

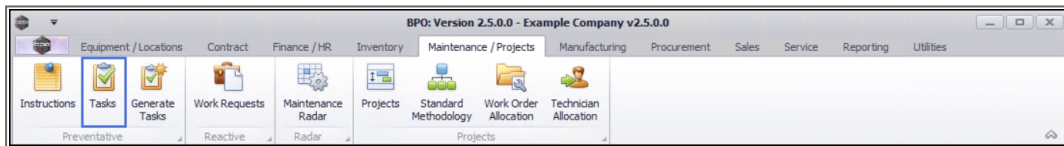
MAINTENANCE

TASKS - ADD A TASK

If the Company Configuration is set to **Auto Apply Task Configuration to WO**, then all required resources for the task will be created as requested on all the work orders that are created with the same **Work Order Type**. If this is the case, make sure that each task is linked to a different Work Order Type.

The **Auto Apply Task to WO** functionality is meant for use in a simplified planned maintenance environment where Project Methodology is not used. These two functionalities cannot be used together.

Ribbon Access: *Maintenance / Projects > Tasks*



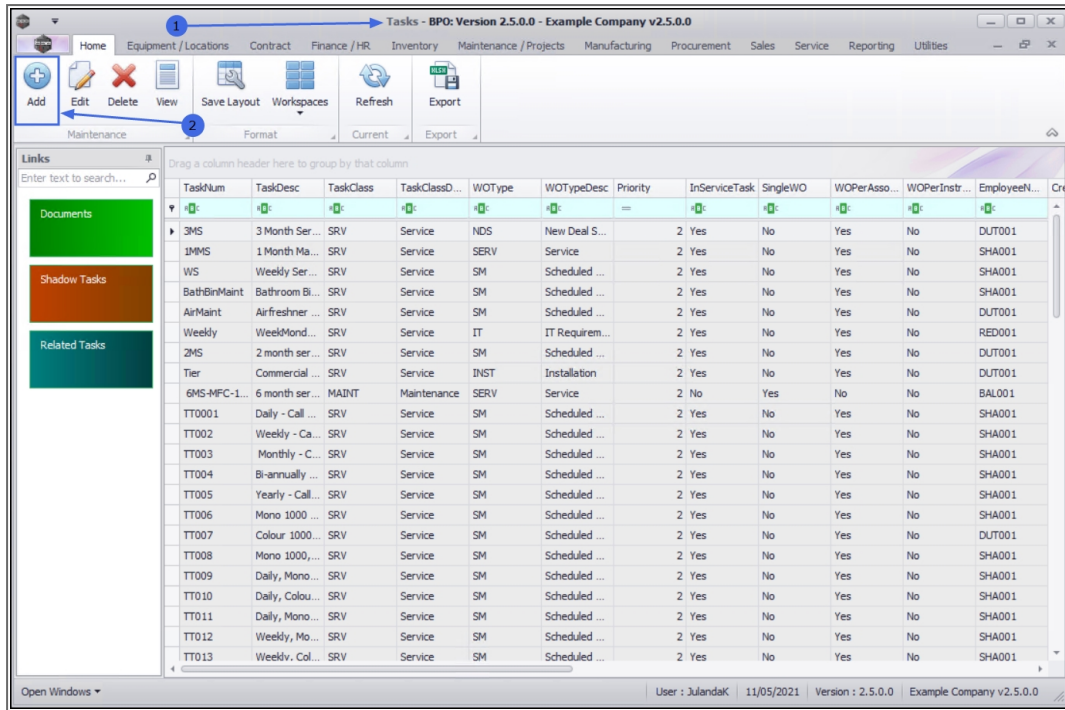
1. The **Tasks** listing screen will be displayed.

ADD AN INSTRUCTION

2. Click on **Add**.



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



3. The **Add New Task** screen will be displayed.

TASK DETAILS

- **Task Number:** Type in the number for the task.
- **Task Description:** Type in a short description to identify the task.
- **Person Responsible:** Click on the drop-down **arrow** and select the person who will be responsible for this task, from the menu list.
- **Work Order Type:** Click on the drop-down **arrow** to select the work order type, from the menu list, e.g. **Scheduled Maintenance**.



Note 1: If the Company Configuration is set to **Auto Apply Task Configuration** to WO (as explained in Important Notes), then all required resources on this task will be created as requests, on all work orders that are created with the same Work Order Type. Alternatively, make sure that each task is linked to a different Work Order Type.



Note 2: The selected work order type code must also exist as a **call type code** if you want to call to be auto generated from the task.

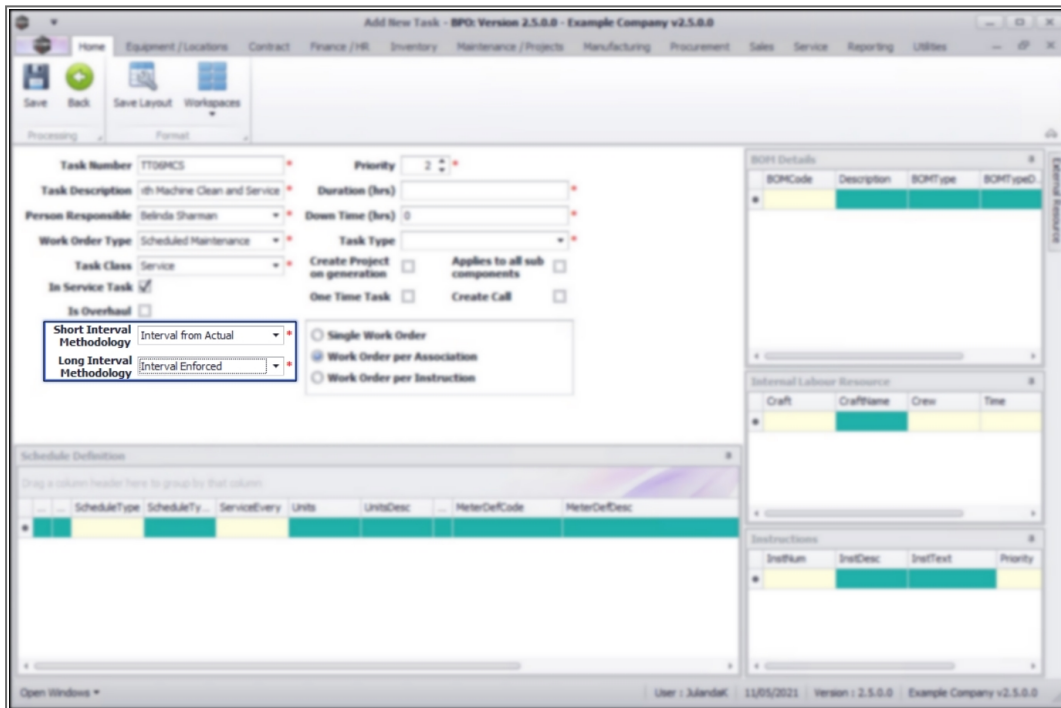
- **Task Class:** Click on the drop-down **arrow** to select a task class from the menu list, e.g. **Maintenance**.
- **In Service Task:** Click on the **check box** if this is an In Service task.
- **Is Overhaul:** Click on the **check box** if this is an Overhaul task.

INTERVAL METHODOLOGY

You will need to set the Interval Methodology for this task.

- **Short Interval Methodology:** Click on the drop-down **arrow** to select the short term methodology for this task, from the menu list.

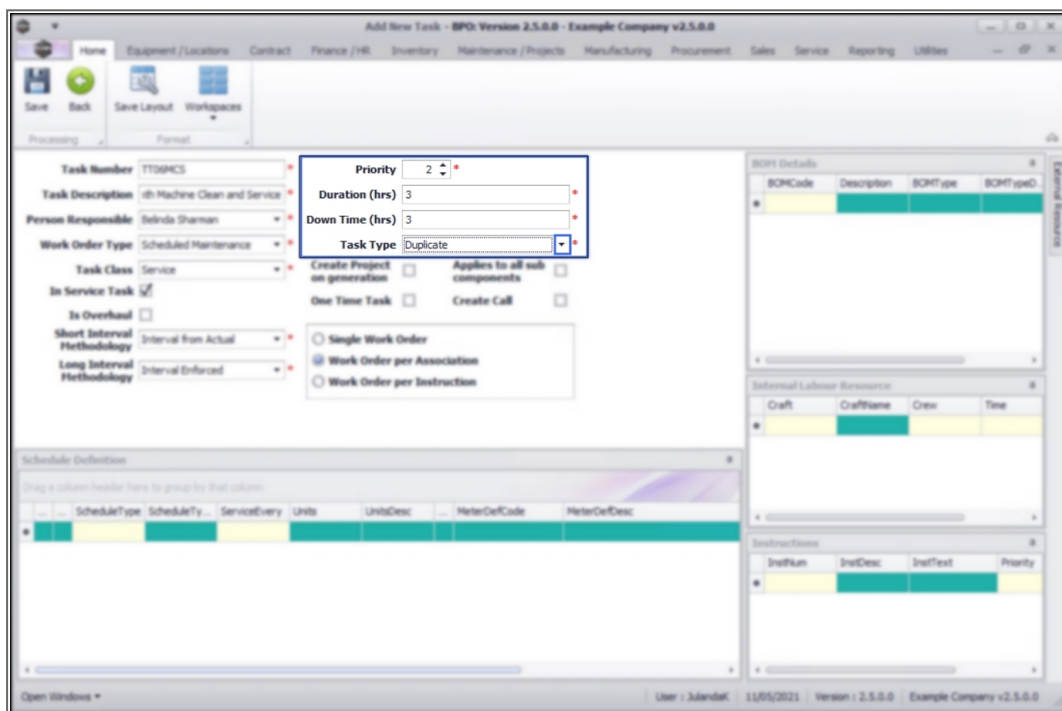
- I - Interval from Actual¹
- IT - Interval with Tolerance²
 - The example has the task due every **14 days** and have therefore **Interval from Actual** selected.
- **Long Interval Methodology:** Click on the drop-down **arrow** to select the long term methodology for this task, from the menu list.
 - I - Interval from Actual (.....)
 - IE - Interval Enforced (.....)
 - The example has the task scheduled as due on day **28** and therefore **Interval Enforced** has been selected.



¹This is an interval that covers the specified future output for the task.

²This is an interval that likely covers the specified future output for the task.

- **Priority:** Specify the **priority level**¹ for the work.
- **Task Duration (hrs):** Specify how long, in hours, it will take to complete the task.
- **Down Time (hrs):** Specify how long, in hours, the machine will not be ***in working order*** due to the task being completed.
- **Task Type:** Click on the drop-down **arrow** and select the relevant task type from the menu list.
 - **D - Duplicate**²
 - F - Absolute
 - **V - Relative**³



- **Create Project on generation:** Click on the **check box** if you would like to create a project when this task schedule is

¹1 = most important and 5 = least important

²You will most likely always select Duplicate as the task type.

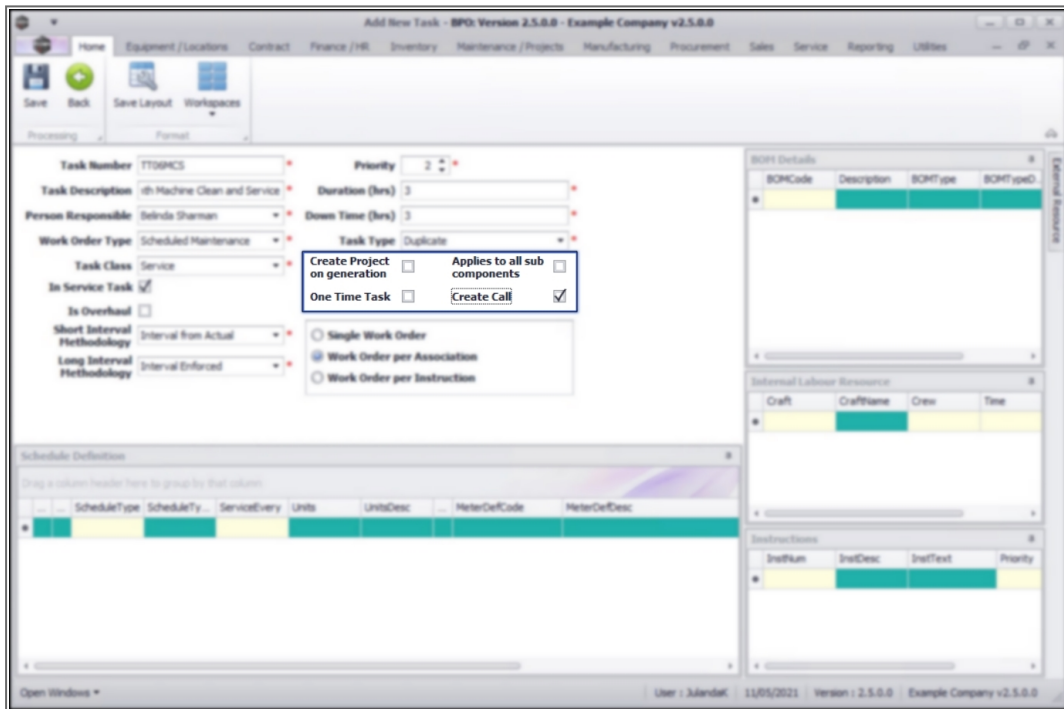
³The time interval between the start of the task and the completion of the realtime task

generated.

- **One Time Task:** Click on the **check box** if the task is not a repetitive task and needs to be completed once only.
- **Applies to all sub components:** Click on the **check box** if you would like to assign the task, with all its sub-components, to the main component.
- **Create Call:** Click on the **check box** if you would like to create a call per work order for the task. Use this option when the tasks are being generated for services on machines that are located at the Customer.



Note that the selected **work order type code** must exist as a **call type code** if you want a call to be auto generated from the task.



GENERATE STRATEGY

In this section, you can decide whether to create a:

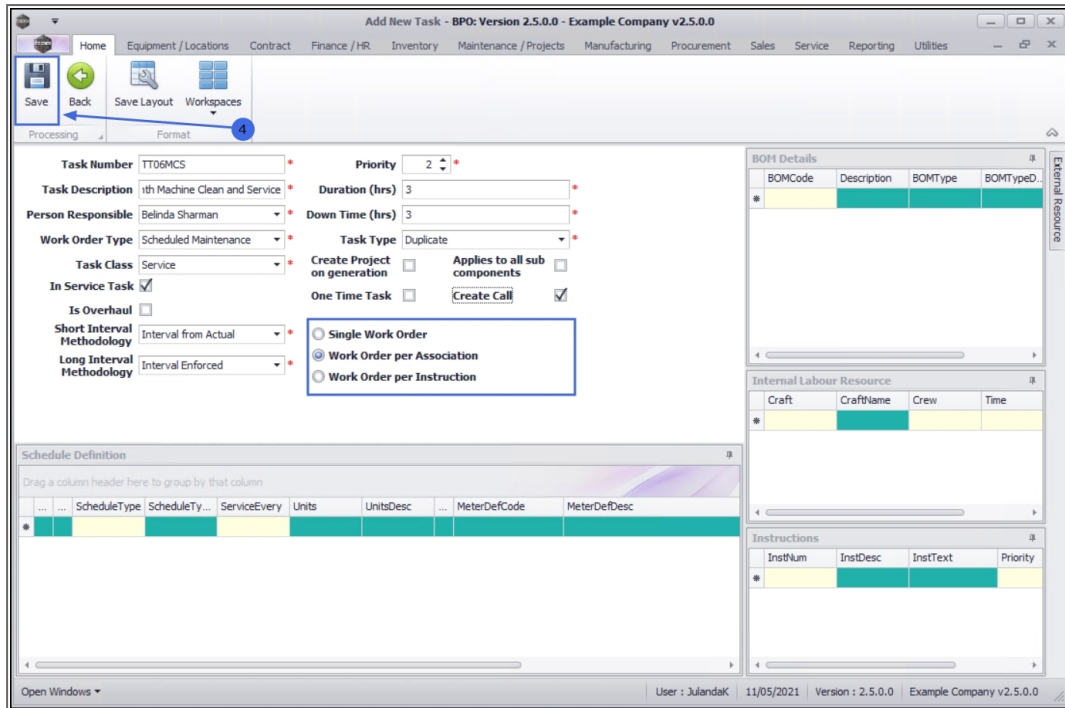
- **Single Work Order:** Selecting this option will create *one work order* for all the components that have the same inspection due.
- **Work Order per Association:** This is the *default* and *recommended* option as it will create a *work order per machine*.
- **Work Order per Instruction:** Selecting this option creates a *work order per instruction* that is assigned to the inspection and will link all machines to the same work order.

You are now ready to:

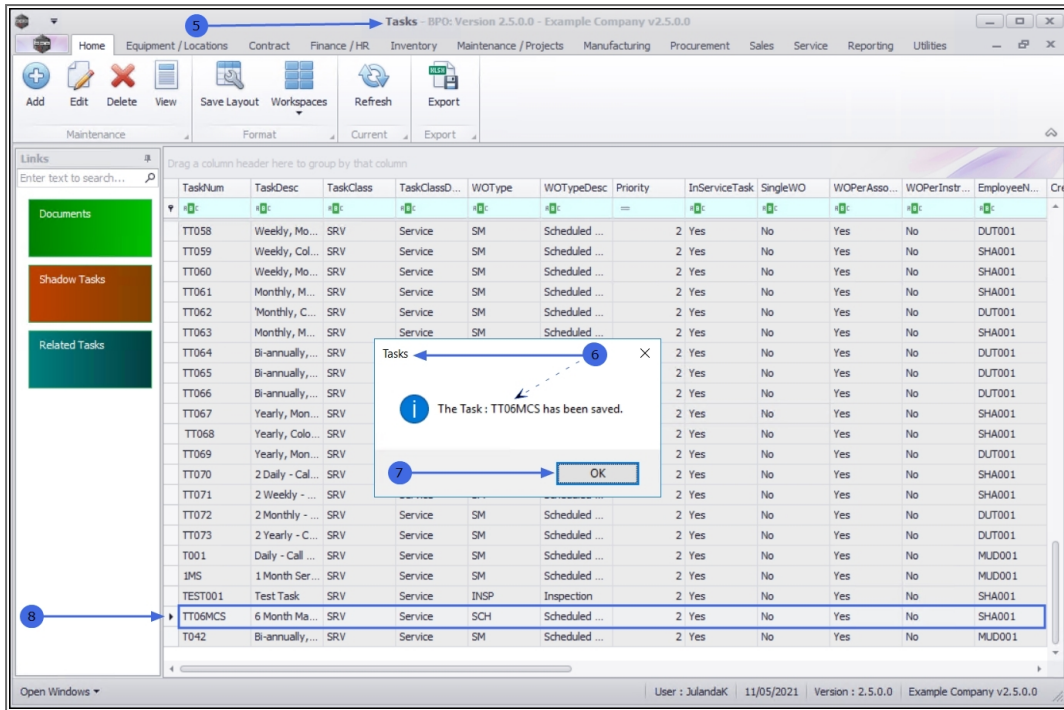
- Add a [Generation Methodology](#) to the task.
- Link an [Instruction](#) to the task. At least one instruction must be linked to the task.
- Add [BOM details](#), [Internal Labour Resources](#) and [External Labour Resources](#) where applicable.

SAVE THE TASK

4. When you have finished adding all the relevant information to the task details from, click on **Save**.



5. You will return to the **Tasks** listing screen.
6. When you receive the **Task** message to confirm that;
 - **The Task: [task number] has been saved.**
7. Click on **OK**.
8. The Task listing screen has been updated with the new task details.



Related Topics

- [Add the Generation Methodology](#)
- [Link Instructions](#)
- [Assigning BOM Details](#)
- [Assigning Internal Labour Resources](#)
- [Add External Labour Resources](#)

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