

MAINTENANCE

TASKS – ASSIGN / REMOVE A BILL OF MATERIALS (BOM)

Linking material resource requirements to a Task, gives you the ability to see which parts are required for the Task to be completed. In order to link a Bill of Materials for parts required, you will need to ensure one has been configured. Refer to the **Creating a New Bill of Materials** manual to ensure that a BOM is already set up before you continue with this manual.

Ribbon Access: Maintenance / Projects > Tasks



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

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



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	TT060	Weekly, Mo	. SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
	TT061	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
Related Tasks	TT062	'Monthly, C	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	1
	TT063	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
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	TT067	Yearly, Mon	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
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	TT072	2 Monthly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	١
	TT073	2 Yearly - C	. SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	١
	T001	Daily - Call	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	No	١
	TEST001	Test Task	SRV	Service	INSP	Inspection	2	Yes	No	Yes	No	SHA001	Yes	1
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4. The *Edit Task* screen will be displayed.

ASSIGN BOM DETAILS TO TASK

- 5. In the **BOM Details** frame,
- Right click in an available line in the BOM details data grid to display the Process menu.
- 7. Click on **BOM** Add new BOM.



7	Edit	Task - BPO: Version 2.5.0.0 - E	xample Company v	2.5.0.0				- • ×
Home Equipment / Locations Contra	ct Finance / HR Invent	ory Maintenance / Projects	Manufacturing P	Procurement S	ales Service	Reporting Utili	ities	- & ×
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- 8. The *Select a BOM* screen will be displayed.
 - i. Click on the *row* of the *BOM* you wish to attach to this task.
 - ii. Click on **OK**.

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- 8. The selected BOM will be displayed in the **BOM Details** frame.
- 9. *Expand* the BOM Items frame to view a list of all the items required to complete the task.
- 10. Continue adding BOMs to the task as required.

P *	Edit Tas	k - BPO: Version 2.5.0.0 - E	xample Company v	2.5.0.0						
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REMOVE BOM DETAILS FROM A TASK

- 1. From the **BOM Details** frame,
- 2. *Right click* in the row of the BOM you wish to remove from the Task to display the *Process* Menu.
- 3. Select *Delete* Delete BOM



	Edit Task -	BPO: Version 2.5.0.0 - Exa	ample Company v2.5.0.0					_ D X
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4. When you receive the *Delete BOM* message to confirm;

• Are you sure you want to delete this bom [bom code]?

- 5. Click on Yes if you are certain about your selection, or
 - Click on *No* to ignore the request and leave the BOM assigned to the Task.

SAVE THE BOM DETAILS

6. When you have finished editing the Task, click on *Save*.



	Edit Task - BPO: Version 2	2.5.0.0 - Example Company v2.5.0.0						x
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- 7. You will return to the *Tasks* list screen.
- 8. When you receive the *Tasks* message to confirm that;
 - The Task: [task number] has been saved.
- 9. Click on *OK*.

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			TT071	2 Weekly		Service	SM	Scheduled		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	
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VIEW THE STATUS

- 1. From the *Tasks* list screen,
- 2. Click on the row of the *task* you wish to view the status of.
- 3. Click on *Edit*.

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

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Shadow Task			TT058	Weekly, Mo	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	
Shadow Task	3		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	
			TT061	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
Related Task	s		TT062	'Monthly, C	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	
			TT063	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
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			TT066	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	
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			TT071	2 Weekly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
			TT072	2 Monthly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	
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- 4. The *Edit Task* screen will be displayed.
- 5. The *Status* field for the BOM you have assigned has now been updated with *A Active*.
- 6. Click on *Back* to return to the *Tasks* list screen.



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