

# SERVICE

## MY WORK - VIEW, EDIT, ADD SCHEDULED MAINTENANCE TASKS

The **My Work** screen deals with work that is assigned to a specific employee, i.e. when an employee is logged in, that employee can only see work orders assigned to themselves.

This screen has similar functionality to the Call screen in that the employee can request parts, services and loan units; book time, travel and expenses; view customer and machine details (including warranty information) and link **scheduled maintenance tasks**.

Ribbon Access: Service > My Work



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#### **VIEW SCHEDULED MAINTENANCE TASKS**

The *My Work* listing screen will be displayed.

- Click on the *row selector* in front of the *work order* that you wish to *view* the scheduled maintenance task(s) of.
- Click on *Edit*.

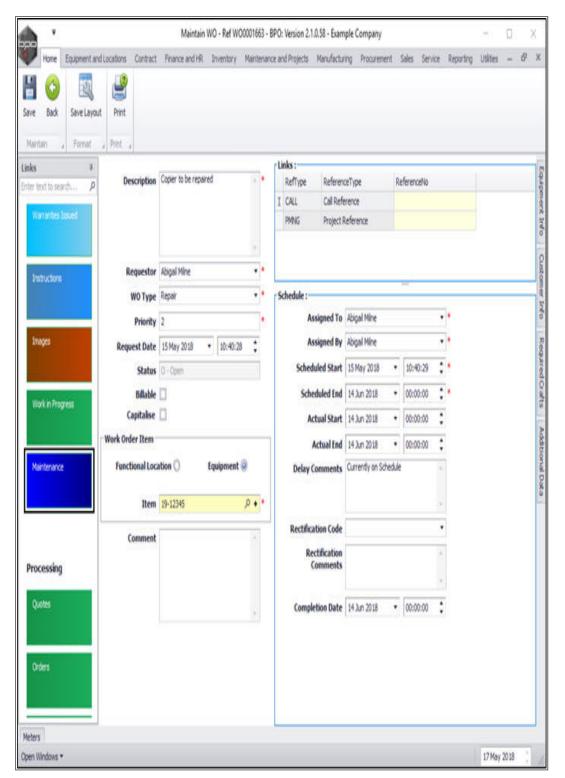
Help v2.5.0.14 - Pg 3 - Printed: 25/06/2024



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- The *Maintain WO Ref []* screen will be displayed.
- Click on the *Maintenance* tile.





- The *Maintenance Methodology for []* listing screen will be displayed.
- Here you can *view* a list of all the maintenance task(s) *linked* to the selected work order.



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1006	Mono 1000 - Call per WO	C	Condition	Mono_5	Copies	1000.00			Yes	Yes	Yes	



## EDIT A TIME-BASED SCHEDULED MAINTENANCE TASK

- In the *Maintenance Methodology for []* screen, click on the *row selector* in front of the *task* you wish to *edit*.
- Click on *Edit*.





- The *Edit task schedule* screen will be displayed.
- Select the details that you wish to change in this screen.
  - In this image, the Last Performed, Next Performed, Times Completed and Factor details have been selected to be changed.
    - *Note*: You can edit any field that is not greyed out.



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• When you have finished making the required adjustments, click on *Save*.

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- The edited details will be *saved* and you will return to the *Maintenance Methodology for []* screen.
- Here you can *view* the updated changes in the *row* of the selected task.



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BathBinMaint	A DESCRIPTION OF THE OWNER OF THE	-	-	_	_	Time		_	W		01 May 2017	and the second value of	Yes	Yes	Yes	
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## EDIT A CONDITION-BASED SCHEDULED MAINTENANCE TASK

- In the Maintenance Methodology for [] screen, click on the row selector in front of the task you wish to edit.
- Click on *Edit*.

Home	Equipment and Locations Contract	Finance and HR Inventor	y Maintenance and	Projects Manu	facturing Procuremer	nt Sales Service	Reporting Utilities	- 8
d Edit	Delete Back Save Layout Work	•						
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- The *Edit task schedule* screen will be displayed.
- Select the details that you wish to change in this screen.
  - In this image, the *Day of week* and *Week of Month* details have been selected to be changed.
    - *Note*: You can edit any field that is not greyed out.



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• When you have finished making the required adjustments, click on

Save.

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The edited details will be *saved* and you will return to the *Main-tenance Methodology for []* screen.



• Here you can *view* the updated changes in the *row* of the selected task.

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## ADD A TIME-BASED SCHEDULED MAINTENANCE TASK

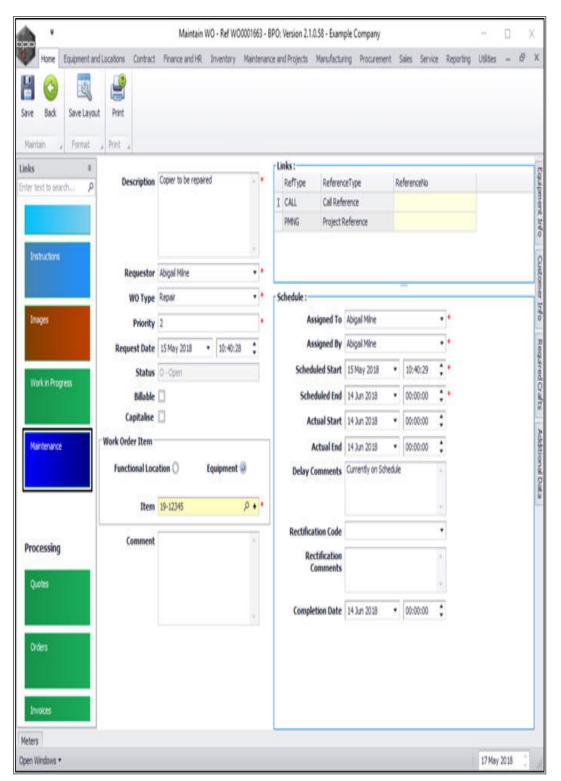
- In the *My Work* screen, click on the *row selector* in front of the *work order* that you wish to *add* a scheduled maintenance task to.
- Click on *Edit*.



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- The *Maintain WO Ref WO[]* screen will be displayed.
- Click on the *Maintenance* tile.





- The *Maintenance Methodology for []* screen will be displayed.
- Click on **Add**.

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- The *Add new task schedule* screen will be displayed.
- Click on the *search* button in the *Task Num* field.

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- The *Select the task schedule* pop up screen will appear.
- Click on the *row selector* in front of the *task schedule* that you wish to *add* to the work order.
- Click on *Ok*.



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		TT004	Bi-annually - Call per WO	Time		2үү	Bi-annual	1.00		
		TT005	Yearly - Call per WO	Time		уууу	Years	1.00		
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- **Task Num:** This will now auto populate with the selected task schedule number.
- **Schedule Type:** This will now auto populate with the selected task schedule type.
- **Units:** This will now auto populate with the unit type set up on the selected task schedule.
- **Meter:** This will be blank since we are adding a time based scheduled maintenance task.
- **Perform Interval:** This will now auto populate with the performance interval condition set up on the selected task schedule.
- **Min Reading:** This will now auto populate with the minimum reading set up on the selected task schedule if applicable.
- **Max Reading:** This will now auto populate with the maximum reading set up on the selected task schedule if applicable.



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- Last Performed: Click in this text box and either type in or use the arrow indicators to select the last performed date.
- **Next Performed:** Click in this text box and either type in or use the arrow indicators to select the next performance date.
- **Times Completed:** Click in this text box and either type in or use the arrow indicators to select the times this task schedule has been completed.
- **Factor:** Click in this text box and either type in or use the arrow indicators to select the factor.
- Day of the Week: Click on the drop-down arrow in this text box and select the day of the week that you would prefer this task schedule to be performed. If there is no preferred day then select 'None'.
- Week of the Month: Click on the drop-down arrow in this text box and select the week of the month that you would prefer this task schedule to be performed. If there is no preferred week then select 'None'.
- Include Weekends: Click in this check box if you want this task schedule to be performed on the next performance day even if this day falls on a weekend.
- Include Holidays: Click in this check box if you want this task schedule to be performed on the next performance day even if this day falls on a (public) holiday.



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• When you have finished completing the new task schedule details, click on *Save*.

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- The task schedule details will be *saved* and you will return to the Maintenance Methodology for [] listing screen.
- You can now *view* the newly added task schedule details in this screen.



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-		om Bin Maintenance		Time		W		01 May 2017	01 Jun 2017	Yes	Yes	Yes	
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	1 Mont	th Machine Service	1	Time		n,	1.00	17 May 2018	17 Jun 2018	16	Yes	Yes	



## ADD A CONDITION-BASED SCHEDULED MAINTENANCE TASK

- In the *My Work* screen, click on the *row selector* in front of the *work order* that you wish to *add* a scheduled maintenance task to.
- Click on *Edit*.

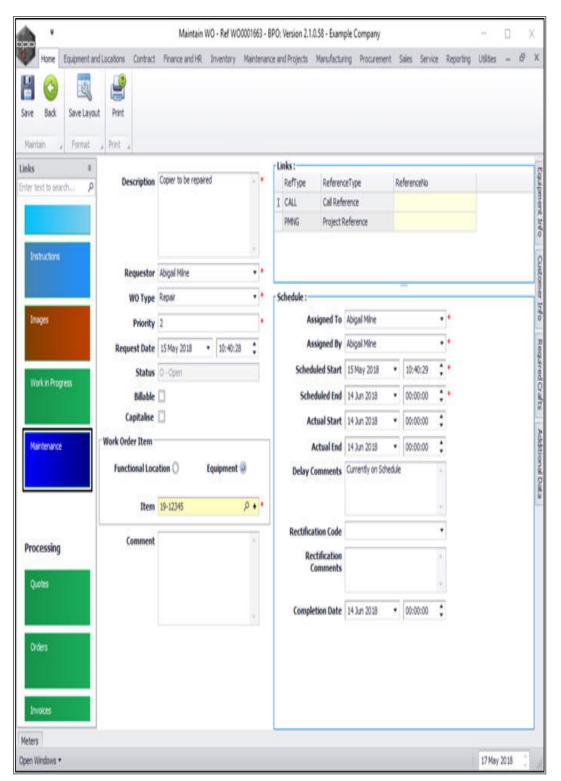
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<b>h</b> '				My Wo	rk - BPO: V	/ersion 2.1.0.58 - E	ample Compa	iny			÷ 0	Х
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■ W00001663	Copier to be repaire	d	Durban	0	REP	Machine Repairs						
₩00001663	Copier to be repaire	d	Durban	0	REP	Machine Kepara						



- The *Maintain WO Ref WO[]* screen will be displayed.
- Click on the *Maintenance* tile.





- The *Maintenance Methodology for []* screen will be displayed.
- Click on **Add**.

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BathBa	Maint	Bathroom	Bin Mainte	snance	Ţ		Time			w	1.00	01 May 2017	01 Jun 2017	Yes	Yes	Yes	
TT006		Mono 100	0 - Cal pe	r WO	C		Condition	n	Mono_5	Copies	1 000.00			Yes	Yes	Yes	



- The *Add new task schedule* screen will be displayed.
- Click on the *search* button in the *Task Num* field.

=			Add new tas	k schedule	- BPO: Version 2.2.0.1 - TE	ST ALPHA - JUD	ITH PC LOCAL							X
Home Equip	oment and Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	æ	x
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Day Of Week	None		•											
Week Of Month	None		•											
Open Windows 🔻						User : Judi	thM 09 May 2	019 V	ersion : 2.3	2.0.1 TEST	ALPHA - J	JDITH PC LO	DCAL	
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- The *Select the task schedule* pop up screen will appear.
- Click on the *row selector* in front of the *task schedule* that you wish to *add* to the work order.
- Click on *Ok*.



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Perform Interval								1
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<b>Times Completed</b>	0 🗘			TT003	Monthly - Call per WO	Time		
Factor	1 🐥			TT004 TT005	Bi-annually - Call per WO Yearly - Call per WO	Time		
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				TT008	Mono 1000 Colour 1000 - Call per WO	Condition	Colour_28	
	7			TTOO9	Daily Mono 1000 - Call per WO	Time		
				TT009	Daily Mono 1000 - Call per WO	Condition	Mono_28	i

- **Task Num:** This will now auto populate with the selected task schedule number.
- **Schedule Type:** This will now auto populate with the selected task schedule type.
- **Units:** This will now auto populate with the unit type set up on the selected task schedule.
- **Meter:** This will now auto populate with the meter type set up on the selected task schedule.
- **Perform Interval:** This will now auto populate with the performance interval condition set up on the selected task schedule.
- **Min Reading:** This will now auto populate with the minimum reading set up on the selected task schedule if applicable.
- **Max Reading:** This will now auto populate with the maximum reading set up on the selected task schedule if applicable.



=			Add new tas	k schedule	- BPO: Version 2.2.0.1 - TE	ST ALPHA - JUD	ITH PC LOCAL						
Home Equi	oment and Locations	Contract	Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	_	₽ x
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		*											
Open Windows 🔻						User : Judi	thM 09 May 2	019	Version : 2.	2.0.1 TEST	ALPHA - J	UDITH PC LC	ICAL //

- Last Performed: Click in this text box and type in the last performed meter reading.
- **Next Performed:** Click in this text box and type in the next performance meter reading.
- **Times Completed:** Click in this text box and either type in or use the arrow indicators to select the times this task schedule has been completed.
- Factor: This will auto populate with 1.
- Day of the Week: Click on the drop-down arrow in this text box and select the day of the week that you would prefer this task schedule to be performed. If there is no preferred day then select 'None'.
- Week of the Month: Click on the drop-down arrow in this text box and select the week of the month that you would prefer this task schedule to be performed. If there is no preferred week then select 'None'.



- Include Weekends: Click in this check box if you want this task schedule to be performed on the next performance day even if this day falls on a weekend.
- Include Holidays: Click in this check box if you want this task schedule to be performed on the next performance day even if this day falls on a (public) holiday.

<b>\$</b> 7		Add new ta	sk schedule	- BPO: Version 2.2.0.1 - TI	ST ALPHA - JUD	TTH PC LOCAL						D X
Home Equip	oment and Locatio	ns Contract Finance and HR	Inventory	Maintenance and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	₽ ×
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Open Windows 🔻					User : Judi	ithM 09 May 2	019 V	/ersion : 2.3	2.0.1 TES	r Alpha - Ju	DITH PC L	OCAL

• When you have finished completing the new task schedule details, click on *Save*.



	The first	a task scheuule	- BPO: Version 2.2.0.1 - TE	STALPHA - JUD	TTH PC LOCAL					-		X
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- The task schedule details will be *saved* and you will return to the *Maintenance Methodology for []* listing screen.
- You can now *view* the newly added task schedule details in this screen.

	Mai	ntenance Methodology fo	or Asset : - BPO: Ver	sion 2.2.0.1 - T	TEST ALPHA - JUDITH	PC LOCAL		
G 💋	Equipment and Locations Contract	Finance and HR Inventor					Reporting Utilities	- 8
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	noc	REC Schedule TypeDesc	ill:	and c	ServiceEvery		=	In the second se
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