



# RECURRING TASKS

## Quick Reference Guide

### RECURRING TASKS – Managing Automation

Recurring Tasks for Conway Observatory

Create a Recurring Task
Recurring Tasks Reports

SUBJECT	HOW OFTEN	NEXT DATE	DESCRIPTION		
Subject	Daily	08/13/2020	Description	View	On/Off
Subject	Daily	08/12/2020	Description	View	On/Off
Mow Lawns	Weekly	08/19/2020	Mow the lawns weekly	View	On/Off
Check Status of Fuel and ...	Daily	08/12/2020	Check all consumables for low levels.	View	On/Off
Check fire extinguishers	Quarterly	11/09/2020	Check working order and valid use ...	View	On/Off

### QUICK REFERENCE

- /// A Recurring Task will create Work Orders at certain time intervals, enabling automation for the appropriate processes.
- /// Navigate to the **Recurring Tasks** log in the left menu in **Project Actions**.
- /// Use the **Create a Recurring Task** button to create the Recurring Task.
- /// After the create step, the current Recurring Task can be found in **Recurring Tasks** in the left menu.
- /// From the **Recurring Tasks** log, you can toggle tasks On or Off.
- /// You have the option to set the time interval for how often a work order will be created from this Recurring Task.
- /// Disabled tasks will appear grey in the log and will continue to update their dates, but will **NOT** create any work orders.

### Toggle Tasks On / Off

Use the On/Off button to disable tasks  
 Disabled Tasks will appear Grey

### CORRESPONDING WORK ORDERS

Recurring Tasks will Create **Work Orders** at regular intervals  
 For more information, refer to the [User Manual for Work Orders](#)

PROJECT	PROCESS ID	SUBJECT	DATE CREATED	STATUS
Project 1	WO - 00018	Recurring Task 1	06/30/2020 7:00 PM	Submitted
Project 1	WO - 00020	Recurring Task 1	07/01/2020 7:00 PM	Submitted
Project 1	WO - 00022	Recurring Task 1	07/02/2020 7:00 PM	Submitted
Project 1	WO - 00024	Recurring Task 1	07/03/2020 7:00 PM	Submitted

### WORKFLOW EXPLANATION

Recurring Tasks are used to automate Work Order creation.  
 Fields from the Recurring task get mapped to the work order field.

RECURRING TASK	MAPS TO	WORK ORDER
Subject	➤	Subject
Type	➤	Type
Priority	➤	Priority
Description	➤	Work Order Complaint
Time For Service	➤	Time For Service
Location Details	➤	Location Details
Requested On Behalf Of	➤	Requested On Behalf Of
Notes	Does not map	N/A