

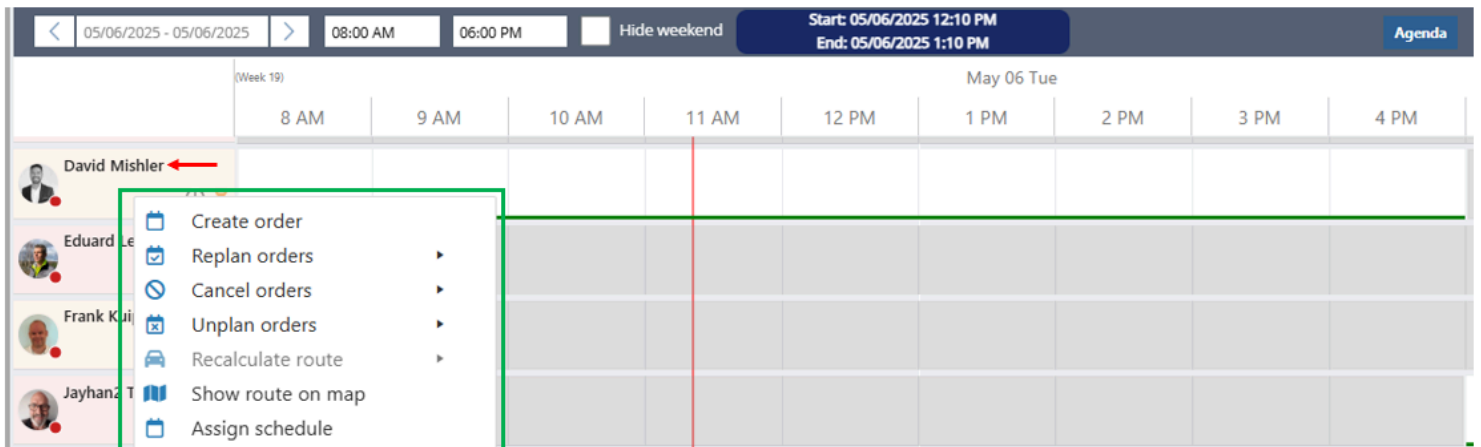
Planboard Engineer Options

Last updated by | David Mishler Gomocha | May 6, 2025 at 11:50 AM GMT+2



Planboard Engineer Options

On the Planboard, right-clicking on an engineer will open the context menu, displaying a list of available actions that can be performed on the selected engineer.



Create Order

Users can create order(s) for specific engineers

The screenshot shows a web application interface for managing an order. At the top, there's a header with the order ID "#P2431864:1" and a search icon. Below the header, there are tabs for "Order", "Registrations", "Questionnaire", and "Status history". A red error message at the top states: "Error: Please solve errors and try again" with a sub-message "Type is required".

The main content area is divided into four columns:

- Order Data:** Fields include Invoice types, Name, Order Number (P2431864:1), Status (Created), Status date and time (5/6/2025, 11:24 AM), Reason, Remark, Reported time (5/6/2025, 11:24 AM), Customer, Assets, Contract, Type* (with a red "Type is required" error), Priority, Override auto-added skills, Skills, Project Number, and Description.
- Order Planning:** Fields include Engineer group (highlighted with a green box and containing "David Mishler"), Work Order Number, Engineers, Preferred engineer (David Mishler), Scheduled start date & time (5/6/2025, 11:25 AM), Scheduled end date & time (5/6/2025, 12:25 PM), Duration (000:01:00), Default warehouse for engineer, SLA start date & time (5/6/2025, 11:29 AM), SLA end date & time, SLA duration (000:00:00), Recurring order, Appointment Fixed?, Engineer Fixed?, Timeslot startdate, Timeslot enddate, Fixed timeslot, and Cause.
- Address and contact data:** Fields include Predefined addresses, Street, House Number, House number addition, City, Zip Code, State, Country, Region* (NC), Additional Address Info, Latitude, and Longitude. A "SELECT LOCATION" button is at the bottom.
- Discussion:** A text area with a "Paragraph" dropdown and bold/italic formatting options. An "Internal" checkbox and an "ADD" button are at the bottom right.

At the bottom, there are "CANCEL", "SAVE AND", and "SAVE AND PLAN" buttons.

Replan Orders

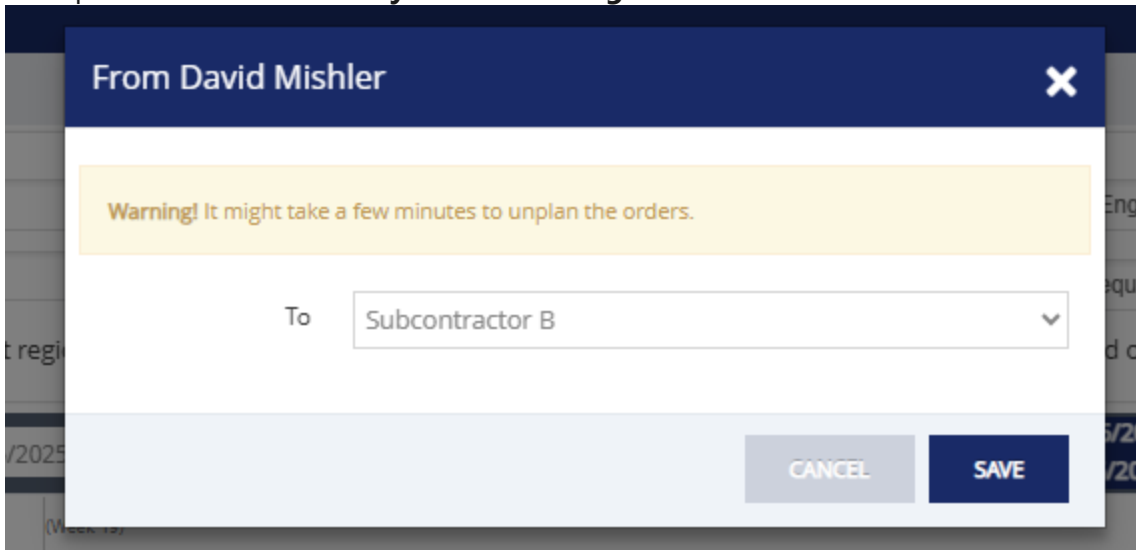
Users can replan orders that have been assigned to engineers. When a replan option is selected, a pop-up will appear allowing the user to specify the details of the new plan

The screenshot shows a calendar interface. On the left, there's a list of engineers: David Mishler, Eduard Leuv, Frank Kuiper, Jayhan2 Talin, John Learned, and Koen van der Borgh. A context menu is open over the calendar, listing several actions: "Create order", "Replan orders" (highlighted in green), "Cancel orders", "Unplan orders", "Recalculate route", "Show route on map", and "Assign schedule".

The calendar grid shows time slots from 8 AM to 3 PM. A red vertical line is positioned at 11 AM. A green-bordered pop-up window is overlaid on the calendar, containing the following text:

- All orders for today to another engineer
- All orders for today to another engineer and different day
- All orders for today to same engineer and different day
- Within a timespan to another engineer
- Within a timespan to another engineer and different day
- Within a timespan to same engineer and different day

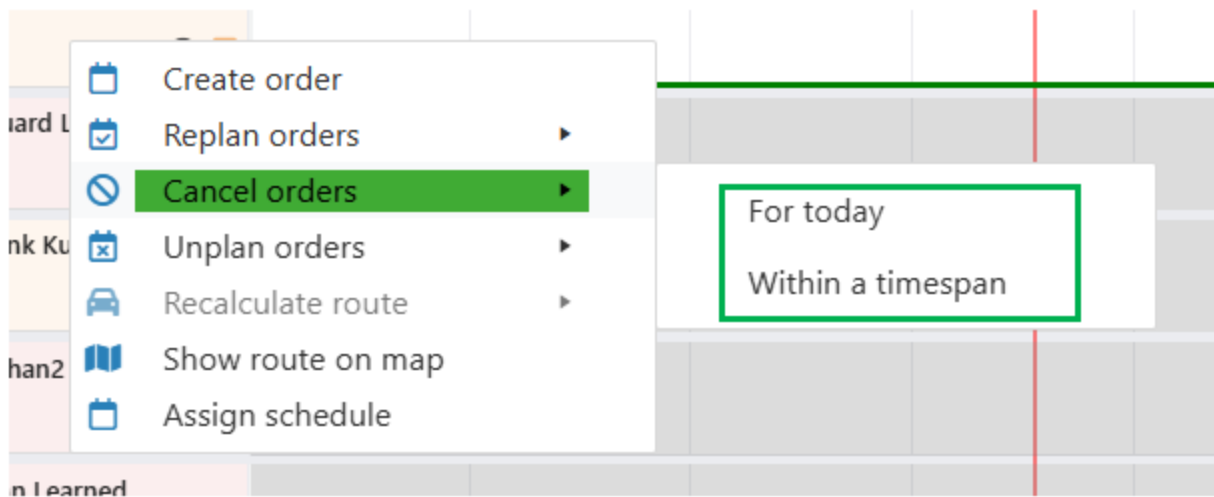
Example: **All orders for today to another engineer**

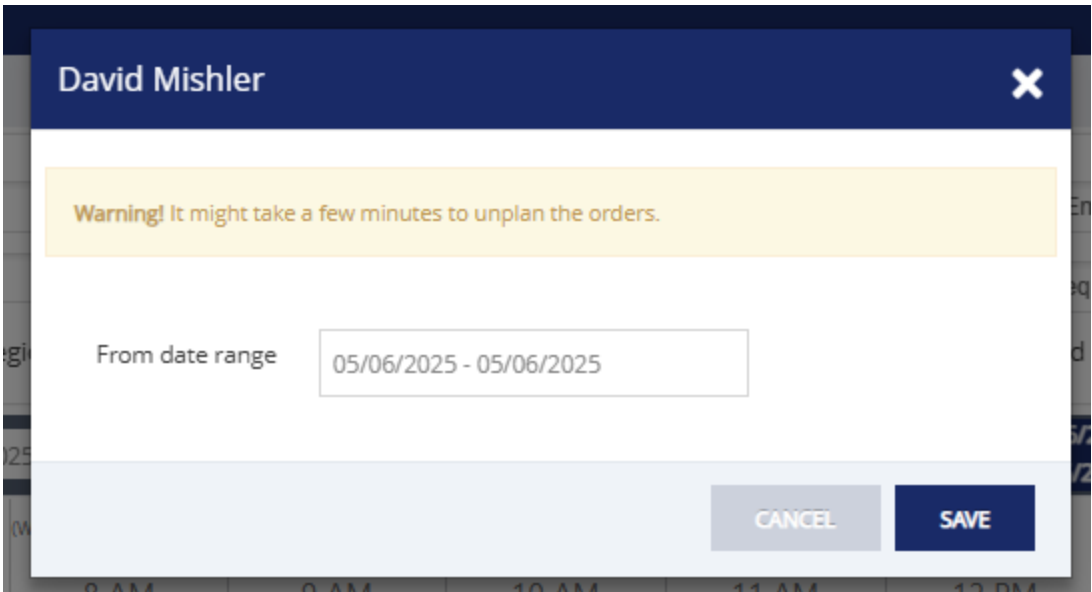


Cancel Orders

Users can cancel orders that have been assigned to engineers.

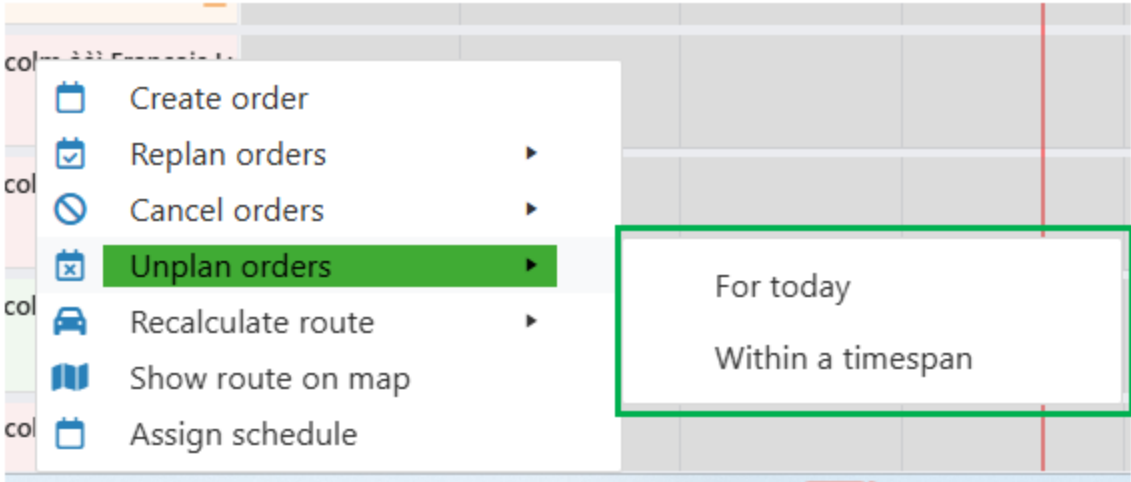
- **Today:** All orders scheduled for the current day will be cancelled.
- **Within a Timespan:** All orders scheduled within the selected date range will be cancelled.





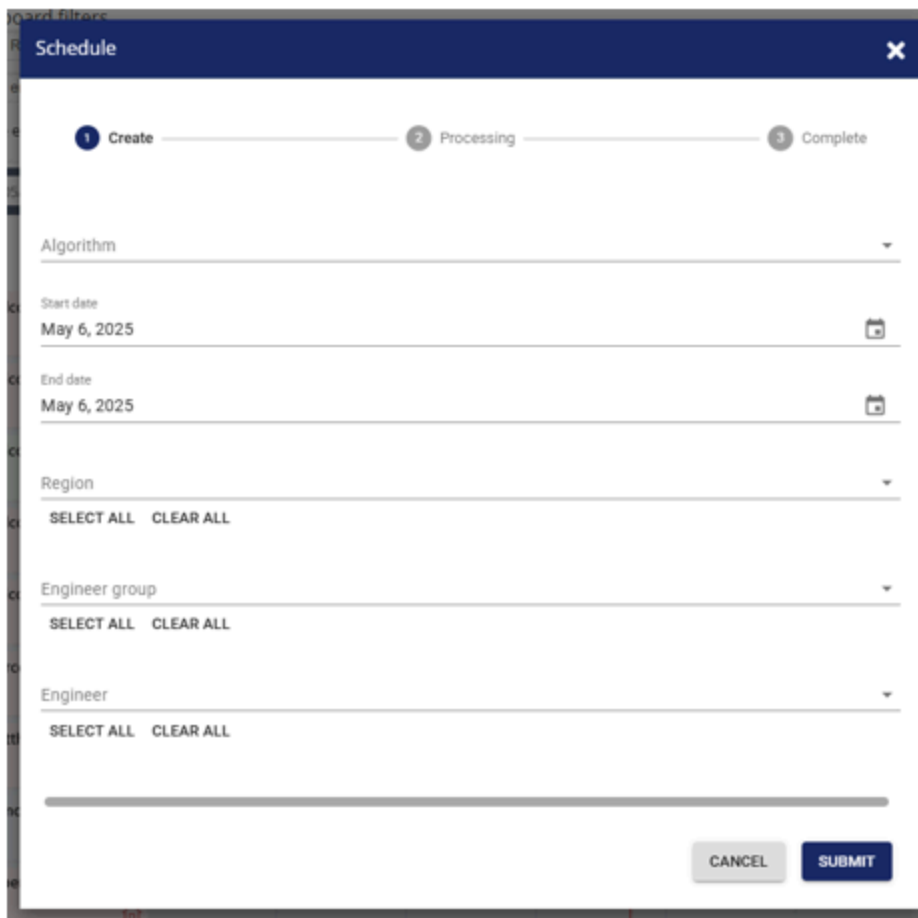
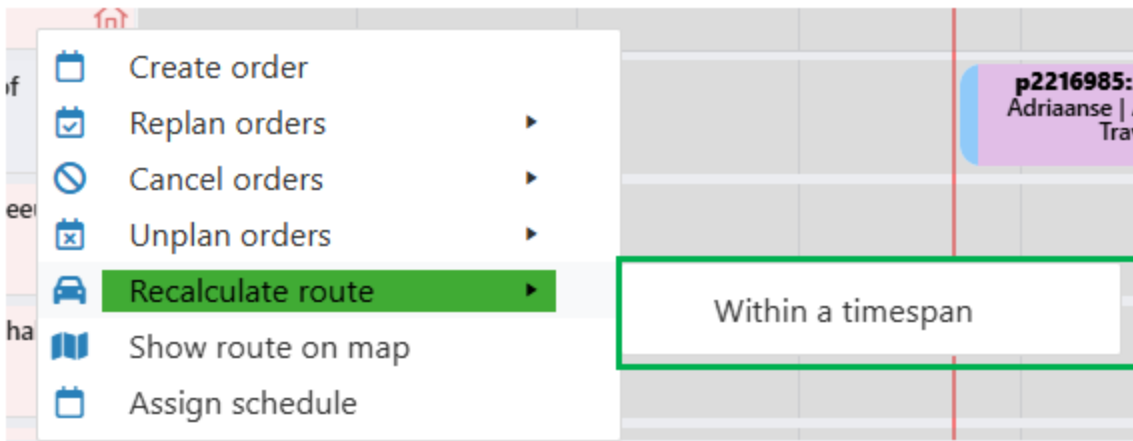
Unplan Orders

Users can unplan orders that have been assigned to engineers, either for the current day or within a selected time range. The orders are moved from a planned status to an unplanned status but are not cancelled.



Recalculate Route

Used with the automated scheduler functionality, this option allows users to adjust an engineer's route.



Show Route on Map

Opens the Planboard Map View to display the engineer's planned route.

- Create order
- Replan orders ▶
- Cancel orders ▶
- Unplan orders ▶
- Recalculate route ▶
- Show route on map
- Assign schedule



Assign Schedule

[Assigning Schedules to Engineers on the Planboard](#)