

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.

The screenshot shows the 'Allocate Resource' dialog box. It is divided into three main sections: 'Selected Resource', 'Associated Resources', and 'Available Resources'.
1. **Selected Resource:** This section contains several input fields. 'Resource Name' is set to 'ASHLEA LIMITED' and 'Resource Number' is 'ASH102'. Other fields for 'Association Type', 'Agreement Name', 'Attendance', 'Temp Fix', 'Rank', 'Agreement Code', 'Fix', and 'Priority' are currently empty.
2. **Associated Resources:** This is a table with columns: Rank, Resource Name, Resource Number, Association Type, Code, Attendance, Fix, Temp Fix, and Priority. The first row is selected, showing Rank '1', Resource Name 'PRICE PLANTS LTD', Resource Number 'PRI103', Association Type 'Contract', Code '468/1', and Attendance '03/08/2014 16:05'.
3. **Available Resources:** This is a list of resources with columns: Resource Name, Resource Number, and Warranty?. The list includes:

- ASHLEA LIMITED (Resource Number: ASH102)
- BRIGHSTONE LANDSCAPING LTD (Resource Number: BRI104)
- C G C S MIDLANDS LTD (Resource Number: CGC100)
- CLAPHAMS LANDSCAPE SERVICES LTD (Resource Number: CLA102)
- DODSWORTHS LTD (Resource Number: DOD100)

Buttons for 'OK' and 'Cancel' are located at the bottom right of the dialog.

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.

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.

Allocate Resource and/or Set Schedule

Resource PRICE PLANTS LTD Select

Sun 03 Aug Mon 04 Aug Tue 05 Aug Wed 06 Aug Thu 07 Aug Fri 08 Aug Sat 09 Aug

14 30
15 00
15 30
16 00
16 30
17 00
17 30
18 00
18 30
19 00
19 30
20 00
20 30
21 00
21 30
22 00
22 30
23 00
23 30

Up To
Exact
Start
Finish

Building Availability
Occupied
Trading
Closed

Resource Availability
In hours
Out of hours
Not available

Clear All

August 2014
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 29 30 31
1 2 3 4 5 6 7

Visit Start Sunday, 03 August 2014 @ 16:05
Visit End
ETA
Est Cost £0.00 for 90 minutes on site
Day rate £0.00 Use day rate

Enter notes here...
OK Cancel

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:

Building Availability

Occupied
Trading
Closed

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:

Resource Availability

In hours
Out of hours
Not available

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.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=240>