

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

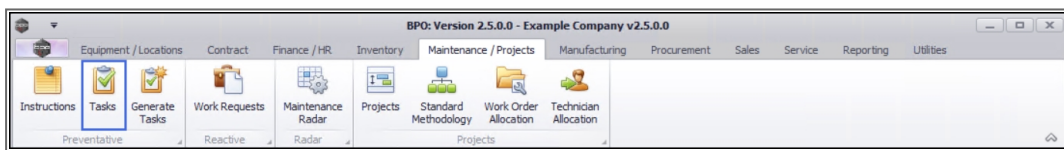
## MAINTENANCE

### 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.

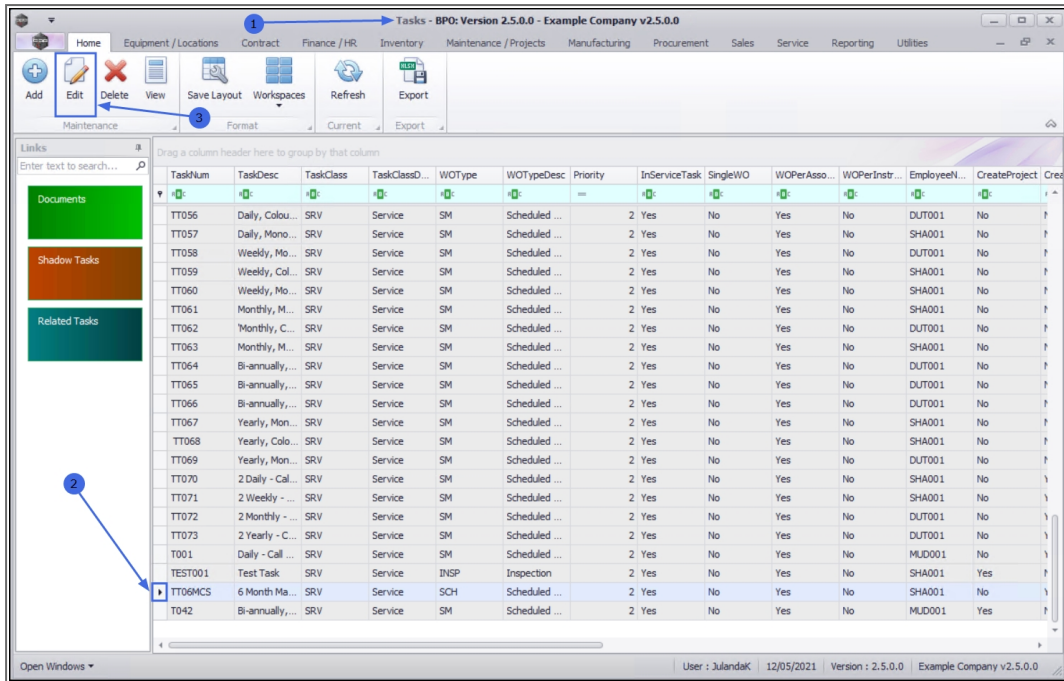
**Ribbon Access:** Maintenance / Projects > Tasks



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**.



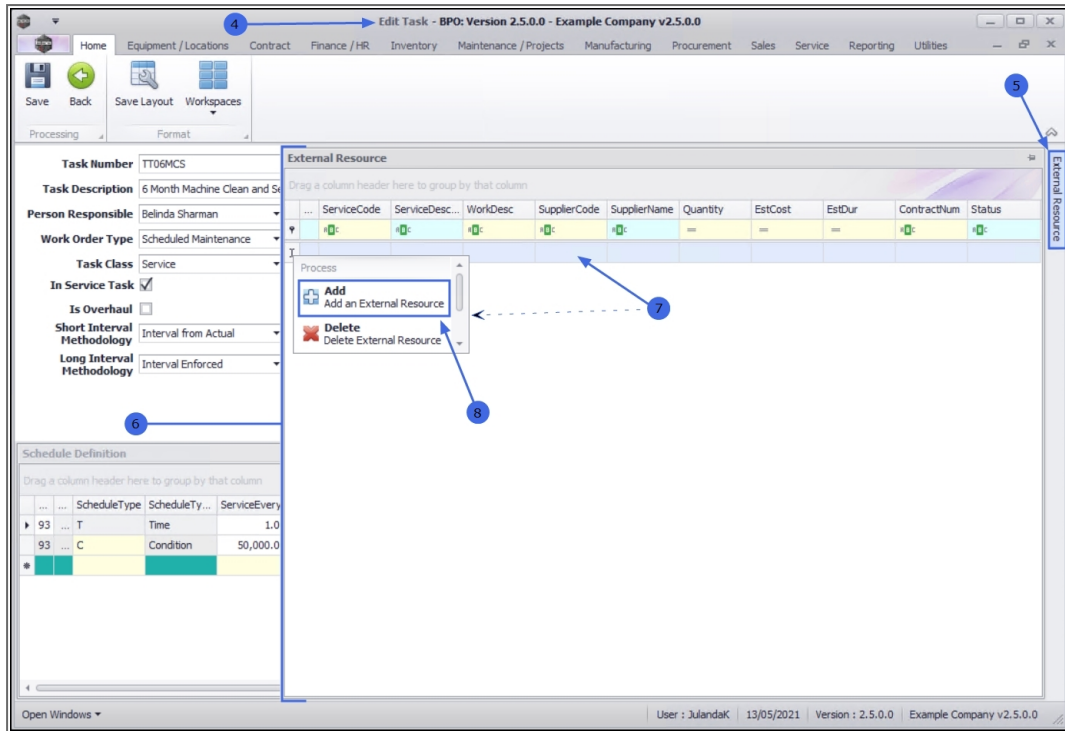
Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



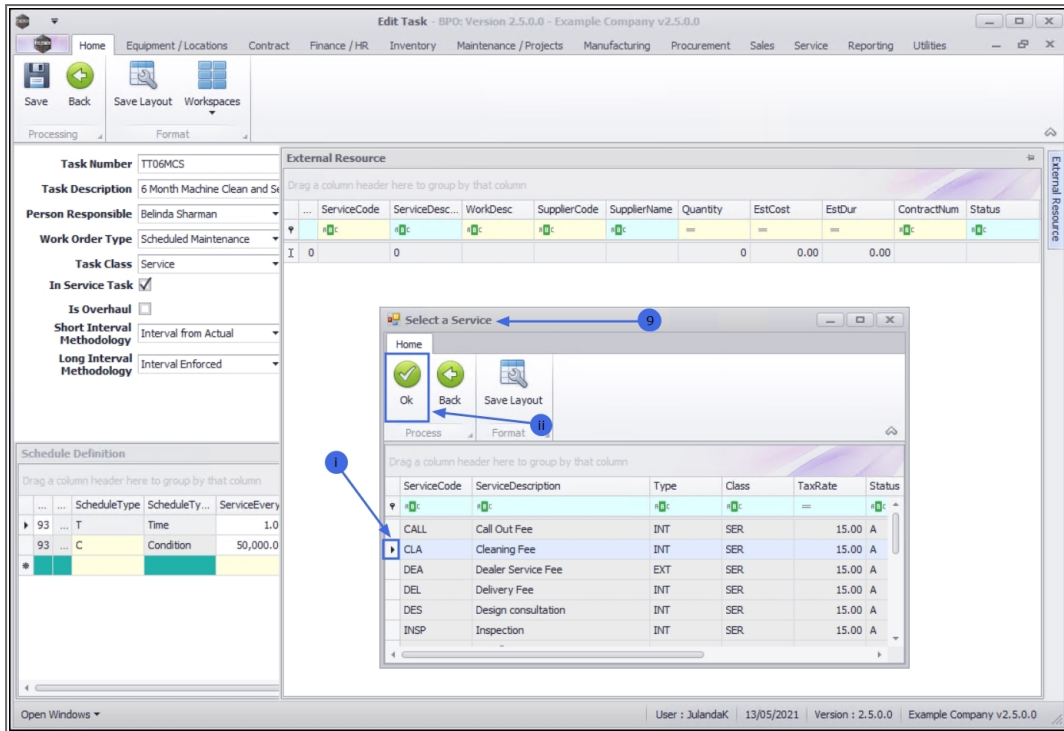
4. The **Edit Task** screen will be displayed.
5. Click on the **External Labour Resource** tab to display the External Resource frame.
6. **Expand** the External Resources Scheduled panel until all the columns can be viewed. This will make it easier to work with.

## 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.



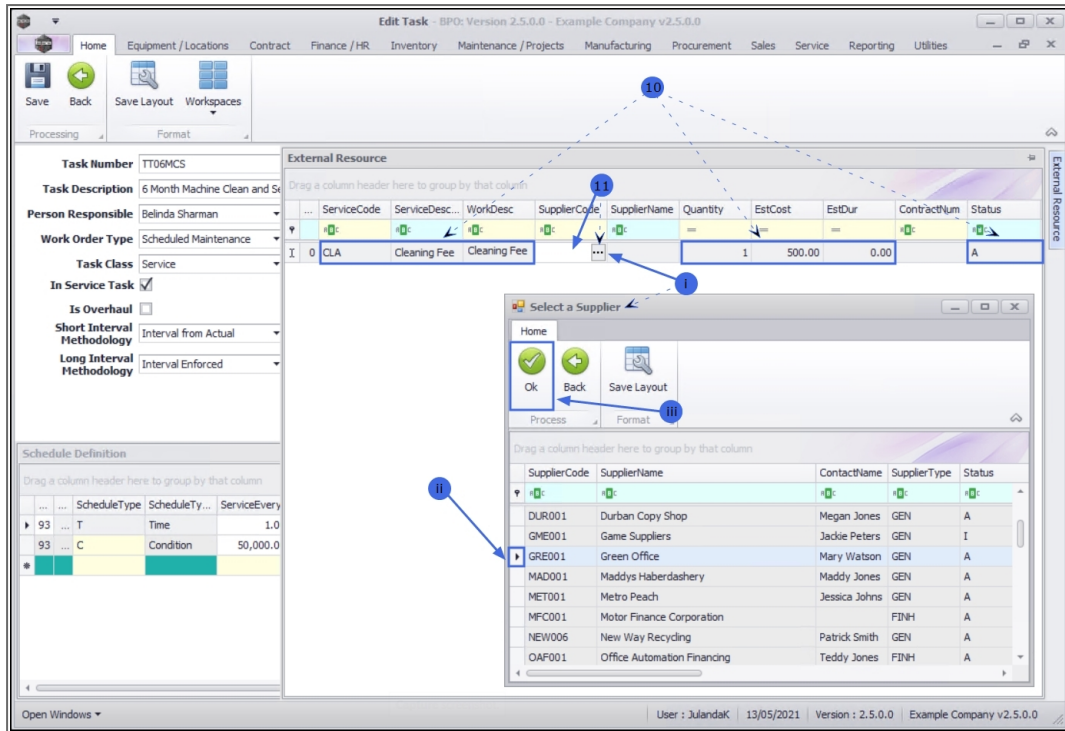
9. The **Select a Service** screen will be displayed.
  - i. Click on the **row** of the **service** you wish to assign to this task.
  - ii. Click on **OK**.



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

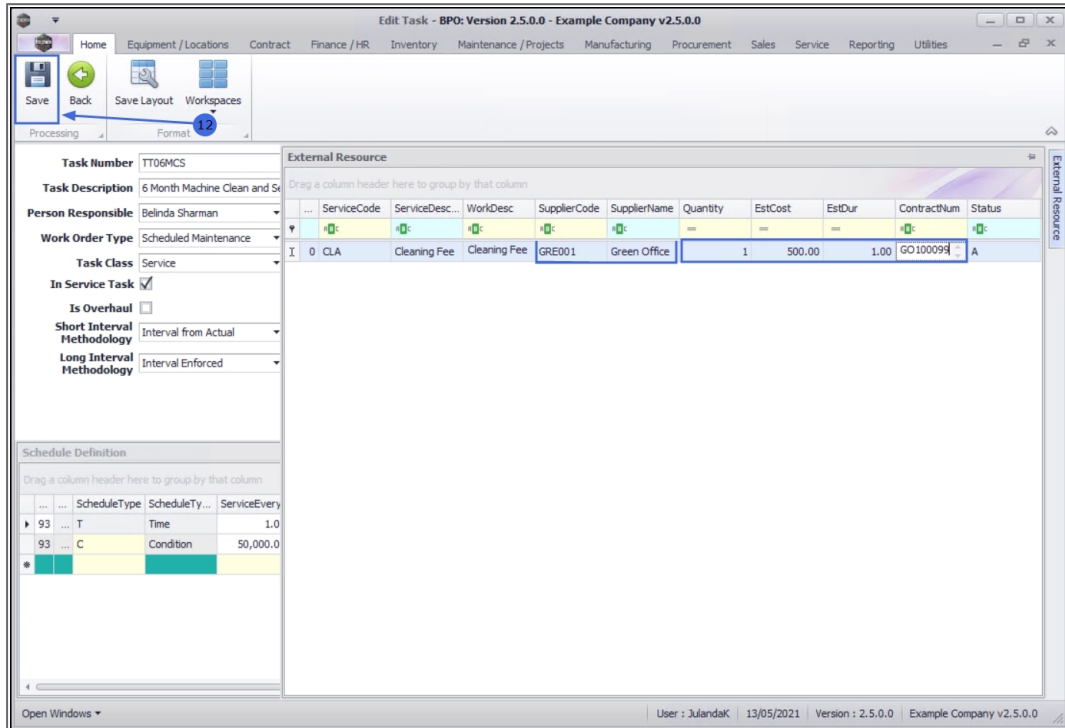
11. Click in the **Supplier Code** field to display an ellipsis button.
- i. Click on this button to display the **Select a Supplier** screen.
  - ii. Click on the **row** of the **supplier** you wish to outsource the task to.
  - iii. Click on **OK**.



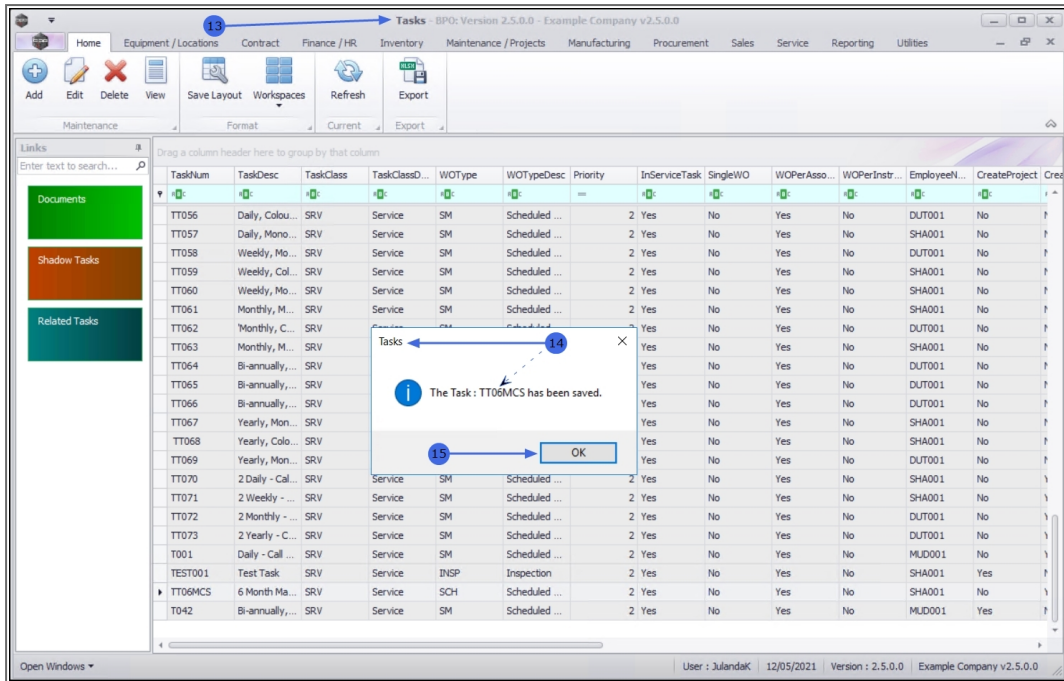
- The **Supplier Code** and **Supplier Name** fields will populate with the supplier information you have selected.
- **Quantity:** This field will be populated. To **change** the quantity, click in the field to **type** in or use the directional **arrows** to specify the number of external resources, 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**.

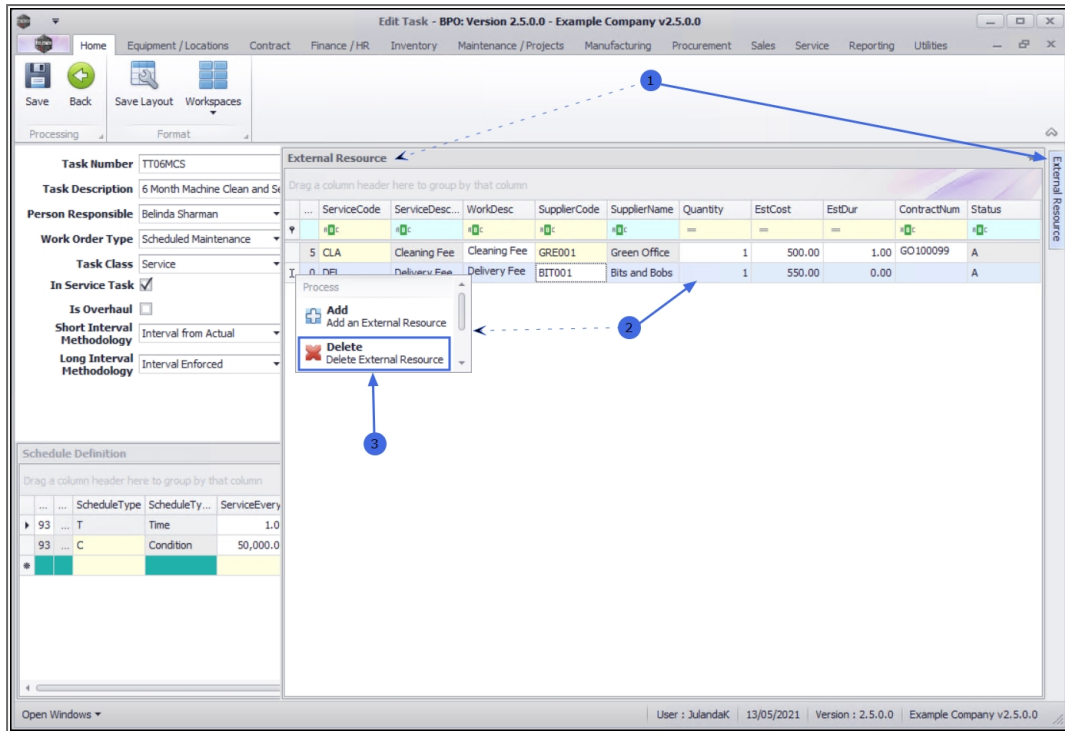


- You will return to the **Tasks** list screen.
- When you receive the **Tasks** message to confirm that;
  - The Task: [task number] has been saved.**
- Click on **OK**.



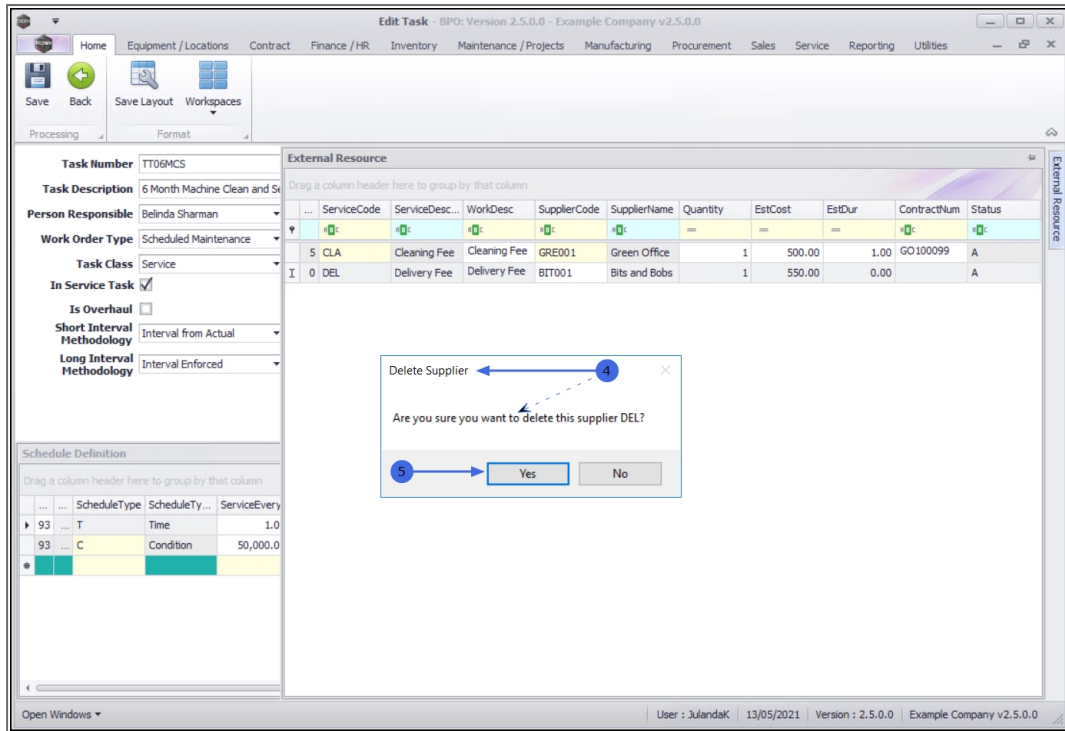
## REMOVE AN EXTERNAL LABOUR RESOURCE

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.

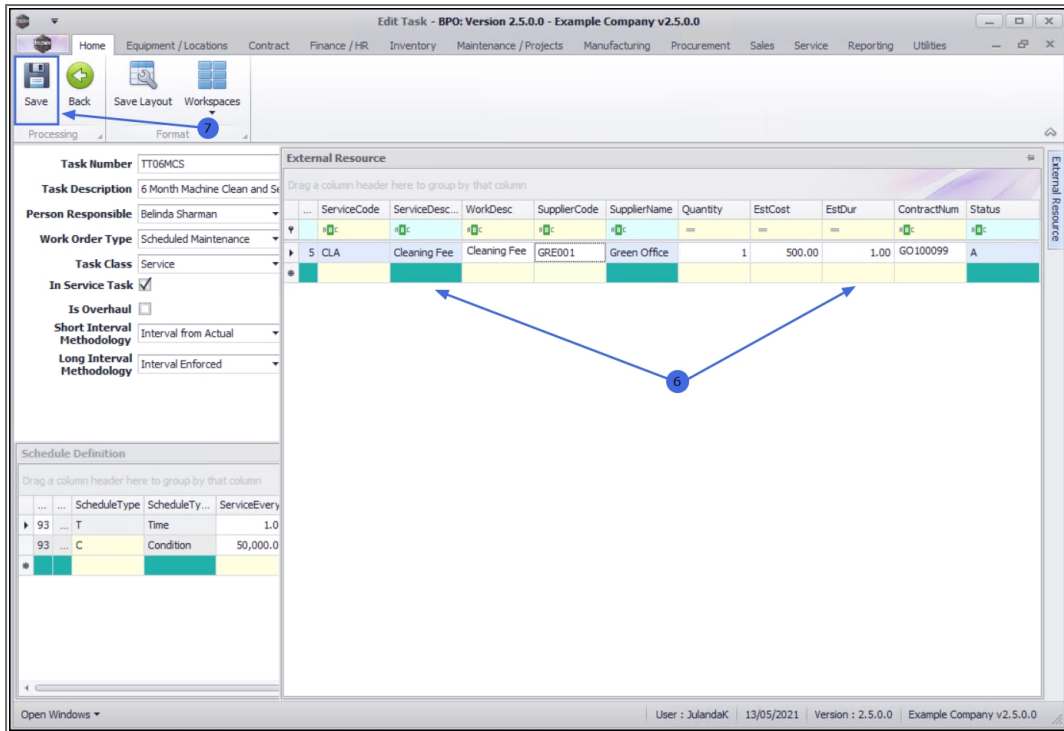


4. When you receive the **Delete Supplier** message to confirm;
  - **Are you sure you want to delete this supplier** [supplier code]?
5. Click on **Yes** if you are certain about your selection, or
  - Click on **No** to ignore the request and leave the supplier assigned to the Task.





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 active, 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-annualy...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT065	Bi-annualy...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	DUT001	No	?
TT066	Bi-annualy...	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-annualy...	SRV	Service	SM	Scheduled ...	2	Yes	No	Yes	No	MUD001	Yes	?

MNU.044.007

