How to create a Planned WO (work order)?

help.fracttal.com/hc/en-us/articles/24948048839693-How-to-create-a-Planned-WO-work-order

Generating a Work Order from the Kanban view:

Once a task plan has been established and linked to an asset, the tasks included in the said plan will appear as "Work Queues" (Note, work queue items are created by a scheduled date or event trigger, depending on the type of trigger linked to the task plan).

1. In the Kanban view, select the specific item or items from the work queue that you would like to generate as active planned work orders

2. Once selected, click the "+ New WO" button located at the top right-hand side of the screen

3. After clicking on "New WO" the system will open a window where all the necessary fields for the generation of said planned work order must be configured (these fields are described below).

Generate WO

	Asset	Task	Task type	Actual Schedule Date	Planned Maintenance	Estimated Duration	Priority	Task Group 1	Task Group 2	Equipment downtime?
🗑	PROCESO { PROC-01 }	EVALUACIÓN DE EQUIPO	ASISTENCIA	2025-03-26	PLAN DE MTTO EQUIPO DE BIOMEDICA	00D 00H 10mins	Very High			No
🗑	{ Robus-2 } INOVA TP 924	FALLA DETECTADA	00 Correctivo	2025-03-25		00D 00H 10mins	Medium			No

Responsible *: Jonas Campos

Actual Duration: 000:20

Creation mode: All Tasks in one WO

It depends on another WO?: Select parent WO

☐ Approve WO Budget

Required field descriptions:

- **Responsible:** The person who will appear as responsible for the work order, the signature of this individual will appear on the printed work order.

- **Type of employee:** An option that establishes the type of person (In-house Personnel or Third Party) who will be responsible for the work order.

- **Estimated duration:** Refers to the estimated duration to carry out the tasks contained in the work order (it is the sum of the times of each task).

- **Creation mode:** An option that allows the user to establish if the selected tasks will all be included in a single work order, or if a work order will be generated per asset or per task.

- **It depends on another WO:** If the current work order is derived from or linked to another work order, select the parent work order function**.** An option that allows you to identify whether the generation of said work order is a consequence of a previous works order.

- **Approved by budget:** An option that allows for the establishing, creation and approval of a budget as mandatory so that the work order can be edited.
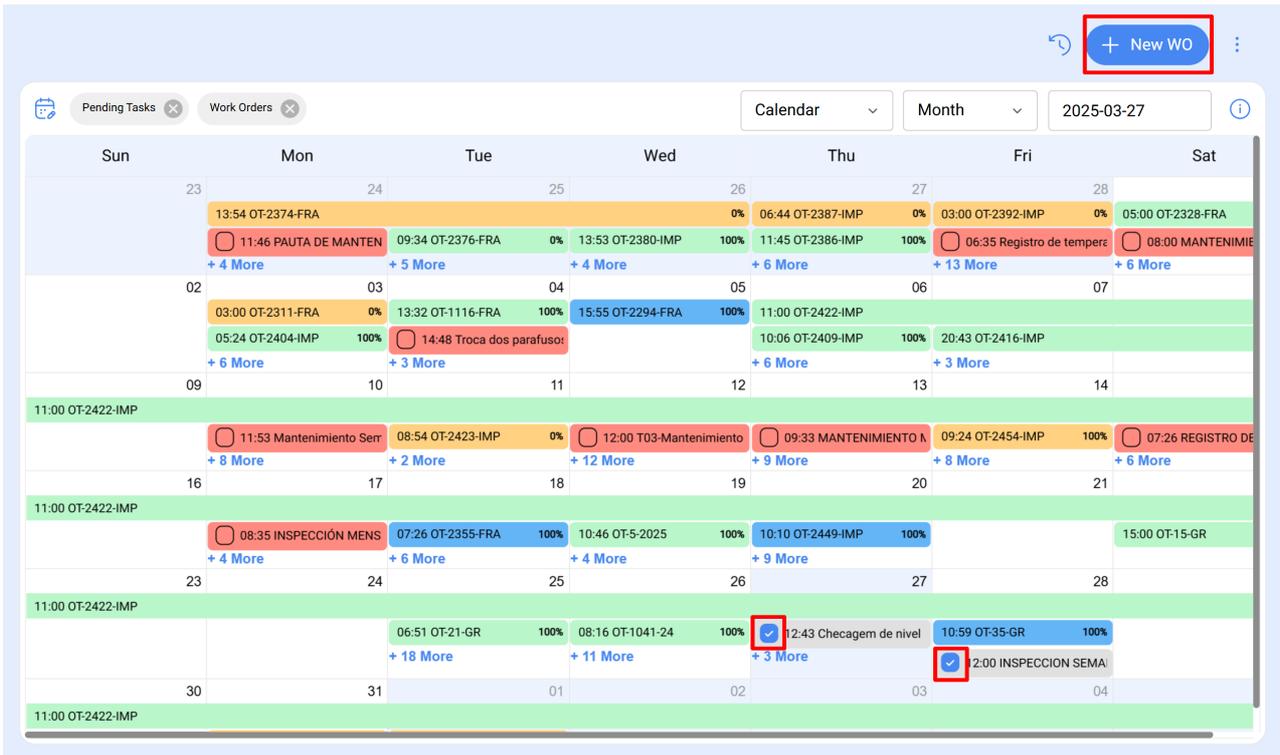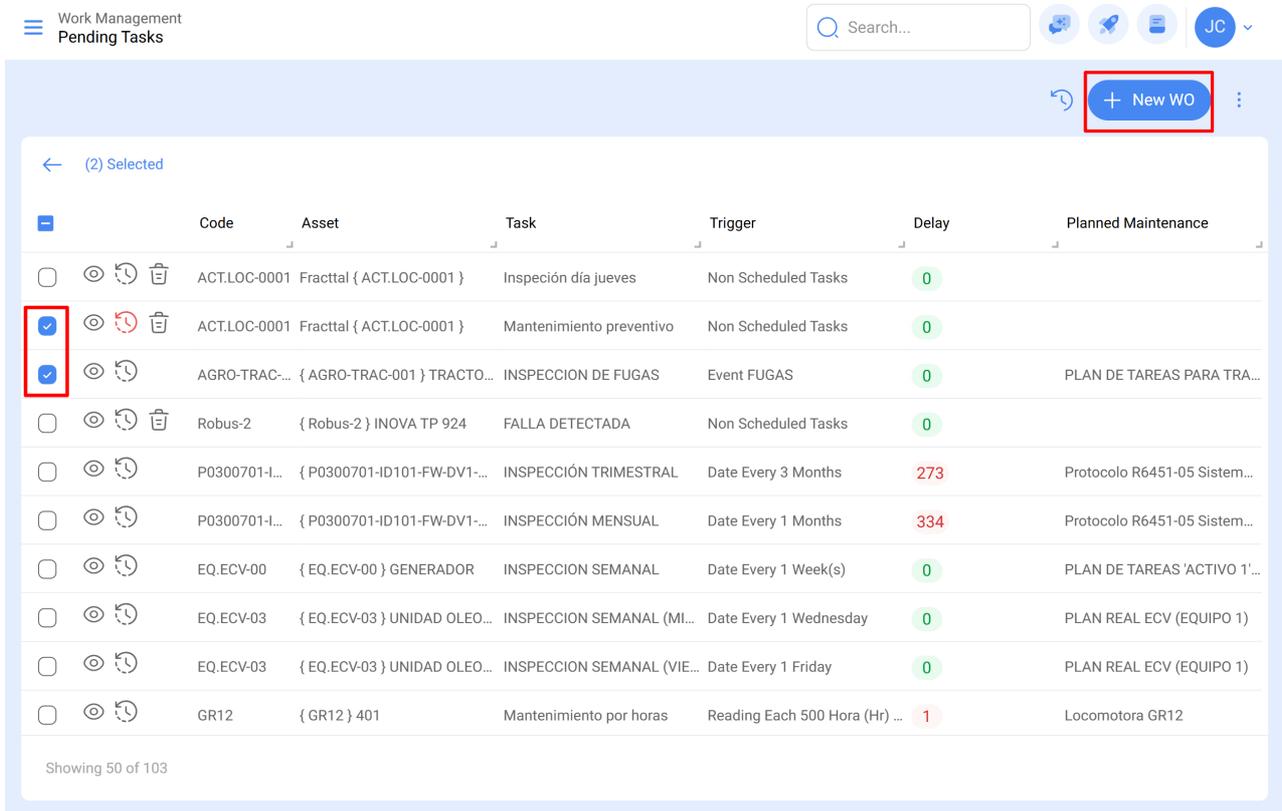
Generating a Work Order from the Calendar View:

To generate a work order from the Calendar view,

1. Click on the item in the calendar that has the pending task in question, this will enable the editing bar at the top of the window.

2. Click on the "Add New WO" button

3. In the Generate Work Order window, fill in the required options related to the work orders.

4. Finally, click the "Generate WO" button to create the work order.

Generating a Work Order from Work Queues in the List View:

To generate a work order from the Work Queues in the List View,

1. In the List View, select the specific work queues from the list that you would like to generate as active work orders

2. Once selected, click the "+ New WO" button located at the top right-hand side of the screen

3. In the Generate New Work Order window, fill in the required fields.

4. When all the required field are completed, click the "Generate WO" button to create the work order.

Generate WO

Responsible *

Jonas Campos

Actual Duration

100:10

Creation mode

All Tasks in one WO

It depends on another WO?

Select parent WO

☐ Approve WO Budget

		Asset	Task	Task type	Actual Schedule Date	Planned Maintenance	Estimated Duration	Priority	Task Group 1	Task Group 2	Equipment downtime?
🗑	▣	Fracttal { ACT.LOC-0001 }	Mantenimiento preventivo	06 Preventivo	2025-03-29		04D 04H 00mins	Low	04 Operador sin unidad	2022-2023 Mantenimiento Mayor	No
🗑		{ AGRO-TRAC-001 } TRACTOR 1	INSPECCION DE FUGAS	06 Preventivo	2025-03-26	PLAN DE TAREAS PARA TRACTORES MODELO ALEXANDER	00D 00H 10mins	Medium			No