

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

## EQUIPMENT

### ASSETS - MAINTENANCE

(Assign a Task)

To generate a call from this task using the **task radar**, the machine should be on an **active contract** with a **contact person** assigned.

Also remember to check that **the task** has been set up correctly.

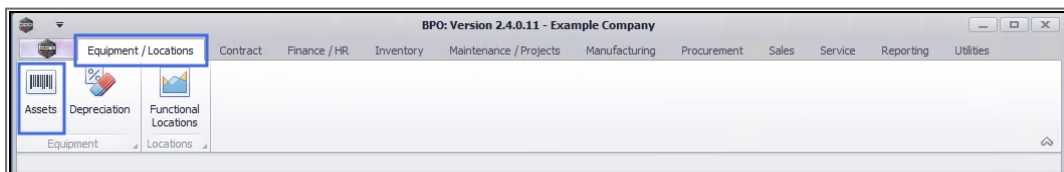
There are two types of **Task Interval Types** that can be assigned to an asset:

- **Condition**-based task schedules: These are usually meter definition based, e.g. **Copies Made**.
- **Time**-based task schedules: These are linked to time periods e.g. **Days, Weeks, Months** or **Years**.
- [Add new Condition-based Task Schedule](#)
- [Add new Time-based Task Schedule](#)

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**Ribbon Access:** Equipment and Locations > Assets

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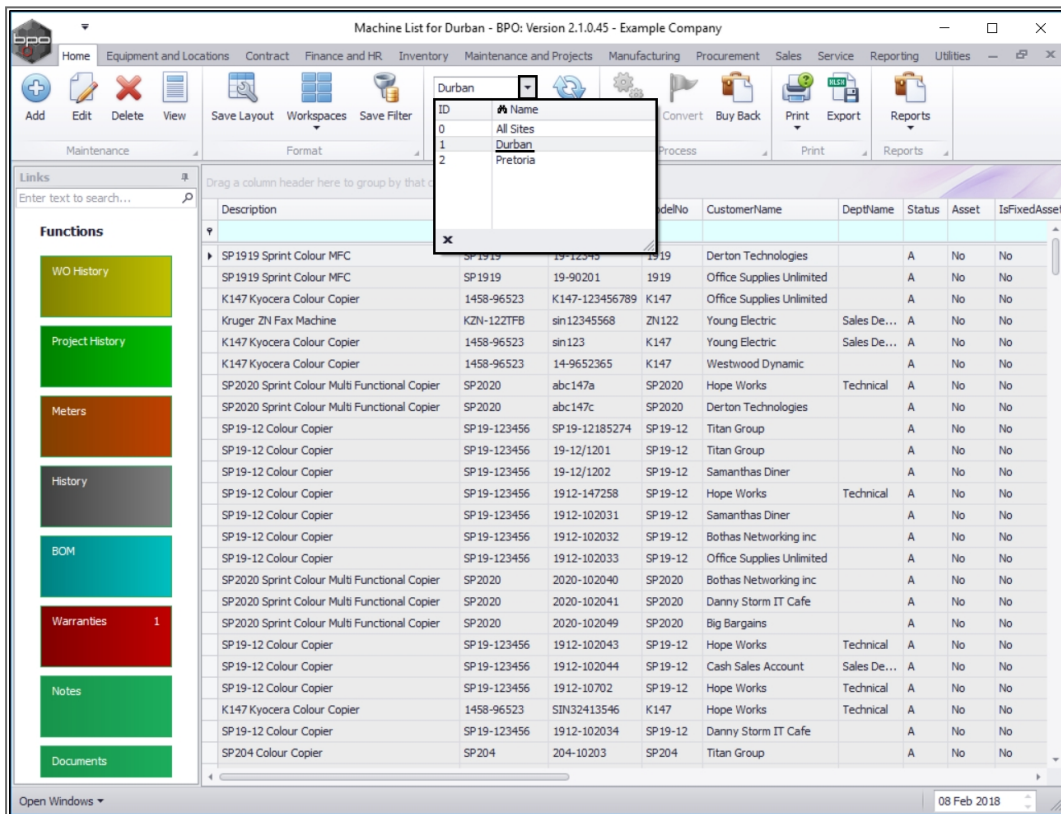
The **Machine List** for **[ ]** screen will be displayed.

## THE SITE AND TYPE FILTERS

The screen will open with the default **Site** setting configured on the user and the Equipment **Type** filter set to 'All' (machines).

**Note:** Refer to [Site Selection](#) for more information about Site settings.

- You do not need to select a specific **Site** or **Type** in this screen, however, if you wish to narrow your filter parameters, you can click on the **drop-down arrows** and select a particular Site and Type from the list.
- In this example, the **Durban** site is selected.



## SELECT ASSET

- Select the **row** of the **serialised item** where you wish to **assign a task**.
- Click on the **Maintenance** tile.

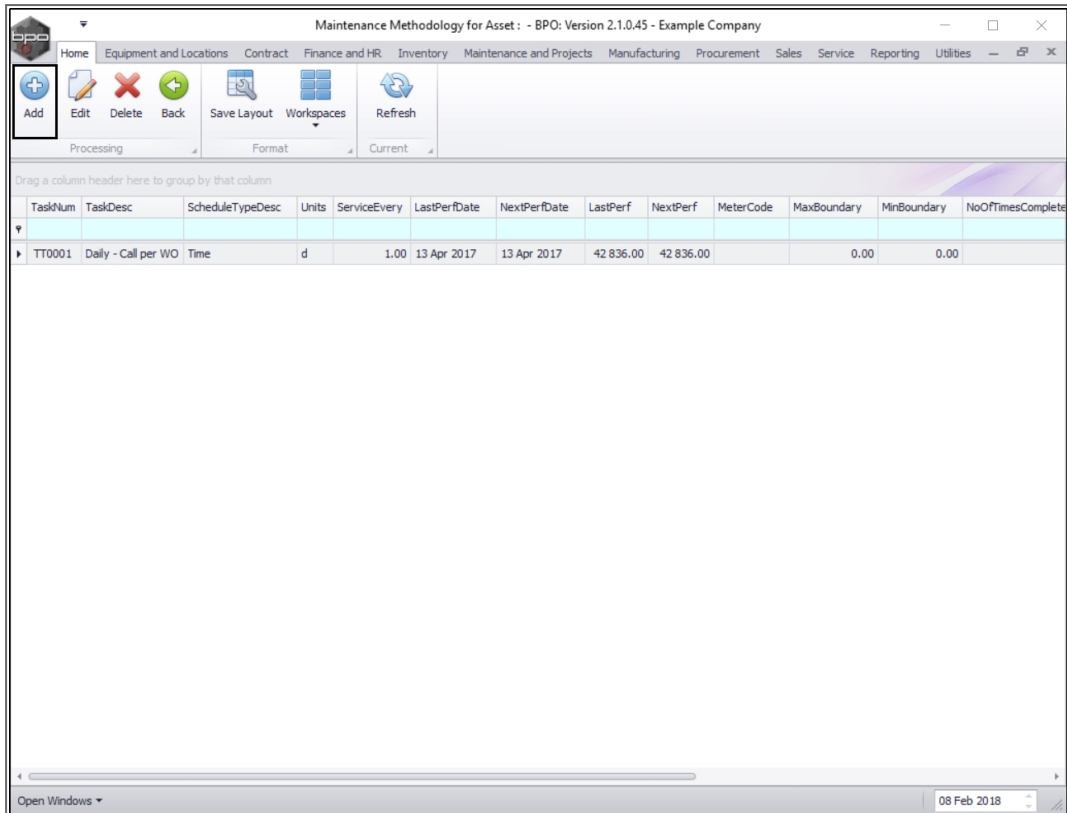
The screenshot displays the 'Machine List for Durban - BPO: Version 2.1.0.45 - Example Company' window. The interface includes a top menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with various icons for actions such as Add, Edit, Delete, View, Save Layout, Workspaces, Save Filter, Refresh, Revalue, Convert, Buy Back, Print, Export, and Reports. A left-hand navigation pane contains several tiles: Meters, History, BOM, Warranties (with a '1' indicator), Notes, Documents, Maintenance (highlighted with a red box), and Depreciation. The main area shows a table of assets with the following columns: Description, PartCode, SerialNo, ModelNo, CustomerName, DeptName, Status, Asset, and IsFixedAsset. The table contains multiple rows of asset data, including various models of copiers and their associated details.

Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	Status	Asset	IsFixedAsset
SP1919 Sprint Colour MFC	SP1919	19-12345	1919	Derton Technologies		A	No	No
SP1919 Sprint Colour MFC	SP1919	19-90201	1919	Office Supplies Unlimited		A	No	No
K147 Kyocera Colour Copier	1458-96523	K147-123456789	K147	Office Supplies Unlimited		A	No	No
Kruger ZN Fax Machine	KZN-122TFB	sin1234568	ZN122	Young Electric	Sales De...	A	No	No
K147 Kyocera Colour Copier	1458-96523	sin123	K147	Young Electric	Sales De...	A	No	No
K147 Kyocera Colour Copier	1458-96523	14-9652365	K147	Westwood Dynamic		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147a	SP2020	Hope Works	Technical	A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	abc147c	SP2020	Derton Technologies		A	No	No
SP19-12 Colour Copier	SP19-123456	SP19-12185274	SP19-12	Titan Group		A	No	No
SP19-12 Colour Copier	SP19-123456	19-12/1201	SP19-12	Titan Group		A	No	No
SP19-12 Colour Copier	SP19-123456	19-12/1202	SP19-12	Samanthas Diner		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-147258	SP19-12	Hope Works	Technical	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102031	SP19-12	Samanthas Diner		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102032	SP19-12	Bothas Networking inc		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102033	SP19-12	Office Supplies Unlimited		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102040	SP2020	Bothas Networking inc		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102041	SP2020	Danny Storm IT Cafe		A	No	No
SP2020 Sprint Colour Multi Functional Copier	SP2020	2020-102049	SP2020	Big Bargains		A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102043	SP19-12	Hope Works	Technical	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102044	SP19-12	Cash Sales Account	Sales De...	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-10702	SP19-12	Hope Works	Technical	A	No	No
K147 Kyocera Colour Copier	1458-96523	SIN32413546	K147	Hope Works	Technical	A	No	No
SP19-12 Colour Copier	SP19-123456	1912-102034	SP19-12	Danny Storm IT Cafe		A	No	No
SP204 Colour Copier	SP204	204-10203	SP204	Titan Group		A	No	No

## ADD NEW TASK

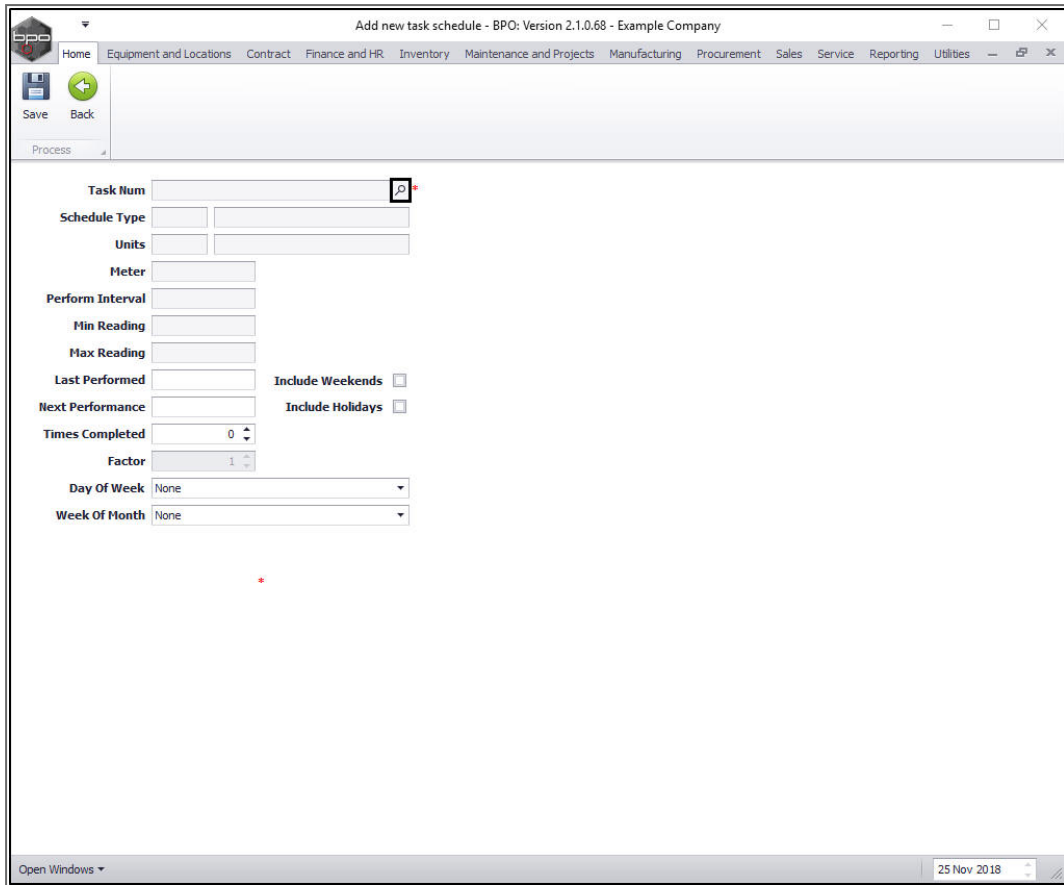
The **Maintenance Methodology for Asset:** screen will be displayed.

- Click on **Add**.



The **Add new task schedule** screen will be displayed.

- **Task Num:** Click on the **search** button in this field.



## TASK SCHEDULE OPTIONS

The **Select the task schedule** pop up screen will appear.

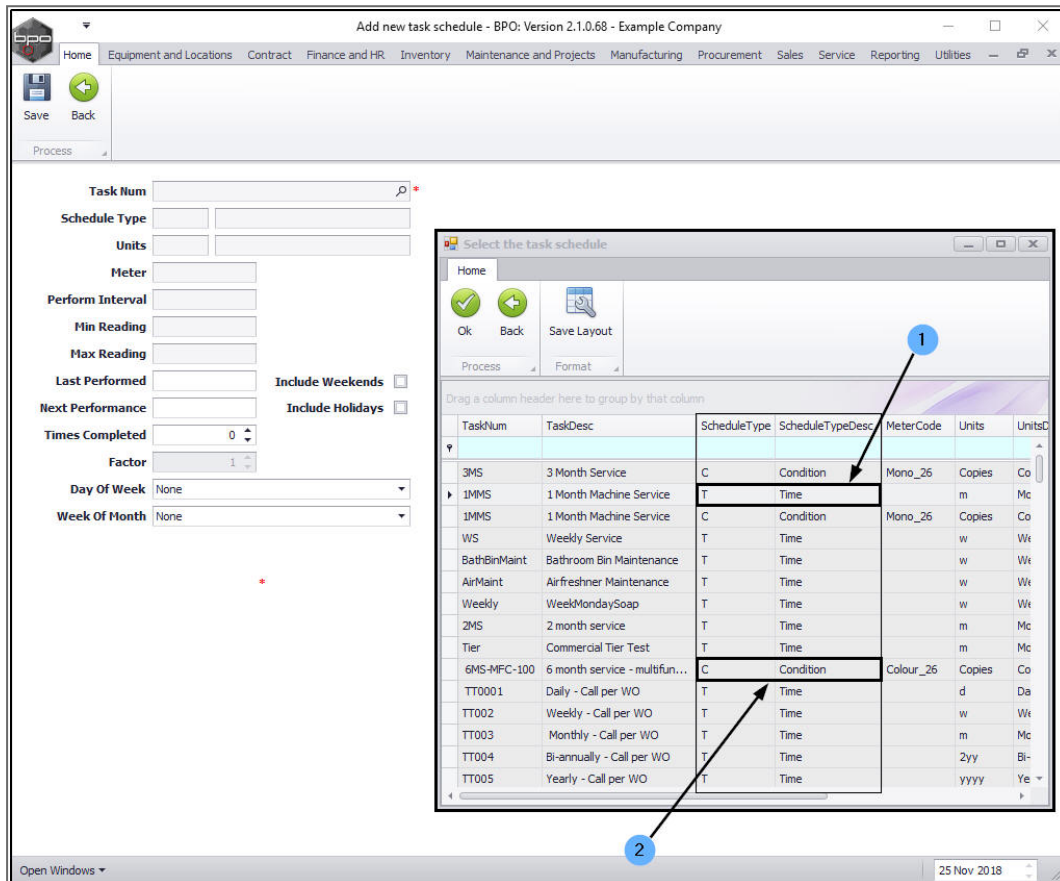
You will note in this screen that there are **2** types of schedule to select from:

### Time Based Schedule

1. If a **time**-based schedule is selected - then certain fields will auto populate the Add new task schedule screen and the **Last Performance** and **Next Performance** fields will be based on **date selections**.

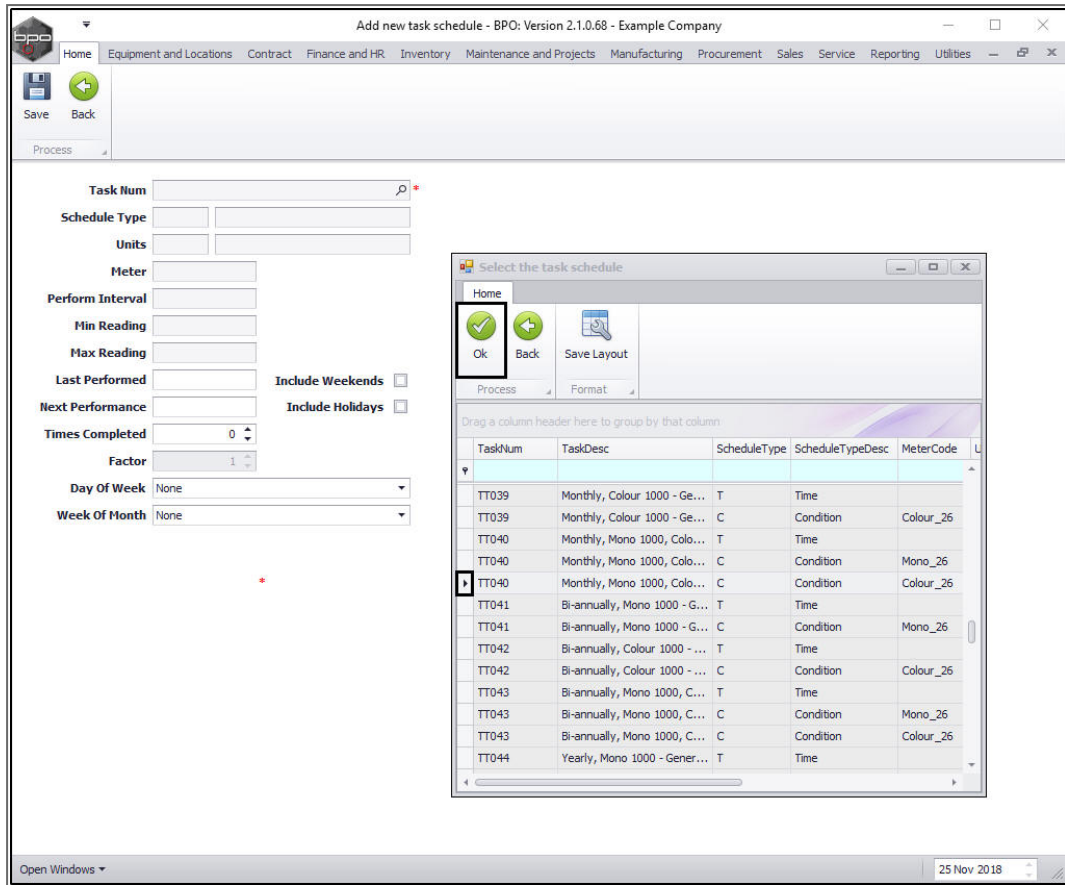
## Condition Based Schedule

2. **Condition:** if a **condition**-based schedule is selected - then certain fields will auto populate the Add new task schedule screen and the **Last Performance** and **Next Performance** fields will be based on **meter readings**.



## ADD CONDITION-BASED TASK SCHEDULE

- Select the **row** of the **condition**-based task schedule that you wish to add to the asset.
- Click on **Ok**.

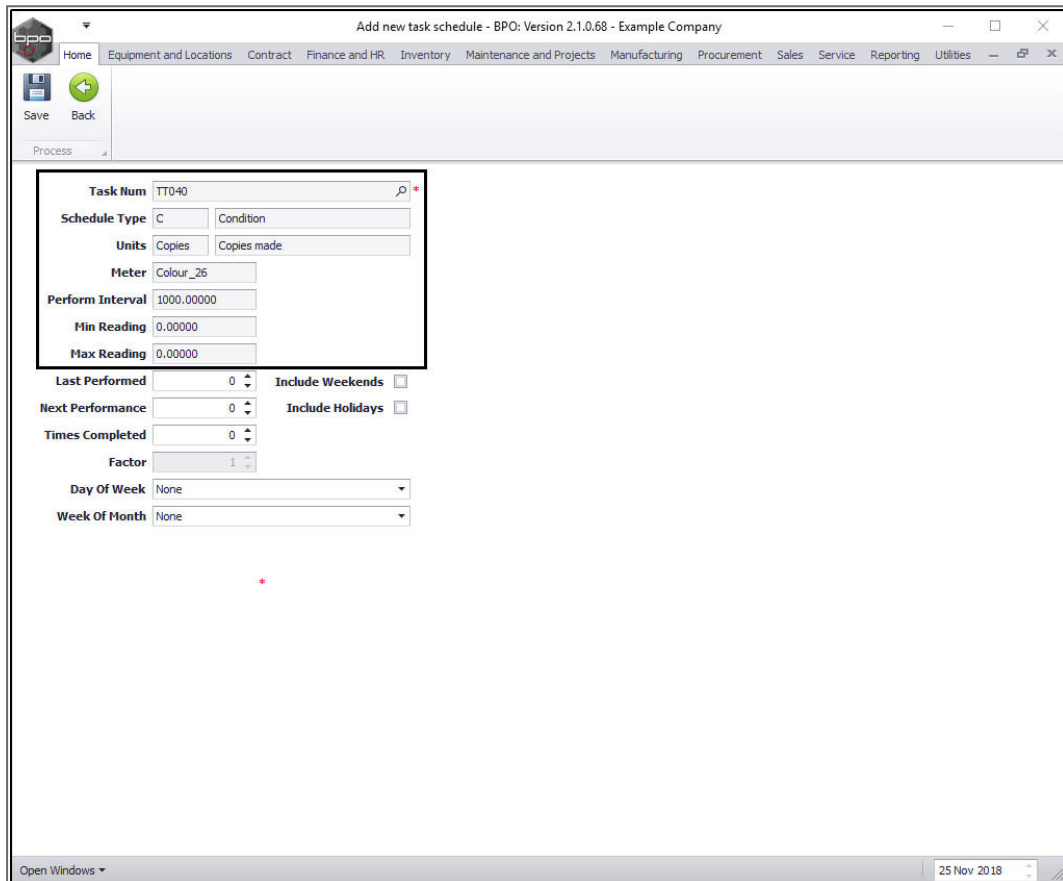


## ADD TASK DETAILS

- **Task Num:** This will auto populate with the task number selected in the previous step.
- **Schedule Type:** This will auto populate with the schedule type set up on the selected task, in this case 'Condition'.
- **Units:** This will auto populate with the unit type set up on the selected task. (As this is a condition-based schedule this will auto populate with **Copies - Copies Made**).
- **Meter:** This will auto populate with the meter that is linked to the selected task.
- **Perform Interval:** This will auto populate with the performance interval rate set up on the selected task, if applicable. (As this is a

**condition**-based schedule this will auto populate with the number of copies that will be made before the performance schedule will be triggered).

- **Min Reading:** This will auto populate with the minimum reading amount set up on the selected task, if applicable.
- **Max Reading:** This will auto populate with the maximum reading amount set up on the selected task, if applicable.



## 2. Performance Details

- **Last Performed:** Either type in or use the directional arrows to select the amount of the last meter reading.
- **Next Performance:** Either type in or use the directional arrows to select the amount when the next meter reading should be taken.

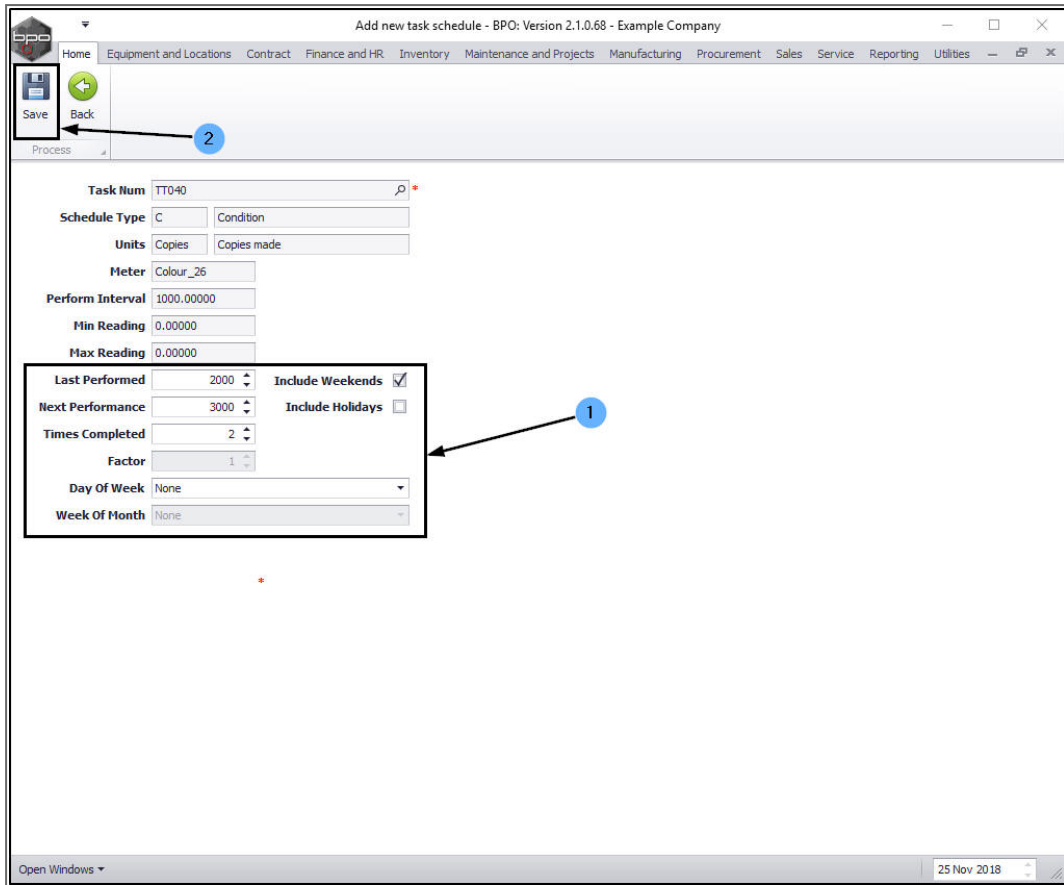


- **Times Completed:** Type in the number of times this task has been done.
- **Factor:** This will auto populate with 1 and is un-editable.
- **Include Weekends** Select this check box if you wish this task to be generated on a weekend. (If unselected, the task will not generate on a Weekend (as configured in Scheduling).
- **Include Holidays** Select this check box if you wish this task to be generated on a public holiday. (If unselected, the task will not generate on a Public Holiday (as configured in Scheduling).
- **Day of the Week** and **Week of the Month** For monthly tasks, if you have a preferred day for the tasks to generate, then click on the drop-down arrow and select from the menu the **Day of the Week** and **Week of the Month**.

### **SAVE TASK SCHEDULE**

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3. When you have finished adding details to this screen, click on **Save**.



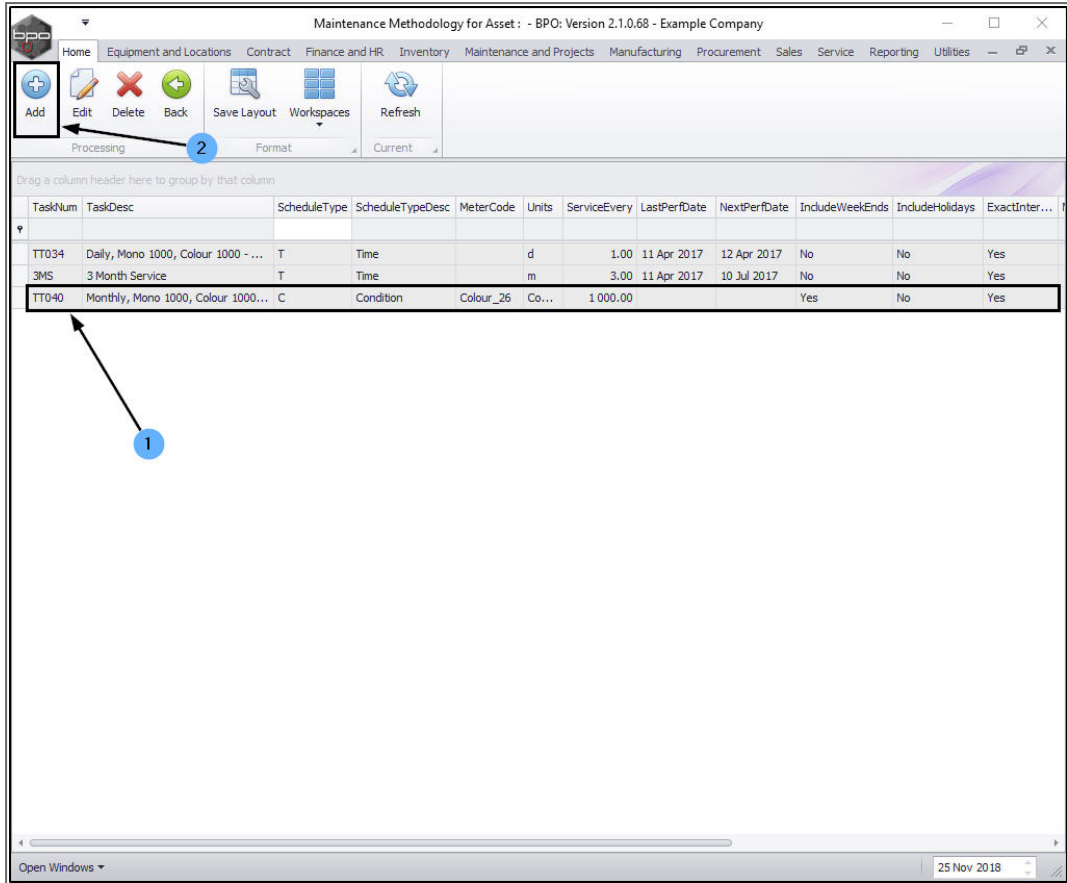
You will return to the **Maintenance Methodology for Asset:** screen.

## VIEW TASK SCHEDULE

1. Here you can view the new 'condition' task has now been linked to the asset.

## ADD TIME-BASED TASK SCHEDULE

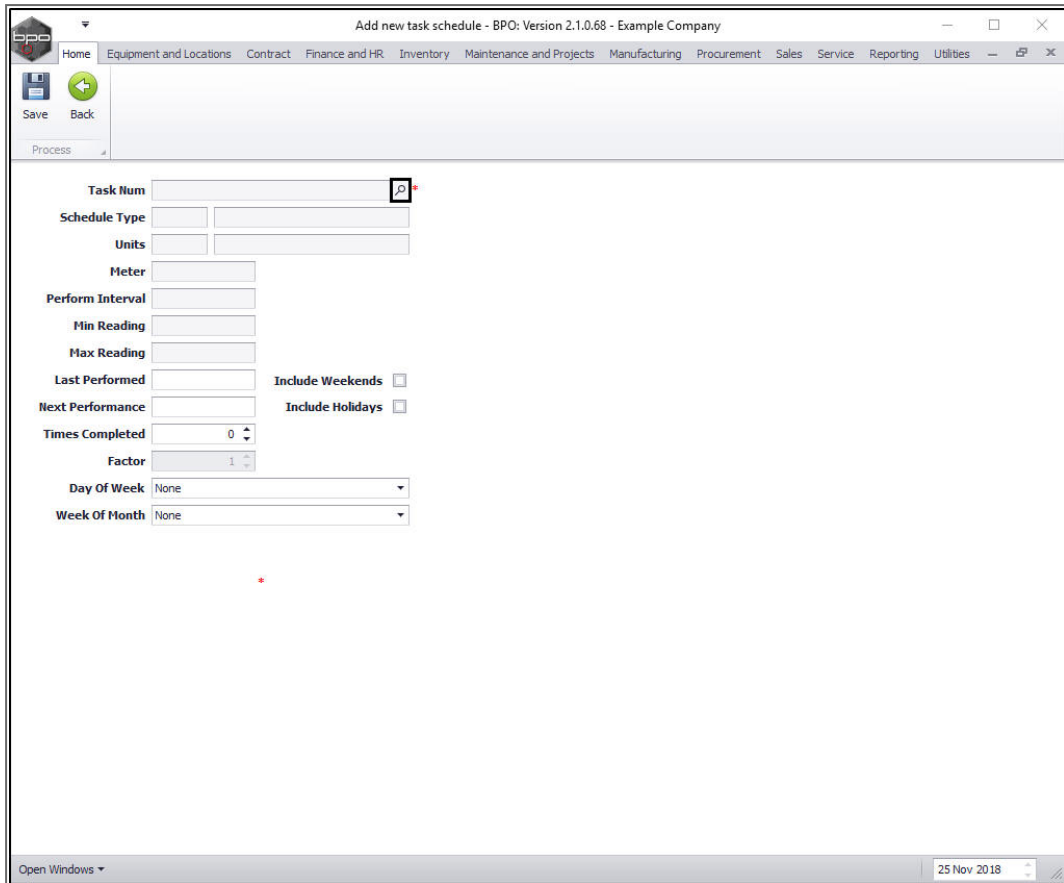
2. Click on **Add**.



The **Add new task schedule** screen will be displayed.

## SELECT TASK SCHEDULE

- **Task Num:** Click on the **search** button in this field.



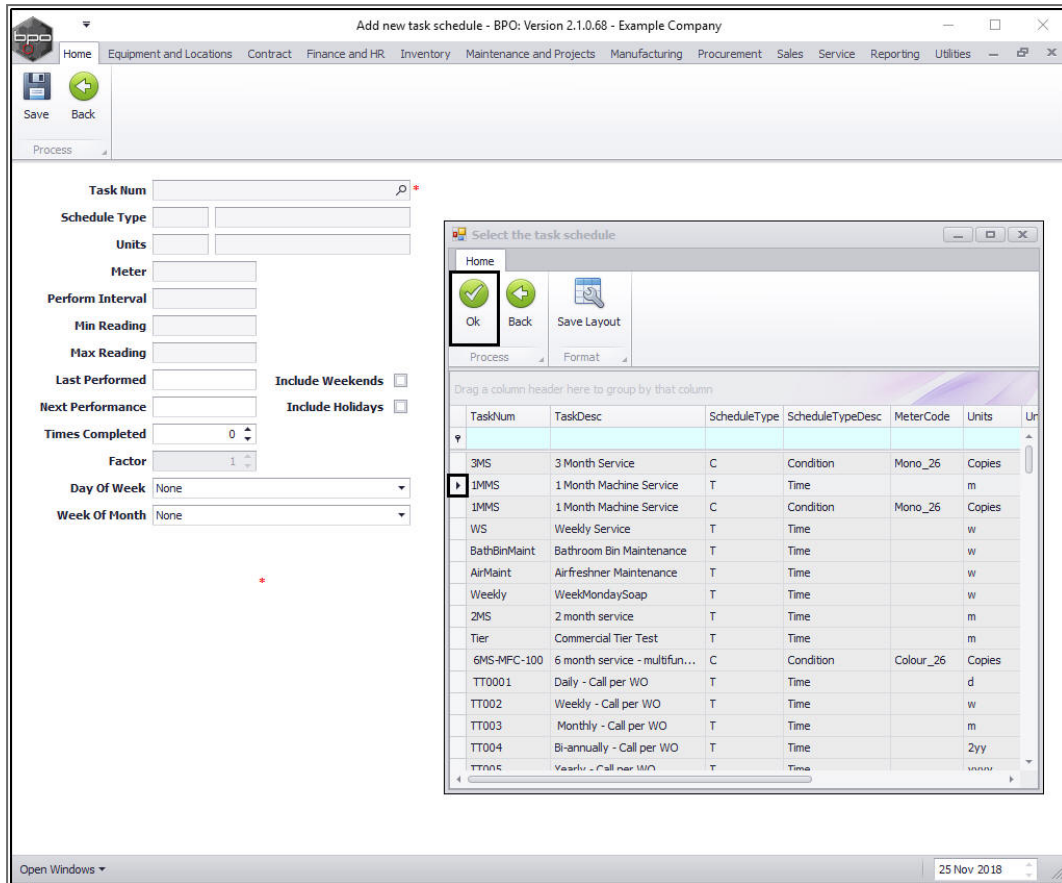
The screenshot shows a web application window titled "Add new task schedule - BPO: Version 2.1.0.68 - Example Company". The window has a navigation menu at the top with items like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu are "Save" and "Back" buttons. The main content area contains a form with the following fields and options:

- Task Num:  (with a small icon to the right)
- Schedule Type:
- Units:
- Meter:
- Perform Interval:
- Min Reading:
- Max Reading:
- Last Performed:   Include Weekends
- Next Performance:   Include Holidays
- Times Completed:
- Factor:
- Day Of Week:
- Week Of Month:

At the bottom of the window, there is an "Open Windows" dropdown and a date field showing "25 Nov 2018".

The **Select the task schedule** pop up screen will appear.

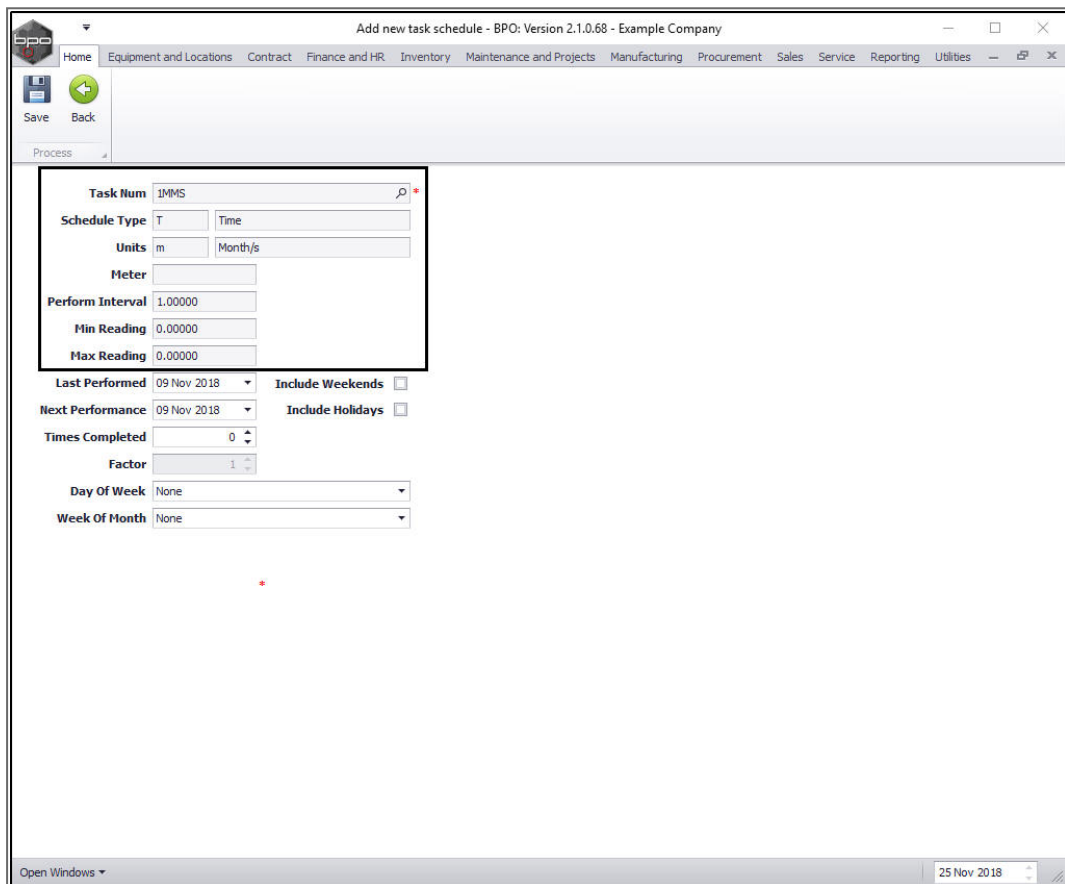
- Select the **row** of the **'time'** task schedule that you wish to add to the asset.
- Click on **Ok**.



## ADD TASK DETAILS

- **Task Num:** This will auto populate with the task number selected in the previous step.
- **Schedule Type:** This will auto populate with the schedule type set up on the selected task, in this case 'Time'.
- **Units:** This will auto populate with the unit type set up on the selected task. (As this is a **'time'** based schedule this could auto populate with either **d** - days, **m** - months, or **y** - years. In this case a **1**-month service has been selected therefore the units will be in **m** - months).
- **Meter:** This will be blank and un-editable.

- **Perform Interval:** This will populate depending on the schedule type e.g. **6** (for **6** months) in this example a **1**-month machine service has been selected, so the field has populated with **1** (for **1** month).
- **Min Reading:** This will auto populate with **0** as this 'time' task schedule is not linked to meters.
- **Max Reading:** This will auto populate with **0** as this 'time' task schedule is not linked to meters.



The screenshot shows a web-based form for adding a new task schedule. The form is titled "Add new task schedule - BPO: Version 2.1.0.68 - Example Company". The form contains the following fields and values:

- Task Num:** 1MMS
- Schedule Type:** T (Time)
- Units:** m (Month/s)
- Meter:** (Empty)
- Perform Interval:** 1.00000
- Min Reading:** 0.00000
- Max Reading:** 0.00000
- Last Performed:** 09 Nov 2018
- Next Performance:** 09 Nov 2018
- Times Completed:** 0
- Factor:** 1
- Day Of Week:** None
- Week Of Month:** None
- Include Weekends:**
- Include Holidays:**

## 1. Performance Details

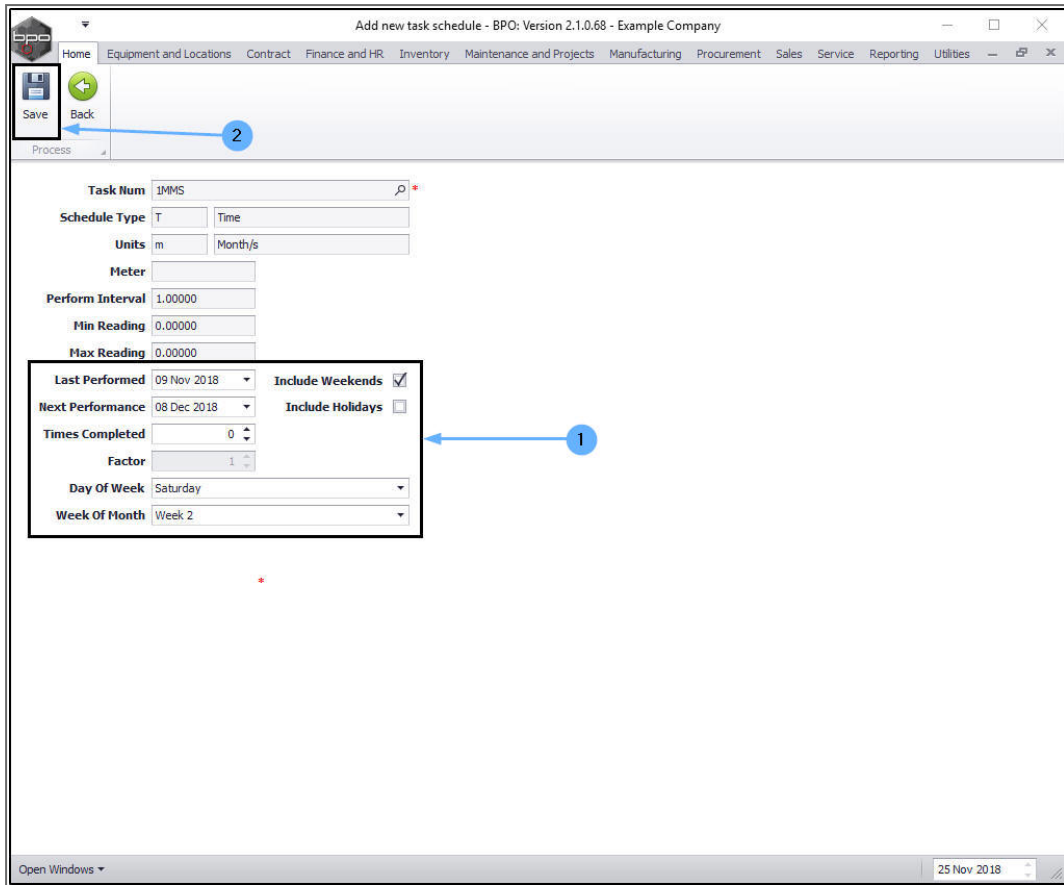
- **Last Performed:** This will populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select the date this task was last performed.

- **Next Performance:** This will populate with the current date. You can either type in or 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 the number of times this task has been done.
- **Factor:** This will auto populate with **1** and cannot be edited.
- **Include Weekends** and **Include 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).
- **Day of the Week** and **Week of the Month** For monthly tasks, if you have a preferred day for the tasks to generate, then click on the drop-down arrow and select from the menu the **Day of the Week** and **Week of the Month**.

### **SAVE TASK SCHEDULE**

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2. When you have finished adding details to this screen, click on **Save**.



## VIEW TASK SCHEDULE

- You will return to the **Maintenance Methodology for Asset:** screen.
- Here you can view the new 'time' task has now been linked to the asset.



Maintenance Methodology for Asset : - BPO; Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Refresh

Processing Format Current

Drag a column header here to group by that column

TaskNum	TaskDesc	ScheduleType	ScheduleTypeDesc	MeterCode	Units	ServiceEvery	LastPerfDate	NextPerfDate	IncludeWeekEnds	IncludeHolidays	ExactInter...
TT034	Daily, Mono 1000, Colour 1000 - ...	T	Time		d	1.00	11 Apr 2017	12 Apr 2017	No	No	Yes
3MS	3 Month Service	T	Time		m	3.00	11 Apr 2017	10 Jul 2017	No	No	Yes
TT040	Monthly, Mono 1000, Colour 1000...	C	Condition	Colour_26	Co...	1 000.00			Yes	No	Yes
1MMS	1 Month Machine Service	T	Time		m	1.00	09 Nov 2018	08 Dec 2018	Yes	No	Yes

Open Windows 25 Nov 2018

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