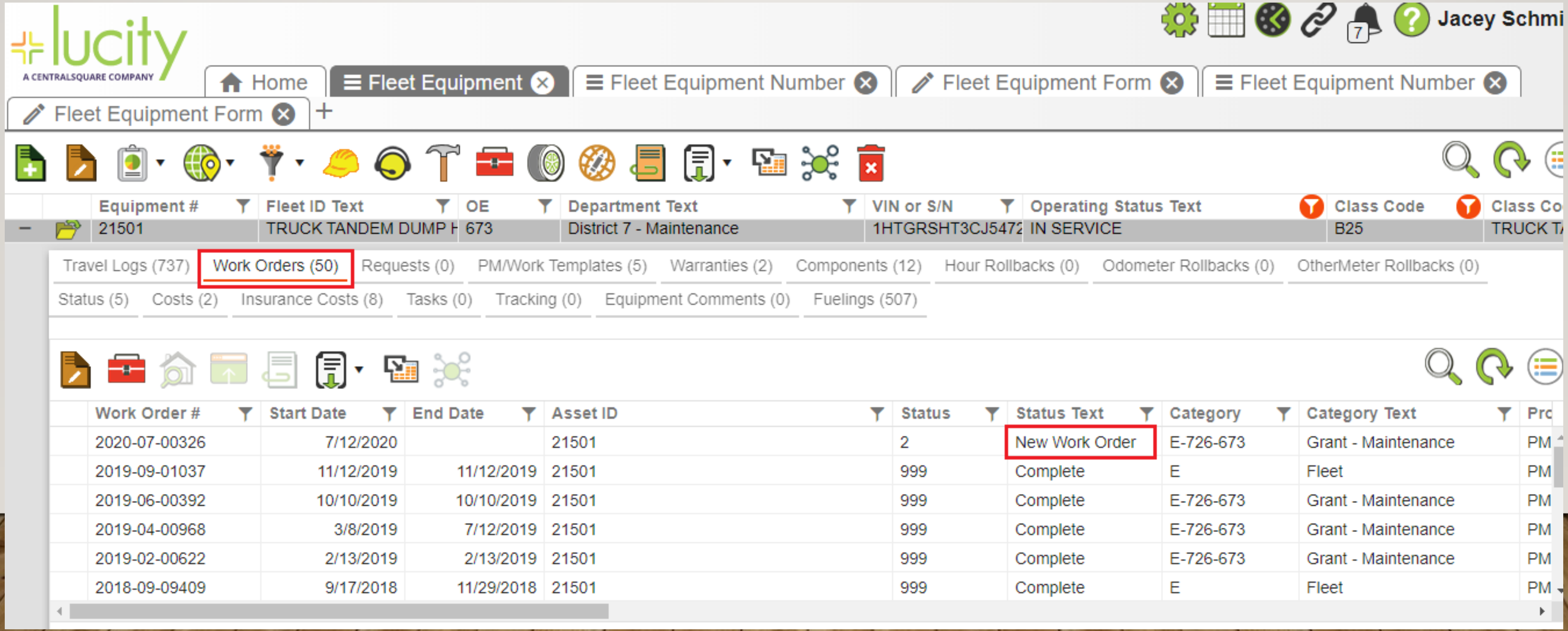
NDOT LUCITY WEB FLEET WORK ORDER TRAINING

COMPLETING A GENERATED PM WORK ORDER FOR FLEET – V.2019R2

AUGUST 17TH, 2020 (UPDATED 5/24/2021)

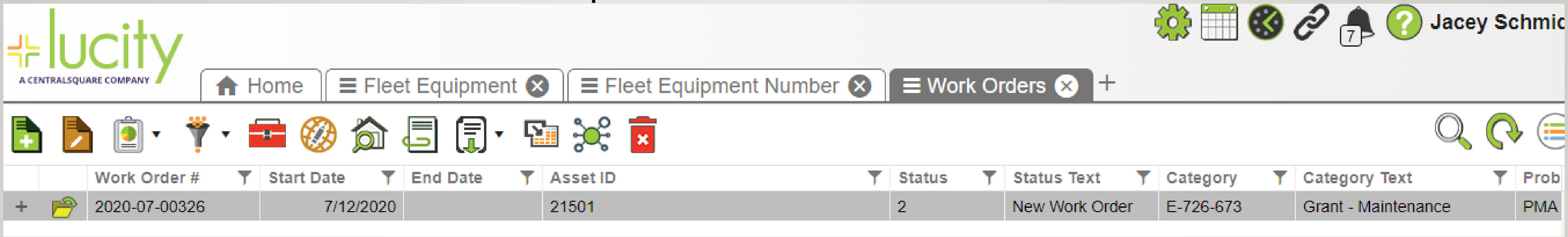
COMPLETING A GENERATED PM WORK ORDER

- From your Fleet Inventory you can see the work orders for each equipment record via the gray plus sign next to the record. Click on the gray plus sign, then click on the Work Orders tab. Highlight the new work order row that was generated that you want to work on or view.
- Click on the Open icon and make sure you select the Fleet WO view.



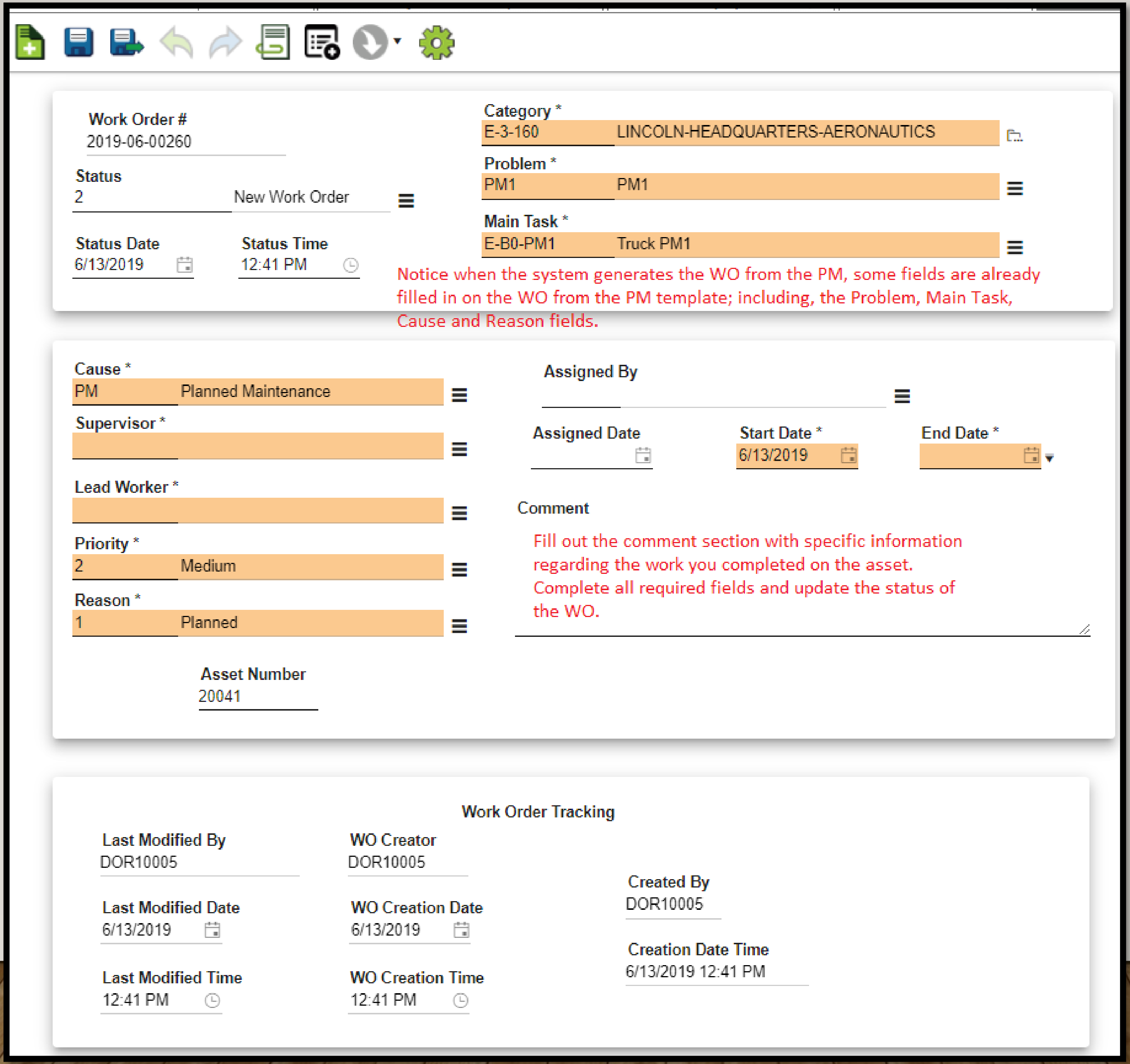
COMPLETING A GENERATED PM WORK ORDER

- Click on the folder icon to open the Work Order form



- Any field with an asterisk next to it is required and needs to be completed. The Assigned Date field is also required and needs to be filled out.
- **IMPORTANT:** It is important that you complete all the required fields on the work order, even if they don't have the "required" asterisk by the field. This data is important for Operations Fleet Management's budgeting and reporting.

Fleet WO Form View



Work Order #
2019-06-00260

Status
2 New Work Order

Status Date
6/13/2019

Status Time
12:41 PM

Category *
E-3-160 LINCOLN-HEADQUARTERS-AERONAUTICS

Problem *
PM1 PM1

Main Task *
E-B0-PM1 Truck PM1

Notice when the system generates the WO from the PM, some fields are already filled in on the WO from the PM template; including, the Problem, Main Task, Cause and Reason fields.

Cause *
PM Planned Maintenance

Supervisor *

Lead Worker *

Priority *
2 Medium

Reason *
1 Planned

Asset Number
20041

Assigned By

Assigned Date

Start Date *
6/13/2019

End Date *

Comment

Fill out the comment section with specific information regarding the work you completed on the asset. Complete all required fields and update the status of the WO.

Work Order Tracking

Last Modified By
DOR10005

WO Creator
DOR10005

Created By
DOR10005

Last Modified Date
6/13/2019

WO Creation Date
6/13/2019

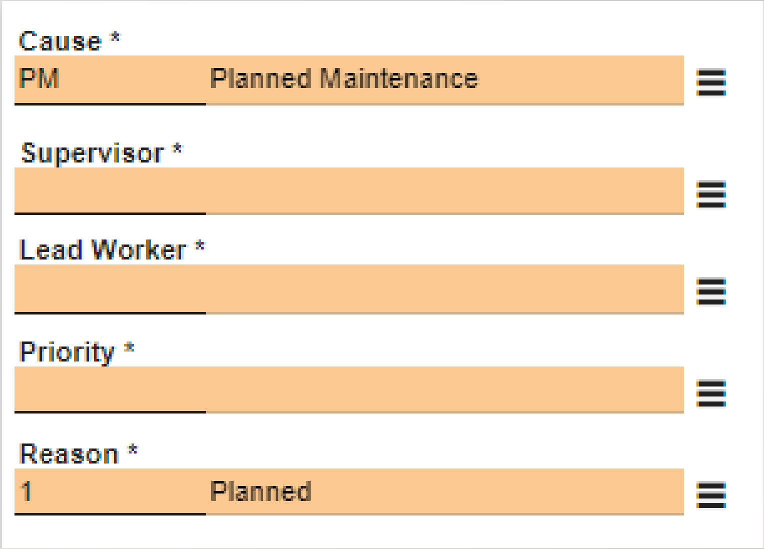
Creation Date Time
6/13/2019 12:41 PM

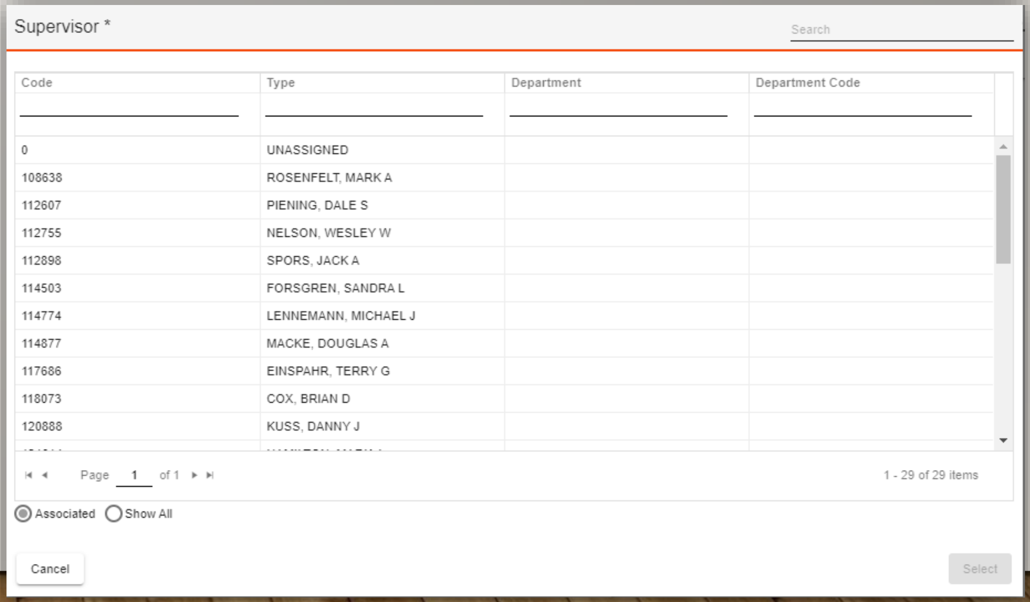
Last Modified Time
12:41 PM

WO Creation Time
12:41 PM

COMPLETING A GENERATED PM WORK ORDER

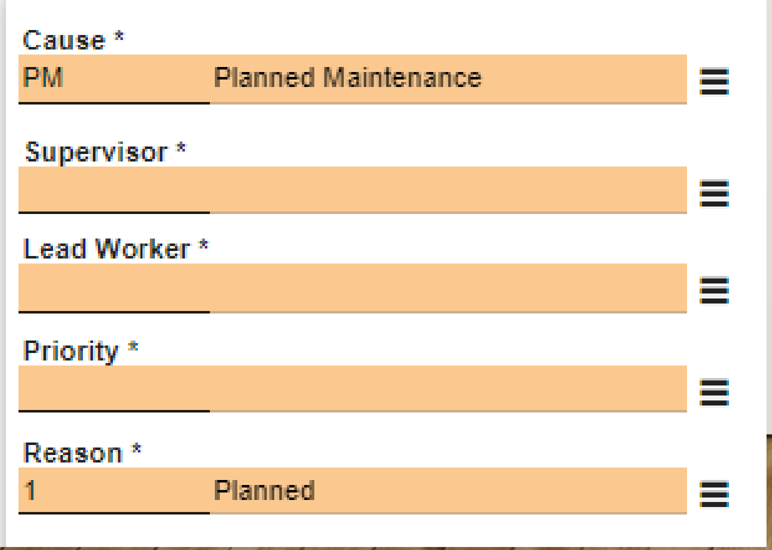
- Click on the **Supervisor** picklist to select the yard supervisor for the equipment you're working on.
- Enter the name in the Type field to search for the supervisor you are looking for.
- If the name you are searching for is not appearing then click the Show All button. If that does not bring up the name then contact NDOT Lucity Support to make sure that employee has been added to Lucity.

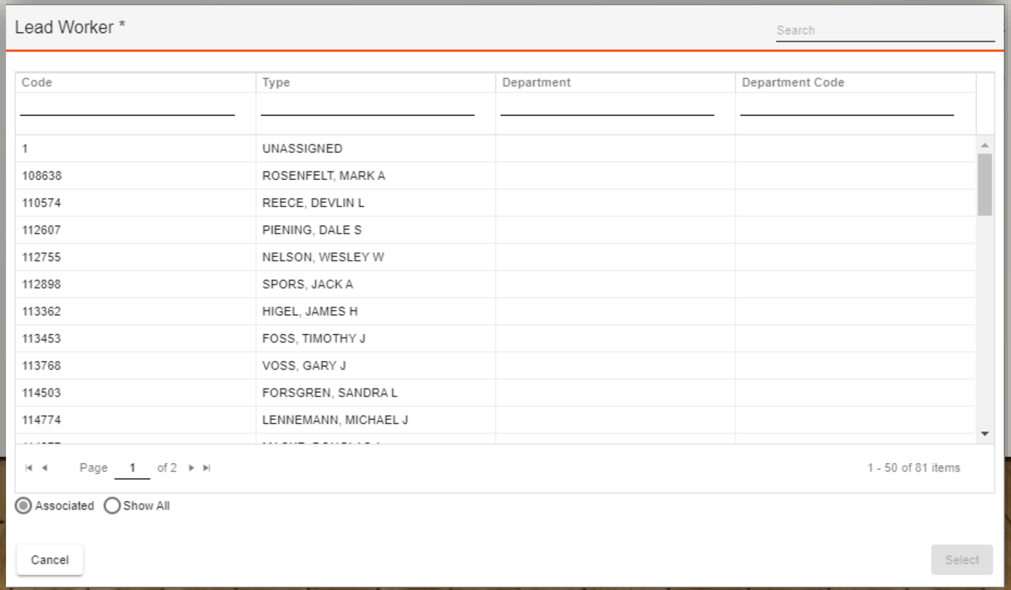




COMPLETING A GENERATED PM WORK ORDER

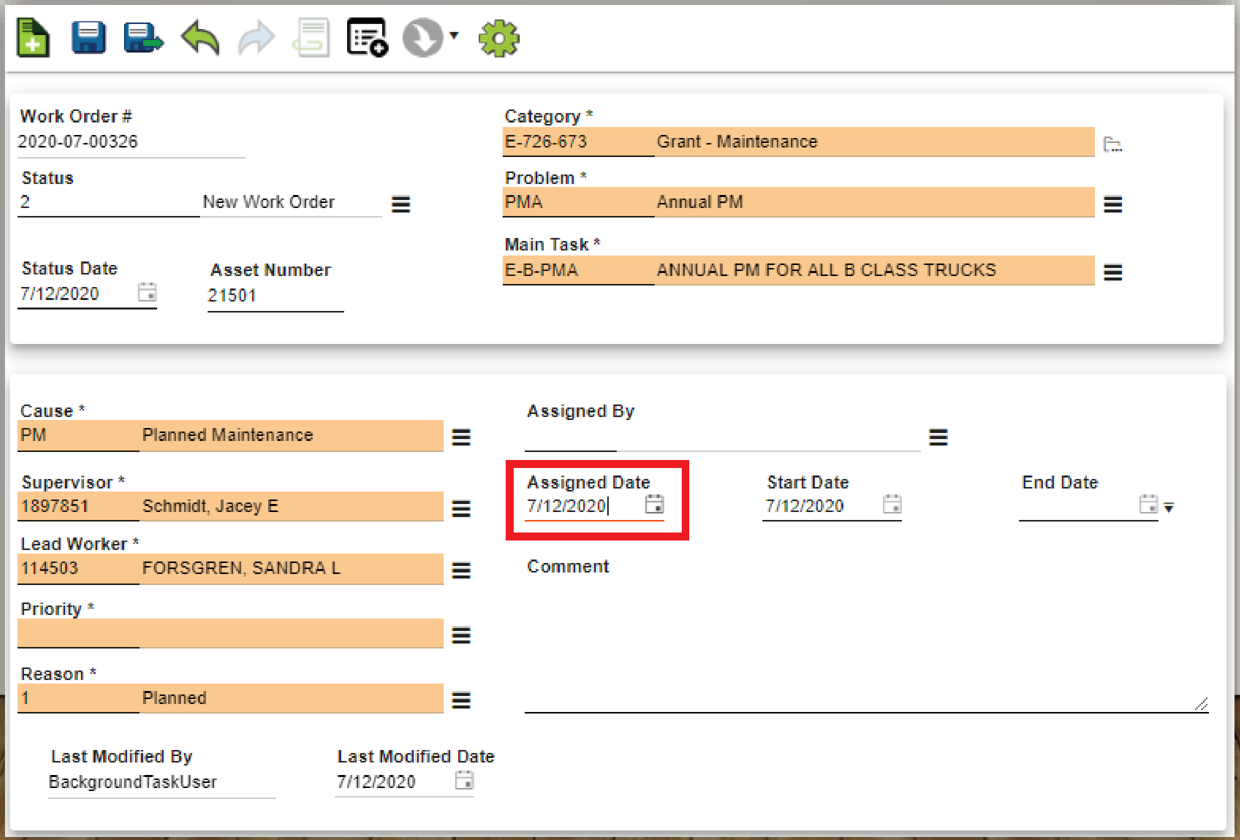
- Click on the **Lead Worker** picklist to select the name of the primary person working on the equipment.
- Enter the name in the Type field to search for the lead worker you are looking for.
- If the name you are searching for is not appearing, then click the Show All button. If that does not bring up the name, then contact NDOT Lucity Support to make sure that employee has been added to Lucity.





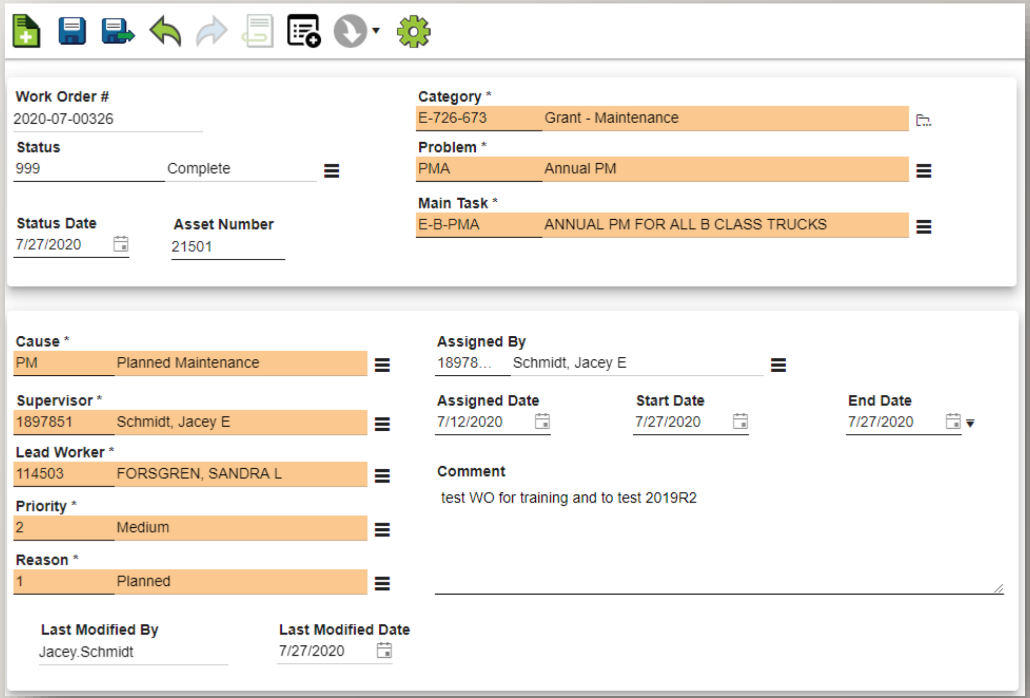
COMPLETING A GENERATED PM WORK ORDER

- Click on the calendar next to the **Assigned Date** field and select the date when you learned that the equipment needed service.



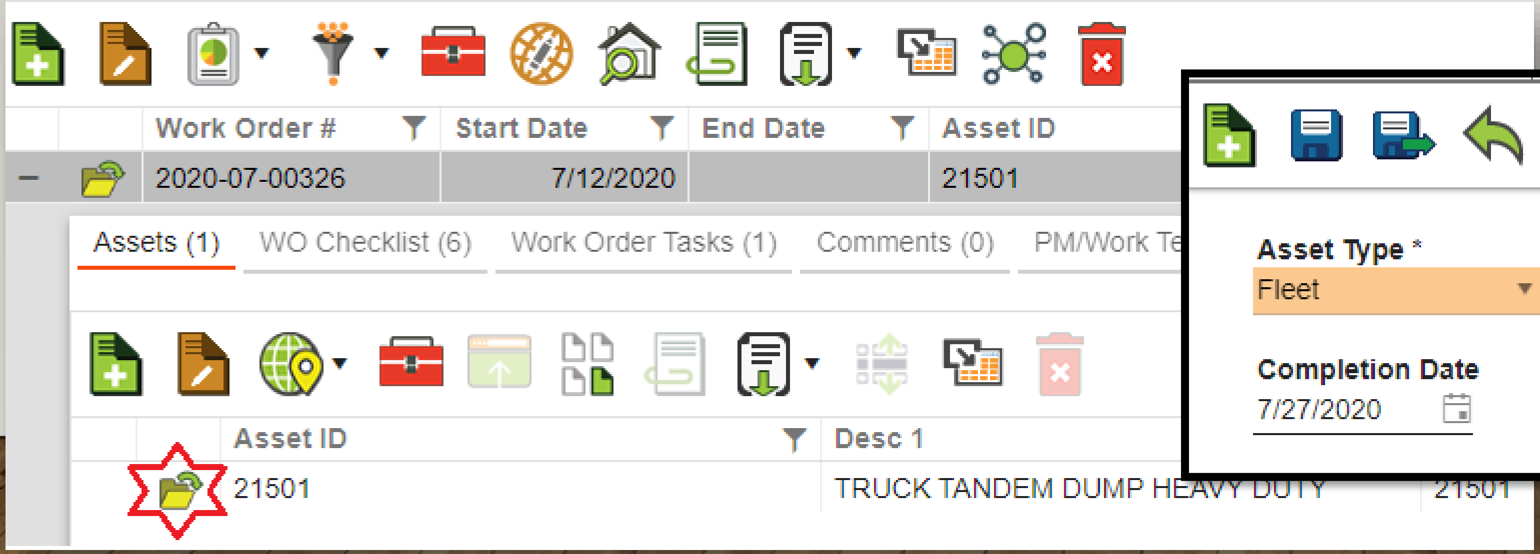
COMPLETING A GENERATED PM WORK ORDER

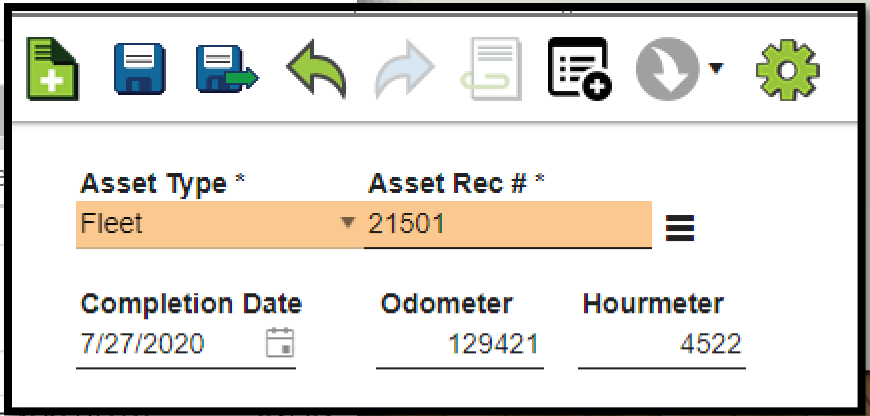
- How to Complete the Work Order on the Work Order form
  - Click on the status field picklist and select **Complete**. Don't forget to enter the end date for the work order. It is important the start date and end date are reflective of the time spent on the work associated with the work order so Operations 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.



COMPLETING A GENERATED PM WORK ORDER

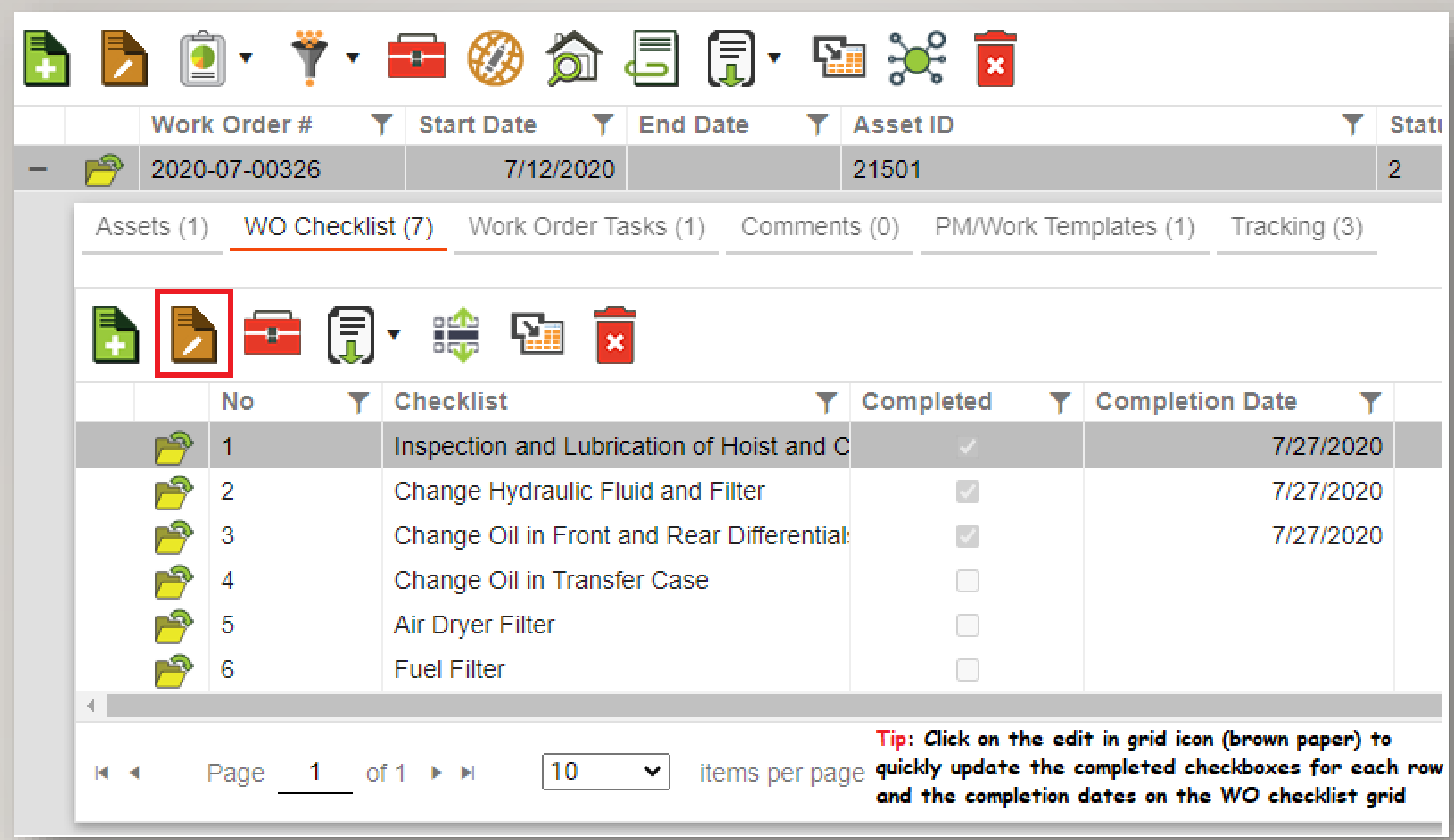
- Now we need to complete the information in the tabs. Click on the gray plus sign next to your work order record to expand the tabs.
- Click on the **Assets** tab, click the folder icon to open the form so you can fill in the completion date, odometer miles and/or hourmeter hours, then Save & Close. IMPORTANT: the data in the asset tab updates the eval section on the fleet record form so it is **VERY IMPORTANT** that is this data is entered in Lucity! Thank you.

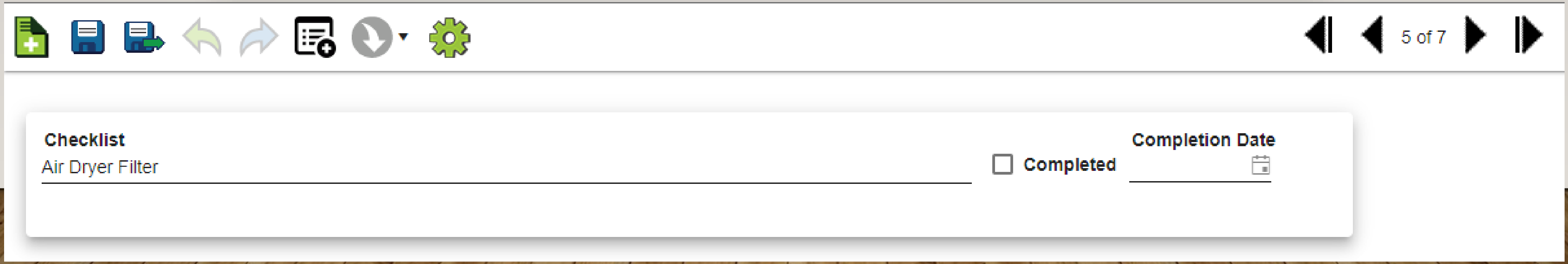




COMPLETING A GENERATED PM WORK ORDER

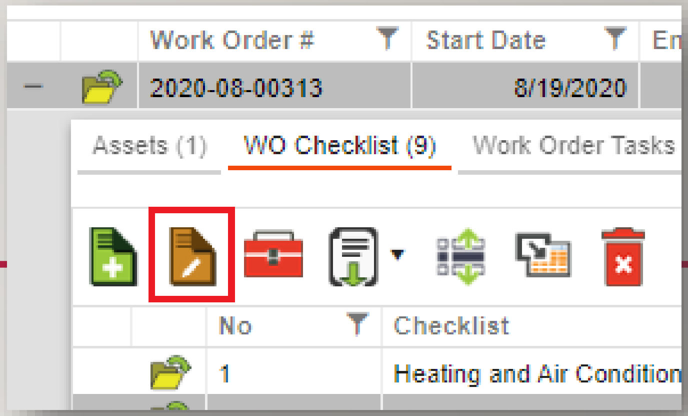
- Click on the **WO Checklist** tab
- Select the checklist items (events) that were completed. Open the checklist item form by clicking on the folder icon to check the complete box and fill in the complete date. Save & close. There may be several pages of checklist items.
- If needed, you can add additional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

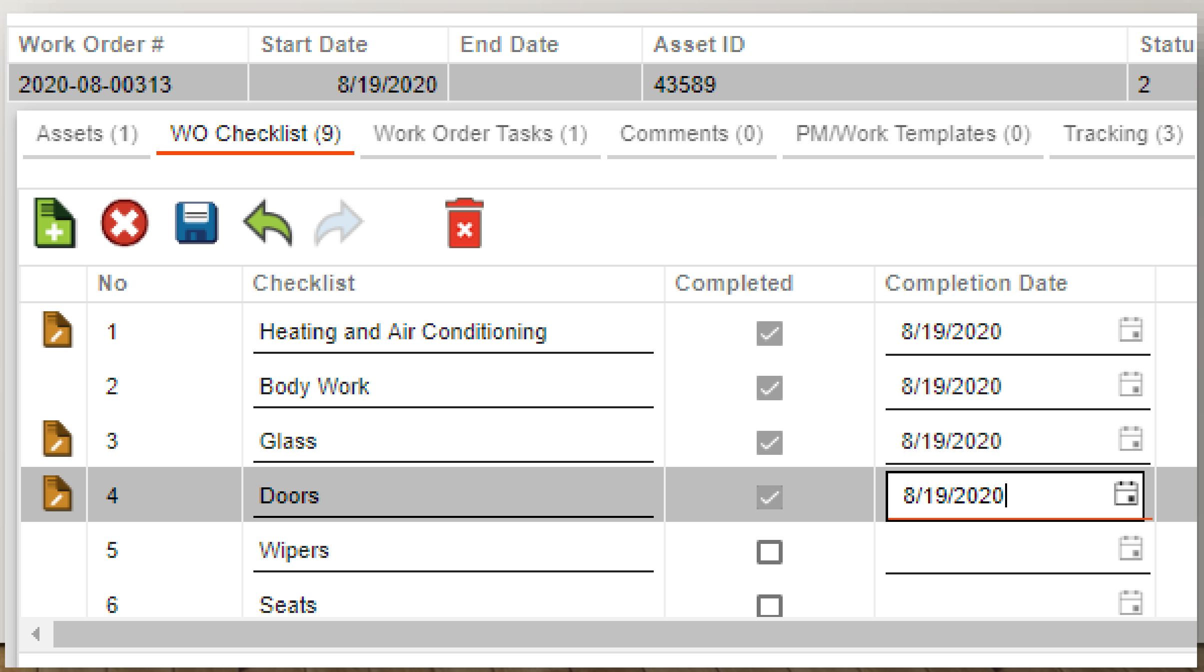

Work Order #
Start Date
End Date
Asset ID
Stat
2020-07-00326
7/12/2020
21501
2
Assets (1)
WO Checklist (7)
Work Order Tasks (1)
Comments (0)
PM/Work Templates (1)
Tracking (3)
No
Checklist
Completed
Completion Date
1 Inspection and Lubrication of Hoist and C 7/27/2020
2 Change Hydraulic Fluid and Filter 7/27/2020
3 Change Oil in Front and Rear Differential: 7/27/2020
4 Change Oil in Transfer Case
5 Air Dryer Filter
6 Fuel Filter
Page 1 of 1
10
items per page
Tip: 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


5 of 7
Checklist
Air Dryer Filter
Completed
Completion Date

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.

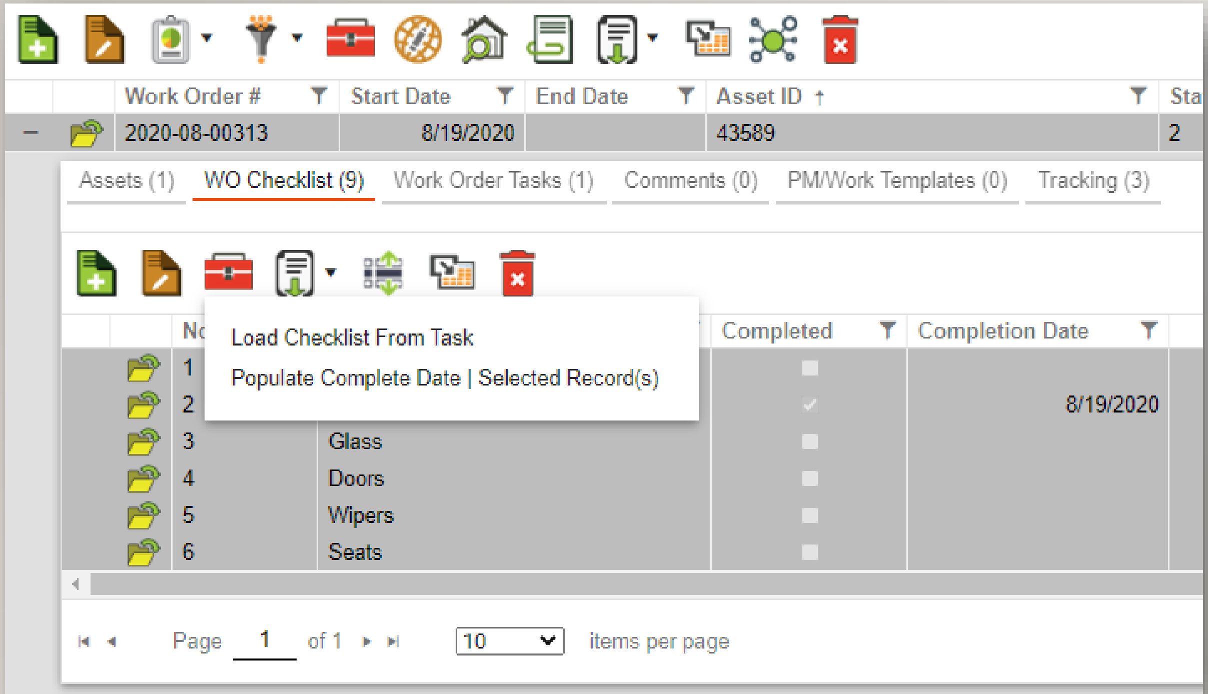


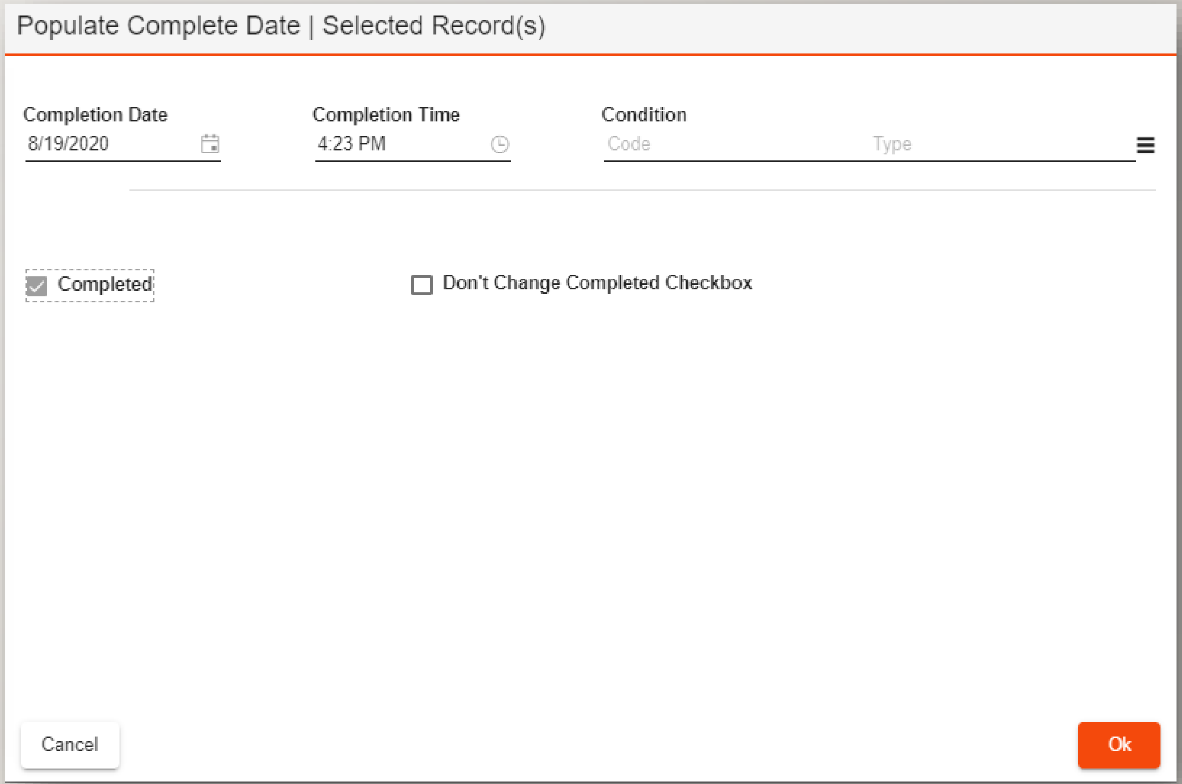


WO CHECKLIST TAB

- **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.

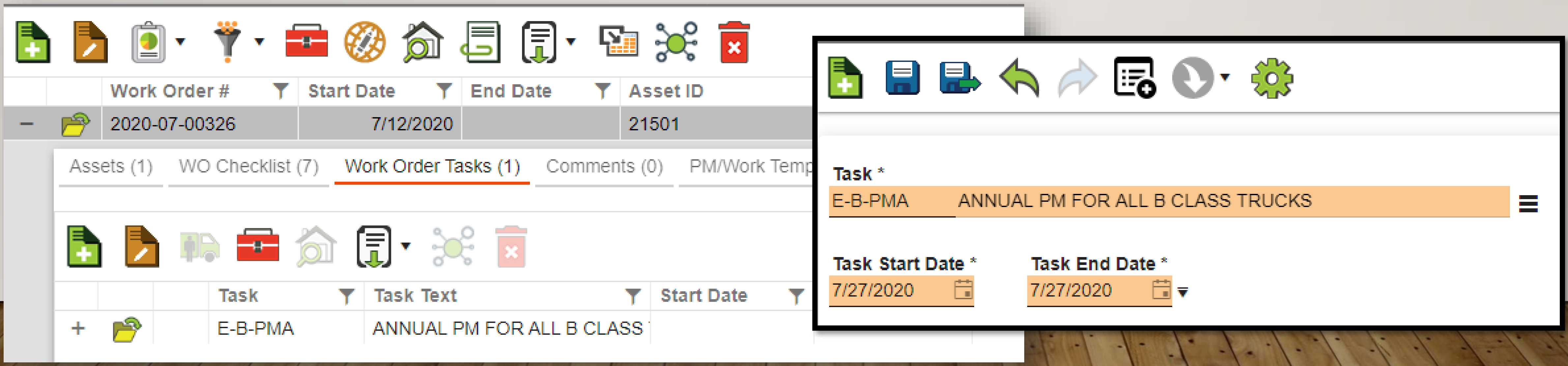
Populate Complete Date | Selected Record(s) – WO Checklist tool





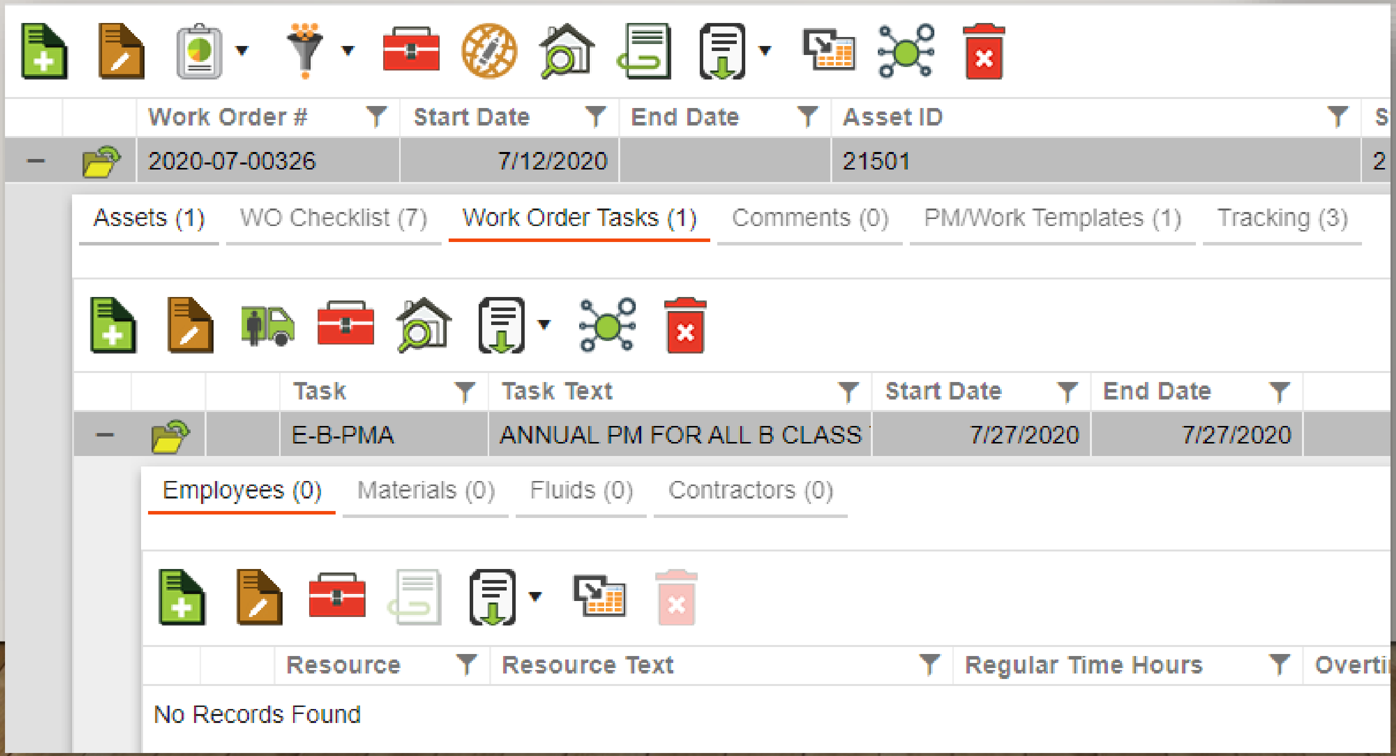
COMPLETING A GENERATED PM WORK ORDER

- Next, click on the **Work Order Tasks** tab.
- Click on the folder icon to open the form to enter the task start and task end date. The task end date will update the End Date field on the WO form so it's important that this information is entered. Save & Close.



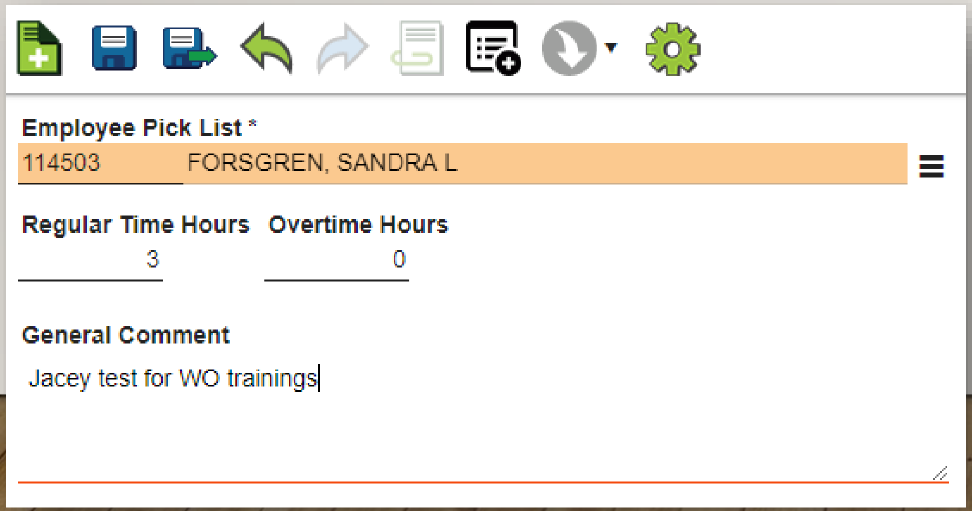
COMPLETING A GENERATED PM WORK ORDER

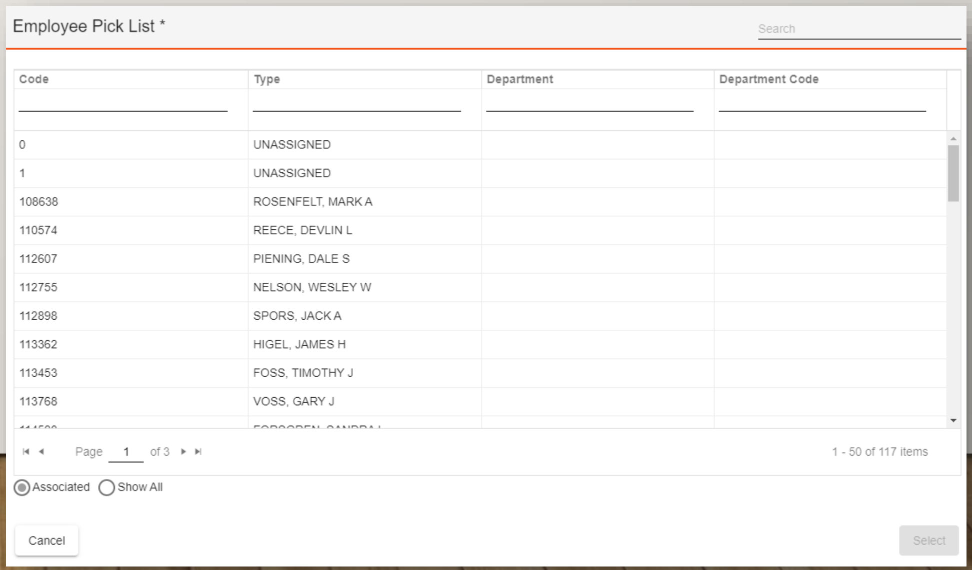
- Click on the gray plus sign to enter the data for your resources.
- Click on the Resource Type tab you want to enter data for.



COMPLETING A GENERATED PM WORK ORDER

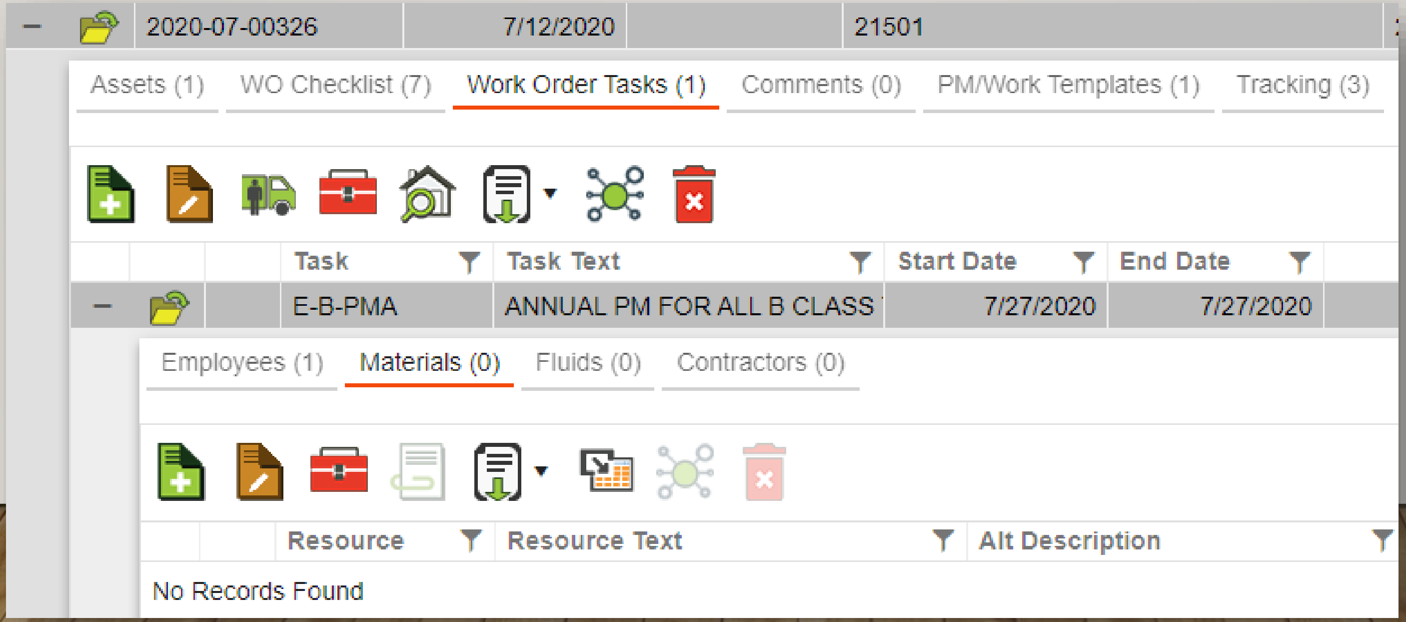
- For this example, I have selected Employees. To add labor hours for an employee, click on the Add a New Record icon (green paper) from the Resource Type grid. Select the appropriate employee from the picklist. You can search faster by typing in the name in the Type search box.
- Fill in the hours worked in the Regular Time Hours field. It is important that the labor hours are entered in Lucity for Fleet Management's budgeting and reporting. **NEVER** fill in the Overtime Hours field. Save & Close when done.





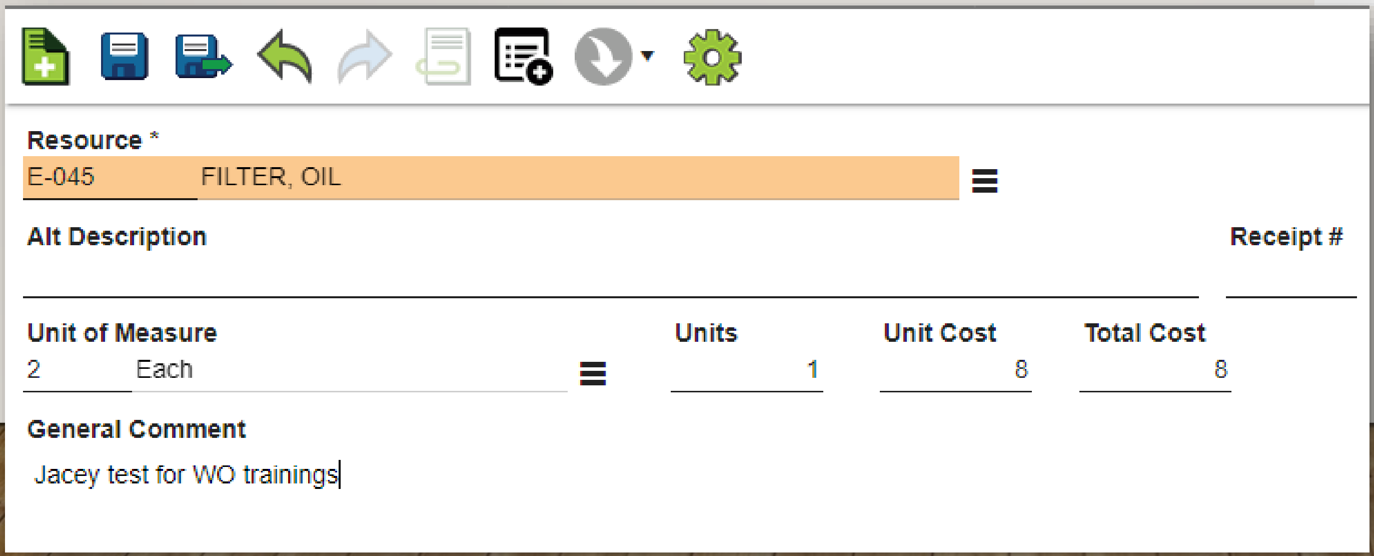
COMPLETING A GENERATED PM WORK ORDER

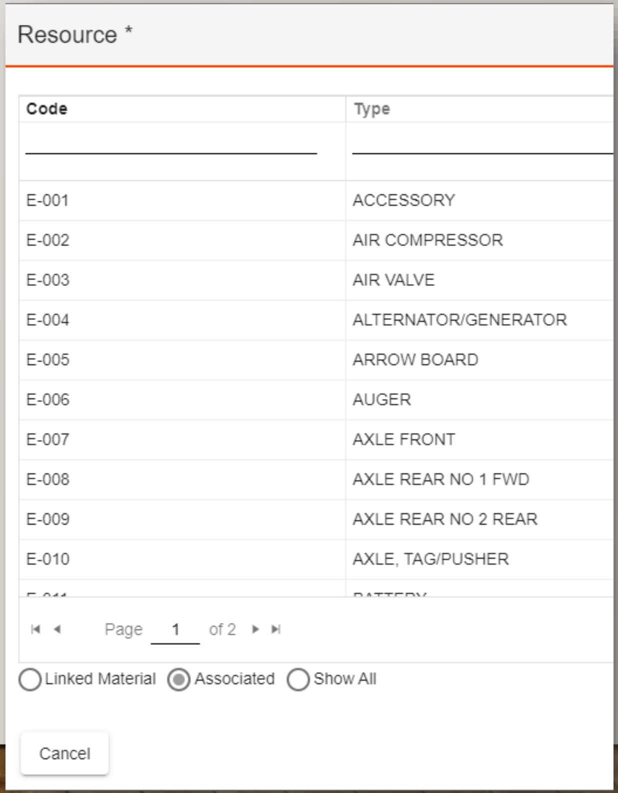
- Let's add another resource!!
- Select the Resource Type tab of Materials. The Materials tab is now underlined in Red. Notice how the grid column fields change as you select a different resource type. Click the Add a new Record icon (green paper) to add the material resource.



COMPLETING A GENERATED PM WORK ORDER

- Select the appropriate Material Resource from the picklist.
- Click on the Unit of Measure picklist and choose the appropriate option, this will usually be Code – 2 for Each.
- For Resource Type of Material, Fluid or Contractor you will need to fill in a dollar amount in the Unit Cost field. The Total Cost field will calculate automatically from what you enter in Units and Unit Cost. 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

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

THANK YOU!!