# 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*

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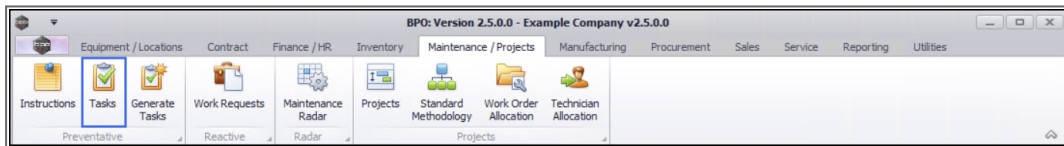
1. The *Tasks* list screen will be displayed.
2. Click on the *row* of the task you wish to *link* a *shadow task* to.
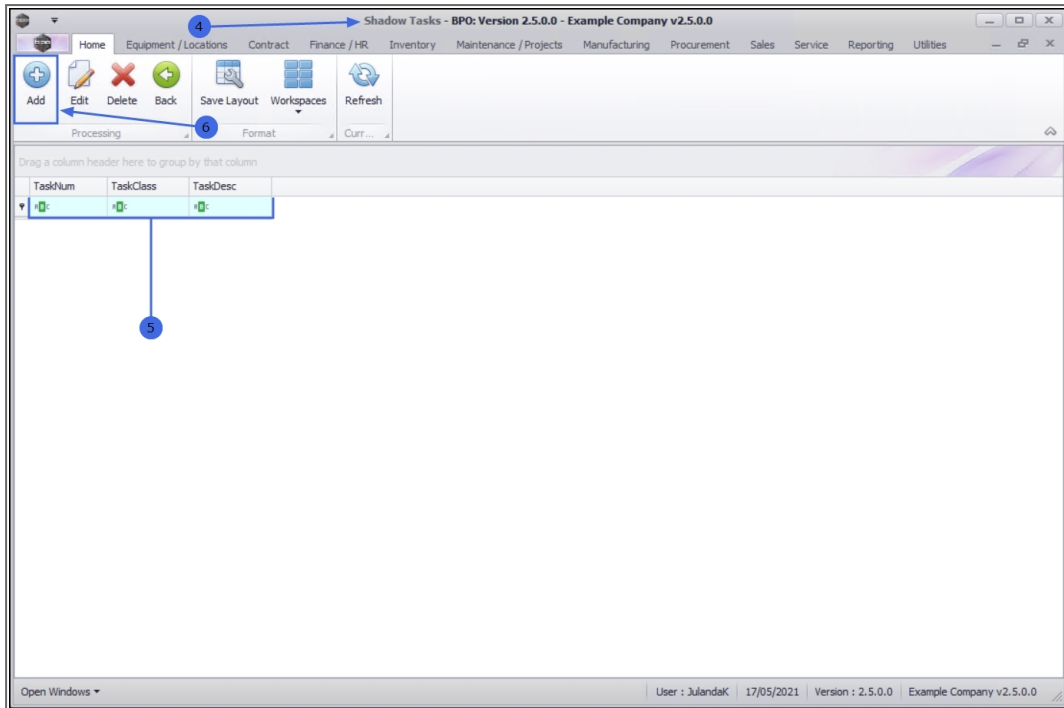3. Click on the *Shadow Tasks* tile.
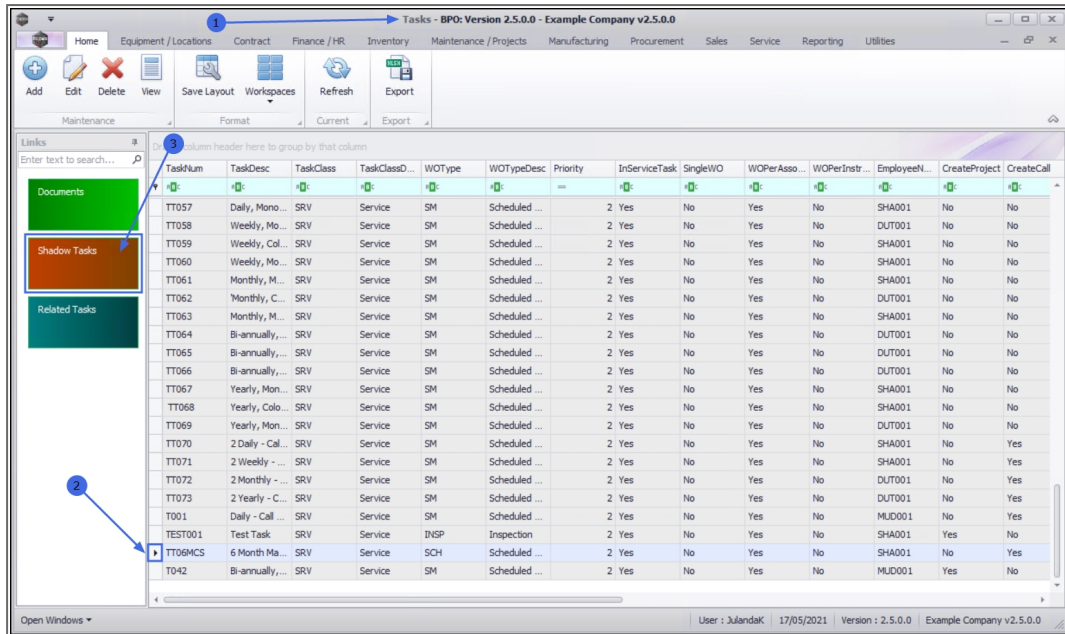
4. The *Shadow Tasks* list screen will be displayed.

5. Any tasks that have already been linked will be displayed in the data grid.

ADD A SHADOW TASK

6. Click on *Add*.

> Short cut key: *Right click* to display the *Process* menu list. 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.

9. The **right panel** contains the **Shadow Tasks** where the selected task(s) will be listed.

10. 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.

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[1]To 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 holding down the Control key, drag the files to the Shadow Tasks grid.
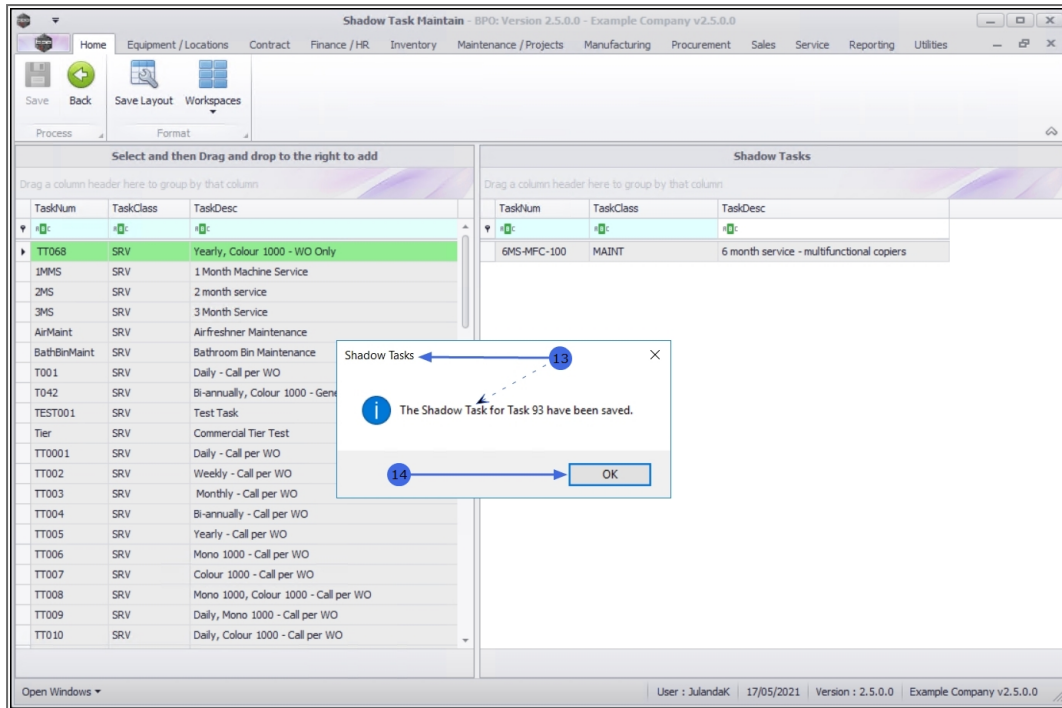
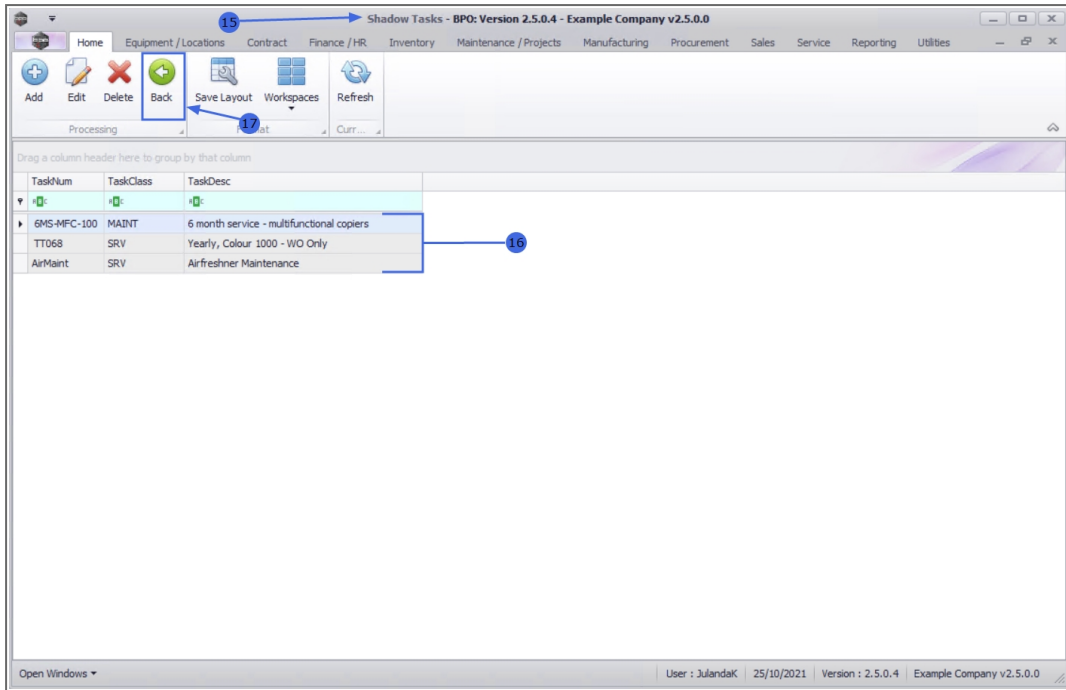## SAVE THE SHADOW TASK

12. When done, click on *Save*.
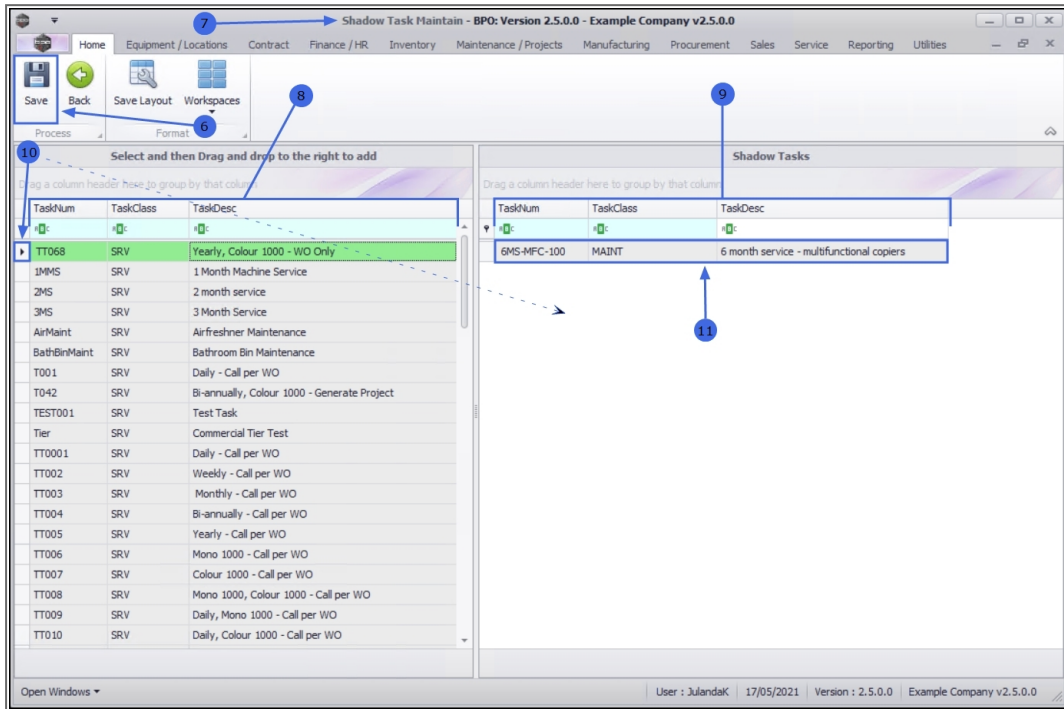
13. When you receive the *Shadow Tasks* message confirming that;
    - *The Shadow Task for Task [task number] have been saved.*
14. Click on *OK*.

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.

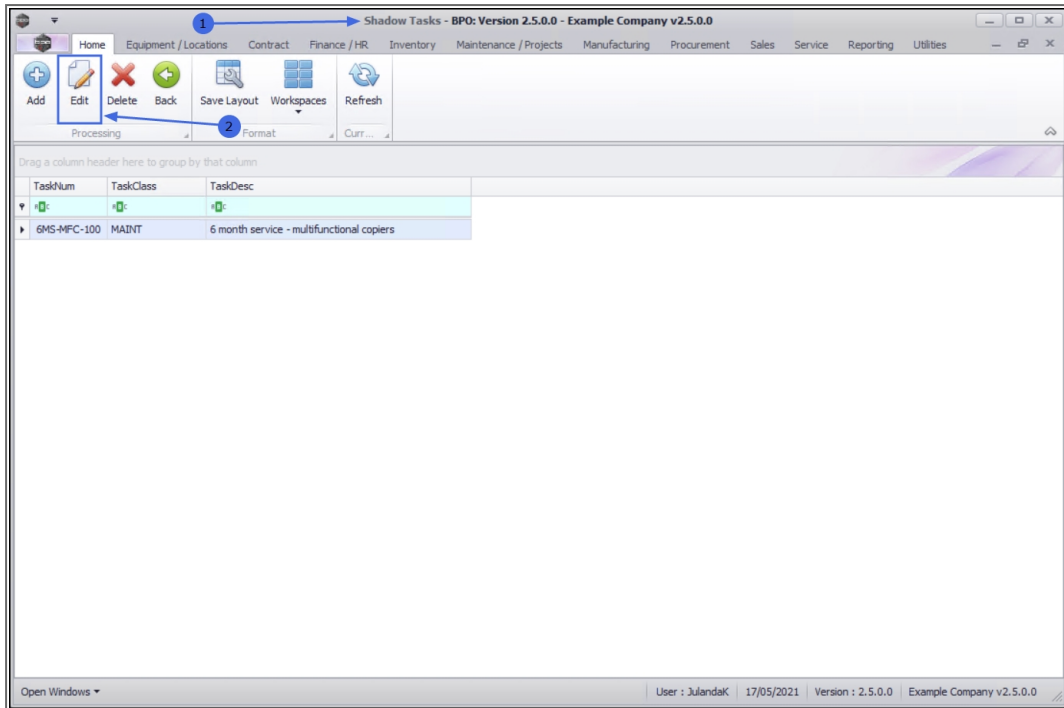17. Click on *Back* to return to the Tasks list screen.

EDIT THE SHADOW TASK

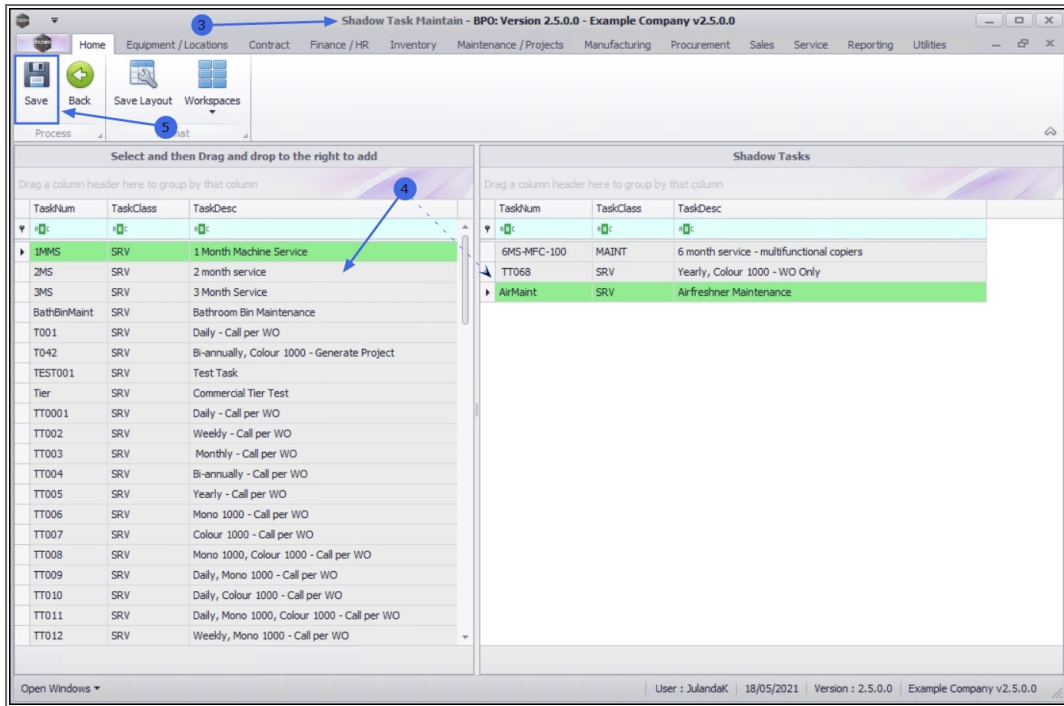1. From the *Shadow Tasks* list screen,

2. Click on *Edit*.

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

3. The *Shadow Task Maintain* screen will be displayed.

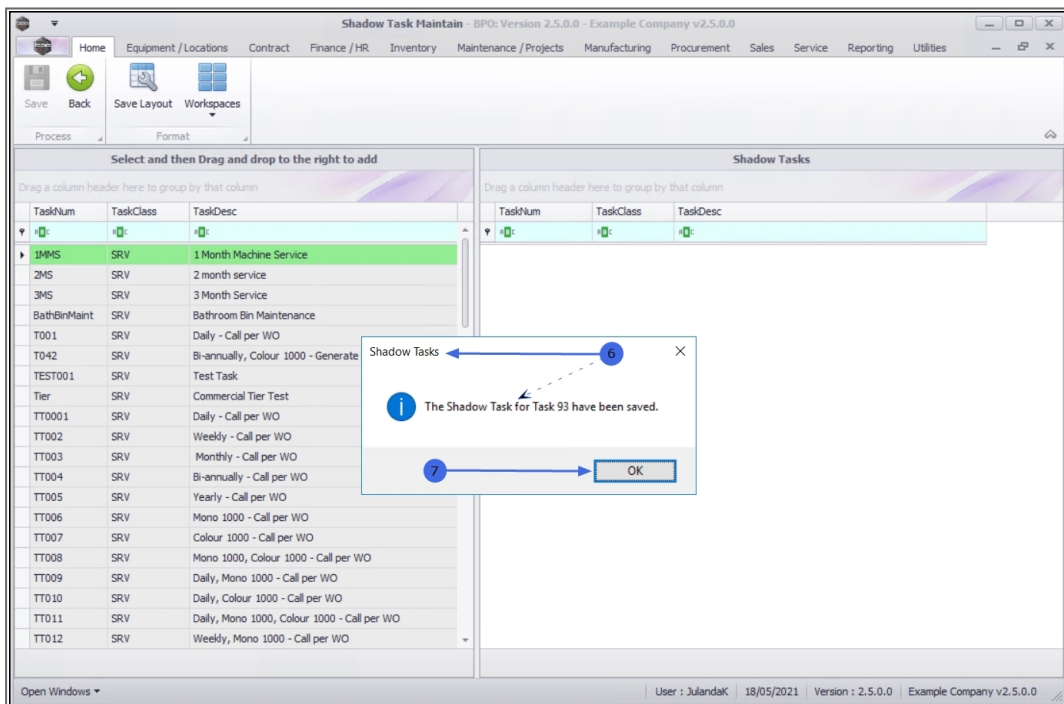4. You can link additional tasks to the Shadow Task panel.

SAVE THE SHADOW TASK

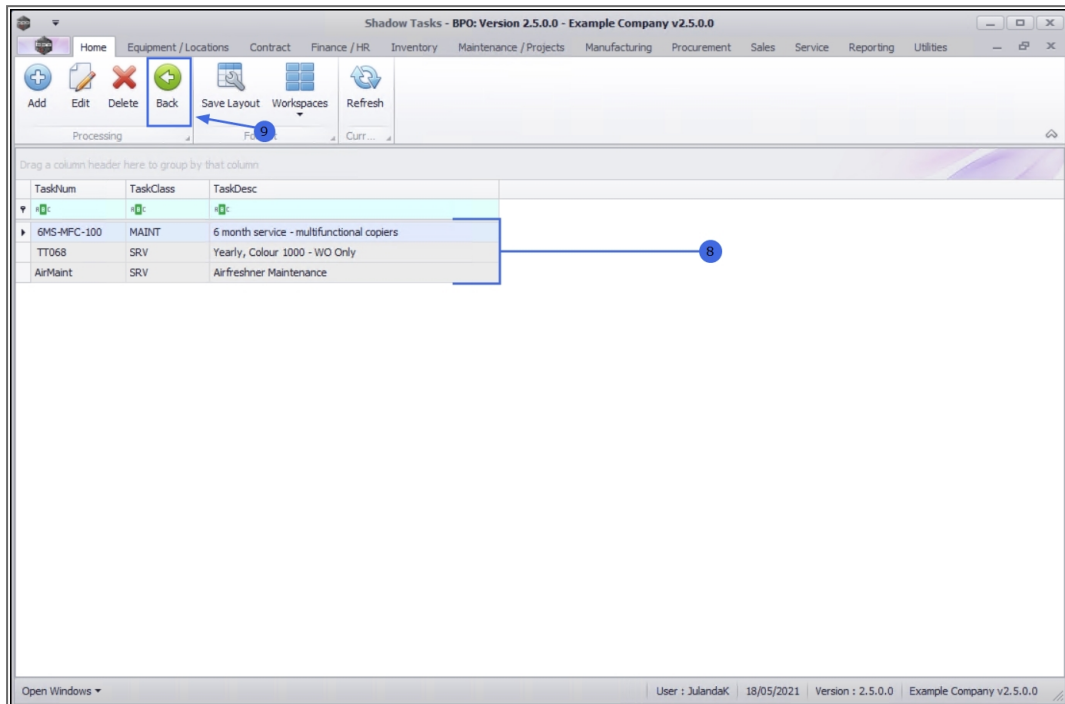5. When you have finished linking the required shadow task(s), click on *Save*.

6. When you receive the *Shadow Tasks* message to confirm that;
   - *The Shadow Task [task number] have been saved.*
7. Click on *OK*.

8. You will return to the *Shadow Tasks* screen where you can *view* the additional shadow tasks that were added for this Task.

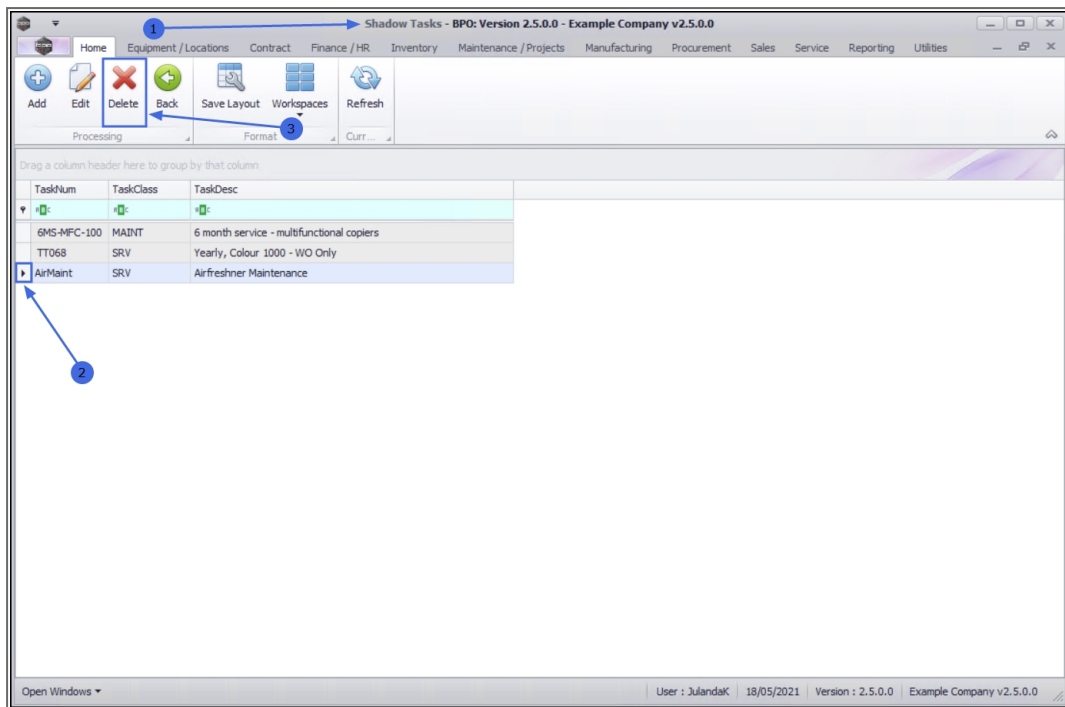9. Click on *Back* to return to the *Tasks* list screen.


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.*
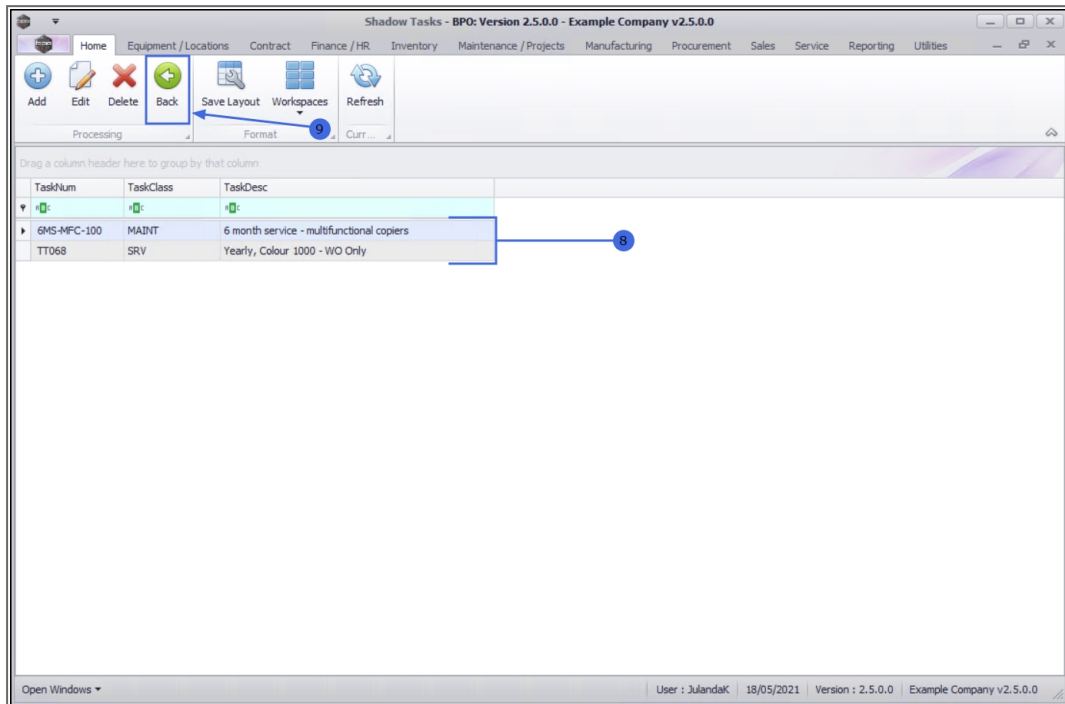   - Click on ***No*** to ignore the request and to leave the shadow task linked to the task.
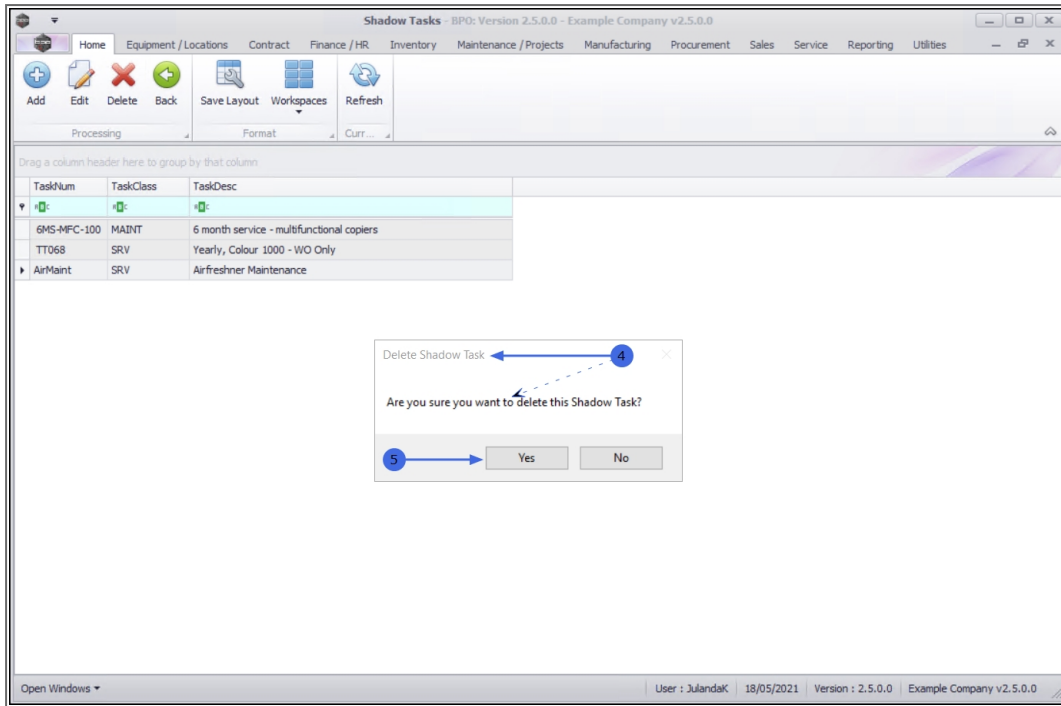
6. Next you will receive a message to confirm that;

- *Shadow Task Deleted.*

7. Click on *OK*.
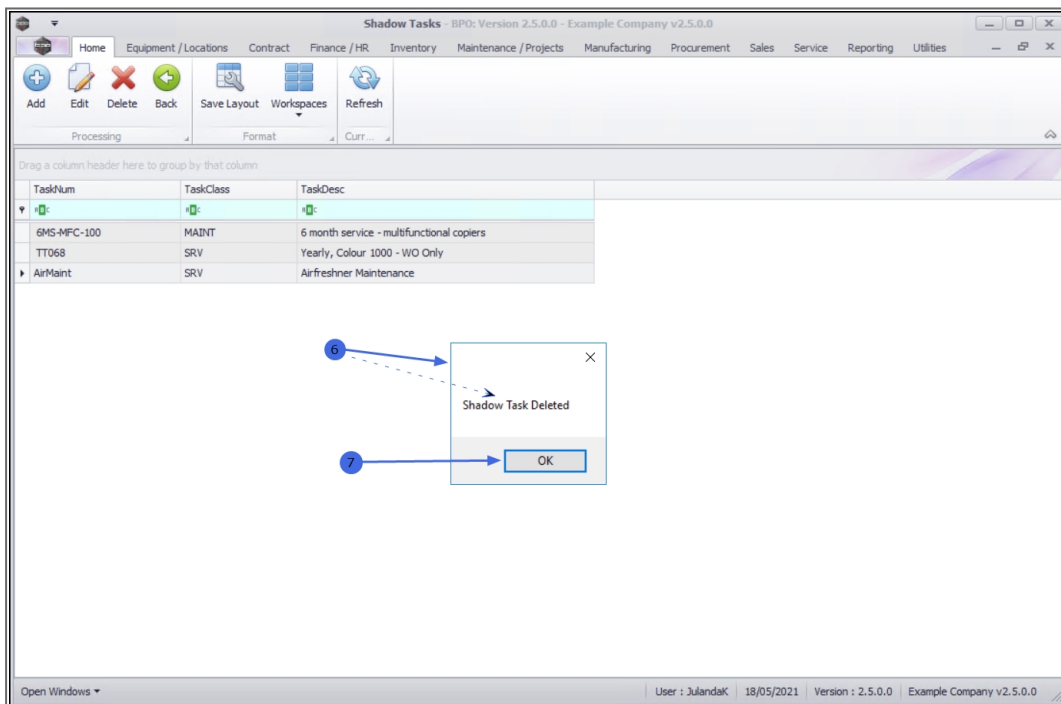
8. The *Shadow Tasks* screen will be updated and the Shadow Task you have removed will no longer be visible in the task data grid.

9. Click on *Back* to return to the *Tasks* list screen.

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