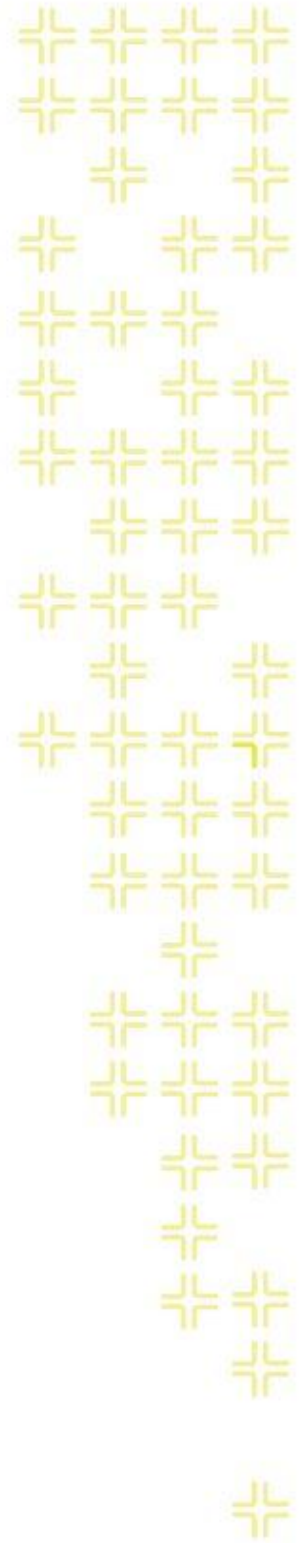




TRAINING GUIDE

Work Orders & Requests



Work Orders

The *Lucity* suite offers you a comprehensive solution for Work Management. The Work modules allow you to establish your work flow, track customer requests, create work orders, establish a preventative maintenance plan, set priorities, provide timetables, track system rehabilitation, and perform budget forecasting.

In this booklet, we'll begin by discussing how to create Work Orders using the *Work* module, asset modules, and the GIS system. Then, we'll explain how to complete and close a work order. We'll also discuss the *Requests* module, and show you how to create a Work Order from a Request.

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Work Orders

The *Work Orders* module allows you to schedule and track work tasks, personnel, equipment, and material usage. There are three versions of work orders offered in the desktop: *Standard*, *Lite*, and *Daily Work*. The Lucy Web work module interface will also display a different, customized interface into the work order module.

All of these interfaces integrate with the same data set. The *Standard* module is the most comprehensive of the three, offering additional functions such as cost, billing, and tracking. *Work Order Lite* contains only the basic functions of the *Work Order Standard* module. This allows for quick and easy data entry. The *Daily Work* module is the most basic of the three designed for quick data entry without your fingers ever having to leave the keyboard. The web interface allows an administrator at your organization to completely customize the views, fields, and available selections for a specific user or group. Each group might see a completely different customized interface.

Creating a Work Order in the Desktop

As explained above, three work order modules are available in the desktop. In this section, we'll discuss the *Standard Work Order* module, the most comprehensive of the three. To create a work order:

1. Open the *Work Order* module by selecting from the menu **Work>>Work Orders>>Standard**.
2. Click *Add* button  on the toolbar to enter *Add Mode*.
3. You'll typically enter information into following critical tabs:
 - **WO** - Containing general information about the Work Order.
 - **Tasks and Resources** - Indicating what the job is, who it's assigned to, and what materials will be used.
 - **Location AND/OR Asset** - Indicating where the job is or what specific asset will be worked on.
 - **Costs** - Stores cost information, such as quantity used, cost of materials, cost of labor, total duration of project, contractor costs, etc.

Header Information

- Enter a **Category**. This is required; it indicates which problems, causes, assets, and tasks are available in the rest of the work order.
 - For our example, we've selected the Sewer Pipe Category
- Select a **Problem** if necessary.
 - Here, we've chosen the Blockage problem.
 - Note that any default data associated with the problem in *Work Flow Setup* will be carried over when you make your selection.
- Select a Main Task.
 - We've selected the associated main task, Pipe Flushing.




WO Tab

- Select a Supervisor.
 - In our example below, the Supervisor, Rick Honas and Immediate Priority, was carried over automatically when we selected the Blockage problem in the header. For additional information on setting up your work flow, please consult the related workbook, *Work Flow Setup*.
- You may select an Assigned Date, Start Date, and End Date, if known.
- You may select a Lead Worker, if known.

Location OR Asset Tabs


- An asset is any individual item your organization maintains. For example, it could be a vehicle, a stretch of roadway, or a sewer manhole. Typically you will either include an asset OR a location on a work order. Either will indicate where the job is located, but adding an asset will also have the benefit of keeping a history of work against that asset.
- Open the **Location** tab. Enter Comments for crew: “Standing water and sewage material present. Clean and then flush sewer.”
- You’ll see the locations listed in the **Work Order Location** grid at the bottom of the screen.

- To add a location to the grid, right click in the grid and select *Add Record*.
- A new form will open allowing you to enter one or more locations.

- Enter the address, general location, and any other details needed.
 - As you can see in the example above, this problem is located 1065 S. Wanda Dr.
- Save  the record. You can now add  another address, or Close  the Work Locations form.
- Any addresses you entered will appear in the Work Order Location grid.
- Open the **Assets** tab. The assets are listed in the grid. To add an asset, right click in the grid and select *Add Record*. A new form will open.

The Assets form displays the 'Sewer Pipe' category selected in the 'Category' field. Below this, a table lists various assets with columns for Alt Pipe ID, Pipe Rec #, US Structure, DS Structure, and Dia/Height (in). The first row is highlighted in blue.

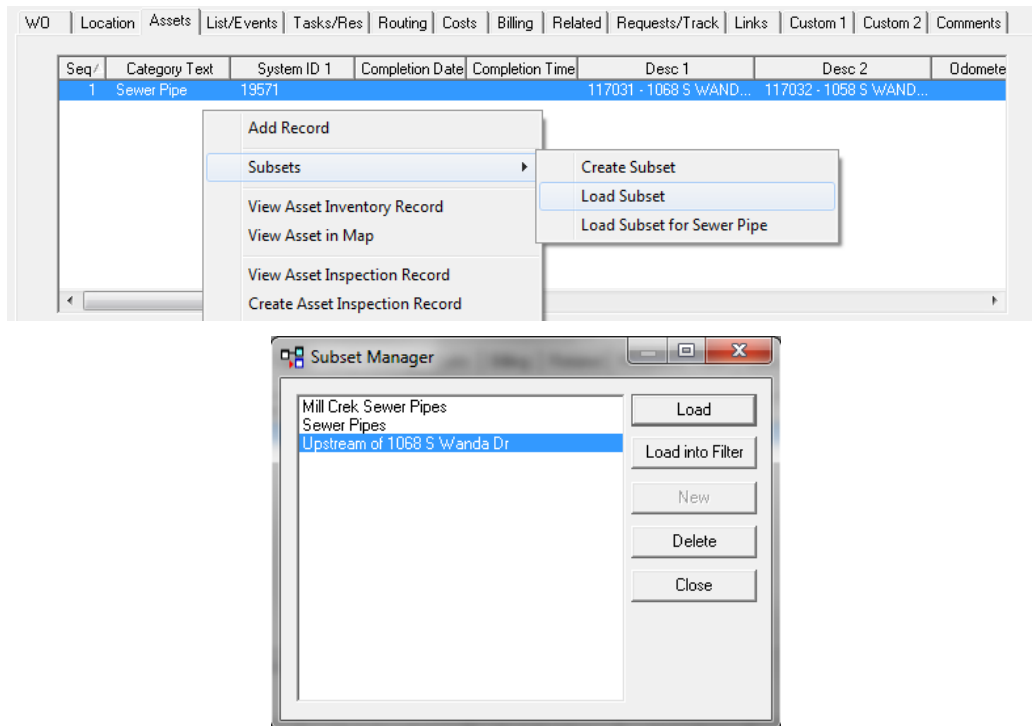
Alt Pipe ID	Pipe Rec #	US Structure	DS Structure	Dia/Height (in)
116378	16334	116378	116379	8
116991	16513	116992	116991	8
124756	18491	124756	124719	36
127423	16499	127425	127423	10
127424	19567	127423	127424	10
127425	16500	127440	127425	10
15580	28856	D13086	D13072	
15581	28849	113469	573376	8
15582	28850	573376	113488	8
15583	28851	113619	876432	8
15584	28852	876432	113618	8
15585	28853	113490	6738783245	8
15586	28854	6738783245	113489	8
15587	15587	113495	113497	8
15601	15601	113486	127237	8
15602	15602	113487	113486	8
15603	15603	113493	113494	8

- On the Assets form, note that the Object Type (the type of asset you can add to your work order) is dictated by the **Category** chosen in the **Header**.
 - In this example, we have selected Pipe Maintenance as the category. This allows us to include sewer pipe assets in the work order.
 - You can select a different category, which allows you to add assets of different types.
- Click the **System ID 1** button. These System IDs identify our assets.
- Based on your Category, an Asset listing will pop up. Highlight an asset and click select.
 - In our example, the pick list contains sewer pipes in our network. We've selected structure number 19571 for the sewer pipe located on S. Wanda Dr., our work location.
- Save  the Asset record and the Asset will now be listed in your Work Order. You can add as many assets as you like.

The Work Orders - No Filter form displays the 'Assets' tab. It shows a table with columns for Seq, Category Text, System ID 1, Completion Date, Completion Time, Desc 1, Desc 2, and Odometer. The first row is highlighted in blue.

Seq	Category Text	System ID 1	Completion Date	Completion Time	Desc 1	Desc 2	Odometer
1	Sewer Pipe	19571			117031 - 1068 S WAND...	117032 - 1058 S WAND...	

- You can also create or load **Subsets** in the **Assets** tab. Subsets are groups of filtered records from one module that can be viewed in related modules.
 - For example, you can create a subset of sewer pipes in the *Pipe Inventory* module and then load that subset into the Work Order Asset grid.
 - You can also create a subset from a GIS map by selecting a set of features and saving them as a subset. You can then view the subset in *Lucity GIS* or another related module. These too can be added into the Work Order.
- To load a subset into the Assets grid, right click in the grid and select **Subsets>>Load Subset for Sewer Pipe**. The Subset Manager will appear:





- This dialog displays all available subsets of the asset type indicated by your selections in the header. Since the Category we chose in this example is for Pipe Maintenance, only sewer pipe subsets will be displayed.
 - In our example above, we can see the Upstream of 1068 S. Wanda Dr. subset, created specifically for this work order in the *GIS Desktop*. We have chosen to load the subset, containing three pipe records.

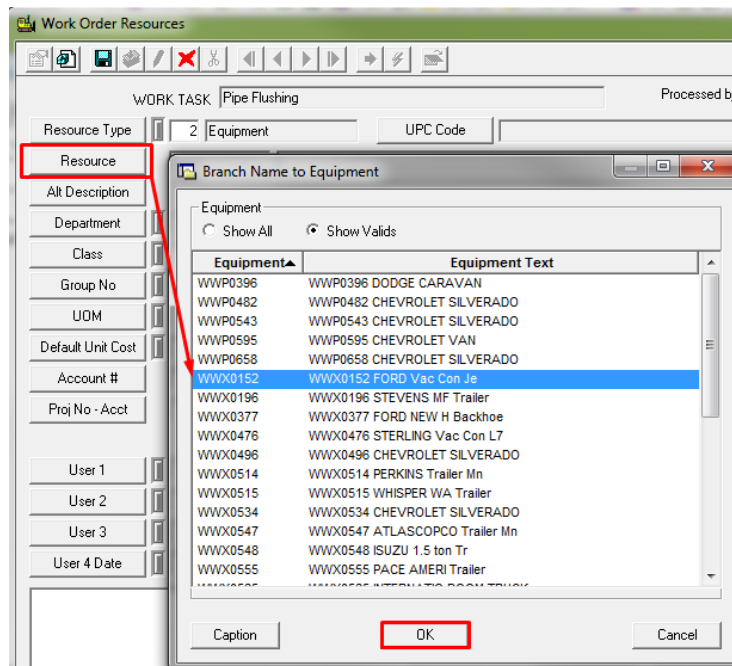
Seq/	Category Text	System ID 1	Completion Date	Completion Time	Desc 1	Desc 2	Odomete
1	Sewer Pipe	19571			117031 - 1068 S WAND...	117032 - 1058 S WAND...	
2	Sewer Pipe	19569			117027 - 2065 E CATH...	117029 - 1108 S WAND...	
3	Sewer Pipe	19570			117028 - 2001 E W&RN...	117029 - 1108 S WAND...	
4	Sewer Pipe	22128			117029 - 1108 S WAND...	117030 - 1078 S WAND...	

Tasks & Resources Tab

- This tab contains two grids: Tasks and Resources. In the first, you'll include the task (the job to be completed). In the second, you'll name the resources used (employees, equipment, materials, fluids, contractors).
- An individual Task has the resources listed against it. You can name more than one task on a Work Order if necessary, but it is recommended to keep it simple by including only one.
- Resource entries contain details including the dates worked, hours worked for employees, units used for other resource types (materials, fluids, etc.), and the Project Number the work is assigned to. This is very important because it feeds information back to Project Management, Timesheets (labor hours), or Inventory Control (amount of parts used).

These details might also be feeding information about the job back into another integrated financial system that helps manage project costing and budgeting, or payroll.



- To add a **Task**, right click in the **Work Tasks** grid and select *Populate Main Task*.
- To add a different **Task**, right click in the **Work Tasks** grid and select *Add Record*. The Work Order Tasks form will open.
 - Click the **Task** button to pop-up the task list. Select a Task from the list.
 - Click Save  and Close  the Work Order Tasks form. The task you selected will now appear on the work order.
- To add **Resources**, right click in the resources grid and select *Add Record*. The Work Order Resources form will appear.
 - Select a **Resource Type** (1 = Employee, 2 = Equipment, 3 = Materials, 4=Fluid, 5=Contractor).
 - Click the **Resource** button to see a list of available resources of the type you selected; then, select a resource.
 - In our example below, we've selected the equipment 'WWX0152 FORD Vac Con Je'.

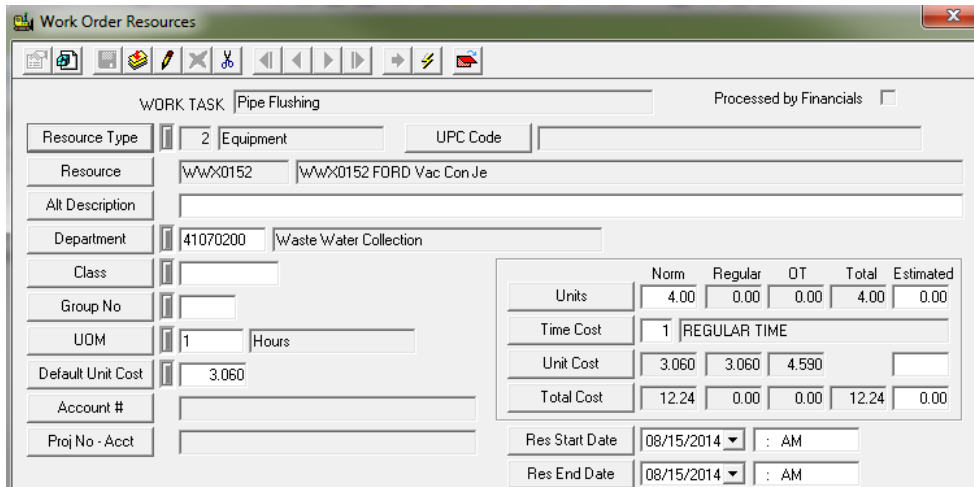


The screenshot shows the 'Work Order Resources' form with the 'Resource Type' set to '2 Equipment'. The 'Resource' button is highlighted with a red box. A modal window titled 'Branch Name to Equipment' is open, displaying a list of equipment. The entry 'WWX0152 FORD Vac Con Je' is selected and highlighted in blue. The 'OK' button in the modal is also highlighted with a red box.

Equipment	Equipment Text
WWP0396	WWP0396 DODGE CARAVAN
WWP0482	WWP0482 CHEVROLET SILVERADO
WWP0543	WWP0543 CHEVROLET SILVERADO
WWP0595	WWP0595 CHEVROLET VAN
WWP0658	WWP0658 CHEVROLET SILVERADO
WWX0152	WWX0152 FORD Vac Con Je
WWX0196	WWX0196 STEVENS MF Trailer
WWX0377	WWX0377 FORD NEW H Backhoe
WWX0476	WWX0476 STERLING Vac Con L7
WWX0496	WWX0496 CHEVROLET SILVERADO
WWX0514	WWX0514 PERKINS Trailer Mn
WWX0515	WWX0515 WHISPER WA Trailer
WWX0534	WWX0534 CHEVROLET SILVERADO
WWX0547	WWX0547 ATLASCOPO Trailer Mn
WWX0548	WWX0548 ISUZU 1.5 ton Tr
WWX0555	WWX0555 PACE AMERI Trailer

- Once you select the resource, the default data from the *Work Flow Setup, Resources* module will be carried over.
 - As you can see in our example, the default department (Waste Water Collection), unit of measure (Hours), and unit cost (\$3.06) has all been carried over from the Work Flow Setup - Equipment module.
- You can then enter the resource units used for this job. For employees and equipment, the units are hours. For materials, the units may be measured by feet, gallons, etc.
 - For this example, enter 4, representing the number of hours of use.
- For employee resources, a *Time Cost* of Regular Time is entered automatically; however, this can be changed.

- Enter the dates the resource worked on the job. The Start Date and End Date must be the same. This means that an **INDIVIDUAL RESOURCE ENTRY** is required for each resource on each job for each day.
- Click Save  and Close  the Work Order Resources form. The resource you selected will now appear on the work order.



WORK TASK: Pipe Flushing

Processed by Financials: ☐

Resource Type: 2 Equipment

Resource: WWX0152 WWX0152 FORD Vac Con Je

Alt Description:

Department: 41070200 Waste Water Collection

Class:

Group No:

UOM: 1 Hours

Default Unit Cost: 3.060

Account #:

Proj No - Acct:

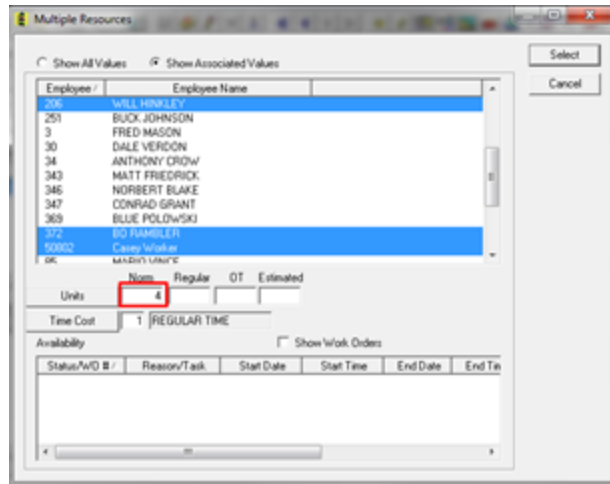
	Norm	Regular	OT	Total	Estimated
Units	4.00	0.00	0.00	4.00	0.00
Time Cost	1	REGULAR TIME			
Unit Cost	3.060	3.060	4.590		
Total Cost	12.24	0.00	0.00	12.24	0.00

Res Start Date: 08/15/2014 : AM

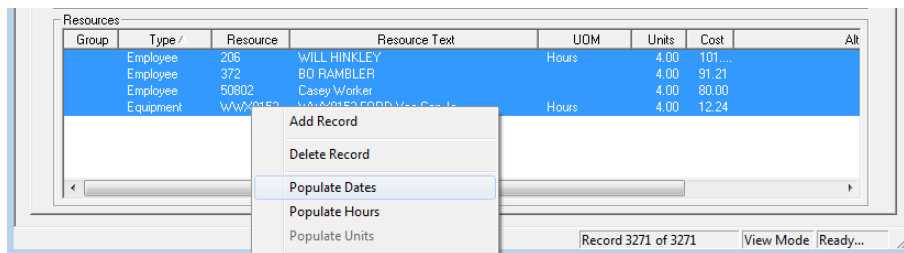
Res End Date: 08/15/2014 : AM

Adding Multiple Resources to Work Orders

- To save time when entering several resources of the same type (for instance several employees); you can work with multiple records. First, *Add Multiple* lets you select several employees rather than using *Add Records* to add one at a time. Just right click in the **Resources** grid, highlight *Add Multiple*, then select *Employees*. This will open the Multiple Resources form.
- The Multiple Resources form lists all the resources of a given type. You can select more than one record by pressing and holding the Control key (Ctrl) and clicking each entry you wish to select. (This is a standard Windows function.)
- Highlight each resource that belongs on the Work Order. Once you've selected the records you want, enter the number of units (In this case we are entering 4 hours), press *Select* and they'll be placed on the Work Order.



- Now that you have several resources listed in the **Resources** grid, you can add information to them in groups. Using the Ctrl key, highlight several records, right click on them, and select *Populate Dates*. A form with Start and End Dates will appear and the dates you enter will be applied to all resources you had highlighted. Of course, you can go back and change dates on individual resource records if needed.



Notes: _____

Costs Tab

- This tab allows you to store cost information, such as quantity used, hours of equipment/vehicle use, cost of materials, cost of labor, and total project duration.
- The three columns on the right-hand side of the screen allow you to compare your Actual work order costs with your estimated work order costs. You can use these columns in two ways: You can manually enter cost data into the fields provided, or have this data carried over from the Task information on the Tasks/Resources tab.
 - As you can see below, we've marked the "Use Task Info" checkbox below the Actual column. Thus, the system has carried over the actual labor hours, material cost, equipment costs, etc. based on what we entered in the Tasks/Resources tab.
 - Alternatively, we have not marked the "Use Task Info" checkbox below the Estimated column. Instead, we've manually typed estimated labor hours and costs into these fields.
 - The system has then automatically calculated the difference between the Actual cost information on the Task/Resources tab and the Estimated values we entered. As you can see below, the work order cost \$19.80 less than we estimated.

Work Order # 2014-00397

Status

Status Date 08/15/2014 11:28 AM

Category 21200 Sewer Pipe

Problem WWCPPBLK Blockage

Main Task WVEPPFLS Pipe Flushing

W/D Location Assets List/Events Tasks/Res Routing **Costs** Billing Related Requests/Track Links Custom 1 Custom 2 Comments

Projected Compl 08/15/2014 : AM Lock

Repair

Subcontractor

Profit Center

Quantity 789.90 Lock

UOM LF Linear Feet

Unit Cost 0.36

W/D Hours 0.00

	Actual	Estimated	Difference
W/D Duration	0.00	0.00	0.00
Labor Hours	12.00	10.00	-2.00
Labor Costs	272.56	250.00	-22.56
Material Cost	0.00	0.00	0.00
Fluid Cost	0.00	0.00	0.00
Equipment Costs	12.24	15.00	2.76
Contractor Costs	0.00	0.00	0.00
Misc. Costs	0.00	0.00	0.00
Total Cost	284.80	265.00	-19.80

Use Task Info ☒


Record 3271 of 3271 Edit Mode Ready...

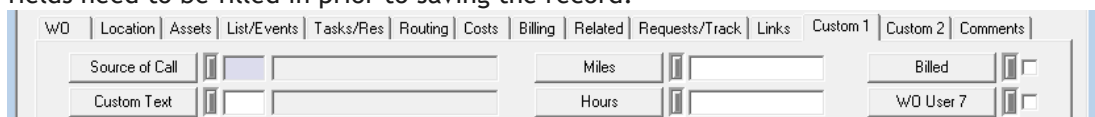
Several other fields on the Costs tab have special functions. Many of these fields are calculated by the system. These special functions are described below:

- **Projected Completion Date** - This is a calculated field. It represents Start Date + Estimated Duration.

- Quantity Field - This field may be automatically populated depending on how you defined the selected category in the *Work Flow Setup, Categories* module. If you assigned an inventory item to that category, UOM field would have been enabled.
 - The UOM field in the *Categories* module provides two options: Count and Sum. These options determine how this Quantity field will calculate assets. The “Count” option will count the number of assets in the Assets grid of the work order.
 - The “Sum” option will add the total measurements of the Assets listed. If you select “Sum”, you’ll need to include a UOM field to be summed. For instance, if you have linear assets such as pipes, you would probably want to add the length of the pipes; therefore, you would list the NT_LENGTH field in the UOM field. This commands the system to add the total length of all pipe assets in the Assets grid.
 - For additional information on setting up your Category to sum or count assets, consult the related workbook, *Work Flow Setup Training*.
- Lock Checkbox - When marked, the Lock checkbox allows you to enter the Quantity manually instead of having it automatically populated by the system. It also locks the quantity entered so that any changes made in the Assets grid will not affect this field.
- Unit Cost - This field provides the unit cost for the entire work order. It is automatically populated based on the Total Cost field and the Quantity field (Total Cost/Quantity = Unit Cost).
- Total Cost - These fields automatically sum the Estimated column, Actual Column, and the Difference column to show you the total cost for each. Remember, we discussed how these three columns are used on the previous page.

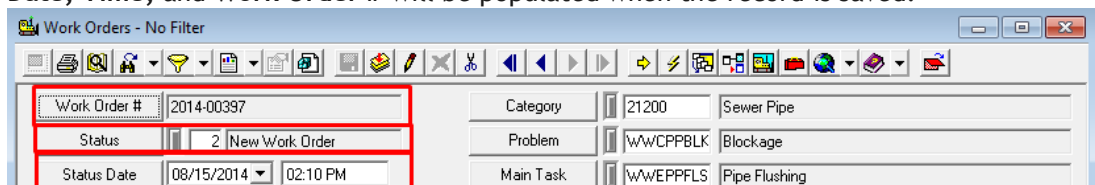
Saving the Work Order

- When you are done entering in all the necessary information, you will want to click Save . This automatically generates a work order number for the record. Depending on your organization’s workflow, this work order may now be “assigned” based on department, supervisor, task, etc. The way these get assigned may be based on a specific filter for “New Work Order” statuses and other fields. You can also set up notifications to trigger an e-mail to be sent out based on these fields.
- In this case, when we went to save our work order, it jumped to our “Custom 1” tab, because there was an additional required field that needed to be populated. All colored fields need to be filled in prior to saving the record.



The screenshot shows a software interface with multiple tabs: WD, Location, Assets, List/Events, Tasks/Res, Routing, Costs, Billing, Related, Requests/Track, Links, Custom 1, Custom 2, and Comments. The 'Custom 1' tab is active. It contains several input fields: 'Source of Call', 'Miles', 'Billed' (with a checkbox), 'Custom Text', 'Hours', and 'WO User 7' (with a checkbox).

- The **Status** field will automatically be populated with 2—New Work Order. The **Status Date, Time, and Work Order #** will be populated when the record is saved.



The screenshot shows a window titled 'Work Orders - No Filter'. It contains a table of work order data. The first row is highlighted with a red border, indicating the current record. The fields are:

Work Order #	Status	Status Date	Time	Category	Problem	Main Task
2014-00397	2 New Work Order	08/15/2014	02:10 PM	21200 Sewer Pipe	WWCPPBLK Blockage	WwEPPFLS Pipe Flushing

Creating a Work Order in the Web


The Lucy Web interface allows you to create work orders through a completely customized web interface on a browser from a computer without having Lucy Desktop software installed. The interface of the dashboard you see when you log in, the grids and child records displayed for specific modules, and even the fields and selectable options in editable forms are all customized for you. These customizations may be based on the user logged in, or perhaps by department, or maybe used throughout an organization. Keep in mind that the custom interface seen in the below example may differ in other environments.

1. Open the *Work Order* view by selecting from the menu **Modules>> Work>> Work Orders**, or opening a Request view from the dashboard. Our previous work order shows up:

☆ My Open Work Orders

	Work Order #	Status Text	Status Date	Category Text	Problem Text	Main Task Text	Supervisor Text	Lead Worker Text	Emergency Level	Start Date
	2014-00397	New Work Order	8/15/2014	Sewer Pipe	Blockage	Pipe Flushing	RICK HONAS	Casey Worker	1	8/15/2014

Comments (0)
Locations (1)
Assets (4)
Tasks (1)
Work Order Tracking (6)
Work Orders (0)
Work Requests (0)
PM/Work Templates (0)

2. Click *Add a Record* button  on the toolbar to open up your default work order form. Once they get out there, they see that one of the pipes needs to be replaced. Let's schedule that work for the following day.

Add - Work Orders - Windows Internet Explorer

ACT Work Order Form

Work Order # Category*

Status Problem

Status Date Status Time Main Task

Supervisor* Emergency Level

Lead Worker Source of Call*

Department Comment From Request

Start Date Start Time

End Date End Time

Comment to Crew

COSTS

	WO Duration Actual	WO Duration Estimate	WO Duration Difference
<input checked="" type="checkbox"/> Use Task Est.	0.00	0.00	0.00
	Actual Labor Hours	Est Labor Hours	Labor Hour Diff
	0.00	0.00	0.00
	Actual Labor Cost	Est Labor Cost	Labor Cost Diff
	0.00	0.00	0.00
<input checked="" type="checkbox"/> Use Task Actual Costs	Actual Material Cost	Est Material Cost	Material Cost Diff
	0.00	0.00	0.00
	Total Fluid Cost	Est. Fluid Cost	Fluid Cost Diff
	0.00	0.00	0.00
	Actual Equip Cost	Est Equipment Cost	Equipment Cost Diff
	0.00	0.00	0.00
	Contractor Cost	Est. Contractor Cost	Contractor Cost Diff
	0.00	0.00	0.00
	Misc. Cost	Est. Misc. Cost	Misc. Cost Diff
	0.00	0.00	0.00
	Total Cost	Est Total Cost	Total Cost Diff
	0.00	0.00	0.00

85%

- The Work Order form is customized to match the workflow we did on the previous work order. We can start out by filling out:

- Category, Problem and Main Task

Category*
21200 Sewer Pipe

Problem
WWCPRRR Pipe Repair

Main Task
WWCPRRR Sewer Line Break Repair

- Supervisor, Lead Worker, Start/End Dates

Supervisor*
1 RICK HONAS

Lead Worker
50802 Casey Worker

Department
4108060 Water Distribution

Start Date
8/16/2014

End Date
8/16/2014

Emergency Level
4 Same Week Priority

Source of Call*
5 Other

Comment From Request
Reactive work from Work order #2014-00397 done on 8/15

- Comments

Comment to Crew
Pipe leaking when being flushed. Needs to be repaired.

- Leave costs alone for now. This will be populated once we add our task resources. Once all necessary information is filled in, hit save or save and close .

Child Relationship Records

- All the tabs we used on our desktop work order are displayed here. To view or enter child records, hit the view button . This will display all available views of related records.

Comments (0) Locations (0) Assets (0) Tasks (0)

Work Order Tracking (1) Work Orders (0) Work Requests (0) PM/Work Templates (0)

- First, let's add a location. We can enter in an address like before.

Location - Full Form

Location No.
1

Address
1068

Address 2
S WANDA DR

General Location

Loc City

Loc State

Loc Zip Code

Street Name
S WANDA

Loc Apart/Suite

Loc Parcel Number

Loc Country

Building Type

- Next, we can add an asset as we did previously. Click add, which opens up an Asset form. From here you can select the asset type (defaulted to match your Work Order category), and then from the asset list.

Category
21200 Sewer Pipe

Asset Type*
Sewer Pipe

Asset Rec #* [Filter]

Inspection Source Module

We used the filter button to find the specific pipe in the asset list.

ID	NUMBER UPSTREAM	NUMBER DOWNSTREAM	NUMBER BLDG	DIR	STREET	TYPE	SUFFIX
19571	19571	117031	117032	1068	S	WANDA	DR

- You can continue to add assets as you did in the desktop. The toolkit option allows you to add multiple assets:

Assets

General ...

Add Asset from Master Project

Add Assets From Map

Add Multiple Sewer Pipe Assets

Add Multiple Sewer Pipe Assets Where Default Category Is Sewer Pipe

Add Multiple Assets

- Or you can use the same subset tool we used in the desktop:

Subsets

21200 - Sewer Pipe

Change Selected Category

Name	Count	Last Modified By	Last Modified Date	Expiration Date
Mill Creek Sewer Pipes	75	Lucity	9/9/2013	
Sewer Pipes	453	Lucity	9/11/2012	
Upstream of 1068 S Wanda Dr	3	Lucity	8/15/2014	

My Subsets Only

For now, we'll stick with one asset.




- Next, we want to populate the main task. This is done with the toolkit item in the tasks grid.

Comments (0) Locations (1) Assets (1) Tasks (0)

Work Order Tracking (1) Work Orders (0) Work Requests (0) PM/Work Templates (0)

Tasks

Add Main Task

- We now have a few ways to interact with the task so that we can add in our resources. You can use the add  button to select tasks individually. You can also add multiple resources using the toolkit  button. We are going to use the editable grid  function, so that we can view and add employees, materials, equipment, etc. all at once.

2014-00398 - Sewer Line Break Repair (-)

26 valid Employees exist for this category. **Employees**

Employee	EmployeeText	Start Date	End Date	Regular Time Hours	Department	Department Text	Group Number
200	JASON PEPPER			8.00	41070200	Waste Water Collection	
50802	Casey Worker			8.00	1	Sewer	

31 valid Materials exist for this category. **Materials**

Material	Material Text	Alt Description	Start Date	End Date	Units	UOM	Unit Cost	Total Cost	Resource Comm
13416	Pipe, DI, 8"				8.00	Foot	15.000	120.00	

11 valid Fluids exist for this category. **Fluids**

Fluid	Fluid Text	Alt Description	Start Date	End Date	UOM	Units	Total Cost	Resource Comment
-------	------------	-----------------	------------	----------	-----	-------	------------	------------------

31 valid Equipment exist for this category. **Equipment**

Equipment	Equipment Text	Alt Description	Start Date	End Date	Units	UOM	Unit
VV/X0710	2005 CHEVY SILVERADO 1500				8.00	Hours	0.

0 valid Contractors exist for this category. **Contractors**

Contractor	Contractor Text	Alt Description	Start Date	End Date	UOM	Units	Total Cost	Document Available
------------	-----------------	-----------------	------------	----------	-----	-------	------------	--------------------

- Again, let's assign Casey to do the work on this work order. Simply type in the employee code or employee name, and the filter will search through all the valid options for the category. You can also type a space to pull up the entire list of valid employees. We will also add in an additional worker, Jason Pepper. We will be using 8 feet of Pipe and going out to do the work in a Chevy Silverado. Finally, we can populate the labor and equipment with 8 hours of work done.
- Once we've entered the resources, we can go back and open up the work order form to view the total calculated costs.

COSTS			
<input checked="" type="checkbox"/> Use Task Est.	WO Duration Actual	WO Duration Estimate	WO Duration Difference
	0.00	0.00	0.00
<input checked="" type="checkbox"/> Use Task Actual Costs	Actual Labor Hours	Est Labor Hours	Labor Hour Diff
	16.00	0.00	0.00
	Actual Labor Cost	Est Labor Cost	Labor Cost Diff
	330.35	0.00	0.00
	Actual Material Cost	Est Material Cost	Material Cost Diff
	120.00	0.00	0.00
	Total Fluid Cost	Est. Fluid Cost	Fluid Cost Diff
	0.00	0.00	0.00
	Actual Equip Cost	Est Equipment Cost	Equipment Cost Diff
	0.00	0.00	0.00
	Contractor Cost	Est. Contractor Cost	Contractor Cost Diff
	0.00	0.00	0.00
	Misc. Cost	Est. Misc. Cost	Misc. Cost Diff
	0.00	0.00	0.00
Total Cost		Est Total Cost	Total Cost Diff
450.35		0.00	0.00

Creating a Work Order from Within another Work Order

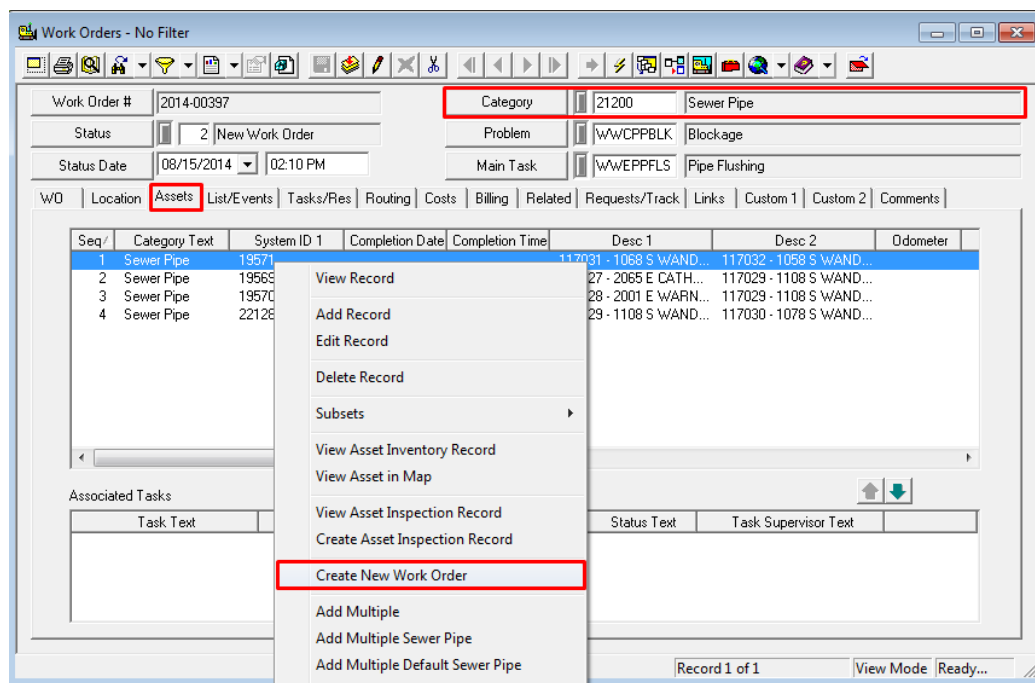
There are two ways that you can link work orders together. One way is to create a work order from within another work order or from a resulting task. The other way is to link them together after they've both been created. Let's go through the steps of linking using each of these methods in the desktop and, where available, the web.

Creating a Work Order from the Asset Grid in the Desktop

When you create a work order from the Asset grid, the Category you selected in the header and any assets listed in the grid will be carried over to the new work order record. These two records will then be linked in the Related Work Orders grid.

You may use this function if some of the assets in one work order need additional work done that is not covered by the tasks and resources selected in the current work order. For example, the work order we just created in the web could have had the duplicate asset automatically associated by creating it through this method. Follow the steps below:

1. Select the asset(s) you want included in the new work order. You can use the <Shift> or <Ctrl> keys to select multiple assets.
2. Right click and select *Create New Work Order*. You will be prompted to view the work order at this time. Click "Yes" and it will open immediately. Click "No" and it will not open, although it will still be created.



Notes: _____

- As you can see below, the new work order contains the same Category as the previous work order (Sewer Pipe) as well as the three assets you selected on the Assets tab.

Seq	Category Text	System ID 1	Completion Date	Completion Time	Desc 1	Desc 2	Odomete
1	Sewer Pipe	19571	117031 - 1068 S WAND...	117032 - 1058 S WAND...			

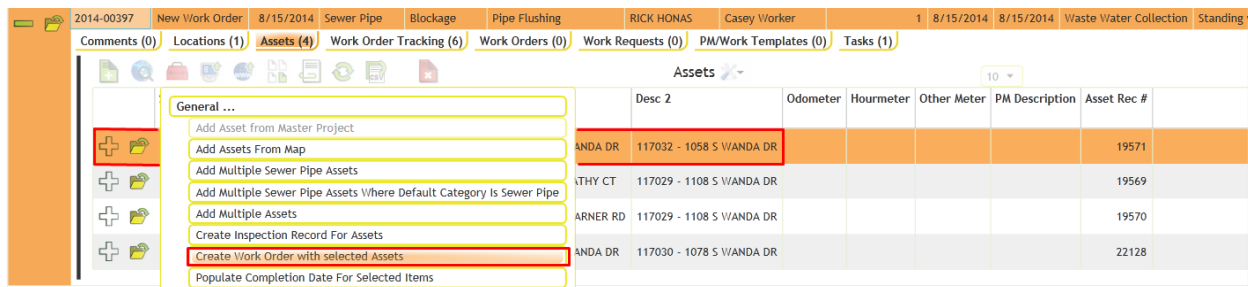
- The Related tab of both work orders will identify the related work order in the bottom grid. There, you'll see the related work order number, creation date, main task text, and additional information.

Work Order # /	W/O Creation Date	Main Task Text	Crew	Status Text	Start Date	End Date
2014-00397	08/15/2014	Pipe Flushing	New Work Order	New Work Order	08/15/2014	08/15/2014

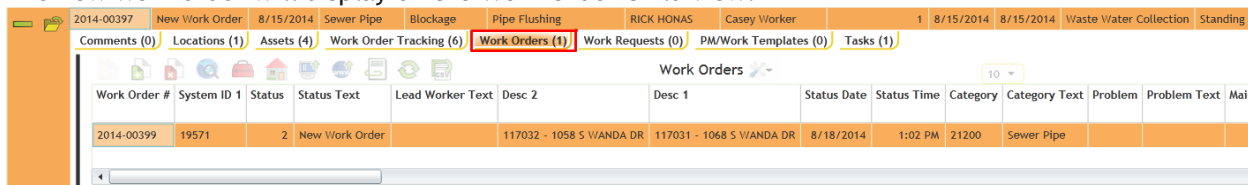
Notes: _____

Creating a Work Order from the Asset Grid in the Web

- To do this same function in the web, you will use the toolkit and select assets in the child grid of the work order.



The new work order will display on the Work Order child view.

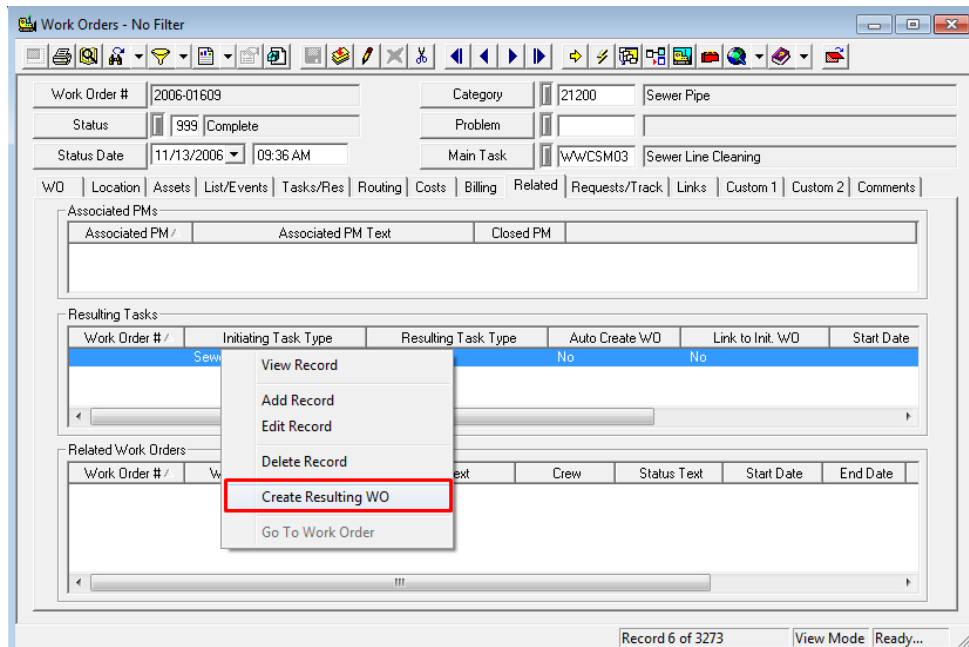


Creating a Work Order from a Resulting Task in the Desktop

When you create a new work order from the Resulting Tasks grid of an existing work order, the Category, all listed assets, start date, and task will all be carried over into the new work order record. Like before, the two work orders will be linked in the Related Work Orders grid.

To create a resulting task work order, complete the following steps:


- Select the task in the Resulting Tasks grid.
- Right click on the task and select *Create Resulting WO*. You will again be prompted to view the new work order.

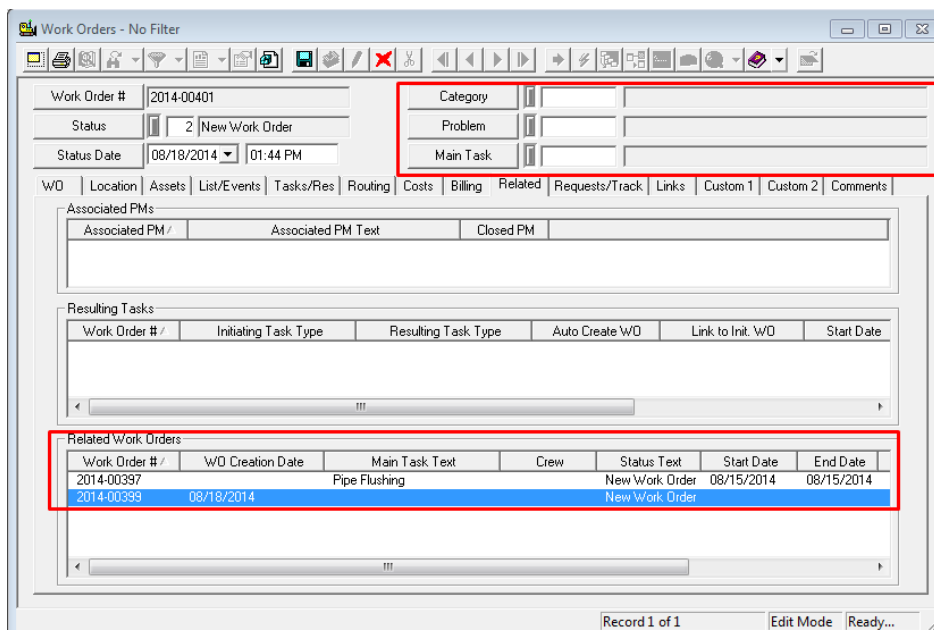


- Note that this option will be disabled if a work order already exists for the task. Only one work order can be generated per task.

Creating a Work Order from another Work Order in the Desktop

A third way in which you can create a work order from within another work order is by using the Create New Work Order button in the module toolbar. This will create a new, empty work order that is linked to the current work order in the Related Work Orders grid. This is useful when you want the current work order linked to a new one, but you don't want any data carried over into the new record.

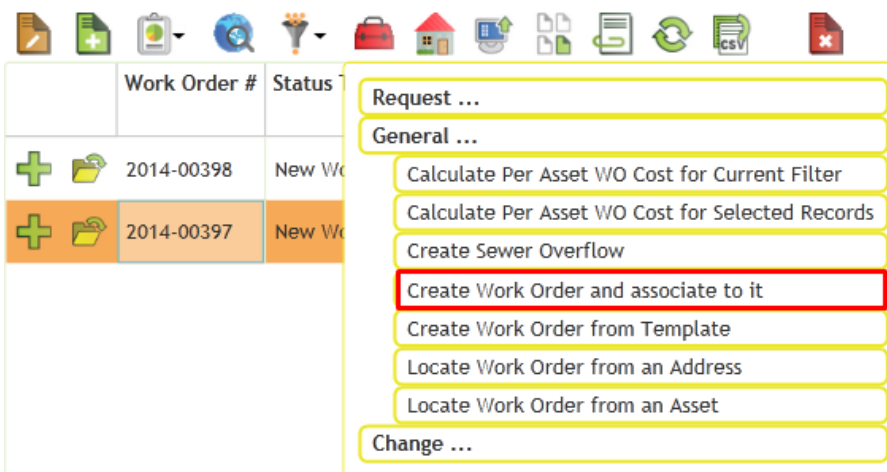
1. Click the  button on the module toolbar in the current work order.
2. Like before, you will be prompted to view the new work order.
3. As you can see below, the Category, Problem, and Main Task in the new work order's header are blank, but the related work order is identified on the Related tab.



Work Order #	W/O Creation Date	Main Task Text	Crew	Status Text	Start Date	End Date
2014-00397		Pipe Flushing		New Work Order	08/15/2014	08/15/2014
2014-00399	08/18/2014			New Work Order		

Creating a Work Order from another Work Order in the Web

4. To do this function in the web, we will again use the toolkit function. Once you have selected the work order record, click the toolkit button and choose the option "Create Work Order and associate to it".



Work Order #	Status
2014-00398	New Work Order
2014-00397	New Work Order

Request ...

General ...

Calculate Per Asset WO Cost for Current Filter

Calculate Per Asset WO Cost for Selected Records

Create Sewer Overflow

Create Work Order and associate to it

Create Work Order from Template


Locate Work Order from an Address

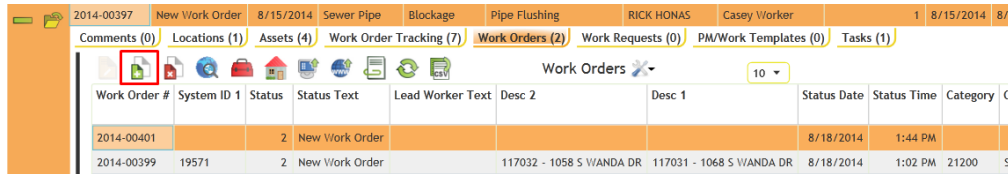
Locate Work Order from an Asset

Change ...

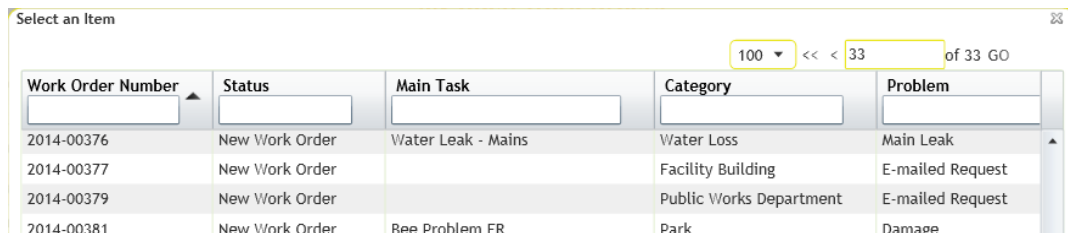
Linking to an Existing Work Order


Finally, there is one last method for linking a new work order to an existing work order. If the new work order has already been created independently of the original work order, you can go back and link them manually.

1. To do this in the web, go to the Work Orders tab for a work order record. You will select the Attach an Existing record  button from the work orders view.

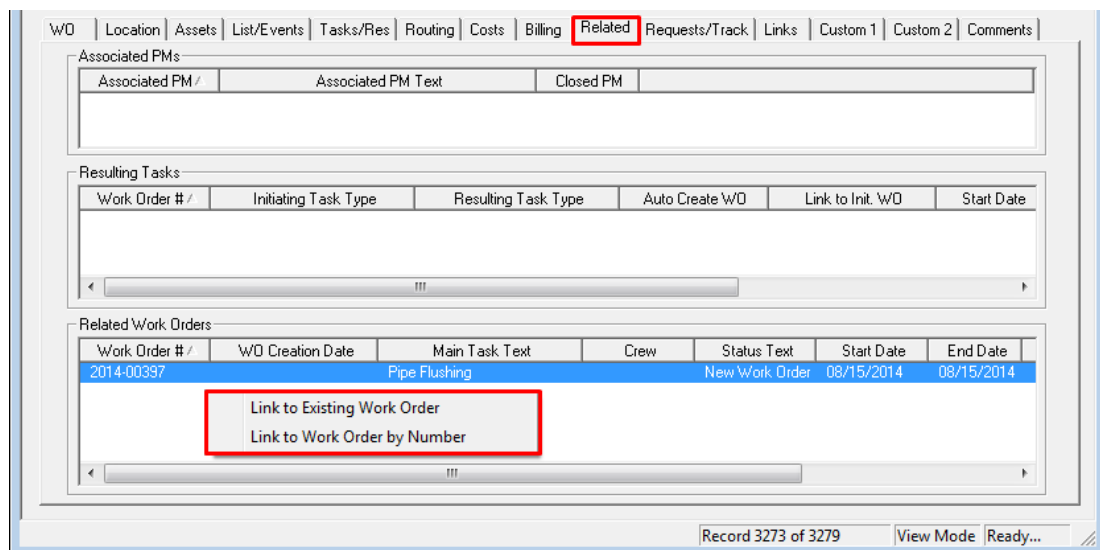


2. Filter for or search through the list for the work order you want to attach.



3. The work orders will now be linked to each other. You can also use the Detach Selected Records  button to remove the link.

1. In the desktop, you can go to the work order record, right-click in the “Related Work Orders” grid on the Related tab, and select link to Existing Work Order (by searching in a list) or Link to Work Order by Number (to type in a known work order number).




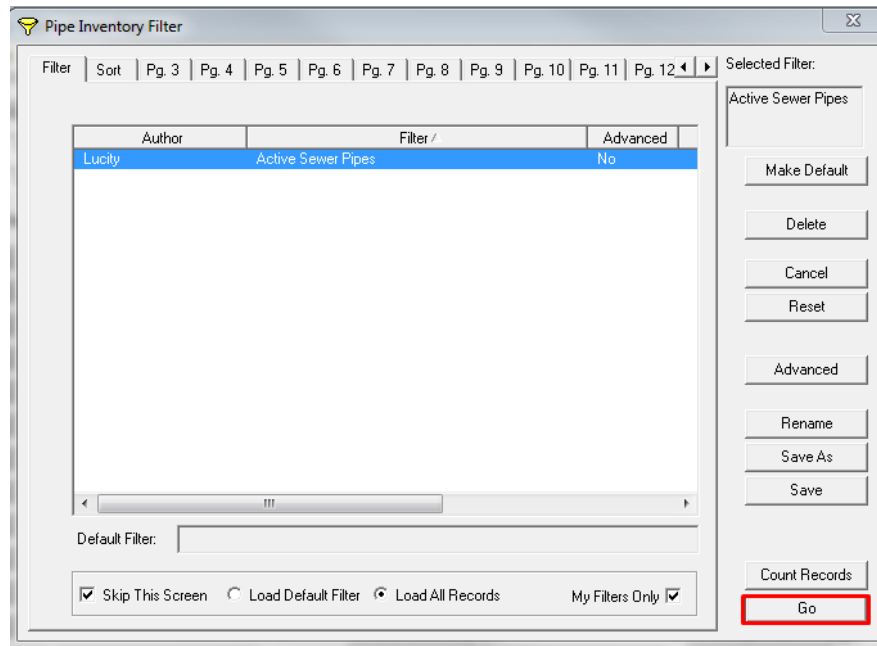
2. The work order will now be linked.


Creating a Work Order from an Asset Inventory Record

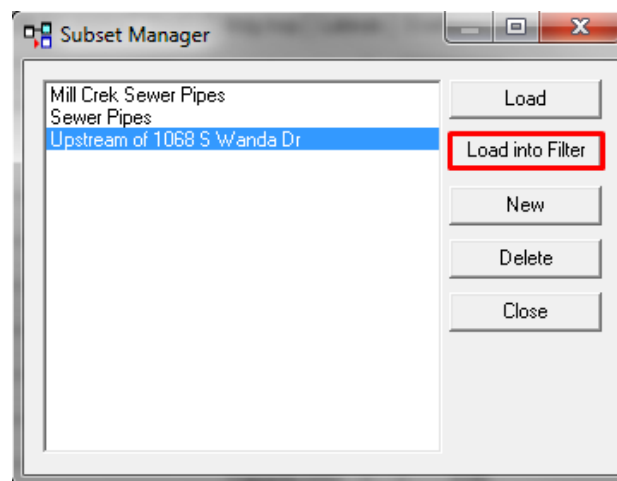
Another way to create a work order is by creating it directly from the asset that will be worked on. This will include the asset and location information in the new work order. Let's look at an example using the upstream Sewer Pipe records that we didn't replace.

Creating a Work Order from the Asset in the Desktop

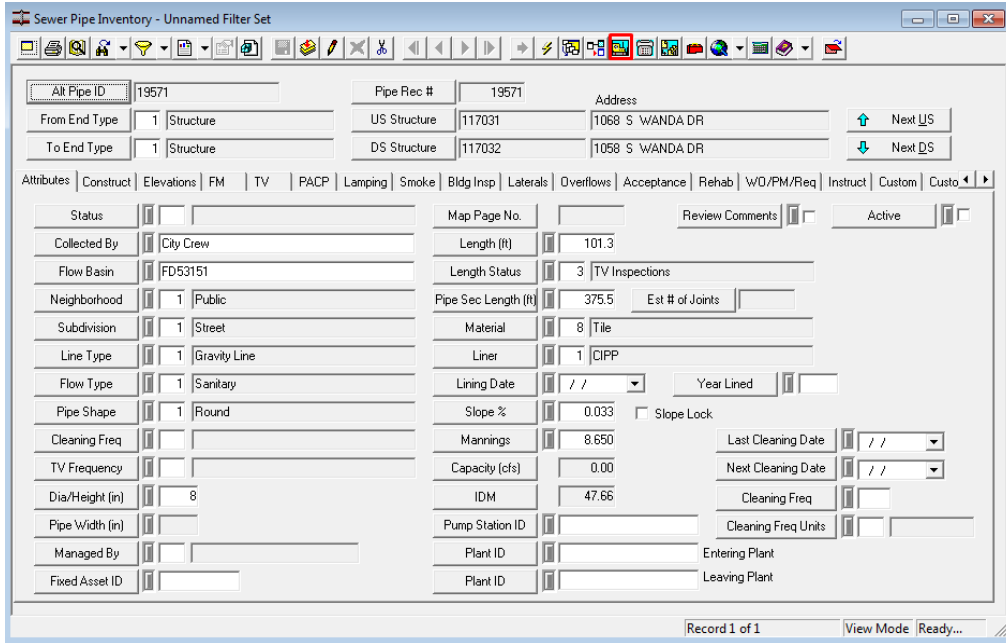
1. First, you will need to select the asset record(s) that you want to create work on. We will load a filter of all our "Active" pipes using the filter  button. Select "Go".



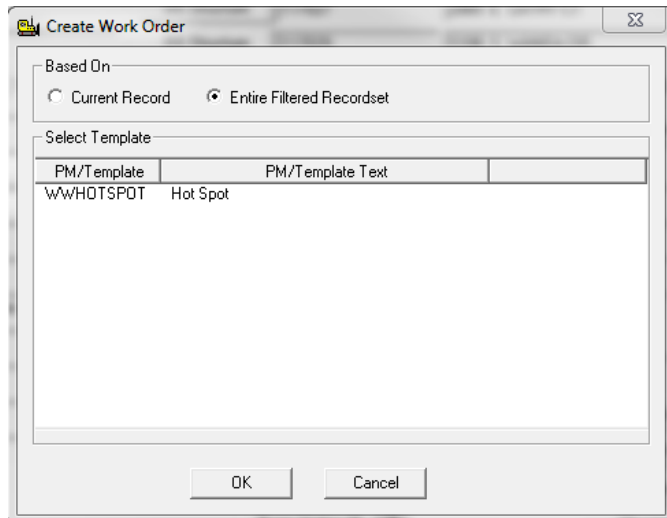
2. Next, let's load the subset of sewer pipes we created that were upstream of our pipe break using the load subset  button. Load the "Upstream of 1068 S Wanda Dr" subset into the Filter.



3. Click on the Create New Work Order  button.



4. You'll need to select which records are included in the work order.
- If you select 'Current Record', the new work order will include information on the current asset record only.



- By selecting 'Entire Filtered Recordset', the new work order will contain all assets included in the current filterset.
5. Next, you can also choose a PM Template for the work order from the list. This is not required.
- For our example, we'll be creating a work order based entire filtered recordset, and without using a PM Template.

6. Click **OK** to create the work order.
7. When the work order is generated, the asset information will be entered into the WO tab and Asset tab. The default category for the selected assets will appear in the header. Default information associated with the category will be entered by the system. For additional information on setting up this default data, please consult the related workbook, *Work Flow Setup*.

Work Order # 2014-00403

Status 2 New Work Order

Status Date 08/18/2014 02:11 PM

Category 21200 Sewer Pipe

Problem

Main Task

WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments

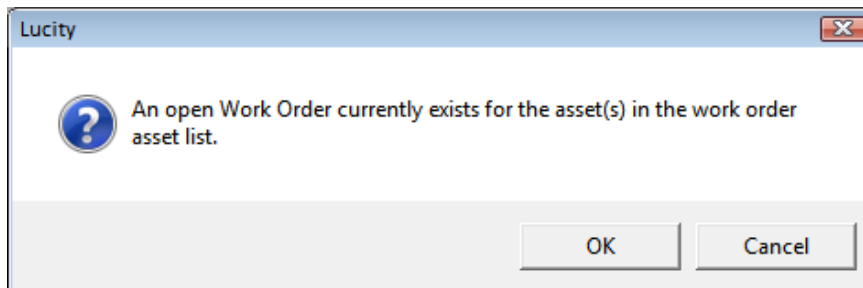
Seq	Category Text	System ID 1	Completion Date	Completion Time	Desc 1	Desc 2	Odomete
1	Sewer Pipe	19569			117027 - 2065 E CATH...	117029 - 1108 S WAND...	
2	Sewer Pipe	19570			117028 - 2001 E WARN...	117029 - 1108 S WAND...	
3	Sewer Pipe	22128			117029 - 1108 S WAND...	117030 - 1078 S WAND...	

Associated Tasks

Task Text	Cost	Task Start Date	Task End Date	Status Text	Task Supervisor Text

Record 1 of 1 Edit Mode Ready...

8. If there is an open work order for the asset the following pop-up will appear:



9. Click **OK** to create the work order or cancel to stop the process.

Notes: _____

10. Note that when you look back at the Asset Inventory record for any of those assets, you can see the work order we just created, as well as all previous work order history, on the WO/PM/Req tab in the Work Orders grid.

Sewer Pipe Inventory - Active Sewer Pipes

Alt Pipe ID: 19569 Pipe Rec #: 19569 Address: 2065 E CATHY CT

From End Type: 1 Structure US Structure: 117027 DS Structure: 117029

To End Type: 1 Structure

Attributes: Construct Elevations FM TV PACP Lamping Smoke Bldg Insp Laterals Overflows Acceptance Rehab **WO/PM/Req** Instruct Custom Custo

Default WO Cat: No WO/PM/Req

Work Orders

WO #	Main Task	Problem	Status	Status Date	End Date	Start Date	Completion Date
2014-00402			New Work Order	08/18/2014			
2014-00403			New Work Order	08/18/2014			
2014-00397	Pipe Flushing	Blockage	New Work Order	08/15/2014	08/15/2014	08/15/2014	08/15/2014

PMs

Code	Routine Text	Status	WO #	Next By Start	Next by End
------	--------------	--------	------	---------------	-------------

Requests

Status Date	Status	Request #	Problem	Cause	Name 1	Name 2	Busines
-------------	--------	-----------	---------	-------	--------	--------	---------

Record 1 of 1 View Mode Ready...

Creating a Work Order from the Asset in the Web

1. We are going to load the same filter for active pipes in the Sewer Pipe Inventory module in the web using the filter button.


Filters

Existing Applied

User Name	Filter Name	Is Advanced
Lucity	Active Sewer Pipes	<input type="checkbox"/>
GBA	Greater than 8in pipes	<input type="checkbox"/>
GBA	Pipes in Basin SD-561	<input type="checkbox"/>
GBA	Privately Owned Pipes	<input type="checkbox"/>
afowles	S15- Flow Basin	<input type="checkbox"/>

☐ My Filters Only








Cancel Run


- Once we've filtered for active pipes, we can also bring in our subset using the subset  button, and then load our subset into the existing filter.

Subsets

Name	Count	Last Modified By	Last Modified Date	Expiration Date
Mill Creek Sewer Pipes	75	Lucity	9/9/2013	
Sewer Pipes	453	Lucity	9/11/2012	
Upstream of 1068 S Wanda Dr	3	Lucity	8/15/2014	

☐ My Subsets Only

- Next we will use the create work order  button. If we only need to do extra work on 2 of these 3 pipes, in the web we can also select specific records in the current view on top of the filter and subset we've loaded. This time we will create it on the 2 Selected Records. We can also choose a PM Template to use from here, as well as having the option to create one single work order, or a separate work order for each record selected. Let's use this to create 2 separate Work Orders.

Sewer Pipes

Alt Pipe ID	US Structure	DS Structure	Status Text	Flow Basin	Owner Text	Location Text	Line Type Text	Flow T
19569	117027	117029		5251	Public	Street	Gravity Line	Sanita
19570	117028	117029						
22128	117029	117030						

Select options for create Work Order

Create Work Order(s) for...

☒ Selected Records
 ☐ Filtered Records

Where

☐ ALL share a single Work Order
 ☒ EACH Record has its own Work Order

You can only attach a template when creating just one WorkOrder.

PM/Template	PM/Template Text
VW/HOTSPOT	Hot Spot

Cancel OK

Notes: _____

- Once again you will be prompted if these assets are already on existing Open Work Orders.

Confirmation

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.)

Yes

No

- You may have access to multiple views in the web. If so, the next step will be to select which view you want to create the work order in. This may be important to be able to include the proper information for this specific work order.

Please Select a View

ACT Work Order View

Custom View

Eval Work Order Complete

GEN- LUCITY WOGF Review Equipment

Work Orders - Full

Cancel

OK

- Once the work orders have been created, they will open up in your selected view.

Newly Created WorkOrders

	Work Order #	Status Text	Status Date	Category Text	Problem Text	Main Task Text	Supervisor Text	Lead Worker Text	Emergency Level	Start Date	End Date	
	2014-00405	New Work Order	8/18/2014	Sewer Pipe								
	2014-00404	New Work Order	8/18/2014	Sewer Pipe								

- Once again, if we were to look back at one of these Sewer Pipe assets, we can see the work order we just created, as well as other historical work orders, by clicking on the Work Orders tab.

Sewer Pipes

Alt Pipe ID	US Structure	DS Structure	Status Text	Flow Basin	Owner Text	Location Text	Line Type Text	Flow Type Text	Length Status Text	Pipe Shape	Pipe Sh
19569	117027	117029		5251	Public	Street	Gravity Line	Sanitary	As-Built Drawings	1	Round

TV Inspections (0)

Line Lampings (0)

Smoke Tests (0)

Building Inspections (0)

PACP Inspections (0)

Observation Manholes (0)

Pipe Air Testing (0)

Pipe Mandrel Testing (0)

Laterals (0)

Work Orders (4)

Work Requests (0)

PM/Work Templates (0)


Work Orders

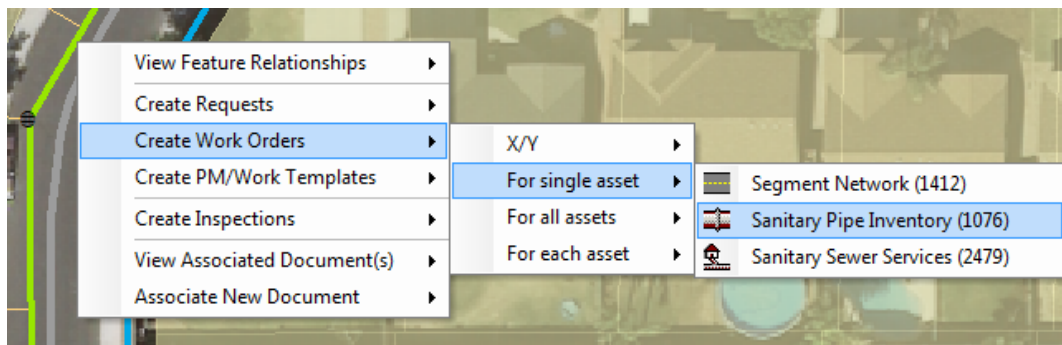
Work Order #	System ID 1	Status	Status Text	Lead Worker Text	Desc 2	Desc 1	Status Date	Status Time	Category	C
2014-00404	19569	2	New Work Order		117029 - 1108 S WANDA DR	117027 - 2065 E CATHY CT	8/18/2014	2:39 PM	21200	S
2014-00403	19569	2	New Work Order		117029 - 1108 S WANDA DR	117027 - 2065 E CATHY CT	8/18/2014	2:11 PM	21200	S
2014-00402	19569	2	New Work Order		117029 - 1108 S WANDA DR	117027 - 2065 E CATHY CT	8/18/2014	2:10 PM	21200	S
2014-00397	19571	2	New Work Order	Casey Worker	117032 - 1058 S WANDA DR	117031 - 1068 S WANDA DR	8/15/2014	2:10 PM	21200	S

Creating a Work Order from GIS

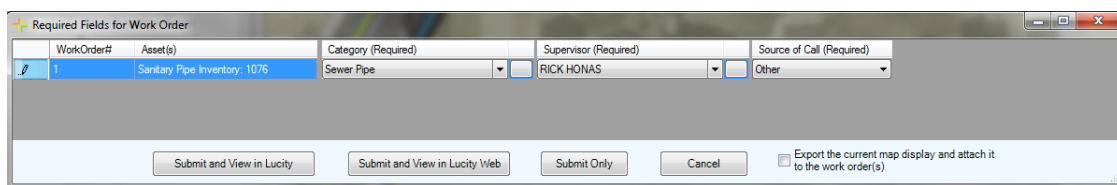
In addition to creating work orders from within the desktop, we also provide a tool to create work orders directly from GIS Desktop or GIS Web.

Create a Work Order from GIS Desktop in ArcMap

1. Open your map project in ArcMap.
2. Click on the Open Module tool  on the Lucy GIS toolbar.
3. Right click on a feature in the map. You'll see the menu pictured below.
4. Select Create Work Order and then select which asset or X/Y coordinate you would like associated with the new work order. All available asset types will appear in the list.
 - You have the ability to create work orders for a single asset, all assets (a single work order with all selected assets on it), or each asset (separate work orders for each asset selected).
 - In the example below, we've chosen to create a new work order for the sewer structure asset number 113490.



5. The work order dialog shows the fields required to create a work order. The sewer pipe defaults to the Sewer Pipe category, and we can fill in the required fields for Supervisor and Source of Call.

A screenshot of a dialog box titled 'Required Fields for Work Order'. It contains a table with the following data:

WorkOrder#	Asset(s)	Category (Required)	Supervisor (Required)	Source of Call (Required)
1	Sanitary Pipe Inventory: 1076	Sewer Pipe	RICK HONAS	Other

At the bottom of the dialog, there are four buttons: 'Submit and View in Lucy', 'Submit and View in Lucy Web', 'Submit Only', and 'Cancel'. There is also a checkbox labeled 'Export the current map display and attach it to the work order(s)'.

Notes: _____

- Select the required field values using the dialog box and/or picklists.

The image shows two overlapping windows. The 'Supervisor Items' dialog box on the left has a list of names: Andrea Fowles, DALE VERDON, Don Pinkston, George Butler, MARIO VINCE, Nicole Schmidt, and RICK HONAS. The 'Source of Call (Required)' picklist on the right shows a dropdown menu with 'Other' selected, and a list of options: Citizen Phone In, Citizen portal submittal, Request email (public), Request email (internal), and Other.

- After meeting all of the Work Order requirements, select one of the three available submit buttons.

The image shows a toolbar with five buttons: 'Submit and View in Lucy', 'Submit and View in Lucy Web', 'Submit Only', 'Cancel', and 'Export the current map display and attach it to the work order(s)'. The first three buttons are highlighted with red rectangles.


Note: You can also choose to export the current map extent as a pdf that will attach to the new work order.

- The new work order will contain the category and asset you selected.
 - As you can see below, Sewer Pipe category, Supervisor, and Source of Call have all been filled in, and the selected asset was automatically linked to the work order.


The image shows the 'Work Order(s) Created from ArcMap' interface. It features a toolbar with various icons and a 'Work Orders' dropdown menu. Below the toolbar is a table with columns: Work Order #, Status Text, Status Date, Category Text, Problem Text, Main Task Text, Supervisor Text, Source of Call Text, and Lead Worker Text. The first row shows a new work order with the following details: 2014-00406, New Work Order, 8/19/2014, Sewer Pipe, RICK HONAS, and Other. Below the table is a section for 'Assets' with a dropdown menu and a table with columns: Sequence, Category Text, System ID 1, Completion Date, Desc 1, Desc 2, Odometer, Hourmeter, Other Meter, and PM. The first row shows an asset with the following details: 1, Sewer Pipe, 16534, 117030 - 1078 S WANDA DR, 117031 - 1068 S WANDA DR.

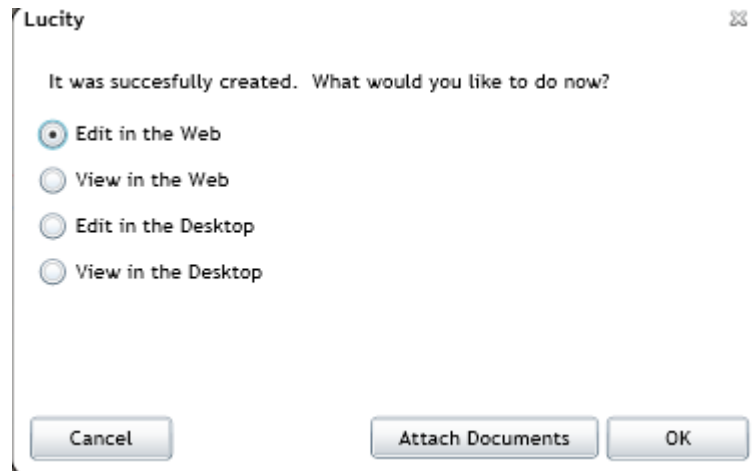
Notes: _____


Create a Work Order from the GIS Web map


1. Open the GIS Web map.
2. You can select an individual asset using the identify  button on the GIS Web map toolbar.




3. From the identify window, select Create Work Order . This immediately creates a work order including the selected asset, and gives you options for viewing or editing.



4. You can also use the Attach to Work Order button to identify another asset and attach to the work order you just created. The work order number will fill in automatically  . You can also use this button to attach to any previously created work order by changing the number.

5. You can also use the select tool  to highlight multiple assets. This opens up a grid, where you can select one, some, or all of your selected assets. Here you have the same Create and Add to Work Order options.


Sign Inventory		Water Valves		Water Nodes		Water Services			
Water Mains		Sanitary Structure Inventory		Sanitary Sewer Services		Sanitary Pipe Inventory			
OBJECTID	US Structure	DS Structure	Line Type	Flow Type	Dia/Height (in)	Material	Length (ft)	US Invert	DS Inv
264	116914	117031	Gravity Line	Sanitary	8	VCP	409.1	Null	Null
342	117029	117030	Gravity Line	Sanitary	8	Tile	200.4	Null	Null
343	117030	117031	Gravity Line	Sanitary	8	Tile	68.9	Null	Null
344	117031	117032	Gravity Line	Sanitary	8	Tile	101.3	Null	Null

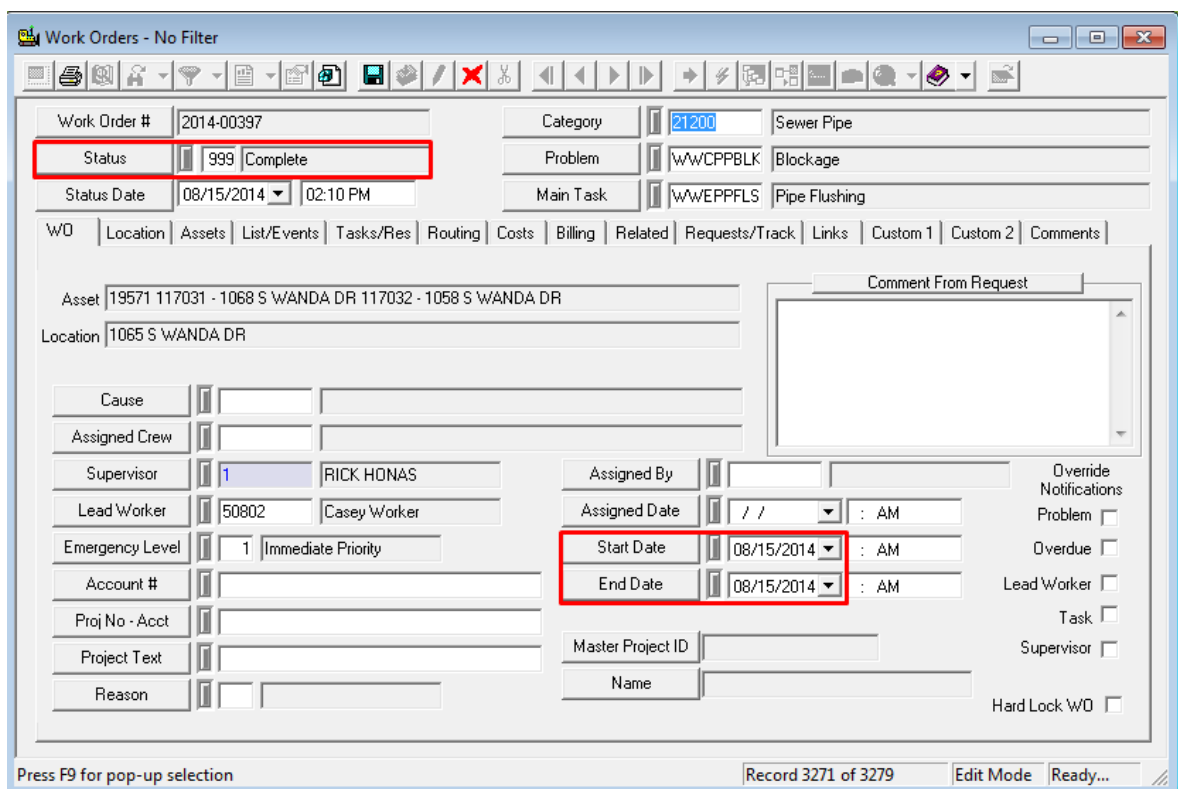
6. Finally, if you aren't sure what assets need to be included, you can always use the map to drop a pin  to give it a location. Then, you can come back and add assets around the location at a later date.

Completing the Work Order

Now that you've created the work order, selected a category, problem, and main task, entered a work location, assets, tasks, and resources, you're ready to complete your work and close the work order.

Completing the Work Order in the Desktop

1. First, double check all of the information in the work order (especially the resource information) and then return to the first tab, WO.
2. Check the information on this tab. The Start and End Dates are important.
3. Finally, change the Work Order **Status** in the header to Complete (code 999) and Save  the record. That's it! This completes the Work Order.



Work Orders - No Filter

Work Order # 2014-00397

Status 999 Complete

Status Date 08/15/2014 02:10 PM

Category 21200 Sewer Pipe

Problem WWCPPBLK Blockage

Main Task WVEPPFLS Pipe Flushing

WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments

Asset 19571 117031 - 1068 S WANDA DR 117032 - 1058 S WANDA DR

Location 1065 S WANDA DR

Cause

Assigned Crew

Supervisor 1 RICK HONAS

Lead Worker 50802 Casey Worker

Emergency Level 1 Immediate Priority

Account #

Proj No - Acct

Project Text

Reason

Assigned By

Assigned Date / / : AM

Start Date 08/15/2014 : AM

End Date 08/15/2014 : AM

Master Project ID

Name

Comment From Request

Override Notifications

Problem ☐

Overdue ☐

Lead Worker ☐

Task ☐

Supervisor ☐

Hard Lock WO ☐

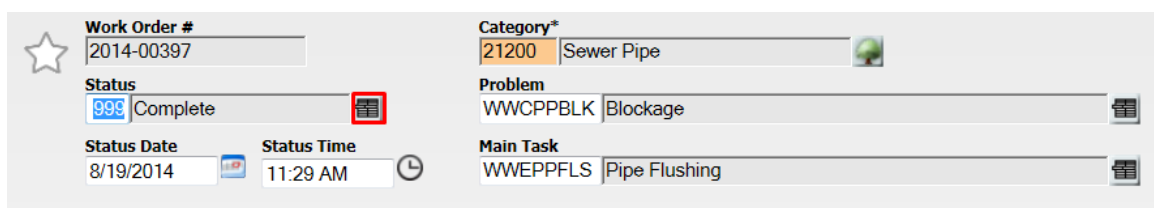
Press F9 for pop-up selection

Record 3271 of 3279

Edit Mode Ready...

Completing the Work Order in the Web

4. In the web, you can change the status in a couple of ways. One is to open up the work order form and select the 999 - Complete code from the picklist.



Work Order # 2014-00397

Status 999 Complete

Status Date 8/19/2014

Status Time 11:29 AM

Category* 21200 Sewer Pipe

Problem WWCPPBLK Blockage

Main Task WVEPPFLS Pipe Flushing

5. You can also use the Work Order toolkit to change the status to Complete, Cancelled, or select another status for either the selected records or for a whole filterset at once.




Work Requests

This module lets you log customer requests. Requests store contact data about the requester as well as information about the problem being reported. Since these requests are designed to be carried over to work orders, much of the data you enter into this module is similar to that entered into *Work Orders*.

Creating a Work Request

Creating a Work Request in the Desktop

1. Open the *Work Request* module by selecting **Work>>Requests** from the desktop application main menu.
2. There are three critical tabs you'll use to enter information:
 - **Customer** - Used to record information about the caller.
 - **Request** - Used to record details about the complaint or problem.
 - **Scripts** - Used to record what should be said during a call.
3. Click the Add button  on the toolbar to enter *Add Mode*.

Notes: _____

4. The information at top in the **Header** is automatically populated when you save the record.

5. On the **Customer** tab, enter information about the caller:

- Add the phone number.
 - When your cursor is in the Phone # field, the **Status Bar** at the bottom of the screen will contain shortcut information. Press F4 to copy the customer information from the last Request entered, press F8 to search for customers with the same phone number, or press F7 to look up previously recorded Requests with the same phone number. If you find a matching customer using any of these shortcuts, the name, address, and contact information will be automatically entered by the system.
- Add the Customer's Name.
 - Note the shortcut; you can search for address by Name (F8).
- Add the Customer's address.
 - Note the shortcuts; you can search for customer by address (F8). The F9 shortcut will pop-up the street name list. This F9 shortcut is used throughout the desktop application.

Notes: _____

- At bottom is a comments box. Enter any comments about the caller here. We'll enter comments about the issue being called about on a later tab.

Work Requests - No Filter

Request # [] Status [1] New Request Status Date [/ /] : AM

Customer Request Scripts Department/Utility Locates W/O Custom Notification Requesters Tracking Custom Comments

Phone # [] Do Not Disclose [] Send to W/O Billing [] Util Acct # [03499802]

Salutation [] M.I. [] Name [Francis] [Beals] Name Suffix []

Name Type [] Business []

Req Address [1088] S WANDA DR Apartment/Suite []

Req Address 2 []

Req City [Your Town] Req State [KS] Req Zip Code [85296]

Req Country [] Parcel Number []

Sub Division [] Email []

Home Phone # [682-0107] Work Phone # []

Phone 1 [] Phone 2 []

Very upset caller

F7 - search for Requests. F8 - search for Addresses. Record 0 of 0 Add Mode Ready...

- In our example above, we've begun to enter a request from Francis Beals. Using her last name and the F8 shortcut, we searched for matching address and contact information. This allowed us to easily enter details about the caller.
6. Now, open the **Request** tab. We'll use this tab to enter information about the reason for the call.
- Click the **Category** button and a list of categories will appear.
 - Click the plus [+] sign beside a folder to open a category group; then select the appropriate category for the caller's concern.

Work Requests - No Filter

Request # [] Status [1] New Request Status Date [08/15/2014] : AM

Customer Request Scripts Department/Utility Locates W/O Custom Notification Requesters Tracking Custom Comments

Category

21200 Sewer Pipe

Categories



- Admin
- Call Center
- Environmental
- Equipment
- Facilities
- Fleet Maintenance
- Public Works Department
- Sewer Department
 - Sewer Collection
 - Sewer Manhole
 - Sewer Pipe
 - Sewer Service
 - Sewer Misc
 - Sewer Pump Stations
 - Wastewater Treatment
 - Solid Waste
 - Admin

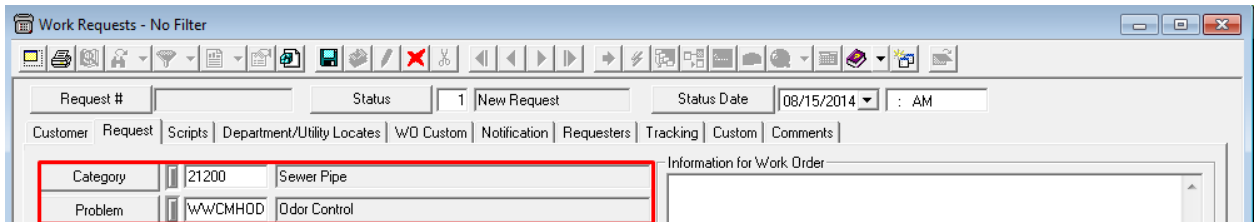
OK Cancel Caption

Problem [] Cause [] Assigned Crew [] Emergency Level [] Loc Address [] Loc Street2 [] General Location [] Loc City [] Loc State [] Loc Zip Code [] Supervisor [] Affected Asset [] Desc 1 [] Desc 2 []

Loc X Coord. [] Loc Y Coord. [] TB Year [] TB Coordinates [] TB Page []

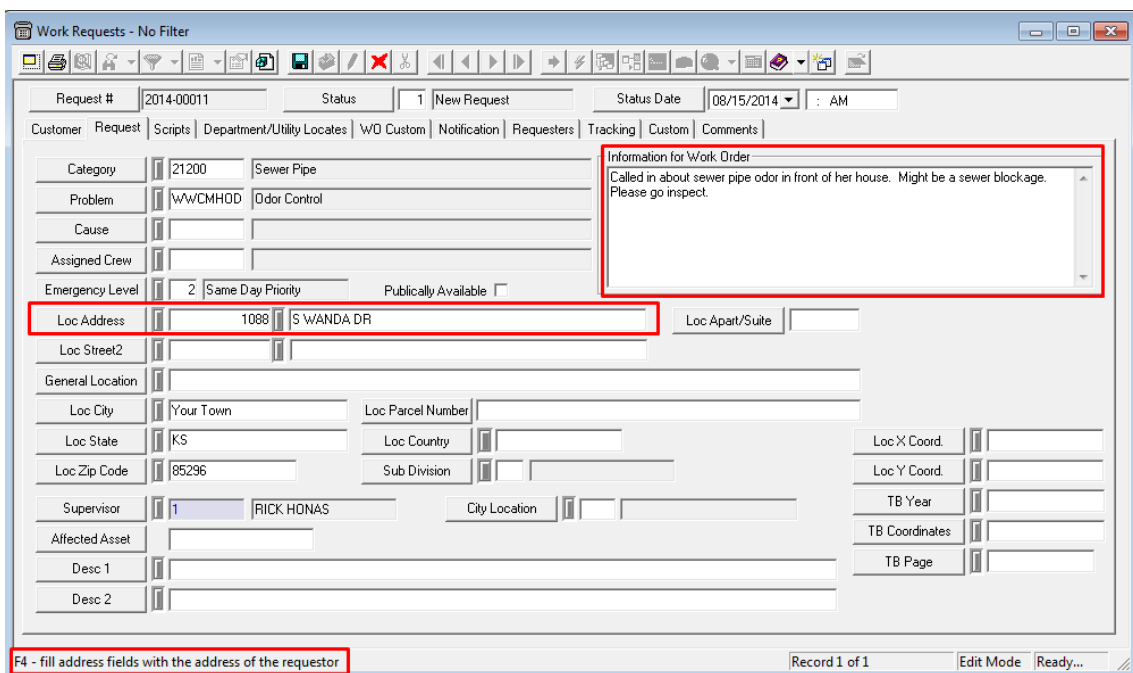
Record 0 of 0 Add Mode Ready...

- In the example above, our customer, Francis Beals has called in to report sewer odor. Thus, we've selected the Sewer Pipe category.
- **Tip:** Remember to select a category with an icon  instead of a folder . This will allow you to associate individual assets with your request and work order.
- Next, select a Problem and Cause (if known) in the same manner you chose a Category.



- In our example, we've chosen STRDPH - Pothole Repair as the problem being reported.
7. Enter the address of the issue being called about (not always the caller's address).

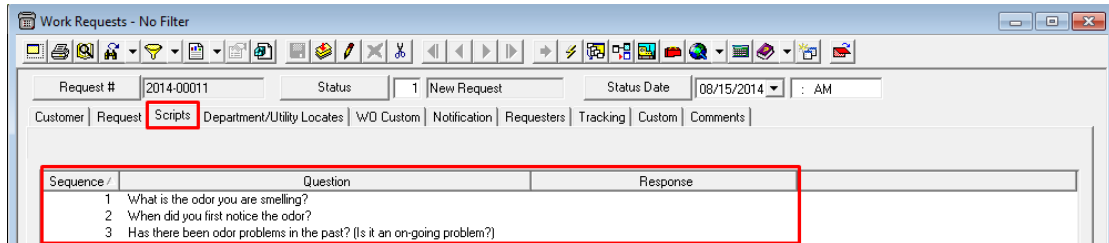
- Note the shortcut; if the Request address is the same as the caller's address on the previous tab, you can press F4 to carry it forward.





F4 - fill address fields with the address of the requestor

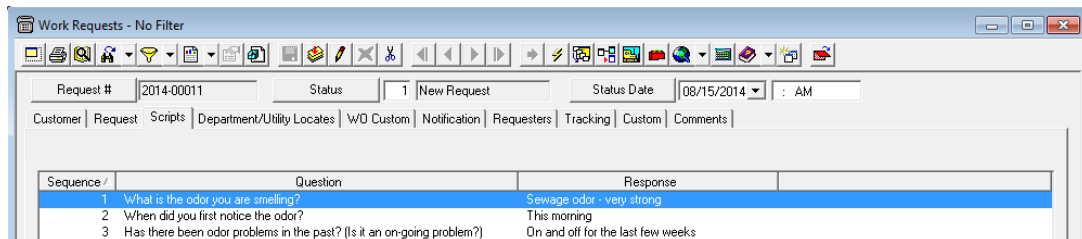
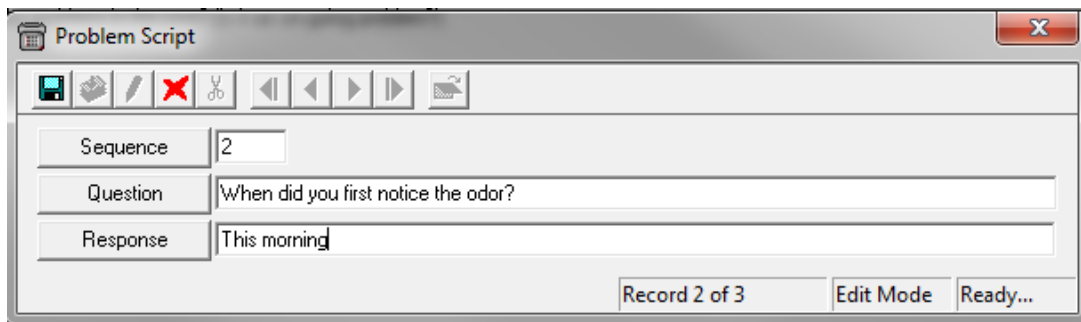
- In our example, Francis Beals has called in to report a sewage odor in front of her home residence. Thus, we have used the F4 function to carry her address forward to this tab.
 - To enter additional comments to be carried over to the work order, simply place your cursor in the bottom grid and begin typing.
8. On this tab, we also have the option to choose the Affected Asset (if known). If you already know what the asset ID is, you can select it from a list. You can also use your GIS system to identify the pipe directly in front of this address.


9. Now, open the **Scripts** tab. You'll see two grids. The top grid contains problem scripts and allows you to enter responses. The bottom grid allows you to enter additional comments that will be carried over to the work order.
 - Scripts are associated with the problem in the *Work Flow Setup, Problems* module. When you select a problem in the Request tab, any scripts associated with that problem will be carried over automatically.



10. To enter a response to a script, complete the following steps:

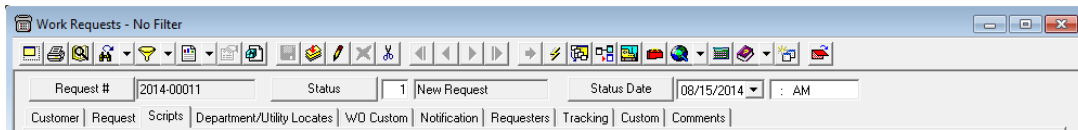
- Double click on a question in the grid. The Problem Script dialog will appear.
- Click the Edit button  and type the caller's response in the field provided.
- Save  the record and the response will be added to the grid.



- In our example, we have recorded responses to the problem scripts. Within the last few weeks is when the sewage odor started. The current odor problem began this morning.
11. The Request is now complete. Once again, we have a required field to be filled in on the custom tab. Fill in a value before saving, check the rest of the data and the press the save button  in the toolbar.


12. The **Request Number**, **Status**, and **Status Date** will be populated automatically in the header.

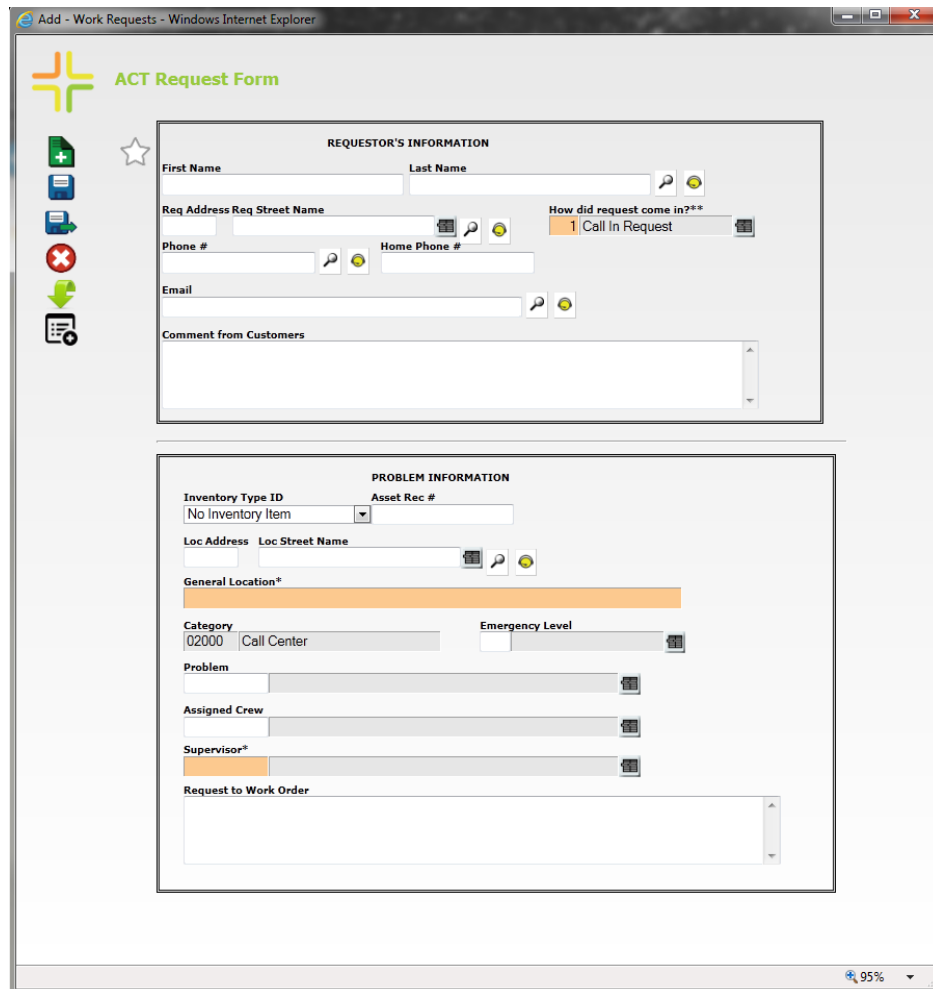
- As you can see in the example below, the status has been set to “1 - New Request”.



The screenshot shows a desktop application window titled "Work Requests - No Filter". The header area contains the following fields: Request # (2014-00011), Status (1 New Request), and Status Date (08/15/2014 : AM). Below the header is a navigation bar with tabs: Customer, Request, Scripts, Department/Utility Locates, WO Custom, Notification, Requesters, Tracking, Custom, and Comments.

Creating a Work Request in the Web

1. Let's do another example, this time using the web. Open the *Work Request* module by opening a Request view or selecting **Modules>>Work>>Work Requests** from the dashboard.
2. Similar to the Work Orders, we can see that the views and grids displayed are customized for our organization.
3. Click **Add a Record** button  on the toolbar to open up your default request form.
4. Here we can see all of the fields that we filled out in the desktop application are condensed into a single form.



The screenshot shows a web application window titled "Add - Work Requests - Windows Internet Explorer". The form is titled "ACT Request Form" and is divided into two main sections: "REQUESTOR'S INFORMATION" and "PROBLEM INFORMATION".

REQUESTOR'S INFORMATION


- First Name: [Text Field]
- Last Name: [Text Field]
- Req Address: [Text Field]
- Req Street Name: [Text Field]
- How did request come in?*: 1 Call In Request
- Phone #: [Text Field]
- Home Phone #: [Text Field]
- Email: [Text Field]
- Comment from Customers: [Text Area]

PROBLEM INFORMATION

- Inventory Type ID: No Inventory Item
- Asset Rec #: [Text Field]
- Loc Address: [Text Field]
- Loc Street Name: [Text Field]
- General Location*: [Text Field]
- Category: 02000 Call Center
- Emergency Level: [Text Field]
- Problem: [Text Field]
- Assigned Crew: [Text Field]
- Supervisor*: [Text Field]
- Request to Work Order: [Text Field]


- First, we will enter in the Requestor's Information in the first section. The caller gives his address as 1098 S Wanda Dr. Type this into the Requestor's address field.

The screenshot shows a form titled 'Requestor's Information'. The 'Req Address' field contains '1098' and the 'Req Street Name' field contains 'Wanda'. Below these, the 'Phone #' field is empty and the 'Home Phone #' field contains 'S WANDA DR'. There are search icons (magnifying glass and a yellow circle) next to the address fields.

Note: This field will autocomplete based on partial searches (i.e., just typing “Wanda”) seen above, or you can open the picklist  to filter and select from the entire street list, seen below.

The screenshot shows a picklist window with a table of streets. The table has columns: Direction, Prefix, Street, Type, and Suffix. The 'Street' column is filtered to show streets starting with 'W'. The row 'S WANDA DR' is highlighted in blue. The 'Filter' button is highlighted in red.

Direction	Prefix	Street	Type	Suffix
S		WADE	DR	
S		WADE	CT	
N		WADE	DR	
W		WAGNER	DR	
W		WAGNER	CT	
E		WAGON	CT	
E		WAGON	CIR	S
E		WAGON	CIR	N
E		WAITE	LN	
S		WALLRADE	LN	
E		WALNUT	CT	
E		WALNUT	RD	
S		WANDA	DR	
E		WARBLER	RD	
E		WARBLER	CT	

- We can use the same search functionality as the desktop on fields like the phone number, e-mail, name or address, or any field with a look-up button . If there is only a single matching option, it will automatically populate all known fields with the customer's information.

The screenshot shows the 'Requestor's Information' form. The 'First Name' field contains 'R' and the 'Last Name' field contains 'Mills'. The 'Req Address' field contains '1098' and the 'Req Street Name' field contains 'S WANDA DR'. The 'Phone #' field is empty and the 'Home Phone #' field contains '682-0144'. The 'How did request come in?*' dropdown menu is set to '1 Call In Request'. The 'Email' field is empty. The 'Comment from Customers' text area contains the text 'Calling in about sewage smell in front of his house.'.

Notes: _____

- Next fill in all relevant Problem Information fields. You will notice there are different required, read-only, limited picklists, and defaulted fields than in the desktop. This is because of additional settings within the specific form that we are using.

PROBLEM INFORMATION

Inventory Type ID **Asset Rec #**

Loc Address **Loc Street Name**

General Location*
Smell is coming from the sewer lines in front of the neighbor's house.

Category **Emergency Level**
 Immediate Priority

Problem

Assigned Crew

Supervisor*

Request to Work Order

- Save and close this record. Notice that some fields displayed were automatically populated even without being included in the form (Status, Status Date, Request #). Also, notice that the Requestors tab includes a link to our single requestor.

	Request #	Status Text	Status Date	Problem Text	Supervisor Text	Request Origin	Loc Address	Loc Street Direction	Loc Street Name	Loc Street
	2014-00012	New Request	8/20/2014		RICK HONAS	1	1098	S	WANDA	
	Scripts (0) Requestors (1) Tracking (2) Comments (0) Notifications (0) WOs (0) Requests (0)									

Duplicate Requests

The Requestors tab in the *Requests* module is specifically designed to handle duplicate requests. This tab allows you to log multiple customer calls regarding the same problem at one location. The request lookup function allows you to recognize duplicate requests in the system.

- Let's take another look at the request we just created. You'll notice next to several fields have a request lookup button. Let's use this button to lookup requests tied to the location address.

Loc Address **Loc Street Name**

General Location*
Smell is coming from the sewer lines in front of the neighbor's house.




Notes: _____

If there are any open requests that match a lookup field, a picklist will open displaying the matching requests.

Status Date	Status	Problem	Cause Name	Name2	Requestor's Address	Request City	Loc Ad
8/15/2014	New Request	Odor Control		Francis Beals	1088 S WANDA DR Your Town	1088 S	
8/20/2014	New Request		R	Mills	1088 S WANDA DR Your Town	1088 S	

Cancel OK

Open up this existing work order.

2. It appears that the problem being reported has already been called in to the system. You have two options.
 - a. You can keep both requests open and link the requests to each other in the Requests tab using the Attach an Existing Record  button.
 - b. You can delete  the new request, or if you haven't already saved it, cancel  out of the form. Then we can add the additional requestor to the original request record. Let's delete the record.
3. Open the original record and add the additional requestor. Each time you receive a subsequent request for the same problem at that location, you should record it directly into this Requesters grid. This allows you to create a list of requesters calling about the same problem at the same address. This data is helpful in determining how many complaints have been received regarding this problem.








2014-00011 New Request 8/15/2014 Odor Control RICK HONAS 1 1088 S WANDA

Scripts (3) Requesters (1) Tracking (1) Comments (0) Notifications (0) WOs (0) Requests (0)

Add a Record No Phone # Date Received Name Name2 Business Address Req Street Post Bldg No Req Street Prefix Type Street Direction Str

1			8/19/2014	Francis	Beals		1088				S	WA
---	--	--	-----------	---------	-------	--	------	--	--	--	---	----

This also allows you to view all the requestors in a single view. This would allow you to use the toolkit to send an e-mail notification to all selected requestors, or export a list for a mail merge or call list.


      Requestors  10

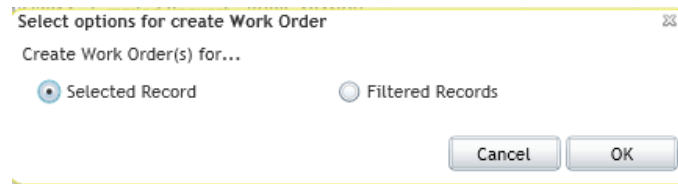
Caller No	Phone #	Date Received	Name	Name2	Business	Address	Req Street	Post Bldg No	Req Street Prefix	Type	Street Direction	Str
2		8/20/2014	R	Mills		1098					S	WA
1		8/19/2014	Francis	Beals		1088					S	WA

Notes: _____

Creating a Work Order from a Work Request

You can generate a work order directly from a request. This will allow you to carry over data to a new work order from the request you just entered.

1. Click the Create Work Order button  at the top of the *Requests* view. A prompt will appear asking if you want to create the work order on the Selected Records or Filtered Records. Click *Ok* to continue.



2. The new work order will contain all of the Request information (but not Customer information), and will have an automatically assigned Work Order number. It will include the Request to Work Order comments, the location address, the affected asset, and the link back to the request record. Notice the request record's status has been automatically updated to "Assigned to WO".

2014-00407

New Work Order

8/20/2014

Sewer Pipe

Odor Control

Odor Control Maintenance

RICK HONAS

2

Comments (0)

Locations (1)

Assets (1)

Work Order Tracking (4)

Work Orders (0)

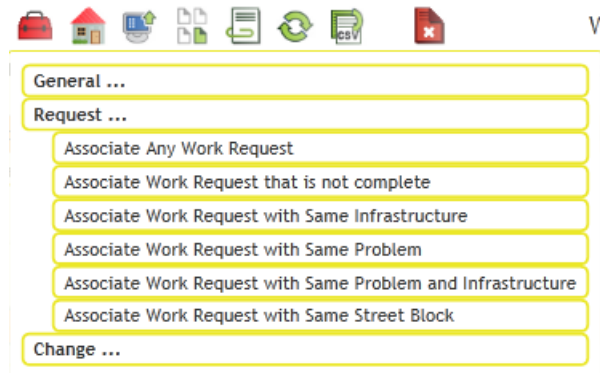
Work Requests (1)

PM/Work Templates (0)

Tasks (0)

</

3. If we have additional requests we could link them individually, or use toolkit options to associate potentially related requests to this work order.



4. This begins our work order workflow all over again. Once we have done the work, entered in resource information, and completed the work, our request record's status will automatically change from "Assigned to WO" to "WO Completed".

2014-00011	WO Completed	8/20/2014	Odor Control	RICK HONAS	Call In Request	1088	S	WANDA	
------------	---------------------	-----------	--------------	------------	-----------------	------	---	-------	--