Concept Training Manual

For Concept Version 5.3 onwards

Classification - Public

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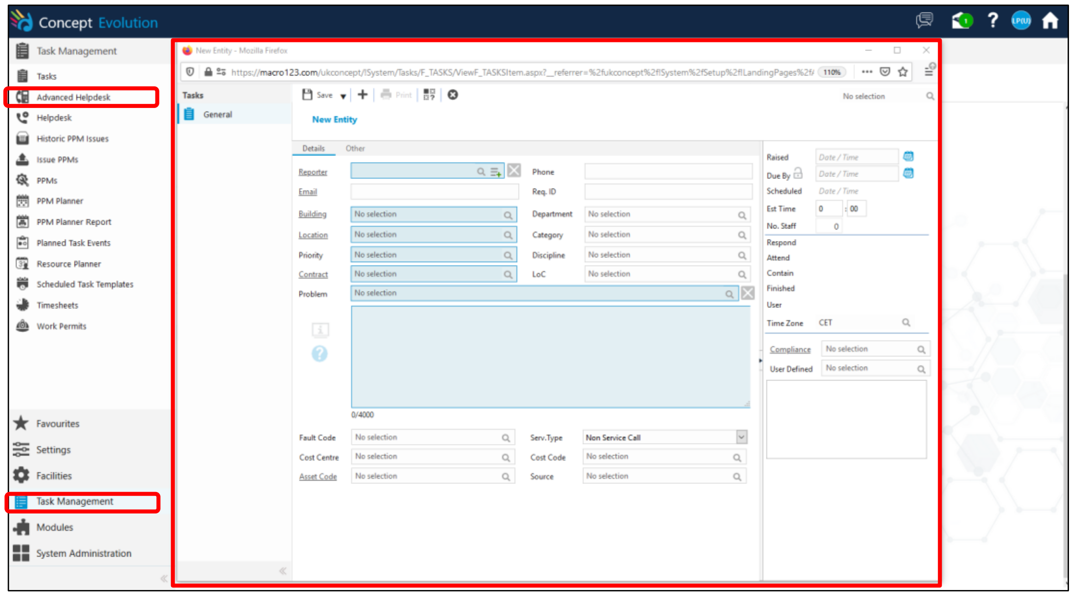
Creating a New Task in Concept

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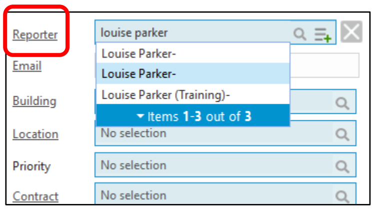
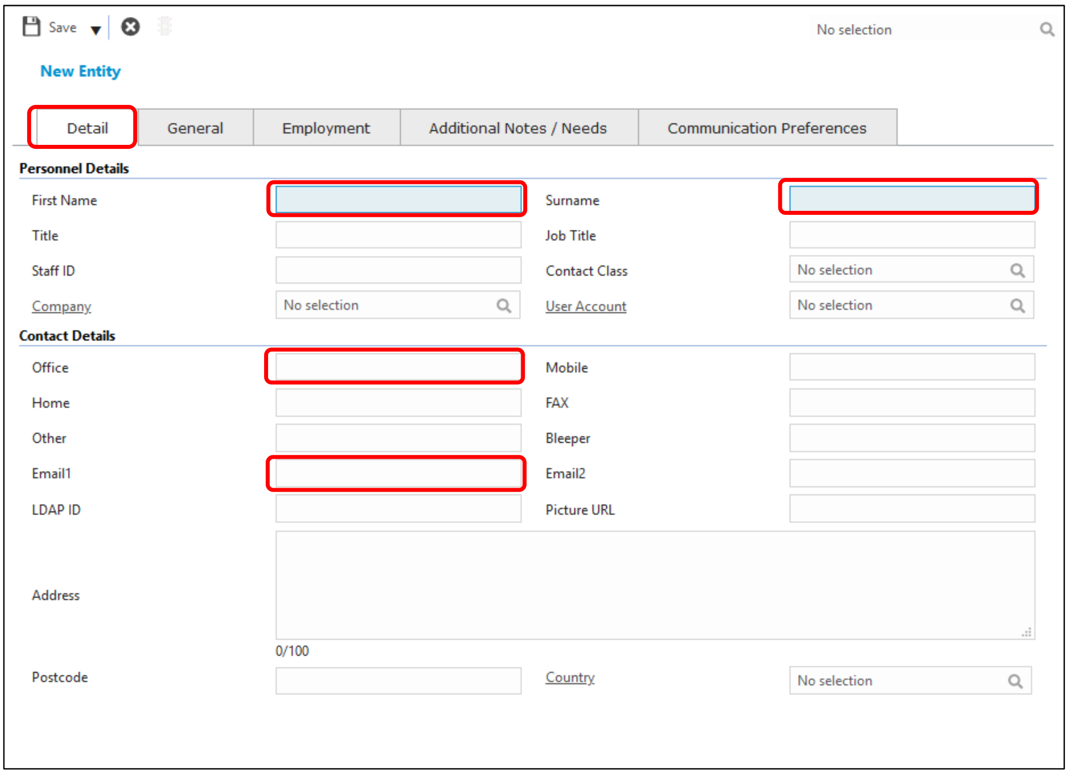
Add/Update a Reporter and Add a Building to a Task

1. Start to Type the name of the person in the Reporter field

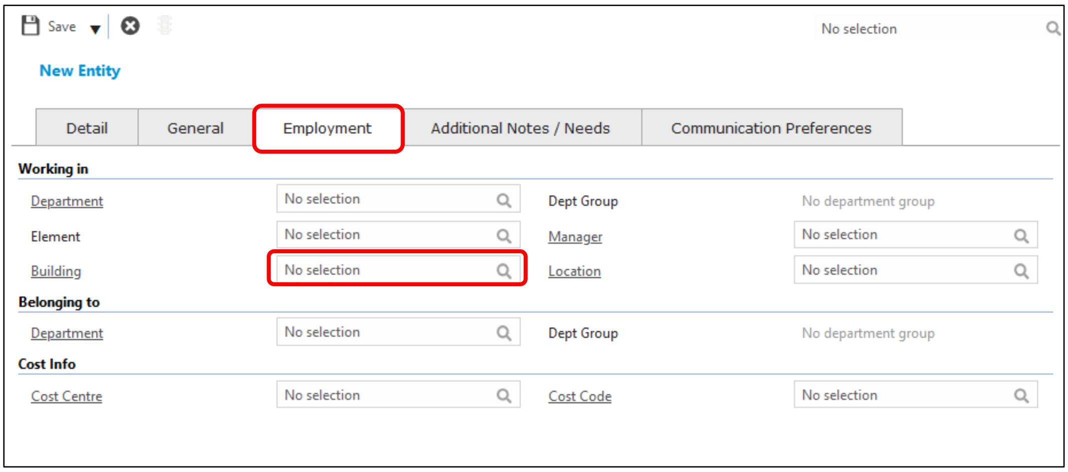
- **TIP:** If you type * at the beginning you can search for the last name



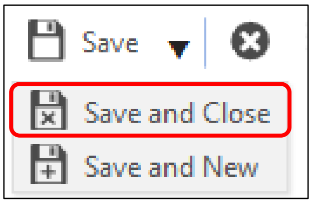
2. If the reporter is registered in Concept, they will appear in the drop-down list. Select the name and this will populate the relevant fields
3. If the reporter is not registered in Concept, click the **Reporter** label, and enter the details. See image below



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



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

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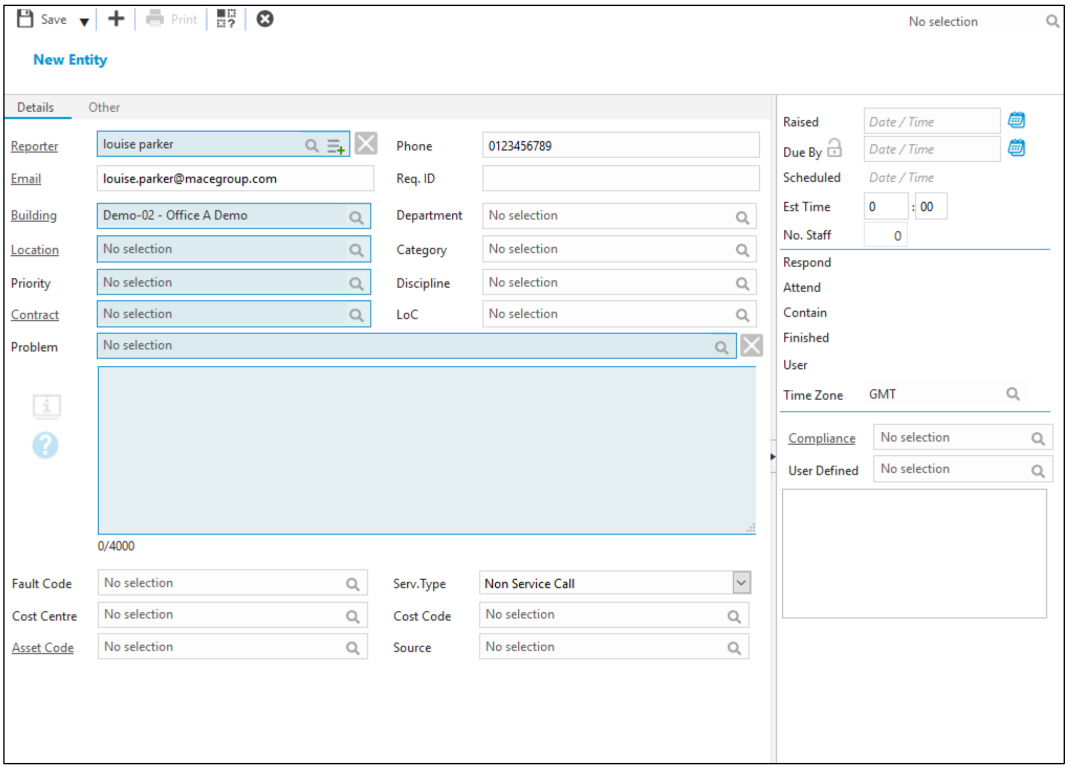

12. To finish off this section you need to choose a Location
13. Click into the **Location** field and choose a location

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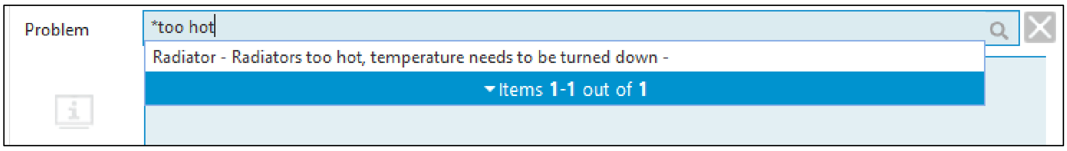
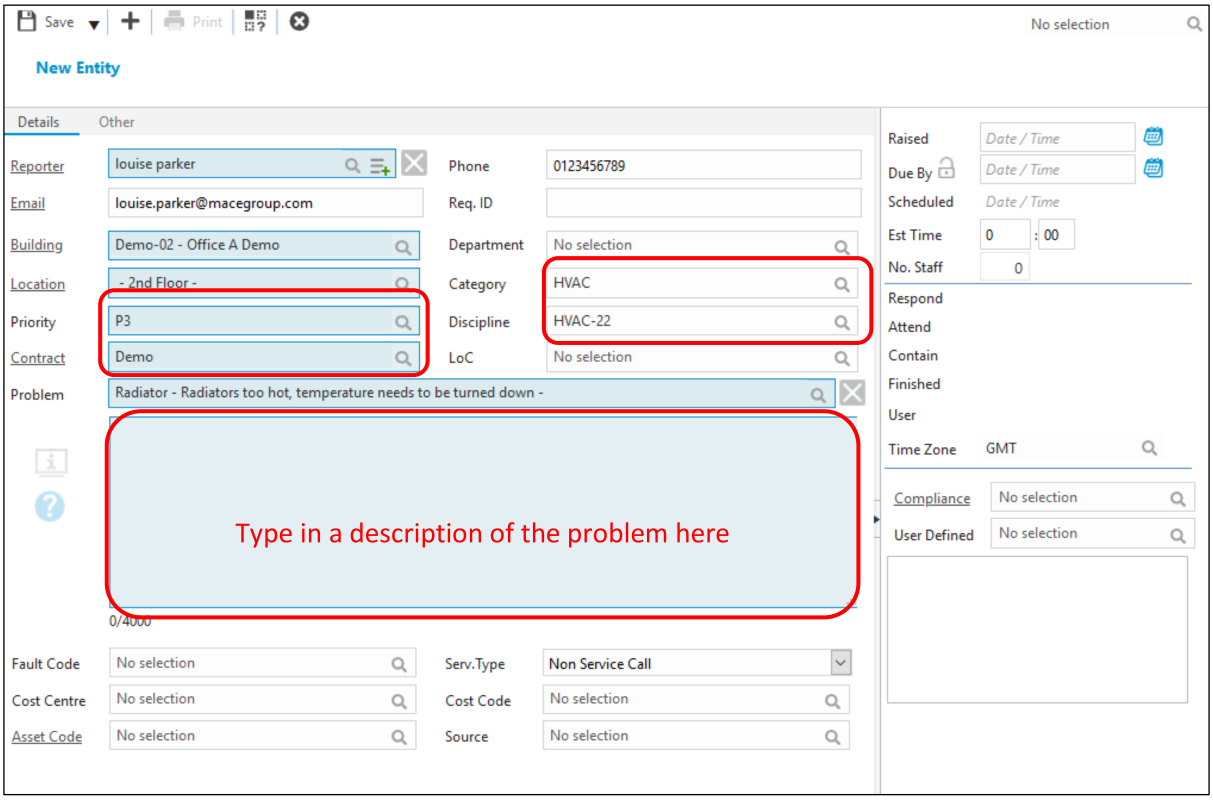
Add a Problem and Description to a Task

1. 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



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



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

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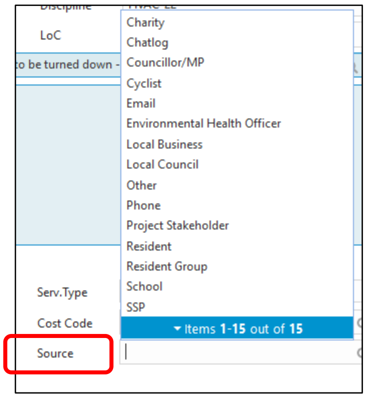
Add a Source

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



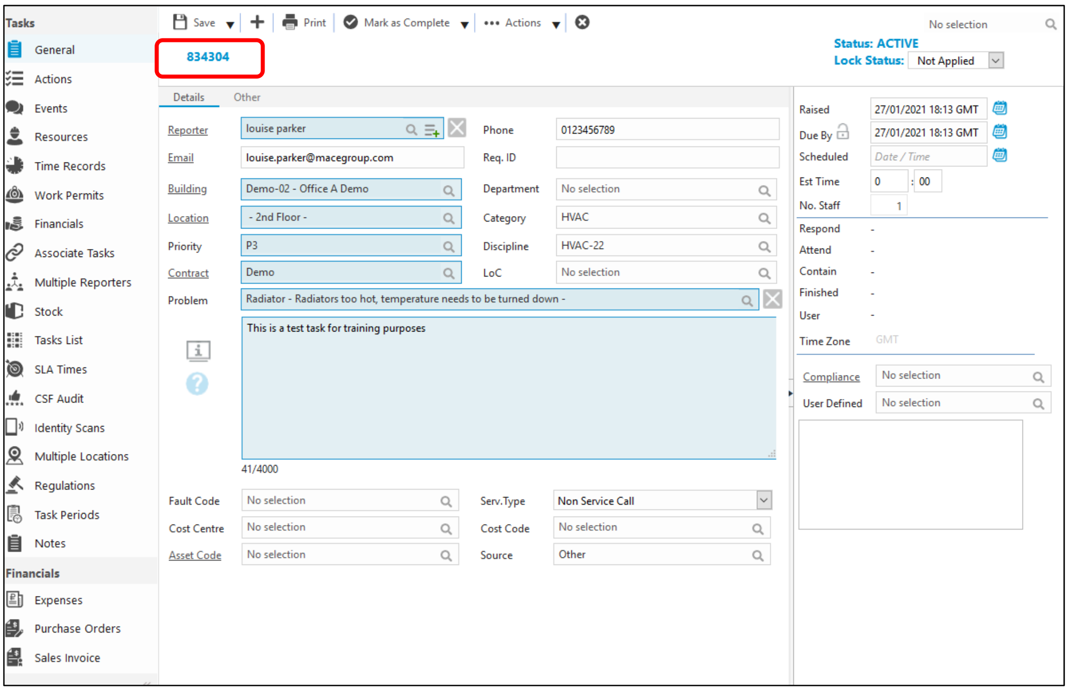
2. Choose one of these from the list

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



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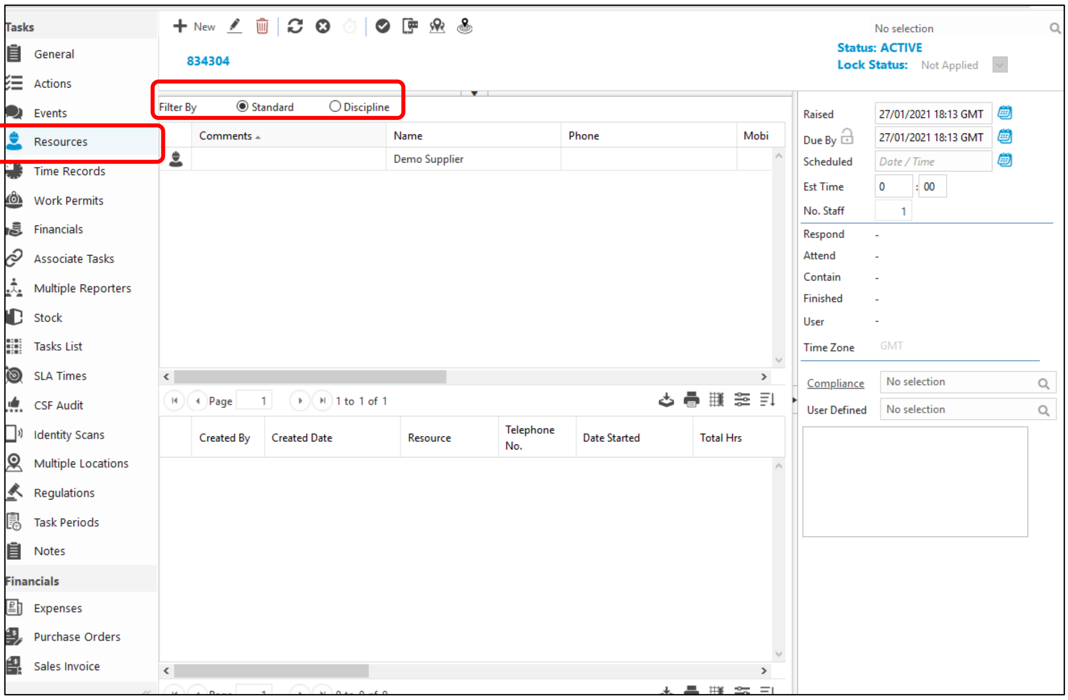
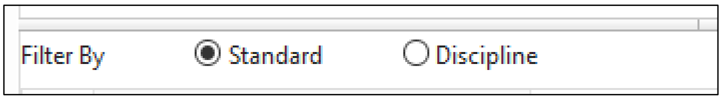
How to Add a Resource

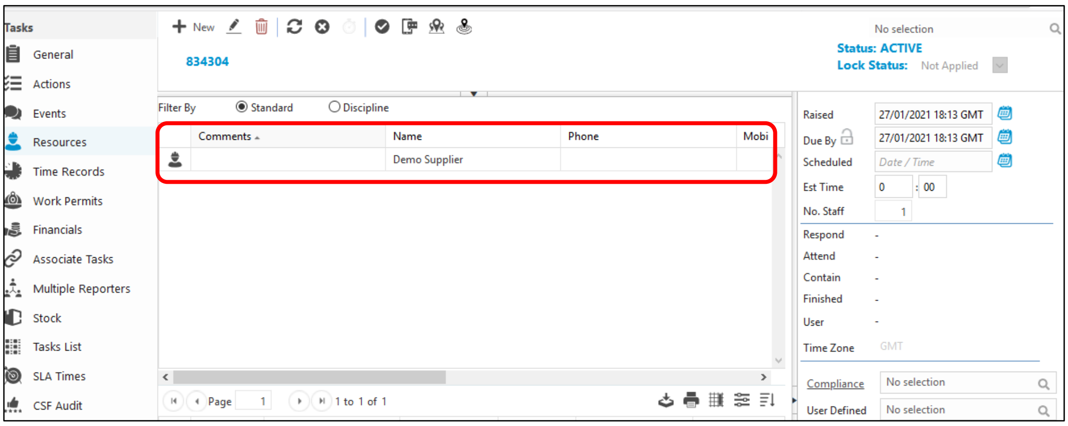
1. From the menu on the left of the screen, select **Resources**



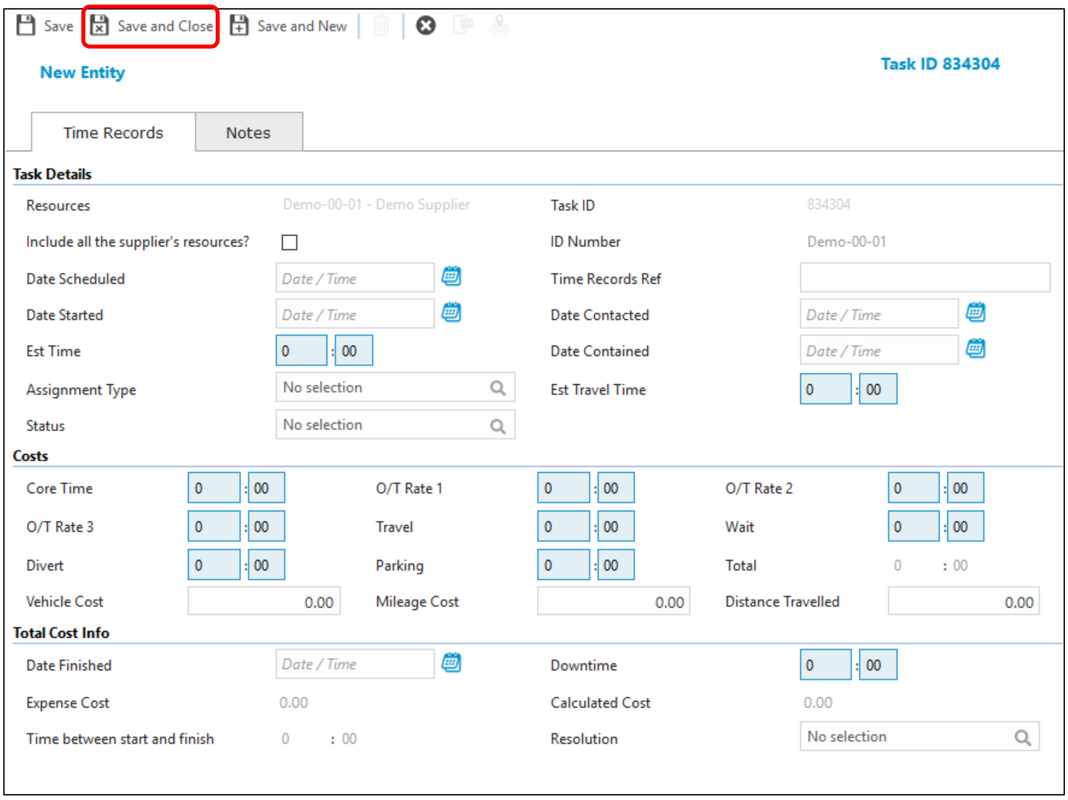
2. You have two ways to filter the list of resources; **Standard** and **Discipline**



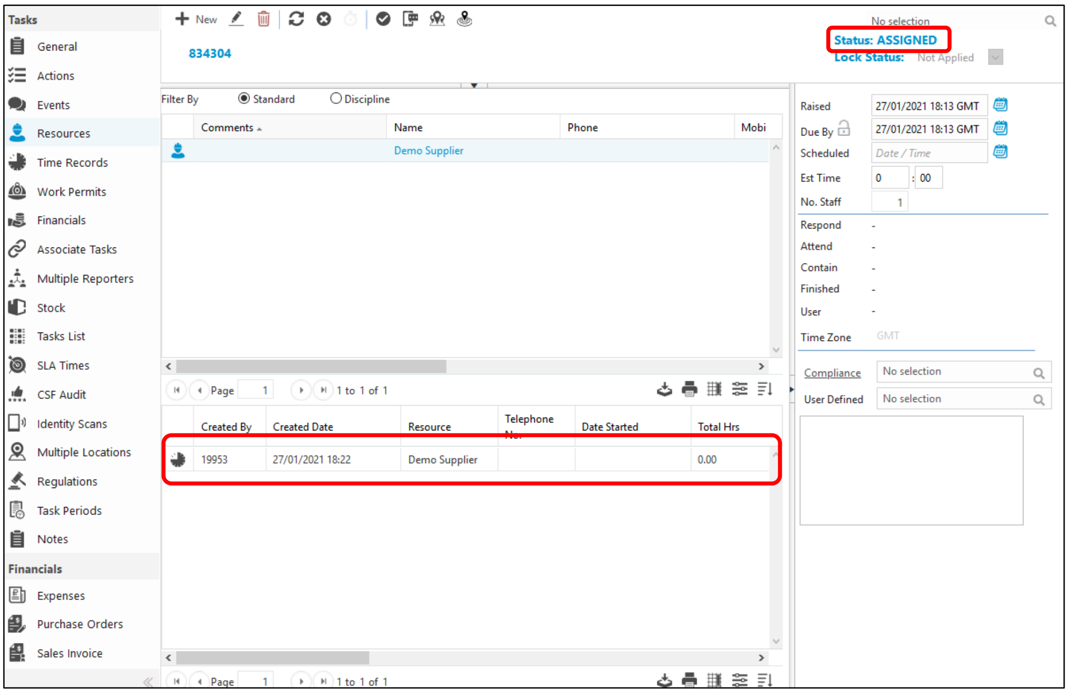
3. **Standard** will show all resources and **Discipline** will only show resources who have the same Discipline as the task
4. Double click the resource from the top half of the screen. (In the example below there is only one available resource)



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



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).



8. From this point you can close the task by using the **Close** Icon from the toolbar at the top of the screen

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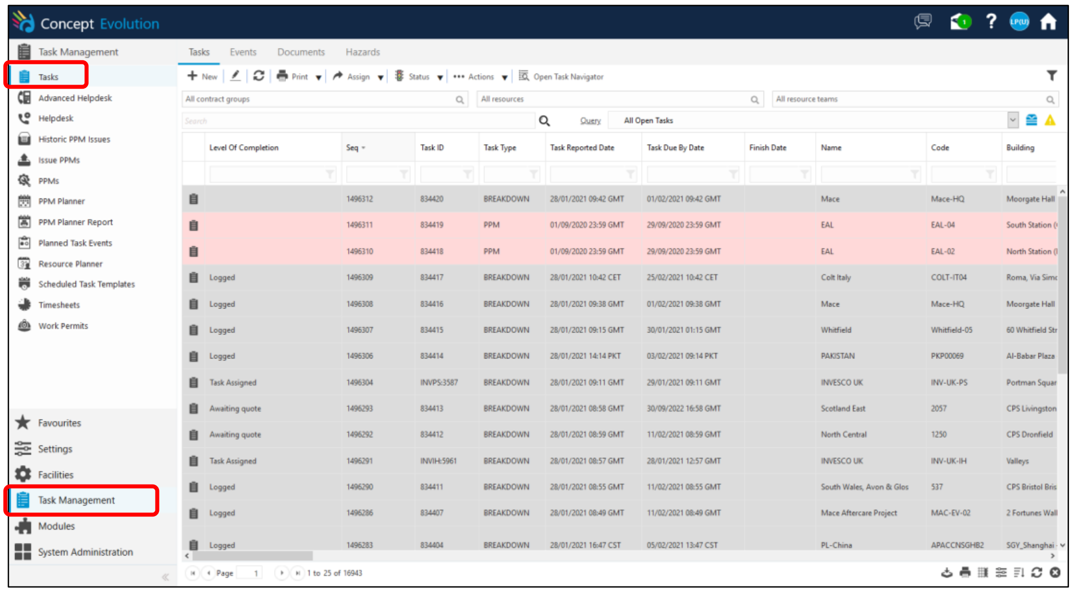
How to Access the Task Grid

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



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.

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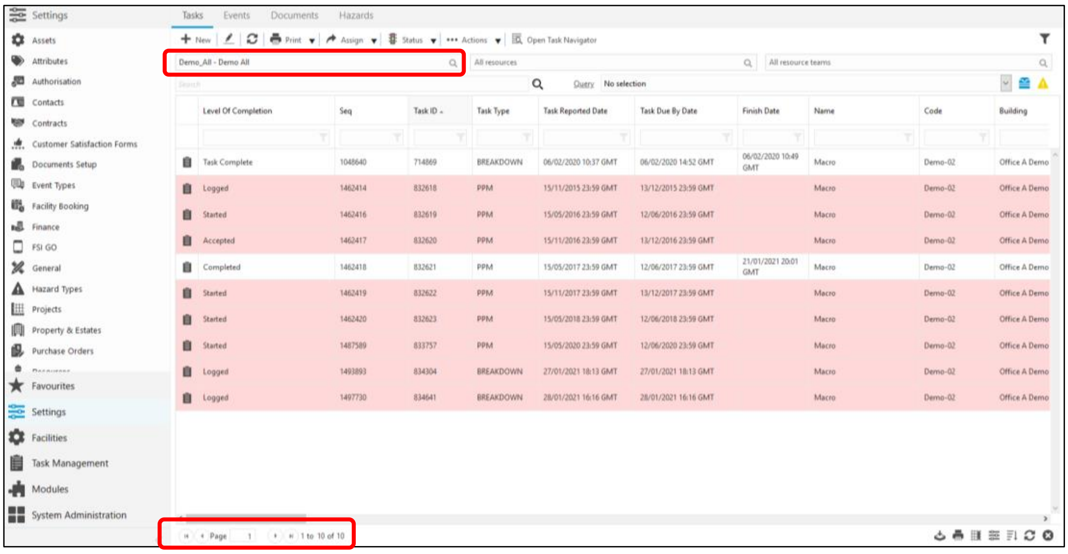
How to Search the Task Grid

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.



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**
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

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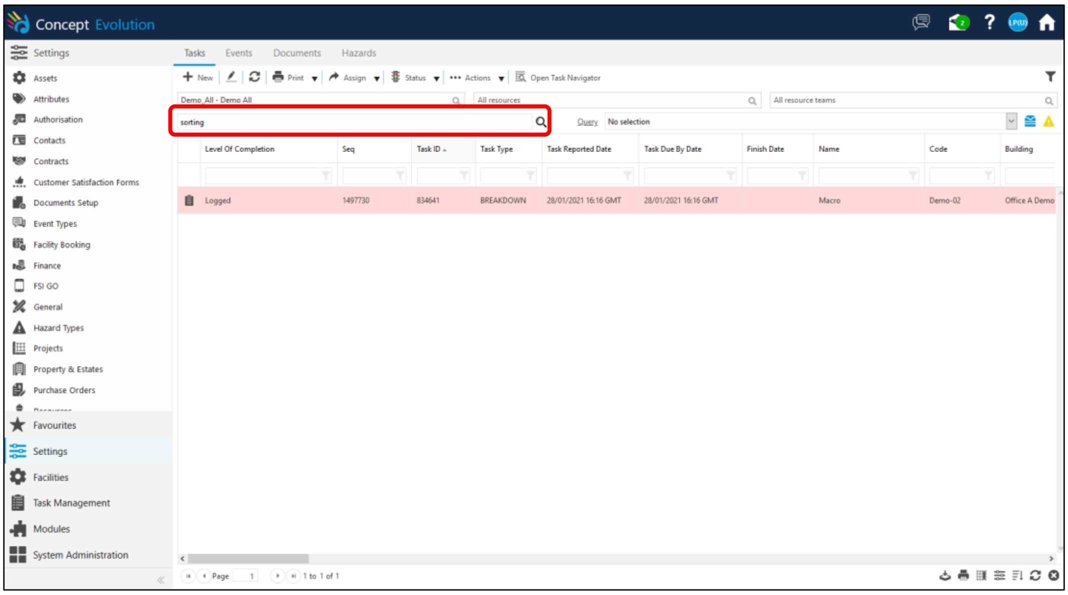
Quick Search

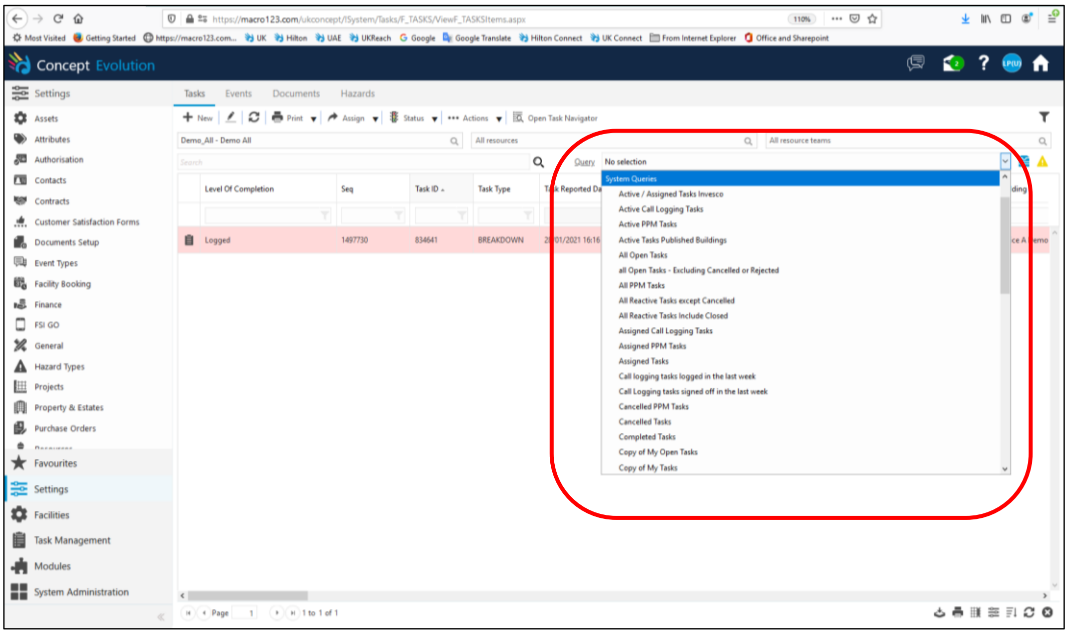
Quick search is a quick way of looking for a task or group of tasks. Although this is quick, it may return many tasks as this searches across multiple columns.



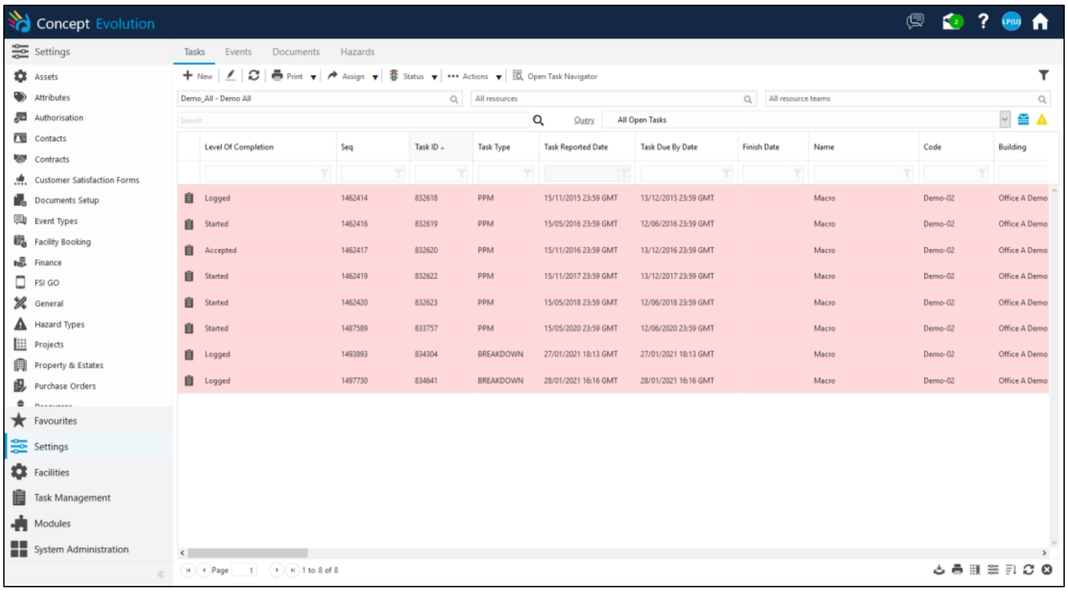
1. Click and type a key word into the Search field
2. Click **Refresh**
3. Any tasks that match this entry will appear in the task grid

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.



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



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

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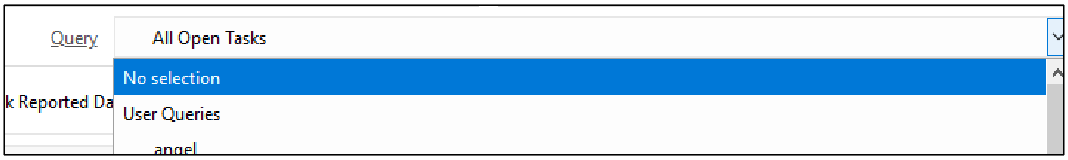
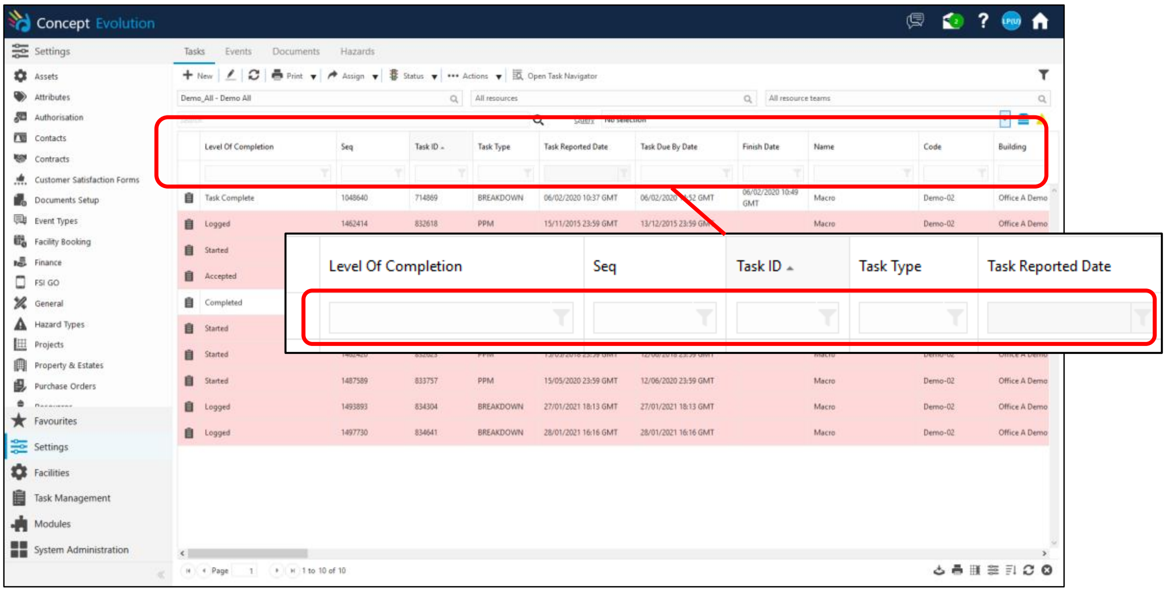


7. The task grid will refresh automatically and remove this query

Specific Data Search

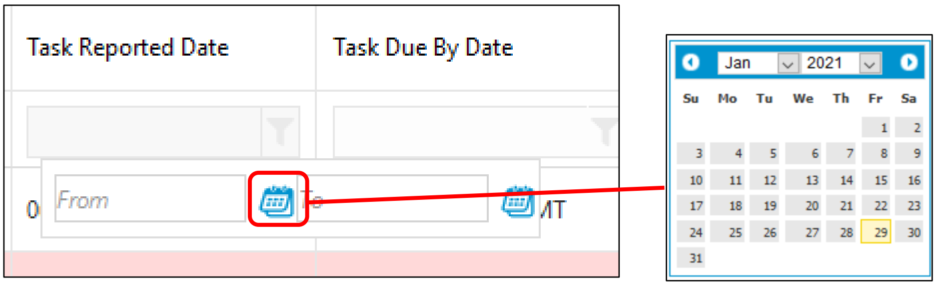
Doing a specific data search is a more efficient way of finding a task(s). For example, if you want to find a specific Task ID or show tasks for a certain building, you can enter data into these fields. Any column with a filter box underneath can be used to search for data. Some fields do not have this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



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**
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

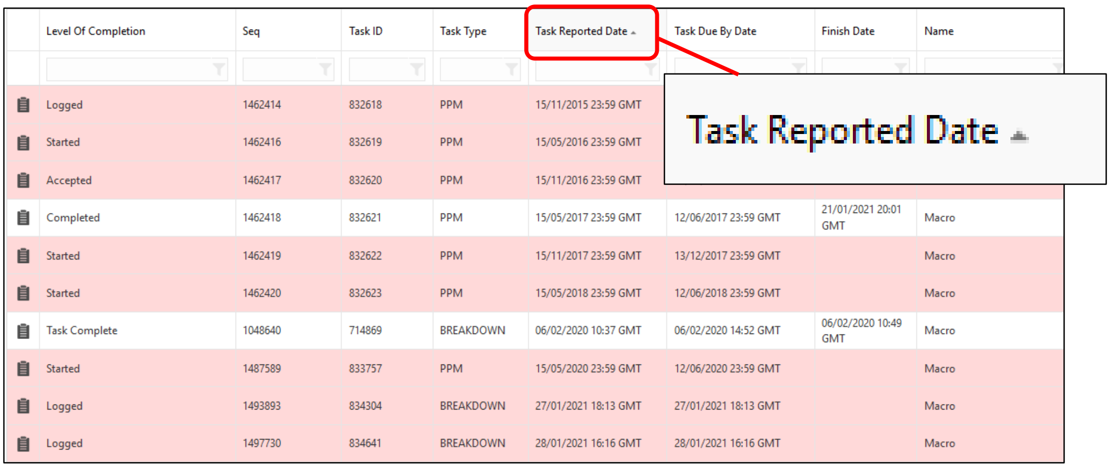


10. Click onto the calendar icon to input the date(s)
11. Click **Refresh**

How to Filter the Task Grid

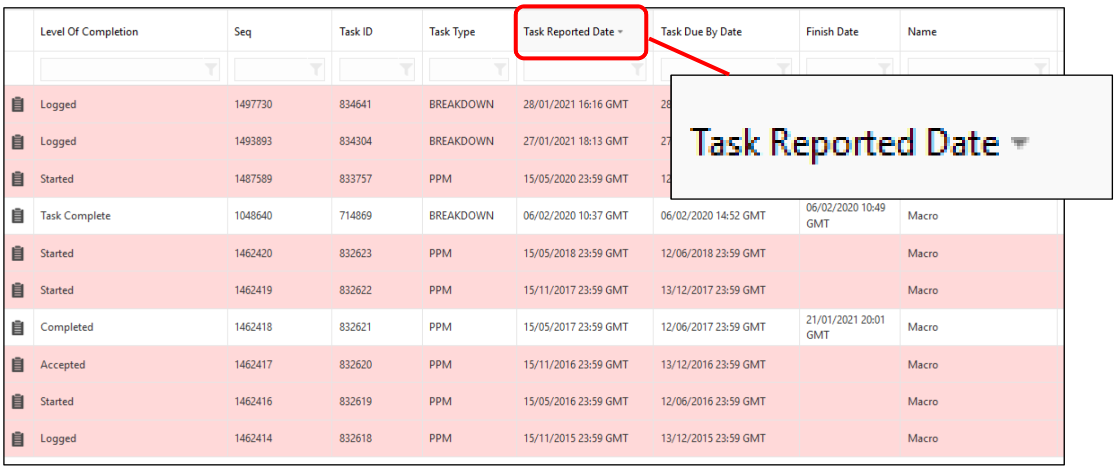
Concept will allow you to filter your tasks in an ascending or descending order. For example, if you want to see tasks in order of date logged, you can sort in a descending order, so you see your newest tasks at the top of the list.

1. 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



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

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



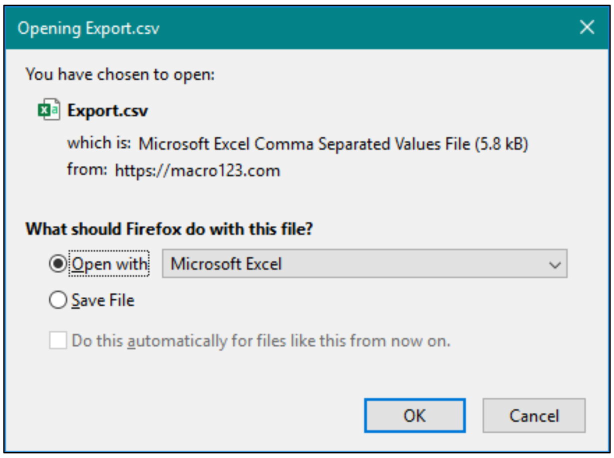
Level Of Completion	Seq	Task ID	Task Type	Task Reported Date	Task Due By Date	Finish Date	Name
Logged	1497730	834641	BREAKDOWN	28/01/2021 16:16 GMT	28		
Logged	1493893	834304	BREAKDOWN	27/01/2021 18:13 GMT	27		
Started	1487589	833757	PPM	15/05/2020 23:59 GMT	12		
Task Complete	1048640	714869	BREAKDOWN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

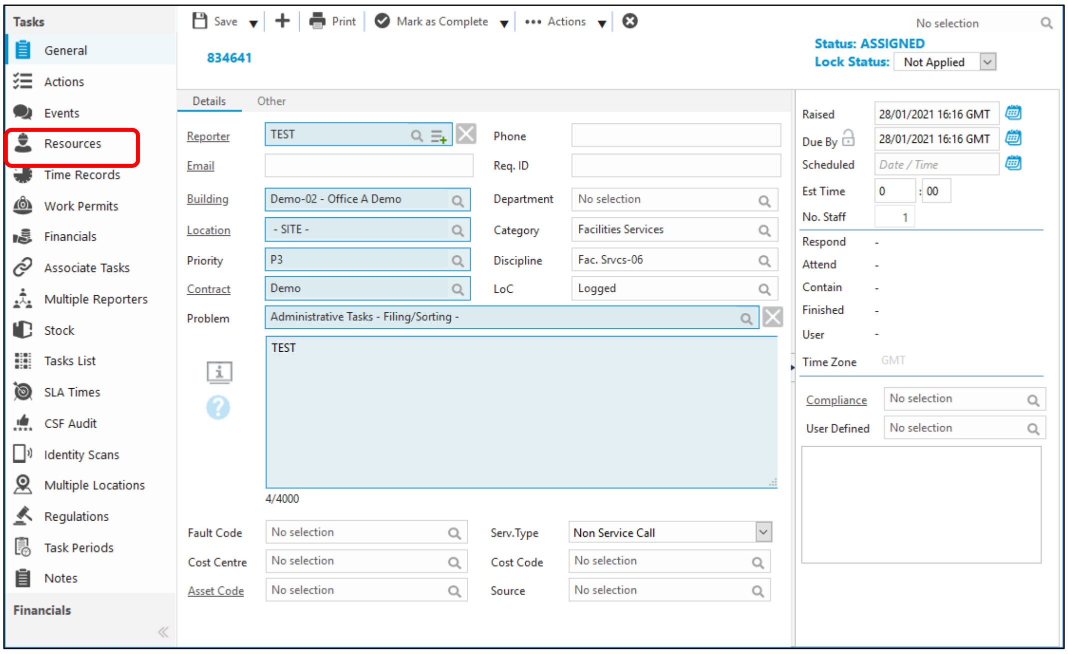
1. Click onto the **Export to CSV** icon on the bottom right corner of the screen
2. Depending on the number of tasks you have in the Task Grid, this could take a few seconds to a few minutes.
3. From the pop-up window choose **Open With** and select **Microsoft Excel**



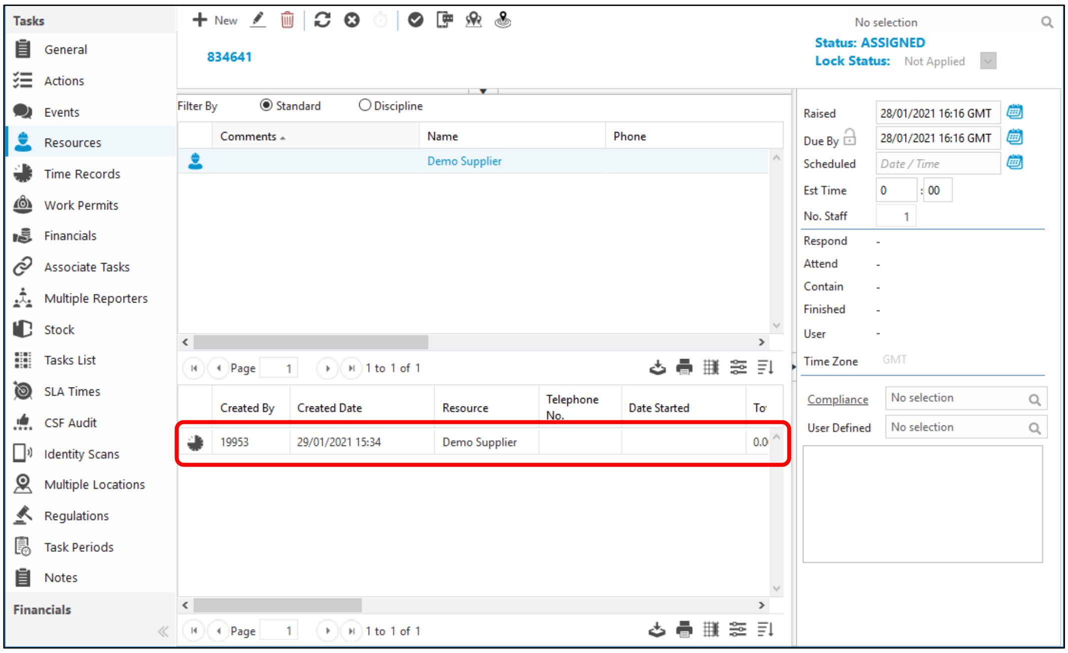
4. Click **OK**
5. This process will open Excel and from there you can save this as an Excel Workbook

How to Change the Time on a Time Record

1. From the Task Grid find the task and open



2. Go to the **Resources** menu



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

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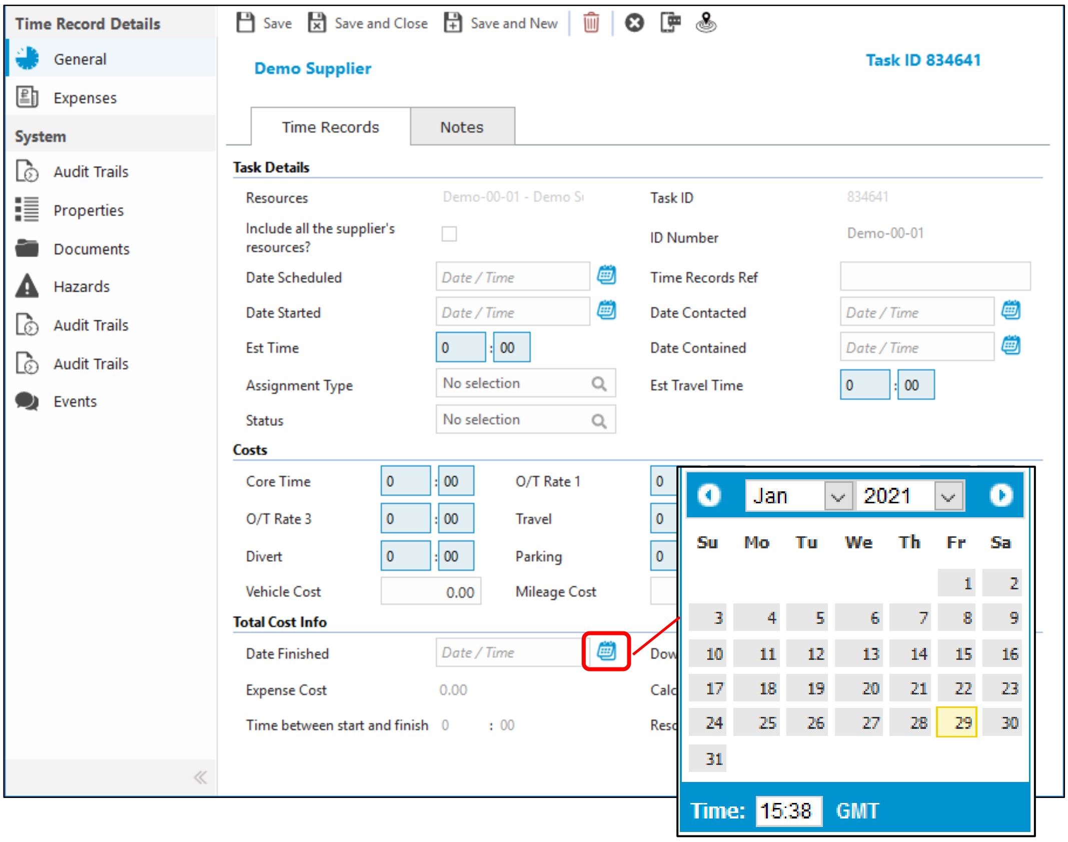
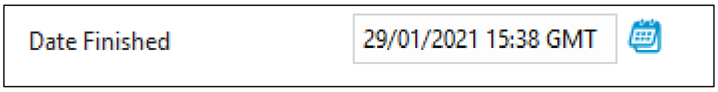
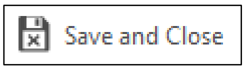


4. Click the Calendar icon next to the **Date Finished** field
5. Select the Date and Time
6. Click your mouse away from this window (any white area of the time record window)



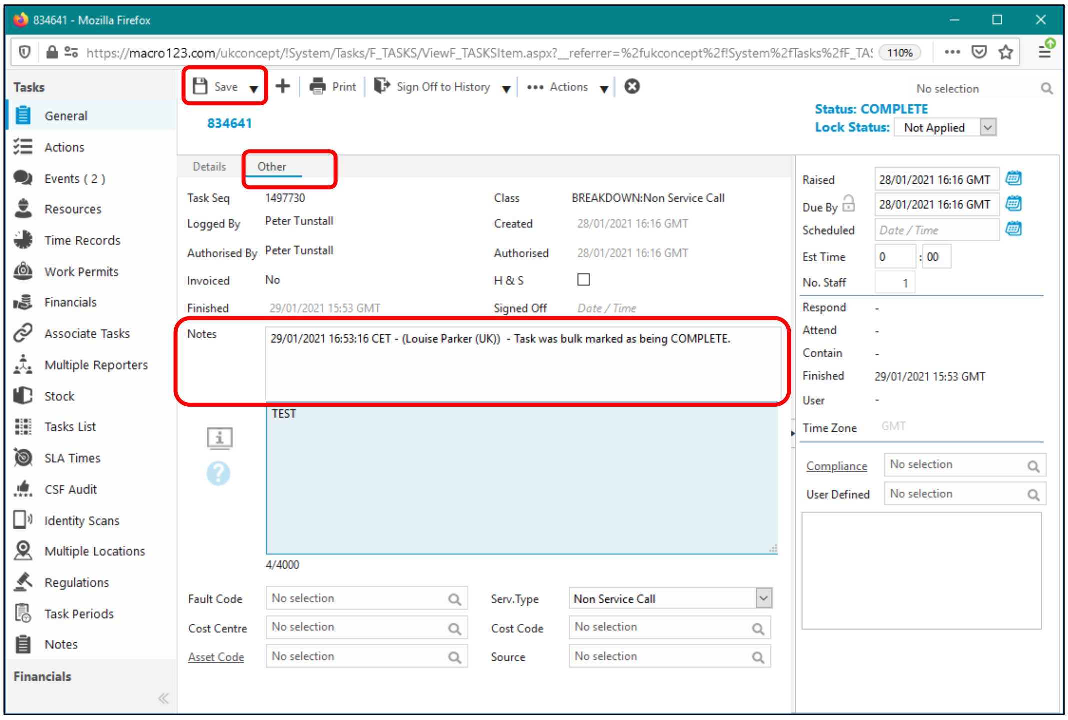
7. The date and time will now be entered into the field
8. Click **Save and Close**



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.

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

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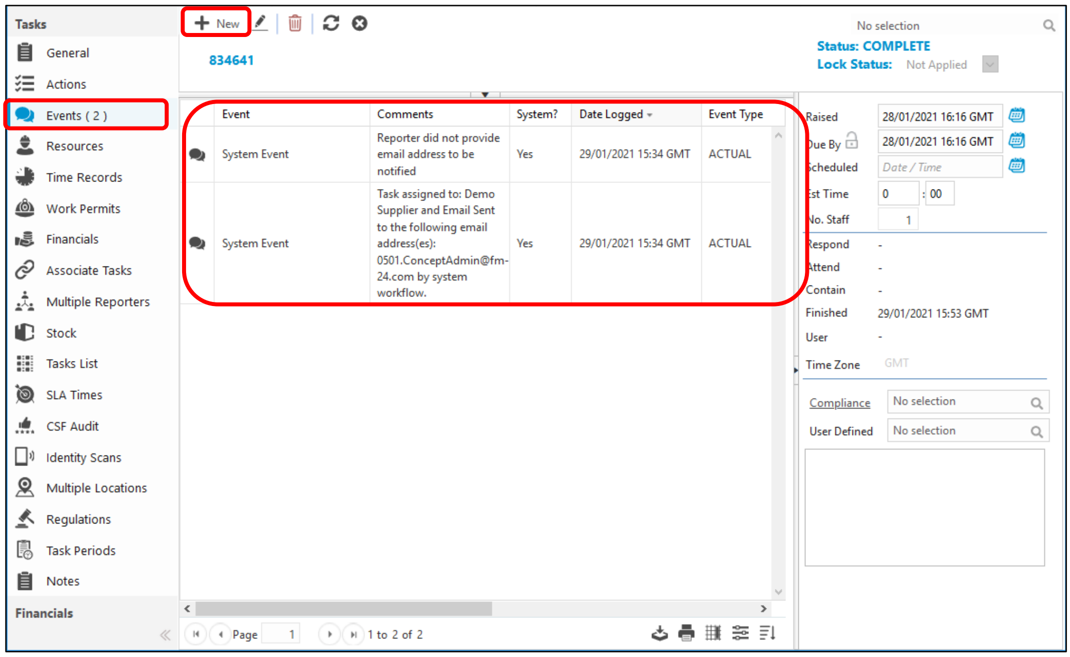
How to View and Add an Event to a Task

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



2. 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

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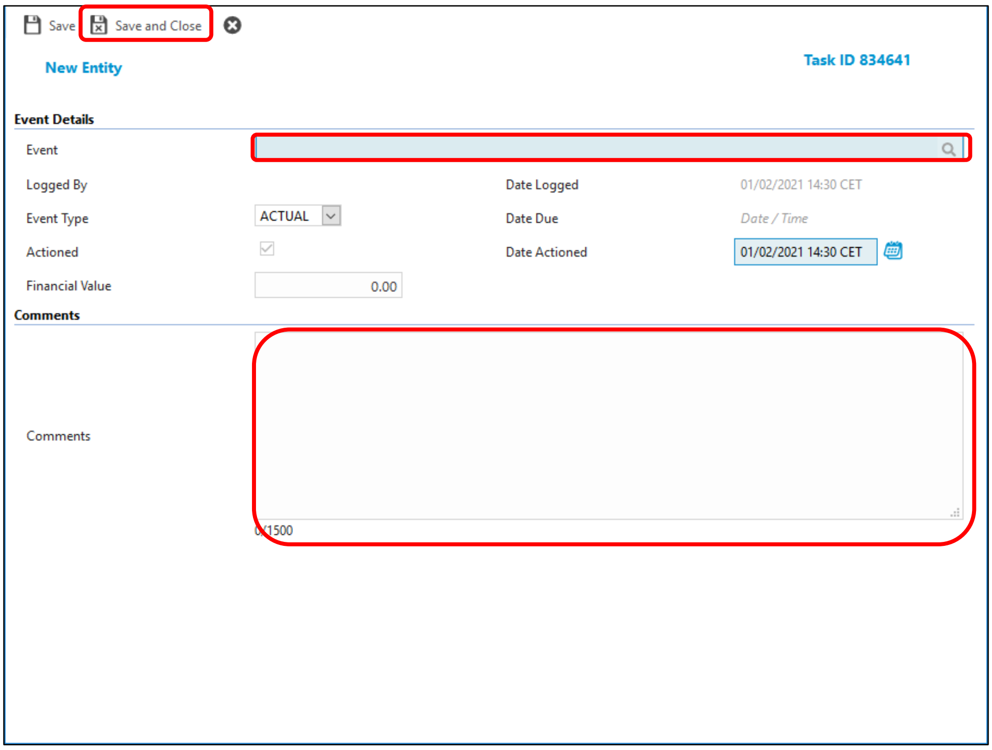
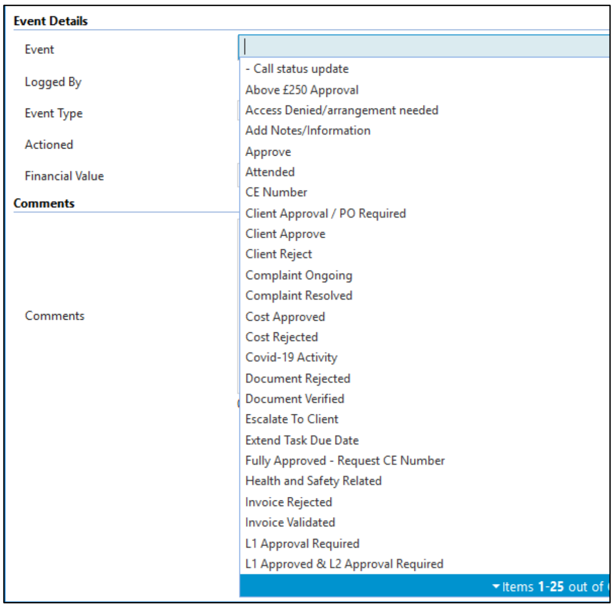
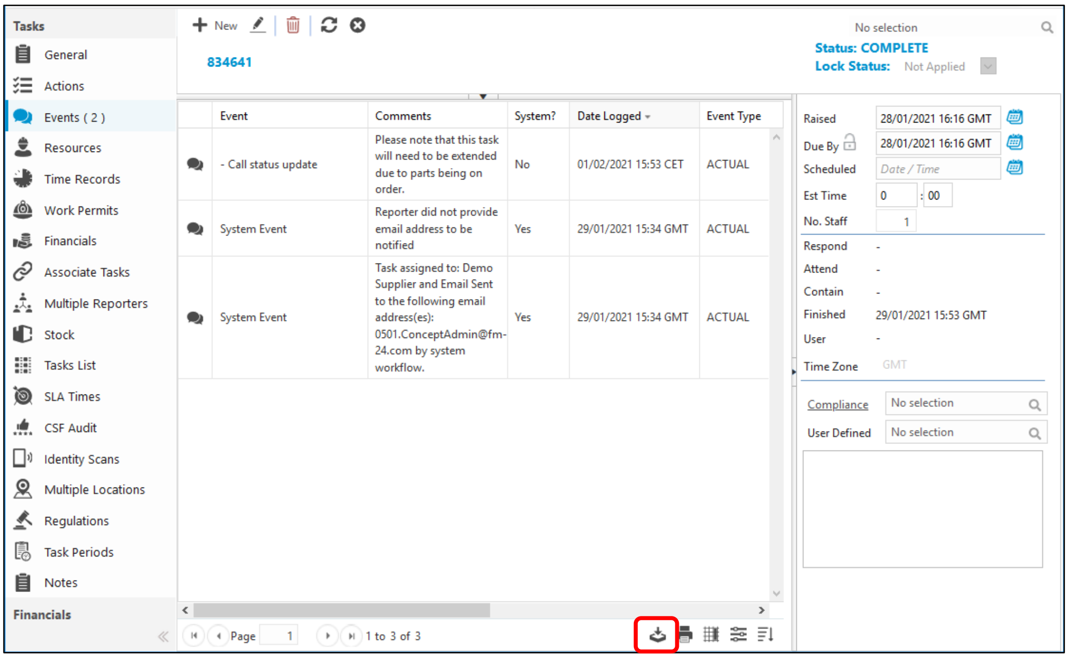


4. From the pop-up window click into the **Event title** and choose an Event from the drop-down list



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



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** if you want to copy the Events to Excel

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How to Complete a Task

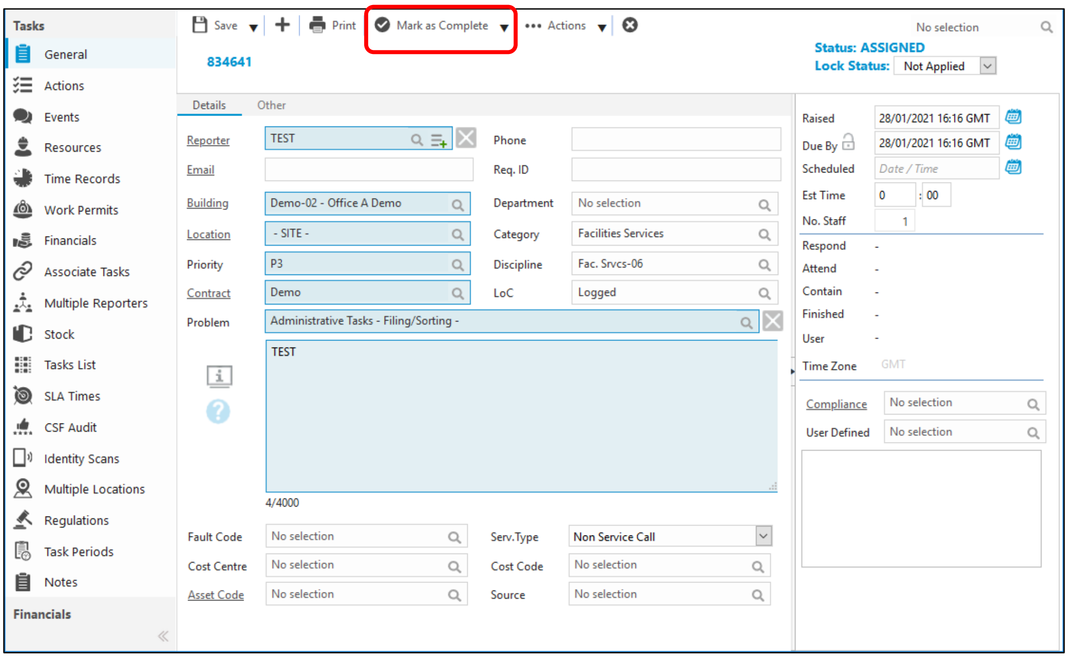
Concept will do one of two things to calculate the Completed time

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



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

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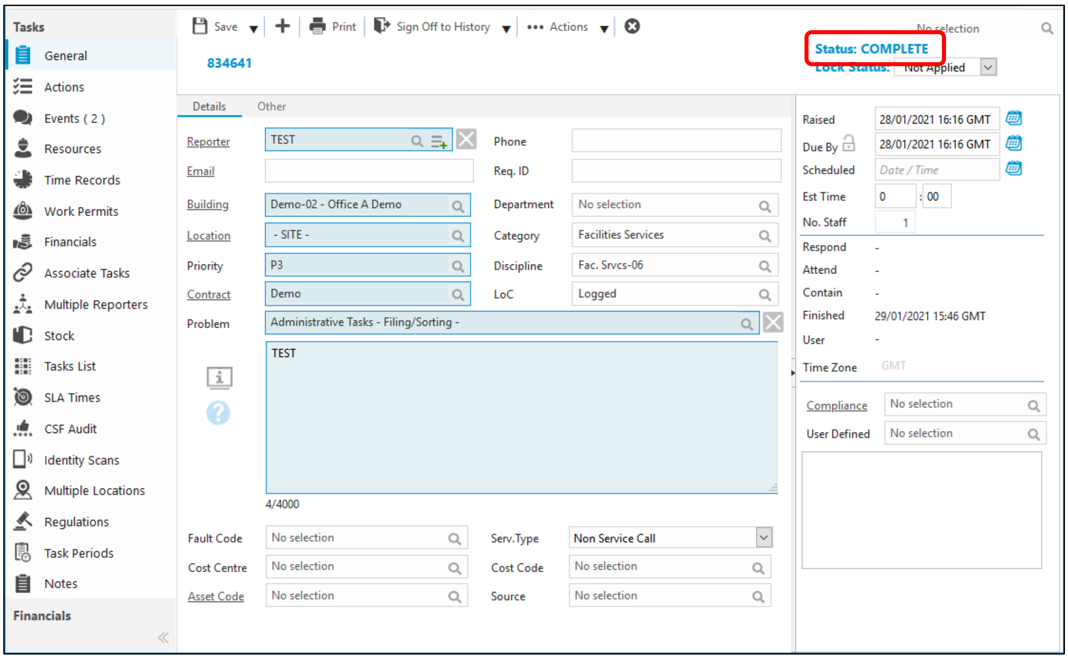


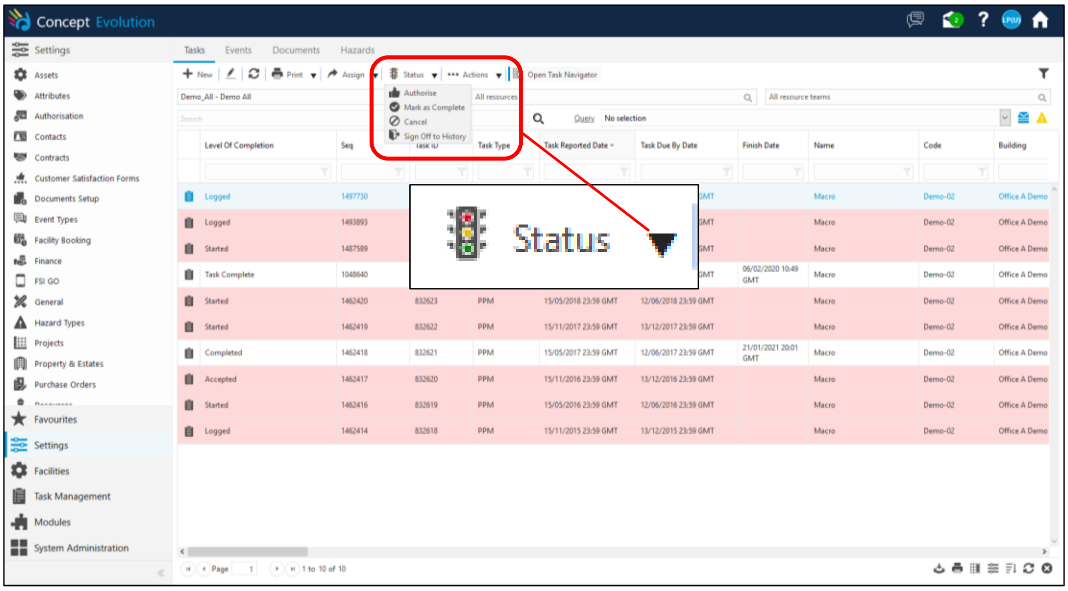
From the Task Grid

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**



4. From the pop-up select **Yes** if you want to add notes or **No** to just complete the Task

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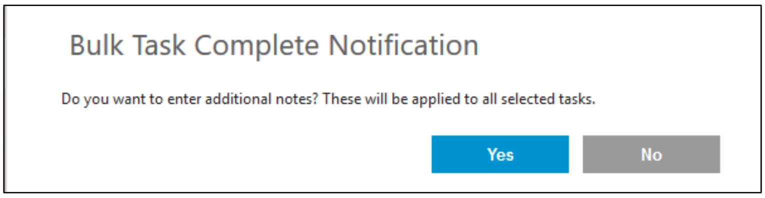

5. The Task(s) selected will now be **Completed**

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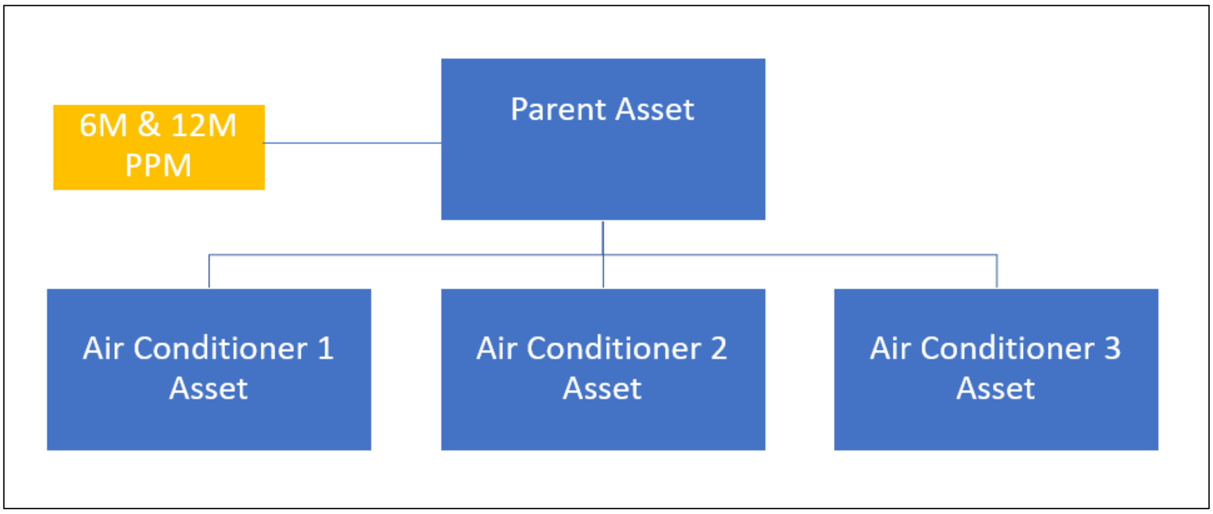
PPM Tasks

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 (https://www.sfg20.co.uk/what-is-sfg20).

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.

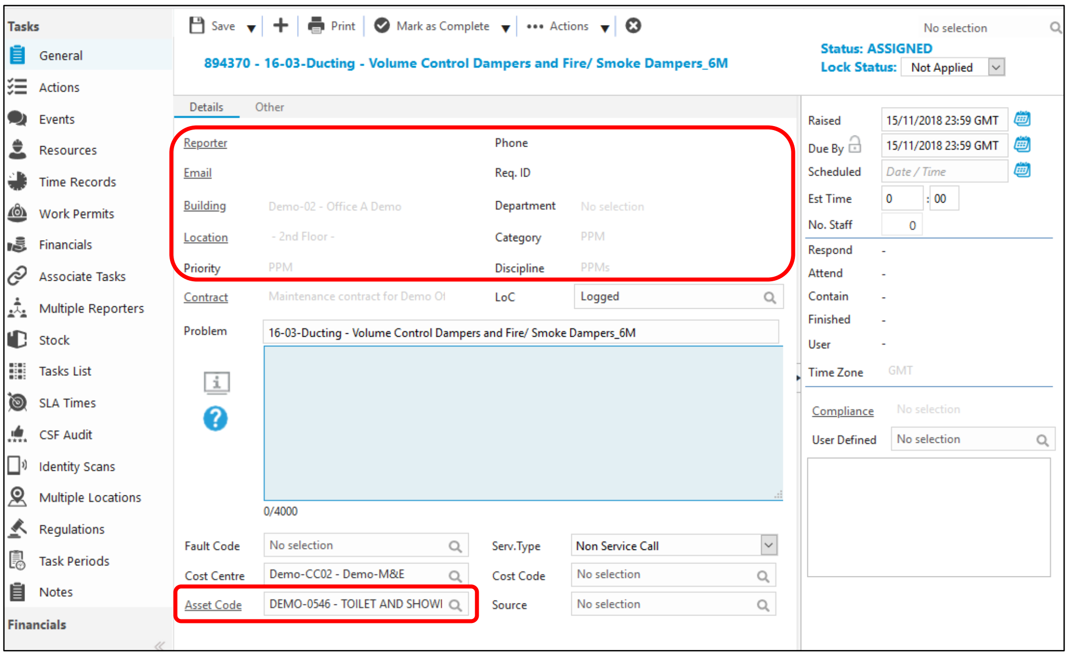


PPM and Reactive tasks are managed in the same way, but it is important to know the differences.

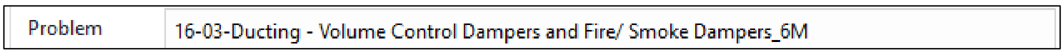
1. Log into Concept
2. Click **Task Management** from the bottom left corner
3. Click **Tasks** on the menu above
4. Locate and open a PPM task

TIP – use the Task Type column and search for PPM

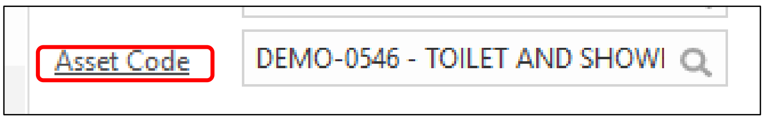
5. Notice that the PPM task does not contain any Reporter data, the fields above the Description are read only and at the bottom of the screen there is an Asset Code



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



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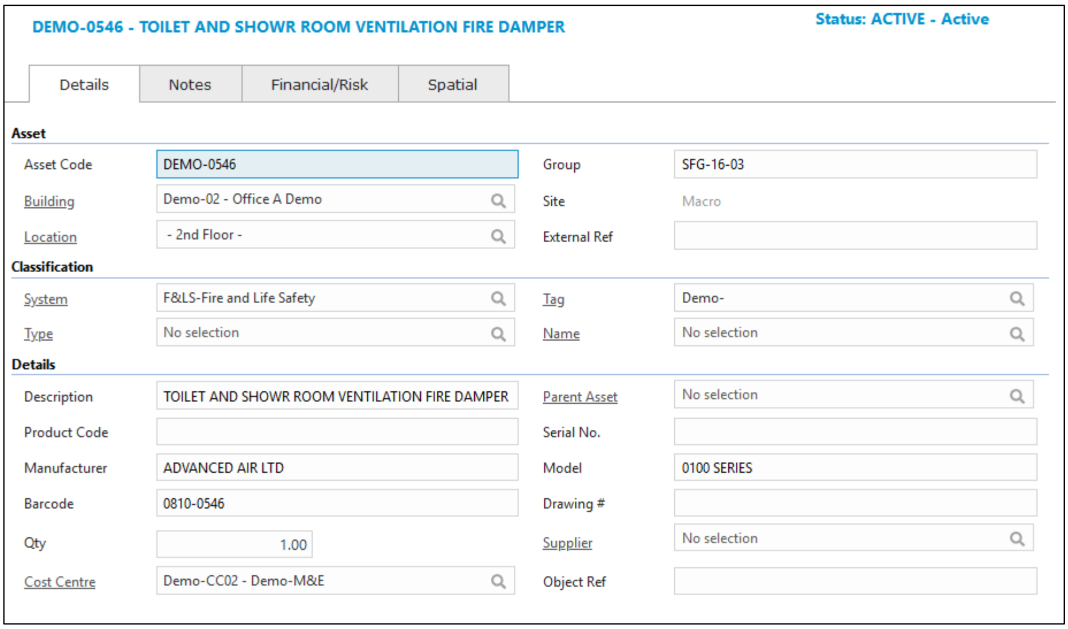
8. If there is not enough room to see the details from the task window, you can click onto the **Asset Code** label (which is a link) and a pop-up window will show you the asset details.

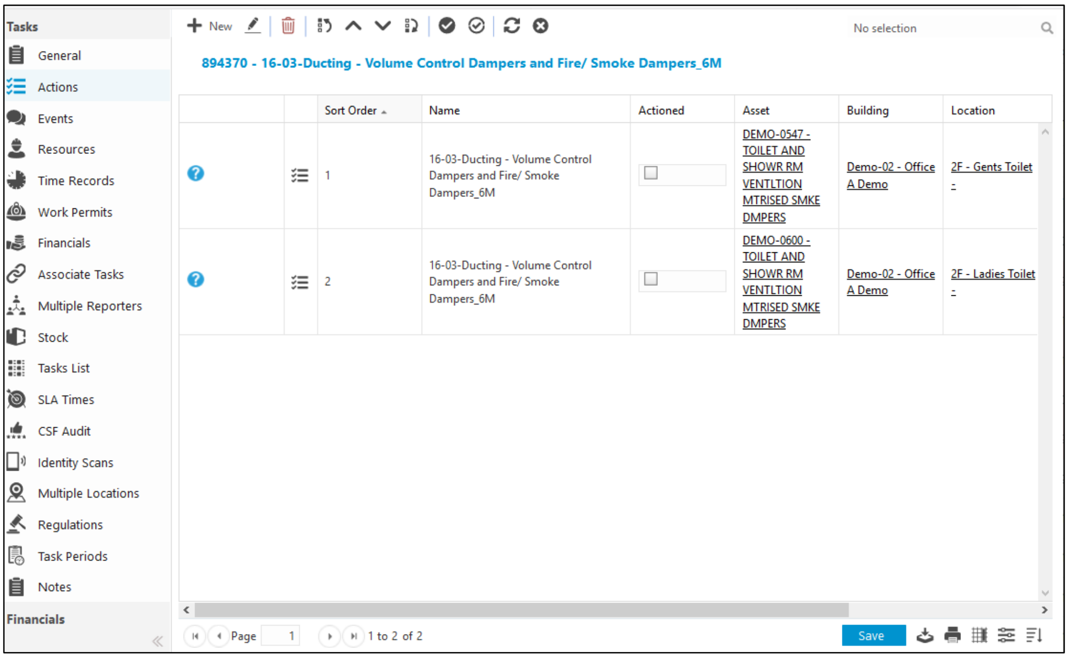


9. If you don't have permissions to see the Asset Details, please speak with your line manager and email Concept Admin to add this to your profile.

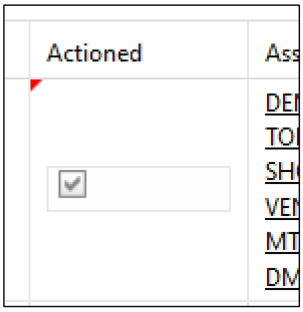
Using the Actions Menu (for PPM Tasks)

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

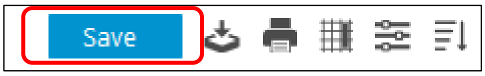
1. Log into Concept
2. Click **Task Management** from the bottom left corner
3. Click **Tasks** on the menu above
4. Locate and open a PPM task
5. Navigate to the **Actions** menu on the left



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



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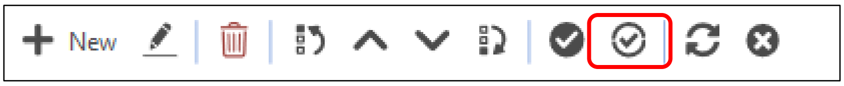
10. Alternatively, you can click the **Mark all actions as actioned** icon to tick all the actions and saves these changes



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

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