site**. Name it, save.
2. Open the site → **Add Line**. Name it, save.
3. Open the line → optionally **Add Section**.
4. Open the section (or line) → **Add Asset**. If a matching component exists in [Components](#), link it; the component's default tasks come with the asset.
5. Open the asset → **Add Task Point** for each inspection / lubrication point.
6. Optionally write an NFC tag to each task point using the mobile app.

Detail: [Mapping](#) · [Writing NFC tags](#).

## 45–55 min — Check the supporting data

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Your hierarchy plugs into existing reference data. Confirm these are set up:

- **Components** — the reusable equipment types your assets link to.
- **Asset Setup → Units** — the measurement units your tasks will use (°C, bar, l, etc.).
- **Asset Setup → Thresholds** — min/max ranges for numeric fields.
- **Safety Standards** — the acknowledgement checklists that gate risky tasks.

If any of these are empty or wrong, talk to the Admin — they typically set these up first, but mappers often end up owning the content.

## 55–60 min — Plan your next sessions

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A mapper's job is multi-week, not one-hour. Set realistic expectations:

- **Week 1:** pilot one site (what you just did). Get feedback from a technician.
- **Weeks 2–4:** scale to other sites. Import via CSV where possible — see [Mapping > Bulk import](#).
- **Month 2+:** iterate on task definitions as technicians report friction.

Bookmark the [Mapper handbook](#) for reference.

## Top 3 mapper pitfalls

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1. **Building the whole plant before testing.** Pilot one site; get feedback; then scale.
2. **Inconsistent naming.** Decide the convention first, stick to it, resist drift.

3. **Safety procedures too generic.** "Check safety" is theatre. Specific steps are safety.

Welcome.

# First hour — Supervisor

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A 60-minute quick start. You'll sign in, assign one task, approve one (if approval is on), and set up your daily rhythm.

## WHAT YOU NEED BEFORE YOU START

- An account with the **Supervisor** role.
- At least one line with at least one technician on your shift.
- At least one task in the unassigned pool (ask your Mapper if empty).

## 0–5 min — Sign in and land on the Dashboard

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1. Open `https://portal.<your-installation>.sm-tm.app`.
2. Sign in.
3. The Dashboard opens. Glance at the seven indicator cards: **Overdue Tasks**, **Unassigned Tasks**, **Repair Requests**, **Remarks**, **Notes**, **Alerts**, **NFC Skipped**.

If **Unassigned Tasks > 0**, you've got work to distribute. If **Pending approval** is non-zero, you've got submissions to review.

## 5–20 min — Distribute the day's work

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1. Sidebar → **Task Planning** → **Assign Task**.
2. Filter at the top: pick your **Production Site**, optionally narrow to one **Line** or **Task Type**.
3. Expand the task tree on the left to see unassigned task points.
4. **Tick the tasks** you want to assign (parent node ticks everything underneath).
5. On the right, **tick the technician(s)** who should do the work.
6. Click **Assign**.

The assign / unassign workflow is checkbox + button — no drag-drop. If you tick more than one technician, the behaviour depends on a company flag (see [Assign Task](#)).

Detail: [Assign Task](#).

## 20–35 min — Review one submitted task

---

If approvals are enabled in your company:

1. Sidebar → **Feedback Management** → **Task Approvals**.
2. If the queue is empty, wait a technician out, or ask one to submit a practice task.
3. Click any pending submission.
4. Scan:
  - Are the measurements plausible?
  - Are any values threshold-highlighted red?
  - Are photos present and usable?
  - Were safety steps acknowledged genuinely (not all tapped in 2 seconds)?
5. Click **Approve** or **Reject with reason**.

If your company has approval **disabled** (check [Company Setting](#) → [Task Approval](#)), the queue stays empty — technicians' submissions auto-complete. Skip this step.

Detail: [Task Approvals](#).

## 35–45 min — Tour the planning views

---

Open these three pages as tabs:

- **Daily Planning** — calendar of all scheduled tasks. Use to scan the week.
- **Daily Workload Navigator** — where in the plant today's work is.
- **Workload Range** — per-technician load across a date range.

Each answers a different question. You'll keep all three open during busy weeks.

## 45–55 min — Handle incidents if any arrived

---

- **Repair requests** in the Dashboard's counter — click through to triage.
- **Shutdown reports** — see [Shutdowns](#). Flag urgent ones; acknowledge planned ones.

Priority rule of thumb:

- **Critical** → act now, interrupt whatever you're doing.
- **High** → this shift.
- **Medium** → this week.
- **Low** → next planned maintenance window.

## 55–60 min — Bookmark your daily rhythm

---

From tomorrow onwards:

Time	Action
Start of shift	Dashboard → overdue count, open approvals
First 30 min	Assign Task → distribute the day's new work
During shift	Approve submissions as they come in
Ad-hoc	Triage repair requests and shutdowns in real time
End of shift	Clear approval queue, note carry-overs

Bookmark the [Supervisor handbook](#) for reference.

### Top 3 supervisor pitfalls

---

- 1. Assigning everything to the same reliable technician.** They burn out. Use the workload badge to balance.
- 2. Letting approvals pile up.** Aim for < 1 hour from submission to resolution.
- 3. Rejecting without specifics.** "Photo unusable" gets ignored; "photo too dark, please retake with flash" lands.

Welcome.

# First hour — Admin

---

A 60-minute quick start for a new-installation Admin. You'll verify your tenant, review company settings, create the first user, and set expectations for the follow-up work.

## WHAT YOU NEED BEFORE YOU START

- An account with the **Admin** role.
- Your company's portal URL.
- A rough idea of who's on the team that needs access.

## 0–5 min — Sign in and confirm tenant

---

1. Open `https://portal.<your-installation>.sm-tm.app`.
2. Sign in.
3. Click your avatar (top-right) → confirm the company name shown is correct.

If you see a different company than expected, stop and contact Pegotec — the tenant may be misconfigured.

## 5–20 min — Walk through Company Setting

---

Sidebar → **Configuration** → **Company Setting**. This page has nine sections on one scrolling page. Walk each quickly:

1. **Company Information** — name, industry, timezone, address. Fill it in if blank.
2. **Contact Information** — your contact person, email, phone.
3. **Application Settings** — grace periods, NFC Required, QR scanning, Max tasks per technician, Min app version, Clock drift, Completion target. Defaults are sensible; don't change unless you know what you're doing.
4. **Features** — Multi-Technician Assignment toggle. Default off.
5. **Scheduling & Sync** — Schedule horizon (default 90 days), sync windows. Leave for now.
6. **Task Escalation** — default off. Turn on later once you have a real workflow.
7. **Access Control** — "Restrict Mappers to Assigned Production Sites" toggle. Default off.
8. **Task Approval** — "Require Supervisor Approval for Task Completion" toggle. Decide now whether you want an approval step.
9. **Save Settings** if you changed anything.

Detail: [Company Setting](#).

## 20–30 min — Invite the Mapper first

---

The Mapper sets up the hierarchy, which everything else depends on. They must be first.

1. Sidebar → **Configuration** → **User Setting** → **User List**.
2. **New User**.
3. Fill in name, email, username.
4. Check **Send password reset email** so the Mapper sets their own password.
5. Assign the **Mapper** role.
6. Save.

The Mapper receives an email and can start immediately. Detail: [User management](#).

## 30–40 min — Skim master data

---

Master data is pre-seeded but almost always needs tailoring:

- **Units** — do they match what your plant uses?
- **Thresholds** — start loose; tighten from real data.
- **Products** — replace placeholders with your actual lubrication catalogue.
- **Tools** — your tool registry.
- **Repair Request Types** — failure categories.
- **Shutdown Reasons** — shutdown-cause taxonomy.

Don't fix it all today. Skim now, plan a review session with the Mapper next week.

## 40–50 min — Invite the rest of the team

---

Create users for:

- **Supervisors** — will assign work and approve.
- **Technicians** — will execute tasks in the field.
- **Manager(s)** — will read reports.
- **Viewer(s)** — auditors / compliance.

Bulk-import via CSV if you have > 20 users: [User management > Import users from CSV](#).

## 50–55 min — Set up mobile pairing

---

Sidebar → **Configuration** → **User Setting** → **Mobile Setup (QR)**. Display or print the QR. Field devices pair by scanning it.

Detail: [Mobile Setup](#).

## 55–60 min — Plan the first two weeks

---

You can't finish setup in an hour. Set a realistic runway:

Week	Action
Week 1	Mapper builds one pilot production site end-to-end. You review it together.
Week 2	Scale to remaining sites, refine master data based on real use.
Week 3	Train Supervisors on <a href="#">Assign Task</a> . Train Technicians on the <a href="#">mobile app</a> .
Week 4+	Tune notifications, thresholds, and schedules as real data accumulates.

Bookmark the [Admin handbook](#) for reference.

## Top 3 admin pitfalls

---

- 1. Trying to finish setup in one session.** It's a multi-week effort. Pace yourself.
- 2. Leaving approval on by default without understanding it.** If your team hasn't discussed approval, default off and turn on deliberately later.
- 3. Not training supervisors on the Assign Task checkbox workflow.** It's checkbox + button, not drag-drop. Multi-tech behaviour depends on a flag. Show them.

Welcome.

## Cards (print)

---

# Quick-reference cards

---

One-page, print-ready cards for each role. Post them on bulletin boards, laminate them, hand them out at training.

## Available cards

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- **Technician card** — pocket-reference for field execution.
- **Mapper card** — hierarchy + tag commissioning cheat-sheet.
- **Supervisor card** — daily rhythm and escalation thresholds.
- **Admin card** — master-data + user-management checklist.

## Print

---

Open any card in your browser, then **File** → **Print**. Each card is designed to fit on a single A4 page at default print margins.

To print every card as one booklet, open **Printable handbook** (generated by the site's print-site plugin) — it contains the whole handbook linearly.

## Typical uses

---

- **Shop-floor noticeboard** — technician card visible at the tool check-out.
- **Training sessions** — hand out the relevant role card at the start.
- **Device on-boarding** — attach the technician card to each newly-issued phone / tablet.
- **Audit visit** — hand the auditor a Viewer-style summary (not a card; see the [Viewer handbook](#)).

# Technician — quick reference

A one-page pocket reference for field work. Print and post.

## Your daily rhythm

1. Unlock phone → open the app.
2. Dashboard → check overdue count and pending uploads.
3. Tap **Tasks**, or scan an NFC tag at the asset.
4. **Start** → acknowledge safety → fill form → photo → **Submit**.
5. Next task.
6. End-of-shift: confirm **Pending uploads = 0**.

## Icons at a glance

Icon	Meaning
	Due today or later
	Due soon
	Overdue
	Draft (not submitted)
	Completed / approved
	Rejected — needs rework

## Task types

Electrical · Lubrication · Mechanical · Production · Repair request

## Scan shortcuts

- **NFC tag**: tap the scan icon → hold phone back to the tag → the task opens.
- **Barcode / QR**: scan icon → camera tab → frame the code.

- Antenna locations: most Androids — upper back; iPhone — top edge.

## When things happen

Situation	Action
Equipment broken but line still runs	<b>Repair request</b>
Line stopped / safety engaged	<b>Shutdown report</b>
Technician finds a problem mid-task	Finish task (if safe) → raise repair request
Phone offline	Keep working — app queues, syncs later
Pending uploads > 0 at shift end	Move to Wi-Fi, wait 1 min, re-check

## Top 3 troubleshooting

1. **Can't sign in** → wait 2 h if locked (10 failed attempts). Reset via **Forgot password?**.
2. **Sync won't clear** → pull-to-refresh on Dashboard, then **Settings** → **Force sync**.
3. **NFC not reading** → enable NFC in phone settings; remove thick case; hold 1–2 seconds.

## Safety

- Never tap through acknowledgement steps in 2 seconds. Read them.
- Photos are proof-of-work. Take them clearly.
- If you're unsure about a task, ask before doing.

## Contact

Email support (via your Admin): [info@pegotec.net](mailto:info@pegotec.net) · business hours only.

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# Mapper — quick reference

A one-page reference for hierarchy building and tag commissioning.

## The five-level hierarchy



Production Site → Line → Section → Asset → Task Point

Tasks, NFC tags, schedules all attach at **Task Point** level.

## Naming rules

- **Consistent** — Line 01 not Line 1 / Line One.
- **Short** — fits mobile screens.
- **Searchable** — unique enough that 3 characters narrow results.

Decide once. Stick to it. Resist drift.

## Task types and when to use each

Type	Use
Lubrication	Grease / oil application
Mechanical	Inspection, adjustment, cleaning (default for routine)
Electrical	Voltage / current / insulation checks
Production	Output / run-hour readings
Repair request	Resolving a reported fault

## Component vs asset

---

- **Component-level tasks** — one definition applies to every asset of that component type. Use when  $\geq 3$  similar assets exist.
- **Asset-level tasks** — one-off / outlier equipment only.

## NFC tag workflow

---

1. Open task point in mobile app.
2. **Write NFC tag** → hold blank tag against phone.
3. Apply physically to the asset.
4. Test-scan. Move on.

**Tag choice:** NTAG213 minimum, enclosed / on-metal for ferrous surfaces. Budget ~\$0.50 / tag.

## Safety procedures

---

- **3–8 steps** per procedure. Specific imperatives ("Verify LOTO on main disconnect").
- Attach only to tasks where risk justifies it.
- Co-author with your safety officer.

## Master data checklist

---

Before executing real tasks, confirm these are populated:

- Units
- Thresholds (loose initially; tighten later)
- Products
- Tools
- Repair request types
- Shutdown reasons

## Anti-patterns

---

1. **Building the whole plant before testing.** Pilot one site; get feedback; then scale.
2. **Inconsistent naming.** Decide first, stick.
3. **Generic safety** ("check safety is OK"). Be specific or don't bother.

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# Supervisor — quick reference

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A one-page reference for daily coordination and escalation.

---

## Your daily rhythm

---

Time	Action
Start of shift	Dashboard → overdue / open approvals / repair requests
First 30 min	Assign Task → distribute new work
Through shift	Approve submissions as they land (< 1 h turnaround)
Ad-hoc	Triage repair requests and shutdown reports
End of shift	Clear approval queue, note carry-overs

## Assign Task workflow

---

1. **Task Planning** → **Assign Task**.
2. Filter by Production Site / Line / Task Type.
3. **Tick** tasks on the left tree.
4. **Tick** one or more technicians on the right.
5. Click **Assign**.

Multi-select behaviour depends on the **Multi-Technician Assignment** flag (Company Setting).  
Default off → round-robin split.

## Approve / reject

---

If approval is enabled:

- **Approve** — values plausible, photos clear, safety acknowledgements genuine.
- **Reject with reason** — always specific: "Photo too dark, retake with flash."

Never bulk-approve entire shifts blind.

## Priority guide (repair requests & shutdowns)

Priority	Response
Critical	Act now. Line-stop or safety.
High	This shift.
Medium	This week.
Low	Next planned window.

Don't over-use Critical. If everything's critical, nothing is.

## Three views to open in tabs

1. **Daily Planning** — calendar of week's work.
2. **Daily Workload Navigator** — where today's work sits.
3. **Workload Range** — per-technician load.

## Anti-patterns

1. **Assigning everything to one reliable tech.** They burn out; team doesn't grow.
2. **Approving without looking.** Erodes data quality.
3. **Ignoring repair-request backlog.** Old open requests rot.

## Reports you'll open most

- Completion Report (daily / weekly "are we on plan?")
- Technician Comparison (monthly coaching)
- Repair Request Report (asset patterns)

## Contact

Escalation path: your **Admin** first, then Pegotec ( [info@pegotec.net](mailto:info@pegotec.net) , business hours).

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# Admin — quick reference

A one-page reference for tenant administration.

## Initial-setup sequence

1. **Company Setting** — name, timezone, logo, contact info.
2. Invite the **Mapper** (they build the hierarchy everyone depends on).
3. Review master data: **Units** → **Thresholds** → **Products** → **Tools** → **Repair Request Types** → **Shutdown Reasons**.
4. Configure **Safety Standards** with the safety officer.
5. Invite **Supervisors, Managers, Technicians, Viewers**.
6. Generate the **Mobile Setup (QR)** code; distribute for device pairing.
7. Optional: configure **Webhooks** for integrations.
8. Optional: turn on **Task Escalation** (default off).

## Company-wide switches worth understanding

Setting	Default	Effect
Task Approval	<b>Off</b>	On = supervisor must approve every submission
Multi-Technician Assignment	<b>Off</b>	On = one task to many technicians
Automatic Escalation	<b>Off</b>	On = Tier 1 notifies supervisors after N hours overdue
Restrict Mappers to Assigned Sites	<b>Off</b>	On = mappers see only their production sites
NFC Required	Varies	On = mobile forces NFC scan before task execution

## Grace periods

Tasks become overdue **after** the configured grace window:

- Daily tasks → hours after due
- Weekly tasks → days after due
- Monthly tasks → days after due

Wider grace = fewer false overdues. Narrower = tighter operations. Find your comfort in weeks 2–4.

## Weekly / monthly maintenance

Frequency	Action
Daily	Activity log quick scan
Weekly	Approval-queue review, repair-request trends
Monthly	User roster reconcile, notification preference audit
Quarterly	Master-data cleanup, threshold values vs actual distribution
Annually	Physical NFC-tag walk, safety-procedure review with safety officer

## Tenant isolation — non-negotiable

- Every role except PegotecUser sees **only their own company's data**.
- Exports are scoped to the current company.
- Audit log is per-tenant.

If you need cross-company data, a Pegotec support case is the only path.

## User management essentials

- Create users with **Send password reset email** ticked.
- Prefer **Deactivate** over **Delete** (audit trail).
- Never delete the last Admin.
- CSV import for bulk (> 20 users).

## Contact

Second-line support: [info@pegotec.net](mailto:info@pegotec.net) · business hours · mark URGENT for production-stopping issues.

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# User guide

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# User guide

---

The user guide is the main reference for day-to-day use of Smart Maintenance Task Manager. It's organised two ways so you can pick the entry point that matches how you're reading.

## Two ways in

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### By role

Start here if you're learning the platform, onboarding a new colleague, or want a complete tour of everything your role can do.

- [Technician](#)
- [Mapper](#)
- [Supervisor](#)
- [Manager](#)
- [Admin](#)
- [Viewer](#)
- [PegotecUser](#)

### By app

Jump straight to a specific feature or screen when you're already working inside an app.

- [Web portal](#) — admin portal in your browser.
- [Mobile app](#) — field app for iOS and Android.

## How pages are structured

---

Every how-to page follows the same template:

1. **One-sentence description** of what the page helps you accomplish.
2. **Required role** — who can do this.
3. **Overview** — a paragraph of context.
4. **Prerequisites** — what needs to be true before you start.
5. **Steps** — the numbered procedure.
6. **Result** — what you should see when you're done.

## 7. **Related topics** — where to go next.

If a screenshot is missing, you'll see a `Screenshot needed` admonition describing exactly what to capture — contributions welcome. Grep for `Screenshot needed` to audit remaining gaps.

## By role

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# Technician handbook

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Everything a field technician needs to know to use Smart Maintenance Task Manager day to day.

## THIS HANDBOOK IS FOR THE TECHNICIAN ROLE

If you're not sure what role you have, open your profile in the mobile app (**Settings** → **Profile**) or ask your Supervisor.

## What you'll do with the platform

---

As a technician, the platform replaces paper checklists and radio calls with a structured, trackable digital workflow:

- **Receive assignments** — your Supervisor (or the schedule) pushes tasks to your device.
- **Execute tasks** — walk the asset, follow the prompts, capture measurements and photos, acknowledge safety steps.
- **Flag problems** — submit repair requests when something's broken, or shutdown reports when a safety threshold is crossed.
- **Finish your shift** — hand back a complete, signed digital record of everything you did.

Everything works **offline**. You can walk the entire plant without a signal and the app syncs when you're back in range.

## Your primary app

---

The **mobile app** is where you spend 95% of your time. A minimal dashboard in the web portal lets you review your own completed work on a larger screen, but you don't need it day to day.

## Your daily workflow






---

### 1. Start your shift

1. Unlock your device.
2. Open the app — use Face ID, Fingerprint, or the 4-digit PIN you set during onboarding.
3. The **Dashboard** shows: today's task count, overdue items, pending uploads (if any), and your current sync status.

## 2. Check your list

Tap **Tasks**. You see every task assigned to you, grouped by due date and priority. Icons at the right of each row tell you:

-  Due today or later.
-  Due soon.
-  Overdue.
-  Draft (started but not yet submitted).
-  Completed.

See [Icons and badges](#) for the full set.

## 3. Pick a task and execute it

Tap the task. A summary screen shows the asset, the task type, any safety prerequisites, and the form fields you'll need to fill in. When you're ready, tap **Start**.

If the task requires safety acknowledgement, you'll see those steps first and must tap **Acknowledge** before the form loads.

The form itself is **dynamic** — it adapts to the task type (lubrication, maintenance, electrical, production, repair). Fields might include:

- Numeric measurements (pressure, temperature, running hours).
- Dropdown selections (condition: good / fair / poor).
- Yes/No checks.
- Photo captures (tap the camera icon).
- Free-text notes.

The full walkthrough — including offline saves, photo capture, and submitting — is on [Executing a task \(mobile\)](#).

## 4. Scan NFC or barcodes to jump to an asset

Physical equipment in the plant has NFC tags (or barcodes on older sites). Tap the scan icon in the toolbar, hold the phone to the tag, and the app opens the matching task point instantly — no tree navigation needed.

See [Scanning NFC tags](#) and [Scanning barcodes](#).

## 5. Submit repair requests when something's wrong

If you find a problem — broken seal, loose cable, oil leak — don't just make a note and move on. Tap **Repair request** from any task screen (or the main menu).

Fill in:

- **Asset** (pre-filled if you came from a task).
- **Failure type** (dropdown from the master list).
- **Description** (free text).
- **Priority** (low / medium / high / critical).
- **Photos** (at least one is strongly recommended).

Submit, and it goes into the queue for your Supervisor and Admin to triage.

See [Repair requests](#).

## 6. Report shutdowns

If an asset trips, a line halts, or a safety system engages, open the task or asset and tap **Report shutdown**. Fill in the reason, start time, end time (if known), and affected equipment. Submit.

Shutdown reports are visible to Supervisors in real time. See [Reporting a shutdown](#).

## 7. End of shift

Before you put the device down:

1. Pull down on the Dashboard to refresh.
2. Look at **Pending uploads** — it should read .
3. If it's not zero, you probably have no connectivity. Move to Wi-Fi or a signal area and wait a minute. The app syncs automatically.
4. Tap your avatar → **Sign out** (optional; the session remains valid even if you don't).

## Working offline

---

The platform is **offline-first** for technicians. When the app can't reach the server:

- You can still open any task assigned to you.
- You can still execute and complete tasks.
- Your work is saved as a **draft** on the device.
- The badge on the Dashboard shows **Pending uploads: N**.

- As soon as connectivity returns, drafts upload automatically in the background (every 15 minutes) or immediately if the app is open and you have signal.

Photos are queued separately — they may take longer to upload than the task form itself.

See [Working offline](#) and [Sync and connectivity](#) for the full mechanics.

## Safety procedures

---

Some tasks are **safety-gated**. You'll see a list of acknowledgement steps (for example: "Verify lock-out tag is present", "Confirm PPE is worn") before the form opens. You **must tap Acknowledge** on each step to proceed.

Your acknowledgements are timestamped and stored with the task record. Don't tap through without reading — your Supervisor can see if a task was acknowledged but the work looks rushed.

## Photos and attachments

---

Photos are essential for:

- Proof-of-work (before/after shots).
- Evidence in repair requests and shutdown reports.
- Documenting condition findings.

The app:

- Compresses photos on the device before upload.
- Uploads in the background.
- Generates thumbnails automatically — Supervisors can scroll large galleries quickly.

Supported formats: JPEG, PNG. Maximum 10 photos per task, 10 MB per photo.

See [Photos and attachments](#).

## Notifications

---

You receive push notifications for:

- **New task assigned** — immediately, if the app is backgrounded or closed.
- **Task due soon** — one hour before the due time.
- **Task overdue** — 15 minutes after the due time.
- **Repair request update** — when your supervisor acts on one of your requests.

Manage notifications in **Settings → Notifications**.

See [Notifications \(mobile\)](#).

## What you can't do

---

As a technician, the platform intentionally limits some actions so you can focus on execution:

- You can't create, edit, or delete assets or task points. (Mappers do that.)
- You can't assign tasks to anyone else. (Supervisors do that.)
- You can't approve or reject completed tasks. (Supervisors and Admins do that.)
- You can't see other technicians' detailed task data — your dashboard shows only your own work.
- You don't have access to company-wide reports (that's the Manager / Supervisor view).

If you need something that isn't in your scope, ask your Supervisor.

## Troubleshooting

---

Common issues and where to fix them:

Problem	See
Can't sign in	<a href="#">I can't log in</a>
Tasks I expect aren't showing	<a href="#">Tasks aren't showing</a>
Pending uploads won't clear	<a href="#">Sync is stuck or failing</a>
NFC isn't reading tags	<a href="#">NFC is not working</a>
Photo upload keeps failing	<a href="#">Photo upload is failing</a>
App crashes on open	<a href="#">The app is crashing</a>

## Related topics

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- [Installing the mobile app](#)
- [Pairing and setup](#)
- [Executing a task \(mobile\)](#)
- [Permissions matrix](#)
- [Task types](#)

# Mapper handbook

Everything a mapper needs to know to build and maintain the data model that powers Smart Maintenance Task Manager.

## THIS HANDBOOK IS FOR THE MAPPER ROLE

If you're not sure what role you have, open your profile in the web portal (avatar → **Profile**) or ask your Admin.

## What you'll do with the platform

As a mapper, you're the authoring layer of the whole platform. Every asset that gets inspected, every task that gets executed, and every NFC tag that a technician scans — you put those in place first. Nothing else works until the hierarchy and tasks are defined.

Your main responsibilities:

- **Build the asset hierarchy** — Production Sites, Lines, Sections, Assets, Task Points.
- **Define tasks** and link them to the right task points.
- **Write NFC tags** on physical equipment so technicians can scan them.
- **Configure components** (pumps, motors, drills) and their options (units, thresholds, text types).
- **Maintain safety procedures** — the acknowledgement steps that gate certain tasks.
- **Maintain master data** — units, products, tools that your tasks reference.
- **Manage users inside your company** (this is often shared with Admins).

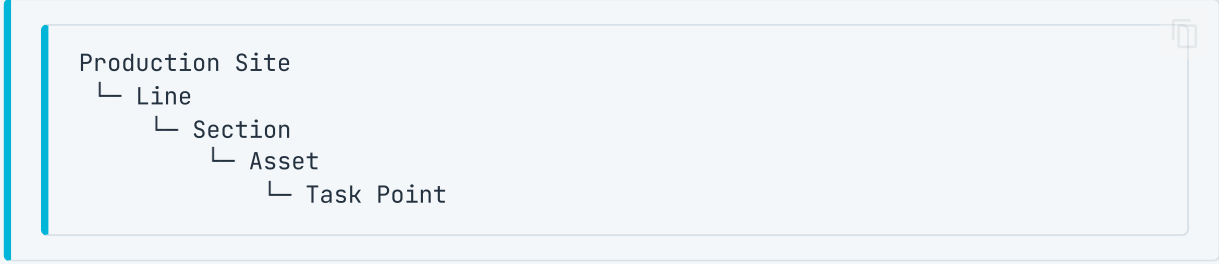
## Your primary app

Mappers split their time between two apps:

App	When you use it
<b>Web portal</b>	Bulk editing, CSV imports, long editing sessions at a desk, reviewing structures across the whole site.
<b>Mobile app</b>	Any time you need to <b>write NFC tags</b> (mobile-only), on-site edits where having the equipment in front of you helps, adding photos while you're at the asset.

## The asset hierarchy (the mental model)

The entire platform hangs off a five-level tree:



```

Production Site
├── Line
│   ├── Section
│   │   ├── Asset
│   │   └── Task Point

```

Every task is attached to a **Task Point**. Every NFC tag points to a **Task Point**. Every scheduled inspection operates on a **Task Point**. If you don't model the task point, none of it happens.

Rules of thumb:

- A **Production Site** is a physical building, factory, or plant.
- A **Line** is a production line inside the site — the natural split when work is organised by product flow.
- A **Section** is a subdivision within a line (drive side, motor side, left bank, right bank). Use sections when one line has obviously distinct zones.
- An **Asset** is a piece of equipment: pump P-302, motor M-14, compressor C-1.
- A **Task Point** is the specific spot on the asset where work happens: grease point 3, bearing housing, temperature probe. One asset typically has many task points.

Plan the tree before you build it. It's much harder to restructure later than to get it right the first time.

## Your first week as mapper

### 1. Learn the plant before you touch the system

Walk the site. Make notes. Take photos. Ask the maintenance team how they already think about their equipment — if they've been working there for years, their mental model is probably close to what the platform should reflect.

### 2. Decide the naming convention

Pick a convention and stick to it:

- **Consistent** — `Line 01`, `Line 02` (not `Line 1`, `Line Two`, `Production Line B`).
- **Short** — names appear on mobile screens where space is tight.
- **Searchable** — unique enough that search narrows quickly.

Renaming later is cheap but re-training your team isn't.

### 3. Build one Production Site end-to-end

Pick one site and model it completely — site, all its lines, a representative sample of sections, assets, task points. Get feedback from a supervisor and a technician. Adjust. Then copy the pattern to the other sites.

### 4. Write the first ten NFC tags

Put real tags on real equipment. Have a technician test-scan. Adjust tag placement (NFC antennas don't love metal — sometimes you need a plastic spacer) and confirm the right asset opens.

### 5. Seed safety procedures and master data

Pull your existing safety standards. Create procedures for the classes of work your technicians do. Seed the units and products you've already standardised on.

### 6. Open the first tasks to real work

Hand off to a supervisor, who assigns them to technicians. Watch what happens. Iterate.

## Building the asset hierarchy

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See [Asset hierarchy \(web portal\)](#) for the step-by-step. The quick summary:

#### Web portal

1. **Mapping** in the sidebar.
2. Create a Production Site → open it → create Lines → open each → create Sections → Assets → Task Points.
3. Bulk-import with CSV if you already have an asset register elsewhere.
4. Drag to reorder.

#### Mobile app

1. Open **Hierarchy** from the menu.
2. Tap the **+** button at the level you're at.
3. Fill in the form. Save.
4. For task points, optionally write an NFC tag immediately after saving.

## Creating tasks

---

A task is a definition of work to perform at a task point. Tasks are typed (lubrication / maintenance / electrical / production / repair) — see [Task types](#).

To create a task:

1. Navigate to the task point in the hierarchy.
2. Click **Add task**.
3. Pick the task type.
4. Configure the form fields the technician will see — numeric fields, dropdowns, photo requirements, thresholds.
5. (Optional) Link a safety procedure.
6. (Optional) Attach a recurring schedule.
7. Save.

You can define a task once and let the schedule generate instances automatically. You don't create a new task every day — you create it once and let the platform multiply it over time.

## Reusing tasks across similar assets

If a section has twenty similar pumps that all need the same weekly lubrication:

- Don't create twenty separate tasks by hand.
- Use the **Apply to siblings** option after creating the first task, or duplicate via CSV import.

## Writing NFC tags

---

NFC is the fastest way for a technician to open the right task point. The workflow:

1. In the mobile app, open the task point you want to link.
2. Tap **Write NFC tag**.
3. Hold a blank NFC tag against the phone's NFC antenna.
4. The app writes `NFC_TASKPOINT_<id>` to the tag.
5. Physically apply the tag to the asset.
6. Test-scan to verify.

### WHICH TAGS TO BUY

NTAG213 or better. Durable enclosed versions for industrial environments — plain stickers don't survive grease, steam, or wash-down.

**NFC ON METAL**

Metal surfaces detune NFC antennas. Use tags labelled "NFC on-metal" for equipment with ferrous housings, or attach a ~2mm plastic spacer between tag and metal.

For more, see [Writing NFC tags](#).

## Components

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A **component** is a reusable equipment-type definition: "centrifugal pump", "vertical mill spindle", "V-belt drive". You define the component once (with its options: unit, type, text\_type), then link assets to it. Tasks attach to components so that when you create an asset from that component, the task set comes with it.

Use components when:

- Several assets share the same maintenance profile (one definition applies to many assets).
- You want to standardise task fields across similar equipment.

Components live in **Components → Tree** on the web portal. See [Components \(web portal\)](#).

## Safety procedures

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Any task that has safety implications should have a **safety procedure** attached. When the technician starts the task, the procedure blocks the form until each measure is acknowledged.

A good safety procedure:

- Has numbered, specific steps ("Verify lock-out tag on main disconnect", not "Check electrical is safe").
- Is short enough to actually read (3–8 measures, not 40).
- Uses consistent verbs ("Verify", "Confirm", "Don") so acknowledgements feel distinct.

See [Safety procedures \(web portal\)](#).

## Master data

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The tables your tasks reference:

- **Units** — measurement units (bar, psi, °C, litres, hours) and their conversion factors.
- **Products** — lubrication and consumable products your team uses.
- **Tools** — the tool registry (wrench sizes, special fixtures).
- **Thresholds** — min/max acceptable values (pump discharge pressure, bearing temperature).

- **Repair request types** — the dropdown of failure categories.
- **Shutdown reasons** — the dropdown of shutdown causes.

Admins have permission to edit these, but as mapper you often own them in practice. See [Master data \(web portal\)](#).

## What you can do that other roles can't

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- Create / edit / delete anything in the hierarchy.
- Create / edit / delete tasks, components, schedules, safety procedures.
- Write NFC tags (mobile app only).
- Create hierarchy from the mobile app (supervisors and admins can view but not create on mobile).

For a full matrix, see [Permissions matrix](#).

## What you can't do

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- Approve or reject completed tasks (that's Supervisor / Admin).
- Change company-wide settings (Admin only).
- Manage companies or switch tenants (PegotecUser only).

## Day-to-day rhythm

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A mature mapper mostly maintains, not builds. A typical week:

- Respond to requests for new task points or tasks (when production adds equipment).
- Rename / reorganise as the plant's structure evolves.
- Replace damaged NFC tags.
- Adjust thresholds based on historical measurement data.
- Review the NFC skip report — high skip counts often mean a tag needs repositioning.
- Coordinate with supervisors on scheduling changes.

## Troubleshooting

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Common issues and where to fix them:

Problem	See
NFC tag scans but no task point opens	Check the tag was written correctly — <a href="#">NFC is not working</a>
Deleted an asset but tasks still show	Orphaned tasks linger briefly — refresh, or check the audit log
CSV import fails	Check headers match exactly, UTF-8 encoding — <a href="#">File formats</a>
Can't sign in	<a href="#">I can't log in</a>

## Related topics

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- [Configuration options \(reference\)](#) — cross-cutting setup decisions.
- [Asset hierarchy \(web portal\)](#)
- [Components \(web portal\)](#)
- [Safety procedures \(web portal\)](#)
- [Master data \(web portal\)](#)
- [Writing NFC tags \(mobile\)](#)
- [Creating hierarchy \(mobile\)](#)
- [Scheduling \(web portal\)](#)
- [Task types](#)
- [Permissions matrix](#)

# Supervisor handbook

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Everything a supervisor needs to know to coordinate maintenance crews using Smart Maintenance Task Manager.

## THIS HANDBOOK IS FOR THE SUPERVISOR ROLE

If you're not sure what role you have, open your profile in the web portal (avatar → **Profile**) or ask your Admin.

## What you'll do with the platform

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A supervisor is the routing layer between planning and execution. You look at what needs doing, decide who does it, watch as the work gets done, and quality-check the results.

Your main responsibilities:

- **Assign work** — distribute today's tasks across available technicians.
- **Monitor progress** — watch the dashboard for completion rates, delays, and bottlenecks.
- **Approve completions** — review submitted tasks and either sign them off or send them back.
- **Triage incoming events** — repair requests and shutdown reports hit your queue first.
- **Rebalance when plans change** — absences, breakdowns, priority shifts.
- **Coach from data** — use reports to identify patterns (high skip-scan counts, repeated rejections) and follow up with the team.

## Your primary app

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The **web portal**. Assignment and approval are much faster on a large screen; the drag-and-drop interface needs real screen real estate.

You have limited mobile access — you can scan NFC and barcodes from the mobile app to spot-check technicians in the field, but day-to-day supervision happens at a desk.

## The daily rhythm

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A typical supervisor shift:

## Start of shift — clear the board

1. Open the **Dashboard**. Check overnight completion rate, any overdue carry-overs, pending approvals, open repair requests.
2. Open **Assignments**. Look at today's unassigned task volume.
3. Check the **Approvals** queue — anything submitted overnight gets reviewed first, so technicians aren't blocked.
4. Review **Repair requests** and **Shutdowns** — anything urgent goes to the top of the pile.

## Mid-morning — assign the bulk of the work

See [Assigning tasks](#) for the full walkthrough. The quick version:

1. Filter the task tree to the site and line you're covering.
2. Drag tasks onto technicians.
3. Watch the workload badge next to each name — keep it roughly balanced.
4. High-priority tasks go to your most experienced technicians.

## Through the shift — approvals and reassignments

- Approvals come in continuously. Keep the queue short — technicians feel stuck when their submitted work sits uncleared.
- Reassign as circumstances change: sickness, breakdowns, new urgent work.
- Respond to repair requests and shutdown reports in real time.

## End of shift — wrap up

1. Clear the approvals queue so the incoming shift starts clean.
2. Review the **Completion Report** for today.
3. Note anything worth raising at the next handover (recurring issues, asset concerns, process friction).

## Assigning tasks

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This is the feature you'll use most. See [Assigning tasks \(web portal\)](#) — it's a complete walkthrough of the drag-and-drop interface.

Key patterns:

#### Morning bulk rollout

1. Filter by **Production site = (your site)**.
2. Expand all.
3. Drag entire lines onto technicians in proportion to experience and availability.

#### Single urgent task

1. Filter to the specific task type.
2. Drag directly onto the chosen technician.

#### Reassigning an absent technician

1. Click the technician's name.
2. Three-dot menu → **Reassign all**.
3. Pick replacement.

## Balance the load

The **workload badge** next to each technician tells you how many tasks they're currently carrying. Big imbalances mean poor throughput:

- Under-loaded technicians finish early and stand around.
- Over-loaded technicians rush and make mistakes.

Aim for rough parity, adjusted for experience. A veteran can carry more than a new hire — experience lets them work faster and self-dispatch when a task turns out to be a non-issue.

## Approving tasks

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When a technician submits a task, it enters your **Approvals** queue. See [Approving tasks \(web portal\)](#) for the workflow.

Your job when reviewing:

1. Check the form values — are the measurements plausible? Are values inside the configured thresholds? Threshold-highlighted values (red background) deserve a second look.
2. Check the photos — do they match the task description? Are they clear?
3. Check the safety acknowledgements — were they tapped through in seconds, or taken seriously?
4. Check the notes — if the technician flagged something, don't let the note get buried.

If the task is good, **Approve**.

If something's off, **Reject** with a clear reason. The technician sees the reason as a push notification and the task reopens in their list for rework.

## When to reject vs. when to accept-and-coach

Reject when:

- A measurement is missing or obviously wrong.
- Required photos are absent or unusable.
- A safety step is missing acknowledgement (the platform blocks this, so if it happens there's a real problem).

Accept-and-coach when:

- Photos are technically present but could be better.
- Notes are terse but the work is clearly done.
- A value is near-threshold but not outside it.

Rejecting too freely drains the team. Rejecting too rarely lets quality slip. Aim somewhere firm-but-fair.

## Handling repair requests

Technicians raise repair requests from the field when they find a problem. You see them in real time.

Priority guidance:

Priority	Response
<b>Critical</b>	Immediate action. Alert Admin, dispatch a qualified technician now, consider line stop.
<b>High</b>	Same shift. Dispatch before end of day.
<b>Medium</b>	This week. Schedule into a normal maintenance slot.
<b>Low</b>	Next planned maintenance window.

Don't let repair requests accumulate. Old open requests become forgotten open requests. If something's been sitting low-priority for two weeks, either bump it or close it.

See [Repair requests \(mobile\)](#) for the submitter's view.

## Handling shutdowns

A shutdown report means something stopped — a line, an asset, a safety system. You see them in real time with push notifications.

Shutdown triage:

1. Is the shutdown **planned** or **emergency**? The report form makes this explicit.
2. For emergencies, escalate immediately to whoever owns the asset class.
3. Record who's working on it and expected return time.
4. Close the shutdown when production resumes.

See [Shutdowns \(web portal\)](#).

## Reports you'll use

Your reporting focus is operational, not strategic — you want to know what's happening now and this week.

Report	When you'll use it
Dashboard	Every time you open the portal.
Task Reporting	Drill into individual task outcomes.
Completion Report	End of shift, end of week — are we on top of the plan?
Technician Comparison	When a coaching conversation comes up, or at performance review time.
Shutdown Report	When digging into recurring downtime patterns.
Repair Request Report	Spot assets that keep breaking.

Managers and Admins consume the strategic reports (OEE, Asset Availability, Yearly Report). See [Reports \(web portal\)](#).

## What you can do that other roles can't

- **Assign tasks** — Mappers and Admins can also assign, but it's the core of the Supervisor role.
- **Approve / reject tasks** — shared with Admins.

## What you can't do

- Create, edit, or delete hierarchy or tasks (Mapper / Admin).

- Change company-wide settings (Admin).
- Execute tasks on mobile (Technician / Mapper).
- Create or manage users and roles (Mapper / Admin).

See the [Permissions matrix](#) for the complete breakdown.

## Common patterns and anti-patterns

### Patterns that work

- **Assign early, adjust often.** Don't try to plan the whole shift in ten minutes at 7am. Distribute a first wave, then rebalance as the morning progresses.
- **Clear approvals fast.** Within an hour of submission is good. Anything past four hours feels unresponsive to the technician.
- **Reject with specifics.** "Photo is too dark, please retake with flash" lands better than "photo not usable".
- **Watch the badge.** The workload badge is your load balancer.

### Patterns that cause problems

- **Assigning every task to the same reliable technician.** They burn out, and the rest of the team doesn't grow.
- **Approving everything without looking.** Kills data quality and erodes trust over time.
- **Letting the repair request queue grow.** Old requests rot. Either act or close with a reason.
- **Ignoring the NFC skip report.** Repeated skips point to a training or tag-placement issue that compounds if unaddressed.

## Troubleshooting

Problem	See
Can't sign in	<a href="#">I can't log in</a>
Dashboard values look wrong	Check the date range filter — it persists across sessions
Assignment drop doesn't register	See <a href="#">Assigning tasks &gt; Things to watch for</a>
Tasks I assigned aren't reaching the technician	<a href="#">Tasks aren't showing</a>
Real-time updates lagging	<a href="#">Sync is stuck or failing</a>

## Related topics

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- [Assigning tasks \(web portal\)](#) — the drag-and-drop interface, in detail.
- [Approving tasks \(web portal\)](#)
- [Scheduling \(web portal\)](#)
- [Reports \(web portal\)](#)
- [Dashboard \(web portal\)](#)
- [Shutdowns \(web portal\)](#)
- [Permissions matrix](#)
- [Icons and badges](#)

# Manager handbook

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Everything a manager needs to use Smart Maintenance Task Manager for reporting, analysis, and decision-making.

## THIS HANDBOOK IS FOR THE MANAGER ROLE

If you're not sure what role you have, open your profile in the web portal (avatar → **Profile**) or ask your Admin.

## What you'll do with the platform

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As a manager, you consume reports. You don't create tasks, assign work, or edit data — that's the Mapper, Supervisor, and Admin's job. Your focus is the signal the system produces: are we running well? Where is effort going? Which assets are costing us the most?

Your main responsibilities:

- **Review dashboards** for a daily operational snapshot.
- **Export reports** for your own analysis or to share with stakeholders.
- **Monitor performance trends** over weeks and months.
- **Compare technicians, lines, or assets** to spot patterns.
- **Feed findings back to the Supervisor and Admin** for operational adjustments.

## Your primary app

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The **web portal**. Manager doesn't have mobile access — reports are where you spend your time, and reports are a desk activity.

## Your landing page: the Dashboard

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Every time you sign in, you arrive on the Dashboard. It shows:

- Today's task volume and completion rate.
- Overdue task count.
- Technician performance for the selected date range.
- Line availability and uptime indicators.
- Pending repair requests and shutdowns.

The date range picker at the top controls everything on the page. Start there — the default is usually "today", but most managerial questions are framed across a week, month, or quarter.

See [Dashboard](#).

## Reports available to you

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You have read-and-export access to every standard report. The ones you'll use most:

### Daily-to-weekly

- **Task Reporting** — raw execution log. Drill down to a specific task.
- **Task History** — search and filter across historical executions.
- **Completion Report** — completion rate by line, asset, technician.

### Monthly-to-quarterly

- **Technician Comparison** — performance ranking across the team.
- **Asset Availability** — uptime % and downtime analysis per asset.
- **Shutdown Report** — incidents by reason, duration, frequency.
- **Repair Request Report** — failure patterns and resolution times.

### Strategic

- **OEE Report** — Overall Equipment Effectiveness. Combines availability, performance, and quality.
- **Yearly Report** — annual aggregated metrics for exec / board review.

See [Reports \(web portal\)](#) for detail on each.

## Export and share

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Every report supports CSV and PDF export. Use:

- **CSV** — for your own analysis in Excel, Google Sheets, or a BI tool.
- **PDF** — for sharing with leadership or printing for meetings.

Exported files carry the filters you had set at the time. Re-exporting requires re-applying filters.

## Good managerial rhythms

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### Daily (5 minutes)

- Open the Dashboard.
- Glance at completion rate, overdue count, open repair requests.
- If anything's sharply off trend, message your Supervisor for context.

### Weekly (30 minutes)

- Completion Report for the past week — on or off schedule?
- Shutdown Report for the past week — any recurring causes?
- Repair Request Report — backlog growing or shrinking?

### Monthly (1–2 hours)

- Technician Comparison — any coaching opportunities?
- Asset Availability — which assets are dragging the site average down?
- OEE trend — up, flat, or down?
- Cross-reference with maintenance spend if your finance team shares it.

### Quarterly / Yearly

- Yearly Report for exec review.
- OEE year-over-year.
- Capital planning signals — assets with persistently high repair-request counts are candidates for replacement.

## Reading the reports well

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### Look for trends, not snapshots

A single bad day doesn't mean much. A month of sliding completion rate means you have a real problem. Always zoom out before drawing conclusions.

### Compare like with like

Line A's 92% completion rate and Line B's 78% completion rate might both be appropriate if Line B has harder equipment or more tasks per shift. Context matters more than raw numbers.

## Watch the shape of the data

Averages lie. A technician comparison that shows "team average is 95% on-time" can hide a range from 70% to 100%. Look at distributions, outliers, and leading indicators.

## Cross-reference reports

- Falling OEE + rising repair requests for the same asset → that asset is failing more often.
- High completion rate + rising shutdown frequency → tasks are being done but something else is wrong.
- Low completion rate + stable OEE → either tasks aren't driving availability as expected, or there's slack in the schedule.

## What you can do that other roles don't

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- Consume reports at scale without cluttering the system with writes.
- Unlike Supervisors, you have no approval obligation — your role is analytical only.

## What you can't do

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- Create, edit, or delete any data.
- Assign tasks.
- Approve or reject tasks.
- Access any mobile feature.
- Edit company settings.

For a full matrix, see [Permissions matrix](#).

## Things to watch for

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### PERSIST THE FILTER STATE

Filters carry across sessions. If a report looks empty when you come back to it, check the filters first — a leftover date range or site filter is usually the cause.

### DON'T PUBLISH SNAPSHOTS WITHOUT NOTING THE FILTER STATE

Exporting a PDF with a specific date range and sending it upward without context is an easy way to mislead. Always include the date range on the cover.

## NUMBERS LAG REAL EVENTS

Reports reflect the data that has been submitted and approved. If there's a big approval backlog, the Completion Report understates today's actual completions. Check the approval queue depth if numbers feel wrong.

## Common managerial questions and where to answer them

Question	Report
Are we keeping up with the plan?	Completion Report
Who on the team is struggling?	Technician Comparison
Which assets cost us the most effort?	Repair Request Report + Asset Availability
Are we getting faster / slower at resolving failures?	Repair Request Report (time-to-resolution over time)
What's our overall efficiency trajectory?	OEE Report
How much unplanned downtime do we have?	Shutdown Report + Asset Availability
Where should capital go next year?	Yearly Report + Repair Request Report by asset

## Troubleshooting

Problem	See
Report is slow to load	<a href="#">Performance is slow</a>
Numbers look wrong	Check filters; check the approval queue; check the date range covers what you expect
Can't sign in	<a href="#">I can't log in</a>

## Related topics

- [Dashboard \(web portal\)](#)
- [Reports \(web portal\)](#)
- [Navigating the portal](#)
- [File formats](#) — export formats.
- [Permissions matrix](#)

# Admin handbook

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Everything a company Admin needs to run Smart Maintenance Task Manager for their organisation.

## THIS HANDBOOK IS FOR THE ADMIN ROLE

If you're not sure what role you have, open your profile in the web portal (avatar → **Profile**) or ask Pegotec support.

## What you'll do with the platform

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As an Admin, you own your company's tenant. You control who has access, what they can do, and the master data that everyone else depends on. You're the first escalation point for everyone else in your company, and the interface to Pegotec support.

Your main responsibilities:

- **Manage users and roles** — create accounts, assign roles, reset passwords, deactivate leavers.
- **Configure company settings** — name, logo, timezone, notification preferences, feature flags.
- **Maintain master data** — thresholds, units, products, tools, repair-request types, shutdown reasons.
- **Approve tasks** — shared with Supervisors, but ultimately your authority.
- **Manage NFC tag lifecycle** — register, deactivate, audit.
- **Set up integrations** — webhooks, email configuration, mobile pairing codes.
- **Monitor the audit log** — for compliance, incident investigation, and spotting misuse.
- **Coordinate with Pegotec support** for platform-level issues.

## Your primary app

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The **web portal**. Admins can also execute tasks on mobile if they want to, but almost all admin work happens in the browser.

## Initial setup checklist

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If you're setting up a brand-new installation, work through this order. Each step unblocks the next.

## 1. Confirm the installation is healthy

- Sign in to the web portal.
- Check the version in the footer.
- Open the **Dashboard** — it should load without errors.
- Confirm your account has the **Admin** role (Profile → Roles).

## 2. Set company information

### Settings → Company:

- Company name (as it appears in email notifications, reports, the portal header).
- Logo (optional — PNG / SVG, shows in the portal header and printable reports).
- Timezone — critical. Gets used for all report date boundaries, schedule recurrences, and notification timing.
- Default language — for new users (individuals can override).

## 3. Invite the Mapper

The mapper builds the asset hierarchy, without which nothing else works. Invite them first.

1. **Users → New user.**
2. Name, email, username, password (or use the "send password reset email" option).
3. Assign the **Mapper** role.
4. Save.

The user receives an account-created email and can sign in immediately.

## 4. Invite Supervisors, Managers, Technicians

Add the rest of the team. Don't rush — each user should land in a system that already has enough data to be useful.

- Supervisors first (they'll be assigning work).
- Managers next (they'll be watching reports).
- Technicians last (they'll be executing tasks the mapper and supervisor have set up).

## 5. Review master data

Master data comes pre-seeded with generic defaults. You almost always need to tailor it to your industry:

- **Units** — keep or add whatever your plant uses (bar, psi, gpm, l/min, °C, °F). Set conversion factors if you use multiple compatible units.
- **Products** — replace the placeholder list with your actual lubrication and consumable catalogue.
- **Tools** — add the specific tools your technicians use.
- **Thresholds** — define min/max for the most common measurements. These don't need to be exhaustive — they gate form highlighting, not submission.
- **Repair request types** — what categories of failure do your technicians report?
- **Shutdown reasons** — what are the common causes of a line stop?

See [Master data \(web portal\)](#).

## 6. Configure safety procedures

Work with the Mapper (and your safety officer) to define the acknowledgement workflows that gate certain tasks. See [Safety procedures \(web portal\)](#).

## 7. Configure notifications

**Settings → Notifications** (if your installation has this page) or per-user **Profile → Notifications**:

- Enable / disable email delivery for task events.
- Set the weekly report email time and recipients.
- Configure escalation rules (who gets notified when a shutdown is reported).

## 8. Provision mobile devices

For each device that will use the mobile app:

1. Open **Mobile Setup** (or **Settings → Mobile pairing**).
2. Generate a QR code.
3. Scan it from the device. See [Pairing and setup \(mobile\)](#).

## 9. Set up webhooks (optional)

If other systems need to react to events in the platform (an SAP integration, a Slack feed, a custom BI pipeline):

- **Settings → Webhooks → New webhook**.
- Pick the URL, the events, the authentication.
- Test-fire with the **Send test event** button.

## 10. Verify end-to-end

Have a mapper create one asset and one task. Have a supervisor assign it. Have a technician execute it on mobile. Have the supervisor approve. Confirm the approval appears in reports. If every step works, the installation is truly ready.

## Ongoing Admin work

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Once the installation is running, your work is mostly maintenance:

### Weekly

- Review new user requests (new hires, contractors, auditors).
- Clear lingering user deactivations (people who've left).
- Check the audit log for anything unusual.
- Review the weekly report.

### Monthly

- Reconcile user counts against your organisation's current roster.
- Rotate webhook secrets if your internal security policy requires it.
- Review threshold values against actual measurement history — tighten thresholds where data has stabilised, loosen where they're generating false warnings.
- Review repair request trends with your Managers.

### Ad-hoc

- Password resets (triggered from **Users** → **(user)** → **Reset password**).
- Role changes (promotions, reassignments).
- Tag / asset cleanup (deactivate decommissioned equipment).
- Respond to Pegotec-initiated announcements (release notes, scheduled maintenance).

## User management

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### Creating a user

**Users** → **New user**:

Field	Notes
Name	Display name. Shows everywhere — in assignments, reports, audit logs.
Email	Used for password reset, notifications. Must be unique.
Username	Optional alternative sign-in identifier.
Password	Set directly, or send a reset email.
Roles	Pick one or more. The user's effective permissions are the union.
Production site	Optional scoping for multi-site deployments.

## Editing a user

**Users → (row) → Edit.** Change anything except the email address (email change requires a support case to prevent account takeover). Role changes take effect on the user's next token refresh (usually within a minute).

## Deactivating vs deleting

- **Deactivate** when someone leaves temporarily or permanently. Their data stays; they can't sign in. Use this 99% of the time.
- **Delete** only when a user was created by mistake. Deleting a user with real task history is destructive — task authorship becomes ambiguous.

## Resetting a password

**Users → (user) → Reset password.** The user receives an email with a reset link. The link expires after 24 hours.

## Custom roles

The seven built-in roles cover most cases. If you need a custom permission set:

1. **Roles → New role.**
2. Name the role (descriptive: `Contractor Auditor`, `Safety Officer`).
3. Tick the specific permissions you want to grant from the 40+ available.
4. Save.

### START FROM A COPY

Duplicate an existing role as a starting point and tweak from there — faster and more consistent than building from scratch.

See [User management \(web portal\)](#).

## Master data — the ongoing curation

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Master data isn't "set and forget". As your plant evolves:

- New products come in → add to the Products list.
- New tools arrive → add to the Tools list.
- You realise your thresholds are too loose → tighten them.
- A shutdown reason keeps appearing that isn't in the taxonomy → add it so future reports can categorise it.

Master data drives report quality. The more rigorous your taxonomy, the more useful your reports.

See [Master data \(web portal\)](#).

## Approvals (shared with Supervisors)

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Admins can approve and reject tasks just like Supervisors. In most organisations, Supervisors do the day-to-day approval and Admins step in when:

- A Supervisor is out.
- A task needs executive sign-off.
- An audit spot-check is warranted.

See [Approving tasks \(web portal\)](#).

## The audit log

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Every create, update, delete, and assign action leaves a record. The audit log is visible at **Settings** → **Audit log** (or similar).

Use it to:

- Investigate "who changed what?" questions.
- Support compliance audits.
- Diagnose confusing data ("this task looks wrong — when was it last edited, by whom?").

The audit log is append-only. You can't edit or delete entries.

## Webhooks and integrations

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Webhooks let external systems react to platform events. Typical use cases:

- Post completed tasks to a SAP / Maximo / other CMMS.
- Alert Slack / Teams when a Critical repair request is raised.
- Feed a BI pipeline with shutdown events.

Webhook setup: **Settings** → **Webhooks** → **New webhook**. Pick the event types, provide the target URL, optionally sign requests with a shared secret. See [Webhooks] in [Companies \(web portal\)](#).

## What you can do that Supervisors and Mappers can't

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- Edit company-wide settings ( `settings.edit` ).
- Create or edit **custom roles** (Mapper can only create users and assign existing roles).
- Configure webhooks and integrations.
- Manage the audit log retention.

## Tenant isolation

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Every company in the platform is its own **tenant** — a scoped, isolated slice of the data. A few things follow from this:

- **You only see your own company's data.** Hierarchy, tasks, users, reports, settings — all filtered to your tenant at the server. There's no "accidentally see another customer's data" path.
- **Exports are scoped too.** A CSV or XLSX export you generate only contains data from your tenant.
- **User emails can be reused across tenants.** Two different companies can have a user with email `alice@example.com` — they're separate accounts.
- **Only PegotecUsers can cross tenants.** The PegotecUser role (Pegotec operations staff) can switch between tenants via the company-switcher dropdown in the header. No other role has this.
- **Audit log is per-tenant.** Your activity log shows only actions on your tenant's data.

Why this matters for you as Admin: when you manage users, masters data, or settings, you're configuring your company only. You can't affect another customer's installation, even accidentally. If something goes wrong platform-wide, it's a Pegotec support issue — not something you can fix from Admin.

## What you can't do

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- Manage other companies (PegotecUser only).
- Switch between companies (PegotecUser only).

For a full matrix see [Permissions matrix](#).

## Things to watch for

### DON'T DELETE THE LAST ADMIN

If you delete or deactivate the only user with the Admin role, nobody in your company can manage users anymore. You'll need Pegotec support to intervene. Always have at least two active Admins.

### USE A SHARED SUPPORT MAILBOX

Register at least one Admin account to a shared mailbox (e.g. `maintenance-ops@. . .`). Personal accounts rotate when people leave; shared mailboxes don't.

### MASTER DATA IS GLOBAL WITHIN THE COMPANY

When you delete a unit, product, or tool that's referenced by a task, the reference becomes dangling. The platform usually prevents deletion in these cases, but check carefully before bulk-removing master data.

## Troubleshooting

Problem	See
New user can't sign in	<a href="#">I can't log in</a>
Mobile devices can't pair	<a href="#">Pairing and setup</a>
Reports look empty or wrong	Check date range, company filter, and that tasks are being approved
Notifications aren't arriving	Check <a href="#">Notifications reference</a> and per-user preferences
A user has permissions they shouldn't	Check <b>Users</b> → <b>(user)</b> → <b>Roles</b> — they may be assigned multiple roles
A feature is missing that you expect	It may be behind a feature flag — ask Pegotec support

## Related topics

- [Configuration options \(reference\)](#) — cross-cutting setup decisions in one place.
- [User management \(web portal\)](#)
- [Companies \(web portal\)](#) — for multi-company organisations.
- [Master data \(web portal\)](#)
- [Profile and settings \(web portal\)](#)
- [Approving tasks \(web portal\)](#)
- [Safety procedures \(web portal\)](#)

- [Permissions matrix](#)
- [Notifications reference](#)
- [Contact support](#)

# Viewer handbook

---

Everything a Viewer needs to navigate Smart Maintenance Task Manager with read-only access.

## THIS HANDBOOK IS FOR THE VIEWER ROLE

If you're not sure what role you have, open your profile in the web portal (avatar → **Profile**) or ask your Admin.

## What you'll do with the platform

---

The Viewer role is **read-only**. You can see everything that's relevant for audit or compliance purposes — the asset hierarchy, tasks, schedules, reports, safety procedures — but you can't change anything. You can't assign work, approve submissions, edit data, or execute tasks.

This role is designed for:

- External auditors visiting for compliance or certification.
- Internal compliance officers.
- Safety inspectors reviewing procedure acknowledgements.
- Stakeholders who need visibility without operational responsibility.
- Trainees during onboarding, before they're granted their operational role.

## Your primary app

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The **web portal** is your only app. Viewers don't have mobile access at all.

## What you can see

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All of the analytical and reference surface:

- **Dashboards** — the overview pages that supervisors and managers use.
- **Tasks** — read details of every task in the company, including form values, photos, and acknowledgements.
- **Asset hierarchy** — browse sites, lines, sections, assets, and task points.
- **Scheduling** — view recurring schedules without editing them.
- **Components** — the component catalogue.
- **Safety procedures** — view the acknowledgement steps attached to tasks.

- **Reports** — every standard report, with export.
- **Settings** — view company settings (not edit).

## What you can't see

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- The mobile app.
- Customer-level administration features (user management, roles, webhooks, audit log writes).

## What you can't do

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- Create, edit, or delete anything.
- Assign tasks.
- Approve or reject completed tasks.
- Execute tasks.
- Reset passwords (even your own is limited — you can change your own password, but not others').
- Export individual user data sets for operational use (export is fine for audit).

See the [Permissions matrix](#) for a full per-permission breakdown.

## Typical Viewer workflows

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### Audit: "Show me the last month of safety-gated task executions"

1. **Reports** → **Task Reporting**.
2. Filter by date range (last month).
3. Filter by "has safety procedure".
4. Review the acknowledgement timestamps on submitted tasks — are they plausible (meaningful time spent on each measure)?
5. Export to CSV for your audit file.

### Compliance: "Verify that repair requests are being resolved"

1. **Reports** → **Repair Request Report**.
2. Filter by status and date range.
3. Check resolution times and outcome distributions.
4. Export if needed.

## Onboarding: "Learn the platform before getting operational access"

1. Browse the asset hierarchy — get familiar with how your plant is modelled.
2. Open completed tasks — see what the end-state of the workflow looks like.
3. Read the safety procedures to understand the standards.
4. Read this handbook for role-specific context.

## Incident investigation: "What happened around 15:30 yesterday?"

1. **Reports** → **Task History**.
2. Date range = yesterday, narrow window.
3. Filter by the specific line or asset.
4. Open individual submissions to see photos and notes.
5. Check **Shutdowns** for any reported events in the same window.

## How to export data

---

Every report has CSV and PDF export buttons. Exports reflect your current filter state:

- **CSV** — for analysis in a spreadsheet or BI tool.
- **PDF** — for printing or sharing as an attachment.

Always note the filter state on the cover when you share an export — a date-range mismatch is the easiest way to mislead downstream readers.

## Requesting changes

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If you spot something that needs to change, you can't do it yourself. Instead:

- **Data issue:** flag it to an Admin or Mapper.
- **Process issue:** raise with a Supervisor.
- **Platform issue (bug, missing feature):** route through your Admin, who can escalate to Pegotec support.

## Signing in

---

Same as every other role. See [Your first login](#).


Your landing page is the **Dashboard**.

## Things to watch for

### FILTERS PERSIST ACROSS SESSIONS

If a report looks empty when you return to it, check the filters before concluding there's no data. A stale date range or site filter is the most common culprit.

### USE SEARCH TO NAVIGATE

Press  to focus the global search. Faster than clicking through menus when you know the name of the thing you're looking for.

### YOU WON'T SEE REAL-TIME UPDATES ON MOBILE

The web portal's WebSocket updates apply to the browser session you're in. Since you have no mobile access, you won't see assignment-level notifications — but every change you care about is visible by refreshing or filtering the relevant report.

## Troubleshooting

Problem	See
Can't sign in	<a href="#">I can't log in</a>
Report looks empty	Check date range and filters
Can't find a feature described in this handbook	It may require a different role — <a href="#">Permissions matrix</a>
Page is slow	<a href="#">Performance is slow</a>

## Related topics

- [Navigating the portal](#)
- [Dashboard](#)
- [Reports](#)
- [Asset hierarchy](#)
- [Permissions matrix](#)
- [File formats](#) — export formats.

# PegotecUser handbook

---

Cross-tenant support for Pegotec staff working inside customer installations.

## INTERNAL ROLE ONLY

**PegotecUser** is the only role that can see data across multiple customer companies. Use the access responsibly and follow internal data-handling policy.

## What you'll do with the platform

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As a PegotecUser, you provide second-line support to customers. Your main job is to step into a customer's tenant to diagnose problems, correct data, demonstrate features, or walk them through a workflow — then step out again.

Your main responsibilities:

- **Switch tenant context** to enter a customer's company.
- **Diagnose customer issues** by reproducing what they're reporting.
- **Correct data** when something's wrong and the customer needs help.
- **Walk customers through workflows** when they're unsure how to use a feature.
- **Audit platform-wide behaviour** for compliance and incident investigation.

## Your primary app

---

The **web portal**, with the company-switcher dropdown in the header. You can also use the mobile app if you need to reproduce a mobile-specific issue, but desk work dominates.

## Switching tenants

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Unlike every other role, PegotecUser can change the active company context on demand.

### How to switch

1. Open the company dropdown in the header.
2. Search or scroll for the company.
3. Click. The portal reloads scoped to that company.

Every action you take after switching is **scoped to that company** — but logged with your PegotecUser identity for audit.

## Switching back

Same dropdown. Pick a different company, or click **Exit tenant** to return to your default view.

### **SWITCH CONSCIOUSLY**

Every change you make while switched into a customer tenant looks like it came from Pegotec support. Confirm with the customer before making any write operation.

## Typical support workflows

---

### Customer says "I can't see X"

1. Switch into the customer's tenant.
2. Reproduce their path — the same menu, the same filters.
3. If you can reproduce, diagnose (missing permission? feature flag? data issue?).
4. If you can't reproduce, the issue is role- or filter-specific — ask the customer to check their filters, or log in using their account (with explicit consent).

### Customer says "please fix this data"

1. Switch into the customer's tenant.
2. Read the request carefully — scope matters; "the asset" might mean one asset or many.
3. Before doing any write operation, confirm the scope with the customer.
4. Make the change.
5. Respond with what you changed and when, so they have a clear audit trail in their own records.

### Customer says "show me how to do X"

Don't switch into their tenant unless necessary — you'll be clicking buttons on data that doesn't show up for them. Use a demo tenant or screen-share their own.

## Cross-tenant audit

---

With cross-tenant visibility you can:

- Check aggregate metrics across customers for platform health.

- Investigate incidents that span multiple tenants (rare).
- Respond to data-access requests (GDPR / similar) for a specific individual across the installation.

Cross-tenant work is sensitive. Always follow your internal data-handling policy and record why you accessed what.

## Your effective permissions

---

Inside any company you've switched into, you have the equivalent of **Admin**. You can create, edit, delete, assign, approve — everything. That's by design: it's what lets you help.

The responsibility that comes with it:

- Don't make changes the customer hasn't asked for.
- Always note changes you made in the support ticket.
- Rotate your password regularly and enable 2FA if available.

## What you can do that no other role can

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- Switch between customer companies (`manage-companies` and tenant-switching).
- Act as Admin in any tenant without needing a per-tenant account.

## What you can't do

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- Bypass the audit log — every action you take is logged with your identity.
- Change company-wide billing or licensing (handled outside the platform).

## Things to watch for

---

### ALWAYS CONFIRM BEFORE WRITING

A write operation inside a customer tenant that they didn't request damages trust. Even a well-intentioned cleanup can delete something the customer was keeping for a reason you don't know about.

### USE A SUPPORT TICKET AS YOUR WORKSPACE

Write down what you plan to do before you do it. Attach a screenshot before and after. The ticket becomes the audit trail for the customer and for you.

## EXIT THE TENANT WHEN YOU'RE DONE

Leave the company dropdown pointing somewhere neutral when you walk away from your desk. A forgotten session scoped to a customer tenant is easy to misuse accidentally.

## Support channels

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Customer support runs entirely on **email**:

- Customers email [info@pegotec.net](mailto:info@pegotec.net) during business hours.
- The Pegotec team shares that inbox and picks up incoming messages.
- Whoever takes a request coordinates internally (direct communication between team members, no formal ticket system) and replies to the customer in-thread.
- Pegotec-initiated communications (scheduled maintenance, incident updates) also go out by email.

No support portal, Slack / Teams customer channel, or on-call rotation. Email is the only customer-facing surface. Keep threads alive per issue — it's the implicit "ticket".

## Related topics

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- [Admin handbook](#) — the role whose capabilities you effectively hold inside each tenant.
- [Navigating the portal](#)
- [Companies \(web portal\)](#)
- [Permissions matrix](#)
- [Contact support](#)

# Web portal

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# Web portal

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The web portal is the browser-based admin panel for Smart Maintenance Task Manager. Most non-field work happens here: planning, assignment, approvals, reporting, configuration.

## Who uses it

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Everyone except Technicians (who spend most of their time in the mobile app). The specific features you can access depend on your role — see the [Permissions matrix](#).

## System requirements

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- A recent evergreen browser: Chrome, Edge, Firefox, or Safari (current and previous major version).
- Minimum 1280 × 720 screen. The portal is responsive, but tablets under that size may force horizontal scrolling on dense tables.
- Stable broadband. The portal uses a WebSocket connection for live updates; intermittent connectivity causes stale views until the connection recovers.

## Sections

---

### Daily operations

- [Navigating the portal](#)
- [Dashboard](#)
- [Assigning tasks](#)
- [Approving tasks](#)
- [Scheduling](#)
- [Notifications](#)

### Data

- [Asset hierarchy](#)
- [Components](#)
- [Safety procedures](#)
- [Shutdowns](#)

- [Master data](#)
- [NFC tags](#)

## Reporting

- [Reports](#)

## Administration

- [Companies](#)
- [User management](#)
- [Profile and settings](#)

## Getting started

---

New to the portal? Open [Navigating the portal](#) first — it's a five-minute tour of the layout, menus, and common patterns you'll see on every page.

# Navigating the portal

A tour of the web portal layout: sidebar, header, content area, and the common interaction patterns you'll see on every page.

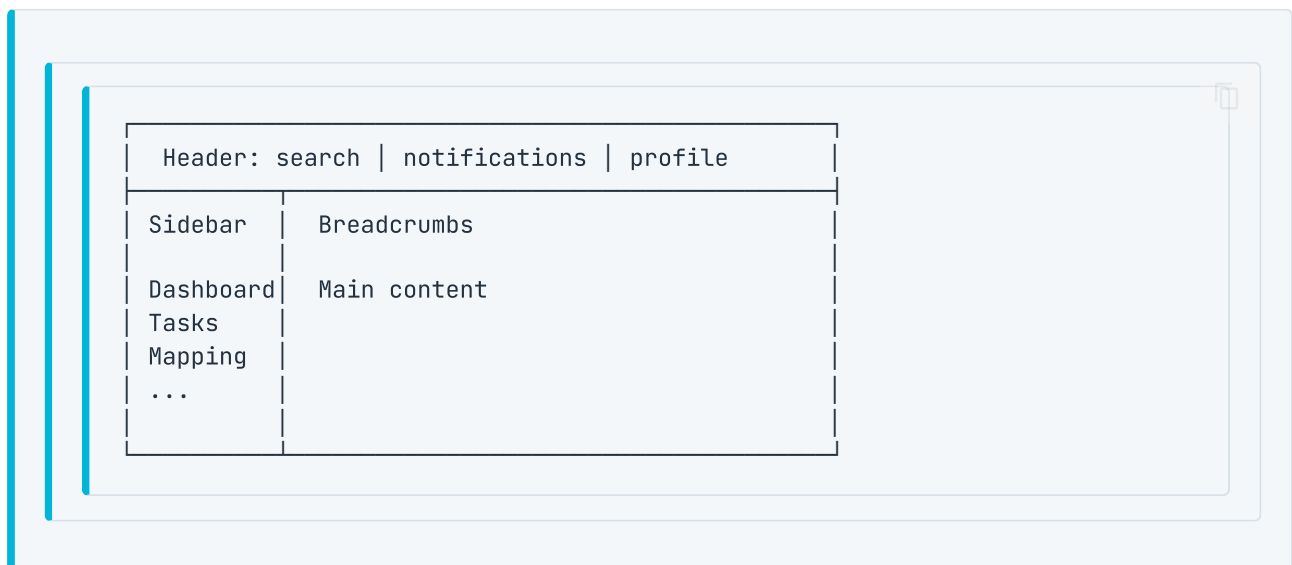
## REQUIRED ROLE

Any role with web portal access.

## Overview

The portal uses a classic admin-panel layout: a fixed sidebar on the left, a header across the top, and a main content area that changes based on what you've selected. Most pages follow the same patterns for tables, filters, and form layouts, so once you learn one, you know them all.

## The layout



## The sidebar

The sidebar is your primary navigation. What appears in it depends on your role — you only see menu items that lead to pages you're allowed to open.

Top-level groups (your mileage varies by role):

- **Dashboard** — the landing page.

- **Tasks** — task list, drafts, history.
- **Assignments** — drag-and-drop assignment interface.
- **Approvals** — task review queue (Supervisor / Admin).
- **Scheduling** — recurring schedules and calendar.
- **Mapping** — asset hierarchy editor.
- **Components** — component catalogue.
- **Master data** — thresholds, units, products, tools, etc.
- **Safety procedures** — safety checklist definitions.
- **Shutdowns** — shutdown reports and history.
- **NFC tags** — tag lifecycle and skip report.
- **Reports** — dashboards and exports.
- **Users** (Admin / Mapper) — user management.
- **Roles** (Admin) — custom role configuration.
- **Settings** (Admin) — company-wide configuration.

## Collapse / expand

The sidebar has a collapse button at the top. Collapsed, it shows only icons — useful on smaller screens. Your preference persists across sessions.

## Role-based visibility

If you don't see a menu item described in this handbook, it's probably because your role doesn't have permission to open that page. See [Permissions matrix](#).

## The header

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### Global search

Click the search icon (or press ) to focus the global search. It searches across:

- Asset hierarchy names.
- Task names.
- User names.
- Component names.

Type a few characters, pick a result, and the portal jumps straight to the matching item.

## Notifications

The bell icon shows your unread notification count. Click to open the notification feed. Each notification links to the relevant entity (the task, the repair request, the shutdown). See [Notifications](#).

## Profile menu

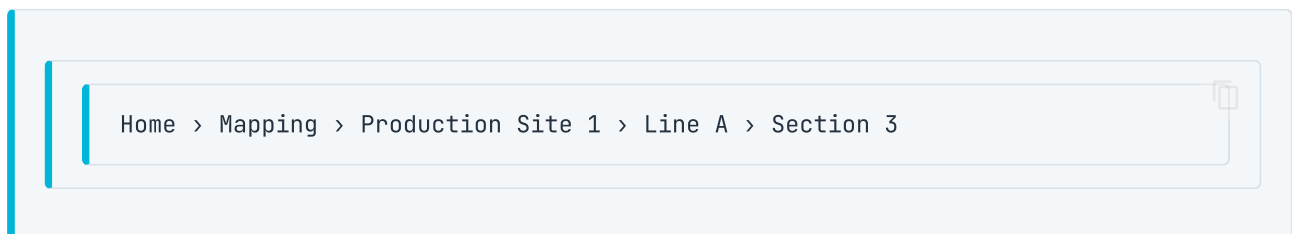
Click your avatar (top right) to open the profile menu:

- **Profile** — name, email, avatar, language, password.
- **Notifications** — notification preferences.
- **Help** — link to this handbook.
- **Sign out** — ends your session.

If you're a PegotecUser with access to multiple companies, the header also includes a **company switcher** dropdown.

## The breadcrumb bar

Just under the header, the breadcrumb shows where you are:



Each segment is clickable — jump back up the hierarchy in one click.

## Common table patterns

Most listing pages show data in a table with the same controls:

### Sorting

Click a column header to sort ascending. Click again for descending. A small arrow shows the current sort direction.

### Filtering

Above the table, a filter bar offers:

- **Text search** — filters across searchable columns.
- **Dropdown filters** — scope by category (status, site, role, etc.).
- **Date range** — for time-bound data (reports, tasks, activity logs).

Filters persist across sessions — the next time you open the page, your last filter state is restored. If a page looks empty when you return, check whether a leftover filter is hiding your data.

## Pagination

Large tables paginate by default at 25 rows. Change the page size at the bottom-right. For tables with tens of thousands of rows, use filters rather than scrolling through pages.

## Bulk actions

Where supported, rows have a checkbox in the first column. Select rows, then use the bulk action bar that appears at the bottom of the viewport:

- **Approve selected.**
- **Assign selected.**
- **Delete selected** (with confirmation).
- **Export selected as CSV.**

## Row actions

Each row usually has a three-dot menu or action icons at the right end:

- **Edit** — open the detail page.
- **Duplicate** — create a copy.
- **Archive / deactivate** — soft delete.
- **Delete** — hard delete (with confirmation).

## Common form patterns

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### Validation

Required fields are marked with a red asterisk. If you try to submit without filling them, inline error messages appear next to the offending field — they don't scroll off-screen.

### Save / Save and continue

Most forms have two buttons:

- **Save** — persists and returns you to the list.
- **Save and continue** — persists and keeps you on the form, useful for iterative editing.

## Discard changes

If you have unsaved changes and navigate away, the portal prompts you to confirm.

## Dependent fields

Some forms update downstream fields based on earlier selections. Changing "Production site" may reset "Line" and "Section" because those lists depend on the site.

## Real-time updates

---

The portal maintains a WebSocket connection to the server. When data changes (a new task gets assigned to you, a task you're watching gets submitted for approval, a shutdown is reported), the relevant views update without a page refresh.

A small indicator in the header shows connection state:

- **Green** — connected, receiving real-time updates.
- **Orange** — reconnecting.
- **Red** — disconnected, data may be stale.

If the connection drops, the portal keeps working — but you'll need to refresh to see changes made by others.

## Dark mode

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Click the sun/moon toggle in the header (if visible) to switch between light and dark themes. Your choice persists across sessions.

## Keyboard navigation

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The portal is mouse- and touch-driven; no global keyboard shortcuts are implemented.

## Responsive behaviour

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The portal is responsive down to about 1024 × 600. Below that, some dense tables force horizontal scrolling. Tablets in portrait and small laptops work fine; phones are technically supported but awkward — use the mobile app for phone-size work.

## Multi-tab behaviour

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You can open multiple tabs of the portal. Each tab shares the same session. Real-time updates flow to every open tab. If you sign out in one tab, all tabs sign out.

## Signing out and sessions


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- Click your avatar → **Sign out** to end the session.
- Sessions idle-expire after a configurable window (default 8 hours).
- After expiry, the next click sends you to the login screen. Your form state is lost — don't leave half-filled forms overnight.

## Help in the UI

---

Many screens include contextual help:

- Hover over a  icon next to a field for a tooltip explanation.
- Click **Help** in the profile menu to jump to this handbook.

## Troubleshooting

---

Problem	See
Menu item is missing	Your role may not have access — <a href="#">Permissions matrix</a>
Page looks empty	Filters may be hiding data — clear the filter bar
Real-time updates aren't arriving	<a href="#">Sync is stuck or failing</a>
Portal is slow	<a href="#">Performance is slow</a>
Keyboard shortcuts don't work	Make sure focus isn't on a text input; some shortcuts are suppressed while typing

## Related topics

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- [Dashboard](#)
- [Profile and settings](#)
- [Notifications](#)
- [Icons and badges](#)
- [Permissions matrix](#)

# Dashboard

---

The operational overview screen — today's task load, completion rate, technician performance, and line availability. This is where most roles land when they sign in.

## REQUIRED ROLE

All web-portal roles except Technician (who has a minimal mobile dashboard instead).

## Overview

---

The Dashboard is a single-page situational-awareness view. It answers "how's today going?" at a glance. The date-range picker at the top controls every widget on the page — by default it shows today; you can zoom out to a week, month, or custom range for trend views.

What the Dashboard shows depends on your role:

- **Supervisors** see assignment and approval queues prominently.
- **Managers** see completion rates, OEE indicators, and technician performance.
- **Admins** see all of the above plus a system-health indicator.
- **Mappers** see hierarchy coverage metrics.
- **Viewers** see the same widgets as Managers but cannot act on any of them.
- **PegotecUser** sees the dashboard of whichever company they've switched into.

## Opening the Dashboard

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The Dashboard is always at the top of the sidebar menu. It's your landing page every time you sign in.

## The date-range picker

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A single control at the top of the page sets the time window for every widget:

- **Today** — default.
- **Yesterday.**
- **Last 7 days.**
- **This month.**

- **Last month.**
- **Custom range** — any two dates.

Your last-used range persists across sessions, so if you always want "this week", set it once.

#### REMEMBER WHAT RANGE YOU'RE IN

It's easy to open the Dashboard on Monday morning, still see the range set to "last week", and draw the wrong conclusion. Glance at the date-range label before you draw conclusions.

## Widgets

### Quick-indicator cards

A row of seven icon cards summarises key counters for the selected range. Each is clickable and drills into the relevant list.

Card	What it counts
<b>Overdue Tasks</b>	Tasks not completed before their due date.
<b>Unassigned Tasks</b>	Active tasks not yet assigned to a technician.
<b>Repair Requests</b>	Repair requests reported by technicians during task execution.
<b>Remarks</b>	Observations noted by technicians.
<b>Notes</b>	Additional notes left by technicians.
<b>Alerts</b>	Measurements above safe limits.
<b>NFC Skipped</b>	NFC verification that was bypassed.

Below the card row, five status blocks summarise the overall task pipeline:

- **Total Tasks** — all tasks within the selected dates.
- **Completion Rate** — completed ÷ assigned, with a progress bar.
- **Completed** — successfully finished.
- **In Progress** — started but not yet finished.
- **Overdue** — not completed before their due date.

**Dashboard**  
Welcome back, Admin

Search... PT Kahatex 01.04.2026 - 24.04.2026

6919 Overdue Tasks  
4 Unassigned Tasks  
0 Repair Requests  
0 Remarks  
0 Notes  
0 Alerts

0 NFC Skipped

Total Tasks: 6943  
Completion Rate: 0%  
Completed: 0  
In Progress: 0  
Overdue: 6919

**Line Performance** (All Production Sit, 13 lines)

LINE	TOTAL	DONE	OVERDUE	RATE
Washing Range Line	4711	0	4711	
Dyeing Line & Lawer	1534	0	1534	
Stenter Line	1002	0	1002	
Calendaring Line	644	0	644	
Cool Pad Batch Line	180	0	180	
Shrinking Line	0	0	0	
Washing Range Line	0	0	0	
Digital Printing Line	0	0	0	
Steamer Line	0	0	0	
Stenter Line	0	0	0	

**Technician Workload** (27 active)

TECHNICIAN	TOTAL	DONE	OVERDUE
Technician 3	2158	0	2158
Technician 5	1448	0	1448
Technician 1	1294	0	1294
Technician 7	818	0	818
Technician 4	745	0	745
Technician 6	296	0	296
Technician 2	180	0	180

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## Completion rate over time

A line or bar chart showing completion rate for each day / week / month in the selected range. Useful for spotting trends — a slow decline is often the first visible signal that something operational has slipped.

## Technician performance

A table of technicians, one row each, with columns for:

- Tasks assigned.
- Tasks completed.
- Completion rate.
- Average time-to-completion.
- Rejection rate.

Sort by any column. Click a row to drill into that technician's activity. This is where Supervisors and Managers spot coaching opportunities or imbalances.

## Line availability

A table or chart per production line, with uptime percentage and total downtime in the selected range. Cross-references the Shutdown data.

## Open items

Quick counts of:

- Pending approvals (your queue, if you're a Supervisor / Admin).
- Open repair requests.
- Active shutdowns.

Each is clickable — jump straight to the list.

## Real-time updates

---

The Dashboard subscribes to a WebSocket channel and updates its widgets live:

- A new task submission increments the **Pending approval** count.
- An approval moves a task out of pending into completed.
- A new repair request increments the open-items count.
- A reported shutdown flashes the affected line.

If the WebSocket connection drops, the indicator in the header turns orange; refresh the page to resync.

## Drilling down

---

Most widgets are clickable:

- Click a count → go to the relevant list (e.g. **Overdue** → tasks filtered to overdue).
- Click a technician row → their personal detail page.
- Click a line in Line Availability → the line's hierarchy page.

This is faster than navigating through the sidebar.

## Customisation

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Some installations let you pin / unpin widgets or reorder them. Click the settings icon at the top-right of the Dashboard to open the customisation panel (if present).

Layout preferences persist per user.

## How widgets compute their numbers

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The exact definitions are worth knowing:

Metric	Definition
<b>Assigned</b>	Tasks scheduled to occur in the window.
<b>Completed</b>	Tasks submitted <b>and approved</b> within the window.
<b>Overdue</b>	Tasks whose due time is in the past and whose status is not Approved.
<b>Pending approval</b>	Submitted tasks with status "Pending".
<b>Completion rate</b>	$\text{Completed} \div \text{Assigned} \times 100$ .
<b>Time-to-completion</b>	Submission time minus assignment time, averaged.
<b>Rejection rate</b>	$\text{Rejections} \div (\text{Submissions}) \times 100$ .

If numbers look wrong, start with filters and definitions — the numbers are almost always right; what's often wrong is your assumption about which window or metric you're looking at.

## Printing / exporting

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The Dashboard doesn't have a native export, but all its underlying data is available via individual reports:

- [Reports → Completion Report](#) for completion metrics.
- [Reports → Technician Comparison](#) for the technician table.
- [Reports → Asset Availability](#) for line uptime.

Filter each report to the same date range as the Dashboard to reproduce the view in exportable form.

## Things to watch for

### DON'T PANIC ON A SLOW DAY

A single low-completion morning doesn't mean the team's broken. Zoom out before drawing conclusions. Look at the 7-day view.

### PENDING APPROVALS BLOAT COMPLETION RATE

If your approval queue is backed up, the dashboard underreports completion. Clear approvals regularly to keep the Dashboard honest.

### TIMEZONE

All dates are rendered in your company's configured timezone (see [Profile and settings](#)). If you're working across timezones, this is worth double-checking.

## Troubleshooting

Problem	Fix
Dashboard looks empty	Check the date range first
A widget is missing	Your role may not have access — <a href="#">Permissions matrix</a>
Numbers don't match a report	Check both have the same date range and filters
Updates aren't flowing live	See <a href="#">Sync is stuck or failing</a> (WebSocket section)
Dashboard is slow	<a href="#">Performance is slow</a>

## Related topics

- [Reports](#) — detailed and exportable equivalents.
- [Approving tasks](#) — clearing the pending-approval queue.
- [Assigning tasks](#) — upstream of the assignment counts.
- [Navigating the portal](#)
- [Icons and badges](#)

# Global search

---

Find anything in your company — asset, task, user, component — from anywhere in the portal, in seconds.

## REQUIRED ROLE

Any role with web-portal access.

## Overview

---

Global search is the fastest way to navigate the portal. Instead of clicking through menus to find a specific asset or task, hit the search shortcut and type.

Search covers:

- **Asset hierarchy** — production sites, lines, sections, assets, task points.
- **Tasks** — by task name, asset name, or assigned technician.
- **Users** — by name, email, username.
- **Components** — by component name, component type.
- **Repair requests** — by asset or description.
- **Shutdowns** — by reason or asset.

## Open search

---

Three ways in:

- **Keyboard shortcut** — press `/` anywhere in the portal.
- **Search icon** — top of the header, next to the notification bell.
- **URL** — `/search?q=your+query` (handy for shared links).

The search panel opens over the current page. Results appear as you type.

## Type a query

---

The search is **instant** — results update every few keystrokes. No need to press Enter.

Queries are **case-insensitive** and match substrings. Typing `303` finds `Line L-303`, `Pump P-303`, and any task or user with `303` in the name.

## Result grouping

Results are grouped by type:

- **Assets** (with full hierarchy breadcrumb).
- **Tasks** (with asset + due date).
- **Users** (with roles).
- **Components**.
- **Other** (repair requests, shutdowns, etc.).

Each group shows up to 5 results by default; click **See all N** to see the full list.

## Pick a result

- **Enter** on the highlighted row opens it.
- **Arrow keys** ↑ ↓ move the selection.
- **Mouse click** — same as Enter.

Opening a result navigates to the entity's detail page.

## Example queries

You type	You probably find
<code>L-103</code>	The line / asset named L-103.
<code>grease</code>	Every task / task point with "grease" in the name.
<code>smith</code>	Users with "Smith" in their name.
<code>pump</code>	Pump components and pump-class assets.
<code>overdue</code>	Doesn't work for status filters — use the Tasks page's filter instead.

Global search matches **names and labels**, not status or state. For "all overdue tasks", use the Tasks page's own filter bar.

## Keyboard-first workflow

---

For power users:

1. Press `/` anywhere → search opens with focus.
2. Type the first few characters.
3. Arrow-down to the result.
4. Enter to open.

Total: ~2 seconds from anywhere in the portal to any entity.

## What search does NOT do

---

- **Full-text search of free-text notes** — names and structured fields only. Search doesn't index task notes or remark bodies. If you need that, filter the Task History report.
- **Search across companies** — scope is your active company (PegotecUser can switch company first, then search).
- **Regex / wildcards** — plain substring match only.
- **Fuzzy match** — typos don't match. `pmup` won't find `pump`.

For anything beyond names, use the appropriate section's filter bar (Tasks filter, Reports filter, etc.).

## Scope by role

---

Search only surfaces entities you have permission to see:

- A **Viewer** sees assets and tasks but not user-management records.
- A **Technician** sees their own tasks and the hierarchy, but not the audit log.
- An **Admin** sees everything in their company.

If a colleague mentions an entity you can't find, the most likely reason is permission-scoping rather than search failure.

## Things to watch for

---

### USE SEARCH INSTEAD OF SCROLLING THE HIERARCHY

Especially on mature plants with thousands of task points — typing 3 letters is faster than expanding eight levels of tree.


### SEARCH ISN'T A FILTER

Search finds one thing fast. Filters narrow a whole list. Use filters when the question is "show me all overdue electrical tasks on Line 3" — not search.

### DON'T RELY ON SEARCH FOR SECURITY

Search won't return entities you don't have permission to see, but that's a side-effect of filtering on the server. It's not an access control; it's a UI convenience. Access control lives in roles and permissions.

## Troubleshooting

Problem	Fix
Search finds nothing when the entity exists	Confirm spelling; confirm your role has access to that entity type
Search is slow	On very large tenants, the first search after opening the portal warms the index — subsequent are fast
Can't open a result	The entity may have been deleted while the search was open; refresh
 shortcut doesn't work	Focus is probably in a text input; click outside first

## Related topics

- [Navigating the portal](#) — other navigation patterns.
- [Asset hierarchy](#) — the tree view as an alternative.
- [Reports](#) — for queries that need filtering, not finding.

# Profile and settings

---

Manage your personal account: name, email, password, avatar, language, and notification preferences. If you're an Admin, company-wide settings also live here.

## REQUIRED ROLE

Every web-portal role has a profile. Admins additionally manage company-wide settings.

## Overview

---

Your profile is where you control how you appear to other users (name, avatar), how you sign in (password, email, username), how the portal presents itself to you (language, timezone), and what notifications you receive. Admins also manage company-level settings under **Settings** in the sidebar.

## Open your profile

---

Click your avatar in the top-right corner → **Profile**.

The profile page is organised in tabs:

- **Personal information.**
- **Password.**
- **Avatar.**
- **Language.**
- **Notifications.**
- **Sessions** (if enabled on your installation).

## Personal information

---

### Change your name

1. Profile → **Personal information.**
2. Edit the **Name** field.
3. Click **Save.**

Changes propagate immediately to everywhere your name appears: assignments, reports, the audit log, notification sent by you.

## Change your username

Username is an optional alternative sign-in identifier.

1. Profile → Personal information.
2. Edit **Username**. Must be unique across your company.
3. Save.

## Change your email

Email is your primary sign-in identifier. You can **not** change it yourself — doing so would let a compromised account be quietly redirected. Ask an Admin to change it for you, or (for Admins) request the change via Pegotec support.

Once changed, password-reset emails and notifications go to the new address.

## Change your password

---

1. Profile → **Password**.
2. Enter your **current password**.
3. Enter a new password (minimum 8 characters).
4. Confirm the new password.
5. Click **Save**.

You stay signed in after the change — other browser sessions you're signed in on are left alone unless your installation enforces a "sign out all sessions on password change" policy.

If you forgot your password, sign out and use **Forgot password?** on the login screen. See [I can't log in](#).

## Avatar

---

Upload a profile picture that appears next to your name across the portal.

1. Profile → **Avatar**.
2. Click **Upload** and pick a JPEG or PNG.
3. Crop as needed.
4. Save.

Removing the avatar reverts to a system-generated placeholder with your initials.

## Language

---

Change the UI language for yourself only. Your choice doesn't affect colleagues.

1. Profile → **Language**.
2. Pick from the 14 supported languages.
3. Save.

The portal reloads in your chosen language. See [Supported languages](#) and [Language and locale](#).

## Timezone

---

Your company's default timezone applies unless your installation enables per-user overrides. If it does, change your timezone here — it affects how dates and times are rendered on your screen (it does **not** retroactively change the timestamps in stored data).

## Notifications

---

Three channels; toggle each independently:

- **In-app** — the notification bell in the header. Always on.
- **Push** — mobile push (if you also use the mobile app).
- **Email** — from `noreply@sm-tm.app`.

Beyond the channels, you can enable or disable specific **categories**:

- Task assigned to me.
- Task due soon.
- Task overdue.
- Task approved / rejected (for tasks you submitted).
- New repair request (if you're in a role that triages them).
- New shutdown reported.
- Weekly report summary.

See [Notifications reference](#) for what each category means and who typically receives it.

## Sessions

---

If your installation enables session management:

- **Sessions** tab lists every device / browser you're signed in on, with last-active time and approximate location.
- Click **Sign out** on any session you don't recognise or no longer use.
- **Sign out of all other sessions** — a single button to terminate everything except the current session.

Use this after a forgotten laptop at an airport, or before changing devices.

### When you'll be logged out automatically

The platform signs you out automatically in several cases:

Trigger	What happens
<b>Web session expires after 24 hours</b>	Next click sends you to the login screen. Re-sign-in to continue.
<b>Mobile session expires after 30 days</b>	App prompts for password on next open; biometric alone won't let you through.
<b>You change your password</b>	Every signed-in session (web and mobile) is terminated immediately. You re-sign-in with the new password on each device.
<b>Admin deactivates your account</b>	Every session is terminated within a minute.
<b>Admin changes your roles</b>	Your current session continues, but permissions refresh on the next token cycle (within a minute).

Expired sessions don't destroy drafts on mobile or unsaved work in web forms — the data is there when you sign back in (assuming the form wasn't discarded by the browser refresh).

### Company switcher (PegotecUser only)

---

If you're a PegotecUser, the header contains a **company switcher** dropdown that isn't available to anyone else. Pick a company; the portal reloads scoped to that company. See [PegotecUser handbook](#).

### Company settings (Admin only)

---

Admins see a **Settings** entry in the sidebar with company-wide controls that affect every user in the company.

## Company information

- **Name** — shown in portal header, email notifications, report headers.
- **Logo** — PNG or SVG, shown in the header and printable reports.
- **Timezone** — used by all report date boundaries, schedule recurrences, and notification timing.
- **Default language** — for newly created users (individuals can override).
- **Address** — optional, appears on printable exports.

## Notification defaults

Company-wide defaults for each notification category. Users can override for themselves on their own profile.

## Feature flags

Enable or disable optional features for your company. Not every installation exposes this.

## Webhooks

See [Companies](#). Outbound event subscriptions for integrations.

## Audit log

Append-only record of every user management action, every create / edit / delete / assign. Visible only to Admins. See [Admin handbook > The audit log](#).

## Things to watch for

### EMAIL CHANGE IS PRIVILEGED

You can't change your own email. This is deliberate — a stolen account would otherwise be easy to lock the real owner out of.

### CHECK YOUR SESSIONS AFTER A SHARED-COMPUTER USE

If you ever sign in on a public or shared machine, sign out of that session when you're done, or terminate it later from **Sessions**.

### LANGUAGE CHANGES DON'T TRANSLATE DATA

Changing your language affects the UI only. Asset names, user names, and free-text notes stay in the language they were typed.

## Troubleshooting

---

Problem	See
Password reset email never arrives	Check spam; confirm your email is current — <a href="#">I can't log in</a>
Language change didn't apply	Try sign-out / sign-in; see <a href="#">Language isn't updating</a>
Avatar upload fails	Try JPEG or PNG under 5 MB
Session list empty / wrong	Sessions may not be enabled on your installation; contact your Admin

## Related topics

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- [Navigating the portal](#)
- [Notifications](#) — details on each channel and category.
- [Language and locale](#)
- [Admin handbook](#) — for Admins configuring company-wide settings.
- [Notifications reference](#)

# Notifications (web portal)

---

Read, manage, and configure the notifications you receive in the browser, by email, and on the mobile app.

## REQUIRED ROLE

Any role with a web portal account has a personal notification feed. Admins additionally configure company-wide notification rules.

## Overview

---

The web portal surfaces notifications in three places:

- **Bell icon** in the header — unread-count badge; clicking opens the feed.
- **Notification feed** — the list of every notification you've received, newest first.
- **Email inbox** — for notifications delivered by email (if you have email enabled for that category).

A fourth channel, **push**, goes to the mobile app if you also use it. Push doesn't show in the portal.

Your notification preferences are personal — changing them only affects you. Admins set the **company-wide defaults** that apply to new users.

## Open the notification feed

---

Click the bell icon in the header. A panel slides open showing recent notifications. Click **See all** to open the full feed as a page.

Each notification shows:

- An icon / category tag (task, repair, shutdown, etc.).
- A one-line summary.
- A timestamp (relative: "5 minutes ago").
- An unread dot if you haven't opened it yet.

Click any notification to:

- Mark it read.
- Jump to the relevant entity (the task, the repair request, the shutdown).

## Filter the feed

At the top of the full feed page:

- **Show:** All / Unread / Read.
- **Category:** filter to a single category.
- **Date range.**

Your filter state persists while you're on the page.

## Mark all as read

One button in the full feed. Useful when you've been away and come back to hundreds.

## Change your notification preferences

Profile → **Notifications**. You see a matrix of categories by channel:

Category	In-app	Email	Push
Task assigned to me	<input type="checkbox"/>	—	<input type="checkbox"/>
Task due soon	<input type="checkbox"/>	—	<input type="checkbox"/>
Task overdue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Task approved	<input type="checkbox"/>	—	<input type="checkbox"/>
Task rejected	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New repair request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repair request updated	<input type="checkbox"/>	—	<input type="checkbox"/>
New shutdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly report	—	<input type="checkbox"/>	—

Tick or untick each cell. **Save**. The changes apply to notifications generated after you saved.

### IN-APP IS ALWAYS ON FOR CRITICAL CATEGORIES

A few categories — task rejection, critical shutdowns — always show in-app regardless of your preferences. You can suppress email and push for these, but not in-app.

See [Notifications reference](#) for the full category list with recipient rules.

## Company-wide defaults (Admin only)

---

Admins see **Settings → Notifications** in the sidebar, which configures the defaults that apply to newly-created users. Changing defaults doesn't overwrite existing users' personal preferences.

Admins can also configure:

- **Weekly report recipients** — who receives the Monday 07:00 summary email.
- **Escalation rules** — who gets notified when a critical shutdown is reported.
- **Quiet hours** (if your installation enables this) — suppress non-critical push notifications overnight.

## Real-time notifications

---

New notifications arrive in the portal via the WebSocket connection:

- The bell icon's unread badge updates live.
- A small toast briefly appears at the bottom-right of the screen.
- If you have the feed page open, the new notification slides in at the top.

If your WebSocket indicator is red (disconnected), notifications still arrive — you just won't see them until you refresh or the connection recovers.

## Email notifications

---

Emails come from `noreply@sm-tm.app`.

- Reply-to is ignored; replies bounce. Use your support channel for responses.
- Each email has an **Unsubscribe** link at the bottom that toggles off email for that category specifically.
- Subject lines are translated into your preferred language.
- HTML email by default, with plain-text fallback.

## Push notifications

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Push goes to the mobile app only; it doesn't appear in the web portal. See [Notifications \(mobile\)](#).

## Do-not-disturb patterns

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If the volume of notifications is high, narrow your settings rather than muting everything:

- Keep **Task rejected** on (you'll miss rework otherwise).
- Keep **New shutdown** and **Repair request update** on (high-value).
- Turn **Task assigned** off in email (in-app is enough if you're at your desk).
- Turn **Task due soon** off in push on the web portal side if you're also on mobile.

## Things to watch for

### DON'T SILENCE EVERYTHING

It's tempting when the feed gets noisy. But turning off the wrong category (rejected tasks, critical shutdowns) means you miss work that's waiting for you.

### UNSUBSCRIBE FROM EMAIL FOR CHATTY CATEGORIES

Email is the easiest channel to mute per-category without losing the in-app feed entry.

### DEFAULT-ON FOR NEW USERS

When an Admin creates a new user, every category is enabled by default. New users are often surprised by the volume and learn to tune their preferences within a week.

## Troubleshooting

Problem	Fix
Not receiving emails	Check spam; check the email on file; ensure your category preference is on
Bell doesn't update live	WebSocket may be disconnected — refresh the page
Unread count doesn't clear	Click <b>Mark all as read</b> on the full feed
Weekly report not arriving	Admin may not have listed you as a recipient

## Related topics

- [Profile and settings](#) — where personal preferences live.
- [Notifications reference](#) — every notification the system can send.
- [Notifications \(mobile\)](#) — the mobile side.
- [Admin handbook](#) — for Admins configuring defaults.

# Asset hierarchy

Build and maintain the five-level asset tree that everything else in the platform depends on:  
**Production Site → Line → Section → Asset → Task Point.**

## REQUIRED ROLE

Mapper or Admin.

## Overview

The asset hierarchy is the spine of the platform. Every task lives on a task point; every NFC tag points to a task point; every schedule generates work at a task point. If the hierarchy is wrong or missing, nothing downstream works.

This page covers how to build, edit, import, and reorganise the hierarchy in the web portal. The same data model is editable on the mobile app — see [Creating hierarchy \(mobile\)](#).

## The five levels

Level	What it represents	Example
<b>Production Site</b>	A physical location — a factory, plant, or site.	Bandung Plant
<b>Line</b>	A production line within the site.	Weaving Line 3
<b>Section</b>	A zone within a line (often drive side / operator side).	Operator side
<b>Asset</b>	A specific piece of equipment.	Loom L-314
<b>Task Point</b>	The spot on the asset where a task is performed.	Main bearing grease point

Tasks attach at the task-point level. So do NFC tags, schedules, and measurement history.

## Prerequisites

- You have the Mapper or Admin role.
- You've thought about the naming convention you want to use before you start.

## Open the mapping page

**Mapping** in the sidebar. You land on the **Web Mapping** page with a grid of production-site cards. Each card shows the site name, total task count, line count, per-task-type counters (Electrical / Lubrication / Mechanical / Production) and Edit / Duplicate / Delete controls. The top-right has **Import / Export**, **Recycle Bin**, and **Add Production Site** buttons.

The screenshot shows the 'Web Mapping' page in the Smart Maintenance Task Manager. The page features a sidebar on the left with navigation options, a top navigation bar with a search bar and user profile, and a main content area displaying a grid of production-site cards. The cards are titled 'FINISHING 1', 'FINISHING 3', 'FINISHING 5', 'Finishing 9', and 'FINISHING X'. Each card displays a large task count, a line count, and per-task-type counters (Electrical, Lubrication, Mechanical, Production). Action buttons for 'Import / Export', 'Recycle Bin', and 'Add Production Site' are located at the top right of the main content area.

## Create a Production Site

1. Click **New production site**.
2. Fill in:
  - **Name** — short, unique.
  - **Timezone** — defaults to your company timezone; override if the site is in a different timezone.
  - **Address** (optional) — shows on printable reports.
3. Save.

The new site appears in the list. Click it to drill in.

## Create Lines under a site

---

From the site's detail page:

1. Click **New line**.
2. Fill in:
  - **Name** — stable, unique within the site.
  - **Order** — lines display in this order. Leave the default to append.
3. Save.

## Create Sections under a line

---

From the line's detail page:

1. Click **New section**.
2. Name, (optional) description, order.
3. Save.

Sections are optional — if a line is simple enough that zones don't add clarity, skip this level and put Assets directly under the line.

## Create Assets

---

From the section (or line) detail page:

1. Click **New asset**.
2. Fill in:
  - **Name** — unique identifier (asset code, equipment tag).
  - **Component type** — links the asset to a component definition, which brings its default tasks with it. See [Components](#).
  - **Order**.
3. Save.

## Create Task Points

---

From the asset's detail page:

1. Click **New task point**.
2. Fill in:

- **Name** — concise, specific ("Main bearing grease point" not "grease point").
- **Description** (optional).
- **Position indicator** (optional) — helpful when an asset has many similar points.
- **Order**.

3. Save.

Once the task point exists, you can:

- Attach one or more tasks.
- Register an NFC tag that points to it.
- Attach a safety procedure.
- Set up a recurring schedule.

## Bulk import via CSV

For large hierarchies, typing everything is impractical. Use CSV import.

### Format

One row per node. Required columns:

```
type,parent_name,name,component_type,order
production_site,,Bandung Plant,,1
line,Bandung Plant,Weaving Line 3,,1
section,Weaving Line 3,Operator side,,1
asset,Operator side,Loom L-314,Loom,1
task_point,Loom L-314,Main bearing grease point,,1
```

- `type` — one of `production_site`, `line`, `section`, `asset`, `task_point`.
- `parent_name` — must match the `name` of the row that defines the parent.
- `name` — the node's own name.
- `component_type` — only for `asset` rows; blank elsewhere.
- `order` — display order under the parent.

UTF-8 encoding, comma delimiter, first row must be the header.

## Running the import

1. **Mapping → Import.**
2. Select the CSV.
3. Preview — the portal shows what it parsed. Errors (missing parents, duplicate names) are flagged here, before anything is saved.
4. If the preview looks right, click **Import**.
5. The import runs in the background. You'll see a progress bar; large imports (thousands of rows) can take a minute or two.

## CSV gotchas

- Windows line endings are fine.
- Quoting: only quote fields that contain commas or line breaks.
- Names with embedded commas: quote the whole field.
- Duplicate names at the same level are rejected.

## Edit an existing node

---

Click any node to open its detail page. Every field can be edited except the type (you can't turn a Line into a Section without deleting and recreating).

Common edits:

- Rename — takes effect immediately. All downstream references (tasks, tags, schedules) update automatically.
- Reorder — drag the node up or down in the parent's list.
- Add a description.
- Change the linked component (Asset level).

## Move a node to a different parent

---

Drag and drop in the tree view, or click **Edit → Parent** on the detail page and pick a new parent.

### MOVING DOESN'T BREAK TASKS OR TAGS

Tasks and NFC tags move with their parent. But think before you move — a task point that moves from one asset to another might not make sense in its new context.

## Delete a node

---

1. Open the node's detail page.
2. Click **Delete**.
3. Confirm.

### What gets deleted

When you delete a parent, everything under it goes too. The portal warns you with a count:

Deleting "Weaving Line 3" will also delete 4 sections, 52 assets, and 312 task points. 180 tasks will be orphaned. Continue?

Orphaned tasks are archived, not executed, and become invisible to technicians. They remain in the audit log.

#### **DELETION IS DESTRUCTIVE**

Task history is preserved, but the structure that produced it is gone. Deactivating (rather than deleting) is safer when you're unsure — see below.

### Deactivate instead

For equipment that's been decommissioned but you may want history on:

1. Open the node's detail page.
2. Click **Deactivate**.
3. The node is hidden from new task generation and assignment, but visible in reports.

## Searching the hierarchy

---

The global search (top of the page, or ) searches across all hierarchy names. Type a few characters — results show the full breadcrumb so you know which node you're looking at.

## Visual editor (webmapping)

---

For plants where spatial layout matters — where technicians think about "the motor at the end of the line" — the **Webmapping** page gives a visual editor. Drag assets onto a background image of your plant to place them geographically; link each placement to an asset in the hierarchy.

This is optional. The hierarchy works fine without a visual layout.

## Reorganising without re-entering data

---

Common refactors and how to handle them:

### Adding a Section between a Line and its Assets

1. Create the new Section under the Line.
2. Move the Assets into the new Section (drag-drop or edit parent).
3. Task history, tags, and schedules follow automatically.

### Splitting one Line into two

1. Create the second Line.
2. Move Sections/Assets into the new Line as appropriate.
3. Rename the original Line if it no longer represents the full scope.

### Merging two Lines

1. Move everything from Line B into Line A.
2. Delete (empty) Line B.

## Relationship to other features

---

- **Components** — linking an Asset to a Component brings the component's default tasks onto the Asset.
- **Schedules** — attached to tasks (which live on task points).
- **NFC tags** — registered against task points; written with the mobile app.
- **Safety procedures** — attached to tasks.
- **Reports** — every report can filter by hierarchy level.

## Things to watch for

---

### PLAN THE TREE BEFORE YOU BUILD

Restructuring a populated tree is much more work than structuring it once, carefully, up front. Talk to Supervisors and technicians before you commit.

**⚠️ DON'T USE THE HIERARCHY FOR EVERYTHING**

The hierarchy is for physical equipment. Don't encode organisational concepts (shifts, crews, contracts) as hierarchy nodes — those belong in user/role configuration.

**📄 NAMES PERSIST IN REPORTS**

Reports historically reference the name as it was at the time of the task. Renaming is safe going forward, but historical reports may show the old name until you regenerate them.

## Troubleshooting

---

Problem	Fix
CSV import fails with "parent not found"	The row referencing this parent comes before the parent's own row — reorder.
Can't delete a node — "has dependencies"	Orphan / move the dependent tasks or tags first.
Rename doesn't update everywhere	Refresh. If still inconsistent, contact support with the before/after names.
Drag-drop reorder doesn't stick	Check for connection issues; the WebSocket may have dropped.

## Related topics

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- [Components](#) — defining reusable equipment types.
- [Scheduling](#) — attaching recurring schedules to tasks.
- [NFC tags](#) — registering physical tags.
- [Safety procedures](#) — linking safety steps to tasks.
- [Creating hierarchy \(mobile\)](#) — the same data model from the mobile app.
- [Mapper handbook](#) — the role overview.
- [File formats](#) — CSV format details.

# NFC tags

Manage the lifecycle of NFC tags on the web portal: registration, asset linking, deactivation, and skip-report analysis.

## REQUIRED ROLE

Mapper or Admin for create / edit. Supervisor has read-only access to the skip report.

## Overview

Every physical NFC tag in your plant has a corresponding record on the web portal. The record tracks:

- Which task point the tag links to.
- When the tag was written (and by whom).
- Whether the tag is active.
- The scan-skip history that feeds the **skip report**.

Mappers write tags on mobile (see [Writing NFC tags](#)). The web portal is where you see them listed, deactivate damaged ones, and analyse the skip report.

## Open the NFC tags page

**NFC tags** in the sidebar. The list shows:

Column	Meaning
Tag ID	The platform-generated ID encoded on the physical tag.
Linked task point	Asset > task point (or just the asset if the tag is assigned at asset level).
Written by	Mapper who wrote the tag.
Written at	Timestamp.
Last scan	When it was last scanned, and by whom.
Active	Toggle.
Skip count	Number of recent scans that didn't lead to a task execution.

## Register / view a tag

---

You don't usually **create** a tag on the web portal — tags are written on mobile and auto-register when the write succeeds. The web portal is where you view them.

To jump to a tag's detail page:

- Click the row in the list.
- Or scan the physical tag on mobile, then look it up on web by the ID shown in the app.

The detail page shows:

- Tag ID and the NDEF record content written to the chip.
- Links to the task point and parent asset.
- Scan history (last 50 scans).
- Who wrote, edited, or deactivated it.

## Deactivate a tag

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When a tag is damaged, lost, or replaced:

1. NFC tags → (row) → **Deactivate**.
2. Confirm.

Deactivated tags still show in history but won't match a scan. Technicians who scan a deactivated tag see "Tag deactivated — please report to your Mapper".

### **DEACTIVATE, DON'T DELETE**

Deletion removes the audit trail for the tag. Deactivation preserves everything and is reversible if the tag turns up again.

## Reactivate a tag

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Filter to **Inactive**, open the tag, **Reactivate**. Useful if a tag that was marked lost shows up intact.

## Rewrite / replace

---

When a physical tag is damaged, the mapper writes a new blank tag referencing the same task point. See [Writing NFC tags](#).

From the web portal's perspective:

- The old tag record stays in history.

- A new tag record is created when the replacement is written.
- The scan history starts fresh on the new tag.

If the replacement writes the same tag ID (same task point), the history merges automatically.

## Skip report

A **skip** is when a technician scans a tag but doesn't complete the related task within a short window (configurable, default 10 minutes). Skips happen for mundane reasons (the tech got interrupted) and for concerning reasons (the tech tapped to acknowledge presence but didn't actually do the work).

### Open the skip report

NFC tags → **Skip report** tab. You see a table:

Column	Meaning
Tag / Task point	Which point is being scanned and not followed through on.
Technician	Who's scanning.
Scan count	Total scans in the selected date range.
Skip count	Scans not followed by task completion.
Skip rate	Skip count ÷ Scan count.

Sort by **Skip rate** or **Skip count** descending to surface the worst offenders.

### Interpreting skips

- **High skip rate on one technician, across many tags** → behavioural issue. Coach.
- **High skip rate on one tag, across many technicians** → tag placement problem (mis-labelled, hard to reach). Move or rewrite.
- **Gradual increase across the plant** → training or process drift; raise in your next team meeting.

The skip report is a leading indicator of data integrity problems. Use it monthly at minimum.

### Acting on a skip

Open a row for drill-down. The detail page shows individual skipped scans with timestamps so you can pinpoint when the pattern started. Coaching conversations go much better when you have specifics ("on Monday and Tuesday last week you scanned these six tags without completing the task") than generalities.

## Bulk deactivation

---

If you're retiring a whole section of the plant:

1. Filter the list to the affected area (by asset / line).
2. Select all → bulk action → **Deactivate**.
3. Confirm.

## Tag audit reports

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Reports → Task Reporting has a **Tag scanned?** filter. Use it to sanity-check whether task completions are following tag scans, or whether technicians are doing tasks without scanning first (bypassing the NFC workflow).

## Print QR code labels

---

Some sites use printed QR codes instead of (or alongside) NFC tags — particularly on equipment classes where NFC is awkward (heavy metal, wash-down-rated areas). The portal can print a sheet of QR labels directly.

### Print a single QR code

1. Open a task point in the hierarchy.
2. Three-dot menu → **Print QR label**.
3. A print dialog opens with the QR sized for a standard label sticker.
4. Print to your label printer, or print on A4 and cut.

### Print a batch — 3×3 A4 grid

For commissioning a whole line at once:

1. NFC tags → **Print batch**.
2. Select the task points you want QRs for (use the filter bar to narrow).
3. The portal opens a print preview: a 3×3 grid of QR labels per A4 page (nine labels per sheet).
4. Each label includes:
  - The QR code itself.
  - The asset + task point name below.
  - The task-point ID.
5. Print to A4, cut along the guides, apply to equipment.

## Label sizing

The 3×3 grid uses ~6 cm per label — enough for reliable scanning at arm's length with a phone camera. If you need smaller labels (for compact equipment):

- **Single print** with a label printer (Brother QL / Dymo etc.) gives you freedom to set size.
- For A4 printing, nine per sheet is the practical minimum for scan reliability.

## When to use QR labels vs NFC

Situation	Choose
Normal industrial environment, NFC tags available	NFC (faster to scan)
Heavy metal surface that defeats NFC	QR label
Wash-down area where stickers peel	Engraved metal plates with QR (custom print)
Budget constraint — NFC tags are ~\$0.50 each, printed labels are effectively free	QR label
Technician's phone has no NFC	QR label (camera always works)

Many sites mix both — NFC where it works well, QR where it doesn't.

## Replacing a printed label

A worn or damaged QR label is replaced the same way as an NFC tag:

1. Reprint the label from the task point's detail page.
2. Remove the old label.
3. Apply the new one.

The scan history for that task point is continuous across the replacement (the QR encodes the same task-point ID as the old one).

## Things to watch for

### DON'T DELETE TAGS IN ACTIVE USE

Deletion removes the audit trail. Use deactivation unless the tag was truly created in error.

### WALK THE PLANT ONCE A YEAR

Physical tags wear out, fall off, get painted over. An annual walk-through with the skip report in hand catches most issues before technicians start noticing.

**SKIP RATE VARIES BY TASK TYPE**

Tasks with long acknowledgement flows (heavy safety procedures) see higher legitimate skip rates — someone scanned, then had to reschedule. Context the number against task complexity.

## Troubleshooting

Problem	Fix
Tag ID not in the list	The write may have failed — ask the Mapper to verify on mobile
Scan on mobile says "Tag deactivated"	Check status; if it should be active, reactivate
Skip report shows 100% skips for one technician	Check they have the correct role; they may not have permission to execute the task
Tag detail page shows wrong asset	Tag was rewritten — check the history tab

## Related topics

- [Scanning NFC tags \(mobile\)](#) — technician's side.
- [Writing NFC tags \(mobile\)](#) — mapper's side.
- [Asset hierarchy](#) — the hierarchy tags point into.
- [NFC is not working](#) — troubleshooting.
- [Mapper handbook](#)

# Remarks

Review observations and notes that technicians captured during task execution. The **Remarks** page is a searchable log — not a CRUD for reusable remark templates.

## REQUIRED ROLE

Any role with `task.view` (Technician's own remarks; Supervisor, Manager, Admin, Viewer see all).

## Overview

A **remark** is a free-text observation a technician adds during task execution — something they saw, a flag for follow-up, a piece of context that doesn't belong in the structured form fields.

The **Remarks** page consolidates every remark filed across the company into one searchable, date-filterable table. It's the place a Supervisor or Manager goes to answer "what did the team flag this week that I should know about?"

## Open the page

**Remarks** in the top-level sidebar.

## Layout

A search bar and date-range filter at the top; a table below.

Column	Meaning
<b>Date</b>	When the remark was captured (the task's execution time).
<b>Task Point</b>	The task-point name the remark is attached to.
<b>Location</b>	Breadcrumb showing where in the hierarchy (Site > Line > Section > Asset).
<b>Type</b>	The task type — Electrical, Lubrication, Mechanical, Production, Repair request.
<b>Assigned To</b>	The technician who filed the remark.
<b>Status</b>	The task's status at the time the remark was attached.
<b>Remarks</b>	The text of the remark itself.

An empty state shows **"No remarks found."** — which is what you'll see on a fresh installation until a technician files one.

## Filter

---

- **Search** — matches the remark text.
- **From / To dates** — narrow to a window.

Filters persist across sessions.

## Where remarks come from

---

Technicians file remarks from the mobile app during task execution:

1. The technician opens a task.
2. Fills in the form.
3. Optionally taps **Add remark** and types a note.
4. Submits the task.

The remark is attached to that task execution and appears on the Remarks page immediately (or on the next sync if offline).

## Using the Remarks page

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### Weekly review

Open the Remarks page, set the date range to the past 7 days, scan for patterns:

- Same task point coming up repeatedly → investigate asset condition.
- Same technician flagging a lot → they may be catching issues others miss (good!) or inflating noise (review).
- Recurring words or phrases ("leak", "vibration", "heat") → a systemic issue worth escalating.

### Investigation

"Did anyone see X around time Y?" — narrow the date range, search for a keyword, scan results.

## Audit

For compliance / maintenance review, filter to a specific time window and export (if your installation exposes export on this page; not all do). The Activity Log page may carry the same data for audit purposes.

## What Remarks is NOT

- **Not a CRUD for predefined remark text.** There's no "add remark" button on this page — remarks come from the field, not from config.
- **Not where you configure component-level hints.** Advisory text on components lives in [Components](#) (as a remark field on the component type, shown to technicians when they open a related task).
- **Not a comment thread.** Remarks are single observations, not conversations.

## Things to watch for

### DON'T CONFUSE FIELD-FILED REMARKS WITH COMPONENT REMARKS

Two different things share the name "remark":

- **Field remarks** (this page) — filed by technicians during execution; one per task.
- **Component remarks** (on [Components](#)) — editorial hints attached to a component type by a Mapper, shown advisably to technicians when they open any task on that component.

Both are called "remarks" in the platform. This page shows only the first kind.

### PAIR WITH THE ACTIVITY LOG FOR DEEPER INVESTIGATION

If a remark raises a question, open the [Activity Log](#) to see what else happened around the same time.

## Troubleshooting

Problem	Fix
"No remarks found"	Try a wider date range; confirm technicians are actually filing remarks
Remark text truncated	Click the row for the full remark (if row-click is enabled on your installation)
Missing a remark you filed	Confirm you submitted the task it was attached to — drafts don't surface here

## Related topics

- [Components](#) — component-level remarks (different concept, same name).

- [Dashboard](#) — the **Remarks** counter.
- [Activity Log](#) — broader audit trail.
- [Executing a task \(mobile\)](#) — where technicians file them.

# Products & Tools

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# Products & Tools

---

Maintain the catalogue of lubrication products, consumables, and tools your tasks reference.

## REQUIRED ROLE

Admin.

## Overview

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**Products & Tools** is the master catalogue of physical materials and equipment your plant uses during maintenance:

- **Products** — lubricants, greases, oils, cleaners, sealants, consumables.
- **Tools** — wrenches, torque wrenches, meggers, calibrated instruments, fixtures.

Lubrication tasks reference **products** on the "Product used" field. Repair tasks reference **products** (parts used) and **tools** (tools used). Consumption and tool-usage reports aggregate from these.

This menu entry expands into two submenus — one page each.

## Submenu

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- [Products](#) — the lubrication / consumable catalogue.
- [Tools](#) — the tool registry.

## Typical workflow

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When you start a new installation:

1. Import your existing product catalogue (from your purchasing system) as CSV into **Products**.
2. List the tools your technicians carry into **Tools**.
3. Configure the relevant lubrication tasks to reference specific products from the catalogue.
4. Configure repair tasks to optionally log parts and tools used.

Later, review quarterly:

- Deactivate products / tools no longer in use.
- Add newly introduced ones.

- Check the Consumption Report (if available) against your purchasing records.

## Related topics

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- [Products](#)
- [Tools](#)
- [Configuration options > Bulk operations](#)
- [Admin handbook](#)

# Products

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Maintain the catalogue of lubrication products and consumables that tasks reference.

## REQUIRED ROLE

Admin.

## Overview

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A **product** is a consumable that a technician uses during a maintenance task — grease, oil, cleaner, sealant, loctite, replacement gaskets, filter cartridges. Lubrication tasks expose a "Product used" field that draws from this catalogue.

## Open the page

---

**Products & Tools** → **Products** in the sidebar. You see a table:

Column	Meaning
Name	Manufacturer or internal product name.
Category	Grease / Oil / Cleaner / Sealant / Filter / Other.
Unit	The unit quantity is recorded in (ml, g, l, oz, pcs).
Compatible components	Optional — restricts which component types can use this product.
Active	On / off toggle.

## Create a product

---

1. **New product.**
2. Fill in:

Field	Notes
<b>Name</b>	Manufacturer name preferred ("Mobil SHC 624").
<b>Category</b>	Pick from Grease / Oil / Cleaner / Sealant / Filter / Other.
<b>Unit</b>	Pick from the Units master list. If the unit doesn't exist, add it there first.
<b>Part number</b> (optional)	Your purchasing identifier.
<b>Compatible components</b> (optional)	Leave blank for "any component". Add specific component types to restrict the dropdown on related tasks.
<b>Notes</b>	Internal notes for Admins. Not shown to technicians.

3. Save.

## Edit a product

---

Click a row. Change anything except the historical name — renames propagate everywhere going forward. Rows that already reference the old name in reports show the new name on refresh.

## Deactivate or delete

---

Prefer **deactivate**:

- Product disappears from mobile dropdowns.
- Historical task records retain the product reference for reports.
- Reversible by reactivating.

**Delete** only if the product was created in error and has no historical references. The system blocks deletion where references exist.

## Bulk import

---

CSV import for seeding from an existing catalogue:

1. **Products** → **Import**.
2. Download template.
3. Fill: `name, category, unit, part_number, active`.
4. Upload, preview, import.

Up to 5,000 rows per upload.

## Compatibility filtering

---

If you link a product to specific component types, the mobile app's dropdown narrows to only those products when a technician is executing a task on that component. This prevents technicians from accidentally picking the wrong grease for the wrong bearing.

Leave compatibility blank for universal products (cleaners, common solvents).

## Reports using products

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- **Consumption Report** (if enabled on your installation) — aggregates quantity per product, useful for reorder forecasting.
- **Task Reporting** — individual product/quantity entries per task.
- **Repair Request Report** — parts used per repair.

## Things to watch for

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### DON'T BLOAT THE CATALOGUE

A list of 500 products — most of which you don't actually stock — makes the mobile dropdown unusable. Prune aggressively. If your team has standardised on one grease per gearbox class, that's what the catalogue should reflect.

### MATCH PURCHASING SYSTEM EXACTLY

If your purchasing team uses part number `XYZ-1234`, use the same name and part number here. Reports then reconcile cleanly with invoices.

## Related topics

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- [Tools](#)
- [Products & Tools](#)
- [Executing a task \(mobile\)](#) — where technicians pick products.
- [Reports](#)
- [File formats](#) — CSV import details.

# Tools

---

Maintain the tool registry — the physical tools and instruments your technicians use for maintenance tasks.

## REQUIRED ROLE

Admin.

## Overview

---

The **Tools** catalogue lists the specific tools your technicians use in the field. Maintenance and Repair tasks can reference required tools so that a technician knows what to bring before they walk to an asset, and log tools used for cost / calibration tracking.

## Open the page

---

**Products & Tools → Tools.** The table shows:

Column	Meaning
Name	Descriptive ("Torque wrench 20–100 Nm", "Megger 500V").
Category	Hand / Power / Measurement / Specialty / Other.
Quantity	Optional — number available in your toolroom.
Calibration due	Optional — last/next calibration date for calibrated instruments.
Active	On / off toggle.

## Create a tool

---

1. **New tool.**
2. Fill in:

Field	Notes
<b>Name</b>	Specific enough to avoid ambiguity. "Torque wrench 20-100 Nm" beats "Torque wrench".
<b>Category</b>	Hand / Power / Measurement / Specialty / Other.
<b>Part number</b> (optional)	Internal or manufacturer reference.
<b>Quantity</b> (optional)	Inventory count if you track tools in/out.
<b>Calibration due</b> (optional)	For calibrated instruments.
<b>Notes</b>	Optional internal notes.

3. Save.

## Edit, deactivate, delete

---

Same pattern as [Products](#). Deactivate for retired tools; delete only for mistakes with no history.

## Calibration tracking

---

For calibrated instruments (torque wrenches, meggers, multimeters, pressure gauges):

- Set **Calibration due** when you add the tool or re-calibrate.
- The system flags overdue calibrations on the tool's detail page.
- Some installations expose a **Calibration Report** listing all tools by calibration status.

Use this as a light inventory check, not as a safety-critical calibration management system — for regulated environments, a dedicated calibration platform is still recommended.

## Tools referenced on tasks

---

A task can list "Required tools" that display to the technician in the task summary:

1. Edit the task.
2. In the **Tools** field, multi-select from the catalogue.
3. Save.

The technician sees the list on the mobile app's task summary screen before they start — they know what to bring without a back-and-forth radio call.

## Things to watch for

---

### **SPLIT AMBIGUOUS TOOLS INTO SPECIFIC ENTRIES**

"Wrench" is useless; "15 mm combination spanner" is useful. Split by size, style, or drive where it matters.

### **CALIBRATION DATES ARE ADVISORY**

The platform won't block a task because a tool is out-of-calibration. It surfaces the fact; your team has to act.

## Related topics

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- [Products](#)
- [Products & Tools](#)
- [Master data \(web portal\)](#) — overview of all reference tables.
- [File formats](#) — CSV import format.

# Task Planning

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# Assign Task

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Distribute unassigned tasks to technicians on the **Assign Task** page — select tasks in the tree, tick technicians on the right, click **Assign**.

## REQUIRED ROLE

Supervisor or Admin (requires `task.assign`).

## Overview

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The **Assign Task** page is where Supervisors and Admins distribute the day's unassigned work. It's a three-panel layout:

- **Left:** a hierarchical tree of unassigned tasks, grouped by line → section → asset → task point.
- **Right:** the list of technicians with current workload counts.
- **Bottom-center:** the Assign / Unassign action bar.

You **check** tasks on the left and technicians on the right, then click **Assign**. The workflow is checkbox-driven — not drag-and-drop.

## Prerequisites

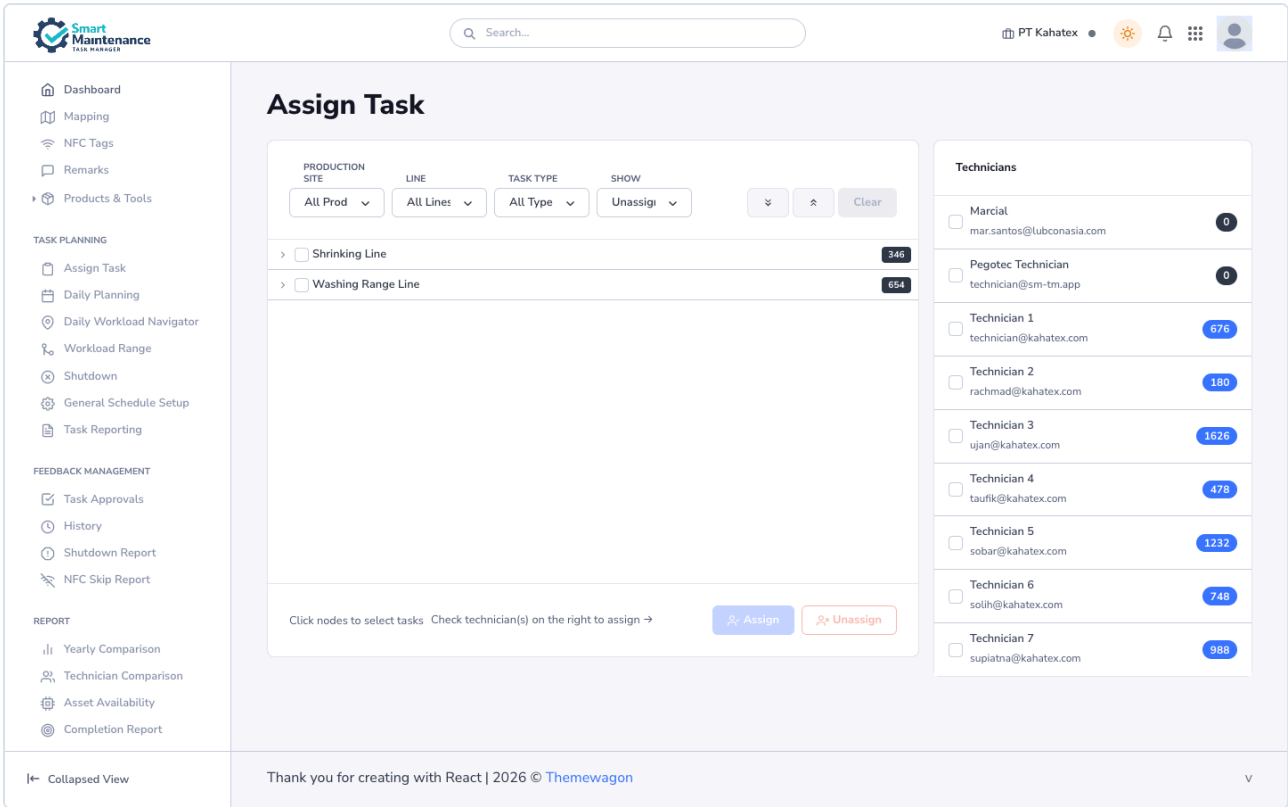
---

- You have the Supervisor or Admin role.
- At least one task is unassigned (generated by a schedule or created ad-hoc by a Mapper).
- At least one technician exists.

## Open the page

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**Task Planning** → **Assign Task** in the sidebar.



## Screen layout

Area	What it does
Filter bar (top)	Narrow the task tree by Production Site, Line, Task Type, and Show (Unassigned Only / All Tasks).
Task tree (left)	Lines → sections → assets → task points. Each node has a checkbox and the unassigned-task count on the right. Click the chevron to expand; click the node name to select.
Toolbar (right of filters)	<b>Expand all / Collapse all / Clear</b> selection.
Technicians panel (right)	Each technician has a checkbox, their name + email, and a workload badge (current assigned count).
Action bar (bottom-center)	<b>Assign</b> and <b>Unassign</b> buttons. Both stay disabled until you've selected both a task set and at least one technician.

## Steps

### 1. Filter the tree

Filters at the top narrow the task tree:

- **Production Site** — pick one or leave on **All Production Sites**.
- **Line** — populates based on the selected site.

- **Task Type** — choose from **Electrical**, **Lubrication**, **Mechanical**, **Production**, or **Repair request**. Default is **All Types**.
- **Show** — **Unassigned Only** (default) hides assigned tasks; **All Tasks** shows every task in scope.

## 2. Select tasks

- **Expand** a line by clicking its chevron to see sections → assets → task points.
- **Tick the checkbox** on any node to select it and all its descendants.
- Partially-selected parents show a dash instead of a tick.
- Use **Expand all** / **Collapse all** in the toolbar to zoom in or out.

You can assign at any level — a line-level tick selects every task under it; a task-point-level tick selects just that one.

## 3. Tick one or more technicians

The Technicians panel on the right shows every active technician with their current workload count. Tick the checkbox of each technician you want to assign to.

What happens when you tick multiple technicians depends on the company **Multi-Technician Assignment** flag (in [Company Setting → Features](#)):

- **Flag off (default)** — the selected tasks are **split** evenly across the ticked technicians, round-robin. Tick exactly one to concentrate the load.
- **Flag on** — every selected task is **duplicated** across every ticked technician, so multiple people are assigned to each task simultaneously.

If you're not sure which mode your company uses, ask an Admin.

## 4. Click Assign

The **Assign** button in the bottom-center activates when both a task selection and at least one technician are picked. Click it.

What happens next:

- Selected tasks are assigned. The tree refreshes; assigned tasks disappear from the **Unassigned Only** view.
- The technician's workload badge increments.
- The affected technicians receive a push notification on their mobile app (within seconds if online, next sync cycle otherwise).

## 5. Verify

- The tree reflects the new state — counts on the parent nodes drop.
- The technician panel's workload numbers update.

## Unassigning

---

To pull tasks back from a technician:

1. In the **Show** filter, switch to **All Tasks** so assigned tasks appear in the tree.
2. Tick the tasks you want to pull back.
3. Tick the technician currently holding them.
4. Click **Unassign**.

The tasks return to the unassigned pool.

## Patterns

---

### Morning bulk distribution

1. Filter by **Production Site = (your site)**.
2. **Expand all**.
3. Tick the lines or sections you want to distribute.
4. Tick the technicians who are on shift.
5. **Assign**.

### Single-task dispatch

1. Filter by **Task Type** to narrow.
2. Drill to the specific task point.
3. Tick only that task point.
4. Tick one technician.
5. **Assign**.

### Reassigning a sick technician's full load

1. Switch **Show** to **All Tasks**.
2. Filter the tree down to that technician's unfinished work (often easier from the [Daily Planning](#) calendar).

3. Tick everything.
4. Tick the absent technician → **Unassign**.
5. Tick the replacement technician → **Assign** (with the tasks still selected).

## Task type names

The platform uses these exact task-type labels in the dropdown:

Label	Typical use
<b>Electrical</b>	Voltage, current, insulation, thermal.
<b>Lubrication</b>	Grease, oil, sealant application.
<b>Mechanical</b>	Inspection, adjustment, cleaning. (Previously called "Maintenance" in some legacy contexts.)
<b>Production</b>	Output readings, run-hour captures.
<b>Repair request</b>	Resolution of a reported fault.

See [Task types](#) for the form fields per type.

## Things to watch for

### MULTI-SELECT BEHAVIOUR DEPENDS ON A COMPANY FLAG

With **Multi-Technician Assignment** off (default): ticking three technicians distributes tasks round-robin. With the flag on: the same tasks are duplicated across all three. Check the flag in [Company Setting](#) → [Features](#) if you're unsure.

### KEEP AN EYE ON WORKLOAD BADGES

The workload number next to each technician is a real-time load indicator. Big imbalances (one technician at 1000 while another is at 50) mean rebalancing is overdue.

### OFFLINE TECHNICIANS STILL GET THE ASSIGNMENT

A technician who's offline when you click Assign receives the tasks on their next sync. The assignment itself succeeds immediately server-side.

## Result

After clicking **Assign**:

- Tasks appear in each technician's mobile task list.
- Technicians receive push notifications.
- Assignments show in the [Dashboard](#), [Daily Planning](#), and [Daily Workload Navigator](#).

- Approvals follow once technicians submit — see [Task Approvals](#).

## Troubleshooting

Problem	Fix
Assign button stays disabled	You need both tasks selected and at least one technician ticked
Technicians list is empty	Confirm active users with the Technician role exist in your company
Task I expect to see isn't in the tree	Check filters; switch <b>Show</b> to <b>All Tasks</b>
Workload badge looks wrong	Refresh — WebSocket updates may lag briefly
Task vanished after assignment	Expected — <b>Unassigned Only</b> hides assigned tasks; switch <b>Show</b> to see them

## Related topics

- [Task Approvals](#) — the next step after a technician completes.
- [Daily Planning](#) — calendar view of the same tasks by day.
- [Daily Workload Navigator](#) — hierarchy view of today's work.
- [General Schedule Setup](#) — how tasks appear in the unassigned pool.
- [Dashboard](#) — assignment metrics at a glance.
- [Task types](#).
- [Supervisor handbook](#).

# Daily Planning

A calendar view of every scheduled task, with per-day event counts and filtering by technician or production site.

## REQUIRED ROLE

Supervisor, Admin, or Manager. Viewer has read-only access.

## Overview

**Daily Planning** (page title: **Calendar**) is the calendar layer on top of scheduling. It shows every task instance plotted on its due date. Where **Assign Task** is about distributing unassigned work and **Daily Workload Navigator** answers "where in the plant is today's work?", Daily Planning answers "**what's happening on which day?**"

## Open Daily Planning

**Task Planning** → **Daily Planning** in the sidebar (URL `/calendar`).

The screenshot displays the 'Calendar' interface in the Smart Maintenance Task Manager. The interface includes a sidebar with navigation options such as Dashboard, Mapping, NFC Tags, Remarks, Products & Tools, TASK PLANNING (Assign Task, Daily Planning, Daily Workload Navigator, Workload Range, Shutdown, General Schedule Setup, Task Reporting), FEEDBACK MANAGEMENT (Task Approvals, History, Shutdown Report, NFC Skip Report), and REPORT (Yearly Comparison, Technician Comparison, Asset Availability, Completion Report). The main area shows a calendar for April 2026, with filters for All Technicians, All Production Sites, All Lines, and All Assets. The calendar grid shows tasks plotted on specific dates, such as 'Main Pump Motc' on 30th, 'Blower Motor Te' on 31st, 'Adjusting Screw' on 1st, and 'Banana Roller Bi' on 6th. The interface also includes a search bar, user profile, and notification icons at the top.

## Layout

- **Filters** (top-right of page): Technician, Production Site, Line, Asset. Line and Asset cascade from the Production Site selection.
- **Month-nav row:** ◀ **Today** ▶ to step by month, plus the big month heading (e.g. "April 2026") in the centre.
- **View toggle** (top-right of the calendar itself): **Month / Week / List**.
- **Grid:** days as cells; each cell shows the date number and up to four event names. Days with more than four show a `+N more` link.

## Switch view

Three zoom levels:

- **Month** (default) — seven columns, five or six rows. Up to four events visible per day, with `+N more` for overflow.
- **Week** — one week at a time with more events visible per day.
- **List** — a flat chronological list of events across the current range.

There's no separate "Day" or "Agenda" view.

## Filter

Filter	Effect
<b>Technician</b>	Show only events assigned to one person, or leave as "All Technicians".
<b>Production Site</b>	Narrow to one site. Enables the Line filter.
<b>Line</b>	Cascades from Production Site. Enables the Asset filter.
<b>Asset</b>	Cascades from Line.

Filters persist across sessions.

## Event cards

Each event in a day cell shows:

- A coloured dot.
- The task name (truncated if long).

Clicking an event opens the task detail. Clicking `+N more` expands the day's full event list.

## Typical supervisor morning

---

1. Open Daily Planning.
2. Scan the current week for load balance — are all days comparable, or is there a Monday pile-up?
3. Use the Technician filter to check one person's schedule at a time.
4. Jump to [Assign Task](#) if something needs (re)assigning.

## Things to watch for

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### **DAILY PLANNING SHOWS SCHEDULED TASKS; ASSIGN TASK SHOWS UNASSIGNED ONES**

These are complementary. Daily Planning is "what's the week look like"; Assign Task is "here are new tasks, distribute them". Use both.

### **EVENTS ARE READ-ONLY FROM THE CALENDAR**

Clicking an event opens details; the calendar itself doesn't re-schedule by drag. To reschedule or reassign, open the task detail or go to [Assign Task](#).

## Related topics

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- [General Schedule Setup](#) — the rules that populate this calendar.
- [Assign Task](#) — for unassigned / new tasks.
- [Daily Workload Navigator](#) — line-card view of today's work.
- [Workload Range](#) — per-technician workload over a range.
- [Supervisor handbook](#)

# Daily Workload Navigator

---

A day-focused dashboard of production-line cards with task counts, status indicators, and a **Create Work Order** shortcut.

## REQUIRED ROLE

Supervisor, Admin, Manager, Mapper, or Viewer (with `task.view`).

## Overview

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**Daily Workload Navigator** is the "where in the plant is today's work?" view. It focuses on a **single day** at a time and shows each production line as a card with task totals, done-so-far counters, a progress bar, and per-task-type indicators.

Use it for:

- Start-of-shift check — which lines have load today?
- Spotting concentration — is one line oversubscribed while others are empty?
- Quickly creating ad-hoc work orders.

## Open the page

---

**Task Planning** → **Daily Workload Navigator**. URL: `/flowchart/mappingview`.

The screenshot shows the 'Daily Workload Navigator' interface. At the top, there is a search bar and user information (PT Kahatex). The main content area is divided into a sidebar and a main panel. The sidebar contains navigation links for Dashboard, Mapping, NFC Tags, Remarks, Products & Tools, Task Planning (Assign Task, Daily Planning, Daily Workload Navigator, Workload Range, Shutdown, General Schedule Setup, Task Reporting), Feedback Management (Task Approvals, History, Shutdown Report, NFC Skip Report), and Report (Yearly Comparison, Technician Comparison, Asset Availability, Completion Report). The main panel features a 'Daily Workload Navigator' title, a 'Create Work Order' button, and filters for Technician (All) and Date (24.04.2026). A summary row displays six counters: Scheduled Tasks (24), Overdue Tasks (0), Lubrication (24), Mechanical (0), Electrical (0), and Production (0). Below this is a grid of 'Lines' cards, each representing a production line with a name, a progress bar, and 'Total' / 'Done' counts. A 'LUB 24' badge is visible on the 'Washing Range Line' card.

## Layout

- **Top bar:**
  - **Create Work Order** button (top-right).
- **Filter / date row:** Technician dropdown, Date picker, **◀ Today ▶** buttons to step by day.
- **Summary row:** six counters — **Scheduled Tasks, Overdue Tasks**, plus per-task-type: **Lubrication, Mechanical, Electrical, Production**.
- **Breadcrumb: Lines** (indicates you're at the line level; clicking a line drills deeper).
- **Line cards:** one card per production line, each showing:
  - Line name.
  - Total / Done counts.
  - Progress bar.
  - Per-task-type mini-badges (e.g. **LUB 24**) for days where that line has work.

## Steps

### 1. Pick the day

Use the date picker or the **◀ Today ▶** buttons to jump between days.

## 2. Filter by technician (optional)

Pick one technician from the dropdown to see only cards with that technician's work on the selected day.

## 3. Scan the summary row

Six counters at a glance tell you:

- How many tasks are scheduled today.
- How many are overdue.
- How the day splits across Lubrication, Mechanical, Electrical, Production.

## 4. Drill into a line

Click any line card to see the assets / sections / task points below it with their own counts.

## 5. Create a one-off work order

The **Create Work Order** button (top-right) opens an ad-hoc task creation form — useful when something comes up that the schedule didn't cover.

## How it differs from other views

Question	Use
"What's happening by time / calendar?"	<a href="#">Daily Planning</a>
"What's happening <b>where</b> in the plant today?"	<b>Daily Workload Navigator</b>
"What's the longer-range load per technician?"	<a href="#">Workload Range</a>
"What tasks are unassigned?"	<a href="#">Assign Task</a>

They're complementary — power users open multiple tabs during planning.

## Things to watch for

### CREATE WORK ORDER CREATES AN AD-HOC TASK, NOT A RECURRING ONE

The button is for one-off work. To create a recurring task, edit the schedule in [General Schedule Setup](#).

### USE THE DATE PICKER FOR NON-TODAY VIEWS

To see tomorrow's load, pick tomorrow's date. The page defaults to today but doesn't lock to it.

## Related topics

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- [Daily Planning](#) — calendar view of the same data.
- [Workload Range](#) — per-technician view over a date range.
- [Assign Task](#) — for unassigned work.
- [Mapping](#) — the hierarchy the lines belong to.
- [Supervisor handbook](#)

# Workload Range

---

A per-technician workload table across a date range, with drill-down into each technician's work.

## REQUIRED ROLE

Supervisor, Admin, Manager, Mapper, or Viewer (with `task.view`).

## Overview

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**Workload Range** (page title: **Workload Flowchart**) is the longer-range view of team workload. Where [Daily Workload Navigator](#) shows where today's work sits in the plant, Workload Range shows **each technician's total load over a date range** — how many tasks, of which types, completed / overdue / pending.

Use it for:

- Weekly / monthly load review.
- Spotting overloaded vs underloaded technicians.
- Pre-shift planning ("how's next week shaped for each person?").

## Open the page

---

**Task Planning** → **Workload Range** in the sidebar. URL: `/flowchart`.

**Workload Flowchart**

TECHNICIAN: All | FROM: dd.mm.yyyy | TO: dd.mm.yyyy | < Today > | x All

Technicians

TECHNICIAN	TYPES	TOTAL	COMPLETED	OVERDUE	PENDING	PROGRESS
Marcial		0	0	0	0	
Technician 1	LUB 4738 / MEC 8610	19678	6390	1383	11965	32%
Technician 2	LUB 783 / MEC 1122	3861	1956	180	1725	51%
Technician 3	LUB 13821 / MEC 9720	35764	12223	2263	21278	34%
Technician 4	LUB 4844 / MEC 2534	10813	3435	913	6465	32%
Technician 5	LUB 8355 / MEC 7514	24953	9084	1735	14134	36%
Technician 6	LUB 3027 / MEC 4178	13425	6220	304	6901	46%
Technician 7	LUB 2310 / MEC 6253	16599	8026	633	7740	48%
Pegotec Technician		0	0	0	0	

## Layout

- **Filters:** Technician, From date, To date, ◀ **Today** ▶ (day stepper), **All** (reset).
- **Breadcrumb:** **Technicians** (indicates you're at the technician level).
- **Table:** one row per technician, with columns:

Column	Meaning
Technician	Name.
Types	Per-task-type counts (e.g. LUB 4738 / MEC 8610).
Total	Total tasks in the date range.
Completed	Completed count.
Overdue	Overdue count.
Pending	Pending count (not started, not completed, not overdue).
Progress	Progress bar + percentage.
Drill into ...	Arrow button to drill from technician → line → asset.

## Steps

---

### 1. Pick a date range

Use the **From** and **To** date fields, or step by day with ◀ **Today** ▶. Click **All** to clear filters back to default.

### 2. Scan the table

Sort or filter by any column. Look for:

- **High overdue counts** — which technicians have a backlog?
- **Low completion progress** — which technicians are behind?
- **Type imbalance** — is one person doing nothing but lubrication while others do mechanical?

### 3. Drill into a technician

Click the drill-down arrow in the rightmost column to see that technician's work broken down by line, asset, or task point.

### 4. Act

- Reassign work via [Assign Task](#).
- Adjust schedules via [General Schedule Setup](#).
- Flag coaching moments via performance review (the Workload Range is the operational half of the story; the [Technician Comparison report](#) is the analytical half).

## How it differs from other views

---

Question	Use
"What's happening by time / calendar?"	<a href="#">Daily Planning</a>
"Where in the plant is today's work?"	<a href="#">Daily Workload Navigator</a>
"How are technicians loaded over a range?"	<b>Workload Range</b> (this page)
"Who's performing well / poorly across months?"	<a href="#">Technician Comparison report</a>

## Things to watch for

---

### USE THE DRILL-DOWN TO FIND PATTERNS

The table surfaces totals; drilling down surfaces causes. A technician with a high overdue count — drilling in often shows it's one specific line or task class, not broad.

### DATE RANGE IS TASK-INSTANCE-BASED

The counts are across task instances scheduled within the range — not tasks *completed* within the range. A task scheduled for May 1 and completed late on May 5 appears in a range that includes May 1 but completion is under Completed.

## Related topics

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- [Daily Planning](#)
- [Daily Workload Navigator](#)
- [Assign Task](#) — reassignment.
- [Reports > Technician Comparison](#) — analytical twin.
- [Supervisor handbook](#)
- [Manager handbook](#)

# Shutdowns

Review reported equipment shutdowns, log planned shutdowns (maintenance windows), and analyse shutdown patterns.

## REQUIRED ROLE

Supervisor or Admin can create, edit, and resolve shutdowns. Manager and Viewer have read-only access.

## Overview

The **Shutdowns** page is where every reported or planned shutdown lives until it's resolved, and where you see historical shutdown data after. Technicians raise shutdowns from mobile; supervisors triage, act, and close them.

Shutdown data drives the **Shutdown Report**, **Asset Availability**, and **OEE Report** — it's the single most important input for availability and downtime metrics.

## Prerequisites

- Shutdown reasons have been configured in [Master data](#).
- You have the appropriate role (Supervisor / Admin for writes, Manager / Viewer for reads).

## Open the shutdowns page

**Shutdowns** in the sidebar. The list shows:

Column	Meaning
#	Row number.
Line	Affected production line.
Asset	Affected asset.
Reason	From master data.
From	Start time.
To	End time (blank if still open).
Status	Open / Resolved.

Top-right controls: a **Show history** checkbox (toggles between open-only and all shutdowns) and an **Add Shutdown** button.

Reported-by, resolved-by, and priority details appear on the shutdown's detail page after you click through a row — they're not columns in the top-level list.

The default view shows **Open shutdowns** first. Toggle filters to see resolved or specific lines.

## Triage an incoming shutdown

---

When a technician reports a shutdown from mobile:

1. You receive a push notification (if you have the category on).
2. The shutdown appears at the top of the list with status **Open** and a red indicator.
3. A Critical priority shutdown also flashes the affected line on the Dashboard.

### Review quickly

Click the row. You see:

- Reason and description from the reporter.
- Photos (if attached).
- Safety concerns (if flagged).
- Start time.
- Affected asset / line.

### Decide the next action

- **Dispatch a technician** if nobody's on it. Create an assignment from the shutdown's **Actions** → **Assign repair**.
- **Cross-link to a repair request** if the reporter raised one alongside.
- **Escalate** if Critical — alert the safety officer, plant manager, or whoever your playbook says.
- **Update the shutdown** with any supervisor-side context.

### Mark resolved when production resumes

1. Open the shutdown.
2. Click **Resolve**.
3. Fill in:
  - **End time** — when production actually resumed.

- **Resolution notes** — brief summary of what was done.
- **Resolved by** — the person or team credited with the fix (auto-pre-fills to you).

4. Save.

The status changes to **Resolved** and the shutdown moves to historical view.

## Log a planned shutdown

---

Ahead of scheduled maintenance windows:

1. **New shutdown.**
2. Select the line or asset(s) affected.
3. Pick a shutdown reason: **Planned maintenance** (or whatever your master data lists).
4. Set **Start** and **End** to the planned window.
5. Tick **Planned**.
6. Save.

A planned shutdown tells reports to exclude the window from unplanned-downtime metrics. If the actual window runs longer, update the end time post-facto.

## Edit an open shutdown

---

Open a shutdown → **Edit**. You can change every field except **Reported by** (audit integrity).

Changes are logged — anyone who looks at the history sees who edited what and when.

## Shutdown-to-repair-request linkage

---

If the technician raised a repair request for the same incident, it's auto-linked if:

- Same asset.
- Submitted within a short window of each other.

You can also link manually: open the shutdown → **Link repair request** → pick the relevant one.

Linked records cross-reference in reports.

## Filtering and searching

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The filter bar lets you scope by:

- **Status** — Open / Resolved / All.
- **Priority.**
- **Line / Asset.**
- **Date range** — for historical analysis.
- **Planned / Unplanned.**
- **Reason** (from master data).

Use the date range plus line filter to ask "how much downtime did Line 3 have last month?".

## Bulk actions

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Rare but occasionally useful:

- **Resolve selected** — batch-close old open shutdowns that should have been closed earlier.
- **Export selected** — CSV for external analysis.

## Reports driven by this data

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- [Shutdown Report](#) — incidents by reason, duration, frequency.
- [Asset Availability](#) — uptime % per asset, computed as (total time – open-shutdown time) / total time.
- [OEE Report](#) — availability component comes directly from shutdown durations.

Because reports depend on accurate start / end times, keep shutdowns up to date. A shutdown left "open" for days because nobody updated its end time destroys availability metrics for that asset.

## Things to watch for

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### CLOSE SHUTDOWNS PROMPTLY

An open shutdown counts as downtime. If you forget to mark resolved, availability numbers collapse. Build a habit of checking the **Open shutdowns** list at shift end.

### PLAN BEFORE YOU STOP

Any shutdown you can schedule in advance should be logged as Planned before it happens. Retrofitting "it was planned" after the fact damages data integrity.

## ESCALATION ISN'T AUTOMATIC

A Critical shutdown notifies via push but doesn't page your on-call rotation. Set that up outside the platform (PagerDuty / Opsgenie / phone tree) and reference the shutdown record in your playbook.

## Common patterns

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### Daily opener

1. Open **Shutdowns**.
2. Sort by start time descending.
3. Any open shutdowns from the previous shift that should have been closed — close them now, or ask the incoming shift to.
4. Scan new ones and triage.

### Weekly review

1. Filter by date range = last 7 days, **Resolved**.
2. Sort by duration descending — the longest downtime events.
3. Look for patterns:
  - Same reason repeating → is there a standing issue?
  - Same asset recurring → asset-level problem?
  - Same technician resolving → load concentrated?

### Post-incident learning

After a significant shutdown:

1. Document the timeline in the shutdown's resolution notes.
2. Link to any repair requests generated from it.
3. Share summary in your next team meeting — cross-referencing the shutdown by ID makes context easy to retrieve.

## Troubleshooting

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Problem	Fix
Shutdown appears twice	A technician submitted twice; merge by resolving the duplicate with note "duplicate of #N"
OEE report drops unexpectedly	Check for an open shutdown someone forgot to close
Push alert didn't arrive	Confirm your notification category is on; see <a href="#">Notifications</a>
Can't resolve — button greyed out	End time missing; fill it in first

## Related topics

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- [Reporting a shutdown \(mobile\)](#) — the technician's side.
- [Repair requests \(mobile\)](#) — often filed alongside.
- [Master data > Shutdown reasons](#) — where the reason dropdown comes from.
- [Reports](#) — downstream analytics.
- [Dashboard](#) — open-shutdown count at a glance.
- [Supervisor handbook](#)

# General Schedule Setup

---

Configure how often tasks recur — per line, asset, or section — using a cascading drill-down.

## REQUIRED ROLE

Mapper or Admin. Supervisor and Viewer have read-only access.

## Overview

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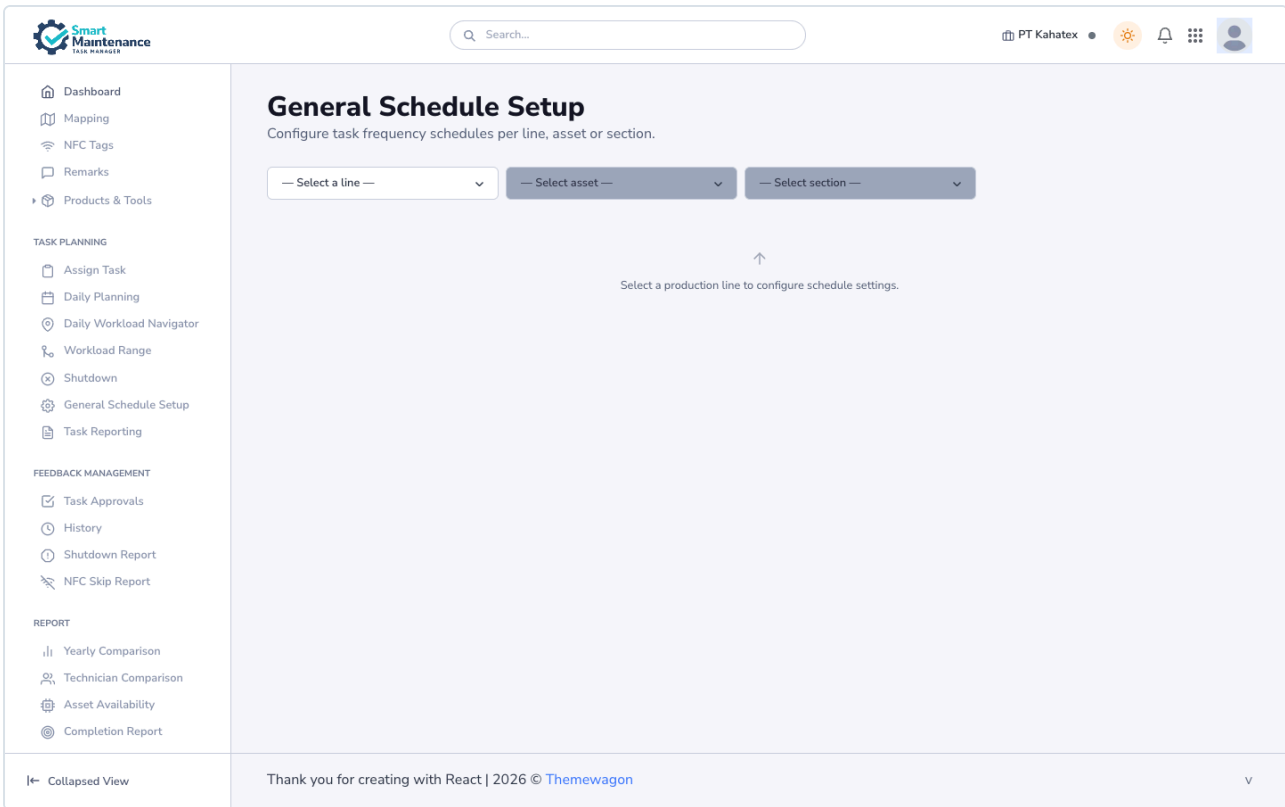
**General Schedule Setup** is where the scheduler's frequency is configured. Unlike a single flat list of schedules, the page uses a **cascading drill-down**: pick a Line → pick an Asset → pick a Section → configure. Each level scopes the schedules you see and edit to that part of the hierarchy.

The scheduler runs in the background and generates **task instances** on the calendar using the frequencies configured here. The generated instances show up in [Daily Planning](#), [Assign Task](#), and all the reports.

## Open the page

---

**Task Planning → General Schedule Setup.** URL: `/schedule-settings`.



The screenshot shows the 'General Schedule Setup' page in the Smart Maintenance Task Manager. The page title is 'General Schedule Setup' with the subtitle 'Configure task frequency schedules per line, asset or section.' Below the title are three cascading dropdown menus: '— Select a line —', '— Select asset —', and '— Select section —'. Below these dropdowns is a message: 'Select a production line to configure schedule settings.' The sidebar on the left contains navigation options under 'TASK PLANNING' (Assign Task, Daily Planning, Daily Workload Navigator, Workload Range, Shutdown, General Schedule Setup, Task Reporting), 'FEEDBACK MANAGEMENT' (Task Approvals, History, Shutdown Report, NFC Skip Report), and 'REPORT' (Yearly Comparison, Technician Comparison, Asset Availability, Completion Report). The footer of the page shows 'Thank you for creating with React | 2026 © Themewagon'.

## Layout

Three cascading dropdowns at the top:

- **Select a line** — populated with your company's production lines.
- **Select asset** — disabled until you pick a line; then shows assets under that line.
- **Select section** — disabled until you pick an asset; then shows sections on that asset.

Below the dropdowns the page shows an empty state until a selection is made: *"Select a production line to configure schedule settings."*

## Steps

### 1. Pick the scope

Work top-down:

1. Pick a **Line** from the first dropdown. The Asset dropdown enables.
2. Optionally pick an **Asset** to narrow further. The Section dropdown enables.
3. Optionally pick a **Section** to narrow again.

Pick at any level — you don't have to drill all the way. Line-level changes cascade to every asset and section under it unless overridden more specifically.

## 2. Configure frequencies

Once you've picked a scope, the page displays the schedule configuration for that scope. Typical options include:

- **Daily / Weekly / Monthly / Yearly** frequency.
- Day of week for weekly (Mon, Tue, ...).
- Day of month for monthly.
- Time of day.
- Run-hour-based triggers for Production-style tasks.

The exact fields shown depend on the scope you selected and which task types apply at that level.

## 3. Save

Save the configuration for the current scope. The scheduler picks up the new rule on its next run (within a few minutes) and starts generating instances accordingly.

## Override pattern

---

Configurations on a more specific scope override the broader scope:

- A Line-level weekly frequency applies to every asset/section under the line by default.
- An Asset-level configuration overrides the Line-level for that specific asset.
- A Section-level configuration overrides the Asset-level for that specific section.

This lets you set a sensible default at Line level, then adjust individual assets that need different treatment without fragmenting the whole setup.

## Things to watch for

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### SCHEDULE CHANGES DON'T RETROACTIVELY MODIFY EXISTING INSTANCES

Editing a frequency affects only **future** task generations. Instances already created retain the parameters they had at generation time. If you need to reshape existing tasks, edit or delete them individually.

### PLAN FROM THE TOP DOWN

Configure Line-level defaults first, then adjust specific assets and sections that need exceptions. Starting from the bottom means many individual edits that could have been one broader rule.

## **RUN-HOUR SCHEDULES NEED PRODUCTION TASKS**

Run-hour-based triggers rely on run-hour readings captured by Production-type tasks. Without regular Production task execution on an asset, run-hour schedules won't fire.

## **Related topics**

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- [Daily Planning](#) — the calendar view of what's been generated.
- [Assign Task](#) — assigning generated instances to technicians.
- [Task types](#) — which task types support which schedule styles.
- [Asset hierarchy](#) — the structure the scheduler scopes by.
- [Mapper handbook](#)

# Reports

---

Run, view, and export the platform's ten core reports. Every report supports a date-range filter, column sorting, and CSV / PDF export.

## REQUIRED ROLE

Supervisor, Manager, Admin, or Viewer — all with read and export access.

## Overview

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Reports turn the stream of task executions, repair requests, and shutdowns into answers:

- Are we keeping up with the plan?
- Who's struggling on the team?
- Which assets are costing us the most?
- Are we getting faster or slower?

The reports page lives under **Reports** in the sidebar. Each report has its own sub-page with filters tailored to its content.

## Common controls

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Every report shares a few controls:

- **Date range** — today / yesterday / last 7 days / this month / last month / custom. Your last-used range persists across sessions.
- **Filters** — site, line, technician, status, priority. Varies by report.
- **Column sort** — click any column header.
- **Pagination** — 25 / 50 / 100 / 250 rows per page.
- **Export** — CSV or PDF. The export reflects your current filter state.

## The ten reports

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### 1. Task Reporting

A drill-down operational report, starting at **Lines** and letting you drill to Assets → Sections → Task points → individual task instances.

The page has a **From / To** date range, a **Print** button (top-right), and a row of **counter tabs** across the top that filter the table below:

- **All Tasks** · **Overdue** · **Repair** · **Remarks** · **Notes** · **Alerts** · **NFC Skipped**

Each tab shows its current count and switches the table to that slice.

The table columns (at the Line level) are: **Line / Assets / Total / Completed / In Progress / Overdue / Drill-into**. Clicking the drill arrow on a row narrows you to that line's assets.

LINE	ASSETS	TOTAL	COMPLETED	IN PROGRESS	OVERDUE
Dyeing Line & Lawer	38	19740	6339	0	1406
Cool Pad Batch Line	5	3861	1956	0	180
Washing Range Line	11	71556	24742	0	4823
Stenter Line	32	16698	8026	0	884
Calendaring Line	7	13425	6220	0	304
Shuilding Line	7	0	0	0	0
Test	0	0	0	0	0
Test 1	0	0	0	0	0
Shrinking Line	3	0	0	0	0
Washing Range Line	3	0	0	0	0
Digital Printing Line	11	0	0	0	0
Steamer Line	6	0	0	0	0

**Use it for:** operational drill-down on where work is happening and where it's stuck. Less a raw log than a roll-up you navigate.

## 2. Task History

Historical view with search and filter. Includes drafts and rejected tasks that Task Reporting omits.

**Use it for:** "what happened to that task last Tuesday?" style investigations.

## 3. Shutdown Report

One row per shutdown event.

Column	Meaning
Start	Shutdown start time.
End	End time (blank if still active).
Duration	End minus start, in hours.
Line	Affected production line.
Reason	From master data shutdown-reason list.
Reported by	Technician who filed the report.
Resolved by	Who marked it resolved.

**Use it for:** incident analysis; repeat-offender tracking; OEE-driver decomposition.

## 4. Yearly Report

Annual aggregated metrics. One row per month, columns for every major metric.

**Use it for:** board / exec summaries; year-over-year comparisons; capital planning.

## 5. Technician Comparison

One row per technician. Columns:

- Tasks assigned.
- Tasks completed.
- Completion rate.
- Average time-to-completion.
- Rejection rate.
- Overdue count.

**Use it for:** performance reviews; identifying coaching opportunities; rebalancing workload.

### CONTEXT MATTERS

A technician with a low completion rate may be covering the hardest assets. Always read the numbers alongside the shift mix and asset complexity.

## 6. Asset Availability

Uptime percentage and downtime hours per asset, over the selected range.

**Use it for:** identifying the assets that drag your OEE down; capital replacement decisions.

## 7. OEE Report

Overall Equipment Effectiveness — the combined **Availability × Performance × Quality** metric used in manufacturing.

- **Availability** — uptime / planned production time.
- **Performance** — actual output / theoretical maximum output (if your tasks capture output).
- **Quality** — good units / total units (if captured).

**Use it for:** executive-level performance tracking; cross-site / cross-line comparisons.

### OEE NEEDS PRODUCTION TASKS

The Performance and Quality components depend on Production task executions that capture output numbers. If your team doesn't run Production tasks, the OEE report falls back to Availability only.

## 8. Completion Report

Completion rate broken down by line, asset, or technician.

**Use it for:** quick "are we on plan?" checks; spotting under-performing segments.

## 9. Repair Request Report

One row per repair request.

Column	Meaning
Submitted	When the technician raised it.
Asset	Affected asset.
Failure type	From master data.
Priority	Low / Medium / High / Critical.
Status	Submitted / Acknowledged / In progress / Resolved / Closed.
Resolution time	Time from submitted to resolved.
Parts used	If the resolution captured parts.

**Use it for:** failure-pattern analysis; cost attribution; backlog tracking.

## 10. Flowchart

A visual process-flowchart display of the asset hierarchy. Less a report than a navigation aid for users who think in pictures rather than trees.

**Use it for:** explaining the plant layout to visitors; annotating review documents.

## Exporting

Every report supports three export formats:

- **CSV** — raw tabular data. UTF-8, comma-delimited, `\n` line terminator.
- **PDF** — print-ready with company logo, date range, and active filters in the header.
- **XLSX** — formatted Excel workbook with coloured status cells, frozen headers, and multiple sheets for multi-dimension reports (e.g. the OEE report ships separate sheets per line).

The export reflects **your current filter state**. Re-apply filters and re-export for a different slice.

### Quick export vs background job

Small exports (< ~5,000 rows) generate immediately and download in your browser. Large exports (OEE across a year, Task Reporting for a large plant) run as **background jobs**:

1. Click the export button.
2. The portal acknowledges: "Your export is being generated."
3. A notification appears in your bell when ready (typically within a minute or two).
4. Click the notification to download, or find the file under **Reports → Exports**.

#### EXPORTS ARE SINGLE-DOWNLOAD AND EXPIRE

Background-exported files are deleted from the server after **one successful download**. If you need to share the file with colleagues, save it locally first and redistribute yourself. Un-downloaded files also auto-expire after **7 days** — download and archive locally if you need long-term retention.

### Export rate limit

To protect the platform from runaway export jobs, each user is rate-limited to **20 export requests per hour**. Exceeding this returns an error:

Too many export requests. Please try again in X minutes.

The 20 resets on a rolling hour. If you need to run more than 20 exports (a mass audit, a year-end package), spread them across multiple hours or split the work between several users. Rate limits are per-user, not per-company.

### API vs portal exports

If your installation exposes report exports through the API (for BI integrations), the API endpoints return **XLSX only** — not CSV or PDF. The portal's CSV / PDF buttons are portal-only. Integrations that need CSV should consume the XLSX file and convert.

## CSV format

- **Encoding:** UTF-8 with BOM (Excel-friendly on Windows).
- **Delimiter:** comma.
- **Quoting:** only fields containing commas, quotes, or newlines.
- **Line terminator:** `\n`.
- **Header row:** always included.
- **Numeric columns:** raw — no thousands separators, no currency symbols, no units.
- **Dates:** ISO 8601 ( `2026-04-24T09:30:00+07:00` ) in UTC.
- **Booleans:** `true` / `false`.
- **Empty cells:** empty string, not the word `null`.

To open cleanly in Excel on Windows, use **Data → From Text** with UTF-8 encoding rather than opening the file directly.

## PDF format

- **Paper size:** A4 (configurable in company settings).
- **Orientation:** portrait for summary reports, landscape for wide tables.
- **Header:** company logo, report name, date range, active filters.
- **Body:** the table — paginated across pages if it doesn't fit on one.
- **Footer:** page number, generated-at timestamp, user who ran the export.

## XLSX format

- **Workbook sheets:** one per logical grouping. OEE: one sheet per line. Task Reporting: a single sheet unless your export exceeds 1,000,000 rows.
- **Conditional formatting:** status cells coloured (overdue red, completed green, pending amber), threshold-violation values highlighted.
- **Frozen panes:** header row and first column stay visible while scrolling.
- **Auto-width:** columns sized to content for readability.
- **Formulas:** none — values are baked in. If your BI tool needs live formulas, CSV is better.
- **Cell formats:** dates as Excel date-time, numerics as numbers (not strings), booleans as Excel TRUE / FALSE.

XLSX is the best format for sharing with stakeholders who want to sort, filter, and annotate in Excel without writing formulas.

## PDF consumption

Ready to print or attach to an email. Includes:

- Report title and date range.
- Applied filters.
- The table.
- A footer with the company name and timestamp.

## Who sees what

---

- **Manager** — all reports, export.
- **Supervisor** — all reports, export.
- **Admin** — all reports, export.
- **Viewer** — all reports, export (read-only in the rest of the portal but reports are always read-only anyway, so Viewer's experience is full here).

Reports don't expose data outside your company's scope. PegotecUser can switch companies via the header switcher and run the reports on the switched-into tenant.

## Performance tips

---

Some reports (OEE, Yearly) are heavy. If a report is slow:

- Narrow the date range.
- Filter to a single site or line.
- Export and analyse in Excel rather than scrolling in the browser.

See [Performance is slow](#).

## Things to watch for

---

### APPROVAL BACKLOG DISTORTS NUMBERS

A report's "Completed" count only includes tasks that have been **approved**, not just submitted. If the approval queue is deep, the numbers understate actual completions. Clear approvals regularly.

### ALWAYS INCLUDE THE DATE RANGE ON SHARED EXPORTS

Before you email a PDF upstairs, add the date range to your message. A report taken out of context is easy to misread.

**DATA LAGS REAL TIME SLIGHTLY**

A task submitted seconds ago may not appear in a report until its approval is processed. For operational awareness, use the Dashboard; for analytical queries, reports are right.

## Troubleshooting

Problem	Fix
Report is empty	Check date range and filters first
Numbers don't match the Dashboard	Ensure both have the same filter state
Slow to load	Narrow the range or export to CSV
CSV opens with wrong encoding	Open via <b>Data</b> → <b>From text</b> in Excel; pick UTF-8
Column missing	Your role may not have access to that column

## Related topics

- [Dashboard](#) — operational-time equivalent.
- [Navigating the portal](#)
- [Manager handbook](#) — how Managers use these reports day-to-day.
- [Supervisor handbook](#) — how Supervisors use them.
- [File formats](#) — CSV / PDF export details.
- [Performance is slow](#)

# Feedback Management

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# Approve or reject a completed task

---

Review work submitted by technicians and either sign it off or send it back for rework.

## REQUIRED ROLE

Supervisor or Admin.

## Overview

---

### TASK APPROVAL IS OPTIONAL — CHECK YOUR COMPANY SETTING

The approval step only runs if your Admin enabled **Require Supervisor Approval for Task Completion** in [Company Setting → Task Approval](#). Many installations run without approval — technician submits = task complete. If your **Task Approvals** queue is consistently empty on a busy day, check that setting first.

When approval is enabled and a technician submits a completed task from the mobile app, the task enters status **Pending approval** and appears in the **Approvals** queue on the web portal. You review the submission — form values, photos, safety acknowledgements — and either:

- **Approve** → the task closes with status **Completed**.
- **Reject** → the task reopens in the technician's list with your rejection reason attached.

When approval is **disabled**, technician submissions auto-complete. Approvals queue stays empty and approved/rejected notifications never fire.

Approvals should be timely. A queue that grows beyond a shift's worth of work is a sign either of an understaffed supervisor or a team-wide issue that deserves a separate look.

Real-time updates arrive as new submissions — the page updates without a manual refresh.

The screenshot shows the 'Task Approvals' page in the Smart Maintenance Task Manager. The sidebar on the left contains a navigation menu with categories: Dashboard, Mapping, NFC Tags, Remarks, Products & Tools, TASK PLANNING (Assign Task, Daily Planning, Daily Workload Navigator, Workload Range, Shutdown, General Schedule Setup, Task Reporting), FEEDBACK MANAGEMENT (Task Approvals, History, Shutdown Report, NFC Skip Report), and REPORT (Yearly Comparison, Technician Comparison, Asset Availability, Completion Report). The main content area is titled 'Task Approvals' and features a large green checkmark icon with the text 'No tasks pending approval.' and a 'Refresh' button. The footer of the page reads 'Thank you for creating with React | 2026 © Themewagon'.

## Prerequisites

- You're signed in as a Supervisor or Admin.
- At least one technician has submitted a task.

## Open the approvals queue

1. In the sidebar, click **Approvals**.
2. The queue shows:
  - Tasks with status **5 (Pending)** — awaiting your review.
  - Tasks with status **6 (Rejected)** — ones you've sent back, still awaiting re-submission.
  - Tasks with status **3 (Approved)** — recently closed, for your reference.
3. By default the view is filtered to **Pending**. Use the filter bar to show others.

Each row shows: task name, asset, technician, submitted time, priority, and a status chip. Sort by submitted time (oldest first) to clear the queue fairly.

## Review a submitted task

---

### 1. Open the task

Click the row. A detail panel or new page opens with the full submission.

### 2. Check the form values

Look for:

- **Plausibility** — are the measurements in a reasonable range for this asset?
- **Thresholds** — values highlighted red are outside the configured threshold. These may be genuine findings (the asset is really running hot) or data-entry errors (a typo).
- **Consistency** — if the technician reported "condition: good" but logged a value outside threshold, something doesn't add up.

### 3. Check the photos

- Are they present? Some tasks require photos; the mobile app enforces this, but verify.
- Are they clear? Blurred, dark, or wrong-subject photos are grounds for rejection.
- Do they match the reported condition?

Click a photo to view it full-size. Use arrow keys to flip through.

### 4. Check safety acknowledgements

The detail view shows each safety measure with a timestamp of when the technician acknowledged it. Patterns to watch for:

- All acknowledgements stamped within a few seconds of each other → technician tapped through without reading.
- A missing acknowledgement → the mobile app blocks submission without acknowledgement, so a gap suggests a platform issue; flag it for support.

### 5. Check the notes

If the technician left notes or flagged an issue, read them carefully. A brief note like "vibration elevated, recommend follow-up inspection" warrants action outside of this approval — raise a repair request or create a follow-up task.

## 6. Decide: approve or reject

### Approve

---

1. Click **Approve**.
2. The task status changes to **Completed** immediately.
3. The technician receives a push notification: **Task approved**.
4. The task disappears from your Pending view.

### Reject

---

1. Click **Reject**.
2. A modal prompts for a **rejection reason** — this is required.
3. Enter a clear, specific reason. Good examples:
  - "Photo is too dark to confirm seal condition — please retake with flash."
  - "Temperature reading of 450°C is outside plausible range — please verify and resubmit."
  - "Missing grease quantity — the field was skipped."
4. Click **Confirm rejection**.

What happens next:

- The task status changes to **Rejected**.
- The technician receives a push notification with your reason.
- The task reopens in the technician's list for rework.
- When they resubmit, it returns to your queue as a new pending item.

#### **REJECT WITH SPECIFICS, NOT GENERICS**

"Resubmit please" gives the technician nothing to work with. Always name the field, the photo, or the specific problem — it shortens the feedback loop and keeps them engaged.

### Bulk actions

---

For tasks that you'd approve without a deep review (routine, repetitive, no red flags):

1. Check the boxes next to multiple tasks in the queue.
2. Click **Approve selected** in the bulk action bar.
3. Confirm.

### **DON'T BULK-APPROVE WITHOUT LOOKING**

Bulk approval is for volume, not for skipping review. If you find yourself bulk-approving entire shifts' worth of work, the data quality will slip over weeks. Scan at least a sample.

Bulk rejection isn't supported — rejection requires a task-specific reason.

## **Approval flow in practice**

### **When a technician disagrees with a rejection**

Rejected tasks come back into the technician's list. If the technician believes the rejection is wrong (the photo really was clear, the measurement really is correct), they can:

- Resubmit with additional context in the notes.
- Raise it with you directly over radio / in person.

There's no formal appeals process inside the platform. Discuss, agree, move on.

### **When a task is rejected multiple times**

If the same task gets rejected three times, something is wrong beyond the individual submission — a faulty asset, unclear task configuration, or a team misunderstanding. Stop rejecting and investigate the underlying cause.

### **When you're the one who submitted (Admin executing tasks)**

Admins can execute tasks on mobile. An Admin can approve their own submissions, but it's a poor practice — have another Supervisor approve your work for the audit trail.

## **Things to watch for**

### **STALE QUEUE**

The queue is a leading indicator. If it's consistently over twenty items, either workload exceeds supervision capacity or approval habits are lax. Track it and adjust.

### **APPROVE PROMPTLY**

Aim for <1 hour from submission to resolution during the shift. Technicians feel blocked when their work hangs in pending.

### **APPROVAL DOESN'T ROLL BACK**

Once approved, a task can't be unapproved from this screen. If you realise the approval was a mistake, raise it via your Admin — they can adjust the audit record but it's not a routine operation.

## Result

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After reviewing:

- Approved tasks are visible in reports (Task History, Completion Report, OEE).
- Rejected tasks are back in the technician's list for rework.
- The dashboard completion rate updates in real time.

## Related topics

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- [Assigning tasks](#) — upstream of this workflow.
- [Dashboard](#) — see your queue depth at a glance.
- [Reports](#) — downstream view of approved work.
- [Notifications](#) — control what notifications you receive about new submissions.
- [Executing a task \(mobile\)](#) — the technician's view.
- [Supervisor handbook](#) — the role overview.

# Reports

---

Run, view, and export the platform's ten core reports. Every report supports a date-range filter, column sorting, and CSV / PDF export.

## REQUIRED ROLE

Supervisor, Manager, Admin, or Viewer — all with read and export access.

## Overview

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Reports turn the stream of task executions, repair requests, and shutdowns into answers:

- Are we keeping up with the plan?
- Who's struggling on the team?
- Which assets are costing us the most?
- Are we getting faster or slower?

The reports page lives under **Reports** in the sidebar. Each report has its own sub-page with filters tailored to its content.

## Common controls

---

Every report shares a few controls:

- **Date range** — today / yesterday / last 7 days / this month / last month / custom. Your last-used range persists across sessions.
- **Filters** — site, line, technician, status, priority. Varies by report.
- **Column sort** — click any column header.
- **Pagination** — 25 / 50 / 100 / 250 rows per page.
- **Export** — CSV or PDF. The export reflects your current filter state.

## The ten reports

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### 1. Task Reporting

A drill-down operational report, starting at **Lines** and letting you drill to Assets → Sections → Task points → individual task instances.

The page has a **From / To** date range, a **Print** button (top-right), and a row of **counter tabs** across the top that filter the table below:

- **All Tasks** · **Overdue** · **Repair** · **Remarks** · **Notes** · **Alerts** · **NFC Skipped**

Each tab shows its current count and switches the table to that slice.

The table columns (at the Line level) are: **Line / Assets / Total / Completed / In Progress / Overdue / Drill-into**. Clicking the drill arrow on a row narrows you to that line's assets.

**Task Reporting**

FROM: dd.mm.yyyy TO: dd.mm.yyyy

All Tasks 78006
Overdue 7697
Repair 2
Remarks 0
Notes 2
Alerts 7697
NFC Skipped 47274

LINE	ASSETS	TOTAL	COMPLETED	IN PROGRESS	OVERDUE	
Dyeing Line & Lawer	38	19740	6339	0	1406	>
Cool Pad Batch Line	5	3861	1956	0	180	>
Washing Range Line	11	71556	24742	0	4823	>
Stenter Line	32	16698	8026	0	884	>
Calendaring Line	7	13425	6220	0	304	>
Shuilding Line	7	0	0	0	0	>
Test	0	0	0	0	0	>
Test 1	0	0	0	0	0	>
Shrinking Line	3	0	0	0	0	>
Washing Range Line	3	0	0	0	0	>
Digital Printing Line	11	0	0	0	0	>
Steamer Line	6	0	0	0	0	>

**Use it for:** operational drill-down on where work is happening and where it's stuck. Less a raw log than a roll-up you navigate.

## 2. Task History

Historical view with search and filter. Includes drafts and rejected tasks that Task Reporting omits.

**Use it for:** "what happened to that task last Tuesday?" style investigations.

## 3. Shutdown Report

One row per shutdown event.

Column	Meaning
Start	Shutdown start time.
End	End time (blank if still active).
Duration	End minus start, in hours.
Line	Affected production line.
Reason	From master data shutdown-reason list.
Reported by	Technician who filed the report.
Resolved by	Who marked it resolved.

**Use it for:** incident analysis; repeat-offender tracking; OEE-driver decomposition.

## 4. Yearly Report

Annual aggregated metrics. One row per month, columns for every major metric.

**Use it for:** board / exec summaries; year-over-year comparisons; capital planning.


## 5. Technician Comparison

One row per technician. Columns:

- Tasks assigned.
- Tasks completed.
- Completion rate.
- Average time-to-completion.
- Rejection rate.
- Overdue count.

**Use it for:** performance reviews; identifying coaching opportunities; rebalancing workload.

### CONTEXT MATTERS

 A technician with a low completion rate may be covering the hardest assets. Always read the numbers alongside the shift mix and asset complexity.

## 6. Asset Availability

Uptime percentage and downtime hours per asset, over the selected range.

**Use it for:** identifying the assets that drag your OEE down; capital replacement decisions.

## 7. OEE Report

Overall Equipment Effectiveness — the combined **Availability × Performance × Quality** metric used in manufacturing.

- **Availability** — uptime / planned production time.
- **Performance** — actual output / theoretical maximum output (if your tasks capture output).
- **Quality** — good units / total units (if captured).

**Use it for:** executive-level performance tracking; cross-site / cross-line comparisons.

### OEE NEEDS PRODUCTION TASKS

The Performance and Quality components depend on Production task executions that capture output numbers. If your team doesn't run Production tasks, the OEE report falls back to Availability only.

## 8. Completion Report

Completion rate broken down by line, asset, or technician.

**Use it for:** quick "are we on plan?" checks; spotting under-performing segments.

## 9. Repair Request Report

One row per repair request.

Column	Meaning
Submitted	When the technician raised it.
Asset	Affected asset.
Failure type	From master data.
Priority	Low / Medium / High / Critical.
Status	Submitted / Acknowledged / In progress / Resolved / Closed.
Resolution time	Time from submitted to resolved.
Parts used	If the resolution captured parts.

**Use it for:** failure-pattern analysis; cost attribution; backlog tracking.

## 10. Flowchart

A visual process-flowchart display of the asset hierarchy. Less a report than a navigation aid for users who think in pictures rather than trees.

**Use it for:** explaining the plant layout to visitors; annotating review documents.

## Exporting

---

Every report supports three export formats:

- **CSV** — raw tabular data. UTF-8, comma-delimited, `\n` line terminator.
- **PDF** — print-ready with company logo, date range, and active filters in the header.
- **XLSX** — formatted Excel workbook with coloured status cells, frozen headers, and multiple sheets for multi-dimension reports (e.g. the OEE report ships separate sheets per line).

The export reflects **your current filter state**. Re-apply filters and re-export for a different slice.

### Quick export vs background job

Small exports (< ~5,000 rows) generate immediately and download in your browser. Large exports (OEE across a year, Task Reporting for a large plant) run as **background jobs**:

1. Click the export button.
2. The portal acknowledges: "Your export is being generated."
3. A notification appears in your bell when ready (typically within a minute or two).
4. Click the notification to download, or find the file under **Reports → Exports**.

#### EXPORTS ARE SINGLE-DOWNLOAD AND EXPIRE

Background-exported files are deleted from the server after **one successful download**. If you need to share the file with colleagues, save it locally first and redistribute yourself. Un-downloaded files also auto-expire after **7 days** — download and archive locally if you need long-term retention.

### Export rate limit

To protect the platform from runaway export jobs, each user is rate-limited to **20 export requests per hour**. Exceeding this returns an error:

Too many export requests. Please try again in X minutes.

The 20 resets on a rolling hour. If you need to run more than 20 exports (a mass audit, a year-end package), spread them across multiple hours or split the work between several users. Rate limits are per-user, not per-company.

### API vs portal exports

If your installation exposes report exports through the API (for BI integrations), the API endpoints return **XLSX only** — not CSV or PDF. The portal's CSV / PDF buttons are portal-only. Integrations that need CSV should consume the XLSX file and convert.

## CSV format

- **Encoding:** UTF-8 with BOM (Excel-friendly on Windows).
- **Delimiter:** comma.
- **Quoting:** only fields containing commas, quotes, or newlines.
- **Line terminator:** `\n`.
- **Header row:** always included.
- **Numeric columns:** raw — no thousands separators, no currency symbols, no units.
- **Dates:** ISO 8601 ( `2026-04-24T09:30:00+07:00` ) in UTC.
- **Booleans:** `true` / `false`.
- **Empty cells:** empty string, not the word `null`.

To open cleanly in Excel on Windows, use **Data → From Text** with UTF-8 encoding rather than opening the file directly.

## PDF format

- **Paper size:** A4 (configurable in company settings).
- **Orientation:** portrait for summary reports, landscape for wide tables.
- **Header:** company logo, report name, date range, active filters.
- **Body:** the table — paginated across pages if it doesn't fit on one.
- **Footer:** page number, generated-at timestamp, user who ran the export.

## XLSX format

- **Workbook sheets:** one per logical grouping. OEE: one sheet per line. Task Reporting: a single sheet unless your export exceeds 1,000,000 rows.
- **Conditional formatting:** status cells coloured (overdue red, completed green, pending amber), threshold-violation values highlighted.
- **Frozen panes:** header row and first column stay visible while scrolling.
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- [Manager handbook](#) — how Managers use these reports day-to-day.
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- [Performance is slow](#)

# Configuration

---

# Company Setting

---

Configure company-wide behaviour: company profile, application settings, features, scheduling, task escalation, access control, and approval policy.

## REQUIRED ROLE

Admin.

## Overview

---

**Company Setting** is the top-level configuration page for your tenant. Everything here applies to every user in the company. For personal preferences (language, avatar, password) each user manages their own in [Profile and settings](#).

The page has nine logical sections, all visible at once (not tabbed). A single **Save Settings** button at the top-right commits every change.

Smart Maintenance TASK MANAGER

PT Kahatex

Search...

## Company Settings

Manage your company profile and application settings

Save Settings

### Company Information

COMPANY NAME *	INDUSTRY
PT Kahatex	Textile
SEGMENT	SITE
Textile	Kahatex
CUSTOMER	CURRENCY
Dodoy Macca	e.g. USD, EUR, IDR
ADDRESS	
Jl. Tanah Abang IV No.31 RT.009/04	

### Location

REGION: South East Asia

COUNTRY: Select country...

STATE / PROVINCE: Select state...

### Company Logo

Choose Logo...

### Contact Information

CONTACT PERSON	POSITION
Mr.Asep	Engineering Manager
EMAIL ADDRESS	CONTACT EMAIL
asep@kahatex.com	asep@kahatex.com
PHONE	
+63469721832	

### Application Settings

DAILY GRACE PERIOD (HOURS)	WEEKLY GRACE PERIOD (DAYS)
MONTHLY GRACE PERIOD (DAYS)	NFC REQUIRED
	<input checked="" type="checkbox"/>
QR / BARCODE SCANNING	MAX TASKS PER TECHNICIAN
<input checked="" type="checkbox"/>	
MINIMUM APP VERSION	CLOCK DRIFT THRESHOLD (MINUTES)
e.g. 1.0.0	5
COMPLETION TARGET (%)	
85	

### Features

MULTI-TECHNICIAN ASSIGNMENT

Allow assigning multiple technicians to one task

### Scheduling & Sync

SCHEDULE HORIZON (DAYS)	SYNC PAST WINDOW (DAYS)
90	90
SYNC FUTURE WINDOW (DAYS)	TOP TECHNICIANS IN REPORT
30	5

### Task Escalation

Automatically notify supervisors and managers when tasks remain overdue beyond configurable thresholds.

ENABLE AUTOMATIC ESCALATION	SEND ESCALATION EMAILS
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TIER 1 THRESHOLD (HOURS)	TIER 2 THRESHOLD (HOURS)

### WebSocket

Status: Enabled


Host: api.staging.sm-tm.app

Port: 6001

Scheme: WS

WebSocket configuration is managed by the server.

### Mobile App Setup



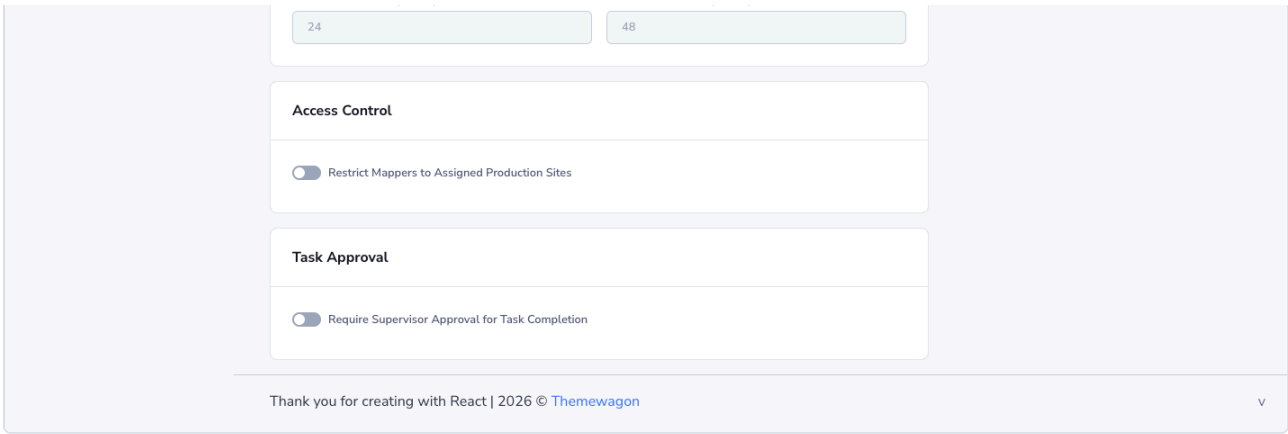
Scan with the Smart Maintenance app to configure a device.

<https://api.staging.sm-tm.app/api> Copy

Collapsed View

Page 203 of 447

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## Open the page

Configuration → Company Setting in the sidebar. URL: `/settings`.

## Company Information

Your tenant's display identity.

Field	Effect
Company Name (required)	Appears in the portal header, email notifications, and printable report headers.
Industry	Free-text descriptor.
Segment	Sub-classification within industry.
Site	Primary site label.
Customer	Internal customer reference (often the plant owner / operator).
Currency	Free-text — e.g. USD, EUR, IDR. Used in cost-related reports.
Address	Appears on printable exports.

## Contact Information

The primary contact person(s) for this tenant.

Field	Notes
Contact Person	Main point of contact.
Position	Their role.
Email Address / Contact Email	Two email fields — primary and optional secondary.
Phone	Phone number with country code.

## Application Settings

The operational defaults that shape how tasks, overdues, and mobile behave.

Field	Effect
Daily Grace Period (hours)	Grace window before a daily-recurring task counts as overdue.
Weekly Grace Period (days)	Same for weekly schedules.
Monthly Grace Period (days)	Same for monthly schedules.
NFC Required	Toggle. If <b>on</b> , mobile task execution requires an NFC scan; otherwise it's optional.
QR / Barcode Scanning	Toggle. Enables the barcode scanner on mobile.
Max Tasks per Technician	Cap on concurrent assigned tasks per technician. Blocks further assignment when reached.
Minimum App Version	Minimum semver (e.g. <code>1.2.0</code> ) the mobile app must run to sync. Older versions are blocked and prompted to update.
Clock Drift Threshold (minutes)	Max allowed deviation between mobile device clock and server. Submissions with clocks outside the threshold get flagged.
Completion Target (%)	Company-wide completion-rate target. Shows as a benchmark on reports.

### GRACE PERIODS BEAT TIGHT DUE TIMES

Instead of marking every task overdue at its exact due time, use grace periods to give technicians buffer. A 2-hour daily grace lets a shift-end task finish without becoming "overdue".

## Features

Optional feature toggles — cross-cutting behaviours that change how whole workflows operate.

Feature	Effect
Multi-Technician Assignment	Allows one task to be assigned to multiple technicians simultaneously. Default <b>off</b> . When off, the <a href="#">Assign Task</a> page assigns each selected task to one of the ticked technicians round-robin; when on, the task is duplicated across every ticked technician.

More feature flags may appear here depending on your installation. See [Feature Flags](#) for rollout-scoped toggles (distinct from the core flags shown here).

## Scheduling & Sync

Controls for schedule generation and mobile sync windows.

Field	Effect
<b>Schedule Horizon (days)</b>	How far into the future the scheduler pre-generates task instances. Default 90. Higher = more tasks visible in advance, more database rows.
<b>Sync Past Window (days)</b>	How far back mobile devices sync historical tasks. Default 90.
<b>Sync Future Window (days)</b>	How far ahead mobile devices sync upcoming tasks. Default 30.
<b>Top Technicians in Report</b>	Number of technicians to show in the Dashboard / Technician Comparison top-list. Default 5.

### DON'T SET SYNC WINDOWS TOO LARGE

A wide sync window pulls more data to every device. For a large plant, this slows the first sync and uses more device storage. 90 days is a reasonable default for most tenants.

## Task Escalation

Automatic notifications to supervisors and managers when tasks remain overdue beyond configurable thresholds.

Field	Effect
<b>Enable Automatic Escalation</b>	Master toggle. Default <b>off</b> .
<b>Send Escalation Emails</b>	When escalation fires, also send email (in-app notifications are always sent).
<b>Tier 1 Threshold (hours)</b>	After this many hours past due, the first escalation fires to Supervisors. Default <b>24</b> .
<b>Tier 2 Threshold (hours)</b>	After this many more hours (beyond Tier 1), the second escalation fires to Admins / Managers. Default <b>48</b> .

### ESCALATION IS OFF BY DEFAULT

If the company doesn't explicitly turn this on, overdue tasks do **not** generate escalation notifications — only the assigned technician's own overdue notification. Turn on Escalation to loop in supervisors and managers automatically.

## Access Control

Company-wide access constraints.

Field	Effect
<b>Restrict Mappers to Assigned Production Sites</b>	Toggle. When <b>on</b> , Mapper users see and edit only the production sites explicitly assigned to them (in <a href="#">User List</a> ). When <b>off</b> , Mappers see every site in the company. Default <b>off</b> .

## Task Approval

Field	Effect
Require Supervisor Approval for Task Completion	Toggle. When <b>on</b> , technician submissions enter a <b>Pending</b> state and appear in <a href="#">Task Approvals</a> for a Supervisor to approve or reject. When <b>off</b> , submissions auto-complete without review.

### APPROVAL IS OPTIONAL

Task approval is **not enabled by default**. Many installations run without it (technician submits = task complete). Only turn this on if your operation benefits from a review step — audit environments, safety-critical tasks, training periods.

When approval is **off**, [Task Approvals](#) stays empty; notifications about approval / rejection don't fire.

## Location (right column)

Region / Country / State dropdowns. Advisory only — doesn't constrain user access (that's done via production-site scoping in Access Control).

## Company Logo (right column)

Upload a logo (SVG or PNG). Appears in the portal header and on printable reports / PDF exports.

## WebSocket (right column)

Read-only status of the real-time connection:

- **Status** — Enabled / Disabled.
- **Host** — e.g. `api.staging.sm-tm.app`.
- **Port** — e.g. `6001`.
- **Scheme** — `ws` or `wss`.

Text at the bottom: *"WebSocket configuration is managed by the server."* — you can't change this from here; it's informational so you can diagnose connection issues.

## Mobile App Setup (right column)

A QR code + URL preview for quick mobile pairing. Same capability as the dedicated [Mobile Setup \(QR\)](#) page but shown inline here for convenience.

Includes a **Copy** button to copy the pairing URL to your clipboard.

## Save

The **Save Settings** button in the top-right commits every change across all sections in one operation. No per-section save — it's all-or-nothing.

Changes propagate:

- Immediately in the web portal on next page load.
- On mobile devices at the next sync cycle (or Force Sync).

## Things to watch for

### ⚠️ GRACE PERIODS RIPPLE INTO OVERDUE COUNTING

Changing grace periods retroactively re-evaluates which tasks are "overdue". The Dashboard number may jump after a save.

### 📅 REVIEW GRACE PERIODS AND APPROVAL TOGGLE ONCE PER QUARTER

These are the two settings that most commonly drift out of alignment with actual operations. Quick quarterly check keeps them honest.

### 🚫 NO SITE-SPECIFIC DEFAULTS

Company Setting is a single set of values for the whole tenant. If two production sites genuinely need different grace periods, that's a product-level feature request.

## Troubleshooting

Problem	Fix
Save Settings button greyed out	Your role may not include <code>settings.edit</code> — only Admin can save
Logo doesn't appear	Check file size / format; SVG or PNG, under 200 KB is a good target
WebSocket shows red	Server-side connection issue — contact Pegotec support
Escalation notifications not firing	Check the toggle is on and Tier 1 / Tier 2 thresholds are set
Tasks complete without review	Task Approval toggle is off — turn on if you want the review step

## Related topics

- [Feature Flags](#) — rollout-scoped toggles.
- [Mobile Setup \(QR\)](#) — the full mobile-pairing page.
- [Task Approvals](#)

- [Notifications reference](#)
- [Admin handbook](#)

# Feature flags

---

Enable or disable optional platform features for your company without needing a release.

## REQUIRED ROLE

Admin.

## Overview

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Feature flags let your company opt into (or out of) specific platform features without a code change. Each flag controls one cohesive feature — a new report, an alternative mobile workflow, an integration — and defaults to a value chosen by Pegotec.

Typical uses:

- **Rolling out a new feature gradually** — early adopters flip on while the rest wait.
- **Disabling a noisy feature** — turn off a notification category or UI element that doesn't fit your workflow.
- **Trial before commitment** — try a beta feature for a week and decide whether to keep it.

Not every optional behaviour is a flag. Pegotec surfaces flags for features that are:

- Stable enough to offer.
- Optional in the sense that some tenants would reasonably want them off.
- Tenant-scoped (applies cleanly per company, not per user).

## Prerequisites

---

- You have the Admin role.
- You have the authority to toggle a feature on behalf of your company (some flags have wider implications — read the description before flipping).

## Open the Feature Flags page

---

**Settings** → **Feature flags**. You see a list of available flags:

Column	Meaning
Flag	Short name (e.g. <code>advanced_scheduling</code> ).
Description	What the flag does in plain English.
Status	On / Off for your company.
Default	Pegotec's default for new tenants.
Since	When the flag first became available.

## Enable or disable a flag

1. Find the flag in the list.
2. Click the toggle.
3. Confirm.

The change is immediate for most flags — users see the new behaviour on their next page load. A few flags (e.g. ones that change data structure) require a sync on mobile devices; the UI flags these with a note.

## What happens when you flip a flag

- Users signed in at the time see the change on their next page load (or next mobile sync).
- The change is logged in the [activity log](#) with your user ID.
- Reports that reference flag-gated features update immediately.

## Common flags (examples)

Names and availability vary by installation. Typical categories:

### UI flags

- Alternative navigation layouts.
- Optional dashboard widgets.
- Advanced filter panels.
- Bulk-action bars on list views.

### Workflow flags

- Simplified vs detailed task submission.

- Auto-assign on schedule generation.
- Required photos on shutdown reports.
- Dual-approval for high-cost repair requests.

## Integration flags

- Webhook auto-retry behaviour.
- External CMMS handoff on shutdown.
- SSO-only sign-in (disables password login).

## Beta flags

- Features in pre-release. Usually off by default.
- Flags labelled "beta" may change behaviour or go away between releases.

## Reading a flag description

---

Every flag's description tells you:

- **What it does** — the user-visible effect.
- **Who is affected** — all users / specific roles / mobile only / etc.
- **Whether it's safe to flip back** — almost always yes; if not, the description says so.
- **Any setup required before enabling** — e.g. "requires webhook URL configured in Settings".
- **Link to the relevant handbook page** where available.

Don't flip a flag whose description you don't understand. Talk to Pegotec support first.

## Flags that affect data

---

Most flags are cosmetic or workflow tweaks. A few flags change **what data is captured**:

- Turning on "required photos on shutdown" adds a validation; existing data is untouched.
- Turning off "run-hour-based scheduling" doesn't delete existing run-hour schedules but stops generating new instances.
- Turning on "audit email sign-ins" begins logging sign-ins but doesn't back-fill.

For data-affecting flags, the description explicitly flags it as such.

## Things to watch for

### ⚠️ DON'T FLIP FLAGS DURING BUSINESS HOURS WITHOUT TESTING

A flag that changes a user's workflow will surprise them mid-task. Flip during low-traffic windows, or on a staging installation first, where available.

### 📖 READ THE DESCRIPTION EVEN IF THE NAME SEEMS OBVIOUS

"Strict submission" sounds self-explanatory — until you realise it rejects partial drafts that your team relies on. The description spells this out.

### 👤 FLAGS ARE COMPANY-WIDE, NOT PER-USER

You can't enable a flag for one user as a trial. Everyone in the company sees the same set. For per-user variants, use custom roles and permissions.

## Troubleshooting

Problem	Fix
Flag toggled but no change visible	Refresh the page; for mobile users, force a sync
Flag name unclear	Check the description; contact Pegotec support if still unclear
Toggle greyed out	Some flags require a higher-tier account or SSO setup — description says which
Don't see the Feature flags menu	Your role may not include <code>settings.edit</code> — request from an Admin

## Related topics

- [Admin handbook](#)
- [Activity log](#) — every flag flip is logged here.
- [Profile and settings](#) — company-wide settings (non-flag).
- [Contact support](#) — for questions about specific flags.

# Webhooks

Register outbound HTTP endpoints that receive platform events in real time. Use them to integrate the platform with your CMMS, BI pipeline, Slack / Teams, or custom systems.

## REQUIRED ROLE

Admin.

## Overview

A **webhook** is a URL the platform calls when a specific event happens in your tenant. Webhook endpoints live in your infrastructure (or a third-party integration platform); the platform sends JSON payloads to them.

Typical use cases:

- Post completed tasks to your existing CMMS / Maximo / SAP-PM.
- Alert Slack or Microsoft Teams when a Critical repair request is filed.
- Feed a data warehouse with shutdown events for longer-term analytics.
- Trigger a Zapier / Make workflow to route repair requests into a ticketing tool.

## Open the Webhooks page

**Configuration → Webhooks.**

You see the list of webhooks configured for your company:

Column	Meaning
Name	Your label.
URL	The endpoint the platform calls.
Events	Which event types trigger this webhook.
Last fired	When this webhook was last called.
Success rate	24-hour rolling success rate (2xx responses / total attempts).
Active	On / off toggle.

## Register a webhook

### 1. New webhook.

### 2. Fill in:

Field	Notes
<b>Name</b>	Human label. "Slack #maintenance" or "SAP-PM bridge".
<b>URL</b>	The endpoint. Must be HTTPS in production.
<b>Events</b>	Multi-select from the available event types (see below).
<b>Secret</b> (optional)	A shared secret used to sign each request with HMAC-SHA256 (header: <code>X-SMTM-Signature</code> ).
<b>Headers</b> (optional)	Additional headers to send with every request (e.g. <code>Authorization: Bearer xyz</code> ).
<b>Description</b>	Internal documentation of what this webhook does.

### 3. Save. The webhook is active immediately for new events.

## Event types

Common event categories the platform emits:

- `task.assigned` — a task is assigned to a technician.
- `task.completed` — technician submitted a task.
- `task.approved` / `task.rejected` — Supervisor action.
- `repair_request.created` — a new repair request.
- `repair_request.updated` — status change.
- `shutdown.reported` — new shutdown.
- `shutdown.resolved` — shutdown closed.
- `user.created` / `user.deactivated` — account changes.
- `audit.exported` — someone exported the activity log.

Not every installation exposes every event; the **Events** dropdown on the webhook form lists what's available on yours.

## Payload format

Every webhook POST includes:

```

{
  "event": "task.completed",
  "timestamp": "2026-04-24T09:15:30+07:00",
  "company_id": 1,
  "company_name": "PT Kahatex",
  "data": {
    "task_id": 12345,
    "asset_id": 678,
    "technician_id": 42,
    ...
  }
}

```

Headers:

- Content-Type: application/json
- User-Agent: SmartMaintenance/1.0
- X-SMTM-Event: task.completed
- X-SMTM-Delivery: <uuid> — idempotency key.
- X-SMTM-Signature: sha256=<hex> — HMAC signature, if you configured a secret.

## Verify signatures

If you configured a secret:

1. Take the raw request body as bytes.
2. Compute `HMAC-SHA256(body, secret)`.
3. Compare to the hex value in `X-SMTM-Signature` (after the `sha256=` prefix).
4. Use a constant-time comparison (not `==`) to prevent timing attacks.

If signatures don't match, reject the request — it may be spoofed.

## Delivery and retries

- **First attempt** — immediate when the event fires.
- **Retry on non-2xx** — exponential backoff at 1, 5, 25, 125, 625 seconds (5 retries, ~15 minutes total).
- **After 5 failed retries** — the event is marked permanently failed and logged. Not retried further.

The webhook's detail page shows failed-delivery history and lets you manually re-fire.

## Test-fire

---

Before activating a webhook in production:

1. Webhooks → (row) → **Send test event**.
2. Pick an event type.
3. The platform sends a test payload (with a synthetic `data` block) to your URL.
4. Check your endpoint logs; if you get 200 back, it's wired up.

Test events are flagged in the payload with `"test": true` so your endpoint can distinguish them.

## Disable or delete

---

- **Disable** — toggles off. No new events fire this webhook. Reversible.
- **Delete** — removes the webhook permanently. History is retained in the audit log.

## Things to watch for

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### HTTPS ONLY FOR PRODUCTION

Payloads may contain identifying data (user names, task details). Don't send them over HTTP. The platform warns when you register a non-HTTPS URL.

### USE A SHARED SECRET

Signing with a secret is 5 minutes of setup and prevents spoofed events from landing in your downstream system. Always use one.

### WEBHOOKS ARE NOT GUARANTEED IN-ORDER

Two events fired close together may arrive in either order. Your endpoint should use the `timestamp` field to order them if that matters.

## Troubleshooting

---

Problem	Fix
Webhook never fires	Confirm Active toggle; confirm the event type is in your selection
Signature check fails	Make sure you're hashing the raw body (bytes), not the parsed JSON
Failed deliveries accumulating	Check your endpoint is reachable, returns 2xx, and responds under 30 seconds
Duplicates arriving	Use <code>X-SMTM-Delivery</code> as idempotency key — the platform may retry on transient failures

## Related topics

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- [Company Setting](#) — adjacent configuration.
- [Activity log](#) — local audit trail (distinct from outbound webhooks).
- [Admin handbook](#)

# Safety Standards

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# Safety Standards

---

Define the safety steps technicians must acknowledge, the repair-request types they can file, and the shutdown reasons they can choose from. All three feed the safety / incident reporting pipeline.

## REQUIRED ROLE

Mapper or Admin. Supervisor and Viewer have read-only access.

## Overview

---

**Safety Standards** is the umbrella for three closely-related configuration items:

- **Safety Procedures** — the acknowledgement checklists that gate certain tasks.
- **Repair Requests** — the dropdown of failure categories technicians pick when filing a repair request.
- **Shutdown Reasons** — the dropdown of causes technicians pick when reporting a shutdown.

Together they shape how safety and incidents are captured across your plant.

This menu item expands into three sub-menus — one page each.

## Submenu

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- [Safety Procedures](#) — acknowledgement-gated procedures attached to tasks.
- [Repair Request Types](#) — the failure-category catalogue.
- [Shutdown Reasons](#) — the shutdown-cause catalogue.

## How the three connect

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- A **Safety Procedure** may mention specific failure modes; those failure modes should be reflected in the **Repair Request Types** catalogue so technicians can file them with the right category.
- **Shutdown Reasons** split planned / unplanned / force-majeure for OEE attribution; planned maintenance shutdowns can reference the safety procedure that gates them.
- Together they drive the **Shutdown Report**, **Repair Request Report**, and any audit packs you generate.

## Review cadence

---

These catalogues drift. Review annually (or after any significant incident):

- Any **failure type** technicians type into the "description" field repeatedly but isn't in the dropdown → promote to a formal category.
- Any **safety procedure** with tap-through-in-5-seconds acknowledgement patterns → rewrite (steps too vague, or too many).
- Any **shutdown reason** rarely used → consider merging or deactivating.

## Things to watch for

---

### THESE ARE COMPANY-WIDE

All three catalogues are scoped to the company, not per-user. A change to Safety Procedures affects every task with that procedure attached across the whole tenant.

### CO-OWN WITH YOUR SAFETY OFFICER

Mapper owns the tool; the safety officer owns the content. Write and review together.

## Related topics

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- [Safety Procedures](#)
- [Repair Request Types](#)
- [Shutdown Reasons](#)
- [Repair requests \(mobile\)](#) — the technician's side.
- [Reporting a shutdown \(mobile\)](#)
- [Reports](#) — downstream analytics.
- [Mapper handbook](#)

# Safety procedures

---

Define the safety checklists — lock-out / tag-out steps, PPE confirmation, hazard acknowledgement — that a technician must acknowledge **before** a task form becomes available on mobile.

## REQUIRED ROLE

Mapper or Admin.

## Overview

---

A **safety procedure** is an ordered list of **safety measures** (steps) attached to one or more tasks. When a technician opens a task with a safety procedure on it, the mobile app walks them through each measure and requires acknowledgement before the task form loads.

Acknowledgements are timestamped and stored with the task record. Supervisors can see when each step was acknowledged during the review in [Approving tasks](#) — a tap-through-in-two-seconds pattern is visible and flaggable.

Safety procedures don't just exist for paperwork. They're a real safety layer: a technician can't submit the task without going through the steps.

## Prerequisites

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- You have the Mapper or Admin role.
- You know the safety standards your plant operates under — your safety officer or SHE team should own or co-own the content.

## Open safety procedures

---

**Safety procedures** in the sidebar. You see a list with:

Column	Meaning
Name	The procedure name.
Measure count	How many acknowledgement steps.
Linked tasks	How many tasks reference it.
Last modified	When and by whom.

## Create a procedure

### 1. New procedure

Click **New procedure**.

### 2. Name it

Short, specific. Examples:

- "Electrical lock-out — low voltage".
- "Hot work — cutting and grinding".
- "Confined space entry".
- "Working at height > 2 m".

Avoid generic names like "Safety check" — one procedure per class of work is clearer than one catch-all.

### 3. Add measures

Each **measure** is a single step the technician will tap to acknowledge.

Click **Add measure** and fill in:

Field	Notes
<b>Order</b>	Position in the list. Lower numbers appear first.
<b>Instruction</b>	What the technician must verify or do. Full sentence, clear imperative.
<b>Required</b>	If off, the technician can skip. Almost always leave on.

Example measures for an electrical lock-out procedure:

1. Verify lock-out tag is in place on the main disconnect.
2. Confirm voltage reading is 0 V with a known-working meter.

3. Confirm you are wearing Class 0 rubber gloves and arc-rated outerwear.
4. Verify the area is barricaded.
5. Confirm nobody else is working within the arc flash boundary.

## 4. Reorder

Drag measures up and down in the list to reorder. Order matters — the app shows them in the order you've set.

## 5. Save

Click **Save**. The procedure is created but not yet linked to any tasks.

## Link a procedure to tasks

---

Three ways:

### [From the task's detail page](#)

1. Open the task.
2. In the **Safety procedure** section, click **Attach**.
3. Pick the procedure from the dropdown.
4. Save.

### [From the component-task tree](#)

1. Open the component type.
2. On the linked task, pick a safety procedure from the dropdown.
3. Save.

The procedure is inherited by every asset that uses this component type.

### [Bulk: from the procedure's detail page](#)

1. Open the procedure.
2. In the **Linked tasks** section, click **Add tasks**.
3. Select tasks from the catalogue.
4. Save.

## Edit a procedure

---

Open the procedure → **Edit**.

- Rename — propagates everywhere.
- Add / remove measures — applies to future task executions. Existing submissions are not retroactively changed.
- Reorder measures — applies to future executions.

### CHANGES DON'T REWRITE HISTORY

If a technician acknowledged steps 1-3 of a 3-step procedure yesterday, then you add a step today, yesterday's submission remains 3-of-3. Future executions will see 4 steps.

## What a technician sees

---

When a technician on the mobile app opens a task with a safety procedure attached:

1. Task summary screen loads.
2. **Start** button reads **Start (acknowledge safety first)**.
3. Tapping **Start** opens the safety flow — one full-screen prompt per measure.
4. Each prompt shows the instruction with a prominent **Acknowledge** button.
5. After the last measure is acknowledged, the task form loads.

See [Executing a task](#) for the technician's experience.

## Acknowledgements in the audit trail

---

Every acknowledgement is stored with:

- Timestamp.
- User ID of the technician.
- Task ID.
- Measure ID.

This record is visible:

- To the Supervisor during [Approving tasks](#).
- In Task Reporting and Task History reports.
- To auditors via the audit log (Admin view).

## Deactivate a procedure

---

Procedures → (row) → **Deactivate**. Future task executions no longer gate on this procedure. Existing historical acknowledgements are preserved.

### DEACTIVATING MID-SHIFT

If a technician is mid-execution when you deactivate, their acknowledgements still count — the app already picked up the rule when they started. New starts after the deactivation won't see the gate.

## Delete a procedure

---

Delete only if the procedure was created by mistake and has no history. For retired procedures, deactivate and keep the record.

## What makes a good procedure

---

### Do:

- Use numbered steps that read as imperatives.
- Keep each step focused on one verifiable action.
- Short — 3 to 8 steps is typical. Anything longer suggests the procedure should be split.
- Name the specific tools / PPE required in the step text.
- Review with the safety officer before activating.

### Don't:

- Mix general safety guidance with task-specific steps.
- Use vague language ("Be careful of electrical hazards").
- Add steps that can't be verified in the moment (e.g. "Ensure all risks have been assessed" — acknowledge what?).
- Include more than one check per step — split them.

## Common patterns

---

### Baseline procedure for every task

Some plants attach a minimal 2-step procedure ("PPE confirmed", "Hazard assessment complete") to every task. It adds a few seconds per task but establishes a consistent safety baseline. The mapper links it from the component-task tree rather than every task individually.

## Per-risk-class procedures

Create one procedure per distinct risk class:

- Electrical lock-out.
- Chemical handling.
- Hot work.
- Confined space.
- Working at height.

Attach each to the relevant tasks. Review annually with the safety team.

## Escalating severity

For tasks that involve multiple hazards, you can attach multiple procedures. The technician acknowledges them all in order before the task form loads. Keep the combined step count under ~10 or engagement drops.

## Things to watch for

### DON'T LET PROCEDURES BECOME THEATRE

If your procedures are too long or too generic, technicians learn to tap-through in seconds. The safety value evaporates and the data becomes misleading. Audit acknowledgement times periodically — a pattern of 1-second taps means your procedure needs a rewrite, not a reminder.

### COORDINATE WITH YOUR SAFETY OFFICER

Mapper owns the platform; the safety officer owns the content. The best outcomes come from co-authoring — Mapper handles the clicks, safety officer handles the wording.

### PROCEDURES DON'T BLOCK DURING OFFLINE EXECUTION

If a technician is offline, they still acknowledge each measure; acknowledgements upload with the task submission. Offline does not bypass the gate.

## Troubleshooting

Problem	Fix
Procedure doesn't appear on the mobile task	Confirm it's attached to the task or to the component-task mapping; force-sync on the device
Measure order is wrong	Open the procedure; drag to reorder; save
Technician can submit without acknowledging	This shouldn't happen — the app enforces it. If you see it, report as a bug to Pegotec support
Acknowledgement timestamps all identical	Technician tapped through without reading — coaching opportunity

## Related topics

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- [Approving tasks](#) — where supervisors see the acknowledgement trail.
- [Executing a task \(mobile\)](#) — the technician's experience.
- [Components](#) — linking procedures through the component-task tree.
- [Task Reporting / Task History](#) — reporting on acknowledgements.
- [Mapper handbook](#)
- [Admin handbook](#)

# Repair Request Types

The master catalogue of **failure categories** that technicians choose from when filing a repair request. Not to be confused with the repair requests themselves.

## REQUIRED ROLE

Mapper or Admin.

## NOT THE SAME AS REPAIR REQUESTS

This page manages the **dropdown options**. To view or act on actual submitted repair requests, open the mobile [repair-requests](#) workflow or the Repair Request Report under [Reports](#).

## Overview

When a technician files a repair request from the mobile app, they pick a **failure type** from a dropdown. This page manages that dropdown.

A well-curated list of failure types:

- Keeps submissions consistent — "seal leak" always maps to the same category.
- Drives meaningful aggregation in the Repair Request Report.
- Surfaces systemic issues (e.g. "45 requests were seal leaks this quarter" → maintenance review trigger).

## Open the page

**Configuration → Safety Standards → Repair Requests.**

The table shows:

Column	Meaning
Label	The display name on the mobile dropdown.
Category	Mechanical / Electrical / Hydraulic / Pneumatic / Structural / Instrumentation / Other.
Active	On / off toggle.
Usage count	How many repair requests in the last 30 days used this type.

## Create a type

---

### 1. New repair request type.

### 2. Fill in:

Field	Notes
Label	Concise — fits on a mobile dropdown. "Seal leak", "Motor over-temp", "Vibration".
Category	Pick from the six. Drives aggregation in reports.
Description (optional)	Help text shown on mobile when the technician hovers / long-presses the option.

### 3. Save.

## Edit

---

Click a row → **Edit**. Changes propagate immediately to new submissions. Historical submissions keep the old label for report integrity.

## Deactivate or delete

---

- **Deactivate** — removes from mobile dropdown, keeps in reports. Reversible.
- **Delete** — permanently removes. Blocked if any repair request references the type.

Prefer deactivate.

## Good catalogue design

---

### Do:

- 10–30 types total, not 3 and not 100.
- One clear category per type.
- Short labels that fit mobile screens.
- Coverage for your actual failure modes — use the last quarter of repair requests as a sanity check.

### Don't:

- Generic catch-alls ("Other" that's picked 80% of the time — split it).
- Ambiguous overlap ("Seal leak" and "Oil leak" without a clear distinction).
- Vendor-specific language your technicians don't use.

## Seeding

On a new installation, start with a conservative list (~15–20 common types) and expand based on what technicians actually file. Watch the "description" field of incoming requests — patterns you see in free text are candidates for new types.

## Bulk import

CSV import supported:

```
label,category,active
Seal leak,Hydraulic,1
Bearing failure,Mechanical,1
...
```

## Things to watch for

### DON'T OVER-SPLIT AT FIRST

A catalogue of 100 highly-specific types fragments your reports. 15–30 broader types produce clearer aggregations. Split later if a category consistently hides multiple distinct patterns.

### KEEP 'OTHER' AS AN ESCAPE HATCH

Always include 'Other' so technicians aren't blocked. But monitor how often it's picked — if >10%, your catalogue is missing common types.

## Related topics

- [Safety Standards](#) — parent category.
- [Shutdown Reasons](#) — sibling catalogue.
- [Repair requests \(mobile\)](#) — where technicians file.
- [Reports > Repair Request Report](#) — aggregates by type.
- [Master data \(reference\)](#)

# Shutdown Reasons

The master catalogue of causes that technicians pick from when reporting a shutdown.

## REQUIRED ROLE

Mapper or Admin.

## Overview

When a technician reports a shutdown from the mobile app, they choose a **reason** from a dropdown. This page manages that dropdown.

Shutdown reasons drive the **Shutdown Report**, **Asset Availability**, and **OEE Report** — getting the taxonomy right directly affects the quality of those reports.

## Open the page

**Configuration → Safety Standards → Shutdown Reasons.**

The table shows:

Column	Meaning
Label	Display name on the mobile dropdown.
Category	Planned / Unplanned / Force Majeure / Other.
Active	On / off toggle.
Usage count	How many shutdowns in the last 30 days cited this reason.

## Create a reason

1. **New shutdown reason.**
2. Fill in:

Field	Notes
Label	Concise. "Equipment failure", "Planned maintenance", "Power outage".
Category	<b>Planned</b> (pre-arranged maintenance, change-over), <b>Unplanned</b> (breakdowns, safety stops), <b>Force Majeure</b> (utility outages, external supply issues), or <b>Other</b> .
Description (optional)	Help text.

3. Save.

## Category matters for OEE

---

The category you assign drives whether the shutdown counts against availability:

- **Planned** → excluded from unplanned-downtime metrics. Availability unaffected.
- **Unplanned** → counts against availability. Drives the main OEE signal.
- **Force Majeure** → often excluded from operational metrics (your installation's OEE Report may handle this differently).
- **Other** → counts toward unplanned unless configured otherwise.

Miscategorising a reason (marking "Equipment failure" as Planned, for example) hides real downtime. Review quarterly.

## Edit, deactivate, delete

---

Same pattern as [Repair Request Types](#).

## Good catalogue design

---

- **Short labels** — fit on mobile.
- **Clear categories** — when in doubt, Unplanned.
- **10–20 reasons total** — cover 95% of real shutdowns.
- **"Other"** present but watched — >10% usage means your catalogue is missing common reasons.

## Typical starter catalogue

---

For a new installation:

Label	Category
Equipment failure	Unplanned
Safety trip	Unplanned
Tooling change	Planned
Planned maintenance	Planned
Quality issue	Unplanned
Material shortage	Unplanned
Power outage	Force Majeure
Change-over / product changeover	Planned
Operator absence	Unplanned
Other	Unplanned

Tune from actual usage patterns in the first 1–2 months.

## Things to watch for

### DON'T RELABEL HISTORICAL SHUTDOWNS VIA CATEGORY CHANGES

Changing a reason's category changes **how new shutdowns** are attributed. Historical shutdowns stay with the category they had at reporting time unless you re-run them (which is a support escalation).

### PLANNED SHUTDOWNS ARE USUALLY LOGGED ON THE WEB

Most planned shutdowns are created by a Supervisor on the web portal **before** the stop. Technicians use the mobile reason list primarily for **unplanned** events.

## Related topics

- [Safety Standards](#) — parent category.
- [Repair Request Types](#) — sibling catalogue.
- [Shutdowns \(web portal\)](#) — manage shutdowns.
- [Reporting a shutdown \(mobile\)](#) — where technicians pick.
- [Reports > OEE Report + Shutdown Report](#)

# Asset Setup

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# Asset Setup

---

Configure the reference tables that shape how assets are defined: Production Sites, Components, Component Tasks, Thresholds, and Units.

## REQUIRED ROLE

Mapper or Admin.

## Overview

---

Where [Mapping](#) is about building the specific instances of assets in your plant, **Asset Setup** is about configuring the reusable definitions those instances draw from:

- **Production Sites** — the top-level locations in your tenant.
- **Components** — the reusable equipment-type definitions (pump, motor, mill, conveyor).
- **Component Tasks** — which tasks apply to each component type.
- **Thresholds** — min / max acceptable values for numeric measurements.
- **Units** — measurement units (bar, °C, litres) and their conversion factors.

Changes here propagate to every asset that references them — so it's the highest-leverage configuration page in the platform. Get the models right here and everything downstream flows.

This menu item expands into five sub-items — one page each.

## Submenu

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- [Production Sites](#) — top-level physical locations.
- [Components](#) — reusable equipment-type definitions.
- [Component Tasks](#) — which tasks apply to which component type.
- [Thresholds](#) — numeric-field range validation.
- [Units](#) — measurement units and conversions.

## Typical configuration order

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New installation:

1. **Production Sites** — create the physical locations first.

2. **Units** — define the measurement units you'll use.
3. **Thresholds** — define the ranges (references Units).
4. **Components** — define the equipment types.
5. **Component Tasks** — attach task definitions to each component.
6. Then build the hierarchy in [Mapping](#), linking each asset to a component.

Reverse the order and you'll hit "please pick a unit first" style dependencies.

## Things to watch for

---

### CHANGES PROPAGATE

Editing a component, threshold, or unit ripples to every asset / task that references it. Test on a single asset before bulk-applying a change.

### REVIEW ANNUALLY

Asset Setup is where stale configuration hides. Schedule an annual review with your Mapper + a representative technician.

## Related topics

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- [Production Sites](#)
- [Components](#)
- [Component Tasks](#)
- [Thresholds](#)
- [Units](#)
- [Mapping](#) — building the concrete hierarchy.
- [Configuration options](#)
- [Mapper handbook](#)

# Production Sites

Manage the top-level physical locations in your company — one entry per plant, factory, or facility.

## REQUIRED ROLE

Mapper or Admin.

## Overview

A **Production Site** is the root of the asset hierarchy. Each production site typically corresponds to one building, plant, or geographic facility. Every Line, Section, Asset, and Task Point sits under a Production Site.

Most companies have one or two production sites. Multi-site enterprises can run dozens. The platform makes no practical limit.

## Open the page

**Configuration → Asset Setup → Production Sites.**

The list shows:

Column	Meaning
Name	Human label.
Address	Physical location.
Timezone	Overrides the company-wide default if this site is in a different zone.
Active	On / off toggle.
Line count	How many production lines under this site.

## Create a production site

1. **New production site.**
2. Fill in:

Field	Notes
<b>Name</b>	Short, stable. "Bandung Plant", "Medan Facility".
<b>Address</b>	Physical address — shows on printable reports.
<b>Timezone</b>	Defaults to company timezone. Override if this site is in a different zone.
<b>Contact</b> (optional)	Site lead's email / phone for reference.
<b>Logo</b> (optional)	Site-specific logo for reports scoped to this site.

3. Save.

## Edit

---

Rename, re-address, change timezone. **Timezone changes** affect when schedules fire at this site — coordinate before changing mid-operation.

## Deactivate a production site

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For decommissioned sites:

1. Open the site → **Deactivate**.
2. The site is hidden from user dropdowns and new scheduling.
3. Historical reports retain the site for audit.

Reactivation is reversible.

## Delete

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Only for sites created in error. Blocked if any lines / assets exist under the site — delete or move those first. See [Recycle Bin](#) for recovery.

## User scoping

---

Users can be scoped to a subset of production sites — they see only that site's data. Configure at [User Setting](#) → [User List](#) → user's detail page.

## Things to watch for

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### **TIMEZONE CHANGES RIPPLE**

Changing a site's timezone shifts every schedule and report-boundary for that site. Coordinate, schedule a maintenance window, and verify.

### **ONE SITE PER PHYSICAL LOCATION, ALWAYS**

Don't split a single plant into multiple "sites" just to model shifts or crews — that belongs in user scoping and roles.

## Related topics

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- [Asset Setup](#) — parent configuration.
- [Mapping](#) — the five-level hierarchy that starts with Production Sites.
- [User List](#) — scoping users to sites.
- [Companies](#) — the tenant level above production sites (PegotecUser only).

# Components

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Manage the component catalogue: reusable equipment-type definitions with their options, remarks, and the tasks that apply to each component.

## REQUIRED ROLE

Mapper or Admin.

## Overview

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A **component** is an equipment-type template. Instead of configuring every asset from scratch — defining its fields, its tasks, its thresholds — you define a **component** once and reuse it across every asset of that type.

Examples:

- "Centrifugal pump" — a component that captures the common maintenance profile of every centrifugal pump in your plant.
- "V-belt drive" — defines the checks that apply to any V-belt drive.
- "Vertical mill spindle" — the task set for every spindle.

When you link an asset to a component, the component's **default task set** is inherited by the asset. A new task on the component propagates to every asset that references it. This is where component management pays off: maintaining a task on one component is a single edit; maintaining it on 40 individual assets is a nightmare.

## Prerequisites

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- You have the Mapper or Admin role.
- You've thought about what component types exist in your plant — talk to the maintenance team to match their mental model.

## Open the components page

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**Components** in the sidebar. You see two sub-views:

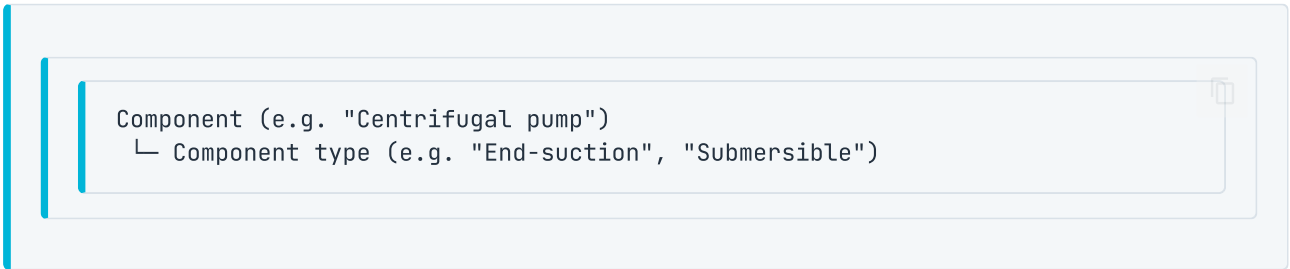
- **Components tree** — the component catalogue (the definitions).

- **Component-task tree** — mappings between component types / subtypes and the tasks that apply.

## Components tree

### Structure

Components form a small two-level tree:



A component can have one or more **component types** — subtypes that share most configuration but differ in some specific options (e.g. a submersible pump has different lubrication than an end-suction).

### Create a component

1. Click **New component**.
2. Fill in:

Field	Notes
Name	Short, descriptive ("Centrifugal pump", not "Pump_v2").
Description	Optional.
Order	Display order in the tree.

3. Save.

### Add a component type

Inside a component:

1. Click **New type**.
2. Name the type ("End-suction").
3. Save.

## Add options

Each component type can have **options** — the fields that appear on tasks executed on assets of this component type. Common option kinds:

- **Unit** — link to a master-data unit (°C, bar, l/min). Feeds numeric fields.
- **Type** — a dropdown with a finite option list (condition: good/fair/poor).
- **Text type** — free-text labels for notes.

To add an option:

1. Open the component type.
2. Click **Add option**.
3. Pick the option kind.
4. Configure it (label, linked unit, dropdown values, etc.).
5. Save.

## Add remarks

Remarks are short editorial notes attached to a component ("this pump class typically fails at the seals — inspect seal first" kind of thing). They show up on the mobile app when a technician opens a task on an asset linked to this component.

1. Open the component.
2. Click **Add remark**.
3. Enter the remark name and text.
4. Save.

Remarks are advisory — they don't gate any action, just inform.

## Component-task tree

---

This is where you map component types to tasks. The mapping means "every asset of this component type gets this task by default".

### How it works

1. Select a component type on the left.
2. The right panel shows the tasks currently linked.
3. Add tasks from the global task catalogue or create new ones inline.
4. Configure any task-specific options that override the component-type defaults.

When you link an **asset** to this component type, the linked tasks become that asset's default task set.

## Propagation

- **Adding** a task to a component type → appears on all linked assets going forward. Existing task instances already generated for those assets aren't retroactively changed.
- **Editing** a task on the component type → future instances pick up the change; existing ones don't.
- **Removing** a task from a component type → assets stop getting new instances of that task. Existing instances remain until completed.

## Linking an asset to a component

---

From the [Asset hierarchy](#) page:

1. Open the asset's detail page.
2. Edit the **Component type** field.
3. Pick a component type.
4. Save.

The asset now uses the component's default task set. You can still add asset-specific tasks on top if the asset has quirks that don't generalise.

## Common patterns

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### One component per equipment class

Create a component for each distinct class of equipment in your plant. Don't over-split: if 20 pumps all need the same 5 tasks, they should share one component type, not 20.

### Subtypes for variants

Use component types (subtypes) when a class has meaningful variants that affect tasks:

- "Motor" with types "AC induction", "DC", "Servo".
- "Pump" with types "Centrifugal", "Positive displacement", "Peristaltic".

## Review before mass-linking

Before you link 200 assets to a new component, pick 5 representative assets and link them first. Execute a few tasks. Confirm the form makes sense. Then scale up.

## Deleting components

- **Delete a component type** that's linked to assets → those assets lose their component assignment. Tasks they already have remain, but future task-generation based on component defaults stops.
- **Delete a component** → all its types are deleted; all linked assets become unassigned.

Be very careful with delete. Deactivate where possible.

## What you can do that other roles can't

- CRUD on components, component types, options, remarks.
- Map component types to tasks.
- Configure how a new asset's defaults come from its component.

## Things to watch for

### RENAMES RIPPLE QUIETLY

Renaming a component doesn't break linked assets, but report headers and mobile UI labels update. Warn users before renaming something heavily used.

### START SIMPLE

A good first pass: 5–10 components covering 80% of your plant, each with 3–5 tasks. Refine over months. Over-engineering at the start wastes time.

### COMPONENTS VS HIERARCHY

The hierarchy is **physical** (where equipment is). Components are **logical** (what kind of equipment it is). Don't conflate them.

## Troubleshooting

---

Problem	Fix
New task on component isn't appearing on assets	Generation happens at schedule-time for scheduled tasks; ad-hoc tasks aren't auto-created
Can't delete a component	It's linked to assets — unlink or reassign first
Option doesn't show on the mobile form	The task attached to the component needs to reference the option explicitly
Remark doesn't appear on mobile	Remarks only appear for tasks executed on assets of the remark's component type

## Related topics

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- [Asset hierarchy](#) — where components meet assets.
- [Master data](#) — units and thresholds referenced by component options.
- [Task types](#) — the types that tasks on components can take.
- [Scheduling](#) — turning tasks into recurring work.
- [Mapper handbook](#)

# Component Tasks

---

Map tasks to component types so every asset of that type inherits the right default task set.

## REQUIRED ROLE

Mapper or Admin.

## Overview

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A **component** (see [Components](#)) defines an equipment type — "centrifugal pump", "V-belt drive", "vertical mill spindle". **Component Tasks** is where you link specific tasks to those types. The linkage means: "every asset of this component type gets this task by default."

Without component tasks, you'd have to attach tasks to each asset individually. With component tasks, one definition covers all 20 similar pumps in your plant.

## Open the page

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**Configuration → Asset Setup → Component Tasks.**

You see the component-task tree:

- Left pane: list of component types (from [Components](#)).
- Right pane: the tasks currently linked to the selected component type.

Click a component type on the left to see its tasks on the right.

## Link a task to a component type

---

1. Select the component type in the left pane.
2. Click **Add task**.
3. Either pick an existing task from the catalogue or create a new one inline.
4. Configure task-specific options that override the component-type defaults (thresholds, required photos, safety procedure).
5. Save.

New assets of this component type inherit the task going forward. Existing assets inherit the task on next sync; **existing task instances are not retroactively changed**.

## Edit a linked task

Click the task in the right pane → **Edit**. Changes apply to **future** generated instances. In-progress and historical task instances keep their original parameters.

## Unlink a task

Click the task → **Remove from component**.

- Assets of this component type stop generating new instances of this task.
- Existing task instances already in the queue or history are untouched.

## What propagates vs what doesn't

Change	Affects future instances	Affects existing instances
Add a task to a component type	☐	—
Edit a task on a component type	☐	—
Remove a task from a component type	☐ (stops generating)	— (existing ones remain)
Change a task's form fields	☐	—
Change an attached safety procedure	☐	—

The rule: **component-task changes always move forward in time**. If you need to change an in-flight instance, edit that instance directly — not the component-task mapping.

## Typical component-task profile

For a centrifugal pump, a typical mapping might be:

- Daily visual inspection (Maintenance task type).
- Weekly vibration reading (Maintenance with numeric field + threshold).
- Monthly lubrication of the drive-end bearing (Lubrication task type).
- Quarterly alignment check (Maintenance).
- Annual tear-down inspection (Maintenance, high safety).

You define these once. Every asset linked to "centrifugal pump" inherits all five.

## Bulk-apply to existing assets

---

Adding a task to a component type doesn't retroactively create instances on existing assets. If you want existing assets to start getting a new scheduled task:

1. Add the task to the component type.
2. Create or edit the associated schedule in [General Schedule Setup](#) — it starts generating instances on the next fire.
3. Existing assets of the component type get the new instances from that point forward.

## Things to watch for

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### TEST ON ONE ASSET FIRST

Adding a task that generates instances on 200 pumps all at once is a big workload bump. Link the task, run a schedule for one pump for one cycle, confirm it executes correctly, then broaden.

### NAMING CONSISTENCY HELPS

Keep task names consistent across component types ("Weekly grease inspection" vs "Weekly-grease-check") — reports aggregate cleaner.

## Related topics

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- [Components](#) — define the component types.
- [Asset Setup](#) — parent configuration category.
- [Mapping](#) — concrete assets that inherit.
- [General Schedule Setup](#) — turn linked tasks into recurring work.
- [Task types](#)

# Thresholds

Define the min / max acceptable values for numeric measurements. Thresholds drive the red / amber / green highlighting technicians see when they enter a value on mobile.

## REQUIRED ROLE

Mapper or Admin.

## Overview

A **threshold** is a range definition attached to a unit. When a task has a numeric field bound to a threshold, the mobile form highlights the value based on whether it's inside or outside the range:

- **Green** — inside range.
- **Amber** — at the edge of the range (if you configured soft limits).
- **Red** — outside the range.

Highlighting is advisory — the form still submits out-of-range values — but it's a strong visual cue for both the technician (who may retry) and the approving Supervisor.

## Open the page

**Configuration → Asset Setup → Thresholds.**

Columns:

Column	Meaning
Label	Descriptive — "Motor bearing temperature max", "Discharge pressure range".
Unit	From the <a href="#">Units</a> master list.
Minimum	Lower bound. Blank if unbounded.
Maximum	Upper bound. Blank if unbounded.
Soft min / Soft max	Optional amber-warning bounds inside the hard range.
Active	On / off toggle.

## Create a threshold

---

### 1. New threshold.

### 2. Fill in:

Field	Notes
<b>Label</b>	Specific and self-explanatory.
<b>Unit</b>	Pick from Units. If the unit doesn't exist, add it there first.
<b>Minimum</b>	Optional hard lower bound.
<b>Maximum</b>	Optional hard upper bound.
<b>Soft minimum</b>	Optional — values below this but above Minimum highlight amber.
<b>Soft maximum</b>	Optional — values above this but below Maximum highlight amber.
<b>Description</b>	Optional internal notes.

### 3. Save.

## Using a threshold on a task

---

A threshold is referenced from a numeric field on a task:

1. Open a task.
2. Edit the numeric field.
3. In the **Threshold** dropdown, pick the matching threshold.
4. Save.

When the technician enters a value on mobile, the form colours the cell by comparing the entered value to the threshold's bounds.

## Staged thresholds

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The cleanest pattern for safety-relevant measurements:

- **Hard limits** (Minimum / Maximum) — values outside are a problem you want flagged red.
- **Soft limits** (Soft min / Soft max) — values close to the hard limit are a warning you want flagged amber.
- **Between soft limits** — value is green, no action needed.

For a motor bearing temperature where 60 °C is the designed ceiling:

- Minimum: (blank — temperatures below ambient aren't a realistic concern)
- Soft maximum: 50 °C
- Maximum: 60 °C

Readings < 50 °C → green. 50–60 °C → amber. > 60 °C → red.

## Review cadence

Every 3–6 months, review threshold values against the actual distribution of readings in the reports. If you never see red, your thresholds may be too loose. If everything's red, they're too tight.

## Things to watch for

### DON'T RETROACTIVELY TIGHTEN THRESHOLDS AND EXPECT DATA TO CHANGE

Changing a threshold affects **future** readings. Historical submissions carry the colour they had at submission time.

### START LOOSE, TIGHTEN WITH DATA

For a new installation, start with loose thresholds. After a few months of real data, tighten progressively using the actual distribution as your guide.

### THRESHOLDS ARE UNIT-BOUND

A threshold in °C can't be applied to a field measured in psi. If you change the unit on a field, the threshold reference breaks until you re-assign.

## Troubleshooting

Problem	Fix
Technician sees red highlighting everywhere	Threshold may be too narrow — widen
No highlighting despite out-of-range value	Threshold may not be bound to that field; check task setup
Can't pick a unit	Add it in <a href="#">Units</a> first

## Related topics

- [Units](#) — the measurement units thresholds reference.
- [Asset Setup](#)
- [Task types](#)

- [Executing a task \(mobile\)](#) — where the highlighting appears.

# Units

Maintain the list of measurement units used across tasks, thresholds, and products.

## REQUIRED ROLE

Mapper or Admin.

## Overview

A **unit** is a measurement unit (°C, bar, litre, hour, metre-per-second) that numeric fields attach to. Units feed:

- **Tasks** — every numeric field references a unit.
- **Thresholds** — every threshold references a unit.
- **Products** — the unit quantities are recorded in (ml, g, l, pcs).

Without the right units in your catalogue, you can't configure tasks or thresholds accurately.

## Open the page

**Configuration → Asset Setup → Units.**

Columns:

Column	Meaning
<b>Name</b>	Display name.
<b>Symbol</b>	Short symbol used in tables and forms ("°C", "bar", "l").
<b>Type</b>	Temperature / Pressure / Flow / Volume / Mass / Length / Time / Count / Other.
<b>Conversion factor</b>	Optional — relative to the canonical unit of that type.
<b>Active</b>	On / off toggle.

## Create a unit

1. **New unit.**
2. Fill in:

Field	Notes
Name	Descriptive — "Celsius", "Bar absolute".
Symbol	Short display form — "°C", "bar".
Type	Pick from the list; determines which conversion factor is meaningful.
Conversion factor	Optional. If you have both <code>bar</code> and <code>psi</code> , store the conversion (1 bar = 14.504 psi).
Description	Optional internal notes.

3. Save.

## Typical starter catalogue

For most plants:

Name	Symbol	Type
Celsius	°C	Temperature
Bar	bar	Pressure
Ampere	A	Current
Volt	V	Voltage
Millilitre	ml	Volume
Litre	l	Volume
Gram	g	Mass
Kilogram	kg	Mass
Hour	h	Time
Minute	min	Time
Megohm	MΩ	Electrical resistance

Add industry-specific units (e.g. `rpm`, `psi`, `kPa`, `NTU`, `°F`) only if your team actually uses them.

## Conversions

If you keep multiple units for the same type (bar and psi for pressure, °C and °F for temperature), the conversion factor lets reports aggregate across both.

For bar (canonical) and psi, the factor on psi would be **0.0689476** (1 psi = 0.069 bar).

If your whole plant standardises on one unit per type, you can ignore conversions.

## Edit, deactivate, delete

---

Same pattern as other master data. Deactivate retired units; delete only mistakes.

### CAN'T DELETE A REFERENCED UNIT

The system blocks deleting a unit that's referenced by any task, threshold, or product. Unlink or reassign first.

## Things to watch for

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### DON'T USE THE SYMBOL AS THE NAME

"°C" is the symbol; "Celsius" is the name. Name → displayed in lists. Symbol → displayed in forms next to numeric fields. Both matter.

### ONE CANONICAL PER TYPE

Pick one canonical unit per type (bar for pressure, °C for temperature, litres for volume) and try to use it everywhere. Mixing is technically possible via conversions but operationally confusing.

## Related topics

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- [Thresholds](#) — units are a prerequisite for thresholds.
- [Products](#) — quantities are stored in units.
- [Asset Setup](#)

# User Setting

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# User Setting

The umbrella menu for every page related to user access, identity, and activity across the company.

## REQUIRED ROLE

Admin. Some sub-items (Companies, Activity Log) require PegotecUser.

## Overview

**User Setting** is the **Configuration → User Setting** submenu. It groups six related pages that share the theme of "who has access and what have they been doing":

- [Companies](#) — tenant management (PegotecUser only).
- [User List](#) — create, edit, deactivate users.
- [Roles](#) — define permission sets.
- [Mobile Setup \(QR\)](#) — generate QR codes for mobile pairing.
- [Languages](#) — manage the translation catalogue.
- [Activity Log](#) — audit trail.

## When to use which

You want to...	Open
Add or edit a user	User List
Change a user's role	User List
Pair a new mobile device	Mobile Setup (QR)
See who did what	Activity Log
Define a new custom role	Roles
Add a new language	Languages
Register a new customer tenant	Companies ( <i>PegotecUser only</i> )

## Typical initial setup sequence

---

On a new installation, work this menu top-to-bottom:

1. **Companies** — already exists; verify your tenant is configured.
2. **Roles** — review the seven built-in roles; create custom roles only if needed.
3. **User List** — invite the initial team.
4. **Mobile Setup (QR)** — once the team has accounts, generate a QR for the field devices.
5. **Languages** — verify the languages your team needs are listed.
6. **Activity Log** — leave alone initially; it fills itself.

## Things to watch for

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### **MOST DAYS YOU ONLY TOUCH USER LIST + ACTIVITY LOG**

Other pages stabilise after initial setup. User List and Activity Log are the ongoing operational surfaces.

## Related topics

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- [Companies](#)
- [User List](#)
- [Roles](#)
- [Mobile Setup \(QR\)](#)
- [Languages \(admin\)](#)
- [Activity Log](#)
- [Admin handbook](#)

# Companies

Create, edit, and manage tenant companies in the platform.

## REQUIRED ROLE

PegotecUser — cross-tenant operation. Customer Admins don't see this page; they configure their own company in [Profile and settings](#).

## Overview

Each **company** is a tenant — a scoped set of users, assets, tasks, reports, and settings. In a single-installation, multi-tenant deployment, the **Companies** page is where Pegotec staff create new tenants, regenerate their API tokens (for mobile pairing), and manage activation / deactivation.

Customer Admins never see or need this page. If you're an Admin reading this, you're in the wrong role — jump to [Profile and settings](#) for company-level configuration inside your own tenant.

## Prerequisites

- You have the PegotecUser role.
- You have context on the customer you're onboarding (name, environment, billing status).

## Open the companies page

**Companies** in the sidebar (visible only to PegotecUser). The list shows:

Column	Meaning
Name	Customer company name.
Environment	production / staging / development.
Users	Count of active users.
Active	On / off toggle.
Created	When the company was provisioned.

## Create a company

### 1. Click New company

### 2. Fill in the form

Field	Required	Notes
<b>Name</b>	Yes	Customer-visible. Appears in their portal header and email notifications.
<b>Environment</b>	Yes	production / staging / development. Non-production environments are for internal testing.
<b>Base URL</b> (if multi-URL installation)	Conditional	The URL the customer will use.
<b>Timezone</b>	Yes	Customer's primary timezone. Drives all scheduling and report boundaries.
<b>Default language</b>	Yes	Seeds new user accounts.
<b>Contact email</b>	Recommended	Goes to your internal records, not customer-facing.

### 3. Save

The company is created in an inactive state.

### 4. Copy the API token

Immediately after creation, the portal shows the generated **API token** once:

#### **COPY NOW OR REGENERATE LATER**

This is the only time the token is shown in full. If you miss it, you'll have to regenerate — which invalidates the original and requires the customer to re-pair any mobile devices.

Copy the token into your password manager. You'll need it when the customer wants to provision their first mobile device (the token is encoded into the QR code they scan).

### 5. Activate the company

Once you've tested the configuration (created a test user, signed in, ran one task), flip **Active** to on. The customer can now sign in.

## Regenerate the API token

When to regenerate:

- Scheduled rotation (quarterly is typical).
- Suspected token leak.
- Staff turnover on your side.

## Steps

1. Companies → (row) → **Details**.
2. **Regenerate API token**.
3. Confirm in the warning modal.
4. **Copy the new token immediately** — same rule as first creation.
5. Communicate to the customer — they'll need to re-pair mobile devices with the new QR code.

### **MOBILE DEVICES NEED RE-PAIRING**

Once you regenerate the token, every paired mobile device fails authentication. The customer should re-pair all field devices on a coordinated rotation so nobody loses a day of work.

## Edit a company

---

Companies → (row) → **Edit**. You can change:

- Name.
- Timezone.
- Default language.
- Contact email.

Environment and Base URL are usually **not editable** after creation — changing them would break every paired mobile device. If you need to move a company to a different environment, create a new one and migrate data.

## Activate / deactivate

---

### Deactivate

Reversible. Stops all access without deleting data.

- **Temporary pause:** contract dispute, extended maintenance window, customer on sabbatical.
- Users can't sign in.
- Scheduled tasks continue to generate in the background unless you also pause scheduling.
- Data stays intact.

## Reactivate

Flip back. Users can sign in immediately.

## Delete a company

---

Rare. Only when:

- The customer was created in error.
- The customer has formally offboarded and retention policy says delete.

### **DELETION IS DESTRUCTIVE**

All users, tasks, assets, reports, and photos are gone permanently. Run a data export first if your retention policy requires it.

1. Companies → (row) → **Delete**.
2. Type the company name to confirm.
3. Click **Delete permanently**.

## Link / unlink users

---

When a customer needs a user that exists in another company:

1. Open the company.
2. **Users** tab.
3. **Add existing user** — picks from the global user list (PegotecUser-only view).
4. Pick the user.
5. Save.

The user now has access to both companies. Their effective role in each company is independent.

This is rare. Most users belong to exactly one company.

## Multi-company users (PegotecUser only)

---

Only PegotecUser can belong to multiple companies and switch between them. For customer users, one-user-one-company is the norm.

## Things to watch for

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### **⚠️ DON'T ONBOARD CUSTOMERS IN PRODUCTION FIRST**

Create the staging tenant first. Smoke-test there. Then create the production tenant. Mixing up staging and production in early config is easy to do and painful to undo.

### **📄 DOCUMENT THE TOKEN STORAGE**

Put a pointer in your customer's support ticket: where is their token stored internally. When someone else picks up the account, they shouldn't have to dig for it.

### **🗑️ DELETING A COMPANY IS IRREVERSIBLE**

Consider the long tail — auditors may want historical data years later. Deactivate unless policy truly requires deletion.

## Common patterns

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### New customer onboarding

1. Create staging tenant first.
2. Copy staging token → send to customer for staging pairing.
3. Customer smoke-tests end-to-end.
4. Create production tenant.
5. Copy production token → customer pairs production devices.
6. Activate production.
7. Hand off account to customer support.

### Customer offboarding

1. Export any data per retention policy.
2. Deactivate (first step — stop access).
3. Wait out any cooling-off period.
4. Delete (if policy requires).

### Environment cleanup

Quarterly: list all companies, sort by Last activity. Anything inactive for > 12 months is a candidate for deactivation or deletion (depending on what it is — customer vs internal test tenant).

## Troubleshooting

---

Problem	Fix
New tenant can't sign in	Confirm the Active toggle is on
Mobile pairing fails	Token may be wrong; regenerate and re-send QR
Reports in the new tenant are empty	Expected on day one — data accumulates as users work
Wrong timezone on reports	Edit company timezone; re-run report
Deleted the wrong company	Data is gone; use audit log to establish timeline; restore from backup is a support escalation

## Related topics

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- [PegotecUser handbook](#) — role overview.
- [User management](#) — users within a single tenant.
- [Profile and settings](#) — customer Admin's equivalent.
- [Pairing and setup \(mobile\)](#) — downstream of the token.
- [Admin handbook](#) — what customer Admins do.

# User management

---

Create, edit, deactivate, and assign roles to users. Manage the seven built-in roles and any custom roles your company has defined.

## REQUIRED ROLE

Admin (full access). Mapper can view users and assign existing roles but can't create custom roles.

## Overview

---

User management lives under **Users** and **Roles** in the sidebar. **Users** is the list of people with accounts; **Roles** is the list of permission sets those people can be assigned to.

A user can hold one or more roles. Their effective permissions are the **union** of all their role's permissions — there's no subtraction or priority ordering.

## Users

---

### Open the users list

**Users** in the sidebar. The table shows:

- Name, email, username.
- Assigned roles (as chips).
- Active / inactive status.
- Last sign-in time.

Sort, filter, and paginate like any other table in the portal. See [Navigating the portal](#).

### Create a user

1. Click **New user**.
2. Fill in:

Field	Required	Notes
Name	Yes	Display name shown in assignments, reports, and the audit log.
Email	Yes	Used for password reset and email notifications. Must be unique.
Username	No	Alternative sign-in identifier. Useful if the user doesn't have a personal email.
Password	Conditional	Set directly <b>or</b> tick <b>Send password reset email</b> to have the user set their own.
Roles	Yes	Pick one or more from the role dropdown.
Production sites	No	Scope the user to specific sites (optional). Leave blank for company-wide access.

### 3. Save.

If you ticked **Send password reset email**, the user receives an email from `noreply@sm-tm.app` with a link to set their password. The link expires in 24 hours.

## Edit a user

Users → (row) → **Edit**.

You can change everything except the email address — changing email requires a support case (to prevent account takeover). Role changes take effect on the user's next token refresh (usually within a minute).

## Deactivate a user

Users → (row) → three-dot menu → **Deactivate**.

The user can't sign in; their data is preserved. Deactivation is reversible — click **Reactivate** in the same menu to restore access.

### Use deactivation when:

- Someone has left the organisation.
- Someone is on extended leave.
- Access needs to be suspended pending investigation.

## Delete a user

Users → (row) → three-dot menu → **Delete**.

Only use this for accounts created by mistake that have no task history. Deleting a user with real task history is destructive — task authorship becomes ambiguous in the audit log.

## **DON'T DELETE THE LAST ADMIN**

If you delete the only user with the Admin role, nobody can manage users anymore. You'll need Pegotec support to intervene. Always keep at least two active Admins.

## **Reset a password**

Users → (row) → **Reset password**. The user receives an email with a reset link. The link expires in 24 hours.

## **Bulk actions**

Select multiple users via checkboxes, then use the bulk action bar:

- **Deactivate selected.**
- **Assign role to selected** — adds the chosen role to every selected user.
- **Export selected as CSV.**

## **Import users from CSV**

When onboarding tens or hundreds of users at once, manual creation is painful. Import instead.

### **Steps**

1. **Users → Import.**
2. Download the template CSV from the link at the top of the import page.
3. Fill in the template in a spreadsheet tool.
4. Upload the completed CSV.
5. The portal shows a **preview** — rows it can import, rows with errors, rows it'll skip as duplicates.
6. If the preview looks right, click **Import**.
7. On completion, the portal shows a success / error summary; errors list the specific row and reason.

Large imports (>1,000 rows) run as a background job; you'll get an email when it's done.

### **CSV format**

Required columns (header row must match exactly):

```
name,email,username,roles,production_sites,active
Alice Smith,alice@example.com,alice.smith,Technician;Mapper,"Bandung
Plant;Medan Plant",1
Bob Jones,bob@example.com,,Supervisor,Bandung Plant,1
```

Column	Required	Notes
name	Yes	Display name.
email	Yes	Unique across the company.
username	No	Optional alt identifier. Leave blank for email-only sign-in.
roles	Yes	One or more, separated by semicolons. Names must match existing role names (built-in or custom).
production_sites	No	Optional scoping. Semicolon-separated. Leave blank for company-wide access.
active	Yes	1 = active, 0 = inactive (rarely useful in import — usually always 1).

**Encoding:** UTF-8 (with or without BOM). **Delimiter:** comma. **Quoting:** only fields containing commas or semicolons. **Line terminator:** any.

### Validation rules

The import rejects rows where:

- An email is missing or malformed.
- An email already exists on a different user (duplicate detection).
- A role name doesn't match an existing role.
- A production site name doesn't match an existing site.
- A required column is blank.

Valid rows import; invalid rows are skipped with a row-level reason in the summary. Re-upload only the corrected rows; you don't need to re-process the successful ones.

### Password handling on import

The CSV doesn't carry passwords. Imported users receive the account-created email with a password-reset link. They set their own password on first sign-in.

If you need to bulk-assign initial passwords (e.g. for a training cohort), create users first via import, then use the bulk **Reset password** action to send fresh reset links at a coordinated time.

## Limits

- **Row cap per upload:** 5,000.
- **File size cap:** 5 MB.
- **Rate limit:** one import running per company at a time.

For larger bulk loads, split into multiple files or contact Pegotec support.

## Roles

---

### The seven built-in roles

Pre-seeded on every installation:

- **Technician** — executes tasks in the field.
- **Mapper** — builds and maintains asset hierarchy, tasks, safety procedures.
- **Supervisor** — assigns and approves work.
- **Manager** — read-only consumption of reports.
- **Admin** — company-level administration.
- **Viewer** — read-only for audit / compliance.
- **PegotecUser** — cross-tenant, Pegotec staff only.

Full permission breakdown: [Permissions matrix](#).

### Create a custom role

1. **Roles** → **New role**.
2. Name the role (descriptive: `Safety Officer`, `Contractor Auditor`, `Night Shift Supervisor`).
3. Tick the permissions from the matrix.
4. Save.

#### START FROM A DUPLICATE

Right-click an existing role → **Duplicate** — then trim permissions from a known-good starting point. Much faster and more consistent than building from scratch.

### Edit a role

Roles → (row) → **Edit**. You can change the name and permission set of any custom role. You can't edit the built-in roles directly — duplicate first.

## Delete a custom role

1. Roles → (row) → **Delete**.
2. The portal warns you if users are still assigned to the role.
3. Reassign those users first, or the deletion is blocked.

You can't delete the built-in roles.

## Assigning roles to users

---

Two ways:

### From the user's side

1. Users → (user) → **Edit**.
2. Open the **Roles** multi-select.
3. Add / remove roles.
4. Save.

### From the role's side

1. Roles → (role) → **Members**.
2. Add or remove users from the membership list.
3. Save.

Changes propagate immediately.

## Multi-role users

---

A user can hold any combination of roles. Their effective permission set is the **union** of all the roles they hold:

- Alice is a Mapper + Admin → she has every Mapper permission plus every Admin permission.
- Bob is a Technician + Supervisor → he can both execute tasks and assign tasks (unusual but supported).

There's no conflict resolution. More roles = more access.

## Production-site scoping

---

Optional. If your organisation has multiple sites and you want to limit a user to one of them:

1. Users → (user) → **Edit**.
2. In the **Production sites** field, pick one or more sites.
3. Save.

The user will see only data scoped to those sites. Leave the field blank for company-wide access.

## The audit log

---

Every user management change leaves a record in the audit log:

- User created.
- Role added / removed.
- User deactivated / reactivated.
- Password reset triggered.
- Email / name changed.

See **Settings** → **Audit log** (admin only).

## Common patterns

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### Onboarding a new technician

1. Create the user with **Send password reset email** ticked.
2. Assign the **Technician** role.
3. Optionally scope to their production site.
4. Send them the QR code for [mobile pairing](#).

### Promoting a technician to supervisor

1. Users → (user) → Edit.
2. Add **Supervisor** role (don't remove Technician unless they've stopped executing).
3. Save.

### Handling a leaver

1. Users → (user) → **Deactivate**.
2. Do **not** delete — their task history stays attached to the account.
3. Note the date in your offboarding checklist.

## Auditing access

1. Reports → Audit log.
2. Filter by user or by action type.
3. Export to CSV for your audit file.

## Things to watch for

### DON'T SHARE ACCOUNTS

Accounts are per-person. Shared accounts break the audit trail. If a whole shift needs dashboard access, create a shared read-only account rather than sharing Alice's.

### ROTATE PASSWORDS ON ROLE CHANGES

When you promote a user to a much more privileged role (e.g. to Admin), prompt them to reset their password as a light security measure.

### EMAIL IS THE IDENTITY

If two users happen to have the same email (because one person is administering another's account), things get confusing quickly. One account, one person, one email.

## Troubleshooting

Problem	Fix
New user can't sign in	<a href="#">I can't log in</a> — usually reset email lost in spam
Role changes don't take effect	Ask the user to sign out and back in; tokens refresh on next sign-in
Can't delete a role	Users are still assigned — reassign first
User sees permissions they shouldn't	They have multiple roles — review their role list
Custom role is missing	You may have deleted it; it's in the audit log

## Related topics

- [Permissions matrix](#) — the 40+ permissions underlying roles.
- [Admin handbook](#) — role overview for the person running this page.
- [Companies \(web portal\)](#) — managing tenants (PegotecUser only).
- [Pairing and setup \(mobile\)](#) — what a new technician does next.
- [Contact support](#) — for issues outside Admin authority.

# Roles

---

Define the permission sets that users are assigned to — the seven built-in roles and any custom roles your company creates.

## REQUIRED ROLE

Admin.

## Overview

---

A **role** is a named bundle of permissions. Users don't hold permissions directly; they hold roles, and each role grants a set of permissions. This keeps access decisions consistent — change the role's permissions, and every user with that role updates on their next token refresh.

Open **Configuration** → **User Setting** → **Roles** to see the list.

## The seven built-in roles

---

Pre-seeded on every installation and used by most organisations as-is:

- **Technician** — executes tasks in the field.
- **Mapper** — builds and maintains asset hierarchy, tasks, and safety.
- **Supervisor** — assigns and approves work.
- **Manager** — read-only consumption of reports.
- **Admin** — company-level administration.
- **Viewer** — read-only for audit and compliance.
- **PegotecUser** — cross-tenant, Pegotec staff only.

See [Permissions matrix](#) for the full permission breakdown.

## View a role

---

Roles → (row). The detail page shows:

- Role name and description.
- Assigned users (link through to each).
- Permission matrix (ticked permissions are granted).

- Creation / last-modified info.

## Create a custom role

Built-in roles cover most cases. Create a custom role only when you need a combination the built-ins don't offer.

1. **New role.**
2. Fill in:

Field	Notes
<b>Name</b>	Descriptive — "Safety Officer", "Night Shift Supervisor", "Contractor Auditor". Avoid clashing with built-in names.
<b>Description</b>	Optional. Document the role's intent so future admins know what it's for.
<b>Permissions</b>	Tick from the 40+ available. Group by domain: task., mapping., report.*, etc.

3. Save.

### DUPLICATE FROM A BUILT-IN STARTING POINT

Instead of building from scratch, duplicate a close match (e.g. Manager → add `task.assign`) and trim / add from there. Faster and more consistent.

## Edit a role

Roles → (row) → **Edit**. Change name, description, or permission set. Changes propagate to existing users on their next token cycle.

You can edit custom roles freely. Built-in roles may be editable but **don't edit them** unless you have a strong reason — future platform updates assume their default permission sets.

## Delete a role

Roles → (row) → **Delete**. Blocked if any users are still assigned. Reassign or deactivate those users first.

## Permission categories

Permissions group by domain. A custom role typically picks from these:

Domain	What it gates
dashboard.*	Dashboard access.
task.*	View / assign / approve / execute tasks.
mapping.*	Asset hierarchy CRUD.
component.*	Components catalogue.
schedule.*	Scheduling setup.
safety.*	Safety procedures.
report.*	Reports view / export.
settings.*	Company-wide settings.
user.* / role.*	User and role management.
mobile.*	Mobile-app-specific features (NFC, execute, report shutdown, etc.).

See [Permissions matrix](#) for the full list.

## Assigning roles to users

Done on the user's detail page, not here. See [User List](#).

## Things to watch for

### DON'T DELETE A ROLE THAT USERS STILL DEPEND ON

The system blocks it, but the better workflow is: reassign users to a replacement role, verify they still work, then delete.

### NAME CUSTOM ROLES UNAMBIGUOUSLY

Don't create a role called "Supervisor Plus" that's actually a variant of Manager — people will misread. Name for the job, not the starting point.

### PERMISSIONS APPLY PER-USER, NOT PER-SESSION

A user who's mid-session when you change their role sees the new permissions on their next action (or within a minute). No sign-out required on their side.

## Troubleshooting

---

Problem	Fix
New role doesn't show in user-edit dropdown	Confirm it's active and saved; refresh
User with role still can't access expected page	Check the page's permission against the role's ticked boxes in the matrix
Can't find a permission	Some are conditional on installation config; check <a href="#">Feature flags</a>

## Related topics

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- [User List](#)
- [User Setting](#) — parent submenu.
- [Permissions matrix](#)
- [Roles and responsibilities](#) — the role overview.

# Mobile setup

---

Generate pairing QR codes so mobile devices can connect to your company's installation in one scan.

## REQUIRED ROLE

Admin (primary). Mapper can also access if your Admin delegates.

## Overview

---

Every mobile device — technician phones, mapper tablets — needs to be **paired** to your company's installation before it can sign in. The **Mobile Setup** page is where you generate the QR codes that pair them.

A QR code encodes:

- The API URL (e.g. `https://api.customer.sm-tm.app`).
- The company context (so users who belong to multiple companies land in the right one).
- Optionally a pre-filled username (useful for shared devices).

Scanning the QR code in the mobile app during [Pairing and setup](#) one-shot configures the app.

## Prerequisites

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- You have the Admin role (or delegated access).
- The user(s) whose devices you're pairing already have accounts — see [User management](#).

## Open the Mobile Setup page

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**Mobile Setup** in the sidebar, or sometimes nested under **Settings** → **Mobile pairing** depending on your installation.

You see:

- The **current installation URL** at the top.
- A large **QR code** that encodes the installation.
- Optional fields to customise what the QR encodes.
- A **Print** button for physical hand-outs.

## Generate a generic QR code

---

For devices where the user will sign in manually after pairing:

1. Open Mobile Setup.
2. Leave the username field blank.
3. Display the QR code on your screen.
4. The user scans it from the mobile app's **Setup → Scan QR code** screen.
5. They enter their email and password on the app's login screen.

Done. A single generic QR is enough for an entire company.

## Generate a user-specific QR code

---

If you want to pre-fill the username for a technician (shared device, kiosk mode):

1. Open Mobile Setup.
2. Type the username (or pick from the user dropdown) into **Pre-fill username**.
3. The QR code regenerates.
4. Show or send to the user.
5. When they scan, their username is already filled — they only type their password.

### PRE-FILLED USERNAME IS NOT AUTHENTICATION

The QR code doesn't log the user in — it only pre-populates a field. The user still types their password. Don't treat it as a credential.

## Printing QR codes

---

For field distribution without sending each user a link:

1. Click **Print**.
2. The portal opens a print dialog with the QR code on an A4 page.
3. Print and distribute to the team (or post at the entrance of the shop floor).

Each printed QR carries the same data as the on-screen version.

## Pairing from the mobile app

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The technician's side:

1. Install the app.
2. Launch → **Setup** → **Scan QR code**.
3. Point the camera at your QR code.
4. The app decodes and pre-fills everything.
5. Sign in with email / password.

See [Pairing and setup \(mobile\)](#).

## Regenerate the underlying token

---

The QR code embeds the installation's **API token**. If the token is rotated — because of scheduled rotation, suspected leak, or a security incident — the QR code also changes. Any previously-scanned QR becomes invalid on the next token refresh.

Token rotation is typically done by PegotecUser on the [Companies page](#). Customer Admins don't rotate tokens themselves.

## When to re-issue QR codes

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- **On installation:** once, generic QR for the whole company.
- **On token rotation:** after a rotation, every device needs re-pairing. Issue a fresh QR.
- **On user account creation:** not needed — the QR is installation-scoped, not user-scoped (unless you use pre-filled username).
- **On factory reset:** the affected device needs to re-pair. A fresh QR scan does it.

## Security considerations

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### A QR CODE IS NOT A SECRET BUT IT IS SENSITIVE

Anyone who scans it can sign in to your installation if they have credentials. Don't post a QR on a public-facing noticeboard.

### GENERIC QR ON SHOP FLOOR, PERSONALISED QR FOR NAMED USERS

Post the generic QR inside the controlled area where devices are provisioned. Send a user-specific QR direct to the user when they receive a new device.

### QR-BASED PAIRING DOESN'T IMPLY USER IDENTITY

Pairing is a one-time device-to-installation handshake. Authentication (who is using the device) happens at sign-in. A paired device without a signed-in user can't do anything.

## Things to watch for

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- **QR code won't scan** — display size too small, camera can't focus, or the printed copy is too small. Enlarge to at least ~4 cm on paper or full-screen on a browser.
- **Wrong installation after scan** — you're showing a QR from a different environment (staging instead of production). Always confirm the installation URL shown above the QR.
- **Pre-filled username doesn't populate** — the mobile app may be an older version that ignores that field. Update the app.

## Troubleshooting

---

Problem	See
Mobile can't reach the installation	Confirm the URL on the QR matches what the device should connect to
Device pairs but login fails	<a href="#">I can't log in</a>
Scan decodes but opens the wrong company	Admin may have generated the QR while scoped to a different company; regenerate
QR unreadable	Print quality / size — regenerate and enlarge

## Related topics

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- [Pairing and setup \(mobile\)](#) — the mobile side of the handshake.
- [User management](#) — creating accounts that will sign in on paired devices.
- [Companies](#) — where PegotecUser rotates the underlying token.
- [Admin handbook](#)

# Languages (admin)

---

Manage the platform's translation catalogue — add or remove supported languages, track per-language coverage, and edit translation keys.

## REQUIRED ROLE

Admin. PegotecUser for cross-tenant translation work.

## NOT THE SAME AS THE USER LANGUAGE SWITCHER

End users change their own language from **Profile** → **Language**. This page is for **admins** who manage which languages the platform supports and the underlying translation keys.

## Overview

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The Languages page is the admin surface for the platform's translation system. It shows every supported language, the per-language **key counts** across three string namespaces (Web Strings, App Strings, Component Strings), and lets you add, edit, or remove languages.

## Open the page

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**Configuration** → **User Setting** → **Languages**.

Page title: **Languages & Translations**.

## The Languages tab

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A table of supported languages with columns:

Column	Meaning
<b>Name</b>	Language name in English (e.g. "German").
<b>Code</b>	ISO 639 locale code (e.g. <code>de</code> ).
<b>Translation</b>	Native-language name (e.g. "Deutsch").
<b>Flag</b>	ISO country code used for the flag icon.
<b>Default</b>	Whether this is the installation's default language.
<b>Web Keys</b>	Count of translated keys in the web-portal namespace.
<b>App Keys</b>	Count of translated keys in the mobile-app namespace.
<b>Component Keys</b>	Count of translated keys in the component / master-data namespace.
Actions	Edit / Delete buttons per language.

An **Add Language** button in the top-right lets you register a new language.

Example state from a production tenant:

Language	Code	Web Keys	App Keys	Component Keys
English	en	0	523	221
German	de	928	523	221
French	fr	896	280	221
Spanish	es	813	280	221
Indonesian	id	754	280	221
Bengali	bn	732	280	221
Chinese	zh	599	280	221
Romanian	ro	504	280	221
Thai	th	254	280	221
Arabic	ar	0	280	0
Dutch	nl	0	280	0
Italian	it	0	280	0
Portuguese	pt	0	280	0
Turkish	tr	0	280	0

(English is the reference — its web-keys count reads 0 because every string is stored as its English form; the other languages show how many translations have been loaded against the English reference.)

## The other tabs

---

Next to **Languages** are three tabs for editing the actual translated strings:

- **Web Strings** — UI strings used by the web portal.
- **App Strings** — strings used by the mobile app.
- **Component Strings** — strings tied to component definitions (labels, remarks, task names) that propagate to mobile.

Each tab opens a filterable table of keys with per-language columns so you can spot missing translations and fill them in.

## Add a new language

---

1. Click **Add Language**.
2. Fill in:
  - **Name** (English) — e.g. "Vietnamese".
  - **Code** — ISO 639 (e.g. `vi`).
  - **Translation** — native name (e.g. "Tiếng Việt").
  - **Flag** — country code for the flag icon (e.g. `vn`).
3. Save.

The new language appears in the list with zero translations. Use the **Web Strings / App Strings / Component Strings** tabs to populate.

## Edit a language

---

Languages → (row) → **Edit language**.

You can change the name, native translation, flag, or default-language flag. The locale **code** is usually **not editable** after creation — it's wired into stored user preferences and changing it orphans them.

## Delete a language

---

Languages → (row) → **Delete language**.

### **DELETION REMOVES THE LANGUAGE FOR EVERYONE**

Users who have this language set fall back to the installation default. Their preference is reset, not carried. Check with Admins before deleting.

Typically you **don't** delete a built-in language. You deactivate in practice by removing it from the supported-languages picker (if your installation surfaces that separately).

## Edit translation keys

Switch to one of the string tabs. Each row is a translation key; each column is a language. Click a cell to edit the translation inline.

Untranslated cells fall back to English in the UI. A large number of untranslated cells in a column shows which language needs attention.

## Where translations go

- **Web Strings** — refreshed on every page load of the web portal.
- **App Strings** — downloaded as a translation bundle on every mobile sync cycle (~15 minutes or Force Sync).
- **Component Strings** — propagate via the same mobile sync.

See [Language and locale](#) for the end-user perspective.

## Cross-tenant translations (PegotecUser)

If you're a PegotecUser, translations are managed centrally by Pegotec across all customers. Per-tenant overrides are possible but exceptional — most tenants consume the central catalogue unchanged.

## Things to watch for

### DON'T RENAME A LANGUAGE CODE MID-FLIGHT

Locale codes are written into every user's profile. Changing `en` to `eng` breaks every user with English set. The UI typically blocks this; if it doesn't, don't.

### TRACK COVERAGE BY COLUMN

The quickest health check: sort by one of the **Keys** columns descending. The bottom of the list is where translation effort is most needed.

### TRANSLATION MODE (FROM YOUR PROFILE DROPDOWN)

Some installations surface a **Translation Mode** toggle in the profile dropdown that shows translation keys inline on every page — useful for spotting untranslated strings while navigating the portal normally.

## Troubleshooting

---

Problem	Fix
New language doesn't appear in user profile picker	It may be filtered out if it has zero translated keys; add a few and re-check
Translation edit doesn't take effect	Refresh the page (web) or Force Sync (mobile)
Deleted language by mistake	Re-add with the same code; translations aren't restored automatically — re-import if you have a backup
Flags missing	Flag codes need to be valid ISO-3166 two-letter country codes

## Related topics

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- [Language and locale \(end-user\)](#)
- [Supported languages](#)
- [User Setting](#) — parent submenu.
- [Admin handbook](#)

# Activity log

---

Audit every create, update, delete, assign, and sign-in action. The activity log is an append-only record of who did what, when.

## REQUIRED ROLE

Admin. Auditors typically access through the Viewer role (read-only) if your installation scopes it that way.

## Overview

---

The activity log is the audit trail of your company's tenant. It answers "who changed this?" and "when did that happen?" questions across:

- User management actions (create / edit / deactivate users, role changes, password resets).
- Hierarchy changes (create / edit / move / delete nodes).
- Task lifecycle events (assign, reassign, submit, approve, reject).
- Master data edits (thresholds, units, products, tools).
- Configuration changes (company settings, feature flags, notification rules).
- Sign-ins and sign-outs.

Every entry is **append-only** — you can't edit or delete entries. That's the point; an audit trail you can alter isn't an audit trail.

## Prerequisites

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- You have the Admin role.

## Open the activity log

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**Settings** → **Activity log**, or **Admin** → **Activity log** depending on your installation.

You see a table:

Column	Meaning
Time	When the action happened, in your timezone.
User	Who did it — includes their role(s) at time-of-action.
Action	create / update / delete / assign / sign_in / etc.
Subject	What the action was on — user, task, asset, etc.
Summary	One-line plain-English summary.
Details	"View details" → full JSON of before / after state.

## Filter the log

A filter bar at the top narrows by:

- **Date range** — day / week / month / custom.
- **User** — pick one or many.
- **Action** — create / update / delete / assign / approve / reject / sign\_in / sign\_out.
- **Subject type** — User / Task / Asset / Component / Shutdown / Repair request / etc.
- **Free-text search** — matches across summary and details.

Filters combine. A typical audit query: "all deletes by user X in October".

## View an entry's full details

Click **View details** on any row. You see:

- The action's timestamp (UTC + local).
- The actor's full name, email, role at that moment.
- The subject (entity type + ID, linked to the current view of that entity if it still exists).
- **Before state** — JSON snapshot of the entity before the change.
- **After state** — JSON snapshot after.
- **IP address** — if your installation records it.
- **User agent** — browser / mobile app + version.

For deletions, "after state" is `null` and "before state" is the last known good snapshot.

## Export

---

Two formats:

- **CSV** — one row per entry, columns same as the table.
- **JSON** — one entry per object in an array, includes full before / after state.

Exports reflect your current filter state. Useful for:

- External audit.
- Compliance packs for certification reviews.
- Incident-response investigation.

For large exports (> 10,000 entries), the portal queues a background job and emails you when the file is ready.

## Retention

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Default retention: **7 years** on most installations (driven by regulatory norms). Customer Admins can't change retention — it's set at the installation level by PegotecUser.

Entries older than the retention window are archived (moved out of the active table) but remain recoverable via a support case for legal / regulatory needs.

## Common investigations

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### "Who deleted this asset?"

1. Activity log.
2. Filter: **Action = delete, Subject type = Asset.**
3. Date range = window you think the deletion happened.
4. Scan the results; look for the matching asset name in the summary.

Result gives you the user, the timestamp, and the before-state so you can recover via [Recycle Bin](#) if still within window.

### "Did user X change the threshold yesterday?"

1. Activity log.
2. Filter: **User = X, Subject type = Threshold.**
3. Date = yesterday.

4. Review the before / after states.

## "Who signed in from IP Y?"

1. Activity log.
2. Filter: **Action = sign\_in**.
3. Search for the IP in the free-text box.
4. Results show every sign-in from that IP (if your installation records IP).

## "Monthly access report for auditor"

1. Date = last full calendar month.
2. Filter: **Action = sign\_in** (or leave broad if the auditor wants everything).
3. **Export → CSV**.
4. Attach to the audit pack.

## What the log does NOT record

- **Read operations** — viewing a task, opening a report. These don't write to the audit log because they'd drown signal-of-interest in background noise.
- **Automatic background jobs** — the scheduler generating daily task instances, the weekly report email. Those are system-level and logged separately if your installation needs them.
- **Mobile device actions that never sync** — a technician who starts a task offline and then uninstalls the app without syncing leaves no trace.

## Things to watch for

### DON'T RELY ON THE LOG FOR REAL-TIME MONITORING

The activity log is an after-the-fact audit. For real-time ops visibility, use the Dashboard and notifications. The log tells you what happened; the Dashboard tells you what's happening.

### FILTER BEFORE YOU SCROLL

With an active plant, hundreds of entries per day are normal. Filters make the log usable — scrolling raw rarely works.

### ENTRIES PRESERVE USER CONTEXT AT TIME-OF-ACTION

If a user had the Supervisor role yesterday and the Mapper role today, yesterday's entry shows them as Supervisor — not whatever their current role is.

## Troubleshooting

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Problem	Fix
An expected entry is missing	Confirm the user was signed in at that time; confirm the action triggered a log entry (reads don't)
Filter returns nothing	Widen the date range first; filters default to tight windows
Export times out	Narrow the range; large exports run as background jobs — watch your inbox
Can't find the "audit log" menu	Your role may not include <code>audit.view</code> — request from an Admin

## Related topics

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- [Recycle Bin](#) — recovering deleted data you found in the log.
- [User management](#) — investigating user changes.
- [Admin handbook](#)
- [Reports](#) — operational metrics (distinct from the audit trail).
- [Contact support](#) — for older-than-retention recovery requests.

# Master data

Manage the reference tables that tasks, components, and reports depend on: thresholds, units, products, tools, repair-request types, and shutdown reasons.

## REQUIRED ROLE

Admin.

## Overview

Master data is the set of small lookup tables that sit under everything else. Tasks reference **units** on their numeric fields. Repair requests reference the **repair-request types** dropdown. Shutdowns reference **shutdown reasons**. Get this data tidy and your reports are meaningful; leave it sloppy and every report is noisy.

On a new installation, master data comes pre-seeded with generic defaults. You almost always need to tailor it to your industry before your team starts executing real work.

## The master-data tables

Table	Drives	Typical size
<b>Units</b>	Numeric fields on tasks.	10–30 entries
<b>Thresholds</b>	Min / max validation on numeric fields.	20–100
<b>Products</b>	Lubrication & consumable catalogue for Lubrication / Repair tasks.	20–200
<b>Tools</b>	Tool registry for Maintenance / Repair tasks.	30–150
<b>Repair-request types</b>	Dropdown for repair request submissions.	10–40
<b>Shutdown reasons</b>	Dropdown for shutdown reports.	10–30

Each table has the same web-portal shape: list → create → edit → delete.

## Units

Measurement units with optional conversion factors.

## Fields

- **Name** — "Celsius", "bar", "litre".
- **Symbol** — "°C", "bar", "l".
- **Type** — Temperature / Pressure / Flow / Volume / Mass / Length / Time / Other.
- **Conversion factor** (optional) — relative to the canonical unit for the type (e.g. if you keep both bar and psi, bar = 14.504 × psi).

## Usage

- Tasks reference units on numeric fields.
- Threshold limits reference units.
- Reports can convert between compatible units when aggregating.

## Tips

- Keep canonical units consistent within a type (pick °C **or** °F, not both, unless you genuinely need both).
- Add conversion factors only for compatible types where your team uses multiple (e.g. bar and psi for pressure).

## Thresholds

---

Min / max acceptable values for a measurement.

### Fields

- **Label** — descriptive ("Motor bearing temperature max").
- **Unit** — linked to the Units table.
- **Minimum** — lower bound. Blank if unbounded.
- **Maximum** — upper bound. Blank if unbounded.
- **Type** — Advisory / Warning / Critical. Drives the colour highlighting on mobile.

### Usage

- Attach a threshold to a numeric field on a task.
- When the technician enters a value, the mobile form highlights it:
  - **Green** — inside range.
  - **Orange** — edge of range (if you configured soft limits).

- **Red** — outside range.

Highlighting is advisory — the task still submits. The intent is to flag the value to both the technician (who may retry) and the Supervisor during approval.

## Tips

- Start conservative and tighten over time as real data accumulates.
- Review quarterly against the histograms in [Reports](#).

## Products

---

Lubrication products and consumables.

### Fields

- **Name** — manufacturer name ("Mobil SHC 624").
- **Category** — Grease / Oil / Cleaner / Sealant / Other.
- **Unit** — the unit quantity is recorded in.
- **Compatible components** (optional) — restricts the dropdown on specific tasks.

### Usage

- Lubrication-type tasks reference a product for the **Product used** field.
- Repair tasks can reference parts used.
- The **Consumption Report** (if available) aggregates quantities per product for reorder.

## Tips

- Match your actual purchasing catalogue. "Generic grease" is useless for procurement.
- Deprecate, don't delete, products that you stop using. Deactivation preserves history.

## Tools

---

The tool registry — specific tools technicians use.

### Fields

- **Name** — "Torque wrench 20-100 Nm", "Megger 500V".
- **Category** — Hand / Power / Measurement / Specialty.

- **Available quantity** (optional) — if your plant tracks tool inventory.

## Usage

- Tasks that require specific tools can reference them so the technician knows what to bring.
- Repair tasks can log tools used for cost / audit purposes.

## Repair-request types

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The dropdown of failure categories on a repair request.

### Fields

- **Label** — the display name on the mobile dropdown.
- **Category** — Mechanical / Electrical / Hydraulic / Pneumatic / Structural / Other.
- **Active** — toggle off without deleting.

### Usage

- Technicians pick from this list when raising a [repair request](#).
- The **Repair Request Report** aggregates by category.

### Tips

- Keep the list short (<30). Long dropdowns on mobile are painful to scroll.
- Use categories for aggregation; labels for specific failure modes.

## Shutdown reasons

---

The dropdown of shutdown causes.

### Fields

- **Label** — "Equipment failure", "Planned maintenance", "Material shortage".
- **Category** — Unplanned / Planned / Force majeure / Other.
- **Active** — toggle off without deleting.

### Usage

- Technicians pick from this list when [reporting a shutdown](#).

- The **Shutdown Report** and **OEE Report** aggregate by category.

## Tips

- Distinguish **Planned** from **Unplanned** clearly — OEE calculations depend on it.
- Review quarterly — add reasons that you find technicians typing into the "description" field repeatedly instead of picking.

## CRUD workflow

---

Same for every table:

### Create an entry

1. **Settings** → **Master data** → (table).
2. Click **New**.
3. Fill in the fields.
4. Save.

### Edit

Click a row → **Edit** → save. Changes propagate immediately to new forms. Already-submitted data keeps the old value for audit integrity.

### Deactivate vs delete

- **Deactivate** — removes from mobile dropdowns, keeps in reports. Reversible.
- **Delete** — removes permanently. Blocked if the entry is referenced by existing data (the system warns you).

Always prefer deactivate.

## Import / export

---

Each master-data table supports CSV import / export. Useful for:

- Initial seeding from an existing catalogue.
- Bulk deactivation / re-categorisation.
- Sharing a curated list between installations.

See [File formats](#) for the CSV format.

## Things to watch for

### RENAMES PROPAGATE; DELETES DON'T

Renaming a unit updates every display everywhere. Deleting a unit that's in use is blocked — but deleting one that's been used historically and is no longer referenced leaves reports with nothing to render against old values. Deactivate.

### DON'T SEED MAXIMALLY

A master-data list of 500 lubricants (most of which you don't stock) makes technician dropdowns unusable. Prune aggressively.

### CONSUMPTION REPORTS DEPEND ON QUANTITIES

If technicians skip the "quantity" field on lubrication tasks, consumption reports are meaningless. Consider making quantity required.

## Troubleshooting

Problem	Fix
Technician can't find a product on mobile	Check it's <b>Active</b> and compatible with the component (if compatibility is configured)
Unit missing on a task	Add to Units table, then reference on the task field
CSV import fails	Check encoding (UTF-8) and header row; see <a href="#">File formats</a>
Report column shows raw IDs instead of names	The referenced master-data entry was deleted; recreate or migrate the report

## Related topics

- [Components](#) — tasks that reference master data.
- [Repair requests \(mobile\)](#) — consumes repair-request types.
- [Reporting a shutdown \(mobile\)](#) — consumes shutdown reasons.
- [Executing a task \(mobile\)](#) — where units, thresholds, products, tools are seen by the technician.
- [Reports](#) — downstream aggregations.
- [File formats](#) — CSV import details.
- [Admin handbook](#)

# Recycle bin

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Recover soft-deleted hierarchy nodes — lines, sections, assets, task points — without calling support.

## REQUIRED ROLE

Mapper or Admin.

## Overview

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When you delete a node in the asset hierarchy, it doesn't disappear immediately. It goes into the **Recycle bin**, where it stays for a retention window (default: **30 days**). During that window, you can:

- **Restore** — put the node back exactly where it was. Its children (if they were also deleted) come back too.
- **Delete permanently** — empty the recycle bin and free the record. This is irreversible.

After the retention window, entries are purged automatically. Anything purged is recoverable only via a support case from backups.

The Recycle bin currently covers the **hierarchy only** (production sites, lines, sections, assets, task points). Other entities — tasks, users, repair requests, shutdowns — have their own lifecycle rules (deactivate / close / archive).

## Prerequisites

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- You have the Mapper or Admin role.
- The entry you're looking for was deleted within the retention window.

## Open the recycle bin

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**Mapping** → **Recycle bin**, or sometimes under **Settings** → **Recycle bin** depending on your installation.

You see a list of deleted items:

Column	Meaning
Name	The node's name at time of deletion.
Type	Production site / Line / Section / Asset / Task point.
Path	Breadcrumb of where it used to live.
Deleted by	Who deleted it.
Deleted at	Timestamp.
Days remaining	Days until permanent purge.

## Restore a node

1. Find the entry in the list.
2. Click **Restore**.
3. Confirm.

What happens:

- The node is put back at its original parent.
- If the parent was also deleted, you'll be asked whether to restore the parent too (it cascades up if needed).
- Tasks, NFC tags, schedules that were attached to the node are **reattached**.
- Reports that referenced the node start showing it again.

### RESTORED TASKS DON'T BACK-FILL

If a restored task had scheduled instances during the deleted window, those instances were never generated. Restoration doesn't retroactively create them.

## Delete permanently

When you're certain a node shouldn't come back:

1. Open the entry.
2. Three-dot menu → **Delete permanently**.
3. Confirm — twice. The second prompt requires typing the node name.

Permanent deletion is irreversible. The only way to get the data back afterwards is a backup-restore support case (assumes your installation retains backups, and may take a working day or two).

## Bulk restore / bulk permanent delete

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Select multiple rows via checkboxes, then use the bulk action bar:

- **Restore selected.**
- **Delete selected permanently** (with confirmation).

Useful after a mistaken bulk-delete in the hierarchy editor — restore the whole batch in one click.

## What's in the bin vs what's not

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Goes into the Recycle bin:

- Production sites, lines, sections, assets, task points.

Doesn't go into the bin (different lifecycle):

- Tasks — closed / completed / cancelled, but not deletable via the recycle bin.
- Users — deactivated or deleted (deletion goes through the Users page, not the recycle bin).
- Repair requests and shutdowns — closed / resolved.
- Master data — deactivated or permanently deleted; not restorable from the bin.

## Retention

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Default: **30 days**. Customer Admins can't change this. If you need a different retention window, raise a support case.

After 30 days, nightly cleanup:

1. Purges entries past retention.
2. Frees the underlying database records.
3. Logs a retention event in the [activity log](#).

## Undoing a cascade delete

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A common mistake: deleting a line also deletes all its sections, assets, and task points. If you realize the mistake quickly:

1. Open the recycle bin.
2. Find the line.
3. Restore.

4. Confirm the cascade restore when prompted — this brings the children back too.

Tasks and tags re-attach automatically. Historical reports rebind on refresh.

## Common patterns

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### Undo a mis-click

You clicked delete on the wrong asset, caught it immediately:

1. Recycle bin.
2. Restore the newest entry.
3. Done — the asset is back where it was.

### End-of-project cleanup

Decommissioning an entire line you built for a trial:

1. Delete the line from the hierarchy (it goes to the bin).
2. Wait out the 30 days to let the recycle window protect against surprises.
3. After retention, the entries purge automatically. No further action needed.

### Panic: I permanently deleted and it's gone

Permanent deletion is irreversible from within the app. Options:

- Check the [activity log](#) for the before-state snapshot — you can recreate the node manually from the JSON.
- Raise a support case for a backup-restore (depending on your SLA).

## Things to watch for

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### PERMANENT DELETE CANNOT BE UNDONE FROM THE APP

The "Permanent delete" button exists for a reason — sometimes you really need the data gone. Use it deliberately.

### RESTORE PARENTS FIRST

If you need to restore a single task point but its parent asset is also in the bin, restore the asset first. The task point then has a place to land.

### RETENTION IS INSTALLATION-LEVEL, NOT PER-COMPANY

All companies on the installation share the same 30-day window. If your policy needs 60 or 90 days, raise it with Pegotec.

## Troubleshooting

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Problem	Fix
Can't find the entry I deleted	Check you're past its retention window — it may already be purged
Restore fails with "parent not found"	Restore the parent first
Restored node doesn't appear in reports	Refresh; WebSocket propagation takes a moment
Don't see the recycle bin menu	Your role may not include <code>mapping.delete</code> — check with your Admin

## Related topics

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- [Asset hierarchy](#) — where deletion is triggered.
- [Activity log](#) — find out who deleted what.
- [Creating hierarchy \(mobile\)](#)
- [Mapper handbook](#)
- [Contact support](#) — for backup-restore requests.

# Mobile app

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# Mobile app

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The mobile app runs on iOS 15+ and Android 7.0+. It's the primary tool for field technicians and mappers.

## Key properties

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- **Offline-first.** The app runs fully offline; work syncs when connectivity returns.
- **Cross-platform.** Same features on iOS and Android, with small UI adjustments where platform guidelines differ.
- **14 languages.** Fully localised, including right-to-left layouts for Arabic.
- **Secure.** Biometric / PIN lock at the app level. Certificate pinning on every API call. Encrypted local database.

## Sections

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### Getting the app set up

- [Installing the app](#)
- [Pairing and setup](#)
- [Biometric unlock](#)
- [Settings](#)

### Executing tasks (technician)

- [Executing a task](#)
- [Task drafts](#)
- [Scanning NFC tags](#)
- [Scanning barcodes](#)
- [Photos and attachments](#)
- [Repair requests](#)
- [Reporting a shutdown](#)

### Mapping (mapper)

- [Browsing the hierarchy](#)
- [Creating hierarchy](#)

- [Writing NFC tags](#)

### **Behind the scenes**

- [Working offline](#)
- [Sync and connectivity](#)
- [Notifications](#)

# Install the mobile app

---

Download and install the Smart Maintenance Task Manager mobile app on your iOS or Android device.

## REQUIRED ROLE

Any mobile-enabled role (Technician, Mapper, Admin, PegotecUser).

## Overview

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The mobile app is distributed through the official app stores on both platforms:

- **iOS** — Apple App Store.
- **Android** — Google Play Store.

It's a free download. You'll need an account created by your Admin before you can sign in.

## Prerequisites

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- A compatible device:
  - **iOS:** iPhone or iPad running iOS 15 or later.
  - **Android:** phone or tablet running Android 7.0 (API 24) or later.
- An account. Your Admin creates accounts — if you don't have credentials yet, ask them first.
- Either a QR code from your Admin, or the API URL in writing. See [Pairing and setup](#).

## Steps

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ios

### 1. Open the App Store

Tap the App Store icon on your home screen.

### 2. Search for "Smart Maintenance Task Manager"

Use the search tab. Pegotec is the publisher.

### 3. Install

Tap **Get** (or the cloud icon if you've installed it before). Authenticate with Face ID, Touch ID, or your Apple ID password.

### 4. Open the app

When installation finishes, tap **Open**.

### 5. Grant permissions as prompted

On first launch, iOS will ask for:

- **Camera** — required for QR pairing, barcode scanning, photo capture.
- **NFC** — optional, needed if you scan NFC tags.
- **Face ID / Touch ID** — optional, for biometric unlock.
- **Notifications** — recommended, so you receive new assignments.
- **Location** (rare, only if your installation uses geo-features) — optional.

Each permission can be changed later in **Settings** → **Smart Maintenance** on iOS.

Android

### 1. Open the Play Store

Tap the Play Store icon.

### 2. Search for "Smart Maintenance Task Manager"

Pegotec is the publisher.

### 3. Install

Tap **Install**. The app downloads in the background.

### 4. Open the app

When installation finishes, tap **Open**.

### 5. Grant permissions as prompted

On first launch, Android will ask for:

- **Camera**.
- **NFC** (only on devices with NFC hardware).
- **Notifications** (on Android 13+, explicitly).
- **Biometric** (fingerprint / face unlock).

Each permission can be changed later in **Settings** → **Apps** → **Smart Maintenance** → **Permissions**.

## After installing

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You land on the **Setup** screen. Continue with [Pairing and setup](#) — you'll need the QR code or API URL from your Admin.

## Updating the app

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Keep the app up to date. Each release can include:

- Bug fixes.
- New task-type support.
- Performance improvements.
- Security updates.

#### ios

Updates install automatically if you have app auto-updates enabled. Otherwise, the App Store shows available updates on the **Updates** tab.

#### Android

Same — automatic by default via the Play Store, or manual from the **Manage apps & device** view.

## Reinstalling

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If you need to reinstall (corrupt install, troubleshooting, moving to a new device):

1. Delete the app.
2. Install again from the app store.
3. Re-pair — see [Pairing and setup](#).

### REINSTALLING WIPES LOCAL DATA

Any unsynced drafts are lost. Check **Pending uploads = 0** before deleting the app. See [Working offline](#).

## Related topics

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- [Pairing and setup](#) — next step after install.
- [System requirements](#) — minimum OS and hardware.
- [Biometric unlock](#) — app-level lock.
- [Your first login](#) — if you're signing in on the web first.

# Pair and set up the app

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Connect the mobile app to your company's installation using a QR code — or enter the API URL manually if QR isn't available.

## REQUIRED ROLE

Any mobile-enabled role (Technician, Mapper, Admin, PegotecUser).

## Overview

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Before you can sign in, the mobile app needs to know **which installation to talk to**. Every company has its own API URL (for example, `api.customer.sm-tm.app`). Pairing the app sets that URL and optionally a company context.

Two pairing methods:

1. **QR code** (recommended) — your Admin generates a QR code from the web portal; you scan it; the app configures itself in one step.
2. **Manual entry** — for cases where QR isn't practical: low-bandwidth site, unusual device, or you're helping someone remotely.

Once paired, the app remembers the configuration until you factory-reset it.

## Prerequisites

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- The app is installed on your device. See [Installing the app](#).
- Your Admin has:
  - Created an account for you.
  - Given you credentials (email / username + password), **and either**:
    - Generated a QR code (from **Mobile Setup** on the web portal), **or**
    - Given you the API URL in writing.

## Pair using a QR code

---

### 1. Open the app

Tap the app icon. On first launch you see the **Setup** screen with two buttons: **Scan QR code** and **Enter URL manually**.

### 2. Grant camera permission

Tap **Scan QR code**. If this is the first camera use, the OS asks for camera permission — tap **Allow**.

### 3. Scan the code

Point the camera at the QR code on your Admin's web portal screen (or a printed copy). Hold steady for a second.

The app decodes the QR, which contains:

- The **API URL** (e.g. `https://api.customer.sm-tm.app`).
- (Optional) A **company context** if your organisation runs multiple companies on one installation.

### 4. Confirm the configuration

The app shows a summary: the server name and — if the QR included one — the company. Tap **Continue**.

### 5. Sign in

You land on the login screen. Enter your email (or username) and password, tap **Sign in**.

If your Admin included a pre-filled username in the QR code, the field is already filled — just enter your password.

### 6. Wait for the initial sync

After sign-in, the app downloads your slice of the hierarchy, your assigned tasks, master data, and the translation bundle for your language. The progress bar shows how far along you are. This typically takes 30–90 seconds on a good connection.

### 7. Set up biometric unlock

Once the initial sync finishes, you're prompted to set up biometric unlock. See [Biometric unlock](#) — it's strongly recommended.

You're paired. The Dashboard opens.

## Pair manually (no QR code)

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### 1. Open the app → Setup screen

Tap **Enter URL manually**.

### 2. Enter the API URL

Type the URL exactly as your Admin gave it to you. Include the scheme (`https://`).

The app validates the URL by pinging the server's health endpoint. If the URL is unreachable, you see an error — double-check typos and try again.

### 3. Continue through sign-in and initial sync

Same as steps 5–7 above.

## Re-pairing after a factory reset

---

If you've reset the app and need to pair again:

1. The app returns to the **Setup** screen automatically.
2. Scan the QR code (or enter the URL) as before.
3. Sign in.

All your drafts and cached data are cleared by a factory reset. Make sure you've submitted everything before you reset.

## Changing which installation you're connected to

---

Switching installations is rare — it usually only happens when:

- A customer moves from staging to production (they've been beta-testing a new deployment).
- A field technician is temporarily loaned to a different site.

The only way to switch is to **factory-reset the app** and pair again:

1. **Settings → Factory reset → Confirm.**
2. Re-pair with the new QR or URL.

#### **FACTORY RESET DESTROYS UNSYNCD WORK**

Any drafts that haven't uploaded are lost. Check **Pending uploads = 0** before resetting.

## What the app stores after pairing

Item	Where	Cleared by
API URL	Encrypted keychain	Factory reset
Company context	Encrypted keychain	Factory reset
Access token	Encrypted keychain	Sign-out or factory reset
Cached data (hierarchy, tasks, translations, master data)	Encrypted on-device storage	Sign-out or factory reset
Photos queued for upload	Encrypted local storage	Sign-out or factory reset

## Troubleshooting

Problem	Likely cause	Fix
<b>QR code won't scan</b>	Camera can't focus, or the code is too small on the screen	Move closer, zoom in on the web portal, or ask for a larger printed copy
<b>"Couldn't reach the server"</b>	URL typo, or the server is down	Double-check the URL; open it in a browser to confirm it responds
<b>"Invalid configuration"</b>	The QR code is malformed or from a different platform	Get a fresh QR from your Admin's <b>Mobile Setup</b> page
<b>Stuck on initial sync</b>	Slow network, or a very large hierarchy	Stay on Wi-Fi; be patient (can take 2+ minutes for large sites); close and reopen if it's been 5+ minutes
<b>Login fails after pairing</b>	Wrong credentials, or your account belongs to a different installation	Confirm with your Admin that your account is on this installation

See [I can't log in](#) for more.

## Related topics

- [Installing the app](#)
- [Biometric unlock](#)
- [Settings](#)
- [Your first login](#)

# Biometric unlock

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Protect the mobile app with Face ID, fingerprint, or a 4-digit PIN, so that an unlocked device doesn't automatically mean an unlocked app.

## REQUIRED ROLE

Any mobile-enabled role.

## Overview

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The mobile app adds its own authentication layer on top of the OS unlock. Even if you hand your unlocked phone to a colleague (or lose it briefly), the app stays locked until you provide your biometric or 4-digit PIN.

Two mechanisms:

- **Biometric** — Face ID / Touch ID / fingerprint / face unlock, depending on what your device supports at the OS level.
- **4-digit PIN** — always available as a fallback. Set during first-time setup or later in **Settings** → **Security**.

Biometric is faster and stronger; PIN is the universal fallback for when biometric fails (wet hands, dark room, mask on) or isn't available on the device.

## Prerequisites

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- The app is installed and paired. See [Pairing and setup](#).
- For biometric: your device's OS has a fingerprint / face-recognition / Touch ID / Face ID enrolled.

## Set up biometric unlock

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### At first-time setup

After the initial sync at the end of [Pairing and setup](#), you're prompted:

1. **"Set a 4-digit PIN"** — enter, confirm.
2. **"Enable Face ID / fingerprint?"** — tap **Enable** to allow biometric in addition to PIN.

3. The first biometric authentication happens immediately to verify.

Done.

## Later

Menu → **Settings** → **Security**:

- Toggle **Biometric unlock** on or off.
- Change your PIN.
- Change the lock timeout (how long the app stays unlocked when backgrounded — default 5 minutes).

## Unlock the app

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- When you open the app (cold start), you see the lock screen.
- The OS prompts for biometric (if enabled).
- On success, the Dashboard loads.
- On failure or unavailability, tap **Use PIN** and enter your 4-digit code.

## Lock timeout

---

The app stays unlocked for a short period while backgrounded, so you don't have to re-authenticate every time you switch apps briefly. Default: **5 minutes**.

Configurable in **Settings** → **Security** → **Lock timeout**:

- **Immediately** — any background = re-lock.
- **1 minute**.
- **5 minutes** (default).
- **15 minutes**.
- **Never** (strongly discouraged).

## What's protected by the lock

---

Once locked:

- The app contents are inaccessible — no task list, no hierarchy, no reports.
- Cached data on the device is encrypted at rest; the lock also requires authentication before decryption.

- Incoming push notifications still appear (configurable in OS settings) but tapping one lands you on the lock screen.

What the lock **doesn't** protect:

- If a malicious actor has full device access (root / jailbreak), the lock is just one defence, not all of them. Certificate pinning, session tokens, and encrypted storage are the other layers.

## Rate limiting

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Failed PIN attempts are rate-limited:

- **3 failed attempts** → 30-second cooldown.
- **6 failed attempts** → 5-minute cooldown.
- **9 failed attempts** → app signs out and requires password login to re-pair.

Biometric failures don't count against the PIN limit — biometric has its own OS-level rate limiting.

## Reset your PIN

---

### You remember the current PIN

**Settings** → **Security** → **Change PIN** → enter current → enter new.

### You don't remember

1. Tap **Forgot PIN** on the lock screen.
2. The app signs you out.
3. Sign in again with your password.
4. You'll be prompted to set a new PIN.

This doesn't destroy drafts or queued uploads — the cache survives.

### Locked out entirely

If biometric fails and you've forgotten the PIN and failed 9 times:

- Same flow as "Forgot PIN" — sign in again with your password.

## Disable the lock entirely

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**Settings** → **Security** → toggle **Require unlock** off.

### NOT RECOMMENDED

The app holds maintenance data that a malicious actor could tamper with (or worse, submit fake records under your identity). Unless you have a compelling reason, keep the lock on.

## Multi-user devices

Only **one user per device**. The app doesn't support multiple user profiles on the same install. If you share a device with a colleague on a different shift:

- One of you signs out at end of shift.
- The other signs in at start of shift.
- Drafts and queued uploads must clear before sign-out or the switching user loses them.

Better: give each user their own device. Device cost is low compared to the cost of data mix-ups.

## Biometric limitations

- **Face ID** (iPhone): works in the dark. Doesn't work through masks covering the eyes. Fails with significant facial changes.
- **Touch ID** (iPhone): wet / dirty fingers, cuts, cold hands all reduce reliability.
- **Android fingerprint**: as Touch ID. Enrolment quality matters — re-enrol your fingerprint if it keeps failing.
- **Android face unlock**: less secure than Face ID on most devices; still works.

If biometric isn't working reliably in your environment (cold rooms, gloves, wet work), rely on PIN.

## Things to watch for

### DON'T SHARE YOUR PIN

A shared PIN means ambiguous audit trails. Each person has their own account and PIN.

### RE-ENROL FINGERPRINTS ANNUALLY

Android fingerprint quality drifts over a year. Re-enrol if failure rate climbs.

### OS LOCKS VS APP LOCK

The OS screen lock protects the device; the app lock protects the app specifically. Don't disable the app lock on the theory that the OS lock is enough — the OS lock fails the moment you hand the unlocked phone to someone.

## Troubleshooting

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Problem	Fix
Biometric prompt doesn't appear	Check <b>Settings</b> → <b>Security</b> → <b>Biometric unlock</b> is on; check OS-level enrolment
Biometric always fails	Re-enrol at the OS level; fall back to PIN
PIN entry rejected repeatedly when you're sure it's right	Keyboard layout; try tapping numbers slowly
Locked out after too many attempts	Tap <b>Forgot PIN</b> → sign in with password
App re-locks immediately	Lock timeout may be <b>Immediately</b> ; change in Settings

## Related topics

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- [Pairing and setup](#) — where biometric setup is introduced.
- [Settings](#) — where the Security submenu lives.
- [I can't log in](#) — for full sign-in issues.

# Execute a task

The complete field workflow: open a task, follow the safety prompts, fill in the dynamic form, capture measurements and photos, save progress while offline, and submit when you're done.

## REQUIRED ROLE

Technician (primary). Mapper and Admin can also execute tasks.

## Overview

Every maintenance task in Smart Maintenance Task Manager follows the same execution lifecycle:

```
Open → Acknowledge safety → Fill form → Attach photos → Submit →
(Pending) Approve
```

The exact form you see depends on the **task type**:

Task type	Typical fields
Electrical	Voltage, current, insulation reading, thermal photo
Lubrication	Product used, quantity, point condition, photo of point
Mechanical	Checklist items, measurements, free-text notes, photo
Production	Output reading, run hours, anomaly flag
Repair request	Failure confirmation, parts used, time spent, before/after photo

See [Task types](#) for the full field breakdown per type.

The app is **offline-first**. You can execute every step below without a network connection — the data saves to the device and uploads automatically when you're back online.

## Prerequisites

- You're signed in to the mobile app. See [Pairing and setup](#).
- At least one task is assigned to you.

- You're physically at (or near) the asset the task relates to.
- You have whatever PPE and tools the safety procedure requires.

## Steps

---

### 1. Open the task

You have three ways in:

#### From the task list

1. Tap **Tasks** in the bottom navigation.
2. The list shows everything assigned to you, grouped by due time.
3. Tap the task you want to execute.

#### Scan an NFC tag

1. Tap the scan icon in the top right.
2. Hold the phone against the NFC tag on the equipment.
3. The app opens the task point. If more than one task is queued for that point, a selector appears — tap the one you want.

See [Scanning NFC tags](#) for more.

#### Scan a barcode

1. Tap the scan icon → switch to the barcode tab.
2. Point the camera at the barcode.
3. Same behaviour as NFC: the matching task point opens.

See [Scanning barcodes](#).

### 2. Read the task summary

The summary screen shows:

- The asset name and its position in the hierarchy (breadcrumb: Site → Line → Section → Asset → Task point).
- The task type and name.
- Due date, priority, and assigned technician.
- Any notes left by the Supervisor or Mapper.

- Safety procedures required (with step count).

#### 📸 SCREENSHOT NEEDED

**Capture:** The mobile-app task **Summary** screen (before the technician taps **Start**).

**Show:**

- Hierarchy breadcrumb at the top (Site → Line → Section → Asset → Task Point).
- Task type and task name.
- Due date, priority badge, assigned technician name.
- Safety-procedure banner showing step count (e.g. "3 safety steps to acknowledge").
- Notes field (optional — can be blank).
- **Start** button at the bottom.

**Device:** Both iOS and Android if possible, presented side-by-side with a tabbed content block. Otherwise iOS portrait is the default. English UI. Staging tenant — no real customer data.

**File:** docs/assets/images/placeholders/task-summary.svg → replace with PNG of the same name and drop this admonition.

## task-summary

Screenshot placeholder

When you're ready, tap **Start**.

### 3. Acknowledge safety steps (when required)

If the task has a safety procedure attached, the app steps you through each measure:

1. Read the instruction.
2. Tap **Acknowledge**.
3. Repeat for every step — you can't proceed until each one is acknowledged.

**⚠️ DON'T TAP-THROUGH WITHOUT READING**

Your acknowledgements are timestamped and stored with the task record. If a Supervisor later reviews a task where the measures were acknowledged in two seconds total, they can see that — and follow up.

## 4. Fill in the form

The form is generated dynamically from the task configuration. Field types you might see:

- **Numeric input.** Enter a measurement (temperature, pressure, hours). Units are shown next to the field.
- **Dropdown.** Pick from a list (condition: good / fair / poor).
- **Yes / No toggle.** Quick binary check.
- **Multi-select.** Tick all that apply.
- **Free text.** Notes, observations.
- **Photo capture.** Tap the camera icon — see step 5.
- **Product / quantity pair.** For lubrication: pick the product from the master list, enter the quantity.
- **Threshold-bound numeric.** Same as numeric input, but the app highlights the value if it's outside the configured threshold (red background + warning icon).

The **Save draft** button at the top right saves your progress at any time. The task moves to Drafts and you can close the app without losing work.

**📷 SCREENSHOT NEEDED**

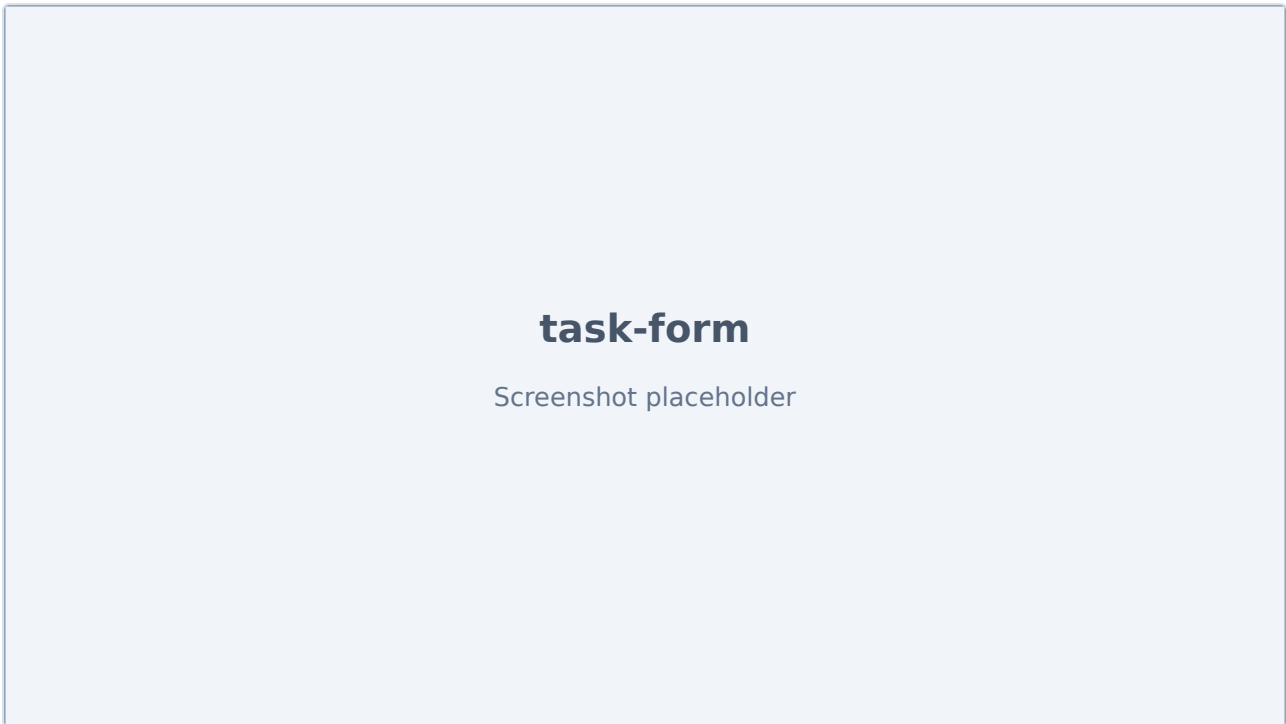
**Capture:** The dynamic task-execution **form**, mid-fill.

**Show:**

- Task name header.
- At least one **numeric field** with a unit label (e.g. "Temperature °C").
- At least one **dropdown** showing an expanded option list (e.g. condition: good / fair / poor).
- A **photo field** with one captured thumbnail and the camera icon.
- A **threshold-highlighted** value — one numeric field with a red background and warning icon (value out of range).
- **Save draft** button in the top right.
- **Submit** (disabled or enabled) at the bottom.

**Device:** Lubrication or Maintenance task on iOS, portrait, English UI, staging tenant.

**File:** docs/assets/images/placeholders/task-form.svg → replace with PNG of the same name and drop this admonition.



## 5. Capture photos

Photos are essential for proof-of-work, evidence in repair requests, and condition documentation.

### Using the camera

1. Tap the camera icon on any photo field.
2. The in-app camera opens.
3. Frame and tap the shutter.
4. Optionally annotate with arrows or text (tap the pen icon).
5. Tap the tick to attach.

### Picking from the gallery

1. Tap the camera icon.
2. Tap **Gallery**.
3. Pick one or more photos.

### Limits:

- Up to 10 photos per task.
- Up to 10 MB per photo.
- JPEG and PNG supported.

- The app compresses photos on-device before upload — you can take high-resolution shots without worrying about data usage.

See [Photos and attachments](#) for more.

## 6. Save, or keep going

At any point you can:

- Tap **Save draft** — the task is preserved locally. Close the app if you like. Come back later.
- Tap **Continue** — keep filling in fields.
- Tap **Submit** (only available when all required fields are filled).

Drafts appear on the Dashboard under **Pending uploads** if you're offline, or in **Tasks → Drafts** regardless.


## 7. Submit

When the form is complete:

1. Tap **Submit** at the bottom.
2. Review the confirmation — fields, photos, and acknowledgements are listed.
3. Tap **Confirm**.

What happens next depends on connectivity:

### Online

- The task submits immediately.
- The task moves to status **Pending approval** on the Supervisor's dashboard.
- You get a  toast: **Task submitted**.
- The task disappears from your active list.

### Offline

- The task saves to the outbox.
- The Dashboard badge **Pending uploads** increments.
- As soon as connectivity returns, the task uploads in the background.
- If the app is open and you have signal, upload is immediate (within a few seconds).
- You get a push notification when approval happens later.

## 8. Review the result

- The task's status changes to **Pending** (awaiting Supervisor approval).
- If the Supervisor **approves**, you get a push notification and the task moves to **Completed**.
- If the Supervisor **rejects**, you get a push notification with the reason; the task reopens in your list for rework.

## Working offline

---

The entire flow above works without a network connection.

- Task data is cached on the device.
- Photos are queued for upload.
- Safety acknowledgements are timestamped locally.
- Form drafts save locally.
- On reconnect, everything syncs in the background.

See [Working offline](#) for details on what caches, when, and how conflicts resolve.

## Handling conflicts

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If a Supervisor changes a task you've started (reassigns it, deletes it, changes the form), you'll see a warning on next sync:

This task was modified on the server. Your draft can't be submitted. Please review the new version.

Tap **Review** to see the differences. In most cases, you start the new version fresh. If your draft was significant, export it as a note first (three-dot menu → **Export draft as text**).

Conflicts are rare in practice because Supervisors don't edit tasks that are in progress.

## iOS vs Android differences

---

The app behaves identically on both platforms, with a few platform-native conventions:

Behaviour	iOS	Android
Back navigation	Tap the ← arrow or swipe from the left edge	Tap the ← arrow or use the system back button
Biometric	Face ID or Touch ID	Fingerprint (most devices) or face unlock
Camera	iOS native camera chrome	Android native camera chrome
Permissions	Per-permission prompts at first use	Same
Background sync	Every ~15 min (throttled by OS)	Every 15 min

## Troubleshooting

Problem	See
Photo upload keeps failing	<a href="#">Photo upload is failing</a>
Task won't submit (button greyed out)	Check that every required field is filled and every safety step is acknowledged
Task disappeared before I could submit	<a href="#">Tasks aren't showing</a>
Pending upload count won't clear	<a href="#">Sync is stuck or failing</a>
App froze during submit	<a href="#">The app is crashing</a>

## Related topics

- [Task drafts](#) — saving and resuming in-progress tasks.
- [Photos and attachments](#) — photo limits, compression, thumbnails.
- [Working offline](#) — what caches and when.
- [Sync and connectivity](#) — how background upload works.
- [Repair requests](#) — escalating a problem you find during a task.
- [Reporting a shutdown](#) — escalating a safety or production halt.
- [Task types](#) — full field reference per task type.

# Task drafts

---

Save work-in-progress tasks as drafts, resume them later, and understand how drafts sync to the server.

## REQUIRED ROLE

Technician, Mapper, Admin, PegotecUser (any mobile-enabled role that can execute tasks).

## Overview

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A **draft** is an in-progress task that you've started but haven't submitted yet. It lives locally on the device until you either:

- **Submit** it — moves to the server for approval.
- **Discard** it — deletes the local record.
- **Hand it off** — in the rare case that a teammate needs to pick up where you left off (not supported natively; see below).

Drafts exist because real maintenance work is interrupted: radio call, shift handover, lunch break, another task that just became urgent. Drafts let you save progress without losing a partial form and come back to it.

Drafts save automatically on every field change — you don't have to remember to tap **Save**. But there's an explicit **Save draft** button too, mostly as a visual confirmation.

## When the app creates a draft

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You create a draft implicitly as soon as you:

1. Tap **Start** on a task.
2. Acknowledge any safety procedures.
3. Enter data in any field.

From that moment on, the task state is preserved locally. Leaving the app — closing it, restarting the device, swapping to another app — doesn't lose data.

## Find your drafts

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Menu → **Tasks** → **Drafts** shows every task you have in progress. Each row shows:

- Task name and asset.
- When you started (relative — "2 hours ago").
- Fields filled vs fields remaining.
- A draft badge icon.

Tap any row to resume from where you left off.

## Resume a draft

---

Tap the row. The task form reopens with everything you'd entered intact:

- Form fields — values preserved.
- Photos — thumbnails attached.
- Safety acknowledgements — already-acknowledged steps remain acknowledged.
- Notes — preserved.

You can continue filling in fields, attach more photos, or tap **Submit** when done.

### DON'T RE-ACKNOWLEDGE SAFETY

If you resume a draft that has safety acknowledgements already on it, don't re-tap them. The timestamps on the original acknowledgements are what get stored with the submission. Tapping again only updates the display and does no harm, but it's wasted effort.

## Discard a draft

---

1. Open the draft from **Tasks** → **Drafts**.
2. Three-dot menu → **Discard**.
3. Confirm.

Discarded drafts are gone from the device. The server-side task instance remains unsubmitted — it's still assigned to you as if you'd never started.

### DISCARD IS PERMANENT

You can't un-discard. Any partial data — measurements, photos, notes — is lost. Discard only when you're sure.

## Submit a draft

---

Normal submit flow. See [Executing a task → Submit](#).

- Online: the submission uploads immediately.
- Offline: queues in the outbox; shows in the **Pending uploads** count until it uploads.

The draft is removed from **Tasks → Drafts** as soon as it's submitted (whether the upload has completed or not).

## Auto-save cadence

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The app saves to local storage on **every meaningful state change**:

- Every keystroke in a text field (debounced).
- Every dropdown / toggle change (immediate).
- Every photo attachment (immediate).
- Every safety acknowledgement (immediate).

So you can't lose more than the last few keystrokes, even if the device crashes mid-typing.

## How long does a draft live?

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Indefinitely, on the device.

However:

- A draft for a task that has been **reassigned** to someone else becomes orphaned. The app warns you on next sync and offers to discard it.
- A draft for a task that has been **deleted** server-side becomes orphaned. Same warning.
- A draft older than ~30 days prompts you with a "still relevant?" banner. You can dismiss the banner and keep the draft, but it's a nudge to either submit or discard.

Drafts don't expire on their own.

## Draft-aware actions

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Some actions treat drafts specially:

## Factory reset

**Settings** → **Factory reset** destroys all drafts along with everything else. The app prompts you if **Pending uploads** or **Drafts** is non-zero.

## Sign out

Signing out doesn't destroy drafts — they persist and are available when you sign back in. (If a different user signs in on the same device, they won't see your drafts; drafts are scoped per-user on the device.)

## Uninstall

Deleting the app deletes all drafts. Check **Tasks** → **Drafts** is empty before uninstalling.

## Handing off a draft to a teammate

---

Not natively supported. A draft is tied to the user on the device.

If you genuinely need to hand off:

1. **Discard** the draft on your device.
2. Ask your Supervisor to reassign the task to the other technician.
3. They start fresh.

In practice, this rarely matters — drafts are usually short-lived.

## Drafts and offline mode

---

Drafts work identically online and offline. The only visible difference:

- **Online:** the form is saved locally; no server-side state exists for the draft.
- **Offline:** same.

Drafts don't attempt to upload until you submit. If the app is offline when you submit, the submission queues in the outbox (separate from drafts). See [Working offline](#).

## Things to watch for

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### **SUBMIT PROMPTLY WHEN YOU COME BACK**

A draft you abandoned two weeks ago may be referencing measurements that are no longer current. Check against current conditions before submitting old drafts.

### **DRAFTS DON'T SHOW TO YOUR SUPERVISOR**

Your draft is invisible to everyone else until you submit. If a Supervisor asks "where's task X?" and it's still a draft, they have no way to see it. Submit or tell them.

### **MULTIPLE DRAFTS FOR THE SAME TASK**

You can't have two drafts for the same task instance — the app resumes the existing one when you tap **Start** again. If you genuinely need to retry from scratch, discard the draft first.

## **Common patterns**

---

### **Start, then get pulled away**

You start a lubrication task, acknowledge safety, enter two fields, and a repair request calls you away:

1. Close the task (or the app).
2. Handle the repair.
3. Later, **Tasks** → **Drafts** → resume.
4. Finish the lubrication form and submit.

### **End of shift with open drafts**

1. Check **Tasks** → **Drafts**.
2. Finish anything that's ~90% done.
3. For anything substantial, leave a note in the task's notes field so the next shift can pick up context.
4. Discard any drafts that are no longer relevant.

### **Shift handover**

1. Brief your incoming colleague on what you have in drafts.
2. The draft stays on your device — see "Handing off a draft" above.

## Troubleshooting

---

Problem	Fix
Draft disappeared	Check <b>Tasks</b> → <b>Drafts</b> filter; confirm you're signed in as the same user
Can't resume — "task was modified on the server"	The task changed while you were offline; discard and start fresh, or <a href="#">file a conflict</a>
Submit fails from a draft	Check required fields; see <a href="#">Sync is stuck or failing</a>
Photos attached to a draft aren't showing	Force sync; photos may still be queued

## Related topics

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- [Executing a task](#) — the full workflow that drafts are part of.
- [Working offline](#) — how drafts interact with offline mode.
- [Sync and connectivity](#) — how submissions leave the device.
- [Photos and attachments](#) — drafts carry their photos.

# Scan an NFC tag

---

Use NFC to jump straight from a physical piece of equipment to the task point that lives on it.

## REQUIRED ROLE

Technician, Mapper, Supervisor, Admin, PegotecUser — any role with `mobile.nfc.scan`.

## Overview

---

Every task point in your plant can have a physical **NFC tag** attached to it. Scanning the tag with your phone opens the matching task point in the app — no menu browsing, no hierarchy tree navigation.

It's the fastest way to get to a task. Walk up to the asset, hold the phone to the tag, work begins.

NFC tags are written by **Mappers** during commissioning. If a task point doesn't have a tag yet, tell your Mapper. See [Writing NFC tags](#).

## Prerequisites

---

- Your device has NFC hardware (check **Settings** on your phone if you're unsure).
- NFC is **enabled** at the OS level.
- The task point has a written tag on it.

## Enable NFC on your phone

---

### Android

**Settings** → **Connected devices** → **NFC** — toggle on.

Some manufacturers bury NFC under **Connections**, **Wireless**, or **More connections** — search settings for "NFC" if you can't find it.

### iOS

NFC is permanently on in the hardware; the app prompts for permission the first time it wants to scan. Grant **Camera** and **NFC** when asked.

## Scan a tag

---

### 1. Open the app

The app doesn't need to be on any particular screen, though the **Dashboard** or **Tasks** list are easiest.

### 2. Tap the scan icon

Top-right of the main screens. Usually a small NFC / wave icon.

### 3. Hold the phone against the tag

- Back of the phone against the tag, not the front.
- Stay still for ~1 second. Don't wave or swipe.
- The phone's NFC antenna is in a specific spot — see **Phone antenna position** below.

### 4. Result depends on what the tag links to

Tag links to a task point

>

The app opens the **task point** detail screen. If there's one task queued on it, that opens too. If there are multiple, a selector appears — tap the one you want.

Tag links to an asset (no task points yet)

The app opens the asset's detail screen. From there you can browse to task points underneath.

Tag is blank or unregistered

The app shows an error: **Unknown tag**. Report the tag to your Mapper — it probably needs writing or is broken.

Tag doesn't exist in your company

**Tag not found.** Either a tag from a different tenant got on this equipment by mistake, or the asset it references has been deleted.

## Phone antenna position

---

NFC antennas are in different places on different phones:

Phone family	Antenna location
Most Android phones	Upper back, near the camera
Samsung (recent)	Middle of the back
iPhone	Top edge, near the notch / Dynamic Island
iPad	Top edge (iPads with NFC are rare)

If you're unsure, sweep the phone slowly across the tag, back-to-tag, until it catches.

## Multiple tags in close proximity

If two or more tags are within a few centimetres of each other (which should be rare if your Mapper is careful with placement), the phone might read the wrong one. Move the phone closer to the one you want until only one is read.

## Scan history

Some installations log every scan you make. Menu → **Scan history** shows:

- Timestamp.
- Tag / task point opened.
- Whether the scan was followed by a completed task.

This feeds the **NFC skip report** that Supervisors see — if a technician repeatedly scans but doesn't complete the following task, it's a coaching signal.

## When to use NFC vs the tree

- **NFC** — you're physically at the asset. One second to open the task.
- **Tree** — you're not at the asset, or the tag is damaged / missing. Navigate via the hierarchy browser.
- **Barcode** — older sites without NFC infrastructure. See [Scanning barcodes](#).

## Offline scanning

NFC scanning works **fully offline**. The tag data on the physical tag is the identifier; the app resolves it to the matching task point in the local cache. You don't need network.

## Common issues

---

### Phone doesn't detect the tag

- Check NFC is enabled (Android) or the app has NFC permission (iOS).
- Try removing the phone case — some thick cases block NFC.
- Try the phone at different angles. The antenna may not be where you think.
- The tag may be damaged. Report to the Mapper.

### Tag reads, but wrong task point opens

- Another tag may have taken the same identifier during writing. Report to your Mapper; the tag needs re-writing.

### "Unknown tag" on a tag that should work

- The tag is blank. A Mapper needs to write it.
- Or the task point it pointed to has been deleted. Check with your Mapper.

See [NFC is not working](#) for more.

## Things to watch for

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### NFC IS THE FASTEST WAY

If your site has tags, scanning them should become muscle memory. You save several seconds per task, which adds up over a shift.

### DON'T FORCE IT

If a tag won't scan after two attempts, don't keep trying. Either the tag is damaged, your device's NFC is off, or the phone is positioned wrong. Troubleshoot rather than keep tapping.

### NFC ON METAL NEEDS SPECIAL TAGS

Metal surfaces interfere with NFC. If a specific area of the plant has scanning issues, the tags may not be "NFC on-metal" variants. That's a Mapper-level fix.

## Troubleshooting

---

Problem	See
NFC detect fails entirely	<a href="#">NFC is not working</a>
Wrong task point opens	Tag misconfigured; report to Mapper
Scan count skyrockets (skip report)	Train in proper phone antenna positioning; or tags need repositioning
Tag is physically damaged	Mapper writes a replacement — <a href="#">Writing NFC tags</a>

## Related topics

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- [Writing NFC tags](#) — the mapper's side.
- [NFC tags \(web portal\)](#) — Admin / Mapper view of tag lifecycle.
- [Scanning barcodes](#) — the backup / alternative.
- [Executing a task](#) — what you typically do after scanning.
- [NFC is not working](#) — troubleshooting.

# Write an NFC tag

---

Encode a task point's identifier onto a blank NFC tag and place the tag on the physical asset.

## REQUIRED ROLE

Mapper.

## Overview

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NFC tags are physical, stick-on (or bolt-on) labels with a small chip inside. A mapper writes the task point's ID onto the tag, then physically attaches the tag to the equipment. Thereafter, any technician holding a phone near the tag can jump straight to the task — see [Scanning NFC tags](#).

Writing is a mobile-app-only feature. The web portal has no way to write a physical tag.

The app writes tags in the format:



```
NFC_<TYPE>_<id>
```

For example, `NFC_TASKPOINT_4827`. The encoding is a single NDEF text record — standard, readable by any NFC-capable device.

## Prerequisites

---

- You have the **Mapper** role.
- The task point already exists in the hierarchy. (You can create the task point and write its tag in one session — see [Creating hierarchy](#).)
- You have **blank, writable NFC tags** on hand.
- Your device has NFC hardware and NFC is enabled.

## Choosing tags

---

Not all NFC tags are equal. For industrial environments:

Tag attribute	Recommendation
Chip type	NTAG213 (minimum) or NTAG215 (more storage, longer URL support if needed later).
Enclosure	Durable, enclosed tags — plastic encapsulated or in an epoxy dome. Plain paper stickers don't survive grease, steam, wash-down, or temperature cycling.
On-metal compatibility	If the tag mounts on a ferrous surface, buy " <b>NFC on-metal</b> " variants. Plain tags detune severely on metal and may not scan reliably.
Temperature rating	Match to the environment. Hot / cold rooms need rated tags.
Size	Larger tags give more reliable reads but need more real estate. 30 mm diameter is a common industrial default.

A good starting kit: a pack of 100 NTAG213 on-metal tags, plastic enclosed, ~30 mm diameter. Cheap per-tag; replacements are easy.

## Steps

### 1. Open the task point

Three ways in:

[From the hierarchy browser](#)

Menu → **Hierarchy** → drill to the task point → open.

[From a just-created task point](#)

Right after you create a task point, the detail screen offers **Write NFC tag** as a next-step action.

[From a task you're looking at](#)

Some installations surface **Write tag** from a task's context menu.

### 2. Tap "Write NFC tag"

A prompt appears: "Hold the NFC tag against the back of your device."

### 3. Hold the tag against the antenna

Same antenna position rules as scanning:

- Most Android phones: upper back.
- iPhones: top edge near the notch.

Hold still for 1–2 seconds. The phone writes, verifies, and the app confirms: **Tag written.**

## 4. Physically apply the tag

Do this before you leave the asset:

- Clean the surface (a wipe is usually enough).
- Peel the backing off if the tag is adhesive-backed; use a bracket / bolt-on for industrial-mount tags.
- Place in a visible, reachable spot — where a technician with a phone can comfortably press up against it.
- Avoid placing over labels, moving parts, or areas that see heavy wash-down if your tags aren't rated for it.

## 5. Test-scan

Walk away, come back, scan the tag with the same phone (or a different one). The task point should open. See [Scanning NFC tags](#).

If the scan fails, re-check the placement and antenna positioning, then retry.

## 6. Lock the tag (optional but recommended)

Most NTAG chips support a **permanent write lock** — once locked, the tag content can't be overwritten. This protects against accidental or malicious rewriting.

After you're sure the tag works:

1. Re-tap **Write NFC tag** on the task point.
2. Choose **Lock tag after write** (if available on your installation).

### **LOCKING IS PERMANENT**

A locked tag can't be re-programmed. If the task point's ID changes for some reason (unlikely, but possible), the tag becomes useless and has to be replaced. For most installations the tradeoff favours locking; for volatile installations it may not.

## Writing on metal

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Even with on-metal tags, placement matters:

- Keep ~2 mm of plastic / paint between tag and bare metal if possible.
- Avoid placing directly over welds (they distort the RF field).
- Test-scan more carefully — on-metal tags can be finicky with some phone models.

If you're consistently having trouble on a particular asset class, switch to larger on-metal tags or use a plastic spacer between tag and metal.

## Replacing a damaged tag

---

If a tag gets damaged (hit, washed off, painted over):

1. Remove the old tag.
2. Take a new blank tag.
3. Open the same task point.
4. **Write NFC tag** — writes the same ID onto the new tag.
5. Apply the new tag.

The task point's scan history carries forward; the physical tag is the only thing that changes.

## Batch writing

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If you have a hundred task points to tag in one session:

- Pre-stage tags in labelled bags (one per task point) so you don't mix them up.
- Use the **Next task point** button (if present) to step through task points on the same asset without going back to the hierarchy every time.
- Two-person workflow: one person with the phone, the other applying tags. About 20 seconds per tag in a rhythm.

## Things to watch for

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### DON'T WRITE THE SAME TAG TWICE

Every NFC tag should map to exactly one task point. If you accidentally write the same physical tag with two different IDs, the last write wins — and you've stranded a task point without a tag until you notice.

### KEEP A FEW BLANK SPARES IN YOUR POCKET

Once you start tagging regularly, you'll find broken / damaged tags to replace. Having a handful of blanks on hand turns a "come back later" into "fix now".

### TAGS HAVE SCAN COUNTERS (SOMETIMES)

Some chips log a scan count. Mappers can review scan counts via the NFC tags page to spot heavily-used vs unused tags — useful data for plant optimisation.

## Troubleshooting

Problem	Fix
"Write failed"	Hold longer; reposition phone; try a fresh tag (the first one may be DOA)
Tag verifies but doesn't scan later	Placement issue — too close to metal, or antenna can't reach it in-situ
Can't find "Write NFC tag" in the app	Your role may not have <code>mobile.nfc.write</code> — check your role with your Admin
Tag reads the wrong task point	Rewrite it — open the intended task point first
Tag scans once, then stops working	Physical damage, moisture ingress, or a locking step went wrong — replace

## Related topics

- [Scanning NFC tags](#) — the technician's side.
- [NFC tags \(web portal\)](#) — tag lifecycle management for Admins.
- [Creating hierarchy](#) — create task points and tag them on the same visit.
- [Mapper handbook](#)
- [NFC is not working](#) — when scans stop working.

# Scan a barcode

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Use the device camera to scan a QR code or barcode label and jump to the matching task point.

## REQUIRED ROLE

Technician, Mapper, Supervisor, Admin — any role with `mobile.qr.scan`.

## Overview

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Barcode / QR-code scanning is the alternative to NFC for opening a task point. It's slower than NFC (you have to frame the camera) but more forgiving — barcodes don't need a phone held right against them, they work on any reasonable phone, and they survive in conditions that degrade NFC reads.

Use barcodes when:

- The site doesn't have NFC infrastructure installed.
- The asset location makes NFC awkward (phone can't physically reach the tag).
- The NFC tag on an asset is damaged and awaiting replacement.

The app decodes many barcode formats; the most common in practice is QR because it encodes more and decodes from further away.

## Prerequisites

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- Your device has a working camera.
- The app has camera permission (granted at first use or in OS settings).
- The asset has a printed QR / barcode label bound to a task point.

## Supported formats

Format	Typical use
<b>QR code</b>	Most common; highest data density; easy to print at any size.
<b>Code 128</b>	Linear barcode; fine for simple IDs.
<b>Code 39</b>	Older linear standard; still common on industrial labels.
<b>EAN-13</b>	Retail-style barcode; rarely seen in industrial plants.
<b>UPC-A</b>	Same.
<b>Data Matrix</b>	Compact 2D format; seen on etched asset labels.

If you have labels in a format not on this list, talk to your Mapper — they may need to switch label generators.

## Steps

### 1. Tap the scan icon

Top-right of main screens. Same icon as NFC — the app decides which to use based on what the camera / NFC antenna detects first.

If your device has NFC, the default is NFC. Tap a second time (or swipe) to switch to barcode mode explicitly.

### 2. Frame the code

The camera view opens with a viewfinder overlay. Aim the camera so the code is roughly centred. You don't need millimetre precision — the decoder is fast and tolerates angle.

Tips:

- Hold the phone 10–30 cm away. Closer isn't better; the camera can't focus.
- Steady the phone. Shaking drops frame rate; decoder wants clean frames.
- Good lighting helps. If the label is in shadow, turn on the device flashlight (icon in the viewfinder).

### 3. Wait for the decode

Typically under a second. The app vibrates and beeps (if sounds are on).

## 4. Result

Same as NFC: the matching task point opens. If multiple tasks are queued on it, pick one.

### Task point opens

Work begins. Continue with [Executing a task](#).

### Asset opens (no task points)

Drill into the asset to find the specific task point.

### Unknown code

The code doesn't match anything in your company's data. Possible reasons:

- The label was printed for a different tenant.
- The task point has been deleted.
- The code is from somewhere else (a shipping label, a vendor tag) that isn't meant for the platform.

Report to your Mapper.

## Flashlight / torch

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In a dark area:

1. Tap the flashlight icon in the viewfinder.
2. The torch turns on.
3. Scan as usual.
4. The torch stays on until you close the viewfinder or tap again.

Don't leave the torch on unnecessarily — it drains battery quickly.

## Multiple barcodes in view

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If two or more codes are in the camera's view (a label with multiple barcodes, or two adjacent labels), the decoder picks one (usually the largest / most-centred). Move closer to the one you want until only it is in the viewfinder.

## Scan vs tree navigation

- **Scan:** you're at the asset, have the label, want speed.
- **Tree (Hierarchy browser):** you're not at the asset, or the label is damaged / missing.

See [Browsing the hierarchy](#).

## Offline scanning

Barcode scanning works **fully offline**. The code data is decoded on-device; matching to a task point uses the local cache. No network needed.

## Differences from NFC

	NFC	Barcode
Speed	~1 second	~1-3 seconds
Proximity	Must touch / be within a few cm	10-30 cm from camera
Robustness	Tag-dependent; sensitive to metal, moisture	Surface-dependent; needs clean, unobstructed label
Flashlight needed?	No	Yes in dark
Works through a phone case	Sometimes	Always
Works if label damaged	N/A	No — physical labels degrade

Most sites use a mix: NFC as the primary, barcode as the fallback for locations that defeat NFC.

## Things to watch for

### USE THE FLASHLIGHT

In a dimly-lit plant, the flashlight halves the scan time. It's not cheating.

### DON'T SCAN AT EXTREME ANGLES

The decoder wants the label roughly perpendicular to the camera. 30° off-axis is fine, 70° off-axis starts failing.

### QR BEATS 1D BARCODES AT DISTANCE

If your plant supports both, QR is typically a better format — reads from further, tolerates more damage, encodes more data.

## Troubleshooting

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Problem	Fix
Scan won't start	Camera permission; check OS settings
Decoder can't see the code	Clean the lens; improve lighting; use the flashlight
"Unknown code"	Code doesn't match any task point; report to Mapper
Viewfinder freezes	Kill the app and reopen; low-end devices occasionally hang
Decodes the wrong code (two in view)	Move closer to the one you want

## Related topics

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- [Scanning NFC tags](#) — the faster alternative when available.
- [Executing a task](#) — what you do after opening the task point.
- [Browsing the hierarchy](#) — when scanning isn't an option.
- [File formats](#) — full barcode-format list.

# Photos and attachments

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Capture photos on your device and attach them to tasks, repair requests, and shutdown reports.

## REQUIRED ROLE

Technician, Mapper, Admin, PegotecUser (any mobile-enabled role).

## Overview

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Photos are essential evidence for maintenance work:

- **Proof-of-work** — before/after shots showing condition changes.
- **Evidence** for repair requests and shutdown reports.
- **Condition documentation** for audit and compliance.

The mobile app has a full photo capture pipeline: take the photo in-app (or pick from the gallery), compress on device, queue for upload, and let the server generate thumbnails for display in the web portal. All of it works offline — photos sit in the outbox until connectivity returns.

## Prerequisites

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- The app has **camera permission** (granted on first use or in OS settings).
- A task, repair request, or shutdown report is open that accepts photos.

## Limits

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- Up to **10 photos per task** (repair request, shutdown report).
- Up to **10 MB per photo** on the device side.
- **JPEG and PNG** supported.
- **HEIC** (iOS default) is converted automatically.
- No video support.

## Capture a photo

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From any photo field:

## Option A: Use the in-app camera

1. Tap the camera icon.
2. The in-app camera opens.
3. Frame and tap the shutter.
4. Optionally annotate — tap the pen icon for arrows, boxes, or text captions.
5. Tap the tick to attach.

The photo appears as a thumbnail in the photo field.

## Option B: Pick from the gallery

1. Tap the camera icon.
2. Tap **Gallery**.
3. Pick one or more photos.

### WHEN TO USE EACH

- **Camera** — proof-of-work taken right now, directly on the task.
- **Gallery** — photos you captured earlier (maybe before opening the task) or that a colleague shared with you.

## Two-pass upload on slow connections

On slow or unreliable connections, the app switches to a **dual-quality** upload strategy so your submission isn't blocked waiting for photos:

1. **First pass — preview quality.** Each photo is compressed aggressively (around 50% JPEG quality) and uploaded quickly. This makes the photo visible on the web portal within seconds so your Supervisor can triage.
2. **Second pass — full quality.** Once the preview uploads complete, the app queues a full-resolution version and sends it when bandwidth allows. The full-quality file replaces the preview transparently.

You don't trigger this manually — the app decides based on upload-speed measurements. On fast connections (Wi-Fi, good 4G), the app skips the first pass and uploads full quality directly.

Two things to know:

- **Supervisor-visible previews may look softer** for a few minutes after submission on slow sites. They sharpen when the full-quality pass lands.
- **Storage consumption** is slightly higher during the gap between passes — both copies exist briefly. On a low-storage device, the cache manager prunes the preview once the full version uploads.

## Annotate a photo

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The annotation tools are intentionally minimal — enough to point at things, not to build a pitch deck.

- **Arrow** — drag to show direction, flow, or the thing-in-question.
- **Box** — enclose a specific area of the image.
- **Text** — short captions (keep it under a sentence).
- **Undo** — step back.
- **Clear** — remove all annotations.

Annotations are **baked into the image** — they can't be edited after you attach.

## Remove a photo

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Before submit:

1. Tap the photo thumbnail.
2. Tap the trash icon.
3. Confirm.

After submit, photos can't be removed from the mobile app. Ask your Supervisor or Admin to handle this on the web portal side.

## How upload works

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Photos upload **separately** from the task form:

1. You submit the task form.
2. The form uploads (smaller, faster).
3. Photos enter the outbox, one at a time.
4. Each photo:
  - Compresses on-device (reduces size without meaningful quality loss).
  - Uploads over HTTPS.
  - Is processed by the server: thumbnails generated in three sizes (small, medium, full).

If a photo fails to upload, it stays in the outbox and retries on the next sync cycle (every ~15 min or pull-to-refresh).

See [Sync and connectivity](#) for the full flow.

## Offline capture

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Everything works offline:

- Take the photo.
- Annotate.
- Attach.
- Submit the task.

The Dashboard's **Pending uploads** badge counts queued photos. When connectivity returns, they trickle up in the background.

## What happens on the server

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Once uploaded, the server:

1. Stores the full-resolution photo.
2. Generates three thumbnail sizes (roughly 200px, 600px, 1200px wide).
3. Indexes the photo against the task for later retrieval.

Supervisors viewing a task on the web portal see the thumbnails; clicking opens the full-resolution image. Photos are available in the [Task Reporting](#) and [Task History](#) reports.

## Image quality and storage

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The on-device compression aims for:

- Visibly good quality at the sizes used in the portal (up to full HD preview).
- Small file size (~500 KB–2 MB per photo after compression).
- Preserved EXIF timestamp (so photos are dated even if taken offline).

If your phone's default camera is set to very high resolution (24 MP+), compression still produces the same target output size. You don't need to dial down the camera manually.

## Photo fields vs photo attachments

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Some task forms include **named photo fields** (e.g. "Before photo", "After photo"). These work the same way as generic photos, but they're labelled so the reviewer knows which is which. If the task has both, take the before photo first, execute the work, then take the after photo.

## Things to watch for

### TAKE THE PHOTO BEFORE MOVING ON

Don't finish a task and think "I'll snap the photo on the way out". Take it while you're still at the asset. The mobile app makes it a three-second operation.

### PHOTOS COUNT AGAINST STORAGE

Queued-but-not-uploaded photos sit in local storage. If the device is nearly full, photo capture starts to fail. Keep **Pending uploads** clearing regularly.

### LANDSCAPE VS PORTRAIT

Either works. The web portal displays them in the orientation they were captured.

## Troubleshooting

Problem	See
Photo upload keeps failing	<a href="#">Photo upload is failing</a>
Camera permission denied	OS settings → app permissions → Camera → allow
Photo looks blurry	Retake with flash; or use the gallery picker for a better-lit shot
Too many photos attached	Delete some before submitting (limit is 10)
HEIC photo rejected	iOS Settings → Camera → Formats → Most Compatible

## Related topics

- [Executing a task](#) — where most photos get captured.
- [Repair requests](#) — photos are strongly recommended on repair requests.
- [Reporting a shutdown](#) — photos help triage.
- [Sync and connectivity](#) — how uploads drain.
- [File formats](#) — full format reference.

# Submit a repair request

Report a broken component, abnormal condition, or needed repair from the field.

## REQUIRED ROLE

Technician, Mapper, Admin, PegotecUser (any mobile-enabled role with `mobile.repair.request`).

## Overview

A repair request is how you flag a problem that needs work — something's broken, worn, leaking, or otherwise outside of its normal state — without blocking your current task. The request goes to your Supervisor's queue, where it's triaged, assigned, and ultimately resolved.

A repair request is **not** the same as a shutdown:

Use	Action
Equipment is broken but the line can still run	<b>Repair request</b>
Line stopped / production halted / safety engaged	<b>Shutdown report</b> — see <a href="#">Reporting a shutdown</a>

It's fine to raise both for the same incident if both apply.

## Prerequisites

- You're at the asset, or you just came from it.
- Ideally, you have a photo of the problem.

## Steps

### 1. Open the repair request form

Several ways in:

**From a task you're executing**

1. Inside the task, tap the three-dot menu.
2. Tap **Raise repair request**.
3. The form opens with the asset pre-filled.

**From an asset in the hierarchy**

1. Open the asset in the hierarchy browser.
2. Tap **Raise repair request**.

**From the main menu**

1. Menu → **Repair request**.
2. You'll need to pick the asset manually — tap **Select asset** and navigate the tree, or scan the NFC tag / barcode.

## 2. Fill in the form

Field	Required	Notes
<b>Asset</b>	Yes	Pre-filled if you came from a task. Tap <b>Change</b> to pick a different one.
<b>Failure type</b>	Yes	From the master list of repair-request types configured by your Admin.
<b>Description</b>	Yes	Free text. Describe what you see: "Oil leak from bearing housing, approx 1 drop per minute." Be specific — "it's broken" doesn't help the Supervisor triage.
<b>Priority</b>	Yes	Low / Medium / High / Critical. See below.
<b>Photos</b>	Recommended	At least one photo of the problem. See <a href="#">Photos and attachments</a> .
<b>Notes</b>	Optional	Anything the Supervisor should know that doesn't fit the description.

## 3. Pick the right priority

Use priority intentionally — it shapes how fast the request gets acted on.

Priority	When to use
<b>Low</b>	Cosmetic, non-urgent. Worn paint, loose label, anything that doesn't affect function.
<b>Medium</b>	Affects function but not safety or production. Slight leak, unusual noise, minor wear. Default for most requests.
<b>High</b>	Risks production or safety in the near term. Significant leak, vibration, heat, smell.
<b>Critical</b>	Immediate safety or production risk. Equipment actively failing, smoke, sparks, major leak, unsafe condition. Often accompanied by a shutdown report.

### **⚠️ DON'T USE CRITICAL FOR CONVENIENCE**

If everyone marks their requests Critical, the Supervisor can't tell what actually is. Reserve it for real emergencies.

## 4. Add photos

At least one photo is strongly recommended. It shortens the Supervisor's triage by a lot — they can see what you're describing instead of interpreting your text.

- Point the camera at the actual problem.
- Include some context — a wider shot showing the asset in its surroundings helps.
- Annotate with an arrow if the problem area isn't obvious.

See [Photos and attachments](#).

## 5. Submit

Tap **Submit**.

- Online: the request uploads immediately. A toast confirms.
- Offline: the request queues in the outbox. **Pending uploads** on the Dashboard increments. It uploads automatically when connectivity returns.

## What happens after submission

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1. The request enters the Supervisor's queue with status **Submitted**.
2. A Supervisor or Admin **acknowledges** it (status → **Acknowledged**).
3. They either assign it for immediate repair or schedule it.
4. A technician resolves it, which generates a **Repair task** linked back to your original request.
5. The status moves to **Resolved** → **Closed**.

You receive push notifications at each status change (if you have the notification category enabled — see [Notifications \(mobile\)](#)).

## Track your open requests

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Menu → **Repair requests** → **Mine**. You see every request you've raised, with its current status. Tap any row to open details — including the Supervisor's acknowledgement time and any response notes.

## When a Supervisor asks you for more detail

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If your request was submitted too thin, the Supervisor may ask follow-up questions via the notes field or in person. Update the request:

1. Open it in **Repair requests** → **Mine**.
2. Tap **Add note**.
3. Type your response. Optionally attach another photo.
4. Submit.

## Things to watch for

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### ALWAYS INCLUDE A PHOTO

Photos roughly double the Supervisor's ability to triage correctly. Even a blurry photo helps.

### DON'T DUPLICATE REQUESTS

If you raise a request, then find the same problem on the same asset an hour later, don't raise a second one. Add a note to the original instead.

### OFFLINE REQUESTS LOOK PENDING

If you're offline when you submit, the request appears in **Mine** with status **Pending upload**. Once it syncs, the status updates. Don't try to re-submit.

## Common patterns

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### Mid-task finding

You're executing a lubrication task and notice the seal is cracking. Don't halt the task:

1. Finish the task (the lubrication still needs doing).
2. Before submitting the task, note the finding in the task's notes field ("cracked seal, see repair request").
3. Submit the task.
4. Raise a repair request for the seal, with photo.

### End-of-walk finding

You spot something on your way between tasks:

1. Raise the repair request immediately while the detail is fresh.

2. Continue your scheduled work.

## Critical finding

You see something actively dangerous:

1. First, address the immediate safety (radio the line, engage emergency stop if required).
2. Raise the repair request with priority **Critical**.
3. Follow up with a shutdown report if production stopped — see [Reporting a shutdown](#).

## Troubleshooting

Problem	Fix
Form won't submit	Check required fields (asset, failure type, description, priority)
Photo upload fails after submit	Request still submits; photo retries — <a href="#">Photo upload is failing</a>
Don't see the right failure type	Ask your Admin to add it to <a href="#">Master data</a>
Status never moves	Supervisor may be backlogged; follow up via radio or in person

## Related topics

- [Reporting a shutdown](#) — for production halts.
- [Executing a task](#) — most repair requests come from mid-task findings.
- [Photos and attachments](#) — attach photos effectively.
- [Master data > Repair requests](#) — where the failure-type list lives.
- [Technician handbook](#)

# Report a shutdown

Report an equipment or line shutdown — planned or emergency — from the field.

## REQUIRED ROLE

Technician, Mapper, Admin, PegotecUser (any mobile-enabled role with `mobile.shutdown.report`).

## Overview

A shutdown report records that production has stopped or is about to stop on an asset or line. It's distinct from a repair request:

Situation	Action
Something is broken but the line still runs	<a href="#">Repair request</a>
Line is stopped, or will stop imminently, or safety engaged	<b>Shutdown report</b> (this page)
Both — broken equipment caused a line stop	<b>Both</b> (shutdown report first, then repair request for the fix)

Shutdown reports go to Supervisors and Admins in real time. They feed the Shutdown Report, Asset Availability, and OEE reports — shutdown data is the single most important input for those metrics.

## Prerequisites

- You're at (or near) the affected equipment.
- You know — or are able to identify — the reason for the shutdown.

## Steps

### 1. Open the shutdown form

#### From a task you're executing

1. Three-dot menu inside the task.
2. Tap **Report shutdown**.
3. The form pre-fills with the asset you're working on.

#### From an asset in the hierarchy

1. Open the asset in the hierarchy browser.
2. Tap **Report shutdown**.

#### From the main menu

1. Menu → **Shutdown**.
2. Tap **Select asset** to pick the affected equipment, or scan its NFC tag / barcode.

### 2. Fill in the form

Field	Required	Notes
<b>Asset / Line</b>	Yes	Scope — a single asset, or the whole line.
<b>Reason</b>	Yes	From the master list of shutdown reasons configured by your Admin.
<b>Start time</b>	Yes	When the shutdown began. Defaults to now but can be back-dated.
<b>End time</b>	Optional	Leave blank if still ongoing. Fill in later when production resumes.
<b>Description</b>	Yes	What happened. Specific: "Line 3 tripped on overload at conveyor 2, unclear cause, maintenance en route."
<b>Priority / severity</b>	Yes	Low / Medium / High / Critical. Most shutdowns are Medium or higher.
<b>Photos</b>	Recommended	Photos of the symptom, any warning lights, the affected area.
<b>Safety concern?</b>	Yes / No	If yes, prompts for additional safety details.

### 3. Priority guidance

Severity	When to use
Low	Minor stop, resolved quickly, no production loss worth flagging. Rare to use — if it's this low, consider a repair request instead.
Medium	Production slowed or paused briefly. Routine recovery.
High	Significant production loss expected. Customer commitments at risk.
Critical	Safety incident, major equipment damage, extended outage anticipated. Escalate verbally <b>and</b> via the shutdown report.

#### DON'T REPORT CASUALLY

Shutdown reports drive OEE and capital-planning decisions. Reporting a 30-second stop as a 3-hour shutdown distorts the data. If you're not sure, note the actual observed stop time and let the Supervisor adjust.

### 4. Safety flag

If you tick **Safety concern**, additional fields appear:

- **Hazard type** — electrical, chemical, mechanical, fall, etc.
- **Personnel affected** — number of people who were in the area.
- **Injuries** — yes / no, with details if yes.

Safety-flagged reports fan out immediately to the safety officer, Admin, and all Supervisors.

### 5. Photos

Strongly recommended. Specifically useful:

- The warning light or alarm message.
- The visible symptom (leak, smoke stain, tripped breaker).
- The affected equipment in its stopped state.

See [Photos and attachments](#).

### 6. Submit

Tap **Submit**.

- Online: the report uploads immediately; your Supervisor receives a push notification within seconds.
- Offline: queued in the outbox; uploads as soon as connectivity returns.

### **DON'T WAIT FOR SIGNAL TO SUBMIT A CRITICAL SHUTDOWN**

Submit anyway. The app queues locally and escalates verbally while the upload is pending. If the report is critical and you're offline, also radio or call your Supervisor in parallel.

## Updating a shutdown you submitted

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Shutdowns are often open for hours. Update as facts change:

1. Menu → **Shutdowns** → **Mine**.
2. Open the one you submitted.
3. Tap **Update**. Add notes, new photos, or set the **End time** when production resumes.
4. Save.

Updates are visible in real time on the Supervisor's dashboard.

## Closing a shutdown

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Technicians can submit updates; only **Supervisors and Admins** mark a shutdown **Resolved** in the web portal. Your job from the field is to report accurately and keep the report current until someone closes it.

## Relationship to repair requests

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A shutdown and a repair request often go together:

- The **shutdown** records that production stopped and for how long (feeds OEE).
- The **repair request** records what needs to be fixed (feeds the maintenance backlog).

For the same incident, file both. They'll be cross-linked in reports.

## Planned shutdowns

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If you're shutting down intentionally for maintenance:

- A Supervisor or Admin usually creates the shutdown on the web portal **before** the stop.
- As the technician performing the work, you execute your tasks as normal.
- The web portal flags the window as planned on the Shutdown Report so it doesn't inflate unplanned-downtime metrics.

If you need to report a planned shutdown from mobile (because nobody set it up in advance), set **Reason** to "Planned maintenance" and add a clear note.

## Things to watch for

### REPORT ONCE, UPDATE OFTEN



Don't submit three shutdown reports for the same incident. File once. Update as facts change. Duplicate reports corrupt the OEE report.

### NOTE THE STARTING POINT EXACTLY



If you're unsure when the line actually stopped, ask the operator. A ten-minute error on start time ripples through weekly and monthly OEE numbers.

### END TIME MATTERS MORE THAN YOU THINK



Forgetting to update the end time when production resumes leaves the shutdown apparently open for days. Supervisors follow up, but you can save everyone time by closing the loop from the field.

## Common patterns

### Emergency shutdown (line tripped)

1. Ensure immediate safety — engage lock-out if needed, radio the line lead.
2. Raise the shutdown report — priority **Critical** or **High** depending on cause.
3. While the response team works, take photos.
4. Raise a repair request for the underlying cause.
5. When production resumes, update the shutdown with the end time.

### Safety incident

1. Immediate response per your site's safety protocol.
2. Shutdown report with **Safety concern** ticked.
3. Photos of the area (not of injured people).
4. Critical priority.

### Short technical stop

1. Shutdown report, priority **Low** or **Medium**, start and end time.
2. Optional repair request if there's underlying work to do.

## Troubleshooting

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Problem	Fix
Can't submit — required field missing	Check asset, reason, start time, description, priority are all filled
"Reason" list missing an option	Ask your Admin to add it to <a href="#">Master data</a>
Report submitted to wrong asset	Open in <b>Shutdowns</b> → <b>Mine</b> and update
Supervisor didn't receive notification	Check with them directly if Critical; otherwise their dashboard has the real-time feed

## Related topics

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- [Repair requests](#) — the maintenance-backlog side.
- [Photos and attachments](#)
- [Shutdowns \(web portal\)](#) — Supervisor view.
- [Reports > Shutdown Report](#)
- [Master data > Shutdown reasons](#)
- [Technician handbook](#)

# Working offline

---

How the mobile app behaves without a network connection — what works, what caches, and what happens when you reconnect.

## REQUIRED ROLE

Any mobile-enabled role (Technician, Mapper, Admin).

## Overview

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The mobile app is **offline-first**. This isn't a backup mode — it's the primary design assumption. A technician can walk an entire shift through a steel-clad plant with no signal, execute every assigned task, capture photos, raise repair requests, and have all of it sync automatically the moment they step back into range.

This matters because real maintenance work happens in places where networks don't: basements, cold rooms, Faraday cages of stainless steel, remote sites, underground facilities.

## What works offline

---

Everything that a technician needs to do the job:

- Open any task assigned to you.
- Execute a task — fill forms, acknowledge safety, capture photos.
- Save a task as a draft and come back to it later.
- Submit a task (it queues for upload).
- Scan NFC tags and barcodes (no network needed — the matching task point is resolved from the local cache).
- Browse the asset hierarchy.
- Submit a repair request.
- Report a shutdown.
- View your task history.
- Switch language.

For mappers, creating hierarchy nodes and writing NFC tags also work offline — the changes queue for upload.

## What doesn't work offline

Only things that inherently require a round-trip to the server:

- Signing in for the first time after a factory reset (pairing needs network).
- Downloading updates to the hierarchy, master data, or translations that happened on the server after your last sync.
- Viewing another technician's work in real time.
- Receiving push notifications for new assignments (they arrive the next time you have signal).
- Approving / rejecting tasks (supervisors rarely use mobile for this anyway).

## What the app caches on your device

The cache lives in encrypted on-device storage. It holds:

Data	Refreshed every
Your assigned tasks	Sync cycle (~15 min) or WebSocket event
Asset hierarchy for your company	Sync cycle — incremental (delta sync)
Components and their options	Sync cycle
Safety procedures	Sync cycle
Master data (units, products, tools, thresholds)	Sync cycle
Translations for your language	Sync cycle
Your profile and settings	Sync cycle
Photos queued for upload	Until uploaded
Task drafts (in-progress work)	Until submitted or discarded

The app does **not** cache:

- Other technicians' tasks.
- Historical reports beyond what the Task History screen pulls on demand.
- Photos you've already uploaded (once uploaded, they're fetched from the server when you view them).

## The outbox: what's waiting to upload

---

When you're offline and submit a task, raise a repair request, or attach a photo, it goes into an **outbox** on the device. The Dashboard badge shows **Pending uploads: N** so you always know what's queued.

Items in the outbox:

- Submitted task forms.
- Uploaded photos.
- Task drafts that are saved but not submitted (these don't count as "pending upload" until you submit).
- Safety acknowledgement timestamps.
- Created hierarchy nodes (mappers).
- Written NFC tag registrations (mappers).

When the device reconnects, the outbox drains in the background. Photos upload separately from form data — form submissions usually clear first, then photos trickle in.

## How the app knows it's offline

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Several signals:

- The OS reports no network (most reliable).
- API calls time out.
- The WebSocket connection drops.

When the app considers itself offline, the sync indicator on the Dashboard changes colour, and push notifications stop arriving (they'll backfill when the connection returns).

## The reconnection flow

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When you come back into signal, within a few seconds:

1. The app detects network is back.
2. It pings the server's health endpoint.
3. If the server responds, sync starts.
4. The outbox uploads in priority order: form submissions first, photos second, mapper changes last.

5. The app pulls any server-side changes since your last sync (new assignments, hierarchy edits, master data updates).
6. The WebSocket reconnects for real-time updates.
7. The **Pending uploads** badge counts down to zero as items succeed.

If an item fails to upload (server rejects it, network drops again), it stays in the outbox and retries on the next sync cycle.

## Conflict resolution

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Rarely, a task you've executed offline conflicts with server-side changes:

- **Task was reassigned to someone else.** Your submission is rejected; you're notified.
- **Task was deleted.** Your submission is rejected; you're notified.
- **Task fields changed.** Your submission is rejected; you're notified and can review the new version.

The default conflict-resolution policy is **server wins**. Your local work isn't discarded silently — you see a clear notification and can export the draft as text if the data is worth preserving.

Conflicts are rare in practice because supervisors don't edit in-progress tasks.

## Draft persistence

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Drafts are saved to the local database on every field change — there's no "lose your work when the battery dies" failure mode. You can:

- Save a draft explicitly (**Save draft** button).
- Close the app — drafts persist.
- Kill the app process — drafts persist.
- Restart the device — drafts persist.
- Factory reset — **drafts are lost**. Don't factory reset with unsynced drafts.

## Offline safety considerations

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A few things to keep in mind:

### TIME SYNCHRONISATION

Offline timestamps use the device's clock. If the clock is badly wrong, your submission times look wrong on the server. Keep automatic date/time sync enabled at the OS level.

### VERY OLD DRAFTS

If a draft has been sitting for a week unsynced, the task it references may have changed on the server. Check with your Supervisor before submitting.

### CHECK PENDING UPLOADS AT END OF SHIFT

Before you put the device down, glance at the Dashboard. If **Pending uploads** isn't zero and you're on Wi-Fi, wait a minute for it to clear. If it's still non-zero, see [Sync is stuck or failing](#).

## Storage and battery

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The cache can grow to a few hundred MB on a large plant. If storage is tight:

- **Settings** → **Clear cache** removes cached hierarchy / master data (they re-download on next sync).
- Clearing cache never removes drafts or pending uploads.
- Photos queued for upload are the biggest storage consumers — they compress on-device, but several large photos can still add up.

Battery impact of offline work is minimal. The expensive operations are camera / photo compression and GPS (not used heavily). Background sync cycles are short and batched.

## Verify the app is healthy while offline

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Spot-check occasionally:

- Dashboard loads without errors.
- Tapping **Tasks** shows your assigned list.
- Opening a random task shows the full form definition.
- Opening the hierarchy shows your expected tree.

If any of these are broken while offline, the cache may be corrupt or your sign-in session may have expired. See [Sync is stuck or failing](#).

## Related topics

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- [Sync and connectivity](#) — the mechanics of background sync.
- [Executing a task](#) — the main offline-capable workflow.
- [Task drafts](#) — saving work in progress.
- [Sync is stuck or failing](#) — when the outbox won't drain.

# Sync and connectivity

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How the mobile app talks to the server — background sync cycles, real-time updates, and how to trigger a sync manually.

## REQUIRED ROLE

Any mobile-enabled role.

## Overview

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The mobile app stays in step with the server using three mechanisms:

1. **Background sync** — a scheduled cycle that runs every 15 minutes, whether the app is open or not.
2. **Real-time WebSocket** — a persistent connection that pushes live updates while the app is in the foreground.
3. **Manual sync** — pull-to-refresh or the **Force sync** button, for when you want to pull changes immediately.

If the device is offline, everything queues. Work you do offline saves locally; on reconnect, the outbox uploads and server-side changes download. See [Working offline](#).

## Background sync

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The app runs a sync cycle every ~15 minutes:

- **Android:** cadence is usually tight to the 15-minute mark unless the device is in low-power / battery-saver mode.
- **iOS:** the operating system aggressively throttles background work — cadence can stretch to **15–60 minutes** based on battery level, whether the device is on charge, how often you use the app, and whether Low Power Mode is on.

If you need an update immediately rather than waiting for the next cycle, use **Settings → Force sync** or pull-to-refresh on the Dashboard.

## What a sync cycle does

Each cycle performs:

1. **Upload** pending items from the outbox:

- Submitted task forms.
- Photos queued for upload.
- Mapper changes (created hierarchy nodes, written NFC registrations).
- Repair requests and shutdown reports.

2. **Download** server-side changes:

- New task assignments.
- Updated hierarchy (delta sync — only what's changed since the last cycle).
- Updated master data.
- Translation updates.
- Profile / role changes.

3. **Refresh** caches where needed.

Background sync is **delta-based**, not full-download. On a mature installation, a sync cycle is fast — it only transfers what's changed.

## Battery impact

Minimal. Each cycle takes a few seconds on good connectivity and does no work if there's nothing to upload or download. The OS further throttles the cycle when the device is on low battery.

## Real-time WebSocket

---

When the app is in the foreground, it holds a persistent WebSocket connection to the server. This delivers **instant** updates for:

- New task assignments pushed to you by a Supervisor.
- Task approval / rejection by a Supervisor.
- Repair request status changes on requests you raised.
- Shutdown updates relevant to your assets.

The real-time connection is encrypted and pinned to the server's TLS certificate, so it's safe against ordinary network interception.

## Connection indicator

On the Dashboard, a small icon shows the WebSocket state:

- **Green** — connected, live updates flowing.

- **Orange** — reconnecting.
- **Red** — disconnected; updates will catch up on next background cycle.

## When the WebSocket doesn't run

- When the app is backgrounded or killed (iOS and Android both suspend the socket).
- When the device is offline.
- When a corporate firewall blocks WebSocket upgrades.

In all these cases, background sync still delivers updates — just a little later.

## What the fallback looks like

When the connection indicator is **orange** or **red**, the live WebSocket is down but the app is not broken:

- New assignments still arrive — on the next background cycle (every ~15 minutes on Android, up to 60 min on iOS).
- Submissions still upload — via the outbox on the next cycle, or immediately if you pull-to-refresh.
- Approvals and rejections still reach you — on the next cycle, with a slight delay.

The practical effect of a disconnected WebSocket is: you see updates 1–15 minutes late instead of instantly. Nothing is lost, just delayed. If your site has chronic WebSocket blocking (corporate firewall), the app is still fully usable — you'll just rely on pull-to-refresh for "right now" views.

## Manual sync

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Three ways to force an immediate sync:

### Pull-to-refresh on the Dashboard

Drag down from the top of the Dashboard. A spinner appears. Within a few seconds, the app pushes the outbox and pulls down server changes.

### Settings → Force sync

**Settings → Force sync** runs the same cycle as pull-to-refresh, with a more detailed progress view. Useful when you want to see exactly what's uploading and downloading.

## On app open

Every time you open the app, a light sync runs automatically to catch up on anything that happened while the app was backgrounded.

## Sync on specific events

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The app also triggers small, targeted syncs on specific events:

- **After submitting a task** — tries to upload immediately if connected.
- **After taking a photo** — photo upload starts right away if connected.
- **After tapping a notification** — syncs the specific entity the notification references.

## The Pending uploads badge

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The Dashboard shows a badge: **Pending uploads: N**. It counts:

- Submitted tasks waiting to upload.
- Photos waiting to upload.
- Mapper changes waiting to upload.

When **N > 0**, you have work queued locally. When it reaches **0**, everything's been accepted by the server.

### END OF SHIFT CHECK

Before you put the device down, verify **Pending uploads = 0**. If it's not, move to a location with good signal and give it a minute. If it still won't clear, see [Sync is stuck or failing](#).

## Photo upload specifics

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Photos upload **separately** from form data — typically after the form submission succeeds. Why:

- Photos are much larger than form data.
- A flaky network can complete a small form upload and fail the photos.
- Uploading them separately means a form submission isn't blocked by photo failures.

The app tries each photo a few times before marking it failed; failed photos stay in the outbox and retry on the next cycle.

## Token refresh

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The access token the app uses to authenticate with the server expires and refreshes automatically in the background. You won't notice this unless:

- Your password changes on the server side — you'll be signed out and need to sign in again.
- Your account is deactivated — same.

## Handling server-side schema changes

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When the server deploys a new version that changes the data model (new fields on a form, new task type), the app pulls those changes on the next sync cycle. Form rendering is dynamic — the app doesn't need an update to show new fields.

If a schema change introduces a field the app genuinely can't render (rare), you'll see a prompt to update the app.

## Things to watch for

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### OLD DEVICE CLOCK

The server trusts timestamps from the device. If the device clock is wrong, your submission times look wrong on the server. Keep automatic time sync on at the OS level.

### AGGRESSIVE BATTERY SAVERS

Some Android manufacturers (particularly Samsung, Xiaomi, Huawei) ship with aggressive battery savers that kill background jobs from any app. If background sync isn't running reliably on one of these devices, exempt the app in the phone's battery settings.

### WI-FI VS MOBILE DATA

The app doesn't care which network you're on. If you're on unmetered Wi-Fi, syncs are slightly faster because photos upload in parallel. On metered mobile data, the app can be configured to defer large photo uploads until Wi-Fi returns (Settings → Data usage).

## Troubleshooting

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Problem	See
Pending uploads won't clear	<a href="#">Sync is stuck or failing</a>
New assignments aren't appearing	Pull-to-refresh, then check <a href="#">Tasks aren't showing</a>
Photos stuck uploading	<a href="#">Photo upload is failing</a>
WebSocket indicator stays red	Firewall may block; background sync will still run
Background sync never runs on this device	Check battery saver / doze settings

## Related topics

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- [Working offline](#) — the offline-first design.
- [Executing a task](#) — where sync most often matters.
- [Settings](#) — where the Force sync button lives.

# Notifications (mobile)

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Configure push notifications and the in-app notification feed: task assigned, task due soon, task overdue, repair request updates, shutdown alerts.

## REQUIRED ROLE

Any mobile-enabled role.

## Overview

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The mobile app surfaces notifications on three paths:

- **Push** — system push notifications arrive on the device even when the app is backgrounded or closed.
- **In-app feed** — a persistent list of every notification you've received, accessible even offline.
- **Banners** — while you have the app open, new events also pop a small banner at the top.

You can enable or disable categories individually, and you can mute push entirely at the OS level if you need to.

## Prerequisites

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- The app is installed, paired, and signed in. See [Pairing and setup](#).
- You granted **Notifications** permission on first launch (Android 13+) or pre-launch (iOS).

## Categories

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Each category can be toggled on or off per channel:

Category	Default	Who typically enables
Task assigned to me	On	Technicians, Mappers
Task due soon (1 hr before due)	On	Technicians
Task overdue	On	Technicians, their Supervisors
Task approved	On	Technicians who just submitted
Task rejected	On	Technicians who just submitted
New repair request	On	Supervisors, Admins
Repair request updated	On	The technician who raised it
New shutdown reported	On	Supervisors, Admins
Shutdown resolved	On	The technician who reported it

See [Notifications reference](#) for the full list with recipient rules.

## Open the notifications feed

Tap the bell icon in the top-right of most screens. The feed slides open with the most recent notifications first.

Each item shows:

- Icon / category colour.
- One-line summary.
- Timestamp (relative).
- Unread dot if not yet opened.

Tap a notification to:

- Mark it read.
- Jump to the referenced entity (task, repair request, shutdown).

## Change notification preferences

### In-app

Menu → **Settings** → **Notifications**. You see the category matrix:

Category	In-app	Push
Task assigned	<input type="checkbox"/>	<input type="checkbox"/>
Task due soon	<input type="checkbox"/>	<input type="checkbox"/>
Task overdue	<input type="checkbox"/>	<input type="checkbox"/>
...	...	...

Toggle individual cells. **Save**.

## At the OS level

To silence push entirely without changing the app's own preferences:

### ios

Settings → Notifications → Smart Maintenance → toggle **Allow notifications** off.

### Android

Settings → Apps → Smart Maintenance → Notifications → toggle off.

OS-level disable is all-or-nothing. Use the in-app per-category toggles for finer control.

## Tapping a notification

Deep-links based on category:

Notification	Taps to
Task assigned	The new task's detail screen.
Task due soon	Same task.
Task overdue	Same task.
Task approved	The task in history.
Task rejected ( <i>deep-link pending</i> )	Opens the notifications list — tap again to navigate.
Task escalation ( <i>deep-link pending</i> )	Opens the notifications list.
Repair request updated ( <i>deep-link pending</i> )	Opens the notifications list.
New shutdown	The shutdown report.
Shutdown resolved	Same shutdown.
Export ready ( <i>see below</i> )	Opens the notification detail with a copy-to-clipboard link.

If the app was closed, it opens, signs you in from stored credentials (biometric / PIN if configured), and navigates to the target entity.

### **SOME DEEP-LINKS ARE NOT YET IMPLEMENTED**

A handful of notification types — task rejection, escalation, repair request updates — currently open the notifications list rather than jumping to the referenced entity. Tap the item from the list to open the entity. Direct deep-linking for these categories is on the mobile-app roadmap.

## **Downloading an export from a mobile notification**

When an async export (from the web portal) finishes, an **Export ready** push notification arrives on your mobile app. On iOS and Android, the mobile app **does not auto-download** the file. To retrieve it:

1. Tap the notification.
2. Copy the download link shown on the notification detail screen.
3. Paste the link into a browser on the same device, or email it to yourself to download on a desktop.

Remember the export is **single-download** and expires after 7 days — once downloaded, the link no longer works for anyone else.

The web portal, by comparison, auto-downloads exports when you tap the equivalent notification. Mobile download parity is on the roadmap.

## **How push notifications are delivered**

- When a triggering event happens (task assigned, shutdown reported, etc.), the server sends a push.
- Your device receives it even when the app is backgrounded or closed.
- **Android:** typically arrives within seconds.
- **iOS:** seconds to a few minutes, depending on system delivery state.

Push is **not guaranteed** — treat it as "a helpful nudge". For critical categories (overdue, critical shutdown), the app also updates the in-app feed, which is authoritative.

## **Real-time banners**

While the app is foregrounded and connected:

- New assignments, approvals, and shutdowns drop a banner at the top.
- Banners auto-dismiss after ~4 seconds.

- Tap the banner to jump to the entity.

If the connectivity indicator is red, banners don't appear — the feed updates when sync runs.

## Notifications while you're offline

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- Incoming push notifications delivered while you're offline are **buffered** and typically arrive when you come back online (within a few weeks at most).
- The in-app feed doesn't receive new entries while offline, but backfills from the next sync.
- You always see notifications that were generated while you were offline — just a bit delayed.

## Do-not-disturb patterns

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The app doesn't have a built-in DND. Two patterns work:

1. **OS quiet hours** — iOS Focus / Android Do Not Disturb. Silences push at night. In-app feed still captures.
2. **Per-category mute** — turn off specific noisy categories in **Settings → Notifications**.

## Things to watch for

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### **DON'T DISABLE "TASK ASSIGNED"**

If you can't see new assignments, the whole point of the mobile workflow breaks. Keep it on.

### **USE OS QUIET HOURS RATHER THAN DISABLING CATEGORIES**

OS-level DND is reversible automatically in the morning. Per-category disables you might forget about.

### **SOME CATEGORIES AREN'T NEGOTIABLE**

Task rejected always shows in-app regardless of your settings — rejecting rework that you don't know about isn't a workable pattern.

## Troubleshooting

---

Problem	Fix
Not receiving push	Check OS-level notifications permission; check app-level category toggles; check you're signed in
In-app feed empty	May genuinely be empty; or feed hasn't synced — pull-to-refresh
Tapping a notification doesn't go anywhere	The referenced entity may have been deleted; feed will update on next sync
Push arrives but in-app feed doesn't update	WebSocket may be disconnected; background sync will catch up
Delivery feels slow	iOS aggressively batches — normal unless minutes turn to hours

## Related topics

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- [Notifications \(web portal\)](#) — the browser side.
- [Notifications reference](#) — every category with recipient rules.
- [Sync and connectivity](#) — how notifications and sync relate.
- [Settings](#)
- [Working offline](#)

# Browse the hierarchy

---

Navigate the five-level asset tree on the mobile app — search, expand, filter, and jump to a task point without having to scan anything.

## REQUIRED ROLE

Any mobile-enabled role.

## Overview

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NFC and barcode scanning are the fast paths to a specific task point. But sometimes you can't scan:

- The tag is damaged.
- You're nowhere near the asset.
- You're looking for something you haven't been to before.

The **Hierarchy browser** is the alternative. It's a scroll-and-tap view of the whole asset tree — Site → Line → Section → Asset → Task Point — so you can drill to any task point from the menu.

## Prerequisites

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- App is paired and signed in.
- Initial sync has completed (the hierarchy is cached locally).

## Open the hierarchy

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Menu → **Hierarchy**, or tap the hierarchy icon in the bottom navigation (if your device layout shows it).

You see a tree rooted at **Production Sites**. By default, only the top level is expanded.

## Expand / collapse

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- Tap the chevron next to any node to expand.
- Tap again to collapse.
- Long-press a node for **Expand all descendants** or **Collapse all descendants**.

The expand state persists while you stay on the hierarchy screen. Leaving and coming back resets to the default collapsed view.

## Search

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A search bar at the top of the hierarchy screen:

1. Tap the bar.
2. Type part of the name of any node at any level — site, line, section, asset, task point.
3. Matching nodes appear as a flat list with their breadcrumb.
4. Tap a result to open.

Search is case-insensitive and matches anywhere in the name (not just prefix).

### SEARCH BEATS BROWSING

If you know the name, search is faster than drilling. 3-letter search queries usually land within a second.

## Open a node

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Tap any node:

- **Production Site / Line / Section / Asset** → detail page. Shows basic metadata and child nodes. You can't execute work at these levels — keep drilling.
- **Task Point** → detail page with the task(s) attached. Tap a task to start.

## Filters

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The filter icon in the top-right:

- **Only nodes with open tasks** — hides anything without scheduled or assigned work.
- **Only nodes assigned to me** — narrows to what's in your queue.
- **Specific task type** — Electrical / Lubrication / Mechanical / Production / Repair request.
- **Specific production site** — only assets under that site.

Filters combine. Clear them via **Reset filters**.

## Favourites (if enabled on your installation)

---

Some installations allow you to star specific nodes you visit often:

1. Open the node.
2. Tap the star icon.

Starred nodes appear in a **Favourites** tab at the top of the hierarchy. Useful for the five or six task points you work on daily.

## Offline behaviour

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The hierarchy is cached fully. Everything on this page works offline:

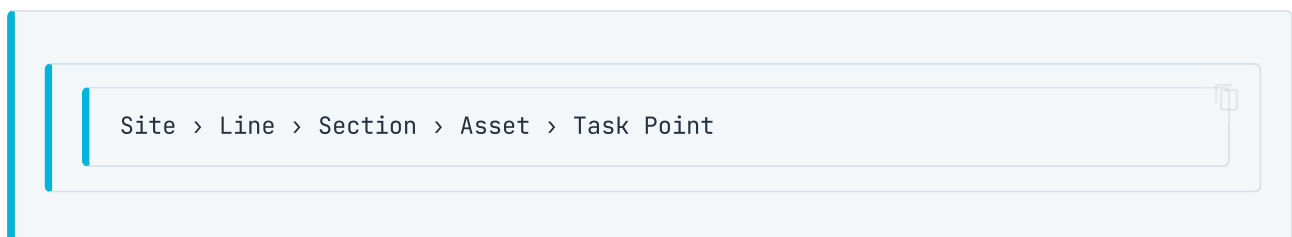
- Expand / collapse.
- Search.
- Filters.
- Open any node.

Changes you or someone else makes on the web portal propagate to your cache on the next sync cycle (every ~15 min).

## What the breadcrumb shows

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Every node's detail page has a breadcrumb trail at the top:



Tap any segment to jump up the tree. Useful if you want to go from one task point to a sibling on the same asset without backtracking.

## Things to watch for

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### LEARN THE NAMES THAT MATTER

After a week you'll know the names of the 20 lines you work on. Search by those; skip the tree navigation entirely.

### STALE CACHE LOOKS LIKE MISSING DATA

If a task point someone told you about doesn't appear in the tree, your cache may be behind. Pull-to-refresh on the Dashboard to force a sync.

**FILTERS PERSIST**

The filter icon shows a dot when filters are active. If the hierarchy looks surprisingly sparse, check the filters first.

## Common patterns

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### Jumping to a known task

1. Menu → Hierarchy.
2. Search for the asset name.
3. Tap the result.
4. Tap the task.

Total: ~5 seconds.

### Exploring an unfamiliar line

1. Menu → Hierarchy.
2. Filter by the line's production site.
3. Expand the line.
4. Browse its sections and assets.

### Verifying structure as a mapper

1. Open the hierarchy to the level you just created.
2. Confirm the breadcrumb and metadata.
3. Use **Creating hierarchy** to add / correct (see [Creating hierarchy](#)).

## Troubleshooting

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Problem	Fix
Tree is empty	Initial sync hasn't completed; wait, or force sync
Can't find an asset that should exist	Clear filters; check spelling; force sync
Search is slow	Large plant + old device; use filters to narrow before searching
Tapping a node does nothing	Rare UI freeze; kill the app and reopen
Can't open a task from a task point	Check you're the assigned technician — viewing vs executing is role-gated

## Related topics

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- [Scanning NFC tags](#) — the fastest way when a tag exists.
- [Scanning barcodes](#) — alternative to NFC.
- [Executing a task](#) — after you've found the task point.
- [Creating hierarchy](#) — editing from mobile.
- [Asset hierarchy \(web portal\)](#) — same data model on the web side.

# Create and edit hierarchy

Build asset hierarchies on the mobile app — typically during on-site mapping sessions where having the equipment in front of you helps you model it accurately.

## REQUIRED ROLE

Mapper.

## Overview

The web portal is the comfortable place to build a hierarchy at a desk with a CSV import in hand. The mobile app is for the other half of mapping: on-site, standing next to the equipment, with a phone to write NFC tags immediately, and a camera to capture reference photos as you go.

The same five-level model applies: **Production Site** → **Line** → **Section** → **Asset** → **Task Point**. Anything you create on mobile appears on the web portal after the next sync.

## When to use mobile vs web

Situation	App
Entering 200 assets from an existing spreadsheet	<b>Web</b> (CSV import)
Walking a new production line and modelling it as you go	<b>Mobile</b>
Creating a task point and writing its NFC tag in one motion	<b>Mobile</b> (web can't write tags)
Bulk rename or reorder	<b>Web</b>
Taking reference photos during mapping	<b>Mobile</b> (camera in-app)
Inviting a new technician	<b>Web</b> (user management isn't available on mobile)

## Prerequisites

- You have the **Mapper** role.
- You're physically at the site (optional but the whole point of mobile mapping).
- Enough blank NFC tags in your pocket for the task points you plan to create today (if tagging).

## Open the hierarchy for editing

---

Menu → **Hierarchy**. See [Browsing the hierarchy](#) for navigation basics.

To add to the tree:

- Tap the **+** button visible at each level.
- Or open a parent node and tap **Add child** in its detail screen.

## Create a Production Site

---

1. From the top of the hierarchy, tap **+ New site**.
2. Fill in:
  - **Name** — short, unique.
  - **Timezone** — often pre-populates to your company default.
  - **Address** — optional.
3. Save.

Sites are usually created once at installation time. You rarely create new ones after that.

## Create a Line

---

1. Open a Production Site.
2. Tap **+ New line**.
3. Fill in name and order.
4. Save.

## Create a Section

---

1. Open a Line.
2. Tap **+ New section**.
3. Fill in name.
4. Save.

Sections are optional. If a line is simple, skip straight to creating Assets under the Line.

## Create an Asset

---

1. Open a Section (or Line).
2. Tap **+ New asset**.
3. Fill in:
  - **Name** — asset code or equipment tag.
  - **Component type** — link to the existing component catalogue. This brings the component's default tasks onto the new asset. See [Components \(web portal\)](#).
  - **Photo** — optional; take a reference shot on the spot.
4. Save.

## Create a Task Point

---

1. Open an Asset.
2. Tap **+ New task point**.
3. Fill in:
  - **Name** — specific ("Main bearing grease point" not "grease point").
  - **Description** — optional, useful for odd-location points.
  - **Position indicator** — optional ("north side", "lower drive shaft").
  - **Photo** — optional reference photo.
4. Save.

## Write a tag immediately

After saving a task point, the app offers **Write NFC tag** as the next action. If you have a blank tag on you:

1. Tap **Write NFC tag**.
2. Hold the blank tag against the phone.
3. Confirm the write.
4. Physically apply the tag.
5. Test-scan.

See [Writing NFC tags](#).

## Edit an existing node

---

1. Open the node.
2. Tap the edit (pencil) icon.
3. Change what you need to.
4. Save.

Edits propagate to everyone on the next sync.

## Delete a node

---

1. Open the node.
2. Three-dot menu → **Delete**.
3. The app warns you about children and dependencies (tasks, NFC tags).
4. Confirm.

### DELETION CASCADES

Deleting a parent deletes all its children. Use sparingly. Deactivation (via the web portal) is usually safer.

## Reorder

---

1. Open the parent.
2. Enter reorder mode via the three-dot menu → **Reorder**.
3. Drag children up or down.
4. Save.

Order affects the display order on all apps.

## Offline creation

---

All of this works offline:

- Create, edit, reorder, delete.
- Changes queue in the outbox.
- Upload automatically on next sync.

Written NFC tags also work offline — the tag is physically written, and the registration syncs later.

If two mappers are editing the same hierarchy offline and submit conflicting changes, server-side conflict resolution applies (server wins for the same node; non-conflicting additions from both users all apply).

## Common mapping patterns

---

### Greenfield line

1. Create the Line.
2. Create its Sections (if any).
3. Walk down the line. At each asset:
  - Create the Asset with component type linked.
  - Create each Task Point.
  - Write the NFC tag for each Task Point.
  - Take reference photos.
4. Back at the desk, review on the web portal. Tidy anything that didn't translate well.

### Brownfield cleanup

1. Walk the plant with the existing hierarchy open in the Browser.
2. Where an asset doesn't exist in the system but exists in reality, create it from mobile.
3. Where the system has something that no longer exists physically, make a note to deactivate it on the web portal later.
4. Reconcile on the web portal after the walk.

### Adding a single task point

1. Menu → Hierarchy → drill to the asset.
2. Tap **+ New task point**.
3. Fill in, save, write tag.

Total: under a minute.

## What you can't do on mobile

---

- **CSV import / export** — web portal only.
- **Webmapping visual editor** — web portal only.
- **User management** — web portal only.

- **Master data editing** — web portal only (but you can reference it here).

## Things to watch for

### NAME CONSISTENTLY

The convention you picked at the start of mapping should be followed in the field. Sporadic divergence ("Line-01" vs "Line 1" vs "Line One") makes search hurt later.

### TAKE PHOTOS EVEN IF YOU THINK YOU WON'T NEED THEM

Storage is cheap; re-visits are expensive. One reference photo per asset when you map it saves many trips later.

### CREATING HIERARCHY DOESN'T TRIGGER SCHEDULES

A new task point with a component-inherited task doesn't auto-schedule. Scheduling happens separately on the web portal. See [Scheduling \(web portal\)](#).

## Troubleshooting

Problem	Fix
+ button is missing	You're not signed in as a Mapper
Component type dropdown is empty	Components haven't been created yet; do so on the web portal
NFC write fails right after creating the task point	Hold longer; try a fresh tag; see <a href="#">NFC is not working</a>
New asset not showing to technicians	Force sync on their device, or wait for the next cycle

## Related topics

- [Asset hierarchy \(web portal\)](#) — same data on the web side.
- [Browsing the hierarchy](#) — navigation.
- [Writing NFC tags](#) — the natural follow-up to creating a task point.
- [Components \(web portal\)](#) — the catalogue that task points reference.
- [Mapper handbook](#)

# Settings (mobile)

---

Review and change the app's configuration: API URL, language, security, notifications, storage, sync, and factory reset.

## REQUIRED ROLE

Any mobile-enabled role.

## Overview

---

Settings is the one-stop configuration menu for the mobile app. It's organised into sections, each handling one concern:

- **Account** — who you are, profile info.
- **Security** — biometric, PIN, lock timeout.
- **Notifications** — per-category preferences.
- **Language** — UI language.
- **Connection** — API URL, sync controls.
- **Storage** — cache usage, clear cache.
- **About** — app version, support links.
- **Factory reset** — wipe local data.

## Open Settings

---

Menu → **Settings**, or tap the gear icon in the top-right of the Dashboard (if present on your installation).

## Account

---

**Settings** → **Account** shows:

- Your name.
- Email.
- Username.
- Roles.

- Company name.

Most fields are **read-only** on mobile. To edit, open the web portal's [Profile and settings](#).

## Sign out

**Settings** → **Account** → **Sign out** ends the session:

- Your credentials are cleared from the device.
- Local cache remains (so sign-in is fast).
- Drafts and pending uploads **remain**.

To clear everything, use **Factory reset** instead.

## Security

---

See [Biometric unlock](#) for the full security story. The settings options here:

- **Biometric unlock** — on / off.
- **4-digit PIN** — change or reset.
- **Lock timeout** — Immediately / 1 min / 5 min / 15 min / Never.
- **Require unlock** — disable the app-level lock entirely (not recommended).

## Notifications

---

See [Notifications \(mobile\)](#). Quick link:

- **Categories** matrix — per-category on / off for push and in-app.
- **Quiet hours** (if enabled) — time window where push is suppressed.

For OS-level disable, follow the platform-specific path described in [Notifications \(mobile\)](#).

## Language

---

See [Language and locale](#).

- Pick from 14 supported languages.
- Applied immediately after save.
- Affects UI strings; doesn't translate data.

## Connection

---

### API URL

The base URL the app connects to. Pre-filled during [Pairing and setup](#); usually read-only.

### Active company

Shows which company context this device is paired to. Also read-only for most roles. PegotecUser see it as a switchable dropdown — tap to switch tenant.

### Force sync

**Settings** → **Force sync** triggers an immediate background sync cycle. Useful when:

- You've just assigned yourself work on the web portal and want to see it now.
- **Pending uploads** won't clear and you want to try again.
- You're not sure whether background sync is running.

Shows a progress view: uploading N items, downloading M items.

### Connection indicator

Green / orange / red showing WebSocket state. Same indicator as the Dashboard.

## Storage

---

### Cache size

Shows how much local storage the app currently uses. Typical range: 50 MB – 500 MB depending on plant size and photo backlog.

### Clear cache

Deletes the cached hierarchy, master data, and translations. Does **not** delete drafts or pending uploads.

Useful when:

- The cache is suspected corrupt (rare, but possible).
- You're low on device storage and want to reclaim the hierarchy cache.

After clearing, the next sync re-downloads what's needed — expect ~30–90 seconds.

## Pending uploads

Shows the current pending-upload count (also visible on the Dashboard). Tap to see the list of queued items:

- Submitted tasks waiting to upload.
- Photos waiting to upload.
- Mapper-created hierarchy nodes waiting to upload.
- Written NFC tag registrations waiting to upload.

Each item can be retried individually if it's stuck.

## About

---

- **App version** — the installed version number.
- **Build number** — internal identifier useful for support.
- **Last sync** — timestamp of the last successful sync cycle.
- **Device ID** — anonymous identifier for support diagnostics.

And links:

- **User handbook** — opens this handbook.
- **Report a bug** — opens your configured support channel.
- **View licences** — open-source licences for bundled libraries.

## Data usage

---

### Wi-Fi only uploads (if enabled)

Some installations expose a toggle: **Upload photos only on Wi-Fi**. When on, photos queue during mobile-data-only periods and upload when Wi-Fi returns.

Useful for data-limited contracts. Task form submissions always upload regardless (they're small).

## Factory reset

---

**Settings → Factory reset.**

Wipes the device clean:

- Signs you out.

- Clears the cache.
- **Deletes drafts.**
- **Deletes pending uploads.**
- Resets the API URL pairing.

The next time you open the app, you're back at the **Setup** screen and must pair again.

#### **FACTORY RESET DESTROYS UNSYNCD WORK**

Before tapping Factory reset, verify:

- **Pending uploads = 0** on the Dashboard.
- **Drafts** (Tasks → Drafts) is empty, or you've submitted / discarded everything meaningful.

Lost data from a factory reset is not recoverable.

## Developer options (internal only)

Some installations expose a hidden **Developer options** panel (tap the app version 7 times). It provides:

- Verbose log export.
- Force-refresh tokens.
- Feature flag overrides.

Used by Pegotec support during triage. Customer Admins don't usually need this.

## Things to watch for

#### **DON'T TAP FACTORY RESET CASUALLY**

It's the single most destructive action in the app. Two confirmations protect you, but lost drafts are unrecoverable. Check **Pending uploads = 0** first.

#### **CLEAR CACHE IS DIFFERENT FROM FACTORY RESET**

Clear cache only drops the read-through cache (hierarchy, master data). It keeps drafts and uploads. Useful and safe. Factory reset is the nuclear option.

#### **MOST SETTINGS ARE ONE-AND-DONE**

After initial pairing and setup, you rarely touch settings. Security, language, and notification preferences are set once and forgotten.

## Troubleshooting

---

Problem	Fix
Settings menu missing items described here	Some items are installation-specific; check with your Admin
Force sync does nothing	Confirm network; check <a href="#">Sync is stuck or failing</a>
Language change didn't apply	Sign out / sign in, or <a href="#">Language isn't updating</a>
Factory reset demanded unexpectedly	Session may have expired and login flow requires re-pair; or the installation key rotated

## Related topics

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- [Pairing and setup](#)
- [Biometric unlock](#)
- [Notifications \(mobile\)](#)
- [Language and locale](#)
- [Sync and connectivity](#)
- [Working offline](#)

# Reference

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# Reference

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Lookup tables and specifications. Use this section when you need a fact, not a walkthrough.

## Pages

---

- [Permissions matrix](#) — who can do what, at a glance.
- [Task types](#) — the five built-in task types with field-by-field reference.
- [Supported languages](#) — all 14 locales with native names and RTL notes.
- [System requirements](#) — browsers, iOS / Android versions, device specs.
- [Notifications reference](#) — every notification the system can send.
- [Icons and badges](#) — meaning of status icons and colour-coded badges.
- [File formats](#) — supported formats for photos, imports, and exports.

# Permissions matrix

---

Every built-in role and what it can do. A  means "has the permission",  means "does not have it".

## ROLE SCOPE

Every role except **PegotecUser** is scoped to a single company (their own tenant). PegotecUser is the only role that sees data across multiple companies.

## Capabilities

Capability	Technician	Mapper	Supervisor	Manager	Admin	Viewer	PegotecUser
<b>Dashboard</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View dashboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Tasks</b>							
View tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create tasks	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
Edit tasks	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
Delete tasks	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
Assign tasks	—	<input type="checkbox"/>	<input type="checkbox"/>	—	<input type="checkbox"/>	—	<input type="checkbox"/>
Approve / reject tasks	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
Execute tasks (mobile)	<input type="checkbox"/>	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
<b>Asset hierarchy</b>							
View hierarchy	—	<input type="checkbox"/>	<input type="checkbox"/>	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create / edit hierarchy	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
Delete hierarchy	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
<b>Components</b>							
View components	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create / edit / delete	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
<b>Scheduling</b>							
View schedules	—	<input type="checkbox"/>	<input type="checkbox"/>	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create / edit / delete	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
<b>Safety procedures</b>							
View safety	—	<input type="checkbox"/>	<input type="checkbox"/>	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Create / edit / delete	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>
<b>Reports</b>							
View reports	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Export reports	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Settings</b>							
View settings	—	<input type="checkbox"/>	—	—	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit settings	—	—	—	—	<input type="checkbox"/>	—	<input type="checkbox"/>

Capability	Technician	Mapper	Supervisor	Manager	Admin	Viewer	PegotecUser
<b>Users and roles</b>							
View users	—	☐	—	—	☐	—	☐
Create / edit / delete users	—	☐	—	—	☐	—	☐
View roles	—	☐	—	—	☐	—	☐
Create / edit / delete roles	—	—	—	—	☐	—	☐
<b>Companies</b>							
Manage companies	—	—	—	—	—	—	☐
<b>Mobile features</b>							
NFC scan	—	☐	☐	—	☐	—	☐
NFC write	—	☐	—	—	☐	—	☐
QR / barcode scan	☐	☐	☐	—	☐	—	☐
Execute task	☐	☐	—	—	☐	—	☐
Submit repair request	☐	☐	—	—	☐	—	☐
Report shutdown	☐	☐	—	—	☐	—	☐
Create hierarchy on mobile	—	☐	—	—	☐	—	☐
<b>Cross-tenant</b>							
Switch active company	—	—	—	—	—	—	☐

## Notes on specific roles

### Technician

Intentionally minimal on the web — technicians see a dashboard and their own tasks read-only. Everything productive happens in the mobile app.

### Mapper

Has both data-modeling authority (full CRUD on hierarchy, components, safety, schedules) and user-management authority within the company. This is deliberate: a mapper usually also sets up the team structure during an installation's initial commissioning.

### Supervisor

Read-mostly except for the two write privileges that define the role: **assign** and **approve/reject** tasks.

## Manager

Designed purely for consumption. No create/edit/delete anywhere. If you need a dashboard-only user who's allowed to click into a task to read its details, this is the role.

## Admin

The only role with the `settings.edit` permission. Acts as the tenant owner within a customer company.

## Viewer

The strictest read-only role. No mobile access at all.

## PegotecUser

The only role with `manage-companies` and the only role that can switch tenant context via the `X-Company-ID` header. Everything else looks like Admin.

## Multiple roles

---

A user can hold more than one role. Their effective permission set is the **union** of all assigned roles. There's no subtraction or priority ordering — more roles mean more access.

## Changing permissions per role

---

Admins can create custom roles with any combination of the 40+ underlying permissions on the **Roles** page in the web portal. The seven roles above are the built-in defaults, pre-seeded on installation.

## Related topics

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- [Roles and responsibilities](#)
- [User management](#)

# Task types

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Smart Maintenance Task Manager has five built-in task types. Each type defines a default set of form fields tailored to the work. Individual tasks can add or remove fields beyond the defaults.

## The five types

Type	Typical use	Default fields
<b>Lubrication</b>	Applying grease, oil, or other lubricants	Product, quantity, point condition, photo
<b>Mechanical</b>	Inspection, adjustment, cleaning	Measurements, condition rating, notes, photo
<b>Electrical</b>	Voltage, current, insulation and thermal checks	Voltage, current, insulation reading, thermal photo
<b>Production</b>	Output reading, run-hour capture	Output, run hours, anomaly flag
<b>Repair request</b>	Resolution of a reported fault	Failure confirmation, parts used, time spent, before/after photo

Every task type supports **safety procedure gating**, **threshold-bound numeric fields**, and **photo attachments**.

## Lubrication

---

### When to use

- Grease application at a specific grease point.
- Oil top-up on a gearbox.
- Replacing a sealed cartridge.
- Periodic re-lube cycles driven by run hours or calendar time.

Use **Mechanical** instead when the lubricant is incidental to a broader inspection or adjustment.

## Default fields

Field	Type	Notes
Product	Dropdown	From the master <b>Products</b> list. Filtered by compatibility when the component has a preferred product.
Quantity	Numeric	Unit attached from master data (ml, g, oz, l). Drives reorder reports.
Point condition	Dropdown	Good / Fair / Poor, or a custom enum.
Photo	Photo	One photo of the lubrication point post-application is typical.

## Reports that consume this type

- **Completion Report** — counts completed lubrication tasks vs scheduled.
- **Consumption Report** — aggregates quantity per product, useful for reorder forecasting.

## Mechanical

### When to use

- Periodic inspection routines.
- Adjustments, cleaning, minor replacements.
- Any routine work that isn't specifically lubrication, electrical, or production-metric capture.

Mechanical is the most commonly-used type and the most flexible — most custom fields you add during task design end up on Mechanical tasks.

### Default fields

Field	Type	Notes
Condition	Dropdown	Good / Fair / Poor (or a custom enum).
Observations	Free text	Notes about what you found.
Action taken	Free text	What you did about it.
Photo	Photo	Optional, usually recommended.

### Common **custom additions**:

- Numeric measurements (belt tension, bearing temperature, clearance).
- Yes / No checks (is the guard in place? Is the coolant level adequate?).
- Multi-select checklists for multi-step inspections.

## Reports that consume this type

- **Task Reporting** — raw execution log.
- **Task History** — historical drill-down.
- **Technician Comparison** — maintenance throughput per technician.

## Electrical

### When to use

- Voltage / current checks on motors, drives, switchgear.
- Insulation-resistance measurements (megger tests).
- Thermal imaging of panels, connections, bus bars.
- Any measurement that requires electrical PPE and lock-out / tag-out procedures.

#### **SAFETY**



Electrical tasks should always have a safety procedure attached. Without explicit acknowledgement, a technician can power-on-test without lock-out and get hurt.

### Default fields

Field	Type	Notes
Voltage	Numeric (volts)	Threshold-bound if configured.
Current	Numeric (amps)	Threshold-bound if configured.
Insulation reading	Numeric (MΩ)	Threshold-bound.
Thermal photo	Photo	Required for thermal imaging tasks.
Notes	Free text	Observations.

## Reports that consume this type

- **Task Reporting**.
- **OEE Report** — electrical failures correlate with downtime.

## Production

### When to use

- Capturing run-hour readings from equipment meters.

- Logging output counters (units produced, kilograms processed, metres of fabric).
- Periodic recording of production-relevant metrics that aren't maintenance per se but feed analytics.

Production tasks are less about fixing things and more about capturing numbers that drive OEE and scheduling decisions.

## Default fields

Field	Type	Notes
Output reading	Numeric	Units attached from master data.
Run hours	Numeric (hours)	Hour-meter reading. Often drives schedule triggers for run-hour-based tasks.
Anomaly flag	Yes / No	Quick escalation flag.
Notes	Free text	Optional.

## Reports that consume this type

- **OEE Report.**
- **Asset Availability.**
- **Yearly Report.**

## Repair request

---

### When to use

- Resolving a reported repair request.
- Corrective work after a shutdown.
- Follow-up on an anomaly flagged during another task.

Repair tasks usually have an originating **repair request** — the link between the original report and the resolution is tracked so you can follow incidents end to end.

## Default fields

Field	Type	Notes
Failure confirmation	Yes / No	Did you confirm the reported failure?
Failure type	Dropdown	From master <b>Repair request types</b> .
Parts used	Multi-select	From <b>Products / Tools</b> master data.
Time spent	Numeric (hours)	Drives cost reports.
Before photo	Photo	State when you arrived.
After photo	Photo	State after repair.
Notes	Free text	What you did, what you'd recommend next.

## Reports that consume this type

- **Repair Request Report** — resolution time, cost, recurrence.
- **Task Reporting**.

## Task type common behaviours

### Safety procedure gating

Any task type can have a **safety procedure** attached. When a safety procedure is present, the technician must acknowledge each safety measure before the form becomes available. See [Safety procedures \(web portal\)](#).

### Threshold highlighting

Numeric fields bound to a **threshold** in master data highlight when the entered value is out of range:

- **Green background** — within range.
- **Orange background** — at edge of range.
- **Red background** — out of range.

Highlighting is advisory — the form still submits. It's a visual cue for both the technician and the approving Supervisor. See [Master data](#).

### Photo attachments

All task types support photos. Default limit: 10 photos per task, 10 MB per photo, JPEG or PNG. See [Photos and attachments](#).

## Recurring schedules

Any task can be attached to a recurring schedule (daily / weekly / monthly / custom pattern). The schedule generates task instances automatically at the right time. See [Scheduling](#).

## Offline execution

All task types work offline. The mobile app caches the full form definition and renders it without a server round-trip. See [Working offline](#).

## Choosing a type

Rough decision tree:

```

Is it lubrication?
├── Yes → Lubrication
└── No → Is it measuring voltage / current / insulation / thermal?
    ├── Yes → Electrical
    └── No → Is it recording production output or run hours?
        ├── Yes → Production
        └── No → Is it resolving a reported fault?
            ├── Yes → Repair request
            └── No → Mechanical
  
```

When in doubt, choose **Mechanical** — it's the most flexible and the least likely to mis-categorise.

## Custom fields

Beyond the defaults, any task can add custom fields. Common additions:

- Extra numeric measurements with or without thresholds.
- Extra dropdowns (pick from a custom list).
- Yes / No checks.
- Multi-select checklists.
- Additional photo fields (named, e.g. "Photo of seal before", "Photo of seal after").

Custom fields are defined once per task, not per task type.

## Related topics

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- [Executing a task \(mobile\)](#) — the technician's view of these fields.
- [Master data](#) — thresholds, units, products, tools.
- [Components](#) — linking tasks to reusable component types.
- [Scheduling](#) — generating recurring instances.
- [Reports](#) — where task data goes.

# Configuration options

Cross-cutting decisions an Admin or Mapper makes when setting up and tuning the platform. Each entry frames the decision, summarises the trade-offs, and points to the detailed page for step-by-step instructions.

## WHO SHOULD READ THIS

Admins and Mappers during initial setup, and quarterly when reviewing configuration. Technicians, Supervisors, Managers, and Viewers can skim for context.

## How to use this page

This is a **decision map**, not a how-to. Each section names a choice, tells you the practical differences between the options, and suggests a default for most installations. The linked detail pages tell you *how* to execute the choice once you've made it.

## Physical tag strategy: NFC vs QR codes

**The choice:** how do technicians open a task point on mobile?

Option	When to choose
<b>NFC tags</b>	Default. Fastest scan. Works even with the camera blocked. ~\$0.50 per tag, durable with the right enclosure.
<b>QR-code labels</b>	Metal-heavy areas where NFC detunes, sites without NFC hardware on every phone, budget-constrained rollouts (printing is effectively free).
<b>Both</b>	Mixed plants — NFC in benign areas, QR on engine blocks / wash-down zones. Most large sites end up here.

**Default:** NFC with on-metal variants for ferrous surfaces. Add QR labels only for the 10–20% of spots where NFC proves unreliable.

See: [NFC tags \(web portal\)](#) · [Writing NFC tags \(mobile\)](#) · [Scanning barcodes \(mobile\)](#).

## How work gets generated: recurring vs ad-hoc

**The choice:** where does the next task come from?

Option	When to choose
<b>Recurring schedules</b>	Default for preventive maintenance — regular, predictable, time- or run-hour-based. Set once, forget.
<b>Run-hour-driven</b>	Equipment where wear is a function of usage, not wall-clock time. Needs Production tasks that capture run hours.
<b>Ad-hoc</b>	One-off work: commissioning, decommissioning, one-time inspections.
<b>Reactive (via repair requests)</b>	Issues discovered in the field that trigger a Repair task after triage.

**Default: recurring** for ~80% of tasks, **ad-hoc** for commissioning, **repair-request-driven** for breakdowns. Run-hour schedules only where you have reliable Production-task capture of run hours.

See: [Scheduling \(web portal\)](#) · [Repair requests \(mobile\)](#).

## Safety-gating: which tasks need a procedure?

**The choice:** which tasks require the technician to acknowledge safety measures before the form loads?

Situation	Choice
<b>Always-safe routine inspection</b> (visual check, run-hour read)	No safety procedure. Adding one here becomes theatre; it gets tapped through.
<b>Electrical work, hot work, confined space, working at height, chemical handling</b>	Always attach a safety procedure. Keep it specific (3–8 steps).
<b>General maintenance on potentially-energised equipment</b>	Attach a baseline procedure covering PPE + LOTO verification.
<b>Catch-all "safety everywhere"</b>	Anti-pattern. Procedures lose meaning when every task has one.

**Default:** task-specific safety procedures on the ~20% of tasks where the risk justifies it; nothing on the other 80%.

See: [Safety procedures \(web portal\)](#).

## Threshold strictness: tight vs loose values

**The choice:** how aggressive are your min/max values on numeric fields?

Option	Effect
<b>Tight (narrow range)</b>	Out-of-range highlights appear often. Supervisors see more "out-of-spec" submissions. Drives diagnostic attention, but also normalises orange / red fields (alert fatigue).
<b>Loose (wide range)</b>	Fewer alerts. Real outliers stand out clearly when they appear. Risk: an early warning gets missed because the threshold was too forgiving.
<b>Staged (advisory + warning + critical)</b>	Separate thresholds for "worth noting" vs "needs action" vs "line-stop". Supervisors can filter to just the red ones. Slightly more setup; much better signal.

**Default: staged** for critical measurements (bearing temperature, pressure, voltage), **loose** for routine indicators (general condition), **tight** only after  $\geq 3$  months of real data shows a stable distribution.

See: [Master data > Thresholds](#).

## Where to define tasks: component-level vs asset-level

**The choice:** define tasks on the component type (shared) or on each asset individually (per-asset)?

Option	When to choose
<b>Component-level</b> (default)	20 similar pumps with the same maintenance profile. Define once, every asset inherits. Single edit updates all.
<b>Asset-level</b>	One-off equipment, prototypes, assets where maintenance diverges from the generic component.
<b>Hybrid</b>	Component-level default task set + asset-level overrides for quirks. Best of both for mature plants.

**Default: component-level** whenever the asset class has  $\geq 3$  similar instances. Asset-level only for unique or outlier equipment.

See: [Components \(web portal\)](#) · [Asset hierarchy](#).

## Shutdown classification: planned vs unplanned

**The choice:** how do you categorise shutdowns for OEE reporting?

Option	Effect on OEE
<b>Planned</b> (maintenance window, scheduled change-over)	Excluded from unplanned-downtime; availability metric is unaffected.
<b>Unplanned</b> (equipment failure, safety stop, material shortage)	Counts against availability. Drives the main OEE signal.
<b>Force-majeure</b> (utility outage, external supply failure)	Separately categorised; some installations exclude from operational metrics.

**Default:** log planned shutdowns **before** they happen (on the web portal). Unplanned shutdowns reported from mobile default to **Unplanned** unless the reporting technician knows better.

See: [Shutdowns \(web portal\)](#) · [Reporting a shutdown \(mobile\)](#).

## Photo policy: required vs optional

**The choice:** make photos a required field on certain task types?

Option	Effect
<b>Required</b>	Higher-quality submissions. Slower execution — technician can't leave the field empty. Some environments (confined space, low light) make this impractical.
<b>Optional</b>	Faster execution. Lower proof-of-work for audit. Supervisors can't always verify claimed condition.
<b>Required on Repair, Optional elsewhere</b>	Good balance. The tasks where a photo really matters get one; routine tasks stay fast.

**Default:** **required** on Repair tasks, shutdowns, and any task where a "before" or "after" condition shot is diagnostically useful. **Optional** on lubrication and routine inspection.

See: [Photos and attachments \(mobile\)](#) · [Task types](#).

## Notification tuning: breadth vs focus

**The choice:** how many notification categories do you enable by default for new users?

Option	Effect
<b>Everything on</b> (platform default)	New users get every category via push + email. Surprising volume; most users tune down within a week.
<b>Narrow default</b> (company-wide)	Only critical categories on by default (assigned, overdue, repair updates). Less noise; users opt into the rest.
<b>Role-specific defaults</b>	Technicians on for task lifecycle. Supervisors on for submissions and repairs. Managers on for weekly report only.

**Default:** **role-specific** where your installation supports it. Otherwise **narrow default** — quiet opt-in beats loud opt-out.

See: [Notifications \(web portal\)](#) · [Notifications \(mobile\)](#) · [Notifications reference](#).

## User scoping: company-wide vs production-site

**The choice:** should a user see data from the whole company, or only from specific production sites?

Option	When to choose
<b>Company-wide</b> (default)	Single-site companies. Small multi-site setups where everyone can see everything.
<b>Production-site scoped</b>	Multi-site companies where sites operate semi-independently. Technicians see only their plant's tasks.
<b>Mixed</b>	Most users scoped to their site; Admins and Managers company-wide.

**Default:** company-wide for everyone initially. Add site-scoping only when complaints arise about information overload or segregation requirements.

See: [User management \(web portal\)](#) · [Permissions matrix](#).

## Role assignment: single-role vs multi-role

**The choice:** does a user have one role or several?

Situation	Choice
<b>Pure function</b> (a technician who only executes tasks)	Single role: Technician.
<b>Working supervisor</b> (executes tasks AND assigns others' work)	Multi-role: Technician + Supervisor.
<b>Mapper who also admin</b>	Multi-role: Mapper + Admin.
<b>Viewer with occasional reporting access</b>	Viewer + Manager (Manager adds report export).

Multi-role users get the **union** of all assigned permissions. Nothing subtracts.

**Default:** one role per user for ~70% of your team. Multi-role only where responsibilities genuinely combine.

See: [User management \(web portal\)](#) · [Permissions matrix](#).

## Bulk operations: CSV import vs manual entry

**The choice:** import users, hierarchy, or master data from CSV, or enter each manually?

Option	When to choose
Manual entry	Under 20 items. Already signed in and adding incrementally. Demonstrating the workflow during training.
CSV import	Bulk onboarding, migration from another system, seeding a new tenant. Up to 5,000 rows per upload.
Mixed	Bulk-seed the initial set via CSV, then maintain incrementally via manual entry. Most real installations do this.

**Default:** manual for ongoing changes, CSV for any one-shot load over ~20 items.

See: [User management > Import users from CSV](#) · [Asset hierarchy > Bulk import via CSV](#) · [File formats](#).

## Export format: CSV, PDF, or XLSX

**The choice:** which format for sharing report data?

Format	Best for
CSV	BI pipelines, Excel / Google Sheets analysis, anything programmatic. Raw values, no formatting.
PDF	Print-ready, share-to-stakeholder, audit packs. Includes filters applied and company logo.
XLSX	Sharing with colleagues who will sort / filter / annotate. Coloured status cells, frozen panes.

**Default:** XLSX for colleagues, CSV for integrations, PDF for audit / executive.

See: [Reports > Exporting](#) · [File formats](#).

## Translation strategy: English-first vs multi-language

**The choice:** rely on English or push translated content to every user?

Option	Effect
English-only	Simpler. Works for small teams with shared language.
Auto-default to user's browser language (platform default)	Users see their preferred language when supported; English fallback otherwise.
Forced locale per user	Admin sets each user's language explicitly. Only useful when users don't know how to change it themselves.

**Default:** leave it on browser-default. Users who want a specific language set it in their profile (**Profile → Language**).

See: [Language and locale](#) · [Supported languages](#).

## Where to turn a setting on or off

---

Most configuration is in one of three places:

- **Company-wide settings** — Admins configure in **Settings**. Applies to every user in the company.
- **User profile** — each user configures in **Profile**. Applies to them only.
- **Master data** — Admins configure in **Master data**. Referenced by tasks and components.

For feature toggles that are company-wide but optional, see [Feature flags \(web portal\)](#).

## Review cadence

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A healthy installation is re-visited:

- **Weekly** — approval queue, open shutdowns, open repair requests. (Operational.)
- **Monthly** — notification tuning, escalation effectiveness, cross-reference of metrics. (Admin / Manager.)
- **Quarterly** — threshold values against actual data, master-data cleanup, user roster reconciliation. (Admin.)
- **Annually** — physical tag audit (NFC skip report), safety-procedure content review, role audit. (Mapper + Admin + Safety Officer.)

## Related topics

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- [Admin handbook](#)
- [Mapper handbook](#)
- [Permissions matrix](#)
- [Feature flags](#)
- [Master data](#)

# Supported languages

Smart Maintenance Task Manager ships in 14 languages. Each user can pick their preferred language independently.

Code	Language	Native name	Script	RTL
en	English	English	Latin	—
de	German	Deutsch	Latin	—
es	Spanish	Español	Latin	—
fr	French	Français	Latin	—
it	Italian	Italiano	Latin	—
nl	Dutch	Nederlands	Latin	—
pt	Portuguese	Português	Latin	—
ro	Romanian	Română	Latin	—
tr	Turkish	Türkçe	Latin	—
ar	Arabic	العربية	Arabic	☐
bn	Bengali	বাংলা	Bengali	—
id	Indonesian	Bahasa Indonesia	Latin	—
th	Thai	ไทย	Thai	—
zh	Chinese	中文	Han	—

## Coverage

English is the baseline — 100% by definition. Other languages typically sit at  $\geq 95\%$  coverage. Individual strings fall back to English when not yet translated.

Pegotec staff monitor coverage centrally and roll out updates to each installation automatically.

## Right-to-left layout

Arabic renders right-to-left automatically on both the web portal and mobile app. All layouts (forms, tables, navigation, buttons) mirror correctly. Numeric input fields stay left-to-right as per Arabic convention.

## Changing languages

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- Web portal: **Profile** → **Language**.
- Mobile app: **Settings** → **Language**.

Language change reloads the UI in the chosen language. Data (asset names, user names, comments) is not translated — only the platform's own UI strings.

## Related topics

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- [Language and locale](#)

# System requirements

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Supported platforms, browsers, and hardware specs for Smart Maintenance Task Manager.

## Web portal

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### Browsers

Browser	Minimum version
Chrome	Current and previous major
Edge	Current and previous major
Firefox	Current and previous major
Safari	Current and previous major

Older browsers may work but aren't tested or supported.

### Hardware

- Minimum screen: 1280 × 720.
- Recommended: 1440 × 900 or better for dense tables.
- Stable broadband (5 Mbps+).
- Modern CPU — the portal renders heavy data grids and real-time WebSocket updates.

## Mobile app

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### Platforms

- **iOS:** 15 and later.
- **Android:** 7.0 (Nougat) / API 24 and later.

### Hardware

- 2 GB RAM minimum (4 GB recommended).
- 1 GB free storage for app + cache.
- Camera (required for photo capture and barcode scanning).

- NFC hardware (optional — required only if you scan or write NFC tags).
- Fingerprint reader or Face ID (optional — biometric unlock falls back to PIN).

## Network

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- HTTPS to the installation's API URL.
- WebSocket support for real-time updates on web and mobile.
- No inbound ports required — all connections are outbound from the client.
- Push notifications work out of the box on any device with normal internet access.

## Related topics

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- [The apps](#)
- [Installing the mobile app](#)

# Notifications reference

Every notification the system can send, and who receives it.

## Task lifecycle

Notification	Recipient	Channel	Trigger
Task assigned	The assigned technician	Push + in-app	A Supervisor or schedule assigns a task.
Task due soon	The assigned technician	Push	One hour before the task's due time.
Task overdue (to technician)	The assigned technician	Push + in-app	Sent when the task passes its due time plus configured grace period.
Task escalation (Tier 1)	The technician's Supervisor	Push + in-app + optional email	Fires only if <b>Automatic Escalation</b> is enabled in <a href="#">Company Setting</a> . Sent when a task remains overdue for the configured <b>Tier 1 threshold</b> (default <b>24 hours</b> ).
Task escalation (Tier 2)	Admins and Managers	Push + in-app + optional email	Fires only if Automatic Escalation is enabled. Sent when a task remains overdue for <b>Tier 2 threshold</b> beyond Tier 1 (default <b>48 hours</b> ).
Task submitted for approval	Supervisors (and Admins) in the company	Push + in-app	Technician submits a task.
Task approved	The executing technician	Push + in-app	Supervisor approves.
Task rejected	The executing technician	Push + in-app	Supervisor rejects; includes reason.

## Two-tier escalation explained

**Automatic Escalation is an optional feature.** It's disabled by default. An Admin turns it on in [Company Setting → Task Escalation](#).

When enabled, escalation has two tiers:

1. **Tier 1** — the technician's Supervisor is notified when a task has been overdue for **Tier 1 hours** (default **24 hours**). This is the "supervisor-aware" nudge.
2. **Tier 2** — Admins and Managers are notified when the task remains overdue for **Tier 2 hours** beyond Tier 1 (default **48 hours**). This is the "senior attention required" escalation.

Both tier thresholds are **hours**, configurable per-company in Company Setting. If a task completes between tiers, the later tier doesn't fire for it.

If escalation is **off**, only the assigned technician's own overdue notification is sent — no fan-out to Supervisors or Admins. Many installations run without escalation because the Supervisor already watches the Dashboard / [Approvals](#) queue manually.

**Email delivery** is a separate toggle — "Send Escalation Emails" in Company Setting. In-app notifications fire regardless when escalation is enabled; emails fire only if the toggle is on too.

All timing is relative to the task's due time + grace period, in the company's configured timezone.

## Repair requests

Notification	Recipient	Channel	Trigger
New repair request	Supervisors + Admins	Push + in-app	Technician submits a repair request.
Repair request updated	The submitting technician	Push + in-app	Supervisor acknowledges / escalates / resolves.

## Shutdowns

Notification	Recipient	Channel	Trigger
New shutdown reported	Supervisors + Admins	Push + in-app	Technician reports a shutdown.
Shutdown resolved	The reporting technician	Push + in-app	Supervisor marks the shutdown resolved.

## Administrative

Notification	Recipient	Channel	Trigger
Account created	The new user	Email	Admin creates a new user.
Password reset requested	The requesting user	Email	User clicks "forgot password".
Role changed	The affected user	Email + in-app	Admin changes the user's role.
Weekly report	Admins + Managers	Email	Every Monday at 07:00 local time.

## Channels

- **Push** — system push notifications to the mobile app.
- **In-app** — the notification bell on the web portal and the notifications screen on mobile.
- **Email** — from `noreply@sm-tm.app`.

## Disabling notifications

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- **Per-channel:** profile → Notifications. You can disable push, email, or in-app independently.
- **At OS level** (push only): system settings → app notifications → Smart Maintenance Task Manager → off.

## Related topics








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- [Notifications \(web portal\)](#)
- [Notifications \(mobile\)](#)
- [Profile and settings \(web portal\)](#)





# Icons and badges

The meaning of status icons, priority colours, and badges used across the platform.





## Task status

Badge	Status	Meaning
	On time	Due today or later.
	Due soon	Less than 1 hour to due time.
	Overdue	Past due time.
	Draft	Started but not submitted.
	Pending approval	Submitted, awaiting Supervisor.
	Completed	Approved.
	Rejected	Rejected, awaiting rework.

## Priority

Badge	Priority	When used
	Low	Routine, non-urgent.
	Medium	Default for most tasks.
	High	Impacts production or safety indirectly.
	Critical	Immediate attention required — safety or line-stop.

## Sync status (mobile)

Icon	Meaning
	Online, synced.
	Online, syncing now.
	Offline with pending uploads.
	Sync failed — tap for details.

## Threshold indicators

When a numeric field is bound to a threshold in master data:

- **Green background:** value is within the configured range.
- **Orange background:** value is at the edge of the range (warning).
- **Red background:** value is outside the range (violation).

## NFC / barcode

Icon	Meaning
□	NFC tag present on this asset.
□	Barcode label present on this asset.
□	NFC tag registered but not yet written.

## Role indicators

Some pages label a user's role with a coloured chip:

Chip	Role
□	Technician
□	Mapper
□	Supervisor
□	Manager
□	Admin
◦	Viewer
•	PegotecUser

## Related topics

- [Navigating the portal](#)
- [Task types](#)
- [Permissions matrix](#)

# File formats

---

Supported file formats for photos, imports, and exports.

## Photos

Format	Where	Max size
JPEG	Task photos, repair requests, shutdowns, profile avatar	10 MB
PNG	Task photos, repair requests, shutdowns, profile avatar	10 MB

- Up to 10 photos per task / repair / shutdown.
- Client-side compression runs on-device before upload.
- Server generates 3 thumbnail sizes (small, medium, full).
- HEIC from iOS is converted to JPEG automatically on upload.

## CSV imports

---

Supported on the web portal for:

- Users (name, email, role, company).
- Asset hierarchy (line, section, asset, task point).
- Master data (thresholds, units, products, tools).

Expected encoding: **UTF-8 with or without BOM**. Expected delimiter: **comma**. First row must be the header.

Row limit per upload: 10,000.

## CSV exports

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Every report supports CSV export. Encoding is UTF-8, delimiter is comma, line terminator is `\n`.

## PDF exports

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Reports support a printable PDF export powered by server-side rendering.

## JSON

---

- API requests and responses are JSON.
- Core translation bundles are JSON.
- No user-facing JSON import in the web portal.

## NFC tag format

---

NFC tags are written in NDEF format with a single text record containing:



NFC\_<TYPE>\_<id>

where <TYPE> is the asset type (for example, `TASKPOINT`) and <id> is the database ID of the linked record.

## Barcode formats

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The mobile app decodes:

- QR code.
- Code 128.
- Code 39.
- EAN-13.
- UPC-A.
- Data Matrix.

## Related topics

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- [Photos and attachments \(mobile\)](#)
- [Asset hierarchy \(web portal\)](#)
- [Reports \(web portal\)](#)

# Troubleshooting

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# Troubleshooting

---

Something isn't working? Start here.

## Common problems

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- [I can't log in](#)
- [Sync is stuck or failing](#)
- [NFC is not working](#)
- [The app is crashing](#)
- [Tasks aren't showing](#)
- [Photo upload is failing](#)
- [Language isn't updating](#)
- [Performance is slow](#)

## Still stuck?

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See [Contact support](#) for how to escalate.

## Before you contact support

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Gather:

- Your user email / username.
- Your company name.
- The app and version (web portal version appears in the footer; mobile version in Settings → About).
- A description of what you were trying to do and what happened instead.
- A screenshot or screen recording if possible.
- Approximate time (with timezone) the problem occurred.

Having these ready lets support diagnose faster.

# I can't log in

---

Can't sign in to the web portal or mobile app.

## Try first

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1. **Double-check the URL.** Production, staging, and development each have different URLs. Your Admin has the correct one.
2. **Caps lock.** Passwords are case-sensitive.
3. **Username vs email.** You can log in with either — try the other.
4. **Reset the password.** Click **Forgot password?** on the login screen and wait for the email from `noreply@sm-tm.app`. Check your spam folder.

## The reset email never arrives

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- Check spam / junk.
- Check the email address your Admin has on your account. Ask them to confirm it's current.
- If email is delayed (some corporate mail gateways buffer), wait up to 15 minutes.

## "Invalid credentials" but the password is right

---

- Your account may have been deactivated. Ask your Admin to check in **Users**.
- You may be on the wrong URL — staging and production have separate user databases.
- The account may have been locked by too many failed attempts — see **Account locked** below.

## Account locked: "Too many failed attempts"

---

After **10 consecutive failed sign-in attempts**, the platform locks the account for **2 hours** as an anti-brute-force measure.

### What you'll see:

| Too many failed attempts. Try again in 2 hours, or reset your password.

### What to do:

- **Wait it out** — after 2 hours the lock releases automatically. No action needed.

- **Reset your password** if you can — the reset flow (via **Forgot password?**) bypasses the lock. Set a new password and sign in with it.
- **Contact your Admin** if the reset email isn't arriving and you can't wait 2 hours — the Admin can trigger a password reset on your behalf.

The lock applies per **user account**, not per device or IP — locking yourself out on the web portal also locks the mobile app for the same 2 hours.

#### **PASSWORD MANAGERS HELP**

Most lock-outs come from typo'ing a password ten times. Using a password manager (1Password, Bitwarden, built-in browser autofill) eliminates the problem entirely.

## **Mobile app: "Couldn't reach the server"**

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- Confirm the API URL in **Settings**. If it's wrong, you need to re-pair. See [Pairing and setup](#).
- Check that your device has a network connection. Open a browser and load any page.
- If you're on corporate Wi-Fi, the firewall may block the API URL. Switch to mobile data to test.

## **Still stuck**

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See [Contact support](#).

## **Related topics**

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- [Your first login](#)
- [Pairing and setup \(mobile\)](#)

# Sync is stuck or failing

---

The **Pending uploads** badge on the mobile app won't clear, or the web portal shows stale data.

## On mobile

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### Try first

1. **Pull to refresh** on the Dashboard.
2. Open **Settings** → **Force sync**.
3. Confirm the Wi-Fi or mobile signal is stable. A weak signal makes background uploads fail silently.
4. Toggle airplane mode off then on.
5. Restart the app.

### If a specific task won't upload

1. Open the task from **Tasks** → **Drafts**.
2. Check for validation errors (red asterisks).
3. If the task looks complete, the server may have rejected it — check with your Supervisor to see if the task was deleted or reassigned.

### Photos won't upload

See [Photo upload is failing](#).

### "Please update the app to continue" prompt during sync

Occasionally — usually after a platform release — sync will pause with a prompt asking you to update the app. This happens when the server has rolled out a schema change that the older app version can't render correctly (a new task-type field, a restructured response format).

What to do:

1. Don't factory-reset — your drafts and pending uploads are safe.
2. Open the App Store / Play Store.
3. Install the update for **Smart Maintenance Task Manager**.
4. Reopen the app.

5. Sync resumes automatically; queued items upload normally.

If the prompt keeps appearing after updating, force-quit the app and reopen — app-store cached metadata can lag a few minutes.

## Still stuck

- Re-pair the app. **Settings** → **Factory reset** → **Confirm**. This clears the local cache; you lose any drafts that haven't synced. Contact your Supervisor first if that's a concern.
- [Contact support](#).

## On the web portal

---

### Try first

1. Refresh the page (Cmd / Ctrl + R).
2. Check the network indicator in the header — a red dot means the WebSocket connection dropped.
3. Sign out and sign back in.

### "Can't connect to realtime"

This is the real-time connection. Reasons it fails:

- Corporate firewall blocking WebSocket upgrades.
- Ad blockers or privacy extensions interfering.
- Temporary server-side issue.

The portal keeps working without the WebSocket, but live updates won't arrive until you refresh.

## Related topics

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- [Working offline](#)
- [Sync and connectivity](#)

# NFC is not working

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You hold the phone to a tag and nothing happens.

## Try first

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1. **NFC enabled at OS level.** Check system settings: Android → Settings → Connected devices → NFC. iOS has NFC permanently on but it's app-gated.
2. **Phone orientation.** NFC antennas sit in different places on different phones:
  - Most Android phones: upper back.
  - iPhones: top edge near the notch.Try the phone from different angles with the tag.
3. **Phone case.** Some thick cases block NFC. Try without the case.
4. **Tap and hold, don't wave.** Hold for 1–2 seconds.

## The tag is recognised but no task point opens

---

- The tag may be blank (NFC\_\_ format not yet written). A Mapper needs to write it.
- The tag may point to a task point that was deleted. Ask your Mapper to re-write or deactivate it.

## "NFC skip report" keeps incrementing

---

Every failed scan is logged to the skip report, visible to Supervisors. If a specific technician or asset has a high skip count, it usually points to:

- A damaged or poorly placed tag.
- A user holding the phone incorrectly.

See [NFC tags \(web portal\)](#).

## Device has no NFC at all

---

Not every device has NFC hardware. Check the phone's spec sheet.

- If there's no NFC: use barcode scanning instead if the asset has a printed code, or ask your Supervisor for a device swap.

- See [Scanning barcodes](#).

## Related topics

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- [Scanning NFC tags](#)
- [Writing NFC tags](#)
- [NFC tags \(web portal\)](#)

# The app is crashing

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The mobile app closes unexpectedly or fails to launch.

## Try first

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1. **Restart the device.** Fixes a surprising range of issues.
2. **Update the app.** Open the App Store / Play Store and check for updates.
3. **Free up storage.** If the device is full, the app may fail to open the local database.
4. **Reinstall.** Uninstall the app, reinstall, and re-pair. You lose local drafts.

## The app crashes immediately on open

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Likely causes:

- Corrupt local database.
- OS upgrade broke a native dependency.

## Fix

1. Uninstall the app.
2. Reinstall from the App Store / Play Store.
3. Re-pair using the QR code from your Admin. See [Pairing and setup](#).

## Crashes during task execution

---

Report to your Admin with:

- The exact task you were executing.
- The last action before the crash (tapping a button, opening a photo).
- Your device model and OS version.
- The app version (visible in Settings → About).

The app sends crash reports automatically (tagged with your user ID and role) — support can correlate your report with the crash data.

## Related topics

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- [Installing the app](#)
- [Contact support](#)

# Tasks aren't showing

---

You expect to see tasks in your list but the list is empty or incomplete.

## Try first

---

1. **Pull to refresh** on mobile, or refresh the page on web.
2. Confirm you're signed in as the right user (avatar → Profile).
3. Check the filters — a leftover filter from a previous session may be hiding tasks.
4. Confirm the date range — if you're looking at a past date, today's tasks won't show.

## On mobile

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- Tasks assigned to other technicians are never visible to you.
- If your device hasn't synced today, the list may be stale. Open **Settings → Force sync**.
- If **Pending uploads > 0**, your device isn't syncing. See [Sync is stuck or failing](#).

## On web

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- Your role determines what tasks you can see. If you're a **Viewer** or **Manager**, you see all tasks read-only but can't interact with them.
- If you're a **Supervisor** or **Admin**, make sure you're looking at the right site / line filter in the **Assignments** page.

## Tasks I just assigned aren't reaching the technician

---

- The technician's device may be offline. Assignments reach them on the next sync.
- The technician may have a filter applied that's hiding the new task.
- Ask them to pull-to-refresh. If that doesn't work, re-check the assignment on your side — the drop may have missed.

## Scheduled tasks aren't being generated

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- Check **Scheduling** on the web portal. A schedule can be accidentally deactivated.

- Confirm the schedule's recurrence rule covers today.
- Check with an Admin — scheduler jobs run every few minutes; a system outage can delay them.

## Related topics

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- [Sync is stuck or failing](#)
- [Assigning tasks](#)
- [Scheduling](#)

# Photo upload is failing

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Photos on your device won't reach the server.

## Try first

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1. Check the **Pending uploads** badge on the Dashboard.
2. Pull to refresh.
3. Confirm connectivity (open a browser to any page).
4. Open **Settings** → **Force sync**.

## "Photo too large"

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The app compresses photos automatically, but extremely large raw images can exceed the 10 MB limit:

- Check the photo's size in the gallery.
- Retake the photo at a lower resolution if your camera has an option.

## "Unsupported format"

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Only JPEG and PNG are accepted. iOS HEIC photos are converted automatically; if conversion fails:

- Open iOS Settings → Camera → Formats → **Most Compatible** (this makes the camera save JPEG directly).

## Photo stuck at "Uploading..."

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- Tap the photo.
- Tap **Retry**.
- If it still fails, tap **Remove** and retake.

## Many photos failing at once

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- Indicates a network or server-side problem rather than a per-photo issue.

- Check [Sync is stuck or failing](#).
- Report to your Admin if other users are seeing the same thing — may be an installation-wide incident.

## Photos upload but don't appear on the web portal

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- Refresh the web portal.
- Server-side thumbnail generation runs asynchronously and may take a few seconds.
- If a photo still doesn't appear after a minute, contact your Admin.

## Related topics

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- [Photos and attachments](#)
- [Sync is stuck or failing](#)
- [File formats](#)

# Language isn't updating

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You changed your language in the profile but the interface is still in the old language, or some strings are still in English.

## Try first

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1. **Fully reload.** Web portal: Cmd / Ctrl + Shift + R. Mobile: force-close the app and reopen it.
2. **Confirm the save stuck.** Profile → Language — the dropdown should show your chosen language.
3. **Sign out and back in.** Forces a fresh language bundle download.

## Some strings are still in English

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That's expected. Translation coverage is typically  $\geq 95\%$  but not 100% for every language. Untranslated strings fall back to English rather than showing empty space.

If a specific string should be translated and isn't:

- Tell your Admin. They can raise it via Pegotec support.
- Pegotec staff: add / edit the translation in the central translation database.

## My language isn't listed

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Only the 14 supported languages appear in the dropdown. See [Supported languages](#). If you need a new language added, that's a significant piece of work — raise it via your Admin.

## Arabic isn't rendering right-to-left

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- Force-close and reopen the app.
- If the problem persists, the device's OS locale may be overriding — check system settings.

## Related topics

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- [Language and locale](#)
- [Supported languages](#)

# Performance is slow

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Pages take a long time to load, or the app feels sluggish.

## Web portal is slow

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### Try first

1. Refresh the page.
2. Clear browser cache (Cmd / Ctrl + Shift + R).
3. Try a different browser to isolate.
4. Check your internet connection — run a speed test.

## Large reports take minutes to load

Some reports (OEE, yearly, cross-site) query a lot of data. Narrow the date range or filter by a single site to speed them up.

## The dashboard real-time updates are lagging

- The real-time service may be under load.
- Corporate firewalls / proxies can add latency to WebSocket frames.
- If you only need a snapshot, refresh the page instead of waiting for live updates.

## Mobile app is slow

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### Try first

1. Close other apps.
2. Restart the device.
3. Check free storage — under 500 MB free causes SQLite to slow down.
4. Update the app to the latest version.

## Task list takes a long time to open

- If your company has thousands of assigned tasks, the initial load is slower. The app paginates internally to keep scrolling smooth.

- Apply a filter to narrow the list if you only need today's work.

## Photo capture is slow

- Older devices compress photos on the CPU, which takes seconds per photo. Expected on older hardware.
- Update to the latest app version — compression tuning changes occasionally.

## Related topics

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- [System requirements](#)
- [Contact support](#)

# Contact support

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If the troubleshooting guides didn't resolve your issue, escalate to support.

## Who to contact first

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Always start inside your organisation:

1. **Technician / Mapper / Manager / Viewer:** contact your **Supervisor** or **Admin**. Many issues are account- or configuration-related and can be fixed locally.
2. **Supervisor:** contact your **Admin**.
3. **Admin:** contact **Pegotec support** by email (see below).

## Pegotec support

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- **Email:** [info@pegotec.net](mailto:info@pegotec.net)
- **Hours:** business hours only.
- **Emergencies:** the same email — there is no separate after-hours or hotline. Mark the subject as **URGENT** and describe the production impact so the team can prioritise on the next business morning.
- **Website:** [sm-tm.app](https://sm-tm.app) — product information.

No portal, ticket system, or Slack / Teams channel for customer support — email is the single channel.

## What happens after you email

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1. Your email reaches the Pegotec team inbox.
2. Someone on the team picks it up during the next business-hours window.
3. You receive a reply by email. Follow-ups happen in the same email thread.
4. If the issue needs cross-team work, Pegotec coordinates internally and keeps you updated by email.

Keep the original email thread alive — replying in-thread is much faster than starting a new email for the same issue.

## What to include

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A good support request includes:

- **Who:** your email, username, company, role.
- **Where:** production / staging / development. The URL you're signed in to.
- **What you were trying to do.** One sentence.
- **What happened instead.** One sentence.
- **Steps to reproduce.** Numbered if possible.
- **When.** Approximate time and timezone.
- **Screenshots or screen recording.** Include if possible — they speed diagnosis dramatically.
- **App and version.** Web portal footer shows the version. Mobile: Settings → About.
- **Device details.** If mobile: device model, OS version.

## Reporting a bug

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If you believe you've found a bug (rather than a user-specific issue):

1. Capture a screenshot or recording.
2. Note the exact steps to reproduce.
3. Include the URL from the browser address bar (for web issues).
4. Email as above, mentioning "Bug report" in the subject.

## Requesting new features

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Feature requests go to the same email. Describe:

- What problem you're trying to solve.
- What you'd do with the new feature.
- How often this comes up in your work.

"What problem you're trying to solve" is the most important part. Pegotec frequently builds something slightly different from the original request because the underlying problem is better addressed a different way.

## Related topics

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- [Troubleshooting](#)