Allocating Resource and Setting the Schedule for Attendance

💾 Wed, Jan 17, 2024 🛛 🖿 Creating a Reactive Work Order

This section of a Work Order is where the User can assign a Resource and set the schedule of when the work needs to take place.

1. If the Work Order is part of an SRA or Contract agreement, then the Resource will automatically be selected and the schedule will automatically be set to the agreed SLA. If there are multiple Resources set on the SRA then these will be shown in order of priority. However, if a Contract exists this will always appear at the top of the list above any SRA. Furthermore, if an Asset has been selected against the Work Order, and that Asset is under Warranty, the Warranty Resource would be suggested as the default Resource to use. Therefore order of allocation is as follows: Warranty > Contract > SRA > Manual Allocation.

2. An alternate Resource can be selected by searching in the bottom part of the screen and double-clicking on the chosen Resource (or highlighting the Resource and clicking on the Allocate button). Click "OK" when the Resource has been selected.

Allocat	e Resource											
Selected Resource Clear Refresh All												
R	esource Name	ASHLEA LIMITED	SHLEA LIMITED			Resource Number		ASH102				
Association Type					Rank							
Agreement Name					Agreement Code							
Attendance					Fix							
Temp Fix						Priority						
Asso	iated Resources											Allocate
Rank	Resource Name		Resource Number	Association Typ	e Code	Attend	lance	Fix	Tomp Eiv			Priority
Filt	Filter		Filter	Filter	Filter	Attent	ittendance i			remp rix		Filter
1	PRICE PLANTS	LTD	PRI103	Contract	468/1	03/08/	/2014 16:05					
Avail	able Resources											Allocate
Resource Name								Resource Number		Warra	nty?	
Filter								Filter		Filter.	• =	
ASHLEA LIMITED								ASH102				
BRIGHSTONE LANDSCAPING LTD							BRI104					
C G C S MIDLANDS LTD							CGC100					
DODSWORTHS I TD								DOD100	100			
000									5 5 5 1 1 0			
										ОК		Cancel

3. Now that a Resource has been selected the screen below will open and the Resource selected will be displayed in the Resource field. The schedule can now be set for attendance.

The SLA is automatically set based on the SRA or Contract. Remember this is the 'best' response time and the information attained so far should be used to allocate the most suitable response time either at this point if the job is urgent or in the future if it is minor.

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To be more specific, drag and drop any of the timestamps required for attendance.

Up To - advises the Resource that they are to arrive on site any time up to the end of the time allotted.

Exact - denotes the exact time the Resource is required to be on site for.

Start & Finish - should be used together to denote the specific start and finish times of the work required.



ETA - this is available as an Agent Action or Call In Action and cannot be set at this point.

4. The availability of the Building that the Work Order has been created for will be shown on the calendar using the colour coding below:



5. The availability of the Resource that has been allocated to the Work Order will be shown on the calendar using the colour coding below:



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6. Use the drop down date picker from the Current Date field to choose the date you want to see on the calendar. The Visit Start Date field will show the current Start Date/Time selected on the scheduler. The Visit End will show the current Stop Date/Time selected on the scheduler. The ETA field will be set based on the 'Up To' time and the call out costs have been calculated using the Rates set up against the Resource selected.

◀ February 2013 ►											
Mon	Tue	Wed	Thu	Fri	Sat	Sun					
28	29	30	31	1	2	3					
4	5	6	7	8	9	10					
11	12	13	14	15	16	17					
18	19	20	21	22	23	24					
25	26	27	28	1	2	3					
4	5	6	7	8	9	10					

7. To reset the schedule at any time click the "Clear All" button at the top. This will keep the selected Resource but will remove any dates/times set and allow the user to select new dates.

8. Once the Resource and schedule has been set click the "OK" button.

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