Virtual planner

The virtual planner add-on allows you to create two additional rules in the "Dispatcher" module:

- Automatically generate a WO through a new work request.

- Automatically generate a WO through pending tasks.

Generate a WO through a new work request

To generate unplanned work orders from a request, do the following:

Go to the main menu at the upper left.
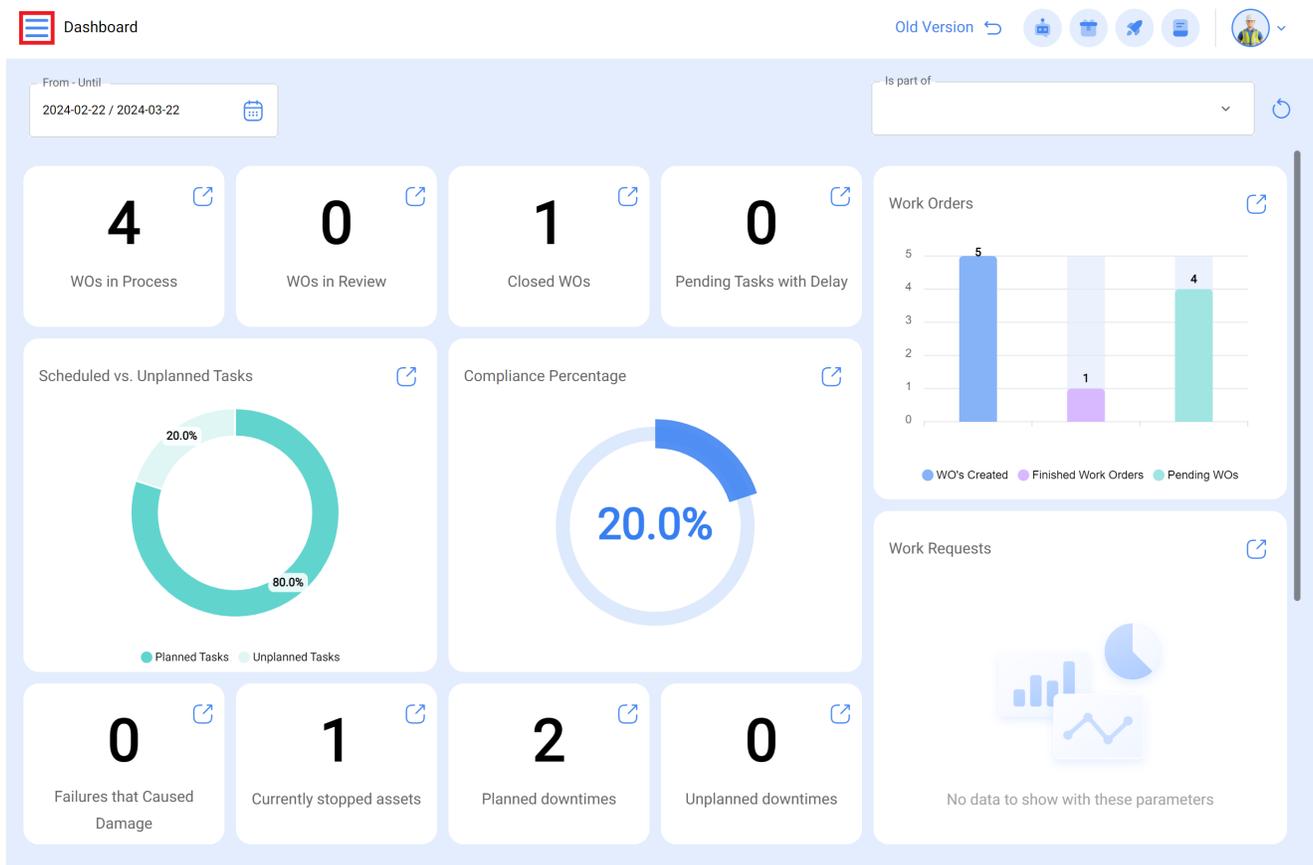
Go to the "Dispatcher" module.
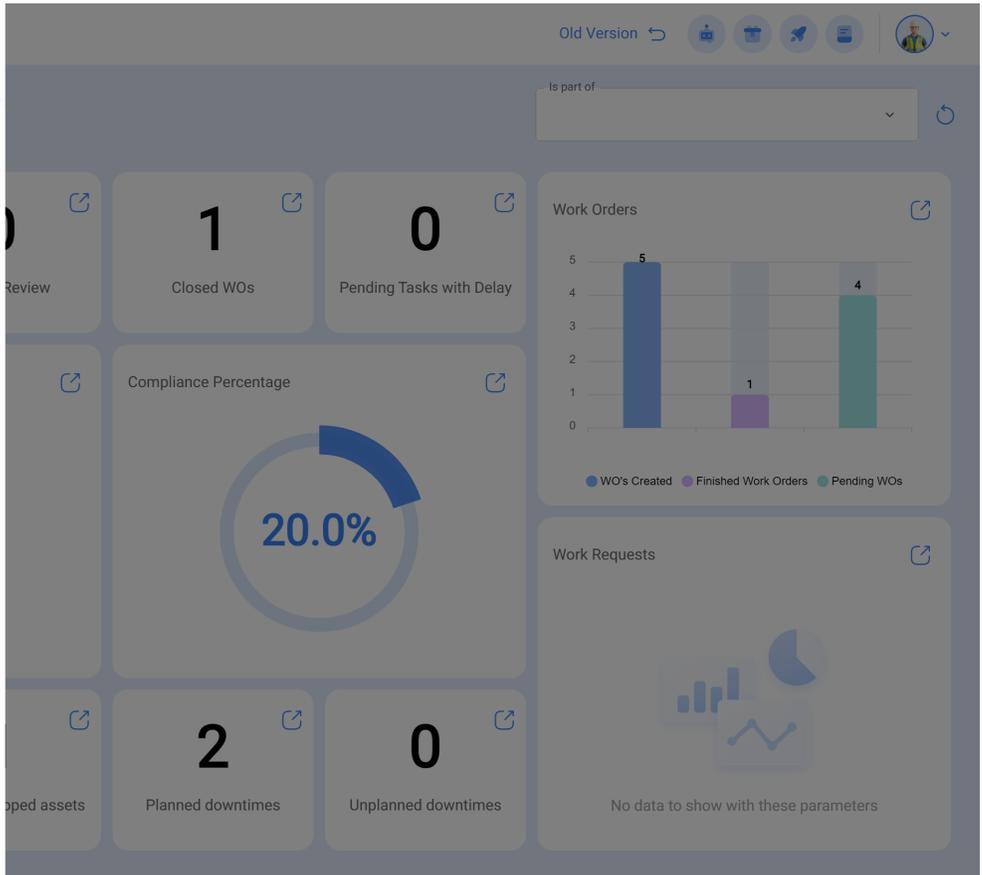
Click on the add symbol at the lower right to create a new rule.

	Description	Module	Submodule	Event
	Geração de OS Dionesio	Work Management	Pending Tasks	Pending tasks or with delay

Showing 1 of 1

Go to the "General" tab and select the "Module," "Submodule" and "Event" that will be used in the rule.

Module: Requests, Submodule: My Requests, Event: New Request

In the "Description" field, fill in the name of the rule to identify it in the main list of created rules. Click on "save" at the upper right and "back" at the upper left of the platform.
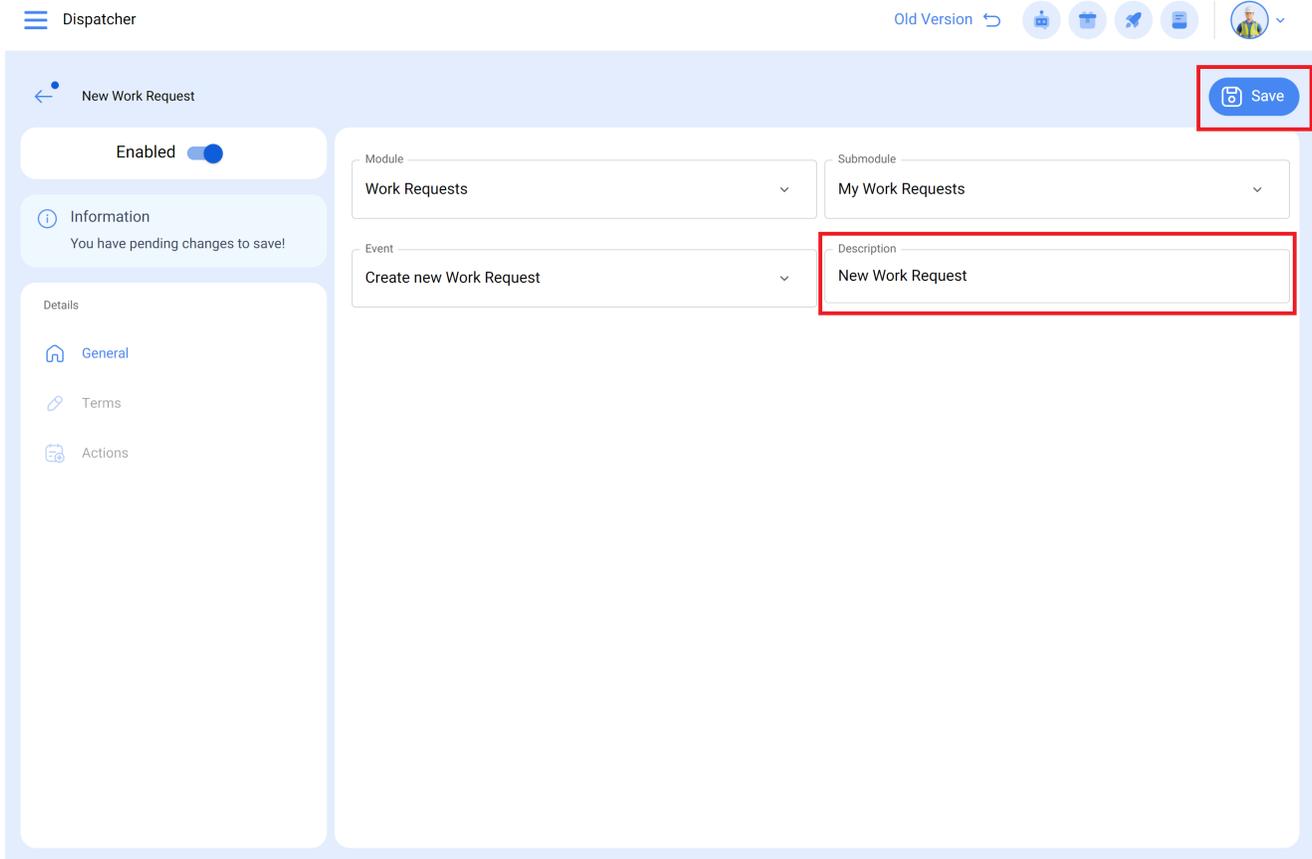
Now go to the "Conditions" tab to configure the rule.

In this tab you can create specific conditions with the add symbol at the lower right. These conditions will have to be met to activate the rule. If no condition is selected, the rule will be activated when any new request arrives, regardless of the asset or the location or any special characteristic.

Click on the add symbol and you will see different conditions you can choose from for activating the rule.

Dispatcher

New Work Request

Old Version ↶

Enabled ⬤

Details

🏠 General

✏️ **Terms**

📋 Actions

Save

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

New Work Request

Enabled ⬤

Details

🏠 General

✏️ Terms

📋 Actions

When the event meets these conditions :

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

☐ **Terms**   Op

☐   Is

Showing 1 of 1

← Add Terms

💾

When

^

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

For example, you can choose for the Localization of a new request to come from a specific branch, area or subarea or choose a specific type of equipment.
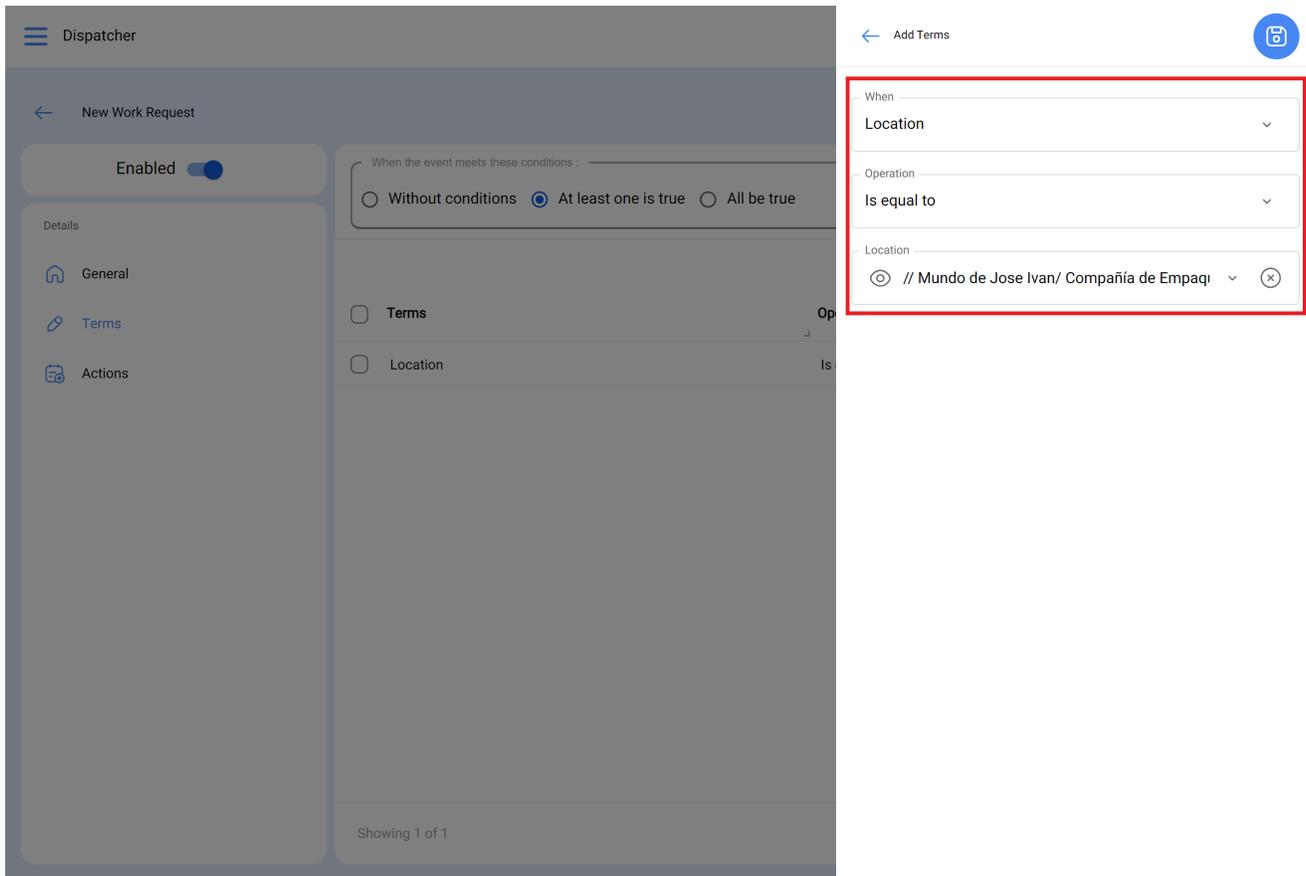
At the top, there are 3 options as follows:

- **Without conditions:** There are no conditions for activating the rule.

- **At least one condition:** The new request should meet one of 2 conditions to activate the rule.

- **All conditions:** The new request should meet all the specified conditions. For example, according to the above screen, the asset has to fall under "Air conditioners" and belong to the specified localization "Branch 2." Otherwise, the rule will not activate in this case.

Once the conditions are configured, click on the "save" and "back" icons. Go to the last tab, "Actions," and then click on the add symbol.
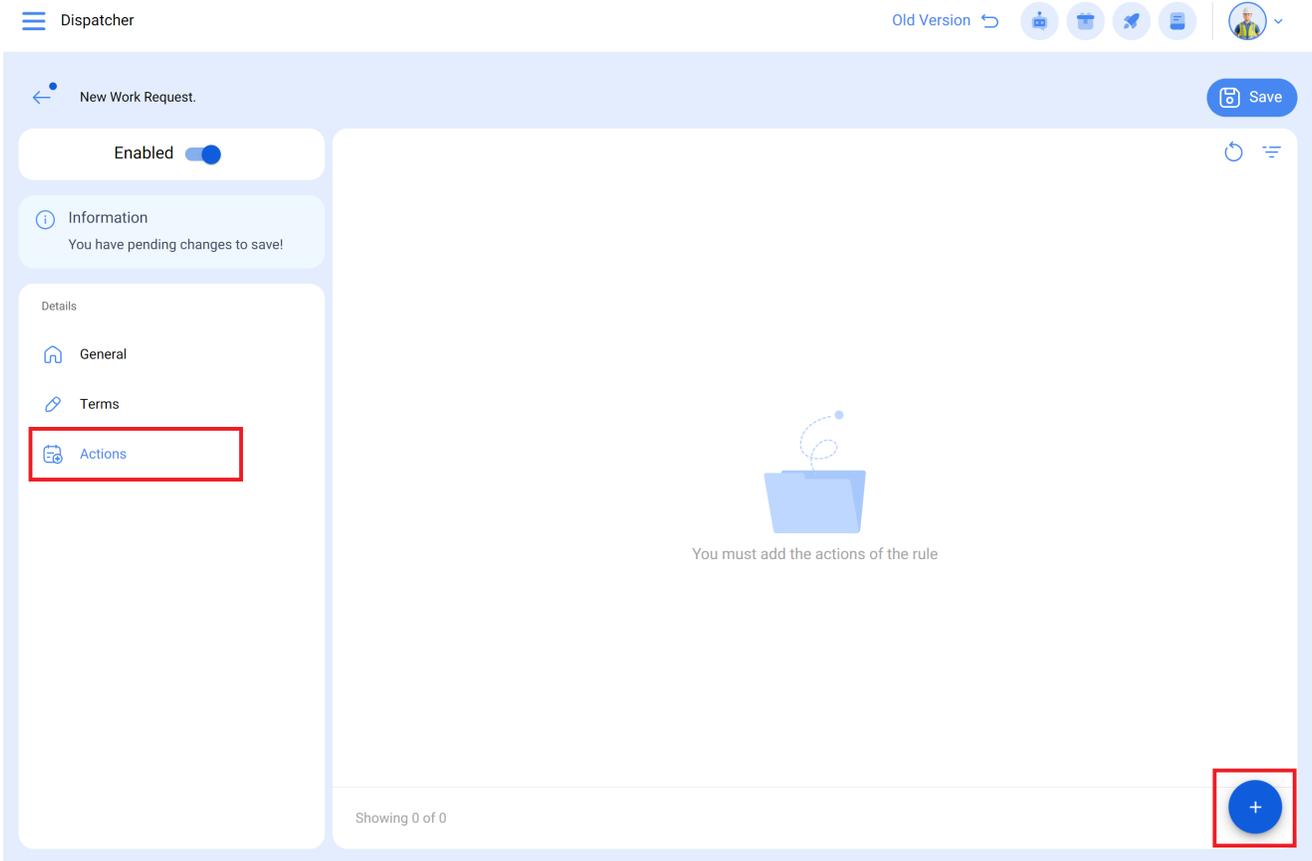
Here there are five actions to choose from. Select "Generate Work Order with:"
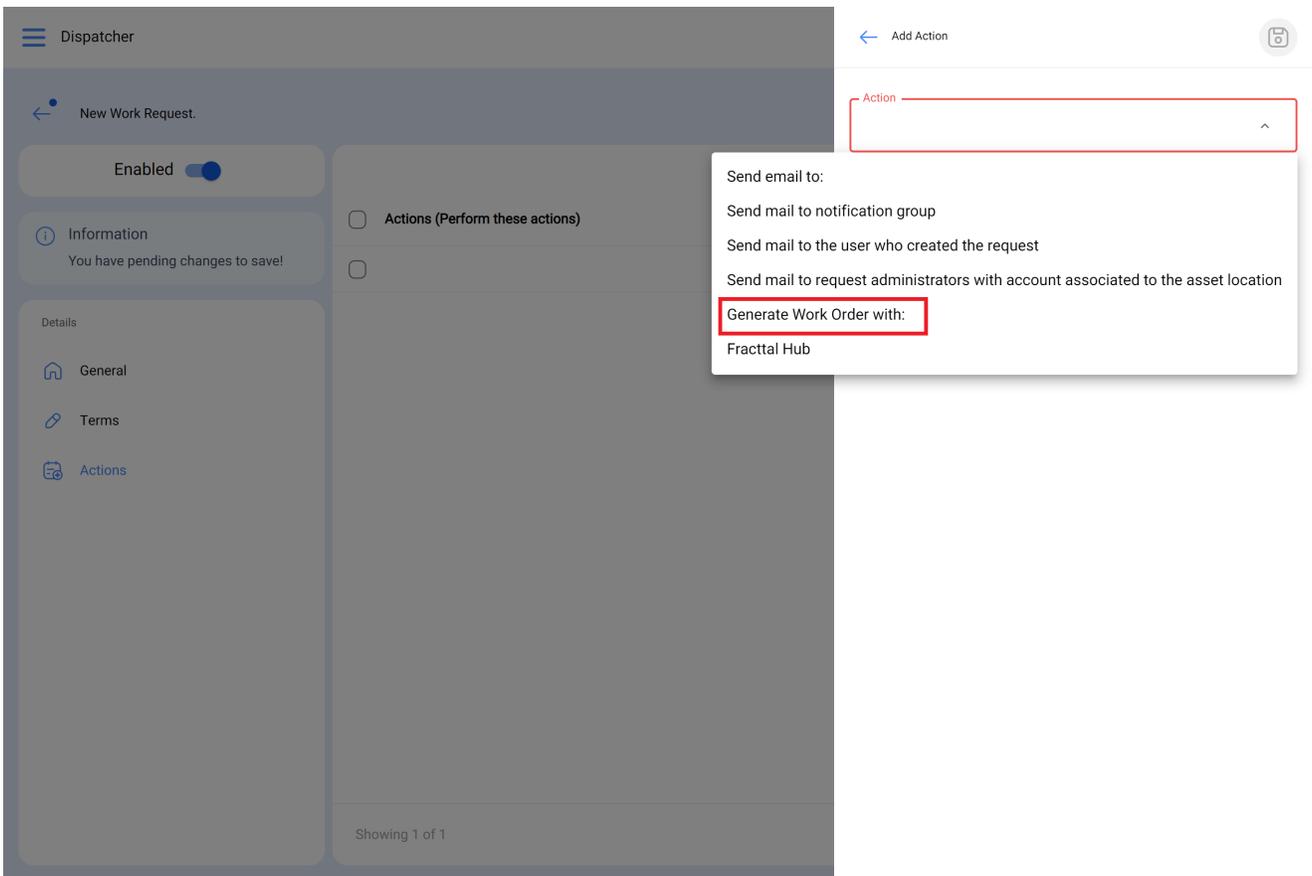
Here you can select the person responsible and the type of task for the WO generated by the rule.

Click on save and return to the main list. You'll see the rule used to automatically generate Work Orders that come from a new request.

Generate WO from a pending task

To generate work orders that come from a planned Task, go to the main menu at the upper left of the screen.

Then go to the Dispatcher module.

Click on the add symbol at the lower right to create a new rule.

This will take you to the first of three tabs that we can configure for the rule.

Old Version ↩

← •

Save

| Enabled | 🔵 |

⚠ Required Information
- Description can't be blank
- Module can't be blank
- Submodule can't be blank
- Event can't be blank

Module

Submodule

Event

Description

Description can't be blank

Details

🏠 General

✏ Terms

🗓 Actions

Select the "Module," "Submodule" and "Event that you will use for the rule:

Module: Tasks, Submodule: Pending Tasks, Event: Tasks pending or with delays

In the "Description" field, fill in the name of the rule to identify it in the main list of created rules. Click on the save icon at the upper right and the back icon at the upper left.
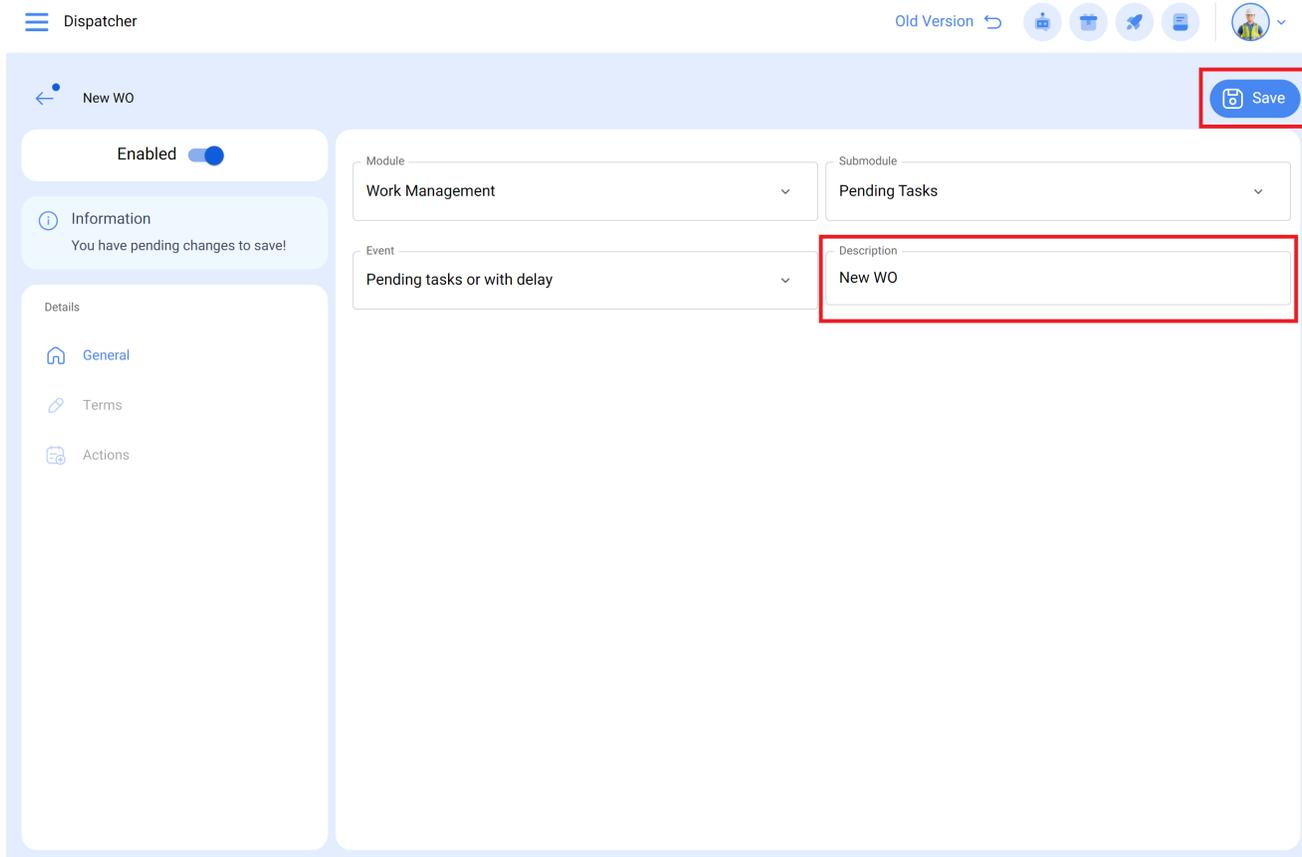
Here you will see 3 tabs that you can configure for the rule. Click on the "Conditions" tab.

With this option, you can create specific conditions with the add symbol at the lower right. These conditions will have to be met in order to activate the rule. If no condition is selected, the rule will be activated for any new "Pending Task" regardless of the action asset, location or other specific characteristic.

In the following image, you can see the different conditions that can be configured to activate the rule.
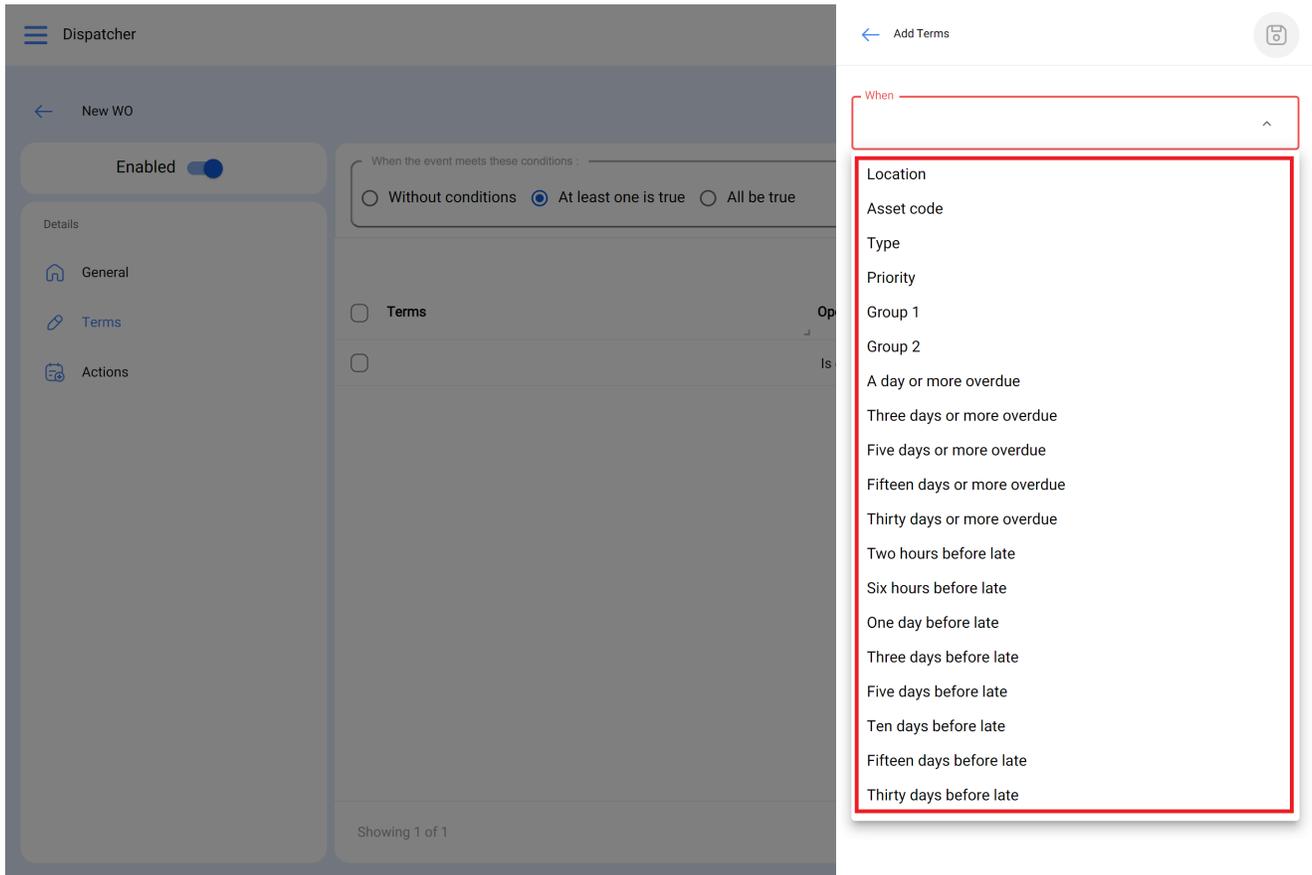
For example, you can choose for the Localization of the equipment to be a specific Branch, area or subarea or choose a specific type of equipment or even for the pending task to be x days delayed.

At the top of the screen are 3 conditions options as follows:
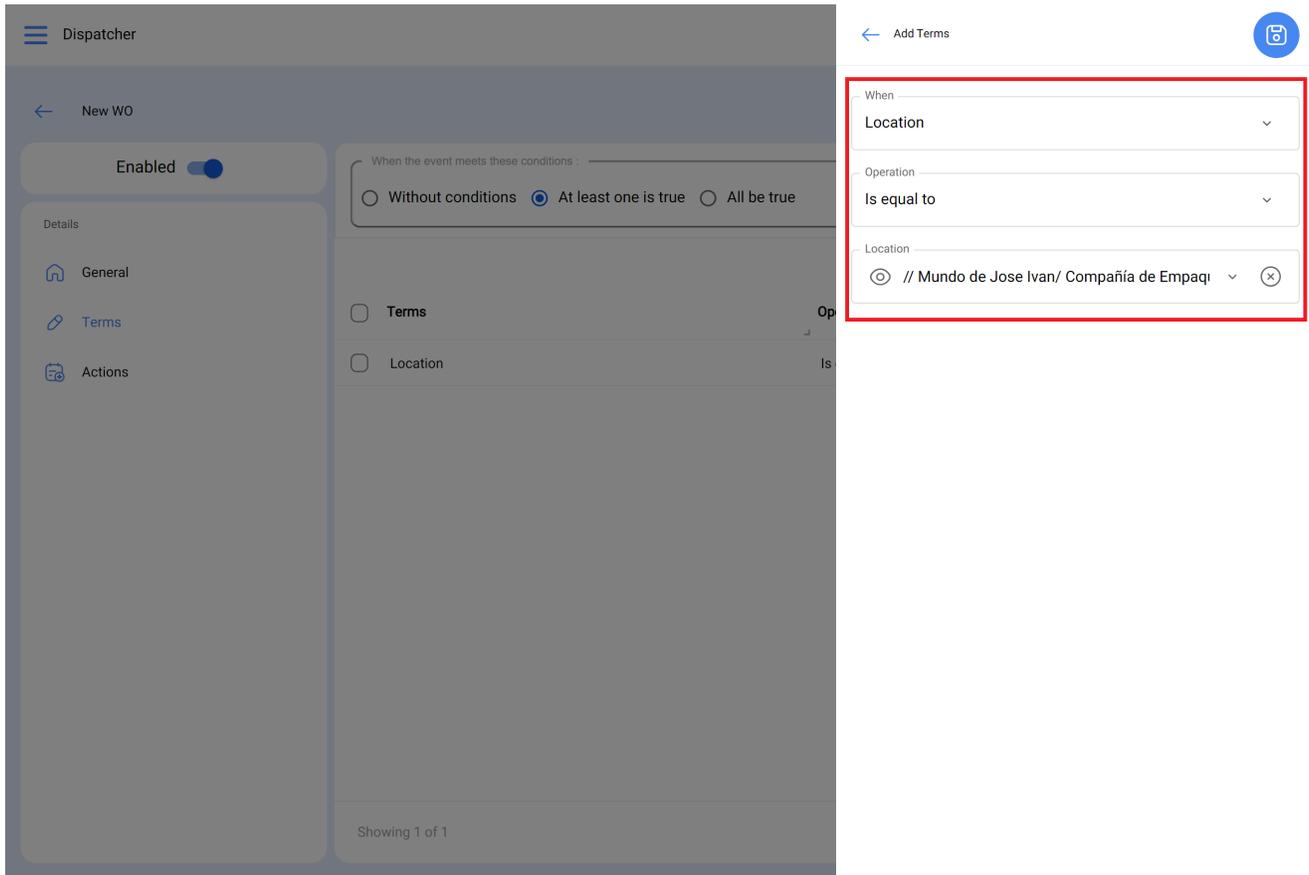
- **Without conditions:** There are no conditions for activating the rule.

- **At least one condition:** The Pending Task should meet one of 2 conditions to activate the rule.

- **All conditions:** The Pending Task should meet all the specified conditions. For example, according to the above image, the asset has to fall under "Air conditioners" and belong to the specified localization "Branch 2" and be "Three or more days delayed." Otherwise, the rule will not activate in this case.

Once the condition is configured, click on the save icon and then the back icon.

Go to the last tab, "Actions," and then click on the add symbol.
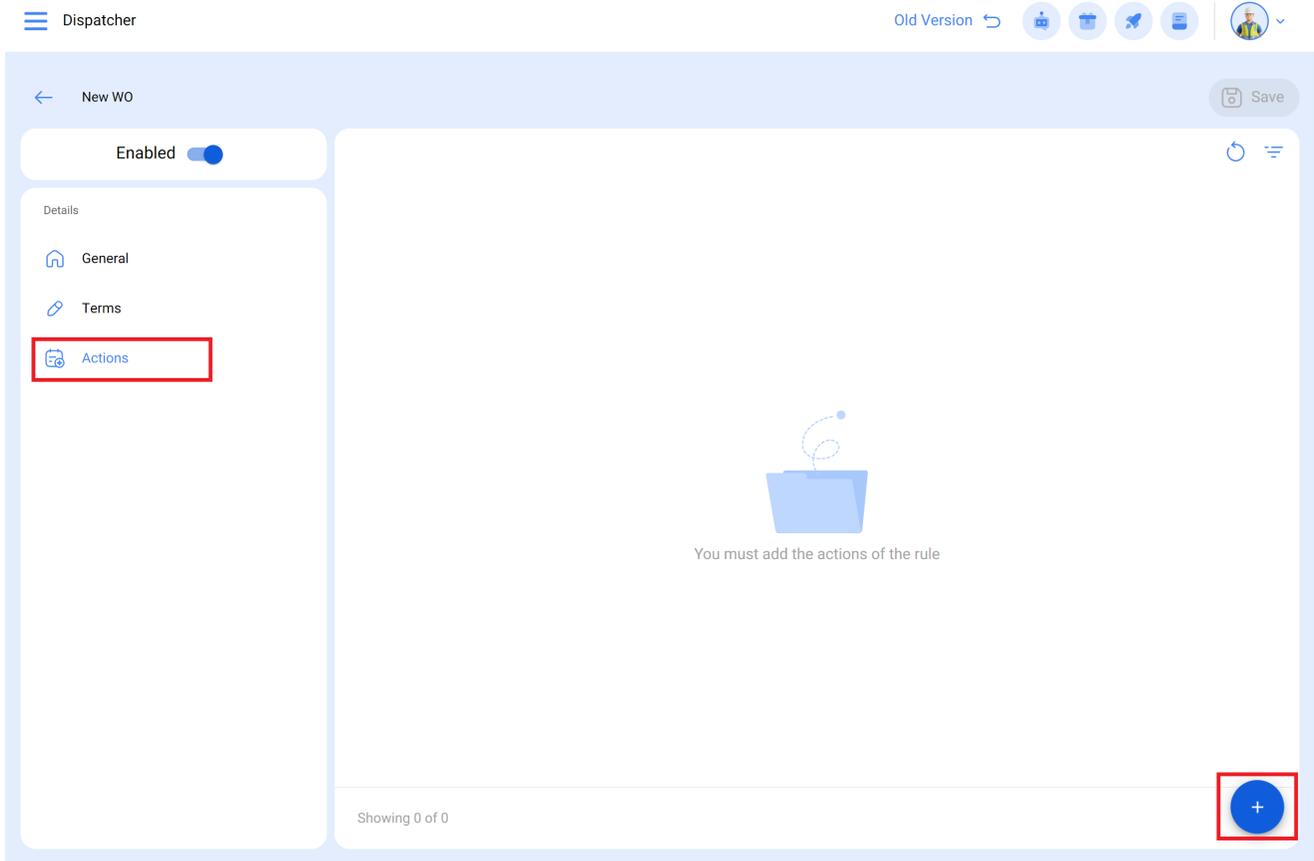
Here there are 3 actions to choose from. Select "Generate Work Order with:"
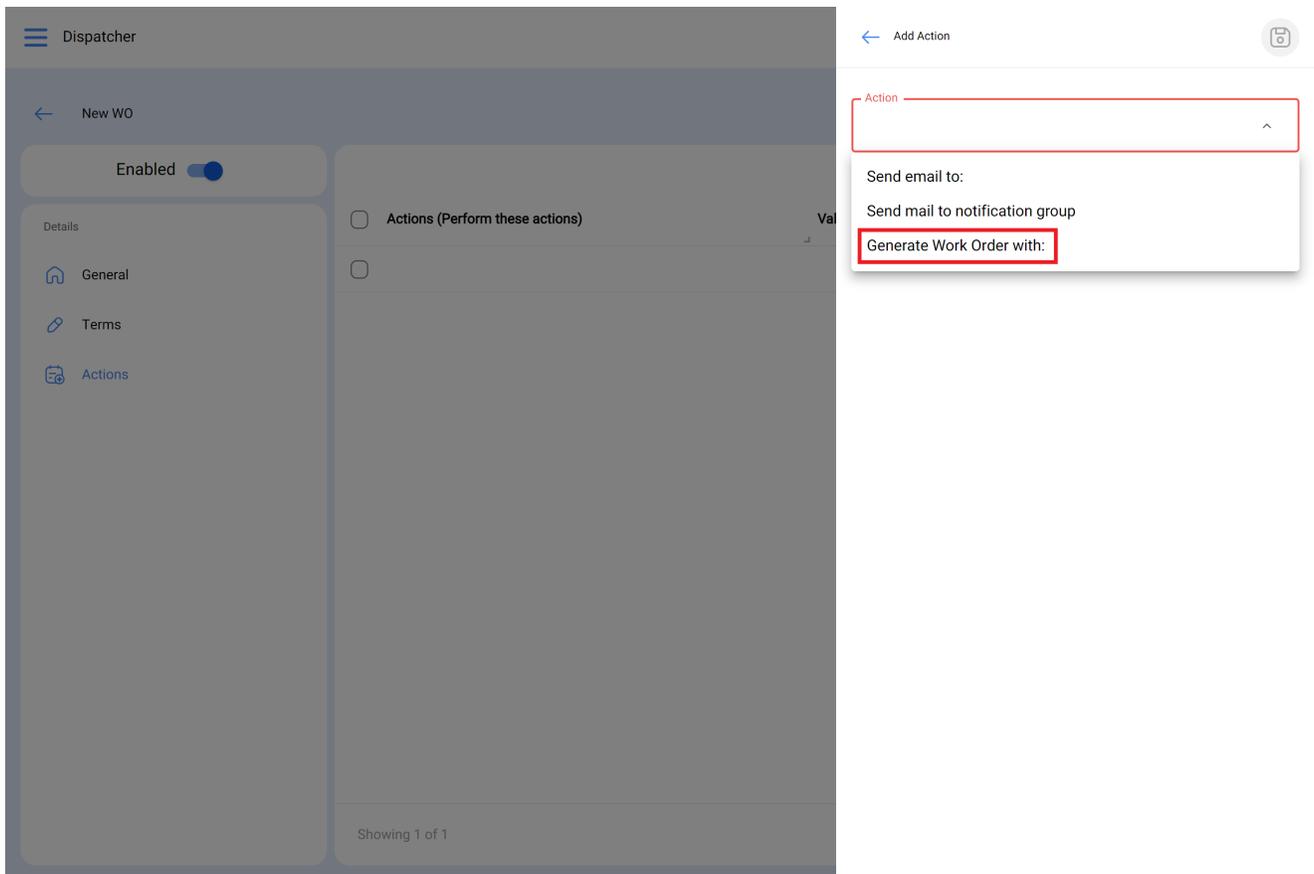
Here you can indicate the person Responsible, the Source of Inventory Resource, Source of Human Resources Resource and Source of Services Resource of the WO.
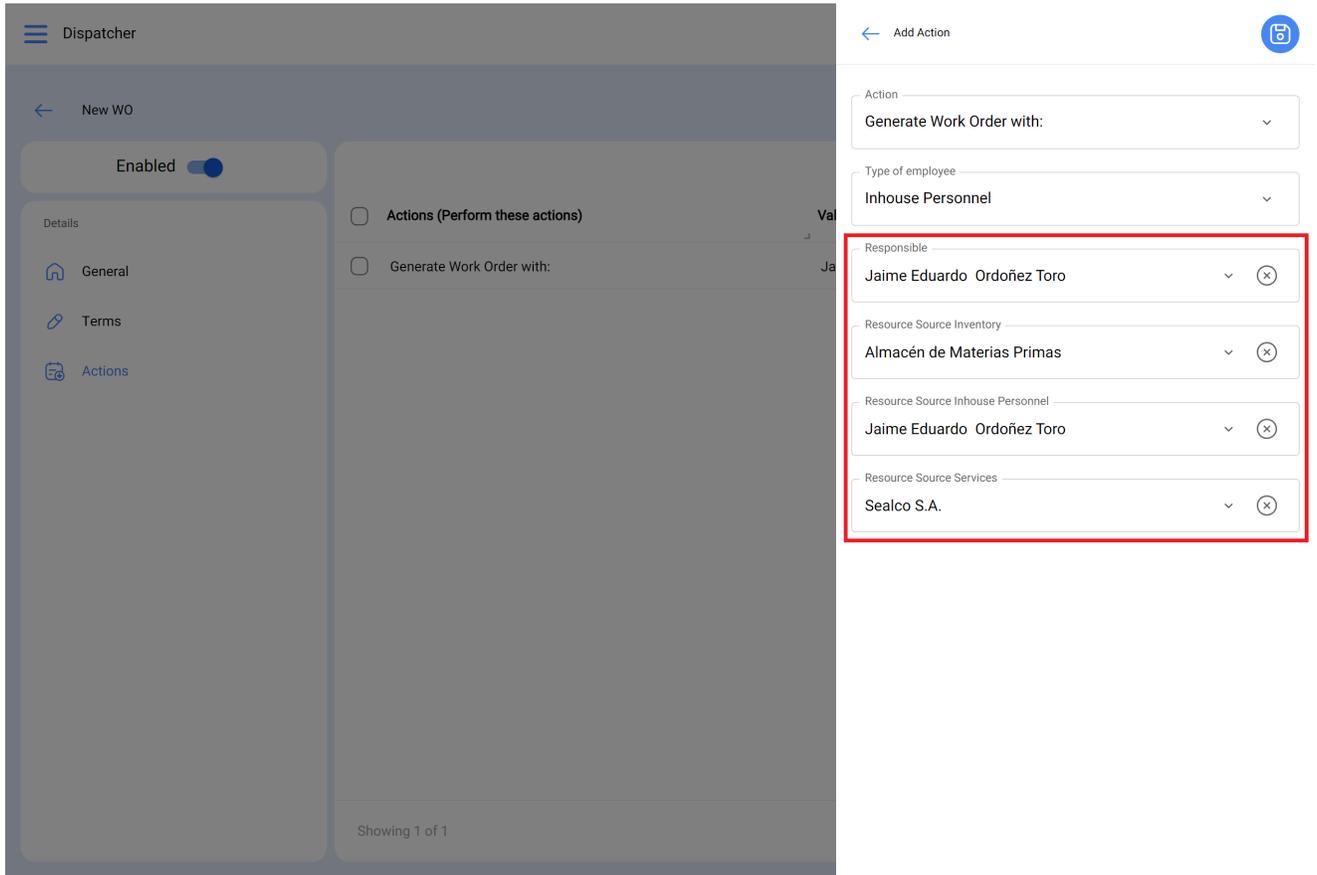
Once the action is selected, just click on save and go back to the main list and you will see the rule for automatically generating Work Orders from Pending Tasks.