Adding Tasks

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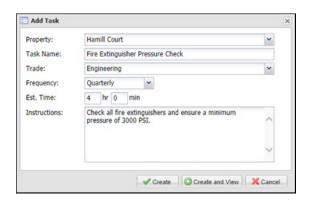
Tasks can be added in the Task Library list. Tasks are reusable; for example, if they are sufficiently generic, then a single "boiler cleaning" task could be used in schedules for any boiler unit in the Equipment list.

Note:

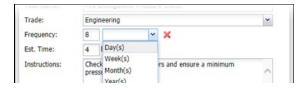
- In cases where it is not possible (or reasonable) to create a generic task suitable for all similar
 pieces of equipment, separate appropriately named tasks should be entered into the
 system; this will allow the correct task to be more easily identified when setting up schedules
 for your equipment.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



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



- 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 <u>Editing Tasks</u> for additional details.