
CUSTOMER GUIDE: Recurring Task Templates

Overview

If you have many assets in your fleet that are the same/similar type or class, you will definitely want to use the Task Templates feature.

In FLEETMATE there are two ways to get reminders scheduled: manually enter them into a vehicle schedule, or tell FLEETMATE to create them for you automatically using something called a **Recurring Task**.

An easy way to remember how reminders and tasks function is the following:



FLEETMATE Reminder System Hierarchy

There is also an object in FLEETMATE called a **Task Template**. A Template is a collection of Recurring Tasks. These recurring tasks are owned by the Template, not by any specific vehicle. Further, each Template and all of the tasks it contains can be reused with a simple assignment process. The Template feature was designed for two (2) purposes: to save you time typing, and to help keep your maintenance reminders consistent across your fleet.

There are two (2) ways to assign a Recurring Task to a vehicle: manually enter it using the Setup Vehicle Reminders window; or assign a **Task Template** to the vehicle. With the latter, the vehicle then **inherits** all of the recurring tasks that are owned by the Task Template.

If you have many vehicles in your fleet that are the same or similar type or class, using **Task Templates** is the recommended approach for most or all of your PM scheduling requirements.

If any changes are made to the tasks within a template, all of the vehicles that have been assigned that template will immediately inherit the changes. In this relationship it is important to understand that the Template owns the recurring tasks, not the vehicle.

This document will discuss Task Templates, how to create them, and how to assign them to vehicles in your fleet.

CUSTOMER GUIDE: Recurring Task Templates

Adding a Task Template



To add a Task Template, click the **Setup Task Templates** toolbar button, or use the **Company Data | Setup Task Templates...** menu option. The Setup Task Templates window will appear.

Existing Templates will appear in the upper pane of the Setup Task Templates window. The lower pane will list the recurring tasks that are owned by the Template that is selected in the upper pane. If you click on a different Template in the upper pane, you'll see the tasks change in the lower pane.

To add a new Task Template, right-click in the upper pane and choose **Add New Task Template...** from the popup menu. This will open a new **Task Template** window.

Each Template must be assigned a unique **Template Number**. You may want to assign a certain series of numbers for each type of template you create. Enter a number and press [**Tab**].

Enter a **Template Type**, or select a type from the droplist. The Template Type is used to categorize your templates. Many times it may be useful to use the **Template Type** to identify a broad class of asset. Some examples would be Cars/Light Trucks, Medium Duty Diesel, Heavy Duty Diesel, CNG Material Handling, Electric Material Handling, etc.

Enter a **Description** for this Template. The Description field is usually used to further describe the types of tasks that this template will contain. Some examples might be Frequent PM, Long Term PM, Periodic Inspection, Schedule-A, Schedule-B, etc.

The **Comments** field can be used to make any special notations that may be useful to you. This is a free form, scrollable field that can accommodate up to 32000 characters.

Click the **OK** button to save your Template definition, or click **Cancel** to discard your entries.

CUSTOMER GUIDE: Recurring Task Templates

Adding Recurring Tasks to a Template



With the Setup Task Templates window open, recurring tasks will be listed in the lower pane for the template selected in the upper pane. To add a recurring task to a template, first select the template in the upper pane.

Right-click in the Tasks list area in the lower pane, and then choose **Add Recurring Task...** from the popup menu. A new Recurring Task record will appear.

On the Recurring Task window, select the **Schedule By** option you need: by **Odometer**, by **Time**, or by **Both**. If you want a reminder gauge displayed on the main window, check the box labeled **Gauge**. Next, set the **distance** or **time** interval, or **both** if you selected that option. Note that for time you can set the interval by **Days** or by **Months**.

The **Completion Window** droplist enables you to set the type of window that will automatically open when you ultimately complete the reminders that this task will create. For maintenance, repair, and/or inspection activities you'll likely want to use **Work Order**. For reminders relating to payments, insurance premiums, registration fees, etc., you will want to set the Completion Window to **Payment/Expense**.

Enter a **Type** value or select a type from the droplist. The type helps to categorize your Recurring Tasks. Enter a **Description** for this Task. Examples might be generic like "30000 Mile Routine Service", or more specific like "Lube Oil and Filter". This description will become the description of a Labor line on your Work Order when the related reminder is ultimately completed.

If you expect to pay a **Fixed Price** for this work, enter a dollar amount, and then enter the **Vendor** name if applicable. This feature is handy if you have contracted with a local firm to handle your routine maintenance activities. These fields are optional.

If you are using inventory parts kits, use the **Parts Kit** droplist to define the kit to use for this recurring task. When the resulting reminder is completed, the parts within the kit will be added to your work order. Defining a Parts Kit is optional.

If no prior maintenance data exists for this task, select whether you want to use the **Current Odometer**, **Purchase Odometer**, or **Zero** when this task creates a Scheduled Reminder.

If you check the **Lock Initial Reminder** box, the very first reminder that is created will remain locked at the appropriate odometer and/or date values until the initial reminder is completed. Afterwards, subsequent reminders will be based on existing maintenance activity from Work Orders in your database.

Click **OK** to save your Recurring Task and add it to the current template, or click **Cancel** to discard your entries.

CUSTOMER GUIDE: Recurring Task Templates

What Happens After I Add a Recurring Task to a Template?

When you close the Setup Task Templates window after adding one or more recurring tasks, FLEETMATE will begin examining your current vehicle data to determine if any vehicles are assigned any of the templates you have created. If one or more vehicles have been assigned one or more templates, then the vehicle will inherit the appropriate **Recurring Tasks**.

Recall that once a recurring task is in place, it will begin its job of setting up any necessary reminders for you. All of this is performed automatically, behind the scenes. Refer to the Customer Guide entitled Recurring Tasks for a further explanation of how this takes place.

If no templates are assigned to a vehicle, then no action occurs. A template must be assigned to a vehicle in order for any further action to take place.

CUSTOMER GUIDE: Recurring Task Templates

Editing a Recurring Task on a Template



You may find that you want to change a Scheduled Reminder. If you manually entered the scheduled reminder, you can freely edit it to meet your needs. However, it is important to understand that reminders that are scheduled by Recurring Tasks are under the absolute control of the recurring task.

If you change a reminder that was scheduled by a recurring task, your changes will be discarded by the system, and the reminder will be rescheduled following the intervals you originally defined. Further, if you change a Recurring Task that is owned by a Template, your changes will be lost, since the Template owns these tasks.

If you want to change a recurring task that is in place via a template assignment, you need to edit the recurring task at the Template level. Then the assigned vehicles will inherit the changes.

To edit a recurring task on a template, select the Template in question in the upper pane of the **Setup Task Templates** window, and then double-click on the **Recurring Task** you need to edit.


The Recurring Task window will appear. You may now make whatever changes are needed.

Click **OK** to save your changes, or click **Cancel** to discard your changes and to leave the record unchanged.



More Information

Initial Reminders that are **Locked** are not altered when you change the related Recurring Task on a Template. In this case you will need to manually delete the related scheduled reminder, and allow FLEETMATE to reschedule it for you.

Reminders that are initially locked are easily identified with a  icon in the **Scheduled Reminders** tab on the **Setup Vehicle Reminders** window.

CUSTOMER GUIDE: Recurring Task Templates

Deleting a Recurring Task from a Template



To delete a recurring task from a template, first select the Template in question in the upper pane of the **Setup Task Templates** window, and then right-click on the **Recurring Task** you need to delete and choose **Delete Recurring Task** from the popup menu.


If you have Delete Confirmation activated, the system will ask if you are sure you want to delete this record. Click either the **Yes** or **No** button. If you do not have Delete Confirmation activated, the record will be immediately deleted from your database.

When you close the **Setup Task Templates** window, FLEETMATE will begin reviewing the impact of your changes. If the deletion will affect one or more vehicle reminder schedules, the system will ask if you want to update your reminders that are currently scheduled. Under normal circumstances you will always want to answer **Yes** to this prompt. This will ensure that your reminder schedules mirror your template definitions.



More Information

When you delete a Recurring Task from a Template, the Recurring Task is also removed from each vehicle's reminder schedule that has been assigned the Template. A related Scheduled Reminder is also removed, provided that maintenance history exists for the Recurring Task activity. However, **Initial Reminders** that are **Locked** are not deleted when you delete the related Recurring Task from a Template. In this case you will need to manually delete the related scheduled reminder.

Scheduled Reminders that are initially locked are easily identified with a  icon in the **Scheduled Reminders** tab on the **Setup Vehicle Reminders** window.