

Planning Work Orders

📅 Wed, Jan 17, 2024 📁 Planner

Using the Planner, Resources can plan work for themselves or for their Branches/Tier 2 Resources whether it be for today or a time in the future. To plan Work Orders, follow these steps:

1. Open the Planner by selecting the Resource (Tier 1 or Head Office only) from the Resource List and clicking "Planner". The Work Order Planning screen is displayed.
2. At the bottom of the screen is the Work Order Types, Unplanned Work Orders and Actions section. These sections are used to view the Work Orders that require planning.
3. Select the Types of Work Orders from the Work Order Types section. Once a type has been selected, the Unplanned Work Orders section is populated with Work Orders of the type selected.

Note: The Work Orders that are displayed in the Unplanned Work Orders section have all been accepted by the Resource but have not had an ETA set. Any that have already had an ETA set will appear on the calendar.

4. Click and drag a Work Order from the Unplanned Work Orders section to the desired date on the calendar. This populates the Actions table with the actions that will occur by planning the Work Order as well as enabling the "Commit" and "Cancel" buttons. When planning a Work Order, it will be highlighted in yellow with an "*" next to it to signify that it is being changed.

Note: If a Work Order is coloured in grey, this means that it has been started and it cannot be moved between Resources.

Note: When planning PPM Work Orders the Work Orders cannot be planned before or after Financial Dates on the Contract. If the user tried to do this then they will displayed the following message just above the calendar:

You cannot plan work orders outside the financial dates set by the contract

5. When the Work Order is in the correct place on the calendar, click "Commit" to commit the change and to update the ETA on the Work Order. Doing this will update the Event Log in the Work Order as well. Alternatively, if the wrong Work Order is being planned then click the "Cancel" button to cancel the planning of the Work Order.

Note: When planning a Work Order, the Work Order Types and Unplanned Work Orders section are greyed out as only one Work Order can be planned at a time before committing the changes.

6. Once all planning has been completed, click "Close" to close down the Planner.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=145>