



TRAINING GUIDE

Work Scheduler




Lucity Work Scheduler

This session goes over using the *Work Scheduler* inside of Lucity Web. The scheduler displays *Work Orders* in a calendar format, which lets an agency see how its workload is distributed and make adjustments, as needed. Work Scheduler is only available in the Web application at this time.

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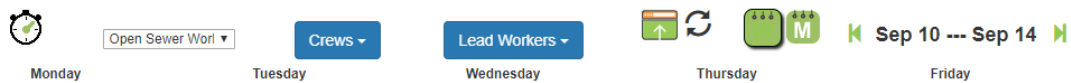
Launching Work Scheduler

To launch the features of the Timesheet system, click the  Scheduler button in the Application Toolbar. To use the *Work Scheduler*, a user must already have a *Work Order* filter saved under "My Filters." Although the Work Scheduler cannot access another user's saved filter, you can open the Work Orders module and use the [Filters](#) tool copy someone else's filter to the "My Filters" collection.

Icons and Buttons

Filters

Using filters to sort work. By creating filters users can show work for any type of groups they want. This could be by category department, work type etc. To select these filters, use the select filters drop down at the top left.



Crews


If your organization uses crews the **crews** button will allow you to drill into Work Orders assigned to crews or Work order that have not been assigned to a crew. Only crews in the current work orders displayed will show up under the Crews dropdown. Crews can be assigned to a work order in the scheduler using the Week view.

Lead Workers

If your organization uses the lead worker field [WO_EMP_CD] the Lead Workers drop down will allow you to drill into Work Orders by Lead Worker. Only Lead Workers in the current work order displayed will show up under the Lead Worker dropdown. Lead Workers can be assigned to a work order in the scheduler using the Week view.

Other Buttons

Open Work order view

 Allows the user to select a work order in the scheduler and open it by choosing a view. This opens the view in the Lucity Web Screen.

Refresh

 Refreshes the Scheduler.

Week View



In *Week* view, the *Work Scheduler* shows all *Work Orders* that fall within the current filter during the selected week. In the Week view you have the ability to edit some items on the work order. These include Main Task, Reason, Priority, Assigned Crew, Lead Worker, Category, Problem, Start Date/Time, WO Estimated Hours, Project Complete Date/Time.

Work orders with Unassigned Dates



This button which is only available in the week view allows you to see any work order that falls in the filter but that does not have a Start and End Date. In order to show the works orders these dates are required.

Month View




In *Month* view, the *Work Scheduler* shows all *Work Orders* that fall within the current filter during the selected month. In the month view you do not have the ability to directly edit any work order fields.

Year Navigation




This allows the user to change year. This replaces the Work Orders with Unassigned dates icon in the Month View.

Viewing work orders in the Scheduler.

1. Open the Work Scheduler. 
2. Select a filter. If you do not have a filter in "My Filter" an Error message will come up saying no filters available.
3. Navigate the week or month you wish to see the Filtered work orders for.

Notes:

Assigning Dates to Work Orders missing Dates for the Scheduler.

1. Click on the  to open the Work orders that do yet have a start date window.
2. Select a work order or work orders.

Workorders that do not yet have a start date.

Work Order #	Main Task Text	Category Text	Problem Text	Priority Text	Assigned Crew Text	Lead Worker Text
<input type="checkbox"/> 15-001375		Manholes	Manhole Cover Missing			
<input type="checkbox"/> 15-001357		Manholes	Manhole Cover Missing			
<input type="checkbox"/> 15-001339		Service Lateral Gravity	Sewage Backup			
<input type="checkbox"/> 15-001316		Service Lateral Gravity	Odor Complaint			
<input type="checkbox"/> 15-000356		Manholes	Overflow			

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Start Date: 8/2/18 Projected Completion: 8/2/18

3. In the start date and projected dates fill in the proper dates for those work orders.
4. Click assign in the bottom left.
5. When done click finished in the bottom right.
6. These work orders will now show up in the calendar view.

Changing basic information about a work order in the Scheduler.

1. While in the week view, select the work order from the calendar.
2. Change any of the fields in the main section.

10 Flush Line	11	12 Inspect	13	14 TV Inspection
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Work Order # 18-000010

Category: Gravity Mains

Problem: Preventative Maintenance

Main Task: TV Inspection

Reason:

Priority:

Assigned Crew: Sewer Collections 1

Lead Worker: Josef Greer

Start Date: 9/14/18 08:00 AM


WO Duration Estimate(Hrs): 112

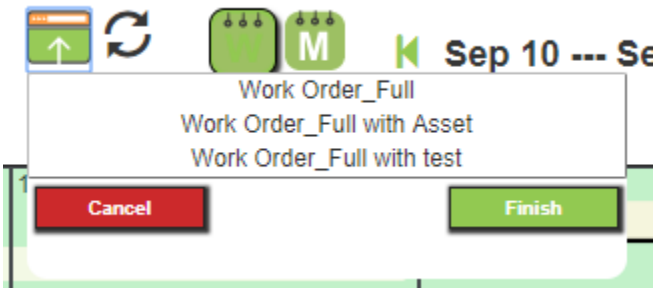
Projected Compl: 9/28/18 08:00 AM

Task	Task Text	Task Start Date	Task End Date	# of Units	Unit of Measure Text
SWCTR0	TV Inspection			0	

3. Click save.

Opening a Work Order in a Lucity View.

1. Select a work order.
2. Click the 
3. Select the view



4. Click finish.
5. In the Lucity Web page the work order will be opened in a new tab.

Notes:
