+lucity™

TRAINING GUIDE

Basic Functionality - Desktop

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.

Table of Contents

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.

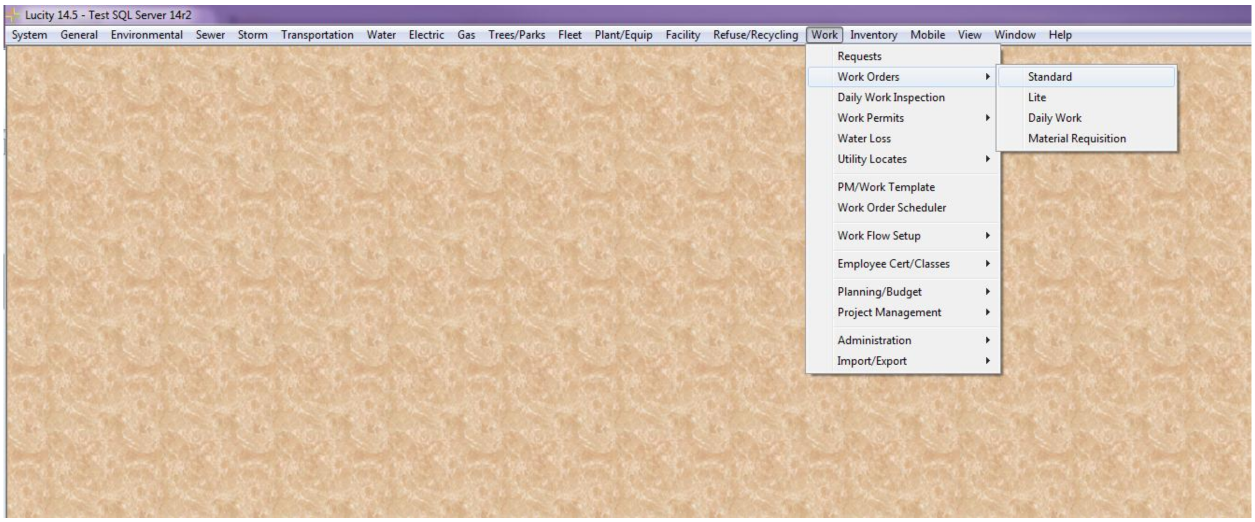
Mobile Desktop

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*™ desktop suite. After logging into the system, you'll see a menu bar at the top of the screen:

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*.



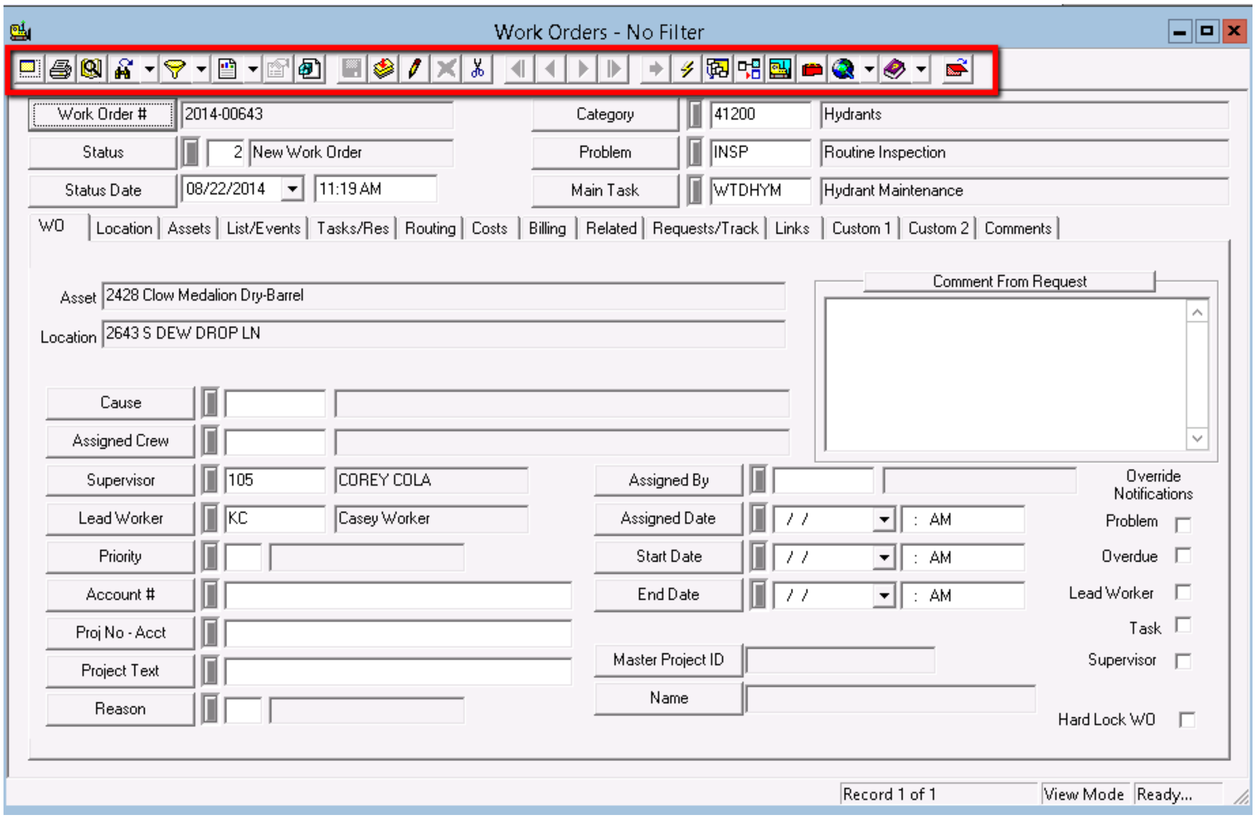
Although the menu bar contains all of the capabilities and programs offered by Lucity, only those purchased will be accessible. If you click on a program that you have not purchased, a drop-down menu will appear; however, the menu items will be disabled (grayed out).

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

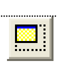
At the top of each window, you'll see a Module Toolbar.



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.

Toolbar Buttons

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

	Filter	Opens the Filter window.
	Reports	Views, prints, or adds/deletes reports to or from the list of pre-defined reports.
	Open Document	Views a list of documents, videos, and images attached to the record.
	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.
	Add Record	Adds a new record to the module.
	Edit	Edits the current record.
	Delete	Deletes the current record.
	First, Previous, Next, Last	Navigates through the data set.
	Go To	Views a specific record number.
	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).
	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.
	Show In Map	Opens GIS, zooms in, and highlights the selected feature.
	Recalculate	Updates all calculations in the module.
	Help	Opens the Lucity Help Guide to the appropriate topic chapter.
	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 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.

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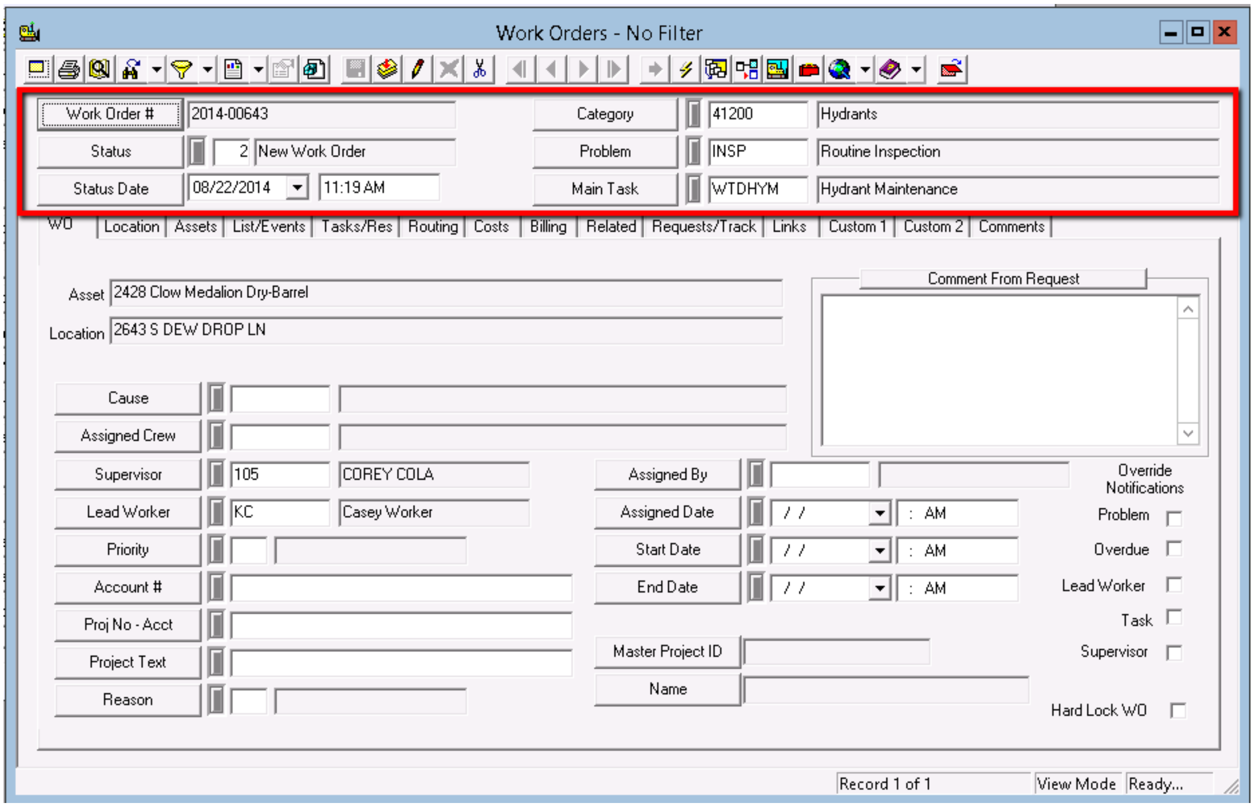
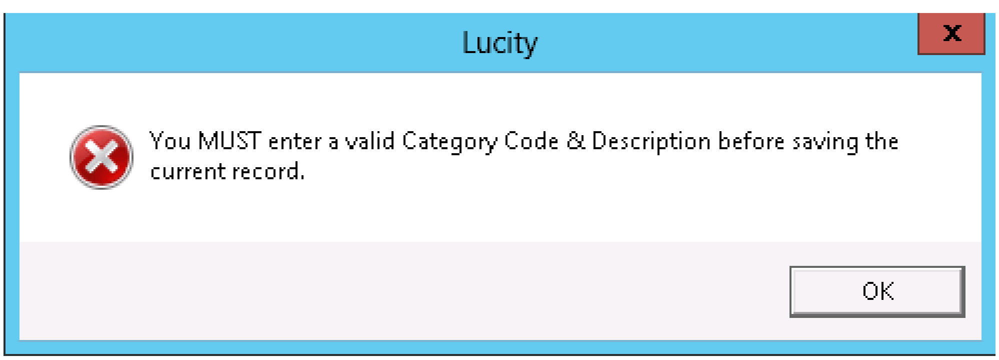
Header Data

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.



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.

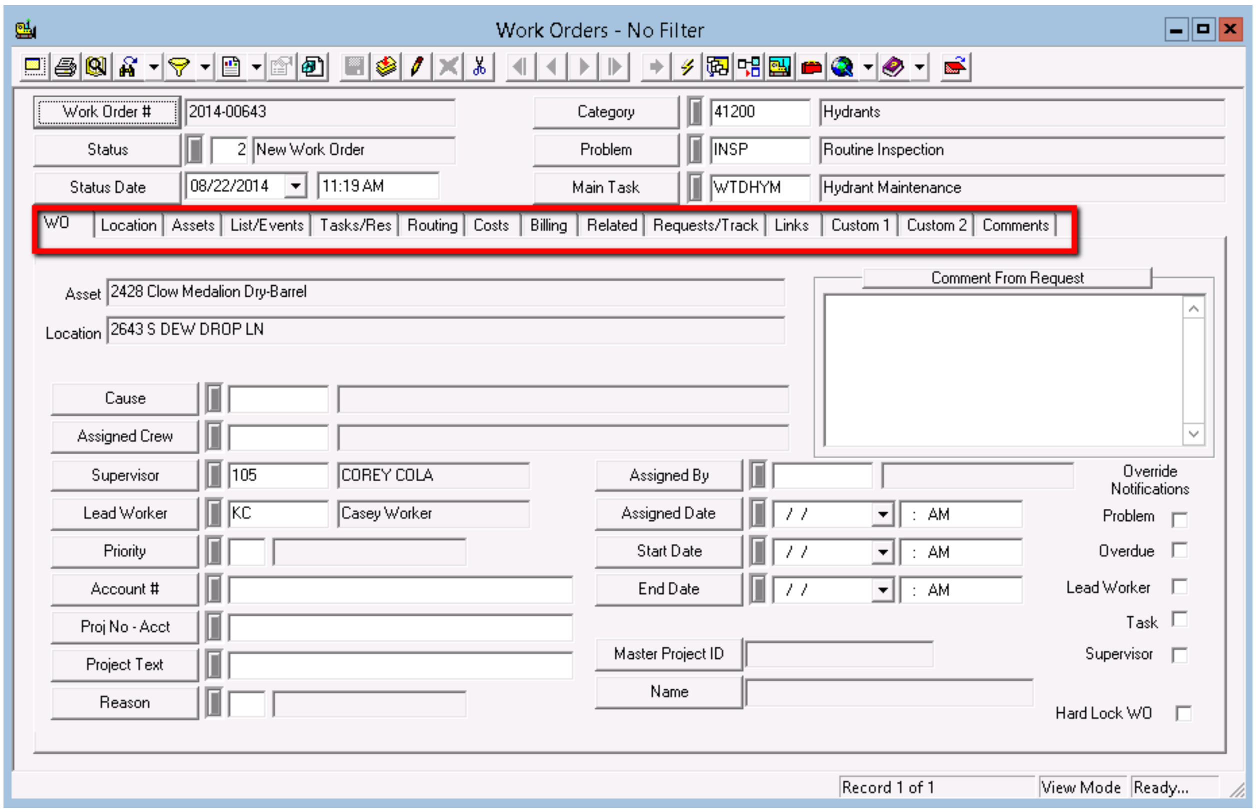
For example, here's a message that will appear in Work Orders if the fields required by the system aren't filled out upon saving:



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

Tabs

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.



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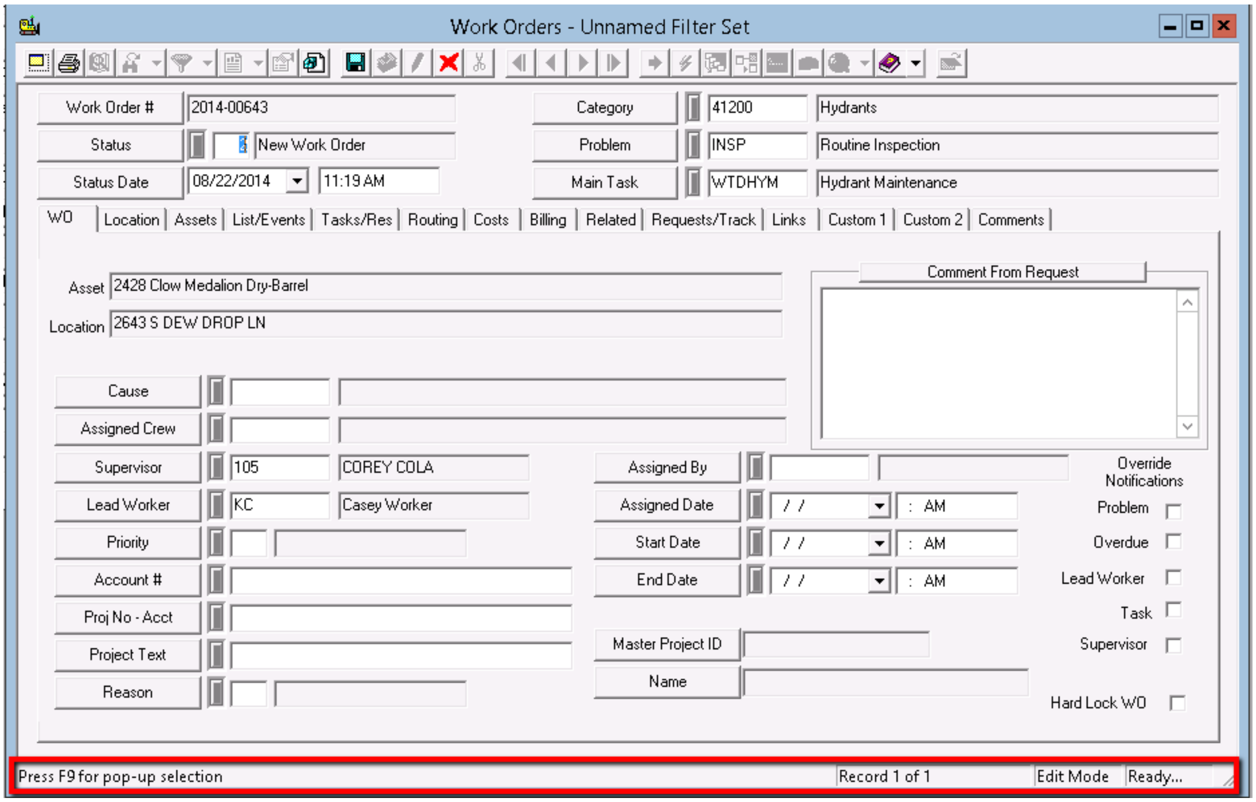
Status Bar

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”:



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:

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

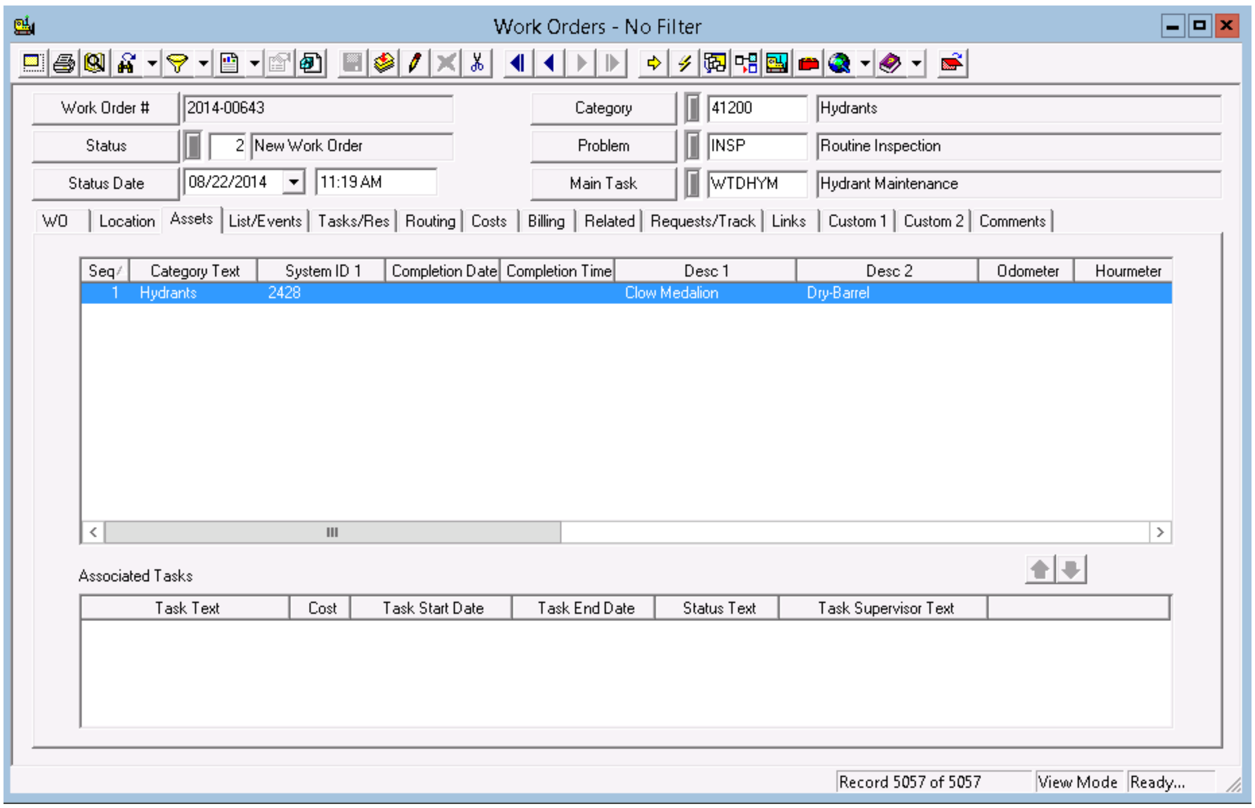
The status bar also allows you to see whether the current record is in View Mode, Add Mode, or Edit Mode. For example, this record is in Edit Mode. The status bar may also display any messages regarding available Hot Keys or other special functions. The status bar above tells you that by pressing the <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.



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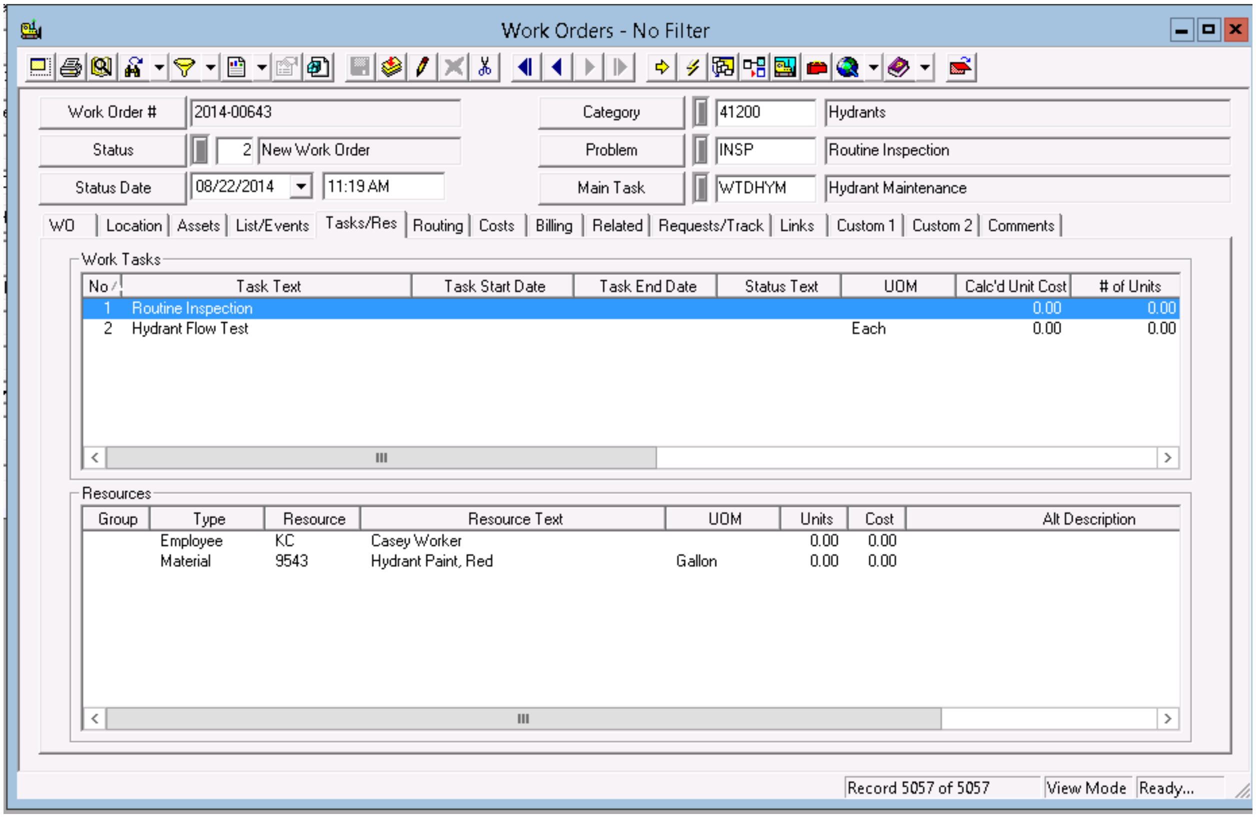
Occasionally, a grid inside of a module can contain parent records to a child grid beneath it. Clicking on one of the parent records will display only its children in the grid beneath it. For example, the WO Tasks are a "parent" of the Resources and the Resources are considered "children" of the WO Tasks.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



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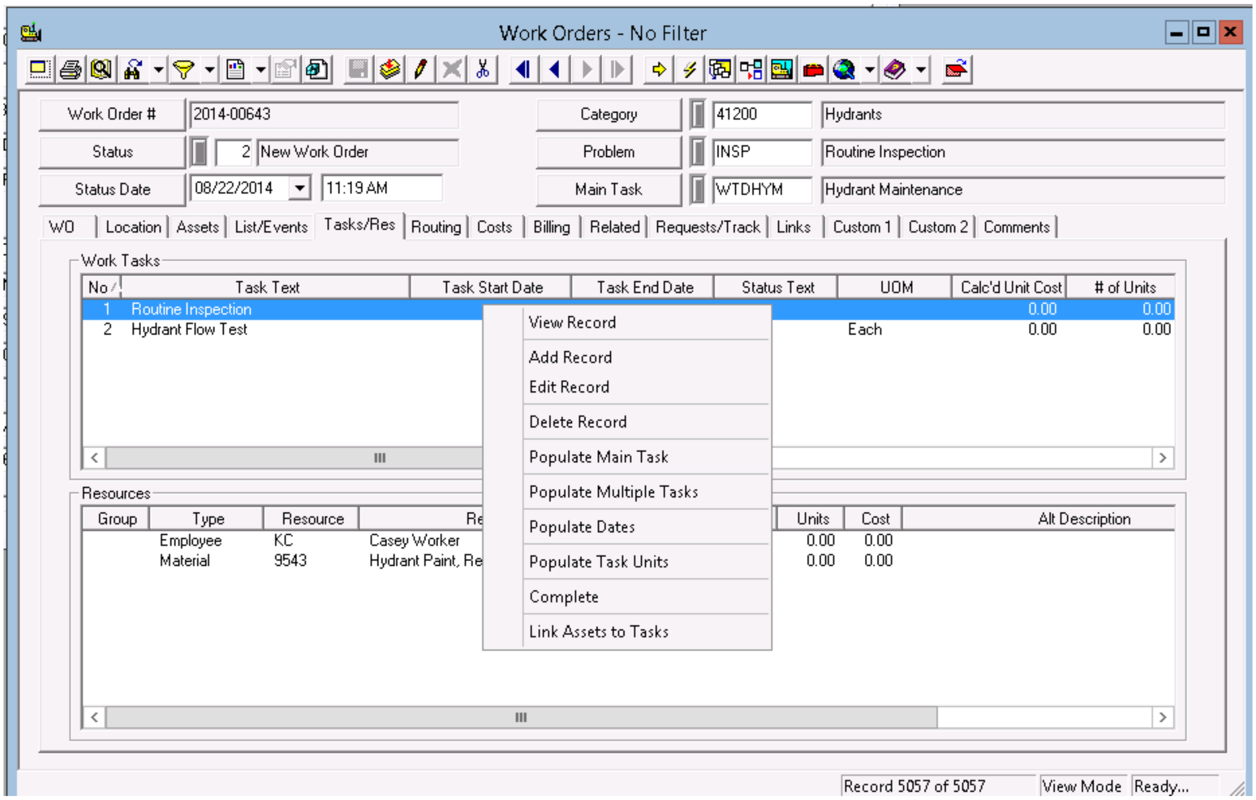
Grid Functions

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:

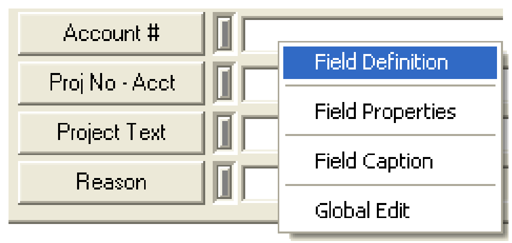


Fields and Field Captions

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.

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**.



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.

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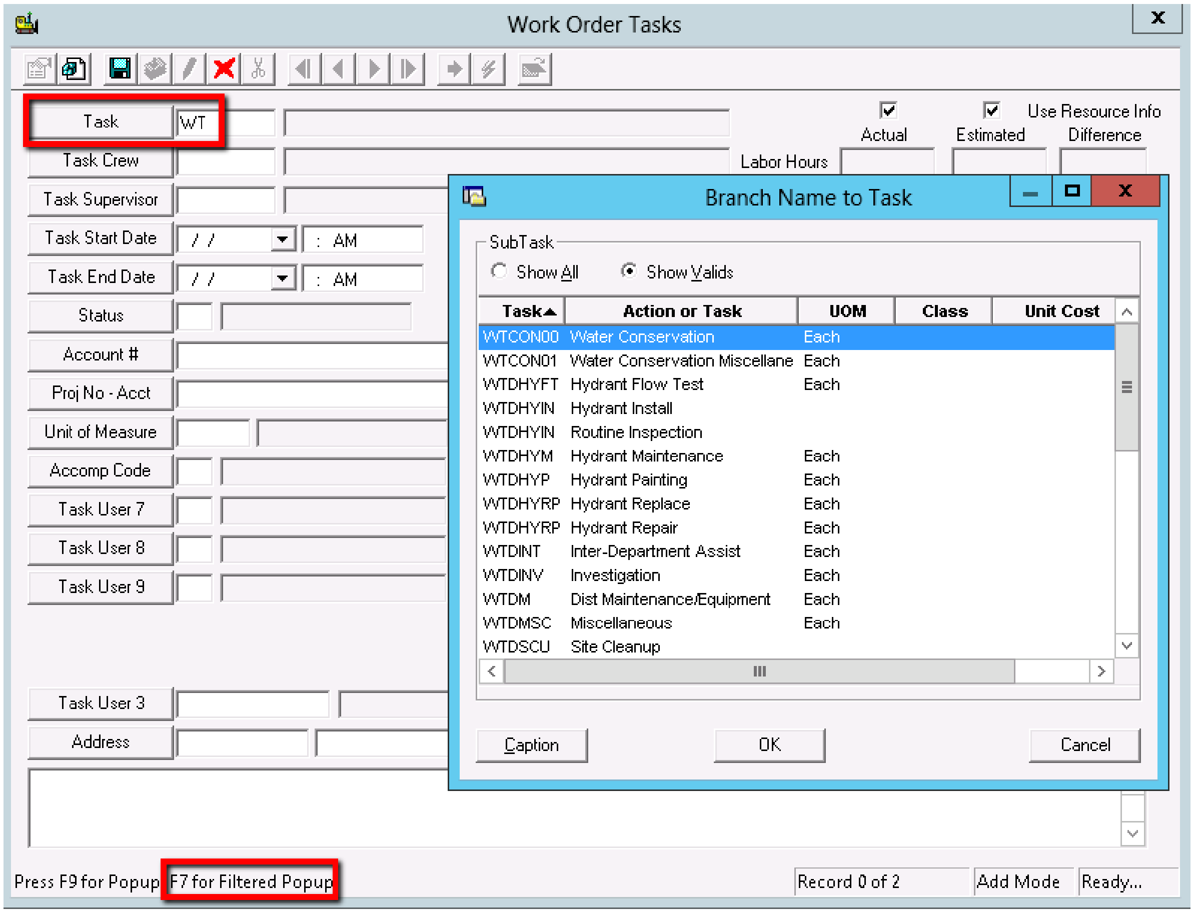
Field Instructions

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':

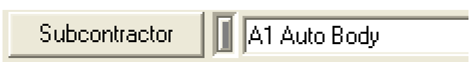
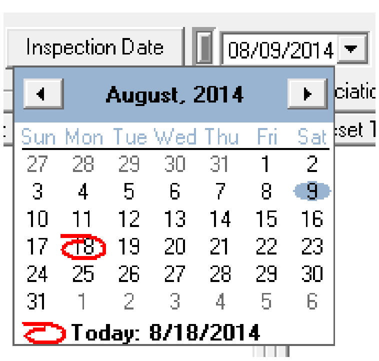


Here are some examples of fields that use the F5 key to copy a value from one field to another:

- 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.

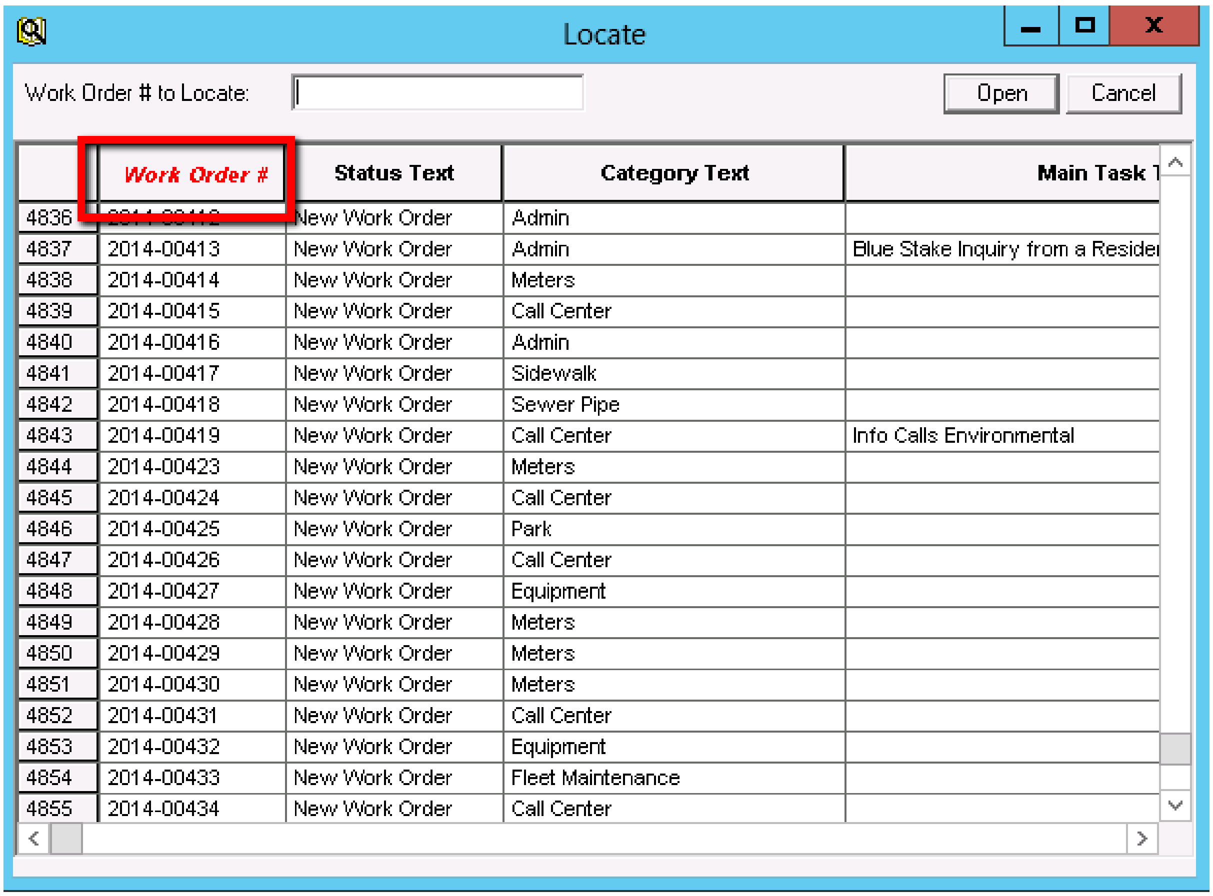
Code-Description or "Picklist" Fields 	These fields require you to enter a code in the first box. The code description will then appear in the grayed-out box. For example, a code might be 1=High, 2=Medium, 3=Low, etc. The number 1 would go in the first field and the description "High" would automatically appear in the second field. The codes and descriptions are created and then accessed through a picklist.
Numeric Fields 	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.
Text Fields 	Text fields allow both letters and numbers to be entered. Most text fields are left-justified.
Logical (checkbox) Fields 	Logical fields allow you to enter a checkmark in the box if you wish to select that field.
Date Fields 	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 	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

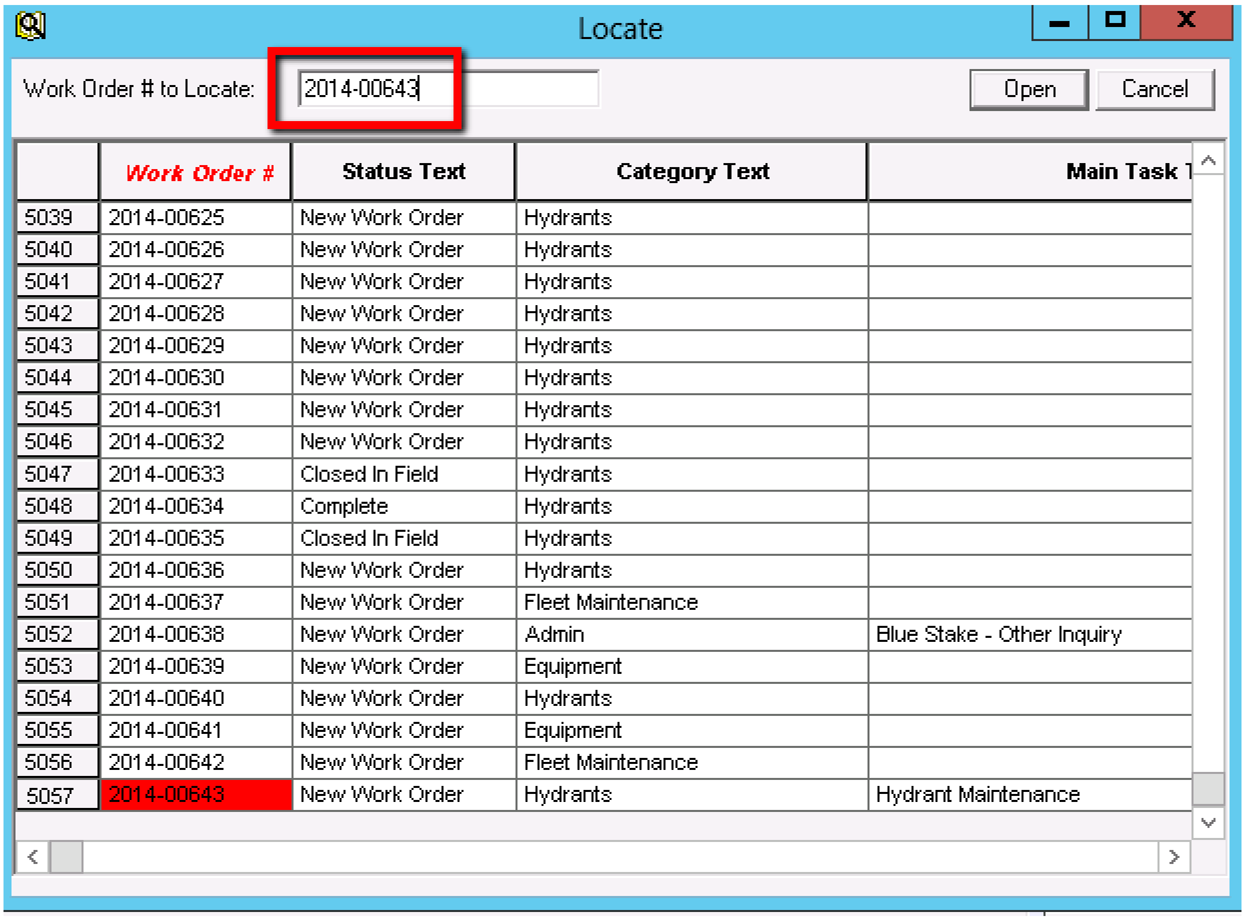
The locate feature allows you to quickly find specific records within the current record set. The following example is from the *Work Orders* module; however these same steps apply in all other modules. You can use this feature if you know specific identification information about the record you are 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.



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.



	Work Order #	Status Text	Category Text	Main Task T
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.

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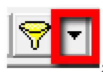
Filtering Records

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.

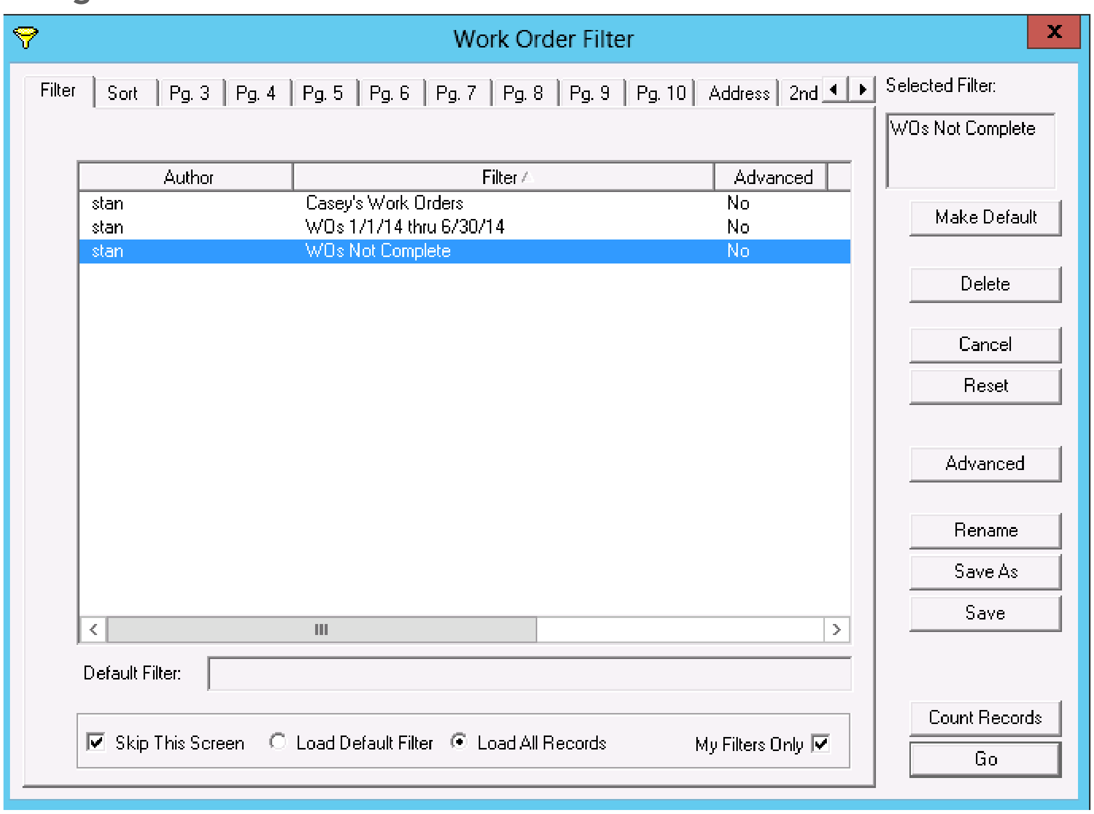
Once you're comfortable with filtering, you'll be able to use filters to get a great deal of specialized information out of the system. You can find assets that are costing you the most in maintenance, do cost and trend analyses, and much more.

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 .
3. In the Filter drop-down list , you can select the "Filter" option.

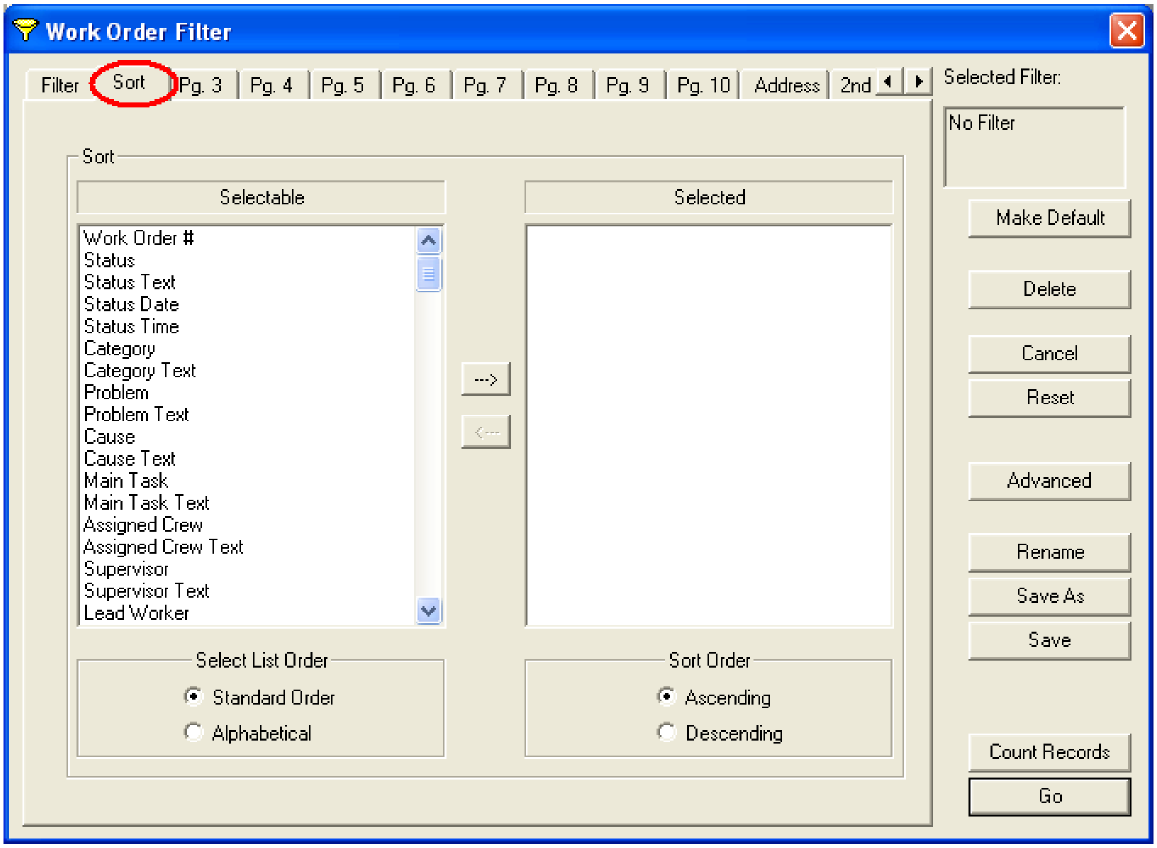
Using the Filter Window



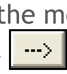
Filter

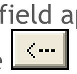
The “Filter” option is the first tab in the Filter window. This tab contains a list of saved filters. If this is your first time using the module, no filters will be saved.

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:

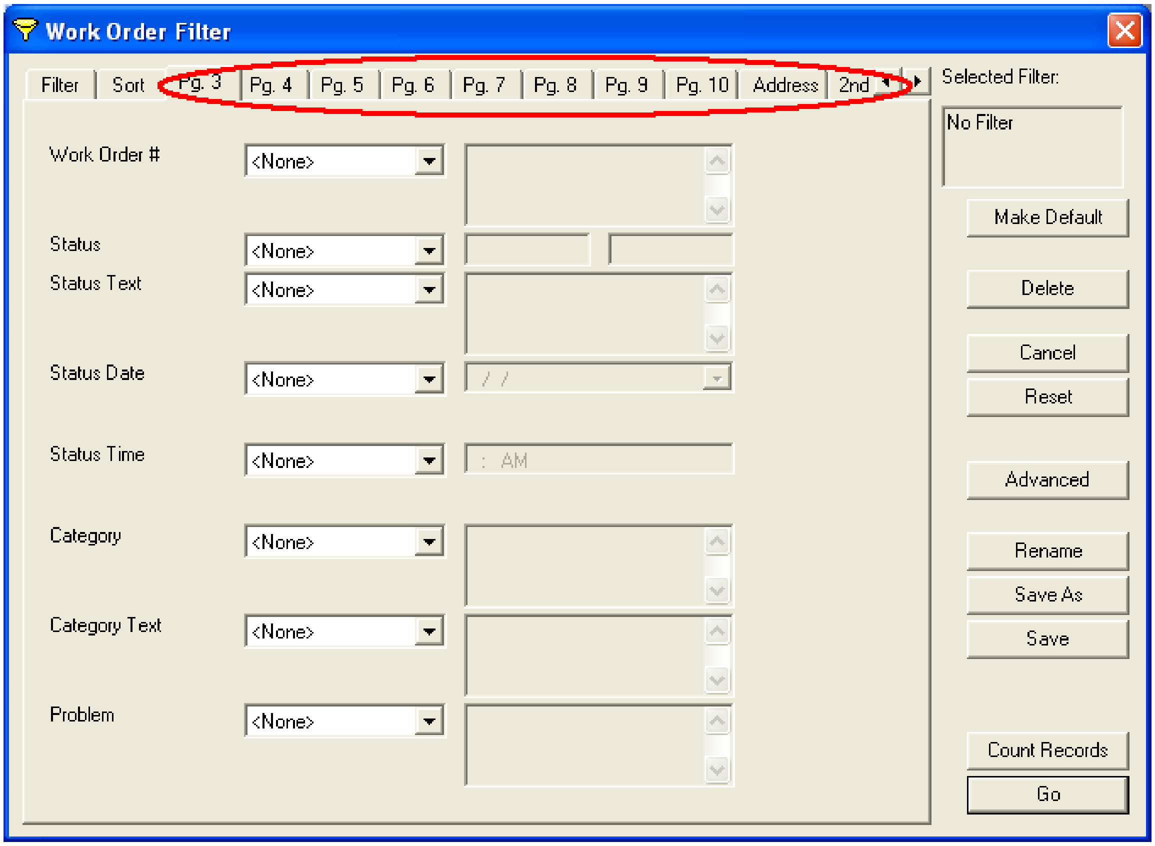
1. Highlight a field in the “Selectable” list. You can use the selection buttons at the bottom of the grid to change the order in which the fields appear. “Standard Order” reflects the order in which the fields appear in the module itself. If you’d prefer, you can change it to “Alphabetical” order.
2. Click the right arrow 

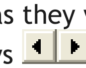
and the field appears in the “Selected” list. You can select as many fields as you like from the list. Use 

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.



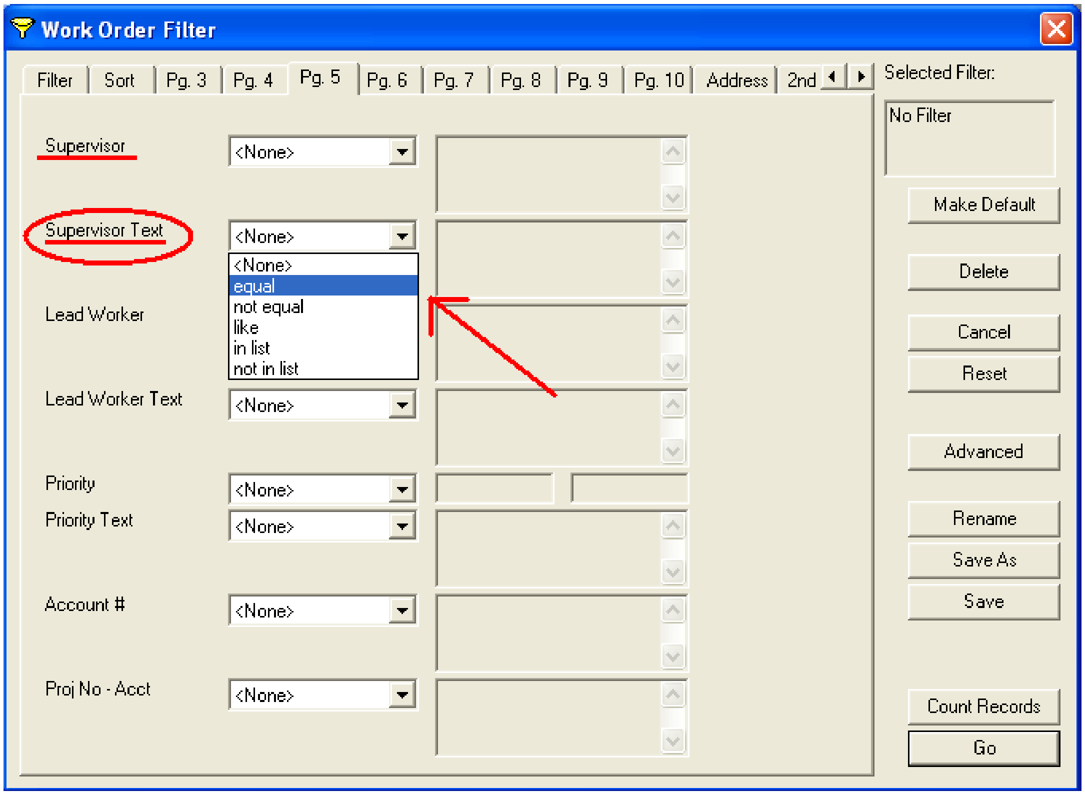
When you move through the tabs you'll see that the fields appear in the same order as they would in the Work Order module (or whatever module you are using). The right and left arrows  at the top-right of the screen allow you to move through the tabs and see more filter options.

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.

Filter with 'Equals' (Supervisor Name)



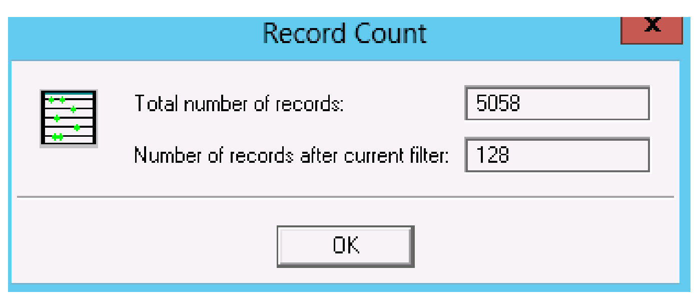
Since we want work orders with a specific supervisor's name, we'll set up a filter for Shane Harpo. To find his Work Orders we'll filter the records so that "Supervisor equals Shane Harpo".

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.

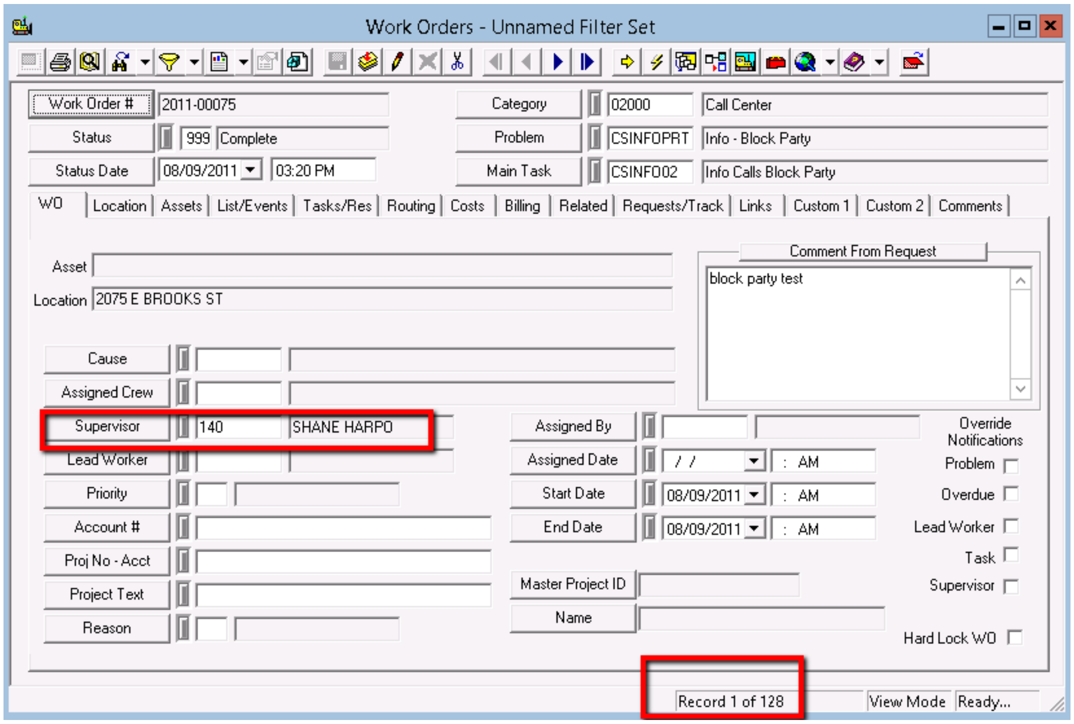
Count Records

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.



Go to Records

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).



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.

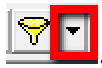
Hold down the CTRL or SHIFT keys and click to highlight each status indicating a current Work Order. The filter statement you're building reads something like this:

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

- ✓ 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.

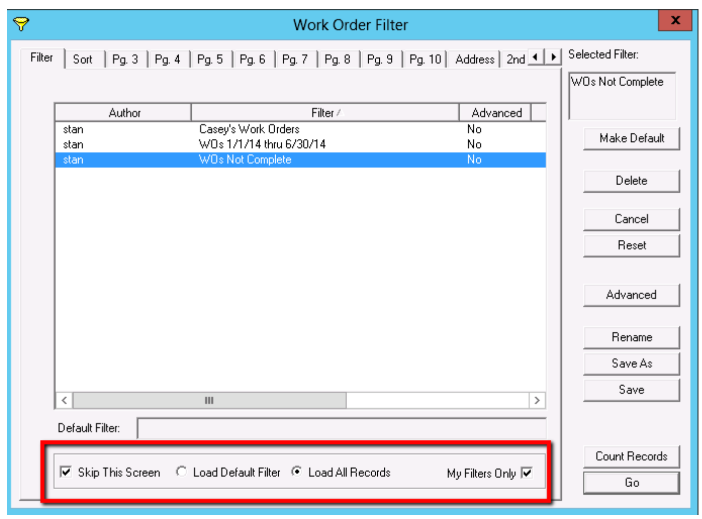
Save the Filter

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

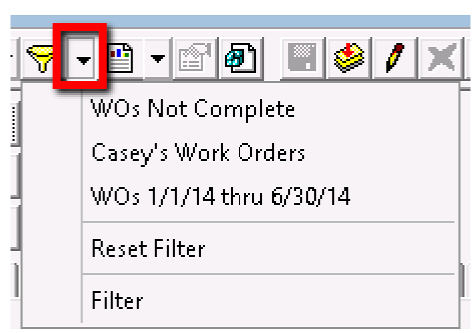
The selection buttons at the bottom of the “Saved Filters” list allow you to choose to display only your own saved filters and indicate whether or not a default filter will be used each time a module is opened. Note: Default filters are workstation specific.

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 right-hand 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

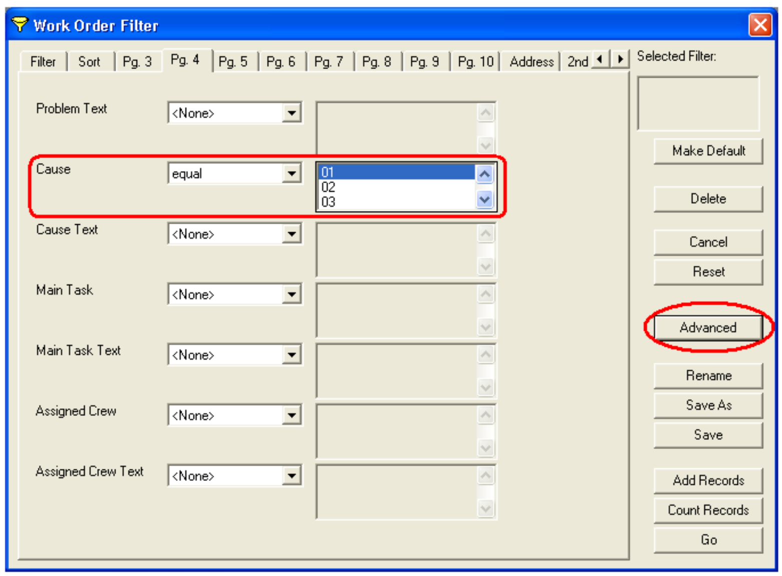
If you find that one of our standard filters does not provide the necessary results, you can use an advanced filter. Advanced filters are particularly useful if you want to query for null values or include 'or' statements in your query. In the following step-by-step examples, we'll show you how to create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

1. First, select a field to filter on. We'll use the Cause field in Work Orders.
2. Select 'equal' from the drop-down 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.



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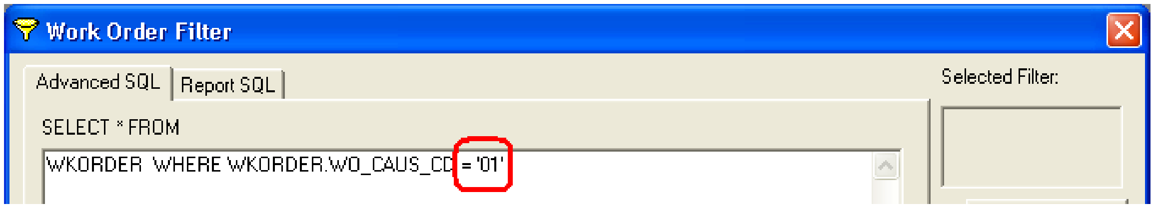
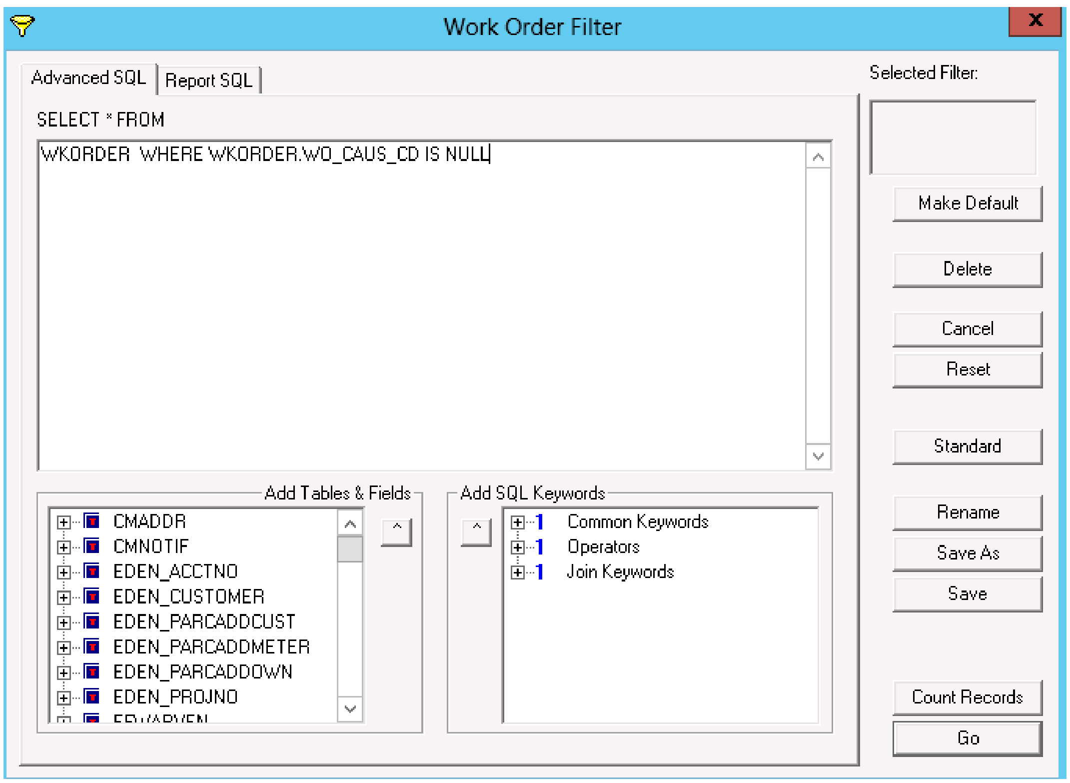
4. In the Advanced SQL window, delete the = sign and anything after it. Here, we'll delete the = sign and **'01'**.



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).



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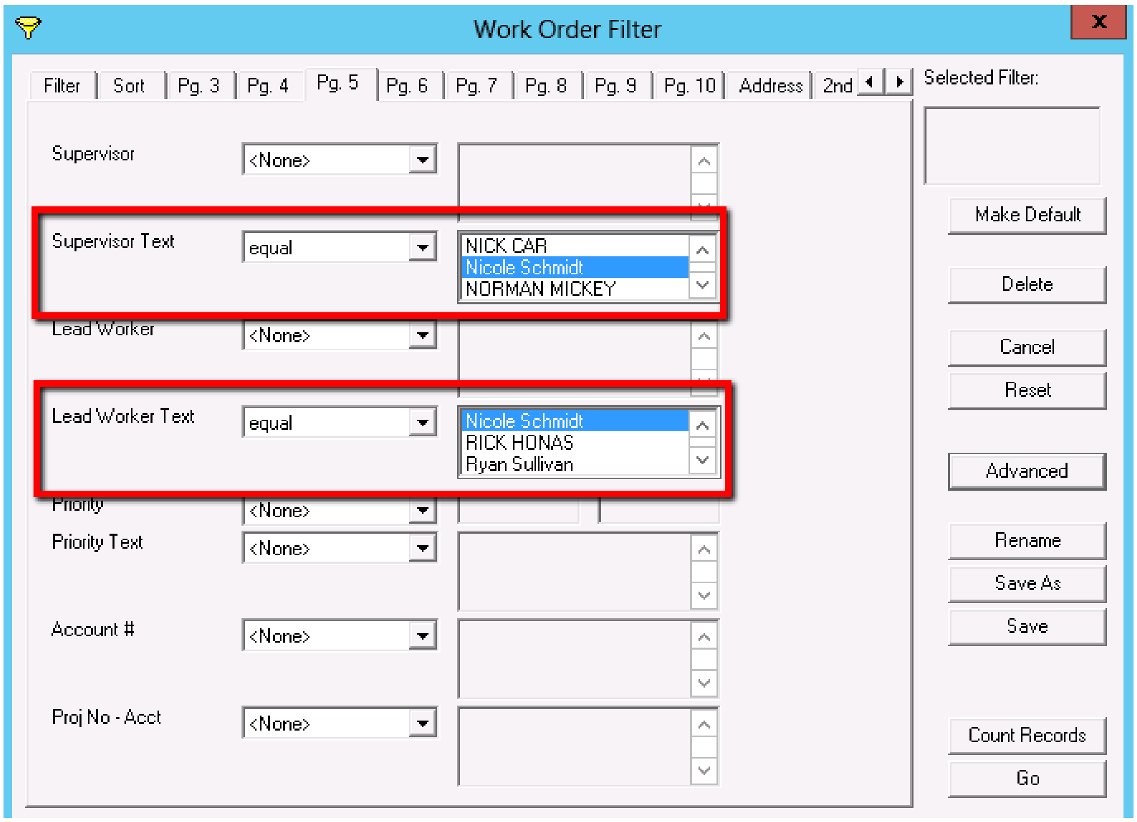
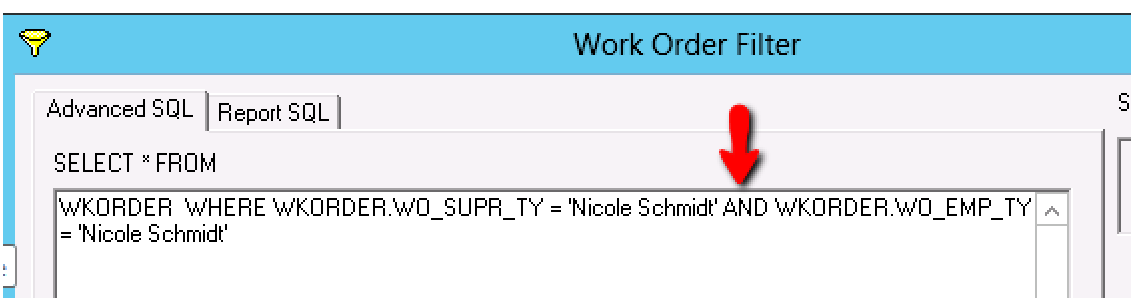
Filtering Using 'OR' Statements

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.

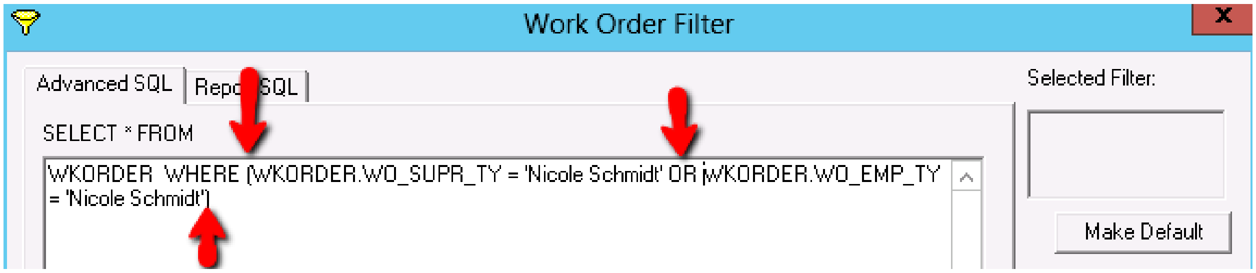
1. On Pg. 5 of the filter screen, set the Supervisor Text and Lead Worker Text equal to your name. Here, we've selected Nicole Schmidt.
2. As the filter appears initially, it will return all records where both the supervisor AND lead worker are Nicole Schmidt. Since we want to return records where she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





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')

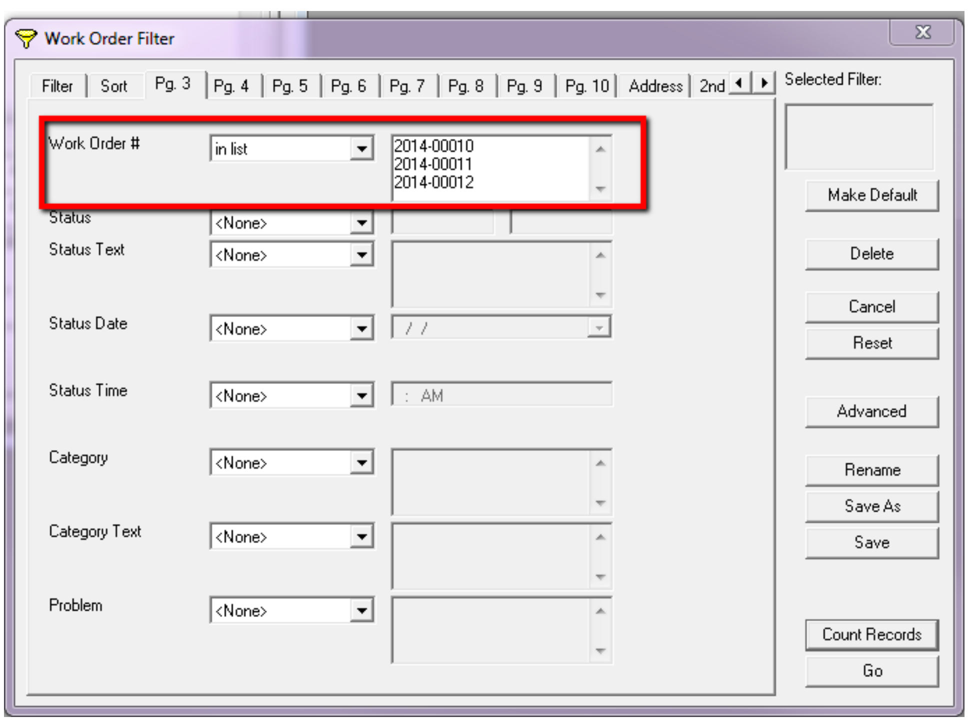


5. You can then click the *GO* button to access the filtered set. This filter will now return all records where Nicole Schmidt is listed as either the Supervisor OR the Lead Worker.

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.

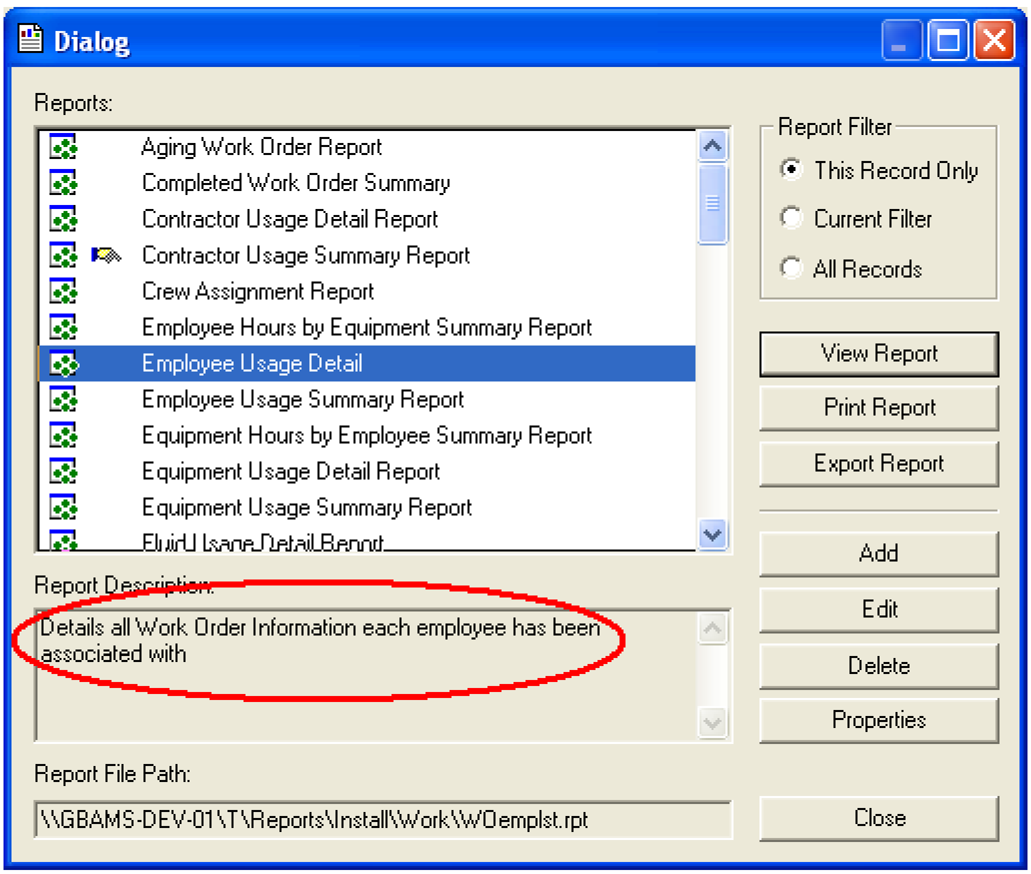


Reports

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™ 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.

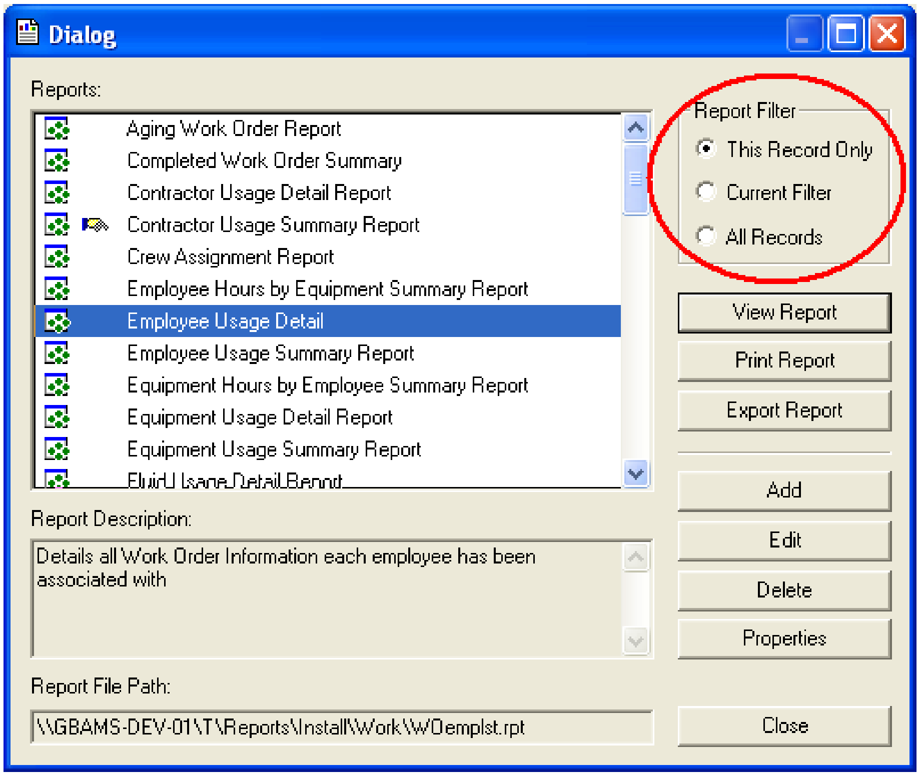
A supervisor may need a report documenting which work orders have been worked on by each employee. Our system contains a pre-defined report with just this information (the Employee Usage Detail report).

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.



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.



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.

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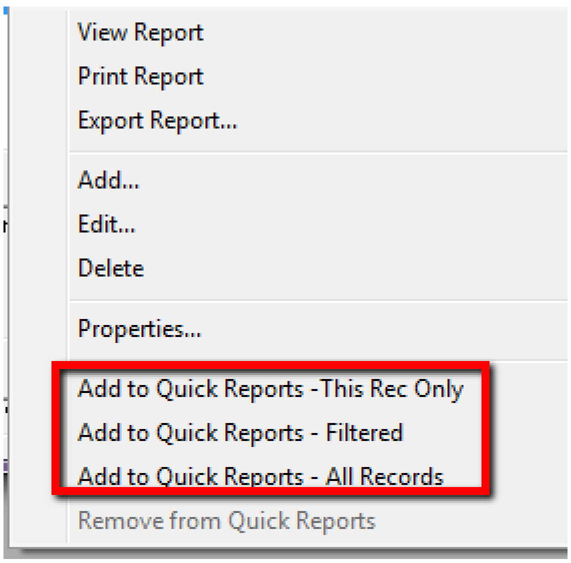
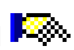
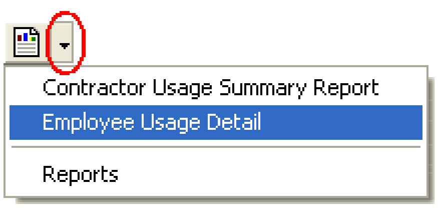
Quick Reports

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.



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.



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Browse

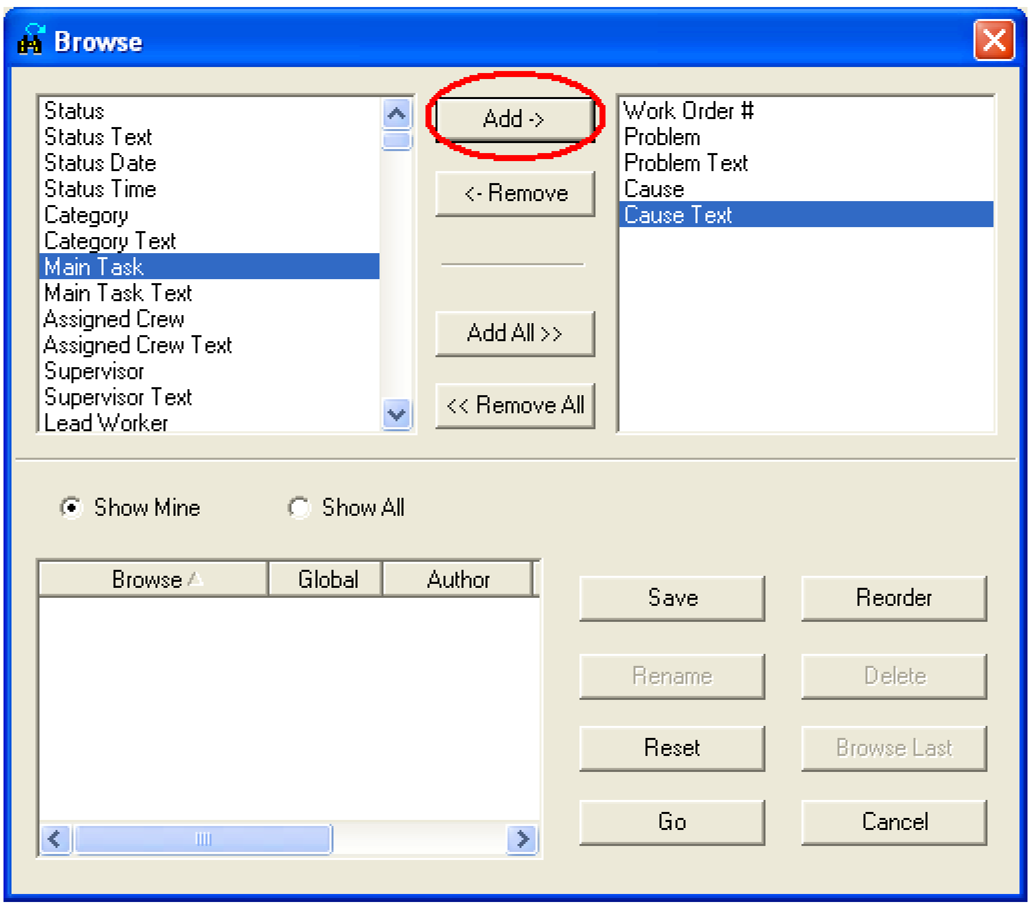
The Browse feature is used for reporting on-demand. It allows you to quickly generate a report in table format. The following example is from the *Work Orders* module; however, these same steps apply in all other modules.

1. To access the Browse function, click  on the module toolbar.
2. 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.

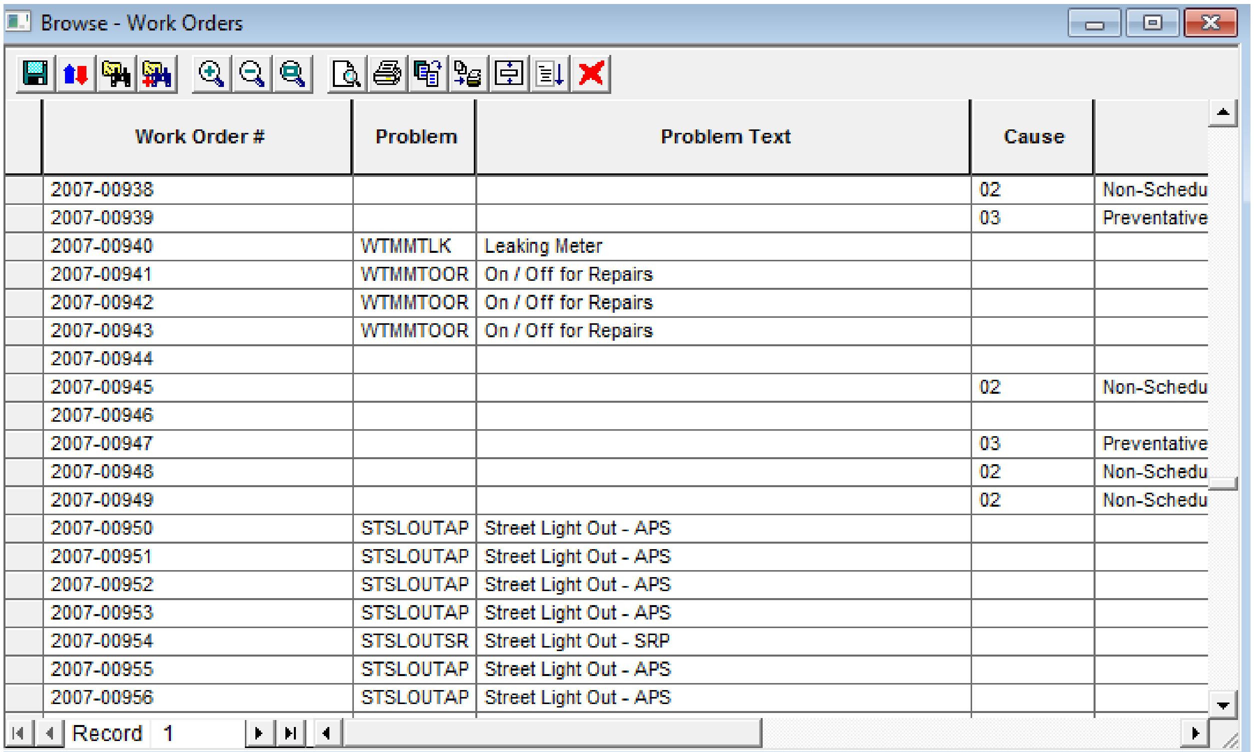
11. Click the  button to move it to the right-hand grid.

12. Continue adding additional fields as necessary.



Browse Report

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

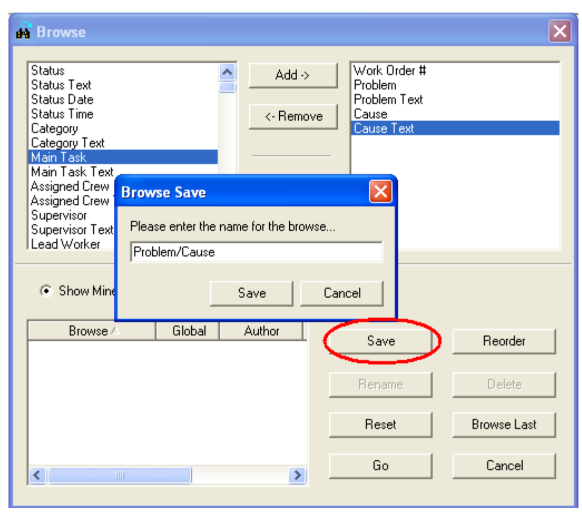


In the example above, we've selected Work Order #, Problem, Problem Text, Cause, and Cause Text. As you can see, the Browse report displays only the selected information.

Saving a Browse

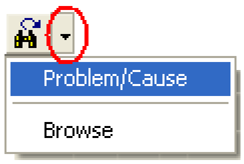
If this is a Browse report you would like to use frequently, you can save it to your Browse list.

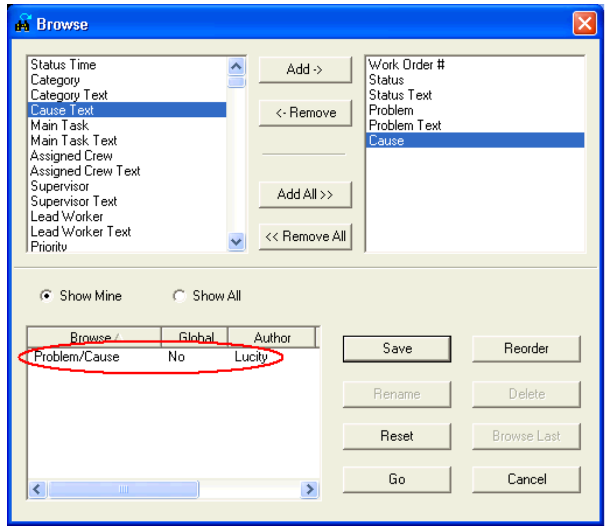
1. Click the Save button.
2. Enter a name for the Browse in the field provided.
   - Here, we've named the Browse "Problem/Cause".
3. Once the Browse has been saved, the name will appear in the grid at the bottom left-hand corner of the dialog.



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.





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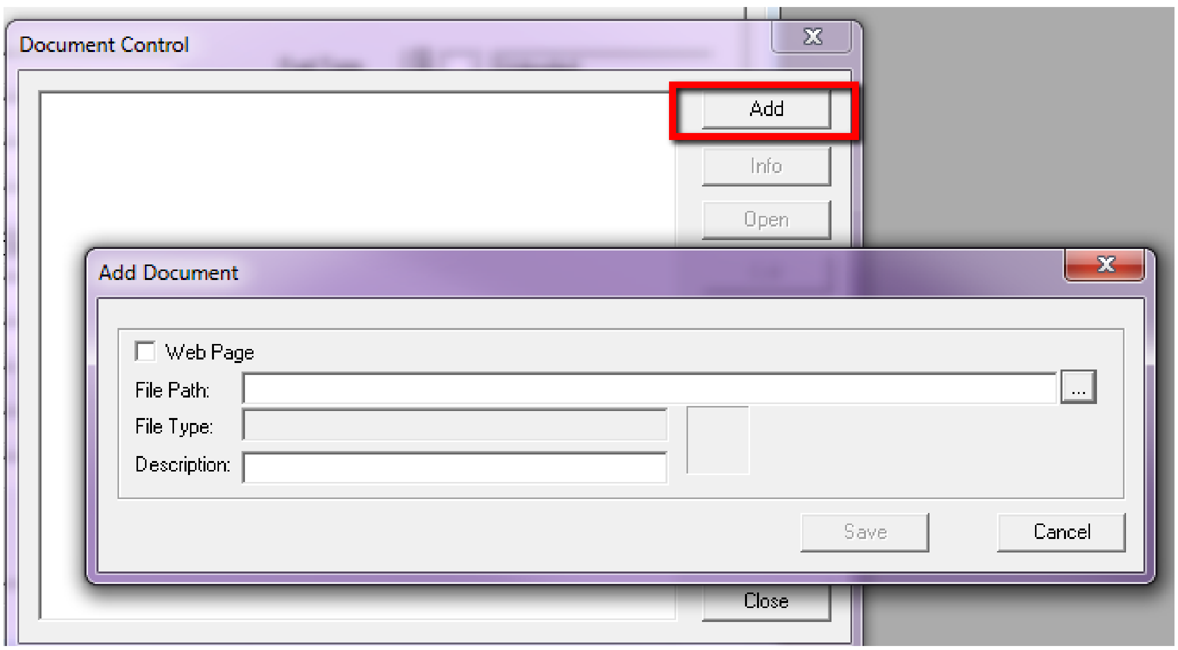
Document Control

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

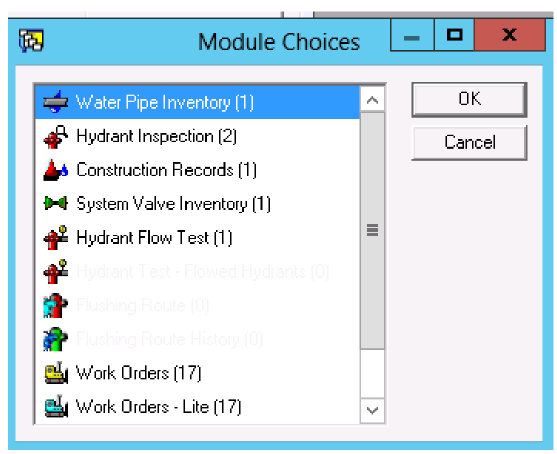
- It is important to remember that when adding documents on the desktop, the document is only linked to the asset in Lucity. If the document is deleted from your computer, it will no longer be accessible from the Lucity system. In addition, if the document is on your computer and not available to the 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:



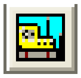
Relationship Button

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:

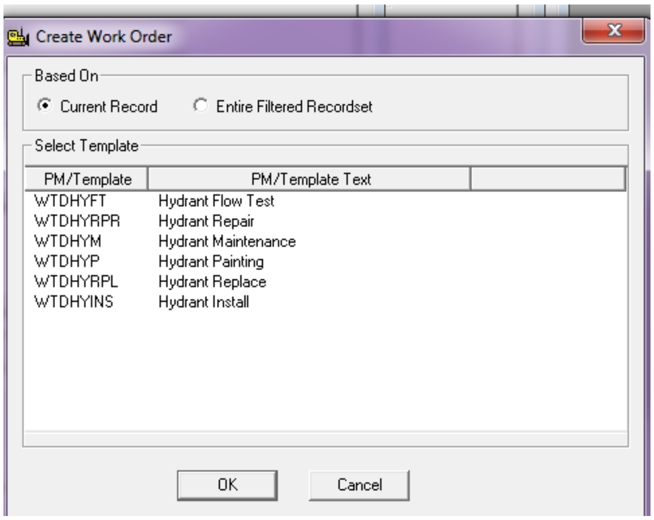


Clicking on one of the relationships will open the related record(s) in the other module.

Create Work Order

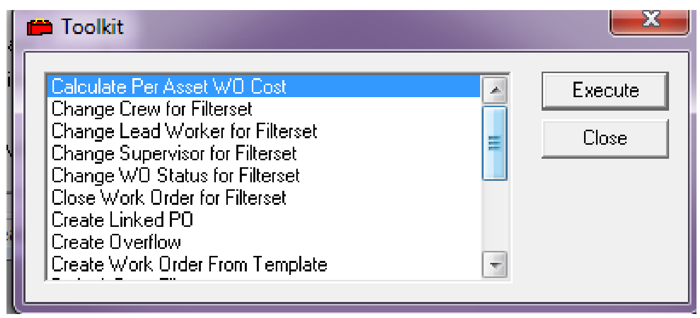


The Create Work order Button allows users to create new work order records directly from assets, inspections or work requests. This tool on the desktop can either create a work order(s) for the current record or the entire filterset. It can also create a work order based on a work order template. When 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:

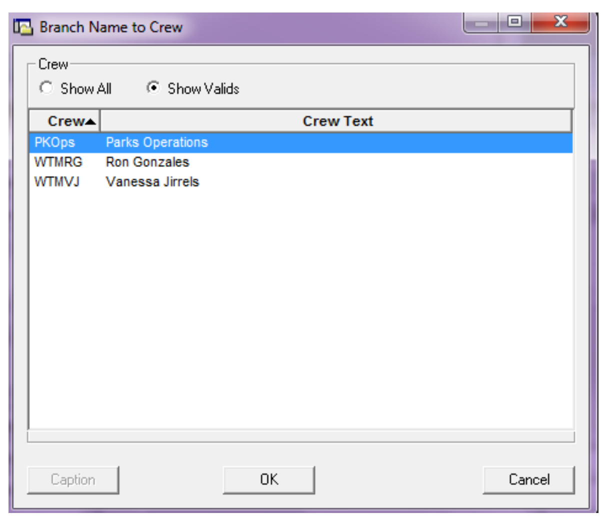


Toolkit

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:

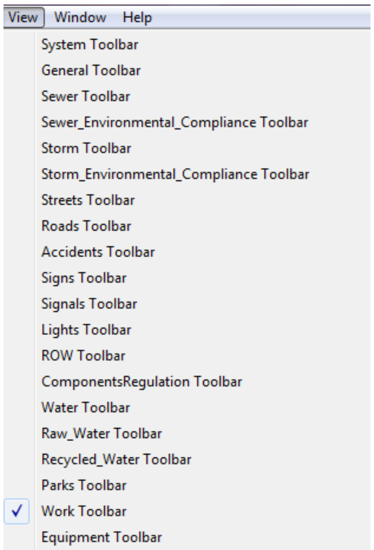


The help file is a good resource for providing detailed information about the toolkits.

Customizing Toolbars

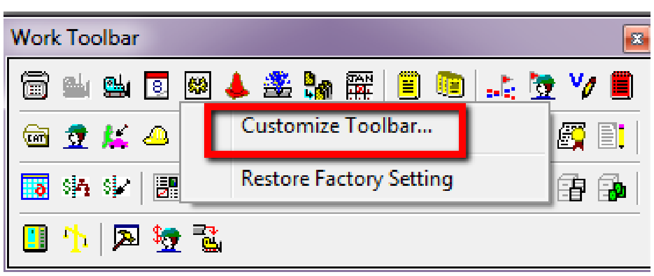
The desktop allows users to select toolbars to display and customize. This allows them to remove modules that they don't use, or arrange them to match their work flow.

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

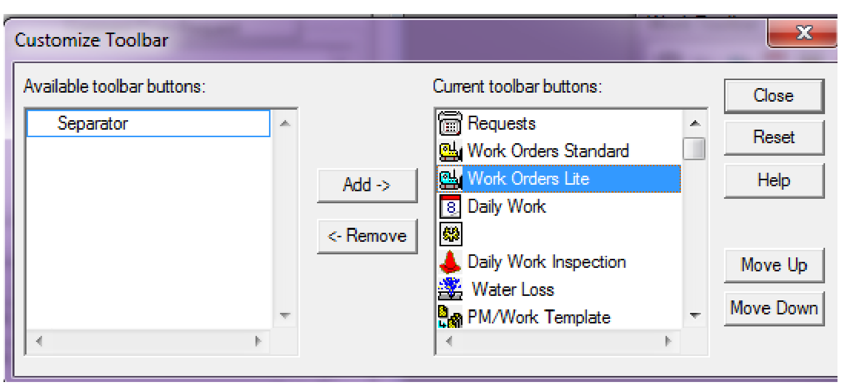


After selecting the toolbar, it will first display at the top of the desktop. It can be moved to a different location on the screen by clicking on the bar at the far left end and dragging it to a new position:

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



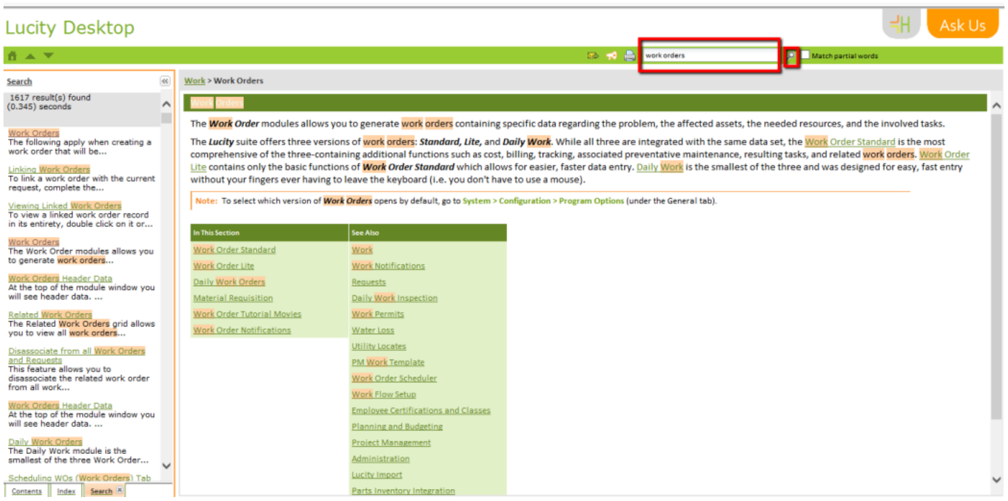
Module buttons can be added, removed, moved up/down, and separated by a Separator by using the buttons in the Customize Toolbar dialog:



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:



You can also drill down on the Contents menu to find detailed information on a specific topic or module: