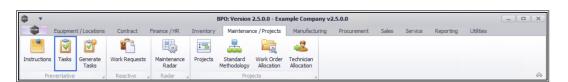


# MAINTENANCE

# **TASKS - GENERATION METHODOLOGY**

### (Task Interval/Schedule Definition)

Ribbon Access: Maintenance / Projects > Tasks



- 1. The *Tasks* listing screen will be displayed.
- 2. Click on the *row* of the task you wish to create a schedule definition for.
- 3. Click on *Edit*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Edit*.



-	Home	Equip	ment /	Locations	Contract Fi		Inventor		aintenance / F	) - Example Con Trojects Manu			ales Serv	ice Reporting	Utilities	_ 2	
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	ndows 🕶										Uner	- Schenderte La de	105 10004	Version : 2.5.0.0	Duranda Car	mpany v2.5.0.(	

4. The *Edit Task* screen will be displayed.

# **ADD SCHEDULE DEFINITION**

- 5. *Expand* the Schedule Definition panel until all the columns can be viewed. This will make it easier to work with.
- 6. *Right click* anywhere in the new row to display the *Process* menu list.
- 7. Click on *Schedule Definition* Add new Schedule Definition.



\$ • 4	Edit Task - BPO: Version 2.5.0.0 - Example Company v2.5.0.0	_ <b>D</b> X
Home Equipment / Locations Contrac	t Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities	- 🗗 X
Save Back Processing Format Task Humber TT09MCS	Priority 2 2	⇔ BOM Details ₽ □
Task Description 6 Month Machine Clean and Se *	Duration (hrs) 3	BOMCode Des
-		*
Person Responsible         Belinda Sharman         •           Work Order Type         Scheduled Maintenance         •	Down Time (hrs) 3 * Task Type Dupicate *	BOM Details # BOMCode Des *
Task Class Service	Create Project Applies to all sub	
In Service Task	on generation components	
Is Overhaul	One Time Task 🔲 Create Call 🗹	
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Open Windows 🕶	User : JulandaK 11/05/2021 Version : 2.5.0.0 Exam	nple Company v2.5.0.0

#### TIME BASED SCHEDULE

- 8. The *Select a Schedule Type* screen will be displayed.
  - i. There are **two** interval types available;
    - Time Based Schedule<sup>1</sup>
    - Condition Based Schedule<sup>2</sup>
  - ii. Click on the *row* of the *Time Based Schedule* type as this is the definition being created for the task.
  - iii. Click on OK.

<sup>&</sup>lt;sup>1</sup>The Time Based Schedule refers to days, weeks, months and years

<sup>&</sup>lt;sup>2</sup>The Condition Based Schedule refers to a meter definition based schedule, e.g. copies made



â <b>▼</b>	Edit Task - BPO: Version	2.5.0.0 - Example Company v2.5.0.0		_ <b>D</b> X
Home Equipment / Locations Contract Finance	e / HR Inventory Maintenance	Projects Manufacturing Procurer	nent Sales Service Reporting	Utilities _ 🗗 🗙
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Task Number TT06MCS *	Priority 2 🗘 *			BOM Details # BOMCode Des
Task Description 6 Month Machine Clean and Se * Duration	on (hrs) 3	*		BOM Details 4 BOMCode Des *
Person Responsible Belinda Sharman 🔹 * Down Tim	ne (hrs) 3	*		(esou
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	e Task 🔲 Create Call	$\checkmark$		
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		C Condition None		nst
		r i inte Note		
Open Windows -		Us	er : JulandaK 11/05/2021 Version : 2.5.0	0.0 Example Company v2.5.0.0

- Schedule Type: This field is populated with the schedule type code you have selected.
- Schedule Type Desc: This field is populated with the schedule type description you have selected.
- Service Every: Click in the text box and type in or use the arrow indicators to select the service performance interval<sup>1</sup>.

#### Add the Units

- 9. Click in the *Units* text box to display the *ellipsis* button.
  - i. Click on this button to display the *Select a Unit* screen.
  - ii. Click on the *row* of the unit code that you wish to link to this schedule definition.
  - iii. Click on **OK**.

<sup>1</sup>This interval depends on the schedule type, e.g. 6 for 6 months for a Time Schedule Type or 5000 for 5000 mono/colour copies for a Condition Schedule Type



😳 🔻 Edit Task - E	BPO: Version 2.5.0.0 - Example Company v2.5.0.0	- <b>D</b> X
Home Equipment / Locations Contract Finance / HR Inventory	Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities -	- 8 ×
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Task Description 6 Month Machine Clean and Se * Duration (hrs) 3		BOMCode
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	yyyy Years None	
		<u> </u>
Open Windows 🕶	bany	y v2.5.0.0 //.

- **Units:** The text box will be populated with the unit code you have selected.
- Unit Desc: The text box will be populated with the unit code description you have selected.

Note: The Meter Definition Code, Meter Definition Desc, Max Boundary and Min Boundary text boxes are not required when setting up the time schedule definition, but will be required when setting up the Condition schedule type definition.

- **Tolerance:** Click in the text box and *type* or use the *arrow* indicators to select the tolerance in which the task can be performed in, without affecting the next due execution point, if applicable.
- Extension Allowed: Click in the text box and *type* or use the *arrow* indicators to select the extension allowed for the task to be performed, if applicable.

The *Time schedule definition* has now been completed for this task.



ф <del>т</del>	Edit Tas	k - BPO: Version 2.5.0.0 -	Example Company v2.5.0.0			_ • ×
Home Equipment / Locations Contract	t Finance / HR Inventory	Maintenance / Projects	Manufacturing Procuremen	t Sales Service	Reporting Utilities	_ & ×
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Processing a Format a						~
Task Number TT06MCS •	Priority 2 🗘					BOM #
Task Description 6 Month Machine Clean and Se *	Duration (hrs) 3	•				BOMCode mal
Person Responsible Belinda Sharman 👻 *	Down Time (hrs) 3	+				BOMCode *
Work Order Type Scheduled Maintenance 🔹	Task Type Duplicate	•				Irce
Task Class Service +		omponents				
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Open Windows 🕶			User	: JulandaK 12/05/2021	Version : 2.5.0.0 Example Cor	npany v2.5.0.0

#### **CONDITION SCHEDULE DEFINITION**

- 1. Click anywhere in the Schedule Definition grid area to open a *new row*.
- 2. *Right click* anywhere in the *new row* to display the *Process* menu.
- 3. Click on the *Schedule Definition* Add new Schedule Definition.



		Edit Task - BPO: Version 2.5.0	0.0 - Example Company	v2.5.0.0					x
Home Equipment / Locations Contra	ct Finance / HR In	wentory Maintenance / Proje	ects Manufacturing	Procurement Sales	s Service	Reporting	Utilities	- 8	×
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Processing a Format a									6
Task Number TT06MCS	Priority	2 🗘 *						BOM 4	Exte
Task Description 6 Month Machine Clean and Se	Duration (hrs) 3		•					BOMCod	External Resource
Person Responsible Belinda Sharman 👻	Down Time (hrs) 3		•					-	Resol
Work Order Type Scheduled Maintenance	Task Type Du	plicate 🔹	•						TCE
Task Class Service 👻	Create Project	Applies to all sub components							
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1>		Delete Schedule Definition	-						
								10 )	

- 4. The Select a Schedule Type screen will be displayed.
  - i. There are **two** interval types available;
    - Time Based Schedule<sup>1</sup>
    - Condition Based Schedule<sup>2</sup>
  - ii. Click on the *row* of the *Condition* Based Schedule as this is the definition being created for the task.
  - iii. Click on OK.

<sup>1</sup>The Time Based Schedule refers to days, weeks, months and years

<sup>&</sup>lt;sup>2</sup>The Condition Based Schedule refers to a meter definition based schedule, e.g. copies made



	Edit Task - B	PO: Version 2.5.0.0 - E	xample Company v2.5.0.	0		- <b>•</b> x
Home Equipment / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing Procur	ement Sales Ser	rvice Reporting	Utilities _ 🗗 🗙
Save Back Processing						\$
Task Number TT06MCS •	Priority 2 2					BOM #
Task Description 6 Month Machine Clean and Se *	Duration (hrs) 3	+				BOMCode
Person Responsible Belinda Sharman 👻 *	Down Time (hrs) 3					* Res
Work Order Type Scheduled Maintenance	Task Type Duplicate	- •				BOM # BOMCode * Resource
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Open Windows 🕶	Capture	e screenshot.				1.

- Schedule Type: This field is populated with the schedule type code you have selected.
- Schedule Type Desc: This field is populated with the schedule type description you have selected.
- Service Every: Click in the text box and *type* or use the *arrow* indicators to select the service performance interval<sup>1</sup>.

#### Add the Meter Code

- Click in the *Meter Definition Code* text box to display the *ellipsis* button.
- 6. Click on this button to display the *Select a Meter Type Definition* screen.
  - i. Click on the *row* of the meter definition that you wish to link to this schedule definition.

<sup>1</sup>This interval depends on the schedule type, e.g. 6 for 6 months for a Time Schedule Type or 5000 for 5000 mono/colour copies for a Condition Schedule Type



ii. Click on OK.

\$ ·	Edit Task - BPO: Version 2.5.0,0	- Example Company v2.5.0.0	
Home Equipment / Locations Contract Fi	inance / HR Inventory Maintenance / Projects	s Manufacturing Procurement Sales Service Reporting Utilities -	8 ×
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Task Number TT06MCS	Priority 2 🗘 *	BOM .	# 2
Task Description 6 Month Machine Clean and Se * Du	uration (hrs) 3 *		MCode
Person Responsible Belinda Sharman 👻 * Down	n Time (hrs) 3 *		Reso
Work Order Type Scheduled Maintenance	Task Type Duplicate		urce
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		MCONMETE MCONMETE RESET Reset Mete ABS Absolute Copies	Cop
4	Í	Mono Mono meter CYCLE Cycle Meter ABS Absolute Copies	Cop
Open Windows -		4	- F

- **Units:** This text box will be populated with the meter type units you have selected.
- Units Description: This text box will be populated with the meter type description you have selected
- Meter Definition Code: This text box will be populated with the meter type definition you have selected.
- Meter Definition Desc: This text box will be populated with the meter type definition description you have selected.
- **Tolerance:** Click in the text box and *type* or use the *arrow* indicators to select the tolerance in which the task can be performed in, without affecting the next due execution point, if applicable.
- Extension Allowed: Click in the text box and *type* or use the arrow indicators to select the extension allowed for the task to be performed, if applicable.



## **SAVE DEFINITION DETAILS**

7. When you have finished linking the definition details, click on *Save*.

				Edit Tas	k - BPO: Version 2	.5.0.0 - Example Compan	y v2.5.0.0				
Home	Equipment / Locatio	ns Contrac	t Finance / HR	Inventory	Maintenance / P	rojects Manufacturing	Procurement S	ales Service	Reporting	Utilities	- 8
ave Back Save	e Layout Workspa	aces									
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Task Number	TT06MCS	•	Priority	2 🗘 *							BOM 4
Task Description	6 Month Machine	Clean and Se *	Duration (hrs)	3		+					BOMCod
erson Responsible	Belinda Sharman	•	Down Time (hrs)	3							*
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g a column header h ScheduleTyp 93 0 T	e ScheduleTyp Time	ServiceEvery 1.00	2yy Bi-ann	nual 0			(	.00 0.0	0.0	ExtensionAllowed 0 0.00	Instr 4

- 8. You will return to the *Tasks* list screen.
- 9. When you receive the *Tasks* message to confirm that;
  - The Task: [task number] has been saved.
- 10. Click on *OK*.



Home	a [		cations	Contract	Finance / HR	Inventory	Maintenar	nce / Projects	Manufacturing	Procuremen	it Sales	Service P	Reporting L	Itilities	- 8	>
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		TTO		Daily, Mono		Service	SM	Scheduled	-	Yes	No	Yes	No	SHA001	No	1
Shadow Tasks		TTC		Weekly, Mo		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	No	1
		TTC		Weekly, Col		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	No	1
		TTC		Weekly, Mo		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	No	1
Related Tasks		TTC		Monthly, M		Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
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		TTO	69	Yearly, Mon						Yes	No	Yes	No	DUT001	No	1
		TTC		2 Daily - Cal		Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	١
		TTC		2 Weekly		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	No	١
		TTO	72	2 Monthly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	١
		TTO	73	2 Yearly - C	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	١
		TOC		Daily - Call		Service	SM	Scheduled		Yes	No	Yes	No	MUD001	No	١
			T001	Test Task	SRV	Service	INSP	Inspection		Yes	No	Yes	No	SHA001	Yes	1
		<ul> <li>TTC</li> </ul>	6MCS	6 Month Ma	SRV	Service	SCH	Scheduled	2	Yes	No	Yes	No	SHA001	No	١
		T04	2	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	Yes	1
		1														P

# **REMOVE A SCHEDULED DEFINITION FROM A TASK**

- 1. From the *Edit Task* screen,
- 2. Click on the *row* of the schedule definition you wish to remove from the task.
- 3. *Right click* anywhere in the row to display the *Process* screen.
- 4. Select *Delete* Delete Schedule Definition.



‡ <b>⊤</b> 1—		Edit Task	- BPO: Version 2.5.0.0 -	Example Company v	/2.5.0.0				
Home Equipment / Locations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement Sales	Service	Reporting	Utilities	- 8 )
Save Back Processing									6
Task Number TT058	Priority	2 🗘 *							BOM #
Task Description Weekly, Mono 1000 - WO Only *	Duration (hrs)	1	+						BOMCode
Person Responsible Bianca Du Toit 🔹 *	Down Time (hrs)	1	•						BOMCode *
Work Order Type Scheduled Maintenance •	Task Type	Relative	•						
Task Class Service  *	Create Project on generation		oplies to all sub						
In Service Task 🗹	One Time Task		eate Call						
Is Overhaul	_								
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- 5. When you receive the *Delete Schedule Definition* message to confirm;
  - Are you sure you want to delete this schedule definition Condition?
- 6. Click on *Yes* if you are certain about your selection or,
  - Click on **No** to ignore the request and to leave the schedule definition linked to the task.
- 7. The schedule definition will be removed from the Task.

# SAVE THE SCHEDULE DEFINITION

8. Click on Save.



	Edit Task - BPO: Version 2.5.0.0 - Examp	le Company v2.5.0.0		_ <b>D</b> X
Home Equipment / Locations Contract Finan	ce / HR Inventory Maintenance / Projects Mar	ufacturing Procurement Sales	Service Reporting U	tilities — 🗗 🗙
Save Back Save Layout Workspaces				۵
Task Number TT058	Priority 2 🔹			BOM #
Task Description Weekly, Mono 1000 - WO Only * Durat	ion (hrs) 1 *			BOM# BOMCode *
Person Responsible Bianca Du Toit • Down Ti	me (hrs) 1 *			r Resou
Work Order Type Scheduled Maintenance	ask Type Relative 🔹			Ince
Task Class Service - Create on gen	Project Applies to all sub components			
In Service Task 🗹 One Tir	ne Task 🔲 Create Call 🔲			
Is Overhaul				
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- 9. You will return to the *Tasks* list screen.
- 10. When you receive the *Task* message to confirm that;
  - The Task: [task number] has been saved.
- 11. Click on *OK*.

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iks #		-				.4								//	
ter text to search 🔎		TaskNum	TaskDesc	TaskClass	TaskClassD	WOType	WOTypeDesc	Priority	InServiceTask	SingleWO	WOPerAsso	WOPerInstr.	EmployeeN	CreateProject	
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		TT057	Daily, Mono	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
Shadow Tasks		TT058	Weekly, Mo	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	
		TT059	Weekly, Col	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
		TT060	Weekly, Mo	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
Related Tasks		TT061	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
		TT062	'Monthly, C	SRV	Service	C14	Calculated		Yes	No	Yes	No	DUT001	No	
		TT063	Monthly, M	SRV	Se Tasks 🔫		9	×	Yes	No	Yes	No	SHA001	No	
		TT064	Bi-annually,	SRV	Se		11	2	Yes	No	Yes	No	DUT001	No	
		TT065	Bi-annually,	SRV	Se 💼	The Task :	TT058 has been s	aved.	Yes	No	Yes	No	DUT001	No	
		TT066	Bi-annually,	SRV	Se	The fusici Proso has been saved.			Yes	No	Yes	No	DUT001	No	
		TT067	Yearly, Mon	SRV	Se			2	Yes	No	Yes	No	SHA001	No	
		TT068	Yearly, Colo	SRV	Se			2	Yes	No	Yes	No	SHA001	No	
		TT069	Yearly, Mon	SRV	Se 10			2	Yes	No	Yes	No	DUT001	No	
		TT070	2 Daily - Cal	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
		TT071	2 Weekly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
		TT072	2 Monthly		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	No	
		TT073	2 Yearly - C		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	No	
		T001	Daily - Call		Service	SM	Scheduled		Yes	No	Yes	No	MUD001	No	
		TEST001	Test Task	SRV	Service	INSP	Inspection		Yes	No	Yes	No	SHA001	Yes	
		TT06MCS	6 Month Ma		Service	SCH	Scheduled		Yes	No	Yes	No	SHA001	No	
		T042	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	Yes	



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