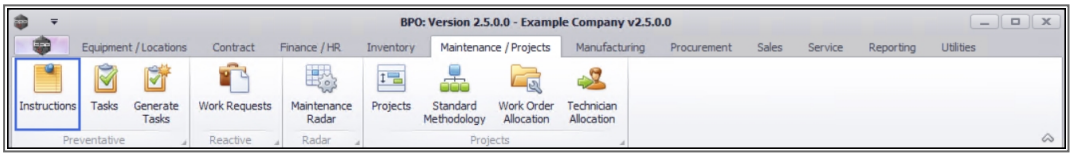
MAINTENANCE

INSTRUCTIONS - ADD / EDIT / DELETE AND VIEW AN INSTRUCTION

Instructions are 'Work Instructions' to the person performing the required work. One (or more) Instruction(s) are linked to Tasks.

Ribbon Access: *Maintenance / Projects > Instructions*



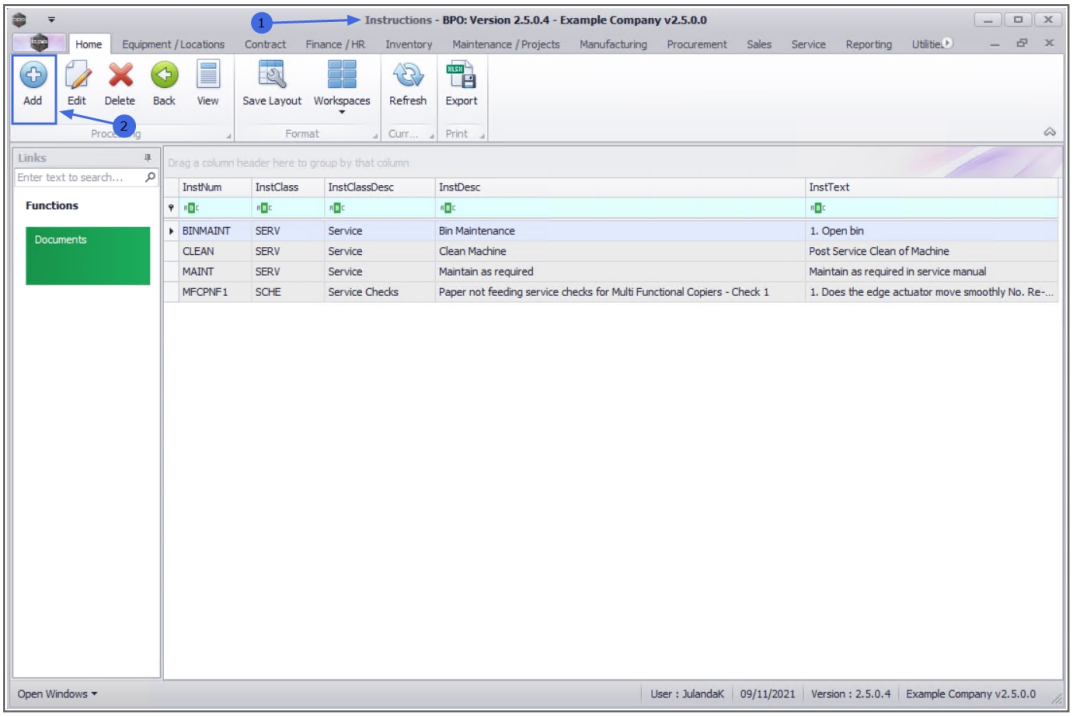
1. The Instructions listing screen will be displayed.

ADD AN INSTRUCTION

2. Click on Add.

> **Short cut key:** ***Right click*** to display the ***Process*** menu list. Click on ***Add***.

CO3 Technologies (Pty) Ltd © Company Confidential



3. The ***Instruction Maintain*** screen will be displayed.

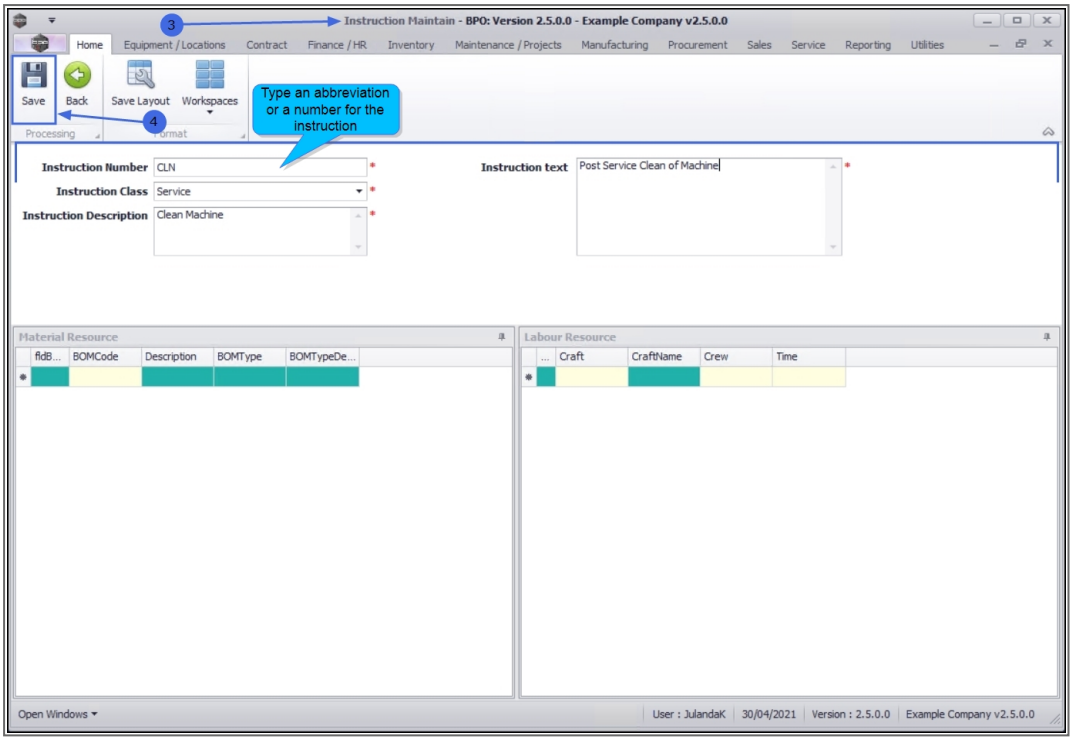
INSTRUCTION DETAILS PANEL

- **Instruction Number:** Click in the text box to ***type*** in an ***abbreviation*** or ***number*** for this new instruction.
- **Instruction Class:** Click on the down ***arrow*** to ***select*** the instruction class type from the ***list***.
- **Instruction Description:** Click in the text box to ***type*** a 'heading' or short description for the instruction.
- **Instruction text:** Click in the text box to ***type*** a description of the actual work that needs to be performed.

SAVE THE INSTRUCTION

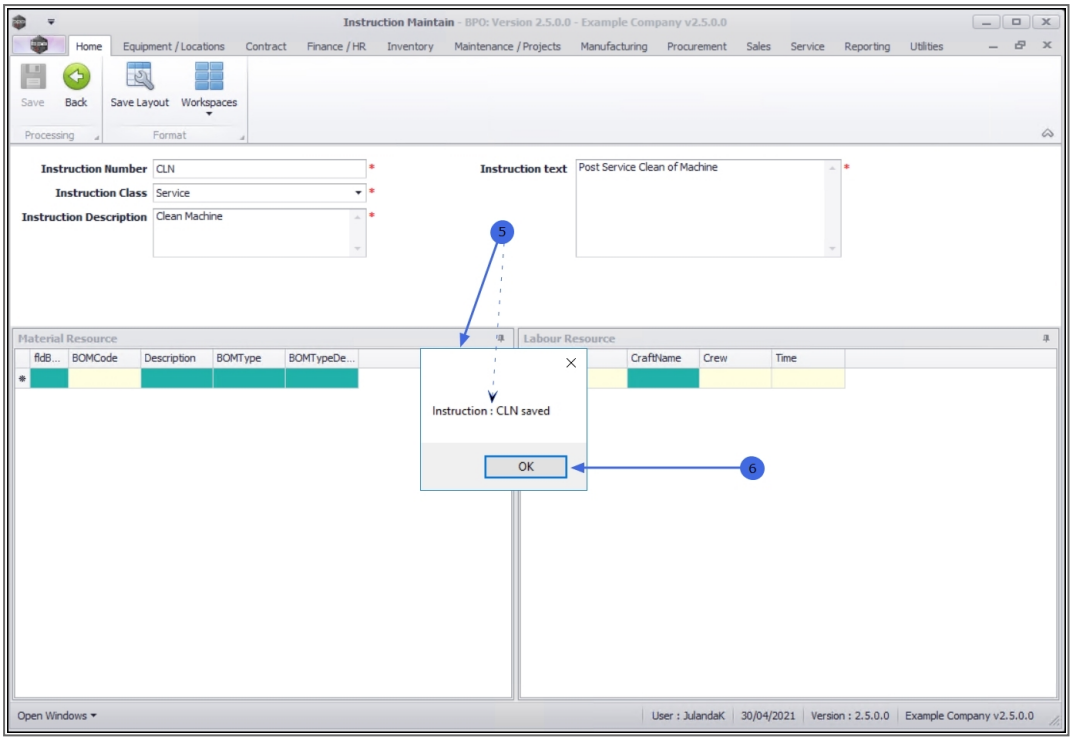
4. When you have completed the new instruction details, click on ***Save***.

CO3 Technologies (Pty) Ltd © Company Confidential

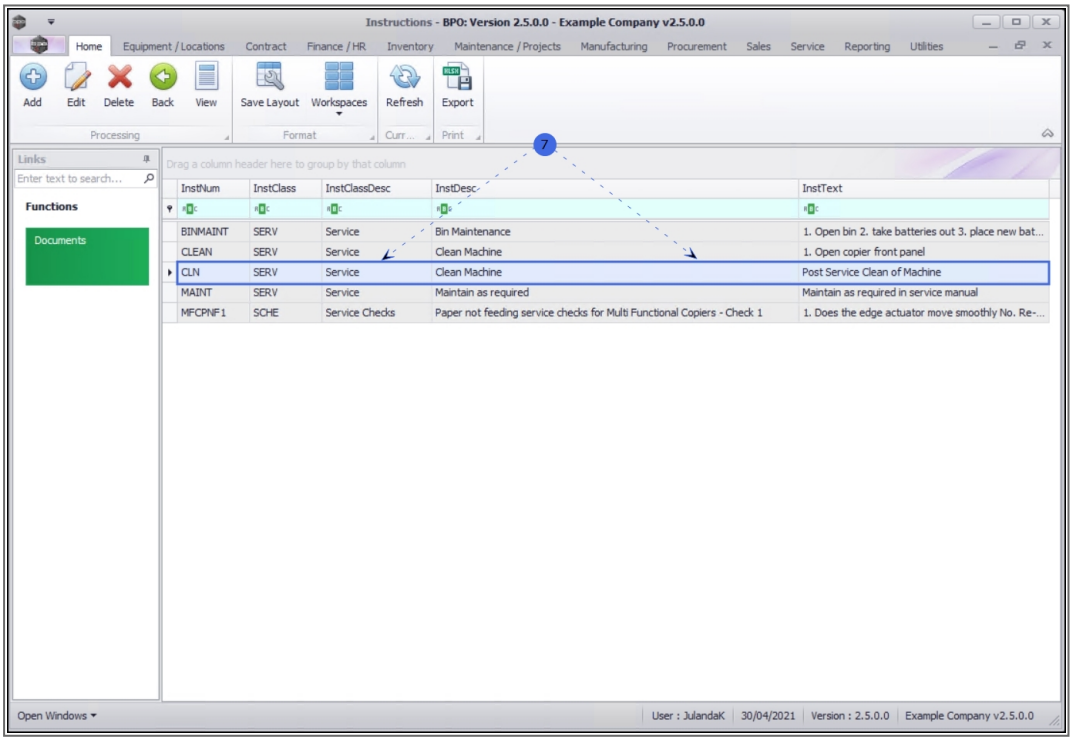


5. When you receive the message to confirm that;
    - ***Instruction:*** ***[****instruction abbrev/number****] saved.***
6. Click on ***OK***.

CO3 Technologies (Pty) Ltd © Company Confidential



7. You will return to the ***Instructions*** listing screen where you can ***view*** the newly created instruction.



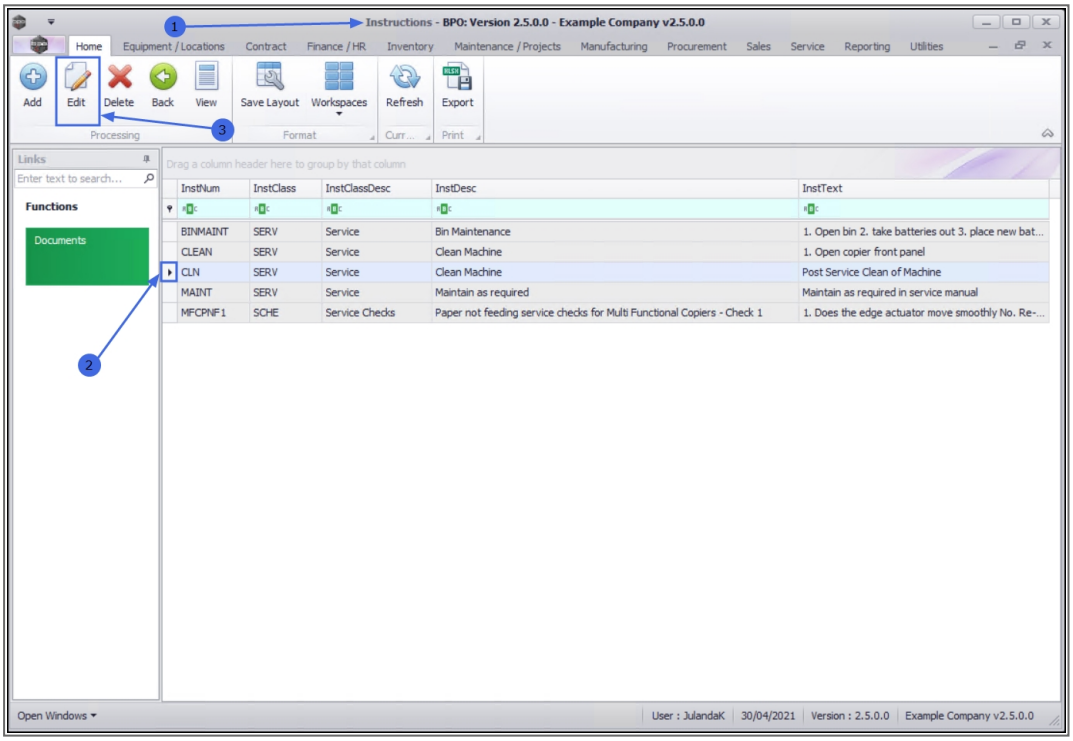
CO3 Technologies (Pty) Ltd © Company Confidential

You can now continue to link Labour, BOM or Digital Documents to the Instruction.

EDIT AN INSTRUCTION

1. From the ***Instructions*** list screen,
2. Click in the ***row*** of the Instruction you wish to edit.
3. Click on ***Edit***.

> **Short cut key:** ***Right click*** to display the ***Process*** menu list. Click on ***Edit***.

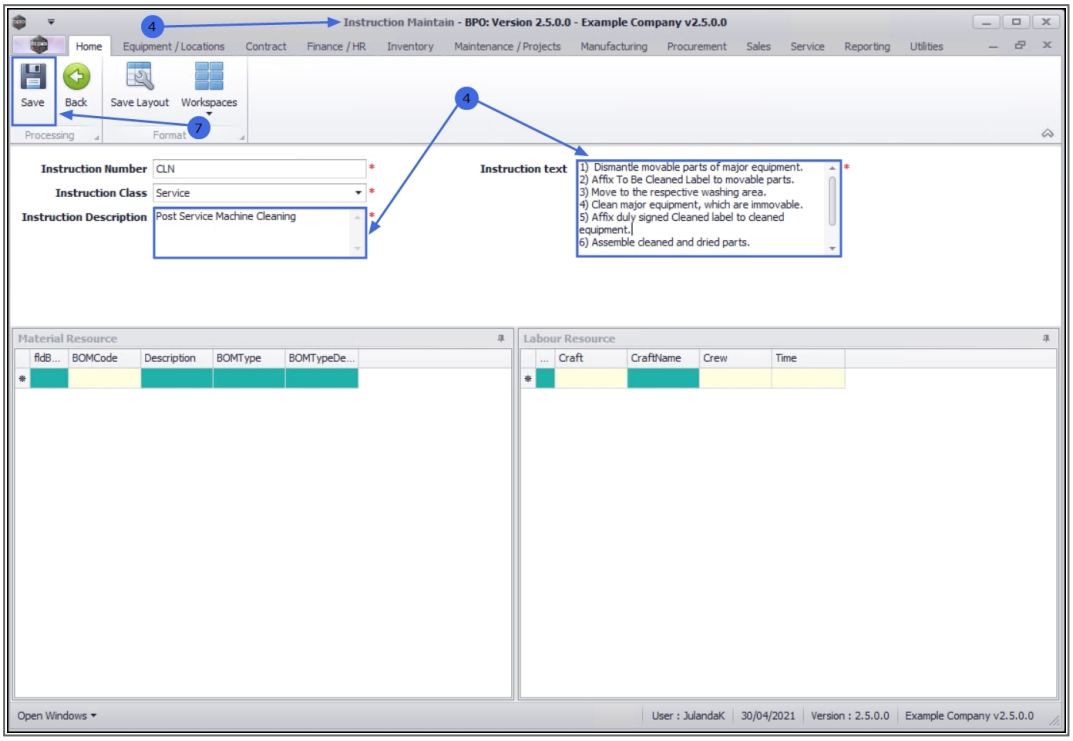


4. The ***Instruction Maintain*** screen will be displayed.
5. Make the necessary changes to the Instruction details if required.
    - The example updated the ***Instruction Description*** field and completed the ***Instruction text***.
6. Continue to link Labour, BOM or Digital Documents to the Instruction.

CO3 Technologies (Pty) Ltd © Company Confidential

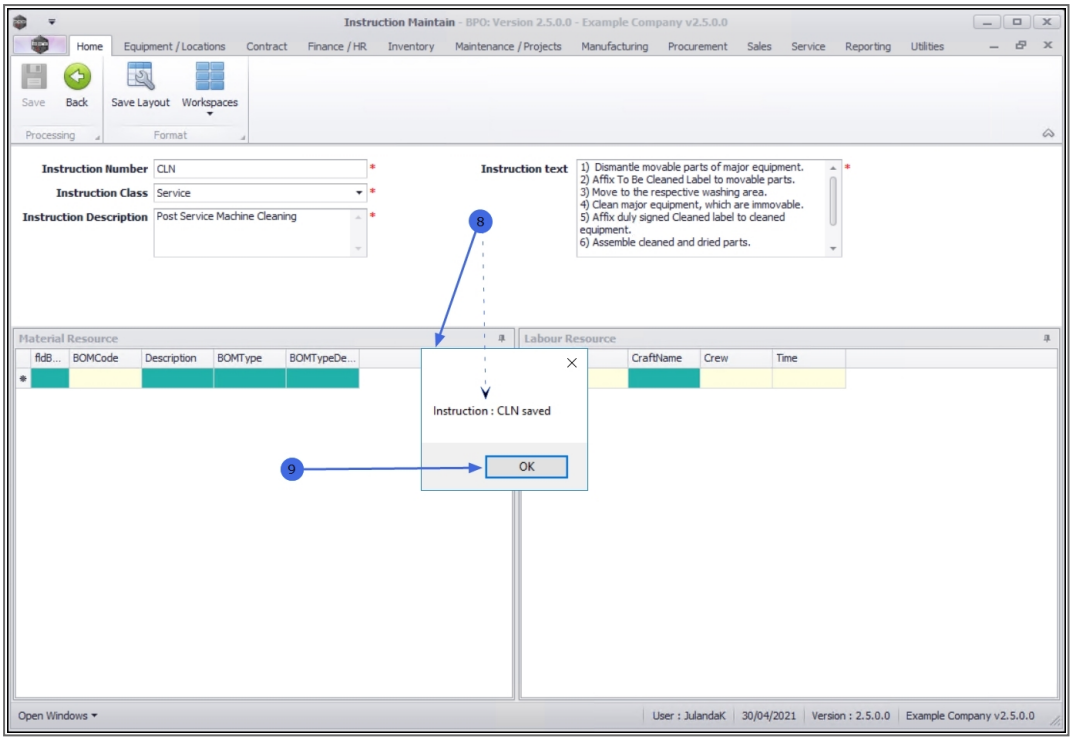
SAVE THE CHANGES

7. When you have updated the instruction information, click on ***Save***.

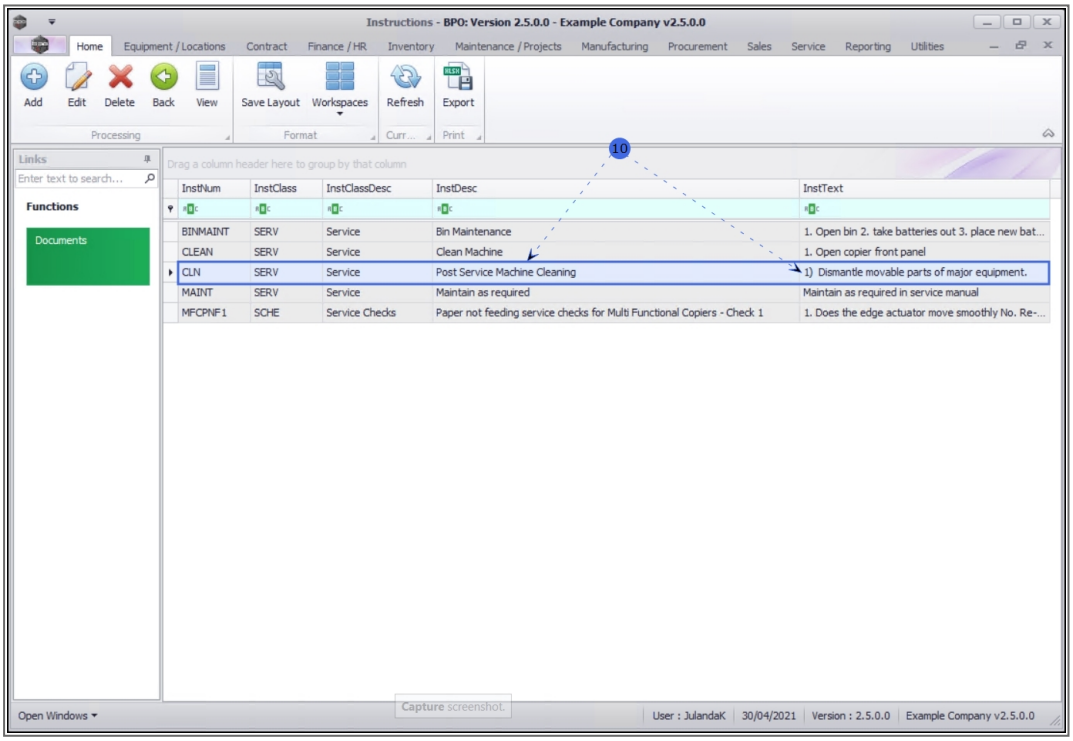


8. When you receive the message to confirm that;
    - ***Instruction: [****instruction abbrev/number****] saved.***
9. Click in ***OK*** to proceed.

CO3 Technologies (Pty) Ltd © Company Confidential



10. You will return to the ***Instructions*** list screen where you can ***view*** the updated Instruction.

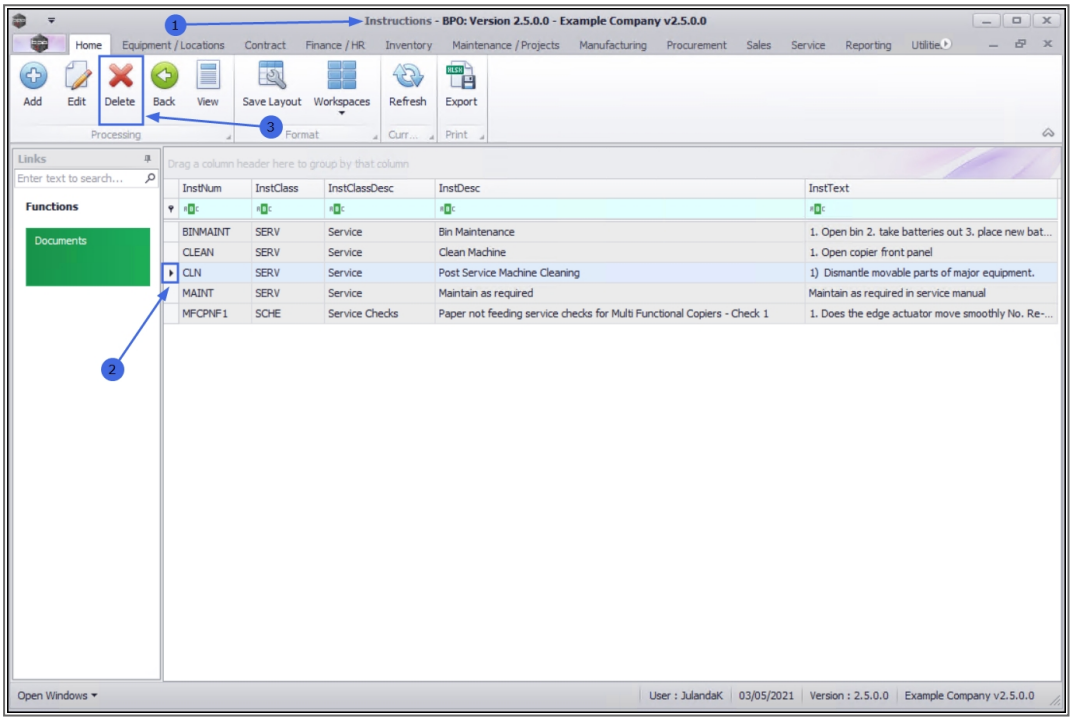


CO3 Technologies (Pty) Ltd © Company Confidential

DELETE AN INSTRUCTION

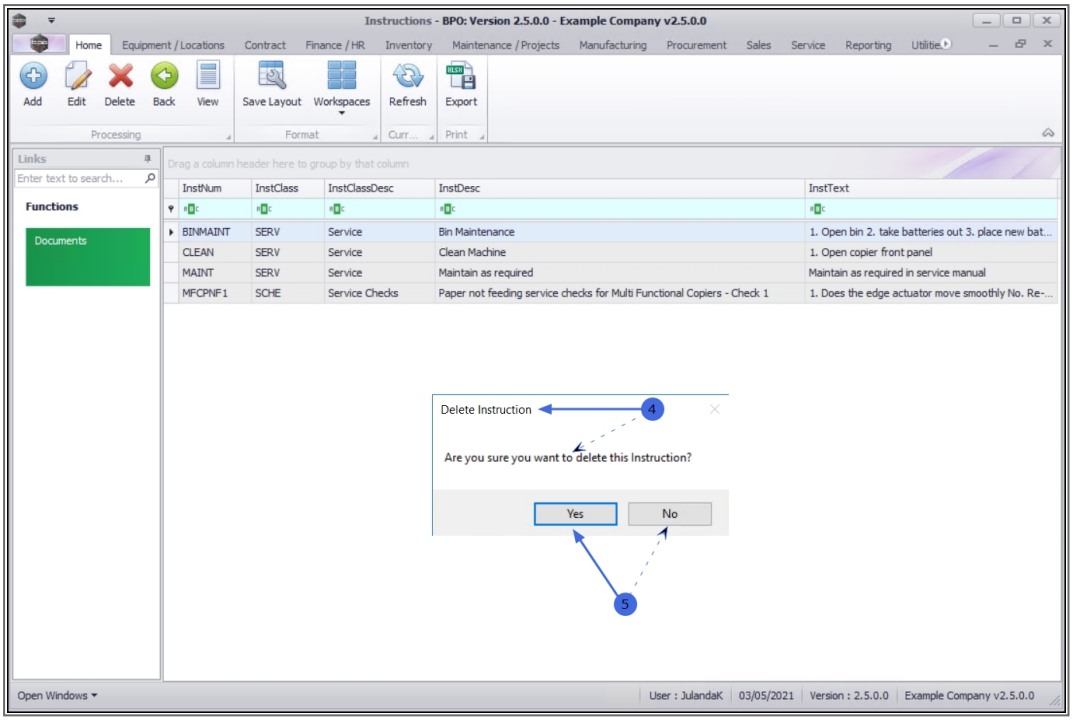
1. From the ***Instructions*** list screen,
2. Click on the ***row*** of the Instruction you wish to delete.
3. Click on ***Delete***.

> **Short cut key:** ***Right click*** to display the ***Process*** menu list. Click on ***Delete***.



4. When you receive the ***Delete Instruction*** to confirm;
    - ***Are you sure you ant to delete this Instruction?***
5. Click on ***Yes*** to remove the instruction, *if you are certain about your selection* or
    - Click on ***No*** to ignore the request and return to the Instructions list screen.
6. The instruction has been removed from the Instruction list screen.

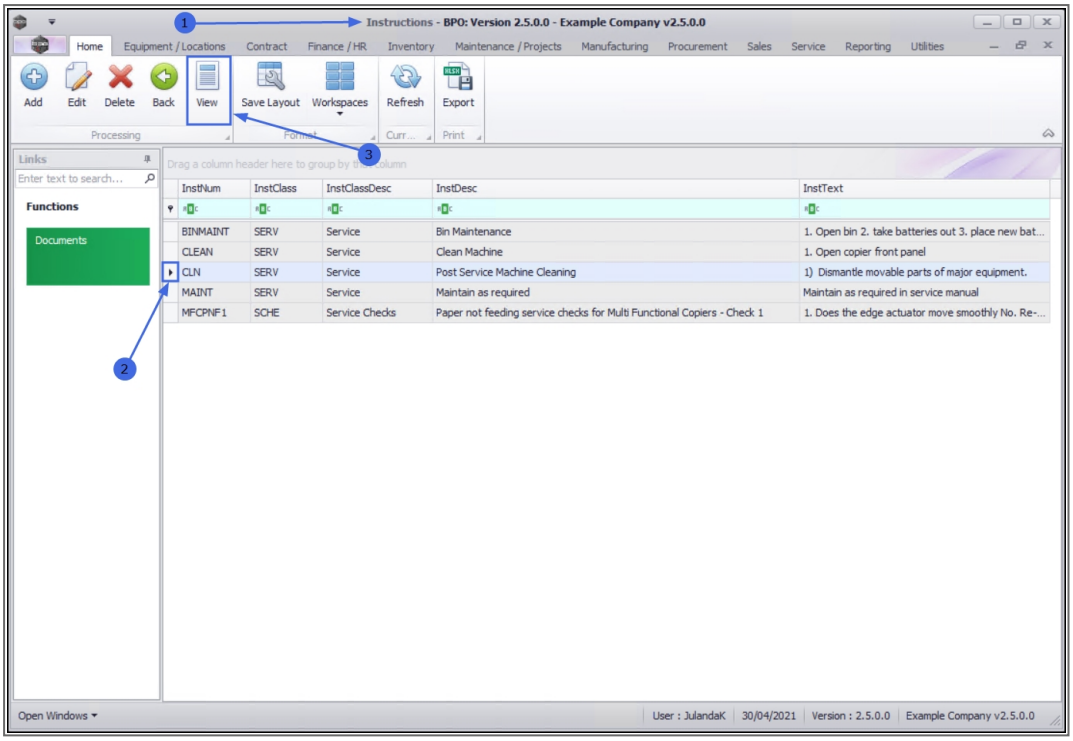
CO3 Technologies (Pty) Ltd © Company Confidential



VIEW AN INSTRUCTION

1. From the ***Instructions*** list screen,
2. Click on the ***row*** of the Instruction you wish to view.
3. Click on ***View***.

CO3 Technologies (Pty) Ltd © Company Confidential

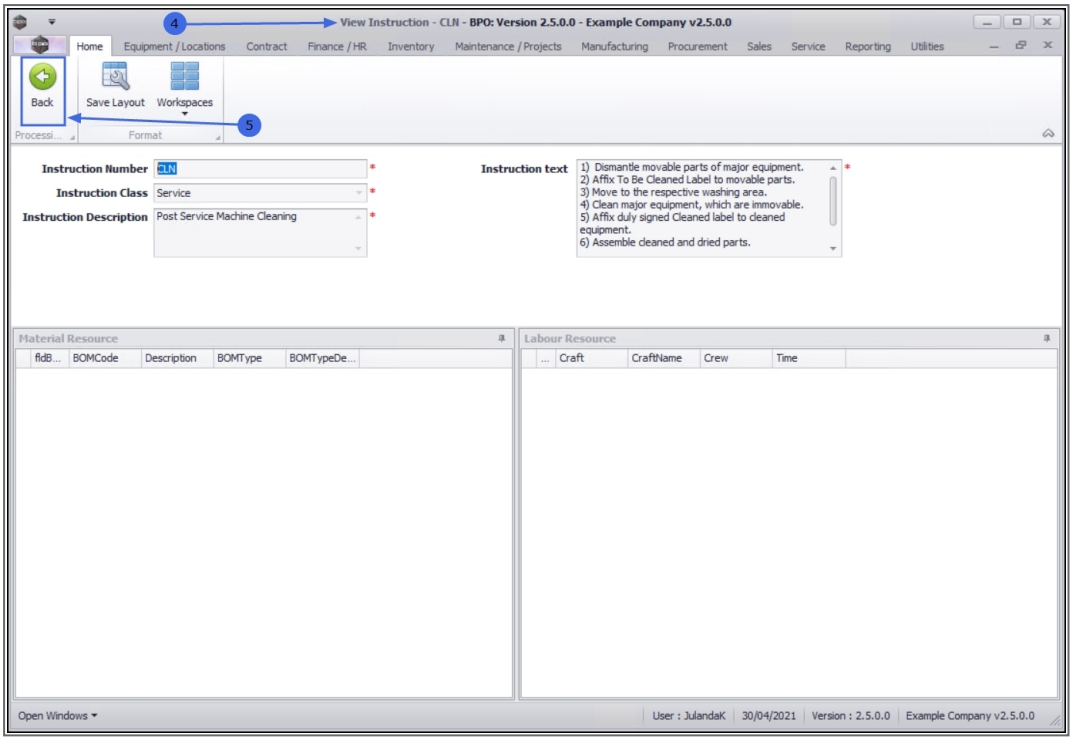


4. The ***View Instructions - [****instruction abbrev/number****]*** screen will be displayed.

> Note that all the fields for the instruction is greyed out. This is a view only screen and no changes can be made to the information on this screen.

5. Click on ***Back*** to return to the Instructions list screen.

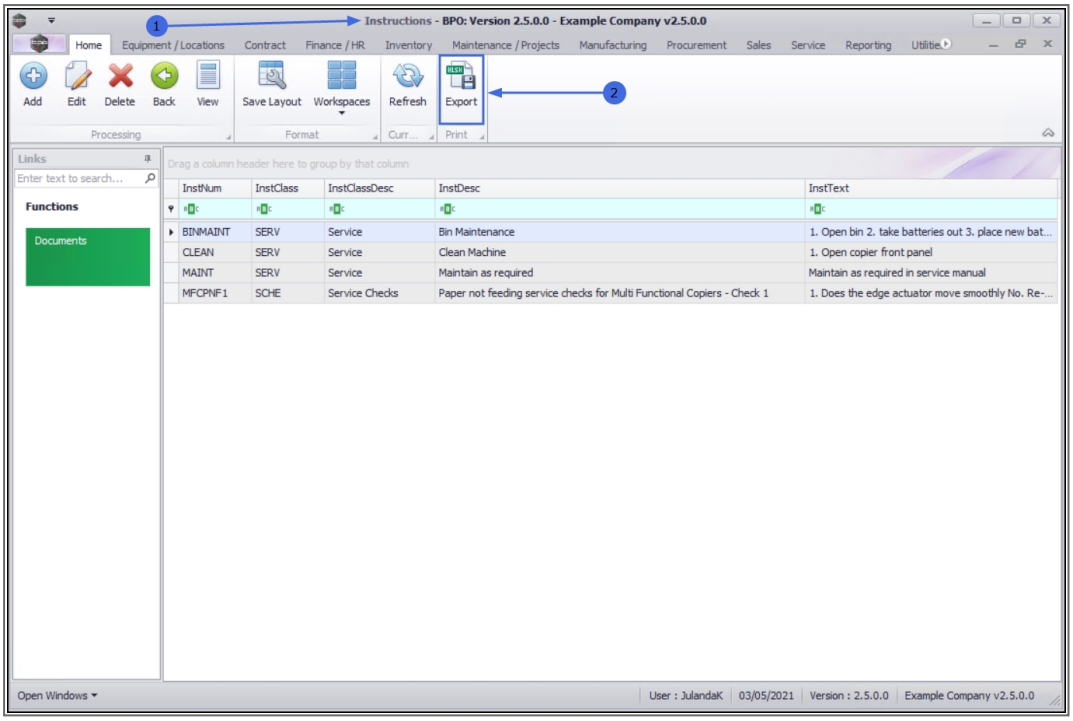
CO3 Technologies (Pty) Ltd © Company Confidential



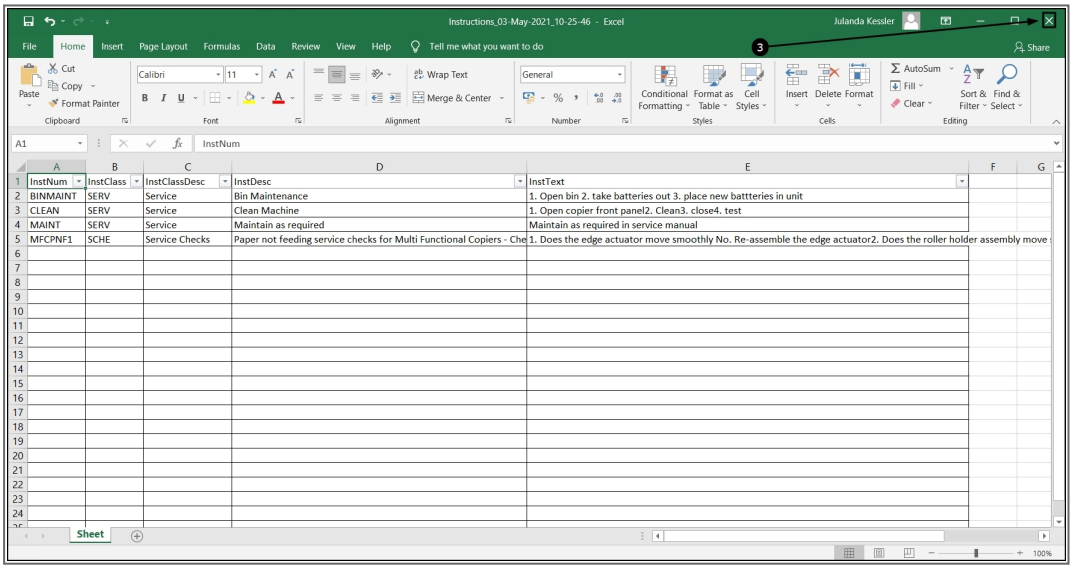
EXPORT THE INSTRUCTIONS LIST

1. From the ***Instructions*** list screen,
2. Click on ***Export*** to export a list of Instructions to a Microsoft Excel Spreadsheet.

CO3 Technologies (Pty) Ltd © Company Confidential



3. When you have completed working in Excel, ***Save*** the Worksheet and click on ***Close*** to return to the ***Instructions*** listing screen.



Related Topics

CO3 Technologies (Pty) Ltd © Company Confidential

- Link Labour to an Instruction
- Link BOM to an Instruction
- Link Digital Documents to an Instruction

MNU.043.001

CO3 Technologies (Pty) Ltd © Company Confidential