

Digital Work Instructions User Guide for Supervisors

Connected Worker Solutions



Title and Copyright

Copyright and **Terms of Use** page for **Digital Work Instructions**.

User Guide for **Digital Work Instructions**, part of the iCWP platform.

Release Version: 2607

Release Date: 29 July 2026

Published Date: 29 July 2026

Document Version: 1.0

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Preface

Use this guide according to your role and understand the related products and document conventions.

Intended Audience

This guide is for supervisors, subject matter experts, and authorized Work Instruction authors who create, review, publish, assign, update, and govern Digital Work Instructions in iCWP Web for use in iMaintenance and mRounds.

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.

Application Integration

Digital Work Instructions are authored and managed in iCWP Web. Field users open and follow published instructions through iMaintenance mobile or mRounds mobile, according to where the work is executed.

Related Products & Solutions

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

Related documentation:

- iMaintenance User Guide for Technicians
- iMaintenance User Guide for Supervisors
- mRounds User Guide for Operators

- mRounds User Guide for Supervisors
- Digital Work Instructions User Guide for Technicians
- iCWP 2607 Release Notes

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1. Introduction to Work Instructions

Use this guide to create, publish, assign, maintain, and retire Work Instructions throughout their controlled lifecycle.

Work Instructions move from an approved source or new draft to published guidance used during iMaintenance or mRounds execution. The topics follow that lifecycle rather than the application menu.

Follow the supervisor journey

1. Review [the dashboard and instruction statuses \(on page 9\)](#) to decide whether to create, revise, distribute, or retire an instruction.
2. Choose a source and [create the instruction \(on page 10\)](#) from video, document, or scratch.
3. After publication, [assign the instruction \(on page 20\)](#) to the correct iMaintenance work order or operation, or to the correct mRounds round or task.
4. Use [field feedback \(on page 29\)](#) to identify corrections and publish a controlled update when needed.
5. Manage language, offline availability, archive status, search, and reuse as the instruction moves through its operational life.

1.1. About Work Instructions

Work Instructions enable supervisors and subject matter experts to create, publish, assign, and maintain standardized procedures.

Use Work Instructions to:

- Create instructions from video, document, or manual authoring.
- Build standardized procedures with prerequisites, warnings, steps, and supporting media.
- Assign instructions to iMaintenance work orders and operations or to mRounds rounds and tasks.
- Maintain version history and controlled updates.
- Review and act on technician and operator feedback.
- Archive or restore instructions as their operational status changes.

1.2. Compatible Devices and Applications

Digital Work Instructions are authored in iCWP Web and consumed through the iMaintenance and mRounds mobile applications.

Use the approved iCWP Web browser requirements when authoring Digital Work Instructions. For field use, the device must meet the requirements of the application through which the instruction is opened: the iMaintenance User Guide for Technicians for work orders and operations, or the mRounds User Guide for Operators for rounds and tasks.

1.3. Frequently Asked Questions

Review common questions about creating, linking, updating, publishing, and retiring Work Instructions.

1. What is the purpose of Work Instructions (DWI)?

Work Instructions helps supervisors create, manage, and distribute standardized procedures, ensuring operators follow consistent, safe, and approved work practices.

2. Can Work Instructions be linked to work orders and operations?

Yes. Instructions can be associated with an entire work orders or with individual operations within a work order.

3. Can I add images, videos, and safety information to instructions?

Yes. Work Instructions can include media, prerequisites, tools, PPE requirements, warnings, hints, and other supporting content.

4. How do I update an existing Work Instruction?

Open the instruction in edit mode and update its details, steps, media, prerequisites, or sections. After reviewing the changes, publish the new version.

5. What happens when an instruction is no longer needed?

You can archive the instruction to remove it from active use while retaining it for future reference or compliance purposes. Archived instructions can be restored later if needed.

2. Work Instructions Dashboard

Use the dashboard to find instructions, review their status, and choose whether to create, edit, share, duplicate, export, or archive them.

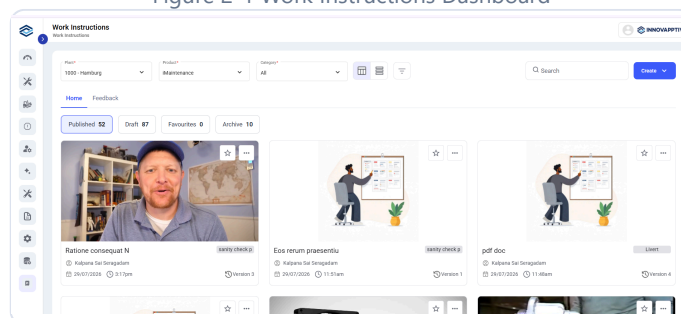
Use the status shown for each instruction to decide whether it is ready for use, requires editing, or should be removed from active use.

Need	Dashboard action
No instruction exists.	Create one from video, document, or scratch.
The procedure has changed.	Edit and publish a revised version.
Technicians reported a problem.	Review feedback before updating the affected content.
The instruction is no longer active.	Archive it while retaining its history.
Content must be distributed or reused.	Copy the link, download PDF, get a QR code, or duplicate the instruction.

Open the **More** menu (⋮) on an instruction to use the actions available for that record.

- **Copy Link:** Share direct access with an authorized user.
- **Edit:** Create a new draft or update the current instruction.
- **Download as PDF:** Get a controlled, printable reference.
- **Get QR Code:** Provide scan-based access to the instruction.
- **Duplicate:** Create a separate instruction based on the existing content.
- **Archive:** Remove the instruction from active use while retaining its history. See [Archive and Restore Instructions \(on page 38\)](#).

Figure 2-1 Work Instructions Dashboard



After choosing the required action, return to the dashboard to verify the instruction status and availability.

3. Create Work Instructions

Choose video, document, or scratch as the starting method, then complete the common authoring and publication steps.

All three methods create a draft and then converge on the same path: define details, add sections and media, preview, and publish.

Starting material	Use
A complete narrated recording of the task	Create from Video (on page 10)
An existing PDF or Word procedure	Create from Document (on page 12)
No approved source, or a short new task	Create from Scratch (on page 14)



CAUTION:

Video and document generation produce a draft. Generation does not validate technical accuracy, safety, sequence, tools, values, PPE, or plant requirements. Review and correct the draft before publishing.

After creating the draft, continue with [Define Instruction Details \(on page 17\)](#), [Add Sections and Media \(on page 18\)](#), and [Preview and Publish Work Instructions \(on page 19\)](#).

3.1. Create Work Instructions from a Video Recording

Use this method when you have a recording of the task. AI analyzes the video and narration to generate a draft for you to review.

Before you begin

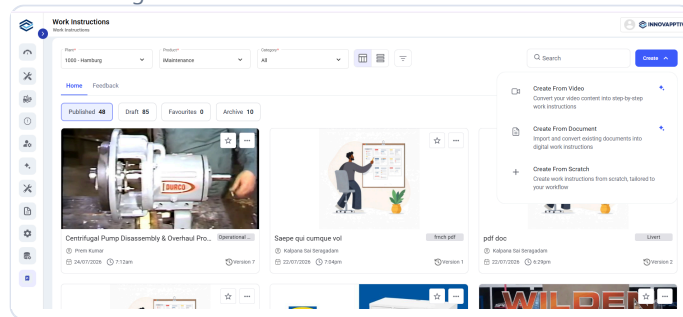
Before you upload, confirm:

- **Audio:** The person in the video narrates their actions clearly as they work, so the AI can transcribe the instructions.
- **Complete coverage:** The video captures the complete procedure from start to finish, without gaps.
- **Format:** The file is a standard video format (MP4, WebM, or MOV) under 500MB.
- The source video is approved for authoring use and does not contain sensitive or unsafe content.

To create Work Instructions from a video recording:

1. Navigate to the **Work Instructions** module and click **Create** in the top right corner.
2. Click **Create From Video** from the dropdown.

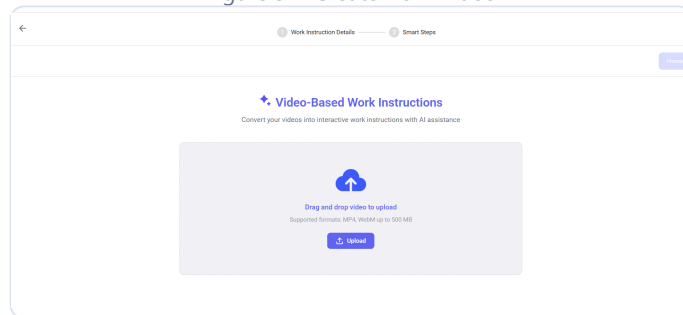
Figure 3-1 Create Work Instructions from Video



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

AI analyzes the video and generates a draft. Processing time depends on the video's size. If the video has no audio, the AI may miss context.

Figure 3-2 Create from Video



5. Complete the Overview, Prerequisites, and Additional Details fields.

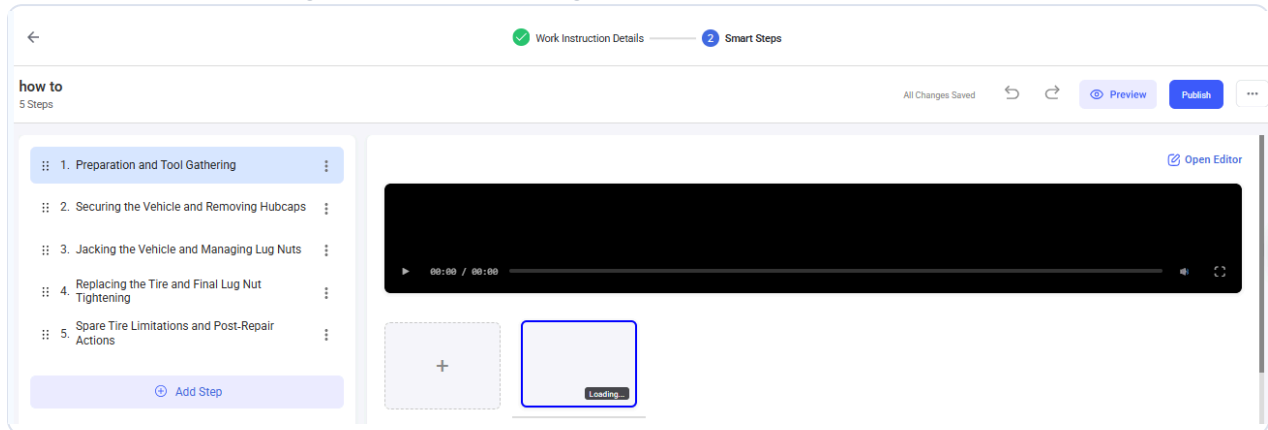
See [Define Instruction Details \(on page 17\)](#).

The screenshot shows the 'Work Instruction Details' form. The 'Overview' section is active, showing several input fields: 'Title' (with a plus icon), 'Description' (with a plus icon), 'Product' (with a dropdown menu), 'Plant' (with a dropdown menu), 'Work Center' (with a dropdown menu), 'Functional Location' (with a dropdown menu), and 'Asset Class' (with a dropdown menu). There is also a 'Thumbnail' section on the right side of the form, which contains a placeholder image and an 'Upload' button. At the top right of the form, there is a 'Proceed' button and a 'All Changes Saved' indicator.

6. Click **Proceed** to generate step-by-step instructions from the video's audio.
- Review the generated steps for accuracy before continuing.

7. Click a generated step to edit its **Instructions** text.

Reword vague descriptions and fix transcription errors. If a step contains multiple actions, click **Add Step** to split it — for example, split "Remove bolts on top and bottom of rolls, using punch, push up to remove shafts" into separate steps for removing the bolts and removing the shafts.



8. Add hints, warnings, or custom sections, and add or edit media, as needed.

See [Add Sections and Media \(on page 18\)](#).

9. Preview and publish the instruction.

See [Preview and Publish \(on page 19\)](#).

Result

An AI-generated draft is created from the video and is ready for subject-matter review.

Next action

Next: [verify and complete the shared instruction details. \(on page 17\)](#)

3.2. Create Work Instructions from a Document

Use this method when you have an existing procedure document. AI converts it into structured, step-by-step instructions for you to review.

Before you begin

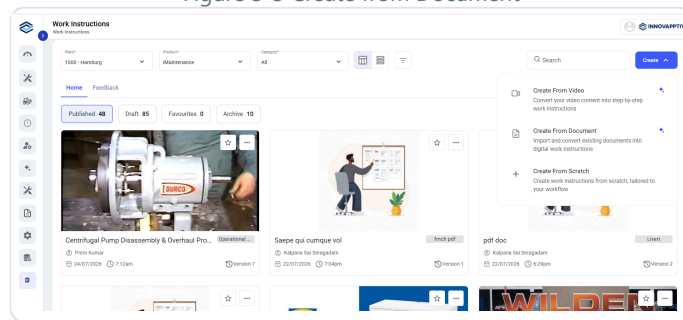
Before you upload, confirm:

- **Format:** The source document is PDF, .doc, or .docx.
- **Clear structure:** Documents with numbered steps, bullet points, or clear headings are easier for the AI to process accurately.
- The document is current and approved, with superseded revision pages removed.

To create Work Instructions from a document:

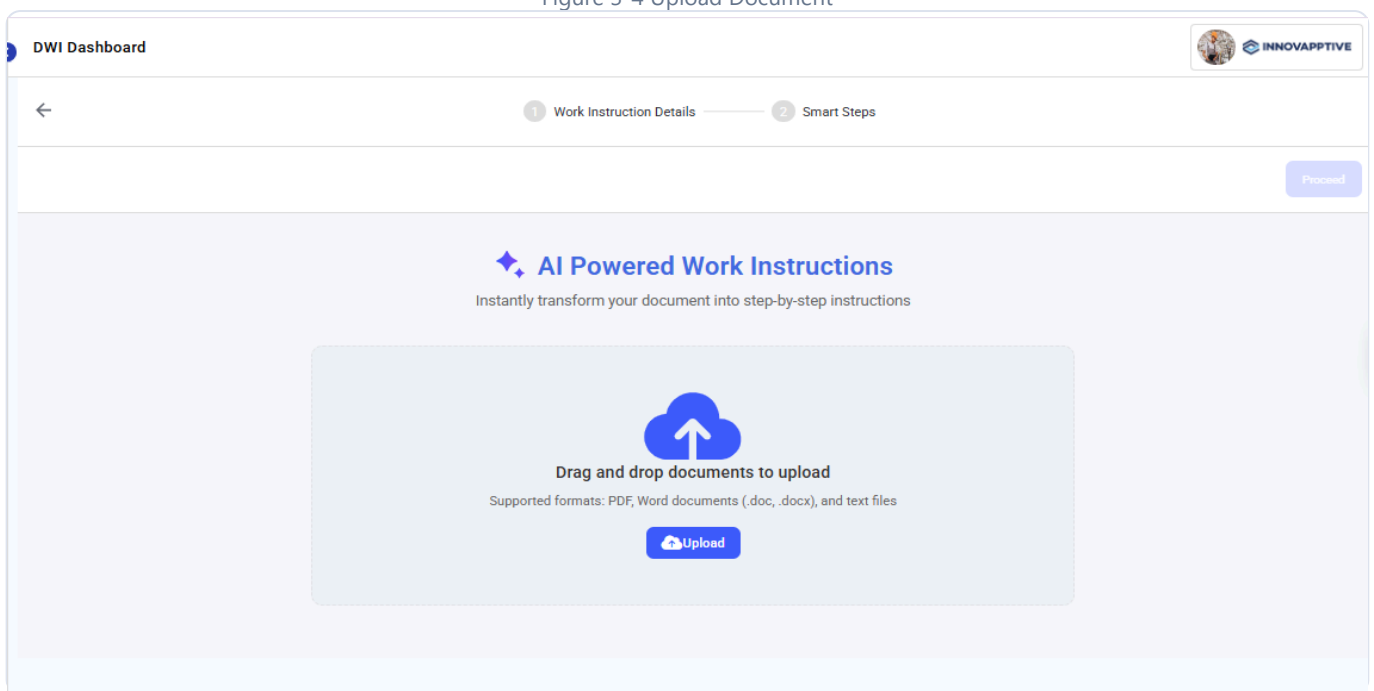
1. Navigate to the **Work Instructions** module and click **Create** in the top right corner.
2. Click **Create From Document** from the dropdown.

Figure 3-3 Create from Document



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

Figure 3-4 Upload Document

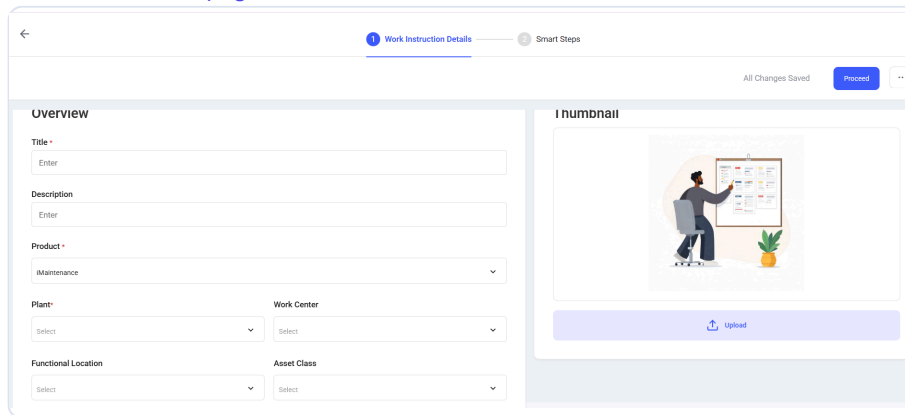


4. Click **Proceed**.

AI analyzes the document and generates a draft. Processing time depends on the document's size.

5. Complete the Overview, Prerequisites, and Additional Details fields.

See [Define Instruction Details \(on page 17\)](#).



6. Click **Proceed** to generate step-by-step instructions from the document.

7. Click a generated step to edit its **Instructions** text.

Verify no steps, warnings, tables, or units were omitted. Remove any headers, footers, legal text, or revision tables that were incorrectly generated as steps. If a step contains multiple actions, click **Add Step** to split it.

8. Add hints, warnings, or custom sections, and add or edit media, as needed.

See [Add Sections and Media \(on page 18\)](#).

9. Preview and publish the instruction.

See [Preview and Publish \(on page 19\)](#).

Result

An AI-generated draft is created from the document and is ready for comparison with the approved source.

Next action

Next: verify and complete the shared instruction details. [\(on page 17\)](#)

3.3. Create Work Instructions from Scratch

Build a Work Instruction step-by-step when no video or document source is available, or when you need full control over wording and sequence.

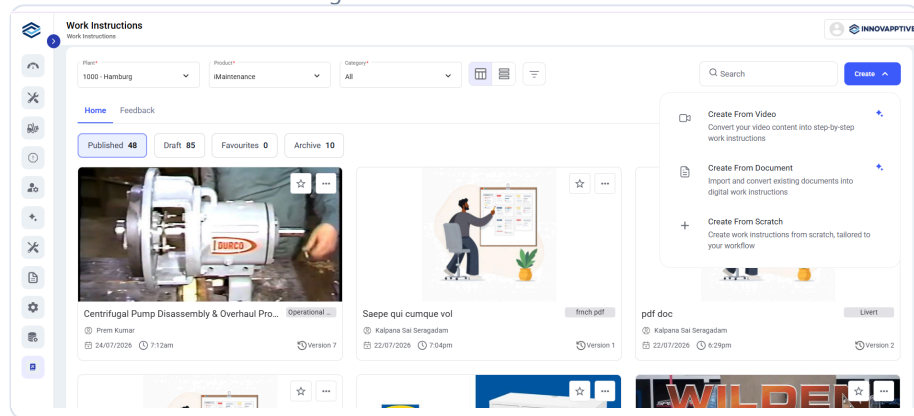
Use this method when:

- You have no existing video or document to import.
- You need to phrase specific technical steps with precise control.
- The procedure is short, and writing it is faster than recording a video.

To create Work Instructions from scratch:

1. Navigate to the **Work Instructions** module and click **Create** in the top right corner.
2. Click **Create From Scratch** from the dropdown.

Figure 3-5 Create from Scratch



3. Complete the Overview, Prerequisites, and Additional Details fields.

See [Define Instruction Details \(on page 17\)](#).

The screenshot shows the 'Work Instruction Details' form. The 'Overview' tab is active, displaying fields for Title, Description, Product (Maintenance), Plant (Select), Work Center (Select), Functional Location (Select), and Asset Class (Select). A 'Thumbnail' section on the right shows a placeholder image with an 'Upload' button. A 'Process' button is at the top right of the form.

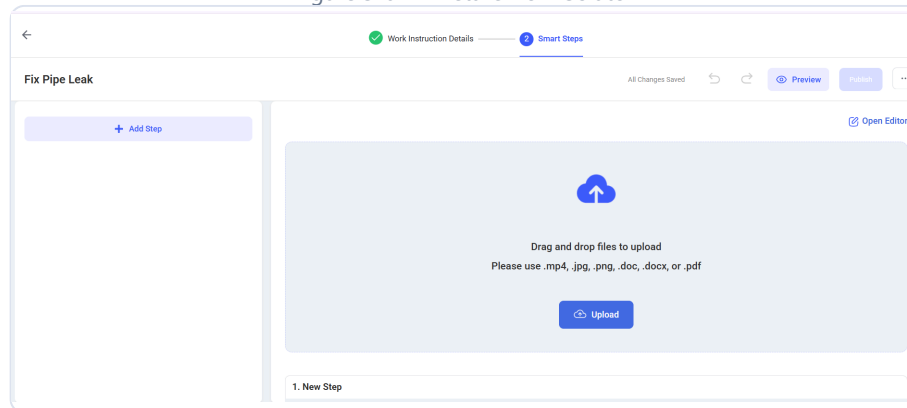
4. Click **Proceed**.

- Click **Upload** to add media, or click **Open Editor** to trim, expand, or annotate images and videos.

**Note:**

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

Figure 3-6 Fill Details from Scratch

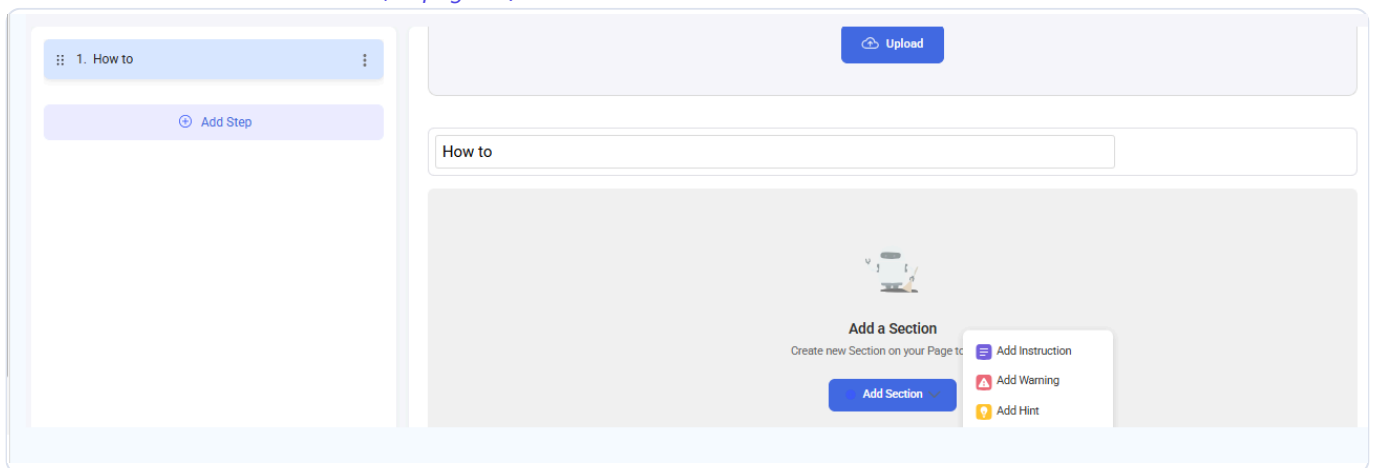


- Click **Add Step** to begin writing, then give the instruction a **Title**.

The instruction text describes **what** to do and **how** to do it.

- Add hints, warnings, or custom sections, as needed.

See [Add Sections and Media \(on page 18\)](#).



- Preview and publish the instruction.

See [Preview and Publish \(on page 19\)](#).

Result

A new instruction draft is ready for detailed review, preview, and publication.

Next action

Next: verify and complete the shared instruction details. *(on page 17)*

3.4. Define Instruction Details

Set the Overview, Prerequisites, and Additional Details fields for a Work Instruction, regardless of which creation method you used.

Overview:

- Provide a relevant **Title** (for example, "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 **Product, Plant, Unit/Work Center, Location/Functional Location, Asset Class, Asset, Category, Task List**, and **Tags**.

**Note:**

When a supervisor or senior technician adds an operation, the associated Work Instructions are automatically added along with the task list/operation. See [Auto Assign Work Instructions with AI](#) *(on page 20)*.

Prerequisites:

List all required **Tools** (for example, "Torque wrench, 10-150 ft-lbs") and **Safety & PPEs** (for example, "Cut-resistant gloves"), including any that weren't explicitly captured by the source video or document.

Additional Details:

Add relevant details in the **Label** and **Value** fields, such as **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.

Label

e.g., "Line"

Value

e.g., "SG04/SG05"

×

Next: [refine the steps and add the required sections and media. \(on page 18\)](#)

3.5. Add Sections and Media

Add hints, warnings, and custom sections to a Work Instruction step.

Click **Add New Section** to add **Hints**, **Warnings**, or a **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 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 an important purpose. *Example: VERIFICATION/TESTING for quality control checks and validating steps, or TROUBLESHOOTING for problem diagnosis and solution steps.* You can drag and drop sections to rearrange them.

Instructions

1) Verify that the spare tire is in good condition and properly inflated.

2) Confirm that the jack and lug wrench are the correct size for the vehicle's lug nuts.

Warning

1) Do not attempt to change a tire without the proper jack and lug wrench, as this may cause injury or damage.

Hints

1) Keep the tools organized in an easily accessible location to reduce response time during an emergency.

Add media: Click **Upload** to add images, videos, or documents. Click **Open Editor** to open the Media Editor and trim or expand videos, and crop, resize, rotate, or annotate images.

**Note:**

The Media Editor supports videos and images only, not documents.

Next: [preview and publish the instruction. \(on page 19\)](#)

3.6. Preview and Publish

Before making an instruction available, preview its mobile, tablet, and PDF output, then publish the reviewed version.

After defining instruction details and steps, regardless of which creation method you used:

1. Click **Preview** to check how the content appears on mobile, tablet, and PDF.
2. Click **Publish**.

Result

The instruction is live and available to authorized users. If created from a video recording, the published instruction retains the embedded video timestamps for future reference.

Next action

Next: [Assign the published instruction to the correct iMaintenance or mRounds work context. \(on page 20\)](#)

4. Assign Work Instructions

Connect a published Work Instruction to the iMaintenance or mRounds work context where the field user needs it.

Choose the assignment route based on where the work is executed:

- [iMaintenance \(on page 20\)](#): assign automatically through mapping rules, or link the instruction manually at work-order or operation level.
- [mRounds \(on page 24\)](#): link the instruction at round-plan or task level.

Use the broader level only when the same guidance applies to all work below it. Use the more specific level when the instruction applies only to one operation or task.

4.1. Assign Work Instructions in iMaintenance

Make a published instruction available from an iMaintenance work order or operation.

Choose one of these assignment methods:

- [Assign automatically \(on page 20\)](#) when configured mapping rules can identify the correct instruction.
- [Assign at work-order level \(on page 21\)](#) when the instruction applies to the complete job or multiple operations.
- [Assign at operation level \(on page 22\)](#) when the instruction applies only to one operation.

After assignment, verify that the intended technician can open the published instruction from the selected work context.

4.1.1. Auto Assign Work Instructions with AI

Work Instructions can be automatically added to a Work Order based on configured mapping rules.

When a Work Order is created, Work Instructions can be automatically populated based on the Functional Location and Asset, reducing the need for supervisors to manually select them.

Whenever key fields change (Work Order Type, Asset, Functional Location, Maintenance Plan, Task List, or Operations), the system automatically updates the Work Instructions.

**Note:**

- Selecting an Asset or Functional Location alone does not trigger Work Instructions.
- Work Order Type must also be set to trigger auto-population.
- Asset-level mapping takes priority over Functional Location-level mapping.

Next: Verify the published instruction is available from the intended work context, then return to the dashboard. (on page 9)

4.1.2. Add Work Instructions at Work Order Level

Add a Work Instruction at work-order level when the procedure applies to the complete job or multiple operations.

To add work instructions at the work order level for existing work orders:

1. Navigate to the Work Order module in the mobile app.
2. Go to the desired Work Order.
3. Tap on the **More** option (:) and choose **Edit Work Order**.
4. Scroll down to the **Work Instruction** section and tap the **Add** button.
The Work Instruction Library opens.
5. Select the required Work Instruction and tap on **Add**.
6. Tap on **Update** to save.

Result

The published Work Instruction is linked to the selected iMaintenance work order.

Next action

Next: Verify the published instruction is available from the intended work context, then return to the dashboard. (on page 9)

4.1.3. Add Work Instructions at Operation Level

Add a Work Instruction at operation level when the procedure applies only to that operation.

To add work instructions at the **Operation** level:

1. Navigate to the **Work Order** module in the mobile app.
2. Go to the desired Work Order.
3. Tap on the **More** option and choose **Edit Work Order**.
4. Scroll down to **Operations** and tap the desired operation.
5. Tap on **Add Work Instruction**.
The Work Instructions Library opens.
6. Select the required Work Instructions and tap on **Add**.
7. Tap on **Update** to save.

Result

The published Work Instruction is linked to the selected iMaintenance operation.

Next action

Next: Verify the published instruction is available from the intended work context, then return to the dashboard. (on page 9)

4.1.4. Remove Linked Instructions

Remove a manually linked Work Instruction when it is incorrect or no longer applies to the iMaintenance work order or operation.

Choose the level from which the instruction must be removed:

- [Remove Linked Instructions at Work Order Level \(on page 23\)](#)
- [Remove Linked Instructions at Operation Level \(on page 23\)](#)

Removing the link does not delete the Work Instruction from the library.

4.1.4.1. Remove Linked Instructions at Work Order Level

Remove a work-order-level instruction when it should no longer be available for the complete job.

To remove the linked instruction at the work order level:

1. Navigate to the **Work Order** module in the mobile app.
2. Go to the desired Work Order.
3. Tap on the **More** option and choose **Edit Work Order**.
4. Scroll down to the Work Instruction section and tap on the **More** icon.
5. Tap **Delete**.



Note:

This removes the link between the instruction and this work order. The instruction itself is not deleted and remains available in the Work Instructions library.

6. Tap **Update** to save and apply the changes.

Result

The instruction is unlinked from this work order and no longer appears under its Work Instructions section.

Next action

Next: Return to the work order or operation, verify only the correct instructions remain, then return to the dashboard. (on page 9)

4.1.4.2. Remove Linked Instructions at Operation Level

Remove an operation-level instruction when it should no longer be available for that operation.

To remove the linked instruction at the operation level:

1. Navigate to the **Work Order** module in the mobile app.
2. Go to the desired Work Order.
3. Tap on the **More** option and choose Edit Work Order.
4. Scroll down to **Operations** and tap the desired operation.
5. Select **Edit**.
6. Scroll down to the Work Instruction section and tap on the **More** icon against the Work Instruction.
7. Tap **Delete**.



Note:

This removes the link between the instruction and this operation. The instruction itself is not deleted and remains available in the Work Instructions library.

8. Tap **Save**, then **Update** to apply the changes.

Result

The instruction is unlinked from this operation and no longer appears under its Work Instructions section.

Next action

Next: Return to the work order or operation, verify only the correct instructions remain, then return to the dashboard. (on page 9)

4.2. Assign Work Instructions in mRounds

Make a published instruction available to operators from a complete round or from one specific task.

Choose the assignment level that matches the scope of the guidance:

- **Round level** (on page 25): use when the instruction applies to the complete round or several tasks in the round.
- **Task level** (on page 26): use when the instruction applies only to one task.

After publishing the round plan, confirm that the instruction appears at the intended level during round execution.

4.2.1. Add Work Instructions at Round Level

Link a published Work Instruction to a round plan when the guidance applies to the complete round or several tasks.

You can add the instruction while creating or editing a round plan. The following steps use an existing round plan.

1. Navigate to **Operator Rounds** → **Round Plans** from the left navigation.
2. Select the required round plan.
3. Click **Edit Plan**.

The screenshot shows the INNOVAPPTIVE interface. On the left is a navigation menu with options like Operations Control Center, Operator Rounds, Compliance Dashboard, etc. The main area is titled 'Round Plans' and shows a table of plans for 'Plant 1000 - DWI-1000'. The table has columns for Plan Name, Status, Last Published By, and Last Published. One plan, 'Deafult value 0 check numeric', is highlighted. To the right, a modal window titled 'Deafult value 0 check numeric' is open, showing details like 'Last Published By: neeharika avula', 'Created By: Viplev Pandhurnekar', and 'Modified By: Mukesh Zingare'. An 'Edit Plan' button is visible at the bottom of the modal.

Plan Name	Status	Last Published By	Last Published
Test copy page	Draft		
Deafult value 0 check numeric	Published	neeharika avula	Yesterday
new default value check	Draft		
Default value 0 check	Published	Mukesh Zingare	4days ago
Send notify via	Draft		
Test Task Level Scheduling	Draft		
Test Ad-Hoc	Published	Innovapptive Inc	4days ago
Template Test	Published	kranthi mandava	4days ago

4. Click **Add** next to **Work Instructions**.

The screenshot shows the 'Plan Details' form. It includes a 'Plant' dropdown set to '1000 - DWI-1000', a 'Notes And Attachments' section with a text area and a file upload button, a 'Tags' section, and a 'Work Instructions' section. The 'Work Instructions' section has a text area and an 'Add' button, which is highlighted with a red box. Below this is an 'Additional Details' section with an 'Add' button.

5. Select the required instruction 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 plan with the linked instruction.

Result

The Work Instruction is linked at round level and becomes available from the round after the published plan is assigned.

Next action

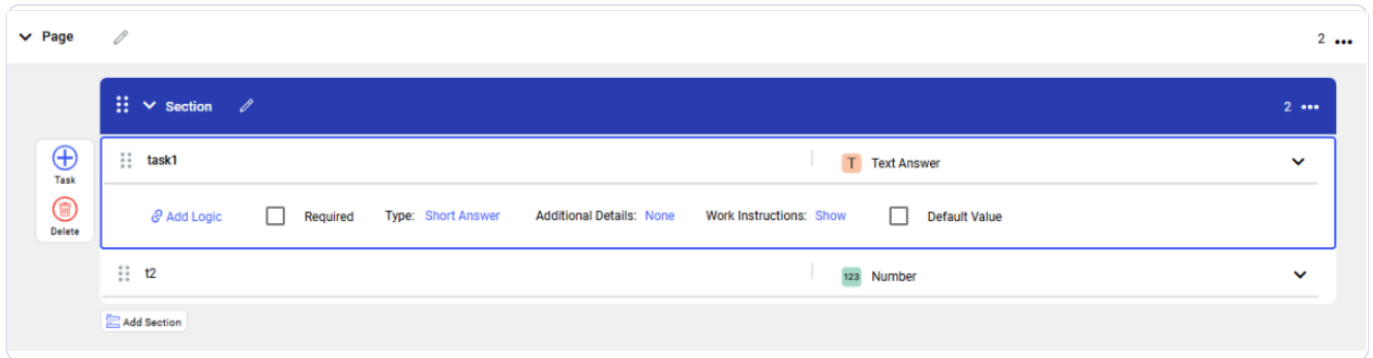
Next: Verify the instruction from an assigned round before relying on it for field execution.

4.2.2. Add Work Instructions at Task Level in mRounds

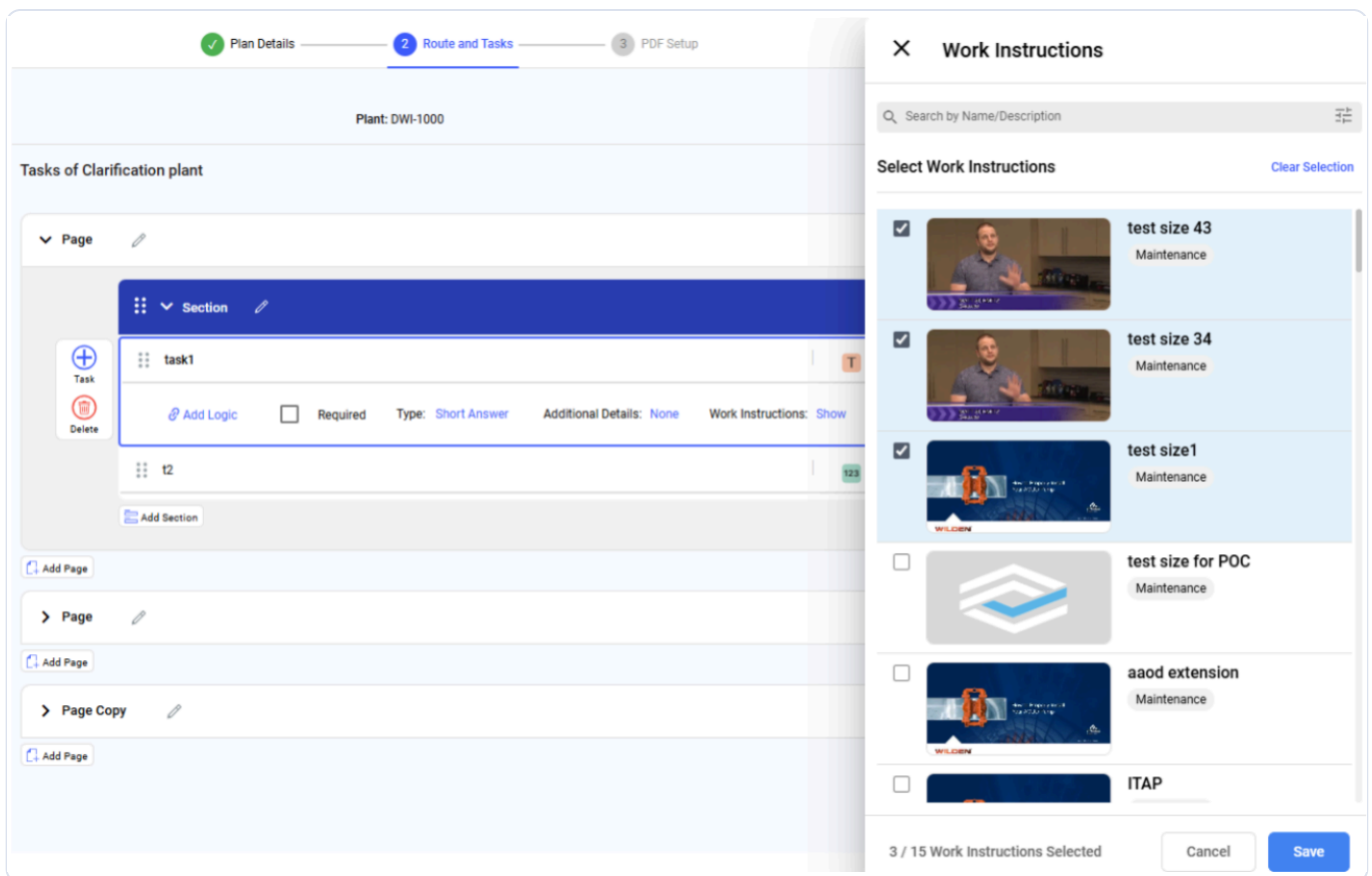
Link a published Work Instruction to one round task when the guidance does not apply to the complete round.

The following steps add an instruction to a task in an existing round plan.

1. Navigate to **Operator Rounds** → **Round Plans** from the left navigation.
2. Select the required round plan.
3. Click **Edit Plan**.
4. On the **Round Details** screen, click **Save & Next**.
5. On the **Route and Tasks** screen, select the required task.
6. Click **Show** next to **Work Instructions**.



7. In the **Work Instructions** window, select the required instructions and click **Save**.



8. Click **Next**.
9. Click **Publish** to publish the round plan with the task-level instruction.

Result

The Work Instruction is linked only to the selected task and becomes available when an operator opens that task.

Next action

Next: Verify the instruction from the selected task in an assigned round.

5. Review Instructions Feedback

Review technician and operator feedback to decide whether a published instruction needs clarification or correction.

Feedback can include text and attachments such as images, videos, or documents for better clarity. To review instructions feedback:

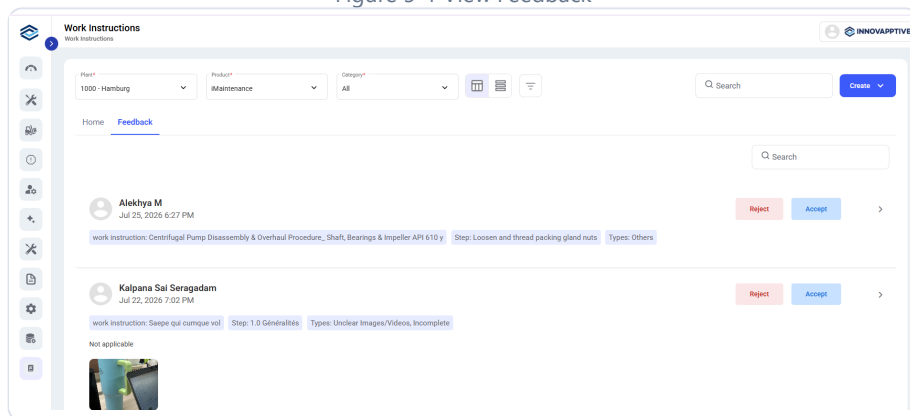
1. In the Work Instructions screen, click the **Feedback** tab.

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**.

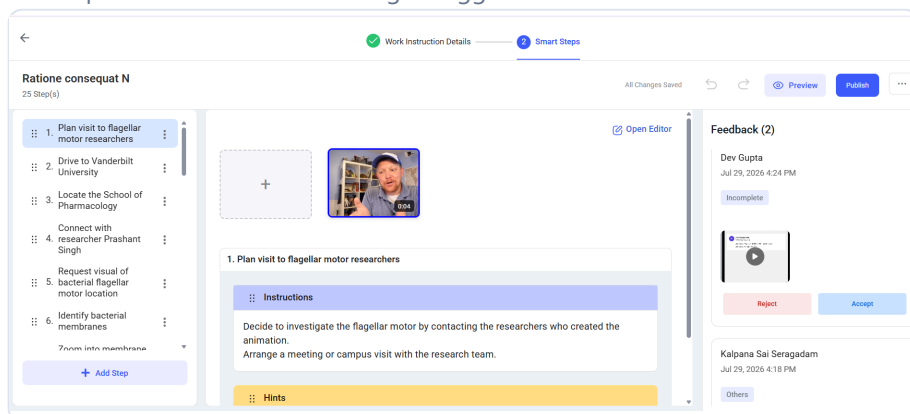
Figure 5-1 View Feedback



2. Select feedback from the list to navigate to the corresponding instruction.

3. Review the feedback and **Accept** or **Reject** it as needed.

You can modify the steps there to reflect the changes suggested in the feedback.



Warning:

When feedback identifies a potentially unsafe instruction, follow your organization's immediate suspension or escalation process. Do not wait for a normal content-update cycle.

Result

The feedback is accepted for revision, rejected with a reason, or escalated for urgent safety review.

Next action

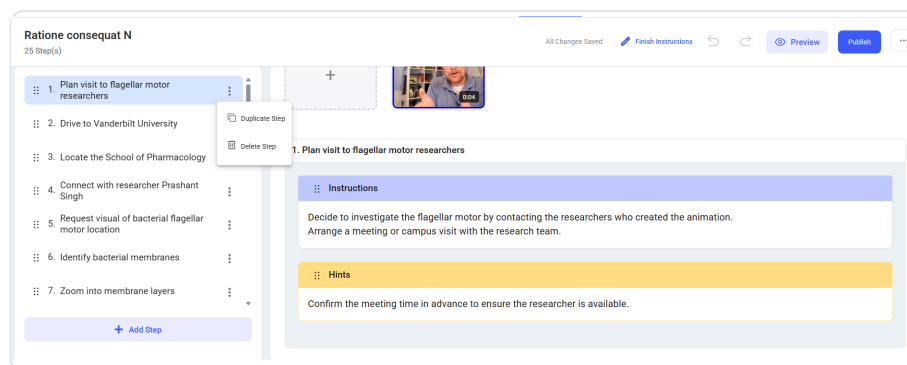
Next: Return to the Work Instructions Dashboard to verify status and availability. *(on page 9)*

6. Update and Manage Work Instructions

Revise an instruction when equipment, safety requirements, procedures, or field feedback changes, then publish the controlled update.

Update an instruction when equipment changes, safety requirements change, the procedure can be improved, or technician and operator feedback identifies a gap.

1. Open **Digital Work Instructions** and locate the instruction using Search or the dashboard lists.
2. Open the instruction in editing mode.
3. Update the instruction details that changed.
 - **Overview:** Update the title, description, and identifying information.
 - **Prerequisites:** Update tools, safety requirements, skills, and other preparation information.
 - **Additional Details:** Edit or remove values that no longer apply.
 - **Thumbnail:** Use the Edit action to replace the thumbnail.
4. Update the steps and their order.
 - Edit the text of an existing step.
 - Use **Add Step** to add a new step.
 - Use the More menu to delete or duplicate a step.
 - Drag a step to its new position to reorder it.



5. Update sections when the structure of the procedure changed.
 - Edit the name of a custom section.
 - Use **Add New Section** → **Add Custom Section** to add a section.
 - Use the section More menu to delete a section that is no longer required.



Note:

Only custom section names can be edited.

6. Update images and other media where required.

- Upload or add media to the selected step.
- Use the media editor to crop, resize, rotate, or highlight an image, and then save it.
- Remove media that no longer matches the step.

7. Review the complete instruction from beginning to end.

Verify the sequence, prerequisites, warnings, media, and values against the approved procedure and current equipment.

8. Click **Publish** to publish the revised version.

Result

The revised instruction is published as a new version. Field users receive the new version after the applicable refresh or synchronization.

Next action

Next: [Verify the new version and availability on the Work Instructions dashboard. \(on page 9\)](#)

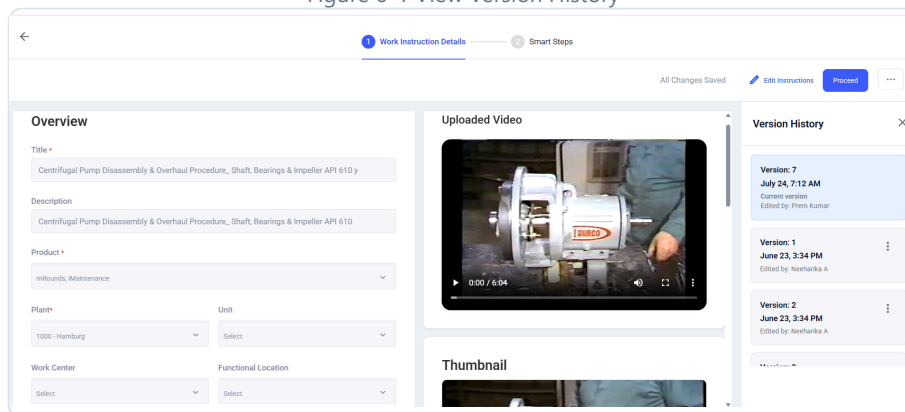
6.1. View and Restore Version History

Review previous published versions and restore an earlier version when the current instruction must be replaced.

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**.

Figure 6-1 View Version History



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.

Version History



Version: 7
July 24, 7:12 AM
Current version
Edited by: Prem Kumar

Version: 1
June 23, 3:34 PM
Edited by: Neeharika A


Version: 2
June 23, 3:34 PM
Edited by: Neeharika A


Version: 3

Or

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



Warning:

Deleting a previous version is permanent and cannot be undone.

Result

The selected previous content is restored according to the versioning rules and remains traceable in history.

Next action

Next: [Return to the Work Instructions Dashboard to verify status and availability. \(on page 9\)](#)

7. View Work Instructions in the Preferred Language

Work Instructions are displayed in the language selected in your profile settings, provided they are available in that language.

To support multiple languages, create and maintain a separate Work Instruction for each language, including language-specific text and media. Each Work Instruction is assigned a language when it is created based on the field user's configured language, and it retains that language even if the field user's default language changes later.



Note:

Work Instruction content and media are not translated automatically.

Next: [Return to the Work Instructions Dashboard to verify status and availability. \(on page 9\)](#)

8. Control Offline Availability

Understand how plant and user permissions affect Work Instruction downloads.

Offline download availability is controlled by an administrator through DWI configuration and user permissions.

When downloads are disabled:

- The Download action is hidden.
- The Downloaded tab appears only when downloaded content exists.
- Previously downloaded content can still be removed from the device.

Authors and supervisors should confirm offline requirements before publishing or assigning work in low-connectivity areas. See the DWI configuration documentation for the administrative procedure.

Next: [Return to the Work Instructions Dashboard to verify status and availability. \(on page 9\)](#)

9. Archive and Restore Instructions

Remove an instruction from active use without deleting its history, and restore it when the procedure becomes applicable again.

Archive an instruction when it should no longer be available for current work but must remain traceable. Restore it only after confirming that the procedure is still valid for use.

Choose Archive Outdated Instructions to remove active availability. Choose Restore Archived Instructions to return the record to its previous list, then verify its status on the Work Instructions Dashboard.

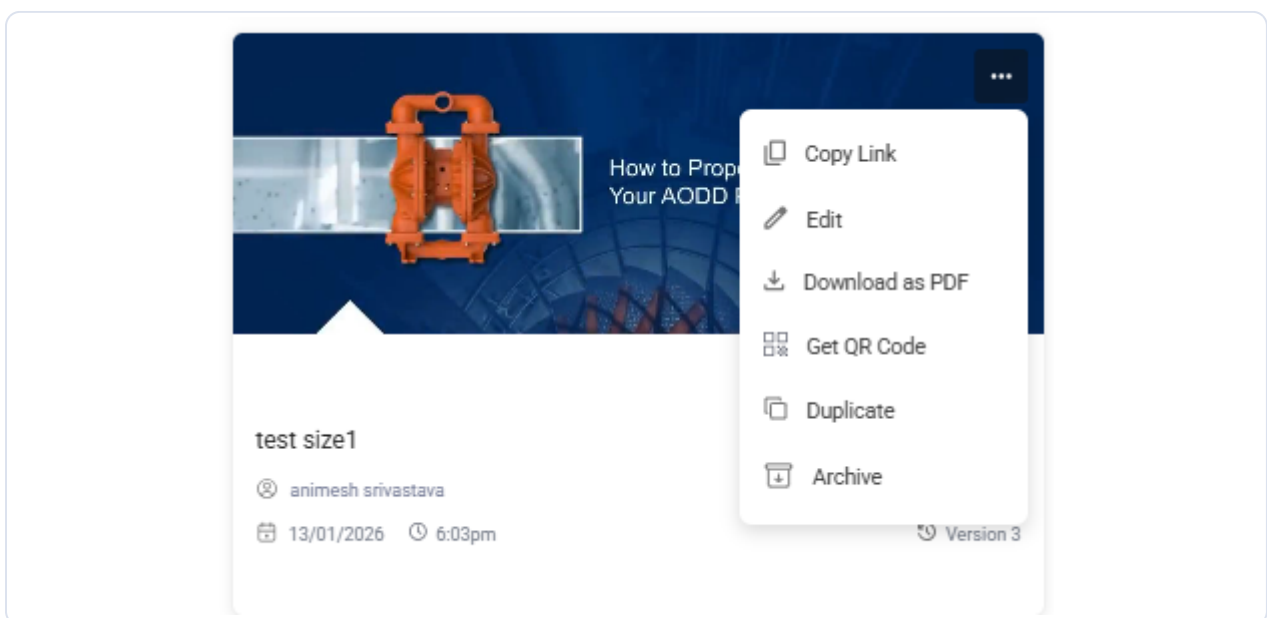
Next: [Return to the Work Instructions Dashboard to verify status and availability. \(on page 9\)](#)

9.1. Archive Outdated Instructions

Remove an instruction from active use while preserving its history for audit and reference.

Archive an instruction when equipment is decommissioned, the procedure is replaced, or the work is no longer performed.

1. On the **Published** tab, locate the instruction to archive.
2. Click the **More** icon on the instruction tile and select **Archive**.



3. Confirm the archive action when prompted.

Result

The instruction is removed from active Published availability and retained in Archive.

Next action

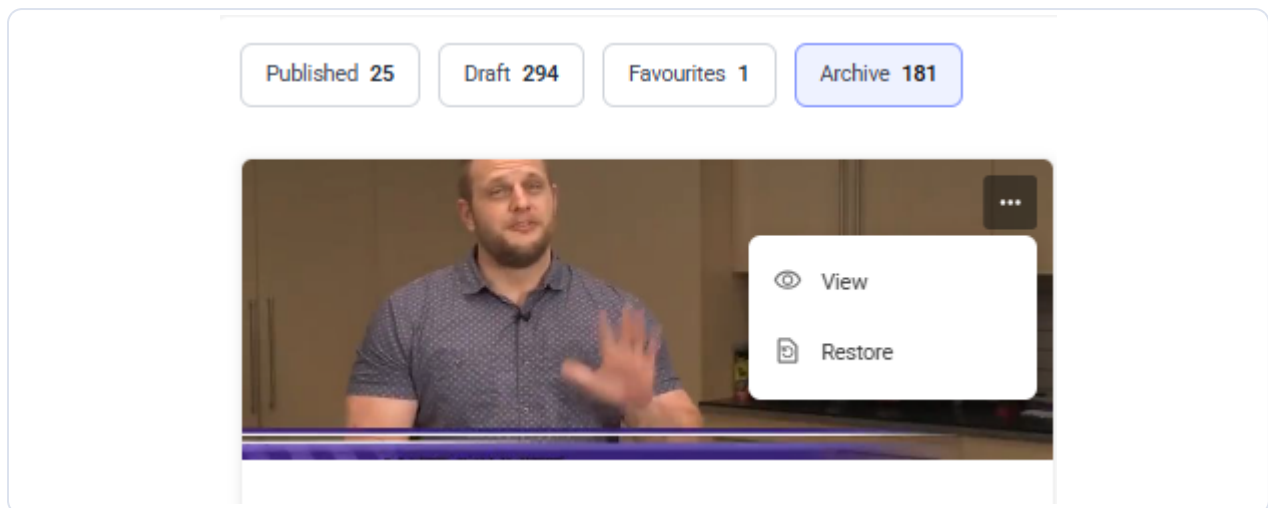
Next: Confirm the instruction is no longer available for new execution assignments.

9.2. Restore Archived Instructions

Return an archived instruction to active use after confirming that its content is still valid.

Review the instruction before restoration when equipment, safety requirements, or the procedure may have changed.

1. Open the **Archive** tab.
2. Locate the instruction to restore.
3. Click the **More** icon on the instruction tile and select **Restore**.



4. Confirm the restore action when prompted.

Result

The instruction returns to its previous applicable list and status.

Next action

Next: Verify the instruction status and availability on the dashboard before assigning it.

10. Find and Use Work Instructions

Search or filter the library to find an instruction, then use the actions available for that record.

Use search when you know the job, task, or equipment name. Use filters when you need to narrow the library by location, asset, author, or tags.

After finding the instruction, open it or use the available More-menu actions described on the Work Instructions Dashboard, such as duplicate, share, export, or QR-code generation.

Next: [Return to the Work Instructions Dashboard to verify status and availability. \(on page 9\)](#)

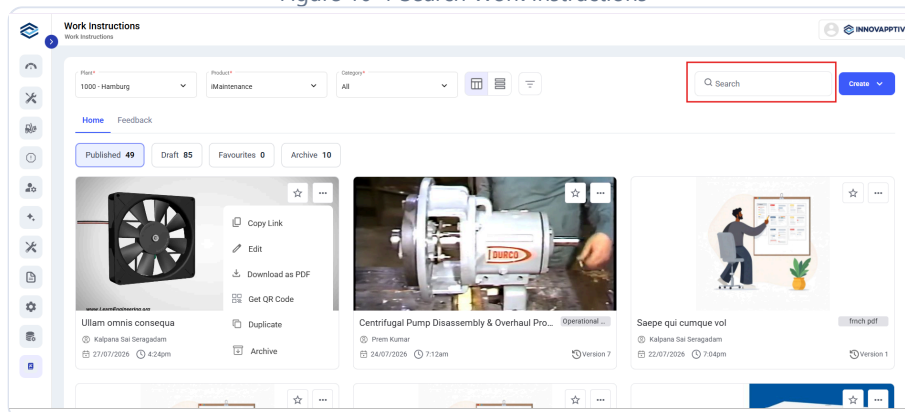
10.1. Search Work Instructions

Find an instruction by entering the job, task, equipment, or instruction name.

Use search when you know a word or phrase likely to appear in the instruction record.

1. Click the **Search** field near the top-right of the Work Instructions dashboard.

Figure 10-1 Search Work Instructions



2. Enter the job, task, equipment, or instruction name.
3. Open the required instruction from the results.

Result

The dashboard displays instructions matching the search text.

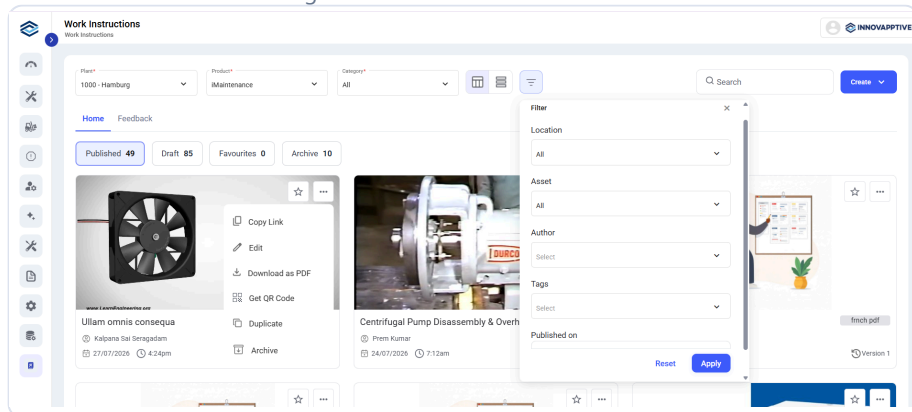
10.2. Filter Work Instructions

Narrow the Work Instructions dashboard by available location, asset, author, or tag values.

Use filters when search alone returns too many records.

1. On the Work Instructions dashboard, click the **Filter** icon.

Figure 10-2 Filter Work Instructions



2. Select the available **Location**, **Asset**, **Author**, or **Tags** values and click **Apply**.
3. Open the required instruction from the filtered results.

Result

The dashboard displays Work Instructions matching the selected filters.

Authoring Quality Checklist

Use these guidelines to write clear, consistent Work Instruction steps.

Technicians scan instructions rather than read them in full. Keep steps atomic and specific.

Write with precision — one action per step:

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."

Use visuals to show, not just tell:

- **Focus on detail:** Zoom in. A photo of the entire machine doesn't help when the instruction is about a specific valve.
- **Caption clearly:** Instead of labeling an image "Alignment," say "Align the red dot on the gear with the notch on the housing."
- **Keep a consistent angle:** Take photos from the technician's point of view so they match what the technician sees.

Structure for readability:

If a procedure has more than 10 steps, group them into sections of 3–7 steps each to create mental checkpoints.

- **Good section names:** "Preparation and Lockout," "Disassembly," "Inspection."
- **Avoid:** "Part 1," "Part 2," "Steps 1–10."



Tip:

Review published instructions at the interval defined by your organization, and whenever equipment, safety requirements, or procedures change, or a technician flags an issue.