

MAINTENANCE

TASKS - LINK A SHADOW TASK

A shadow task will <u>not</u> generate if it is due at the same time as the task that has been linked to it.

For example: A machine might have a **6** month *service*, and a *general inspection* due every **3** months. It may happen that the general inspection is performed during a service, in which case the inspection task is not necessary. The 3 month general inspection will be a **shadow task** to the 6 month service.

Ribbon Access: Maintenance / Projects > Tasks



- 1. The *Tasks* list screen will be displayed.
- 2. Click on the *row* of the task you wish to *link* a *shadow task* to.
- 3. Click on the *Shadow Tasks* tile.



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	TT058	Weekly, Mo	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	No
	TT059	Weekly, Col	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	No
Shadow Tasks	TT060	Weekly, Mo	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	No
	TT061	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	No
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	TT064	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	No
	TT065	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	No
	TT066	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	No
	TT067	Yearly, Mon	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	No
	TT068	Yearly, Colo	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	No
	TT069	Yearly, Mon	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	No
	TT070	2 Daily - Cal	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	Yes
	TT071	2 Weekly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	Yes
	TT072	2 Monthly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	Yes
	TT073	2 Yearly - C	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	Yes
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Open Windows 🕶									User : Ju	landaK 17/05/	2021 Version	: 2.5.0.0 Ex	ample Company	v2.5.0.0

- 4. The *Shadow Tasks* list screen will be displayed.
- 5. Any tasks that have already been linked will be displayed in the data grid.

ADD A SHADOW TASK

6. Click on **Add**.







- 7. The *Shadow Task Maintain* screen will be displayed.
- 8. The *left panel* lists all the tasks that you can select from.
- The *right panel* contains the *Shadow Tasks* where the selected task(s) will be listed.
- Click in the *row(s)* of the task(s)¹ you wish to link as shadow task(s).
 Drag and drop the task(s) into the Shadow Tasks panel
- 11. The selected task(s) will now be listed in the *Shadow Tasks* panel.
 - Continue selecting and moving tasks to the shadow tasks panel as required.

Note that you can remove a task item from the Shadow Task grid, by *dragging and dropping* the task back to the task list column, if it is not required.

¹To select more than one Task item, hold down the Control Key on your keyboard and click on the row of each task item that you wish to link to the task. While hold-ing down the Control key, drag the files to the Shadow Tasks grid.



SAVE THE SHADOW TASK

12. When done, click on *Save*.

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3MS	SRV	3 Month Service			· · >									
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BathBinMaint	SRV	Bathroom Bin Maintenance												
T001	SRV	Daily - Call per WO												
T042	SRV	Bi-annually, Colour 1000 - Generate Project												
TEST001	SRV	Test Task												
Tier	SRV	Commercial Tier Test												
TT0001	SRV	Daily - Call per WO												
TT002	SRV	Weekly - Call per WO												
TT003	SRV	Monthly - Call per WO												
TT004	SRV	Bi-annually - Call per WO												
TT005	SRV	Yearly - Call per WO												
TT006	SRV	Mono 1000 - Call per WO												
TT007	SRV	Colour 1000 - Call per WO												
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TT009	SRV	Daily, Mono 1000 - Call per WO												
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- 13. When you receive the *Shadow Tasks* message confirming that;
 - The Shadow Task for Task [task number] have been saved.
- 14. Click on *OK*.



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2MS	SRV	2 month service									
3MS	SRV	3 Month Service									
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BathBinMaint	SRV	Bathroom Bin Maintenance	Shadow Tasks	12	×]					
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TT004	SRV	Bi-annually - Call per WO									
TT005	SRV	Yearly - Call per WO									
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- 15. You will return to the *Shadow Tasks* list screen.
- 16. The shadow task(s) that you have linked to the task will now display in the task data grid.
- 17. Click on *Back* to return to the Tasks list screen.



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EDIT THE SHADOW TASK

- 1. From the *Shadow Tasks* list screen,
- 2. Click on *Edit*.







- 3. The *Shadow Task Maintain* screen will be displayed.
- 4. You can link additional tasks to the Shadow Task panel.

SAVE THE SHADOW TASK

5. When you have finished linking the required shadow task(s), click on *Save*.



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3MS	SRV	3 Month Service		AirMaint	SRV	Airfreshner Maintenance					
BathBinMaint	SRV	Bathroom Bin Maintenance									
T001	SRV	Daily - Call per WO									
T042	SRV	Bi-annually, Colour 1000 - Generate Project									
TEST001	SRV	Test Task									
Tier	SRV	Commercial Tier Test									
TT0001	SRV	Daily - Call per WO									
TT002	SRV	Weekly - Call per WO									
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TT006	SRV	Mono 1000 - Call per WO									
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- 6. When you receive the *Shadow Tasks* message to confirm that;
 - The Shadow Task [task number] have been saved.
- 7. Click on OK.

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	2MS	SRV	2 month service												
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- 8. You will return to the *Shadow Tasks* screen where you can *view* the additional shadow tasks that were added for this Task.
- 9. Click on *Back* to return to the *Tasks* list screen.

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UNLINK / DELETE A SHADOW TASK

- 1. From the *Shadow Tasks* screen,
- 2. Click on the *row* of the shadow task you wish to remove from the list.
- 3. Click on *Delete*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Delete*.





4. When you receive the *Delete Shadow Task* message to confirm;

• Are you sure you want to delete this Shadow Task?

- 5. Click on **Yes** if you are certain about your selection.
 - Click on **No** to ignore the request and to leave the shadow task linked to the task.



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- 6. Next you will receive a message to confirm that;
 - Shadow Task Deleted.
- 7. Click on OK.

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- 8. The *Shadow Tasks* screen will be updated and the Shadow Task you have removed will no longer be visible in the task data grid.
- 9. Click on *Back* to return to the *Tasks* list screen.

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