How to manage and convert a work request into a WO?

Once a request is generated, the system allows you to manage it through an unplanned task; to do this, click on the task planning symbol.
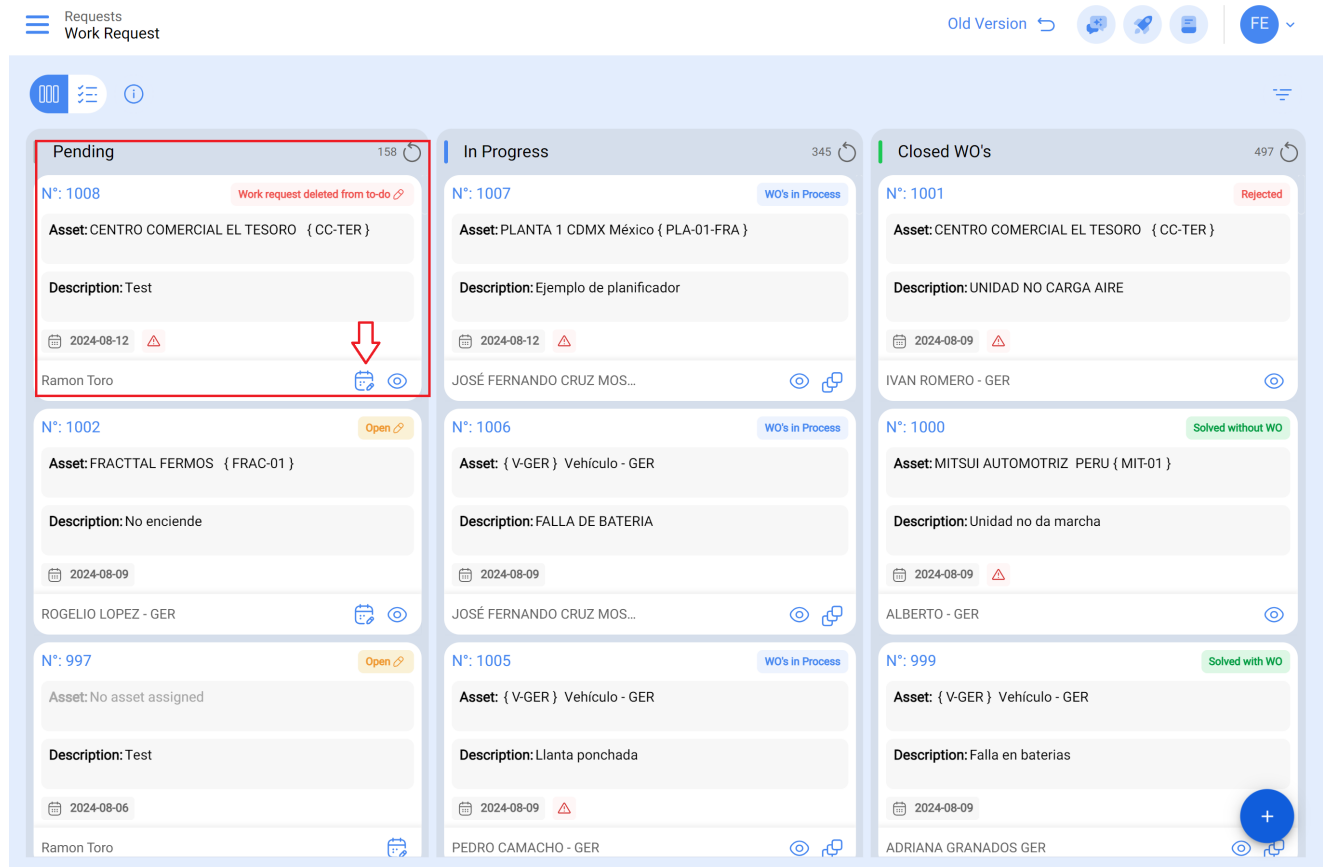
Then when you click on it, a new window will be enabled, where you must complete all the information corresponding to the non scheduled task that can be sent to Work Queues (to be scheduled later) or generated as a new work order.

To do this, they must establish 4 steps before managing the task:

- **Assets:** Information associated with the asset and its status.

- **Task**: Information associated with the non scheduled task.

- **SubTasks:** Listing of the subtasks or check-list (step-by-step) that must be accomplished to successfully complete the task.

- **Resources:** Resources to be used in the execution and fulfillment of the task.

Step 1:

| ① Asset | ② Task | ③ Sub Tasks | ④ Resources |

Asset

👁 CAMIONETA { CAM-REN-01 } Renault SNS 34945

Incident date	Requested By
2024-03-12 14:21	Carlos Ballesteros Soporte Fracttal

☑ Has the asset failed?

Fault Type	Fault Cause	Fault Detection Method
HIDRAULICA ⊗ ⌄	Filtro ⊗ ⌄	1. VISUAL ⊗ ⌄

Fault Severity	Type of damage	It caused disruption of other assets?
Medium ⌄	None ⌄	000:00

☑ Asset out of service

Start date of out of service
2022-08-17 07:00

Next ›

- **The Asset has failed?:** Option where you can indicate if the non scheduled task involves the failure of the asset.

- **Fault Type:** Catalog with the types of faults associated with the assets.

- **Fault Cause:** Catalog with the causes that can lead to asset failures.

- **Fault detection method:** Catalog with the detection methods by which a fault can be identified.

- **Fault Severity:** Listing of fault hierarchy options according to severity.

- **Type of damage:** List with default options to identify the type of damage caused by the asset failure.

- **It caused disruption of other assets:** Time in which the failure directly affects other assets.

- **Assets Out of service:** State in which the equipment is stopped due to a functional failure. This field is extremely important, since when it is activated, the date and time from when the equipment was stopped must be entered (this time is the one taken for one of the availability indicators in the Business Intelligence module).

Step 2:

Task Description: Short detail specifying the task in question.

- **Note:** Free field where you can add some details of the task.

- **Task Type:** Catalog with all the types of tasks registered in the system.

- **Group 1 and 2:** Corresponds to free fields left by the platform to be completed and give an additional classification to the task.

- **Priority:** List where the task is classified according to its priority.

- **Estimated Duration:** Theoretical time duration it would take to perform the task (the actual time is recorded directly in the WO).

- **Request Number:** Identification correlative of the request that generates the unplanned task.

- **This task has already been done:** Option that allows to identify in the system if the task has already been executed or not.

- **Options:** Options available to manage the non scheduled task through a WO (the person responsible for the WO must be added) or Work Queues (the date on which the task will be scheduled must be added).

Step 3:

In this step, you must add the associated subtasks, to do this you have to click on the add symbol that is located in the lower right part of the platform and then add the subtasks as appropriate.

		Order	Description	Type	Group/Part	Re
✎	🗑	1	Procedure	Text		No

ADD SUBTASK

☐ Required   ☐ Attachment Required

Order
2

Type
Text

Group/Part

Description

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Asset — Task — Sub Tasks — Resources

		Order	Description	Type	Group/Part	Required	Attachment Required
✎	🗑	1	EL EQUIPO SE ENCUENTRA OPERATIVO?	Yes/No		Yes	No
✎	🗑	2	REGISTRE EL NUMERO DE ATS ASOCIADO A LA INTERVENCIÓN	Number		Yes	No
✎	🗑	3	VERIFIQUE LAS FALLAS REGISTRAS EN EL DISPLAY DEL VEHICULO	Text		Yes	No
✎	🗑	4	PREGUNTA 5	Yes/No		No	No
✎	🗑	5	OBSERVACIONES	Text		No	No
✎	🗑	6	INDIQUE LA FECHA	Date and time		No	No

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Step 4:

In this last step you can add the resources associated to the non scheduled task, where you can add: Inventories, Human Resources, Services, Inventories (Not Cataloged), Services (Not Cataloged).

Non Scheduled Tasks

Asset ✓ ———— Task ✓ ———— Sub Ta...

		Qty	Unit	Description	Type	U
✏	🗑	01:00	Hour	Electrico especialista	Inhouse Personnel	$
✏	🗑	1	1/4 de Galón	{ A15 } TOTAL OIL 10w-60 / 1/4	Inventory	$

‹ Back   Finish ›

← **EDIT RESOURCE**   💾

Resource Type
Inhouse Personnel ▾

Profile / Resources
Electrico especialista ⊗ ▾

Human Resource
Carlos Pinzon ⊗ ▾

Unit
Hour

☐ Extra hours

Qty
001:00

Unit cost
$ COP 10.000

Total cost
$ COP 10.000,00

Notes

← Non Scheduled Tasks

Asset ✓ ———— Task ✓ ———— Sub Tasks ✓ ———— Resources ✓

		Qty	Unit	Description	Type	Unit cost	Total cost	Resource Source
✏	🗑	01:00	Hour	Electrico especialista	Inhouse Personnel	$ COP 10.000,00	$ COP 10.000,00	Carlos Pinzon
✏	🗑	1	1/4 de Galón	{ A15 } TOTAL OIL 10w-60 / 1/4	Inventory	$ COP 25.878,66	$ COP 25.878,66	Almacen producción 2

‹ Back   **Finish ›**

⊕

Then, at the end of the management of the non-scheduled task, you can see the change in the status of the request and the correlative of the generated WO (if this option was chosen to manage the task).