Work Instructions Configuration Guide

Connected Worker Solutions

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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.
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

Related Products & Solutions

- iMaintenance Configuration Guide
- mRounds Configuration Guide

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1. Introduction

The Digital Work Instructions (DWI) Configuration Guide is your blueprint for defining how Digital Work Instructions operate across your organization.

Once DWI is enabled within iMaintenance and/or mRounds, this guide helps you transform the out-of-the-box capability into a structured, governed, and operationally aligned system tailored to your plants, maintenance practices, and compliance requirements.

Unlike deployment and infrastructure setup—which are typically managed by IT—this guide focuses on **functional configuration**. The settings described here determine how Work Instructions are created, controlled, accessed, versioned, secured, and made available to Supervisors and Operators across web and mobile applications.

From enabling DWI modules and configuring centralized repositories, to defining roles and permissions, AI capabilities, localization, and mobile navigation behavior, each section of this guide helps you align DWI with how your organization standardizes procedures, manages knowledge, and enforces safe execution in the field.

With this guide, you will:

- **Establish the foundation** → Enable DWI, configure tenant-level controls, and define environment behavior across iMaintenance and mRounds.
- **Control access and governance** → Create roles, assign permissions, and enforce segregation of duties.
- **Define repository behavior** → Configure centralized or product-specific Work Instruction visibility across 1.0 and 2.0 environments.
- **Manage feature availability** → Enable or disable modules, AI capabilities, and mobile navigation elements.
- **Support global operations** → Configure localization, language management, and platform-level settings.
- **Ensure operational alignment** → Align DWI behavior with plant structures, asset hierarchies, and maintenance workflows.

To set up the following configurations, refer to the mRounds and iMaintenance configuration guides:

- Manage user roles and permissions
- Maintain Master Data
- Customer Tenant Onboarding with Azure IDP
- Authentication Identity Configuration
- Log in to the Application
- Single Sign-On (SSO: Google or Microsoft)
- Troubleshoot Login Issues
- Configure Session Timeout
- Customize Platform Settings

1.1. About the DWI Configuration Platform

DWI configuration is managed through the administrative configuration layer available within iMaintenance and mRounds. This platform allows functional administrators to control how Work Instructions are governed—without custom development.

From a centralized interface and configuration collections, administrators can:

- Enable or disable DWI modules at the tenant level
- Define repository visibility (shared or product-specific)
- Configure AI feature access
- Manage roles and permissions
- Control mobile navigation visibility
- Maintain localization and translation settings

These configurations ensure that Supervisors can create and manage high-quality instructions, while Operators receive controlled, consistent, and policy-aligned guidance during execution.

1.2. Who Should Use This Guide

This guide is intended for Functional and IT Administrators responsible for configuring, governing, and managing Digital Work Instructions across the organization.

- **Functional Administrators / DWI Owners (Primary Audience)** - Responsible for defining module behavior, repository models, user roles, permissions, AI rollout, and governance policies.
- **IT / System Administrators (As Needed)** - Provide support for authentication setup (SSO/IDP), environment URL mapping, database-level configuration flags, and deployment dependencies.

If you create, execute, or provide feedback on Work Instructions, refer to the DWI User Guides for Supervisors and Operators.

If you define how Digital Work Instructions behave across your organization, this is the correct guide.

2. Create Roles and Permissions

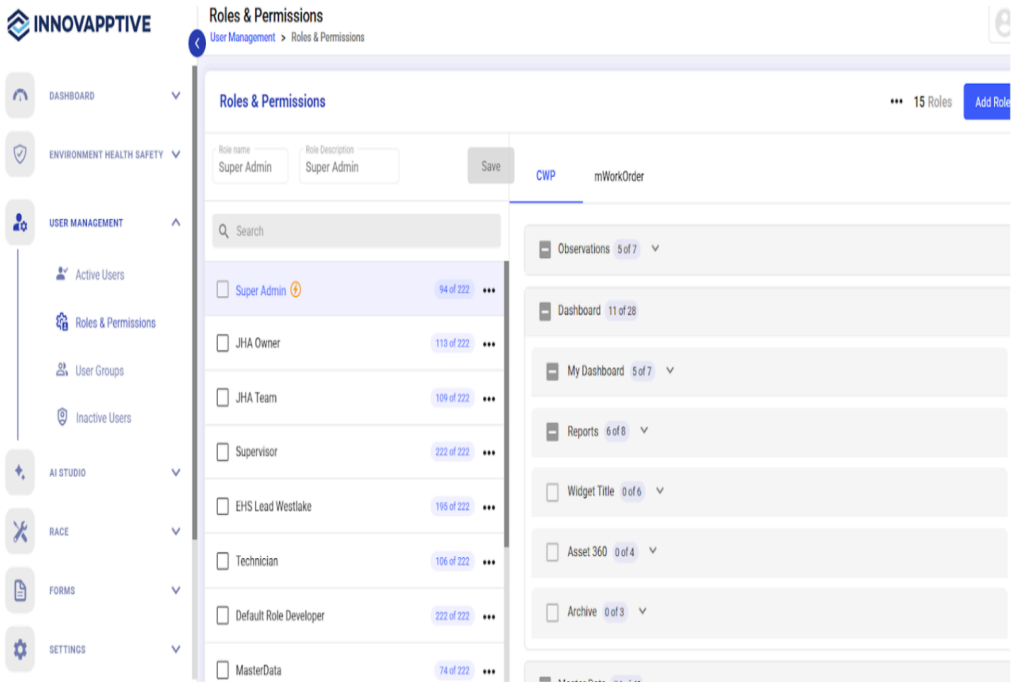
Roles control which Digital Work Instructions (DWI) modules a user can access. Each role defines what a user can view, create, review, approve, issue, or manage within the DWI system.

Roles are typically aligned with DWI personas such as Authors, Supervisors, and Operators/ Technicians.

To create a role and assign permissions:

1. Navigate to **User Management** > **Roles and Permissions**.

Figure 2-1 Create Roles and Permissions



2. Click **Add Role**.
3. Enter the **Role Name** and **Role Description**.
4. Click **Save**.
5. Select the new role from the list.
6. Select the modules and permissions that are required for the role or persona on the right-side.
7. Click **Save**.

2.1. Manage Existing Roles

To manage existing roles:

1. Use the **More** icon > **Copy** to clone an existing role and modify it for a new persona.
2. Use the **More** icon > **Delete** to remove a role that is no longer required.

> **Note:**
> - The Super Admin role **cannot** be edited or deleted. It can only be copied.
> - You **cannot delete a role** that is currently assigned to users. Unassign users first, then delete the role.
> - You cannot delete roles that are assigned to users or edit the Super Admin role.
> - Assign permissions carefully to ensure segregation of duties — for example, the same user should not both issue and authorize permits unless required by policy.

Best Practice for DWI Role Design

Align roles with responsibilities:

- **Author** - Create, edit, archive, view, publish, restore, duplicate, auto-assign DWIs, and view feedback
- **Work Instruction Reviewer / Supervisor** - Create, edit, archive, view, publish, restore, duplicate, auto-assign DWIs, and view feedback
- **Work Instruction Consumer (Technician/operator) on mobile** - View, execute, submit feedback, and upload attachments in feedback
- **Admin** - Create, edit, archive, view, publish, restore, duplicate, auto-assign DWIs, and view feedback

3. Configure DWI Core Settings

The Core Settings in Digital Work Instructions (DWI) define how major DWI capabilities are made available across your organization. These settings determine whether Supervisors and Operators can access and use specific DWI modules, such as creating, managing, and executing Work Instructions.

Although these configurations are applied at the system level, they directly impact how Supervisors create and manage instructions and how Operators access and execute them during daily operations.

Functional teams should review these settings to ensure they align with plant workflows, maintenance practices, and compliance requirements. IT or system administrators may assist in applying and validating the configuration changes.

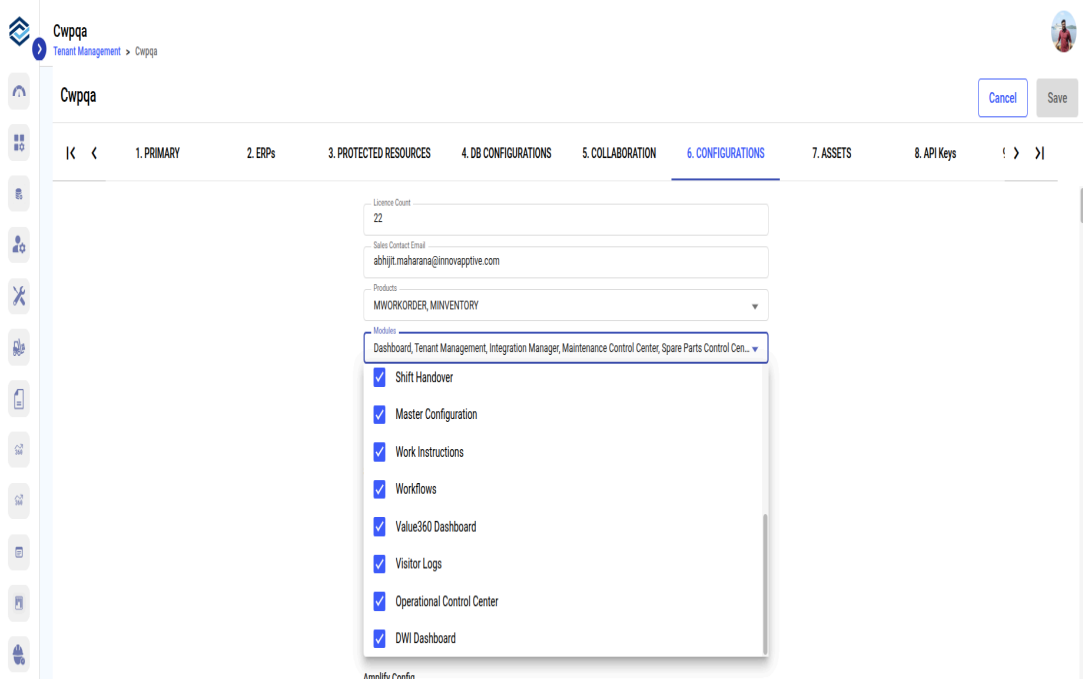
By configuring DWI Core Settings appropriately, you ensure controlled feature rollout, consistent user experience, and alignment with operational standards across plants.

Collection Details

Configuring in mRounds

In mRounds, navigate to **Tenant Management** and click on **Configurations**.

Figure 3-1 Collection Details (mRounds)



Configuring in iMaintenance

In **iMaintenance**, to modify these configurations, use the **Configuration collection** in the database. Each configuration is identified by its respective type.

- Collection Name: **Configuration**

Enable or Disable Modules in iMaintenance

DWI modules can be enabled or disabled at the tenant level. These settings determine whether the modules are visible and accessible to all users across web and mobile applications. Use the tenantLevel flag to control module availability globally across all plants.

tenantLevel Flag

Purpose: Controls module access at the Tenant level.

Options:

- true: Enables the selected DWI module for all plants under the tenant.
- false: Disables the selected DWI module globally across all plants.

Default Value: true

Set tenantLevel to:

- true if you want all plants to access the DWI module.
- false to completely disable the DWI module across the tenant.

Impact of Disabling the DWI Module

If disabled:

- Supervisors cannot create or manage Work Instructions.
- Work Instructions cannot be linked to Rounds.
- Operators cannot access or execute Work Instructions.
- Version management, feedback review, and archive functions are unavailable.

Disabling the module effectively removes DWI functionality from both Supervisor and Operator workflows.

4. Work Instructions Repository and iFrame Integration Model

Work Instructions can be created in both the iMaintenance (2.0) environment and mRounds (1.0). All Work Instructions are stored and maintained in a centralized repository in 2.0, which serves as the single source of truth.

mRounds accesses Work Instructions through an embedded iFrame, ensuring the same instructions are available across environments without duplication.

Repository and Availability Model

The repository and availability of a Work Instruction depend on the tenant configuration and the product selection made at the time of creation.

- If the customer has both tenants, the user must select the product(s) where the Work Instruction should be stored and used.
- Based on this selection:
    - mRounds only → The Work Instruction is stored in the mRounds repository and is available only in mRounds.
    - iMaintenance only → The Work Instruction is stored in the iMaintenance repository and is available only in iMaintenance.
    - Both products selected → The Work Instruction is stored in a central repository and is available across both products.

This approach ensures controlled visibility while still supporting a shared repository when required.

Metadata Handling

- Core Work Instruction content remains consistent.
- Metadata may be product-specific and depend on the consuming application.

Configuration Requirements

To access Work Instructions across environments, the following configuration is required:

- 2.0 environment URL mapping
- Token-based authentication
- Context parameters passed from the consuming application:
    - Plant
    - Unit
    - Work Center
    - Equipment
    - Functional Location
- iFrame embedding configuration

Note:
Auto-assignment is not supported in mRounds; users must manually assign Work Instructions.

5. Configure Bottom Navigation (Mobile)

The Bottom Navigation configuration controls whether the Work Instructions tab is visible in the DWI mobile application.

This configuration is flag-based and is managed at the system configuration level.

Configuration Behavior:

- When the flag is set to true, the Work Instructions tab is visible in the bottom navigation for all Operators and Supervisors.
- When the flag is set to false, the tab is hidden.

Sample Configuration in mRounds (System Level):

```
{ "isDwiEnabled": true }
```

6. Configure AI

The AI configuration controls the availability of AI-powered features in DWI at the plant level.

Supervisors/Authors can selectively enable or disable individual AI agents based on rollout strategy and readiness.

Note:

- AI configurations are stored in the database and can be customized per tenant.
- Ensure consistent settings across modules and levels to avoid unexpected behavior in AI feature availability.

7. Manage Localization

The Localization feature allows administrators to manage language translations for Innovapptive products across web and mobile applications.

It is commonly used to translate UI labels, messages, and form text into regional languages or to align terminology with site-specific safety and operational vocabulary.

To add a new language:

1. Expand **RACE** and click **Localization**.
2. Click **Add Language** and select **Add Manually**.
3. In the Add Language window, select the **Language** and **applicable Products**.
4. Click **Done**.

   The newly added language appears in the list.
5. Click the **More** icon and select **Edit**.

   You can view the total translated string count for that product in its released version.
6. Translate all the strings for the selected language.
7. Click the **More** icon on the top right.
   - Select **Clear All Strings** to clear all strings at once.
   - Select **Refresh AI Translations** to use AI suggestions and clear them if needed.

   Tip: Enable the **Show Empty Strings** toggle at the bottom to quickly identify untranslated strings.
8. Once all the strings are translated, click **Publish**.

   Additional Localization Options:

   In the Localization screen, you can also:
   - Use the Product drop-down to view:
     - All Products (default), or
     - Individual products (for example, CWP Web, iMaintenance Mobile, etc.)
   - Sort languages using the Sort icon on any column header.

- View the total number of configured languages (for example, “18 Languages”) at the top.
- Use the **Search** bar to quickly locate a specific language or product. Apply filters using the Filter icon (for example, Last Modified On, Last Modified By).
- Click **Add Language** > **Upload Excel** to upload translations using an Excel template.
- Click the **More** icon and select **Download Excel Template** to download the template.