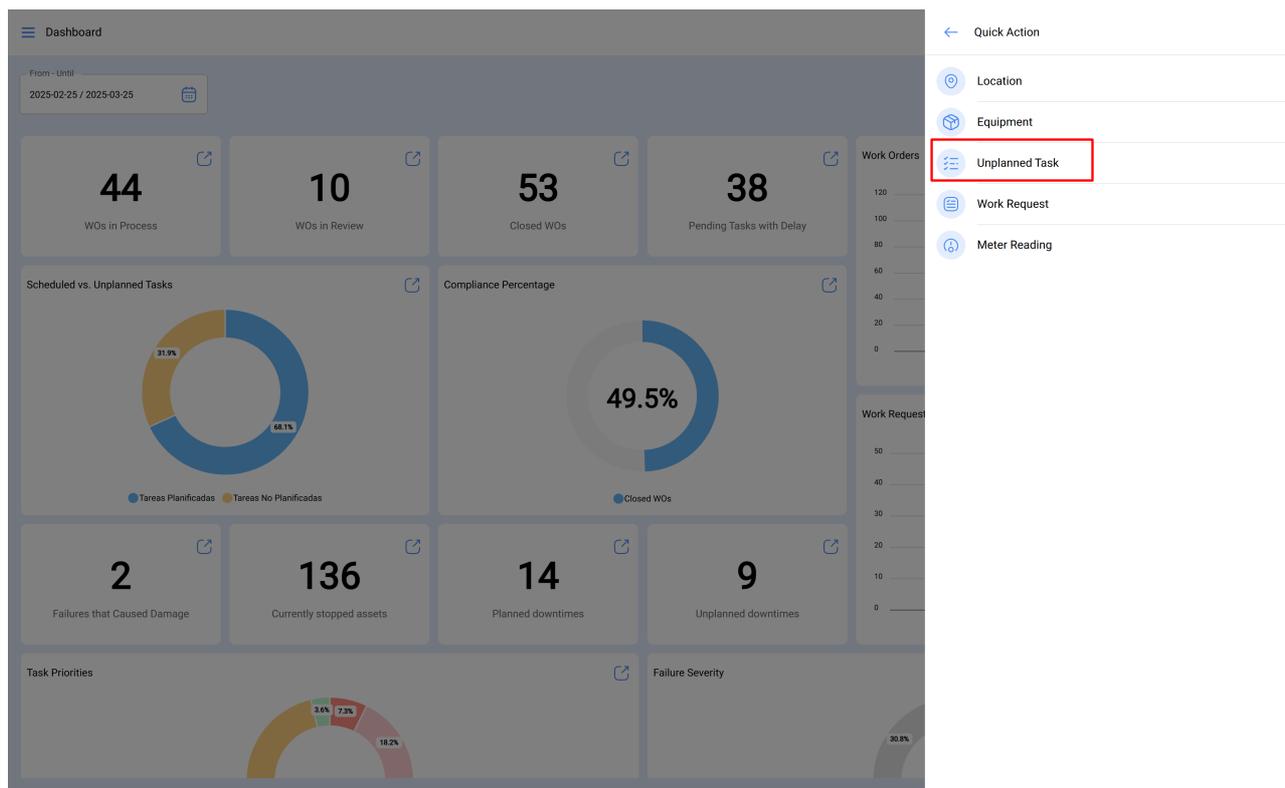
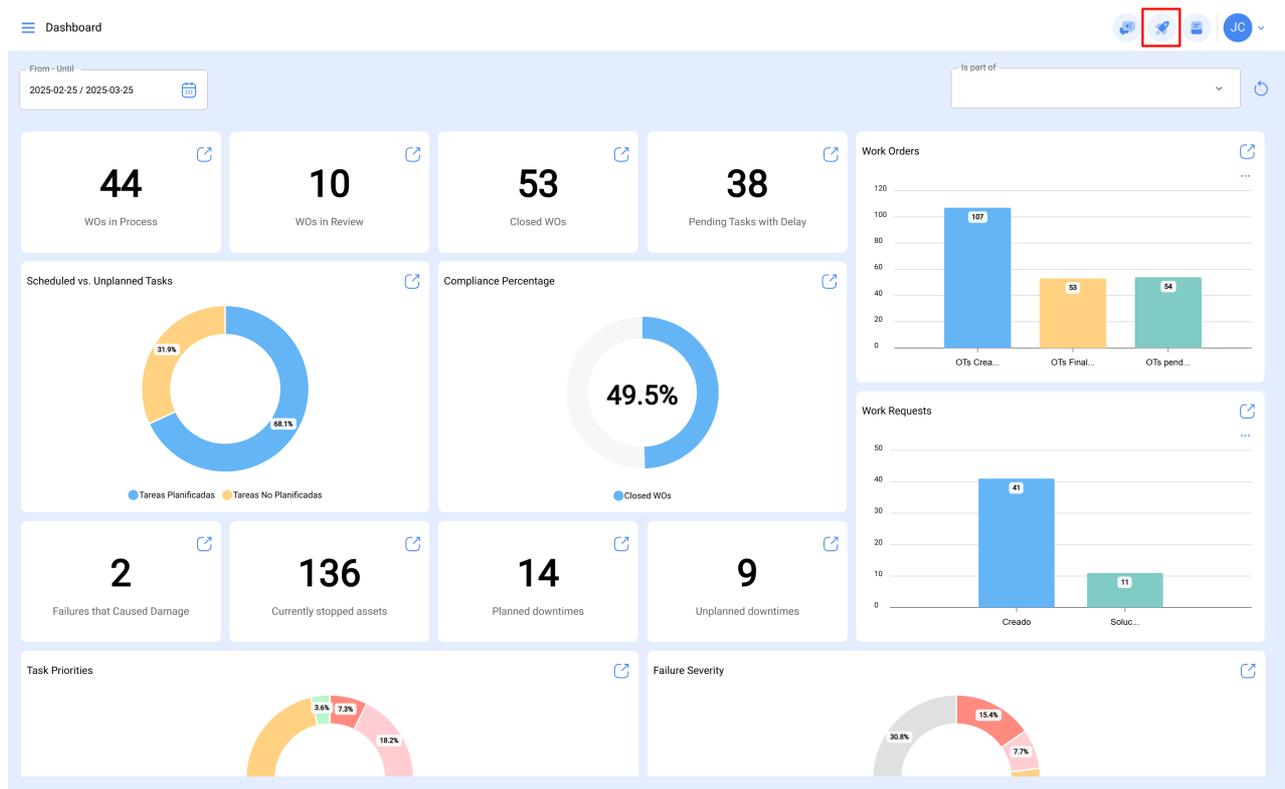


How to create unplanned WOs?

help.fractal.com/hc/en-us/articles/24911357256205-How-to-create-unplanned-WOs

From Rapid Action:

The quick action is a button that you will always find available in the top bar of the platform. To do so, just click on this option and then on unplanned task.



Clicking on it will enable a new window, where you must complete all the information corresponding to the unplanned task that can be sent to pending task (to be scheduled later) or generated as a new work order.

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

- **Step 1 (Assets):** Information associated with the asset and its status.
- **Step 2 (Task):** Information associated with the unplanned task.
- **Step 3 (SubTasks):** List with the sub-tasks or check-list (step-by-step) that must be fulfilled to successfully complete the task.
- **Step 4 (Resources):** Resources to be used in the execution and fulfillment of the task.

Step 1:

The screenshot shows a web form titled "Non Scheduled Tasks" with a navigation bar containing four steps: Asset, Task, Sub Tasks, and Resources. The "Asset" step is active. The form contains the following fields and options:

- Asset:** A dropdown menu with "Fractal { ACT.LOC-0001 }".
- Incident date:** A text input field containing "2025-03-25 16:15".
- Requested By:** A text input field containing "Jonas Campos".
- Has the asset failed?:** A checked checkbox.
- Fault Type:** A dropdown menu with "Alta temperatura".
- Fault Cause:** A dropdown menu with "condiciones medioambientales".
- Fault Detection Method:** A dropdown menu with "display".
- Fault Severity:** A dropdown menu with "Medium".
- Type of damage:** A dropdown menu with "None".
- It caused disruption of other assets?:** A text input field containing "000:00".
- Asset out of service:** A checked checkbox.
- Since when:** A text input field containing "2025-03-25 16:16".

A "Next >" button is located at the bottom left of the form.

In this step, the following information must be completed:

- **Asset:** Asset associated with the unplanned task.
- **Incident Date:** Date on which the incident occurred.
- **Requested by:** Person reporting the unplanned task (by default the owner of the account with which the task is being created).
- **Asset failure:** Option where you can indicate if the unplanned task involves asset failure.

- **Failure type:** Catalog with the types of failures associated to the assets.
- **Failure 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 with the fault hierarchy options according to its severity.
- **Type of damage caused:** List with predetermined options to identify the type of damage caused by the asset failure.
- **Interruption time to other assets:** Time in which the failure directly affects other assets.
- **Asset out of service:** State in which the equipment is stopped due to a functional failure. This field is of utmost importance, since when it is activated, the date and time since the equipment was stopped must be entered (this time is the one used for one of the availability indicators in the Business Intelligence module).

Step 2:

← Non Scheduled Tasks

✓ Asset
1 Task
0 Sub Tasks
0 Resources

Task Description

Note

Task type

Group 1

Group 2

Priority

Estimated Duration

Request Number

Has this task already been completed?

Options:

Send to pending tasks Send To WO's in Process

Actual Schedule Date

< Back
Next >

In this step, the following information must be completed:

- **Task Description:** Short detail where the task in question is specified.
- **Note:** Free field where some detail of the task can be added.
- **Task Type:** Catalog with all the types of tasks registered in the system.

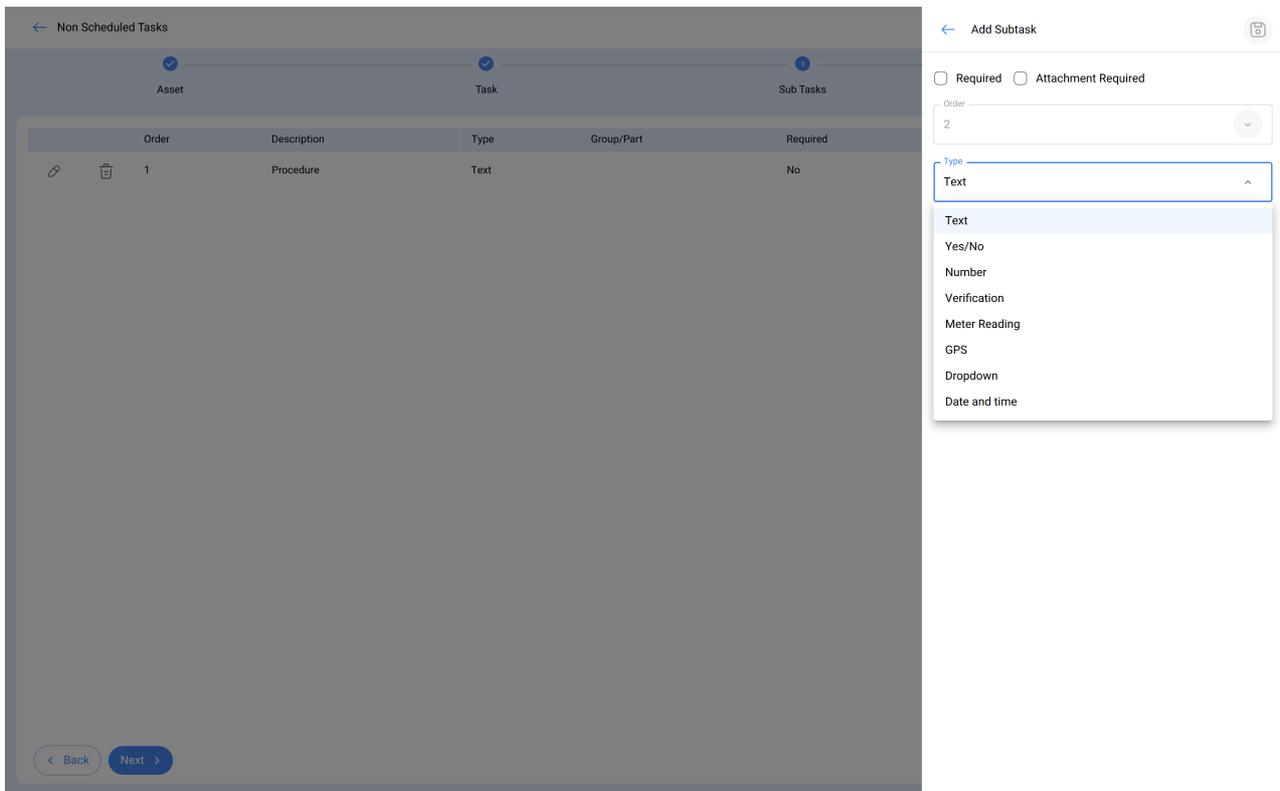
- **Classification 1 and 2:** Corresponds to free fields left by the platform to complete and give an additional classification to the task.
- **Priority:** List where the task is classified according to its priority.
- **Estimated Duration:** Theoretical time it would take to complete the task (the actual time is recorded directly in the TO).
- **Request Number:** Identification correlative of the request that generates the unplanned task.
- **This job has already been done:** Option that allows to identify in the system if the task has already been executed or not.
- **Options:** Available options to manage the unplanned task through a TO (the TO responsible must be added) or Pending Task (the date on which the task will be scheduled must be added).

Step 3:

In this step, the associated subtasks must be added, to do so, click on the add symbol at the bottom right of the platform and then add the subtasks as appropriate.

← Non Scheduled Tasks

Order	Description	Type	Group/Part	Required	Attachment Required
1	Procedure	Text		No	No



There are 8 types of subtasks:

- **Text:** Corresponds to subtasks that will be completed in a text type field.
- **Yes/No:** Corresponds to subtasks that will have a predefined answer with the options of Yes, No and N/A.
- **Number:** Corresponds to subtasks that will be completed with numeric characters.
- **Verifications:** Corresponds to subtasks that will have a predefined response with the options of Passed, Alert, Failure.
- **A meter reading:** The meter reading, from the unplanned work orders, allows a meter to be added for the technician or personnel present on site to take a spot measurement. This can include readings of amperage, voltage, kilometers, or other magnitudes depending on the need and the specific intervention required at that moment.
- **GPS :** Corresponds to the subtasks in which the geolocation of the device used at the time of completing the subtask will be taken in order to establish the time, date and geolocation instantly.
- **Dropdown:** Corresponds to subtasks where several options are shown and only one of them can be selected.
- **Date and time:** The date and time option corresponds to the technician's ability to record chronological information accurately. It can be used to indicate the date of the last oil change, the last preventive maintenance date, or any other relevant time event in the context of the intervention.

Asset Task Sub Tasks Resources

Order	Description	Type	Group/Part	Required	Attachment Required
1	Procedure	Text		No	No
2	procedure	Text		No	No

< Back Next >

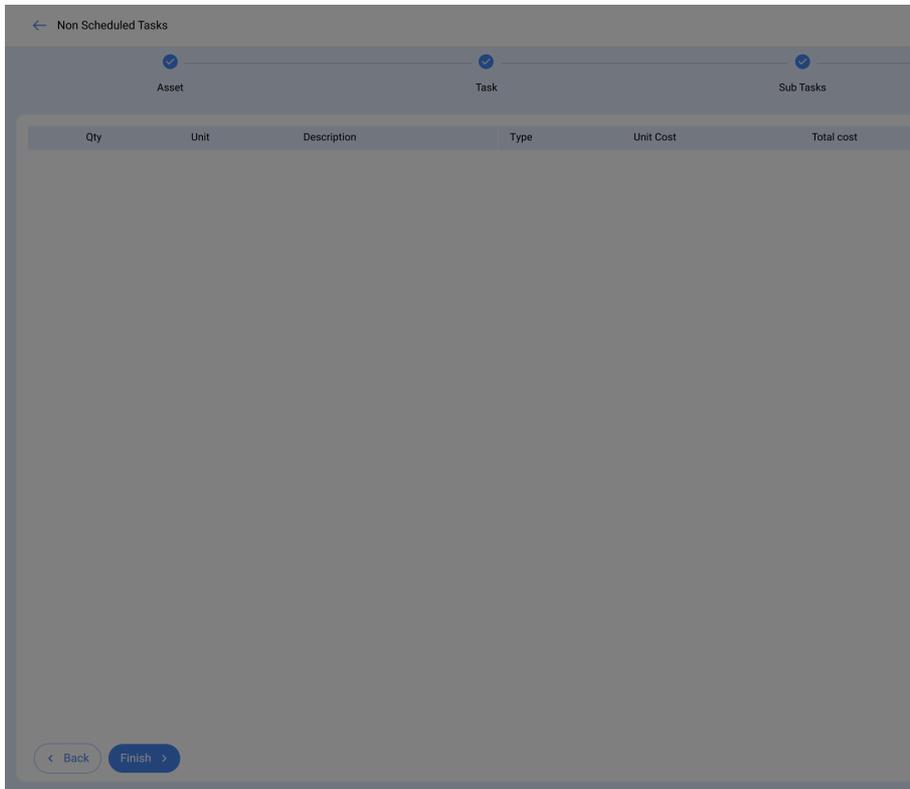
Step 4:

In this last step you can add the resources associated to the unplanned task, where you can add: Inventories, Human Resources, Services.

Asset Task Sub Tasks Resources

Qty	Unit	Description	Type	Unit Cost	Total cost	Resource Source
-----	------	-------------	------	-----------	------------	-----------------

< Back Finish >

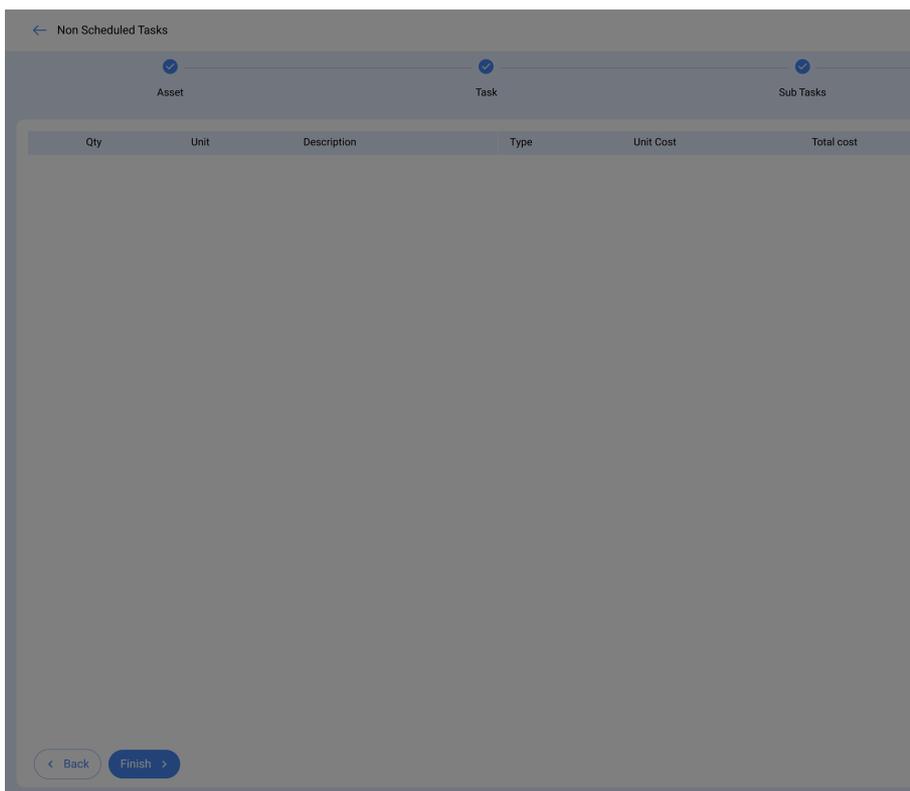


← New Resource ✓

Resource Type

Resource Type can't be blank

Notes



← New Resource ✓

Resource Type

- Inventory
- Inhouse Personnel
- Services

- **Inventory:** Corresponds to the resources (Tools, Spare Parts and Supplies) coming from a warehouse and that are necessary in the execution of the task.
- **Inhouse personnel:** Corresponds to the man-hours to be accounted for in the TO.
- **Services:** Corresponds to the costs associated with external services performed by third parties registered in the platform (third party module).

After choosing the type of resource, it is necessary to complete the remaining information, as shown in the image.

← Non Scheduled Tasks

Asset Task Sub Tasks

Qty Unit Description Type Unit Cost Total cost

← Back Finish →

← New Resource ✓

Resource Type
Inventory

Tool / Spare Parts and Supplies

Description can't be blank

Unit

Qty
0

Qty must be greater than 0

Unit Cost
\$ MXN 0

Total cost
\$ MXN 0,00

Notes

In the above example, when selecting the inventory option, another option called "Tool/Spare Parts and Supplies" is enabled. This is because, from the inventory recorded in Fractal One, the specific selection of the required items will be made.

← Non Scheduled Tasks

Asset Task Sub Tasks

Qty Unit Description Type Unit Cost Total cost

← Back Finish →

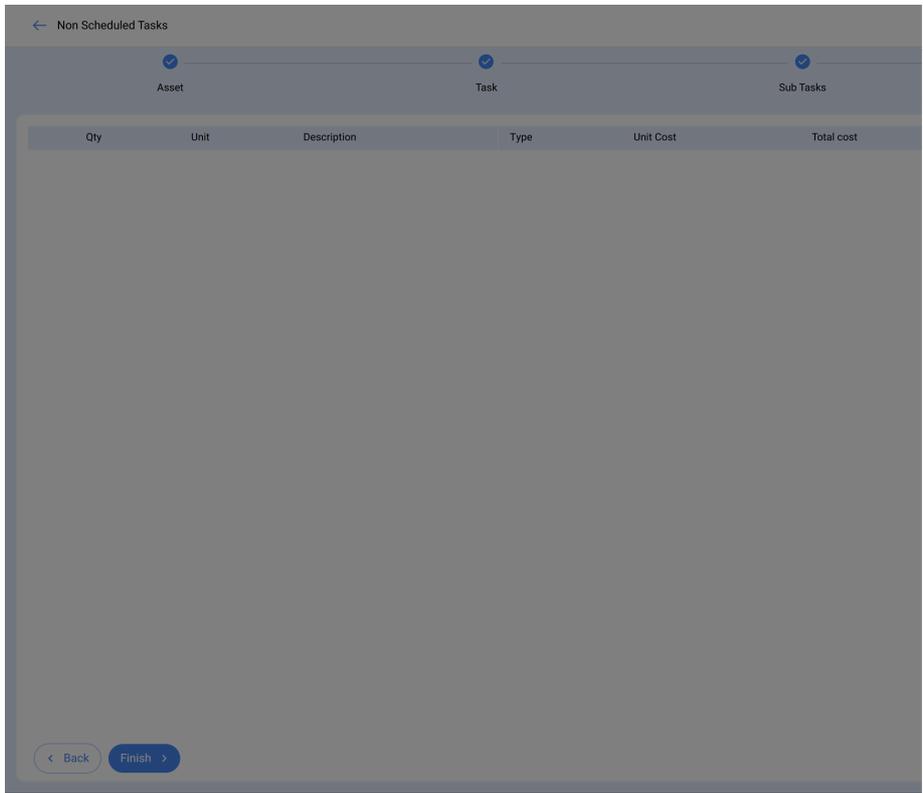
← Q ×

{ DET-001 } DETERGENTE

Type: Spare Parts
Code: DET-001
Priority:
Location: //

Showing 1 of 1

Finally, the quantity of items to order.



← New Resource ✓

Resource Type
Inventory

Tool / Spare Parts and Supplies
☉ DETERGENTE { DET-001 } ✕

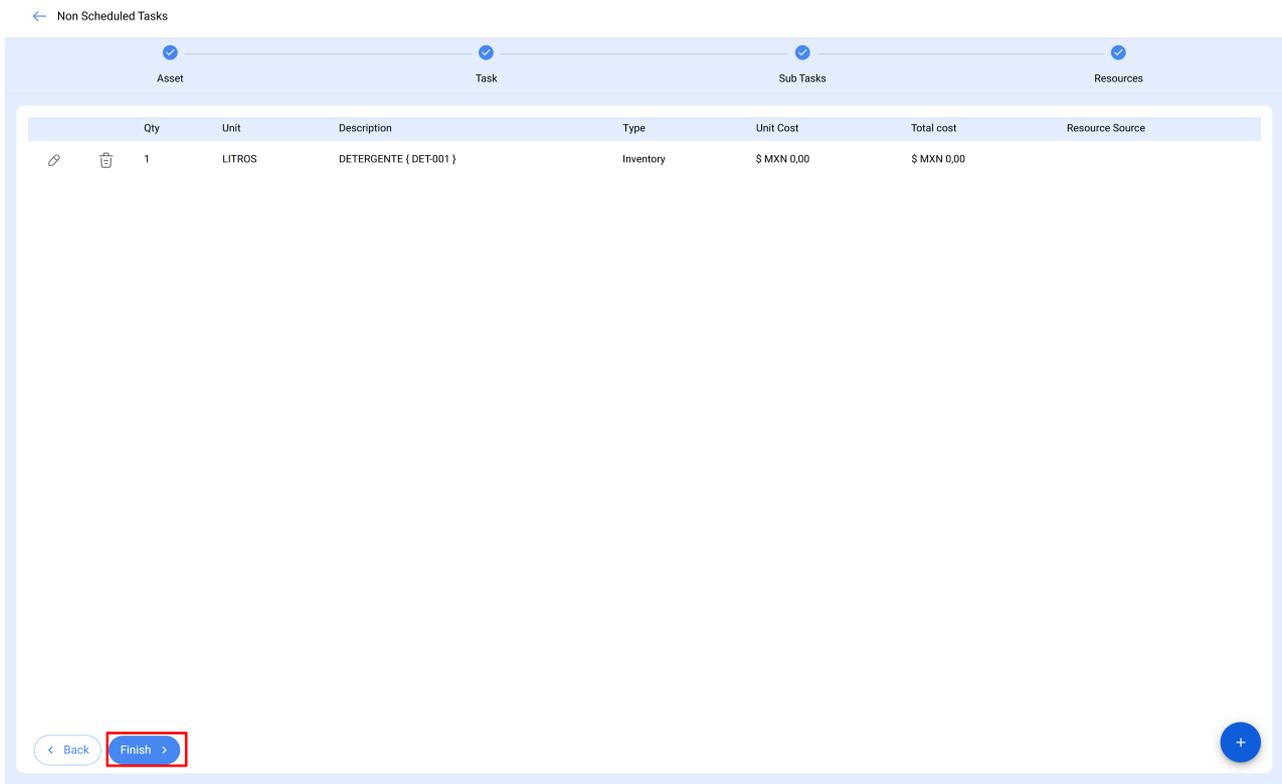
Unit
LITROS

Qty
1

Unit Cost
\$ MXN 0

Total cost
\$ MXN 0,00

Notes



Then click on finish to generate the work order or the pending task associated with the unplanned task.

From the TOs module:

To add an Unplanned Task from the TOs module, you can enter any of the views (Kanban, Timeline and List) that you will find in that module and click on the add option that you will find available all the time at the bottom right of the window.

Work Management
View Kanban

Pending Tasks 155

- Asset: (GR12) 401
Task: Mantenimiento por horas
00:10 2025-03-25
EACH 500 HORA (HR) [H] [C]
- Asset: (BOMB-02) BOMBA DIESEL N°2
Task: INSPECCIÓN ANUAL PREVIO PRUEBA
00:10 2026-03-21
EVERY 1 YEAR(S)
- Asset: Wala Barcelona (M0227)
Task: Revisión anual de calentadores de agua caliente sanitaria a gas 24,4 kW - Pn ≤ 70 kW.
00:10 2027-03-01
EVERY 2 YEAR(S)
- Asset: Wala Barcelona (M0227)

WOs in Process 2742

- OT-27-GR
Created by Ricardo Rangel
Asset: 004 CH PLAZA MAYOR
Task: MTTO 2500
00:10 2025-03-25
Abelardo Perez
- OT-23-GR
Created by BAUTISTA LABAYEN
Asset: RIBEIRO SRL (LOC.RB-00)
Task: Fallo de luces bajas delanteras
01:00 2025-03-25
Ricardo Cadario
- OT-22-GR
Created by Diego Vergara
Asset: (BT-003) Belt conveyor
Task: VALVULA SE ROMPIO
00:10 2025-03-25
Adrian
- OT-20-GR
Created by Juan Pablo Hidalgo
Asset: Work Management:
01 2

WOs in Review 214

- OT-24-GR
Created by JOSÉ FERNANDO CRUZ MOSQUEDA
Asset: (COMP-01) COMPRESOR RECIPROCANTE 01 ZHONGHE 250 KG
Task: No enciende máquina
00:30 2025-03-25
Miguel Mosqueda
- OT-19-GR
Created by ALEXANDER SANCHEZ
Asset: bomba diesel 01 ()
Task: INSPECCIÓN ANUAL PREVIO PRUEBA
00:10 2026-03-21
Juan Pablo Hidalgo
- OT-14-GR
Created by Alexander Fuentes
Asset: Wala Barcelona (M0227)
Task: Work Management:
01 2
00:20 2026-03-02
Abelardo Perez
- OT-2461
Created by Jonas Campos
Asset: (00001-2) FA mantenimiento J 22-03-24

Closed WOs 2411

- OT-26-GR
Created by Elias Alves
Asset: (eixoy-0001) eixo y
Task: Troca do motor
00:10 2025-03-25
Elias Alves
- OT-25-GR
Created by Elias Alves
Asset: CENTRO COMERCIAL EL TESORO (CC-TER)
Task: teste
00:10 2025-03-25
Abraham - Triarc
- OT-21-GR
Created by ImèneChakroun
Asset: CENTRO COMERCIAL EL TESORO (CC-TER)
Task: reparación de puerta de cold room
00:10 2025-03-25
Abelardo Perez
- OT-19-GR
Created by Juan Pablo Hidalgo
Asset: (BOMB-02) BOMBA DIESEL N°2
CANCELLED
+

Kanban View

Work Management
View Calendar

Pending Tasks Work Orders

Calendar Month 2025-03-25

Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	01
	13:54 OT-2374-FRA 11:46 PAUTA DE MANTENIMIENTO GEI 12:00 OT-2371-FRA + 3 More	09:34 EJEMPLO AUTOMATIZADOR IMF 09:34 OT-2376-FRA + 5 More	13:53 OT-2380-IMP 13:54 OT-2381-IMP + 3 More	06:44 OT-2387-IMP 11:45 OT-2386-IMP 13:00 OT-2388-IMP + 5 More	03:00 OT-2392-IMP 06:35 Registro de temperatura - Diario 06:35 Registro de temperatura - Diario + 12 More	05:00 OT-2328-FRA 08:00 MANTENIMIENTO ANUAL 08:00 MANTENIMIENTO ANUAL + 5 More
02	03	04	05	06	07	08
	03:00 OT-2311-FRA 05:24 OT-2404-IMP 06:24 OT-2407-IMP + 5 More	13:32 OT-1116-FRA 14:48 Troca dos parafusos da base viu + 2 More	15:55 OT-2294-FRA + 5 More	11:00 OT-2422-IMP 11:00 OT-2409-IMP 13:13 OT-2412-IMP + 5 More	20:43 OT-2416-IMP 16:52 OT-2402-IMP + 2 More	100%
09	10	11	12	13	14	15
	11:53 Mantenimiento Semestral 11:53 CENIN100024 + 7 More	08:54 OT-2423-IMP 15:00 OT-2424-IMP 15:03 OT-2426-IMP + 11 More	12:00 OT-2309-FRA + 8 More	09:33 MANTENIMIENTO MENSUAL 09:35 Revisión de estado de filtro - Mer + 7 More	09:24 OT-2454-IMP 12:00 OT-2442-IMP + 5 More	07:26 REGISTRO DE MEDIDORES 15:24 PREV_HID_03-ANUAL + 5 More
16	17	18	19	20	21	22
	11:00 OT-2422-IMP 08:35 INSPECCIÓN MENSUAL 12:00 OT-2432-IMP + 3 More	07:26 OT-2355-FRA 09:43 OT-2460 + 5 More	10:46 OT-5-2025 13:39 OT-2445-IMP + 3 More	10:10 OT-2449-IMP 15:52 OT-8-GR + 8 More	100%	15:00 OT-15-GR 100%
23	24	25	26	27	28	29
	11:00 OT-2422-IMP	06:51 OT-21-GR 09:41 Mantenimiento por horas + 13 More	08:16 OT-1041-24 08:32 OT-1042-24	16:48 MANTENIMIENTO A SISTEMA EL 16:51 MANTENIMIENTO A SISTEMA H 20:30 OT-2436-IMP 0%	100%	100%
30	31	01	02	03	04	05
	11:00 OT-2422-IMP	09:00 OT-2367-FRA 0%				100%

View pending tasks:

Work Management
Pending Tasks

Search...

Actual Schedule Date: Mar 31/2025

	Code	Asset	Task	Trigger	Delay	Planned Maintenance	Auto Schedule Date...	Actual Schedule Dat...	Out of Service
<input type="checkbox"/>	GR12	{ GR12 } 401	Mantenimiento por horas	Reading Each 500 Hora (Hr) ...	0	Locomotora GR12	2025-03-25 09:41	2025-03-25 09:41	No
<input type="checkbox"/>	ELCO-ELTE-01	EL CORRAL { ELCO-ELTE-01 }	El molino 1 no funciona	Non Scheduled Tasks	4		2025-03-20 17:00	2025-03-20 17:00	No
<input type="checkbox"/>	GRU-AV-G03...	HOYO 17 { GRU-AV-G03-CG1...	HOYO INUNDADO	Non Scheduled Tasks	4		2025-03-20 16:58	2025-03-20 16:58	No
<input type="checkbox"/>	{ COMPRESOR 1		LECTURA DE HOROMETROS	Date Every 3 Day(s)	11	PLAN DE MTTO A COMPRE...	2025-03-14 15:03	2025-03-14 15:03	No
<input type="checkbox"/>	{ AIREADOR 1		MANTENIMIENTO ESPECIAL	Date Every 1 Week(s)	8	Plan de mantenimiento Aire...	2025-03-17 14:43	2025-03-17 14:43	No
<input type="checkbox"/>	{ AIREADOR 1		MANTENIMIENTO ESPECIAL	Date Every 1 Week(s)	1835	Plan de mantenimiento Aire...	2020-03-16 15:00	2020-03-16 15:00	No
<input type="checkbox"/>	GE-001	{ GE-001 } Gerador	Manutenção corretiva baixa ...	Reading When Temperature ...	25	Plano de Manutenção do Ge...	2025-02-28 10:45	2025-02-28 10:45	No
<input type="checkbox"/>	MOTELEC	{ MOTELEC } MOTOR ELECT...	Registro diario de temperatu...	Date Every 1 Day(s)	25	ACOPLADOR	2025-02-28 06:39	2025-02-28 06:39	No
<input type="checkbox"/>	C1	Empresa Matriz { C1 }	Registro diario de temperatu...	Date Every 1 Day(s)	25	ACOPLADOR	2025-02-28 06:36	2025-02-28 06:36	No
<input type="checkbox"/>	MOTELEC	{ MOTELEC } MOTOR ELECT...	Registro de temperatura - Di...	Date Every 1 Day(s)	25	ACOPLADOR	2025-02-28 06:35	2025-02-28 06:35	No
<input type="checkbox"/>	C1	Empresa Matriz { C1 }	Registro de temperatura - Di...	Date Every 1 Day(s)	25	ACOPLADOR	2025-02-28 06:35	2025-02-28 06:35	No
<input type="checkbox"/>	{ Prensa 2		MANTENIMIENTO MENSUAL	Date Every 1 Months	0	PLAN DE MANTENIMIENTO ...	2025-03-25 14:49	2025-03-25 14:49	No
<input type="checkbox"/>	{ Prensa 1		MANTENIMIENTO MENSUAL	Date Every 1 Months	0	PLAN DE MANTENIMIENTO ...	2025-03-25 14:49	2025-03-25 14:49	No
<input type="checkbox"/>	{ Prensa 2		MANTENIMIENTO A SISTE...	Date Every 1 Months	0	PLAN DE MANTENIMIENTO ...	2025-03-25 14:41	2025-03-25 14:41	No
<input type="checkbox"/>	{ Prensa 2		MANTENIMIENTO A SISTE...	Date Every 1 Months	0	PLAN DE MANTENIMIENTO ...	2025-03-25 14:41	2025-03-25 14:41	No
<input type="checkbox"/>	{ Prensa 2		MANTENIMIENTO A SISTE...	Event SOLICITADO POR PRO...	21	PLAN DE MANTENIMIENTO ...	2025-03-04 15:31	2025-03-04 15:31	No

Showing 50 of 94

After clicking, you must complete all the necessary steps to create the unscheduled task, as explained at the beginning of this article.

← Non Scheduled Tasks

1 Asset 2 Task 3 Sub Tasks 4 Resources

Asset

Asset can't be blank

Incident date Requested By

Has the asset failed?

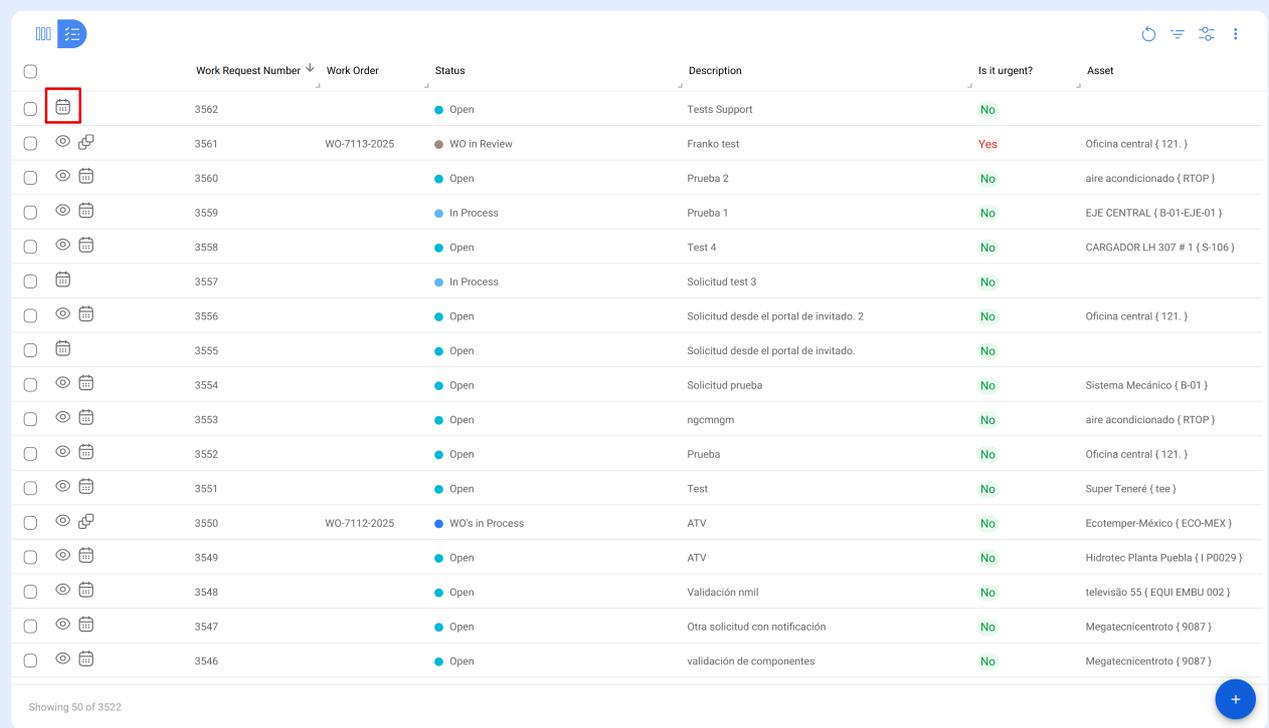
Next >

Note: In the session on how to generate an unplanned TO "From the Quick Action" you will find a detailed step-by-step to complete each of the fields required for the generation of an Unplanned TO.

From Work Requests:

Once a work request has been generated, the system allows you to manage this request through an unplanned task by clicking on the add symbol

Requests
Work Request



	Work Request Number ↓	Work Order	Status	Description	Is it urgent?	Asset
<input type="checkbox"/>	3562		● Open	Tests Support	No	
<input type="checkbox"/>	3561	WO-7113-2025	● WO in Review	Franko test	Yes	Oficina central { 121. }
<input type="checkbox"/>	3560		● Open	Prueba 2	No	aire acondicionado { RTOP }
<input type="checkbox"/>	3559		● In Process	Prueba 1	No	EJE CENTRAL { B-01-EJE-01 }
<input type="checkbox"/>	3558		● Open	Test 4	No	CARGADOR LH 307 # 1 { S-106 }
<input type="checkbox"/>	3557		● In Process	Solicitud test 3	No	
<input type="checkbox"/>	3556		● Open	Solicitud desde el portal de invitado. 2	No	Oficina central { 121. }
<input type="checkbox"/>	3555		● Open	Solicitud desde el portal de invitado.	No	
<input type="checkbox"/>	3554		● Open	Solicitud prueba	No	Sistema Mecánico { B-01 }
<input type="checkbox"/>	3553		● Open	ngcmngm	No	aire acondicionado { RTOP }
<input type="checkbox"/>	3552		● Open	Prueba	No	Oficina central { 121. }
<input type="checkbox"/>	3551		● Open	Test	No	Super Teneré { tee }
<input type="checkbox"/>	3550	WO-7112-2025	● WO's in Process	ATV	No	Ecotemper-México { ECO-MEX }
<input type="checkbox"/>	3549		● Open	ATV	No	Hidrotec Planta Puebla { I P0029 }
<input type="checkbox"/>	3548		● Open	Validación nmil	No	televisão 55 { EQUI EMBU 002 }
<input type="checkbox"/>	3547		● Open	Otra solicitud con notificación	No	Megatecnicroto { 9087 }
<input type="checkbox"/>	3546		● Open	validación de componentes	No	Megatecnicroto { 9087 }

Showing 50 of 3522

Then clicking on it will open a new window, where all the information corresponding to the unplanned task must be completed before it is generated as a TO.

← Non Scheduled Tasks

Asset Task Sub Tasks Resources

Asset

Asset can't be blank

Incident date: 2025-03-25 16:24

Requested By: Jonas Campos

Has the asset failed?

Next >

Note: In the session on how to generate an unplanned TO "From the Quick Action" you will find a detailed step-by-step to complete each of the fields required for the generation of an Unplanned TO.