


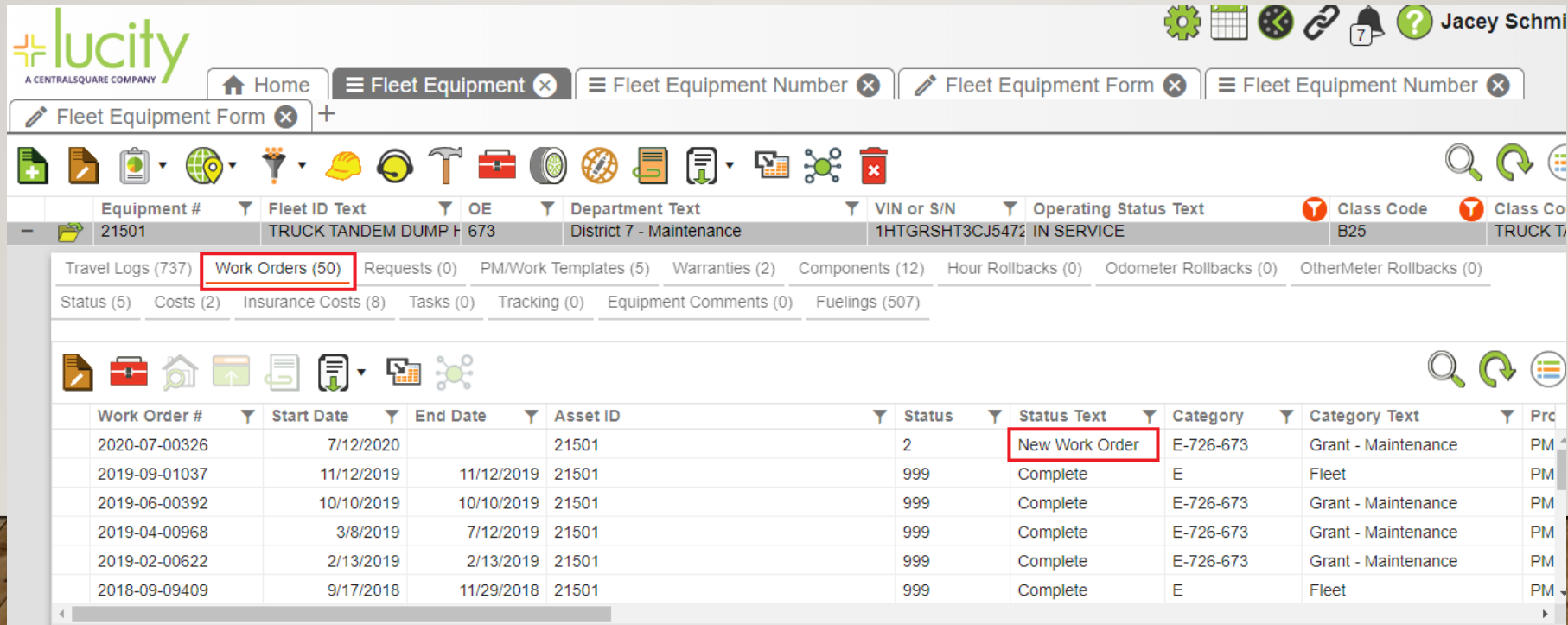
NDOT LUCITY WEB FLEET WORK ORDER TRAINING

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.



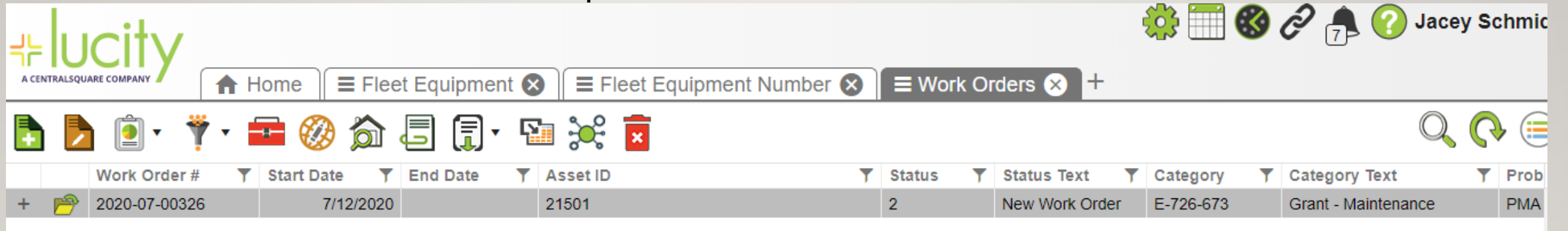
The screenshot displays the Lucity software interface. At the top, the Lucity logo is visible, along with user information for Jacey Schmi. The main navigation bar includes tabs for Home, Fleet Equipment, and Fleet Equipment Number. Below this, a toolbar contains various icons for navigation and actions. The central part of the interface shows a table of fleet equipment records. The first record is highlighted, showing details for Equipment # 21501, Fleet ID Text TRUCK TANDEM DUMP, OE 673, Department Text District 7 - Maintenance, VIN or S/N 1HTGRSHT3CJ5472, Operating Status Text IN SERVICE, Class Code B25, and Class Co TRUCK T. Below this, a sub-menu shows various tabs, with 'Work Orders (50)' highlighted. The bottom section of the screenshot shows a table of work orders. The first row is highlighted, showing Work Order # 2020-07-00326, Start Date 7/12/2020, End Date, Asset ID 21501, Status 2, Status Text New Work Order, Category E-726-673, Category Text Grant - Maintenance, and Prc PM.

Equipment #	Fleet ID Text	OE	Department Text	VIN or S/N	Operating Status Text	Class Code	Class Co
21501	TRUCK TANDEM DUMP	673	District 7 - Maintenance	1HTGRSHT3CJ5472	IN SERVICE	B25	TRUCK T

Work Order #	Start Date	End Date	Asset ID	Status	Status Text	Category	Category Text	Prc
2020-07-00326	7/12/2020		21501	2	New Work Order	E-726-673	Grant - Maintenance	PM
2019-09-01037	11/12/2019	11/12/2019	21501	999	Complete	E	Fleet	PM
2019-06-00392	10/10/2019	10/10/2019	21501	999	Complete	E-726-673	Grant - Maintenance	PM
2019-04-00968	3/8/2019	7/12/2019	21501	999	Complete	E-726-673	Grant - Maintenance	PM
2019-02-00622	2/13/2019	2/13/2019	21501	999	Complete	E-726-673	Grant - Maintenance	PM
2018-09-09409	9/17/2018	11/29/2018	21501	999	Complete	E	Fleet	PM

COMPLETING A GENERATED PM WORK ORDER

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




The screenshot shows the Lucity software interface. The top navigation bar includes the Lucity logo (A CENTRAL SQUARE COMPANY), a home icon, and several active tabs: 'Home', 'Fleet Equipment', 'Fleet Equipment Number', and 'Work Orders'. The 'Work Orders' tab is currently selected. Below the navigation bar is a toolbar with various icons for document management, search, and navigation. The main content area displays a table of work orders. The table has columns for Work Order #, Start Date, End Date, Asset ID, Status, Status Text, Category, Category Text, and Prob. A single work order is visible with the following details:

Work Order #	Start Date	End Date	Asset ID	Status	Status Text	Category	Category Text	Prob
2020-07-00326	7/12/2020		21501	2	New Work Order	E-726-673	Grant - Maintenance	PMA

- 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

Cause *
PM Planned Maintenance

Supervisor *

Lead Worker *

Priority *
2 Medium

Reason *
1 Planned

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.

Asset Number
20041

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.

Cause *

PM Planned Maintenance

Supervisor *

Lead Worker *

Priority *

Reason *

1 Planned

Supervisor *

Search

Code	Type	Department	Department Code
0	UNASSIGNED		
108638	ROSENFELT, MARK A		
112607	PIENING, DALE S		
112755	NELSON, WESLEY W		
112898	SPORS, JACK A		
114503	FORSGREN, SANDRA L		
114774	LENNEMANN, MICHAEL J		
114877	MACKE, DOUGLAS A		
117686	EINSPAHR, TERRY G		
118073	COX, BRIAN D		
120888	KUSS, DANNY J		

Page 1 of 1

1 - 29 of 29 items

Associated Show All

Cancel Select

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.

Cause *

PM Planned Maintenance

Supervisor *

Lead Worker *

Priority *

Reason *

1 Planned

Lead Worker *

Search

Code	Type	Department	Department Code
1	UNASSIGNED		
108638	ROSENFELT, MARK A		
110574	REECE, DEVLIN L		
112607	PIENING, DALE S		
112755	NELSON, WESLEY W		
112898	SPORS, JACK A		
113362	HIGEL, JAMES H		
113453	FOSS, TIMOTHY J		
113768	VOSS, GARY J		
114503	FORSGREN, SANDRA L		
114774	LENNEMANN, MICHAEL J		

Page 1 of 2

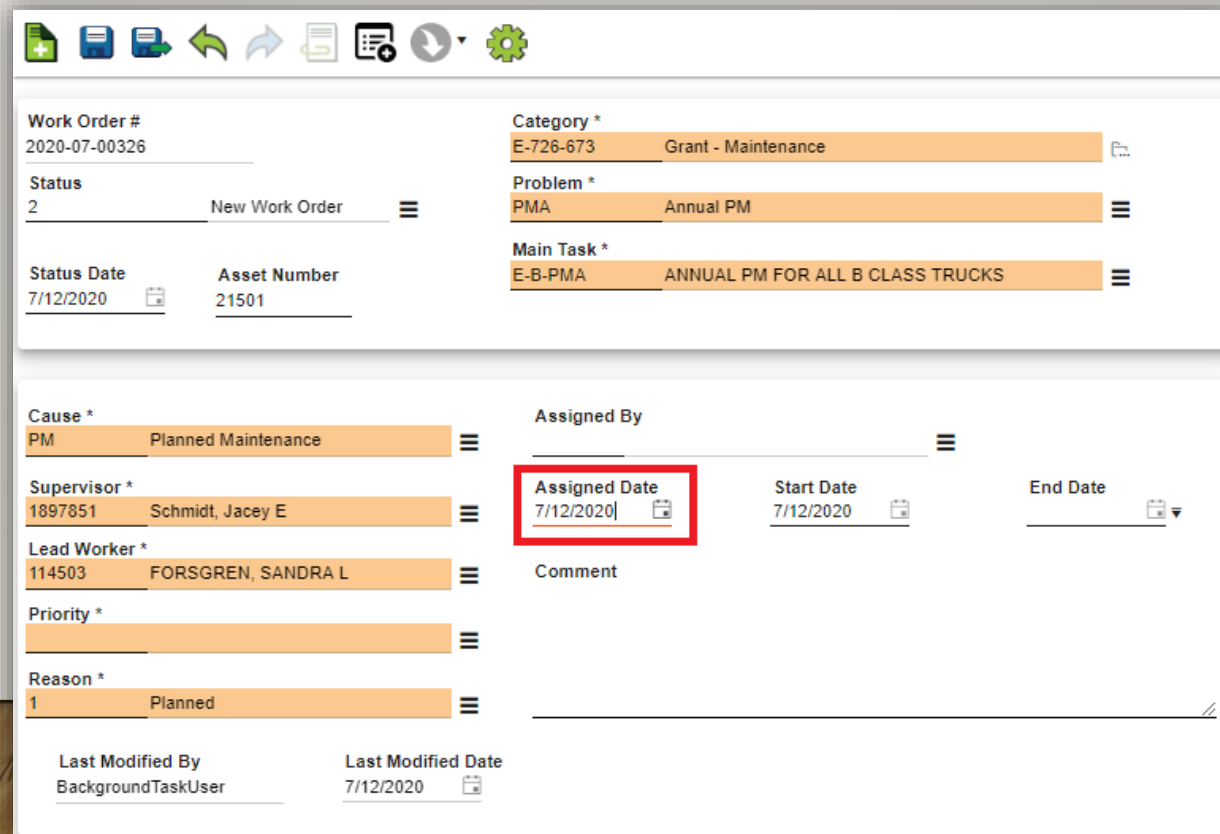
1 - 50 of 81 items

Associated Show All

Cancel Select

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.

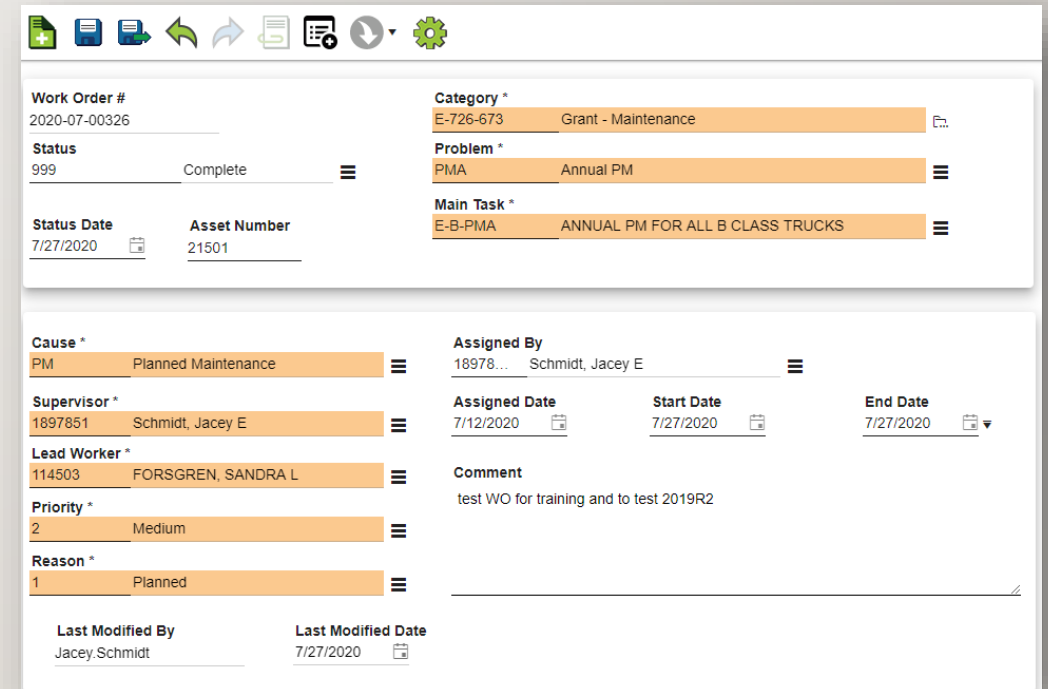


The screenshot displays a web-based interface for managing work orders. At the top, there is a toolbar with icons for adding, saving, refreshing, undo, redo, print, help, and settings. The main form is divided into several sections:

- Work Order #:** 2020-07-00326
- Status:** 2 (New Work Order)
- Status Date:** 7/12/2020
- Asset Number:** 21501
- Category *:** E-726-673 Grant - Maintenance
- Problem *:** PMA Annual PM
- Main Task *:** E-B-PMA ANNUAL PM FOR ALL B CLASS TRUCKS
- Cause *:** PM Planned Maintenance
- Supervisor *:** 1897851 Schmidt, Jacey E
- Lead Worker *:** 114503 FORSGREN, SANDRA L
- Priority *:** (empty)
- Reason *:** 1 Planned
- Assigned By:** (empty)
- Assigned Date:** 7/12/2020 (highlighted with a red box)
- Start Date:** 7/12/2020
- End Date:** (empty)
- Comment:** (empty)
- Last Modified By:** BackgroundTaskUser
- Last Modified Date:** 7/12/2020

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. 



Work Order #	2020-07-00326	Category *	E-726-673 Grant - Maintenance
Status	999 Complete	Problem *	PMA Annual PM
Status Date	7/27/2020	Asset Number	21501
Cause *	PM Planned Maintenance	Main Task *	E-B-PMA ANNUAL PM FOR ALL B CLASS TRUCKS
Supervisor *	1897851 Schmidt, Jacey E	Assigned By	18978... Schmidt, Jacey E
Lead Worker *	114503 FORSGREN, SANDRA L	Assigned Date	7/12/2020
Priority *	2 Medium	Start Date	7/27/2020
Reason *	1 Planned	End Date	7/27/2020
Comment	test WO for training and to test 2019R2		
Last Modified By	Jacey.Schmidt	Last Modified Date	7/27/2020

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.

The screenshot displays a software interface with a top toolbar containing various icons. Below the toolbar is a table with columns: Work Order #, Start Date, End Date, and Asset ID. A record is shown with Work Order # 2020-07-00326, Start Date 7/12/2020, and Asset ID 21501. Below the table, there are tabs: Assets (1), WO Checklist (6), Work Order Tasks (1), Comments (0), and PM/Work Te. The 'Assets (1)' tab is selected, and a form is open for editing. The form has a top toolbar with icons for save, undo, redo, and settings. The form fields are:

Asset Type *	Asset Rec # *	
Fleet	21501	
Completion Date	Odometer	Hourmeter
7/27/2020	129421	4522

Below the form, there is another table with columns: Asset ID, Desc 1, and Asset ID. A record is shown with Asset ID 21501, Desc 1 TRUCK TANDEM DUMP HEAVY DUTY, and Asset ID 21501. A red star icon is overlaid on the first record in this table.

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	Status
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	<input checked="" type="checkbox"/>	7/27/2020
2	Change Hydraulic Fluid and Filter	<input checked="" type="checkbox"/>	7/27/2020
3	Change Oil in Front and Rear Differential	<input checked="" type="checkbox"/>	7/27/2020
4	Change Oil in Transfer Case	<input type="checkbox"/>	
5	Air Dryer Filter	<input type="checkbox"/>	
6	Fuel Filter	<input type="checkbox"/>	

Page 1 of 1 | 10 items per page

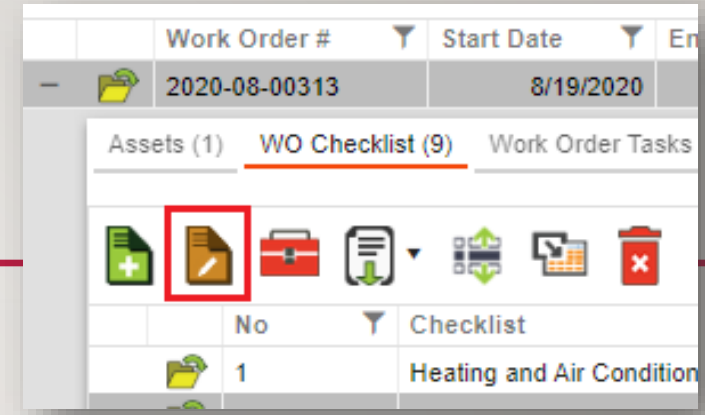
Tip: Click on the edit in grid icon (brown paper) to quickly update the completed checkboxes for each row and the completion dates on the WO checklist grid

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Checklist	Completed	Completion Date
Air Dryer Filter	<input type="checkbox"/>	<input type="text"/>


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)				
[Icons: 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]

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

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 header section displays the following information: 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 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"/>	

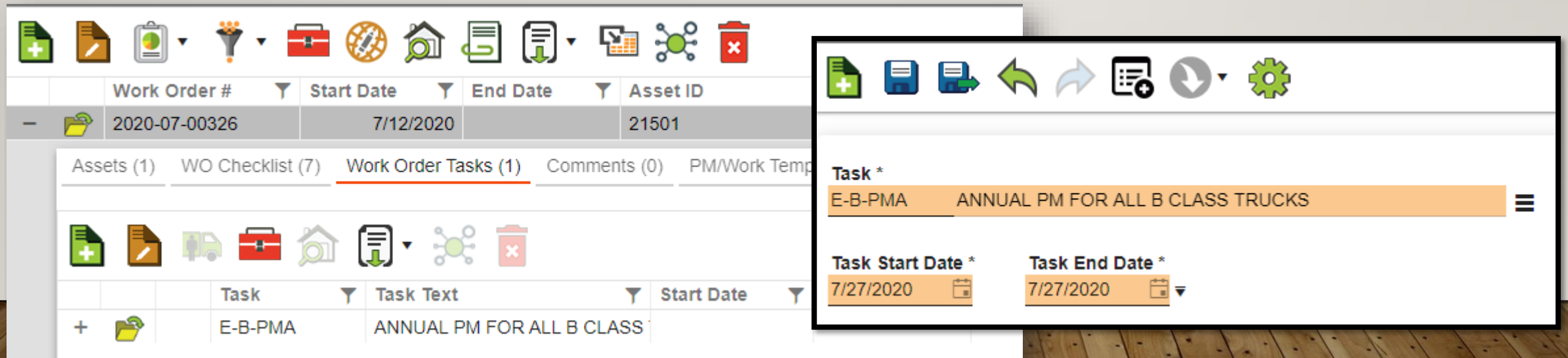
At the bottom of the interface, there is a pagination control showing 'Page 1 of 1' and a dropdown menu set to '10' items per page.

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

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.



The screenshot displays a software interface for managing work orders. The main window shows a table with columns for Work Order #, Start Date, End Date, and Asset ID. A specific work order is selected: 2020-07-00326, starting on 7/12/2020, ending on 7/12/2020, with Asset ID 21501. Below the table, there are tabs for Assets (1), WO Checklist (7), Work Order Tasks (1), Comments (0), and PM/Work Temp. The 'Work Order Tasks (1)' tab is active, showing a table with columns for Task, Task Text, and Start Date. A task is listed: E-B-PMA, ANNUAL PM FOR ALL B CLASS TRUCKS, with a Start Date of 7/27/2020. An inset window is open over the task entry form, showing a toolbar with icons for adding, saving, and navigating. The form fields are: Task * (E-B-PMA ANNUAL PM FOR ALL B CLASS TRUCKS), Task Start Date * (7/27/2020), and Task End Date * (7/27/2020).

Work Order #	Start Date	End Date	Asset ID
2020-07-00326	7/12/2020	7/12/2020	21501

Assets (1)	WO Checklist (7)	Work Order Tasks (1)	Comments (0)	PM/Work Temp

Task	Task Text	Start Date
E-B-PMA	ANNUAL PM FOR ALL B CLASS TRUCKS	7/27/2020

Task *
E-B-PMA ANNUAL PM FOR ALL B CLASS TRUCKS

Task Start Date *	Task End Date *
7/27/2020	7/27/2020

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.

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

The screenshot shows a software interface for managing work orders and resources. It features a top toolbar with various icons, a main table for work orders, and a sub-table for resources. The 'Work Order Tasks' tab is selected, and the 'Employees (0)' resource type is highlighted.

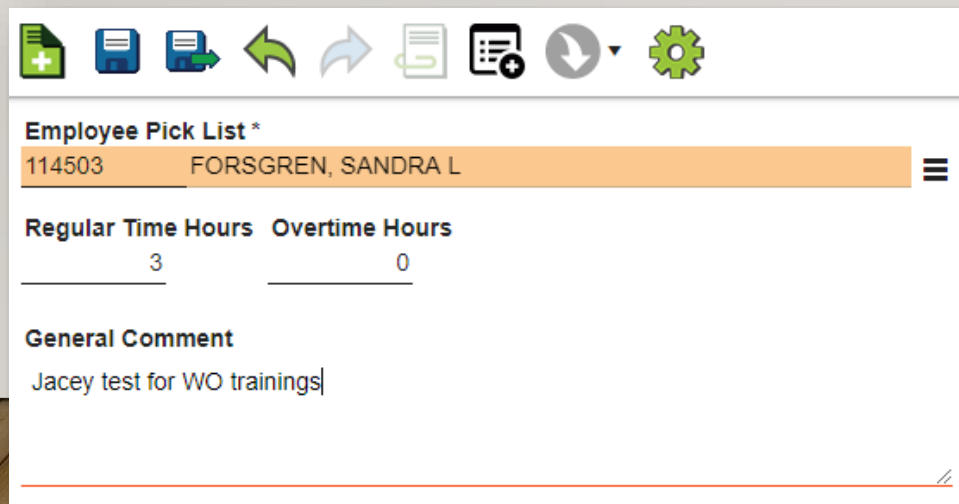
Work Order #	Start Date	End Date	Asset ID
2020-07-00326	7/12/2020		21501

Task	Task Text	Start Date	End Date
E-B-PMA	ANNUAL PM FOR ALL B CLASS	7/27/2020	7/27/2020

Resource	Resource Text	Regular Time Hours	Overti
No Records Found			

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.

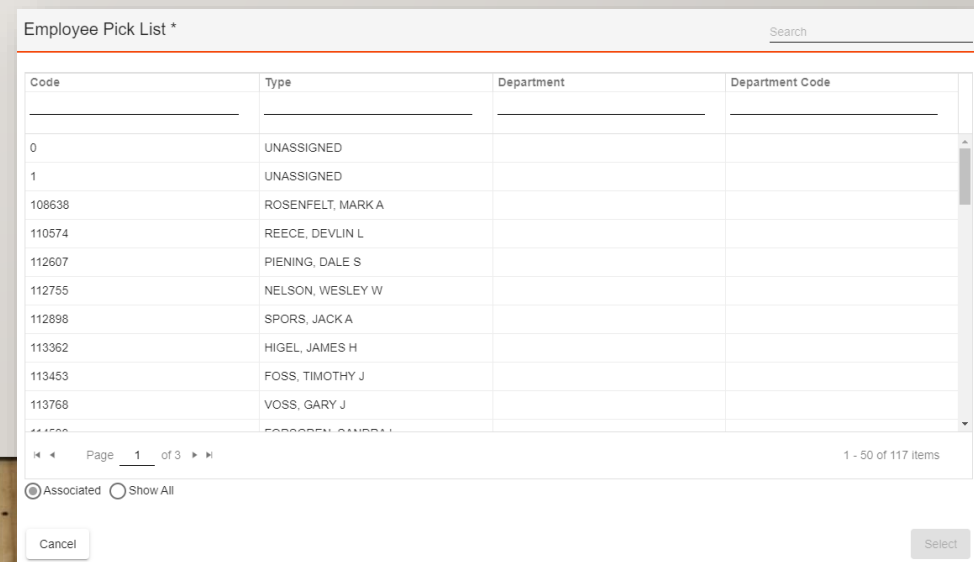


Employee Pick List *

114503 FORSGREN, SANDRA L

Regular Time Hours: 3 Overtime Hours: 0

General Comment
Jacey test for WO trainings



Code	Type	Department	Department Code
0	UNASSIGNED		
1	UNASSIGNED		
108638	ROSENFELT, MARK A		
110574	REECE, DEVLIN L		
112607	PIENING, DALE S		
112755	NELSON, WESLEY W		
112898	SPORS, JACK A		
113362	HIGEL, JAMES H		
113453	FOSS, TIMOTHY J		
113768	VOSS, GARY J		
114503	FORSGREN, SANDRA L		

Page 1 of 3

1 - 50 of 117 items

Associated Show All

Cancel Select

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.


The screenshot shows a software interface for managing work orders. At the top, there are fields for ID (2020-07-00326), Date (7/12/2020), and a number (21501). Below this is a navigation bar with tabs: Assets (1), WO Checklist (7), Work Order Tasks (1), Comments (0), PM/Work Templates (1), and Tracking (3). The 'Work Order Tasks' tab is selected and underlined in red. Below the navigation bar is a toolbar with icons for adding, editing, deleting, and other actions. A table displays the work order task details:

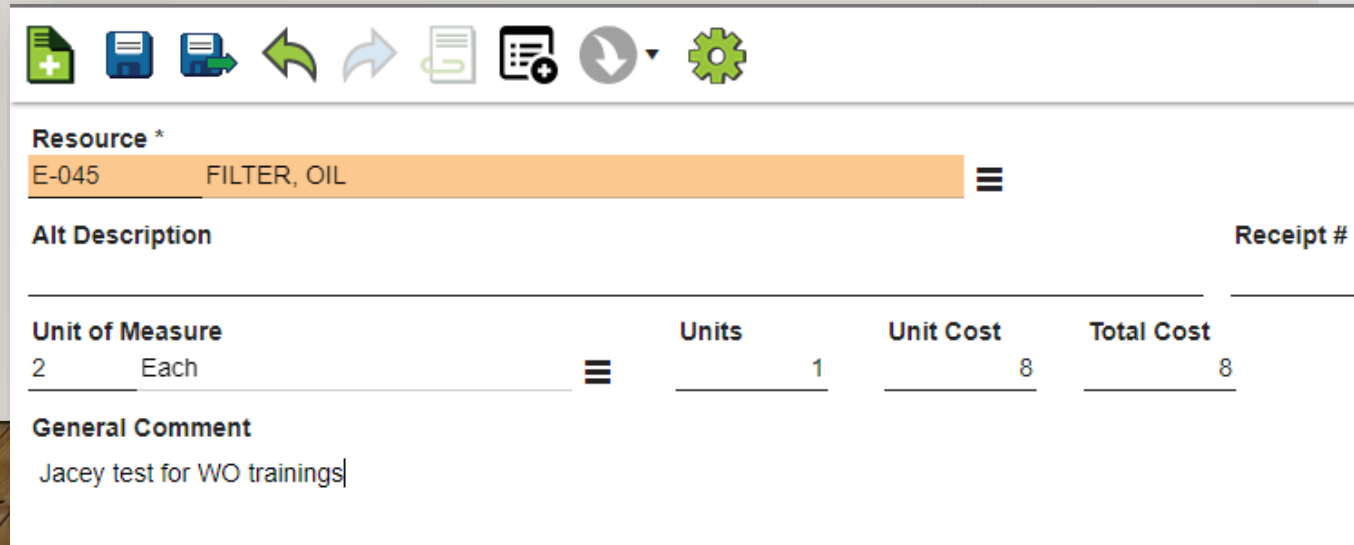
Task	Task Text	Start Date	End Date
E-B-PMA	ANNUAL PM FOR ALL B CLASS	7/27/2020	7/27/2020

Below the table is another navigation bar with tabs: Employees (1), Materials (0), Fluids (0), and Contractors (0). The 'Materials' tab is selected and underlined in red. Below this is another toolbar with icons. A table displays the material resource details:

Resource	Resource Text	Alt Description
No Records Found		

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. 

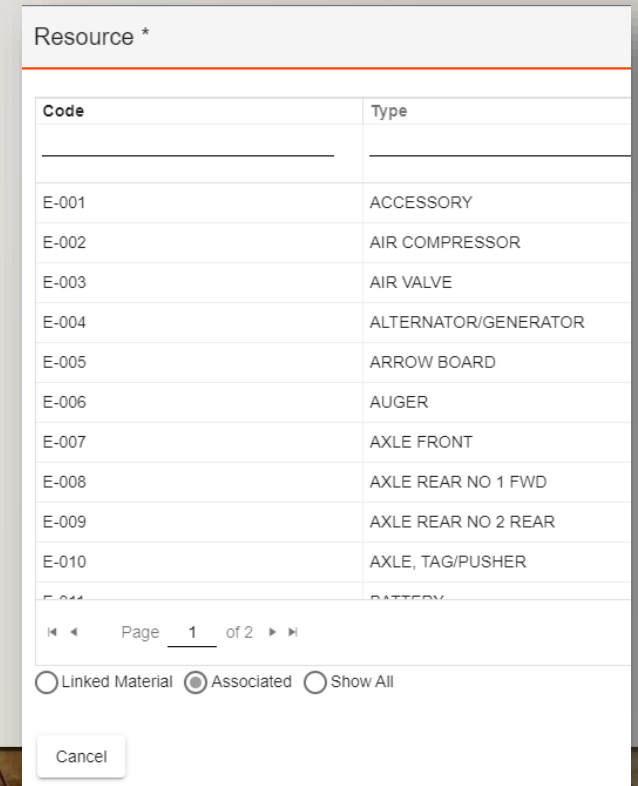


Resource *
E-045 FILTER, OIL

Alt Description **Receipt #**

Unit of Measure	Units	Unit Cost	Total Cost
2 Each	1	8	8

General Comment
Jacey test for WO trainings



Resource *

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

Page 1 of 2

Linked Material Associated Show All

Cancel

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!!

