

Virtual planner

help.fractal.com/hc/en-us/articles/25285859187213-Virtual-planner

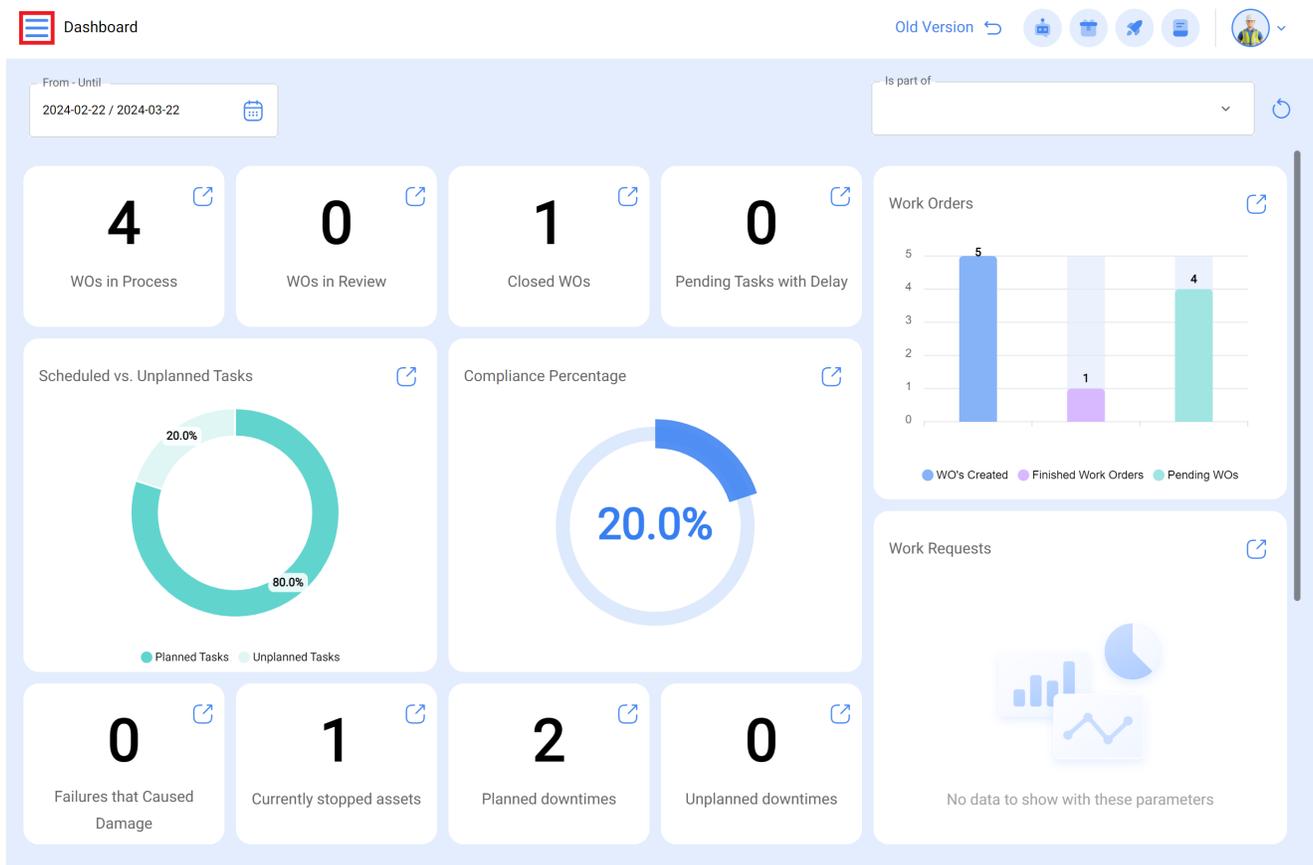
The virtual planner add-on allows you to create two additional rules in the “Dispatcher” module:

- 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.



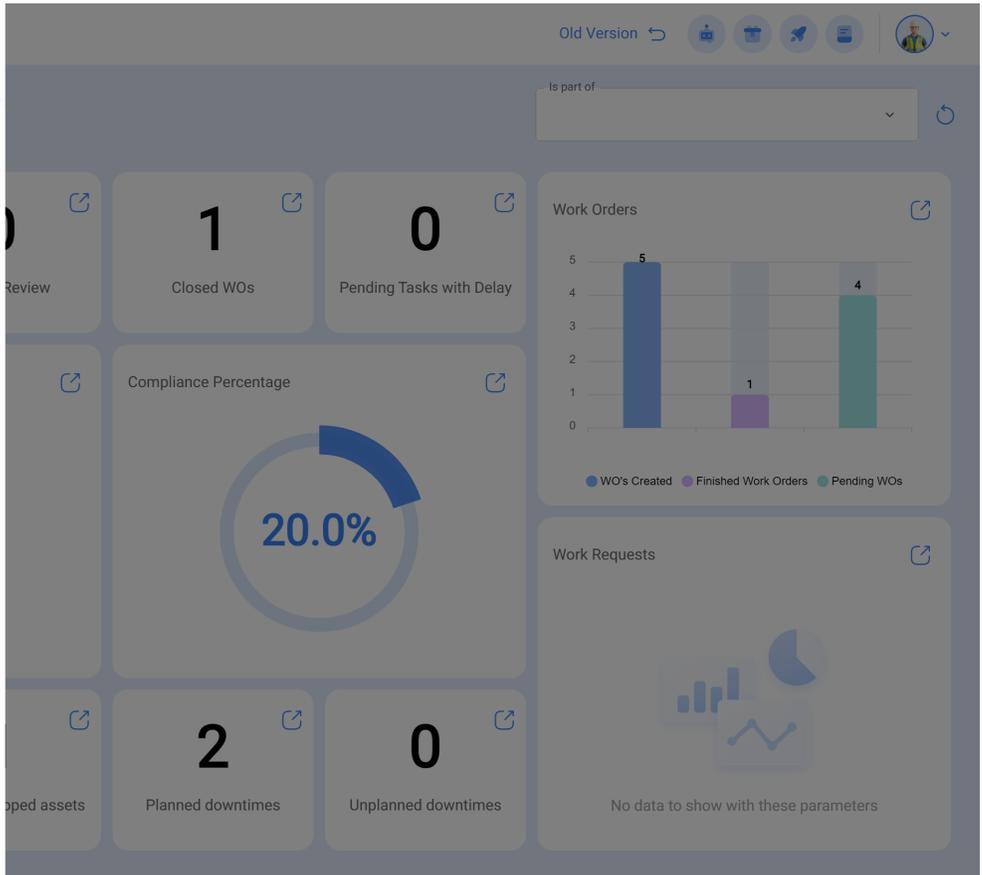
Go to the “Dispatcher” module.



- Catalogs
- Warehouses
- Work Management
- Monitoring
- Dispatcher**
- Events
- Fractal Hub
- Business Intelligence
- Cloud Disk
- Requests
- Online help

Chat Support

Commit: cd6de02
BuiltTime: Invalid date



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

Dispatcher

Search...

Old Version

	Description	Module	Submodule	Event
<input type="checkbox"/>				
<input checked="" type="checkbox"/>	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

Dispatcher 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

Details

- 🏠 **General**
- 🔗 Terms
- 📅 Actions

Module <input type="text"/>	Submodule <input type="text"/>
Event <input type="text"/>	Description <input type="text"/>

Description can't be blank

← Save

Enabled

Required Information

- Description can't be blank

Details

- General
- Terms
- Actions

Module: Work Requests

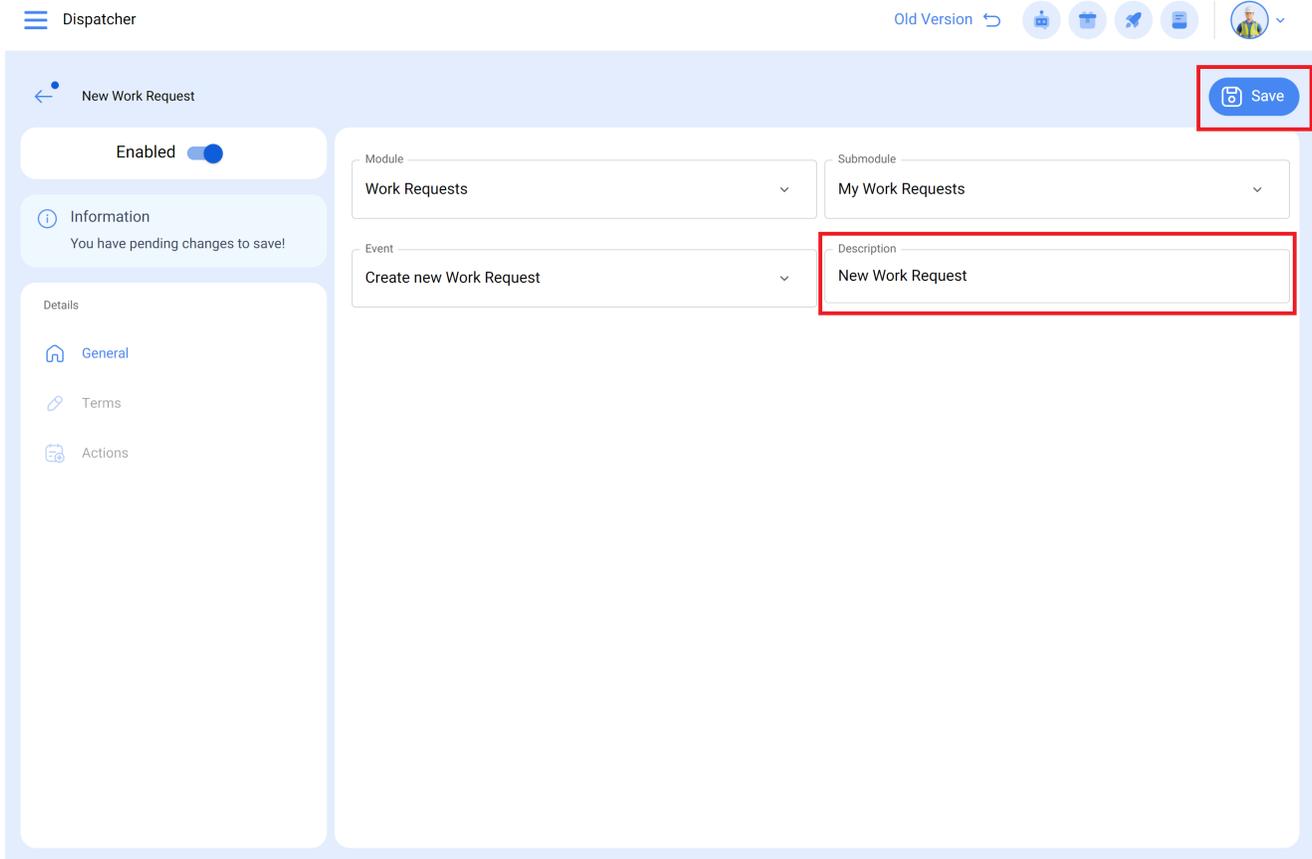
Submodule: My Work Requests

Event: Create new Work Request

Description

Description can't be blank

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.

New Work Request

Save

Enabled

Details

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



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

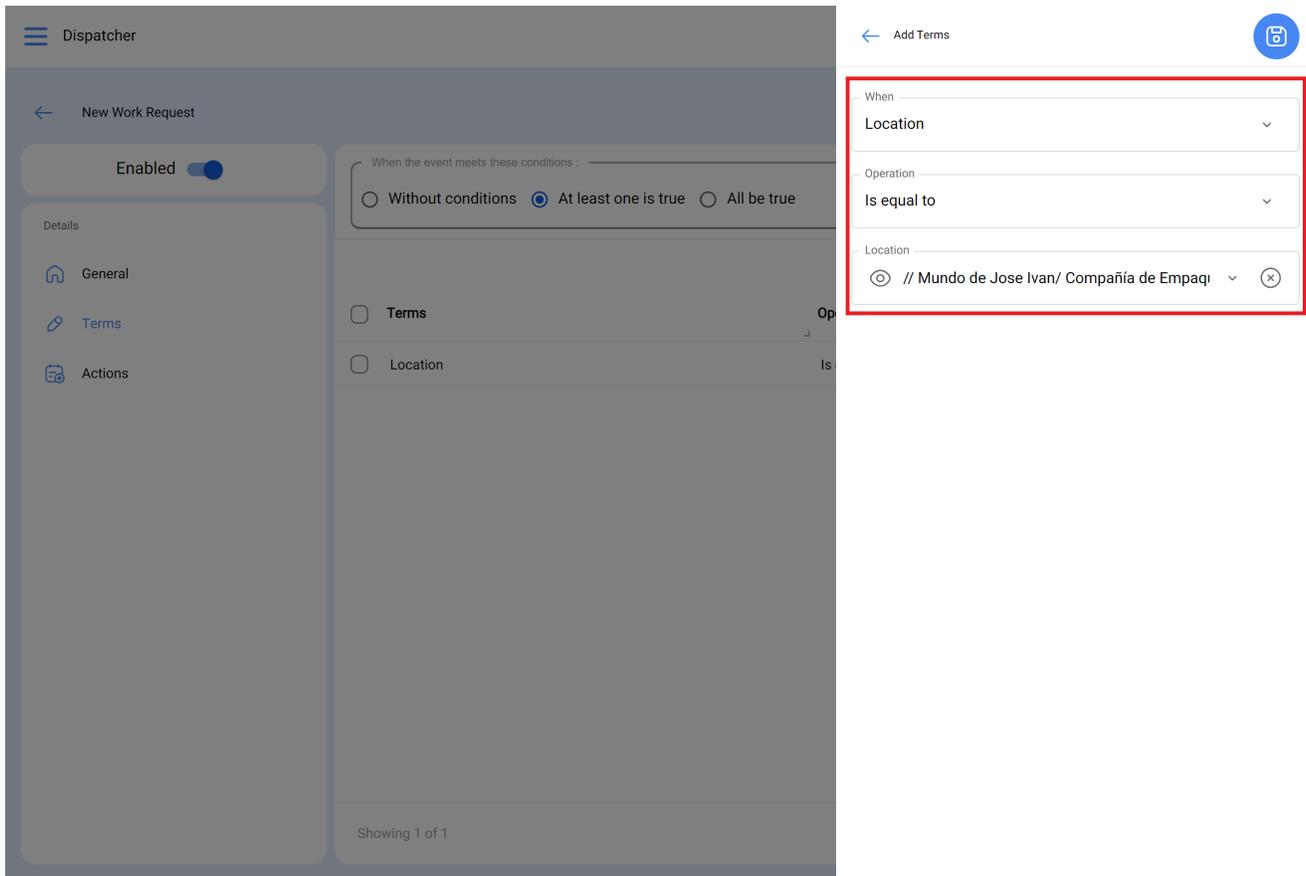
Add Terms

Save

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:

← New Work Request Save

Enabled

Details

- General
- Terms
- Actions

When the event meets these conditions :

Without conditions At least one is true All be true

	Operation	Value
<input type="checkbox"/> Terms		
<input type="checkbox"/> Location	Is equal to	// Mundo de Jose Ivan/ Compañía de Empaques/ Planta Metal

Showing 1 of 1 +

- **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.

New Work Request. Save

Enabled

Information
You have pending changes to save!

Details

- General
- Terms
- Actions

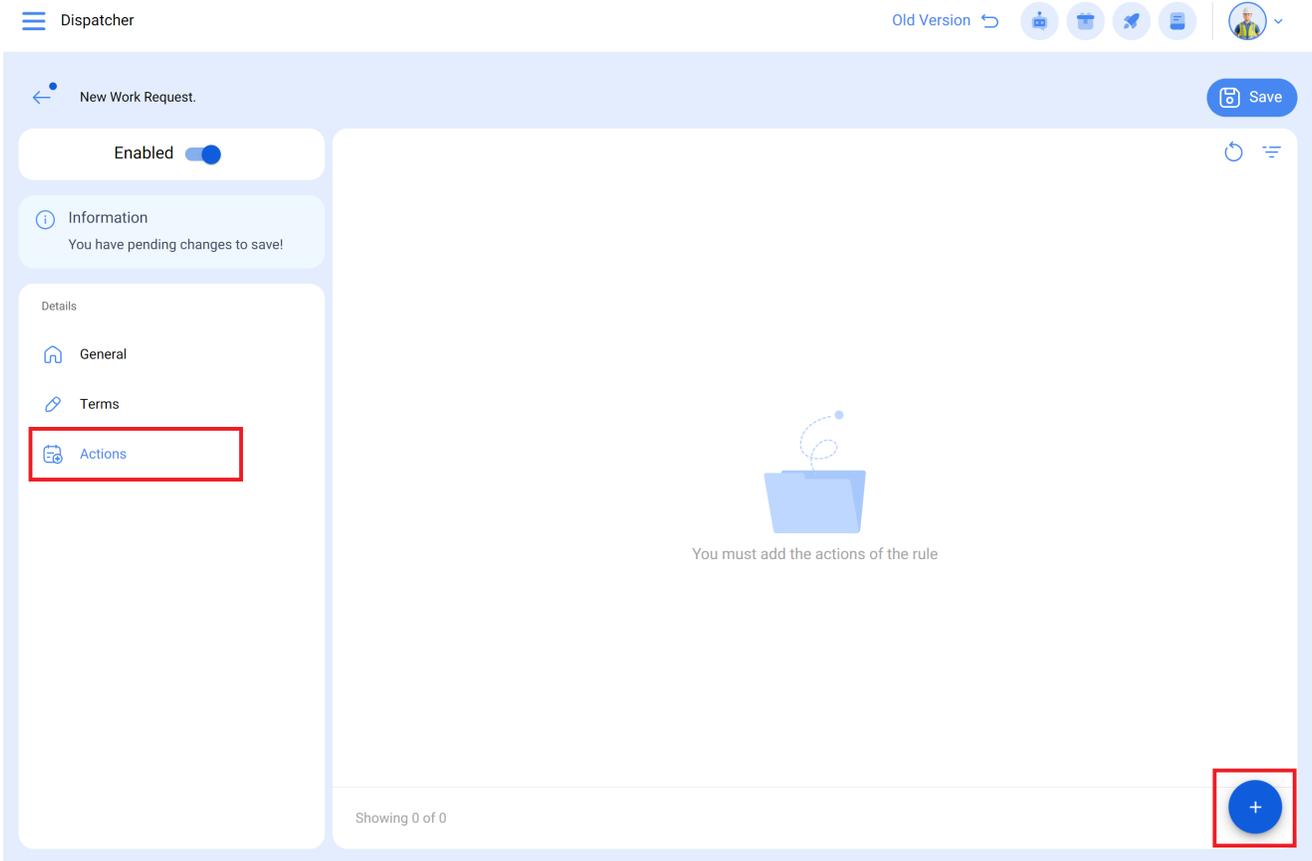
When the event meets these conditions :

Without conditions At least one is true All be true

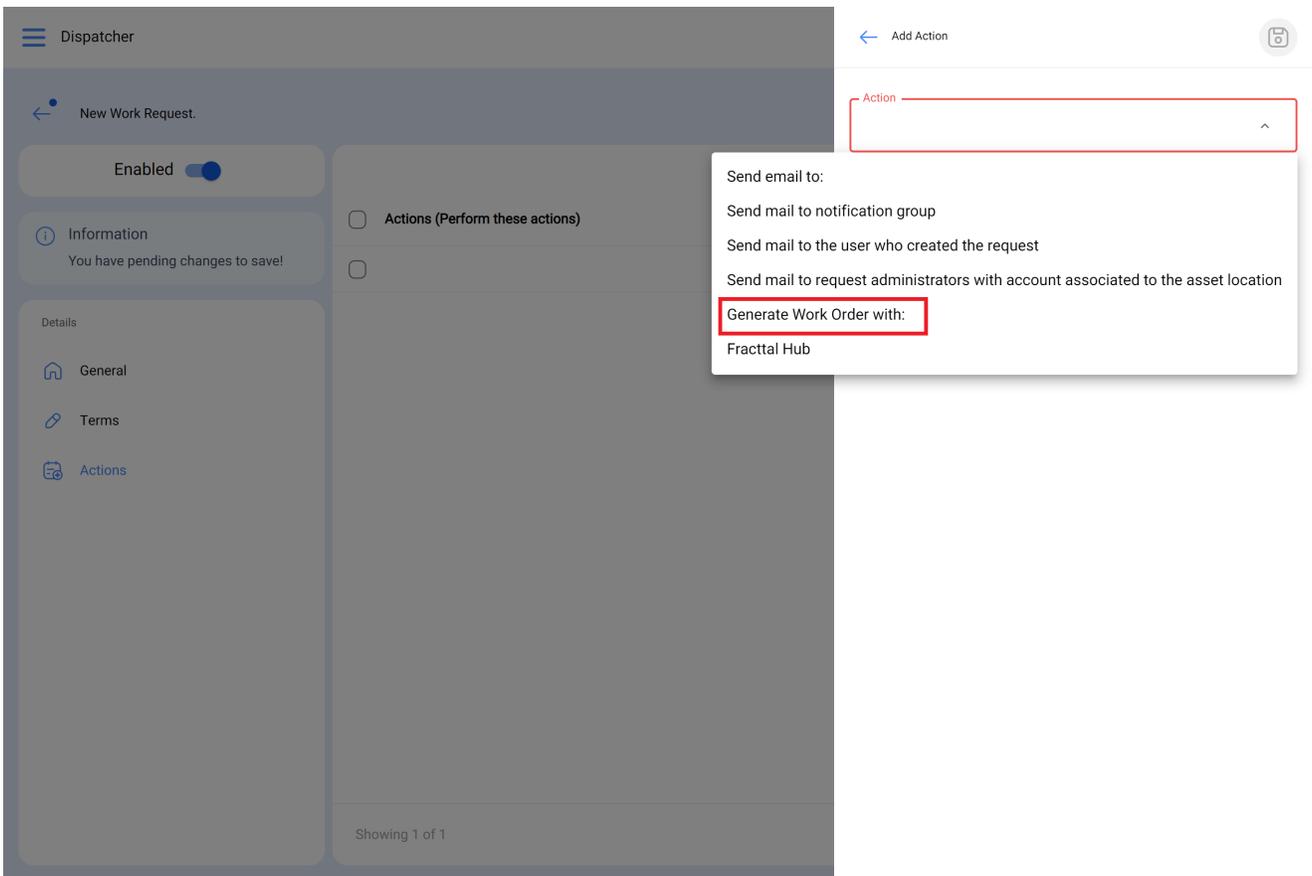
<input type="checkbox"/> Terms	Operation	Value
<input type="checkbox"/> Priority	Is equal to	Very High
<input type="checkbox"/> Location	Is equal to	// Mundo de Jose Ivan/ Compañía de Empaques/ Planta Metal

Showing 2 of 2 +

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.

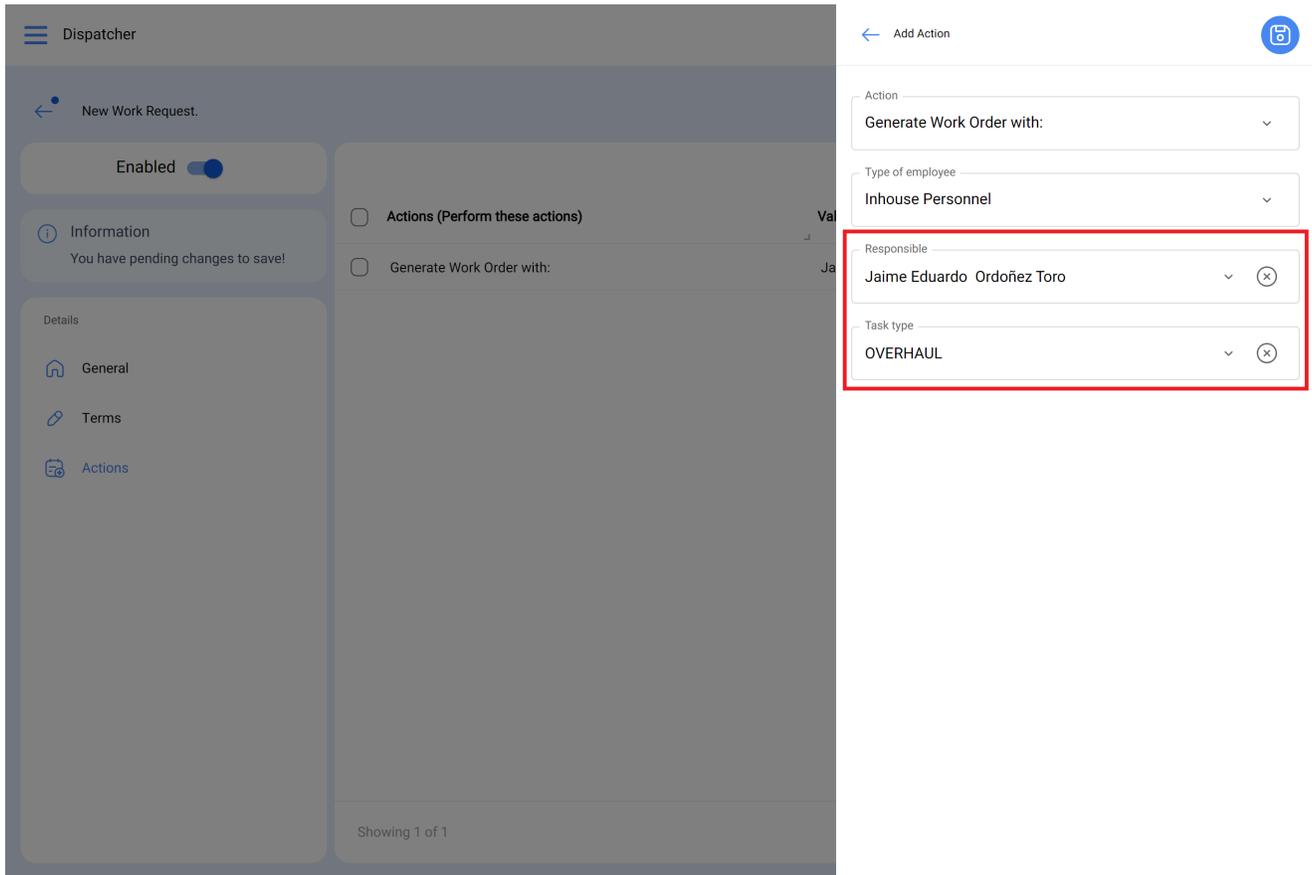


Here there are five actions to choose from. Select "Generate Work Order with:"



Here you can select the person responsible and the type of task for the WO generated by the rule.

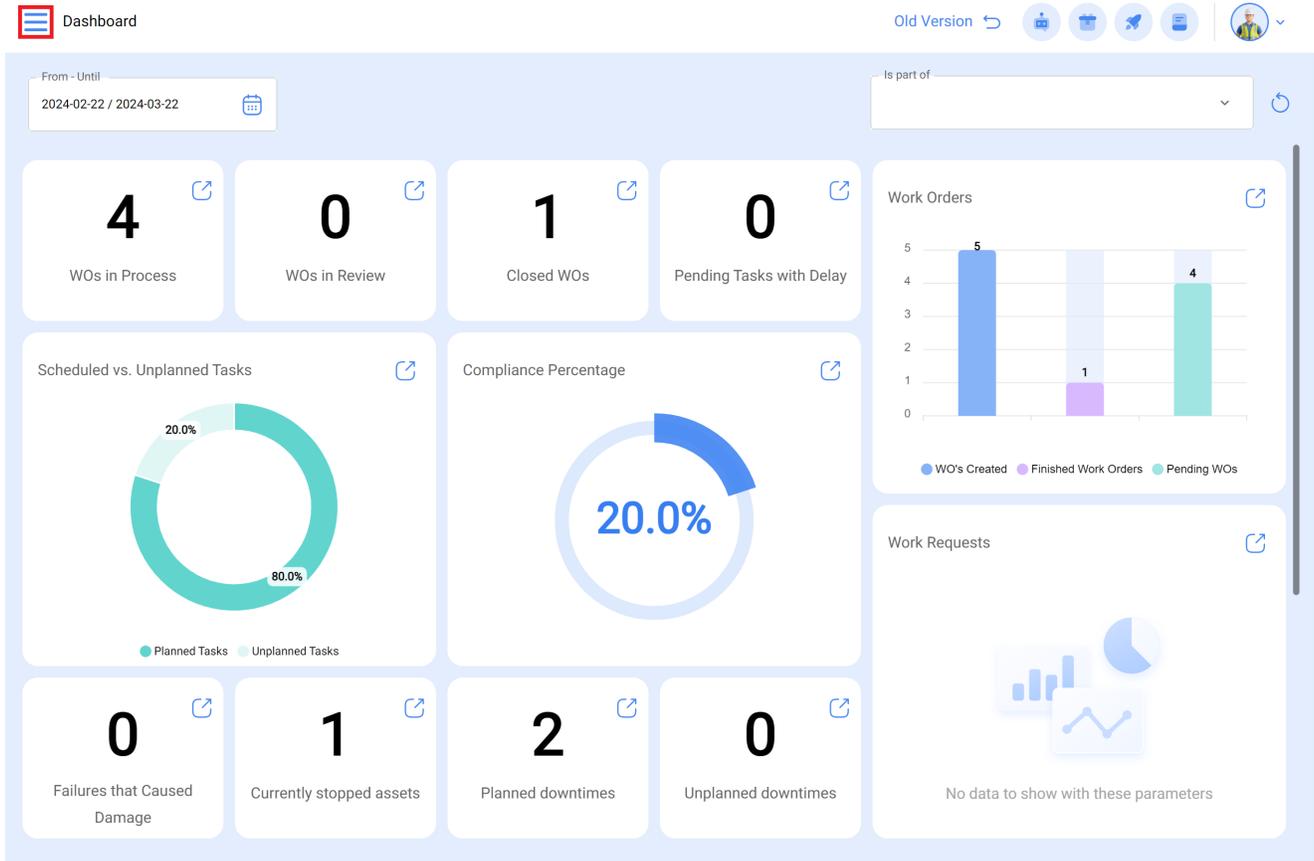
The image shows a software interface for a Dispatcher. The main window is titled "Dispatcher" and displays a "New Work Request" form. The form includes a toggle switch for "Enabled" (which is turned on), an "Information" section with a warning "You have pending changes to save!", and a "Details" section with tabs for "General", "Terms", and "Actions". On the right side, a modal window titled "Add Action" is open, containing three dropdown menus: "Action" (set to "Generate Work Order with:"), "Type of employee" (set to "Inhouse Personnel"), and "Responsible" (set to "Responsible"). A fourth dropdown menu for "Task type" is also visible. A red box highlights the "Responsible" and "Task type" dropdowns. The bottom of the main window shows "Showing 1 of 1".



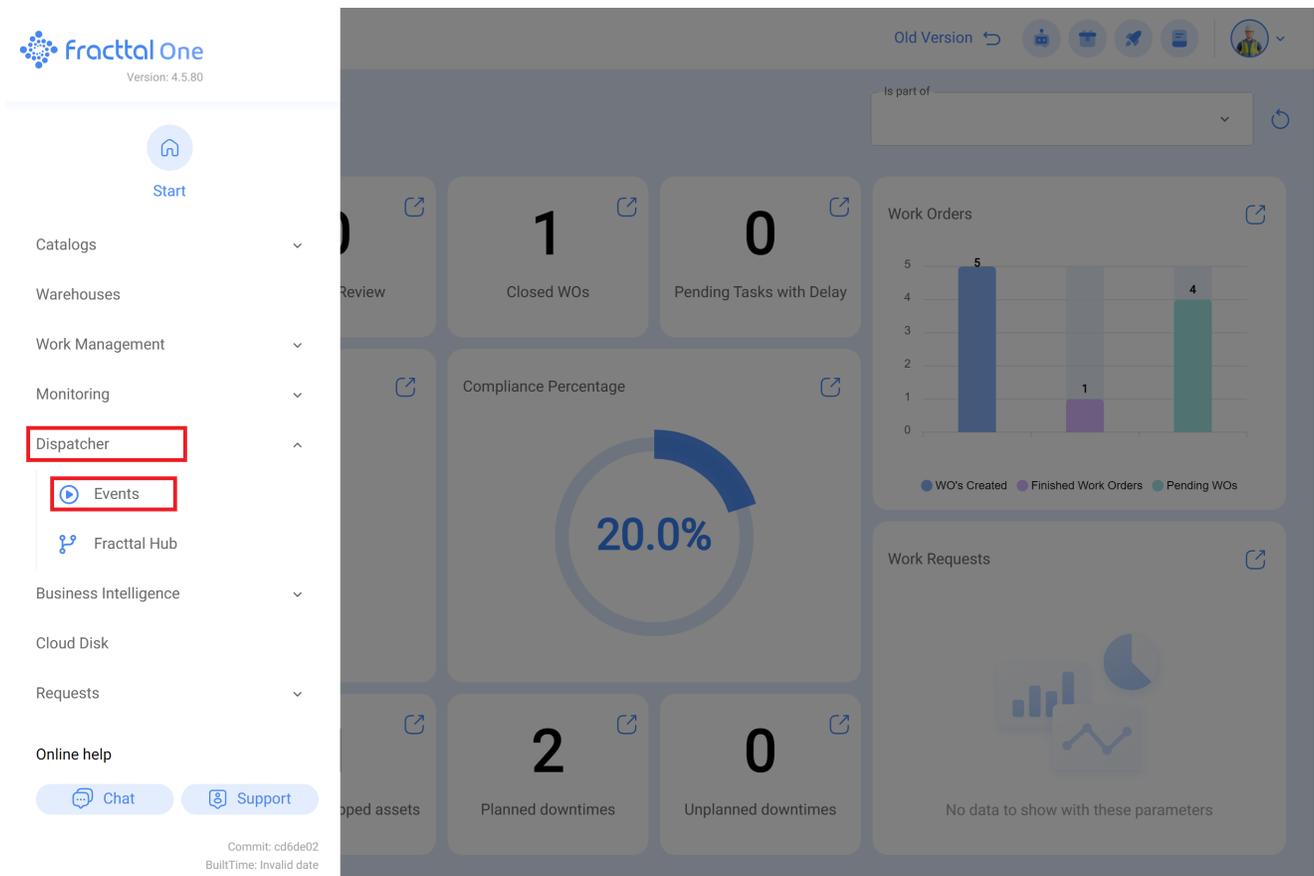
Click on save and return to the main list. You'll see the rule used to automatically generate Work Orders that come from a new request.

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.

The screenshot shows the Dispatcher interface. At the top left, there is a menu icon and the text "Dispatcher". To the right is a search bar with "Search..." and a "Old Version" link with a refresh icon. Further right are several utility icons: a plus sign, a calendar, a location pin, a document, and a user profile. Below this is a table with the following columns: Description, Module, Submodule, and Event. The table contains one row with the following data: Description: "Geração de OS Dionesio", Module: "Work Management", Submodule: "Pending Tasks", and Event: "Pending tasks or with delay". At the bottom left, it says "Showing 1 of 1". At the bottom right, there is a blue circular button with a white plus sign, which is highlighted with a red square.

	Description	Module	Submodule	Event
<input type="checkbox"/>	Geração de OS Dionesio	Work Management	Pending Tasks	Pending tasks or with delay

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

Enabled

Required Information

- Description can't be blank
- Module can't be blank
- Submodule can't be blank
- Event can't be blank

Details

- General
- Terms
- Actions

Module

Submodule

Event

Description

Description can't be blank

Save

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

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

←

Save

Enabled

Required Information

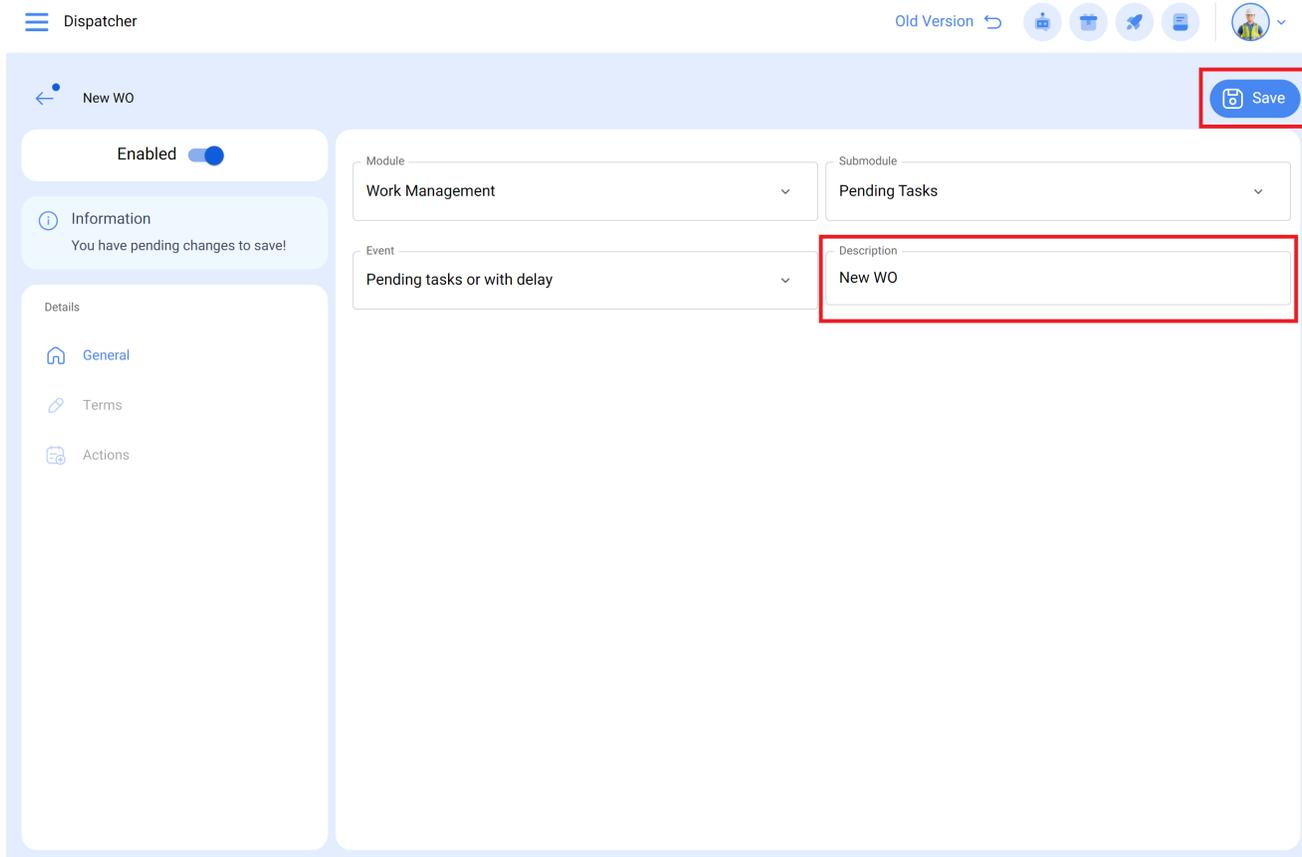
- Description can't be blank

Details

- General
- Terms
- Actions

Module Work Management	Submodule Pending Tasks
Event Pending tasks or with delay	Description <input type="text"/> <small>Description can't be blank</small>

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.

New WO Save

Enabled

Details

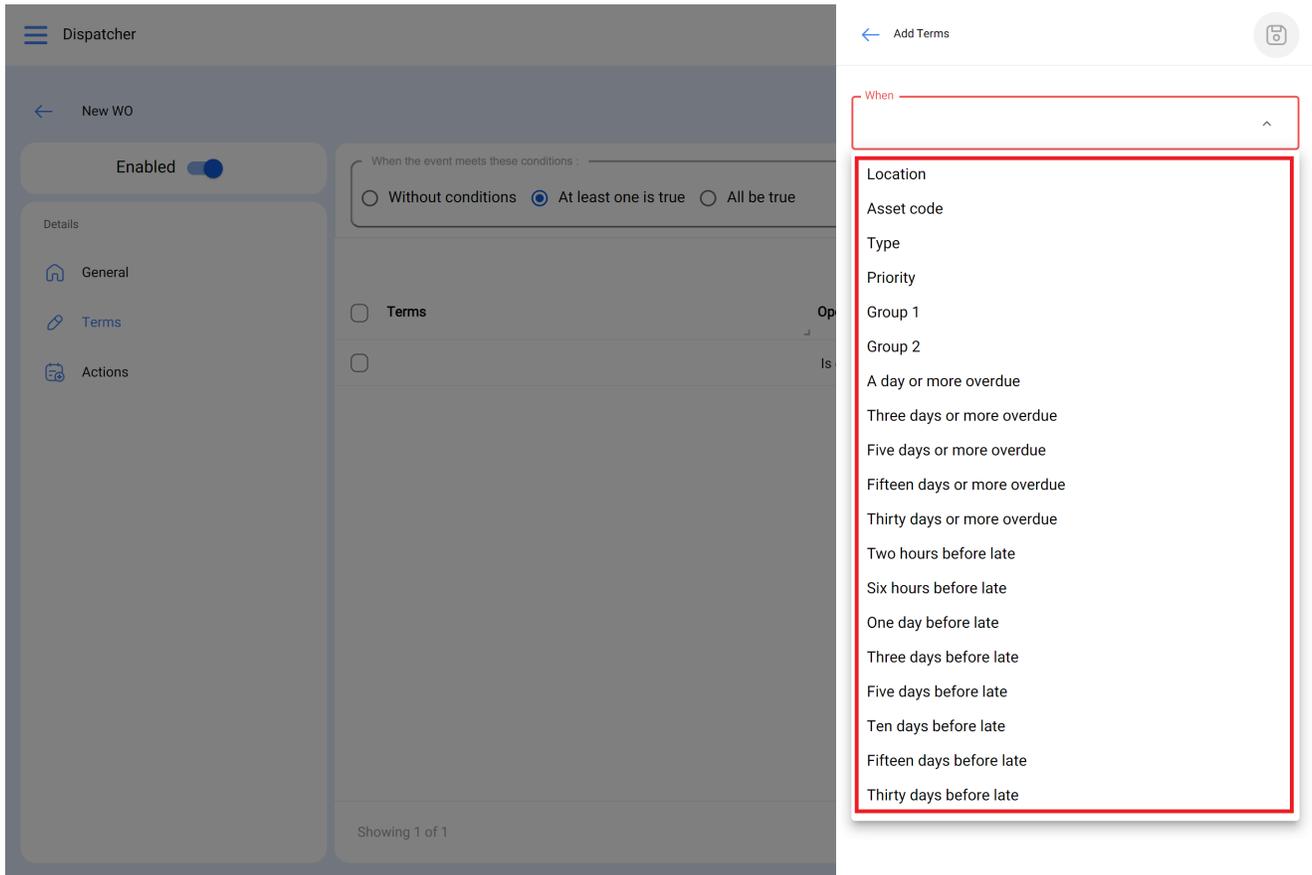
- General
- Terms**
- Actions

When the event meets these conditions : Without conditions At least one is true All be true

No data to show with these parameters

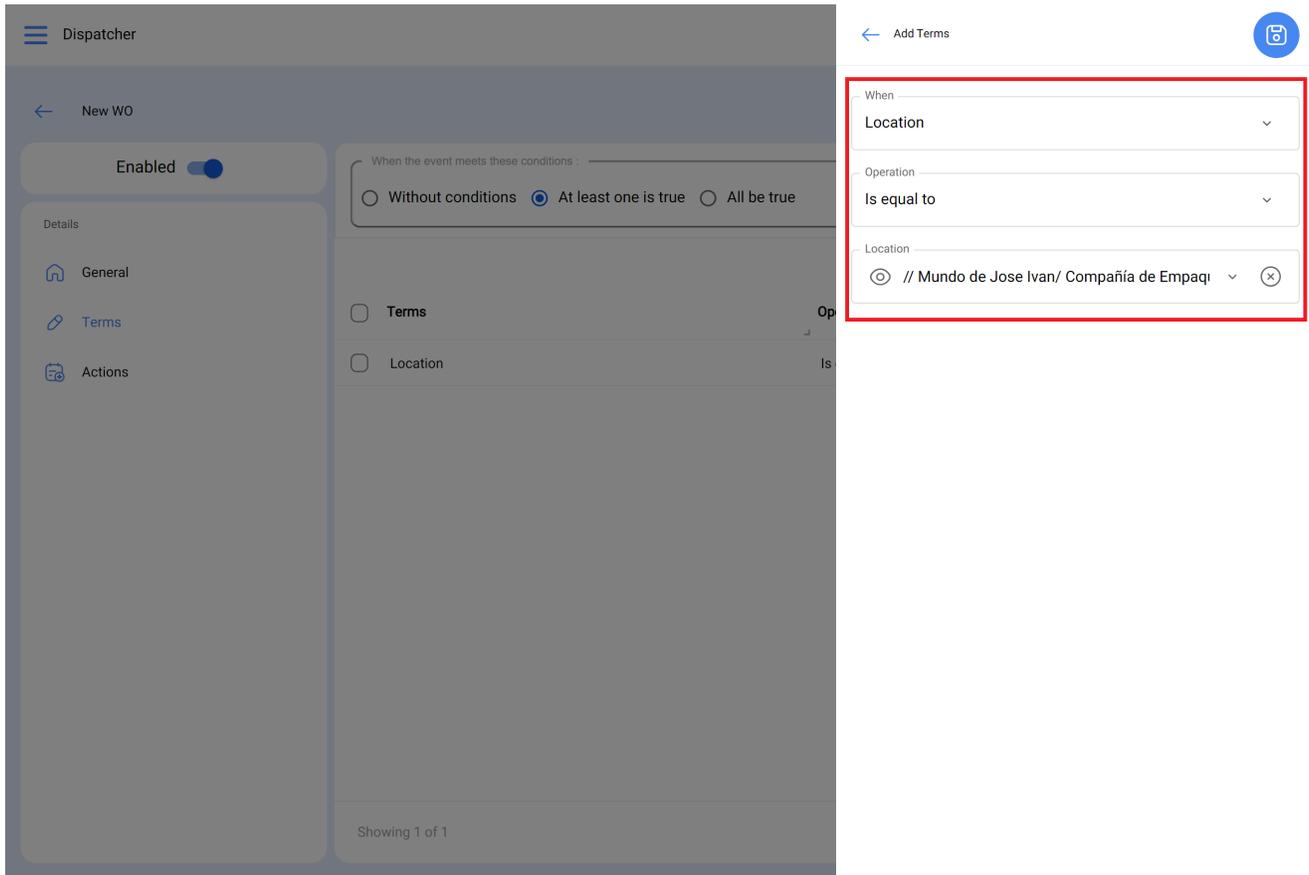
Showing 0 of 0 +

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.

← New WO
Save

Enabled

Details

- General
- Terms
- Actions

When the event meets these conditions :

Without conditions
 At least one is true
 All be true

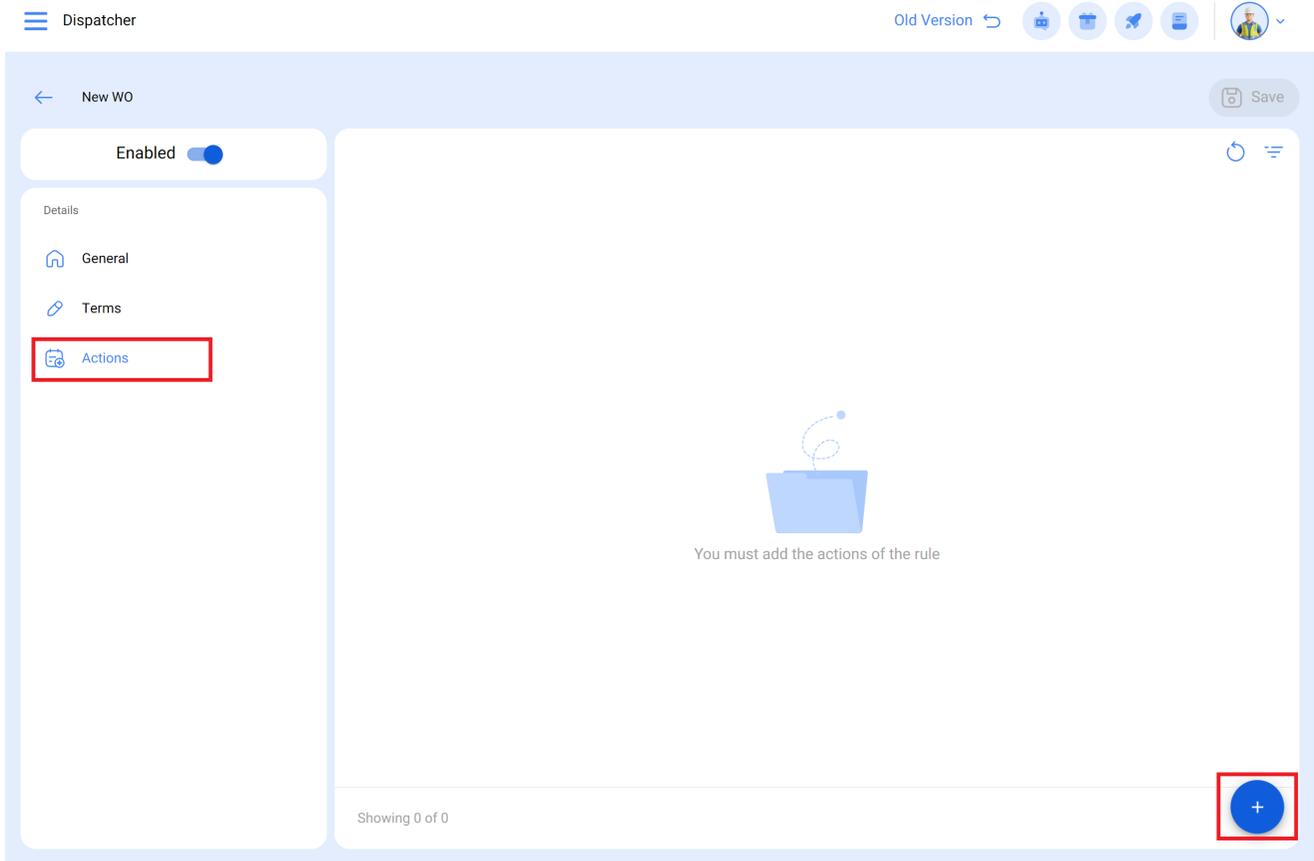
Take into account that the delay of a task is defined with respect to the calculated date

<input type="checkbox"/> Terms	Operation	Value
<input type="checkbox"/> A day or more overdue	Is equal to	
<input type="checkbox"/> Location	Is equal to	// Mundo de Jose Ivan/ Compañía de Empaques/ Planta Metál

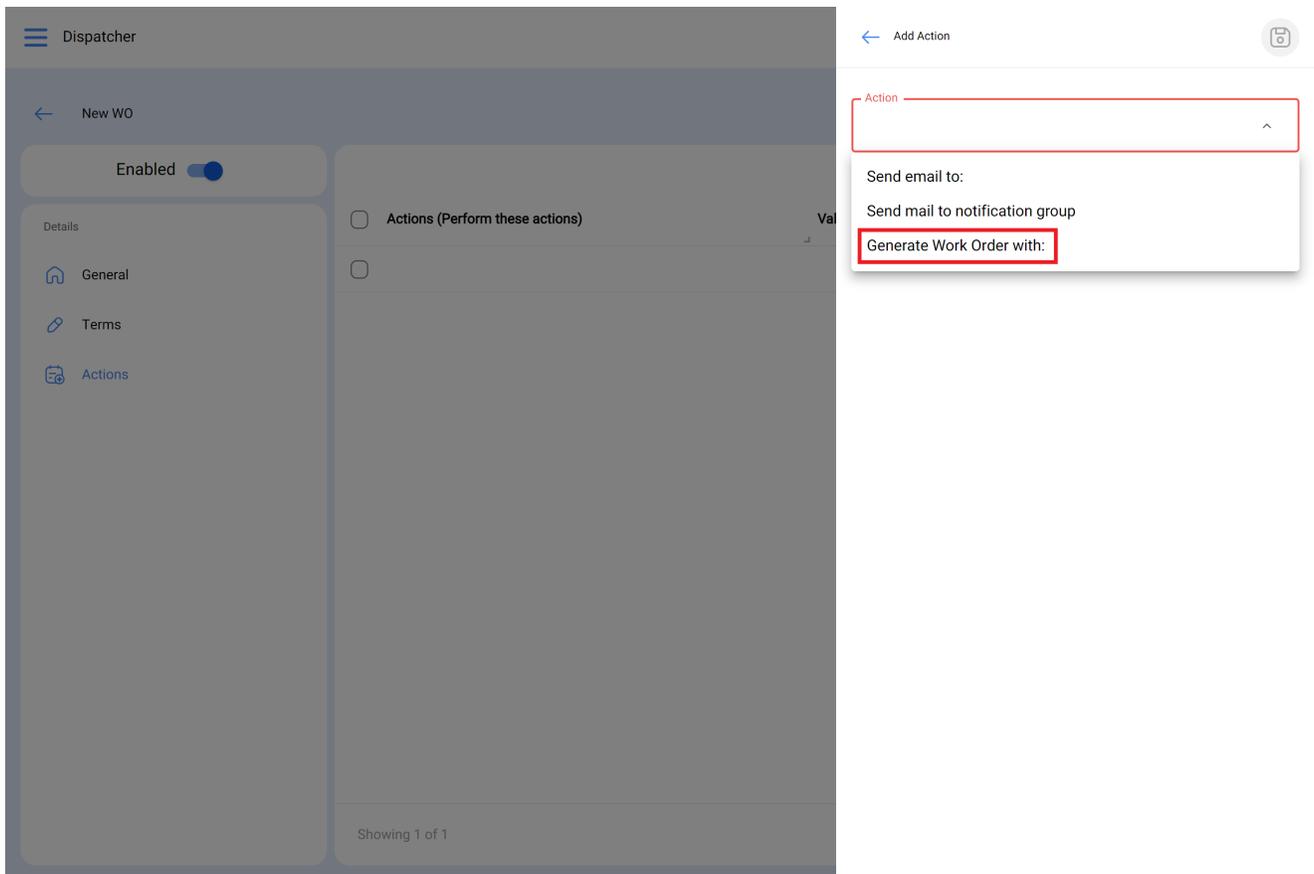
Showing 2 of 2 +

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.

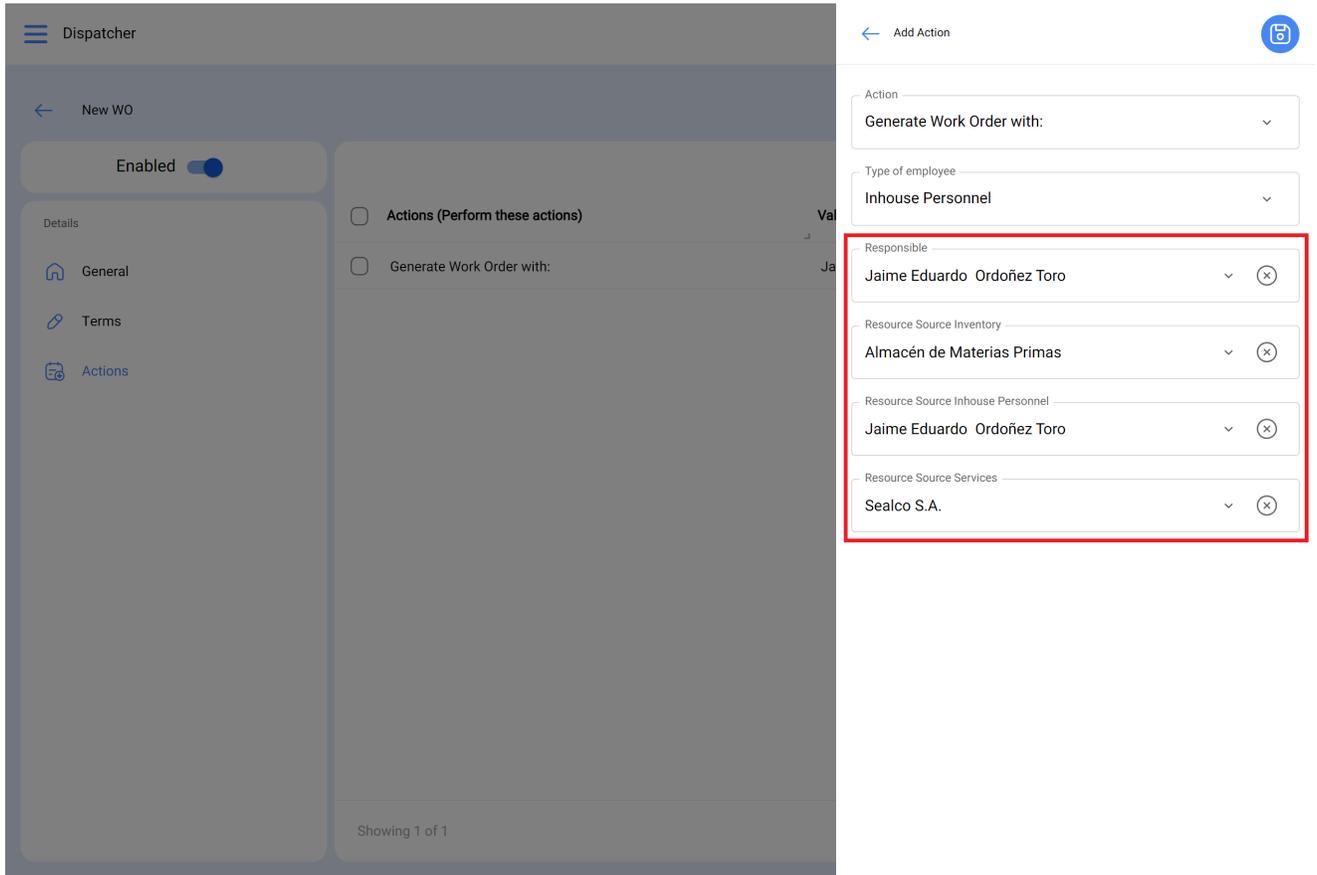


Here there are 3 actions to choose from. Select "Generate Work Order with:"



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.

The image shows a mobile application interface for a Dispatcher. The main screen is titled "New WO" and has a toggle switch set to "Enabled". On the left, there is a sidebar menu with options: "General", "Terms", and "Actions". The main content area shows a list of actions, with the first one selected: "Generate Work Order with:". To the right, a detailed view of this action is shown, titled "Edit Action". This view contains several dropdown menus: "Action" (set to "Generate Work Order with:"), "Type of employee" (set to "Inhouse Personnel"), and four resource source dropdowns: "Responsible", "Resource Source Inventory", "Resource Source Inhouse Personnel", and "Resource Source Services". These four resource source dropdowns are highlighted with a red rectangular box. At the bottom of the main screen, it says "Showing 1 of 1".



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.