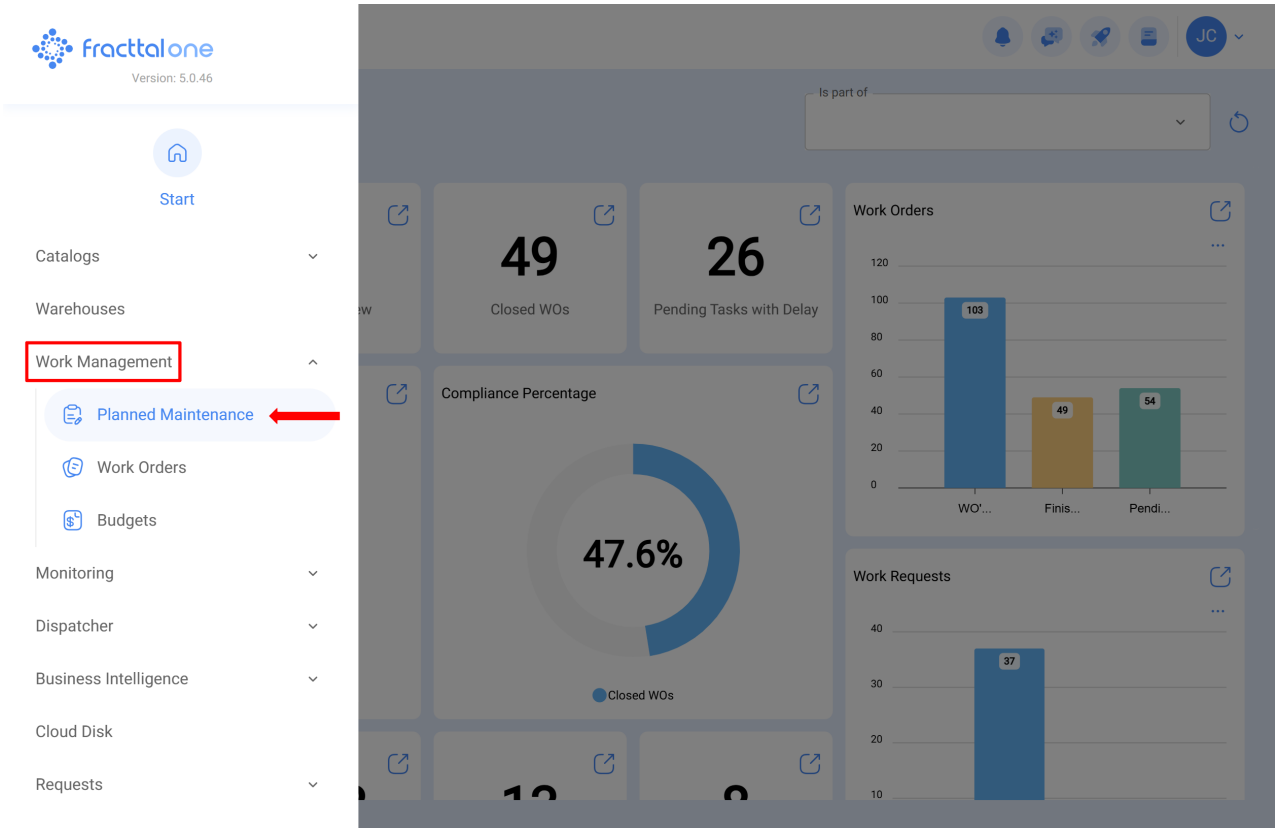
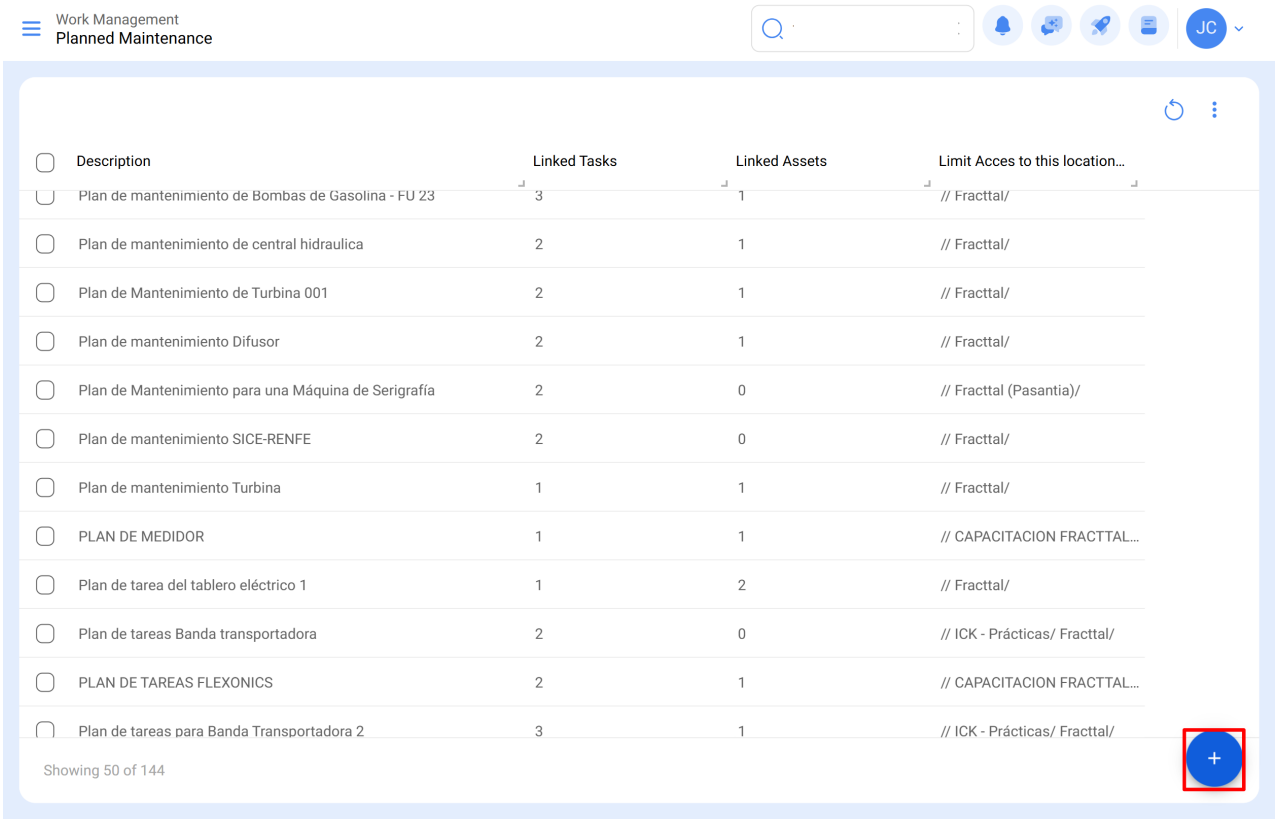
How to add a maintenance task plan?

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.

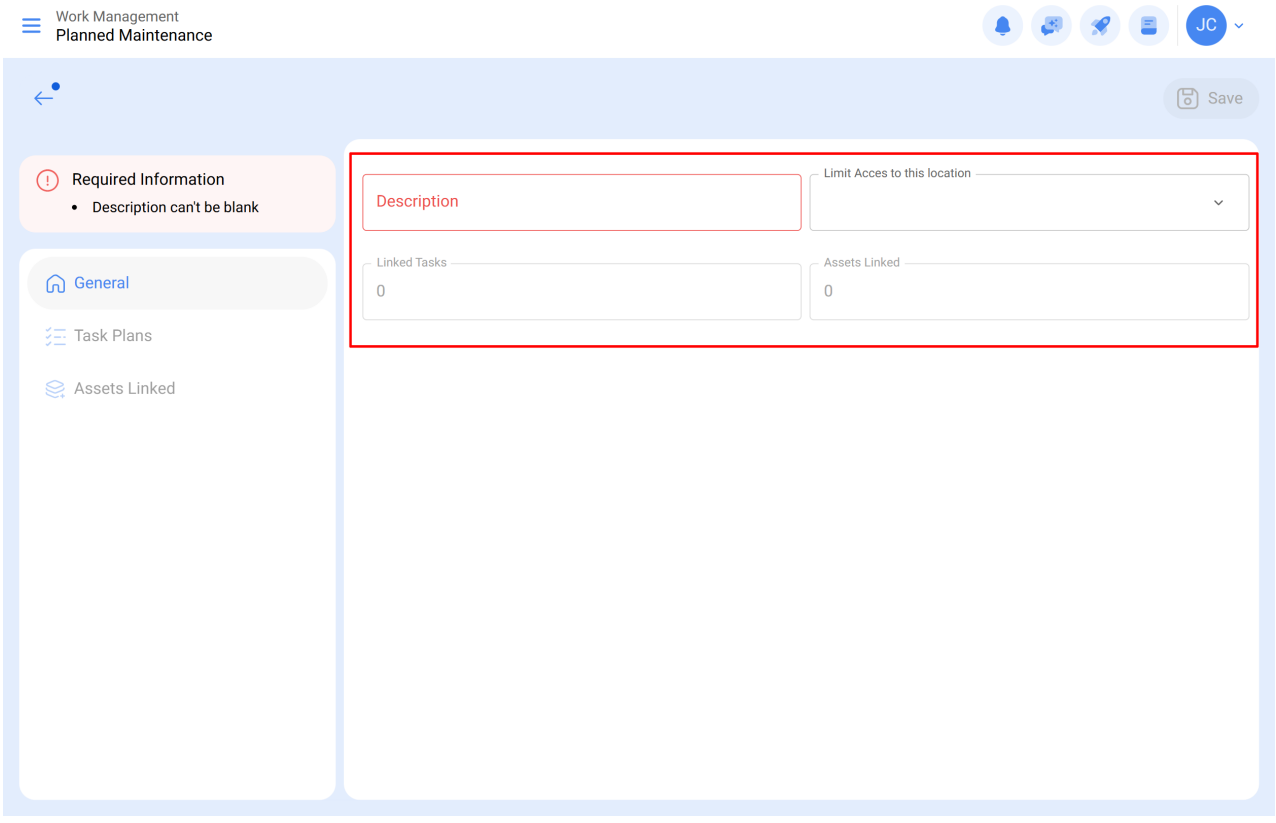




Clicking will open a new window where you must upload the information corresponding to the task plan you want to add, according to the following steps:

Step 1:

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

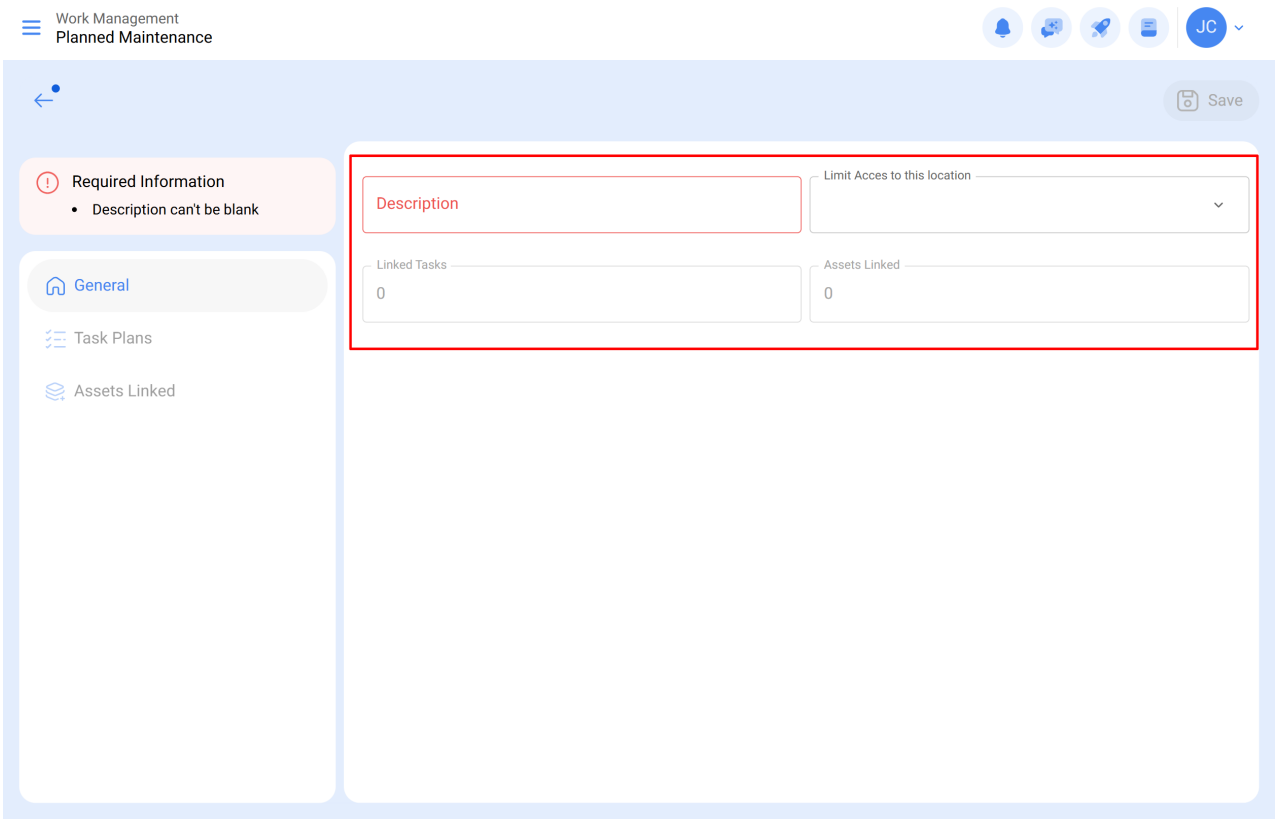


The information requested is as follows:

- **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).

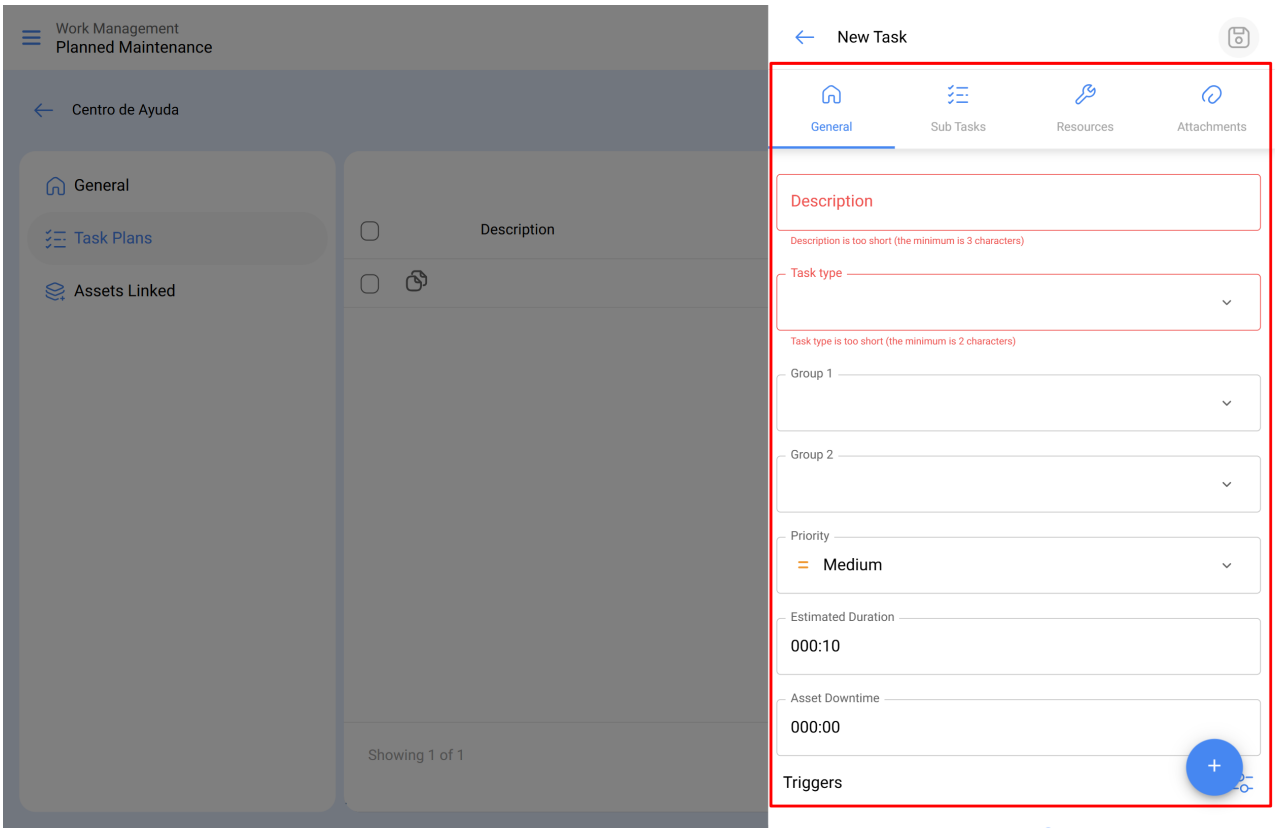
Step 2:

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.



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

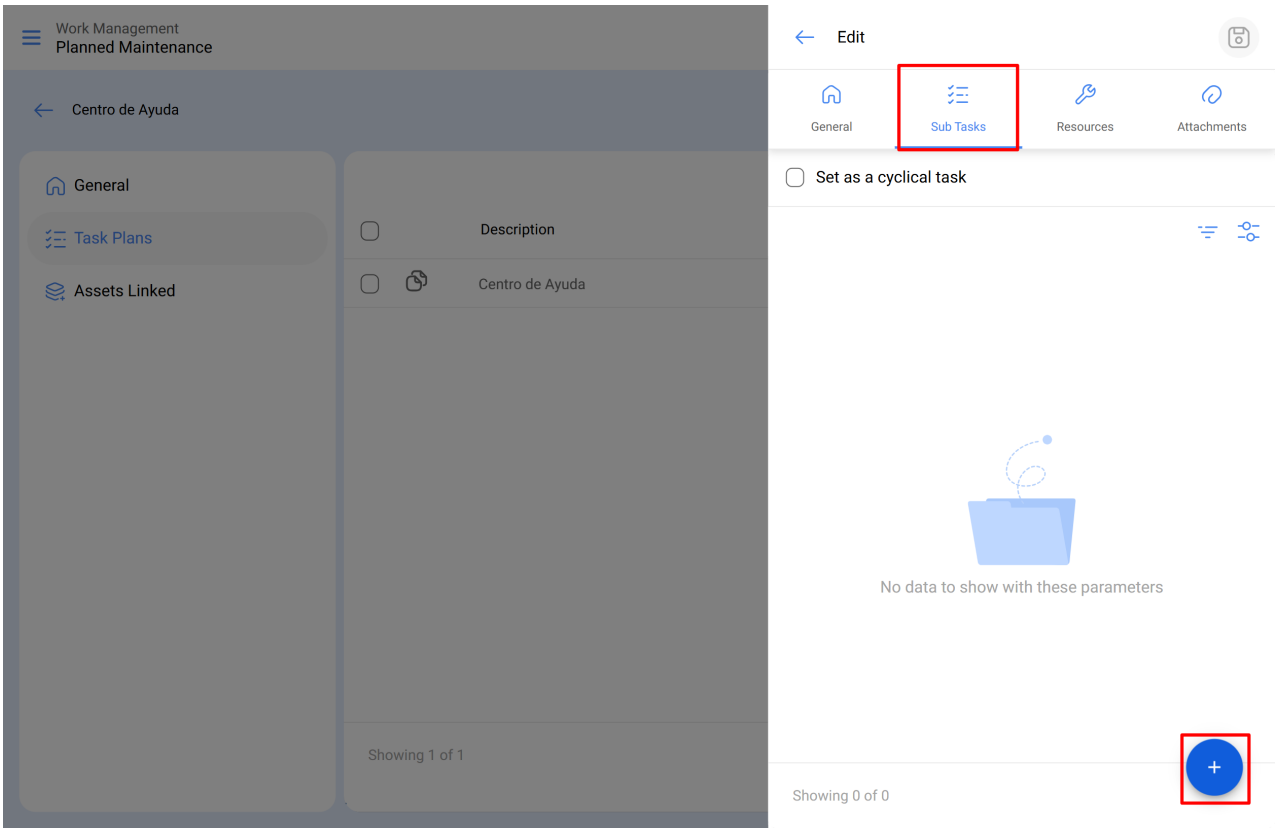
General:



- **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).

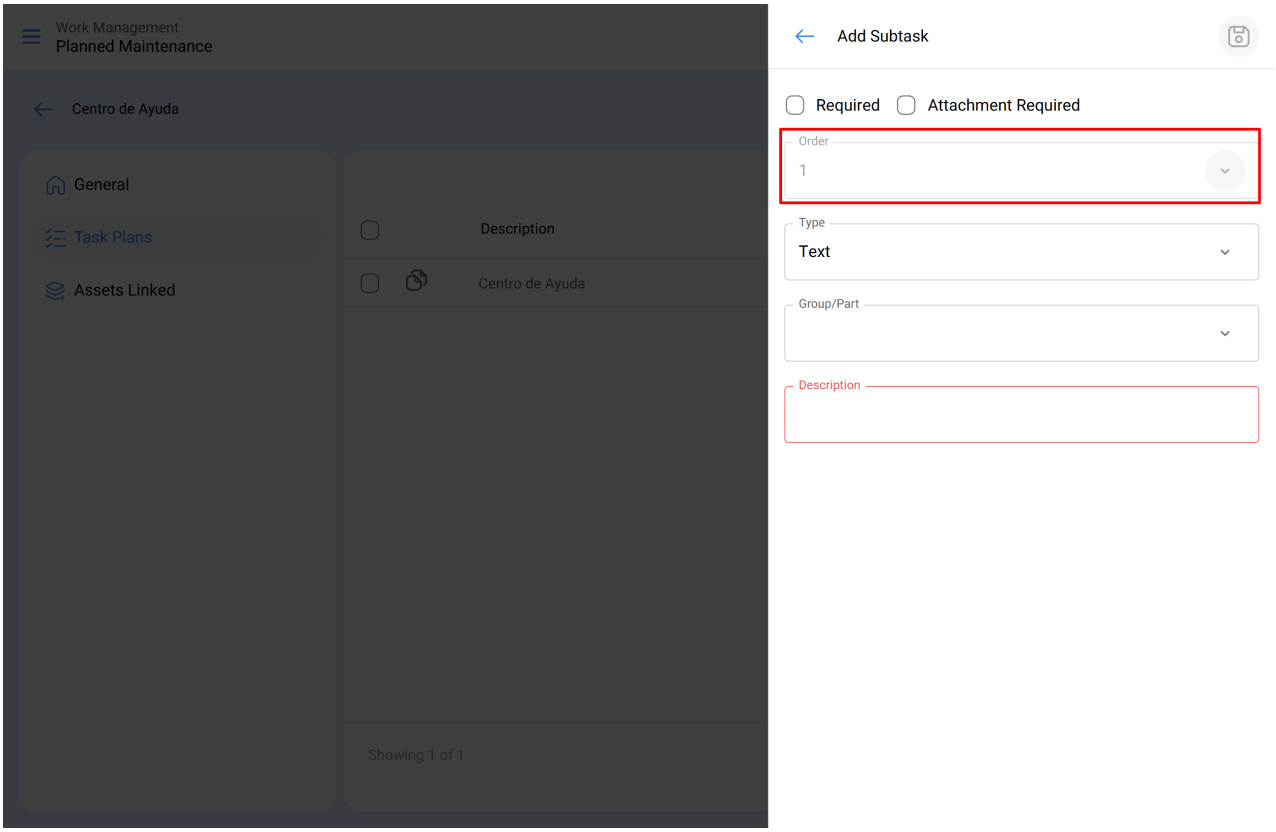
Subtasks:

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



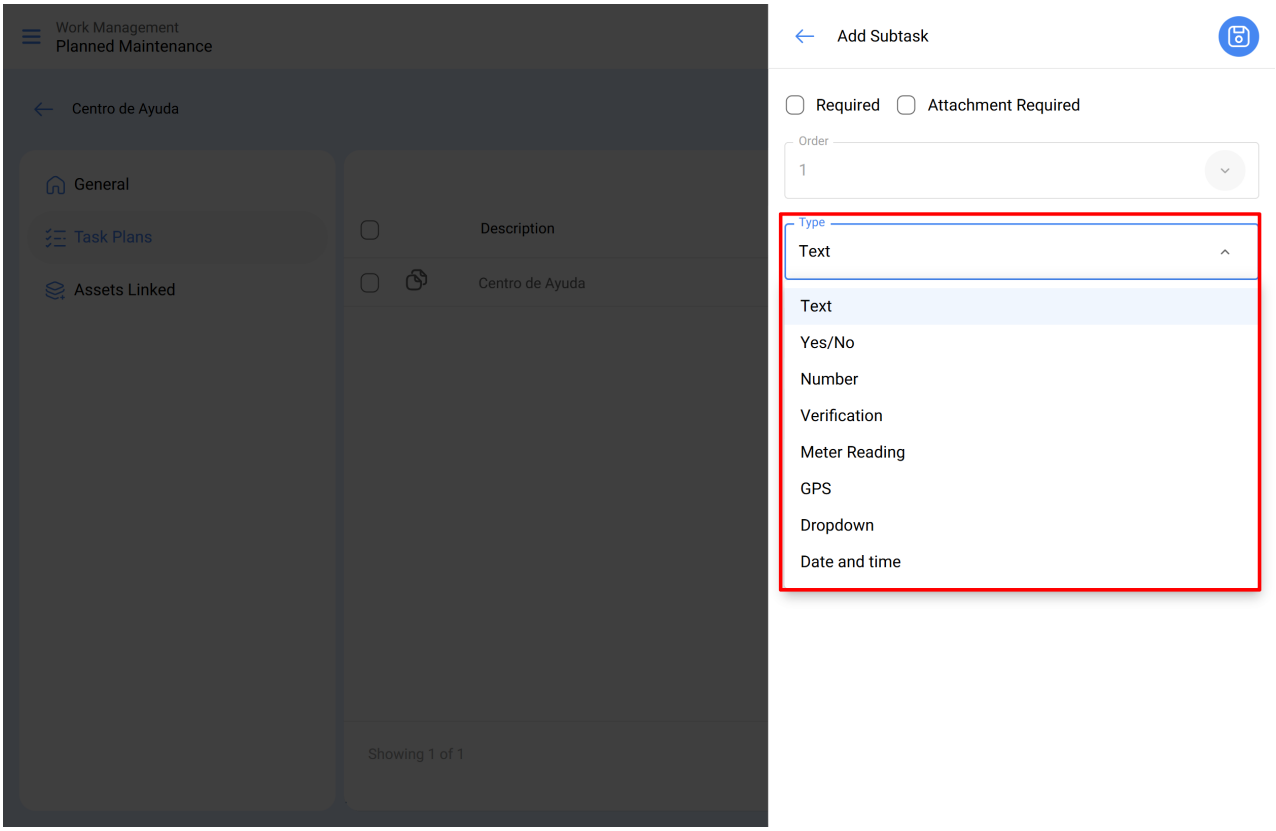
Order:

Sequence of sorting subtasks



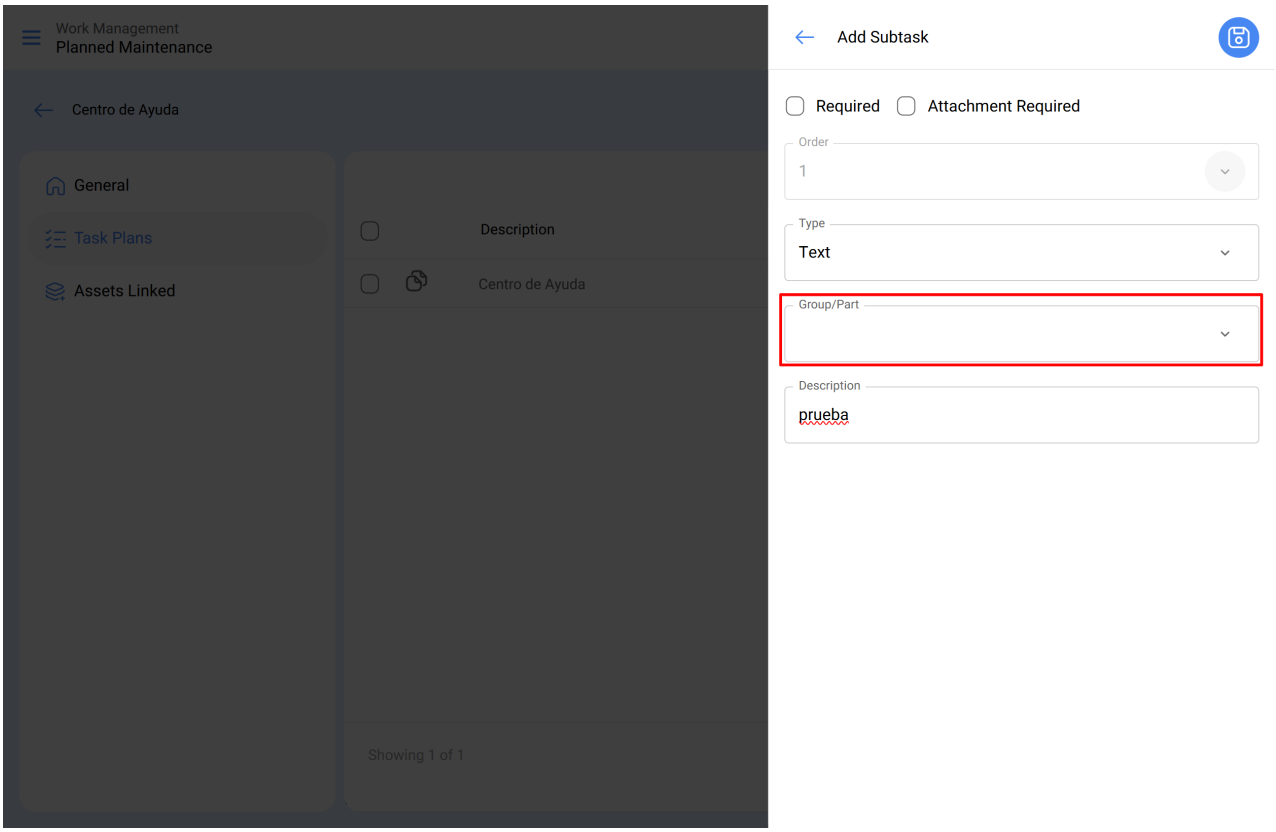
Type:

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.



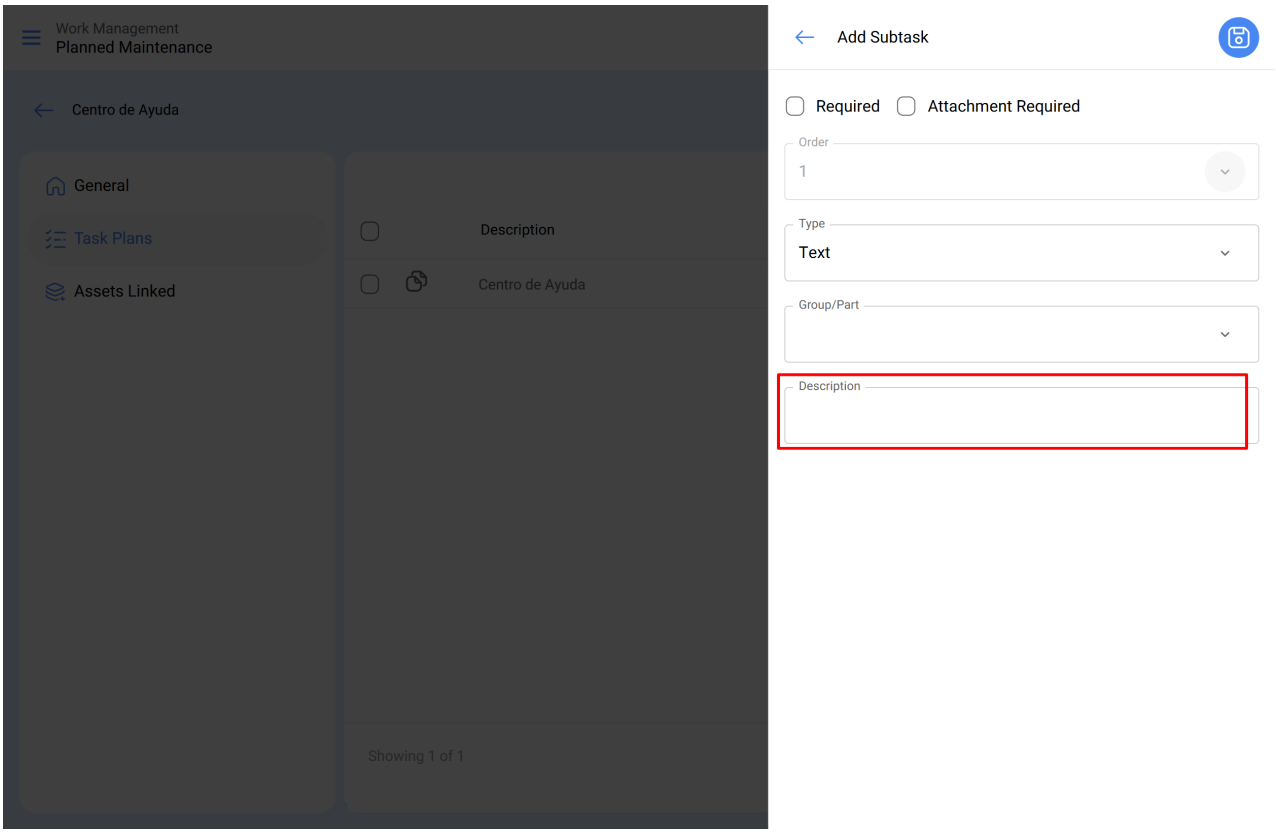
Group/Part:

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



Description:

Full detail describing the activity.

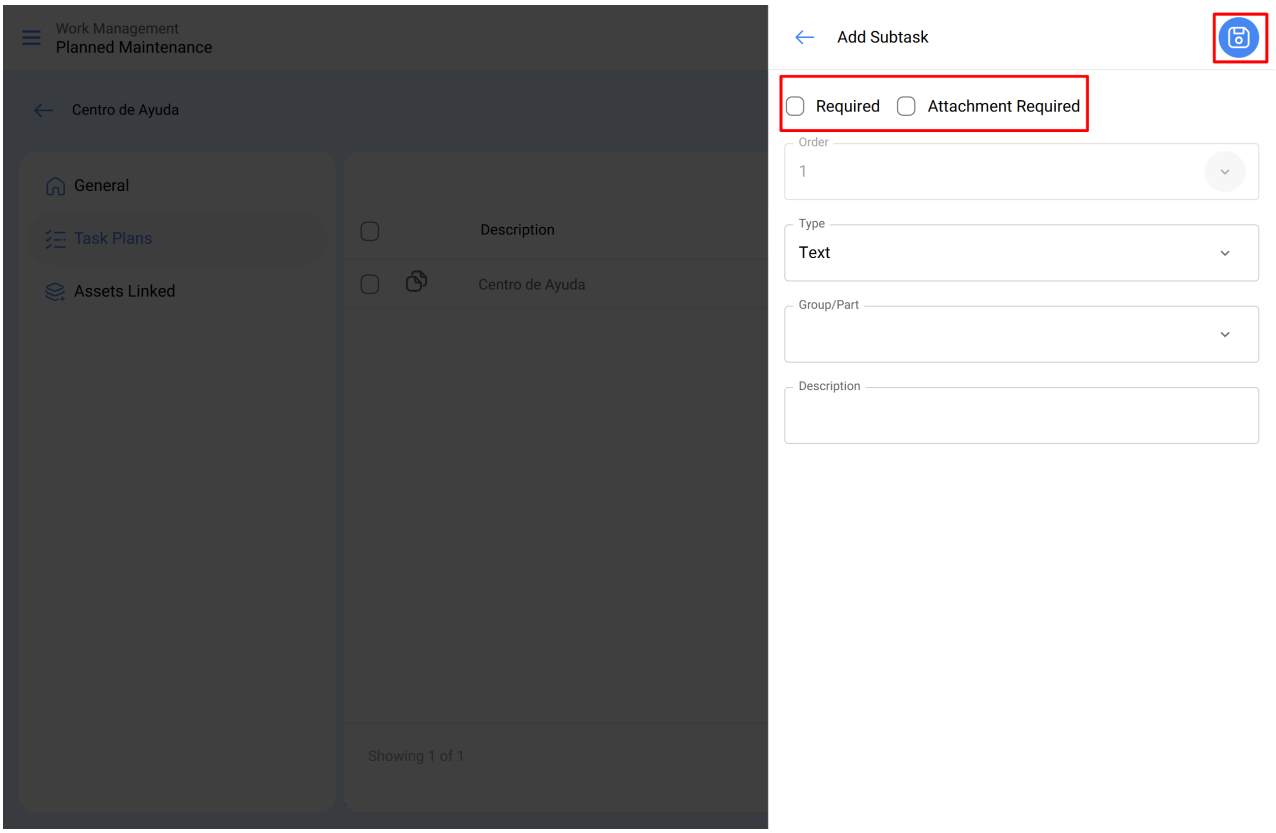


Required:

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:

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).

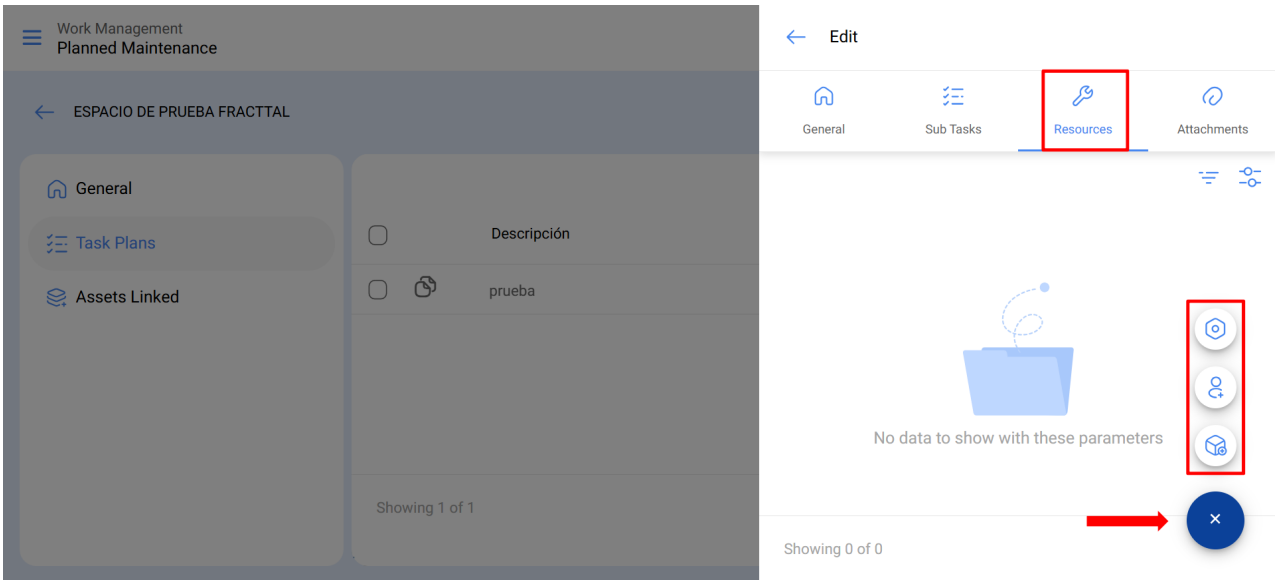


Iterations:

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:

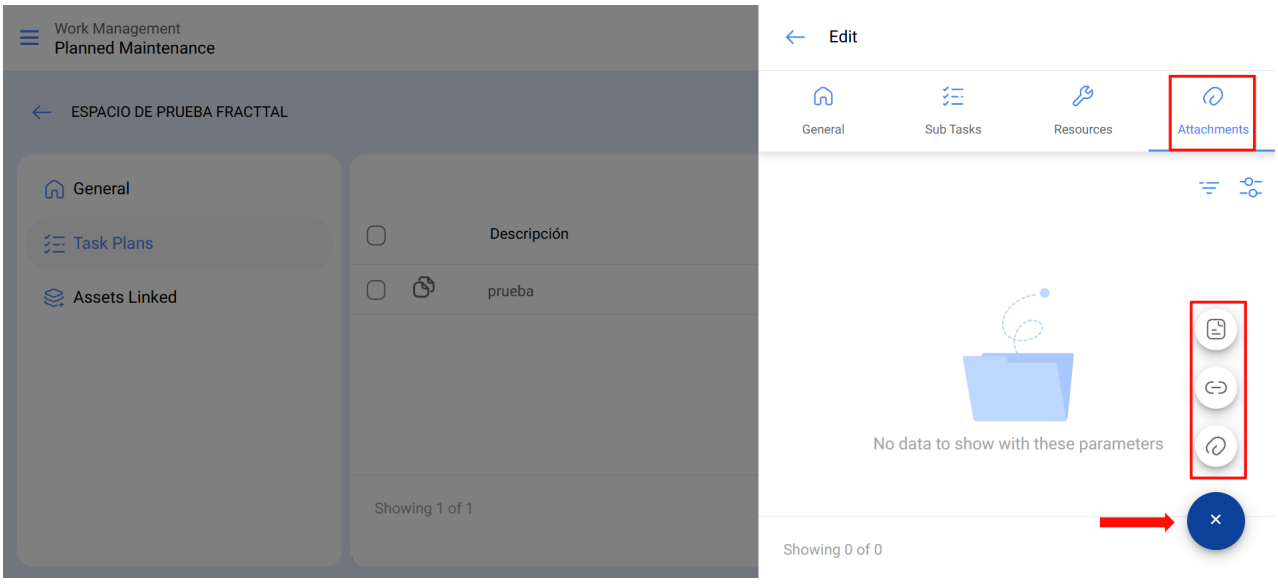
Resources can be added to tasks so that they are added each time that task is activated and are reflected in both the values to be used and the costs of the OS's. To do this, simply add the resources, which can be of the following classes:



- **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:



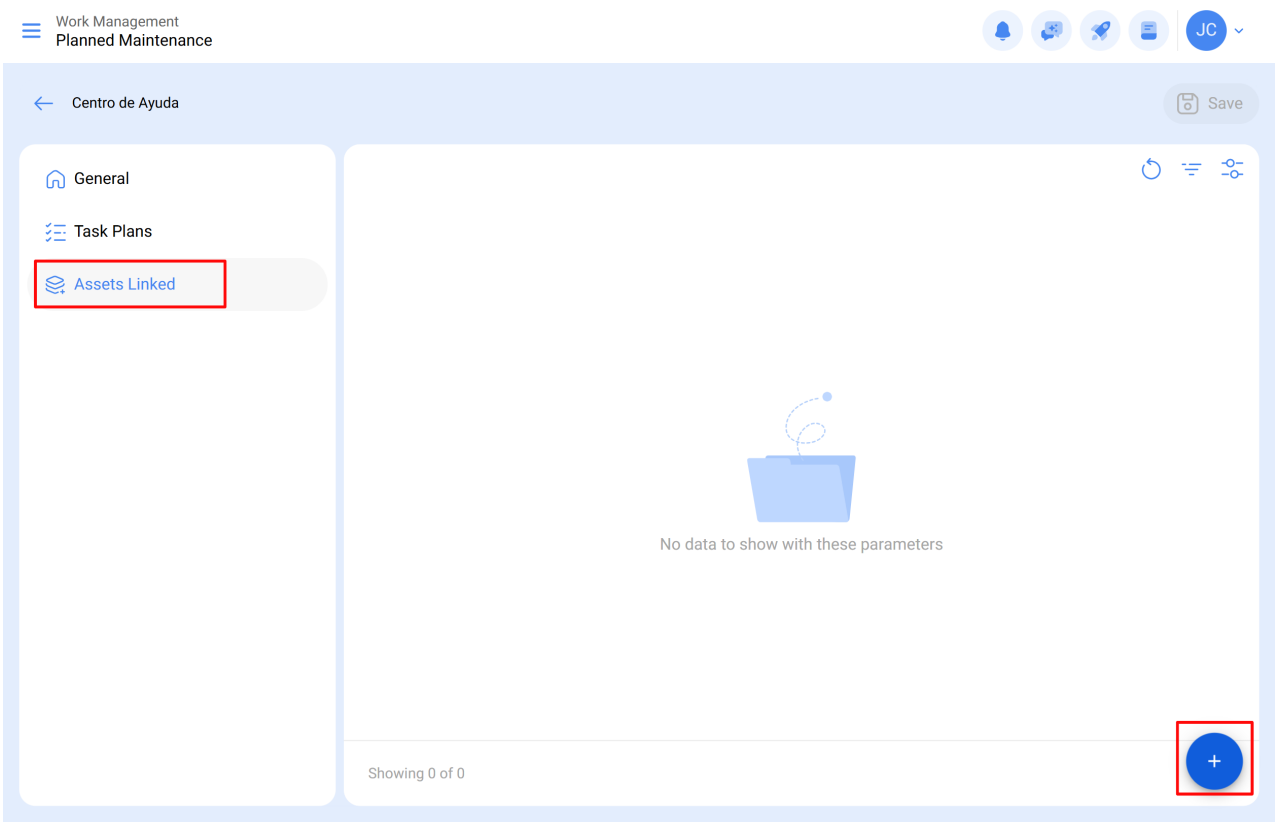
- **Note**: Corresponds to a field for adding a text note.
- **Link:** Direct links to web pages.

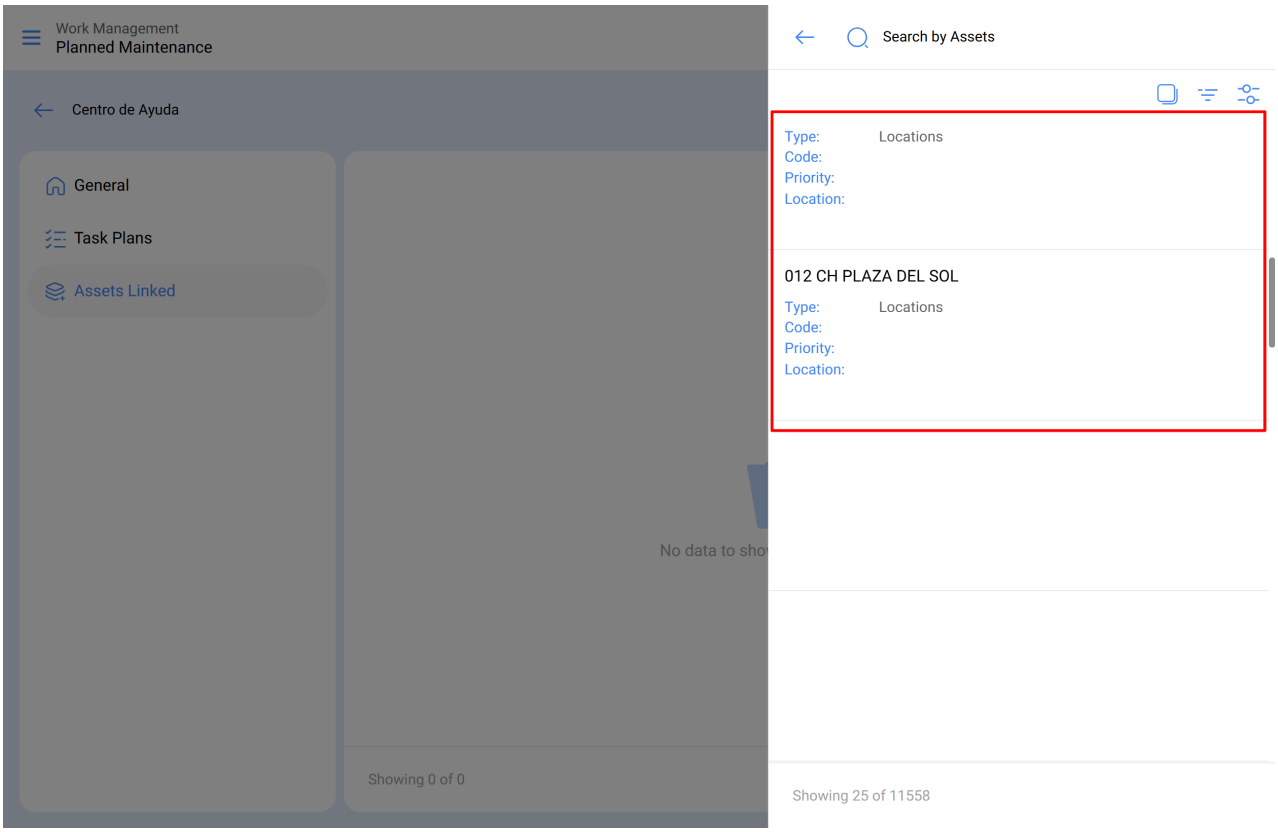
- **Files:** Corresponds to documents and images.

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.

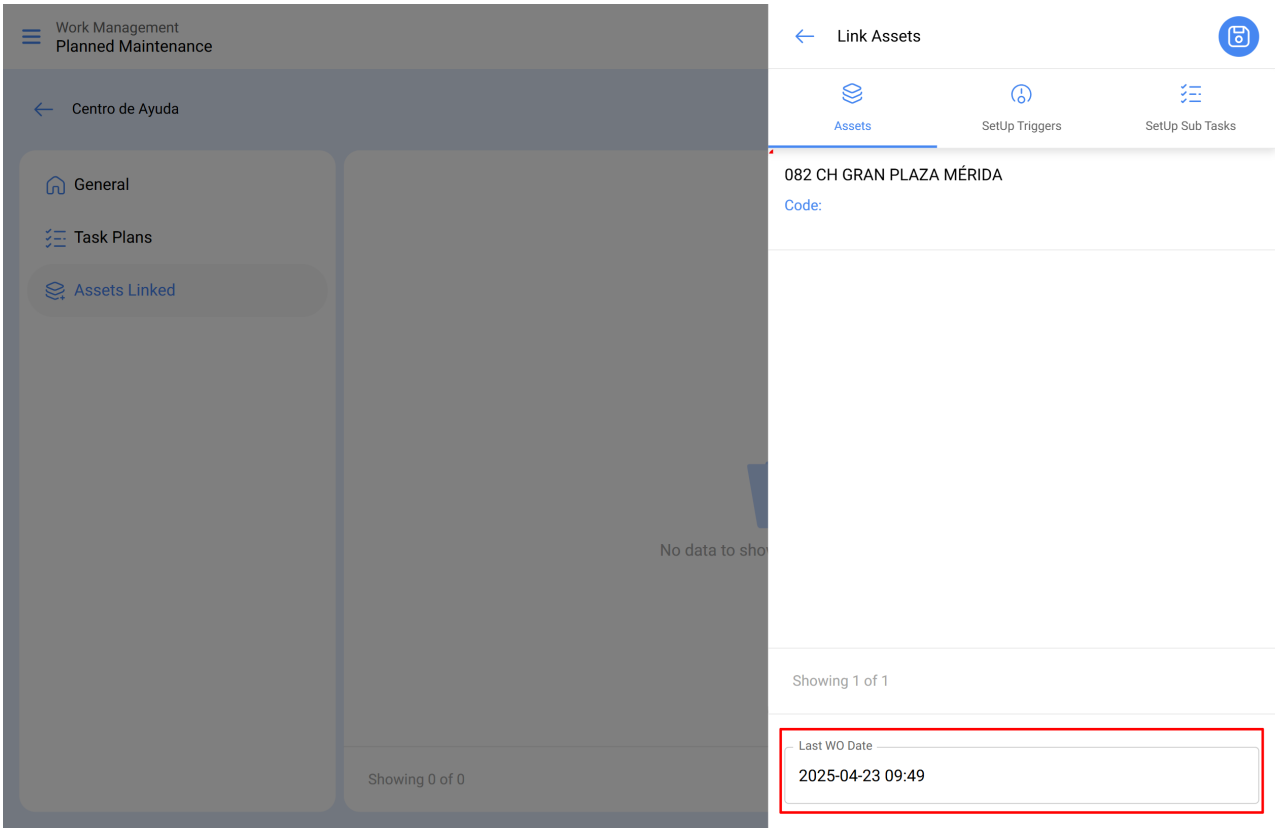
Step 3:

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.





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.