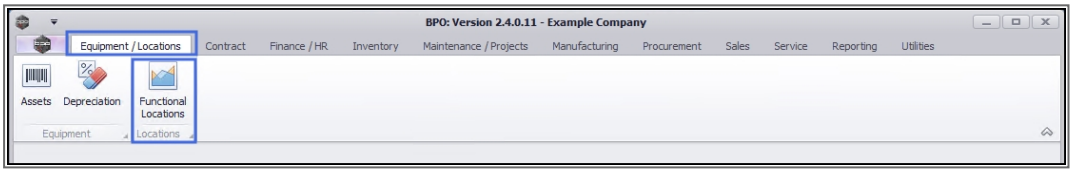
We are currently updating our site; thank you for your patience.

LOCATIONS

FUNCTIONAL LOCATIONS - MAINTENANCE METHODOLOGY (TASK SCHEDULE)

Ribbon Access: Equipment and Locations > Functional Locations



1. The **Functional Locations** screen will be displayed.

SELECT THE SITE

2. The **Site** filter will be set according to your company configuration.
3. You do not need to select a specific site, however if you wish to narrow your filter parameters, you can click on the **drop-down arrow** and select a particular site from the list.
    - For a detailed handling of this topic refer to Site Selection.

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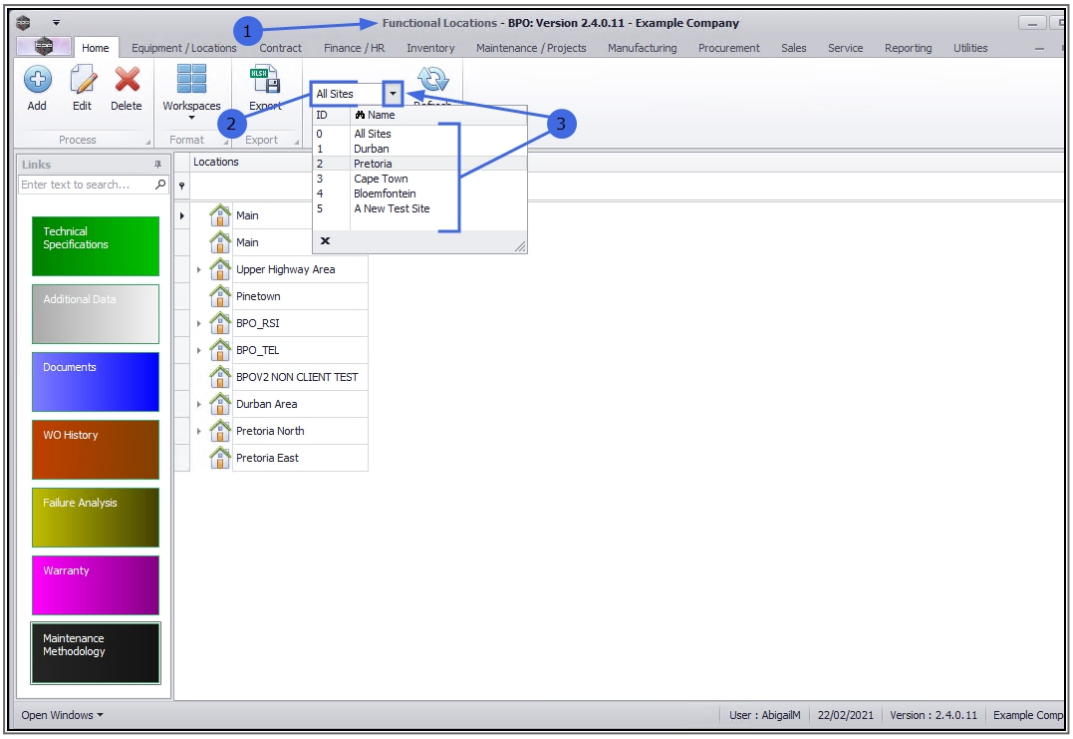

SELECT THE LOCATION

1. Select the **row** of the **location** where you wish to link Maintenance Tasks.

MAIN LOCATION

2. If the Maintenance Methodology is to be linked to a **main** location, select the **row** of that main location. In this example, **Upper Highway Area** is a main location.

SUB-LOCATION

3. If the Maintenance Methodology is to be linked to a **sub-location**, ensure that you **expand** the main (parent) location to be able to view and select the row of that sub-location. In this example, **Hillcrest** and **Kloof** are sub-locations of Upper Highway Area.

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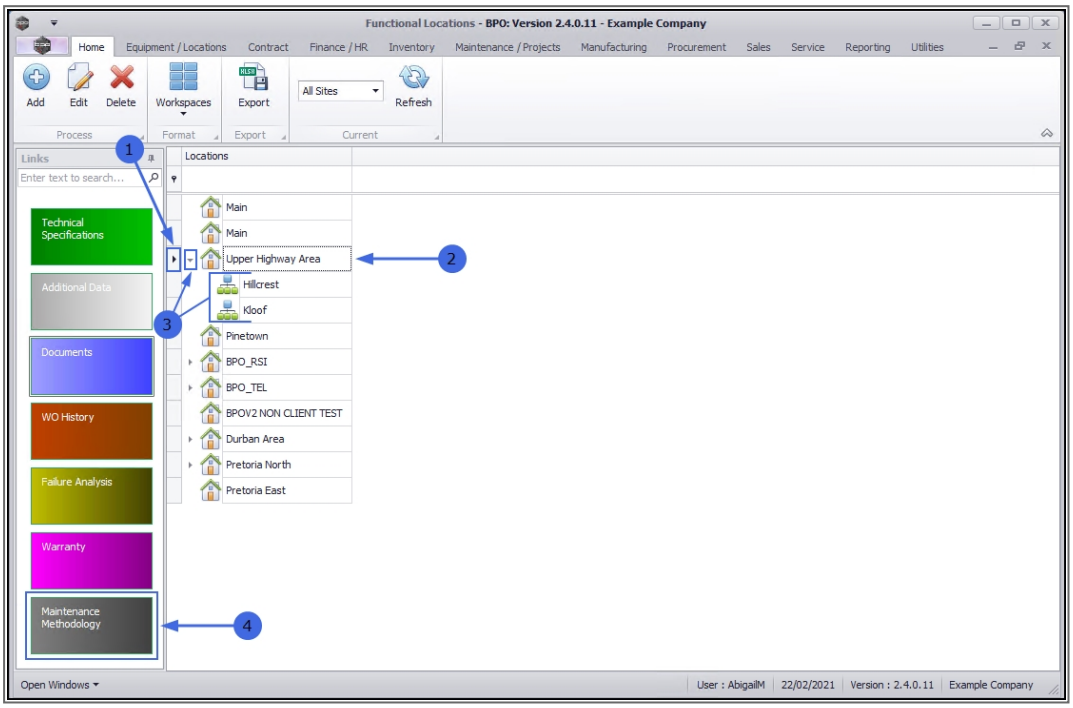
VIEW MAINTENANCE METHODOLOGY

1. When you have selected the right location, click on the **Maintenance Methodology** tile.



1. The **Maintenance Methodology for location: []** screen will open.

ADD NEW TASK SCHEDULE

1. Click on **Add**.

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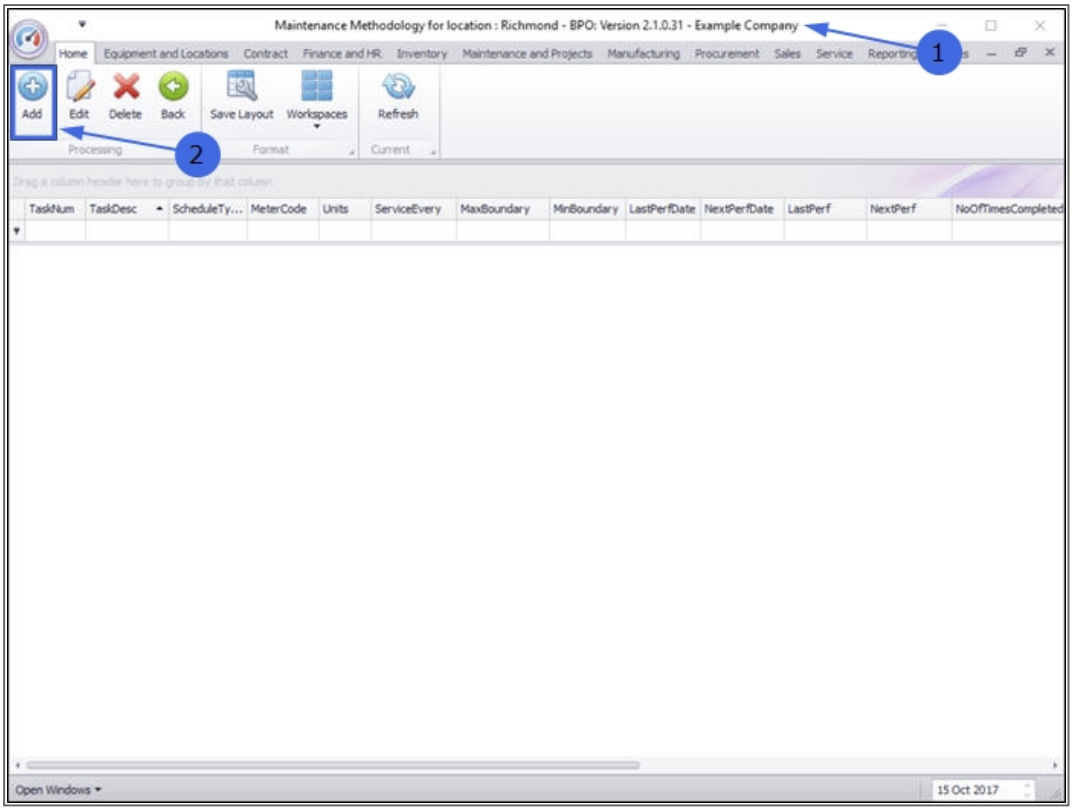

1. The **Add new task schedule** screen will open.
2. Click on the **search** button in the **Task Num** field.

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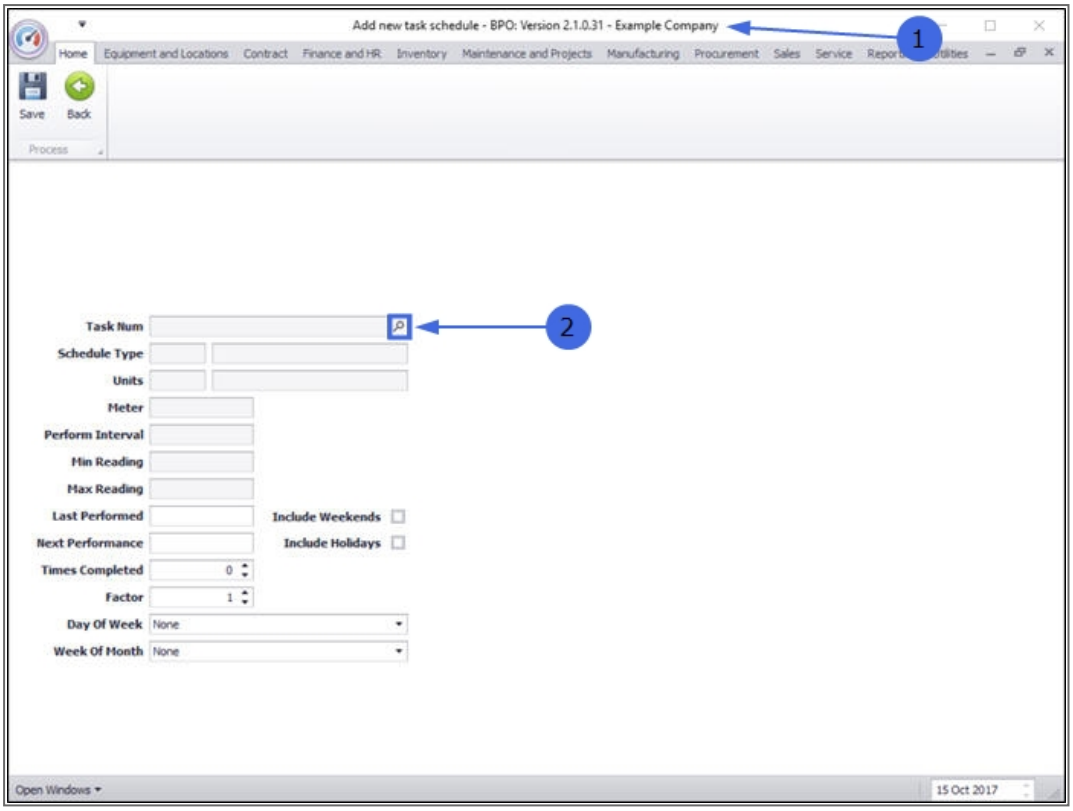

1. The **Select the task schedule** screen will pop up.
2. Select the **row** of the **task schedule** you wish to link to this location.
3. Click on **Ok**.

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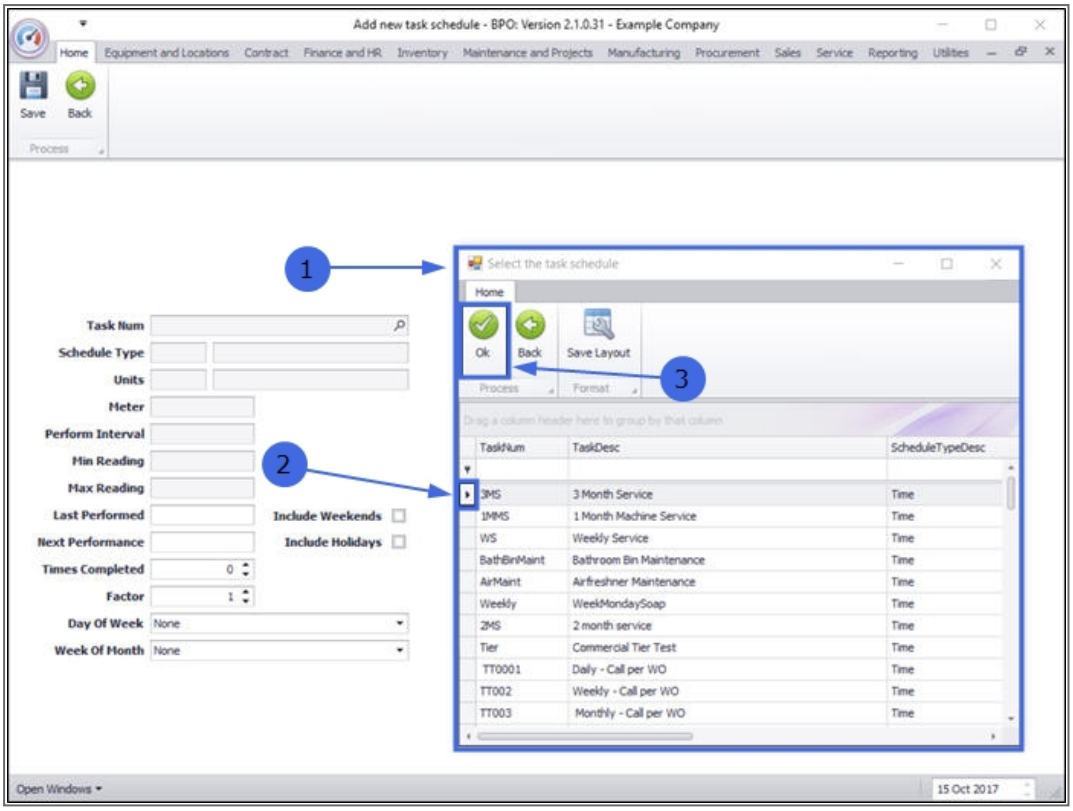

TASK SCHEDULE DETAILS

- The **Schedule Type**, **Units**, **Meter**, **Min Reading**, and **Max Reading** fields will populate automatically according to your **Task Num** choice.

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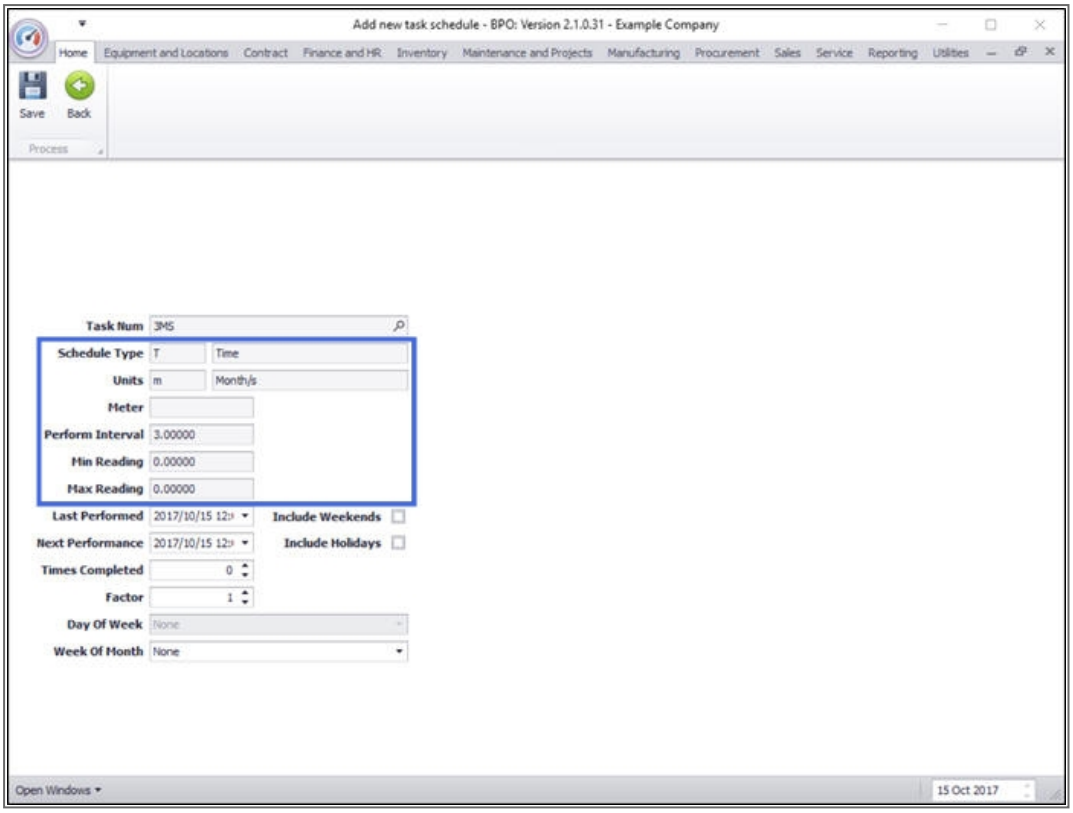

- **Last Performed**: Click on the drop-down arrow and use the calendar function to select the date this task was last performed.
- **Next Performance**: Click on the drop-down arrow and use the calendar function to select the date this task will next be due.
- **Times Completed**: Type in or use the arrow indicators to select the number of times this task has been done.
- **Factor**: Type in or use the arrow indicators to select the amount by which to multiply the bill of materials on this task (for example, the task has a BOM to request and issue **1** bottle of disinfectant, but it is a large room - so you need **2** bottles. Type in **2** and this will be multiplied by the **1** from the Task Bill of Materials).

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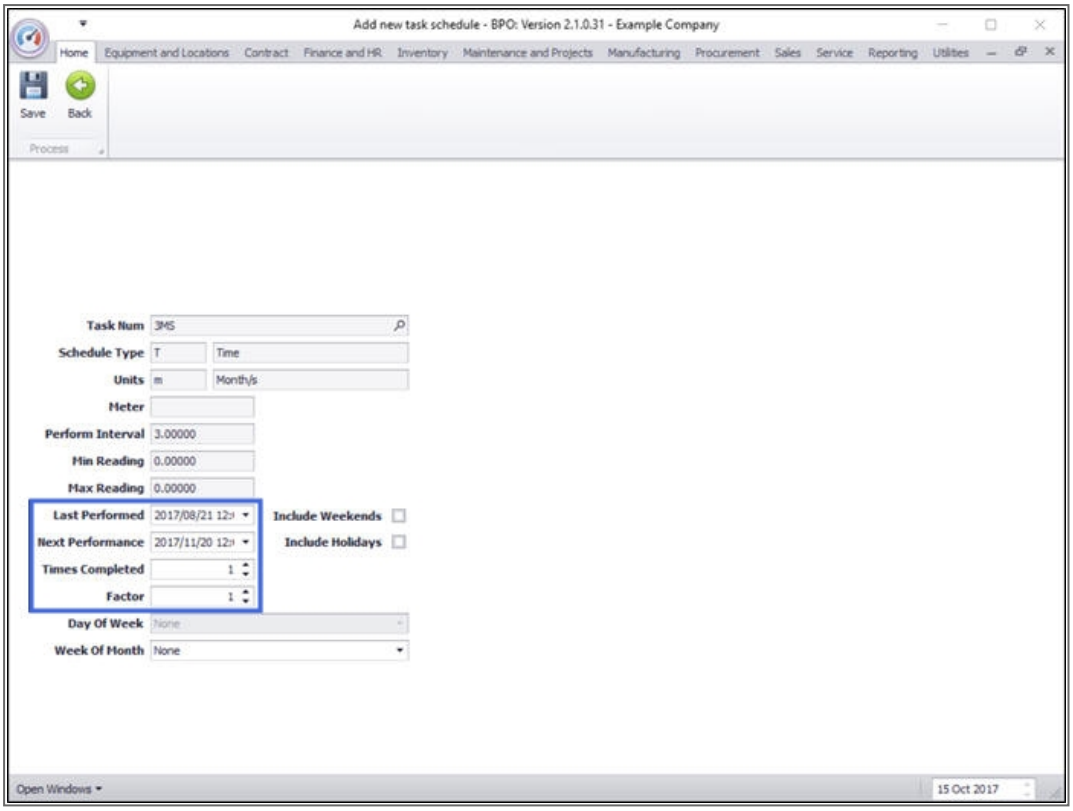

1. **Includes Weekends / Includes Holidays:** Select whether you want the task to generate on **Weekends** and/or **Holidays** (if unselected, the task will not generate on a Weekend or Public Holiday (as configured in Scheduling).
2. **Day of Week / Week of Month:** For monthly tasks, if you have a preferred day for the tasks to generate, then select **Day of the Week** and **Week of the Month**.

SAVE TASK SCHEDULE

3. When you have finished filling in the Task Schedule details, click on **Save.**

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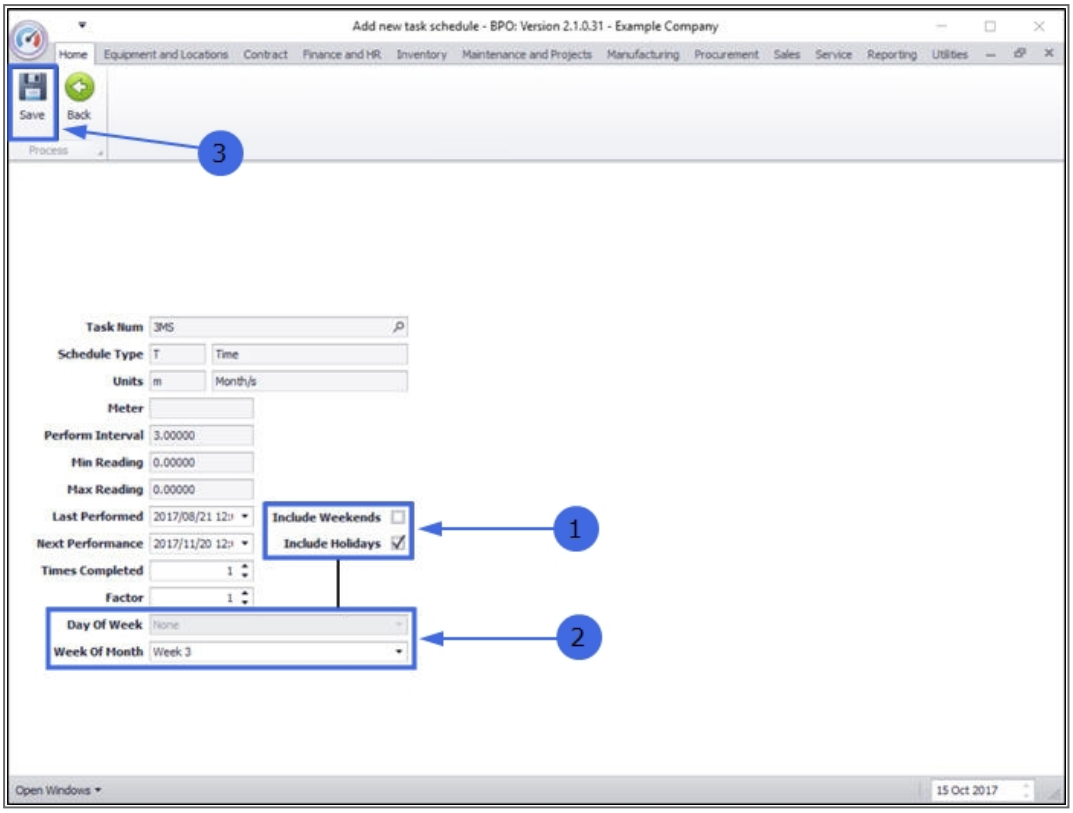

VIEW NEW LOCATION TASK SCHEDULE

- You can now view the new **Maintenance Task** in the **Maintenance Methodology for location: []** screen.

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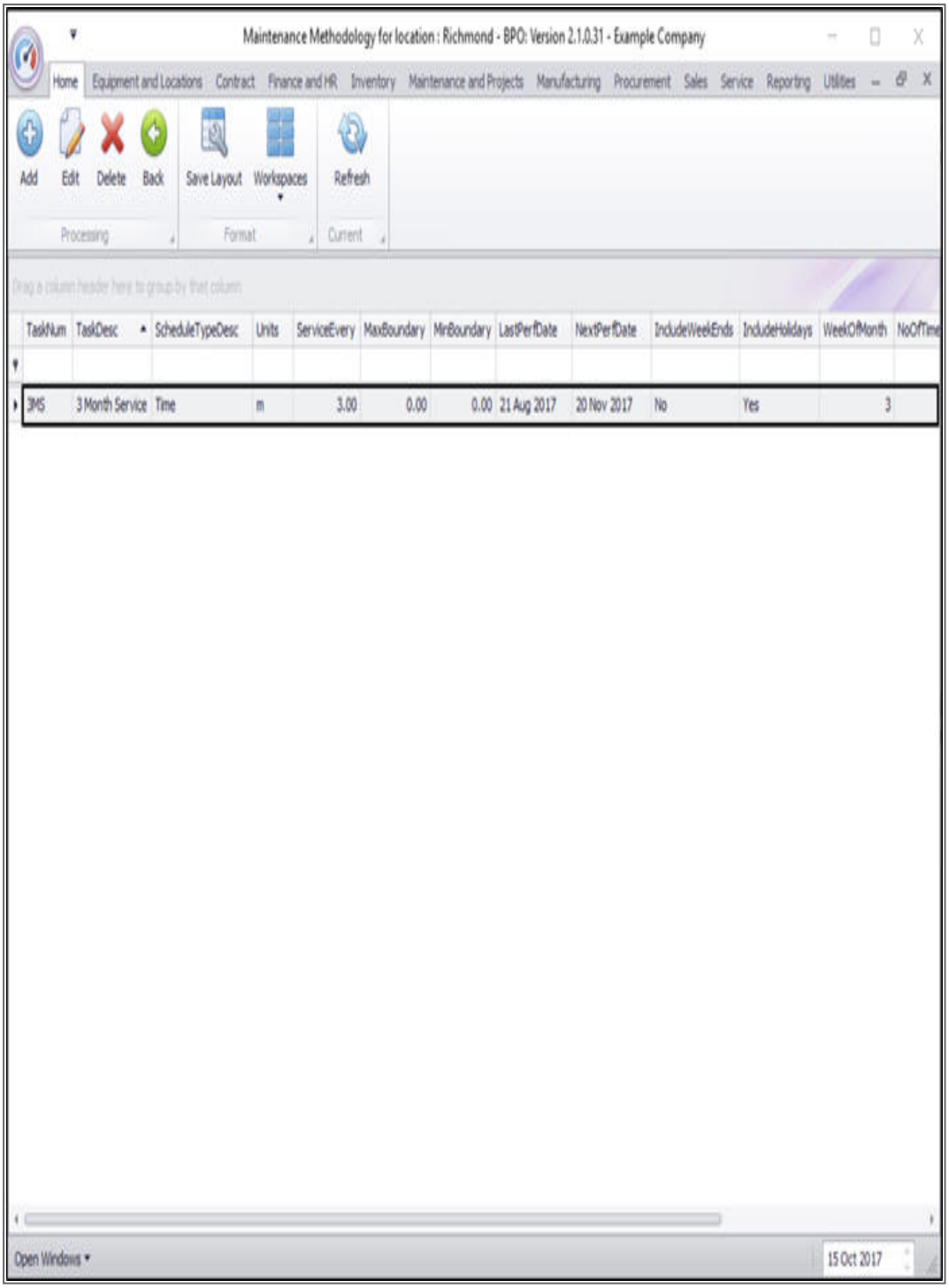

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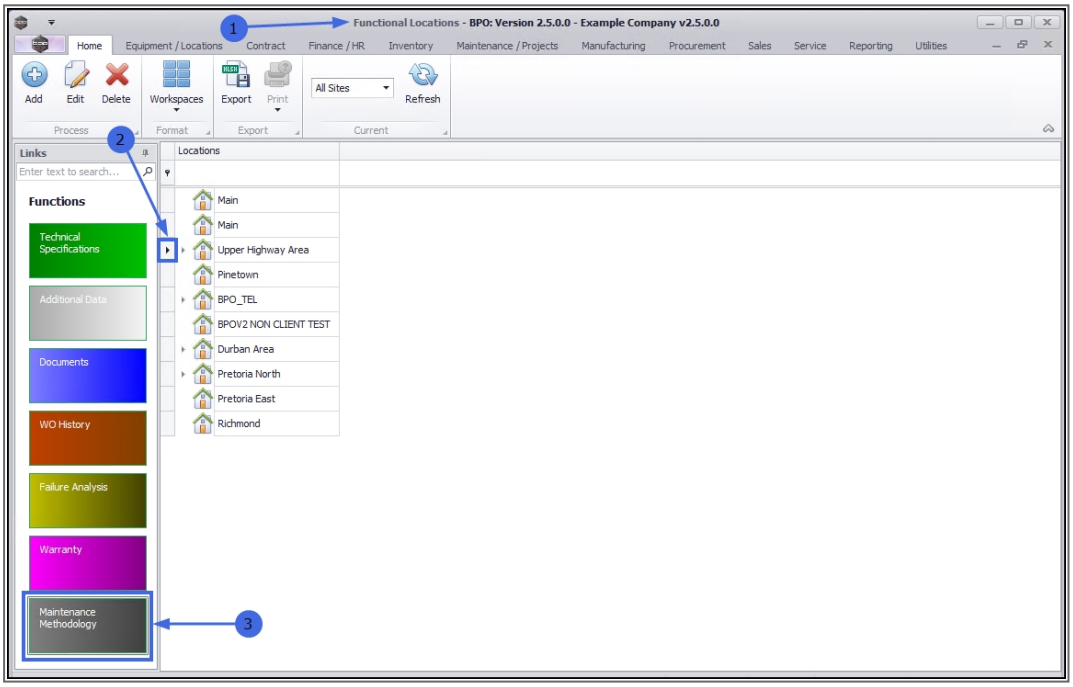
EDIT LOCATION TASK SCHEDULE

SELECT LOCATION

1. In the **Functional Locations** screen,
2. Select the location where you wish to **edit** the task schedule.

SELECT MAINTENANCE METHODOLOGY

3. Click on the **Maintenance Methodology** tile.



1. The Maintenance **Methodology for location: [ ]** screen will open.

SELECT TASK

2. If there is more than one row in the data grid, select the **row** of the task where you wish to make changes.
3. Note that this task can currently be performed on **weekends** and **public holidays**. This will be edited in the next screen.

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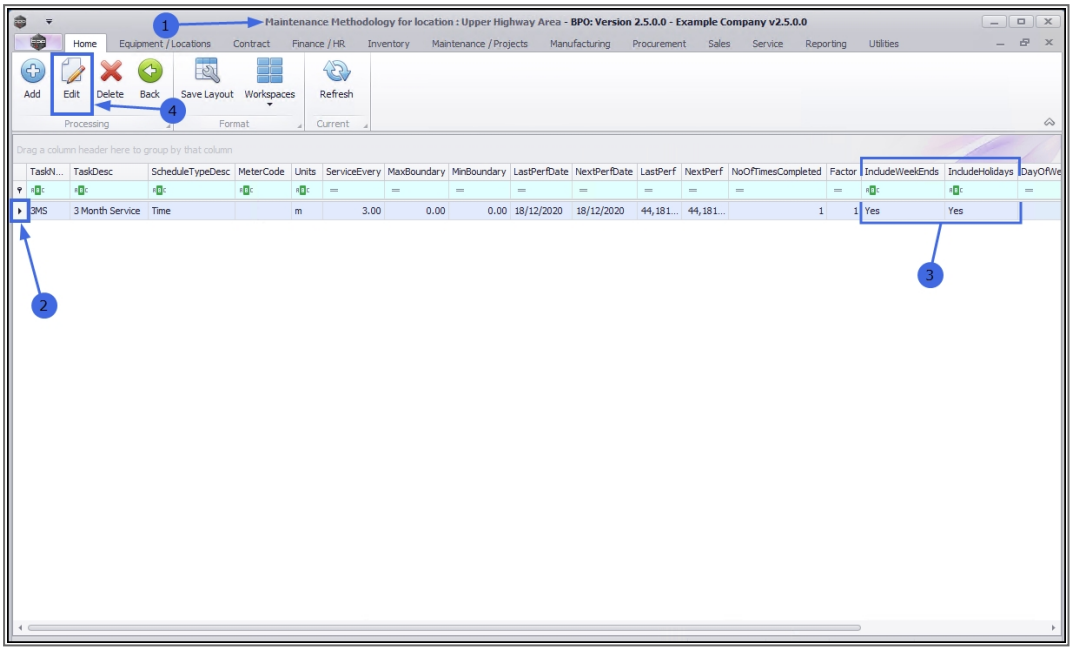
EDIT TASK

4. Click on **Edit**.



1. The **Edit task schedule** screen will open.
2. Only the fields within the highlighted sections can be edited from this screen.
3. In this example, the **Include Weekend** and **Include Holidays** check boxes are to be deselected so that tasks cannot be performed on those days.

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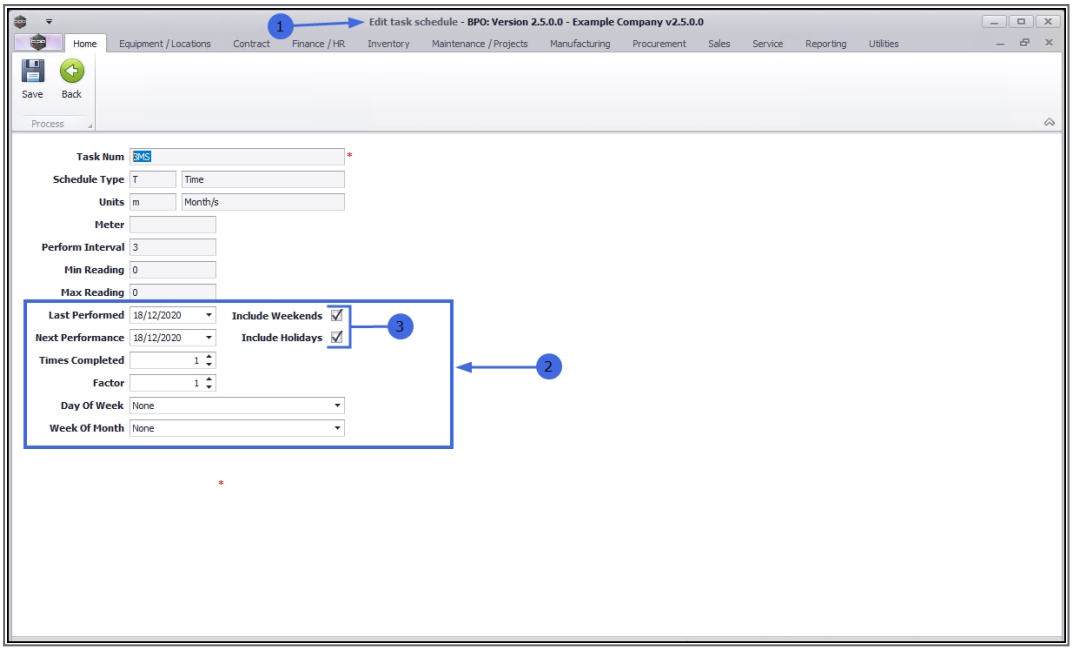

1. Edit the required fields.
    - In this example, both the **Include Weekends** and **Include Holidays** check boxes have now been deselected, indicating that tasks can no longer be performed on those days if the scheduled task date should fall on either a Saturday or Sunday or on a public holiday.

SAVE CHANGES

2. Click on **Save**.

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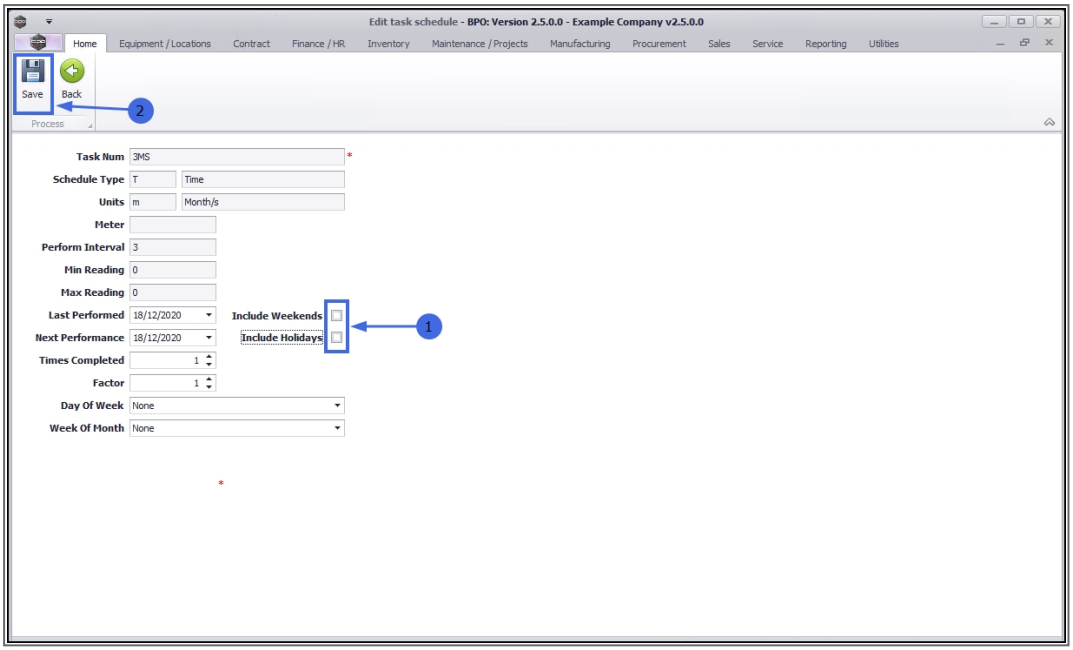
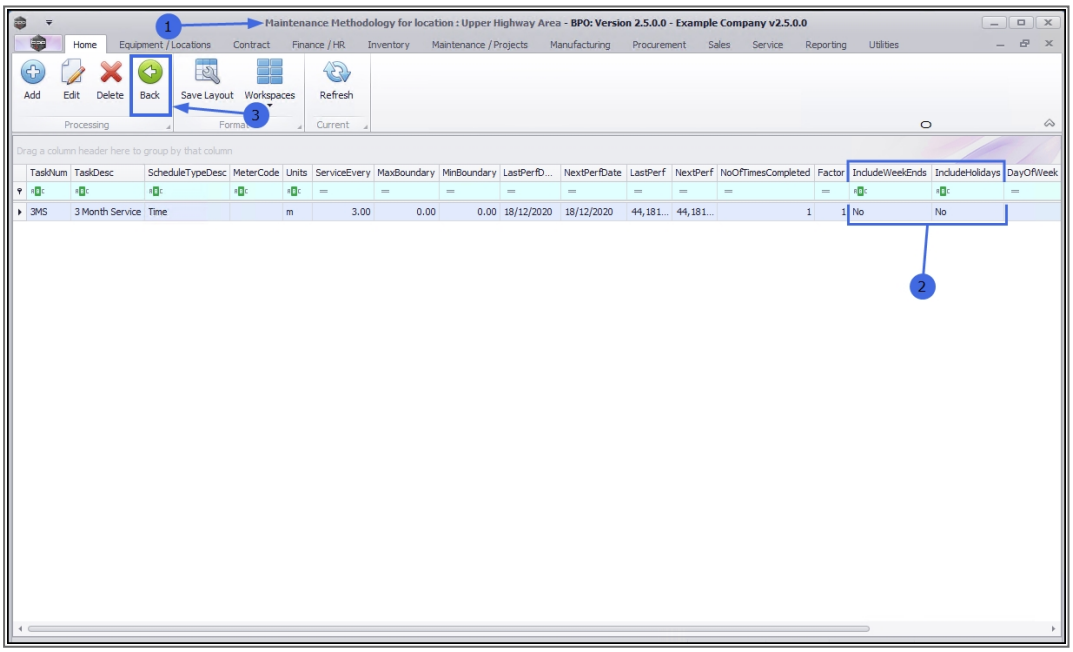


1. You will return to the Maintenance Methodology for location: [] screen.
2. Note that the **Include Weekends** and **Include Holidays** columns have been updated to '**No**' as per the changes made in the previous screen.
3. Click on **Back** to return to the **Functional Locations** Listing screen.



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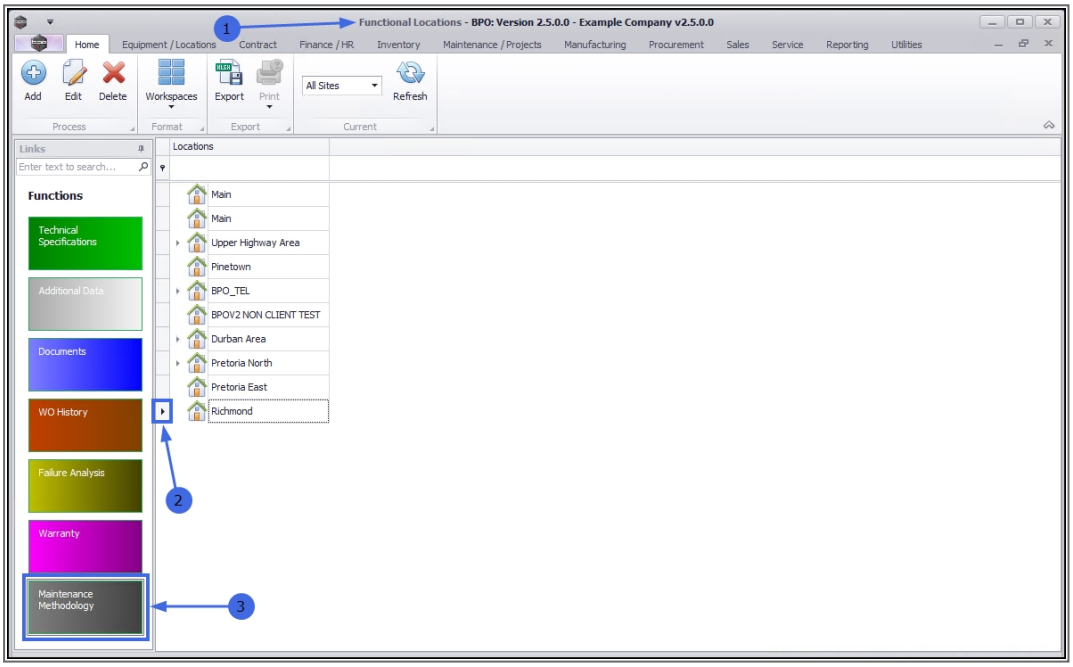
DELETE TASK SCHEDULE

SELECT TASK

1. In the **Functional Locations** screen,
2. Select the location where you wish to **delete** the task schedule.

SELECT MAINTENANCE METHODOLOGY

3. Click on the **Maintenance Methodology** tile.



1. The Maintenance **Methodology for location: []** screen will open.

SELECT TASK

2. If there is more than one row in the data grid, select the **row** of the task that you wish to remove.

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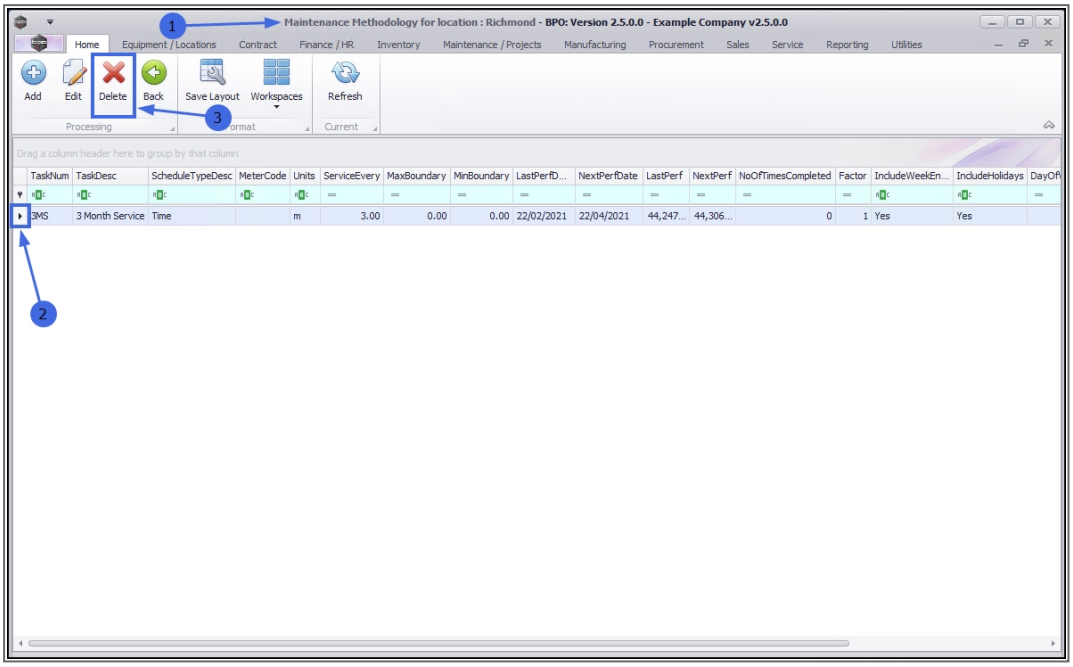
DELETE TASK

3. Click on **Delete**.



CONFIRM DELETION

1. A **Delete Task Schedule** message box will pop up with the following prompt:
    - Are you sure you want to remove this task schedule?
2. Click on **Yes**.

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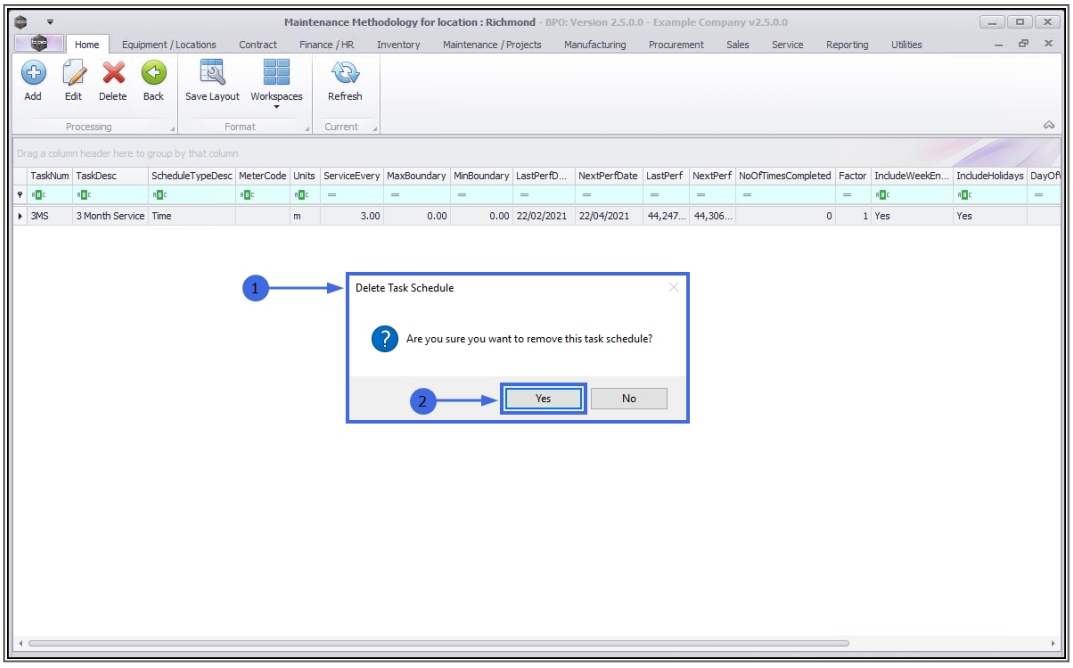
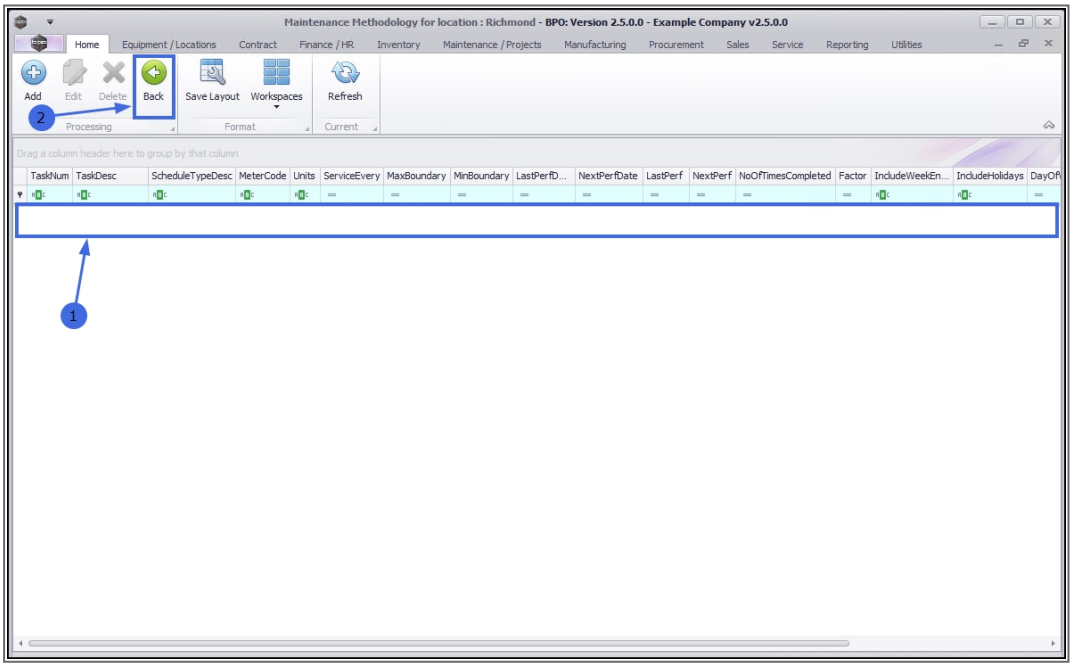


VIEW DELETION RESULTS

1. The selected task schedule will be **removed** from the screen.
2. Click on **Back** to return to the **Functional Locations** screen.



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Related Topics

- Introduction to Functional Locations
- Add a New Functional Location
- Edit a Functional Location
- Delete a Functional Location
- Location - Technical Specifications
- Location - Additional Data
- Location - Documents
- Location - Work Order History
- Location - Failure Analysis
- Location - Warranty
- Location - Add a New Location Contract

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