

Cumulus Control Center Guide

Asset Index

Document Version: 1.0
Release Date: May 2026



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Introduction

The **Asset Index** section of Cumulus Control Center is where you create and manage the assets that are tracked and worked on across your site. Each asset type has its own Index — a searchable list view of all assets of that type — where super users can create assets individually or in bulk, view asset status, Edit an Asset, and navigate into individual asset records.

Asset types that have been configured with Data Builder will show additional child asset information when you open a parent asset record. **For full details on configuring Data Builder, refer to the separate Cumulus Data Builder Guide.**

This guide assumes Workflows and Asset type creation is already completed within Cumulus Control Center. For information on configuring asset type workflows and properties, refer to the Cumulus Workflow Builder Guide.

Purpose

The Asset Index section allows you to:

- View and search all assets of a given type on the Index page.
- Create new assets individually or in bulk via import.
- View and edit the details, properties, history, and completion reports for individual assets.
- Monitor asset status across your site from a single list view.
- Navigate directly to child assets associated with a parent asset record.

Key terms

Term	Definition
Asset Type	A category of asset that has its own workflow, properties, and statuses configured in Workflow Builder (for example, Flanges, Electrical Terminations, or Structural Connections).
Index	The list view within an asset type in Control Center where all assets of that type are displayed, searched, and managed.
Asset	An individual record within an asset type — representing a single physical connection, component, or item tracked in Cumulus.
Asset Status	The current state of an asset as recorded in Cumulus, such as Ready for Tightening, Completed, or Rejected.



Term	Definition
Parent Asset	A top-level asset record that has associated child components linked to it, typically configured via Data Builder.
Child Asset	A component or connection record that is linked to a parent asset. Child assets are displayed within the parent asset's record.
Bulk Upload	The process of creating multiple assets at once by importing a completed spreadsheet template via the Import screen.
Completion Report	A generated PDF record for an asset that captures all recorded work, data, and approvals for that asset.

Prerequisites

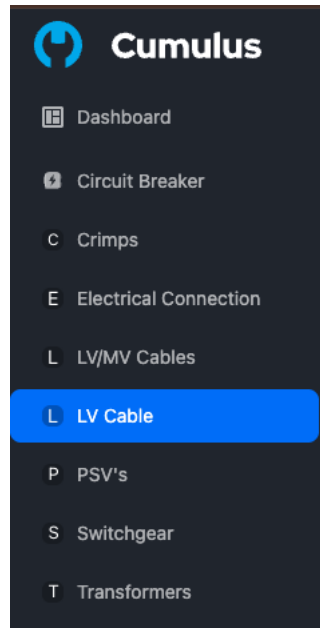
Before creating assets, ensure the following are in place:

- At least one asset type has been configured in Workflow Builder with its workflows, stages, properties, operations, and statuses.
- You have a valid Cumulus Control Center login with the appropriate permissions to create or edit assets.
- You have the following permissions:
 - For uploading and managing data: **Data Editor, Template Viewer, Data Importer, Data Viewers, Master Record Approvers, Completion Report Viewer**
 - For viewing data only: **Data Viewers**
 - For utilizing the remote approval in the index, you will need: **QA Remote Approval, Remote Execution of Operations, QC Remote Approval.**



Navigation

As asset types are created within Control Center, their individual Index tabs will populate on the far-left hand navigation pane.

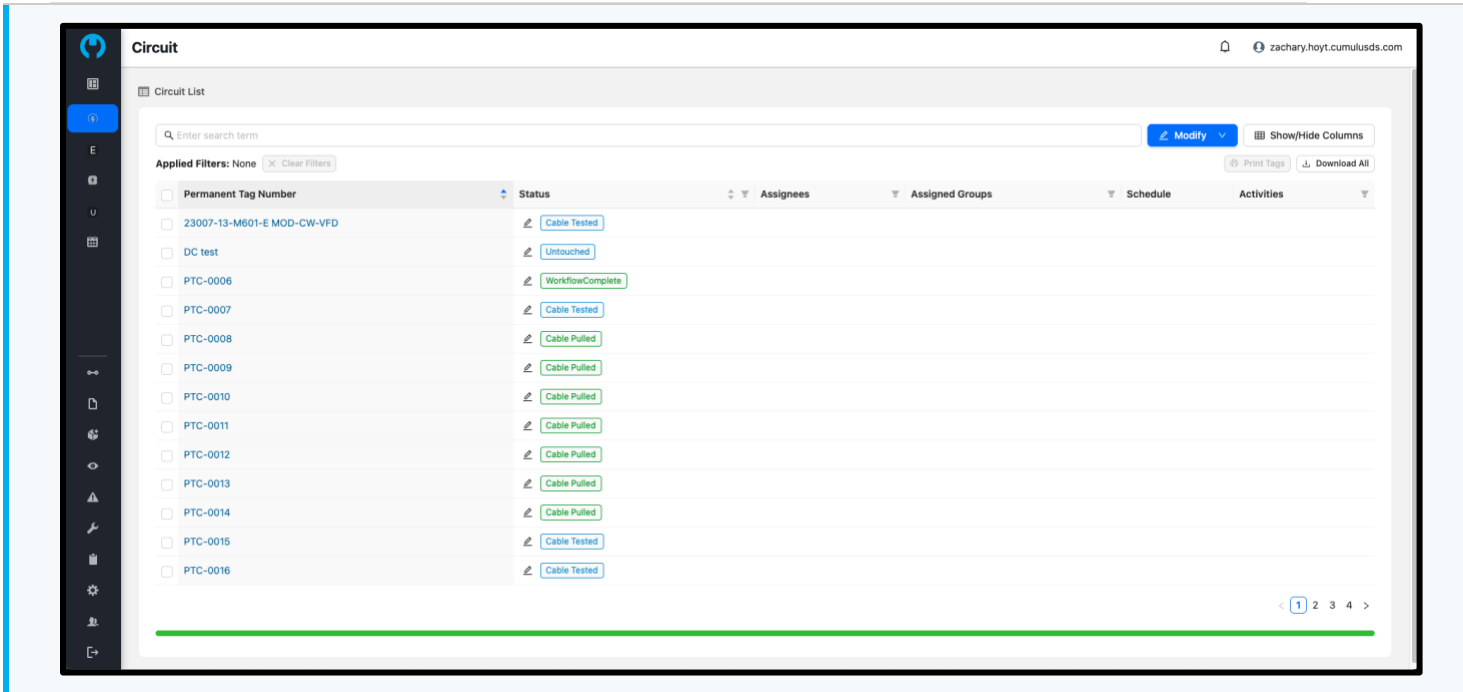


The Index

The Index is the primary list view for any asset type in Control Center. It displays all assets of that type with their current status and key properties, and is where you create, search, and manage assets.

Navigating to the Index

- Select the relevant asset type from the navigation bar on the left side of Control Center.
- The Index page loads, displaying all assets of that type in a searchable, sortable list.
- Use the **Show/Hide Columns** button to choose which data columns are displayed. The list of selectable columns are the properties defined when the Asset Type was created.
- Use the search bar to filter assets by any visible column value.
- Filtered views are persistent for when you travel away from this page



Viewing an Asset Record

Selecting an asset ID from the Index opens the asset's detail record, where you can view and interact with all information captured for that asset.

- The **Overview** tab shows high-level details, recent history, and last recorded values for the asset.
- The **Specifications** tab displays the full property set for the asset. Select **Edit** to update any property values. Changes are saved to the database immediately and are visible to field users on their next sync.
- The **History** tab shows the full work and edits history for the asset, starting with the most recent entry. Expand any entry to view tightening data, checklist answers, or captured photos.
- The **Completion Report** tab displays the current completion report for the asset. Select **Download** to save it as a PDF.

Note: If a Connection Edit Ticket is enabled for your site, editing asset properties will generate a ticket that must be reviewed and approved. See the Tickets Guide for details.



The screenshot displays the 'Flanges' application interface. The left sidebar contains navigation options: Overview, Specifications, Workflows, Completion Report, History, Effective Torque Table, Images, and Documents. The main content area shows a list of operations:

- Flange Assembled**: akhan.cumulusquality completed operation Assemble Flange on April 22nd 2026, 1:22:53 pm (CDT). Includes a 'View Report' button.
- Flange Torqued**: Zachary Hoyt completed operation Torque Flange on April 22nd 2026, 1:22:11 pm (CDT). Includes a 'View Report' button and a 'Hide details' link.

Below the operations is a 'Torque Summary' section with a table:

Pass Name	Planned Torque	Actual Torque (range)
<input checked="" type="radio"/> Torque Bolts - 30%	3.6 lbf-ft	3.7 - 9.6 lbf-ft
<input type="radio"/> Torque Bolts - 60%	7.2 lbf-ft	7.2 - 10.7 lbf-ft
<input type="radio"/> Torque Bolts - 100%	12.0 lbf-ft	12.0 - 12.0 lbf-ft

A legend below the table indicates: Over Torqued (red), Torqued Above Tolerance (yellow), Torqued Within Spec (green), and Unstarted (grey). Below the legend is a circular diagram with 8 numbered positions (1-8) around a central hole, with positions 1-4 in green and 5-8 in red.

Creating Assets

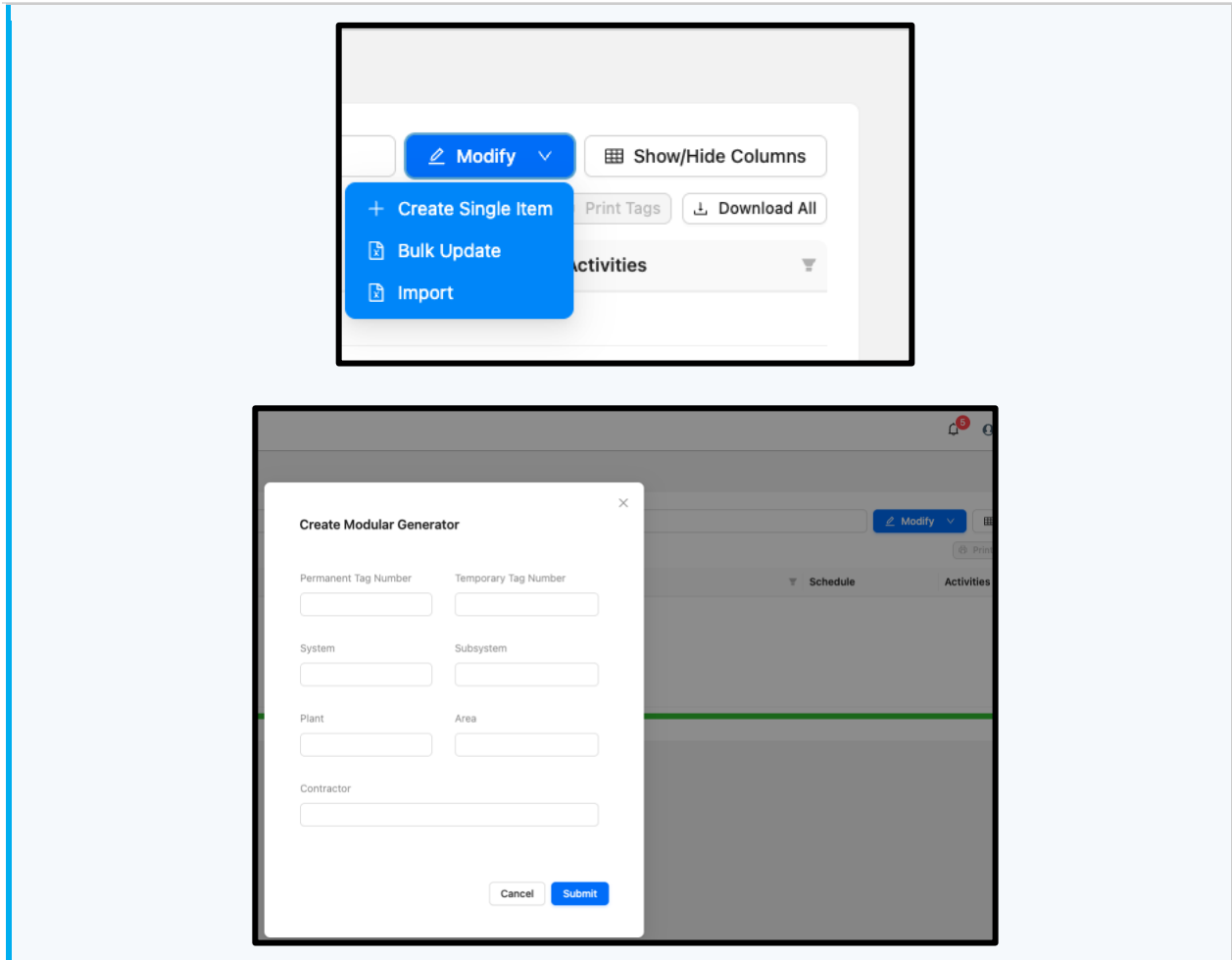
Creating a Single Asset

You can create a single asset directly from the Index page.

- Select the **Modify** button on the Index page. Then from the drop-down menu “+ Create Single Item”
- Complete the required property fields for the new asset.
- Select **Submit** to create the asset.

An Asset will be created and started under the “Untouched” Status. “Untouched” is the starting status for all Assets, to learn more about statuses and how they work see the Workflow Builder guide or ask your assigned Customer Success Professional.

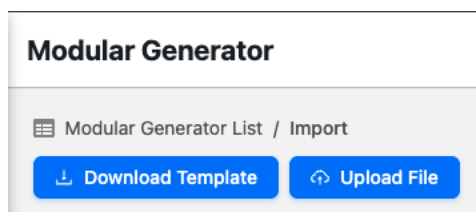
**Note: For asset types configured with Data Builder, saving a new parent asset automatically generates the associated child assets based on the configured templates. Child assets appear within the parent asset record once creation is complete.*



Bulk Upload

The Index supports bulk creation of assets using an import sheet. This is the recommended approach when creating large numbers of assets at once.

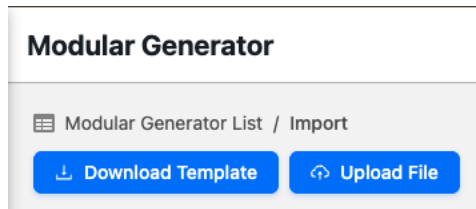
- Select the **Modify** Button from the Index page.
- Select **Import** from the drop-down menu
- Select **Download Template** to bulk upload template for the asset type. **Import Templates** are per asset type specific. Please ensure you are utilizing the correct template performing a bulk import.



- An Excell Spreadsheet will then be downloaded.



- When you open the excel sheets you will see a header row populated, In that header row there are some system defined properties (as described in the dashboard guide) these properties do not need to be filled out and have no effect on the asset, but are utilized for Analytics within the platform.
- The properties are: Temporary Tag Number, System, Subsystem, Plant, Area, and Contractor.
- Users will also see to added columns at the end of the spreadsheet that are not a part of the property array build in the workflow builder. These are Associate Document, and Associate Activities. Both Columns are ease of use columns that allow automatic association upon import rather than through the UI. (Those will be covered under there respective sections)
- Complete the required property fields for each asset in the spreadsheet. Headers and columns on the import sheet are determined by why the user has created for that asset.
- Once your upload sheet is completed, Under the import selection from the modify menu, click upload file, this will allow you to find and select the file you wish to import



- The first screen you see during the upload process will be the “change or confirm header selection screen”, This screen is a verification for the uploading user that the header row the Control Center within the upload sheet is the correct one

Change or Confirm Header Selection ×

A	B	C	D	E	F	G	H	I
Permanent Tag Number	Temporary Tag Number	System	Subsystem	Plant	Area	Contractor	Associate Document	Associate Activities
GEN-1001	TMP-GEN-001	ELEC-SYS	Primary	Plant D	Area 1	Caterpillar Electric	DOC-GEN-2024-001	Install
GEN-1002	TMP-GEN-002	COOL-SYS	Auxiliary	Plant B	Area 3	Caterpillar Electric	DOC-GEN-2024-002	Energize
GEN-1003	TMP-GEN-003	FUEL-SYS	Standby	Plant D	North Bay	Caterpillar Electric	DOC-GEN-2024-003	Test & Inspect
GEN-1004	TMP-GEN-004	EXH-SYS	Emergency	Plant A	East Wing	Kohler Power	DOC-GEN-2024-004	Install
GEN-1005	TMP-GEN-005	GEN-SYS	Secondary	Plant D	South Bay	Cummins Power	DOC-GEN-2024-005	Test & Inspect
GEN-1006	TMP-GEN-006	EXH-SYS	Auxiliary	Plant B	Area 1	Generac Industrial	DOC-GEN-2024-006	Load Test
GEN-1007	TMP-GEN-007	GEN-SYS	Secondary	Plant D	Area 2	Generac Industrial	DOC-GEN-2024-007	Commission
GEN-1008	TMP-GEN-008	FUEL-SYS	Standby	Plant D	Area 3	MTU Onsite Energy	DOC-GEN-2024-008	Test & Inspect
GEN-1009	TMP-GEN-009	EXH-SYS	Auxiliary	Plant A	Area 4	MTU Onsite Energy	DOC-GEN-2024-009	Commission

< 1 2 3 4 5 6 > 10 / page

Confirm Header

- Once your Header row is confirmed the Column mapper will open. **The Column mapper is the most important step when completing a bulk upload.** In this Screen users are mapping what



headers they may have changed or customized in their upload sheet to the correct properties for that particular asset type. A miss configuration here at the column mapper could lead to larger data issues within Cumulus and result in an undesirable outcome.

- There are two sections on the column mapper, the Asset property on the left and the Spreadsheet header on the right.
- In a list view the Users are given the opportunity to match Property to Header one to one ensuring data is being uploaded to the correct property.

Change or Confirm Column Matches ✕

Entity Property	→	Spreadsheet Header	Unit
Permanent Tag Number	→	Permanent Tag Number ▾	
Temporary Tag Number	→	Temporary Tag Number ▾	
System	→	System ▾	
Subsystem	→	Subsystem ▾	
Plant	→	Plant ▾	
Area	→	Area ▾	
Contractor	→	Contractor ▾	
Spreadsheet Association Header	→	Entity Type	
Associate Document	→	Document ▾	
Associate Activities	→	Activities ▾	

[Confirm Columns](#)

- After confirming the headers, a final “Review and Finalize” is prompted to confirm. There are two sections on top you will see a “Preview” of the connections that will be created, and on the bottom if you have any association being made.
 - Please take a good look at this review, and the associations at the bottom. Please ensure you are mapping Assets to the correct Activity or Document on upload.
- Click “Submit” to process your upload, you will see a status bar populate on the bottom right, and when completed you will return to the Import screen, you are done with your bulk upload
- On the import screen you will see all uploads attempted. From this view you can see any failures and the progress of past uploads



Cumulus Mobile App Behavior

Assets created and managed in the Index are immediately available to field users in the Cumulus Mobile App (CMA) after syncing. There is no additional setup required on the CMA side.

In the CMA, field users:

- Select the relevant asset type and choose the specific asset they need to work on.
- See all workflow steps, operations, and checklists assigned to that asset.
- For parent assets with child components, select the specific child asset to perform work on it.
- Record all work data — tightening passes, inspections, checklist answers, photos — which syncs back to Control Center and appears in the asset's History tab.

Viewing Assets

Once you upload, filter or search for the asset in you are looking for Users can select that assets and view more information and manage that asset. Cumulus has multiple different views and tabs for users with that Assets Record to perform, these views are:

- Overview: The Overview is the landing page for users when clicking on an individual asset, it gives a quick snapshot.
- Specifications: Is and in-depth view of all properties from an asset.
- Workflows: where users can perform remote work executions*If configured*
- Completion Reports: Where the individual Completion record for that Asset lives
- History: An historical record of that specific asset's life, with all actions ever performed against it
- Images: A collection of all Pictures taken throughout the workflow
- And depending on what actions being performed in the workflow Either: Effective Torque table, Pressure test, or Electrical test. Each give users a granular look into what data was captured from the field.

Overview

The overview page gives users a quick snapshot for the Asset, showing the top eight properties as organized in the workflow builder, a brief view of the history on the right and any child associations to the asset at the bottom.



Specifications

The specification page is the most in-depth view into all values and properties that make up an asset.

In the specifications page you have a view of all asset properties. These properties are what has been set up in the workflow builder. Users will also see some system defined properties to the right of the screen. These have been set by Cumulus to help users add hierarchy to data for use in the analytics portion of the dashboard.

Editing data in specifications:

The specifications tab is the simplest way any super user can edit data within cumulus.

- Click on the “edit” button on top of the central pane.



 Edit

Permanent Tag Number

BAT-001-DH01-Z01

Temporary Tag Number

N/A

- This will open all specification field for editing. After updating a field, Users can save their edits with the save button.

 Save

 Cancel

Permanent Tag Number

BAT-001-DH01-Z01

Temporary Tag Number

- If Edit tickets are enabled and configured correctly this will cause a new ticket to be opened.

Workflows

Users are given the ability to perform workflows inside of the Control Center Correctly. (see the Remote Operations Execution Guide for Configuration and Set up details)

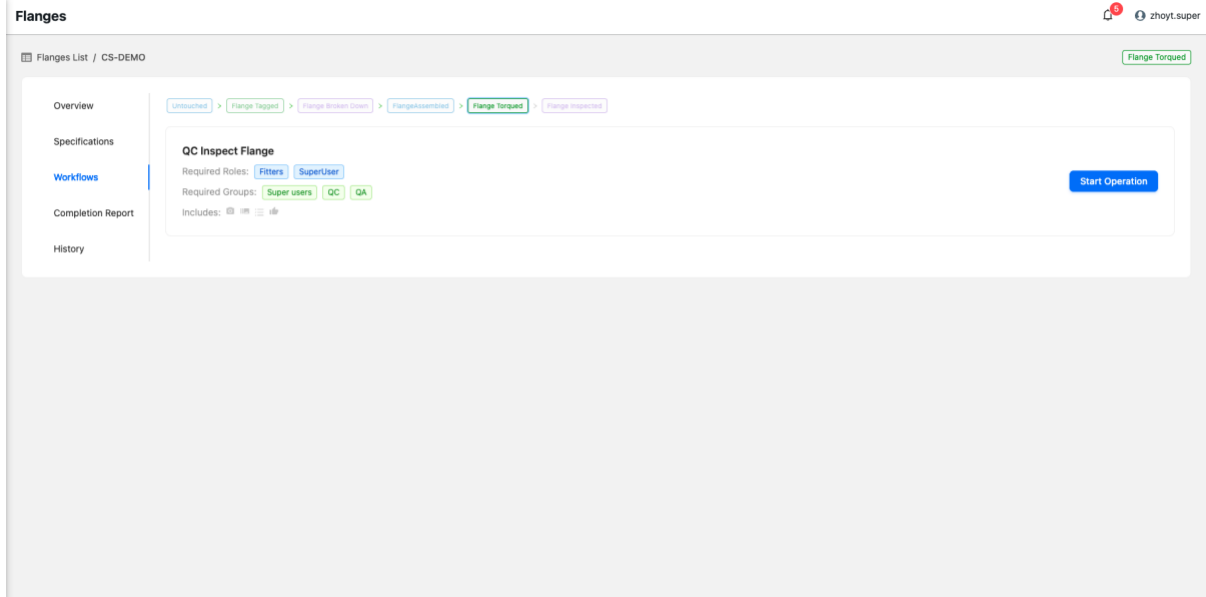
Before you start the following permission are required:

- **Remote Execution of Operations**
- **And depending on your role either QA Remote Approval or QC Remote Approval**

Users also need to have the correct groups assigned to a specific operation within the Workflow to complete work remotely.

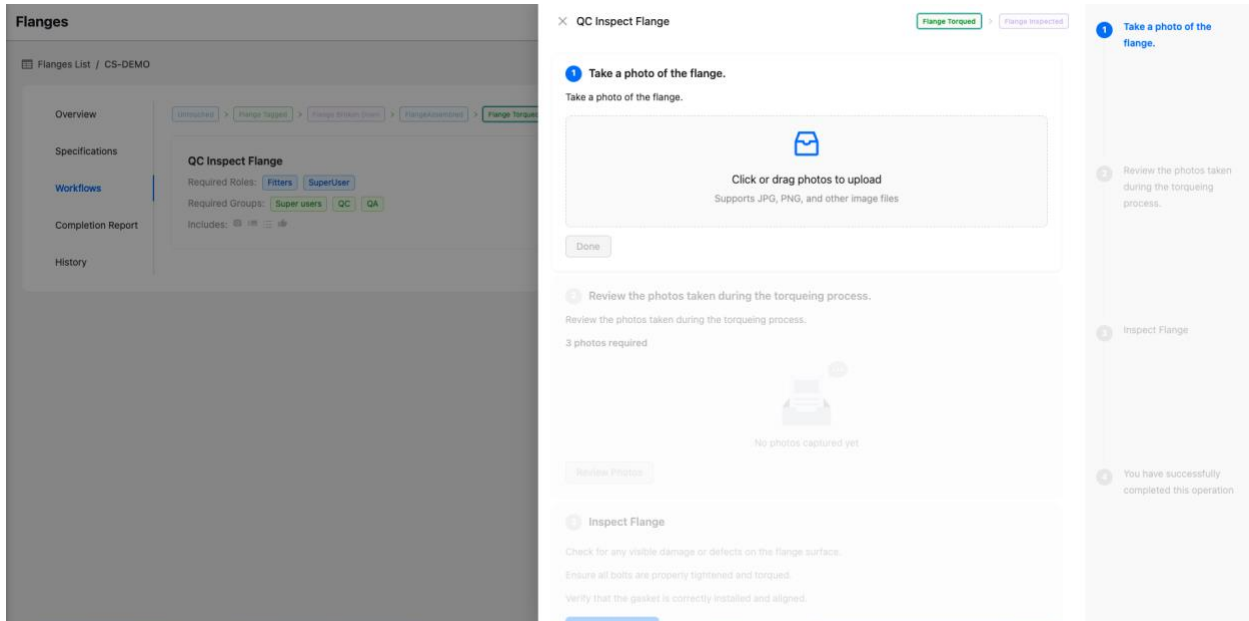


If configured correctly, selecting the workflows tab should surface all workflows available to be completed at that time:



To Start and complete Remote work

- First select the “Start Operation Button”
- This will open a side pane to the right and will walk users through each configured step



- The Remote Work Operation will walk users through each step prompting them as configured on the Workflow Builder to complete each action within the operation.
- When all actions have been completed the “I confirm the above” check box needs to be selected to populate the final “Finish” button.



Remarks

none

I confirm the above

Finish

You have successfully completed this operation

Not all Action types are available for use when utilizing the Remote Workflow Operations module.

- Any connected tools actions or any scanning action will not be available to complete remotely.

Completion Reports

Completion reports are the most important Artifacts within Cumulus; the reason everyone utilizes the software is to have this digital record created at the end of work.

Completion reports are created at every status point throughout the workflow (Except at Creation) At the History tab.

The Completion Report that is surfaced when selecting the Completion reports tab is the most recent and current version of this report.

Flanges zhoyt.super

Flanges List / CS-DEMO Flange Torqued

Overview Download Approve/Reject Report

Specifications

Workflows

Completion Report

History

RECORD: CS-demo Page 1 of 1

FLANGES DATA SHEET

RECORD	SYSTEM	ID	CLIENT DOCUMENT NUMBER	ENTRY STATUS
CS-demo Rev 000	N/A	CS-demo	N/A	Flange Torqued
			SUBSYSTEM	DATE CREATED UTC
			N/A	Jun 9th 2026 12:38:16

MATERIAL	OUTER DIAMETER	INNER DIAMETER	THICKNESS	FINISH
N/A	N/A	N/A	N/A	N/A

STANDARD	PRESSURE RATING	FLANGE TYPE	CONNECTION TYPE	CORROSION RESISTANT
N/A	N/A	N/A	N/A	N/A

NUMBER OF BOLTS	TIGHTENING METHOD	SHAPE
4	Manual Torquing	22

REQUIRED TORQUE VALUE
55.0 lbf ft

COMMENTS

FULL NAME	COMMENTS	TIME UTC
Zachary Hoyt		Jun 9th 2026 12:38:12

Users can view, download, and Super Users can approve/reject completion reports from this tab. When downloading the report utilizing the “download” button, will pull the exact visual report as a .PDF.

Approve/Reject

The Approve/Reject gives an extended arm to the Quality departments and allows them a final look at a record.



The Approve/Reject button populates at the top right of the completion reports tab is permission based; users will need the same permission set as described above for the Remote Work Operations.

- When selecting the approve/reject button a side pane will open to conduct the next workflow operation exactly like described before, allowing Users to do remote work as they see fit.

Note: to enable the Approve/Reject button on the Completion Reports tab, you must first activate the Signature Line configuration in the Workflow Builder for the Operation.

History

This History Tab is a live Historical record off all actions taken against an asset. The history tab is a powerful tool that is the source of truth about the life of any given asset.

The Default view for the histories page is a timeline of view of records descending chronologically. Any and every action has the status the action took place in (or stage of the workflow) , who was the operator that performed the action, a time stamp in local time of when that took place, and off to the right a show details expansion to go into further detail of that record.

There are several different types of historical events that are tracked for an asset, we provide a drop down at the top of the screen to help users sort for what they may be looking for:

- Operator: Will give the users all names logged against Historical actions allowing them to pick out actions from a specific user
- Status: Or otherwise known as stages of the workflow, will give users the ability to home in on specific steps completed against that asset.
- Actions: Helps Users filter by Actions that might have happened outside of a workflow step like: Administrative removal or property edits.

When expanding an History Entry with the “Show Details” drop down Users will be shown relevant information about that step or action taken against the asset, there are quite a few different widgets for different types of actions:



- Associations: This widget shows any time the action of associating other assets to this one or this one to another.
- Electrical Testing: This widget shows specific in-depth view when one of the electrical tests are performed within CMA (Cumulus Mobile App).

Circuit zachary.hoyt.cumulusds.com

Completion Report
History
Insulation Resistance Table

Cable Tested Justin Wolf completed operation Insulation Resistance (Meg) Testing View Report

January 18th 2026, 9:28:21 pm (CDT) **Electrical test** Show details Hide details

Electrical Testing

Meg Test

Target Resistance	Required Voltage	Target Resistance Lower Limit
500.00 MΩ	1.00 kV	500.00 MΩ

Measured Resistance	Measurement	Test Voltage	Duration	Status
407.00 GΩ	A-B	1.02 kV	1m 0s	Pass
452.00 GΩ	A-G1	1.02 kV	1m 0s	Pass
401.00 GΩ	B-G1	1.02 kV	1m 0s	Pass

Tool Kits

Insulation Resistance Testing Kit

Model	Serial Number	Calibration
MIT1025/2-102605402	102605402	

Checklist Answers

Is the system de-energized and isolated?

Yes

Justin Wolf | June 12, 2026

Are all equipment connections disconnected prior to

** Any type of connected work will also show all tools kits utilized within that step (serial number, calibration, and tool model)*

- Torquing: This like the Electrical testing widget show an in-depth view of a Torquing Operation completed, along with the passes completed, an SVG rendering of the bolting pattern and per bolt captured torque value.



Electrical Equipment zachary.hoyt.cumulusds.com

Effective Torque Table TerminatedAndTorqued Justin Wolf completed operation Terminate & Torque View Report
January 15th 2026, 3:10:09 pm (CDT) Torqued Hide details ^

Images

Torque Summary

Pass Name	Planned Torque	Actual Torque (range)
Torque Pass	10.0 lbf-in	10.9 - 12.8 lbf-in

● Over Torqued ● Torqued Above Tolerance ● Torqued Within Spec ● Unstarted

1 2 3 4

- **Connection Edits:** Connection edit entries will show users who, what, when someone makes an update to an Asset and its property values.

Electrical Equipment zachary.hoyt.cumulusds.com

Overview Operator Status Actions Remove Operations

Specifications TerminatedAndTorqued Justin Wolf updated values View Report
January 18th 2026, 9:54:10 pm (CDT) Property edits Hide details ^

Workflows

Completion Report

History

Effective Torque Table

Images

Property Edits

Field	Before	After
Permanent Tag Number	PTC-0002	PTC-0002
Required TorqueValue	9.0 lbf-in	9.0 lbf-in
Tightening Method	Manual Torquing	Manual Torquing
Number Of Bolts	4	4
Startup Current	—	—
Shape	41	41

TerminatedAndTorqued Justin Wolf updated values View Report
January 18th 2026, 9:48:58 pm (CDT) Property edits Show details v

TerminatedAndTorqued Justin Wolf completed operation Terminate & Torque View Report

- **Revert History Viewers** Within Control Center We allow users to remove history entries, this allows ultimate control to curate history records and undo any unwanted entries. The necessary permissions required is:
 - **Revert History Viewers and Revert History Editors**

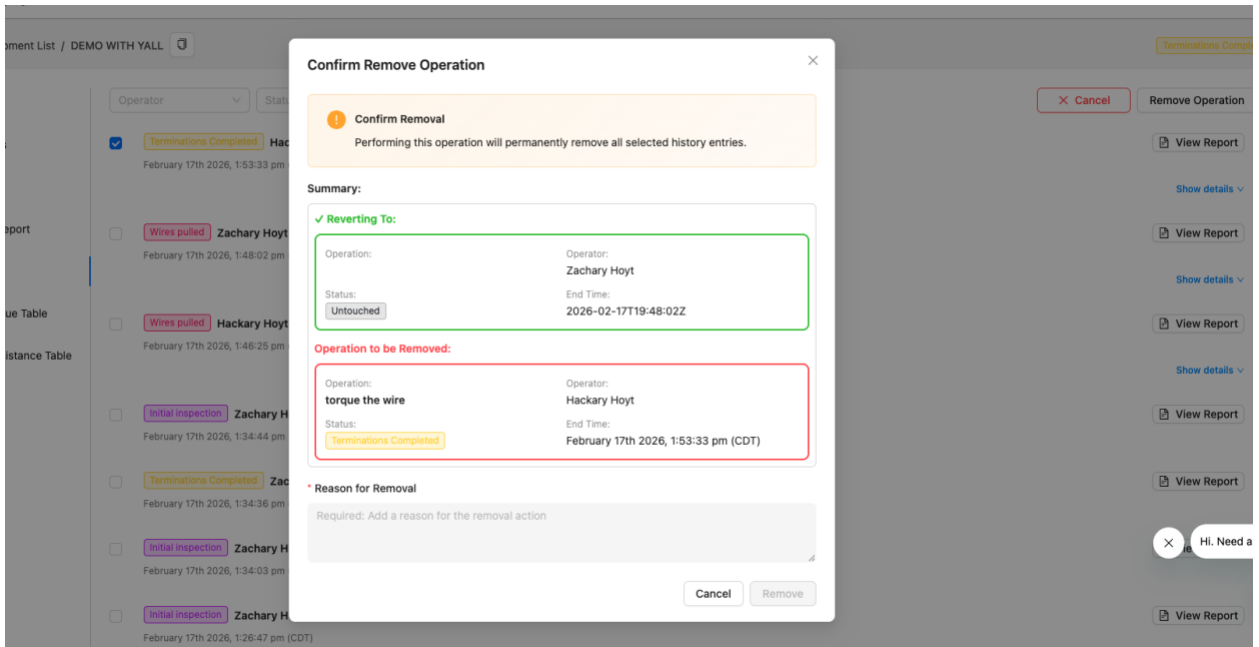


Removing Histories is a delicate process, to initiate select the remove operations button in the top right of the histories pane

Remove Operations

View Report

Selection boxes will open next to all history entries allowing users to select the one desired operation to remove. This will open a dialog box in the top right to remove the operation. After selecting the desired operations to remove and selecting the remove operation button a dialog box will show what exactly what the result will become when this history entry is removed.



The summary will show in green what the asset status will become and in red what is being removed. There also is a “Reason for Removal” dialog box that is Required for the user to write out why this entry is being removed. This comment will be placed into the removal history entry.

Note all Removal operations are **PERMANENT** and cannot be undone, by Cumulus employees or Cumulus Support.

Once removed the history entries will reflect that a removal took place. Displaying who, what and when the removal took place.



ITH YALL Wires

Operator Status Actions

Wires pulled Zachary Hoyt removed operations View Report

June 17th 2026, 2:24:38 pm (CDT)

Remarks: Operation committed on wrong asset Hide details

Removed History Events

Operator Name: **Hackary Hoyt** End Time: February 17th 2026, 1:53:33 pm (CDT)

Operation Name: **torque the wire** Status: **Terminations Completed**

Remarks:

- Ticket Approval/ Rejection: For every ticket generated it must be dispositioned, see the ticket user guide for information on ticket configuration, dispositioning, and impact. Within the histories tab an entry is logged for every ticket disposition within the system. Each ticket type is unique but will show in detail the cause of the ticket, who dispositioned it, when it was dispositioned and any comment that were made.

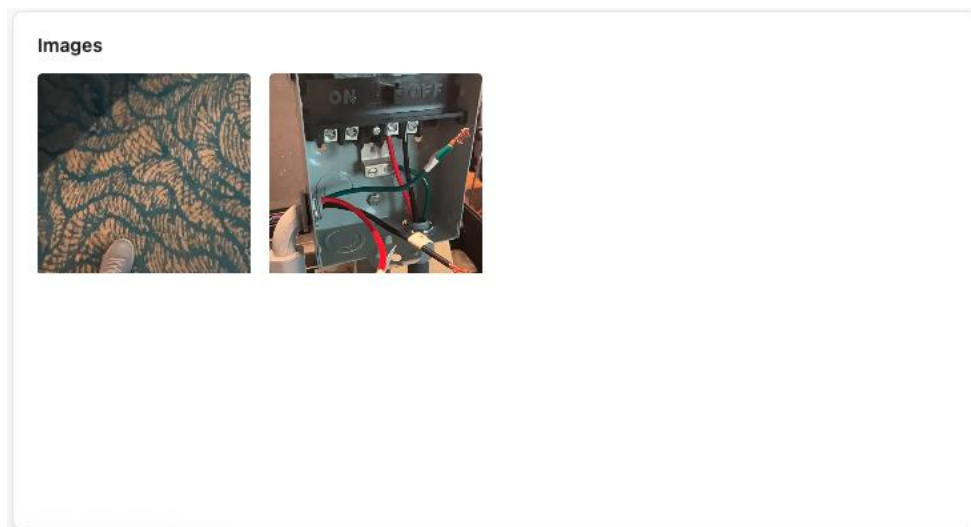
Wires pulled Zachary Hoyt edited the entity View Report

February 17th 2026, 1:48:02 pm (CDT) Property edit

Property Edit

Field	Before	After
Shape	—	11

- Images: All images captured throughout a workflow within CMA (Cumulus Mobile App) Have their own widget and will only show images taken within that step of the workflow.



- Checklist Questions: Checklist questions are an essential part of utilizing the Cumulus Mobile App and a part of every workflow built. Within the history entry they will populate for a specific step as its own widget.



[View Report](#)

[Hide details ^](#)

Checklist Answers

Have all surfaces been properly cleaned?

Yes

Zachary Hoyt | June 17, 2026

Have the flange bores been properly lubricated?

Yes

Zachary Hoyt | June 17, 2026

Is the heat code stud facing out?

Yes

Zachary Hoyt | June 17, 2026

Are washers installed on the studs?

Yes

Zachary Hoyt | June 17, 2026

< 1 2 >

Images

Images taken with CMA will populate in their own tab for the Index record not just populate in the history entries. The image tab will show ALL images taken for an asset for all time. Each image is populated with the Stage (status) for when the picture was taken in, who took the photo, when and allow the user to select each one to expand.

Overview

Specifications

Workflows

Completion Report

History

Effective Torque Table

Images

Search

Download all images

Terminate & Torque

TerminatedAndTorqued

Justin Wolf

2026-01-19 15:40

Terminate & Torque

TerminatedAndTorqued

Justin Wolf

2026-01-19 15:42



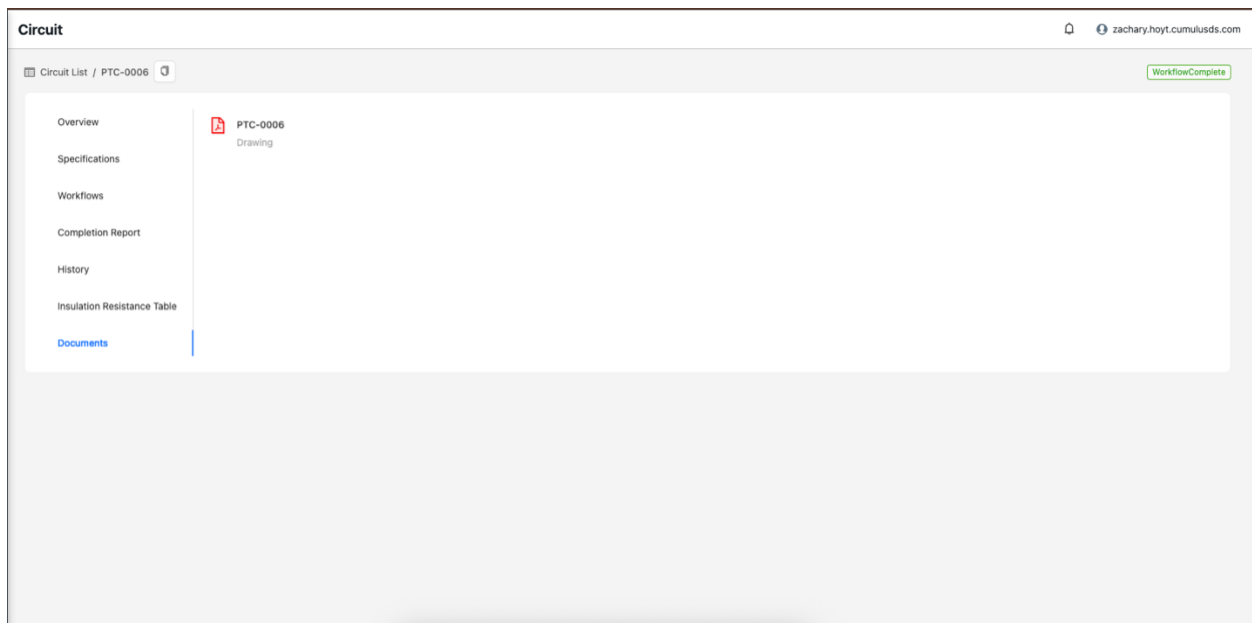
Picture controls are available for users to rotate, enlarge, and flip images as needed. Navigation controls at the top of the page allow users to filter out images by name, stage, user, with an also available date range filter. A Download all button at the top right is also available to pull images in mass for an asset.

Documents

Users can associate documents to Asset for reporting and Field use purposes. Linking a document will allow the users in the field to view the linked document for any use necessary. Typical document association seen are Isometrics or work procedures.

In the asset index tab, linked documents are surfaced when looking at a particular asset as a quick reference; this shows as its own tab.

Within the documents tab, all linked documents are shown. The document name, the document type, and what file type it is are shown as well. Users can click on the document name to be taken directly to that document.



Documents can be linked to an asset two different ways. The most efficient and easiest way is to utilize the Documents module on the far-left navigation pane. For more information on how to do this work, please see the Cumulus Control Center guide: Documents.

Option two works through the bulk import sheet. All import sheets have a documents column, the key to importing assets and automatically associating documents to have all documents uploaded and set first. If you upload an asset with a document name

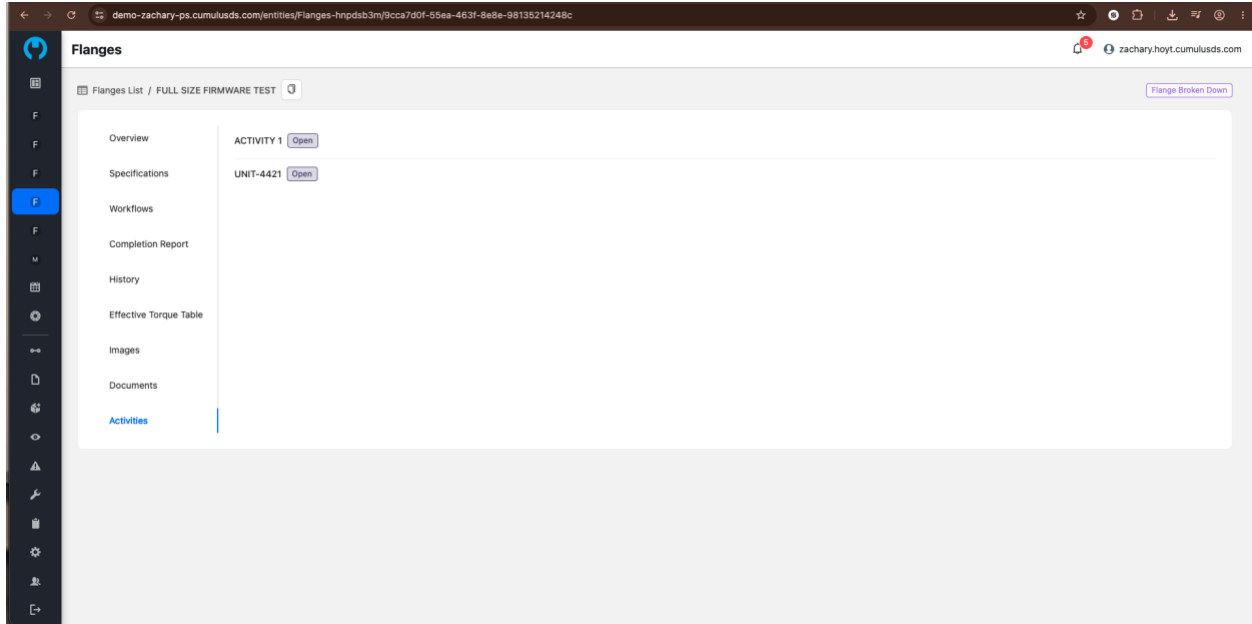
On the import sheet, in the associate document's column, copy and paste the document name, exactly how it appears in Control Center. Any deviation to the Name will cause the document to not link correctly.

Activities

Activities are a way for users to group Assets together from one or more asset types together. Organizing things together allows users to filter, search, and report on the group, simplifying the process.



Activities the asset you're on show in their own tab off the left, when on the tab for activities all currently associated will show, along with any closed activities the asset used to be associated with.

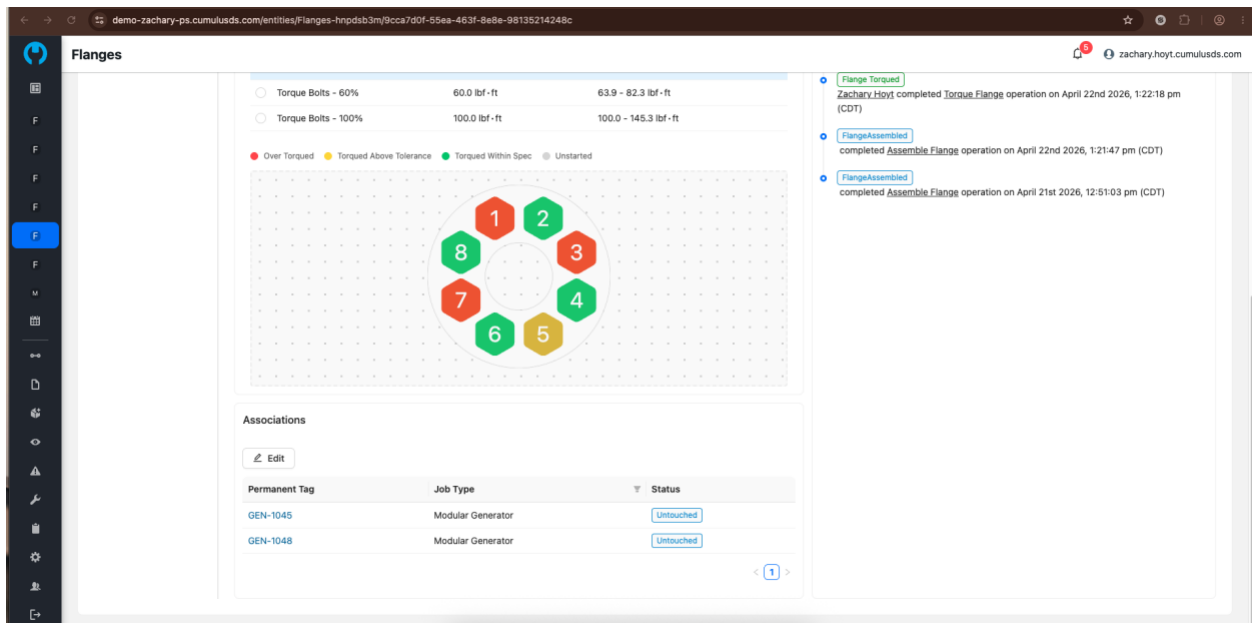


For more information on activities please see the Cumulus Control Center Guide: Activities for more.

Associations

Assets can be parents or children. This concept is accomplished within Control Center as Associations. An asset can be created to live as a subcomponent or a piece of a larger unit or module. Users can utilize this as another level of organization for assets and asset types to set up workflows better for field users or reporting.

Associated assets are shown in at the bottom of the Overview screen.

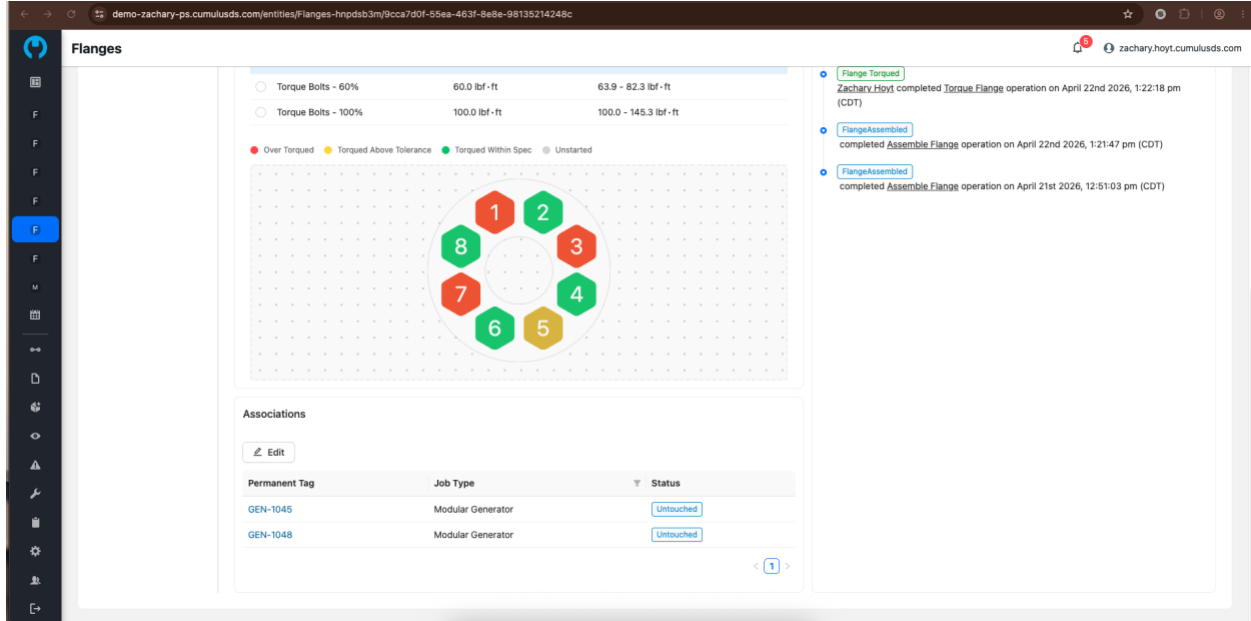




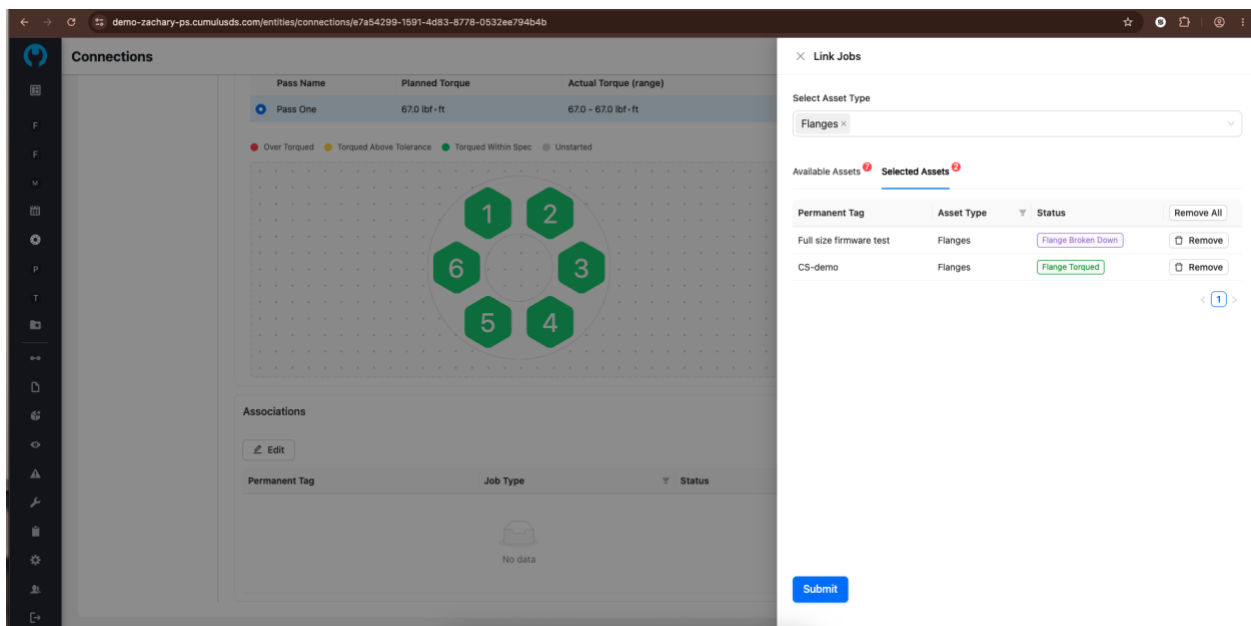
Adding an association can be done through the bulk upload import sheet, the quick action bar on the main index list, or by utilizing the UI available in the asset profile.

To Add an association with the Associations widget:

- First select the “edit button” This will open a side pane

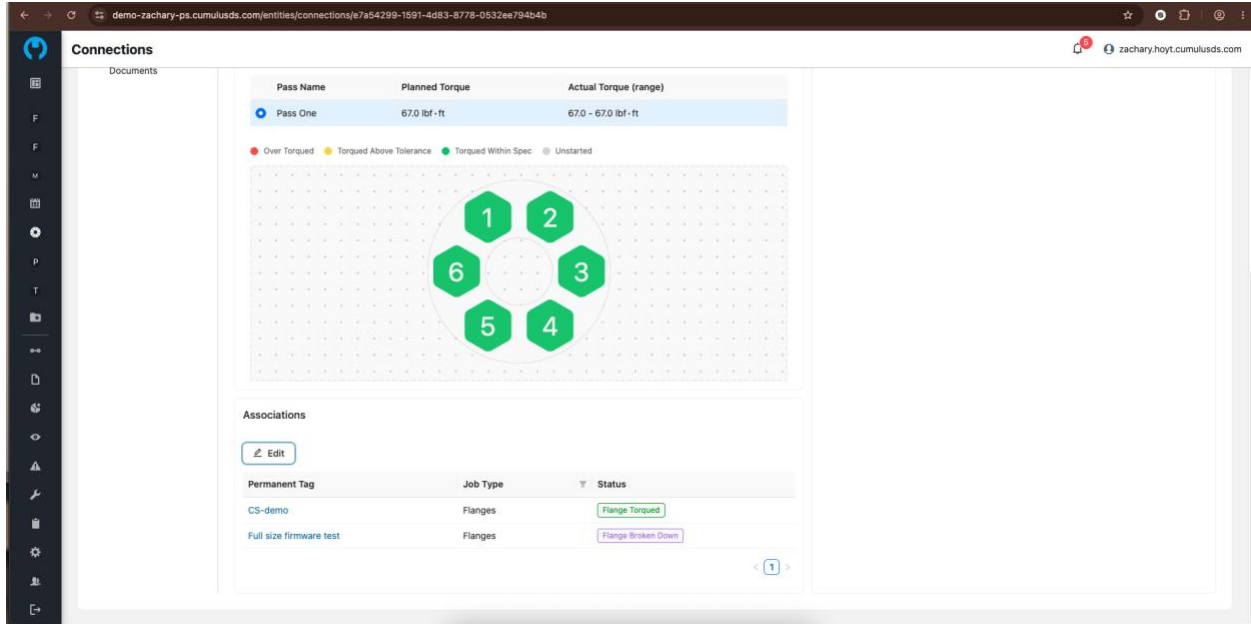


- On the side pane first select which asset type the asset you wish to associate to the current asset.
- The available assets tab will then populate with all the assets in the selected asset type. Utilize the search bar to select one or multiple assets to associate.
- Click the “+Add” button to queue all assets to be submitted for Associations, when all assets are queued move over to the selected asset tab



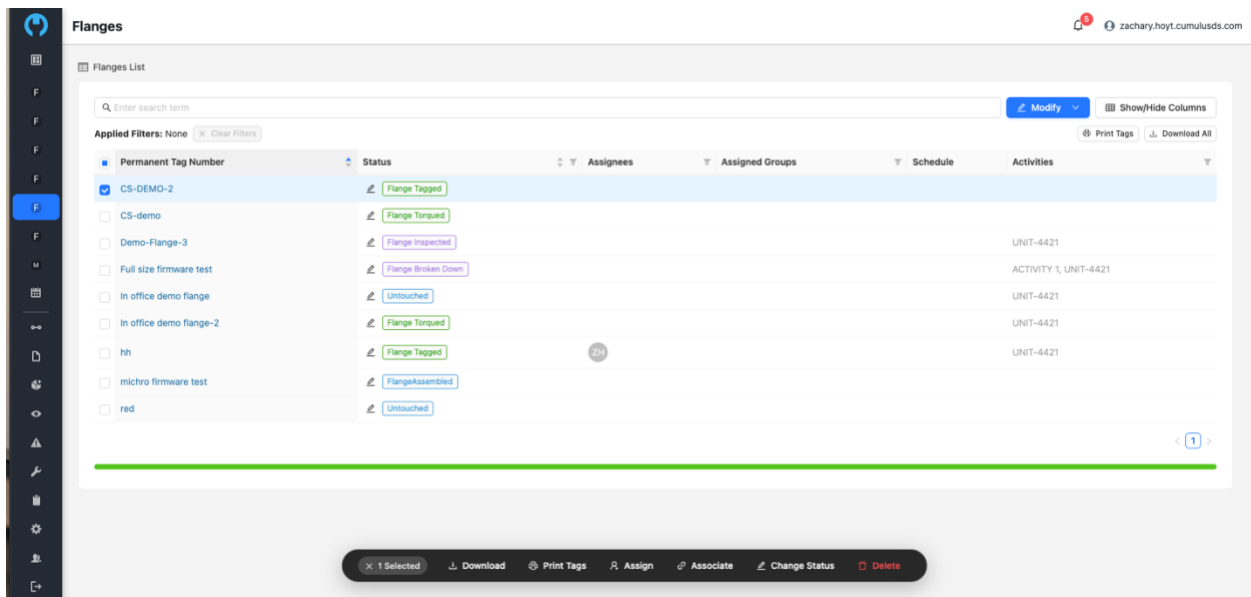


- Selecting the Submit button from this screen will then associate the assets, making them children of the current asset.
- Now you will see the assets selected as Associations within the overview screen



To add associations from the main index list:

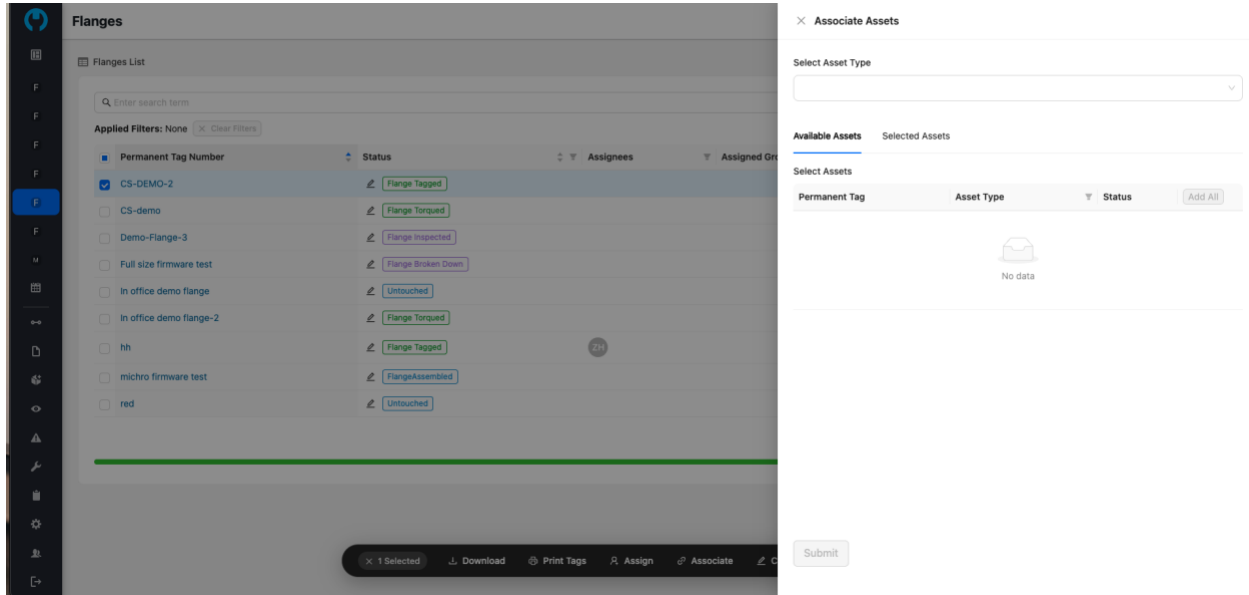
- First select the asset or assets with the “selector” boxes next to the asset names



- The action bar at the bottom of the screen that appears has a selection for associations. Select that



- Selecting that will then open a side pan that is the same as the UI utilized within the asset profile.



- Follow the steps from the section above for how the Associations pane functions.

Data Collection Tabs

Within CMA users can collect connected tool data in multiple ways:

- Torquing: Manual, Hydraulic, Tensioning or with other torquing tooling
- Electrical Testing: DLRO (digital low resistance) and IR (Insulation Resistance)
- Pressure Testing

Each type of connected work gives you a different view on the index page.

Torquing

When Torquing an Asset in Cumulus users will get down to the bolt and pass information presented to them in three different ways within the index page. The overview, effective torque table, and in the histories tab. This view will remain the same for all torquing operations.

Overview

On the overview screen A dynamic SVG that matches the bolt pattern in the field will provide users with quick snapshot of the torquing from the field.



Connections zachary.hoyt.cumulusds.com

Piping Class: 11011 Flange Size: 1

Effective Torque Summary

Pass Name	Planned Torque	Actual Torque (range)
Pass One	67.0 lbf-ft	67.0 - 67.0 lbf-ft

● Over Torqued ● Torqued Above Tolerance ● Torqued Within Spec ● Unstarted

Associations

[Edit](#)

Permanent Tag	Job Type	Status
CS-demo	Flanges	Flange Torqued

Effective torque table

The Effective torque table is the most in-depth view a user can view for their torquing information captured from the field. The effective torque table will render in a dynamic SVG of the exact bolting pattern used in the field. It will show the pattern for each pass, the target torque, the actual applied torque from the field, and a time stamp of when each torque was captured. Toggling from pass to pass will show this information for that specific pass taken by the CMA user.

Connections zachary.hoyt.cumulusds.com

Connections List / HADAR-SVG-TEST-6BOLT Ticket Unouched

Overview **Pass One**

Specifications: Required Torque: 67.0 lbf-ft

Pattern Number	Target Torque	Actual Torque	Bolt Status	Created Time Stamp
1	67.0 lbf-ft	67.0 lbf-ft	Torqued Within Spec	October 18th 2024 3:22:02 pm (CDT)
2	67.0 lbf-ft	67.0 lbf-ft	Torqued Within Spec	October 18th 2024 3:22:05 pm (CDT)
3	67.0 lbf-ft	67.0 lbf-ft	Torqued Within Spec	October 18th 2024 3:22:08 pm (CDT)
4	67.0 lbf-ft	67.0 lbf-ft	Torqued Within Spec	October 18th 2024 3:22:13 pm (CDT)
5	67.0 lbf-ft	67.0 lbf-ft	Torqued Within Spec	October 18th 2024 3:22:22 pm (CDT)
6	67.0 lbf-ft	67.0 lbf-ft	Torqued Within Spec	October 18th 2024 3:22:30 pm (CDT)

● Over Torqued ● Torqued Above Tolerance ● Torqued Within Spec ● Unstarted

History



As covered previously they history tab will display a dynamic SVG of the bolting pattern in the exact way the widget from the overview does. A quick snapshot into what was captured from the field, along with all other actions taken during that step.

The screenshot shows the 'Connections' page in the Cumulus interface. The main content area is titled 'Torque Summary' and contains a table with the following data:

Pass Name	Planned Torque	Actual Torque (range)
Pass One	67.0 lbf-ft	67.0 - 67.0 lbf-ft

Below the table is a legend: Over Torqued (red dot), Torqued Above Tolerance (yellow dot), Torqued Within Spec (green dot), and Unstarted (grey dot). Underneath is a diagram of a hexagonal bolting pattern with six numbered green hexagons (1-6) arranged in a circle on a grid background.

Below the diagram is the 'Tool Kits' section, which lists 'KIT 1' and 'Tightened using a Smart Wrench'. It also provides the 'Model Name: Snap-on 650 N-m' and 'Serial Number: 50f1f9c1-4c3e-493f-b394-d2b95e80d6d3'.

At the bottom of the interface, there is a status bar showing 'Untouched | rylan.filter completed operation Test SVGs' and a 'View Report' button.

Electrical Testing

Cumulus offers two different electrical testing suites to be conducted from CMA. Insulation Resistance testing and Digital Low Resistance testing, both being performed with a connected tool. Just like before with the torquing this captured data is shown in three different places within the asset profile. The overview, the Insulation Resistance table, and the in the history.

Overview

In the overview when an electrical test has been performed on CMA a testing table for that respective type of test will populate. The quick snapshot of the testing table will show all information about the test conducted, each pair that was tested, what was captured from the test and whether it failed the test.



Circuit zachary.hoyt.cumulusds.com

Completion Report: 1.0 min, 2
Number of Neutrals: 0, Number of Grounds: 1
History: 0
Insulation Resistance Table: From Location: PTX, To Location: BUSWAY

Insulation Resistance Testing

Meg Test

Target Resistance	Required Voltage	Target Resistance Lower Limit
500.00 MΩ	1.00 kV	500.00 MΩ

Measured Resistance	Measurement	Test Voltage	Duration	Status
492.00 GΩ	A-B	1.02 kV	1m 0s	Pass
205.00 GΩ	A-G1	1.02 kV	1m 0s	Pass
474.00 GΩ	B-G1	1.02 kV	1m 0s	Pass

Associations

[Edit](#)

Permanent Tag	Job Type	Status
PTC-0012	Electrical Equipment	TerminatedAndTorqued
PTC-0010	Electrical Equipment	TerminatedAndTorqued
PTC-0024	Electrical Equipment	TerminatedAndTorqued

[Cable Pulled](#)
Justin Wolf completed Cable Pulling operation on January 19th 2026, 12:39:33 pm (CDT)

Electrical Testing table

In the electrical testing users will get the most in depth view of the Electrical test conducted from CMA, and all recorded information from that test. All information about the test, each pair individually more in depth. This view will also show the duration for each pair, weather it passed or failed, and a time stamp for the test on each pair.

Circuit zachary.hoyt.cumulusds.com

Circuit List / PTC-0007 Cable Tested

Overview

Specifications

Workflows

Completion Report

History

Insulation Resistance Table

Test 1 Pass

Target Resistance	Required Voltage	Overall Status
500.00 MΩ	1.00 kV	Pass

Test Voltage	Target Resistance Lower Limit	Minimum Duration Required
1.02 kV	500.00 MΩ	1m 0s

Total Execution Time: 11m 34s

Phase To Phase

Measured Resistance	Status	Measurement	Minimum Duration Met	Timestamp
492.00 GΩ	Pass	A-B	⊙ (1m 0s)	January 20th 2026 3:29:05 pm

Phase To Neutral

Measured Resistance	Status	Measurement	Minimum Duration Met	Timestamp
No data				

Phase To Ground

Measured Resistance	Status	Measurement	Minimum Duration Met	Timestamp
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History

Within the history tab the Electrical Testing widget will show the exact same information as the overview page, along with all the other information about actions taken within that step of the workflow.



Circuit | February 26th 2026, 12:15:29 pm (CDT) | Electrical test | zachary.hoyt.cumulusds.com

History

Insulation Resistance Table

Activities

Electrical Testing

Meg Test

Target Resistance	Required Voltage	Target Resistance Lower Limit
500.00 MΩ	1.00 kV	500.00 MΩ

Measured Resistance	Measurement	Test Voltage	Duration	Status
629.00 GΩ	A-B	1.02 kV	1m 0s	Pass
842.00 GΩ	A-G1	1.02 kV	1m 0s	Pass
687.00 GΩ	B-G1	1.02 kV	1m 0s	Pass

Tool Kits

Insulation Resistance Testing Kit

Model	Serial Number	Calibration
MIT525/2-102605325	102605325	

Checklist Answers

Is the system de-energized and isolated?
Yes
Zachary Hoyt | June 25, 2026

Are all equipment connections disconnected prior to testing?
Yes
Zachary Hoyt | June 25, 2026

Has LOTO been verified and is in place?
Yes
Zachary Hoyt | June 25, 2026

Has the water spill test been performed successfully after testing?

Pressure testing

Pressure testing in CMA is completed by utilizing one of the Bluetooth connected gauges. Allowing users to seamlessly pressure up pipe, vessels, voids and more to collect essential testing data seamlessly. Pressure Testing unlike torquing and electrical testing that show strictly data captured Pressure testing renders to users the full graph and life of the test itself, this is surfaced in two different lactations to the users: Overview, and in the history.

Overview

In the overview an interactive widget will give users the ability to hover over the graph to see the captured pressure at any point, the target pressure, and the recorded temperature over the full life of the test.

Test Packs | zachary.hoyt.cumulusds.com

Associations

Images

Operating Pressure: N/A psi | Test Medium: N/A

Assignment

Assignees: [User Icon] | Assigned Groups

Phase 1

Pressure Loss/Gain: **↑ 28.09 psi**

Test Passed
Completed by Melissa Ortega on December 11th 2025, 2:08:48 pm (CDT)

Associations

Edit

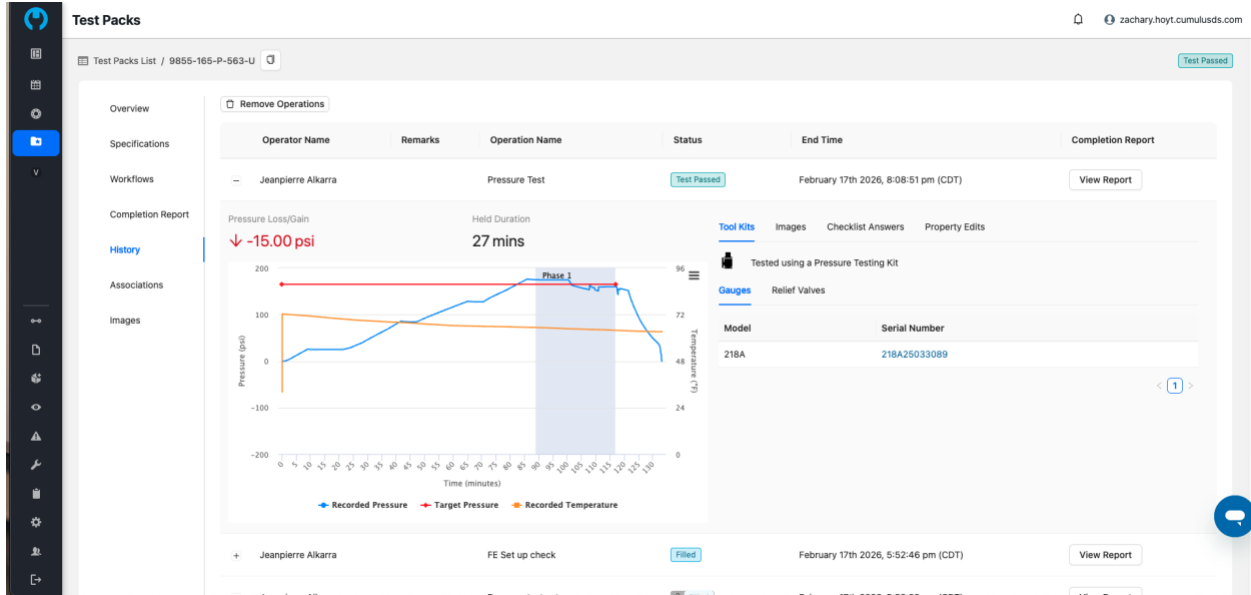
Permanent Tag | Job Type | Status

- Tested: Melissa Ortega completed Pressure_test_set_up operation on December 11th 2025, 12:28:28 pm (CDT)
- Setup Complete: Melissa Ortega completed Construction_Pre-Checks operation on December 11th 2025, 12:21:27 pm (CDT)

History



In the history tab users can view the same interactive graph widget as they do on the overview screen, along with the tool kit utilized for the test, and all other actions taken during the step of the workflow.



Modifying Assets

Asset data in Control Center is very flexible, Within an asset the properties, status and history can be changed as users see fit. We have covered how to import data, how data for an asset is edited from the specifications page and how to view and change histories. This data can be updated in bulk from the index list screen:

- First use the “Selection” boxes next the asset names. Be sure to only select the assets you wish to update. (to select the whole page of assets, utilize the “selector” box next to the column title “Permanent Tag Number”)
- After your assets are selected the action bar will show at the bottom of the screen. Select download.



- This will download you a copy of the assets as they sit in the system currently.
- On this spread sheet you will see all information as if you were doing a bulk upload into the importer. Make any edits necessary before saving the sheet for re-upload.
- When you are ready for upload, we are going to follow the same process as before, covered in the bulk import portion of this document.

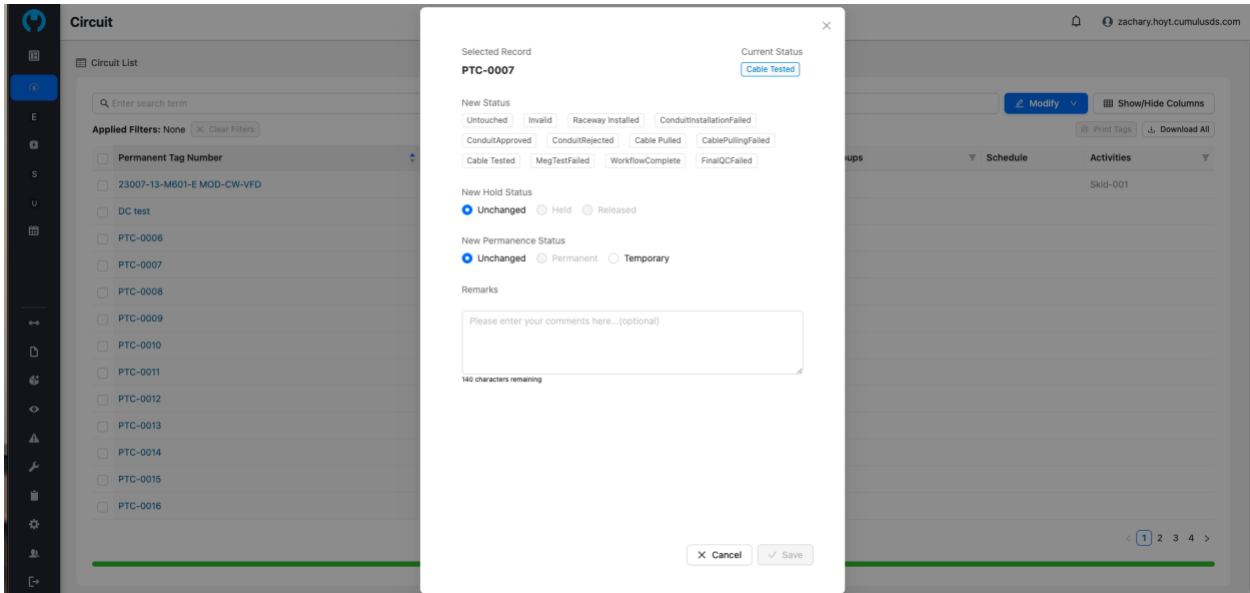
Assets Can also have their statues updated to administratively push them to any section of the workflow. This is accomplished two ways:

The status editor is in the Asset index list and is represented with a pencil icon. The status editor is a really good resource if you are doing one by one or a single asset status update.

- First select the pencil icon next to the asset type you wish to update.



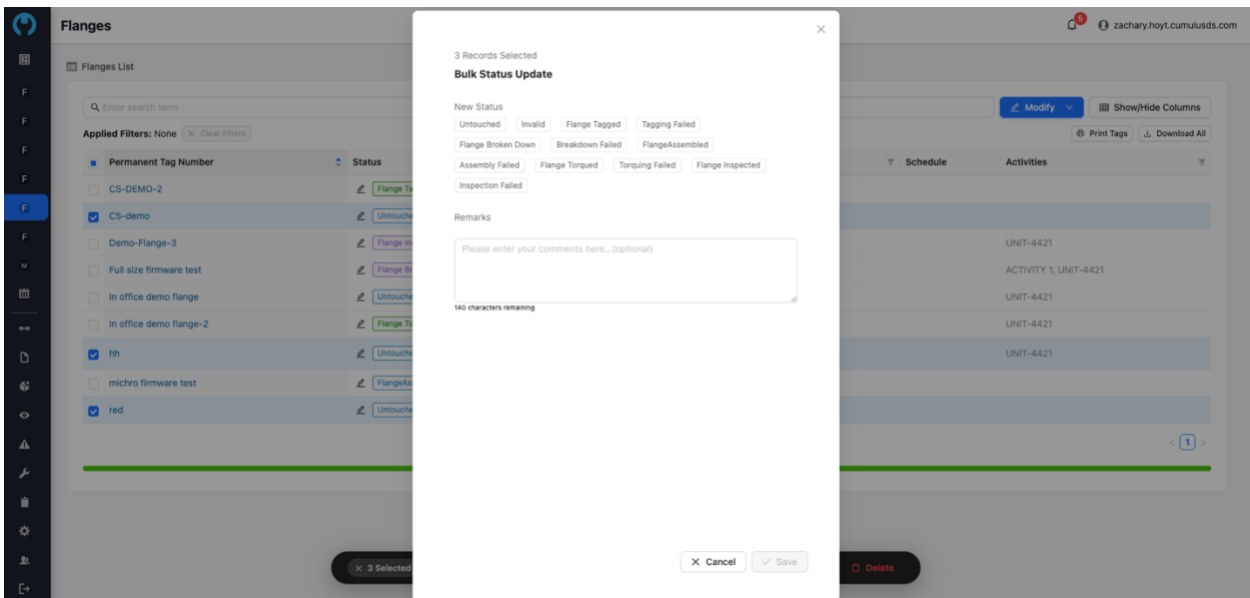
- A pop out window will open with options for users to select a new status for the asset, put the asset into a hold status requiring unlocking later, or change the assets permanence for tracking temporary bolt ups.



- After making the desired selections users must input something in the remarks window, only then will the save button become available
- After completing a status update a history record will be entered for the edit

Users can also perform a bulk update of status by using the action bar. Same as before use the “selector” box to grab all assets desired to update.

- The action bar will populate at the bottom, select the “change status” button to proceed
- A pop up will appear allowing users to push the selected assets to which ever status they would like





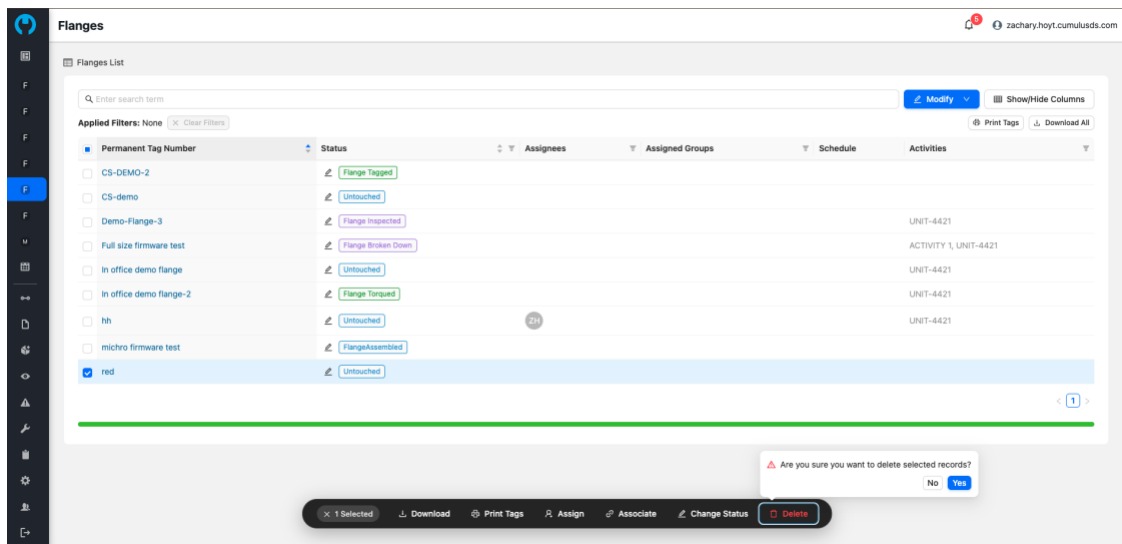
- After clicking the save button the progress bar will run, and all statuses will move to the selected one
- And an history record will be created with the action that took place.

Deleting/Decommissioning an asset

In Control Center Users can correct mistakes by utilizing the delete button. However, in Cumulus No data is truly deleted, instead we do a decommissioning. This means we remove the asset from dashboard counts, the index screen, CMA, and it is no longer visible to the user at any time.

To delete an asset type:

- First use the selector boxes off to the left to pick the desired assets.
- On the quick action bar select delete and acknowledge the warning

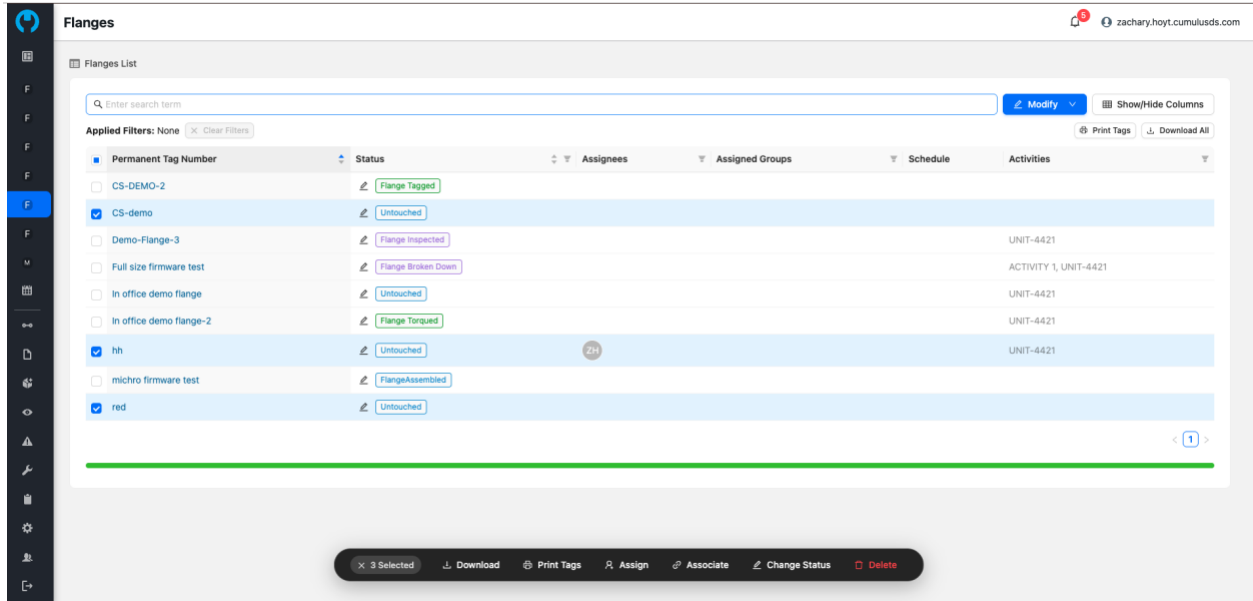


- When deleting here is what happens, the asset is no longer surfaced throughout the entire system to the users. We automatically append a value to the asset name so the name can be reused.
 - To bring back any decommissioned asset a support ticket to support@cumulusquality.com must be entered.

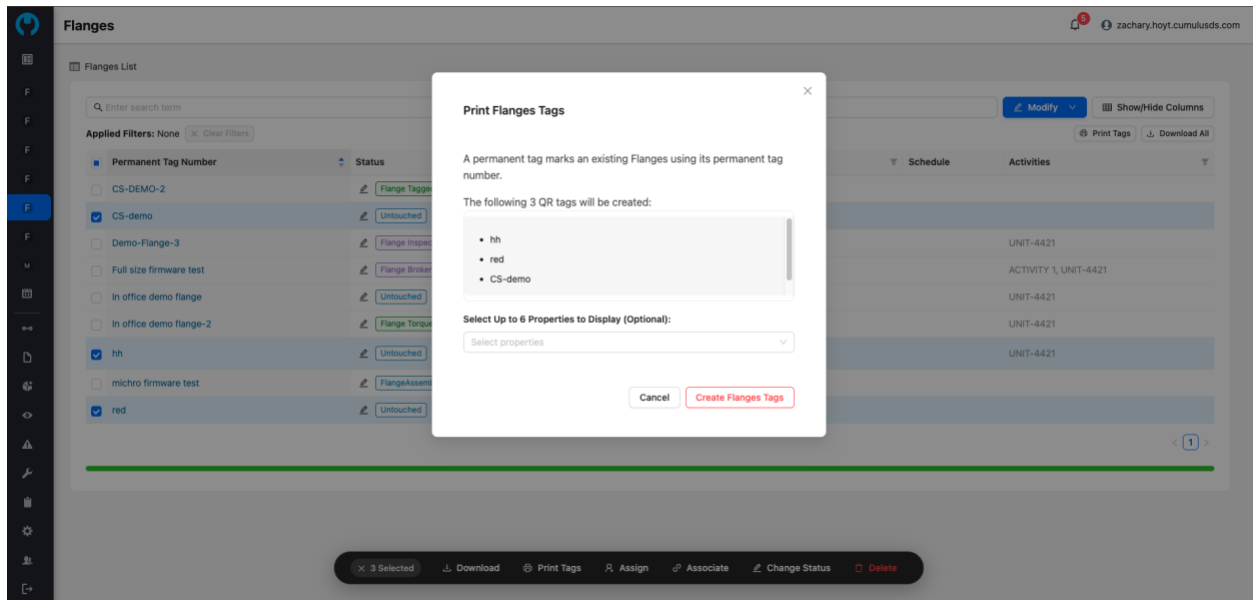
Printing Asset Tags

Within the Cumulus Mobile App users are given a ton of different option to search, filter, and group assets to find a particular asset they need to do work against. One of these options is scanning an asset generated QR code. This acts like a flange tag, or an asset identifier. Tags can be templated and created with any data a user selects.

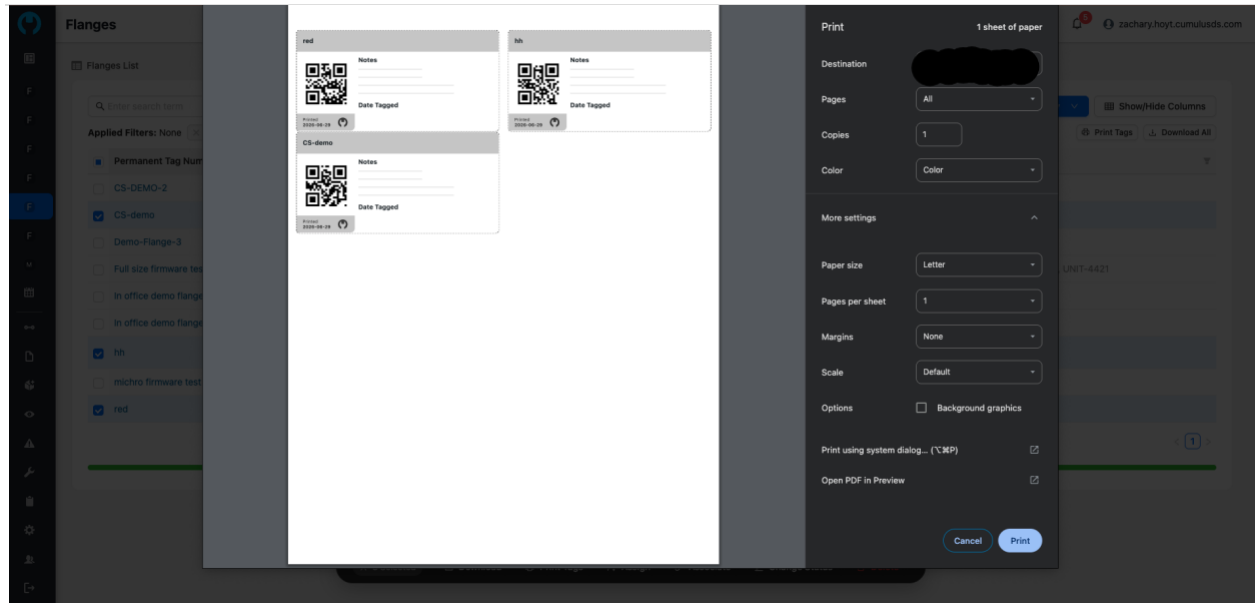
- First start by using the selector boxes on the side next to the asset names
- Then we surface two the “Print tags” button at the top of the screen under the modify button, and there is a “Print tags” button in the quick action bar



- When you select one of the “Print tags” button a dynamic pop up will show labeled “Print (Asset Type name) tags”



- You should see a preview window with all the selected assets chosen, along with a drop down to pick what properties from this asset desired on the tag
 - Users can select up to 6 different properties for the asset tag
 - The selection of properties persists for the next time a user wishes to print tags
 - Tags are unique to each asset type, and do not persist across them
- When ready select generate tags. A PDF will populate for you to print out.
 - The best settings for printing tags are to first run off all margins
 - Set the paper size to letter



SUPPORT

If you have questions about Asset Types, the Index, or Data Builder, contact Cumulus Quality support.

- **Email:** support@cumulusquality.com
- **Subject line format:** Control Center — Asset Index — [brief description of issue]

For information on other Control Center tabs, refer to the relevant section of the Cumulus Control Center Guide.