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

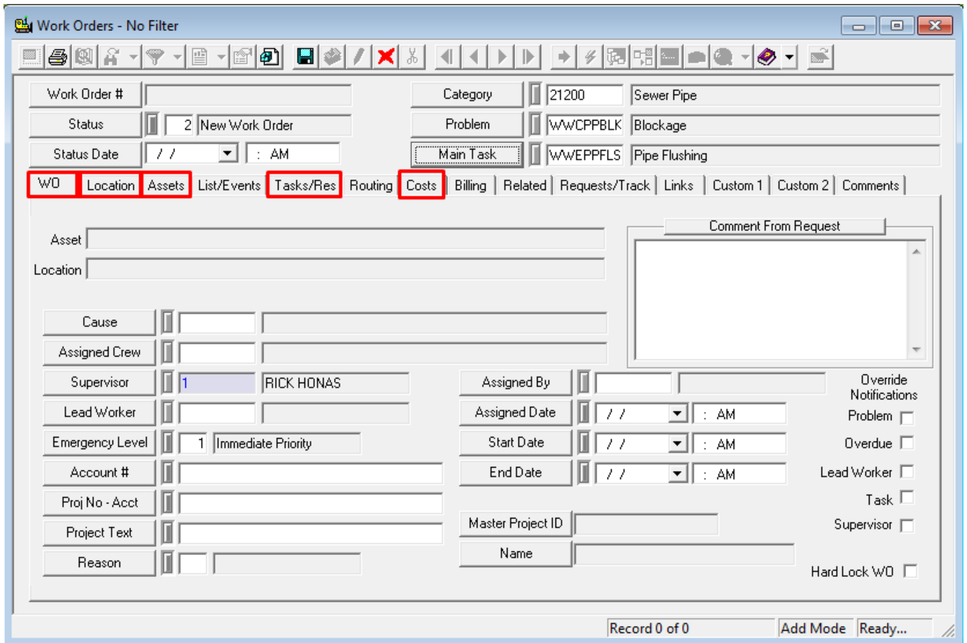
The *Work Orders* module allows you to schedule and track work tasks, personnel, equipment, and material usage. There are three versions of work orders offered in the desktop: *Standard*, *Lite*, and *Daily Work*. The Lucity Web work module interface will also display a different, customized interface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

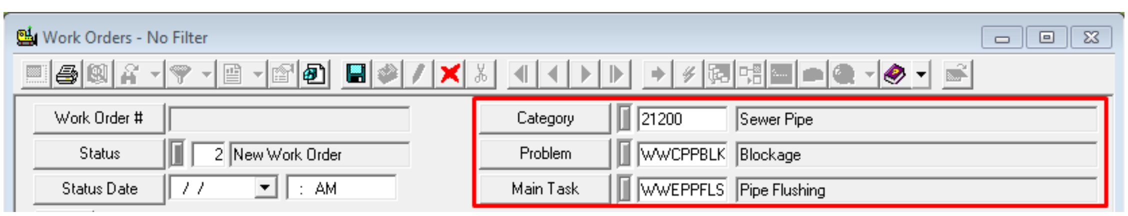
As explained above, three work order modules are available in the desktop. In this section, we'll discuss the *Standard Work Order* module, the most comprehensive of the three. To create a work order:

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.



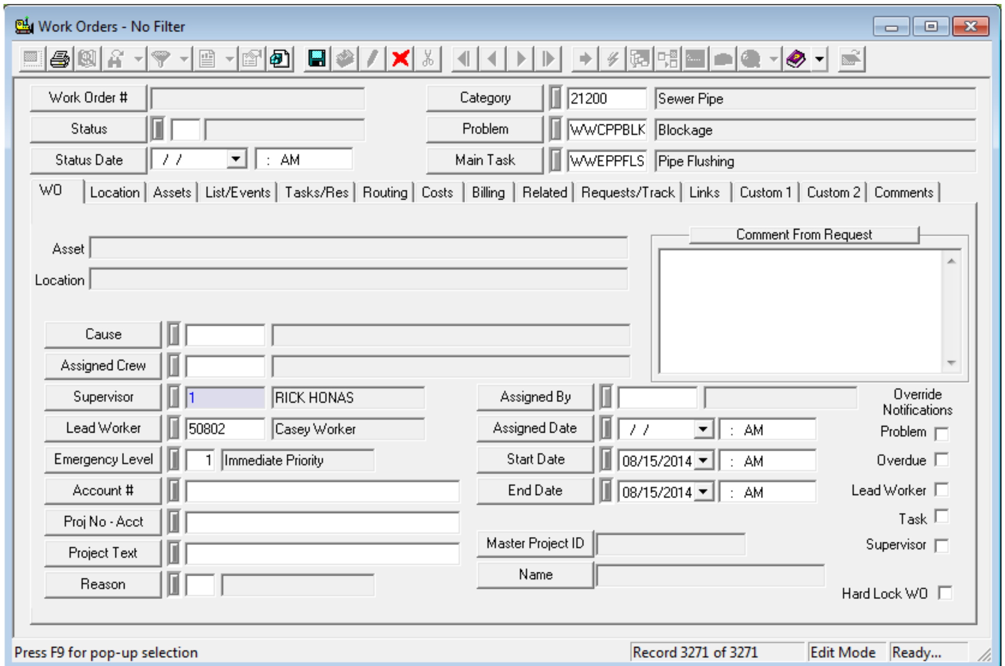

## Header Information

- 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.



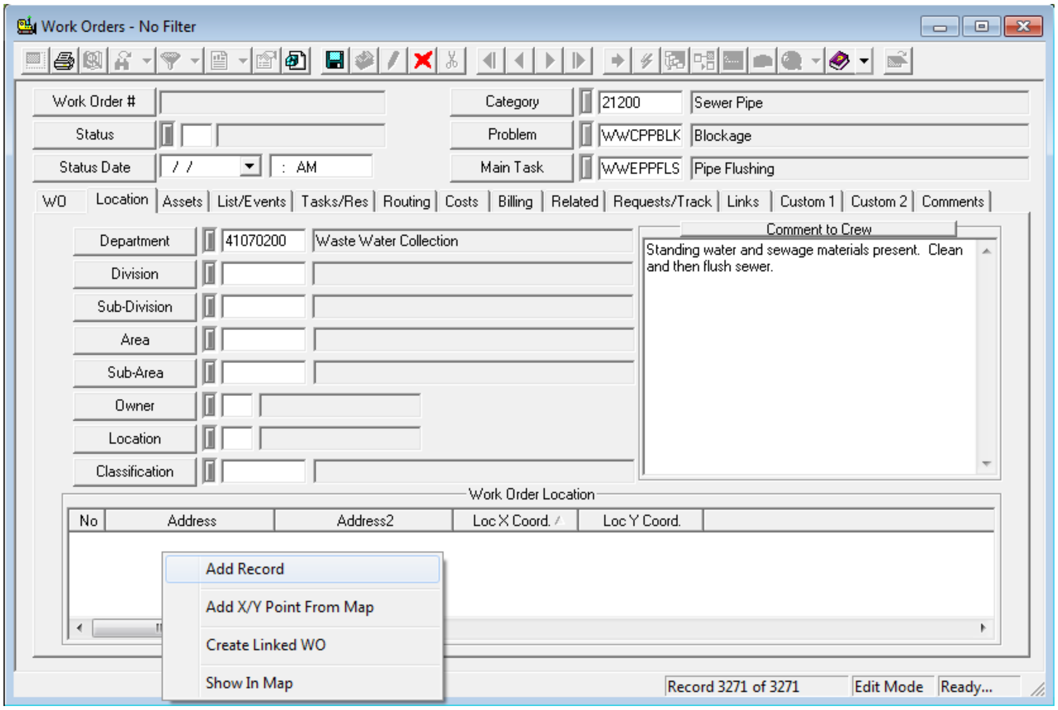

## WO Tab

- 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.

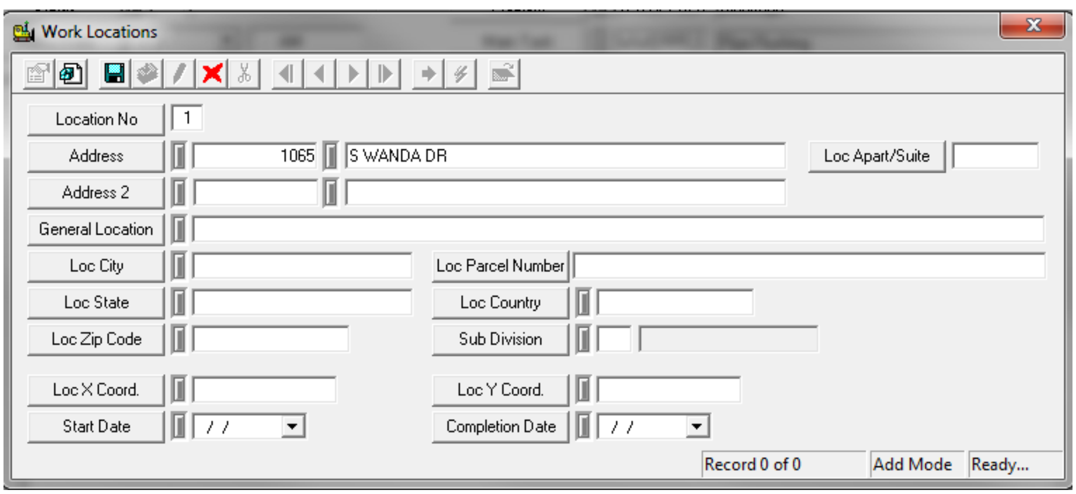



## Location OR Asset Tabs

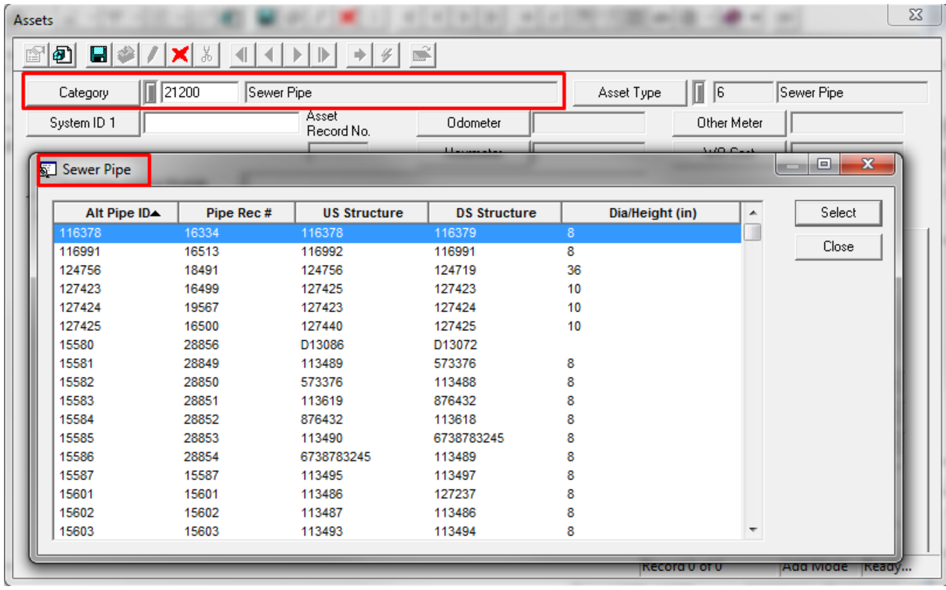
- An asset is any individual item your organization maintains.  For example, it could be a vehicle, a stretch of roadway, or a sewer manhole.  Typically you will either include an asset OR a location on a work order.  Either will indicate where the job is located, but adding an asset will also have the 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.



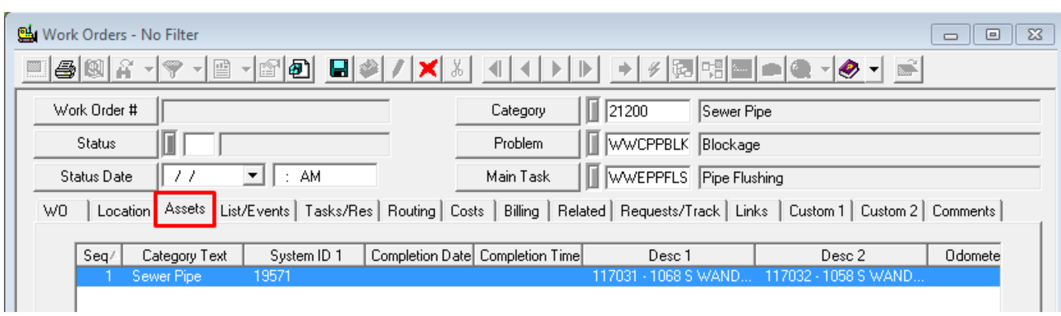

- To add a location to the grid, right click in the grid and select *Add Record*.
- A new form will open allowing you to enter one or more locations.



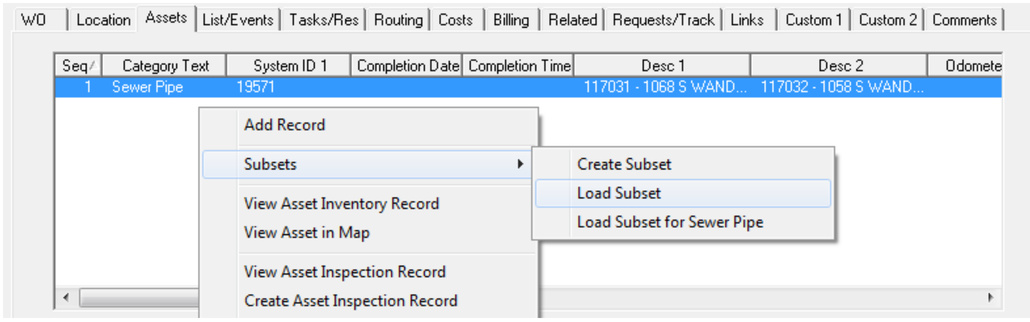

- Enter the address, general location, and any other details needed.
  - As you can see in the example above, this problem is located 1065 S. Wanda Dr.
- Save the record. You can now add another address, or Close the Work Locations form.
- Any addresses you entered will appear in the Work Order Location 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.

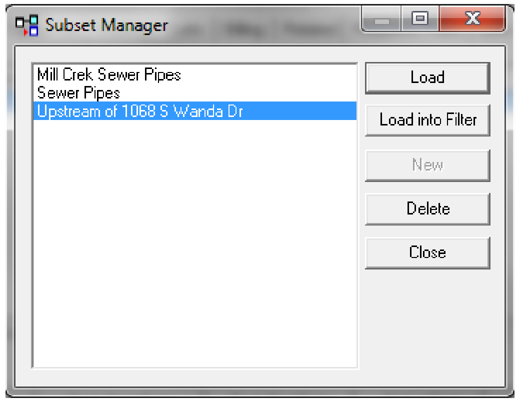



- On the Assets form, note that the Object Type (the type of asset you can add to your work order) is dictated by the **Category** chosen in the **Header**.
    - In this example, we have selected Pipe Maintenance as the category. This allows us to include sewer pipe assets in the work order.
    - You 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.

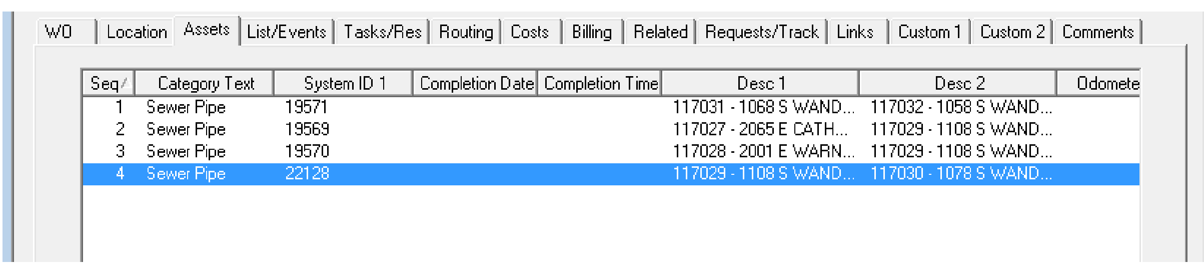



- You can also create or load **Subsets** in the **Assets** tab. Subsets are groups of filtered records from one module that can be viewed in related modules.
    - For example, you can create a subset of sewer pipes in the *Pipe Inventory* module and then load that subset into the Work Order Asset grid.
    - 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.

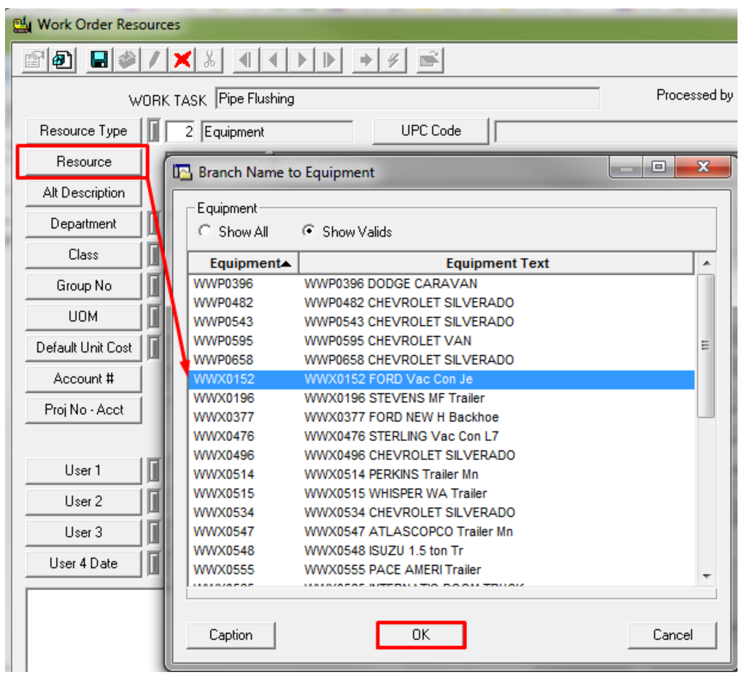



## Tasks & Resources Tab

- 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).

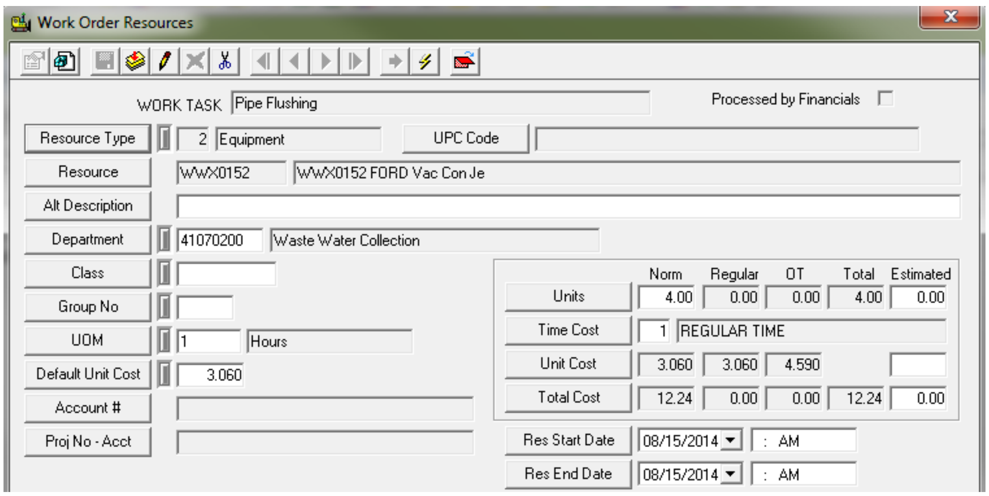
These details might also be feeding information about the job back into another integrated financial system that helps manage project costing and budgeting, or payroll.

- 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".




- 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.

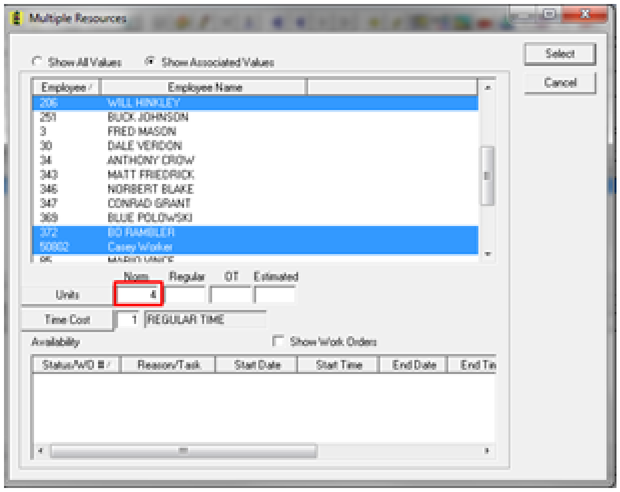
- Enter the dates the resource worked on the job. The Start Date and End Date must be the same. This means that an INDIVIDUAL RESOURCE ENTRY is required for each resource on each job for each day.
- Click Save  and Close  the Work Order Resources form. The resource you selected will now appear on the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



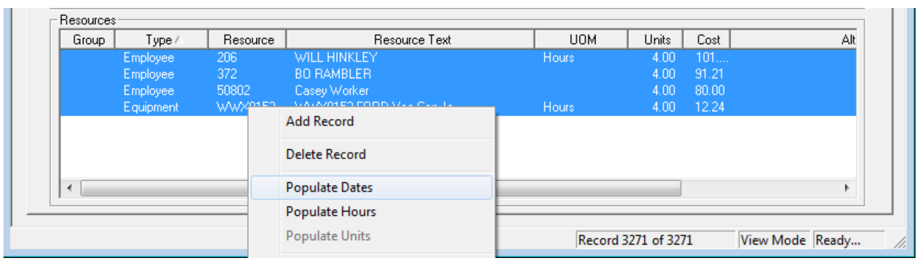

## Adding Multiple Resources to Work Orders

- 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.

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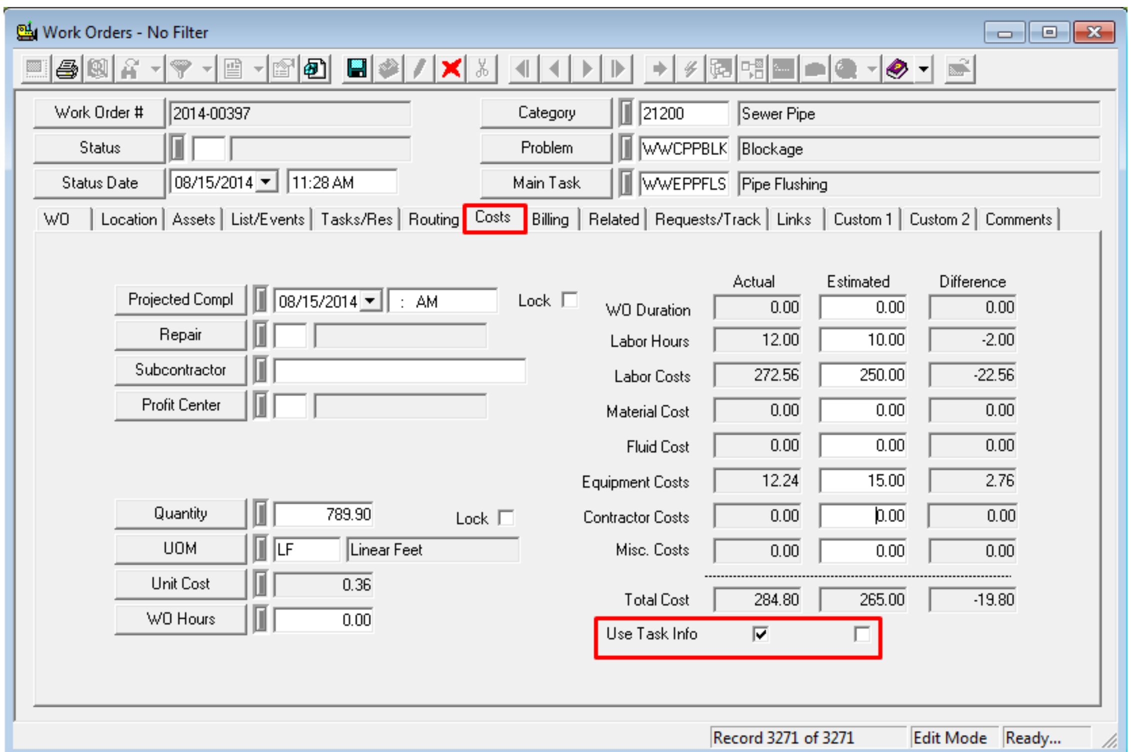
## Costs Tab

- 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.




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:

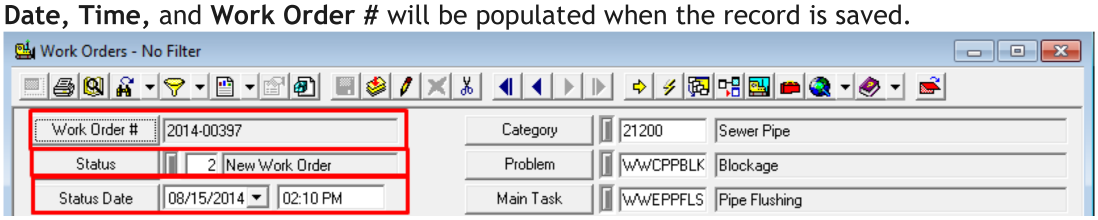
- Projected Completion Date – This is a calculated field. It represents Start Date + Estimated Duration.

- 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.

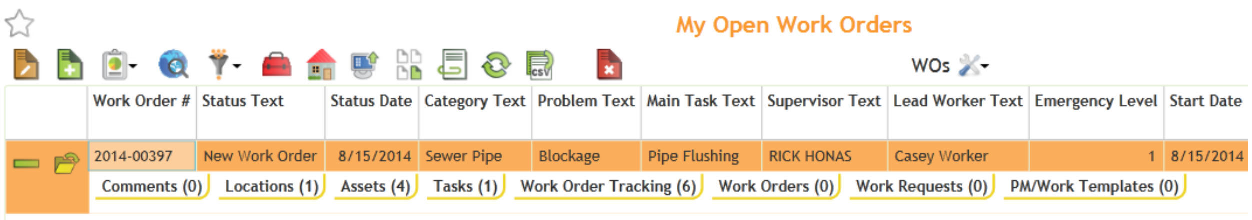

- The **Status** field will automatically be populated with 2—New Work Order. The **Status Date, Time,** and **Work Order #** will be populated when the record is saved.



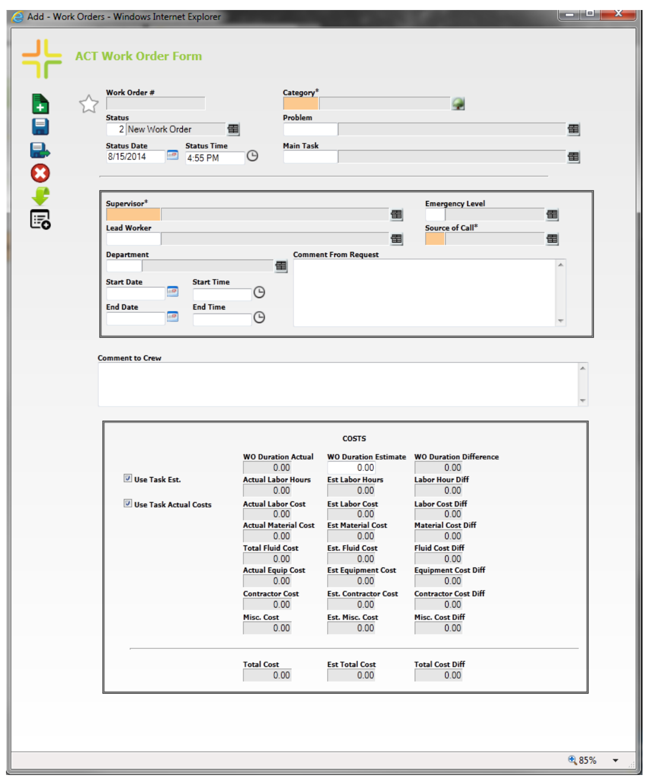
# Creating a Work Order in the Web

The Lucity Web interface allows you to create work orders through a completely customized web interface on a browser from a computer without having Lucity 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:

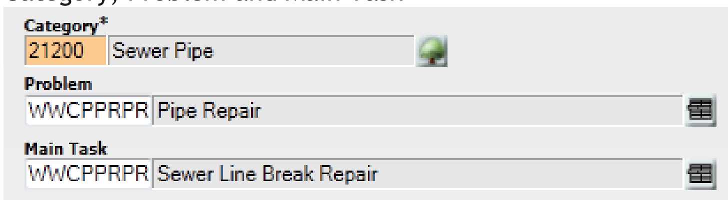



2. Click *Add a Record* button on the toolbar to open up your default work order form. Once they get out there, they see that one of the pipes needs to be replaced. Let's schedule that work for the following day.

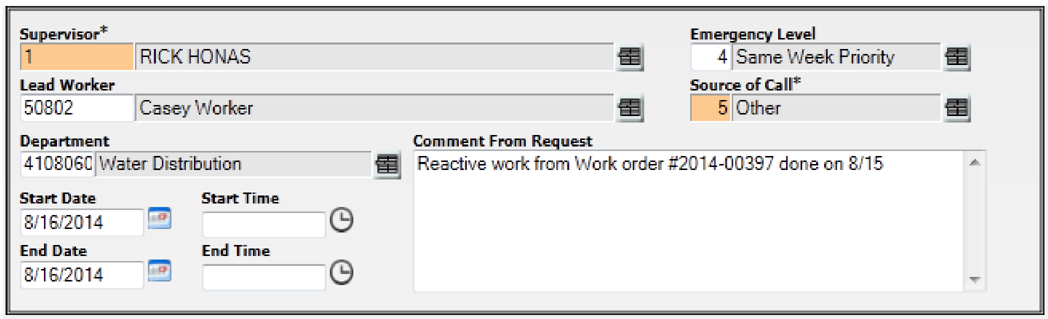


3. The Work Order form is customized to match the workflow we did on the previous work order. We can start out by filling out:

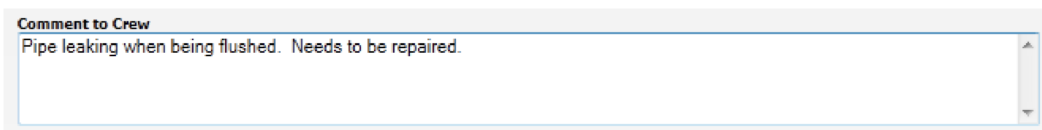
- Category, Problem and Main Task




- Supervisor, Lead Worker, Start/End Dates




- Comments

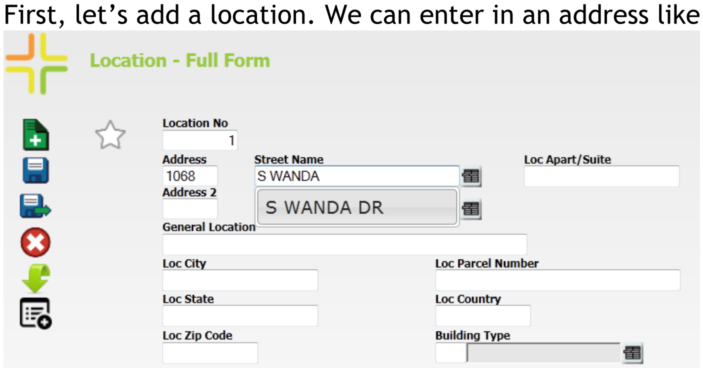



- Leave costs alone for now. This will be populated once we add our task resources. Once all necessary information is filled in, hit save or save and close .

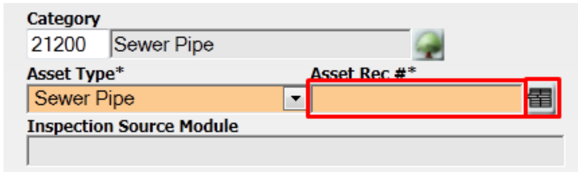
## Child Relationship Records

- 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 .

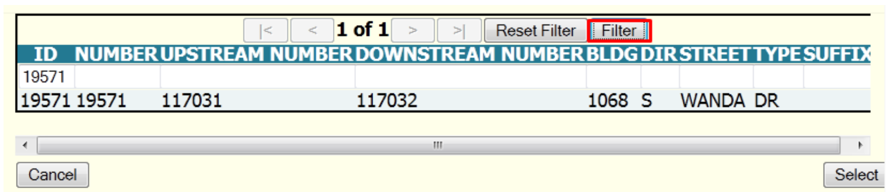

- First, let's add a location. We can enter in an address like before.



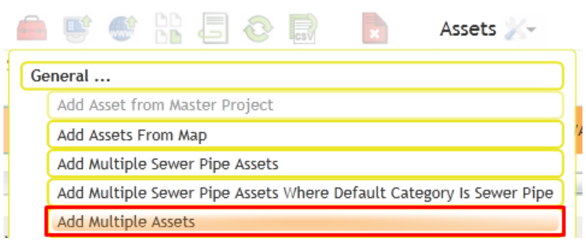
- Next, we can add an asset as we did previously.  Click add, which opens up an Asset form. From here you can select the asset type (defaulted to match your Work Order category), and then from the asset list.



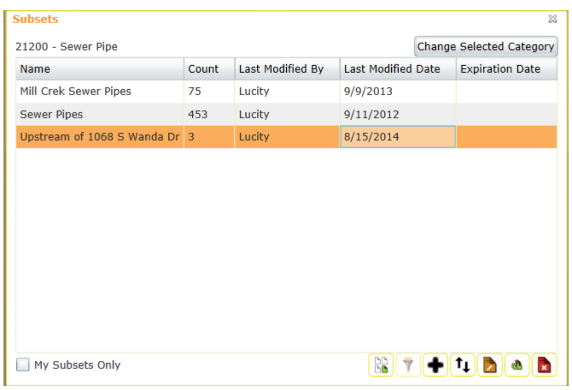

We used the filter button to find the specific pipe in the asset list.




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

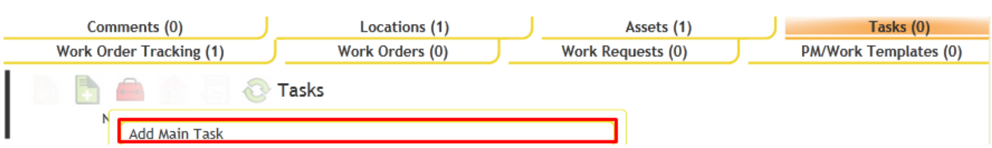



  - Or you can use the same subset tool  we used in the desktop:

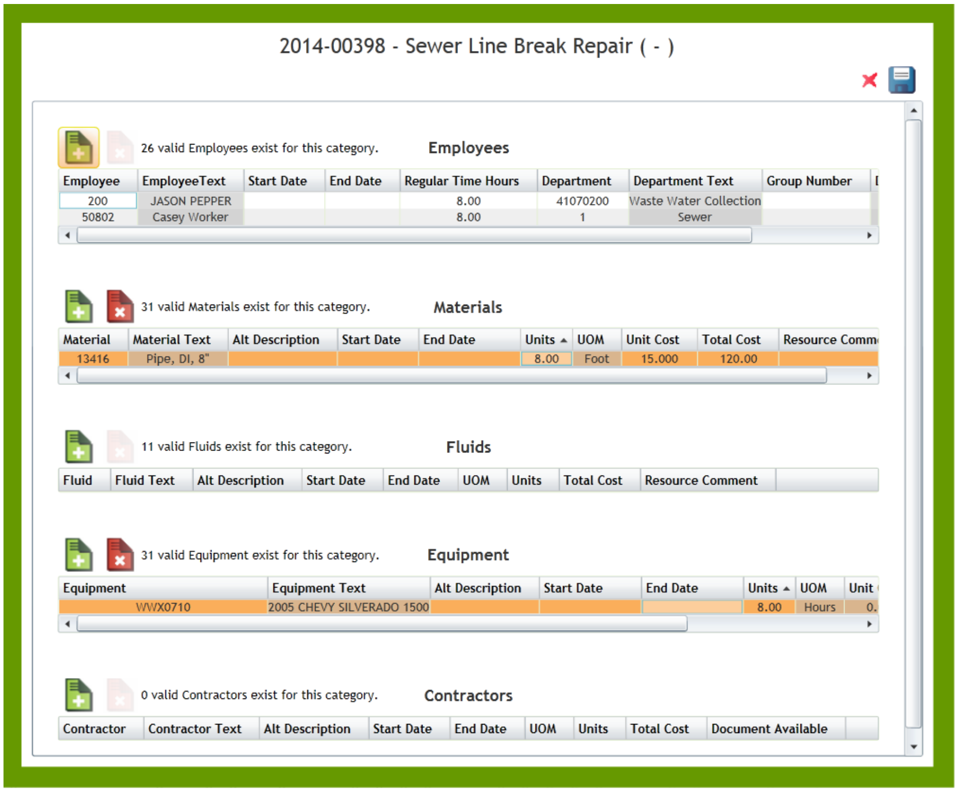



For now, we'll stick with one asset.

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

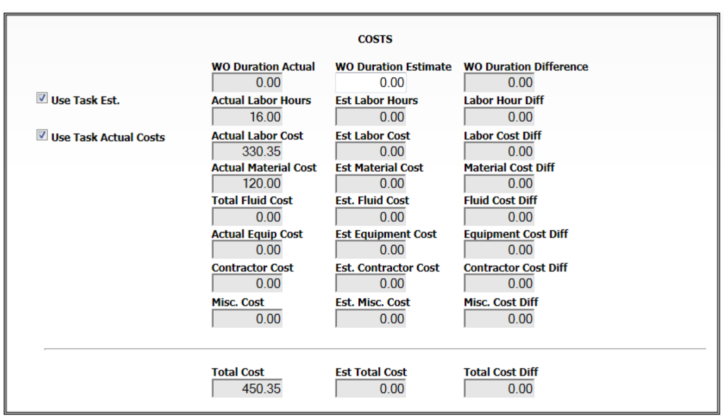


- We now have a few ways to interact with the task so that we can add in our resources. You can use the add button to select tasks individually. You can also add multiple resources using the toolkit button. We are going to use the editable grid function, so that we can view and add employees, materials,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




- 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.



# Creating a Work Order from Within another Work Order

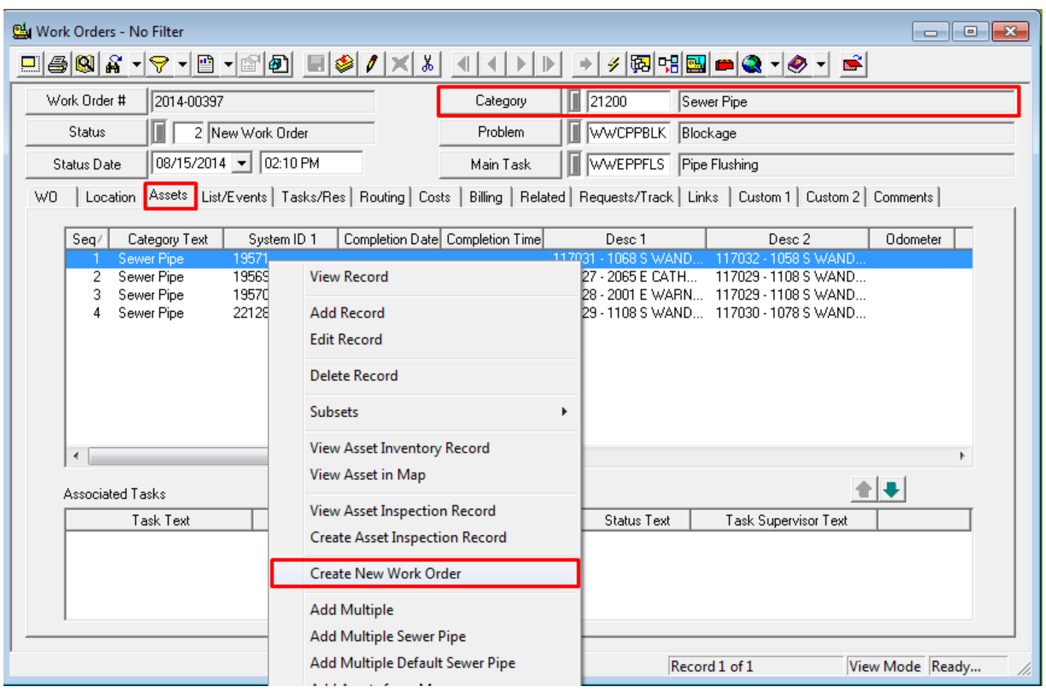
There are two ways that you can link work orders together. One way is to create a work order from within another work order or from a resulting task. The other way is to link them together after they've both been created. Let's go through the steps of linking using each of these methods in the desktop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

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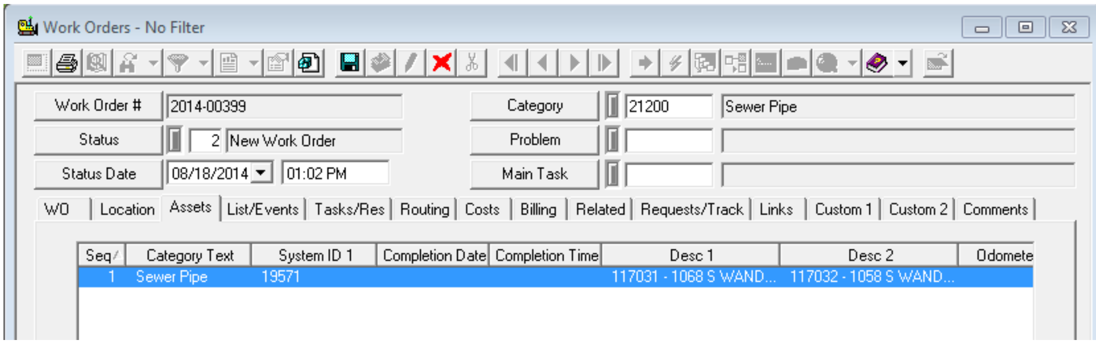
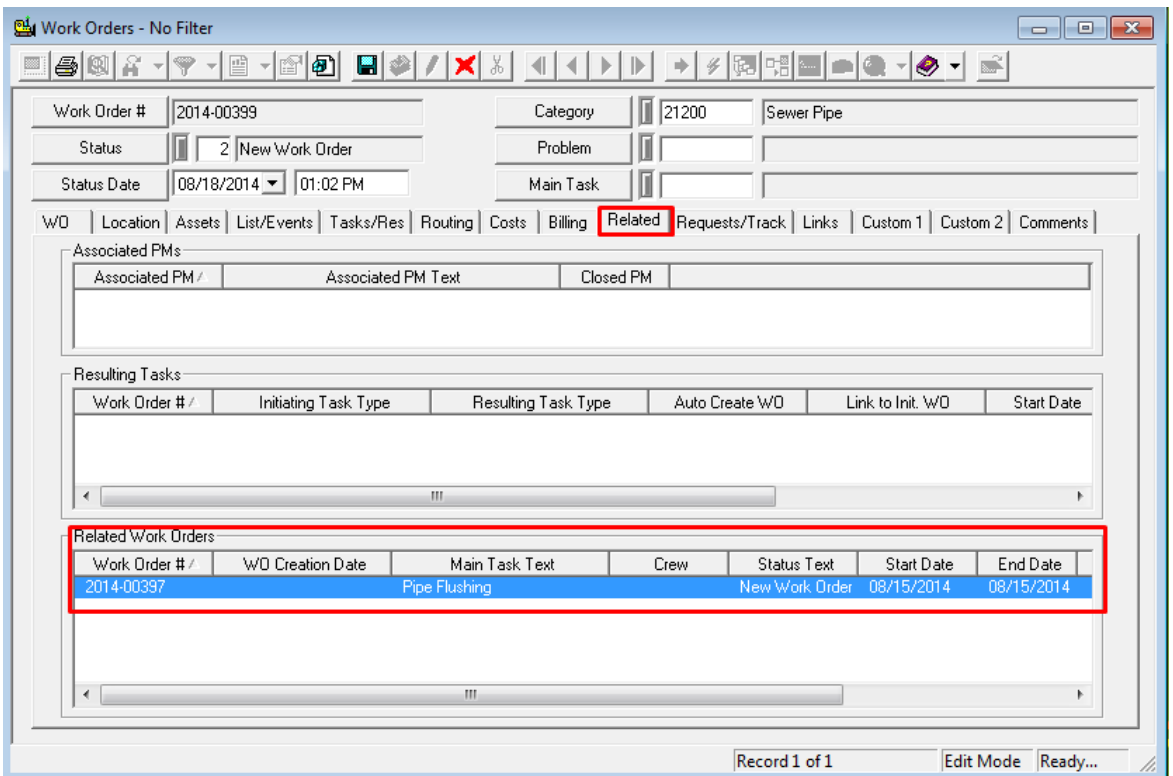
3. As you can see below, the new work order contains the same Category as the previous work order (Sewer Pipe) as well as the three assets you selected on the Assets tab.




4. 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.

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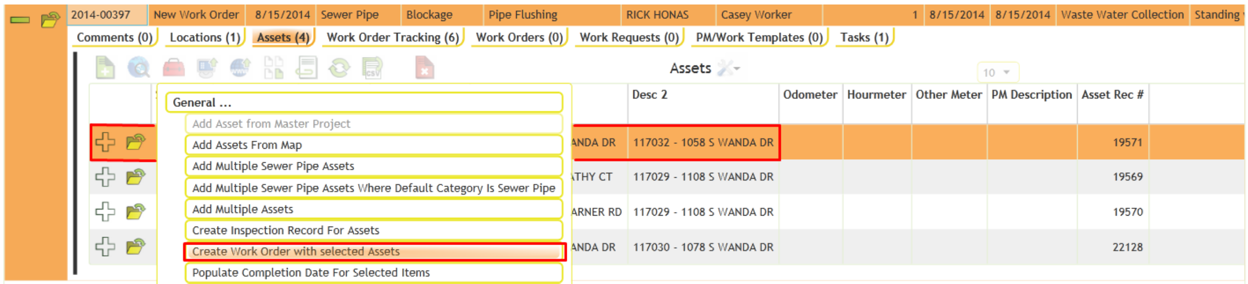
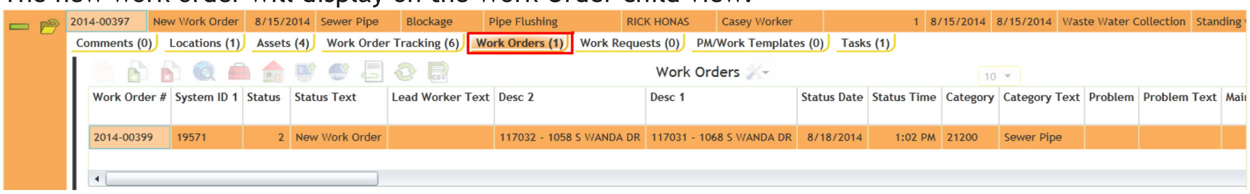
## Creating a Work Order from the Asset Grid in the Web

5. 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.

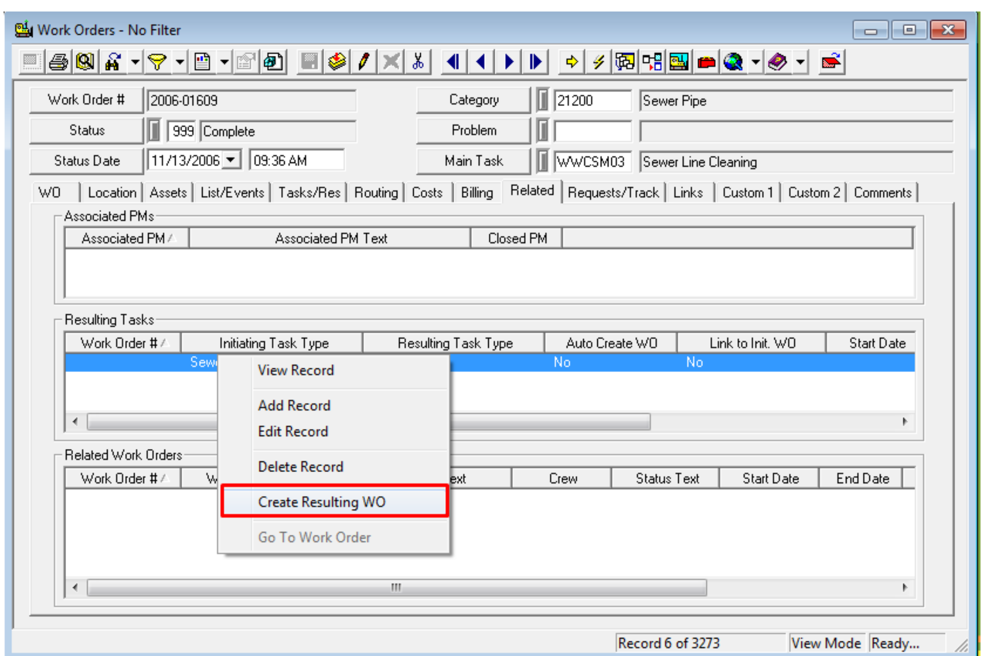



## Creating a Work Order from a Resulting Task in the Desktop

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:

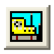
1. Select the task in the Resulting Tasks grid.
2. Right click on the task and select *Create Resulting WO*. You will again be prompted to view the new work order.

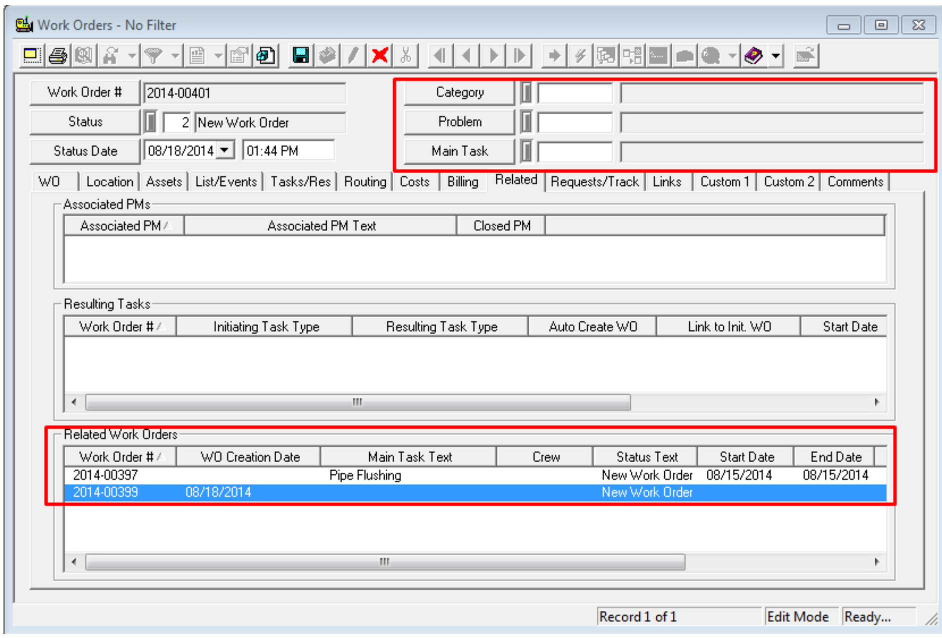



- Note that this option will be disabled if a work order already exists for the task. Only one work order can be generated per task.

## Creating a Work Order from another Work Order in the Desktop

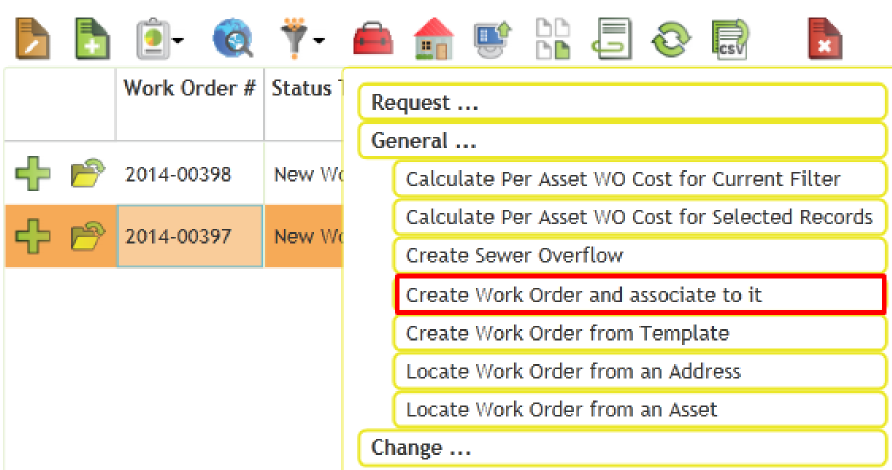
A third way in which you can create a work order from within another work order is by using the Create New Work Order button in the module toolbar. This will create a new, empty work order that is linked to the current work order in the Related Work Orders grid. This is useful when you want the current 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.




## Creating a Work Order from another Work Order in the Web

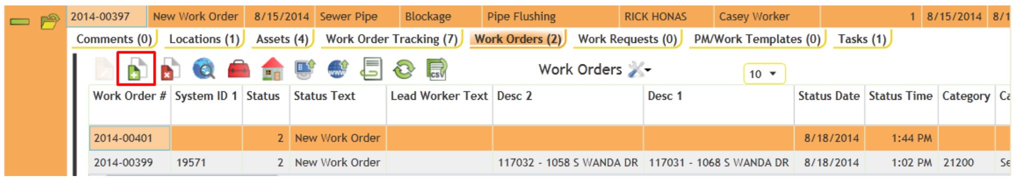
4. To do this function in the web, we will again use the toolkit function. Once you have selected the work order record, click the toolkit button and choose the option "Create Work Order and associate to it".



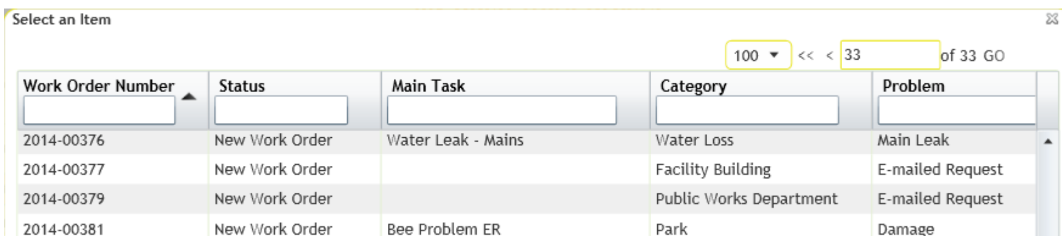
## Linking to an Existing Work Order

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.

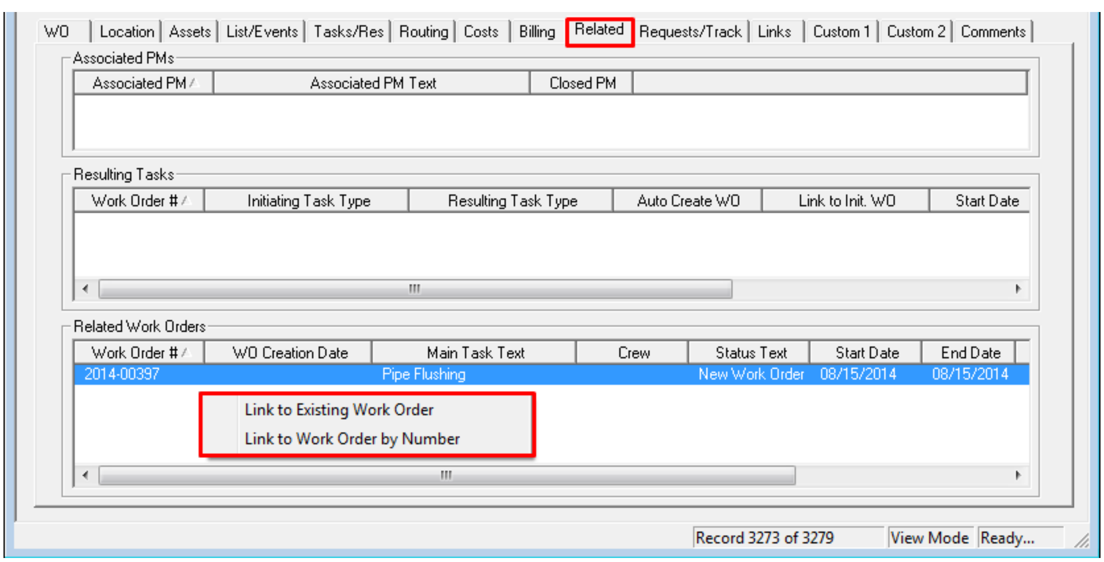



2. Filter for or search through the list for the work order you want to attach.




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).



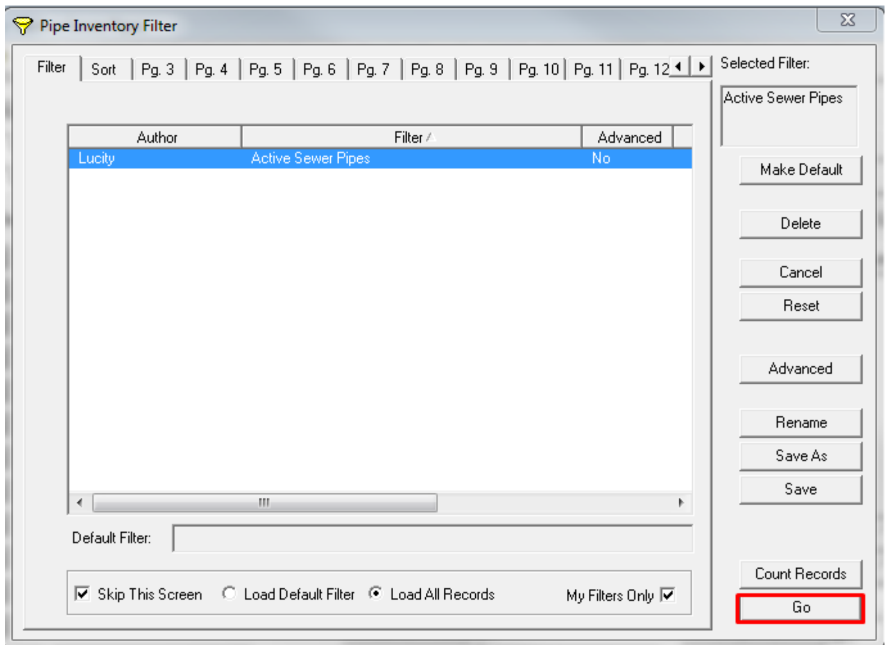

2. The work order will now be linked.

# *Creating a Work Order from an Asset Inventory Record*

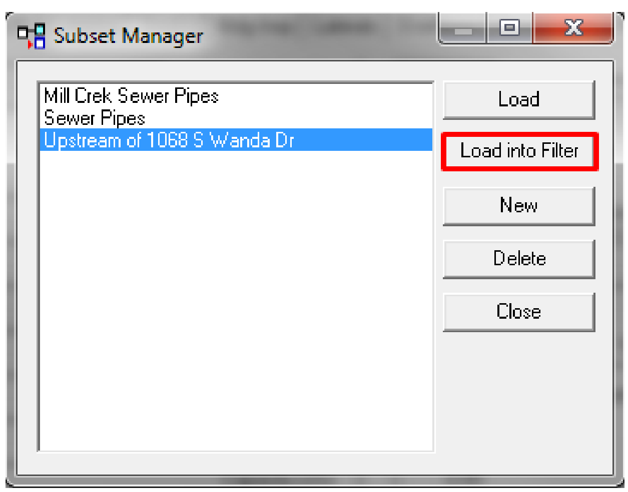
Another way to create a work order is by creating it directly from the asset that will be worked on. This will include the asset and location information in the new work order. Let’s look at an example using the upstream Sewer Pipe records that we didn’t replace.

## Creating a Work Order from the Asset in the Desktop

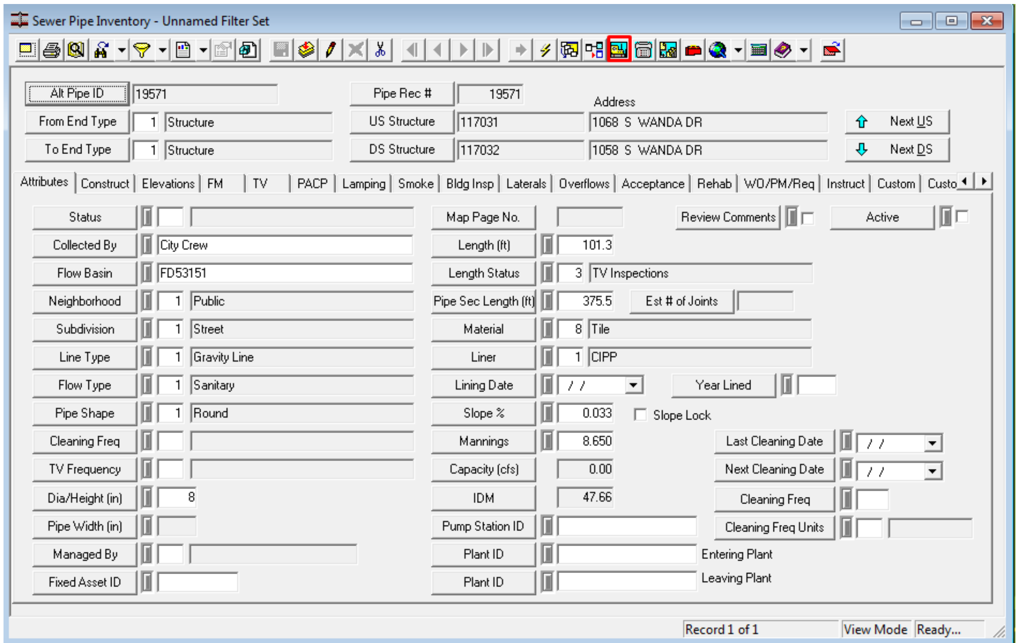
1. First, you will need to select the asset record(s) that you want to create work on. We will load a filter of all our “Active” pipes using the filter button. Select “Go”.




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.

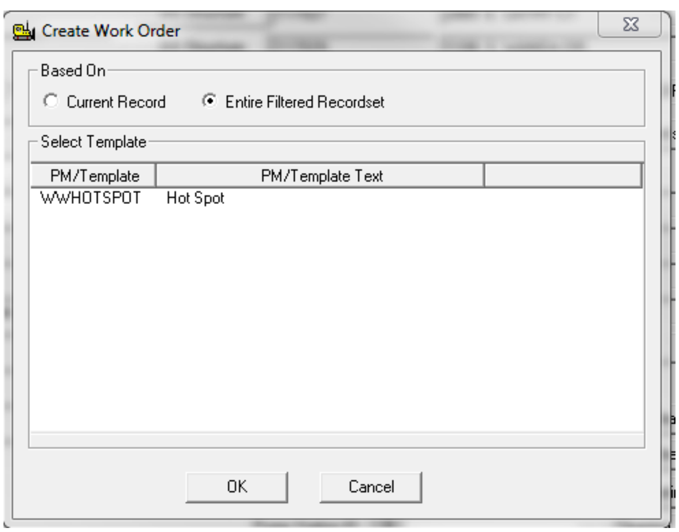


3. Click on the Create New Work Order  button.




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.

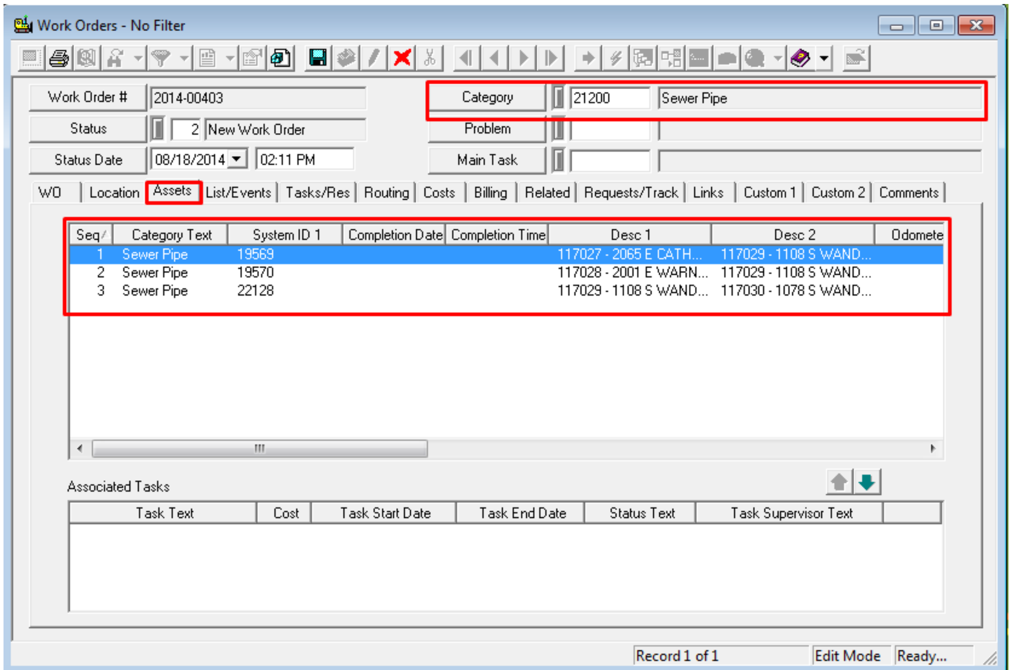



- By selecting 'Entire Filtered Recordset', the new work order will contain all assets included in the current filterset.

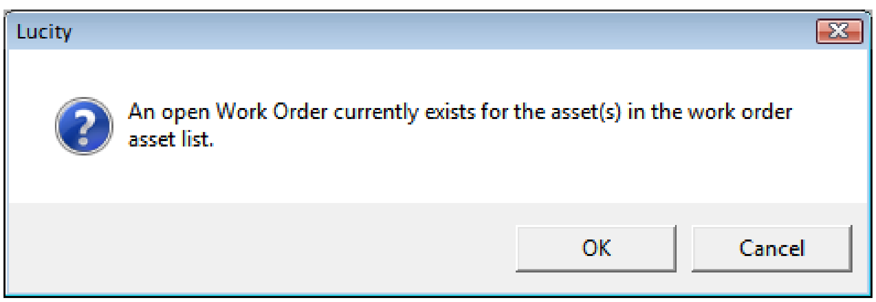
5. Next, you can also choose a PM Template for the work order from the list. This is not required.

- 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*.



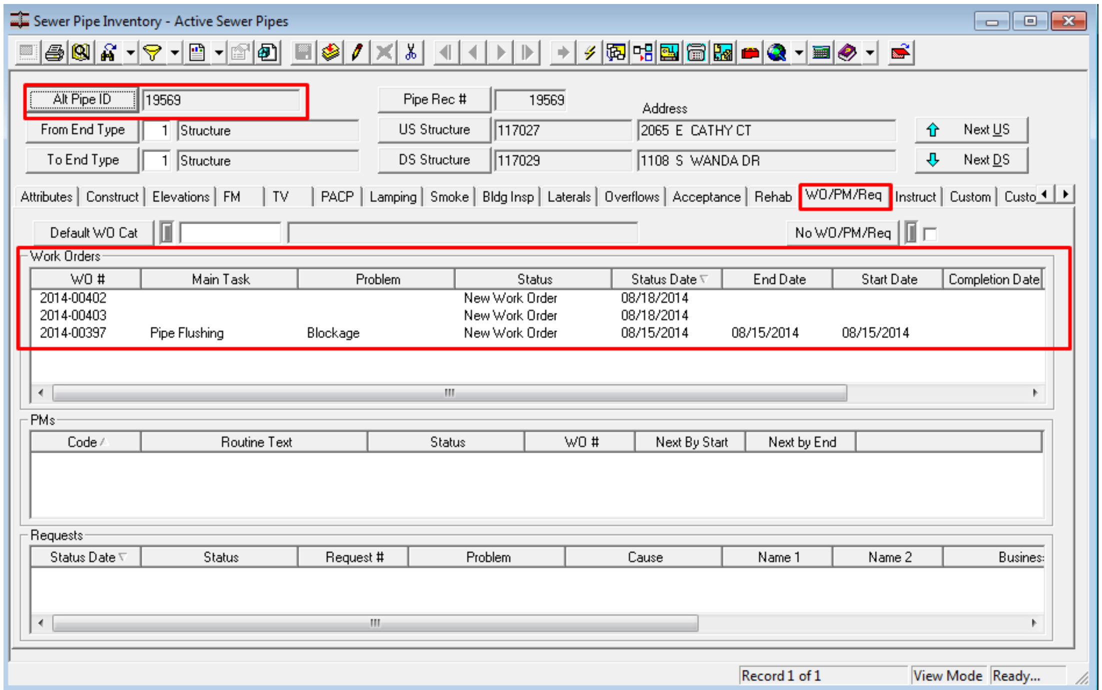

8. If there is an open work order for the asset the following pop-up will appear:




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

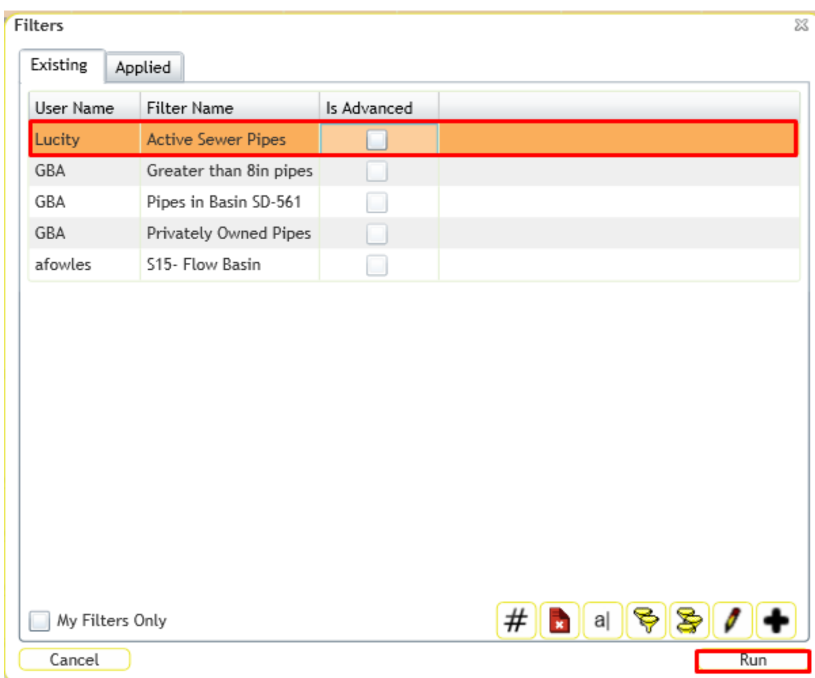
Notes:______________________________________________________________________

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.

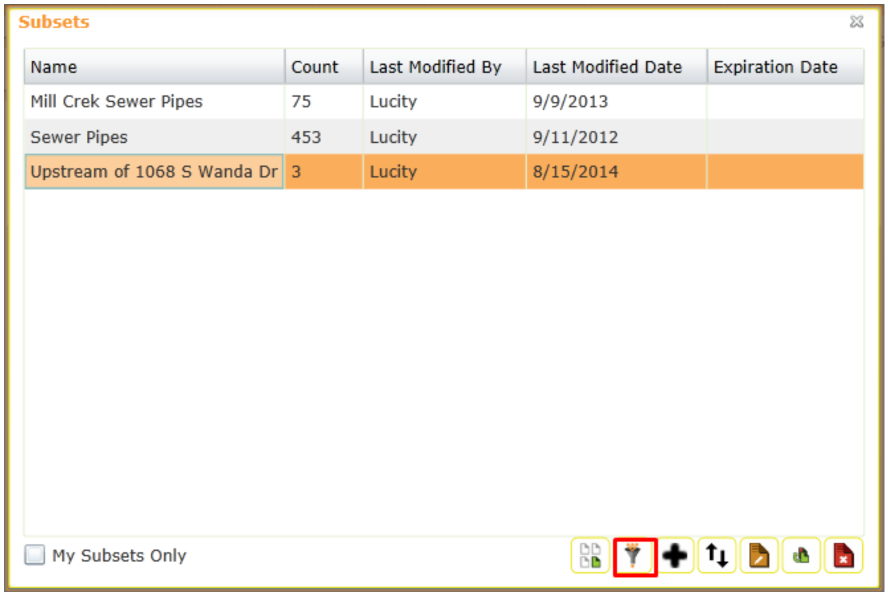



## Creating a Work Order from the Asset in the Web

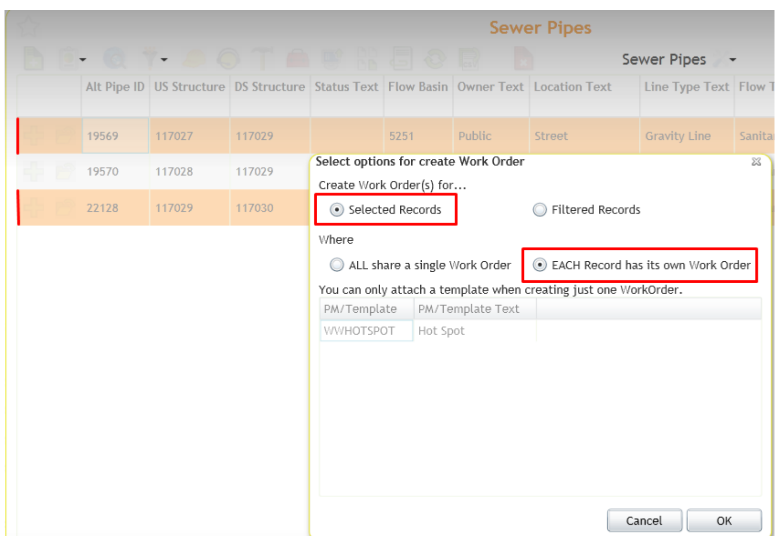
1. We are going to load the same filter for active pipes in the Sewer Pipe Inventory module in the web using the filter  button.



2. 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.

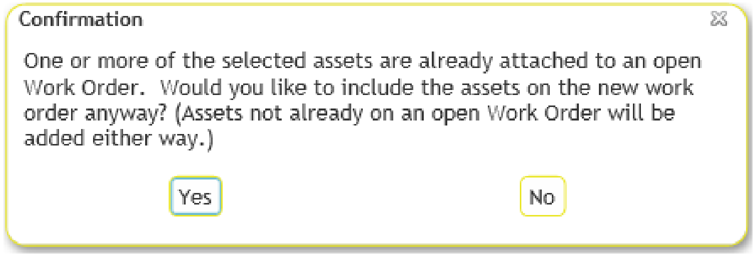



3. Next we will use the create work order button. If we only need to do extra work on 2 of these 3 pipes, in the web we can also select specific records in the current view on top of the filter and subset we've loaded. This time we will create it on the 2 Selected Records. We can also choose a PM Template 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.

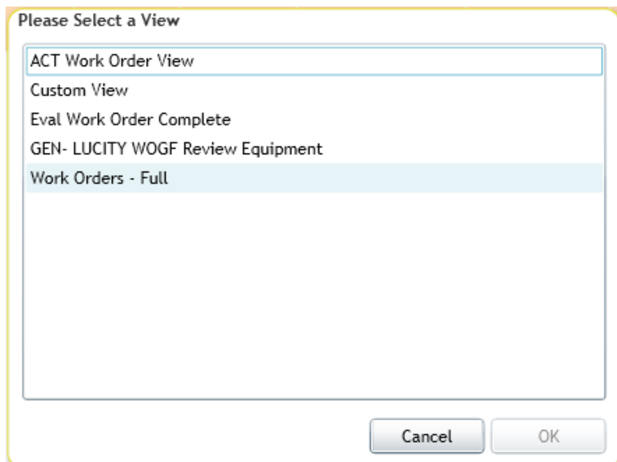



Notes:__________________________________________________________________________

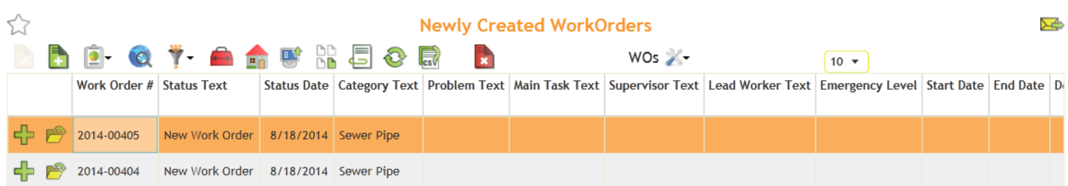
4. Once again you will be prompted if these assets are already on existing Open Work Orders.



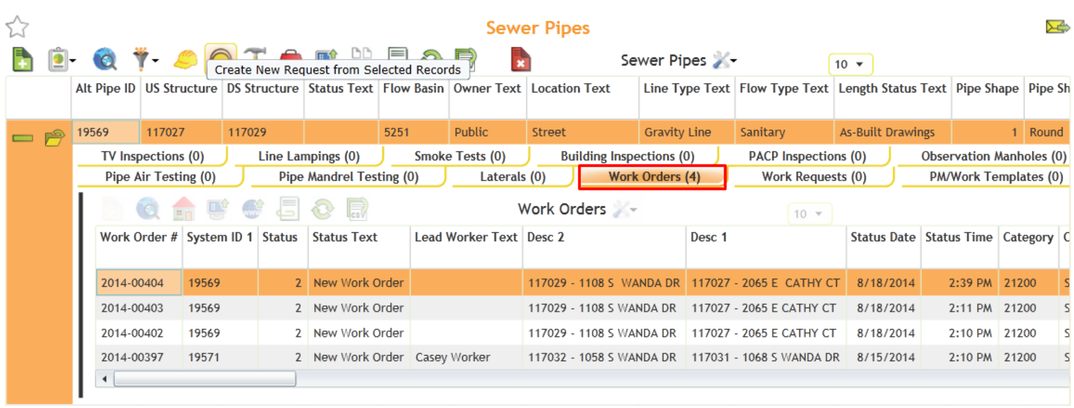

5. You may have access to multiple views in the web. If so, the next step will be to select which view you want to create the work order in. This may be important to be able to include the proper information for this specific work order.




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




7. 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.



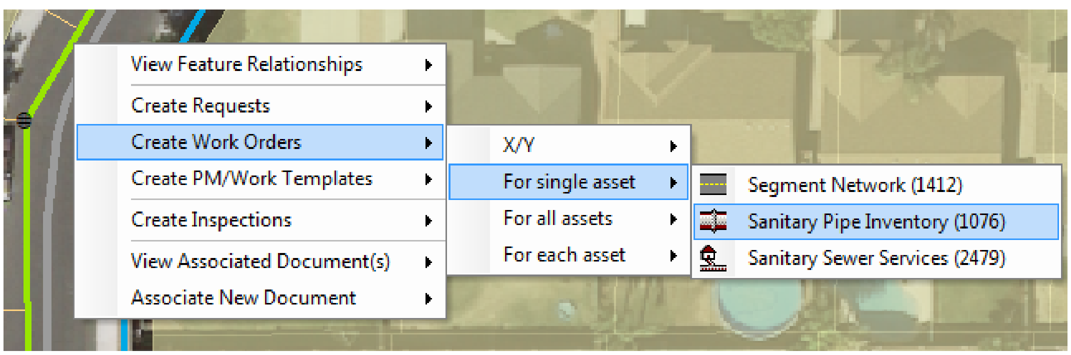
# Creating a Work Order from GIS

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.

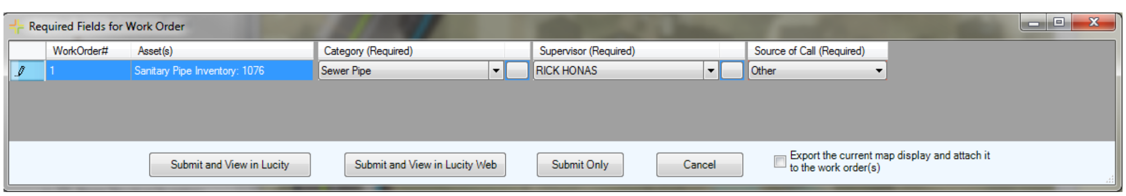
## Create a Work Order from GIS Desktop in ArcMap

1. Open your map project in ArcMap.
2. Click on the Open Module tool  on the Lucity 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.

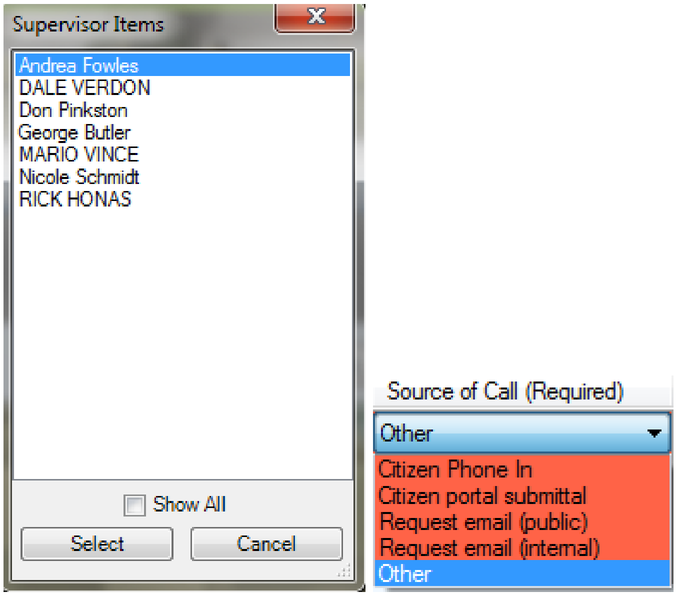



5. The work order dialog shows the fields required to create a work order. The sewer pipe defaults to the Sewer Pipe category, and we can fill in the required fields for Supervisor and Source of Call.

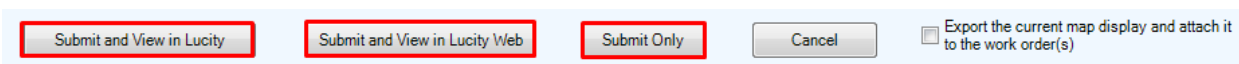



Notes:

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



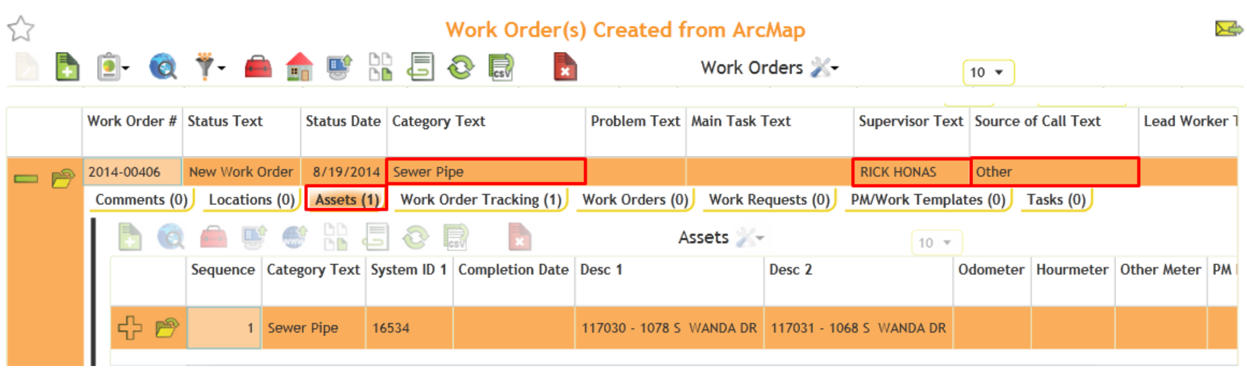

7. After meeting all of the Work Order requirements, select one of the three available submit buttons.




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

8. 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.



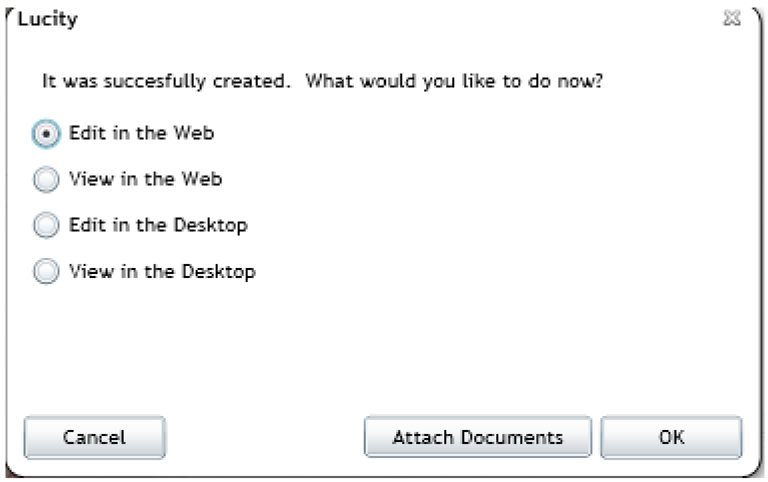

Notes:____________________________________________________________

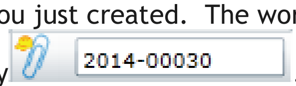
## Create a Work Order from the GIS Web map

1. Open the GIS Web map.

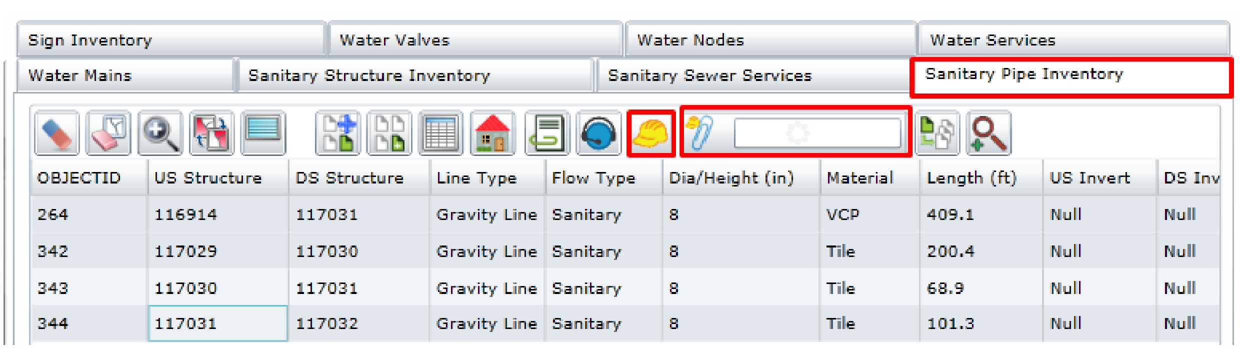
2. You can select an individual asset using the identify  button on the GIS Web map toolbar.

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.




| 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 |

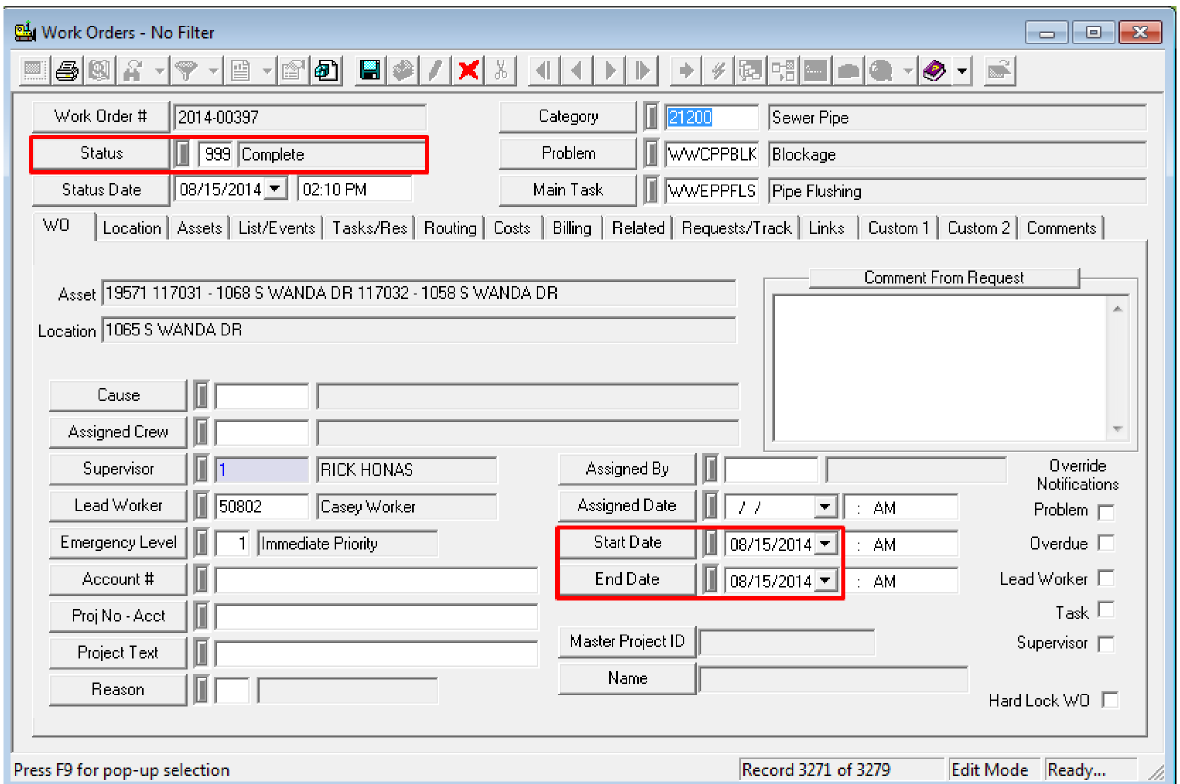
6. Finally, if you aren't sure what assets need to be included, you can always use the map to drop a pin  to give it a location. Then, you can come back and add assets around the location at a later date.

# *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.

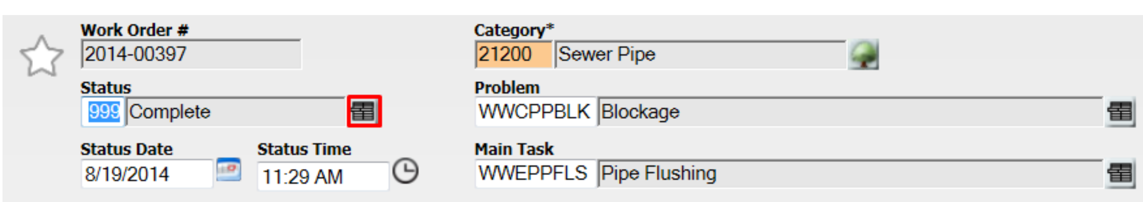
## Completing the Work Order in the Desktop

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.

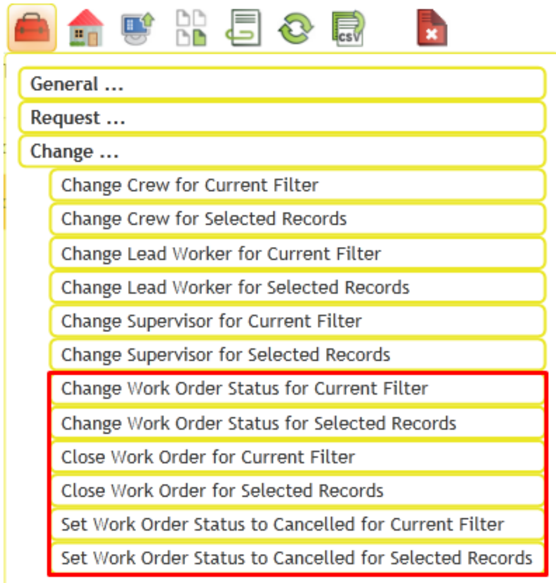



## Completing the Work Order in the Web

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.



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:____________________________________________________________

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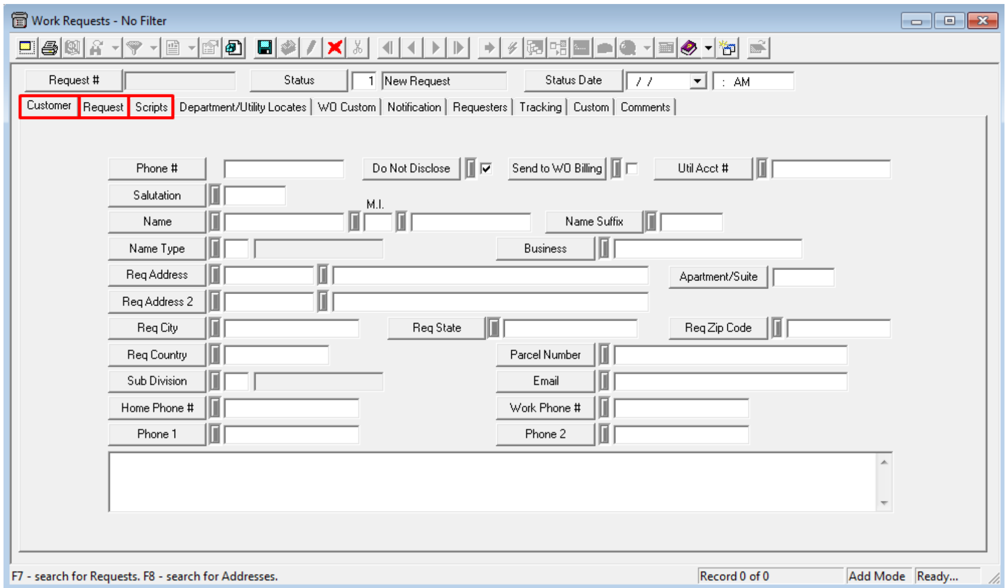
4. The information at top in the **Header** is automatically populated when you save the record.

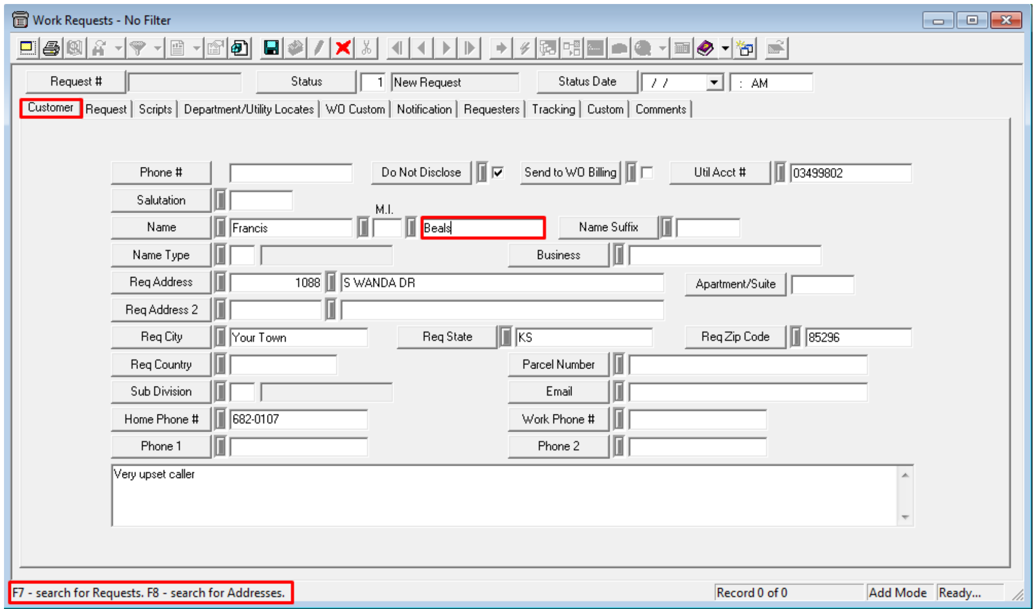



5. On the **Customer** tab, enter information about the caller:

- 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:______________________________________________________________________

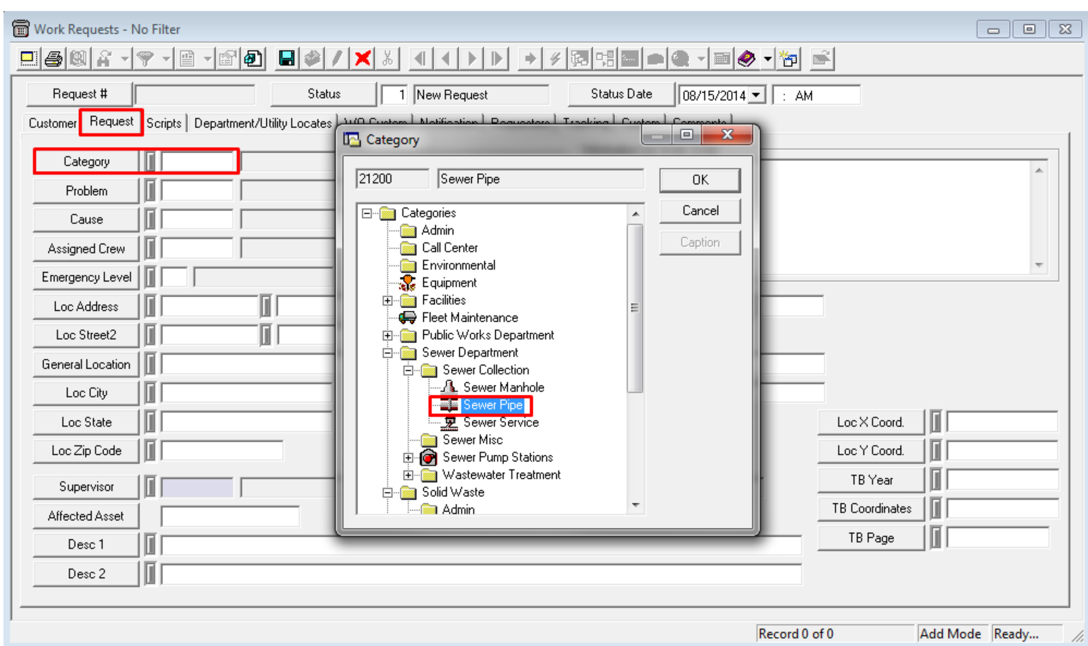
- At bottom is a comments box. Enter any comments about the caller here. We'll enter comments about the issue being called about on a later tab.




- 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.

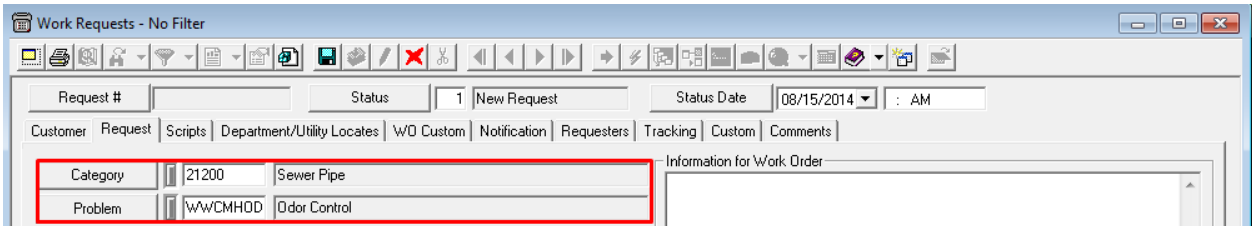
6. Now, open the **Request** tab. We'll use this tab to enter information about the reason for the call.

   - 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.



- 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.

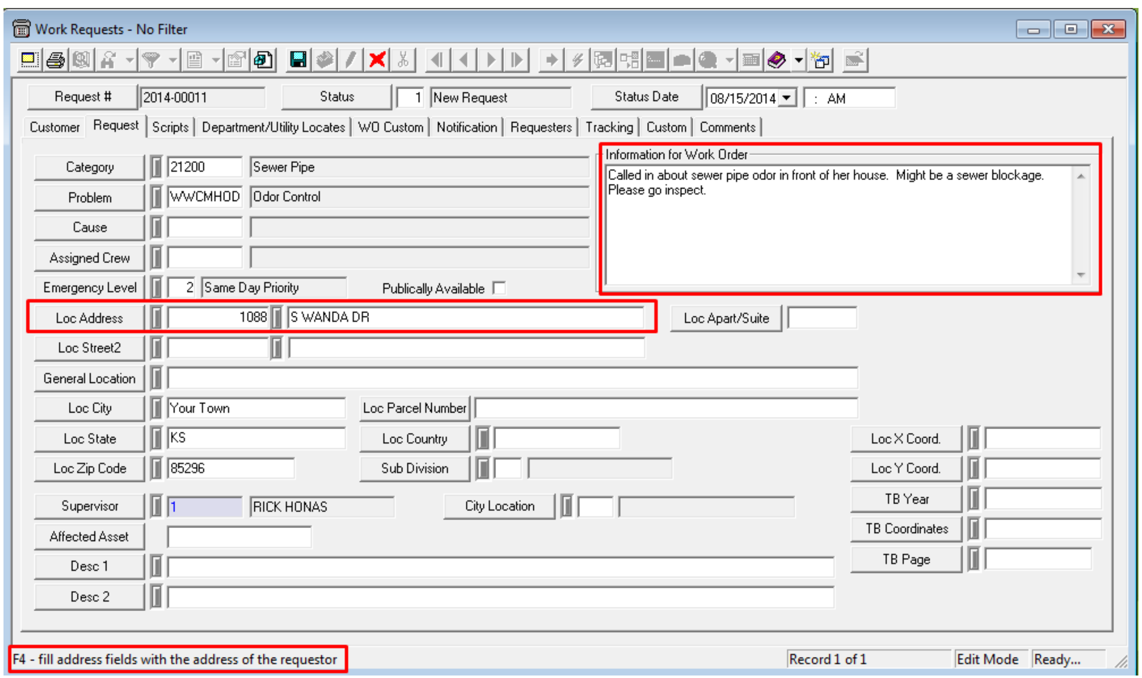
- Next, select a Problem and Cause (if known) in the same manner you chose a Category.




- 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.

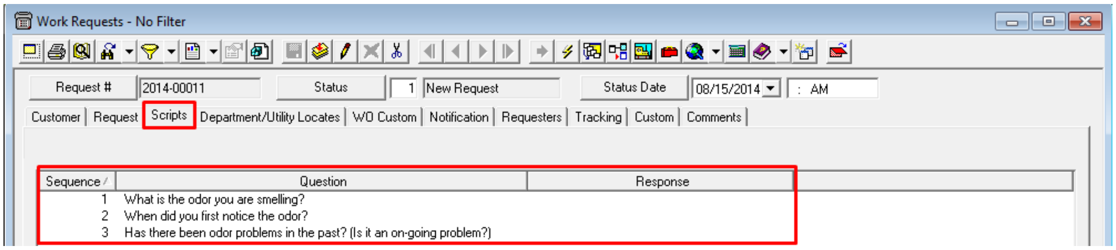



- In our example, Francis Beals has called in to report a sewage odor in front of her home residence. Thus, we have used the F4 function to carry her address forward to this tab.
- To enter additional comments to be carried over to the work order, simply place your cursor in the bottom grid and begin 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.

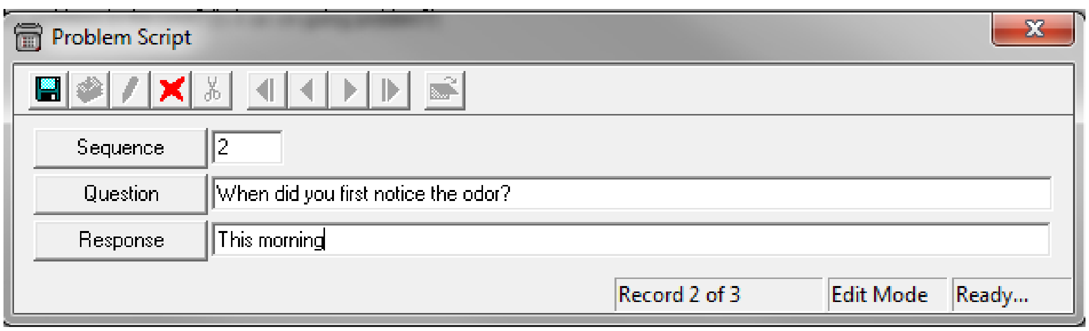
9. Now, open the **Scripts** tab. You'll see two grids. The top grid contains problem scripts and allows you to enter responses. The bottom grid allows you to enter additional comments that will be carried over to the work order.

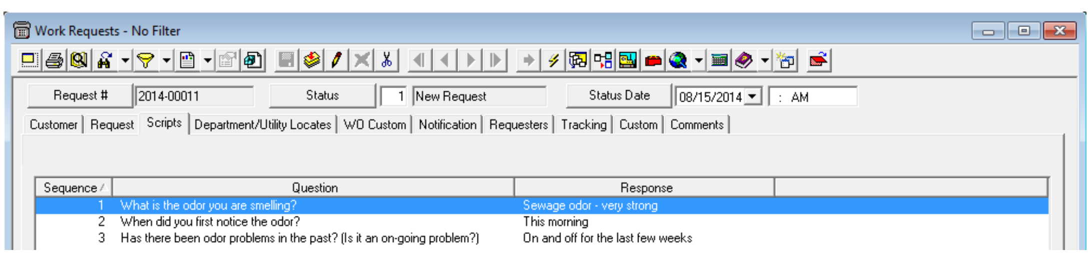
    - Scripts are associated with the problem in the *Work Flow Setup, Problems* module. When you select a problem in the Request tab, any scripts associated with that problem will be carried over automatically.




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.

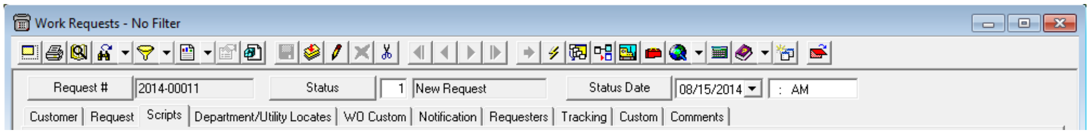



    - In our example, we have recorded responses to the problem scripts. Within the last few weeks is when the sewage odor started. The current odor problem began this morning.

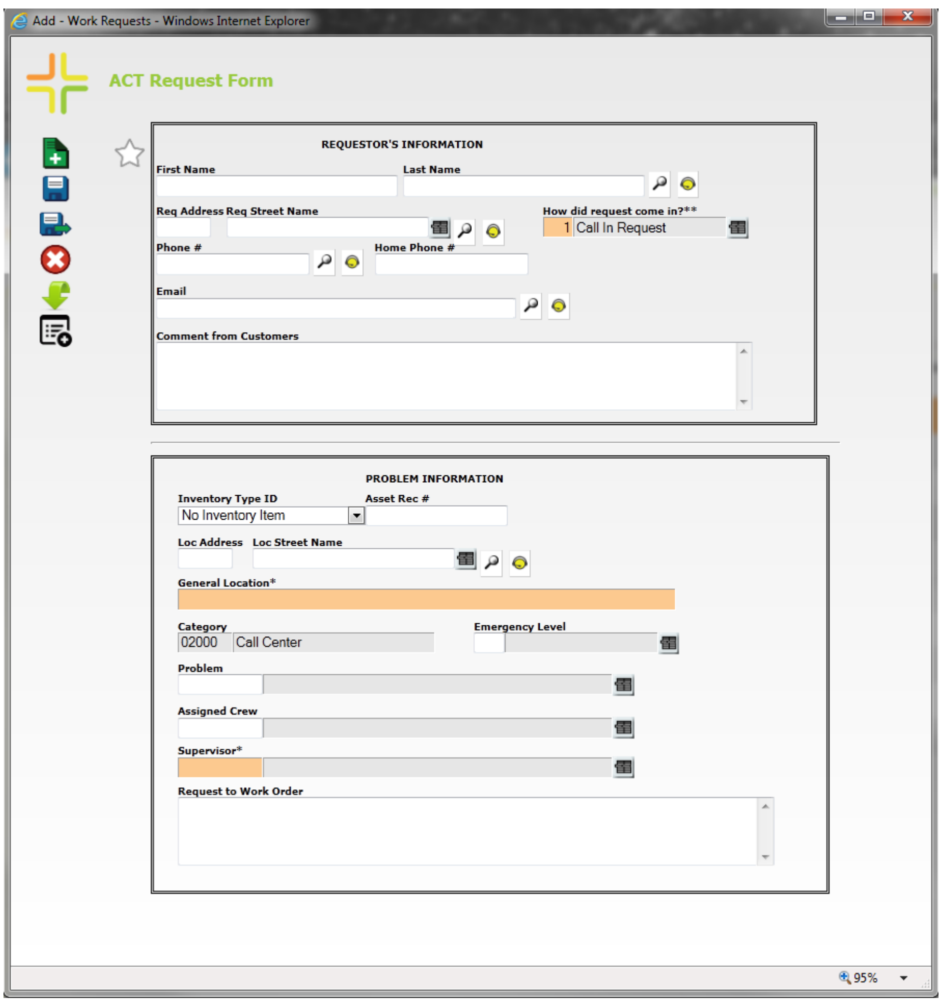
11. The Request is now complete. Once again, we have a required field to be filled in on the custom tab. Fill in a value before saving, check the rest of the data and the press the save button  in the toolbar.

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".

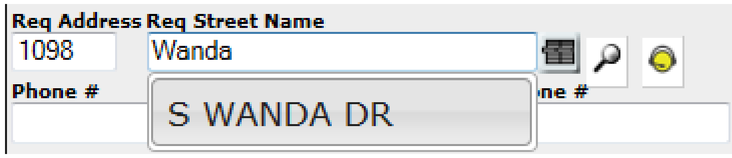



## Creating a Work Request in the Web

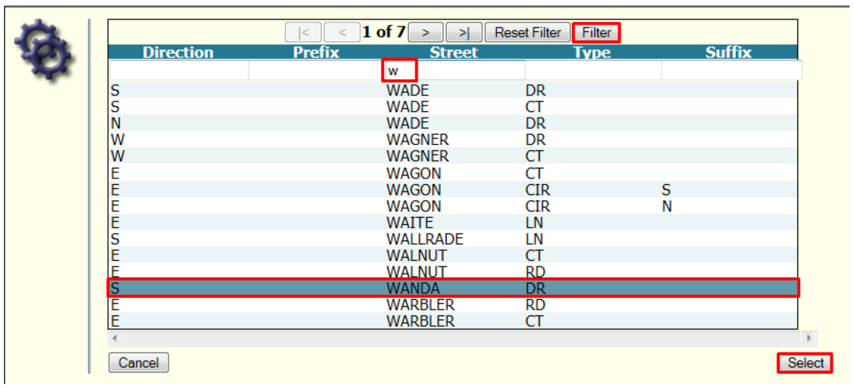
1. Let's do another example, this time using the web. Open the *Work Request* module by opening a Request view or selecting **Modules>>Work>>Work Requests** from the dashboard.
2. Similar to the Work Orders, we can see that the views and grids displayed are customized for our organization.
3. Click *Add 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.



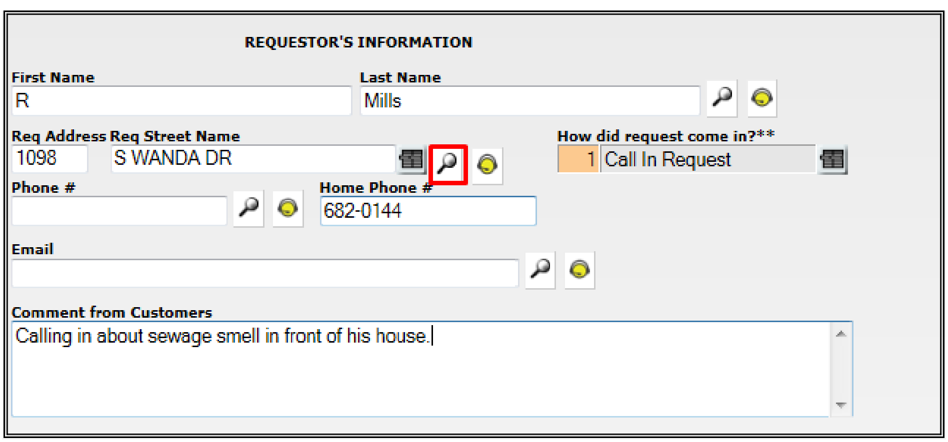
5. First, we will enter in the Requestor's Information in the first section. The caller gives his address as 1098 S Wanda Dr. Type this into the Requestor's address field.




*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.




6. 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.

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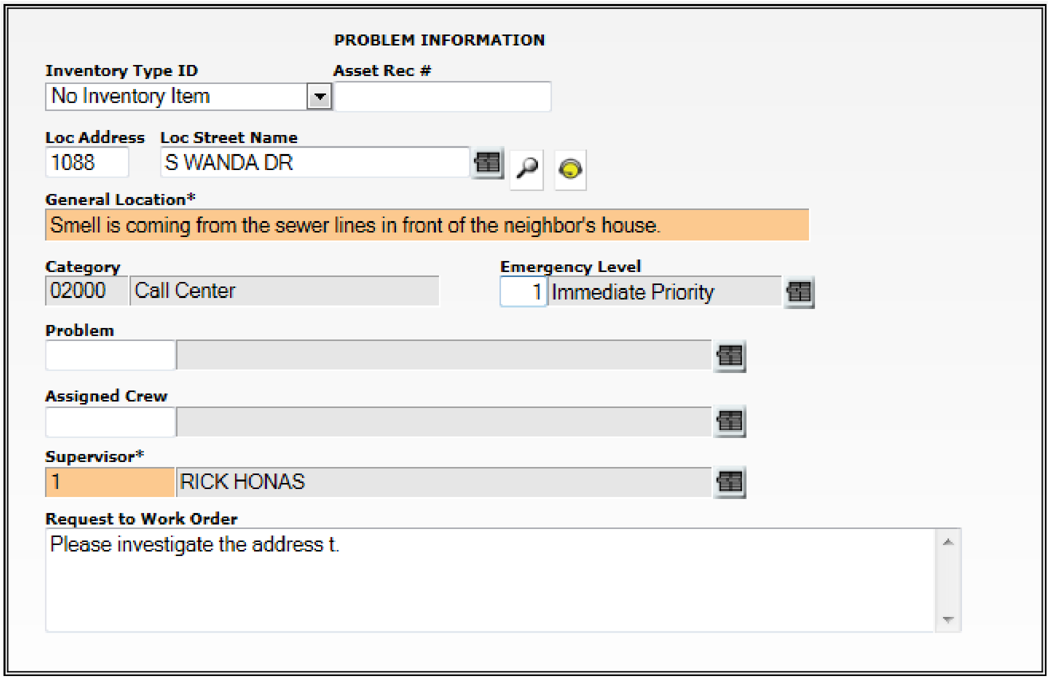
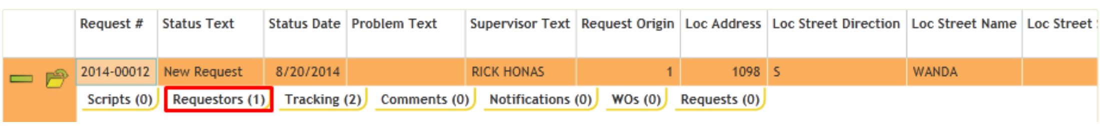
7. Next fill in all relevant Problem Information fields. You will notice there are different required, read-only, limited picklists, and defaulted fields than in the desktop. This is because of additional settings within the specific form that we are using.




8. 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.




## Duplicate Requests

The Requesters 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.

1. 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.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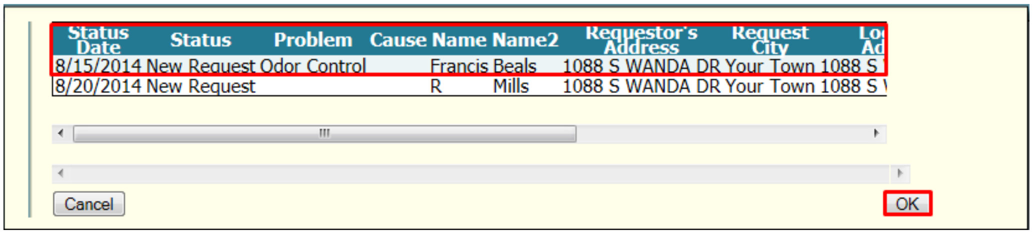
If there are any open requests that match a lookup field, a picklist will open displaying the matching requests.



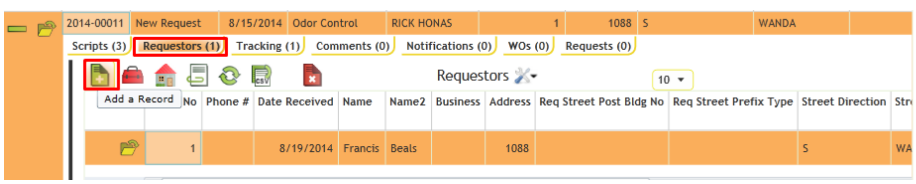

Open up this existing work order.

2. It appears that the problem being reported has already been called in to the system. You have two options.

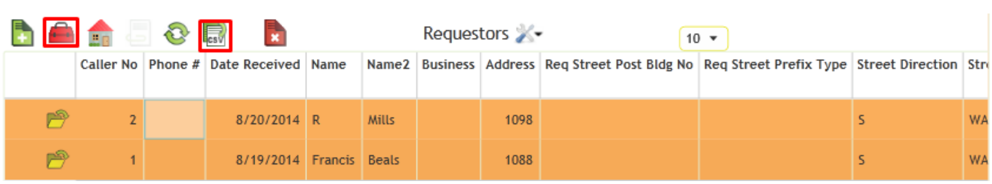
    a. You can keep both requests open and link the requests to each other in the Requests tab using the Attach an Existing Record button.

    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.




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.

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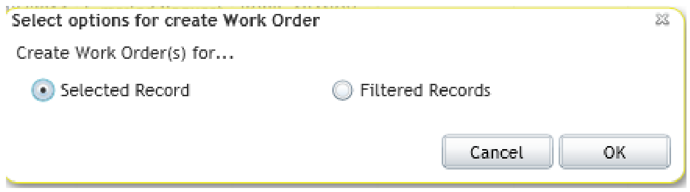
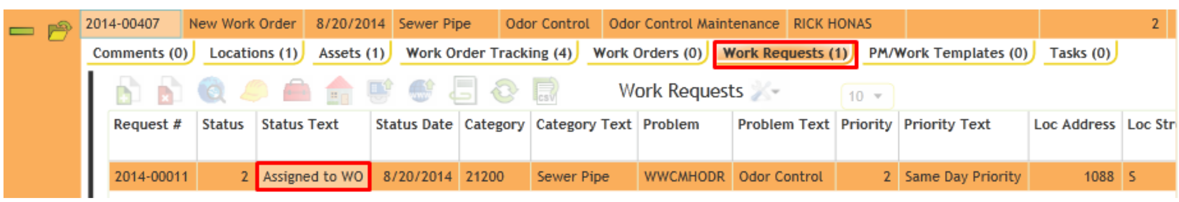
# Creating a Work Order from a Work Request

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.

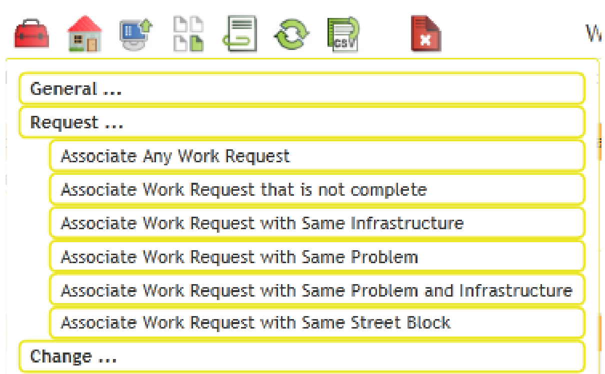
1. Click the Create Work Order button at the top of the *Requests* view. A prompt will appear asking if you want to create the work order on the Selected Records or Filtered Records. Click *Ok* to continue.




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".




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".