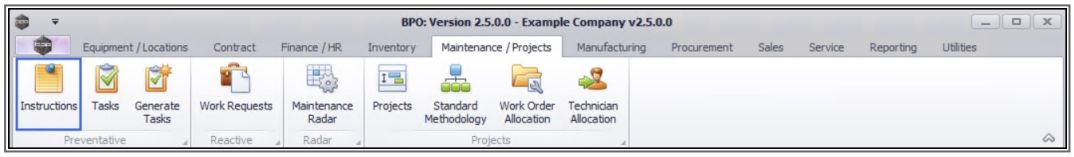
We are currently updating our site; thank you for your patience.

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**.

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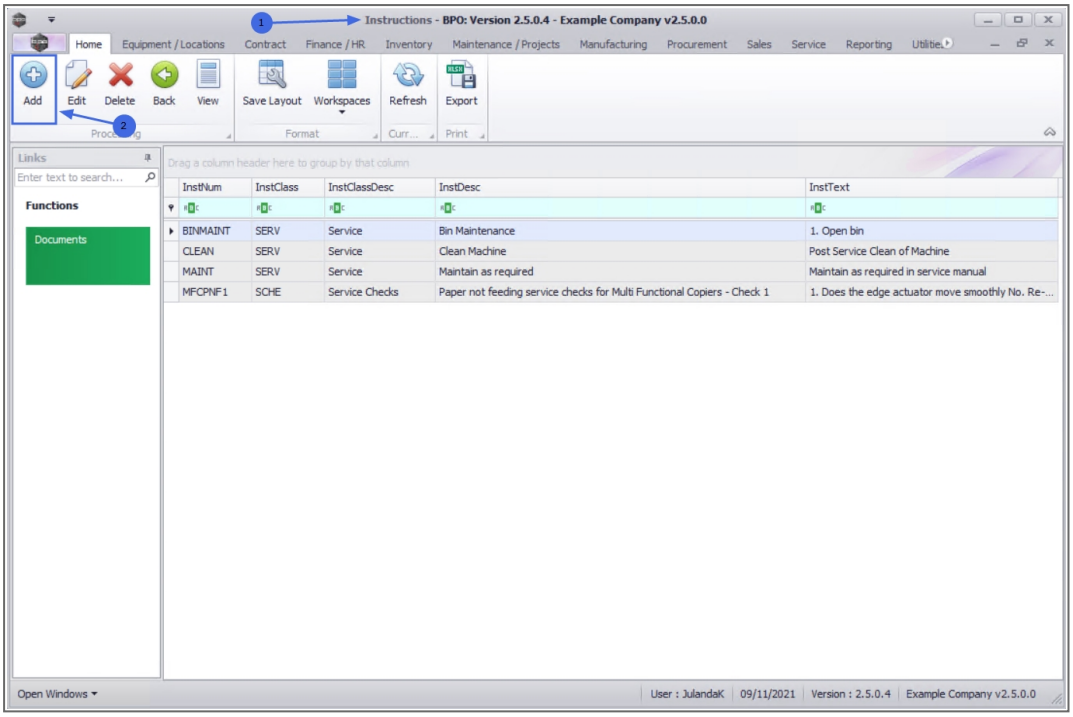

3. The **Instruction Maintain** screen will be displayed.

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**.

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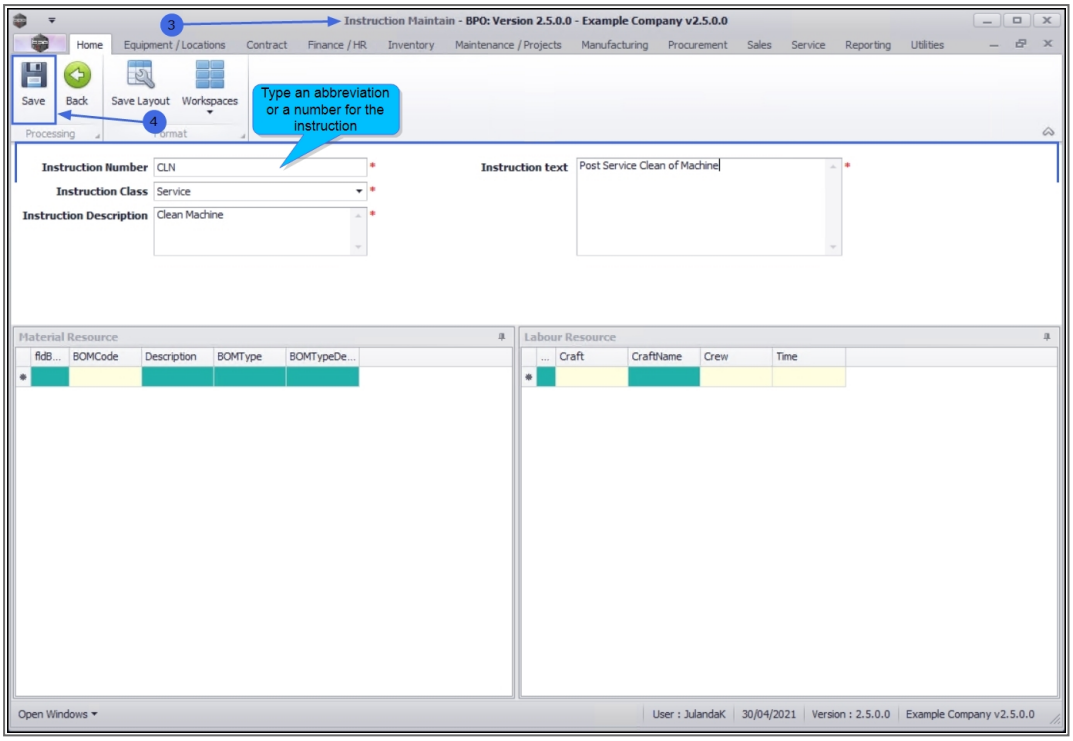

5. When you receive the message to confirm that;
    - **Instruction: [**instruction abbrev/number**] saved.**
6. Click on **OK**.

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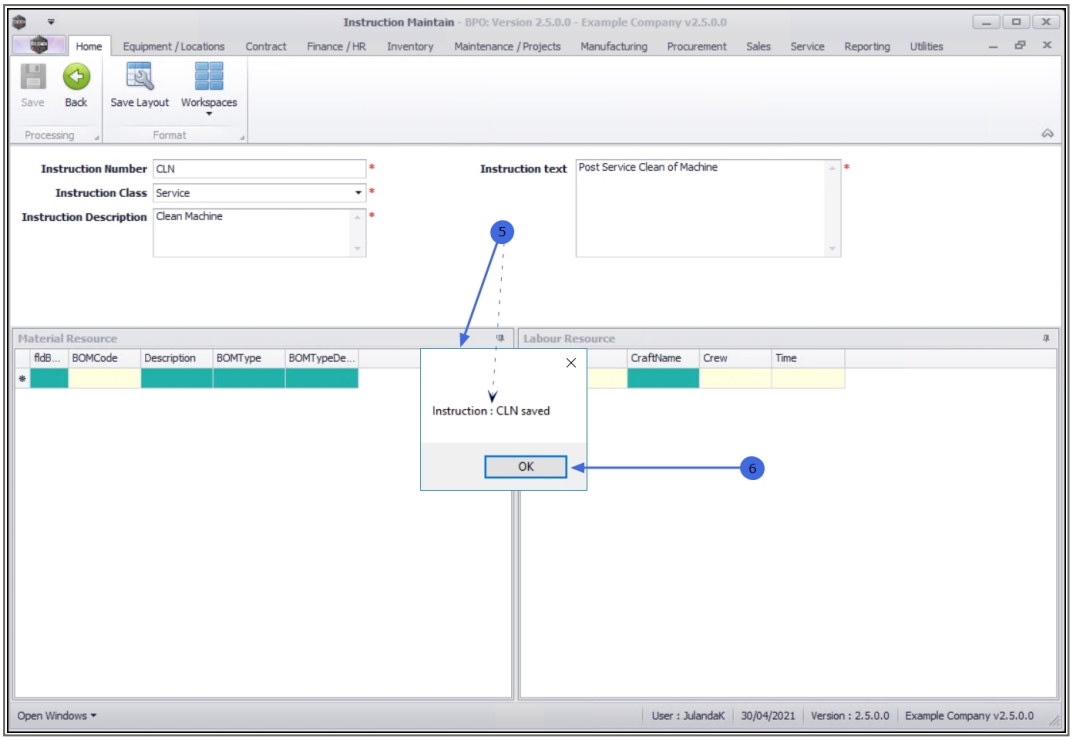
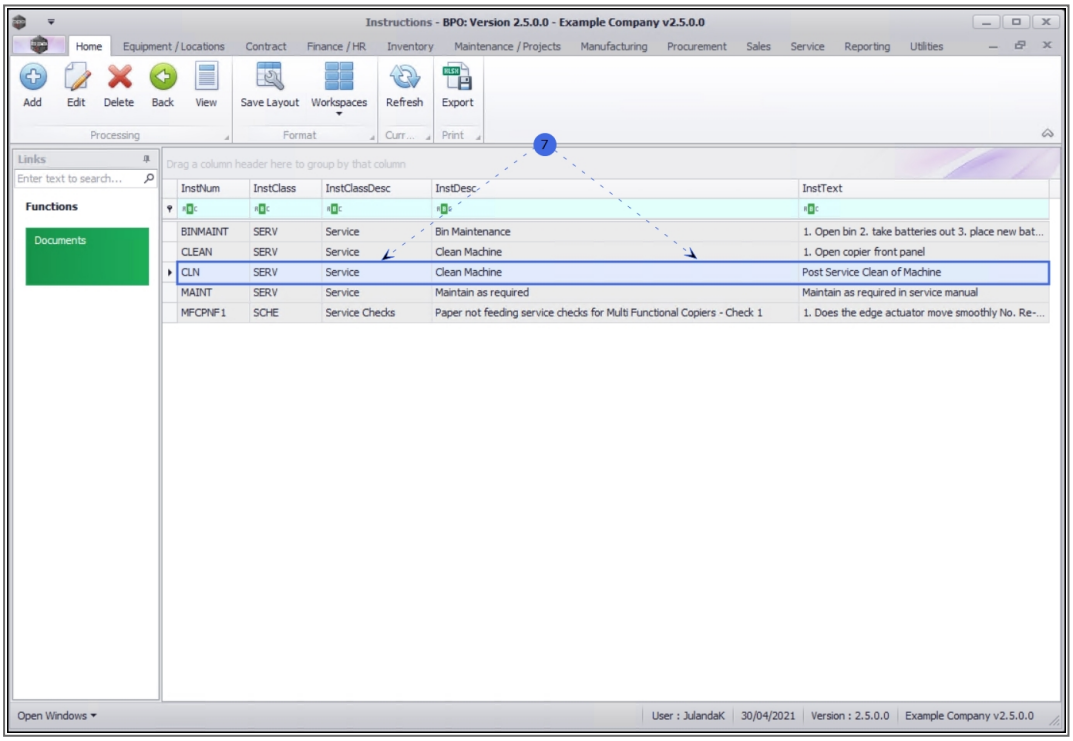


7. You will return to the **Instructions** listing screen where you can **view** the newly created instruction.



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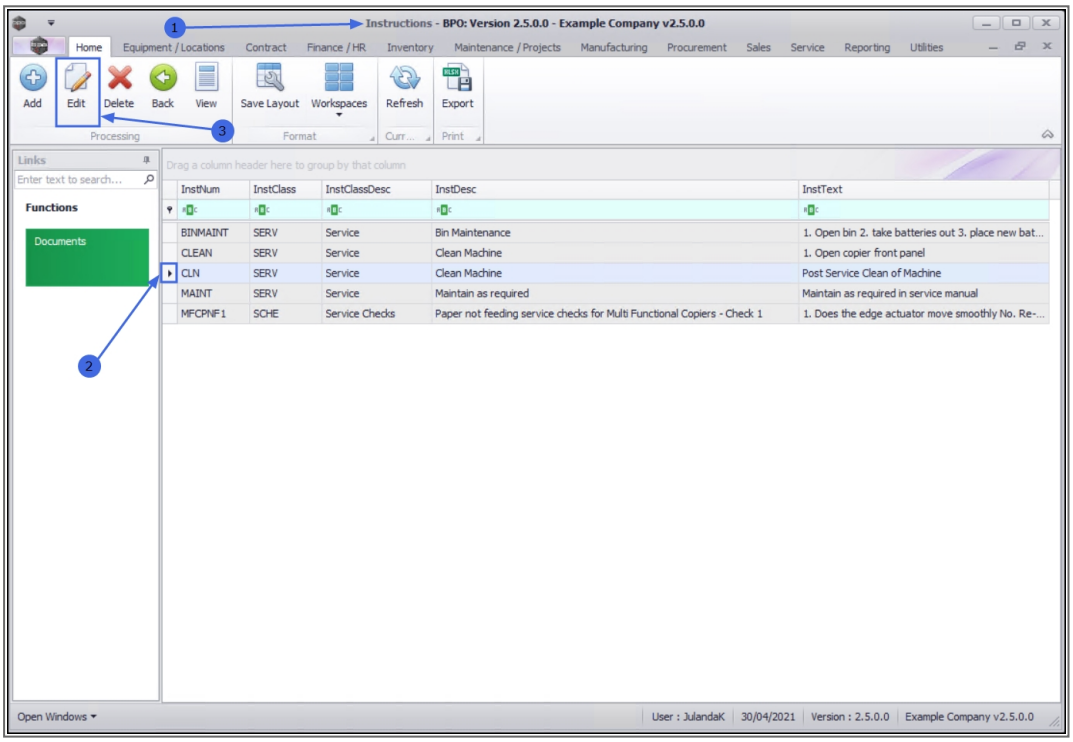
You can now continue to link Labour, BOM or Digital Documents to the Instruction.

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.

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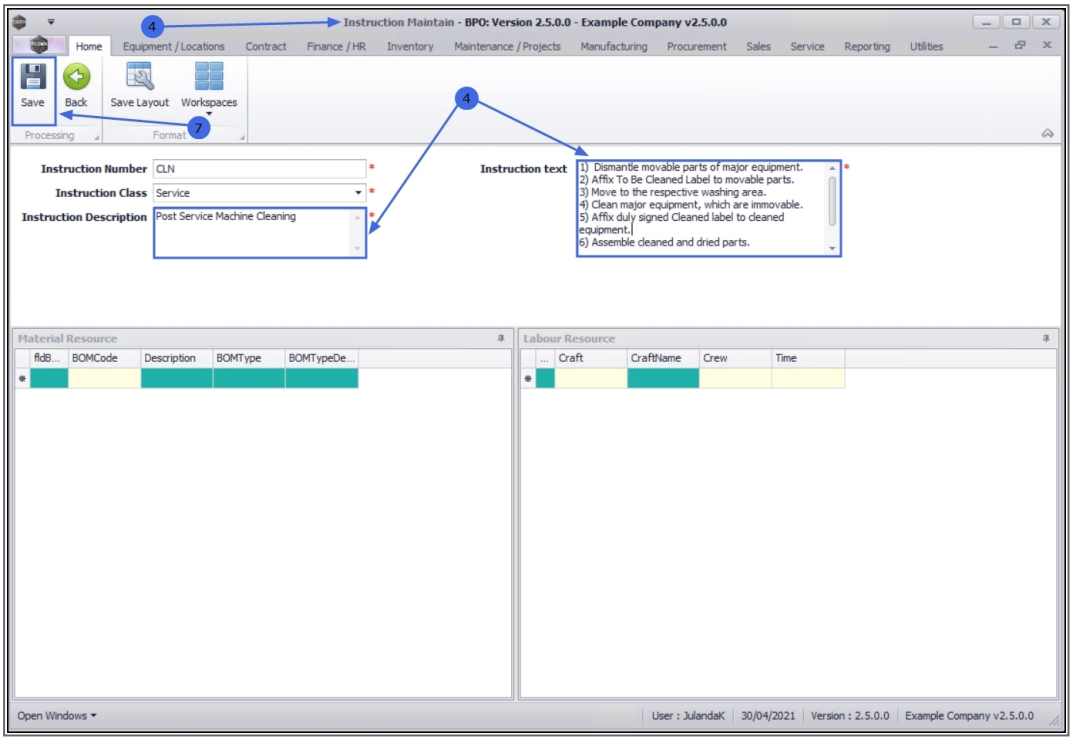
SAVE THE CHANGES

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.

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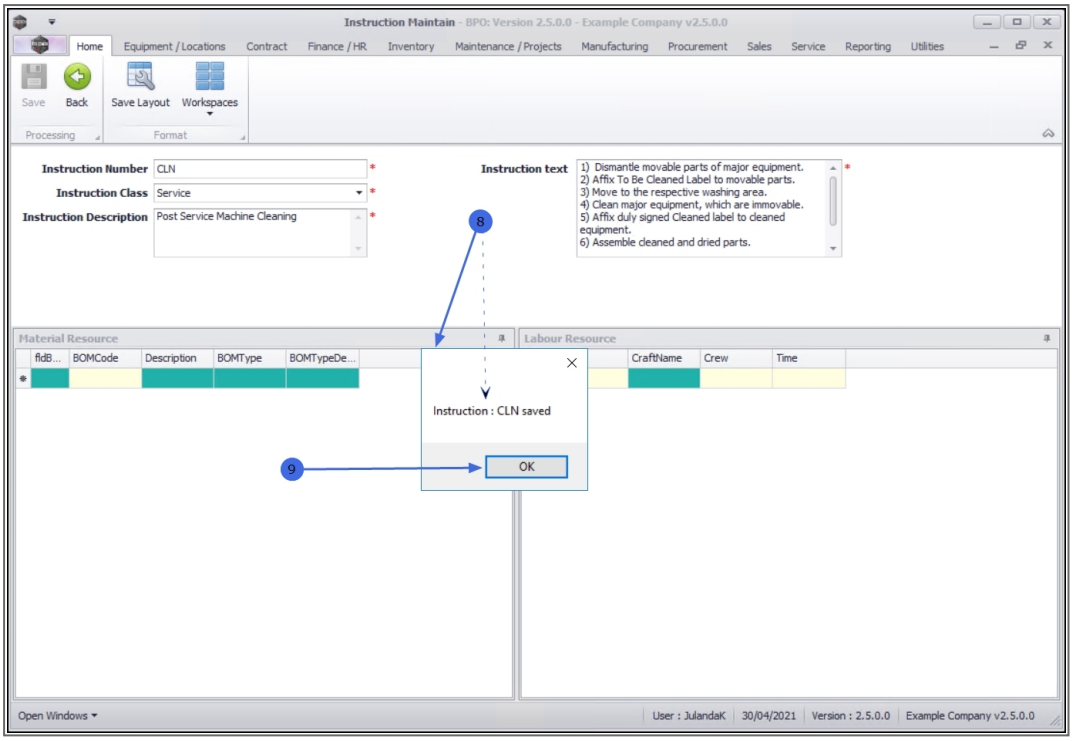
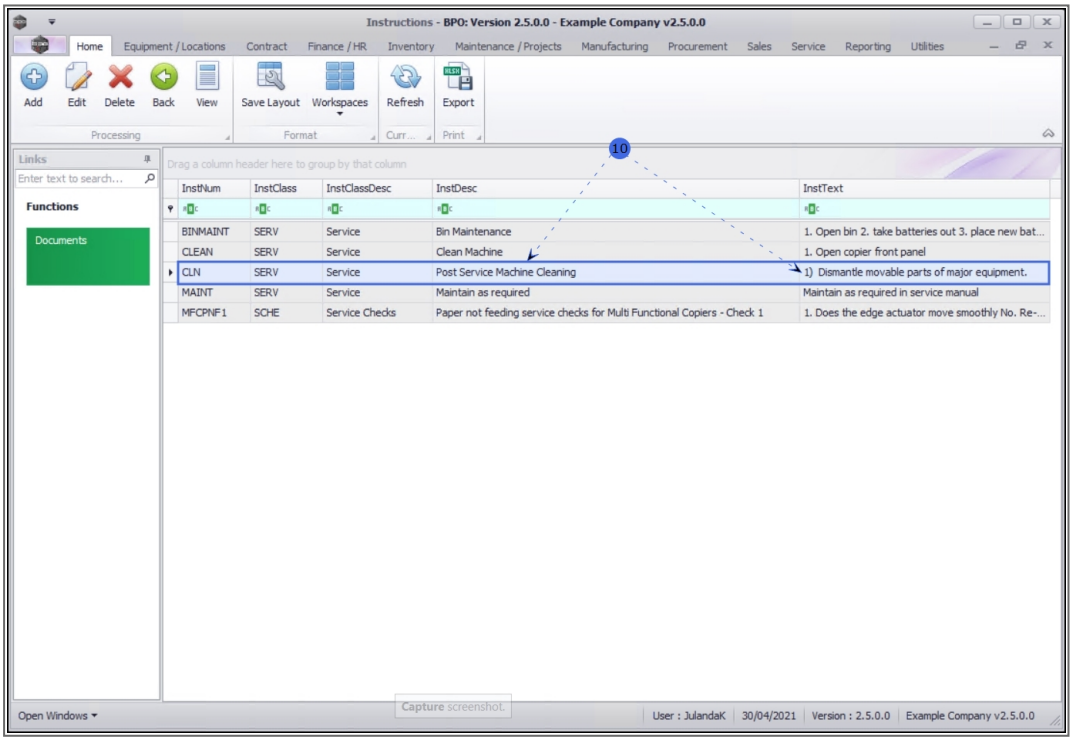


10. You will return to the **Instructions** list screen where you can **view** the updated Instruction.



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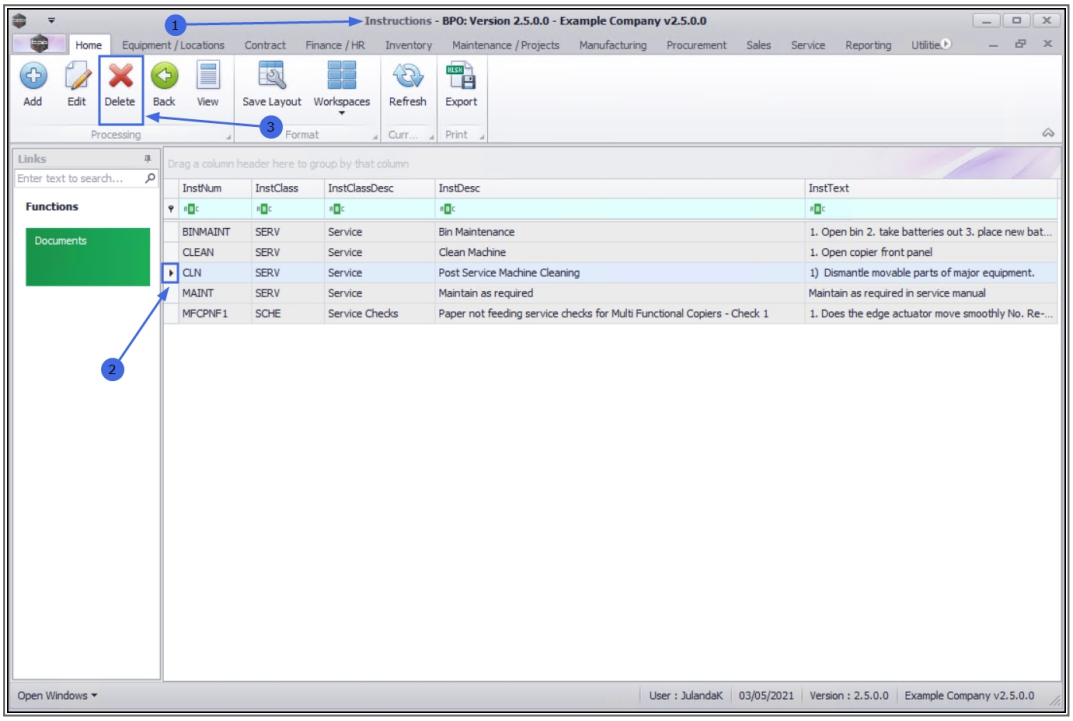
DELETE AN INSTRUCTION

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.

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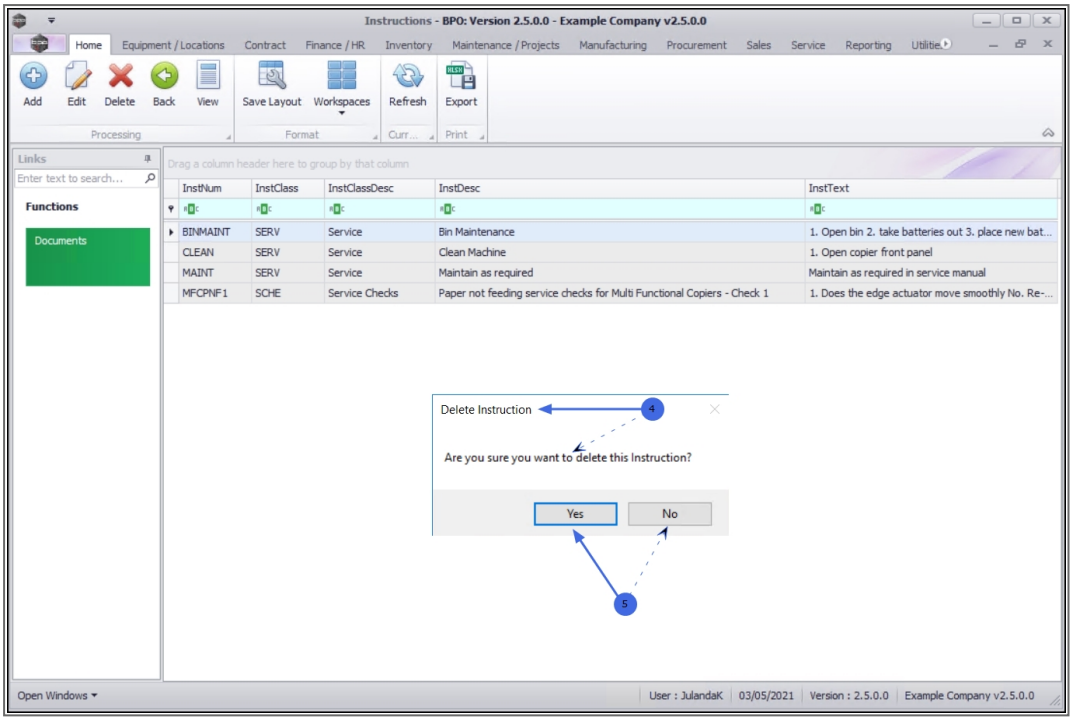

VIEW AN INSTRUCTION

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

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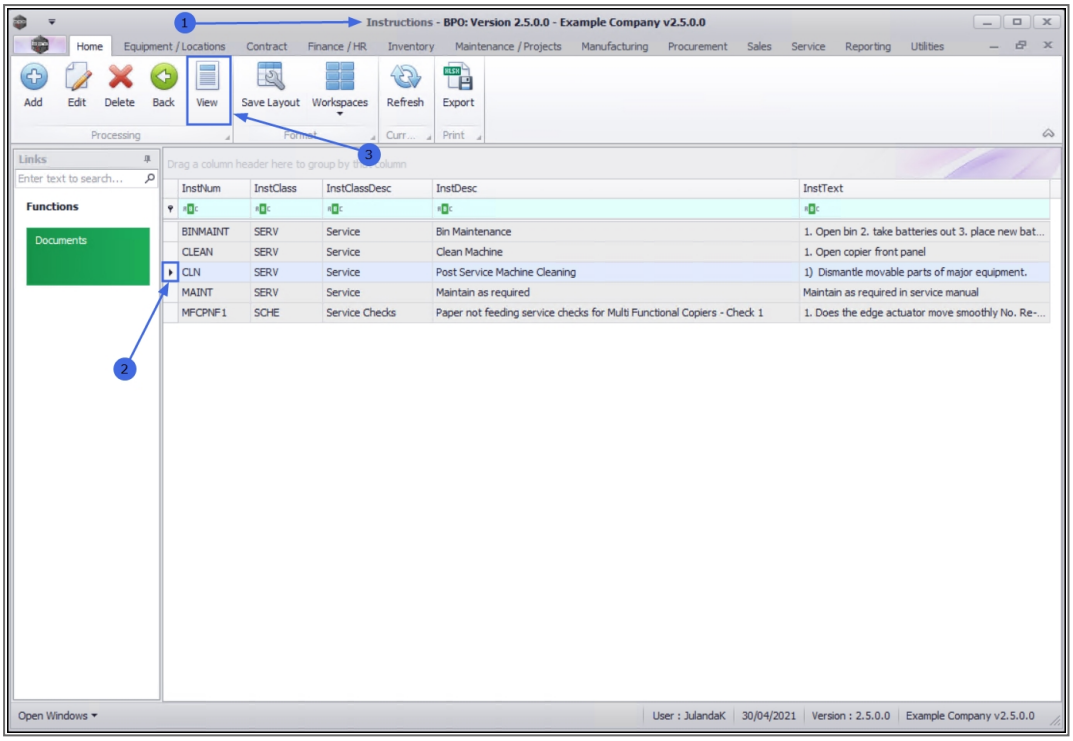

4. The **View Instructions - [**instruction abbrev/number**]** screen will be displayed.

> 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.

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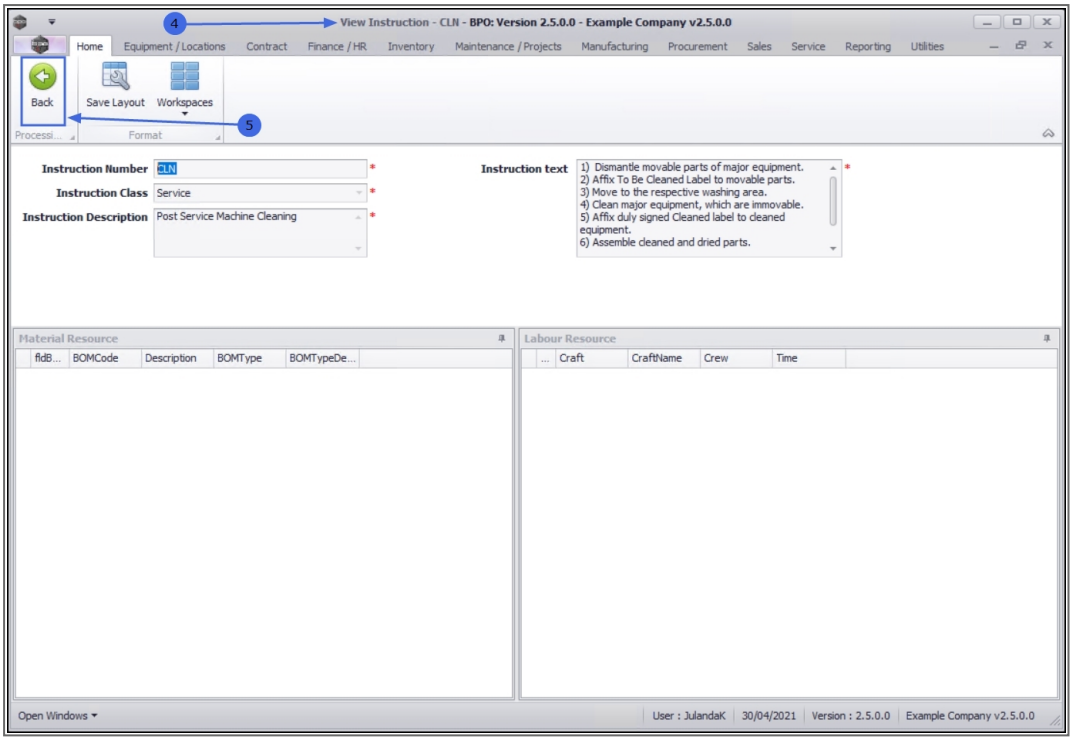

EXPORT THE INSTRUCTIONS LIST

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

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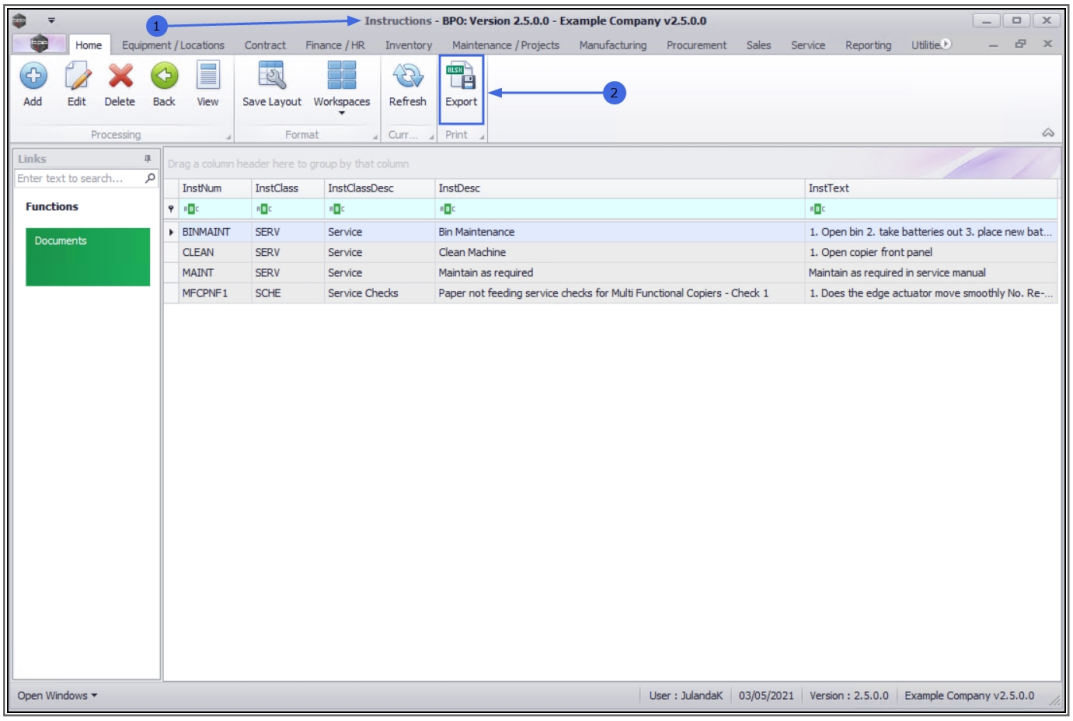
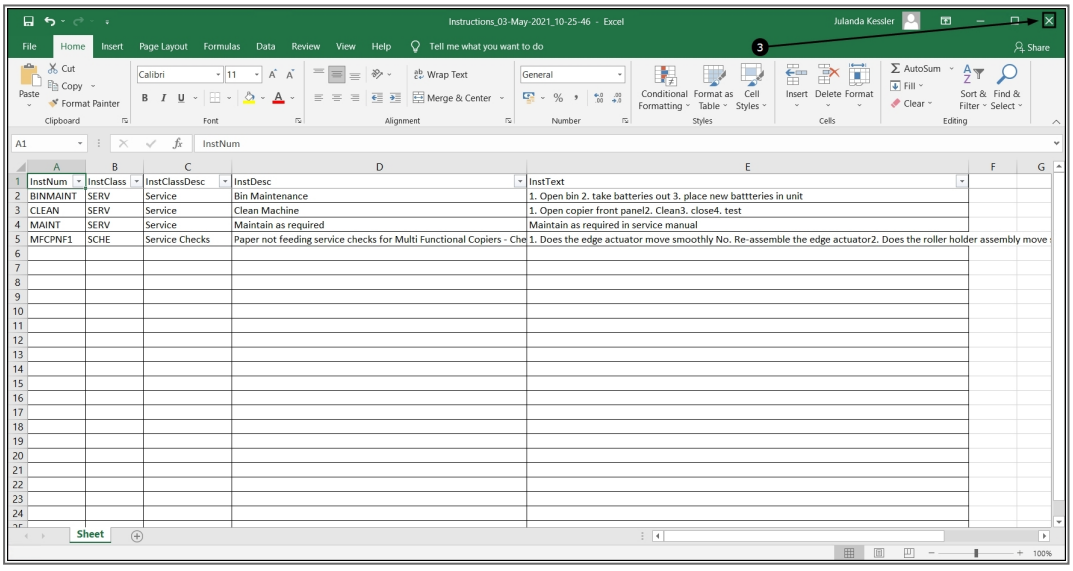


3. When you have completed working in Excel, **Save** the Worksheet and click on **Close** to return to the **Instructions** listing screen.



Related Topics

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

MNU.043.001

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