

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

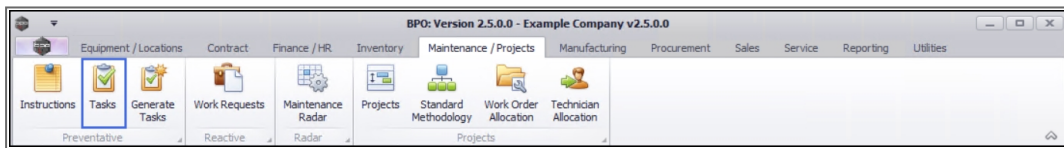
MAINTENANCE

TASKS – ASSIGN / REMOVE AN EXTERNAL LABOUR RESOURCE

Tasks are set up in order to perform scheduled maintenance / service.

You can assign an **External Labour Resource** to a Task. This gives you the ability to see which subcontract services are required for the Task to be completed. Third Party Service Requests will be created when the Task is generated.

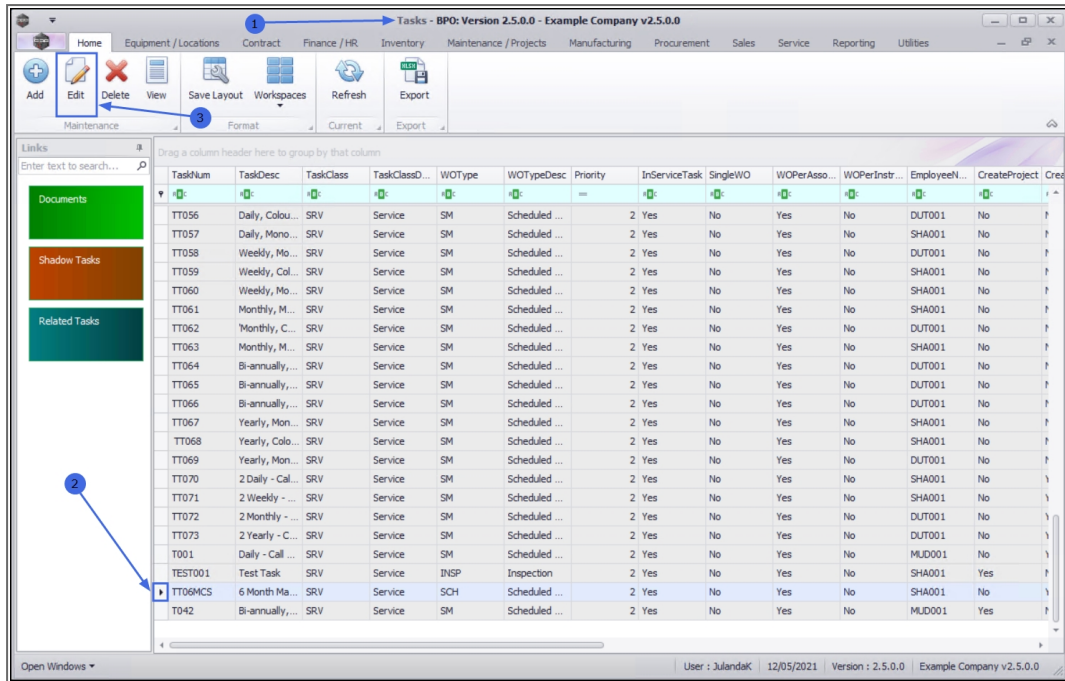
Ribbon Access: Maintenance / Projects > Tasks



1. The **Tasks** list screen will be displayed.
2. Click on the **row** of the task you wish to assign an **External Labour Resource** to.
3. Click on **Edit**.



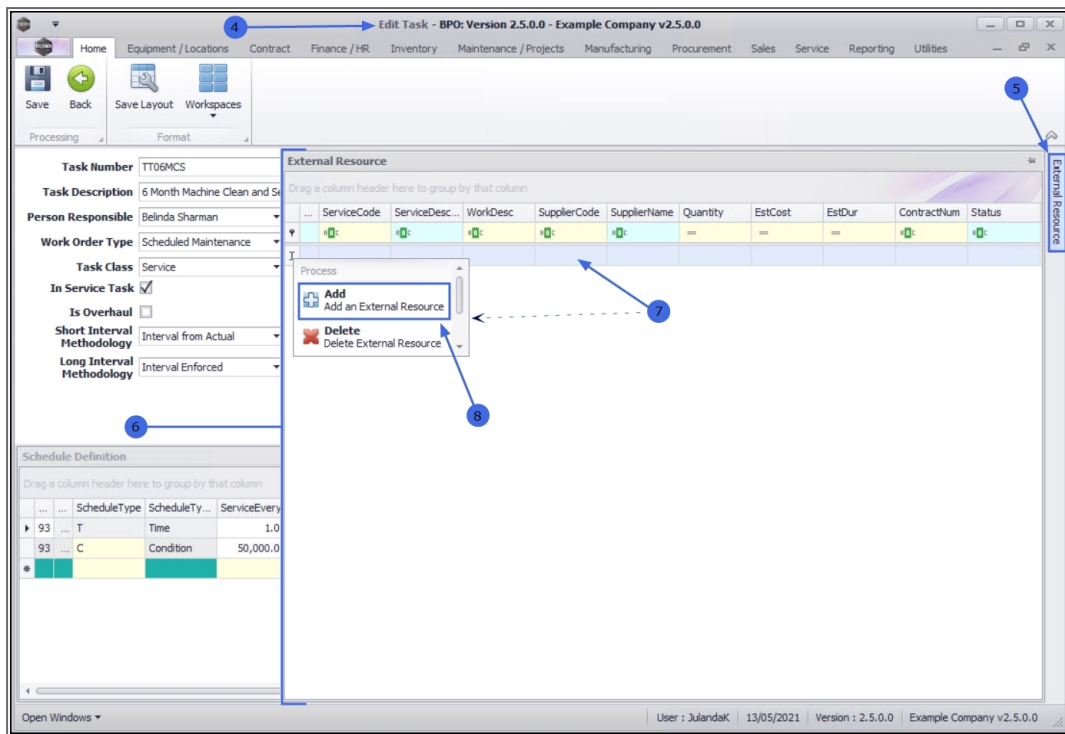
Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



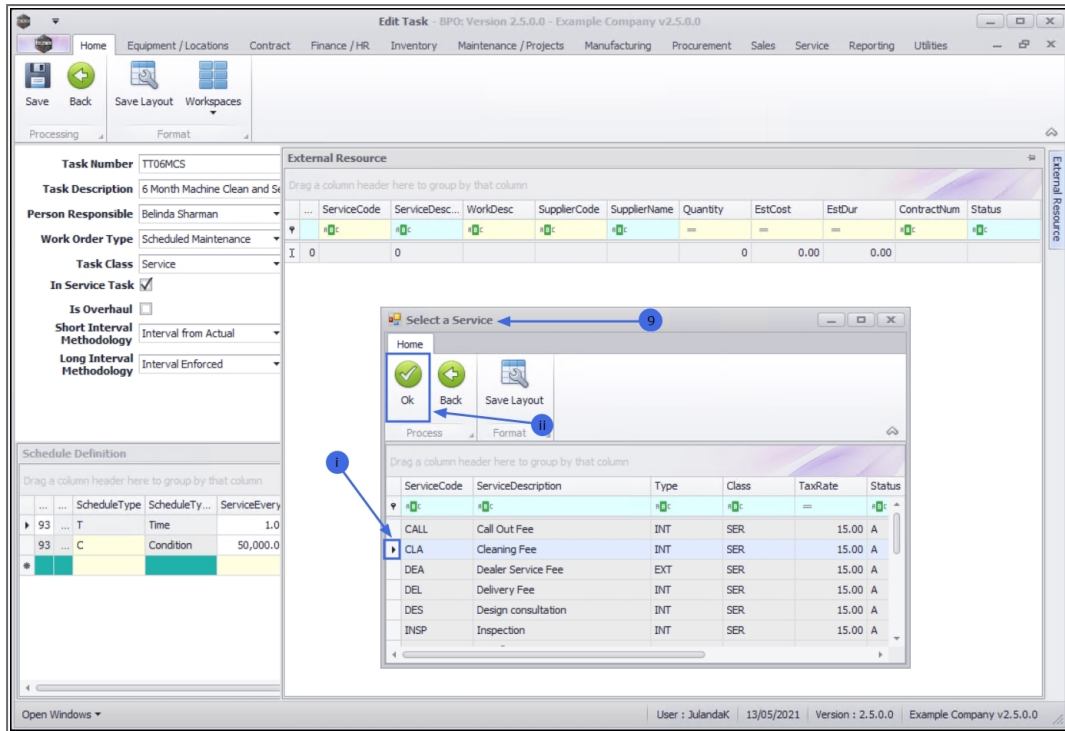
4. The **Edit Task** screen will be displayed.
5. Click on the **External Labour Resource** tab to display the External Resource frame.
6. **Expand** the External Resources Scheduled panel until all the columns can be viewed. This will make it easier to work with.

ADD AN EXTERNAL RESOURCE

7. **Right click** in an available line in the data grid to display the **Process** menu.
8. Click on **Add** - Add an External Resource.



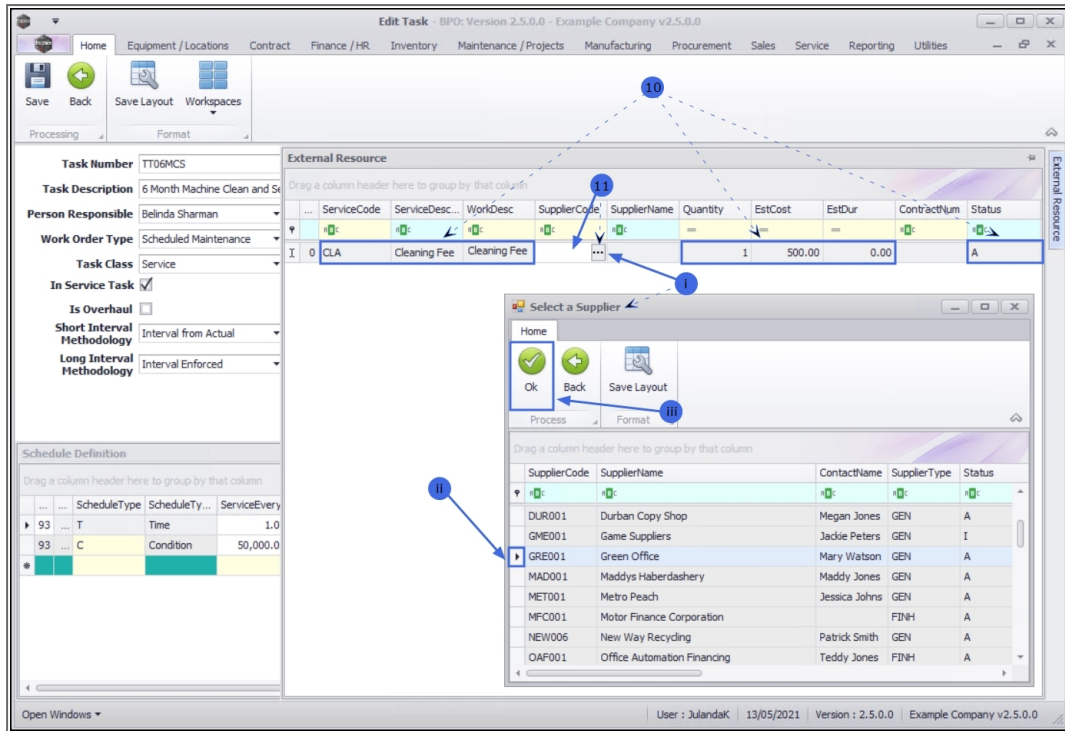
9. The **Select a Service** screen will be displayed.
 - i. Click on the **row** of the **service** you wish to assign to this task.
 - ii. Click on **OK**.



10. The **Service Code, Service Description, Work Description, Quantity, Estimated Cost, Estimated Duration** and **Status** fields will populate with the service you have selected.

SELECT THE SUPPLIER

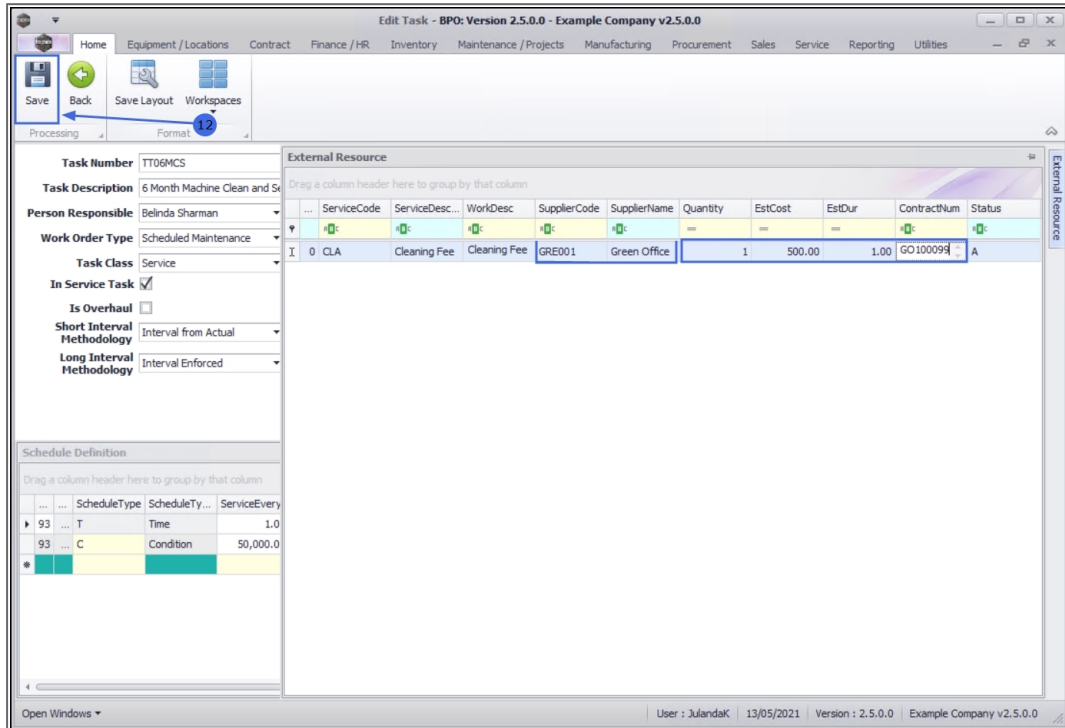
11. Click in the **Supplier Code** field to display an ellipsis button.
 - i. Click on this button to display the **Select a Supplier** screen.
 - ii. Click on the **row** of the **supplier** you wish to outsource the task to.
 - iii. Click on **OK**.



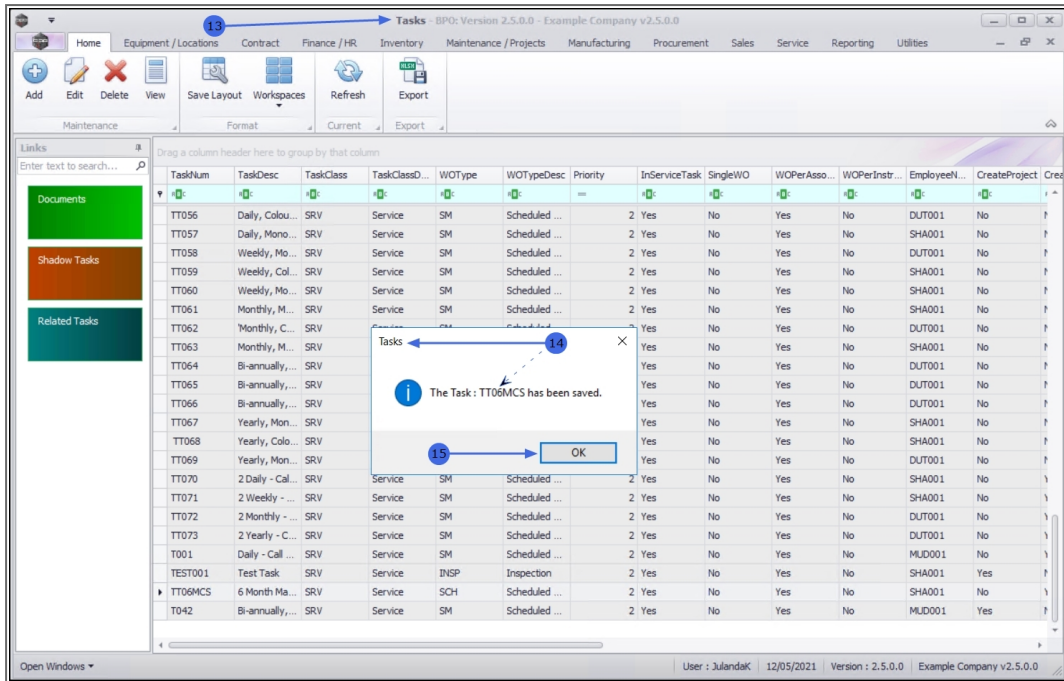
- The **Supplier Code** and **Supplier Name** fields will populate with the supplier information you have selected.
- **Quantity:** This field will be populated. To **change** the quantity, click in the field to **type** in or use the directional **arrows** to specify the number of external resources, if required.
- **Estimated Costs:** This field will be populated. To **change** the estimated cost, click in the field to **type** in, or use the directional **arrows** to specify the estimated cost, if required.
- **Estimated Duration:** Click in the field to **type** in, or use the directional **arrows** to select the estimated duration (in hours) for this external labour resource.
- **Contract Number:** Click in the field to type in the service contract number, if applicable.

SAVE ASSIGNED LABOUR RESOURCE

- When you have finished adding the details to the External Resources frame, click on **Save**.

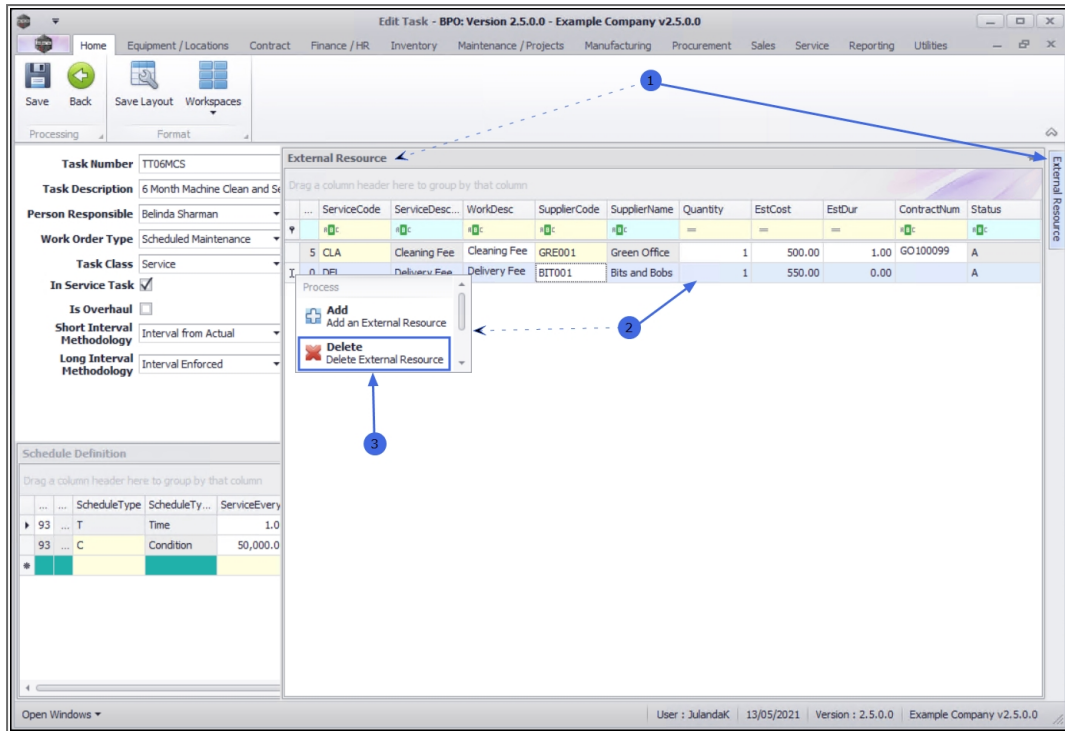


- You will return to the **Tasks** list screen.
- When you receive the **Tasks** message to confirm that;
 - The Task: [task number] has been saved.**
- Click on **OK**.

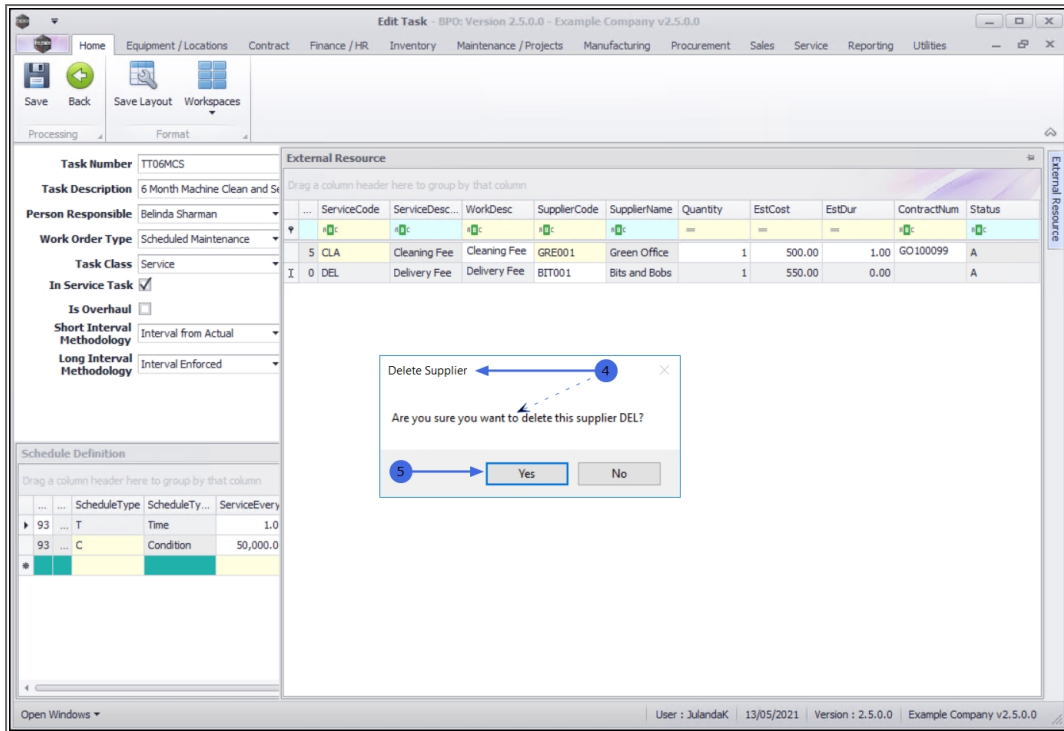


REMOVE AN EXTERNAL LABOUR RESOURCE

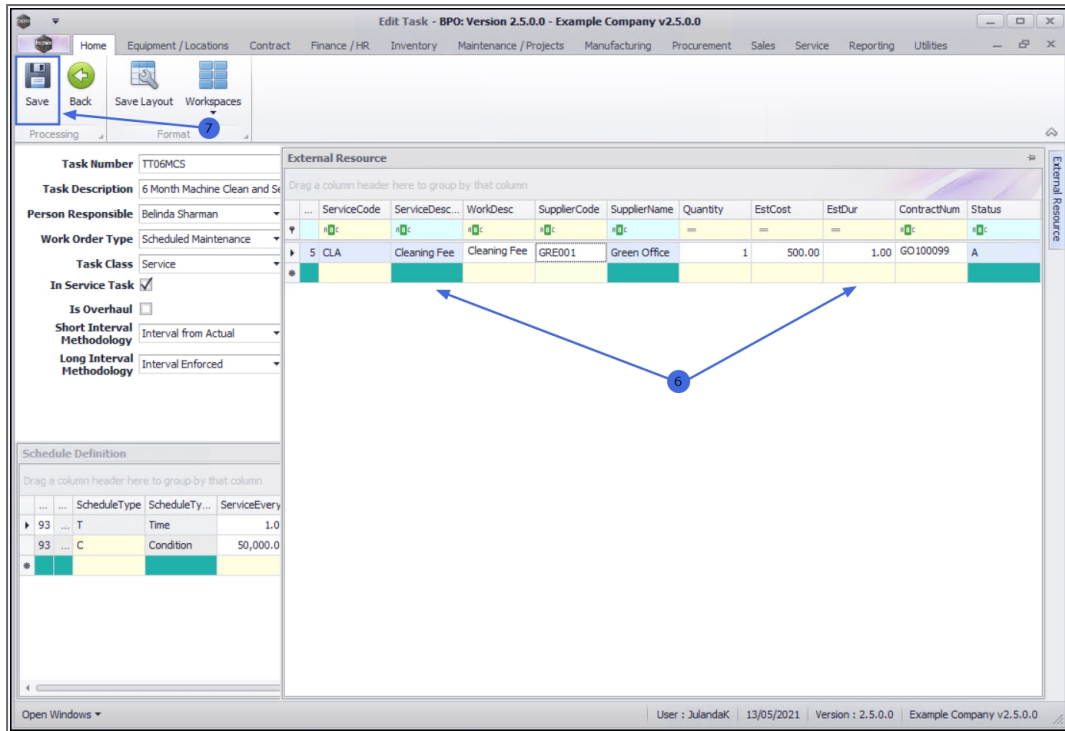
1. In the **External Resource** frame,
2. **Right click** in the **row** of the supplier you wish to remove from the Task, to display the **Process** Menu.
3. Select **Delete** - Delete External Resource.



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



6. The external resource has been removed from the External Resource grid.
7. Click on **Save** to save all the changes.



8. You will return to the **Tasks** list screen.
9. When you receive the **Tasks** message to confirm that;
 - **The Task: [task number] has been saved.**
10. Click on **OK**.

The screenshot displays the 'Tasks' window in the CO3 software. The window title is 'Tasks BPD: Version 2.5.0.0 - Example Company v2.5.0.0'. The interface includes a ribbon with tabs for Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A 'Tasks' tab is selected, showing a list of tasks with columns for TaskNum, TaskDesc, TaskClass, TaskClassD..., WOType, WOTypeDesc, Priority, InServiceTask, SingleWO, WOPerAsso..., WOPerInstr..., EmployeeH..., and CreateProject. A dialog box titled 'Tasks' is open, displaying a message: 'The Task : TT06MCS has been saved.' with an 'OK' button. A blue arrow labeled '8' points to the 'Tasks' tab, and another blue arrow labeled '9' points to the dialog box. A third blue arrow labeled '10' points to the 'OK' button. The status bar at the bottom shows 'User : JulandaK | 12/05/2021 | Version : 2.5.0.0 | Example Company v2.5.0.0'.

TaskNum	TaskDesc	TaskClass	TaskClassD...	WOType	WOTypeDesc	Priority	InServiceTask	SingleWO	WOPerAsso...	WOPerInstr...	EmployeeH...	CreateProject	Cre...
TT056	Daily, Colou...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT057	Daily, Mono...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT058	Weekly, Mo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT059	Weekly, Col...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT060	Weekly, Mo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT061	Monthly, M...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT062	Monthly, C...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT063	Monthly, M...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT064	Bi-annuall...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT065	Bi-annuall...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT066	Bi-annuall...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT067	Yearly, Mon...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT068	Yearly, Colo...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT069	Yearly, Mon...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT070	2 Daily - Cal...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT071	2 Weekly - ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
TT072	2 Monthly - ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT073	2 Yearly - C...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
T001	Daily - Call ...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	MUD001	No	?
TEST001	Test Task	SRV	Service	INSP	Inspection	2	Yes	No	Yes	No	SHA001	Yes	?
TT06MCS	6 Month Ma...	SRV	Service	SCH	Scheduled ...	2	Yes	No	Yes	No	SHA001	No	?
T042	Bi-annuall...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	MUD001	Yes	?

MNU.044.007

