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.

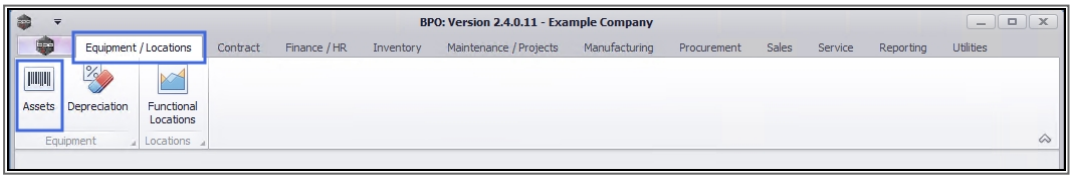
Also remember to check that the task has been set up correctly.

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

Ribbon Access: Equipment and Locations > Assets



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

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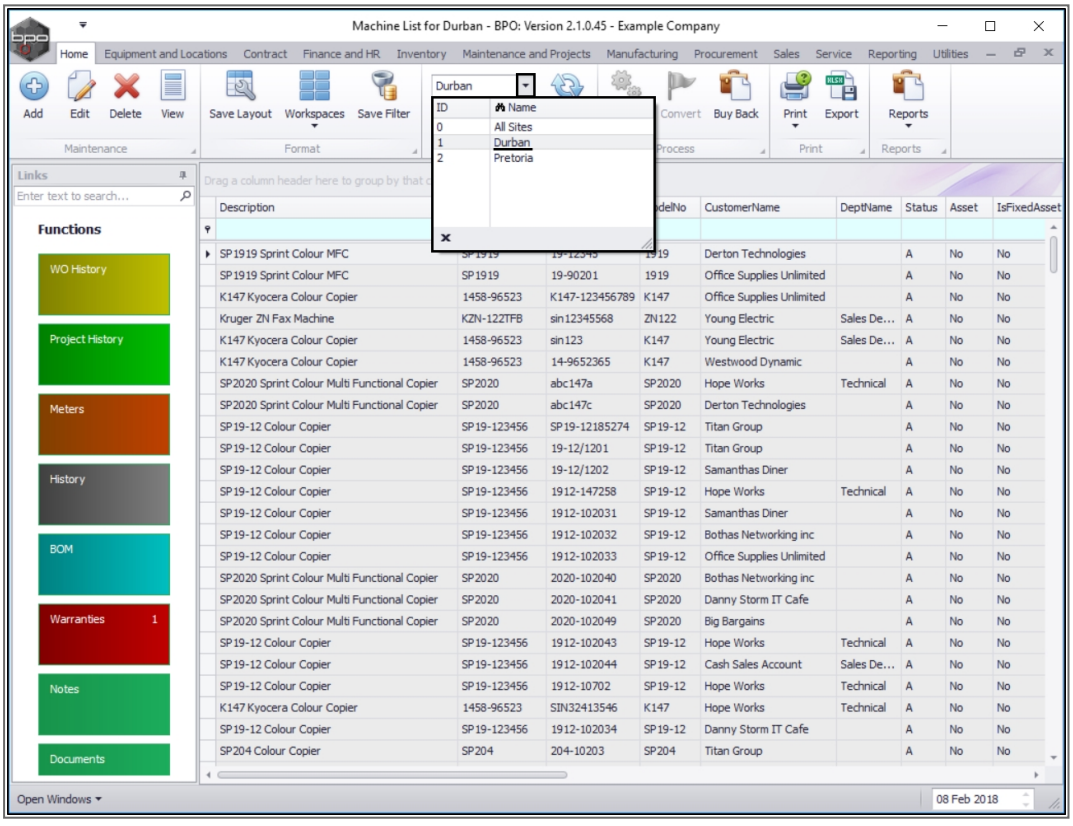
THE SITE AND TYPE FILTERS

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.



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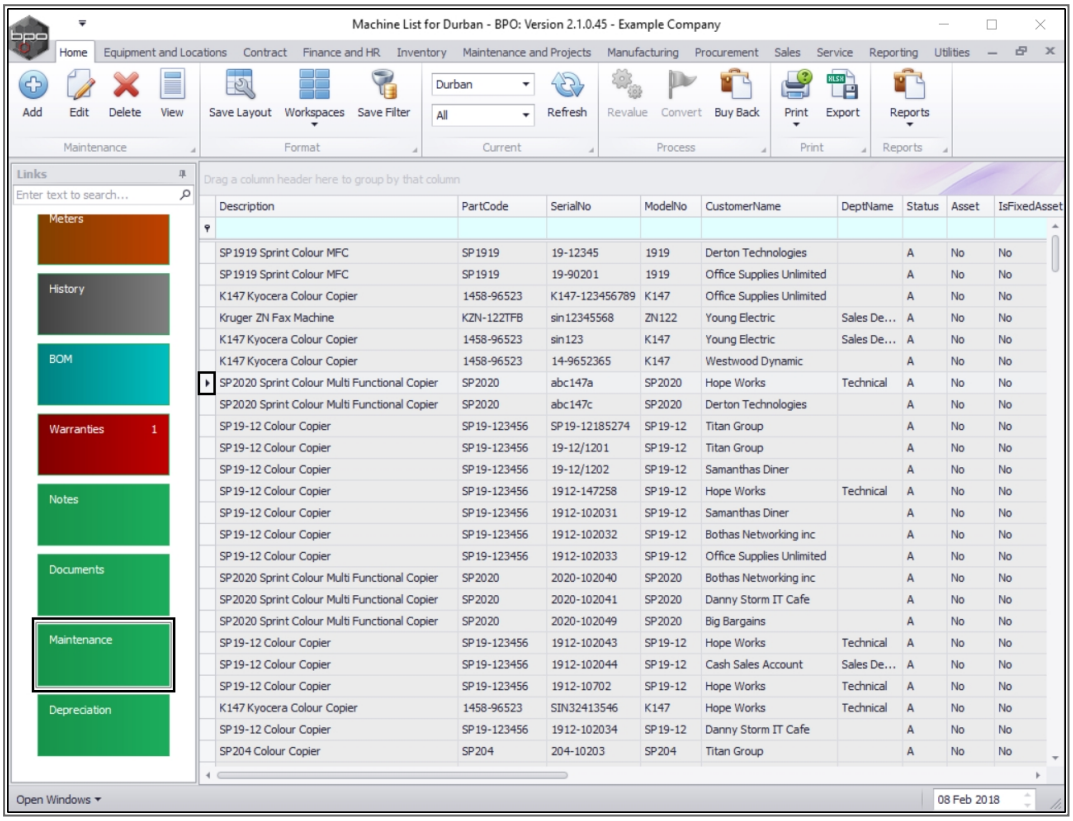
SELECT ASSET

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



ADD NEW TASK

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

- Click on **Add**.

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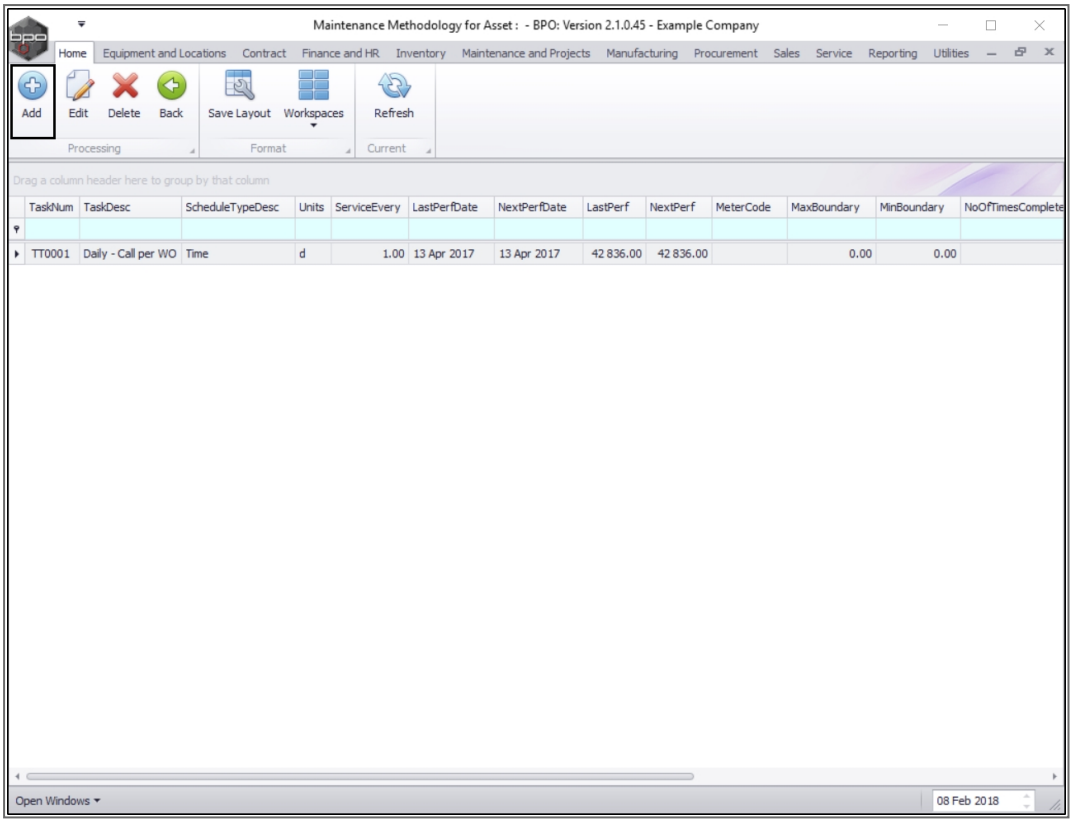

The **Add new task schedule** screen will be displayed.

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

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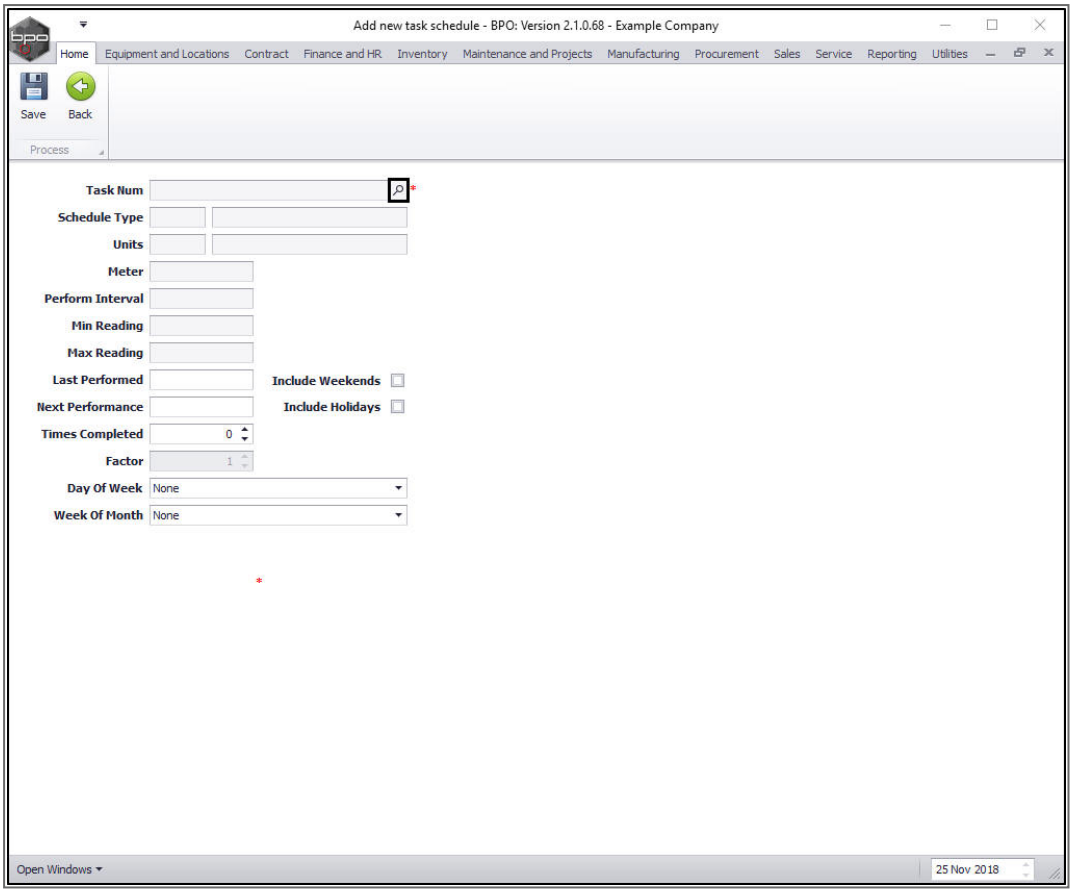

TASK SCHEDULE OPTIONS

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**.

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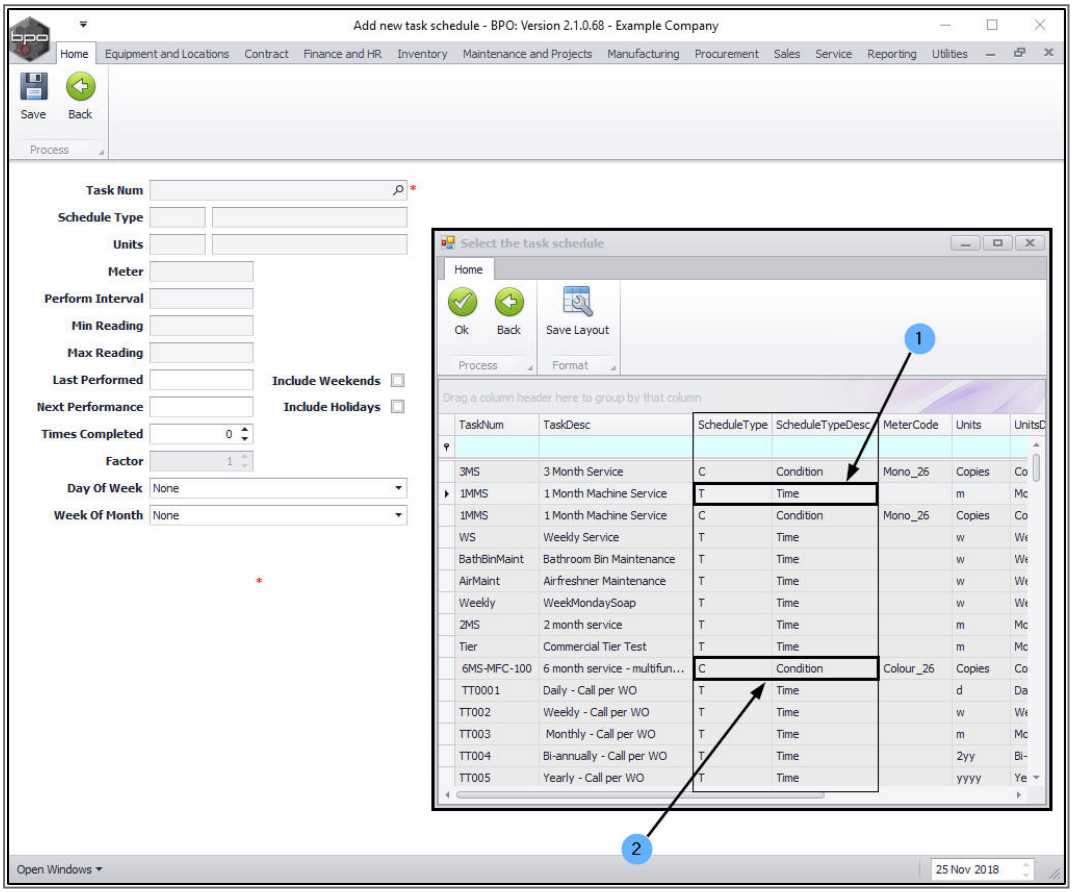
Condition Based Schedule

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**.

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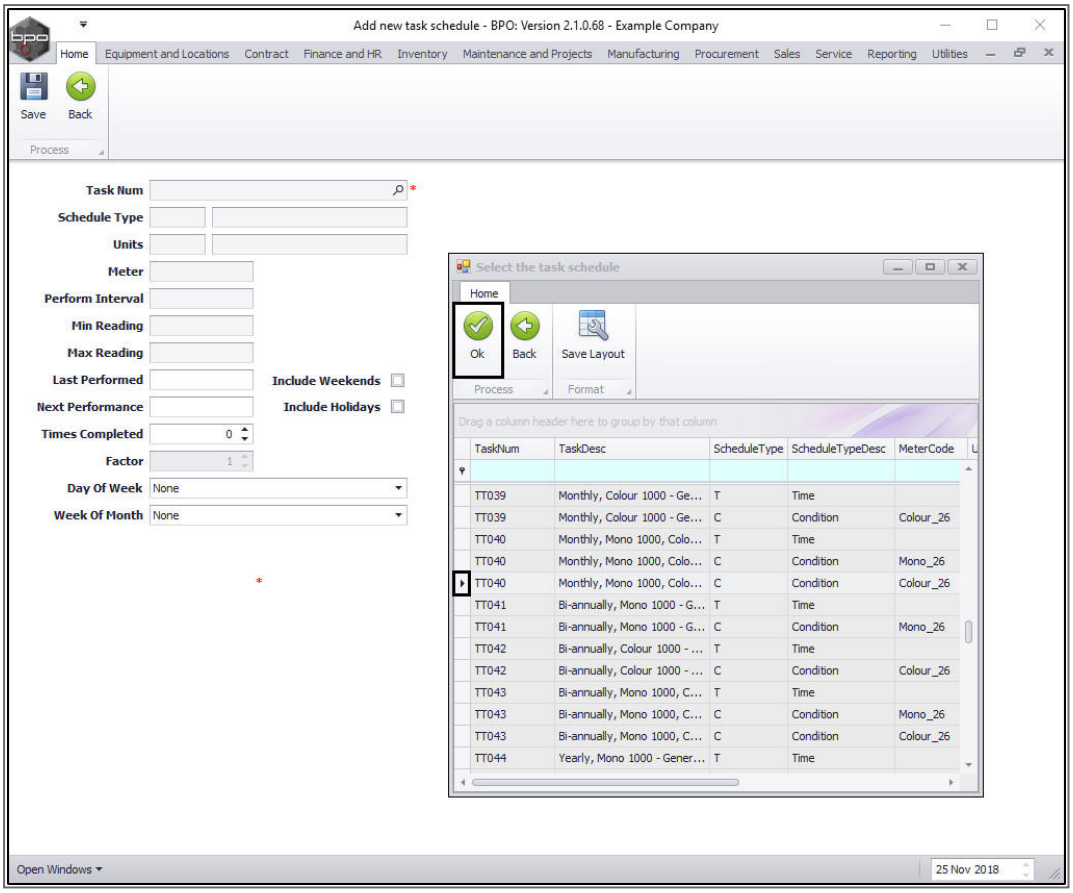

ADD TASK DETAILS

- **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

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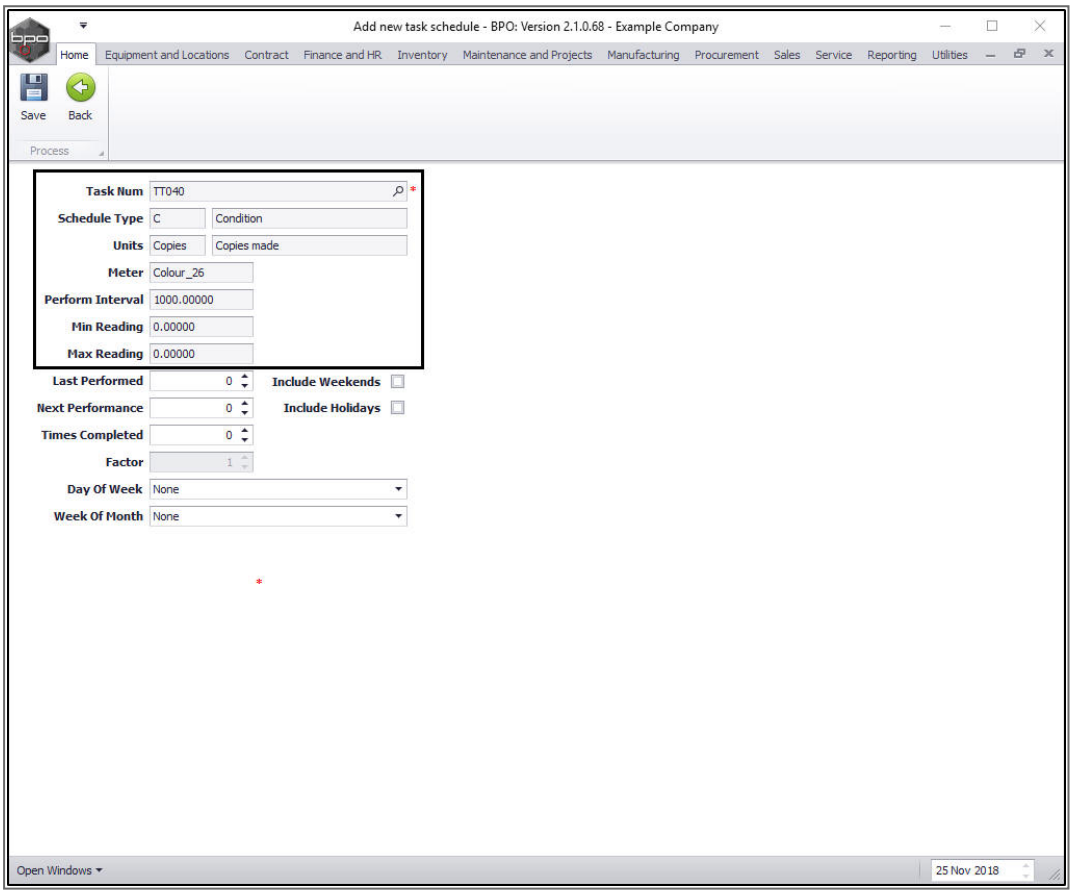
condition-based schedule this will auto populate with the number of copies that will be made before the performance schedule will be triggered).

- **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.

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- **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

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

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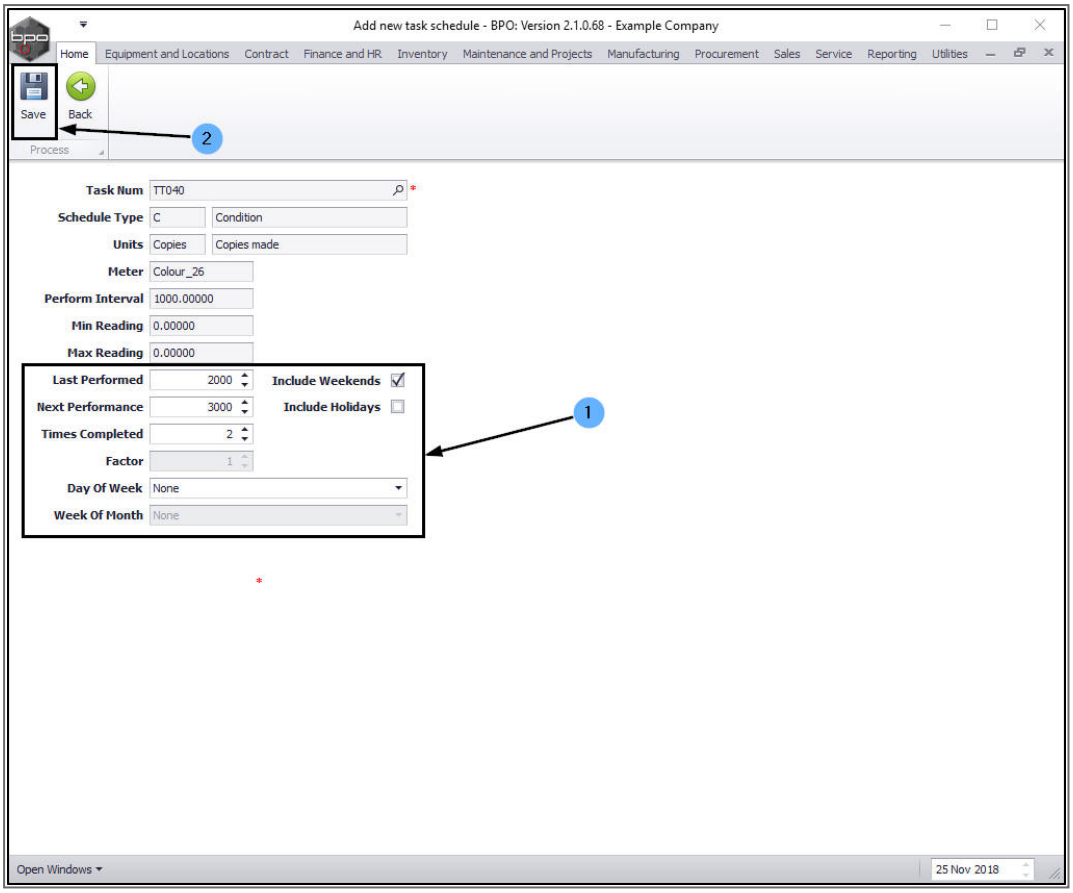

You will return to the **Maintenance Methodology for Asset:** screen.

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**.

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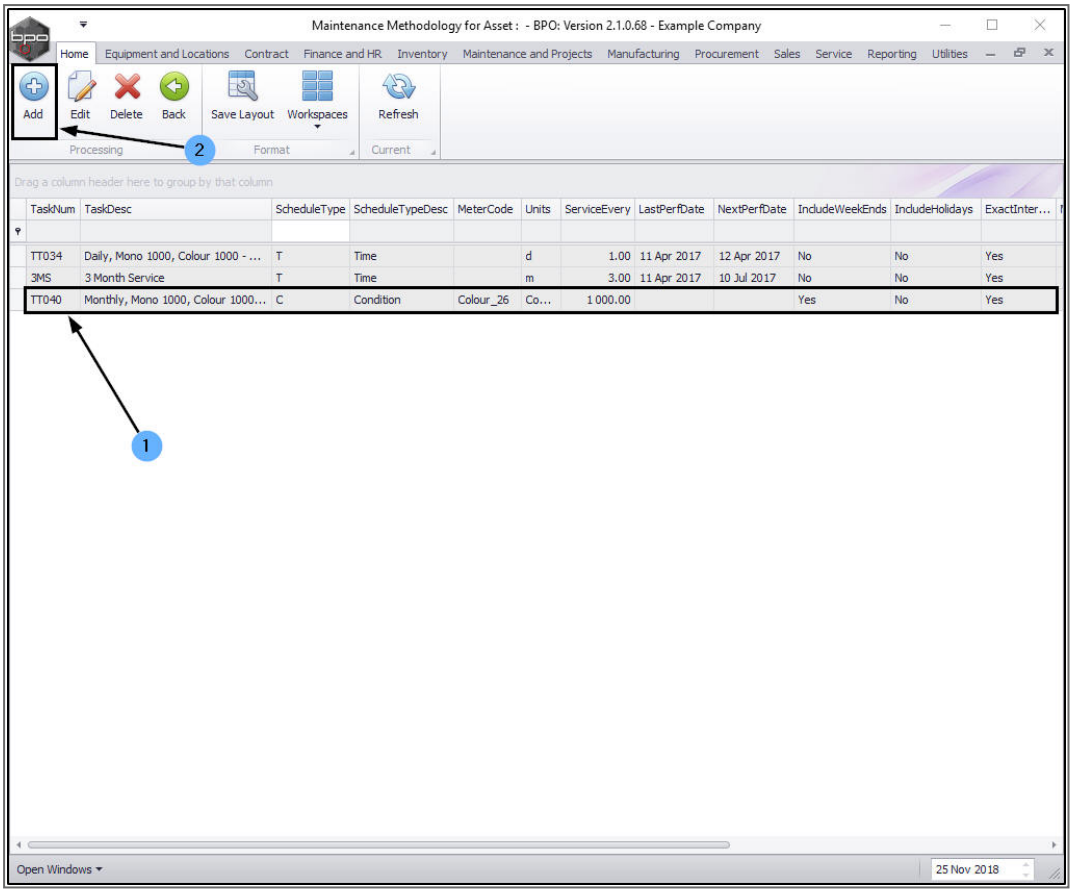

The **Add new task schedule** screen will be displayed.

SELECT TASK SCHEDULE

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

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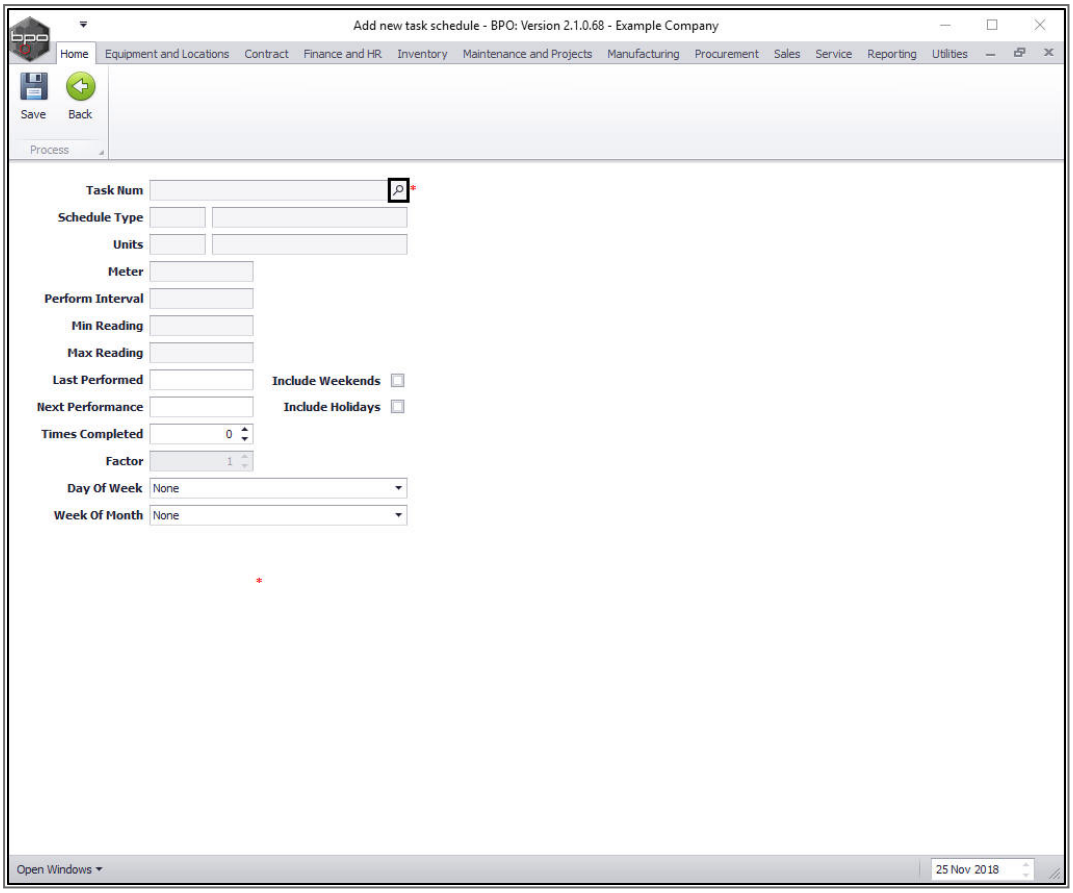

The **Select the task schedule** pop up screen will appear.

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

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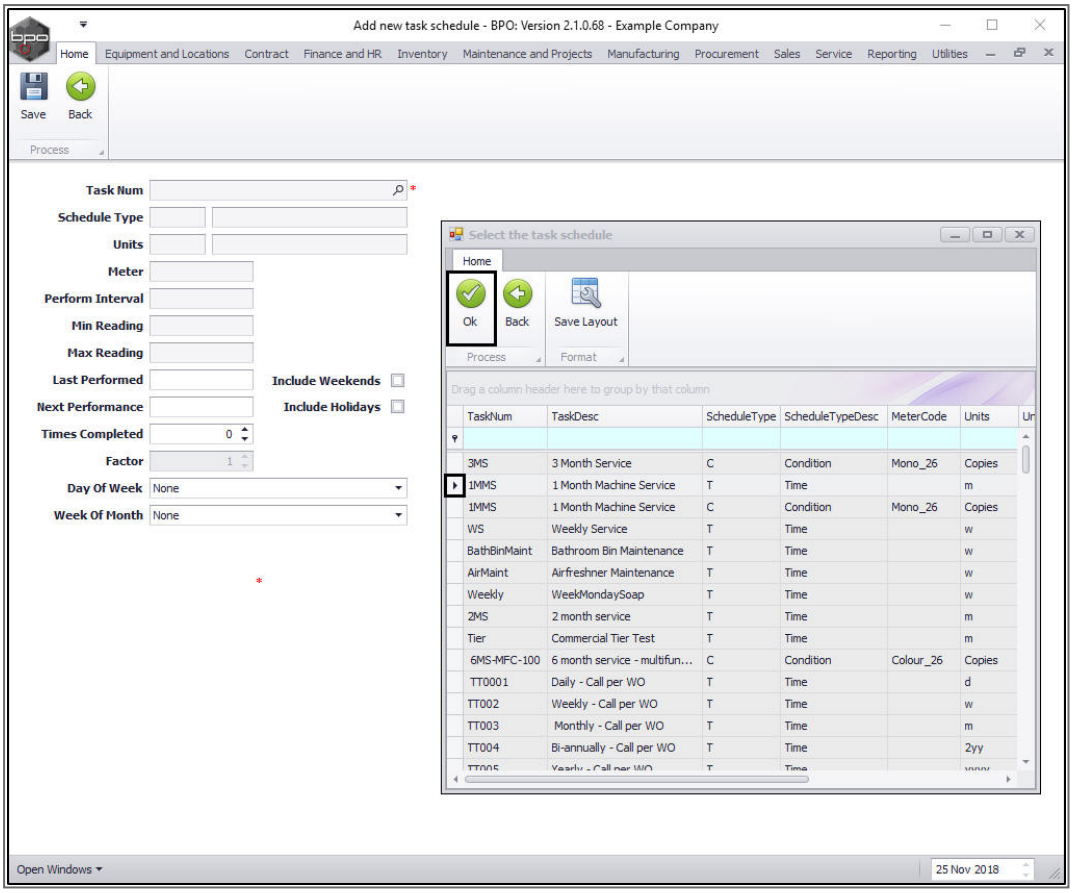

ADD TASK DETAILS

- **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.

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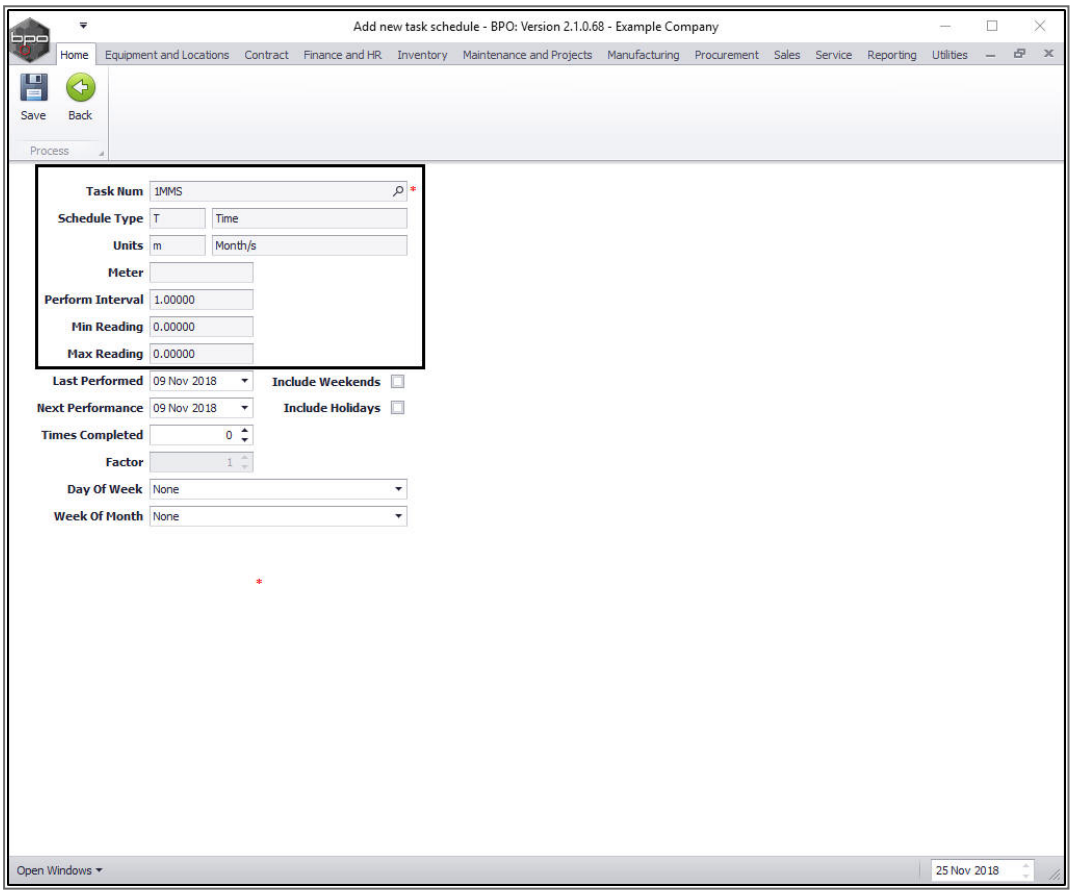
- **Perform Interval:** This will populate depending on the schedule type e.g. **6** (for **6** months) in this example a **1**-month machine service has been selected, so the field has populated with **1** (for **1** month).
- **Min Reading:** This will auto populate with **0** as this 'time' task schedule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



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.

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- **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

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

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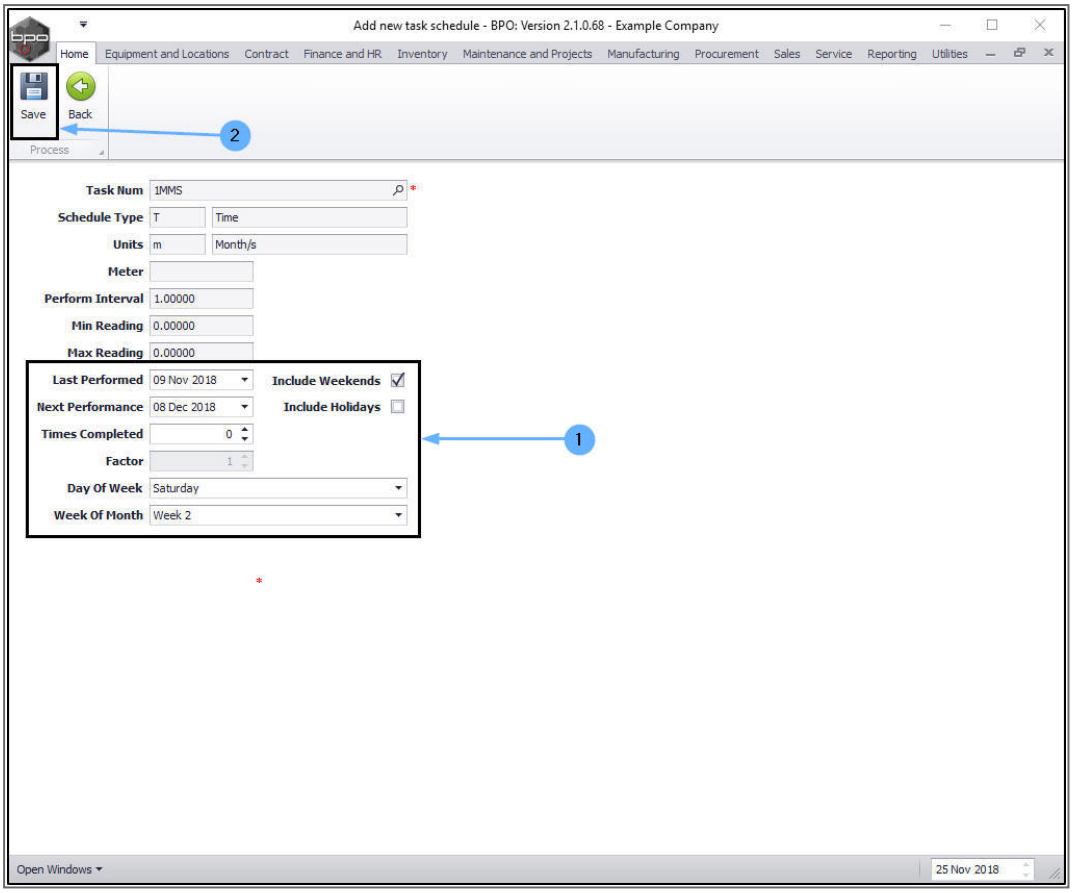

VIEW TASK SCHEDULE

- 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.

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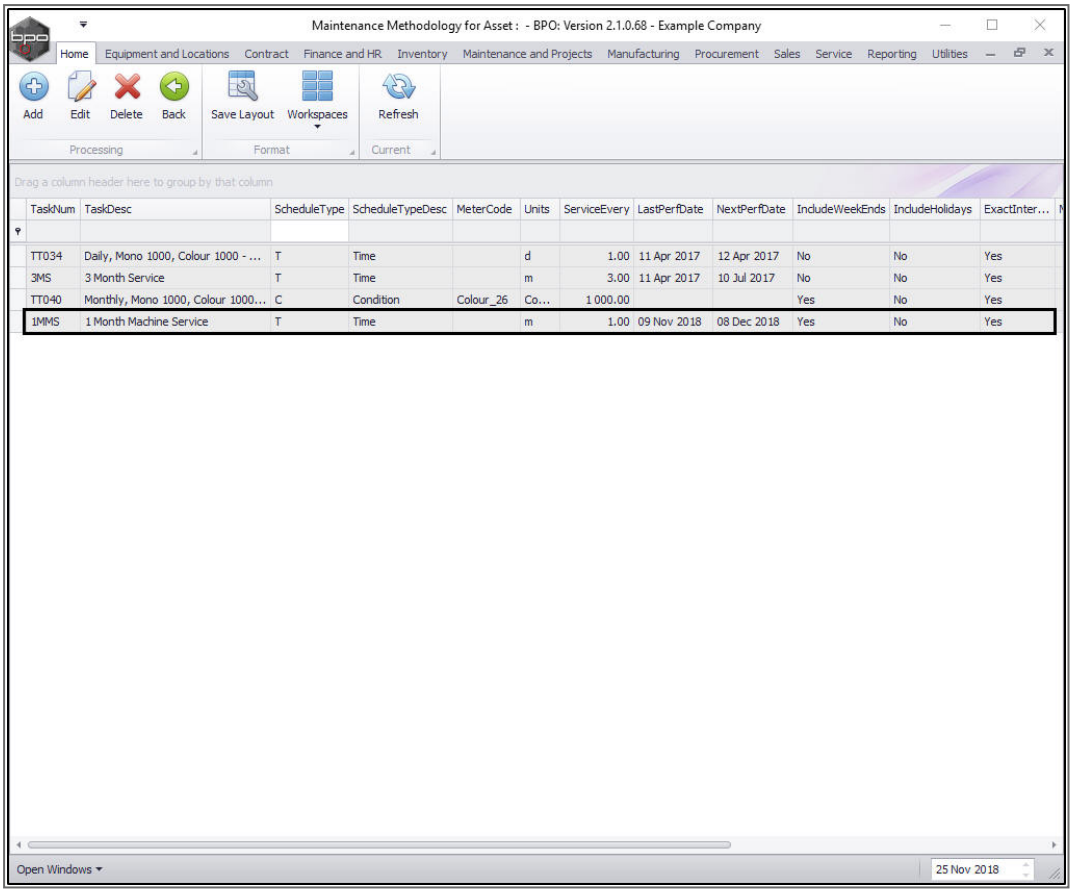

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