

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

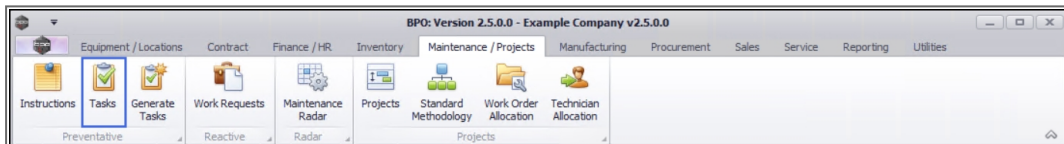
MAINTENANCE

TASKS - LINK AN INSTRUCTION TO A TASK

It is important to note that least **one** Instruction must be linked to a Task.

Instructions are 'Work Instructions' to the person performing the required work.

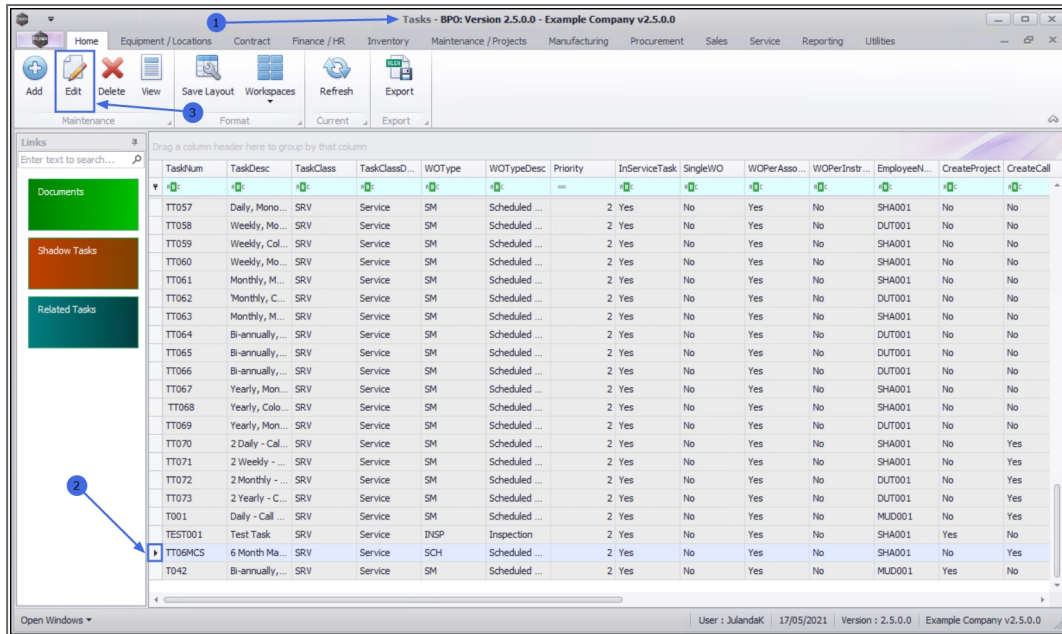
Ribbon Access: Maintenance / Projects > Tasks



1. The **Tasks** list screen will be displayed.
2. Click on the **row** of the task you wish to link an **instruction** to.
3. Click on **Edit**.



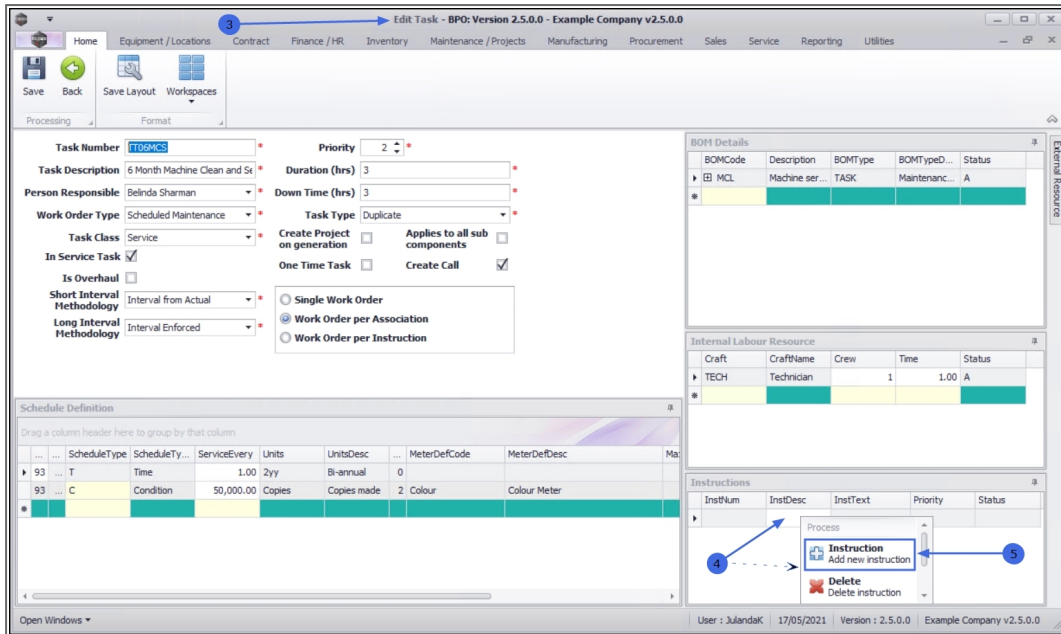
Short cut key: Right click to display the **Process** menu list. Click on **Edit**.



4. The **Edit Task** screen will be displayed.

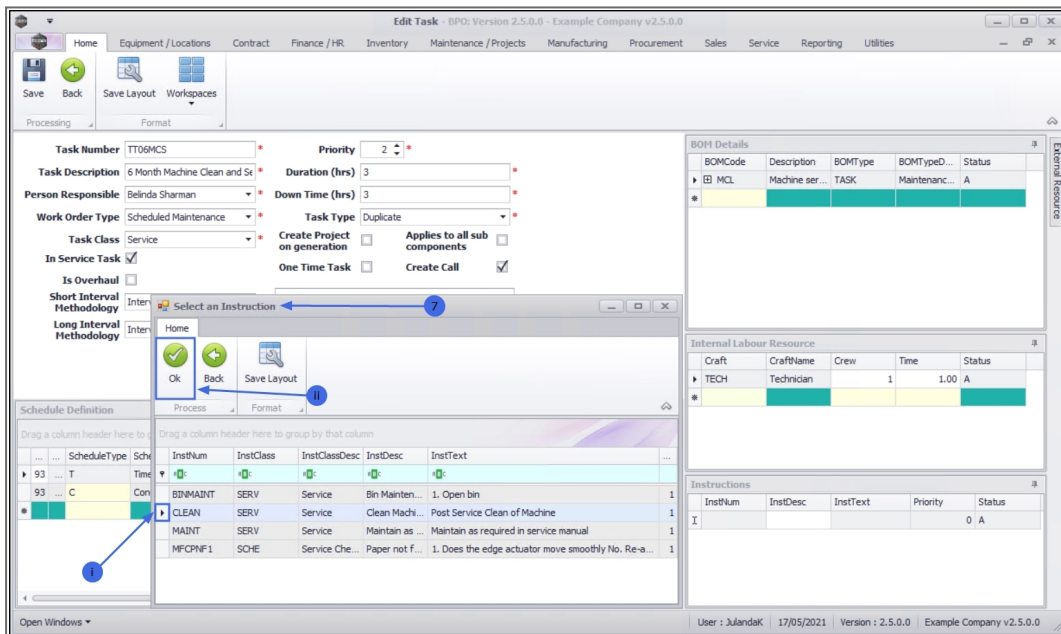
LINK AN INSTRUCTION

5. In the **Instructions** panel, **right click** on a **row** in the data grid to display the **Process** drop-down menu.
6. Click on **Instruction** - Add new instruction.



7. The **Select an Instruction** screen will display.

- i. Click on the **row** of the **instruction** you wish to **link** to this task.
- ii. Click on **OK**.

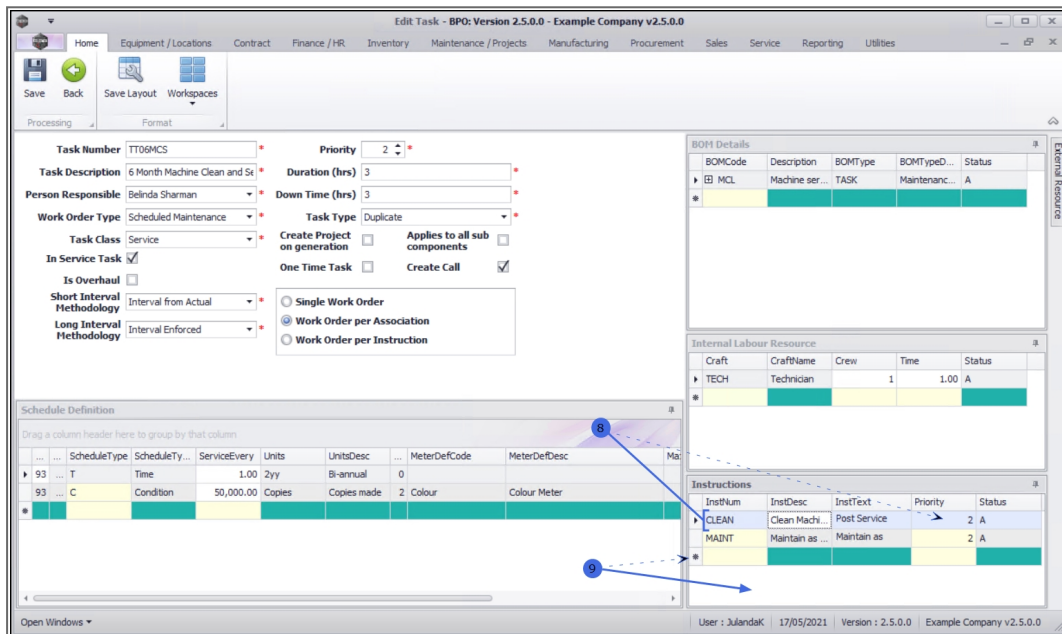


Instructions Details

8. The **Instruction Number**, **Instruction Description**, **Instruction Text**, **Priority** and **Status** text fields will populate with the instruction information selected.

- **Priority:** Click in the text box to type in an alternative **priority**¹ level for the instruction, if required.

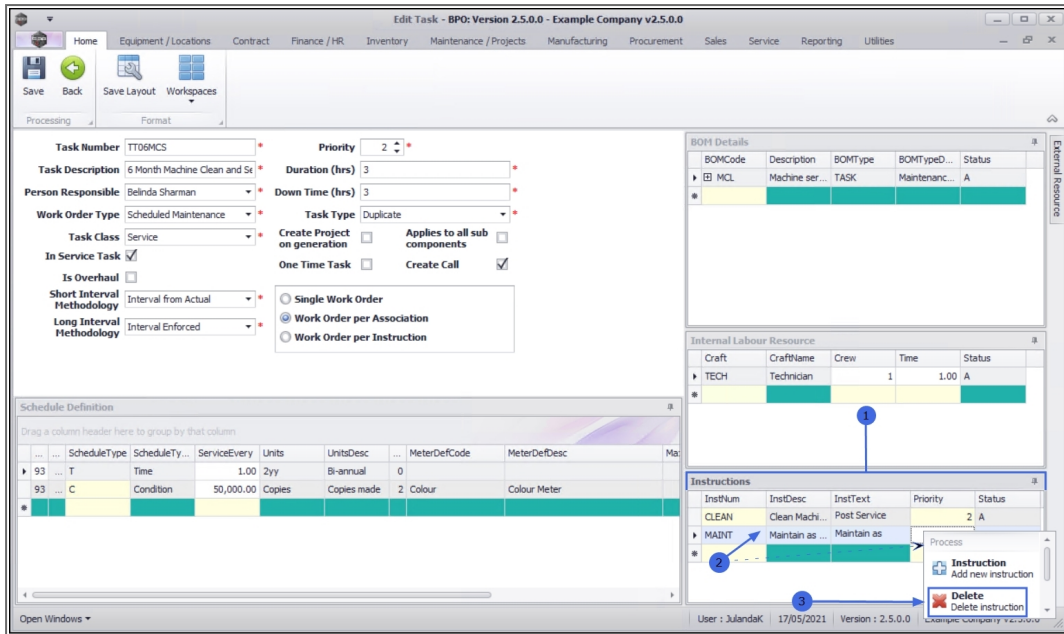
9. Continue adding instructions to this task, as required.



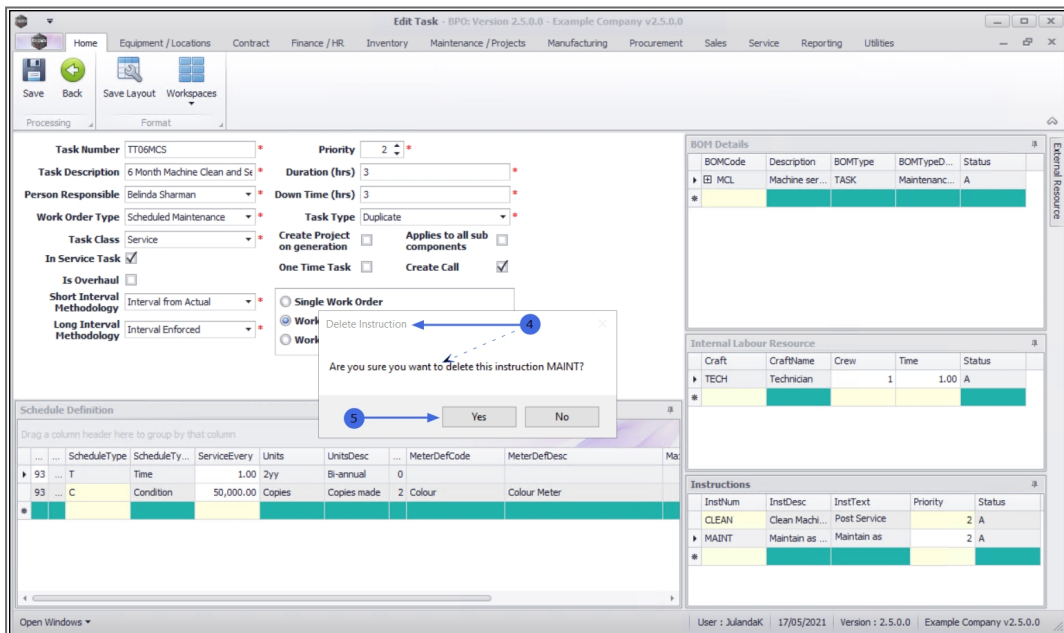
REMOVE AN INSTRUCTION

1. From the **Instructions** frame,
2. **Right Click** in the row of the **Instruction** you wish to remove from the Task, to display the **Process** Menu.
3. Click on **Delete** - Delete instruction.

¹1 = most important and 5 = least important

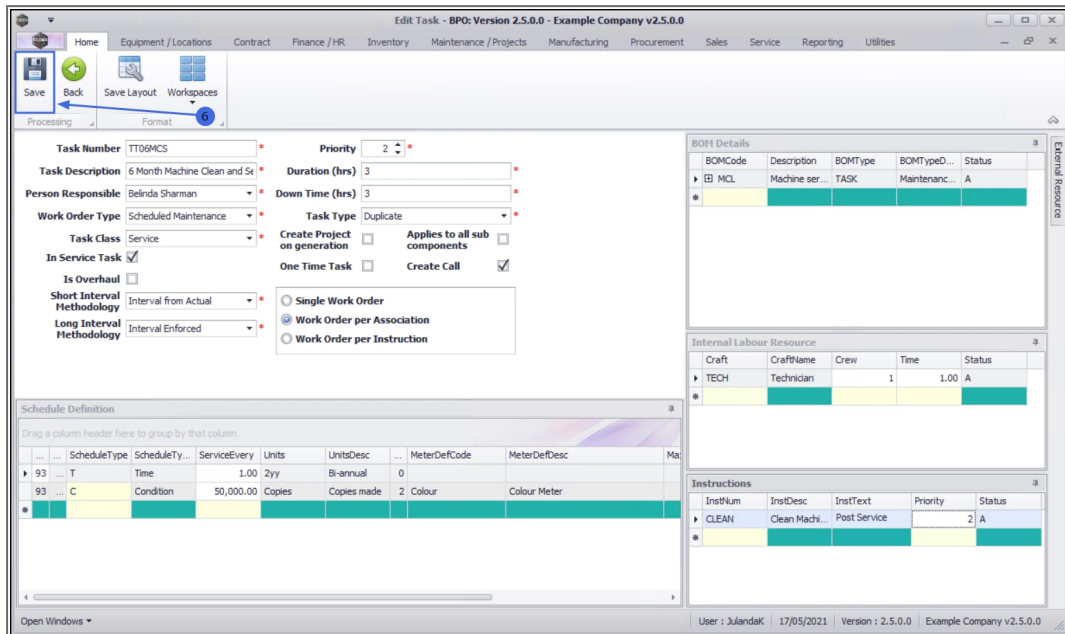


4. When you receive the **Delete Instruction** message to confirm;
 - Are you sure you want to delete this instruction [instruction number]?
5. Click on **Yes** if you are certain about your selection, or
 - Click on **No** to ignore the request and to leave the Instruction linked to the Task.



SAVE THE LINKED INSTRUCTIONS

6. When you have finished linking the instruction details, click on **Save**.



7. You will return to the **Tasks** list screen.

8. When you receive the **Tasks** message to confirm that;

- **The Task: [task number] has been saved.**

9. Click on **OK**.

The screenshot displays the 'Tasks' module in the CO3 software. The main window shows a table of tasks with columns for TaskNum, TaskDesc, TaskClass, TaskClassD..., WOType, WOTypeDesc, Priority, InServiceTask, SingleWO, WOPerAsso..., WOPerInstr..., EmployeeN..., CreateProject, and CreateCall. A dialog box titled 'Tasks' is open, displaying the message 'The Task : TT05MCS has been saved.' with an 'OK' button. A red circle '8' is placed on the dialog box, and a red circle '9' is placed on the 'OK' button. A red circle '7' is placed on the 'Tasks' menu item in the top navigation bar.

| TaskNum | TaskDesc | TaskClass | TaskClassD... | WOType | WOTypeDesc | Priority | InServiceTask | SingleWO | WOPerAsso... | WOPerInstr... | EmployeeN... | CreateProject | CreateCall |
|---------|------------------|-----------|---------------|--------|---------------|----------|---------------|----------|--------------|---------------|--------------|---------------|------------|
| TT055 | Daily, Mono... | SRV | Service | SM | Scheduled ... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT056 | Daily, Colou... | SRV | Service | SM | Scheduled ... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT057 | Daily, Mono... | SRV | Service | SM | Scheduled ... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT058 | Weekly, Mo... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT059 | Weekly, Cal... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT060 | Weekly, Mo... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT061 | Monthly, M... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT062 | Monthly, C... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT063 | Monthly, M... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT064 | Bi-annually... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT065 | Bi-annually... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT066 | Bi-annually... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT067 | Yearly, Mon... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT068 | Yearly, Colo... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | No |
| TT069 | Yearly, Mon... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | No |
| TT070 | 2 Daily - Cal... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | Yes |
| TT071 | 2 Weekly - ... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | Yes |
| TT072 | 2 Monthly - ... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | Yes |
| TT073 | 2 Yearly - C... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | DUT001 | No | Yes |
| T001 | Daily - Call ... | SRV | Service | SM | Scheduled... | 2 | Yes | No | Yes | No | MUD001 | No | Yes |
| TEST001 | Test.Task | SRV | Service | INSP | Inspection | 2 | Yes | No | Yes | No | SHA001 | Yes | No |
| TT06MCS | 6 Month Ma... | SRV | Service | SCH | Scheduled... | 2 | Yes | No | Yes | No | SHA001 | No | Yes |

MNU.044.011

