TRAINING GUIDE

Lucity Web

End User Training

Web Application End-User Training

In this booklet, we will introduce you to the Lucity Web application. The Web system allows you to utilize customized views, forms, grids, and menus. You will use the forms to view, add, and edit data. In addition, the web application has a dashboard feature that makes organizing and retrieving data quickly and easily. We will also introduce you to Asset and Work Management topics.

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Introduction to Asset Management

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

System Inventory

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

Field Inspection

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

Introduction to Work Management

The *Lucity*™ suite also offers you a comprehensive solution for Work Management. The *Lucity Work* modules allow 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. The Work Orders module allows you to schedule and track work tasks, personnel, equipment, and material usage.

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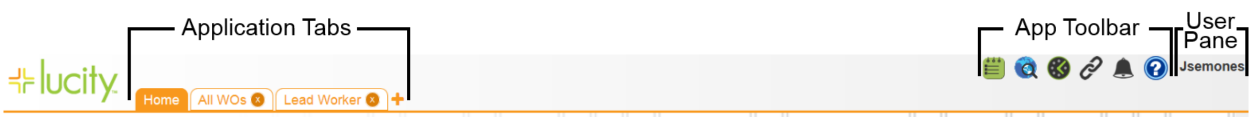
Web System Design

The ***Lucity Web*** interface enables users to quickly access information they need. It consists of several major components:

Component	Description
Application Tabs	Appear along the top of the application. Each tab represents an open Dashboard or view. Click on a tab to display its contents.
App Toolbar	Gives users quick access to a set of common tools, no matter what tab or Dashboard is open. It is located in the upper-left of the screen.
User Pane	Provides access to user information and system controls. Click on the user's name in the top-right corner of the screen to access the user pane.

Note: Click the ***Lucity*** logo in the upper-left of the screen to return to the ***Home*** tab.



Application Tabs

A row of tabs runs across the top of the ***Lucity Web*** interface. Each tab provides access to an open ***Dashboard*** or view. Click a tab to switch to it and display its contents.

Home Tab	Displays the current user's Dashboard. This tab cannot be closed.
Other Tabs	Display views into different modules and timesheets. Click the X to the right of a tab name to close that tab. Note: Administrators' tabs may also display other users' dashboards for review and editing.
+ Add Tab	Allows users to open another application tab. They can pick from a list of favorites, recently opened views, an organization-defined menu of views, or the modules menu.

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Application Toolbar

The Application Toolbar, located in the upper-right corner of the Lucity Web interface, gives users quick access to several Lucity tools and resources. It remains visible no matter what dashboard or view a user has open.

This toolbar cannot be customized; instead, a tool appears only when an agency chooses to implement it and gives a user access to it.

Icon	Tool	Description
	Work Scheduler	Enables users to view and manage ***Work Orders*** using a calendar view. Launches in a new browser window.
	Web Map	Generates a map that displays ***Lucity*** data geographically. Launches in a new browser window.
	Time Sheet	Enables users to track the time they spend on various work tasks. If multiple time sheets are available to a user, a drop-down list appears.
	Links	Displays a list of links to web content outside ***Lucity Web***. An administrator can customize the list for an individual or a group.
	Notifications	Shows all of the notifications the user has received from the system during the current session. Most often, these notifications advise the user of completed ***Tasks*** or ***Toolkit*** processes. The number displayed over the icon indicates how many notifications exist. Click the **X** next to a notification to dismiss it.

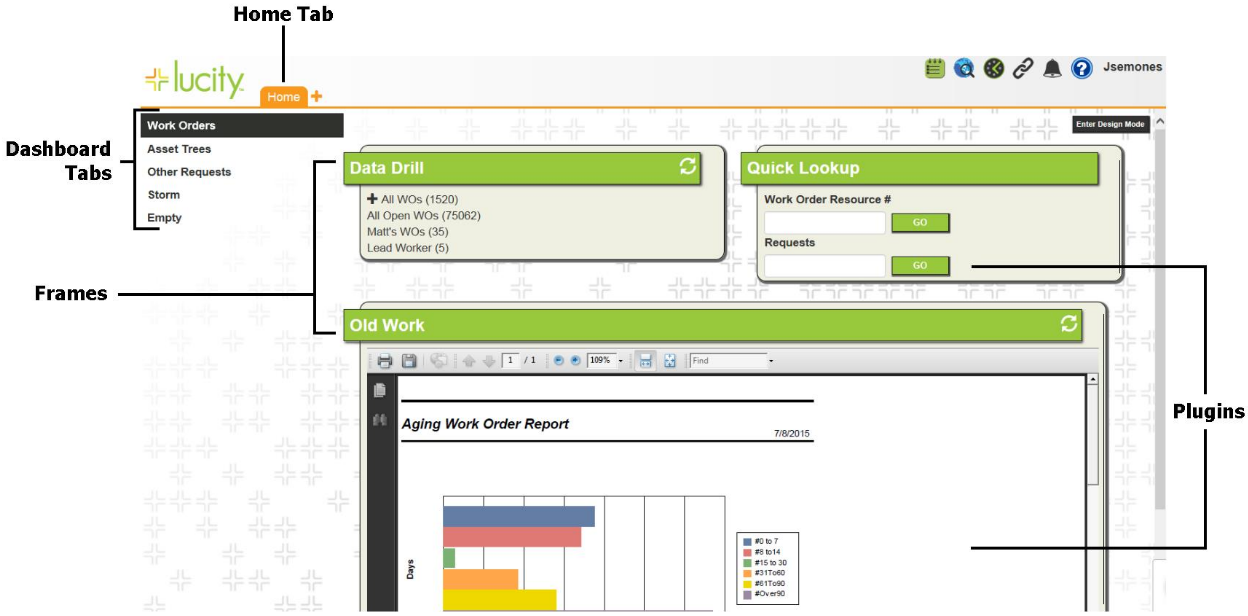
	Help	The **Help** icon provides access to several help options, including:
		• **Lucity Help** - Opens the ***Lucity Web Help Guide***.
		• **Lucity Help Portal and Search** - Launches the ***Lucity Help Portal***, which allows users to view/search all of the ***Help Guides***.
		• **About Lucity** - Displays the current product version and service pack.
		• **E-mail Support** - Initiates an email to ***Lucity Support***.
		• **Lucity on the Web** - Choose (drop-down) among xxx, including:
		    ○ the ***Lucity Support Center*** [instructive articles, YouTube videos, and a user forum]
		    ○ a WebEx support session, or
		    ○ Lucity.com.

Dashboards

Unlike the desktop, the web allows for the creation of a customizable dashboard for each user or group of users. Your dashboard can always be accessed by clicking the Home tab. The dashboard is customizable by your Lucity administrator. The Dashboard is a page that appears immediately upon logging into the web application. It contains overview data that users can use to identify questions they would like answered and to quickly jump to a more detailed view of that data. The Dashboard screen is made up of several elements:

Tabs	A tab helps organize data elements that are displayed whenever the dashboard is loaded. One user can have an unlimited number of tabs. The user's tabs are listed down the left hand side of the screen. Clicking on a tab in that list will display the frames and plugins that tab holds.
Frames	A frame is a space that helps organize the dashboard and contains plugins.
Plugins	Plugins are stored in frames and are what actually display data. There are 4 standard types of plugins that are available for use on the web dashboard: Asset Hierarchy Tree, Data Drill, Report, and RSS Feed.

Here is a sample of a dashboard with the components labeled:



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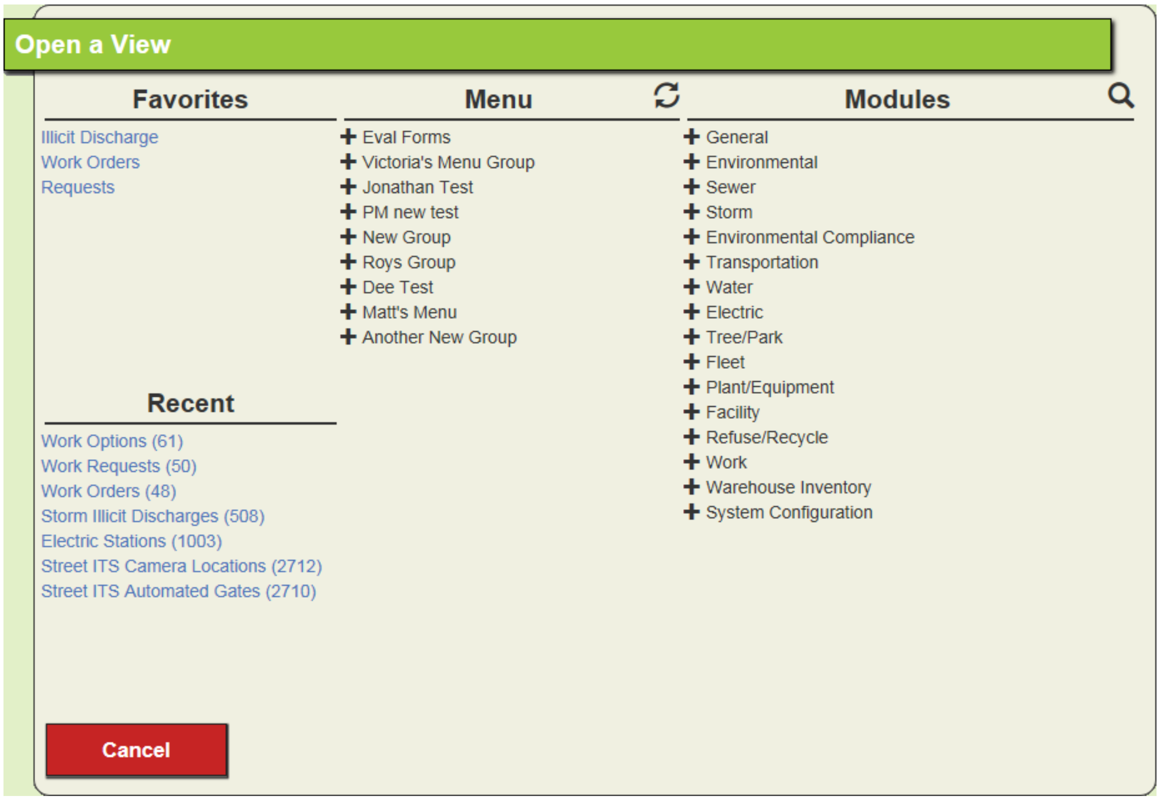
Modules

Besides the dashboard, modules can be accessed by pressing the + button on the next to the application tabs. This displays a list of the module views you have marked as a Favorite, your agencies custom Menu, your Recent modules and the Modules menu.



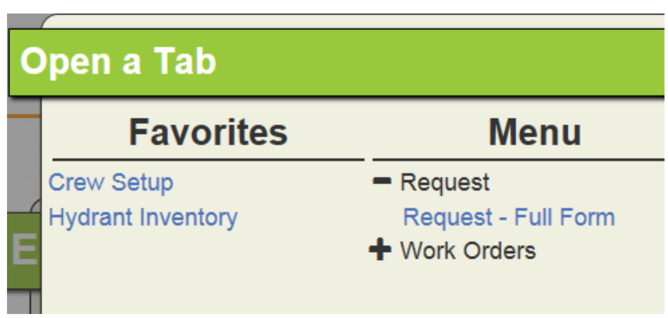
Module Menu

The modules menu provides a list of all the Lucity modules that your agency owns will be available for selection. When a module is opened from this menu, the module's default View will open.

Custom Menu

The custom menu found provides a list of customizable drop down menus. These menus can be setup with any view and Request Submittal forms. Menus are displayed in a collapsible, tree-view format and are customizable by your administrator. To access a custom menu, click the + button, go to the **Menu** section, select a menu group, and then select the desired view/form. The views will be opened in the web application and the forms will be launched in a new window. These customized menus are accessible by other users.

Here is an example of a custom menu called "Request – Full Form" that shows views and forms that may be needed by the person receiving the request:



Favorites

Once a View is opened, it can be marked as a "Favorite". Request Submittal forms may also be marked as "Favorites" for a quicker way to create Requests. A View/Form marked as a "Favorites" can be accessed easily by clicking on the "Favorites" tab and selecting the view/form. The "Favorites" will be available only to the user currently logged onto the web application.

To set and remove a view as a favorite:

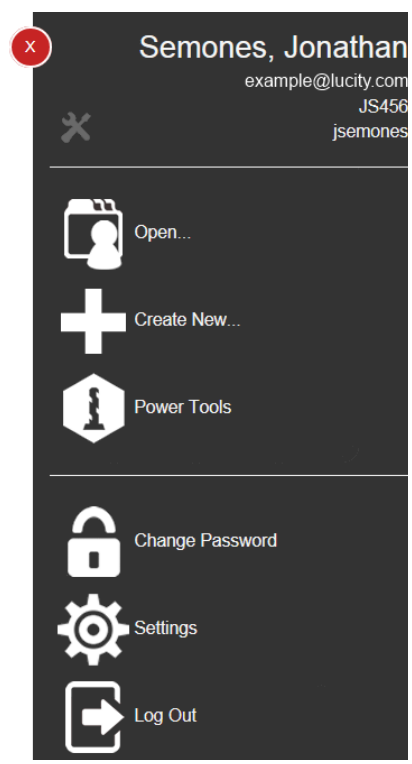
1. Open the desired view or Request form.
2. Click the star ☆ in the upper left hand corner of the screen.
3. The star will now be yellow and the view/form will be displayed under the Favorites tab.
4. Clicking on this link will open the view or form.
5. Click the star again to take it off the Favorites tab.

Open Application Tabs

The "Open Views" tab will provide a list of all the views that are currently open in the web application. Clicking on the tab and then selecting an open view will display it again. Views can be closed from this tab by clicking the **X** on the view in the tab.

User Controls

The user controls are found in the top right corner of the screen and appear under the user Login ID. When the ID is clicked, users are shown some information about themselves and are given the option to **Logout**, **Change Password, or View Notification Log**.



Note: The Open, Create New, and Power Tools buttons only appear for Admin users.

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Lucity Web Definitions

The Lucity Web modules are made up of three main components: Views, Grids, and Forms. We've described these components below.

Views

1. **Views** dictate the overall structure of the online experience and display data in Grid format. A view can contain a parent grid as well as child grids (these are like the parent modules and child records in the desktop application). When a module is first selected from the dashboard or modules menu, it will open in a view.

Grids

2. **Grids** are individual components within the Views and may display multiple records that can be easily filtered. They also allow you to view parent and child relationships. For example, in Water Hydrants, there may be parent Hydrant records that contain child Inspection information. In the Work Orders module, there may be parent Work Order records that contain child Tasks and Tracking information, and Tasks that contain child Resource information. The Request module's view may have a parent grid that contains child grids for Requestors, Comments, or Tracking information. Other inventory modules can be arranged in a similar manner. Most grids can then have a form associated with it.

Forms

3. **Forms** are used for adding new records, editing existing records, or viewing details about a single object. Forms can be customized to show all or only certain fields. Forms are launched in a separate browser window. These forms may be tied to a grid, or used alone as Request Submittal forms. Forms open when adding and editing records.

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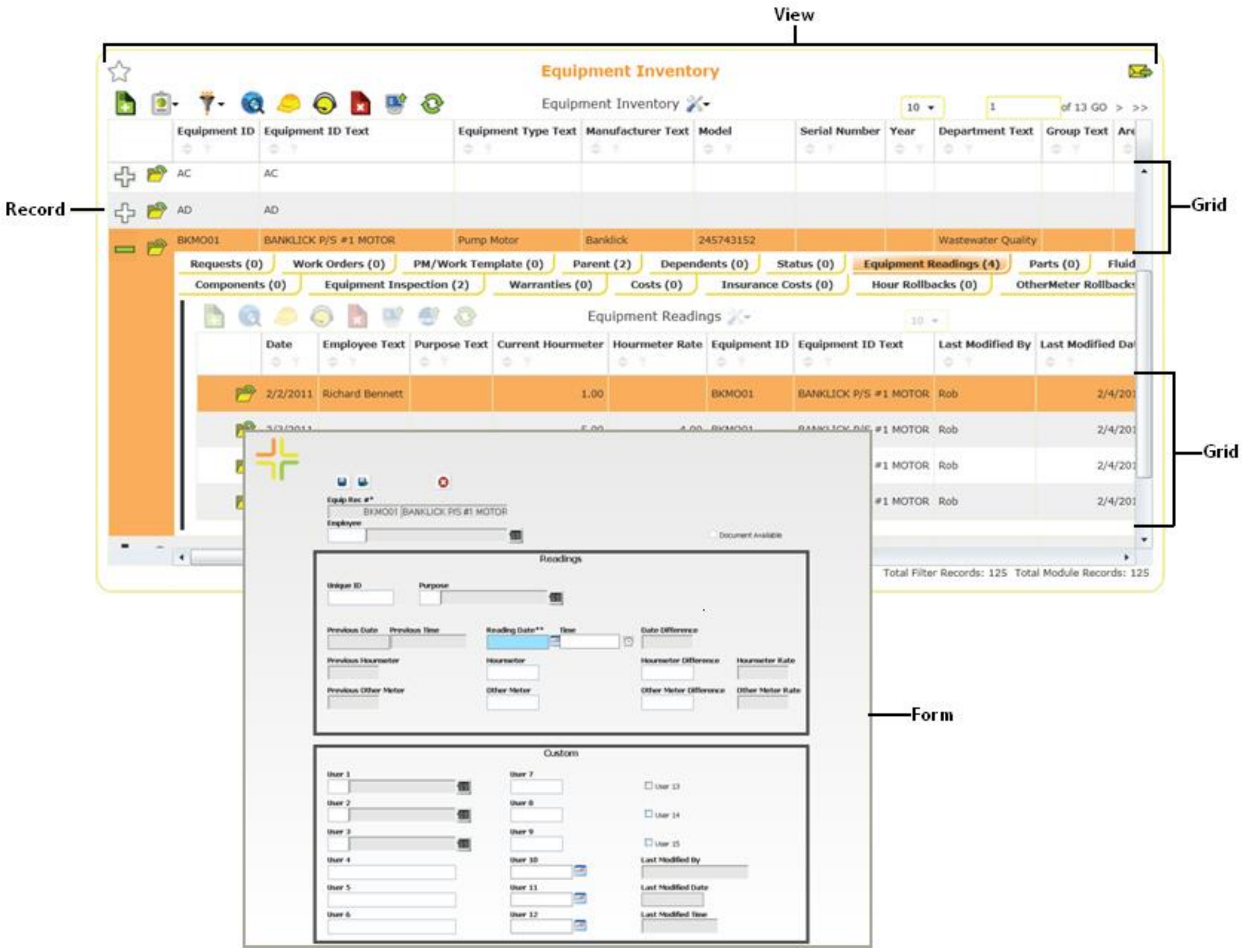

Custom Views, Grids, and Forms

Almost everything in the web interface is customizable. This allows administrators to setup anything from a generalized web experience for everybody or a specialized web experience for each group of users. The examples shown in this guide will cover some of that experience, but your agency's web setup might be very different. For questions about your specific web setup, please talk to your administrator.

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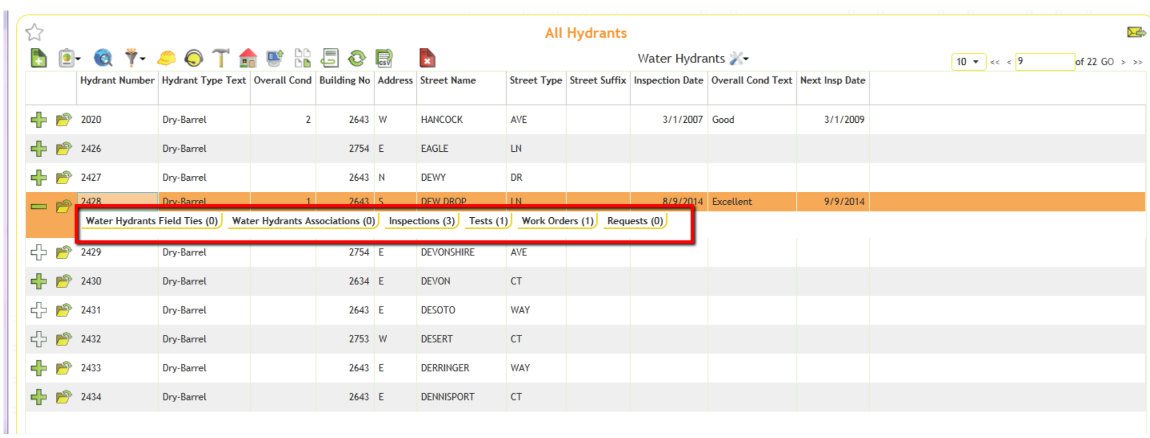
Sample Hydrant Inventory View

Below, we've provided an example of an online Hydrant Inventory View in Grid format. As you can see, this particular View displays 10 Hydrant records on the first page, out of 22 total pages of data. The data is displayed in columns that have been customized by the system administrator. This arrangement allows you to quickly and easily find the records you're looking for. The buttons above the grid allow you to add records, navigate through the record set, filter for specific records, and access reports, among other functions.

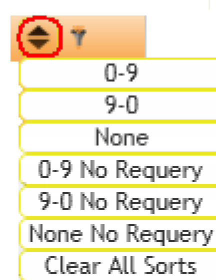
Using the View

The View can display multiple parent and child records in grid format. In our sample Hydrant Inventory View, there are a number of parent Hydrant records.

In the example below, the main Hydrant Inventory grid contains six child grids: Field Ties, Associations, Inspections, Tests, Work Orders, and Requests. The number of child records in each grid appears besides the name and can vary for each parent record.

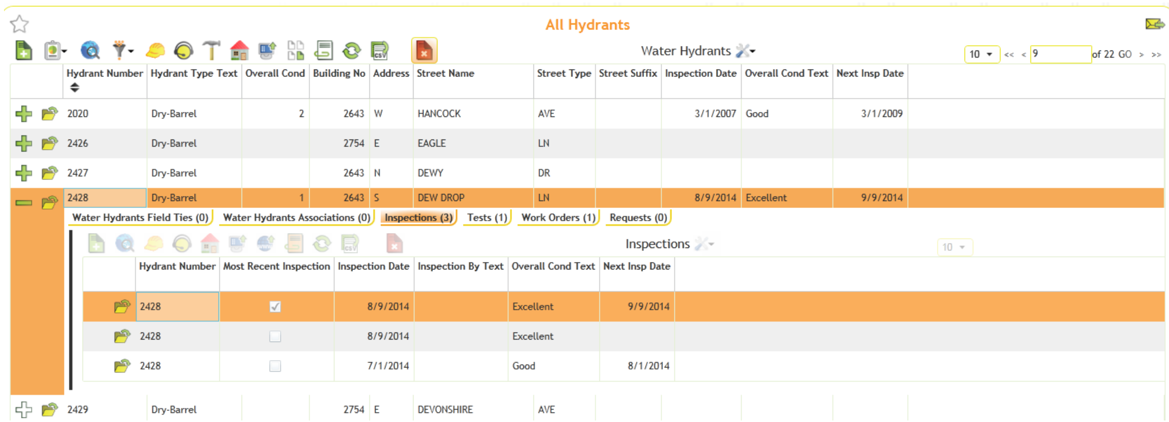


You can sort information in the View by clicking the double arrow beside the Column Filter buttons. There you'll see options to sort by ascending or descending order. The System will support multiple column sorts at a time. You can also stretch column widths to see the entire text of a cell.



Using the Grids

The parent grids can display multiple child records in grid format. The types of child records included can be customized by your system administrator. You can click on each type of child record (i.e. Hydrant Inspections, Work Orders, etc.) to access the available child grids. In the example below, the Hydrant Inspection child grid contains three child records. These child grid rows each display an individual Inspection record.



Next to each record in a grid two buttons may appear:

Click the plus sign  next to each record to access the available child grids. If the plus sign is green, the record has a child record. The plus sign will be white if the record does not have a child record. The number of child records found in each grid type is displayed in parentheses beside the grid name.

Click the folder sign  next to each record to open that record in a Form. This allows you to see more detailed information. Most forms also allow users to edit attribute information for a record. A form must be configured by your Lucity administrator in order for is folder sign to appear.

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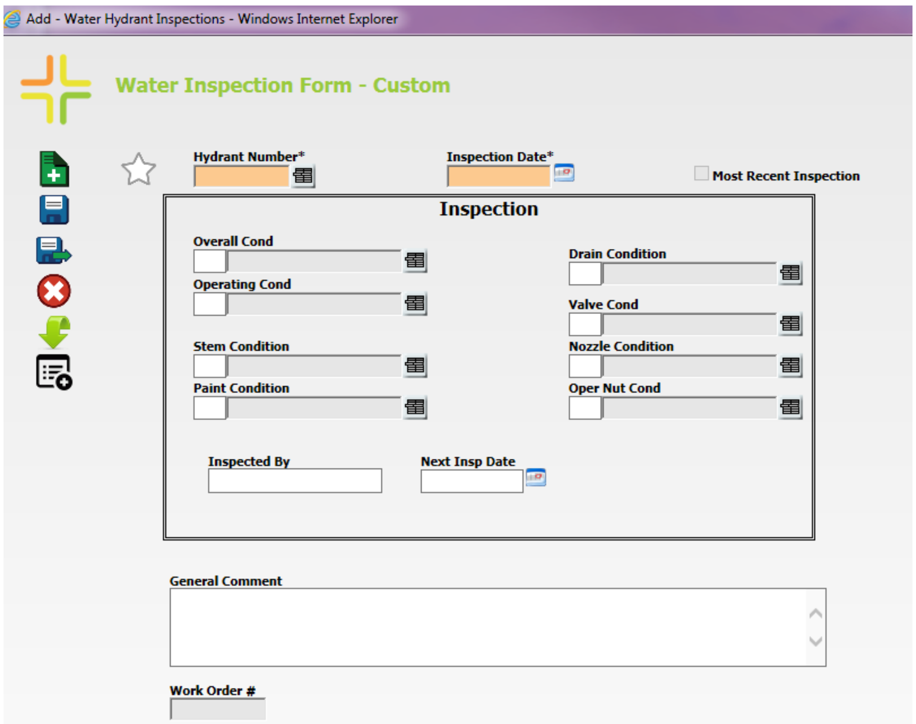
Using the Forms

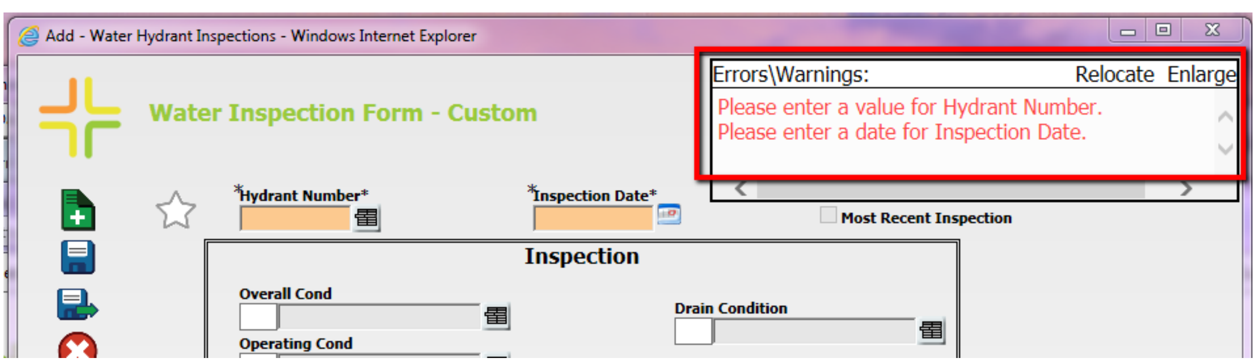
Each grid may have a form associated with it that allows for adding, editing, and viewing details about records. By clicking on a listing in the grid, you can access the Forms. Each form will be launched in a separate browser window. These forms can be customized by your administrator and can have different fields available. Changes made to the values in the fields on these forms will also be reflected in your desktop application, mobile applications that are online, and possibly GIS.

You can navigate through the fields on the form by using the Enter key (read-only fields will be automatically skipped). Or, click with your mouse in the desired fields. You can also use key combinations of Shift + Enter to cycle backwards through the fields.

The forms can be customized to display only the fields that are pertinent to your agency as in this custom inspection form:



Within a form, the required fields will be highlighted in orange and have an asterisk by them. If data is not entered in the required fields, messages will appear in the Errors/Warnings box upon attempting to save the record:

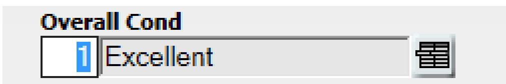
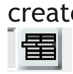
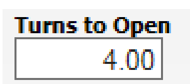
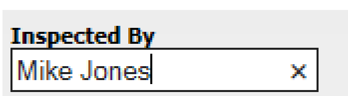
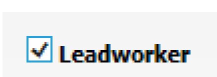
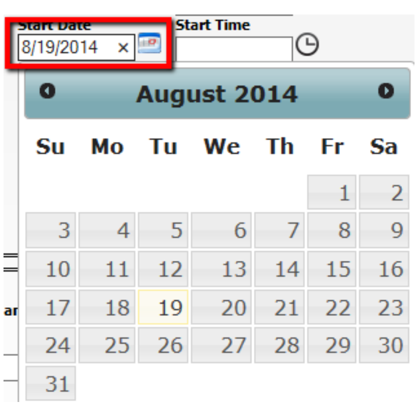


Your security settings may limit who can add, edit, and delete records.

Using the Fields

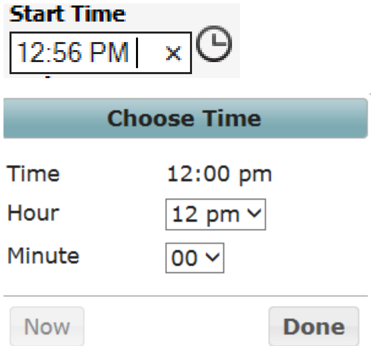
Field Types

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 examples of some of the main field types are 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=Excellent, 2=Good, 3=Fair, etc. The number 1 would go in the first field and the description "Excellent" would automatically appear in the second field. The codes and descriptions are created and then accessed through a picklist button  .
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. To automatically enter the current date, hit the space bar while your cursor is in the field. You can also use the date-picker button  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.

<table>
<tr>
<td>

Time Fields



</td>
<td>Time fields can be manually or automatically entered. To automatically enter the current time, hit the space bar. You can also use the time-picker button  to select the time from a time dialog.</td>
</tr>
<tr>
<td>

Comment Fields

</td>
<td>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.</td>
</tr>
</table>

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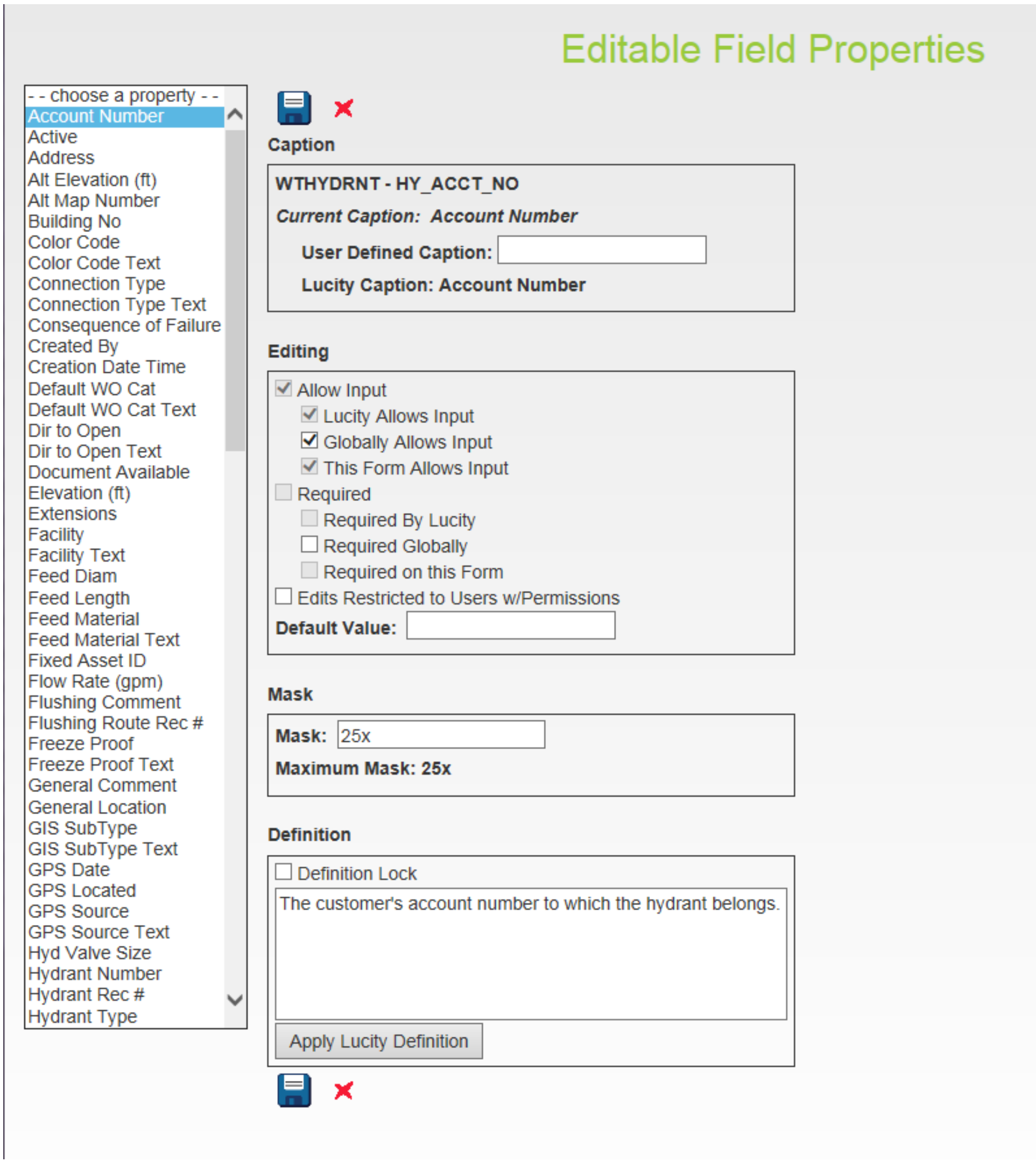
Field Properties

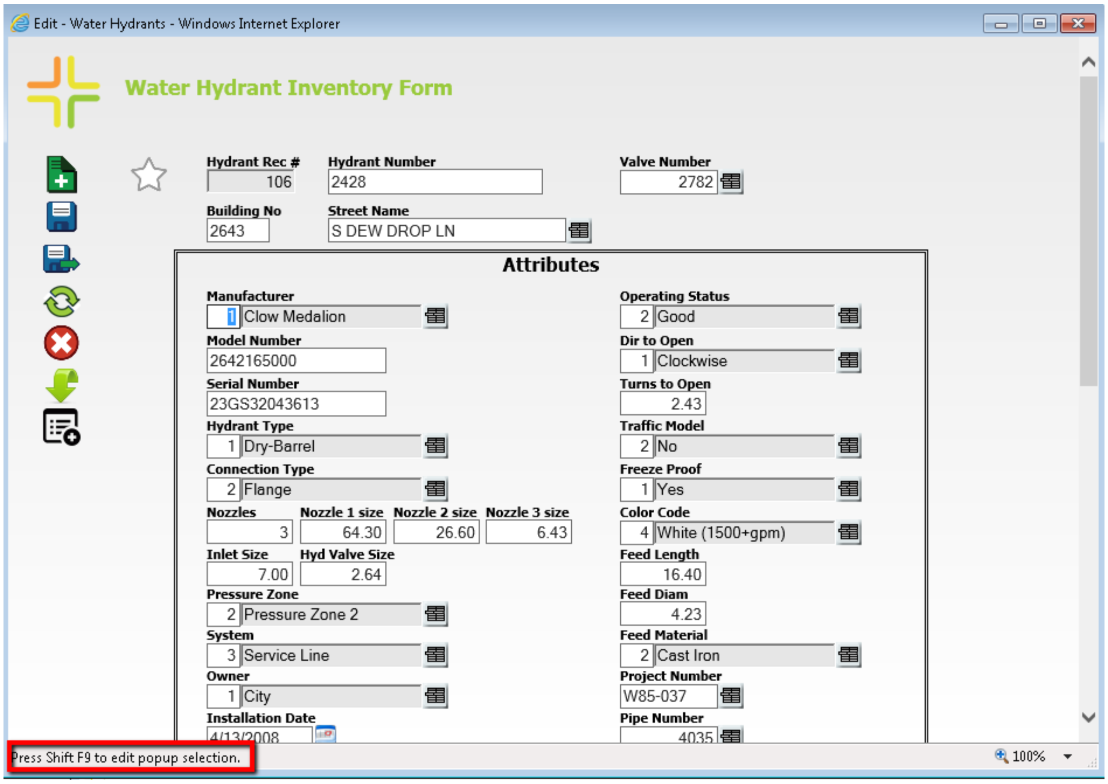
Like the desktop, each record contains fields of various data types and captions. To view and change the field properties and definitions on the web, you will need to first open a form and then click on the Field Properties button. The field properties enable the user to set properties such as making a field required and setting the mask.

Here's an example of field properties on the web in Hydrant Inventory:



Field Instructions

Some fields may have special function keys that are only applicable to that field. A short instruction would display on the status bar. For example, a Shift+F9 instruction appears for the code/type fields when the user has been given security permission to add, edit, or delete items in the list:



Some fields also allow you to use the F5 key to copy a value from one field to another. Some examples of these are listed below:

- 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.

Using the Toolbar Buttons

The toolbar on top of the Views' grids and on some child grids contains buttons that access or perform a variety of standard program functions. Many of these functions are similar to those found in your desktop application. Place your mouse over each icon to see the name/function of that particular toolbar button. Many of the buttons in the Views' grids are customizable on the web so they would not appear if the function is not desired. The following list contains a brief description of each button.

Icon	Name	Function
	***Add***	Adds a new record. Launches a new window with the Detail Form for the highlighted record type on the web page.

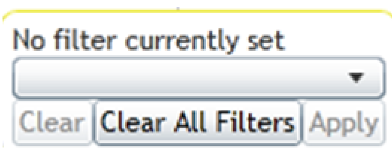
	Reports	Opens the Reports dialog. These include your organization's custom reports as well as the standard Lucity reports.
	Show in Map	Opens either a web map or your ArcMap project. Zooms in and selects all assets, X/Y coordinates, and/or addresses found in the selected Work Order, Request, or child dialog.
	Filter	Narrows your search for a specific record or set of records. Allows for creation of standard or advanced filters.
	Create Work Order*	Generates a Work Order for the highlighted or filtered Request, Inventory, or Inspection records. This button can create a Work Order for all records resulting in one Work Order or one separate Work Order for each record.
	Create Request*	Generates a work Request for the highlighted inventory records.
	Create PM/Template	Generates a work Pm/Template for the highlighted inventory records.
	Property Viewer	This tool shows relationships between the selected record and records in other modules based on address.
	Launch in Desktop	Opens the selected record(s) in the Desktop application.
	Refresh	Refreshes the display.
	Export Current View	Allows users to export the data in the current grid into a csv file which is then emailed to them.
	Delete	Deletes all selected records. A warning prompt will appear.
	Toolkit	Opens the Toolkit dialog. Toolkit functions vary by module.
	Attach an Existing Record	Attaches an existing record to the selected parent record.
	Detach Selected Records	Detaches the record from its parent record. This option does not delete the record from the database.
	Open in another View	Opens the selected data in a new view in the web application. Allows for quick opening of data in a child grid into the full view.
	Subsets	This tool allows users to save a group of records for later use. This can also be used to modify saved subsets.
	Documents	This tool allows users to upload and attach documents to a record and then to view those attached documents. The button will display in orange if the record has a document/file attached to it.
	Editable Grids	This tool is only in the Work Order module. It opens up a page that displays grids of work order resources for a task. The values in the grids can be edited quickly. **Work Order Toolbar** – Click it there to open the resources related to the first task in the Task list. **Work Order > Tasks Toolbar** – Click it to open the resources for the task currently selected in the task list.

**Note: When you create a new work order or request, the system will open the corresponding default view in a new tab if a default view exists. If it does not exist, the work order or request will still be created in the database but will not appear on screen. Instead, a notation will appear indicating that the operation succeeded.*

Column Filter

Like the desktop ***Locate*** tool, this web tool helps locate records. Unlike the desktop tool that brings the user to the located record, however, the Column Filter displays the records to the user based on values in the column. The system also supports multiple column filters at a time. To use the Column Filter tool on the Web application, follow these steps:

1. Column Filters are found at the top of each column on the Grid. Click the  button at the top of the column to make the column filter dialog appear:



2. Choose the way in which you would like to search for data. The drop-down list may contain one or more of the following choices based on the type of data in each column:
   - Starts With/Does Not Start With
   - Ends With/Does Not End With
   - Contains/Does Not Contain
   - Between
   - Equal/Not Equal
   - Is Empty/Is Not Empty
   - Greater Than/Greater Than or Equal
   - Less Than/Less Than or Equal
3. You can then enter the data you would like to search for in the second field and click *Apply*. The tool will display only the records matching your criteria.
   - If using the column filter tool on multiple columns at a time, each additional column filter criteria will serve to further limit the records displayed.
   - For example, in Hydrant Inventory, you could set a column filter on Hydrant Number starting with “24” and Street Name Starting with “DE”. This would return only those records that meet both criteria.
4. After you have defined column filter criteria for a column, the column filter icon will be highlighted . Click the filter icon showing on top of the column to display the current settings.
5. To remove one column filter criteria, click on the column filter icon and select ***Clear***. To remove all column filter criteria, click on the column filter icon and select ***Clear All Filters***.

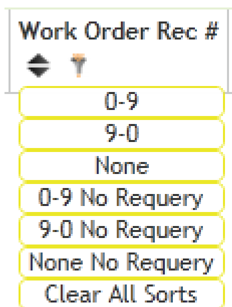
Column Sorting

In the column header at the top of every column there is a sort button. This allows users to sort the data in the grid based on this column. The grid also allows users to sort on multiple columns at the same time.

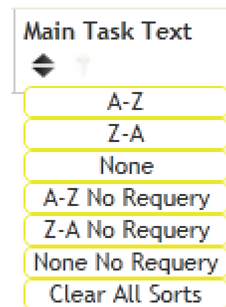
How to Sort a Column

1. Select a column to sort.
2. Click on the sort button to view sorting options.
3. Select the desired sorting option and the column will be sorted.

Number Sort



Text Sort

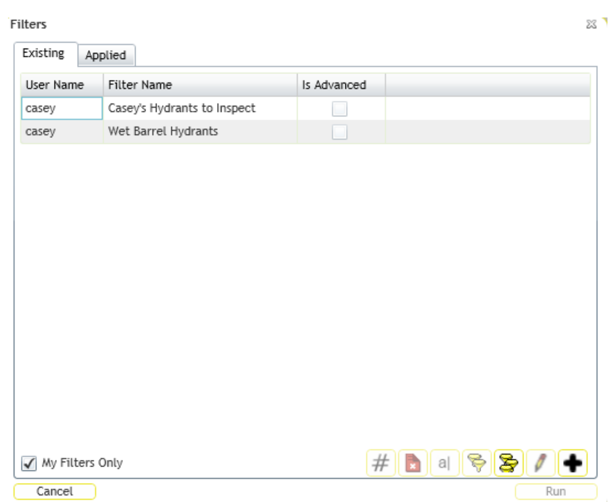


4. Clear the sort for a single column and make the records go back to the default sort order for that column by choosing ***None***. Clear the sort for all columns by choosing ***Clear All Sorts***.

5. Select the ***Save My Customizations tool*** to save any sorts.

Filters

A Filter helps you narrow your search for a specific record or set of records. When you click the Filter button, the Filter dialog will appear. It contains existing (saved) filters as well as a tool to create new filters.



1. You can check the "My Filters Only" box to display only filters created by the user logged into the application. To display filters created by other users, uncheck this box.

2. To use an existing filter, highlight a filter name and click *Run Filter*. The filtered record set will be loaded onto the web page.

3. To delete an existing filter, highlight a filter name and click the delete button .

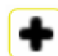
4. To display the number of records that a certain filter will return, highlight a filter name and then click the *Count* button . The number of records will be displayed in a separate dialog.

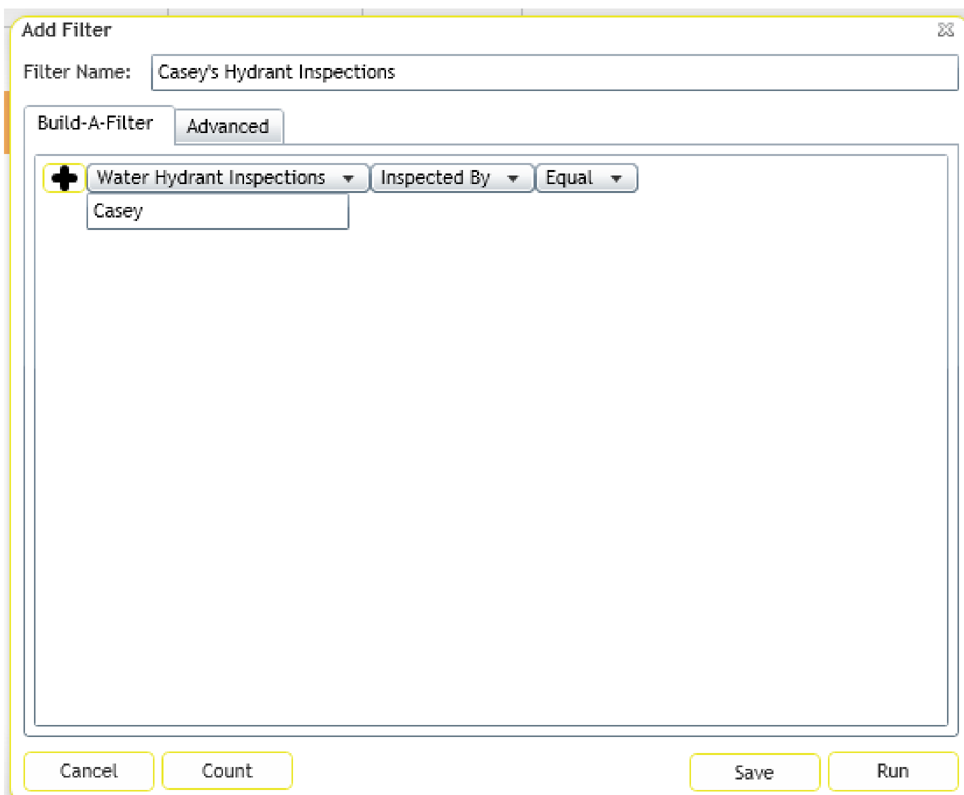
5. The change the filter name, highlight a filter and click the Rename button . A dialog will appear prompting you to change the name.

6. To copy the filter, highlight a filter and click the Copy Filter button . A dialog will appear allowing you to edit and save the copied filter.

7. To edit a filter, highlight a filter and click the Edit button . The Edit Filter Dialog will open.

Standard Filters

1. To add a standard filter, click the add button  and you can complete the options in the ***Build-a-Filter*** tab:



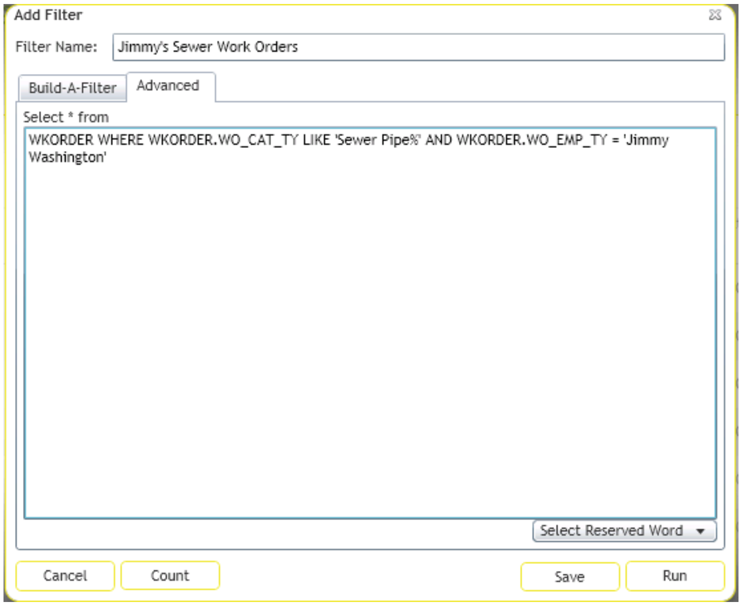
- Use the second drop-down list to select the field by which your records will be filtered. This list contains nearly all of the fields in the Lucity database, including Memo (Comment) fields.
- After selecting a field from the second list, a third drop-down list will appear. This list contains the following filter modifiers:
    - Starts With/Does Not Start With
    - Ends With/Does Not End With
    - Contains/Does Not Contain
    - Equal/Not Equal
    - Is Empty/Is Not Empty
    - Greater Than/Greater Than or Equal
    - Less Than/Less Than or Equal
    - True/False
    - Between
- In the blank field that appears, enter the specific field content you are filtering for.
- If you'd like to add an additional field to the filter, click the big plus sign button. You'll then repeat the above process with additional drop-down lists, allowing you to select a new field and define filter criteria. Each different field creates an "And" statement and serves to further limit the filterset.
- If you add the same field multiple times to the filter, it creates an "Or" statement.
    - For example, if you include the following in your filter: Inspected By "Casey", Inspection By "Mike". The resulting filterset will include all inspection records inspected by either "Casey" or "Mike".
- To remove a filter field, click the big minus button.
- If you'd like to save the filter, enter a unique filter name and click the *Save* button. This filter will then be available for use at a later time.
- Click *Run* when you have finished building your filter. The new filtered dataset will appear.

Notes:____

Advanced Filters

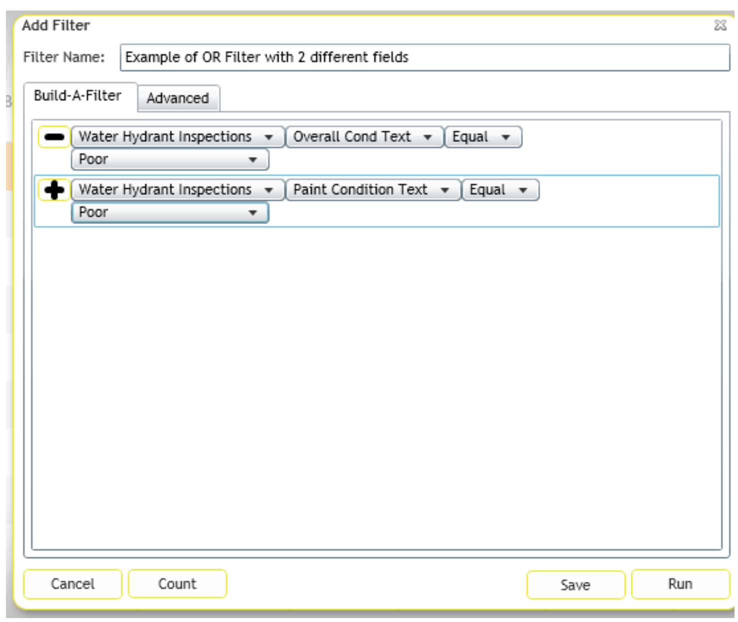
The Filter dialog also contains an Advanced Filter tab. If a standard filter will not provide the necessary results, it is possible to use an advanced filter to query for specific records. You should have a working knowledge of SQL Query Syntax before attempting to use Advanced Filters. For most users, the Build-A-Filter screen will be sufficient.

4. For advanced queries, use the window provided in the Advanced tab to enter or modify the SQL Statement:

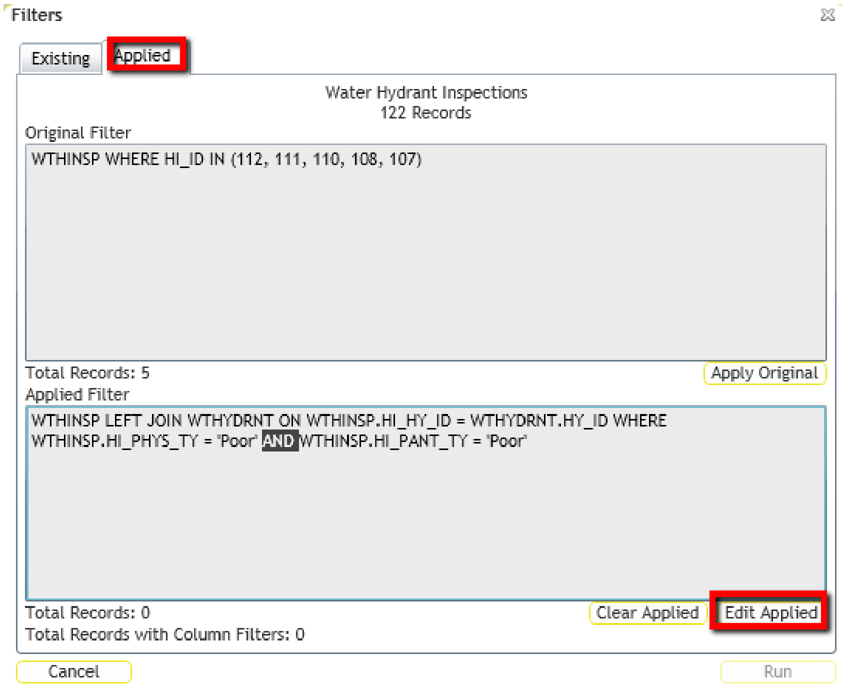


5. Click the *Count* button to check the query syntax and determine how many records will be returned.

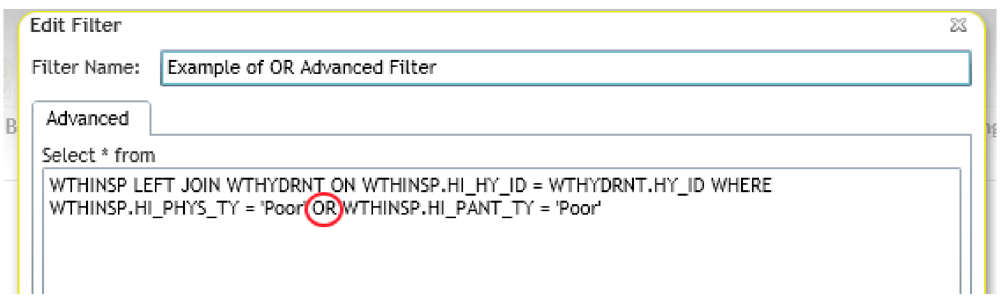
- One type of an advanced query is when you need a multi-field filter with an OR condition instead of the default AND condition. You can first start with the standard filter in the Build-a-Filter screen showing both fields and then edit the word AND in the Advanced filter dialog.
  - For example, you may want a filter for inspections that have either a poor Overall Condition OR a poor Paint Condition. You can first start with this standard query:
  - Click Run. You will have 0 records in your result set because the system defaulted to an AND instead of an OR.
  - After clicking Run, click the Filter button again.
  -



- Click the ***Applied*** tab and then ***Edit Applied***:



- Change the word AND to OR:



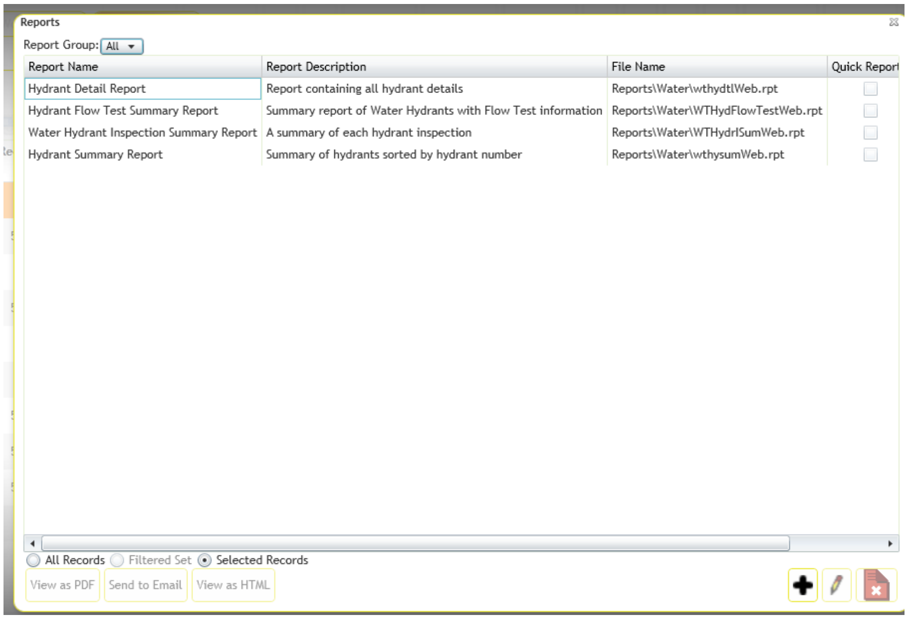
- Click Run to run the query.

Notes:____

Reports

Like the desktop, the web allows the user to run reports in each module. Follow the steps below to generate reports:

1. Click the Reports button to open the Reports dialog. The following is a list of Hydrant Inventory reports:

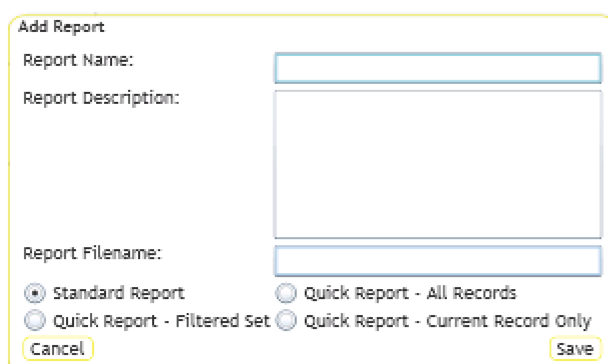


- This dialog displays each report by name. It also lists a brief description of each report, the report file name, and indicates whether the report is a Quick Report for the current user.
- Note that the reports listed here include your organization's custom reports as well as the standard Lucity reports.

2. To limit the record selection included in the report, use the radio buttons as follows:
   - **All Records** – The report will include all records in the module.
   - **Current Record Only** – The report will only include the information on the current record.
   - **Filtered Set** – The report will include all records in the current filtered set. *Note:* You cannot run reports on the Filtered Set if the Filter is created on a Comment field.

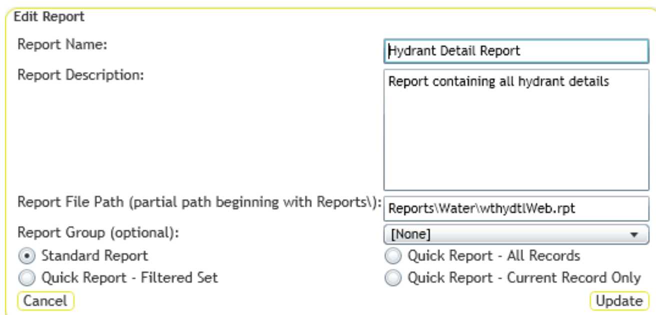
3. To view a report, highlight a report name and click *View PDF* or *View HTML*. The report will be displayed in a separate window. Note that PDF reports will be limited to 10 pages.

4. To add a new report, click *Add*. The following dialog will appear:



- Note that this dialog does not provide you with a way to upload reports. Reports must be posted to the web server in the \Reports directory in order to be available online. There you'll see sub-directories for \Equip\ and \Work\, other programs. Reports should be placed in the appropriate sub-directories. If you do not have access to the web server, consult your system administrator.
- Indicate the report name, description, file name, quick report status, and any limitation on the record set.
- Click *Save* when you are finished defining the report. It will be added to the reports list in the previous window.

5. To edit a report name, description, or designate a report as a Quick Report, highlight a report and click *Edit*. The following window will open:



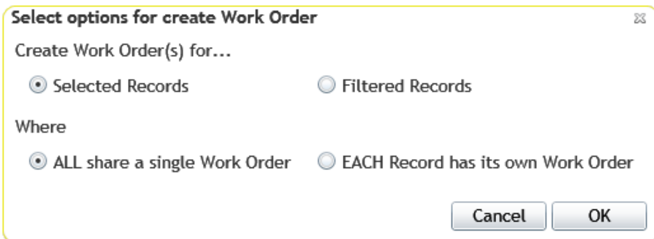
- Click *Save* when you have finished making your selections.
- Quick Reports are displayed in the drop-down menu besides the Reports button. To access a Quick Report, simply click on the report name and it will immediately open in a separate window. Quick Reports are generated as PDF reports and are limited to 10 pages.

Notes:____

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 can either create a work order(s) for the records currently selected in the grid or the entire filterset. It can also create one work order for all of the records, or create a separate work order for each record.

1. Go to the desired module and create a filterset or select the desired records in the grid.
2. Click the button on the toolbar.
3. The following popup will appear:



4. Choose whether the work order will be created against the **Selected Records** or against the entire set of **Filtered Records**.
    6. If there is more than one selected or filtered record the **Where** section will be visible.
5. Select whether all the records will share one work order or each record will get its own work order.
6. Click ***OK***. One or more work orders will be created based on the selections.

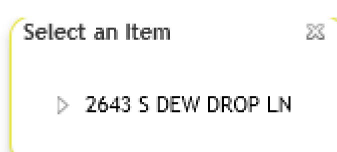
Property Viewer

The Property Viewer provides a list of records that share the same address as the current record.

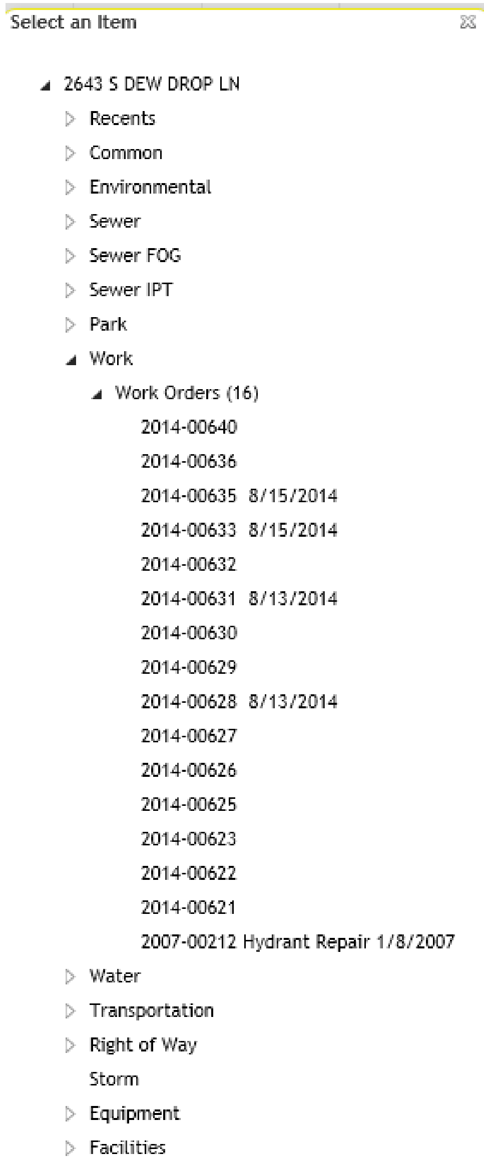
- If an arrow disappears and a section doesn't expand, there are no related records under that section
- The *Recents* section displays a collection of modules that are address-centric. The relationships under this are limited to the last years' worth of data and are ordered by date.
- When the tool is searching a work order to see if it contains related addresses, it searches through all the Location records for the work order.
- When the tool is launched from a work order, it looks for relationships to the first record in that work order's location grid.

How to View Related Records

1. Select a record in the grid. The Property Viewer will only work for one record at a time.
2. Click the Property Viewer button .
3. The tool will take the address entered on the current record and the following pop-up will appear with the address:



4. Click on the arrow button to expand the list of relationships for the address. Then continue to expand sections until the desired module is expanded.



5. A list of the related records will appear.
6. Click on a record to open that module.

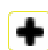
Launch Desktop Records

An additional feature in the web application allows you to highlight one or more rows in the grid and then click the *View Selected Record(s) in Desktop* button to open those records in the Desktop application. This allows you to quickly access records from the web interface.

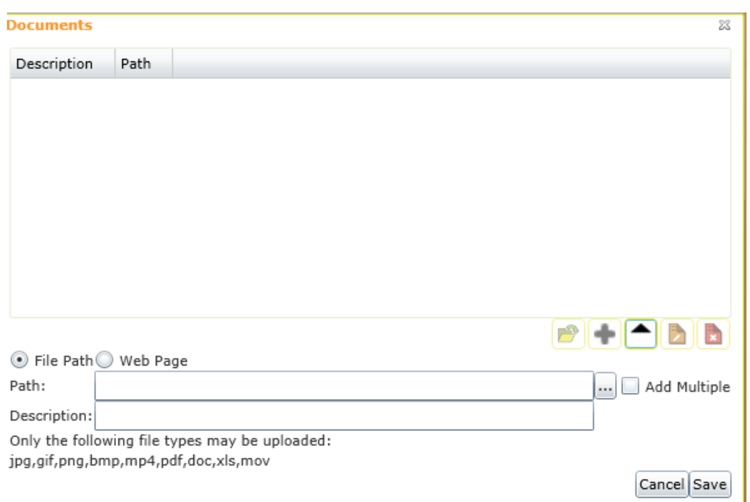
Document Control

This tool allows users add or view documents, images, videos, and/or URLs that are attached to an asset. This tool enables the user to 1) Add documents that are linked to records but may not be available to other users if the document is deleted or inaccessible, 2) Attach a web URL to a record, or 3) Upload a document to the server where it can be shared by other users even when access to the original document may not be available. To use this tool, select a record in the grid and then click the document button. The following window will appear:

- To open a document, select a document from the list and click the open button . The document will be opened by your computer's default program for opening that kind of document.
- Select one of the following two choices to Add or Upload:

1. To add a document, click the add button . When adding documents using the Add button, the document is only linked to the record 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.

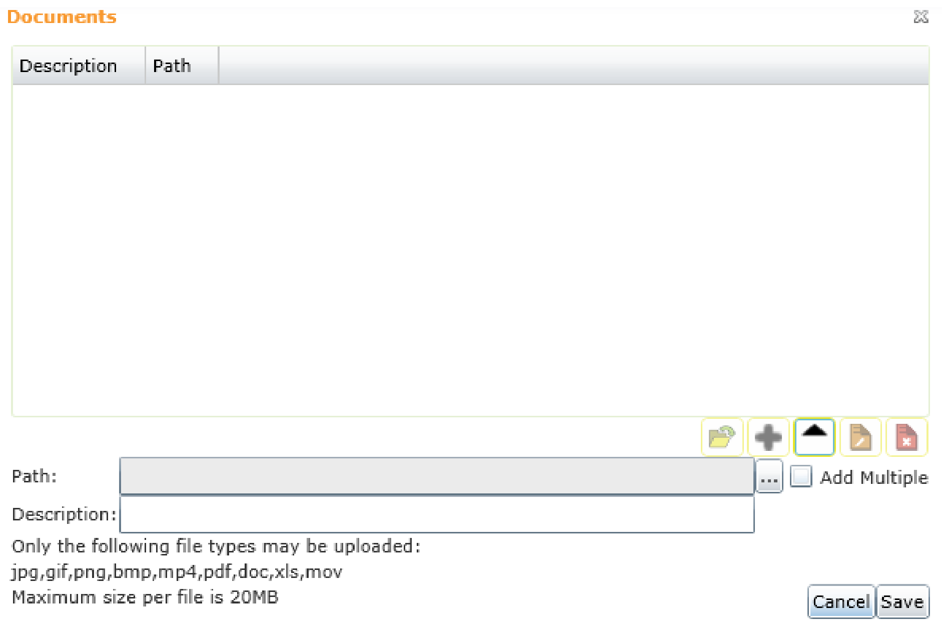
   The following dialog will open:



- To attach a web page, click the Web Page radio button and enter a URL and description.

2. To upload a document, click the upload  button. This button allows users to upload a document to the server and link it to the selected Lucity record. This feature allows the document to be available even if the original document was stored locally or if the network is not available where the original document was saved.

   The following dialog will open:

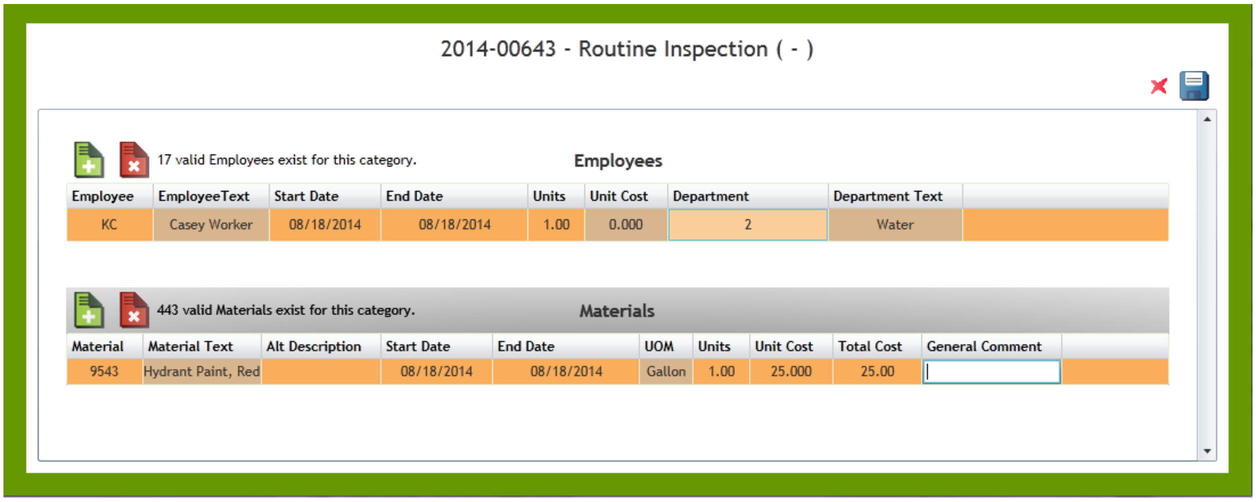


- Enter a Description and browse to the desired document.
- To select multiple documents check the Add multiple box first.
- When complete click Save.
- The allowable file types and maximum file size that can be added or uploaded are configurable by your administrator.

Notes:____

Editable Grids

The editable grid feature is only available for the Task child in Work Orders, and allows users to add resources to a work order task and edit multiple resources at once. To use this tool, go to a work order view or task grid and click the button. This button appears when there is at least one task in the work order. The editable grid page will open. There will be a grid for each type of work order resource that is available for that task.

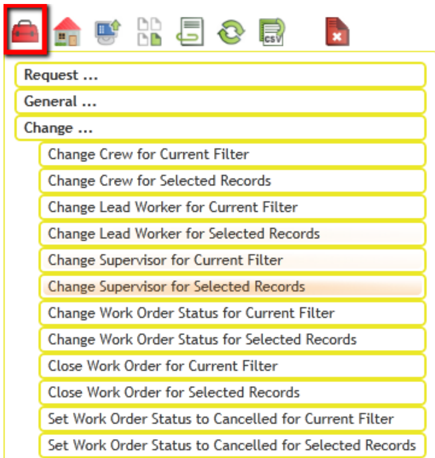


7. To add a resource, find the grid it should go in and click the add record button.
8. The system tells you above each resource grid how many valid resources are available for use based on the current WO category.
9. In the text fields that require a selection, you can start typing in letters or numbers that you would like to find and the system will filter based on those characters.
10. To edit a resource click in the field to edit and make changes.
11. You can use the arrow keys or Tab key to move through the fields in the grid.
12. To delete a resource select it in the grid and click the delete record button.
13. After making changes click the save button to save edits and close the grid. Choosing the cancel button will close the grid and return you to the work order view.

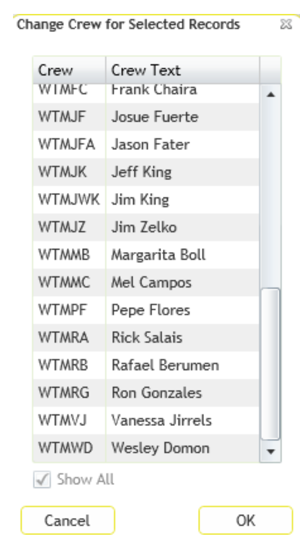
Notes:

Toolkit

Some Views and Grids will contain Toolkits. These Toolkits provide you with special functions designed for each module. For example, here's a portion of the toolkit functions in Work Orders:



1. To execute a Toolkit function, highlight one or multiple records in the grid or filter the records. Click on the Toolkit button and the Toolkit dialog will appear. Select the tool you would like to execute.
   - Different Toolkit options will be displayed based on the module and type of records highlighted. If a toolkit option is disabled, a message will appear giving a reason it is disabled when you hover your mouse over the option.
   - After selecting an option that you wish to execute, the tool's dialog may contain different editable fields based on the selected tool.
   - Some Toolkit operations are performed automatically; they require no other input from the user.
   - At this time, the Toolkits are not customizable.
2. Sometimes, another dialog will appear after selecting a tool that requests more information. For example, the "Change Crew for Selected Records" toolkit will show a dialog similar to the following that allows you to select a new crew:

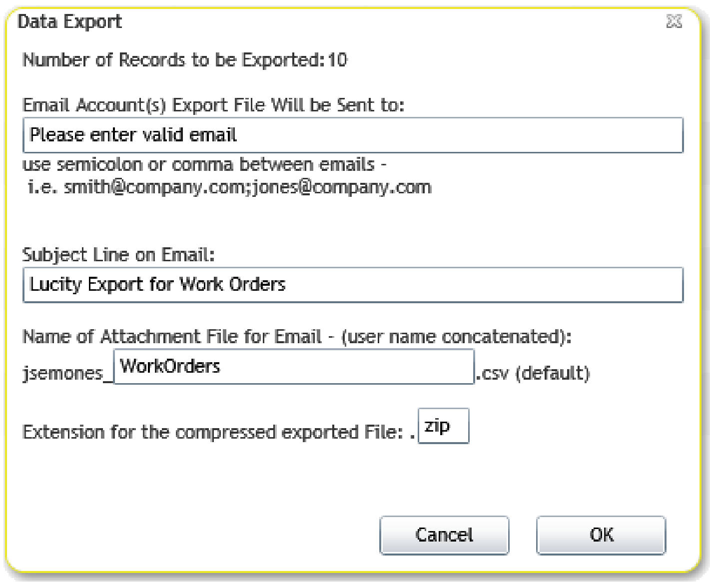


3. For Toolkit functions requiring user input, click *OK* when complete.

Export Current View

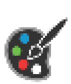
Sometimes it is useful to be able to get data out of Lucity. The export current view gives users this option. It exports the records in your current view or child grid into a .csv file, zips up the file, and then emails the file to a specified address.

1. Choose a module that you wish to export.
2. If desired, create a filter that displays the records to export.
3. Click the  button. The following pop-up will appear:

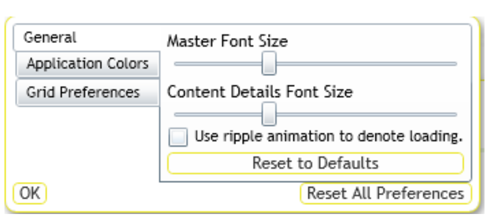


4. Fill out the ***Email Accounts*** field with one or more valid email addresses.
5. Change the other settings as desired.
6. Click ***OK***.
7. The data will be exported and emailed.

Preferences

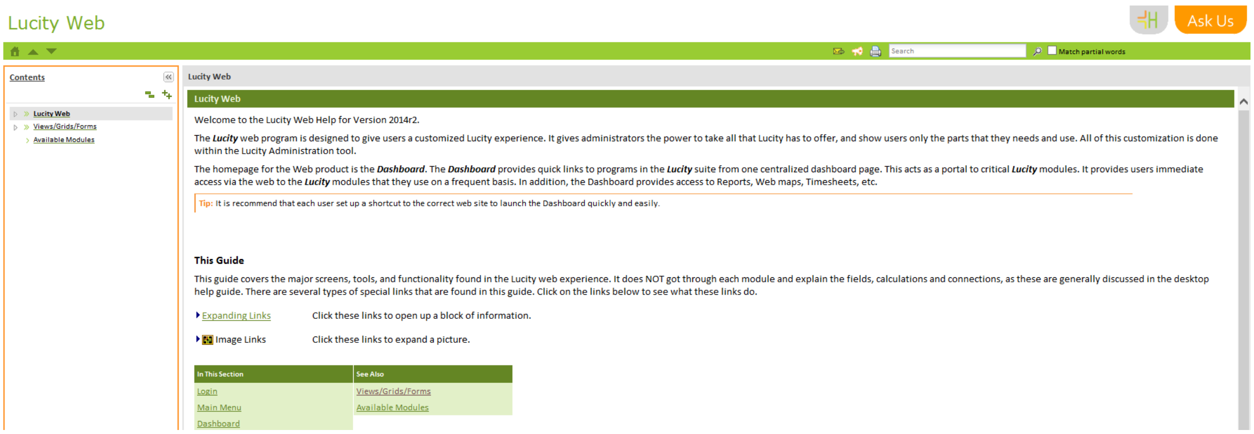


The Preferences button allows users to customize the web application's colors and font sizes. These are user-specific preferences. It is also possible to reset the preferences to the default settings. The Preferences button is available from the toolbar on the Home page.

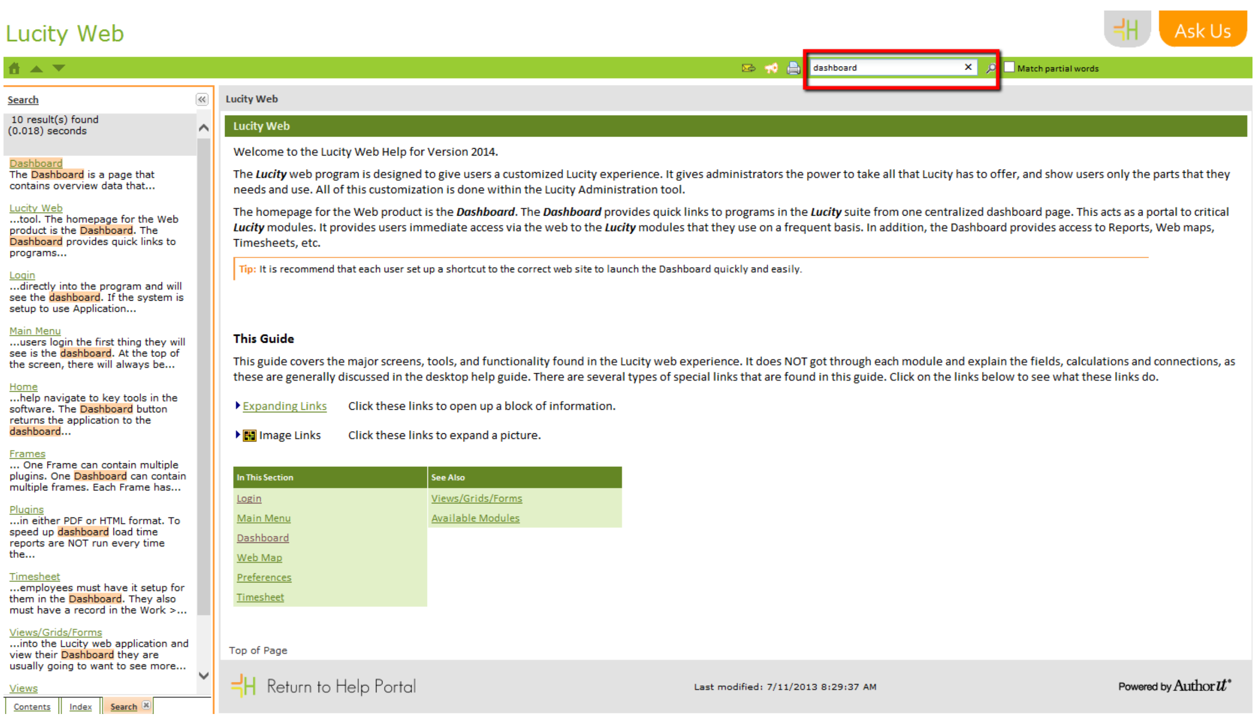


Help File

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 web application, click the Home menu, select the ***Help*** button, and then select ***Lucity Help***. The following should appear:



You can run custom searches using any search criteria. For example, to find information about "dashboards" in the web help file, type "dashboard" in the search field, and click the magnifying glass or hit <Enter> to search for the related help topics.



- Information about the modules can currently be found in the "Lucity Desktop" section.
- To view information about other applications and topics within the Lucity system, click the Help button in the upper right of the screen that will take you back to the main help page: