

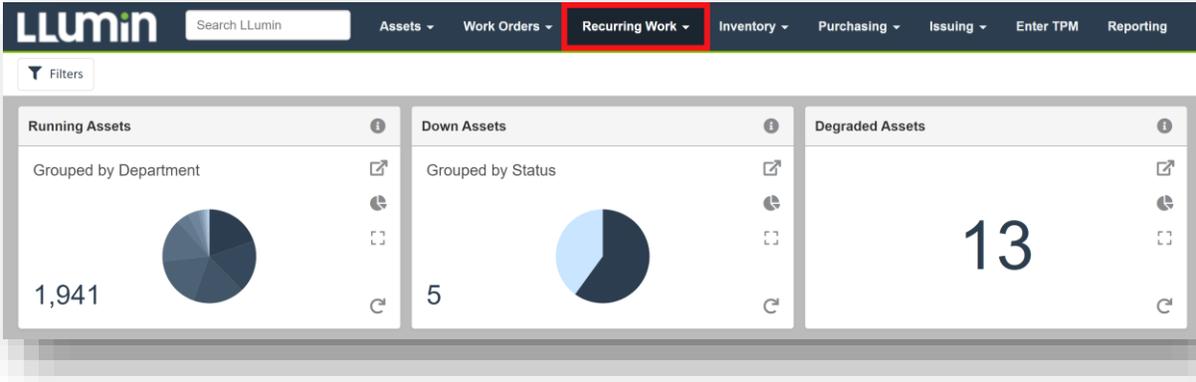
# How to Create a Recurring Task

**Recurring Work (RW)**, also referred to as **Preventive Maintenance (PM)**, involves regular maintenance tasks to keep assets, equipment, and facilities in good working condition. This proactive approach helps detect and address issues before they lead to significant problems.

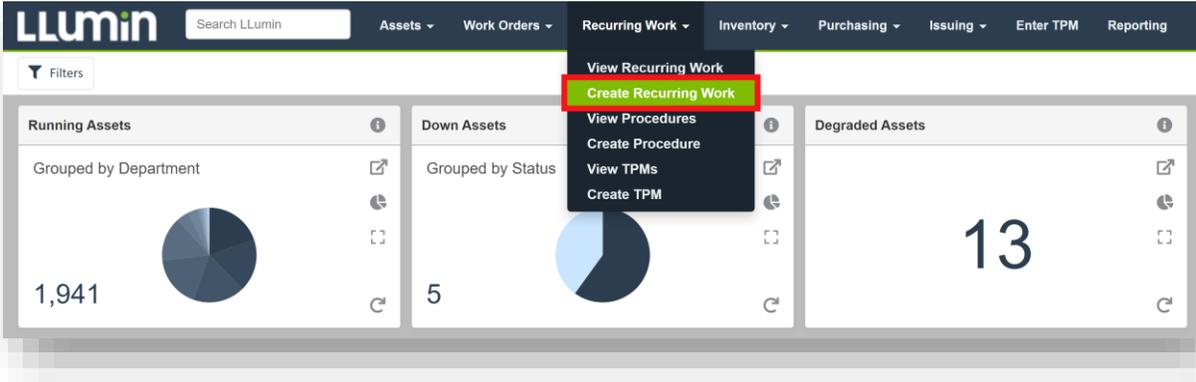
## Instructions

To set up a Recurring Work Order, follow these steps:

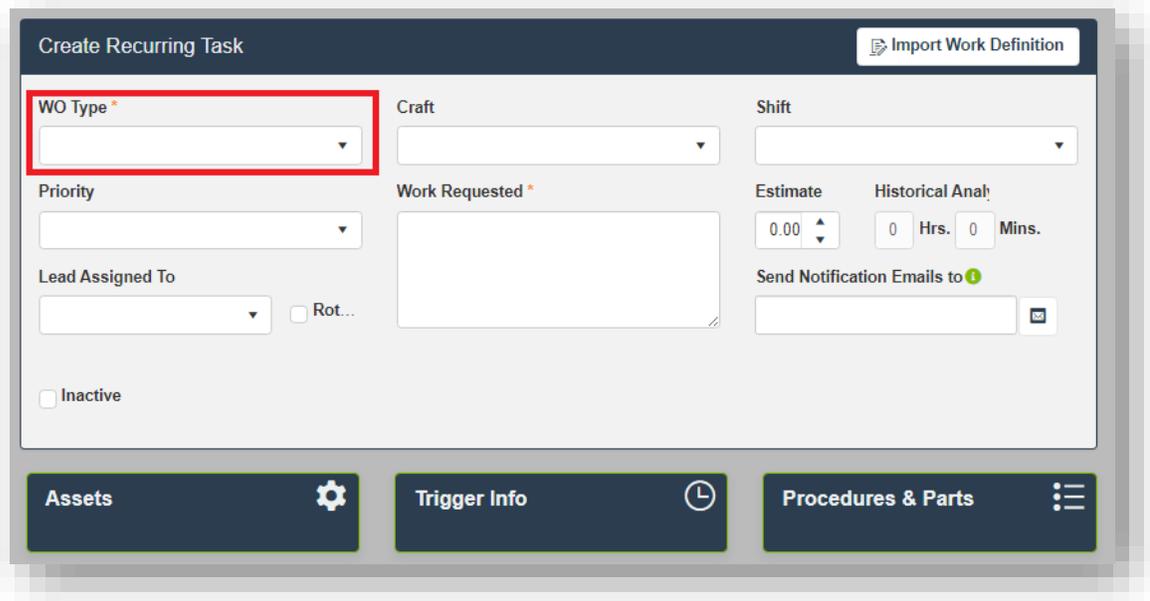
1. Go to the **Recurring Work** drop-down menu on the menu bar.



2. Select **Create Recurring Work**.

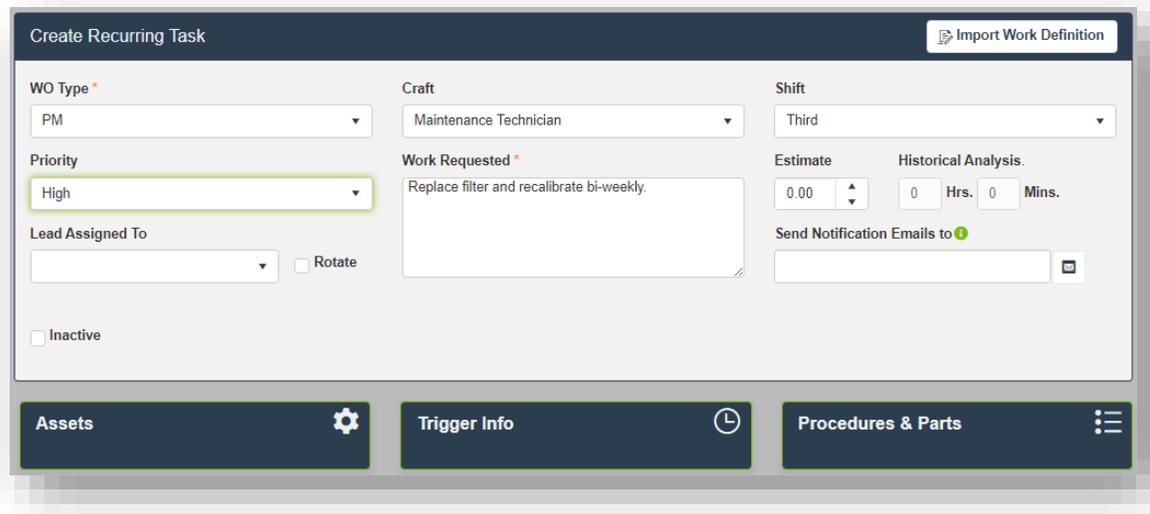


3. On the **Create Recurring Task** screen, select a **WO Type**.



The screenshot shows the 'Create Recurring Task' form. The 'WO Type' dropdown menu is highlighted with a red border. Other fields include 'Craft', 'Shift', 'Priority', 'Work Requested', 'Estimate', 'Historical Analysis', 'Lead Assigned To', 'Send Notification Emails to', and 'Inactive' checkbox. The bottom navigation bar contains 'Assets', 'Trigger Info', and 'Procedures & Parts' buttons.

4. Provide a description of the **Work Requested** and fill in any additional optional fields (such as priority, craft, shift, etc.) as needed.



The screenshot shows the 'Create Recurring Task' form with the following fields filled out: 'WO Type' is set to 'PM', 'Priority' is set to 'High', 'Craft' is set to 'Maintenance Technician', 'Shift' is set to 'Third', and 'Work Requested' contains the text 'Replace filter and recalibrate bi-weekly'. The 'Estimate' is 0.00, and 'Historical Analysis' is 0 Hrs. 0 Mins. The 'Send Notification Emails to' field is empty. The 'Inactive' checkbox is unchecked. The bottom navigation bar contains 'Assets', 'Trigger Info', and 'Procedures & Parts' buttons.

5. Click the **Assets** tab below the fields.

Create Recurring Task Import Work Definition

WO Type \*  Craft  Shift

Priority  Work Requested \*  Estimate  Historical Analysis.  Hrs.  Mins.

Lead Assigned To   Rotate Send Notification Emails to

Inactive INST \*

**Assets**  Trigger Info  Procedures & Parts

6. Select **+Add**, then choose one or more assets by checking the boxes next to their names and clicking **Select**.

Assets

ID	Description	Next Due Date	End D...
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Asset Finder 7395    Grid View  Organization View

<input type="checkbox"/>	Asset ID	Description	Plant	Department	Manufa
<input type="checkbox"/>	00	Common to power plant	Portland Power Plant	Common to pow...	
<input checked="" type="checkbox"/>	00BBA	MV Switchgear Container	Portland Power Plant	Common to pow...	
<input type="checkbox"/>	00BBA00	Commun to MV Switchgear Container	Portland Power Plant	Common to pow...	

7. Alternatively, use the **Add from map** option to select assets visually.
8. Then, select **Trigger Info**.

**Create Recurring Task** Import Work Definition

WO Type \*  Craft  Shift

Priority  Work Requested \*

Estimate  Historical Analysis:  Hrs.  Mins.

Lead Assigned To   Rotate  Inactive

Send Notification Emails to

**Assets** **Trigger Info** **Procedures & Parts**

9. On the **Trigger Info** screen, choose your preferred **Trigger Method** (such as By Date, By Utilization, or both).
10. Fill out the remaining fields based on the selected trigger method:
  - **By Date:** Set the **Next Due Date** for the task.
  - **By Utilization:** Set the **Next Interval Amount**.
  - **Both:** Complete both the **Next Due Date** and **Next Interval Amount**.

**Recurring Task Details**

- Trigger Info
- Assets
- Procedures & Parts

**Trigger Info**

Trigger Method \*

Create next work order days before due \*

**Create future work orders to be due**

After completion date  After due date

Create Single Multi-Asset Work Order ⓘ  Allow RW to trigger while previous WO is open

Only trigger Work Orders during:

<input checked="" type="checkbox"/> Jan	<input checked="" type="checkbox"/> Feb	<input checked="" type="checkbox"/> Mar
<input checked="" type="checkbox"/> Apr	<input checked="" type="checkbox"/> May	<input checked="" type="checkbox"/> Jun
<input checked="" type="checkbox"/> Jul	<input checked="" type="checkbox"/> Aug	<input checked="" type="checkbox"/> Sept
<input checked="" type="checkbox"/> Oct	<input checked="" type="checkbox"/> Nov	<input checked="" type="checkbox"/> Dec

Only trigger Work Orders on:

Since this Recurring Task does not trigger daily, it cannot be configured to exclude specific days of the week. In order to schedule triggers on specific days of the week, set the Trigger Interval to 1 day, then make your selections.

11. Go to the **Procedures and Parts** sections to associate at least one Procedure and any relevant Parts with the Recurring Task.

The screenshot displays a software interface for managing recurring tasks. On the left is a dark sidebar with navigation links: 'Recurring Task Details', 'Trigger Info', 'Assets', and 'Procedures & Parts' (which is highlighted in green). The main content area is titled 'Procedures & Parts' and is divided into two sections.

The top section, 'Procedures Estimate', contains two input fields: 'Hrs.' with the value '0' and 'Mins.' with the value '0'. Below this is a dark header for the 'Procedures' table, which includes a '+ Add new record' button. The table has columns for Procedure, Description, Asset(s), Details, Reorder Assets, and a delete button. One row is visible with Procedure ID '107', Description 'Prewrite - Quality', and a green dropdown menu indicating '2 item(s) selected'. Action buttons for 'View', 'Reorder Assets', and 'Delete' are present for this row.

The bottom section, 'Parts', also features a '+ Add new record' button. Its table has columns for Item #, D..., Stockroom, Issue Qty, C..., UM, Ext Cost, and a delete button. One row is visible with Item # 'AF0008', Description 'Pump ...', Stockroom '01', Issue Qty '1', C... '4.64', UM 'EA', and Ext Cost '4.64'.

12. After completing all relevant fields, click **Create** at the bottom of the page to finalize the Recurring Task.

The screenshot displays the 'Procedures & Parts' interface. On the left is a sidebar with navigation options: 'Recurring Task Details', 'Trigger Info', 'Assets', and 'Procedures & Parts' (which is highlighted in green). The main content area is titled 'Procedures & Parts' and contains the following sections:

- Procedures Estimate:** Includes input fields for 'Hrs.' (0) and 'Mins.' (0).
- Procedures:** A table with columns: Procedure, Description, Asset(s), Details, Reorder Assets, and an action column. It features an '+ Add new record' button and a table with one row:

Procedure	Description	Asset(s)	Details	Reorder Assets	
107	Pework - Quality	2 item(s) selected	View	↑↓	Delete
- Parts:** A table with columns: Item #, D..., Stockroom, Issue Qty, C..., UM, Ext Cost, and an action column. It features an '+ Add new record' button and a table with one row:

Item #	D...	Stockroom	Issue Qty	C...	UM	Ext Cost	
AF0008	Pump ...	01	1	4.64	EA	4.64	Delete

At the bottom of the interface, there is a dark blue bar containing a green 'Create' button (highlighted with a red box) and a 'Go Back' button.