

# MAINTENANCE

## INTRODUCTION TO TASKS

**Tasks** are set up in order to perform scheduled maintenance / service and are linked to Serialised Items / Locations, with 'Last Done' and 'Next Due' information.

**Generation methodology** is set up against the task to specify the scheduled interval between maintenance / services. For example, the task can be a service that is performed every 3 months. Each task can have more than one generation methodology - where the task is due every 3 months or 10,000 copies - whichever comes first.

**Instructions** linked will indicate what work needs to be done to complete the task.

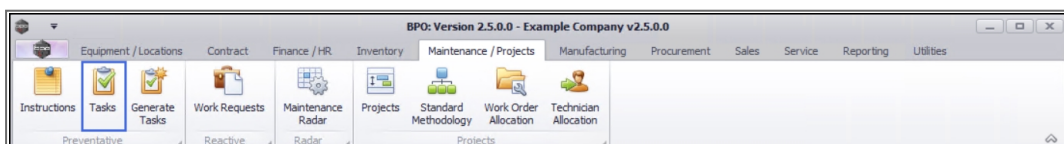
Parts required for the task will be requested where a **Bill of Materials** is indicated.

**Documentation, Shadow** and **Related Tasks** can also be configured.

This will be kept up to date by the generation of the tasks on a regular basis via the **Task Radar** or **Work Order Generation**.

## TASKS PROCESS FLOW

**Ribbon Access:** *Maintenance / Projects > Tasks*



1. The **Tasks** listing screen will be displayed.

## INSTRUCTIONS MAINTENANCE BUTTONS

---

2. From this screen you can [Add](#), [Edit](#), [Delete and View](#) a Task.
3. The [Export](#) button will allow you to export the list of Tasks to a Microsoft Excel Spreadsheet.

## FUNCTIONS TILES

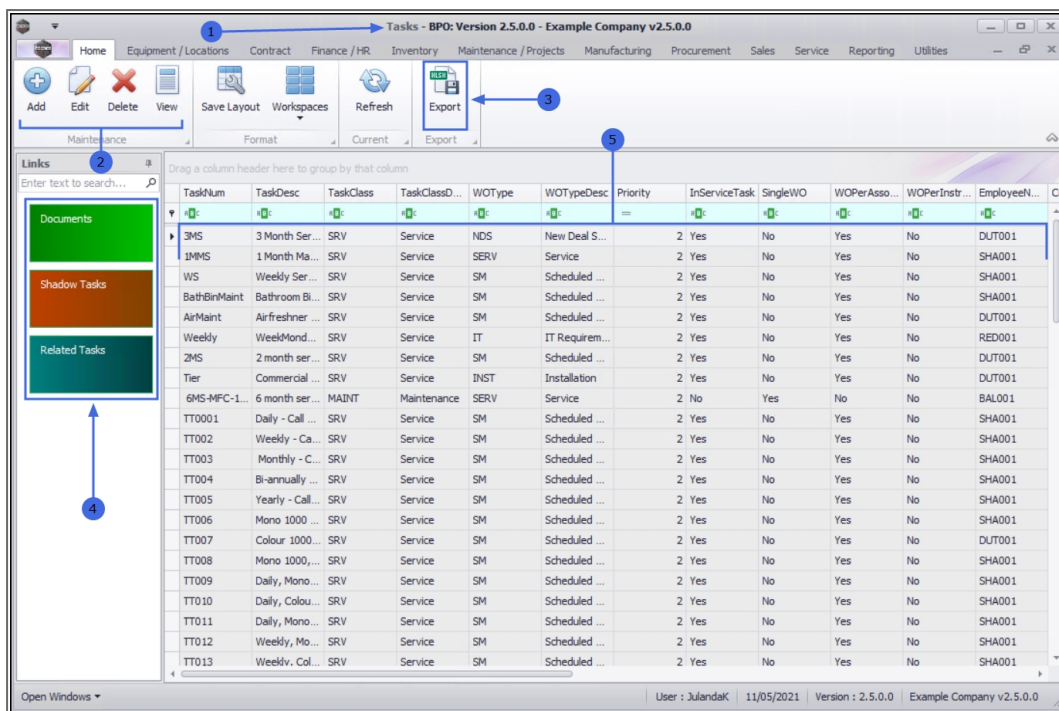
---

- **Documents:** The Documents Tile allows you to view a list of the [digital documents](#) that have been linked to a selected Instruction.
- **Shadow Tasks:** The Shadow Tasks Tile allows you to [link and unlink](#) shadow tasks to the selected Task.
- **Related Tasks:** The Related Tasks Tile allows you to [link and unlink](#) related tasks to the selected Task.

## TASKS DATA GRID

---

5. The Data Grid lists all the **Tasks** that have already been set up. Any new Tasks that gets created, will be added to the list.



Tasks - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Refresh Export

Links

Enter text to search...

Documents

Shadow Tasks

Related Tasks

Drag a column header here to group by that column

TaskNum	TaskDesc	TaskClass	TaskClassD...	WOType	WOTypeDesc	Priority	InServiceTask	SingleWO	WOPerAsso...	WOPerInstr...	EmployeeN...
3MS	3 Month Ser...	SRV	Service	NDS	New Deal S...	2	Yes	No	Yes	No	DUT001
1MMS	1 Month Ma...	SRV	Service	SERV	Service	2	Yes	No	Yes	No	SHA001
WS	Weekly Ser...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
BathBinMaint	Bathroom Bi...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
AirMaint	Airfresher ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001
Weekly	WeekMond...	SRV	Service	IT	IT Requirem...	2	Yes	No	Yes	No	RED001
2MS	2 month ser...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001
Tier	Commercial ...	SRV	Service	INST	Installation	2	Yes	No	Yes	No	DUT001
6MS-MFC-1...	6 month ser...	MAINT	Maintenance	SERV	Service	2	No	Yes	No	No	BAL001
TT0001	Daily - Call ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT002	Weekly - Ca...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT003	Monthly - C...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT004	Bi-annually ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT005	Yearly - Call...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT006	Mono 1000 ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT007	Colour 1000...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001
TT008	Mono 1000,...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT009	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT010	Daily, Colou...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT011	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT012	Weekly, Mo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT013	Weeklv. Col...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001

Open Windows

User: JulandaK 11/05/2021 Version: 2.5.0.0 Example Company v2.5.0.0

BPO.MNU.044

