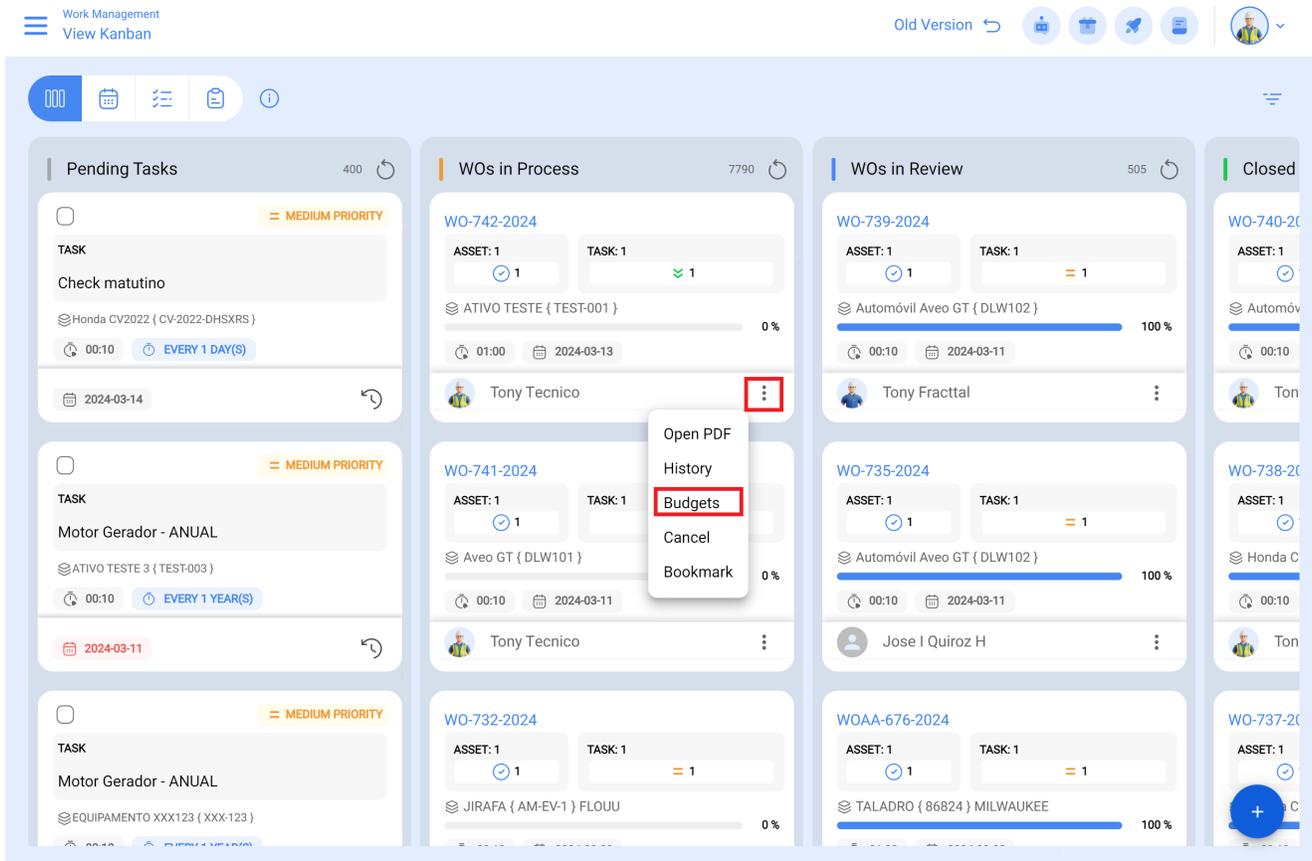


How to add and complete a WO subject to budget approval?

help2.fracttal.com/hc/en-us/articles/25021172151053-How-to-add-and-complete-a-WO-subject-to-budget-approval

A TO subject to budget approval cannot be edited until a budget has been added and approved. To add a budget to a TO, click on the budget symbol that appears on the TO (only appears on TOs that have been created with this option).



Then, by clicking on it, a new window will appear where the different budgets associated to the TO execution must be added.

Tareas Kanban

Tareas Pendientes 436

OTs en Proceso 7790

Plan de mantenimiento mensual

PLANTA ELECTRICA DE 45 KVA (20164 - 0) EXPERT DIESEL

01:00 CADA 1 MESES

2024-04-29

priority: ALTA

maintenance once a month

TRUCK (PILJ89)

00:10 CADA 1 MESES

2024-04-08

priority: MEDIA

MAINTENANCE EVERY 250 KILOMETERS (COPY)

TRUCK (PILJ89)

priority: MEDIA

WO-710-2024

ACTIVO: 1 TAREA: 1

1 = 1

01:00 2024-03-11

0%

Tony Fractal

WO-709-2024

ACTIVO: 1 TAREA: 1

1 = 1

00:10 2024-03-10

0%

Tony Fractal

WO-708-2024

ACTIVO: 1 TAREA: 1

1 = 1

00:10

0%

PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN

Presupuesto: WO-710-2024



Sin datos para mostrar con estos parámetros



Mostrando 0 de 0

Work Management View Kanban

Pending Tasks 400

WOs in Process 7790

Check matutino

Honda CV2022 (CV-2022-DHSXRS)

00:10 EVERY 1 DAY(S)

2024-03-14

priority: MEDIA

Motor Gerador - ANUAL

ATIVO TESTE 3 (TEST-003)

00:10 EVERY 1 YEAR(S)

2024-03-11

priority: MEDIA

Motor Gerador - ANUAL

EQUIPAMENTO XXX123 (XXX-123)

priority: MEDIA

WO-742-2024

ASSET: 1 TASK: 1

1 1

01:00 2024-03-13

0%

Tony Tecnico

WO-741-2024

ASSET: 1 TASK: 1

1 = 1

00:10 2024-03-11

0%

Tony Tecnico

WO-732-2024

ASSET: 1 TASK: 1

1 = 1

00:10

0%

JIRAFA { AM-EV-1 } FLOUJ

Budget description

Work Order

WO-742-2024

Asset

Supplier

Reference

Cost center

Terms

Currency

Colombian Peso

Exchange rate

\$ COP 1

Priority

Medium

The screenshot displays a 'Work Management' interface with a Kanban view. The main area is divided into 'Pending Tasks' (400) and 'WOs in Process' (7790). The 'Pending Tasks' column shows three tasks, all marked as 'MEDIUM PRIORITY'. The 'WOs in Process' column shows three work orders: WO-742-2024, WO-741-2024, and WO-732-2024. Each work order card includes details for 'ASSET: 1' and 'TASK: 1', a progress bar, and a date. A user profile for 'Tony Tecnico' is visible at the bottom of each work order card.

On the right side, a 'Budget description' panel is highlighted with a red border. It contains the following fields:

- Work Order: WO-742-2024
- Asset: ATIVO TESTE { TEST-001 }
- Supplier: GDO
- Reference: Budget test
- Cost center: 0004
- Terms: Credit
- Currency: US Dollar
- Exchange rate: \$ COP 4.550
- Priority: Medium

Finally, once the budgets have been added, all that is required is approval, which can be done directly from the TOs or Budgets module.

From OTs

Work Management
View Kanban

000 [Calendar] [List] [Checklist] [Info]

Pending Tasks 400

- TASK** MEDIUM PRIORITY
Check matutino
Honda CV2022 (CV-2022-DHSXRS)
00:10 EVERY 1 DAY(S)
2024-03-14
- TASK** MEDIUM PRIORITY
Motor Gerador - ANUAL
ATIVO TESTE 3 (TEST-003)
00:10 EVERY 1 YEAR(S)
2024-03-11
- TASK** MEDIUM PRIORITY
Motor Gerador - ANUAL
EQUIPAMENTO XXX123 (XXX-123)
00:10 EVERY 1 YEAR(S)

WOs in Process 7790

- WO-742-2024**
ASSET: 1 TASK: 1
1 1
ATIVO TESTE (TEST-001)
01:00 2024-03-13 0%
Tony Tecnico
- WO-741-2024**
ASSET: 1 TASK: 1
1 = 1
Aveo GT (DLW101)
00:10 2024-03-11 0%
Tony Tecnico
- WO-732-2024**
ASSET: 1 TASK: 1
1 = 1
JIRAFA (AM-EV-1) FLOUU
0%

Budgets: WO-742-2024

WO-742-2024
ATIVO TESTE (TEST-001)

- Approve budget
- Cancel Budgets

Showing 1 of 1

[+]

From Budget

	Work Order	Asset	Third Party	Sequence	Cost center
<input type="checkbox"/>					
<input checked="" type="checkbox"/>	WO-742-2024	ATIVO TESTE { TEST-001 }	GDO	309	0004
<input type="checkbox"/>	WO-732-2024	JIRAFÁ { AM-EV-1 } FLOUU	Antioqueña de Lubricantes. SAS	308	
<input type="checkbox"/>	WO-710-2024	SALON DE REUNIONES ADMINISTRACION { AM-MS...	Antioqueña de Lubricantes. SAS	307	0099
<input type="checkbox"/>	WO-708-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS	306	
<input type="checkbox"/>	WO-707-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS	304	
<input type="checkbox"/>	WO-706-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS	305	
<input type="checkbox"/>	WOAA-597-2024	Camioneta { GEZÇ311 } Chevrolet	MAESTRANZA ZUÑIGA	303	
<input type="checkbox"/>	WOAA-553-2024	Finca La Pesebrera	Antioqueña de Lubricantes. SAS	302	
<input type="checkbox"/>	WOAA-499-2024	Planta hilo	Antioqueña de Lubricantes. SAS	301	
<input type="checkbox"/>	WOAA-499-2024	Planta hilo	Antioqueña de Lubricantes. SAS	300	
<input type="checkbox"/>	WOAA-497-2024	CAMIONETA { pruebaluis } Renault SNS 34945	JANSSEN	297	
<input type="checkbox"/>	WOAA-497-2024	CAMIONETA { pruebaluis } Renault SNS 34945	Antioqueña de Lubricantes. SAS	296	
<input type="checkbox"/>	WOAA-496-2024	Linea preparación { HB M2 LP }	JANSSEN	299	

Showing 50 of 309

Add Budget description

Then, when approving the budget (by any of the options), the user who made the approval will be indicated, together with a comment.

Work Management Budgets

Search... Old Version

Work Order	Asset	Third Party	Sequence	Cost center
WO-742-2024	ATIVO TESTE { TEST-001 }	GDO	309	0004
WO-732-2024	JIRAFA { AM-EV-1 } FLOUU	Antioqueña de Lubricantes. SAS	308	
WO-710-2024	SALON DE REUNIONES ADMINISTRACION { AM-MS...	Antioqueña de Lubricantes. SAS	307	0099
WO-708-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS	306	
WO-707-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS	304	
WO-706-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS	305	
WOAA-597-2024	Camioneta { GEZÇ311 } Chevrolet	MAESTRANZA	303	
WOAA-553-2024	Finca La Pesebrera	Antioqueña de Lubricantes. SAS	302	
WOAA-499-2024	Planta hilo	Antioqueña de Lubricantes. SAS	301	
WOAA-499-2024	Planta hilo	Antioqueña de Lubricantes. SAS	300	
WOAA-497-2024	CAMIONETA { pruebaluis } Renault SNS 34945	JANSSEN	297	
WOAA-497-2024	CAMIONETA { pruebaluis } Renault SNS 34945	Antioqueña de Lubricantes. SAS	296	
WOAA-496-2024	Linea preparación { HB M2 LP }	JANSSEN	299	

Showing 50 of 309

Confirm

By confirming the approval of this budget, the tasks associated with this asset in the WO will be enabled to be carried out. This action is irreversible. Do you want to continue?

No Yes

Add Budget description

Finally, the TO will be enabled for editing and execution.

Work Management Budgets

Search...

Work Order	Asset	Third Party
WO-742-2024	ATIVO TESTE { TEST-001 }	GDO
WO-732-2024	JIRAFA { AM-EV-1 } FLOUU	Antioqueña de Lubricantes. SAS
WO-710-2024	SALON DE REUNIONES ADMINISTRACION { AM-MS...	Antioqueña de Lubricantes. SAS
WO-708-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS
WO-707-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS
WO-706-2024	PELETIZADORA 4 { Ejemplo: A8DW@ } FAMSUN	Antioqueña de Lubricantes. SAS
WOAA-597-2024	Camioneta { GEZÇ311 } Chevrolet	MAESTRANZA
WOAA-553-2024	Finca La Pesebrera	Antioqueña de Lubricantes. SAS
WOAA-499-2024	Planta hilo	Antioqueña de Lubricantes. SAS
WOAA-499-2024	Planta hilo	Antioqueña de Lubricantes. SAS
WOAA-497-2024	CAMIONETA { pruebaluis } Renault SNS 34945	JANSSEN
WOAA-497-2024	CAMIONETA { pruebaluis } Renault SNS 34945	Antioqueña de Lubricantes. SAS
WOAA-496-2024	Linea preparación { HB M2 LP }	JANSSEN

Showing 50 of 309

← APPROVE BUDGET

User *

Tony Tecnico

Comments

Ok

Note: When a budget is approved, it will not automatically be reflected in the resources added to the TO.