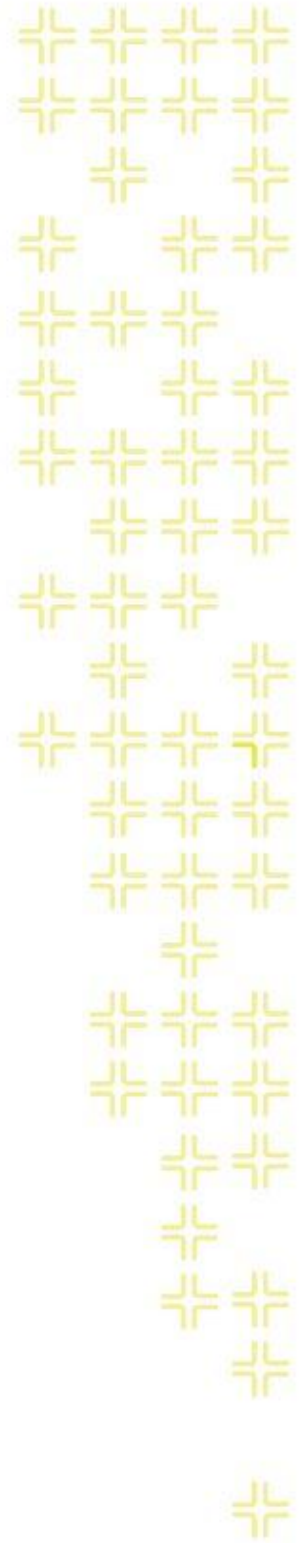




TRAINING GUIDE

# Work Flow Setup Desktop



# Work Flow Setup - Desktop

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The Lucy suite offers you a comprehensive solution for Work Management. The *Work* module allows 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 order for your employees to use these features, you as an administrator will need to perform the one-time setup actions listed in this workbook. You'll need to set up other aspects of your work flow in order to fully utilize the *Work* module; however, this workbook will give you a basic introduction. For additional information, consult the Lucy help guide.

First, we'll begin by discussing the work flow setup. We'll show you how to set up categories, create resource records, create work crews, enter problems, and establish work tasks. Then, we'll move on to notifications. Notifications are used to inform customers of their request's status as well as notify employees when a work order has been assigned to them or has become overdue. In this workbook, we'll show you how to create notification templates, set default notifications, and override notifications.

Finally, we'll show you how to set up *Work Options* and *General Options* for *Work Orders* and *Requests*. These options allow you to determine how your employees will enter various types of data into the *Work* modules.

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## Work Flow Setup

To get started using the *Work* module, you need to establish the work flow. This will help you coordinate your agency or department's unique terminology, functions, and procedures. You can associate actions with resulting tasks, assign crews to specific resources (employees, equipment, and materials), establish unit costs for resource expenses, document employees' training and certifications, and track resources.

The following modules are available to help you structure your work:

- Categories
- Employees
- Certifications
- Crews
- Contractors
- Equipment
- Materials
- Fluids
- Work Tasks
- Problems
- Causes
- Classification
- Exclusion Days

Notifications used to be part of the Work Flow Setup, but have now been moved to the general menu. However, Notifications are still important to the Work Flow setup so they will be discussed here.

### *Getting Started*

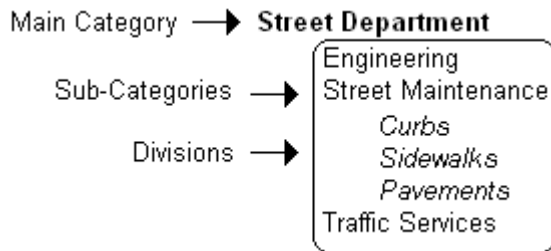
Before using the work flow setup modules listed above, we recommend creating an outline to help you better organize your infrastructure.

1. Identify all main departments such as Water, Sewer, Street, Administrative, etc.
2. Identify all employees, contractors, equipment, materials, and fluids and determine unit costs per hour. If available, include the appropriate ID numbers.
3. Create a list of all tasks or actions performed by each department.
4. Create a list of all problems encountered that require work for each department.
  - Problems refer to instances that generate work, such as potholes, sewer odor, etc.
5. Create a list of all causes that trigger work orders for each department.
  - Causes refer to what created the problem, such as weather, vandalism, etc.

Upon compiling your lists you will need to eliminate any duplicates. For instance, one department may label a cause 'Storm' while another department labels a cause 'Severe Weather'. Both departments refer to the same type of cause, but have given that cause different labels. You will need to decide which label to use.

## Categories

First, you'll need to define the main categories found in your infrastructure. We recommend making each department a category. You may want to define more specific categories within your main categories. For example, Street Department is a main category while Engineering, Street Maintenance, and Traffic Services are all sub-categories of that main category. You may wish to go into even more detail by defining the divisions within a sub-category. For example, Curbs, Sidewalks, and Pavements are divisions of the Street Maintenance sub-category. You can add as many sub-categories as needed, but be aware that the more you create, the more complicated your system will become



Next, you can group your resources (employees, equipment, materials, etc.) under the appropriate category or sub-category. For example, you may group street maintenance equipment, materials, tasks, problems, possible causes, and Street Department employees under the Street Maintenance sub-category.

Note that you can group assets under more than one category. For instance, you may have employees who work for more than one department, or equipment that is used by every department.

**Notes:** \_\_\_\_\_

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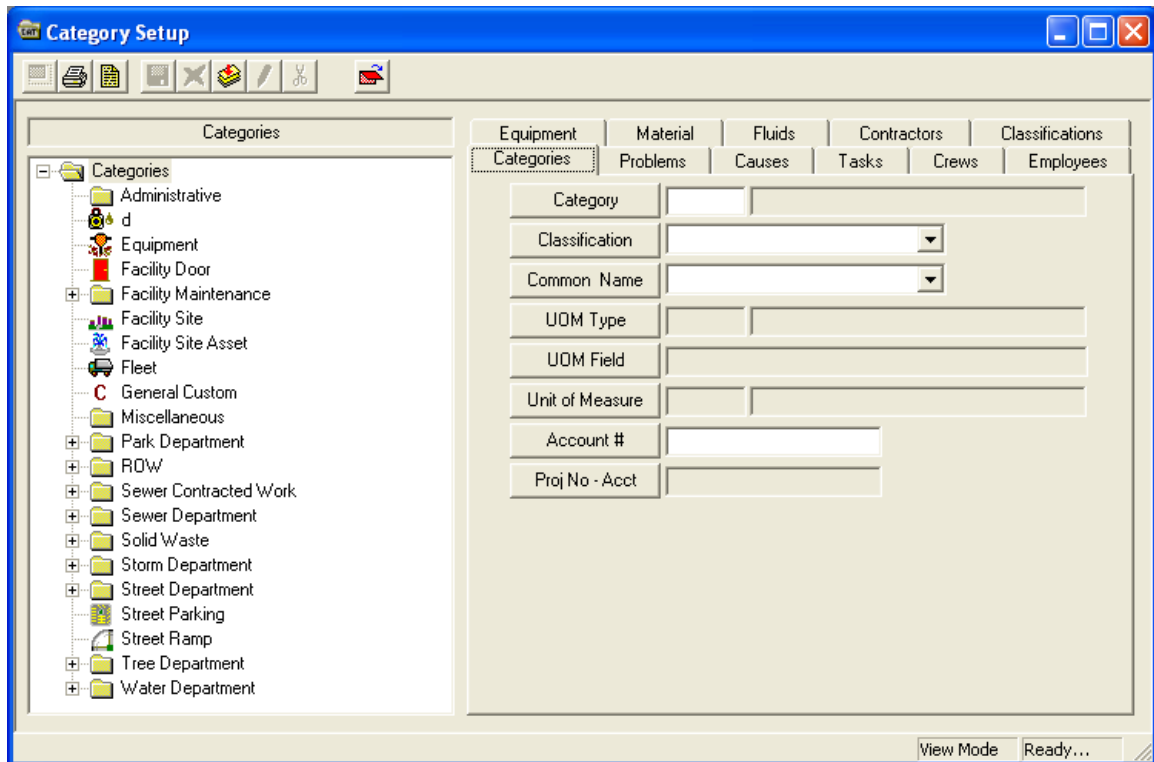
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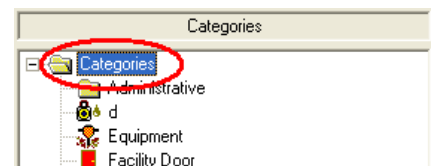
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## Adding Categories or Sub-Categories

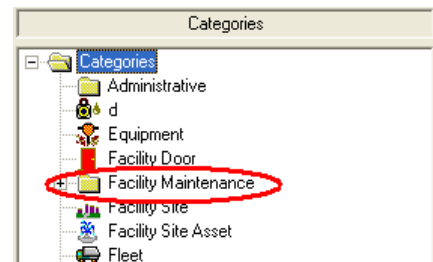
1. Open the *Categories* module by selecting **Work>>Work Flow Setup>>Categories** from the desktop application main menu.




2. To add a **Category**, highlight the 'Categories' branch in left-hand window. This folder appears at the top of the list.



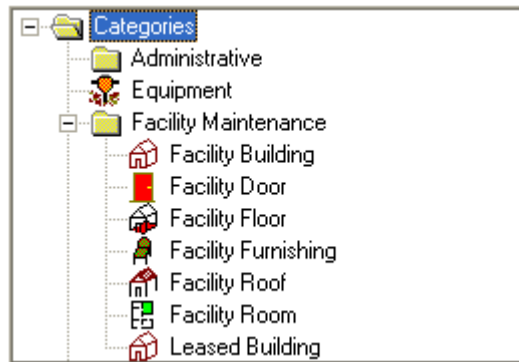
3. To add a **Sub-Category**, highlight the existing category you wish to be associated with the new sub-category.




4. Click Add  on the module toolbar.
5. Create a Category name by entering a unique code and description. This will be used in the Category pick list throughout the *Work* modules.
  - In the example below, we've named the category "Facility Maintenance"

Category	4000	Facility Maintenance
----------	------	----------------------


6. Select a Classification from the drop-down menu.
  - If you select “Inventory Item”, the Common Name field will be enabled and you will be required to populate it.
  - If you select “Classification”, the Common Name and the three Unit of Measure fields will remain inaccessible.
7. Select a common name from the drop-down menu. This links an asset to the category and enables work orders to pull quantity information from the module that houses that asset.
  - Upon selecting a common name for an asset, an icon will appear next to that asset in the category tree.
  - For example, in the Facility Maintenance category below, we’ve included the following common name assets:
    - Facility Building, Facility Door, Facility Floor, Facility Furnishing, Facility Roof, Facility Room, and Leased Building.

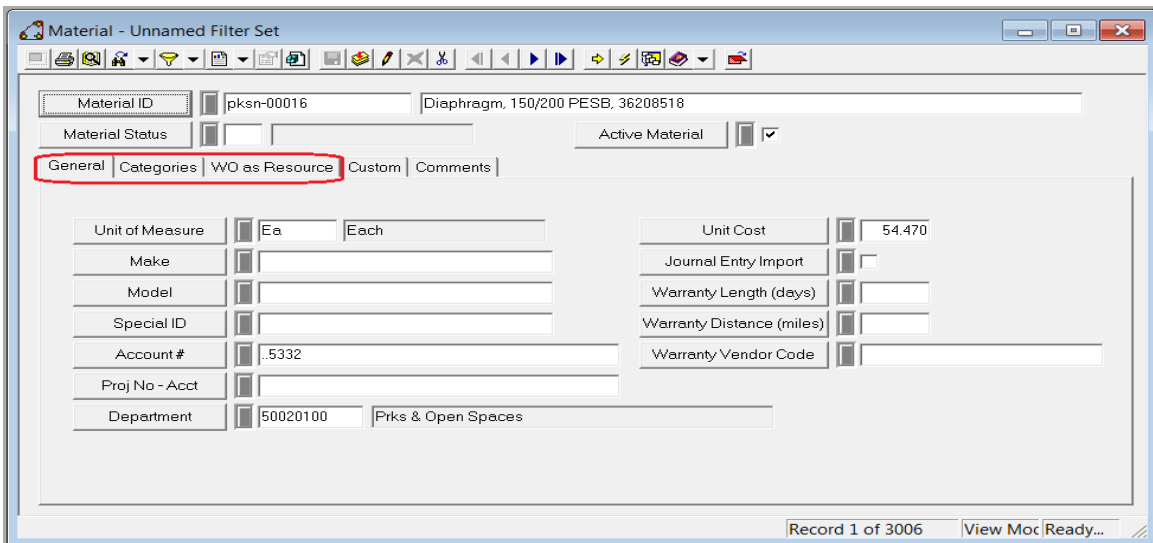


8. Select the UOM (Unit of Measure) Type from the pick list.
  - If you select “count”, the Quantity field in the *Work Orders* module will count the number of like assets associated with that work order.
  - If you select “sum”, the Quantity field will add the total measurements of the like assets.
9. Enter the field you want the system to sum in the UOM field. If you chose “count”, you can leave this field vacant.
10. Select the unit of measure from the pick list.
  - For example, these include hours, each, gallons, feet, etc.
11. Enter any default account or project numbers you want auto-populated in a work order when this category is selected.
12. Save  your new category.

## Resources

As the next step in work flow setup, we'll go over how to create resource records. Resources include the employees, contractors, equipment, materials, and fluids needed to complete work orders. Each time you add a resource record, the resource will be added to the appropriate pick list (Employees, Fluids, Materials, etc.). These pick lists are available throughout the *Work* module. Individual work flow setup modules are available for each resource type; however, the steps to add a record and the functions in each module are similar. In this section, we'll go over the *Materials* setup module as an example.

1. Open the resource modules by selecting from the menu Work>>Work Flow Setup>>Employees, Contractors, Equipment, Materials, or Fluids.
2. Click the Add button  on the toolbar to enter Add Mode.
3. While each resource module tracks information specific to the resource type, all of the resource modules contain a header with identification information plus the following three critical tabs:
  - **General** - Containing general information about the resource.
  - **Categories** - Indicating what Categories the resource is associated with.
  - **WO as Resource** - Listing all work orders where the resource has been assigned.



Material - Unnamed Filter Set

Material ID: pksn-00016 Diaphragm, 150/200 PESB, 36208518

Material Status: Active Material ☒

General | Categories | **WO as Resource** | Custom | Comments

Unit of Measure	Ea	Each	Unit Cost	54.470
Make			Journal Entry Import	<input type="checkbox"/>
Model			Warranty Length (days)	
Special ID			Warranty Distance (miles)	
Account #	.5332		Warranty Vendor Code	
Proj No - Acct				
Department	50020100	Prks & Open Spaces		

Record 1 of 3006 View Moc Ready...

#### 4. Header Information

- Enter a **Material ID**. This is required; it allows you to identify the resource you'll be entering. This same ID type appears in the other resource modules.
  - In our example, we've created a Material ID of 215 for 10 inch PVC pipes.
- Indicate whether the resource is active using the check-box provided.

*Note: If marked, the resource will be designated as active and will appear in the Work Order's pick list for this resource type. If this box is not marked, the resource will not be available for selection.*

The screenshot shows the 'Material - No Filter' window. The 'Material ID' field is highlighted with a red box and contains the value '215'. The description field contains '10 In PVC SCH 40 Pipe'. The 'Active Material' checkbox is also highlighted with a red box and is checked. The 'General' tab is selected at the bottom.

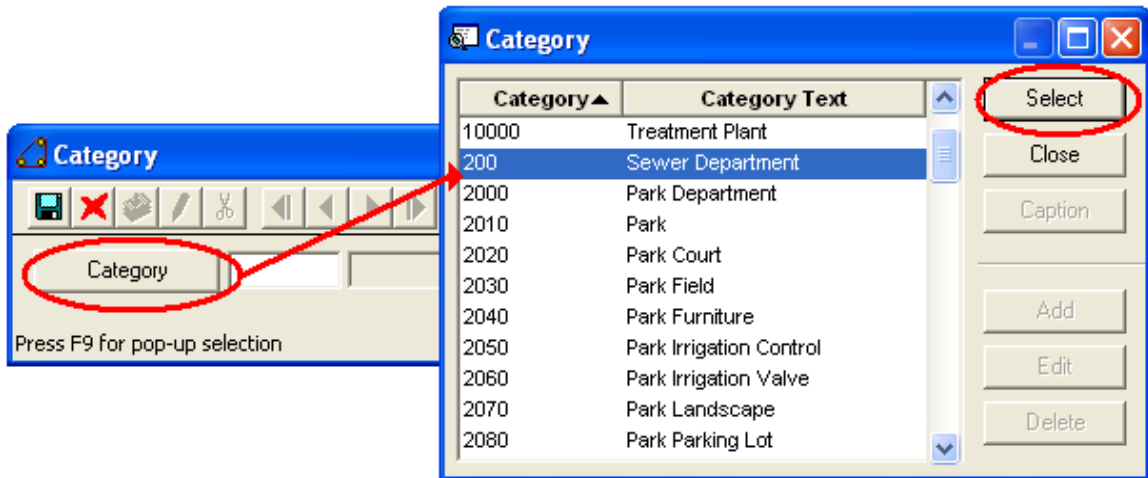
#### 5. First Tab: General


- This tab allows you to enter specific information about each resource. The Unit of Measure and Unit Cost fields are present in each of the resource modules.
  - The data in the Unit of Measure and Unit Cost fields is automatically carried over to the work order when the resource is selected.
  - Below, we've entered Feet as the Unit of Measure and a Unit Cost of \$5.43. This means that each foot of 10 inch PVC pipe costs \$5.43.
- The Department field is also present throughout the resource modules. This allows you to track which department the resource is associated with.
  - For our example, we've associated this material with the Sewer Department.
  - Additionally, Warranty information is tracked on the General Tab

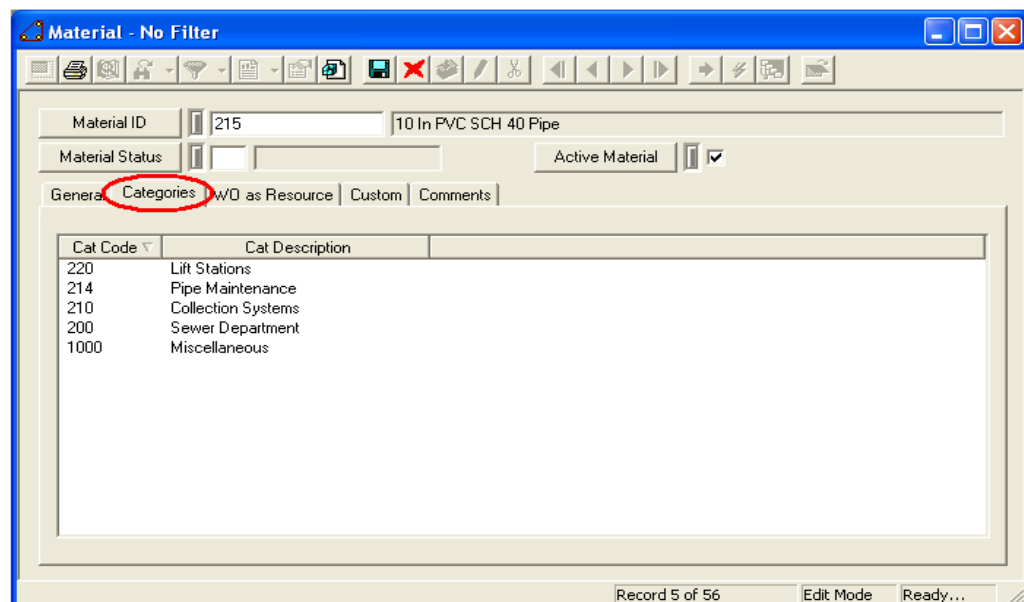
The screenshot shows the 'Material - Unnamed Filter Set' window, General tab. The 'Material ID' is 'pksn-00016' and the description is 'Diaphragm, 150/200 PESB, 36208518'. The 'Unit of Measure' is set to 'Ea' (Each) and the 'Unit Cost' is \$54.470. The 'Department' is set to '50020100 Prks & Open Spaces'. The 'Active Material' checkbox is checked. The 'General' tab is selected at the bottom.

## 6. Next Tab: Categories

- Use this tab to associate categories with the resource. When a Category is chosen in *Work Orders*, the available resources are limited to those associated with that Category.
- To add a category, open the **Categories** tab. Then, right click in the grid and select *Add Record*. A new form will open allowing you to enter a category.

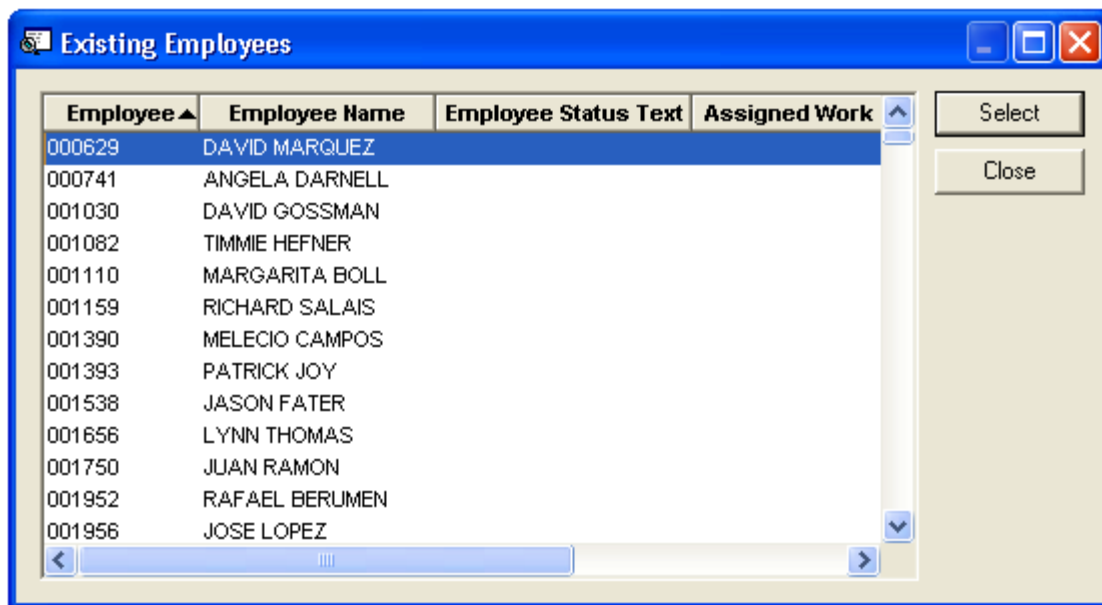


- Click on the Category button to access the pick list. This list comes from the *Work Flow Setup, Categories* module that we discussed earlier.
- Highlight a category in the list and click *Select*. Then, click  to save the record. The new category will be added to the grid.
  - As you can see in the example below, we've associated our 10 inch PVC pipe with Lift Stations, Pipe Maintenance, Collections Systems, Sewer Department, and Miscellaneous Categories.



Note that the *Categories* tab in the *Work Flow Setup, Employees* module contains a unique function allowing you to replicate employee's category links. Many employees in a department may need access to the same categories of work. While you can associate categories to *Employee* resources in the same manner that you associated categories to the *Material* resource above, this additional function helps to simplify the process of assigning multiple categories to a single employee.

- In the *Employees* module, right click in the *Categories* grid and select "Replicate Employee's Category Links".
- A window listing all employees in the *Work Flow Setup, Employees* module will appear:



- Highlight an employee listing and click *Select*.
- All categories associated with the selected employee will now also be associated with the current *Employee* record.
- You can repeat this process if an employee shares category assignments with more than one other work employee. You can then add or delete individual categories as needed by using the additional right click options in the grid.

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7. Next Tab: WO as Resource

- This tab lists all of the work orders where the resource has been used. This includes incomplete and completed work orders. At a glance, you can see the Work Order #, Main Task, Category, Resource Start/End Dates, and Units Used.

**Material - No Filter**

Material ID: 215 | 10 In PVC SCH 40 Pipe

Material Status: | Active Material: ☒

General | Categories: **WO as Resource** | Custom | Comments

Res End Date ▲	Units	Task Text	Work Order #	Category Text
	7.00	Sanitary Stoppage	07-000067	Lift Stations
	3.00	Backup-Infiltration	07-000068	Pipe Maintenance

Record 5 of 56 | View Mode | Ready...

Notes: \_\_\_\_\_

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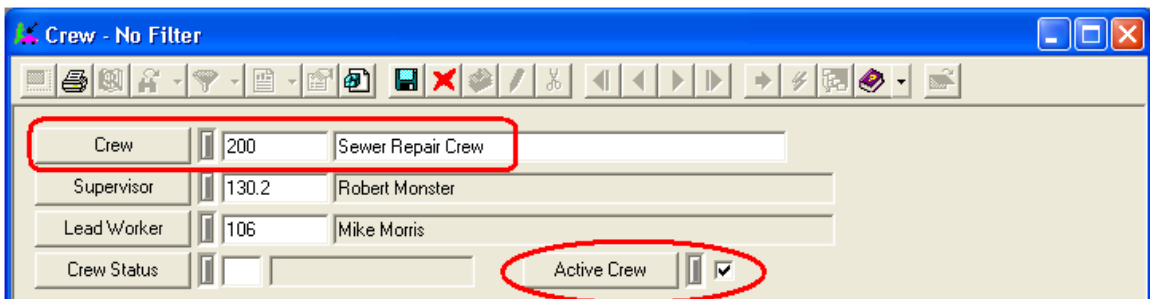
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## Crews

The next *Work Flow Setup* module we'll discuss is the *Crew* module. Crews are another type of work resource. This module allows you to select a group of employees and include them as resources in a crew. In addition, you'll also be able to associate resources from the *Equipment*, *Materials*, and *Fluids* setup modules. This expedites data entry when creating a work order as it allows you to enter the crew numerical code instead of entering each individual employee, supervisor, and resource. When the crew code is entered into a work order, all associated employee and resource information will be automatically populated.

1. Open **Work>>Work Flow Setup>>Crews** from the desktop application main menu.
2. Click the *Add* button  to enter a new record.
3. You'll generally include information in the following critical areas:
  - **Header** - Includes crew numerical code and name, supervisor, and lead worker.
  - **Resources** - Allows you to include resources from the *Work Flow Setup* modules.
  - **Categories** - Allows you to associate your crew with multiple work categories. You'll associate Categories with your crew in the same manner as you associated Categories with your *Material* record above.
4. Header Information
  - Create a unique code and name to identify your work crew. This is required. Be certain to pick something recognizable as you'll select this crew from a pick list in the *Work Order* module.
    - In our example below, we've created a Sewer Repair Crew.
  - Select a Supervisor and Lead Work from the pick lists. These lists come from the *Work Flow Setup, Employees* module.
  - Indicate whether the crew is active using the check-box provided.

*Note: If marked, the crew will be designated as active and will appear in the Work Orders module pick lists. If this box is not marked, the crew will not be available for selection.*



Crew	200	Sewer Repair Crew
Supervisor	130.2	Robert Monster
Lead Worker	106	Mike Morris
Crew Status		Active Crew <input checked="" type="checkbox"/>

5. Next, in the **Resources grid**, you can associate multiple resources with your work crew. These can include Employees, Equipment, Materials, Fluids, and Contractors
- Right click in the grid and select *Add Record*. The dialog shown below will appear.
  - Select a Resource Type from the pick list. In our example, we've selected *Materials*.
  - Select an individual Resource from the pick list. This list will be limited by the Resource Type you selected in the previous field. For our example, we've selected the 10 inch PVC pipe that we created in the previous example.
  - Continue selecting additional resources as needed. Here, we've included two employees, a flush truck, and the PVC pipe.

The screenshot shows the 'Crew - No Filter' dialog box. The 'Resources' tab is selected and circled in red. The Resources grid contains the following data:

Resource Type	Resource Type Text	Resource	Resource Text
1	Employee	185	Jim Jester
1	Employee	130	Robert Monster
2	Equipment	200	1990 IHC Flush Truck

The 'Resources' dialog box is open, showing the 'Resource Type' as '3 Material' and the 'Resource' as '215 10 In PVC SCH 40 Pipe'. The dialog also includes a toolbar, a status bar, and buttons for 'Add Mode' and 'Ready...'.

Notes: \_\_\_\_\_

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- After you've saved your *Crew* record, you'll be able to select this crew in the *Work Orders* module, Task grid.

Work Order Tasks

Task: WWCPRPR Sewer Line Break Repair

Task Crew: 21001 Sewer Repair Crew

Task Supervisor: 87 SHIELA KAMDON

Task Start Date: / / : AM Class: Hours: Seq No: 3

Task End Date: / / : AM

Status: Account #: Proj No - Acct: Unit of Measure: ea Each Unit Cost: # of Units: Calc'd Unit Cost: Task User 7: Task User 8: Task User 9: Task User 3: Address:

Labor Hours: Actual: Estimated: Difference: Labor Costs: Parts Cost: Fluids Cost: Equipment Costs: Contractor Costs: Misc. Costs: Total Cost: Lock Task Units: Units Calc Method: User Date 1: / / : AM User Date 2: / / : AM User Date 3: / / : AM User Date 4: / / : AM

Record 0 of 2 Add Mod Ready...

- As you can see below, all of the resources (Employees, Equipment, and Material) that were associated with our Sewer Repair Crew have been automatically entered by the system into the *Work Order* module's Resources grid.

Work Orders - No Filter

Work Order #: 2006-01128 Category: 21000 Sewer Collection

Status: 2 New Work Order Problem: Main Task: WWQC00 Waste Water Quality Commercial

Status Date: 06/03/2014 01:17 PM

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

Work Tasks

No.	Task Text	Task Start Date	Task End Date	Status Text	UOM	Calc'd Unit Cost	#
1	Waste Water Quality Commercial				Each	0.00	
2	Waste Water Quality Commercial				Each	1.00	
3	Sewer Line Break Repair				Each	0.00	

Resources

Group	Type	Resource	Resource Text	UOM	Units	Cost
Employee	280	CLAY HAGGARD		Hours	0.00	0.00
Employee	123	COREY BROWN		Hours	0.00	0.00
Employee	111	KELLY CARLSON		Hours	0.00	0.00

Record 1 of 3318 View Mod Ready...

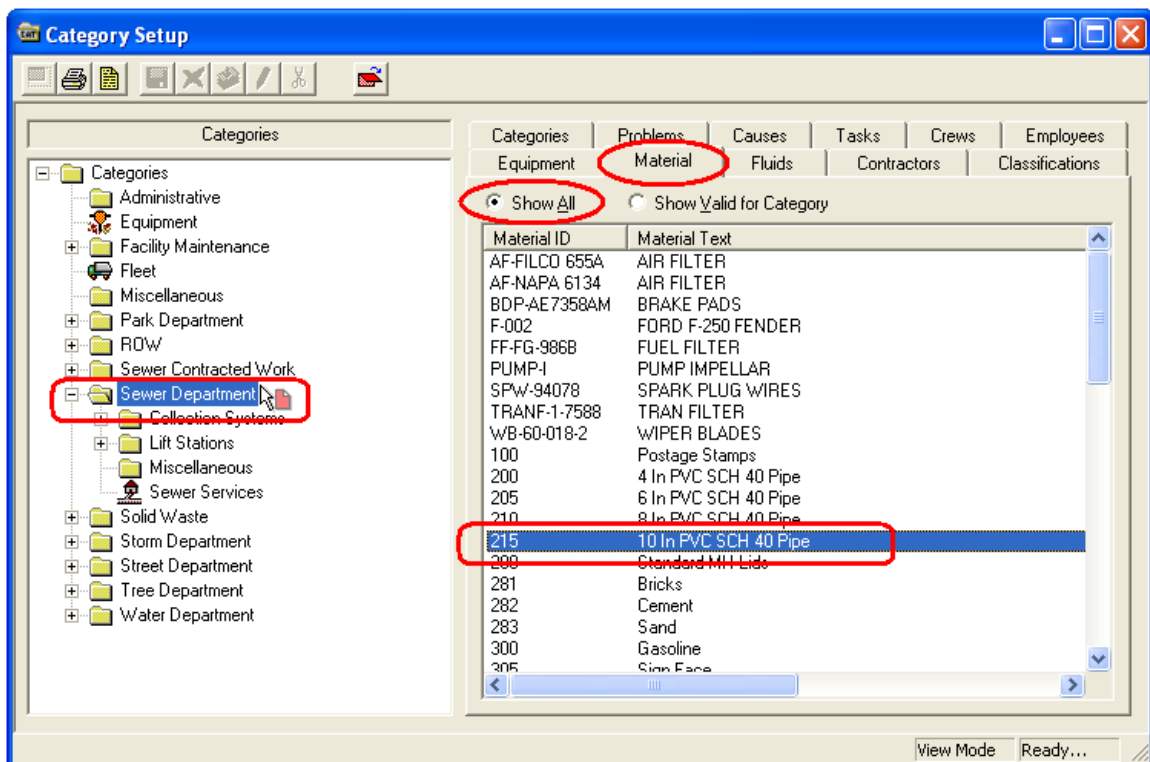
## Associating Resources

Once you have created categories and sub-categories, you can begin associating resources from the other setup modules (*Equipment, Materials, Tasks, Employees, Crews, etc.*). Associating resources with a category enables the *Work* module to automatically populate resource data when a category is selected in a work order or request. To associate a resource with a category, complete the following steps:

1. Select the appropriate resource tab. For example, if you want to associate a material with a category, you would select the *Material* tab.
2. Click on the 'Show All' button to reveal a list of all resources included in the *Material* setup module.
3. Highlight a resource. Using your cursor, 'drag' the resource over to the left-hand window and 'drop' it into the category.


**Note that the resource will be automatically associated with that category and all sub-categories.**

4. You can associate as many resources as needed with your categories. Also, each resource can be associated with more than one category.



In our example above, we've associated the material we created earlier, 10 Inch PVC Pipe, with the Sewer Department category.

In this next *Work Flow Setup* step, we'll discuss how to create records for problems that result in work orders. All of the records that you enter into the *Problems* module will be added to the pick list used throughout the *Work* module. When you select a problem from the list in *Work Orders*, the default information, scripts, and notifications will also be carried over.

1. Open **Work>>Work Flow Setup>>Problems** from the desktop application main menu.
2. Click the *Add* button  to enter a new record.
3. You'll generally include information in the following critical areas:
  - **Default Data** - Data that will be carried over to the work order.
  - **Problem Scripts** - Includes questions to be asked of the customer calling in a request.
  - **Categories tab** - Associates a category with a problem. This limits the problems available when a category is chosen in the *Work Orders* module.

## Work Flow Setup

#### 4. Header Information

- Enter a **Problem ID**. This is required; it allows you to identify the problem you'll be recording.
  - In our example, we've created a problem for Overflow.
- Indicate whether the problem is active using the check-box provided.

*Note: If marked, the problem will be designated as active and will appear in the Problem pick list for work orders. If this box is not marked, the problem will not be available for selection.*
- Selecting the WO Enable, PM Enable and Req Enable check boxes further identifies what modules the problem will be selectable in.

Problem - Unnamed Filter Set

Problem: WWCMHOVR Overflow

Problem Status: [ ]

Active Problem: ☒

311 Problem: ☐

WO Enable: ☒ PM Enable: ☒ Req Enable: ☒

6. Defaults Tab allows you to enter default information that will be carried over to a work order anytime this problem is selected. This includes a default task, department, supervisor, priority, overdue days, and overdue notifications.
  - In our example below, we've entered the following default information:
  - Default Task - Sewer Overflow. This will be performed by the work crew.
  - Department - Waste Water Collections
  - Supervisor - Sheila Kamdon
  - Priority - Immediate Priority
7. You can also use the check-boxes at the right-hand side of the tab to indicate whether customer email notifications will be sent.
8. If the Cust Thank You box is marked, the customer submitting a request with this problem will be sent an email when the request is saved.
9. If the Cust Completed box is marked, the customer who submitted the request will receive a completion email when the work order is closed.

Problem - No Filter

Problem: WWCMHOVR Overflow

Problem Status: [ ]

Active Problem: ☒

311 Problem: ☐

WO Enable: ☒ PM Enable: ☒ Req Enable: ☒

Defaults | Notifications | Categories | Knowledge Base Info

Default Task: Sewer Overflow

Category: [ ]

Department: 41070200 Waste Water Collection

Division: [ ]

Supervisor: 87 SHEILA KAMDON

Priority: 1 Immediate Priority

Overdue Days: 2

Overdue Notif: Sewer Stoppage Overdue

Cust Thank You: ☒ Cust Completed: ☒

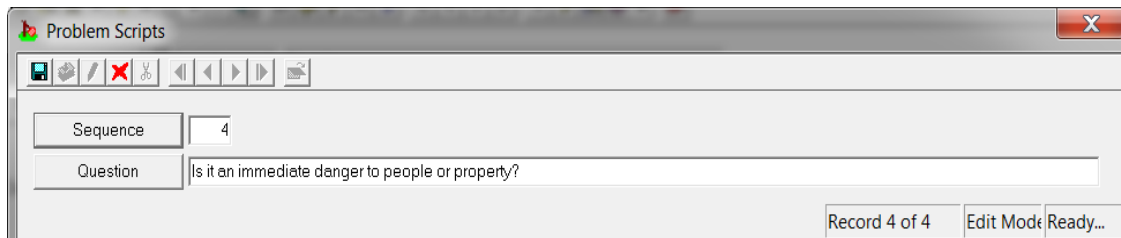
Problem Scripts

Sequence	Question
1	When did the overflow start?
2	Is it still overflowing at this time?
3	How many Gallons a minute would you estimate the fl...
4	Is it an immediate danger to people or property?

Record 236 of 304 View More Ready...

## 5. Problem Scripts

- The Problem Scripts grid allows you to create a list of questions to ask customers when they call in to report a problem.
- To enter a script, right click in the grid and select *Add Record*. The Problem Scripts dialog will appear.




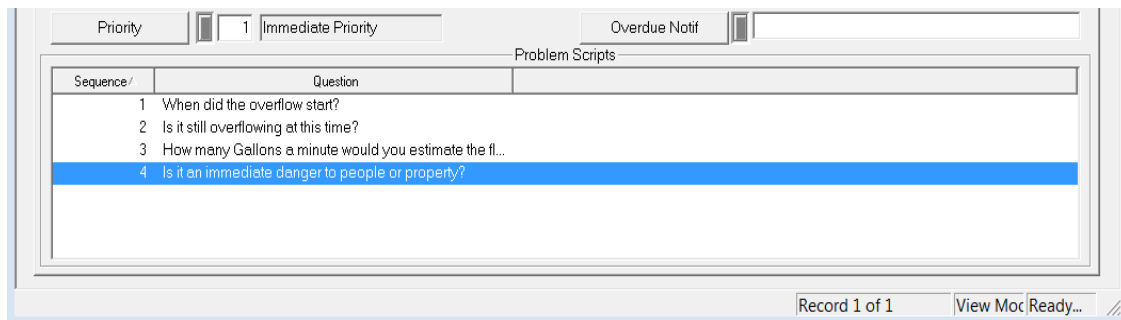
Problem Scripts

Sequence: 4

Question: Is it an immediate danger to people or property?

Record 4 of 4 Edit Mode Ready...

- Enter a sequence number and type a question into the fields provided.
  - For our sewer stoppage problem, we've entered the script "Is there any sewage material or standing water?" This will help us determine the extent of the problem.
- Click  to save the record. Your problem scripts will appear in the grid.



Priority: 1 Immediate Priority Overdue Notif

Sequence /	Question
1	When did the overflow start?
2	Is it still overflowing at this time?
3	How many Gallons a minute would you estimate the fl...
4	Is it an immediate danger to people or property?

Record 1 of 1 View Mode Ready...

- These scripts will be automatically carried over to the work order when this problem is selected.

**Notes:** \_\_\_\_\_

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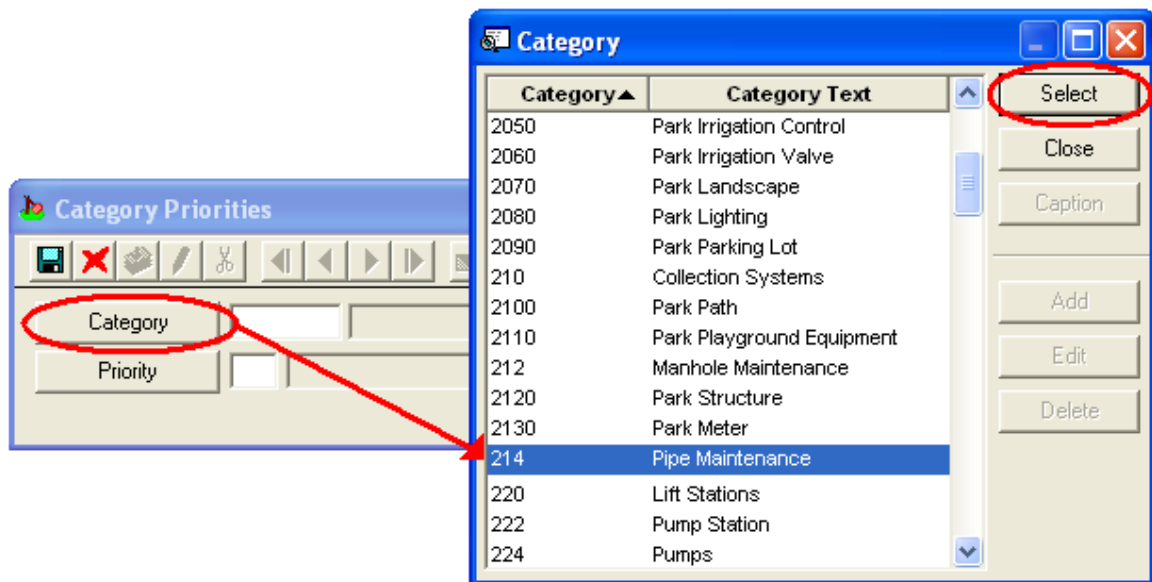
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## 6. Next Tab: Categories

- Use this tab to associate categories with the problem. When a Category is chosen in *Work Orders*, the available problems are limited to those associated with that Category.
- To add a category, open the **Categories** tab. Then, right click in the grid and select *Add Record*. A new form will open allowing you to enter a category.




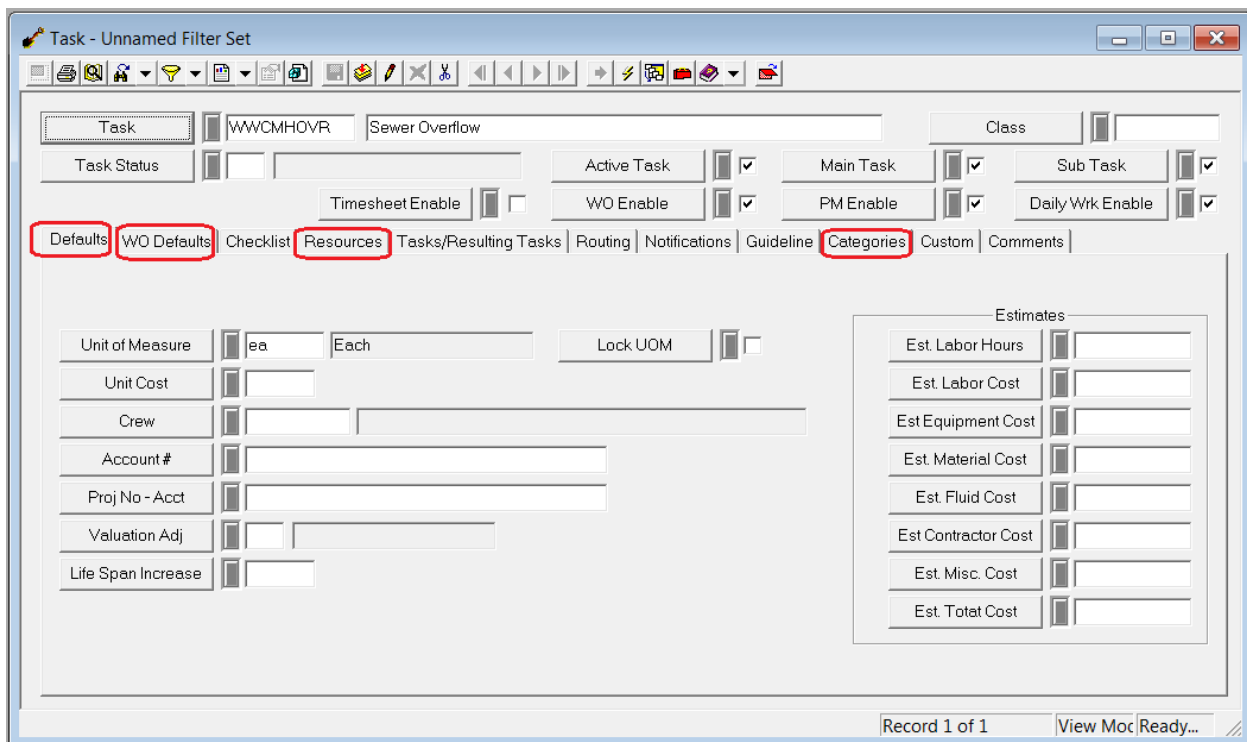
- Click on the Category button to access the pick list. This list comes from the *Work Flow Setup, Categories* module that we discussed earlier.
- Highlight a category in the list and click *Select*.
- If you choose, you can select a priority from the pick list (low, medium, high).
- Then, click  to save the record. The new category and priority will be added to the grid.
  - As you can see in the example below, we've associated our Sewer Stoppage problem with Lift Stations, Pipe Maintenance, Manhole Maintenance, Collection Systems, Sewer Department, and Miscellaneous categories.

Cat Code ▼	Cat Description	Priority Text
230	Miscellaneous	High
220	Lift Stations	
214	Pipe Maintenance	
212	Manhole Maintenance	
210	Collection Systems	
200	Sewer Department	
1000	Miscellaneous	

## Work Tasks

After establishing categories, creating resource records, and entering problems, you'll want to create records in the *Work Tasks* module for each task performed when completing a work order. Each task record you create is added to pick lists used throughout the *Work* module. The task records consist of default information for the task, such as unit cost, estimated completion time, resources used, and associated work order categories. Whenever a task is selected as the main task in a work order, all default information will automatically be carried over to that work order.

1. Open the tasks module by selecting from the menu **Work>>Work Flow Setup>>Work Tasks**.
2. Click the *Add* button  on the toolbar to enter *Add Mode*.
3. You'll generally include information in the following important areas:
  - **Default Data** - Data that will be carried over to the work order.
  - **Resources tab** - Associates resources with a task. This limits the resources available for use on a work order when the task is selected as the Main Task.
  - **Categories tab** - Associates a category with a task. This limits the tasks available when a category is chosen in the *Work Orders* module.



Task - Unnamed Filter Set

Task: WWCMMOVR Sewer Overflow

Class:

Task Status:

Active Task: ☒ Main Task: ☒ Sub Task: ☒

Timesheet Enable: ☐ WO Enable: ☒ PM Enable: ☒ Daily Wrk Enable: ☒

Defaults WO Defaults Checklist Resources Tasks/Resulting Tasks Routing Notifications Guideline Categories Custom Comments

Unit of Measure: ea Each Lock UOM: ☐

Unit Cost:

Crew:

Account #:

Proj No - Acct:

Valuation Adj:

Life Span Increase:

Estimates

Est. Labor Hours:

Est. Labor Cost:

Est. Equipment Cost:

Est. Material Cost:

Est. Fluid Cost:

Est. Contractor Cost:

Est. Misc. Cost:

Est. Total Cost:

Record 1 of 1 View Moc Ready...

**Notes:** \_\_\_\_\_

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#### 4. Header Information

- Enter a **Task** code and description. This is required; it allows you to identify the task you'll be recording. This code and description will appear in the Task pick lists throughout the *Work* module.
  - In our example, we've created a task entitled "Street Construction - Install Drainage". This is a good example of a task description as it is easy to identify its purpose.
- Mark the task check-boxes.
  - **Active Task** - Signifies whether this task is actively used. If active, it will appear in the Main Task and/or Sub Task pick lists, depending on which buttons are selected.
  - **Main Task** - If marked, this task will appear in the Main Task pick list.
  - **Sub Task** - If marked, this task will appear in the Sub Task pick list.
  - **WO Enable** - If marked, this task will appear in the Work Order Module pick list.
  - **PM Enable** - If marked, this task will appear in the PM/Work Template Module pick list.
  - **Daily Wk Enable** - If marked, this task will appear in the Daily Work Module pick list.

The screenshot shows a software window titled "Task - Unnamed Filter Set". It contains several input fields and checkboxes. A red rectangle highlights the "Task" field, which contains the code "WWCMHOVR" and the description "Sewer Overflow". Another red rectangle highlights a group of checkboxes: "Active Task", "Main Task", "Sub Task", "WO Enable", "PM Enable", and "Daily Wk Enable". All these checkboxes are checked. Below the checkboxes is a "Timesheet Enable" checkbox, which is unchecked. At the bottom of the window is a tabbed interface with tabs labeled: "Defaults", "WO Defaults", "Checklist", "Resources", "Tasks/Resulting Tasks", "Routing", "Notifications", "Guideline", "Categories", "Custom", and "Comments".

**Notes:** \_\_\_\_\_

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## 5. Default Information

- Two tabs allow you to enter default information about a task: **Defaults** and **WO Defaults**. This default information will automatically be carried over to a work order when the task is selected. You can use these tabs to include default units of measure, cost, estimated hours, and work crews, among other things.
- For example, in our Street Construction - Install Drainage task, we've set the UOM as Linear Miles and the Unit Cost at 120. This means that for each linear mile of street construction, the cost to install drains will be \$120.00. We've also included Stormwater Construction as the default work crew.

*Note the presence of a "Lock UOM" checkbox. When this is marked, the specified Unit of Measure will always be used with the Work Task in this record. When this Task is added as a sub-task to Work Orders or PMs, the UOM will be automatically populated and will not be editable by users.*

- In addition to the default data on the previous page, we've included a priority of 2 - Same Day Priority, assigned a supervisor (Shiela Kamdon), a lead worker (Tony Sacks), and assigned this task to the Waste Water Collection department.
- This information will also be carried over to the work order when this task is selected.

## 6. Resources Tab

- This tab allows you to include all resources needed to complete the task. You can include employees, materials, fluids, equipment, etc.
  - In the example below, you can see that we've included a backhoe (equipment) as well as materials of sand and cement

Task - Unnamed Filter Set

Task: WWCMMHOVR Sewer Overflow




Task Status: [ ] Active Task: [x] Main Task: [x] Sub Task: [x]

Timesheet Enable: [ ] WO Enable: [x] PM Enable: [x] Daily Wrk Enable: [x]

Defaults | WO Defaults | Checklist | **Resources** | Tasks/Resulting Tasks | Routing | Notifications | Guideline | Categories | Custom | Comments

Type /	Resource	Resource Desc	Unit of Measure Text	Units Est
Equipment	1336	Backhoe	Hours	
Material	283	Sand		
Material	282	Cement		

Record 1 of 1 View Moc Ready...

- Since we already have all of the equipment and materials needed, we'll demonstrate how to add an employee. Keep in mind that the steps we'll go over below are used for adding all resource types.
  - Right click in the grid and select *Add Record*.
  - Choose 'Employee' as the Resource Type.
  - Select an employee name from the pick list. We've chosen Mark Stephens. The unit of measure (hours) will be carried over from *Work Flow Setup*.
  - Enter other information in the fields provided. For example, we've entered '8' in the units field, meaning that Mark works 8 hours a day (by default).
  - Save  the record. You can Add  another resource or Close  the form.

Task Resources

Resource Type: 1 Employee

Resource: 105.2 Mark Stephens

Alt Description: [ ]

Account #: [ ] Group No: [ ]

Proj No - Acct: [ ]


Unit of Measure: 1 Hours

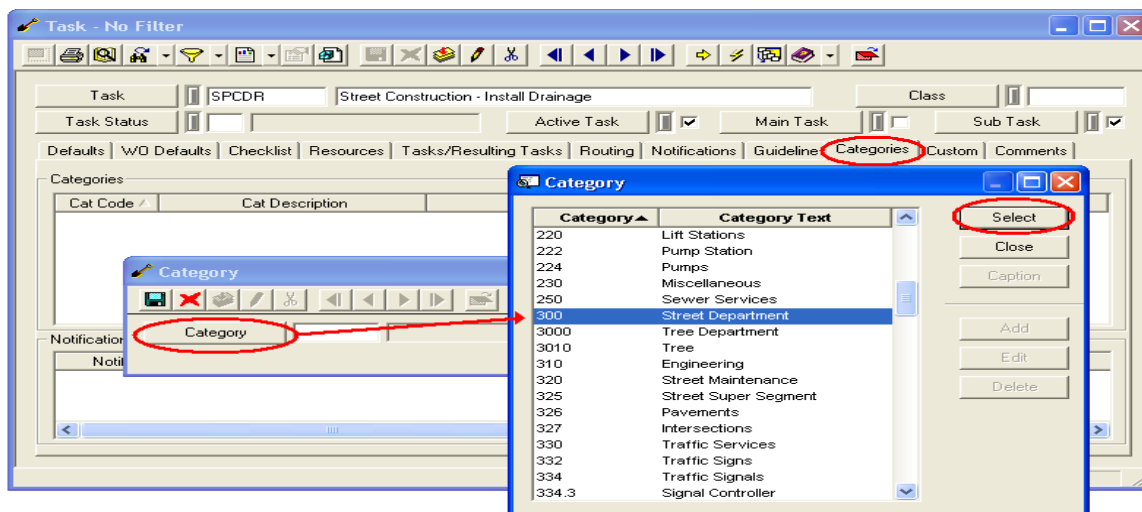
Units: 8 Norm Regular OT Estimated

Time Cost: 1 REGULAR TIME

Record 0 of 3 Add Mode Ready...

## 7. Categories Tab

- This tab allows you to associate your work task with established categories. When a category is chosen in *Work Orders*, the associated work tasks will be the only ones available for selection as valid tasks; however, you can still add *invalid* work tasks—those not associated with the category.
  - Right click in the grid and select *Add Record*.
  - Click on the Category button to access the Category pick list.
  - Highlight the category you wish to be associated with your work task. For our work task example, Street Construction - Install Drainage, we've selected "Street Department" as our default category.
  - Click  to save the record.



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## Notification Templates

Now that you've established categories, created resource records, entered problems, and created a series of work tasks, you can set up your notification templates. These templates are created in the *General > Notifications* module. Notification templates can be used for several modules, throughout Lucy. For Work the notifications are sent from the *Work Order* module, *Work Requests* module, *Master Project* module, and *Project PO* module.

Notifications can be used in any of the following ways:

- To automatically alert employees and supervisors when a new work order is created and assigned to them.
- To alert employees that the problem in a request or a task in an open work order has changed or is past due.
- To thank customers for their requests (Thank You email).
- To inform customers that you have taken care of the problem reported (completion email).
- To automatically alert supervisors when a work order is complete.
- To automatically alert supervisors when a work order's priority is changed

Notifications can be formatted as emails, text messages, Lucy Messenger pop-ups, or reports. Customer notifications and overdue task notifications are sent as emails by default. This section will cover creating a notification template, then setting up a customer notification, or either type of overdue notification. For more detailed information about creating notification templates, or about setting up other types of notifications please read the Notifications guide also included in the ACT material.

**Note:** For any email notifications to be sent, the Lucy Services must be installed on the server.

**Notes:** \_\_\_\_\_

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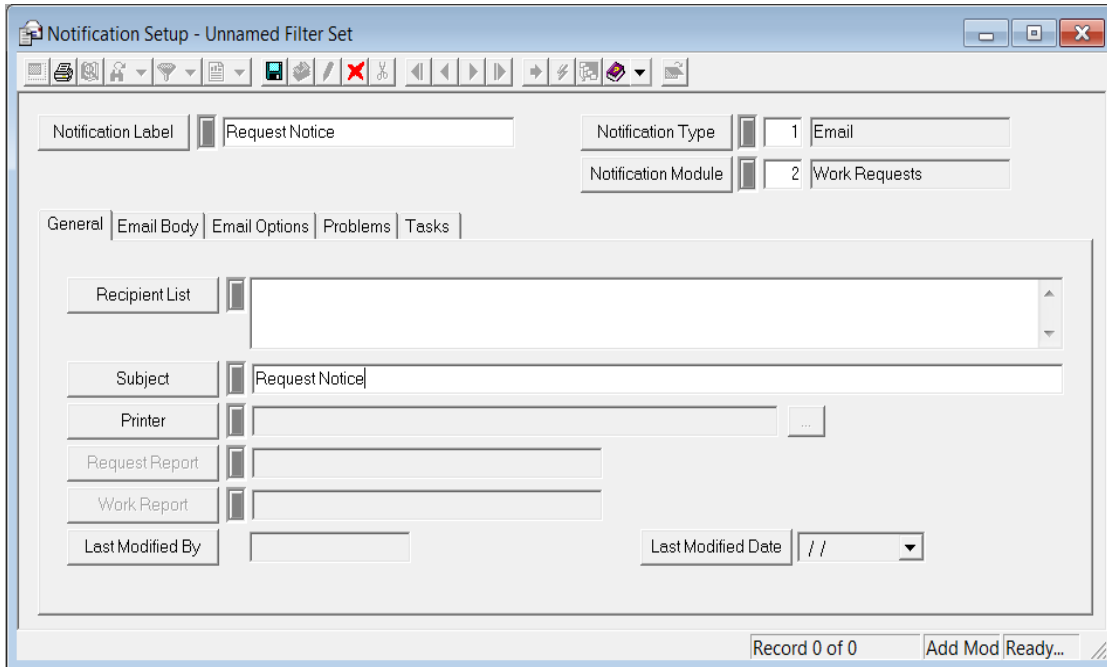
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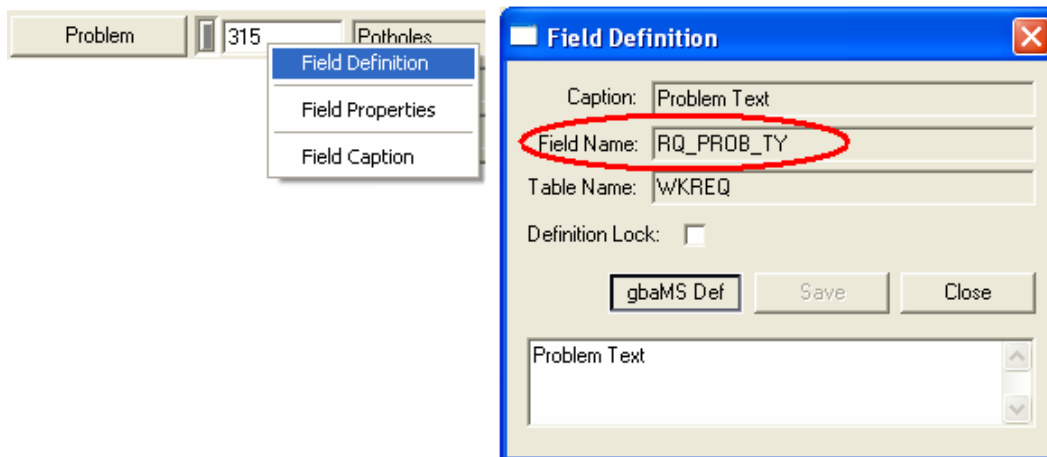
## Creating Email Notifications

1. Open the *Notification Setup* module by selecting **General > Notification Setup** from the desktop application main menu.
2. Click  to add a new record.

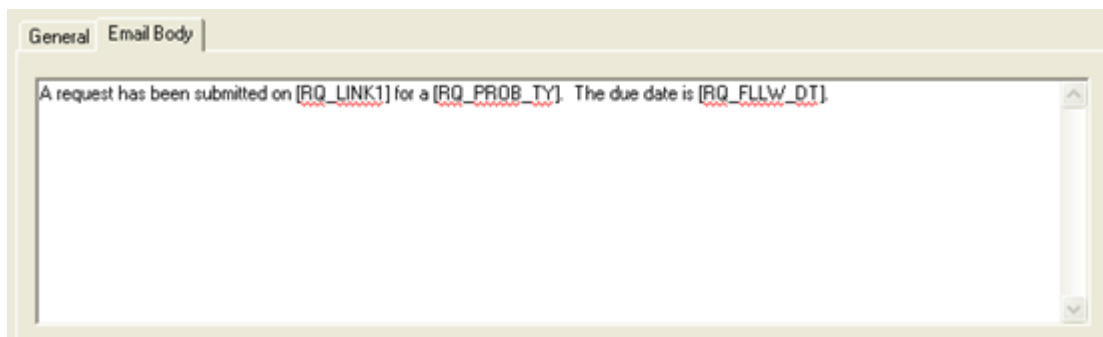


3. Enter a unique notification label. This allows you to easily identify your template.
  - We've titled the example above, "Request Notice". We'll be using this sample template to send a request notification back to the customer.
4. Select the Notification Type in the header. You'll click on the caption button to choose from a pick list.
  - The Notification Types include Email, Report to Printer, Report to Default Printer, and Messenger.
  - The format you select will determine which fields need to be filled out on the screen above.
  - We've selected "Email" for our example.
  - The majority of notification types only support Email notifications. General Problem and Task notifications support the other types of notifications.
5. Select the Notification Module. This specifies which module this notification will be available for. If a notification could be triggered by two separate modules, select either one of them from the list.
  - For our example we chose Work Request.
6. In order for the email message to be sent, you'll need to include an email address. Some notifications pull recipients from the modules the notification is sent from and don't need recipients added to the notification's recipient list. However, any recipients that are specified in the notification template will receive the notification every time it is used, no matter what.

- You can choose to include multiple emails in the recipient list. Use a semi-colon to separate the email addresses.
  - For the example we aren't going to add any email addresses to the recipient list. The email address of the customer putting in the request will be supplied by each request.
7. Type what you would like to appear in the subject line of the email.
  8. On the Email Body tab, type what you would like to appear in the email body text.
  9. You can automatically insert field data from the work order or request into the subject line or email body of a notification.
    - Data can be auto-inserted from the main tables (WKREQ for Requests and WKORDER for Work Orders) and Comment fields (i.e. WO\_MEMO, RQ\_MEMO1, etc.).
    - To auto-insert data, enclose field names in brackets [].
    - Field names can be found using the CTRL + Right Click option. The Field Name will be listed in the Field Definition dialog box.



- In our example below, we have included the following fields:
  - RQ\_LINK1 - Affected Asset
  - RQ\_PROB\_TY - Problem Type
  - RQ\_FLLW\_DT - Due Date



- The data in these fields will then be automatically inserted in the email notification. Thus, in our example, the email notification body will read: "A request has been submitted on [this affected asset, e.g. pavement] for a [problem, e.g. pothole]. The due date is [whatever date has been set, e.g. 5/15/2009]."

## Customer Notifications

You can use an email template like the one you just created to set up customer notifications. These are the 'Thank You' and 'Completed' emails sent from *Requests*.


Who receives the notifications?

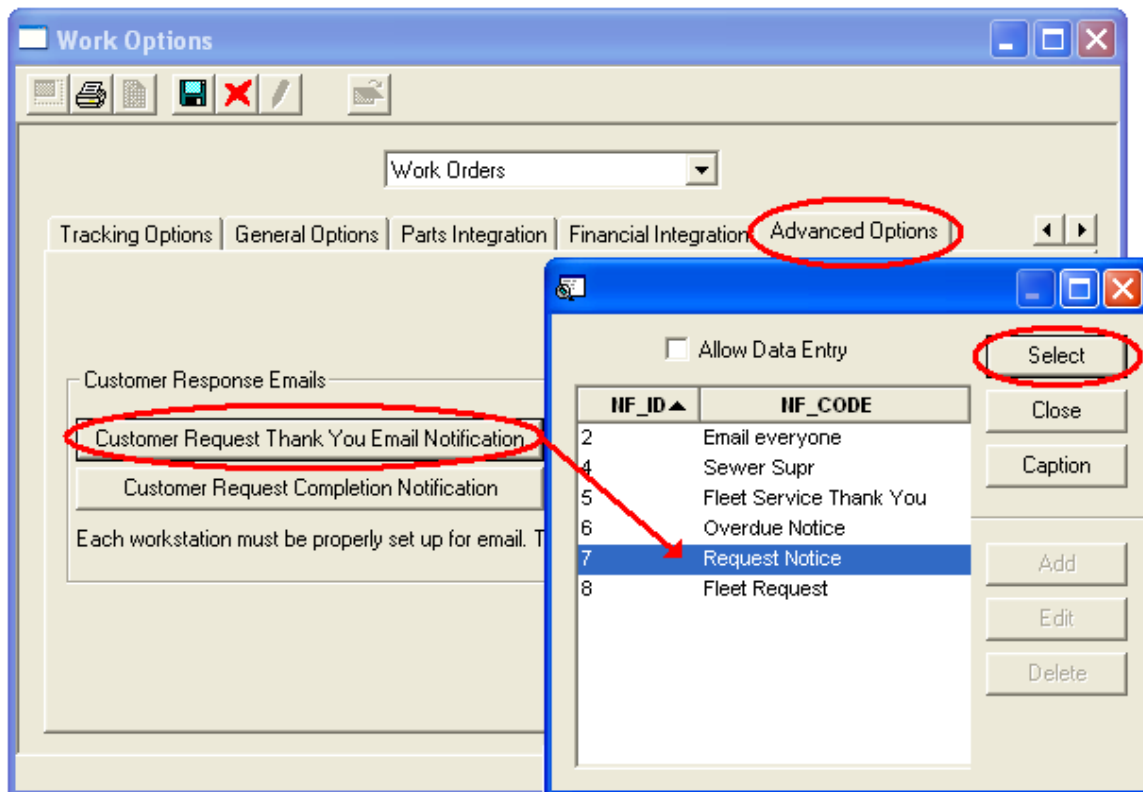
- The 'Thank You' email is sent to the original requester (listed in the Requester tab), as well as any requesters that were added to the record at a later date.
- When the request or associated work order status is 'Complete,' the 'Completed' email will be sent to all requesters listed.
- These notifications are also sent to anybody specifically included on the Recipient list on the notification template. (For example, sometimes supervisors like to see an email for all requests that come in.)

When are the notifications sent?

- 'Thank You' emails are sent automatically when the request is saved, as well as anytime a requester is added to the record.
- 'Completed' emails will be sent to all requesters when the request or work order status is changed to 'Complete'.


To start we will need to specify which notification templates will be used for the customer notifications. This is done in the *Work Options* module.

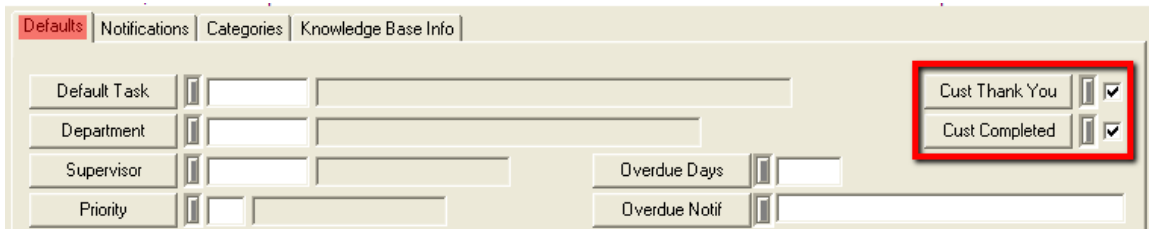
1. Open **Work > Administration > Work Options** from the desktop application main menu.
2. Open the Advanced Options tab and click  to enter *Edit Mode*.



- Using the field caption buttons to access the pick lists, select Notification Templates for the 'Thank You' and 'Completed' emails. Then, save your changes.
- Now whenever a customer notification is triggered, these notification templates will be used.

The Customer Request notifications are control by the problem module. So the notifications are only sent if a problem that has the notification turned on, is selected on the request.

- To turn the Customer Notifications on for a problem go to the Work > Work Flow Setup > Problems module. Find the problem(s) to turn this notification on for.
- Click  to enter *Edit Mode*.
- On the Defaults tab mark the Cust Thank You and/or Cust Completed fields.



The screenshot shows the 'Defaults' tab in the 'Problems' module. The 'Cust Thank You' and 'Cust Completed' checkboxes are checked and highlighted with a red box. Other fields include 'Default Task', 'Department', 'Supervisor', 'Priority', 'Overdue Days', and 'Overdue Notif'.

- Save and close the record.
- Now whenever this problem is selected on a request the corresponding notifications will be sent.

To test the Customer notification go to the request module and create a new request. On the Customer tab enter the customer information, making sure to include the email address. Select the problem on the Request tab. Save the request. The notification will be sent.

## Overdue Problem Notifications

Email notifications are also used to inform employees of overdue requests. You can create specific email templates for overdue problems using the process we went over above.

What determines when a problem is overdue?

- The follow-up date in the Request (under the Department/Utility Locates tab).
- The system calculates the follow-up date based on the status date (when the request was entered) and what you have set up as the overdue days in *Work Flow Setup*.


Who receives overdue problem notifications?

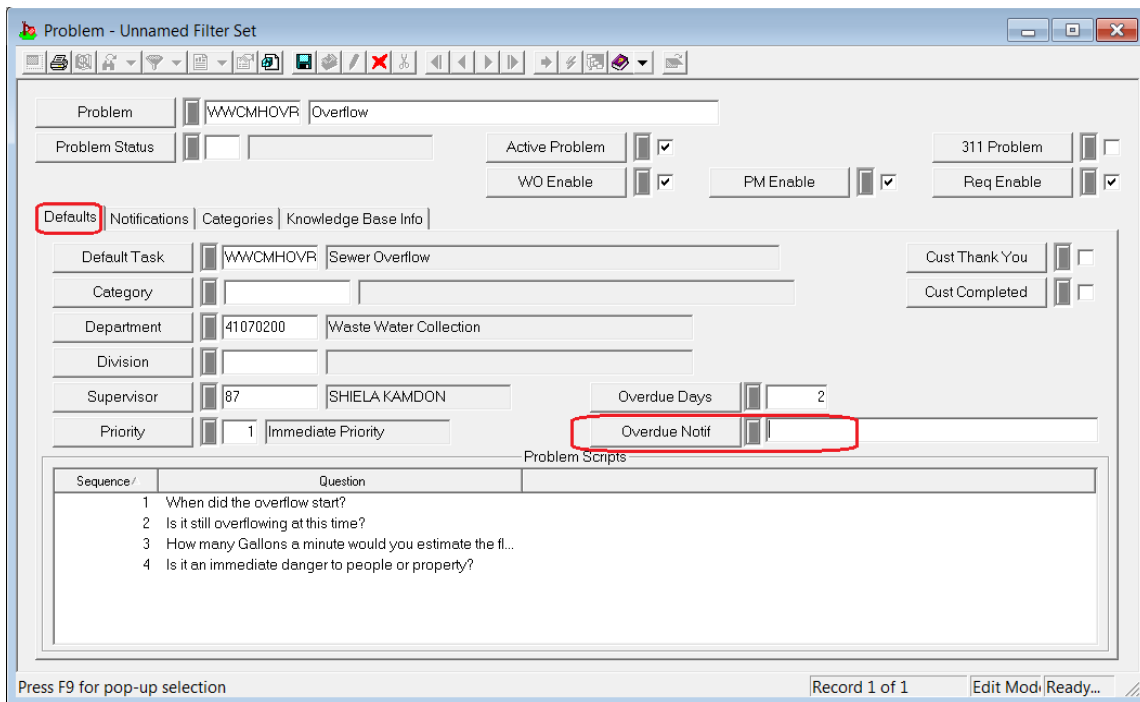
- The overdue notification is always sent to the supervisor's email, but can be sent to additional recipients based on what you set up in the *Notifications* module.

When are overdue notifications sent?

- Overdue notifications are processed each night on the server. They are dispatched by the *Requests* module.

You'll need to set up default overdue notifications in the *Work Flow Setup, Problems* module.

1. Open **Work > Work Flow Setup > Problems** from the desktop application main menu.
2. Find the problem for which you'd like to setup a default notification and then click  to enter *Edit Mode*.



Sequence /	Question
1	When did the overflow start?
2	Is it still overflowing at this time?
3	How many Gallons a minute would you estimate the fl...
4	Is it an immediate danger to people or property?

3. On the Defaults tab, click the Overdue Notif field caption button to access the pick list. Then, select a notification template (like the one you created before).
4. For our example, we're using the Sewer Stoppage problem.
5. After selecting the notification to be sent when a problem is overdue look at the Overdue Days field. Enter the number of days between when the request is created and when it is considered overdue. This number is used to calculate the follow-up date.

**Notes:** \_\_\_\_\_

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To make sure that the request supervisor receives an email they need to have their email address specified on their employee record in the Work Flow Setup.

1. Go to Work Flow Setup > Employee Setup.
2. On the Contact Info tab fill out the Email field

The screenshot shows the 'Contact Info' tab of the 'Employee Setup' form. The form has a tabbed interface at the top with the following tabs: General, Contact Info, WO Lead, WO Resource, Certifications, Classes, Categories, Availability, Classifications, Equip Usage, Time Admin, Custom, and Comments. The 'Contact Info' tab is active. The form contains several input fields: Address, City, State, Zip Code, Home Phone, Work Phone, FAX Number, Mobile Phone, Pager Number, Apartment, Email, SS Number, Birthdate, and an 'Emergency Contact Info' section with fields for Emerg Contact 1, Contact 1 Phone, Emerg Contact 2, and Contact 2 Phone. The 'Email' field is highlighted with an orange rectangular box.

To test the Overdue notification, go to the request module and create a new request. Select the problem on the Request tab. Save the request. Check the follow-up date on the Department/Utility Locates tab. A notification should go out the day after the follow up date.

## *Overdue Task Notifications*

Just like overdue problem notifications, email notifications can also be used to inform employees of overdue work tasks. You can create specific email templates for overdue tasks using the process we went over above.

What determines when a task is overdue?

- The projected completion date on the Costs tab of the Work Order.
- The system calculates the projected completion date based on the Work Order start date + the value (number of days) in the Estimated Task Duration field (on the WO defaults tab).


Who receives overdue task notifications?

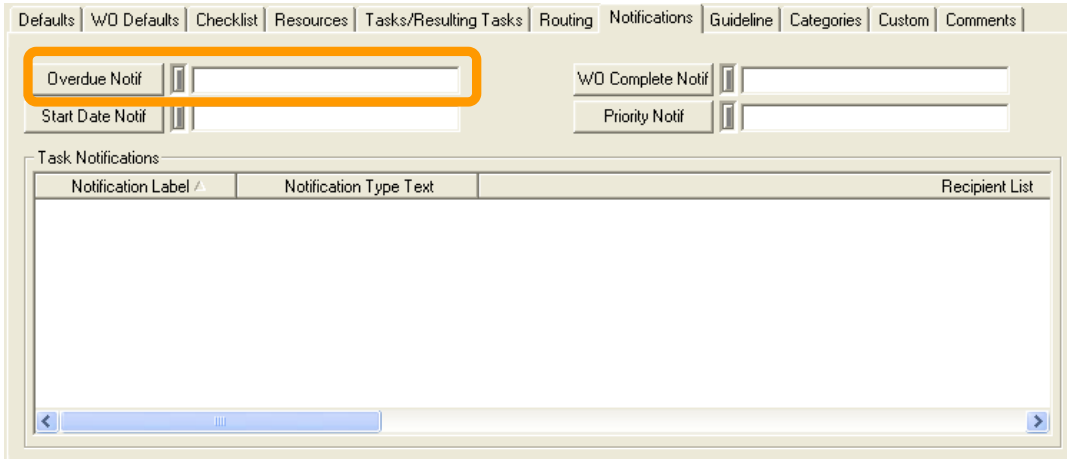
- The overdue notification is always sent to the supervisor's email, but can be sent to additional recipients based on what you set up in the *Notifications* module.

When are overdue notifications sent?

- Overdue notifications are processed each night on the server. They are dispatched by the *Work Orders* module.

You'll need to set up default overdue notifications in the *Work Flow Setup, Work Tasks* module.

1. Open Work > Work Flow Setup > Work Tasks in Lucity desktop.
2. Find the task for which you'd like to setup an overdue notification and then click  to enter *Edit Mode*.

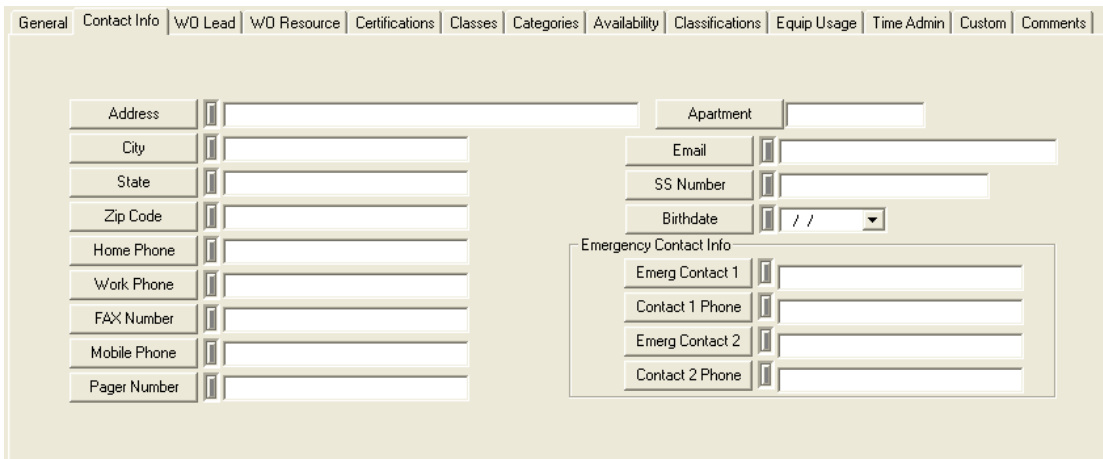


The screenshot shows the 'Notifications' tab in the 'Work Flow Setup, Work Tasks' module. The 'Overdue Notif' field is highlighted with an orange box. Below it, the 'Task Notifications' table is visible with columns for Notification Label, Notification Type Text, and Recipient List.

3. On the Notifications tab, click the Overdue Notif field caption button to access the pick list. Then, select a notification template (like the one you created before).
  - For our example, we're using the Street Construction, Install Drainage task.
4. After choosing the notification to send, go to the WO Defaults tab and fill out the Est Task Duration field. Enter the number of days before the Work Order should be considered overdue. The system will use this number and the work orders start date to calculate the Project Compl field. Then overdue notification will be sent out the day after the date stored in that field.

To make sure that the request supervisor receives an email they need to have their email address specified on their employee record in the Work Flow Setup.

1. Go to Work Flow Setup > Employee Setup.
2. On the Contact Info tab fill out the Email field



The screenshot shows the 'Contact Info' tab in the 'Employee Setup' module. The form contains fields for Address, City, State, Zip Code, Home Phone, Work Phone, FAX Number, Mobile Phone, Pager Number, Apartment, Email, SS Number, Birthdate, and Emergency Contact Info.

To test the Overdue notification, go to the work order module and create a new work order. Select the task in the header fields. Save the record. Check the project completion date on the Costs tab. A notification should go out the day after the project completion date.

## Overriding Notifications

1. Supervisor, overdue problem, and customer notifications can be overridden using the Department/Utility tab of the *Work Requests* module.
  - Simply open the Department/Utility Locates tab and mark the checkboxes at the right-hand side of the screen for whichever notifications you wish to be overridden. By marking these boxes, the system will NOT send the corresponding emails; however, other notifications may be sent if they are included in the Notification tab.
2. Supervisor, lead worker, overdue problem, and overdue task notifications can be overridden using the WO tab of the *Work Orders* module.
  - Open the WO tab and mark the checkboxes at the right-hand side of the screen for whichever notifications you wish to be overridden. By marking these boxes, the system will NOT send the corresponding emails.

The screenshot shows the 'Work Orders - No Filter' window. The 'WO' tab is selected and highlighted with a red box. The 'Override Notifications' section on the right is also highlighted with a red box and contains the following checkboxes:

- ☐ Problem
- ☐ Overdue
- ☐ Lead Worker
- ☐ Task
- ☐ Supervisor

Below these checkboxes is a 'Hard Lock WO' checkbox, which is currently unchecked.

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## Work Options

The *Work Options* module allows you to customize your *Work Order* and *Request* numbers, select options to track in *Work Orders* and *Requests*, set up general options, select integration options, and choose default email templates in the advanced options.

To access this module, select **Work>>Administration>>Work Options** from the desktop application main menu.

## Numbering Format

Within each tab you can select Numbering Format options for *Material Requisition*, *Work Orders*, *Work Permits* or *Work Requests*. The available Drop Down Options will change depending on your tab selection on the main form.


The tabs and their functions are listed below:

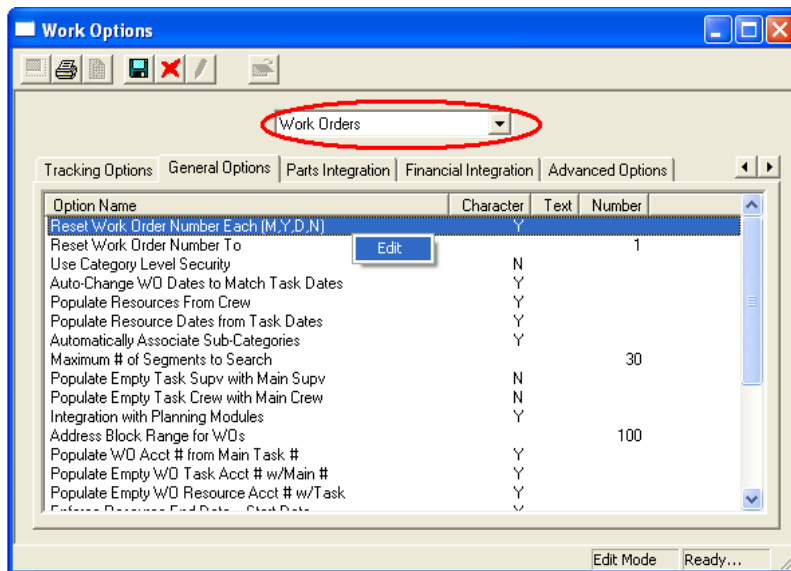
- **Number Format** - Use this tab to customize the number format for *Work Orders* or *Work Requests*.
- **Tracking Options** - This tab allows you to select which actions are tracked in the *Work Orders* and *Work Requests* Tracking tabs.
- **General Options** - Contains individual options for *Work Orders* and *Work Requests*.
- **Parts Integration** - This tab allows you to set options for integration of parts for *Work Orders* and *Work Requests*.


- **Financial Integration** - This tab allows you to set financial integration options for *Work Orders* and *Work Requests*.
- **Advanced Options** - This tab allows you to choose the default customer “Thank You” and request completion emails that will be automatically sent to clients. These emails are created in the *Work Flow Setup, Notifications* module. The Thank You email is sent upon saving a new request, and the completion email is sent upon closing a request. Remember, we discussed these notifications earlier in this workbook.

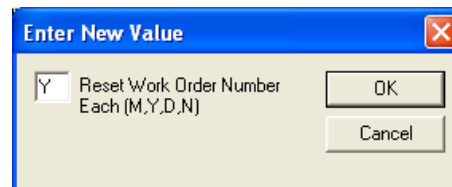
## Editing Work Options

Follow the steps below to turn on or off options in the tabs.

1. Click the Edit button  on the module toolbar to enter *Edit Mode*.
2. Select the tab with the options you wish to edit and chose *Work Orders* or *Work Requests* from the dropdown menu.
3. Highlight the option you wish to turn on or off. Right click and select *Edit*. A dialog box will appear.



- Type ‘Y’ or ‘N’ in the field provided to turn on or off ‘Yes’ or ‘No’ options.
  - Type ‘P’ in the field provided for options with the ‘Prompt’ feature.
  - Type a number (or other character) in fields where it is indicated.
4. Click *OK* to make your changes.
  5. Click  to save your selections.



## New to 14R2

- Work Flow setup is now web form enabled.