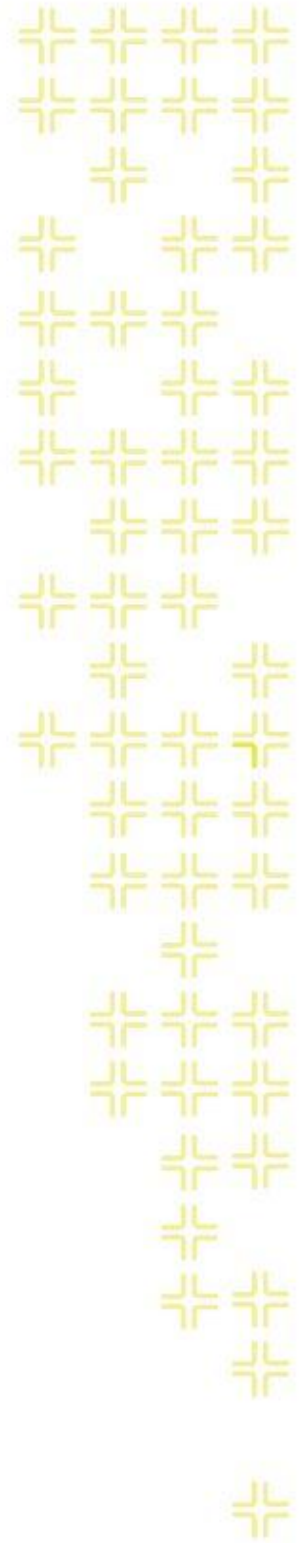




TRAINING GUIDE

Work Flow Setup Web



Work Flow Setup - Web

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 System Configuration Menu. However, Notifications are still important to the Work Flow setup so they will be discussed here.

Getting Started

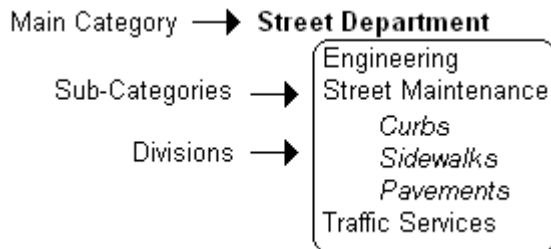
Before using the work flow setup modules listed above, we recommend creating an outline to help you better organize your infrastructure.

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




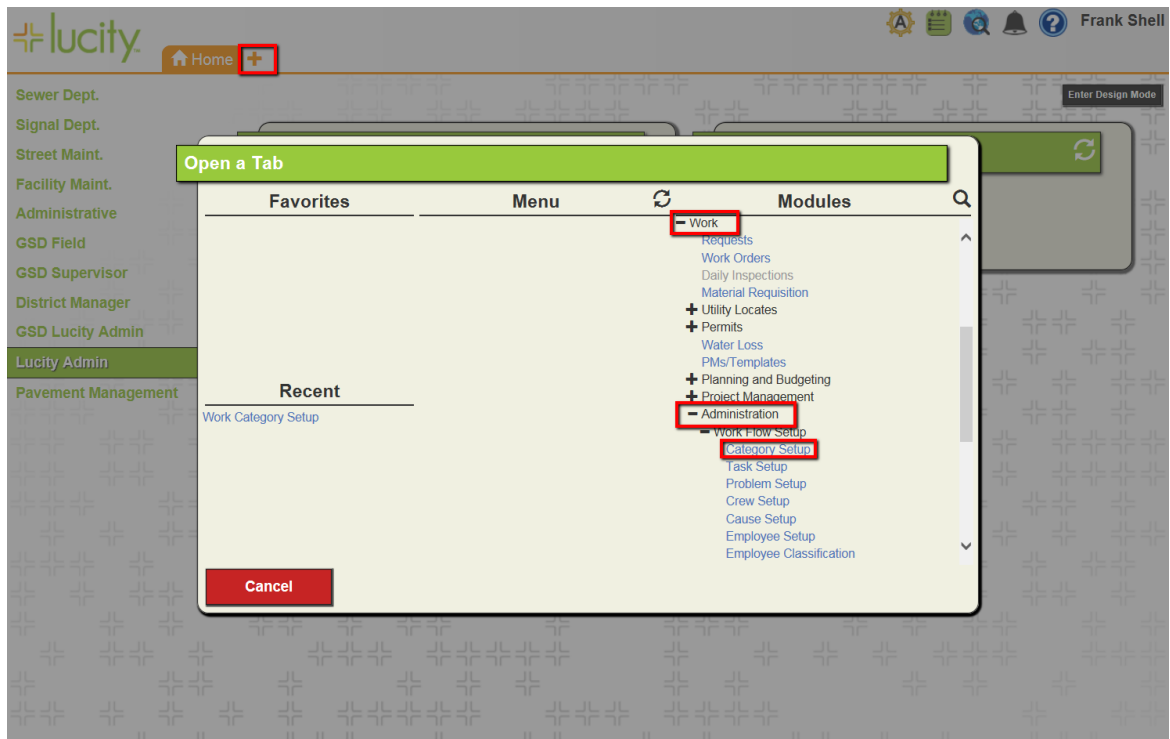
Next, you can group your resources (employees, equipment, materials, etc.) under the appropriate category or sub-category. For example, you may group street maintenance equipment, materials, tasks, problems, possible causes, and Street Department employees under the Street Maintenance sub-category.


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.

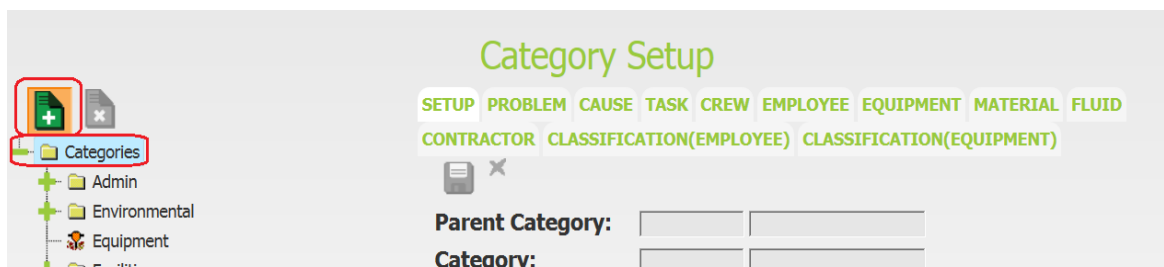
Notes: _____

Adding Categories or Sub-Categories

1. Open the *Categories* module by selecting the Open Tab icon  >>Work>>Administration>>Work Flow Setup>> Category Setup from the Open a Tab screen.



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.



Notes: _____

- 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.

Category Setup

SETUP PROBLEM CAUSE TASK CREW EMPLOYEE EQUIPMENT MATERIAL FLUID
CONTRACTOR CLASSIFICATION(EMPLOYEE) CLASSIFICATION(EQUIPMENT)

Parent Category: 50000 Facilities

Category: 51000 Facilities

Classification: Inventory Items

Common Name: No Inventory Item

UOM Type: Facility Roof

UOM Field: Facility Roof Asset

Unit of Measure: Facility Room

Account #: Facility Room Asset

Proj No - Acct: Facility Site

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

Category Setup

SETUP PROBLEM CAUSE TASK CREW EMPLOYEE EQUIPMENT MATERIAL FLUID
CONTRACTOR CLASSIFICATION(EMPLOYEE) CLASSIFICATION(EQUIPMENT)

Parent Category: 50000 Facilities

Category: 51000 Facilities

Classification: Classification

Common Name: No Inventory Item

- 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"

Category: 51000 Facilities Room Assets

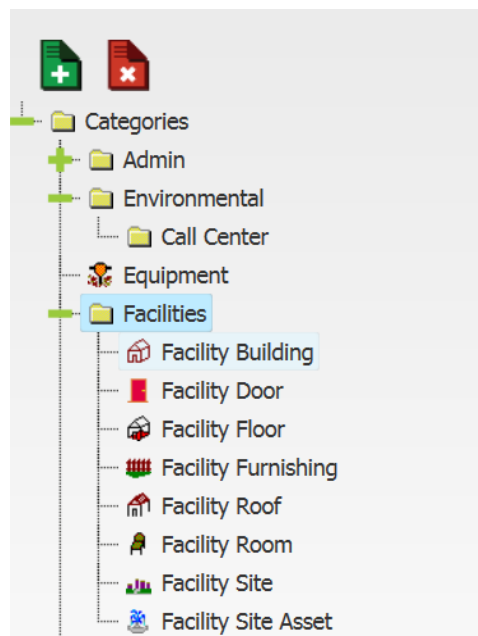
- Select a Classification from the drop-down menu.

- If you select **Classification:** Inventory Items, the Common Name field will be enabled and you will be required to populate it.
- If you select **Classification:** Classification, 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.

| | |
|-------------------------|--------------------------|
| Classification: | Inventory Items ▾ |
| Common Name: | Sewer Service |
| UOM Type: | Facility Floor Section |
| UOM Field : | Facility Furnishing |
| Unit of Measure: | Facility Irr Controllers |
| Account #: | Facility Irr Nodes |
| Proj No - Acct: | Facility Irr Pipes |
| Department: | Facility Irr Valves |
| Division: | Facility Roof |
| Sub-Division: | Facility Roof Asset |
| Area: | Facility Room |
| Sub-Area: | Facility Room 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.

| | |
|------------------|------------|
| UOM Type: | 1 -- Count |
| | 2 -- Sum |

- 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.

| | |
|---|----------------------------|
| Unit of Measure: | <input type="text"/> clear |
| Account #: | <input type="text"/> |
| Proj No - Acct: | <input type="text"/> |
| Department: | <input type="text"/> |
| Division: | <input type="text"/> |
| Sub-Division: | <input type="text"/> |
| Area: | <input type="text"/> |
| Sub-Area: | <input type="text"/> |
|    | |

| Code | Type |
|-------|--------------|
| 1 | Hours |
| 2 | Each |
| 3 | Count |
| 5 gal | 5 Gal |
| Acre | Acre |
| B-32 | 32 oz Bottle |
| bag | Bag |
| Bale | Bale |
| box | Box |
| Bunch | Bunch |

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



| | | |
|------------------------|----------------------|-------|
| Account #: | <input type="text"/> | clear |
| Proj No - Acct: | <input type="text"/> | clear |



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

| | | |
|-------------------------|----------------------|-------|
| Unit of Measure: | 2 -- Each | clear |
| Account #: | <input type="text"/> | clear |
| Proj No - Acct: | <input type="text"/> | clear |
| Department: | <input type="text"/> | clear |
| Division: | <input type="text"/> | clear |
| Sub-Division: | <input type="text"/> | clear |
| Area: | <input type="text"/> | clear |
| Sub-Area: | <input type="text"/> | clear |

12. Decide if the Category requires an Asset and/or Employee Time to complete and close a Work Order. Put a checkmark in the box if it does. If you would like to choose a PM template when creating a Work Order from a Request put a checkmark in the box beside Request WO Creation Shows PM Templates.

| | |
|--|--------------------------|
| Requires Asset to Close WO: | <input type="checkbox"/> |
| Requires Employee Time to Close WO: | <input type="checkbox"/> |
| Request WO Creation Shows PM Templates: | <input type="checkbox"/> |


 

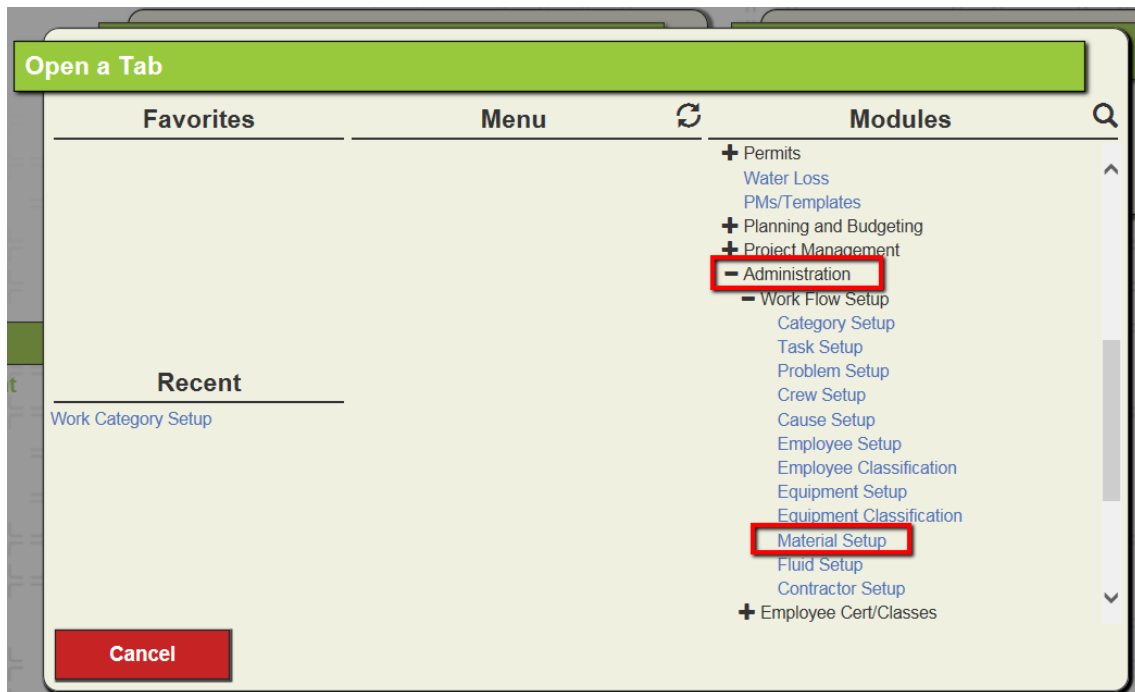
13. Save  your new category. Or Save and Submit another 

Notes: _____

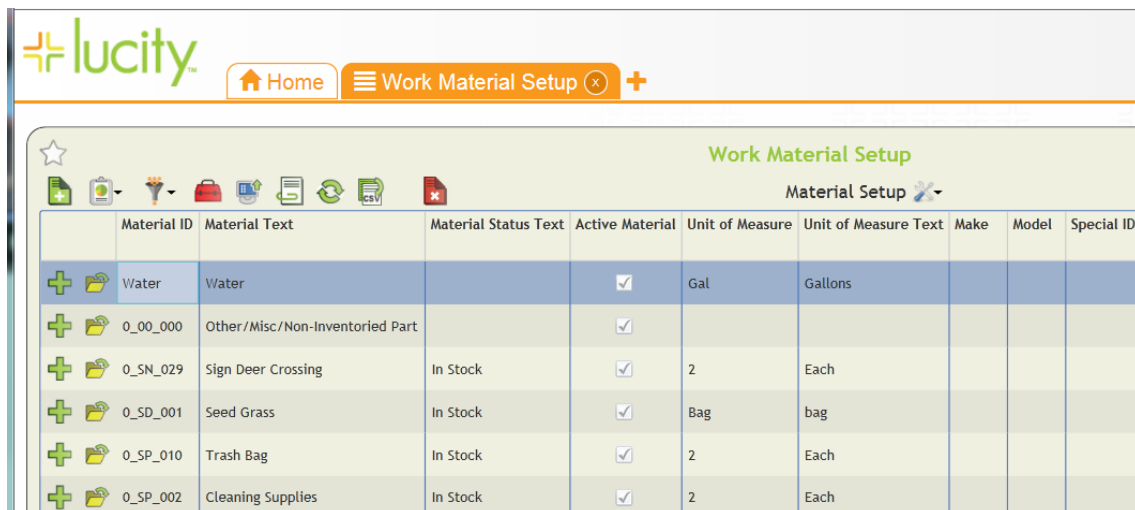
Resources







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 the Open Tab icon 
>>Work>>Administration>>Work Flow Setup>> **Material Setup**.

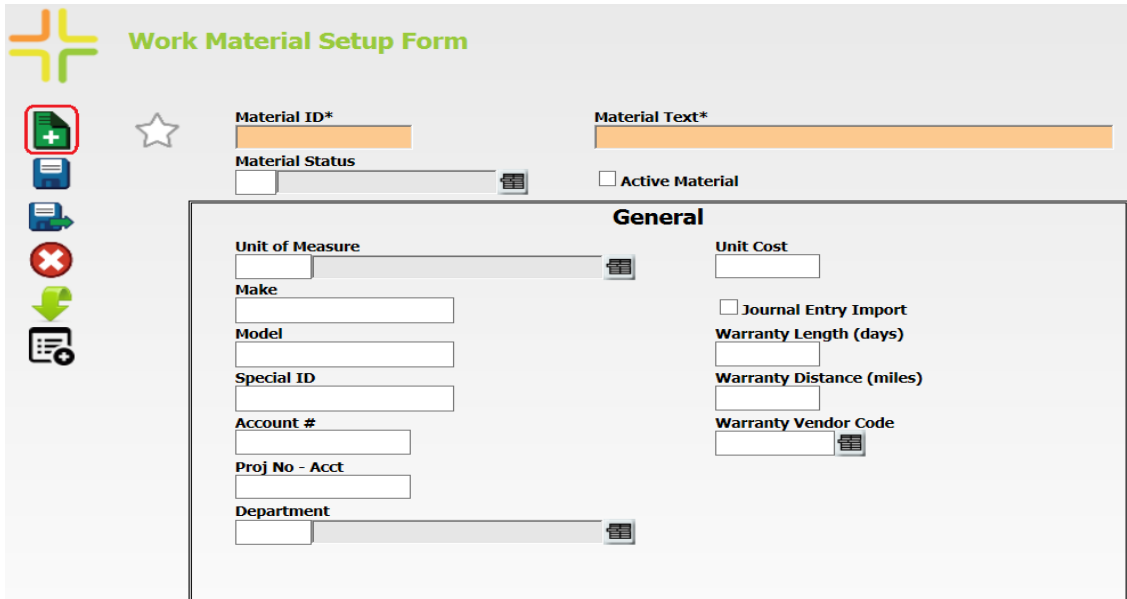


2. Opens up this screen.



| | Material ID | Material Text | Material Status Text | Active Material | Unit of Measure | Unit of Measure Text | Make | Model | Special ID |
|---|-------------|---------------------------------|----------------------|-------------------------------------|-----------------|----------------------|------|-------|------------|
|  | Water | Water | | <input checked="" type="checkbox"/> | Gal | Gallons | | | |
|  | 0_00_000 | Other/Misc/Non-Inventoried Part | | <input checked="" type="checkbox"/> | | | | | |
|  | 0_SN_029 | Sign Deer Crossing | In Stock | <input checked="" type="checkbox"/> | 2 | Each | | | |
|  | 0_SD_001 | Seed Grass | In Stock | <input checked="" type="checkbox"/> | Bag | bag | | | |
|  | 0_SP_010 | Trash Bag | In Stock | <input checked="" type="checkbox"/> | 2 | Each | | | |
|  | 0_SP_002 | Cleaning Supplies | In Stock | <input checked="" type="checkbox"/> | 2 | Each | | | |

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

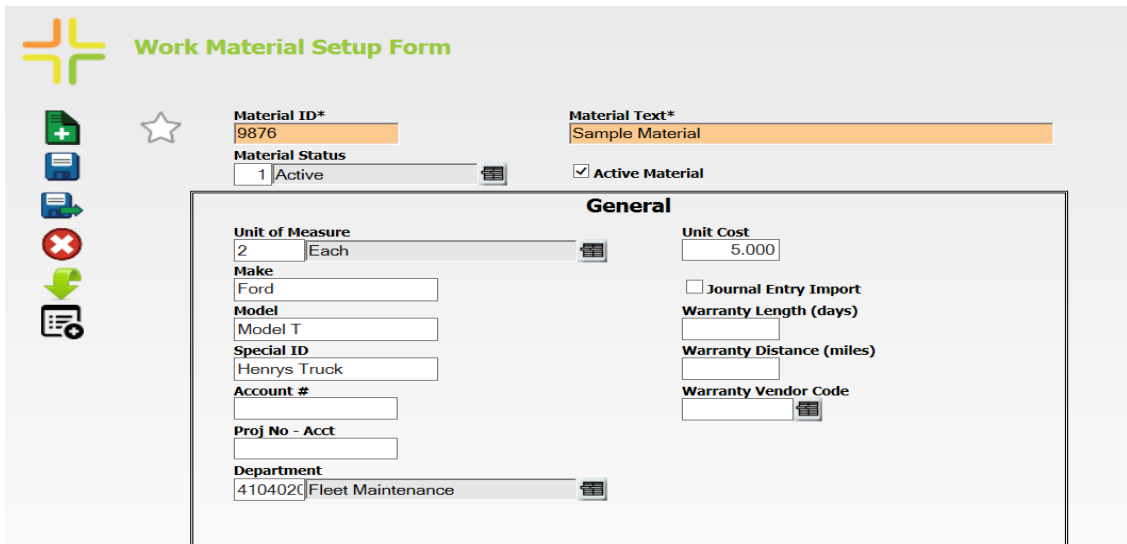


The screenshot shows the 'Work Material Setup Form' with a toolbar on the left containing icons for Add, Save, Cancel, and other functions. The form fields are as follows:

- Material ID***: Empty text box
- Material Text***: Empty text box
- Material Status**: Dropdown menu
- Active Material**: ☐
- General** section:
 - Unit of Measure**: Dropdown menu
 - Unit Cost**: Text box
 - Make**: Text box
 - Journal Entry Import**: ☐
 - Model**: Text box
 - Warranty Length (days)**: Text box
 - Special ID**: Text box
 - Warranty Distance (miles)**: Text box
 - Account #**: Text box
 - Warranty Vendor Code**: Text box
 - Proj No - Acct**: Text box
 - Department**: Dropdown menu

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

*Note: If marked; ☒ **Active Material** 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 'Work Material Setup Form' with the following data entered:

- Material ID***: 9876
- Material Text***: Sample Material
- Material Status**: 1 Active
- Active Material**: ☒
- General** section:
 - Unit of Measure**: 2 Each
 - Unit Cost**: 5.000
 - Make**: Ford
 - Journal Entry Import**: ☐
 - Model**: Model T
 - Warranty Length (days)**:
 - Special ID**: Henrys Truck
 - Warranty Distance (miles)**:
 - Account #**:
 - Warranty Vendor Code**:
 - Proj No - Acct**:
 - Department**: 4104020 Fleet Maintenance

- Click save and close. 

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

Work Material Setup

Material Setup

| | Material ID | Material Text | Material Status Text | Active Material | Unit of Measure | Unit of Measure |
|--|-------------|----------------------|----------------------|-------------------------------------|-----------------|-----------------|
| | 9876 | Sample Material | Active | <input checked="" type="checkbox"/> | 2 | Each |
| | 9832 | POWER STEERING FLUID | | <input checked="" type="checkbox"/> | qrt | Quart |

7. Click on Categories and Add record to assign Categories

9876 Sample Material

Categories (0)

Categories

No records to display.

8. Add the categories

Work Material Setup Categories Form

Category*

| Category | Description | Rec # |
|----------|-------------------|-------|
| 70000 | Fleet Maintenance | 167 |

Cancel Select

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.

| Category | Category Text |
|----------|-------------------|
| 70000 | Fleet Maintenance |


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

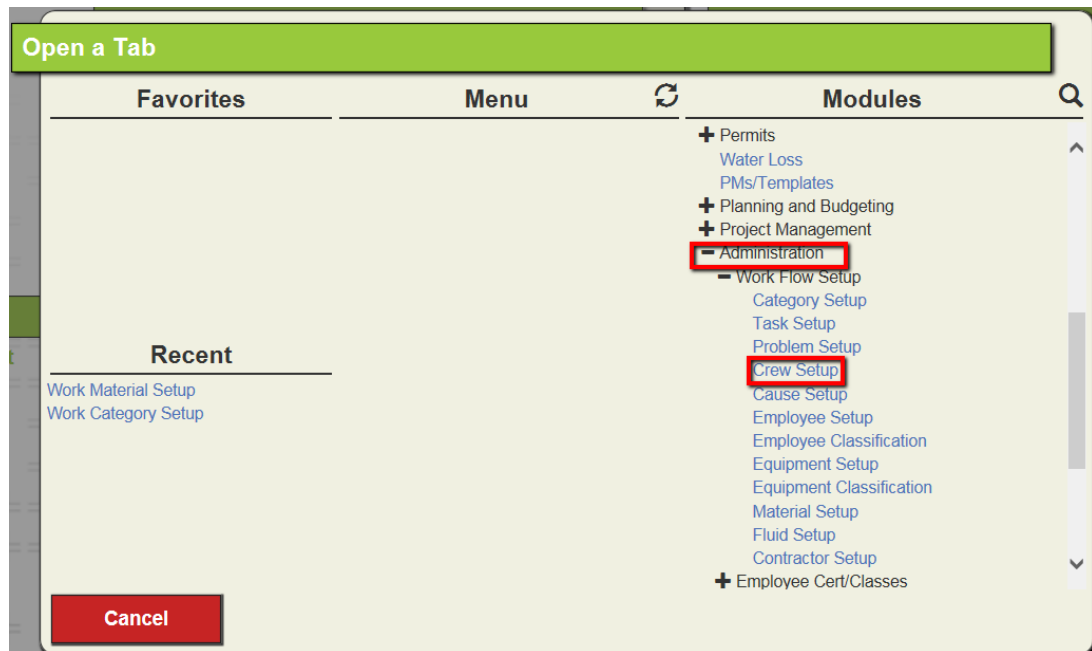
| Work Order # | Category Text | Main Task Text |
|--------------|-------------------|----------------------------|
| 2007-01707 | Fleet Maintenance | TIRES, TUBES, LINERS, VALV |
| 2007-01703 | Fleet Maintenance | TIRES, TUBES, LINERS, VALV |
| 2007-01696 | Fleet Maintenance | TIRES, TUBES, LINERS, VALV |
| 2007-01669 | Fleet Maintenance | TIRES, TUBES, LINERS, VALV |

Notes: _____

Crews

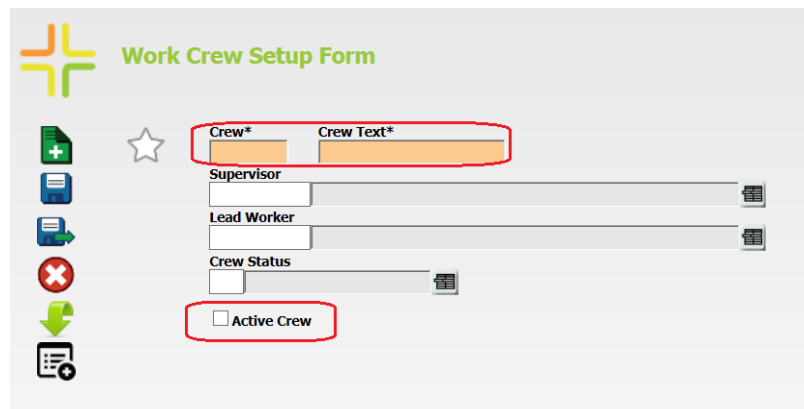
The next *Work Flow Setup* module we'll discuss is the *Crew* module. Crews are another type of work resource. This module allows you to select a group of employees and include them as resources in a crew. In addition, you'll also be able to associate resources from the *Equipment*, *Materials*, and *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. Select the Open Tab icon  >>Work>>Administration>>Work Flow Setup>> Crew Setup from the Web application Open a Tab screen.







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





Note: If ☐ **Active Crew** 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.




- Select the Supervisor and Lead Worker from the list if you want those fields to auto-populate on work orders using this Crew.
- Save the Crew by clicking on the save and close button 
- Locate the newly created crew on the grid and click on the expand button to assign categories it can be used in.

| | | | | | | | |
|--|---|------|------------------|-----|--------------|-----|-----------------|
|  |  | WWSW | Sewer Maint Crew | 109 | BORIS ARANOV | 104 | ALLEN LANKASTER |
|  |  | WWSW | Sewer Maint Crew | 109 | BORIS ARANOV | 104 | ALLEN LANKASTER |
| <div> <div>Categories (0)</div> <div>Employee (0)</div> <div>Equipment (0)</div> <div>Material (0)</div> <div>Fluid (0)</div> <div>Contractor (0)</div> </div> | | | | | | | |



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

| | | | | | | | |
|---|---|------|------------------|-----|--------------|-----|-----------------|
|  |  | WWSW | Sewer Maint Crew | 109 | BORIS ARANOV | 104 | ALLEN LANKASTER |
| <div> <div>Categories (0)</div> <div>Employee (0)</div> <div>Equipment (0)</div> <div>Material (0)</div> <div>Fluid (0)</div> <div>Contractor (0)</div> </div> | | | | | | | |
| <div>   Categories </div> | | | | | | | |
| No records to display. | | | | | | | |


- Open the Category list



Work Crew Setup Categories Form


Category*




- Select Category

| Category | Description | Rec # |
|----------|---------------------|-------|
| 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 |

Cancel
Select

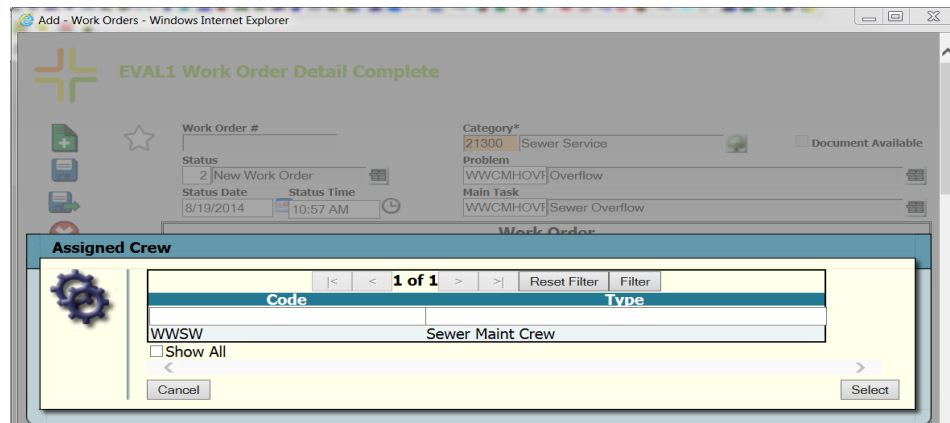
10. Save and Close 

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









| | Crew | Crew Text | Supervisor | Supervisor Text | Lead Worker | Lead Worker Text |
|---|-----------------------|---------------------|----------------------|---------------------|------------------|-----------------------|
|  | WWSW | Sewer Maint Crew | 109 | BORIS ARANOV | 104 | ALLEN LANKASTER |
| | Categories (1) | Employee (0) | Equipment (0) | Material (0) | Fluid (0) | Contractor (0) |

12. Adding Employees, Equipment, Material, Fluids and Contractors is accomplished the same way.

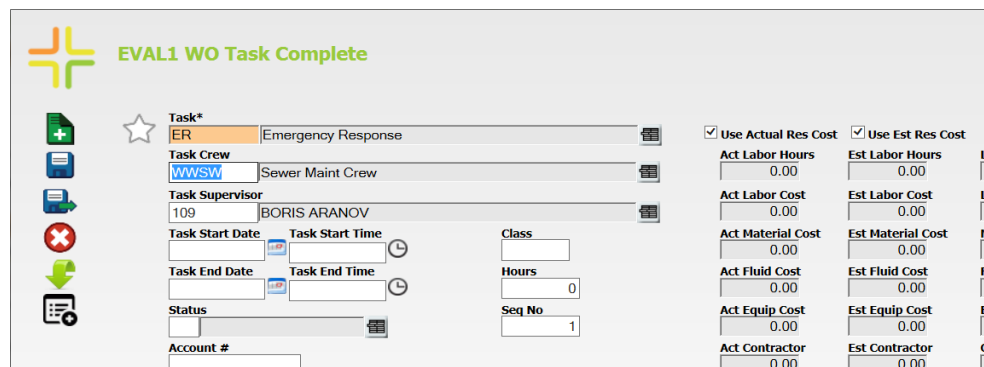
13. After you've saved your Crew record, you'll be able to select this crew in the *Work Order Form* when creating a new work order for that category



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

|  | WWSW | Sewer Maint Crew | 109 | BORIS ARANOV | 104 | ALLEN LANKASTER |
|---|---|---|---|---|------------------|-----------------------|
| | Categories (1) | Employee (1) | Equipment (1) | Material (2) | Fluid (0) | Contractor (0) |
|  |  |  |  |  | | |
| | Resource | Resource Text | | | | |
|  | G790671 | ROD | | | | |
|  | G43044000 | SNAP RINGS | | | | |

15. Then using that crew on a Work Order task



16. 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.

Work Orders

Work Or

| Work Order # | Category Text | Main Task Text | Problem Text | Reason Text | Lead Worker Text | Assigned Crew |
|--------------|---------------|--------------------------|--------------|-------------|------------------|-----------------|
| 2014-00088 | Sewer Service | Odor Control Maintenance | Odor Control | | ALLEN LANKASTER | Sewer Maint Cre |

Locations (1) Assets (1) Checklist (0) Work Order Events (0) **Tasks (1)** Work Order Tracking (5) Comments (0)

Tasks

| Seq No | Task | Task Text | Start Date | End Date | UOM | # of Units | Total Cost | Calc'd Unit Cost | Actual Labor |
|--------|------|--------------------|------------|----------|------|------------|------------|------------------|--------------|
| 1 | ER | Emergency Response | | | Each | 0.00 | 0.00 | 0.00 | |

Employees (1) Equipment (1) Materials (2) Fluids (0) Contractors (0)

Materials


| Material | Material Text | Alt Description | Start Date | End Date | UOM | Units | Unit Cost | Total Cost | Re: |
|-----------|---------------|-----------------|------------|----------|------|-------|-----------|------------|-----|
| G790671 | ROD | | | | Each | 0 | 0.000 | 0.00 | |
| G43044000 | SNAP RINGS | | | | Each | 0 | 0.000 | 0.00 | |

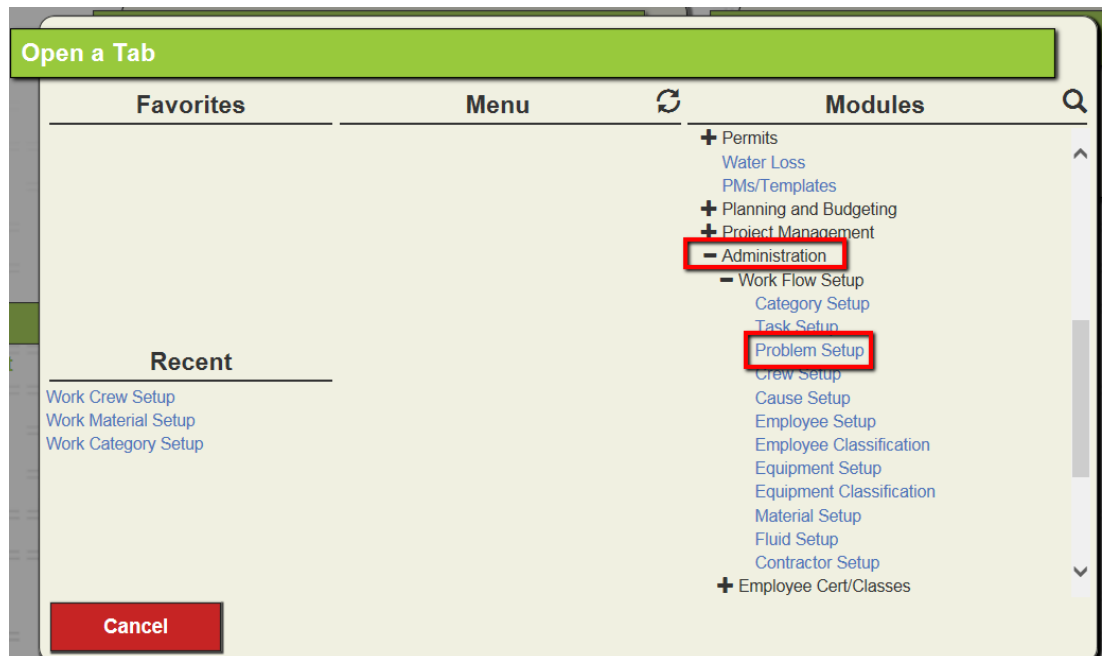
Notes: _____


Problems

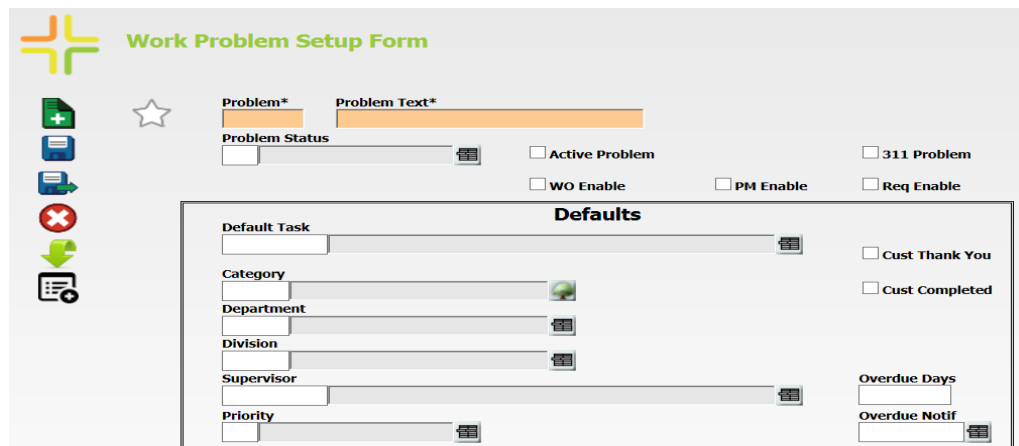
In this next *Work Flow Setup* step, we'll discuss how to create records for problems that result in work orders. All of the records that you enter into the *Problems* module will be added to the pick list used throughout the *Work* module. When you select a problem from the list in *Work Orders*, the 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. Select the Open Tab icon  >>Work>>Administration>>Work Flow Setup>>Problem Setup from the Web application Open a Tab screen.



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.

Work Problem Setup Form

Problem* Problem Text*

ovflw Sewer Over Flow

Problem Status

☒ Active Problem ☐ 311 Problem

☒ WO Enable ☐ PM Enable ☒ Req Enable

Default Task Defaults

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

Defaults

Default Task

Category

Department

Division

Supervisor




Priority

☐ Cust Thank You


☐ Cust Completed



Overdue Days

Overdue Notif



- b. Notifications for Problems are driven by the use of  and will be
 - c. Citizen response emails are used if  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.

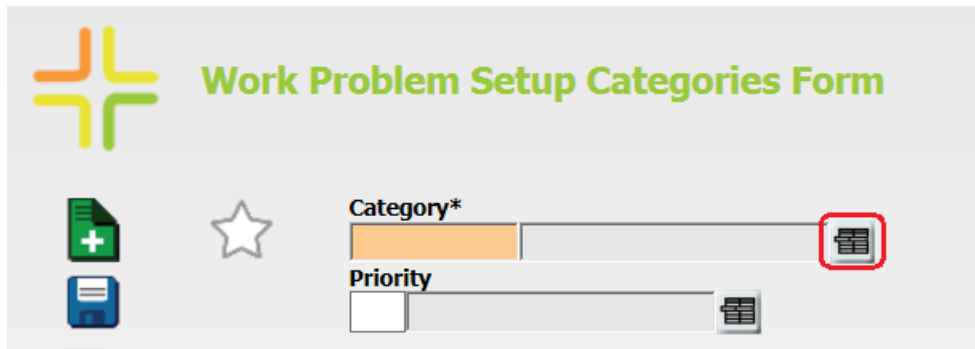


| | Problem | Problem Text | Problem Status Text | Active Problem | 311 Probl |
|---|---------|-----------------|---------------------|-------------------------------------|--------------------------|
|  | ovflw | Sewer Over Flow | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|  | test | test problem | | <input checked="" type="checkbox"/> | <input type="checkbox"/> |


8. Click on Categories and Add Record


| | Problem | Problem Text | Problem Status Text | Active Problem |
|---|---------|-----------------|---------------------|-------------------------------------|
|  | ovflw | Sewer Over Flow | | <input checked="" type="checkbox"/> |
| <div> <div>Scripts (0)</div> <div>Notifications (0)</div> <div>Categories (0)</div> <div>Zone Supervisors (0)</div> </div> <div>  Categories <div>No records to display.</div> </div> | | | | |

9. Open the Category list.




Work Problem Setup Categories Form


Category* 

Priority 

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








| 1 of 1 | | | Reset Filter | Filter |
|----------|----------------------|-------|--------------|--------|
| Category | Description | Rec # | | |
| 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 | | |


Cancel 

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.


| | Problem | Problem Text | Problem Status Text | Active Problem |
|---|---|---|---|---|
|  | ovflw | Sewer Over Flow | | <input checked="" type="checkbox"/> |
| | Scripts (1) | Notifications (0) | Categories (0) | Zone Supervisors (0) |
| |  |  |  |  |

14. Select add a record .

15. Enter your Script.

**Work Problem Setup Scripts Form**









Sequence*

1

Question*

First Question.....


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

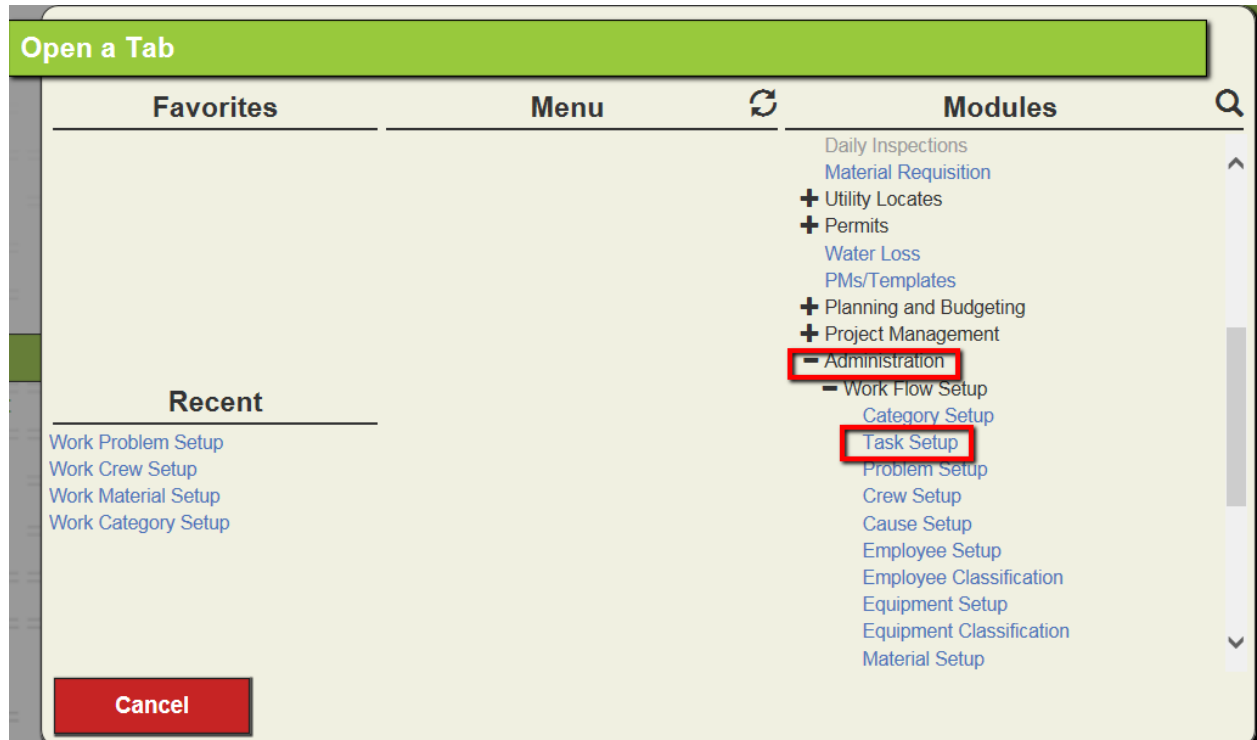
These scripts will be automatically carried over to the work order when this problem is selected.


Notes: _____

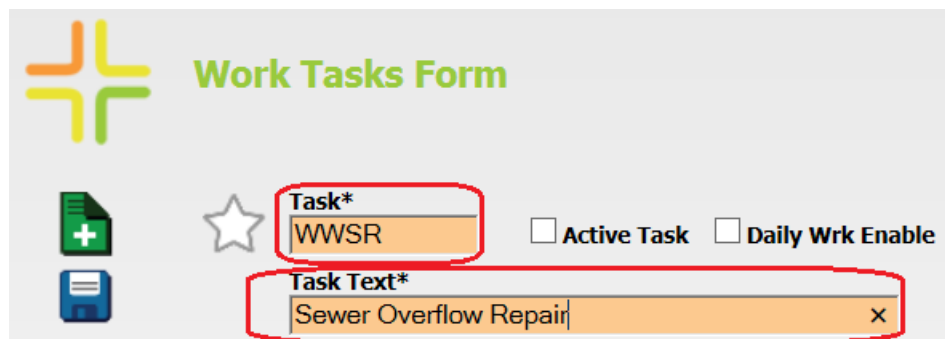
Work Tasks

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 the Open Tab icon  >>Work>>Administration>>Work Flow Setup>> 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 ☐ **Active Task** 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.

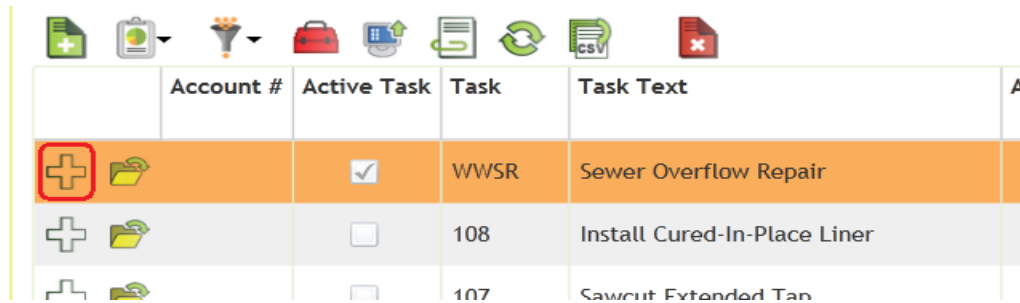
| | | |
|------------------------------------|--------------------------------------|-----------------------------------|
| Priority <input type="text"/> | | Account # <input type="text"/> |
| Crew <input type="text"/> | Classification <input type="text"/> | |
| Lead Worker <input type="text"/> | Department <input type="text"/> | |
| Supervisor <input type="text"/> | Division <input type="text"/> | |
| Unit Cost <input type="text"/> | Unit of Measure <input type="text"/> | Sub-Division <input type="text"/> |
| Valuation Adj <input type="text"/> | Area <input type="text"/> | |
| | | Sub-Area <input type="text"/> |







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

| | |
|---|--|
| Est. Labor Cost <input type="text"/> | Est Contractor Cost <input type="text"/> |
| Est Equipment Cost <input type="text"/> | Est. Misc. Cost <input type="text"/> |
| Est. Material Cost <input type="text"/> | Est. Fluid Cost <input type="text"/> |
| Est Task Duration <input type="text"/> | Est. Labor Hours <input type="text"/> |

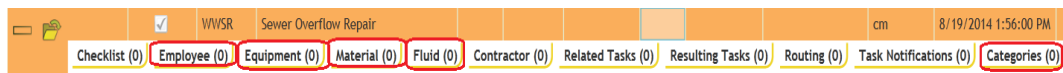
13. Click Save and Exit 

14. Expand the new task.



| | Account # | Active Task | Task | Task Text | A |
|---|-----------|-------------------------------------|------|------------------------------|---|
|   | | <input checked="" type="checkbox"/> | WWSR | Sewer Overflow Repair | A |
|   | | <input type="checkbox"/> | 108 | Install Cured-In-Place Liner | |
|   | | <input type="checkbox"/> | 107 | Sawcut Extended Tan | |

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



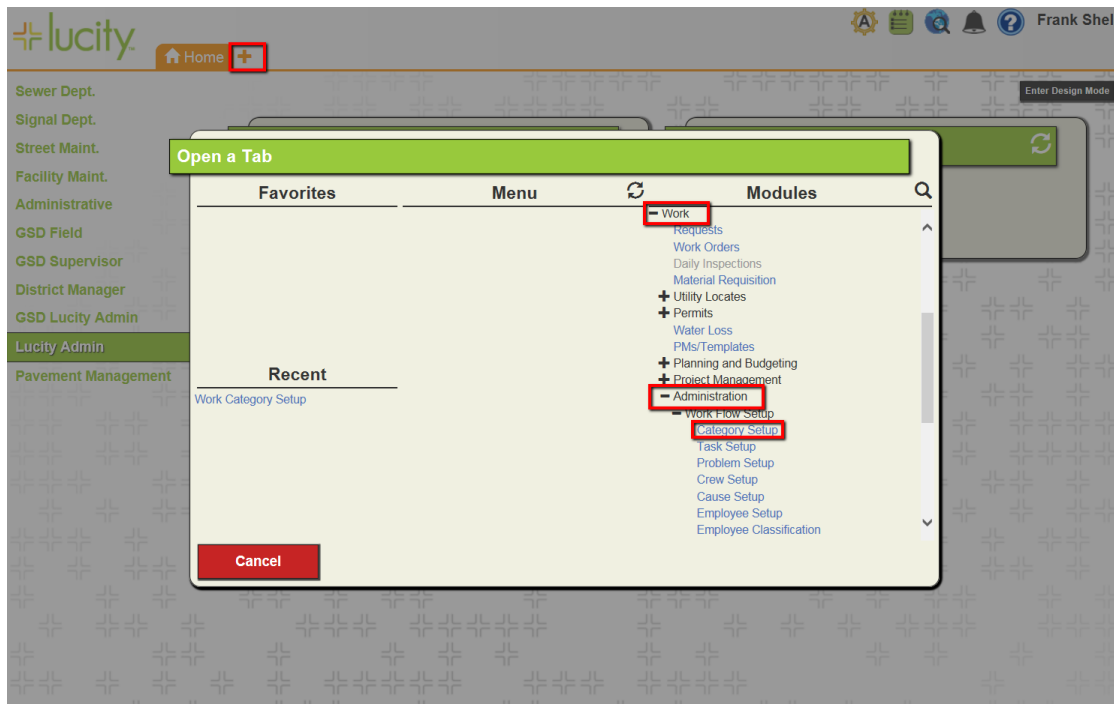
- **Resources** - Associate Employees, Materials, Fluids, Equipment with a task. Makes the resources available for use on a work order when the task is selected as the Sub Task.
- **Categories tab** - Associate a category(s) with a task. Makes the task available when a category is chosen in the *Work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

Notes: _____

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 Open Tab icon  >>Work>>Administration>>Work Flow Setup>> Category Setup



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

Category Setup

SETUP | PROBLEM | CAUSE | TASK | CREW | EMPLOYEE | EQUIPMENT | MATERIAL | FLUID

CONTRACTOR | CLASSIFICATION(EMPLOYEE) | CLASSIFICATION(EQUIPMENT)

Parent Category:

Category:

Classification:

Common Name:

UOM Type:

UOM Field :

Unit of Measure:

Account #:

Proj No - Acct:

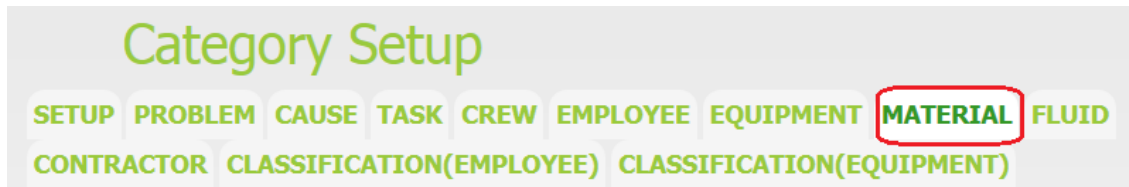
Department:


Division:

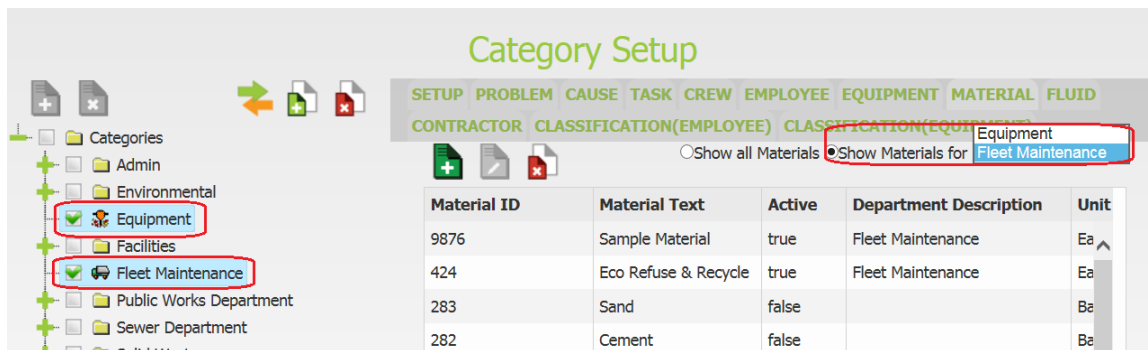
Sub-Division:



Area:

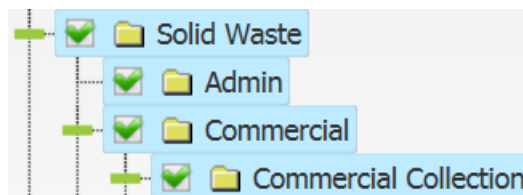
3. Select the appropriate resource tab. For example, if you want to associate a material with a category, you would select the Material tab.




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  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 Open a Tab screen>> System Configuration>>*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, Work Permit, Employee Certifications, Certification Classes, and *Project PO* module. In addition to Work notifications the following modules can also be used: Equipment, Fleet, Inventory, Sewer, Storm, and Water.

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

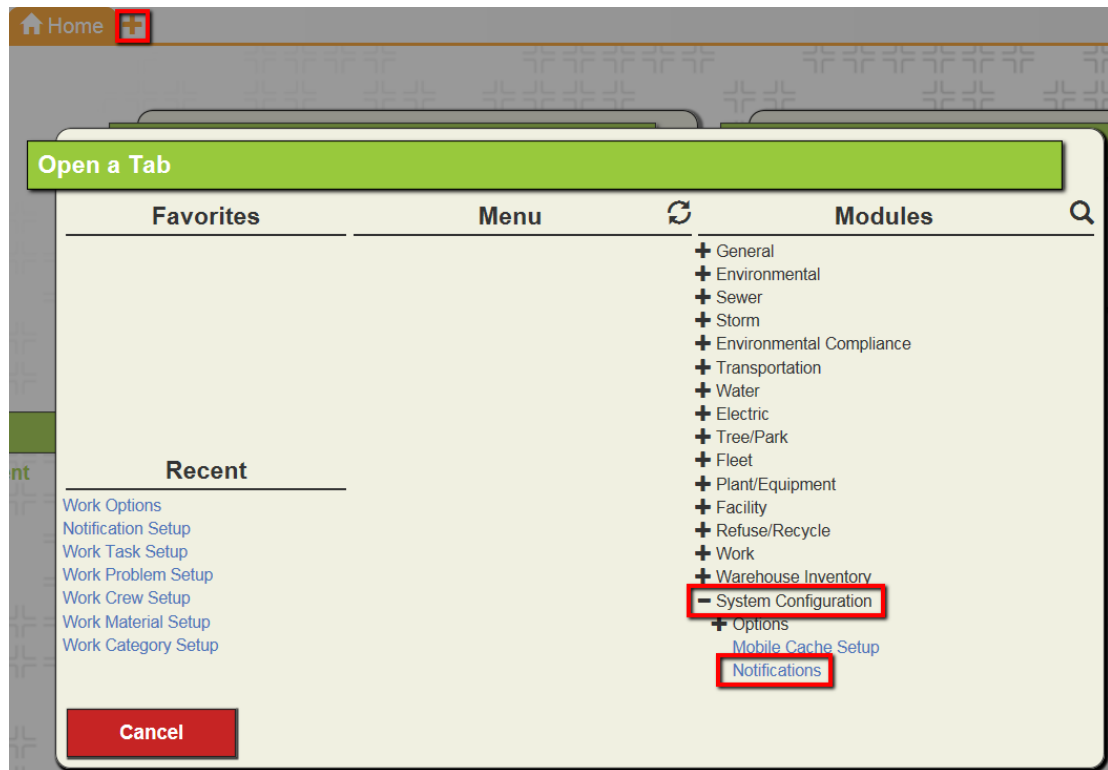
Notifications can be formatted as emails, text messages, or reports. Customer notifications and overdue task notifications are sent as emails by default. This section will cover creating a notification template, then setting up a customer notification, or either type of overdue notification. For more 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.

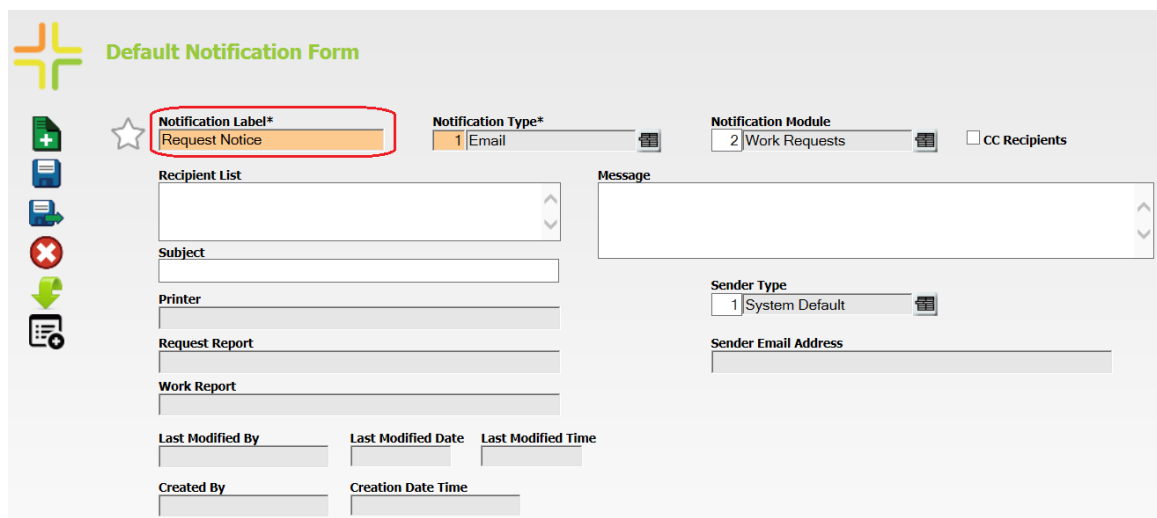
Notes: _____

Creating Email Notifications


1. Open the *Notification Setup* module by selecting the Open Tab icon  >> **System Configuration>>Notifications** from the Web application Open a Tab screen.



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


Notification Type*
1 Email 

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.

Notification Module
2 Work Requests 


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.

Recipient List
TheBigGuy@LordAllMighty.com; Bill@microsoft.com 



- 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.

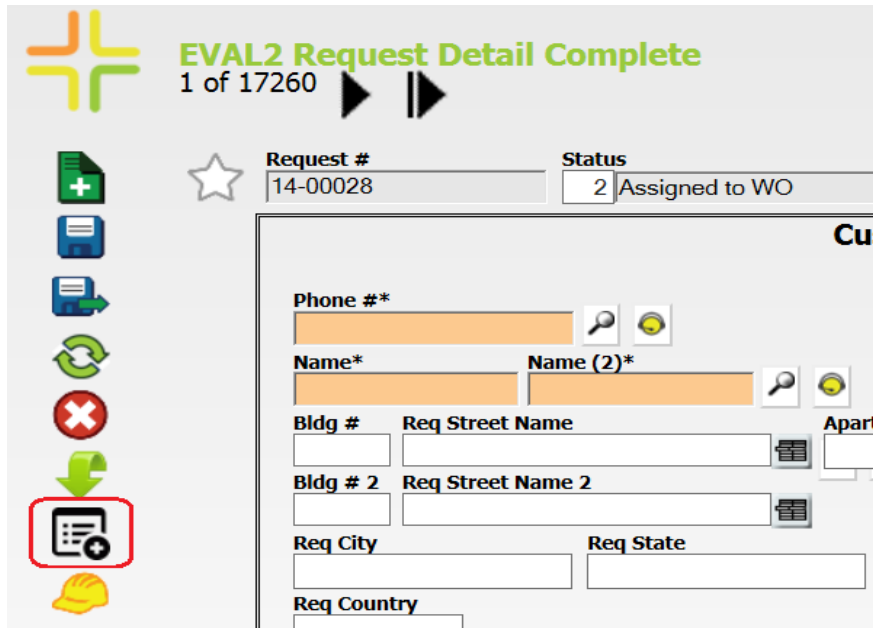
Subject
Request Notice


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

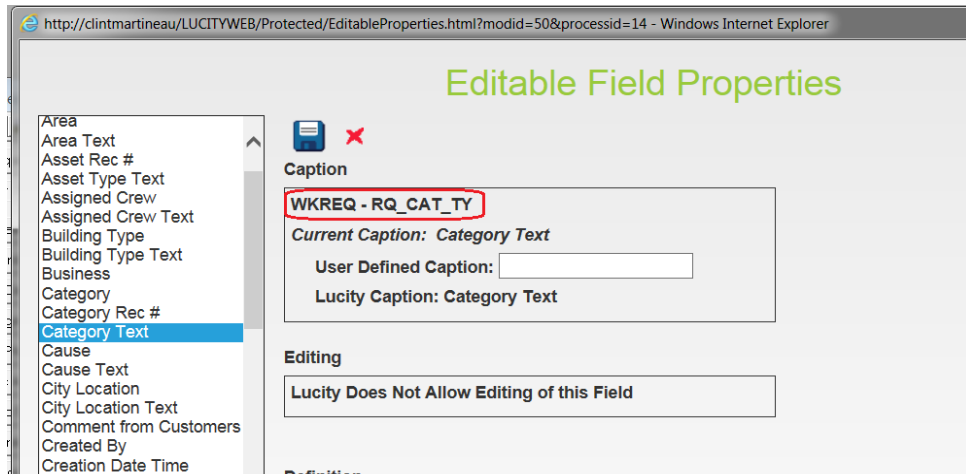
Message
You have been assigned a new Work Request 

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.

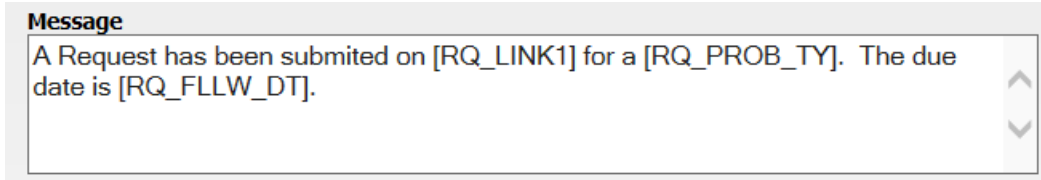
| | Request # | Status | Status Text | Status Date |
|---|-----------|--------|----------------|-------------|
|   | 14-00028 | 2 | Assigned to WO | 6/20/201 |



- 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]."

Notes: _____

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?

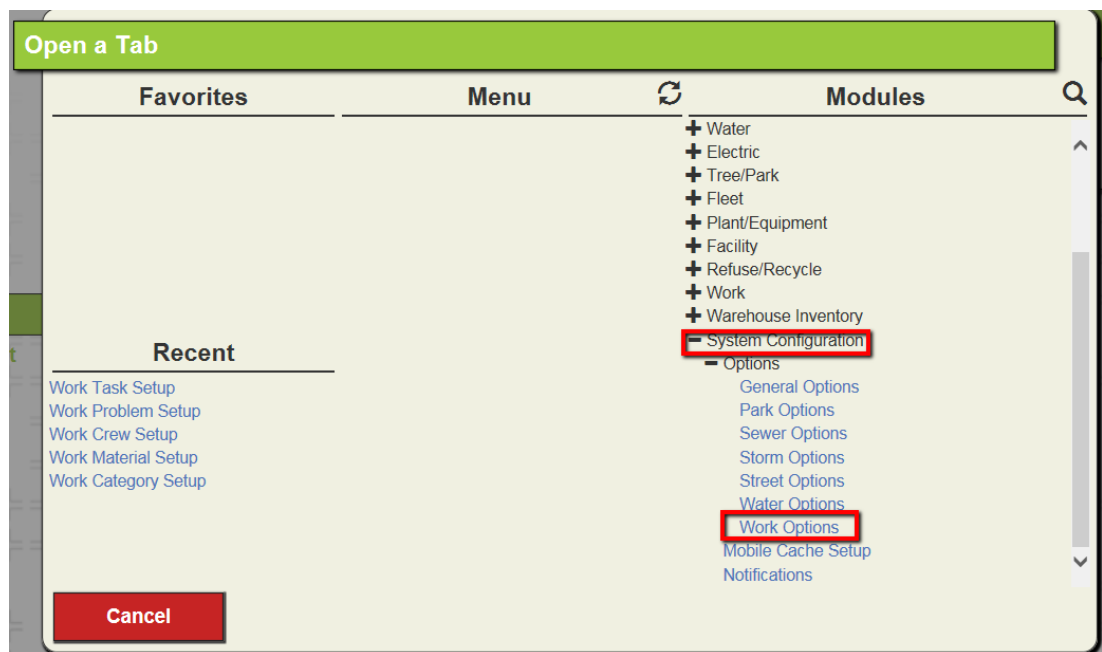
- The 'Thank You' email is sent to the original requester, as well as any requesters that were added to the record at a later date.
- When the request or associated work order status is 'Complete,' the 'Completed' email will be sent to all requesters listed.
- These notifications are also sent to anybody 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?

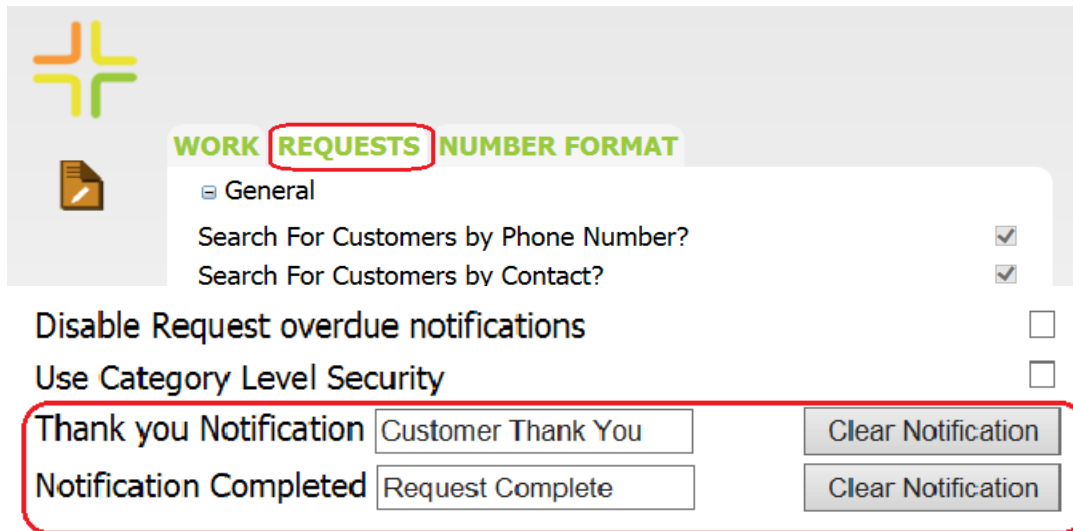
- 'Thank You' emails are sent automatically when the request is saved, as well as anytime a requester is added to the record.
- 'Completed' emails will be sent to all requesters when the request or work order status is changed to 'Complete'.

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

1. Select the Open Tab icon  >> **System Configuration>>Options>>Work Options** from the Web application Open a Tab Screen.




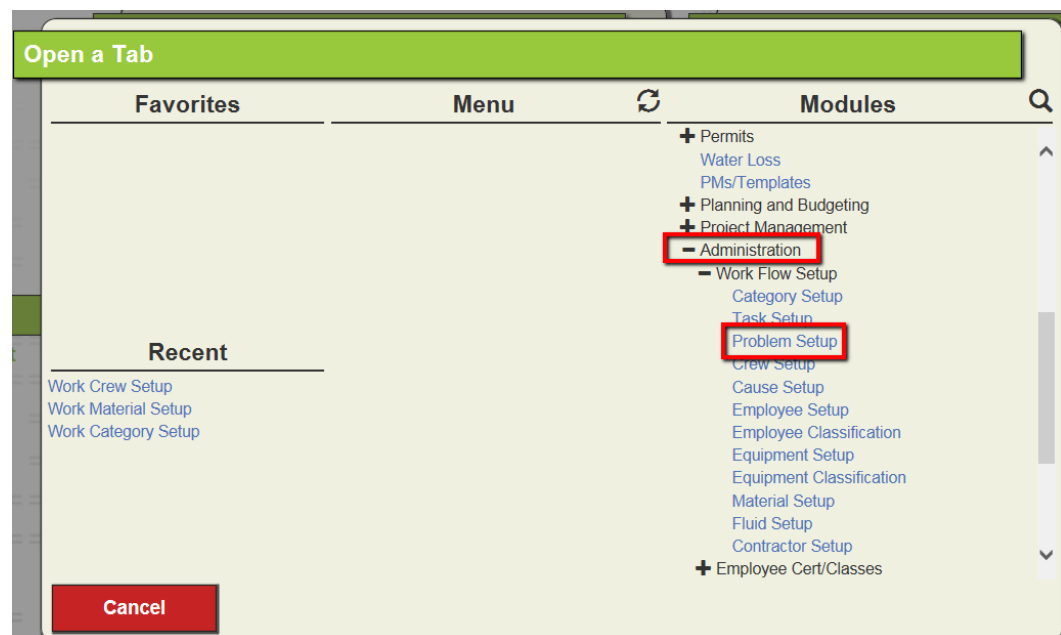
2. Select the Edit Button , Click on Requests tab and scroll to the bottom





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 select the Open Tab icon  >>Work>>Administration>>Work Flow Setup>>Problem Setup.




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

| | Problem | Problem Text | Problem Stat |
|---|---------|-----------------|--------------|
|   | ovflw | Sewer Over Flow | |

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

| Defaults | |
|--------------------------------------|--|
| Default Task <input type="text"/> | <input checked="" type="checkbox"/> Cust Thank You |
| Category <input type="text"/> | <input checked="" type="checkbox"/> Cust Completed |
| Department <input type="text"/> | |

- Save and close the record. 
- 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?

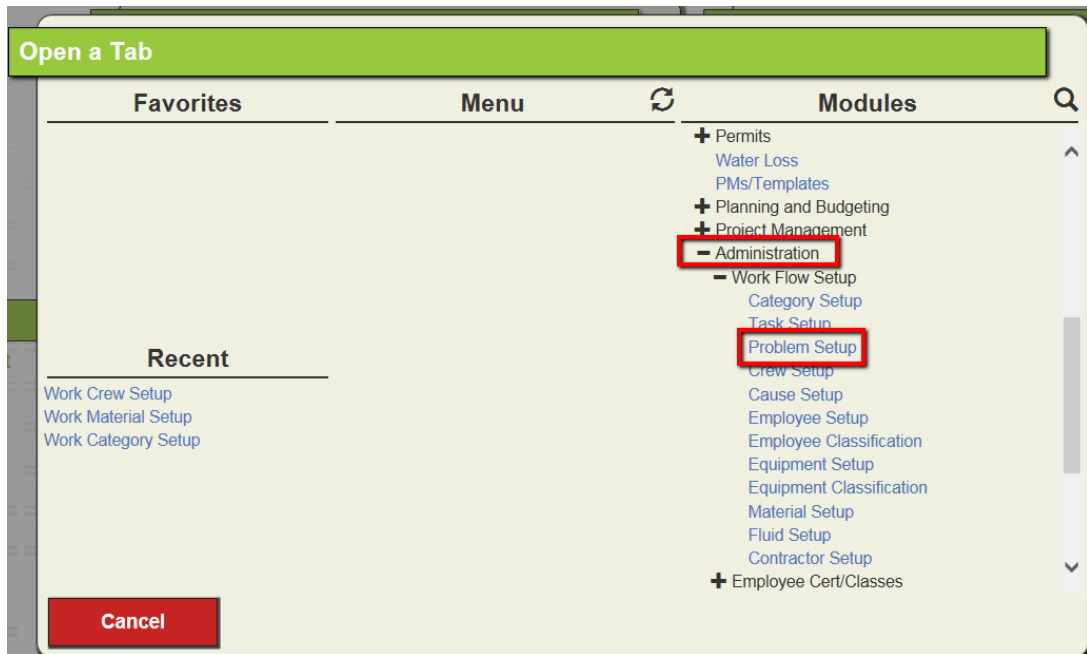
- The overdue notification is always sent to the supervisor's email, but can be sent to additional recipients based on what you set up in the *Notifications* module recipients list.

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. Select the Open Tab icon  >>Work>>Administration>>Work Flow Setup>> Problem Setup from the Web application Open a Tab screen.

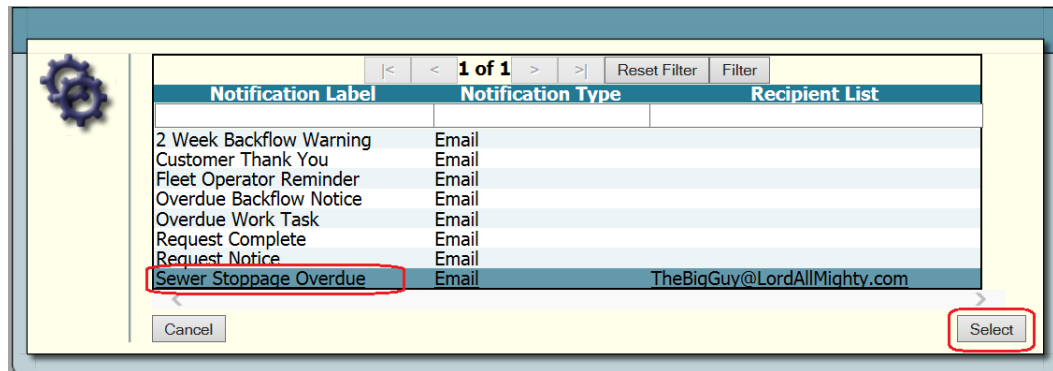


2. Find the problem for which you'd like to setup a default notification.

| | Problem | Problem Text |
|---|---|-----------------|
|  |  ovflw | Sewer Over Flow |

Then click  to open the web form.

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



| Notification Label | Notification Type | Recipient List |
|-------------------------------|-------------------|-----------------------------|
| 2 Week Backflow Warning | Email | |
| Customer Thank You | Email | |
| Fleet Operator Reminder | Email | |
| Overdue Backflow Notice | Email | |
| Overdue Work Task | Email | |
| Request Complete | Email | |
| Request Notice | Email | |
| Sewer Stoppage Overdue | Email | TheBigGuy@LordAllMighty.com |

Cancel Select

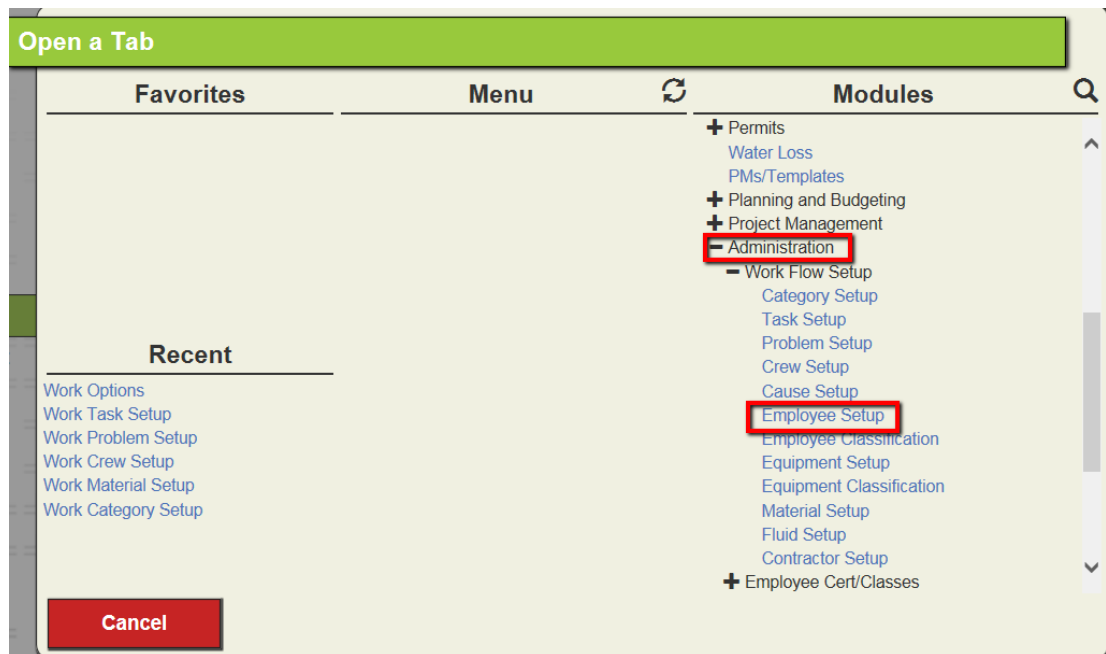
- For our example, we're using the Sewer Overflow Problem.
- After selecting the notification to be sent when a problem is overdue look at the Overdue Days

field. **Overdue Days** 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. Select the Open Tab icon  >>Work>>Administration>>Work Flow Setup>>Employee Setup.



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

| | Employee | Employee Name | Assigned Work | Er |
|---|------------|-----------------|---------------|----|
|   | cmartineau | Clint Martineau | | |


Work Employee Setup Form
 1 of 683


 Employee* cmartineau Employee Name* Clint Martineau Assigned Work
 Employee Status ☐ ☒ Active

General
 Login ID Unit Cost Overtime Rate

- a. The Employee must be an active employee

☒ Active

- b. Selected as a Supervisor

☒ Supervisor

- c. And have a valid email address

Email

cmartineau@lucity.com

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?

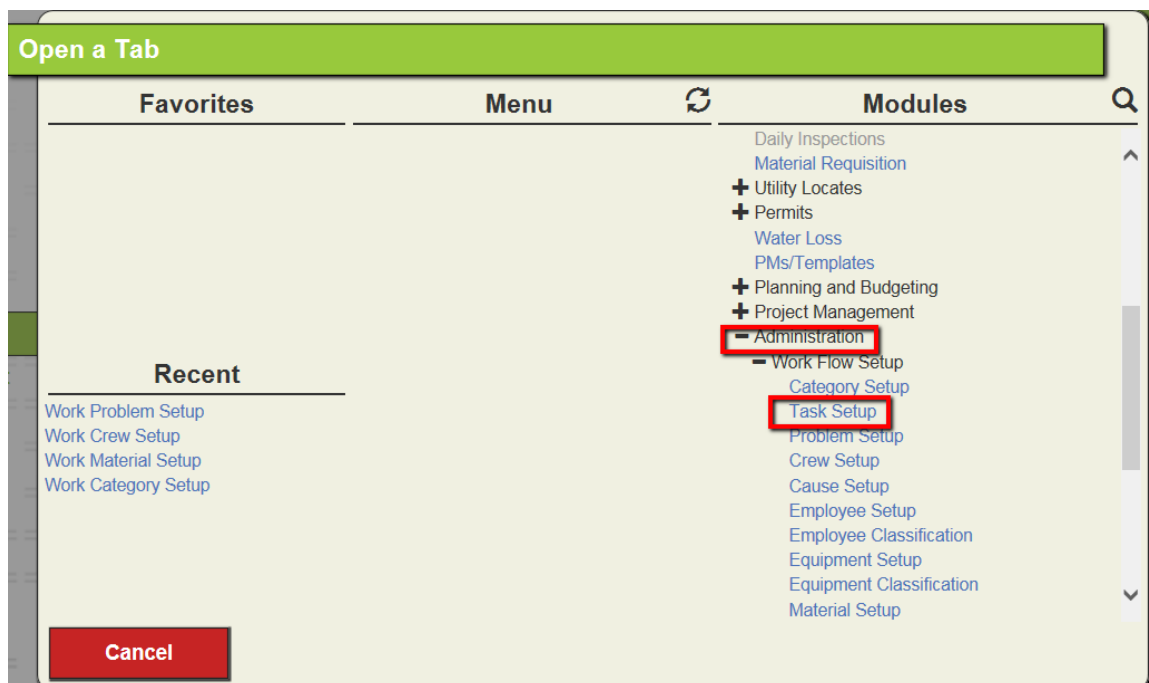
- The overdue notification is always sent to the supervisor's email, but can be sent to additional recipients based on what you set up in the *Notifications* module Recipient List.

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. Select the Open Tab icon  >>Work>>Administration>>Work Flow Setup>>Task Setup.



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

| | Account # | Active Task | Task | Task Text |
|---|-----------|-------------------------------------|------|-----------------------|
|  | | <input checked="" type="checkbox"/> | WWSR | Sewer Overflow Repair |

Click  to open web form.

Work Tasks Form
1 of 958

Task* ☒ Active Task ☐ Daily Wrk Enable ☒ Main Task ☐ PM Enable ☒ Sub Task ☐ Timesheet Enable ☒ WO Enable

Task Text* Class

Priority Account #

Crew Classification

Lead Worker Department

Supervisor Division


Unit Cost Unit of Measure Sub-Division

Valuation Adj Area

Overdue Notif Start Date Notif Sub-Area

Overdue Notif

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



1 of 1

Reset Filter Filter

| Notification Label | Notification Type |
|--------------------|-------------------|
| Overdue Work Task | Email |

Cancel Select

- 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.
- 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

Est Task Duration



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.
 - o 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.


| | Request # | Status | Status Text | St |
|---|-----------|--------|----------------|----|
|   | 14-00028 | 2 | Assigned to WO | 6 |


o


Request


Category*
01000 Admin 

Problem*
BSCON Blue Stake Inquiry - Contractor 

Cause
 

Priority
 

Follow-Up Date
 

Loc Bldg#* Loc Street Name
 

Loc Apart/Suite

LocBldg#2 Loc Street2 Name

☐ Override Supervisor

☐ Override Problem Notif

☐ Override Overdue

☐ Override Thank you

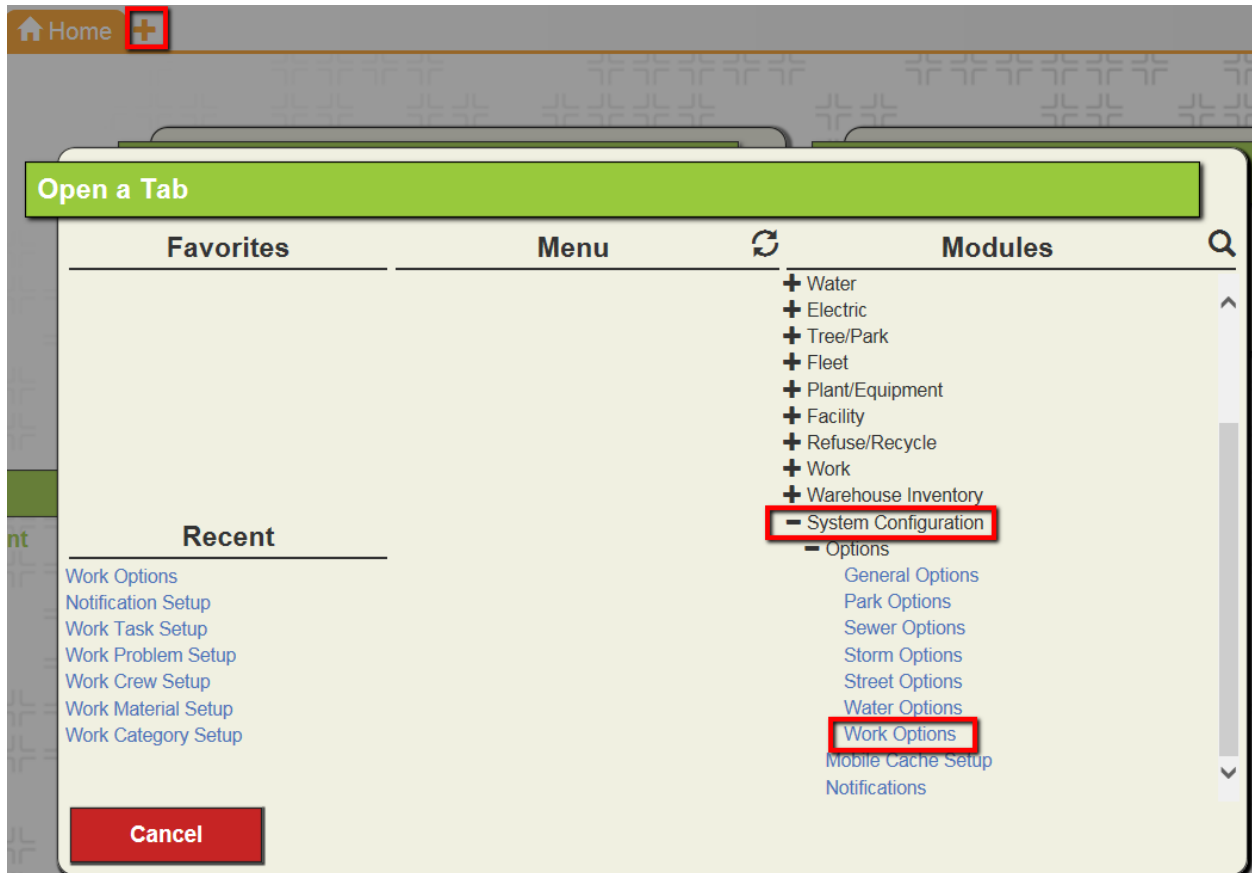
☐ Override Customer Compl

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.

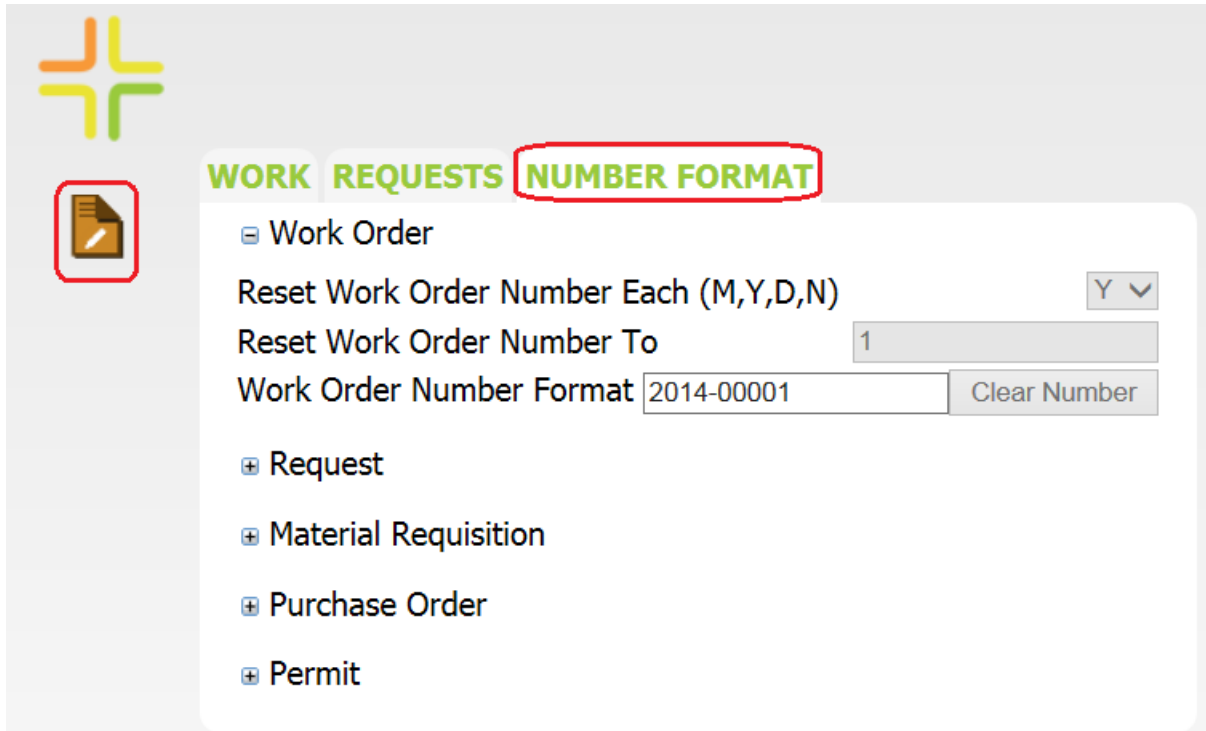
To access this module; select the Open Tab icon  >> **System Configuration** >> **Options** >> **Work Options** from the Web application Open Tab screen.




Notes: _____

Numbering Format

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



The screenshot shows a software interface with a sidebar on the left containing a logo and a document icon. The main area has three tabs: 'WORK', 'REQUESTS', and 'NUMBER FORMAT', with the last one highlighted and circled in red. Below the tabs, there are expandable sections for 'Work Order', 'Request', 'Material Requisition', 'Purchase Order', and 'Permit'. The 'Work Order' section is expanded, showing options to 'Reset Work Order Number Each (M,Y,D,N)' with a dropdown set to 'Y', 'Reset Work Order Number To' with a text box containing '1', and 'Work Order Number Format' with a text box containing '2014-00001' and a 'Clear Number' button.

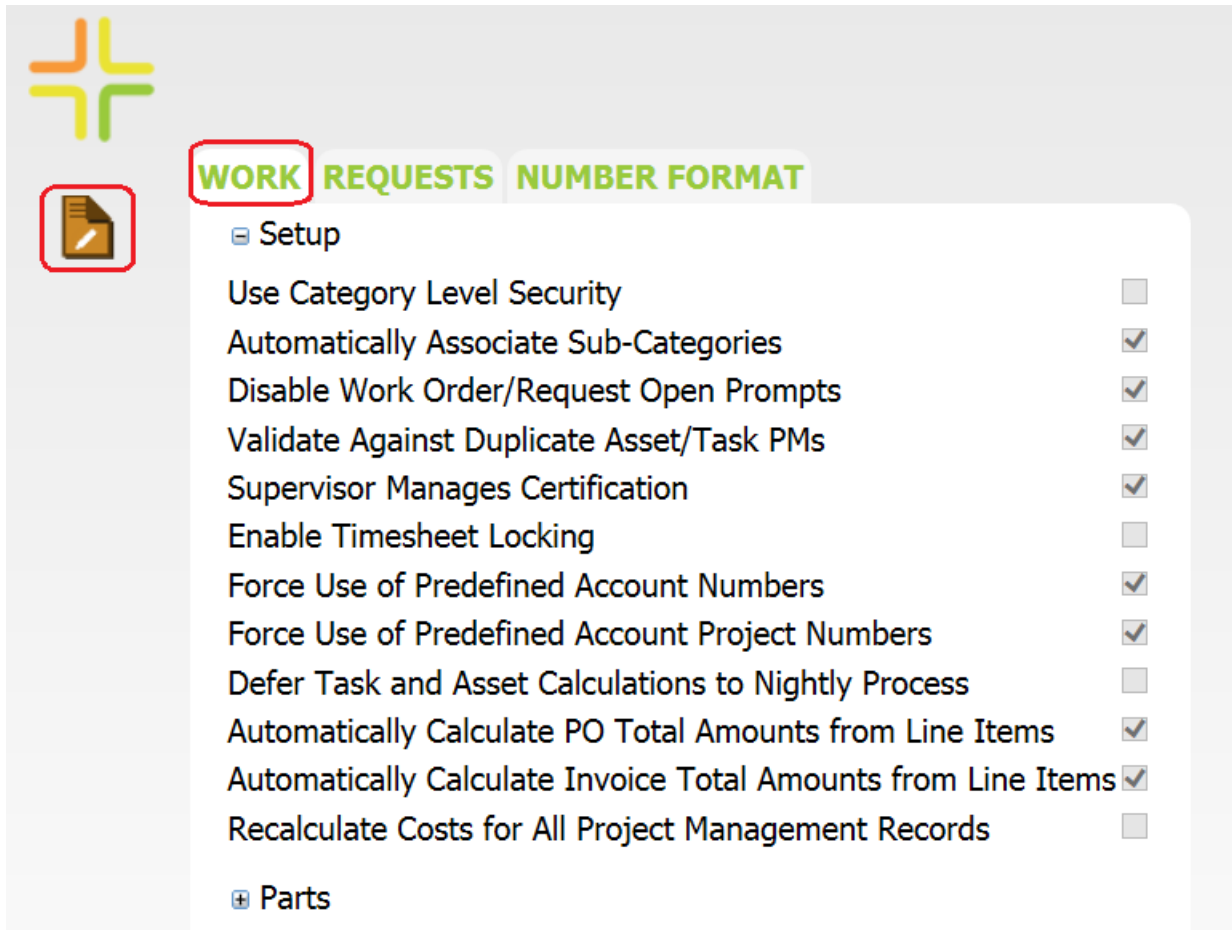
Click  to start editing the settings. Expand or collapse each line to make changes to the numbering format of each module.



Notes: _____

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*.

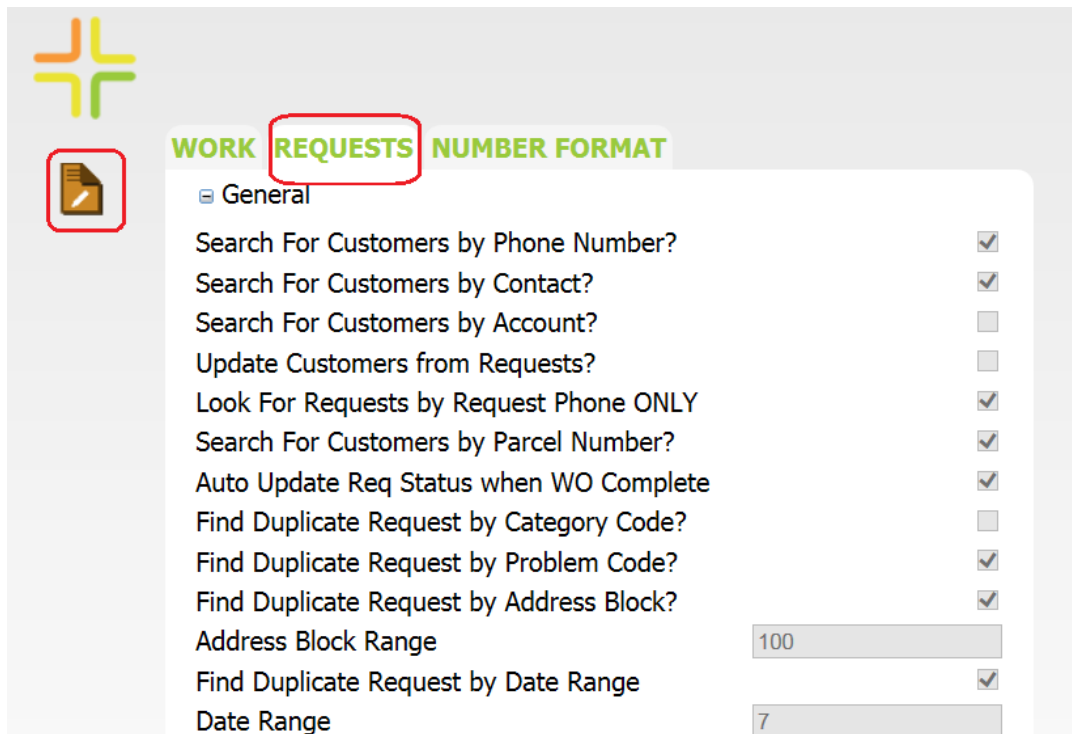


2. Expand or collapse each line to make changes to each module.
 - Check or Uncheck in the field provided to turn on or off 'Yes' or 'No' options.
 - Type a number (or other character) in fields where it is indicated.
 - Select the appropriate option from the pick lists where indicated.
3. Click  to 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.

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



The screenshot shows the 'REQUESTS' module toolbar with three tabs: 'WORK', 'REQUESTS' (highlighted with a red box), and 'NUMBER FORMAT'. Below the tabs is a 'General' options panel. The panel contains a list of options with checkboxes and input fields. The 'Edit' button (a document icon with a pencil) is highlighted with a red box.


| Option | Status |
|--|-------------------------------------|
| Search For Customers by Phone Number? | <input checked="" type="checkbox"/> |
| Search For Customers by Contact? | <input checked="" type="checkbox"/> |
| Search For Customers by Account? | <input type="checkbox"/> |
| Update Customers from Requests? | <input type="checkbox"/> |
| Look For Requests by Request Phone ONLY | <input checked="" type="checkbox"/> |
| Search For Customers by Parcel Number? | <input checked="" type="checkbox"/> |
| Auto Update Req Status when WO Complete | <input checked="" type="checkbox"/> |
| Find Duplicate Request by Category Code? | <input type="checkbox"/> |
| Find Duplicate Request by Problem Code? | <input checked="" type="checkbox"/> |
| Find Duplicate Request by Address Block? | <input checked="" type="checkbox"/> |
| Address Block Range | <input type="text" value="100"/> |
| Find Duplicate Request by Date Range | <input checked="" type="checkbox"/> |
| Date Range | <input type="text" value="7"/> |

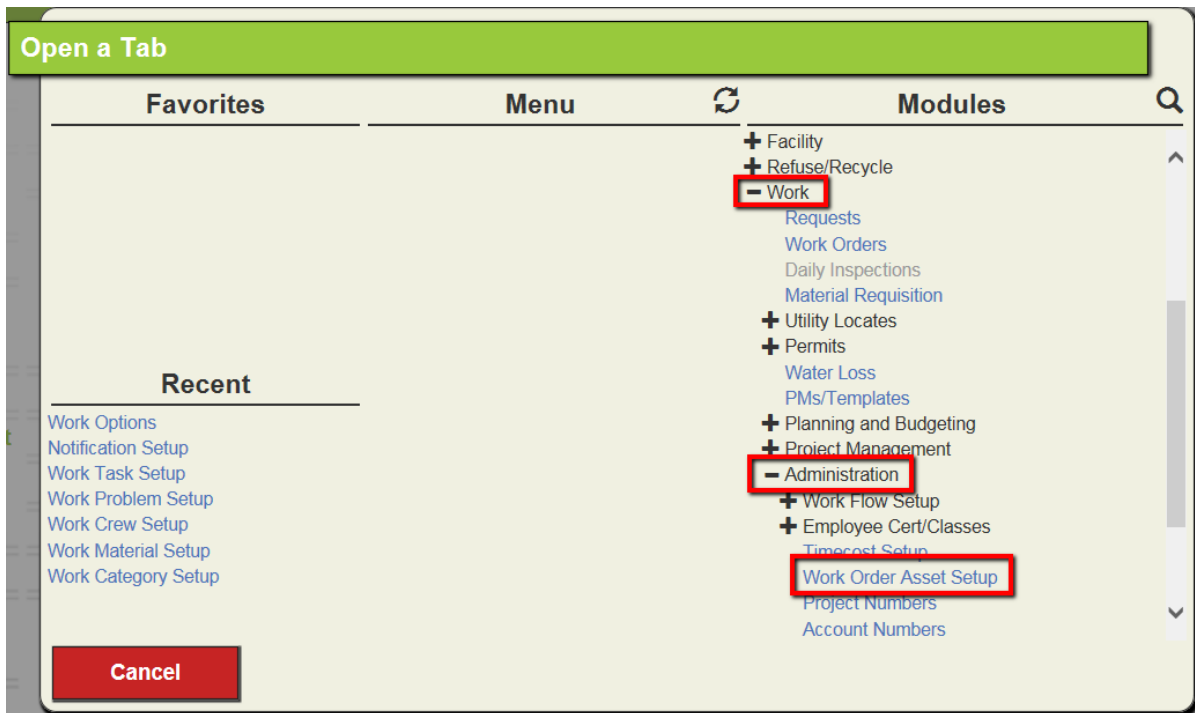
2. Expand or collapse each line to make changes to each module.
 - Check or Uncheck in the field provided to turn on or off 'Yes' or 'No' options.
 - Type a number (or other character) in fields where it is indicated.
 - Select the appropriate option from the pick lists where indicated.
3. Click  to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

Notes: _____

Work Asset Setup


The *Work Asset Setup* module allows you to customize the Asset Attribute information that is brought over to the *Work Order Asset Grid*. Currently this is not editable in the Web, it is view only within the Web application and all changes to the setup must be completed in Lucity Desktop **Work Module>>Administration>>Work Asset Setup**.

1. To access this module within the web; select the Open Tab icon 
>>**Work>>Administration>>Work Order Asset Setup** from the Web application Open Tab screen.



Notes: _____

- Find the Work Asset Setup you would like to view and expand or collapse each line to view the attribute field information that will be added to the Work Order Asset Grid.

 Home Work Asset Setup +

Work Asset Setup

Work Order Asset Setup

| Asset Module | Asset Type Text | Category Text |
|--------------|------------------------|---------------|
| | Water Sampling Station | |

Fields (54)

Fields

| Field Type | Inv Field1 | Inv Field2 | Link to WKASINFO | WO Asset Field1 | WO Asset Field2 |
|------------|---|------------|------------------|-----------------|-----------------|
| 3 | SS_NUMBER | | 1 | AS_TEXT1 | |
| 5 | SS_MANG_CD | SS_MANG_TY | 1 | AS_USR9CD | AS_USR9TY |
| 3 | SS_LOCATE | | 1 | AS_USR41 | |
| 17 | SS_ACTIVE | | 1 | AS_USR49 | |
| 3 | [SS_ADR_BDG],SS_ADR_DIR,SS_ADR_STR,SS_ADR_TY,SS_ADR_SFX | | 1 | AS_TEXT2 | |
| 5 | | | 1 | AS_USR10CD | AS_USR10TY |
| 1 | | | 1 | AS_USR11 | |

New to 16R2

- Work Tasks - Added Department and Division Fields.
- Causes - Added a Description field.
- Work Order Tracking - can track when the Leadworker field is changed on the WO.
- Certifications/Classes - Added an *Add Multiple Employees* toolkit to the Classes > Employees grid.

Notes: _____
