

User Guide for Work Instructions

Connected Worker Solutions



Title and Copyright

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

User Guide for **Work Instructions Authoring** application, a *Connected Office Worker Solution*.

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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

Table 0-1 Conventions followed in the document

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

Related Products & Solutions

- [Work Order Management](#)
- [Inventory and Warehouse Management](#)
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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

<p>Communicate and Collaborate with Coworkers</p> <ul style="list-style-type: none">• Integrate with Slack or MS Teams.• Communicate and collaborate with other users.• Share and gather information to execute the work efficiently <p>For information, How to connect to Slack (on page 12).</p>
<p>Author Work Instructions for Work Orders</p>

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.

Table 1-2 System Requirements for CBO

System	Minimum Requirement
Software	SAP Cloud Connector latest version SAP NetWeaver Gateway 7.4 and above Reverse proxy (SAP Web Dispatcher, Nginx)
Compatible Security Authentication 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 Internet Explorer (IE) Edge
Device Storage and Memory Requirements	<p>Windows</p> <p>8GB RAM & 64-bit operating system, x64-based processor is preferred</p> <p>Macintosh</p>

Table 1-2 System Requirements for CBO (continued)

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

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:

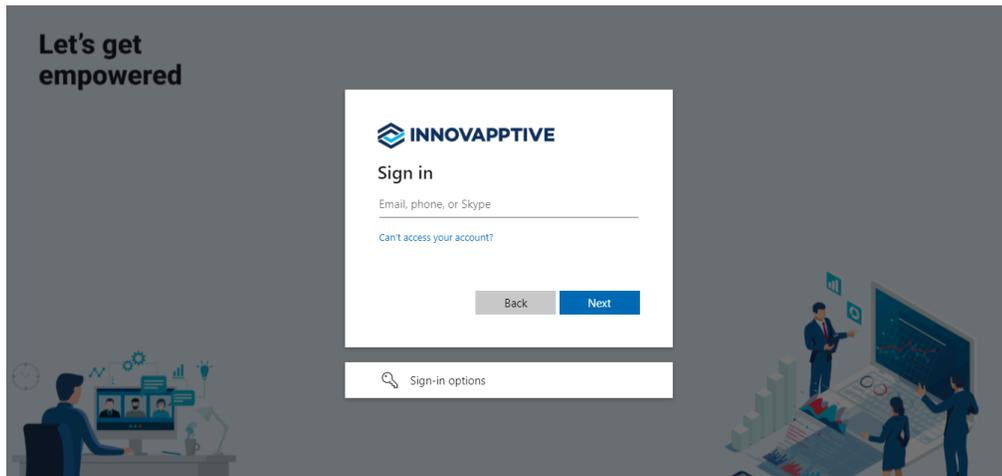
1. Open the application using the URL provided to you. Contact your Innovapptive representative for the URL.
2. Enter your **User ID** (Email, Phone, or Skype).



Note:

The Email ID should be registered with the **Tenant IDP**.

Figure 2-1 Sign in Screen



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 \(on page 17\)](#)

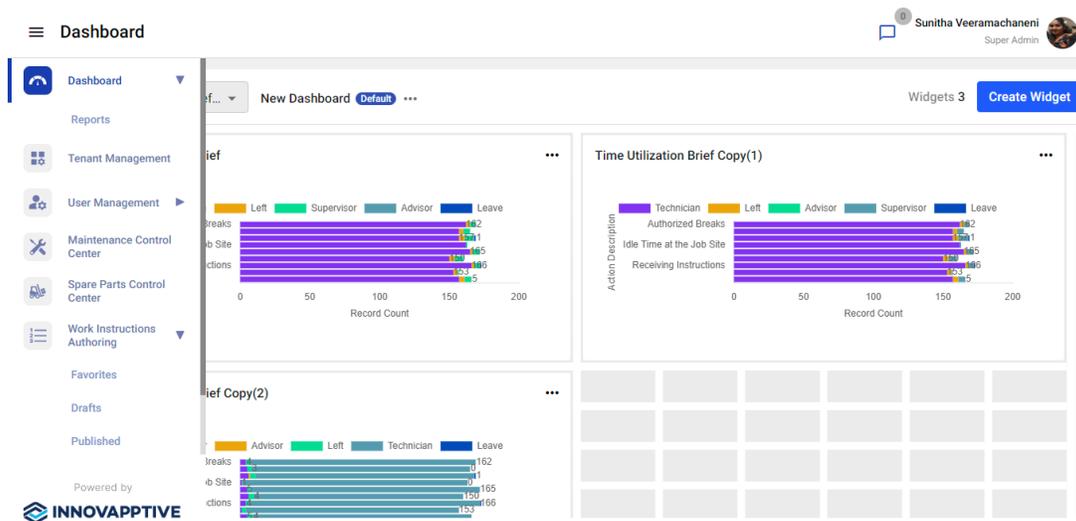
3.1. How to access the Work Instructions Module?

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

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

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

Figure 3-1 Access Module



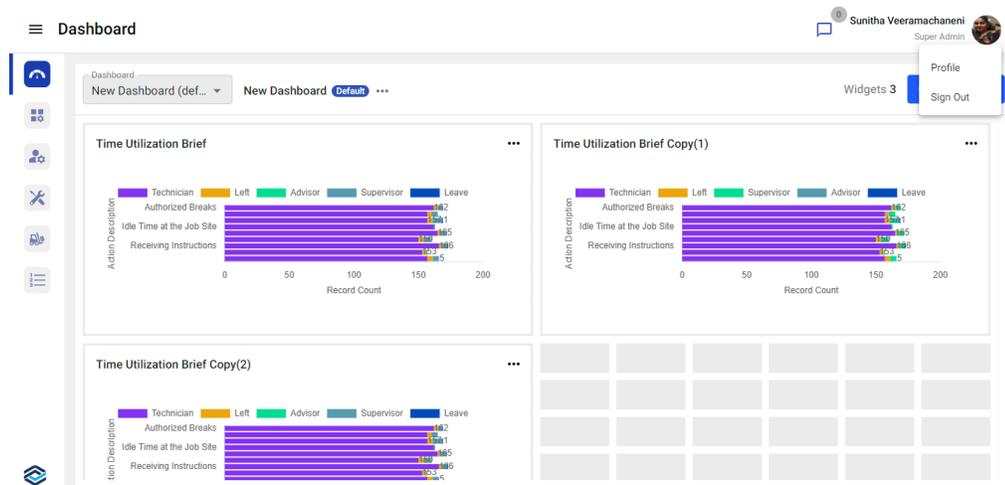
3.2. How to update your Profile

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

To access and update your profile:

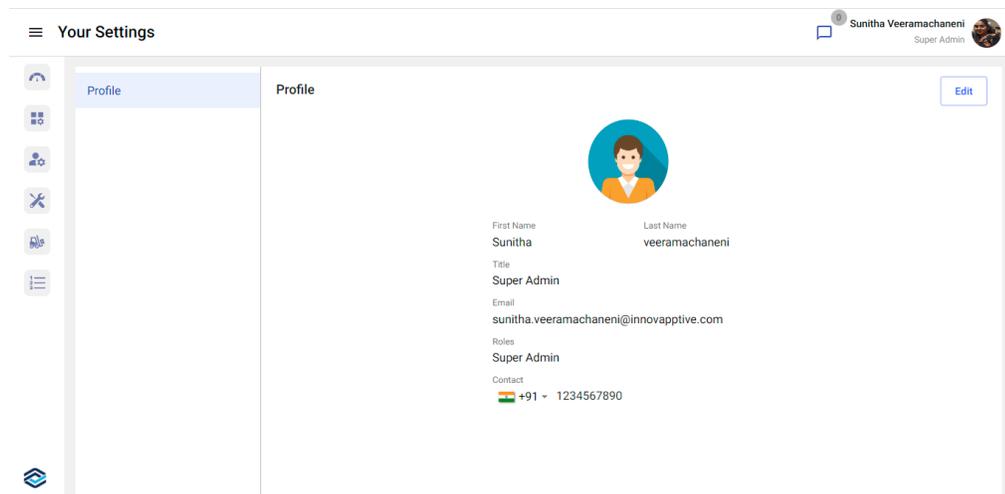
1. Click the Profile Picture on the top right and select **Profile**.

Figure 3-2 Open User Profile



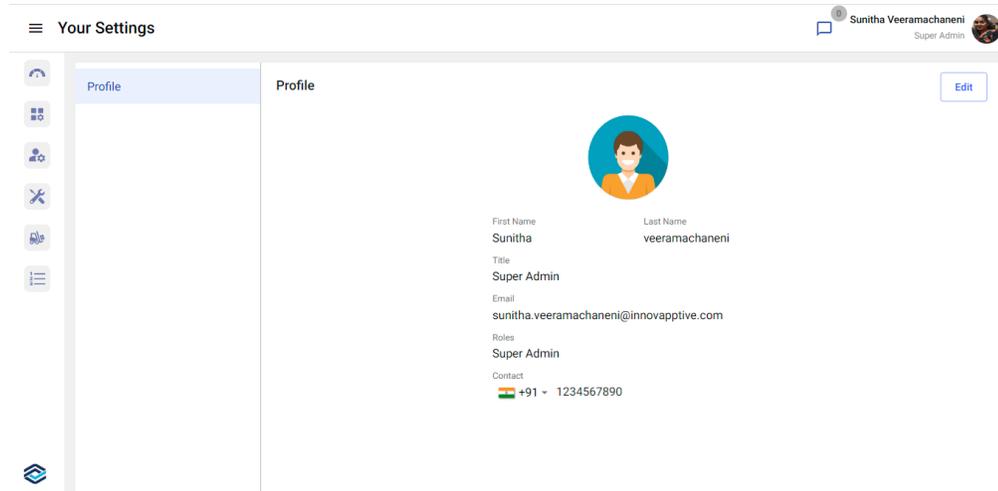
2. Click the **Edit** button.

Figure 3-3 Update 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



Profile updated successfully.

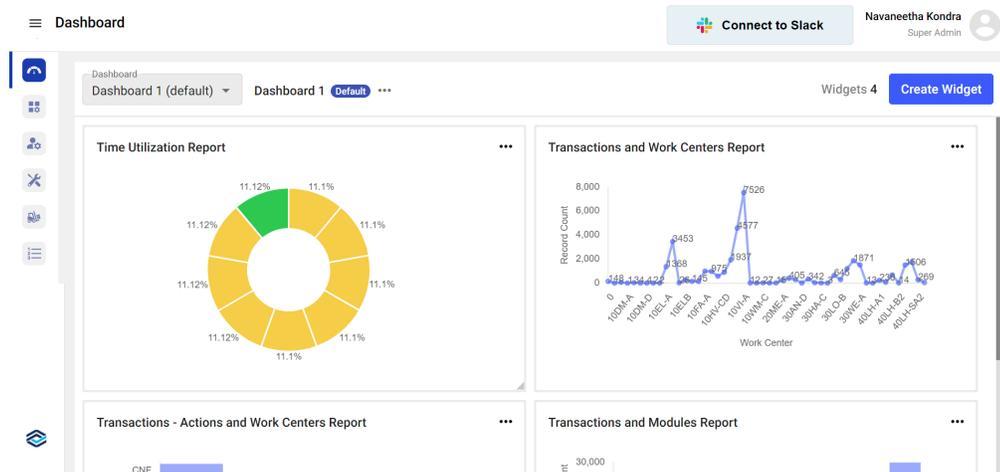
3.3. How to connect to Slack

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:

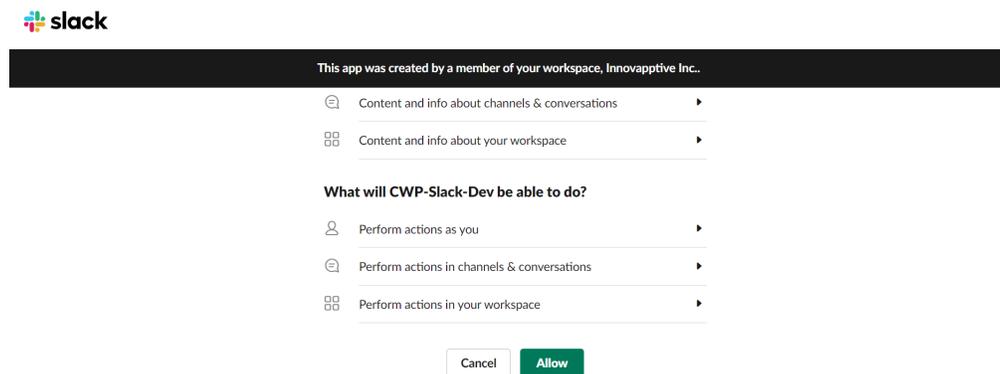
1. Click the **Connect to Slack** button on the top right.

Figure 3–5 Connect to Slack



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

Figure 3–6 Approve Slack Connection



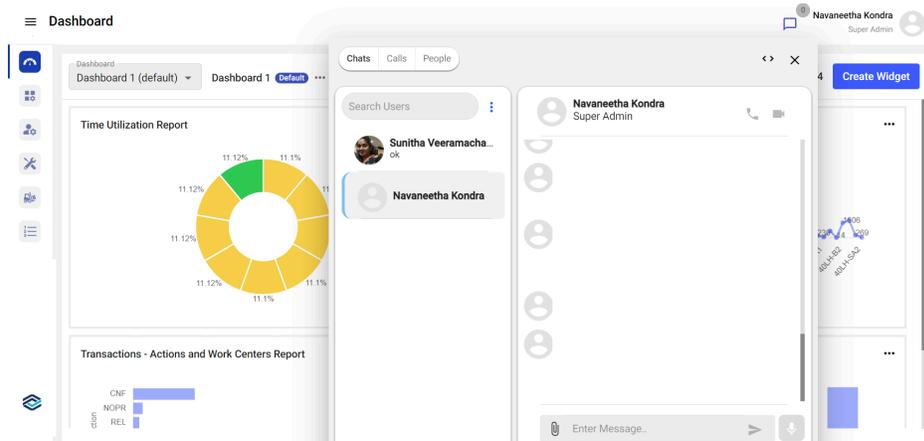
A message  icon appears on the top right. You can see the notifications on top of the icon whenever you receive a message.

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

| 3 - Application Functionalities

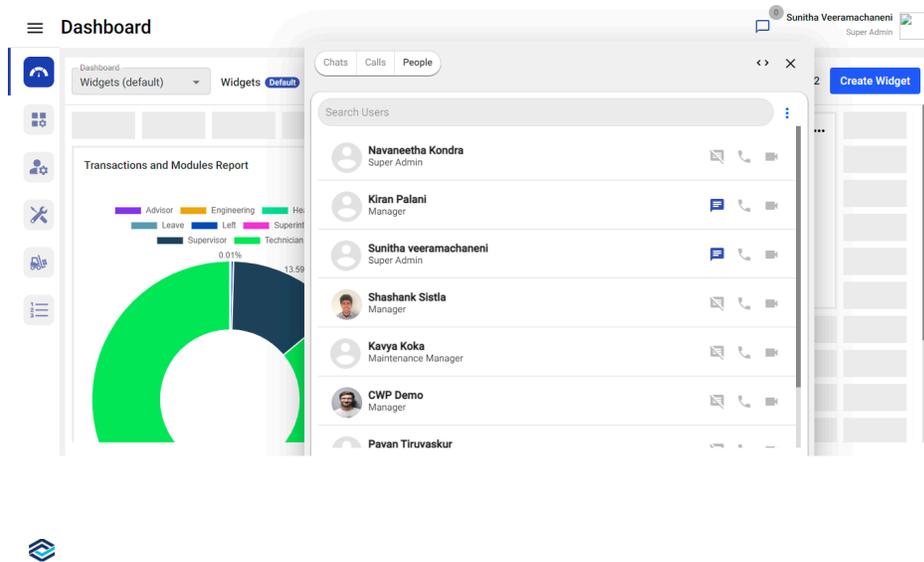
- a. Click the **Chats** tab to send a message and to see the recent chats and sent messages.
You can also add attachments by clicking the Attachment icon in the message box.

Figure 3-7 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.



Note:

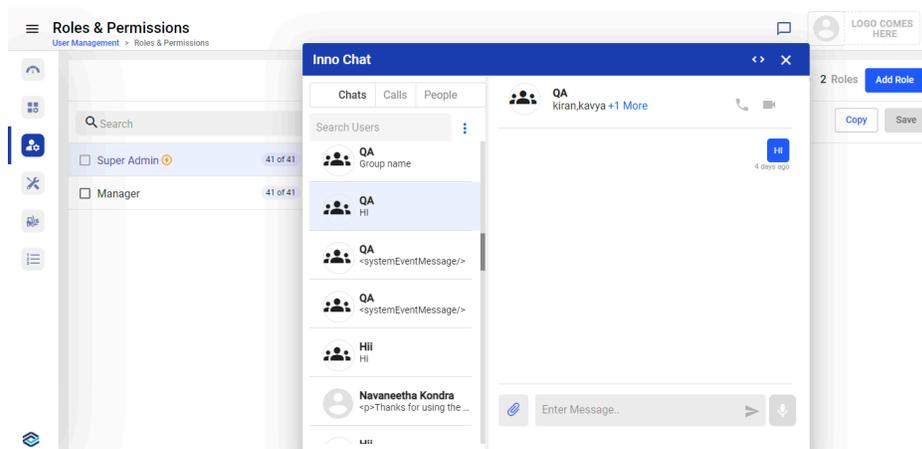
To connect with MS Teams, you should select the **Collaboration Type** as **MS Teams**.
For more information, see [How to create Tenant/Super Admin role](#) (on page).

To connect to MS Teams:

| 3 – Application Functionalities

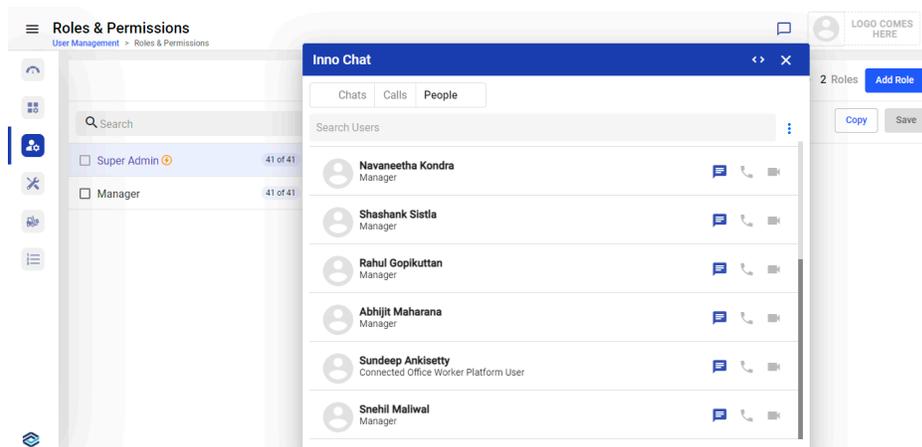
1. Login to the application using Microsoft credentials (for example, abc@ym27j.onmicrosoft.com).
2. Click the message  icon on the top right corner.
3. In the MS Teams Chat window,
 - a. Click the **Chats** tab to send a message and to see the recent chats and sent messages.
You can also add attachments by clicking the Attachment icon in the message box.

Figure 3–9 MS Teams Chat Window



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

Figure 3–10 Search People



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

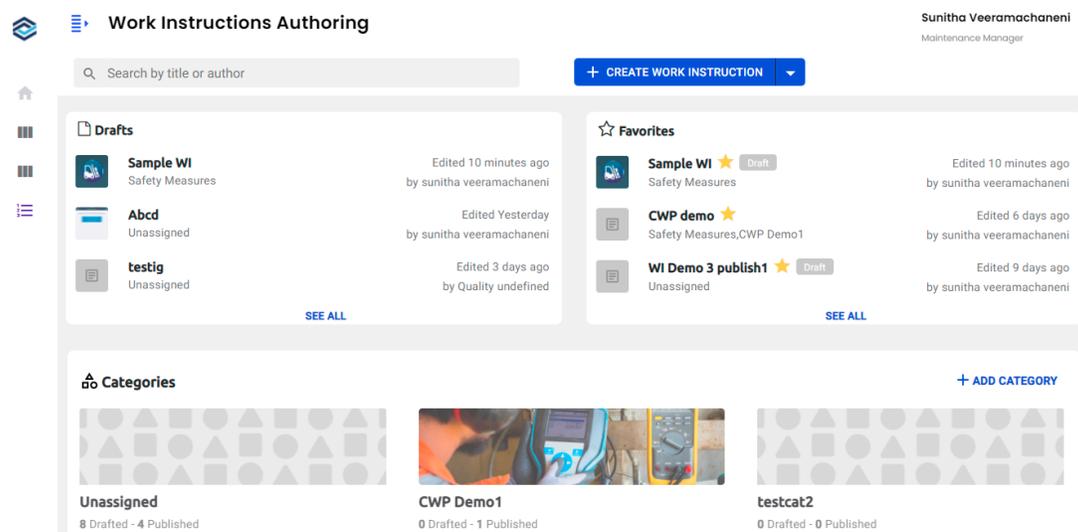
Use the **Work Instructions Authoring** module to create digital work instructions for technicians to work on a work order.

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.

Figure 4-1 Work Instructions Authoring Dashboard



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.

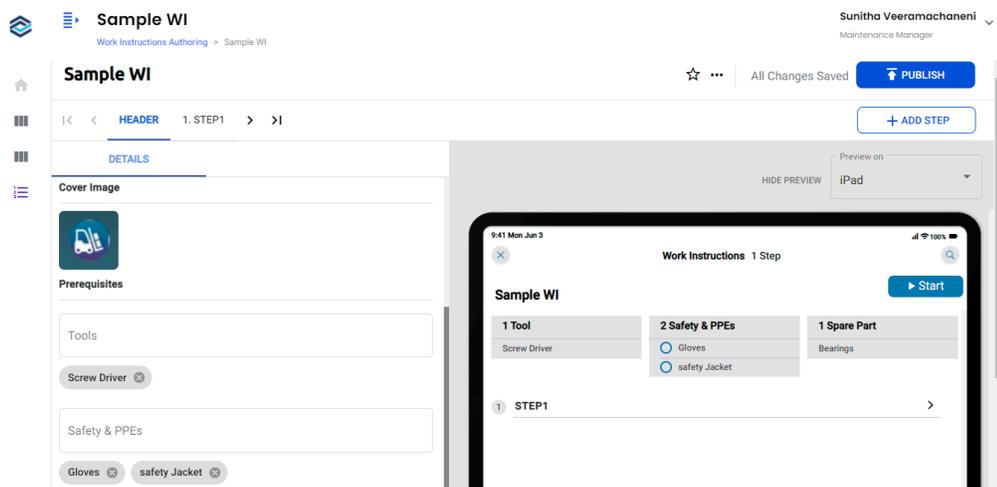
To create work instructions:

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

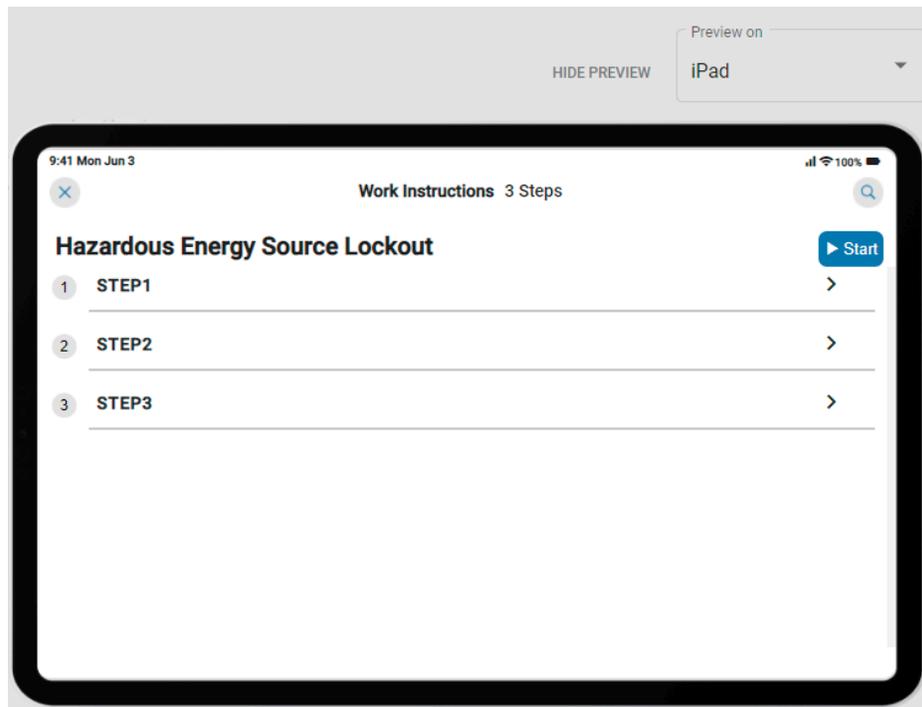
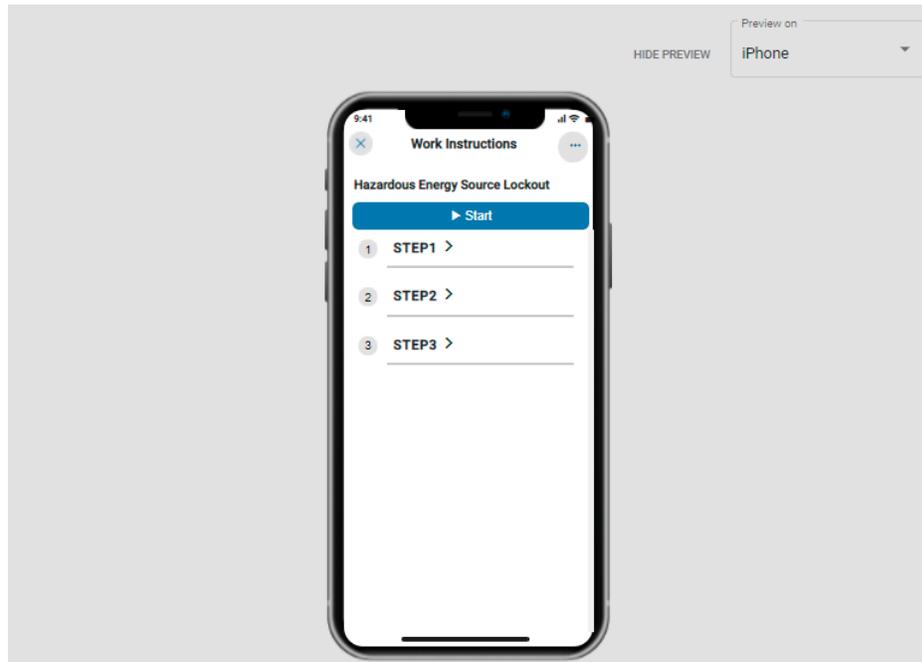


Figure 4-4 iPhone Preview



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,
- In the **Assignments** section, select **Categories** and **Assigned Objects** from the drop downs.

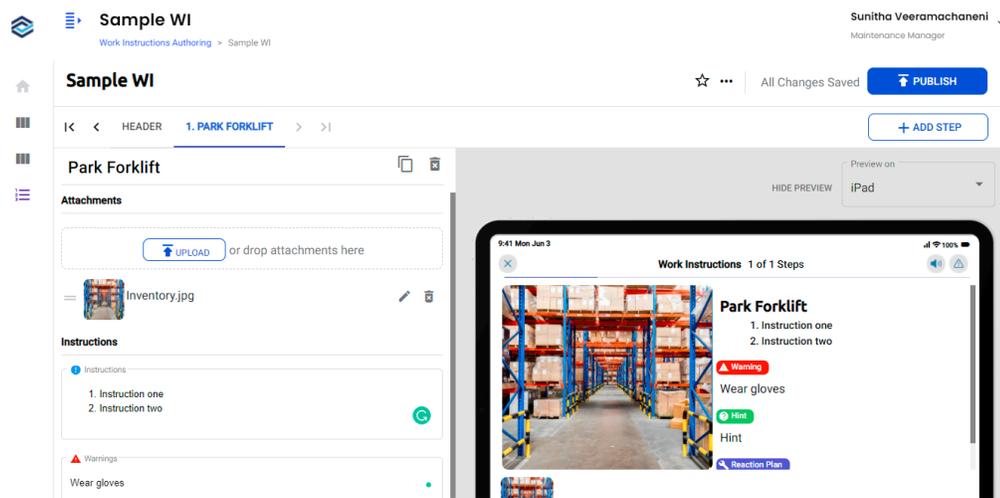


Note:

- If you do not assign any specific category, it adds under the Unassigned category.
- You can select only **Order Number** and **Order Type** in the **Assigned Objects** drop down.

- Click **Cover Image** to add a cover image.
 - 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



In this tab, you can,

- Clone or copy the step using the Clone Step  icon.
 - 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.
 8. 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 \(on page 26\)](#).

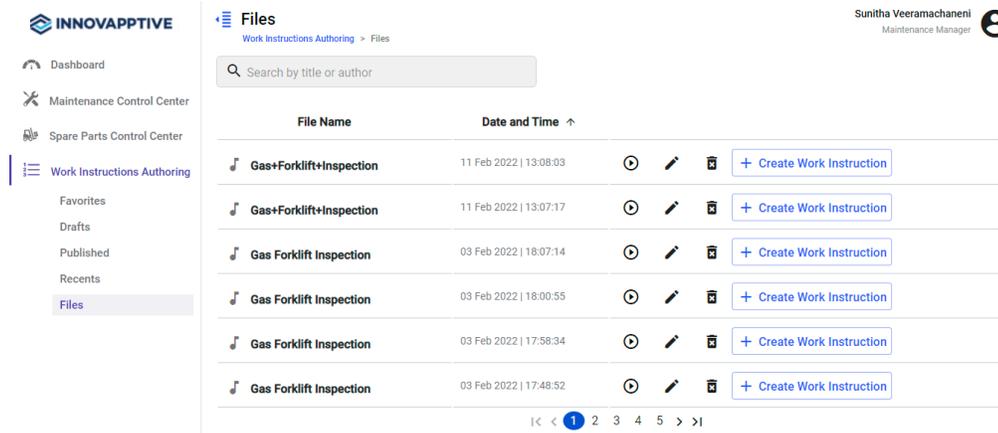
4.2. How to create Work Instructions from Audio Files

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



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.
- Sort the work instructions using the Sort  icon next to the columns.
- Play the audio file using the Play  icon.
- Edit the audio file name using the Edit  icon.
- 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.

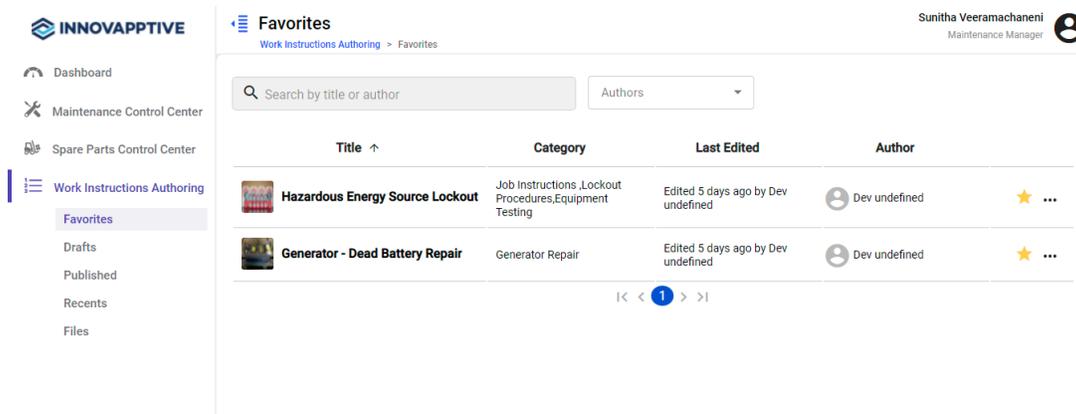
To access the work instructions that are marked favorite:

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

 **Note:**

To see Favorites, click Hamburger  menu on the top left and then click the Expand  icon next to Work Instructions Authoring.

Figure 4-7 Access Favorite 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  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**.

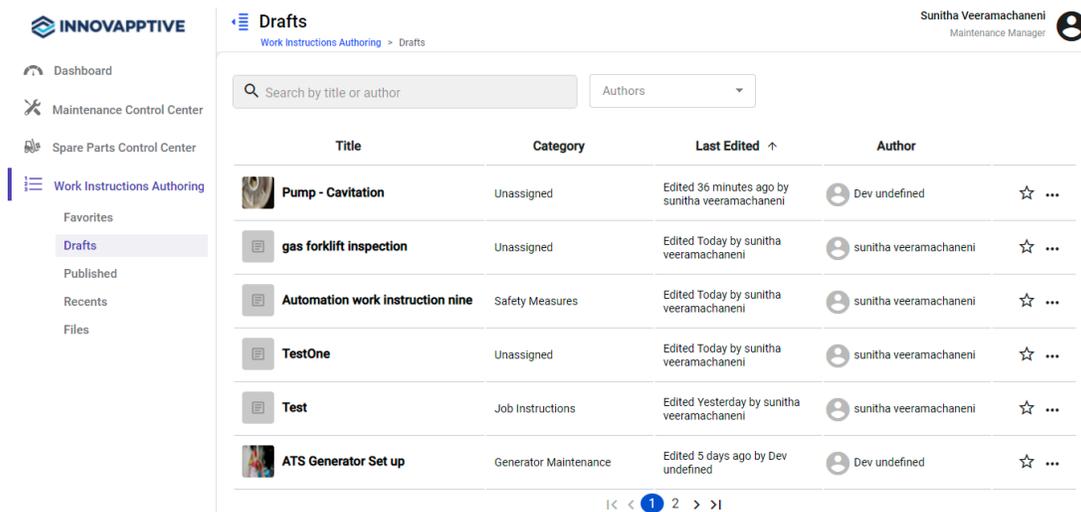
4.4. How to access Work Instructions in Draft mode

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 authoring work instructions.

To access the drafted work instructions:

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

Figure 4-8 Access Drafted Work Instructions



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 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

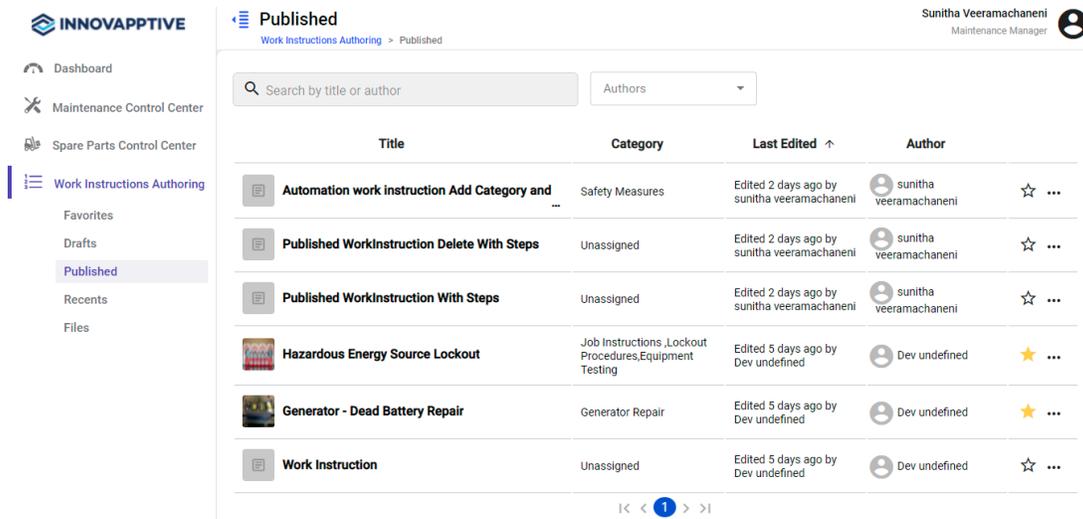
You can access the work instructions that are published from the Published screen.

| 4 - Get started with of Authoring Work Instructions

To access work instructions that are published:

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

Figure 4-9 Access Published Work Instructions



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  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**.

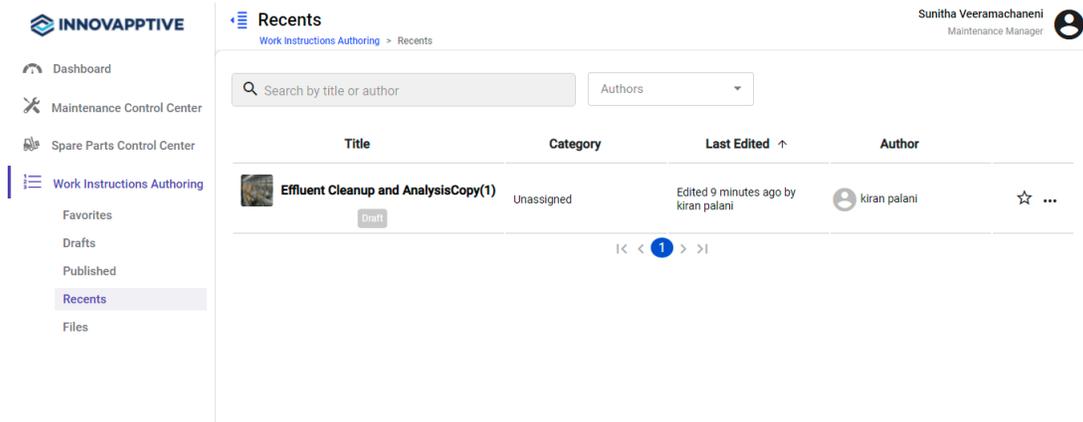
4.6. How to access Recent Work Instructions

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.

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  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**.