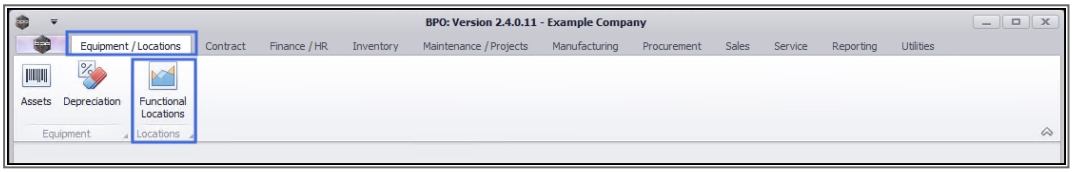
LOCATIONS

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.

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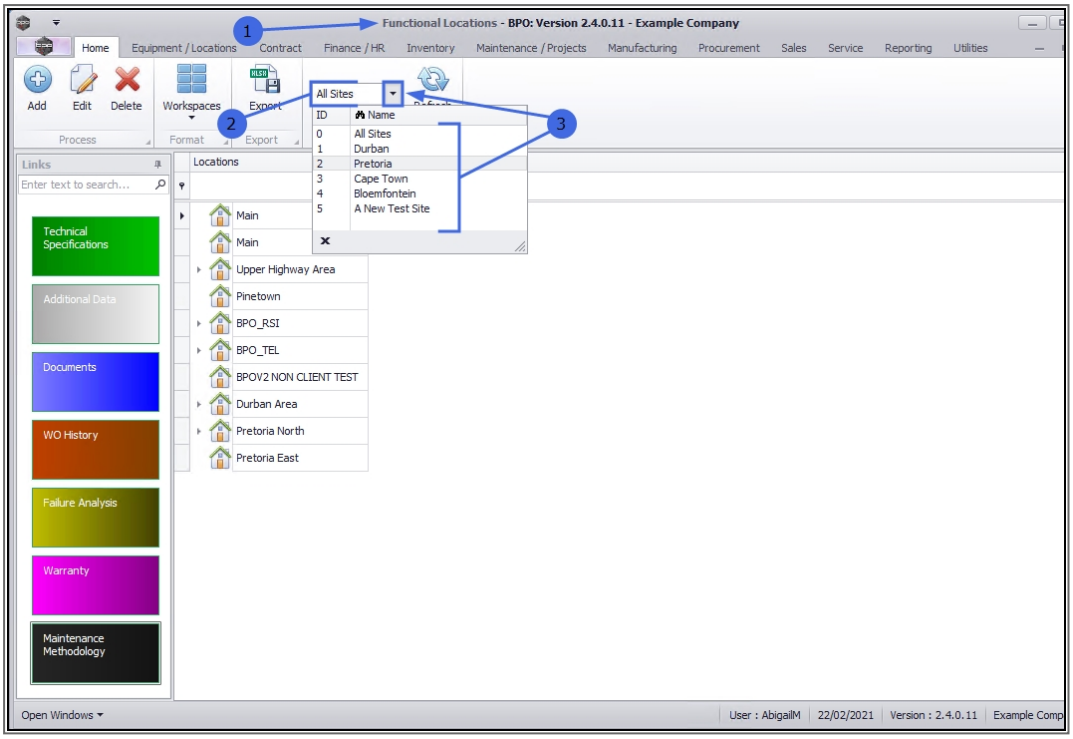

SELECT THE LOCATION

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

MAIN LOCATION

2. 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

3. 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.

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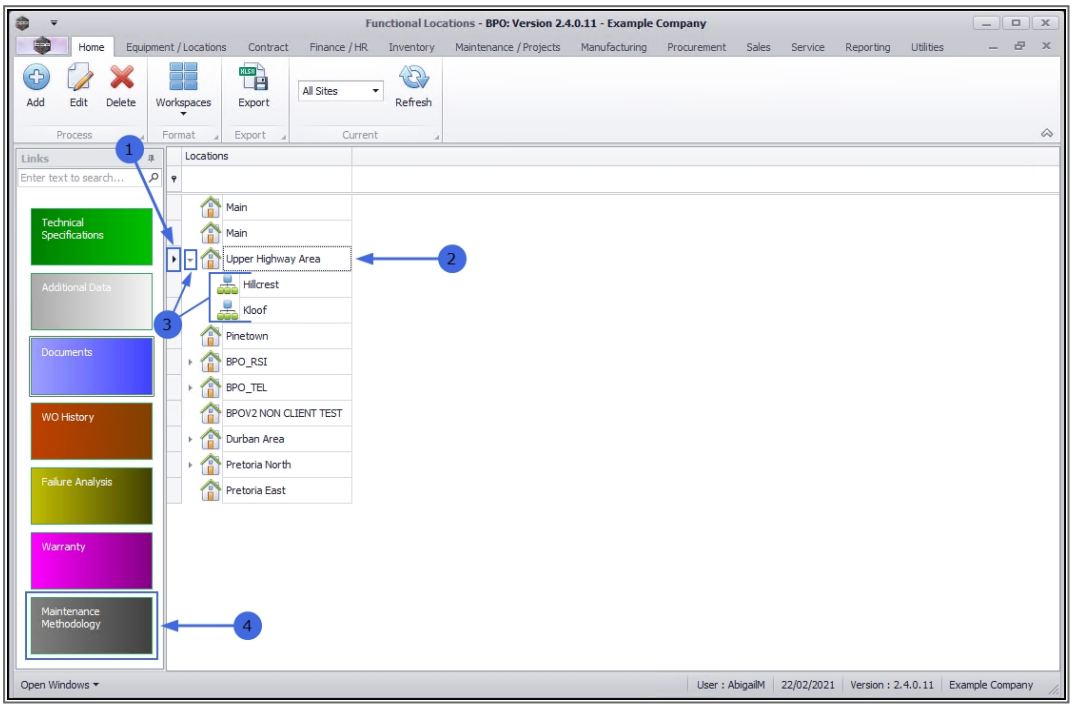
VIEW MAINTENANCE METHODOLOGY

1. 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***.

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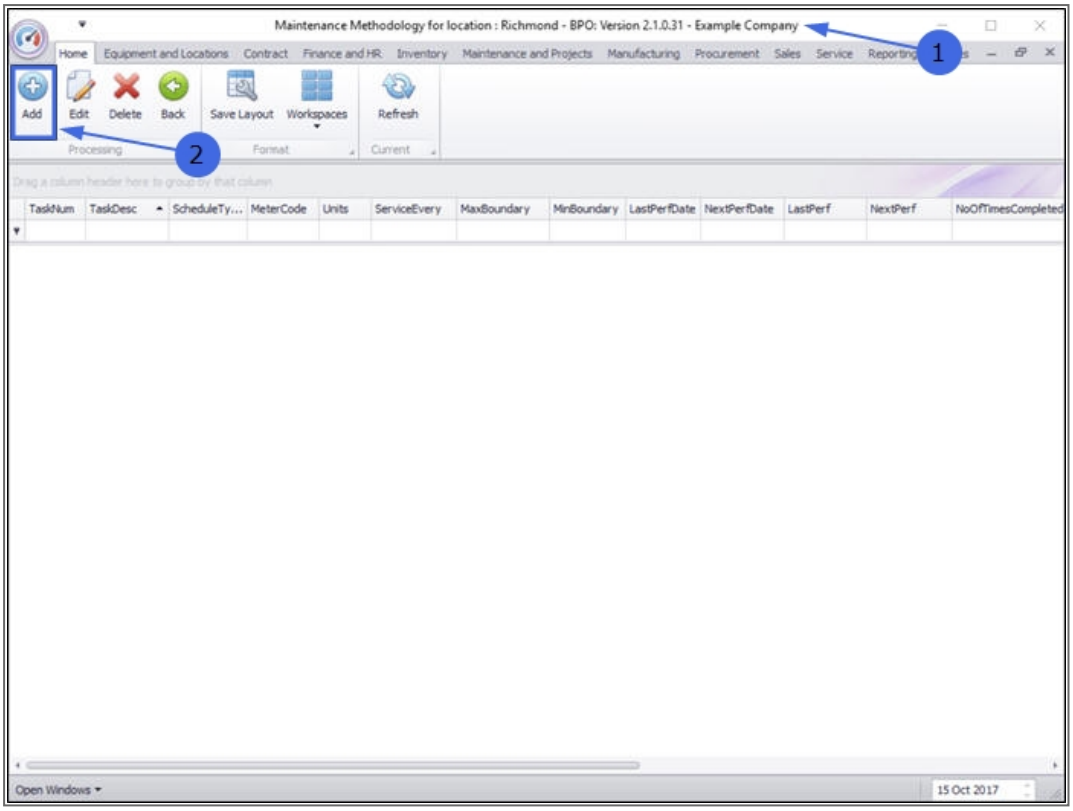

1. The ***Add new task schedule*** screen will open.
2. Click on the ***search*** button in the ***Task Num*** field.

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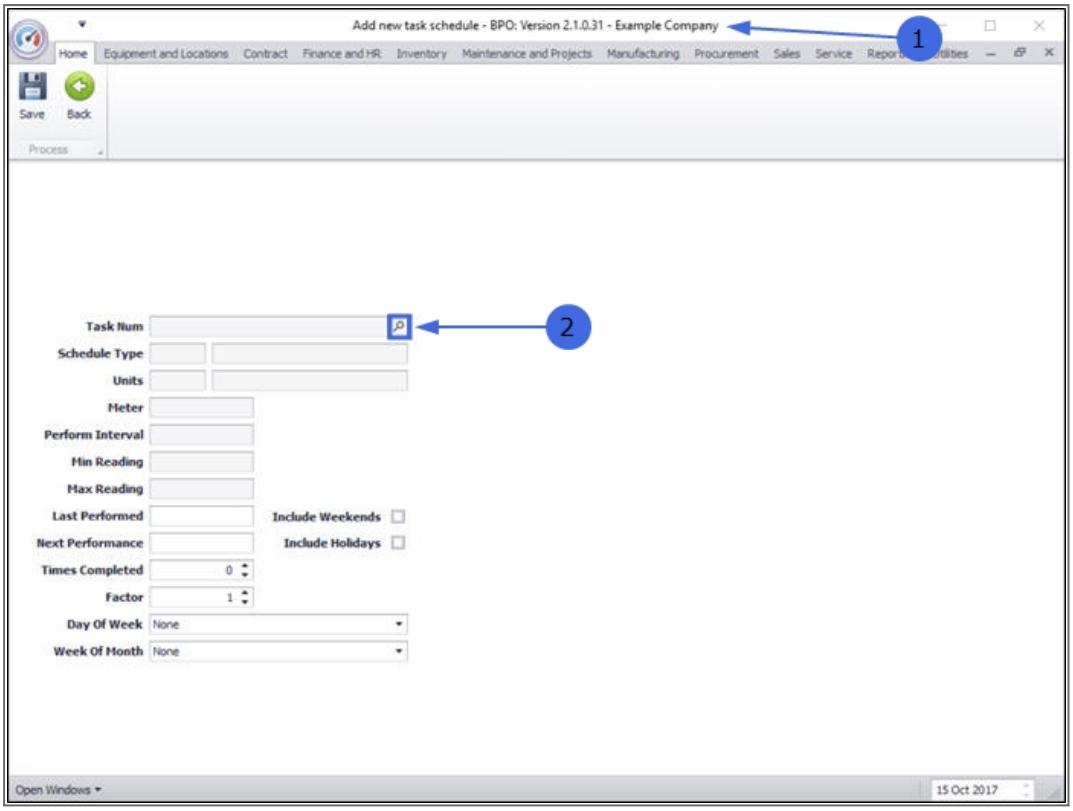

1. The ***Select the task schedule*** screen will pop up.
2. Select the ***row*** of the ***task schedule*** you wish to link to this location.
3. Click on ***Ok***.

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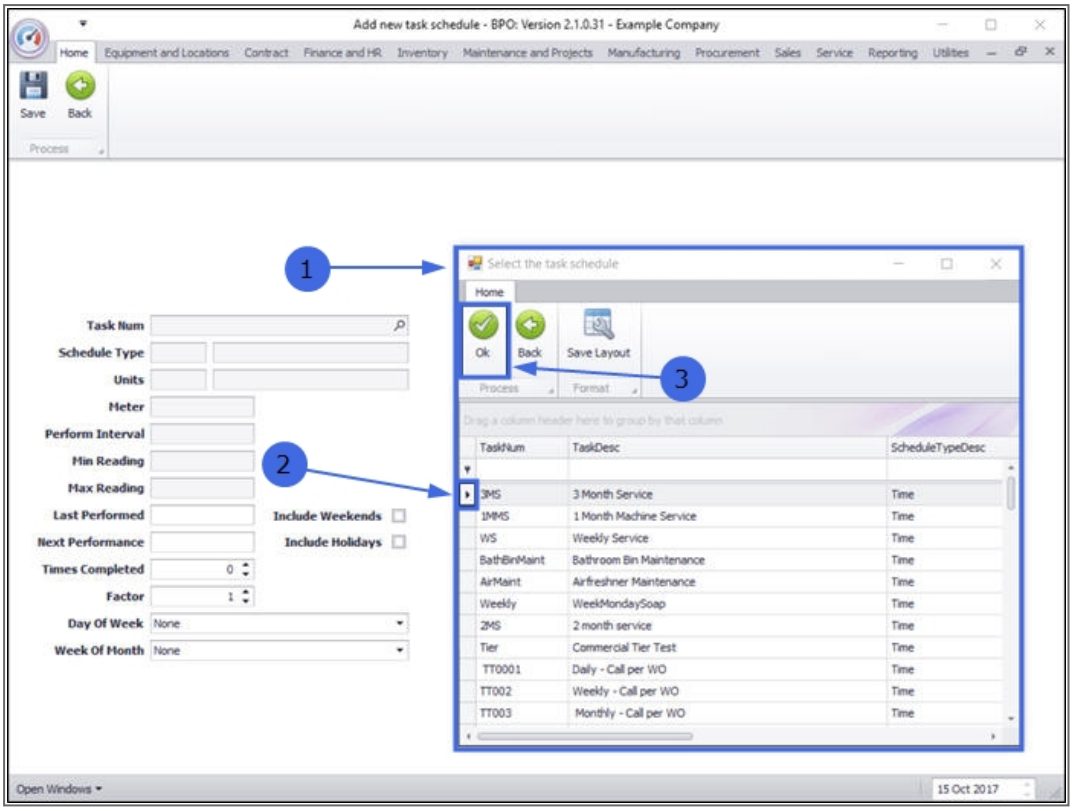

TASK SCHEDULE DETAILS

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

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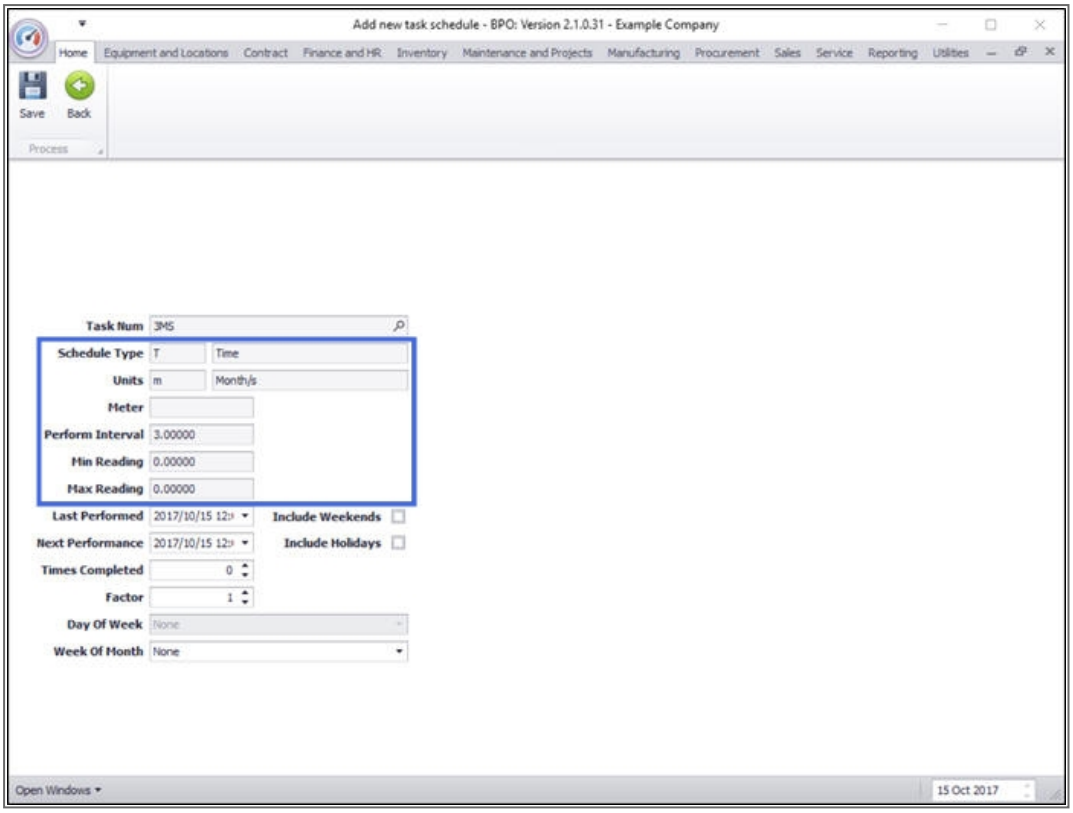

- **Last Performed**: Click on the drop-down arrow and use the calendar function to select the date this task was last performed.
- **Next Performance**: Click on the drop-down arrow and use the calendar function to select the date this task will next be due.
- **Times Completed**: Type in or use the 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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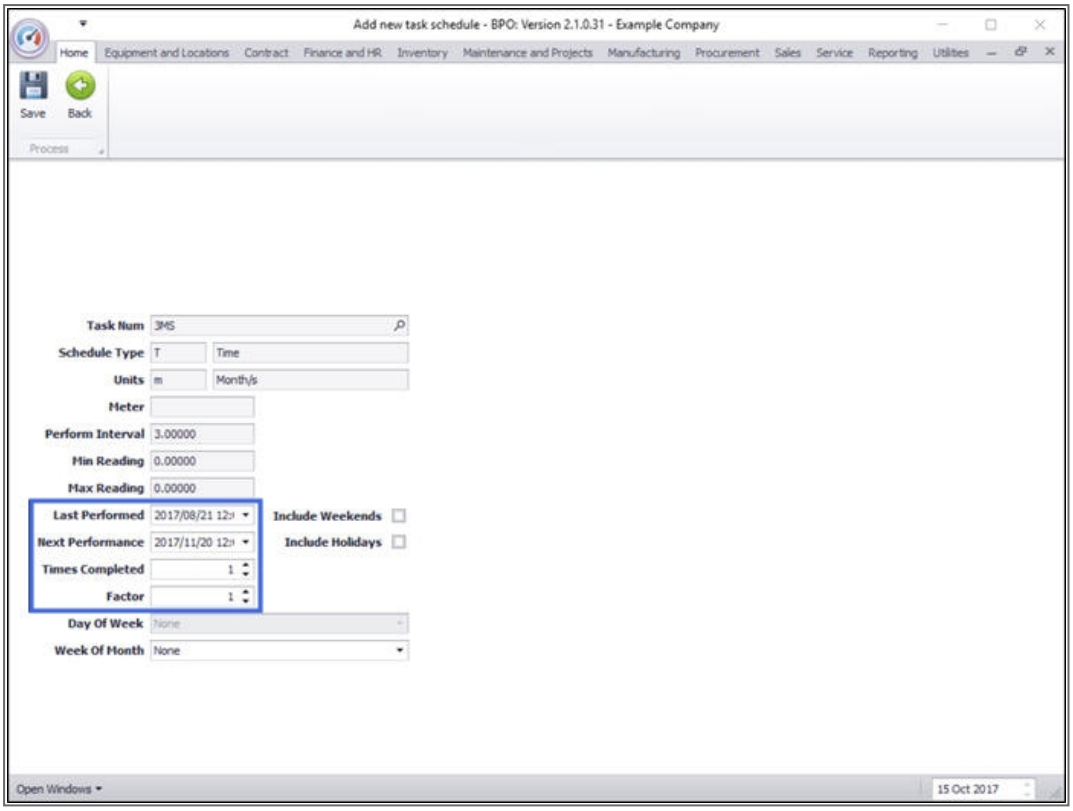

1. **Includes Weekends / Includes Holidays:** Select whether you want the task to generate on ***Weekends*** and/or ***Holidays*** (if unselected, the task will not generate on a Weekend or Public Holiday (as configured in Scheduling).
2. **Day of Week / Week of Month:** For monthly tasks, if you have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

SAVE TASK SCHEDULE

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

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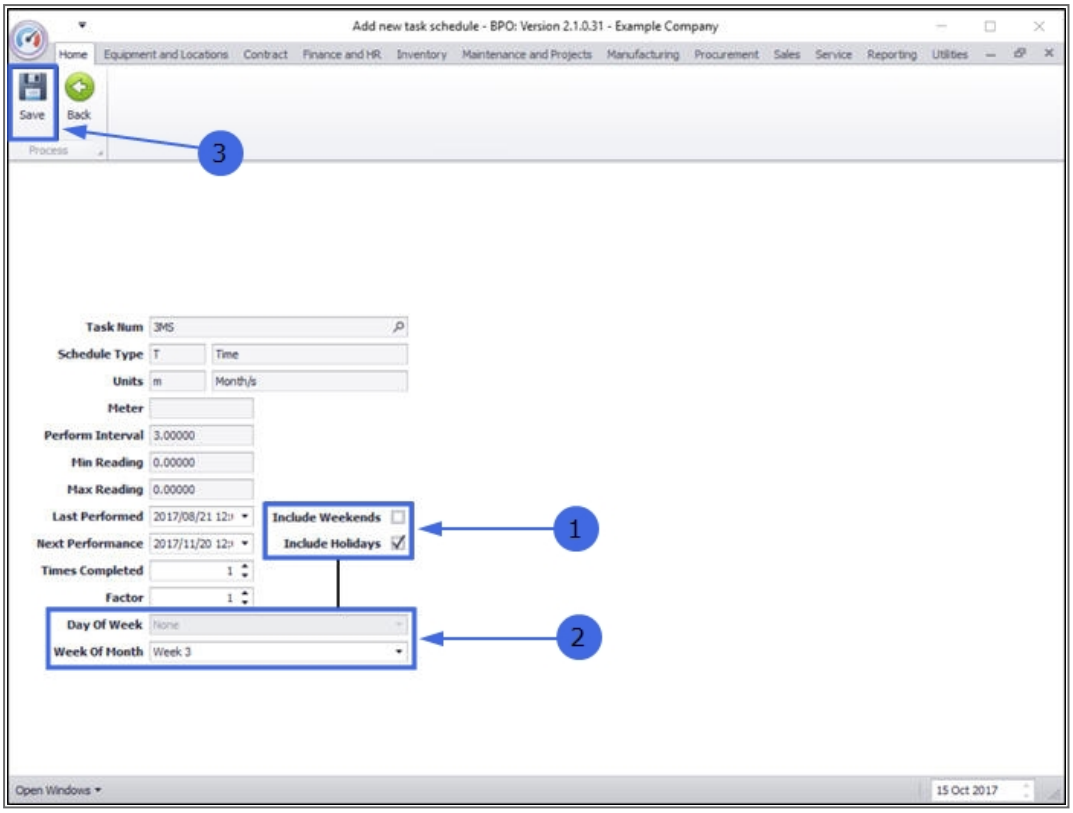

VIEW NEW LOCATION TASK SCHEDULE

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

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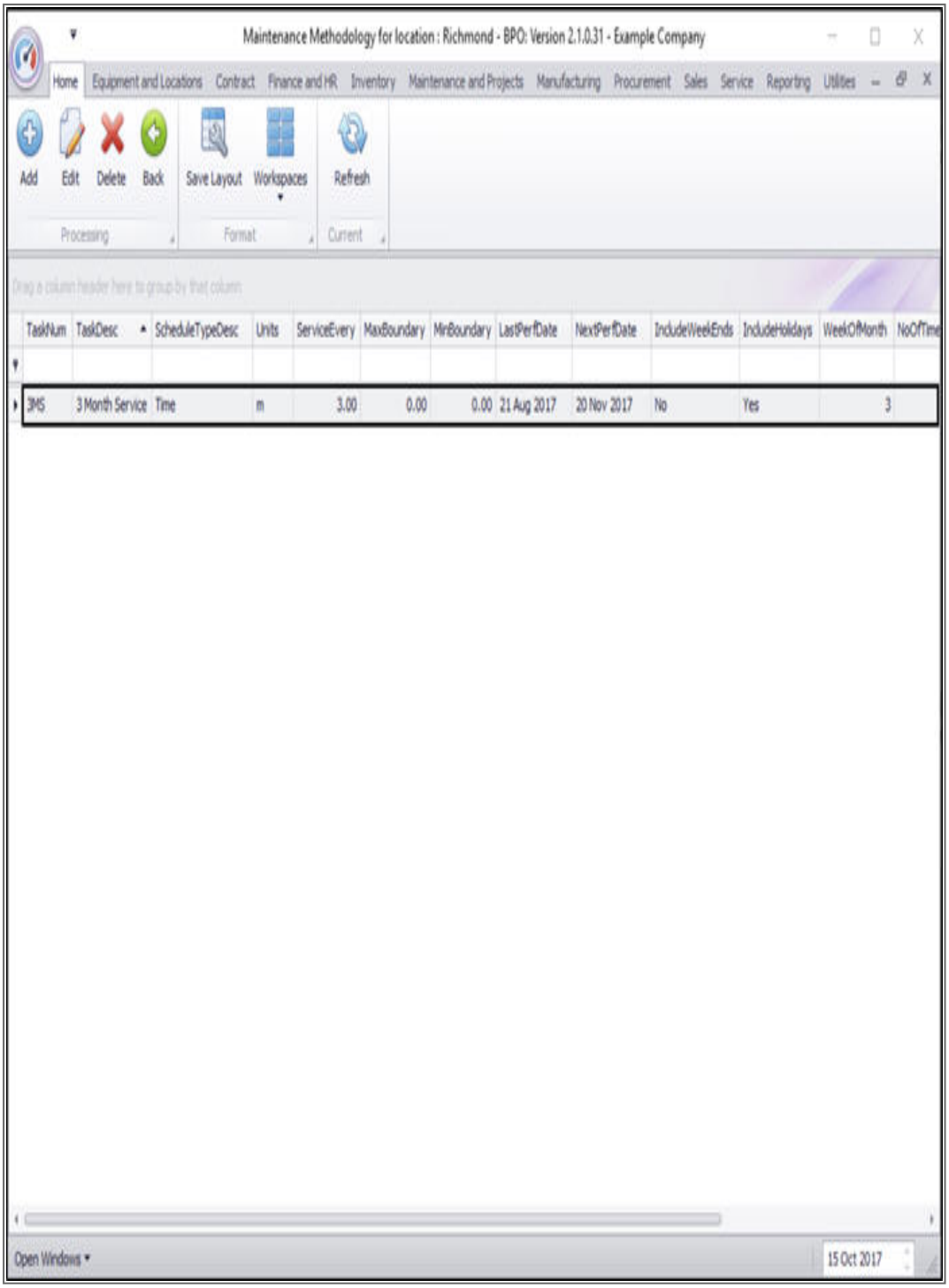

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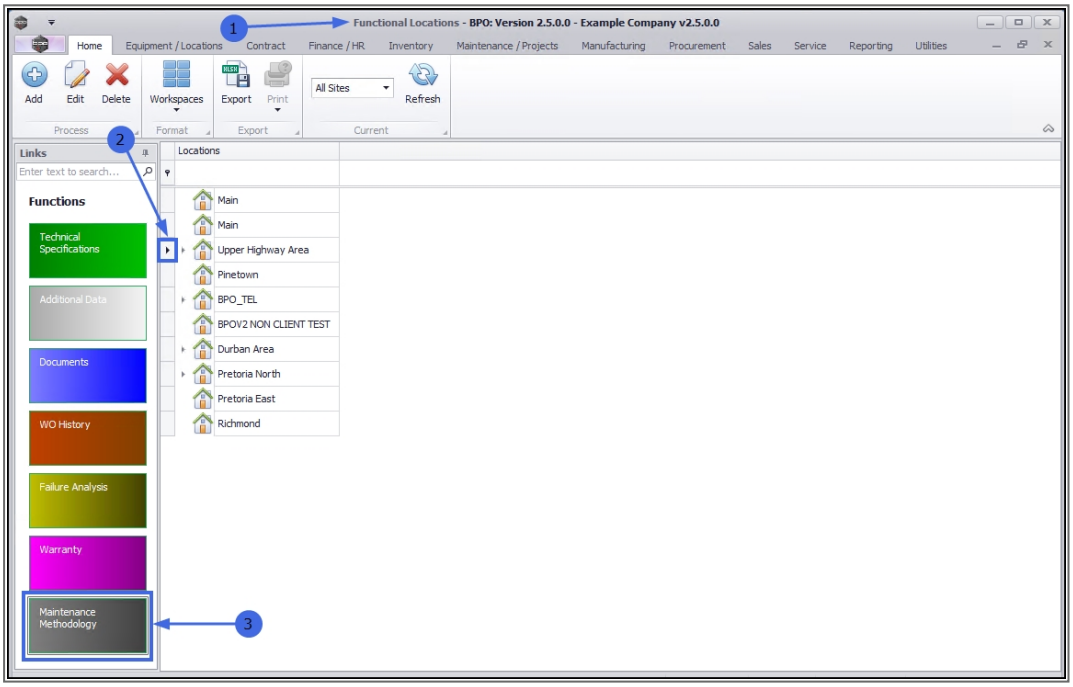
EDIT LOCATION TASK SCHEDULE

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.
3. Note that this task can currently be performed on ***weekends*** and ***public holidays***. This will be edited in the next screen.

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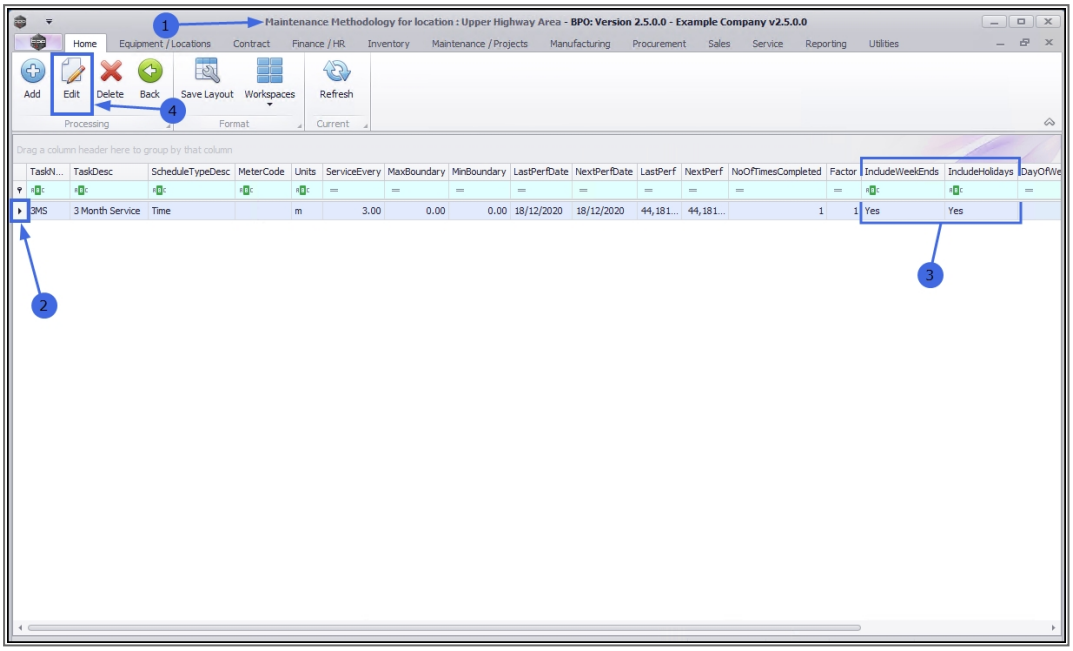
EDIT TASK

4. Click on ***Edit***.



1. The ***Edit task schedule*** screen will open.
2. Only the fields within the highlighted 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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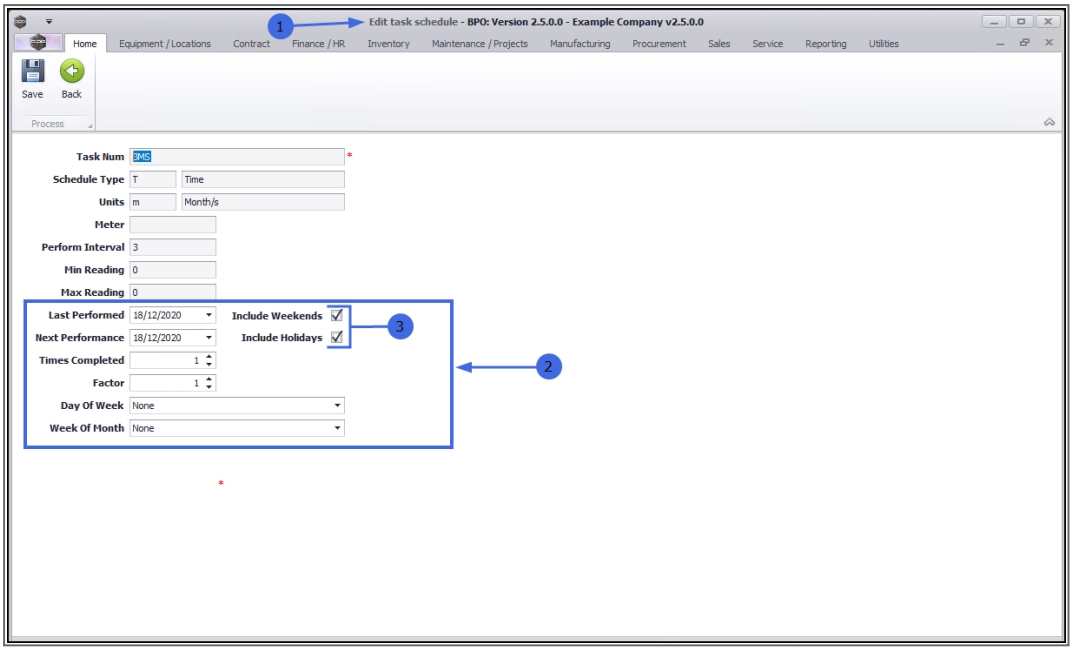

1. Edit the required fields.
    - In this example, both the ***Include Weekends*** and ***Include Holidays*** check boxes have now been deselected, indicating that tasks can no longer be performed on those days if the scheduled task date should fall on either a Saturday or Sunday or on a public holiday.

SAVE CHANGES

2. Click on ***Save***.

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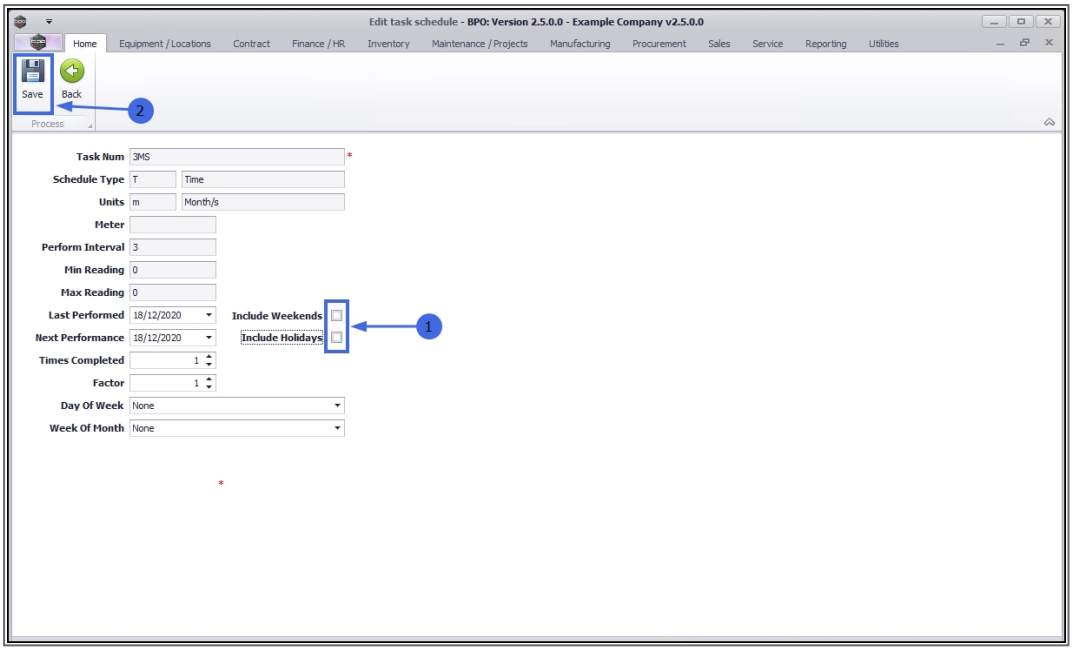
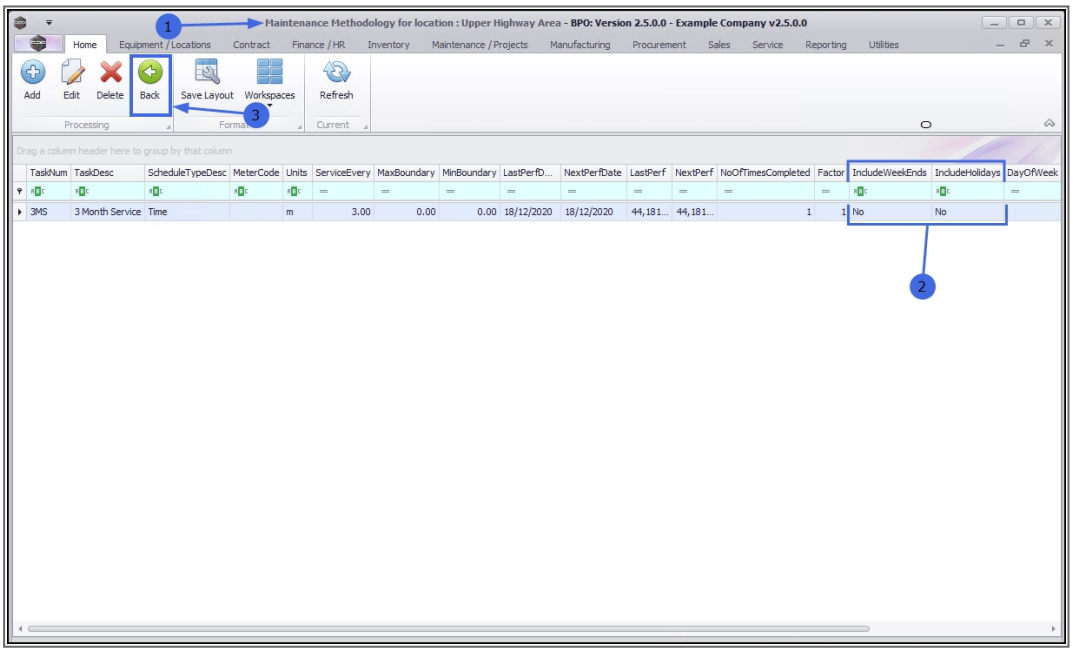


1. You will return to the Maintenance Methodology for location: [] screen.
2. Note that the ***Include Weekends*** and ***Include Holidays*** columns have been updated to '**No**' as per the changes made in the previous screen.
3. Click on ***Back*** to return to the ***Functional Locations*** Listing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



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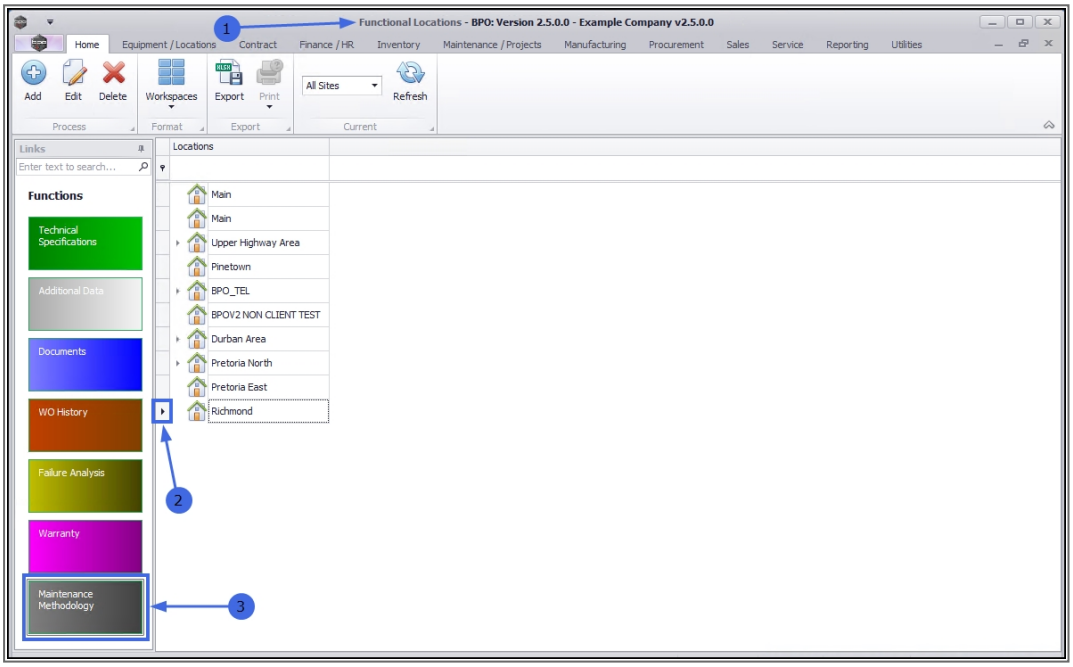
DELETE TASK SCHEDULE

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.

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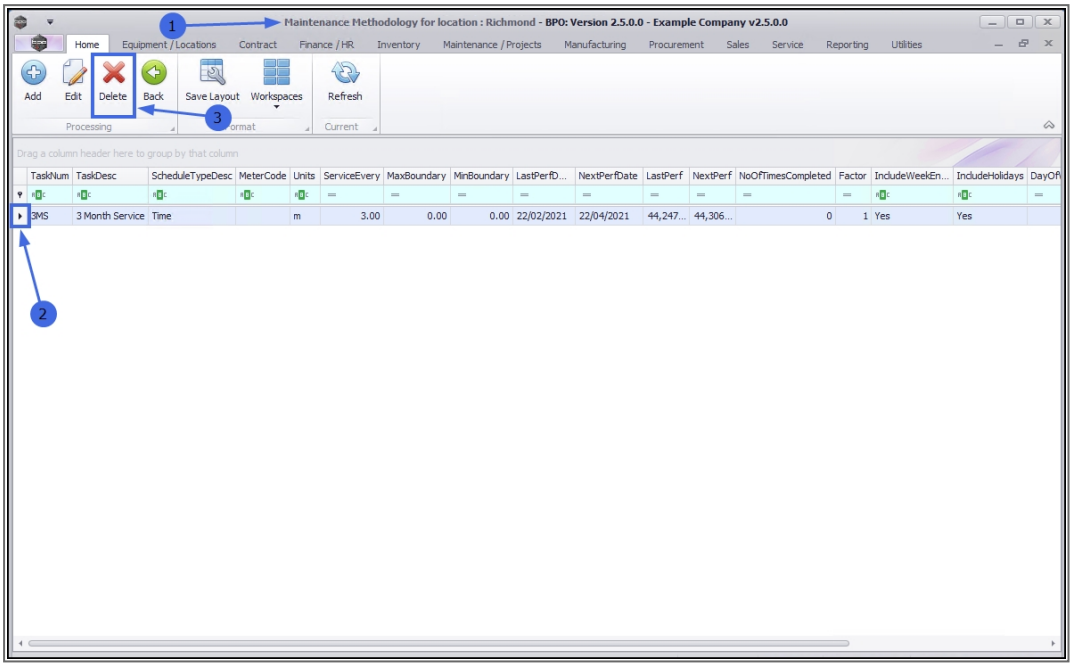
DELETE TASK

3. Click on ***Delete***.



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***.

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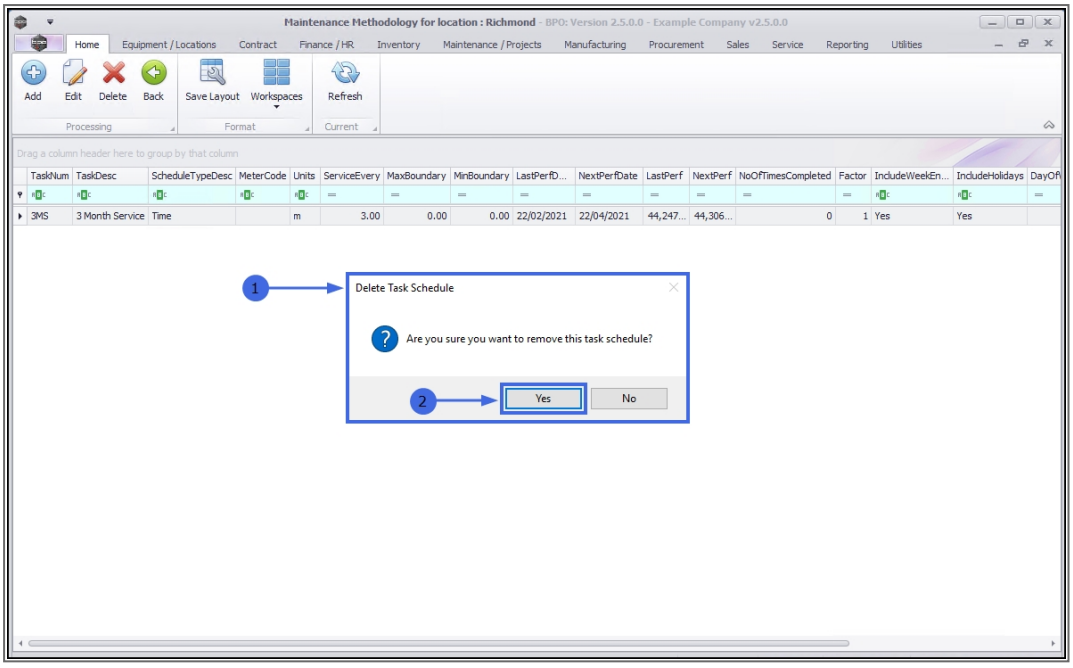
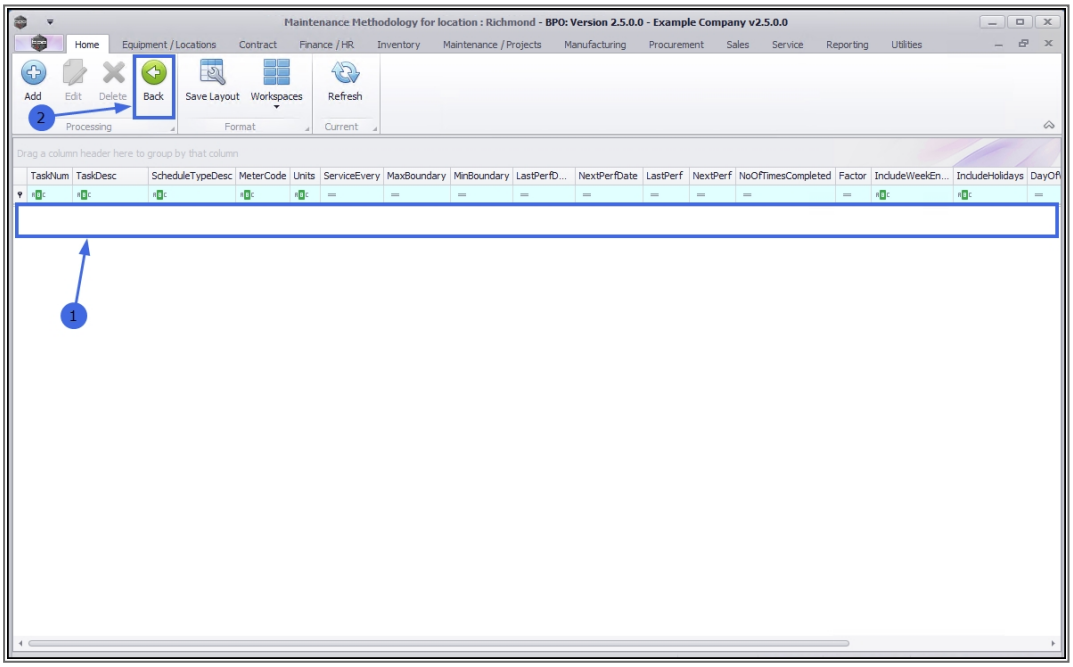


VIEW DELETION RESULTS

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



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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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