

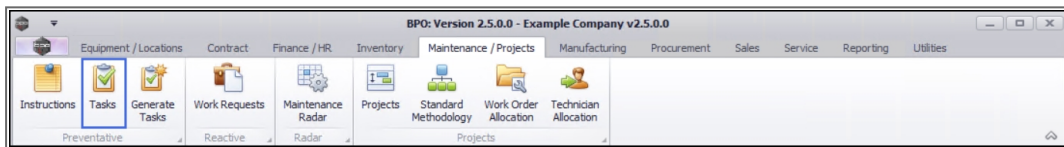
MAINTENANCE

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.

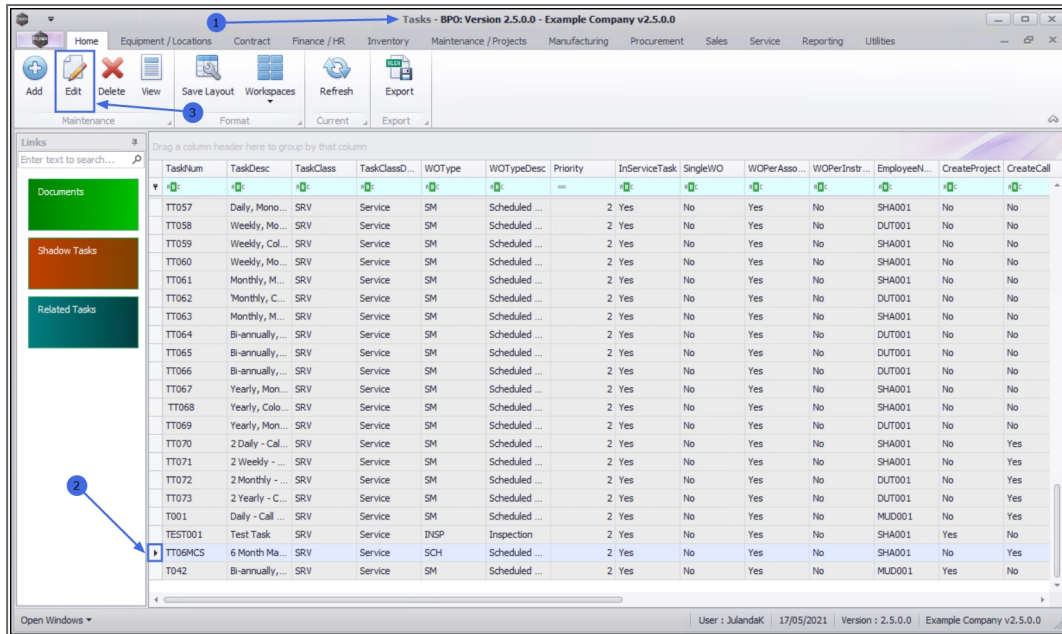
Ribbon Access: *Maintenance / Projects > Tasks*



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**.



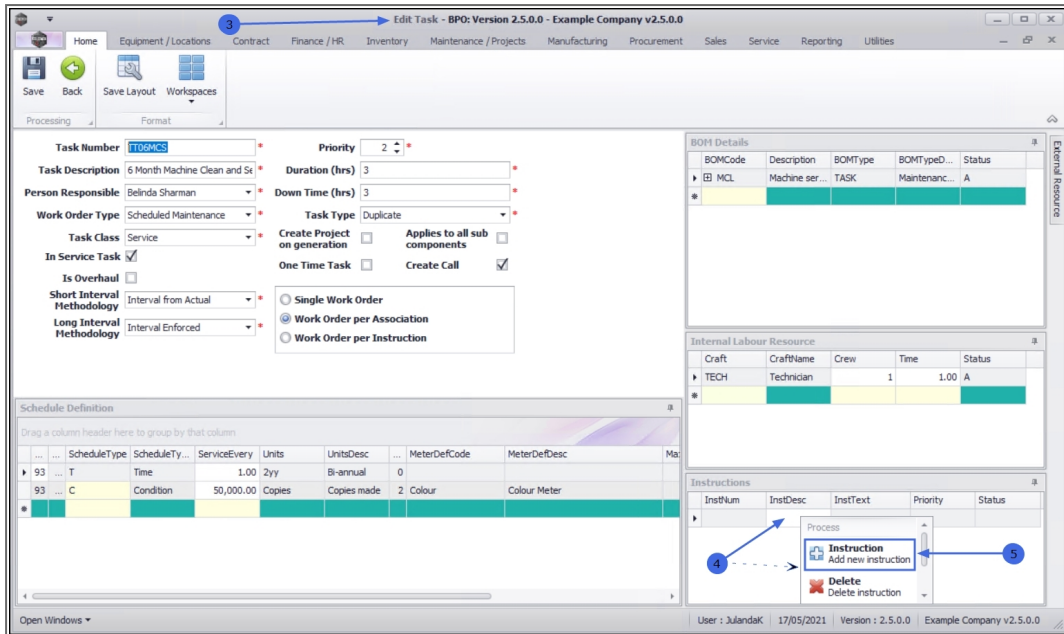
Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.



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

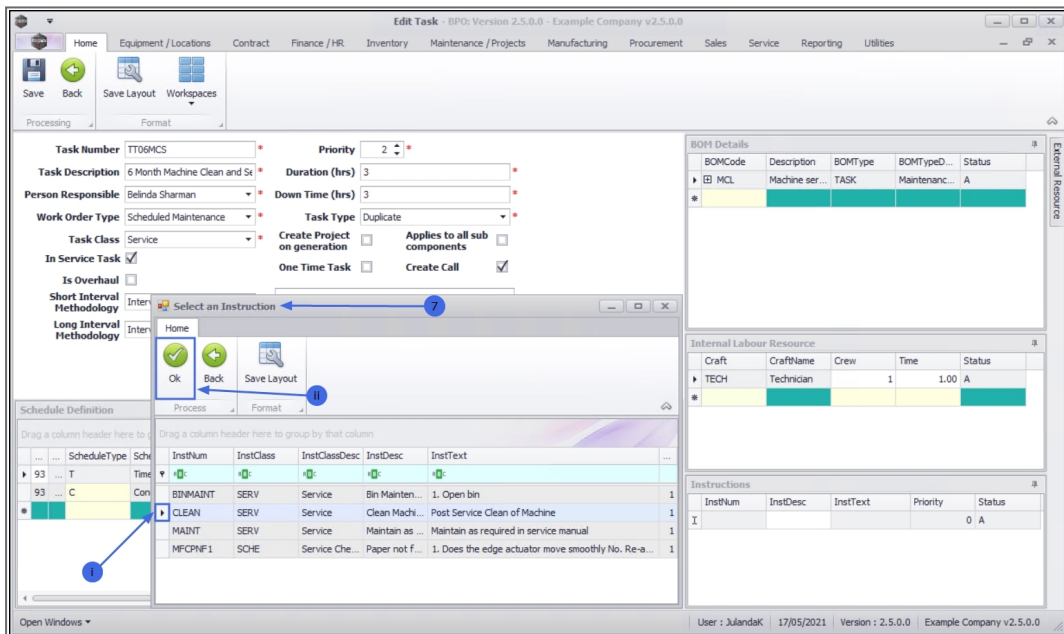
LINK AN INSTRUCTION

5. 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.



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**.

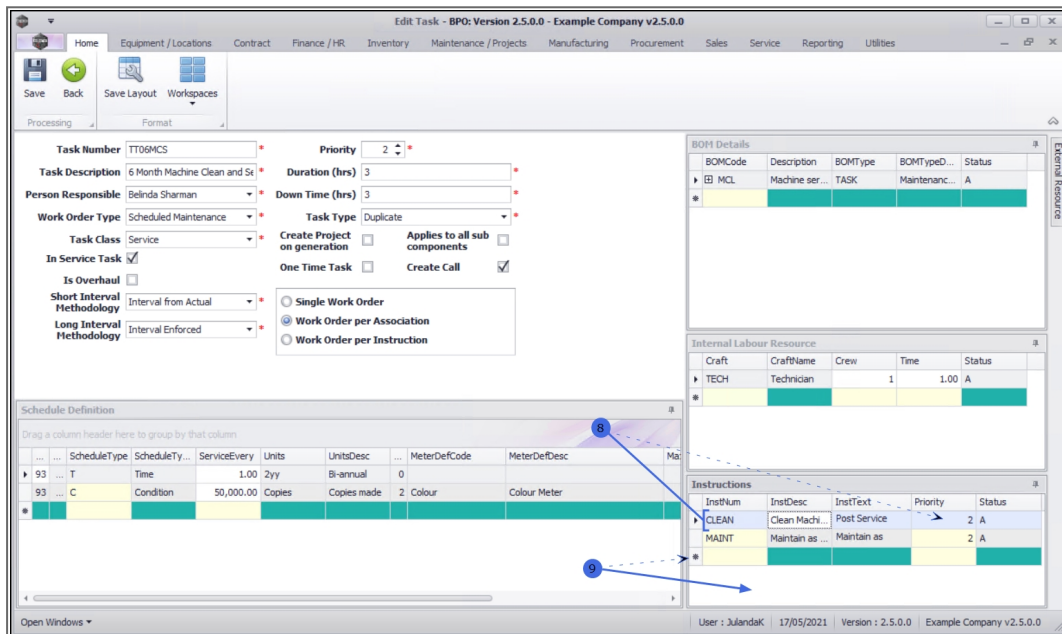


Instructions Details

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 **priority**¹ level for the instruction, if required.

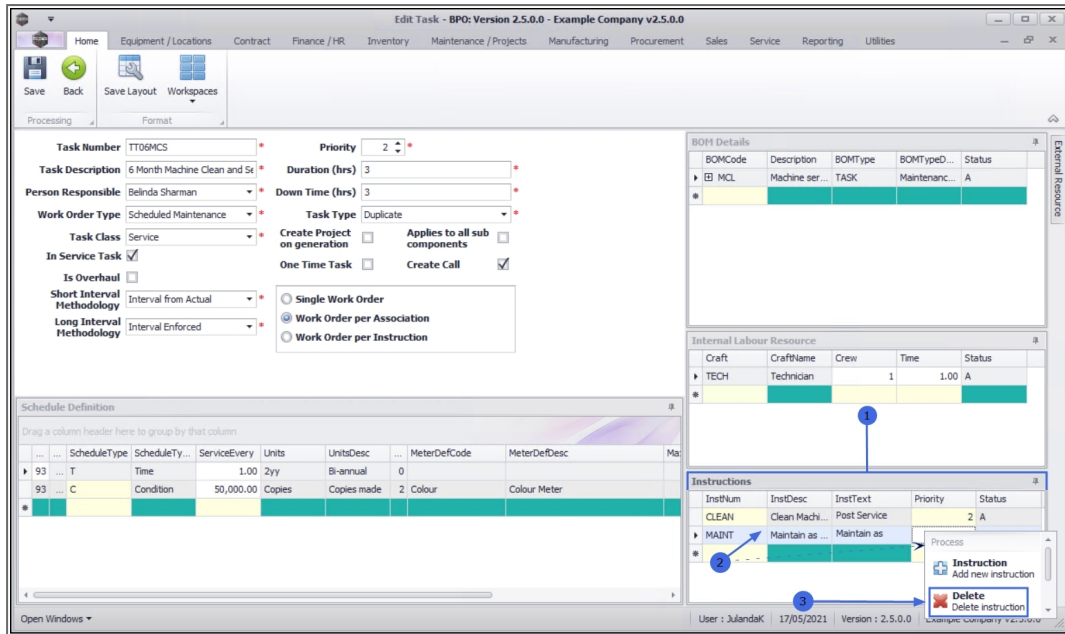
9. Continue adding instructions to this task, as required.



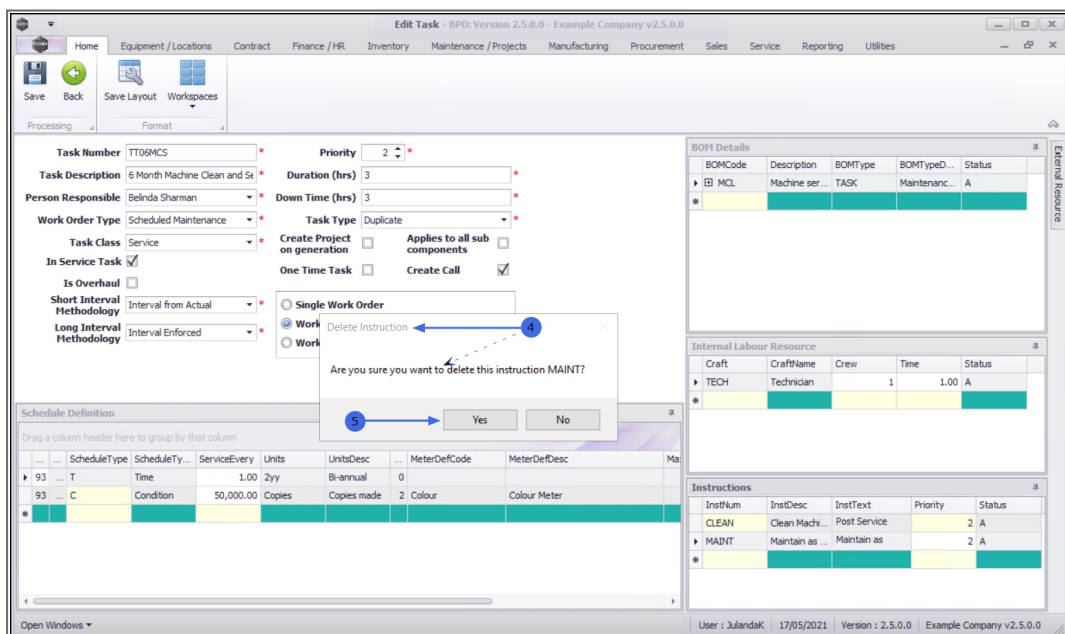
REMOVE AN INSTRUCTION

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

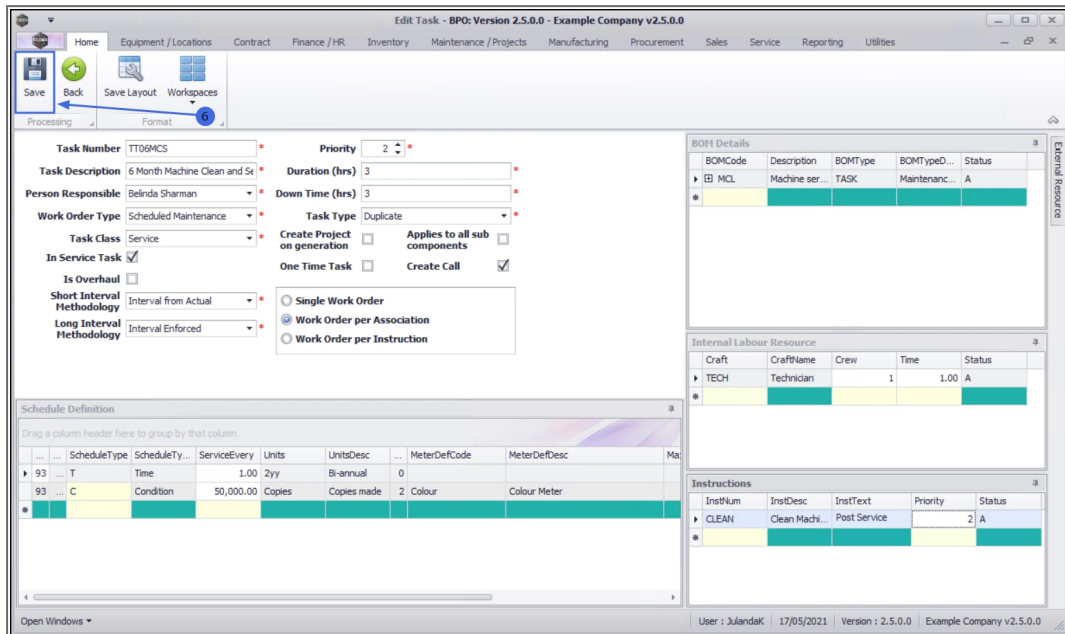


4. When you receive the **Delete Instruction** message to confirm;
 - **Are you sure you want to delete this instruction [instruction number]?**
5. Click on **Yes** if you are certain about your selection, or
 - Click on **No** to ignore the request and to leave the Instruction linked to the Task.



SAVE THE LINKED INSTRUCTIONS

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



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**.

The screenshot shows the 'Tasks' window in the CO3 software. The window title is 'Tasks - BPO: Version 2.5.0.0 - Example Company v2.5.0.0'. The interface includes a menu bar with options like Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, Refresh, and Export. A 'Links' sidebar on the left contains 'Documents', 'Shadow Tasks', and 'Related Tasks'. The main area is a table with columns: TaskNum, TaskDesc, TaskClass, TaskClassD..., WOType, WOTypeDesc, Priority, InServiceTask, SingleWO, WOPerAsso..., WOPerInstr..., EmployeeN..., CreateProject, and CreateCall. A dialog box titled 'Tasks' is open, displaying the message 'The Task : TT05MCS has been saved.' with an 'OK' button. A red circle '8' is placed on the dialog box, and a red circle '9' is on the 'OK' button. A red circle '7' is on the 'Tasks' menu item in the top bar.

TaskNum	TaskDesc	TaskClass	TaskClassD...	WOType	WOTypeDesc	Priority	InServiceTask	SingleWO	WOPerAsso...	WOPerInstr...	EmployeeN...	CreateProject	CreateCall
TT055	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	No
TT056	Daily, Colou...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT057	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT058	Weekly, Mo...	SRV	Service	SM	Scheduled...	2	Yes	No	Yes	No	DUT001	No	No
TT059	Weekly, Cal...	SRV	Service	SM	Scheduled...	2	Yes	No	Yes	No	SHA001	No	No
TT060	Weekly, Mo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT061	Monthly, M...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT062	Monthly, C...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	No
TT063	Monthly, M...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT064	Bi-annually...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	No
TT065	Bi-annually...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	No
TT066	Bi-annually...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	No
TT067	Yearly, Mon...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT068	Yearly, Colo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	No
TT069	Yearly, Mon...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	No
TT070	2 Daily - Cal...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	Yes
TT071	2 Weekly - ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	Yes
TT072	2 Monthly - ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	Yes
TT073	2 Yearly - C...	SRV	Service	SM	Scheduled...	2	Yes	No	Yes	No	DUT001	No	Yes
T001	Daily - Call ...	SRV	Service	SM	Scheduled...	2	Yes	No	Yes	No	MUD001	No	Yes
TEST001	Test Task	SRV	Service	INSP	Inspection	2	Yes	No	Yes	No	SHA001	Yes	No
TT06MCS	6 Month Ma...	SRV	Service	SCH	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	Yes

MNU.044.011

