



Cumulus Control Center Guide: Remote Workflow Execution

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OVERVIEW

Control Center supports remote execution of workflow operations directly from the browser, without requiring a mobile device running CMA. This allows supervisors, QC inspectors, QA reviewers, and other authorized users to complete operations – including inspections, confirmations, and sign-offs – from their desktop while viewing the full entity record, specifications, and history in Control Center.

Remote execution follows the same workflow rules as CMA. Operations appear based on the user's group membership and the entity's current conditional state. The key difference is that the user interacts with the workflow through the entity detail page in Control Center rather than through CMA on a mobile device.

This guide covers the requirements for remote workflow execution, how to access and execute operations in Control Center, and the additional rules that apply to Remote QC/QA sign-off.

REQUIREMENTS

For a workflow operation to appear and be executable in Control Center, two conditions must both be met:

1. Group Membership

The user must belong to the specific group tied to the operation. Access is determined by group membership itself – not by the permissions assigned to the group. This means that even a Super User will not see operations restricted to the Fitter group unless they are also a member of the Fitter group. Being a Super User does not override the group requirement.

For example, if a tightening operation is assigned to the Fitter user group, only users who are members of the Fitter group will see that operation in Control Center. A QC inspector who belongs to the QC group but not the Fitter group will not see the fitter's operations, and vice versa.

The screenshot shows a web form titled "Edit Operation" with a close button (X) and a "Save" button. The form contains several fields:

- Operation Name:** A text input field containing "QC Inspect Flange".
- Operation Label:** A text input field containing "QC Inspect Flange".
- Start Warning:** A text input field containing "Enter warning message".
- Required Roles:** A dropdown menu with two selected items: "Fitters" and "Super User".
- Required Groups:** A dropdown menu with one selected item: "Super users".
- Failure Status:** A text input field containing "Inspection Failed".

A blue chat bubble icon is visible in the bottom right corner of the form area.

2. Required Permissions

In addition to group membership, the user group must have the correct permissions enabled for remote workflows. These permissions are configured in the Manage Users section of Control Center under the specific user group's permission settings.

Remote Workflow Execution

To execute standard workflow operations remotely in Control Center, the user group must have the following permission enabled:

- **Remote Execution of Operations**

Without this permission, operations will not appear in the Workflows tab even if the user belongs to the correct group and the entity is in the correct state.

Remote QC/QA

For Remote QC/QA sign-off, the user group requires additional permissions beyond Remote Execution of Operations. The following permissions must be enabled on the QC or QA user group:

- **QA Remote Approval**

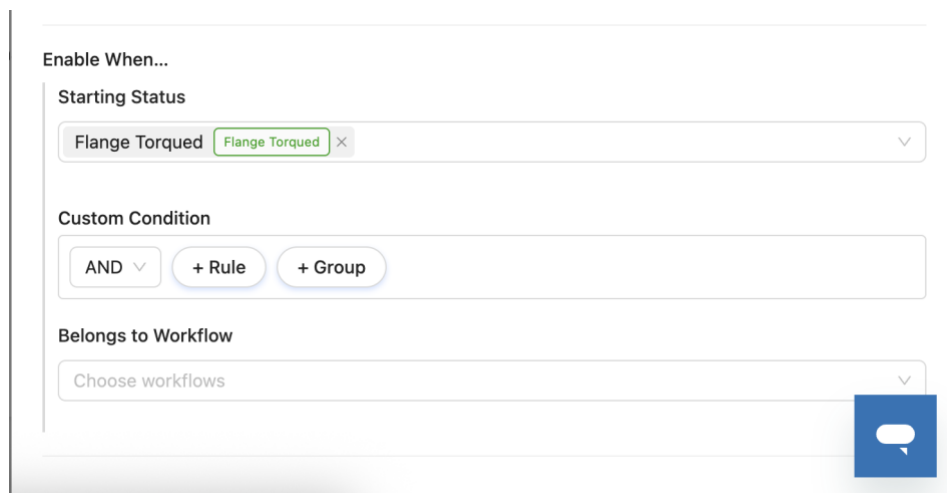
- **QC Remote Approval**

Assign the appropriate permission based on the group's role: QA Remote Approval for QA groups, QC Remote Approval for QC groups. Both may be enabled if the group performs both functions.

3. Correct Conditional State

The entity must be in the correct conditional state for the operation to appear. Workflow operations are tied to prerequisite statuses – an operation only becomes available when the entity has reached the required status in its workflow progression. If the entity has not yet reached that status, the operation will not show up.

The entity's current status is displayed in the status progression bar at the top of the entity detail page. Each status badge represents a workflow state (e.g., Untouched, PreparationAssessmentCompleted, EquipmentPoweredDown, etc.). Operations tied to a given prerequisite status will only appear when the entity's current status matches.



If either condition is not met – the user is not in the correct group, or the entity is not in the correct state – the operation will not appear in the Workflows tab.

ACCESSING REMOTE OPERATIONS

Remote operations are accessed through the entity detail page in Control Center.

Navigating to the Entity

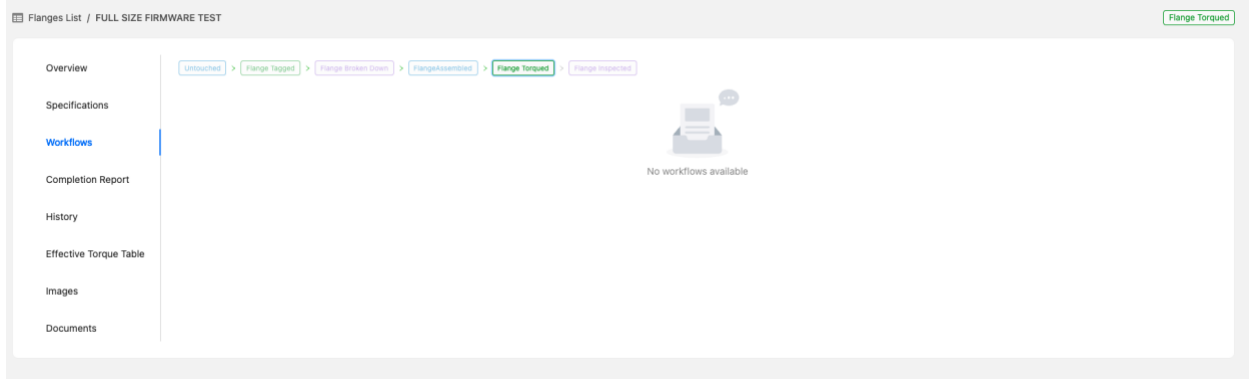
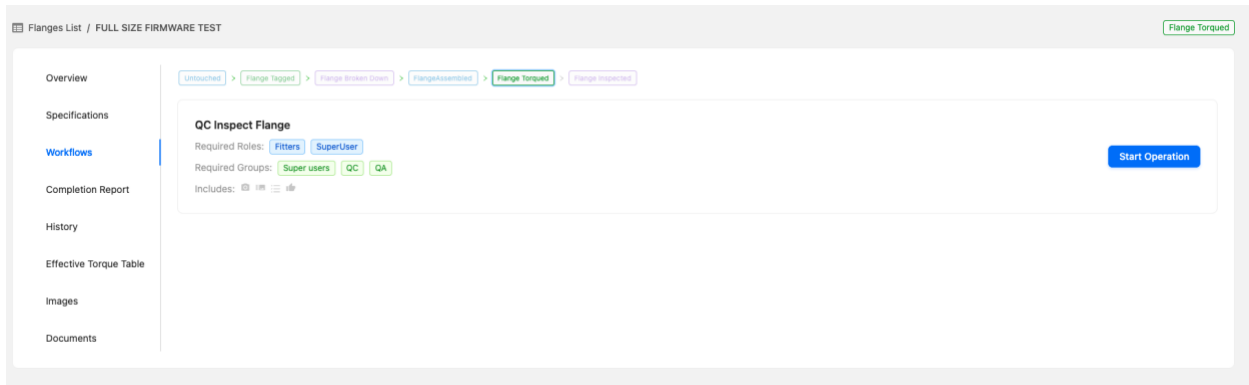
From the entity list, select the entity you want to work on. The entity detail page opens with several tabs in the left navigation panel:

- **Overview** – Displays the entity's specifications, current status, history, and associations.

- **Specifications** – Shows the full set of data fields for the entity.
- **Workflows** – Lists the available workflow operations that the current user can execute.
- **Completion Report** – Displays the completion report, including the Remote QC/QA button when applicable.
- **History** – Shows the chronological record of all completed operations for the entity.
- **Images** – Displays any photos captured during workflow execution (if applicable).

Opening the Workflows Tab

Select the Workflows tab from the left navigation panel. If operations are available for the current user and the entity's current state, they will be listed here. If no operations are available, the tab will display "No workflows available" – this means either the user does not belong to the required group, or the entity is not in the correct conditional state for any operation.



EXECUTING AN OPERATION

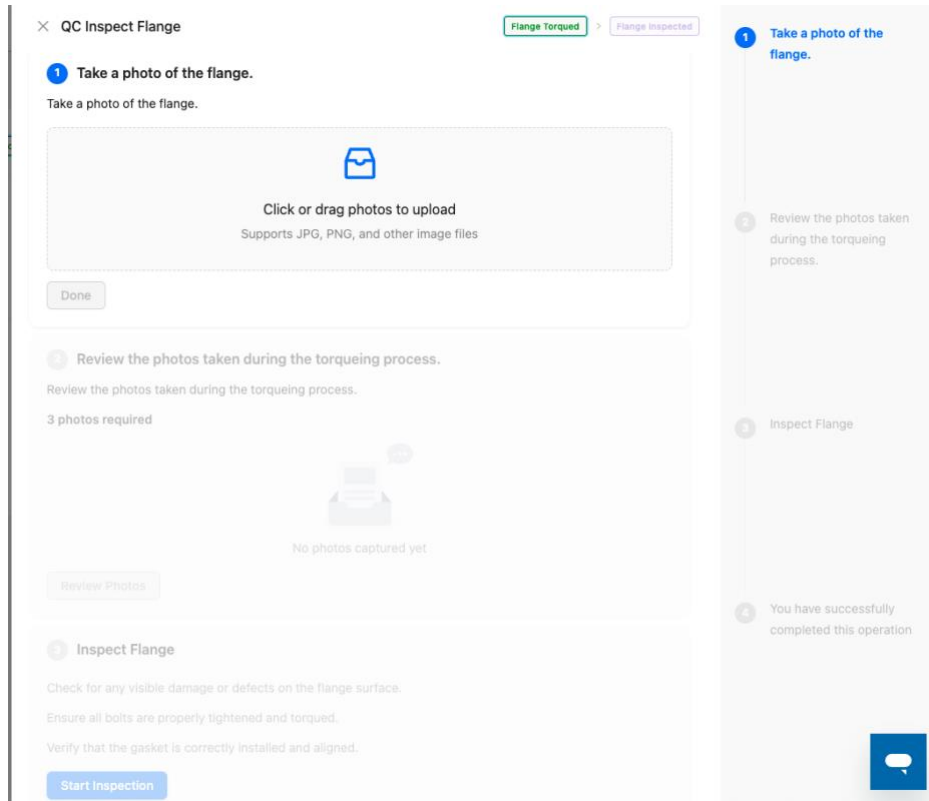
When an available operation is listed in the Workflows tab, select it to begin execution. Control Center walks you through the same action steps that would appear in CMA – including checklists, data entry fields, photo capture, confirmations, and signature lines.

Completing Action Steps

Each operation consists of one or more action steps. These may include:

- **Checklists** – Answer each question in the checklist. Required fields must be completed before proceeding.
- **Data Entry** – Enter values in the required fields (text, numeric, date, etc.).
- **Photo Capture** – Upload photos from your computer when photo steps are required.
- **Tool Selection** – Select a tool from the registered tools list, if the operation requires it.
- **Confirmation** – Review the operation summary and confirm to complete the operation.
- **Signature** – Provide a digital signature when required (used in QC/QA sign-off flows).

Complete each step in sequence. Once all required steps are finished, confirm the operation to record the results. The entity's status will advance to the next state in the workflow, and the completed operation will appear in the History tab.



Operation History

After completing an operation, the result is recorded in the entity's History section. The history entry shows the operation name, the user who performed it, and the timestamp. This record is identical whether the operation was completed in CMA or remotely in Control Center.

REMOTE QC/QA SIGN-OFF

Remote QC/QA sign-off is a specific use case of remote execution that allows QC and QA inspectors to review and sign off on completed work directly from Control Center. This is particularly useful when inspectors need to review completion reports, verify data, and apply their signature without being on-site with a mobile device.

Additional Requirement: Signature Line

For the Remote QC/QA button to appear, the operation must meet one additional requirement beyond the standard group membership and conditional state rules:

The operation must end with a confirmation step that includes a signature line.

If the signature line is not configured on the final confirmation step of the operation, the Remote QC/QA button will not appear in the Completion Report tab. This is a workflow

configuration requirement – the signature line must be added in Workflow Builder before remote QC/QA sign-off will be available.

Without a signature line on the final confirmation step, the Remote QC/QA button will not appear – even if all other conditions are met.

Accessing Remote QC/QA

When all conditions are met (group membership, correct state, and signature line configured), the Remote QC/QA button appears on the Completion Report tab of the entity detail page. Select it to begin the QC or QA review.

Completing the Review

The Remote QC/QA flow presents the reviewer with the completion report data, any required checklist items, and the signature line. The reviewer can:

- Review all bolt-by-bolt data, inspection results, or test outcomes from previous operations
- Complete any required QC/QA checklist questions
- View photos and documentation captured during prior steps
- Apply their digital signature to complete the sign-off

Once the signature is applied and the confirmation is submitted, the QC/QA operation is recorded in the entity's history and the entity advances to the next workflow state.

TROUBLESHOOTING

Operations Not Appearing

If the Workflows tab shows "No workflows available" or the expected operation is missing, check the following:

- **Group membership** – Confirm the user is a member of the group assigned to the operation (not just that they have elevated permissions or a Super User role).
- **Entity state** – Verify the entity is in the correct prerequisite status for the operation. Check the status bar at the top of the entity detail page.
- **Workflow configuration** – Verify the operation exists in the workflow and has the correct prerequisite status and user group assigned in Workflow Builder.
- **Workflow conditions** – If the operation has conditional rules (e.g., based on connection type, rating, or zone), verify the entity's data matches the conditions.

Remote QC/QA Button Not Appearing

If the Remote QC/QA button is not visible on the Completion Report tab, check:

- **Signature line** – Confirm the operation's final confirmation step has a signature line configured in Workflow Builder. This is the most common cause.
- **Group membership** – Confirm the user belongs to the QC or QA group assigned to the operation.
- **Entity state** – Confirm the entity is in the correct prerequisite status for the QC/QA operation.

SUPPORT AND CONTACT

For assistance with remote workflow execution, group configuration, or Workflow Builder setup, contact your Cumulus customer support professional or email support@cumulusds.com.