



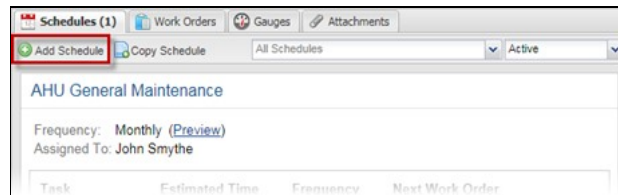


## Adding a Schedule

### 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)

A screenshot of the 'Add Schedule' window. It contains the following fields: 'Schedule Name' with the value 'AHU Annual Maintenance', 'Base Task' with a dropdown showing 'AHU Annual', 'Estimated Time' with '2' hours and '0' minutes, 'Priority' with a dropdown showing '1', and 'Assigned To' with a dropdown showing 'Joe Samson'. At the bottom, there are radio buttons for 'Type' with 'Fixed' selected and 'Floating' unselected.

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.)

A screenshot of the scheduling section of the 'Add Schedule' window. It shows 'Assigned To' as 'Joe Samson', 'Type' with 'Fixed' selected, 'Next Work Order' as '07/26/2014 8:00 AM', 'Frequency' as 'Annually', and 'On' as '26th day of the month'. At the bottom, there is a field for 'Work Order Title' with the value 'Same as schedule name'.

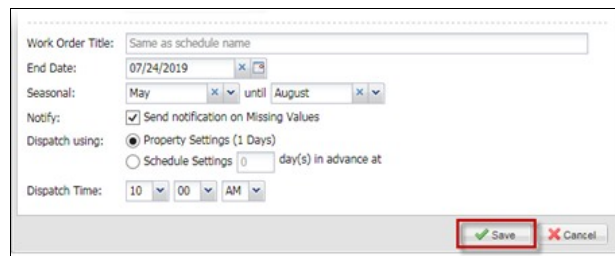
4. In the last section, enter the following optional work order details:

- 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.

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**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](#).
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The screenshot shows a 'Work Order' configuration dialog box. It contains the following fields and options:

- Work Order Title:** A text field with the value 'Same as schedule name'.
- End Date:** A date picker set to '07/24/2019'.
- Seasonal:** Two dropdown menus set to 'May' and 'August'.
- Notify:** A checked checkbox labeled 'Send notification on Missing Values'.
- Dispatch using:** Two radio buttons. The first, 'Property Settings (1 Days)', is selected. The second, 'Schedule Settings', is followed by a text field containing '0' and the text 'day(s) in advance at'.
- Dispatch Time:** Two dropdown menus set to '10' and '00', followed by a dropdown menu set to 'AM'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right. The 'Save' button is highlighted with a red rectangle.

5. Click **Save** once finished.