

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

## MAINTENANCE

## **TASKS - GENERATION METHODOLOGY**

(Task Interval/Schedule Definition)

Ribbon Access: Maintenance / Projects > Tasks

<b>*</b>						BPO: Version	2.5.0.0 - Exa	mple Company v2	.5.0.0					- <b>- x</b>
	Equipmen	nt / Locations	Contract	Finance / HR	Inventory	Maintenan	ce / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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Instructio	ns Tasks	Generate Tasks	Work Requests	Maintenance Radar	Projects	Standard Methodology	Work Order Allocation	Technician Allocation						
1	reventative	4	Reactive	Radar _		Proj	ects	4						$\diamond$

- 1. The **Tasks** listing screen will be displayed.
- 2. Click on the **row** of the task you wish to create a schedule definition for.
- 3. Click on **Edit**.

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



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				TT058	Weekly, Mo		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	
				TT059	Weekly, Col		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	
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				TT061	Monthly, M		Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	
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				TT066	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	
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				TT069	Yearly, Mon	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	
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				TT071	2 Weekly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	
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				TT073	2 Yearly - C	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	
				T001	Daily - Call	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	
				TEST001	Test Task	SRV	Service	INSP	Inspection	2	Yes	No	Yes	No	SHA001	
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4. The **Edit Task** screen will be displayed.

## **ADD SCHEDULE DEFINITION**

- 5. **Expand** the Schedule Definition panel until all the columns can be viewed. This will make it easier to work with.
- 6. Right click anywhere in the new row to display the Process menu list.
- 7. Click on Schedule Definition Add new Schedule Definition.



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Task Description 6 Month Machine Clean and Se *	Duration (hrs) 3 *	*
Person Responsible Belinda Sharman 🔹 *	Down Time (hrs) 3	BOM Details 4 BOMCode Desi *
Work Order Type Scheduled Maintenance 🔹	Task Type Dupicate	Ce
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Open Windows 🔻	User : JulandaK 11/05/2021 Version : 2.5.0.0 Exa	mple Company v2.5.0.0

#### TIME BASED SCHEDULE

- 8. The **Select a Schedule Type** screen will be displayed.
  - i. There are **two** interval types available;
    - Time Based Schedule<sup>1</sup>
    - Condition Based Schedule<sup>2</sup>
  - ii. Click on the **row** of the **Time Based Schedule** type as this is the definition being created for the task.
  - iii. Click on OK.

<sup>&</sup>lt;sup>1</sup>The Time Based Schedule refers to days, weeks, months and years

<sup>&</sup>lt;sup>2</sup>The Condition Based Schedule refers to a meter definition based schedule, e.g. copies made



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Home Equipment / Locations Contract	t Finance / HR Inventory Maintenance	e / Projects Manufacturing Procurement Sales Service Reporting	Utilities — 🗗 🗙
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Task Class Service **	Create Project Applies to all s	ub 🔲	
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Open Windows 👻		User : JulandaK 11/05/2021 Version : 2.5.0.0	Example Company v2.5.0.0

- Schedule Type: This field is populated with the schedule type code you have selected.
- Schedule Type Desc: This field is populated with the schedule type description you have selected.
- Service Every: Click in the text box and type in or use the arrow indicators to select the service performance interval<sup>1</sup>.

#### **Add the Units**

- 9. Click in the **Units** text box to display the **ellipsis** button.
  - i. Click on this button to display the **Select a Unit** screen.
  - ii. Click on the **row** of the unit code that you wish to link to this schedule definition.
  - iii. Click on OK.

 $^1 \rm This$  interval depends on the schedule type, e.g. 6 for 6 months for a Time Schedule Type or 5000 for 5000 mono/colour copies for a Condition Schedule Type



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- **Units:** The text box will be populated with the unit code you have selected.
- Unit Desc: The text box will be populated with the unit code description you have selected.

Note: The Meter Definition Code, Meter Definition Desc, Max Boundary and Min Boundary text boxes are not required when setting up the time schedule definition, but will be required when setting up the Condition schedule type definition.

- **Tolerance:** Click in the text box and **type** or use the **arrow** indicators to select the tolerance in which the task can be performed in, without affecting the next due execution point, if applicable.
- Extension Allowed: Click in the text box and type or use the arrow indicators to select the extension allowed for the task to be performed, if applicable.

The **Time schedule definition** has now been completed for this task.



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#### **CONDITION SCHEDULE DEFINITION**

- 1. Click anywhere in the Schedule Definition grid area to open a **new row**.
- 2. Right click anywhere in the **new row** to display the **Process** menu.
- 3. Click on the **Schedule Definition** Add new Schedule Definition.



	Edit Task - BPO: Version 2.5.0.0	- Example Company v2.5.0.0	- • ×
Home Equipment / Locations Contract	t Finance / HR Inventory Maintenance / Projects	s Manufacturing Procurement Sales Service Reporting Utilities	_ & ×
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Task Class Service  *	Create Project Applies to all sub components		
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- 4. The Select a Schedule Type screen will be displayed.
  - i. There are **two** interval types available;
    - Time Based Schedule<sup>1</sup>
    - Condition Based Schedule<sup>2</sup>
  - ii. Click on the **row** of the **Condition** Based Schedule as this is the definition being created for the task.
  - iii. Click on **OK**.

<sup>&</sup>lt;sup>1</sup>The Time Based Schedule refers to days, weeks, months and years

<sup>&</sup>lt;sup>2</sup>The Condition Based Schedule refers to a meter definition based schedule, e.g. copies made



<b>\$</b> ▼	Edit Task - BPO: Version 2	L5.0.0 - Example Company v2.5.0.0
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Task Description 6 Month Machine Clean and Se *	Duration (hrs) 3	* BOMCode g
Person Responsible Belinda Sharman 👻 *	Down Time (hrs) 3	
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		T Time None
Open Windows 🕶	Capture screenshot.	

- Schedule Type: This field is populated with the schedule type code you have selected.
- Schedule Type Desc: This field is populated with the schedule type description you have selected.
- Service Every: Click in the text box and type or use the arrow indicators to select the service performance interval<sup>1</sup>.

#### Add the Meter Code

- 5. Click in the **Meter Definition Code** text box to display the **ellipsis** button.
- 6. Click on this button to display the **Select a Meter Type Definition** screen.

<sup>1</sup>This interval depends on the schedule type, e.g. 6 for 6 months for a Time Schedule Type or 5000 for 5000 mono/colour copies for a Condition Schedule Type



- i. Click on the **row** of the meter definition that you wish to link to this schedule definition.
- ii. Click on **OK**.

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- **Units:** This text box will be populated with the meter type units you have selected.
- Units Description: This text box will be populated with the meter type description you have selected
- Meter Definition Code: This text box will be populated with the meter type definition you have selected.
- Meter Definition Desc: This text box will be populated with the meter type definition description you have selected.
- **Tolerance:** Click in the text box and **type** or use the **arrow** indicators to select the tolerance in which the task can be performed in, without affecting the next due execution point, if applicable.



• Extension Allowed: Click in the text box and type or use the arrow indicators to select the extension allowed for the task to be performed, if applicable.

### **SAVE DEFINITION DETAILS**

7. When you have finished linking the definition details, click on **Save**.

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	e Layout Worksp	Naces											
Task Number	TT06MCS	•	Priority	2 🛊 *									BOM 4
Task Description	6 Month Machine	Clean and Se *	Duration (hrs)	3		•							BOMCor
rson Responsible	Belinda Sharman	•	Down Time (hrs)	3		•							*
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- 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.



Home	Equipm	ent / Locatio	ns Contract	Finance / HR	Inventory	Maintenar	nce / Projects	Manufacturing	Procuremen	it Sales	Service A	Reporting L	Utilities	- 8	
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		TT056	Daily, Colou		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	No	-
		TT057 TT058	Daily, Mono Weekly, Mo		Service	SM	Scheduled		Yes	No	Yes	No	SHA001 DUT001	No	1
Shadow Tasks		TT059	Weekly, Mo		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	No	ť
		TT060	Weekly, Mo		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	No	Ξ,
		TT061	Monthly, M		Service	SM	Scheduled		Yes	No	Yes	No	SHA001	No	ŧ,
Related Tasks		TT062	'Monthly, C		Candes	CM	Cabadulad	2	Yes	No	Yes	No	DUT001	No	
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		TT064	Bi-annually,				11		Yes	No	Yes	No	DUT001	No	
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		TT067	Yearly, Mon	SRV					Yes	No	Yes	No	SHA001	No	
		TT068	Yearly, Colo	. SRV					Yes	No	Yes	No	SHA001	No	
		TT069	Yearly, Mon	SRV	10	)		OK	Yes	No	Yes	No	DUT001	No	
		TT070	2 Daily - Cal	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
		TT071	2 Weekly	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
		TT072	2 Monthly	. SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	1
		TT073	2 Yearly - C	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	DUT001	No	1
		T001	Daily - Call	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	No	1
		TEST001	Test Task	SRV	Service	INSP	Inspection	2	Yes	No	Yes	No	SHA001	Yes	
		<ul> <li>TT06MC5</li> </ul>			Service	SCH	Scheduled	2	Yes	No	Yes	No	SHA001	No	1
		T042	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	Yes	1
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## **REMOVE A SCHEDULED DEFINITION FROM A TASK**

- 1. From the Edit Task screen,
- 2. Click on the **row** of the schedule definition you wish to remove from the task.
- 3. Right click anywhere in the row to display the Process screen.
- 4. Select **Delete** Delete Schedule Definition.



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Home Equipment / Locations Contract	Finance / HR In	ventory	Maintenance / Projects	Manufacturing	Procurement Sa	les Service	Reporting	Utilities	_ & ×
Save Back Processing Format									6
Task Number TT058	Priority	2 🗘 *							BOM #
Task Description Weekly, Mono 1000 - WO Only *	Duration (hrs) 1		+						BOMCode *
Person Responsible Bianca Du Toit - * Do	wn Time (hrs) 1		+						*
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5. When you receive the **Delete Schedule Definition** message to confirm;

# • Are you sure you want to delete this schedule definition Condition?

- 6. Click on **Yes** if you are certain about your selection or,
  - Click on **No** to ignore the request and to leave the schedule definition linked to the task.
- 7. The schedule definition will be removed from the Task.

## SAVE THE SCHEDULE DEFINITION

8. Click on Save.



<b>⊉</b> =	Edit Task - BPO: Version 2.5.0.0 - Ex	ample Company v2.5.0.0		_ <b>–</b> ×
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Task Number TT058	Priority 2 🔹 *			BOM #
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- 9. You will return to the Tasks list screen.
- 10. When you receive the **Task** message to confirm that;
  - The Task: [task number] has been saved.
- 11. Click on OK.

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		TT057	Daily, Mono	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
Shadow Tasks		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	
Related Tasks		TT061	Monthly, M	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	SHA001	No	
		TT062	'Monthly, C	SRV	Service	C14	Calculated		Yes	No	Yes	No	DUT001	No	
		TT063	Monthly, M	SRV	Se Tasks 🔫		9	×	Yes	No	Yes	No	SHA001	No	
		TT064	Bi-annually,	SRV	Se		11	2	Yes	No	Yes	No	DUT001	No	
		TT065	Bi-annually,	SRV	Se 💼	The Task : TT058 has been s		aved.	Yes	No	Yes	No	DUT001	No	
		TT066	Bi-annually,	SRV	St	The lose .	. Troso has been		Yes	No	Yes	No	DUT001	No	
		TT067	Yearly, Mon	SRV	Se			2	Yes	No	Yes	No	SHA001	No	
		TT068	Yearly, Colo	SRV	Se			2	Yes	No	Yes	No	SHA001	No	
		TT069	Yearly, Mon	SRV	Se			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		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	No	
		TT073	2 Yearly - C		Service	SM	Scheduled		Yes	No	Yes	No	DUT001	No	
		T001	Daily - Call		Service	SM	Scheduled		Yes	No	Yes	No	MUD001	No	
		TEST001	Test Task	SRV	Service	INSP	Inspection		Yes	No	Yes	No	SHA001	Yes	
		TT06MCS	6 Month Ma		Service	SCH	Scheduled		Yes	No	Yes	No	SHA001	No	
		T042	Bi-annually,	SRV	Service	SM	Scheduled	2	Yes	No	Yes	No	MUD001	Yes	

Help v2024.5.0.7/1.0 - Pg 13 - Printed: 04/07/2024



MNU.044.004

Help v2024.5.0.7/1.0 - Pg 14 - Printed: 04/07/2024

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