

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

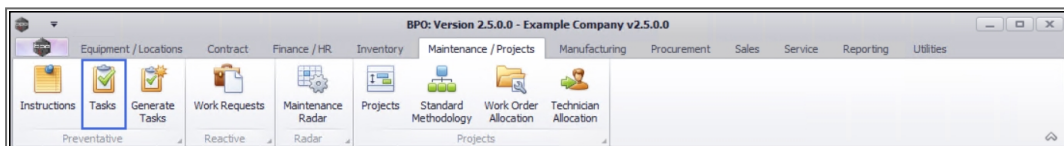
MAINTENANCE

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.

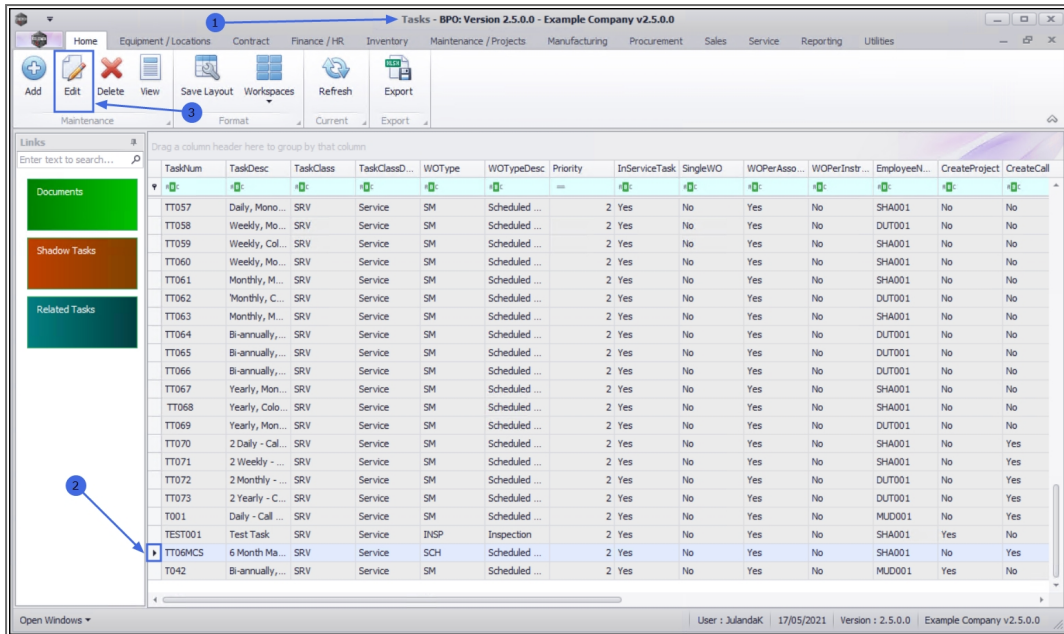
Ribbon Access: Maintenance / Projects > Tasks



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**.



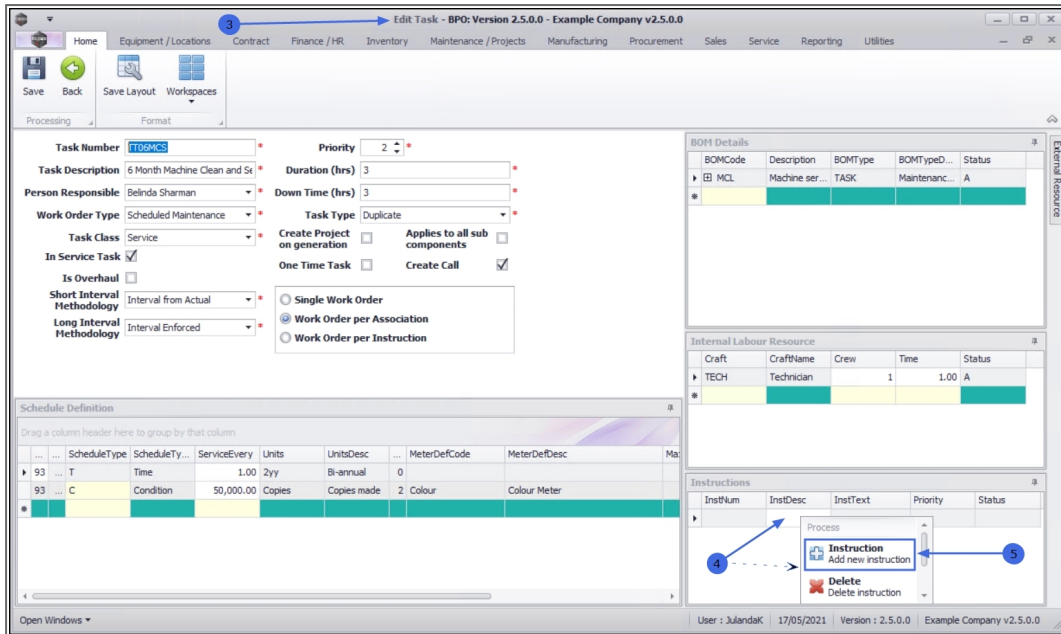
Short cut key: Right click to display the **Process** menu list. Click on **Edit**.



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

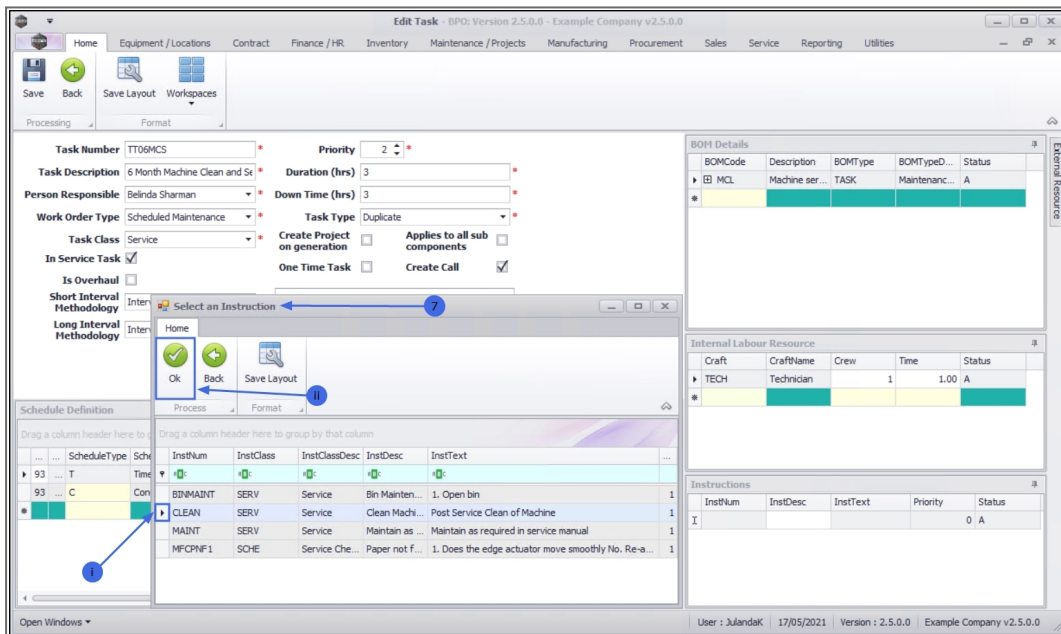
LINK AN INSTRUCTION

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**.

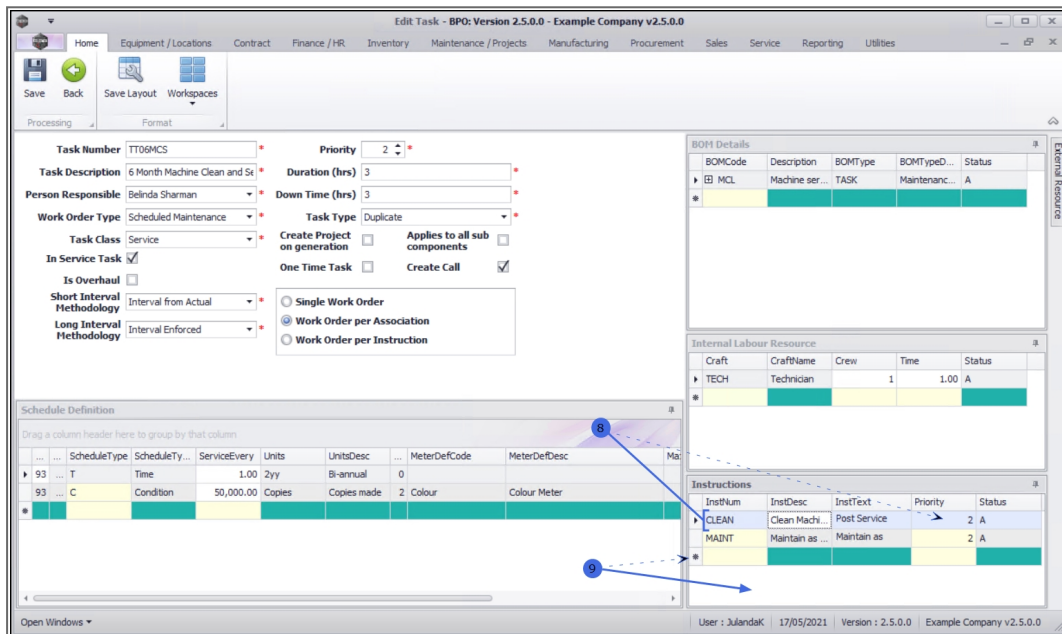


Instructions Details

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.

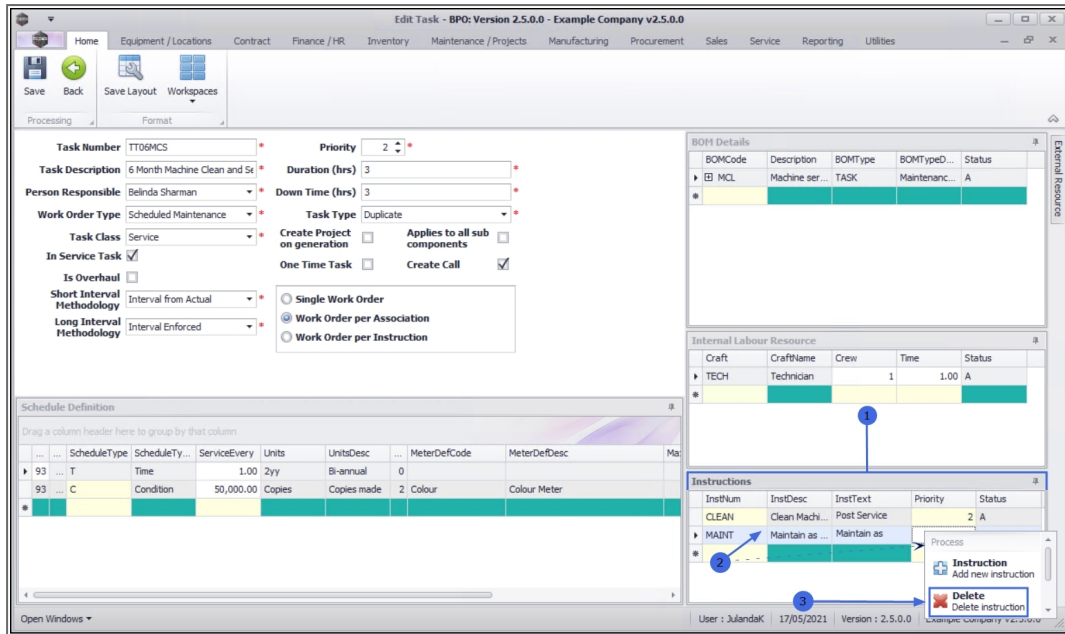
9. Continue adding instructions to this task, as required.



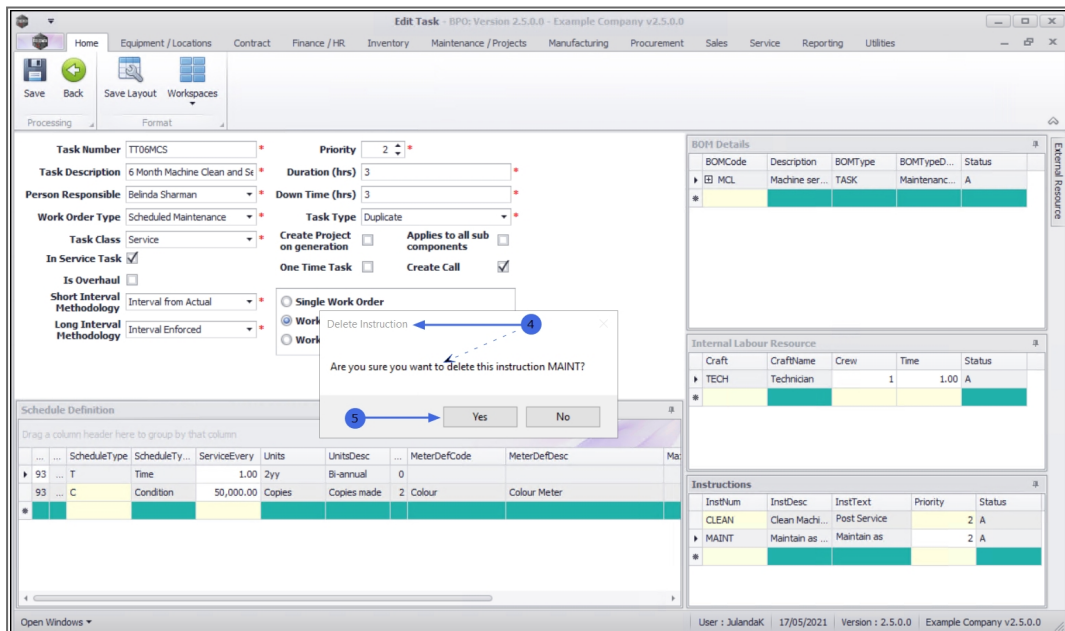
REMOVE AN INSTRUCTION

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

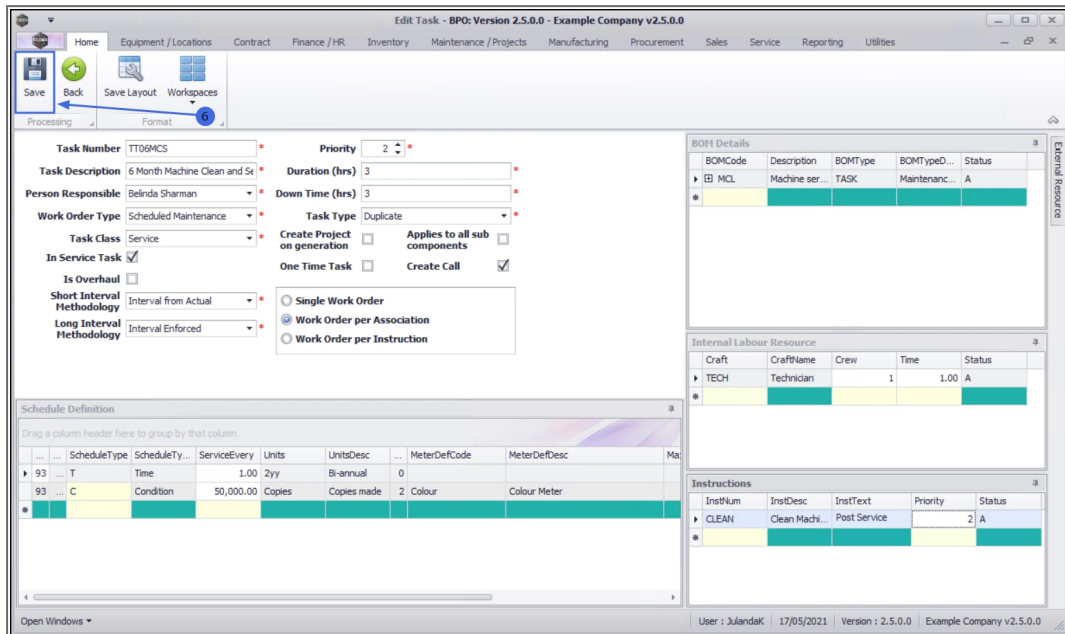


4. When you receive the **Delete Instruction** message to confirm;
 - Are you sure you want to delete this instruction [instruction number]?
5. Click on **Yes** if you are certain about your selection, or
 - Click on **No** to ignore the request and to leave the Instruction linked to the Task.



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' window in the CO3 software. The window title is 'Tasks - BPG: Version 2.5.0.0 - Example Company v2.5.0.0'. The interface includes a menu bar with options like Home, Equipment/Locations, Contract, Finance/HR, Inventory, Maintenance/Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, Refresh, and Export. A 'Links' sidebar on the left contains 'Documents', 'Shadow Tasks', and 'Related Tasks'. The main area is a table with columns: TaskNum, TaskDesc, TaskClass, TaskClassD..., WOType, WOTypeDesc, Priority, InServiceTask, SingleWO, WOPerAsso..., WOPerInstr..., EmployeeN..., CreateProject, and CreateCall. A dialog box titled 'Tasks' is overlaid on the table, containing the message 'The Task : TT05MCS has been saved.' and an 'OK' button. A blue arrow labeled '8' points to the dialog box, and another blue arrow labeled '9' points to the 'OK' button. The status bar at the bottom shows 'User : Julandak', '17/05/2021', 'Version : 2.5.0.0', and 'Example Company v2.5.0.0'.

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

