

Adding Tasks

Adding Tasks:

Tasks can be added in the Task Library list. Tasks are reusable; for example, if they are sufficiently generic, then a single "boiler cleaning" task could be used in schedules for any boiler unit in the Equipment list.

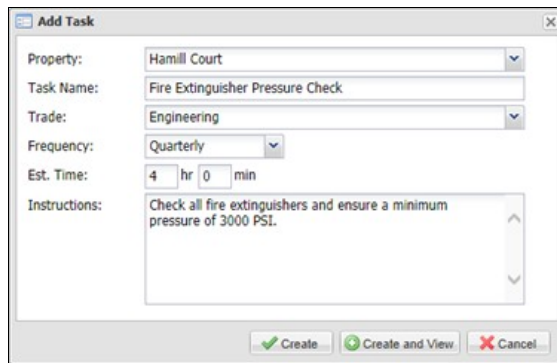
Note:

- In cases where it is not possible (or reasonable) to create a generic task suitable for all similar pieces of equipment, separate **appropriately named** tasks should be entered into the system; this will allow the correct task to be more easily identified when setting up schedules for your equipment.

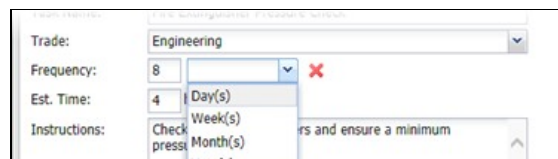
1. From the Task Library list, click **Add Task**.



2. Provide the following information in the Add Task window:

A screenshot of the 'Add Task' dialog box. The 'Property' dropdown is set to 'Hamill Court'. The 'Task Name' text box contains 'Fire Extinguisher Pressure Check'. The 'Trade' dropdown is set to 'Engineering'. The 'Frequency' dropdown is set to 'Quarterly'. The 'Est. Time' is set to '4 hr 0 min'. The 'Instructions' text area contains 'Check all fire extinguishers and ensure a minimum pressure of 3000 PSI.'. At the bottom, there are three buttons: 'Create', 'Create and View', and 'Cancel'.

- The Property where the task will be taking place (only corporate tasks apply to all properties).
- Create a name for the task.
- Select the trade that this task applies to.
- Select how frequently the task should occur in the Frequency field. The following options are available: Daily, Weekly, Monthly, Quarterly, Semi-annually, Annually, or More Options...
 - Clicking "More Options" changes the drop-down, allowing users to select a more specific time interval, such as 8 months, 4 years, etc., as shown below.





- Enter the estimated time it will take to complete the task, and any general instructions concerning the task.
3. Click **Create** to create the task, or **Create and View** to create the task and then view the Task Details screen, where users can edit the task. See [Editing Tasks](#) for additional details.