

How to Edit and Complete a Work Order?

help.fracttal.com/hc/en-us/articles/24891461518861-How-to-Edit-and-Complete-a-Work-Order

To edit or complete a Work Order (WO), you can access any of the views associated with the Work Orders module (Kanban view, Timeline, and List). In this case, once the WO is generated, you simply need to click on the respective WO (or task, if in List view) to initiate the editing process.

For the Kanban view:

By selecting a WO and clicking on it, a new window will be opened, displaying general information about the WO, along with the tasks included in that specific WO.

The screenshot displays the 'Work Management View Kanban' interface. It features four columns representing different stages of work orders: 'Pending Tasks' (174 items), 'WOs in Process' (2744 items), 'WOs in Review' (215 items), and 'Closed WOs' (2431 items). Each column contains several work order cards. The 'WOs in Process' column is highlighted with a red border, showing a card for 'OT-46-GR' created by Jonas Campos. This card details an asset '(MON-FA-0001) MONTADORA - FA' with a task 'LIMPIEZA Y CORTE' that is 50% complete. Other cards in the 'WOs in Process' column include 'OT-44-GR' (0% complete), 'OT-43-GR' (0% complete), and 'OT-39-GR' (0% complete). The 'WOs in Review' column shows cards like 'OT-35-GR' (100% complete), 'OT-24-GR' (100% complete), 'OT-18-GR' (100% complete), and 'OT-14-GR' (100% complete). The 'Closed WOs' column includes cards such as 'OT-49-GR' (100% complete), 'OT-47-GR' (100% complete), 'OT-45-GR' (CANCELLED), and 'OT-42-GR' (100% complete). Each card provides information on the asset, task, completion percentage, due date, and the responsible user.

The image displays two screenshots of a Work Order (WO) management system interface. The top screenshot shows the main overview of a WO, and the bottom screenshot shows a detailed view of a specific task within that WO.

Top Screenshot (Main Overview):

- 1:** Assigned Technician Name: Jonas Campos
- 2:** Scheduled Date: 2025-03-27
- 3:** Estimated Duration: 00:40
- 4:** Task ID: OT-46-GR
- 5:** Save icon
- 6:** Progress indicator: 00:01
- 7:** Note field
- 80%:** Progress bar
- Total cost:** \$ MXN 0,00
- Work Management:** Section with two task cards: { MON-FA-0001 } MONTADORA - FA

Bottom Screenshot (Detailed Task View):

- 8:** Task ID: { MON-FA-0001 } MONTADORA - FA
- 9:** Task type: Inspeccion
- 10:** Task details: Priority: Medium, Task type: INSPECCION, Group 1, Group 2, Work Request Num..., Actual Schedule Dat...: 2025-03-27, Estimated Duration: 00:30:00
- 11:** RESOURCES 1
- 12:** ATTACHMENTS 1
- 13:** Status: COMPLETED
- 14:** Task details (right): INSPECCION, Priority: Medium, Task type: INSPECCIÓN, Group 1, Group 2, Work Request Num..., Actual Schedule Dat...: 2025-03-27, Estimated Duration: 00:10:00
- 15:** RESOURCES 0 | ATTACHMENTS 0
- 16:** Status: NOT STARTED

Let's identify the various options available in this view once we've clicked on a task in progress

- 1. Assigned Technician Name:** This section displays the name of the technician responsible for the Work Order (WO).
- 2. Scheduled Date:** Shows the planned date for task execution. To start and complete the WO, you need to click on the desired task.

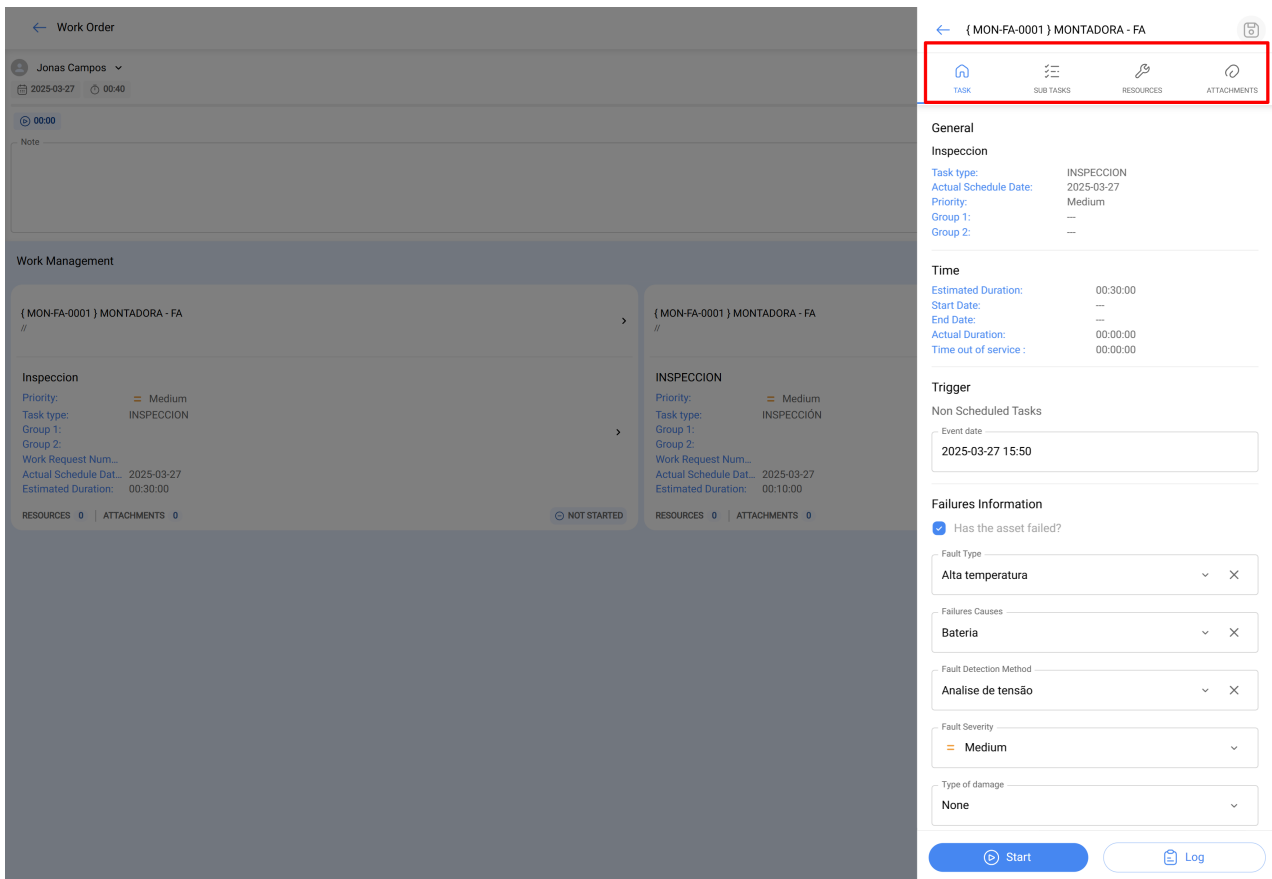
3. **Estimated Total Duration:** Represents the estimated downtime of the asset. In the case of multiple tasks with specific durations (e.g., 20 minutes each), the system sums these times, providing a cumulative total (e.g., 40 minutes).
4. **Work Order Consecutive with Prefix and Suffix:** This shows the unique consecutive number of the WO, along with its configured prefix and suffix. This information specifically identifies the WO within the system.
5. **Save Button:** Allows you to save any changes made to the WO.
6. **Actual Execution Time:** Reflects the actual time spent by the technician to execute the task.
7. **Notes:** This space allows comments to be added for immediate viewing.
8. **Asset Visualization:** Through this icon, you can access information about the asset being intervened or that is being intervened.
9. **Activity Type:** Displays the type of activity to be carried out.
10. **Task Information:** Provides details such as task type, classification 1 and 2, request number (if applicable), scheduled date, and estimated duration.
11. **Resources:** Indicates the amount of resources that will be or have been used in the WO.
12. **Attachments:** Displays the number of files attached to the WO.
13. **Status:** Indicates the progress level of the task in execution.

Note:

It's important to consider that each task is independent and has its own execution times, even if there are multiple tasks within the same Work Order (WO). This approach allows for individual traceability for each task in terms of time and resources used.

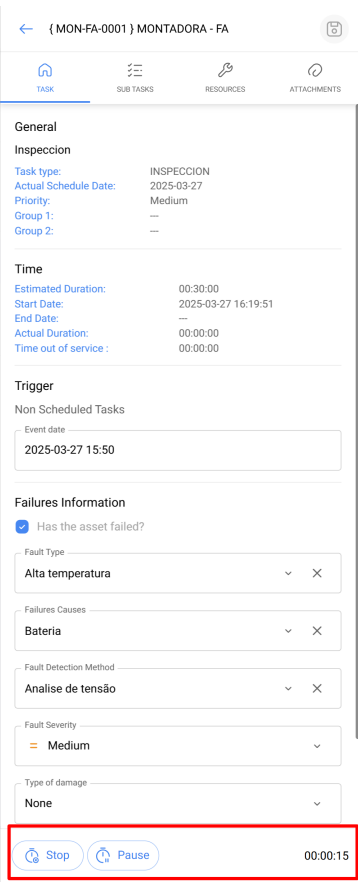
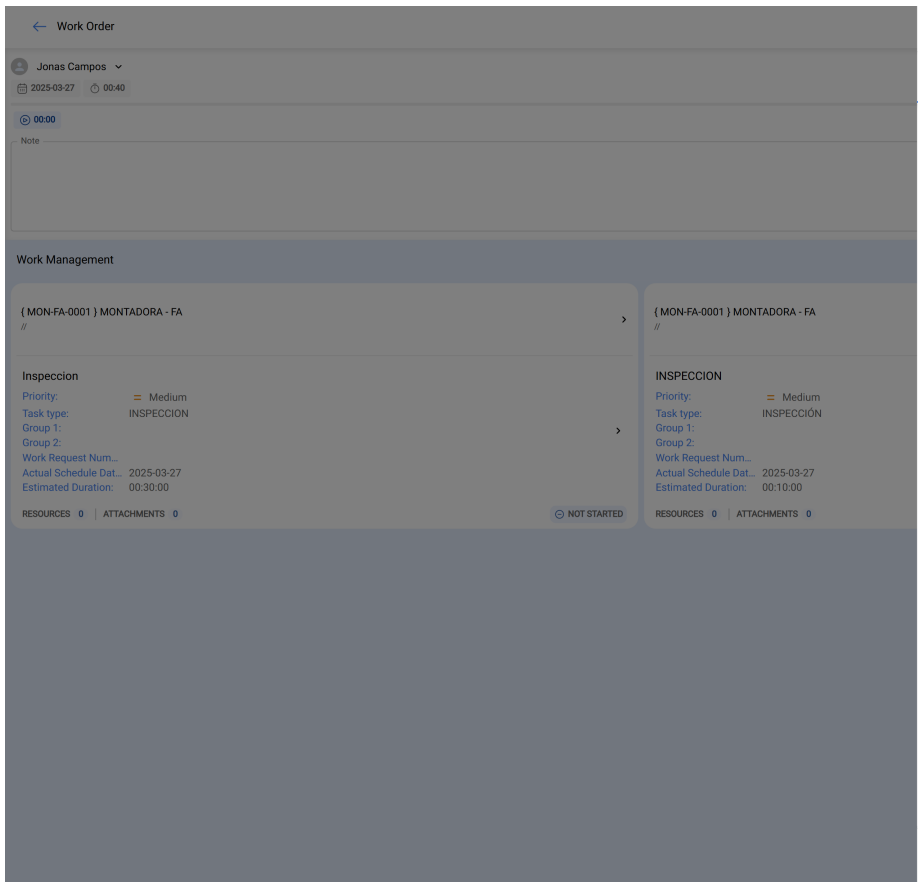
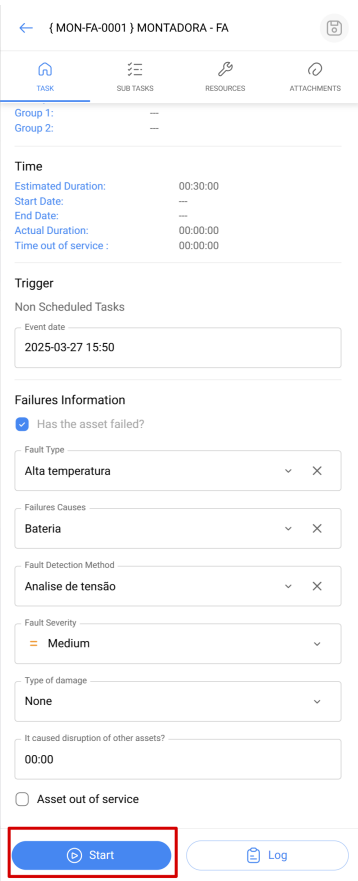
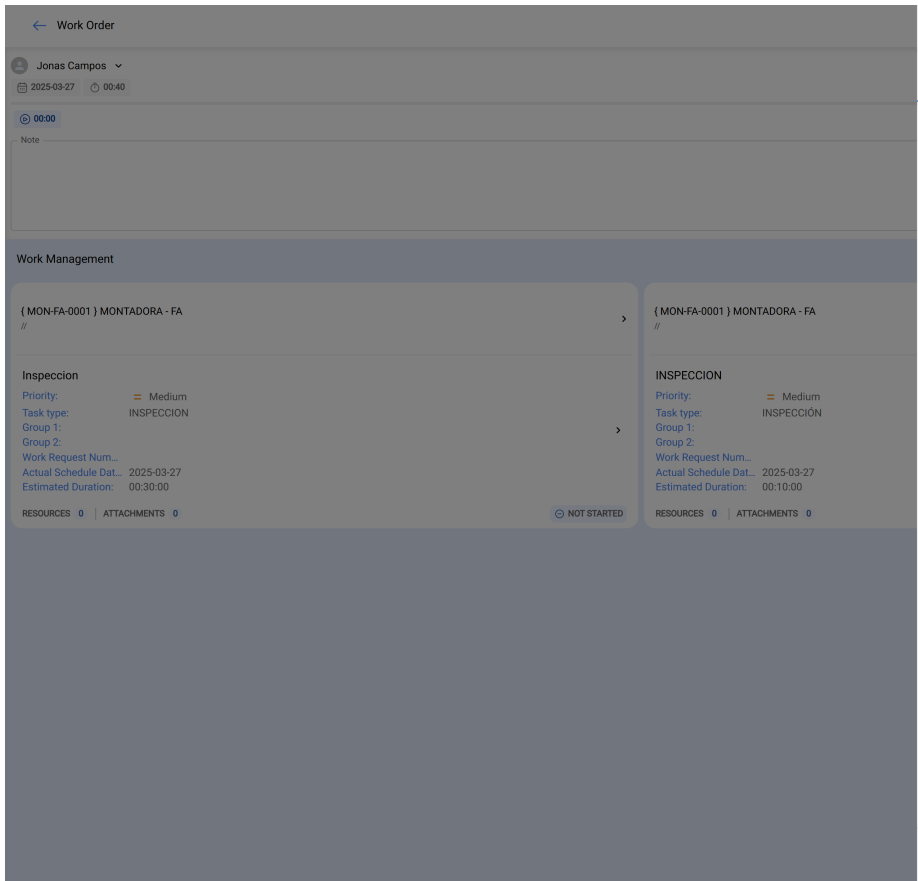
The screenshot displays a 'Work Order' management interface. At the top, there's a navigation bar with a back arrow, 'Work Order', a 'Save' button, and a user profile for 'Jonas Campos'. Below this, a header section shows the date '2025-03-27' and a time '00:40'. A progress indicator shows '0%' completion and a 'Total cost: \$ MXN 0,00'. A 'Note' field is present but empty. The main section is titled 'Work Management' and shows two task cards side-by-side, both for the work order '{ MON-FA-0001 } MONTADORA - FA'. The left card is titled 'Inspeccion' and has a priority of 'Medium', task type 'INSPECCION', and an estimated duration of '00:30:00'. The right card is titled 'INSPECCION' and has a priority of 'Medium', task type 'INSPECCION', and an estimated duration of '00:10:00'. Both cards show 'Actual Schedule Dat...' as '2025-03-27'. At the bottom of each card, there are indicators for 'RESOURCES 0' and 'ATTACHMENTS 0', and a 'NOT STARTED' status.

After entering the task, the system will open a window where each of the necessary requirements to execute the task can be completed. Below is a brief description of each editable field:



- **Task:** This section contains fundamental information about the task, including Type, Priority, and Classifications. It also provides insights into Timings (start and end times, execution time, etc.), along with details about the associated Trigger type.
- **Sub tasks :** In this tab, all steps or checklists essential for task completion are outlined. It serves as a comprehensive guide to ensure each aspect of the task is addressed thoroughly.
- **Resources :** Here, various resources, including Human Resources, Inventories, Services, etc., crucial for task execution and fulfillment, can be added and managed efficiently.
- **Attachments:** This section allows users to view attachments from a task plan. Additionally, it provides the capability to add new attachments, serving as evidence linked to the execution of the task.

Upon entering the "General" tab, the initial step is to commence the activity by clicking the "Start" button. This action triggers the recording of execution times, marking the official start of the task



Upon initiating the task, the following options will be activated:

- **Stop:** This option corresponds to completing the task once all required fields are filled out, marking the task as concluded.

- **Pause:** This option allows recording effective working time, excluding intermediate breaks during task execution. Upon initiating a pause, a registration window will open, where the reason for the pause should be identified, along with a brief descriptive note. The activity can be resumed by clicking on the "Resume" option, and records associated with pauses can be viewed in the "Records" option.

Note: If there is a need to manually record time (without using the start and pause timer), you can access the "Records" button by following these steps:

The screenshot displays a mobile application interface for task management. The left panel shows a 'Work Order' for 'Jonas Campos' on '2025-03-27' at '00:40'. The main area is titled 'Work Management' and shows two task cards for '{ MON-FA-0001 } MONTADORA - FA'. The left card is for 'Inspeccion' with a priority of 'Medium', task type 'INSPECCION', and an estimated duration of '00:30:00'. The right card is for 'INSPECCION' with a priority of 'Medium', task type 'INSPECCIÓN', and an estimated duration of '00:10:00'. The right panel shows details for the selected task, including 'General' information (Task type: INSPECCION, Actual Schedule Date: 2025-03-27, Priority: Medium), 'Time' information (Estimated Duration: 00:30:00, Start Date: 2025-03-27 16:19:51, End Date: 2025-03-27 16:20:14, Actual Duration: 00:00:24, Time out of service: 00:00:00), 'Trigger' information (Non Scheduled Tasks, Event date: 2025-03-27 15:50), and 'Failures Information' (Has the asset failed? checked, Fault Type: Alta temperatura, Failures Causes: Bateria, Fault Detection Method: Analise de tensão, Fault Severity: Medium, Type of damage: None). At the bottom, there are 'Start' and 'Log' buttons, with the 'Log' button highlighted by a red box and a red '1' next to it.

← Work Order

Jonas Campos

2025-03-27 00:40

00:00

Note

Work Management

{ MON-FA-0001 } MONTADORA - FA

Inspeccion

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:30:00

RESOURCES 0 | ATTACHMENTS 0

NOT STARTED

{ MON-FA-0001 } MONTADORA - FA

INSPECCION

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:10:00

RESOURCES 0 | ATTACHMENTS 0

← Task: Inspeccion

Jonas Campos

2025-03-27 16:19:51 - 2025-03-27 16:20:14

Showing 1 of 1

2


← Work Order

Jonas Campos

2025-03-27 00:40

00:00

Note

Work Management

{ MON-FA-0001 } MONTADORA - FA

Inspeccion

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:30:00

RESOURCES 0 | ATTACHMENTS 0

NOT STARTED

{ MON-FA-0001 } MONTADORA - FA

INSPECCION

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:10:00

RESOURCES 0 | ATTACHMENTS 0

← Add Task:

Task: Inspeccion

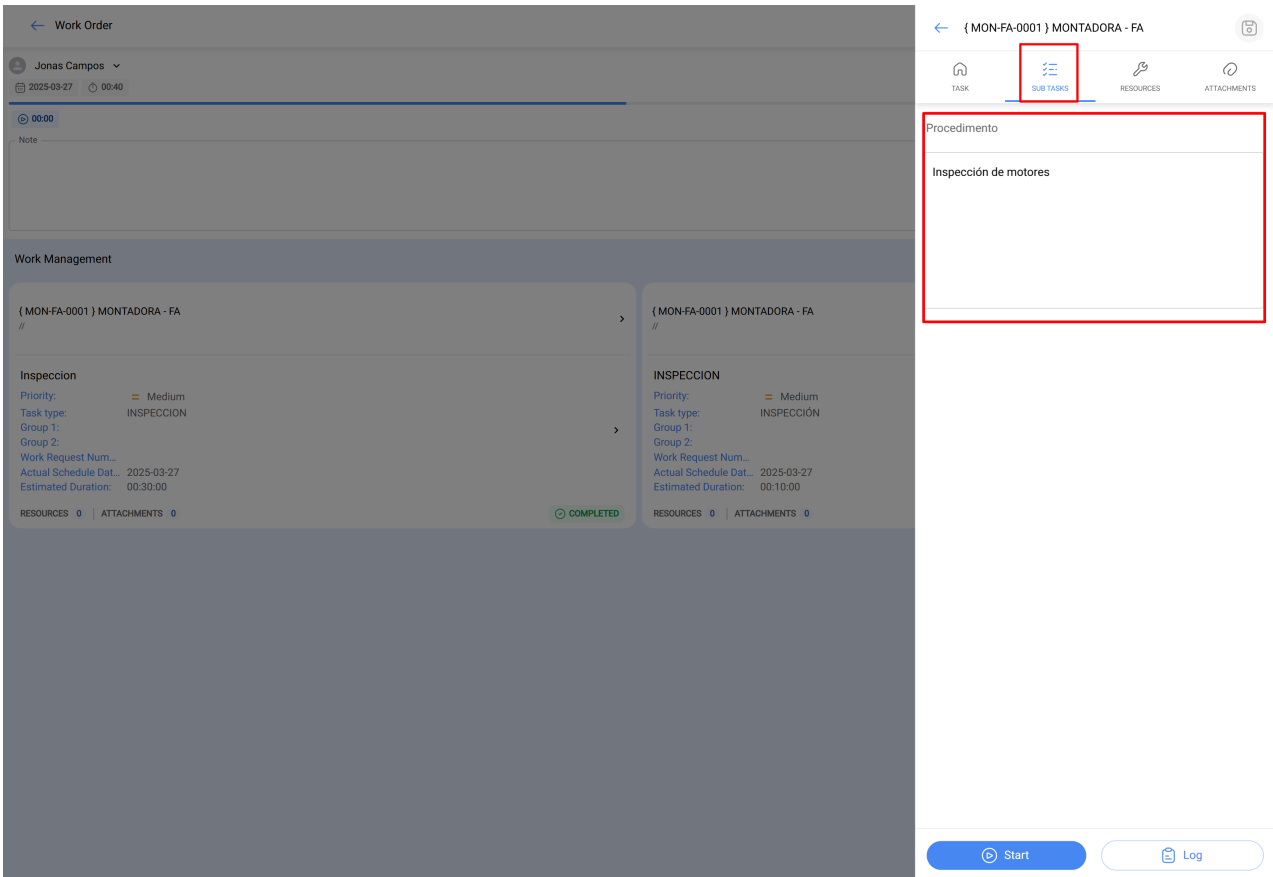
User: Jonas Campos

Start Date: 2025-03-27 16:11

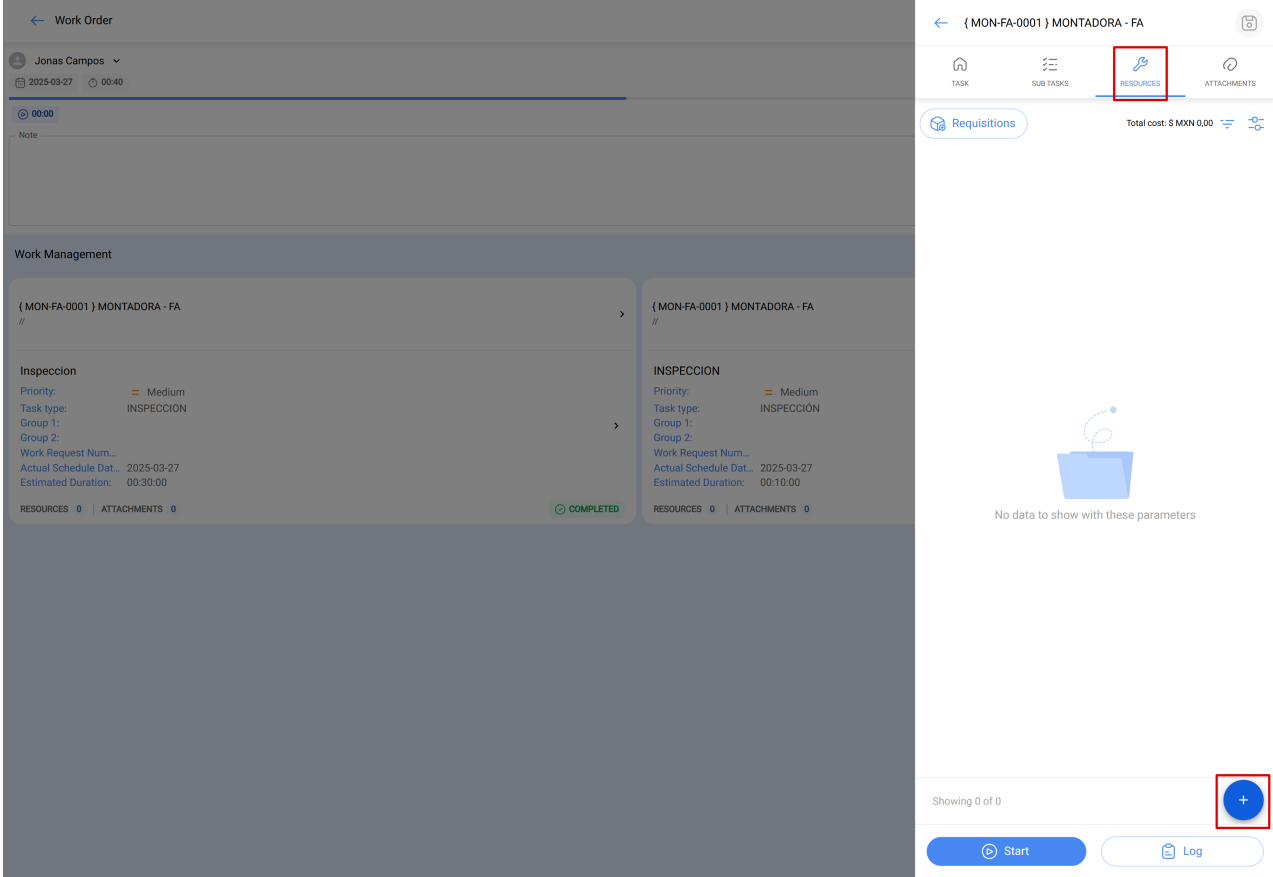
End Date: 2025-03-27 16:21

3

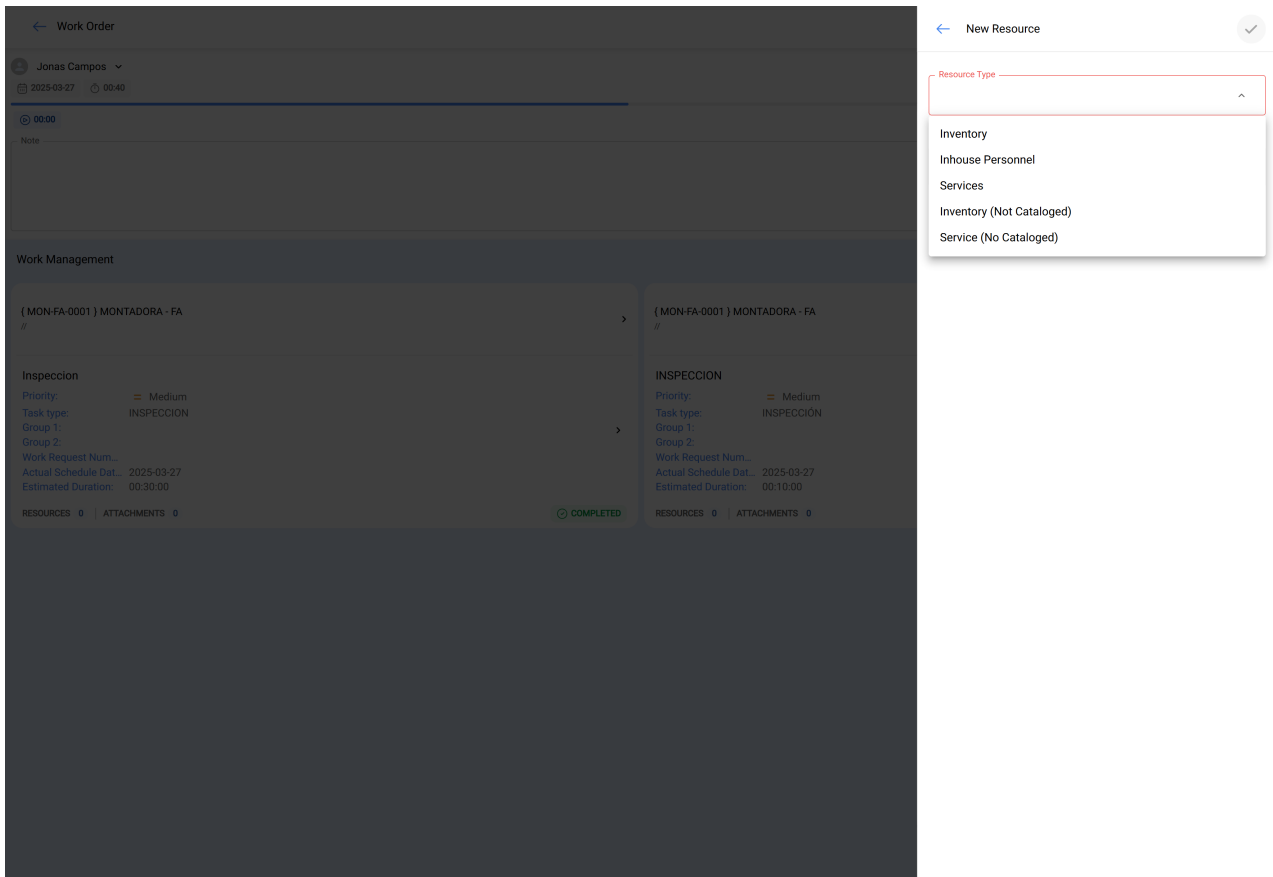
Subsequently, navigate to the "Subtasks" tab to complete each of the required steps or points in the execution of the task.



To add resources, navigate to the "Resources" tab and click on the add symbol located in the bottom right corner of the window.

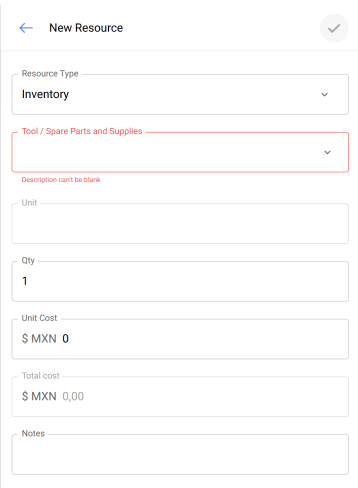
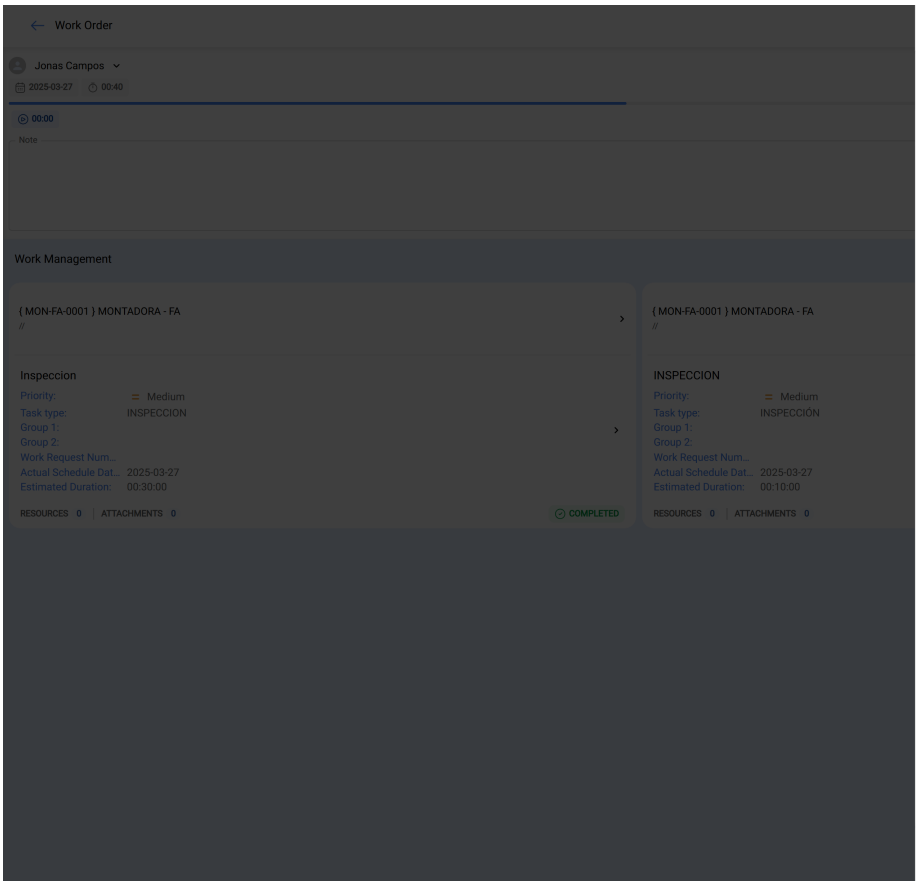


To add resources, navigate to the "Resources" tab and click on the add symbol located in the bottom right corner of the window.

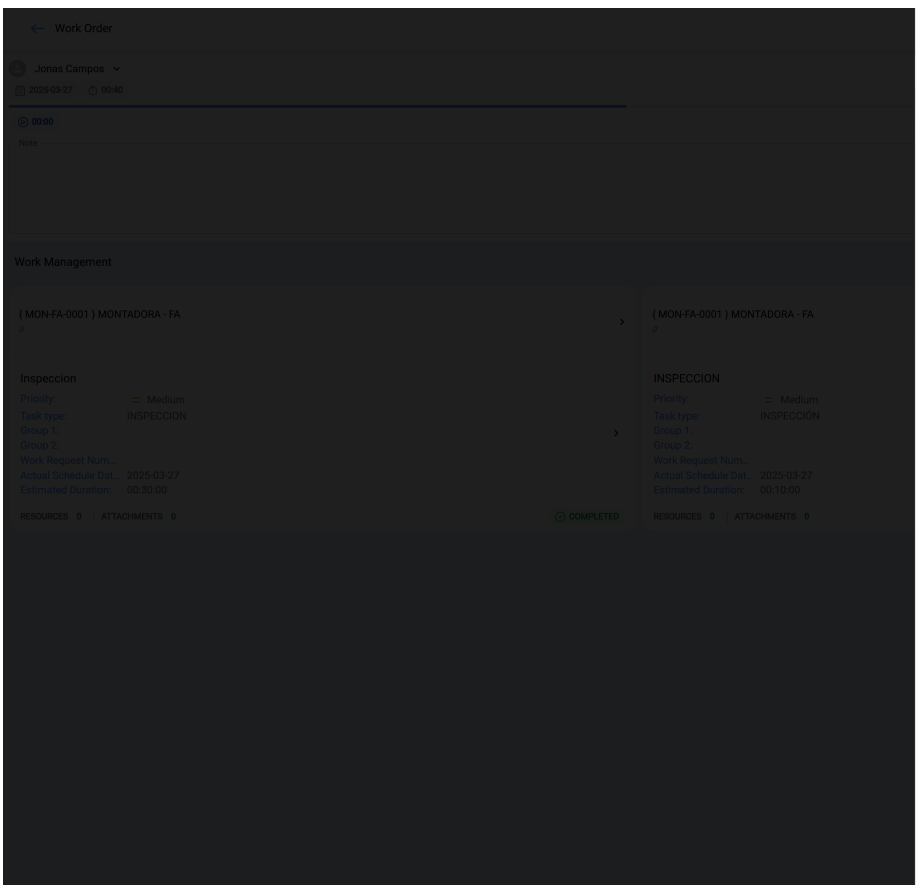


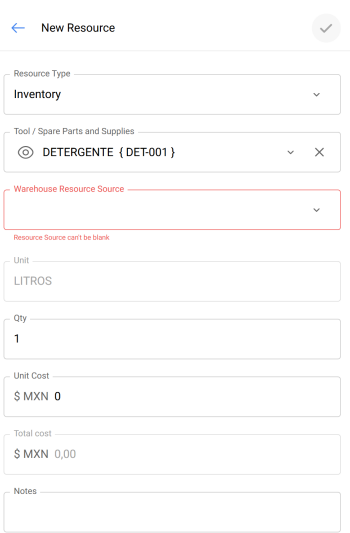
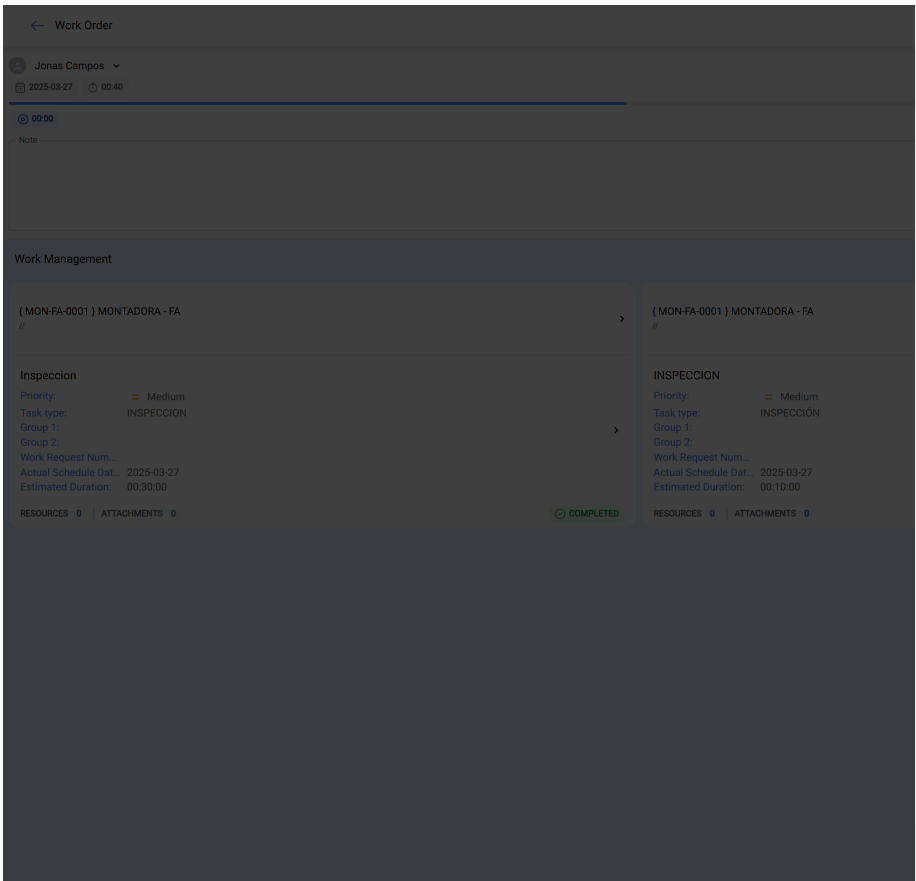
- **Inventory:** Corresponds to resources (Tools, Spare Parts, and Supplies) sourced from a warehouse that are necessary for task execution.
- **Inhouse Personnel:** Corresponds to man-hours that are intended to be accounted for in the Work Order (WO).
- **Services:** Corresponds to costs associated with external services provided by third parties registered in the platform (third-party module).
- **Inventory (No Cataloged):** Corresponds to inventory-type resources that do not originate from a warehouse and thus are not registered in the platform.
- **Service (No Cataloged):** Corresponds to services associated with an external entity not registered in the platform as a third party.

After selecting the resource type, it is necessary to fill in the remaining information, as illustrated in the image.

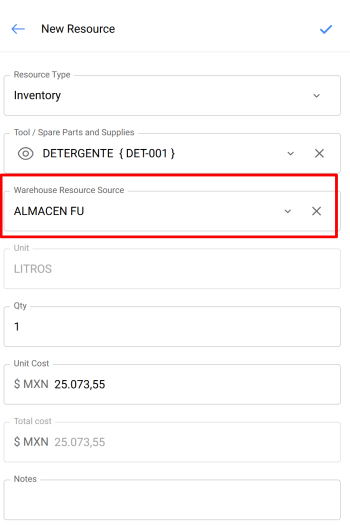
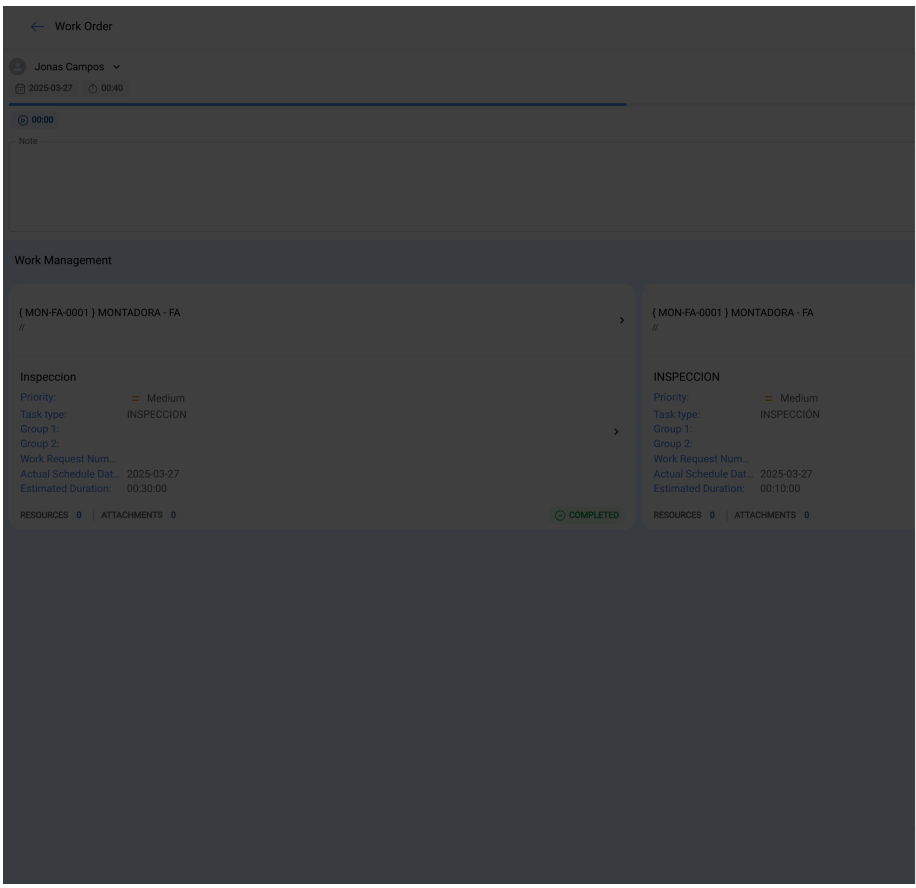


In the previous example, when choosing the inventory option, another category named "Tools/Spare Parts and Supplies" becomes available. This is because, based on the inventory registered in Fractal One, a specific selection of the necessary items will be made.

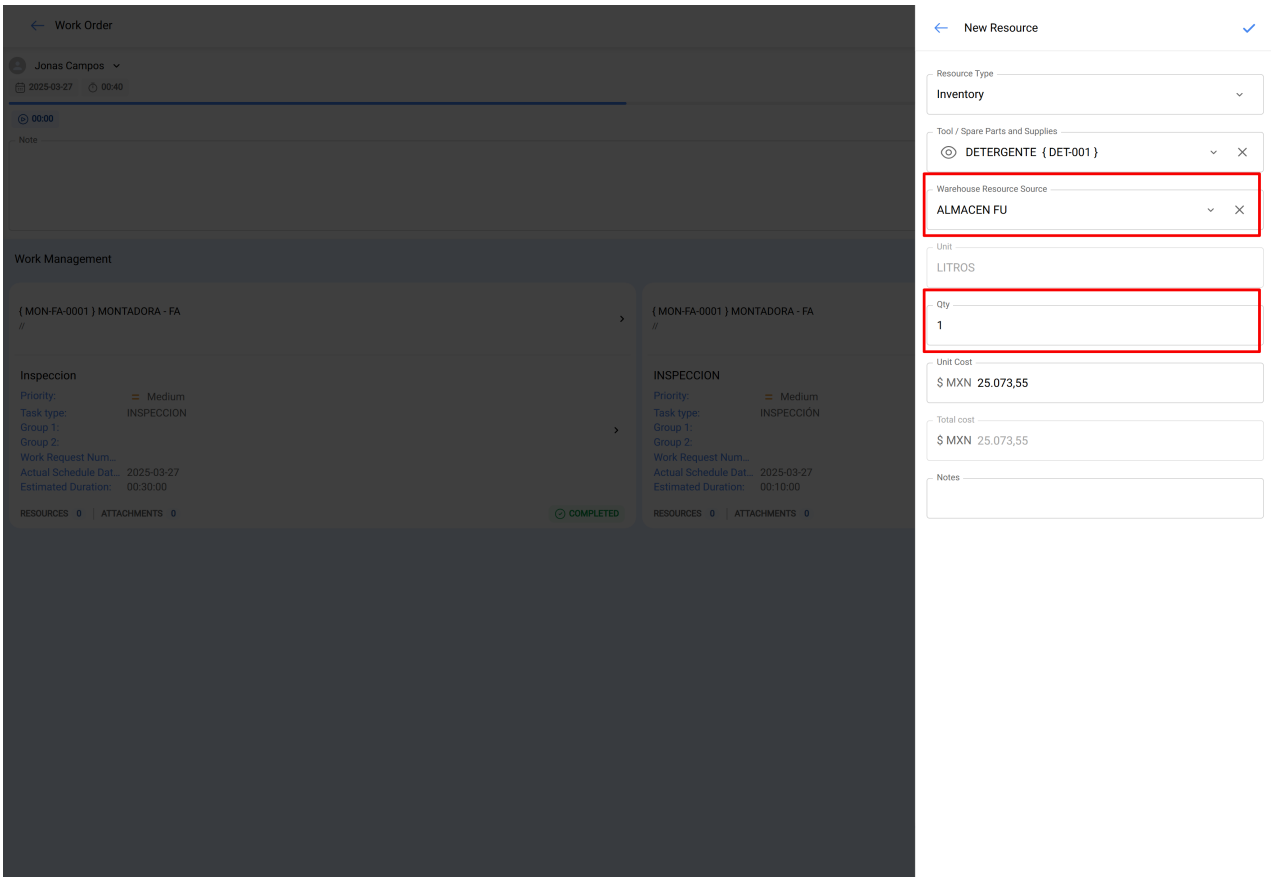




Subsequently, it is necessary to specify the warehouse from which the necessary item will be extracted.



Lastly, specify the quantity of the items to be requested.



Note: All costs associated with cataloged inventories and services come directly from the Warehouses and Third-Party modules.

It is important to mention that when adding an inventory-type resource, a material requisition is automatically generated (both in the Work Order and in the Materials Requisition submodule in warehouses). This requisition serves as a validation document, ensuring that the material order originates from a work order.

← Work Order

Jonas Campos

2025-03-27 00:40

00:00

Note

Work Management

{ MON-FA-0001 } MONTADORA - FA

INSPECCION

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:30:00

RESOURCES 0 | ATTACHMENTS 0

COMPLETED

← { MON-FA-0001 } MONTADORA - FA

TASK SUB TASKS RESOURCES ATTACHMENTS

Requisitions

Total cost: \$ MXN 25,073.55

DETERGENTE (DET-001)

Type: Inventory

Source: ALMACEN FU

Unit Cost: \$ MXN 25,073.55

Total cost: \$ MXN 25,073.55

Creation Date: 2025-03-27 16:23:32

Resource Utilizatio... 2025-03-27 16:23:32

Qty: 1

Issued Qty: 0

Real Used Qty: 0

Showing 1 of 1

Start Log

← Work Order

Jonas Campos

2025-03-27 00:40

00:00

Note

Work Management

{ MON-FA-0001 } MONTADORA - FA

INSPECCION

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:30:00

RESOURCES 0 | ATTACHMENTS 0

COMPLETED

← Material requisitions: Inspeccion

Warehouse: ALMACEN FU (MOV-344-22)

Responsible: Jonas Campos

Approved: No

Status: Not delivered

Showing 1 of 1

After generating the material requisition, the corresponding output should be carried out in the Warehouses module. In this scenario, the material requisition will change its status from "Not Delivered" to Total or Partial Delivery, depending on the circumstances.

← Work Order

Jonas Campos

2025-03-27 00:40

00:00

Note

Work Management

{ MON-FA-0001 } MONTADORA - FA

#

Inspeccion

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:30:00

RESOURCES 0 | ATTACHMENTS 0

COMPLETED

{ MON-FA-0001 } MONTADORA - FA

#

INSPECCION

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:10:00

RESOURCES 0 | ATTACHMENTS 0

← Material requisitions: Inspeccion

Warehouse: ALMACEN FU (MOV-344-22)

Responsible: Jonas Campos

Approved: No

Status: Not delivered

Showing 1 of 1

Once the material has been delivered, the technician completing the Work Order (WO) must verify the actual quantity used. In the event of excess material, a return entry should be made to the warehouse to account for the surplus as a return.

← Work Order

Jonas Campos

2025-03-27 00:40

00:00

Note

Work Management

{ MON-FA-0001 } MONTADORA - FA

#

Inspeccion

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:30:00

RESOURCES 0 | ATTACHMENTS 0

COMPLETED

{ MON-FA-0001 } MONTADORA - FA

#

INSPECCION

Priority: Medium

Task type: INSPECCION

Group 1:

Group 2:

Work Request Num...

Actual Schedule Dat... 2025-03-27

Estimated Duration: 00:10:00

RESOURCES 0 | ATTACHMENTS 0

← { MON-FA-0001 } MONTADORA - FA

TASK SUB TASKS RESOURCES ATTACHMENTS

Requisitions Total cost: \$ MXN 25,073.55

DETERGENTE { DET-001 }

Type: Inventory

Source: ALMACEN FU

Unit Cost: \$ MXN 25,073.55

Total cost: \$ MXN 25,073.55

Creation Date: 2025-03-27 16:25:29

Resource Utilizatio... 2025-03-27 16:25:29

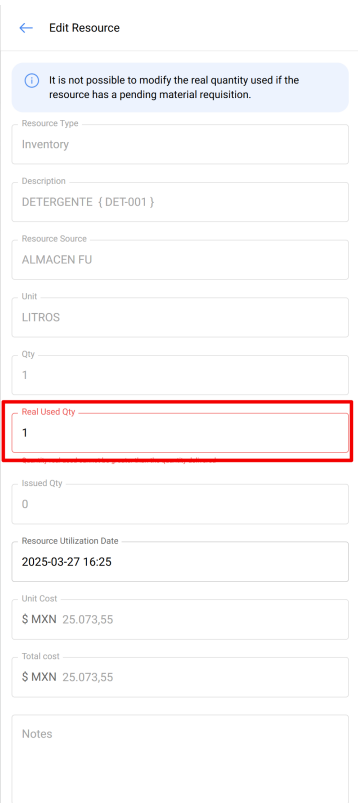
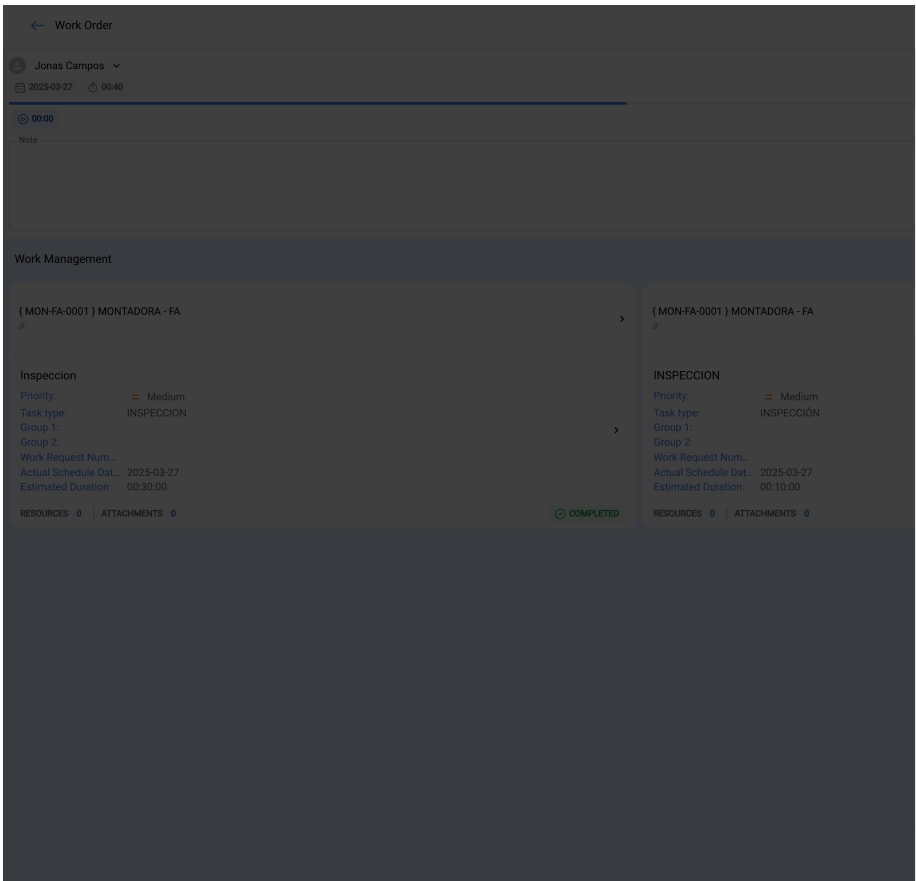
Qty: 1

Issued Qty: 0

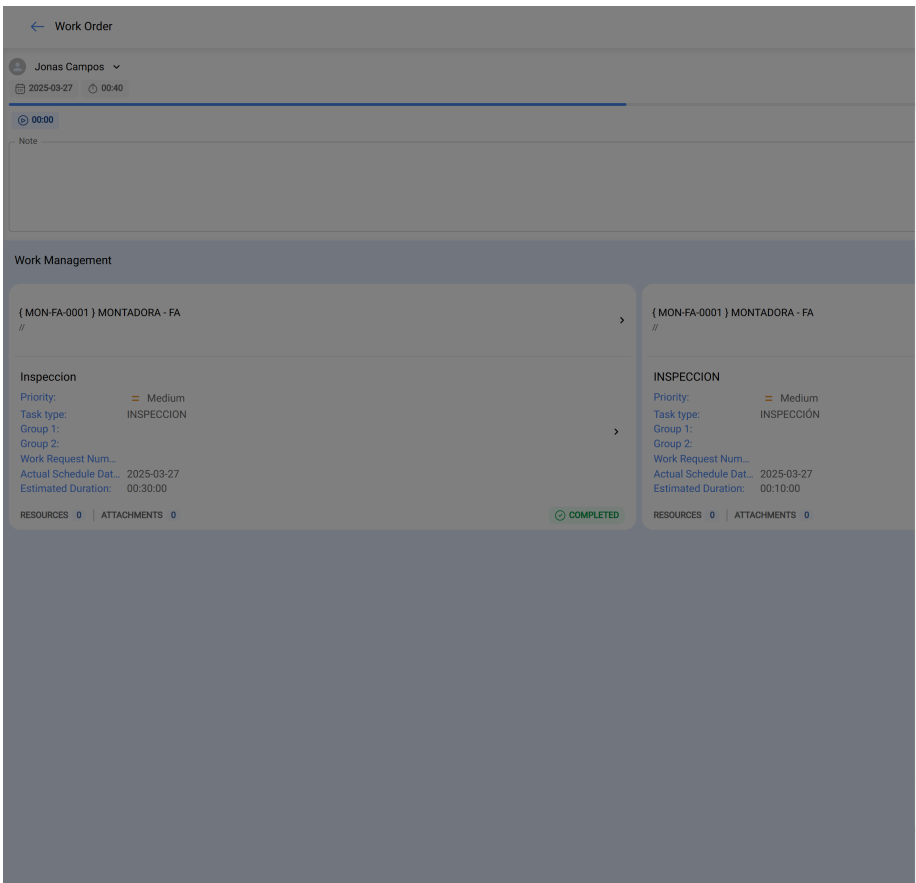
Real Used Qty: 0

Showing 1 of 1

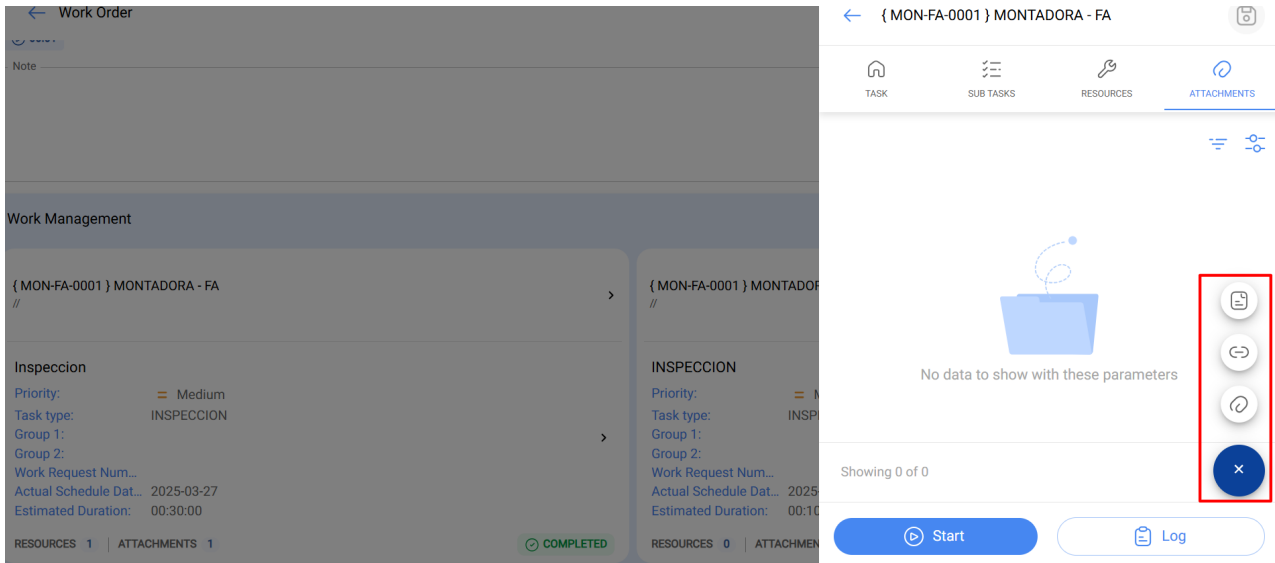
Start Log



Regarding the "Attachments" tab, its functionality is analogous. To view attachments associated with the task plan, simply navigate to this tab.



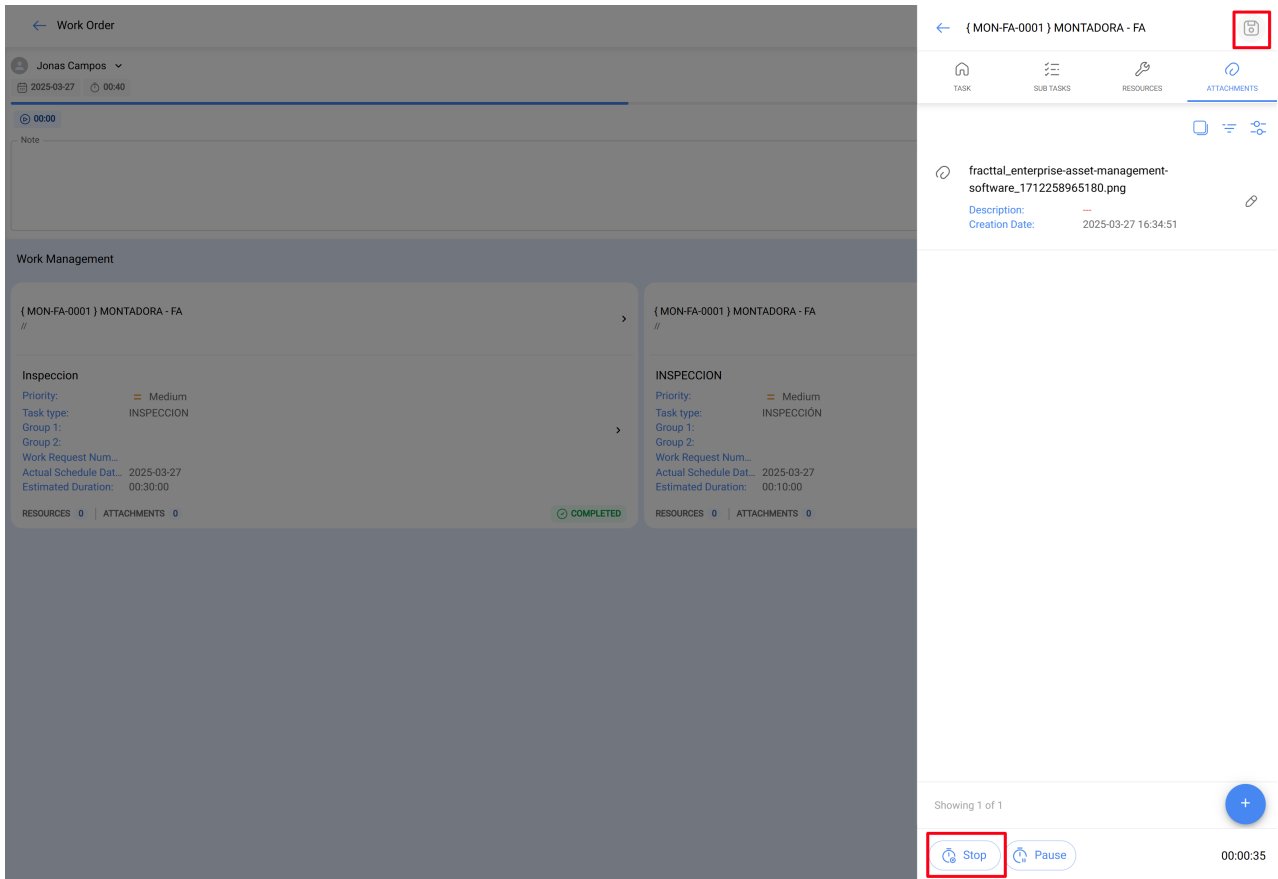
However, to add a new attachment, click on the "Add" link located at the bottom of the window. Then, select the type of attachment you wish to add.



Attachment Types:

- **Note:** A text field where any notes related to the task can be added.
- **Link:** A text field where a hyperlink can be added.
- **File:** A field where files such as documents, images, etc., can be attached.

Finally, once the edits have been made and the information has been completed in each of the 4 tabs of the Work Order (Task, Subtasks, Resources, Attachments), simply click on the save option and then on the stop option to record the end of the task.



Complete a Work Order in Calendar View:

Upon entering the Calendar View tab, simply click on the respective Work Order (WO), and it redirects you to the work order. Follow the same steps outlined at the beginning of this article.

Work Management
View Calendar

Pending Tasks Work Orders

Thursday, 27 March 2025

- 11:00 OT2422-IMP 100%
- 08:50 OT-40-GR 100%
- 08:58 OT-41-GR 0%
- 12.43 Checagem de nivel
- 15:50 OT-46-GR 50%
- 15:50 OT-45-GR 0%
- 16:00 OT-42-GR 100%
- 16:00 OT-43-GR 0%
- 16:48 MANTENIMENTO A SISTEMA ELECTRICO
- 16:51 MANTENIMENTO A SISTEMA HIDRAULICO
- 20:30 OT2436-IMP 0%

What types of files can I upload to Fractal One?