Virtual Planner

The **Virtual Planner** automates preventive maintenance planning, ensuring that tasks are carried out promptly according to the established schedule. This improves operational continuity and reduces unplanned downtime.
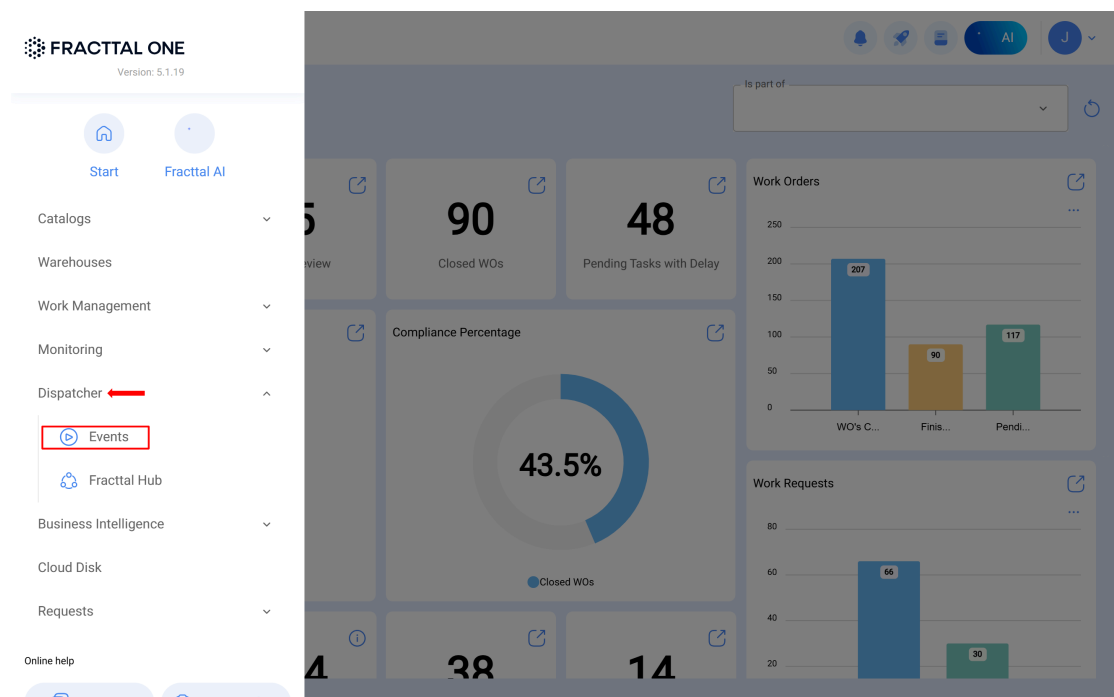
The add-on allows you to create two additional rules in the **Automator** module:

1. **Automatically generate Work Orders** from new work requests.

2. **Automatically generate Work Orders** from pending tasks.
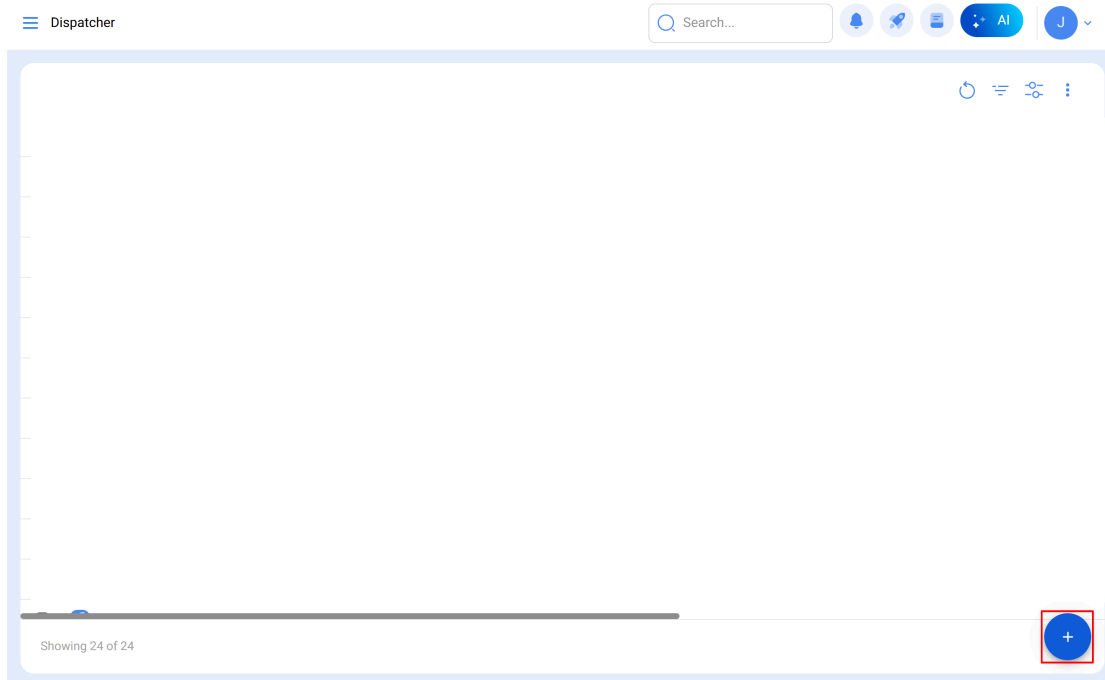
Generate Work Orders from New Work Requests

To generate unplanned work orders coming from a request, you need to follow these steps.

In the main menu, go to the "Automator" module and then to "Events".

Click the plus symbol located at the bottom right to create a new rule.

Here you will find the first of three tabs that **you can** configure for the rule. Once inside, select the "Module," "Submodule," and "Event" you will use for your rule.

Module Requests
Submodule: My Requests
Event: New Request

In Description, add the name of the rule to facilitate its identification in the main list of created rules. Then, click save using the icon located at the top right and go back using the icon located at the top left.

Now, go to the second tab and click on the "Conditions" tab.

In this section, you can set specific conditions using the plus symbol located at the bottom right. These conditions must be met for the rule to activate. If you do not define any conditions, the rule will activate every time a new request arrives, regardless of the asset, location, or any other particular characteristic.

Click the plus symbol and you will see the different conditions you can configure for the rule activation.

Work Request - 1125

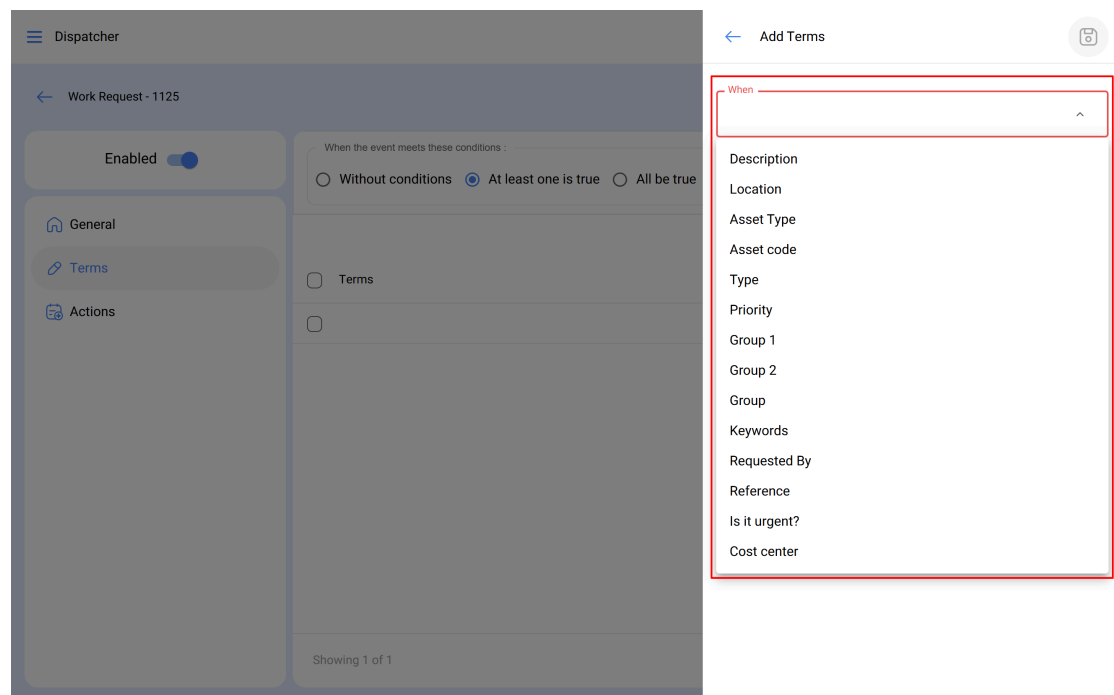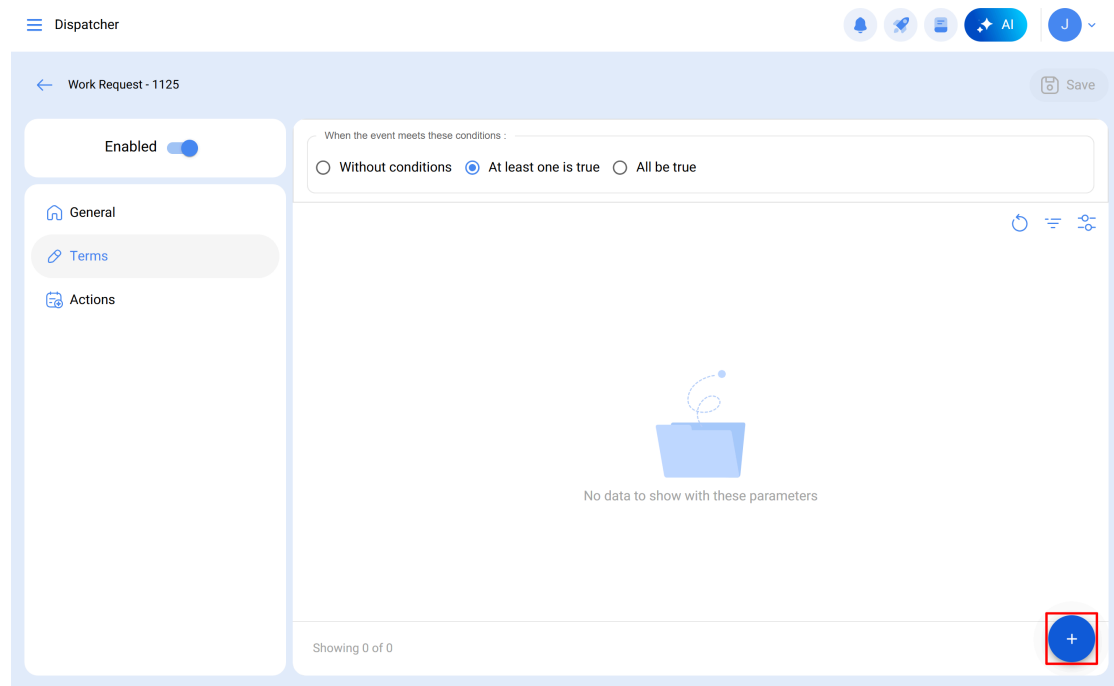Save

Enabled

General

Terms

Actions

When the event meets these conditions :

○ Without conditions   ● At least one is true   ○ All be true

No data to show with these parameters

Showing 0 of 0

+

Dispatcher

Work Request - 1125

Enabled

General

Terms

Actions

When the event meets these conditions :

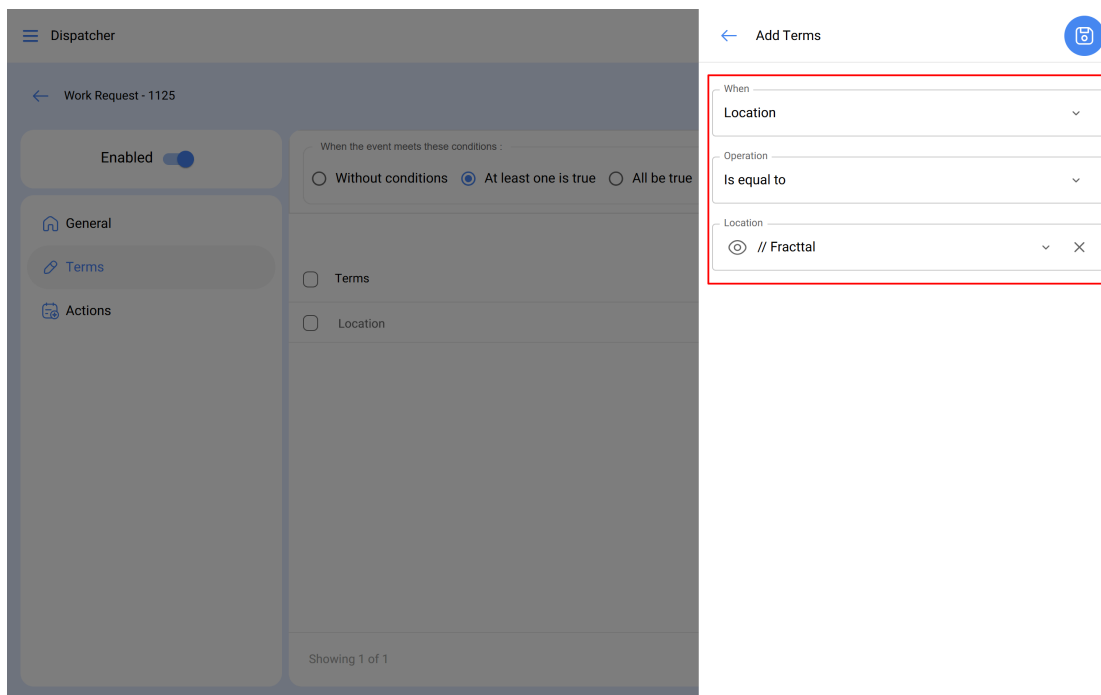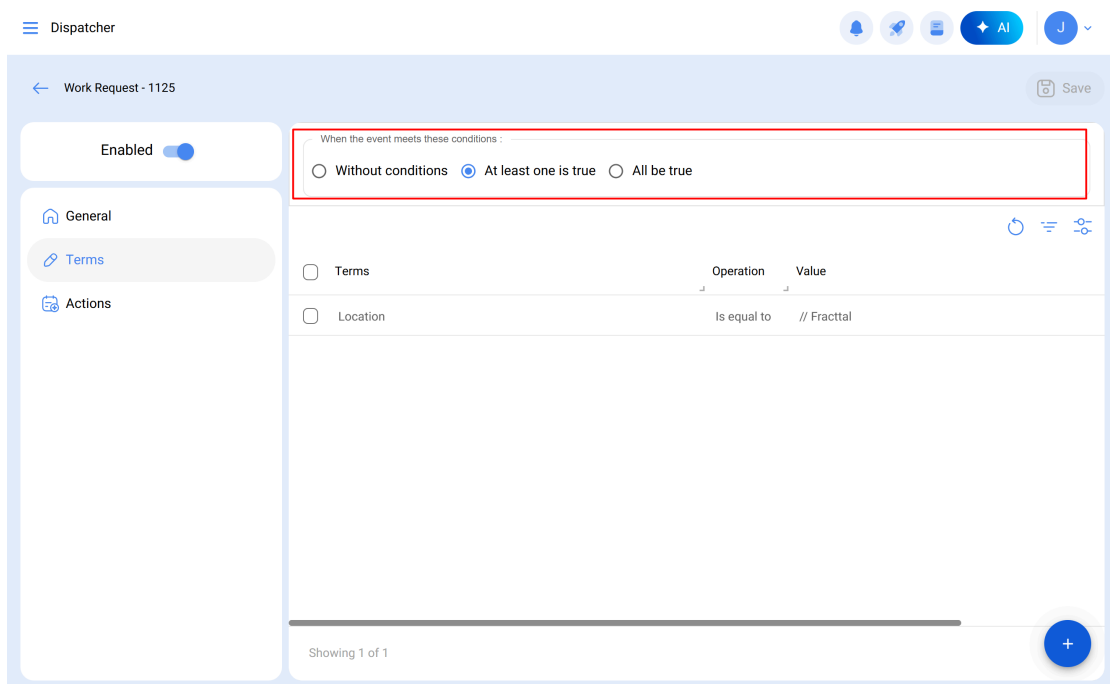○ Without conditions   ● At least one is true   ○ All be true

☐ Terms

☐

Showing 1 of 1

Add Terms

When

Description
Location
Asset Type
Asset code
Type
Priority
Group 1
Group 2
Group
Keywords
Requested By
Reference
Is it urgent?
Cost center

For example, **you can set** that the location of the new request comes from a specific branch, area, or subarea, or that the equipment type is determined.
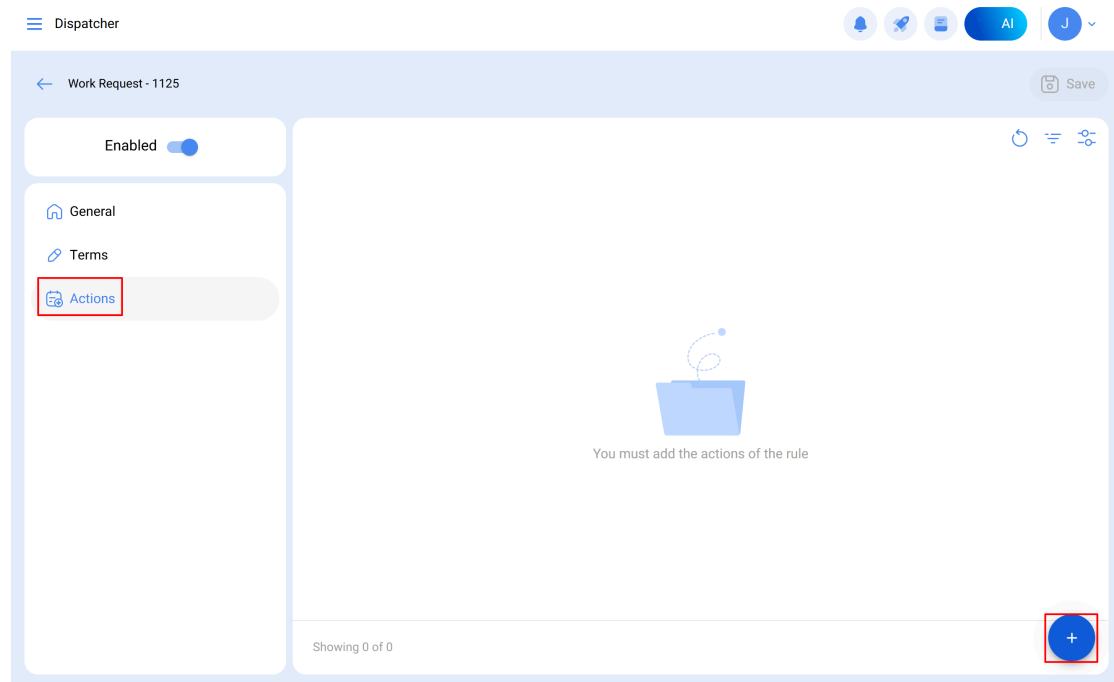
At the top of the conditions, you will see three options, which **work** as follows:
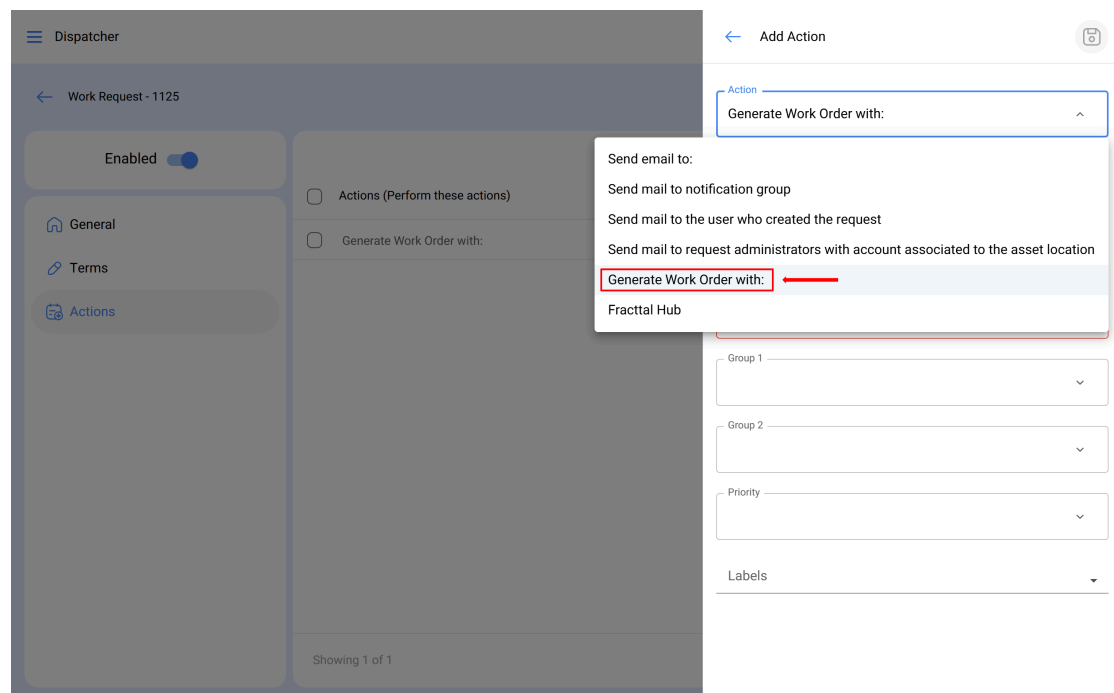

- **No conditions**: No condition applies for the rule activation.

- **At least one is true**: The new request must meet at least one of the conditions to activate the rule.

- **All are true**: The new request must meet all the specified conditions. For example, according to the exercise shown in the image, the asset must be of the type "Air Conditioners" and belong to the specified location "Branch 2"; otherwise, the rule will not activate.
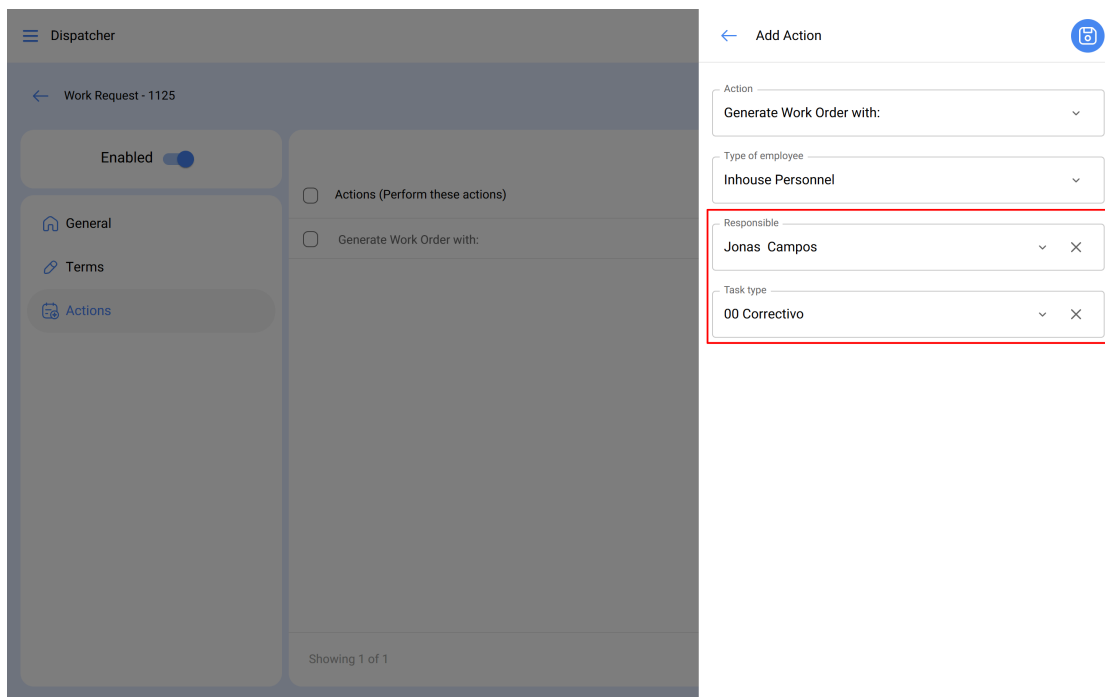
Once the condition is configured, click save and go back. Next, select the last tab called "Actions" and then click the plus symbol.

Here you will see five actions to choose from, select the one that says "Generate Work Order with:"

Indicate who will be Responsible and the type of Task the Work Order generated by the rule will have.
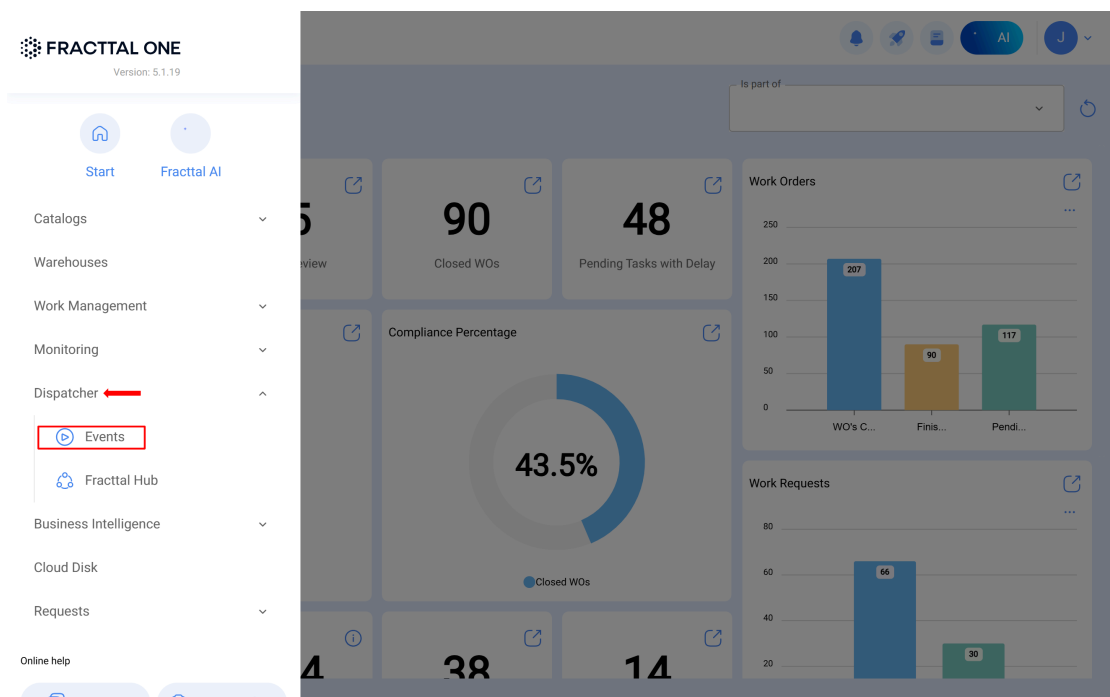
With the action ready, just save and return to the main list. Done! You will now have the rule to automatically generate Work Orders coming from a new request.
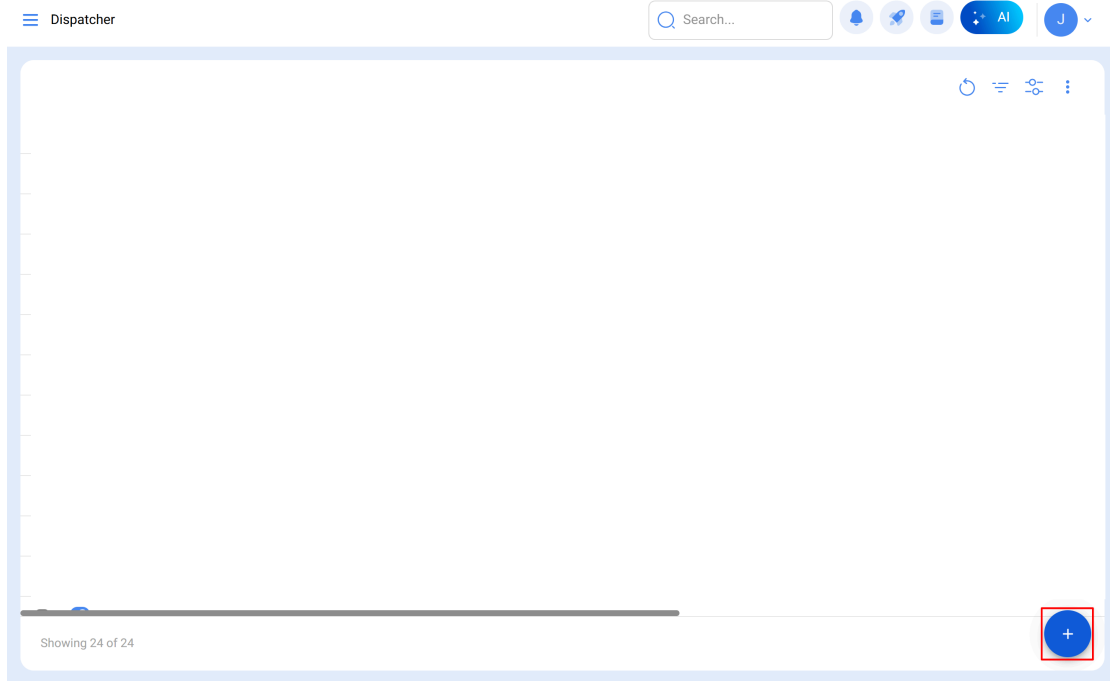
Generate a Work Order from a Pending Task

To generate work orders derived from a planned task, you should do the following:

Within the main menu, go to the "Automator" module and then to "Events".

Click the plus symbol located at the bottom right to create a new rule.
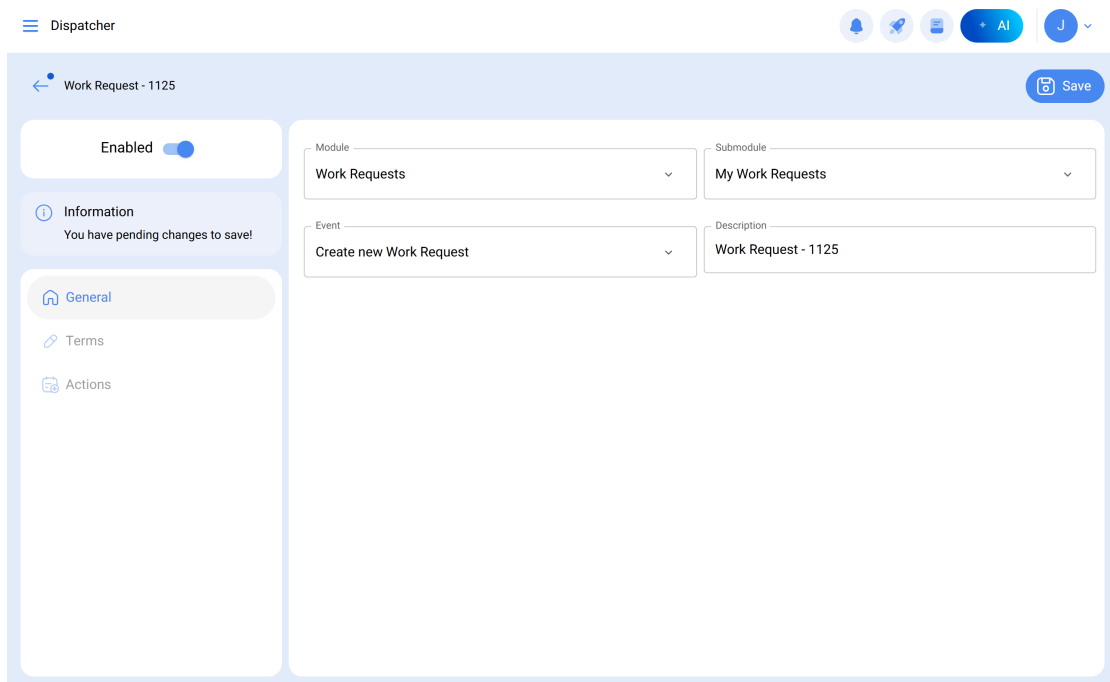
Search...

AI

J

Showing 24 of 24

You will be redirected to the first of the three available tabs to configure the rule.

You will be redirected to the first of the three available tabs to configure the rule. In this section, select the "Module," "Submodule," and "Event" you will use for your rule:

Module: Tasks
Submodule: Pending Tasks
Event: Pending or Overdue Tasks

Dispatcher

AI

J

← Work Request - 1125

Save

Enabled

Module		Submodule	
Work Requests	⌄	My Work Requests	⌄

Information
You have pending changes to save!

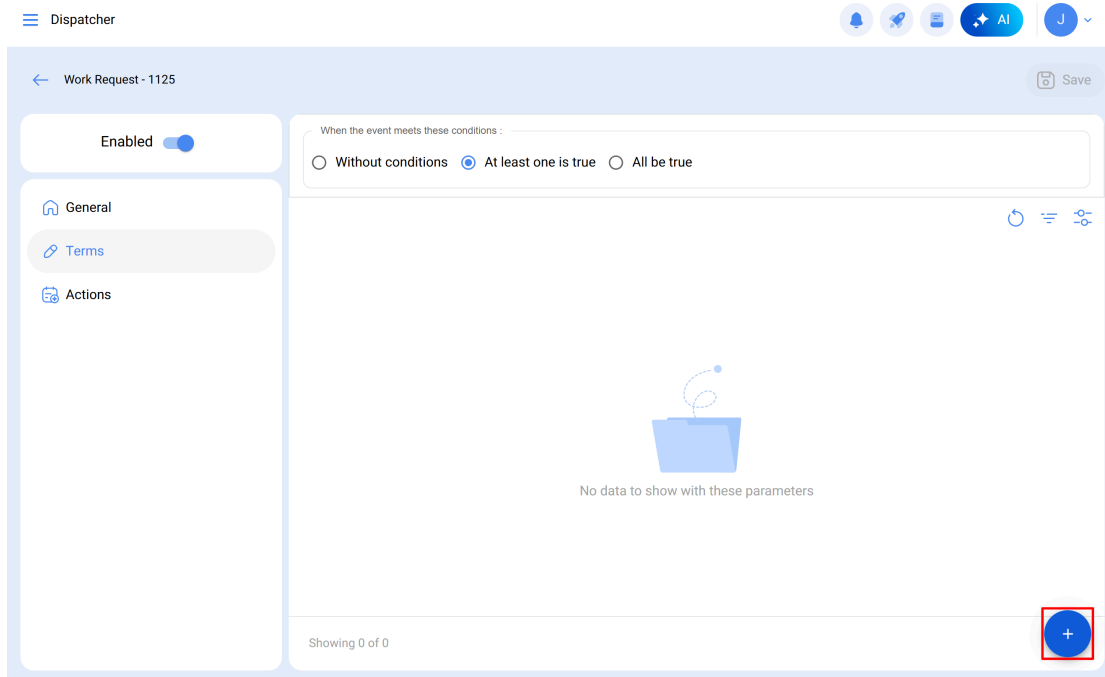| Event		Description	
Create new Work Request	⌄	Work Request - 1125	

⌂ General

✎ Terms

Actions

In **Description**, add the name of the rule to identify it in the main list of created rules. Click save with the icon that appears at the top right and go back using the icon on the left.
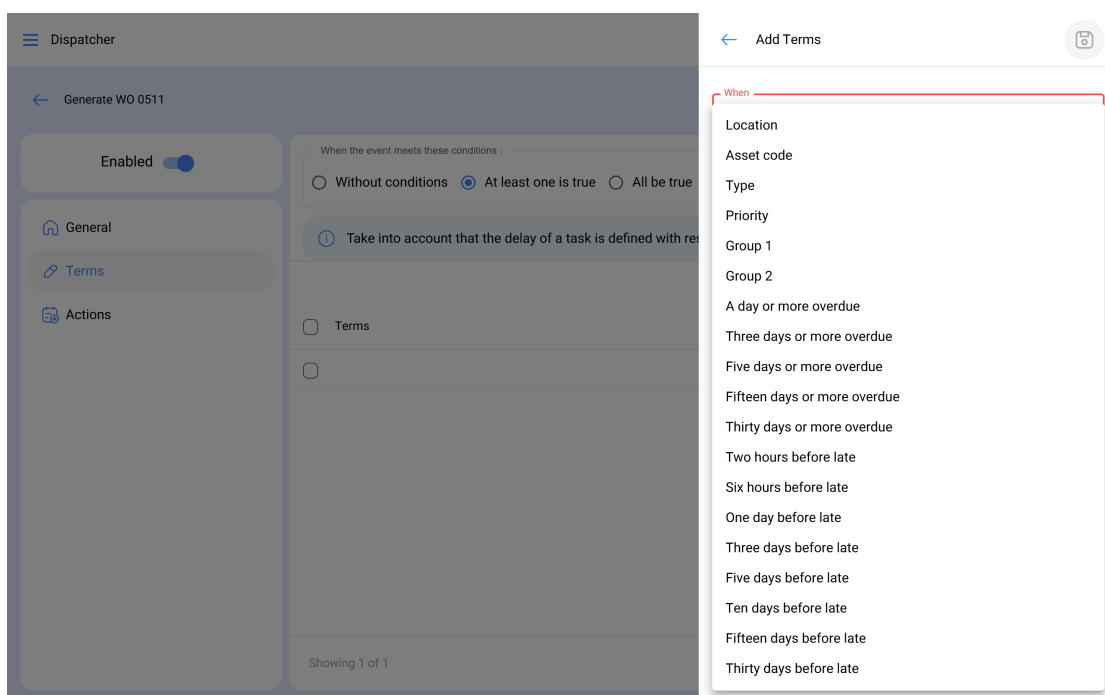

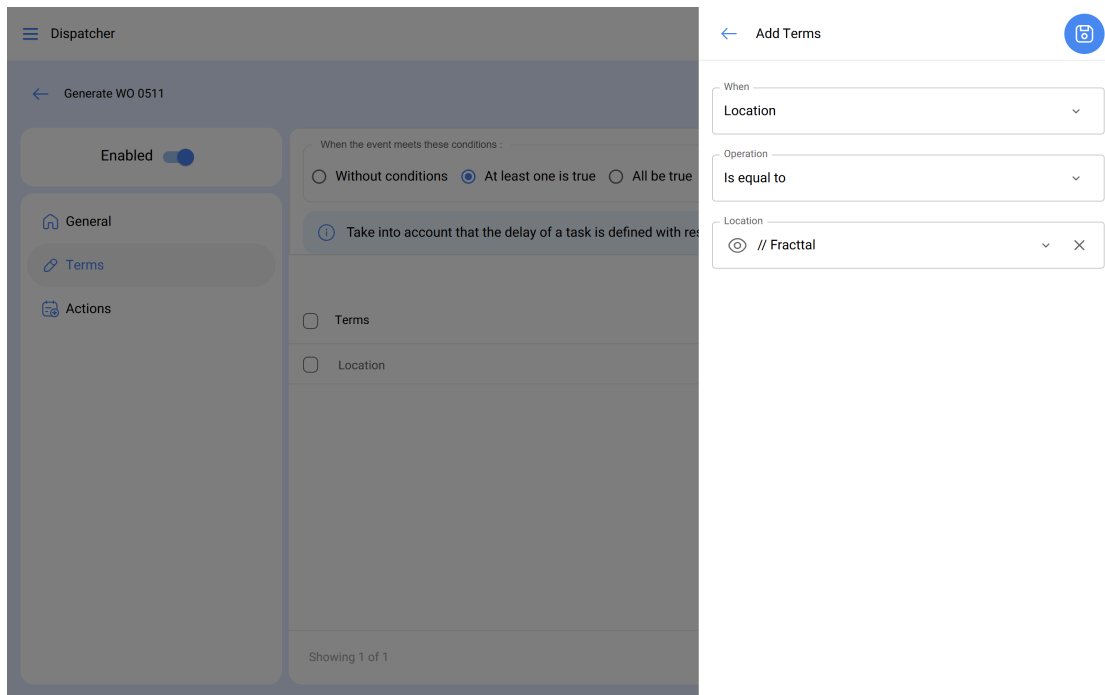Now, you will see the three configurable tabs for the rule. Select the "Conditions" tab

In this section, you can create specific conditions using the plus symbol located at the bottom right. These conditions must be met for the rule to activate. If you do not set any conditions, the rule will activate every time a new "Pending Task" is generated, regardless of the asset, location, or any other specific condition.

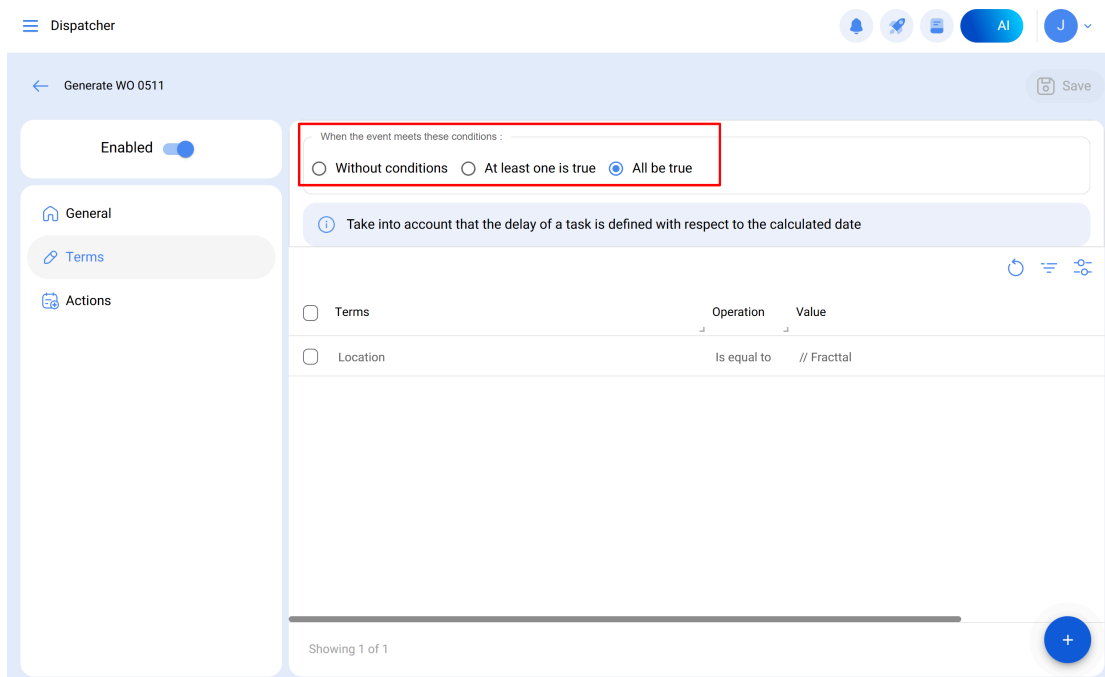In the next image, we can see the different conditions that can be configured for the rule activation.

For example, you can select that the equipment Location is from a specific Branch, area, or subarea, or that the equipment type is determined, or even that the pending task has a certain number of days overdue.
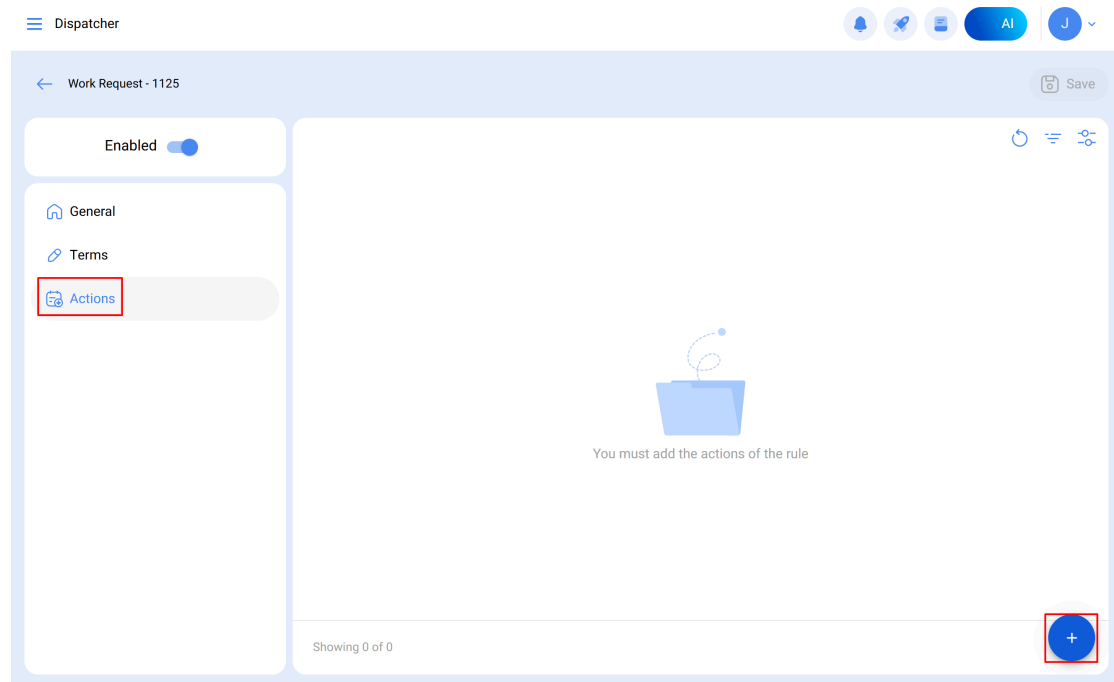
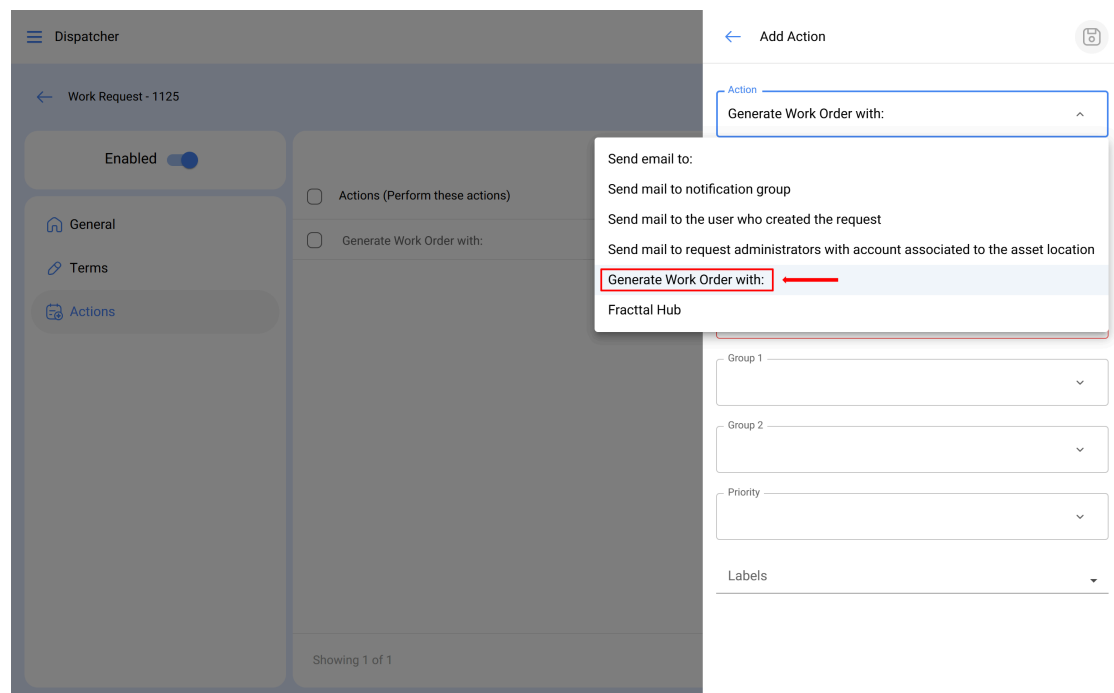At the top of the conditions, you will see three options, which work as follows:

- No conditions: No condition applies for the rule activation.

- At least one is true: The pending task must have at least one of the conditions to activate the rule.

- **All are true**: The pending task must meet all the specified conditions. For example, in our exercise, the asset must be of the type "Air Conditioners," belong to the location "Branch 2," and have "Three days or more overdue." Otherwise, the rule will not activate on that event.

Once the condition is configured, click save and go back. Then, select the last tab "Actions" and click the plus symbol.

Here you will see three actions to choose from, select the one that says "Generate Work Order with:"

Set the following mandatory data for the Work Order generated by the rule: the responsible person, the inventory resource source, the human resources source, and the services resource source. These data can be modified in the Work Order if necessary, or this step will be skipped if they do not apply when assigning the Work Order.

With the action ready, just save and return to the main list. Done! You will now have the rule to automatically generate Work Orders coming from pending tasks.

Notes:

1. All Work Orders generated through the Virtual Planner will be recorded with the name of the person who established the rule, which will appear in the "Created by" field. In other words, the creator of the Work Order will always be the user who defined the rule in the Virtual Planner.

2. If another user modifies the Virtual Planner rule to generate Work Orders, that user will be recorded as the creator of the Work Order in the corresponding field.

3. If the user who created the Virtual Planner rule is deleted, the responsible person for the Work Order will be the one listed as the creator of the Work Order.

4. In the cases mentioned above, the record of the Work Order creator is independent of the permission group associated with the user recorded as the creator. For example, a person who does not have permissions to create Work Orders from the tasks module can be listed as the creator of a Work Order, as long as the above conditions are met.