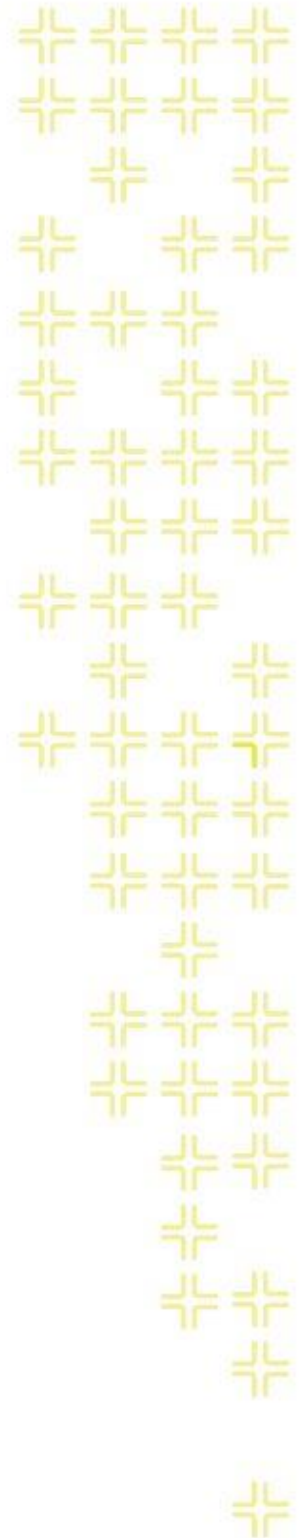




TRAINING GUIDE

Work Orders and Requests



Creating 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 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.

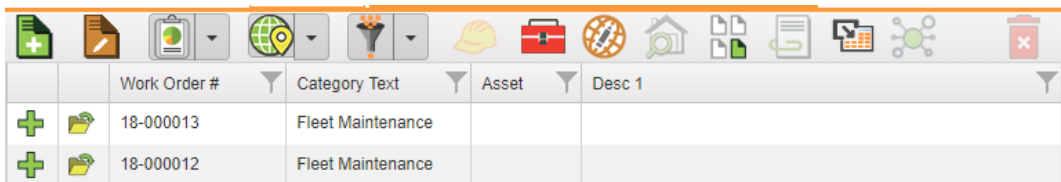
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Creating a Work Order in the Web

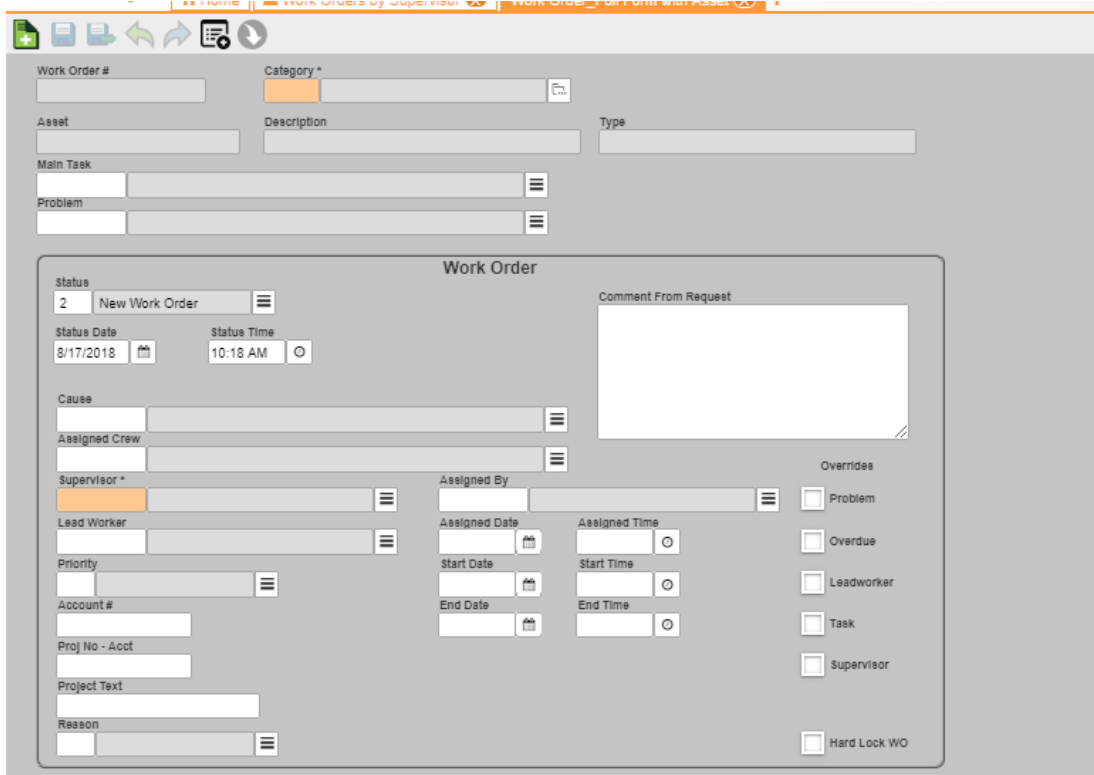
The Lucy Web interface allows you to create work orders through a completely customized web interface on a browser from a computer without having Lucy Desktop software installed. The interface of the dashboard you see when you log in, the grids and child records displayed for specific modules, and even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

1. Open the *Work Order* view by selecting from the menu **Modules>> Work>> Work Orders** or opening a WO plugin view from the dashboard.



	Work Order #	Category Text	Asset	Desc 1
+	18-000013	Fleet Maintenance		
+	18-000012	Fleet Maintenance		

2. Click *Add a Record* button  on the toolbar to open your default work order form.



Work Order

Status: 2 New Work Order

Status Date: 8/17/2018 Status Time: 10:18 AM

Cause: [Text Field]

Assigned Crew: [Text Field]

Supervisor*: [Text Field]

Lead Worker: [Text Field]

Priority: [Text Field]

Account #: [Text Field]

Proj No - Acct: [Text Field]

Project Text: [Text Field]

Reason: [Text Field]

Assigned By: [Text Field]

Assigned Date: [Text Field] Assigned Time: [Text Field]

Start Date: [Text Field] Start Time: [Text Field]

End Date: [Text Field] End Time: [Text Field]

Overrides:

- Problem
- Overdue
- Leadworker
- Task
- Supervisor
- Hard Lock WO

Comment From Request: [Text Area]

3. The Work Order form is customized to match your workflow. We can start out by filling out:

- Category, Problem and Main Task

Work Order # [] Category * OB8000 Building []
Asset [] Description [] Type []
Main Task FACT304 Exterior Siding R/R []
Problem FACP000 Routine Maintenance []

- Supervisor, Lead Worker, Start/End Dates


Supervisor * 0109 Dave Dreiwitz []
Lead Worker 0268 Robbie Finan []
Priority 1 Immediate (few hours) []
Account # []
Assigned By []
Assigned Date 8/17/2018 [] Assigned Time []
Start Date 8/17/2018 [] Start Time []
End Date 8/17/2018 [] End Time []

- Comments


Comment From Request []

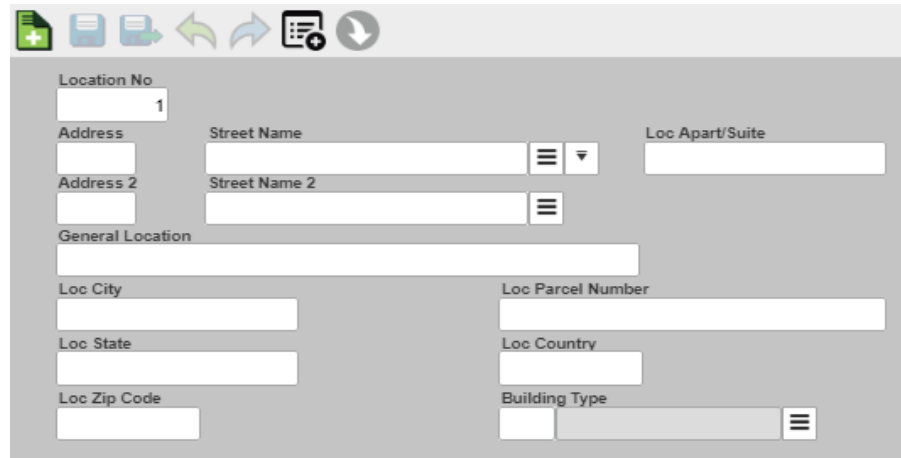
- Once all necessary information is filled in, hit save  or save and close .


Child Relationship Records

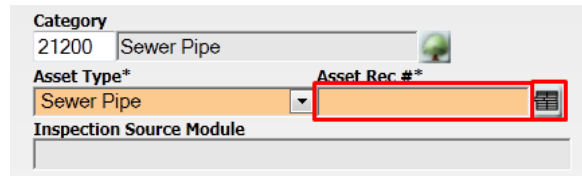
- To view or enter child records, hit the view button . This will display all available views of related records .

Location No	Address	Street Name	Address 2	Street Name 2	Loc X Coord.	Loc Y Coord.	General Location
1	3401	COLLEGE BLVD			2271907.044749	234260.630827	

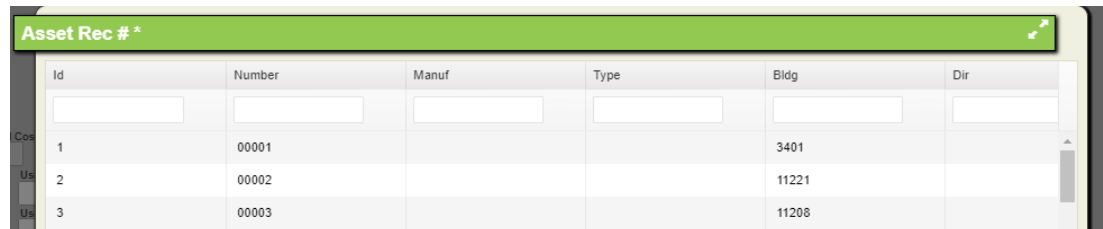
- First, let's add a location. We can add a location from the Work order under address and street or by adding a location under the location tab by using the add a record  button.



- Next, we can add an asset. While under the assets tab, click add , which opens an Asset form. From here you can select the asset type (defaulted to match your Work Order category), and then from the asset list.

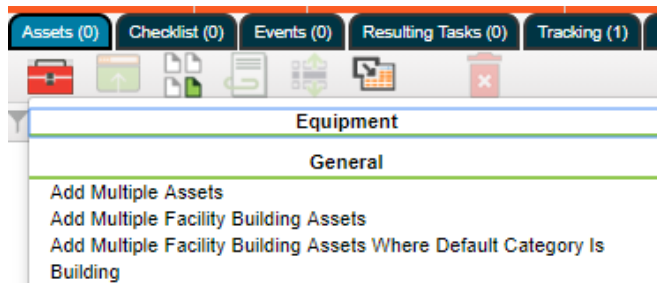


We used the filter button to find the specific pipe in the asset list.



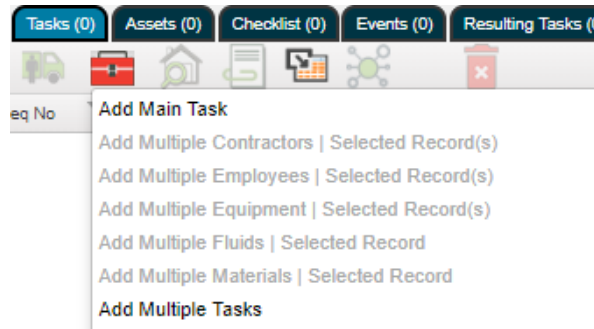
Id	Number	Manuf	Type	Bldg	Dir
1	00001			3401	
2	00002			11221	
3	00003			11208	




- You can also add assets through the Toolkit. The toolkit option allows you to add multiple assets in numerous ways:

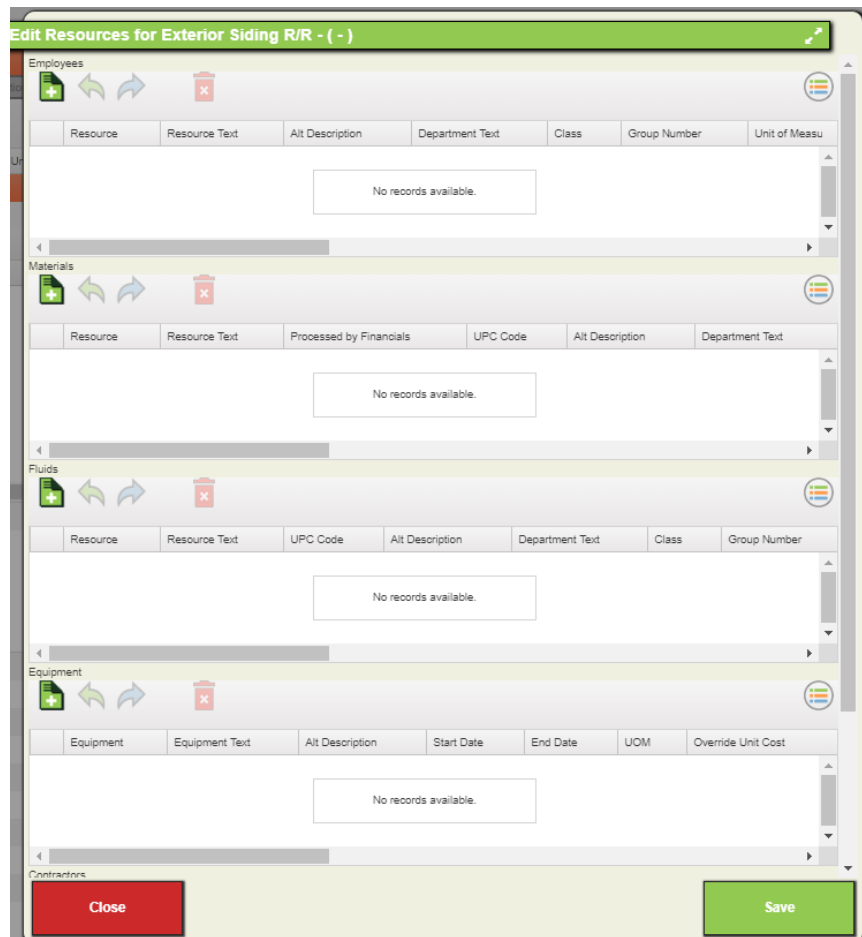


- Or you can use the subset tool  :

- 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 in the child grids under task to select tasks individually and resources individually. You can also add multiple resources using the toolkit  button. The third option We are going to use the edit resources grid  function, so that we can view and add employees, materials, equipment, etc. all at once.
- 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 can also add additional workers to this grid. 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 the work order form to view the total calculated costs. Note: Keep in mind these field may not be on your WO form.


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

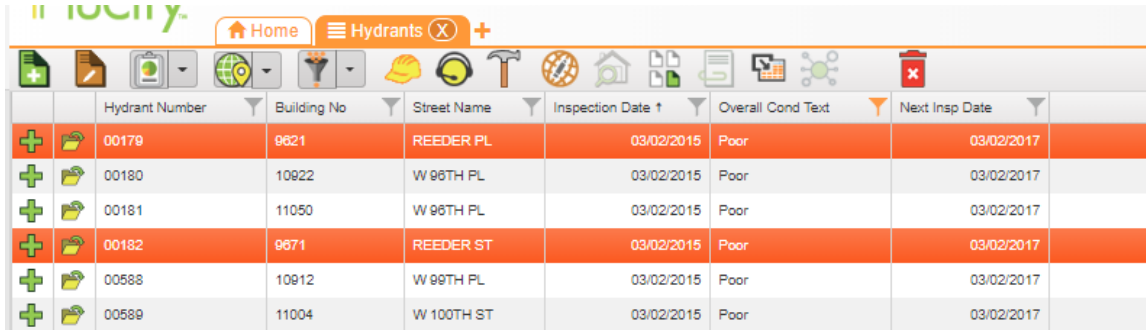
Creating a Work Order or from the Asset in the Web

- We are going to create a work order Against a Hydrant. Open the Hydrants Asset Module from a Plugin or the Menu > Water > Hydrants.

Home Hydrants X +							
	Hydrant Number	Building No	Street Name	Inspection Date	Overall Cond Text	Next Insp Date	
+ [icon]	00001	3401	COLLEGE BLVD	03/25/2015	Good	03/25/2017	
+ [icon]	00002	11221	ROE AVE	03/24/2015	Excellent	03/24/2017	
+ [icon]	00003	11208	GRANADA LN	03/25/2015	Poor	03/25/2017	
+ [icon]	00004	4800	W 115TH ST	03/25/2015	Good	03/25/2017	
+ [icon]	00005	10524	MOHAWK LN	03/19/2015	Fair	03/19/2017	
+ [icon]	00006	3400	COLLEGE BLVD	03/25/2015	Good	03/25/2017	
+ [icon]	00007	3400	COLLEGE BLVD	03/25/2015	Excellent	03/25/2017	
+ [icon]	00008	3851	COLLEGE BLVD	03/25/2015	Poor	03/25/2017	
+ [icon]	00009	11288	TOMAHAWK CREEK PKWY	03/25/2015	Good	03/25/2017	
+ [icon]	00010	11300	TOMAHAWK CREEK PKWY	03/25/2015	Good	03/25/2017	

- We may want to filter for Hydrants the are in Poor condition and create a WO for one or many of them, we can also bring in a subset using the subset  button, and then load our subset into the existing filter if we have one set up.

- Next we will use the create work order  button. If we only need to do work on some of the hydrants, we can also select specific records in the current view on top of the filter and subset we've loaded. (Hint use the CNTL key) 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. We have options for selected records or filtered as well as All on the same work order or each asset getting its own work order.



	Hydrant Number	Building No	Street Name	Inspection Date	Overall Cond Text	Next Insp Date
	00179	9621	REEDER PL	03/02/2015	Poor	03/02/2017
	00180	10922	W 98TH PL	03/02/2015	Poor	03/02/2017
	00181	11050	W 98TH PL	03/02/2015	Poor	03/02/2017
	00182	9671	REEDER ST	03/02/2015	Poor	03/02/2017
	00588	10912	W 99TH PL	03/02/2015	Poor	03/02/2017
	00589	11004	W 100TH ST	03/02/2015	Poor	03/02/2017

Select options for creating a Work Order

Create Work Order for: Selected Record(s) (2) Filtered Records

Where: ALL share a single Work Order EACH record has its own Work Order

Category Code

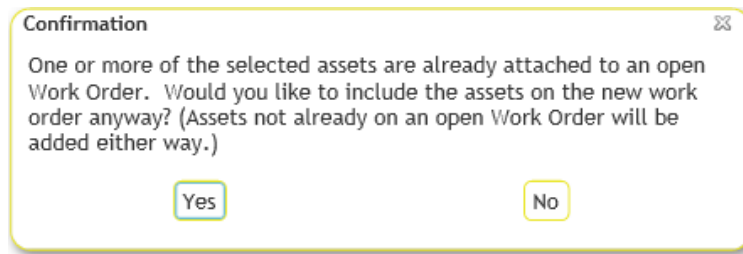
Only show Templates related to selected Category

Use this category for records without a default category
 Use this category for ALL Work Orders

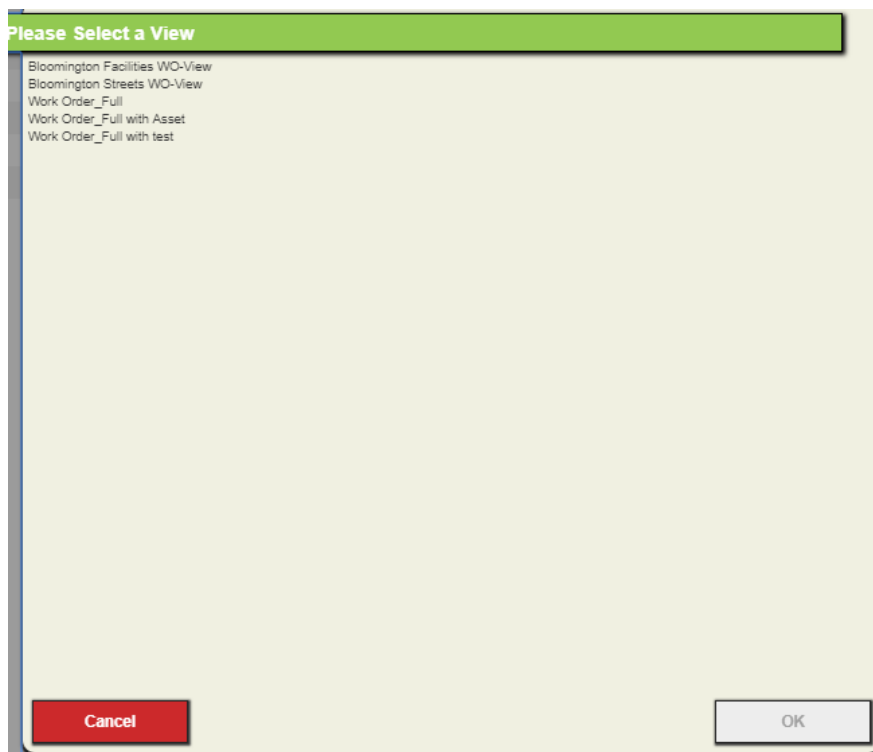
Template Code	Template Type
No Records found.	

Notes: _____

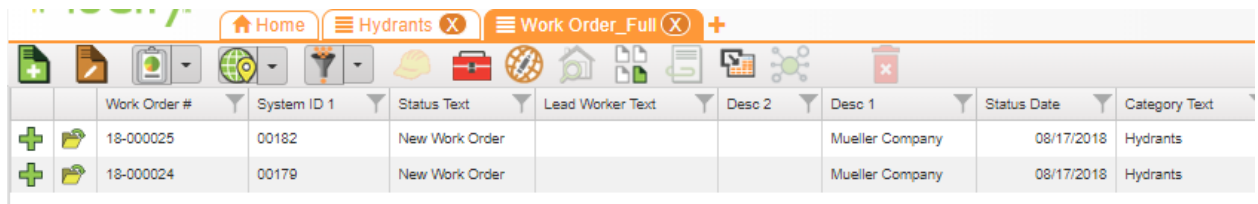
4. Once again you will be prompted if these assets are already on existing Open Work Orders.



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. Click ok and the work order will be created.



6. Once the work order(s) have been created, they will open in your selected view.





The screenshot shows a web application interface with a navigation bar at the top containing "Home", "Hydrants", and "Work Order_Full" tabs. Below the navigation bar is a toolbar with various icons. The main content area displays a table with the following data:

	Work Order #	System ID 1	Status Text	Lead Worker Text	Desc 2	Desc 1	Status Date	Category Text
	18-000025	00182	New Work Order			Mueller Company	08/17/2018	Hydrants
	18-000024	00179	New Work Order			Mueller Company	08/17/2018	Hydrants



7. Once the Work order has been created now you can fill in the important information on the WO or child grids tasks, location, etc.

Create a Work Order from the GIS Web map


1. Open the GIS Web map .
2. You can select an individual asset clicking on the asset, you can select multiple assets using the select tool in the  GIS Web map toolbar.

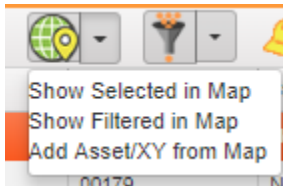


Make sure there is an orange box around any tool otherwise it is not active.

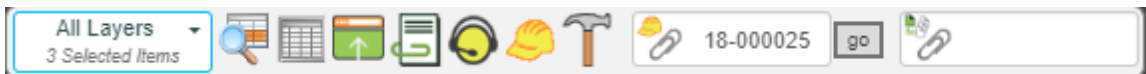
3. From the identify window, select Create Work Order . This immediately creates a work order including the selected asset, you may have to choose category, template or view depending on your options and permission.
4. You can also use the select tool  to highlight multiple assets. This opens up a toolbar, where you can select which type of selected assets(if there are multiple types). Here you have the same Create and Add to Work Order options.



5. 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.
6. From the work order itself you can use the add asset/xy from map button



7. This will carry the work order number to the map and allow you to select assets you wish to add using the select tool. When you open and select an item the WO toolbar will show up with the WO number filled in.



When you have selected the assets you want to add click "go" next to the WO number, this adds the assets to the WO. Note: Be careful to select the proper layer or it will add all layers selected to the WO.

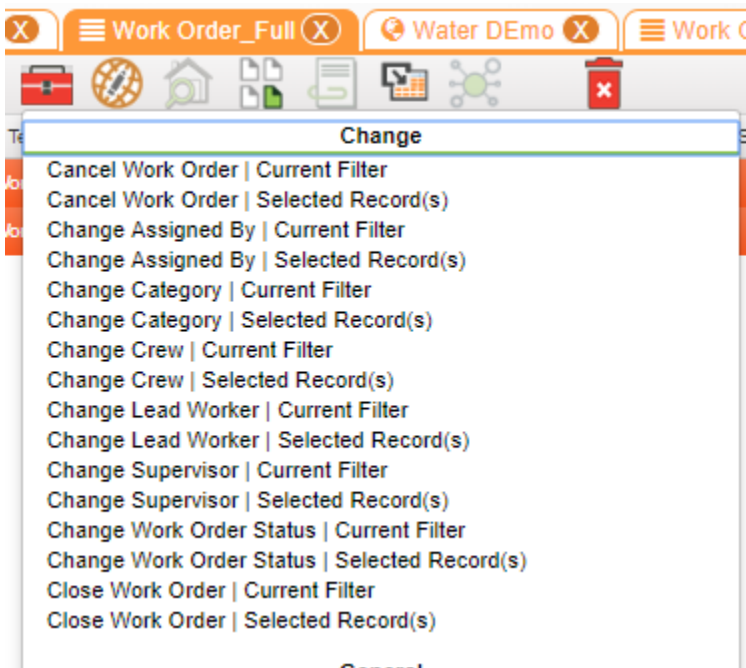
Completing the Work Order in the Web

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

The screenshot shows a web form for a work order. The fields are as follows:


Work Order #	2014-00397	Category*	21200 Sewer Pipe
Status	999 Complete	Problem	WWCPPBLK Blockage
Status Date	8/19/2014	Main Task	WWEPPFLS Pipe Flushing
Status Time	11:29 AM		

2. 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 filter set at once.



Notes: _____

Creating a Work Request in the Web

1. Open the *Work Request* module by opening a Request view or selecting **Modules>>Work>>Work Requests** from the dashboard.
2. Like 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 your default request form.
4. Here we can see all the fields that we filled out in the desktop application are condensed into a single form.

The screenshot displays a web-based form for creating a new work request. The form is organized into two main sections: **Customer** and **Request**.

Customer Section:


- Request # (input field)
- Status: 1 New Request (dropdown menu)
- Status Date: 8/17/2018 (calendar icon)
- Status Time: 02:31 PM (clock icon)
- Phone # (input field)
- Do Not Disclose (checkbox)
- Send to WO Billing (checkbox)
- Util Acct # (input field)
- Salutation (input field)
- Name (input field), M.I. (input field), Name (2) (input field), Name Suffix (input field)
- Name Type (input field)
- Business (input field)
- Req Address (input field), Req Street Name (input field)
- Apartment/Suite (input field)
- Req Address 2 (input field), Req Street Name 2 (input field)
- Req City (input field), Req State (input field)
- Req Zip Code (input field)
- Req Country (input field)
- Req Parcel Number (input field)
- Building Type (input field)
- Email (input field)
- Home Phone # (input field)
- Work Phone # (input field)
- Phone 1 (input field)
- Phone 2 (input field)
- Comment from Customers (text area)

Request Section:


- Category * (input field)
- Request to Work Order (text area)
- Problem * (input field)
- Cause (input field)
- Assigned Crew (input field)
- Priority (input field)
- Publically Available (checkbox)
- Loc Address (input field), Loc Street Name (input field)
- Loc Apart/ Suite (input field)
- Loc Street2 (input field), Loc Street2 Name (input field)
- General Location (input field)
- Loc City (input field), Loc Parcel Number (input field)
- Loc State (input field), Loc Country (input field)
- Loc Zip Code (input field), Building Type (input field)
- Supervisor (input field), City Location (input field)
- Inventory Type ID (input field), Asset Rec # (input field)
- Inventory Type (input field)
- Loc X Coord. (input field)
- Loc Y Coord. (input field)
- TB Year (input field)
- TB Coordinates (input field)
- TB Data (input field)

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

Req Address Req Street Name
1098 Wanda
Phone # S WANDA DR

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.

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

- We can use the search functionality 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.

REQUESTOR'S INFORMATION

First Name: R Last Name: Mills

Req Address Req Street Name: 1098 S WANDA DR How did request come in?*: 1 Call In Request

Phone #: Home Phone #: 682-0144




Email:

Comment from Customers: Calling in about sewage smell in front of his house.


7. Next fill in all relevant Problem Information fields.


PROBLEM INFORMATION


Inventory Type ID **Asset Rec #**
No Inventory Item


Loc Address **Loc Street Name**
1088 S WANDA DR   

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


Category **Emergency Level**
02000 Call Center 1 Immediate Priority 

Problem
 

Assigned Crew
 

Supervisor*
1 RICK HONAS 


Request to Work Order
Please investigate the address t.

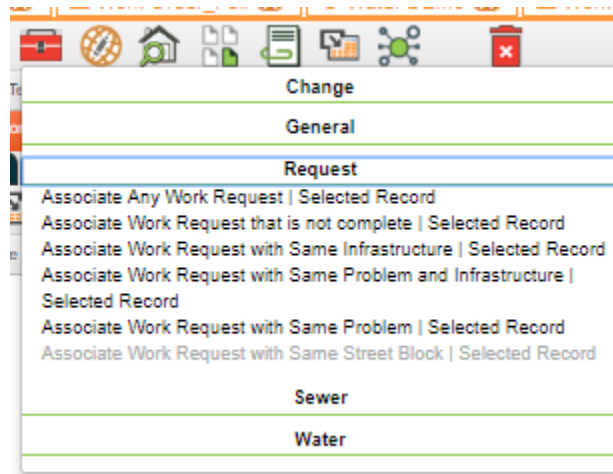
8. Save and close  this record. Notice that some fields displayed were automatically populated even without being included in the form (Status, Status Date, Request #).

Notes: _____



Creating a Work Order from a Work Request

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

1. Click the Create Work Order button  at the top of the *Requests* view after selecting a request or requests. You may need to choose the category or view you wish to create the WO for, this is dependent on your organizations settings.
2. The new work order will contain all 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".

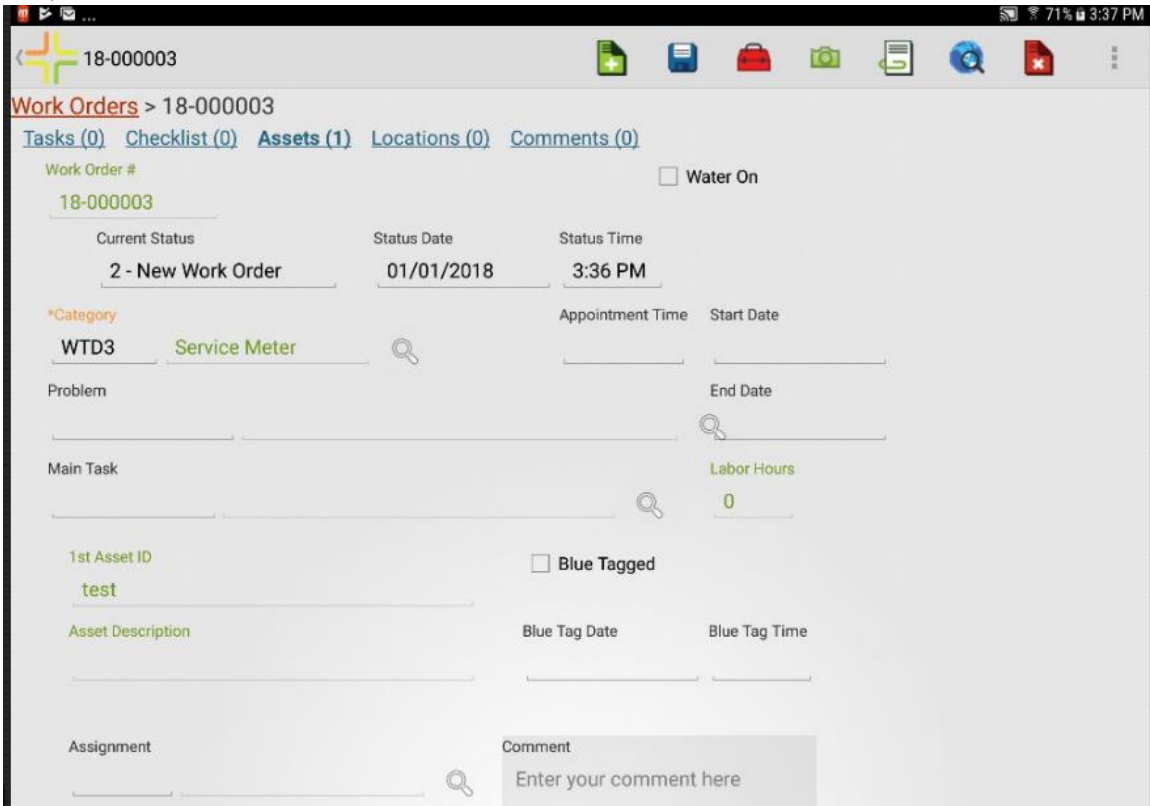
		2014-00011	WO Completed	8/20/2014	Odor Control	RICK HONAS	Call In Request	1088	S	WANDA	
-------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------	------------	--------------	-----------	--------------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

Notes: _____

Creation of a Work Order in Mobile


Work order creation in Mobile is virtually identical to web. However, depending on the type of Mobile device you use the child grids are a little different. Android and iOS Mobile also access toolkits somewhat differently. By long tapping(holding down your finger on an item) you can access toolkits and additional buttons.

1. Use the  button to create a new work order once in a work order view. This will bring up the work order form.
2. Fill in the Category, and any required fields. In mobile there is no “save and close” so just use the save icon. This will allow the child grids to be seen. Before we save none of the child grids are present.



The screenshot shows a mobile application interface for creating a work order. At the top, there's a navigation bar with a back arrow, a home icon, and the work order number '18-000003'. Below this, there's a title 'Work Orders > 18-000003' and several tabs: 'Tasks (0)', 'Checklist (0)', 'Assets (1)', 'Locations (0)', and 'Comments (0)'. The main form area contains the following fields and options:

- Work Order #:** 18-000003
- Water On:**
- Current Status:** 2 - New Work Order
- Status Date:** 01/01/2018
- Status Time:** 3:36 PM
- *Category:** WTD3 Service Meter (with a search icon)
- Appointment Time:** (empty field)
- Start Date:** (empty field)
- Problem:** (empty field)
- End Date:** (empty field with a search icon)
- Main Task:** (empty field with a search icon)
- Labor Hours:** 0
- 1st Asset ID:** test
- Blue Tagged:**
- Asset Description:** (empty field)
- Blue Tag Date:** (empty field)
- Blue Tag Time:** (empty field)
- Assignment:** (empty field with a search icon)
- Comment:** Enter your comment here (text input field)

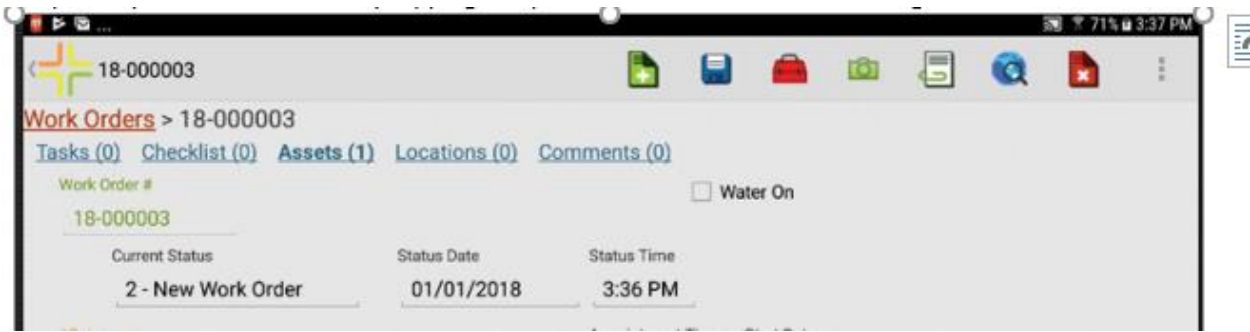
3. In mobile android we can now add the main task or any additional tasks to the WO. We can add locations or any other items in the child grids, by simply clicking the child grid name and then using the  to add a new item.

Notes: _____

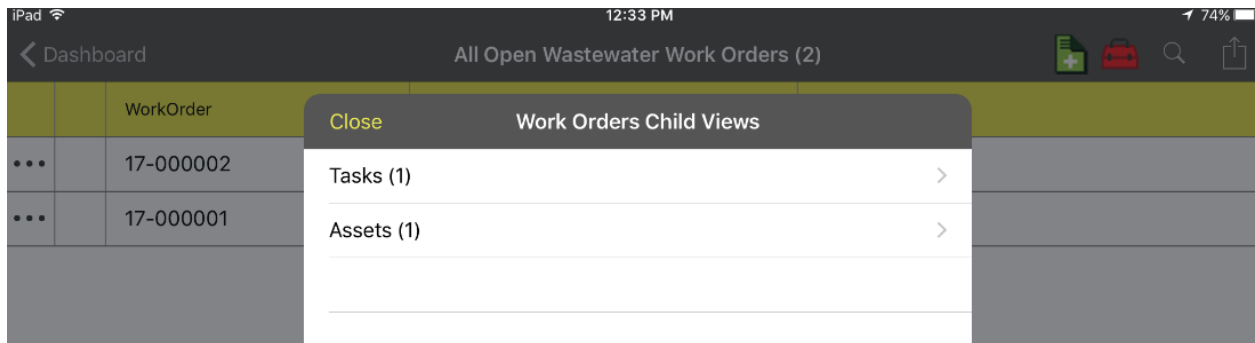
Child Grids

In mobile all the child grids available to a view are also available. Depending on your tablet operating system they will however be accessed differently. In iOS they will be available using the “...” next to the WO in Android you will need to open the work order to view the child grids.

Android after opening the work order





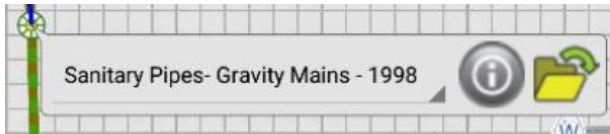
iOS Clicking the ... will open the child views.





Filling in the child grids is similar to web but there is no edit resources icon for filling in task resources. The toolkits for web are available in mobile as long as you are not in offline mode.

Creating Work Orders from the Map in Mobile


1. Open the map in Mobile by using the Map Icon
2. Tap on the  at the top of the screen this will allow you to select an asset.
3. Once an asset is selected tap the . This will bring up the attributes and additional tools

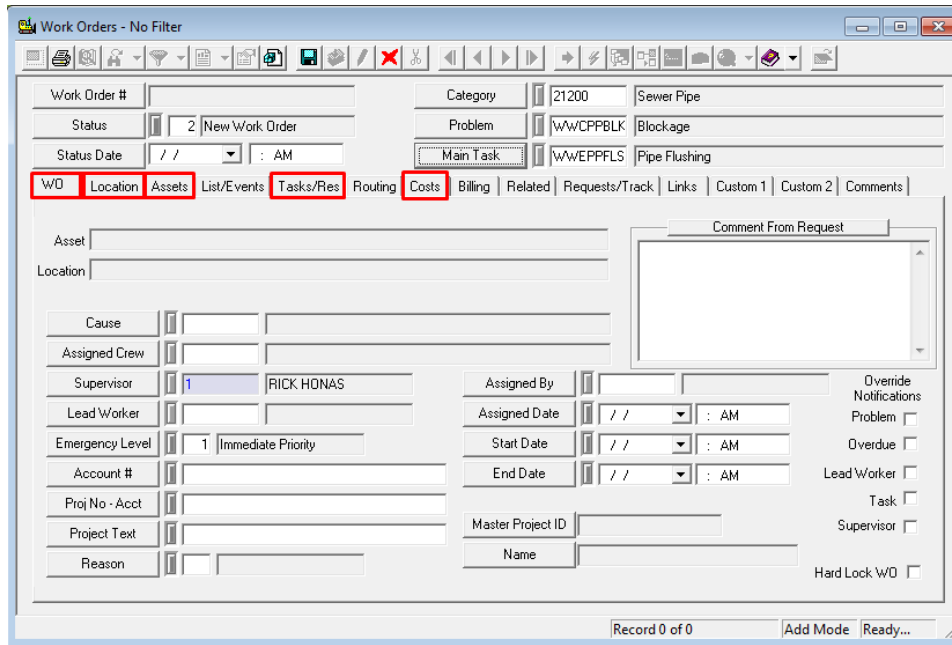


4. To create a work order, click the hard hat icon.  you could also create a request by clicking the request icon. 
5. This will open the work order form if a default category has been set for the item. If not select the category and click OK. The asset is automatically added to the work order.
6. From here fill out the work order form as you normally would using the child grids.

Creating a Work Order in the Desktop

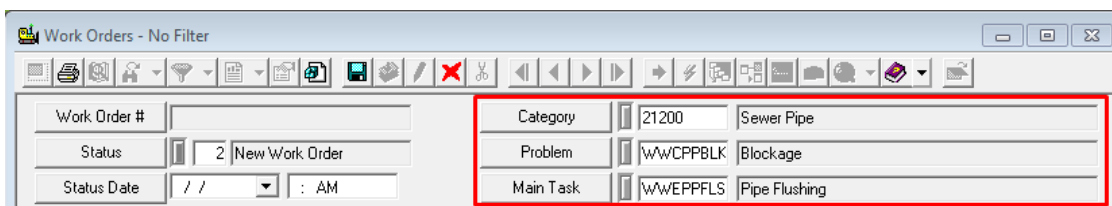
As explained above, three work order modules are available in the desktop. In this section, we'll discuss the *Standard Work Order* module, the most comprehensive of the three. To create a work order:

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.

Work Order # [] Category [21200 Sewer Pipe]
Status [] Problem [WwCPPBLK Blockage]
Status Date [/ /] : AM Main Task [WwEPPFLS Pipe Flushing]

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

Asset []
Location []

Cause []
Assigned Crew []
Supervisor [1 RICK HONAS]
Lead Worker [50802 Casey Worker]
Emergency Level [1 Immediate Priority]
Account # []
Proj No - Acct []
Project Text []
Reason []

Assigned By []
Assigned Date [/ /] : AM
Start Date [08/15/2014] : AM
End Date [08/15/2014] : AM
Master Project ID []
Name []

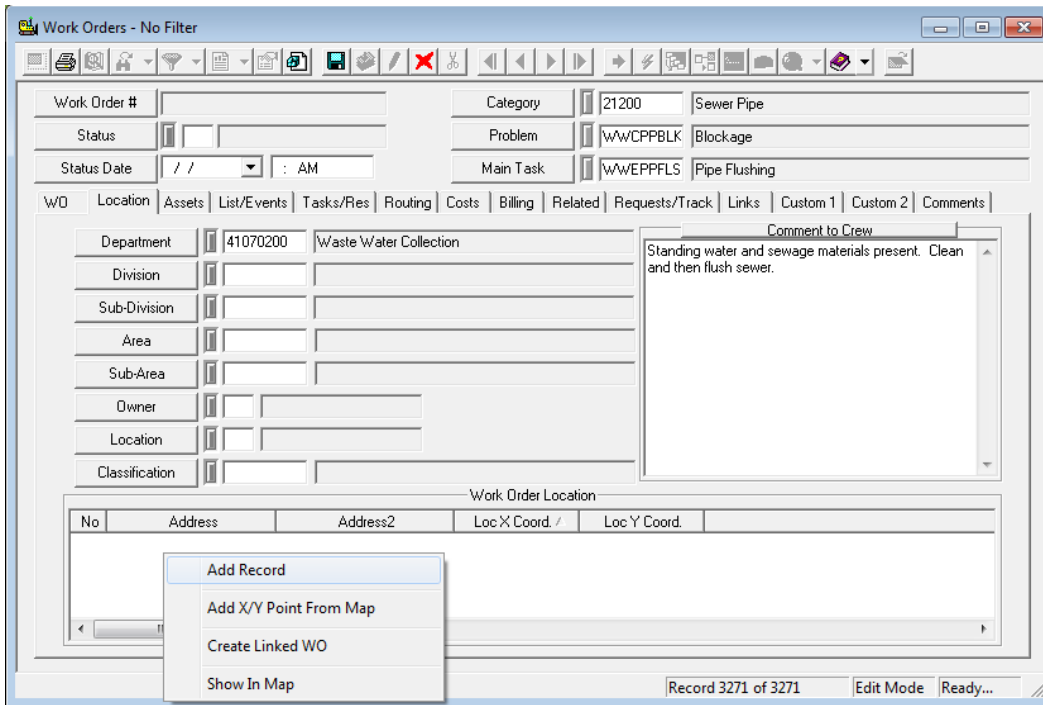
Comment From Request []

Override Notifications Problem
Overdue
Lead Worker
Task
Supervisor
Hard Lock WO

Press F9 for pop-up selection Record 3271 of 3271 Edit Mode Ready...




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.




Notes: _____

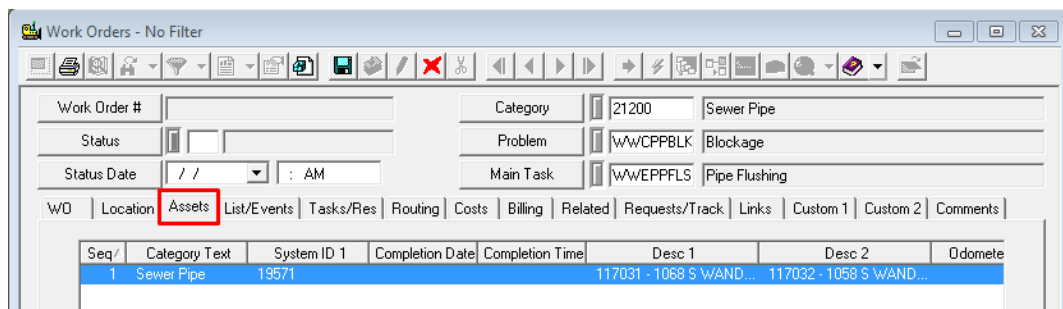
- To add a location to the grid, right click in the grid and select *Add Record*.
- A new form will open allowing you to enter one or more locations.

- 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.

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

- On the Assets form, note that the Object Type (the type of asset you can add to your work order) is dictated by the **Category** chosen in the **Header**.

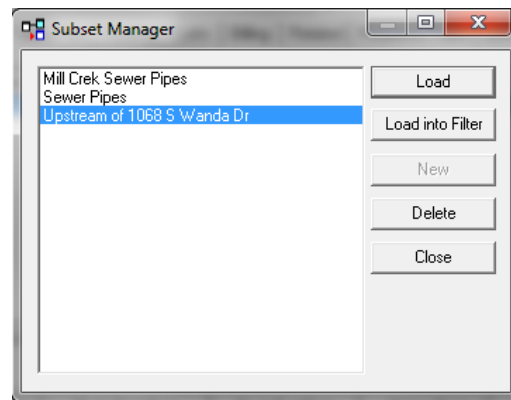
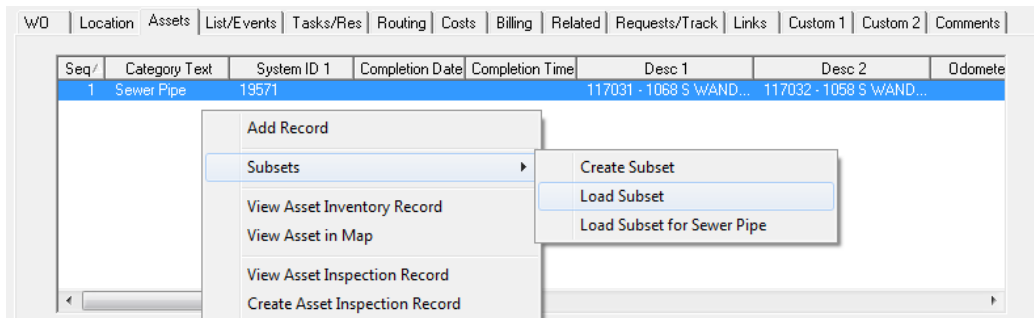
- In this example, we have selected Pipe Maintenance as the category. This allows us to include sewer pipe assets in the work order.
- You can select a different category, which allows you to add assets of different types.
- Click the **System ID 1** button. These System IDs identify our assets.
- Based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



- 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.

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- To load a subset into the Assets grid, right click in the grid and select *Subsets>>Load Subset for Sewer Pipe*. The Subset Manager will appear:



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

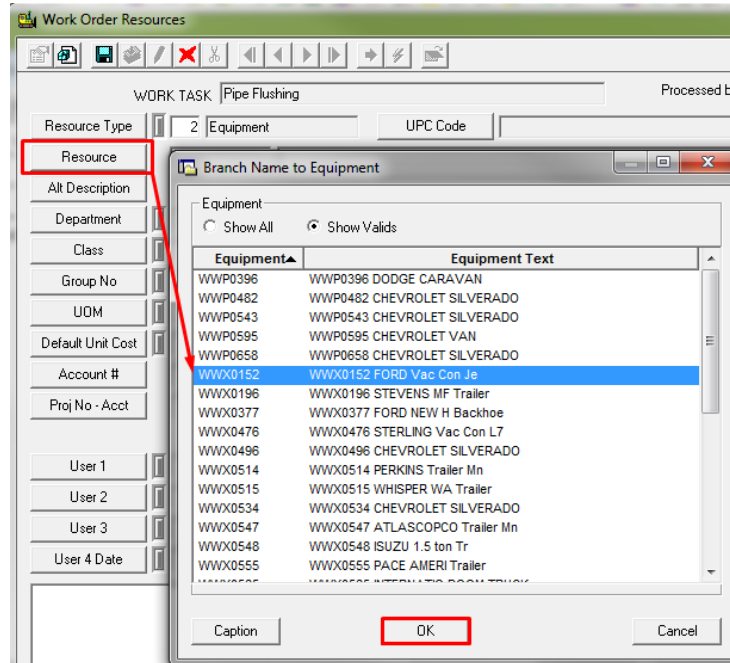
Seq#	Category Text	System ID 1	Completion Date	Completion Time	Desc 1	Desc 2	Odomete
1	Sewer Pipe	19571			117031 - 1068 S WAND...	117032 - 1058 S WAND...	
2	Sewer Pipe	19569			117027 - 2065 E CATH...	117029 - 1108 S WAND...	
3	Sewer Pipe	19570			117028 - 2001 E WARN...	117029 - 1108 S WAND...	
4	Sewer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

Tasks & Resources Tab



- This tab contains two grids: Tasks and Resources. In the first, you'll include the task (the job to be completed). In the second, you'll name the resources used (employees, equipment, materials, fluids, contractors).
- An individual Task has the resources listed against it. You can name more than one task on a Work Order if necessary, but it is recommended to keep it simple by including only one.
- Resource entries contain details including the dates worked, hours worked for employees, units used for other resource types (materials, fluids, etc.), and the Project Number the work is assigned to. This is very important because it feeds information back to Project Management, Timesheets (labor hours), or Inventory Control (amount of parts used). These details might also be feeding information about the job back into another integrated financial system that helps manage project costing and budgeting, or payroll.
- To add a **Task**, right click in the **Work Tasks** grid and select *Populate Main Task*.
- To add a different **Task**, right click in the **Work Tasks** grid and select *Add Record*. The Work Order Tasks form will open.
 - Click the **Task** button to pop-up the task list. Select a Task from the list.
 - Click Save  and Close  the Work Order Tasks form. The task you selected will now appear on the work order.
- To add **Resources**, right click in the resources grid and select *Add Record*. The Work Order Resources form will appear.
 - Select a **Resource Type** (1 = Employee, 2 = Equipment, 3 = Materials, 4=Fluid, 5=Contractor).

Notes: _____

- 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.

Costs Tab

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

Work Order # 2014-00397 Category 21200 Sewer Pipe
Status Problem WWCPPBLK Blockage
Status Date 08/15/2014 11:28 AM Main Task WWEPPFLS Pipe Flushing

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

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

Use Task Info

Record 3271 of 3271 Edit Mode Ready...

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

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

Notes: _____

