

We are currently updating our site; thank you for your patience.

MAINTENANCE

INTRODUCTION TO TASKS

Tasks are set up in order to perform scheduled maintenance / service and are linked to Serialised Items / Locations, with 'Last Done' and 'Next Due' information.

Generation methodology is set up against the task to specify the scheduled interval between maintenance / services. For example, the task can be a service that is performed every 3 months.

Each task can have more than one generation methodology - where the task is due every 3 months or 10,000 copies - whichever comes first.

Instructions linked will indicate what work needs to be done to complete the task.

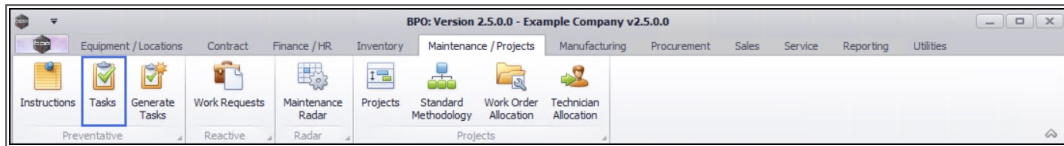
Parts required for the task will be requested where a **Bill of Materials** is indicated.

Documentation, Shadow and **Related Tasks** can also be configured.

This will be kept up to date by the generation of the tasks on a regular basis via the **Task Radar** or **Work Order Generation**.

TASKS PROCESS FLOW

Ribbon Access: Maintenance / Projects > Tasks



- The **Tasks** listing screen will be displayed.

INSTRUCTIONS MAINTENANCE BUTTONS

- From this screen you can [Add](#), [Edit](#), [Delete](#), and [View](#) a Task.
- The [Export](#) button will allow you to export the list of Tasks to an Excel Spreadsheet.

FUNCTIONS TILES

- **Documents:** The Documents Tile allows you to view a list of the [digital documents](#) that have been linked to a selected Instruction.
- **Shadow Tasks:** The Shadow Tasks Tile allows you to [link and unlink](#) shadow tasks to the selected Task.
- **Related Tasks:** The Related Tasks Tile allows you to [link and unlink](#) related tasks to the selected Task.

TASKS DATA GRID

- The Data Grid lists all the **Tasks** that have already been set up.
- Any new Tasks that gets created will be added to the list.

The screenshot displays the 'Tasks - BPO: Version 2.5.0.0 - Example Company v2.5.0.0' window. The interface includes a top navigation bar with various modules like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a ribbon with options: 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 of tasks with columns: TaskNum, TaskDesc, TaskClass, TaskClassD..., WOType, WOTypeDesc, Priority, InServiceTask, SingleWO, WOPerAsso..., WOPerInstr..., and EmployeeN... The table lists 13 tasks (TT001 to TT013) with various details. Numbered callouts are present: 1 points to the 'Export' button in the ribbon; 2 points to the 'Links' sidebar; 3 points to the 'Export' button in the ribbon; 4 points to the 'Related Tasks' link; and 5 points to the 'Priority' column header in the table.

TaskNum	TaskDesc	TaskClass	TaskClassD...	WOType	WOTypeDesc	Priority	InServiceTask	SingleWO	WOPerAsso...	WOPerInstr...	EmployeeN...
3MS	3 Month Ser...	SRV	Service	NDS	New Deal S...	2	Yes	No	Yes	No	DUT001
IMMS	1 Month Ma...	SRV	Service	SERV	Service	2	Yes	No	Yes	No	SHA001
WS	Weekly Ser...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
BathBinMaint	Bathroom Bi...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
AirMaint	Air fresher ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001
Weekly	WeekMond...	SRV	Service	IT	IT Requirem...	2	Yes	No	Yes	No	RED001
2MS	2 month ser...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001
Tier	Commercial ...	SRV	Service	INST	Installation	2	Yes	No	Yes	No	DUT001
6MS-MFC-1...	6 month ser...	MAINT	Maintenance	SERV	Service	2	No	Yes	No	No	BAL001
TT0001	Daily - Call ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT002	Weekly - Ca...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT003	Monthly - C...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT004	Bi-annually ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT005	Yearly - Call...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT006	Mono 1000 ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT007	Colour 1000...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001
TT008	Mono 1000,...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT009	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT010	Daily, Colou...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT011	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT012	Weekly, Mo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001
TT013	Weeklv. Col...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001

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