

Apply a Task Template to the Task Schedule

To apply a task template to the task schedule for bulk task creation, open the Task Schedule Page of the asset you want to apply a task template to.

How To: Apply a Task Template to the Task Schedule

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Task Schedule for Jump at it Cafe

Jump at it Cafe

Refresh Status Take out of service View Sub Components View Cost and Time

Meters
Blade change (Blender) : 10 (2023-05-20 13:42:39)
Test Motor (Blender) : 10 (2023-05-20 13:42:39)

Add Task Create Permissive Group Apply Task Template

Filters

Search Tags
Select Some Options

Set Filter Clear

With Selected Show completed tasks Show generator tasks

<< Page 1 of 1 >>

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	Morning Prep Vegetables and Fruits for Smoothies (0) ✓	Regular		No	2025-09-23 10:21:39	Every Day (Next due on
<input type="checkbox"/>	Sweep and Mop Floor (0) ✓	Regular		No	2025-09-23 10:21:27	Every Day (Next due on
<input type="checkbox"/>	Update Market prices (0) ✓	Regular		No	2025-09-23 10:21:50	Every Month (Next due
<input type="checkbox"/>	Wipe Counters (0) ✓	Regular		No	2023-06-30 11:53:07	Every Day (Overdue sin

Selecting the “Apply Task Template” button opens the Apply Task Template Modal that allows the user to copy tasks from a template into the task schedule for an asset or its components. This feature allows a user to utilize bulk task schedule creation if they have to track several assets that share identical task schedules.

A user will still be required to establish meters, due dates, and meter readings for each individual task in the task template.

Apply Task Template ✕

This will copy the tasks from the selected template into the task schedule for Equipment.

You will be required to choose any meters and decide when the first due dates or meter readings are for every task.

Template *

If a task with the same name and type exists *

Select the template from the dropdown list that you wish to utilize.

New Task Templates can be created on the Task Template Tab on the Settings Page of the Assets Module.

How To: Create a New Task Schedule Template

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A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the template task.

Select the "Continue" button, opening the Configure Template Page.

Configure Template

General Configuration

Set the first due date for all relevant rules to:

Set the expiry date for all relevant rules to:

Task Configuration

Lubricate machine
Every Month : Set First Due on to *

Wipe down machine
Every Day : Set First Due on to *

When you press save, all of the new tasks will be updated and set active.

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.

Configure Template

General Configuration

Set the first due date for all relevant rules to:

Set the expiry date for all relevant rules to:

Task Configuration

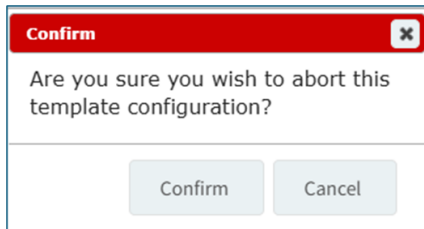
Lubricate machine
Every Month : Set First Due on to *

Wipe down machine
Every Day : Set First Due on to *

When you press save, all of the new tasks will be updated and set active.

Once the task template has been configured, select "Save" and all of the new tasks will be updated and set active.

Select "Abort" and a Confirmation Modal opens, stating, "Are you sure you wish to abort this template configuration?"



Select “Confirm” to return to the asset's Task Schedule Page without any changes made.

Task Schedule for Jump at it Cafe ⋮

Jump at it Cafe 📍 🔍 📌

Refresh Status Take out of service View Sub Components View Cost and Time

Meters
 Blade change (Blender) : 10 (2023-05-20 13:42:39)
 Test Motor (Blender) : 10 (2023-05-20 13:42:39)

Add Task Create Permissive Group Apply Task Template

Filters

Search **Tags**

Set Filter Clear

With Selected Show completed tasks Show generator tasks

« < Page 1 of 1 > »

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	Morning Prep Vegetables and Fruits for Smoothies 📍 (0) 🔍 📌 ⋮	Regular		No	2025-09-23 10:21:39	🟢 Every Day (Next due on 202
<input type="checkbox"/>	Sweep and Mop Floor 📍 (0) 🔍 📌 ⋮	Regular		No	2025-09-23 10:21:27	🟢 Every Day (Next due on 202
<input type="checkbox"/>	Update Market prices 📍 (0) 🔍 📌 ⋮	Regular		No	2025-09-23 10:21:50	🟢 Every Month (Next due on 2
<input type="checkbox"/>	Wipe Counters 📍 (0) 🔍 📌 ⋮	Regular		No	2023-06-30 11:53:07	🔴 Every Day (Overdue since 2

Selecting the “Apply Task Template” button opens the Apply Task Template Modal that allows the user to copy tasks from a template into the task schedule for an asset or its components. This feature allows a user to utilize bulk task schedule creation if they have to track several assets that share identical task schedules.

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Apply Task Template ✕

This will copy the tasks from the selected template into the task schedule for Equipment.

You will be required to choose any meters and decide when the first due dates or meter readings are for every task.

Template *

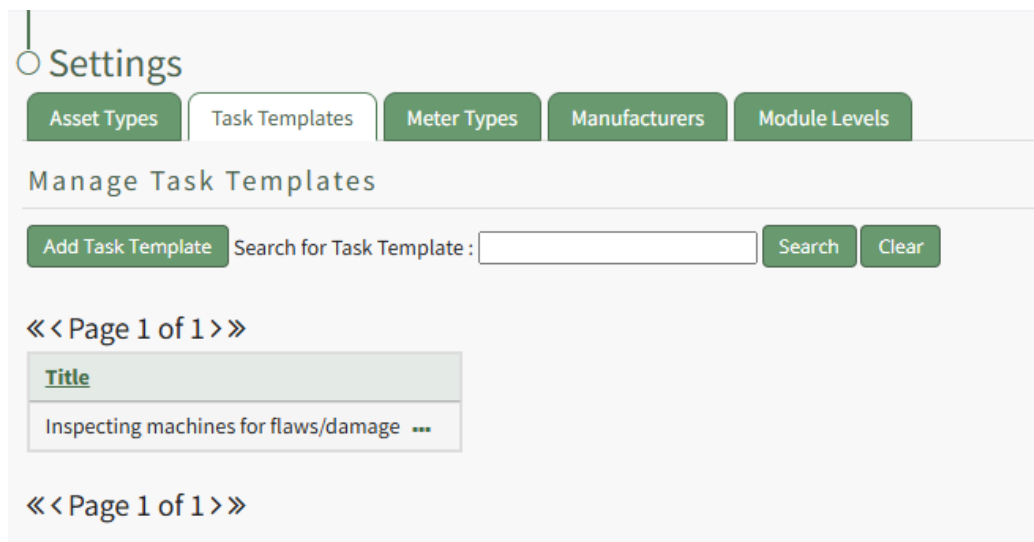
If a task with the same name and type exists *

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How To: Create a New Task Schedule Template

To create a new task schedule template, open the Task Template Tab on the Settings Page in the Assets Module.



Click the “Add Task Template” button, opening the New Task Template modal.

The screenshot shows a dialog box titled "New Task Template" with a close button in the top right corner. Below the title bar is a text input field labeled "Title *". Underneath is a section titled "Copy tasks from an existing asset" with a dropdown menu showing "(Do not copy any tasks)". A note below the dropdown reads "Note that tasks that follow other tasks will not be copied". At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Input the desired Title for the new task template.

Select which asset or component whose task schedule you want to create the template from.

Click "Save" and the new task template will show in the Task Template Table.

Tasks that follow other tasks will not be copied into the Task Template.

A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the template task.

Select the "Continue" button, opening the Configure Template Page.

Configure Template

General Configuration

Set the first due date for all relevant rules to:

Set the expiry date for all relevant rules to:

Task Configuration

Lubricate machine
Every Month : Set First Due on to *

Wipe down machine
Every Day : Set First Due on to *

When you press save, all of the new tasks will be updated and set active.

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.

Configure Template

General Configuration

Set the first due date for all relevant rules to: 2025-09-23

Set the expiry date for all relevant rules to:

Task Configuration

Lubricate machine
Every Month : Set First Due on to * 2025-09-23

Wipe down machine
Every Day : Set First Due on to * 2025-09-23

When you press save, all of the new tasks will be updated and set active.

Once the task template has been configured, select "Save" and all of the new tasks will be updated and set active.

Select "Abort" and a Confirmation Modal opens, stating, "Are you sure you wish to abort this template configuration?"

Confirm
✕

Are you sure you wish to abort this template configuration?

Confirm
Cancel

Select “Confirm” to return to the asset's Task Schedule Page without any changes made.

Task Schedule for Jump at it Cafe
⋮

● Jump at it Cafe 🔍 📄 📌

Refresh Status
Take out of service
View Sub Components
View Cost and Time

Meters

Blade change (Blender) : 10 (2023-05-20 13:42:39)

Test Motor (Blender) : 10 (2023-05-20 13:42:39)

Add Task
Create Permissive Group
Apply Task Template

Filters

Search

Set Filter
Clear

Tags

With Selected
 Show completed tasks
 Show generator tasks

« Page 1 of 1 »

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	● Morning Prep Vegetables and Fruits for Smoothies 🔍 📄 📌 (0) ☑️ ⋮	Regular		No	2025-09-23 10:21:39	● Every Day (Next due on 2025-09-23)
<input type="checkbox"/>	● Sweep and Mop Floor 🔍 📄 📌 (0) ☑️ ⋮	Regular		No	2025-09-23 10:21:27	● Every Day (Next due on 2025-09-23)
<input type="checkbox"/>	● Update Market prices 🔍 📄 📌 (0) ☑️ ⋮	Regular		No	2025-09-23 10:21:50	● Every Month (Next due on 2025-10-23)
<input type="checkbox"/>	● Wipe Counters 🔍 📄 📌 (0) ☑️ ⋮	Regular		No	2023-06-30 11:53:07	● Every Day (Overdue since 2023-06-30)

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A user will still be required to establish meters, due dates, and meter readings for each individual task in the task template.

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You will be required to choose any meters and decide when the first due dates or meter readings are for every task.

Template *

If a task with the same name and type exists *

Select the template from the dropdown list that you wish to utilize.

New Task Templates can be created on the Task Template Tab on the Settings Page of the Assets Module.

How To: Create a New Task Schedule Template

To create a new task schedule template, open the Task Template Tab on the Settings Page in the Assets Module.

Settings

Asset Types Task Templates Meter Types Manufacturers Module Levels

Manage Task Templates

Search for Task Template:

« « Page 1 of 1 » »

Title
Inspecting machines for flaws/damage ...

« « Page 1 of 1 » »

Click the “Add Task Template” button, opening the New Task Template modal.

New Task Template ✕

Title *

Copy tasks from an existing asset

(Do not copy any tasks) ▼

Note that tasks that follow other tasks will not be copied

Save Cancel

Input the desired Title for the new task template.

Select which asset or component whose task schedule you want to create the template from.

Click “Save” and the new task template will show in the Task Template Table.

Tasks that follow other tasks will not be copied into the Task Template.

A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the template task.

Select the “Continue” button, opening the Configure Template Page.

Configure Template

General Configuration

Set the first due date for all relevant rules to: Go

Set the expiry date for all relevant rules to: Go

Task Configuration

Lubricate machine
Every Month : Set First Due on to *

Wipe down machine
Every Day : Set First Due on to *

When you press save, all of the new tasks will be updated and set active.

Save Abort

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.

Configure Template

General Configuration

Set the first due date for all relevant rules to:

Set the expiry date for all relevant rules to:

Task Configuration

Lubricate machine
Every Month : Set First Due on to *

Wipe down machine
Every Day : Set First Due on to *

When you press save, all of the new tasks will be updated and set active.

Once the task template has been configured, select "Save" and all of the new tasks will be updated and set active.

Select "Abort" and a Confirmation Modal opens, stating, "Are you sure you wish to abort this template configuration?"

Confirm

Are you sure you wish to abort this template configuration?

Select "Confirm" to return to the asset's Task Schedule Page without any changes made.

Task Schedule for Jump at it Cafe

Jump at it Cafe

Refresh Status Take out of service View Sub Components View Cost and Time

Meters
 Blade change (Blender) : 10 (2023-05-20 13:42:39)
 Test Motor (Blender) : 10 (2023-05-20 13:42:39)

Add Task Create Permissive Group Apply Task Template

Filters
 Search Tags
 Set Filter Clear

With Selected Show completed tasks Show generator tasks

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<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
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<input type="checkbox"/>	Sweep and Mop Floor (0) ✓	Regular		No	2025-09-23 10:21:27	Every Day (Next due on 2025-09-24)
<input type="checkbox"/>	Update Market prices (0) ✓	Regular		No	2025-09-23 10:21:50	Every Month (Next due on 2025-10-)
<input type="checkbox"/>	Wipe Counters (0) ✓	Regular		No	2023-06-30 11:53:07	Every Day (Overdue since 2023-07-)

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A user will still be required to establish meters, due dates, and meter readings for each individual task in the task template.

Apply Task Template ✕

This will copy the tasks from the selected template into the task schedule for Equipment.

You will be required to choose any meters and decide when the first due dates or meter readings are for every task.

Template * Inspecting machines for flaws/damage ▾

If a task with the same name and type exists * Do not copy the template task ▾

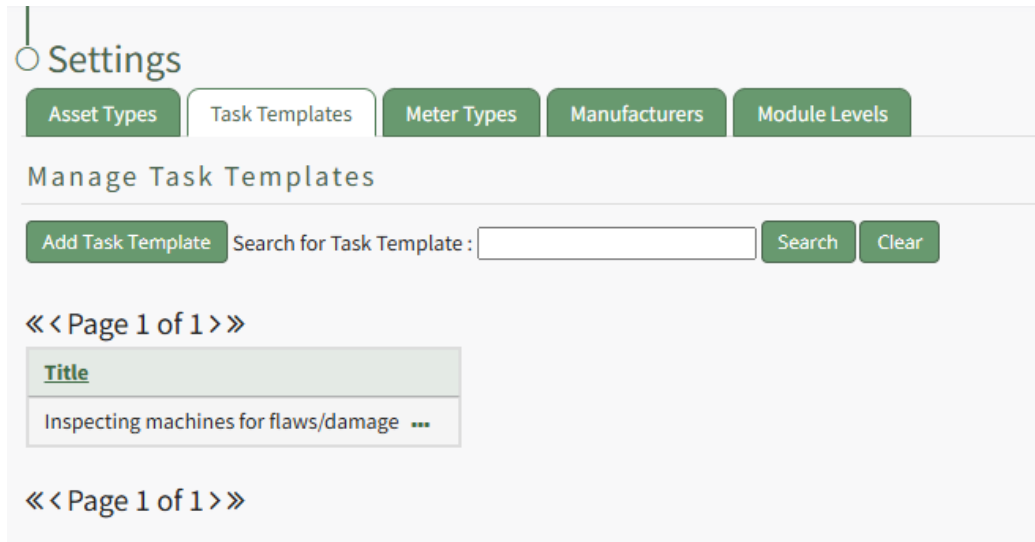
Continue Cancel

Select the template from the dropdown list that you wish to utilize.

New Task Templates can be created on the Task Template Tab on the Settings Page of the Assets Module.

How To: Create a New Task Schedule Template

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Settings

Asset Types Task Templates Meter Types Manufacturers Module Levels

Manage Task Templates

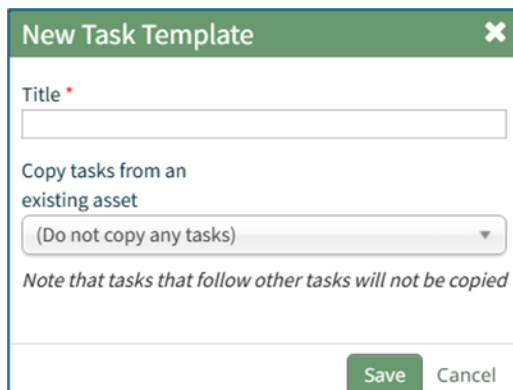
Add Task Template Search for Task Template: Search Clear

<< Page 1 of 1 >>

Title
Inspecting machines for flaws/damage ...

<< Page 1 of 1 >>

Click the “Add Task Template” button, opening the New Task Template modal.



New Task Template

Title *

Copy tasks from an existing asset

(Do not copy any tasks)

Note that tasks that follow other tasks will not be copied

Save Cancel

Input the desired Title for the new task template.

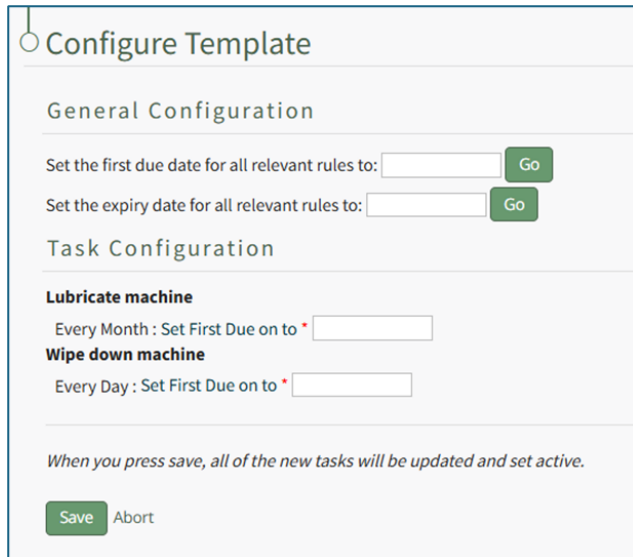
Select which asset or component whose task schedule you want to create the template from.

Click “Save” and the new task template will show in the Task Template Table.

Tasks that follow other tasks will not be copied into the Task Template.

A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the template task.

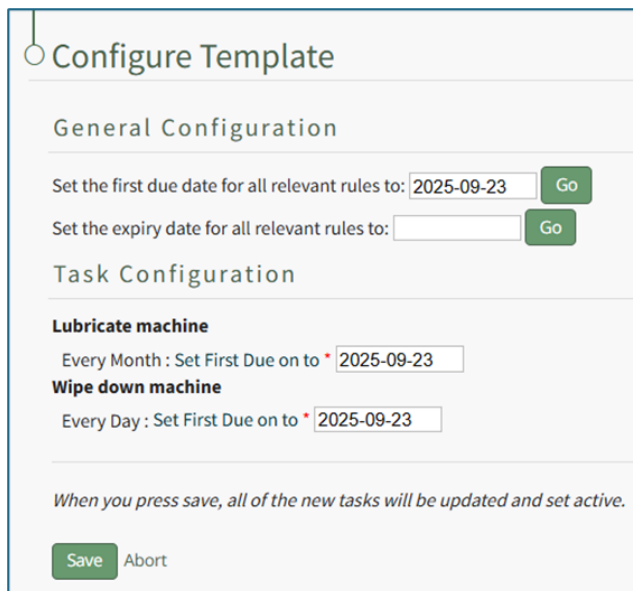
Select the “Continue” button, opening the Configure Template Page.



The screenshot shows the 'Configure Template' page with the following elements:

- General Configuration**
 - Set the first due date for all relevant rules to: **Go**
 - Set the expiry date for all relevant rules to: **Go**
- Task Configuration**
 - Lubricate machine**
 - Every Month : Set First Due on to *
 - Wipe down machine**
 - Every Day : Set First Due on to *
- When you press save, all of the new tasks will be updated and set active.
- Save** **Abort**

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.

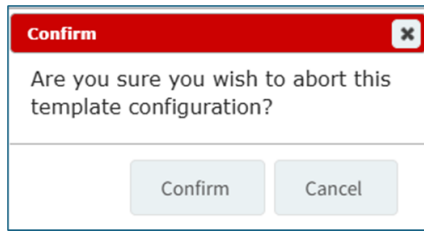


The screenshot shows the 'Configure Template' page with the following elements:

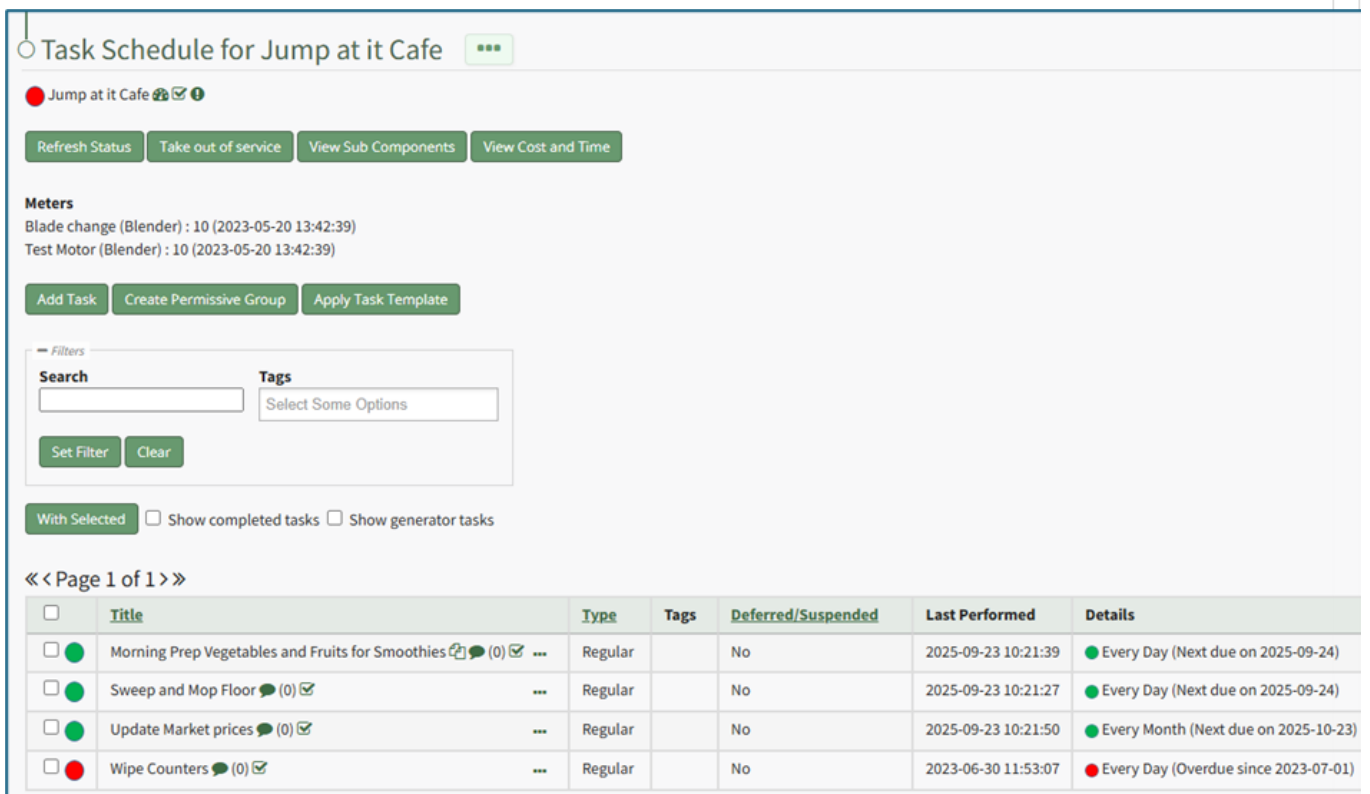
- General Configuration**
 - Set the first due date for all relevant rules to: **Go**
 - Set the expiry date for all relevant rules to: **Go**
- Task Configuration**
 - Lubricate machine**
 - Every Month : Set First Due on to *
 - Wipe down machine**
 - Every Day : Set First Due on to *
- When you press save, all of the new tasks will be updated and set active.
- Save** **Abort**

Once the task template has been configured, select “Save” and all of the new tasks will be updated and set active.

Select “Abort” and a Confirmation Modal opens, stating, “Are you sure you wish to abort this template configuration?”



Select “Confirm” to return to the asset's Task Schedule Page without any changes made.



The screenshot shows the "Task Schedule for Jump at it Cafe" interface. At the top, there's a header with the asset name and a menu icon. Below that are several action buttons: "Refresh Status", "Take out of service", "View Sub Components", and "View Cost and Time". A "Meters" section lists "Blade change (Blender) : 10 (2023-05-20 13:42:39)" and "Test Motor (Blender) : 10 (2023-05-20 13:42:39)". Below the meters are buttons for "Add Task", "Create Permissive Group", and "Apply Task Template". A "Filters" section includes a "Search" input, a "Tags" dropdown with "Select Some Options", and "Set Filter" and "Clear" buttons. There are also checkboxes for "With Selected", "Show completed tasks", and "Show generator tasks". At the bottom, there's a pagination control "« < Page 1 of 1 > »" and a table of tasks.

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	Morning Prep Vegetables and Fruits for Smoothies (0) ✓ ...	Regular		No	2025-09-23 10:21:39	● Every Day (Next due on 2025-09-24)
<input type="checkbox"/>	Sweep and Mop Floor (0) ✓ ...	Regular		No	2025-09-23 10:21:27	● Every Day (Next due on 2025-09-24)
<input type="checkbox"/>	Update Market prices (0) ✓ ...	Regular		No	2025-09-23 10:21:50	● Every Month (Next due on 2025-10-23)
<input type="checkbox"/>	Wipe Counters (0) ✓	Regular		No	2023-06-30 11:53:07	● Every Day (Overdue since 2023-07-01)

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Apply Task Template ✕

This will copy the tasks from the selected template into the task schedule for Equipment.

You will be required to choose any meters and decide when the first due dates or meter readings are for every task.

Template *

If a task with the same name and type exists *

Select the template from the dropdown list that you wish to utilize.

New Task Templates can be created on the Task Template Tab on the Settings Page of the Assets Module.

How To: Create a New Task Schedule Template

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Settings

Asset Types Task Templates Meter Types Manufacturers Module Levels

Manage Task Templates

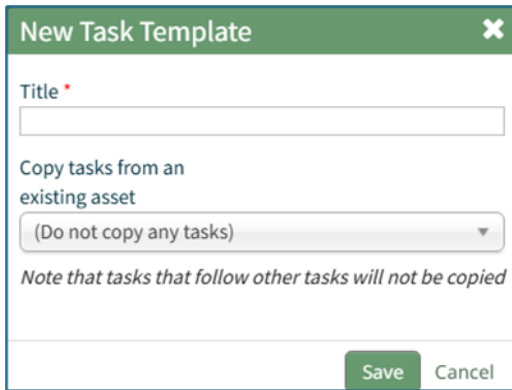
Search for Task Template:

« « Page 1 of 1 » »

Title
Inspecting machines for flaws/damage ...

« « Page 1 of 1 » »

Click the “Add Task Template” button, opening the New Task Template modal.



The image shows a dialog box titled "New Task Template" with a close button (X) in the top right corner. It contains a text input field for "Title" with a red asterisk indicating it is required. Below this is a dropdown menu labeled "Copy tasks from an existing asset" with the option "(Do not copy any tasks)" selected. A note below the dropdown states "Note that tasks that follow other tasks will not be copied". At the bottom of the dialog are two buttons: "Save" and "Cancel".

Input the desired Title for the new task template.

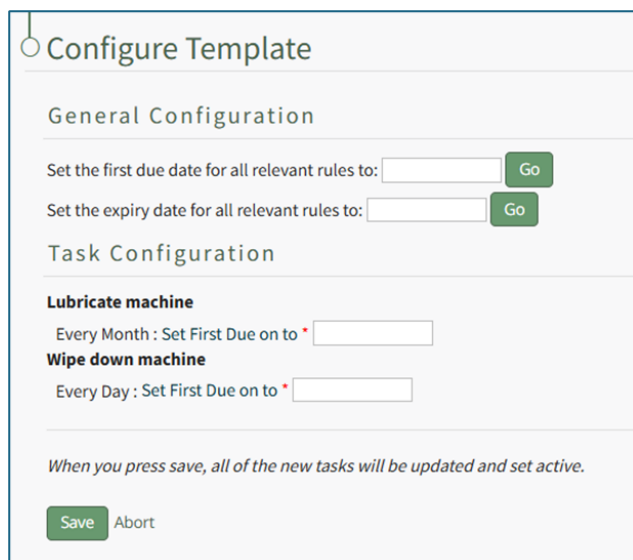
Select which asset or component whose task schedule you want to create the template from.

Click "Save" and the new task template will show in the Task Template Table.

Tasks that follow other tasks will not be copied into the Task Template.

A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the template task.

Select the "Continue" button, opening the Configure Template Page.



The image shows the "Configure Template" page. It has a header with a back arrow and the title "Configure Template". Below the header is a section titled "General Configuration" with two rows of input fields and "Go" buttons: "Set the first due date for all relevant rules to:" and "Set the expiry date for all relevant rules to:". Below this is a section titled "Task Configuration" with two sub-sections: "Lubricate machine" with "Every Month : Set First Due on to" and "Wipe down machine" with "Every Day : Set First Due on to". At the bottom of the page is a note: "When you press save, all of the new tasks will be updated and set active." and two buttons: "Save" and "Abort".

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.

Configure Template

General Configuration

Set the first due date for all relevant rules to:

Set the expiry date for all relevant rules to:

Task Configuration

Lubricate machine
Every Month : Set First Due on to *

Wipe down machine
Every Day : Set First Due on to *

When you press save, all of the new tasks will be updated and set active.

Once the task template has been configured, select “Save” and all of the new tasks will be updated and set active.

Select “Abort” and a Confirmation Modal opens, stating, “Are you sure you wish to abort this template configuration?”

Confirm

Are you sure you wish to abort this template configuration?

Select “Confirm” to return to the asset's Task Schedule Page without any changes made.

Task Schedule for Jump at it Cafe

Jump at it Cafe

Refresh Status Take out of service View Sub Components View Cost and Time

Meters
 Blade change (Blender) : 10 (2023-05-20 13:42:39)
 Test Motor (Blender) : 10 (2023-05-20 13:42:39)

Add Task Create Permissive Group Apply Task Template

Filters
 Search Tags
 Select Some Options
 Set Filter Clear

With Selected Show completed tasks Show generator tasks

<< Page 1 of 1 >>

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
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<input type="checkbox"/>	Sweep and Mop Floor (0) ✓	Regular		No	2025-09-23 10:21:27	Every Day (Next due on 2025-09-24)
<input type="checkbox"/>	Update Market prices (0) ✓	Regular		No	2025-09-23 10:21:50	Every Month (Next due on 2025-10-23)
<input type="checkbox"/>	Wipe Counters (0) ✓	Regular		No	2023-06-30 11:53:07	Every Day (Overdue since 2023-07-01)

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Template *

If a task with the same name and type exists *

Continue Cancel

Select the template from the dropdown list that you wish to utilize.

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Settings

Asset Types Task Templates Meter Types Manufacturers Module Levels

Manage Task Templates

Add Task Template Search for Task Template: Search Clear

« « Page 1 of 1 » »

Title
Inspecting machines for flaws/damage ...

« « Page 1 of 1 » »

Click the “Add Task Template” button, opening the New Task Template modal.

New Task Template

Title *

Copy tasks from an existing asset

(Do not copy any tasks)

Note that tasks that follow other tasks will not be copied

Save Cancel

Input the desired Title for the new task template.

Select which asset or component whose task schedule you want to create the template from.

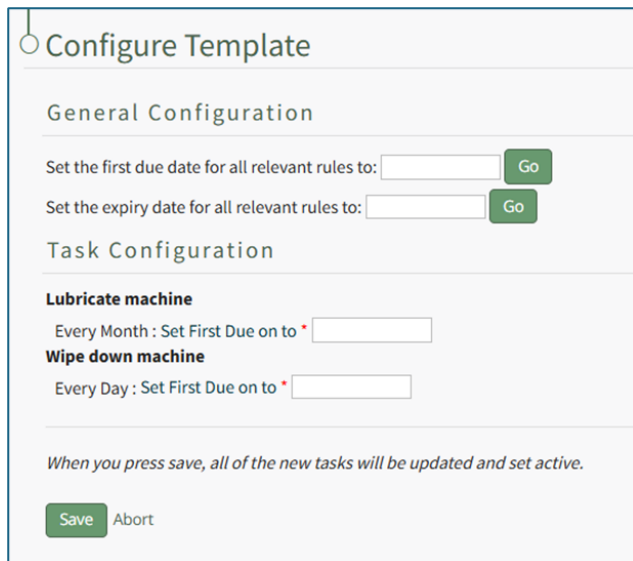
Click “Save” and the new task template will show in the Task Template Table.

Tasks that follow other tasks will not be copied into the Task Template.

A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the

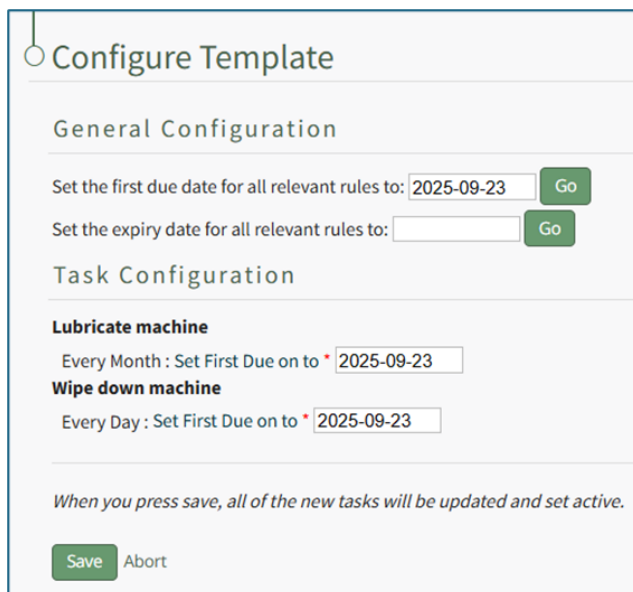
template task.

Select the "Continue" button, opening the Configure Template Page.



The screenshot shows the 'Configure Template' page. Under 'General Configuration', there are two input fields for dates, each with a 'Go' button to its right. Under 'Task Configuration', there are two sections: 'Lubricate machine' with an input field for 'Every Month : Set First Due on to' and 'Wipe down machine' with an input field for 'Every Day : Set First Due on to'. At the bottom, there is a 'Save' button and an 'Abort' button. A note at the bottom states: 'When you press save, all of the new tasks will be updated and set active.'

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.



The screenshot shows the 'Configure Template' page after the first date has been entered. The first input field under 'General Configuration' now contains the date '2025-09-23'. The 'Go' button next to it is highlighted. The input fields under 'Task Configuration' now also contain the date '2025-09-23'. The 'Save' and 'Abort' buttons remain at the bottom.

Once the task template has been configured, select "Save" and all of the new tasks will be updated and set active.

Select "Abort" and a Confirmation Modal opens, stating, "Are you sure you wish to abort this template configuration?"

Confirm
✕

Are you sure you wish to abort this template configuration?

Confirm
Cancel

Select “Confirm” to return to the asset's Task Schedule Page without any changes made.

Task Schedule for Jump at it Cafe
⋮

● Jump at it Cafe 🔒📄🔔

Refresh Status
Take out of service
View Sub Components
View Cost and Time

Meters

Blade change (Blender) : 10 (2023-05-20 13:42:39)

Test Motor (Blender) : 10 (2023-05-20 13:42:39)

Add Task
Create Permissive Group
Apply Task Template

Filters

Search

Set Filter
Clear

Tags

Select Some Options

With Selected
 Show completed tasks
 Show generator tasks

« < Page 1 of 1 > »

<input type="checkbox"/>	Title	Type	Tags	Deferred/Suspended	Last Performed	Details
<input type="checkbox"/>	Morning Prep Vegetables and Fruits for Smoothies 🔒📄🔔 (0) ☑️ ⋮	Regular		No	2025-09-23 10:21:39	● Every Day (Next due on 2025-09-24)
<input type="checkbox"/>	Sweep and Mop Floor 📄🔔 (0) ☑️	Regular		No	2025-09-23 10:21:27	● Every Day (Next due on 2025-09-24)
<input type="checkbox"/>	Update Market prices 📄🔔 (0) ☑️	Regular		No	2025-09-23 10:21:50	● Every Month (Next due on 2025-10-23)
<input type="checkbox"/>	Wipe Counters 📄🔔 (0) ☑️	Regular		No	2023-06-30 11:53:07	● Every Day (Overdue since 2023-07-01)

Selecting the “Apply Task Template” button opens the Apply Task Template Modal that allows the user to copy tasks from a template into the task schedule for an asset or its components. This feature allows a user to utilize bulk task schedule creation if they have to track several assets that share identical task schedules.

A user will still be required to establish meters, due dates, and meter readings for each individual task in the task template.

Apply Task Template
✕

This will copy the tasks from the selected template into the task schedule for Equipment.

You will be required to choose any meters and decide when the first due dates or meter readings are for every task.

Template * Inspecting machines for flaws/damage ▾

If a task with the same name and type exists * Do not copy the template task ▾

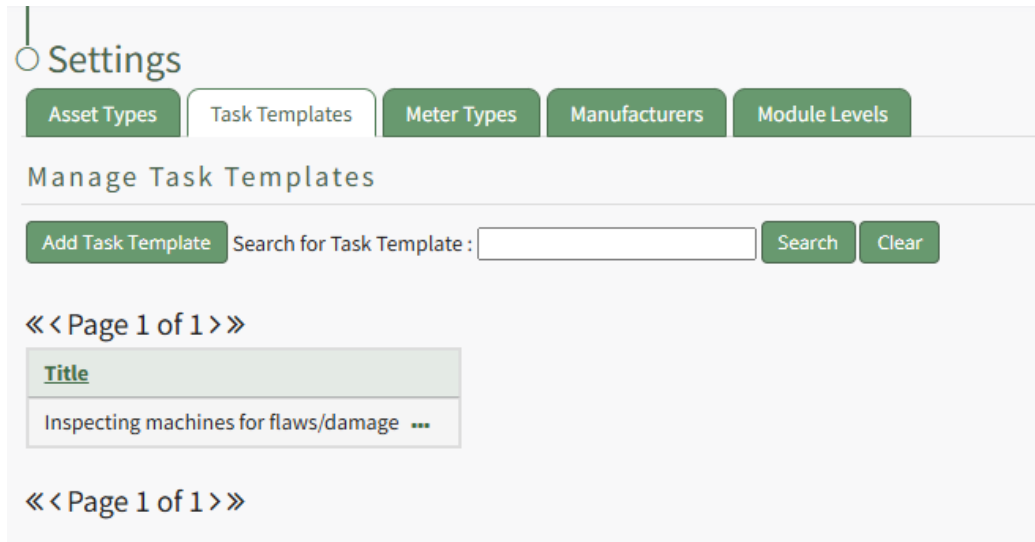
Continue
Cancel

Select the template from the dropdown list that you wish to utilize.

New Task Templates can be created on the Task Template Tab on the Settings Page of the Assets Module.

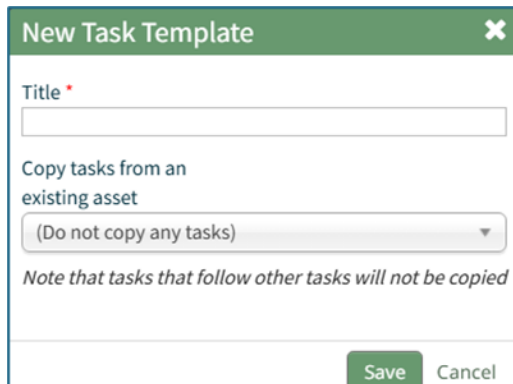
How To: Create a New Task Schedule Template

To create a new task schedule template, open the Task Template Tab on the Settings Page in the Assets Module.



The screenshot shows the 'Settings' page with the 'Task Templates' tab selected. Below the navigation tabs, there is a section titled 'Manage Task Templates'. It includes an 'Add Task Template' button, a search input field with the placeholder text 'Search for Task Template:', and 'Search' and 'Clear' buttons. Below the search area, there are navigation arrows '« < Page 1 of 1 > »'. A table with one row is visible, with a header 'Title' and a cell containing 'Inspecting machines for flaws/damage ...'. At the bottom, there are more navigation arrows '« < Page 1 of 1 > »'.

Click the “Add Task Template” button, opening the New Task Template modal.



The screenshot shows the 'New Task Template' modal. It has a title bar with a close button. The form contains a 'Title' field with a red asterisk, a dropdown menu for 'Copy tasks from an existing asset' with the selected option '(Do not copy any tasks)', and a note: 'Note that tasks that follow other tasks will not be copied'. At the bottom, there are 'Save' and 'Cancel' buttons.

Input the desired Title for the new task template.

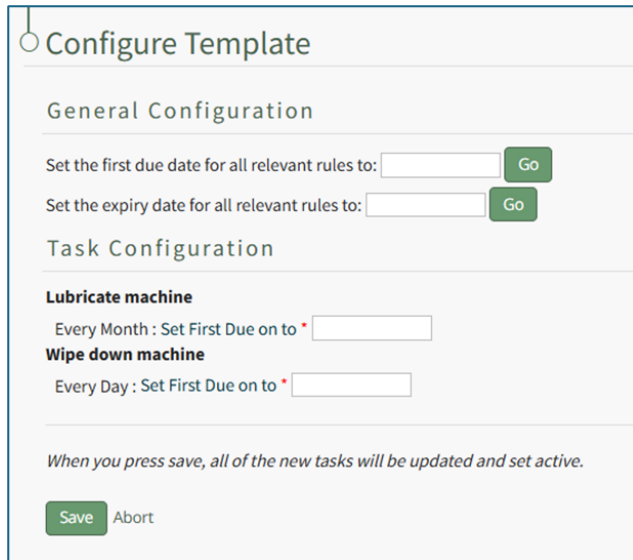
Select which asset or component whose task schedule you want to create the template from.

Click “Save” and the new task template will show in the Task Template Table.

Tasks that follow other tasks will not be copied into the Task Template.

A dropdown menu provides allows the user to select what the system should do if a task with the same name and type exists. Options include: Do Not Copy the Template Task (in order to maintain the pre-existing task), Copy the Template Tasks, or Replace the existing task with the template task.

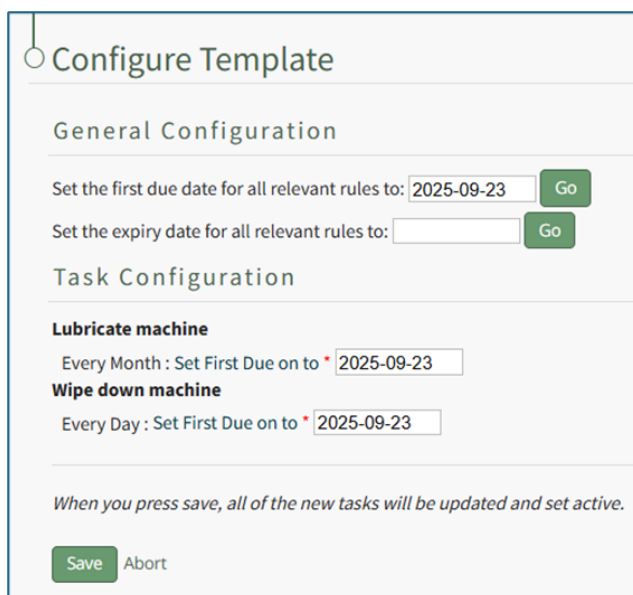
Select the “Continue” button, opening the Configure Template Page.



The screenshot shows the 'Configure Template' page with the following elements:

- General Configuration**
 - Set the first due date for all relevant rules to: **Go**
 - Set the expiry date for all relevant rules to: **Go**
- Task Configuration**
 - Lubricate machine**
 - Every Month : Set First Due on to *
 - Wipe down machine**
 - Every Day : Set First Due on to *
- When you press save, all of the new tasks will be updated and set active.
- Save** **Abort**

Input the first due date for all relevant rules under General Configuration. Select the "Go" button to the right. The system will automatically input the dates for the Task Configuration.

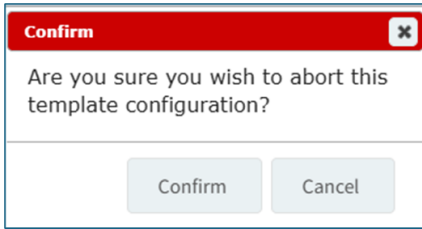


The screenshot shows the 'Configure Template' page with the following elements:

- General Configuration**
 - Set the first due date for all relevant rules to: **Go**
 - Set the expiry date for all relevant rules to: **Go**
- Task Configuration**
 - Lubricate machine**
 - Every Month : Set First Due on to *
 - Wipe down machine**
 - Every Day : Set First Due on to *
- When you press save, all of the new tasks will be updated and set active.
- Save** **Abort**

Once the task template has been configured, select “Save” and all of the new tasks will be updated and set active.

Select “Abort” and a Confirmation Modal opens, stating, “Are you sure you wish to abort this template configuration?”



Select "Confirm" to return to the asset's Task Schedule Page without any changes made.

Revision #3

Created 2025-12-07 20:22:30 UTC by Mitzi Orkus

Updated 2026-01-23 01:28:24 UTC by Mitzi Orkus