

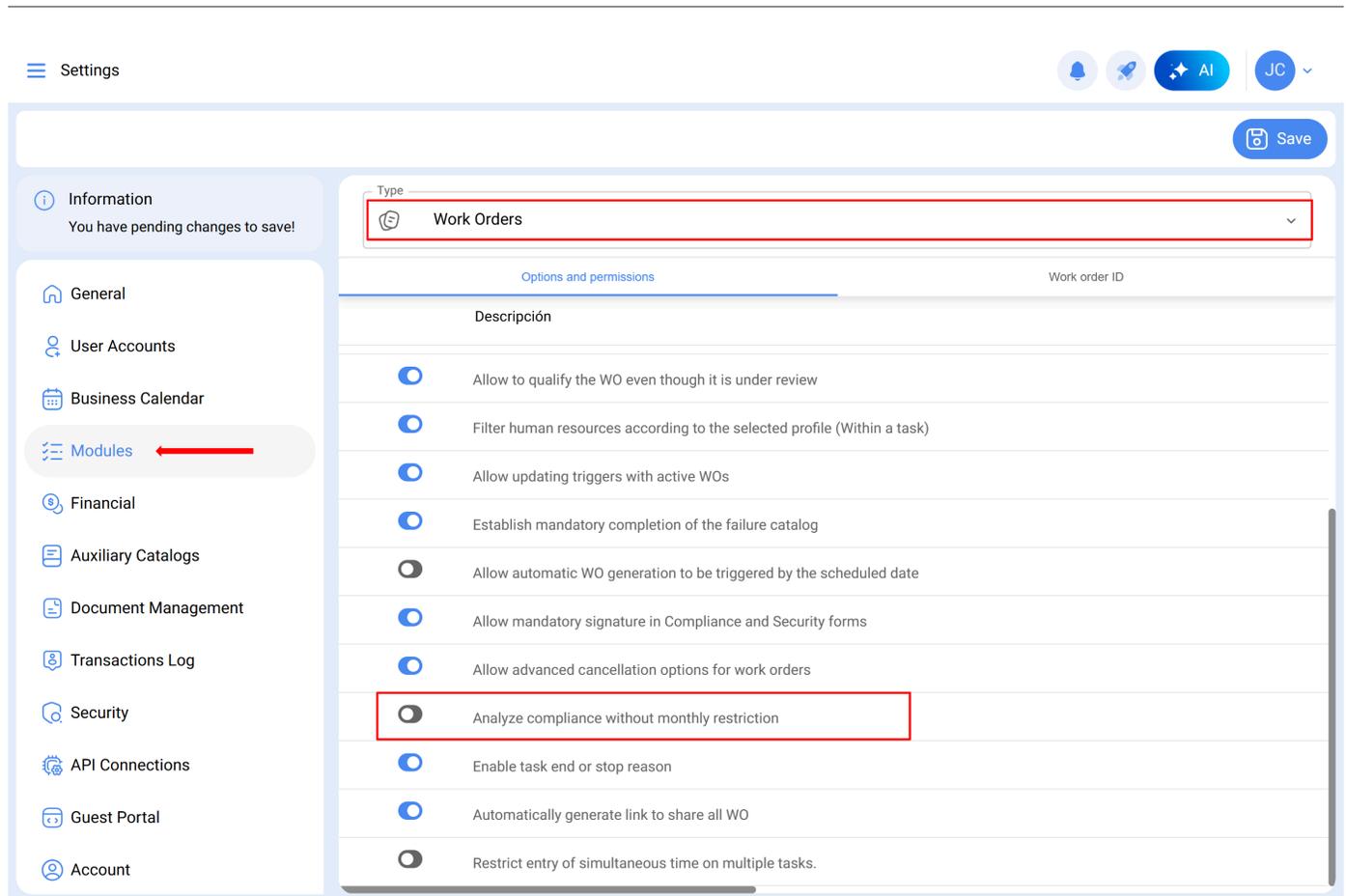
Planned Tasks Compliance Analysis: Monthly Restriction – Help Center

help.fractal.com/hc/en-us/articles/44194892766861-Planned-Tasks-Compliance-Analysis-Monthly-Restriction

In Fractal One, the planned tasks compliance analysis is an essential tool for maintenance management. Currently, we have two approaches for this analysis: the configuration **"Analyze compliance without monthly restriction" (ON)**, which offers greater flexibility in evaluating periods, and the configuration **(OFF)**, which operates based on the monthly restriction.

The "Analyze compliance without monthly restriction" setting can be found at:

Settings → Modules → Work Orders



The screenshot shows the 'Settings' page for 'Work Orders'. The left sidebar contains a navigation menu with 'Modules' selected. The main content area is titled 'Options and permissions' and lists various settings. The setting 'Analyze compliance without monthly restriction' is highlighted with a red box and is currently turned OFF. A 'Save' button is visible in the top right corner.

Options and permissions	Work order ID
Descripción	
<input checked="" type="radio"/> Allow to qualify the WO even though it is under review	
<input checked="" type="radio"/> Filter human resources according to the selected profile (Within a task)	
<input checked="" type="radio"/> Allow updating triggers with active WOs	
<input checked="" type="radio"/> Establish mandatory completion of the failure catalog	
<input type="radio"/> Allow automatic WO generation to be triggered by the scheduled date	
<input checked="" type="radio"/> Allow mandatory signature in Compliance and Security forms	
<input checked="" type="radio"/> Allow advanced cancellation options for work orders	
<input type="radio"/> Analyze compliance without monthly restriction	
<input checked="" type="radio"/> Enable task end or stop reason	
<input checked="" type="radio"/> Automatically generate link to share all WO	
<input type="radio"/> Restrict entry of simultaneous time on multiple tasks.	

*** Default value: OFF***

Configuration:

Analyze compliance without monthly restriction

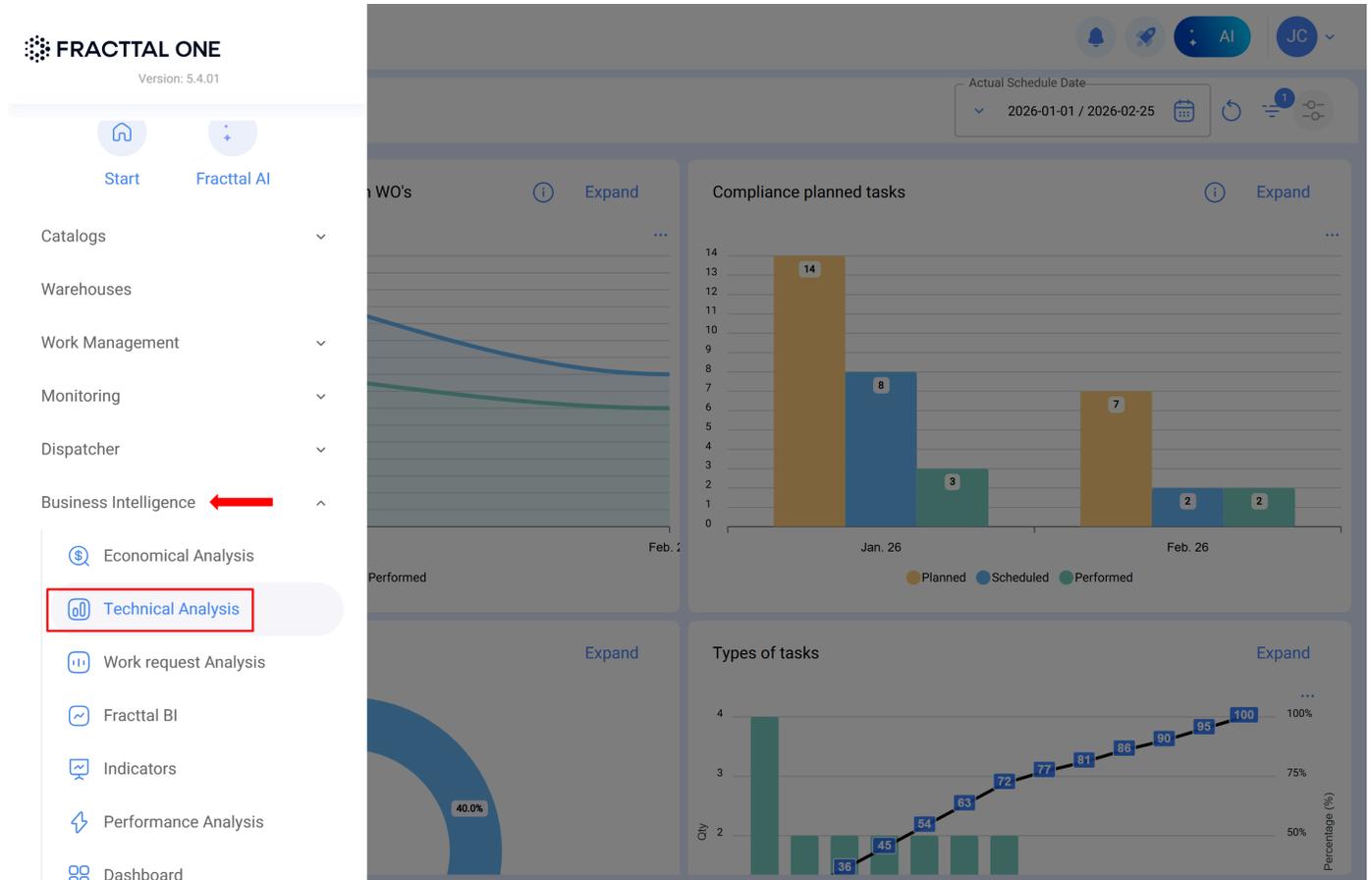
Available values:

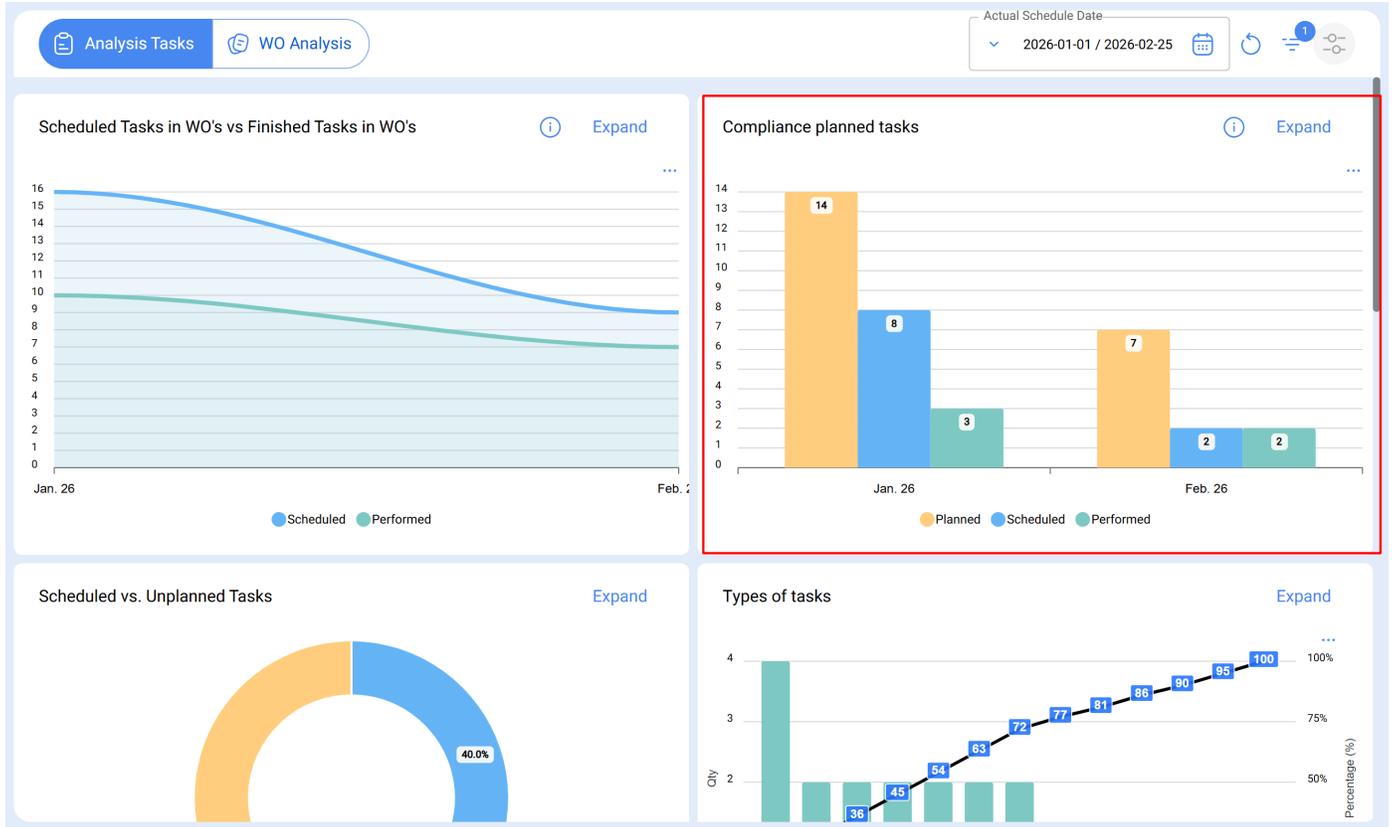
- **ON** → The calculation considers the entire selected range
- **OFF** → The calculation remains restricted to the calendar month

Where to view the compliance chart?

The chart can be viewed at:

Business Intelligence → Technical Analysis → Planned Tasks Compliance

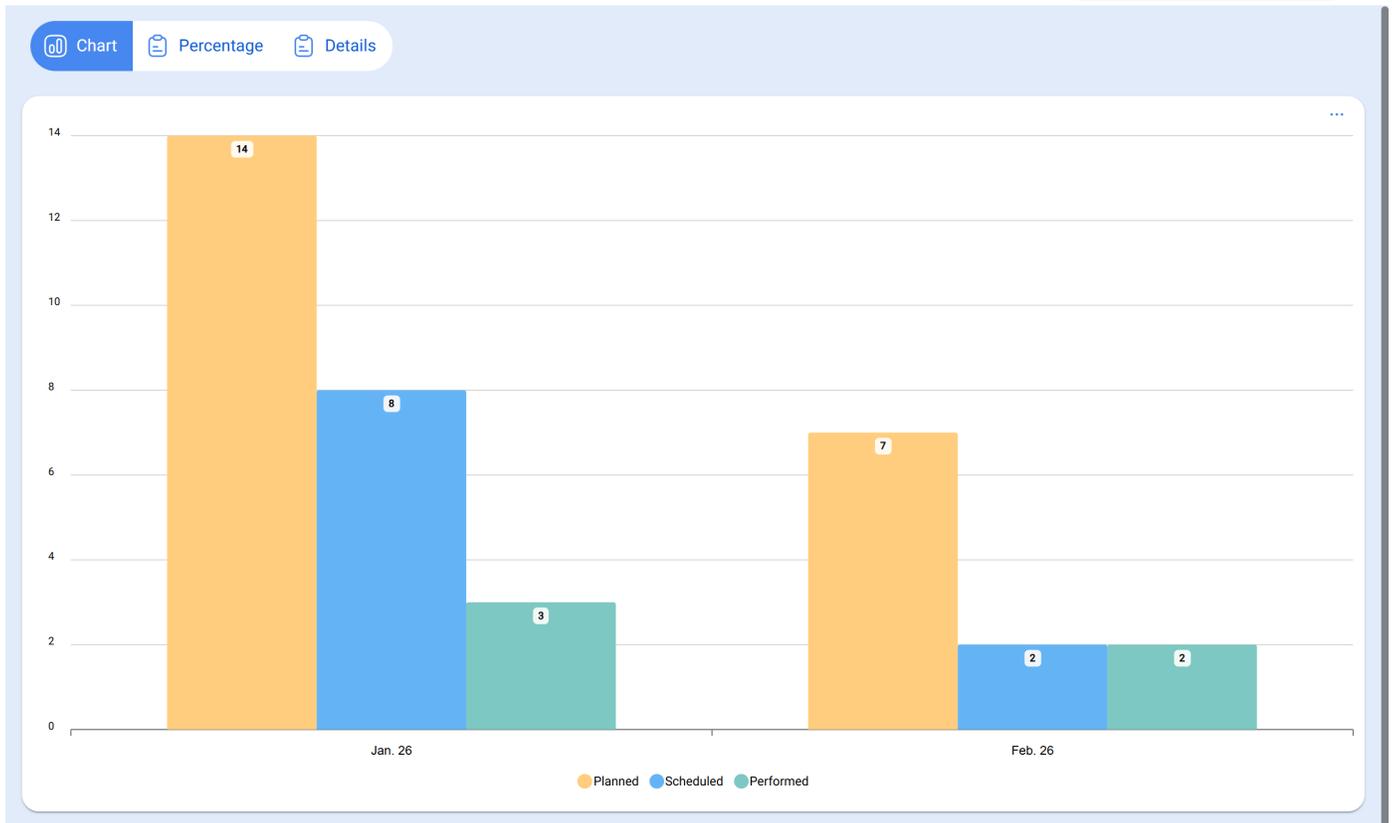




The chart presents three columns for each month:

- **Planned**
- **Scheduled**
- **Completed**

Even when a larger range is selected, the chart will continue to show the results **separated by month**, solely for visualization purposes.



Difference between the enabled and disabled configuration

The main difference between both modes lies in **how the system calculates task compliance.**

Enabled configuration (ON)

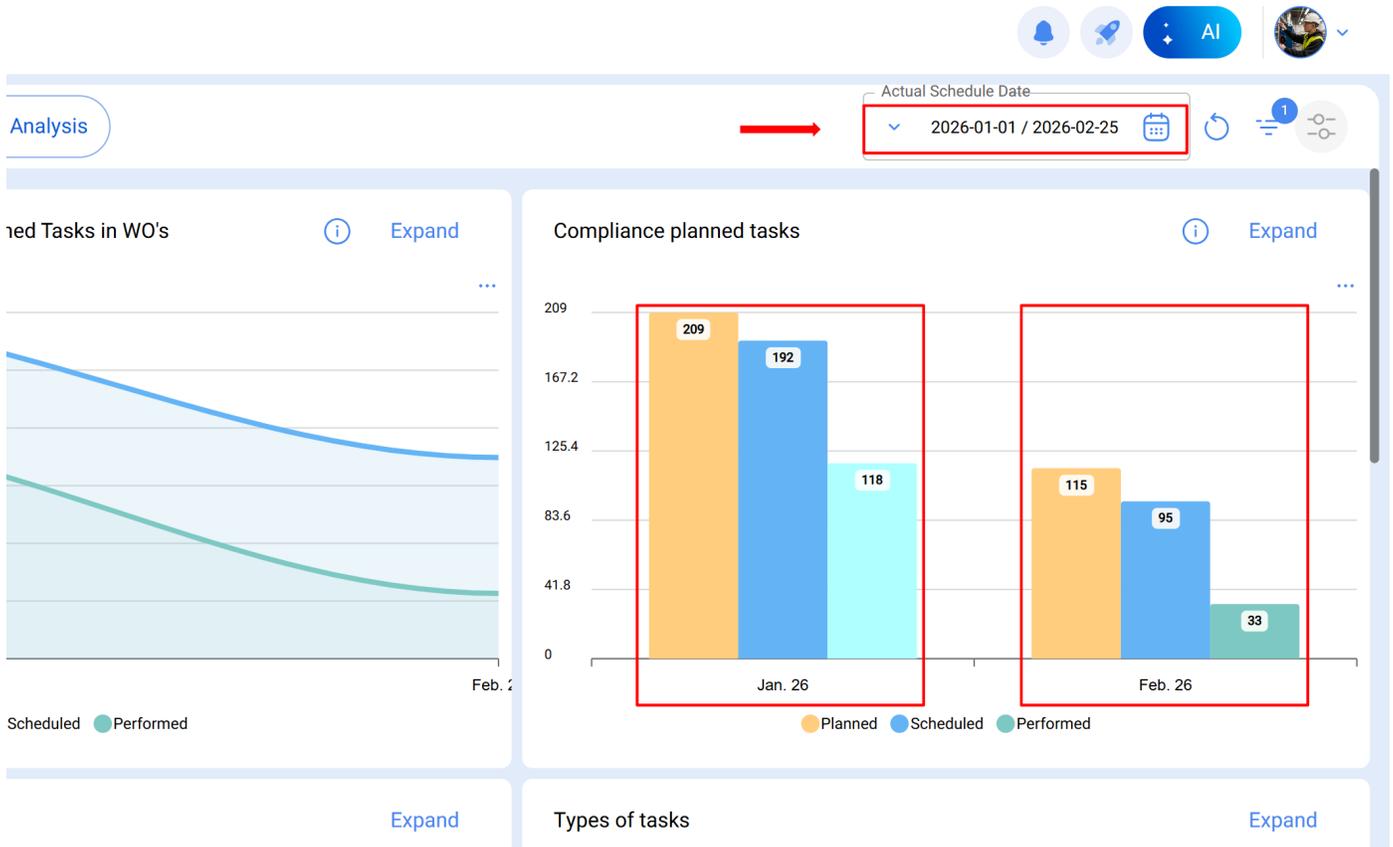
The screenshot shows a configuration interface for 'Work Orders'. At the top, there is a dropdown menu labeled 'Type' with 'Work Orders' selected. Below this, there are two tabs: 'Options and permissions' (which is active) and 'Work order ID'. Under the 'Options and permissions' tab, there is a list of configuration options, each with a radio button and a description. The option 'Analyze compliance without monthly restriction' is highlighted with a red rectangular box. The other options are: 'Allow automatic WO generation to be triggered by the scheduled date' (disabled), 'Allow mandatory signature in Compliance and Security forms' (enabled), 'Allow advanced cancellation options for work orders' (enabled), 'Enable task end or stop reason' (enabled), 'Automatically generate link to share all WO' (enabled), and 'Restrict entry of simultaneous time on multiple tasks.' (disabled).

Options and permissions	Work order ID
Descripción	
<input type="radio"/>	Allow automatic WO generation to be triggered by the scheduled date
<input checked="" type="radio"/>	Allow mandatory signature in Compliance and Security forms
<input checked="" type="radio"/>	Allow advanced cancellation options for work orders
<input checked="" type="radio"/>	Analyze compliance without monthly restriction
<input checked="" type="radio"/>	Enable task end or stop reason
<input checked="" type="radio"/>	Automatically generate link to share all WO
<input type="radio"/>	Restrict entry of simultaneous time on multiple tasks.

When the configuration is enabled:

- The calculation considers the entire selected date range
- The creation date of the WO does not influence the result
- Tasks are counted according to their scheduling and execution dates
- The analysis can be done in a single date range, even if it spans several months

This means that the calculation is **continuous within the period**, although the chart continues to show the results by month.



Example:

A WO created in **December** with a task scheduled for **January** and completed in **January**.

This task will be correctly counted in the month of January, since the calculation considers the execution within the analyzed period.

It is recommended to enable the setting when:

- WOs are created in advance
- There are preventive maintenance processes
- It is necessary to analyze broader periods
- Greater consistency between planning and execution is sought.

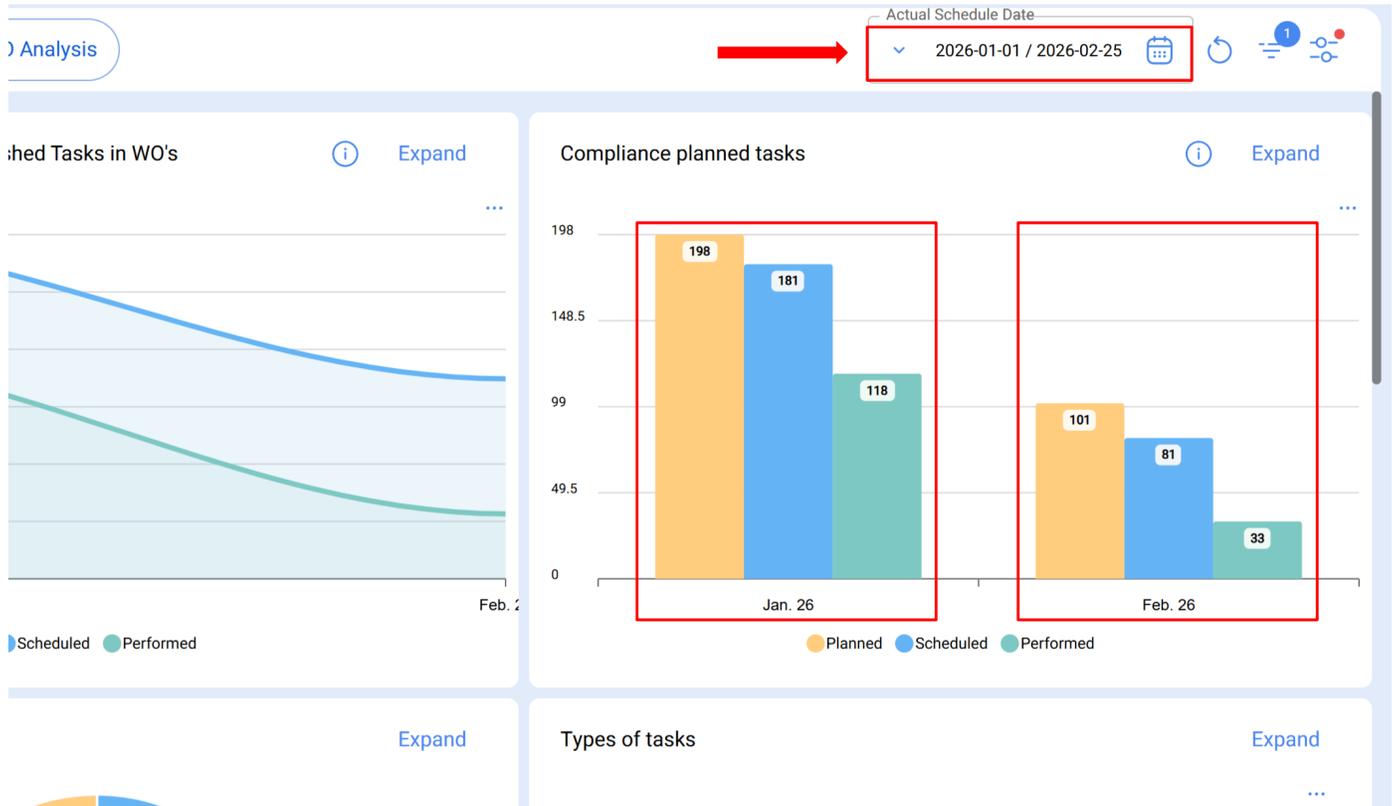
Disabled configuration (OFF)

The screenshot shows a configuration interface for 'Work Orders'. At the top, there is a dropdown menu labeled 'Type' with 'Work Orders' selected. Below this, there are two tabs: 'Options and permissions' (which is active) and 'Work order ID'. Under the 'Options and permissions' tab, there is a section titled 'Descripción' containing several toggle switches. The toggle for 'Analyze compliance without monthly restriction' is currently turned off (grey) and is highlighted with a red rectangular border. Other toggles include 'Allow automatic WO generation to be triggered by the scheduled date' (off), 'Allow mandatory signature in Compliance and Security forms' (on), 'Allow advanced cancellation options for work orders' (on), 'Enable task end or stop reason' (on), 'Automatically generate link to share all WO' (on), and 'Restrict entry of simultaneous time on multiple tasks.' (off).

When the configuration is disabled:

- The calculation is restricted to the calendar month
- The creation date of the WO influences the result
- Each month must be analyzed independently

For example, if the selected range is: January 1 – February 25



Validation must be done separately for:

- **January 1 – January 31**
- **February 1 – February 25**

Additionally, for tasks to be counted, the WO must have been created within the analyzed month.

It may be useful to keep the configuration disabled when:

- The company operates with strictly monthly operational cycles
- WOs are created and executed within the same month
- The same historical analysis criteria are desired to be maintained

For a detailed understanding of the planned tasks compliance analysis under a monthly restriction scheme, see the article: [Planned Tasks Compliance Analysis in Fractal One](#)