-+ Ucity.

TRAINING GUIDE

Accessing Data Yourself

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clarity through connections www.lucity.com 10561 Barkley, Suite 500 Overland Park, KS 66212 913.341.3105

Accessing Data Yourself

In this workbook, we'll show you how easy it is to retrieve data from the *Lucity* desktop and web products. We'll demonstrate how to use Filters and Queries in the desktop and the web, find records, select data, and export into various formats. We will also cover helpful tools, like loading subsets or viewing relationships. This should help new users easily find the data they are looking for as well as provide existing users with a quick refresher course.

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Desktop

Filters, Locate and Browse

Loading and Defaulting Filters

How to display all the open work orders in a department?

• When opening any module, the first display you will see before the records display is a filter screen. This is where you decide which particular records you would like to load. From here you can select existing filters or create your own.

Work Order Filter				X
ilter Sort Pg. 3	Pg. 4 Pg. 5 Pg. 6 Pg. 7 Pg. 8 Pg. 9 Pg. 1	10 Address 2r	nd 💶 🕨 Selec	ted Filter:
Author	Filter ∠	Advance	d 🔺 📗	
GBA	2006	No		
GBA	A Services	No		Make Default
GBA	All Open WOs	No		
Lucity	Andrea's Open WO's	No		Delete
GBA	COREY C OPEN WO	No		Delete
GBA	donnac test	No	=	
GBA	Emergency Response - Open Work Orders	No		Cancel
GBA	Fire Department - Hydrant Reflector	No		
GBA	FLEET COMPLETE	No		Reset
GBA	Hydrant Repair - Open Work Orders	No		
GBA	Leisure Services - Open Work Orders	No		
GBA	New Street Maintenance WOs	No		Advanced
GBA	New Water WOs	No		
GBA	Oil Change	No		
Lucity	On-Going WO's	Yes		Rename
GBA	Open Street Maintenance WOs	No		Save As
GBA	Open Water WOs	No		Save As
GBA	Park Trees	No	-	Save
•	III		• <u> </u>	/ -
Default Filter:				
D'ordan Fillon.				
				Count Records
🔲 Skip This Scree	n 🔿 Load Default Filter 🔿 Load All Records	My Filters Only		
				Go

- If you select "Go", this will load all the records in the Lucity system. Record 1 of 3281 By default, these records will load sorted by Rec #, starting with the oldest records.
- In most cases, we are not going to want to load all the records. For instance, with work orders, we don't necessarily care about work orders from last year, or canceled work orders, or work orders from other departments. Let's create a filter to load only the open work orders for a particular department.

Notes:

• The second tab of our filter screen displays a sort order for the records that we will be loading. We will want to see all of our work orders in status date order, descending from newest to oldest, and then sorted by ascending Category text. This allows us to see the newest work orders first, and also groups by category.

😽 Work Order Filter		×
Filter Sort Pg. 3 Pg. 4 Pg. 5 Pg	6 Pg. 7 Pg. 8 Pg. 9 Pg. 10 Address 2nd 📢	Selected Filter:
Sort Selectable Category	Selected	Make Default
Problem Problem Text Cause Cause Text	Category Text	Delete
Main Task Main Task		Cancel
Assigned Crew Crew	>	Reset
Supervisor Supervisor Text Lead Worker Lead Worker Text Emergency Level Prioritv Text	<	Advanced
Account # Proi No - Acct		Rename Save As
Project	•	Save
Select List Order	Sort Order	
© Standard Order	C Ascending	Add Records
C Alphabetical	© Descending	Count Records
		Go
L		

• On Pg. 3 of the work order filter screen, go to the "Status" fields. You can see that picklist fields are filterable by either there code (numeric) or text fields. Because we will be doing a range of statuses (open, on-going, etc.) it is easier to use the numeric field. Select 'Less Than' from the drop-down menu, and fill in 950 for the value.

Filter Sort	Pg. 3 Pg. 4 Pg. 5 Pg. 6 Pg. 7	Pg. 8 Pg. 9 Pg. 10
Work Order #	<none></none>	*
		~
Status	less than 📃 🚽 🥑	
Status Text	<none></none>	*

Notes:

• Look through the tabs until you find the "Department" field. The fields are displayed in the order you see them in the work order module. For department, let's search by text. Select 'equal' from the drop and then scroll through the list to find "Prks & Open Spaces". Our statement is looking for all work orders with a status of less than 950, and in the Parks & Open Spaces department. Select "Count Records" to make sure your filter returns a valid count. Also, let's go ahead and save this filter as "Open Park Work Orders" and then select "Go".

💎 Work Order Filter		×
Filter Sort Pg. 3	Pg. 4 Pg. 5 Pg. 6 Pg. 7 Pg. 8 Pg. 9 Pg. 10 Address 2nd ◀ ▶	Selected Filter:
Override Task	<none></none>	New Water WOs
Hard Lock WO	<none></none>	Make Default
Department	<none></none>	Delete
		Cancel
Department Text	Environment and Environment and Environment	Reset
Division	equal Pits & Open Spaces PUBLIC WORKS PW -Environmental	Advanced
Division	Record Count	Rename
Division Text	Total number of records: 3281	Save As
	Number of records after current filter: 20	Save
Sub-Division	ОК	Add Records Count Records
		Go

Notes:		 	

• This will give you all of your parks department's open work orders records, showing most recent date first and grouped by category.

🛀 Work Orders - Unnamed Filter Set		
◼▤◙ਫ਼੶ਲ਼੶⊡੶₽₽	<u>4 4 ▶ ▶ ∲ % % % % ∞ • ≬ • ↓ </u>	~
Work Order # 2014-00396	Category 14000 Parks and Landscape Division	
Status 2 New Work Order	Problem	
Status Date 08/14/2014 🔽 01:35 PM	Main Task	
W0 Location Assets List/Events Tasks/Res Routing Costs	Billing Related Requests/Track Links Custom 1 Custor	n 2 Comments
Asset 10 Strawberry Tree 2648 S 159TH ST Location 2648 S 159TH ST Your Town	Comment From Rec	<u>quest</u>
Cause Assigned Crew		~
Supervisor II 107 RYAN BROKE	Assigned By	Override Notifications
Lead Worker	Assigned Date 👖 🛛 / / 💌 🗄 AM	Problem
Emergency Level	Start Date 🚺 08/14/2014 💌 🗄 AM	Overdue 🗖
Account #	End Date 🚺 / / 💌 : AM	Lead Worker 🗖
Proj No - Acct		Task 🗖
Project Text	Master Project ID	Supervisor 🗖
Reason	Name	Hard Lock W0 🗖
	Record 1 of 20 View	Mode Ready

• If you want, you can set up your filter as the default filter. Use the filter button \checkmark to open up the filter screen. Find your filter in the list, and select "Make Default". Then select "Load Default Filter". This insures that whenever you open the filter screen and hit "Go", this filter will load. If you want to take it one step further, you can check the "Skip This Screen" option, so that your default filter loads every time you open the Work Order module.

1	Pg. 4 Pg. 5 Pg. 6 Pg. 7 Pg. 8 Pg. 9 Pg. 1	1 1		Park Work
Author	Filter 🛆	Advanced		
GBA	2006	No		
GBA	A Services	No	. N	4ake Defau
GBA	All Open WOs	No		
Lucity	Andrea's Open WO's	No		Delete
GBA	COREY C OPEN WO	No		Delete
GBA	donnac test	No	E	
GBA	Emergency Response - Open Work Orders	No		Cancel
GBA	Fire Department - Hydrant Reflector	No		_
GBA	FLEET COMPLETE	No		Reset
GBA	Hydrant Repair - Open Work Orders	No		
GBA	Leisure Services - Open Work Orders	No		
GBA	New Street Maintenance WOs	No		Advanced
GBA	New Water WOs	No		
GBA	Oil Change	No		
Lucity	On-Going WO's	Yes		Rename
Lucity	Open Park Work Orders	No		Save As
GBA	Upen Street Maintenance WUs	No		odiorio
GBA	Open Water WOs	No	*	Save
•		•		
Default Filter:	Ipen Park Work Orders			
				ount Record

Locate

What if we are looking for a specific work order?

• There's a few ways we can identify a specific work order. You can use the arrow

buttons to go through all records in the filter one-by-one, and jump to the end or beginning of the record set. We could also go back to the filter button and narrow our filter down to a specific work order #, or add even more fields to narrow the work order criteria. We

can also use the locate B button to see all the records in one view.

Work	Order # to Locate:	2014-00390		Open Cancel
	Work Order #	Status Text	Category Text	Main Task Te
1	2006-01616	New Work Order	Tree	Landscape
2	2006-01619	New Work Order	Tree	Landscape
3	2006-01681	New Work Order	Park	Irrigation
4	2006-01732	New Work Order	Park	Sports
5	2006-01733	New Work Order	Park	Turf Care
6	2006-01765	New Work Order	Park	Turf Care
7	2006-01766	New Work Order	Park	Landscape
8	2006-01767	New Work Order	Park	Sports
9	2006-02233	New Work Order	Park	Special Event Support
10	2006-02234	New Work Order	Park	Special Event Support
11	2006-02548	New Work Order	Park	
12	2006-02691	New Work Order	Equipment	Miscellaneous
13	2014-00381	New Work Order	Park	Bee Problem ER
14	2014-00387	New Work Order	Forestry Division	Landscape
15	2014-00389	New Work Order	Park Structure	Inventory Activities
16	2014-00390	New Work Order	Park Structure	Bee Problem ER
17	2014-00391	New Work Order	Park	
18	2014-00392	New Work Order	Park	
19	2014-00395	New Work Order	Park Court	
20	2014-00396	New Work Order	Parks and Landscape Division	
21				
22				
23				
24				

Note: In the locate view, we retain our filterset, but NOT the sort order.

• You can use the search button at the top to begin searching for matching values in any field displayed. Use the scrollbar at the bottom to view additional fields. When you find the record you want, you can either double-click or select "Open" to jump to that record in your filter set.

Browse

Now that we have this information, what can we do with it?

Now that we have a list of all of our open work orders, we want to be able to pull that out of the system. Maybe you need to get it into a spreadsheet format, or e-mail the list to a supervisor. You can use the Browse feature to create a custom, exportable view of your

supervisor. You can use the Browse **m** feature to create a custom, exportable view of your filter set, by defining the fields and order you want to see them in.

• The browse window will let you select all of the fields you need in your exported document. Add them to the window on the right. You can reorder as necessary. This allows you to only export the important information. Once you have your field list, click "Go".

🙀 Browse		-		-		x
Total Fluid Cost Est. Fluid Cost Fluid Cost Diff Actual Equip Cost Est Equipment Cost Equipment Cost Diff		Add	_	Work Order # Status Text Status Date Category Text Problem Text Main Task Text		
Contractor Cost Est. Contractor Cost Contractor Cost Diff Misc. Cost Est. Misc. Cost Misc. Cost Diff		Add Al		Supervisor Text Total Cost		
 Show Mine 	C Show.					
Browse A	Global	Author		Save	Reorde	r 📔
Supervisor/Problem	No	Lucity		Rename	Delete	
				Reset	Browse L	ast
		•	C	Go	Cancel	

• The Browse display window looks similar to our locate view. However, this view retains the filter AND sort order of your records, and displays only the fields you selected.

1 11 % % % % %			
Work Order #	Status Text	Status Date	Categor
2014-00396	New Work Order	08/14/14	Parks and Landscape Division
2014-00395	New Work Order	08/11/14	Park Court
2014-00387	New Work Order	08/08/14	Forestry Division
2014-00391	New Work Order	08/08/14	Park
2014-00392	New Work Order	08/08/14	Park
2014-00389	New Work Order	08/08/14	Park Structure
2014-00390	New Work Order	08/08/14	Park Structure
2014-00381	New Work Order	08/05/14	Park
2006-02691	New Work Order	11/27/06	Equipment
2006-02548	New Work Order	11/14/06	Park
2006-02233	New Work Order	10/24/06	Park
2006-02234	New Work Order	10/24/06	Park
2006-01765	New Work Order	08/16/06	Park
2006-01766	New Work Order	08/16/06	Park
2006-01767	New Work Order	08/16/06	Park
2006-01732	New Work Order	08/07/06	Park
2006-01733	New Work Order	08/07/06	Park
2006-01681	New Work Order	08/01/06	Park
2006-01616	New Work Order	07/10/06	Tree

• You can then use the export button to save this file as a simple, delimited text file. This file can then be opened up in a document or spreadsheet program, printed, or e-mailed.

Advanced Queries and Reports

Advanced Queries

How many work orders did Jeff Young work on in 2006?

- Sometimes the field you are trying to filter on is not available through the provided filter fields. It is possible to write advanced queries to query on child or linked tables. In this example, we will look at a child table (Work Order Resources) to determine what work orders a certain employee has been added to as a resource.
- If you go to any child table, you can use the CTRL+Right-click function to get more information on a certain field. This allows you to see what the "behind-the-scenes" name is for each field. In the work order resource table, the resource name field is "WR_RSRC_TY". You can see this module is pulling information from a table called WKRESRCE.

See Work Order Resources	×
WORK TASK 302 - LS - Clean up / Turf Vacuum Processed by Financials	1
Resource Type 1 Employee UPC Code	
Resource 642 JEFF YOUNG	
Alt Description	
Department 50020100 Prks & Open Spaces	
	Estimated
Gartier: Becource	
UDM Unit Cost Field Name: WR_RSRC_CD st 26.845 26.845 40.260	
Default Unit Lost Table Name: WKRESRCE pst 107.38 0.00 0.00 107.38	0.00
Proj No - Acct Definition Lock:	
Lucity Def Save Close Date 11/17/2006 : AM	
User 1 This code/description pick list field allows you to select	
User 2 I A Work Order Resource. The Resource selections will be limited to the type chosen in the Resource Type reentage Flat Rate Calculate On T	avt
User 3 [field above.	
User 4 Date	P.
Odometer Hour Meter Other	Meter
Starting Amount	
	Ready

- After selecting the Filter button in a module, you can switch between "Standard" and "Advanced" filter views using the button on the right. This will display a field where you can create and customize advanced queries. The windows in the bottom display available table and field names, as well as SQL keywords and operators.
- Let's start out with a Standard filter, and then add the advanced functionality to it. We know that we are looking for all work orders from the year 2006, which we can do using the standard filter tools. Use the "between" drop-down to look for a date range.

Status Date	between	-	01/01/2006	-
			12/31/2006	-

Note: Pay attention to which date fields you are using (status, start, end, etc).

• If we selected "Go" now, we would get all of the work orders in 2006. But we only want work orders where Jeff Young was a resource. Since this is not a work order field, but a work order resource field, we will have to use an advanced query. Click "Advanced".

```
Advanced SQL Report SQL
SELECT * FROM
WKORDER WHERE WKORDER.WO_STAT_DT BETWEEN #01/01/2006# AND #12/31/2006#
```

• The filter view switches to show the SQL syntax behind the standard filter. Therefore, the date field is already filled in for us. Next, we will need to use a little bit of SQL knowledge to join the two tables together and query for Jeff Young as a resource. Be sure to save the query, and count records before you hit "Go".

1	Advanced SQL Report SQL	
	SELECT * FROM	
	WKORDER WHERE WKORDER.WO_STAT_DT BETWEEN #01/01/2006# AND #12/31/2006# AND WKORDER.WO_ID IN (SELECT WKRESRCE.WR_WO_ID FROM WKRESRCE WHERE WKRESRCE.WR_RSRC_TY = 'JEFF YOUNG')	*

• We now have a filter set of 3 work order records that Jeff Young worked on in 2006.

Reports

How many total hours did Jeff Young work in 2006?

- Reports are a convenient way to view and distribute data. Lucity provides a set of pre-defined reports in each module, and you may have your own custom reports added. You can use the reports to view information on your filtered records (all open work orders), or a particular record (e.g. one assigned to you as a supervisor).
- Let's run an employee usage report on our filter set to get detailed summary of the work tasks,

hours, and costs that Jeff Young worked. Click the report 🛄 button to access your reports.

•) Dialog			
	Reports:			Depend Filler
		Crew Assignment Report	*	Report Filter
	<u></u>	Crew Assignment Report - All Addresses		C This Record Only
		Employee Hours by Equipment Summary Report	Ξ	 Current Filter
		Employee Usage Detail	-	C All Becords
	<u></u>	Employee Usage Summary Report		
	<u></u>	Equipment Hours by Employee Summary Report		
	<u></u>	Equipment Usage Detail Report		View Report
		Equipment Usage Summary Report		Print Report
	<u></u>	Fluid Usage Detail Report		
	<u>.</u>	Fluid Usage Summary Report		Export Report
	<u></u>	Main Task Detail Report		
	•••	Main Task Summary Grouped by Category	Ψ.	Add
	Report De	scription:		
	Details all	Work Order Information each employee has been		Edit
	associate	d with		Delete
			~	Properties
	Report File	Path:		
	C:\Lucity\	Reports\Work\W0emplst.rpt		Close

• We are going to select the "Employee Usage Detail" report, which is specifically designed to show us the exact information we are looking for. Run the report on the current filter, and the select "View Report".

iew	₩ 1/1	S 🞜 🖪 M	100% -	2			Busines
12							
	Employee	e Usage D	etail Rep	ort			8/22/2014
							5:24 PM
	*Unit Cost	Units	*Total Cost	Work Order	Task	End Date	
	-642 JEFF Y	OUNG					
	\$26.85	22.50	\$604.01	2006-02233	001 - AD - Trails Maintenance	11/1/2006	
	\$26.84	7.50	\$201.34	2006-02234	302 - LS - Clean up / Turf Vacuum		
	\$26.84	4.00	\$107.38	2006-02548	702 - SE - Set-up		
		34.00	\$912.73				
	_	34.00	\$912.73				
		34.00	\$312.15				

Export a Report

What can I do with this report?

• There are a variety of ways that reports can be exported. You can print the report directly, or export the information to a number of saved file types:

Format: Format: Adobe Acrobat (PDF) V	Export	 Export	
Adobe Acrobat (PDF) Cancel Canc	Format: Adobe Acrobat (PDF) Adobe Acrobat (PDF) Crystal Reports (RPT) HTML 3.2 HTML 4.0 Microsoft Excel 97-2000 (XLS) Microsoft Excel 97-2000 - Data only (XLS)	ODBC ODBC ODBC Record Style - Columns with spaces (REC) Record Style - Columns without spaces (REC) Report Definition (TXT) Rich Text Format (RTF) Separated Values (CSV) Tab Separated Text (TTX) Text (TXT)	OK Cancel

• You can also e-mail the report directly by exporting with MAPI. This opens up a Send Mail screen where you can enter the recipients, subject, and include a message.

Send Mail		x
Send	Check Names Address	Cancel
To:		
Cc:		
Subject:		
Message		
		*
		~
·		

Web

Filtering and Sorting in Views and Grids

Loading Filters

How many open work orders do we have?

• First, we will determine how many work orders we have. Click on the filter button From here you have the option to select a saved filter, view the current filter parameters, or create a new filter.

Existing	Арр	lied		
User Nam	ne	Filter Name	Is Advanced	
GBA		2006		<u>^</u>
GBA		A Services		
Lucity		Aggie Work	\checkmark	
GBA		All Open WOs		
Lucity		Andrea's Open WO's		
GBA		COREY C OPEN WO		
GBA		donnac test		
GBA		Emergency Response - Open Work Orders		
GBA		Eugene Open WOs		
GBA		Fire Department - Hydrant Reflector		
GBA		Fleet - Open Work Orders		
GBA		FLEET COMPLETE		
GBA		Hydrant Maintenance - Open WOs		
GBA		Hydrant Repair - Open Work Orders		
Lucity		Jeff Young	\checkmark	-
My Filt	ters C	Inly	# a	\$\$/

Notes:___

• Click add to create a new filter. Choose the module you are searching on (this includes child modules), the field, the operator, and the value. You can also add additional criteria, or view or edit the advanced query. You can then save or run the filter from here.

dd Filter	Σ
lter Name:	
Build-A-Filter Advanced	
Work Orders Status Less Than	

• This will load up a filter set of all of our open work orders.

1					Work Orde	rs			\
	Þ	١ - 🗐	🏋 🚔 🛔		; 🖪 📀 🗟 📘	WOs 📈	10 - 1	of 141 GO >	>>
		Work Order #	Status Text	Status Date	Category Text	Problem Text	Main Task Text	Supervisor Text	Le
÷	1	2014-00408	New Work Order	8/20/2014	Tree	E-mailed Request		BORIS ARANOV	
÷	1	2014-00406	New Work Order	8/19/2014	Sewer Pipe			RICK HONAS	
÷	1	2014-00404	New Work Order	8/18/2014	Sewer Pipe				
÷	1	2014-00402	New Work Order	8/18/2014	Sewer Pipe				
÷	1	2014-00401	New Work Order	8/18/2014					
4	1	2014-00399	New Work Order	8/18/2014	Sewer Pipe			George Butler	
÷	1	2014-00398	New Work Order	8/15/2014	Sewer Pipe	Pipe Repair	Sewer Line Break Repair	RICK HONAS	Ca
÷	1	2014-00396	New Work Order	8/14/2014	Parks and Landscape Division			RYAN BROKE	
÷	1	2014-00395	New Work Order	8/11/2014	Park Court			FOREST SCHOTTERHEIM	
÷	1 🖻	2014-00392	New Work Order	8/8/2014	Park			DONALD BRICK	

Notes:_____

Grid Filters & Sorting

How many of these open work orders are on a sewer asset?

• Each field within the grid has its own sort and filter functions to find records quickly. You can use these to sort the values

numerically or alphabetically, or filter for a specific value or criteria. We will use these to narrow down our Open Work Order filter set for just Rick Honas' work orders.

- Go to the supervisor text field. Notice when you hover below the "Supervisor Text" title, two buttons appear, a sort and filter button. Let's use the filter button to only view the work orders where he is a supervisor.
- This will show us a view of all open work orders where the category contains the word sewer (Sewer Pipe, Sewer Structure, etc).
- We can use the sort button to reorder any field. Let's use the status date field to see when the oldest work order in a sewer category is.

Status Date Category Text

Category Text

Contains

Sewer

Clear Clear All Filters Apply

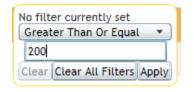


<i>Note:</i> You can see which fields have active sorts or filters on them by	
the highlighted buttons on the toolbar.	

Creating and Loading Subsets

Work Order # Status Text

How many open work orders do we have where a sewer pipe is longer than 200 feet?



Next let's use an asset module to define a subset, and then load it into our Open Work Order filter. Let's open up the Sewer Pipe module by going to Modules>>Sewer>>Inventory>>Sewer Pipes.

Supervisor Text

- Use your filters to search for all pipes with a Length of greater than or equal to 200.
- About half of our pipes meet this criteria. Let's create a subset using the subset button 100 .

Problem Text

Main Task Text

Subsets				23
Name	Count	Last Modified By	Last Modified Date	Expiration Date
Mill Crek Sewer Pipes	75	Lucity	9/9/2013	
Sewer Pipes	453	Lucity	9/11/2012	
Upstream of 1068 S Wanda Dr	3	Lucity	8/15/2014	
My Subsets Only			N†	tı 🖻 🖪 🖪
 Filtered Set Selected Reco 	ords		Mark Permanent 9/4	/2014
Name: Pipes 200 ft or Longer				
				Cancel Save

• Save your subset. Now, go back to your Open Work Order filter. You can then load the subset you just created into your filter using the subset button. Select the appropriate inventory category, and then the load into filter button. Alternatively, you can open all work orders that include pipes in the subset, and then filter again for the open work orders.

21200 - Sewer Pipe Name	Count	Last Modified By	Last Modified		Selected Catego
Mill Crek Sewer Pipes	75	Lucity	9/9/2013	butt	Expiration bate
Pipes 200 ft or Longer	225	RHonas	8/25/2014		9/4/2014
Sewer Pipes	453	Lucity	9/11/2012		
Upstream of 1068 S Wanda Dr	3	Lucity	8/15/2014		

• We now have only 10 records displaying. Keep in mind that each of these work orders includes a sewer pipe over 200 feet, but there may be shorter pipes included as well.

Property Viewer

What other assets and work orders exist at a specific address?

• If we are going to do work at a specific address, you may want to see what other assets or historical work orders or requests exist at that location. Let's find a new work order and see the related information. We will use the filter function to find Work Order #2014-00398.

1	No. Elbon oversently, ant	۲	— P	2014-00398	New Work Ord	ler 8/1!	5/2014	Sewer Pipe	Pipe Repa	ir S	ewer Line B	Break Repair	RICK HONAS	Casey Wor	ker	4 8	8/16/201
	No filter currently set	Ł		Comments (D) Locations	(1) Ass	ets (1)	Work Order T	racking (1)	Work C	Orders (0)	Work Reques	s (0) PM/Wo	ork Templates	(0) Tasks	(1)	
	Equal 🔻	l			t 🏫 🗔	0		×		Loc	ations 🍃	<		10 💌			
	2014-00398	ļ			Location No	Address	Str Dir	Street Name	Str Type	Address 2	Str Dir 2	Street Name 2	Str Type 2	.oc X Coord.	Loc Y Coord	I. General Locat	ion
	Clear Clear All Filters Apply	J		e	1	1068	s	WANDA	DR								

• We have an address for this work order. Let's use the Property

Viewer **I** tool to see what else is here.

• We can also see that there is a sewer structure, and a recent work order at this same location.



Filtering and Exporting

Filters with Reserved Words

How many work orders do I still have open from last month?

- You can also use advanced queries with the web filter like in the desktop. This also allows you to take advantage of web-only "Reserved Words". These allow you to input a string that dynamically pulls a filter set based on the time you run the filter, and also based on who is running it.
- First, let's create a new filter. We are going to search for all open work orders with a status of less than 950, where the supervisor is Rick Honas, and the status date falls between the first and last day of last month. If we do a count, we see that this filter will return 5 records.

Add Filter Filter Name:	22
Build-A-Filter Advanced	
Work Orders Status Less Than 950	
Work Orders V Supervisor Text V Equal V RICK HONAS	
Work Orders V Status Date V Between V 8/1/2014 15 and 8/31/ Count & Record Count: 4 Copy OK	
Cancel Count	Save Run

Notes:______

• This filter is great, but will only return the results we want when we run it for Rick Honas, and the date range only applies to this month. We won't save this filter. Instead, let's switch to the advanced view.

Add Filter	23
Filter Name:	
Build-A-Filter Advanced	
Select * from	
WKORDER WHERE WKORDER.WO STAT CD < 950 AND WKORDER.WO_SUPR_CD = %LOGGEDINEMI AND WKORDER.WO_STAT_DT = %PREVIOUSMONTH*	PCODE%
Select Reserved V	Vord 🔻
Cancel Count Save	Run

• We can use the reserved word drop-down list to replace our supervisor with %LOGGEDINUSERID% so that the appropriate results will display for any supervisor that is logged in and runs this filter. We can also use %PREVIOUSMONTH% instead of a static date range, so that it will pull previous month records depending on the date that we run the filter. This way, the filter can be saved and never needs to be updated.

Note: For a complete list and descriptions of the reserved words available, see the help guide.

• You can see we get the same 4 results when we run this filter, and it will be correct for whoever or whenever we run this filter in the future.

Notes:	 	

Sharing Views

How can I share what I am seeing with another Lucity user?

• If you have a set of records that you want to share with another Lucity user, you can use the

Share with Others button to create a shareable URL that will open up the same record set for another user.

	ast Month
Work Orders Still Open from La The header that the user will see w	· ·
Filtered Records Selecte	
0	
URL:	
HTTP://AFOWLES-LT/LUCITYW	/EB/Public/Routing.aspx?
RouteTarget=Internal&RouteSu	ubTarget=Views&RouteAction=Open&RouteP
m1=13&RouteParam2=Work+0	
	ER+WHERE+WKORDER.WO_STAT_CD+%3c
	R_CD+%3d+'%25LOGGEDINEMPCODE%25'+AND +'%25PREVIOUSMONTH%25'&end=true
interestine_stat_states	and the story more than a contraction

Exporting Data

How can I get a copy of the records in my filter set for a non-Lucity user?

• If you need to get the data from a record set outside a Lucity (i.e., to e-mail to a contractor, or export for a bar graph in a spreadsheet program), you can export the current filter set by e-mailing a zip file that contains a delimited text file. This is done using the Export Current

View 🔤 button.

• You can define the recipient's email address, the e-mail subject, the name of the file (prefaced with Username_), and change the zip file's extension (to get past an e-mail filter).

Data Export	23
Number of Records to be Exported: 3281	
Email Account(s) Export File Will be Sent to:	
Please enter valid email	
use semicolon or comma between emails - i.e. smith@company.com;jones@company.com	
Subject Line on Email:	
Lucity Export for Work Orders	
Name of Attachment File for Email - (user name concatenated):	
RHonas_ WorkOrders .csv (default)	
Extension for the compressed exported File: . zip	
Cancel OK	

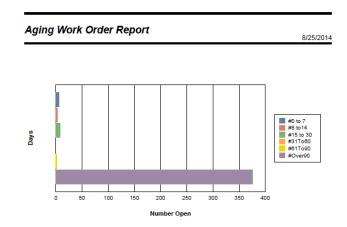
Web Reports

How can run a report to let us know the ages of our open work orders?

- First, you will need to set up an applicable filter. Let's look at all of our open work orders. Run the saved filter for all open work orders.
- Next, we will use the reports button to select a report from our available web reports. Let's choose the Aging Work Orders Graph report.

leports		2			
Report Group: All 💌					
Report Name	Report Description				
Work Order Summary With Asset Report	Work order summary report with Asset information	-			
Work Order Task Resource Report	Work Order Report Listing Tasks and Resourses.				
Work Orders At Same Location - Sorted by Street	List of WOs at the same address.				
Work Orders with Related Requests Report	Work Order data with information from related Requests.				
Work Response Time Report	A summary of action times for the work order based on start time to work completed.				
Work Task Cost Comparison Report	Compares estimated and actual costs (labor, parts, equipment, etc.) and the difference between them	n			
Work Task Cost Report	Report shows Actual costs for each Task by Work Order.				
Work Task Cost Summary Report	Report shows a cost summary of each Work Order Task.				
Aging Work Order Report	Lists work orders, age, and key data for work orders that have not been closed. Based on date created	i.			
Aging Work Orders Graph	Dashboard report showing an aging work order report.				
Aging WOs by Category with Problem Summary	A list of Work Orders grouped by Category with crosstab summary of Problems per Category and a bar	E			
Average Open Time for Work Orders	Selects WO records with Status>950 and calculates days open by the difference in WO End Date and W	c			
Completed Work Order Summary	Lists Completed Work Orders Summarizing Costs and Labor Hours.				
Contractor Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Contractor along with Task and Work Order Information	л			
Contractor Usage Summary Report	Summarizes Cost and Quantity information of Contractor used in Work Orders.				
Crew Assignment Report	Displays Work Order Number, Supervisor, Start Date, Main Task, and Location grouped by Crew.				
Work Order Detail Report	Provides all data in Module.				
Aging WOs with Linked Wos	Aging WOs with open linked WOs.				
Closed Work Orders with Open Associated PMs	Closed Work Orders with associated open PMs summary report				
Asset Summary Report	Summary Report of Work Order Assets				
Aging Work Order Report - New Work Orders	List of new WOs and how long they have been open.				
•	•	ſ			
 O All Records ● Filtered Set O Selected Records View as PDF Send to Email View as HTML 	+ / -				

• We have a few options. You can run the report on all, filtered, or selected records. Let's choose the Filtered Set. You can also choose how you want to create the report: as a pdf, sending it to an e-mail address, or viewed as HTML. Let's view a pdf file.



Note: You can run any number of reports on your data. If you have a custom report you use in the desktop, it will need to be web-enabled before you can run it on the browser.