

ROUTINE QUICKSTART GUIDE

In manufacturing, consistency is everything. Without clearly defined and easily accessible standard work, even the best processes can drift—leading to variation, rework, training gaps, and missed improvement opportunities. Standard work is the foundation that enables teams to perform tasks the right way, every time, while still creating space for continuous improvement.

As a quality manager, operations leader, engineer, or continuous improvement professional, you understand the importance of controlled documentation, effective training, and real-time visibility into how work is actually being performed on the shop floor. Yet traditional approaches—binders, shared drives, static PDFs, or disconnected systems—often struggle to keep up with the pace of change in manufacturing environments.

Routine is designed to bring standard work to life. It provides a centralized platform to create, manage, and deploy work instructions, visual aids, policies, and training materials directly to the people who need them. With built-in version control, approval workflows, and flexible organization, Routine ensures your standards stay current, accessible, and aligned with how work is performed.

By using Routine, teams can reduce variation, improve training effectiveness, and create a strong foundation for quality, safety, and operational excellence. This Quickstart Guide will walk you through the core features of Routine, helping you get up and running quickly while setting the stage for long-term adoption and continuous improvement.

WHAT'S INSIDE

- KEY CONCEPTS AND TERMS
- VISUAL TOUR
- DASHBOARDS
- DOCUMENT MANAGEMENT
- OPERATIONS MANAGEMENT
- REPORTING

KEY CONCEPTS AND TERMS

- **Standard Work** – Documented best practices that define the most effective and reliable way to perform a task. Standard Work establishes consistency while serving as the baseline for continuous improvement.
- **Work Instructions** – Step-by-step instructions that guide users through a specific task or process. Work instructions may include text, images, videos, and attachments to support clear and repeatable execution.
- **Visual Work Instructions** – Work Instructions that rely on heavily on images, diagrams, or videos to communicate how work should be performed, reducing ambiguity and improving comprehension on the shop floor.
- **Documents** – Controlled files stored in **Routine**, such as policies, procedures, forms, and reference materials. Documents can be versioned, approved, and assigned to users or roles.
- **Document Control** – The process of managing documents through their lifecycle, including creation, revision, approval, publishing, and archiving ensuring users always have access to the correct version.
- **Version Control** – A system that tracks changes to documents and work instructions over time, preserving historical versions and preventing outdated information from being used.
- **Approval Workflow** – A defined process that routes documents or work instructions to designated approvers before they are published, ensuring standards are reviewed and validated
- **Training Records** – A record of user interaction with assigned documents or instructions, providing visibility into who has, reviewed, acknowledged, or completed required materials.
- **Critical to Quality (CTQ)** – A designation applied to specific steps within a work instruction that have a direct impact on quality. CTQ steps can be leveraged by other systems, such as checklists found in **Gigbot**.
- **Operations** – The defined units of "work" performed in a process. **Operations** describe *what* work is done, and standard work documents in **Routine** define *how* each operation should be performed consistently and correctly.

- **Training Matrix** - A visual chart that maps employees on the vertical (Y) axis and Operations on the horizontal (X) axis, showing training levels for each employee-operation combination. Training matrices help identify skill gaps, support cross-training, and assist with assigning work based on competency.
- **Operator Loading Charts (Yamizumi Charts)** - A visual workload-balancing tool used to assign operations to operators based on cycle time. Operator loading charts help managers identify bottlenecks, balance workloads, and ensure no operator is over- or under-utilized.
- **Document Types** - Categories used to organize and manage different kinds of content in Routine. Common document types include policies, manuals, and standard work instructions, along with additional document types that can be defined at the site level to meet organizational needs.

DASHBOARDS

Routine's dashboard is your central hub for managing standard work, documents, and training activity across the organization. It provides an at-a-glance view of key information such as assigned work instructions, documents awaiting approval, recent changes, and training or acknowledgement activity. Designed to support different roles, the dashboard gives operators, managers, and leaders quick access to the information most relevant to their responsibilities.

The image shows a screenshot of the Routine dashboard interface. The dashboard is divided into several sections:

- HOME**: Located at the top left, indicated by an arrow pointing to the home icon.
- PERSONAL INFO**: Located at the top right, indicated by an arrow pointing to the user profile icon.
- SIDE MENU**: Located on the left side, indicated by an arrow pointing to the navigation menu.
- COMPONENTS**: A central label with arrows pointing to various dashboard widgets, including:
 - Your Assignments**: A table with columns for Assignment, Description, Create Date, Due Date, and Assignee. It lists items like "Document Approval: Rescue Checklist" and "Document Approval: Test".
 - Your Requests**: A table with columns for Assignment, Description, Create Date, Due Date, and Assignee. It lists items like "Document Approval: Test" and "Document Approval: Rescue Checklist".
 - Departments Performance**: A table with columns for Departments, Total Count, In Progress, Past Due, and Approval %.
 - Document Type**: A donut chart showing the distribution of document types: Policy (0.0%), Records (0.0%), Manual (0.2%), Procedures (0.3%), and SIA regulatory process (0.0%).

Home - This button takes you to your Optegrity home page, where you can access other Optegrity applications, view global settings, and update your user profile.

Side Menu - This menu allows you to quickly navigate through the application, providing easy access to key features like defect tracking, checklists, and reports.

Personal Info - Clicking this option lets you view and update your personal information, such as contact details, password settings, and user preferences.

Components - These are customizable containers of information that display key data and metrics at a glance, ensuring you have the insights you need right on your dashboard.

SIDE MENU



Dashboard - This button takes you back to the main dashboards.

Operations - This is where users can access the operations database, upload new operations or search existing operations and their associated standard work documents.

WIP - This is where users can open the WIP tracker, including configuration settings, the live tracker view, and the WIP report.

Hazards - This is where users can navigate to the Job Hazard Analysis (JHA) section of Routine.

Alerts - Here you can view notifications.



Report - Here you can access **Routine's** reporting tools, including employee-focused and operations-focused reports which are covered in more detail later in this guide.

Settings - This button takes you to application specific settings.

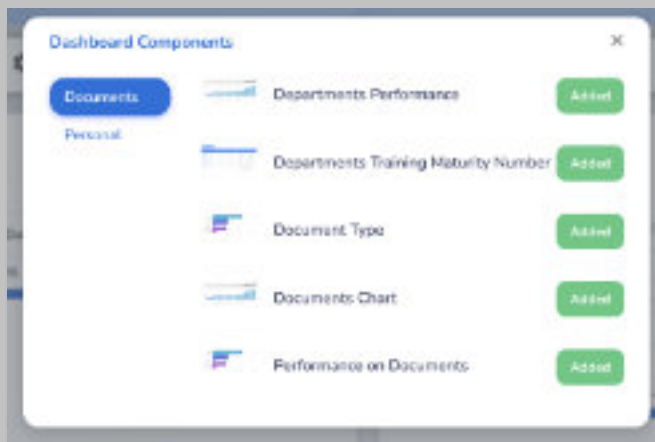
CREATING AND EDITING DASHBOARDS

Routine allows you to customize your dashboards to display the most relevant information for your role. In this section, you'll learn how to create, edit, and personalize dashboards to suit your workflow.



Locate Dashboard Controls

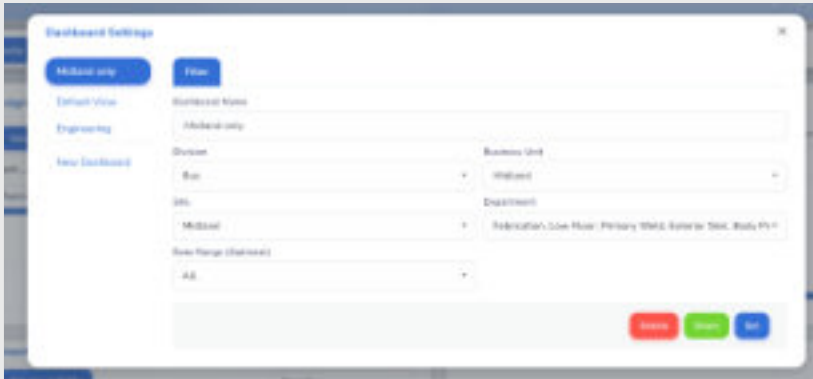
Dashboard controls are in the top-left corner of the dashboard screen. Use these controls to adjust or manage your dashboard.



Add a Component to a Dashboard

1. Click the **"Add Component"** button to bring up the component selector screen.
2. Browse the list to find the component you want to add, then click **"Add"** to place it on your dashboard.

Edit an Existing Dashboard



1. Click the "**Dashboard Settings**" button to open the settings popup.
2. From the list on the left-hand side, select the dashboard you want to edit.
3. Adjust the scope of data by choosing from the **Division**, **Business Unit**, **Site**, and **Department** dropdowns.

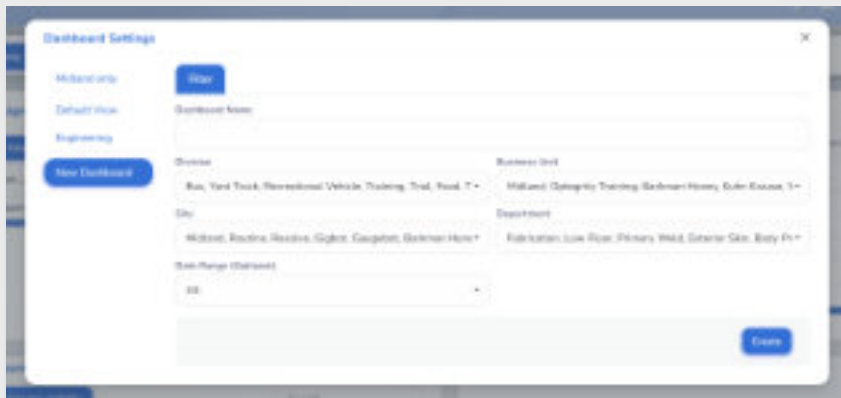


Share a Dashboard



1. In the **Dashboard Settings** popup, select the dashboard you want to share and click "**Share**".
2. Add an optional message or note in the "**Note**" section.
3. Select the user you want to share with from the dropdown box and click "**Share**".

Create a New Dashboard



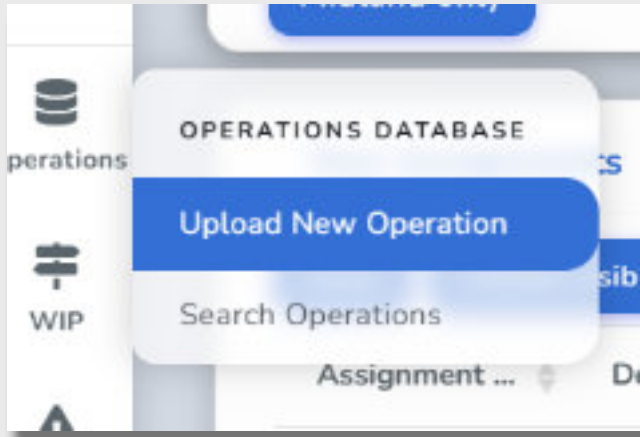
1. Click "**New Dashboard**" in the **Dashboard Settings** popup.
2. Enter a name for the new dashboard and select the desired scope of data.
3. When ready, click "**Create**" to finalize your new dashboard.
4. Then begin adding components following the instructions above.

CREATING A NEW OPERATION

In Routine, documents and operations are closely connected—operations define the work being performed, and documents describe how that work should be done. There are two primary ways to create a document or operation within the system. Users can upload an existing file (such as a PDF, Excel file, or PowerPoint), which allows organizations to maintain their current formats and quickly migrate content into Routine.

Alternatively, users can build documents using Routine's system templates. While uploading existing files is often faster, creating work instructions within the system provides significant advantages, including compatibility with Routine's MES functionality, integration with Gigbot quality checks, and greater control over structured data. In this section, we'll walk through both methods so you can determine which approach best fits your organization's needs.

UPLOADING EXISTING DOCUMENTS



Open the "Upload New Operation" screen

1. Hover over the **Operations** icon in the side menu.
2. Select **Upload New Operation** from the drop down menu.

Input Document Information

Before uploading or building a document in Routine, users will complete the Input Document Information section. The details entered here form the header or cover page of the document and establish how it will be categorized, tracked, and controlled within the system

 A screenshot of the "Input Document Information" form. At the top right, there are two buttons: "Design & Conversion" (blue) and "Start From Where You Left Off" (green). The form contains several input fields:

- Description* (text input)
- Document Internal Code (text input)
- Expiration Date (date input, showing 02/03/2017)
- Retention Years (dropdown menu)
- SKUs (dropdown menu)
- Parts (dropdown menu)
- Training Type (dropdown menu)
- Operator/Gen (dropdown menu)
- Operator Count (text input)
- Operator Skill Level (dropdown menu)
- Operation Type (dropdown menu)
- Operator Total Time (Minutes) (text input)
- Operator Cycle Time (Minutes) (text input)
- Value Added/Action Time (Minutes) (text input)
- Idle/Action Time (Minutes) (text input)
- SKUs* (dropdown menu)
- Department (dropdown menu)
- Document Type* (dropdown menu)
- Work Station (dropdown menu)

 At the bottom right, there are "Submit" and "Save" buttons.

Field Descriptions:

Description*: The required title of the document or operation. This becomes the official name displayed throughout the system.

Document Internal Code: If your organization uses its own document numbering or coding system, enter it here. This field is optional, as Routine automatically generates codes that align with major quality management systems such as ISO and AS9100.

Expiration Date: The date when this document is scheduled for review. This typically defaults to the timeframe defined in the application settings (commonly one year from creation).

Retention Years: Defines how long the document will remain active or archived within the system before final disposition.

Skills: Select any specific skills required to perform the operation (e.g., welding, painting, gluing). The list of skills is managed in the application settings and supports training matrix functionality.

Parts: Identify any parts required to complete the operation. This list can be managed manually in application settings or synced directly from your ERP system for live part data.

Training: Specify whether the operation allows for self-training or requires a designated trainer for completion.

Disposition: Defines what happens to the document once it is no longer in use. Common options include archiving, marking as obsolete, or destruction, depending on your organization's quality management system requirements.

Operator Count: The number of operators required to complete the operation.

Operator Skill Level: Indicates the level of experience or proficiency required to perform the operation successfully.

Operation Type: Designates whether the operation is common (performed on most jobs) or incremental (performed only on certain jobs or under specific conditions).

Operator Total Time (Minutes): The total amount of time required to complete the operation.

Operator Cycle Time (Minutes): A calculated field that divides the Operator Total Time by the Operator Count to determine each operator's individual cycle time.

Value Added Time (Minutes): The portion of time spent directly changing the form, fit, or function of the product.

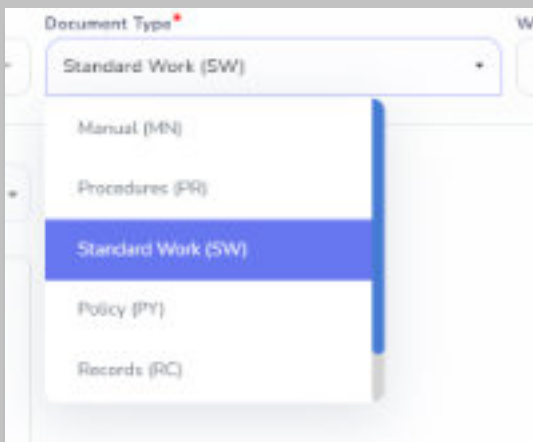
Other Actions Time (Minutes): The remaining time required to complete the operation that is not considered value-added.

Site*: The required site location where the document or operation is owned and performed.

Department: The department responsible for owning and maintaining the document or operation.

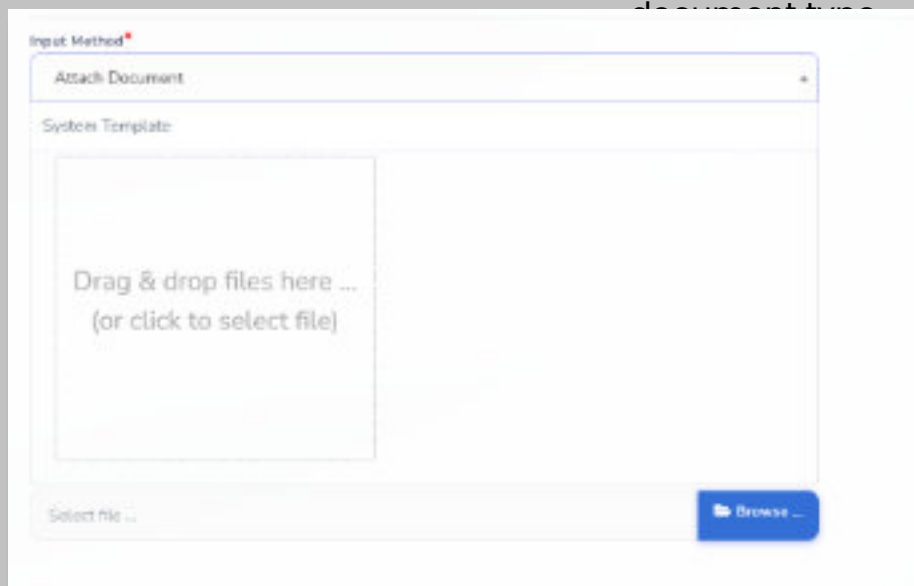
Document Type*: The required category of document being created (e.g., Policy, Manual, Standard Work Instruction). Different document types may activate different system templates.

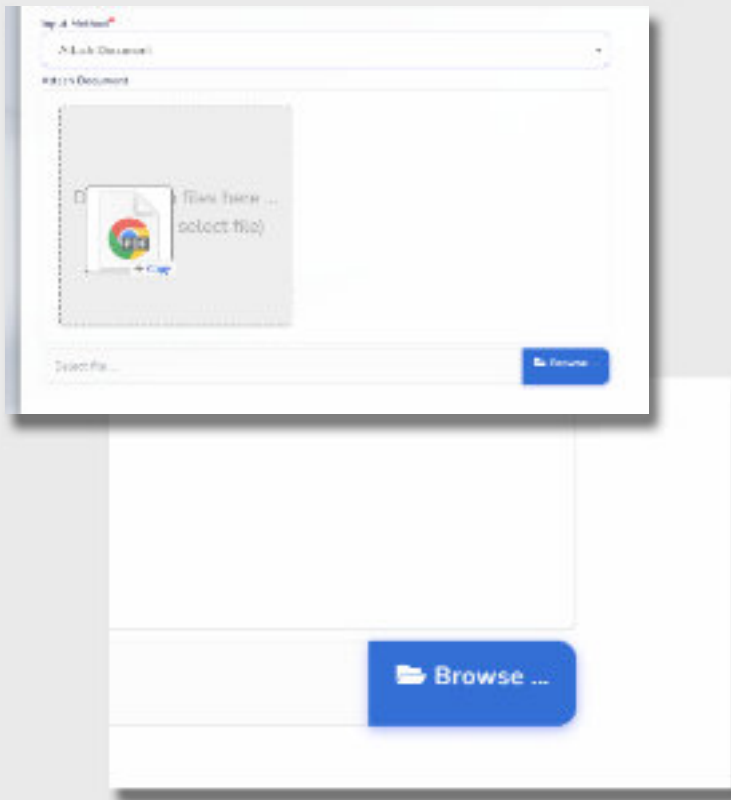
Work Station: The specific workstation within the department where the operation or document applies.



Once a Document Type is selected, the lower section of the Input Document screen will automatically load. This section determines how the document or operation will be created.

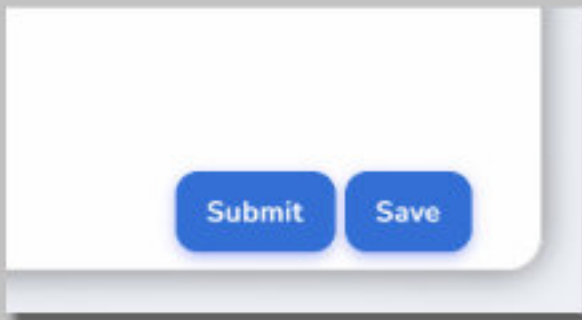
From here, users can choose to attach an existing file (such as a PDF, Excel, or PowerPoint document) or build the document directly within Routine using the system template associated with that document type.





Attaching A Document

- To attach an existing document, simply drag and drop the file into the upload box provided in the lower section of the screen.
- You may also click the **Browse** button to open a file dialog box and select the document manually from your computer.
- Once uploaded, the file will be linked to the operation and managed under **Routine's** document control system.

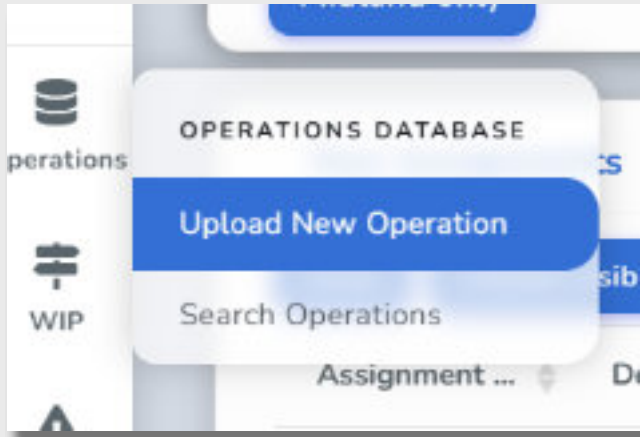


Saving and Submitting

- To save a document so you can return to edit it later, click **Save**.
- To submit a document into the approval process, click **Submit**.

CREATING DOCUMENTS WITH THE SYSTEM TEMPLATE

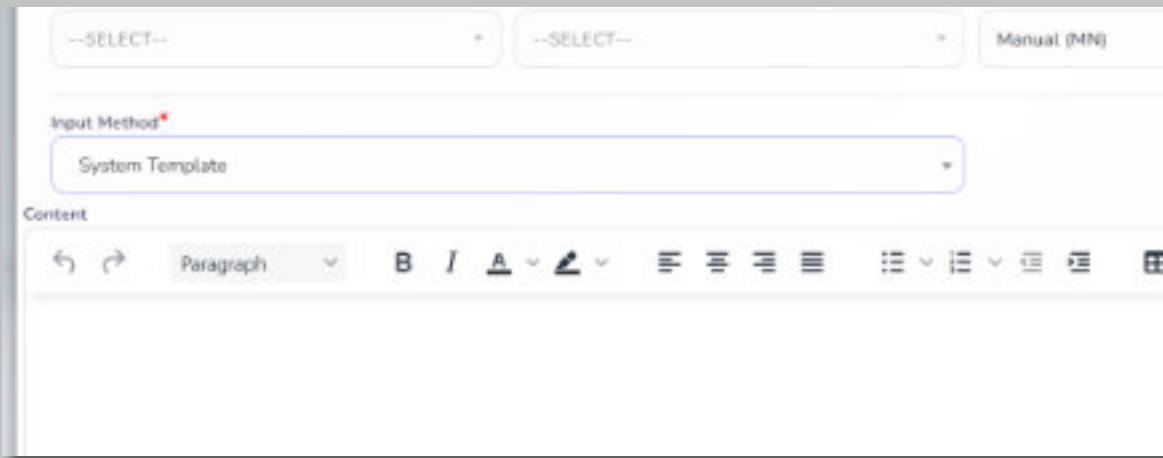
Instead of uploading an existing file, you can build the document directly within **Routine** using the system template associated with the selected document type. In the following section, we'll walk through how to build and configure a document using **Routine's** built-in templates.



Begin Creating a Document using the same instructions as above

1. Select **Upload New Operation**.
2. Fill out document information.

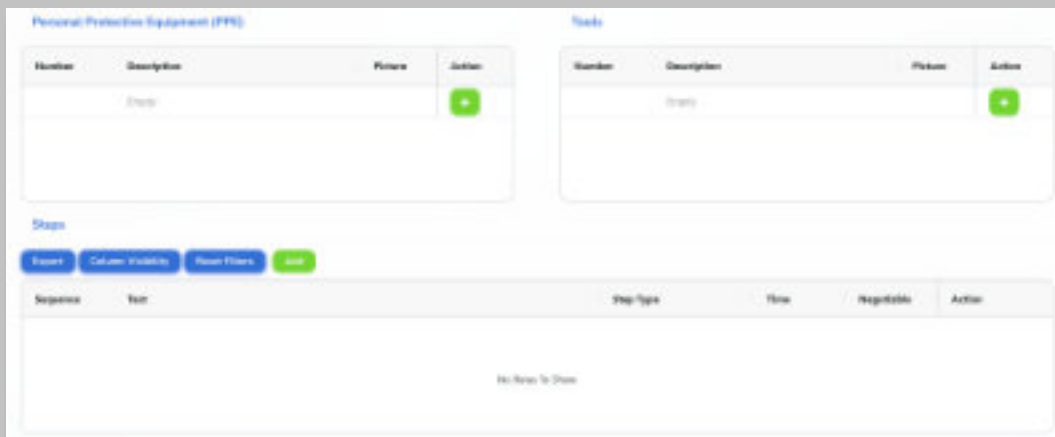
Once the **Input Method** drop down loads, after you select the document type, select **System Template**.



The

system template that appears will change depending on what document type is selected. For Manuals, Procedures, Policies, and Records, the template functions similarly to any traditional text editor.

For Standard Work documents, the template generates a few more tables for additional control and



Assigning Personal Protective Equipment (PPE)

Number	Description	Picture	Action
	Empty		

- Enter the name of the PPE in the description field.
- Click the green + button to save it to the list.
- You can also upload an image for reference, if desired.

Assigning Tools

Number	Description	Picture	Action
	Empty		

- Enter the name of the Tool in the description field.
- Click the green + button to save it to the list.
- You can also upload an image for reference, if desired.

Creating Steps

The **Step Table** defines the detailed sequence of work for the operation. To add a step, click the **Add** button located above the **Step Table**. This will open the **Add**

Sequence	Text	Step Type	Time	Negotiable	Action
No Rows To Show					

The screenshot shows the 'Add New Step' popup form. At the top is a 'Text' field. Below it are two tables: 'Personal Protective Equipment (PPE)' and 'Tools'. Each table has columns for 'Number', 'Description', and 'Action'. The 'PPE' table has one row with 'Empty' in the description and a green '+' icon in the action column. The 'Tools' table also has one row with 'Empty' in the description and a green '+' icon in the action column. Below the tables are several input fields: 'Step Sequence' (a dropdown with '1' selected), 'Step Type' (a dropdown with '--SELECT--' selected), 'Step Time (Minutes)' (a text input field), and three toggle switches labeled 'Negotiable', 'Prevent Process', and 'Last Version'. At the bottom is an 'Attach Pictures/Documents' section with a file upload area.

Below is a breakdown of the fields within the **Add New Step** popup:

Text: Enter the written instruction describing what should be performed during this step.

Personal Protective Equipment (PPE): Similar to the main **PPE** table, this table allows you to highlight specific PPE required for this individual step.

Tools: Similar to the main **Tools** table, this table allows you to highlight specific tools required for this individual step.

Step Sequence*: Required. Defines the order of the step within the overall operation.

Step Type*: Required. Use the dropdown to classify the step type (e.g., Value Added Action, Non-Value Added Action, Quality Check, etc.). This classification supports reporting, MES functionality, and Operator loading analysis.

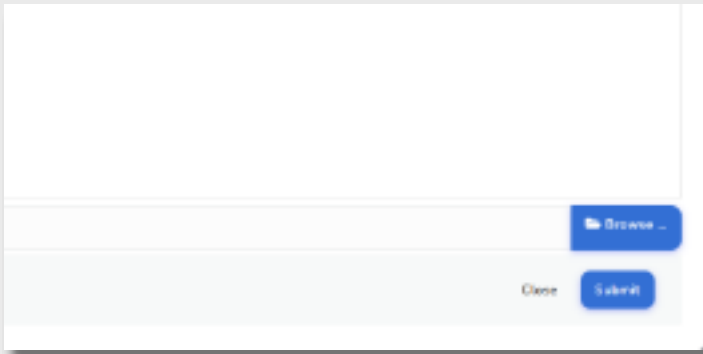
Step Time (Minutes): The amount of time required to complete this step.

Negotiable: A toggle that determines whether the step is optional or required within the operation.

Password Protection: When using the MES system, enabling this option requires the operator to enter their password before marking the step complete.

Lead Verification: When enabled within MES, this setting requires a designated lead to verify and sign off before the step can be completed.

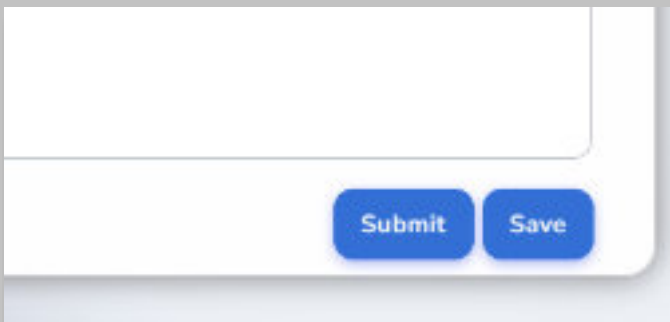
Attach Picture/Documents: Upload supporting materials for the step, such as images, videos, PDFs, or spreadsheets. Files can be dragged and dropped into the upload box or selected manually using the **Browse** button.



Once all required fields are completed, click **Submit** to create the step. After submitting, the popup will reload with blank fields, allowing you to begin entering the next step in the sequence.

Repeat this process for each step in the operation. After submitting the final step, click **Close**.

Submitting the Document for Approval



Once the template has been completed the next step is to submit it into the approval workflow.

Click **Submit** to send the document into the approval process.

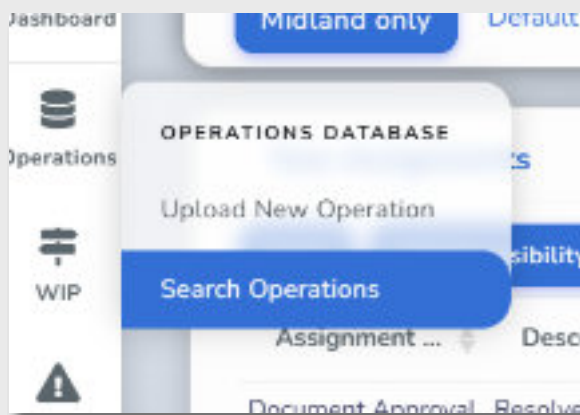
If the document is not yet complete and you would like to finish it later, click **Save**.

DOCUMENT ORGANIZATION

Operations in **Routine** are organized using a folder structure similar to Windows File Explorer. At the highest level, content is grouped by Site, which then breaks down into Departments, and further into Workstations. This structure allows documents and operations to be organized based on where the work occurs.

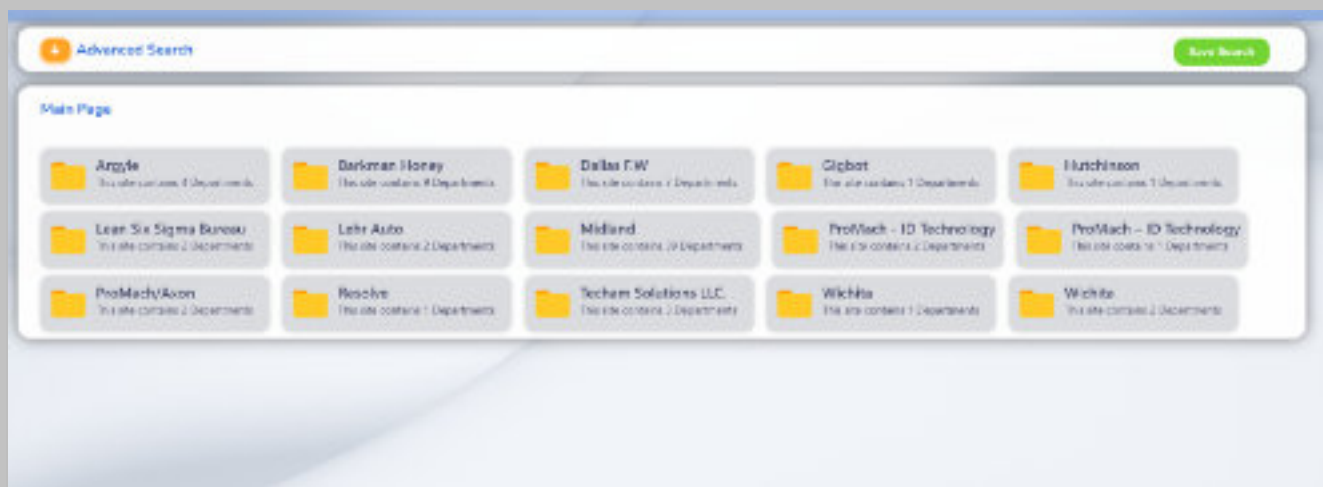
Documents can be assigned at any level within this hierarchy. Some documents may apply site-wide, such as policies or general procedures. Others may be specific to a department, while detailed standard work instructions are often tied directly to an individual workstation. This layered organization ensures users can quickly locate the documents relevant to their role and location.

SEARCHING OPERATIONS



- Hover over the **Operations** icon on the left hand side menu.
- Click **Search Operations** from the dropdown menu.
- This will open the **Document Database** main page.

- From here you will see all the **Sites** you have access to.



Code	Legacy Code	Description	Thumbnail	Creation Date	#	Action
CBC-CBC-SW-04/01		Installing shelves		04/10/2024	0	[Action icons]
Not Assigned		Installing shelves		05/01/2024	0	[Action icons]
CBC-CBC-MN-01/00		Policy Doc		12/03/2024	1	[Action icons]
CBC-CBC-SW-01/00		Test		05/03/2025	0	[Action icons]
CBC-CBC-SW-06/01		Creating a panel butter...		05/23/2025	0	[Action icons]
CBC-CBC-SW-06/01		Brewing coffee using a c...		05/23/2025	0	[Action icons]
CBC-CBC-PS-02/01		Test		05/30/2025	0	[Action icons]
CBC-CBC-SW-10/00		Test		06/04/2025	0	[Action icons]
CBC-CBC-SW-11/00		Creation of a new stand...		06/04/2025	0	[Action icons]

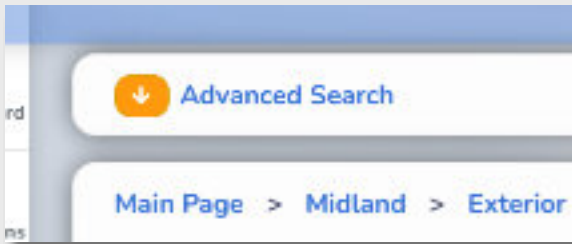
- Click on a **Department** to expand it and view it's Workstations and any

Code	Legacy Code	Description	Thumbnail	Creation Date	#	Action
CBC-CBC-22-SW-01/01		Department Safety Proc...		01/17/2004	02	[Action icons]
CBC-CBC-22-SW-04/00		Test the over legs		29/05/2005	00	[Action icons]
Not Assigned		Stuff		02/02/2005	01	[Action icons]

- Select a **Workstation** to view the operations and documents assigned to that location.

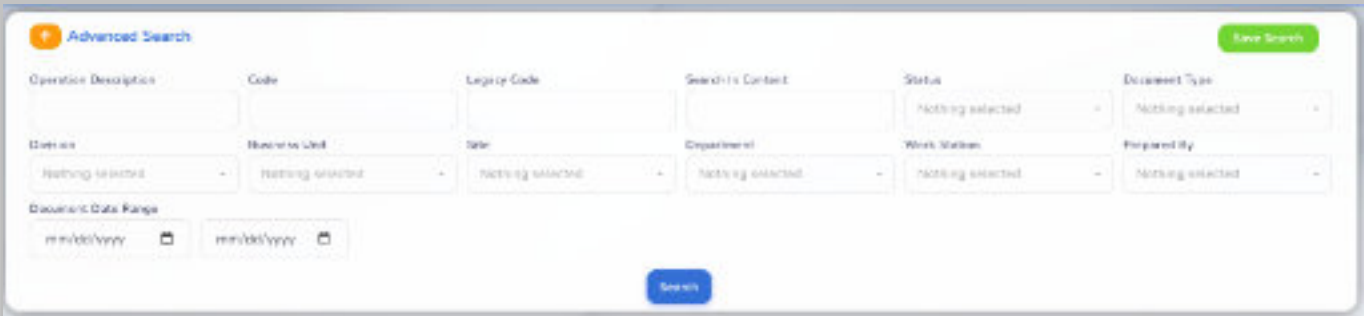
Code	Legacy Code	Description	Thumbnail	Creation Date	#	Action
CBC-CBC-22-06-SW-54/...		Installing side panel roo...		11/27/2024	0	[Action icons]
CBC-CBC-22-06-SW-52/...		Attach Document addi...		01/31/2024	0	[Action icons]
Not Assigned		Cut and install chain roa...		11/22/2025	1	[Action icons]
CBC-CBC-22-06-SW-46/...	22-332-03	Cut and install Drain Res...		12/03/2021	1	[Action icons]
CBC-CBC-22-06-SW-47/...	22-332-04	Sealall Washer Install		11/11/2021	1	[Action icons]
CBC-CBC-22-06-SW-46/...	22-332-05	Install Below Lift Door No...		11/10/2021	1	[Action icons]

Using Advanced Search



- Click the arrow button next to **Advanced Search** at the top of the **Document Database** screen.
- This will open the **Advanced Search** panel with searchable fields.

- Enter your desired search criteria using any combination of the available fields.



- The system will return a list of documents and operations that match your search parameters.

Code	Legacy Code	Description	Thumbnail	Creation Date	Action
CBC-CSC-PW-SW-12402		Prepare a cup of coffee		10/20/2025	[Icons]
Not Assigned		Install window on bus		05/10/2025	[Icons]
CBC-CSC-PW-SW-66401		Manufacturing a Peanut ...		01/01/2025	[Icons]
CBC-CSC-142-PS-01/01		SCP Technician Timekeep ...		12/12/2024	[Icons]
Not Assigned		Installing shelves		05/01/2024	[Icons]
Not Assigned		Cut and install drain hoses		11/22/2023	[Icons]
Not Assigned	39-110-23	Chevy 06L U71 V8 Gas U...		10/05/2022	[Icons]
CBC-CSC-15-20-SW-100...	15-1500-38	Care Certification		08/05/2021	[Icons]
CBC-CSC-34-04-SW-01...	40-46	New Hire Orientation		01/01/2021	[Icons]
CBC-CSC-34-04-SW-02...	34-220-01	Install Battery Disconnect		05/01/2021	[Icons]
CBC-CSC-34-01-SW-10...	34-220-02	Pop Battery Disconnect		05/01/2021	[Icons]
CBC-CSC-501-00-SW-51...	20-200-29	Lock Out/Tag-Out 688		05/01/2021	[Icons]
CBC-CSC-06-00-SW-0...	06-401	Salt Spray		05/07/2021	[Icons]

Document Table and Action Buttons

Search results are displayed in a table format within the Document Database. Each row represents a document or operation that matches your search criteria. Above the table, several action buttons you to manage and interact with selected documents.

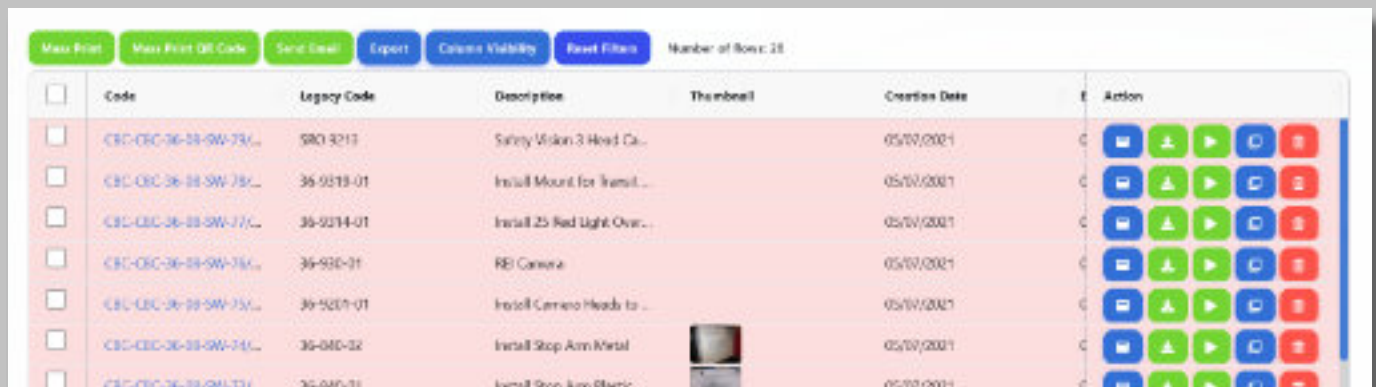
Below is a break down of these buttons:

Mass Print: Select documents by checking the boxes in their respective rows, then click **Mass Print** to open multiple documents in print preview mode. From there, documents can be printed or exported as a PDF.


Mass Print QR Code: Generate a printable sheet of QR codes for the selected documents. Each QR code links directly to its corresponding document, making it easy to post at workstations for quick access.

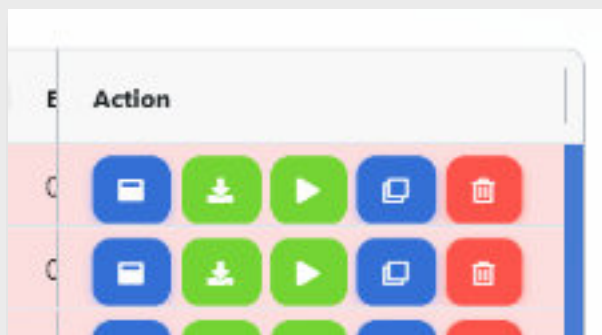
Send Email: Opens a popup window that allows you to send a link to the selected documents to users within the system.

Column Visibility: Customize the table view by toggling specific columns on or off.



The screenshot shows a table with columns: Code, Legacy Code, Description, Thumbnail, Creation Date, and Action. Above the table are buttons for Mass Print, Mass Print QR Code, Send Email, Export, Column Visibility, and Row Filter. The table contains several rows of document information, each with a checkbox and a set of action buttons in the Action column.

	Code	Legacy Code	Description	Thumbnail	Creation Date	Action
<input type="checkbox"/>	CBC-CBC-36-33-SW-73...	36-9213	Safety Vision 3 Head Ca...		05/07/2021	[Action Buttons]
<input type="checkbox"/>	CBC-CBC-36-33-SW-73...	36-9218-01	Install Mount for Transi...		05/07/2021	[Action Buttons]
<input type="checkbox"/>	CBC-CBC-36-33-SW-77...	36-9214-01	Install 25 Red Light Over...		05/07/2021	[Action Buttons]
<input type="checkbox"/>	CBC-CBC-36-33-SW-73...	36-920-01	REI Camera		05/07/2021	[Action Buttons]
<input type="checkbox"/>	CBC-CBC-36-33-SW-73...	36-9207-01	Install Camera Heads fo...		05/07/2021	[Action Buttons]
<input type="checkbox"/>	CBC-CBC-36-33-SW-74...	36-940-02	Install Stop Arm Metal		05/07/2021	[Action Buttons]
<input type="checkbox"/>	CBC-CBC-36-33-SW-74...	36-940-01	Install Stop Arm Plastic		05/07/2021	[Action Buttons]



Row Actions

In addition to the action buttons above the table, each document row includes individual action buttons.



Open: Opens the selected document so you can view its contents.



Download: Opens the print preview screen, where the document can be printed or exported as a PDF.



Step-by-Step: Opens standard work documents in the **Step-by-Step** view, which is designed for guided execution of work instructions.



Clone: Creates a new document based on a copy of the selected document, allowing you to reuse content while making modifications.



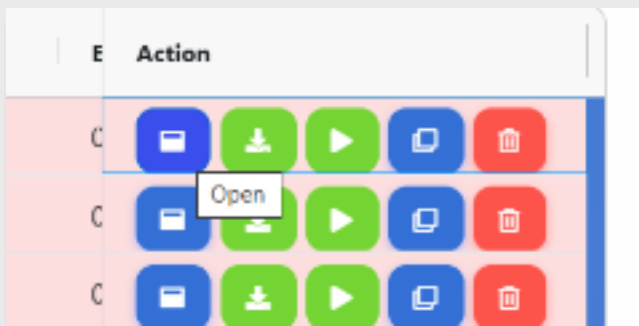
Delete: Permanently deletes the selected document from the system.

DOCUMENT REVISION PROCESS

Maintaining accurate and up-to-date standard work is a critical part of effective document control. . In this section, we'll walk through the three key steps of revising a document: checking out a document for editing, making updates and submitting the revision, and finally reviewing and approving the updated version.

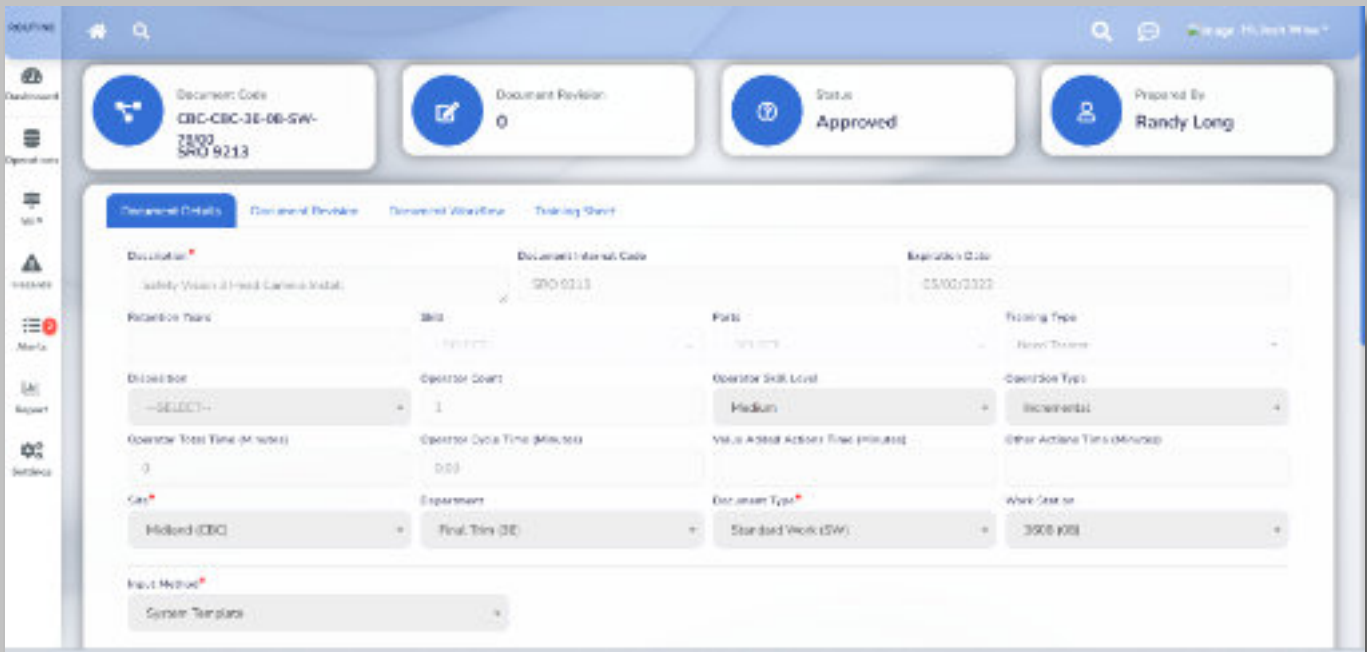
CHECKING OUT A DOCUMENT

The first step in revising a document is checking it out of the system. Checking out a document allows you to make changes while preserving the currently approved version.

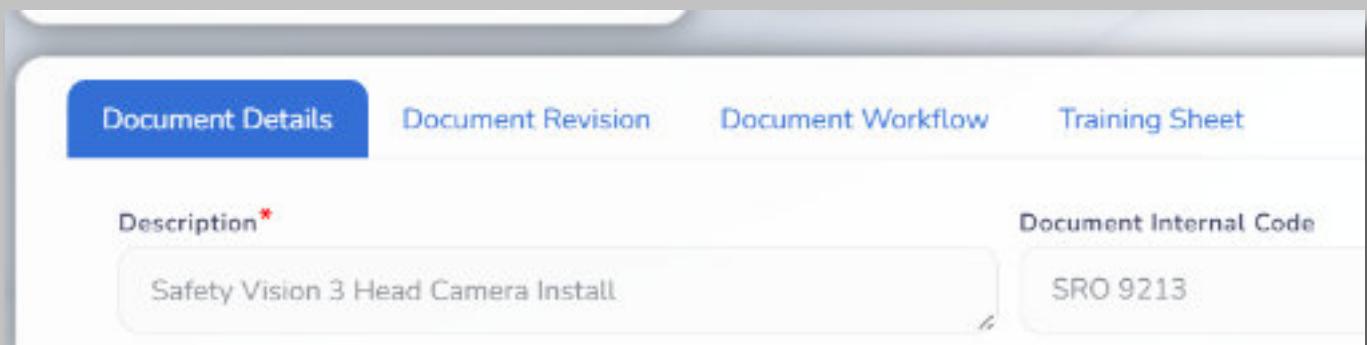


- Locate the document in the **Document Database**. (Refer to the previous section for instructions on navigating the database.)
- Open the document by either; Clicking the document code, or Clicking the **Open** button in the document table.

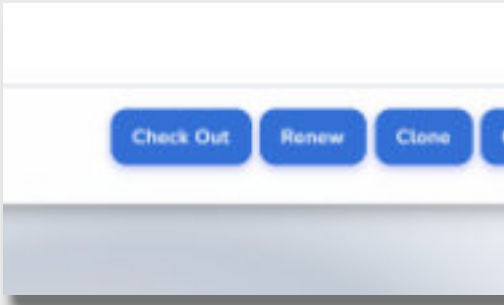
- This will open the **Document Management** screen in a new browser tab.



- The **Document Management** screen is organized into four tabs

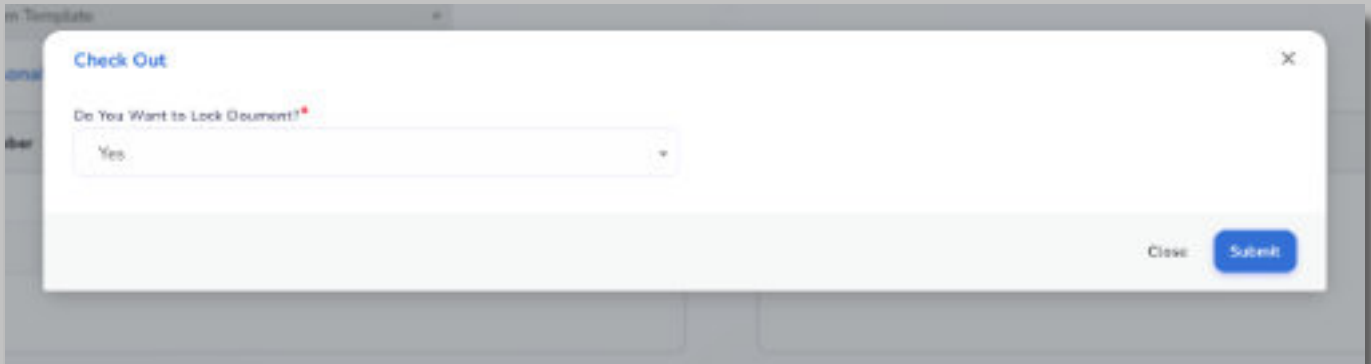


- **Document Details:** Displays the document's core information. This includes the same fields completed during the creation (description, site, department, document type, etc.).
- **Document Revision:** Shows the document's revision history. This is also where documents are approved or denied during the workflow process.
- **Document Workflow:** Displays the approval workflow associated with the document
- **Training Sheet:** Shows the document's training records. From here, you can update employee training status and view the corresponding training matrix.



- To begin making changes, click the **Check Out** button at the bottom of the **Document Details** tab.

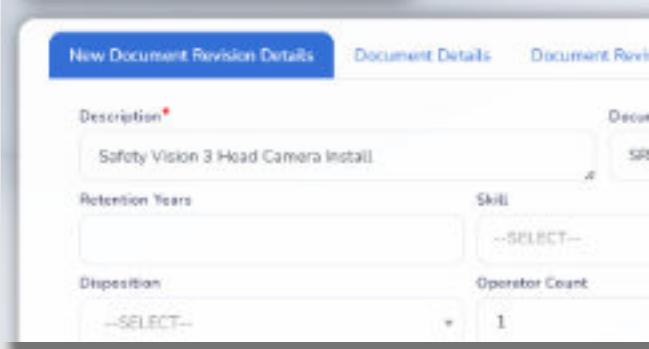
- A popup window will appear asking whether you would like to lock the document.
- To lock the document for editing:
 - Select **Yes** from the dropdown menu.
 - Click **Submit**.
- Once submitted, the document will be unlocked for editing and placed into



REVISING A DOCUMENT

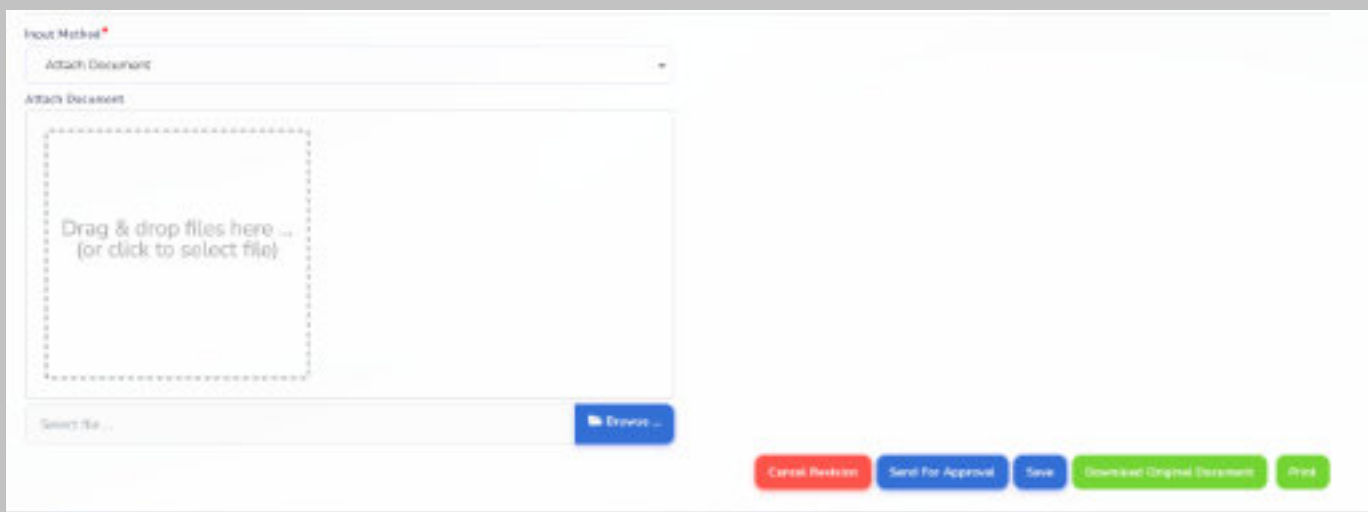
Once a document has been checked out, a new tab labeled New Revision Details will appear in the Document Management screen. This tab begins as a duplicate of the existing document details, but all fields are now editable.

From here, you can update the document information as needed. For a full explanation of each field and its purpose, refer to the Creating Documents and Operations section earlier in this guide.

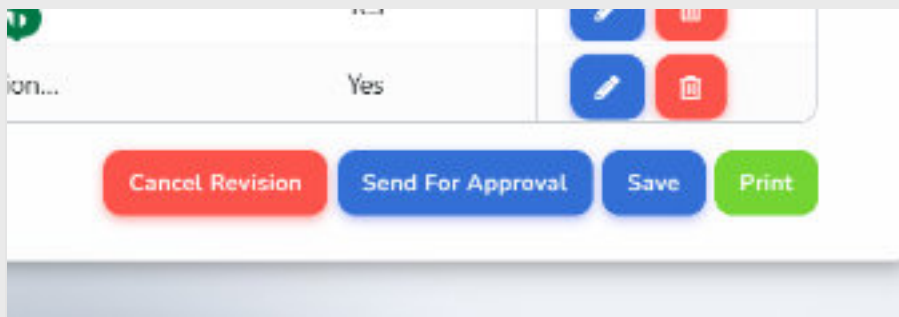


- Begin editing the document within the **New Document Revision Details** tab.
- If you need to reference the previous approved version, click the **Document Details** tab to compare the two versions.

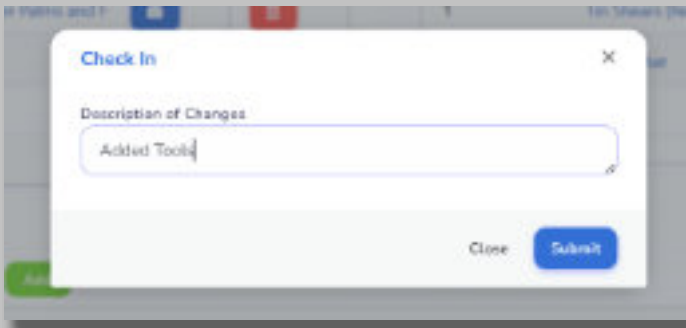
- If the document was originally created using the **Attach File** method:
 - Download the existing file.
 - Make the necessary edits.
 - Reupload the updated file as part of the revision



- At the bottom of the screen, you will find the following action buttons:



- **Cancel Revision:** Cancels the revision and exits the edit mode without saving changes
- **Send For Approval:** Submits the revised document into the approval workflow.
- **Save:** Saves your changes without sending the document for approval.
- **Print:** Opens the print preview screen, where the document can be printed or downloaded as a PDF.

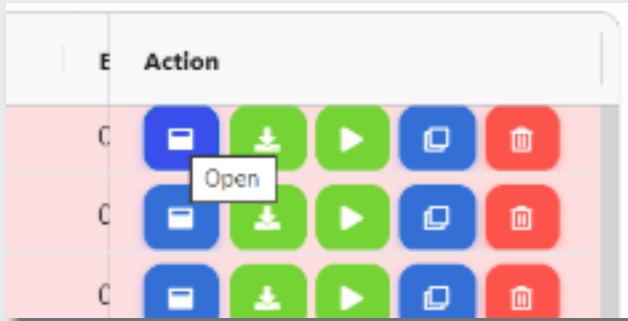


- After clicking **Send for Approval**, a popup will appear.
- In this popup, enter a description of the changes made to the document.
- These changes will be recorded in the **Document Revision** tab and will be visible in the revision history table.
- Once complete, click **Submit** to send the document into the approval workflow.

APPROVING A DOCUMENT

Once a document has been submitted for approval, it enters the defined workflow for review. Designated approvers will evaluate the revision to ensure the changes are accurate, complete, and aligned with organizational standards.

During this stage, the document can either be approved and published as the new active version or denied and returned for further revision.



- Locate the document that requires approval in the **Document Database**. (Refer to earlier sections for instructions on navigating the database.)
- Open the document.

The image shows a web form titled 'New Document Revision Details'. It has three tabs: 'New Document Revision Details' (selected), 'Document Details', and 'Document Revision'. The form contains several input fields and dropdown menus:

- Description:** A text input field containing 'End Cap prep'.
- Retention Years:** A dropdown menu with '5&L' selected.
- Disposition:** A dropdown menu with '--SELECT--' selected.
- Operator Count:** A text input field containing '1'.
- Operator Total Time (Minutes):** A text input field containing '3'.
- Operator Cycle Time (Minutes):** A text input field containing '300'.

Reviewing the proposed changes

- Click the **New Document Revision Details** tab.
- Compare it with the **Document Details** tab to review the differences between the proposed revision and the currently approved version.

Approving Document Changes

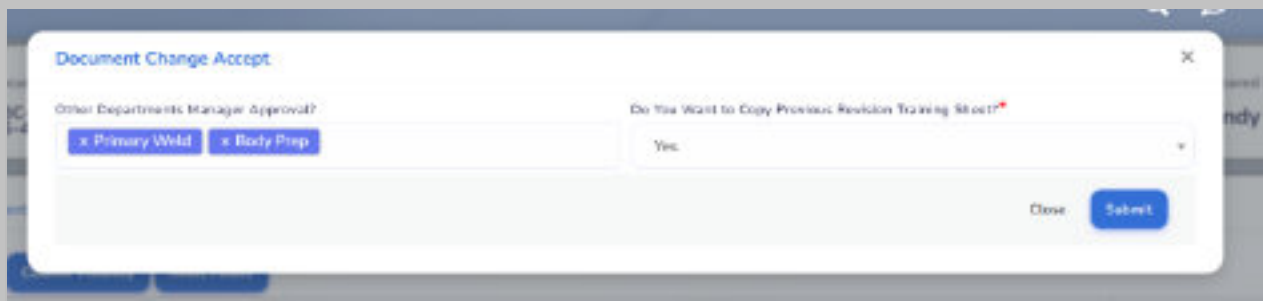
- Click the **Document Revision** tab.
- In the revision table, the most recent revision will be highlighted.
- To approve the revision, click the **Approve** button.

The image shows a table with a header row and two data rows. The table has columns for Revision, Date, Description, Submitted By, Decision Made By, Status, and Action. The first row is highlighted in orange and the second row is highlighted in green.

Revision	Date	Description	Submitted By	Decision Made By	Status	Action
Revision 11	02/22/2020	Added tools	Josh Wize		Submitted for Approval	✓ ✗
Revision 12	05/10/2021	Wize Upload Document	Randy Long	Randy Long	Approved	

Accept Document Changes Popup

- The popup contains two fields:
 - **Other Managers Document Approval:** If additional managers must approve the document, select the appropriate departments here. Managers of those departments will be notified via email that the document requires their approval.
 - **Do You Want to Copy Previous Revision Training Sheet?:** Select **Yes** to copy the previous revision's training data into the new revision. Select **No** to clear the training data. If cleared, training records will need to be re-entered for this revision.
- Click **Submit** to finalize the approval.

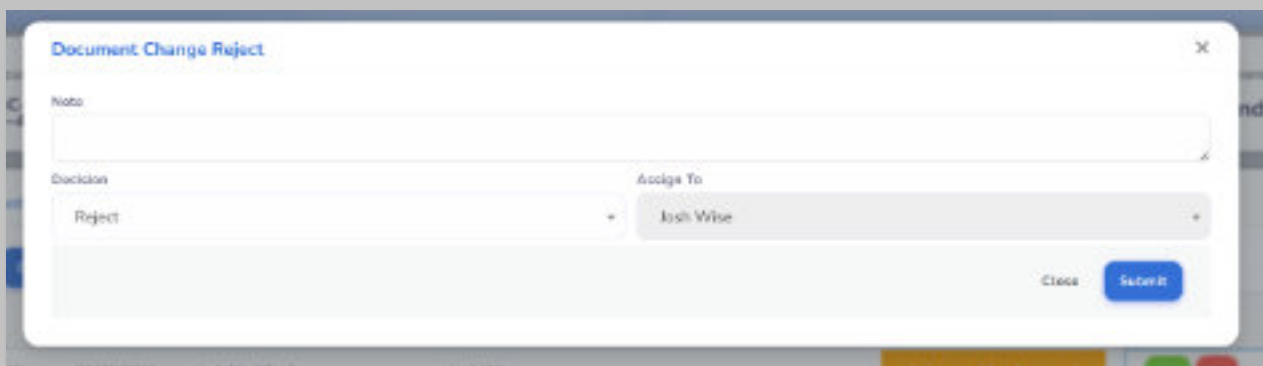


Status	Action
Submitted for Approval	<input type="checkbox"/> <input checked="" type="checkbox"/>
Approved	<input type="checkbox"/> <input checked="" type="checkbox"/>

Rejecting a Document Revision

- In the **Document Revision** tab, locate the highlighted revision awaiting approval.
- Click the **Reject** button. This will open the **Reject Document Change** popup.

Reject Document Change Popup

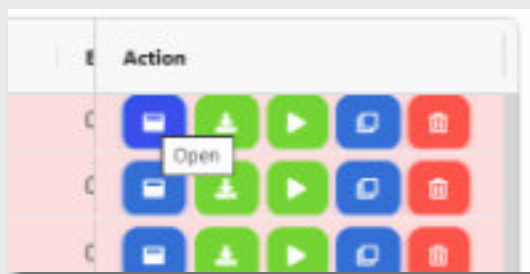


The popup contains three fields:

- **Note:** Enter any comments or feedback for the document author. These notes help clarify why the revision is being rejected or what changes are required.
- **Decision:** Select one of the following options
 - **Reject** – Cancels the revision and checks the document back in. No changes are published.
 - **Submit for Correction** – send the revision back for updates and notifies the person selected in the **Assign To** dropdown. This field defaults to the revision's author.
- **Assign To:** Select the user responsible for making the corrections. This defaults to the document author but can be reassigned if needed.
- Click **Submit** to finalize the rejection or send the document back for correction.

TRAINING SHEETS

Each document in **Routine** includes a **Training Sheet** that records which employees have been trained on that document or operation. Employees can be assigned training for any document in the system, allowing training records to be maintained in a centralized location. The data captured in these training sheets feeds directly into the **Training Matrix**, providing a structured view of training status across operations and employees.



Accessing the Training Sheet

- Locate and open the document whose training sheet you want to view or edit. (Refer to earlier sections for instructions on navigating the Document Database.)



- In the **Document Management** screen select the **Training Sheet** tab.

- The training data is displayed in a table format.
- To view historical training data, select different document revisions from the list

The screenshot shows a web interface for training data. At the top, there is a dropdown menu for 'Trainer' with 'Monty Powers' selected, and buttons for 'Update' and 'Print Department Training Matrix'. Below this is a list of document revisions from Revision 9 to Revision 16. To the right of the list are buttons for 'Export', 'Columns Visibility', 'Reset Filters', 'Add Multiple Trainers', and 'Add By Department'. The main table displays training records with columns for Employee Name, Training Date, Training Expiration Date, Skill Level, Trainer, and Action.

Employee Name	Training Date	Training Expiration Date	Skill Level	Trainer	Action
Daniel Degarmo	07/21/2021	Empty	Expert	No	[Delete]
Clinton Thompson	07/21/2021	Empty	Expert	No	[Delete]
Monty Powers	07/21/2021	Empty	Expert	No	[Delete]
Austin Sage	07/21/2021	Empty	Expert	No	[Delete]
Moe Eli	02/16/2024	05/07/2024	High Competence	No	[Delete]
Hessam Wali	12/09/2024	12/09/2025	Expert	No	[Delete]
Empty	02/16/2026	Empty	Empty	Empty	[Add]

Training Table Fields

Each row in the table represents one employee's training record for that document.

- **Employee Name:** The employee assigned to the record.
- **Training Date:** The date the employee was trained to their current skill level.
- **Training Expiration Date:** The date the employee's training expires.
- **Skill Level:** The employee's current training level for this document.
- **Trainer:** Indicates whether the employee is considered a trainer.
- **Action:** Contains the delete button for removing the record.

This is a close-up view of the training table from the previous screenshot. It shows the table structure and the first six rows of data.

Employee Name	Training Date	Training Expiration Date	Skill Level	Trainer	Action
Daniel Degarmo	07/21/2021	Empty	Expert	No	[Delete]
Clinton Thompson	07/21/2021	Empty	Expert	No	[Delete]
Monty Powers	07/21/2021	Empty	Expert	No	[Delete]
Austin Sage	07/21/2021	Empty	Expert	No	[Delete]
Moe Eli	02/16/2024	05/07/2024	High Competence	No	[Delete]
Hessam Wali	12/09/2024	12/09/2025	Expert	No	[Delete]

Training Date *	Training Expiration Date *	Skill Level *
07/21/2021	Empty	
07/21/2021	Empty	
07/21/2021	Empty	
07/21/2021	Empty	
02/16/2024	09/07/2024	
12/09/2024	12/09/2025	

Editing Records



To edit an existing record:

- Click directly into the field you wish to update
- Make the necessary changes.

Adding Records

To add a new record:

- Scroll to the bottom of the table.
- Begin filling out a new row.
- Click the green "+" button to add the record.



Hessam Vali	12/09/2024	12/09/2025	Expert	No	
Empty	02/28/2026	Empty	Empty	Empty	

Buttons as the Top of the Training Sheet Tab

- **Trainer (Dropdown):** Sets the trainer used when selecting **Add Multiple Trainees** or **Add By Department**.
- **Update:** Updates the Trainer dropdown selection.
- **Print Department Training Matrix:** Opens the print preview for the department-wide training matrix associated with this document.

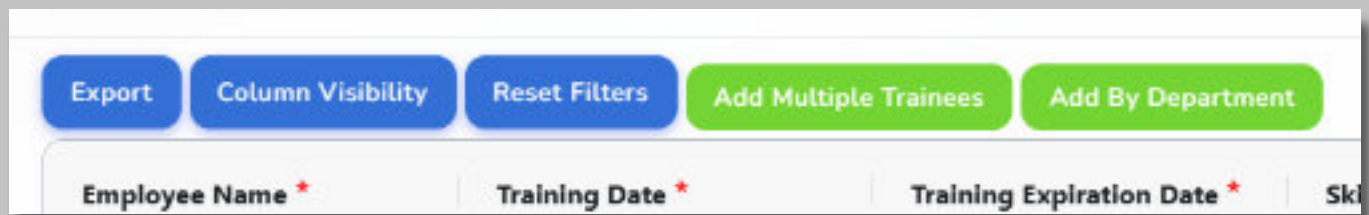
Trainer *

Monty Powers ▼

Buttons Above the Training Table

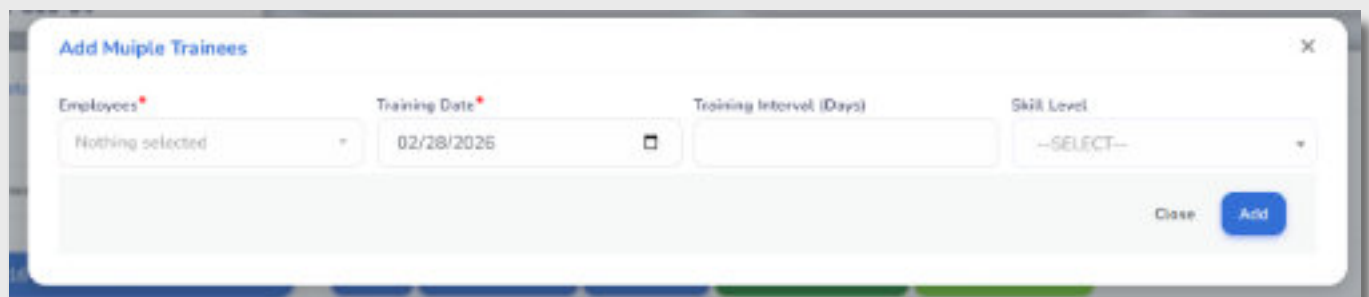
- **Export:** Exports the training table as a spreadsheet.
- **Column Visibility:** Opens a popup allowing you to toggle columns on or off.
- **Reset Filters:** Clears any filters applied to the table.
- **Add Multiple Trainees:** Opens a popup allowing multiple employees to be added to the training sheet at one time.
- **Add By Department:** Adds all employees from a selected department to the



Add Multiple Trainees Popup

Complete the following fields:

- **Employees:** Select all employees who need to be added.
- **Training Date:** Defaults to today's date, but can be adjusted.
- **Training Interval:** Defines how long the training is valid and calculates the expiration date.
- **Skill Level:** The level the selected employees are being trained to.



cell shows the employee's current skill level for that operation, based on the information recorded in the Training Sheets.

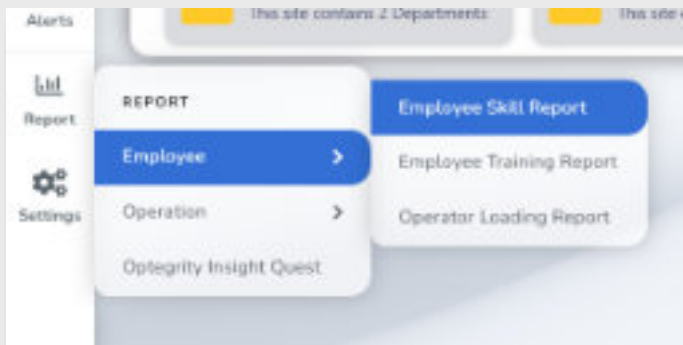
This format provides a structured view of workforce capacity, allowing users to quickly identify training gaps, cross-training coverage, and areas where additional development may be needed.

REPORTING

In this section, we will review several of Routine's most commonly used reports. These reports provide structured visibility into employee training, skill levels, and operational workload data.

EMPLOYEE SKILL REPORT

The Employee Skill Report provides a structured view of employee skill levels across defined skill categories. In the application settings, organizations can create and manage skills such as welding, painting, assembly, or any other capability relevant to their operations. Within this report, managers can assign and update employee skill levels for each defined skill and generate a matrix-style view of workforce capability. This makes it easier to understand overall skill coverage and identify areas where additional training or development may be needed.



Accessing the Employee Skill Report

- Hover over **Report** in the left-hand side menu.
- Select **Employee** from the dropdown.
- Click **Employee Skill Report**.

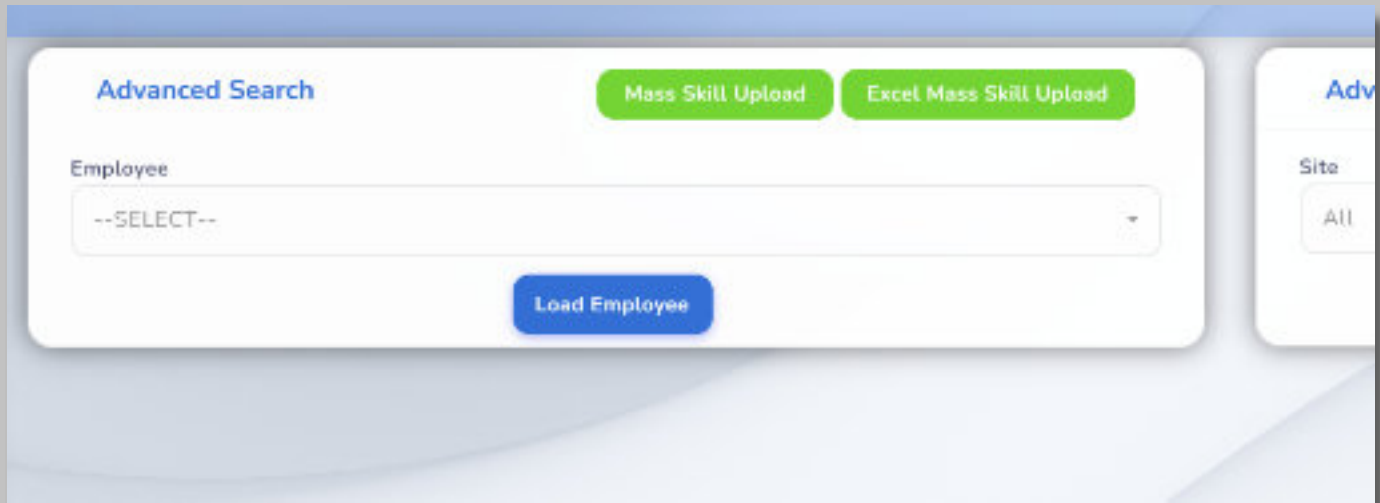
This will open the Employee Skill Report screen.

Loading an Individual Employee

There are two search areas at the top of the screen. The first allows you to load and update an individual employee's skill records.

- Select the employee's name from the dropdown menu.
- Click **Load Employee**.

This will open the **Employee Skill Table**.



Advanced Search

Mass Skill Upload Excel Mass Skill Upload

Employee

--SELECT--

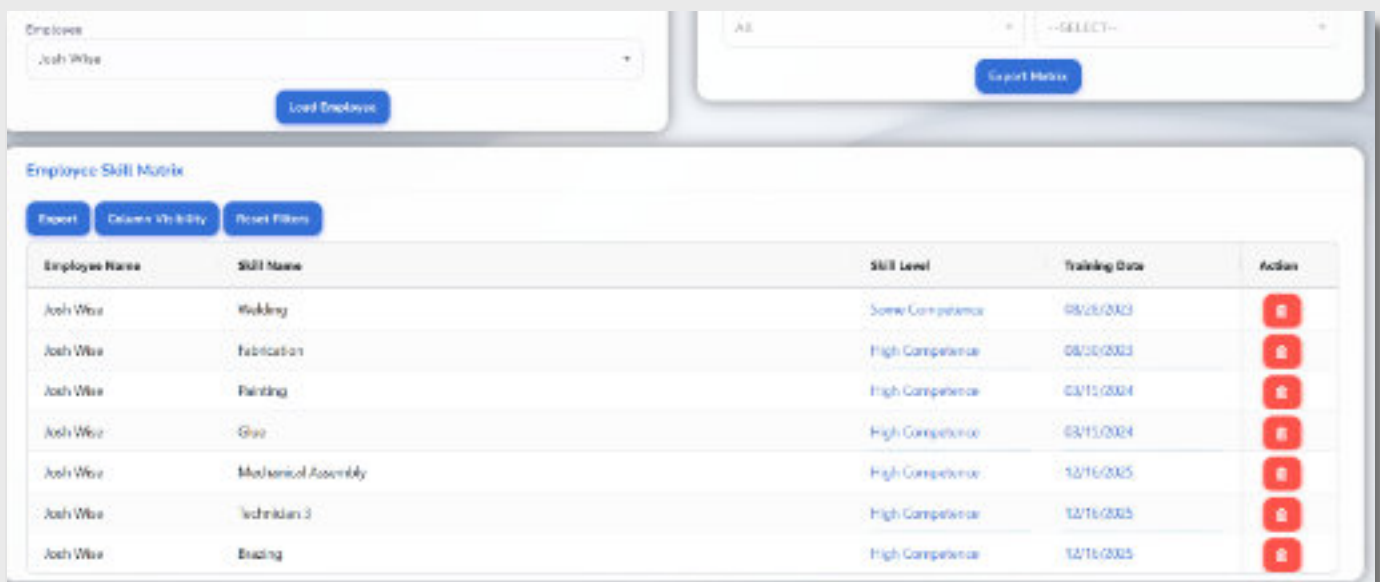
Load Employee

Site

All

Employee Skill Table

Each row in the table represents a skill assigned to that employee.

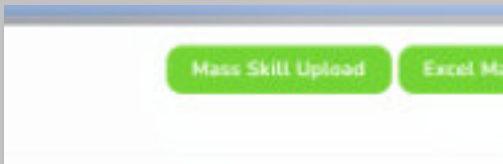


Employee Skill Matrix

Export Clear All Filters Reset Filters

Employee Name	Skill Name	Skill Level	Training Date	Action
Josh Wise	Welding	Some Competence	08/28/2023	
Josh Wise	Fabrication	High Competence	08/30/2023	
Josh Wise	Painting	High Competence	03/15/2024	
Josh Wise	Glue	High Competence	03/15/2024	
Josh Wise	Mechanical Assembly	High Competence	10/16/2025	
Josh Wise	Technician 3	High Competence	12/16/2025	
Josh Wise	Bending	High Competence	12/16/2025	

- **Skill Level:** Click the field to update the employee's proficiency level.
- **Training Date:** Click to modify the date the skill was assigned or updated.
- **Action Column:** Click the trashcan icon to delete a skill record.



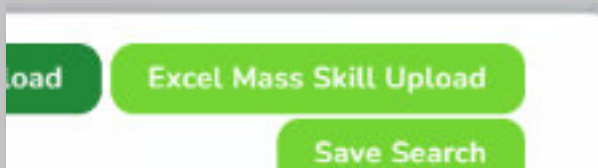
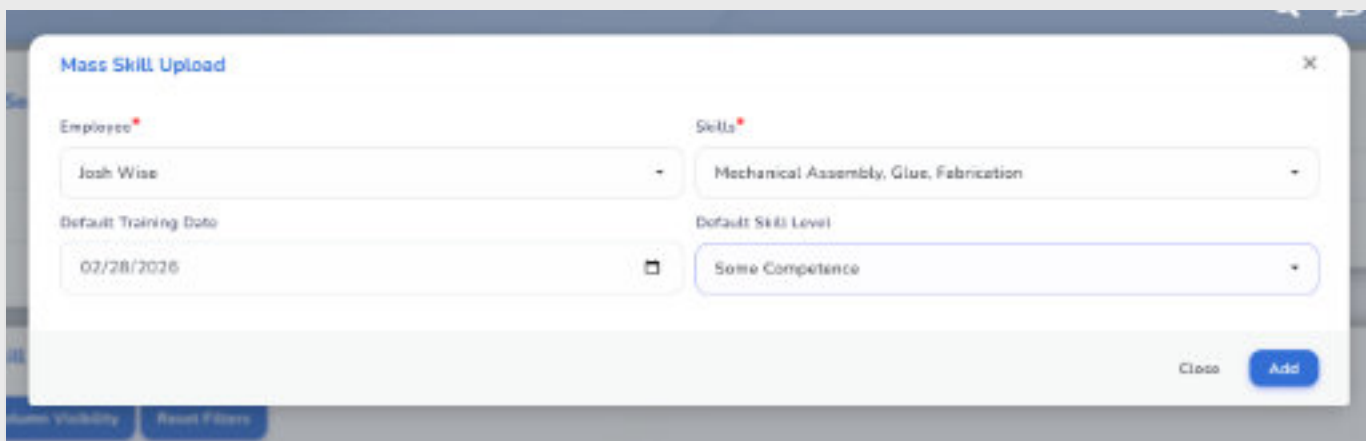
Adding Skills (Mass Skill Upload)

- Click the **Mass Skill Upload** button.

In the popup:

- Select the **Employee** from the dropdown.
- Select the **Skill(s)** from the Skills dropdown.
- Enter the **Training Date**.
- Select the **Skill Level**.

Click **Add** to assign the skill(s).

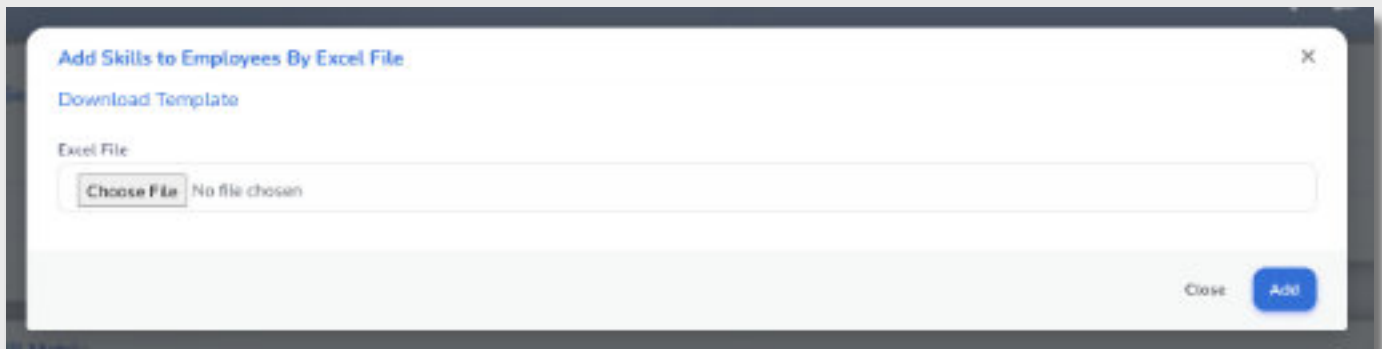


Adding Skills via Excel Upload

- Click **Excel Mass Skill Upload**.

This will open the **Add Skills to Employees By Excel File** popup.

- Download the provided template.
- Fill out the template with the appropriate employee and skill information.
- Save the file and reupload it into the system.



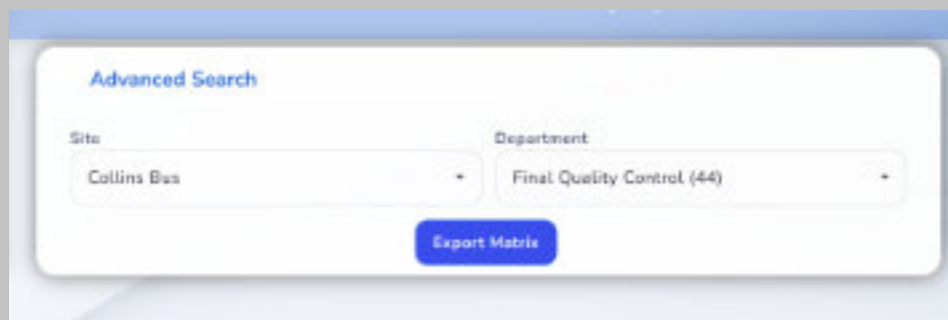
Exporting a Department Skills Matrix

The second search area at the top of the Employee Skill Report screen allows you to generate a department-level skills matrix.

- Select the **Manufacturing Site** from the first dropdown menu.
- Select the **Department** whose skills matrix you would like to view.
- Click **Export Matrix**.

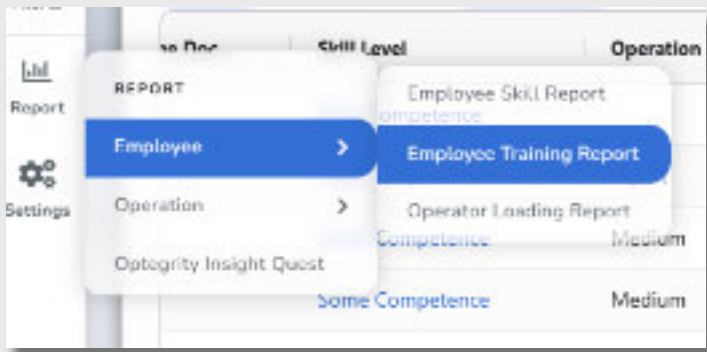
This will generate a matrix-style report displaying employees on one axis and defined skill on the other.

From the matrix preview screen, the report can be printed or downloaded as a PDF.



EMPLOYEE TRAINING REPORT

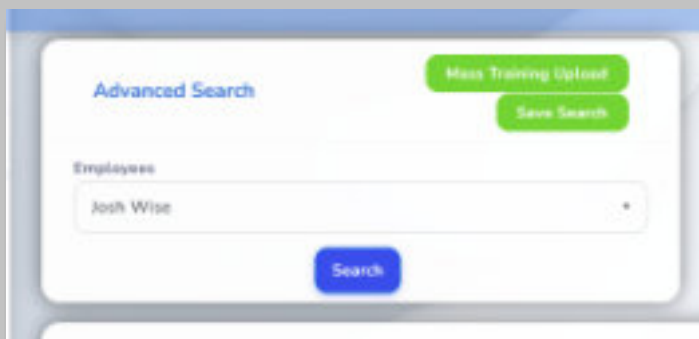
The Employee Training Report provides a matrix-style view of training data, organized from the employee perspective. While the Training Matrix discussed earlier focuses on operations and the employees assigned to them, this report centers on individual employees and displays the documents or operations they are trained on. It offers a structured way to review training status, coverage, and expiration dates across the workforce.



Accessing the Employee Training Records

- Hover over **Report** in the left-hand side menu.
- Select **Employee** from the dropdown.
- Click **Employee Training Report**.

This will open the Employee Training Report Screen.



Loading an Employee's Training Records

At the top of the screen are two search areas. The first allows you to load training records for an individual employee.

- Select an **Employee** from the dropdown menu.
- Click **Search**.

This will populate the **Employee Training** table with all operations/ documents the selected employee has been trained on.

Employee Training Table Fields

Employee Name: The employee tied to the training record.

Document Description: The name/title of the document or operation.

Document Code: The document's system code.

Home / Not Home Document: Indicates whether the document belongs to the employee's home department.

Skill Level: The employee's training level for the document.






Operation Skill Level: The skill level required to perform the operation.


Cycle Time: The operation's cycle time value.

Training Date: The date the employee received training for the document/operation.

Employee Training Matrix

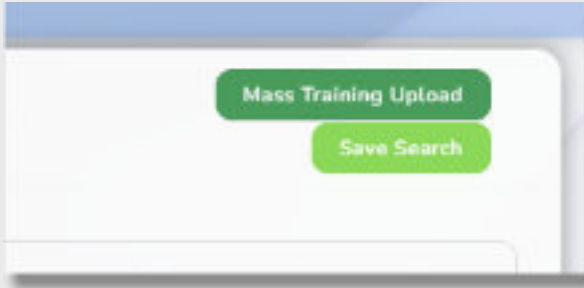
Export Column Visibility Reset Filters

Employee ...	Document Description	Document Code	Home Not Hom...	Skill Level	Action
Josh Wise	Test	CBC-CBC-15-04-SW-108...	Not Home	High Competence	
Josh Wise	Water Heater Assembly	CBC-CBC-38-10-SW-109...	Not Home	High Competence	
Josh Wise	fasten the bolt	CBC-CBC-48-00-SW-97/...	Not Home	Some Competence	
Josh Wise	AP ACH Disbursements	CBC-CBC-810-810-SW-2...	Not Home	Some Competence	
Josh Wise	Test	BH-BH-PK-PK-SW-02/00	Not Home	High Competence	

Home Not Hom...	Skill Level	Action
Not Home	High Competence	
Not Home	High Competence	
Not Home	Low Competence	
Not Home	Some Competence	
Not Home	High Competence	
Not Home	Expert	
Not Home	Training Required	

Editing Training Records

- To edit an item in the table, click directly into the editable field and make the necessary changes.



Adding Training Records

Training records can be added using the **Mass Training Upload** feature.

- Click the **Mass Training Upload** button.
- This will open the **Mass Training Upload** popup.

Mass Training Upload Fields

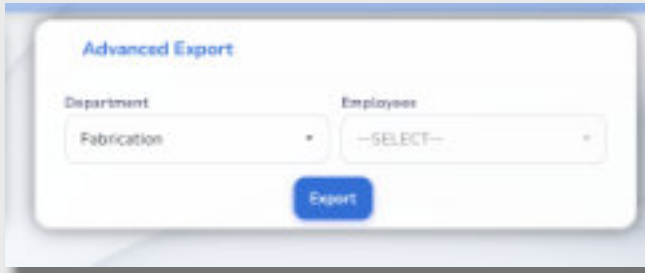
To add training records, complete the following fields:

- **Employee:** Select the employee who is receiving the training.
- **Department:** Select the department to filter the list of available operations.
- **Operations:** Choose one or more operations from the dropdown list.
- **Default Training Date:** Enter the date the training occurred.
- **Training Interval (Days):** Enter how many days the training is valid before it expires.
- **Default Skill Level:** Select the skill level the employee will receive for the selected operations.
- Click **Add** to create the training records

A screenshot of the 'Mass Training Upload' popup form. The form has a white background and a blue header with the title 'Mass Training Upload' and a close button (X). The form contains six fields arranged in two rows of three. The first row includes 'Employee' (dropdown menu with '--SELECT--'), 'Department' (dropdown menu with 'All'), and 'Operations' (dropdown menu with 'Select ...'). The second row includes 'Default Training Date' (text input with '02/28/2026' and a calendar icon), 'Training Interval (Days)' (text input), and 'Default Skill Level' (dropdown menu with 'Empty'). At the bottom right of the form are 'Close' and 'Add' buttons. Below the form, there are two blue buttons: 'Column Visibility' and 'Reset Filters'.

Exporting Training Records by Department or Employee

The second search area at the top of the Employee Training Report screen allows you to export training data based on selected filters.

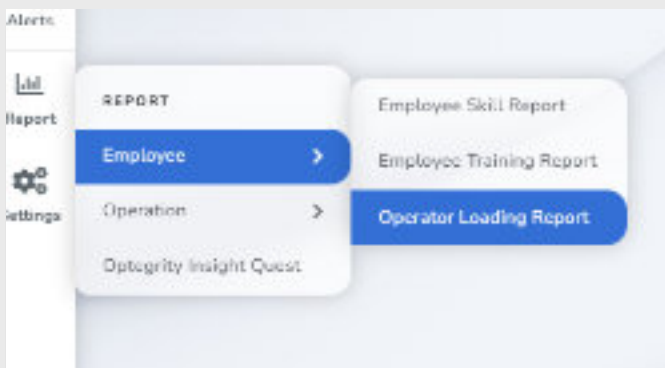


- Select a **Department** from the first dropdown box.
- Select one or more **Employees** from the second dropdown box.
- Click **Export**.

This will generate an Excel spreadsheet containing the training records for the selected department and/or employees.

EMPLOYEE TRAINING REPORT

The Operator Loading Chart allows users to assign operations to specific operators while monitoring total workload against takt time. This report provides a visual breakdown of each operator's assigned work time, helping ensure workloads are balanced and production flow remains stable.



Accessing the Operator Loading Report

- Hover over **Reports** in the left-hand side menu.
- Select **Employee** from the dropdown menu.
- Click **Operator Loading Report** screen.

Creating an Operator Loading Chart

Before generating the chart, complete the following fields:

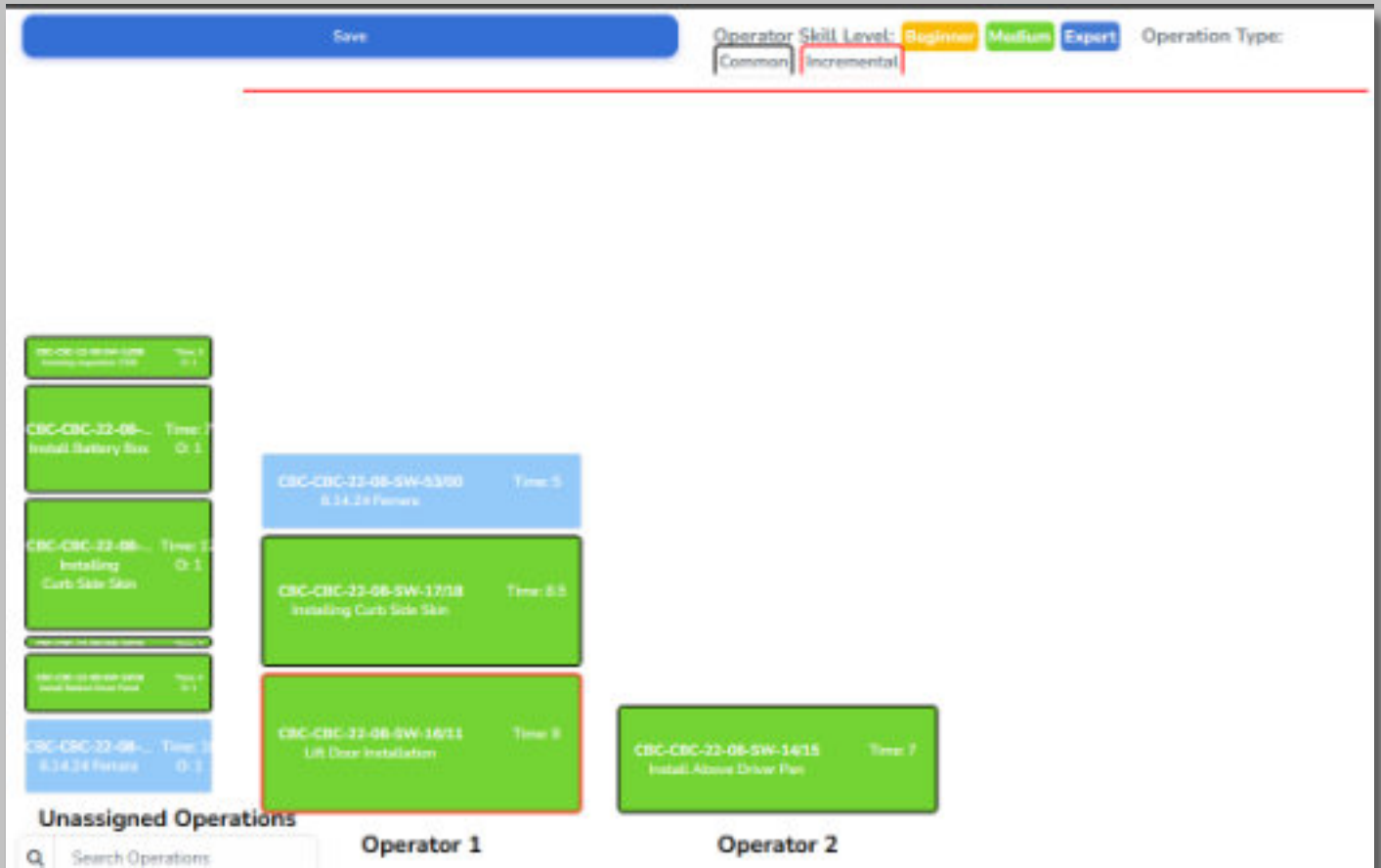
- **Site:** Select the manufacturing site.
- **Department:** Select the department you would like to analyze.
- **Work Station:** Select the workstation you want to evaluate.
- **User:** If left blank, the system will automatically calculate the number of employees required to meet the defined takt time. If specific employees are selected, only those users will appear in the chart.
- **Takt Time:** Enter the target takt time for the workstation.
- **Saved Charts:** Previously created and saved loading charts can be accessed here.

Once all the fields are completed, click **Load Chart** to generate the Operator Loading Chart.

Assigning Operations in the Operator Loading Chart

- After clicking **Load Chart**, the Operator Loading Chart will open in a new browser tab.
- All available operations for the selected workstation will appear on the left side of the screen.
 - Each operation is represented by a block sized according to its cycle time.
- If specific users were selected before loading the chart, those operators will appear across the bottom of the chart.
- If no users were selected:

- Use the **Add Operator** or **Subtrack Operator** buttons to add or remove operators
- To assign work:
 - Click and drag an operation block.
 - Drop it onto the desired operator.
- The red line at the top of the chart represents the defined takt time.
 - As you assign operations, each operators total time will build upward
 - Aim to keep each operator's total workload just below the red takt time line
- Click **Save** to export the current loading chart as a spreadsheet.



CONCLUSION

This Quickstart Guide has provided an overview of Routine's core features, including document creation, revision control, training management, and reporting tools. By organizing operations, managing controlled documents, and maintaining structured training records, Routine supports consistent execution and workforce visibility across your organization. For more detailed information, refer to the Knowledge Base available within the application. If you have any questions or need assistance, please contact josh@optegritysolutions.com.