

How do I create a new task?

- 1. Click on **New task...**

Task details

General

Task description

Documents

Photos

Parts

Extra

ID:

Task name:

☐ Project task

☐ Use this task once

☐ Is defect

☐ Counter based

☐ Requires approval

☐ Is at service request

Group:

Budget code:

Scheduling

☐ Fixed Interval

Interval:

Months

Due date:

day/month/year

Warning period:

7

Days

Ranks

Other

Time needed:

Save

Save & close

Close

- 2. Fill out all the fields
- 3. Select a **Group**.
- 4. Select the correct interval for scheduling the task (see below)
- 5. Click on **Save & close**.

Scheduling options

Type	Explanation
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Time interval (default)	<p>Enter an Interval and select day, week or month. The Due Date is calculated based on today's date + interval.</p> <p>Extra option:</p> <ul style="list-style-type: none">• Fixed interval <div><div>Scheduling</div><div><div>Fixed Interval: <input type="checkbox"/></div><div>Warning period: 7 <div>⬆ ⬇ ⬆</div> Days <div>⌵</div></div><div>Interval: <div>⬆ ⬇ ⬆</div> Months <div>⌵</div></div><div>Due date: day/month/year <div>📅</div></div></div></div>
Counter based	<p>Enter an Interval and select a counter. Enter the Due Running Hours. If the current counter value has been entered, the hours will be added automatically.</p> <p>Extra options:</p> <ul style="list-style-type: none">• Fixed interval• Maximum interval <p>Enter an interval and select day, week or month. This option allows you to perform a task with time intervals in addition to the counter.</p> <div><div>Scheduling</div><div><div>Fixed Interval: <input type="checkbox"/></div><div>Warning period: <div>⬆ ⬇ ⬆</div> <div>⌵</div></div><div>Interval: <div>⬆ ⬇ ⬆</div></div><div>Maximum interval: <div>⬆ ⬇ ⬆</div> <div>⌵</div></div><div>Counter: <div>⌵</div></div><div>Due counter value: <div>⬆ ⬇ ⬆</div></div></div></div>
Project task	<p>Select if the project task should be added to a selected type of projects.</p> <div><div>Project types</div><div>Each Project <div>✖</div> <div>⌵</div></div></div>
Use this task once / Defect	<p>Select when the task should be performed.</p> <div><div>Scheduling</div><div>Due date: day/month/year <div>📅</div> Warning period: <div>⬆ ⬇ ⬆</div> <div>⌵</div></div></div>

Other fields:

- **ID:** This is a unique number that will be added before the task description.
- **Ranks:** Select one or more ranks. Only users with one of these ranks can see the task on the job list.
- **Time needed:** Specify how many hours are needed to perform this task.
- **Remark is mandatory:** When you sign off on a maintenance task, the comments field is required.
- **Attachment is mandatory:** When you sign off on a maintenance task, it is required to add a task completion document.