

TRAINING GUIDE

Basic Functionality -Desktop

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Lucity - Basic Desktop Functionality

In this workbook, we will introduce you to the basic layout and functionality of the Lucity desktop system. This includes menus, form layout, fields, toolbars, adding/editing/deleting records, finding records, and filtering records. We will also introduce you to Asset and Work Management topics.

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Introduction to Asset Management

The Lucity[™] suite offers you a comprehensive solution for Asset Management. Our user-friendly inventory and inspection modules are all structured around the basic functions discussed in the following pages. These modules allow you to manage your asset inventory, assess the condition of your assets, and determine your maintenance needs. Our modules have been created specifically for Public Works Departments and allow you to manage your water, storm, and sewer assets, transportation system, fleet, facilities, trees, and parks.

System Inventory

Each solution provides inventory modules for comprehensive data capture of your assets and their components. The inventory modules consolidate asset information into a single database. You can easily retrieve and analyze this data using the built-in filtering and reporting capabilities. Additionally, each solution provides functionality designed specifically for the assets you are managing. For example, the *Pavement* module provides you with maintenance forecasting and budget forecasting capabilities, while the *Tree* module allows you to create a library of scientific information about the trees in your system, as well as determine the value of each tree using two distinct valuation methods.

Field Inspection

Most inventory modules have corresponding inspection modules that allow you to manage your system's condition assessment data. These modules are fully integrated. Physical data in the inventory databases links directly to the inspection modules. When you correct discrepancies in the inspection modules, the inventory data automatically adjusts. By compiling and analyzing inspection data, you can detect trends in system performance and organize rehabilitation plans for maximum efficiency.

Introduction to Work Management

The *Lucity*[™] suite also offers you a comprehensive solution for Work Management. The *Lucity Work* module allows you to track customer requests, create work orders, establish a preventative maintenance plan, set priorities, provide timetables, track system rehabilitation, manage work projects, and perform budget forecasting.

Work Orders

The Work Orders module allows you to schedule and track work tasks, personnel, equipment, and material usage. Three versions of work orders are offered on the desktop: Standard, Lite, and Daily Work. All three modules integrate with the same data set. The Standard module is the most comprehensive of the three, offering additional functions such as costing, billing, and tracking. Work Order Lite contains only the basic functions of the Work Order Standard module. This allows for quick and easy data entry. The Daily Work module is the most basic of the three, designed for quick data entry without your fingers ever having to leave the keyboard.

Mobile Desktop

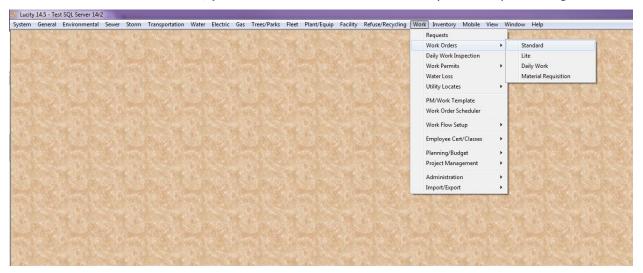
Mobile Desktop allows you to upload and download work orders to and from the field as well as almost every Lucity inventory and inspection module. In this manner, you can mobilize your work management database. This solution is available for handheld devices, tablets and laptop PCs.

Menus

The menu bar will help you navigate through the $Lucity^{\mathbb{M}}$ desktop suite. After logging into the system, you'll see a menu bar at the top of the screen:

Lucity 14.5 - Test SQL Server 14/2

The menu items correspond to individual groupings in the software, system functions, and the help guide. Each main menu item contains a drop down menu listing each available module. For example, under the Work main menu item, you can see a list of all modules that pertain to performing *Work*.



Although the menu bar contains all of the capabilities and programs offered by Lucity, only those purchased will be accessible. If you click on a program that you have not purchased, a drop-down menu will appear; however, the menu items will be disabled (grayed out).

Form Layout

Each application in the *Lucity*[™] desktop suite has a window designed specifically for the information recorded in that module. Although each module has unique features, the components that make up each window are the same. This helps make the desktop easy to use. The basic components of each window are the Module Toolbar, Header Data, Fields, Field Captions, Attribute Tabs, and the Status Bar. We'll discuss each of these components in the following pages using the *Work Orders* module as a guide.

Module Toolbar

At the top of each window, you'll see a Module Toolbar.

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Work Order # 2014-00643	Category		41200	Hydrants		
Status 2 New Work Order	Problem		INSP	Routine Inspection		
Status Date 08/22/2014 💌 11:19 AM	Main Task		WTDHYM	Hydrant Maintenance		
W0 Location Assets List/Events Tasks/Res Routing Costs	Billing Related	Request	s/Track Links	Custom 1 Custom 2 Com	ments	
Asset 2428 Clow Medalion Dry-Barrel Location 2643 S DEW DROP LN				Comment Fro	m Request	
Cause						
Assigned Crew				<u> </u>		×
Supervisor 105 COREY COLA	As	signed By			Overri Notificat	
Lead Worker	Assi	gned Dati	e 📕 🖊	▼ : AM	Problem	
Priority	S	tart Date	I 77	▼ : AM	Overdue	
Account #	E	nd Date		▼ : AM	Lead Worker	
Proj No - Acct			1		Task	
Project Text	Mast	er Project			Supervisor	
Reason		Name			Hard Lock WO	
				Record 1 of 1	View Mode Read	ty

This toolbar contains buttons that perform or access a variety of standard functions. Place your cursor over an icon to see the name/function of that particular toolbar button. For example, if you place your cursor over the icon that resembles a printer, the words "Print Module Window" appear.

Since each module's toolbar may vary, there may be instances where buttons appear to be "grayed out". These buttons are inaccessible for that module; nothing will happen when they are clicked on.

😫 Work Orders - Filter = Non-Complete									
	5	9	ñ	Ŧ	9	-	•••	- 🗊 Ð	
	Prin	it Mo	dule	Wi	ndow	7			

Toolbar Buttons

Button	Name	Description
	Resize	Resizes the module window.
<u></u>	Print Module Window	Captures the screen image and sends it to your designated printer.
	Locate	Quickly locates specific records.
<u><u></u> •</u>	Browse	Browses records, produces quick custom reports, and exports information.

<u> </u>	Filter	Opens the Filter window.
	Reports	Views, prints, or adds/deletes reports to or from the list of pre- defined reports.
ď	Open Document	Views a list of documents, videos, and images attached to the record.
Ð	Document Control	Adds or deletes documents, videos, and images to or from the record.
	Save	Saves your changes.
×	Cancel	Cancels any changes you have made since the last save.
<u></u>	Add Record	Adds a new record to the module.
1	Edit	Edits the current record.
*	Delete	Deletes the current record.
	First, Previous, Next, Last	Navigates through the data set.
4	Go To	Views a specific record number.
4	Refresh	Re-queries the data set and returns your screen to the first record in the filtered set (i.e., it runs the filter again).
函	Relationship	Displays other modules related to the current record.
	Subsets	Creates and saves a set of filtered records.
	Work Order	Generates a Work Order for the current record.
	Work Request	Generates a Work Request for the current record.
	PM/Template	Generates a PM/Template for the current record.
	Toolkit	Opens the Toolkit dialog box. The existence of this button and the options inside the Toolkit dialogs vary by module.
<u>.</u>	Show In Map	Opens GIS, zooms in, and highlights the selected feature.
	Recalculate	Updates all calculations in the module.
<u>.</u>	Help	Opens the Lucity Help Guide to the appropriate topic chapter.
<u>È</u>	Close	Closes the module.

Adding, Editing, and Deleting Records

The steps for adding a new record, editing the current record, or deleting a record are the same throughout the modules:

To Add a New Record:

- 1. Click 🖄 on the module toolbar to add a record. You are now in Add Mode.
- 2. Enter any Header data or required data.
- 3. Enter any additional information in the Attribute Tabs.
- 4. Click 📕 to save the record.

To Edit the Current Record:

- 1. Click *I* on the module toolbar to edit the current record. You are now in *Edit Mode*.
- 2. Make the necessary changes.
- 3. Click 📕 to save your changes.
- 4. Click 🔀 to exit *Edit Mode* or cancel your changes prior to a save.

To Delete a Record:

- 1. Locate the record you wish to delete.
- 2. Click to delete the record.
- 3. You will receive a prompt asking you to confirm the deletion. Take care when deleting records as this action cannot be undone.

Your security settings may limit who can add, edit, and delete records.

Notes:___

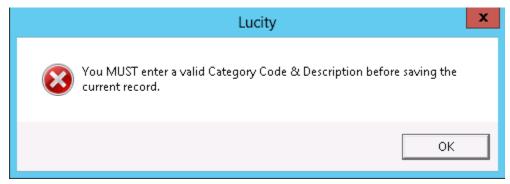
Header Data

At the top of the module window you will see header data. This is visible regardless of which tab is displayed below. It is important to enter data in the header for each new record because this information defines or distinguishes each record using unique IDs.

<u>ei</u>			Work Ord	ers - No Filter				
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Work Order #	2014-00643		(Category	41200	Hydrants		
Status	2 New Work	. Order	F	Problem	INSP	Routine Inspection		
Status Date	08/22/2014 💌	11:19 AM	м	ain Task 🛛 📗	WTDHYM	Hydrant Maintenance		
WD Location As	sets List/Events T	Tasks/Res Routing Co	ts Billing	Related Reques	ts/Track Links	Custom 1 Custom 2 Co	omments	1
						Comment	From Request	
Asset 2428 Clow M							· · · · · ·	<u>^</u>
Location 2643 S DEV	V DROP LN							
Cause								
Assigned Crew								
		COREY COLA		A seizu a d D	y I		Overri	ide
Supervisor	105			Assigned B			Notifica	tions
Lead Worker		Casey Worker		Assigned Da		▼ : AM	Problem	_
Priority				Start Date		• : AM	Overdue	
Account #				End Date		▼ : AM		
Proj No - Acct				Master Project			Task Supervisor	
Project Text				Name				
Reason				IN diffe			Hard Lock WO	
						Record 1 of 1	View Mode Rea	dy

Header data varies with each module. In most modules the header data consists of an ID number or some other number that identifies the asset represented in that record. Many modules have fields required by the system in the header, meaning a record cannot be saved until data is entered in these fields. You will receive an error message if you attempt to save the record without that required information.

For example, here's a message that will appear in Work Orders if the fields required by the system aren't filled out upon saving:



If a user has set a field to required, the field will display in blue.



Each module has various tabs to organize and store similar types of data. You can see on the screen below that the *Work Orders* module has tabs for WO (Work Order attribute data), Location, Assets, List/Events, Tasks/Resources, Routing, Costs, Billing, Related, Requests/Tracking, Links, Custom1, Custom2, and Comments. Although tabs vary by module, each module typically has Custom and Comments tabs. To navigate through the record, click on the tab names. The display will change accordingly.

🖼 Wo	r <mark>k Orders - N</mark> o Fil	ter		— — <mark>×</mark>
		🥖 🖗 명 🔛 I	• 🔇 • 🖉 • 🗩	
Work Order # 2014-00643	Category	41200	Hydrants	
Status 2 New Work Order	Problem	INSP	Routine Inspection	
Status Date 08/22/2014 💌 11:19 AM	Main Task	WTDHYM	Hydrant Maintenance	
W0 Location Assets List/Events Tasks/Res Routing Costs	Billing Related Req	uests/Track Links	: Custom 1 Custom 2 C	Comments
Asset 2428 Clow Medalion Dry-Barrel Location 2643 S DEW DROP LN			Comment	t From Request
Cause Assigned Crew				~
Supervisor 105 COREY COLA	Assigne	d By		Override Notifications
Lead Worker	Assigned	Date 🚺 🛛 /	▼ : AM	Problem
Priority	Start D	ate 🚺 🗍 77	▼ : AM	Overdue
Account #	End Da	ate 🚺 🗍 77	▼ : AM	Lead Worker
Proj No - Acct				Task 🗖
Project Text	Master Pro	iject ID		Supervisor
Reason	Nam	e		Hard Lock W0
			Record 1 of 1	View Mode Ready

Notes:____

Status Bar

The status bar, located at the bottom of the module window, performs a variety of functions. It allows you to see what record number you are viewing as well as how many records are in the current set.

When you add new records, a filter is automatically created with just your new records. When you are creating new records, you may not want to see all of the existing records.

So, the status bar on the newly created Work Order only shows "Record 1 of 1":

🖼 Work Ord	ders - Unnamed F	ilter Set		— — ×
		4 🔃 🖫 🖬 🖬	• @ • @ • 🖻	
Work Order # 2014-00643	Category	41200	Hydrants	
Status 📕 🖪 New Work Order	Problem	INSP	Routine Inspection	
Status Date 08/22/2014 💌 11:19 AM	Main Task	WTDHYM	Hydrant Maintenance	
WO Location Assets List/Events Tasks/Res Routing Costs	Billing Related Req	uests/Track Links	Custom 1 Custom 2 Co	mments
Asset 2428 Clow Medalion Dry-Barrel Location 2643 S DEW DROP LN			Comment F	irom Request
Cause Assigned Crew				~
Supervisor 105 COREY COLA	Assigne	d By		0verride Notifications
Lead Worker	Assigned	Date 77	• : AM	Problem
Priority	Start D	ate 🚺 🗍 7.7	▼ : AM	Overdue
Account #	End D	ate 🚺 🗍 🖊 / /	• : AM	Lead Worker
Proj No - Acct				Task 🗖
Project Text	Master Pro	·		Supervisor 🗖
Reason	Nam	e		Hard Lock W0 🕅
Press F9 for pop-up selection			Record 1 of 1	Edit Mode Ready

To view all existing Work Orders including our newly created Work Order, click the Filter button drop

down list and select *Reset Filter*. The record count will now display the total number of Work Orders:

Press F9 for pop-up selection	Record 5057 of 5057	Edit Mode Ready
-------------------------------	---------------------	-----------------

On the desktop, newly added records generally get put on the end of the existing data.

The status bar also allows you to see whether the current record is in View Mode, Add Mode, or Edit Mode. For example, this record is in Edit Mode. The status bar may also display any messages regarding available Hot Keys or other special functions. The status bar above tells you that by pressing the <F9> hot key, a pop-up list of choices will appear. Finally, the status bar alerts you when the system is busy performing another function. In this example, the status bar reads "Ready", meaning the system is not performing any other function at this time.

Grids

Each module on the desktop may have one or more grids that appear throughout the tabs. Many of these grids indicate special relationships. Several grids also contain actions that can be performed on the data inside the grids.

Grid Relationships

The grids inside a module can indicate special relationships. In Work Orders, there is a grid that displays the Assets that are included in the Work Order. The assets are considered "children" of the current Work Order. The Work Order would be considered a "parent" of the assets. Some of the grids also contain "linked" records that are related to the current record through special relationships.

🖼 Wa	ork Orders - No Filter		— — ×
	▋◀▶▶ ቅ୬፼매	l 🛋 🔍 🔹 🧶 🖛 🔛	
Work Order # 2014-00643	Category 41200	Hydrants	
Status 2 New Work Order	Problem INSP	Routine Inspection	
Status Date 08/22/2014 🔽 11:19 AM	Main Task 📗 WTDHYN	Hydrant Maintenance	
WO Location Assets List/Events Tasks/Res Routing Costs	Billing Related Requests/Track	Links Custom 1 Custom 2 Con	nments
Seq / Category Text System ID 1 Completion Date Co)dometer Hourmeter
1 Hydrants 2428	Clow Medalion	Dry-Barrel	
< III			>
Associated Tasks			•
Task Text Cost Task Start Date	Task End Date Status Text	Task Supervisor Text	
		Record 5057 of 5057	View Mode Ready

Notes:___

Occasionally, a grid inside of a module can contain parent records to a child grid beneath it. Clicking on one of the parent records will display only its children in the grid beneath it. For example, the WO Tasks are a "parent" of the Resources and the Resources are considered "children" of the WO Tasks. So, clicking on the task parent will only show the resources that are associated with that task:

<u>ei</u>				W	ork Orders - No	Filter						_ 0
<u> </u>	3 <mark>8</mark> A	• 😌 • 🖻	- 20	I 🏈 / ≍ ằ 🔍		> 4	<mark>ه ج: ا</mark>	<u>s</u> 🕳 🤅	2 - 🤗	- 🖻]	
	Work Order	# 2014-006	43		Category		41200	Hy	drants			
	Status	2	New Work Orde	er	Problem		INSP	Re	utine Insp	ection		
	Status Date	08/22/20	14 🔻 11:19) AM	Main Task		WTDHYM	1 Hy	drant Mair	ntenance		
WC	Locati	on Assets List	/Events Tasks	Res Routing Costs	Billing Related F	Requests	s/Track I	Links C	ustom 1	Custom 2	Comments	
	-Work Tasl		sk Text	Task Start D	ate Task End	Date	Status	s Text	100	4 [alc'd Unit Cost	# of Units
	1 Rc	outine Inspection Idrant Flow Test		- Add Start D		2.010	010101	- i onv	Each		0.00	0.00
	2 119								Eddin		0.00	0.00
	<			Ш								>
	Resources Group	Туре	Resource	Resource	e Text		ІОМ	Units	Cost		Alt De	escription
		Employee Material	KC 9543	Casey Worker Hydrant Paint, Red		Gallon		0.00 0.00	0.00 0.00			
	<			II	I							>
									Record 5	057 of 50	57 View	v Mode Ready

Notes:	 	

Grid Functions

In addition, the records in the grids may have actions that can be completed on them. To see if there are actions that can be performed, highlight the record in the grid and click the right mouse button. Any functions that are available for that record will appear. These are also known as "Right-Click" or "Right-Mouse" functions. For example, the "Right-Click" functions for the "Routine Inspection" task are displayed here:

앮	We	or <mark>k Orders - N</mark> o Fi	ter				>
◼◓◙ਸ਼੶ੑ੶੶੶੶੶₽₽	1 × %		<mark>⊮ ©ھ</mark> ا⊀	🔜 🗀 🍳	2 - 🧶 -		
Work Order # 2014-00643		Category	41200	Hy	drants		
Status 2 New Work Order		Problem	INSP	Re	outine Inspecti	on	
Status Date 08/22/2014 💌 11:19 AM		Main Task	WTDHY	Ή	drant Mainten	ance	
W0 Location Assets List/Events Tasks/Res	Routing Costs	Billing Related Re	uests/Track	Links C	ustom 1 Cu	stom 2 Comments	
Work Tasks	T 1 01 1 D	Jate Task End Da		us Text	UOM		# of Units
1 Routine Inspection	Task Start D			usiext		Calc'd Unit Cost 0.00	0.00
2 Hydrant Flow Test		View Record Add Record Edit Record Delete Record		Each 0.00 0		0.00	
				-			
< III		Populate Main Task					>
Resources		Populate Multiple Ta	iks	-			
Group Type Resource Employee KC Case	Re v Worker	Populate Dates		Units 0.00	Cost 0.00	Alt De:	scription
	ant Paint, Re	Populate Task Units 0.00 0.00 Complete					
	Lin			-			
				1			
		II					>
					Record 5057	of 5057 View	Mode Ready

Fields and Field Captions

Each record contains various field types and field captions. Fields are the locations on the window where data is entered. Each field is preceded by a field caption button.

Field captions define what information should be entered into a particular field. For example, the first field caption below is titled "Priority". A priority of 1 - High has been entered in the corresponding field.

Field Caption —	Priority I High	
Field ———	Account # 4863138	

All fields have a field definition window and a field properties window. You need to be in View Mode in order to see the Field Properties, Field Caption, and Global Edit functions. You can access these functions by placing your cursor over a field and using **Ctrl + Right Click**.

Account #		
Proj No - Acct		Field Definition
		Field Properties
Project Text		Field Caption
Reason		
	1,000,0	Global Edit

These windows allow you to view or change the field

definition, change the decimal point placeholders in a numeric field, make field entry required or restricted, etc.

Some fields are editable and others are static (meaning you cannot modify them). Editable fields have a white background while static fields have a gray background. A few special fields have a Global Edit option. This option allows you to mass-populate a field in your filtered record set without having to update each record individually.

Notes:____

Field Instructions

Some fields may have special function keys that are applicable to that field. These functions enable a user to perform a task more quickly. A short instruction would display on the status bar when the cursor is inside the field. For example, in the WO Task module, there are instructions for the Task field. If a user would like to filter the list, they could first enter the characters and click F7. In the example below, the Task list is filtered by those that start with 'WT':

S		Work	Order Tasks				x
P 🗗 🖬 🖉 🖊 🗙		• % 🛋					
Task WT Task Crew Task Supervisor		•	Bra	A Labor Hours anch Name to	IZ I I I I I I I I I I I I I I I I I I		
Task Start Date / / Task End Date / /		⊂SubTask- ⊂Showy	<u>A</u> ll	\$			
Status		Task▲	Action or Tas		Class	Unit Cost	<u>^</u>
Account #		WTCON01 WTDHYFT WTDHYIN WTDHYIN WTDHYM WTDHYP WTDHYRP	Water Conservation Water Conservation M Hydrant Flow Test Hydrant Install Routine Inspection Hydrant Maintenance Hydrant Replace Hydrant Replace Hydrant Replace Hydrant Replace Hydrant Replace Hydrant Replace Dist Maintenance/Equij Miscellaneous Site Cleanup	Each Each Each Each Each st Each Each)
Task User 3 Address		Caption		OK		Cancel	
Press F9 for Popup F7 for Filt	tered Popup			Record 0	of 2 A	dd Mode Rea	dy

Here are some examples of fields that use the F5 key to copy a value from one field to another:

- In Requests, from the Phone field to Home Phone, Phone 1 or 2, or Work Phone.
- In Work Orders, from the Start Date to the End Date.
- In Work Orders, from the Total Cost to the Billing Amount.
- In Fleet Travel Log, from the Starting Odometer to update from the previous record.

Field Types

There are different types of fields available for data entry. For example, some fields require numerical data while others require text. A brief definition and example of each field type is listed in the table below.

Code-Description or "Picklist" Fields Priority 1 High	These fields require you to enter a code in the first box. The code description will then appear in the grayed-out box. For example, a code might be 1=High, 2=Medium, 3=Low, etc. The number 1 would go in the first field and the description "High" would automatically appear in the second field. The codes and descriptions are created and then accessed through a picklist.
Quantity 7.00	Numeric fields only allow a number to be entered. Depending on the field, the numbers may or may not contain decimals. Most numeric fields are right- justified.
Subcontractor	Text fields allow both letters and numbers to be entered. Most text fields are left-justified.
Logical (checkbox) Fields Billing Required	Logical fields allow you to enter a checkmark in the box if you wish to select that field.
Inspection Date 08/09/2014 ▲ August, 2014 ↓ Ciatic Sun Mon Tue Wed Thu Fri 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 Today: 8/18/2014 5 6 7 8 9	Date fields can be manually or automatically entered. To manually enter a date, use the mm/dd/yyyy format. Use the arrow keys in place of the backslash. To automatically enter the current date, hit the space bar while your cursor is in the field. You can also use the drop-down menu to select the date from a pop-up calendar. You can then use the arrow keys at the top of the calendar to select a different month or year.
Time Fields 01:47 PM	Time fields can be manually or automatically entered. To manually enter a time, use the arrow keys in place of the colon. To automatically enter the current time, hit the space bar. To identify AM or PM, enter an "A" or "P" after the time or use the up or down arrow keys on your keyboard.
Comment Fields	Comment fields allow users to enter multiple lines of text in paragraph form. These comment fields have copy/paste abilities and carriage returns using Ctrl + Enter .

Tools

Locate



The locate feature allows you to quickly find specific records within the current record set. The following example is from the Work Order's module; however these same steps apply in all other modules. You can use this feature if you know specific identification information about the record you are looking for, or if you'd like to search through a list of the records available.

To access the locate feature, click 🕺 on the module toolbar.

8			Locate	_ D X
Work (Order # to Locate:			Open Cancel
	Work Order #	Status Text	Category Text	Main Task 1
4836	2011 00112	New Work Order	Admin	
4837	2014-00413	New Work Order	Admin	Blue Stake Inquiry from a Resider
4838	2014-00414	New Work Order	Meters	
4839	2014-00415	New Work Order	Call Center	
4840	2014-00416	New Work Order	Admin	
4841	2014-00417	New Work Order	Sidewalk	
4842	2014-00418	New Work Order	Sewer Pipe	
4843	2014-00419	New Work Order	Call Center	Info Calls Environmental
4844	2014-00423	New Work Order	Meters	
4845	2014-00424	New Work Order	Call Center	
4846	2014-00425	New Work Order	Park	
4847	2014-00426	New Work Order	Call Center	
4848	2014-00427	New Work Order	Equipment	
4849	2014-00428	New Work Order	Meters	
4850	2014-00429	New Work Order	Meters	
4851	2014-00430	New Work Order	Meters	
4852	2014-00431	New Work Order	Call Center	
4853	2014-00432	New Work Order	Equipment	
4854	2014-00433	New Work Order	Fleet Maintenance	
4855	2014-00434	New Work Order	Call Center	×
<				>

Your search is organized by the fields at the top of the window. Click on the column header for the field you want to search by. The selected header text will be shown in red italics and the records in the dialog will be sorted by that field. In the example above, the "Work Order #" header is selected. You can search for a record by scrolling through the list shown or by using a dynamic search. In a dynamic search you will use the text box at the top of the window to enter the information you are looking for. In this example, we've entered Work Order # 2014-00643 and the system has found the corresponding record. The record found by the system will be highlighted in red.

9			Locate	_ _ X
Work 0)rder # to Locate:	2014-00643		Open Cancel
	Work Order #	Status Text	Category Text	Main Task 1-
5039	2014-00625	New Work Order	Hydrants	
5040	2014-00626	New Work Order	Hydrants	
5041	2014-00627	New Work Order	Hydrants	
5042	2014-00628	New Work Order	Hydrants	
5043	2014-00629	New Work Order	Hydrants	
5044	2014-00630	New Work Order	Hydrants	
5045	2014-00631	New Work Order	Hydrants	
5046	2014-00632	New Work Order	Hydrants	
5047	2014-00633	Closed In Field	Hydrants	
5048	2014-00634	Complete	Hydrants	
5049	2014-00635	Closed In Field	Hydrants	
5050	2014-00636	New Work Order	Hydrants	
5051	2014-00637	New Work Order	Fleet Maintenance	
5052	2014-00638	New Work Order	Admin	Blue Stake - Other Inquiry
5053	2014-00639	New Work Order	Equipment	
5054	2014-00640	New Work Order	Hydrants	
5055	2014-00641	New Work Order	Equipment	
5056	2014-00642	New Work Order	Fleet Maintenance	
5057	2014-00643	New Work Order	Hydrants	Hydrant Maintenance
<				>
<				

The system will also search for partial text. In the example above, when "2014" is typed, the red line will jump to the first record beginning with "2014". As you continue typing, the highlighted line will move to match your search item. This function is performed automatically.

Once you have found the record you are searching for, click Open, double click, or hit <**Enter**> on the keyboard. The module will open to the highlighted record.

Notes:_____

Filtering Records

A filter helps you narrow your search for a specific record or set of records. You can use filters to find and work with only the records you want without having to deal with the entire record set. For instance, you may be trying to manage your Work Orders, but find that you have to sort through other people's records as well. A Filter will allow you to work with only your desired records.

Once you're comfortable with filtering, you'll be able to use filters to get a great deal of specialized information out of the system. You can find assets that are costing you the most in maintenance, do cost and trend analyses, and much more.

There are three ways to open a filter:

There are three ways to open the filter window:

- 1. When you open a module for the first time you will be prompted to define a filter before any records are displayed.
- 2. After a module is already opened, you can set up a filter by clicking the filter button in the toolbar \heartsuit .
- 3. In the Filter drop-down list **I**, you can select the "Filter" option.

Using the Filter Window

7		Work Order	Filter	
Filter	Sort Pg. 3 Pg. 4	Pg. 5 Pg. 6 Pg. 7 Pg. 8 P	g. 9 Pg. 10 Address 2nd 💶 🕨	Selected Filter:
				WOs Not Complete
[Author	Filter 🛆	Advanced	
	stan stan	Casey's Work Orders WOs 1/1/14 thru 6/30/14	No No	Make Default
	stan	WOs Not Complete	No	
				Delete
				Cancel
				Reset
				Advanced
				Rename
				Save As
	<	Ш	>	Save
L	Default Filter:			
	🔽 Skip This Screen 🛛 C	Load Default Filter 💿 Load All Reco	rds My Filters Only 🔽	Count Records Go

Filter

The "Filter" option is the first tab in the Filter window. This tab contains a list of saved filters. If this is your first time using the module, no filters will be saved.

ter Sort Pg. 3 Pg. 4 Pg. 5	Pg. 6 Pg. 7	Pg. 8 Pg. 9 Pg. 10 Address 2nd	Selected Filter:
Sort Selectable		Selected	
Work Order # Status Status Text			Make Defaul
Status Text Status Date Status Time Category			Cancel
Category Text Problem Problem Text Cause	>		Reset
Cause Text Main Task Main Task Text Assigned Crew			Advanced
Assigned Crew Text Supervisor Supervisor Text Lead Worker	~		Rename Save As
Select List Order		Sort Order	Save
 Standard Order Alphabetical 		 Ascending Descending 	Count Record

Sort

The "Sort" option is the second tab on the Filter window. THIS IS NOT A FILTER (and you can skip this step). You can set up a sort order to view records in ascending or descending order based on the field(s) you select. To use the sort function, complete the following steps:

- 1. Highlight a field in the "Selectable" list. You can use the selection buttons at the bottom of the grid to change the order in which the fields appear. "Standard Order" reflects the order in which the fields appear in the module itself. If you'd prefer, you can change it to "Alphabetical" order.
- 2. Click the right arrow and the field appears in the "Selected" list. You can select as many fields as you like from the list. Use to remove an item from the list.
- 3. Click the "Ascending" or "Descending" buttons under the "Selected" list to indicate how you want the records sorted.
- 4. Click "Reset" to clear all "Selected" fields and start over.

Filter Tabs

The remaining tabs in the Filter window (Pg. 3, Pg. 4, Address, etc.) contain all of the filterable fields. You will use these tabs to set up your filter criteria.

💙 Work Order Filter				
Filter Sort Pg. 3	Pg. 4 Pg. 5 Pg. 6	Pg. 7 Pg. 8 Pg. 9 Pg. 10	Address 2nd S	elected Filter:
Work Order #	<none></none>		4	No Filter
Status				Make Default
Status Text	<none> <none></none></none>			Delete
Status Date	<none></none>			Cancel
	<none></none>			Reset
Status Time	<none></none>	: AM		Advanced
Category	<none></none>	<u> </u>		Rename
		×		Save As
Category Text	<none></none>			Save
Problem	<none></none>	<u>^</u>		Count Records
				Go
				40

When you move through the tabs you'll see that the fields appear in the same order as they would in the Work Order module (or whatever module you are using). The right and left arrows \checkmark at the top-right of the screen allow you to move through the tabs and see more filter options.

Day-to-Day Work Order Filter

To help you better understand how to use filters in your daily work, we'll go over some specific examples. Supervisors are responsible for managing their own work. That means generating Work Orders from public Work Requests, creating Work Orders for new jobs, looking through Work Orders on a daily basis to schedule and manage work, editing Work Orders to keep them current, and closing Work Orders when the job is completed. All Work Orders in the Lucity system are shared, so you can view other supervisor's Work Orders as well as your own. Work Orders that are completed and closed are not erased from the system. Over time, you'll have more and more Work Orders.

In order to manage the records, you can use a filter to see only the records currently assigned to you. The following example shows you how to set a filter with a supervisor's name.

💙 Work Order Filter		X
Filter Sort Pg. 3	Pg. 4 Pg. 5 Pg. 6 Pg. 7 Pg. 8 Pg. 9 Pg. 10 Address 2nd 🕨 Selected Fi	ilter:
	No Filter	
Supervisor	<none></none>	
	Mak	e Default
Supervisor Text	<none></none>	
	equal)elete
Lead Worker	not equal Ike	ancel
	not in list	Reset
Lead Worker Text	<none></none>	
	Ad	vanced
Priority	<none></none>	
Priority Text	<none> R</none>	ename
	Sa Sa	ave As
Account #	<none></none>	Save
	×	
Proj No - Acct	(Mana)	t Records
		Go
	,	40

Filter with 'Equals' (Supervisor Name)

Since we want work orders with a specific supervisor's name, we'll set up a filter for Shane Harpo. To find his Work Orders we'll filter the records so that "Supervisor equals Shane Harpo".

Supervisor Text	equal	•	RICK HONAS SHANE HARPO	^
			SHIELA KAMDON	\sim

Start by finding the Supervisor Text field. The *Work Order* filter has this field on Pg. 5. Note that 'Supervisor' refers to the employee's CODE, while 'Supervisor Text' refers to the NAME. This is the case for all Code/Type fields (white + grey field). Set the drop down list next to Supervisor Text to 'equal'. When you do, the Supervisors will be listed in the box to the right. Use the up and down arrow to scroll to the entry you want (or, you can click on one entry, hit the first letter, "S", and you'll jump to the "S's" in the list).

Find your choice and click it. It will be highlighted in blue. This reads like a formula: Supervisor Text = Shane Harpo.

Count Records

Count Records

Click the Count Records button to get a count on the records that will be filtered out. Here we can see that 128 (out of the total 5058) Work Order records have Shane Harpo named as Supervisor.

Record Count	×
Total number of records: Number of records after current filter:	5058 128
ОК	

Go to Records

Go Now click "Go" on the filter screen and the 128 Work Orders with Shane Harpo named as a supervisor will be shown. You can see the record count at the bottom of the screen (in the status bar).

🖼 Work Ord	ders - Unnamed Filter Set
	<u>¾ ◀ ◀ ▶ ▶ ⇒ ୬ ፼ 명 盟 ● Q - ⊘ - ≤</u>
Work Order # 2011-00075	Category 02000 Call Center
Status 999 Complete	Problem CSINFOPRT Info - Block Party
Status Date 08/09/2011 💌 03:20 PM	Main Task
W0 Location Assets List/Events Tasks/Res Routing	Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments
Asset Location 2075 E BROOKS ST	Comment From Request
Cause	
Supervisor 140 SHANE HARPO	Assigned By
Lead Worker	Assigned Date 1 / / 💌 : AM Problem
Priority 📕	Start Date 🚺 08/09/2011 💌 : AM Overdue 🗔
Account #	End Date 🚺 08/09/2011 💌 : AM Lead Worker 🗆
Proj No - Acct	Task 🗆
Project Text	Master Project ID Supervisor
Reason	Name Hard Lock W0
	Record 1 of 128 View Mode Ready

To see a list of the records, use the Locate Button 🖳 You'll see the filtered record set only (the 128 records found in your filter).

Filter with 'In List' (Statuses)

Next, let's filter out the old Work Orders that are completed or cancelled, leaving only current work. You'll need to filter out all the Statuses indicating the Work Order is finished. Return to your filter form and find Status Text on

Pg. 3. Instead of 'equal', which allows it to be equal to only one value, select 'in list', which allows you to choose several matching values.

New Work Order	Status Text	in list	•	In Service Bay Missing Required Data New Work Order	~
----------------	-------------	---------	---	---	---

Hold down the CTRL or SHIFT keys and click to highlight each status indicating a current Work Order. The filter statement you're building reads something like this:

"I want Work Orders where <u>Status Text</u> is in this list:

✓ Missing Required Data

- ✓ New Work Order
- ✓ Open WO ... etc..."

Click 'Count Records' again - all current Work Orders. Click 'Go' to open the records, and 'Locate' to see a list.

Save the Filter

Filters can be saved for use in the future. To save a filter, select the "Save" button if it is the first time you have saved the filter or "Save As" button on the Filter screen. The saved filters will appear on the filter window. Filters saved with by the current Lucity user will also appear in the drop-down

list next to the filter button

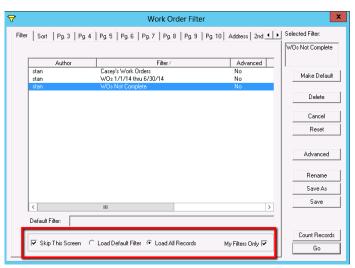
Filter Display Options

The selection buttons at the bottom of the "Saved Filters" list allow you to choose to display only your own saved filters and indicate whether or not a default filter will be used each time a module is opened. Note: Default filters are workstation specific.

- 1. When you select the "Skip this Screen" option, the filter form will not appear each time the module is opened. Instead, the system will open the module directly to the record set. If needed, you can still open the filter from the module toolbar.
- 2. When the "Load Default Filter" option is selected, the system runs the filter marked as default each time the module is opened. The default filter will be listed at the bottom of the screen.

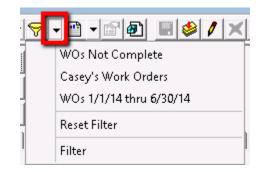
To change the default filter, highlight a different filter name in the saved filters grid and click the Make Default button on the righthand side of the filter screen.

- 3. When the "Load All Records" option is selected, the system will display all records each time the module is opened.
- 4. When the "My Filters Only" option is selected, the saved filters grid will display only the filters saved using your Lucity login ID. If this option is not selected, all saved filters, including those saved by other Lucity users, will appear in the grid.



Resetting a Filter

After running a filter, you can reset the records in the module back to the full list by selecting "Reset Filter" located in the Filter drop-down list.



Advanced Filters

If you find that one of our standard filters does not provide the necessary results, you can use an advanced filter. Advanced filters are particularly useful if you want to query for null values or include 'or' statements in your query. In the following step-by-step examples, we'll show you how to create some of the simplest forms of advanced filters.

Keep in mind that for more advanced types of filters it's very important that you have knowledge of SQL syntax to create your queries. Also, you should know that the filter syntax differs depending on which database you are using (Oracle, SQL Server, or Access). Finally, reports won't run properly with advanced filters. You'll need to define the Report SQL in order to use advanced filters in your reports. For additional information on our advanced filters, please consult our Lucity help guide or talk to your database administrator for help writing SQL queries.

Filtering for Null Values

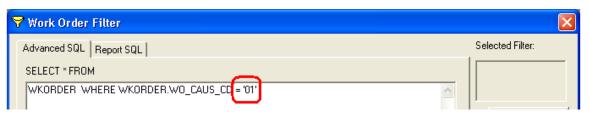
In our first example, we'll show you how to create a filter for a null value. In other words, we'll show you how to filter for a blank field. The easiest way to create this type of advanced filter is to start with a standard filter.

- First, select a field to filter on. We'll use the Cause field in Work Orders.
- 2. Select 'equal' from the dropdown list. Then, highlight any value in the next field. It doesn't matter which one you select as we'll be deleting it in the next step.
- 3. Click the Advanced button.

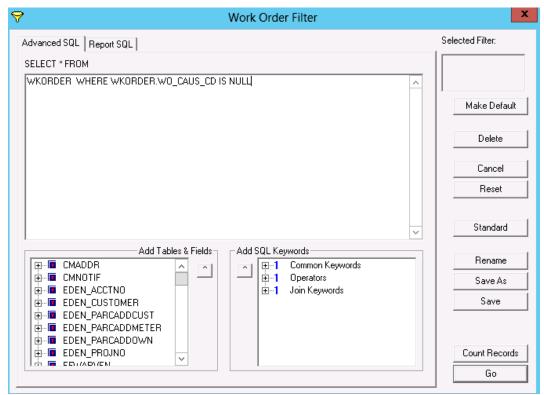
Filter Sort Pg. 3	Pg. 4 Pg. 5 Pg. 6	Pg. 7 Pg. 8 Pg. 9 Pg. 10 Address 2nd 💶	Selected Filter:
Problem Text	<none></none>		
			Make Default
Cause	equal		
		02 03	Delete
Cause Text	<none></none>		Cancel
		✓	Reset
Main Task	<none></none>		
		×	Advanced
Main Task Text	<none></none>		
	,	×	Rename
Assigned Crew	<none></none>		Save As
	,		Save
Assigned Crew Text	<none></none>		Add Records
			Count Records

Notes:___

4. In the Advanced SQL window, delete the = sign and anything after it. Here, we'll delete the = sign and '01'.



- 5. Next, type **IS NULL** where you made the deletion.
- 6. Click GO to see your filtered set. This particular record set will contain any records where the Cause field is null (blank).



Notes:_

Filtering Using 'OR' Statements

Now, we'll show you how to alter a standard filter to include an 'or' statement. This is another kind of advanced filter that's really quite simple to use. For example, you may want to use this type of advanced filter to find all Work Orders where you are listed as either a Lead Worker or a Supervisor.

- 1. On Pg. 5 of the filter screen, set the Supervisor Text and Lead Worker Text equal to your name. Here, we've selected Nicole Schmidt.
- 2. As the filter appears initially, it will return all records where both the supervisor AND lead worker are Nicole Schmidt. Since we want to return records where she is listed in either capacity (not both), we'll use an advanced filter. Click the *Advanced* button.

♥ Work Order Filter	X
Filter Sort Pg. 3 Pg. 4 Pg. 5 Pg. 6 Pg. 7 Pg. 8 Pg. 9 Pg. 10 Address 2nd 🕨 🕨	Selected Filter:
Supervisor	
Supervisor Text equal VICK CAR	Make Default
Supervisor Lexit equal NICK CAR Nicole Schmidt NORMAN MICKEY	Delete
Lead Worker	Cancel
	Reset
Lead Worker Text equal Image: Additional and the second department of the seco	Advanced
Priority Priority Text	Rename
Priority Text	Save As
Account #	Save
Proj No - Acct	Count Records
	Go

4	Work Order Filter	
	Advanced SQL Report SQL	S
	SELECT * FROM	Γ
	WKORDER WHERE WKORDER.WO_SUPR_TY = 'Nicole Schmidt' AND WKORDER.WO_EMP_TY A = 'Nicole Schmidt'	
:		

3. On the Advanced SQL tab, delete the word AND and type OR in its place.

4. Add parentheses around the new query: WKORDER WHERE (WKORDER.WO_SUPR_TY = 'Nicole Schmidt' OR WKORDER.WO_EMP_TY = 'Nicole Schmidt')

Work Order Filter	X
Advanced SQL Report SQL SELECT * FROM WKORDER WHERE (WKORDER.WO_SUPR_TY = 'Nicole Schmidt' OR WKORDER.WO_EMP_TY = 'Nicole Schmidt')	Selected Filter:

5. You can then click the *GO* button to access the filtered set. This filter will now return all records where Nicole Schmidt is listed as either the Supervisor OR the Lead Worker.

Filters for 'In List" Numbers

The final type of advanced filter that we'll demonstrate is a filter for numbers in a list. Remember, earlier in this workbook we discussed filters for 'in list' statuses. That kind of filter allowed you to select multiple values from a pick list; however, certain fields in the filter form don't provide pick lists. These include fields like Work Order and Request Numbers. To search for multiple Work Order Numbers in a list, complete the steps below:

- 1. On Pg. 3 of the filter window, select 'in list' from the drop-down menu beside Work Order #.
- 2. In the field to the right, type your first Work Order Number as it appears in the *Work Orders* module. Then press the <Enter> key. Your cursor will move to the next line allowing you to add an additional number. You can continue to add as many numbers as you wish.
- 3. Click *GO* to view the filtered set. In this example, our filter will return the three work orders numbered 2014-00010, 2014-00011, and 00012.

💎 Work Order Filt	er				X
Filter Sort F	⁹ g. 3 Pg. 4 Pg. 5	5 Pg. 6 Pg. 7 Pg	. 8 Pg. 9 Pg. 10 A	ddress 2nd 💶 🕨	Selected Filter:
Work Order #	in list	 ✓ 2014-0001 2014-0001 2014-0001 	1		Make Default
Status	<none></none>	-		•	Make Delauk
Status Text	<none></none>		*		Delete
Status Date	<none></none>	• 77	v v		Cancel Reset
Status Time	<none></none>	▼ : AM			Advanced
Category	<none></none>	•	*		Rename
Category Text	<none></none>	_	*		Save As Save
Problem	<none></none>		* A		Count Records
			Ŧ		Go

Reports

Reports are a convenient way to view and organize data. The desktop application contains a set of pre-defined reports in each module. These reports can be modified using Crystal Reports^M software. You can also create your own custom reports using Crystal Reports. The following example is from the *Work* module; however, these same steps apply in all other modules.

A supervisor may need a report documenting which work orders have been worked on by each employee. Our system contains a pre-defined report with just this information (the Employee Usage Detail report).

- 1. To access the report, click 🛄 on the module toolbar.
- 2. The names of all pre-defined reports are listed in the Reports dialog box. Scroll down to find the report you are looking for.
- 3. The Report Description box at the bottom of the screen will display a brief summary of the highlighted report.

	Dialog		
	Reports:		- Report Filter
		Aging Work Order Report	Report Filter
	S	Completed Work Order Summary	This Record Only
	S	Contractor Usage Detail Report	C Current Filter
	💽 🍋	Contractor Usage Summary Report	C All Becords
	.	Crew Assignment Report	Airriccolds
	.	Employee Hours by Equipment Summary Report	
	-	Employee Usage Detail	View Report
	.	Employee Usage Summary Report	Print Report
	.	Equipment Hours by Employee Summary Report	
	.	Equipment Usage Detail Report	Export Report
	.	Equipment Usage Summary Report	
	L	_Eluirli Isane, Detail Bennit	Add
	Report De	scription.	
	Details all	Work Order Information each employee has been 📈 👘	Edit
ľ	associate		Delete
			Properties
	Report File	Path:	
	\\GBAMS	-DEV-01\T\Reports\Install\Work\W0emplst.rpt	Close

Report Filter

Note the Report Filter box in the upper-right corner. This feature allows you to choose which records will be included in the report.

💾 Dialog			
Reports:			Report Filter
3 3 3 5 4 5	Aging Work Order Report Completed Work Order Summary Contractor Usage Detail Report Contractor Usage Summary Report	$\left(\right)$	This Record Only Current Filter
	Crew Assignment Report Employee Hours by Equipment Summary Report Employee Usage Detail		C All Records
	Employee Usage Summary Report Equipment Hours by Employee Summary Report Equipment Usage Detail Report		Print Report Export Report
Report De	Equipment Usage Summary Report _EluirU Isane_DetailBennut		Add
	scription. I Work Order Information each employee has been	1	Edit
associate			Delete
			Properties
Report File	e Path:		
\\GBAM	6-DEV-01\T\Reports\Install\Work\W0emplst.rpt		Close

Note the Report Filter box in the upper-right corner. This feature allows you to choose which records will be included in the report.

- 7. If you select "This Record Only", the report will only include the information on the current record.
- 8. If you select "Current Filter", the report will include all records in the current filtered set.
- 9. If you select "All Records", the report will include all records in the module.

Notes:____

Quick Reports

You may have some reports that are used more frequently than others. You can save these reports as "Quick Reports". This feature allows you to select and generate a report quickly, without having to open the entire Report List. Quick reports are now Lucity user ID specific; therefore, the Quick Report list will display only the reports you have saved.

- 1. Click 🛄 on the module toolbar to open the report list.
- 2. Right click on the report you wish to save as a "Quick Report" (default report).
- 3. Select Add to Quick Reports, with the option to save it on this record only, the filtered data set, or the all the records.

	View Report Print Report Export Report	
T	Add Edit Delete	
	Properties	
	Add to Quick Reports - This Rec Only	
	Add to Quick Reports - Filtered	
	Add to Quick Reports - All Records	
	Remove from Quick Reports	

4. Once a report is saved as a Quick Report, a pointing hand will appear in front of the report name. Quick Reports will appear in the list when you click the drop-down arrow beside the toolbar button.

•)
Cor	, tractor Usage Summary Report
Emp	oloyee Usage Detail
Rep	orts

Notes:____

Browse



The Browse feature is used for reporting on-demand. It allows you to quickly generate a report in table format. The following example is from the Work Orders module; however, these same steps apply in all other modules.

- To access the Browse function, click on the module toolbar.
 Using the Browse dialog box, you can select a series of fields from the grid on the left and add them to the grid on the right. This allows you to build a report for all of your records showing only the information you are interested in seeing.

10. Highlight a field in the left-hand grid.

Add ->

11.Click the button to move it to the right-hand grid.

12. Continue adding additional fields as necessary.

🙀 Browse				
Status Status Text Status Date Status Time Category Category Text Main Task		Add -> <- Remove	Work Order # Problem Problem Text Cause Cause Text	
Main Task Text Assigned Crew Assigned Crew Text Supervisor Supervisor Text Lead Worker	~	Add All >> <td></td> <td></td>		
Show Mine	C Show All			
Browse A	Global	Author	Save	Reorder
			Rename	Delete
			Reset	Browse Last
		>	Go	Cancel

Browse Report

Once you have selected the fields for your Browse, click **Go** to view the Browse report.

1 1 1 1 1 1 1 1 1 1 	<u> </u>			
Work Order #	Problem	Problem Text	Cause	
2007-00938			02	Non-Schedu
2007-00939			03	Preventative
2007-00940	WTMMTLK	Leaking Meter		
2007-00941	WTMMTOOR	On / Off for Repairs		
2007-00942	WTMMTOOR	On / Off for Repairs		
2007-00943	WTMMTOOR	On / Off for Repairs		
2007-00944				
2007-00945			02	Non-Schedu
2007-00946				
2007-00947			03	Preventative
2007-00948			02	Non-Schedu
2007-00949			02	Non-Schedu
2007-00950	STSLOUTAP	Street Light Out - APS		
2007-00951	STSLOUTAP	Street Light Out - APS		
2007-00952	STSLOUTAP	Street Light Out - APS		
2007-00953	STSLOUTAP	Street Light Out - APS		
2007-00954	STSLOUTSR	Street Light Out - SRP		
2007-00955	STSLOUTAP	Street Light Out - APS		
2007-00956	STSLOUTAP	Street Light Out - APS		

In the example above, we've selected Work Order #, Problem, Problem Text, Cause, and Cause Text. As you can see, the Browse report displays only the selected information.

Saving a Browse

If this is a Browse report you would like to use frequently, you can save it to your Browse list.

- 1. Click the Save button.
- 2. Enter a name for the Browse in the field provided.
 - Here, we've named the Browse "Problem/Cause".
- 3. Once the Browse has been saved, the name will appear in the grid at the bottom left-hand corner of the dialog.

🙀 Browse		×
Status Status Text Status Date Status Time Category Category Text Main Task Text	Add > Work Drder # Problem Text Cause Text	
Assigned Crew Assigned Crew Supervisor Supervisor Text Lead Worker	Browse Save Please enter the name for the browse Problem/Cause	
Show Mine	Save Cancel	
Browse	Global Author Save Reorder	
	Rename Delete	
	Reset Browse Last	
<	Go Cancel	

Quick Browse

After saving a Browse, you can access it through the Quick Browse list in the menu. All Quick Browses appear in the list when you click the drop-down arrow beside the toolbar button.



Notes:___

Browse				
Status Time Category Category Text Cause Text Main Task Main Task Text Assigned Crew		Add -> <- Remove	Work Order # Status Status Text Problem Problem Text Cause	
Assigned Crew Text Supervisor Supervisor Text Lead Worker Lead Worker Text Priority	×	Add All >> << Remove All		
Show Mine	C Show All			
Browse / Problem/Cause	Global No Lu	Author [Save	Reorder
			Rename	Delete
		_	Reset	Browse Last

Document Control



The document control feature allows you to add or delete documents, videos, images, and URLs to/from the record that you are on.

• It is important to remember that when adding documents on the desktop, the document is only linked to the asset in Lucity. If the document is deleted from your computer, it will no longer be accessible from the Lucity system. In addition, if the document is on your computer and not available to the network, other users will see that it is attached, but will not be able to view it.

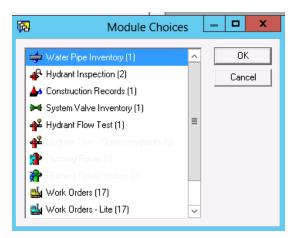
To add a document, click the Add button and complete the dialog that appears:

Document Control	x	
	Add	
	Info	
	Open	
Add Document		x
Web Page File Path: File Type: Description:		
	Save	Cancel
	Close	

Relationship Button

The *Lucity* systems rely on the integration of modules to efficiently record and analyze data. For example, the Hydrant Inventory module stores the Valve associated with a record. It also shows stores information about its inspections. Thereby, the hydrant, valve, and inspections are related. The Relationship Button displays any relationships of the current record to records in other modules. Next to each relationship name is a count of the number of related records. Here's a picture of some relationships to a Hydrant Inventory record:

Clicking on one of the relationships will open the related record(s) in the other module.



Create Work Order

e.

The Create Work order Button allows users to create new work order records directly from assets, inspections or work requests. This tool on the desktop can either create a work order(s) for the current record or the entire filterset. It can also create a work order based on a work order template. When you click the Work Order button, a dialog similar to the following will appear that is from the Hydrant Inventory module and lists several existing templates:

-			
ei	Create Work Or	der	×
	Based On		
	Current Record	d O Entire Filtered Recordset	
	Select Template		
	PM/Template	PM/Template Text	
	WTDHYFT	Hydrant Flow Test	
	WTDHYRPR	Hydrant Repair	
	WTDHYM	Hydrant Maintenance	
	WTDHYP	Hydrant Painting	
	WTDHYRPL	Hydrant Replace	
	WTDHYINS	Hydrant Install	
		OK Cancel	

Toolkit

Some modules have a Toolkit button that has provides users with functions designed for

specifically that module. When the dialog opens, you can select a tool that you wish to execute. For example, the Work Order module has this toolkit:

Sometimes, another dialog will appear after selecting a tool that requests more information. For example, the "Change Crew for Filterset" toolkit will show a dialog similar to the following that allows you to select a new crew:

The help file is a good resource for providing detailed information about the toolkits.

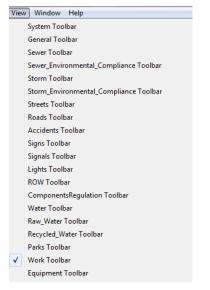
Toolkit Calculate Per Asset WD Cost Change Crew for Filterset Change Lead Worker for Filterset Change Supervisor for Filterset Change WO Status for Filterset Close Work Order for Filterset Create Linked PO Create Overflow Create Work Order From Template	Execute Close
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Crew▲ PKOps	Parks Operations	Crew Text	
WTMRG			
	Vanessa Jirrels		

Customizing Toolbars

The desktop allows users to select toolbars to display and customize. This allows them to remove modules that they don't use, or arrange them to match their work flow.

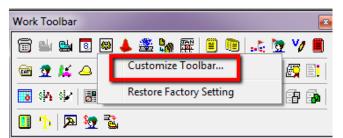
The display a toolbar, select one or more toolbars in the View menu:



After selecting the toolbar, it will first display at the top of the desktop. It can be moved to a different location on the screen by clicking on the bar at the far left end and dragging it to a new position:



To customize the toolbar, right-click on it and select "Customize Toolbar":



Module buttons can be added, removed, moved up/down, and separated by a Separator by using the buttons in the Customize Toolbar dialog:

Customize Toolbar				×
Available toolbar buttons:		Current toolbar buttons:		Close
Separator	*	Requests		Reset
	Add ->	Work Orders Lite		Help
	<- Remove			
		 Daily Work Inspection Water Loss 		Move Up
	Ŧ	RM/Work Template	Ŧ	Move Down
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Help File

The Lucity Help File is a very useful tool for finding out more information on any topic within the Lucity system. To access the help file from the desktop, you can go to the Help menu and select "Help Topics". The help file requires an internet connection.

You can run custom searches using any search criteria. For example, to find information about "Work Orders" on the desktop, click on the Lucity Desktop manual, type in "Work Orders" in the search field and click the magnifying glass to search for the related help topics. You can click the links on the left side to view a topic related to Work Orders:

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IA32 result(s) found IA32 result(s) found (0.345) seconds The (Marris Packy shown creating additional functions such a score shown addition of the score shown	₫ ▲ ▼				🖙 🤿 🚔 work orders 🖉 🗖 Match partial words
(0.343) seconds Image: Contraining specific data regarding the problem, the affected assets, the needed resources, and the involved tatk takes the following specific data regarding the problem, the affected assets, the needed resources, and the involved tatk takes the following specific data regarding the problem, the affected assets, the needed resources, and the involved tatk takes the following specific data regarding the problem, the affected assets, the needed resources, and the involved tatk takes the following specific data regarding the problem, the affected assets, the needed resources, and the involved tatk takes the contraining additional following specific data regarding the problem, the affected assets, the needed resources, and the involved tatk takes the contraining additional following specific data regarding the problem, the affected assets, the needed resources, and the involved takes the contraining additional following following. Future data entry, Daily God is the smallest of the three and was designed for easy, but the too the affected assets, future data entry, Daily God is the smallest of the three and was designed for easy, but the too take and was designed for easy, but the too take and was designed for easy, but the too take and was designed for easy, but the too take and was designed for easy, but the too take and take too take and take too take take take take take take take take	Search	«	Work > Work Orders		
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Wink Confers Daily Work Confers Benuests Mailer about down word word word word word word word word					
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You can also drill down on the Contents menu to find detailed information on a specific topic or module:

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<u>Contents</u>	Welcome	
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