

# NDOT LUCITY WEB FLEET WORK ORDER TRAINING



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HOW TO CREATE A NEW WORK ORDER –VERSION 2019R2

AUGUST 17<sup>TH</sup>, 2020 (UPDATED 3/30/2021)

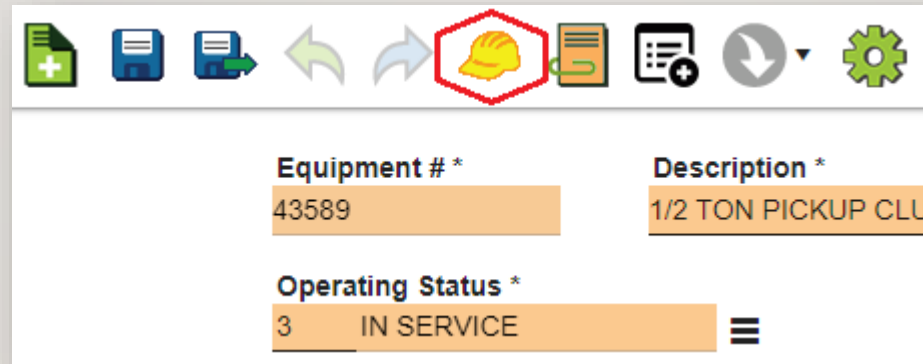
# CREATING A NEW WORK ORDER

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- You should have learned in the Lucity Web (Dashboard) Introduction & Navigation training the different ways you can look up an equipment number.
  - Use the filter in the Equipment # column. 
  - Use the Equipment Look Up on your Dashboard. This is available on the NDOT Welcome to Lucity tab which everyone should have on their dashboards.
  - OR Use the Search icon on your grid. 

# CREATE A NEW WORK ORDER

- Click the Create a New Work Order icon  on the equipment record form or from the grid.



The screenshot shows a toolbar with various icons. The icon of a yellow hard hat, representing 'Create a New Work Order', is highlighted with a red hexagon. Below the toolbar, the form displays the following fields:

<b>Equipment # *</b>	<b>Description *</b>
43589	1/2 TON PICKUP CLU
<b>Operating Status *</b>	
3 IN SERVICE	

- The Work Order Numbers are auto-generated the naming convention is Year-Month-Order #

Work Order #  
2019-06-00498

Year Month Order # 498

# CREATE A NEW WORK ORDER

- Check to make sure the correct category code is populated for your new work order and click OK.

Select options for creating a Work Order ⌵

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Create Work Order for:  Selected Record(s) (1)  Filtered Records

Category Code  Grand Island 30 - Share  Limit to Selected Category

Template Code	Template Type
No records available.	

⏪ Page 0 of 0 ⏩ 0 - 0 of 0 items

# CREATING A NEW WORK ORDER

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- Click OK if the message below appears.

Continue with Creation?

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One or more of the selected assets are already attached to an open Work Order. Would you like to include the assets on the new work order anyway? (Assets not already on an open Work Order will be added either way.)

- Select your view – You will want to select the Fleet WO View

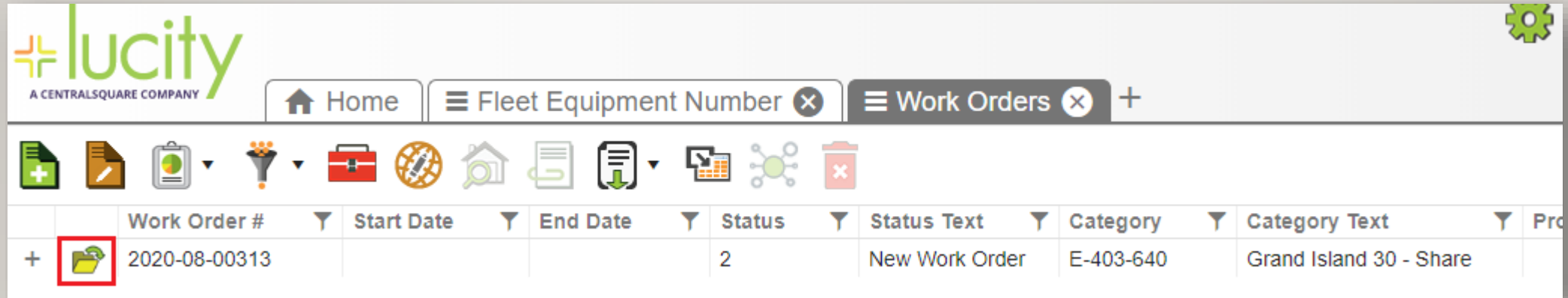
Please select a view

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#Read Only WO Form Completion  
Facility WO Grid  
Fleet WO View  
NDOR Facility WOs  
Work Order\_Full

# CREATE A NEW WORK ORDER

- Click on the folder icon to open the work order form to fill in the required work order fields on the form.



The screenshot shows the Lucity software interface. The top navigation bar includes the Lucity logo (A CENTRAL SQUARE COMPANY), a Home button, a Fleet Equipment Number button, and a Work Orders button. Below the navigation bar is a toolbar with various icons. The main content area displays a table of work orders. The first row of the table has a folder icon in the first column, which is highlighted with a red box. The table columns are: Work Order #, Start Date, End Date, Status, Status Text, Category, Category Text, and Pro.


	Work Order #	Start Date	End Date	Status	Status Text	Category	Category Text	Pro
+	2020-08-00313			2	New Work Order	E-403-640	Grand Island 30 - Share	

# CREATE A NEW WORK ORDER

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- Any field with an asterisk next to it is required and needs to be completed.
- Fill out the information in the Cause, Supervisor, Lead Worker, Priority, and Reason fields.
- Fill out the information for the Problem and Main Task fields.
- Fill out the Assigned Date field.
- Work Order Comment box – any work that was completed on the vehicle is explained here.
- For an ad hoc work order created for unplanned maintenance the Reason Field would be Unplanned. For work orders that are generated from a PM the Reason field is required to be Planned.
- This Fleet WO View form was created so you can only see the fields that you need to fill out for your work orders.

# Fleet WO View

 **Lucity**  
A CENTRAL SQUARE COMPANY

Home | Fleet Equipment Number | Work Orders | Fleet WO Form

Navigation icons: Add, Save, Refresh, Undo, Redo, Print, Calendar, Download, Settings

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<b>Work Order #</b> 2020-08-00313	<b>Category *</b> E-403-640 Grand Island 30 - Share
<b>Status</b> 2 New Work Order	<b>Problem *</b>
<b>Status Date</b> 8/17/2020	<b>Asset Number</b> 43589
<b>Main Task *</b>	

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<b>Cause *</b>	<b>Assigned By</b>
<b>Supervisor *</b>	<b>Assigned Date</b> <b>Start Date</b> <b>End Date</b>
<b>Lead Worker *</b>	<b>Comment</b>
<b>Priority *</b> 2 Medium	
<b>Reason *</b> 2 Unplanned	


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<b>Last Modified By</b> Jacey.Schmidt	<b>Last Modified Date</b> 8/17/2020
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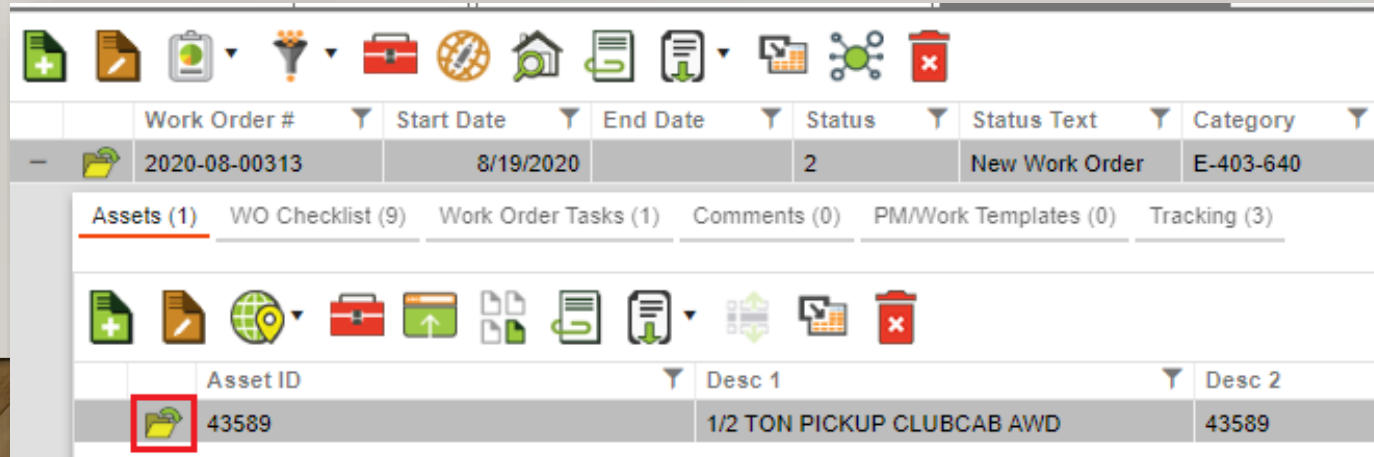
# CREATE A NEW WORK ORDER

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- How to Complete the Work Order on the Work Order form
  - Click on the status field picklist and select **Complete**. Don't forget to enter the end date for the work order. It is important the start date and end date are reflective of the time spent on the work associated with the work order so Operations Fleet Management can produce a more accurate downtime report. It is also very important that you close/complete the work orders, so the PM schedules remain current for the equipment. Save & Close when you are finished. 

# CREATE A NEW WORK ORDER - ASSETS TAB

- How to enter the labor hours and material costs on the work orders:
- Click on the gray plus sign next to your work order record.
- Click on the **Assets** tab, click the folder icon to open the form so you can fill in the completion date, odometer and/or hourmeter fields, then Save & Close. It is very **IMPORTANT** that you complete these fields as this data is what updates the Eval section on the Fleet record. This data is used by Fleet Management in Operations for reporting and budgeting.



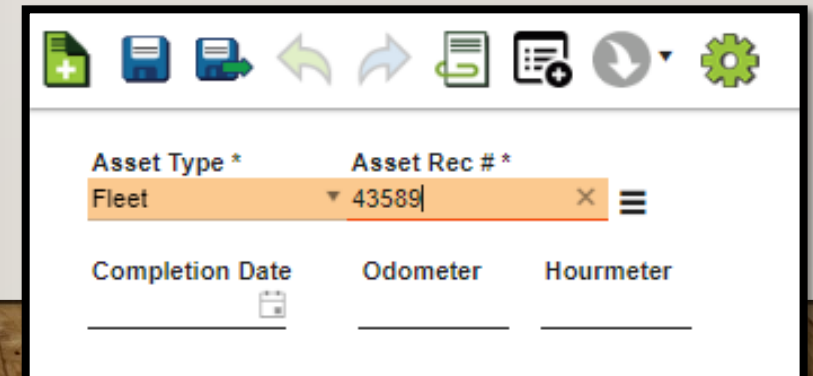
The screenshot shows a software interface with a toolbar at the top containing various icons. Below the toolbar is a table with the following data:

Work Order #	Start Date	End Date	Status	Status Text	Category
2020-08-00313	8/19/2020		2	New Work Order	E-403-640

Below the table are several tabs: **Assets (1)**, WO Checklist (9), Work Order Tasks (1), Comments (0), PM/Work Templates (0), and Tracking (3). The **Assets (1)** tab is selected. Below the tabs is another toolbar with icons. Below that is another table with the following data:

Asset ID	Desc 1	Desc 2
43589	1/2 TON PICKUP CLUBCAB AWD	43589

A red box highlights a folder icon next to the Asset ID 43589 in the second table.



The screenshot shows a software interface with a toolbar at the top containing various icons. Below the toolbar is a form with the following fields:













**Asset Type \*** Fleet  
**Asset Rec # \*** 43589

Below these fields are three input fields: **Completion Date**, **Odometer**, and **Hourmeter**.

# CREATE A NEW WORK ORDER – WO CHECKLIST TAB








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- Click on the **WO Checklist** tab
- Select the checklist items (events) that were completed. Open the checklist item form by clicking on the folder icon to check the complete box and fill in the complete date. Save & close. There may be several pages of checklist items.
- If needed, you can add additional items to the checklist by clicking on the Add Record icon (green paper white plus sign).









Work Order #	Start Date	End Date	Status	Status Text	Category
2020-08-00313	8/19/2020		2	New Work Order	E-403-640





Assets (1) WO Checklist (9) Work Order Tasks (1) Comments (0) PM/Work Templates (0) Tracking (3)










No	Checklist	Completed	Completion Date
1	Heating and Air Conditioning	<input type="checkbox"/>	
2	Body Work	<input type="checkbox"/>	
3	Glass	<input type="checkbox"/>	
4	Doors	<input type="checkbox"/>	
5	Wipers	<input type="checkbox"/>	
6	Seats	<input type="checkbox"/>	

Page 1 of 1  items per page

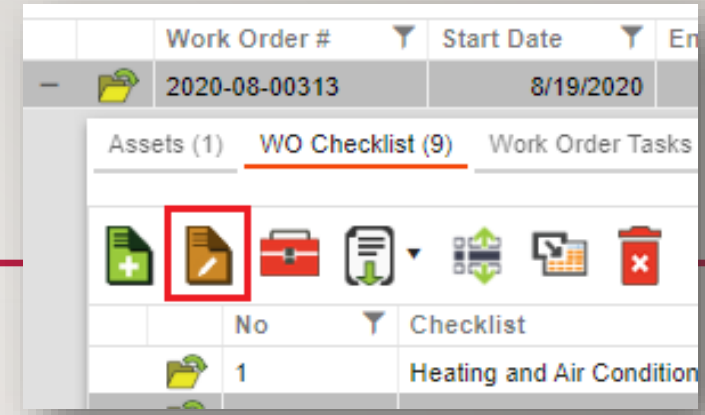










 2 of 9 


Checklist	Completed	Completion Date
Body Work	<input checked="" type="checkbox"/> Completed	8/19/2020 

# CREATE A NEW WORK ORDER – WO CHECKLIST TAB


- **WO Checklist** tab editing
- Click on the **Edit in Grid** Icon (brown paper) to quickly update the completed checkboxes for each row and the completion dates on the WO checklist grid. Click the Save icon to save your changes and exit this screen. If this icon is not present for you contact Lucy Support and we can grant you the proper security permissions to help you do your job easier.



Work Order #	Start Date	End Date	Asset ID	Statu
2020-08-00313	8/19/2020		43589	2
Assets (1) <u>WO Checklist (9)</u> Work Order Tasks (1) Comments (0) PM/Work Templates (0) Tracking (3)				
[Toolbar: Green Plus, Red X, Blue Document, Green Arrow, Blue Arrow, Red Trash]				
No	Checklist	Completed	Completion Date	
1	Heating and Air Conditioning	<input checked="" type="checkbox"/>	8/19/2020	[Calendar Icon]
2	Body Work	<input checked="" type="checkbox"/>	8/19/2020	[Calendar Icon]
3	Glass	<input checked="" type="checkbox"/>	8/19/2020	[Calendar Icon]
4	Doors	<input checked="" type="checkbox"/>	8/19/2020	[Calendar Icon]
5	Wipers	<input type="checkbox"/>		[Calendar Icon]
6	Seats	<input type="checkbox"/>		[Calendar Icon]

# CREATE A NEW WORK ORDER – WO CHECKLIST TAB

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- **WO Checklist** tab editing
- Another way to update the WO checklist items. Highlight the row (press the Ctrl key to highlight multiple rows) you need to update on the WO checklist. Click on the toolkit icon  to update the Completed and Completion Date fields for the checklist. Select the **Populate Complete Date | Selected Record(s)** tool option to complete the WO checklist fields.

# Populate Complete Date | Selected Record(s) – WO Checklist tool

The screenshot shows a software interface for a work order checklist. At the top, there is a toolbar with various icons. Below the toolbar, a summary bar displays: Work Order # 2020-08-00313, Start Date 8/19/2020, End Date, Asset ID 43589, and Status 2. Below this, there are tabs for Assets (1), **WO Checklist (9)**, Work Order Tasks (1), Comments (0), PM/Work Templates (0), and Tracking (3). The main area contains a checklist table with columns for 'Completed' and 'Completion Date'. A context menu is open over the table, showing two options: 'Load Checklist From Task' and 'Populate Complete Date | Selected Record(s)'. The table data is as follows:

No	Completed	Completion Date
1	<input type="checkbox"/>	
2	<input checked="" type="checkbox"/>	8/19/2020
3	<input type="checkbox"/>	
4	<input type="checkbox"/>	
5	<input type="checkbox"/>	
6	<input type="checkbox"/>	

At the bottom, there is a pagination bar showing 'Page 1 of 1' and '10 items per page'.

The screenshot shows a dialog box titled 'Populate Complete Date | Selected Record(s)'. It contains the following fields and controls:

- Completion Date: 8/19/2020
- Completion Time: 4:23 PM
- Condition: Code
- Type: [empty]
- Completed
- Don't Change Completed Checkbox
- Buttons: Cancel, Ok

# CREATE A WORK ORDER – WORK ORDER TASKS TAB

- Next, click on the **Work Order Tasks** tab.
- Click on the folder icon to open the form to enter the task start and end date. If there is not a task there you will need to click on the green paper Add a Record icon to add the task you need. Save & Close.

The screenshot shows the 'Work Order Tasks' tab selected in a software interface. The top toolbar contains various icons for file operations and navigation. Below the toolbar, a table displays work order details:

Work Order #	Start Date	End Date	Asset ID
2020-08-00313	8/19/2020		43589

Below the table, there are tabs for 'Assets (1)', 'WO Checklist (9)', 'Work Order Tasks (1)', 'Comments (0)', 'PM/Work Templates (0)', and 'Tracking'. The 'Work Order Tasks (1)' tab is active. A second toolbar is visible above the task list. The task list table is as follows:

Task	Task Text	Start Date	End Date
E02	Body		

The screenshot shows the task form for the task 'E02'. The form has a title bar 'Task \*' with a close button and a menu icon. The main content area contains the following fields:

- Task \***: E02 (with a close button and a menu icon)
- Task Start Date \***: A date picker field.
- Task End Date \***: A date picker field.



# CREATE A WORK ORDER – WORK ORDER TASKS TAB

- Click on the gray plus sign to enter the data for your resources.
- Click on the Resource Type tab you want to enter data for.

Employees (0) Materials (0) Fluids (0) Contractors (0)

Work Order #	Start Date	End Date	Asset ID
2020-08-00313	8/19/2020		43589

Assets (1) | WO Checklist (9) | Work Order Tasks (1) | Comments (0) | PM/Work Templates (0) | Tracking (3)

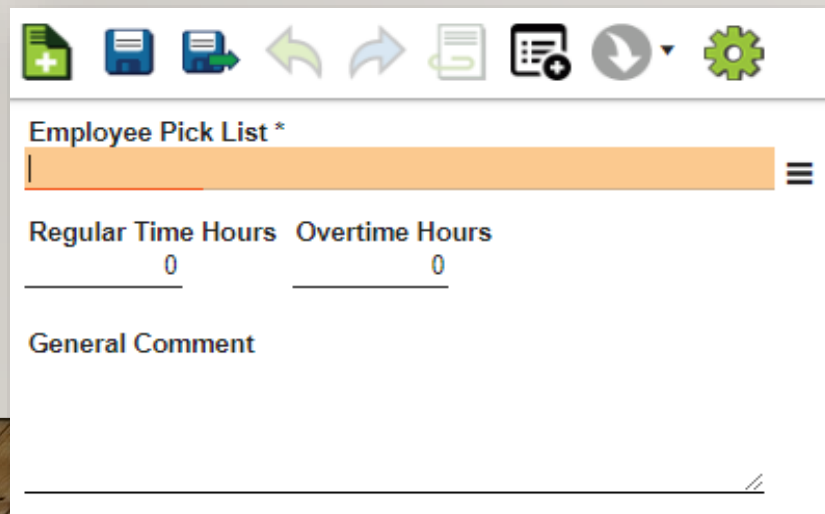
Task	Task Text	Start Date	End Date
E02	Body		

Employees (0) | Materials (0) | Fluids (0) | Contractors (0)

Resource	Resource Text	Regular Time Hours	Overt
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# CREATE A WORK ORDER – WORK ORDER TASKS TAB

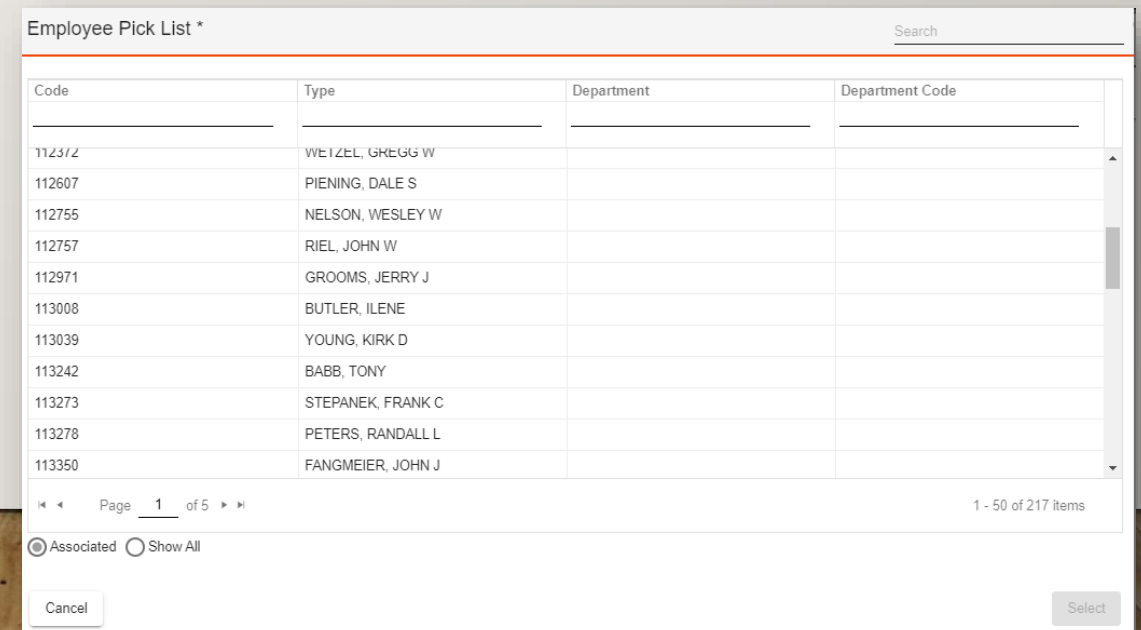
- For this example, I have selected Employees. To add an employee, click on the Add a New Record icon (green paper) from the Resource Type grid. Select the appropriate employee from the picklist. You can search faster by typing in the name in the Type search box.
- Fill in the appropriate Regular Time Hours field. **NEVER** fill in the Overtime Hours field. Save & Close when done.



Employee Pick List \*

Regular Time Hours  Overtime Hours

General Comment



Employee Pick List \* Search

Code	Type	Department	Department Code
112372	WETZEL, GREGG W		
112607	PIENING, DALE S		
112755	NELSON, WESLEY W		
112757	RIEL, JOHN W		
112971	GROOMS, JERRY J		
113008	BUTLER, ILENE		
113039	YOUNG, KIRK D		
113242	BABB, TONY		
113273	STEPANEK, FRANK C		
113278	PETERS, RANDALL L		
113350	FANGMEIER, JOHN J		

Page 1 of 5

1 - 50 of 217 items

Associated  Show All

Cancel Select

# CREATE A WORK ORDER – WORK ORDER TASKS TAB

- Let's add another resource!!
- Select the Resource Type tab of Materials. Click the Add a new Record icon (green paper) to add the material resource.

The screenshot displays a software interface for managing work orders. At the top, a table shows work order details: Work Order # 2020-08-00313, Start Date 8/19/2020, End Date, and Asset ID 43589. Below this, a navigation bar includes tabs for Assets (1), WO Checklist (9), Work Order Tasks (1), Comments (0), PM/Work Templates (0), and Tracking (3). The 'Work Order Tasks' tab is active, showing a table with columns for Task, Task Text, Start Date, and End Date. A single task is listed: E02 with the text 'Body'. Below the task table, there are sub-tabs for Employees (0), Materials (0), Fluids (0), and Contractors (0). The 'Materials' sub-tab is selected, and its toolbar contains an 'Add a new Record' icon (green paper) which is highlighted. Other icons in the toolbar include a document, a truck, a first aid kit, a house, a document with a download arrow, a network diagram, and a trash can. Below the sub-tab toolbar, a table header for 'Materials' is visible with columns for Resource, Resource Text, and Alt Description.

Work Order #	Start Date	End Date	Asset ID
2020-08-00313	8/19/2020		43589


Assets (1) | WO Checklist (9) | **Work Order Tasks (1)** | Comments (0) | PM/Work Templates (0) | Tracking (3)

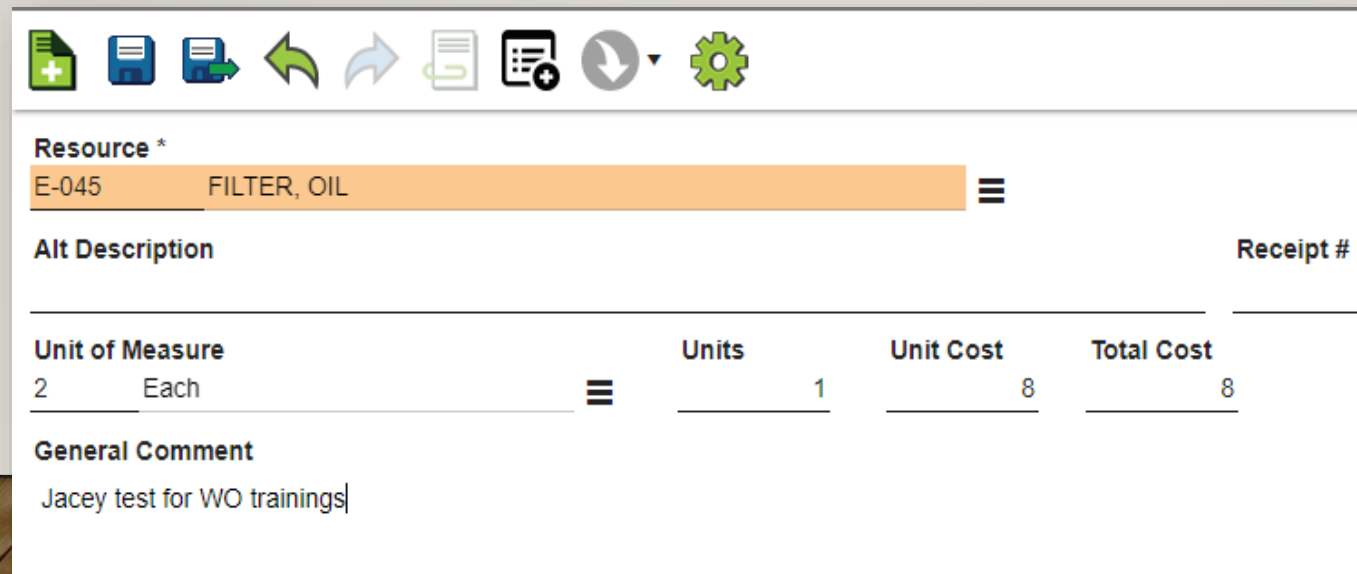
Task	Task Text	Start Date	End Date
E02	Body		

Employees (0) | **Materials (0)** | Fluids (0) | Contractors (0)

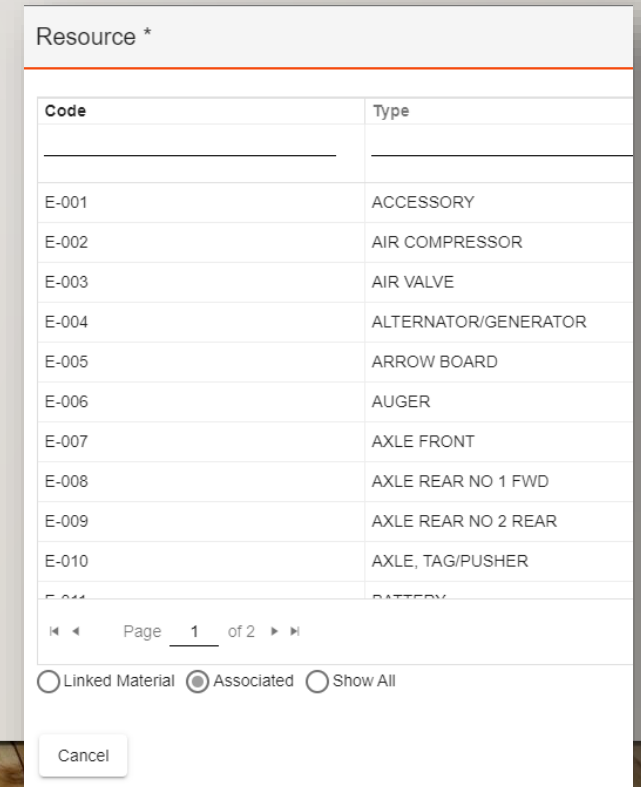
Resource	Resource Text	Alt Description
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# CREATE A WORK ORDER – WORK ORDER TASKS TAB

- Select the appropriate Material Resource from the picklist.
- Click on the Unit of Measure picklist and choose the appropriate item
- For Resource Type of Material, Fluid or Contractor you will need to fill in a dollar amount in the Unit Cost field. Save & Close when done. 



The screenshot shows the 'Resource \*' selection screen. At the top, there is a toolbar with icons for adding, saving, undo, redo, and settings. Below the toolbar, the 'Resource \*' section is highlighted in orange and contains the text 'E-045 FILTER, OIL'. Below this, there is a table with columns for 'Alt Description' and 'Receipt #'. The table is currently empty. Below the table, there is a section for 'Unit of Measure' with a dropdown menu showing '2 Each' and a 'Units' field with the value '1'. To the right, there are 'Unit Cost' and 'Total Cost' fields, both with the value '8'. At the bottom, there is a 'General Comment' field with the text 'Jacey test for WO trainings|'.



The screenshot shows the 'Resource \*' picklist. It is a table with two columns: 'Code' and 'Type'. The table contains the following data:

Code	Type
E-001	ACCESSORY
E-002	AIR COMPRESSOR
E-003	AIR VALVE
E-004	ALTERNATOR/GENERATOR
E-005	ARROW BOARD
E-006	AUGER
E-007	AXLE FRONT
E-008	AXLE REAR NO 1 FWD
E-009	AXLE REAR NO 2 REAR
E-010	AXLE, TAG/PUSHER
E-011	BATTERY

At the bottom of the picklist, there is a pagination control showing 'Page 1 of 2' and three radio buttons: 'Linked Material', 'Associated' (which is selected), and 'Show All'. A 'Cancel' button is located at the bottom right of the picklist.

# QUESTIONS

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- Contact the NDOT Lucity Support team if you have any questions.
- Jacey Schmidt, IT Business Systems Analyst Supervisor (402)479-3756  
[jacey.schmidt@nebraska.gov](mailto:jacey.schmidt@nebraska.gov)
- Sandy Forsgren, IT Business Systems Analyst (402)479-4504  
[sandy.forsgren@nebraska.gov](mailto:sandy.forsgren@nebraska.gov)
- Timothy Foss, Engineer IV (402)479-3597 [timothy.foss@nebraska.gov](mailto:timothy.foss@nebraska.gov)

**THANK YOU!!**

