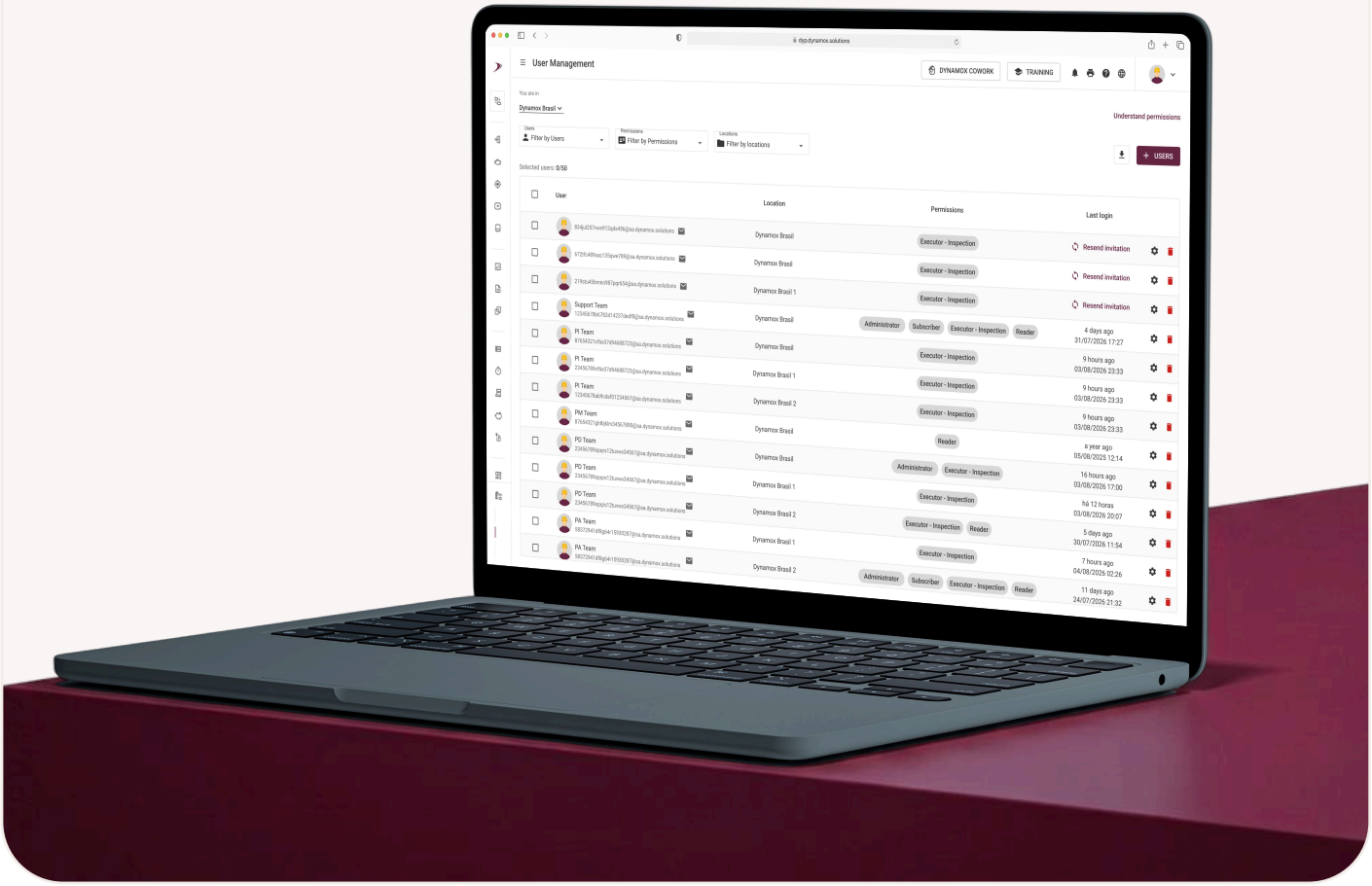
Dynamox

USER MANUAL

Initial Setup on the Dynamox Solution



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1 User management

User Management is a dedicated module within the Dynamox Platform designed to govern access, define user capabilities, and pinpoint exactly where these privileges apply across the asset tree. This feature streamlines the onboarding of new users while empowering administrators to seamlessly review and optimize permissions for existing workspace members.

Within the Dynamox Platform, access management is structured around three core concepts foundational to this module:

- **User:** An individual identified by a corporate email. A single user can hold distinct roles across different levels of the Asset Tree.
- **Permission:** A predefined set of actionable rights assigned to a user (e.g., creating machines, viewing the Dashboard, or triggering remote commands via the DynaGateway). Seven distinct permissions are available, as detailed in Chapter 1.2.
- **Location:** The specific node within the Asset Tree where a permission applies—whether a workspace, subarea, machine, component, or Spot. A single permission can be scaled across multiple locations simultaneously.

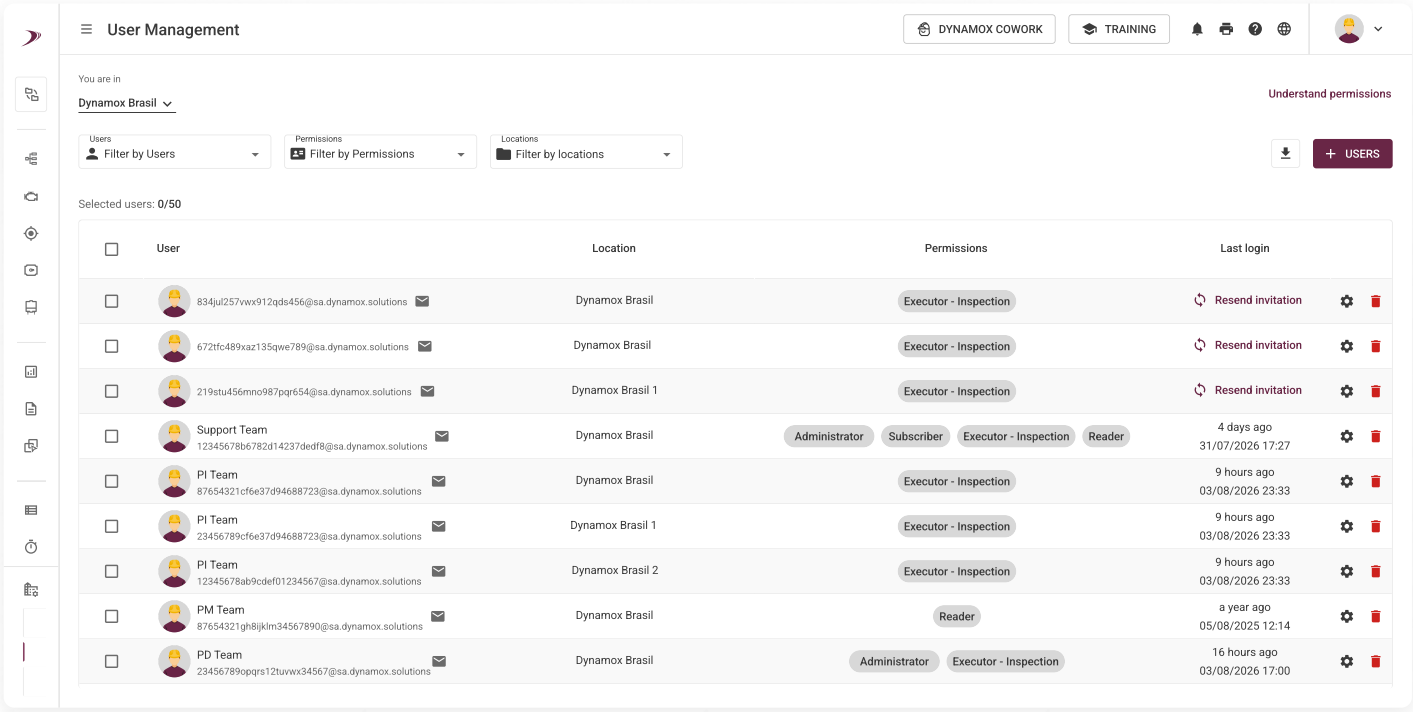
> ⓘ Permissions are systematically granted as a **(user, location)** pair. Operating at this granular level allows a single email address to populate multiple rows within the user list, dedicating a distinct entry to each authorized location.

The subsequent chapters break down the User Management interface (1.1), detail the scope of each permission profile (1.2), and guide administrators through the three-step onboarding wizard for new users (1.3). Finally, they outline the workflows to edit, resend invitations, or remove active members (1.4 to 1.6).

1.1 Page overview

To access User Management, log in to the platform at **https://dyp.dynamox.solutions/** and navigate to **Administration** > **User Management** via the left-hand menu. This interface displays the comprehensive user directory for the active workspace.

Positioned just below the title, the **You are in** field displays the active workspace (e.g., **Dynamox Brazil**) and doubles as a selector to seamlessly switch between environments. The workspace defined here governs the scope of all actions detailed throughout this section.



The interface is structured into three primary areas:

- **Filter Header:** Houses the **Filter by Users**, **Filter by Permissions**, and **Filter by Locations** fields to streamline the directory based on targeted attributes. On the far right, the ⬇ icon exports the active list to a CSV file, while the + USERS button triggers the onboarding wizard outlined in 1.3.
- **Selection Counter:** The **Selected users: 0/50** indicator tracks active checkboxes, limiting bulk operations to 50 users at a time.
- **User Table:** Dedicates a distinct row to each (user, location) pair. Columns display the **User**, **Location**, **Permissions**, and **Last login**, with each entry concluding with the ⚙ and 🗑 icons.

1.1.1 Column meanings

- **User**: The invited user's email address. Addresses ending in **@sa.dynamox.solutions** designate service accounts or integrations, rather than human users.
- **Location**: The specific node within the Asset Tree where the permission applies. This spans from the root workspace (e.g., **Dynamox Brazil**) down to a targeted subarea (e.g., **Dynamox Brasil 1**).
- **Permissions**: The profiles assigned to the user at that specific node, rendered as UI chips. A single user can hold multiple profiles concurrently within the same location.
- **Last login**: The approximate timestamp of the most recent session. For pending invitations, this column surfaces the ↻ **Resend invitation** button (detailed in 1.5).

1.1.2 Action icons per row

- **Gear icon**: Launches the onboarding wizard directly at step 2, with the user and location pre-populated. This provides a streamlined shortcut to adjust permissions for that specific pair, bypassing the initial email search. Detailed in 1.4.
- **Trash icon**: Revokes the user's access from that specific location. Any permissions held across other nodes within the Asset Tree remain fully active. Detailed in 1.6.

> ⓘ The **Understand permissions** link in the top right corner triggers a side panel outlining the seven profiles and the specific capabilities they grant. Section 1.2 fully consolidates these details.

1.2 Understanding permissions

The Dynamox Platform categorizes access across seven permission profiles, strategically designed to encompass the full spectrum of industrial asset health management—from top-level administration and data analysis to field inspection, installation, and read-only monitoring. Each profile unlocks a fixed set of capabilities tied to specific platform resources (Machines, Spots, DynaGateway, Checklists, Routes, Reports, among others).

Triggering the **Understand permissions** link in the top right corner unveils a side panel detailing the exact capabilities granted by each profile across these resources. The following pages fully consolidate these technical specifications.

> Profiles are fully **stackable**: a single user can be assigned multiple permissions within the same location (e.g., **Editor** + **Inspection Executor**). The resulting access level aggregates all capabilities granted by the assigned profiles.

1.2.1 Administrator

Full control over the assigned location. Tailored for leaders driving platform configuration and overseeing comprehensive team management.

- **Workspace:** Create, Edit, Delete, View, Move, View user roles, Manage user roles, Remove user roles, Assign user roles.
- **Users:** Create, Edit, Delete, View.
- **Machines:** Create, Edit, Delete, View.
- **Spots:** Create, Edit, Delete, View, Move.
- **DynaGateway:** Edit, View, Adopt, Unadopt, Execute remote commands.
- **Reports, Analysis Plans, Checklists, Routes:** Create, Edit, Delete, View.

1.2.2 Subscriber

Designed for automated notification delivery with strictly read-only access. Ideal for managers focused exclusively on monitoring alerts.

- **Machines:** View, Receive alerts.

1.2.3 Collector

Designed for field data collection, leveraging DynaGateway support and report generation for assigned machines.

- **Machines:** Edit, View.
- **Analysis Tools:** View.
- **Reports:** Create, Edit, Delete, View.
- **Dashboard, Workspace, Users:** View.
- **DynaGateway:** Execute remote commands.

1.2.4 Editor

Functions as a technical administrator, empowered to configure Machines, Spots, DynaGateways, Checklists, Routes, Reports, and Analysis Plans. This profile excludes user management and workspace creation or deletion capabilities.

- **Machines, Spots, Checklists, Routes, Reports, Analysis Plans:** Create, Edit, Delete, View.
- **Workspace:** Edit, View, Move.
- **DynaGateway:** Edit, View, Adopt, Unadopt, Execute remote commands.
- **Dashboard, Users:** View.

1.2.5 Installer

The most restrictive profile, tailored for technicians requiring strictly read-only visibility into the structure to support physical device installations.

- **Machines, Workspace:** View.

1.2.6 Executor - Inspection

Designed for inspectors executing field routes via the Dynamox App. Empowers users to fulfill assigned routes and log reports, while maintaining read-only visibility into the underlying support structure.

- **Routes:** View.
- **Reports:** Create, Edit, Delete, View.
- **Machines:** Edit, View.
- **Dashboard, Workspace, Users:** View.

1.2.7 Reader

A strictly read-only profile. Ideal for managers and auditors requiring data consultation capabilities without any editing privileges.

- **Machines, Analysis Tools, Reports, Dashboard, Workspace, DynaGateway, Analysis Plans, Users:** View.

1.2.8 Comparative summary

The table below summarizes the access levels for each profile across key resources. CRUD denotes Create, Edit, Delete, and View.

PROFILE	MACHINES	SPOTS	DYNAGATEWAY	ROUTES	REPORTS	USERS
Administrator	CRUD	CRUD + Move	Total	CRUD	CRUD	CRUD
Subscriber	View + Alerts	-	-	-	-	-
Collector	Edit, View	-	Remote command	-	CRUD	View
Editor	CRUD	CRUD + Move	Almost total	CRUD	CRUD	View
Installer	View	-	-	-	-	-
Executor - Inspection	Edit, View	-	-	View	CRUD	View
Reader	View	-	View	-	View	View

1.3 Add new users

The process of onboarding new users and adjusting permissions for active members is driven by a three-step wizard, triggered via the + USERS button in the top right corner.

This wizard ensures administrators maintain full visibility over affected users, granted (or revoked) permissions, and targeted locations before committing any changes. The three stages comprise:

- **Select users:** Specify target users via email. Unregistered emails within the workspace receive a **New** badge and automatically trigger an email invitation upon process completion.
- **Configure:** Define which permissions to grant or revoke and designate their applicable locations. This stage supports both granular, case-by-case adjustments and bulk operations across all selected users.
- **Review:** Audit a comprehensive configuration summary before committing. This serves as the final checkpoint to cancel without deploying changes.

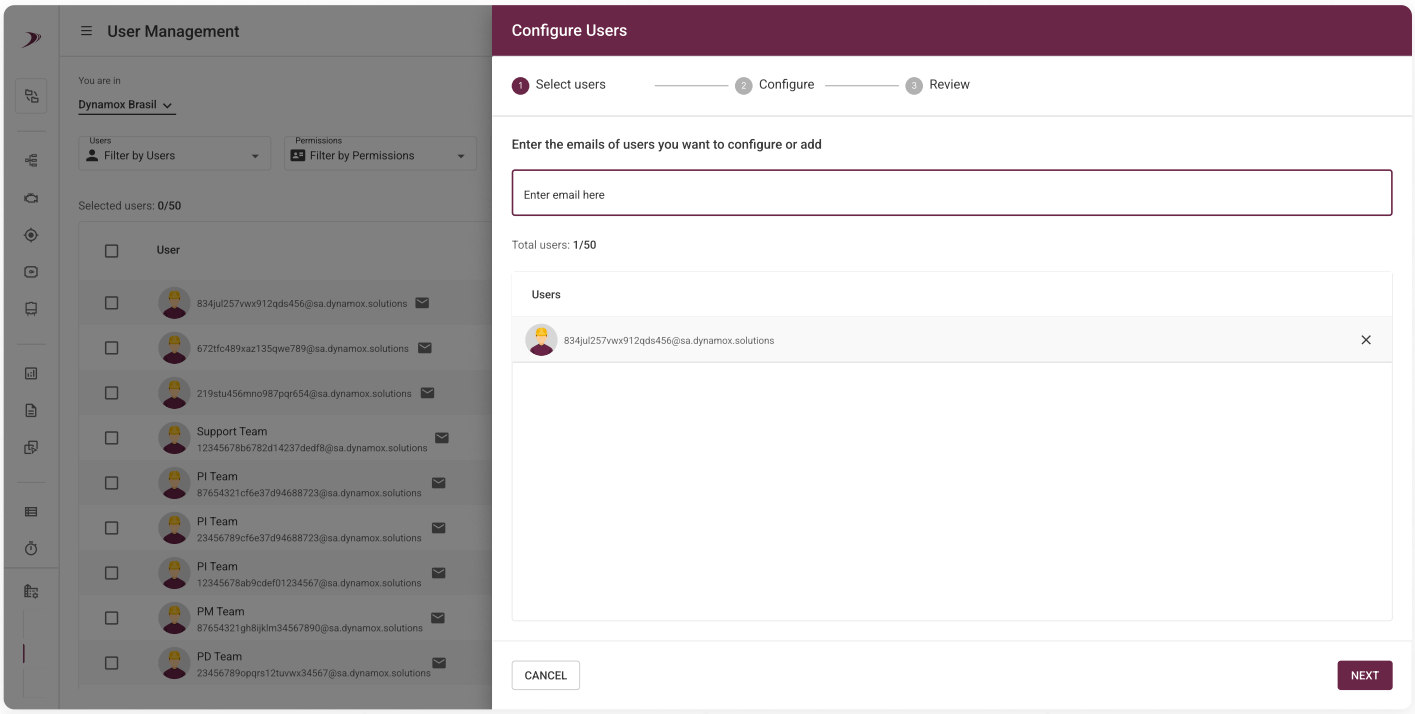
> Each operation is capped at **50 users** and, per user, **20 locations**. Larger deployments must be split into multiple batches.

At any time, the assistant can be interrupted by clicking CANCEL . As a safeguard, if unsaved changes exist, the platform prompts a confirmation dialog: "**Warning, Are you sure you want to leave without saving?**" with the options BACK (returns to the wizard) and EXIT (discards all data). No changes are applied until the user clicks CONFIRM in step 3.

1.3.1 Select users

In the initial stage, marked at the top of the panel, the wizard displays the **Configure Users** title alongside the prompt **Enter the emails of the users you wish to configure or add**. Directly below, a unified text field features the placeholder **Type the email here**.

To onboard or modify a user, input their full email address and press **Enter**. The system instantly renders the email as a UI chip in the list below, automatically updating the **Total users** counter (N/50 format).



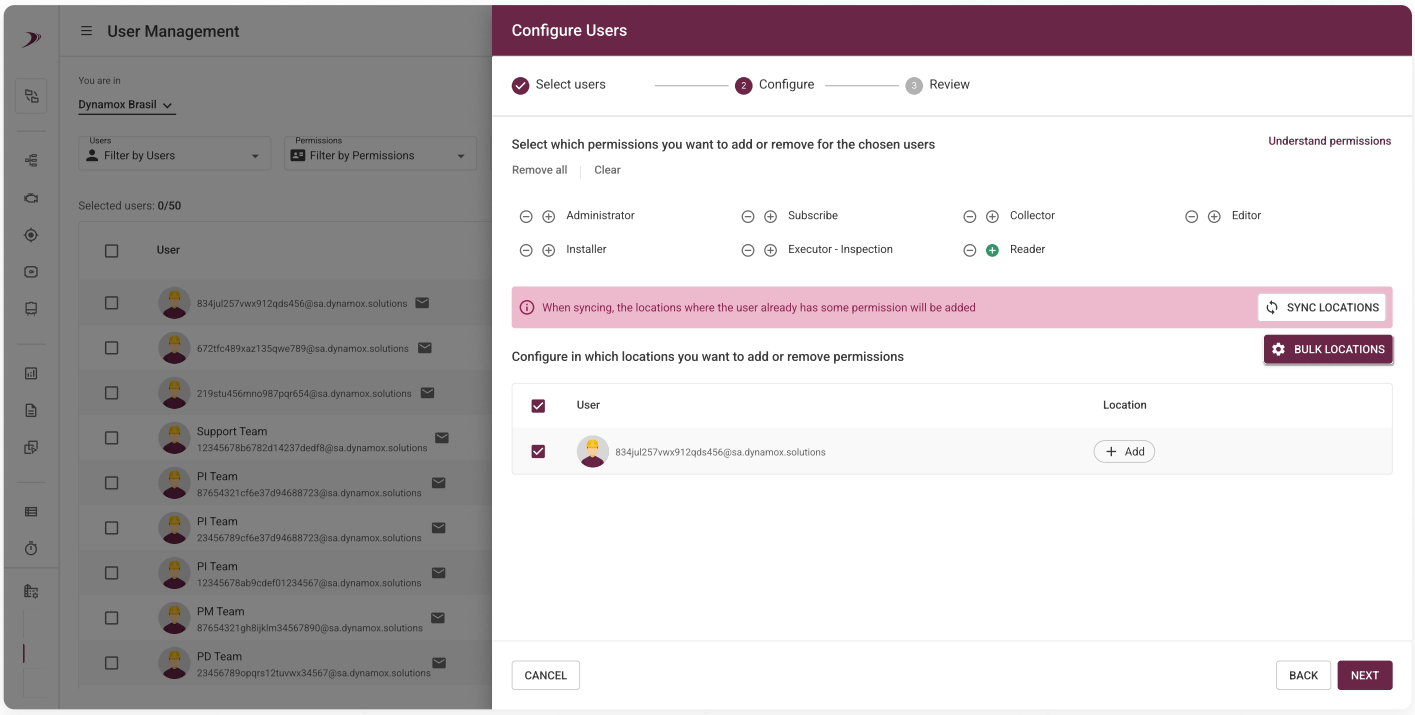
The platform automatically categorizes entered emails into two distinct visual states:

- **Without badge:** The user already exists somewhere within the workspace. Proceeding will strictly append or revoke permissions and locations.
- **With 'New' badge:** The email is currently unregistered. Committing the wizard automatically triggers an email invitation, empowering the individual to create an account and claim their access.

After adding all the emails, the user must click on ADVANCE in the bottom right corner to proceed to step 2.

1.3.2 Configure permissions and locations

The wizard's second stage features a dual-block architecture: a permission selector at the top and a location manager at the bottom. Operating completely independently, these modules empower administrators to grant permissions prior to assigning locations, or vice versa, ensuring maximum workflow flexibility.



1.3.2 Permissions block

Alongside each of the seven profiles (Administrator, Subscriber, Collector, Editor, Installer, Inspection Executor, and Reader), two circular toggles appear to the left of the name:

- **Remove button:** Turns red upon click, signaling that the profile will be **revoked** from the selected users across the designated locations.
- **Add button:** Turns green upon click, indicating that the profile will be **granted** to the users at the specified locations.

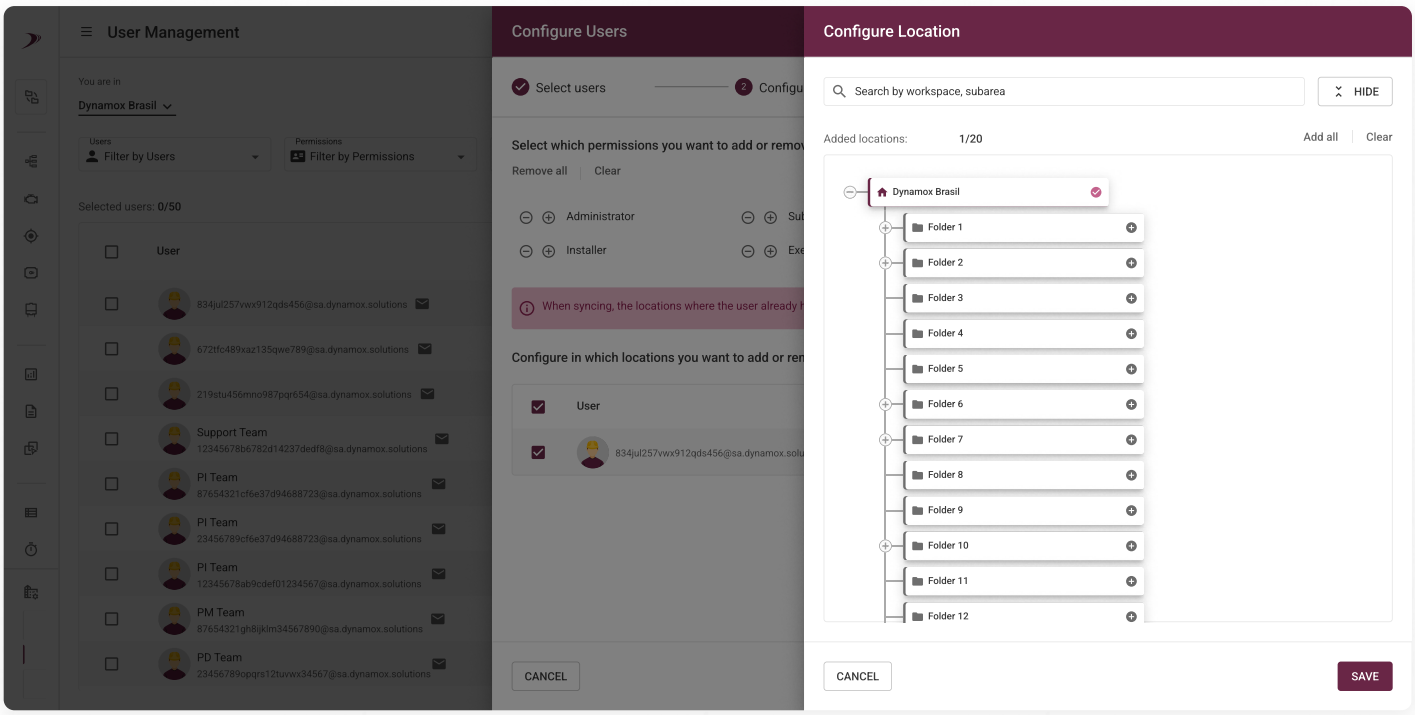
The top of the module features two text shortcuts: **Remove all** triggers the removal toggle for every profile simultaneously, streamlining bulk access revocation; **Clear** reverts all selections, resetting the stage state.

1.3.2.2 Banner Sync locations

Directly below the permissions, a pink banner displays the message **Upon syncing, locations where the user already holds permissions will be added**, positioned next to the SYNCHRONIZE LOCATIONS button . This shortcut optimizes the workflow for granting a new profile to an existing user, empowering administrators to seamlessly scale the new access level across all of the user's active locations without manual, one-by-one assignment.

1.3.2.3 Individual location configuration

Further down, the **Configure where you want to add or remove permissions** table dedicates a distinct row to each selected user, structured by **User** and **Location** columns. To define a user's scope, click the + Add button within the Location column (or the + icon that replaces it once UI chips are present). Triggering this action unveils the **Configure location** side panel on the right, displaying the comprehensive Asset Tree.



The tree is fully navigable: starting from the root (**Dynamox Brazil**), expand any node by clicking the button ⊕ to the left of the folder icon. To select a location, simply click the ⊕ button on the right; this action appends the location to the selection and dynamically updates the **Added locations: N/20 counter**.

At the top of the panel, the search bar **Search by workspace, subarea** filters the tree by name. To the right, the HIDE button hides all open branches. The **Add all** and **Clear** shortcuts bulk-apply or remove all locations from the current selection. Once configured, click SAVE in the bottom right corner to return to step 2 with the designated locations locked in.

> ⓘ Permissions apply to the chosen location and **cascade down to all its child locations**. Granting access to **Dynamox Brazil** (the root) effectively grants full access to the entire Asset Tree within that workspace.

1.3.2.4 Bulk locations

When configuring multiple users simultaneously to grant (or revoke) access to identical locations, the MASS LOCATIONS button located in the top right corner of the location block, triggers a panel nearly identical to the individual view, featuring two key distinctions:

- Each tree node displays **two** buttons: one to remove the location from all selected users, and another to add it. (The individual panel only supports additions).
- At the top, alongside **Add all** and **Clear**, a **Remove all** shortcut is also available.

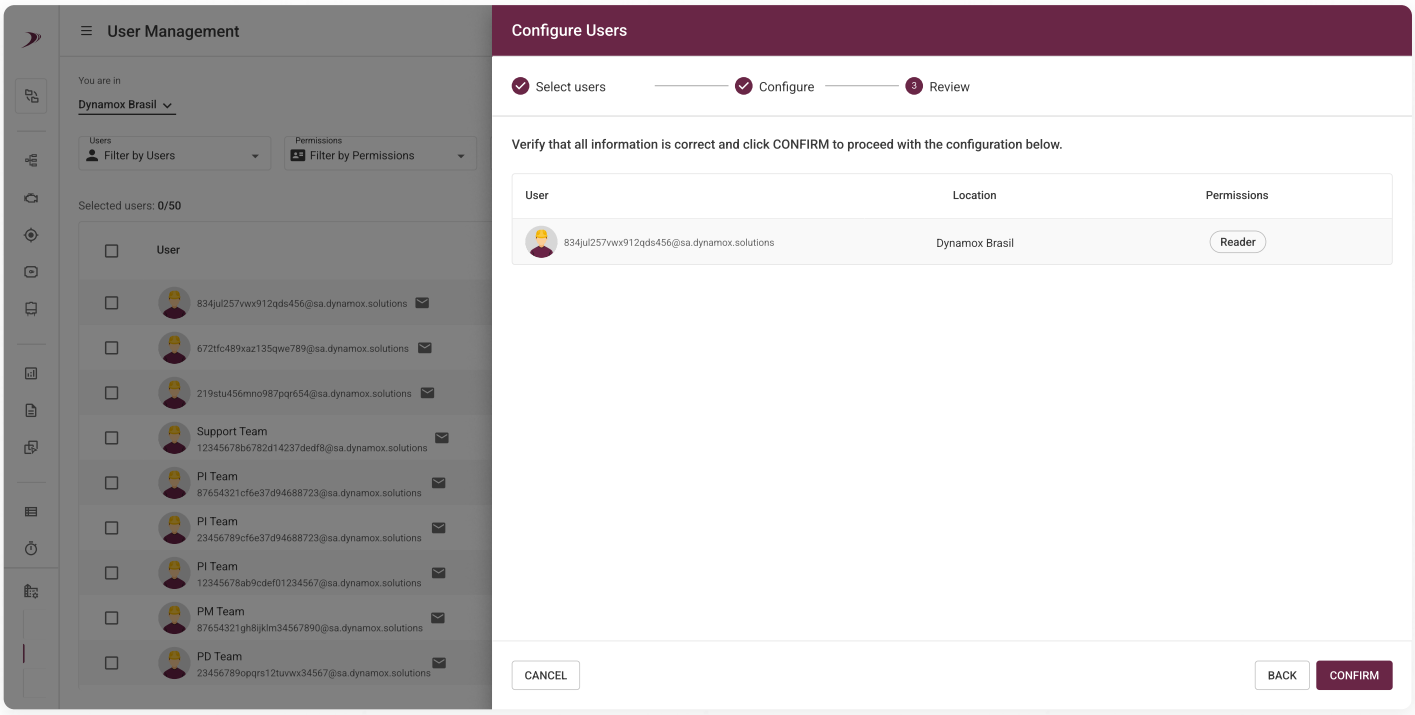
This bulk mode optimizes deployment in two primary scenarios: onboarding a large group of new collaborators requiring identical access (e.g., an entire inspection team for a specific plant), and simultaneously revoking access from multiple users (e.g., upon project completion).

1.3.2.5 Advancing to step 3

Once permissions and locations are fully configured for all target users, click ADVANCE in the bottom right corner of the wizard. The BACK button reverts to step 1 to adjust the email list if necessary.

1.3.3 Review and confirm

The third and final stage of the wizard delivers a comprehensive summary of all configurations defined in the preceding steps. The top-level prompt, **Verify that all information is correct and click CONFIRM to proceed with the configuration below**, serves as the ultimate checkpoint before deploying the changes.



The summary table dedicates a distinct row to each (user, location) pair, structured by the **User**, **Location**, and **Permissions** columns. Assigned permissions are rendered as UI chips, while revoked profiles are visually flagged in red.

To rectify any discrepancies, click BACK to return to step 2 and adjust the parameters. Once fully validated, clicking CONFIRM deploys the configuration: new users automatically receive an email invitation, while modifications to active members take effect immediately.

> Invitations are routed to the provided email address. Invited users must check their inbox and spam folders to complete the registration via the provided link. For pending invitations, administrators can trigger a fresh email by clicking the **Resend invite** button directly from the main user directory (see 1.5).

1.4 Edit permissions of an existing user

To review or change the permissions of a user already on the list, the user must locate the row corresponding to the pair (user, location) that will be modified and click the icon ⚙ to the right of that row. The same assistant described in 1.3 is opened, but with two differences that make the process more straightforward:

- **Step 1 is already completed:** the assistant opens directly at step 2, with the chosen user pre-selected in the list and the corresponding location already marked as a chip in the Location column. This avoids repeating the email search.
- **Bulk Locations button disabled:** since this is a single-user operation, the bulk shortcut is grayed out and cannot be clicked. The locations need to be added and removed using the individual controls of the row (+ Add) to open the tree panel and ⊗ inside each chip to remove it).

From this point, the workflow mirrors sections 1.3.2 and 1.3.3: assign or revoke profiles using the ⊕ and ⊖ toggles, adjust locations as needed, and proceed to step 3 via the ADVANCE button. After auditing the summary, click CONFIRM to deploy the changes.

> ⓘ Because the ⚙ icon is tied to a specific table row, it exclusively edits that exact (user, location) pair. To scale a single user's access across multiple locations simultaneously, trigger the full wizard via + USERS . Simply input the existing email in step 1 (it will appear without the New badge) and leverage the ⚙ BULK LOCATIONS shortcut in step 2.

1.4.1 Add a new location to an existing user

To grant an existing user access to a new location, follow the standard onboarding workflow: click + USERS , input their email in step 1 (which will appear without the **New** badge, confirming their active status), and proceed through the wizard. In step 2, the ↻ SYNCHRONIZE LOCATIONS shortcut optimizes the process by automatically retrieving all nodes where the user already holds permissions.

1.4.2 Resend invitation

When a guest user has not yet accepted the email invitation, the **Last login** column in the list displays, instead of the date, the button **Resend invitation** Clicking this button immediately sends a new email to the registered address, with the updated acceptance link.

This feature is useful in three common situations: the original invitation expired before the user accepted it, the email ended up in the spam folder and the user did not notice, or there was a delay in receiving it and the link is no longer valid. Resending does not change the permissions or the already configured locations; only the acceptance link is regenerated.

1.5 Remove user from a location

To revoke a user's access from a specific location, locate the corresponding (user, location) row within the main directory and click the on the far right. This action purges the row from the list, instantly invalidating all associated permissions for that specific node.

> The icon **does not delete the user from the platform** nor change their access in other locations. To remove the user from multiple locations at once, you need to repeat the action on each corresponding row, or use the bulk assistant via + USERS marking the profiles to remove with the button .

1.5.1 Best practices when removing access

- Prior to revocation, verify that the user is not the sole **Administrator** of the workspace. A workspace devoid of administrators temporarily locks all management capabilities until a replacement is designated.
- In cases of permanent offboarding (e.g., contract termination), systematically revoke the user from **all** locations to ensure total platform access is neutralized.
- When strategically adjusting an access scope (e.g., role transitions), selectively revoke only the obsolete locations while maintaining the relevant active nodes.

2 Asset tree

The Asset Tree is the hierarchical representation of the physical structure monitored on the Dynamox Platform. In it, the user organizes workspaces, sub-areas, machines, subassemblies, components, and monitoring points (Spots) that make up the operation. It is the foundation upon which all other modules operate: permissions (chapter 1) apply by location in the tree, sensor data collections are linked to Spots, and inspection routes and checklists are associated with machines and components.

The tree is organized into a hierarchy of types, each with a specific color and function:

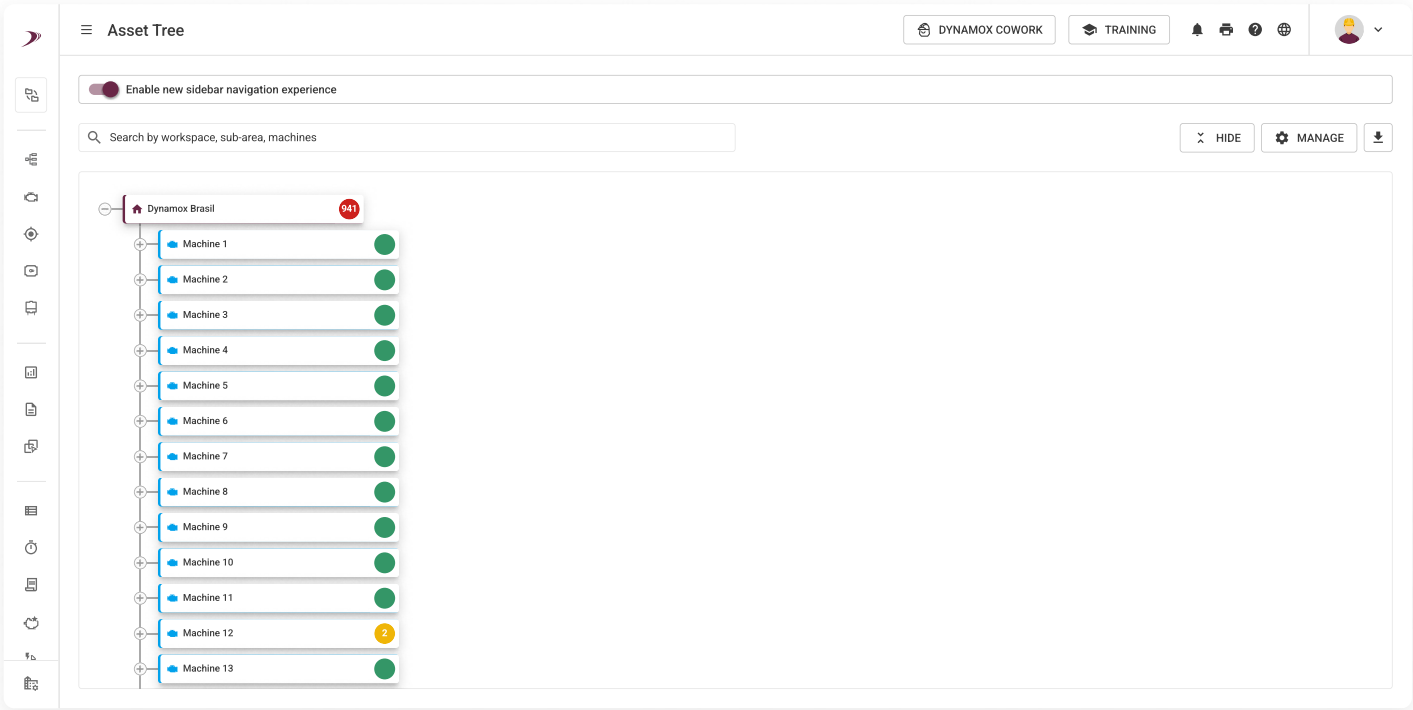
- **Workspace:** the root node representing the company or client (house icon). Every tree starts with a workspace;
- **Folder (Sub-area):** an organizational grouper within the workspace. It can represent a plant, a unit, a production line, or any logical division;
- **Machine:** the main asset (motor, pump, fan, reducer). It concentrates operational information, sensors, and history;
- **Subassembly:** an internal division of the machine (for example, "motor" or "reducer");
- **Component:** a specific part that belongs to a subassembly, representing a subdivision (for example, a bearing);
- **Monitoring Point (Spot):** the physical location where measurement data is collected by an installed sensor.

> ⓘ The tree structure directly reflects the organization of the plant. A well-modeled tree facilitates indicator analysis, delegation of responsibilities by location, and the setup of inspection routes consistent with the physical layout.

The following subsections cover, in order, the page layout (2.1), the hierarchy logic (2.2), how to create each type of item (2.3), how to edit, move, and delete existing items (2.4), and how to search and export the tree (2.5).

2.1 Page overview

To access the Asset Tree, the user must log into the platform **https://dyp.dynamox.solutions/** and, in the left sidebar menu, under the **Structure** section, click on **Asset Tree**. The page opens by default in View mode, showing the tree collapsed from the active workspace. The screen has three main areas: a top bar with search and action controls, an optional banner with contextual tips, and the tree itself (which occupies most of the page).



In the top bar, the user finds:

- **Toggle Enable new navigation experience via sidebar:** when enabled at the top of the page, opens a second form of navigation through a persistent sidebar on the left. Detailed in 2.1.3.;
- **Search field:** search by workspace, sub-area, machines. Filters the tree in real time as text is typed;
- **Expand/Collapse button:** toggles between expanding all nodes or collapsing them. Useful for a quick global view or to focus on a section;
- **View/Manage button:** switches between the two page modes. Detailed in 2.1.1 and 2.1.2.;
- **Download icon:** exports the current tree as a CSV file. Detailed in 2.5.2.

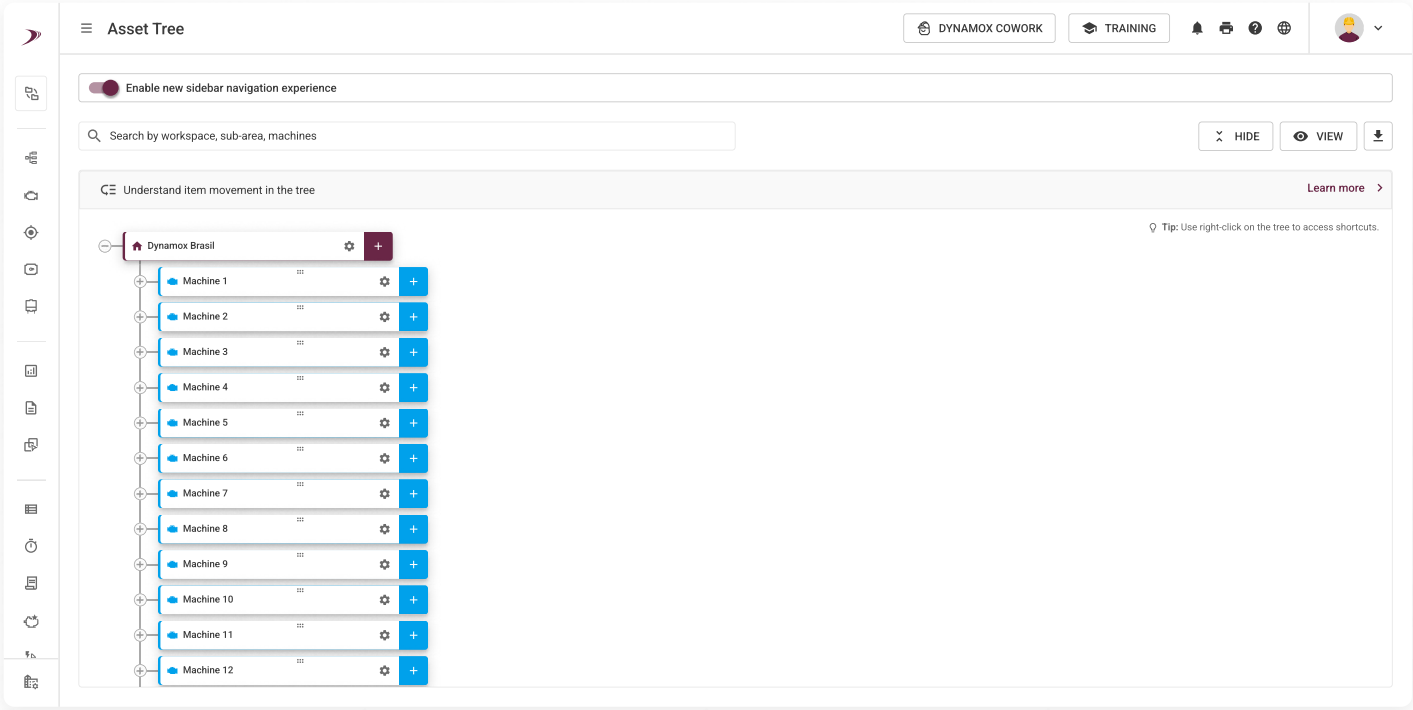
2.1.1 View mode

This is the default mode of the screen. In it, the user browses the structure, expands and collapses nodes, performs searches, and clicks on items to open their detail screens (Machine Central, Folder Central, etc.). View mode is read-only: the user cannot create, edit, or move elements.

Recommended for those who consult the structure on a daily basis (vibration analysts, engineers, technicians) without the risk of accidental changes.

2.1.2 Management mode

By clicking on MANAGE the screen enables the editing controls. Each node in the tree now displays three controls: a drag handle to move, a gear icon to open the details/editing screen, and a button + to add children. The button colors + reflect the type of item that will be created (maroon on the root node, blue on sub-areas and machines, green on subassemblies).

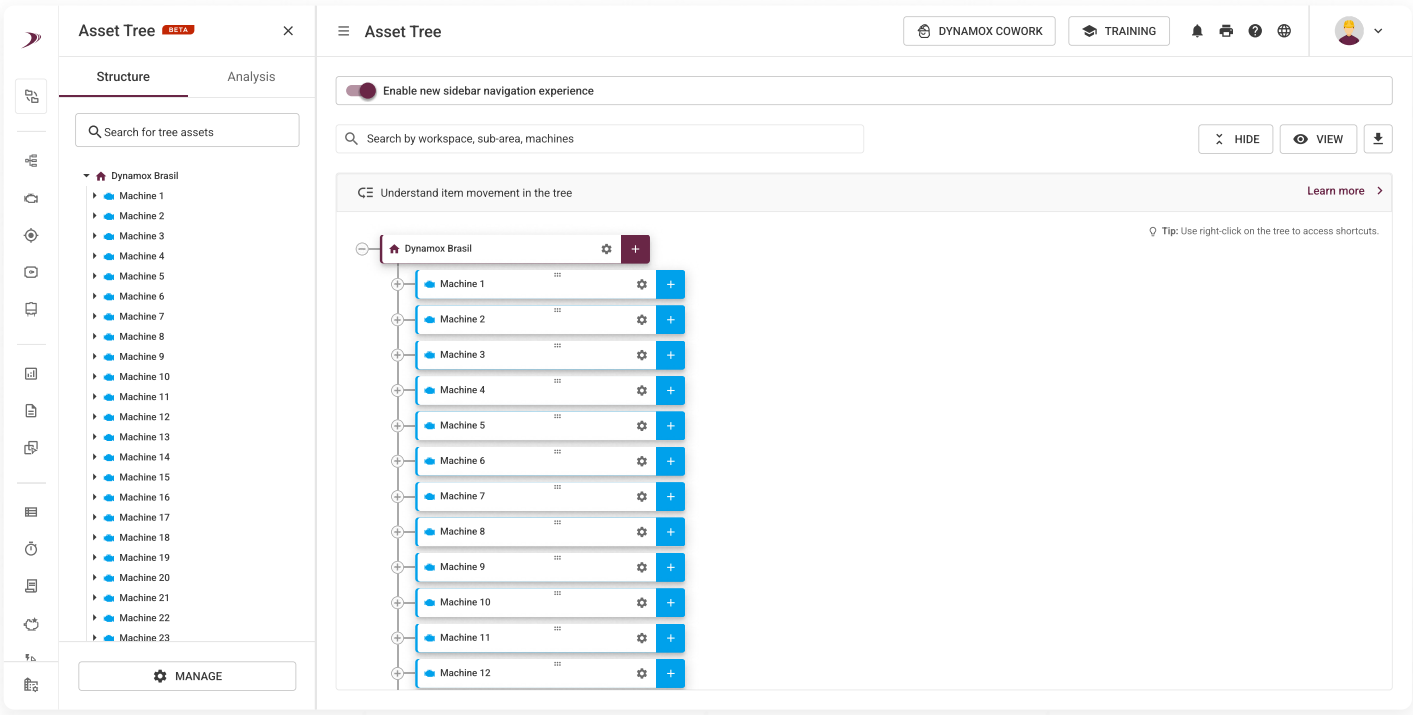


A reminder appears in the upper-right corner of the tree in Management mode: **Use the right-click on the tree to access shortcuts.** Right-clicking any item opens the context menu with the options Edit, Rename, and Delete (detailed in 2.4.1).

Those who use the sidebar navigation (2.1.3) will find the same button BACK in the footer of the sidebar — a shortcut equivalent to the one at the top of the page, useful when the main panel is displaying another screen.

2.1.3 Navigation via sidebar

At the top of the page, a toggle Enable new navigation experience via sidebar enables a second way to access the tree. Once enabled, a persistent sidebar appears to the left of the main content, with the title Asset Tree.



The sidebar has two tabs at the top:

- **Structure:** displays the complete asset tree, now in a clickable list format. Each item in the tree, when clicked, opens its corresponding screen in the main panel (for example, the Machine Central). The tab has its own search field (Search for tree assets) independent from the main panel search;
- **Analysis:** groups quick access to the analysis plans linked to the assets. When the workspace does not have contracted plans, the tab shows the message No plans available with a shortcut to the plan manager.

At the footer of the sidebar, a button appears MANAGE , which opens the Asset Tree page in View mode.

> To turn off the sidebar, simply click the same toggle at the top of the page again. The sidebar can also be temporarily collapsed by clicking the ✕ icon in its upper-right corner, without disabling the new experience.

2.2 Understanding the hierarchy

Each type of item in the tree has clear rules about what can be created within it. These rules ensure that the structure reflects physical reality: a monitoring location only exists within a machine, and a machine only exists within a workspace or a folder.

The table below summarizes the types and their allowed children:

TYPE (color)	PAPER	CHILDREN ALLOWED
Working Area (root)	Company / client	Folders
Folder (blue)	Aggregator	Folders, Machines
Machine (blue)	Monitored asset	Subsets, Spots, Checklists
Subset (green)	Internal division	Components, Spots, Checklists
Component (brown)	Subdivision of the subset	Spots, Checklists
Spot (cyan)	Monitored location	None (leaf node)

> Every machine automatically displays two internal groupers: **Monitoring Points** (which lists the configured Spots) and **Checklists** (which lists the associated checklists). These groupers are not created manually – they appear whenever the machine exists.

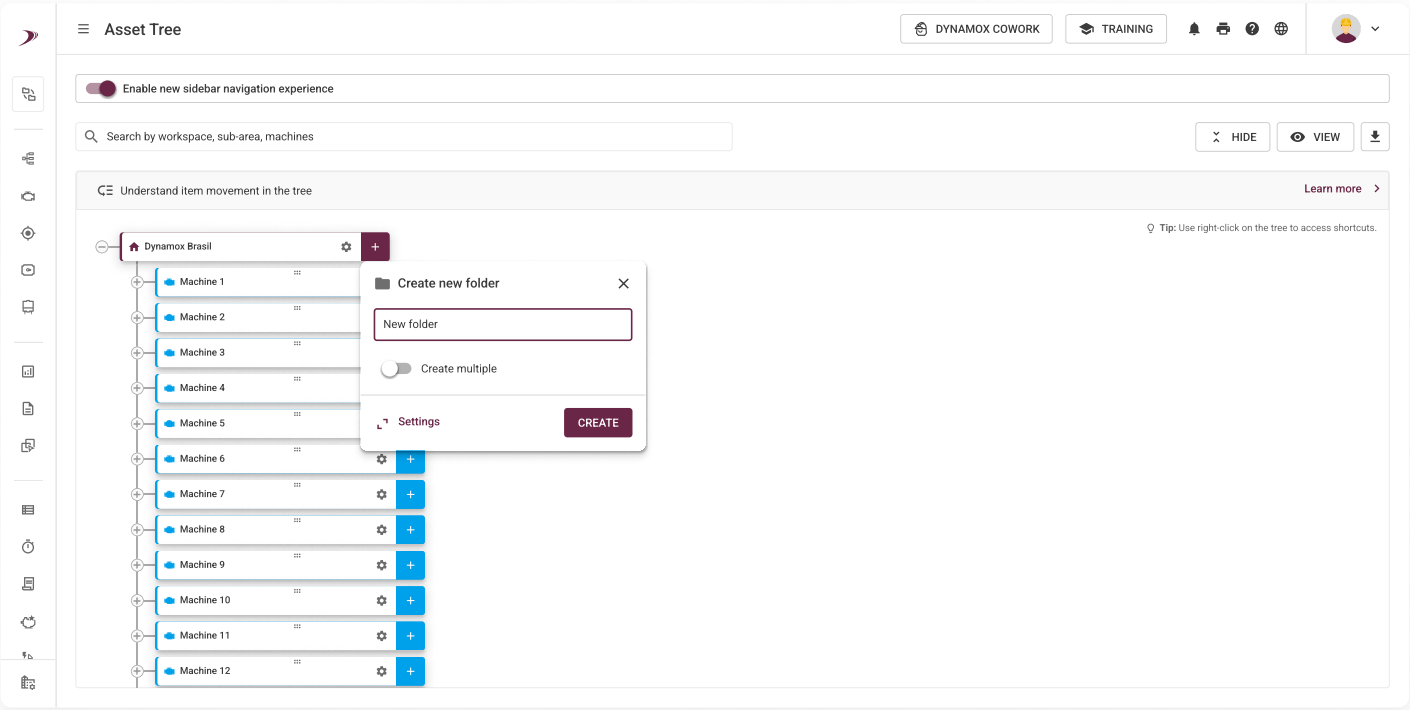
2.3 Creating the structure

Item creation is done exclusively in Management mode. The entry point is always the button + that appears to the right of the parent node's name. The button color indicates the type of item that will be created, and parent nodes with multiple allowed types expand into smaller buttons when clicked.

> The actions described in this chapter (create, edit, move, rename, and delete items) are only available to users with **Administrator** or **Editor** permission at the item's location. Readers and other profiles can view the tree but cannot alter its structure. See the full permissions matrix in 1.2.

2.3.1 Create folder (subarea)

From the root workspace, or from an existing folder, click the button + open the popover **Create new folder**. The user must fill in the Name field and click CREATE . The folder appears in the tree immediately.



The popover offers three features:

- **Name:** required text that identifies the folder in the tree;
- **Create multiple:** toggle that enables creating multiple folders at once (detailed in 2.3.2);
- **Settings:** link at the bottom of the popover that opens the full Folder Central, with additional fields such as Segment, Description, Address, Coordinates, and Contact (detailed in 2.3.3).

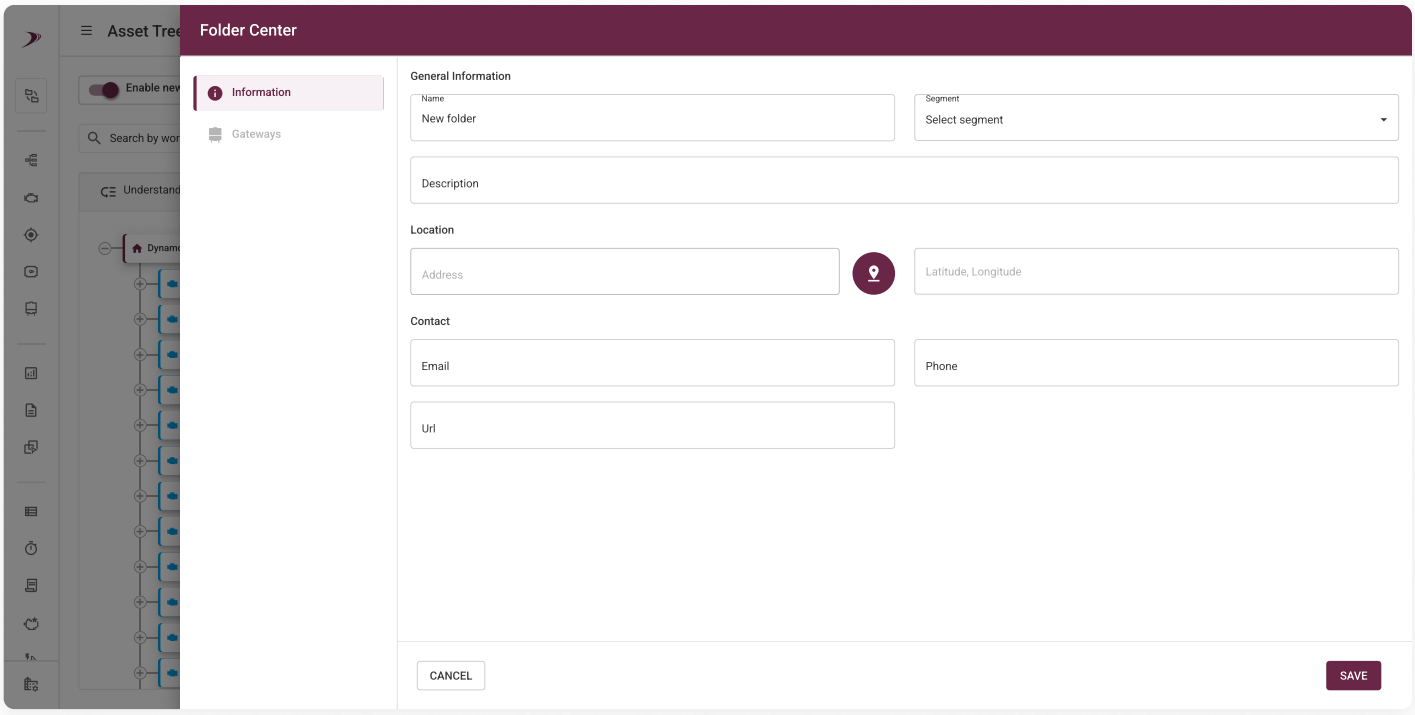
2.3.2 Create multiple items

When the **Create multiple** toggle is enabled in the creation popover, a Quantity field appears next to it. The confirmation button starts showing the total in parentheses, for example, CREATE (5) , making explicit how many items will be generated at once. Each batch-created item receives the same base name typed, with an automatic numeric suffix.

It is useful for quickly populating a repetitive structure (for example, five identical production lines). The Settings link is disabled during multiple creation (advanced fields can only be filled item by item).

2.3.3 Complete settings via hub

By clicking the Settings link in the creation popover, the platform opens a side panel called **Folder Central** (for folders) or **Machine Central** (for machines). This panel exposes all advanced fields for the item, grouped into tabs.



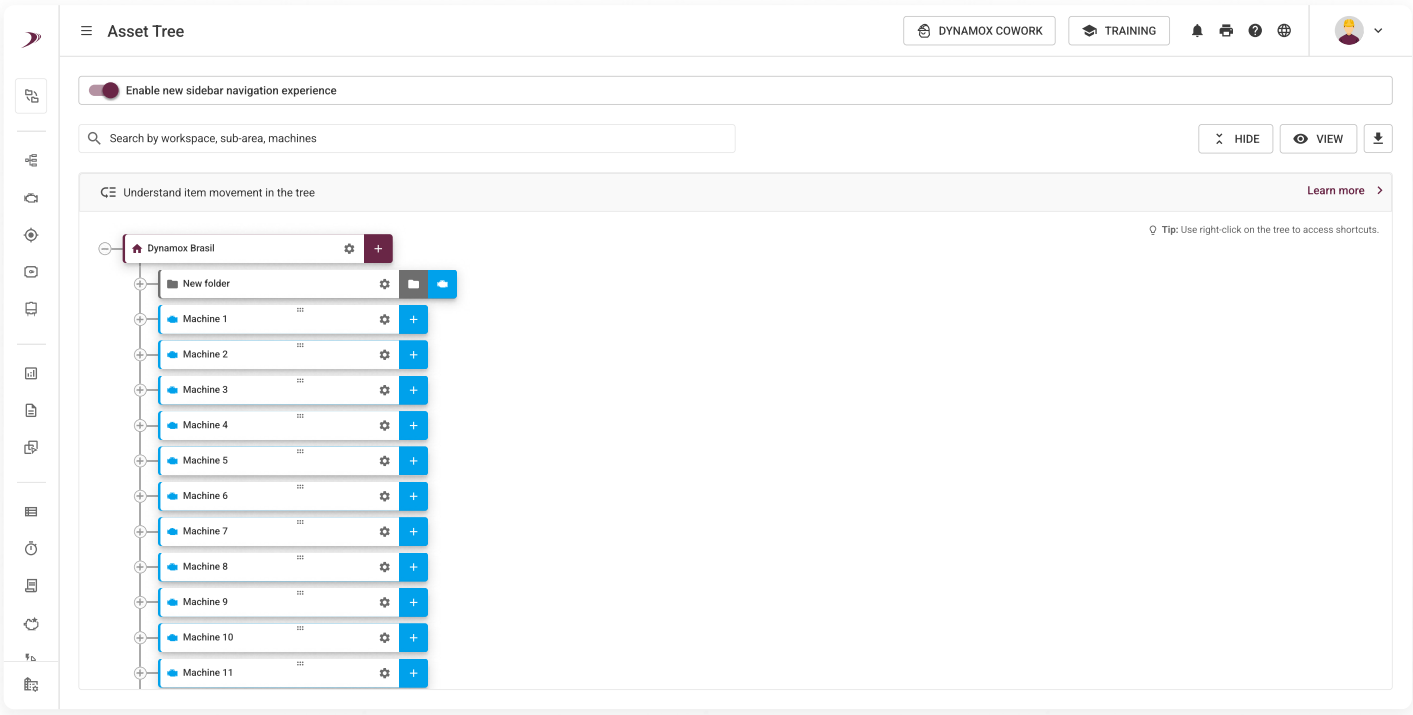
The Folder Central has two tabs:

- **Information:** Name, Segment (pre-defined dropdown), Description, Address with map marker, Latitude/Longitude, Email, Phone, and Contact URL;
- **DynaGateways:** list of DynaGateways linked to the folder, responsible for collecting data from sensors installed in the region.

To finish, the user must click SAVE in the bottom-right corner. CANCEL discards the item without creating it.

2.3.4 Create machine

Machines are created within folders – not directly in the workspace. In **Management** mode, the user must locate the folder where the machine will be allocated and click the blue + button to the right of that folder. Unlike the workspace + , the folder + expands into a sub-menu of colored options – the user must click the blue machine icon.



Next, fill in the form that appears with two fields: **Name**, which will be the asset's display name throughout the Platform; and **Asset type**, where the equipment type can be selected (motor, pump, fan, reducer, etc.) or left blank if the type is not found. If the type you are looking for is not listed, contact Dynamox support to request the addition. To finish, press Enter on the keyboard or click CREATE (5) . The machine appears in the tree immediately.

> To fill in additional technical and management information (characteristics, hour meter, frequencies, users), see the Machine Central in 2.4.2.

2.3.5 Create subset, component, and Spot

The steps to create subsets, components, and Spots are analogous to those for machines; only the parent item and the icon chosen in the + sub-menu change:

- **Subset (green):** is created within a machine. The blue + of the machine expands into three options: Subset (green), Spot (teal), and Associate Checklist (orange).
- **Component (brown):** is created within a subset. The green + of the subset expands into three options: Component (brown), Spot (teal), and Associate Checklist (orange).
- **Spot (cyan):** can be created within machines, subsets, or components. It is a leaf node that does not accept children. It represents the physical location where the Dynamox sensor was installed, and concentrates the data collected by that sensor.

The Associate Checklist option, available on machines, subsets, and components, differs from the others: it does not create a new item; it only links a checklist already registered in the workspace to the asset in question.

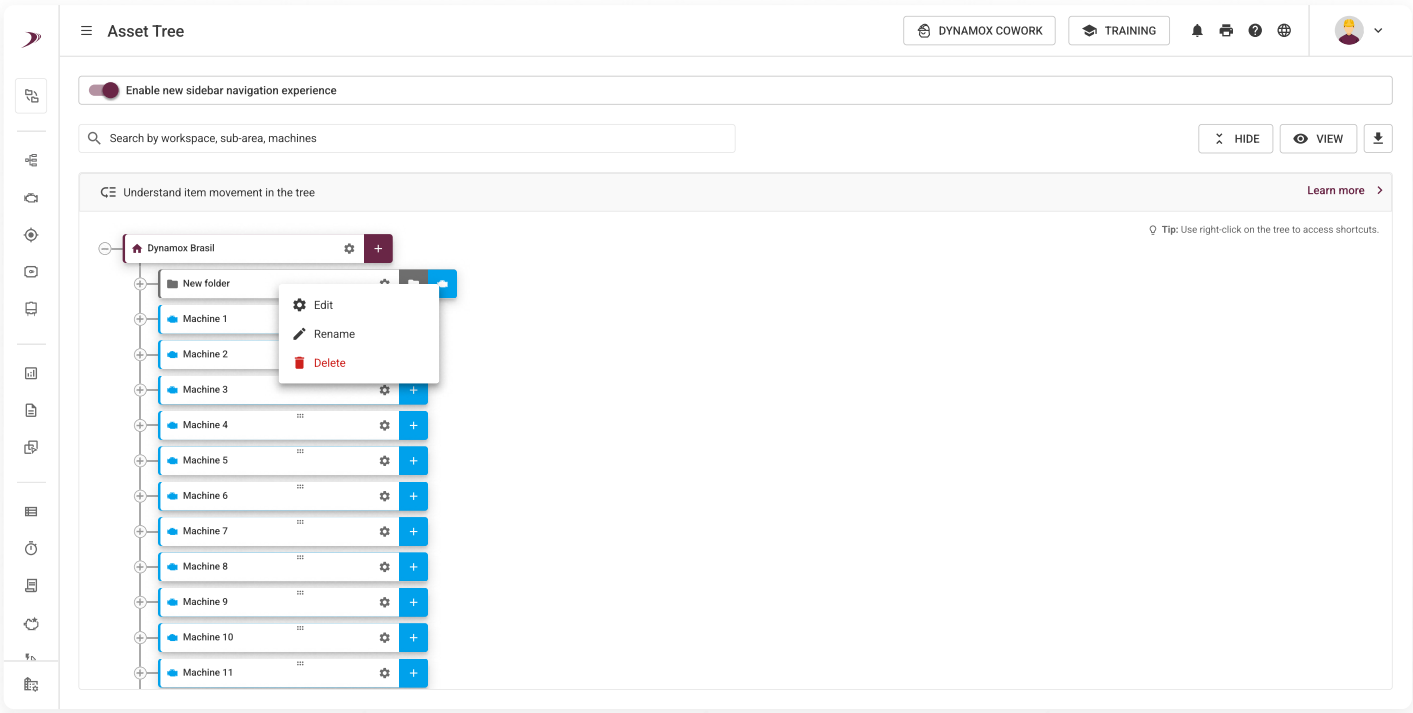
2.4 Manage existing items

In Management mode, existing items can be edited, renamed, moved, or deleted. The actions are distributed across three interface points: the controls to the right of each node, the context menu (right-click), and the drag-and-drop feature itself.

2.4.1 Shortcut menu (right-click)

Right-clicking on any tree node opens a small context menu with the quick actions available for that item type. For folders, subassemblies, machines, and components, the menu offers three options:

- **Edit:** opens the item's Hub (Machine Hub, Folder Hub, etc.), the same screen reached via the icon ⚙ to the right of the node.
- **Rename:** turns the item name into an editable field directly in the tree, without opening a panel. To save, the user presses Enter on the keyboard or clicks anywhere outside the field, and must wait for the operation confirmation before leaving the screen. To cancel the name change, press Esc on the keyboard.
- **Delete:** removes the item and all its children. It is highlighted in red in the menu. Before applying, the platform displays a confirmation screen with the operation impact: the total number of elements that will be deleted and which inspection routes will be affected. The user only loses the data after clicking DELETE the confirmation screen. Deleting a folder erases all the machines, subassemblies, components, and Spots contained within it – the history linked to removed Spots also stops being displayed.



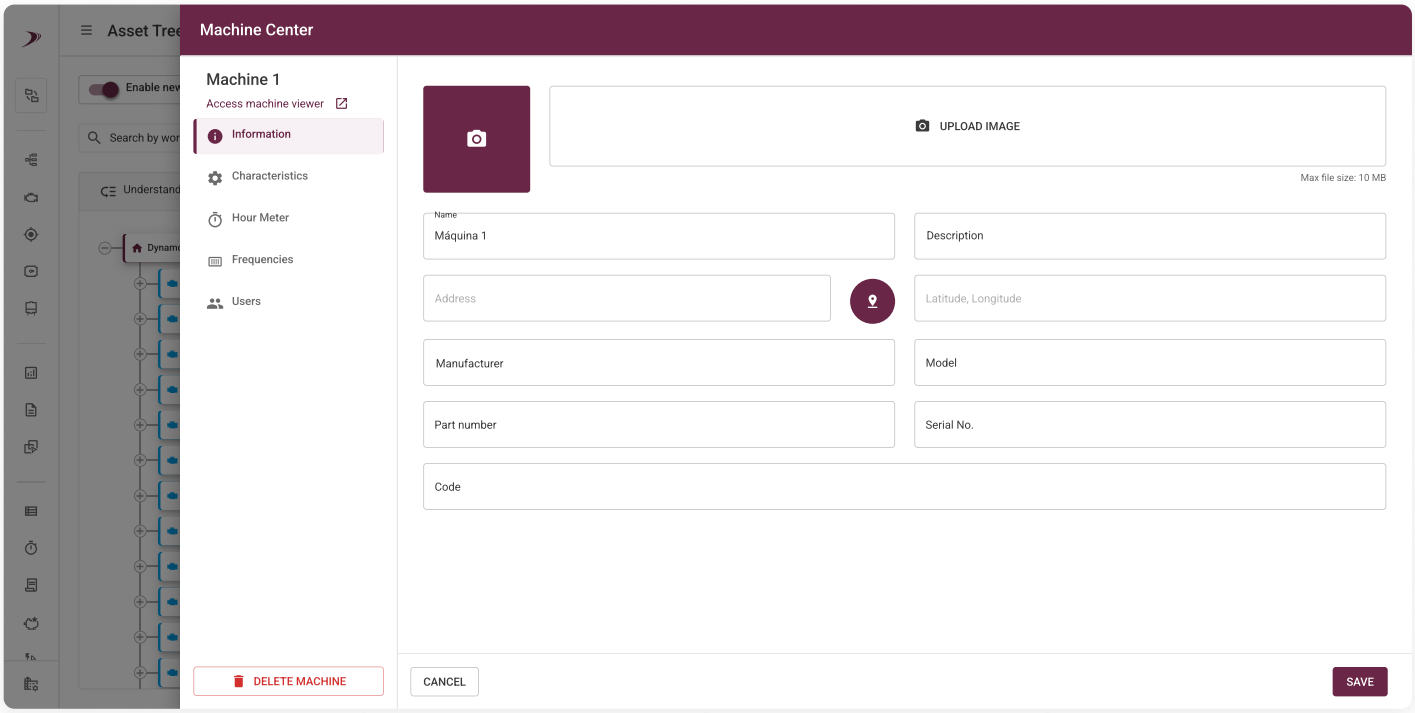
The workspace tree root is the only exception: its context menu offers only Edit and Rename, since the workspace cannot be deleted from the tree (this action, when available, is located on the Administration page).

2.4.2 Machine hub

The gear icon ⚙ to the right of a machine opens the Machine Hub side panel, which consolidates all asset attributes across five tabs:

- **Information:** Name, Description, representative image of the machine, and other descriptive data.
- **Characteristics:** technical specifications (power, rated speed, manufacturer, model, internal tag).
- **Hour Meter:** recorded operating hours – can be linked to a Dynamox Hour Meter sensor or updated manually.
- **Frequencies:** characteristic frequencies used in vibration analysis (rotation, meshing, bearing defects).
- **Users:** list of users who have any permission on the location where the machine is located.

At the bottom of the Hub: DELETE MACHINE on the left, CANCEL and SAVE on the right.



2.4.3 Move items (drag-and-drop)

The ⋮ handle to the right of each node (visible in Management mode) allows you to drag the item to another position in the tree. Vertical movements reorder the item within the same level (same parent). Horizontal movements change the level – dragging to the right enters a new parent; to the left moves up one level. Before dragging, it is important that the destination asset is expanded and loaded in the tree – if the parent is collapsed, the drag-and-drop may not register the destination correctly.

When you drop the item at the new position, the platform displays a floating confirmation message. The user can cancel the action by clicking Cancel in the message (useful when the item was dragged by mistake), or confirm the move in three ways: clicking the ✕ on the message itself, pressing Esc on the keyboard, or simply waiting for the message to expire – in this last case the confirmation is automatic.

The move currently follows two strict rules regarding type and destination:

- Machines can only be moved to Folders. It is not allowed to drop a machine onto another machine, subassembly, or component.
- Spots can be moved to any asset level (machine, subassembly, or component). This allows reorganizing monitoring points as the machine modeling evolves.

2.5 Search and export

2.5.1 Search

The **Search by workspace, subarea, machines** field at the top of the page filters the tree in real time. When typing, only the nodes whose name contains the term (or whose ancestors contain it) remain visible. Clearing the field restores the complete tree.

The search is useful for locating a specific machine in large trees. Typing part of the name or the machine's tag returns the path to it, with parent nodes expanded automatically.

2.5.2 Export CSV

The download icon in the upper-right corner exports the current tree as a CSV file.
The file includes one row per item, with columns for type, name, identifier, and hierarchical path. It is useful for inventories, migrations, and offline audits.

> If a search filter is active at the time of download, the exported CSV contains only the visible items. To export the entire tree, clear the search first.

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