

SRAs - Scope & Resource Allocation

Introduction

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About the SRAs Module

The Scope (What, Where, When) & Resource (Who) Allocation (SRA) module provides the required service levels for Equipment/Service Types by Resource for any Operational and Non-Operational Work Orders. The SRA functionality allows the User to add multiple Resources to a set scope at Work Order Type, Sub Work Order Type or Equipment/Service Type level, there is also the flexibility to define SLR's (Service Level Requirements) down to individual Building level if required.

An SRA has to be created before a Contract can be created. Note: In all cases the terms of a Contract will always supersede those associated with an SRA.

SRA functionality includes:

- Resource allocation to reactive tasks by Work Order Type, Sub Work Order Type and Equipment/Service Type (also referred to as Task Type)

- SLR recording by reactive task down to Building level

- Resource prioritisation for reactive tasks

- Ability to set the following SLR (Service Level Requirement) types:

- Operational SLR – The 'Response' Service Level

- Fix SLR – Applicable to both Operational and Non-Operational Work Orders

- Priority – This allows for a name to be applied to any specific SLR settings by Task by Building

- Ability to see the Contract Managed Start and End Dates

Once created an SRA will feed the correct information regarding scope, resource and service level requirements for Buildings to the User in the Work Order process.

Pre-Requisites for setting up SRA:

- Clients

- Work Order Types and related data

- Buildings

- Resource

Certain actions can be performed which will trigger something known as an "Agreement Association Change". The "Agreement Association Change" will analyse the action performed and make the corresponding change to the association between the Work Order and the SRA/Contract. This will involve checking to see if the Work Order should be associated to the SRA or to the Contract, whether it is associated Comprehensively to the Contract and whether the finance values are correct. The "Agreement Association Change" can occur via actions performed on the Work Order, SRA, Contract and changes made to Building Managed dates.

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