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## CUSTOMER GUIDE: 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.

In FLEETMATE there are two ways to get reminders scheduled: manually enter them into a vehicle schedule (*only recommended in very special cases*), or tell FLEETMATE to create them for you automatically using something called a Recurring Task. Recurring Tasks are important.

An easy way to remember the relationship between reminders and recurring tasks is illustrated below.



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### FLEETMATE Reminder System Hierarchy

There is also an object in FLEETMATE called a **Template**. A Template is a *collection* of recurring tasks that apply to a certain type or class of fleet asset. 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 avoid unnecessary data entry (*that saves time*), and to help keep your maintenance reminders consistent across your entire fleet.

There are two (2) ways to assign a recurring task to a vehicle: manually enter it to a vehicle 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 Template. Using a Task Template is the BEST way to proceed.

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## CUSTOMER GUIDE: Task Templates

### Overview

If you have many vehicles in your fleet that are the same or similar type or class, using Templates is the recommended approach for your PM scheduling requirements. A template is a collection of recurring tasks.

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. So when you alter the recurring tasks on a Template, all of the assets that have that Template assigned will immediately get the change(s), automatically.

A template is defined once and then applied to many different vehicles. This avoids the need to repeatedly define recurring tasks on each vehicle in your fleet.

Another advantage is that once you have a template assigned to many different fleet vehicles, changing a recurring task on a template will change the PM reminder schedule for all related vehicles. In other words, if you need to change the LOF interval from 3000 miles to 5000 miles, simply edit the LOF recurring task on your template. All reminders for all vehicles that have been assigned the template will be updated automatically.

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

### What is a Recurring Task?

A recurring task is a specific preventive maintenance activity that needs to repeat based on an interval that you define. Here are some examples of service activities that would be defined as recurring tasks.

- LOF (Lube Oil Filter) - every 5000 miles 500 hours and/or every 90 days.
- Tire Rotation - every 5000 miles and/or every 90 days.
- Regulatory Safety Inspection – every 90 days
- Cooling System Flush – every 24 months

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## CUSTOMER GUIDE: Task Templates

### Organizing Your Templates

Templates are flexible, and can be used in a variety of different ways. A key factor in achieving success using templates is identifying common ground in maintenance requirements across your fleet assets. The following is just one simple example.

#### By Asset Class

##### 1. TEMPLATE – Automobiles – Routine PM

- a. *PM-A (Frequent PM – Every 3-6 Months)*
- b. *PM-B (Less Frequent PM – Every 12 Months)*
- c. *PM-C (Infrequent PM – Every 36 Months)*

##### 2. TEMPLATE – Light Trucks and Vans – Routine PM

- a. *PM-A (Frequent PM – Every 3-6 Months)*
- b. *PM-B (Less Frequent PM – Every 12 Months)*
- c. *PM-C (Infrequent PM – Every 36 Months)*

##### 3. TEMPLATE – Heavy Trucks – Routine PM

- a. *PM-A (Frequent PM – Every 3-6 Months)*
- b. *PM-B (Less Frequent PM – Every 12 Months)*
- c. *PM-C (Infrequent PM – Every 36 Months)*

In the example above, we assume there is a mix of vehicle types in the fleet. Therefore, three templates have been defined, each for a different *class* of asset. Each template contains three recurring tasks; each of which is based upon how frequently preventive maintenance activities will be required.

Expanding on this example, you could create templates within each of the three classes based on manufacturer. This could be helpful if each manufacturer requires vastly different preventive maintenance requirements.

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### 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 recurring tasks that this template will contain. A description can be as simple as "Routine PM."

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.

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### Adding Recurring Tasks to a Template



With the Setup Task Templates window open, recurring tasks will be listed in the lower pane for whichever template is 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.

**Edit Recurring Task**

**Task Scheduling**

Schedule by:  Usage  Days/Months  Both

Due every: 5000 Miles or every: 500 Hours

3  Days  Months

**Schedule the initial reminder based on**

Current Meter/Date  Purchase Meter/Date  Zero

Window: Work Order  Type: Scheduled PM

Description: PM-A

Fixed Price: 0.00  Vendor:

Default Units: 0  Parts Kit:

Comments: LOF - DEF - Tire Rotation - Chassis Lube - Brake Inspection

Display a gauge face on the main window

Created: 11/18/2012 2:36:51 PM by: Unknown Last Edit: 3/5/2018 12:48:17 AM by: Unknown

A Recurring Task Record

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## CUSTOMER GUIDE: Task Templates

### Adding Recurring Tasks to a Template

On the Recurring Task window, select the Schedule By option you need: by Usage, by Time, or by Both. If you want a reminder gauge displayed on the main window, check the box labeled "Display a gauge face on the main window." Next, set the Miles/Hours interval or calendar time interval, or both if you selected that option. Note that for calendar 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 will always use **Work Order**.

Enter a Type value or select a type from the droplist. The type helps to categorize your recurring tasks. Next, 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 there is a typical number of labor units required to perform this service, enter a Default Units value.

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 automatically as you ultimately complete the reminder(s) that this recurring task will create.

If no prior maintenance data exists for this task, select whether you want to use the Current Meter/Date, Purchase Meter/Date, or Zero when this recurring task creates the initial scheduled reminder. 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, or click Cancel to discard your entries.

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**CUSTOMER GUIDE: 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. 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.

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## CUSTOMER GUIDE: 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. This ensures that the reminders remain properly scheduled based on the intervals that you have defined on your recurring 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.



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### 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.

### *i* 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 using the Setup Vehicle Reminders window.

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

## CUSTOMER GUIDE: Task Templates

### Applying a Template to an Asset



Once you have defined your templates, you will need to *assign* the template(s) to your vehicle(s)/asset(s). To do this from the main window in FLEETMATE, right-click the vehicle and choose Apply Task Template...

The screenshot shows the FLEETMATE software interface. The 'Fleet Assets' table is active, displaying a list of vehicles. The selected vehicle is a white sedan (VIN: 0987654321). A context menu is open over this vehicle, and a red arrow points to the 'Apply Task Template...' option.

Veh No	Tag No	Unit No	Year	Make	Model	Type/Style	VIN	Operator	Location	Department
101	101	101	2004	CAT	EC25KE	Lft. Truck - Ele...	0987654321	E00003	Southern - Annapolis	Field Service
535-6	ABC 123	Able-22	2005	Ford	F-150	Pick Up			Eastern - Essex	Field Service
665-5	J889173	Easy-52	2002	Ford	E-250	Van			Eastern - Essex	Field Service

Date	Order	Odometer	Pri	Category	Completed	Order Total	Description	Serviced By
4/17/2019	FM-1000216	33521	1		Yes	109.43	Scheduled PM	Fleet Maintenance Department
2/4/2019	FM-1000211	33521	1		Yes	74.43	Scheduled PM	Fleet Maintenance Department
1/30/2017	FM-1000210	33021	1	Routine	Yes	20.00	Scheduled PM	Fleet Maintenance Department
3/23/2014	FM-1000209	33021	2	Routine	Yes	90.00	Scheduled PM	Fleet Maintenance Department
11/4/2013	FM-1000206	33021	1	Routine	Yes	30.00	Scheduled PM	Fleet Maintenance Department
7/29/2013	FM-1000205	31587	1	Routine	Yes	279.39	Scheduled PM	Fleet Maint Shop
3/1/2007	FM-1000181	25005	1	Routine	Yes	95.00	Scheduled PM	Fleet Maintenance Department
10/17/2006	FM-1000178	16755	1	Routine	Yes	72.63	Scheduled PM	Fleet Maintenance Department
1/22/2006	FM-1000077	12000	1	Routine	Yes	75.00	Scheduled PM	Fleet Maintenance Department
1/19/2006	FM-1000076	9002	1	Routine	Yes	126.65	Will Not Start	Fleet Maintenance Department
9/20/2005	FM-1000072	7000	1	Routine	Yes	168.65	Scheduled PM	Fleet Maintenance Department
8/4/2005	FM-1000071	3131	1	Routine	Yes	192.00	Unscheduled Service	Local Dodge Dealer

Main Window – Applying a Task Template

## CUSTOMER GUIDE: Task Templates

### Applying a Template to an Asset

An alternative method of doing this is to open the Setup Vehicle Reminders window, right-click the vehicle, then choose Apply Task Template.

Veh No	Tag No	Unit No	Year	Make	Model	Type/Style	VIN	Operator	Location
101	101	101	2004	CAT	EC25KE	Lift Truck - Ele...	0987654321	E00003	Southern - Anna
112-9	CKG 881	Fox-51	2005	Dodge	Neon	Coupe	7890123456789012	E00009	Headquarters - B
387-10	L712543	Baker-44	2004	Ford	F-550	Box Truck	67890123456789012	E00006	Headquarters - B
555-6	ABC 123	Able-22	2005	Ford	F-150	Pick Up	23456789012345678	E00001	Eastern - Essex
665-5	J889173	Easy-52	2002	Ford	E-250		234567	E00001	Eastern - Essex

Scheduled Reminders		Recurring Tasks					
	Miles Due	Hrs Due	Due By	Status	Type	Template	Reminder Description
	47850		6/5/2018	Pending	Scheduled PM	5000	PM-A
	72850		3/5/2019	Pending	Scheduled PM	5000	PM-B
	102850		3/5/2022	Pending	Scheduled PM	5000	PM-C

#### Applying a Task Template

Select the template to apply to the selected vehicle. Click OK to apply the template, or click Cancel. Once you click OK, the vehicle will inherit the recurring tasks from the template that you applied, and the related reminders will be scheduled.

Multi-select functionality is offered. This means that you can select more than one vehicle when you apply the template. The template will then be applied to all selected vehicles in one step.

If you do not see a template listed when you right click a vehicle, that means that the template has already been applied to the vehicle.