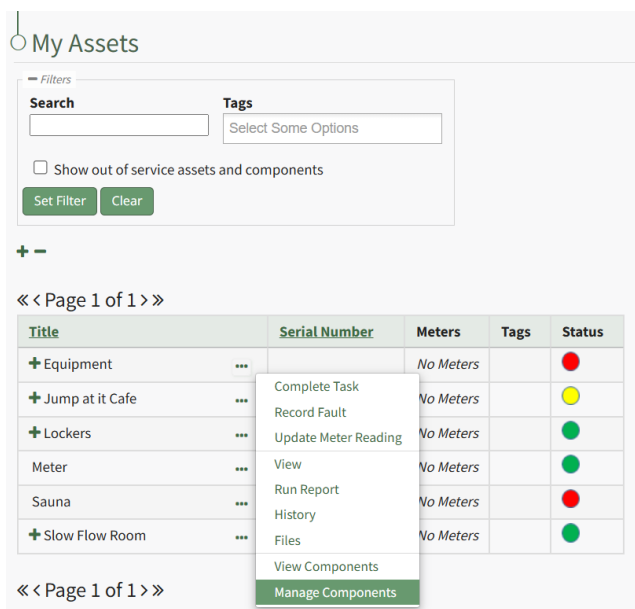


Create a New Task on a Task Schedule

To create a new task for a specific asset, open the Task Schedule Page of the relevant asset.

How To: View an Asset's Task Schedule

To view an asset's task schedule, open the Manage Assets Page in the Assets Module on the Main Menu. Use filters as needed and identify the asset/component whose task schedule you wish to view. Click the three-dot icon to the right of the asset title opening the Asset Management Context Menu.



The screenshot shows the 'My Assets' interface. At the top, there are search and filter options. Below that is a table of assets. The table has columns for Title, Serial Number, Meters, Tags, and Status. A context menu is open over the 'Jump at it Cafe' row, showing various actions. The 'Manage Components' option is highlighted.

Title	Serial Number	Meters	Tags	Status
+ Equipment	...	No Meters		Red
+ Jump at it Cafe	...	No Meters		Yellow
+ Lockers	...	No Meters		Green
Meter	...	No Meters		Green
Sauna	...	No Meters		Red
+ Slow Flow Room	...	No Meters		Green

Select the "Manage Components" option, opening the Manage Asset Components Page. Select the three-dot icon to the right of the asset/component you wish to add interim notes to and select Task Schedule from the context menu.

Task Schedule for Equipment

Equipment

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

Meters

No Meters

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
<input type="checkbox"/>	Inspect all joints for appropriate tightness (0) ✓ ...	Regular		No	2026-01-14 12:09:58	● Ad Hoc (No triggers have been defined)
<input type="checkbox"/>	Oil joints (0) ✓ ...	Regular		No	2026-01-14 12:09:58	● Ad Hoc (No triggers have been defined)

<< Page 1 of 1 >>

Select the "Add Task" button opening the New Task Modal.

New Task

Name

Tags

Type

Triggers

Can be performed by

Always show on Assets home

Hide "Notes from Task" when completing this task

When performing a task

Cost (USD)

Duration (hours)

Additional information

Save Cancel

Input the Task Name and any tags you want to be associated with the task.

Select the Task Type and the Trigger Behavior from the dropdown menu. A detailed explanation of Task Trigger Settings has been included in the user manual.

Use the Customized Trigger Settings How To Links in the table below for ease in completing this modal when you select the plus sign icon to the right of the Trigger Behaviors dropdown menu.

Customized Trigger Settings How To Links Table

Customize Trigger Settings with a One Time Period
Customize Trigger Settings with a Generate Every Period
Customize Trigger Settings with an Every (strict) Period
Customize Trigger Settings with a Generate Every Period
Customize Trigger Settings Based on an On Expiry Period
Customize Trigger Settings Based on Pre-Existing Tasks

Clicking the field beneath "Can be Performed by" opens a dropdown menu. The option "All assigned" allows any user assigned the asset the ability to complete the specific task. Individual users assigned the asset can be individually assigned to the new task.

Click the "Always show on Assets Home" checkbox if you would like this task to show on the Upcoming Task Table, regardless of the status.

Click the "Hide 'Notes from Task' when completing this task" checkbox if you want to hide notes regarding this task when logging the task as complete.

Clicking the field beneath "When performing a task" opens a dropdown menu with options to require a file upload when a task is completed and/or require a meter reading when a task is completed. All meters associated with the asset will be listed individually on the dropdown menu.

Inputting a Cost and Duration (time in hours) associated with a task allows the system to generate Cost/Time Summaries for an asset and its components. Additional information regarding the task can be included in the final textbox.

Select "Save" after inputting the task details.

Task Schedule for

Task has been saved.

Jump at it Cafe

- Refresh Status
- Take out of service
- View 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
<input type="checkbox"/>	Empty Trash Recepticals (0) ✓	Regular		No	Never	Ad Hoc (No triggers have been defined)
<input type="checkbox"/>	Morning Prep Vegetables and Fruits for Smoothies (0) ✓	Regular		No	2026-01-15 15:56:52	Every Day (Next due on 2026-01-17)
<input type="checkbox"/>	Sweep and Mop Floor (0) ✓	Regular		No	2026-01-12 14:31:59	Every Day (Overdue since 2026-01-14)
<input type="checkbox"/>	Update Market prices (0) ✓	Regular		No	2026-01-12 14:31:59	Every Month (Next due on 2026-02-13)
<input type="checkbox"/>	Wipe Counters (0) ✓	Regular		No	2026-01-15 15:57:17	Every Day (Next due on 2026-01-17)

A popup confirms that the task has been saved. It now shows on the asset's Task Schedule Table.

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