

Work Instructions User Guide for Supervisors

Connected Worker Solutions



Title and Copyright

Copyright and **Terms of Use** page for **Connected Back Office**.

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

Release Version: 2601

Release Date: 16 February 2026

Published Date: 16 February 2026

Document Version: 1.0

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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 operators or 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

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1. Introduction to Digital Work Instructions

The **Digital Work Instructions (DWI)** module helps you capture, organize, and share standardized procedures. It eliminates the confusion of outdated paper manuals and bridges the knowledge gap between new hires and experienced veterans.

You create a **single source of truth** for every task. You define the standard once, and every technician has instant access to the current version on their device.

What You Can Do:

- **Capture Knowledge:** Build instructions fast by recording a video, importing documents, or writing steps from scratch.
- **Set Standards:** List exactly what tools, parts, and safety equipment (PPE) are needed before work starts.
- **Show Quality:** Add photos, warnings, and expert tips to show clearly what "done right" looks like.
- **Control Versions:** Push updates to the whole team immediately—no more reprinting paper.

Why It Matters: By using a standard process, you reduce rework, speed up training, and ensure the job is done safely and correctly across every shift.

2. Create Work Instructions

You can build digital work instructions for your operators or technicians using one of three ways, depending on your existing resources and the complexity of the task:

- **Create From Video:** Use this method when explaining complex tasks. Record a video (or upload an existing one), and the Digital Work Instructions module automatically writes the steps for you.
- **Create From Document:** Use this method when you have existing procedures in PDF, Word, or text format. Upload your PDF or Word files, and the system converts them into a mobile-friendly format in seconds.
- **Create From Scratch:** Use this method for brand-new procedures or when you require complete control over wording and sequence.

Selecting an input method is only the first step. Whether you are importing legacy PDFs or using AI to transcribe a video, the raw data must be refined to ensure safety and clarity. The tool handles the format, but you must verify the content to ensure it drives the right operator behaviors.

Best Practices for High-Quality Instructions

Great instructions don't just list steps—they prevent mistakes. Use these guidelines to create procedures that are impossible to misunderstand.

Write with Precision (The "One Action" Rule)

Technicians or Operators scan text; they don't read novels. Keep steps atomic and specific.

Goal	Do This	Not This
One Action per Step	"Remove the four mounting bolts."	"Remove the bolts and lift the cover off."
Be Specific	"Tighten to 25 ft-lbs using a torque wrench."	"Secure the bolt."
Define Success	"Fill the reservoir to 3.5 quarts (between MIN and MAX)."	"Add fluid."
Identify Tools	"Using a 3/8 socket, remove the drain plug."	"Remove the drain plug."

Visuals: Show, Don't Just Tell

A photo confirms what "good" looks like. Use images for complex assemblies, critical positioning, or verification checkpoints.

- **Focus on Detail:** Zoom in. A photo of the entire machine doesn't help when the instruction is about a specific valve.
- **Caption Clearly:** Don't just label an image "Alignment." Say: "Align the red dot on the gear with the notch on the housing."
- **Consistency:** Take photos from the technician's perspective (angle of view) so it matches what they see.

Structure for Readability

If a procedure has more than 10 steps, a giant numbered list is overwhelming. Group steps into Sections (3–7 steps each) to create mental checkpoints.

- **Good Section Names:** "Preparation and Lockout," "Disassembly," "Inspection."
- **Bad Section Names:** "Part 1," "Part 2," "Steps 1-10."

Pro Tip: Instructions are living documents. Review safety procedures every 6 months and update general procedures annually or whenever a technician flags an issue.

2.1. Create Work Instructions from a Video Recording

Use this method when you have a recording of the task. The AI analyzes the video, transcribes the narration, and automatically builds a step-by-step draft for you to review.

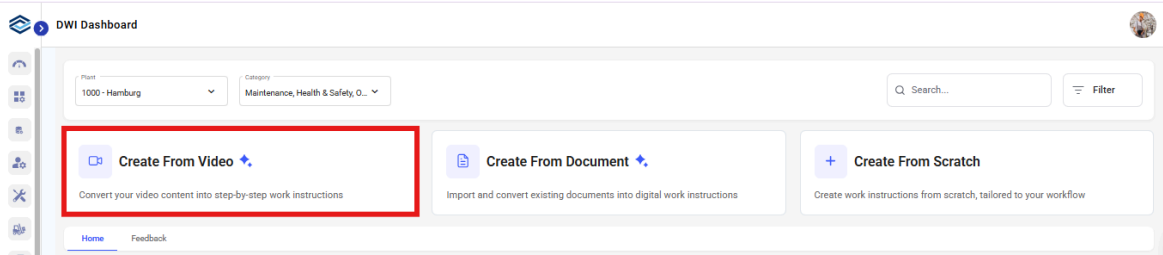
To ensure the AI captures the steps accurately, check these requirements before you upload:

- **Audio Matters:** The person in the video must narrate their actions clearly as they work so the AI can transcribe the instructions.
- **Show Everything:** Ensure the video captures the complete procedure from start to finish without gaps.
- **Check Format:** Use a standard video file (MP4 or WebM) and keep the file size under 100MB.

To create work instructions from a video recording:

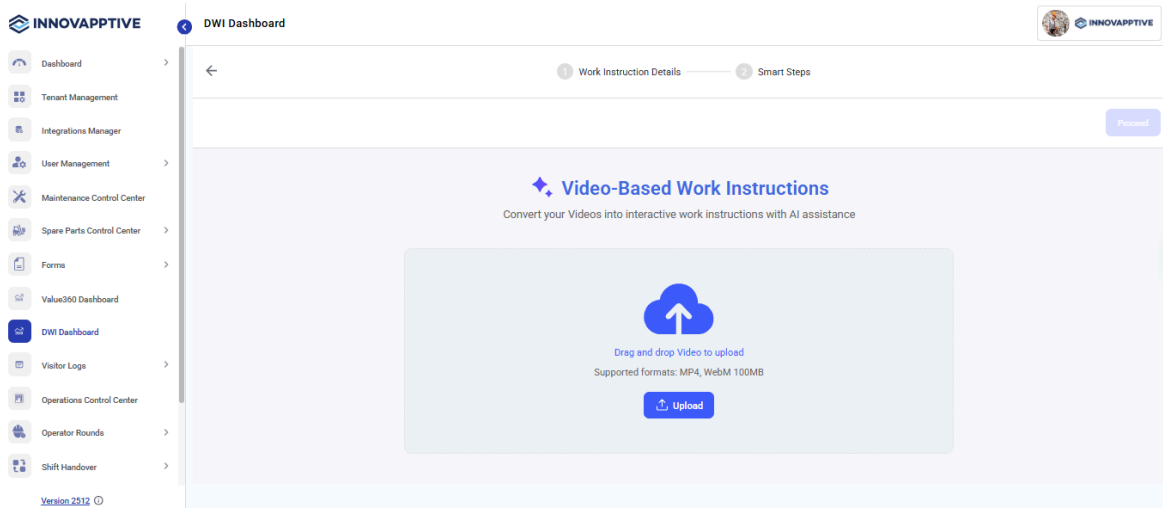
| 2 - Create Work Instructions

1. Click on **DWI Dashboard** on the left-side menu.
2. Click **Create From Video**.



3. Click **Upload** and select your video.
4. Click **Proceed**.

Once you upload your video, the AI analyzes it and generates a draft. Processing depends upon the size of the video. If the video is silent, the AI may miss context.



5. In the **Overview** section,
 - Provide relevant **Title** and **Description**.
 - Select the relevant Plant, Unit/Work Center, Location/Functional Location, Asset Class, Asset, Category, Task List (in iMaintenance), and Tags.



Note:

When a supervisor or senior operator/technician adds an operation, the associated work instructions are automatically added along with the task list/operation.

| 2 - Create Work Instructions

Work Instruction Details

All Changes Saved **Proceed**

Overview

Title *
test size 43

Description
Enter

Plant*
1000 - Hamburg

Work Center
Select

Functional Location
Select

Asset Class
Select

Asset
Select Assets

Category*
Maintenance

Task List
Select

Uploaded Video

0:00 / 2:00

Thumbnail

6. In the **Prerequisites** section, list all required **Tools** and **Safety & PPEs** including the ones that weren't explicitly mentioned in the video.
7. In the **Additional Details** section, add relevant details in the **Label** and **Value** fields like **Line Number, Department**, or other context-specific information.

Prerequisites

Tools
Select

Safety & PPEs
Select

Additional Details

Add relevant details like Line Number, Department, or other context-specific information. **Add**

Label
e.g., "Line"

Value
e.g., "SG04/SG05" x

8. Click **Proceed**.

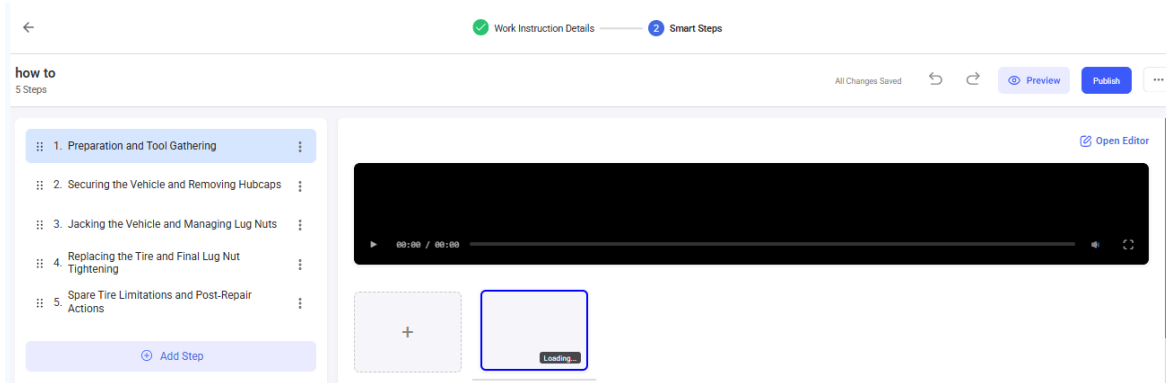
The AI uses the video's audio to create steps. Review the generated list to ensure accuracy:

9. Click any step to edit the **Instructions**.

These are core procedural steps that describe **WHAT** to do and **HOW** to do it.

- Tap on the title to modify it.
- Edit the text to reword vague descriptions or fix errors.
- If a step contains multiple tasks, click on **Add Step** to split them to make it easy to understand.

Example: "Remove bolts on top and bottom of rolls, using punch, push up to remove shafts"



10. Click **Add New Section** to add **Hints**, **Warnings**, or **Custom Section**.

- **Warnings:** Highlight critical safety information, hazard alerts, and mandatory safety procedures that prevent injury, equipment damage, or process failures.

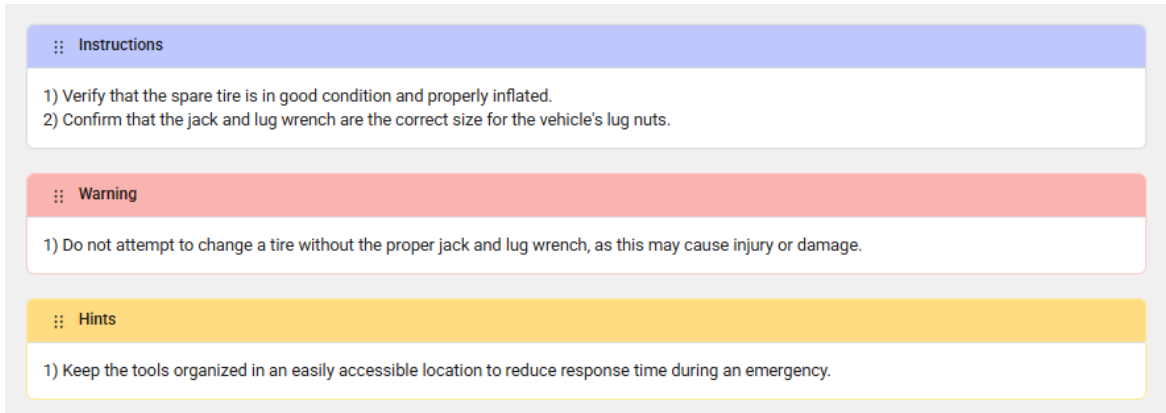
Example: "Closely monitor these steps to prevent overfilling the tanks"

- **Hints:** Add helpful tips, best practices, troubleshooting guidance, and additional context that improves execution quality, efficiency, or success rate.

Example: "Use tie wire to tie the used rolls together and put on pallet to be redressed"

- **Custom Section:** Add context-specific content that doesn't fit standard categories but serves important purposes in industrial work instructions.

*Example: **VERIFICATION/TESTING** for **quality control checks** and **validating steps** or **TROUBLESHOOTING** for **problem diagnosis** and **solution steps**.*



11. Click **Preview** to check how the content appears across different formats, including mobile, tablet, and PDF.
12. Click **Publish**.

The instructions are now live and saved with embedded video timestamps for future reference.

2.2. Create Work Instructions from a Document

Use this method when you have an existing procedure document (PDF, Word, or text file). The AI extracts the procedure and converts it into structured, step-by-step instructions for you to review.

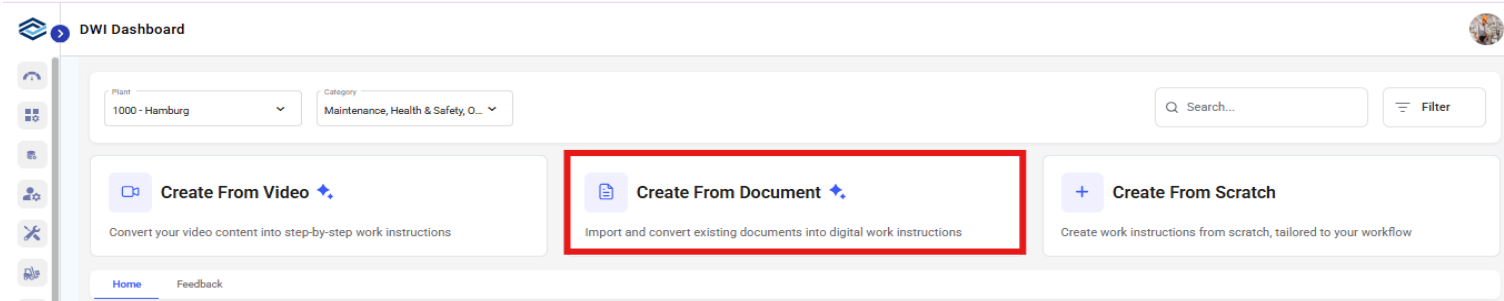
To ensure the AI captures the steps accurately, check the requirements below before you upload:

- **Check Format:** Ensure your source document is in PDF, .doc or .docx format.
- **Clear Structure:** Documents with numbered steps, bullet points, or clear headings are easier for the AI to process accurately.

To create work instructions from a document:

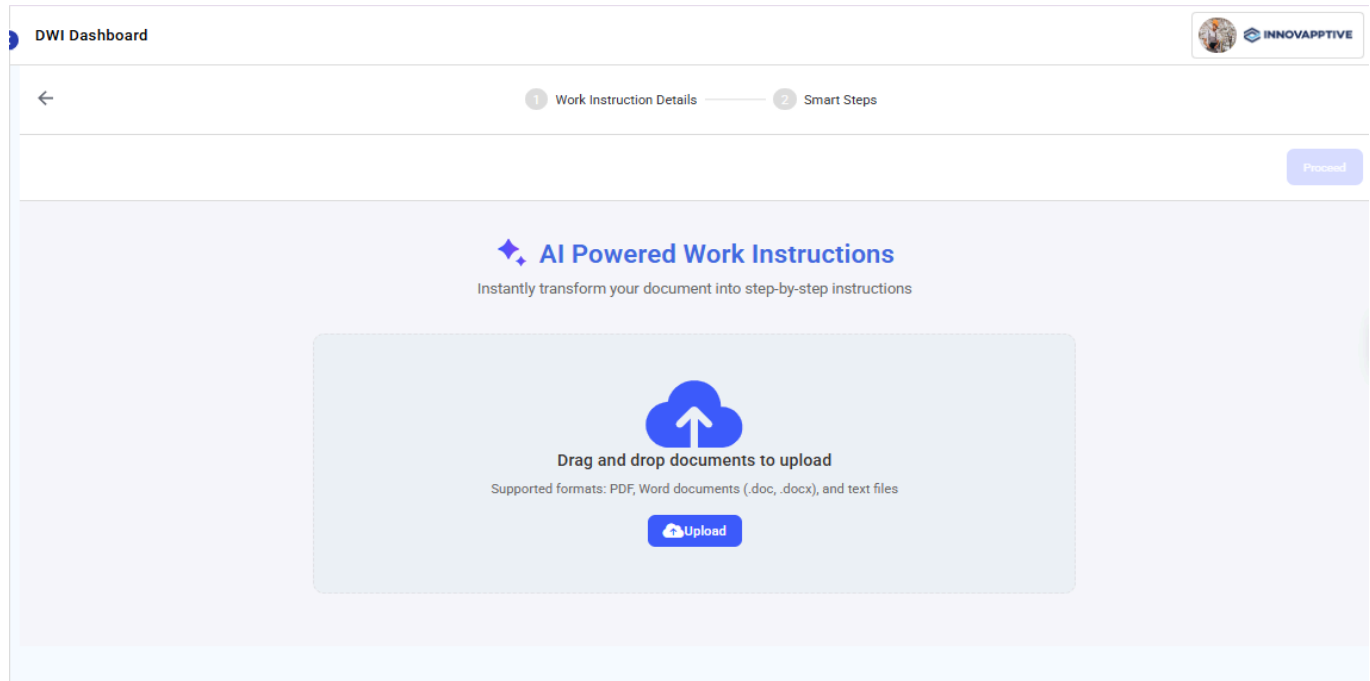
| 2 - Create Work Instructions

1. Click on **DWI Dashboard** on the left-side menu.
2. Click **Create From Document**.



3. Click **Upload** and select your document.

Figure 2-1 Upload Document



4. Click **Proceed**.

Once you upload your document, the AI analyzes it and generates a draft. Processing depends upon the size of the document.

5. In the **Overview** section,

- Provide relevant **Title** and **Description**.
- Select the relevant Plant, Unit/Work Center, Location/Functional Location, Asset Class, Asset, Category, Task List (in iMaintenance), and Tags.



Note:

When a supervisor or senior operator/technician adds an operation, the associated work instructions are automatically added along with the task list/operation.

6. In the **Prerequisites** section, list all required **Tools** and **Safety & PPEs** including the ones that weren't explicitly mentioned in the video.
7. In the **Additional Details** section, add relevant details in the **Label** and **Value** fields like **Line Number, Department**, or other context-specific information.

The screenshot shows two sections of a form. The top section is titled 'Prerequisites' and contains two dropdown menus: 'Tools' and 'Safety & PPEs', both with 'Select' as the current value. The bottom section is titled 'Additional Details' and includes a blue 'Add' button. Below the button is a sub-header 'Additional Details' and a descriptive sentence: 'Add relevant details like Line Number, Department, or other context-specific information.' Underneath, there are two input fields: 'Label' with the example text 'e.g., "Line"' and 'Value' with the example text 'e.g., "SG04/SG05"'. A small 'x' icon is located to the right of the 'Value' field.

8. Click **Proceed**.
9. Click any step to edit the **Instructions**.

These are core procedural steps that describe **WHAT** to do and **HOW** to do it.

- Tap on the title to modify it.
- Edit the text to reword vague descriptions or fix errors.
- If a step contains multiple tasks, click on **Add Step** to split them to make it easy to understand.

Example: "Remove bolts on top and bottom of rolls, using punch, push up to remove shafts"

10. Click **Add New Section** to add **Hints**, **Warnings**, or **Custom Section**.

- **Warnings:** Highlight critical safety information, hazard alerts, and mandatory safety procedures that prevent injury, equipment damage, or process failures.

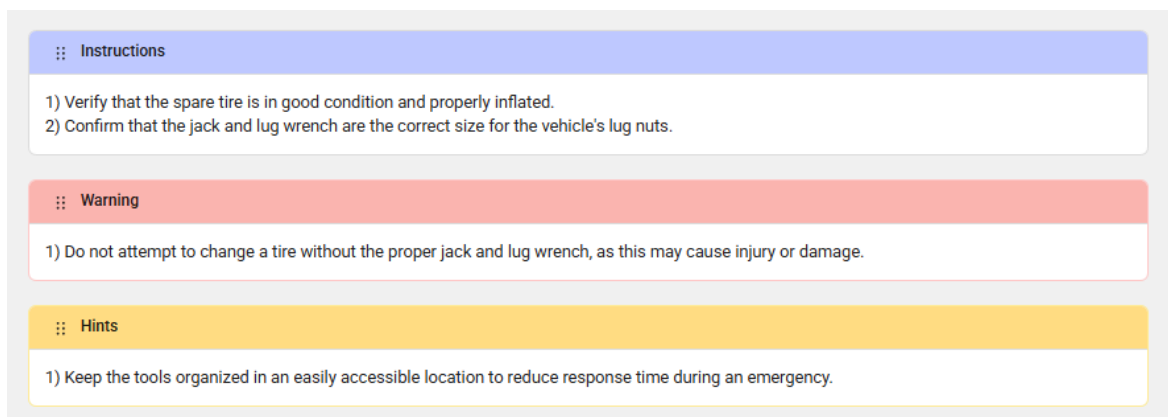
Example: "Closely monitor these steps to prevent overfilling the tanks"

- **Hints:** Add helpful tips, best practices, troubleshooting guidance, and additional context that improves execution quality, efficiency, or success rate.

Example: "Use tie wire to tie the used rolls together and put on pallet to be redressed"

- **Custom Section:** Add context-specific content that doesn't fit standard categories but serves important purposes in industrial work instructions.

*Example: **VERIFICATION/TESTING** for **quality control checks** and **validating steps** or **TROUBLESHOOTING** for **problem diagnosis** and **solution steps**.*



11. Click **Preview** to check how the content appears across different formats, including mobile, tablet, and PDF.
12. Click **Publish**.

2.3. Create Work Instructions from Scratch

Use this method when you are creating a brand-new procedure or need complete control over every detail. Instead of relying on AI extraction, you build the instruction step-by-step from scratch.

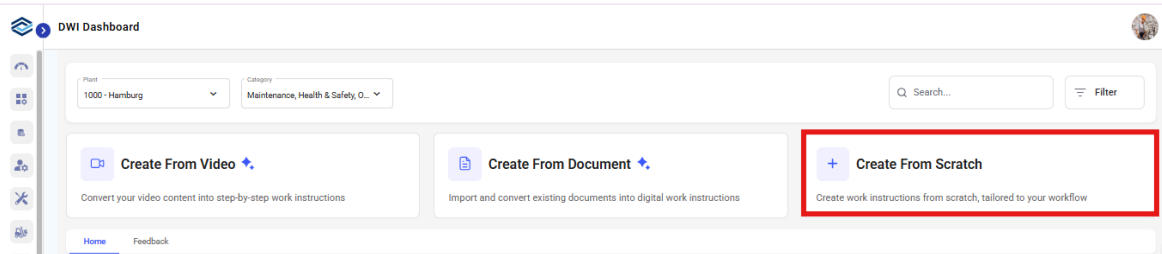
Use this method when:

- **Starting Fresh:** You don't have existing videos or documents to import.
- **Total Control:** You need to phrase specific technical steps with absolute precision.
- **Simple Procedure:** The procedure is short, and writing it is faster than recording a video.

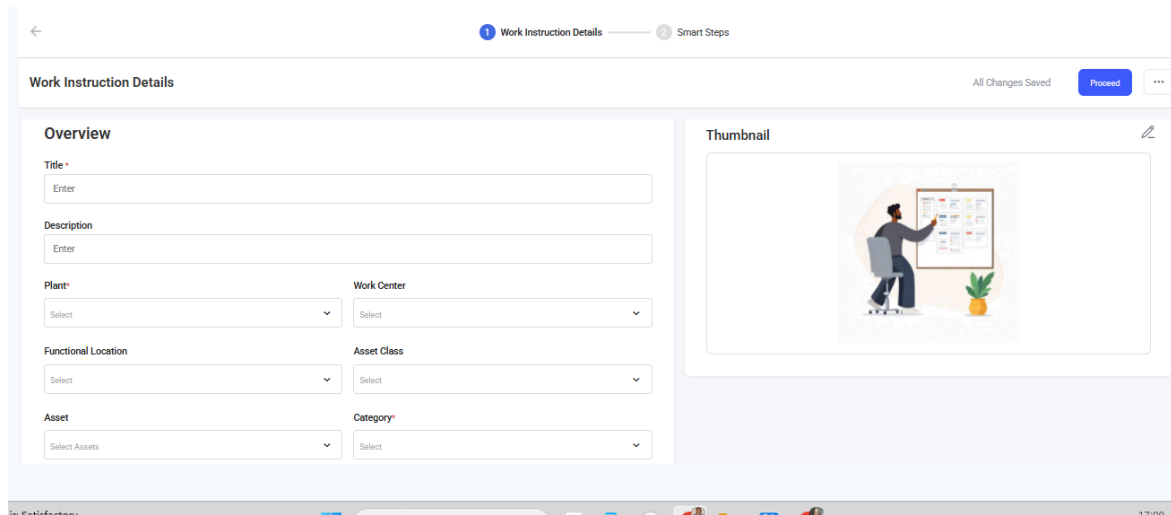
| 2 - Create Work Instructions

To create work instructions manually:

1. Click on **DWI Dashboard** on the left-side menu.
2. Click **Create From Scratch**.



3. In the **Overview** section,
 - Provide relevant **Title** (e.g., "Replace Hydraulic Pump" instead of just "Pump") and **Description**.
 - **Thumbnail:** Add a cover image so technicians can identify the task visually in the app.
 - Select the relevant Plant, Work Center, Functional Location, Asset Class, Asset, Category, Task List, and Tags.



4. In the **Prerequisites** section, list all required **Tools** (e.g., "Torque wrench, 10-150 ft-lbs") and **Safety & PPEs** (protective gear, e.g., "Cut-resistant gloves") including the ones that weren't explicitly mentioned in the video.
5. In the **Additional Details** section, add relevant details in the **Label** and **Value** fields like **Line Number**, **Department**, or other context-specific information.

Prerequisites

Tools

Safety & PPEs


Additional Details Add

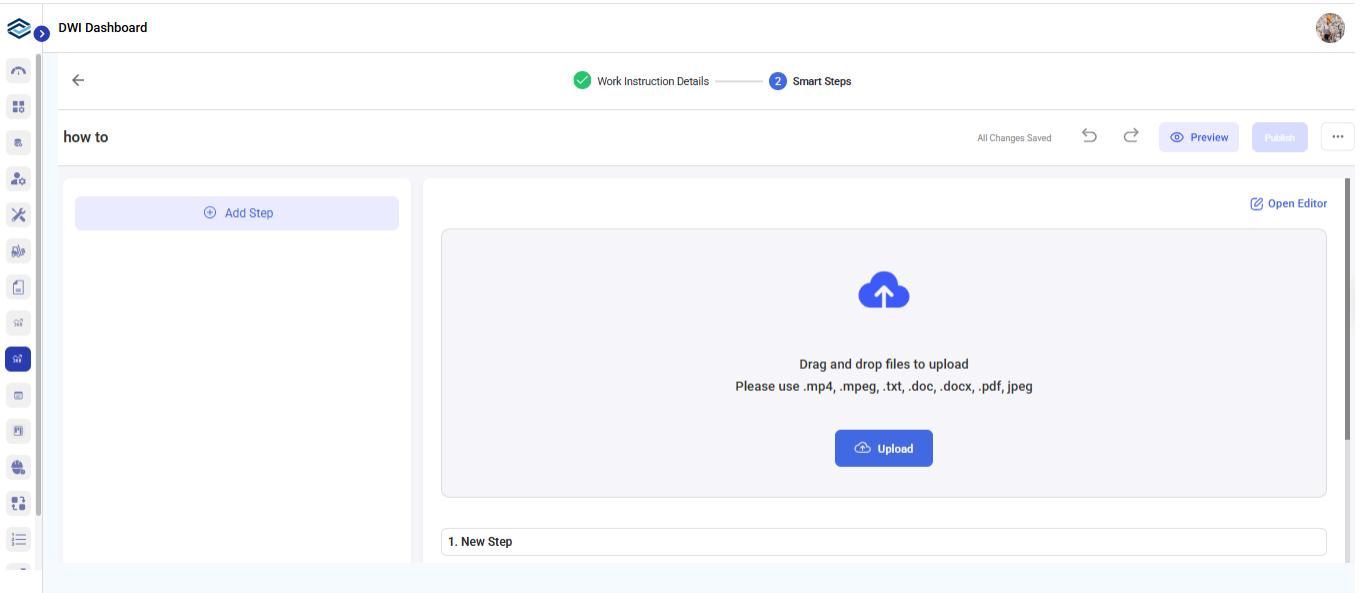
Add relevant details like Line Number, Department, or other context-specific information.

Label	Value
<input type="text" value="e.g., 'Line'"/>	<input type="text" value="e.g., 'SG04/SG05'"/>

6. Click **Proceed**.

7. Click **Upload** to add media like images, videos or documents. You can also navigate to **Open Editor** to open the Media Editor. You can trim, expand videos and annotate the images.

 **Note:**
Media Editor is only for videos and images, not for documents.



The screenshot shows the 'DWI Dashboard' interface. At the top, there's a navigation bar with 'Work Instruction Details' (checked) and 'Smart Steps' (active). Below this, the main content area is titled 'how to'. On the left, there's a sidebar with various icons. In the main area, there's a large light blue box with a cloud upload icon and the text: 'Drag and drop files to upload. Please use .mp4, .mpeg, .txt, .doc, .docx, .pdf, jpeg'. Below this box is an 'Upload' button. To the right of the main area, there's an 'Open Editor' link. At the bottom of the main area, there's a '1. New Step' input field. The top right of the interface has 'All Changes Saved', 'Preview', and 'Publish' buttons.

8. Click **Add Step** to begin writing.

9. Give a **Title** for the instruction and click on **Add Section** to add:

- **Instruction:** These are core procedural steps that describe **WHAT** to do and **HOW** to do it.
- Click on **Add Sew Section** to include **Hints** and **Warnings**, or **Custom Section**.
- **Warnings:** Highlight critical safety information, hazard alerts, and mandatory safety procedures that prevent injury, equipment damage, or process failures.

Example: "Closely monitor these steps to prevent overfilling the tanks"

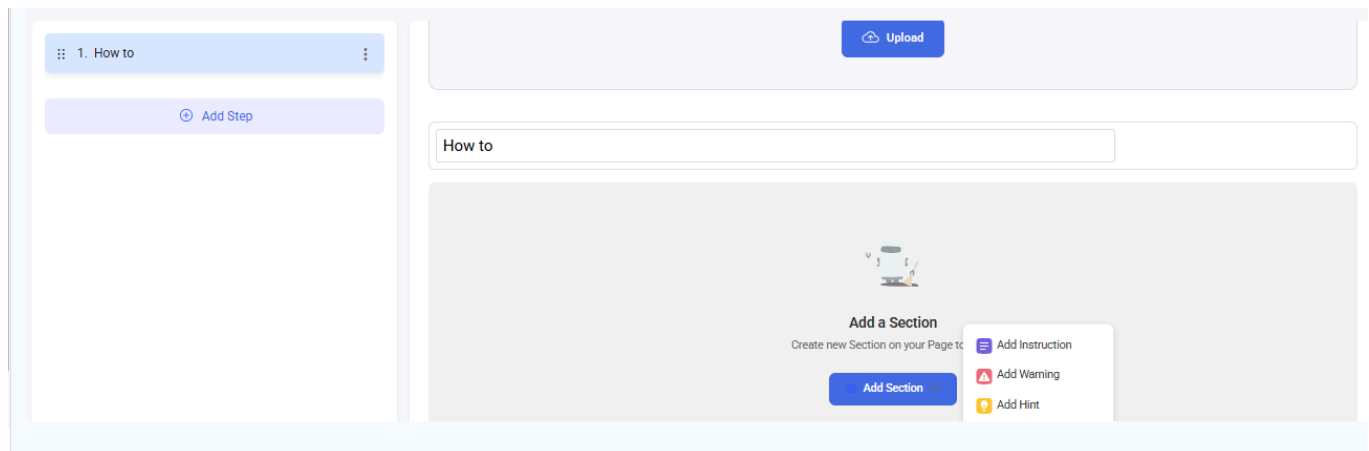
- **Hints:** Add helpful tips, best practices, troubleshooting guidance, and additional context that improves execution quality, efficiency, or success rate.

Example: "Use tie wire to tie the used rolls together and put on pallet to be redressed"

- **Custom Section:** Add context-specific content that doesn't fit standard categories but serves important purposes in industrial work instructions.

*Example: **VERIFICATION/TESTING** for **quality control checks** and **validating steps** or **TROUBLESHOOTING** for **problem diagnosis** and **solution steps**.*

You can drag and drop the sections to rearrange them.



10. Click **Preview** to check how the content appears across different formats, including mobile, tablet, and PDF.

11. Click **Publish**.

3. Integrate Work Instructions with Rounds

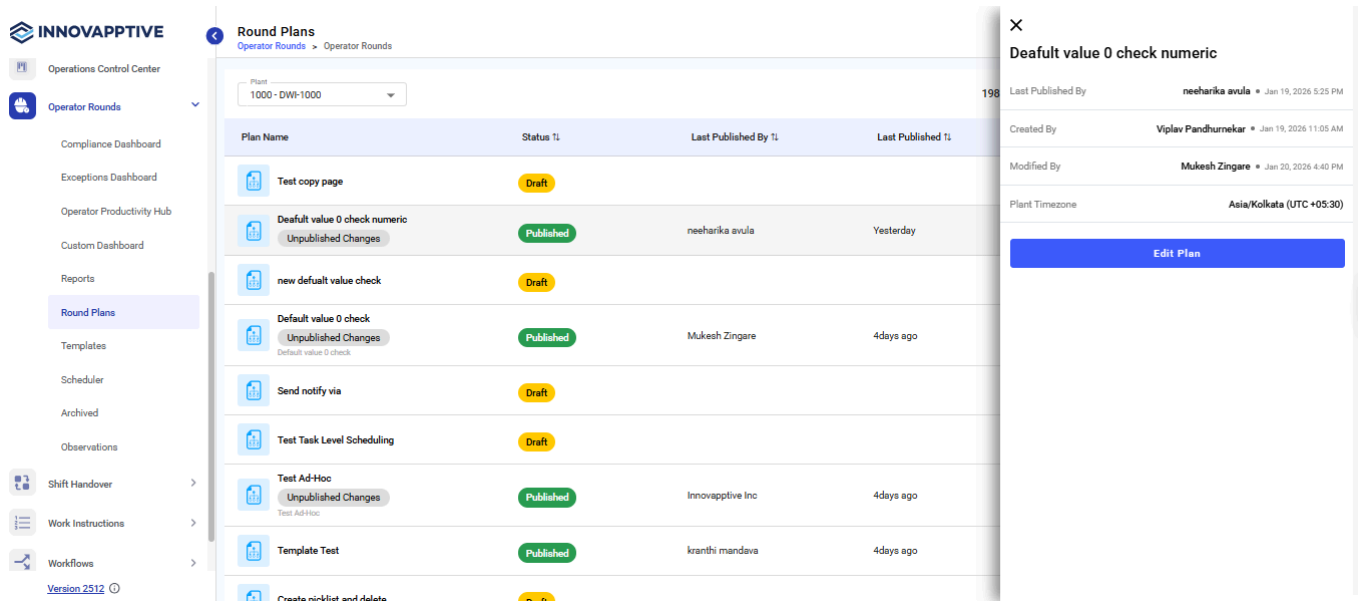
Connect work instructions to rounds to ensure operators have the right procedures immediately available. You can add work instructions at both the round and task levels.

3.1. Add Work Instructions at Round Level

Use this for one-time jobs, emergency repairs, or unique situations.

You can add work instructions while creating or editing rounds. To add work instructions at the round level for existing rounds:

1. Navigate to **Operator Rounds** → **Round Plans** from the left-side menu.
2. Select the specific round plan.
3. Click **Edit Plan**.



4. Click **Add** against **Work Instructions**.

| 3 - Integrate Work Instructions with Rounds

← Back to List

1 Plan Details — 2 Route and Tasks — 3 PDF Setup

Cancel Save & Next

Plant *

1000 - DWI-1000

Notes And Attachments

Add necessary information that users should know before starting their round.

Upto 250 Characters

Add Images or PDF upto 3.5 MB

Tags

Start typing to see tags

Enable Barcode Scanning

Scan asset and location barcodes during your inspection rounds

Work Instructions

Add general guidance or procedures for this round

Add

Additional Details

Add meta-data related to the Round or Asset

Add

5. Select the instruction from the list and click **Go Next**.

Select Work Instructions

Search by Name/Description

0 / 15 Work Instructions Selected

Cancel Go Next

6. Click **Save & Next**.

7. Click **Next**.

8. Click **Publish** to publish the round with work instructions.

3.2. Add Work Instructions at Task Level

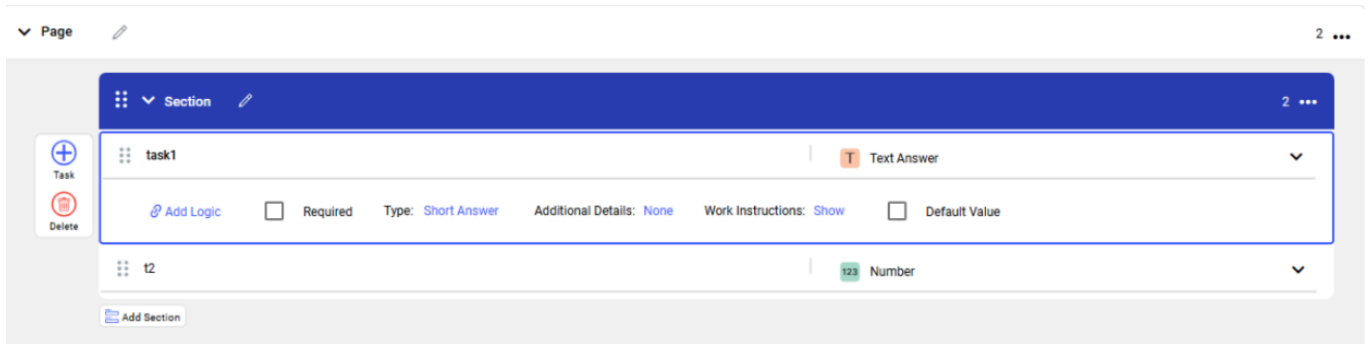
Use this for specific tasks in a round.

To add work instructions at task level:

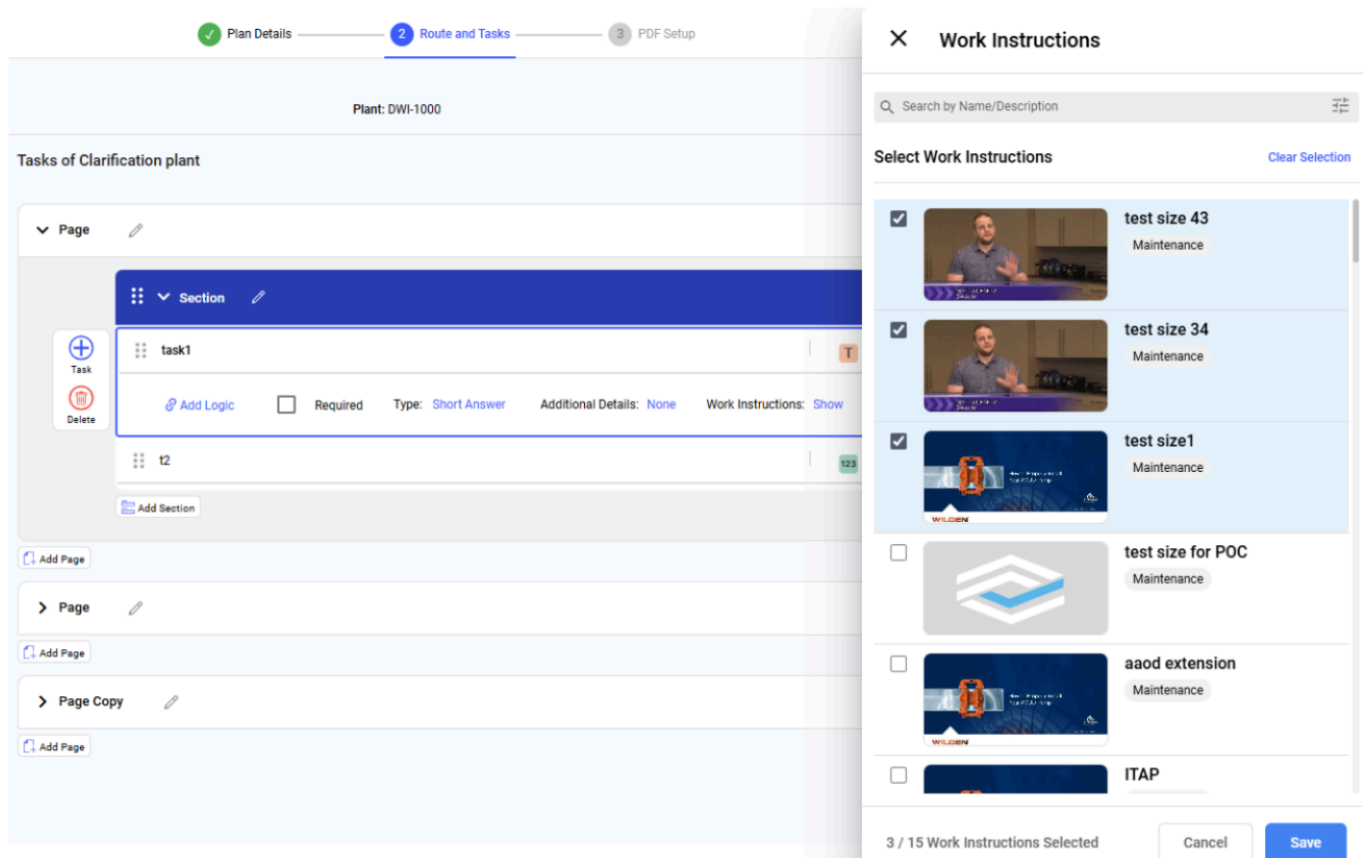
1. Navigate to **Operator Rounds** → **Round Plans** from the left-side menu.
2. Select the specific round plan.
3. Click **Edit Plan**.
4. In the **Round Details** screen, click **Save & Next**.
5. In the **Route and Tasks** screen,

| 3 – Integrate Work Instructions with Rounds

- a. Select the task.
- b. Click **Show** against the **Work Instructions** field.



- c. In the **Work Instructions** window, check the checkboxes to select the required instructions and click **Save**.



6. Click **Next**.
7. Click **Publish** to publish the round with work instructions.

3.3. Remove Linked Instructions

Remove an instruction if it was added by mistake or is no longer relevant:

To remove the linked instruction at both round and task levels:

1. Open the round plan.
2. In the Work Instructions section, click the X icon next to the instruction to remove it at round level.
3. Click **Save & Next**.
4. Select the task.
5. Click **Show** against the **Work Instructions** field.
6. Uncheck the checkboxes to remove the instructions at task level.
7. Save the round plan.

4. Update and Manage Work Instructions

Update work instructions to reflect equipment changes, safety improvements, or technician or operator feedback. Changes take effect immediately for all technicians. This section explains when updates are required and how to correctly modify existing instructions.

You can update instructions for:

- **Equipment Changes:** New models, updated maintenance procedures, or tool substitutions.
- **Safety Updates:** New mandates, hazard warnings, or PPE requirements.
- **Quality Improvements:** More efficient sequences or error-reduction techniques.
- **Technician or Operator Feedback:** Clarifying confusing steps or adding missing prerequisites.

Access Editing Mode

1. Open **Digital Work Instructions**.
2. Locate the instruction using **Search** or by browsing the list.
3. Click the instruction to open it.

Update Work Instruction Details

- **Overview:** Click in the fields to edit text or values. Ensure it clearly identifies the procedure.
- **Prerequisites (Tools & Safety):** Click in the fields to edit text or values.
- **Additional Details:**
 - Click in the fields to edit text or values.
 - Click Remove to delete the values.
- **Thumbnail:** Click the **Edit** icon to change the thumbnail.

Manage Steps

- **Edit Text:** Select a step on the left side and click the step on the right-side to update the text.
- **Add Step:** Click **Add Step** if you want a new step.
- **Delete Step:** Click More icon next to step and select **Delete**.
- **Duplicate Step:** Click More icon next to step and select Duplicate.
- **Reorder:** Click and hold the drag handle (::). Drag to the new position and release.

Manage Sections

- **Rename:** Click the section header and edit the name.



Note:

Note: You can edit only custom section names.

- **Add Section:** Click **Add New Section** > **Add Custom Section**, change the name, and add instructions into it.
- **Delete Section:** Hover the mouse on the More icon at the right-side of the section and click Delete icon at the left-side of the section.

Edit Images

- **Add:** Select the step, click **Upload** or **Add Image**, and select the image.
- **Add and Edit:** Select the step and click **Open Editor**.
 - In the **Media Editor** screen:
 - Click **Upload** and select the image.
 - Edit and enhance the image by cropping, resizing, rotating, highlighting important sections, and applying additional refinements as needed.
 - Click **Save**.
- **Delete:** Click the **X** icon to delete the image.

Do Final Checks

Before publishing, review the complete instruction end-to-end:

1. Read all steps in the new sequence.
2. Verify prerequisites match the new requirements.
3. Check that images and tips correspond to the correct steps.
4. Click **Publish** to publish the new version.

5. View and Restore Version History

You can view version history to review changes and restore a previous version when needed to ensure accuracy and continuity.

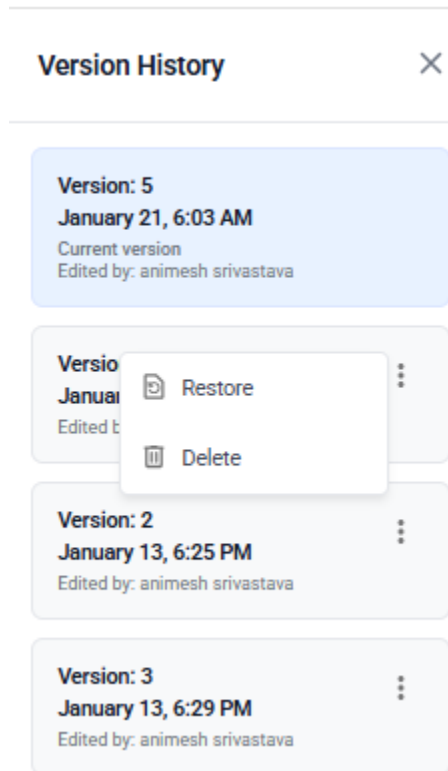
To view and restore version history:

1. Open the work instruction.
2. Click the **More** icon next to the Proceed button and select **Version History**.

The screenshot displays the 'Work Instruction Details' interface. At the top right, it shows 'All Changes Saved', a 'Proceed' button, and a three-dot menu icon. The main content area is divided into three panels: 'Overview', 'Uploaded Video', and 'Version History'. The 'Overview' panel contains fields for Title (test size 43), Description (Enter), Plant (1000 - Hamburg), Work Center (Select), Functional Location (Select), Asset Class (Select), Asset (Select Asset), and Category (Select Category). The 'Uploaded Video' panel shows a video player with a progress bar at 0:00 / 2:00. The 'Version History' panel on the right lists five versions. Version 5 is highlighted in blue and marked as the 'Current version', with a timestamp of January 21, 6:03 AM and edited by animesh srivastava. Versions 1, 2, and 3 are listed below it, each with a timestamp and the editor's name. Version 1 is dated January 13, 6:21 PM; Version 2 is dated January 13, 6:25 PM; and Version 3 is dated January 13, 6:29 PM. Each version entry has a vertical ellipsis icon to its right.

The current and previous versions are displayed on the right-side.

3. Click the More icon on the previous version and select **Restore** to restore the previous version.



Or

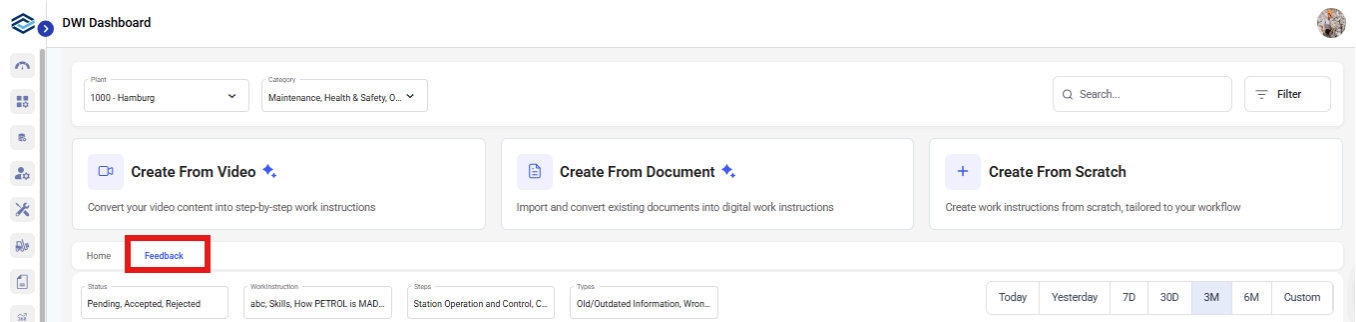
Select **Delete** to delete the previous version.

6. Review Instructions Feedback

Review feedback provided on work instructions to identify improvements and suggestions.

To review instructions feedback:

1. In the Work Instructions screen, click the **Feedback** tab.
You can view a complete list of feedback provided for the published instruction, and not the previous versions, if any.
Or
You can open the work instruction, click **Proceed**, click **More** and select **Feedback**.



- Or
- You can open the work instruction, click Proceed, click More and select Feedback.
2. Select feedback from the list to navigate to the corresponding instruction.
 3. Review the feedback and accept or reject it as needed.

7. Archive and Restore Instructions

Archive instructions that are no longer in use and restore them whenever they are needed again.

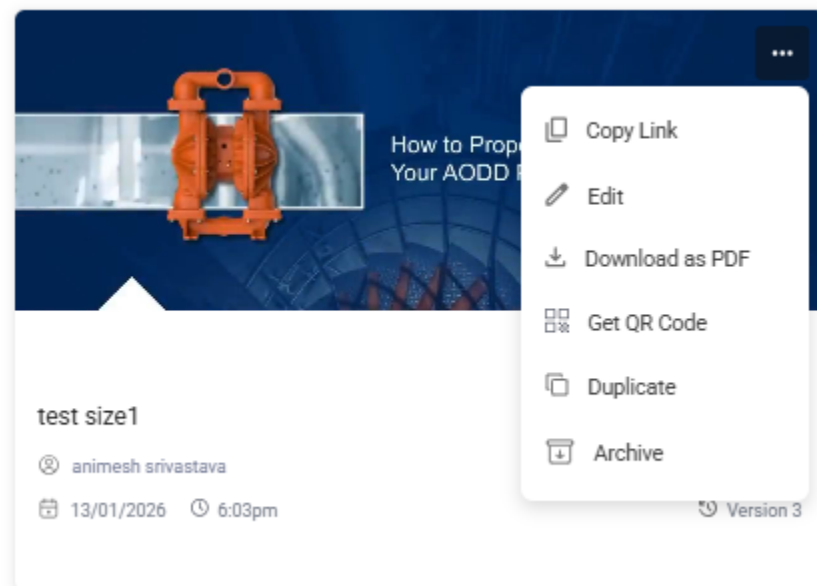
Archive Outdated Instructions

Remove instructions from active use but keep them for compliance records.

Use this when equipment is decommissioned, procedures are replaced, or jobs are no longer performed.

To archive instruction:

1. Under the **Published** tab, locate the instruction you want to archive.
2. Click the **More** icon on the instruction thumbnail and select **Archive**.



3. The instruction is removed from the **Published** list.

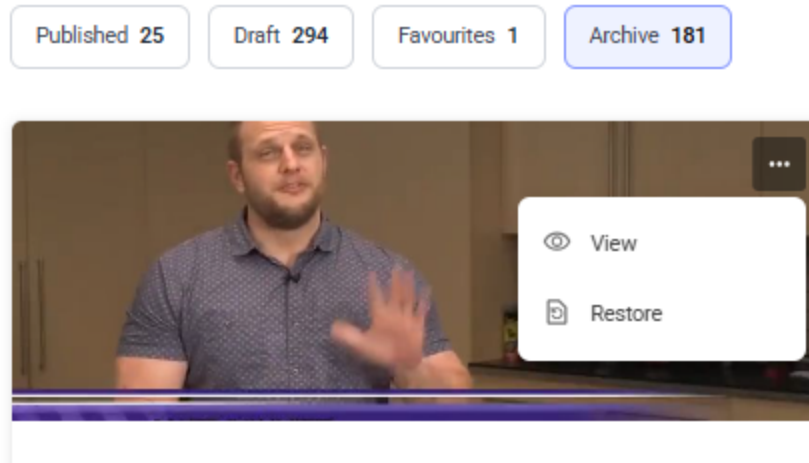
Restore Archived Instructions

Reactivate a previously archived procedure.

To restore archived instruction:

| 7 - Archive and Restore Instructions

1. Click the **Archive** tab.
2. Locate the instruction you want to restore.
3. Click the **More** icon on the thumbnail and select **Restore**.



4. The instruction returns to the respective list from where it was archived, i.e., **published**, **draft** or **favourites**.

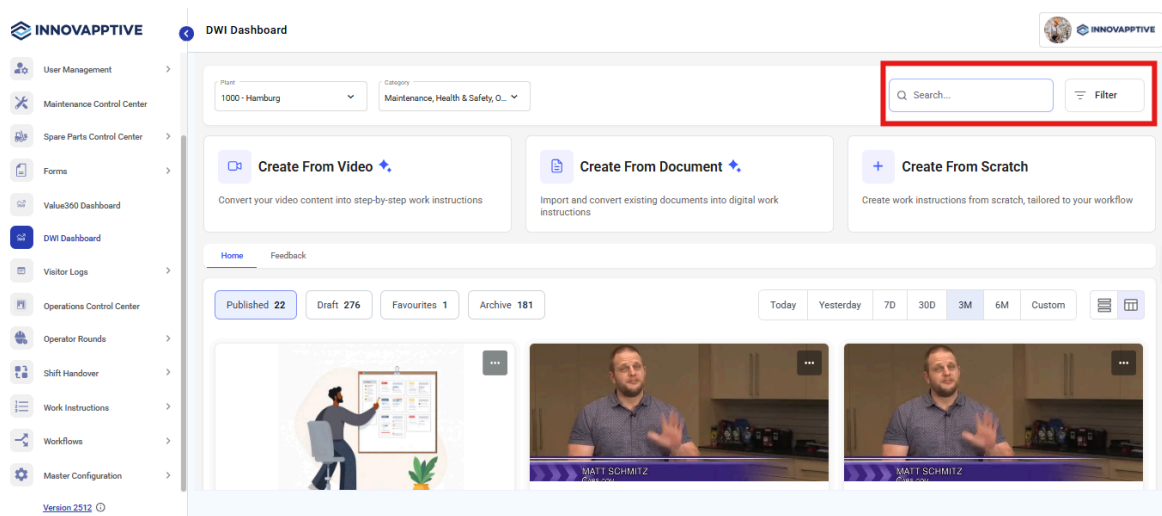
8. Search and Filter Work Instructions

Look up procedures to review before you start creating work instructions or to check details.

Search Work Instructions

To search work instructions:

1. Click **DWI Dashboard** on the left-side menu.
2. Enter the job name, task, or equipment (e.g., "pump replacement," "HVAC filter") in the **Search** bar.



3. Click the instruction from the results.

Filter Work Instructions

To filter work instructions:

| 8 – Search and Filter Work Instructions

1. Click **DWI Dashboard** on the left-side menu.
2. Click the Filter icon on top-right.

The screenshot displays the INNOVAPPTIVE DWI Dashboard interface. On the left is a vertical navigation menu with various system components. The main content area is titled 'DWI Dashboard' and includes a search bar and a filter icon, both highlighted with a red box. Below these are three 'Create From' options: Video, Document, and Scratch. A filter bar at the bottom shows 'Published 22' items and various time filters. Two video thumbnails are visible at the bottom of the dashboard.

3. Select **Location, Asset, Author, or Tags** values and click **Apply**.
The results are displayed based on the selected filter values.
4. Click the required instruction from the results.