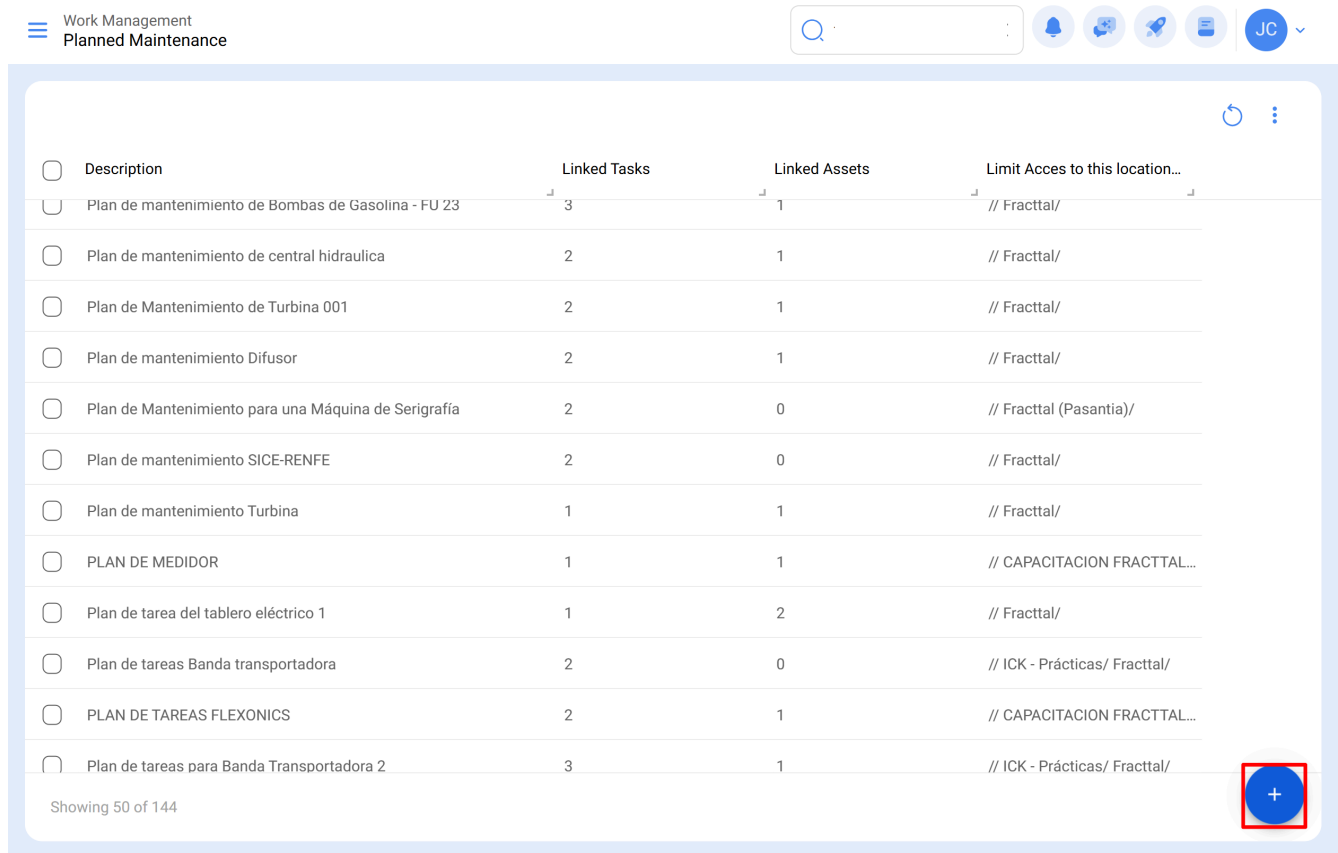


# How to add a maintenance task plan?

[help.fracttal.com/hc/en-us/articles/25222727003533-How-to-add-a-maintenance-task-plan](https://help.fracttal.com/hc/en-us/articles/25222727003533-How-to-add-a-maintenance-task-plan)

From the dashboard view, access the **Work Management** module in the main menu and select the **Planned Maintenance** section.

To add a new [task plan](#), click on the action symbol in the bottom right-hand corner of the screen.



The screenshot shows the 'Planned Maintenance' section of the Fracttal Work Management module. The interface includes a search bar, a user profile (JC), and a table of maintenance plans. The table has the following columns: Description, Linked Tasks, Linked Assets, and Limit Access to this location... The table contains 14 rows of data. A blue plus sign icon in a red square is highlighted in the bottom right corner of the table area.

Description	Linked Tasks	Linked Assets	Limit Access to this location...
Plan de mantenimiento de Bombas de Gasolina - FU 23	3	1	// Fracttal/
Plan de mantenimiento de central hidraulica	2	1	// Fracttal/
Plan de Mantenimiento de Turbina 001	2	1	// Fracttal/
Plan de mantenimiento Difusor	2	1	// Fracttal/
Plan de Mantenimiento para una Máquina de Serigrafía	2	0	// Fracttal (Pasantia)/
Plan de mantenimiento SICE-RENFE	2	0	// Fracttal/
Plan de mantenimiento Turbina	1	1	// Fracttal/
PLAN DE MEDIDOR	1	1	// CAPACITACION FRACTTAL...
Plan de tarea del tablero eléctrico 1	1	2	// Fracttal/
Plan de tareas Banda transportadora	2	0	// ICK - Prácticas/ Fracttal/
PLAN DE TAREAS FLEXONICS	2	1	// CAPACITACION FRACTTAL...
Plan de tareas para Banda Transportadora 2	3	1	// ICK - Prácticas/ Fracttal/

Showing 50 of 144

Clicking will open a new window where you must upload the information corresponding to the task plan you want to add, according to the following steps:

## Step 1:

Add the general information corresponding to the task plan and click save.

Required Information

- Description can't be blank

General

Task Plans

Assets Linked

Description

Limit Access to this location

Linked Tasks

0

Assets Linked

0

Save

The information requested is as follows:

- **Description:** Name describing the task plan.
- **Limit access** to this location: Location where the task plan is located, taking into account the hierarchy this represents for viewing said plan in relation to other users.
- **Associated tasks:** Number of tasks contained in the plan (this information will be displayed automatically when you complete step 2).
- **Linked assets:** Number of assets associated with the task plan (this information will be displayed automatically when you complete step 3).

## Step 2:

In this step you must add all the information corresponding to each of the maintenance tasks associated with the plan, identifying the general information for each task, as well as its respective subtasks, iterations, resources and attachments.

The screenshot shows a task creation interface. On the left, there is a sidebar with a 'Required Information' section containing a warning icon and the text 'Description can't be blank'. Below this are three tabs: 'General' (selected), 'Task Plans', and 'Assets Linked'. The main content area contains a form with four fields: 'Description' (highlighted with a red box), 'Limit Access to this location' (a dropdown menu), 'Linked Tasks' (displaying '0'), and 'Assets Linked' (displaying '0'). A 'Save' button is located in the top right corner of the form area.

Next, each of the fields that make up the information tabs on the tasks when they are added to the plan will be described:

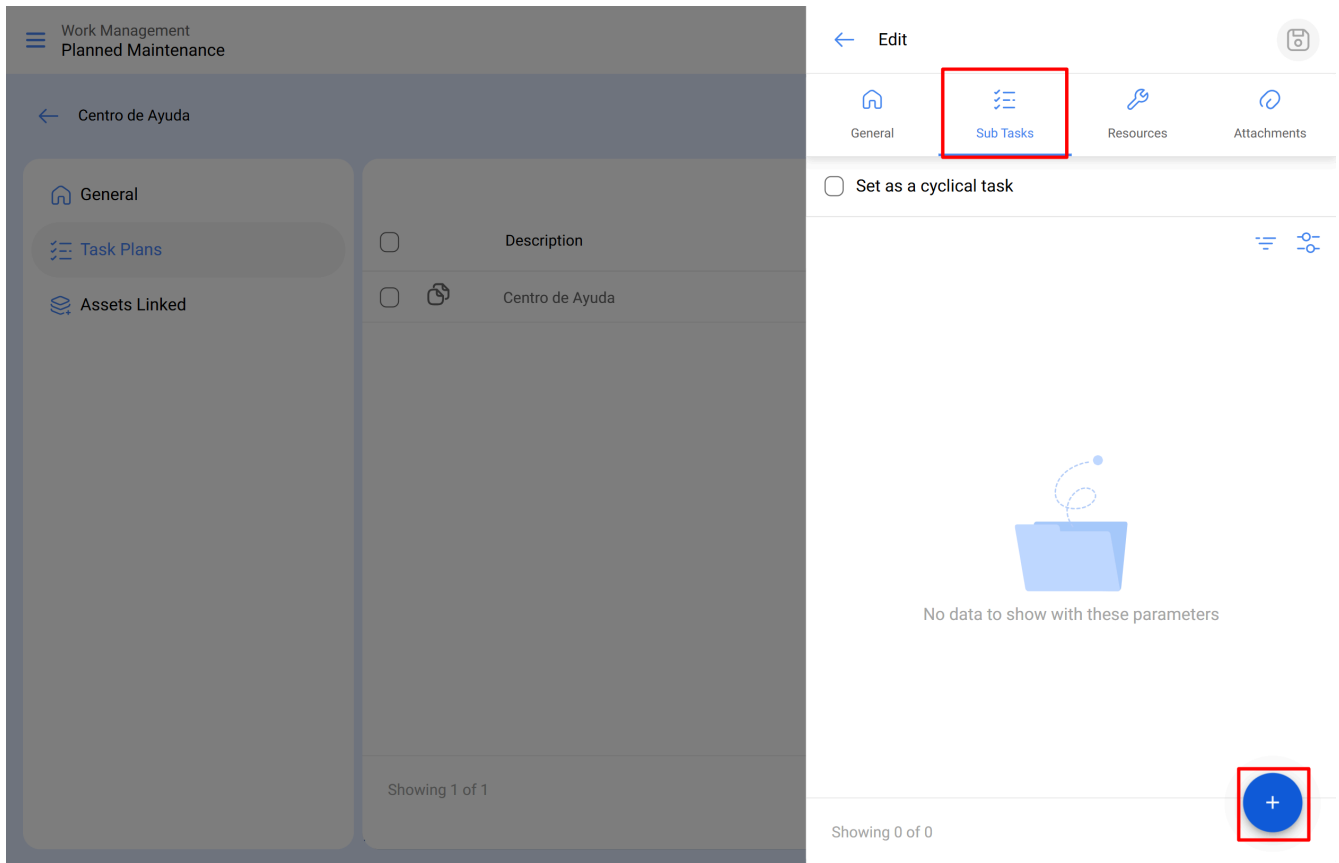
# General:

The screenshot shows the 'New Task' form in the Work Management Planned Maintenance system. The form is divided into a left sidebar and a main content area. The sidebar contains 'General', 'Task Plans', and 'Assets Linked'. The main content area is titled 'New Task' and has a red border. It contains several input fields: 'Description' (with a red error message 'Description is too short (the minimum is 3 characters)'), 'Task type' (with a red error message 'Task type is too short (the minimum is 2 characters)'), 'Group 1', 'Group 2', 'Priority' (set to 'Medium'), 'Estimated Duration' (000:10), and 'Asset Downtime' (000:00). A 'Triggers' section is at the bottom with a blue plus icon.

- **Description:** Short details where the task in question is specified.
- **Task type:** Catalog with all the task types registered in the system.
- **Classification 1 and 2:** Corresponds to the free fields left by the platform to complete and give the task a classification.
- **Priority:** List where the task is classified according to its priority.
- **Estimated duration:** Time it would take to perform the task (actual time is recorded directly in the OS).
- **Maintenance downtime:** Estimated time that the downtime asset would last while the activity is running (actual time is recorded directly in the OS).
- **Triggers:** Corresponds to the activation mode of the task, which can be of 4 types (by date, when, each and by event).

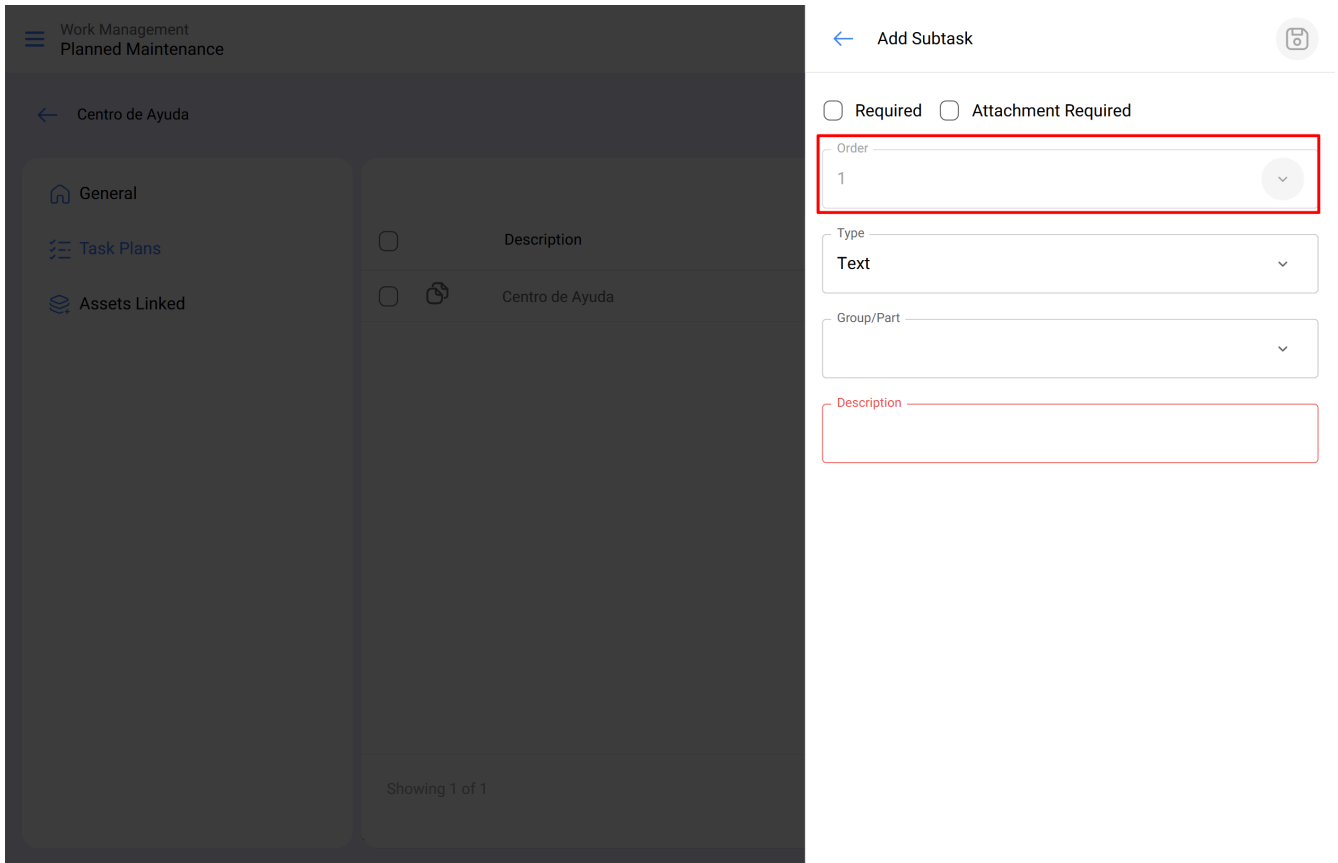
## Subtasks:

Subtasks are the step-by-step or checklist of activities that you want to record or validate when completing a task. To add subtasks, you must complete the following fields



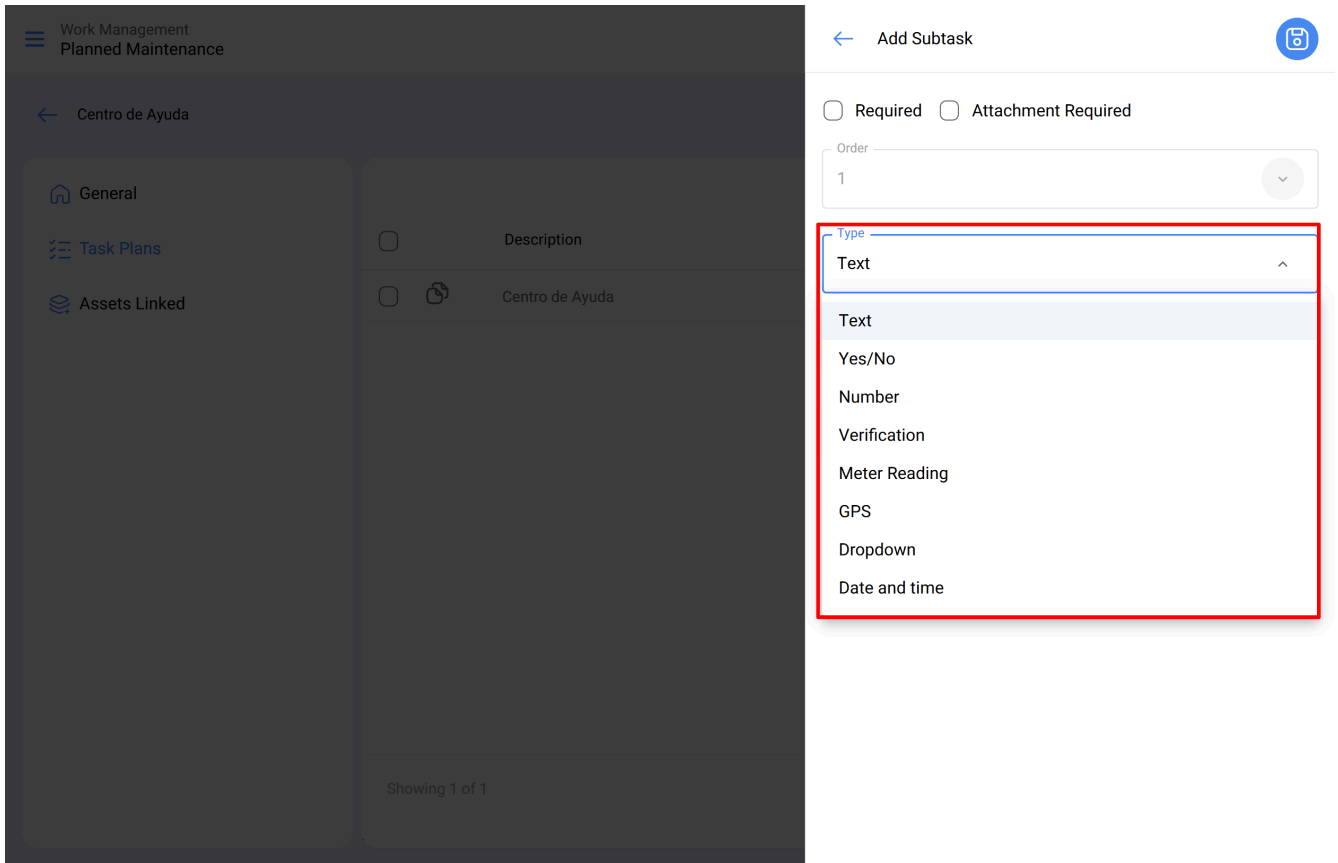
## Order:

Sequence of sorting subtasks



## Type:

Predefined list with the types of subtasks the system has (Text, Yes/No, Number, Check, Meter reading, GPS location, List and date/time). Depending on the type of subtasks, you can have open or closed answers as the case may be.



## Group/Part:

Catalog where you can stipulate the groups or parts to which the subtask in question belongs.

Work Management  
Planned Maintenance

Centro de Ayuda

General

Task Plans

Assets Linked

Description
Centro de Ayuda

Showing 1 of 1

← Add Subtask

Required  Attachment Required

Order  
1

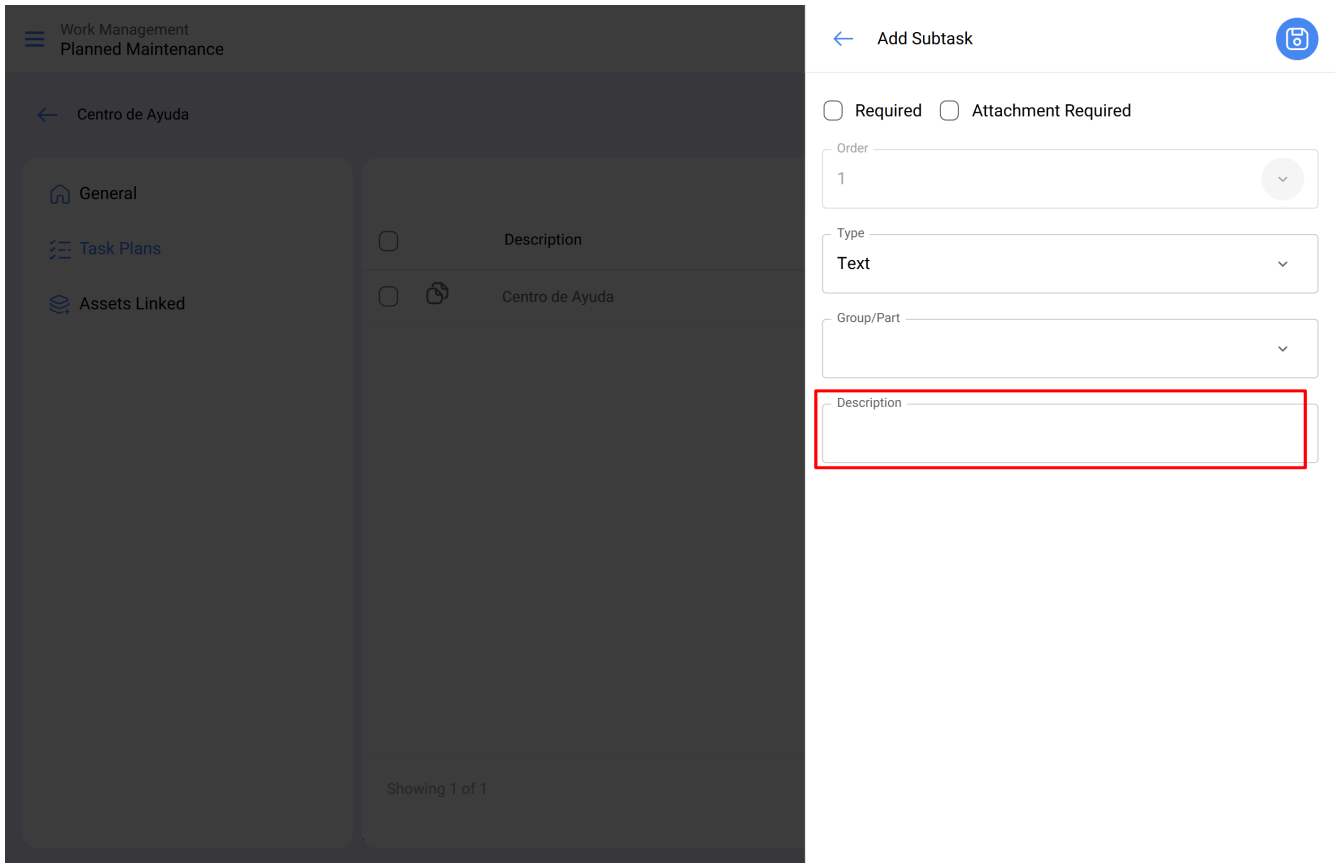
Type  
Text

Group/Part

Description  
prueba

## Description:

Full detail describing the activity.



## Required:

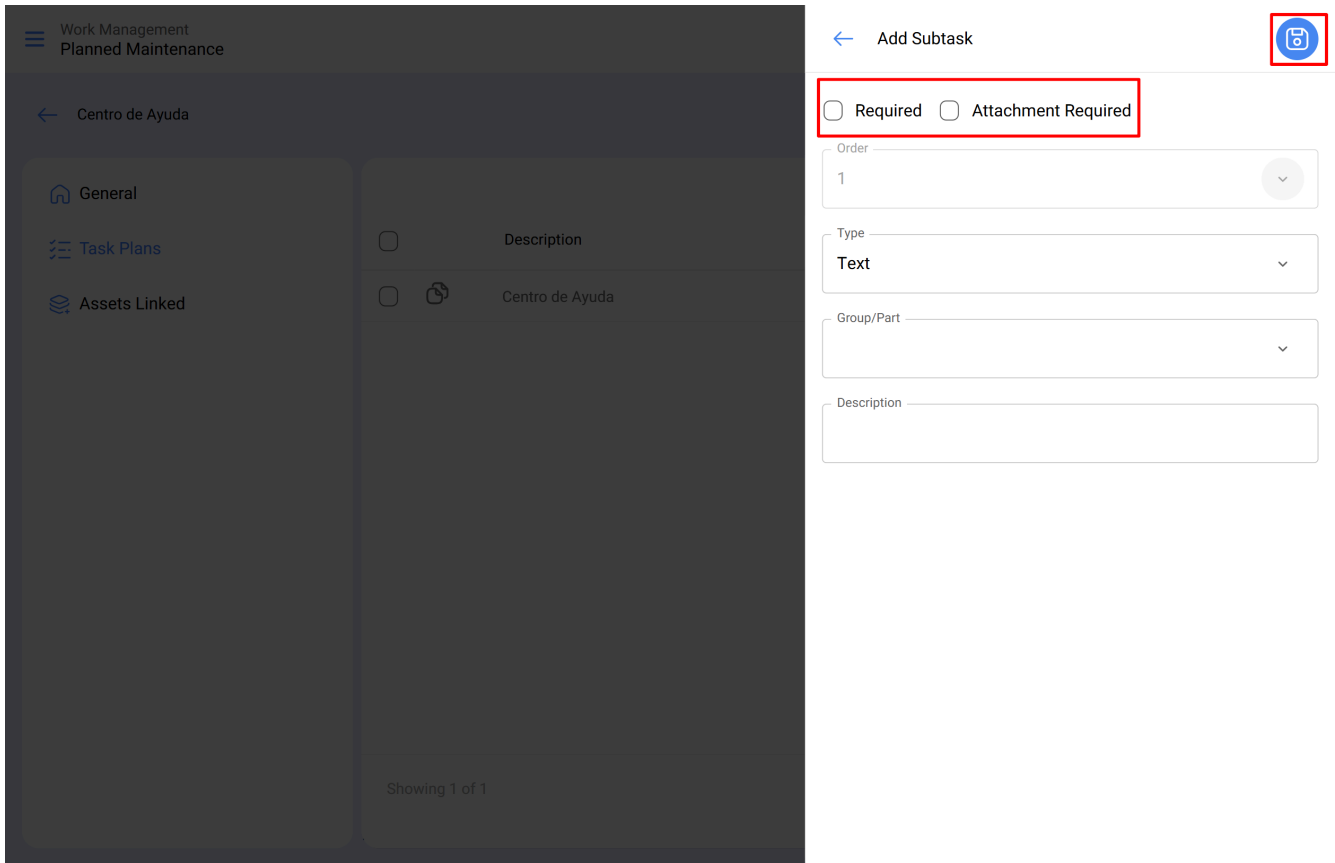
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Option that allows you to set the subtask as mandatory (you can't complete it if the subtasks that have this option enabled have not been completed).

## Attachment Required:

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Option that allows you to set mandatory the need to add an attachment associated with the subtask (you cannot complete the fill-in if the attachment has not been added).



## Iterations:

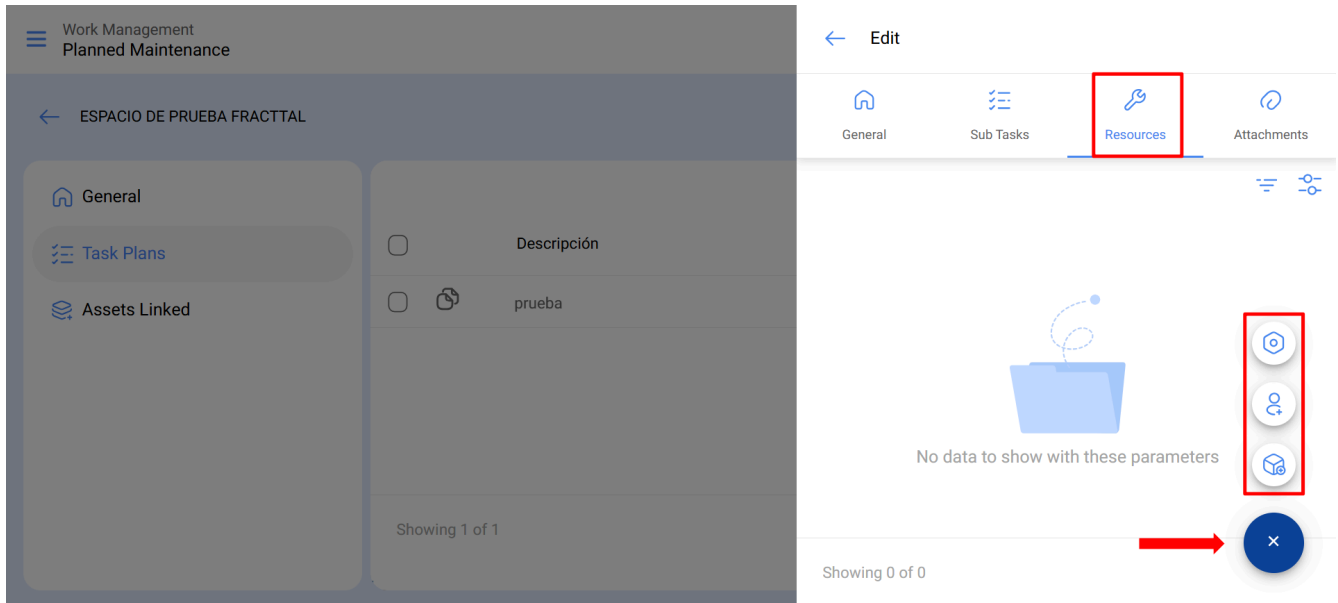
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This is a function that allows you to independently establish which sub-tasks will be carried out at each activation, as well as the number of iterations that represent each execution cycle, thus obtaining better control over sub-tasks and avoiding overlapping activities. It is generally used in nested maintenance, such as that carried out on assets, depending on mileage or hours of use.

## Resources:

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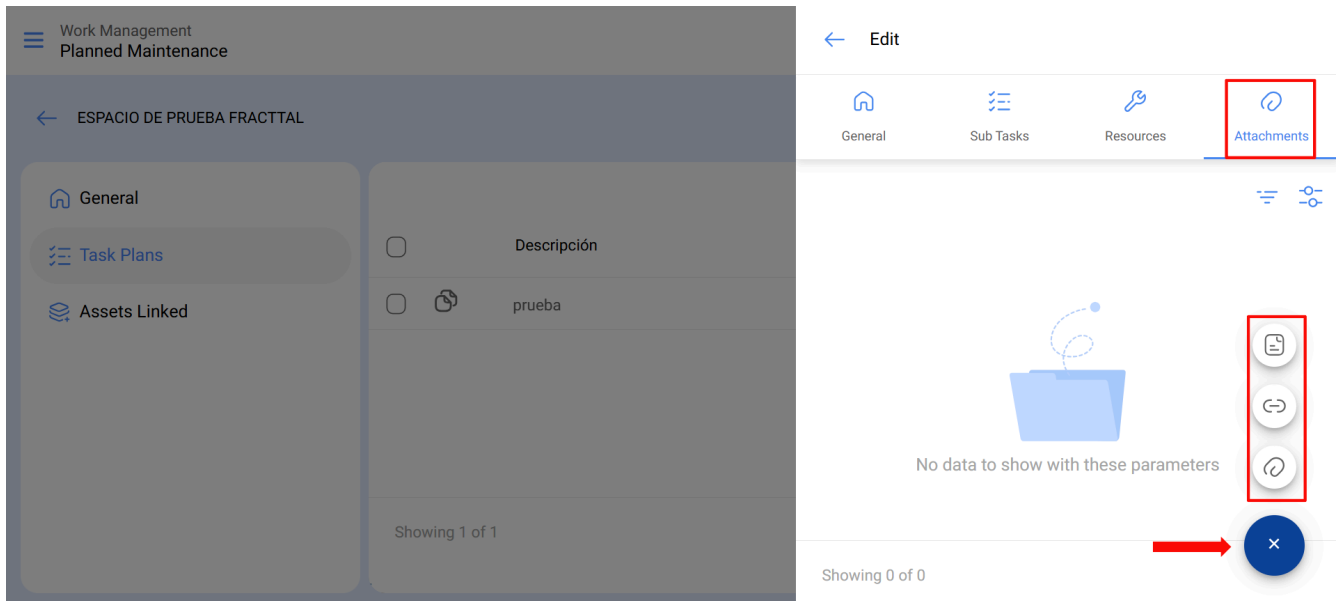
Resources can be added to tasks so that they are added each time that task is activated and are reflected in both the values to be used and the costs of the OS's. To do this, simply add the resources, which can be of the following classes:



- **Human resources:** Personnel who will take part in carrying out the activities and therefore their hourly costs are accounted for within the OS.
- **services:** External services carried out by third parties (must be added beforehand in the third-party module).
- **Stocks:** Resources such as tools or spare parts and supplies that come from a warehouse.

## Attachments:

As with resources, attachments can be added to tasks so that they are added each time the task is activated in an OS. To do this, there are different types of attachments that can be added and they are of the following classes:



- **Note:** Corresponds to a field for adding a text note.
- **Link:** Direct links to web pages.
- **Files:** Corresponds to documents and images.

Finally, once all the necessary fields have been uploaded to complete the previous steps and saved, the plan will be created detailing all the maintenance tasks involved, with only the assets associated with the plan remaining to be linked.

### Step 3:

Once the plan has been created along with its respective tasks (steps 1 and 2), the assets that will be governed by this task plan for carrying out maintenance activities must be linked. To do this, you have to click on the add symbol to open a new window where all the assets that can be linked to the task plan will be displayed.

← Centro de Ayuda Save

General

Task Plans

**Assets Linked**

No data to show with these parameters

Showing 0 of 0 +

Work Management  
Planned Maintenance

← Centro de Ayuda

General

Task Plans

Assets Linked

Search by Assets

Type: Locations  
Code:  
Priority:  
Location:

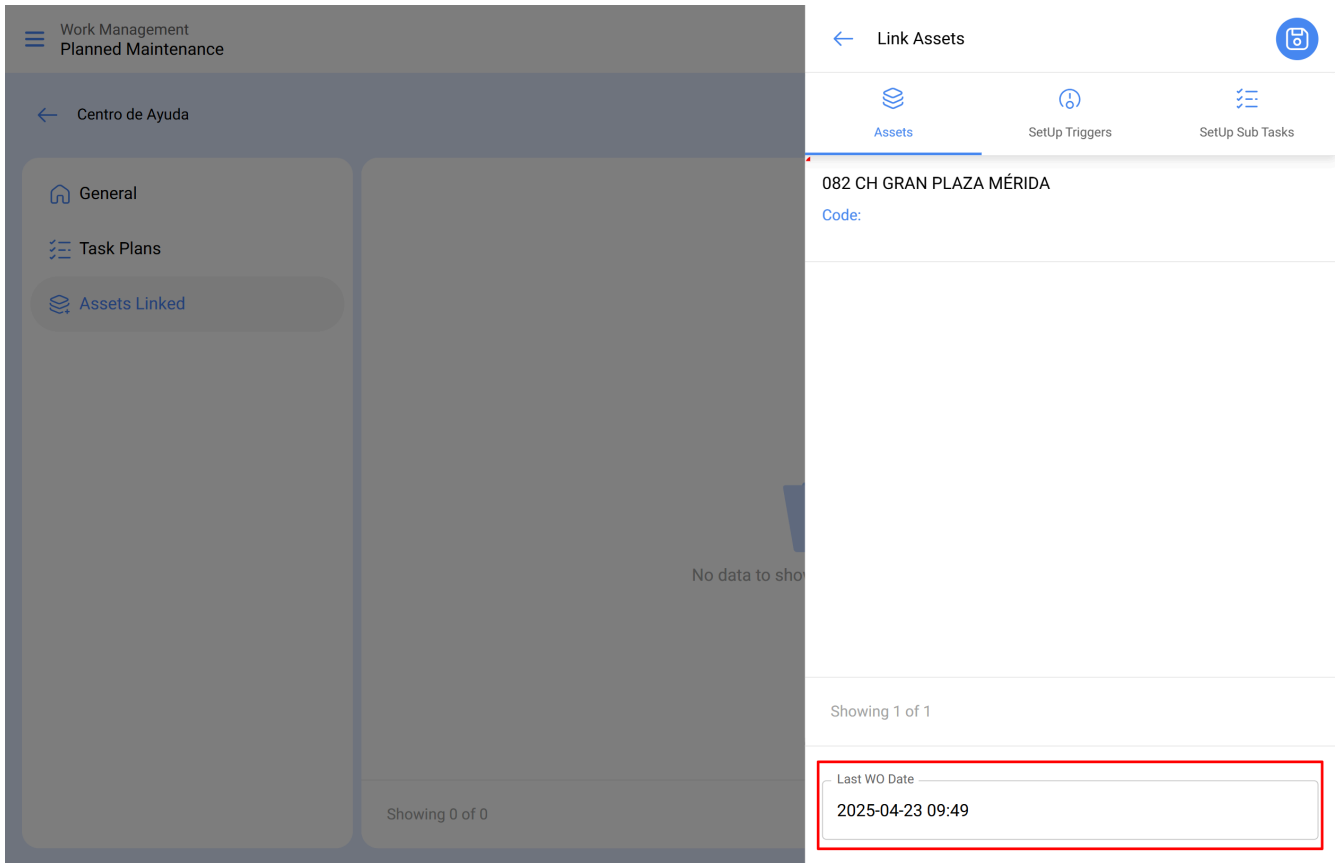
012 CH PLAZA DEL SOL

Type: Locations  
Code:  
Priority:  
Location:

No data to show

Showing 25 of 11558

Once the asset has been selected, the date of the last job must be set so that the system can calculate and schedule the next maintenance with triggers by date.



It is important to note that the date entered is a global activation date for all the tasks in the plan. However, it may happen that the dates of the last maintenance were not carried out on the same occasion or do not necessarily coincide, in which case the dates of the last jobs must be set for each of the tasks individually. (For more information, see the section ["How do I set the date of the last maintenance for triggers by date?"](#)).

Then, in a similar way, the gauges associated with the triggers or subtasks in the plan must be configured. (For more information, see the section ["How to link meters to a planned maintenance?"](#)).

Finally, once the three previous steps have been completed, the task plan will be established and all the assets linked to that plan, for the execution and management of the tasks.