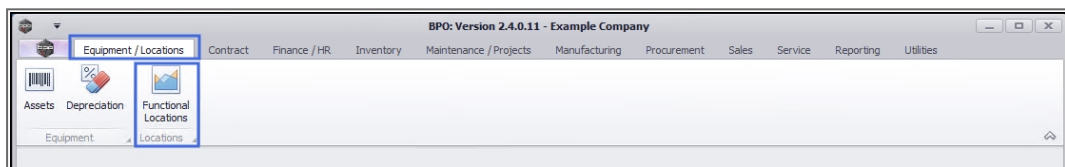


We are currently updating our site; thank you for your patience.

LOCATIONS

FUNCTIONAL LOCATIONS – MAINTENANCE METHODOLOGY (TASK SCHEDULE)

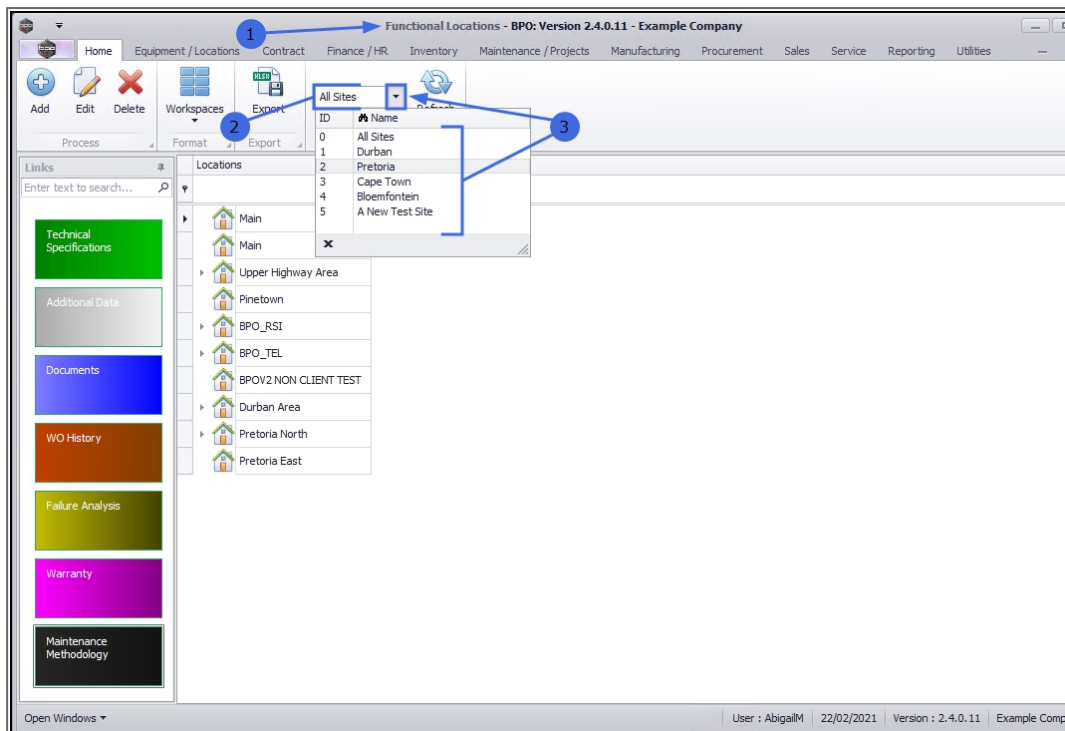
Ribbon Access: Equipment and Locations > Functional Locations



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

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

MAIN LOCATION

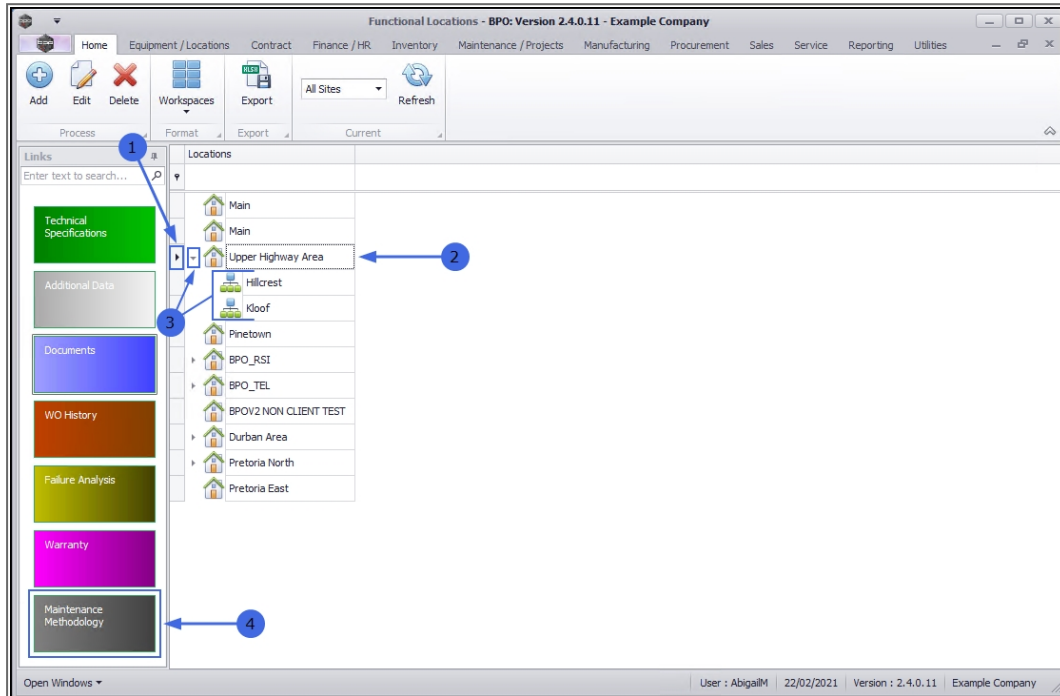
2. If the Maintenance Methodology is to be linked to a **main** location, select the **row** of that main location. In this example, **Upper Highway Area** is a main location.

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.

VIEW MAINTENANCE METHODOLOGY

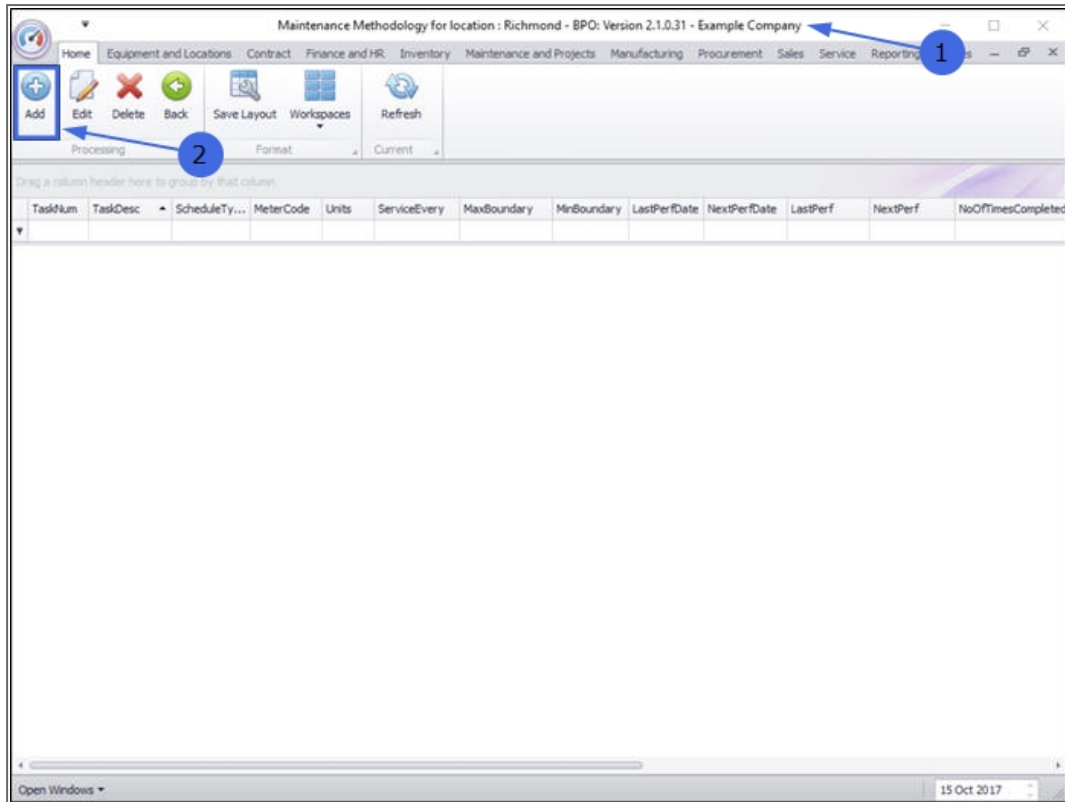
1. When you have selected the right location, click on the **Maintenance Methodology** tile.



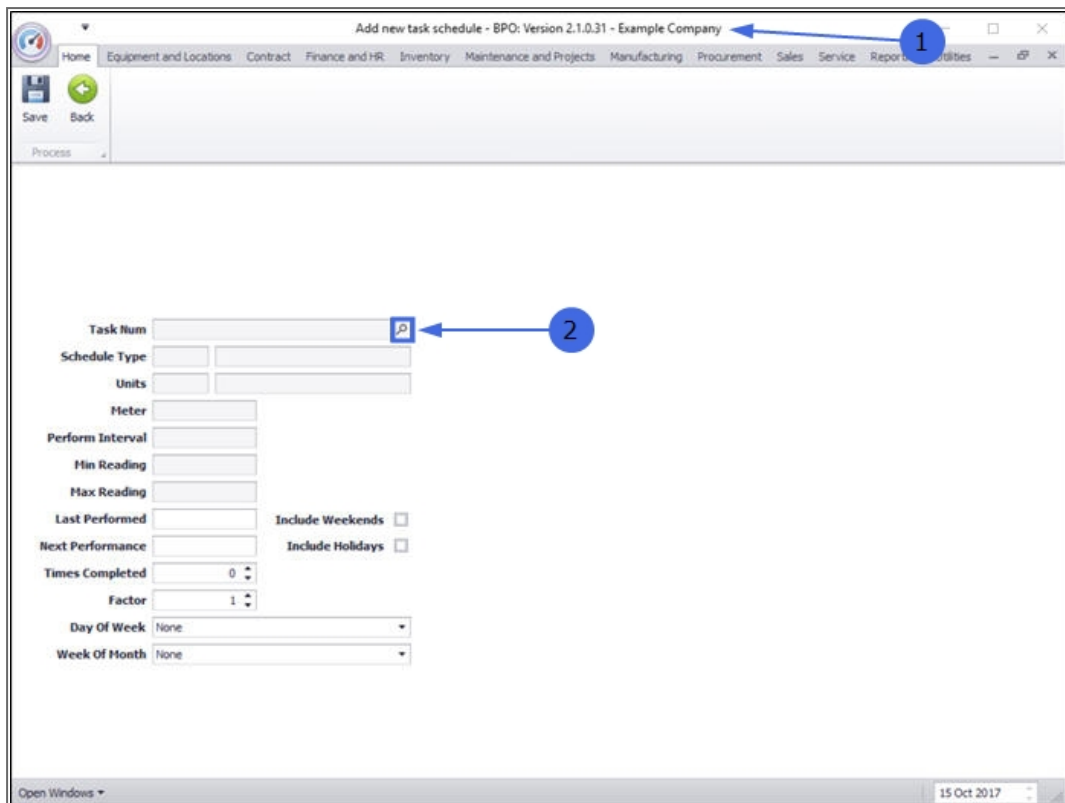
1. The **Maintenance Methodology for location: []** screen will open.

ADD NEW TASK SCHEDULE

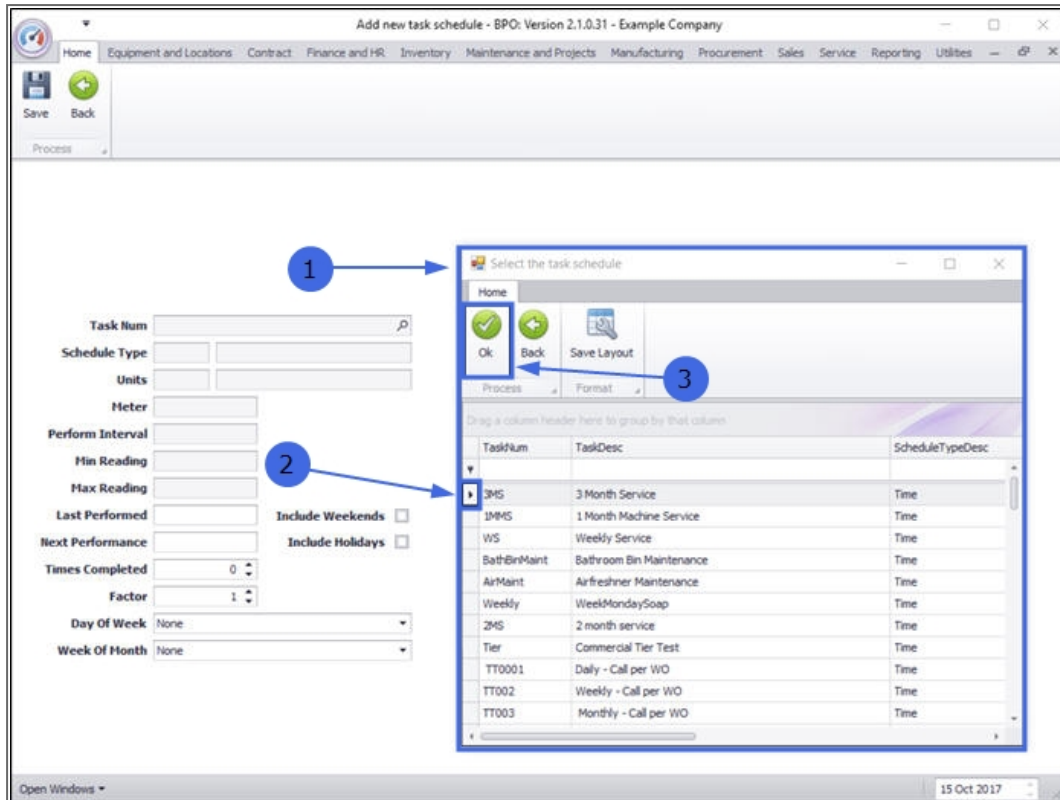
1. Click on **Add**.



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



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**.



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

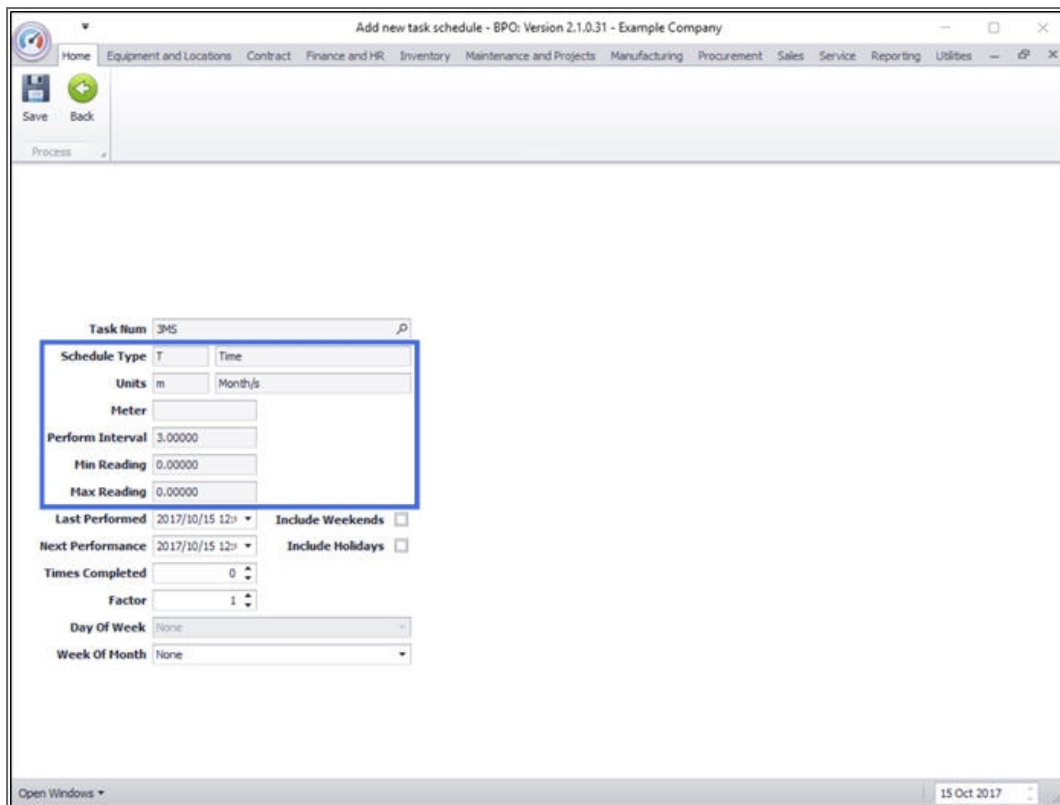
Drag a column header here to group by that column

TaskNum	TaskDesc	ScheduleTypeDesc
3MS	3 Month Service	Time
1MMS	1 Month Machine Service	Time
WS	Weekly Service	Time
BathBinMaint	Bathroom Bin Maintenance	Time
AirMaint	Airfreshner Maintenance	Time
Weekly	WeekMondaySoap	Time
2MS	2 month service	Time
Tier	Commercial Tier Test	Time
TT0001	Daily - Call per WO	Time
TT002	Weekly - Call per WO	Time
TT003	Monthly - Call per WO	Time

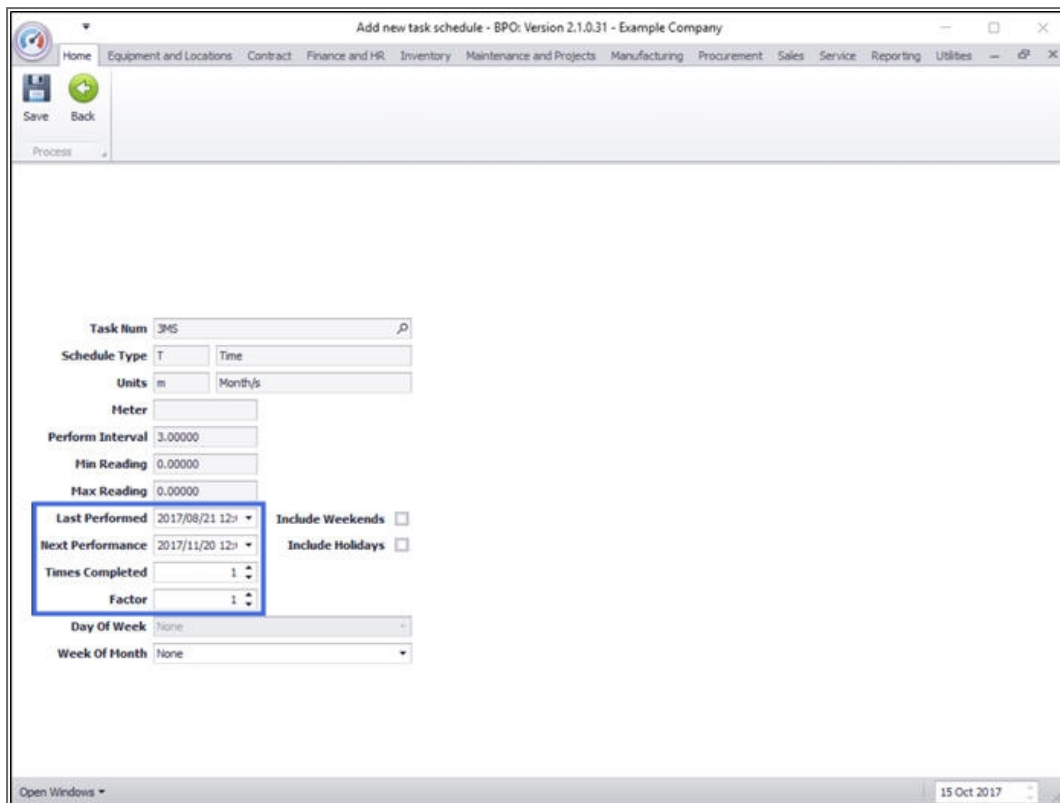
Open Windows 15 Oct 2017

TASK SCHEDULE DETAILS

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



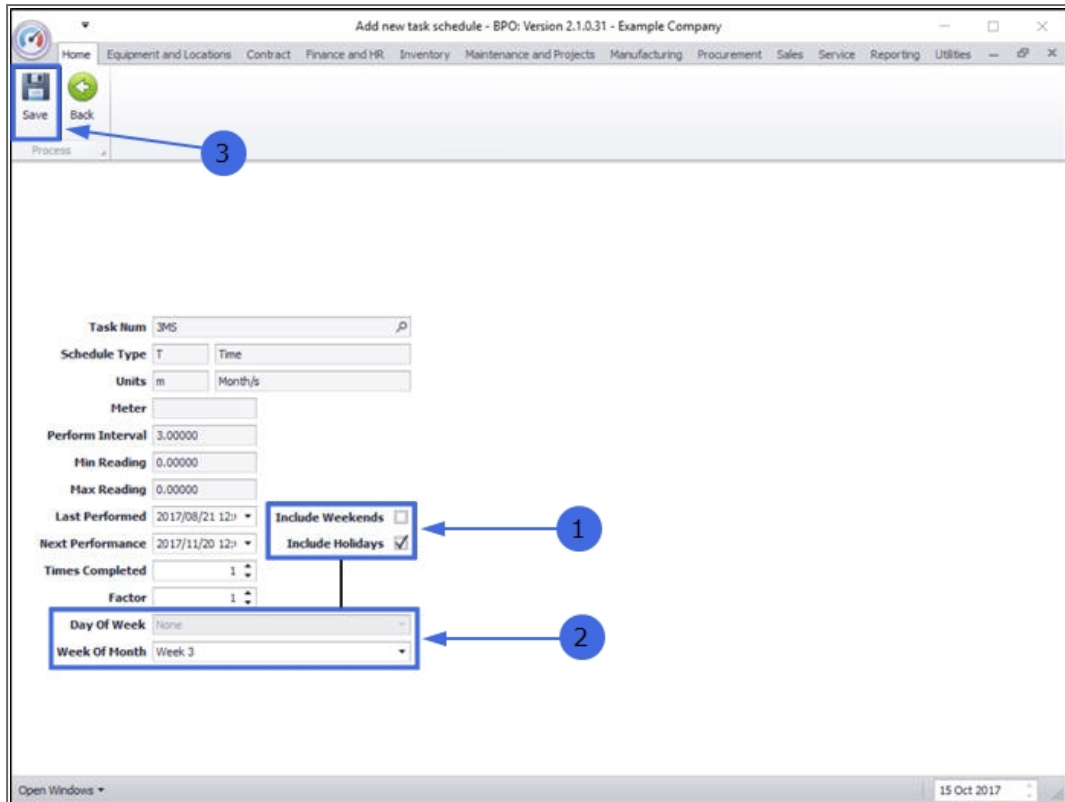
- **Last Performed:** Click on the drop-down arrow and use the calendar function to select the date this task was last performed.
- **Next Performance:** Click on the drop-down arrow and use the calendar function to select the date this task will next be due.
- **Times Completed:** Type in or use the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



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**.



Task Num: 3MS

Schedule Type: T Time

Units: m Month/s

Meter:

Perform Interval: 3.00000

Min Reading: 0.00000

Max Reading: 0.00000

Last Performed: 2017/08/21 12:00

Next Performance: 2017/11/20 12:00

Times Completed: 1

Factor: 1

Day Of Week: None

Week Of Month: Week 3

Include Weekends: ☐

Include Holidays: ☒

VIEW NEW LOCATION TASK SCHEDULE

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

Maintenance Methodology for location : Richmond - BPO: Version 2.1.0.31 - 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	ScheduleTypeDesc	Units	ServiceEvery	MaxBoundary	MinBoundary	LastPerfDate	NextPerfDate	IncludeWeekEnds	IncludeHolidays	WeekOfMonths	NoOffTime
3MS	3 Month Service Time		m	3.00	0.00	0.00	21 Aug 2017	20 Nov 2017	No	Yes		3

Open Windows 15 Oct 2017

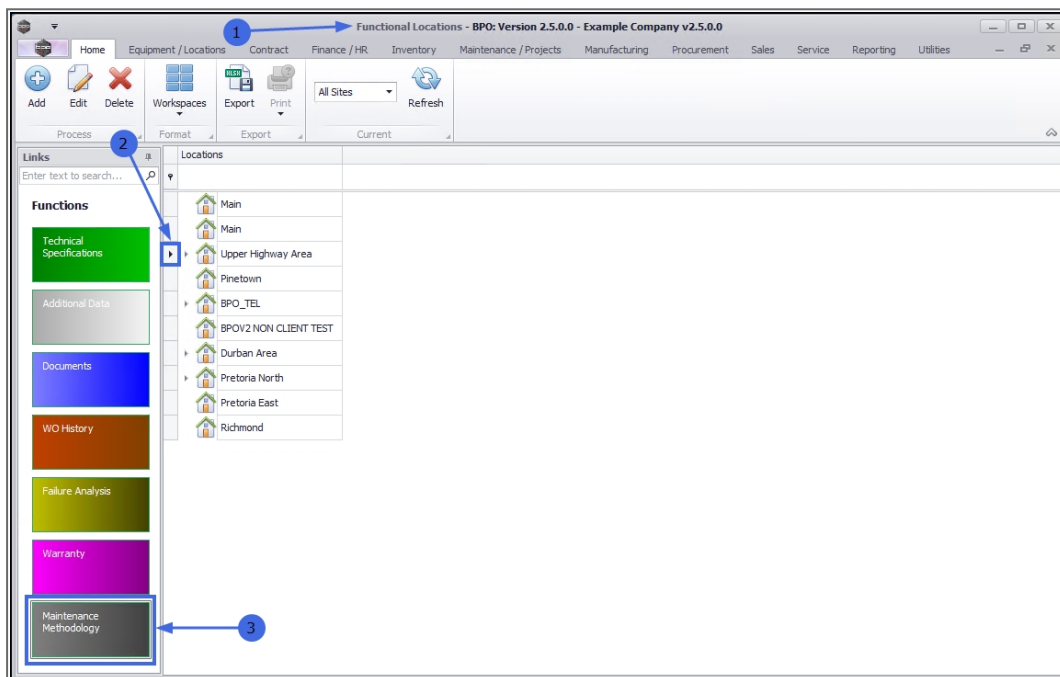
EDIT LOCATION TASK SCHEDULE

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.



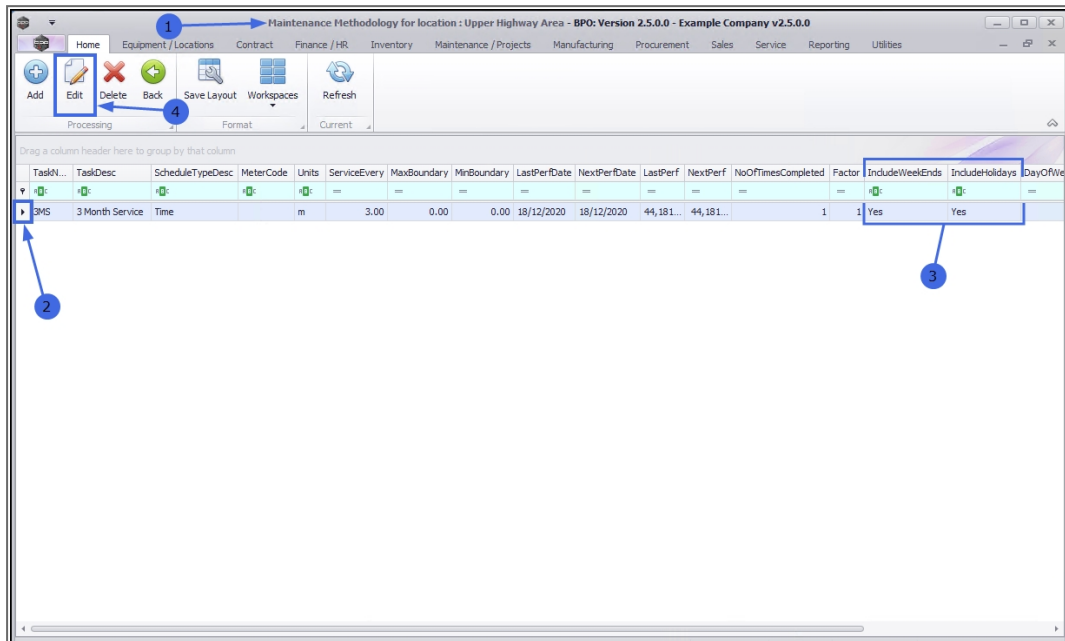
1. The Maintenance **Methodology for location: []** screen will open.

SELECT TASK

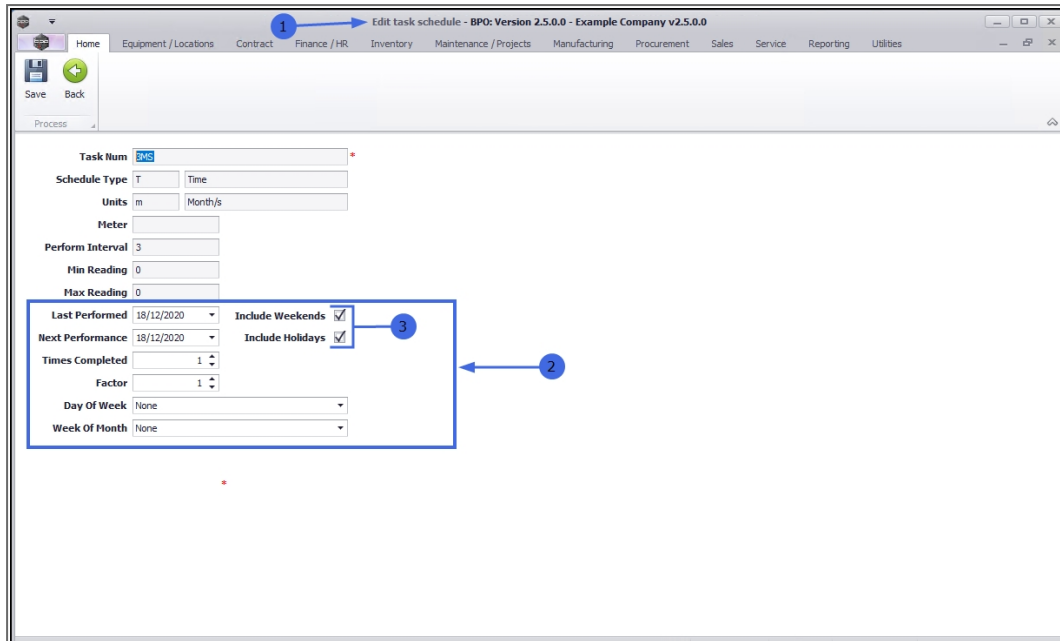
2. If there is more than one row in the data grid, select the **row** of the task where you wish to make changes.
3. Note that this task can currently be performed on **weekends** and **public holidays**. This will be edited in the next screen.

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.



1. Edit task schedule - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Task Num: SMS

Schedule Type: T Time

Units: m Month/s

Meter:

Perform Interval: 3

Min Reading: 0

Max Reading: 0

Last Performed: 18/12/2020

Next Performance: 18/12/2020

Times Completed: 1

Factor: 1

Day Of Week: None

Week Of Month: None

Include Weekends: ☒

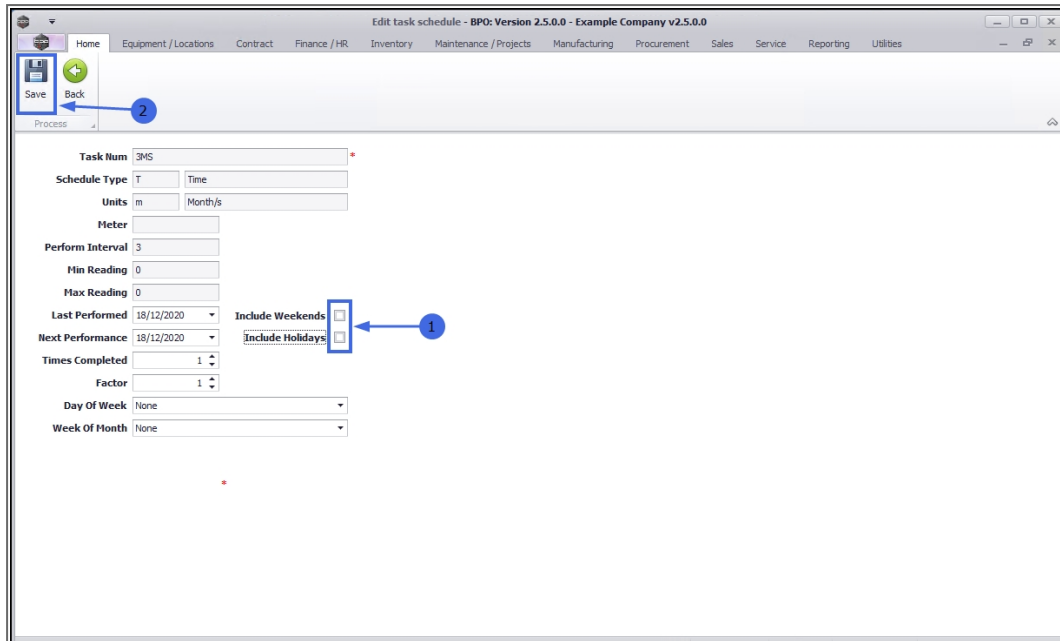
Include Holidays: ☒

1. Edit the required fields.

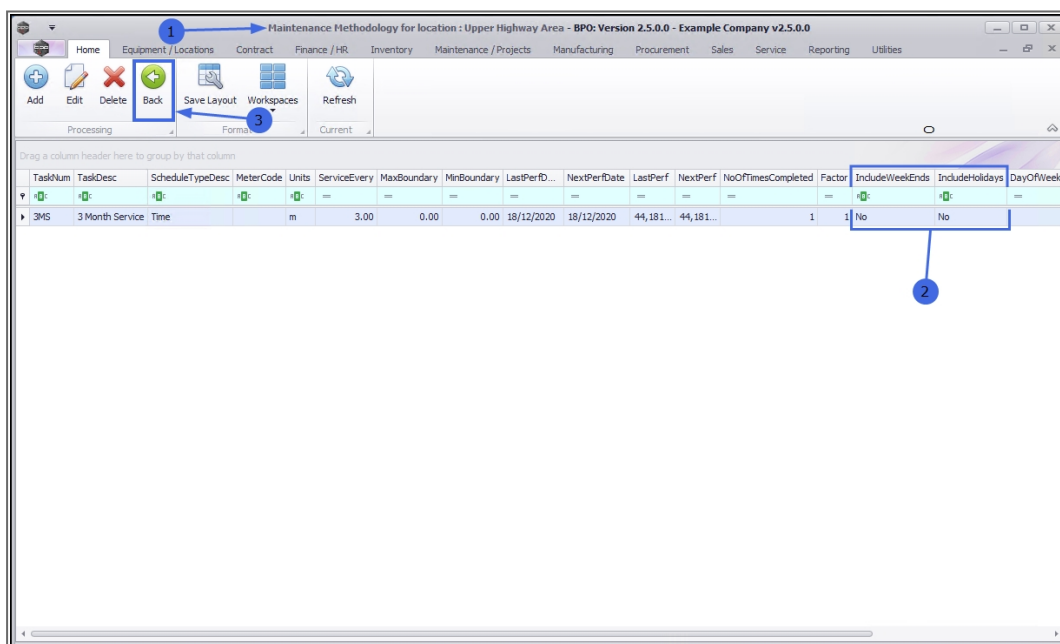
- In this example, both the **Include Weekends** and **Include Holidays** check boxes have now been deselected, indicating that tasks can no longer be performed on those days if the scheduled task date should fall on either a Saturday or Sunday or on a public holiday.

SAVE CHANGES

2. Click on **Save**.



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.



TaskNum	TaskDesc	ScheduleTypeDesc	MeterCode	Units	ServiceEvery	MaxBoundary	MinBoundary	LastPerfDate	NextPerfDate	LastPerf	NextPerf	NoOfTimesCompleted	Factor	IncludeWeekEnds	IncludeHolidays	DayOfWeek
3MS	3 Month Service	Time		m	3.00	0.00	0.00	18/12/2020	18/12/2020	44,181...	44,181...	1	1	No	No	

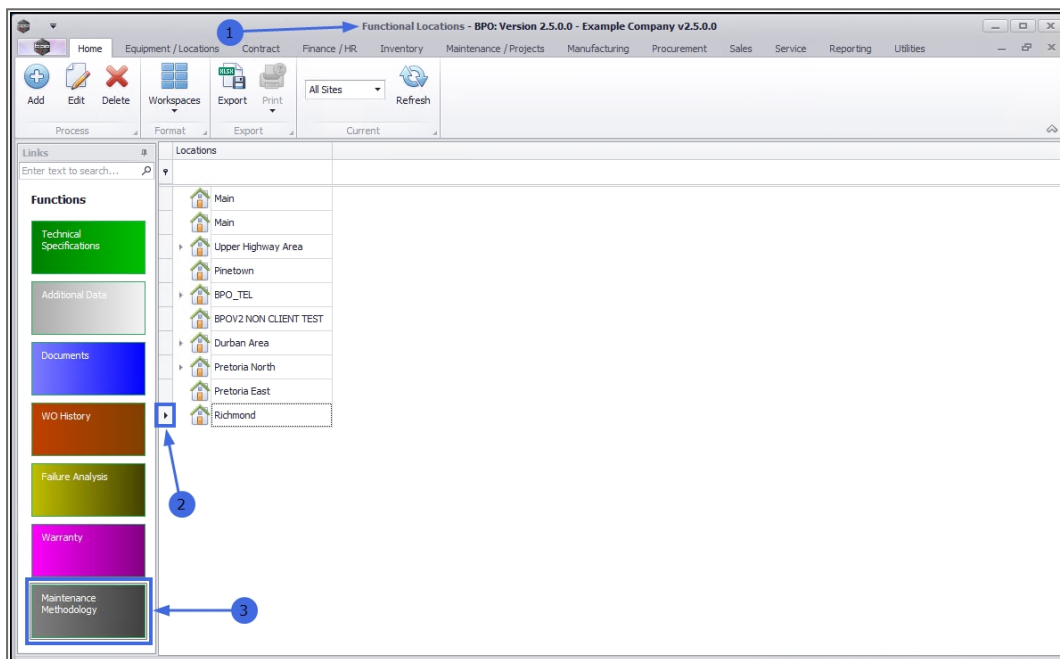
DELETE TASK SCHEDULE

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.



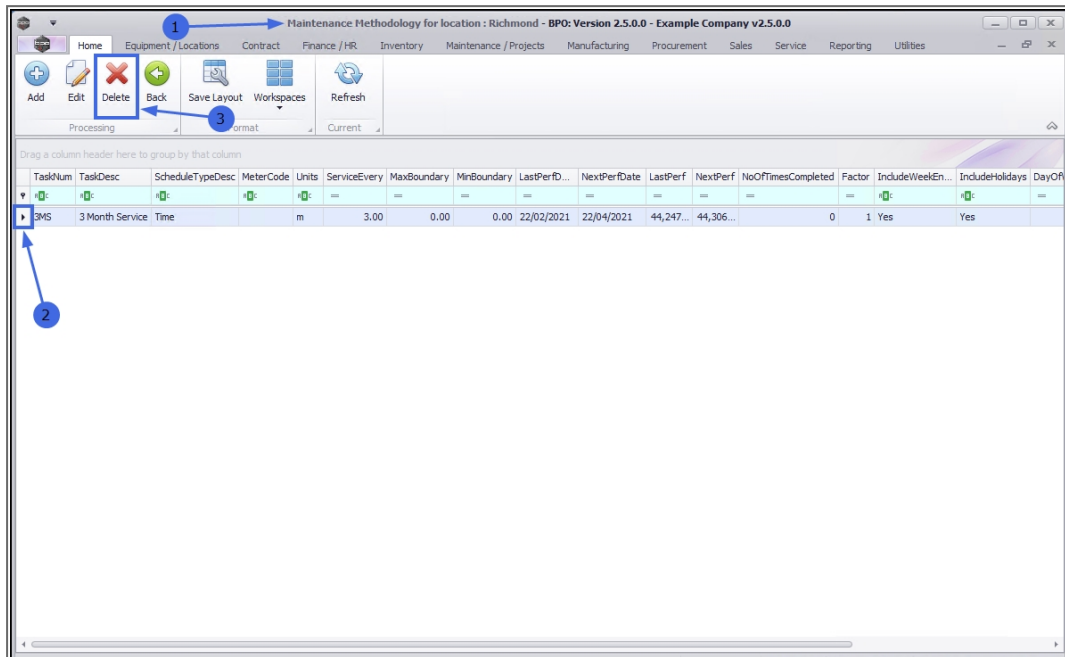
1. The Maintenance **Methodology for location: []** screen will open.

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.

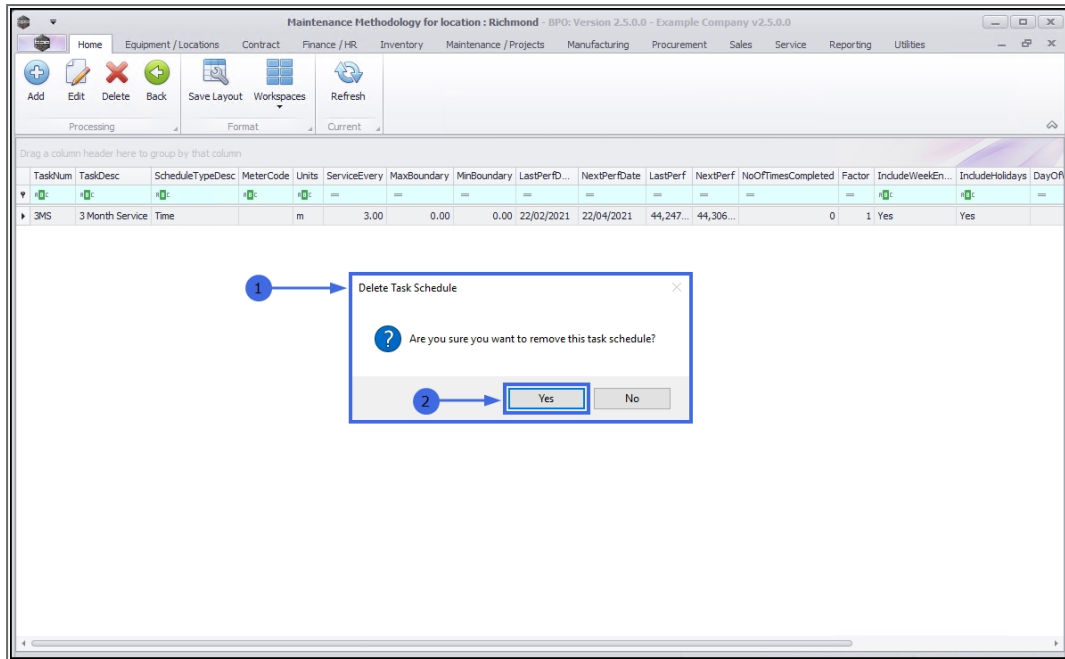
DELETE TASK

3. Click on **Delete**.



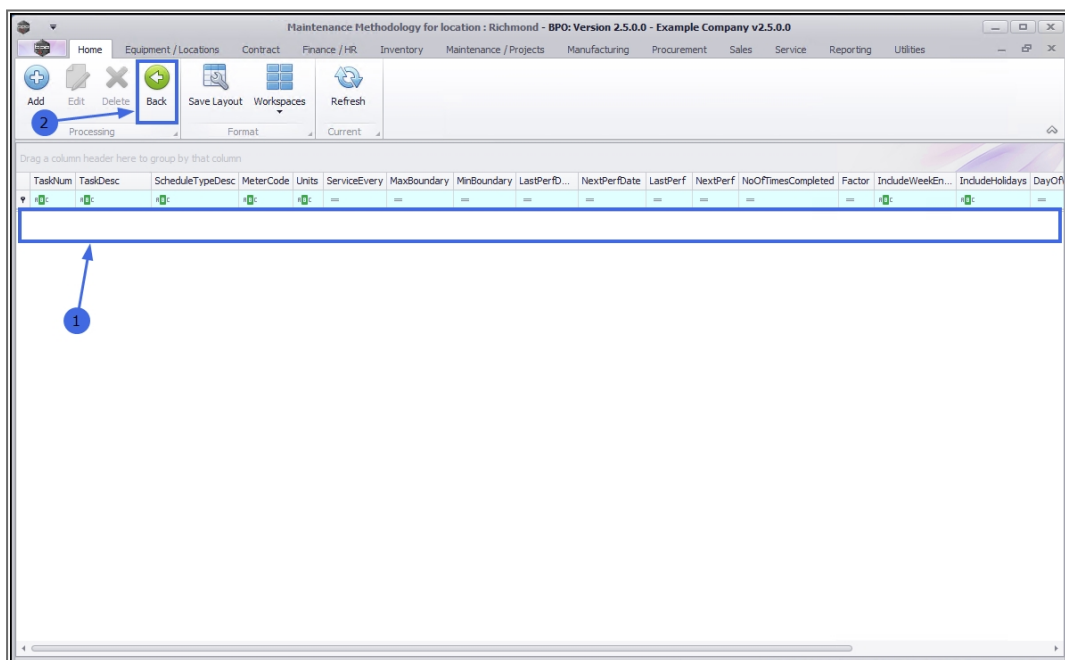
CONFIRM DELETION

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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