

How to create a Planned WO (work order)?

help.fractal.com/hc/en-us/articles/24948048839693-How-to-create-a-Planned-WO-work-order

Generating a Work Order from the Kanban view:

Once a task plan has been established and linked to an asset, the tasks included in the said plan will appear as "Work Queues" (Note, work queue items are created by a scheduled date or event trigger, depending on the type of trigger linked to the task plan).

1. In the Kanban view, select the specific item or items from the work queue that you would like to generate as active planned work orders
2. Once selected, click the "+ New WO" button located at the top right-hand side of the screen

The screenshot displays the 'Work Management' interface in 'View Kanban' mode. At the top left, there is a navigation menu with 'Work Management' and 'View Kanban'. At the top right, there are user profile icons and a '+ New WO' button highlighted with a red box. The main area is divided into three columns: 'Pending Tasks' (166 items), 'WOs in Process' (2743 items), and 'WOs in Review' (215 items). Each column contains several task cards. In the 'Pending Tasks' column, two cards are highlighted with red boxes: one for 'Asset: PROCESO { PROC-01 }' with task 'EVALUACIÓN DE EQUIPO' and another for 'Asset: { Robus-2 } INOVA TP 924' with task 'FALLA DETECTADA'. The 'WOs in Process' column shows cards for 'OT-39-GR' (Asset: { EQ.ECV-00 } GENERADOR, Task: CAMBIAR PARABRISA) and 'OT-38-GR' (Asset: { AGRO-TRAC-001 } TRACTOR 1, Task: INSPECCION DE FUGAS). The 'WOs in Review' column shows cards for 'OT-35-GR' (Asset: { TRAC-ALEX-01 } TRACTOR ALEXANDER, Task: INSPECCION DE FUGAS) and 'OT-24-GR' (Asset: { COMP-01 } COMPRESOR RECIPROCANTE 01 ZHONGHE 250 KG, Task: No enciende máquina).

3. After clicking on "New WO" the system will open a window where all the necessary fields for the generation of said planned work order must be configured (these fields are described below).

Responsible * Actual Duration

Jonas Campos 000:20

Creation mode It depends on another WO?

All Tasks in one WO Select parent WO

Approve WO Budget

	Asset	Task	Task type	Actual Schedule Date	Planned Maintenance	Estimated Duration	Priority	Task Group 1	Task Group 2	Equipment downtime?
	PROCESO { PROC-01 }	EVALUACIÓN DE EQUIPO	ASISTENCIA	2025-03-26	PLAN DE MTTO EQUIPO DE BIOMEDICA	00D 00H 10mins	Very High			No
	{ Robus-2 } INOVA TP 924	FALLA DETECTADA	00 Correctivo	2025-03-25		00D 00H 10mins	Medium			No

Required field descriptions:

- **Responsible:** The person who will appear as responsible for the work order, the signature of this individual will appear on the printed work order.
- **Type of employee:** An option that establishes the type of person (In-house Personnel or Third Party) who will be responsible for the work order.
- **Estimated duration:** Refers to the estimated duration to carry out the tasks contained in the work order (it is the sum of the times of each task).
- **Creation mode:** An option that allows the user to establish if the selected tasks will all be included in a single work order, or if a work order will be generated per asset or per task.
- **It depends on another WO:** If the current work order is derived from or linked to another work order, select the parent work order function. An option that allows you to identify whether the generation of said work order is a consequence of a previous works order.
- **Approved by budget:** An option that allows for the establishing, creation and approval of a budget as mandatory so that the work order can be edited.

Generate New Work Order

Responsible * [] Actual Duration: 100:10

Creation mode: All Tasks in one WO

Approve WO Budget

	Asset	Task	Task type	Actual Schedule Date	Planned Maintenance
	Fractal { ACT.LOC-0001 }	Inspección día jueves	06 Preventivo	2025-03-26	
	Fractal { ACT.LOC-0001 }	Mantenimiento preventivo	06 Preventivo	2025-03-29	

Resources: Inspección día jueves

DETERGENTE { DET-001 }

Qty: 2

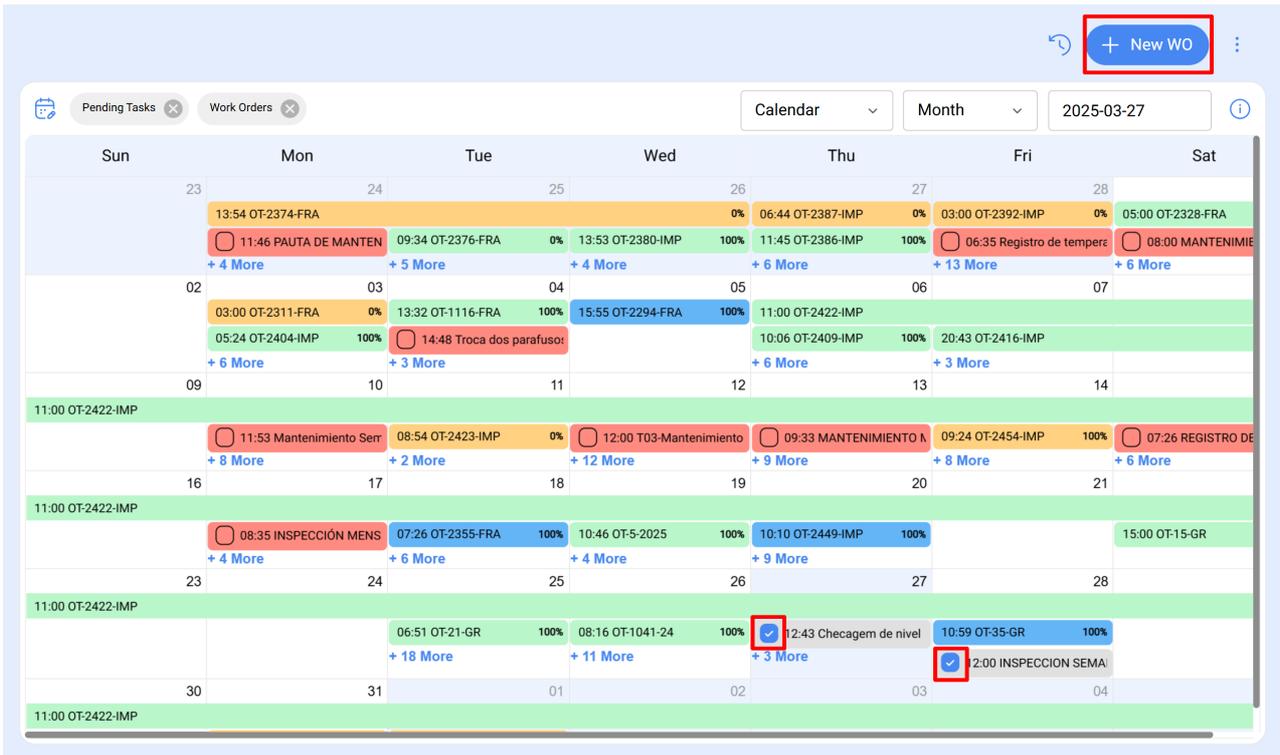
Source:

Unit Cost: \$ MXN 0,00

Generating a Work Order from the Calendar View:

To generate a work order from the Calendar view,

1. Click on the item in the calendar that has the pending task in question, this will enable the editing bar at the top of the window.
2. Click on the “Add New WO” button



3. In the Generate Work Order window, fill in the required options related to the work orders.

4. Finally, click the “Generate WO” button to create the work order.

← Generate New Work Order Generate WO

Responsible* Actual Duration

Jonas Campos
000:25

Creation mode It depends on another WO?

All Tasks in one WO
Select parent WO

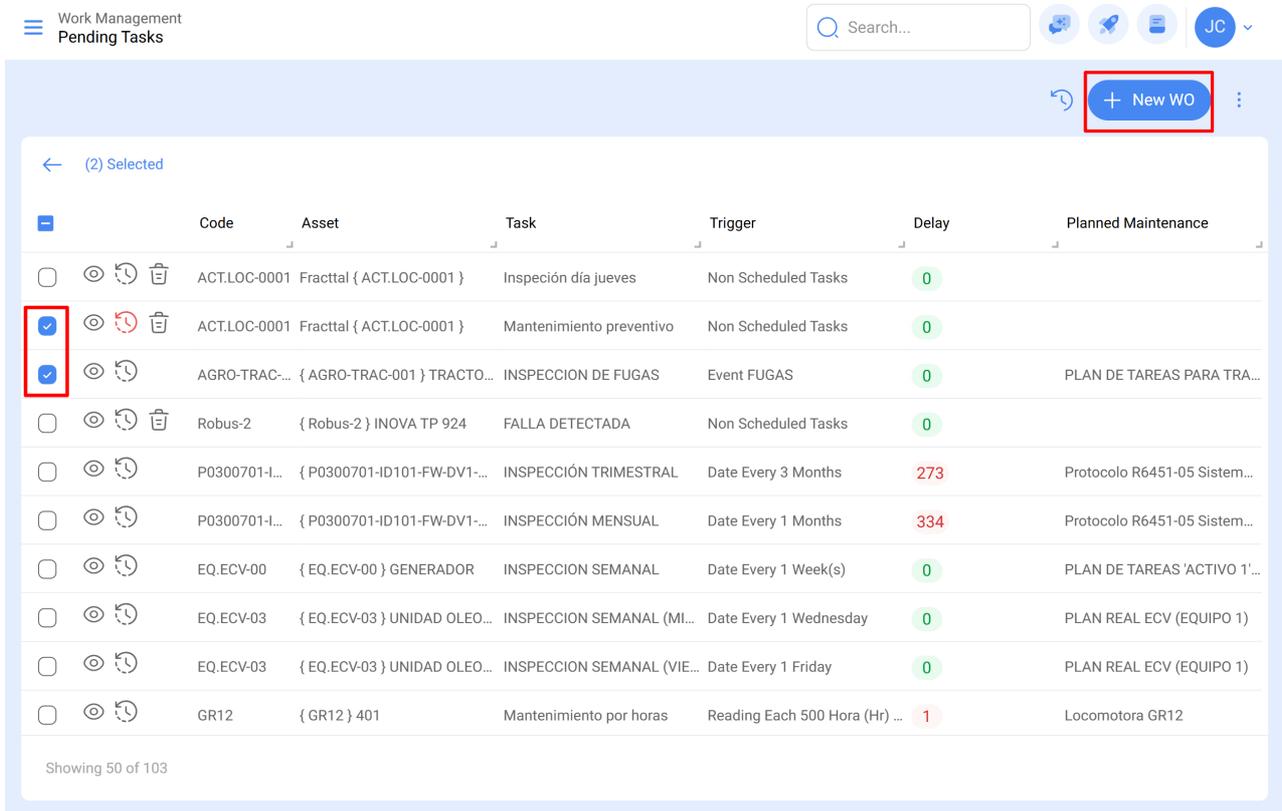
Approve WO Budget

	Asset	Task	Task type	Actual Schedule Date	Planned Maintenance	Estimated Duration	Priority	Task Group 1	Task Group 2	Equipment downtime?
	{ EQ.ECV-03 } UNIDAD OLEOHIDRAULICA	INSPECCION SEMANAL (VIERNES)	MANTENIMIENTO PREVENTIVO	2025-03-28	PLAN REAL ECV (EQUIPO 1)	00D 00H 10mins	Medium			No
	{ MQU-0009-MTX1-RC01 } Rolamento conico	Checagem de nivel	Inspeção	2025-03-27	Plano de lubrificação Hino - compressores atlas copco	00D 00H 15mins	Medium	Lubrificação		No

Generating a Work Order from Work Queues in the List View:

To generate a work order from the Work Queues in the List View,

1. In the List View, select the specific work queues from the list that you would like to generate as active work orders
2. Once selected, click the “+ New WO” button located at the top right-hand side of the screen



The screenshot shows the 'Work Management Pending Tasks' interface. At the top right, there is a search bar and a '+ New WO' button highlighted with a red box. Below the header, a table lists various tasks. Two rows are selected, indicated by blue checkmarks in the leftmost column, which are also highlighted with a red box. The table columns are: Code, Asset, Task, Trigger, Delay, and Planned Maintenance.

	Code	Asset	Task	Trigger	Delay	Planned Maintenance
<input type="checkbox"/>	ACT.LOC-0001	Fractal { ACT.LOC-0001 }	Inspección día jueves	Non Scheduled Tasks	0	
<input checked="" type="checkbox"/>	ACT.LOC-0001	Fractal { ACT.LOC-0001 }	Mantenimiento preventivo	Non Scheduled Tasks	0	
<input checked="" type="checkbox"/>	AGRO-TRAC-...	{ AGRO-TRAC-001 } TRACTO...	INSPECCION DE FUGAS	Event FUGAS	0	PLAN DE TAREAS PARA TRA...
<input type="checkbox"/>	Robus-2	{ Robus-2 } INOVA TP 924	FALLA DETECTADA	Non Scheduled Tasks	0	
<input type="checkbox"/>	P0300701-I-...	{ P0300701-ID101-FW-DV1-...	INSPECCIÓN TRIMESTRAL	Date Every 3 Months	273	Protocolo R6451-05 Sistem...
<input type="checkbox"/>	P0300701-I-...	{ P0300701-ID101-FW-DV1-...	INSPECCIÓN MENSUAL	Date Every 1 Months	334	Protocolo R6451-05 Sistem...
<input type="checkbox"/>	EQ.ECV-00	{ EQ.ECV-00 } GENERADOR	INSPECCION SEMANAL	Date Every 1 Week(s)	0	PLAN DE TAREAS 'ACTIVO 1'...
<input type="checkbox"/>	EQ.ECV-03	{ EQ.ECV-03 } UNIDAD OLEO...	INSPECCION SEMANAL (MI...	Date Every 1 Wednesday	0	PLAN REAL ECV (EQUIPO 1)
<input type="checkbox"/>	EQ.ECV-03	{ EQ.ECV-03 } UNIDAD OLEO...	INSPECCION SEMANAL (VIE...	Date Every 1 Friday	0	PLAN REAL ECV (EQUIPO 1)
<input type="checkbox"/>	GR12	{ GR12 } 401	Mantenimiento por horas	Reading Each 500 Hora (Hr) ...	1	Locomotora GR12

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3. In the Generate New Work Order window, fill in the required fields.

4. When all the required field are completed, click the “Generate WO” button to create the work order.

Responsible * Actual Duration

Creation mode It depends on another WO?

Approve WO Budget

	Asset	Task	Task type	Actual Schedule Date	Planned Maintenance	Estimated Duration	Priority	Task Group 1	Task Group 2	Equipment downtime?
	 Fractal (ACT.LOC-0001)	Mantenimiento preventivo	06 Preventivo	2025-03-29		04D 04H 00mins	Low	04 Operador sin unidad	2022-2023 Mantenimiento Mayor	No
	{ AGRO-TRAC-001 } TRACTOR 1	INSPECCION DE FUGAS	06 Preventivo	2025-03-26	PLAN DE TAREAS PARA TRACTORES MODELO ALEXANDER	00D 00H 10mins	Medium			No