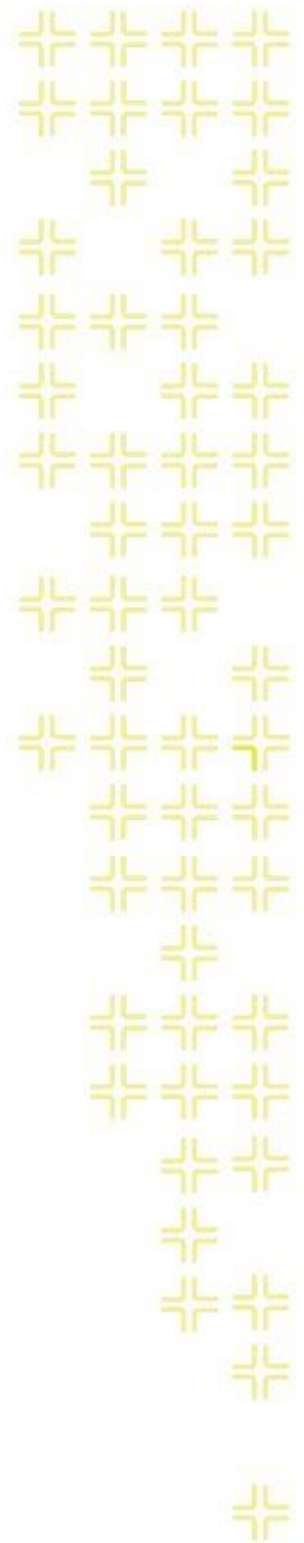




TRAINING GUIDE

Admin

Work Management and Module Tools



Using new tools in Lucy Web

This section covers using tools that were added to Lucy Web in 2018 and 2018r2.

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New Work Management Features - Part 1

Auto-Calculate Units

1. A new Boolean field called “Auto Calc Units” has been added to all Work Order Resource modules. When set to true, Normal Units will become read-only and will automatically calculate a value based on the resource’s start and end dates and times.

The screenshot shows the 'Work Order Employees - Full Form' in the Lucity system. On the left, there are fields for Resource # (1989-1), Alt Description, Department, Class, Group Number, Unit of Measure, Override Unit Cost, Res Account #, Res Proj No - Acct, and Work Clock Status. On the right, there is a table of costs and a section for dates and times. The 'Auto Calc Units' checkbox is checked. Red arrows point to the 'Units' field (7.25) and the 'Auto Calc Units' checkbox.

Units	Regular Hrs	Overtime Hrs	G Total Units	Est Units
7.25	0	0	7.25	0

Unit Cost	Reg Unit Cost	OT Unit Cost	G Total Cost	Est Total Cost
2.5	2.5	4	18.13	0

Res Start Date	Res Start Time	Res End Date	Res End Time
7/26/2018	08:00 AM	7/26/2018	03:15 PM

2. This field can be defaulted to True on the form so that it is always used to calculate units.
3. The following Work Options have been added or modified to conform to this new field:

The screenshot shows the 'Work Options' configuration page. The 'Reset Missed Starting Date PM (A, P, N)' dropdown is set to 'N'. The 'Address Block Range for WOs' is set to 100.00. The 'Carry Over Documents From PM to WO' toggle is OFF. The 'Carry Over Documents To Work Order Defaults To True' toggle is ON. The 'Disable Work Order overdue notifications' toggle is OFF. The 'Minutes to Round Calculated Time to' dropdown is set to 5. The 'Notify user when Asset is already attached to an open Work Order' toggle is OFF. The 'Populate WO Acct # from Main Task #' toggle is ON. The 'Prompt for Comment on Status Change for WO associated to Request' toggle is ON. The 'Round Calculated Time using Floor (F), Ceiling (C), or Away From Zero (R)' dropdown is set to R. The 'Send Status Change Notifications to Requesters' toggle is ON. Red arrows point to the 'Minutes to Round Calculated Time to' and 'Round Calculated Time using Floor (F), Ceiling (C), or Away From Zero (R)' dropdowns.

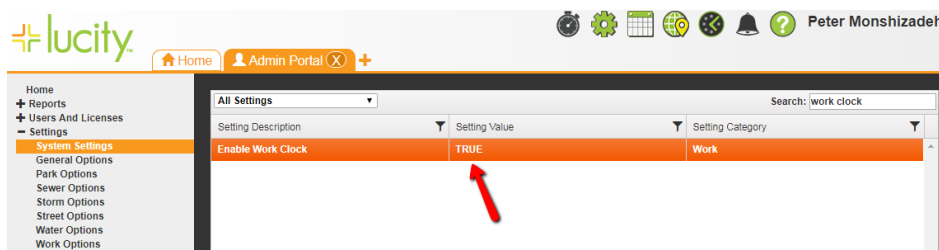
- Minutes to Round Calculated Time to:
 - This option has been converted to a drop down with predefined minute intervals of 5, 10, 15, 30, and 60.
- Round Calculated Time using Floor (F), Ceiling (C), or Away From Zero (R):
 - This option is new for 18R2 and determines which direction to round the resource's total time so that it can be converted to units. This option works directly with the "Minutes to Round Calculated Time to" option.
 - Floor: This means total resource time will round down to the nearest specified minute interval.
 - Ceiling: This means total resource time will round up to the nearest specified minute interval.
 - Away From Zero: "Zero" is the midpoint of the minute increment (Ex: If the interval is set to 10 minutes, then the midpoint would be 5 minutes). The total resource time will either round up or down to the nearest minute interval based on where the actual total resource time falls in relation to the "Zero."
 - Away From Zero: This is "Standard Rounding" or "midpoint" rounding. The total resource time will either round up or down to the nearest minute interval. This is determined by where the actual total resource time falls in relation to the time interval's midpoint. (Ex: If the interval is set to 10 minutes, then the midpoint would be 5 minutes). If actual total resource time falls on the time interval's midpoint, then the total resource time will be rounded up.

Note: There is an older Work Option called "Use Start and End Times to Calculate Hour Units." This option will default units based on start and end times, but only when units is empty. We recommend turning this option Off if using "Auto Calculate Units."

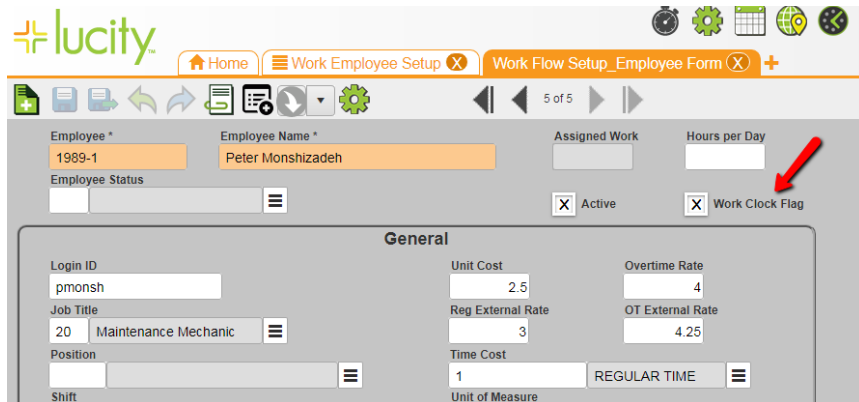
Commented [NS1]: Let's add a brief discussion here about the old work option and how that works. The old work option will default units based on start and end times, but only if units is empty. So, we recommend not using that option and instead using auto calc units.

Work Clock

- Purpose: Work Clock allows users to track actual time worked on Work Order tasks with the use of Start & Stop buttons. This feature is only available in Lucy Web.
- To enable the Work Clock features:
 - System Settings: Enable Work Clock
 - When this setting is turned on, the Work Clock features will be activated for the web client.



- Work Flow Employee Setup: Work Clock Flag
- When this flag is set to True, the user associated to the employee setup record (linked through Login ID) will be able to see the work clock icons in the widget bar and on the Work Order view. Ultimately, this means this user will be able to Start & Stop a work clock.



Lucity

Home Work Employee Setup Work Flow Setup - Employee Form

Employee * 1989-1 Employee Name * Peter Monshizadeh Assigned Work Hours per Day

Employee Status ☒ Active ☒ Work Clock Flag

General

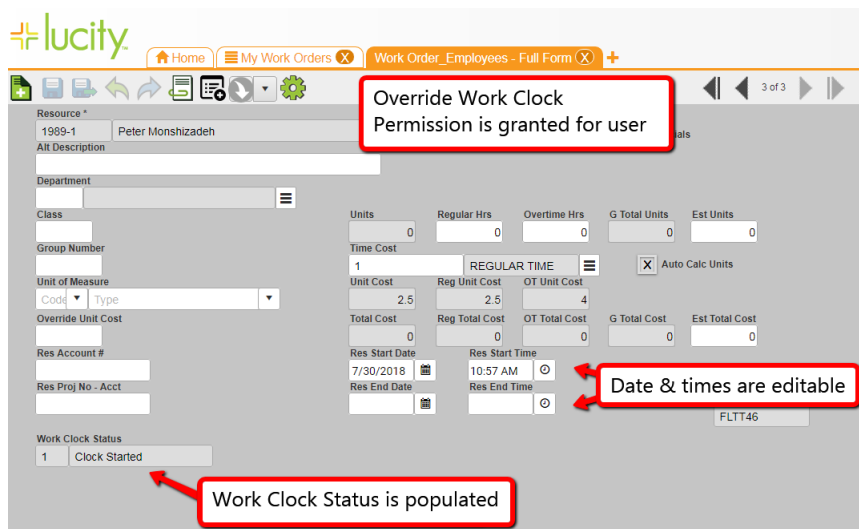
Login ID pmonsh Unit Cost 2.5 Overtime Rate 4

Job Title 20 Maintenance Mechanic Reg External Rate 3 OT External Rate 4.25

Position Time Cost 1 Unit of Measure REGULAR TIME

Shift

- Work Orders Permission: Override Work Clock
 - When this permission is granted, the user will be able to manually edit the Start/End Date & Times for Work Order resources where the Work Clock Status field is populated. When the permission is not granted, then Start/End Date & Times are read-only for resources where the Work Clock Status field is populated.



Lucity

Home My Work Orders Work Order - Employees - Full Form

Resource * 1989-1 Peter Monshizadeh Alt Description

Department Class Group Number Unit of Measure Code Type Override Unit Cost Res Account # Res Proj No - Acct

Override Work Clock Permission is granted for user

Units Regular Hrs Overtime Hrs G Total Units Est Units

Time Cost 1 REGULAR TIME ☒ Auto Calc Units

Unit Cost 2.5 Reg Unit Cost 2.5 OT Unit Cost 4

Total Cost 0 Reg Total Cost 0 OT Total Cost 0 G Total Cost 0 Est Total Cost 0

Res Start Date 7/30/2018 Res Start Time 10:57 AM

Res End Date Res End Time

Work Clock Status 1 Clock Started

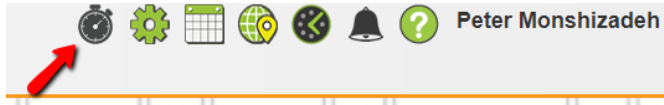
Date & times are editable

Work Clock Status is populated

FLT46

- New UI features related to Work Clock:

- Clock icon in widget bar



- Shows Active Clock
- Shows history of 3 most recent active clocks
- Allows stopping of the logged-in user's active clock
- Allows the logged-in user to navigate to active and previously-active work clock work orders

- Clock icon on Work Order grid

 A screenshot of the 'Work Orders' grid in the iUCity application. The grid has columns: Work Order #, Category, Problem, Main Task, Priority, Reason, Lead Worker, and Status. A red arrow points to the clock icon in the 'Main Task' column of the first row.

Work Order #	Category	Problem	Main Task	Priority	Reason	Lead Worker	Status
18-494197	Fleet Maintenance		Exhaust System				Ne

- Allows starting work clock
- Allows stopping a running work clock
- Allows switching of the active work clock task

- Clock icon in Work Order Task grid:

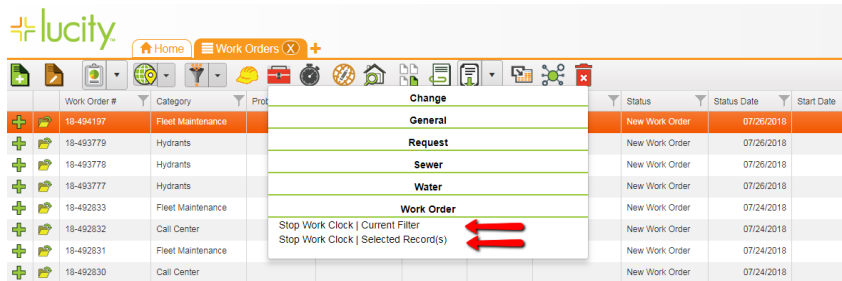
- Shows task(s) where work clock is actively tracking time

 A screenshot of the 'Work Order Task' grid. The grid has columns: Seq No, Task, Task Text, Task Crew, UOM, Unit Cost, Calc'd Unit Cost, # of Units, and Lock Units. A red arrow points to the clock icon in the first row.

Seq No	Task	Task Text	Task Crew	UOM	Unit Cost	Calc'd Unit Cost	# of Units	Lock Units
1	FLT46	Engine	Fire		0	0	0	
2	FLT38	Drivetrain			0	0	0	

Notes: _____

- New toolkits for the Work Clock feature:
 - “Stop Work Clock” Toolkits in Work Orders
 - Allows a supervisor to stop any running clocks at the end of the day.



- New fields for the Work Clock feature:
 - The “Auto Calc Units” field has been added to Employee and Equipment
 - When a clock is started for an employee and/or equipment resource, this field will automatically be set to true and made read-only. This ensures the resource units are calculated automatically and accurately when the work clock is stopped.
 - “Work Clock Status” has been added to Employee and Equipment resources
 - This field is read-only and is updated only by the Work Clock
 - There are three values that can appear in this field:
 - 1 – Clock Started: This means the resource is currently tracking time with the work clock.
 - 2 – Clock Stopped By User: This means the resource is no longer tracking time with the work clock and the clock was stopped either through the Work Clock buttons or through the Stop Work Clock toolkits.
 - 3 -Clock Auto-Stopped: This means the Nightly Service has stopped the

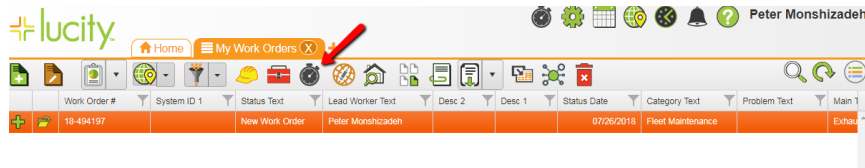
work
clock.

How to use Work Clock

Let's start with a scenario to better understand how Work Clock functions. Peter, the logged in user, is a mechanic in the fleet maintenance department who has a work order on his dashboard. This work order has a couple of tasks on it that need to be completed today.



- With the Work Order record opened in the Work Order view, Peter now wants to start tracking his time on the work order. He does this by selecting the work order record in the grid.



- With the single Work Order record selected in the grid, the work clock button on the Work Order view becomes active. Peter clicks on the button to initiate the Work Clock sequence.
- A list of all tasks on the Work Order display. Peter selects the task he wants to start tracking time on.

Notes: _____

Note: Only tasks with an End Date value of the current date, a future date, or a blank date will show in this list.

Task Code	Task Text	Task Start Date	Supervisor Code	Supervisor Text
FLTT46	Engine	7/30/2018	0104	Manya Borgmeyer
FLTT38	Drivetrain	7/30/2018	0110	Sam McReynolds

- Upon selecting the task in the list, Peter then clicks “Select Task”. This confirms the task and then opens the Employee Resource list. The employees shown in this list will start tracking time on the task when the work clock is started. Some details about this employee list screen:
 - The logged in user will always show in this list and cannot be removed.
 - Any employees already on the task as resources will show in this list.
 - Additional employees can be added to the list through the “Add Additional” button.
 - Employees can be removed from the list through the “Remove” button.

Employee Code	Employee Name	Department Name	Department Code
1989-1	Peter Monshizadeh		
0101	Jeannette Bandy	Bridges	PB
0095	Cody Pickrell	Landfill	UOL

- The Work Clock can be started from the Select Employees screen by clicking the “Start Work Clock” button. However, Equipment can also be selected to track time as well. To do this, click the “Select Equipment” button.

Note: If the Work Clock is started from the Select Employees screen, then no equipment will have time started with the Work Clock.

Note: Employees do not need to be selected in the list to be included in the Work Clock. If they simply appear in the list, then that indicates they will be included in the Work Clock.

- The “Select Equipment” screen functions similarly to the Select Employees screen. Equipment already on the task will automatically load in the list. Equipment can be removed or added through the buttons at the bottom of the screen.

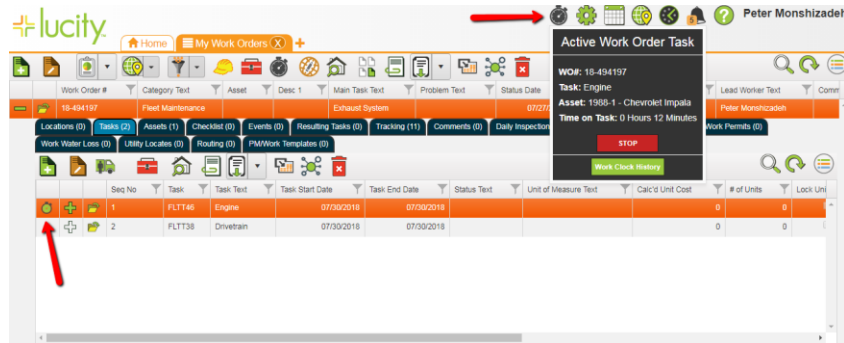
Note: Equipment resources do not need to be selected in the list to be included in the Work Clock. If they simply appear in the list, then that indicates they will be included in the Work Clock.

Equipment Code	Description	Department Name	Department Code
0032	Trailer, Equip (mowers/small equip tilt transp.)		
0079	Pick Up, 4x4, 1-1/2 ton w/utility bed, Ford		

Buttons at the bottom: Cancel, Add Additional, Remove, Start Work Clock.

- The “Start Work Clock” button on the “Select Equipment” screen will initiate the work clock for all resources that appeared in the Employee and Equipment screens.
 - Employees and equipment that weren’t already on the task before initiating the work clock will be automatically added as resources on the task.
 - Employees and equipment that were already resources on the task before initiating the work clock, but had either units or an end date specified, will be re-added to the task (as duplicate resource records).
 - Duplicate resource records are added under these conditions because each resource record serves as its own unique time tracking record. Once a block of time is recorded for a resource (One start and stop of the clock), then a new resource record will be needed in order to record a new block of time.

- Once the clock has started, a few places in the app will update to signify that time is now being tracked.
 - The Widget Bar work clock icon will display the active work order and task, along with total time of the work clock session.
 - A clock icon will display next to the active work clock task under the Work Order.



Notes: _____

- A start date and time is written to each Employee & Equipment resource that was present in the Work Clock initiation sequence. The value entered will be the date and time from when the work clock was started. Other changes that are made to the work clock resources:
 - A value of “Clock Started” is written to all the selected resources’ Work Clock Status field.
 - The “Auto Calc Units” field is automatically set to True and made read-only in all the selected resources.
 - Normal Units is made read-only.

The screenshot shows the Lucity Work Orders interface. A table lists resources with their work clock status. A red box labeled "Work Clock Status" points to the "Clock Started" status in the table.

Resource	Work Clock Status Text	Time Cost Text	Res End Date	Resource Text	Alt Description	Department Text	Class	Group
0005	Clock Started	REGULAR TIME		Cody Pickrell		Landfill		
0101	Clock Started	REGULAR TIME		Jeannette Bandy		Bridges		
1989-1	Clock Started	REGULAR TIME		Peter Monshizadeh				

The screenshot shows the Lucity Work Order - Employees - Full Form interface. It displays details for resource 1989-1, Peter Monshizadeh. A red box labeled "Normal Units is read-only" points to the "Normal Units" field. Another red box labeled "Auto Calc Units is set to true" points to the "Auto Calc Units" checkbox. A third red box labeled "Start date & time populated" points to the "Res Start Date" and "Res Start Time" fields. A fourth red box labeled "Work Clock Status" points to the "Work Clock Status" field.

Resource * 1989-1 Peter Monshizadeh

Alt Description

Department

Class

Group Number

Unit of Measure

Code Type

Override Unit Cost

Res Account #

Res Proj No - Acct

Work Clock Status 1 Clock Started

Units Regular Hrs Overtime Hrs G Total Units Est Units

Time Cost 1 REGULAR TIME

Unit Cost Reg Unit Cost OT Unit Cost

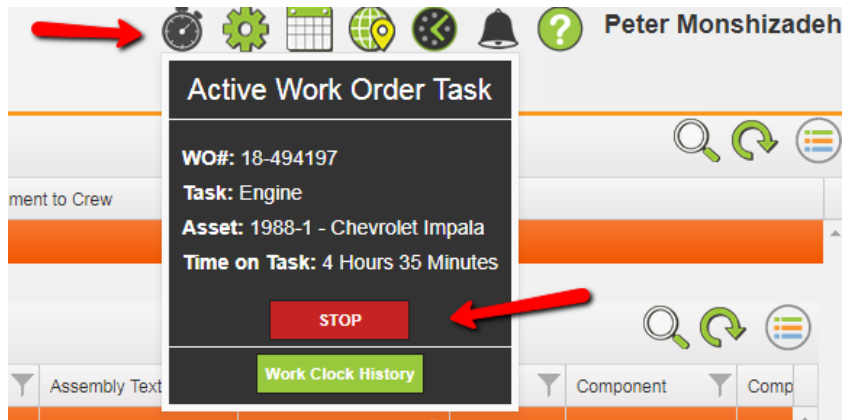
Total Cost Reg Total Cost OT Total Cost G Total Cost Est Total Cost

Res Start Date 7/30/2018 Res Start Time 10:57 AM

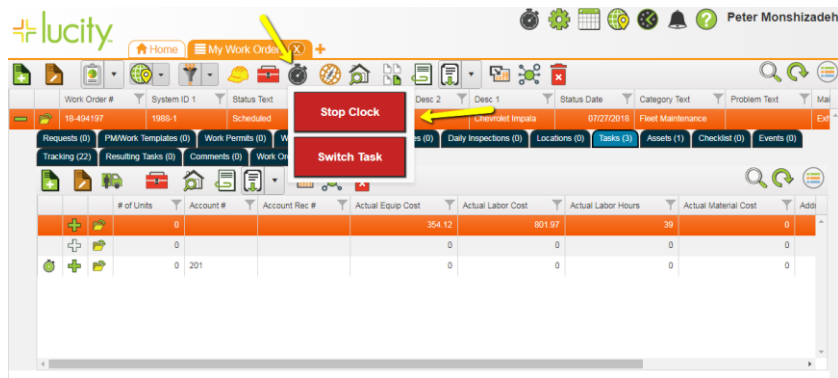
Res End Date Res End Time

Task FLTT46

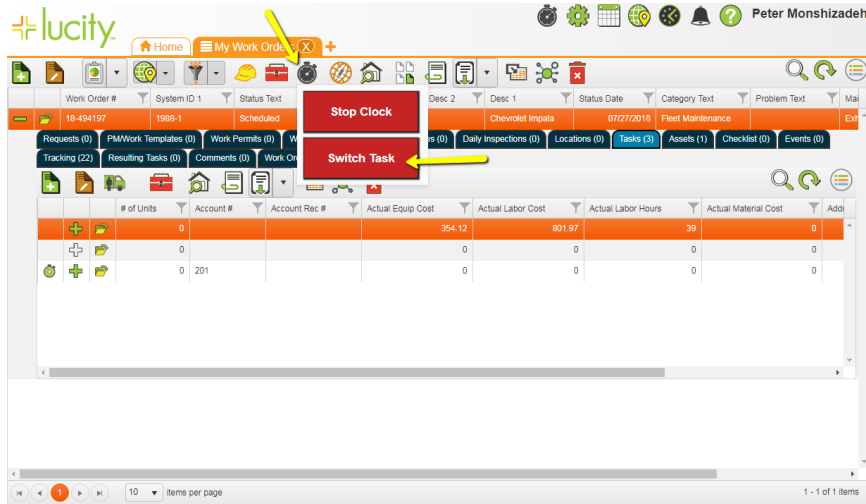
- **Stopping the clock.** Any employee resource on the task that is tracking time (Has a Work Clock Status = Clock Started) can stop the clock, if the employee is configured to do so (The Work Clock flag in their work employee setup record = True).
 - Peter would like to stop the clock because he has finished work on the task. He can stop the clock a few different ways:
 - Widget bar work clock icon: This allows the clock to be stopped from anywhere in the web app – the Work Order doesn't record doesn't have to be open in a view to stop the running work clock.



- Work Order View clock button – Stop Clock.
 - The work order record with the actively running work clock does not need to be selected in the grid in order to stop the clock from this button.



- Work Order View clock button – Switch Task.
 - The purpose of this button is to seamlessly stop the clock for the current task and start the clock on a new task.
 - In order to use Switch Task, a single work order will need to be selected in the grid.

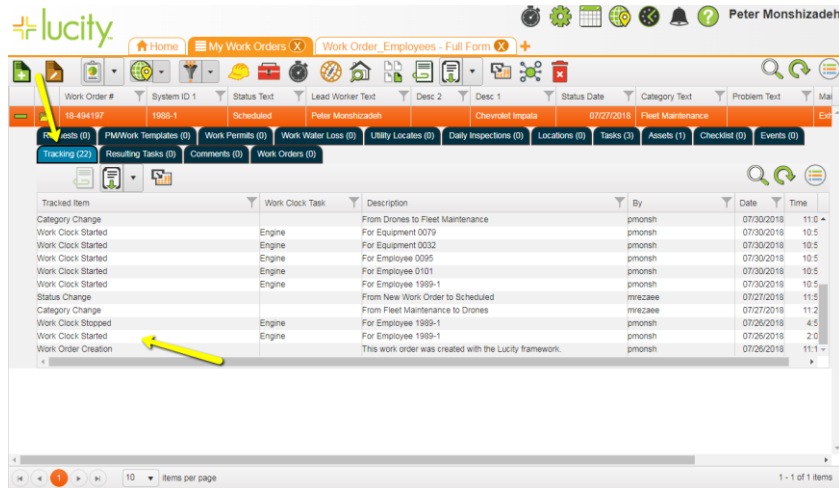


- Stop Work Clock toolkits. Using these toolkits is not in best practice if you're only stopping your own running Work Clock. The goal behind these toolkits is not so much for stopping a clock that you personally started, but more for stopping clocks on work orders that you haven't started or are not a resource on. These toolkits give supervisors the ability to stop erroneously running clocks at the end of the work day.

Notes: _____

Work Clock and its effect on the Work Order Tracking grid

- The work order tracking grid records when a task's resources have time started and stopped.
 - For Example: When Peter started the clock on the Work Order task, the Work Order Tracking grid wrote an entry stating the clock had been started for his employee resource record. A similar entry will also be recorded when the clock is eventually stopped.



Tracked Item	Work Clock Task	Description	By	Date	Time
Category Change		From Drones to Fleet Maintenance	pmonsh	07/30/2018	11:0
Work Clock Started	Engine	For Equipment 0079	pmonsh	07/30/2018	10:5
Work Clock Started	Engine	For Equipment 0032	pmonsh	07/30/2018	10:5
Work Clock Started	Engine	For Employee 0095	pmonsh	07/30/2018	10:5
Work Clock Started	Engine	For Employee 0101	pmonsh	07/30/2018	10:5
Work Clock Started	Engine	For Employee 1999-1	pmonsh	07/30/2018	10:5
Status Change		From New Work Order to Scheduled	mrezace	07/27/2018	11:5
Category Change		From Fleet Maintenance to Drones	mrezace	07/27/2018	11:2
Work Clock Stopped	Engine	For Employee 1999-1	pmonsh	07/26/2018	4:5
Work Clock Started	Engine	For Employee 1999-1	pmonsh	07/26/2018	2:0
Work Order Creation		This work order was created with the Lucy framework.	pmonsh	07/26/2018	11:1

- Nightly Processes and the Work Clock
 - There is a Nightly Process in place to automatically stop work clocks. This ensures that no single work clock session goes on forever by accident. The following Work Option determines how the Nightly Process handles the stoppage of long-running clocks:
 - Work Option: Enforce Resource End Date = Start Date
 - When option is set to ON:** The Nightly Process will stop all running clocks at midnight.
 - When option is set to OFF:** The Nightly Process will stop clocks that have accumulated 10 hours.
 - When the Nightly Process stops a work clock, the work clock resource records will have a Work Clock Status value of "Clock Auto-Stopped."
 - Limited Permission Users and access to Work Clock features
 - The user will need to have Work Order edit permissions (General Edit or Edit Own) to start and stop a work clock.

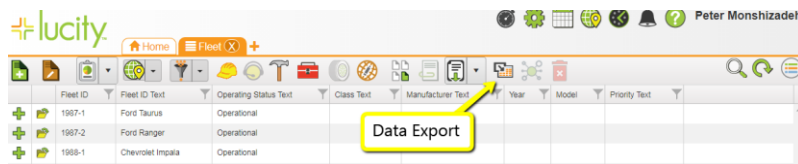
Commented [NS2]: I think after this section it would be good to go over how a supervisor (or someone with override work clock permission) can manipulate start and end times. I think it also would be good to go over the tracking events we log for work clock.

Commented [PM3R2]: Make notes on printed copy

New Module Tools

Export to Excel

The Data Export button, which is a button available to be added to module views, allows you to export the current filter of records in a module. The exported file will contain the data from columns that are either present in the module view's grid or are available from a column template that you create inside the export tool itself.



- Upon clicking the Data Export button, the following screen will appear.

Data Export: Fleet Inventory

Number of Records to be exported: 41

☒ Use Current View

File Format Option:

☒ XLSX - Excel ☐ CSV - Comma Delimited

Email or Download Results:

☐ Email ☒ Download

Cancel **Export**

- If you want to export the columns present in the current view, then leave "Use Current View" checked.
- If you want to export a file with different columns that are in the view, you can define a custom column template. To do this, uncheck "User Current View." Upon unchecking, the screen will update to look like this:

Notes: _____

Data Export: Fleet Inventory

Number of Records to be exported: 41

☐ Use Current View

File Format Option:

- ☒ XLSX - Excel
- ☐ CSV - Comma Delimited

Email or Download Results:

☐ Email ☒ Download

Cancel **Export**

- Then, select the file format you would like to export the view to. For this example, we'll choose Excel (XLSX).
- Now, select the method in which to receive the file.
 - If you choose *Download*, the file will immediately download to your computer when you select "Export."

Note: If popups are blocked on the browser, the file may not download.

- If you choose *Email*, then the following screen will appear:

Data Export: Fleet Inventory

Number of Records to be exported: 41

☐ Use Current View

File Format Option:

- ☒ XLSX - Excel
- ☐ CSV - Comma Delimited

Email or Download Results:

☒ Email ☐ Download

Subject Line on Email:

Lucity Export for Fleet Inventory

Name of Attachment file for Email:

Fleet General Export

Extension for the compressed exported file:

.zip

Emails to send exported file to:

pmonshizadeh@lucity.com **remove** **add**

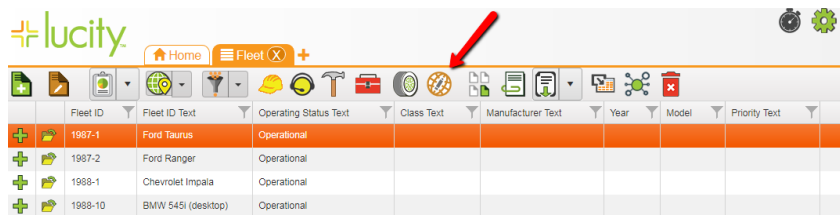
Cancel **Export**

- Your user's email address will automatically be added as a recipient of the exported view. You can add or remove additional email address here as well. Upon clicking "Export," the file will be pushed to the email queue table and then sent out when the email process runs.

Commented [NS4]: In this section, I would put a warning that if popups are blocked on the browser, the file may not download.

Global Edits

The Global Edits feature allows the user to update the value in a single field across many records in a module at once. The Global Edit button is located on the module's main grid.



- Before opening the Global Edit feature, you will want to already know which records you want to edit in the module. Also, you'll want to know what the field is that you want to update within this set of records, and, you want to know what the value is that you want to update this field with.
- Set up a filter in the module that contains the records you want to edit. Or, alternatively, simply point out the records you want to edit by multi-selecting them from the module grid. With the records you want to edit now defined, click the Global Edits button.
- When you click on the Global Edits button, the following dialog window will appear:

Global Edits: Fleet Inventory

Property To Update

Value To Update With

Apply Null Value

Property Name

☐

Records To Apply Changes To

☒ Selected Record(s)

☐ Current Filter

Update Behavior

☒ Perform Validations, Calculations, and Behaviors

Emails to notify on completion.

pmonshizadeh@lucity.com

remove

add

Cancel

OK

- Use the “Property To Update” dropdown to select the field you want to update a value on.
 - Hint: You can type in the field to search for a specific property’s display name or its database field name.

Searching by database field name

Global Edits: Fleet Inventory

Property To Update: Value To Update With: Apply Null Value: ☐

Display Name	Field Name
Alternate Zone	FL_AZONE_CD
Asset Class	FL_ACL_CD
Asset Number	FL_ASSET
Axle 1	FL_AXL1_CD
Axle 2	FL_AXL2_CD
Axle 3	FL_AXL3_CD

Current Filter

Emails to notify on completion.

- After you have selected a field, the “Value To Update With” column becomes editable. This column changes its format depending on the field component type you have selected to edit. (Example: String, Numeric, Code/Type, Date, component types will have different looking formats). This is where you will enter the value that you want to update all records with.

Property To Update **Value To Update With** **Apply Null Value**

Date component type

Code / Type component types

String component type

Numeric component type

- You can also choose to apply a null (blank) value to the selected field. To do this, check the “Apply Null Value” box.

Apply Null Value



- Once you have the “Value To Update With” defined, you will then need to select whether this Global Edit will apply to the records you had selected in the grid, or to the current filter of records you had displayed.

Records To Apply Changes To

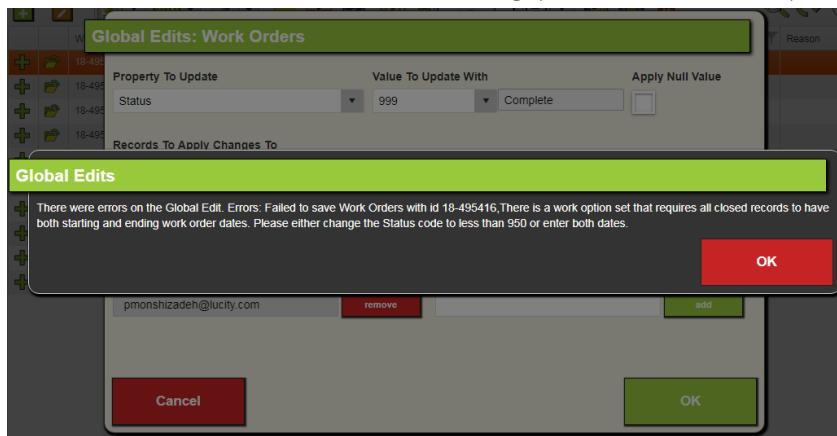
☐ Selected Record(s)
 ☒ Current Filter

- The “Update Behavior” flag is the next item in the Global Edits dialog that requires user attention.

Update Behavior

☒ Perform Validations, Calculations, and Behaviors

- When the flag is *checked*:
 - The system is protected from invalid data, but it does take more time to process the global edit. For example, if the Work Option is turned on that prevents a Work Order status from being set to “Closed” without an End Date entered on the Work Order, having the “Update Behavior” flag checked in Global Edits will catch when a Work Order record being updated is in error. See example below:



- When this checkbox set to True, it also updates related GIS features based on the geodatabase configuration.
- When this checkbox is set to True, it updates calculated fields.
- There are many fields that can be globally edited but must have this flag set to True. Therefore, the checkbox displays as read-only when those fields are selected to be updated. These fields do not support running direct SQL updates and must be validated first.

- “Update Behavior” will be defaulted to True and read-only if there are 10 or less records selected or there are 10 or less records in the current filter to be edited.
- Special GIS scenarios:
 - Example of editing a GIS-specific field: Sewer Pipe Diameter (Dia/Height)
 - i. If “Update Behavior” is unchecked, then “Update GIS” checkbox displays and defaults to True.
 - ii. If “Update Behavior” is checked, then GIS is updated automatically.

Global Edits: Pipe Inventory

Property To Update: Dia/Height (in) Value To Update With: Apply Null Value: ☐

Records To Apply Changes To:
☒ Selected Record(s) ☐ Current Filter

Update Behavior:
☐ Perform Validations, Calculations, and Behaviors ☒ Update GIS

Emails to notify on completion.
 pmonshizadeh@lucity.com remove add

Cancel OK

- Emails to notify on completion:
 - i. The user’s email address is entered by default. Other emails can be added or removed if they need to be notified when a global edit is performed.
- Running the global edit:
 - i. After all information is entered in the Global Edit screen, select “OK” to run the edit.

New System Settings for Global Edits

Setting Description	Setting Value	Setting Category
Maximum number of records which may be updated using global edit using the Business Rules option	1000	General
Maximum number of records which may be updated using global edit using the Direct SQL option	100000	General
Send an email to the system health email if a global update exceeds this row count	500	General

- Maximum number of records which may be updated using global edit using the Business Rules option:
 - This setting is where you specify how many records can be selected or be in a filter when running a global edit with the “Update Behavior” box checked.
- Maximum number of records which may be updated using global edit using the Direct SQL option:
 - This setting is where you specify how many records can be selected or be in a filter when running a global edit with the “Update Behavior” box unchecked.
- Send an email to the system health email if a global update exceeds this row count:
 - If a global edit is performed on more records than is established in this setting, then emails will be sent out to the email addresses listed in the System Health Email system setting.

New Work Management Features - Part 2

Asset Class Features

The Asset Class Library and System Assembly Component modules were developed to allow for individual assets to display their own specific forms, while at the same time, grant each asset the ability to have its own hierarchical maintenance structure defined for it on Work Order tasks.

- Take fleet vehicles for example. A large Class 8 truck will have different data that needs to be displayed on the inventory and inspection forms compared to a midsize sedan. Each of these fleet vehicles can now have their own specific forms display thanks to Asset Class Library. In addition, System Assembly Component allows each of these types of fleet vehicles to have unique maintenance structures defined for them. When the asset has a Work Order created against it, these maintenance structures are visible on the tasks within the work order itself. This allows the user to quickly define what part of the asset is being repaired or serviced.
- To better understand these concepts, we’ll break down how to set up Asset Class Library and System Assembly Component records, and then we’ll see how these two modules work together.

Asset Specific forms (Inventory & Inspection)

Note: *Asset Class-specific forms are not yet supported in Lucy Mobile but will be in a future release.*

Commented [NS5]: Somewhere in here we should discuss that asset class specific forms are not supported in Lucy Mobile yet but will be in a future release.

- Before getting into the Asset Class Library module, we first want to set up asset-specific Inventory and Inspection forms in Lucy Admin to demonstrate with. For this example, we'll set up forms for "Class 8 truck" fleet assets:
 - Inventory Form:

View/Form Manager

STEP 1: Select Program: Fleet

STEP 2: Select Module: Fleet

STEP 3: Select Module Component: Fleet

7 Views/Forms

Name	Type	Enabled	Is Default View	Assigned To Gr...	Assigned To Me...	Public FormID	Alt. Menu Name
Class 8 Truck Inventory Form	Form	True		NOT ASSIGNED	NOT ASSIGNED		
Fleet Test View	View	True					
Fleet_Invento							
Fleet_Invento							
Mview							
Roy's Fleet							
Roy's Fleet F							

Form Editor - Class 8 Truck Inventory Form

Form ID*: Fleet ID Text

Operating Status: 951 Out of Service

Manufacturer: [Field]

Class: [Field]

Model: [Field]

Fleet Rec #: [Field]

Class 8 Inventory

Work Employee: [Field]

Operator: [Field]

Operator Email: [Field]

Department: [Field]

Year: [Field]

Color: [Field]

Plate: [Field]

Fuel Type: [Field]

Fuel Tank Size: [Field]

Oil Type: [Field]

- Inspection Form:

View/Form Manager

STEP 1: Select Program: Fleet

STEP 2: Select Module: Fleet

STEP 3: Select Module Component: Fleet Inspections

7 Views/Forms

Name	Type	Enabled	Is Default View	Assigned To Gr...	Assigned To Me...	Public FormID	Alt. Menu Name
Class 8 Fleet Inspection Form	Form	True		In Group	NOT ASSIGNED		
Fleet_Inspection Form	Form	True		In Group	NOT ASSIGNED		
Fleet_Inspection Form HTML	Form	True		In Group	NOT ASSIGNED		
Fleet_Inspection View	View	True	Yes	In Group	NOT ASSIGNED		
Fleet_Inspection V							
Fleet_Inspection							
Fleet_Inspection F							

Form Editor - Class 8 Fleet Inspection Form

Fleet ID*: [Field]

Inspection Date*: [Field]

Start Time: [Field]

End Time: [Field]

Driver's Name: [Field]

Current Odometer: [Field]

Current Other Meter: [Field]

Current Hourmeter: [Field]

Most Recent Inspect: [Field]

Class 8 Inspection

Power Steering: [Field]

Water Pump: [Field]

Alternator: [Field]

Air Compressor: [Field]

Gear Selector: [Field]

Air Buzzer Warning: [Field]

Oil Pressure Gauge: [Field]

Voltage Meter: [Field]

Air Brake Check: [Field]

L.A.B.: [Field]

Mirrors/Windshield: [Field]

Wipers: [Field]

Lighting Indicator: [Field]

Horns: [Field]

Heater/Defroster: [Field]

Safety Equipment: [Field]

- With the asset class-specific inventory and inspection forms created, we now need to inform the Fleet views that there are asset class-specific forms present. By checking the “Open Asset Class Specific Form” checkbox, we are telling the views that they should open the asset class-specific form whenever possible. For this example, we will set the checkbox in both the Fleet Inventory and Fleet Inspection views.

View Builder

View Name Fleet_Inspection View

Alternate View Name

Step 1: Select a Grid Type

- ☒ Fleet Inspections
 - ☒ Equipment Comment Grid
 - ☐ Work Orders
 - ☐ Work Requests

Step 2: Select a Grid

Fleet_Inspection Grid

New Grid Edit Grid

Step 3: Select a Form for Grid (optional)

Fleet_Inspection Form

New Form Edit Form Preview

☒ Open Asset Class Specific Form

Help
Mouse over a control to see its description.

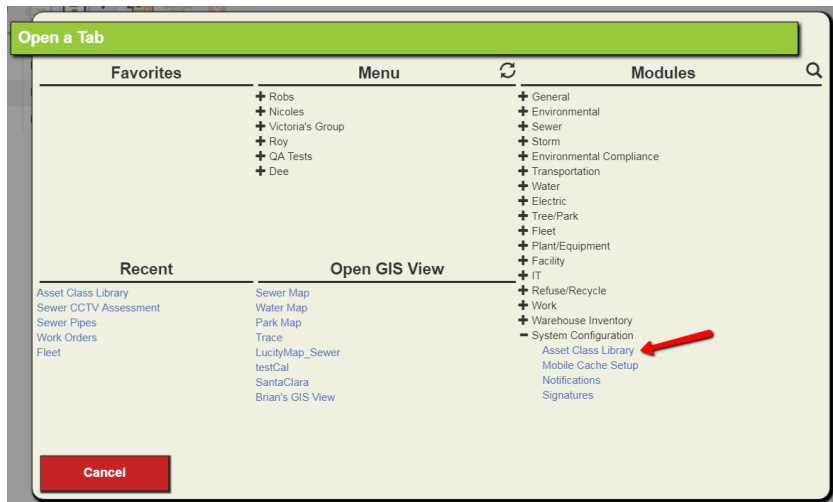
☐ Offline Mobile

☒ This is the default view for the Fleet Inspections

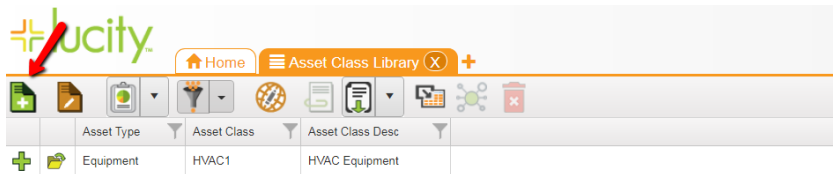
Save Cancel

Notes: _____

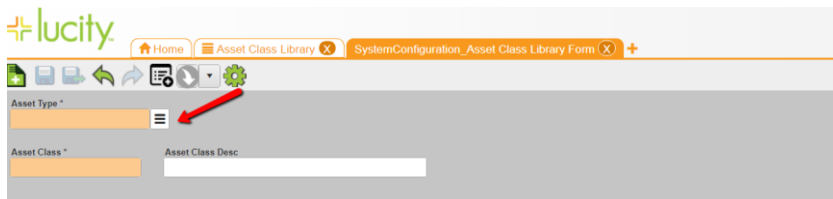
- With the asset-specific forms created and the views set up to be able to recognize them, it's time to go over to the Asset Class Library module and create the Asset Class record for our Class 8 Truck fleet vehicles.



- Add a new Asset Class Library record.



- Select the Asset Type (Example: Fleet) and define the Asset Class code & description.



Asset Type *

Asset Type

Equipment

Fleet

General Custom

Raw Water Control Valve

Raw Water Pump

Raw Water Pump Station

Raw Water System Valves

Raw Water Vault

Recycled Control Valve

Recycled Pump

Recycled Pump Station

Cancel Select

lucity

Home Asset Class Library SystemConfiguration_Asset Class Library Form

Asset Type *

32

Asset Class *

CLS8

Asset Class Desc

Class 8 Truck

- With the Asset Class Library record created, we now want to define the forms that are specific to this asset class. Expand the "Forms" child grid and add a new record.

lucity

Home Asset Class Library

Asset Type Asset Class Asset Class Desc

Fleet CLS8 Class 8 Truck

Forms (0) System Assembly Component (0)

Module Short Description Form Name

- Select the module that you want to define a specific asset class form for. You will be given a list of all available modules within the asset type. So, in this example, we see all the modules that fall under the Fleet asset type. We will select the Fleet Inventory module to define an Asset Class specific form for.

The screenshot shows the 'Module Name' selection dialog in the Lucy system. The dialog has a title bar 'Module Name *' and a list of modules. A red arrow points to 'Fleet Inventory' in the list. The list includes the following modules and their descriptions:

Module Name	Module Description
Component Warranties	Fleet Component Warranties
Components	Fleet Components
Costs	Fleet Costs
Fleet Fuelings	Fleet Fuelings
Fleet Inspections	Fleet Inspections
Fleet Inventory	Fleet
Hour Rollbacks	Fleet Hour Meter Rollbacks
Insurance Costs	Fleet Insurance Costs
Odometer Rollbacks	Fleet Odometer Rollbacks
Other Fueling Fluids	Fleet Other Fueling Fluids
OtherMeter Rollbacks	Fleet Other Meter Rollbacks

At the bottom of the dialog are 'Cancel' and 'Select' buttons.

- After selecting the Fleet Inventory module, we now will select the specific Fleet Inventory form we want to assign to the Class 8 Truck asset class. We will select the form that we created in Lucy Admin at the beginning.

NOTE: You can only define a single form, per module, per asset class.
(i.e. only one fleet inventory form for our Class 8 Truck asset class)

The screenshot shows the 'Form Name' selection dialog in the Lucy system. The dialog has a title bar 'Form Name *' and a list of forms. A red arrow points to 'Class 8 Truck Inventory Form' in the list. The list includes the following forms:

Form Name
Class 8 Truck Inventory Form
Fleet_Inventory Form
Roys Fleet Form

At the bottom of the dialog are 'Cancel' and 'Select' buttons.

- Here are both the Inventory and Inspection forms defined for the Class 8 Truck asset class record.

The screenshot shows the Lucy Asset Class Library interface. The top navigation bar includes 'Home' and 'Asset Class Library'. Below the navigation bar, there are tabs for 'Fleet' and 'System Assembly Component'. The 'Fleet' tab is active, showing a table with columns for 'Module Short Description' and 'Form Name'. The table contains two rows: 'Fleet Inspections' with 'Class 8 Fleet Inspection Form' and 'Fleet Inventory' with 'Class 8 Truck Inventory Form'.

Module Short Description	Form Name
Fleet Inspections	Class 8 Fleet Inspection Form
Fleet Inventory	Class 8 Truck Inventory Form

- With the Asset Class Library record outfitted with asset-specific forms, we now want to assign the Asset Class to our Class 8 Truck fleet vehicles. To do this, we'll head over to the Fleet Inventory module. I have filtered my list of fleet records to show only those that I consider to be part of the Class 8 Truck asset class.

The screenshot shows the Lucy Fleet Inventory interface. The top navigation bar includes 'Home' and 'Fleet'. Below the navigation bar, there is a table with columns for 'Fleet ID', 'Fleet ID Text', 'Operating Status Text', 'Class Text', 'Manufacturer Text', and 'Year'. The table contains three rows, all of which are highlighted in orange, indicating they are filtered results. The first row has 'Fleet ID' 0009, 'Fleet ID Text' 'Dump Truck, 5-6 yd.2 axle, Freightliner', 'Operating Status Text' 'Operational', 'Class Text' 'Heavy Equipment', 'Manufacturer Text' 'Freightliner', and 'Year' 2009. The second row has 'Fleet ID' asdf, 'Fleet ID Text' 'Dump Truck, 5-6 yd.2 axle, Freightliner', 'Operating Status Text' 'Operational', 'Class Text' 'Heavy Equipment', 'Manufacturer Text' 'Freightliner', and 'Year' 2009. The third row has 'Fleet ID' zxcv, 'Fleet ID Text' 'Dump Truck, 5-6 yd.2 axle, Freightliner', 'Operating Status Text' 'Operational', 'Class Text' 'Heavy Equipment', 'Manufacturer Text' 'Freightliner', and 'Year' 2009.

Fleet ID	Fleet ID Text	Operating Status Text	Class Text	Manufacturer Text	Year
0009	Dump Truck, 5-6 yd.2 axle, Freightliner	Operational	Heavy Equipment	Freightliner	2009
asdf	Dump Truck, 5-6 yd.2 axle, Freightliner	Operational	Heavy Equipment	Freightliner	2009
zxcv	Dump Truck, 5-6 yd.2 axle, Freightliner	Operational	Heavy Equipment	Freightliner	2009

Notes: _____

- There's a new field available to be added to inventory forms called "Asset Class." This field is where you tie the asset to the asset class.

The screenshot shows the Lucity Fleet Inventory Form. The top navigation bar includes the Lucity logo and tabs for Home, Fleet, and Fleet_Inventory Form. The form is divided into several sections. The top section contains fields for Fleet ID, Fleet ID Text, and Fleet Rec #. Below this is the Operating Status section with fields for Operating Status, Class, Manufacturer, and Model. The main section is titled "General" and contains multiple fields organized into columns. A red arrow points to the "Asset Class" field at the bottom left of the General section.

General		
Work Employee		
Operator	6513	Year
Operator Email		2009
Department		Color
Category		White
Priority		Plate
Ownership		E1343599
Profit Center		Radio Number
Asset Number		3951
WO Equip Code	0009	VIN
Asset Class		1FVACWBS18DY38611
		Title
		Capacity
		GVW
		Odometer
		Hourmeter

Notes: _____

- The list of asset classes shown in the field's lookup are those records in Asset Class Library which have the same asset type (i.e. Fleet asset classes).

Code	Type
CLS8	Class 8 Truck

Lucity

Home Fleet **Fleet Inventory Form**

1 of 3

Fleet ID #: 0009 Fleet ID Text: Dump Truck, 5-6 yd, 2 axle, Freightliner Fleet Rec #: 3

Operating Status: 1 Operational Class: HEQ Heavy Equipment

Manufacturer: 8 Freightliner Model:

General

Work Employee:

Operator: 6513 Year: 2009 Fuel Type: 2 Diesel

Operator Email: Color: White Fuel Tank Size: 0

Department: Plate: E1343599 Oil Type: 2 10W-40 (Diesel)

Category: Radio Number: 3951 Engine Oil Quantity: 0

Priority: VIN: 1FVACWBS18DY38611

Ownership: Title:

Profit Center: Capacity:

Asset Number: GVW:

WO Equip Code: 0009

Asset Class: CLS8 Class 8 Truck

☐ Odometer

☐ Hourmeter

- With the Asset Class defined for the fleet record, now the asset class-specific forms (Inventory & Inspection) for that fleet record will display instead of the default forms assigned to the Fleet Inventory and Fleet Inspection views.

The screenshot shows the 'Class 8 Truck Inventory Form' in the Lucity application. The form is divided into several sections:

- Header:** Includes 'Fleet ID *' (0009), 'Fleet ID Text' (Dump Truck, 5-6 yd, 2 axle, Freightliner), and 'Fleet Rec #' (3).
- Operating Status:** A dropdown menu showing '1 Operational'.
- Manufacturer:** A dropdown menu showing '8 Freightliner'.
- Class:** A dropdown menu showing 'HEQ Heavy Equipment'.
- Model:** A dropdown menu.
- Class 8 Inventory:** A large section containing multiple fields:
 - Work Employee:** A dropdown menu.
 - Operator:** A text field with '6513'.
 - Operator Email:** A text field.
 - Department:** A dropdown menu.
 - Category:** A dropdown menu.
 - Priority:** A dropdown menu.
 - Ownership:** A dropdown menu.
 - Profit Center:** A dropdown menu.
 - Asset Number:** A text field.
 - WO Equip Code:** A dropdown menu showing '0009'.
 - Asset Class:** A dropdown menu showing 'CLS8 Class 8 Truck'.
 - Year:** A text field with '2009'.
 - Color:** A text field with 'White'.
 - Plate:** A text field with 'E1343599'.
 - Radio Number:** A text field with '3951'.
 - VIN:** A text field with '1FVACWBS18DY38611'.
 - Title:** A text field.
 - Capacity:** A text field.
 - GVW:** A text field.
 - Fuel Type:** A dropdown menu showing '2 Diesel'.
 - Fuel Tank Size:** A text field with '0'.
 - Oil Type:** A dropdown menu showing '2 10W-40 (Diesel)'.
 - Engine Oil Quantity:** A text field with '0'.
 - Odometer:** A checkbox.
 - Hourmeter:** A checkbox.

System Assembly Component

The purpose behind System Assembly Component (SAC) is to allow for a detailed hierarchical structure to be defined for an asset's mechanical makeup. This hierarchy can help define what specific part of an asset is being worked on when a Work Order is made against the asset. Take the Class 8 Truck from the Asset Class Library example; there are many systems that make up a fleet asset like a Class 8 Truck, such as the engine, brake, and drivetrain systems. Each of these systems can be defined by their internal assemblies (i.e. front brakes), and from there, components within these assembly can describe the exact part that is being repaired or serviced (i.e. brake drums) on the asset.

Commented [NS6]: Somewhere we should mention that mobile supports SAC, but mobile offline does not support it yet.

- a. Since we have an Asset Class Library record already created for Class 8 Trucks, let's create some System Assembly Component (SAC) values to tie into this same asset class. To begin, we'll open the System Assembly Component (SAC) module.



- b. Next, we'll add a new System Assembly Component (SAC) record

System	System Text	Assembly	Assembly Text	Component	Component Text
TRACSYS	Traction Control System	CU	Control Unit	ECU	Electronic Control Unit
TRACSYS	Traction Control System	FRW	Front Right Wheel	WIR	Sensor Wiring
TRACSYS	Traction Control System	FRW	Front Right Wheel	WSS	Wheel Speed Sensor
ENGYSYS	QQ_Engine	ENGVLV	Valve train	VLVSPG	Valve Spring
ENGYSYS	QQ_Engine System	BPV	QQ BPV System	BPVSP	QQ BPV Catch Pan

- c. The first thing to do when creating a new SAC record is to define the System for the record. In this case, a System that fits our Class 8 Truck example doesn't exist yet, so we'll need to create one.

The 'Work System Assembly Component Form' window shows fields for System, Assembly, and Component. A red arrow points to the 'System' dropdown menu, which is currently empty. The 'Assembly' and 'Component' fields also have dropdown menus.

- d. To create a new System, we'll go into the System field lookup and select "Edit List." Then, click "Add New".

The screenshot shows a dialog box titled "System *". It has a search bar and a table with two columns: "Code" and "Type". The table contains the following data:

Code	Type
COOLSYS	Cooling System
ENG SYS	QQ_Engine
HYDBRK	Hydraulic Brake System
TRACSYS	Traction Control System

Below the table, there is a text input field with the placeholder "Select from existing or...". To the right of this field is a button labeled "...add a new system". At the bottom of the dialog, there are buttons for "Cancel", "Edit List", and "Select". A red arrow points from the text "Select from existing or..." to the text input field. Another red arrow points from the text "...add a new system" to the "...add a new system" button.

The second screenshot shows a similar dialog box, but with a red arrow pointing to the "Add New" button at the bottom. Other buttons visible include "Cancel", "Edit Selected", "Delete Selected", "Exit Editing", and "Select".

- e. You can easily add multiple new system values to the list by checking the "Keep add dialog open".

The screenshot shows a dialog box titled "Add New Item". It has two input fields: "Code" and "Type". The "Code" field contains the text "AIRBRK" and the "Type" field contains the text "Compressed Air Brake System". Below these fields is a checkbox labeled "Keep add dialog open" which is checked. At the bottom of the dialog, there are buttons for "Close" and "Add". A red arrow points from the text "Allows adding multiple systems to list at once" to the "Keep add dialog open" checkbox.

- f. With the new system added to the list, I can now choose that value from the list of Systems. Now it's time to select Assembly and Component values. If the values you need don't already exist, you can create them in the same way we created new System values above.

The screenshot shows the 'Work System Assembly Component Form' in the Lucity application. The form has three dropdown menus: 'System *', 'Assembly *', and 'Component *'. The 'System *' dropdown is set to 'AIRBRK Compressed Air Brake System'. The 'Assembly *' dropdown is set to 'FRFNDI Front Foundation Brake'. The 'Component *' dropdown is set to 'AIRBRK Air Brake Chamber'. Red arrows point to the dropdown menus for Assembly and Component.

- g. We can rapidly create more System Assembly Component records that fall within the same System, or System and Assembly, by turning on the form's Carry Over button. With Carry Over enabled, we can select the fields values that we want to keep when adding a new record.

The screenshot shows the 'Work System Assembly Component Form' with the 'Carry Over' button enabled, indicated by a red box and a red arrow. The 'System *' dropdown is set to 'AIRBRK Compressed Air Brake System'. The 'Assembly *' dropdown is set to 'FRFNDI Front Foundation Brake'. The 'Component *' dropdown is set to 'AIRBRK Air Brake Chamber'. A red arrow points to the 'Carry Over' button.

- h. With the fields we want to carry over to the new SAC record selected, click the "Save and Add" button. This will save our current record and create a new SAC record all in one action.

The screenshot shows the 'Work System Assembly Component Form' with the 'Save and Add' button highlighted by a red box and a red arrow. The 'System *' dropdown is set to 'AIRBRK Compressed Air Brake System'. The 'Assembly *' dropdown is set to 'FRFNDI Front Foundation Brake'. The 'Component *' dropdown is set to 'AIRBRK Air Brake Chamber'. A red arrow points to the 'Save and Add' button.

- i. With the new SAC record created, we see that we only need to select a Component that falls within the System and Assembly. When you've finished adding SAC records that fall under the same System or System/Assembly combination, click the "Save and Close" button to stop adding records.

The screenshot shows the 'Work System Assembly Component' form in the Lucity application. The form has three main sections: 'System *', 'Assembly *', and 'Component *'. The 'System *' section contains 'AIRBRK Compressed Air Brake System'. The 'Assembly *' section contains 'FRFNDI Front Foundation Brake'. The 'Component *' section contains 'BRKDR Brake Drum'. A red arrow points to the 'Save and Close' button in the top right corner of the form.

- j. Now that we have some System Assembly Component records created, we need to link them up with an Asset Class Library record. To do this, we will open the Asset Class Library module. Then, we will expand our Class 8 Truck record, so we can see the System Assembly Component child grid.

The screenshot shows the 'Asset Class Library' module in the Lucity application. The main table lists asset classes: 'Raw Water Pump' (1234), 'Raw Water Control Valve' (1234), and 'Fleet' (CLS8). The 'Fleet' record is expanded, showing a child grid. A yellow arrow points to the 'Class 8 Truck' record in the main table. A red arrow points to the 'System' column header in the child grid.

Asset Type	Asset Class	Asset Class Desc
Raw Water Pump	1234	
Raw Water Control Valve	1234	
Fleet	CLS8	Class 8 Truck

System	System Text	Assembly	Assembly Text	Component	Component Text
--------	-------------	----------	---------------	-----------	----------------

Notes: _____

- | Pick Item(s) to Attach | | | | | |
|------------------------|-----------------------------|---------------|-------------------------|----------------|--------------------|
| System Code | System Type | Assembly Code | Assembly Type | Component Code | Component Type |
| AIRBRK | Compressed Air Brake System | AIRBRKVLV | Air Brake Valves | SAFEVLV | Safety Valve |
| AIRBRK | Compressed Air Brake System | AIRBRKVLV | Air Brake Valves | FOOTVLV | Foot Valve |
| AIRBRK | Compressed Air Brake System | AIRBRKMISC | Air Brake Miscellaneous | FOOTVLV | Foot Valve |
| AIRBRK | Compressed Air Brake System | AIRBRKMISC | Air Brake Miscellaneous | RESVOIR | Reservoir |
| AIRBRK | Compressed Air Brake System | AIRBRKMISC | Air Brake Miscellaneous | GOVERNOR | Governor |
| AIRBRK | Compressed Air Brake System | AIRBRKLIN | Air Brake Lines | SUPPLINE | Supply Line |
| AIRBRK | Compressed Air Brake System | AIRBRKLIN | Air Brake Lines | RREDELIVLN | Rear Delivery Line |

- I. With our System Assembly Component records linked to our Class 8 Truck asset class library record, we can now look at how this affects Work Order Tasks when a Work Order is made against a Fleet vehicle that has an asset class of Class 8 Truck. To demonstrate this, I'll create a Work Order from a Class 8 Truck fleet record.

The top screenshot shows the Lucy mobile application interface. The 'Fleet' tab is selected, and a table of assets is displayed. A red arrow points to the 'Fleet' tab. The table has the following data:

Fleet ID	Fleet ID Text	Operating Status Text	Class Text	Manufacturer Text	Yr
0009	Dump Truck, 5-6 yd,2 axle, Freightliner	Operational	Heavy Equipment	Freightliner	20
asdf	Dump Truck, 5-6 yd,2 axle, Freightliner	Operational	Heavy Equipment	Freightliner	20
zxcv	Dump Truck, 5-6 yd,2 axle, Freightliner	Operational	Heavy Equipment	Freightliner	20

The bottom screenshot shows the Lucy mobile application interface. The 'Work Order' tab is selected, and a table of tasks is displayed. A red arrow points to the 'Add' button (a green plus icon) in the task list. The table has the following data:

Seq No	Task	Task Text	Task Start Date	Task End Date	Status Text	Unit of Measure Text	Calc'd Unit Cost	# of Units
1	FLT722	Brakes						0

- m. Once the Work Order is created, we'll need to add a Sub Task to it. On the Sub Task form, we will see that there are System, Assembly, and Component fields. The values that show in these fields are the determined by the System Assembly Component records that are tied to the work order asset's Asset Class. For this example, we will see the System Assembly Component values that are tied to the Class 8 Truck asset class.

Note 1: If there is no asset on the Work Order, or if there is more than one asset on the work order, or if the asset on the work order doesn't have an asset class defined, then all Asset Class Library-linked System Assembly Component values will be displayed here.

Note 2: The System Assembly Component fields are supported in Lucy Mobile, but not supported in Offline Mobile yet.

Notes: _____

The screenshot shows the 'Work Order Tasks Form' in the Lucity application. The 'Task' is 'FLT22 Brakes'. The 'System', 'Assembly', and 'Component' fields are currently empty. Red boxes numbered 1, 2, and 3 with arrows point to these fields respectively, indicating the required sequence for completion.

These fields must be filled out in order:

1. System
2. Assembly
3. Component

- n. With the System Assembly Component fields filled out on the task, the otherwise-generic “Brakes” Sub Task now has a specific repair focus: The brake drums on the front foundation brake assembly. Having SAC values established like this will save you from having to set up tasks that are repair-specific.

The screenshot shows the 'Work Order Tasks Form' with the 'System', 'Assembly', and 'Component' fields filled out. The 'System' field is 'AIRBRK Compressed Air Brake Sys', the 'Assembly' field is 'FRFND BRK Front Foundation Brake', and the 'Component' field is 'BRKDRUM Brake Drum'. The 'Task' is still 'FLT22 Brakes'.

- o. The System Assembly Component fields on the Work Order sub task can have filters and reports ran against them, helping you determine the frequency of repairs on specific parts of an asset.