

YOUuser Training

Lucity Web

2014 Lucity User Conference
Jerry Biedenbender, GIS Coordinator
SD1



Background

- SD1
 - Service area
 - Boone, Kenton, & Campbell Counties
 - These counties boarder the Ohio river
 - Sewer
 - 1,600 +/- miles of sanitary sewer lines
 - 46,000 +/- Sanitary Structures
 - 121 pump Stations
 - 15 flood Stations
 - 3 Regional Treatment Plants
 - 8 Small Package Plants
 - Storm
 - 437.5 +/- Miles of Storm Pipe
 - 31,758 +/- Storm Structures



Background Continued

1999 purchased GBA in – (January)

1999 Completed implementation – (November)

2011 Purchased Lucity Web in – (November)

2012 Implemented Lucity Web – (January)

2014 Configuring mobile Android – (January)

Modules

- Work
- Sewer
- Storm
- Equipment
- Fleet
- Facility
- Mobile
- Warehouse
- General
- GIS

Dashboard Progress

The screenshot displays the GIS software interface. At the top, the 'GIS Connection Strings' window shows a table with columns: Name, Map Service Url, Database, Server, and Instance. Below it, the 'GIS Map Services' window shows a table with columns: Name, Url, Order, Opacity, Tiled?, Disable Local Caching, Disable MetaData Queries, and Last Modified By. In the foreground, two 'Dashboard/Preferences' dialog boxes are open. The left dialog has the 'Users' radio button selected and lists names such as Adams, Mike (madams), Aman, Andy (aaman), Anders, Clint (canders), Appgar, Casey (capgar), Ashcraft, Clayton (cashcraft), Atkerson, Zach (zatkerson), Banta, Justin (jbanta), Baute, Marty (MPB), Baxter, Joe (JBB), Bentley, Robert (rbentley), Berens, Brian (bberens), Biddle, Donna (dbiddle), Biedenbender, Jerry (jbiedenbender), Bingham, Tony (tbingham), Blackburn, Omer (ORB), Boyle, Kyle (kboyle), Bracke, Tim (tbracke), Braunwart, Greg (GWB), Breeze, Scott (sbreeze), Brewer, Larry (lbrewer), Brewster, Ed (ebrewster), Brown, Samantha (sbrown), Bruns, George (GRB), Buerkley, Joe (jbuerkley), Buhte, Mike (MIB), and Burns, Rick (rburns). The right dialog has the 'Templates' radio button selected and lists templates such as CollectionSystems, CorrectiveMaintenance, CorrectiveMaintenance_CrewMember, Default, DryCreek, Facility, Field Technical Services, GeneralManager, GIS, Illicit, Inspectors, IT, SewerReview, and WesternRegional.

Name	Map Service Url	Database	Server	Instance
DEFAULT	http://gis02/ArcGIS/rest/services/Dashboard/DashboardEditConnection/MapServer/	GBAGIS	GIS02	5151

Name	Url	Order	Opacity	Tiled?	Disable Local Caching	Disable MetaData Queries	Last Modified By
ESRIStreetMap	http://server.arc...	0		True	False	False	jbiedenbender
Dashboard/Assets	http://gis02/Arc...	4		False	False	False	jbiedenbender
Dashboard/Corre...	http://gis02/Arc...	2		True	False	False	jbiedenbender
Dashboard/Corre...	http://gis02/Arc...	3		False	False	False	jbiedenbender
Dashboard/Inspe...	http://gis02/Arc...	3		False	False	False	jbiedenbender
Dashboard/Inspe...	http://gis02/Arc...	2		True	False	False	jbiedenbender
Dashboard/Defa...	http://gis02/Arc...	2		False	False	False	jbiedenbender
Dashboard/Defa...	http://gis02/Arc...	3		False	False	False	jbiedenbender
Dashboard/Sew...	http://gis02/Arc...	3		False	False	False	jbiedenbender

August 2012

- 229 people setup with dashboard
- 19 different templates
- 7 different map groups
- 17 ArcServer Services
- 76 “Shared Tabs”
- 85 customized Forms
- 119 customized Views

Where to start?

- 250 +/- Lucity Users within SD1
- Different types of users
 - Categorize and locate them.
- Identify departments
 - Make a list
- Set priorities and develop an action plan



10 steps to moving to Lucity Web

- Step 1
 - Choose a department and meet with the manager
- Step 2
 - Create Views/Grids/Forms
- Step 3
 - Set Securities
- Step 4
 - ArcGIS Server
 - Create Map Services
 - Add ArcServer services to (GIS map services) in lucity admin tools
- Step 5
 - Configure map setup
- Step 6
 - Setup Templates and apply shared tabs
- Step 7
 - Assign groups to forms
- Step 8
 - Configure menu's
- Step 9
 - Get organized
- Step 10
 - Training Training Training

Step 1 - Meet with the manager

- Choose fields (Packets)
- Choose employees
- Discuss map layers
- Discuss needs
- Decide on a layout
- Create and identify filters



Dashboard Layout

Illicit Page

Illicit Status (Illicit discharge)

- 8 Illicit total number of violations (Category: Illicit) ✓
- Detection (Status: Detection) ✓
- Investigation (Status: Investigation) ✓
- Enforcement (Status: Enforcement) ✓
- Completed (Status: Complete) ✓
- Remediated (Remediation Method: In list = Best Management Practices, Clean up, Disconnected, DOW, IHD, No Discharge, Other, Repaired) ✓
- Notifications (Remediation Method: In list = DOW, IHD) ✓
- No discharge (Remediation Method: Equal = No discharge) ✓

PCI - (Storm structures)

- 5 Total number of PCI outfalls (NKPDES Permit? = 1) ✓
- Annual total number Inspected ✓ *needed a subset or advanced query*
- PCI Under investigation ✓
- PCI Revisit ✓
- PCI Completed ✓

Work Orders

- 5 Work orders created (Requested By: In List = 633, 766, 862; Status Date: Greater Than = 3/1/11) ✓
- New Work Order (Requested By: In List = 633, 766, 862; Status Date: Greater Than = 3/1/11; Status Text: Equal = New Work Order) ✓
- Ongoing (Requested By: In List = 633, 766, 862; Status Date: Greater Than = 3/1/11; Status Text: Equal = On-Going) ✓
- Closed in field (Requested By: In List = 633, 766, 862; Status Date: Greater Than = 3/1/11; Status Text: Equal = Closed In Field) ✓
- Completed (Requested By: In List = 633, 766, 862; Status Date: Greater Than = 3/1/11; Status Text: Equal = Complete) ✓

Sample Inspections - (stream sampling)

- 2 Annual number of Sample Records (Sample Date: Between = 12/31/10 and 12/31/11) ✓
- Annual number of locations visited ✓ *needed a subset or advanced query*

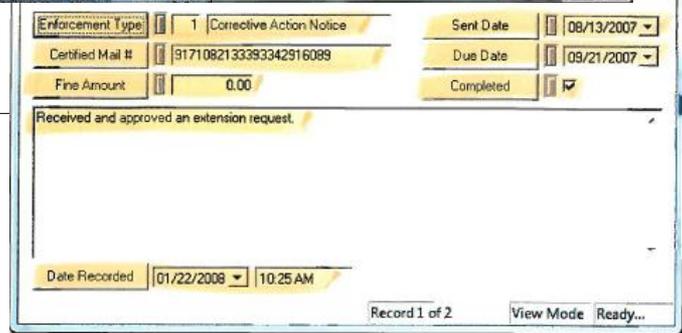
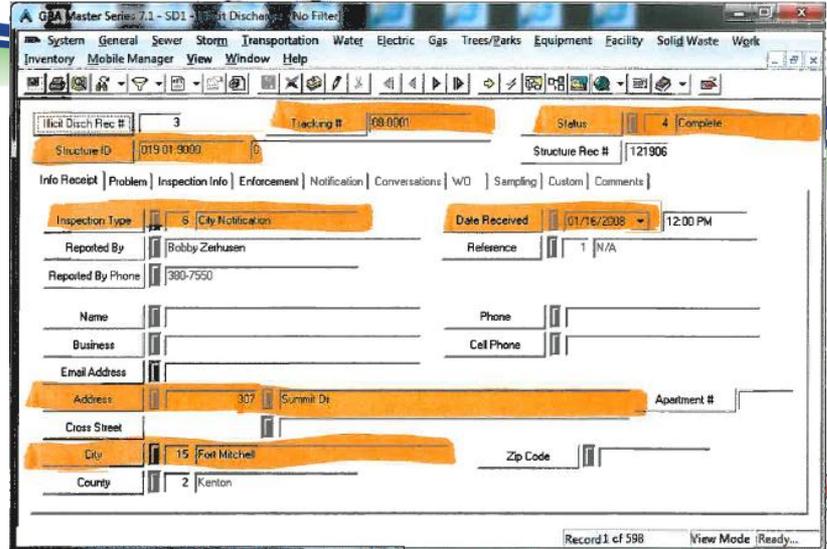
Pipe Diameter Inspections

- 2 Outfalls without pipe diameter - *down is getting with Jordan for office*
- Outfall inspected (Inspected By: DG, CA, CA, DG, CA; DG) ✓

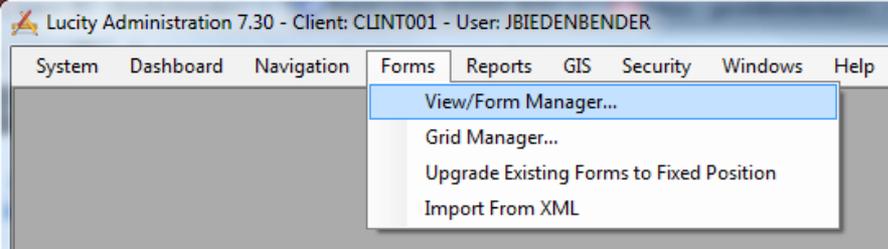
- Potable water (received: between = 1/1/2011 - 12/31/2011, category text: equal = illicit, contaminant: text = potable water) ✓
- Septic (received: between = 1/1/2011 - 12/31/2011, category text: equal = illicit, contaminant: text = septic) ✓
- Sewage (received: between = 1/1/2011 - 12/31/2011, category text: equal = illicit, contaminant: text = sewage) ✓
- Non point (received: between = 1/1/2011 - 12/31/2011, source: equal = non-point) ✓

Structures (Storm structures)

- Total number of outfalls (outfall type: in list = open, closed) ✓
- Total number of major outfalls (NPDES permit?: equal = 1) ✓
- Annual number of locations Inspected - *cannot do, requires subset*
- Annual number PCI Inspected - *cannot do requires subset*



Impact ✓
 = illicit ✓
 equal = ✓
 equal = ✓
 illicit ✓
 = illicit ✓
 11, Status: equal = ✓
 = 1/1/2011 - ✓
 Between 1-1-2011-12-31-2011 ✓
 (Between 1/1/2011 + 12-31-2011) ✓
 = 1/1/2011 - ✓
 = customer
 ification, city



Step 2 – Create Views, Grids & Forms

- Create a view...

View/Form Manager

STEP 1: Select Program: Work Order Manager

STEP 2: Select Module: Work Orders

STEP 3: Select Module Component: Work Orders

Show forms in preview mode

Custom Views

Templates Forms

34 Views/Forms

Name	Type	Enabled	Custom/Template	Assigned To Gr...	Assi
WorkOrders_Form_CollectionSystems	Form	True	Custom	In Group	
WorkOrders_Form_CorrectiveMainten...	Form	True	Custom	In Group	
WorkOrders_Form_Default	Form	True	Custom	In Group	NOT
WorkOrders_Form_DryCreek	Form	True	Custom	In Group	
WorkOrders_Form_Illicit	Form	True	Custom	In Group	NOT
WorkOrders_Form_Inspectors	Form	True	Custom	In Group	
WorkOrders_View_CollectionSystems	View	True	Custom	In Group	NOT
WorkOrders_View_CorrectiveMainten...	View	True	Custom	In Group	NOT
WorkOrders_View_Default	View	True	Custom	In Group	NOT
WorkOrders_View_DryCreek	View	True	Custom	In Group	NOT
WorkOrders_View_Illicit	View	True	Custom	In Group	NOT
WorkOrders_View_Inspectors	View	True	Custom	In Group	NOT

Enter Information

Name: WorkOrders_View_DryCreek

View Form

OK Cancel

Help
A view displays data in grid format, and can have a parent grid as well a child grids. Each of those grids may have a form associated to it.

New View Copy... Delete Rename... Assign Group...

Step 2 – continued

- Create grids...

The image shows two overlapping software windows: View Builder and Grid Builder.

View Builder Window:

- View Name:** WorkOrders_View_DryCreek
- Alternate View Name:** (empty)
- Step 1: Select a Grid Type:** A tree view showing 'Work Orders' selected, with sub-items like 'Work Order Tasks', 'Work Order Resources - Employees', etc., all checked.
- Step 2: Select a Grid:** A 'New Grid' button is highlighted with a red box.
- Step 3: Select a Form:** A 'New Form' button is visible.

Grid Builder Window:

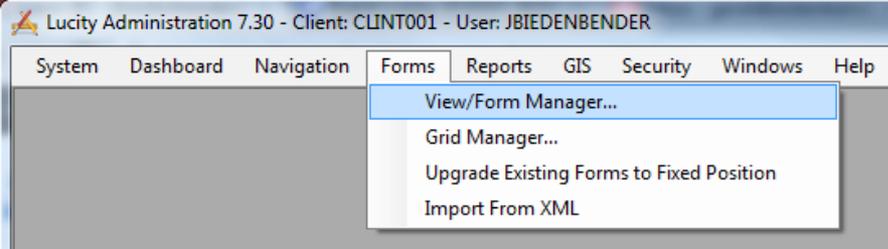
- Grid Name:** WorkOrder_Grid_DryCreek
- Grid Type:** Work Orders
- Caption:** Work Orders
- Page Size:** 20
- Description:** (empty)
- Column Editor:**
 - Available Columns:** Account #, Actual Equip Cost, Actual Labor Cost, Actual Labor Hours, Actual Material Cost, Area, Area Text, Arrival, Assigned By Text, Assigned Crew, Assigned Crew Text, Assigned Time, Backflow Valve Req., Bill Cell #, ...
 - Selected Columns:** Work Order #, Comment From Request, Asset, Address, Street Name, Status Date, Category Text, Problem Text, Main Task Text, Cause Text, Supervisor Text, Lead Worker Text, Reason Text, Requested By, Request Date, Start Date, End Date, Proj No - Acct, Department Text, Sub Dept.
- Properties:**
 - Display:** Header **Work Order #**
 - Field:** RelatedField: WO_NUMBER
 - Header:** Text to display at the top of the column in the grid.

Button Rules Form (pop-up):

Uncheck buttons that you want excluded from the grid.

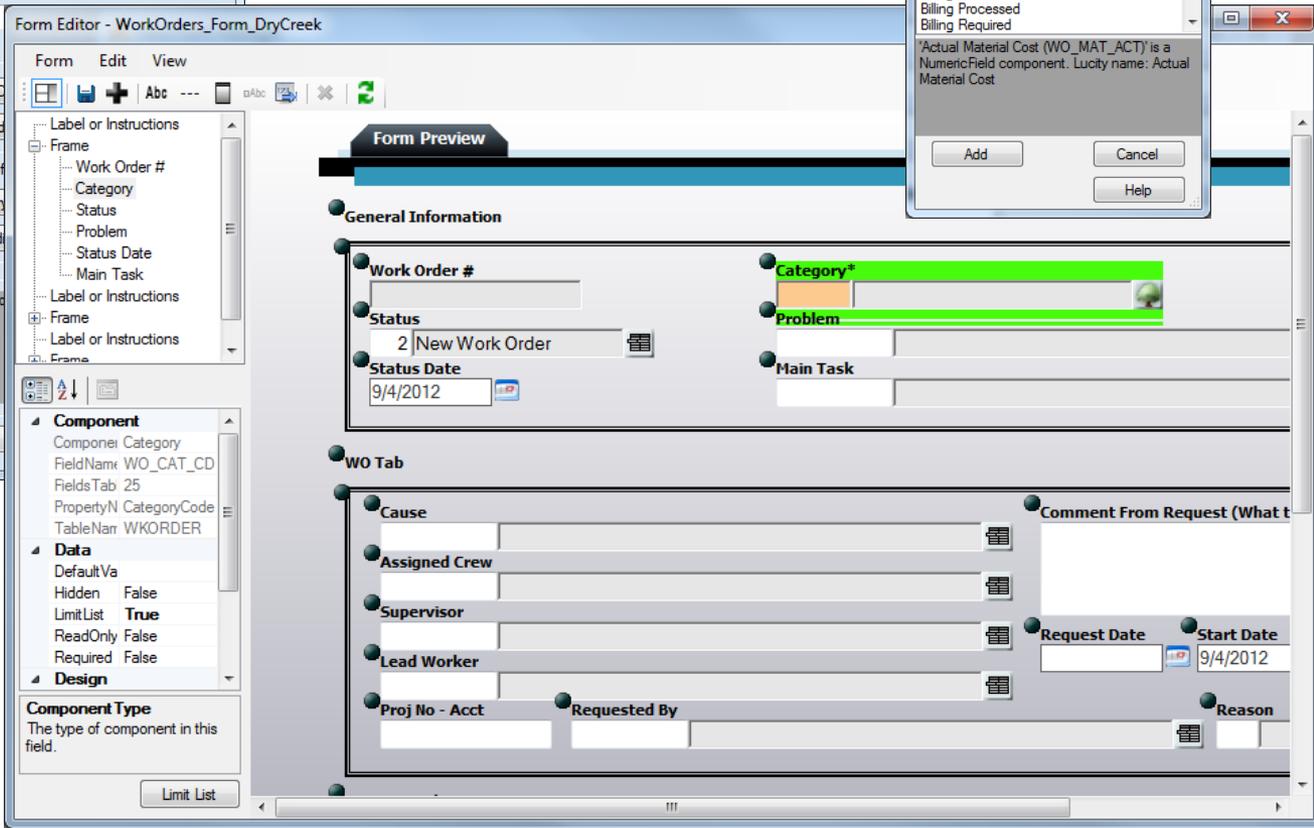
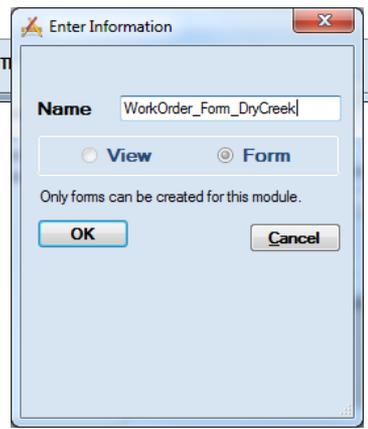
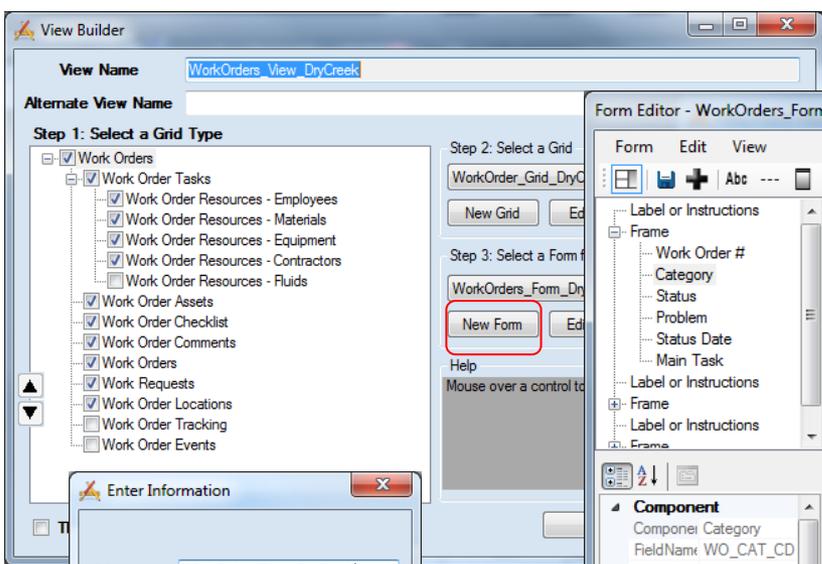
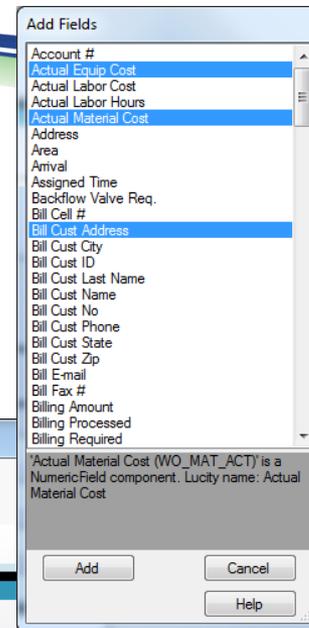
<input checked="" type="checkbox"/> Open In Desktop Button	<input checked="" type="checkbox"/> Report Button	<input checked="" type="checkbox"/> Open In Another View
<input checked="" type="checkbox"/> Create New WorkOrder Button	<input checked="" type="checkbox"/> Tools Button	<input checked="" type="checkbox"/> Show In Map Button
<input checked="" type="checkbox"/> Create New Request Button	<input type="checkbox"/> Delete Button	<input checked="" type="checkbox"/> Filter Button
<input checked="" type="checkbox"/> Subset Button		

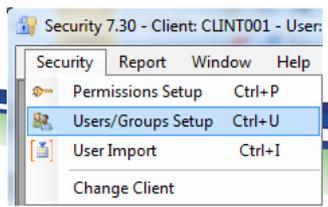
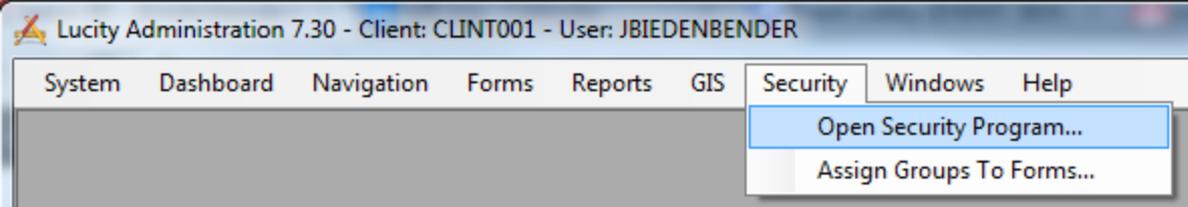
Buttons: OK, Cancel, Manage Buttons, Help, Save, Cancel.



Step 2 – continued

- Create Forms...





Step 3 – Set Securities

- Create groups, Assign permissions, Associate users, Set user default group

User And Group Assignments

View Copy

Users:

User ID	First Name	Last Name	Default Rules Group
aaman	Andy	Aman	Dash Inspectors
acarson	Al	Carson	Dash Corrective...
acotton	Andy	Cotton	Dash Collection...
adoyle	Andrew	Doyle	Dash GIS
aporter	Andy	Porter	
areis	Andy	Reis	Dash DryCre...
aspears	Amanda	Spears	
astamner	Alex	Stamner	Data Entry

Groups:

- Dash_Admin
- Dash_CollectionSystems
- Dash_CorrectiveMaintenance
- Dash_Default
- Dash_DryCreek**
- Dash_Facility
- Dash_FieldTechnicalServices
- Dash_GeneralManager
- Dash_GIS
- Dash_Illicit
- Dash_Inspectors
- Dash_IT
- Dash_SewerReview

Associated Groups:

- Dash_DryCreek
- Data View

Effective Permissions:

- Admin
- Equip
- General
- GIS
- Inv
- Sewer
- Stom
- Work

Associated Users:

- areis
- bberens
- canders
- clorentz
- dkoetting
- dtennant
- ebrewster
- glenhoff
- HWJ
- Iclare
- jbarita
- JBB
- JMC
- jverdin

Assigned Permission:

- Admin
- System
- General
- Dash
- GIS
- Admin Map Setup
- GIS Web Map
- Lucy GIS

Buttons: Associate, Disassociate, New User, Edit User(s), Copy User, Delete User(s), New Group, Copy Group, Reset Password(s)

Legend: Display User Permissions Only
 Denotes a permission is controlled by a User permission

- Dash_CallCenter
- Dash_CollectionSystems
- Dash_Construction
- Dash_CorrectiveMaintenance
- Dash_CSAssetRenewal
- Dash_Default
- Dash_DryCreek
- Dash_ERWRF
- Dash_Facility
- Dash_FieldTechnicalServices
- Dash_GeneralManager
- Dash_GIS
- Dash_Illicit

Step 4 – ArcGIS Server

- Create map Services...

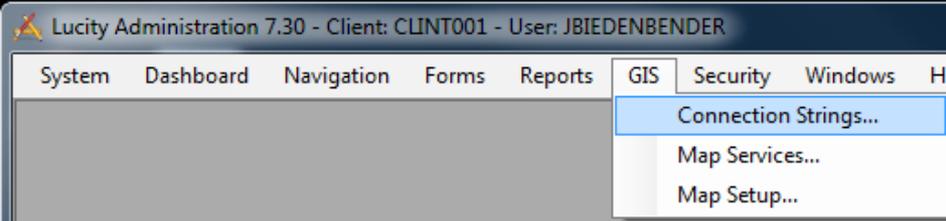
- Dynamic services
- Cached services
- Feature Service
- Photography service
- Data service
 - Alias's
 - See next slide

The screenshot displays the ArcGIS Server Manager web interface. The browser address bar shows the URL `gis02/ArcGIS/Manager/Default.aspx`. The page is titled "ArcGIS SERVER MANAGER" and includes a navigation menu on the left with sections for Home, Services, Applications, GIS Server, and Security. The main content area is titled "Manage Services" and shows a list of services under the "Dashboard" folder. The services are listed in a table with columns for Name, Type, Status, Instances (In Use/Running), Permissions, and Edit. The services listed are:

Name	Type	Status	Instances (In Use/Running)	Permissions	Edit
AerialPhotography	Map Service	Started	0/1	🔒	✎
Assets	Map Service	Started	0/1	🔒	✎
CorrectiveMaintenance_DynamicLayers	Map Service	Started	0/1	🔒	✎
CorrectiveMaintenance_StaticLayers	Map Service	Started	0/1	🔒	✎
DashboardEditConnection	Map Service	Started	0/1	🔒	✎
Default_DynamicLayers	Map Service	Started	0/1	🔒	✎
Default_StaticLayers	Map Service	Started	0/1	🔒	✎
Inspectors_DynamicLayers	Map Service	Started	0/1	🔒	✎
Inspectors_StaticLayers	Map Service	Started	0/1	🔒	✎
SewerReview_DynamicLayers	Map Service	Started	0/1	🔒	✎

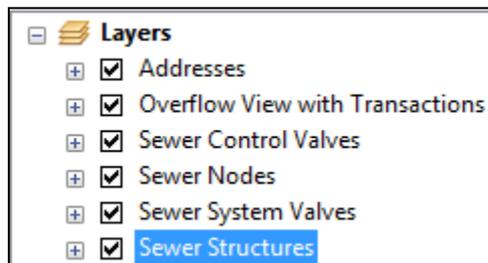
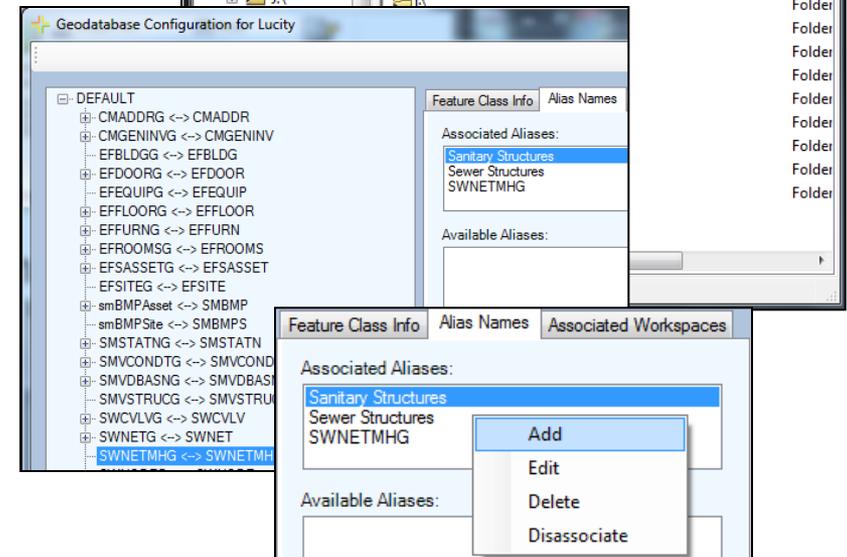
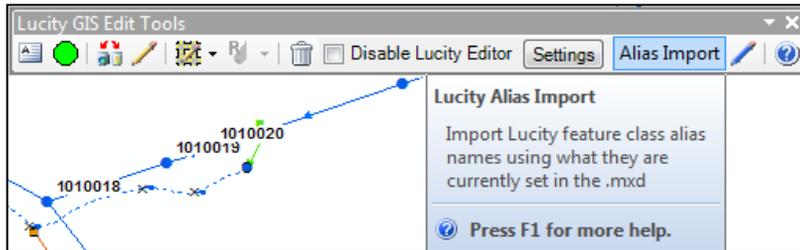
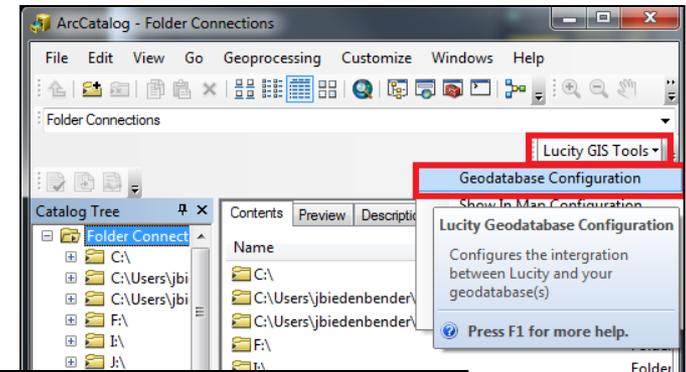
At the bottom left, the "GIS Server Status" section shows:

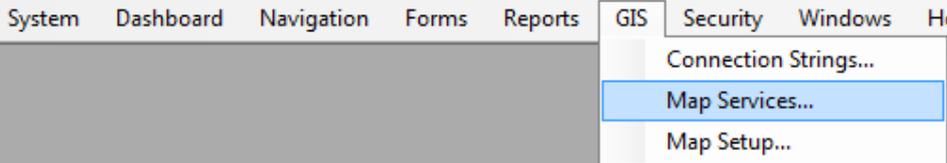
Name: gis02
Status: **Online**
Started: 9/4/2012 11:02 AM
Messages: View



Step 4 – Continued

- Aliases...
 - Verify Aliases are synced
 - Adding Aliases
 - Import Tool
 - Manual option





Step 4 – Continued

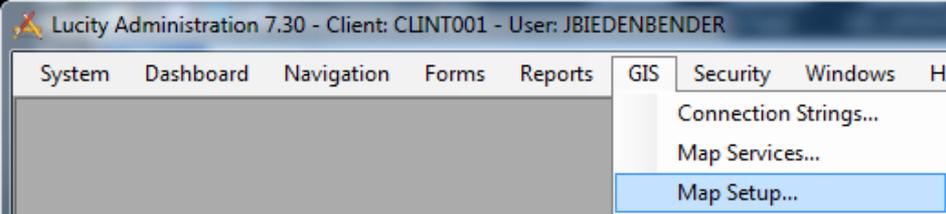
•GIS Map Services setup

- Name
- Url
- Order
- Opacity
- Tiled?

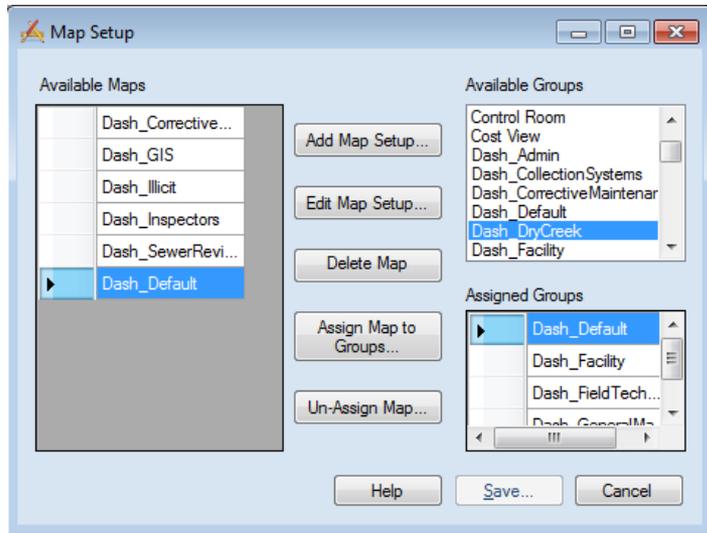
- Disable Local Caching
- Disable MetaData Queries
- LastModifiedBy
- LastModifiedDate
- LastModifiedTime

Name	Url	Order	Opacity	Tiled?	Disable Local Caching	Disable MetaData Queries	LastModifiedBy	LastModifiedDate	LastModifiedTime
ESRIStreetMap	http://server.arcgisonline.com/ArcGIS/rest/services/ESRI_StreetMap_World_2D/MapServer/	0		True	False	False	jbiedenbender	8/4/2011	7:45 AM
Dashboard/Assets	http://gis02/ArcGIS/rest/services/Dashboard/Assets/MapServer/	4		False	False	False	jbiedenbender	6/28/2012	1:33 PM
Dashboard/CorrectiveMaintenance_StaticLayers	http://gis02/ArcGIS/rest/services/Dashboard/CorrectiveMaintenance_StaticLayers/MapServer/	2		True	False	False	jbiedenbender	11/14/2011	6:04 PM
Dashboard/CorrectiveMaintenance_DynamicLayers	http://gis02/ArcGIS/rest/services/Dashboard/CorrectiveMaintenance_DynamicLayers/MapServer/	3		False	False	False	jbiedenbender	11/9/2011	12:53 PM
Dashboard/Inspectors_DynamicLayers	http://gis02/ArcGIS/rest/services/Dashboard/Inspectors_DynamicLayers/MapServer/	3		False	False	False			
Dashboard/Inspectors_StaticLayers	http://gis02/ArcGIS/rest/services/Dashboard/Inspectors_StaticLayers/MapServer/	2		True	False	False			
Dashboard/Default_StaticLayers	http://gis02/ArcGIS/rest/services/Dashboard/Default_StaticLayers/MapServer/	2		False	False	False			
Dashboard/Default_DynamicLayers	http://gis02/ArcGIS/rest/services/Dashboard/Default_DynamicLayers/MapServer/	3		False	False	False			
Dashboard/Sewer_Review_DynamicLayers	http://gis02/ArcGIS/rest/services/Dashboard/SewerReview_DynamicLayers/MapServer/	3		False	False	False			
Dashboard/Sewer_Review_StaticLayers	http://gis02/ArcGIS/rest/services/Dashboard/SewerReview_StaticLayers/MapServer/	2		True	False	False			
Dashboard/AerialPhotography	http://gis02/ArcGIS/rest/services/Dashboard/AerialPhotography/MapServer/	1		False	False	False			
Dashboard/DashboardEditConnection	http://gis02/ArcGIS/rest/services/Dashboard/DashboardEditConnection/MapServer/			False	False	False			

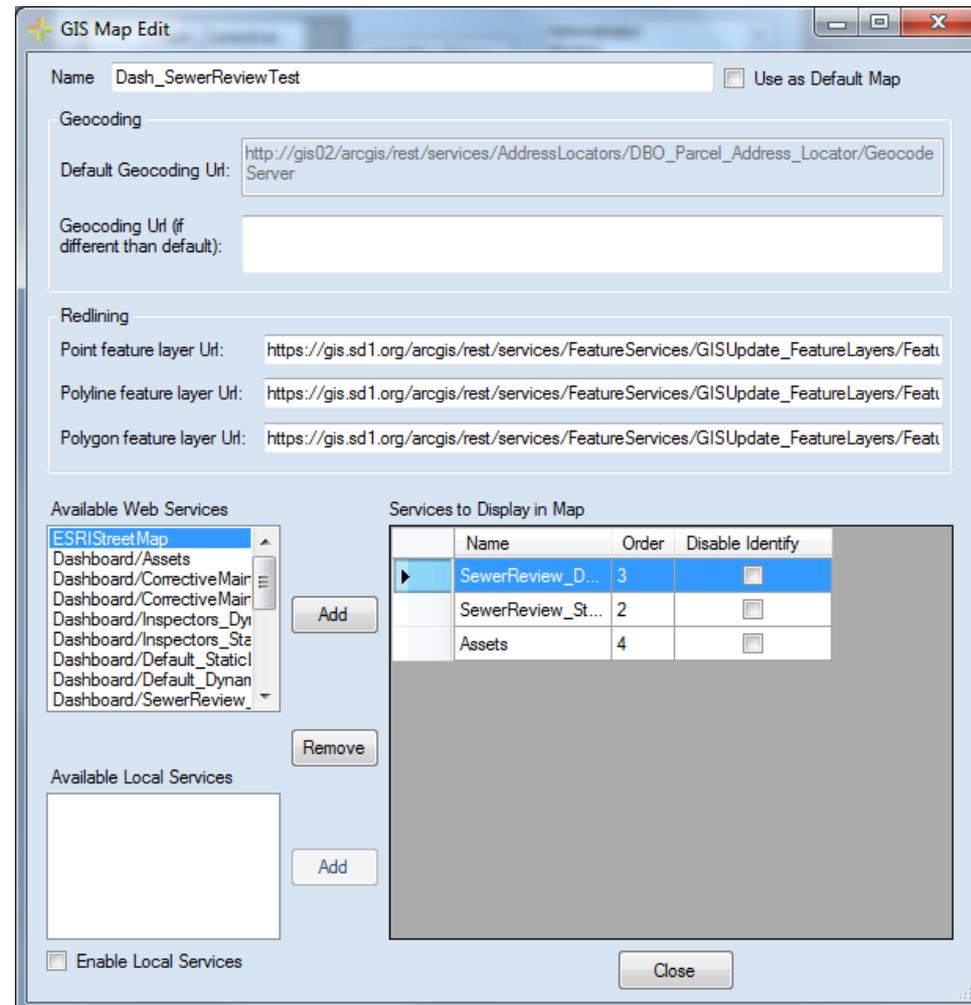
Dashboard/Default_DynamicLayers



Step 5 – Configure Map Setup



- Map Setup...
 - Add Map Setup
 - Configure Map
 - Assign Map to groups



Dashboard

The screenshot shows a web browser window displaying a dashboard for 'Lucity'. The browser address bar shows 'http://oldgis02/gbamsweb/default' and the page title is 'Lucity for clint001, - User jb...'. The dashboard features a navigation menu at the top with 'Home', 'Menu', 'Favorites', 'Open Views', and 'Modules'. On the left, a vertical sidebar lists categories: 'O&M Coordinator', 'Work Status', 'HVAC \ Electrical', 'Maintenance', and 'Lab & Industrial Monitoring'. The main content area contains six data cards for different users, each with a name, three icons, and a count of 'Open Work Orders'. The cards are: Ed Brewster (124), Greg Lenhoff (13), Chip Lorentz (0), Delbert Tennant (3), Scott Lucas (0), and Tim Nobel (0). Annotations with red arrows point to various elements: 'Dashboard Tab (Page)' points to the sidebar; 'Plugin-Data Drill (Filter)' points to the 'Open Work Orders' text in the Ed Brewster and Chip Lorentz cards; and 'Frame' points to the right edge of the dashboard content area.

User	Open Work Orders
Ed Brewster	124
Greg Lenhoff	13
Chip Lorentz	0
Delbert Tennant	3
Scott Lucas	0
Tim Nobel	0

Dashboard
Tab (Page)

Plugin-
Data Drill
(Filter)

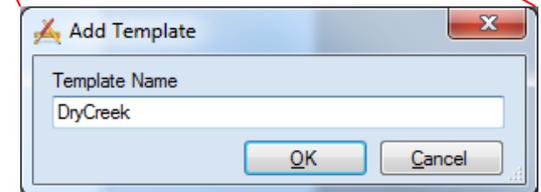
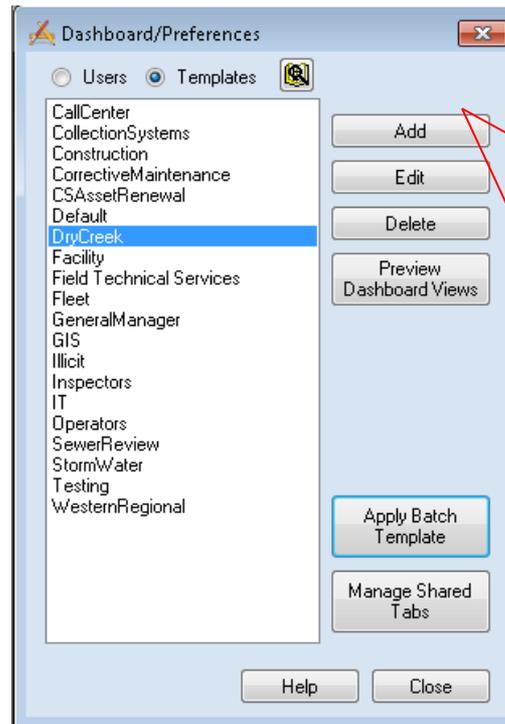
Frame

Step 6 – Setup templates and apply shared tabs

- Setup Template

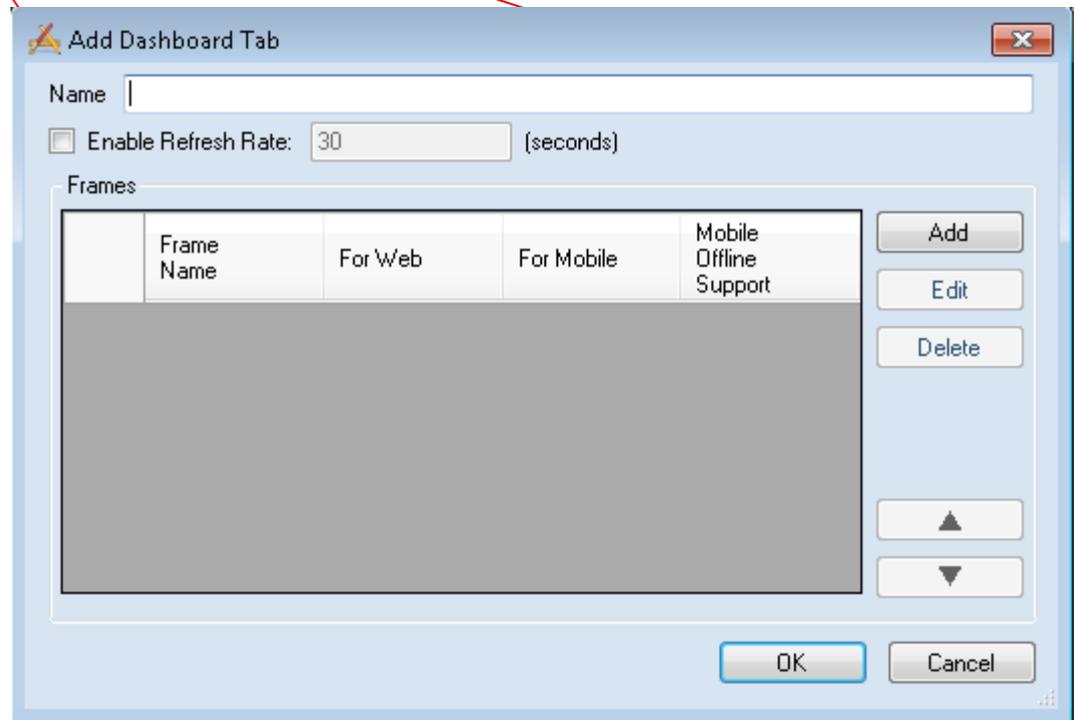
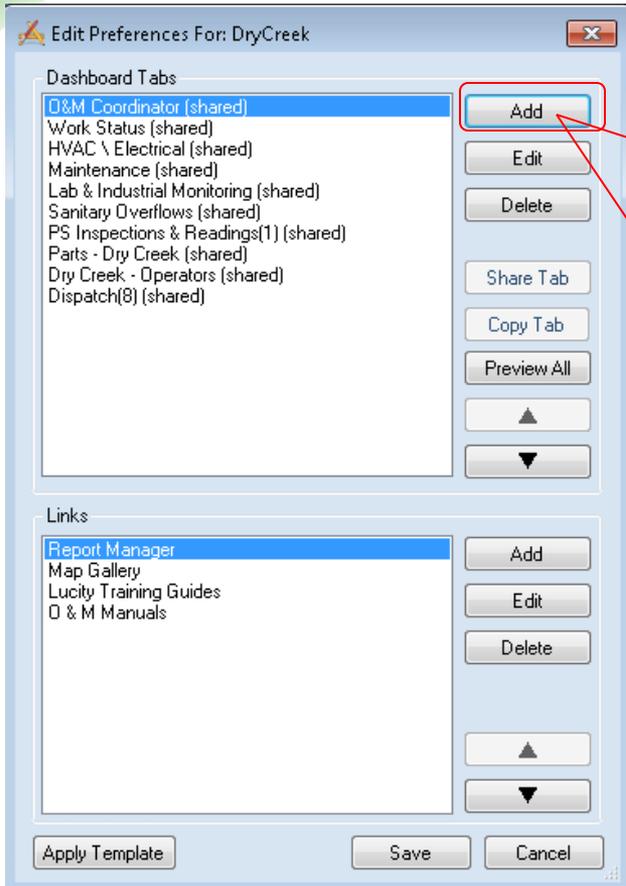
- Add Template
 - Add Tab
 - Add Frame
 - Add plug-in

- Add new template



Step 6 – Continued

- Add Tabs (*Pages*)



Step 6 – Continued

Edit Dashboard Tab

Name:

Enable Refresh Rate: (seconds)

Frames

	Frame Name	For Web	For Mobile	Mobile Offline Support
▶	Clint Anders	True	True	False
	Brian Berens	True	True	False
	Jason Case	True	True	False
	Dave Koetting	True	True	False
	Jeff Verdin	True	True	False
	Hasten Wright	True	True	False
	Mike Wood	True	True	False



Add Frame

Frame Name:

Span Frame

Show 'Launch In Desktop'

Show 'Launch In Web'

For Web

For Mobile

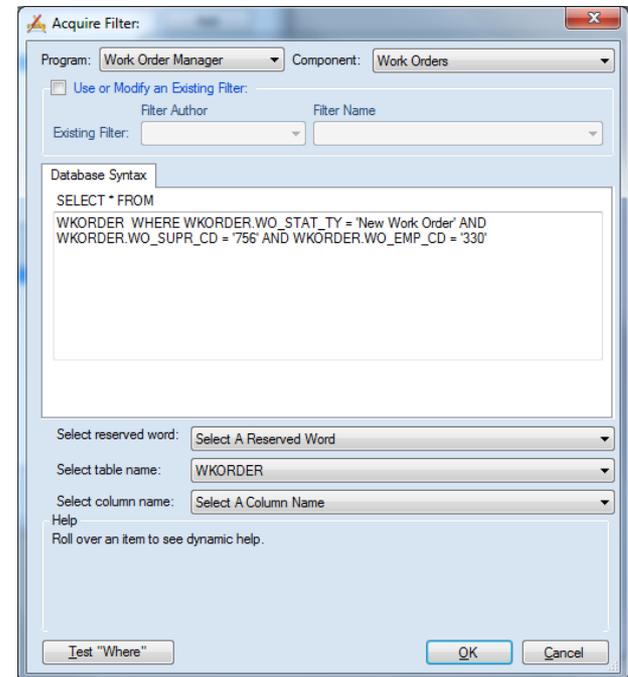
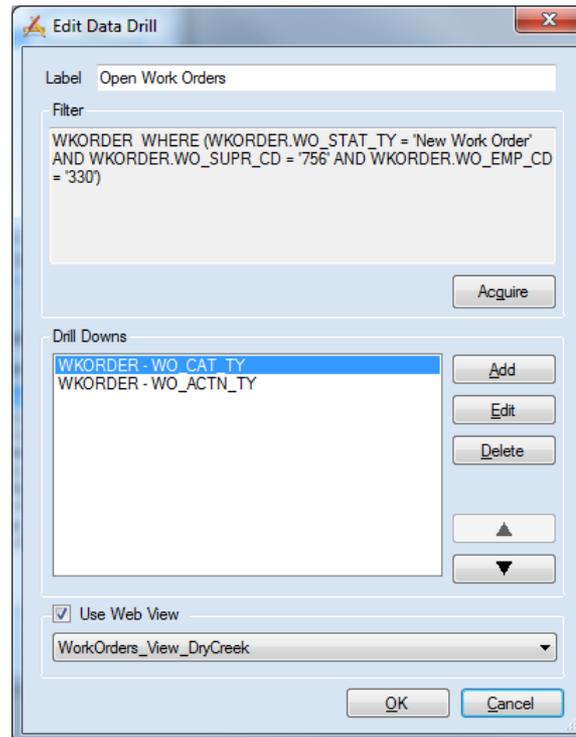
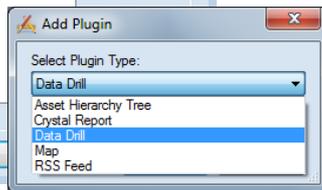
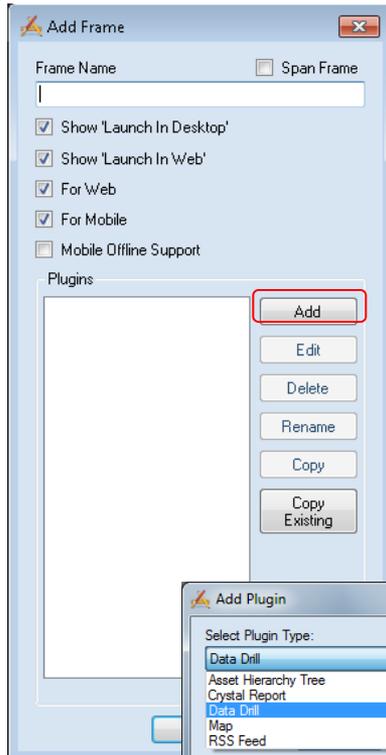
Mobile Offline Support

Plugins

- Add Frame

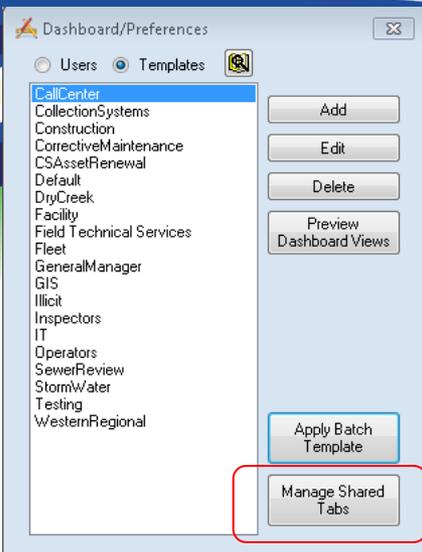
Step 6 – Continued

- Add plugins



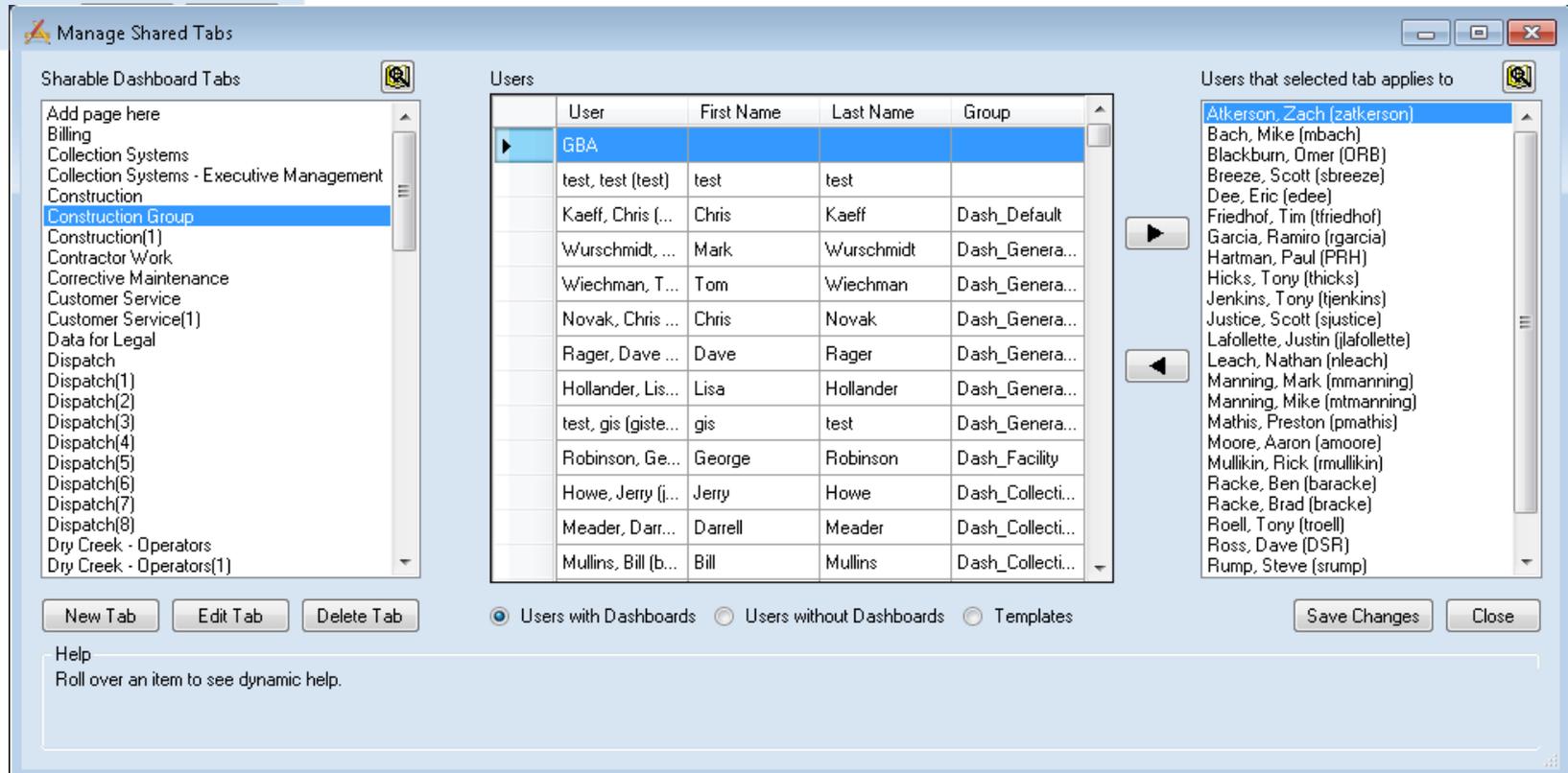
Advanced Filters

- **Work orders between 10-20 days old**
 - WKORDER WHERE (WKORDER.WO_STAT_CD < 800 AND WKORDER.WO_SUPR_CD = '418' AND ((WKORDER.WO_INIDATE >dateadd(day,-20,getdate()) AND (WKORDER.WO_INIDATE <dateadd(day,-10,getdate())))))
- **Structures as an asset on a specific type of work order**
 - **SWNETMH** WHERE SWNETMH.MA_USER12 > 59.9 AND (SWNETMH.MA_MHID) IN (SELECT AS_INV_ID FROM **WKWOASSET** WHERE (WKWOASSET.AS_WO_ID IN (SELECT WO_ID FROM **WKORDER** WHERE (WKORDER.WO_ACTN_CD IN ('1103', '1107', '1111', '1112', '1113', '1114', '1115', '1116', '1117', '1119', '1131', '1134') AND WKORDER.WO_STAT_DT > SWNETMH.MA_USER9)))
- **Past weeks trouble calls**
 - WKREQ WHERE (WKREQ.RQ_CAT_TY = 'Trouble Call' AND WKREQ.RQ_REC_DT >dateadd(week,-1,getdate()) AND RQ_MOD_DT <> #10/10/1911#)



Step 6 – Continued

- Manage shared tabs



lucity™ Listens



How can we improve the Dashboard or the Lucity Web UI?

← Dashboard and Web

3

votes

Vote

Shared tabs with templates

It would be nice if tabs could be shared with multiple templates. At time I have 5 different templates that need to view the same "shared tab", this results in me creating a copy of that tab 5 different times and then maintaining 5 of the same tabs....



Jerry Biedenbender shared this idea · October 30, 2013 · [Flag idea as inappropriate...](#)



ADMIN

COMPLETED

· **Nicole Schmidt** (Admin, Lucity) responded · August 25, 2014

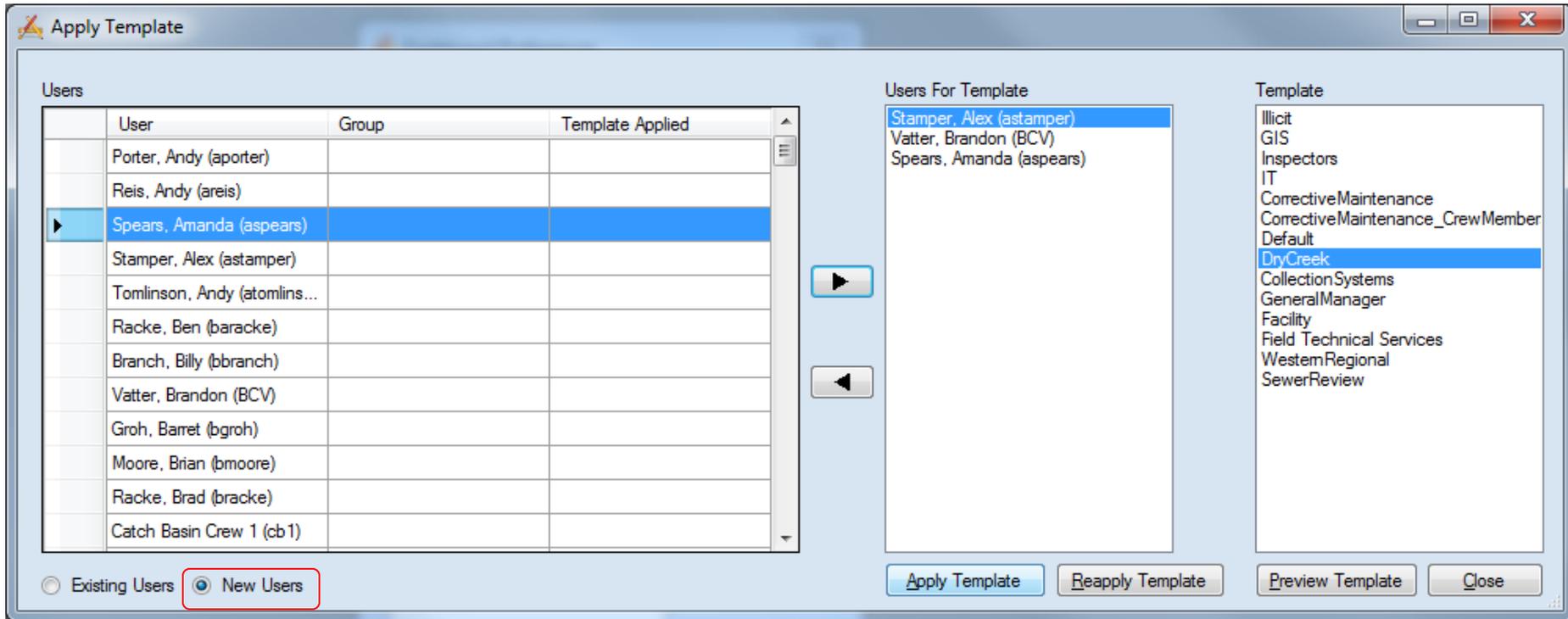
Lucity 2014 r2

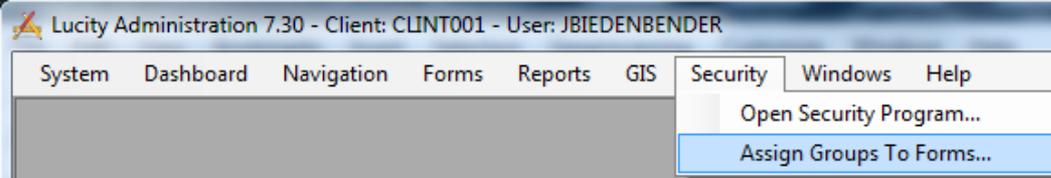
Show previous admin responses (1)



Step 6 – Continued

- Apply template





Step 7 – Apply groups to forms

- Choose defaults and customized views & forms

Assign Groups To Views/Forms

Groups

- Administrator
- BMP Edit
- cbcrew
- CD Report Writer
- CompleteWO
- Control Room
- Cost View
- Crew Leaders
- DailyWork
- Dash_Admin
- Dash_CallCenter
- Dash_CollectionSystems
- Dash_Construction
- Dash_CorrectiveMaintenance
- Dash_CSAssetRenewal
- Dash_Default
- Dash_DryCreek**
- Dash_ERWRF
- Dash_Facility
- Dash_Field Technical Services
- Dash_GeneralManager
- Dash_GIS
- Dash_Illicit
- Dash_Inspectors

Work Order Manager: Work Orders

Show All Views/Forms

Show Module Views/Forms

Assign Groups

Available Views/Forms

- WorkOrders_Fom_CollectionSystems_CB1
- WorkOrders_Fom_Construction
- WorkOrders_Fom_CorrectiveMaintenance
- WorkOrders_Fom_CSAssetRenewal
- WorkOrders_Fom_Default
- WorkOrders_Fom_DryCreek**
- WorkOrders_Fom_FieldTechnicalServices
- WorkOrders_Fom_Fleet
- WorkOrders_Fom_Illicit
- WorkOrders_Fom_Inspectors
- WorkOrders_Fom_ProjectManagement
- WorkOrders_Fom_PSInspection
- WorkOrders_Fom_SewerReview
- WorkOrders_View_CallCenter
- WorkOrders_View_CollectionSystems
- WorkOrders_View_CollectionSystems_CB1
- WorkOrders_View_Construction
- WorkOrders_View_CorrectiveMaintenance
- WorkOrders_View_CSAssetRenewal
- WorkOrders_View_Default
- WorkOrders_View_DryCreek**
- WorkOrders_View_FieldTechnicalServices
- WorkOrders_View_Fleet
- WorkOrders_View_Illicit

Select default view for selected group: WorkOrders_View_DryCreek

Assign default view to group

Refresh List

Group Properties

Users Assigned to Group: Dash_DryCreek

- aknowles
- bberens
- bmeier
- canders
- cbeil
- ccantrall
- ccooper
- clewis
- clorentz
- creynolds
- dkoetting
- dtennant
- ebrewster

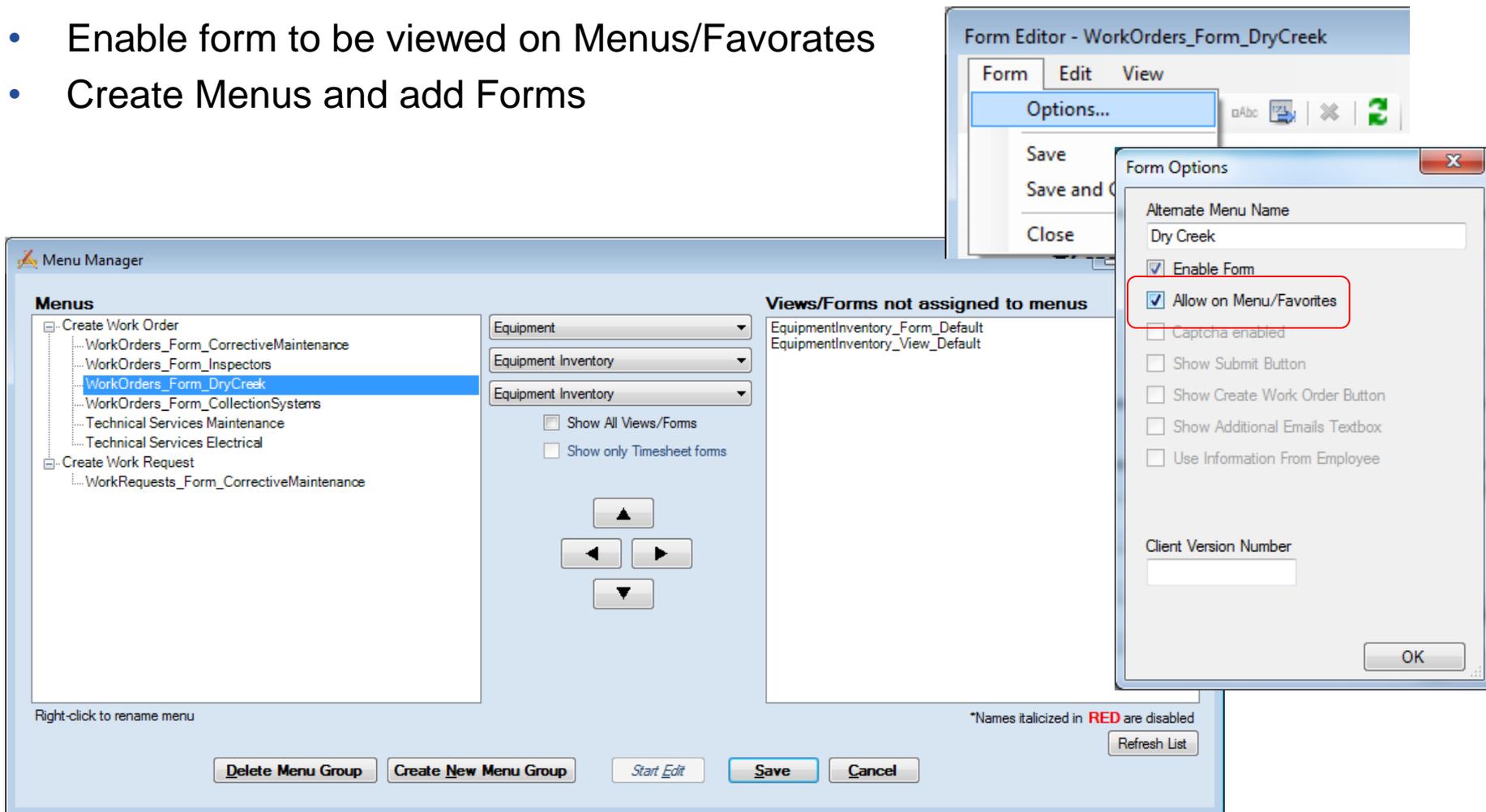
Forms this group has

- StomSampling_Vie
- StomStructureInsp
- StomStructures_V
- Technical Services
- Technical Services
- WorkOrderCommer
- WorkOrderResourc
- WorkOrders_Fom_Default
- WorkOrders_Fom_DryCreek
- WorkOrders_Fom_FieldTechnicalServices
- WorkOrders_View_Default
- WorkOrders_View_DryCreek
- WorkOrders_View_FieldTechnicalServices

Remove access to selected form(s)

Step 8 – Configure Menus

- Enable form to be viewed on Menus/Favorites
- Create Menus and add Forms



The screenshot displays the Lucy Administration interface. The top navigation bar includes links for Home, Menu, Favorites, Open Views, and Modules, along with buttons for Create Work Order and Create Work Request. The main interface is divided into several sections:

- Menu Manager:** A tree view on the left shows the menu structure. The "WorkOrders_Form_DryCreek" menu item is selected and highlighted in blue.
- Views/Forms not assigned to menus:** A list on the right shows items like "EquipmentInventory_Form_Default" and "EquipmentInventory_View_Default".
- Form Editor - WorkOrders_Form_DryCreek:** A floating window with a menu (Form, Edit, View) and a toolbar. The "Options..." menu item is selected.
- Form Options Dialog:** A dialog box with the following settings:
 - Alternate Menu Name: Dry Creek
 - Enable Form
 - Allow on Menu/Favorites (highlighted with a red box)
 - Captcha enabled
 - Show Submit Button
 - Show Create Work Order Button
 - Show Additional Emails Textbox
 - Use Information From Employee
 - Client Version Number: (empty field)

At the bottom of the Menu Manager, there are buttons for "Delete Menu Group", "Create New Menu Group", "Start Edit", "Save", and "Cancel". A note at the bottom right states: "*Names italicized in RED are disabled".

Step 9 – Get Organized

1	Employee	Group	Lucy Default Group	Status	Template	Map Group	Dashboard Training	Web-Map Training
77	McGillis, Rich (mcgillis)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		
78	Atkerson, Zach (zatkerson)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		
79	Blackburn, Omer (ORB)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (02/22/2012)	Completed (02/22/2012)
80	Boyle, Kyle (kboyle)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (03/02/2012)	Completed (03/02/2012)
81	Brauntwart, Greg (GWB)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (03/09/2012)	Completed (03/09/2012)
82	Breeze, Scott (sbreeze)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (02/22/2012)	Completed (02/22/2012)
83	Couch, Donnie (DRC)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (03/20/2012)	Completed (03/20/2012)
84	Hartman, Paul (PRH)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (04/26/2012)	Completed (04/26/2012)
85	Helm, Gerry (ghelm)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview	Completed (04/26/2012)	Completed (04/26/2012)
86	Howe, Jerry (jhowe)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		2/2012
87	Hurst, Mike (MRH)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		2/2012
88	Kiser, Cap (ekiser)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		2/2012
89	Manning, Mike (mtmanning)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		2/2012
90	Mcguire, Darleene (DSM)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		2/2012
91	Meador, Darrell (dmeador)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		9/2012
92	Mullins, Bill (bmullins)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		0/2012
93	Roberts, Donnie (DLR)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		9/2012
94	Ross, Dave (DSR)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		2/2012
95	Shanker, Robert (rshanker)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		0/2012
96	Spada, Jeremy (jspada)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	CollectionSystems	Dash_SewerReview		9/2012
97	Campbell, Josh (jcampbell)	Dash_CorrectiveMaintenance	Dash_CorrectiveMaintenance	In Use	CollectionSystems - MODIFIED	Dash_CorrectiveMaintenance		0/2012
98	Goerman, Tyler (tgoerman)	Dash_CollectionSystems	Dash_CollectionSystems	In Use	Default - Modified	Dash_SewerReview		janv 2012
99								
100	Rizzo, Debbie (drizzo)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		2/2012
101	Ashcraft, Clayton (cashcraft)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		2012
102	Cain, Karen (KMC)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		
103	Giles, Jim (JGG)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		
104	Ishmael, Jim (jishmael)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		4/2012
105	Lind, Thomas (tlind)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		7/2012
106	Madden, Mike (MPM)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		0/2012
107	Radford, Dave (DOR)	Dash_SewerReview	Dash_SewerReview	In Use	Dash_SewerReview	Dash_SewerReview		2/2012
108								
109								
110	Robinson, George (grobison)	Dash_Facility	Dash_Facility	In User	Facility	Dash_Default		
111	Penick, John (JLP)	Dash_Facility	Dash_Facility	In User	Facility	Dash_Default		
112	Hamberg, Steve (shamberg)	Dash_Facility	Dash_Facility	In User	Facility	Dash_Default		
113								
114	Foltz, Chris (CCF)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default	Completed (04/25/2012)	
115	Brewer, Larry (lbrewer)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
116	Buerkley, Joe (jbuerkley)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
117	Crone, Chris (ccrone)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
118	Emmons, Greg (gemmons)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
119	Galloway, Zac (zgalloway)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
120	Rabe, Kyle (krabe)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
121	Reis, Johnathan (jreis)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
122	Stanken, Phil (PWS)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
123	Thurman, Jim (jthurman)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
124	Warner, Mike (MFW)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
125	Westkamp, Larry (LJW)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		
126	Wiley, Vern (VLW)	Dash_FieldTechnicalServices	Dash_FieldTechnicalServices	In Use	Field Technical Services	Dash_Default		



Contacts ▾

NEW CONTACT

▾ My Contacts (329)

Starred

Account Services ...

Lucy Dash Users...

Step 10 – Training

Initially pulled whole departments into the training room for a two part back to back training.

- Section one “Dashboard”
- Section two “Web-Map”

Successful? – NO!!

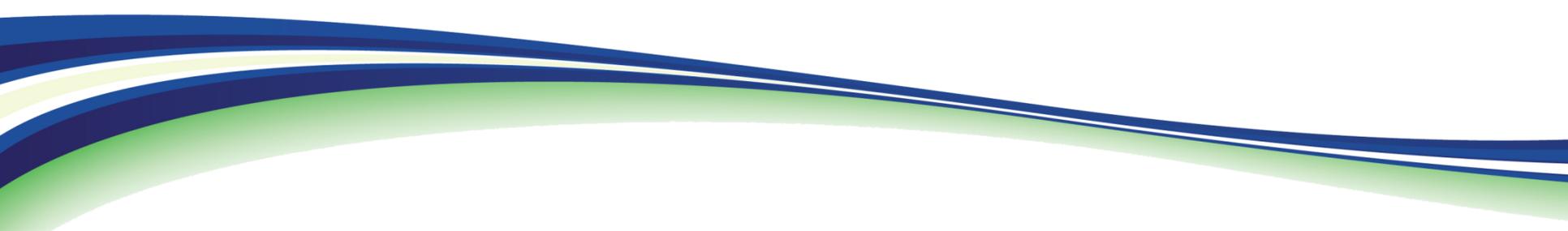
- Chaotic, Slow, impossible to follow my training plan.

Why?

- Too many people
- Distractions
- User needs
- Skill levels
- Lack of interest
- Unhappy about change
- Too long

Step 10 – Continued

- New method of training
 - 5 people maximum
 - All from the same department
 - Similar skill levels
 - 1 hours blocks of time maximum
- Successful? – Yes
- Why?
 - Relaxed pace
 - Easy for everyone to follow along
 - Less distractions



Dashboard success stories

- Fleet Department
- Trouble calls

Tablet success stories

- Structure inspections

Fleet



FleetInspections_Form_Default



Fleet ID*

Driver's Name

Most Recent Inspect

Odometer Reading

Engine Hours

Inspection Date*

Lock out / Remove from Service

Date of Occurance

Needs Attention

Exterior / Walk Around Inspection:

- Exterior Lights (Flashers, Turn signals, headlight)
- Splash Guards (Mud Flaps)
- Tires, Wheels, Rims, Lug Nuts
- Axle Seals
- Air/Electric Connectors
- Truck Bed Cleanliness
- License Plate
- Strobe Lights
- Windows/Wipers/Mirror

Engine Compartment:

- Fluid Levels
- Free of Significant Fluid Leaks
- Belts, Hoses, Wires

In - Cab Items:

- Break System Check (Bleed tanks)
- Heater / Defroster
- Panel Lights / Gauges
- Cab Area Cleanliness
- Tire Pressure Gauge
- Two - Way Radio
- Electric / Air Horn

Safety Items:

- Fire Extinguisher
- Seat Belts
- Chock Blocks
- Accident Packet
- Triangle Reflectors (3) - CDL
- First Aid Kit
- Hard Hat
- Traffic Vest

Brakes:

- Air Compressor
- Parking
- Drums, Linings
- Brake connections

Auxillary Engine or Equipment

- Fluid Levels
- Free of significant Fluid Leaks
- Hoses
- Mounting Hardware
- Compressed Gas Cylinders
- Cabinets / Enclosures

Aux Hours

Heavy Equipment Items:

- Engine
- Drive Line
- Clutch
- Transmission
- Rear End
- Starter
- Radiator
- Fuel Tanks
- Oil Pressure
- Battery
- Exhaust / Muffler
- Front Axle
- Frame and Assembly
- Steering
- Tracks
- Suspension System
- Body
- Hydraulic System
- Air Lines
- Safety Chains,Binders, Ratchet Straps
- Coupling Devices
- Coupling (King) Pin
- Hitch
- Fifth Wheel
- Reflective Tape/Decals

Other

- Drain Fuel/Water Separator
- Drain Brake Air Tank

Comments:

General Comment

[Menu](#) [Favorites](#) [Open Views](#) [Modules](#)

[Inspections](#) [Create Work Order](#) [Create Work Request](#) [Vehicle Inspections](#)

Vehicle Inspection

Vehicle Inspections



> Needs Attention (2)

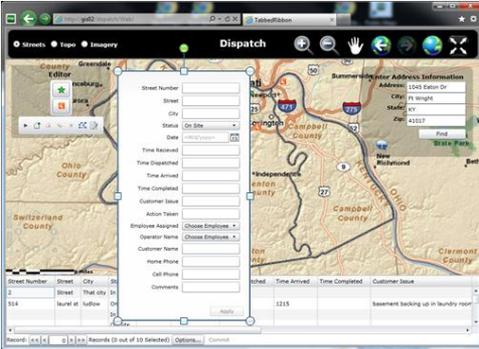
> Lock Out / Tag Out (1)

Vehicle Inspections



> No Inspection in the past 7 days (Department 2) (83)

Inspected in the past 7 days (Department 2) (0)



- [Menu](#)
- [Favorites](#)
- [Open Views](#)
- [Mo](#)
- [ctions](#)
- [Create Work Order](#)
- [Create Work Request](#)
- [Trouble Call](#)

Trouble calls

[Home](#)
[Menu](#)
[Favorites](#)
[Open Views](#)
[Modules](#)

jbiedenbender

Dispatch

Trouble calls

- ▶ Past week's Trouble calls (39)
- ▶ All Trouble Calls (6370)

TC Recorded By (Business Hours)

- Added by Faye Cossins (0)
- Added by Kelli Ashcraft (0)
- Added by Erica Campbell (0)
- Added by Todd Denham (0)
- ▶ Added by Karen Derrer (1)
- ▶ Added by Karen Forsyth (74)
- Added by Jenny Klute (0)
- ▶ Added by Tracy Stephenson (470)
- ▶ Added by Richard Turner (401)
- Added by Kelli Williams (0)
- ▶ Added by Debbie Yeagle (301)
- ▶ Added by Jessica Farris (368)
- ▶ Added by Craig Massie (534)
- ▶ Added by Kayla Evans (81)
- ▶ Added by Jason Elfers (28)
- ▶ Added by Carolyn Backus (32)

TC Recorded By (After Hours)

- ▶ Added by Gerry Helm (40)
- ▶ Added by Clayton Ashcraft (679)
- ▶ Added by Mark Groger (31)
- Added by Robbie Strumpf (0)
- ▶ Added by Darrell Meader (198)
- ▶ Added by Al Carson (1005)
- ▶ Added by Paul Hartman (150)
- ▶ Added by Cap Kiser (70)
- ▶ Added by Jeremy Spada (189)
- ▶ Added by Rich Dixon (4)
- ▶ Added by Scott Guy (4)
- ▶ Added by James Freiemuth (1)
- ▶ Added by Jake Meader (16)
- ▶ Added by Mitch Harthun (7)

[Home](#)
[Menu](#)
[Favorites](#)
[Open Views](#)
[Modules](#)

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WorkRequests_Form_CallCenter

Status: Status Date:

CUSTOMER INFORMATION

Phone # Home Phone # Cell Phone #

Name Last Name

Req Address Req Street Name Req City

Req Address 2 Req Street Name 2 Business

Building Type Comment from Customers

REQUEST

Category: Trouble Call

Problem

Cause

Loc Address Loc Street Name* City (Payroll)*

Loc Street2 Loc Street2 Name Loc City*

Supervisor* Trouble Call

DEPARTMENT/UTILITY LOCATES

Department: Collection System

Sub Dept: Customer Service

WO CUSTOM

System Type Drainage Area #

CUSTOM

Weather Conditions Info@

Tablet “Android App”

- We are still in Demo mode for the tablet.
- Setup
 - Documentation from Luke was very helpful
- Issues
 - SSL issue with dashboard
 - <http://support.microsoft.com/kb/938397>

Applications that use the Cryptography API cannot validate an X.509 certificate in Windows Server 2003

Construction

Customer
Service

Field
Maintenance

Outsource
Contract

Contractor Work

Gerry Helm

Dispatch(2)

Repair or
Rescore(1)

Greg Braunwart



- ▷ Open Work Orders Total: (55)
- ▷ Open Work Orders (1-10 days old) (5)
- ▷ Open Work Orders (10-20 days old) (2)
- ▷ Open Work Orders (20-30 days old) (7)
- ▷ Open Work Orders (>30 days old) (41)
- ▷ Closed In Field Total: (15)
- ▷ Closed in field (1-10 days old) (14)
- ▷ Closed in field (10-20 days old) (1)
- ▷ Closed in field (20-30 days old) (0)
- ▷ Closed in field (>30 days old) (0)

Craig Massie



- ▷ Open Work Orders Total: (10)
- ▷ Open Work Orders (1-10 days old) (1)
- ▷ Open Work Orders (10-20 days old) (2)
- ▷ Open Work Orders (20-30 days old) (1)
- ▷ Open Work Orders (>30 days old) (6)
- ▷ Closed In Field Total: (9)
- ▷ Closed in field (1-10 days old) (7)
- ▷ Closed in field (10-20 days old) (1)
- ▷ Closed in field (20-30 days old) (0)
- ▷ Closed in field (>30 days old) (1)

Darrell Meader



- ▷ Open Work Orders Total: (60)
- ▷ Open Work Orders (1-10 days old) (6)

Bill Mullins



- ▷ Open Work Orders Total: (91)
- ▷ Open Work Orders (1-10 days old) (6)

Construction Group

Dispatch(3)

Dave Ross - (Supervisor)



- ▲ Open (150)
 - ▷ New Work Order (119)
 - ▷ On-Going (29)
 - ▷ On-Hold (2)
- Closed In Field (0)
- Closed In Field & Est. Misc Cost = 0 (0)

Lead Workers



- ▲ Scott Breeze (59)
 - ▲ New Work Order (53)
 - Barscreen - (Weekly) (3)
 - Cleaned Grate (1)
 - Patton St. Bar Screen - (Weekly) (1)
 - Raised structure (13)
 - Removed structure (2)
 - Repaired line (3)
 - Repaired structure (4)
 - Replace frame and/or lid (2)
 - Restoration (5)
 - Sealed structure (8)
 - Vector debris (10)
 - Vectored structure (1)
 - ▷ Omer Blackburn (39)
 - ▷ Paul Hartman (32)
 - ▷ Undefined (18)



Add ARV Inspection

Tech Services
(Work Status)

PS Inspections &
Readings

Pump Stations



- ▷ SD1 PS (122)
- ▷ Walton PS (11)
- ▷ Airport PS (3)
- ▷ All (194)

Pumps & Generators

- ▷ Pump Station - Pumps (387)
- ▷ Generators & Stand By Pumps (92)

Valves



- ▷ ARV (184)



GIS - Home Page

Stormwater
Inventory Quality
Control

Sewer Inventory
Quality Control

Pipes



Alt ID Number Incorrect (877)

Diameter = 0 or NULL (1710)

Pipe Shape = 0 or NULL (28062)

Material = 0 or NULL (14435)

Length Status = 0 or NULL (7516)

Owner = 0 or NULL (188)

Surface = NULL (51569)

Length = 0 or NULL (8)

Liner = 0 or NULL (52693)

Type = 0 or NULL (359)

Status = NULL (57789)

Flow Type = 0 or NULL (1602)

City = NULL (19389)

Abandoned with Incorrect Ownership (5)

Pump Stations



Owned by = Null (1)

Managed by = Null (1)

Station Type = Null (13)

Facility = Null (1)

Structures

Cover Material = 0 or NULL (29492)

Facility = 0 or NULL (14614)

Location = 0 or NULL (6094)

Rim Elevation = 0 or NULL (10987)

Component Type = 0 or NULL (413)

Structure Type = 0 or NULL (13629)

Diameter = 0 or NULL (35783)

Depth = 0 or NULL (21753)

Wall Material = 0 or NULL (29974)

Owner = NULL (1124)

City = 0 or NULL (10417)



Work Order #	Asset	Address	Street Name	Status Text	Status Date
--------------	-------	---------	-------------	-------------	-------------

- + 14-018027
- + 14-017755
- + 14-016503
- + 14-015905

14-018310 - Dye test (9/8/2014 - 9/8/2014)

Work Order Resources - Materials

Resource Type Text	Emp/Equip/Mat	Unit of Measure	Unit of Measure Text	Default Unit Cost	Hours or Quantity	Unit Cost	Total Cost	Grand Total Cost
--------------------	---------------	-----------------	----------------------	-------------------	-------------------	-----------	------------	------------------

Work Order Resources - Equipment

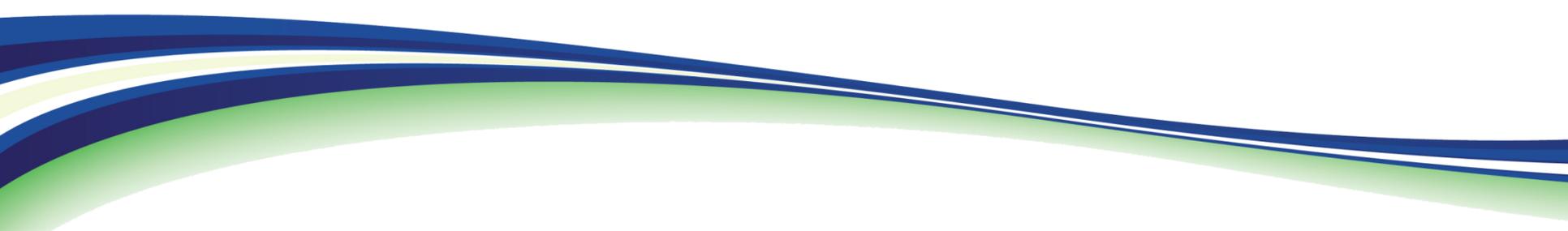
Equip Emp	Resource Type Text	Emp/Equip/Mat	Equipment Hours	Units - Grand Total	Estimated Units	Unit Cost	Total Cost	Grand Total Cost	Estima
	Equipment	V-1252	1.00	1.00	0.00	23.000	23.00	23.00	

Work Order Resources - Contractors

Resource Type Text	Emp/Equip/Mat	Alt Description	Department Text	Unit of Measure Text	Default Unit Cost	Hours or Quantity	Units - Grand Total	E
--------------------	---------------	-----------------	-----------------	----------------------	-------------------	-------------------	---------------------	---

Work Order Resources - Employees

Resource Type Text	Emp/Equip/Mat	Department Text	Unit of Measure Text	Hours or Quantity	Regular Time Hours	Overtime Hours	Units - Grand Total
Employee	806	Collection System	Hours	0.00	1.00	0.00	1.00



Questions?

- Contact Info

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859-547-1655

jbiedenbender@sd1.org