

MAINTENANCE

TASKS - LINK AN INSTRUCTION TO A TASK

It is important to note that least **one** Instruction must be linked to a Task.

Instructions are 'Work Instructions' to the person performing the required work.

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 an *instruction* to.
- 3. Click on *Edit*.

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



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

LINK AN INSTRUCTION

- In the *Instructions* panel, *right click* on a *row* in the data grid to display the *Process* drop-down menu.
- 6. Click on *Instruction* Add new instruction.



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- 7. The *Select an Instruction* screen will display.
 - i. Click on the *row* of the *instruction* you wish to *link* to this task.
 - ii. Click on **OK**.

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Instructions Details

- 8. The *Instruction Number*, *Instruction Description*, *Instruction Text*, *Priority* and *Status* text fields will populate with the instruction information selected.
 - **Priority:** Click in the text box to type in an alternative priority¹ level for the instruction, if required.
- 9. Continue adding instructions to this task, as required.

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REMOVE AN INSTRUCTION

- 1. From the *Instructions* frame,
- 2. *Right Click* in the row of the *Instruction* you wish to remove from the Task, to display the *Process* Menu.
- 3. Click on *Delete* Delete instruction.

11 = most important and 5 = least important



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- 4. When you receive the *Delete Instruction* message to confirm;
 - Are you sure you want to delete this instruction [instruction number]?
- 5. Click on Yes if you are certain about your selection, or
 - Click on *No* to ignore the request and to leave the Instruction linked to the Task.

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SAVE THE LINKED INSTRUCTIONS

6. When you have finished linking the instruction details, click on *Save*.

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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.



Link an Instruction

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