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TRAINING GUIDE

Work Orders and Requests

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Work Orders

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

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

Table of Contents

Work Orders
Creating a Work Order2
Header Information3
WO Tab
Location OR Asset Tabs 4
Tasks & Resources Tab7
Adding Multiple Resources to Work Orders9
Costs Tab 10
Creating a Work Order from Within another Work Order 11
Creating a Work Order from the Asset Grid 11
Creating a Work Order from a Resulting Task 14
Creating a Work Order from the Toolbar Button14
Creating a Work Order from an Asset Module 15
Creating a Work Order from an Inspection Module 19
Creating a Work Order from ArcGIS 21
Completing the Work Order
Work Requests 25
Creating a Work Request 25
Duplicate Requests 32
Creating a Work Order from a Work Request 34
Linking a Work Order
Associating Work Orders with Requests

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: Standard, Lite, and Daily Work. All three modules 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.

Creating a Work Order

As explained above, three work order modules are available. 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.

🖼 Work Orders - Unnamed Filter Set	
Work Order # Cat	regory 21200 Sewer Pipe
Status 2 New Work Order Pro	blem
Status Date 7 / 💌 : AM Main	n Task
W0 Location Assets List/Events Tasks/Res Routing Costs B	illing Related Requests/Track Links Custom 1 Custom 2 Comments
Asset	Comment From Request
Location	^
,	
Cause	
Assigned Crew	
Supervisor 87 SHIELA KAMDON	Assigned By
Lead Worker	Assigned Date /// 💌 : AM Override Notifications
Priority I Immediate Priority	Start Date / / 💌 : AM Problem
Account #	End Date / / 💌 : AM Overdue
Proj No - Acct	Lead Worker
Project Text	Master Project ID Task
Reason	Name Supervisor
Press F9 for Popup, F7 for Filtered Popup	Record 0 of 0 Add Mode Ready

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.
 - o We've selected the associated main task, Pipe Flushing.
 - *Note:* The Status field will automatically be populated with 2–New Work Order. The Status Date, Time, and Work Order # will be populated when the record is saved.

😫 Work Orders - Unnamed Filter Set									
	6 ◀◀▶▶ ⇒ ୬ ଊାଇ ■ ● ∢ ▼ ≤								
Work Order # Status 2 New Work Order Status Date	Category 21200 Sewer Pipe Problem WWCPPBLK Blockage Main Task WWEPPFLS Pipe Flushing								

WO Tab

- Select a Supervisor.
 - In our example below, the Supervisor, Sheila Kamdon 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 Orders - Unnamed Filter Set	
	▶▶≠∅ख़ख़⋒⋒⋧∊⋧∊
Work Order # Catego Status 2 New Work Order Proble Status Date / / : AM Main Ta	m WWCPPBLK Blockage ask I WWCPPFLS Pipe Flushing
Costs Billing Location Assets List/Events Tasks/Res Routing Costs Billing	g Related Requests/Track Links Custom 1 Custom 2 Comments
Asset	
Location	
Cause	
Assigned Crew	
Supervisor 87 SHIELA KAMDON	Assigned By
Lead Worker	Assigned Date 7 / 💌 : AM Override Notifications
Priority I Immediate Priority	Start Date 08/18/2011 - : AM Problem
Account #	End Date 08/18/2011 🛨 : AM Overdue 🗆
Proj No - Acct	Lead Worker
Project Text	Master Project ID Task
Reason	Name Supervisor
	Record 0 of 0 Add 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.

📓 Work Orders - Unnamed Filter Set	
Work Order # Category 21200	Sewer Pipe
Status 2 New Work Order Problem WWCP	PBLK Blockage
Status Date 🛛 / / 💌 🖂 AM Main Task 🚺 WWEP	PFLS Pipe Flushing
WO Cocation Assets List/Events Tasks/Res Routing Costs Billing Related Requ	ests/Track Links Custom 1 Custom 2 Comments
Department 41070200 Waste Water Collection	Comment to Crew
	Standing water and sewage material present. Clean
Area	
Sub-Area	
Owner	
Location	
Classification	T
Work Order Location	
No / Address Address2 Loc X Coord. Loc Y Coord.	General Location Star
III	4
Press F9 for pop-up selection	Record 0 of 0 Add Mode Ready

• To add a location to the grid, right click in the grid and select Add Record.

						lion		
No 4	Address	Add	ress2	Loc X Coord.	Loc Y Coord.	General Location		Star
•	II	"		Record v In Map				4
						Record 0 of 0	Add Mode	Ready

• A new form will open allowing you to enter one or more locations.

Work Locations	
Location No 1	
Address 343 🚺 📈	GALVESTON ST Loc Apart/Suite
Address 2	
General Location	
Loc City	Loc Parcel Number
Loc State	Loc Country
Loc Zip Code	Sub Division
Loc X Coord.	Loc Y Coord.
Start Date 📔 / / 💌	Completion Date / / /
	Record 0 of 0 Add Mode Ready

- Enter the address, general location, and any other details needed.
 - o As you can see in the example above, this problem is located 343 W. Galveston St.
- Save 🔲 the record. You can now add 灐 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.

90 <mark>8×0/8</mark> 1		*				
Category 21200 Se	ewr <u>_</u>					
System ID 1	Sewer Pipe					
System ID 2	US Structure	Pipe Rec #	DS Structure	Alt Pipe ID	^	<u>S</u> elect
oyotom ib z	113493	15603	113494	6549-622	_	
Attributes Custom Water Meter Com	nr 113494	23823	113495			Close
	113495	15587	113497	955-224		
Desc 1	113496	18832	127239	113496		
	113497	21420	113498	113497		
Desc 2	113498	21421	113499	113498		
Completion Date 👖 🛛 🗸	113499	21422	113500	113499		
	113500	25398	113501			
Units 📗	113501	18833	127235	113501		
User 1	113616	27890	113618			
	113617	15629	113619	684121		
User 2	113618	25419	113497			
	113619	15630	113618	462585		
	113620	25420	113488			
User 18	113621	21458	113620	113621		
	113622	27886	113621			
PM Description	113623	27887	113500		-	

- 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 113618 for the sewer pipe located on W Galveston Street, our work location.
- Save He Asset record and the Asset will now be listed in your Work Order. You can add as many assets as you like.

🕍 Work Orders - Unnamed Filter Set		_ • •
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Work Order #	Category 21200 Sev	ver Pipe
Status 2 New Work Order	Problem	skage
Status Date / / 💌 🗄 AM	Main Task	e Flushing
W0 Location Assets List/Events Tasks/Res Routing C	osts Billing Related Requests/Track	Links Custom 1 Custom 2 Comments
Seq/ Category Text System ID 1 System ID 2 1 Sewer Pipe 113618 113497	2 Completion Date Desc 1 343 W GALVESTO	Desc 2 Odome
1 Sonorripo - Trasto - Trasto	345 W GAEVESTO	

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

Subset Manager	
BR-549	Load
	Load into Filter
	New
	<u>D</u> elete
	<u>C</u> lose
L'	

- 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, there is only one sewer pipe subset available, created in either the Sewer Pipe Inventory module or GIS map. We have chosen to load the subset titled "BR-549", containing three pipe records.
- Highlight a subset name and click *Load*. All assets in that subset will be added to the grid.

WO	Loca	ation Assets	List/Events	Tasks/Res	Routing	Costs	Billing F	Related	I Requests/Track	Links	Custom 1	Custom 2	Comments
	SeqA	Category Te	xt Syst	em ID 1	System I	D 2	Completion	Date	Desc 1		De	sc 2	Odome
[1	Sewer Pipe	113618	} -	13497				343 W GALVESTO	NIST	E LESLIE C	T	
	2	Sewer Pipe	113495	; -	13497				1424 S PROJECT D)R	E LESLIE C	T	
	3	Sewer Pipe	113497	, -	13498				E LESLIE CT		4626 E SEA	GULL ST	
	- 4	Sewer Pipe	113498	} :	13499				4626 E SEAGULL S	βT –	E DONATO	DR	
	_												
	•												- F

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 about the job back into a financial system that helps manage project costing and budgeting.
- To add a Task, right click in the Work Tasks grid and select *Populate Main Task*.
- To add a different Task, right click in the Work Tasks grid and select *Add Record*. The Work Order Tasks form will open.
 - Click the Task button to pop-up the task list. Select a Task from the list.
 - Click Save and Close the Work Order Tasks form. The task you selected will now appear on the work order.

- To add **Resources**, right click in the resources grid and select *Add Record*. The Work Order Resources form will appear.
 - Select a Resource Type (1 = Employee, 2 = Equipment, 3 = Materials, 4=Fluid, 5=Contractor).
 - Click the **Resource** button to see a list of available resources of the type you selected; then, select a resource.
 - In our example below, we've selected the material 'Pipe, STR35 10" '.

🛀 Work Order Resources								
	▶ ▶ ♦ <i>¥</i>	Ĩ.						
Resource Type 3 Material	WO	RK TASK Pipe Flushing						
Resource	🖪 Branch Name	to Material ID						
Alt Description	Material							
Department	C Show All	Show Valids						
Class 🚺	Material	ID a Materi	al Text					
Group No	13409	Pipe, DI, 16"						
	13410	Pipe, DI, 18"						
Unit of Measure 📔 2 Each	13411	Pipe, DI, 21"						
	13412	Pipe, DI, 22"						
Default Unit Cost	13413	Pipe, DI, 24"						
Account #	13414	Pipe, DI, 4"						
	13415	Pipe, DI, 5"						
Proj No - Acct	13416	Pipe, DI, 8"	E					
	13426	Pipe, STR35, 10"						
	13427	Pipe, STR35, 12"						
User 1	13428	Pipe, STR35, 16"						
	13429	Pipe, STR35, 18"						
	13430	Pipe, STR35, 21"						
	13431	Pipe, STR35, 22"						
	13432	Pipe, STR35, 24"	T					
Press F9, F8 (linked), F7 (filtered) for Popup	Caption	ОК	Cancel					

- 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 (Foot), and unit cost (\$7.00) has all been carried over from the inventory 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 32, representing the number of feet of pipe used.
- For employee resources, a *Time Cost* of Regular Time is entered automatically; however, this can be changed.
- Enter the dates the resource worked on the job. The Start Date and End Date must be the same. This means that an INDIVIDUAL RESOURCE ENTRY is required for each resource on each job for each day.

• Click Save 📕 and Close 🛸 the Work Order Resources form. The resource you selected will now appear on the work order.

💁 Work Order Resources						
WORK TASK NUNITTEST9	Processed by Financials					
Resource Type						
Resource						
Alt Description						
Department						
Class	Norm Regular OT Total Estimated					
Group No	Units					
Unit of Measure	Time Cost					
Default Unit Cost 0.000	Unit Cost 0.000 0.000 0.000					
Account #	Total Cost 0.00 0.00 0.00 0.00					
Proj No - Acct	Res Start Date 7 / 💌 : AM					
	Res End Date 7 / 💌 : AM					

Adding Multiple Resources to Work Orders

Group	Type	Resource	Resource Text		ИОМ	Units	Cost	Alt
aloup	Material	13426	Pipe STB35-10"		Foot	32.00	224	
			Add Record					
			Delete Record					
			Populate Dates	E	Imployees			
• 🕒		Populate Hours			quipment			
			Populate Units		Materials Fluids			
			Group Selected Resources	0	Contractors			
			Add Multiple 🕨	0	Crews			

- 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

Employee /	Employee	Name				Cancel
116	YING CHO					
12	YOLANDA FIRESTONE					
137	DAVID BEAR				E	
142	TOM TAYLOR				_	
183	PATRICK NORMAN					
191	ALEX LOCK					
192	DAVID CARD					
200	JASON PEPPER				_	
206	WILL HINKLEY					
251	BUCK JOHNSON FBED MASON					
30	DALE VERDON				-	
	Norm Regular	OT Estimated				
Units						
Time Cost	1 REGULAR TIN	E				
\vailability		E S	how Work Orders			
Status/W0 #	‡∆ Reason/Task	Start Date	Start Time	End Date	End Tin	

the number of units (In this case we are entering 2 hours), press *Select* and they'll be placed on the Work Order.

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

nesc	Juices									
G	roup	Туре	Resource	Reso	urce Text	UOM	Units	Cost	Alt Description	Res
		Employee Employee Employee	183 192 206	PATRICK NORMAN DAVID CARD WILL HINKLEY	Add Record Delete Record	Each	2.00 2.00 2.00	61.96 47.29 50.67		
					Populate Dates					
•					Populate Hours					۲
					Populate Units					
					Group Selected I Add Multiple	Resources	•			

Costs Tab

- This tab allows you to store cost information, such as quantity used, 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 \$16.07 less than we estimated.

🔛 Work Orders - No Filter				
		8 😪 🔛	• 🔕 - 🧶	- 🛋
Work Order # 2011-00375 Status 2 New Work Order	Category 21200	Sewer Pipe	1	
Status Date 08/19/2011 V 09:16 AM	Main Task	Sewer Line	Cleaning	
W0 Location Assets List/Events Tasks/Res Routing Cost		,		Custom 2 Comments
		Actual	Estimated	Difference
Projected Compl	W0 Duration	O.00	Estimated	0.00
Repair 📕	Labor Hours	6.00	0.00	0.00
Subcontractor	Labor Costs	159.93	175.00	15.07
Profit Center	Material Cost	224.00	225.00	1.00
	Fluid Cost	0.00	0.00	0.00
	Equipment Costs	0.00	0.00	0.00
Quantity 🚺 847.52 Lock 🛙	Contractor Costs	0.00	0.00	0.00
Unit of Measure II It Foot	Misc. Costs	0.00	0.00	0.00
Unit Cost 0.45	Total Cost	383.93	400.00	16.07
W0 Hours 0.00	Use Task Info	~		
		Record 324	13 of 3243	View 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.

Creating a Work Order from Within another Work Order

The *Work Order Standard* and *Lite* modules allow you to manually create a new work order from within an existing work order. This will automatically link the two work orders together. There are three ways to achieve this, and each serves a different purpose. In the step-by-step examples below, we'll demonstrate each of these three methods.

Creating a Work Order from the Asset Grid

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

You may use this function if some of the assets in one work order need additional work done that is not covered by the tasks and resources selected in the current work order. For example, if you have a TV Inspection work order involving seven sewer pipes and three of those pipes also need to be cleaned, you can create another work order from the Asset grid for those three pipes. Follow the steps below:

1. Select the asset(s) you want included in the new work order. You can use the <Shift> or <Ctrl> keys to select multiple assets.

2. Right click and select *Create New Work Order*. You will be prompted to view the work order at this time. Click "Yes" and it will open immediately. Click "No" and it will not open, although it will still be created.

Work Orders - No Filter		
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Work Order # 2011-00	1975	Category 21200 Sewer Pipe
	L	
Status 📕 2	New Work Order	Problem
Status Date 08/19/	2011 🗾 09:16 AM	Main Task
Landa La La Contra		
W0 Location Assets	List/Events Tasks/Res Routing Los	osts Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Seq / Category T	ext System ID 1 System ID 2	2 Completion Date Desc 1 Desc 2 Odome
1 Sewer Pipe	113495 113497	1424 S PROJECT DR E LESLIE CT
2 Sewer Pipe	113497 113498	E LESLIE CT 4626 E SEAGULL ST
3 Sewer Pipe	113498 113499	4626 E SEAGULL ST E DONATO DR
4 Sewer Pi	Add Record	343 W GALVESTON ST E LESLIE CT
	Additection	
	Delete Record	
	Subsets	•
•	View Asset Inventory Record	•
Associated Tasks	View Asset in Map	
	view Asset in Map	
Taski	Create New Work Order	ask End Date Status Text Task Supervisor Text
	Add Multiple	
	Add Multiple Sewer Pipe	
	Add Assets from Map	
	Populate Complete Date	Record 3243 of 3244 View Mode Ready
	Change Status to Operational	Kecord 3245 of 3244 View Mode Keady
	Change Status to Out of Service	
	Sewer	►
	Storm	•

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

🔩 Work Orders - No Filter	
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Work Order # 2011-00377	Category 21200 Sewer Pipe
Status 2 New Work Order	Problem
Status Date 08/21/2011 🔽 09:40 PM	Main Task
W0 Location Assets List/Events Tasks/Res Routing Co	sts Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Seq/ Category Text System ID 1 System ID 2	
1 Sewer Pipe 113497 113498	E LESLIE CT 4626 E SEAGULL ST
2 Sewer Pipe 113618 113497	343 W GALVESTON ST E LESLIE CT

Notes:

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

📓 Work Orders - No Filter
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Work Order # 2011-00377 Category 21200 Sewer Pipe
Status 2 New Work Order Problem
Status Date 08/21/2011 • 09:40 PM Main Task I
WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Associated PMs Associated PM / Associated PM Text Closed PM
Resulting Tasks Work Order # / Initiating Task Type Resulting Task Type Auto Create WO Link to Init. WO Start Date
Related Work Orders Work Order # / WO Creation Date Main Task Text Assigned Crew Text Status
2011-00375 08/19/2011 Sewer Line Cleaning New Work Order 08/19/2011 08/
/
4 H
Record 3245 of 3245 View Mode Ready ///

Creating a Work Order from a Resulting Task

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

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

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

🛀 Work Orders - No Filter					
<u> </u>		ا ۹ او 🐰 🖌 🎕	▶ <mark> </mark>	🔜 뼈 🍳 v 🧼 v	1
Work Order # 2011 Status 1		Category Problem Main Task	21200 Sew	er Pipe	
Associated PMs					
Associated PM 🗠	Associated P	M Text Clo	sed PM		
Resulting Tasks				1	
Work Order # A	Initiating Task Type	Resulting Task Typ Pipe Repairs	e Auto Create WO	Link to Init. WO	Start Date
		ripo riopano	No	View Re	ecord
				Add Re	cord
◀				Edit Re	cord
Related Work Orders				Delete	Record
Work Order # △ 2011-00375	W0 Creation Date 08/19/2011 S	Main Task Text ewer Line Cleaning	Assigned Crew Text	Statu New W Create	Resulting WO
		-			
				Go To \	Work Order
•		III			
			Reco	ord 3245 of 3246 Viev	v Mode Ready

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

Creating a Work Order from the Toolbar Button

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

- 1. Click the 🔜 button on the module toolbar in the current work order.
- 2. Like before, you will be prompted to view the new work order.

Notes:

3. As you can see below, the Category, Problem, and Main Task in the new work order's header are blank, but the related work order is identified on the Related tab.

🖼 Work Orders - No Filter					
▤◙◙ਲ਼੶ਲ਼੶₪	- 🖻 🕘 📕 🗙 👙) • / 6 4	M 🛋 🔍 🗸 🖉 🖛 🔛	Š
Status Date 08/22/201	New Work Order	Category Problem Main Task Duting Costs Billing Rel	Image: Constraint of the second se	Links Custom 1 Custor	n 2 Comments
Associated PMs	Associated PM 1	[ext Closed]			
Associated PM /	Associated PM 1	Liosed	-141		
Resulting Tasks					
Work Order # 🛆	Initiating Task Type	Resulting Task Type	Auto Create W0	Link to Init. WO	Start Date
•	Ţ	11			Þ
Work Order #	w/0 Creation Date	Main Task Text	Assimum Course Trank	Status Text Sta	art Date Er
		main Task Text	Assigned Crew Text		art Date Er 9/2011 08/
2011-00377 08/3	/21/2011			New Work Order	
•	11	I,			•
			Reco	rd 1 of 1 View	Mode Ready

Creating a Work Order from an Asset Module

Our asset inventory modules also contain a Create New Work Order button. This feature allows you to create a work order directly from an asset record. The system will then include the asset and location information in the new work order. Let's look at an example using the *Pipe Inventory* module.

1. Click on the Create New Work Order button.

茸 Pipe Inventory - Greater than 8in pipes	
◼▰◙◙₽ੑੑ੶ਲ਼੶ਲ਼੶ਲ਼₽	▶ ▶ ∻ ୬ ⊠ ≒ 🔤 🖬 🖬 🖛 🍳 - 🔳 🧶 - 🛸
US Structure 127438 2285 E STOTTLER DR DS Structure 127439 2260 E STOTTLER DR Attributes Construct Elevations TV PACP Lamping Smoke Lateral	Alt Pipe ID 127438
Pipe Rec # 16486	Map Page No. 1-388 Review Comments
Status Status	Length (ft) 165.2
Collected By Barney	Length Status 2 As-Built Drawings
Flow Basin C-316432	Pipe Sec Length (ft) 643.4 Est # of Joints
Owner U Public	Material 3 Concrete
Location 2 Alley	Liner 2 Fold & Form
Line Type I Gravity Line	Lining Date 📕 / / 💌
Flow Type 1 Sanitary	Slope % 24.817 Slope Lock
Pipe Shape 1 Round	Mannings 6.420
Cleaning Freq	Capacity (cfs) 0.02
TV Frequency	IDM
Dia/Height (in)	
Pipe Width (in)	
	Record 1 of 101 View Mode Ready

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

9	🛃 Create Work Order	
	Based On © Entire <u>Fi</u> ltered Recordse	t
	Select Template	
	PM/Template PM/Template Tex	t
	WWHOTSPOT Hot Spot	
	OK Cano	el

- By selecting 'Entire Filtered Recordset', the new work order will contain all assets included in the current filterset.
- 3. Next, you can choose a PM Template for the work order from the list. This is not required.
 - For our example, we'll be creating a work order based on the current record, without using a PM Template.
- 4. Click *OK* to create the work order.

Notes:

- 5. Next, choose a category for your work order from the work flow category tree. For our pipe asset, we've chosen Sewer Pipe as the work flow category.
 - If you used a PM Template, you'll skip this step.
 - Note that assets are associated with categories in *Work Flow Setup*. If you select a category that has not been associated with your asset, you'll receive a message asking you to select a new category
 - Note: The program will attempt to choose a Category on its own.



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



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

Notes:	 		

8. When the work order is generated, the asset information will be entered into the WO tab and Asset tab. The category you chose will appear in the header. Default information associated with the category will be entered by the system. For additional information on setting up this default data, please consult the related workbook, *Work Flow Setup*.

🔛 Work Orders - Unnamed Filter Set	
Work Order # 2011-00381 Cates	pory 121200 Sewer Pipe
Status 2 New Work Order Prob	em 📕
Status Date 08/22/2011 🔽 04:34 PM Main 1	Fask
W0 Location Assets List/Events Tasks/Res Routing Costs Bill	ng Related Requests/Track Links Custom 1 Custom 2 Comments
Asset 127438 127439 2285 E STOTTLER DR	Comment From Request
Location	
Cause	
Assigned Crew	
Supervisor	Assigned By
Lead Worker	Assigned Date / / 💌 : AM Override Notifications
Priority	Start Date / / 💌 : AM Problem
Account #	End Date / / 💌 : AM Overdue
Proj No - Acct	Lead Worker
Project Text	Master Project ID Task
Reason	Name Supervisor
	Record 1 of 1 Edit Mode Ready //

Creating a Work Order from an Inspection Module

Our inspection modules also contain a Create New Work Order button. This feature allows you to create a work order for an asset directly from one of the assets inspection records. The system will then include the related asset and location information in the new work order and link the work order back to the inspection. Let's look at an example using the *Hydrant Inspection* module.

Hydrant Inspection - No Filter	
■588¥ - 7 - 8 - 89 = \$1×× 4 4 > > > \$988 <mark>8</mark> 8 - 2 - 2 - ≤	
Hydrant Rec # 2 Inspection Date 04/10/2007 • : AM Most Recent Inspection Hydrant Number 545 Address 643 E CHEYENNE ST	
Inspection Custom Comments	
Inspected By	
Inspection By	
Overall Cond 2 Good Packing Cond 2 Good	
Operating Cond I Excellent Valve Cond I Good	
Damage Type 0 N/A Valve Seat Cond 2 Good	
Paint Condition 2 Good Nozzle Condition 2 Good	
Drain Condition 2 Good Grade to Nozzle	
Oper Nut Cond 2 Good Hydrant Flushed	
Cap Chain Cond	
Cap Condition 2 Good Next Insp Date 04/10/2009 -	
Record 1 of 79 View Mode Ready	

1. Click on the Create New Work Order button.

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

🕍 Create Work Ord	der	X
Based On		
 Current Record 	d C Entire Filtered Recordset	
Select Template		
PM/Template	PM/Template Text	^
WTDHYFT	Hydrant Flow Test	
WTDHYRPR	Hydrant Repair	=
WTDHYM	Hydrant Maintenance	_
WTDHYP	Hydrant Painting	
WTDHYRPL	Hydrant Replace	
WTDHYINS	Hydrant Install	
544-WTDHYRPL	-Hydrant Replace	
1204-ENGTR06	-Road Closures	
1205-ENGTR06	-Road Closures	
1206-ENGTR06	-Road Closures	
1207-ENGTR06	-Road Closures	
1208-ENGTR06	-Road Closures	*
	0K Cancel	

- By selecting 'Entire Filtered Recordset', the new work order will contain all assets related to the inspections included in the current filterset.
- 3. Next, you can choose a PM Template for the work order from the list. This is not required.
 - For our example, we'll be creating a work order based on the current record, without using a PM Template.
- 4. Click OK to create the work order.
- 5. Next, choose a category for your work order from the work flow category tree. For our pipe asset, we've chosen Sewer Pipe as the work flow category.
 - If you used a PM Template, you'll skip this step.
 - Note that assets are associated with categories in *Work Flow Setup*. If you select a category that has not been associated with your asset, you'll receive a message asking you to select a new category
 - Note: The program will attempt to choose a Category on its own.



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



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

8. When the work order is generated, the asset information will be entered into the WO tab and Asset tab. The category you chose will appear in the header. Default information associated with the category will be entered by the system. For additional information on setting up this default data, please consult the related workbook, *Work Flow Setup*.

🕍 Work Orders - Unnamed Filter Set	
■ 8 07 - ♥ - ■ - ₽0 ■ <i>●</i> / ×	シ ◀◀▶▶ ▶♥▨閉■■▲▼♥▼ ☞
Work Order # 2013-00013	Category 41200 Hydrants
Status 2 New Work Order	Problem
Status Date 08/22/2013 02:15 PM	Main Task
	Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Asset 544 Clow Medalion Dry-Barrel	Comment From Request
Location 754 S 135TH PL Your Town	
Cause	
Assigned Crew	
Supervisor	Assigned By
Lead Worker	Assigned Date 7 / 💌 : AM Problem
Priority	Start Date 🚺 📝 🔽 : AM Overdue 🗆
Account #	End Date 🚺 / / 💌 : AM Lead Worker 🗆
Proj No - Acct	Task 🔽
Project Text	Master Project ID Supervisor
Reason	Name Hard Lock WD
par ;]	Hard Lock WU
	Record 1 of 1 Edit Mode Ready
	Record 1 of 1 Edit Mode Ready //

- 9. To view the inspection that is related to the work order, go to the Asset tab.
- 10. Right-click on the fire hydrant record and select View Asset Inspection Record.

Creating a Work Order from ArcGIS

In addition to creating work orders from within the desktop, we also provide a tool to create work orders directly from ArcMap.

- 1. Open your map project.
- 2. Click on the Open Module tool 👫 on the Lucity GIS toolbar.
- 3. 🕂 🕂 📈 🖉 🖀 🥸 🥸 📑 | Lucity Views 🕶 📺 🔨 🔶 |
- 4. Right click on a feature in the map. You'll see the menu pictured below.

- 5. Select Create Work Order and then select which asset or X/Y coordinate you would like associated with the new work order. All available asset types will appear in the list.
 - You have the ability to create work orders for a single asset, all assets (a single work order with all selected assets on it), or each asset (separate work orders for each asset selected).
 - In the example below, we've chosen to create a new work order for the sewer structure asset number 113490.



6. The work order dialog shows the fields required to create a work order. You may need to select a category of work or Supervisor using the buttons to the right. As you can see below, the Sewer Manhole category has already been selected for our work order.

۲ł-	Req	uired Fields for V	Work Order					• X
		WorkOrder#	Asset(s)	Category (Required)	Supervisor (Required)			
Þ	θ		Sanitary Structure Inventory: 113490	Sewer Manhole 🔻		0 -		
			Submit and View in Lucity	Submit and View in Lucity Web	Submit Only	Cancel	Export the current map display and attach it to the work order(s)	

Notes:

7. Select the supervisor using the dialog box.

Supervisor Items	x
DALE VERDON Don Pinkston George Butler MARIO VINCE Nicole Schmidt	
Show All	cel

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

1 Santary Structure Inventory: 113490 Sever Manhole MARIO VINCE	
m Export the current ma	diaplay and attach it

- 9. The new work order will contain the category and asset you selected.
 - As you can see below, the Sewer Manhole category appears in the header. The sewer structure asset we selected in the map, number 113490, appears on both the WO and Assets tabs, and work order was assigned to Mario Vince.

😼 Work Orders - No Filter	
	▏┫◀▶▶ ⋟ӳ፼馏盟▰ዿ▾◈▾
Work Order # 2011-00382	Category 21100 Sewer Manhole
Status 2 New Work Order	Problem
Status Date 08/23/2011 💌 08:12 AM	Main Task
W0 Location Assets List/Events Tasks/Res Routing Co	sts Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Asset 113490 Standard	Comment From Request
Location E LESLIE DR	^ ^
,	
Cause	
Assigned Crew	
Supervisor 85 MARIO VINCE	Assigned By
Lead Worker	Assigned Date 7 / C AM Override Notifications
Priority 📕	Start Date 📕 / / 💌 : AM Problem 🗖
Account #	End Date / / 💌 : AM Overdue
Proj No - Acct	Lead Worker
Project Text	Master Project ID Task
Reason	Name Supervisor
,	
	Record 3250 of 3251 View Mode Ready

📓 Work Orders - No Filter			- • •
◼◓◙ਫ਼੶ਲ਼੶๒੶₽₽	{ 	🖗 🤧 🖴 🕋 🗸 🖉 🗸	
Work Order # 2011-00382	Category 21100	Sewer Manhole	
Status 2 New Work Order	Problem		
Status Date 08/23/2011 - 08:12 AM	Main Task 📗		
W0 Location Assets List/Events Tasks/Res Routing C	Costs Billing Related Request	ts/Track Links Custom 1 Custor	m 2 Comments
Seq / Category Text System ID 1 System ID :	2 Completion Date D	lesc 1 Desc 2	Odome
1 Sewer Manhole 113490	Standard	0 E LESLIE DR	

Completing the Work Order

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

- 1. First, double check all of the information in the work order (especially the resource information) and then return to the first tab, WO.
- 2. Check the information on this tab. The Start and End Dates are important.

3. Finally, change the Work Order Status in the header to Complete (code 999) and Save 🗐 the record. That's it! This completes the Work Order.

🔛 Work Orders - No Filter 📃 🖃
▁▟▓ਸ਼ੑ੶ਲ਼੶⊡੶₽₽ ▋X\$/% (())
Work Order # 2011-00376 Category 21200 Sewer Pipe
Status 999 Complete Problem WWCMHOD Odor Control
Status Date 08/23/2011 🔽 08:57 AM Main Task 🚺 WWCMHOR Odor Control Repair
WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Asset 113497 113498 E LESLIE CT
Location
Cause
Assigned Crew
Supervisor SHIELA KAMDON Assigned By
Lead Worker
Priority 🚺 2 Same Day Priority Start Date 🚺 08/23/2011 🗹 : AM Problem 🗖
Account # Account # Overdue
Proj No - Acct Lead Worker
Project Text Task
Reason Supervisor
Record 3244 of 3251 View Mode Ready

Work Requests

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

Creating a Work Request

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

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

🗑 Work Requests - Unnamed Filter Set	- • •
Request # Status 1 New Request Status Date // 💌 : AM	
Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Tracking Custom Comments	
Information for Work Order	
Category 12320 Pavements	
Problem STRDPH Pothole Repair	
Cause	
Priority Publically Available	T
Loc Address Loc Apart/Suite	
Loc Street2	
General Location	
Loc City Loc Parcel Number	
Loc State Loc X Coord.	
Loc Zip Code Loc Y Coord.	
TB Year	
Supervisor J 29 JASON WRIGHT TB Coordinates	
Affected Asset TB Page	
Record 0 of 0 Add Mod	e Ready
Record 0 of 0 Add Mode	neauy

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

Notes:

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

To Work Requests - Unnamed Filter Set	- • ×
◼◙▧๙▾▿▾◙▾◙◙ ◼≍◈◢◟ ◖◂▸▶ ▸४▨◳◙▬◉<◾◈▾Ⴆ	
Request # Status 1 New Request Status Date // 💌 : AM	
Customer Request Scripts Department/Utility Locates WO Custom Notification Requesters Tracking Custom Comments	
Phone # 685-7761 Util Acct #	
Name George N Business	
Req Address 2765 E HOBART ST Apartment/Suite	
Req Address 2	
Req City Your Town Req State KS Req Zip Code 85296-8991	
Req Country Parcel Number	
Sub Division	
Home Phone # 685-7761 Work Phone #	
Phone 1 Phone 2	
A	
· · · · · · · · · · · · · · · · · · ·	
F4 - fill from previous Requests. F8 - search for Customer. F7 - search for Requests. Record 0 of 0 Add Mode	Ready

• In our example above, we've begun to enter a request from George N. Thomas. Using his phone number and the F8 shortcut, we searched for matching address and contact information. This allowed us to easily enter details about the caller.

- 6. Now, open the **Request** tab. We'll use this tab to enter information about the reason for the call.
 - Click the Category button and a list of categories will appear.
 - Click the plus [+] sign beside a folder to open a category group; then select the appropriate category for the caller's concern.

🗑 Work Requests - Unnamed Filter Set		
	★♥/& ◀◀▶▶ ▶४◙९३■●● ▼≥♥ №	
	Status 1 New Request Status Date 7 / 💌 : AM	
Category Problem Cause Priority Loc Address Loc Street2 General Location Loc City Loc City Loc State Loc Zate Supervisor Affected Asset		*
	Record 0 of 0 Add Mod	le Ready //

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

🗑 Work Requests - Unnamed Filter Set	- • ×
Request # Status 1 New Request Status Date // 💌 : AM	
Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Tracking Custom Comments	
Information for Work Order	
Category 12320 Pavements	^
Problem STRDPH Pothole Repair	
Cause	

• In our example, we've chosen STRDPH - Pothole Repair as the problem being reported.

- 7. Enter the address OF THE ISSUE (not the caller's address).
 - Note the shortcut; if the Request address is the same as the caller's address on the previous tab, you can press F4 to carry it forward.

🗑 Work Requests - No Filter	- • ×
Request # Status 1 New Request Status Date // 💌 : AM	
Customer Request Scripts Department/Utility Locates WO Custom Notification Requesters Tracking Custom Comments	
Caller has noticed potholes on Hobart between the 2500 and 2800	
Category 12320 Pavements	
Problem STRDPH Pothole Repair	
Cause	
Priority Publically Available	-
Loc Address I E HOBART ST Loc Apart/Suite	
Loc Street2	
General Location	
Loc City Vour Town	
Loc State KS Loc Country Loc X Coord.	
Loc Zip Code 🚺 85296-8991 Sub Division 🗍	
TB Year	
Supervisor 8 WILSON BEAN TB Coordinates	
Affected Asset	
F3 - Duplicates. F7 - All Requests. F8 - search Owner. F9 - Address popup. Record 0 of 1 Add M	ode Ready

- In our example, George N. Thomas has called in to report a pothole in front of his home residence. Thus, we have used the F4 function to carry his address forward to this tab.
- To enter additional comments to be carried over to the work order, simply place your cursor in the bottom grid and begin typing.
 - In the example above, we have noted that the potholes have been found between the 2500 and 2800 blocks of Hobart.

Notes:	 	 	

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

🗑 Work Requests - Unnamed Filter Set			x
Request # Status 1 New Request Status Date / / . Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Tracking Custom Comments			1
Sequence / Question Response 1 What size are the potholes? 2 2 When did you notice the potholes? 3 3 Has any damage been caused to your vehicle			
Press F9 for pop-up selection Record 0 of 1 Add	d Mode	Ready	

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

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

Problem Script	×	J
Sequence	1	
Question	What size are the potholes?	
Response		
	Record 1 of 3 Edit Mode Ready	-

🗑 Work Requests -	Unnamed Filter Set		- • ×
- 4 19 4 -	♥ - @ - @ @ <u>-</u> × @ /	◬◀◀▶▶ ◈▨閉▤▰◕▾▤◈▾"◙	
Request #	Status	1 New Request Status Date / / 💌 : AM	
Customer Reques	t Scripts Department/Utility Locates WO 0	ustom Notification Requesters Tracking Custom Comments	
Sequence 🛆	Question	Response	
	/hat size are the potholes? /hen did you notice the potholes?	About a foot in diameter. Within the last week,	
	as any damage been caused to your vehicle		
		Record 0 of 1 Add	Mode Ready
		INECOID 0 01 Add	would inteduy

- In our example, we have recorded responses to the problem scripts. Within the last week, the caller has noticed potholes that are approximately one foot in diameter. No damage has been caused to the caller's vehicle at this time.
- 12. The Request is now complete. Check the data and press the save button 📕 in the toolbar.
- 13. The Request Number, Status, and Status Date will be populated automatically in the header.
 - As you can see in the example below, the status has been set to "1 New Request".

🗑 Work Requests - Unnamed Filter Set	- • ×
▋▟▝▚▖▖▋▋▖▋▋Ҳ▓▎▎》▏▎▖▖▓ゐख़▋■₡▖▖▋◈▖▓▖	
Request # 2011-00003 Status 1 New Request Status Date 08/23/2011 • 10:43 PM	
Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Tracking Custom Comments	

Notes:

Duplicate Requests

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

- 1. Upon creating the initial request, the requester's name and information will be carried over from the Customer tab to create a record in the Requesters grid.
 - As you can see below, the Request we just created has a listing for George N. Thomas on the Requesters tab.

🗑 Work Requests - No Filter		×
	3 ng 🔜 🛋 🔍 💌 🧶 🔺 🎓	
Request # 2011-00003 Status 1 New Request Status	Status Date 08/23/2011 💌 10:43 PM	
Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Trac	acking Custom Comments	
Recorded By Invitson		
No of Requests 1 Recorded Date 08/23/2011 - 10:43 PM Last Reque	est Date 08/23/2011 💌 10:43 PM	
Requesters		
No / Phone # Date Received Name Name2	Business Address Home Phone # Work Phone	
1 685-7761 08/23/2011 George N Thomas	2765 E HOBA 685-7761	

- 2. Each time you receive a subsequent request for the same problem at that location, you should record it directly into this Requesters grid. This allows you to create a list of requesters calling about the same problem at the same address. This data is helpful in determining how many complaints have been received regarding this problem.
- 3. When a subsequent request is called in, you can begin filling out the request as usual on the Customer tab. When you reach the **Request tab**, use the **F7** function to search for existing requests. You'll see a dialog similar to the one below.
 - Find your request in the list, highlight it, and click *Select*.



• The *Requests* module will then open directly to the existing record you selected.

Notes:

1	On the Demucators tak	right alight and a	alast Add Deserd	The fellowing		
4	UN THE REQUESTERS TAD		ELECT AND RECORD	της τοποιλιής	1 \////////////////////////////////////	annear.
•••	On the Requesters tab	, right onor and 3	cicci nuu neccoru.	The following	1 **************	uppour.

Requesters						x
🖻 🔊 🔳 🗙						
Received By	rwilson	Date Received 08/24/20	11 💌 07:47 AM	Caller No	2	
Phone #			Util Acct #			
Name			Business 🚺 🗍			
Address				Apartment/9	Suite	
Reg Address 2						
Req City		Req State		Req Zip Code		
Req Country		Parcel Number				
Sub Division		Email				
Home Phone #		Work Phone #				
Phone 1		Phone 2				
						*
						-
F8 - search for Con	acts.		Reco	rd 0 of 1	Add Mode	Ready

- Enter the new requester's phone number, name, address, and contact information.
- This dialog is identical to the Customer tab. Like in the Customer tab, several fields in this window have special functions. You can use these fields to search for a customer by phone number or name and enter the customer's address.
- Once you save the record, a new listing will be added to the Requesters tab.
- Additionally, the top portion of the screen automatically documents when the last requester log was recorded and which user recorded it.

🗑 Work Requests - No Filter											
Request # 2011-00002 Status 1 New Request Status Date 08/23/2011 10:33 PM											
Customer Request Scripts Department/Utility Locates WO Custom	Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Tracking Custom Comments										
Recorded By rwilson											
No of Requests 2 Recorded Date 08/23/2011 - 1	0:33 PM Last	Request Date 08/23/2011 💌	10:33 PM]							
Requesters											
No / Phone # Date Received Name	Name2	Business	Address	Home Phone #	Work Phone						
1 685-7761 08/23/2011 George N	Thomas		2765 E HOBA	685-7761							
2 685-7761 08/24/2011 George N	Thomas		2765 E HOBA	685-7761							

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 appear asking if you want to create a work order. Click *Yes* to continue.



2. The new work order will contain all of the Request information (but not Customer information), and will have an automatically assigned Work Order number.

🕍 Work Orders - No Filter	
	()))) ∮ ∅ ㎏ 및 ■ ℚ ▼ ⊘ ▼ ≧
Work Order # 2011-00384 Categ	jory 12320 Pavements
Status 2 New Work Order Probl	em STRDPH Pothole Repair
Status Date 08/24/2011 💌 07:53 AM Main T	ask
WO Location Assets List/Events Tasks/Res Routing Costs Billin	ng Related Requests/Track Links Custom 1 Custom 2 Comments
Asset Location 2765 E HOBART ST Your Town	Comment From Request Caller has noticed potholes on Hobart between the 2500 and 2800 blocks
Cause Assigned Crew	
Supervisor 129 JASON WRIGHT	Assigned By
Lead Worker	Assigned Date / / 💌 : AM Override Notifications
Priority	Start Date / / 💌 : AM Problem
Account #	End Date 7 / 💌 : AM Overdue
Proj No - Acct	Lead Worker
Project Text	Master Project ID Task
Reason	Name Supervisor
	Record 3252 of 3252 View Mode Ready

• As you can see in this example, the new work order includes the Category (Pavements), Problem (Pothole Repair), Location (2765 E. Hobart St.), and Request Comments for Work Order that we entered into the sample *Requests* record above.

 Note: You may have the "Work Orders Lite" module pop up instead of Standard "Work Orders". To select which version of Work Orders opens by default, go to System>>Configuration>>Program Options and choose the default work order module from the drop-down list on the General tab.

Program Option	ns		X								
Colors General	Notifications Wallpaper	Documents	Locate Vindows								
🔲 Continu	ous <u>a</u> dd mode										
✓ <u>F</u> loating	Eloating definition for field controls										
Default <u>W</u> or	k Module to Open	Work Order Lite	•								
	OK	Cancel									

- 4. Now that you've created a Work Order from the Request, the Request will take care of itself.
 - Look back at the Request; the Status has been changed automatically to "2 Assigned to Work Order".

🗑 Work Requests - No Filter	
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Request # 2011-00002 Status 2 Assigned to WD Status Date 08/24/2011 V 07:53 AM	
Customer Request Scripts Department/Utility Locates WD Custom Notification Requesters Tracking Custom Comments	

5. On the **Tracking** tab, information about the Request's history is automatically recorded. Here, you can see the date the Request was originally created and when the work order was generated.

Work Requests - N	No Filter								- • •
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Request #	2011-00002	St	atus 2 Ass	igned to W0	Status Date 08/24,	/2011 💌 07:53	AM		
Customer Request	Scripts Dep	partment/Utility Loc	ates WO Custom M	Notification Requesters [Tracking Custom Com	ments			
Linked Requests Request # /	Status Text	Cat	egory Text	Problem Text	Cause Text				T
Linked Work Orders	\$								
Start Date ⊽	End Date	Work Order #	Status Text	Main Task Text	Supervisor Text	Assigne	ed Crew Text		
		2011-00384	New Work Order		JASON WRIGHT				
Request Tracking –									
	Tra	cked Item 🛆		Desc	ription	Ву	Date	Time	
Request Creation Work Order Created			Work Order 2011-0038	rwilson rwilson	08/23/2011 08/24/2011	10:33 PM 07:53 AM			

• To access a generated work order, simply double click on a listing in the grid. You can close the work order by setting its status to "999 - Complete".

6. When the Work Order is closed, the status of the Request will automatically change to "998 - WO Completed". The Tracking tab will show when this change occurred.

Work Requests -	No Filter							
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Request #	2011-00002	Status 998 WD	Completed	Status Date 08/24	/2011 💌 08:51	AM		
Customer Reque	st Scripts Depar	tment/Utility Locates WO Custom N	lotification Requesters	Tracking Custom Com	ments			
 Linked Requests 								
Request # 🛆	Status Text	Category Text	Problem Text	Cause Text				
Linked Work Orde	End Date V	Vork Order # / Status Text	Main Task Text	Supervisor Text	Assigne	ed Crew Text		
08/24/2011	08/24/2011 20	11-00384 Complete		JASON WRIGHT				
Request Tracking							-	
	Track	ed Item 🛆	Desc	cription	By	Date	Time	
Request Creatio	n				rwilson	08/23/2011	10:33 PM	
Status Change			From Assigned to WO t	o WO Completed	rwilson	08/24/2011	08:51 AM	
Work Urder Crea	ated		Work Urder 2011-0038	rwilson	08/24/2011	07:53 AM		

Linking a Work Order

To link a work order with the current request, complete the following steps:

- 1. Right click in the Linked Work Orders grid of the Tracking tab and select *Associate Work Orders With*. The following drop-down menu will appear:
- 2. Select the characteristic(s) that you want the linked work order and request to have in common. Your choices are as follows:
 - Same Problem Allows you to link any or all work orders that have the same problem as your request.
 - Same Infrastructure Allows you to link any or all work orders that have the same affected asset as the request.
 - Same Problem and Infrastructure Allows you to link any or all work orders that have the same problem and affected asset as the request.
 - Street Block Allows you to link any or all work orders with a street address within a street block of the problem's location in the current request.
 - Work Order Number A dialog will appear prompting you to enter the number of the work order you wish to link to the current request.
 - Any Incomplete Work Order You will see a list of all incomplete work orders to select from.

3. For our example below, we've chosen to link work orders within the same street block. We've then chosen two work orders within the Pavements category, both related to pothole repair.

Work Order #	Category	Categorya	Main Task	Main Task Text	Status Text	Status Date	Start Date	Supervisor	Supervisor Text	Problem	Problem Text	Cause	Cause Text		Selec
2006-03507	41200	Hydranta		10	New Work Order	12/18/2006		C8A	George Butler					-	St
2008-03507	41200	Hydrants			New Work Order	12/18/2006		C8A	George Butler						Close
2008-03507	41200	Hydranita			New Work Order	12/18/2006		GBA	George Butler						-
2008-03507	41200	Hydrants			New Work Order	12/18/2008		C8A	George Buller						
2008-03507	41200	Hydranits			New Work Order	12/18/2008		GBA	George Butter						
2008-02718	12550	Median			New Work Order	11/28/2006		143	TRAVIS SOX	STMSC	Miscellaneous				
2008-02574	12550	Median			New Work Order	11/16/2006		143	TRAVIS SOX	STMSC	Miscelaneous				
2007-01734	41320	Meter Boxes			New Work Order	08/15/2007		GBA	George Butler						
2011-0034F7	12320	Pavements.			New Work Order	07/28/2011			- 208 833 Cl						
					New Work Order										
2007-01489	41350	Service Taps	WTDSLD6	Service Line Disconnect	New Work Order	02/06/2007	02/06/2007	105	COREY COLA					_	
2007-01591	41350	Service Taps	WTDSLRPR	Service Line Repair	New Work Order	02/09/2007	02/09/2007	105	COREY COLA						
2011-00366	21100	Sewer Manhole	WWCEQFMN	Flow Monitoring	New Work Order	07/22/2011		87	SHELA KAMDON						
2011-00380	21100	Sewer Manhole			New Work Order	08/22/2011									
2011-00302	21100	Sewer Manhole			New Work Order	00/23/2011		05	MARIO VINCE					118	
2011-00383	21100	Server Manhole			New Work Order	00/23/2011		85	MARIO VINCE					100	
2011-00383	21100	Sewer Manhole			New Work Order	00/23/2011		45	MARIO VINCE					-	

4. After associating the work orders, both the Linked Work Orders and Request Tracking grids have been updated. You'll see the Work Orders listed by number and the action, Associate WO & Request, identified in the bottom grid

	Work Requests -	- No Filter								- • ×
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C	Request # Customer Reque	2011-00003 st Scripts Dep			signed to WO Notification Requesters T		/2011 💌 10:43 ments	PM		1
	Linked Requests		-							
	Request # 🛆	Status Text	Cat	egory Text	Problem Text	Cause Text				
	Linked Work Orde									
	Start Date	End Date	Work Order # 🛆	Status Text	Main Task Text	Supervisor Text	Assigne	d Crew Text		
		2	006-02288 011-00367	New Work Order New Work Order		JASON WRIGHT				
1	Request Tracking)								
		Trac	ked Item ∧		Descrip	otion	By	Date	Time	
	Associate W0 &	Request			Work Order 2011-00367		rwilson	08/24/2011	09:14 AM	
	Associate W0 &				Work Order 2006-02288		rwilson	08/24/2011	09:14 AM	
Ш	Request Creatio						rwilson	08/23/2011	10:43 PM	
l	Status Change			From New Request to As	rwilson	08/24/2011	09:14 AM	J		

Associating Work Orders with Requests

Several functions in the *Work Orders* module allow you to associate your current work order with an existing request. These options are very similar to the ones we just discussed in the *Requests* module.

- 1. On the Requests/Tracking tab of the Work Order, right click in the Requests grid and select Associate Work Request with. The following menu will appear.
 - Note that individual options are disabled if the work order does not contain the necessary data. For example, you will be unable to associate a request with the same problem if there is no problem identified in the work order.

🖼 Work Orders - Sewer - Not Complete						
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Work Order # 2006-01608	Catego	ory	1200	Sewer Pipe		
		·	1200	sewer ripe		
Status 2 New Work Order	Proble	em 📗				
Status Date 07/06/2006 💌 08:24 AM	Main T	ask 📗 🕠	/WCSM03	Sewer Line	Cleaning	
WO Location Assets List/Events Tasks/Res Routi	al Costs Billin	n Belated	Requests/Tra	ack Links	Custom 1 Custom 2	Comments
				Linto		
Requests						
Request # A Problem Text Location	n Address	Loc City	No of Rec	quests	Recorded Date	Last Reque:
	Arrocia	te Work Requ	unct with		Same Problem	
	Associa	ite work kequ	iest with	_	Same Infrastructure	
•				_	Same problem and In	fractructura
Tracking					Street Block	frastructure
Tracked Item			Desci	ription		
Work Order Created		from GIS	Desci	npuor	Incomplete Request	
Supervisor Change			NDO JUDD		Work Request Numbe	
Delete AssetID Delete AssetID			set 126676-1 set 126668-1		GBA GBA	0
Delete AssetID			set 126665 1		GBA	0 -
· · · · · · · · · · · · · · · · · · ·						4
			[Record 1 o	of 18 View Moo	de Ready

- 2. Select the characteristic(s) that you want the linked work order and request to have in common. Your choices are as follows:
 - Same Problem Allows you to link any or all requests that have the same problem as your work order
 - Same Infrastructure Allows you to link any or all requests that have the same affected asset as the work order.
 - Same Problem and Infrastructure Allows you to link any or all requests that have the same problem and affected asset as the work order.
 - Street Block Allows you to link any or all requests with a street address within a street block of the problem's location in the current work order.
 - Incomplete Requests You will see a list of all incomplete requests to select from.
 - **Request Number** A dialog will appear prompting you to enter the number of the request you wish to link to the current work order.
- 3. Just as you saw in the *Requests* module, the Requests grid in the Work Order will be updated after you have selected the associated records. You'll see the Requests listed by number, problem, location, and other identifying information in the grid.