NDOT LUCITY WEB FLEET WORK ORDER TRAINING

HOW TO CREATE A NEW WORK ORDER – VERSION 2019R2

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

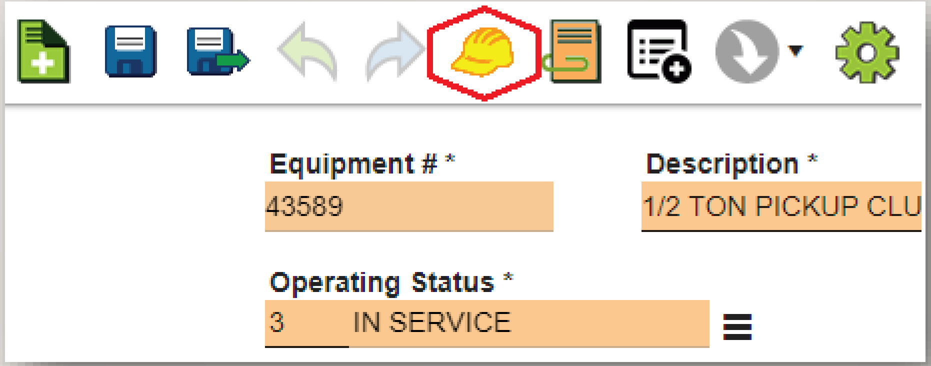
CREATING A NEW WORK ORDER

- 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. 

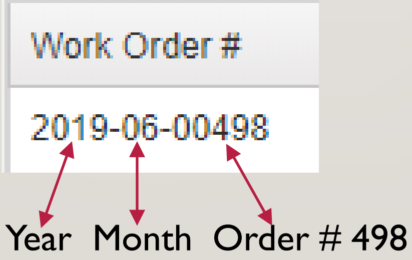
  - Use the Equipment Look Up on your Dashboard. This is available on the NDOT Welcome to Lucity tab which everyone should have on their dashboards.
  - OR Use the Search icon on your grid. 

CREATE A NEW WORK ORDER

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

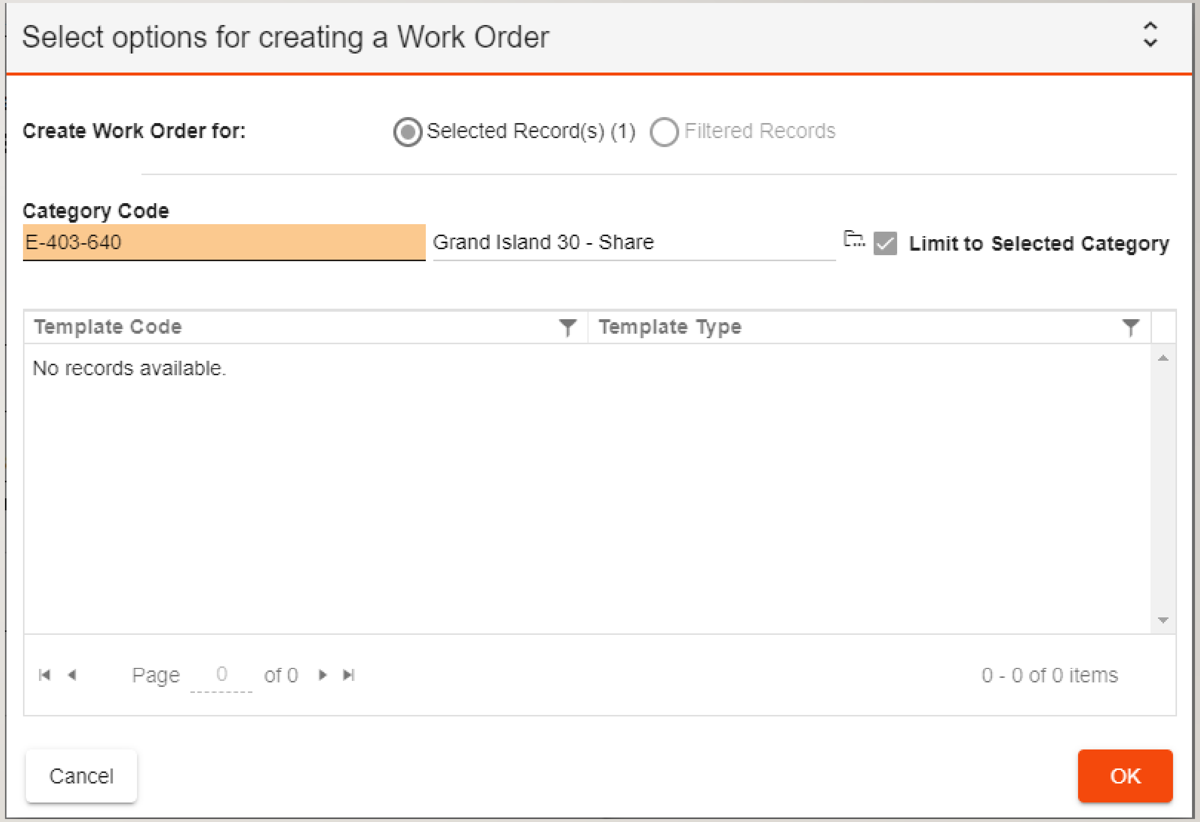


- The Work Order Numbers are auto-generated the naming convention is Year-Month-Order #



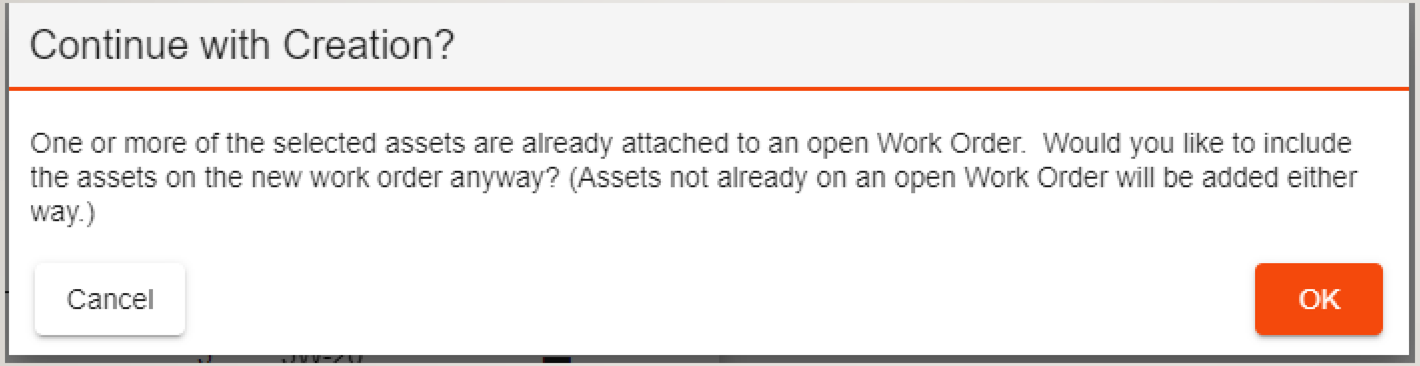
CREATE A NEW WORK ORDER

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

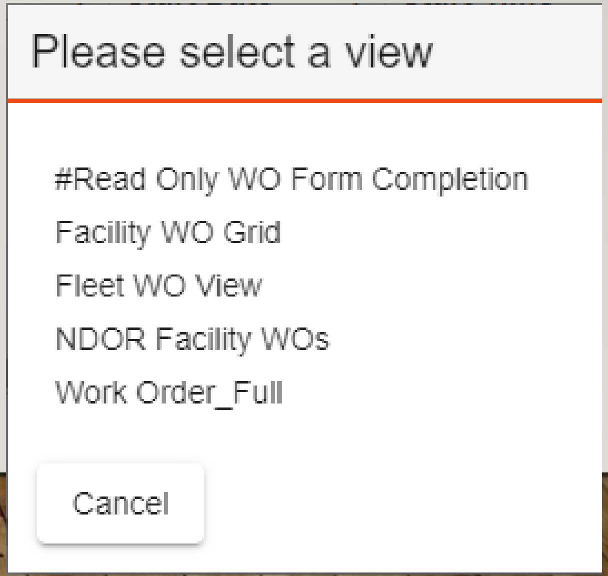


CREATING A NEW WORK ORDER

- Click OK if the message below appears.

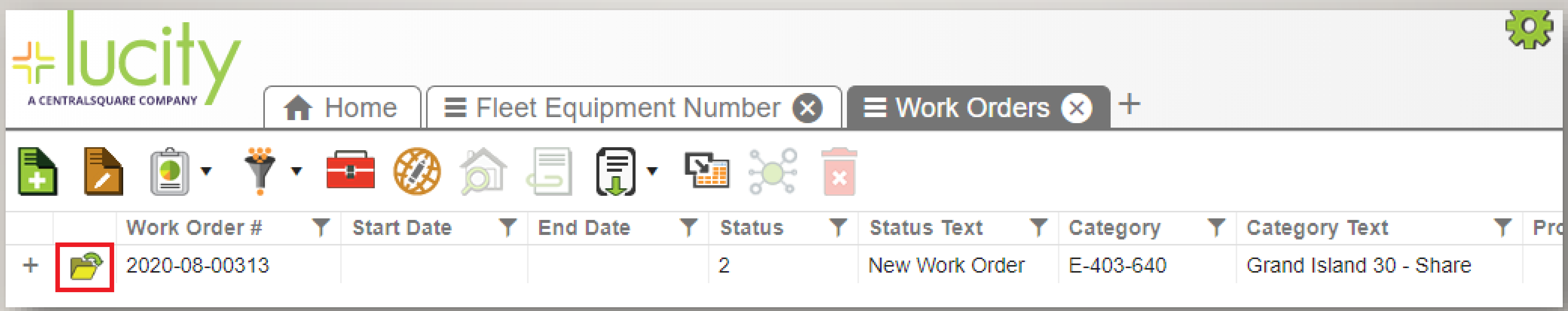


- Select your view – You will want to select the Fleet WO View



CREATE A NEW WORK ORDER

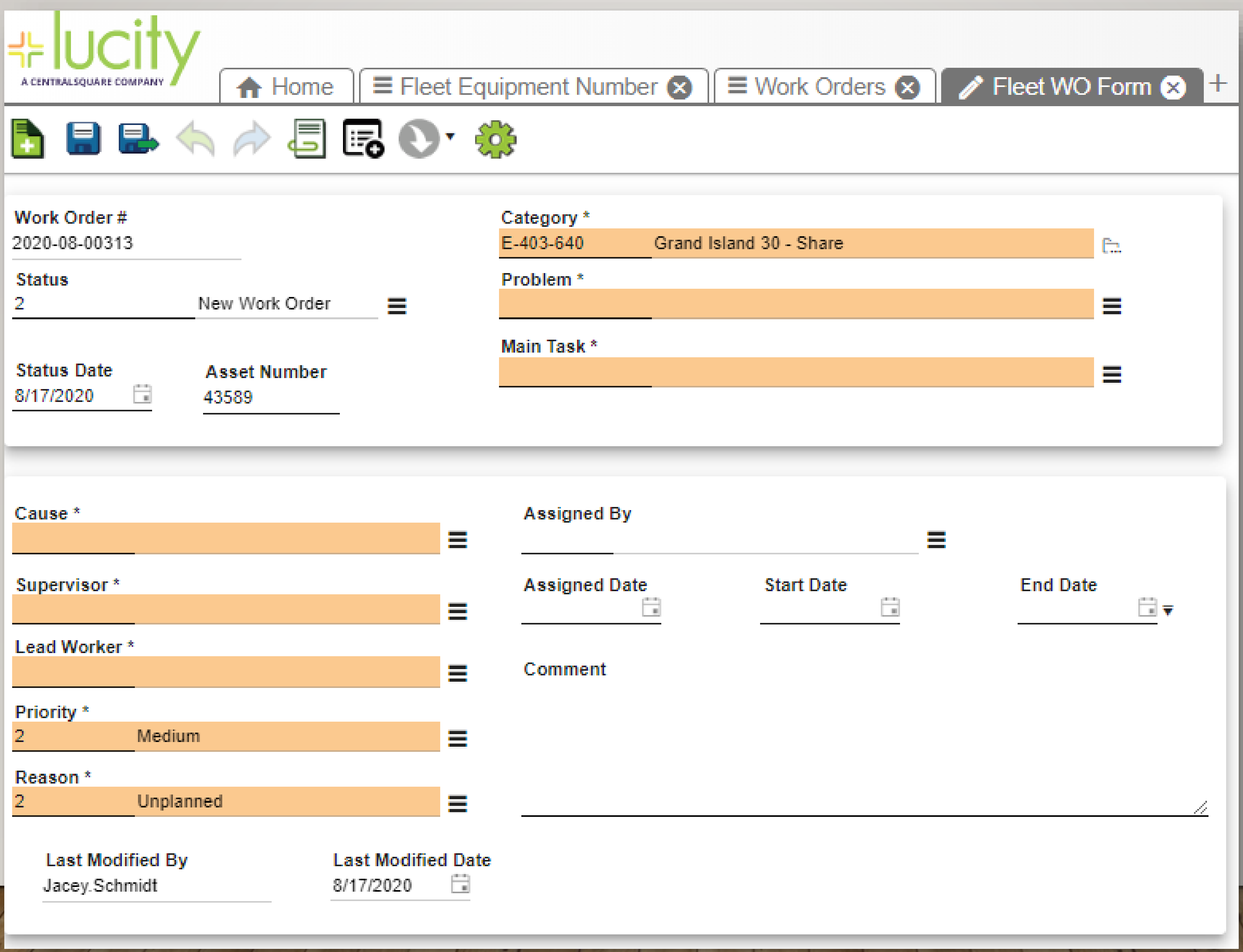
- Click on the folder icon to open the work order form to fill in the required work order fields on the form.



CREATE A NEW WORK ORDER

- 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

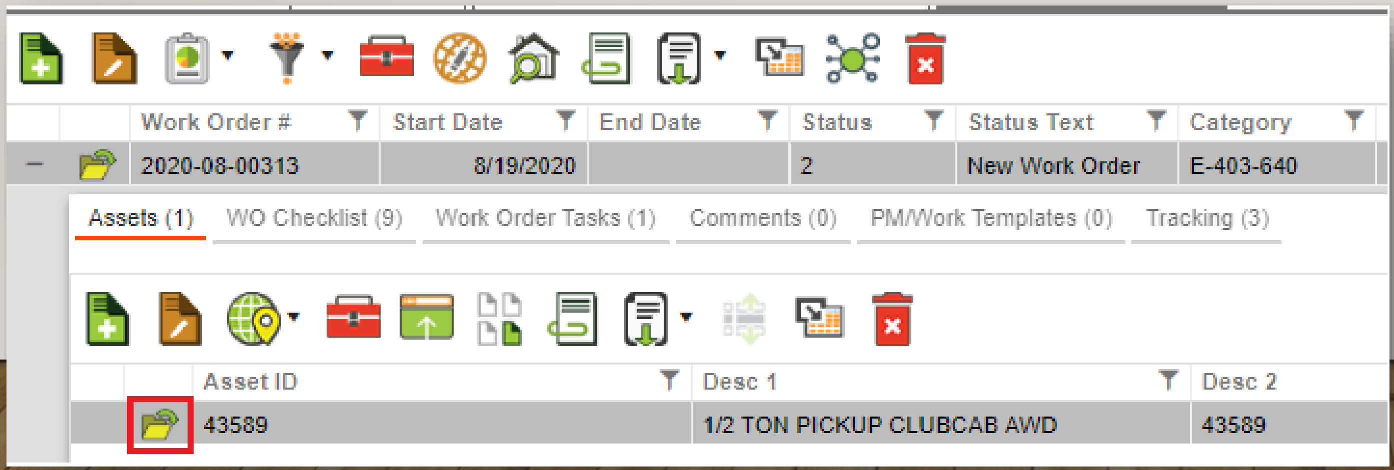


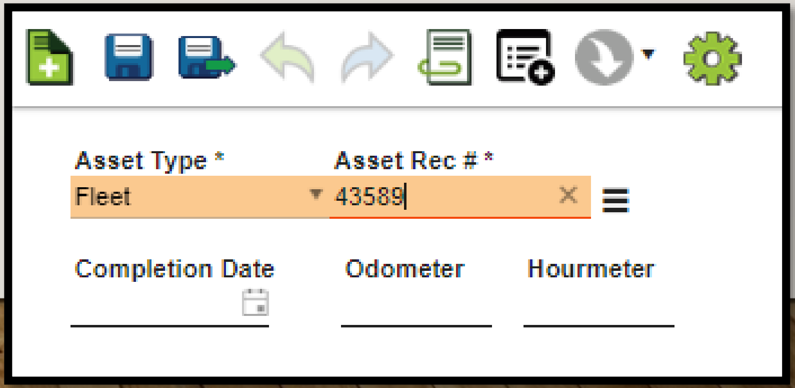
CREATE A NEW WORK ORDER

- 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

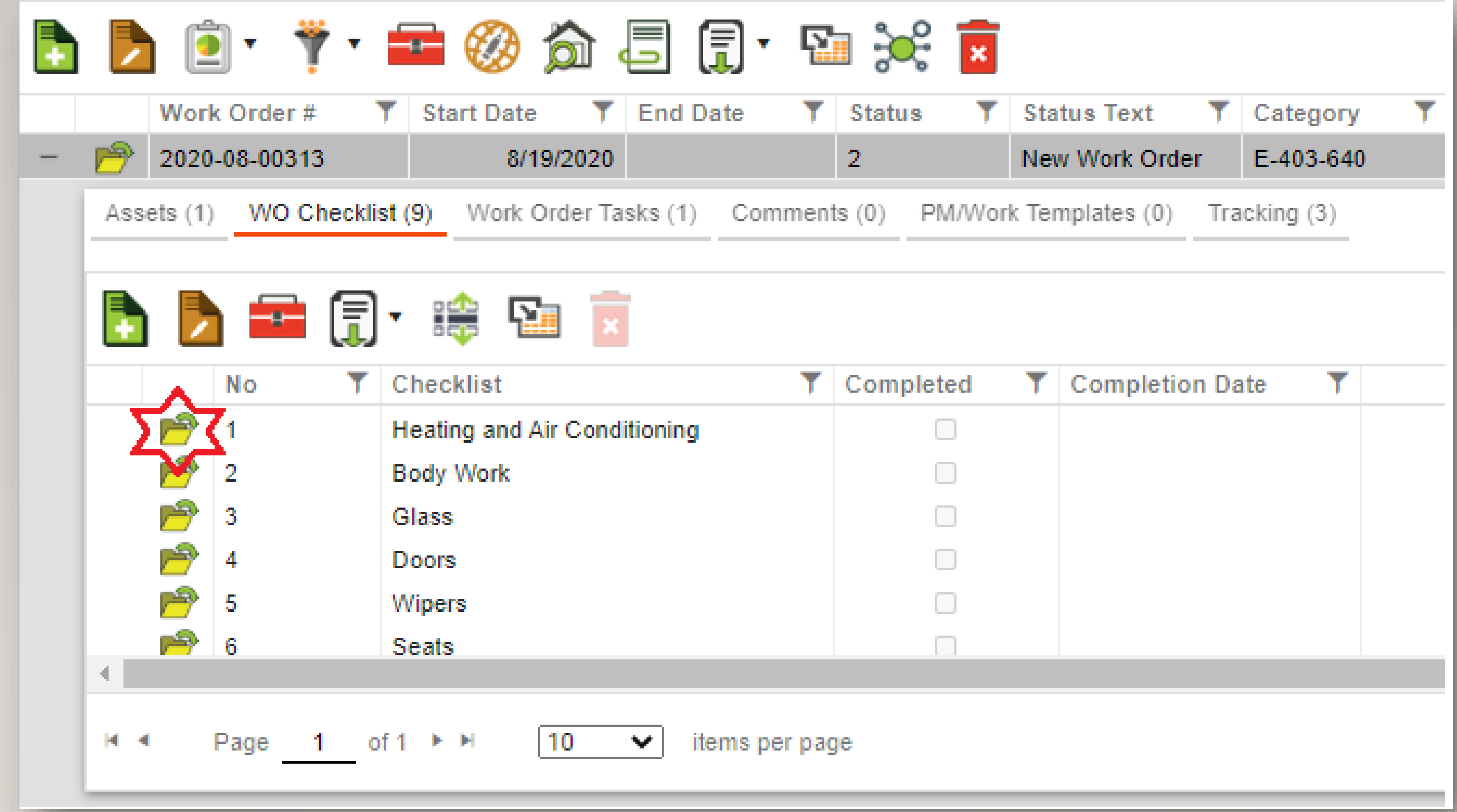
- How to enter the labor hours and material costs on the work orders:
- Click on the gray plus sign next to your work order record.
- Click on the **Assets** tab, click the folder icon to open the form so you can fill in the completion date, odometer and/or hourmeter fields, then Save & Close. It is 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.

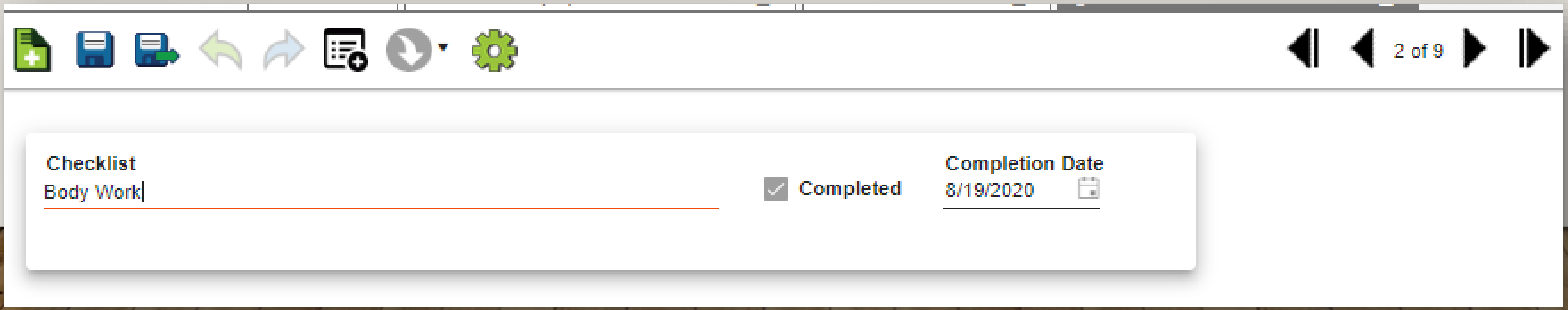




CREATE A NEW WORK ORDER – WO CHECKLIST TAB

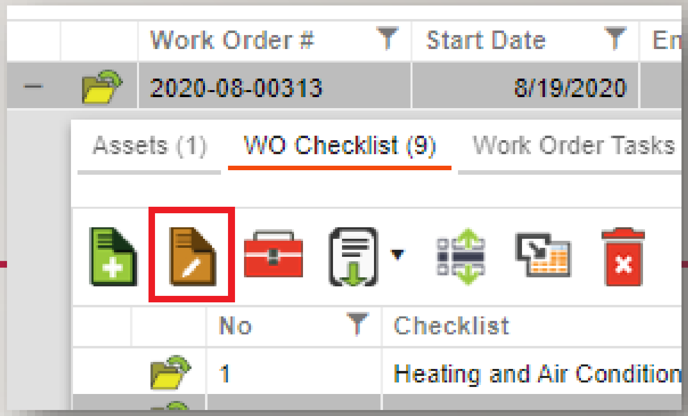
- Click on the **WO Checklist** tab
- Select the checklist items (events) that were completed. Open the checklist item form by clicking on the folder icon to check the complete box and fill in the complete date. Save & close. There may be several pages of checklist items.
- If needed, you can add additional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

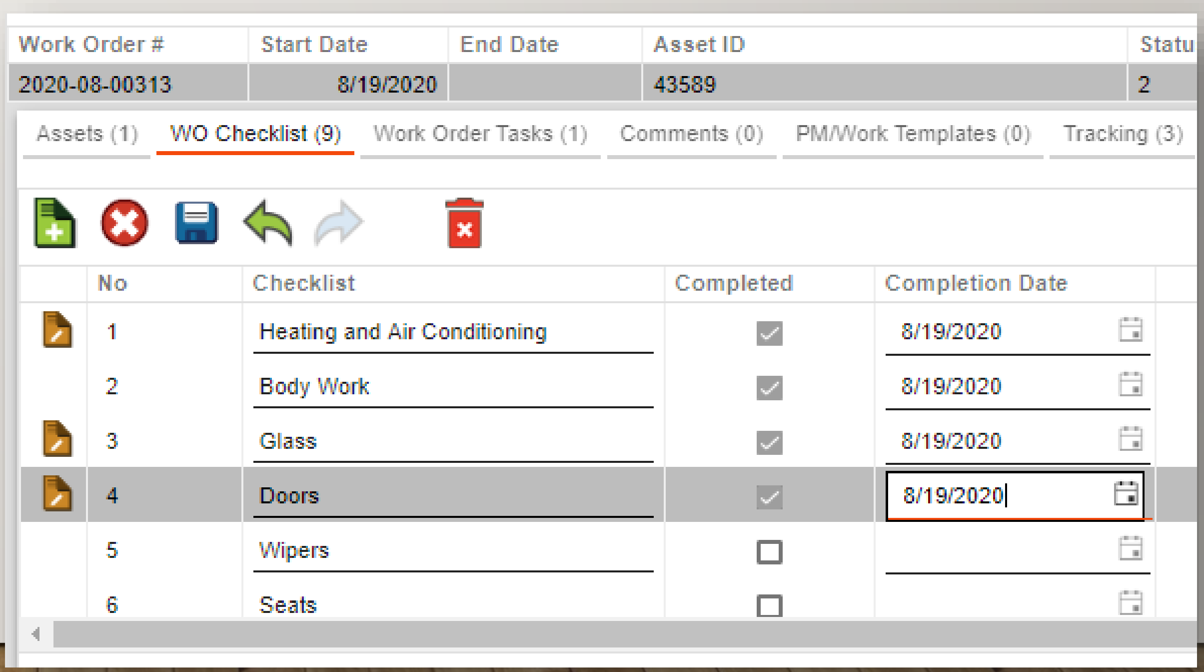

Work Order #
Start Date
End Date
Status
Status Text
Category
2020-08-00313
8/19/2020
2
New Work Order
E-403-640
Assets (1)
WO Checklist (9)
Work Order Tasks (1)
Comments (0)
PM/Work Templates (0)
Tracking (3)
No
Checklist
Completed
Completion Date
1
Heating and Air Conditioning
2
Body Work
3
Glass
4
Doors
5
Wipers
6
Seats
Page
1
of 1
10
items per page


2 of 9
Checklist
Body Work
Completed
Completion Date
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 Lucity Support and we can grant you the proper security permissions to help you do your job easier.

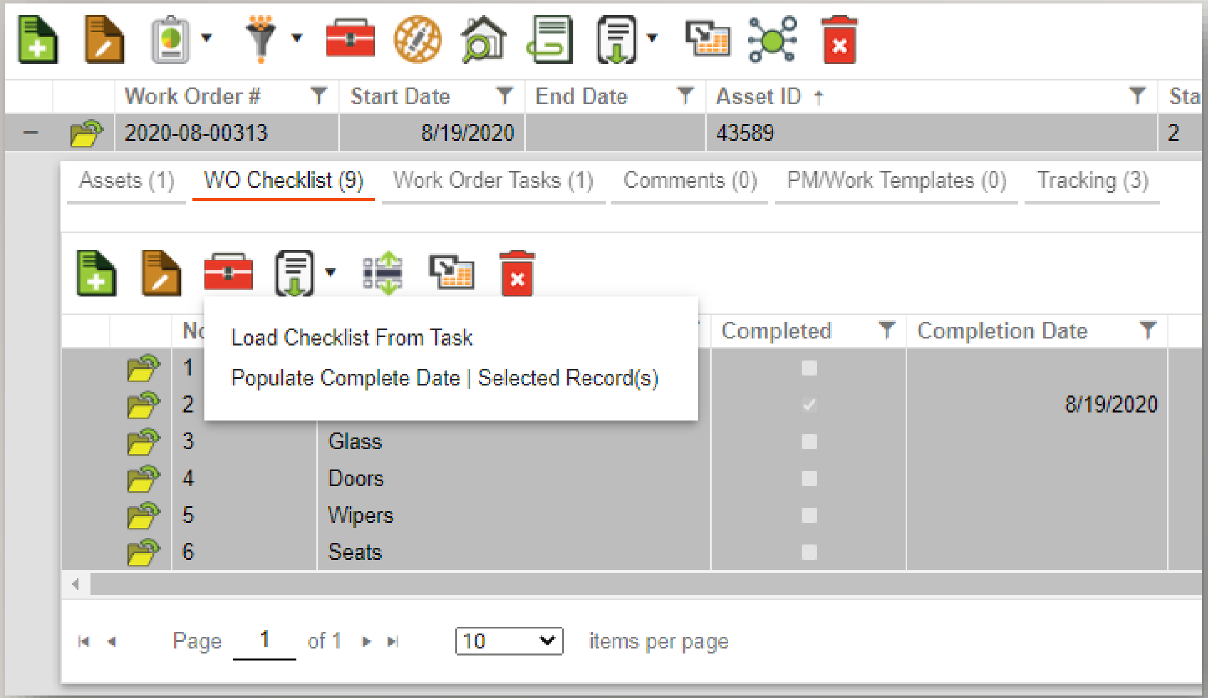


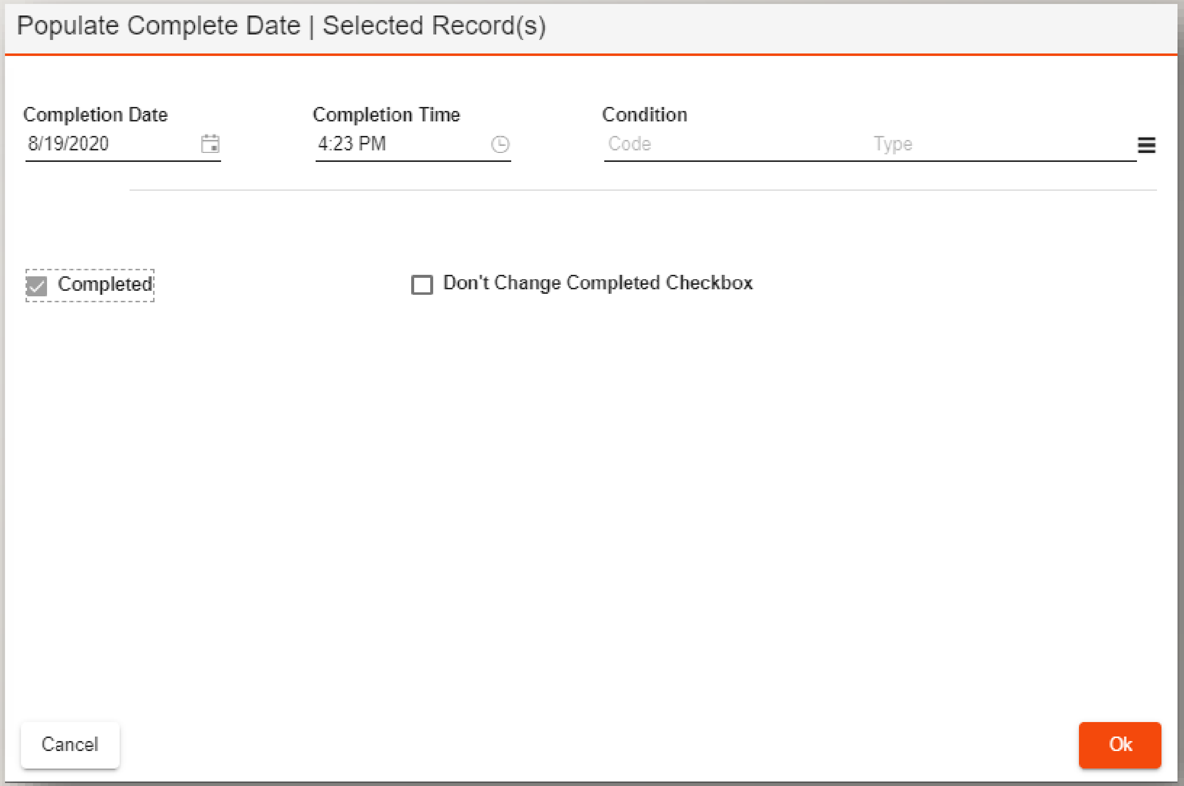


CREATE A NEW WORK ORDER – WO CHECKLIST TAB

- **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.

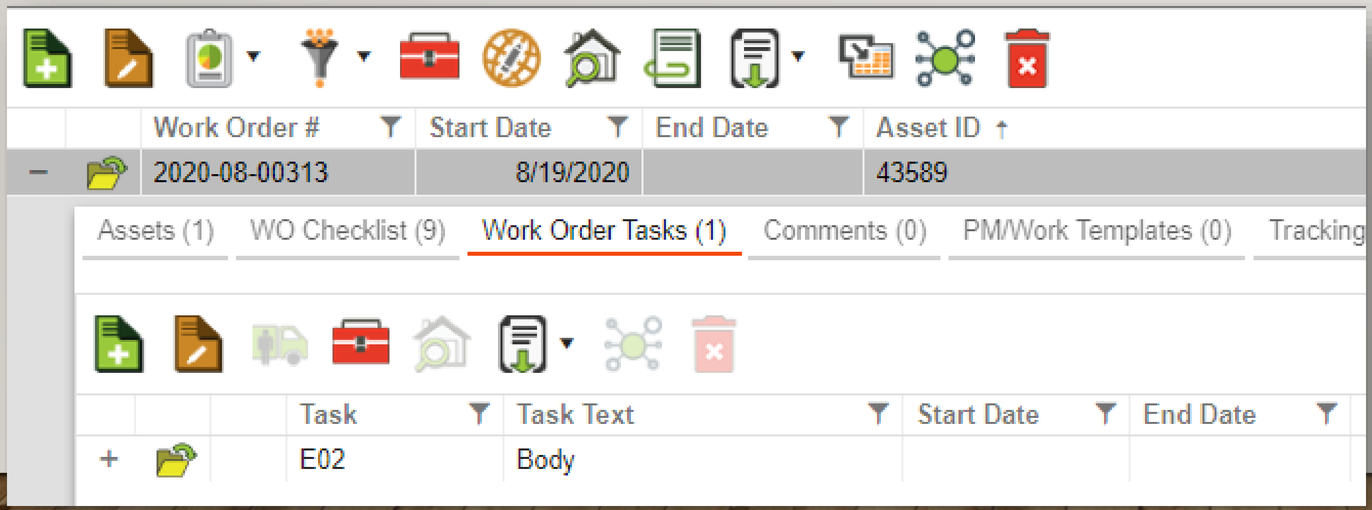
Populate Complete Date | Selected Record(s) – WO Checklist tool

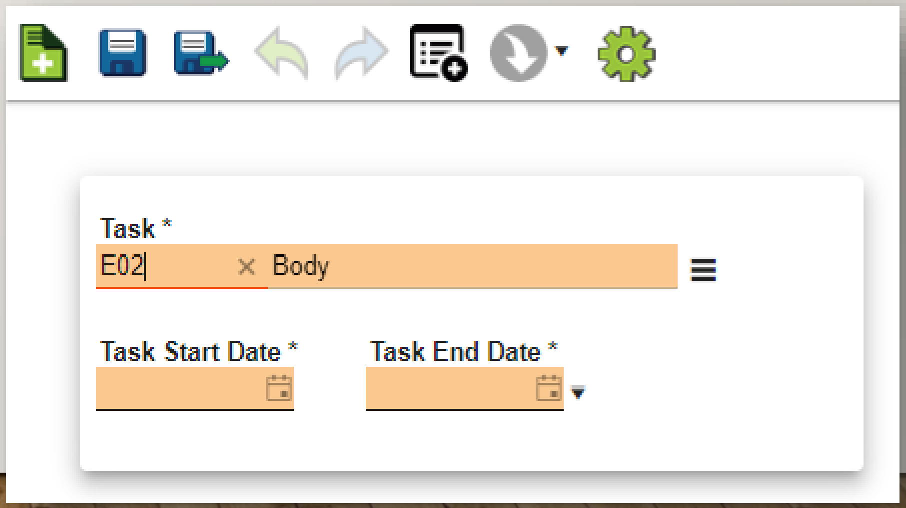




CREATE A WORK ORDER – WORK ORDER TASKS TAB

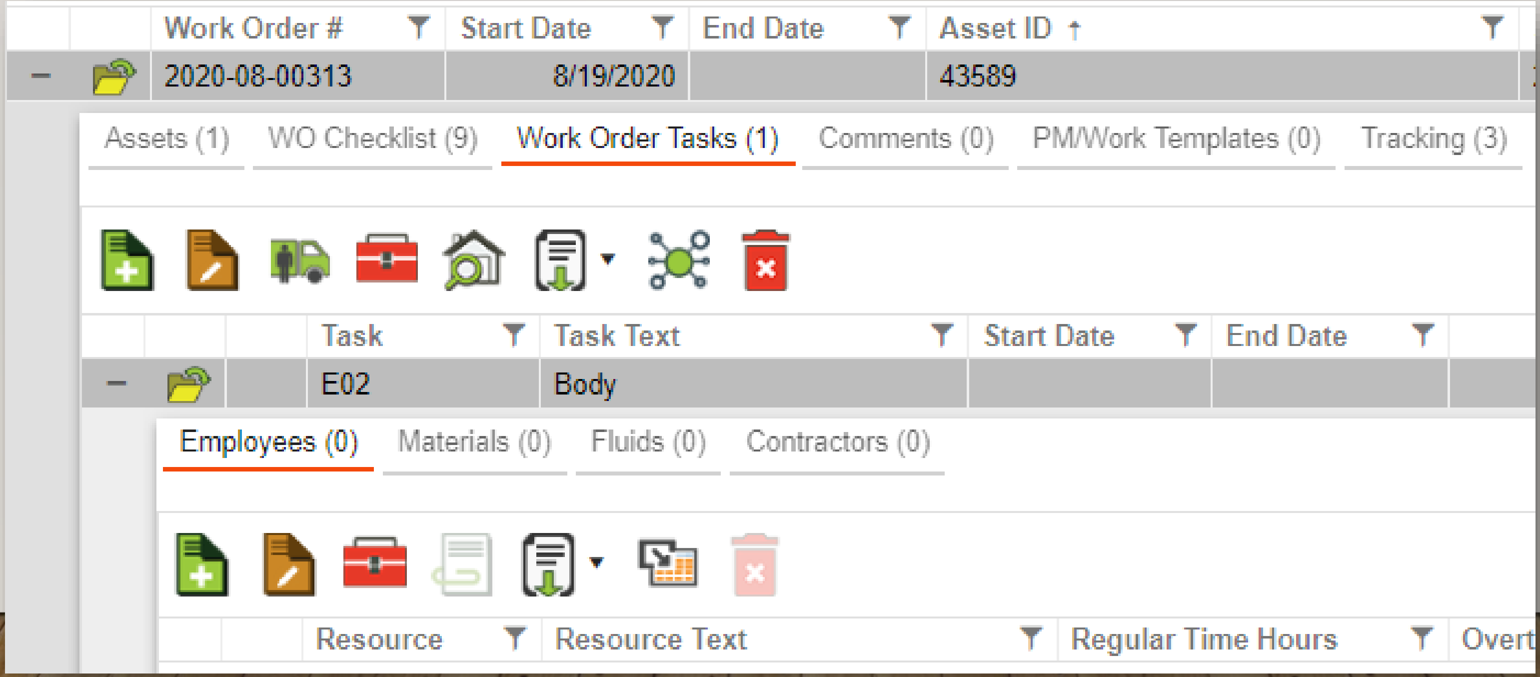
- Next, click on the **Work Order Tasks** tab.
- Click on the folder icon to open the form to enter the task start and end date. If there is not a task there you will need to click on the green paper Add a Record icon to add the task you need. Save & Close.





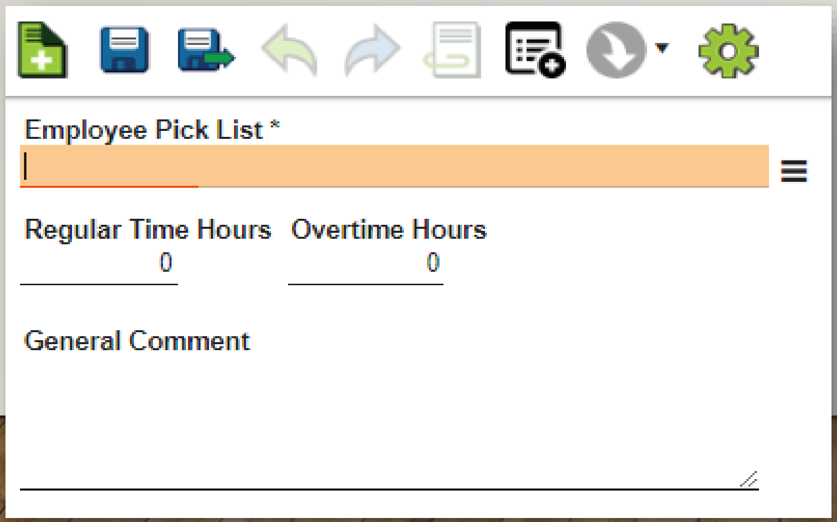
CREATE A WORK ORDER – WORK ORDER TASKS TAB

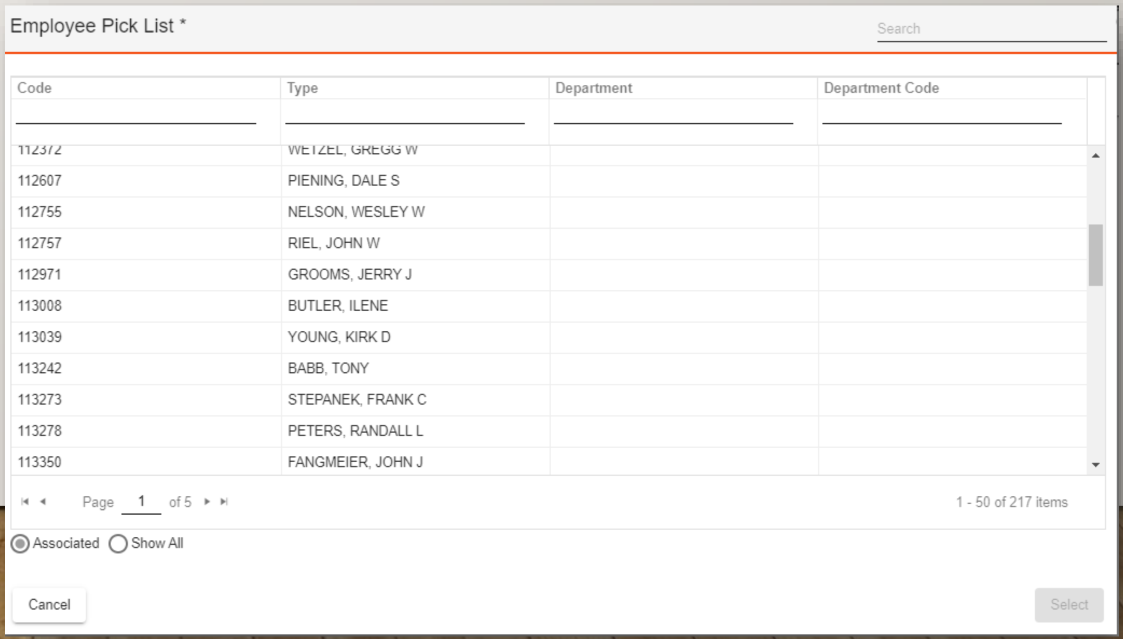
- Click on the gray plus sign to enter the data for your resources.
- Click on the Resource Type tab you want to enter data for.



CREATE A WORK ORDER – WORK ORDER TASKS TAB

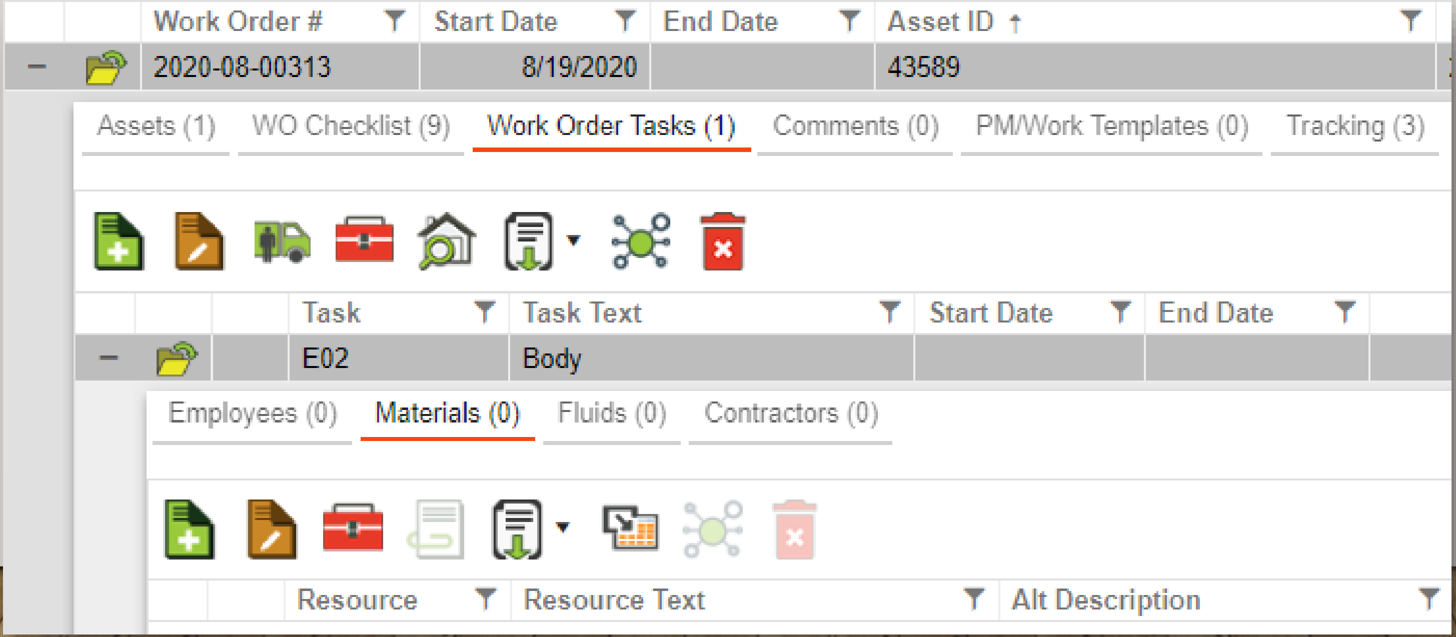
- For this example, I have selected Employees. To add an employee, click on the Add a New Record icon (green paper) from the Resource Type grid. Select the appropriate employee from the picklist. You can search faster by typing in the name in the Type search box.
- Fill in the appropriate Regular Time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





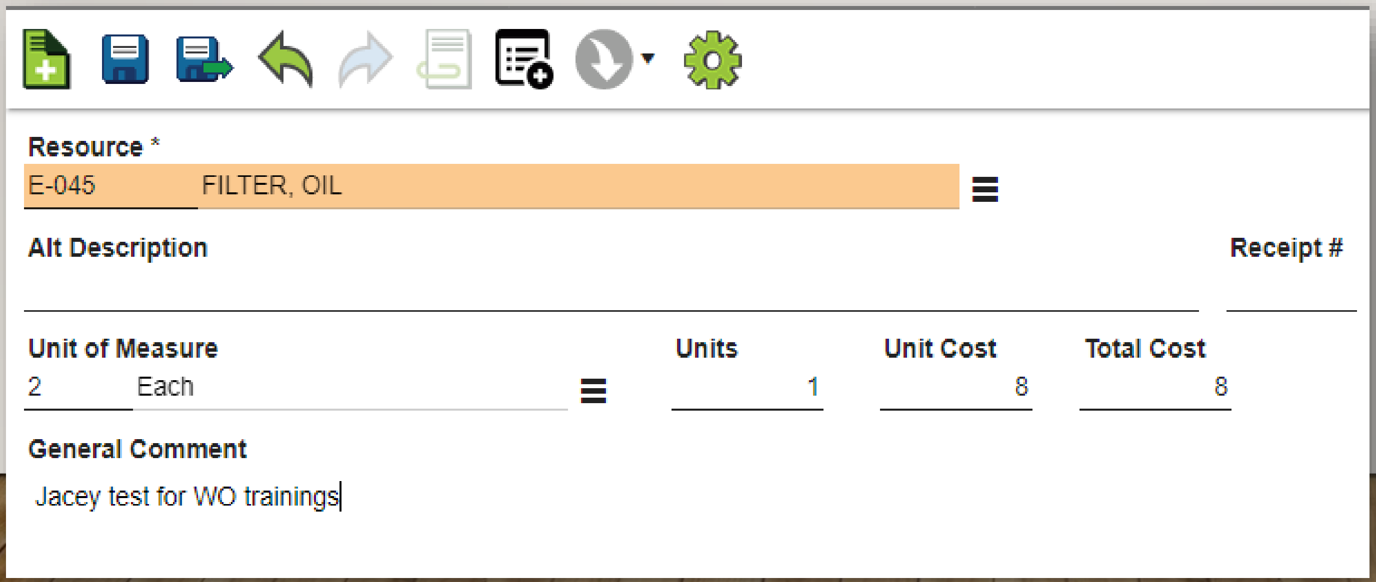
CREATE A WORK ORDER – WORK ORDER TASKS TAB

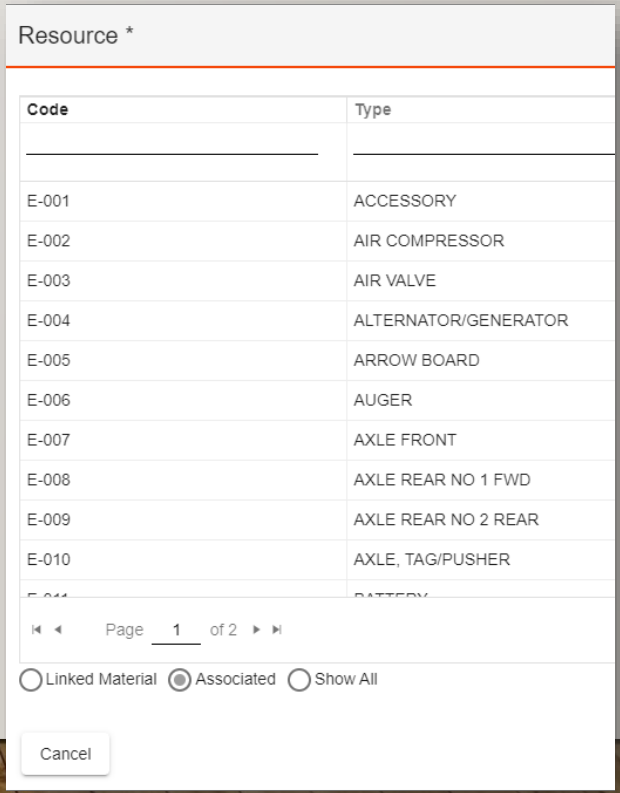
- Let's add another resource!!
- Select the Resource Type tab of Materials. Click the Add a new Record icon (green paper) to add the material resource.



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.





QUESTIONS

- 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
- Sandy Forsgren, IT Business Systems Analyst (402)479-4504

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- Timothy Foss, Engineer IV (402)479-3597 timothy.foss@nebraska.gov

THANK YOU!!