# Concept Training Manual For Concept Version 5.3 onwards

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## Creating a New Task in Concept

- 1. Log into Concept with your User ID and Password
- 2. Select Task Management in the bottom left hand corner
- 3. Select Advanced Helpdesk from the menu above
- 4. A new window will appear
- **TIP:** Any pale blue fields are mandatory, and you will need to fill these out before creating a new task. This guide will take you through how to do this

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個	Advanced Helpdesk	Tasks	🎦 Save 🔻	+ 🖶 Print 📅 🛛				No selection	Q				
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	Historic PPM Issues		Details (	Other									
٤	Issue PPMs			Q =	Phone		Raised	Date / Time					
R	PPMs		Reporter	V =	Reg. ID		Due By	Date / Time Date / Time	3				
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ä			Location	No selection C		No selection Q, No selection Q,	No. Staff	0					( ) ( )
			Priority	No selection C		No selection Q	Respond						
37			Contract	No selection C		No selection Q	Contain			10.4			<u></u>
			Problem	No selection		۹ 🗵	Finished						
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<u>@</u>	Work Permits						Time Zone	CET G					
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-			Cost Centre	No selection Q		No selection Q			_				
4	Facilities		Asset Code	No selection Q	Source	No selection Q				1			_
	Task Management												_/
-	Modules												_
==	System Administration												_
	«	~											

## Add/Update a Reporter and Add a Building to a Task

- 1. Start to Type the name of the person in the Reporter field
- **TIP:** If you type \* at the beginning you can search for the last name

Describer	louise parker	$\alpha = \mathbf{X}$
<u>Reporter</u>	Louise Parker-	
Email	Louise Parker-	
Building	Louise Parker (Training)-	0
	Items 1-3 out of 3	~
Location	No selection	Q
Priority	No selection	Q
Contract	No selection	Q

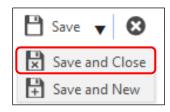
- 2. If the reporter is registered in Concept, they will appear in the drop-down list. Select the name and this will populate the relevant fields
- 3. If the reporter is not registered in Concept, click the **Reporter** label, and enter the details. See image below

💾 Save 🔻 🔇					No selection	n O
New Entity						
Detail	General	Employment	Additional No	tes / Needs	Communication Preferences	
Personnel Details						
First Name				Surname		
Title				Job Title		
Staff ID				Contact Class	No selection	Q
<u>Company</u>		No selection	Q	User Account	No selection	Q
Contact Details						
Office				Mobile		
Home				FAX		
Other				Bleeper		
Email1				Email2		
LDAP ID				Picture URL		
Address						
		0/100				.i.
Postcode				<u>Country</u>	No selection	Q

- 4. On the Detail tab, type into the following fields
  - a. First Name
  - b. Surname
  - c. Office (Phone number)
  - d. Email
- 5. Click onto the Employment tab

💾 Save 🔻 🔇						No selection	0
New Entity							
Detail	General	Employment	Additional No	tes / Needs	Communication F	Preferences	
Working in							
Department		No selection	Q	Dept Group		No department gr	oup
Element		No selection	Q	Manager		No selection	Q
Building		No selection	Q	Location		No selection	Q
Belonging to							
Department		No selection	Q	Dept Group		No department gr	oup
Cost Info							
Cost Centre		No selection	Q	Cost Code		No selection	Q

- 6. Look for the **Building** and pick from the list (remember you can use the \* to search)
- 7. Click onto the arrow next to **Save**
- 8. Choose Save and Close



- 9. Now you have created a reporter, you can start typing the Reporter and choose from the list (See step 1)
- 10. Check to see if the reporter Name, Email, Phone Number and Building are showing
- **TIP:** If the building is not showing click into this field and select the building from the list. This is covered in the guide
- 11. Your Task should look similar to the image below

🂾 Save 🔻	+ 🖶 Print 📑 😵				No selection	(
New Ent	iity					
Details	Other			Raised	Date / Time	Ē
Reporter	louise parker 🔍 🚍	Phone	0123456789	Due By 🔒	Date / Time	<i>i</i>
Email	louise.parker@macegroup.com	Req. ID		Scheduled	Date / Time	
Building	Demo-02 - Office A Demo Q	Department	No selection Q	Est Time	0 : 00	
.ocation	No selection Q	Category	No selection Q	No. Staff	0	
riority	No selection Q	Discipline	~	Respond		
-	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~	Attend Contain		
Contract		LoC	~			
roblem	No selection		۵ 🗙	User		
				Time Zone	GMT	Q
2				- <u>Compliance</u>	No selection	Q
<b>U</b>				<ul> <li>User Defined</li> </ul>	No selection	Q
	0/4000		i.			
ault Code	No selection Q	Serv.Type	Non Service Call			
Cost Centre	No selection Q	Cost Code	No selection Q			
Asset Code	No selection Q	Source	No selection Q			

- 12. To finish off this section you need to choose a Location
- 13. Click into the Location field and choose a location

# Add a Problem and Description to a Task

- Now you have added the Reporter details, Building and Location, you need to select the Problem from the drop-down list. This will be a summary of the fault the reporter is experiencing
- 2. Click into the Problem drop down list and start typing one or two words

Problem	*too hot	αX
	Radiator - Radiators too hot, temperature needs to be turned down -	
	tems 1-1 out of 1	
i		

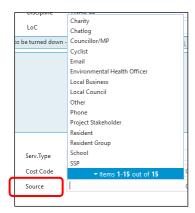
- 3. Select the Problem that is relevant
- 4. This will populate the following fields
  - a. Category
  - b. Priority
  - c. Discipline
  - d. Contract

💾 Save 🔻	🕂 🖶 Print 📑 😧				No selection	Q
New Enti	ty					
Details (	Other					
				Raised	Date / Time	<b>Ö</b>
Reporter	louise parker 🔍 🚍 🔀	Phone	0123456789	Due By 🔂	Date / Time	<b>ë</b>
Email	louise.parker@macegroup.com	Req. ID		Scheduled	Date / Time	
Building	Demo-02 - Office A Demo	Department	No selection Q	Est Time	0 : 00	
Location	- 2nd Floor - O	Category	HVAC Q	No. Staff Respond	0	
Priority	P3 Q	Discipline	HVAC-22 Q	Attend		
Contract	Demo Q	LoC	No selection Q	Contain		
Problem	Radiator - Radiators too hot, temperature needs to	be turned down	- م 🗙	Finished		
				User		
i				Time Zone	GMT	Q
9				Compliance	No selection	Q
	Type in a descrip	tion of th	ne problem here	User Defined	No selection	Q
	· · · · · ·					
	0/4000					
Fault Code	No selection Q	Serv.Type	Non Service Call			
Cost Centre	No selection Q	Cost Code	No selection Q			
Asset Code	No selection Q	Source	No selection Q			

5. Click into the large area under the Problem and enter a description of the issue. You can copy and paste into here, but you need to limit to 1500 characters

## Add a Source

1. Select **Source** at the bottom middle of the Task page, this will bring up a list of the contact types



2. Choose one of these from the list

# Saving a New Task

Now you have completed the steps above, you are ready to save the task

1. Click onto the Save icon at the top of the screen



2. The Task will save and create a Task ID number

<b>Fask</b>	s	🂾 Save 🔻	🕂 🖶 Print 🛇 Mark	as Complete y	••• Actions	▼ Ø			No selection	n	
Ĭ	General	834304							tatus: Not Applied	$\sim$	
Ξ	Actions										
2	Events	Details	Other					Raised	27/01/2021 18:13 GMT	۲	
ŧ	Resources	Reporter	louise parker	_ Q ⊒, ⊠	Phone	0123456789		Due By 🔒	27/01/2021 18:13 GMT	۲	
	Time Records	Email	louise.parker@macegroup.com	n	Req. ID			Scheduled	Date / Time	<i>i</i>	
<u>3</u>	Work Permits	Building	Demo-02 - Office A Demo	Q	Department	No selection	Q	Est Time	0 : 00		
	Financials	Location	- 2nd Floor -	Q	Category	HVAC	Q	No. Staff Respond	1		
Ş	Associate Tasks	Priority	P3	Q	Discipline	HVAC-22	Q	Attend	-		
ŧ.	Multiple Reporters	Contract	Demo	Q	LoC	No selection	Q	Contain	-		
D	Stock	Problem	Radiator - Radiators too hot, te	emperature needs	to be turned dow	vn -	۹ 🗙	Finished User	-		
	Tasks List		This is a test task for training p	urposes				Time Zone			
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1	Task Periods	Fault Code	No selection	Q	Serv.Type	Non Service Call	$\sim$				
	Notes	Cost Centre	No selection	Q	Cost Code	No selection	Q				
		Asset Code	No selection	Q	Source	Other	Q				
	ncials										
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## How to Add a Resource

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General	834304							Status: ACTIVE Lock Status: Not Applied	$\sim$
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Events	Filter By 🔘	Standard ODisc	ipline				Raised	27/01/2021 18:13 GMT	۲
Resources	Comments	•	Name	1	Phone	Mo	bi Due By	27/01/2021 18:13 GMT	<b>i</b>
Time Records	<u> </u>		Demo Supplier				Schedul		<i>.</i>
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Multiple Reporters							Contain		
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Stock							User	-	
Tasks List							V Time Zo	one GMT	
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CSF Audit	( Page	1 (•) (•) 1 to 1	l of 1		ټ	• 🖶 🖩 🕾	User De	efined No selection	
り Identity Scans	Created By	Created Date	Resource	Telephone No.	Date Started	Total Hrs			
Multiple Locations							^		
Regulations									
Task Periods									
Notes									
inancials									
Expenses									
Purchase Orders									
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1. From the menu on the left of the screen, select Resources

2. You have two ways to filter the list of resources; Standard and Discipline



- 3. **Standard** will show all resources and **Discipline** will only show resources who have the same Discipline as the task
- 4. Double click the resource from the top half of the screen. (In the example below there is only one available resource)

Task	5	🕂 New 🗵 🛍 😂 😂 💿 🔇	) 🖪 🙊 🖷				No selection	Q
Ē	General	834304					s: ACTIVE Status: Not Applied	$\sim$
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	Events	Filter By	2			Raised	27/01/2021 18:13 GMT	<u>i</u>
2	Resources	Comments *	Name	Phone	Mobi	Due By 🔂		<b>Ö</b>
•	Time Records	2	Demo Supplier			Scheduled		
Ô	Work Permits					Est Time No. Staff	0 : 00	
	Financials					Respond	-	
ð	Associate Tasks					Attend		
÷.	Multiple Reporters					Contain Finished	-	
C	Stock					User	-	
	Tasks List					Time Zone		
0	SLA Times	<			>	Compliance	No selection	Q
4	CSF Audit	H Page 1 H 1 to 1 of 1		5 <b>e</b> III	≋≣⊧	User Defined	No selection	Q

5. From the pop-up window click **Save and Close** 

New Entity								Task ID 834	304
Time Records	Note	s							
ask Details									
Resources		Demo-00-0	I - Demo Supplier		Task ID		834304		
Include all the supplie	r's resources?				ID Number		Demo-00-0	1	
Date Scheduled		Date / Time	<i>i</i>		Time Records Ref				
Date Started		Date / Time	<i>i</i>		Date Contacted		Date / Time		ġ
Est Time		0 : 00			Date Contained		Date / Time		ġ
Assignment Type		No selection	ı	Q	Est Travel Time		0 : 00		
Status		No selection	ı	Q					
osts									
Core Time	0 : 0	0	O/T Rate 1		0 : 00	O/T Rate 2		0 : 00	
O/T Rate 3	0 : 0	0	Travel		0 : 00	Wait		0 : 00	
Divert	0 : 0	0	Parking		0 : 00	Total		0 : 00	
Vehicle Cost		0.00	Mileage Cost		0.00	Distance Tr	avelled		C
otal Cost Info									
Date Finished		Date / Time	<i>i</i>		Downtime		0 : 00		
Expense Cost		0.00			Calculated Cost		0.00		
Time between start an	d finish	0 : 00			Resolution		No selectio	n	

- 6. The Task status has changed to Assigned (top right corner)
- 7. In the Resource window a new **Time Record** has been created for the Resource you have selected (bottom half of the screen).

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٤	Resources		Comments -		Name		Phone		Mo	bi	Due By 🔒	27/01/2021 18:13 GMT	<i>i</i>	
-	Time Records	2			Demo Supplier					^	Scheduled	Date / Time	<i>i</i>	
٨	Work Permits										Est Time	0 : 00		
	Financials										No. Staff	1		
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. <b>.</b>	CSF Audit	H	Page	1 P 1 to 1 of	1			ة ت	∰ 8	≣l	User Defined	No selection		Q
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8	Task Periods													
Ĩ	Notes													
Fina	ncials													
£,	Expenses													
Ð,	Purchase Orders													
8		<								>				
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8. From this point you can close the task by using the **Close** Icon <sup>(2)</sup> from the toolbar at the top of the screen

Created Friday, 13 August 2021 Author, Louise Parker

# How to Access the Task Grid

The Task Grid is used to allow users to find task(s) that have been created. There are many search options that a user can use to enable them to locate a desired task.

- 1. Click Task Management from the bottom left corner
- 2. Click Tasks on the menu above

Task Management	Task	s Events Documents	Hazards								
Tasks	+ N	lew 🔟 🕄 🖨 Print 🗸 🖊	Assign 🔻 🐉 S	tatus 🔻 🕶 A	ctions 🔻 🖾 Op	en Task Navigator					
Advanced Helpdesk	All cor	ntract groups		Q	All resources			Q, All resource	teams		
Helpdesk					(	Query All C	Open Tasks				~ 🕋
Historic PPM Issues		Level Of Completion	Seq =	Task ID	Task Type	Task Reported Date	Task Due By Date	Finish Date	Name	Code	Building
Issue PPMs											
PPMs											
PPM Planner	Û		1496312	834420	BREAKDOWN	28/01/2021 09:42 GMT	01/02/2021 09:42 GMT		Mace	Mace-HQ	Moorgate
PPM Planner Report	B		1496311	834419	PPM	01/09/2020 23:59 GMT	29/09/2020 23:59 GMT		EAL	EAL-04	South Stat
Planned Task Events	÷.		1496310	834418	PPM	01/09/2020 23:59 GMT	29/09/2020 23:59 GMT		EAL	EAL-02	North Stat
Resource Planner Scheduled Task Templates	8	Logged	1496309	834417	BREAKDOWN	28/01/2021 10:42 CET	25/02/2021 10:42 CET		Colt Italy	COLT-IT04	Roma, Via
Timesheets	8	Logged	1496308	834416	BREAKDOWN	28/01/2021 09:38 GMT	01/02/2021 09:38 GMT		Mace	Mace-HQ	Moorgate
Work Permits	÷.	Logged	1496307	834415	BREAKDOWN	28/01/2021 09:15 GMT	30/01/2021 01:15 GMT		Whitfield	Whitfield-05	60 Whitfie
	£	Logged	1496306	834414	BREAKDOWN	28/01/2021 14:14 PKT	03/02/2021 09:14 PKT		PAKISTAN	PKP00069	Al-Babar I
	÷.	Task Assigned	1496304	INVPS:3587	BREAKDOWN	28/01/2021 09:11 GMT	29/01/2021 09:11 GMT		INVESCO UK	INV-UK-PS	Portman
	£.	Awaiting quote	1496293	834413	BREAKDOWN	28/01/2021 08:58 GMT	30/09/2022 16:58 GMT		Scotland East	2057	CPS Livin
Favourites	÷.	Awaiting quote	1496292	834412	BREAKDOWN	28/01/2021 08:59 GMT	11/02/2021 08:59 GMT		North Central	1250	CPS Dront
Settings	Ê.	Task Assigned	1496291	INVIH:5961	BREAKDOWN	28/01/2021 08:57 GMT	28/01/2021 12:57 GMT		INVESCO UK	INV-UK-IH	Valleys
Facilities	Ê.	Logged	1496290	834411	BREAKDOWN	28/01/2021 08:55 GMT	11/02/2021 08:55 GMT		South Wales, Avon & Glos	537	CPS Bristo
Task Management	-		1496286	834407	RREAKDOWN	28/01/2021 08:49 GMT	11/02/2021 08:49 GMT		Mace Aftercare Project	MAC-FV-02	2 Fortune
Modules											
Modules System Administration		Logged	1496285	834407	BREAKDOWN	28/01/2021 08:49 GMT 28/01/2021 16:47 CST	11/02/2021 08:49 GMT 05/02/2021 13:47 CST		Mace Aftercare Project	MAC-EV-02 APACCNSGHB2	2 F 5G

3. From here you will see the tasks within the buildings and contracts you work in. There are many ways you can search. These are listed in this guide.

# How to Search the Task Grid

#### **Contract Groups**

If you work in or manage more that one Contract you can choose to see part of the data. Concept uses Contract Groups to separate data.

Settings	Tasks Events Documents	Hazards								
Assets	+ New 🔟 🗯 🖶 Print 🔻	Assign 👻 🚦 !	Status 🔻 🚥 /	Actions 🔻 🖾 0	een Task Navigator					1
Attributes	Demo, All - Demo All		Q,	All resources			Q, All resource	i teams		0
Authorisation	Rech				Q Quetry No selec	ction				~ 🖴 🖊
Contacts	Level Of Completion	Seq	Task ID +	Task Type	Task Reported Date	Task Due By Date	Finish Date	Name	Code	Building
Contracts										
Customer Satisfaction Forms							06/02/2020 10:49			
Documents Setup	Task Complete	1048640	714869	BREAKDOWN	06/02/2020 10:37 GMT	06/02/2020 14:52 GMT	GMT	Macro	Demo-02	Office A Dem
Event Types	Logged	1462414	832618	PPM	15/11/2015 23:59 GMT	13/12/2015 23:59 GMT		Macro	Demo-02	Office A Dem
Facility Booking	Started	1462416	832619	РРМ	15/05/2016 23:59 GMT	12/06/2016 23:59 GMT		Macro	Demo-02	Office A Dem
Finance FSI GO	Accepted	1462417	832620	PPM	15/11/2016 23:59 GMT	13/12/2016 23:59 GMT		Масто	Demo-02	Office A Dem
General	Completed	1462418	832621	PPM	15/05/2017 23:59 GMT	12/06/2017 23:59 GMT	21/01/2021 20:01 GMT	Масто	Demo-02	Office A Den
Hazard Types	Started	1462419	832622	PPM	15/11/2017 23:59 GMT	13/12/2017 23:59 GMT	GMT	Macro	Demo-02	Office A Den
III Projects	Started	1462420	832623	PPM	15/05/2018 23:59 GMT	12/06/2018 23:59 GMT		Macro	Demo-02	Office A Den
Property & Estates										
Purchase Orders	Started	1487589	833757	PPM	15/05/2020 23:59 GMT	12/06/2020 23:59 GMT		Macro	Demo-02	Office A Den
•	Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro	Demo-02	Office A Derr
Favourites	E Logged	1497730	834641	BREAKDOWN	28/01/2021 16:16 GMT	28/01/2021 16:16 GMT		Macro	Demo-02	Office A Dem
Settings										
Facilities										
Task Management										
Modules										
System Administration		_								
	H + Page 1 + H 1 to 10	of 10							388	5 FL C

- 1. Click into the All Contract Groups Field (top left)
- 2. Type in the contract group you want to view
- 3. Select a Contract Group from the list
- 4. Click Refresh 2
- 5. The grid will only show any task that is in this contract group.
- **TIP**: you can see the total amount of tasks available at the bottom of the screen. It will only show you 25 tasks per page, so you may need to use further filters to reduce this number

#### Quick Search

Quick search is a quick way of looking for a task or group of tasks. Although this is quick, it may return many tasks as this searches across multiple columns.

*	Concept Evolution									Ç	🤋 👩 ?	💿 🏫
	Settings	Tas	iks Events Documents	Hazards								
	Assets	+	New 🗶 😂 🖶 Print 🗸 🖊	Assign 🔻 📱 Si	iatus 🔻 🚥 Ad	tions 🔻 छ Op	en Task Navigator					т
۲		Dem	io_All - Demo All			All resources			Q. All resourc	e teams		Q
50	Authorisation	sortie	ng			(	Query No select	tion				× 🕋 🔺
	Contacts	<u> </u>	Level Of Completion		Task ID		Task Reported Date	Task Due By Date		Name	Code	
1	Contracts		Level Of Completion	Seq	lask ID 🗚	Task Type	Task Reported Date	Task Due By Date	Finish Date	Name	Code	Building
.#.	Customer Satisfaction Forms											
1.	Documents Setup	Ē	Logged	1497730	834641	BREAKDOWN	28/01/2021 16:16 GMT	28/01/2021 16:16 GMT		Macro	Demo-02	Office A Demo
<b>,</b>	Event Types											
6	Facility Booking											
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	System Administration	۲.										>
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- 1. Click and type a key word into the Search field
- 2. Click Refresh 2
- 3. Any tasks that match this entry will appear in the task grid

#### Query

Query is a pre-written filter that you can use to view specific tasks in the task grid. You must remember that queries that are used will remain active until you remove them. This means if you log off and log back into Concept on another day, the query will still be running. The instructions below will show you how to apply and remove queries.

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۲	Attributes	Demi	o_All - Demo All		Q	All resources	/	Q, All resource teams	Q.
50	Authorisation						Q Query	No selection	
	Contacts							System Queries	^
10	Contracts		Level Of Completion	Seq	Task ID .	Task Type	Talk Reported Da	Active / Assigned Tasks Invesco	ding
	Customer Satisfaction Forms							Active Call Logging Tasks Active PPM Tasks	
	Documents Setup	Đ.	Logged	1497730	834641	BREAKDOWN	21/01/2021 16:16	Active Tasks Published Buildings	ce A Lemo
, m	Event Types							All Open Tasks all Open Tasks - Excluding Cancelled or Rejected	
67	Facility Booking							All PPM Tasks	
1.5	Finance							All Reactive Tasks except Cancelled	
	FSI GO							All Reactive Tasks Include Closed Assigned Call Logging Tasks	
×	General							Assigned Can cogging has a	
A	Hazard Types							Assigned Tasks	
	Projects							Call logging tasks logged in the last week Call Logging tasks signed off in the last week	
0	Property & Estates							Cancelled PPM Tasks	
e.	Purchase Orders							Cancelled Tasks	
	Decausees							Completed Tasks Copy of My Open Tasks	
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Û	Task Management								
-	Modules								
=	System Administration	۲.							*
	«	Э	Page 1 H 1 to 1 of	1					9 C 1 = # # # C 0

- 1. Click into the Query field
- 2. From the drop-down list click onto a query
- 3. The task grid will now show tasks(s) that match the selected query criteria

	ew   🗶   🤁   🖶 Print 🔻 🎢 All - Demo All	Hazards Assign 🔻 暮 St	atus 🔻 🚥 Ac							
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			Q	All resources			Q All resource	teams		0
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	Level Of Completion	Seq	Task ID 🔺	Task Type	Task Reported Date	Task Due By Date	Finish Date	Name	Code	Building
-										
	Logged	1462414	832618	PPM	15/11/2015 23:59 GMT	13/12/2015 23:59 GMT		Macro	Demo-02	Office A Der
Û.	Started	1462416	832619	PPM	15/05/2016 23:59 GMT	12/06/2016 23:59 GMT		Macro	Demo-02	Office A Der
Ê.	Accepted	1462417	832620	PPM	15/11/2016 23:59 GMT	13/12/2016 23:59 GMT		Macro	Demo-02	Office A Der
8	Started	1462419	832622	PPM	15/11/2017 23:59 GMT	13/12/2017 23:59 GMT		Macro	Demo-02	Office A De
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в	Started	1462420	832623	PPM	15/05/2018 23:59 GMT	12/06/2018 23:59 GMT		Macro	Demo-02	Office A Der
Ê	Started	1487589	833757	PPM	15/05/2020 23:59 GMT	12/06/2020 23:59 GMT		Macro	Demo-02	Office A Der
Ê.	Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro	Demo-02	Office A Der
	Innered	1407720	024641	PREAKDOWN	28/01/2021 16-16 GMT	29/01/2021 16-16 GMT		Massa	Dame 02	Office A Der
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   833737         PFM           Logged         149383         81414         882ADOWN           Logged         149770         83441         882ADOWN	Started         1402415         E32619         PPM         15/05/2018 23:99 GMT           Accepted         1402417         E32620         PPM         15/11/2018 23:99 GMT           Started         1402419         E32622         PPM         15/11/2017 23:99 GMT           Started         1402419         E32622         PPM         15/11/2017 23:99 GMT           Started         140240         E32623         PPM         15/05/2018 23:99 GMT           Logged         1407398         E3404         E8EAKDOWN         22/07/0211 16:16 GMT           Logged         1497790         E34641         E8EAKDOWN         22/07/0211 16:16 GMT	Stated         148245         83269         PM         1505/2016 23.95 GMT         1206/2016 23.95 GMT           Accepted         148247         83260         PM         1517/2016 23.95 GMT         117/12/016 23.95 GMT      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       11/11/2016/23.95 0MT         Maces           Started         1442417         82830         PFM         13/11/2016/23.95 0MT         11/11/2017/23.95 0MT         Maces           Started         1442437         82823         PFM         13/11/2017/23.95 0MT         13/11/2017/23.95 0MT         Maces           Started         1442430         82823         PFM         15/05/2018/23.95 0MT         13/06/2018/23.95 0MT         Maces           Started         1442436         82823         PFM         15/05/2018/23.95 0MT         13/06/2018/23.95 0MT         Maces           Started         1442438         82337         PFM         15/05/2018/23.95 0MT         13/06/2018/23.95 0MT         Maces           Logged         1493983         83414         884ADOWN         2/07/022118.13 0MT         Maces           Logged         1497700         83441         884ADOWN         2/07/022116.16 0MT         2/07/022118.16 0MT         Maces	Stated         142416         82519         PPM         1500/2012/239 0MT         12/00/2012/239 0MT         More         Demo-R2           Accepted         142417         82520         PPM         15/10/2012/239 0MT         11/12/2014/239 0MT         More         Demo-R2           Stated         142420         82522         PPM         15/10/2012/239 0MT         11/12/2017/239 0MT         More         Demo-R2           Stated         142420         82523         PPM         15/10/2012/239 0MT         12/0/2012/239 0MT         More         Demo-R2           Stated         142420         82523         PPM         15/0/2012/239 0MT         12/0/2012/239 0MT         More         Demo-R2           Stated         142739         82377         PPM         15/0/2012/239 0MT         12/0/2012/239 0MT         More         Demo-R2           Logged         149383         83404         882AD0/WN         2/0/2021/1613 0MT         2/0/2021/1613 0MT         Mace         Demo-R2           Logged         169770         83441         882AD0/WN         2/0/2021/1616 0MT         Mace         Demo-R2

- 4. The query will remain working until it is removed
- 5. To remove the query, click into the **Query** field
- 6. Scroll upward to find No Selection and click onto it



7. The task grid will refresh automatically and remove this query

#### Specific Data Search

Doing a specific data search is a more efficient way of finding a task(s). For example, if you want to find a specific Task ID or show tasks for a certain building, you can enter data into these fields. Any column with a filter box underneath can be used to search for data. Some fields do not have this field, so cannot be searched.

Remember your Task Grid has many columns and you may need to scroll across the screen to view more tasks.

Settings	+ New 1 0 6 Pr	LAND I	8							т	
Assets		int 🔻 🎮 Assign 👻			open task Navigator						
Attributes	Demo_All - Demo All		Q	All resources			Q All resource	tearns		Q	
Authorisation Contacts	1000C			1	C POINT HORE	ection	· · · · · · · · · · · · · · · · · · ·				
	Level Of Completion	Seq	Task ID -	Task Type	Task Reported Date	Task Due By Date	Finish Date	Name	Code	Building	
Contracts											
Customer Satisfaction Forms Documents Setup	Task Complete	1048640	714869	BREAKDOWN	06/02/2020 10:37 GMT	06/02/2020 1:52 GMT	05/02/2020 10:49	Macro	Demo-02	Office A Demo	
Event Types	-	1462414		PPM	15/11/2015 23:59 GMT	13/12/2015 23:59 GM	GMT	Macro		Office A Demo	
Facility Booking	Logged	1462414	832618	PPM	15/11/2015 23:59 GMT	13/12/2015 23:59 GM		Macro	Demo-02	Office A Demo	
Finance	Started	1 100					<b>T</b> 1 10	-		<b>T</b> 1 <b>D</b> .	
FSI GO	Accepted	Level Of 0	Completion		Seq		Task ID ▲		ask Type	Task Reported	I Date
General	Completed										
	1.										
Hazard Types	Started										
	Started										
Projects	Started     Started	Latran	930003	P 6 101	12/02/2010 23:20 0001	16700-2010-23-270001		macro	nemora	SHILE A VEDU	
Projects Property & Estates	Page 10 - 100	1402509	833757	PPM	13/05/2020 23:59 GMT	12/06/2020 23:59 GMT		macro Macro	Demo-oz	Office A Demo	
Projects Property & Estates Purchase Orders	Started	1462423 1487589 1493893	833757 834304	PPM PPM BREAKDOWN	15/05/2020 23:59 GMT 27/01/2021 18:13 GMT	12/06/2020 23:59 GMT 22/06/2020 23:59 GMT 27/01/2021 18:13 GMT		Macro Macro	Demo-02 Demo-02	Office A Demo Office A Demo	
Projects Property & Estates Purchase Orders	Started Started Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro	Demo-02	Office A Demo	
Projects Property & Estates Purchase Orders Parchase Transmission Favourites	Started										
Projects Property & Estates Parchase Orders Favourites Settings	Started Started Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro	Demo-02	Office A Demo	
Projects Projects Property & Estates Parchase Orders Favourites Settings Facilities	Started Started Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro	Demo-02	Office A Demo	
Projects Projects Projects Projects Parchase Orders Parchase Orders Parcharee Orders Parcha	Started Started Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro	Demo-02	Office A Demo	

- 1. Click into the field below the Column header
- 2. Here you can either scroll through the list and pick or type into this field
- 3. For example, to look for a Task ID, click into the field below Task ID
- 4. Type in the task ID
- 5. Click Refresh 2
- 6. To look for a building, navigate to the filter under **Building**
- 7. Type the name of the building or use the \* to search any part of this field.
- 8. If you want to look for a task(s) raised in a time period, navigate to the relevant date field search box

#### 9. You will see a **From** and **To** field

Task Reported Date	Task Due By Date	0	Jan		~ 20	21	$\sim$	0
		Su	Мо	Tu	We	Th	Fr	Sa
T	T						1	2
		3	4	5	6	7	8	9
	-	10	11	12	13	14	15	16
0 From	о — — — — — — — — — — — — — — — — — — —	17	18	19	20	21	22	23
		24	25	26	27	28	29	30
		31						

- 10. Click onto the calendar icon to input the date(s)
- 11. Click Refresh 3

# How to Filter the Task Grid

Concept will allow you to filter your tasks in an ascending or descending order. For example, if you want to see tasks in order of date logged, you can sort in a descending order, so you see your newest tasks at the top of the list.

	Level Of Completion	Seq	Task ID	Task Type	Task Reported Date 🔺	Task Due By Date	Finish Date	Name
				T	T		T	1
Ē	Logged	1462414	832618	PPM	15/11/2015 23:59 GMT			<b>.</b> .
Ē	Started	1462416	832619	PPM	15/05/2016 23:59 GMT	Task Reported Date 🔺		
Û	Accepted	1462417	832620	РРМ	15/11/2016 23:59 GMT			
Û	Completed	1462418	832621	РРМ	15/05/2017 23:59 GMT	12/06/2017 23:59 GMT	21/01/2021 20:01 GMT	Macro
Ē	Started	1462419	832622	PPM	15/11/2017 23:59 GMT	13/12/2017 23:59 GMT		Macro
Û	Started	1462420	832623	РРМ	15/05/2018 23:59 GMT	12/06/2018 23:59 GMT		Macro
Ē	Task Complete	1048640	714869	BREAKDOWN	06/02/2020 10:37 GMT	06/02/2020 14:52 GMT	06/02/2020 10:49 GMT	Macro
Ē	Started	1487589	833757	PPM	15/05/2020 23:59 GMT	12/06/2020 23:59 GMT		Macro
Û	Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27/01/2021 18:13 GMT		Macro
Ē	Logged	1497730	834641	BREAKDOWN	28/01/2021 16:16 GMT	28/01/2021 16:16 GMT		Macro

 Click onto the column name and you will see a black triangle pointing upwards. This is sorted in Ascending order and the oldest task will be at the top of the list

2. Click again and the triangle will point down. This is sorted in Descending order and the newest task will be at the top of the list

	Level Of Completion	Seq	Task ID	Task Type	Task Reported Date +	Task Due By Date	Finish Date	Name
				T	Ť		T	T
Û	Logged	1497730	834641	BREAKDOWN	28/01/2021 16:16 GMT	28		
Ē	Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	2 Task Re	eporte	d Date 👻
Ē	Started	1487589	833757	PPM	15/05/2020 23:59 GMT	12	•	
Ē	Task Complete	1048640	714869	BREAKDOWN	06/02/2020 10:37 GMT	06/02/2020 14:52 GMT	06/02/2020 10:49 GMT	Macro
Ē	Started	1462420	832623	PPM	15/05/2018 23:59 GMT	12/06/2018 23:59 GMT		Macro
Ē	Started	1462419	832622	PPM	15/11/2017 23:59 GMT	13/12/2017 23:59 GMT		Macro
Û	Completed	1462418	832621	PPM	15/05/2017 23:59 GMT	12/06/2017 23:59 GMT	21/01/2021 20:01 GMT	Macro
Û	Accepted	1462417	832620	PPM	15/11/2016 23:59 GMT	13/12/2016 23:59 GMT		Macro
Ē	Started	1462416	832619	PPM	15/05/2016 23:59 GMT	12/06/2016 23:59 GMT		Macro
<u>i</u>	Logged	1462414	832618	PPM	15/11/2015 23:59 GMT	13/12/2015 23:59 GMT		Macro

• TIP: You can perform this filter on most column headers. Ascending is A-Z and Descending is Z-A

# How to Export the Task Grid

Task data can be exported from Concept and into Microsoft Excel. This forms a .CSV file which you can save as an Excel workbook.

- 1. Click onto the **Export to CSV** icon  $\stackrel{\diamond}{\frown}$  on the bottom right corner of the screen
- 2. Depending on the number of tasks you have in the Task Grid, this could take a few seconds to a few minutes.
- 3. From the pop-up window choose Open With and select Microsoft Excel

Opening Export.csv		×
You have chosen t	o open:	
🛛 Export.csv		
which is: Mi	crosoft Excel Comma Separated Values File (5.8 kB)	
from: https:/	//macro123.com	
What should Firef	iox do with this file?	
Open with	Microsoft Excel 🗸 🗸	
○ <u>S</u> ave File		
Do this <u>a</u> uto	matically for files like this from now on.	
	OK Cancel	

- 4. Click OK
- 5. This process will open Excel and from there you can save this as an Excel Workbook

# How to Change the Time on a Time Record

1. From the Task Grid find the task and open

Tasks	💾 Save 🔻	🕂 🖶 Print 🖉 Mark as Com	plete 🔻 👓 Ac	tions 🔻 😣			No selection Q
📋 General	834641					Status: As	SIGNED us: Not Applied V
Sections							Hot ippica
Events	Details	Other				Raised	28/01/2021 16:16 GMT 🖉
2 Resources	Reporter	TEST Q 🚍	Phone			Due By 🗟	28/01/2021 16:16 GMT 👜
Time Records	Email		Req. ID			Scheduled	Date / Time 📋
🙆 Work Permits	Building	Demo-02 - Office A Demo	Department	No selection	Q	Est Time	0 : 00
Financials	Location	- SITE - Q	Category	Facilities Services	Q	No. Staff Respond	1
Associate Tasks	Priority	P3 Q	Discipline	Fac. Srvcs-06	Q	Attend	-
Multiple Reporters	Contract	Demo Q	LoC	Logged	Q	Contain	
	Problem	Administrative Tasks - Filing/Sorting -			<u>م X</u>	Finished	
-		TEST				User	-
Tasks List	i				•	Time Zone	GMT
SLA Times	2					Compliance	No selection Q
						User Defined	No selection Q
Identity Scans							
Multiple Locations		4/4000			.:1		
Regulations			1		~		
🐻 Task Periods	Fault Code	No selection Q		Non Service Call	_		
Notes	Cost Centre	No selection Q		No selection	Q		
Financials	Asset Code	No selection Q	Source	No selection	Q		
~ ~							

#### 2. Go to the Resources menu

Task	(S	+	New 🖊	) C O O O	🕒 🙊 🖷				No	selection	Q
Ē	General	Ι,	834641						Status: AS	SIGNED us: Not Applied 🗸	
三	Actions								LOCK Stat	us: Not Applied	
2	Events	Filter B	By 💿 St	andard O Discipline	•				Raised	28/01/2021 16:16 GMT	Ö
۲	Resources		Comments *		Name		Phone		Due By 🔒	28/01/2021 16:16 GMT	<i>(</i>
	Time Records	2			Demo Supplier			^	Scheduled	Date / Time	<i>(</i>
ŵ	Work Permits								Est Time	0 : 00	
-									No. Staff	1	
1	Financials									-	
Ô	Associate Tasks								Attend Contain	-	
	Multiple Reporters								Finished	-	
C	Stock	<			_			~	User	-	
	Tasks List	(H)	4 Page	1 () (H) 1 to 1 of 1			3 ∰ ∰ 3		Time Zone		
Ò	SLA Times		Created By	Created Date	Resource	Telephone	Date Started	To	Compliance	No selection	Q
. <b>#</b> .	CSF Audit	_				No.	Date Started		User Defined	No selection	Q
( ا	Identity Scans		19953	29/01/2021 15:34	Demo Supplier			0.0 ^			
2	Multiple Locations										
.▲	Regulations										
8	Task Periods										
Ē	Notes							~			
Fina	incials	۲						>			
	«	H	Page	1			5 🖶 🖽 S	i i			

3. Open the **Time record**; double click or click onto the Time Record icon 🏶

Time Record Details	💾 Save 🔛 Save ar	nd Close	🕂 Sav	e and New	1	• 🕒	٨						
计 General	Demo Supplier									Ta	sk ID 8	34641	
Expenses				_									
System	Time Records	;	Notes										
Audit Trails	Task Details												
Properties	Resources		Demo-0	0-01 - Demo Si		Task	ID						
Documents	Include all the supplie resources?	er's				ID Nu	umber			Demo	-00-01		
A Hazards	Date Scheduled		Date / T	ïme	<i>1</i>	Time	Records	Ref					
Audit Trails	Date Started		Date / T	ïme	<i>.</i>	Date	Contacte	ed		Date /	Time		
Audit Trails	Est Time		0	00		Date	Containe	ed		Date /	Time		<b></b>
Events	Assignment Type		No selec	tion	Q	Est Ti	ravel Tim	e		0	: 00		
Events	Status		No selec	tion	Q,								
	Costs												
	Core Time	0 :	00	O/T Rate 1		0	0	Jan		~ 20	21	$\sim$	0
	O/T Rate 3	0 :	00	Travel		0							
	Divert	0 :	00	Parking		0	Su	Мо	Tu	We	Th	Fr	Sa
	Vehicle Cost		0.00	Mileage Co	st							1	2
	Total Cost Info						3	4	5	6	7	8	9
	Date Finished		Date / T	ïme	<i>i</i>	Dow	10	11	12	13	14	15	16
	Expense Cost		0.00			Calc	17	18	19	20	21	22	23
	Time between start a	nd finish	0 :	00		Reso	24	25	26	27	28	29	30
							31						
~													

- 4. Click the Calendar icon next to the Date Finished field
- 5. Select the Date and Time
- 6. Click your mouse away from this window (any white area of the time record window)



- 7. The date and time will now be entered into the field
- 8. Click Save and Close



# How to View and Add a Notes to a Task

Notes will allow you to add some extra details or what has been done to resolve the task. This may be sent to the reporter when the Task is closed.

ه 🍅	34641 - Mozilla Firefox							– 🗆 X	
0	A 25 https://macro1	23.com/ukcond	cept/!System/Tasks/F_TASKS/Viev	vF_TASKSIte	em.aspx?_	referrer=%2fukconcept%2flSyste	m%2fTasks%2fF_TA	110% ··· ♡☆ 🖆	)
Task	s	💾 Save 🔻	🕂 🕂 🖶 Print 🛛 📭 Sign Off t	o History 🔻	••• Act	ions 🔻 🔞		No selection Q	2
Ē	General	834641					Status: CC	MPLETE IS: Not Applied	
≋≣	Actions						LOCK Stat	Not Applied	
2	Events (2)	Details	Other				Raised	28/01/2021 16:16 GMT 🛛 👜	
2	Resources	Task Seq	1497730	Cla		BREAKDOWN:Non Service Call	Due By 🔒	28/01/2021 16:16 GMT 🛛 👼	
4	Time Records	Logged By	Peter Tunstall		eated	28/01/2021 16:16 GMT	Scheduled	Date / Time 👜	
<u>(Ô)</u>	Work Permits	Authorised By			thorised	28/01/2021 16:16 GMT	Est Time	0 : 00	
1	Financials	Invoiced Finished	No 29/01/2021 15:53 GMT	H 8 Sig	ned Off	Date / Time	No. Staff Respond	1	
ð	Associate Tasks	Notes	29/01/2021 16:53:16 CET - (Louise F				Attend	-	
	Multiple Reporters		23/01/2021 10.55.10 CET - (E005EF			dik marked as being COMPLETE.	Contain	-	
	Stock						Finished User	29/01/2021 15:53 GMT	
	Tasks List		TEST				. Time Zone		
0	SLA Times	i							
<u> </u>	CSF Audit	•					Compliance	No selection Q	
»	Identity Scans						User Defined	No selection Q	
Q.	Multiple Locations								
	Regulations		4/4000						
_	-	Fault Code	No selection	Q, Sen	v.Type	Non Service Call	~		
6	Task Periods	Cost Centre	No selection	Q, Cos	t Code	No selection	2		
Ē	Notes	Asset Code	No selection	Q Sou	irce	No selection	2		
Fina	ncials 《								

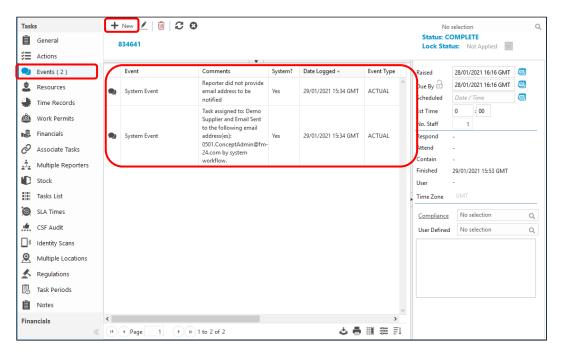
1. Open the task and click onto **Other** at the top of the screen

- 2. You will now see Notes section above the Task Description
- 3. Add text and click Save
- **TIP:** Notes can be written in manually as well as the system putting in automatic notes when the task is Completed
- 4. Click Details to return to just viewing the Task Description

# How to View and Add an Event to a Task

Task Events are a way to add more details to a task. This could be an email from a supplier or client or a way of stating something has been updated. Events can form details of the life of a task and are a useful way to seeing what has happened.

Events are also automated. For example, an event stating that an email has been sent to the reporter when the task is logged, or the resource has been emailed with a job card.



1. Open the Task and click onto Events menu

- Any Events recorded will be in the middle of the screen. These are date and time stamped as well as who added. In the example above, there are 2 events, both are System Events (Automated)
- 3. Click onto New icon + New

Save 🔀 Save and Close 🔇			Task ID 834641
Event Details			
Event			Q
Logged By		Date Logged	01/02/2021 14:30 CET
Event Type	ACTUAL 🗸	Date Due	Date / Time
Actioned	$\checkmark$	Date Actioned	01/02/2021 14:30 CET 👜
Financial Value	0.00		
Comments			
Comments	1500		.i.

4. From the pop-up window click into the Event title and choose an Event from the drop-down list

Event Details		
Event		
	- Call status update	
Logged By	Above £250 Approval	
Event Type	Access Denied/arrangement needed	
	Add Notes/Information	
Actioned	Approve	
Financial Value	Attended	
Comments	CE Number	
Comments	Client Approval / PO Required	
	Client Approve	
	Client Reject	
	Complaint Ongoing	
	Complaint Resolved	
Comments	Cost Approved	
	Cost Rejected	
	Covid-19 Activity	
	Document Rejected	
	Document Verified	
	Escalate To Client	
	Extend Task Due Date	
	Fully Approved - Request CE Number	
	Health and Safety Related	
	Invoice Rejected	
	Invoice Validated	
	L1 Approval Required	
	L1 Approved & L2 Approval Required	
		✓ Items 1-25 out of

- 5. Click into the **Comments** section and type (or paste text)
- 6. Click Save and Close

Task	s	+	New 👱   🛍   📿 🤅	3					selection O
Ē	General	8	334641					Status: CC Lock State	OMPLETE us: Not Applied
ĭ≡	Actions								
2	Events ( 2 )		Event	Comments	System?	Date Logged +	Event Type	Raised	28/01/2021 16:16 GMT 👜
2	Resources			Please note that this task will need to be extended			^	Due By 🔒	28/01/2021 16:16 GMT 📋
۲	Time Records		- Call status update	due to parts being on order.	No	01/02/2021 15:53 CET	ACTUAL	Scheduled Est Time	Date / Time
<u>@</u>	Work Permits		System Event	Reporter did not provide email address to be	Yes	29/01/2021 15:34 GMT	ACTUAL	No. Staff	1
N <sup>B</sup>	Financials	~	System Event	notified	Yes	29/01/2021 15:34 GM1	ACTUAL	Respond	-
Õ	Associate Tasks			Task assigned to: Demo Supplier and Email Sent				Accella	-
	Multiple Reporters	•	System Event	to the following email address(es):	Yes	29/01/2021 15:34 GMT	ACTUAL	Contain	- 29/01/2021 15:53 GMT
C	Stock		System Event	0501.ConceptAdmin@fm-		23/01/2021 13:34 61411	ACTUAL		-
	Tasks List			24.com by system workflow.				Time Zone	
0	SLA Times							- <u>Compliance</u>	No selection Q
. <del></del>	CSF Audit							User Defined	No selection Q
<b>)</b>	Identity Scans								
<u>@</u>	Multiple Locations								
≛	Regulations								
	Task Periods								
Ē	Notes						~		
Fina	ncials	۲				<b>—</b>	>		
	~	(H)		1 to 3 of 3		ి 🖣	∰ ≋ El		

- 7. The Task Events Grid can be filtered just like the Task Grid, but you will not be able to search in this grid
- 8. Click **Export to CSV**  $\stackrel{\diamond}{\leadsto}$  if you want to copy the Events to Excel

# How to Complete a Task

Concept will do one of two things to calculate the Completed time

- 1. If the task has a Time Record with a Date Finished, this will be recorded as the Date Finished
- 2. If the task *does not* have a Time Record with a Date Finished, the date and time the Mark as Complete icon was pressed will be recorded as the Date Finished

This can be done from an open task or from the Task Grid.

#### From an Open Task

1. From the Task Grid find the task and open

Tasks	🂾 Save 🔻	🕂 🕂 🖶 Print 🕑 Mark as Con	nplete 🔻 🚥 Ad	tions 🔻 🔇			No selection Q
🧧 General	834641					Status: AS	SIGNED us: Not Applied V
Actions						LOCK Stat	Not Applied V
Events	Details	Other	_			Raised	28/01/2021 16:16 GMT
2 Resources	Reporter	TEST Q Ξ+	Phone			Due By 🔒	28/01/2021 16:16 GMT 🛛 🕮
🕌 Time Records	<u>Email</u>		Req. ID			Scheduled	Date / Time 👜
Work Permits	Building	Demo-02 - Office A Demo	Department	No selection	Q	Est Time	0 : 00
Financials	Location	- SITE - C	Category	Facilities Services	Q	No. Staff Respond	-
Associate Tasks	Priority	P3 C	Discipline	Fac. Srvcs-06	Q	Attend	-
Multiple Reporters	Contract	Demo C	۱ LoC	Logged	Q	Contain	-
Stock	Problem	Administrative Tasks - Filing/Sorting -			Q X	Finished User	-
Tasks List		TEST				Time Zone	GMT
SLA Times	i						No selection
CSF Audit	•					Compliance User Defined	~
Identity Scans						User Defined	No selection Q
Multiple Locations							
		4/4000					
	Fault Code	No selection Q	Serv.Type	Non Service Call	$\sim$		
	Cost Centre	No selection Q	Cost Code	No selection	Q		
Notes	Asset Code	No selection Q	Source	No selection	Q		
Financials							

- 2. Click onto Mark as Complete
- 3. The Task status will now show **Complete**

General							Status: CO	OMPLETE
_	834641						LOCK Stat	us: Not Applied 🗸
Actions	Details	Other						
Events (2)	Details						Raised	28/01/2021 16:16 GMT 🧔
Resources	Reporter	TEST Q	. <b>5</b> 4   X	Phone			Due By 🔒	28/01/2021 16:16 GMT / 💆
Time Records	Email			Req. ID			Scheduled	Date / Time
Work Permits	Building	Demo-02 - Office A Demo	Q	Department	No selection	Q	Est Time	0 : 00
Financials	Location	- SITE -	Q	Category	Facilities Services	Q	No. Staff Respond	1
Associate Tasks	Priority	P3	Q	Discipline	Fac. Srvcs-06	Q	Attend	-
Aultiple Reporters	Contract	Demo	Q	LoC	Logged	Q	Contain	-
Stock	Problem	Administrative Tasks - Filing/S	orting -			<u>م X</u>	Finished User	29/01/2021 15:46 GMT
Tasks List		TEST					Time Zone	
_	i							
	2						Compliance	No selection
CSF Audit	-						User Defined	No selection C
り Identity Scans								
Multiple Locations								
Regulations		4/4000						
Task Periods	Fault Code	No selection	Q	Serv.Type	Non Service Call	$\sim$		
-	Cost Centre	No selection	Q	Cost Code	No selection	Q,		
Notes	Asset Code	No selection	Q	Source	No selection	Q		

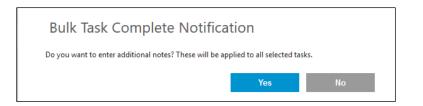
#### From the Task Grid

If you have more than one task to mark as Complete, you can do this from the task grid (without opening the task)

- 1. Select the Task(s) from the Task Grid. These will go blue when selected
- **TIP:** to select more than one task select the first task, hold down the shift key on the keyboard and select another task, this will select a range. Alternatively, select one task, hold down the CTRL key on the keyboard and select another task(s), this will select multiple tasks
- 2. Click onto the downward arrow next to Status
- 3. Select Mark as Complete

Concept Evolution									🖳 😒 🔋	n 🥶
Settings	Tasks Events Documents	Hazards								
Assets	+ New 🗹 🖸 🖶 Print 🗸	Assign 🔻	🔹 Status 🔻 🚥 Ac	tions 🔻	Copen Task Navigator					т
Attributes	Demo_All - Demo All		Authorise	All resour	ces		Q, All	esource teams		Q,
Authorisation			<ul> <li>Mark as Complete</li> <li>Cancel</li> </ul>		Q Guttry No selec	tion				A     A     A     A
Contacts	Level Of Completion	Seq	Sign Off to History	Task Type	Task Reported Date -	Task Due By Date	Finish Date	Name	Code	Building
Contracts	cere or completen	and	1054.10	ters ()p	and reported bare	Task out by out	T mail D die		cour	bunding
Customer Satisfaction Forms			Y Y		T T					
Documents Setup	📋 Logged	1497730		_		GM	т	Macro	Demo-02	Office A Demo
Event Types	Logged	1493893		E -	N	GM	т	Macro	Demo-02	Office A Demo
Facility Booking	Started	1487589			Status	GM	т	Macro	Demo-02	Office A Demo
👼 Finance	_						05/02/2020	10.40		
FSI GO	Task Complete	1048640				GM	GMT	Macro	Demo-02	Office A Demo
🔀 General	Started	1462420	832623	PPM	15/05/2018 23:59 GMT	12/06/2018 23:59 GM	т	Macro	Demo-02	Office A Demo
A Hazard Types	Started	1462419	832622	PPM	15/11/2017 23:59 GMT	13/12/2017 23:59 GM	т	Macro	Demo-02	Office A Demo
E Projects	Completed	1462418	832621	PPM	15/05/2017 23:59 GMT	12/06/2017 23:59 GM	T 21/01/2021	20.01 Macro	Demo-02	Office A Demo
Property & Estates							GMT			
Purchase Orders	Accepted	1462417	832620	PPM	15/11/2016 23:59 GMT	13/12/2016 23:59 GM	т	Macro	Demo-02	Office A Demo
Favourites	Started Started	1462416	832619	PPM	15/05/2016 23:59 GMT	12/06/2016 23:59 GM	т	Macro	Demo-02	Office A Demo
	Logged	1462414	832618	PPM	15/11/2015 23:59 GMT	13/12/2015 23:59 GM	т	Macro	Demo-02	Office A Demo
Settings										
Facilities										
Task Management										
Modules										
System Administration	٢									>
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4. From the pop-up select Yes if you want to add notes or No to just complete the Task



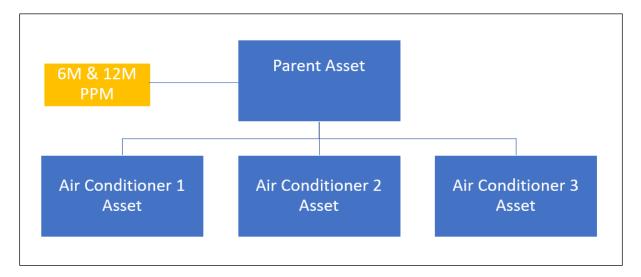
5. The Task(s) selected will now be Completed

### **PPM Tasks**

PPM (Planned Preventative Maintenance) tasks are different from Breakdown Tasks. A PPM is a task that is created against an asset or group of assets that reoccurs over a set period of time. In the UK we use the SFG20 Library of Maintenance Schedules (<u>https://www.sfg20.co.uk/what-is-sfg20</u>).

For example, an Air Conditioning Unit may need a 6 monthly small service and an annual full service. Concept can be configured to produce 2 PPMs in the year. Other assets may need a monthly inspection and an annual service, so only 12 PPMs can be loaded in the year. You may not want to send someone to do the Monthly inspection one week and the next week do the full service. Concept will allow for the lower frequency task to override (replace) the higher one. So, an annual PPM will override a Monthly task.

Another example is grouping assets together. You may have 10 Air Conditioning Units in a building, and they are all serviced on the same day. You can choose to have 10 PPMs (one for each asset) or group the Air Conditioning Units, so you have 1 PPM. This is called Parent and Child Groups (see image below). This option will allow for full reporting on all grouped assets with only having one task to manage.



PPM and Reactive tasks are managed in the same way, but it is important to know the differences.

- 1. Log into Concept
- 2. Click Task Management from the bottom left corner
- 3. Click **Tasks** on the menu above
- 4. Locate and open a PPM task

TIP – use the Task Type column and search for PPM

5. Notice that the PPM task does not contain any Reporter data, the fields above the Description are read only and at the bottom of the screen there is an Asset Code

Tasl	(5	💾 Save 🔻	🕂 🕂 🖶 Print 🛛 🛇 Mark as Comple	ete 🔻 🔸 Act	tions 🔻 🔇			No selection	Q
Ē	General	894370	- 16-03-Ducting - Volume Control [	Dampers and F	Fire/ Smoke Dampers_6M		Status: AS Lock Statu	SIGNED	
≋	Actions								
	Events	Details	Other			_	Raised	15/11/2018 23:59 GMT /	1
2	Resources	Reporter		Phone		)	Due By 🔒	15/11/2018 23:59 GMT /	-
	Time Records	<u>Email</u>		Req. ID		_ I		Date / Time 🥮	2
Ô	Work Permits	Building	Demo-02 - Office A Demo	Department		_ I		0 : 00	
	Financials	Location		Category	PPM		No. Staff Respond	0	—
ð	Associate Tasks	Priority	PPM	Discipline	PPMs	ノ	Attend	-	
÷.	Multiple Reporters	Contract	Maintenance contract for Demo OI	LoC	Logged	Q	Contain -	-	
	Stock	Problem	16-03-Ducting - Volume Control Damper	and Fire/ Smoke	Dampers_6M		Finished -	-	
	Tasks List						User · Time Zone	GMT	
0	SLA Times	i							
		•					Compliance		
<b>.:</b>	CSF Audit						User Defined	No selection	Q
L»	Identity Scans								
2	Multiple Locations		0/4000			.:			
~	Regulations	Fault Code	No selection Q	Serv.Type	Non Service Call	$\sim$			
8	Task Periods	Cost Centre	Demo-CC02 - Demo-M&E Q	Cost Code	No selection	0			
Ë	Notes	Asset Code	DEMO-0546 - TOILET AND SHOWI Q	Source	No selection				
Fina	incials					-			
Ē	Notes		Demo-CC02 - Demo-M&E Q	Cost Code		Q Q			

6. The **Problem code** may give you information about the task. Note the example below, we can see that it is for Ducting and happens every 6 months. Other examples may just show the frequency of the task.



7. The Asset Code will show the code and description of the asset

Asset Code	DEMO-0546 - TOILET AND SHOWI Q	

8. If there is not enough room to see the details from the task window, you can click onto the **Asset Code** label (which is a link) and a pop-up window will show you the asset details.

DEMO-0546 -	TOILET AND S	HOWR ROOM VENT	ILATION FIRE DA	MPER	Status	: ACTIVE - Active
Details	Notes	Financial/Risk	Spatial			
sset						
Asset Code	DEMO-0546			Group	SFG-16-03	
Building	Demo-02 - Of	ffice A Demo	Q	Site	Macro	
Location	- 2nd Floor -		Q	External Ref		
lassification						
System	F&LS-Fire and	d Life Safety	Q	Tag	Demo-	C
Type	No selection		Q	Name	No selection	0
etails						
Description	TOILET AND S	SHOWR ROOM VENTILAT	TION FIRE DAMPER	Parent Asset	No selection	(
Product Code				Serial No.		
Manufacturer	ADVANCED A	IR LTD		Model	0100 SERIES	
Barcode	0810-0546			Drawing #		
Qty		1.00		Supplier	No selection	(
Cost Centre	Demo-CC02 -	- Demo-M&E	Q	Object Ref		

9. If you don't have permissions to see the Asset Details, please speak with your line manager and email Concept Admin to add this to your profile.

#### Using the Actions Menu (for PPM Tasks)

Some PPM tasks are using assets in a parent and child group. There will be an extra set of steps to do before the task is completed

- 1. Log into Concept
- 2. Click Task Management from the bottom left corner
- 3. Click Tasks on the menu above
- 4. Locate and open a PPM task
- 5. Navigate to the Actions menu on the left

Tasks	5	+ New 👱   💼   13 🔨 🗸 12   🔗 🔗   32 😵						No selection	Q
Ĭ	General	894370 - 16-03-Ducting - Volume Control Dampers and Fire/ Smoke Dampers_6M							
ŝ≡	Actions								
2	Events			Sort Order 🔺	Name	Actioned	Asset	Building	Location
2	Resources			1	16-03-Ducting - Volume Control Dampers and Fire/ Smoke Dampers_6M		DEMO-0547 - TOILET AND SHOWR RM VENTLTION MTRISED SMKE DMPERS	<u>Demo-02 - Office</u> <u>A Demo</u>	<u>2F - Gents Toilet</u> =
	Time Records	0	≝						
Ô	Work Permits								
1	Financials	0	≡	2	16-03-Ducting - Volume Control Dampers and Fire/ Smoke Dampers_6M		DEMO-0600 - TOILET AND SHOWR RM VENTLTION MTRISED SMKE DMPERS	<u>Demo-02 - Office</u> <u>A Demo</u>	<u>2F - Ladies Toilet</u> =
Õ	Associate Tasks								
÷.	Multiple Reporters								
C	Stock						DWPERS		
	Tasks List								
Ø	SLA Times								
. <b>:</b>	CSF Audit								
D)	Identity Scans								
<u>@</u>	Multiple Locations								
_	Regulations								
0	Task Periods								
Ĩ	Notes							_	~
Finar	ncials	<	1	→ → 1 to 2 of 2				Save 🕹	、 ● ● ● 章 司
	*	Page	1	I to 2 of 2				Save 😜	

- 6. On the example above there are 2 actions. This means there are 2 assets grouped together and maintained at the same time
- 7. Check the box under Actioned to say this asset have been maintained
- 8. The red triangle on the top left of this field indicates that this change needs to be saved



9. Click onto Save at the bottom right side of the screen



10. Alternatively, you can click the **Mark all actions as actioned** icon to tick all the actions and saves these changes



11. The rest of the process of updating the task is listed in the manual above. <u>Click here</u> to go back to the table of contents