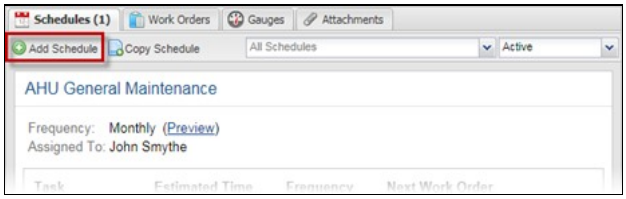
Adding a Schedule

Adding a Schedule:

Work order schedules can be added on the associated Equipment Details screen, under the Schedules tab. If users wish to create a schedule which uses multiple tasks (a multitask schedule), users must first create the schedule using a single task as a basis (referred to as the base task), then edit the schedule and add subtasks.

1. Under the Schedules tab, click **Add Schedule**.



2. An Add Schedule window will open. In the first section, enter 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)

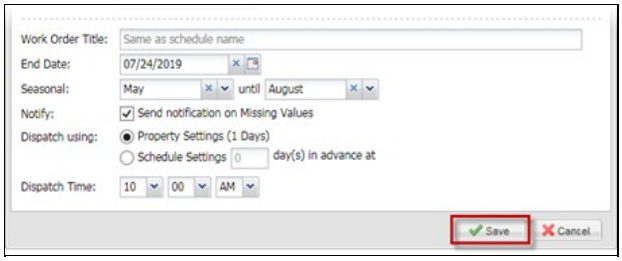
3. In the next section, enter the following scheduling information:
    - The work order Type
    - The date and time that the next work order should be scheduled for
    - The frequency (Daily, Weekly, Monthly, Quarterly, Semiannually, Annually, More Options)
        - Users can use More Options to 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, enter 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. 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). To set automatic dispatch options for a property, see PM Work Order Dispatch Options.



5. Click **Save** once finished.