



LOCATIONS

FUNCTIONAL LOCATIONS - MAINTENANCE METHODOLOGY (TASK SCHEDULE)

Ribbon Access: Equipment and Locations > Functional Locations

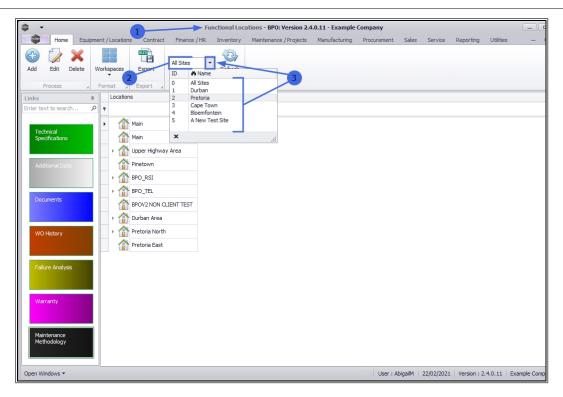


1. The *Functional Locations* screen will be displayed.

SELECT THE SITE

- 2. The *Site* filter will be set according to your company configuration.
- 3. You do not need to select a specific site, however if you wish to narrow your filter parameters, you can click on the *drop-down arrow* and select a particular site from the list.
 - For a detailed handling of this topic refer to Site Selection.





SELECT THE LOCATION

 Select the *row* of the *location* where you wish to link Maintenance Tasks.

MAIN LOCATION

If the Maintenance Methodology is to be linked to a *main* location, select the *row* of that main location. In this example, *Upper Highway Area* is a main location.

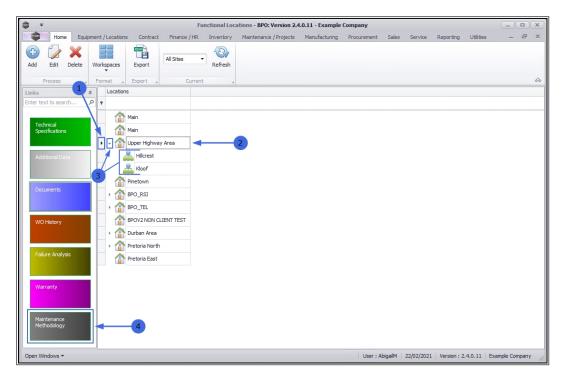
SUB-LOCATION

 If the Maintenance Methodology is to be linked to a *sub-location*, ensure that you *expand* the main (parent) location to be able to view and select the row of that sub-location. In this example, *Hillcrest* and *Kloof* are sub-locations of Upper Highway Area.



VIEW MAINTENANCE METHODOLOGY

 When you have selected the right location, click on the *Maintenance Methodology* tile.

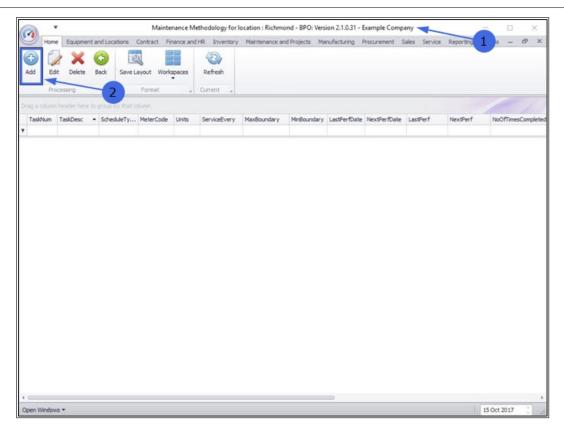


1. The *Maintenance Methodology for location:* [] screen will open.

ADD NEW TASK SCHEDULE

1. Click on *Add*.





- 1. The Add new task schedule screen will open.
- 2. Click on the *search* button in the *Task Num* field.



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- 1. The *Select the task schedule* screen will pop up.
- 2. Select the *row* of the *task schedule* you wish to link to this location.
- 3. Click on *Ok*.



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TASK SCHEDULE DETAILS

 The Schedule Type, Units, Meter, Min Reading, and Max Reading fields will populate automatically according to your *Task Num* choice.



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- Last Performed: Click on the drop-down arrow and use the calendar function to select the date this task was <u>last</u> performed.
- Next Performance: Click on the drop-down arrow and use the calendar function to select the date this task will <u>next</u> be due.
- **Times Completed**: Type in or use the arrow indicators to select the number of times this task has been done.
- Factor: Type in or use the arrow indicators to select the amount by which to multiply the bill of materials on this task (for example, the task has a BOM to request and issue 1 bottle of disinfectant, but it is a large room - so you need 2 bottles. Type in 2 and this will be multiplied by the 1 from the Task Bill of Materials).



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- Includes Weekends / Includes Holidays: Select whether you want the task to generate on Weekends and/or Holidays (if unselected, the task will not generate on a Weekend or Public Holiday (as configured in Scheduling).
- Day of Week / Week of Month: For monthly tasks, if you have a preferred day for the tasks to generate, then select *Day of the Week* and *Week of the Month*.

SAVE TASK SCHEDULE

 When you have finished filling in the Task Schedule details, click on Save.



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VIEW NEW LOCATION TASK SCHEDULE

• You can now view the new *Maintenance Task* in the *Maintenance Methodology for location:* [] screen.



Functional Location Maintenance Methodology

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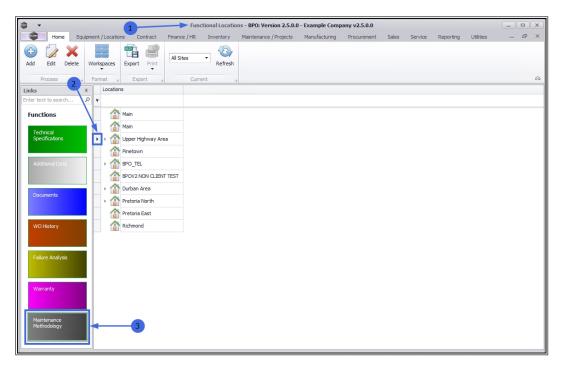
EDIT LOCATION TASK SCHEDULE

SELECT LOCATION

- 1. In the *Functional Locations* screen,
- 2. Select the location where you wish to *edit* the task schedule.

SELECT MAINTENANCE METHODOLOGY

3. Click on the *Maintenance Methodology* tile.



1. The Maintenance *Methodology for location: []* screen will open.

SELECT TASK

- 2. If there is more than one row in the data grid, select the *row* of the task where you wish to make changes.
- Note that this task can currently be performed on *weekends* and *public holidays*. This will be edited in the next screen.



EDIT TASK

4. Click on *Edit*.

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- 1. The *Edit task schedule* screen will open.
- 2. Only the fields within the <u>highlighted</u> sections can be edited from this screen.
- 3. In this example, the *Include Weekend* and *Include Holidays* check boxes are to be *deselected* so that tasks cannot be performed on those days.



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- 1. Edit the required fields.
 - In this example, both the *Include Weekends* and *Include Hol-idays* check boxes have now been deselected, indicating that tasks can no longer be performed on those days if the scheduled task date should fall on either a Saturday or Sunday or on a public hol-iday.

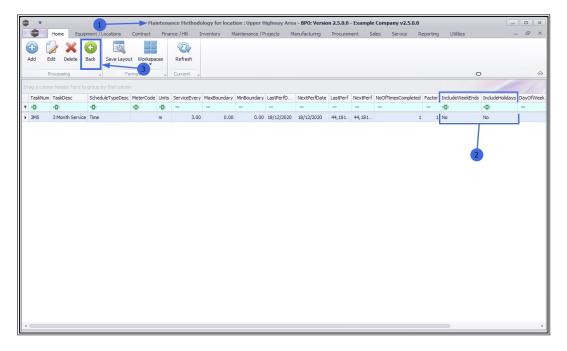
SAVE CHANGES

2. Click on *Save*.



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- 1. You will return to the Maintenance Methodology for location: [] screen.
- Note that the *Include Weekends* and *Include Holidays* columns have been updated to 'No' as per the changes made in the previous screen.
- 3. Click on *Back* to return to the *Functional Locations* Listing screen.





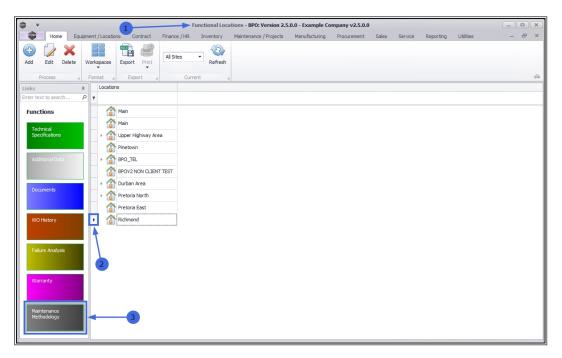
DELETE TASK SCHEDULE

SELECT TASK

- 1. In the *Functional Locations* screen,
- 2. Select the location where you wish to *delete* the task schedule.

SELECT MAINTENANCE METHODOLOGY

3. Click on the *Maintenance Methodology* tile.



1. The Maintenance *Methodology for location: []* screen will open.

SELECT TASK

2. If there is more than one row in the data grid, select the *row* of the task that you wish to remove.



DELETE TASK

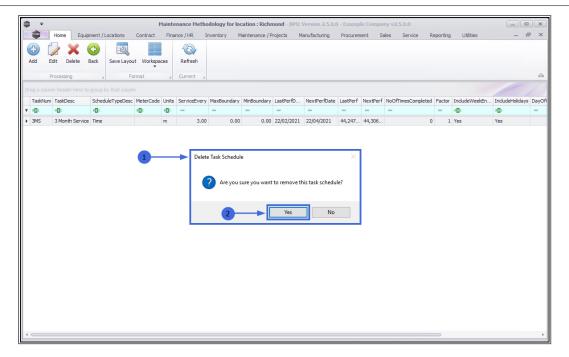
3. Click on *Delete*.

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CONFIRM DELETION

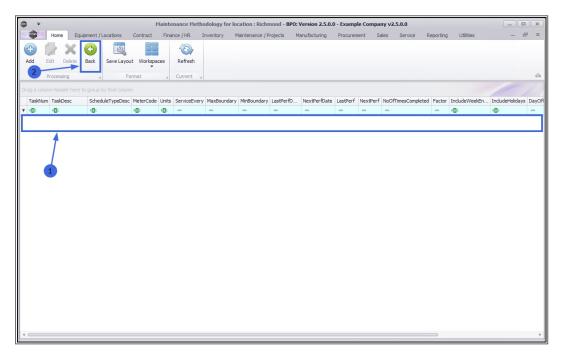
- 1. A *Delete Task Schedule* message box will pop up with the following prompt:
 - Are you sure you want to remove this task schedule?
- 2. Click on Yes.





VIEW DELETION RESULTS

- 1. The selected task schedule will be *removed* from the screen.
- 2. Click on *Back* to return to the *Functional Locations* screen.





Related Topics

- Introduction to Functional Locations
- Add a New Functional Location
- Edit a Functional Location
- Delete a Functional Location
- Location Technical Specifications
- Location Additional Data
- Location Documents
- Location Work Order History
- Location Failure Analysis
- Location Warranty
- Location Add a New Location Contract

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