





## 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. It contains the following fields: 'Property' (Hamill Court), 'Task Name' (Fire Extinguisher Pressure Check), 'Trade' (Engineering), 'Frequency' (Quarterly), 'Est. Time' (4 hr 0 min), and 'Instructions' (Check all fire extinguishers and ensure a minimum pressure of 3000 PSI). At the bottom 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.

A screenshot of the 'Add Task' dialog box with the 'Frequency' dropdown menu open. The dropdown shows options: '8', '4', 'Day(s)', 'Week(s)', 'Month(s)', and 'Year(s)'. The '8' option is selected. A red 'X' is visible in the top right corner of the dropdown menu.



- 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.