TRAINING GUIDE

Work Flow Setup Web

Work Flow Setup - Web

The Lucity 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 Lucity 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

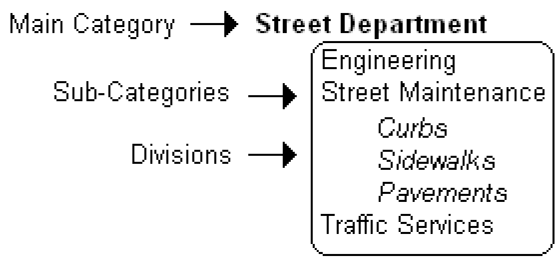
Before using the work flow setup modules listed above, we recommend creating an outline to help you better organize your infrastructure.

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



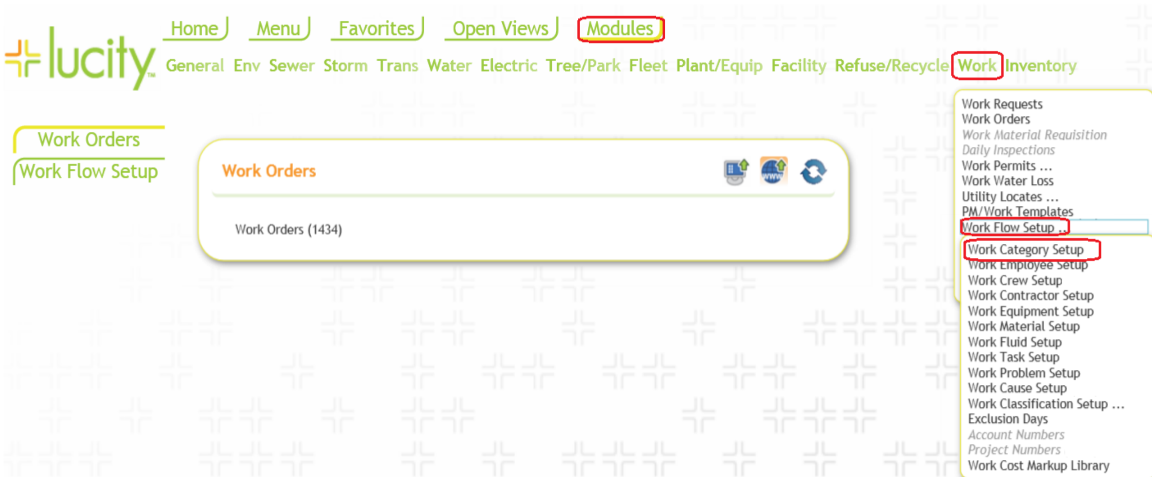
Next, you can group your resources (employees, equipment, materials, etc.) under the appropriate category or sub-category. For example, you may group street maintenance equipment, materials, tasks, problems, possible causes, and Street Department employees under the Street Maintenance sub-category.

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.

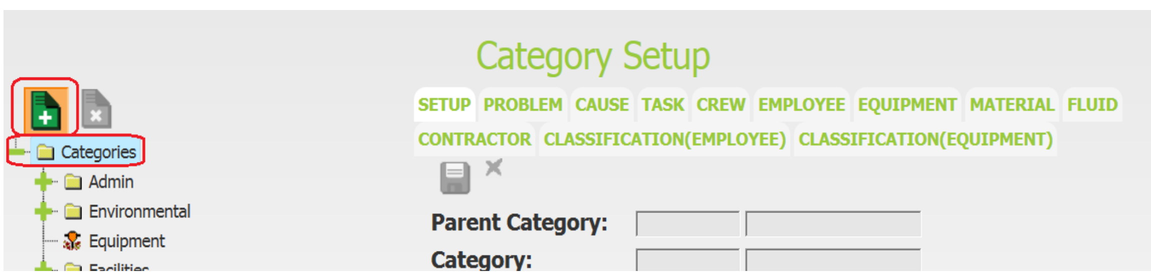
Notes:

Adding Categories or Sub-Categories

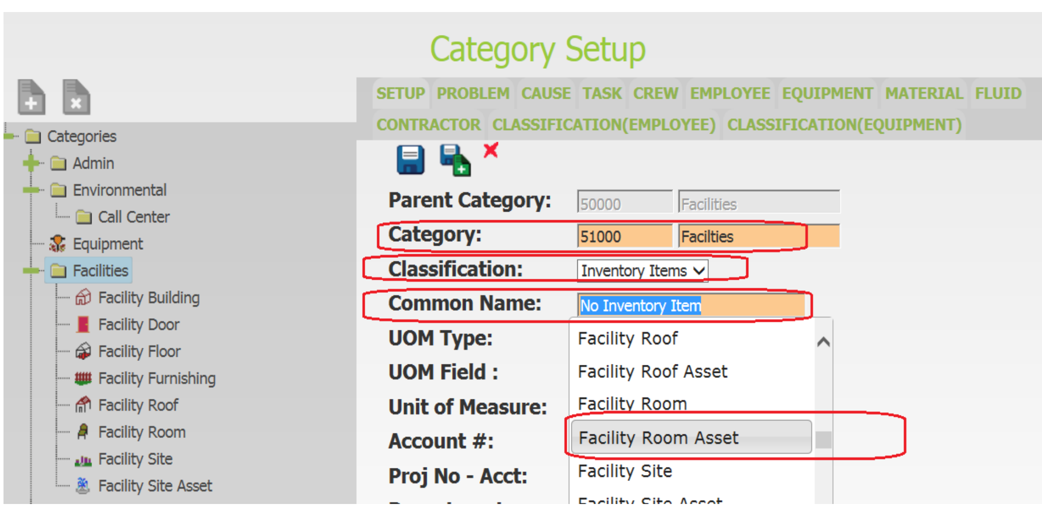
1. Open the *Categories* module by selecting Modules>>**Work**>>**Work Flow Setup**>>Work **Category Setup** from the Modules Menu.



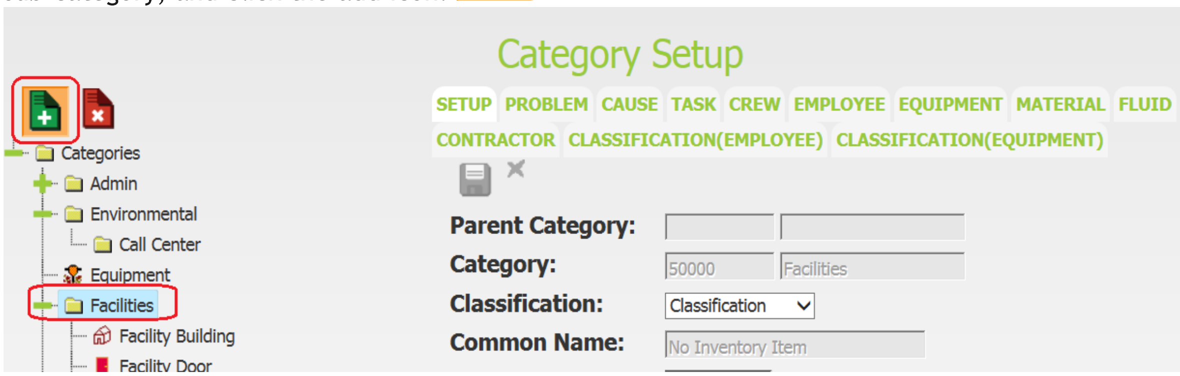
2. To add a **Category**, highlight the 'Categories' branch on the left and click the add icon.  This Category folder appears at the top of the list, all user defined categories will appear underneath.



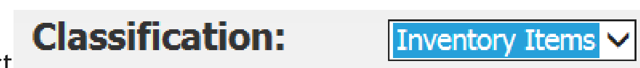
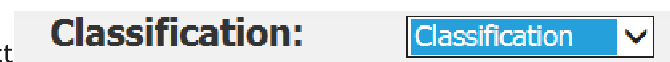
   a. Once the add icon is clicked, the Category setup is grayed out and the Category Code and Text for the new Category can be entered, Classification of inventory items can be selected and Common Name Inventory Item Type can be selected from the list.



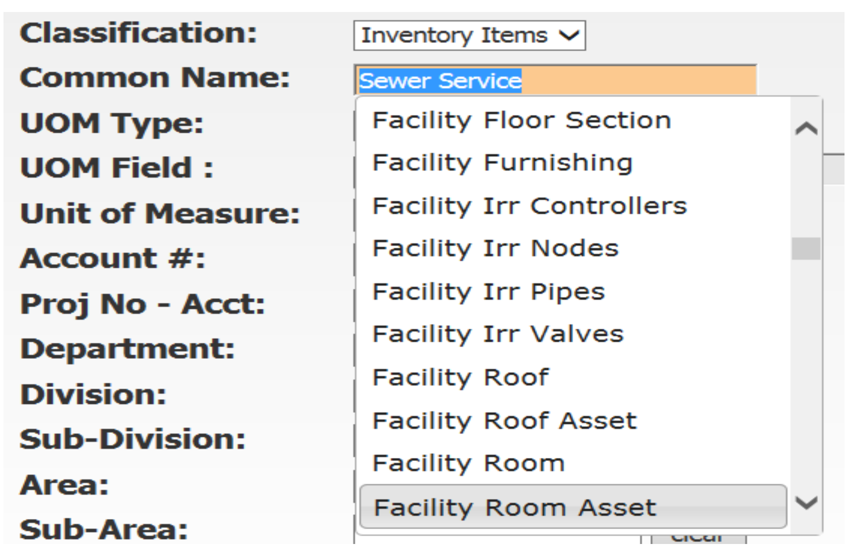
3. To add a **Sub-Category**, highlight an existing category you wish to be associated with the new sub-category, and click the add icon. 



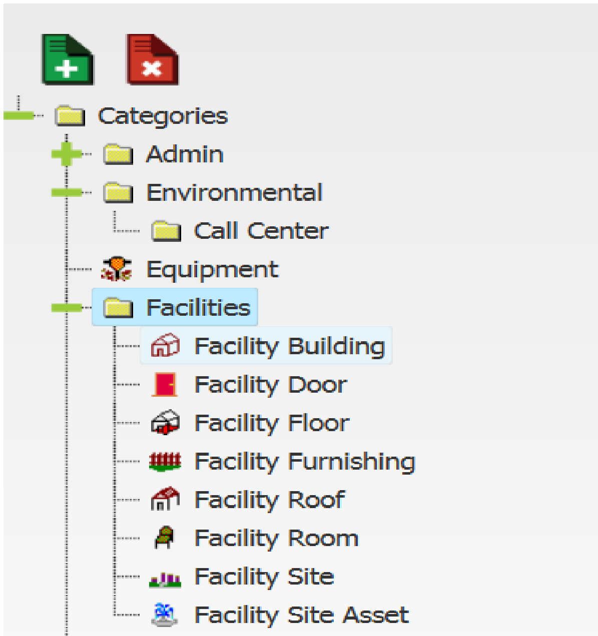
4. Create a Category name by entering a unique code and description. This will be used in the Category pick list throughout the *Work* modules.
   - In the example below, we've named the category "Facilities Room Assets"

5. Select a Classification from the drop-down menu.
   - If you select  , the Common Name field will be enabled and you will be required to populate it.
   - If you select  , the Common Name and the three Unit of Measure fields will remain inaccessible.

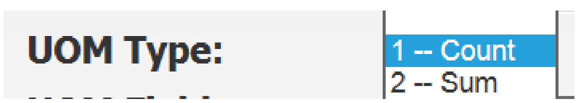
6. Select a common name from the drop-down menu. This links an asset to the category and enables work orders to pull quantity information from the module that houses that asset.



- 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, Facility Site and Facility Site Asset.

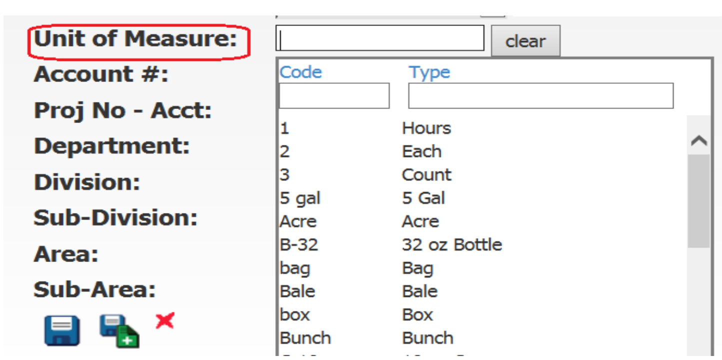


7. Select the UOM (Unit of Measure) Type from the pick list.

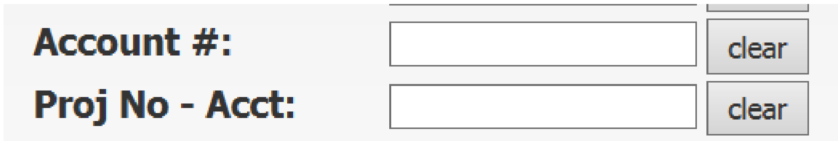


- If you select "count", the Quantity field in the *Work Orders* module will count the number of like assets associated with that work order.
- If you select "sum", the Quantity field will add the total measurements of the like assets.

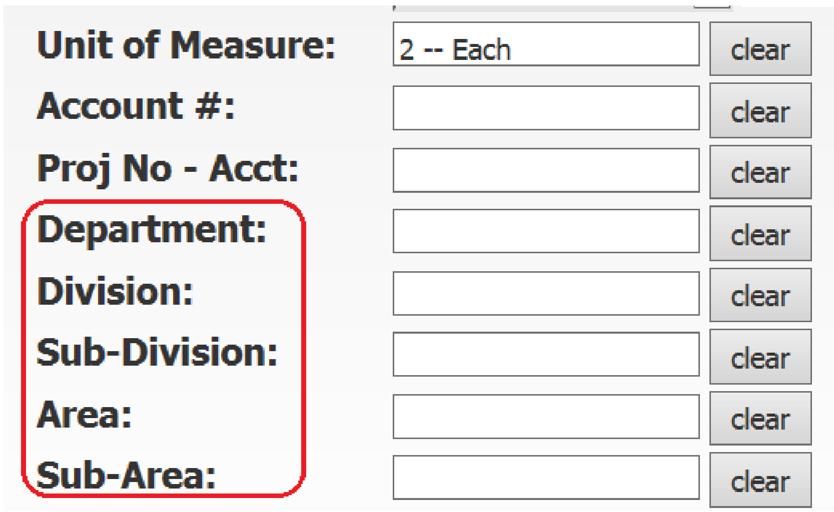
8. Enter the field you want the system to sum in the UOM field. If you chose "count", you can leave this field vacant.
9. Select the unit of measure from the pick list.
    - For example, these include hours, each, gallons, feet, etc.



10. Enter any default account or project numbers you want auto-populated in a work order when this category is selected.



11. Select Department, Division, Sub-Division, Area & Sub-Area in the same manner as Unit of Measure.



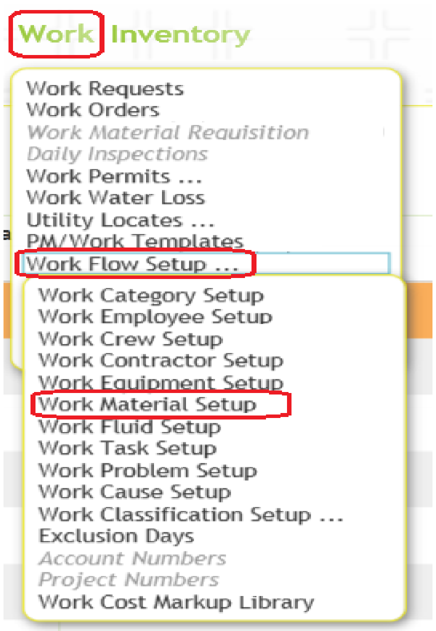
12. Save  your new category. Or Save and Submit another 

Notes:____

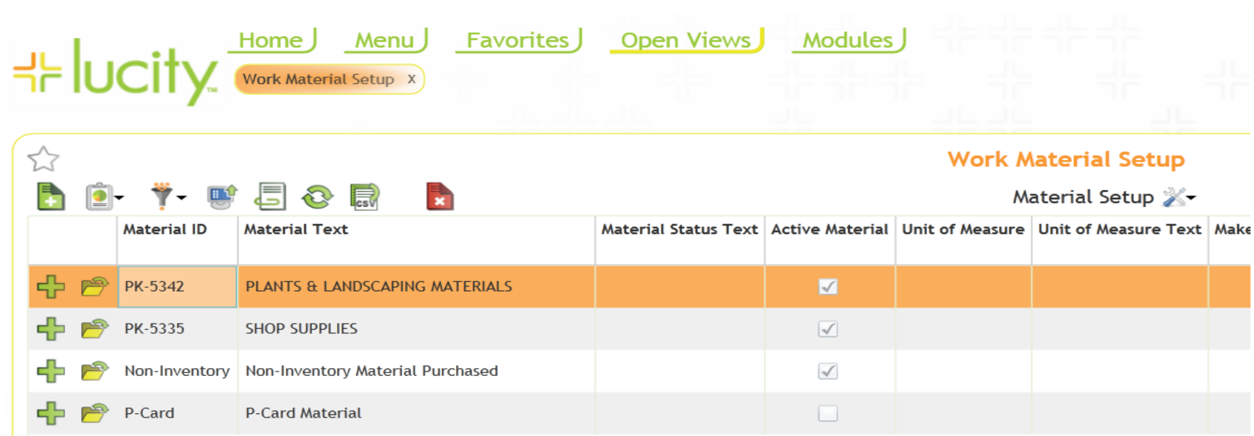
Resources

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.

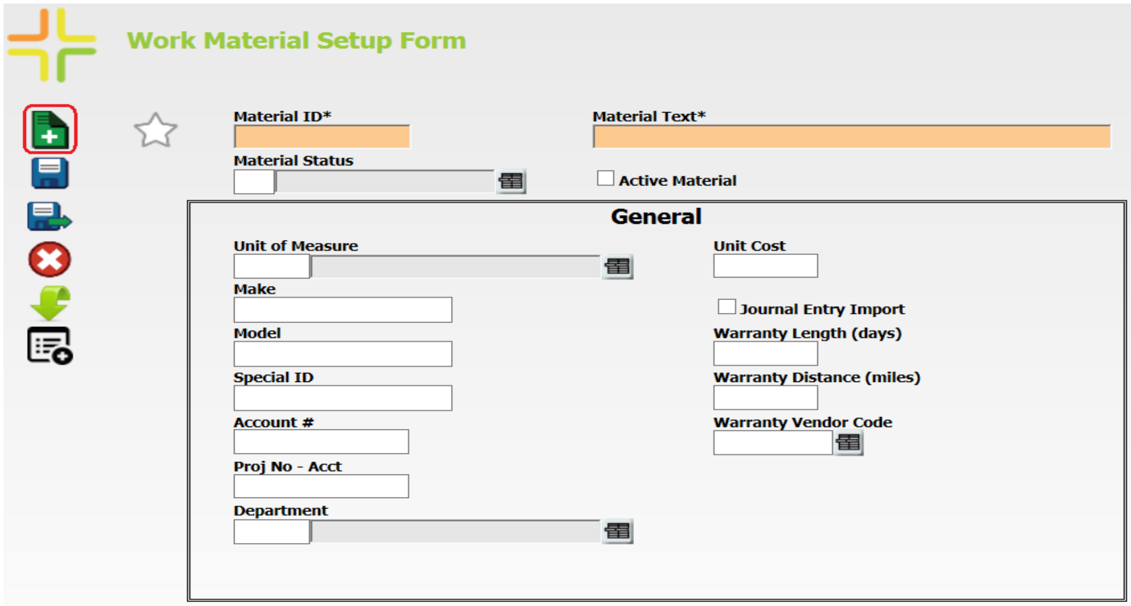
1. Open the resource modules by selecting from the menu Modules>>Work>>Work Flow Setup>>Work Material Setup.



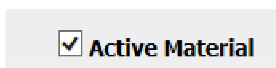
2. Opens up this screen.



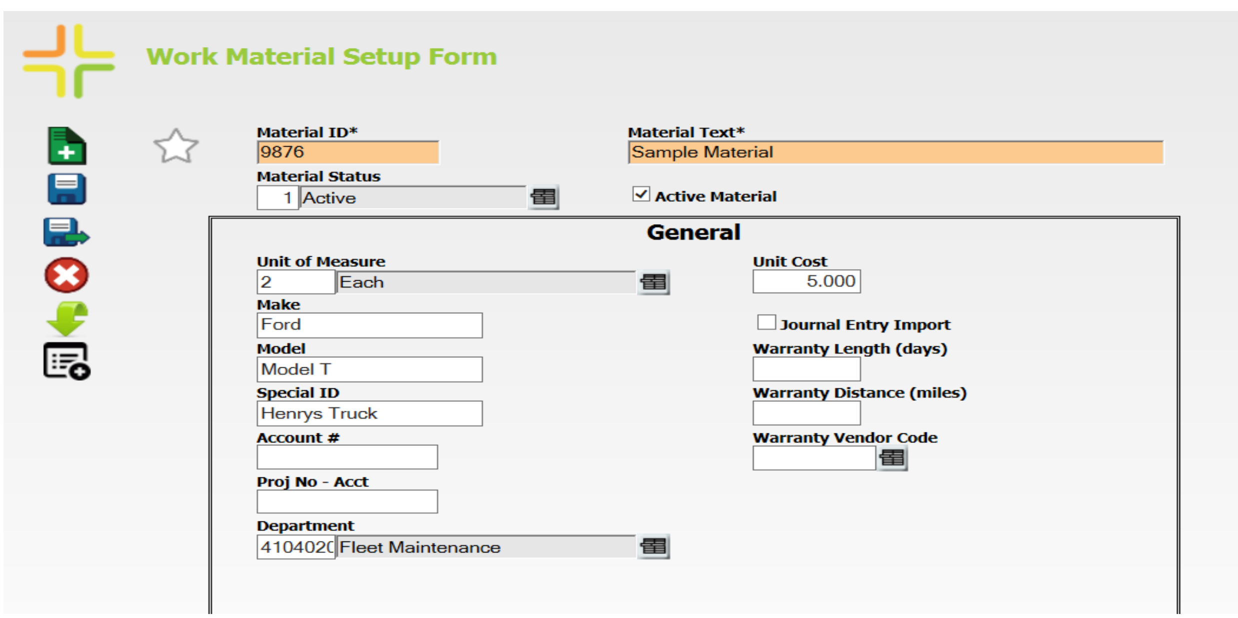
3. Click the Add button  on the top left of the toolbar to open up the input form for a new material record.



4. Enter the data specific to the material being loaded into the system on the input form.

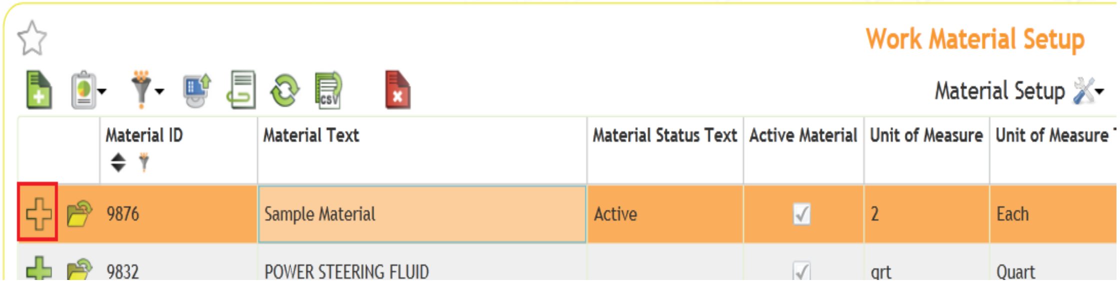
   a. *Note: If marked;* 

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.

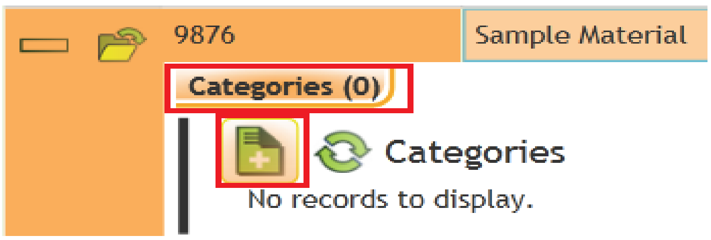


5. Click save and close. 

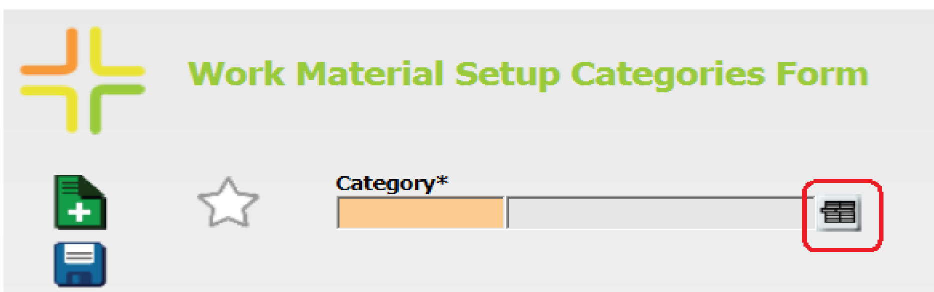
6. Once the material is saved click on the expand button to assign categories it can be used in.

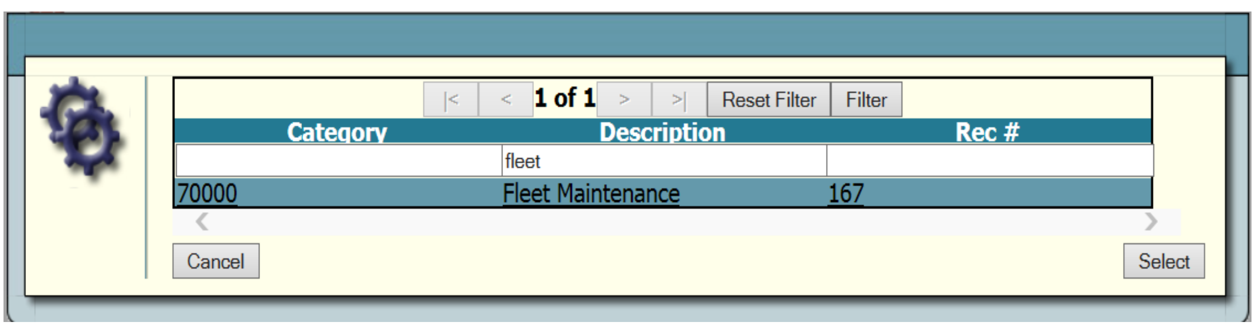


7. Click on Categories and Add record to assign Categories



8. Add the categories





9. And Click Select. Then click Save  or Save and close  if you are done selecting categories for this record.

10. While each resource module tracks information specific to the resource type, all of the resource modules contain main form identification information plus the following 2 information tabs:

    - **Categories** – Indicating what Categories the resource is associated with.

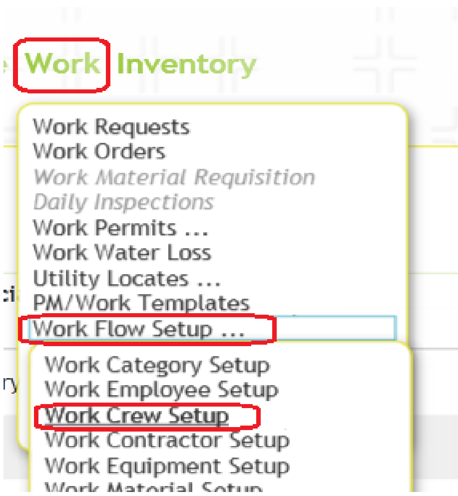
    - **WO as Resource** – Listing all work orders where the resource has been assigned.

Notes:

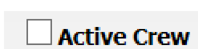
Crews

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.

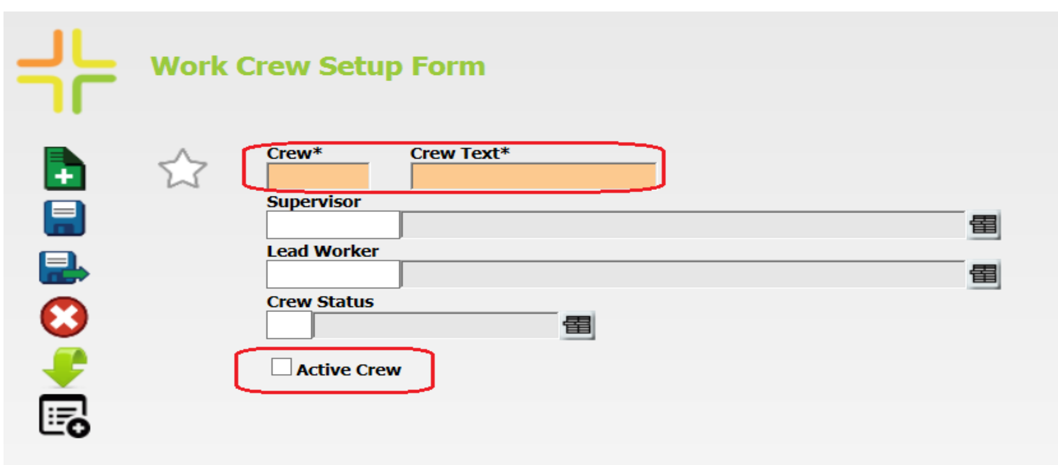
1. Open Modules>>**Work>>Work Flow Setup>>Work Crew Setup** from the Web application Modules menu.



2. Click the *Add* button  to enter a new record.
3. Enter Crew and Crew Text

4. ***Note:*** *If* 

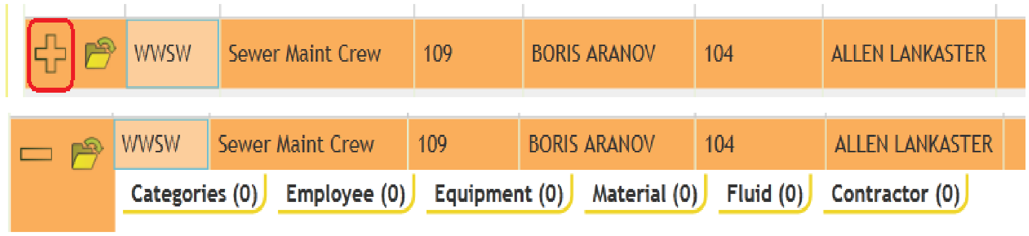
is marked, the crew will be designated as active and will appear in the Work Order's pick list for crew type. If this box is not marked, Crew will not be available for selection.



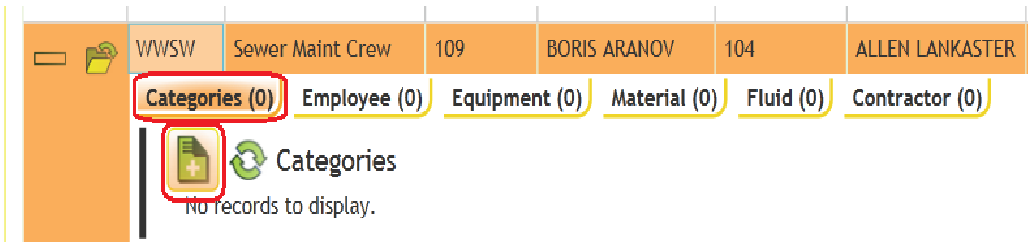
5. Select the Supervisor and Lead Worker from the list if you want those fields to auto-populate on work orders using this Crew.

6. Save the Crew by clicking on the save and close button 

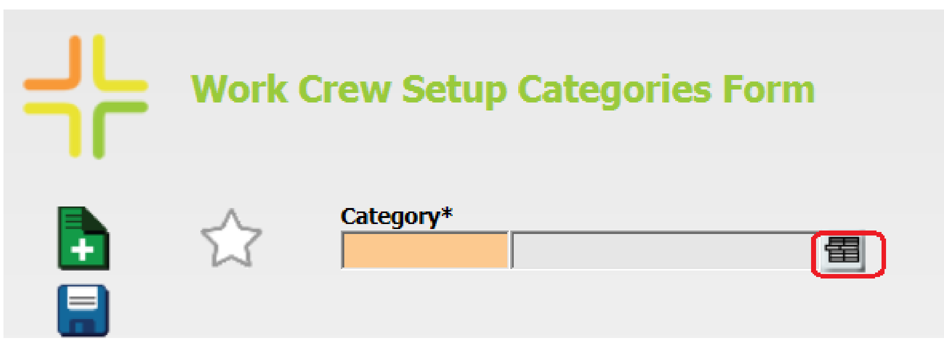
7. Locate the newly created crew on the grid and click on the expand button to assign categories it can be used in.



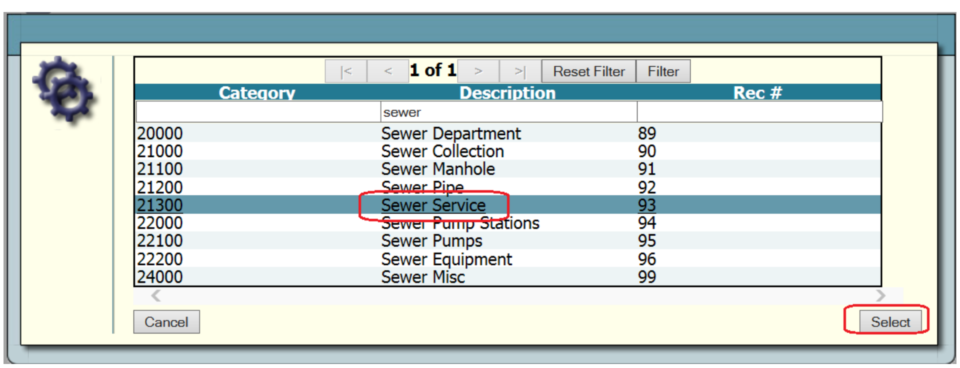
8. Assign Categories you would like this Crew to be used. Click on Categories and Add Record.



9. Open the Category list



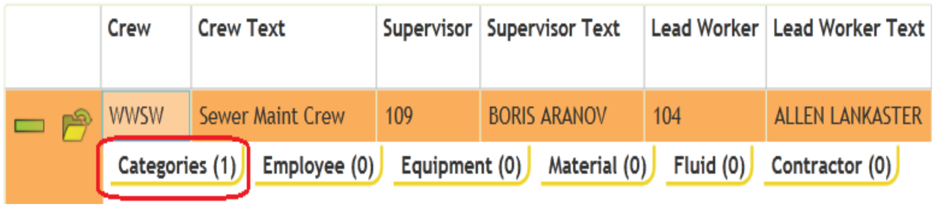
10. Select Category



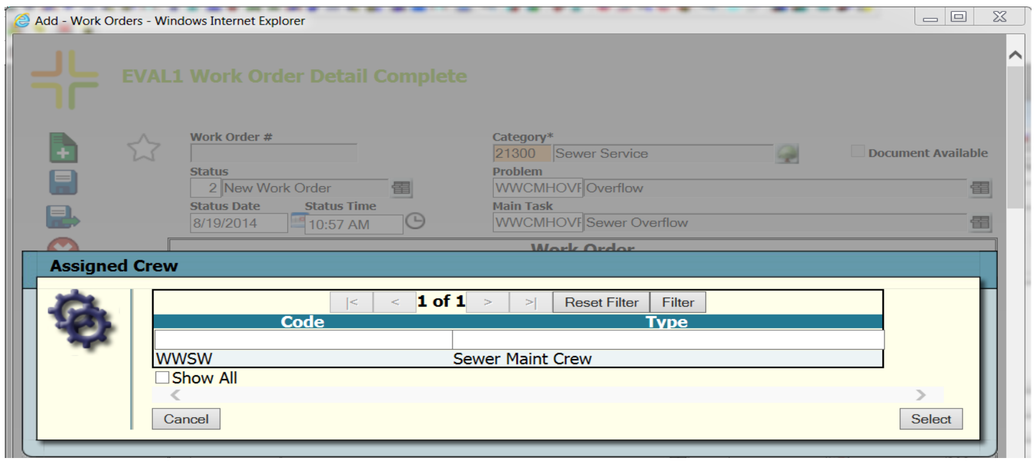
Category	Description	Rec #
	sewer	
20000	Sewer Department	89
21000	Sewer Collection	90
21100	Sewer Manhole	91
21200	Sewer Pipe	92
21300	Sewer Service	93
22000	Sewer Pump Stations	94
22100	Sewer Pumps	95
22200	Sewer Equipment	96
24000	Sewer Misc	99

11. Save and Close 

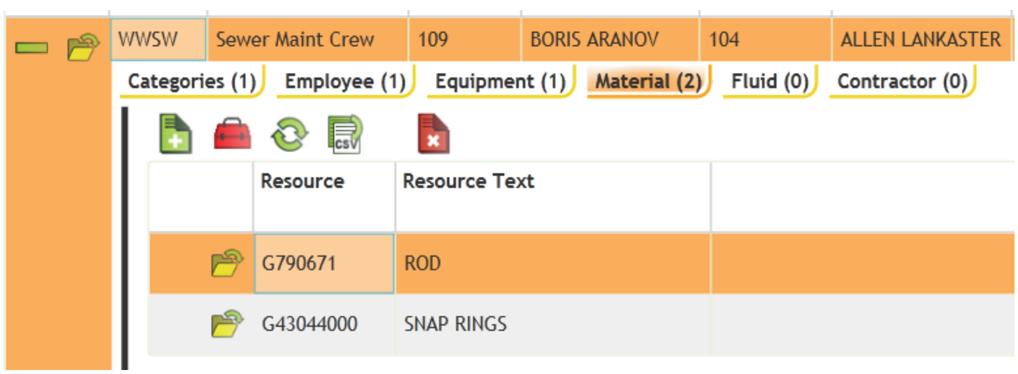
12. This Crew now has one category associated to it. More can be assigned the same way.



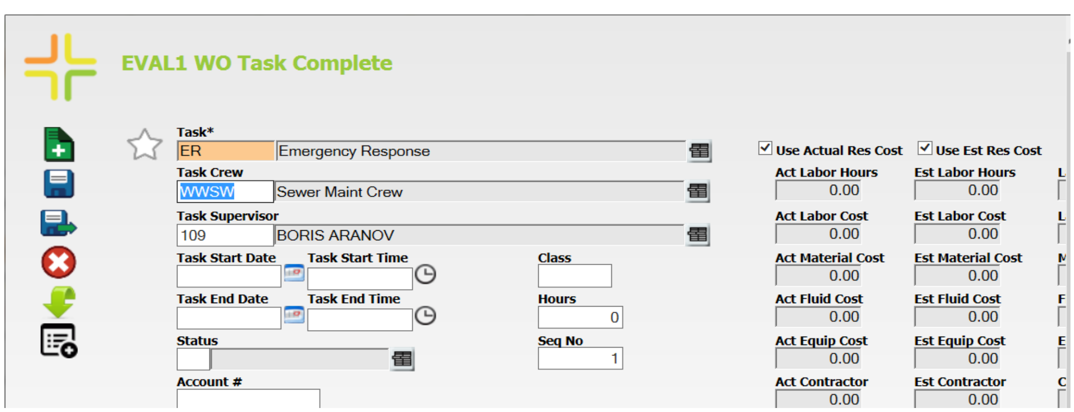
13. Adding Employees, Equipment, Material, Fluids and Contractors is accomplished the same way.
14. After you've saved your *Crew* record, you'll be able to select this crew in the *Work Order Form when creating a new work order for that category*



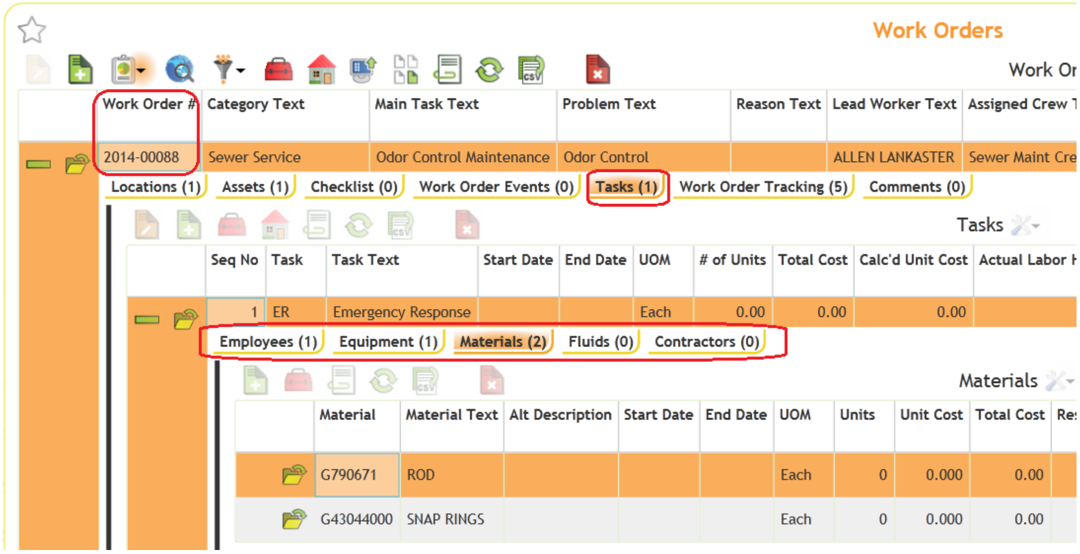
15. As you can see below, after adding resources to the Crew



16. Then using that crew on a Work Order task



17. All of the resources (Employees, Equipment, and Material) that were associated with our Sewer Maint Crew have been automatically entered by the system into the *Work Order* module's Resources grid.



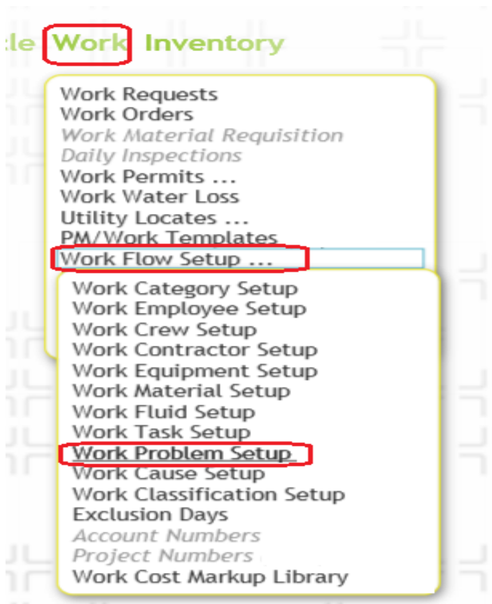
Notes:____

Problems

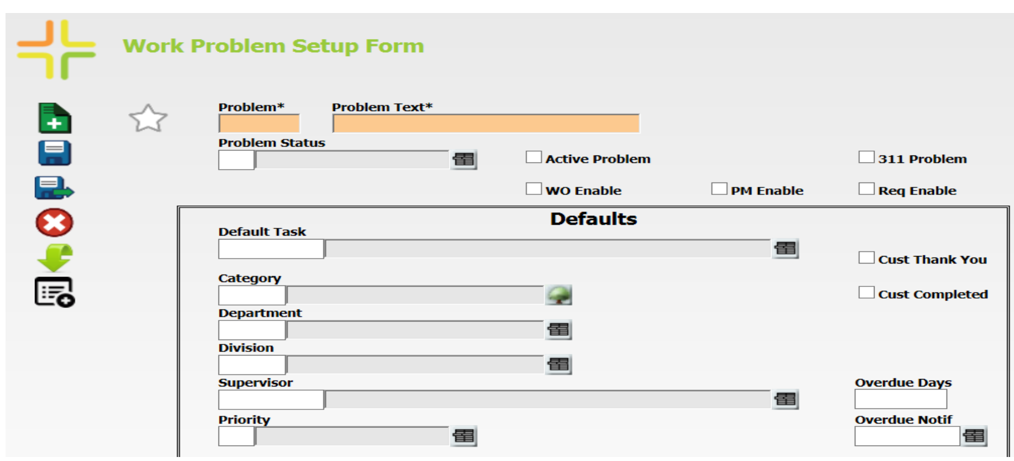
In this next *Work Flow Setup* step, we'll discuss how to create records for problems that result in work orders. All of the records that you enter into the *Problems* module will be added to the pick list used throughout the *Work* module. When you select a problem from the list in *Work Orders*, the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

It's important to keep in mind that problems are different from causes in *Work Flow Setup*. A problem is something that generates a work order. This includes sewer stoppage, sewer odor, pothole, missing sign, etc. A cause is something that creates a problem, such as weather, flooding, vandalism, or accident.

1. Open **Modules>>Work>>Work Flow Setup>>Work Problem Setup** from the Web application Modules menu.

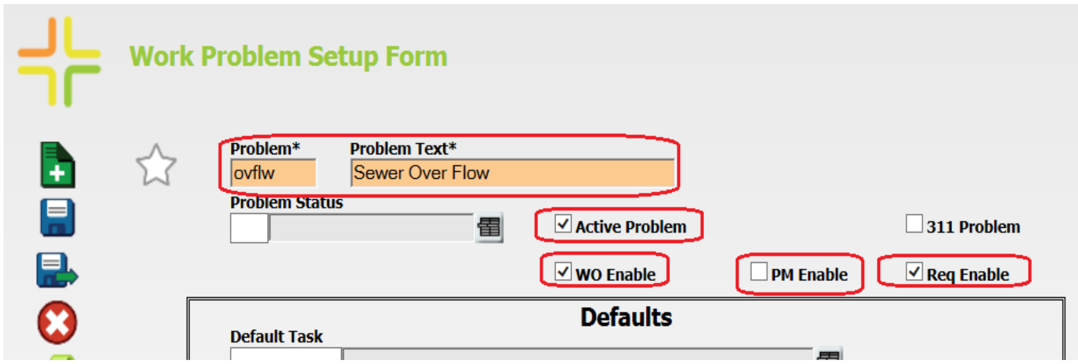


2. Click the *Add* button  to enter a new record.
3. Problem Setup Input Form is displayed.

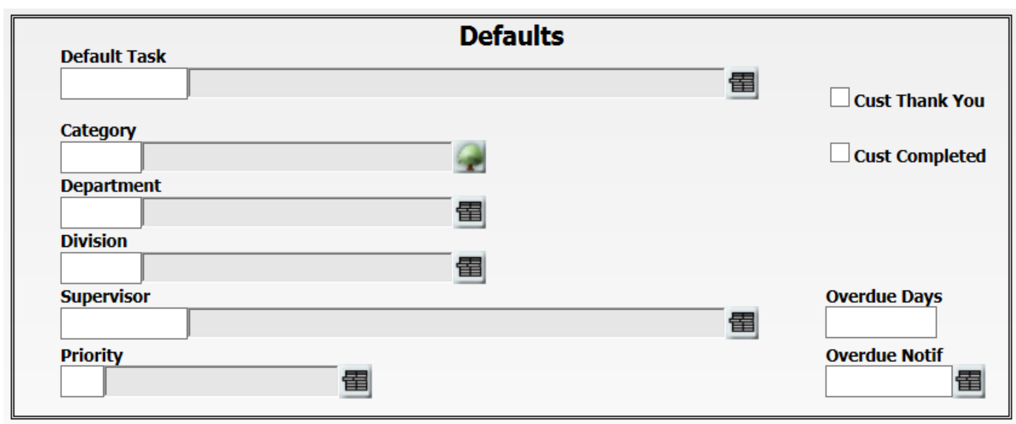


4. Input a problem code and problem text.

> *Note: If* ☑ Active Problem *is marked, the Problem will be designated as active, if this is not selected the problem will not appear in any pick lists throughout the system. The* ☑ Req Enable *and* ☑ WO Enable *must be selected to allow the problem to be selectable from either the Work Order Module or Request Module. If this box is not marked, the Problem will not be available for selection in either Module.*



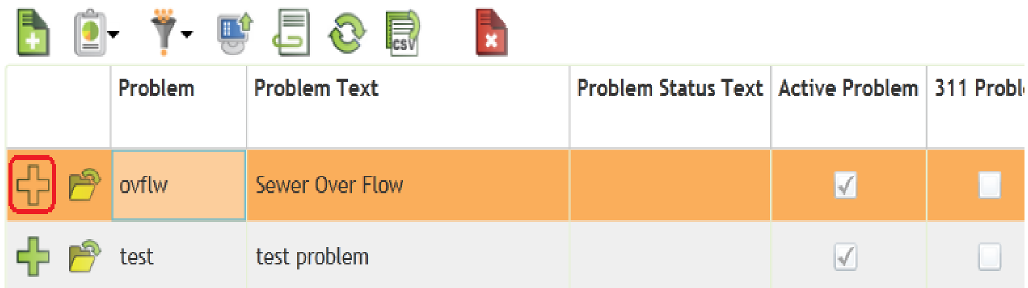
5. Select any defaults you want associated with this problem
   a. Default Task, Category, Department, Division, Supervisor, Priority entries will all be carried to a work order if selected



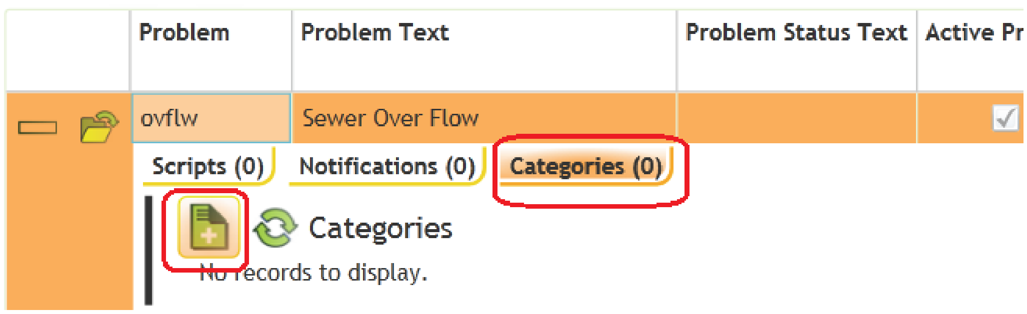
   b. Notifications for Problems are driven by the use of Overdue Days / Overdue Notif and will be covered later in this document.
   c. Citizen response emails are used if ☐ Cust Thank You ☐ Cust Completed are checked

6. Save and Close 

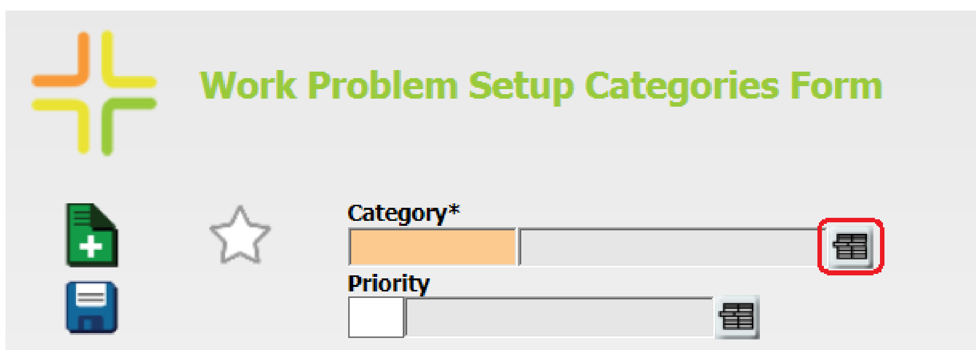
7. Locate the newly created problem on the grid and click on the expand button to assign categories it can be used in.



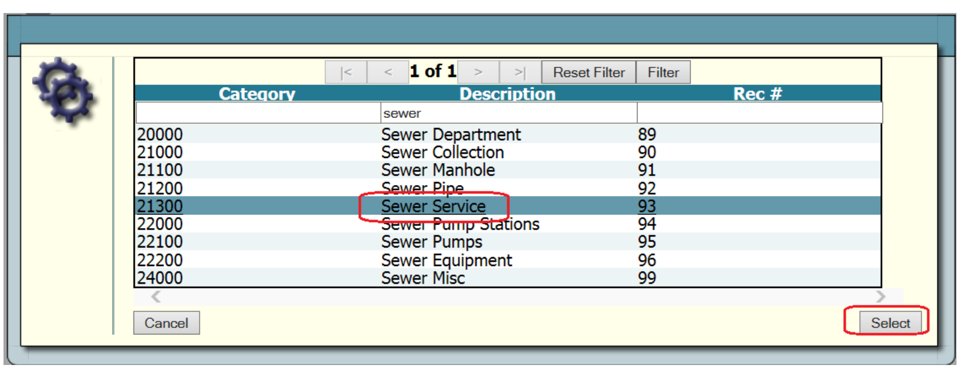
8. Click on Categories and Add Record



9. Open the Category list.



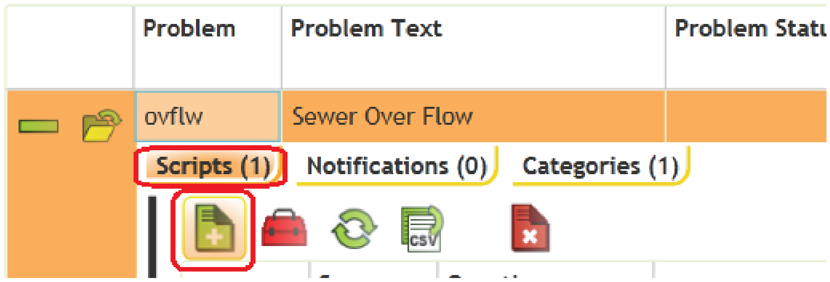
10. Select Category and define a default Priority if wanted.



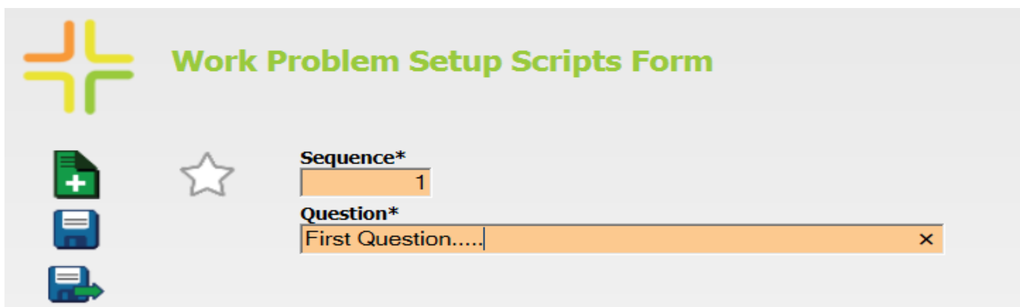
11. Save and Close .

12. **Problems can also include Scripts**, questions to be asked of the customer calling in a request.

13. To add a Script click on the Scripts Tab.



14. Select add a record .
15. **Enter your Script.**



16. And Save the Script , enter more scripts  or close the record .

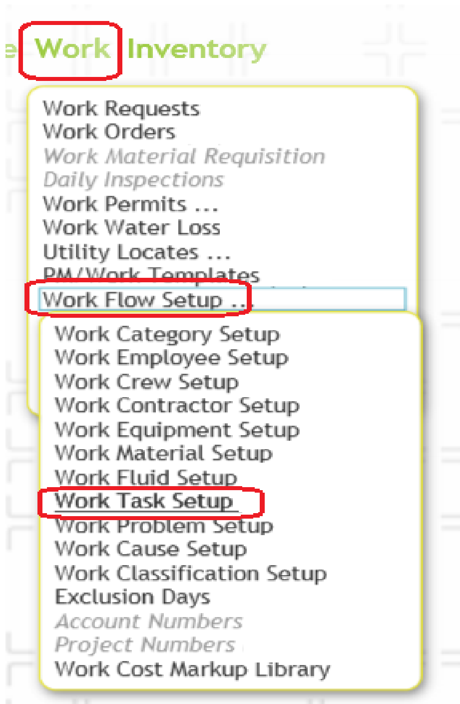
These scripts will be automatically carried over to the work order when this problem is selected.

Notes:____

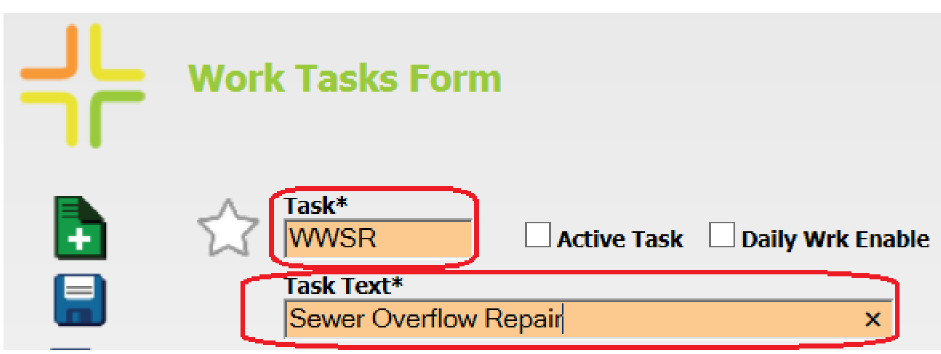
Work Tasks

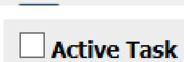
After establishing categories, creating resource records, and entering problems, you'll want to create records in the *Work Tasks* module for each task performed when completing a work order. Each task record you create is added to pick lists used throughout the *Work* module. The task records consist 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 Modules>>**Work>>Work Flow Setup>>Work Task Setup.**



2. Click the *Add* button  on the toolbar to enter *a new record*.
3. Enter a Task Number and Task Text



4. Check 

to make the task active, this is required for the task to appear in any system pick lists.

5. Check ☐ **Daily Wrk Enable** to make this task usable in the Daily Work Module

6. Check ☐ **Main Task** to make this task selectable as a Main Task on a Work Order

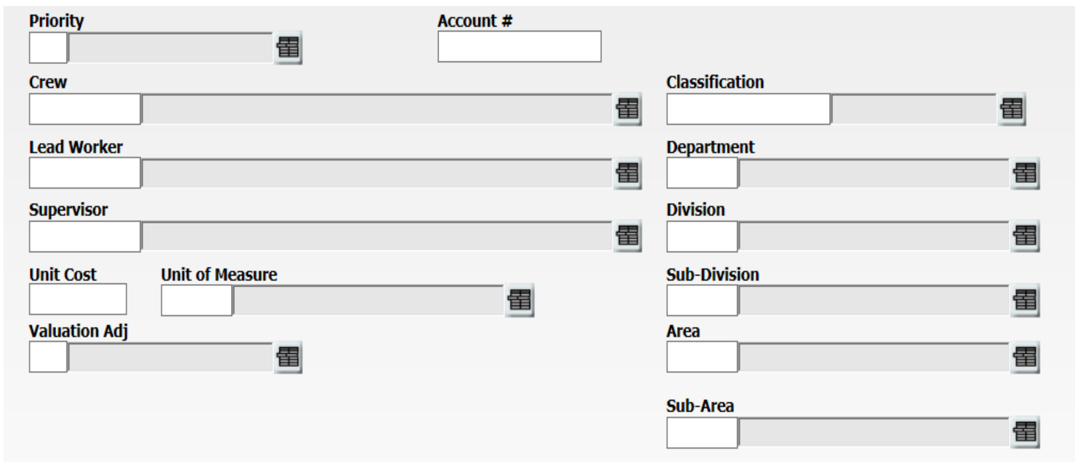
7. Check ☐ **Sub Task** to make this task selectable as a Sub Task to record hours against.

8. Check ☐ **PM Enable** to make this task selectable in the PM/WO Template Module.

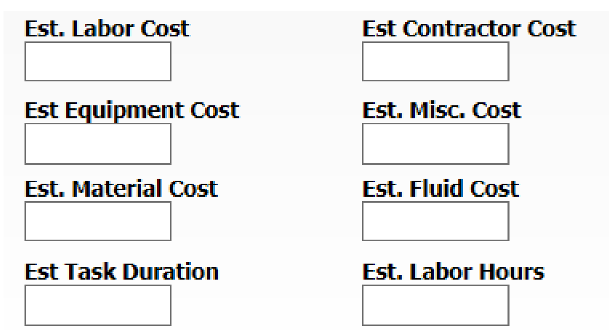
9. Check ☐ **WO Enable** to make this task selectable in the Work Order Module.

10. Check ☐ **Timesheet Enable** to make this task selectable in the timesheet Module.

11. Select any other default fields that you would like to auto-populate the work order with when this task is used.

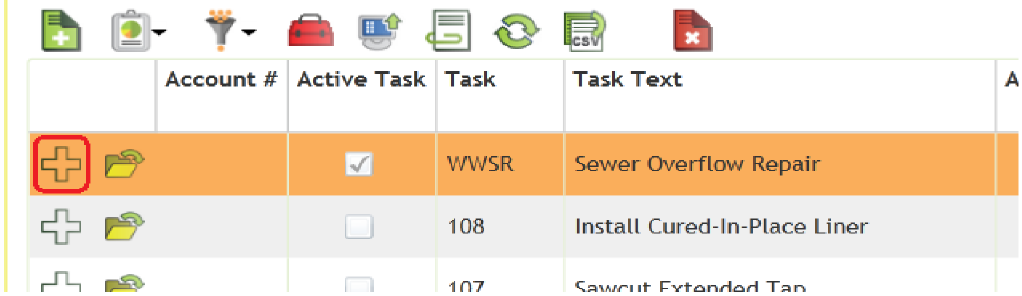


12. Input any Estimates in to the appropriate fields if desired.

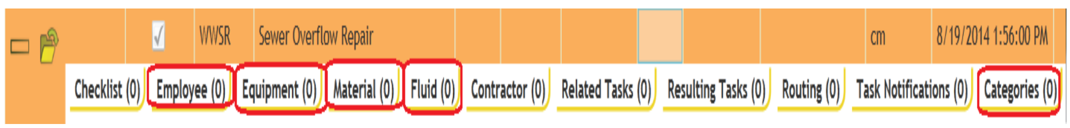


13. Click Save and Exit 

14. Expand the new task.



15. Categories, Resources, Checklists, etc. are all added in the same way as above. You'll generally include information in the following important areas:



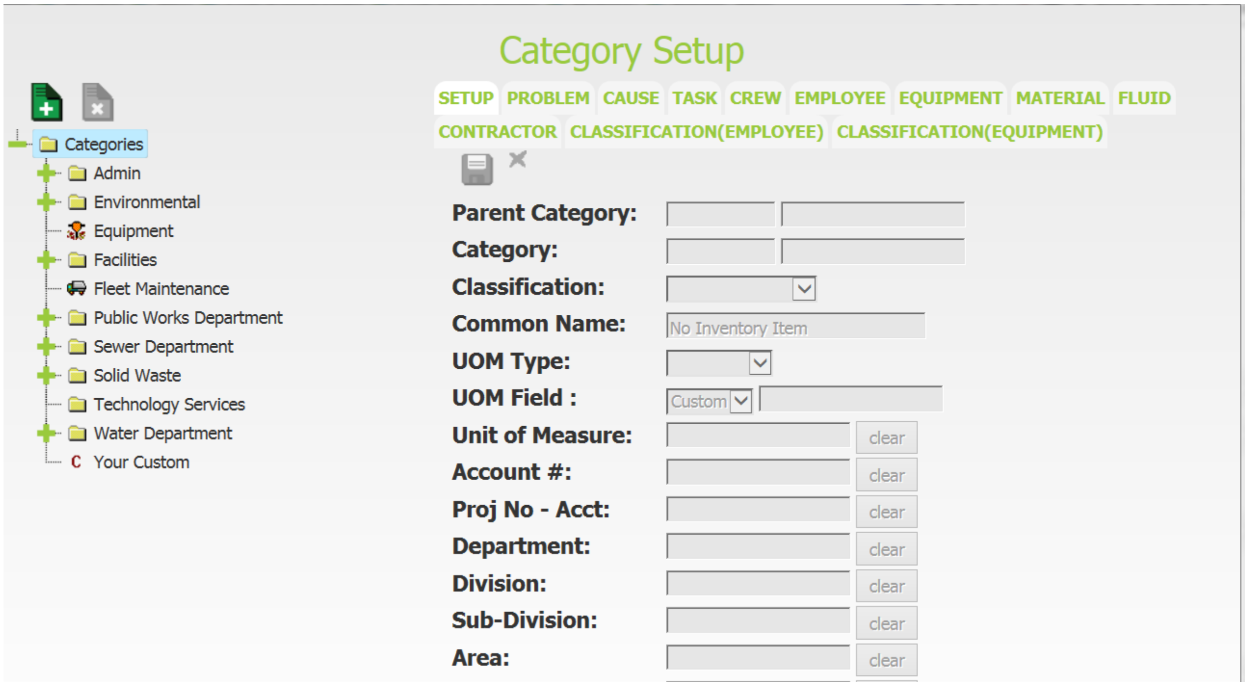
- **Resources** – Associate Employees, Materials, Fluids, Equipment with a task. Makes the resources available for use on a work order when the task is selected as the Sub Task.
- **Categories tab** – Associate a category(s) with a task. Makes the task available when a category is chosen in the *Work Orders* module.

Associating Resources

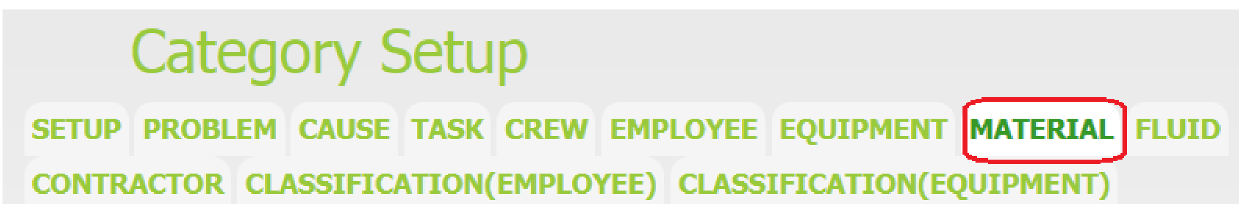
Once you have created categories and sub-categories, you can begin associating resources from the other setup modules (*Equipment*, *Materials*, *Tasks*, *Employees*, *Crews*, etc.). Associating resources with a category enables the *Work* module to automatically populate resource data when a category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

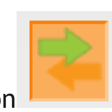
1. Navigate to **Modules>>Work>>Work Flow Setup>>Work Category Setup**

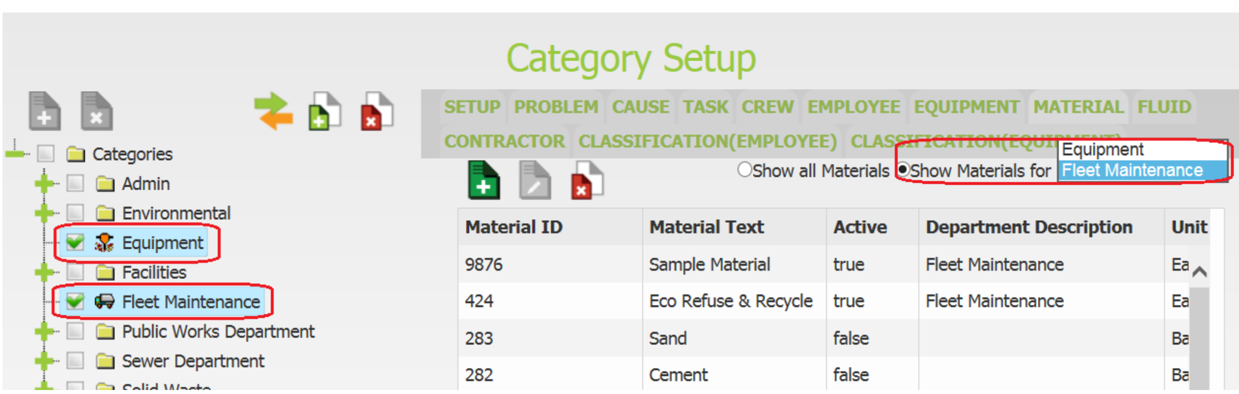
2. The Main Category Display will appear; from this screen you can associate all resources types with categories.



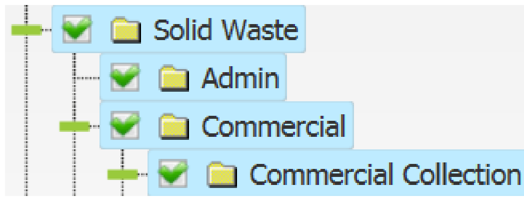
3. Select the appropriate resource tab. For example, if you want to associate a material with a category, you would select the Material tab.



4. Click the Start/Stop Linking Categories Icon . Your Categories tab greys out since you are editing the materials, (tab we had selected). Click on the check boxes of the categories you wish to share resources between. Your Show materials pick list now includes all the Categories you have selected.



5. Highlight the resources you want to share (more than one if you want) and click  to attach, or  to detach between the categories
   - Note that the resource will be automatically associated with that category and all sub-categories if you are assigning it to a higher level category.



6. You can also click on the Show all Materials button to reveal a list of all resources included in the Material setup module to add resources as well.
7. These same steps apply to linking, tasks, causes, crews, etc. You can associate as many resources as needed with your categories. Each resource can be associated with more than one category.

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 Modules>> *General*>>*Notification Setup*. Notification templates can be used for several modules, throughout Lucity. 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:

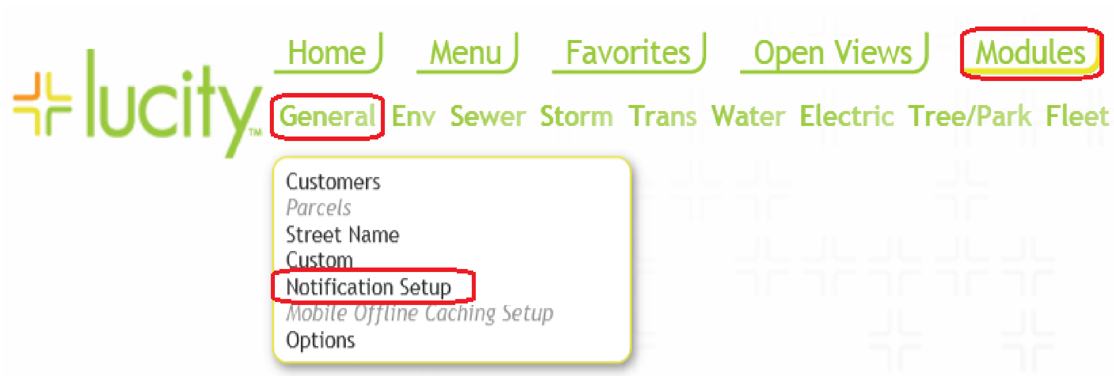
- To automatically alert employees and supervisors when a new work order is created and assigned to them.
- To alert employees that the problem in a request or a task in an open work order has changed or is past due.
- To thank customers for their requests (Thank You email).
- To inform customers that 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, Lucity 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.

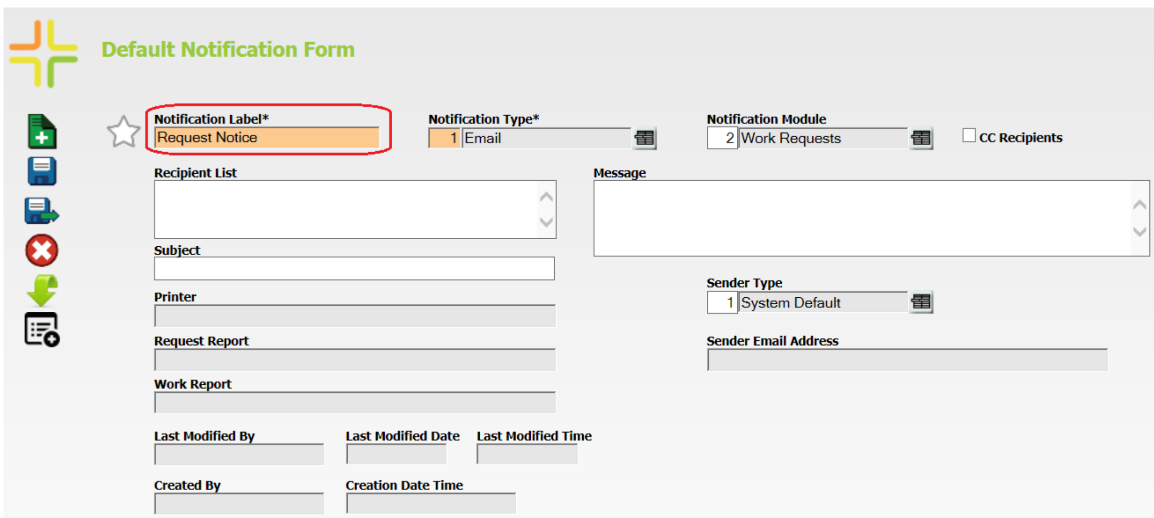
> ***Note:*** *For any email notifications to be sent, the Lucity Services must be installed on the server.*

Creating Email Notifications

1. Open the *Notification Setup* module by selecting Modules>>**General>>Notification Setup** from the Web application Modules menu.

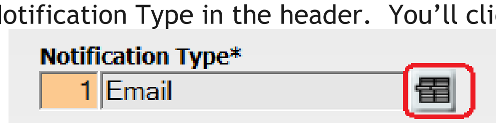


2. Click the *Add* button  on the toolbar to enter *a new notification record*.



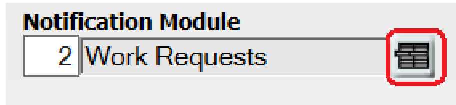
3. Enter a unique notification label. This allows you to easily identify your template.

   - 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.

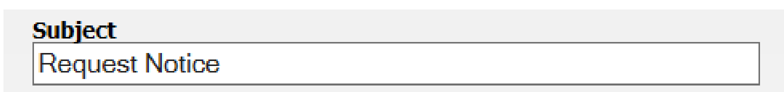
    - For our example we chose Work Request.

6. In order for the email message to be sent, you'll need to include an email address in the recipients list. 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.

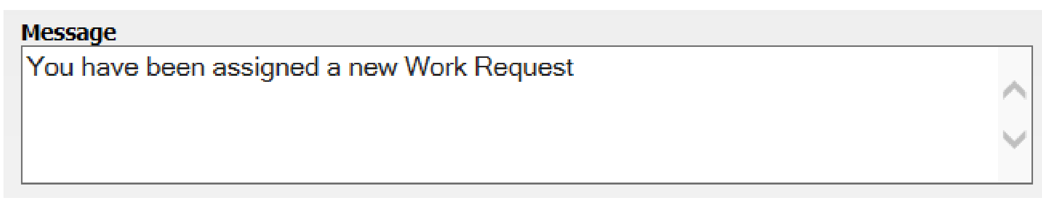
    - You can choose to include multiple emails in the recipient list. Use a semi-colon to separate the email addresses.

    - For this 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.

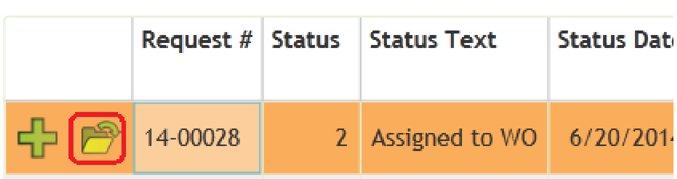


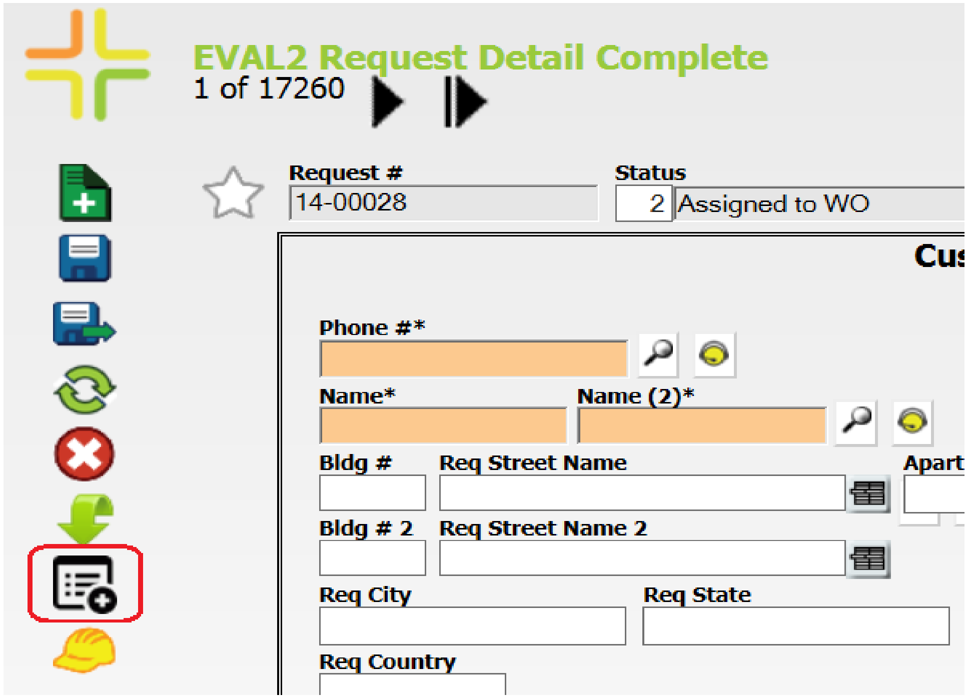
8. Message field, type what you would like to appear in the email body text.



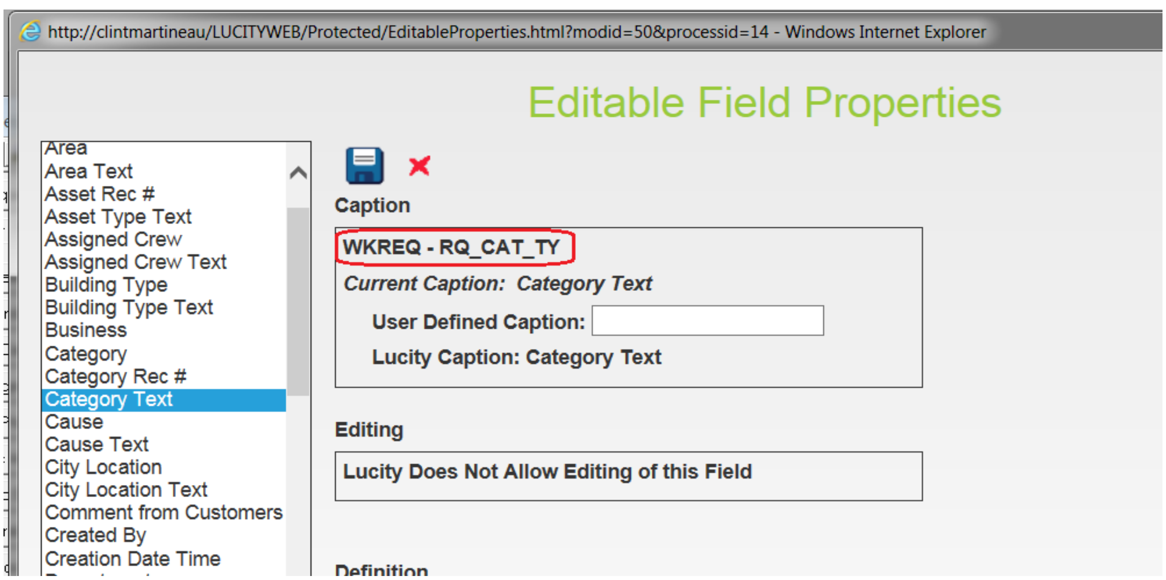
9. You can automatically insert field data from the work order or request into the subject line or email body of a notification.

    - Data can be auto-inserted from the main tables, which are dependent on what notification module was selected. In this example we used the Request Module so the fields that are usable are from the Request Module (WKREQ) fields (i.e. RQ_NUMBER, RQ_MEMO1, etc.).
    - To auto-insert data, enclose field names in brackets [].
    - In this example we have opened up a request form in the web.

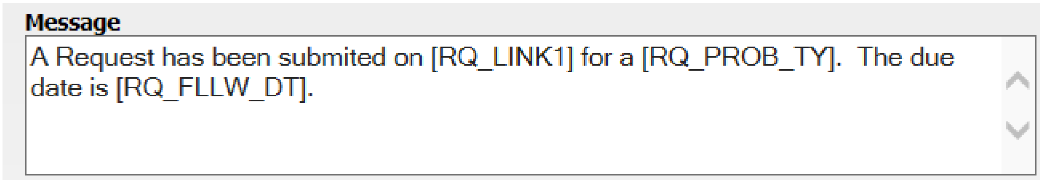




- Field names can be found by clicking the properties  in each module and selecting a field. The Table & Field Name will be listed in the Caption box. Since this Notification Type is a Request all that is needed is the field name.



- 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.10/15/2014]."

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, 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.)

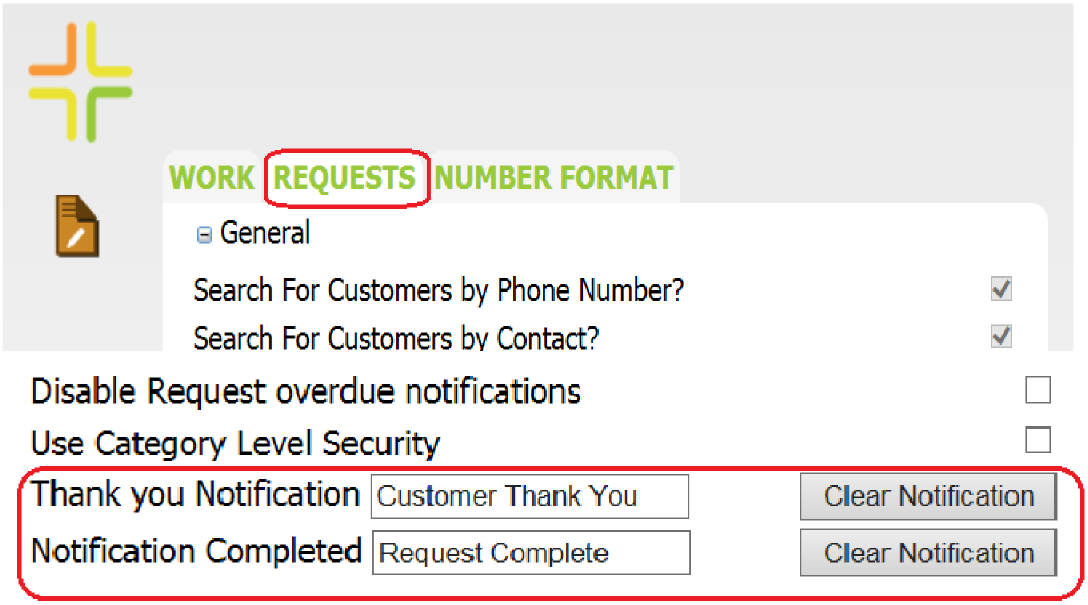
When are the notifications sent?

- '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 *General>>Options>>Work Options* module.

1. Open Modules>>**General>>Options>>Work Options** from the Web application main menu.

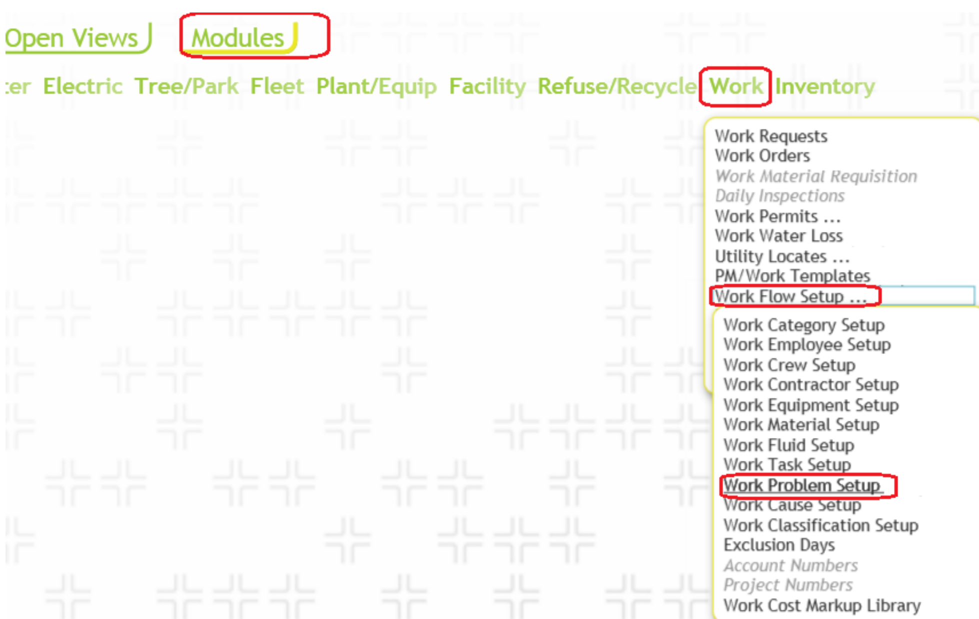
2. Select the Edit Button, , Click on Requests tab and scroll to the bottom



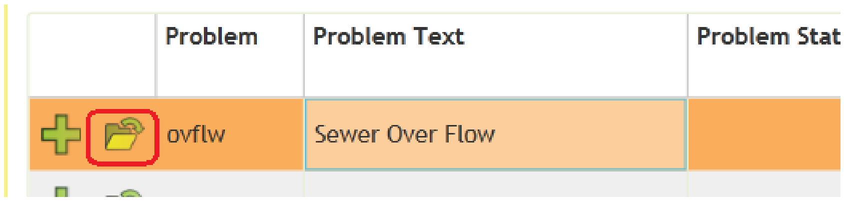
3. Enter the Notification Label for each of the notifications you want to use.
4. Now whenever a customer notification is triggered, these notification templates will be used.

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, and is selected on the request.

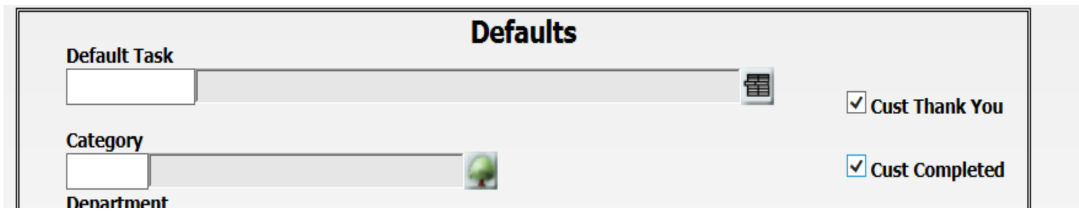
1. To turn the Customer Notifications on for a problem go to the Modules>>Work>>Work Flow Setup>>Work Problem Setup.



2. Find the problem(s) to turn this notification on for, and click the view form button.



3. Mark the Cust Thank You and/or Cust Completed fields.



4. Save and close the record. 

5. Now whenever this problem is selected on a request the corresponding notifications will be sent.

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

Overdue Problem Notifications

Email notifications are also used to inform employees of overdue requests or work orders. 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.
- 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 for the specific problem*.

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 recipients list.

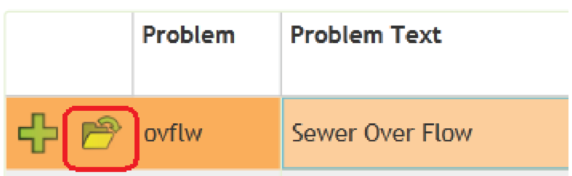
When are overdue notifications sent?

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

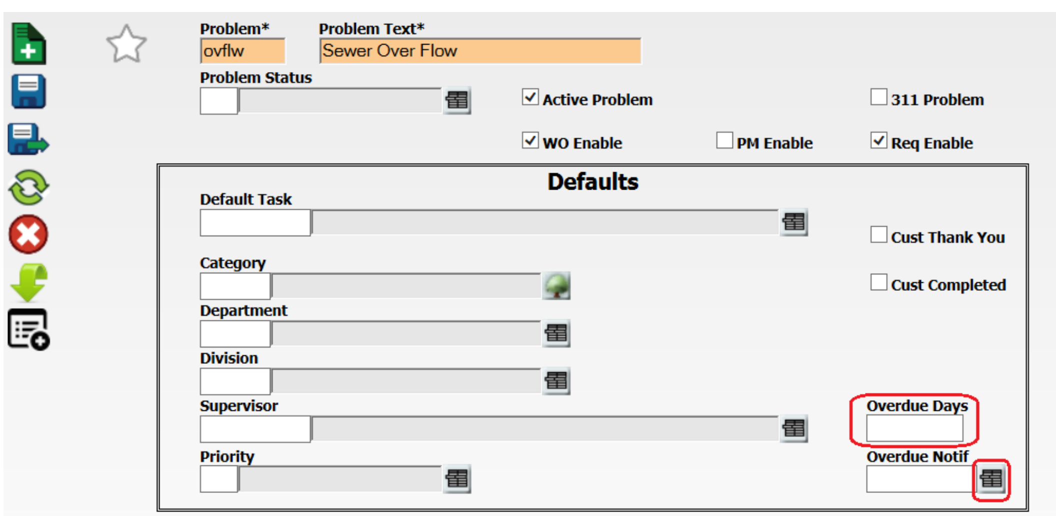
You'll need to set up default overdue notifications in the *Work Flow Setup, Problems* module.

1. Open Module>>**Work>>Work Flow Setup>> Work Problem Setup** from the Web application main menu.

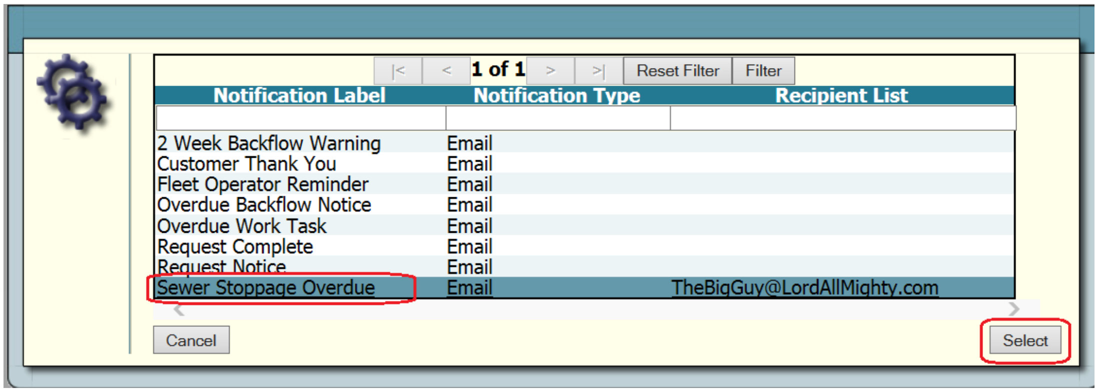
2. Find the problem for which you'd like to setup a default notification.



Then click to open the web form.

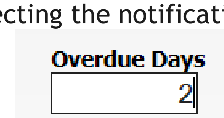


3. Click the Overdue Notif field caption button to access the pick list. Then, select the notification template you would like to use.



4. For our example, we're using the Sewer Overflow Problem.

5. After selecting the notification to be sent when a problem is overdue look at the Overdue Days field.



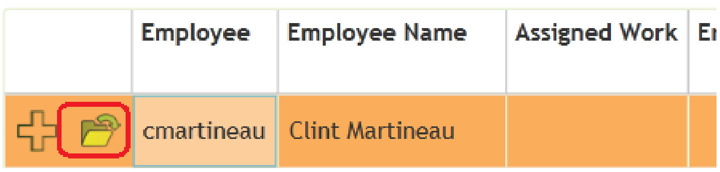
Enter the number of days between when the request is created and when it is considered overdue. This number is used to calculate the follow-up date.

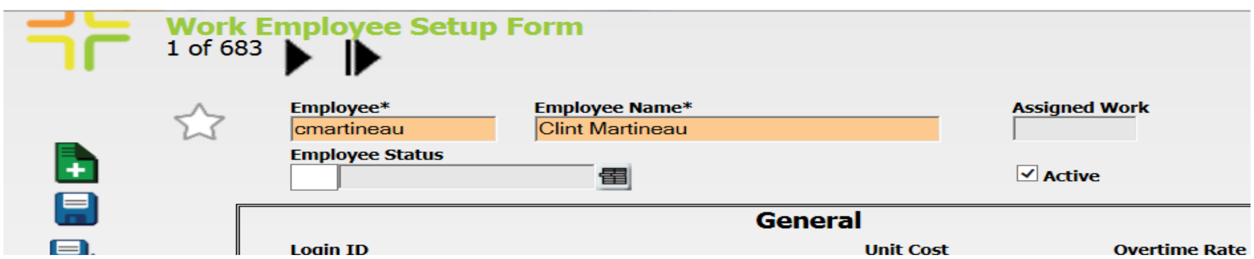
Notes:____

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.

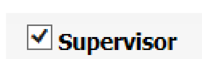
1. Go to Modules>Work>Work Flow Setup>Work Employee Setup.

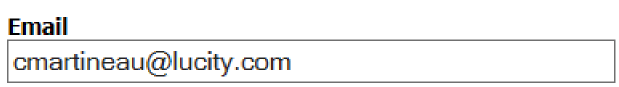
2. Locate the Employee you want to have receive supervisor Emails and open the web form .





a. The Employee must be an active employee 

b. Selected as a Supervisor 

c. And have a valid email address 

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 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?

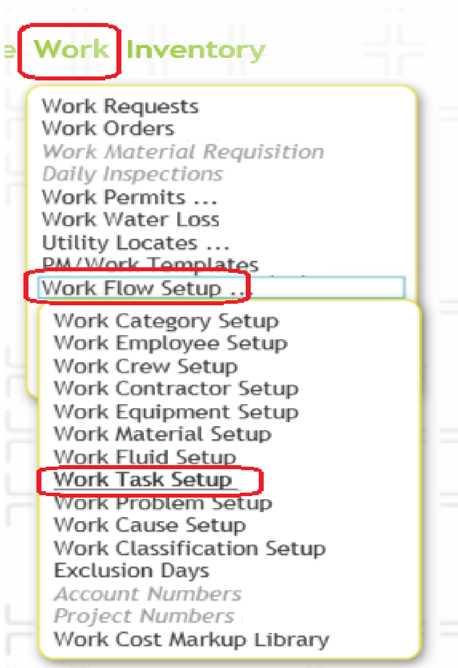
- The overdue notification is always sent to the supervisor's email, but can be sent to additional recipients based on what you set up in the *Notifications* module Recipient List.

When are overdue notifications sent?

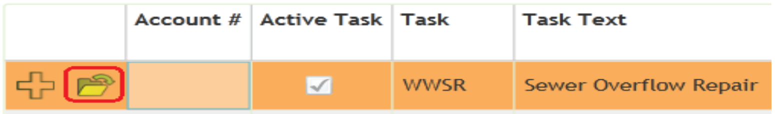
- Overdue notifications are processed each night on the server. They are dispatched by the *Work Orders* module.

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

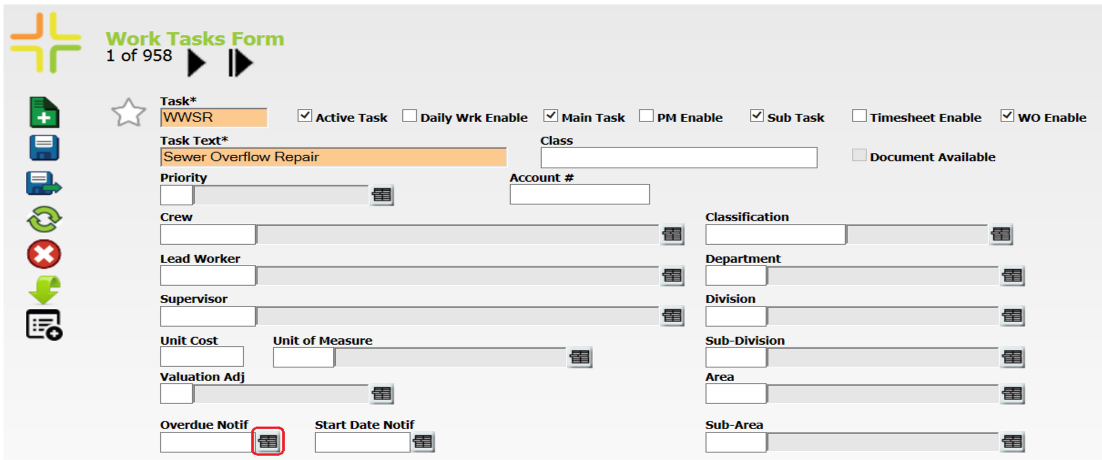
1. Open Modules > Work > Work Flow Setup > Work Task Setup.

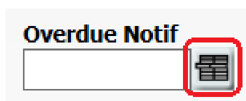


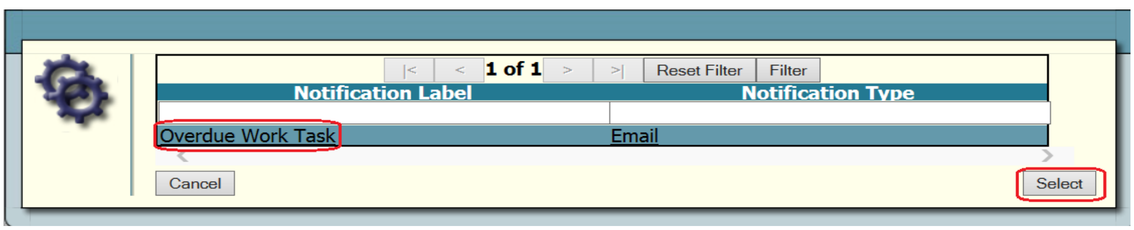
2. Find the task for which you'd like to setup an overdue notification.

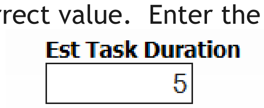


Click  to open web form.



3. Click the Overdue Notif field  caption button to access the pick list.



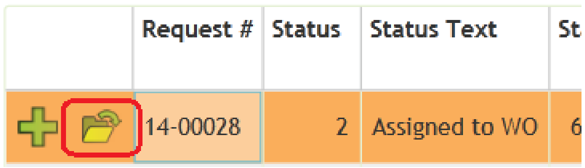
4. Then, select a notification template (like the one you created before).
   - For our example, we're using the Sewer Overflow Repair Task and assigning the Overdue Work Task Notification.
5. After choosing the notification to send, fill out the Est Task Duration field if it is not defaulted to the correct value. 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.

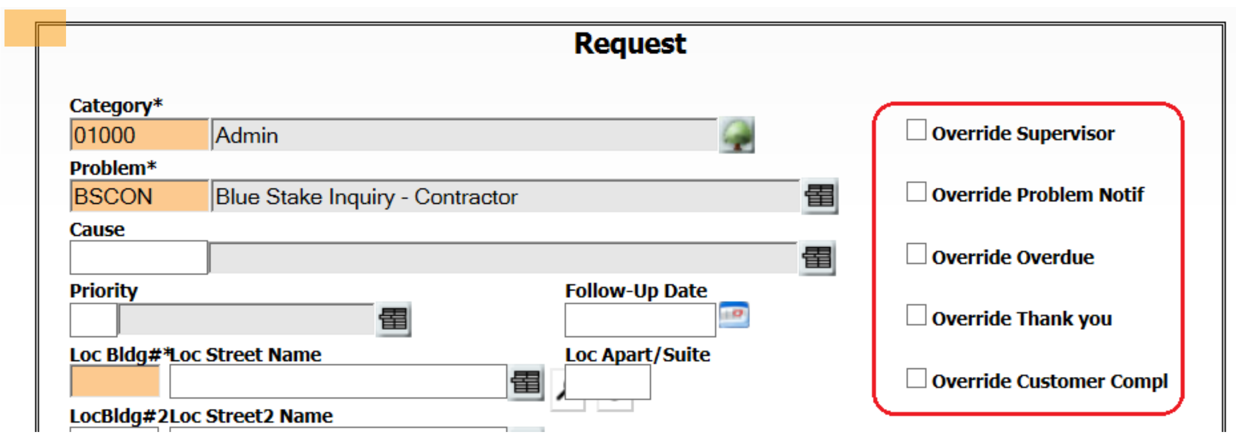
Note - To make sure that the request supervisor receives an email they need to have their email address specified on their employee record in the Work Flow Setup as shown on page 32.

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 in the *Work Requests and Work Order* module.

    - Simply open the Work Request or Work Order and mark the checkboxes for whichever notifications you wish to be overridden. By marking these boxes, the system will NOT send the corresponding emails.
    - 



Notes:____

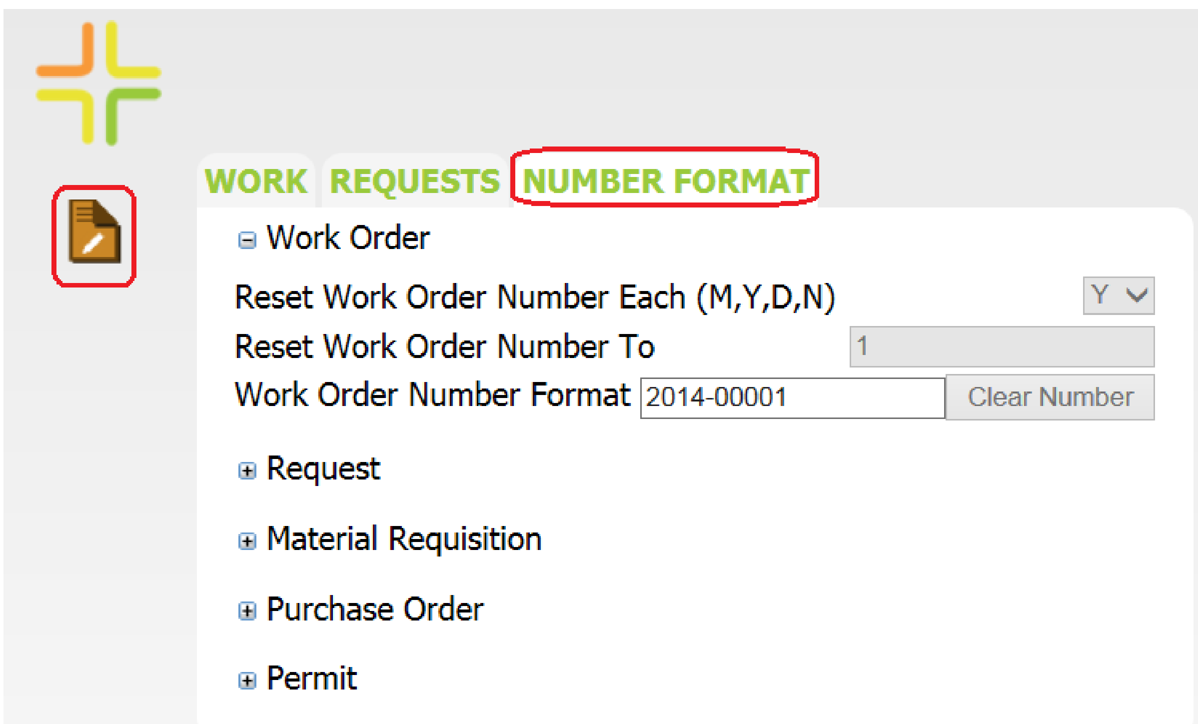
Work Options

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 Modules>>General>>Options>>**Work Options>>Administration>>Work Options from the Web** application main menu.

Numbering Format

Click on the Numbering Format tab for options for *Material Requisition*, *Work Orders*, *Work Permits or Work Requests*.

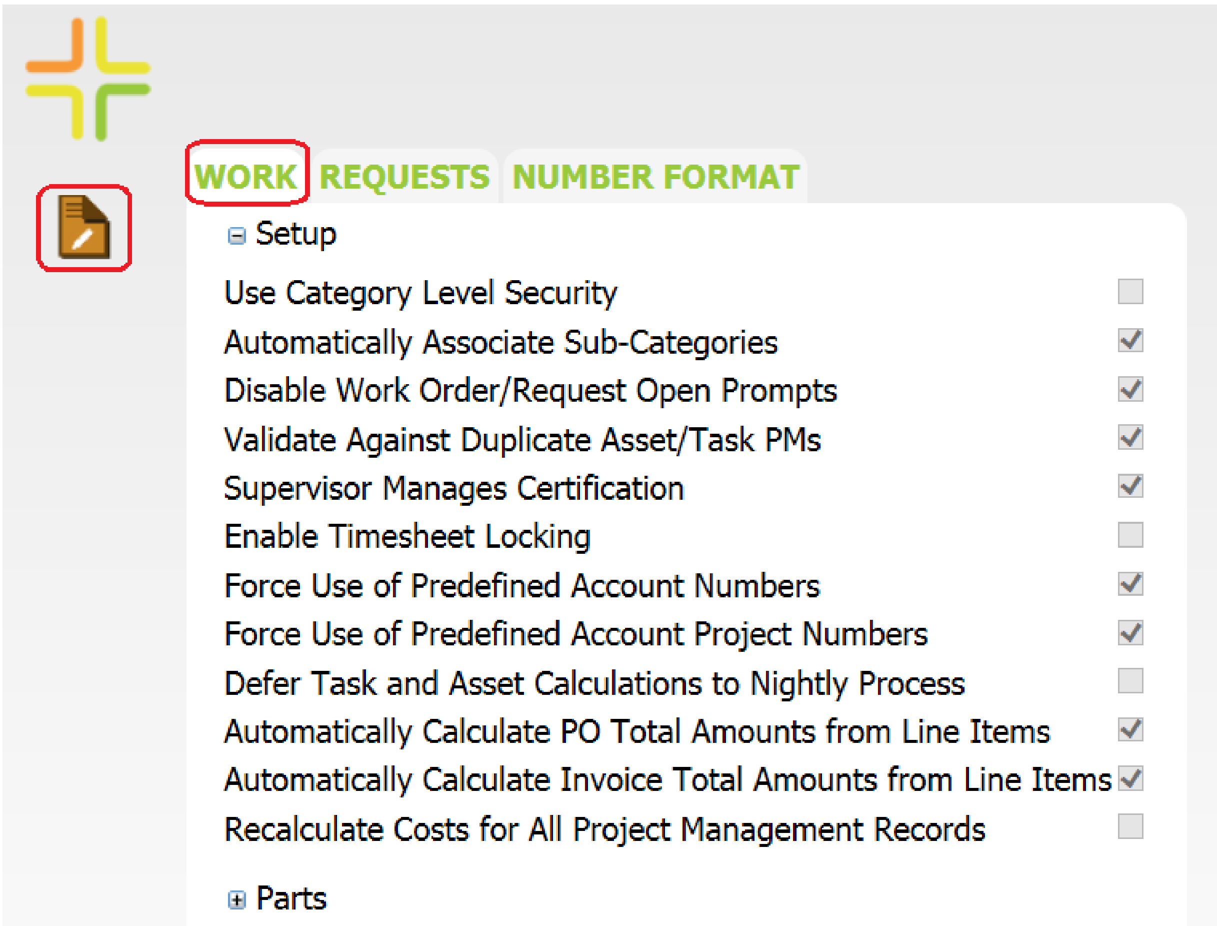


Click  to start editing the settings. Expand or collapse each line to make changes to the numbering format of each module.

Editing Work Options

Follow the steps below to turn on or off Work options.

1. Click the Work Tab, Click Edit button  on the module toolbar to enter *Edit Mode*.

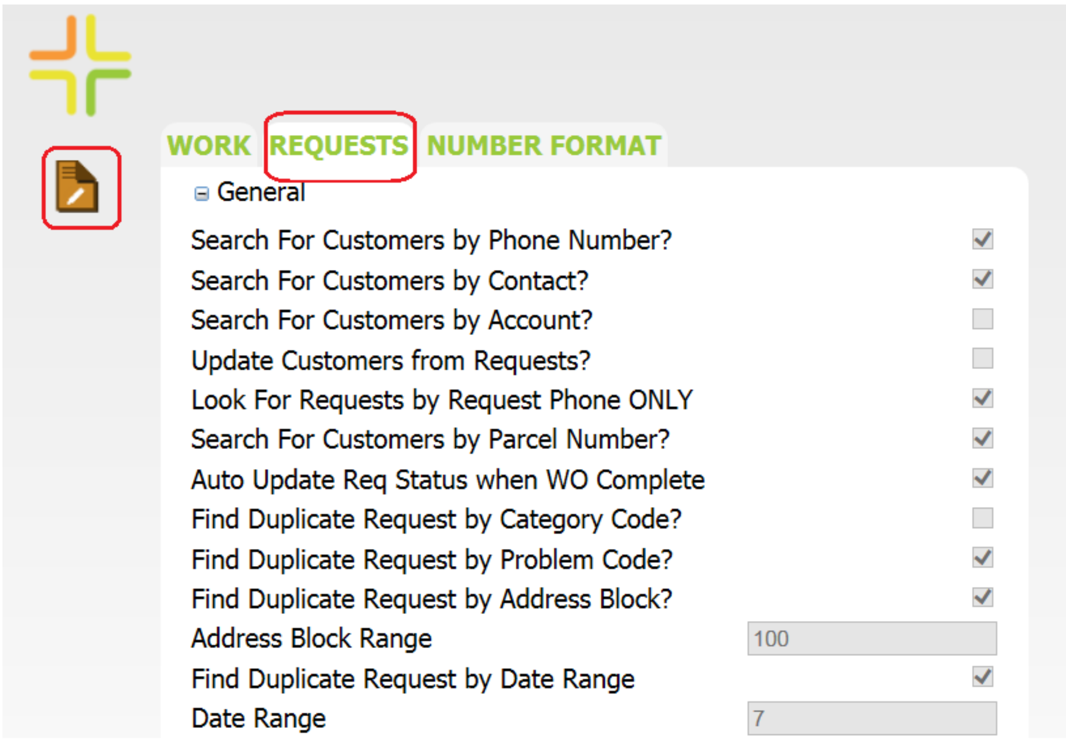


2. Expand or collapse each line to make changes to each module.
   - Check or Uncheck in the field provided to turn on or off 'Yes' or 'No' options.
   - Type a number (or other character) in fields where it is indicated.
   - Select the appropriate option from the pick lists where indicated.
3. Click  to save your selections or  to cancel.
4. For more information about Work Options please see the Lucity Help Guide

Editing Request Options

Follow the steps below to turn on or off Request options.

5. Click the Request Tab, Click Edit button  on the module toolbar to enter *Edit Mode*.



6.
7. Expand or collapse each line to make changes to each module.
    - Check or Uncheck in the field provided to turn on or off 'Yes' or 'No' options.
    - Type a number (or other character) in fields where it is indicated.
    - Select the appropriate option from the pick lists where indicated.
8. Click  to save your selections or  to cancel.
9. For more information about Request Options please see the Lucity Help Guide

New to 14R2

- Work Flow Setup is now web form enabled.