User Guide for Work Instructions

Connected Worker Solutions



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Title and Copyright

Copyright and Terms of Use page for Work Instructions Authoring Application.

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Preface

Understand audience, know related documents and products and conventions followed in this document.

Intended Audience

This user guide is for plant maintenance field service technicians in your organization. The user guide familiarizes technicians with features and functionality of the Connected Back Office solution.

Document Conventions

Convention	Meaning
boldface	Indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Indicates book titles, emphasis, or place- holder variables for which you supply values.
monospace	Indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter

Table 0-1 Conventions followed in the document

Related Products & Solutions

- Work Order Management
- Inventory and Warehouse Management
- Analytics and Dashboards

Contact Innovapptive

For information on Innovapptive products, visit the Innovapptive's Support Portal at http:// helpdesk.innovapptive.com. The updates to this document are published on this support portal. Check this website periodically for updated documentation. For additional information about this document, send an email to documentation@innovapptive.com.

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1. Overview of Work Instructions Authoring Module

The Work Instructions Authoring module provides a platform to author step-by-step digital work instructions for technicians along with prerequisites, tips, hints, and pictures.

Technicians can go through the step-by-step instructions, execute tasks of work order, and finish the job quickly and efficiently.

This avoids loss of procedural knowledge and ensures safe and efficient job completion, decreases downtime, increases productivity.

1.1. New Features and Enhancements

The following are the new features and enhancements for Work Instructions module.

Check the releases below for the information:

• New Features and Enhancements in Release 2208 (on page 6)

New Features and Enhancements in Release 2208

Table 1-1 New Features and Enhancements in Release 2208

Communicate and Collaborate with Coworkers

- Integrate with Slack or MS Teams.
- Communicate and collaborate with other users.
- Share and gather information to execute the work efficiently

For information, How to connect to Slack (on page 12).

Author Work Instructions for Work Orders

Table 1-1 New Features and Enhancements in Release 2208 (continued)

- Author step-by-step digital work instructions for technicians along with prerequisites, tips, hints, and pictures.
- Technicians can go through the step-by-step instructions, execute tasks of work order, and finish the job quickly and efficiently.
- Import audio files and create work instructions using them.
- Avoid loss of procedural knowledge and ensure safe and efficient job completion, decrease downtime, increase productivity.

For information, Get started with of Authoring Work Instructions (on page 18).

1.2. Compatible Devices and Applications

To run the CBO application, you need the following compatible devices and applications.

System	Minimum Requirement
Software	SAP Cloud Connector latest version
	SAP NetWeaver Gateway 7.4 and above Reverse proxy (SAP Web Dispatcher, Nginx)
Compatible Security Authenti- cation Mechanism	SAML and OAuth 2.0 for SSO
Compatible OS Platform and Version(s)	64-bit Windows and Macintosh
Compatible Form Factors	Desktop & Laptop
Compatible Devices	NA
Compatible Browsers	Chrome (Best view), Firefox, and Intent Explorer (IE) Edge
Device Storage and Memory Re- quirements	Windows
	8GB RAM & 64-bit operating system, x64-based proces- sor is preferred
	Macintosh

Table 1-2 System Requirements for CBO

System	Minimum Requirement
	8GB RAM & 64-bit operating system

Table 1-2 System Requirements for CBO (continued)

2. How to log into Web Application

Open the application using the URL and login with your User ID and Password.

To log into the Web Application:

- 1. Open the application using the URL provided to you. Contact your Innovapptive representative for the URL.
- 2. Enter your User ID (Email, Phone, or Skype).



Let's get empowered		
	Sign in	
	Email, phone, or Skype	
	Can't access your account?	
0	Back Next	
▝▖▖▖▖▖	🔍 Sign-in options	

- 3. Click Next.
- 4. Enter your **Password**.
- 5. Click Sign in.

A screen with the Hamburger menu on the top left is displayed.

6. Click the Hamburger — menu on the top left to see the module.

3. Application Functionalities

This chapter familiarizes you with Work Instructions module features.

In this chapter, you learn:

- How to access the Work Instructions Module? (on page 10)
- How to update your Profile (on page 10)
- How to connect to Slack (on page 12)
- How to connect to MS Teams (on page 15)
- How to search for Work Instructions (on page 17)

3.1. How to access the Work Instructions Module?

Access the module by clicking the Hamburger \equiv menu on the top left of the screen.

When you click the menu, the left-side pane expands. Click the Expand ricon to see the sub-modules associated with the modules. Use the scroll bar to see the hidden menu items.

Click again the Hamburger \equiv menu or outside the pane to collapse the left-side pane.

≡	Dashboard	Suntha Veeramachaneni Super Admin
	Dashboard Reports	f v New Dashboard Default ··· Widgets 3 Create Widget
	Tenant Management	ief ••• Time Utilization Brief Copy(1) •••
20	User Management 🕨	Left Supervisor Advisor Leave
×	Maintenance Control Center	b Ste
A la	Spare Parts Control Center	5 100 150 200 0 50 100 150 200 FRecord Count Record Count
	Work Instructions Authoring	
	Favorites	ief Conv(2) ····
	Drafts	
	Published	Advisor technician tec
	Powered by	ob Site 2 0 165
\otimes	INNOVAPPTIVE	ctions 4 153/166



3.2. How to update your Profile

You can update your profile by adding or removing your profile photo and adding / updating your contact number.

To access and update your profile:

1. Click the Profile Picture on the top right and select **Profile**.

Da	Dashboard New Dashboard (def V New Dashboard (Default) ***	Sunitha Veeramachaneni Super Admin Widgets 3 sign Out
2	Time Utilization Brief	 Time Utilization Brief Copy(1)
:	Authorized Breaks	Trachinician Left Supervisor Advisor Leave
	0 50 100 150 200 Record Count	6 recently insulucions 0 50 100 150 200 Record Count
	Time Utilization Brief Copy(2)	
	Technician Left Advisor Supervisor 42 Authorized Breaks 462 46 <td></td>	

2. Click the **Edit** button.



≡ Y	our Settings				Super Admin
^	Profile	Profile			Edit
•.					
*					
6 la			First Name Sunitha	Last Name veeramachaneni	
1			Title Super Admin Email		
			sunitha.veeramachaneni(@innovapptive.com	
			Roles Super Admin		
			Contact		
\otimes					

Figure 3-2 Open User Profile

- 3. Update the profile such as remove or change photo and add contact details.
- 4. Click the **Save** button.

Figure 3-4 Save User Profile

≡ Y	our Settings				Derived Super Admin
•	Profile	Profile			Edit
20					
Ж					
Fe la			First Name Sunitha	Last Name veeramachaneni	
1			Title Super Admin		
			_{Email} sunitha.veeramachaneni@)innovapptive.com	
			Roles Super Admin		
			Contact		
8					

Profile updated successfully.

3.3. How to connect to Slack

Connect to the Slack application from the CBO application. Once connected, you can receive, view, and reply to the messages received on Slack directly from the CBO application.

To connect to Slack:

1. Click the **Connect to Slack** button on the top right.



Figure 3-5 Connect to Slack

2. Click the **Allow** button to approve the connection.

Figure 3-6 Approve Slack Connection

This a	pp was created by a member of your workspace, Innovapp	tive Inc
Ē	Content and info about channels & conversations	•
	Content and info about your workspace	•
Wh	at will CWP-Slack-Dev be able to do?	
2	Perform actions as you	•
Ē	Perform actions in channels & conversations	•
	Perform actions in your workspace	•

A message \vdash icon appears on the top right. You can see the notifications on top of the icon whenever you receive a message.

- 3. Click the message 🟳 icon.
- 4. In the Slack Chat window,

a. Click the **Chats** tab to send a message and to see the recent chats and sent messages.

You can also add attachments by clicking the Attachment icon in the message box.

Dashboard Dashboard	1 (default) - Dashboard 1 (Default)	Chats Calls People		<> × 4 Crea
Time I Inilia	atian Descert	Search Users	Navaneetha Kondra Super Admin	€
Time ouiz		Sunitha Veeramacha	0	
	11.12%			
	11.12%	Navaneetha Kondra		
	11.12%		8	230 14 22
				ROTH RUTS
	11.12%			
Transactio	ns - Actions and Work Centers Report		0	
ONE				

Figure 3-7 Slack Chat Window

b. Click the **People** tab to see the available users and select the person to chat with.

Figure 3-8 Search People



You can expand the window using Expand 🕨 icon and move the window around.

3.4. How to connect to MS Teams

Connect to the MS Teams application directly from the CBO application by logging in with Microsoft credentials. Once connected, you can receive, view, and reply to the messages received in Teams directly from the CBO application.



To connect with MS Teams, you should select the **Collaboration Type** as **MS Teams**. For more information, see How to create Tenant/Super Admin role (*on page*).

To connect to MS Teams:

- 1. Login to the application using Microsoft credentials (for example, abc@ym27j.onmicrosoft.com).
- 2. Click the message \vdash icon on the top right corner.
- 3. In the MS Teams Chat window,
 - a. Click the **Chats** tab to send a message and to see the recent chats and sent messages.

You can also add attachments by clicking the Attachment icon in the message box.

Figure 3-9 MS Teams Chat Window

=	Roles & Permissions				LOGO COMES HERE
0			Inno Chat	↔ x	
	Q Search		Chats Calls People QA Search Users	₹. ■	Copy Save
20	Super Admin 📀	41 of 41	Group name	4 days ago	
×	Manager	41 of 41	A PA		
			<pre>QA <systemeventmessage></systemeventmessage></pre>		
			QA <systemeventmessage></systemeventmessage>		
			Navaneetha Kondra -Thanks for using the Ø Enter Message.	> 🕴	
\otimes					

b. Click the **People** tab to see the available users and select the person to chat.

Figure 3-10 Search People

Roles & Permissions User Management > Roles & Permiss	2015	
	Inno Chat	• x
	Chats Calls People	Z Roles Add R
Search	Search Users	: Copy Si
Super Admin 📀	41 of 41 Navaneetha Kondra Manager	
Manager	41 of 41	
<u>Blo</u>	Manager	
I	Rahul Gopikuttan Manager	
	Abhijit Maharana Manager	
	Sundeep Ankisetty Connected Office Worker Platform User	
	Snehil Maliwal Manager	
2		

You can expand the window using Expand 🕨 icon and move the window around.

3.5. How to search for Work Instructions

Search work instructions using the search bar in the module screens.

• Enter the work instruction title in the Search field of the **Work Instructions Authoring** screen.

4. Get started with of Authoring Work Instructions

Use the **Work Instructions Authoring** module to create digital work instructions for technicians to work on a work order.

This module enables you to create step-by-step instructions and itemized guides for distinct processes by adding tips, hints, and pictures in each step while creating a work instruction.

Once the work order is created, the digital work instructions are created directly to work order using this module. As a technician, you can go through the step-by-step instructions and work on the assigned work order to finish the job quickly and flawless.

This feature helps you to avoid loss of procedural knowledge and ensure safe and efficient job completion, decrease downtime, increase productivity, and work safely.





In this module, you can perform following actions:

- Search work instructions with title or author.
- Filter work instructions just by authors.
- Save work instructions as drafts and work on them later.
- Add work instructions to favorites.
- Create a new category, edit, and delete existing categories.

- Import the excel file and audio file and convert it to work instructions.
- Copy existing work instructions to create a new one.
- Download the work instruction templates.
- Add tips, hints, and pictures to the work instructions.

4.1. How to create Work Instructions

Create step-by-step work instructions for technicians with details like prerequisites, images, warnings, hints, plans, and so on. The technician can go through the instructions and execute tasks to complete the work order.

To create work instructions:

1. Click the Work Instructions Authoring module on the left side pane.

In this screen, you can,

- Search the work instructions using the **Search** bar.
- Download the templates using the **Download Template** option, fill in the details, and export the excel file using the **Import File** option.
- Copy work instruction from the existing one using Copy Existing option to create a new work instruction.
- Access the drafted work instructions in the **Drafts** section to work on.
- Access the favorite work instructions in the **Favorites** section.
- Create a category using the Add Category button to categorize the work instructions.

2. In the Work Instructions Authoring screen, click the Create Work Instruction button.

Figure 4-2 Add Header Details



| 4 - Get started with of Authoring Work Instructions

In this screen, you can do the following:

- Mark a work instruction as your favorite using the Favorite 🛱 icon to identify and access the work instruction easily.
- Copy the existing work instruction using the More *** icon > select Copy Work Instruction.
- Delete the work instruction using the More *** icon > select Delete Work Instruction.
- Select the preview option iPad or iPhone in the Preview on the drop down to display the instructions in the required preview. It helps you to decide the format (iPad or iPhone) before finalizing the work instructions.
- Click the Hide Preview icon to hide the preview.

Figure 4-3 iPad Preview

	HIDE PREVIEW	Preview on	•
9:41 M	n Jun 3		ıl ≎100% ➡
×	Work Instructions 3 Steps		Q
На	zardous Energy Source Lockout		► Start
1	STEP1		>
2	STEP2		>
3	STEP3		>



Figure 4-4 iPhone Preview

3. Enter the title of the work order.

Note:

When you enter the title, the work instruction is saved automatically.

- 4. In the **Header** tab, add the following header data,
 - a. In the **Assignments** section, select **Categories** and **Assigned Objects** from the drop downs.



- b. Click Cover Image to add a cover image.
- c. In the **Prerequisites** section, add **Tools**, **Safety & PPEs**, and **Spare Parts** to carry to perform a specific task/job.
- 5. Click Step 1 at the bottom to define the steps in detail.

Figure 4-5 Add Steps

Work Instructions Authoring > Sample WI				Maintenance Manager
Sample WI			🟠 🚥 All Changes Save	ed 🔽 🛉 PUBLIS
K K HEADER 1. PARK FORKLIFT > >				+ ADD ST
Park Forklift	D	×		Preview on
Attachments			HIDE PREVIEW	iPad
TUPLOAD or drop attachments here			Work Instructions 1 of 1 Steps	.d ≑ 100
= Inventory.jpg	-	×	Dack Easklift	
			1. Instruction one	
Instructions			2. Instruction two	
Instructions Instruction one			Wear gloves	
2. Instruction two		C		
• • •			Hint	
A warnings			Reaction Plan	

In this tab, you can,

- $_{\circ}$ Clone or copy the step using the Clone Step \square icon.
- $_{\circ}$ Delete the step using the Delete Step 📕 icon.
- 6. In the Step tab, add the following details:
 - a. In the **Attachments** section, click the **Upload** button to add images.
 - You can drag and drop the images.
 - b. In the **Instructions** section, add **Instructions**, **Warnings**, **Hints**, and **Reaction Plan** details.
- 7. Add Step 2, Step 3, and so on as required.

You can also click the Add Step button to add steps.

Click the **Publish** button to publish the work instruction.
 You can access the published files from the Published sub module. For more information, see How to access Published Work Instructions (on page 26).

4.2. How to create Work Instructions from Audio Files

Import audio files and create work instructions quickly. You can use this feature to dictate / record instructions and import those audio files to create author Work Instructions instantly.

To create work instructions using audio files:

- 1. Click the Work Instructions Authoring module.
- 2. Click the **button next to the Create Work Instruction** button and select the **Import File** option to select the audio file.

Imported audio files are displayed in the Files screen.

3. Click Files on the left side module.

Figure 4-6 Create Work Instructions from Audio Files

	Files			Sunitha Veeramachaneni Maintenance Manager
n Dashboard	Q Search by title or author			
🔀 Maintenance Control Center				
🔊 Spare Parts Control Center	File Name	Date and Time 🛧		
i ■ Work Instructions Authoring	Gas+Forklift+Inspection	11 Feb 2022 13:08:03	•	Create Work Instruction
Favorites	Gas+Forklift+Inspection	11 Feb 2022 13:07:17	•	Create Work Instruction
Drafts				
Published	Gas Forklift Inspection	03 Feb 2022 18:07:14	• 🖍	Create Work Instruction
Recents			• •	-
Files	Gas Forklift Inspection	03 Feb 2022 18:00:55	• •	Create Work Instruction
	Gas Forklift Inspection	03 Feb 2022 17:58:34	• 🖍	Create Work Instruction
	Gas Forklift Inspection	03 Feb 2022 17:48:52	•	Create Work Instruction
		IK K 🚺 2	345>	>

4. Click the Create Work Instruction button near the audio file.

A window appears saying building your work instructions.

5. Click **Okay** to make any changes to the work instruction.

Application is navigated to the work instruction creation screen where you can modify or add additional details. For more information, see How to create Work Instructions (on page 19).

or

6. Click **Publish Now** to directly publish the work order.

In this screen, you also can,

- Search the files using the **Search** bar.
- $_{\circ}$ Sort the work instructions using the Sort 11 icon next to the columns.
- $_{\circ}$ Play the audio file using the Play igvee icon.
- Edit the audio file name using the Edit
 icon.
- $_{\circ}$ Delete the audio file using the Delete 📕 icon.

4.3. How to access Work Instructions that are marked favorite

Mark work instructions that you access often as favorites and access them quickly from the Favorites screen.

To access the work instructions that are marked favorite:

Click **Favorites** on the left side pane.



Figure 4-7 Access Favorite Work Instructions

	Favorites Work Instructions Authoring > Favorites			Sunitha V Mair	eeramachaneni Itenance Manager
n Dashboard	Q Search by title or author	Authors	•		
Maintenance Control Center Spare Parts Control Center	Title 🛧	Category	Last Edited	Author	
Work Instructions Authoring	Hazardous Energy Source Lockout	Job Instructions ,Lockout Procedures,Equipment Testing	Edited 5 days ago by Dev undefined	Oev undefined	*
Drafts Published	Generator - Dead Battery Repair	Generator Repair	Edited 5 days ago by Dev undefined	Dev undefined	*
Recents		1< <	1 > >1		
Files					

In this screen, you can,

- Search work instructions with title or author.
- Filter work instructions with the author using the **Authors** drop down next to the Search bar.
- Sort the work instructions using the Sort ¹¹ icon next the columns.
- Mark a work instruction unfavorite using the Unfavorite 🔀 icon.
- Edit the work instruction using the More *** icon > select Edit Work Instruction.
- Copy the existing work instruction using the More *** icon > select **Copy Work Instruction**.
- Delete the work instruction using the More *** icon > select **Delete Work Instruction**.

4.4. How to access Work Instructions in Draft mode

When you save work instructions, they remain in draft mode. This feature helps you work on work instructions over a period of time. Access the saved or the work instruction that is in the draft mode from the Drafts screen and continue authroring work instructions.

To access the drafted work instructions:

Click **Drafts** on the left side pane.

Fig	ure 4-8 Acce	ess Drafted Work Inst	ructions			
	INNOVAPPTIVE	Drafts Work Instructions Authoring > Drafts			Sunitha Veerar Maintenar	nachaneni Ice Manager
x x	Dashboard Maintenance Control Center	${\bf Q}$ Search by title or author	Authors	5 💌		
D la	Spare Parts Control Center	Title	Category	Last Edited 🛧	Author	
1 3 5	Work Instructions Authoring	Pump - Cavitation	Unassigned	Edited 36 minutes ago by sunitha veeramachaneni	Oev undefined	☆ …
	Drafts	gas forklift inspection	Unassigned	Edited Today by sunitha veeramachaneni	Sunitha veeramachaneni	☆ …
	Recents	E Automation work instruction nine	Safety Measures	Edited Today by sunitha veeramachaneni	Sunitha veeramachaneni	☆
	Files	TestOne	Unassigned	Edited Today by sunitha veeramachaneni	Sunitha veeramachaneni	☆
		Test	Job Instructions	Edited Yesterday by sunitha veeramachaneni	Sunitha veeramachaneni	☆
		ATS Generator Set up	Generator Maintenance	Edited 5 days ago by Dev undefined	Oev undefined	☆
			16.6	1 2 2 21		

In this screen, you can,

- Search work instructions with title or author.
- Filter work instructions with the author using **Authors** drop down next to the Search bar.
- Sort the work instructions using the Sort ¹¹ icon next the columns.
- Mark a work instruction as your favorite using the Favorite 🛱 icon to identify and access the work instruction easily.
- Edit the work instruction using the More *** icon > select Edit Work Instruction.
- Copy the existing work instruction using More *** icon > select Copy Work Instruction.
- Delete the work instruction using the More *** icon > select Delete Work Instruction.

4.5. How to access Published Work Instructions

You can access the work instructions that are published from the Published screen.

To access work instructions that are published:

Click **Published** on the left side pane.

Figure 4-9 Access Published Work Instructions

\otimes	INNOVAPPTIVE	Published Work Instructions Authoring > Published			Sunitha Veeran Maintenan	ce Manager
л Х	Dashboard Maintenance Control Center	Q Search by title or author	Authors	•		
₽J¤	Spare Parts Control Center	Title	Category	Last Edited 🛧	Author	
	Work Instructions Authoring	Automation work instruction Add Category and	Safety Measures	Edited 2 days ago by sunitha veeramachaneni	sunitha veeramachaneni	☆ …
	Drafts	Published WorkInstruction Delete With Steps	Unassigned	Edited 2 days ago by sunitha veeramachaneni	sunitha veeramachaneni	☆ …
	Recents	Published WorkInstruction With Steps	Unassigned	Edited 2 days ago by sunitha veeramachaneni	sunitha veeramachaneni	☆
	Files	Hazardous Energy Source Lockout	Job Instructions ,Lockout Procedures,Equipment Testing	Edited 5 days ago by Dev undefined	Oev undefined	*
		Generator - Dead Battery Repair	Generator Repair	Edited 5 days ago by Dev undefined	B Dev undefined	*
		Work Instruction	Unassigned	Edited 5 days ago by Dev undefined	B Dev undefined	☆ …
			i< < 1 > >i			

In this screen, you can,

- Search work instructions with title or author.
- Filter work instructions with the author using **Authors** drop down next to the Search bar.
- Sort the work instructions using the Sort ¹¹ icon next the columns.
- Mark a work instruction as your favorite using the Favorite 🛱 icon to identify and access the work instruction easily.
- Mark a work instruction unfavorite using the Unfavorite 🗡 icon.
- Edit the work instruction using the More *** icon > select Edit Work Instruction.
- Copy the existing work instruction using the More •••• icon > select **Copy Work Instruction**.
- Delete the work instruction using the More *** icon > select **Delete Work Instruction**.

4.6. How to access Recent Work Instructions

Access the work instructions that you recently worked on in the Recents screen.

To access recent work instructions:

Click **Recents** on the left side pane.

	Recents Work Instructions Authoring > Recents			Sunitha V Mai	Veeramachaneni ntenance Manager
Dashboard					
Maintenance Control Center	Search by title or author	Authors	Ť		
Spare Parts Control Center	Title	Category	Last Edited \uparrow	Author	
Work Instructions Authoring	Effluent Cleanup and AnalysisCopy(1)	Unassigned	Edited 9 minutes ago by	kiran palani	\$ ²
Favorites	Draft	ondooigned	kiran palani	0	A
Drafts		I< <	1 > >		
Published			_		
Recents					
Files					

Figure 4-10 Access Recent Work Instructions

In this screen, you can,

- Search work instructions with title or author.
- Filter work instructions with the author using the **Authors** drop down next to the Search bar.
- Sort the work instructions using the Sort ¹¹ icon next the columns.
- Mark a work instruction as your favorite using the Favorite 🔀 icon to identify and access the work instruction easily.
- Mark a work instruction unfavorite using the Unfavorite 🏋 icon.
- Edit the work instruction using the More *** icon > select **Edit Work Instruction**.
- Copy the existing work instruction using the More *** icon > select **Copy Work Instruction**.
- Delete the work instruction using the More *** icon > select **Delete Work Instruction**.