Basic Tutorials
Session 7 – Task Lists (time: 10 minutes)

Assumptions

1. You have completed sessions 1 through 6.

2. You are looking to become a comma CMMS intermediate-level user.

Notes

1. "Task Lists" automate the process of detailing the "Actions", "Task Types" and "Job Duration" of manually or automatically created work orders.

2. "Actions" are the actual job step, like "open the cabinet" or "empty oil reservoir".

3. "Task Types" are the classification of the "Action", like "Hydraulic"or "Electrical". These need to be set to match your reality.

4. "Job Duration" refers to the man-hour duration of each "Action".

5. **If you do not need to control your user's time or labor costs or if you plan to do it at a later stage, feel free to skim through this session.**

Proceed as Follows

1. **Create a Task List**

- Go to "Maintenance" → "Task Lists" and click the "+Task List" button on the top right.

- On the "General Information" section, enter

    - "Tutorial Task List" on the "Task List Name" text field.

    - "Tutorial Task List Description" on the "Task List Description text field.

- Click the "Add" Button. You are sent to the edit area of the task list you just created.

- Scroll down to the "Task List Contents" section. Note that it will not allow you to add "Actions" to the task list because you need to have at least one "Task Type" defined.

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You have created an empty task list.

2. **Create a Task Type**

- Go to "Logged in as…" → "Modules".

- Click the "Task Lists" link on the left column.

- On the "Add Task Type" section enter

  - "Default" on the "Name" field

  - "Default" on the "Description" field

  - Click the "Add" Button. The information will be added and the page will refresh.

3. **Add Task List Contents**

- Go back to "Maintenance" → "Task Lists" and let the information load. Select the "Edit" link on the row of the task list you created.

- Scroll down to the "Task List Contents" section and enter:

  - "Open filter holder, remove and clean filter. Reassemble. " on the "Action" field.

  - "0.25" on the "man-hour field (you are indicating this step takes 15 minutes because 15 minutes = 0.25 hours – use this google tool to convert time: http://goo.gl/U9LMNp).

  - Click the "+" button. The task will be added to the list.

You have just entered information on a task list. Even though there's only one line on our task list, you can see the potential: For a more complex job, you can have one line for electricians to isolate the electrical panel, another for mechanics to open the filter holder and so on.

Status after Session 7

You now know how to create task lists.

Coming Next

After the creation of equipment on session 5, the creation of tools on session 6 and

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the creation of task lists on this session, the next session will finally show you how it all ties in.

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