

EQUIPMENT

ASSETS – MAINTENANCE

(Assign a Task)

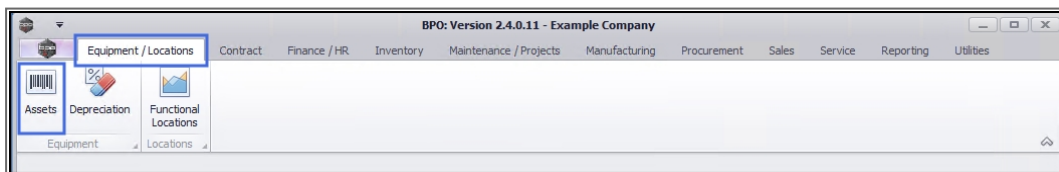
To generate a call from this task using the **task radar**, the machine should be on an **active contract** with a **contact person** assigned.

Also remember to check that **the task** has been set up correctly.

There are two types of **Task Interval Types** that can be assigned to an asset:

- **Condition**-based task schedules: These are usually meter definition based, e.g. **Copies Made**.
- **Time**-based task schedules: These are linked to time periods e.g. **Days, Weeks, Months** or **Years**.
- [Add new Condition-based Task Schedule](#)
- [Add new Time-based Task Schedule](#)

Ribbon Access: *Equipment and Locations > Assets*



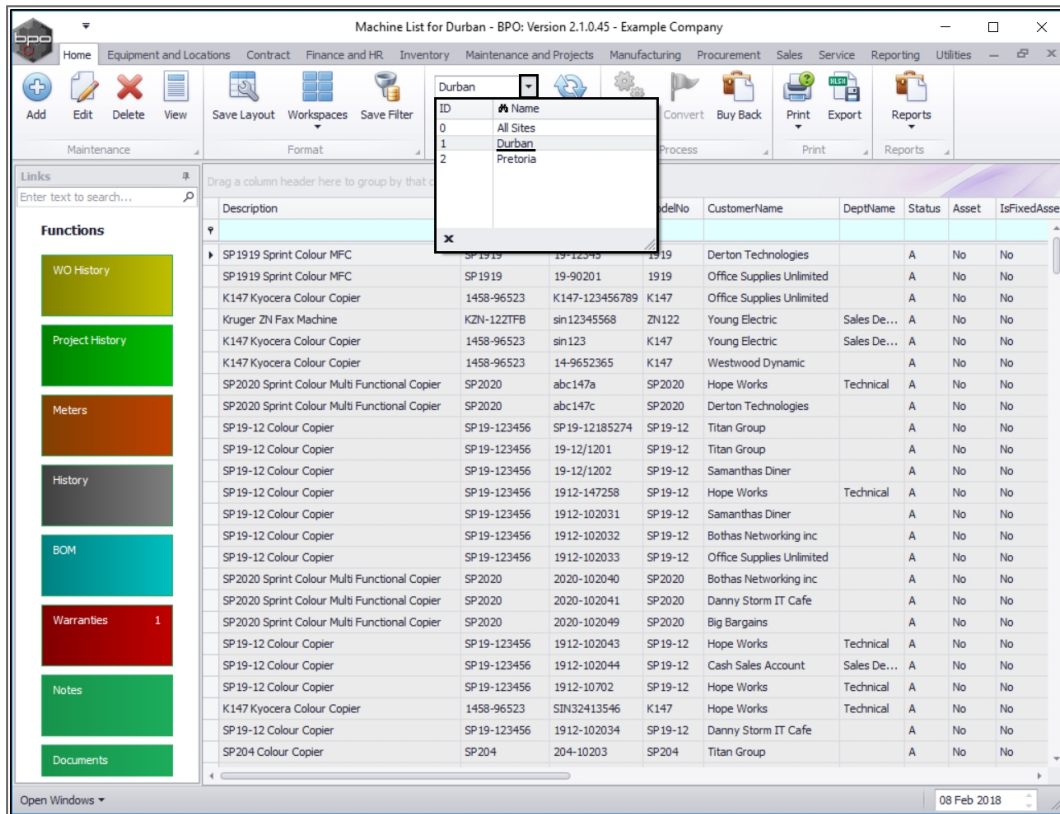
The **Machine List for []** screen will be displayed.

THE SITE AND TYPE FILTERS

The screen will open with the default **Site** setting configured on the user and the Equipment **Type** filter set to '**All**' (machines).

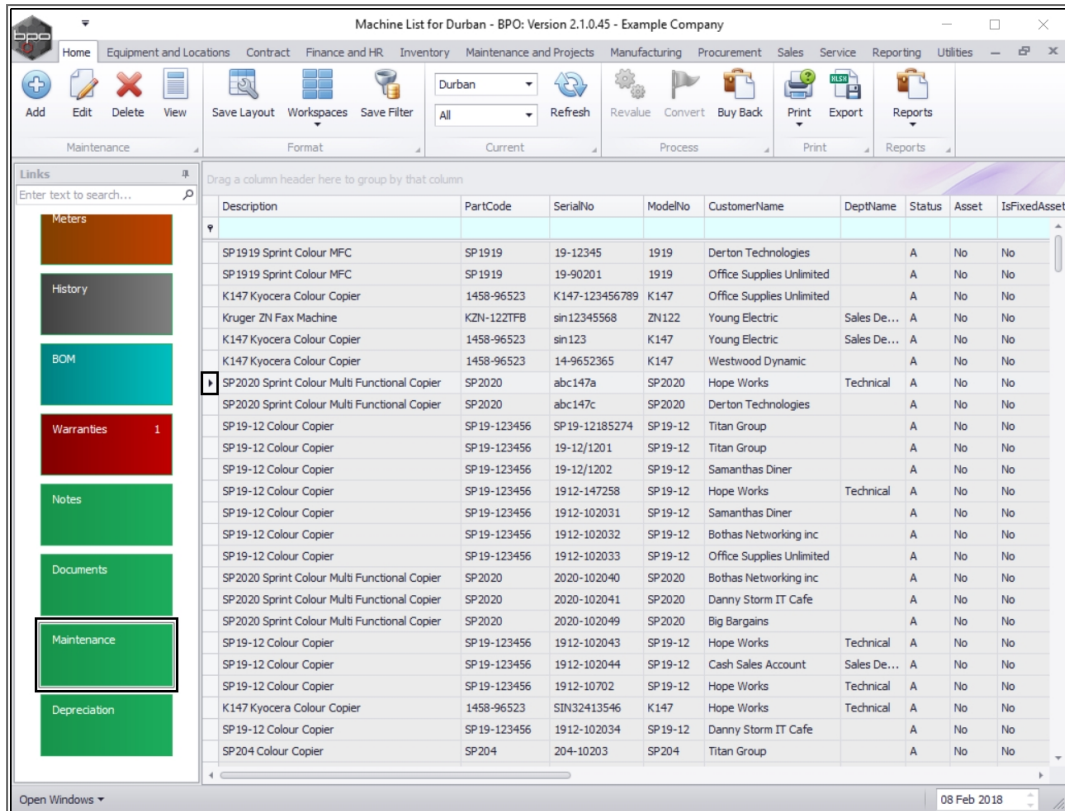
Note: Refer to [Site Selection](#) for more information about Site settings.

- You do not need to select a specific **Site** or **Type** in this screen, however, if you wish to narrow your filter parameters, you can click on the **drop-down arrows** and select a particular Site and Type from the list.
- In this example, the **Durban** site is selected.



SELECT ASSET

- Select the **row** of the **serialised item** where you wish to **assign a task**.
- Click on the **Maintenance** tile.

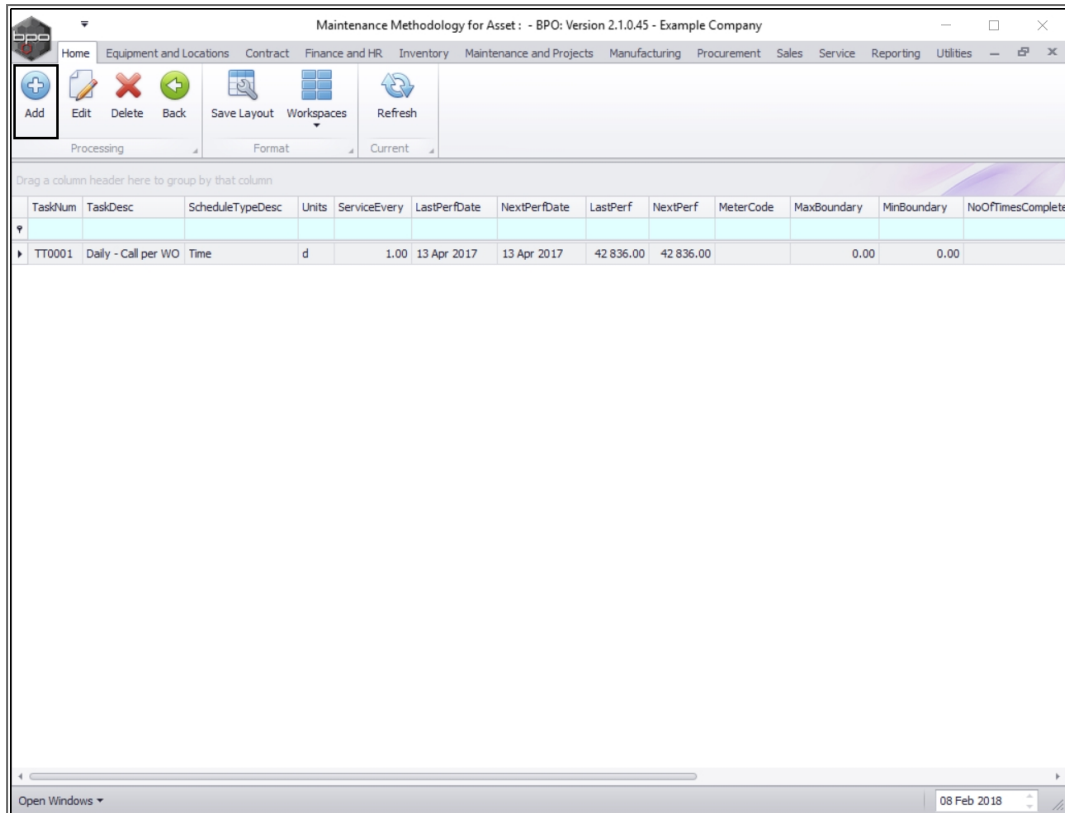


The screenshot shows the CO3 Technologies software interface. The main window is titled "Machine List for Durban - BPO: Version 2.10.45 - Example Company". The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu bar is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Refresh, Revalue, Convert, Buy Back, Print, Export, and Reports. The left sidebar contains a "Links" section with a search bar and several colored buttons: Meters (orange), History (grey), BOM (teal), Warranties (red, with a small '1' icon), Notes (green), Documents (green), Maintenance (green, highlighted with a black border), and Depreciation (green). The main area displays a table of machine data with columns: Description, PartCode, SerialNo, ModelNo, CustomerName, DeptName, Status, Asset, and IsFixedAsset. The table lists various machines, including Sprint Colour MFC, Kyocera Colour Copier, and Sprint Colour Multi Functional Copier, with their respective details.

ADD NEW TASK

The ***Maintenance Methodology for Asset:*** screen will be displayed.

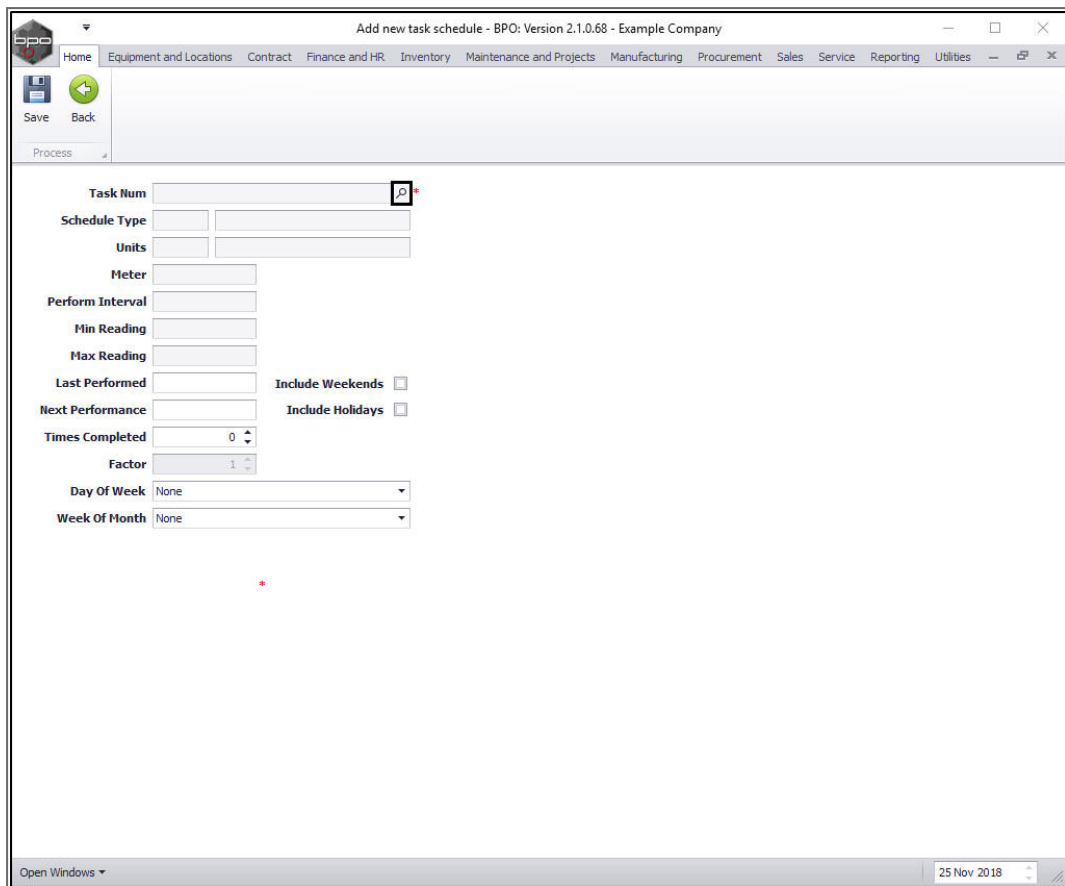
- Click on **Add**.



TaskNum	TaskDesc	ScheduleTypeDesc	Units	ServiceEvery	LastPerfDate	NextPerfDate	LastPerf	NextPerf	MeterCode	MaxBoundary	MinBoundary	NoOfTimesComplete
TT0001	Daily - Call per WO	Time	d	1.00	13 Apr 2017	13 Apr 2017	42 836.00	42 836.00		0.00	0.00	

The **Add new task schedule** screen will be displayed.

- **Task Num:** Click on the **search** button in this field.



Add new task schedule - BPO: Version 2.1.0.68 - Example Company

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

Save Back

Process

Task Num

Schedule Type

Units

Meter

Perform Interval

Min Reading

Max Reading

Last Performed

Next Performance

Times Completed

Factor

Day Of Week

Week Of Month

Include Weekends ☐

Include Holidays ☐

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TASK SCHEDULE OPTIONS

The *Select the task schedule* pop up screen will appear.

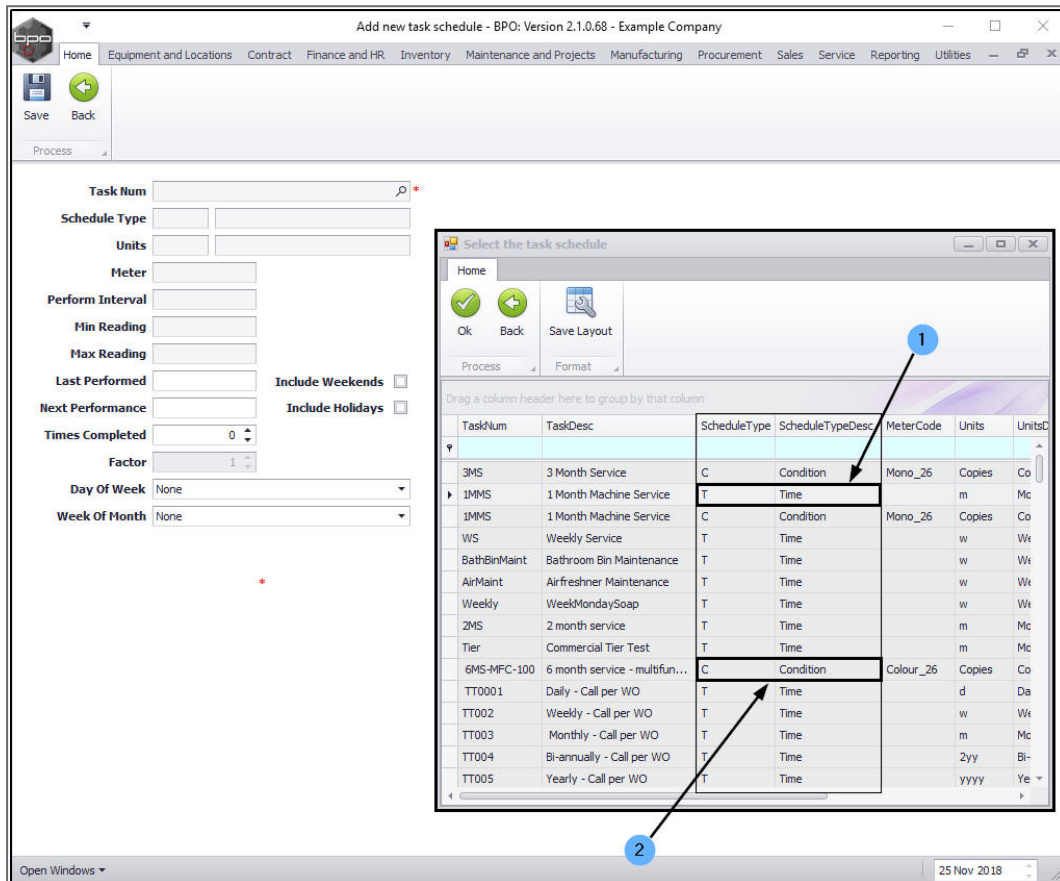
You will note in this screen that there are **2** types of schedule to select from:

Time Based Schedule

1. If a **time**-based schedule is selected - then certain fields will auto populate the Add new task schedule screen and the **Last Performance** and **Next Performance** fields will be based on **date selections**.

Condition Based Schedule

2. **Condition:** if a **condition**-based schedule is selected - then certain fields will auto populate the Add new task schedule screen and the **Last Performance** and **Next Performance** fields will be based on **meter readings**.



Task Num

Schedule Type

Units

Meter

Perform Interval

Min Reading

Max Reading

Last Performed

Next Performance

Times Completed

Factor

Day Of Week

Week Of Month

Include Weekends ☐

Include Holidays ☐

Select the task schedule

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

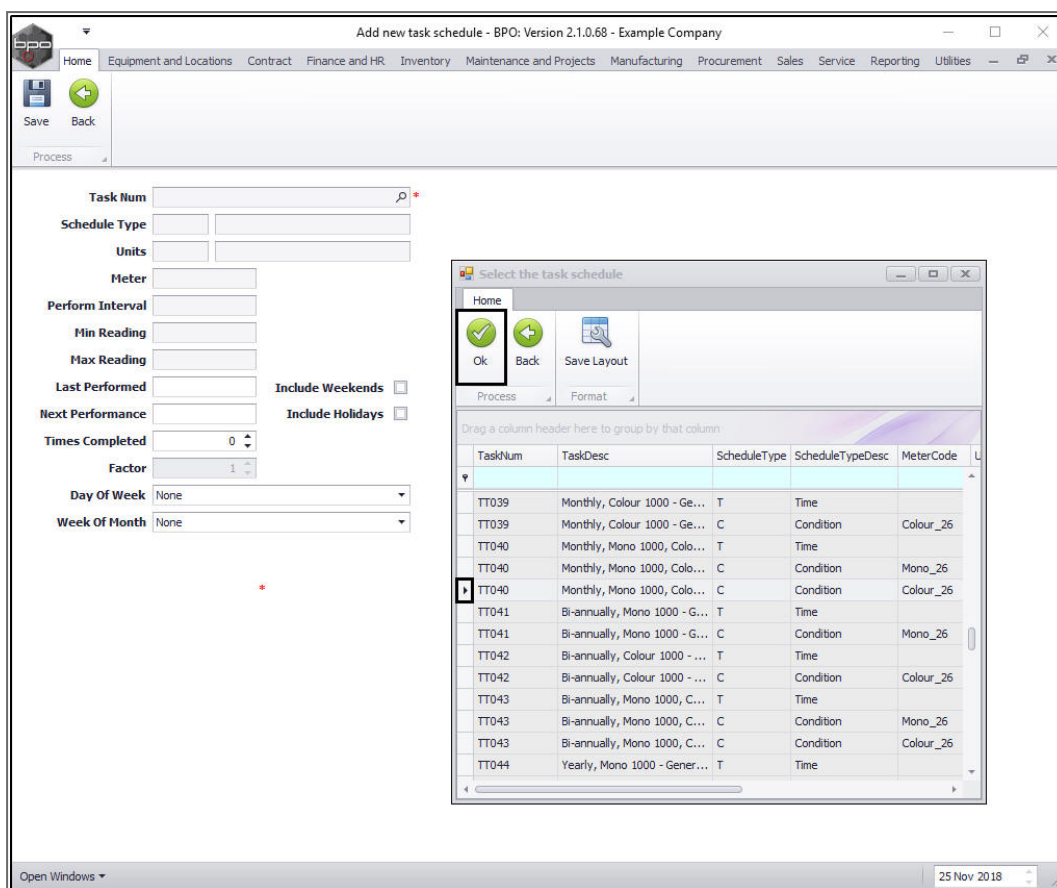
TaskNum	TaskDesc	ScheduleType	ScheduleTypeDesc	MeterCode	Units	UnitsD
3MS	3 Month Service	C	Condition	Mono_26	Copies	Co
1MMS	1 Month Machine Service	T	Time		m	Mc
1MMS	1 Month Machine Service	C	Condition	Mono_26	Copies	Co
WS	Weekly Service	T	Time		w	Wt
BathBinMaint	Bathroom Bin Maintenance	T	Time		w	Wt
AirMaint	Air fresher Maintenance	T	Time		w	Wt
Weekly	WeekMondaySoap	T	Time		w	Wt
2MS	2 month service	T	Time		m	Mc
Tier	Commercial Tier Test	T	Time		m	Mc
6MS-MFC-100	6 month service - multifun...	C	Condition	Colour_26	Copies	Co
TT0001	Daily - Call per WO	T	Time		d	Da
TT0002	Weekly - Call per WO	T	Time		w	Wt
TT0003	Monthly - Call per WO	T	Time		m	Mc
TT0004	Bi-annually - Call per WO	T	Time		2yy	Bi-
TT0005	Yearly - Call per WO	T	Time		yyyy	Ye

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ADD CONDITION-BASED TASK SCHEDULE

- Select the **row** of the **condition**-based task schedule that you wish to add to the asset.
- Click on **Ok**.



Task Num

Schedule Type

Units

Meter

Perform Interval

Min Reading

Max Reading

Last Performed

Next Performance

Times Completed

Factor

Day Of Week

Week Of Month

Include Weekends ☐

Include Holidays ☐

Process

Format

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Select the task schedule

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

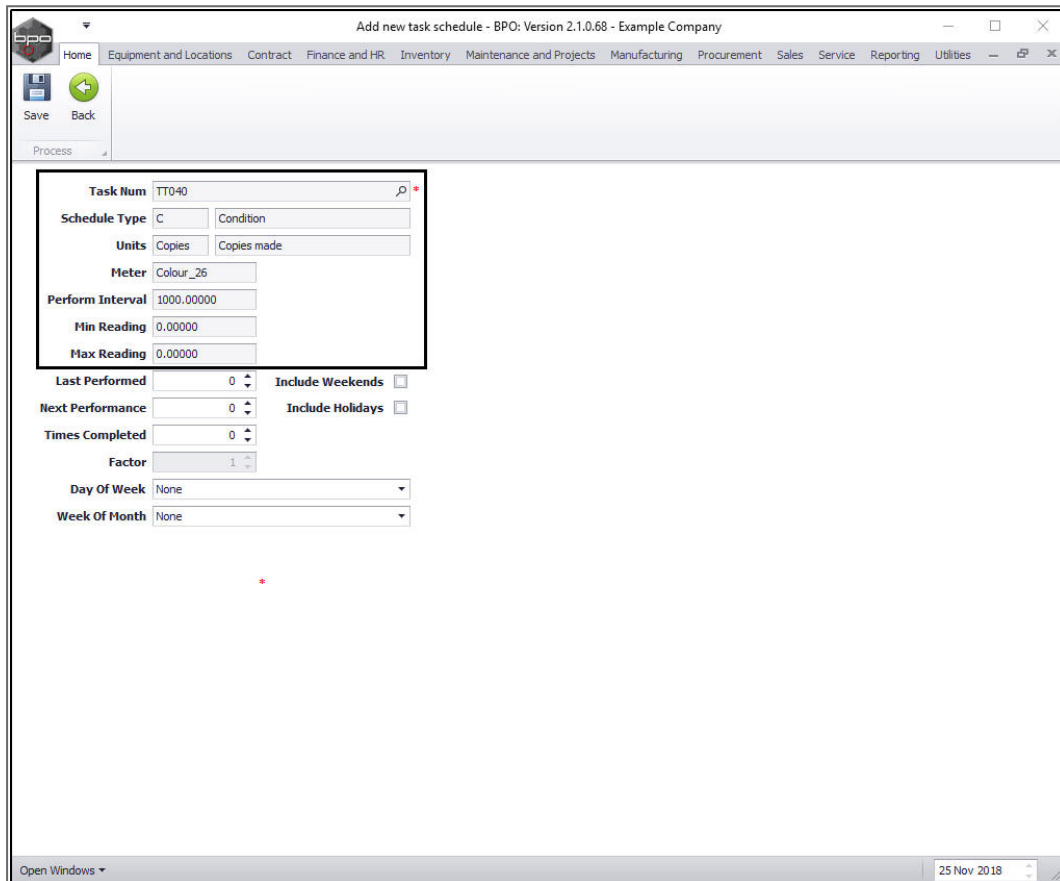
TaskNum	TaskDesc	ScheduleType	ScheduleTypeDesc	MeterCode	L
TT039	Monthly, Colour 1000 - Ge...	T	Time		
TT039	Monthly, Colour 1000 - Ge...	C	Condition	Colour_26	
TT040	Monthly, Mono 1000, Colo...	T	Time		
TT040	Monthly, Mono 1000, Colo...	C	Condition	Mono_26	
TT040	Monthly, Mono 1000, Colo...	C	Condition	Colour_26	
TT041	Bi-annually, Mono 1000 - G...	T	Time		
TT041	Bi-annually, Mono 1000 - G...	C	Condition	Mono_26	
TT042	Bi-annually, Colour 1000 - ...	T	Time		
TT042	Bi-annually, Colour 1000 - ...	C	Condition	Colour_26	
TT043	Bi-annually, Mono 1000, C...	T	Time		
TT043	Bi-annually, Mono 1000, C...	C	Condition	Mono_26	
TT043	Bi-annually, Mono 1000, C...	C	Condition	Colour_26	
TT044	Yearly, Mono 1000 - Gener...	T	Time		

ADD TASK DETAILS

- **Task Num:** This will auto populate with the task number selected in the previous step.
- **Schedule Type:** This will auto populate with the schedule type set up on the selected task, in this case 'Condition'.
- **Units:** This will auto populate with the unit type set up on the selected task. (As this is a condition-based schedule this will auto populate with **Copies - Copies Made**).
- **Meter:** This will auto populate with the meter that is linked to the selected task.
- **Perform Interval:** This will auto populate with the performance interval rate set up on the selected task, if applicable. (As this is a

condition-based schedule this will auto populate with the number of copies that will be made before the performance schedule will be triggered).

- **Min Reading:** This will auto populate with the minimum reading amount set up on the selected task, if applicable.
- **Max Reading:** This will auto populate with the maximum reading amount set up on the selected task, if applicable.



Task Num: TT040

Schedule Type: C Condition

Units: Copies Copies made

Meter: Colour_26

Perform Interval: 1000.00000

Min Reading: 0.00000

Max Reading: 0.00000

Last Performed: 0 Include Weekends: ☐

Next Performance: 0 Include Holidays: ☐

Times Completed: 0

Factor: 1

Day Of Week: None

Week Of Month: None

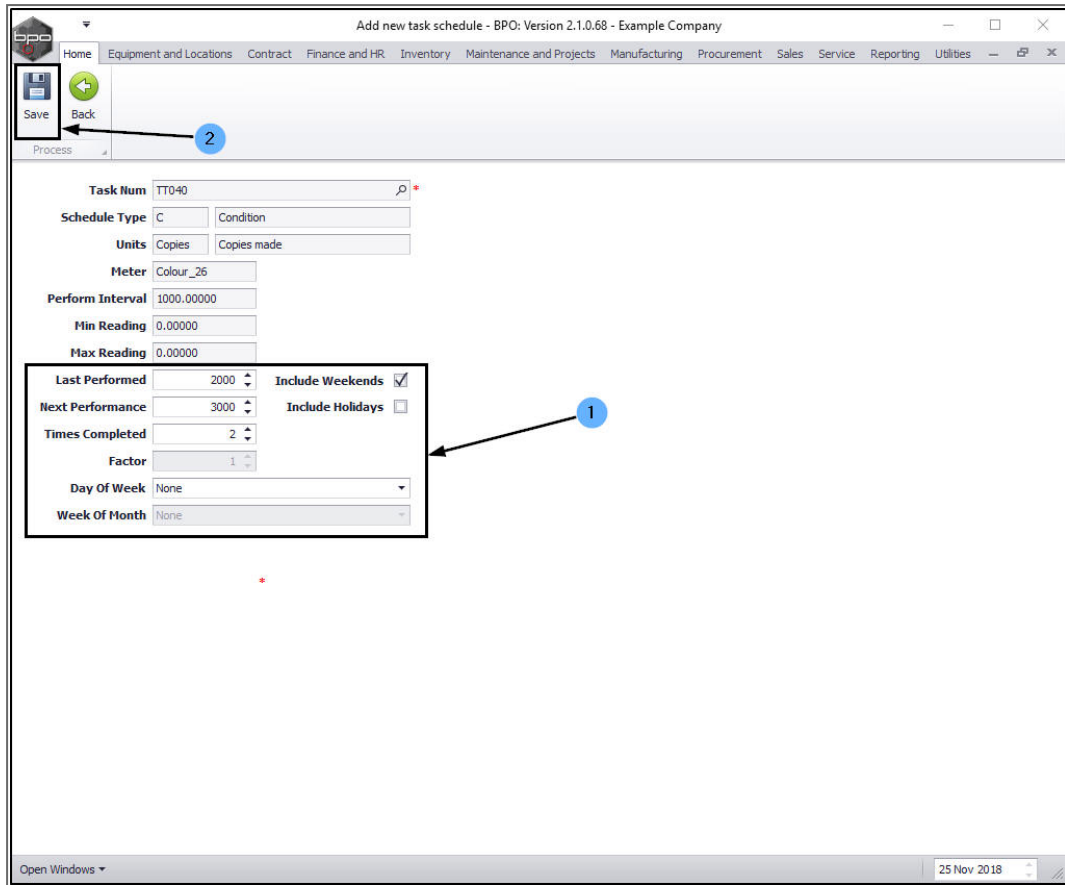
2. Performance Details

- **Last Performed:** Either type in or use the directional arrows to select the amount of the last meter reading.
- **Next Performance:** Either type in or use the directional arrows to select the amount when the next meter reading should be taken.

- **Times Completed:** Type in the number of times this task has been done.
- **Factor:** This will auto populate with 1 and is un-editable.
- **Include Weekends** Select this check box if you wish this task to be generated on a weekend. (If unselected, the task will not generate on a Weekend (as configured in Scheduling).
- **Include Holidays** Select this check box if you wish this task to be generated on a public holiday. (If unselected, the task will not generate on a Public Holiday (as configured in Scheduling).
- **Day of the Week** and **Week of the Month** For monthly tasks, if you have a preferred day for the tasks to generate, then click on the drop-down arrow and select from the menu the **Day of the Week** and **Week of the Month**.

SAVE TASK SCHEDULE

3. When you have finished adding details to this screen, click on **Save**.



Add new task schedule - BPO: Version 2.1.0.68 - Example Company

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

Save Back

Process

Task Num TT040

Schedule Type C Condition

Units Copies Copies made

Meter Colour_26

Perform Interval 1000.00000

Min Reading 0.00000

Max Reading 0.00000

Last Performed 2000 Include Weekends ☒

Next Performance 3000 Include Holidays ☐

Times Completed 2

Factor 1

Day Of Week None

Week Of Month None

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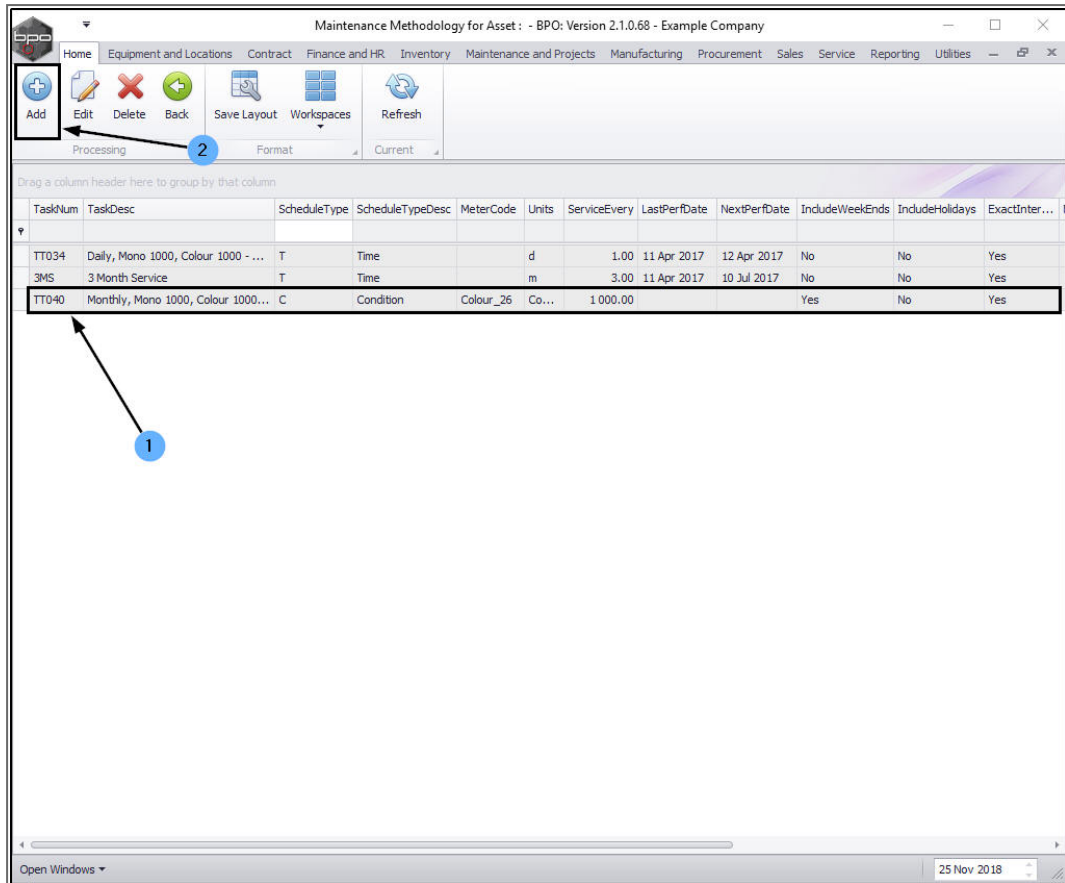
You will return to the **Maintenance Methodology for Asset:** screen.

VIEW TASK SCHEDULE

- Here you can view the new 'condition' task has now been linked to the asset.

ADD TIME-BASED TASK SCHEDULE

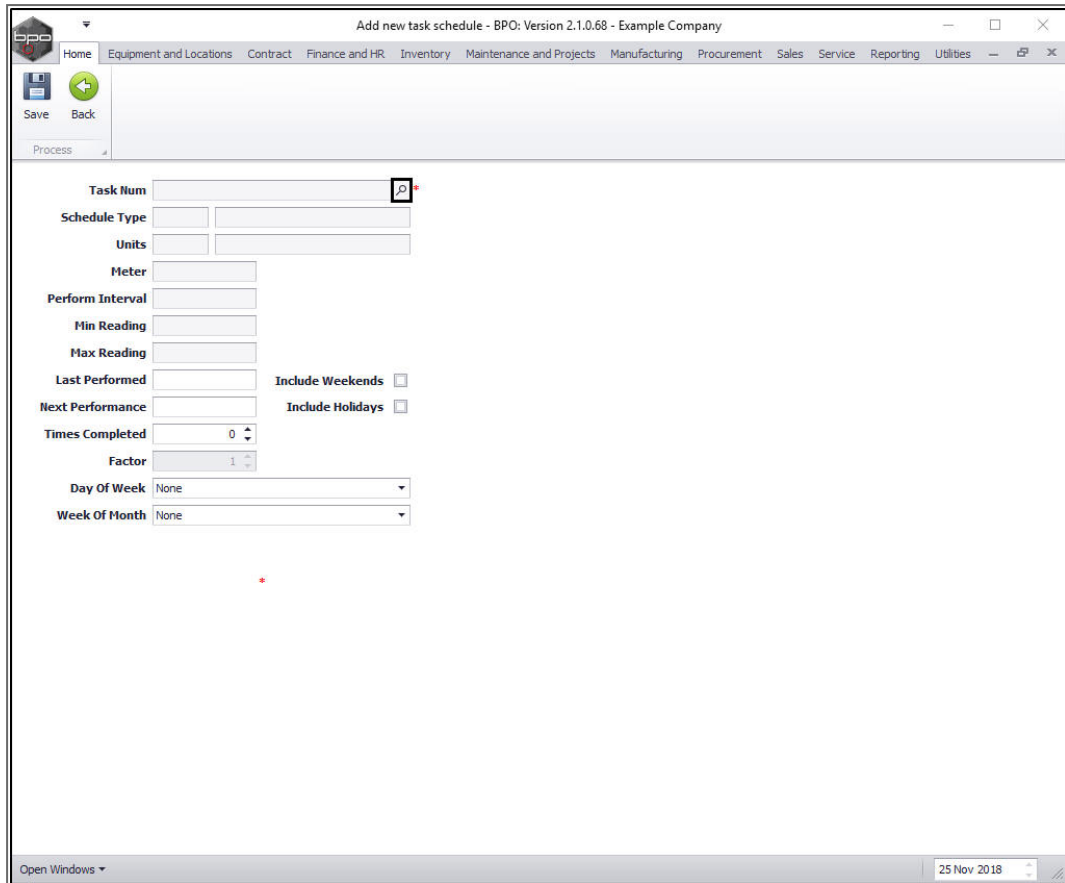
- Click on **Add**.



The **Add new task schedule** screen will be displayed.

SELECT TASK SCHEDULE

- **Task Num:** Click on the **search** button in this field.



The **Select the task schedule** pop up screen will appear.

- Select the **row** of the **'time'** task schedule that you wish to add to the asset.
- Click on **Ok**.

Add new task schedule - BPO: Version 2.1.0.68 - Example Company

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

Save Back

Process

Task Num

Schedule Type

Units

Meter

Perform Interval

Min Reading

Max Reading

Last Performed

Next Performance

Times Completed

Factor

Day Of Week

Week Of Month

Include Weekends ☐

Include Holidays ☐

Select the task schedule

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

TaskNum	TaskDesc	ScheduleType	ScheduleTypeDesc	MeterCode	Units	Ur
3MS	3 Month Service	C	Condition	Mono_26	Copies	
1MMS	1 Month Machine Service	T	Time		m	
1MMS	1 Month Machine Service	C	Condition	Mono_26	Copies	
WS	Weekly Service	T	Time		w	
BathBinMaint	Bathroom Bin Maintenance	T	Time		w	
AirMaint	Airfreshner Maintenance	T	Time		w	
Weekly	WeekMondaySoap	T	Time		w	
2MS	2 month service	T	Time		m	
Tier	Commercial Tier Test	T	Time		m	
6MS-MFC-100	6 month service - multifun...	C	Condition	Colour_26	Copies	
TT0001	Daily - Call per WO	T	Time		d	
TT0002	Weekly - Call per WO	T	Time		w	
TT0003	Monthly - Call per WO	T	Time		m	
TT0004	Bi-annually - Call per WO	T	Time		2yy	
TT0005	Yearly - Call per WO	T	Time		yyyy	

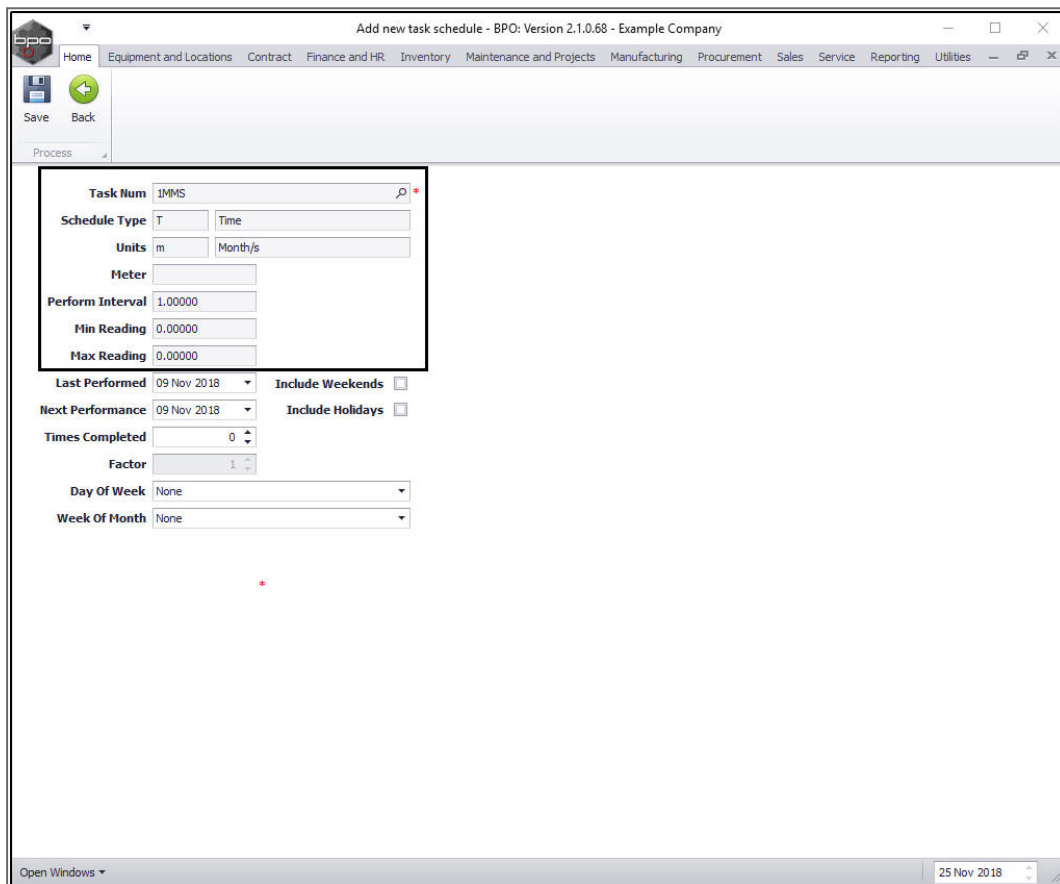
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ADD TASK DETAILS

- **Task Num:** This will auto populate with the task number selected in the previous step.
- **Schedule Type:** This will auto populate with the schedule type set up on the selected task, in this case 'Time'.
- **Units:** This will auto populate with the unit type set up on the selected task. (As this is a '**time**' based schedule this could auto populate with either **d** - days, **m** - months, or **y** - years. In this case a **1-month** service has been selected therefore the units will be in **m** - months).
- **Meter:** This will be blank and un-editable.

- **Perform Interval:** This will populate depending on the schedule type e.g. **6** (for **6** months) in this example a **1**-month machine service has been selected, so the field has populated with **1** (for **1** month).
- **Min Reading:** This will auto populate with **0** as this 'time' task schedule is not linked to meters.
- **Max Reading:** This will auto populate with **0** as this 'time' task schedule is not linked to meters.



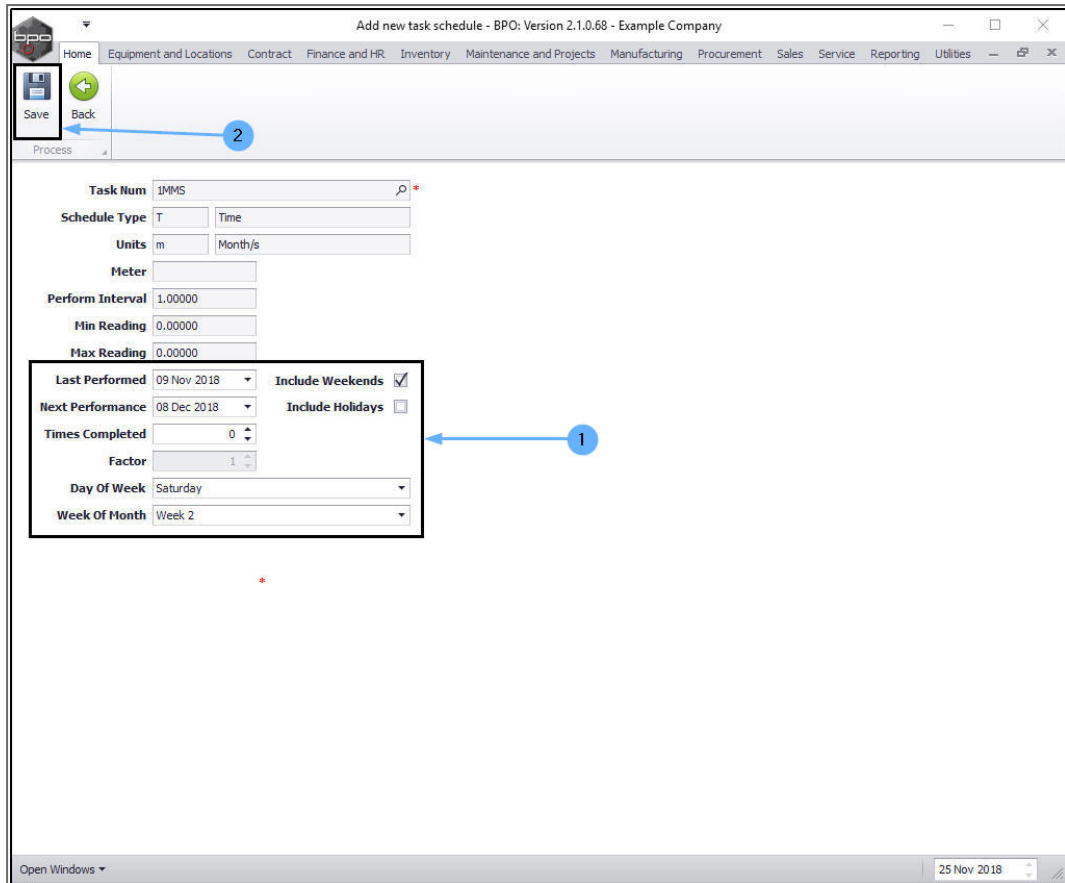
1. Performance Details

- **Last Performed:** This will populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select the date this task was last performed.

- **Next Performance:** This will populate with the current date. You can either type in or 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 the number of times this task has been done.
- **Factor:** This will auto populate with **1** and cannot be edited.
- **Include Weekends** and **Include 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 the Week** and **Week of the Month** For monthly tasks, if you have a preferred day for the tasks to generate, then click on the drop-down arrow and select from the menu the **Day of the Week** and **Week of the Month**.

SAVE TASK SCHEDULE

2. When you have finished adding details to this screen, click on **Save**.



VIEW TASK SCHEDULE

- You will return to the ***Maintenance Methodology for Asset:*** screen.
- Here you can view the new 'time' task has now been linked to the asset.

Maintenance Methodology for Asset : - BPO; Version 2.1.0.68 - Example Company

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

Add Edit Delete Back Save Layout Workspaces Refresh

Processing Format Current

Drag a column header here to group by that column

TaskNum	TaskDesc	ScheduleType	ScheduleTypeDesc	MeterCode	Units	ServiceEvery	LastPerfDate	NextPerfDate	IncludeWeekEnds	IncludeHolidays	ExactInter...
TT034	Daily, Mono 1000, Colour 1000 - ...	T	Time		d	1.00	11 Apr 2017	12 Apr 2017	No	No	Yes
3MS	3 Month Service	T	Time		m	3.00	11 Apr 2017	10 Jul 2017	No	No	Yes
TT040	Monthly, Mono 1000, Colour 1000...	C	Condition	Colour_26	Co...	1 000.00			Yes	No	Yes
1MMS	1 Month Machine Service	T	Time		m	1.00	09 Nov 2018	08 Dec 2018	Yes	No	Yes

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