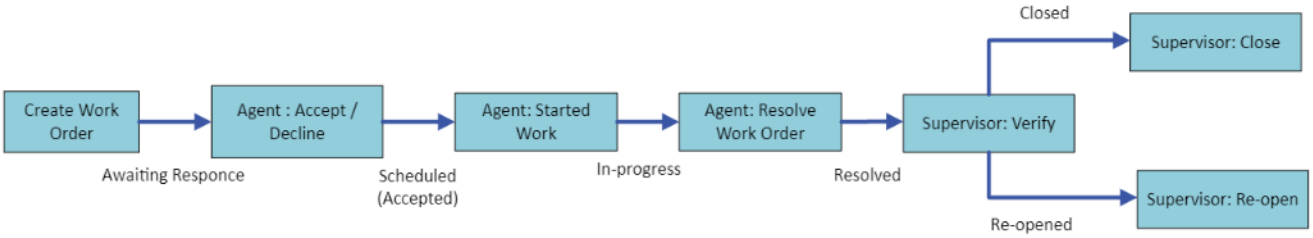
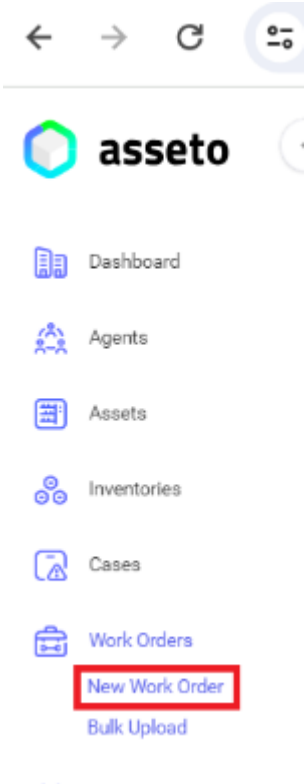
# 4. New Work Order.

## Work Order Flow:

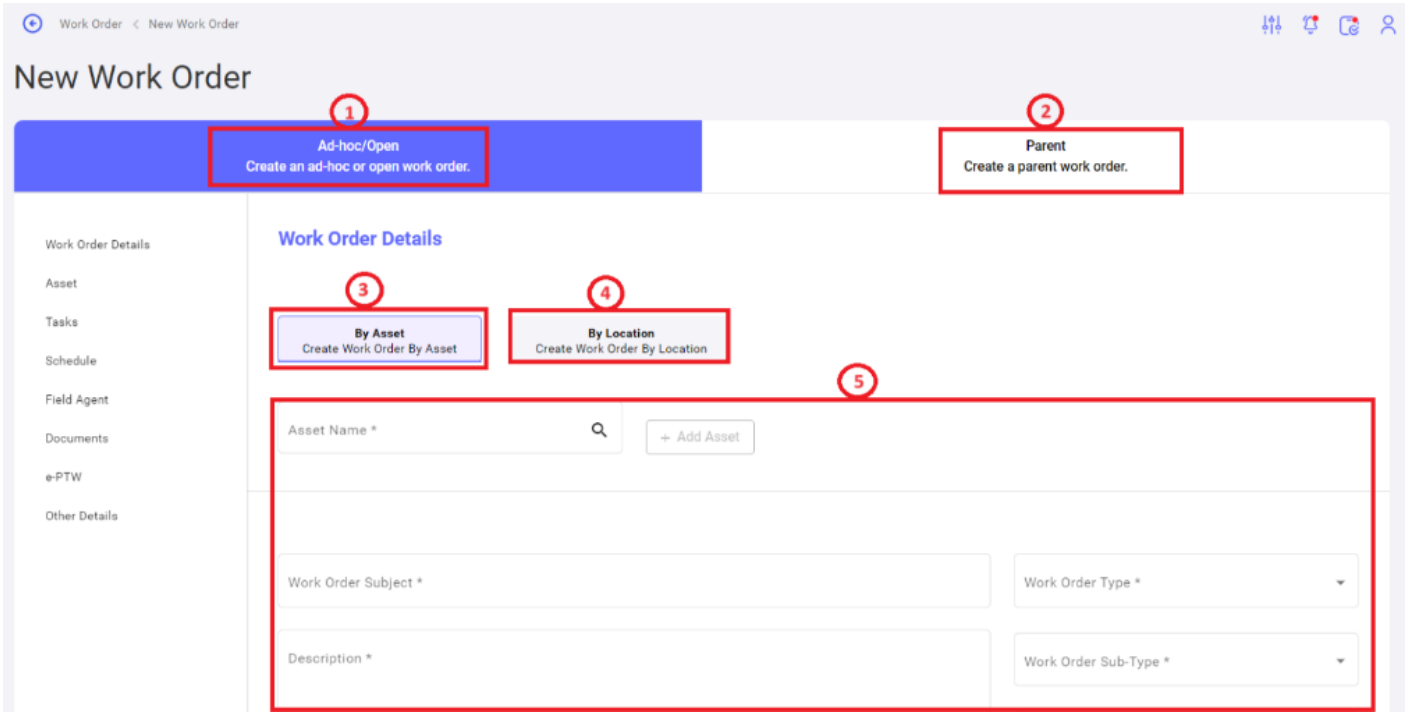


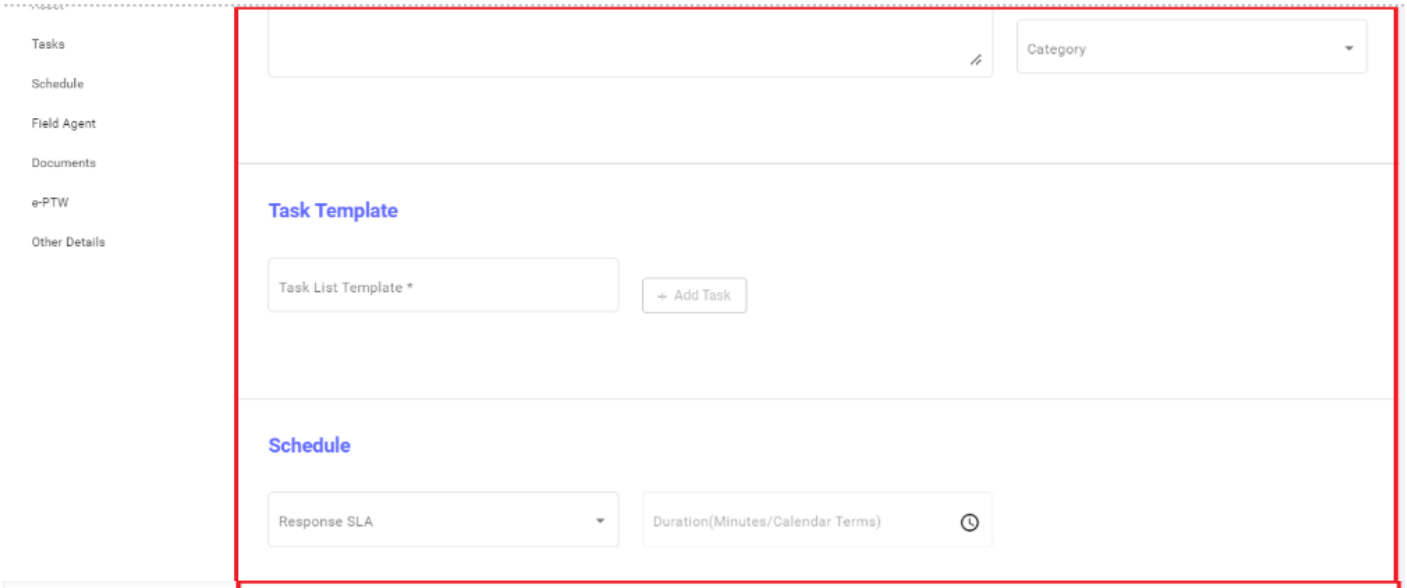

## New Work Order:

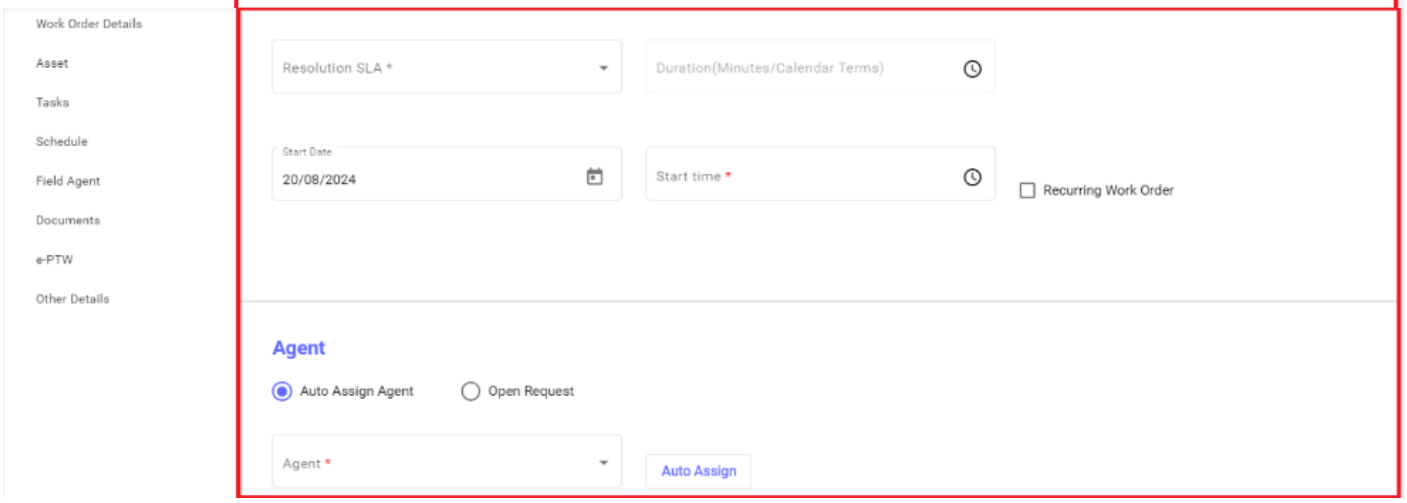
Navigate to Work Orders >> New Work Order to create new Work Order.

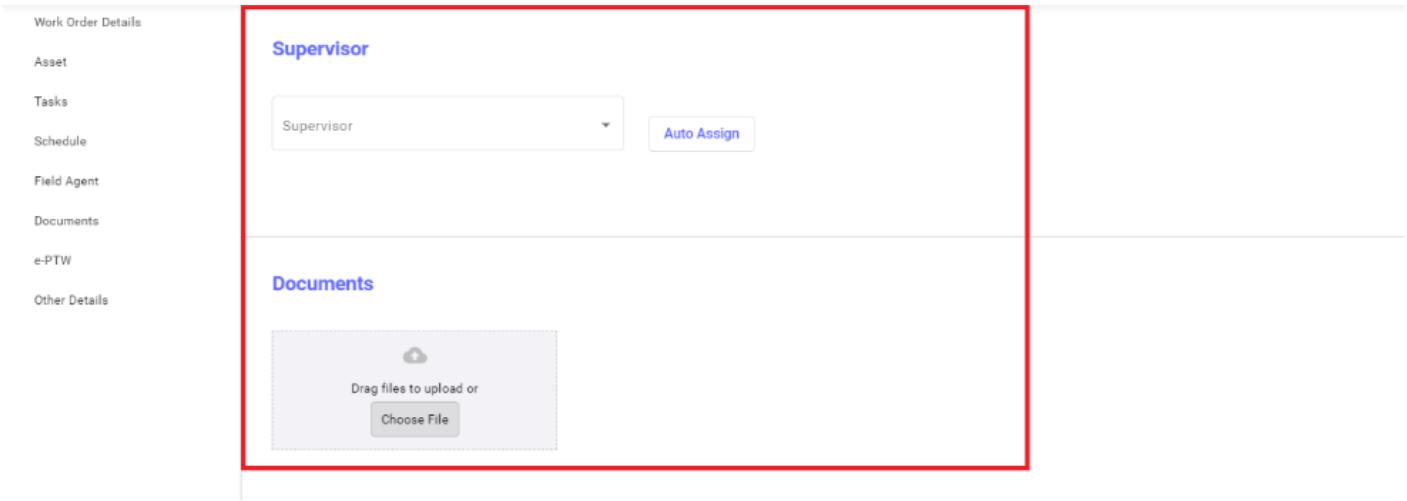



## Create New Work Order:


Work Order
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




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.

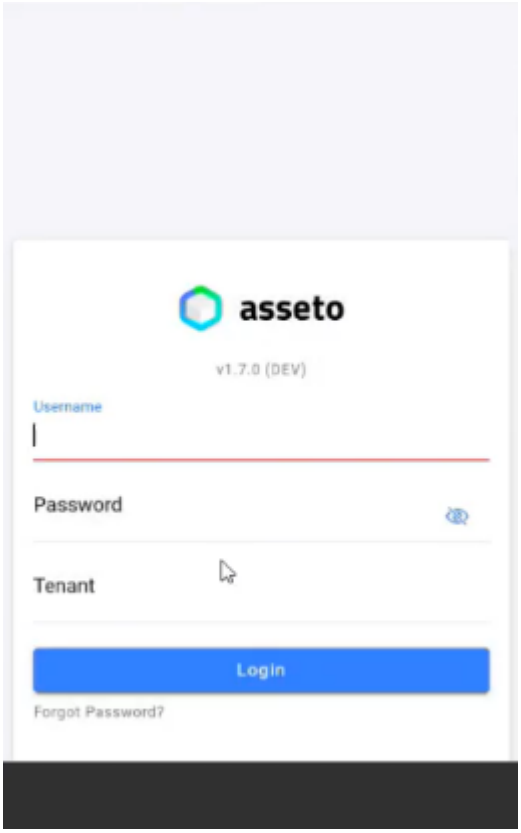
## Section Wise Details:

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

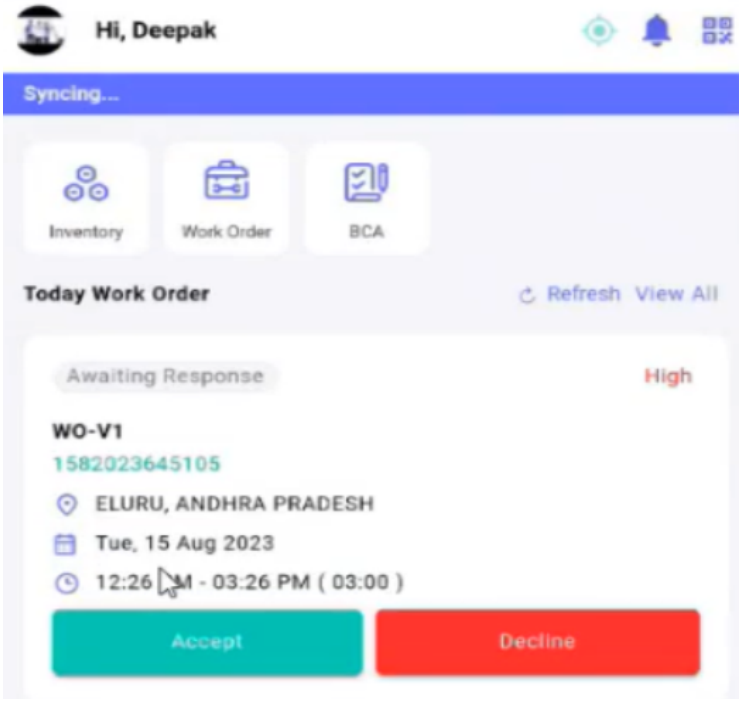
option provides a flexibility to Agents to accept. Notification of Work order creation will be triggered to all the Agents & Agents can decide whether to pick or not.

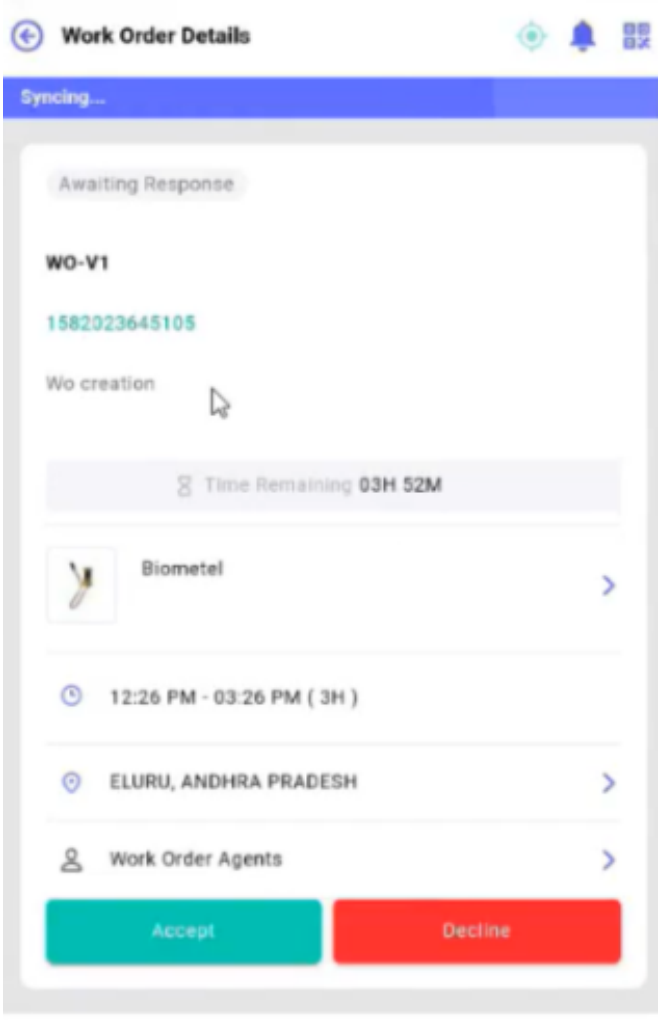
5. **Child Work Order Group:** This section will populate only for Work Orders on Parent – child hierarchy.  Work orders can be grouped either based on Assets or Locations. Multiple assets / locations are to be selected for creating child Work orders.
6. **Supervisor:** Work Orders will be assigned to 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.



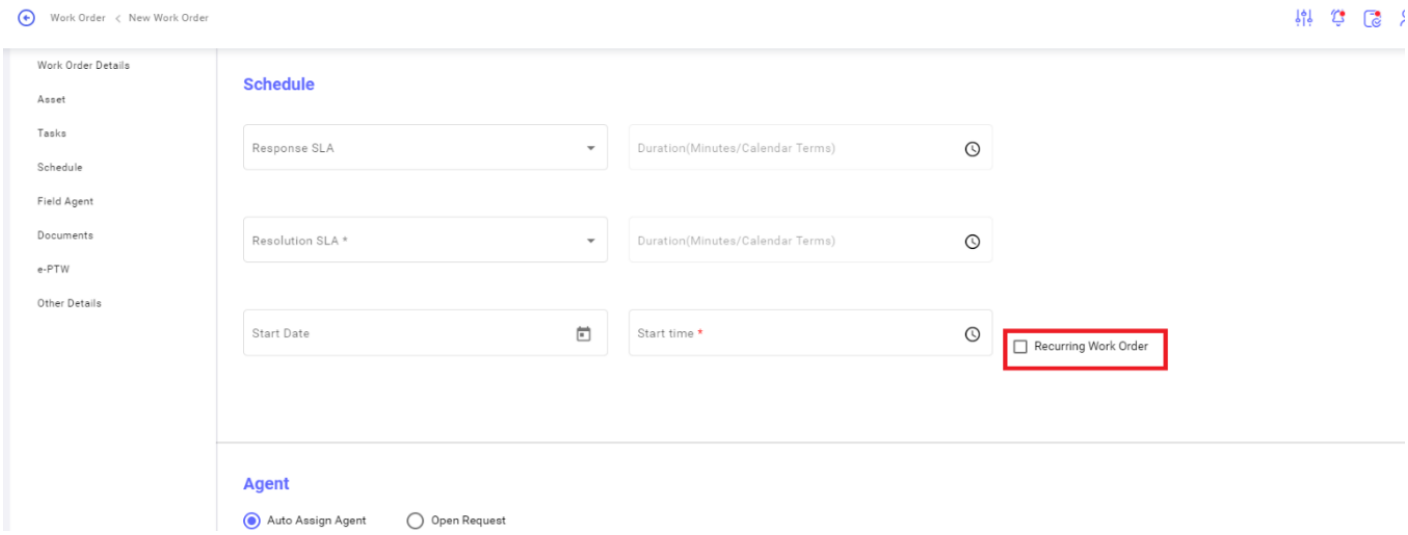




Additional Details +

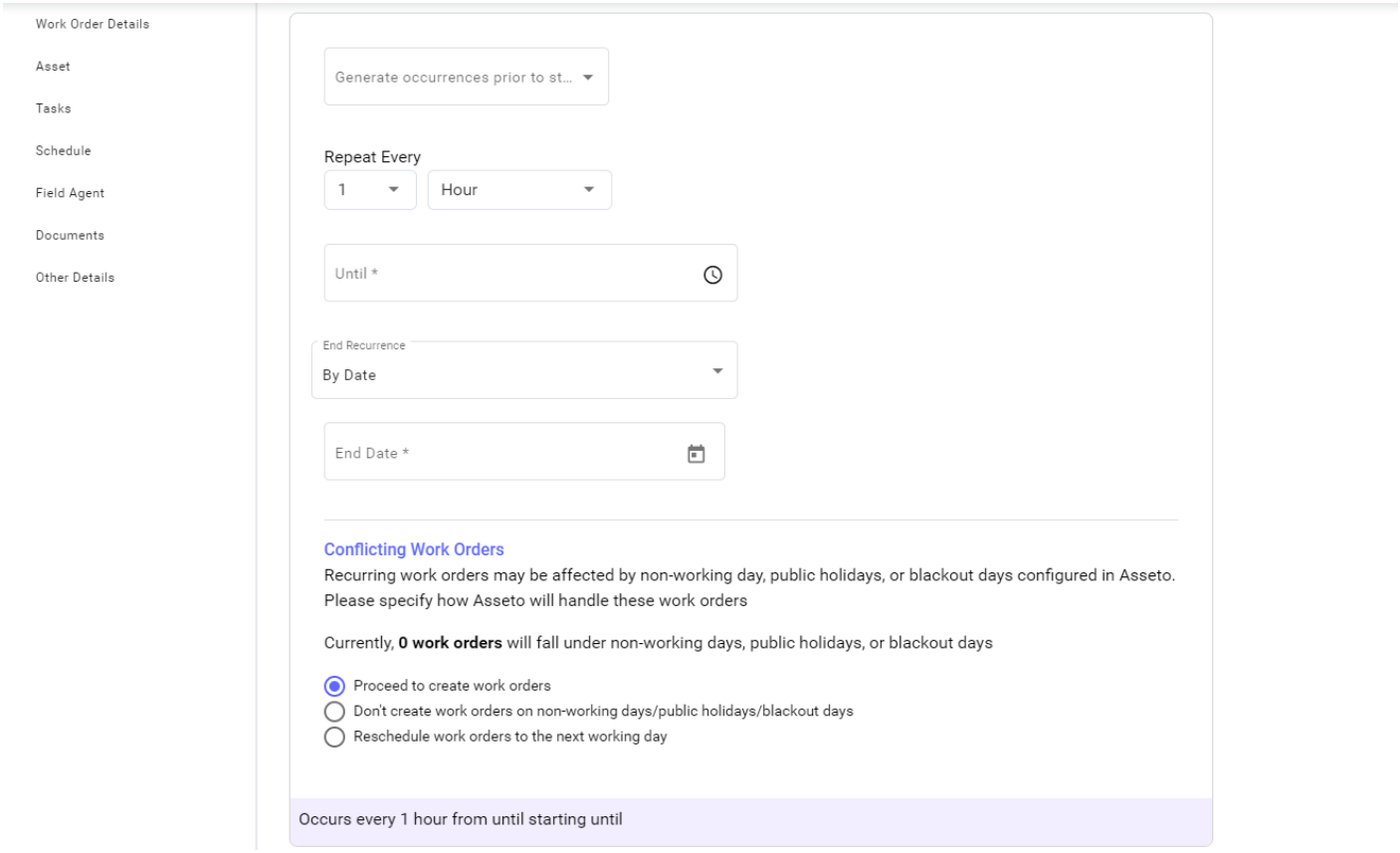
SLA Summary +

## Create Recurring Work Order:

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




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.



Revision #4
Created 11 September 2024 09:33:09 by Divya Bharathi Marreddy
Updated 12 September 2024 10:12:26 by Sushma Palapatta Chandran