MAINTENANCE

GENERATE TASKS

The task generator will create work orders for tasks that are due, up until the **Generate Until**specified.

Depending on the task setup, the system will generate the work orders as follows:

- Stand-alone work order[1] which can manually be linked to an existing project or call, if required.
- Create a call and underlying work order[2].
- Create a project and underlying work order[3].

The date of the work order generated will be the scheduled **due date** of the task . (The Maintenance Radar will set the call and work order date to the date run).

This may differ depending on;

- whether the task is configured to allow tolerance and a tolerance percentage is set, or
- if the asset / location generation methodology is configured to not include public holidays and / or weekends or specifies a specific day of the week, or a specific week of the year.

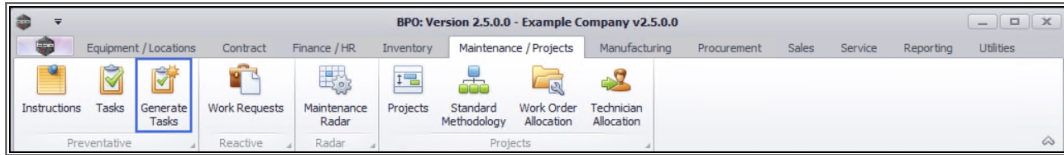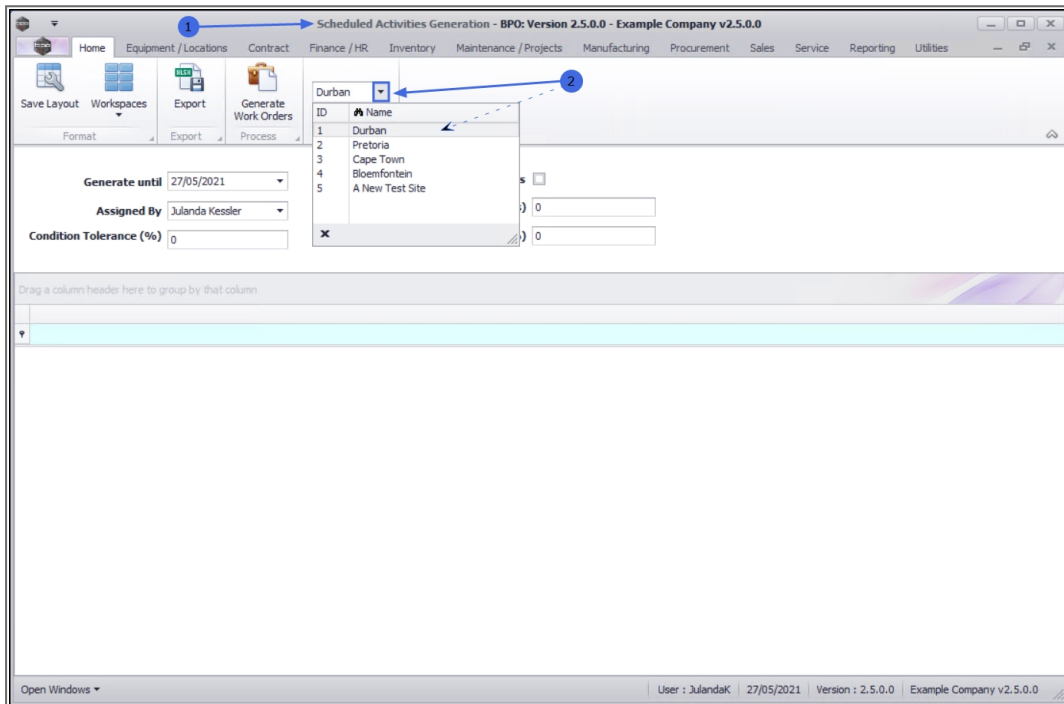**Ribbon Access:** *Maintenance / Projects > Generate Tasks*

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[1]Create Project on Generation and Create Call flags not set.
[2]Create Call flag is set.
[3]Create Project on Generation flag is set.

1. The *Scheduled Activities Generation* screen will be displayed.
2. Select the *Site* you wish to generate scheduled activities for by clicking on the down *arrow* to display the site list.
   - The example has *Durban* selected.

SCHEDULE THE ACTIVITIES

- **Generate until:** Click in the text box to *type* in , or click on the down *arrow* to use the calendar function to select the date this scheduled activity generation needs to continue until, e.g. today, a week, month or year from now.

- **Assigned By:** This field will auto populate with the person currently logged on to the system. Click on the down *arrow* to select an alternative employee from the list, if required.

- **Condition Tolerance**[1] **(%):** Click in the text box to *type* in the tolerance (in percentage value) within which the task can be performed, without affecting the next due execution point. This can be left as 0 (zero).

- **Only Contract Items:** Click in the *check box* if you wish this scheduled activity generation to only apply to contract items.

- **Extrapolation Period (days):** Click in the text box to type in the *number of days* into the future to generate time-based tasks. When it is set to 0 (zero), tasks will be generated up until the current day. Set a value to generate future time-based tasks, e.g. prepare and schedule maintenance required for the week ahead.

- **Process Tolerance (%)**[2]**:** Click in the text box to *type* in the tolerance (in percentage value) within which the task can be performed without affecting the next due execution point. This field can be left as 0 (zero).
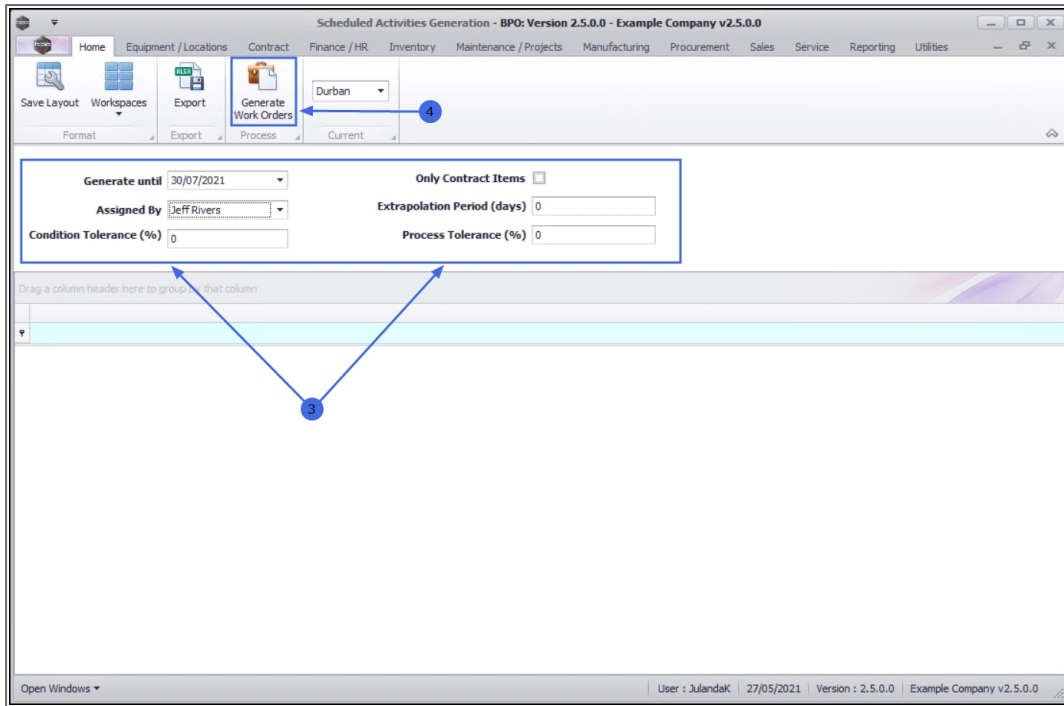
GENERATE WORK ORDERS

4. Click on the *Generate Work Orders* button.

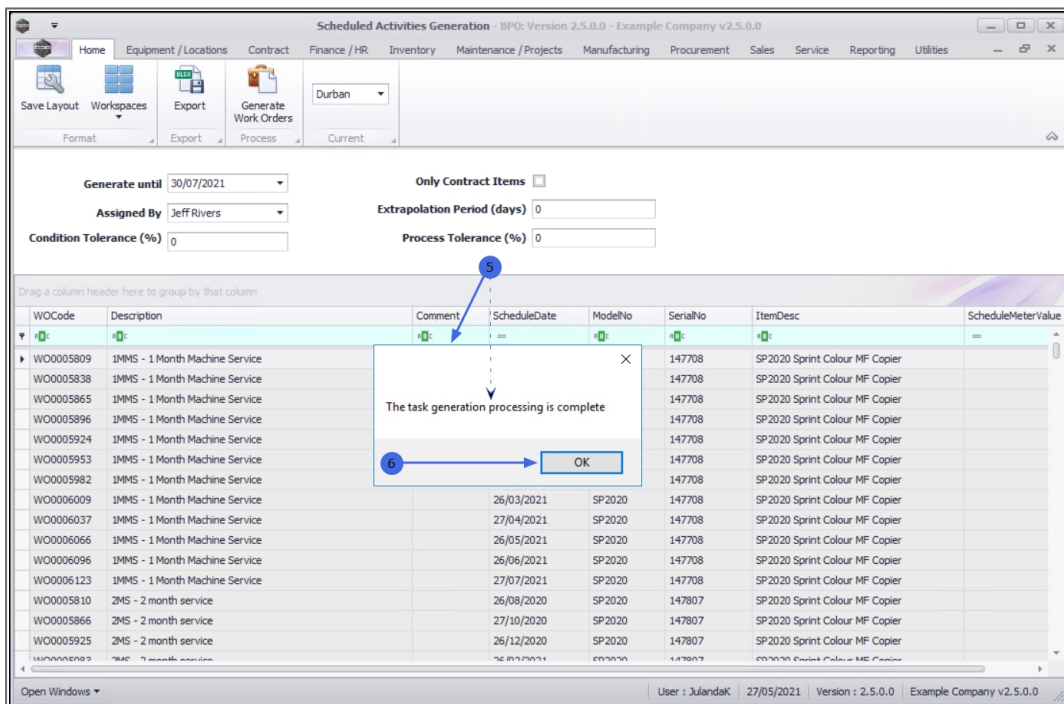
[1]The condition tolerance is related to the maintenance methodology for meter-based tasks.
[2]The Process Tolerance is related to the maintenance methodology for Time Based tasks.

5. When you receive the message confirming that;

    • *The task generation processing is completed.*

6. Click on *OK*.

7. The generated list of tasks with Work Orders can be viewed in the scheduled activities grid.

> ✎ *Note* that one work order will be created for each task that has not yet been generated, up until (and including) the date selected.

EXPORT TO MICROSOFT EXCEL

8. Click on *Export* to export the list of scheduled activities to a Microsoft Excel Spreadsheet.

9. When you have completed the Task Generation, click on *Close*.

Related Topics

- Edit Work Order
- Link a Work Order to a current Project
- Link a Work Order to a new Project
- Link a Work Order to a Call

- [Work Order Allocations](#)
- [View task generated Project](#)
- View task generated Call

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