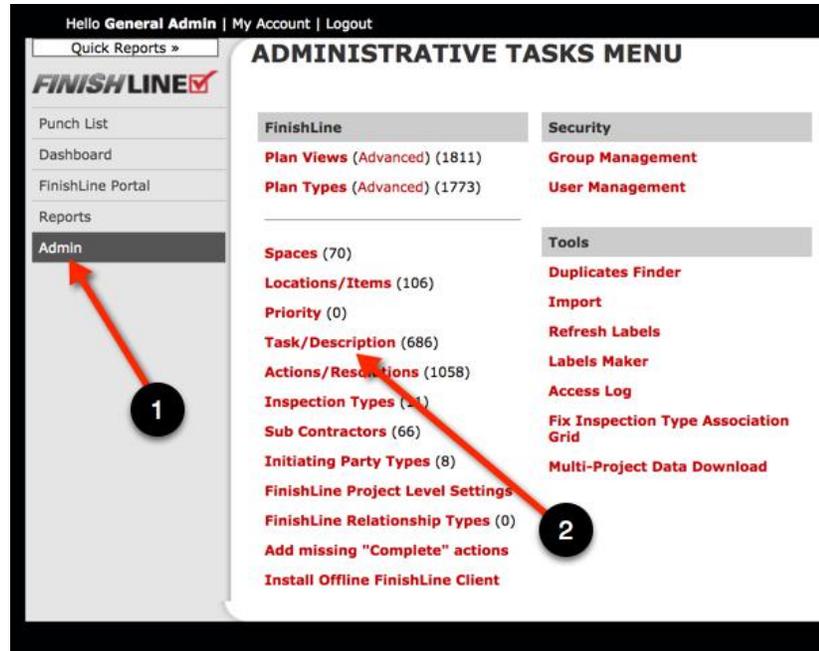


Admin: Add a New Description

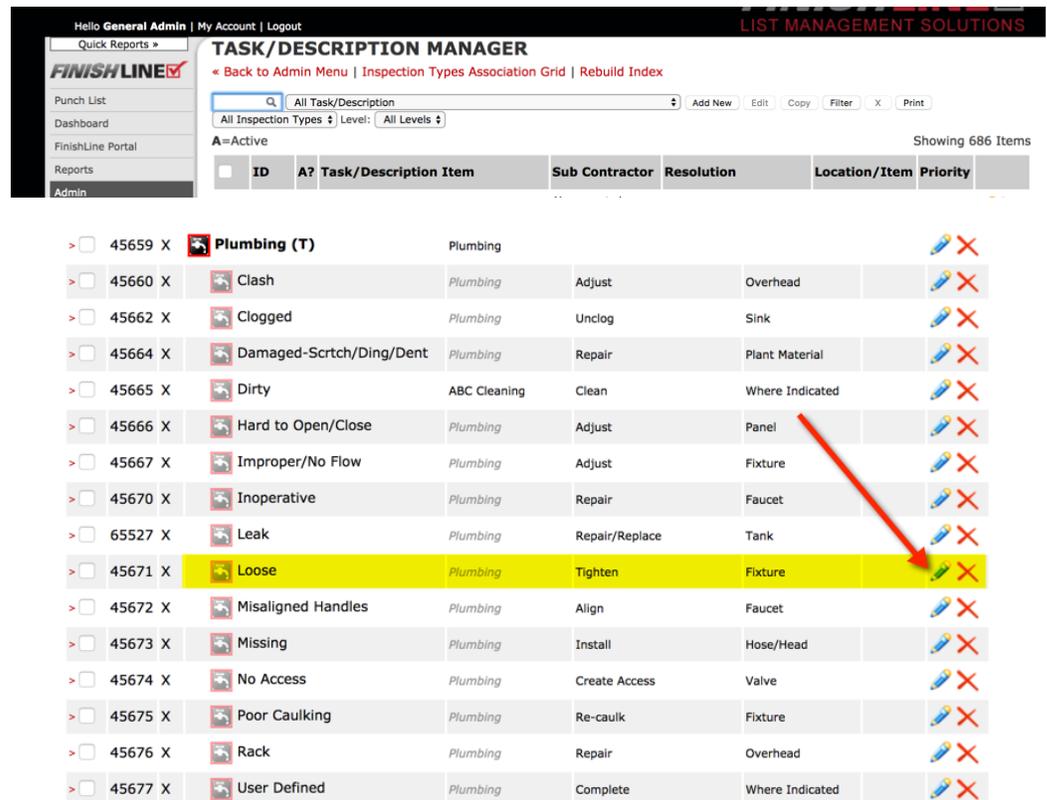
To add a new Description, from the Administrative Tasks menu click on the **Task/Description** link.



Say you want to add a new description under Plumbing.

The easiest and quickest way to add a new Description is to edit an existing Description that already exists under Plumbing by using the save and copy technique.

From the Task/Description Manager, edit any existing Description under Plumbing by clicking on the blue edit pencil.



Since we want to add the new Description of "Wrong Fixture" to the Task of "Plumbing", we have chosen to Save and Copy the existing Description which is "Loose".

Click Save & Copy from the options at the bottom of the page.

The screenshot shows the 'TASK/DESCRIPTION: LOOSE' form. The form includes fields for Full Path (Plumbing (T) / Loose), Parent (Plumbing (T)), Task/Description Name (Loose), and Description (Loose). It also has checkboxes for Active and Selectable, a Comments field, an Icon field, and a 'Show Icon on Plan' option. Below these are dropdown menus for Default Resolution Activity (Tighten), Default Sub-Contractor, Default Location/Item Type (Fixture), and Default Priority. At the bottom, there is a section 'Available in these types' with radio buttons for 'All' and checkboxes for 1-Interior, 2-Exterior, 3-Site, 4-Safety, 5-Checklists, and 6-Maintenance. A red arrow points to the 'Save & Copy' button.

Click OK on the pop-up box when it asks you if you want to copy this record.

The screenshot shows the same 'TASK/DESCRIPTION: LOOSE' form, but with a confirmation dialog box overlaid. The dialog box contains the text: 'Are you sure you want to copy this record? Clicking OK will duplicate the current object and automatically take you to the duplicated object, which will be named by default 'Copy of Loose''. There are 'Cancel' and 'OK' buttons. A red arrow points to the 'OK' button.

You will need to update a number of things.

- 1) Update the Description Name.
- 2) Update the Description Info.
- 3) Update the default values of Resolution Activity, subcontractor and location.

Remember that these values become part of the new Description.

Now Save it.

Done. The new Description has been saved.

ID	A?	Task/Description Item	Sub Contractor	Resolution	Location/Item	Priority
45659	X	Plumbing (T)	Plumbing			
45660	X	Clash	Plumbing	Adjust	Overhead	
45662	X	Clogged	Plumbing	Unclog	Sink	
45664	X	Damaged-Scratch/Ding/Dent	Plumbing	Repair	Plant Material	
45665	X	Dirty	ABC Cleaning	Clean	Where Indicated	
45666	X	Hard to Open/Close	Plumbing	Adjust	Panel	
45667	X	Improper/No Flow	Plumbing	Adjust	Fixture	
45670	X	Inoperative	Plumbing	Repair	Faucet	
65527	X	Leak	Plumbing	Repair/Replace	Tank	
45671	X	Loose	Plumbing	Tighten	Fixture	
45672	X	Misaligned Handles	Plumbing	Align	Faucet	
45673	X	Missing	Plumbing	Install	Hose/Head	
45674	X	No Access	Plumbing	Create Access	Valve	
45675	X	Poor Caulking	Plumbing	Re-caulk	Fixture	
45676	X	Rack	Plumbing	Repair	Overhead	
45677	X	User Defined	Plumbing	Complete	Where Indicated	
71410	X	Wrong fixture	XYZ Plumbing	Replace	Fixture	