# Editing a Schedule

Note:

- Changes to a schedule will not impact previously dispatched work orders, only future work orders.

Work order schedules can be edited on the associated Equipment Details screen, under the Schedules tab.

There are several editable subsections for each schedule.

Editing a Schedule's Base Task

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the top section of the schedule card.
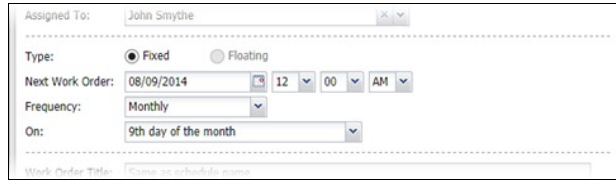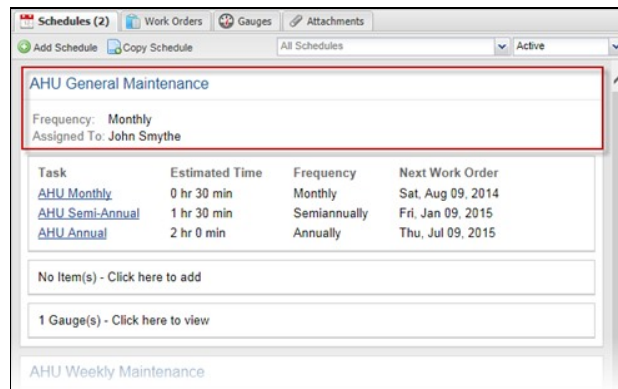

2. An Edit Schedule window will open. In the first section, users can update the following information:
   - The schedule name
   - The base task that the schedule will use
   - The estimated time to complete the task
   - The priority
   - Who the work order will be assigned to (this is not a required field)
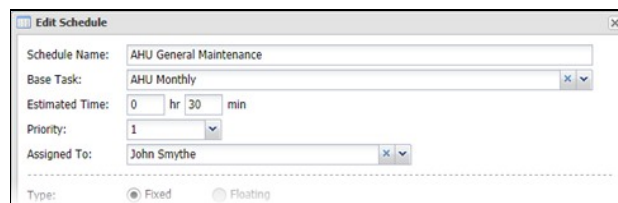
3. In the next section, users can modify the following scheduling information:
   - The date and time that the next work order should be due for completion
   - The frequency (Daily, Weekly, Monthly, Quarterly, Semiannually, Annually, More

Options)

- Users can use More Options to select a custom frequency, such as every 4 years, every 8 days, etc.
- If users select a frequency that is one month or longer, the On drop-down is displayed, allowing users to select the day or week of the month (e.g. 15th day of the month, 2nd Wednesday of the month, etc.)
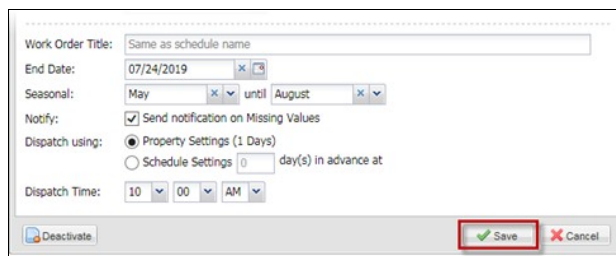

4. In the last section, users can edit the following optional work order details:
   - A work order title (default is same as the schedule name).
   - An end date, after which the schedule will stop generating work orders.
   - Seasonal scheduling, where users can specify an interval of months in the year where the work orders should be scheduled (outside of this interval, work orders will not be scheduled during the year). If this schedule is not seasonal, leave these fields blank.
   - Whether or not a notification should be sent if a work order is completed with missing values (checked by default).
   - Dispatch options (either the property's default dispatch options, or a custom number of days in advance).
   - Dispatch time.

Note:

- If automatic dispatching is not enabled for the property, then dispatch options cannot be selected (all work orders must be manually dispatched). Users will also see additional text in this section indicating that this is because automatic dispatching is turned off. To set automatic dispatch options for a property, see PM Work Order Dispatch Options.

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5. Click **Save** once finished.

Adding or Editing Subtasks (Multitask Schedules)

Note:

- Changes to subtasks will not affect previously dispatched work orders, only future work orders.

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1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Subtask section of the schedule card.

2. In the Associate Tasks window that opens, users can add, edit or remove subtasks.
    - For reference, the base task is listed but must be edited from the schedule (see Editing a Schedule's Base Task, above).

3. Users can edit existing subtasks using the drop-down menus. The following details can be modified:
    - **Task Name:** Users can select a different task to replace the current subtask.
    - **Estimated Time:** The default time is auto-filled when users add or change the subtask.
    - **Frequency:** It is important to note that the frequency of the subtask is based on the base task. In the example below, the base task is performed monthly; subtasks will have a minimum monthly frequency, so they can align with the base task's scheduling.
    - **Next Work Order:** The next date where this subtask will be included on work orders generated by this schedule. The Next Work Order drop-down provides options which are compatible with the subtask's frequency and the dispatch dates for the base task.

Note:
- A maximum of 5 tasks are permitted

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4. Users can remove a subtask by clicking the associated **Delete** button (🔴).
5. To add a subtask:
    - Click **Add Task**.

    - A row is added in the associate tasks window, where users can select a new subtask. The same rules apply as when editing a subtask in (3) above.

6. Click **Save** once finished.

Adding or Editing Items

Items describe a collection of equipment items that must be attended to in a schedule. Each schedule can have a maximum of 99 Items. Items are useful in situations where identical work is performed on multiple pieces of equipment, such as fire extinguishers or fire alarms. Each item that appears in a work order generated from a Preventive Maintenance (PM) schedule can be marked as Pass or Fail by the person completing the work order.

Items may be created, edited, or deleted from within a PM schedule. For each item, a space is provided to enter a description, location and type.

When creating Items, it is recommended that they be given meaningful names and descriptions in the fields provided. This makes it easier for an Engineer using a handheld device to locate the Item and thus facilitate the process of completing the specified task(s).

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Items section of the schedule card.

2. In the Edit Scheduled Items window, users can:
   - Add an item by clicking **Add Item**, then filling in the Description, Location and Type fields.
   - Edit an item by modifying the information in the Description, Location and Type fields.
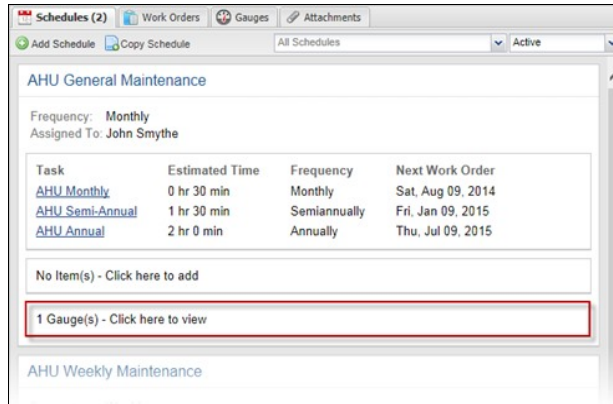   - Remove an item by clicking the associated **Delete** button (⊖).
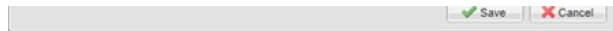
3. Click **Save** once finished.

Adding or Editing Gauges in a Schedule

To add a gauge to a schedule, users must first add at least one gauge to the equipment under the Gauges tab.

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Gauges section of the schedule card.

2. In the Associate Gauges window that opens, a list of gauges that have been defined for the equipment under the Gauges tab are displayed.
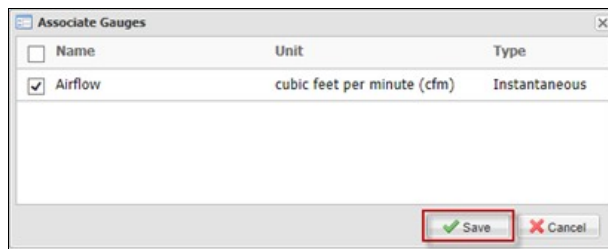
3. Place a checkmark beside the gauges that readings should be taken for on this schedule (removing a checkmark beside a gauge will remove the gauge from the schedule).
4. Click **Save**.