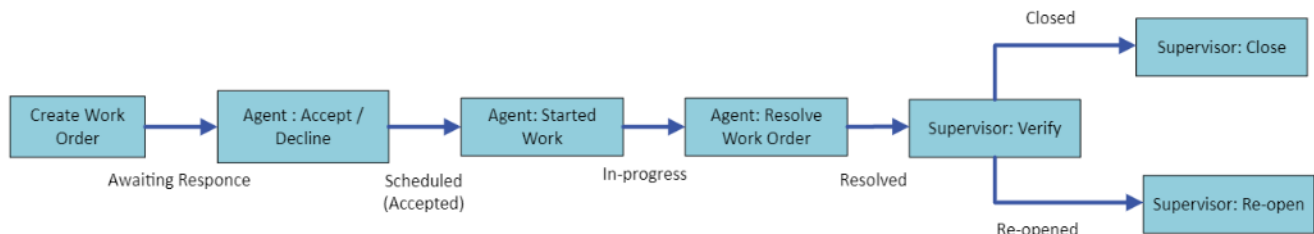


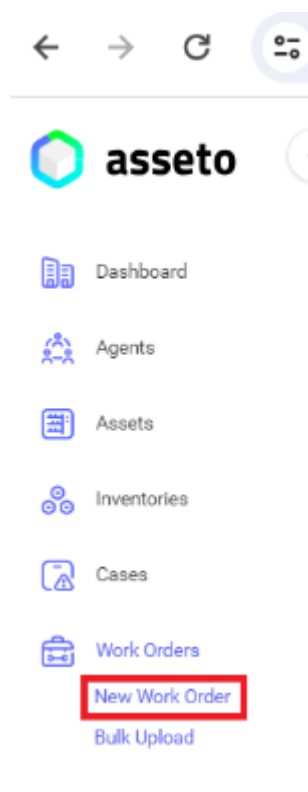
# 4. New Work Order.

## Work Order Flow:



## New Work Order:

Navigate to Work Orders >> New Work Order to create new Work Order.



## Create New Work Order:

New Work Order

1

Ad-hoc/Open

Create an ad-hoc or open work order.

2

Parent

Create a parent work order.

Work Order Details

Asset

Tasks

Schedule

Field Agent

Documents

e-PTW

Other Details

Work Order Details

3

By Asset

Create Work Order By Asset

4

By Location

Create Work Order By Location

5

Asset Name \*

+

Add Asset

Work Order Subject \*

Work Order Type \*

Description \*

Work Order Sub-Type \*

Tasks

Schedule

Field Agent

Documents

e-PTW

Other Details

Category

Task Template

Task List Template \*

+

Add Task

Schedule

Response SLA

Duration(Minutes/Calendar Terms)

Work Order Details

Asset

Tasks

Schedule

Field Agent

Documents

e-PTW

Other Details

Resolution SLA \*

Duration(Minutes/Calendar Terms)

Start Date

20/08/2024

Start time \*

Recurring Work Order

Agent

Auto Assign Agent

Open Request

Agent \*

Auto Assign

Work Order Details

Asset

Tasks

Schedule

Field Agent

Documents

e-PTW

Other Details

### Supervisor

Supervisor

### Documents

Drag files to upload or

1. **Ad-hoc / Open:** To create an ad-hoc or open work orders.
2. **Parent:** To create parent work order. One Parent work order can have multiple child work orders.
3. **By Asset:** To create Asset based Work orders.
  1. **Asset Name:** It's a Mandatory field. List of values configured in the settings can be viewed by typing the 2 letters in the Asset field.
  2. **Add Asset:** This option is used to add the Asset. On selecting the Asset from the list, this option will become able to use. Add Asset will result in showing the Asset Image, Asset Name, Serial Number / Bar Code of the Asset, Asset criticality and Location. Cancel symbol is used to remove the added Asset.
4. **By Location:** To create Work orders based on the Asset Location.
5. **Fill all mandatory and non-mandatory fields.** Based on the configuration the field values will auto populate for the fields like.
  1. Work Order Sub-Type & Category by selecting the Work Order Type.
  2. Task Template by selecting Work Order Type.
  3. Response SLA & Resolution SLA.
  4. Auto Assignment Agent.
  5. Auto Assignment Agent.
  6. Auto Assignment Agent.

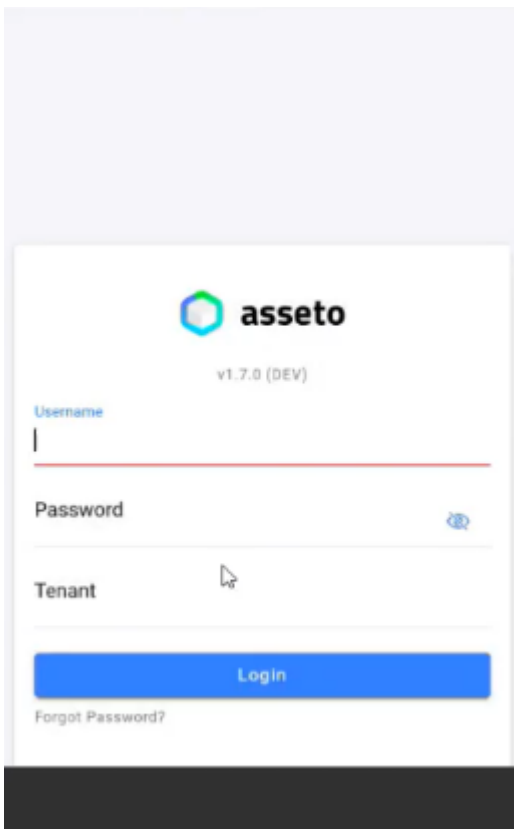
## Section Wise Details:

1. **Work Order Details:** This section contains Work order details like, Asset / Location details, Work order subject, type, sub-type, category & description.
2. **Task Template:** Task template is a mandatory field used to assign a task to the Agents. It contains task details & fields required to be updated by the field agent over task completion.
3. **Schedule:** It displays the Resolution & Response SLA details as configured in the settings. Based on the Start date that the User selects, the SLA calculation gets calculated automatically based on the configuration.
4. **Agent:** We have 2 options in the Agent section. I.e., Auto assign & Open request. Auto assignment will work based on the Auto assignment agent configuration. Open request

option provides a flexibility to Agents to accept. Notification of Work order creation will be triggered to all the Agents & Agents can decide whether to pick or not.

5. **Child Work Order Group:** This section will populate only for Work Orders on Parent – child hierarchy. Work orders can be grouped either based on Assets or Locations. Multiple assets / locations are to be selected for creating child Work orders.
6. **Supervisor:** Work Orders will be assigned to the Supervisor who fulfils the Auto assignment rules criteria.
7. **Documents:** This section is used to upload related documents.
8. **e-PTW:** Used to apply e-PTW for specific Work Order.

## Mobile App View: Field Agent:



Ad-hoc work order displayed in the Mobile app. Field Agent can Accept or Decline the request.



Hi, Deepak



Syncing...



Inventory



Work Order



BCA

Today Work Order

[Refresh](#) [View All](#)

Awaiting Response

High

WO-V1

1582023645105

[ELURU, ANDHRA PRADESH](#)

[Tue, 15 Aug 2023](#)

[12:26 PM - 03:26 PM \( 03:00 \)](#)

Accept

Decline



Work Order Details



Syncing...

Awaiting Response

WO-V1

1582023645105

Wo creation

[Time Remaining 03H 52M](#)



Biometel



[12:26 PM - 03:26 PM \( 3H \)](#)



[ELURU, ANDHRA PRADESH](#)



[Work Order Agents](#)



Accept

Decline

Additional Details



SLA Summary



## Create Recurring Work Order:

To create recurring work orders, select the Recurring Work Order check box from the new work order creation page.

The screenshot shows the 'New Work Order' page. On the left is a sidebar with 'Work Order Details' and sub-items: Asset, Tasks, Schedule, Field Agent, Documents, e-PTW, and Other Details. The main area has a 'Schedule' section with three rows of input fields: 'Response SLA' and 'Duration(Minutes/Calendar Terms)', 'Resolution SLA \*' and 'Duration(Minutes/Calendar Terms)', and 'Start Date' and 'Start time \*'. To the right of these fields is a checkbox labeled 'Recurring Work Order', which is highlighted with a red rectangular box. Below the 'Schedule' section is an 'Agent' section with two radio buttons: 'Auto Assign Agent' (selected) and 'Open Request'.

Selecting Recurring Work Order check box displays the recurring work order parameters. It provides the flexibility to the User to schedule work orders for future periods.

This screenshot shows the recurring work order parameters section. It includes a dropdown for 'Generate occurrences prior to st...', a 'Repeat Every' section with a value of '1' and a unit of 'Hour', an 'Until \*' field with a clock icon, an 'End Recurrence' section with a 'By Date' dropdown, and an 'End Date \*' field with a calendar icon. Below these is a 'Conflicting Work Orders' section with a heading, a paragraph explaining that recurring work orders may be affected by non-working days, public holidays, or blackout days, and a statement that currently 0 work orders will fall under these conditions. There are three radio buttons: 'Proceed to create work orders' (selected), 'Don't create work orders on non-working days/public holidays/blackout days', and 'Reschedule work orders to the next working day'. At the bottom, a purple bar displays the summary: 'Occurs every 1 hour from until starting until'.

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Revision #4

Created 11 September 2024 09:33:09 by Divya Bharathi Marreddy

Updated 12 September 2024 10:12:26 by Sushma Palapatta Chandran