# How to Edit and Complete a Work Order?

help2.fracttal.com/hc/en-us/articles/24891461518861-How-to-Edit-and-Complete-a-Work-Order

To edit or complete a Work Order (WO), you can access any of the views associated with the Work Orders module (Kanban view, Timeline, and List). In this case, once the WO is generated, you simply need to click on the respective WO (or task, if in List view) to initiate the editing process.

For the Kanban view:

By selecting a WO and clicking on it, a new window will be opened, displaying general information about the WO, along with the tasks included in that specific WO.

Let's identify the various options available in this view once we've clicked on a task in progress

1. **Assigned Technician's Name:** In this section, the name of the technician responsible for the Work Order (WO) is displayed.

2. **Estimated Total Duration:** Represents the estimated downtime of the asset. In the case of multiple tasks with specific durations, the system adds up these times, providing a cumulative total.

3. **Scheduled Date:** Shows the planned date for task execution. To initiate and complete the WO, you must click on the desired task.

4. **Work Order Consecutive with Prefix and Suffix:** Here, the unique consecutive number of the work order is presented, along with its previously configured prefix and suffix. This information specifically identifies the work order within the system.

5. **Save Button:** Allows you to save the changes made to the work order.

6. **Actual Execution Time:** Reflects the actual time spent by the technician to execute the task.

7. **Notes:** In this space, comments can be added for immediate viewing.

8. **Asset View:** Through this icon, access is granted to information about the asset that will be intervened or is currently being intervened.

9. **Activity Type:** Displays the type of activity that will take place.

10. **Task Information:** Provides details such as the task type, classification 1 and 2, request number (if applicable), scheduled date, and estimated duration.

11. **Resources:** Indicates the number of resources that will be or have been used in the work order.

12. **Attachments:** Shows the number of attached files included in the work order.

13. **Priority:** Indicates the priority level assigned to the task to be executed.

Note:

It's important to consider that each task is independent and has its own execution times, even if there are multiple tasks within the same Work Order (WO). This approach allows for individual traceability for each task in terms of time and resources used.
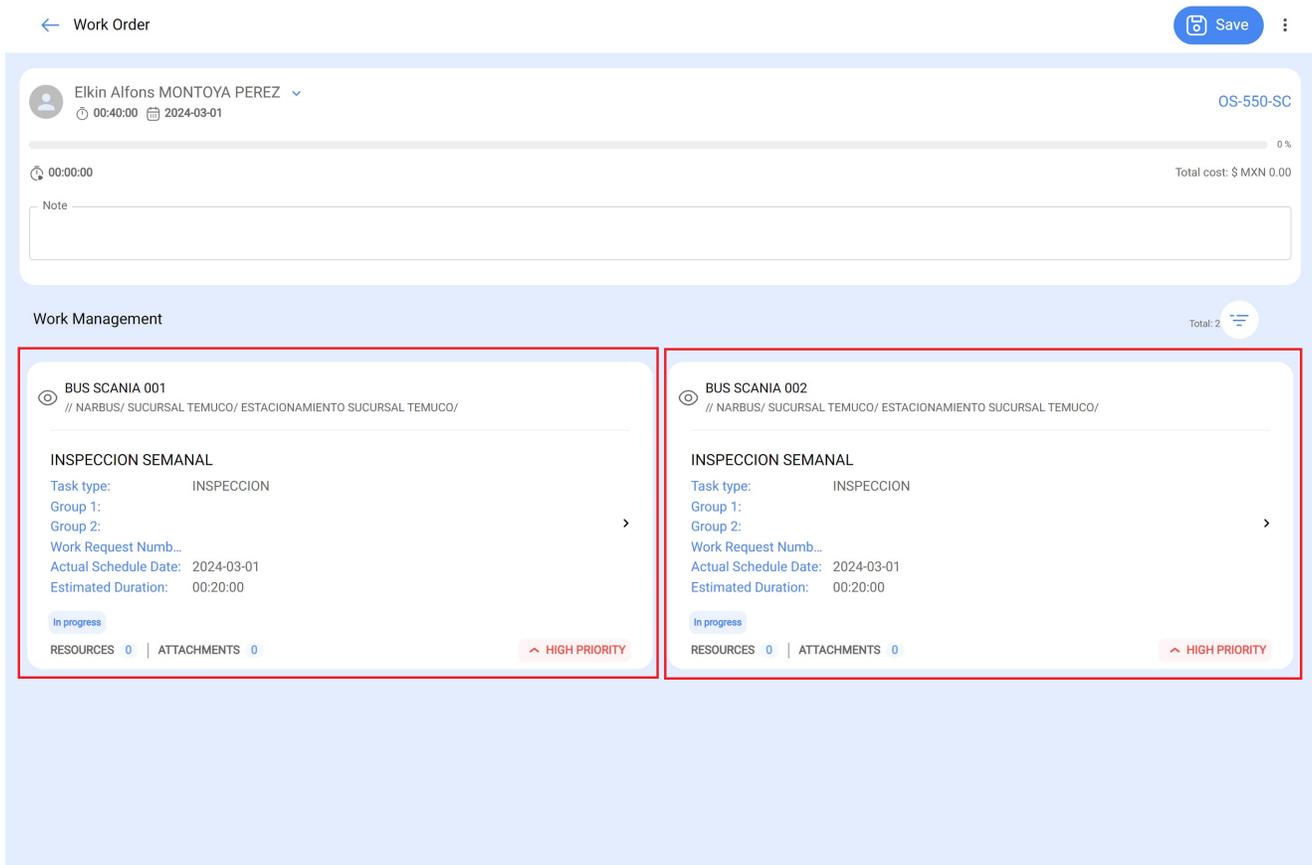
After entering the task, the system will open a window where each of the necessary requirements to execute the task can be completed. Below is a brief description of each editable field:
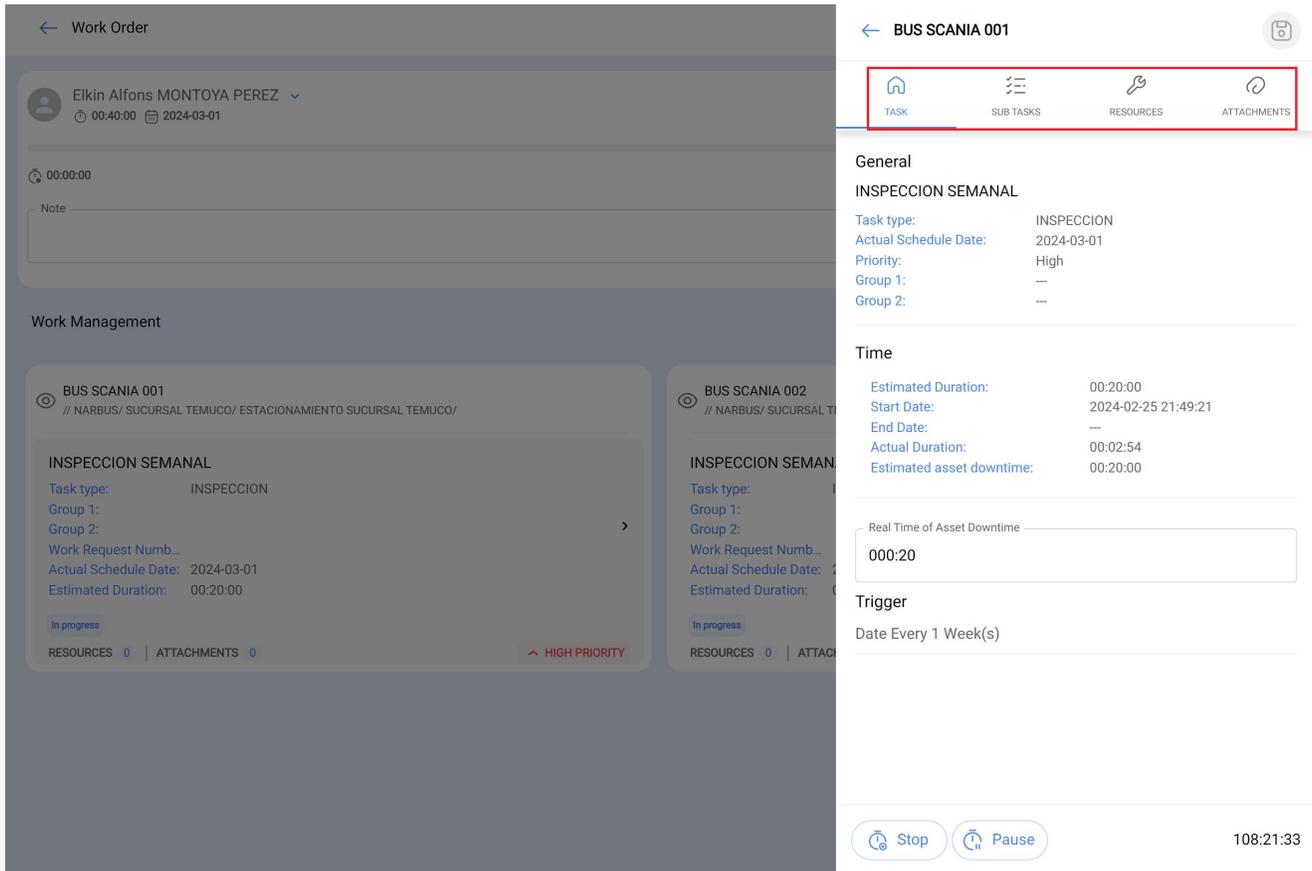
- **Task:** This section contains fundamental information about the task, including Type, Priority, and Classifications. It also provides insights into Timings (start and end times, execution time, etc.), along with details about the associated Trigger type.

- **Sub tasks :** In this tab, all steps or checklists essential for task completion are outlined. It serves as a comprehensive guide to ensure each aspect of the task is addressed thoroughly.

- **Resources :** Here, various resources, including Human Resources, Inventories, Services, etc., crucial for task execution and fulfillment, can be added and managed efficiently.

- **Attachments:** This section allows users to view attachments from a task plan. Additionally, it provides the capability to add new attachments, serving as evidence linked to the execution of the task.

Upon entering the "General" tab, the initial step is to commence the activity by clicking the "Start" button. This action triggers the recording of execution times, marking the official start of the task
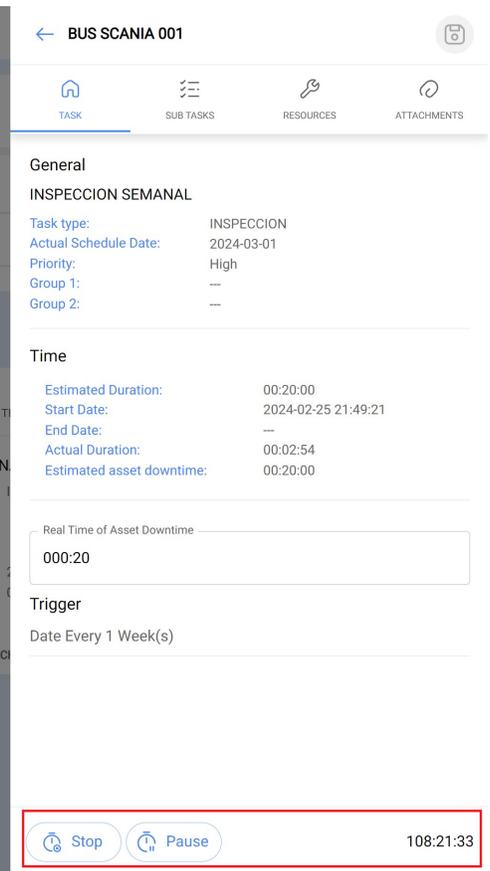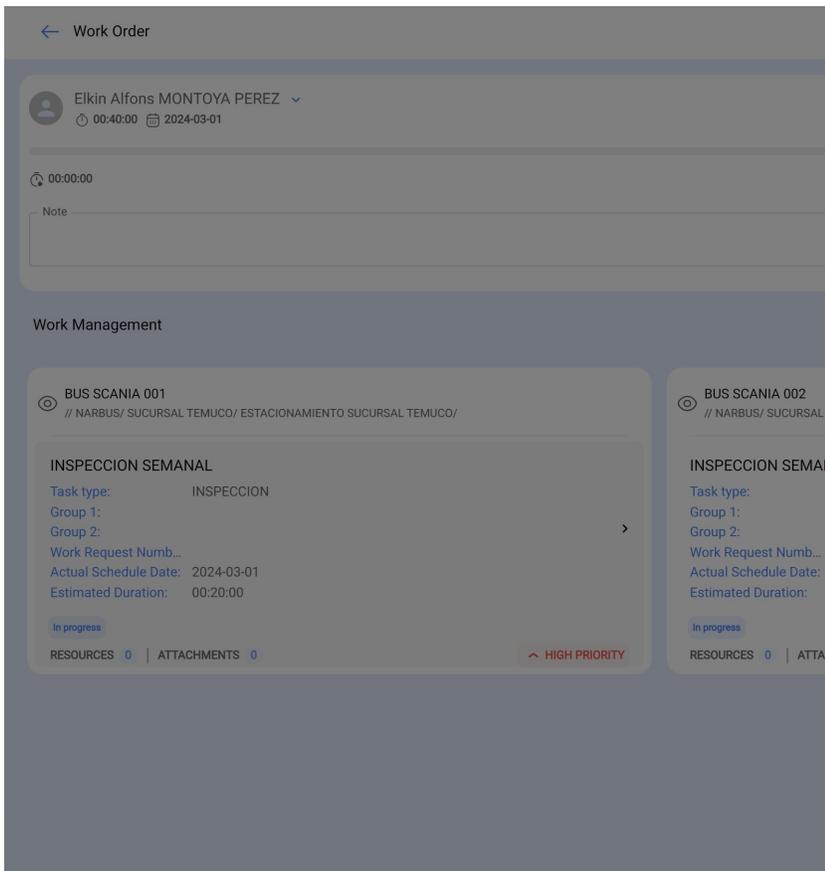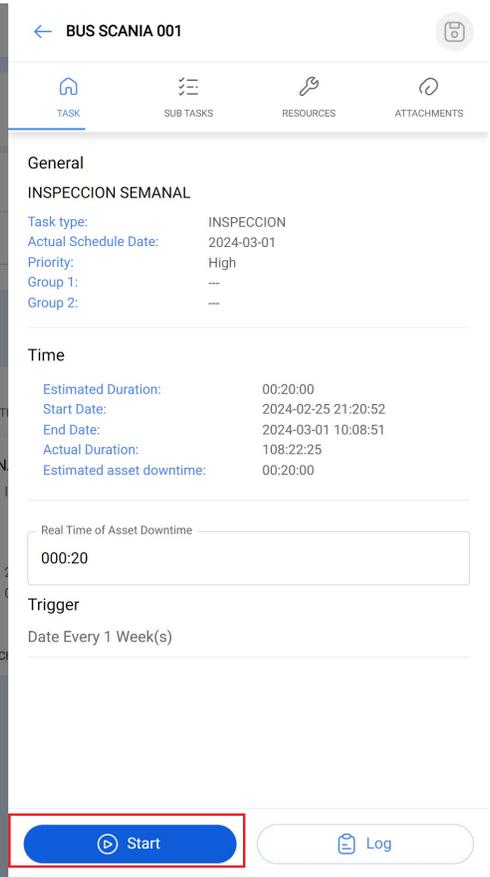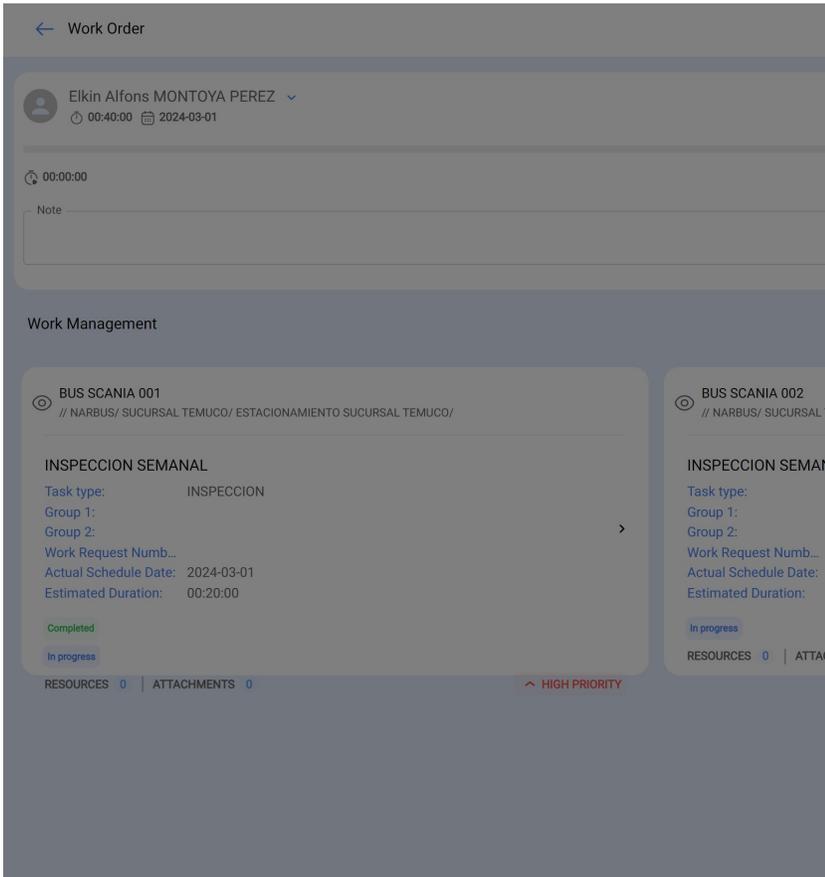
Upon initiating the task, the following options will be activated:

- **Stop:** This option corresponds to completing the task once all required fields are filled out, marking the task as concluded.

- **Pause:** This option allows recording effective working time, excluding intermediate breaks during task execution. Upon initiating a pause, a registration window will open, where the reason for the pause should be identified, along with a brief descriptive note. The activity can be resumed by clicking on the "Resume" option, and records associated with pauses can be viewed in the "Records" option.

Note: If there is a need to manually record time (without using the start and pause timer), you can access the "Records" button by following these steps:
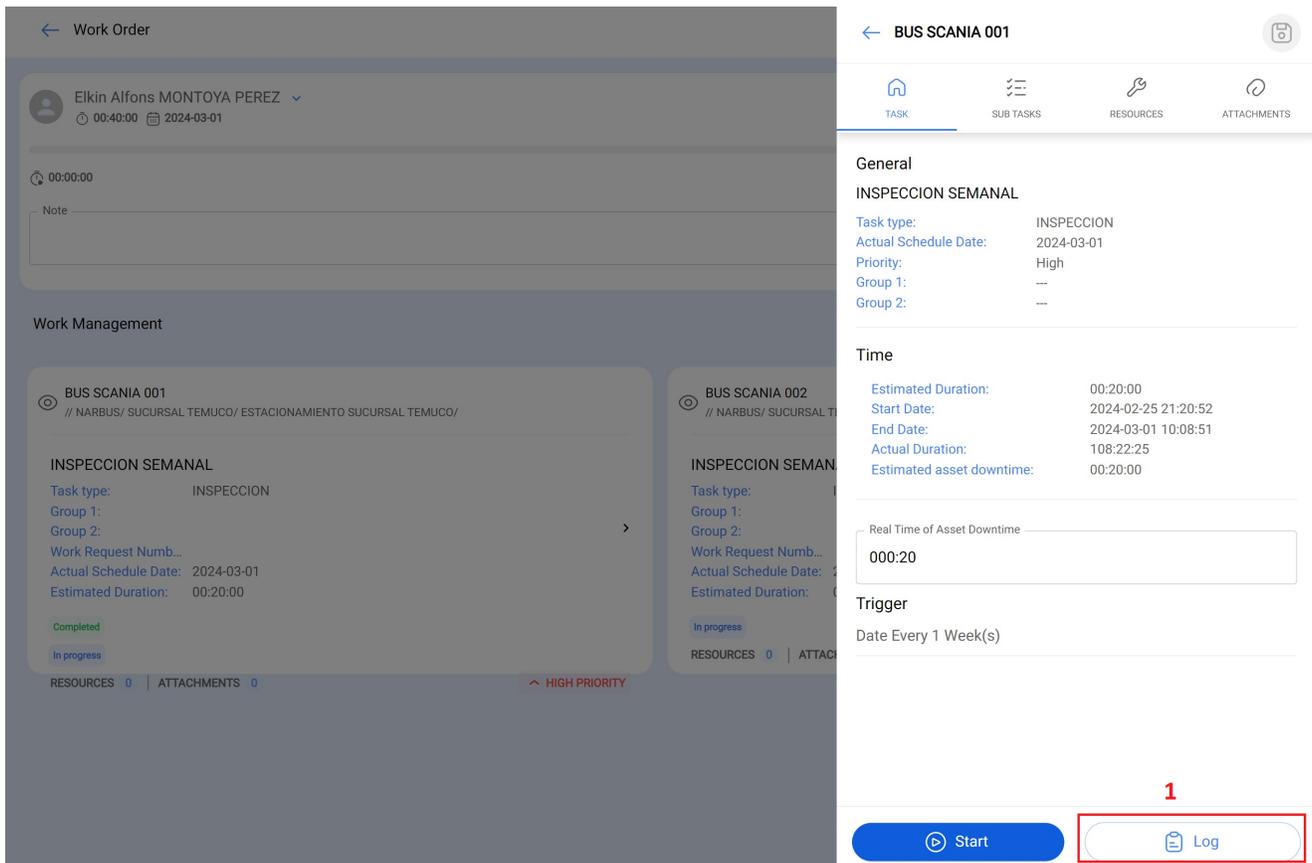
Work Order

← Work Order

Elkin Alfons MONTOYA PEREZ ⌄
⏱ 02:45:00 📅 2024-02-27

⏱ 00:00:00

Note

Work Management

AIRE ACONDICIONADO MINISPLIT
// SGX/ BARCELONA/ GERENTE BARCELONA/ RONDA UNIVERSIDAD/

MANTENIMIENTO TRIMESTRAL

Task type:	PREVENTIVO
Group 1:	GESTIÓN ELECTROMECÁNICA
Group 2:	REQUIERE PERMISO ALTURA
Work Request Numb...	
Actual Schedule Date:	2024-03-28
Estimated Duration:	02:00:00

RESOURCES 0 | ATTACHMENTS 1   ⌃ HIGH PRIORITY

Bomba presión de agu
// Arbol Tilbo/ Tilbo (AQU

MANTENIMIENTO CA

Task type:	
Group 1:	
Group 2:	
Work Request Numb...	
Actual Schedule Date:	
Estimated Duration:	

RESOURCES 0 | ATTAC

← **TASK: MANTENIMIENTO TRIMESTRAL**

↻ ≡

No data to show with these parameters

2

+

Showing 0 of 0

← **ADD TASK:** 💾

Task
MANTENIMIENTO TRIMESTRAL

User
Fabián Eliecer Montoya Fonnegra

Start Date
2024-03-01 10:31

End Date
2024-03-01 10:41

3

Subsequently, navigate to the "Subtasks" tab to complete each of the required steps or points in the execution of the task.
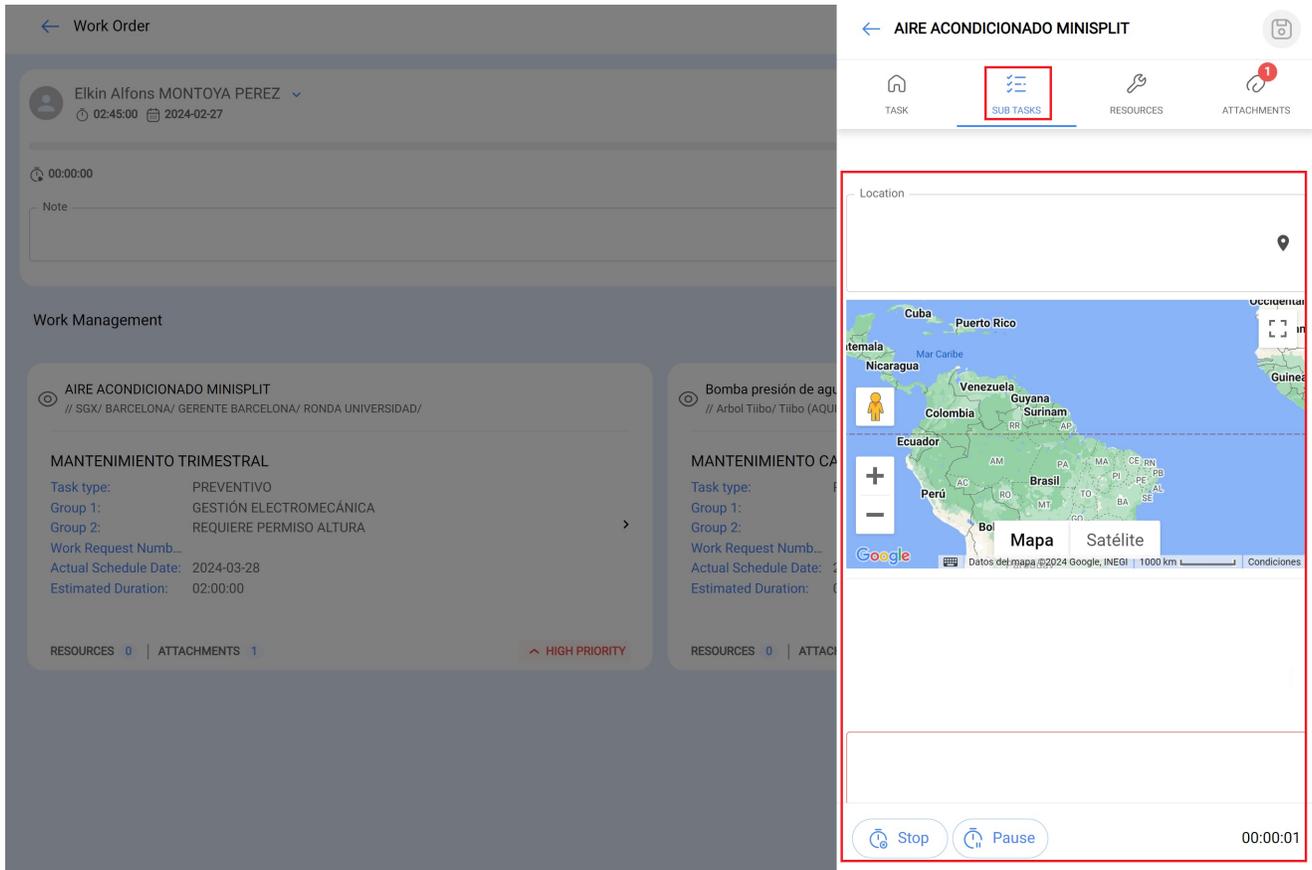
To add resources, navigate to the "Resources" tab and click on the add symbol located in the bottom right corner of the window.
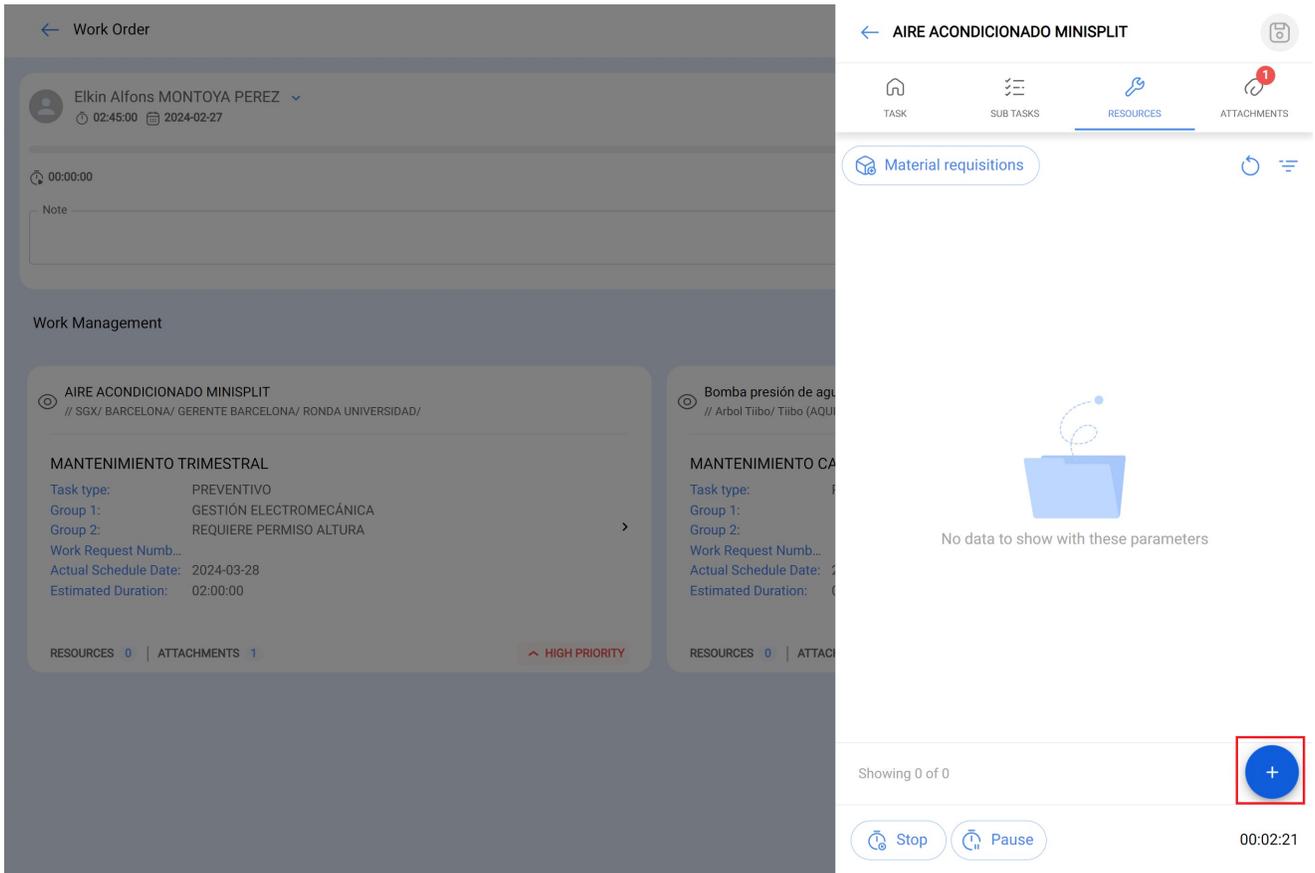
To add resources, navigate to the "Resources" tab and click on the add symbol located in the bottom right corner of the window.
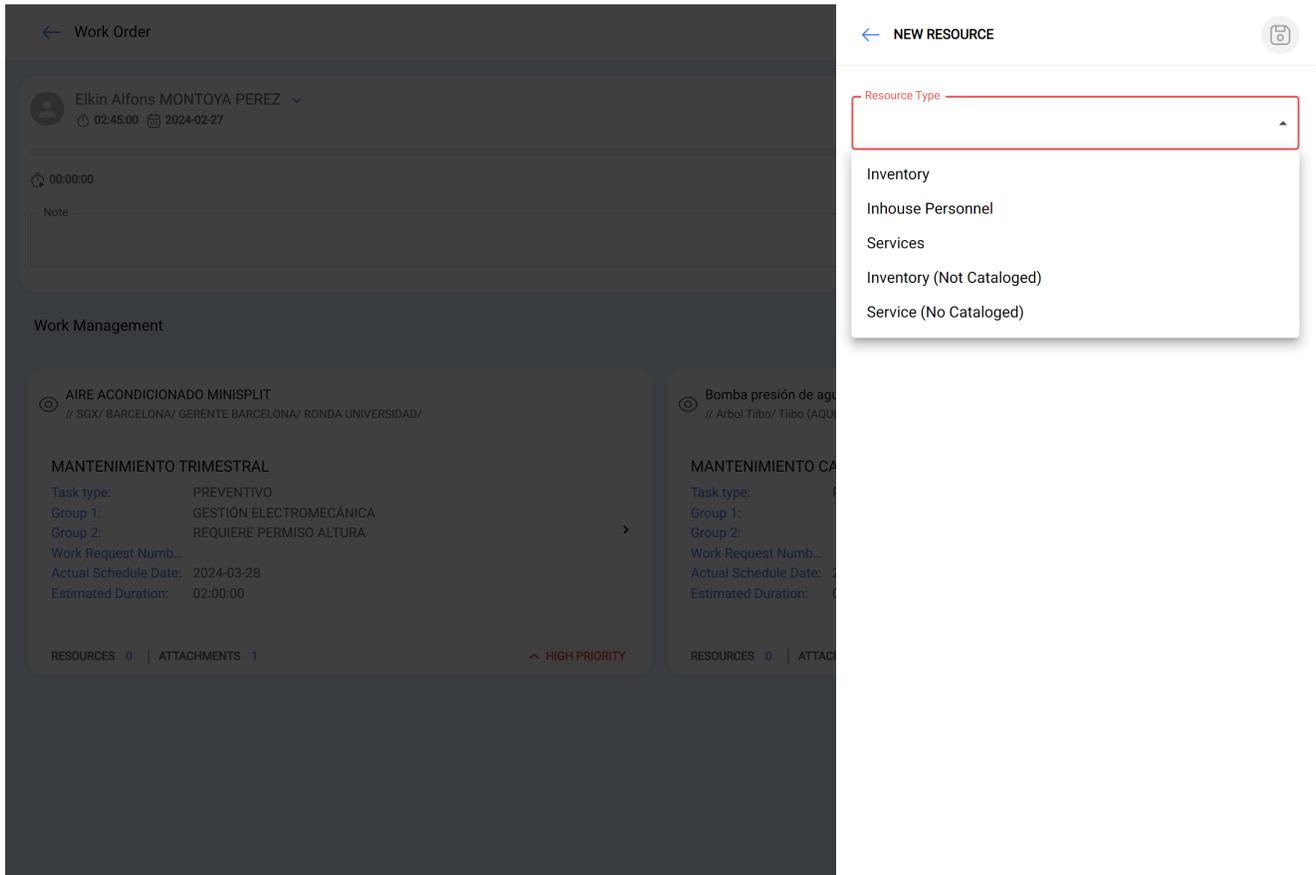
- **Inventory:** Corresponds to resources (Tools, Spare Parts, and Supplies) sourced from a warehouse that are necessary for task execution.

- **Inhouse Personnel:** Corresponds to man-hours that are intended to be accounted for in the Work Order (WO).

- **Services:** Corresponds to costs associated with external services provided by third parties registered in the platform (third-party module).

- **Inventory (No Cataloged):** Corresponds to inventory-type resources that do not originate from a warehouse and thus are not registered in the platform.

- **Service (No Cataloged):** Corresponds to services associated with an external entity not registered in the platform as a third party.

After selecting the resource type, it is necessary to fill in the remaining information, as illustrated in the image.
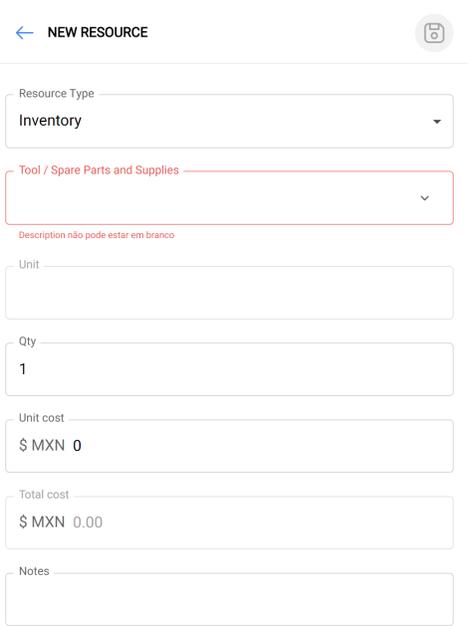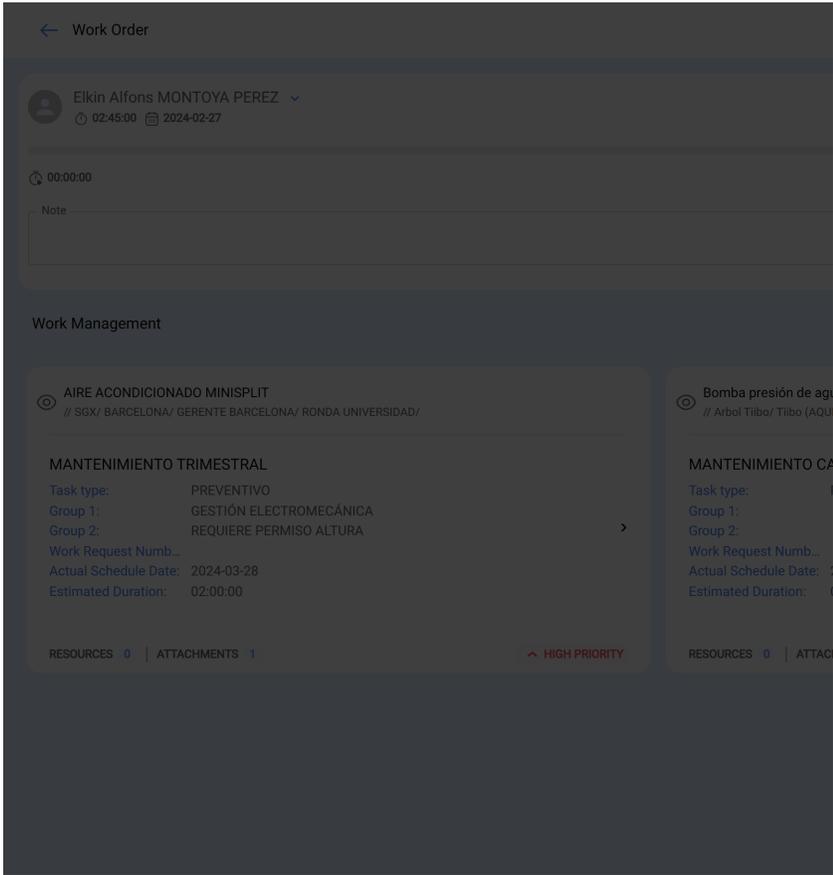
In the previous example, when choosing the inventory option, another category named "Tools/Spare Parts and Supplies" becomes available. This is because, based on the inventory registered in Fracttal One, a specific selection of the necessary items will be made.

Top-left panel

Work Order

Elkin Alfons MONTOYA PEREZ ∨
02:45:00 2024-02-27

00:00:00

Note

Work Management

AIRE ACONDICIONADO MINISPLIT
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MANTENIMIENTO TRIMESTRAL

Task type: PREVENTIVO
Group 1: GESTIÓN ELECTROMECÁNICA
Group 2: REQUIERE PERMISO ALTURA
Work Request Numb...
Actual Schedule Date: 2024-03-28
Estimated Duration: 02:00:00

RESOURCES 0 | ATTACHMENTS 1   HIGH PRIORITY

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// Arbol Tiibo/ Tiibo (AQU

MANTENIMIENTO CA
Task type:
Group 1:
Group 2:
Work Request Numb...
Actual Schedule Date:
Estimated Duration:

RESOURCES 0 | ATTAC

Top-right panel

← 🔍 Search by Assets

☐   ↺ ☰

☐ 🔧 DETERGENTE { DET-001 }
Type: Spare Parts
Code: DET-001
Priority:
Location: //

☐ 🔧 ACEITE 20 W 50 { ACE-001 } MOBIL
Type: Spare Parts
Code: ACE-001
Priority:
Location: // CERT. FRAC/ EMPRESA ENSAMBLADORA/ F

☐ 🔧 CABLE AWG 6 { CAB-0001 }
Type: Spare Parts
Code: CAB-0001
Priority:
Location: //

☐ 🔧 GRASA DE LITIO { GRL-001 }
Type: Spare Parts
Code: GRL-001
Priority:
Location: // CERT. FRAC/ EMPRESA ENSAMBLADORA/ F

☐ 🔧 ACEITE MINERAL GEAR OIL MOTORREDUCTORES { 0001010000100066 }
Type: Spare Parts
Code: 0001010000100066
Priority:
Location: //

Showing 25 of 1169

Bottom-right panel

← NEW RESOURCE   💾

Resource Type
Inventory   ▼

Tool / Spare Parts and Supplies
◎ DETERGENTE { DET-001 }   ⊗ ∨

Warehouse Resource Source
                                        ∨
Resource Source não pode estar em branco

Unit
LITROS

Qty
1

Unit cost
$ MXN 0

Total cost
$ MXN 0.00

Notes

12/20

Subsequently, it is necessary to specify the warehouse from which the necessary item will be extracted.

Lastly, specify the quantity of the items to be requested.
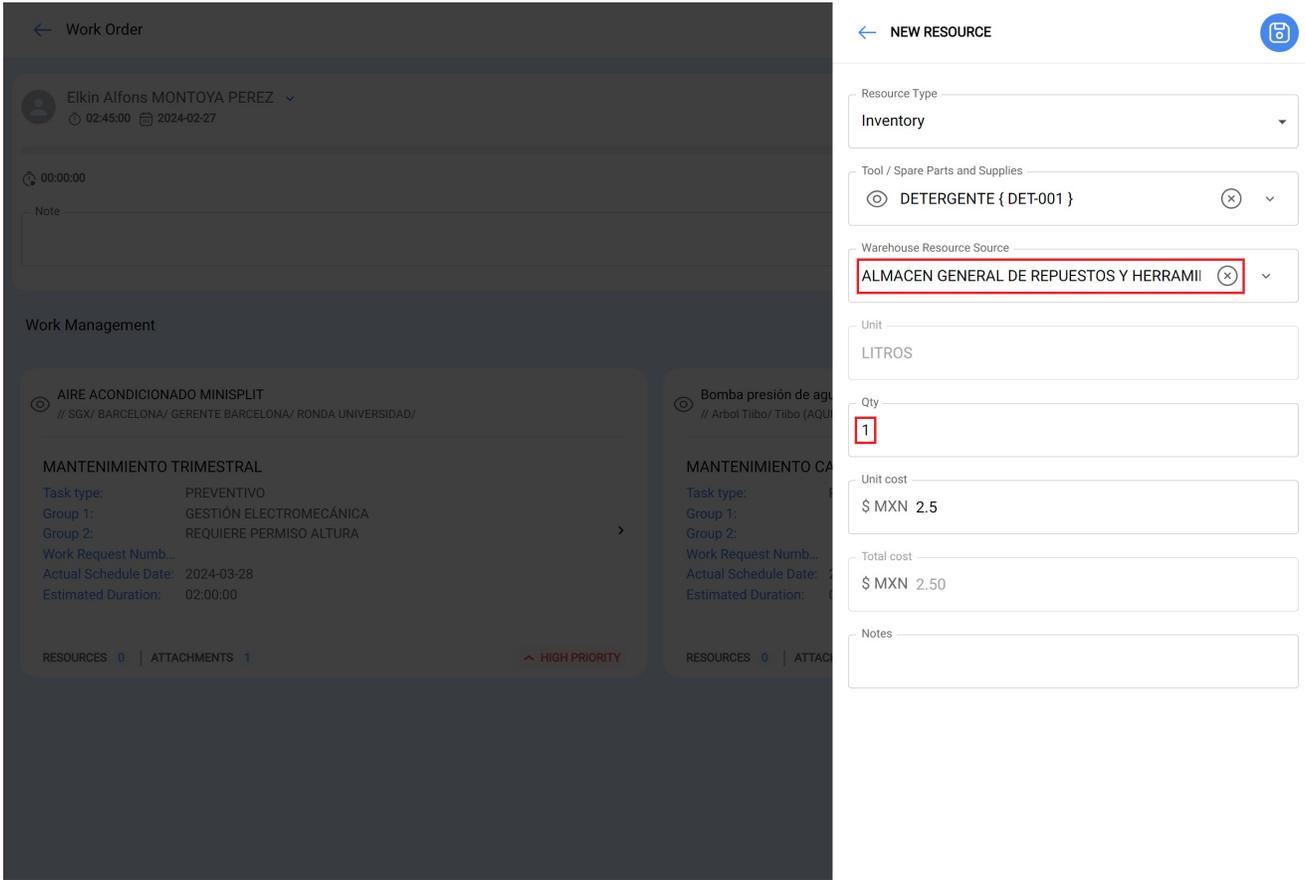
Note: All costs associated with cataloged inventories and services come directly from the Warehouses and Third-Party modules.

It is important to mention that when adding an inventory-type resource, a material requisition is automatically generated (both in the Work Order and in the Materials Requisition submodule in warehouses). This requisition serves as a validation document, ensuring that the material order originates from a work order.

Screen 1

← Work Order

Elkin Alfons MONTOYA PEREZ ▾
🕐 02:45:00 📅 2024-02-27

🕐 00:00:00

Note

Work Management

👁 AIRE ACONDICIONADO MINISPLIT
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MANTENIMIENTO TRIMESTRAL

Task type:	PREVENTIVO
Group 1:	GESTIÓN ELECTROMECÁNICA
Group 2:	REQUIERE PERMISO ALTURA
Work Request Numb...	
Actual Schedule Date:	2024-03-28
Estimated Duration:	02:00:00

RESOURCES 0 | ATTACHMENTS 1   ⌃ HIGH PRIORITY

👁 Bomba presión de agu
// Arbol Tiibo/ Tiibo (AQUI

MANTENIMIENTO CA

Task type:	
Group 1:	
Group 2:	
Work Request Numb...	
Actual Schedule Date:	
Estimated Duration:	

RESOURCES 0 | ATTAC

← AIRE ACONDICIONADO MINISPLIT   💾

🏠 TASK   ☰ SUB TASKS   🔧 RESOURCES ①   🔧 ATTACHMENTS

📦 Material requirements   ↺ ⇛

DETERGENTE { DET-001 }

Type:	Inventory
Source:	ALMACEN GENERAL DE REPUESTOS Y HERRAMIENTAS
Unit cost:	$ MXN 2.50
Total cost:	$ MXN 2.50
Creation Date:	2024-03-01 10:58:46
Qty:	1
Issued Qty:	0
Real Used Qty:	0

Showing 1 of 1   ⊕

🛑 Stop   ⏸ Pause   00:08:20

Screen 2

← Work Order

Elkin Alfons MONTOYA PEREZ ▾
🕐 02:45:00 📅 2024-02-27

🕐 00:00:00

Note

Work Management

👁 AIRE ACONDICIONADO MINISPLIT
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MANTENIMIENTO TRIMESTRAL

Task type:	PREVENTIVO
Group 1:	GESTIÓN ELECTROMECÁNICA
Group 2:	REQUIERE PERMISO ALTURA
Work Request Numb...	
Actual Schedule Date:	2024-03-28
Estimated Duration:	02:00:00

RESOURCES 0 | ATTACHMENTS 1   ⌃ HIGH PRIORITY

👁 Bomba presión de agu
// Arbol Tiibo/ Tiibo (AQUI

MANTENIMIENTO CA

Task type:	
Group 1:	
Group 2:	
Work Request Numb...	
Actual Schedule Date:	
Estimated Duration:	

RESOURCES 0 | ATTAC

← MATERIAL REQUISITIONS: MANTENIMIENTO TRI...

↺ ⇛

Warehouse: ALMACEN GENERAL DE REPUESTOS Y
HERRAMIENTAS (MOV168)

Responsible:	
Approved:	No
Status:	Not delivered

Showing 1 of 1

After generating the material requisition, the corresponding output should be carried out in the Warehouses module. In this scenario, the material requisition will change its status from "Not Delivered" to Total or Partial Delivery, depending on the circumstances.

Once the material has been delivered, the technician completing the Work Order (WO) must verify the actual quantity used. In the event of excess material, a return entry should be made to the warehouse to account for the surplus as a return.

## Work Order

Elkin Alfons MONTOYA PEREZ ⌄
🕐 02:45:00 📅 2024-02-27

🕐 00:00:00

Note

Work Management

◉ AIRE ACONDICIONADO MINISPLIT
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MANTENIMIENTO TRIMESTRAL

Task type:	PREVENTIVO
Group 1:	GESTIÓN ELECTROMECÁNICA
Group 2:	REQUIERE PERMISO ALTURA
Work Request Numb...	
Actual Schedule Date:	2024-03-28
Estimated Duration:	02:00:00

In progress

RESOURCES 3 | ATTACHMENTS 1   ⌃ HIGH PRIORITY

◉ Bomba presión de agu
// Arbol Tiibo/ Tiibo (AQUI

MANTENIMIENTO CA

Task type:	
Group 1:	
Group 2:	
Work Request Numb...	
Actual Schedule Date:	
Estimated Duration:	

RESOURCES 0 | ATTAC

← **AIRE ACONDICIONADO MINISPLIT**   💾

🏠 TASK	☰ SUB TASKS	🔧 ³ RESOURCES	🔧 ¹ ATTACHMENTS

📦 Material requisitions   ↻ ⇊

DETERGENTE { DET-001 }

Type:	Inventario
Source:	ALMACEN GENERAL DE REPUESTOS Y HERRAMIENTAS
Unit cost:	€ EUR 2,50
Total cost:	€ EUR 2,50
Creation Date:	2024-02-25 22:10:02
Qty:	1
Issued Qty:	0
Real Used Qty:	1

Showing 3 of 3   ⊕

🕐 Stop   ⏸ Pause   00:24:15

← **EDIT RESOURCE**

Resource Type
Inventory

Description
DETERGENTE { DET-001 }

Resource Source
ALMACEN GENERAL DE REPUESTOS Y HERRAMIENTAS

Unit
LITROS

Qty
1

Real Used Qty
1

Issued Qty
1

Unit cost
$ MXN 2.5

Total cost
$ MXN 2.5

Notes

✓ Action Done   ✕

Regarding the "Attachments" tab, its functionality is analogous. To view attachments associated with the task plan, simply navigate to this tab.
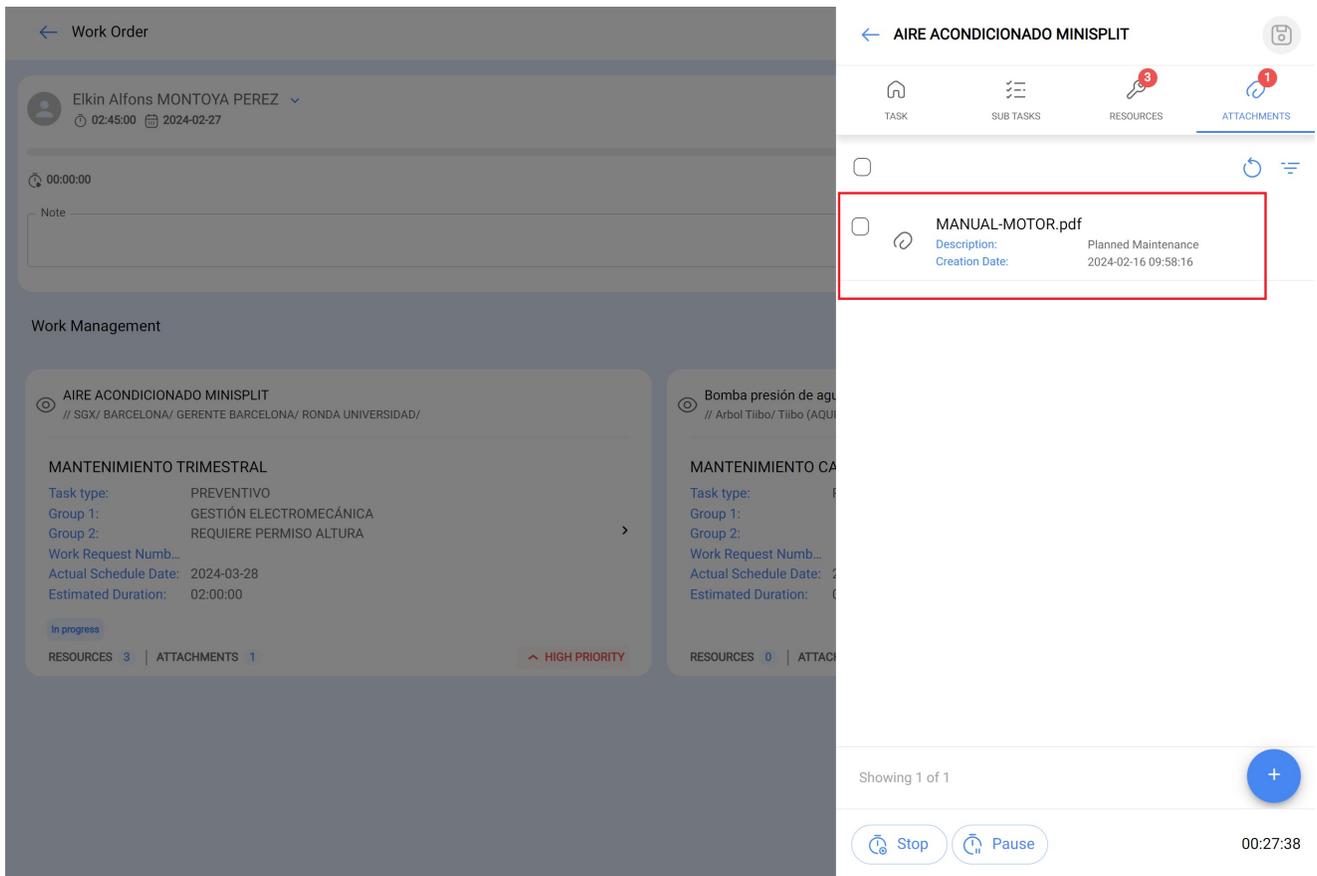

However, to add a new attachment, click on the "Add" link located at the bottom of the window. Then, select the type of attachment you wish to add.
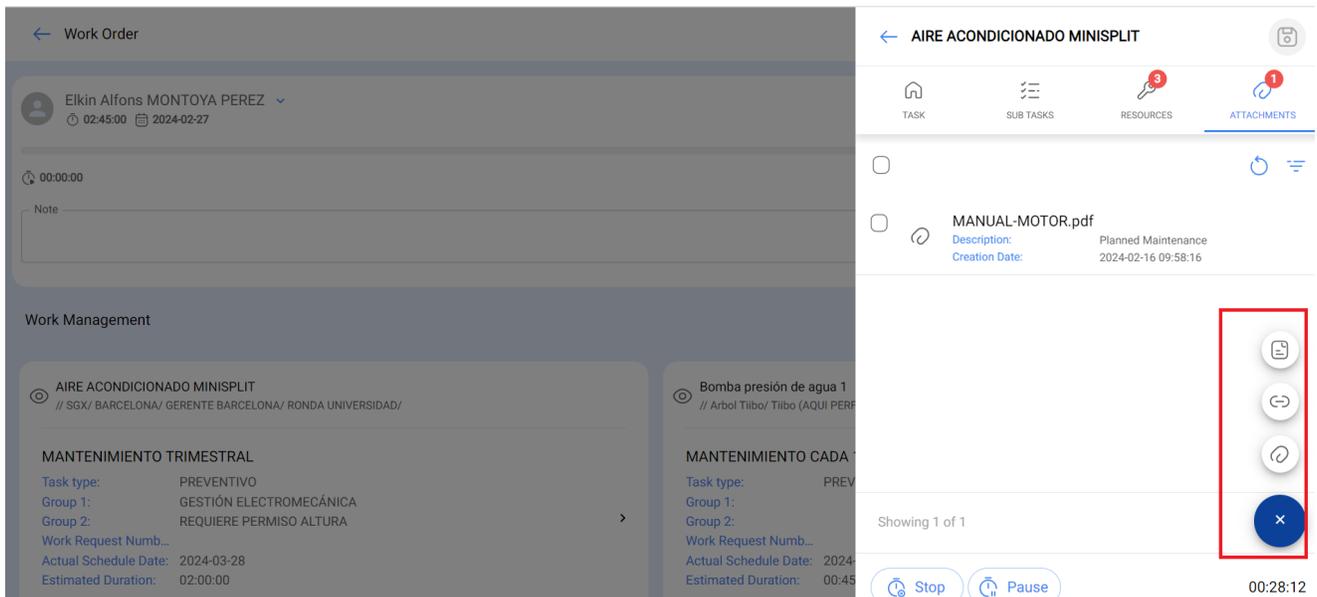

Attachment Types:

- **Note:** A text field where any notes related to the task can be added.

- **Link:** A text field where a hyperlink can be added.

- **File:** A field where files such as documents, images, etc., can be attached.

Finally, once the edits have been made and the information has been completed in each of the 4 tabs of the Work Order (Task, Subtasks, Resources, Attachments), simply click on the save option and then on the stop option to record the end of the task.
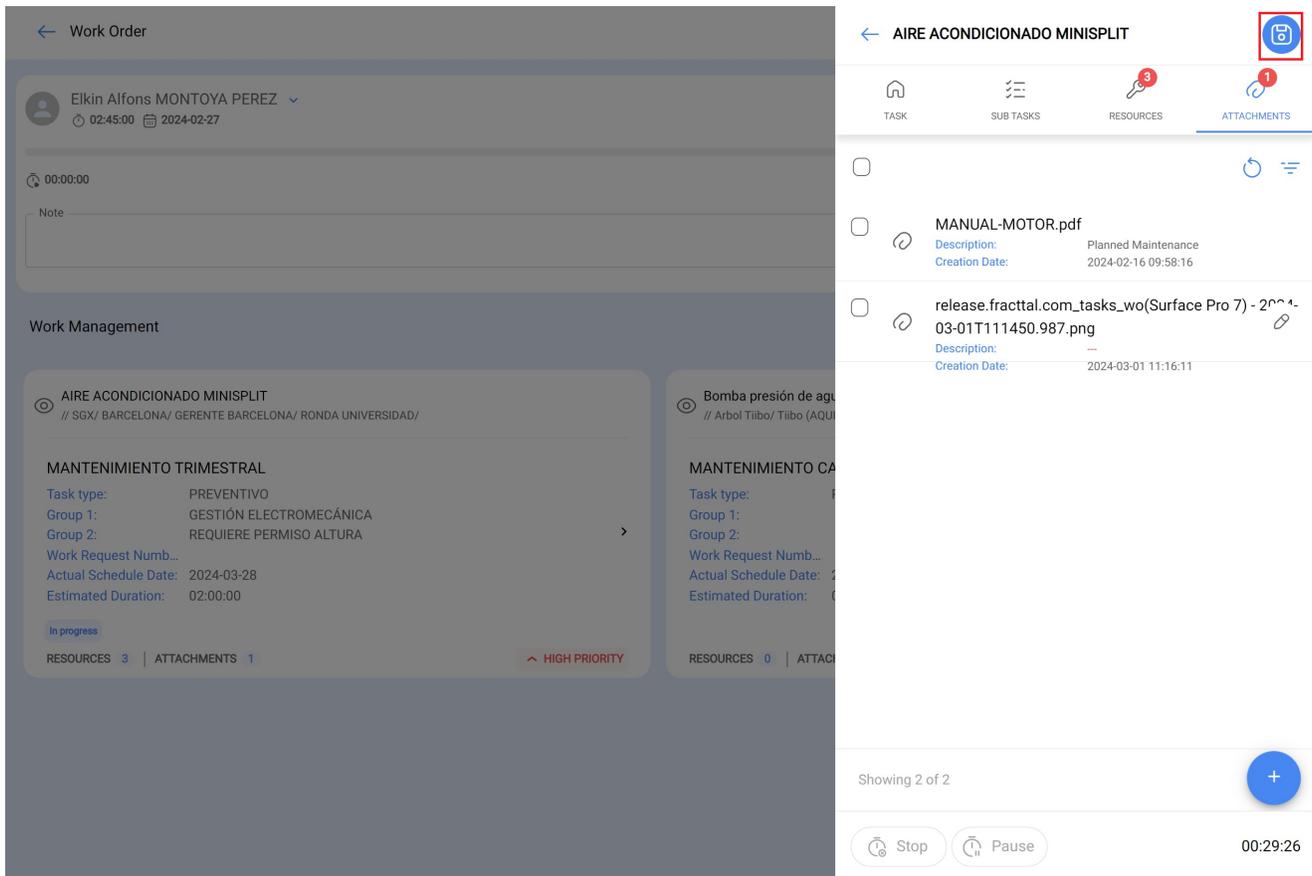
Complete a Work Order in Calendar View:

Upon entering the Calendar View tab, simply click on the respective Work Order (WO), and it redirects you to the work order. Follow the same steps outlined at the beginning of this article.
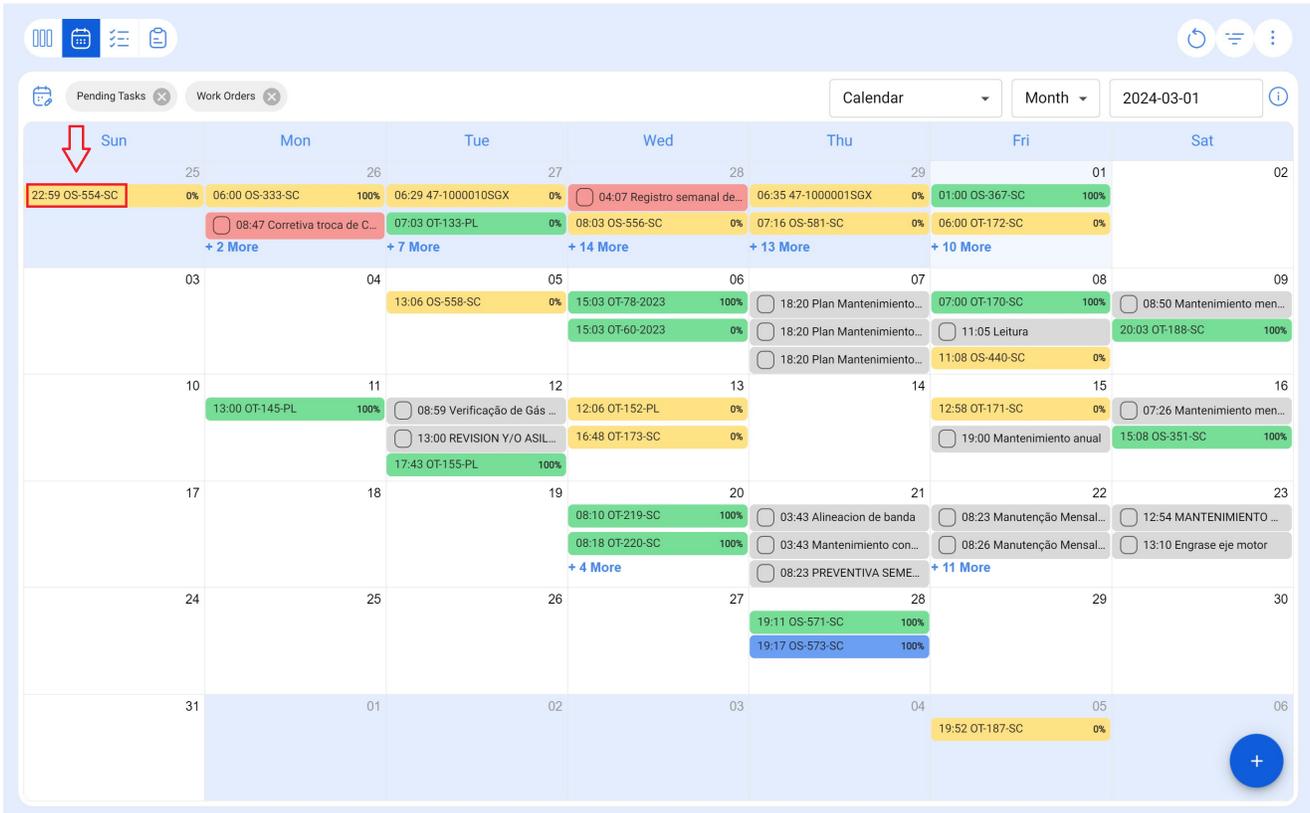
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  20 MB [Download](#)
- 📎 [help2.fracttal.com-Comment éditer et compléter un OT.pdf](#)
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