# Web Reports

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It is often helpful to develop reports for desktop first to see how all of the child grids interact and to gather field names.

Custom Reports that have been created for the desktop version of Lucity will **NOT** work in the Web application as is. Desktop reports must be converted for Web use.

### **Converting Desktop Reports for use in Lucity** Web

1. Make a copy of the report and add Web to the end of the report name. (Optional, yet helpful)

Example: Desktop report **WOSumAssetByCat.rpt** would be copied and renamed for the Web **WOSumAssetByCatWeb.rpt**.

- 2. The Web report would then be converted as follows.
- 3. Open the report in Crystal Reports.
- 4. Go to Database>>Set Datasource Location.
- 5. Within the lower box (*Replace with*: ) open *Create New Connection*.
- 6. Select OLE DB (ADO)

Set Datasource Location		22
Change the location of the data source by selecting the current database (or table) and choosing replace it with. Then click Update. Current Data Source:	) the database (o	rtable) to
GBAWork001		
Replace with:		
	E	Update
	Close	Help

7. You will then be prompted to select a provider. If you are using SQL Server use the Microsoft OLE DB Provider for SQL Server. For Oracle use Microsoft OLE DB Provider for Oracle.

OLE DB (ADO)		X
OLE DB Provider Select a provider from the	list or select a data link file.	
Provider:	Microsoft Office 12.0 Access Database Engi Microsoft OLE DB Provider for Analysis Servi Microsoft OLE DB Provider for Indexing Serv Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for Search Microsoft OLE DB Simple Provider Microsoft OLE DB Simple Provider Microso	
Use Data Link File:		
Microsoft Data Link File:		
< Back Next >	Finish Cancel Help	

- 8. Next, enter the Connection information.
  - For SQL Server, include the SQL Server Name, User ID, Password, and Database. Your Lucity Administrator should be able to provide this information. The Database is specific to the report database that it was created with such as GBAWork or GBAEquip.

Note: For 2015r2 post data unification it will be one database. The name will be whatever you have assigned the database (Default is Lucity).

OLE DB (ADO)	×
Connection Information Provide necessary inf	<b>n</b> omation to log on to the chosen data source.
Server:	BPINKSTON-LT\SQLEXPRESS
User ID:	LUCITY_USER
Password:	•••••
Database:	GBAWork 🗸
Integrated Security:	
< Back Ne:	xt > Finish Cancel Help

• For Oracle, include the Service, User ID, and Password.

OLE DB (ADO)	
Connection Information Provide necessary informati	ion to log on to the chosen data source.
Service:	MYINSTANCE
User ID:	GBA_USER
Password:	•••
< Back Next >	Finish Cancel Help
i but i	

9. Once you create a connection you will need to individually (manually) map **EVERY TABLE** from the report one at a time.

Set Datasource Location	X	3
Change the location of the data source by selecting the current database (or table) and choosing the database replace it with. Then click Update.	use (or table) to	
Current Data Source:		
Replace with:		
ODBC (RDO)     Olap     Ole DB (ADO)     Make New Connection     Make New Connection     GBPINKSTON-LT\SQLEXPRESS     GBAWork     GBAWork     GBAWork     GBAWork     GBAWork     GPTHHSYNCH     GPTHHSYNCH     GPTHHSYNCH     GPTHHSYNSTAT     GPTHHSYNSTAT     GPTIMPCONFIG     GPTIMPSET	Update	

10. To do this, click on a table in the top box (*Current Data Source*) and the same table in the bottom box (*Replace with*) and then click on *Update*. Do this for each table, even the ones listed under Subreports.

x Set Datasource Location Change the location of the data source by selecting the current database (or table) and choosing the database (or table) to replace it with. Then click Update. Current Data Source: 🖃 🖳 report 🚊 🤒 GBAWork 001 • Properties WKORDER 🗄 🛄 WKORDERLOC 🗄 🛄 WKRESRCE 🗄 🛄 WKTMPSBST 🗄 🛄 WKWOASSET WKWOEVENTS 🗄 🛄 WKWOTSK 🗄 🏙 GBAWork 001 Replace with: WKIMPSET Update WKINTCORRELAT WKINTEGRATIONS WKINTMAP I WKLEADFLDR WKMEMO WKMPASSET WKMTRFLDR WKNOTCOM WKNXTNUM WKOPTIONS WKORDEF WKORDERLOC WKPAYPERIOD

Note: Properties is not a table to be updated.

11. After the report is converted for Web use it will need to be added to the appropriate report folder.

### **Standard Report to a Custom Report**

To develop a Custom Report it is often helpful to use a standard Lucity report to start from as opposed to starting from scratch. If your agency uses the Web version of Lucity exclusively then using a standard report pointed correctly for Web use is likely preferred. Depending on the Lucity version being used, there may be options for getting a copy of a Web report.

- The report .rpt file can be copied directly in the report folder and given a new name.
- Lucity offers a Download feature where a copy of the report can be placed on your system.
- There is also a way to Export the report holding the connections to your data similar to the Desktop Export feature.

### Downloading

6.

Downloading a report grabs a copy of the report that can be used to create a custom report from. This report has the correct OLE connections for Web use but it cannot be run outside of the Lucity environment without manually repointing the tables to your data.

- 1. In the Report Dialog click on the report to be copied.
- 2. Once the report is highlighted, click on the **Download** button.

Add	Edit	Update	Download	Delete	

3. Under the **Save** options select **Save as** then browse to the location and give the file a new name.

Do you want to open or save WOSumWeb.rpt (26.5 KB) from bpinkston-It? Open Save 🔻 Cancel	×
--	---

### Exporting a Web Report

Exporting a report captures the connections to your data. This allows the report developer to work on the report and run it outside of the Lucity environment.

- 1. In the Report Dialog click on the report to be Exported.
- 2. Run the report with Selected Records and the Advanced View (HTML) options.
- 3. Once the report has run, select the Export this report option in the top tool bar.
- 4. This opens the following Dialog. Click Export.

Export	×
File Format: Crystal Reports (RPT)	]
Page Range: All Pages	
Select Pages     From: To:	
	Export

5. The referenced report name in this example is lucityMSCRV.rpt and is not the actual file name, ignore this. Under the **Save** options select **Save as** then browse to the location and give the file a new name.

Do you want to open or save lucityMSCRV.rpt from bpinkston-It?	Open Save <b>v</b> Cancel X
Select the <b>Open</b> option.	
The WOSumEx.rpt download has completed.	Open   Open folder  View downloads

7. In the tool bar select File, UNCHECK the Save Data with Report option.

- 8. Open the *Select Expert* and remove the formula for the ID field that was placed in here because the report was run with **Selected Records**.
- 9. Save. You now have a copy of the report with a new name and pointed to your data. The User ID and Password for your database are required to run the report away from the Lucity environment.

# **Adding Custom Web Reports (Prior to V2015)**

The converted report then needs to be added to a report folder, typically found at **intpub\wwwroot\LucityWeb\Reports**. Drop the report in the correct folder such as **Work** or **Equip**. Depending on your system and number of custom reports, you may have a separate **Custom Reports** folder and within this there may be folders for the type of reports such as **Work** or **Sewer**.

Then the report will need to be added to the list of available reports in the module the report is to be run from. There are two different methods for adding reports in the web.

#### Method 1 - Through the Lucity Administration Tool

TEP	1: Select Program 2: Select Module 3: Select Module Component	Work Orders (48) Work Orders (48)	ger	
95 F	Reports Report Name		Report Description	Report File Name
	1-main.rpt		nicoles test for santa clara	Reports\Work\1-main.rpt
	Aging Work Order Report		Lists work orders, age, and key data for work orders that have not bee	Reports\Work\WOsAgingWeb.rpt
	Aging Work Orders Graph		Dashboard report showing an aging work order report.	Reports\Work\DashWKOrderAgingW
	Aging WOs with Linked Wos		Aging WOs with open linked WOs.	Reports\Work\WOsAgingLinkWOWe
	Asset Summary Report		Summary Report of Work Order Assets	Reports\Work\WOAssetSumWeb.rpt
	BV Test Work Path		Test in work path	Reports\Work\BVQA_2.rpt
	BVTest		BV Test for custom path	Reports\Custom\BVQA.rpt
	Closed Work Orders with Open A	ssociated PMs	Closed Work Orders with associated open PMs summary report	Reports\Work\WOClosedWObutPMN
	Completed Work Order Summary		Lists Completed Work Orders Summarizing Costs and Labor Hours.	Reports\Work\WOCompWOSumWeb
	Contractor Usage Detail Report		Lists Start and End Dates, Cost and Quantity of Contractor along with .	. Reports\Work\WOContUseDetWeb.rpt
	Contractor Usage Summary Repo	ort	Summarizes Cost and Quantity information of Contractor used in Work	Reports\Work\WOContUseSumWeb.rpt
	Crew Assignment Report	<b>.</b>	Displays Work Order Number, Supervisor, Start Date, Main Task, and	Reports\Work\WOCrewAssWeb.rpt

1. Launch the Lucity Administration Tool and go to **Reports > Report Manager**.

- 2. Use the drop downs at the top of the tool to navigate to the module that the report is meant for.
- 3. Click the *New Report* button at the bottom of the Report Manager dialog.

4. The following window will appear:

Ă	New Report	_ <b>D</b> X	
Report Name			
Example			
Report File Path (partial path be	Report File Path (partial path beginning with Reports\)		
Reports\CustomWebReports\V	Vork\ExampleReportWeb.rpt		
Report Description			
This is an example of a report being added.			
Report Group (optional):	¥		
Save Cancel	]		

- 5. Enter the Report Name.
- 6. Enter the Report File Path. This should always start with Reports\ and then the rest of the path to the report including the .rpt file extension.
- 7. Enter the **Report Description**.
- 8. Click Save. The new report will be added to the Report Manager.

#### Method 2 - Through Lucity Web

- 1. Open the Web module that the report will be run from.
- 2. Open the Reports Tool.
- 3. To launch the Reports tool, click the 💼 on the toolbar. The following window will appear:

Report Group: All +	
Report Name	Report Description
Crew Assignment Report - All Addresses	Lists Work Orders grouped by Crew that shows all addresses.
Employee Hours by Equipment Summary Report	Lists employee usage (in hours) by equipment. This report will only evaluate e
Employee Usage Detail	Details all Work Order Information each employee has been associated with
Employee Usage Summary Report	Summarizes Total Cost, Units, and Average Rate per Employee.
Equipment Hours by Employee Summary Report	Lists equipment usage (in hours) by employee. This report will only evaluate e
Equipment Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Equipment along with Task and
Equipment Usage Summary Report	Summarizes Cost and Quantity information of Equipment used in Work Orders.
Fluid Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Fluid along with Task and Work
Fluid Usage Summary Report	Summarizes Cost and Quantity information of Fluid used in Work Orders.
Main Task Summary Grouped by Category	Main Task with WO cost grouped by Category.
Main Task Summary Report	Count and Total Cost of Work Orders by Main Task
Main Task Summary with Hours Grouped by Category	Main Task with WO cost and Employee and Equipment hours grouped by Catego
Material Usage Detail Report	Lists Start and End Dates, Cost and Quantity of Materials along with Task and V
Material Usage Summary Report	Summarizes Cost and Quantity information of Materials used in Work Orders.
Monthly Open Work Orders Chart by Status/Cat	Dashboard report showing all open work orders for the current month by cates
Monthly Open Work Orders Chart by Status/Cat/Prob	Dashboard report showing all open work orders for the current month by cates
Monthly Open Work Orders Chart by Status/Cat/Task	Dashboard report showing all open work orders for the current month by cates
Monthly Open Work Orders Chart by Status/Crew	Dashboard report showing all open work orders for the current month by crew

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

Add Report	
Report Name:	
Report Description:	
Report File Path (partial path beginning with Reports\):	
heport inter and (partial path seguring manneports).	
Report Group (optional):	[[None] •
<ul> <li>Standard Report</li> </ul>	Quick Report - All Records
Quick Report - Filtered Set	Quick Report - Current Record Only
Cancel	Save

5. Enter a *Report Name*, *Report Description*, and the *Report Filename* (starting with Reports)) then the folder name where the report is located followed by a backslash (Work) then the name of the actual .rpt file. Remember to add the .rpt portion on at the end of the report filename.

	-,,
Edit Report	
Report Name:	Main Task Summary Report
Report Description:	Count and Total Cost of Work Orders by Main Task
Report File Path (partial path beginning with Reports\):	Reports\Work\WOMainTskSumWeb.rpt
Report Group (optional):	[[None] •
<ul> <li>Standard Report</li> </ul>	Quick Report - All Records
Quick Report - Filtered Set	Quick Report - Current Record Only
Cancel	Update

- 6. Choose the type of report this will be:
  - Standard Report The report will be run by clicking the report tool, selecting the report and how to run it, and running it.
  - Quick Report All Records Adds the report to the quick report dropdown list next to the report tool. The report will always be run against all records.
  - Quick Report Filtered Set Adds the report to the quick report dropdown list next to the report tool. The report will always be run against the current filter set.
  - Quick Report Current Record Only Adds the report to the quick report dropdown list next to the report tool. The report will always be run against the current record.
- 7. Click Save.

# Adding Custom Web Reports (V2015 and Beyond... for now)

The Lucity software is moving the web design to be used as Software As A Service (SAAS). To accommodate this direction, the Custom Web reports are handled in a different way.

There are two locations that Lucity will now use to manage custom reports.

- One is a new folder that can be seen in **inetpub > wwwroot > LucityWeb** that is called **ReportsCustom**. The client should **NEVER** be in this folder.
- The other is a new location that the client sets up. (**Report Share**) Once this is set up and the existing reports moved into this new folder then this folder should not be directly used by the client unless copying a report to be modified. Indirectly, the new custom reports will be uploaded to this location.

### **Understanding the Process**

#### How Lucity Manages Custom Reports

**Lucity** makes it easy for an agency to manage its custom reports by managing the file locations for them and providing an easy user interface for uploading report files. To make this process work there are several components on the back end. The following table describes those components and the diagrams show how they work together to complete a process.

Components	
Lucity Web Reports Tool	A tool that enables Lucity Web users to add, update and run Lucity reports.
Document Server	A Lucity Web Server application that enables users to move files (including reports) around using Lucity Web.
Report Share	<ul> <li>The folder that stores a user-accessible copy of each custom report's .rpt file.</li> <li>The path is set in the Lucity Administration Tool &gt; System &gt; Settings &gt; Documents &gt; Path where reports are stored setting.</li> <li>Lucity Web does not run reports from this location.</li> <li>Users can copy reports out of this folder to modify them.</li> <li>The reports in this folder are copied to the /ReportsCustom folder daily.</li> </ul>
/Reports Folder	<ul> <li>The folder that stores a Lucity Web-accessible copy of each standard report's .rpt file.</li> <li>Lucity Web runs all of Lucity's built-in, standard reports from this location.</li> <li>Historically, custom reports were added to this folder and they were mixed in with standard Lucity reports.</li> </ul>

<ul><li>Users can copy reports out of this folder to make custom reports.</li><li>The reports in this folder should not be modified.</li></ul>
The folder that stores a Lucity Web-accessible copy of each custom report's .rpt file.
Lucity Web runs all custom reports from this location.
• The reports in this folder should not be modified.
• The reports in this folder are overwritten with copies from the <b>Report Share</b> folder.

#### **Processes**

These are the processes that occur in the background when users are working with *Lucity Web* and custom reports.

#### User adds a custom report



#### Note: Give this process a minute to complete before attempting to run the new report from Lucity.



#### User updates a custom report

#### User runs a custom report



Automatic custom report processes



### **Best Practice for Making the Change**

The custom web reports need to be moved to their new location and the path reestablished. If there are problems with mapping to the new location then remove and add them into the system as if they were new reports.

The Document Server must be setup for the report process to work as designed.

#### **Report Setup**

1. If the client doesn't currently have a location outside of Lucity to store and work on custom reports then this should be established first.

It might be a good idea to have one shared file for all custom reports for your company. This is separate from Lucity!

All existing custom reports currently in **wwwroot\LucityWeb\Reports** should be placed in this new folder or subfolders in this location.

Example folder name: CompanyCustomWebReports.

2. A second location needs to be established which Lucity will use. This needs to be a folder that the WebServer (IIS) can get to. Ideally, this would not be on the web server. That means it will be on a network share. Something like <u>\\<Servername>\Shared\CustomWebReports</u>.

Example: \\ClientServ-01\WaterGroup\CustomWebRpts15

Where "<u>\ClientServ-01</u>" references the server, "WaterGroup" the Shared location and "CustomWebRpts15" the folder name for the custom web reports.

3. This path then needs to be entered in:

Lucity Administration Tools > System > Settings... > Documents tab > Path where Reports are stored. Enter the new path for the Custom Web reports.

(Example: <u>\\ClientServ-01\WaterGroup\CustomWebRpts15</u>) Save

4. Clear Caches

Lucity Administration Tools > System > Clear All Site Caches... > Clear All Caches button.

5. An agency may wish to create a directory structure in this location to separate reports by system; however, this is optional:

\\\Servername>\Shared\CustomWebReports\Work\ <reports for the work program go here>

\\shared\CustomWebReports\Sewer\ <reports for the sewer program go here>

6. Once the custom report path has been established and the custom reports are in the new location then try using the **Update** feature and browse out to the new location. If there are any problems with reestablishing the report's path then remove the report and add as new.

#### How To Add New Custom Reports



Going forward, when adding new custom reports, upload the report using *Lucity Web*. The system will place the report in the report-share automatically.

- 1. In *Lucity Web*, open the module you would like to add the report to.
- 2. Click the Reports 🕑 button on the toolbar. The *Report* tool opens.
- 3. To add a new report, click the Add button. The following dialog appears:

V2015

Add Report	
Report Name:	
Report Description:	
Report File Path:	
Choose File to Upload:	
Report Group (optional):	[None] •
<ul> <li>Standard Report</li> </ul>	Quick Report - All Records
🔘 Quick Report - Filtered Set	Quick Report - Current Record Only
Cancel	Save

#### V2015r2

#### V2016

A	dd Report	
Rej	Report Name:	
	Report Description:	
	Subdirectory that Report will be stored in: (%CustomReportFolder%\)	
Q		
	Choose File to Upload:	
P		Browse
d Q	Optional Report Group: [none] V	
	Cancel	Save

- 4. Enter the *Report Name* and *Report Description*.
- 5. In the *Report File Path*, enter the name of the subfolder to which you want to upload the report file (ex. Work, Sewer) or leave blank.

**Note:** Reports are automatically uploaded to the location specified in the Lucity Administration Tool's "Path where Reports are stored" setting, which may be found in the **System > Settings > Documents tab**.

**Note:** If the folder name entered does not exist, the system will create a folder with that name within the folder to which the reports are uploaded.

6. Under *Choose File to Upload*, click the Browse button is and select the .rpt file you would like to upload to the web server. The report would ideally be located in the folder established in Step 1 at the top of this document (**CompanyCustomWebReports**) or a subfolder within; however, it can be brought in from any location. This will put the report into the location created for Custom Web reports that was designated in the *System Settings Report File Path*.

*Note:* The name of the .rpt file being uploaded cannot match any other .rpt files.

- 7. Assign the report to a *Group* (optional).
- 8. Choose or change the *Type* of report (V2015):
  - Standard Report The report is generated when the user clicks the Report tool, selects the report and chooses how to run it.
  - Quick Report All Records Adds the report to the Quick Report drop-down list, located next to the Report tool. The report always runs against all records.
  - Quick Report Filtered Set Adds the report to the *Quick Report* drop-down list, located next to the Report tool. The report always runs against the current filter set.

• Quick Report - Current Record Only - Adds the report to the *Quick Report* drop-down list, located next to the Report tool. The report always runs against the current record.

Add Report	
Report Name:	WO Resource Custom Report
Report Description:	Modified WO Resource report
Report File Path:	Work
Choose File to Upload:	WOResourceCustomWeb.rpt
Report Group (optional):	[None]
<ul> <li>Standard Report</li> </ul>	Quick Report - All Records
🔘 Quick Report - Filtered Set	: 🔘 Quick Report - Current Record Only
Cancel	Save

For V2015r2 these options are available in the Edit mode.

For V2016 the Quick Report option may be added through the Quick Report drop down arrow



Or through the Report tool where the reports are listed. Click on the report to be setup as Quick then select Add Quick Report Add Quick Report. The Create Quick Report dialog will open where the various reporting options can be setup.

С	Create Quick Report For : Main Task Detail Report			
enar enar o Sta	All Records	Filtered Records	Selected Records	
A	s:			
on İsh	Basic View	Advanced View		
sh	Cancel		Save	

9. Click Save.

#### **Editing Reports**



Editing allows changes in the Report Name, Description or Grouping.

#### **Updating Custom Reports**



When existing Custom reports need to be revised, this should be done outside of the Lucity system. The revised reports could be worked on or loaded into the location established for your company, mentioned in step 1 (Example: **CompanyCustomWebReports**).

- 1. Open *Lucity Web* and go to the module associated with the report.
- 2. Click the Reports button on the toolbar. The *Report* tool opens.
- 3. Select the report to update from the list and click the Update Report File button.

Update Report File (StaticWOSumWeb.rpt.rpt)	
This will replace the existing .rpt on the server. Please ensure that the file selected has the same name as the	
Cancel	Update

Note: The file name has to be identical to the file being replaced.

- 4. Click the Browse button and select your updated .rpt file from the location of the revised report (Example: CompanyCustomWebReports).
- 5. Click **Update** or **Save** depending on the version.
- 6. The new copy of the report will be uploaded and will replace the existing report file in the Lucity system (the location established in the System Settings Report Path).
- 7. Wait a minute before trying to run the updated version of the report. This allows the system to cycle and use the revised report.

**Note:** The reports that Lucity provides with the software (standard reports) cannot be updated.



For version **2015 sp0**, if the User's Report Security isn't set up properly, a user can delete the entire report file. This caused problems with several clients so this was changed.

In 2015 sp1 the Delete option queries if the user would like to delete the report.

Confirmation		23
Are you sure you want to delete this Report?		
Yes	No	

If you select **Yes**, the report is removed from the dialog but the report remains out in the Custom Report folder as an orphan. The IT administrator can retrieve it if necessary or delete it.

V2016 has two options in the Delete process.

First you can delete the path to the report.



The second allows the removal of the actual report.



# **Page Limit**

### V2015 and Older

When reports are run in the Web with the PDF view the page limitation is ten.

In order to increase the web page limit you will need to add a new line statement to the appsettings.config file. This is located on your Web Server in the C:\inetpub\wwwroot\LucityWeb\Config\appsettings.config folder:

 Open the file with Notepad and paste the following line between the <appSettings> and </appSettings>:

```
<add key="MAXPDFPAGES" value="10" />
```

 $\circ$  Adjust the "10" to the total number of pages you want the report(s) to account for.

Note: the larger the number the longer it will take to generate.

The file when complete should look similar to this:

```
<appSettings>
```

```
<add key="MAXPDFPAGES" value="50" />
```

```
</appSettings>
```

This may require an IIS reset to take the changes.

### V2015r2

PDF (Basic View) page number can be modified in Lucity Administration > System > Settings > Web Performance tab > Max # of Pages on PDF Crystal Reports (to reduce performance impact on server).

V2016 uses the new report term Basic View.

ystem	Navig	gation Fo	rms Rep	orts GIS	Security	Windows	s Help					
System	n Settir	ngs										
Арреа	ance	Designer A	Automation	Documents	Email	General	GIS 3rd P	arty Integrations	GIS Desktop	GIS Edit Integration	n GIS Routi	ing GIS Wel
Mobile	•	REST API	SaaS	Security	Settings	with custom	interface	TimeSheet	Web Performan	Web Site	Work	Work Zones
	Desc	ription						Value				
	Allow	Animations to	run inside of	the website.				TRUE				
	Enable	e Column Res	ize for grid p	ages with less t	han this nu	mber of rows	3	50				
	Exclud	de Desktop R	ecords in Ad	d Mode (When	TRUE, que	eries will be :	slower)	FALSE				
	Favor	configuration	over perform	ance for husine	ess nules			FALSE				
	Max # of Pages on PDF Crystal Reports (to reduce performance impact on server)				20	•						
	Persist changes to page size in List New					TRUE						
	<b>T</b>	The number of minutes until a dashboard report should be refreshed.				240						

# Web Report Grouping

#### V2014R2

- 1. In Lucity Administration Tools go into Reports > Report Manager
  - a. Select Program
  - b. Select Module
  - c. Select Module Component
- 2. Click on Report Groups

The Report Group Manager window will show.

Å	Report Group Manager
Grou	ps for WorkWorkOrder
Babs	Gr
	Add Edit Delete

- > Select *Add* to add a group.
  - Type in a Group Name
  - o Save
- > Select *Edit* to edit an existing group.
  - Type in a revised Group Name
  - o Save
- > Select *Delet*e to delete an existing group.
- 3. Close the Report Group Manager window.
- 4. In the Report Manager select a report to include in a group.
- 5. Click Edit...
- 6. In the Update Report window there is an option for *Report Group (optional)* with a drop down arrow. Select the group the report is to be associated with.
- 7. Save

The Group Name should now show in the Report Group column for the selected report.

- 8. Repeat from step 4 for all reports to be associated with the group.
- 9. When the Web module's report list is opened, the top left corner now has a drop down box for Report Group. When the group is selected, only the reports assigned to the group will show.

If the newly added group does not show in the list then close Lucity and go into Lucity Administration Tools > System > Manage Web Site Caches...

- Scroll to the bottom and click **Clear all Caches**.
- o Close
- Reopen the Web module's report list and the Report group should now be present in the Report Group drop down box.

#### V2016

Groups are established from the Report tool listing the reports for the module.

R	eports For Work Orders		
Mi	All Records V		Manage Report Groups
Mi	Report Name 1	Report Description	۹

Selecting Manage Report Groups opens the following dialog:

R	ep	ort Groups		
301	^	Group Name $l_z^{n}$		Q
s b		babs		
tes rde rde rde rde		Baker		
Nico ry F				~
`	_		Add Edit Dele	te
		Close		

Groups may be Added, Edited or Deleted from here.

### **Parameters**

Parameters are special Crystal fields that query the user for information to be used in the report before the report will run.

Example

Enter Values		×
Enter FiscalYear:		FiscalYear
Enter Month(s):		Months
Available Values: January February March April May June July August	Selected Values:	
	Ren	Nove Remove All OK Cancel

Prior to V2015r2, reports used as **Dashboard** reports should avoid the use of parameters. Otherwise the report will show as a link to run the report as opposed to seeing the report.

**Web** reports allow the use of parameters but may have some limitations depending on the version of Lucity and Crystal being used.

Common parameters used in Lucity reports include subtitles and date queries.

• These can be removed by clicking on the Parameter field and selecting *Delete*.

The report no longer uses the parameter field, but the parameter exists in *Field Explorer*. Unused parameter fields have been an issue in some Web reports. It can be confusing. The unused parameter still queries but then the parameters are not used in the report.

To permanently remove the parameter field in *Field Explorer*:

• Right click on the specific parameter field and select *Delete* 

OR

• Click the parameter field and press the delete key.

Parameter fields are recognizable by the "?" at the beginning of the field:

Report Subtitle

### **Date Selection**

To use parameters in selecting a range of dates in Record selection use the following format.

```
{@RecDt} in[{?Start Date} to {?End Date}]
```

Instead of

{?Start Date}<={@RecDt} and {@RecDt}<={?End Date}</pre>

### **Multiple Selection**

Prior to V2015 a parameter that was set up to allow multiple values only accepted a single value when the report was run in the Web. If the report was developed in Crystal XI or earlier, the report did not allow multiple values to be selected. If the report was created in Crystal 2008 or later it was possible to query again once the report had been run in the HTML view (Advanced view) to allow multiple values. This is set-up within the Parameter field. The *Value Option* is "Show on (Viewer) Panel". The setting options are Editable, Do not show and Read Only.

Option	Setting
Show on (Viewer) Panel	Editable
Prompt Text	Enter Equipment:
Prompt With Description Only	False
Optional Prompt	False
Default Value	
Allow custom values	True
Allow multiple values	True
Allow discrete values	True

When this setting is **Editable** and the Web report opened with the HTML view (Advanced view), the **Parameter** button will be active for use to modify the Parameter selection. To use this option, complete the following steps:



1. Click on **Parameters** to open a panel to the left of the report.



2. The actual parameter screen can be opened to either select a new value or multiple values (if the parameter was set up to allow multiples) by clicking on the Parameter value and then clicking the "*Edit parameter value*" button.

Enter Values		×
Enter Equipment: Available Values: DP0952 DP1065 DP1066 DP1067	ected Values: 20952	
Enter a Value:  DP0952		Remove Remove All
		OK Cancel

- 3. After the new selection values have been set up, click on OK.
- 4. At the top of the Parameter column select "Apply".

Note: If parameters are set up in a subreport, they should not have the same name as parameters in the main report.

### **Dynamic Parameters**

Starting in V2015, the Dynamic Parameter pick list was available when running the report in Lucity Web. The way to achieve this is by naming the parameter the same as the field name.

- 1. For example, if the Work Category field was to be set up as a dynamic pick list, the Name would be entered as WKORDER.WO\_CAT\_TY. The Prompt Text usually defaults to the Name field (Enter WKORDER.WO\_CAT\_TY) so this would likely be modified to "Enter Category".
- 2. List of Values should be set to Dynamic.
- 3. The actual field should be selected for the *Value*. This allows all data within this field to show in the pick list.
- 4. Within the Value Options set the "Show on (Viewer) Panel" to Editable.
- 5. It is also necessary to set the option for "Allow multiple values" to True.

Name:		Туре:		Lie	st of Values:
WKORDER.WO_CAT_TY		String			)ynamic
Prompt Group Text:					
Choose a Data Source:					
🔘 New	(	Existing	📴 WO_CAT_TY -	Prompt Gr	roup
🗎 🗙   + -+					
Value	Description			Parame	ters
wo_cat_ty	(None)			[ <b>?</b> ] WK	ORDER.WO_CAT_TY
٠					
Value Options - Level 1 (WO_CAT_TY):					
Option		Set	ting		
Show on (Viewer) Panel		Edit	able		
Prompt Text			er Category:		
Sort Order			ending by Value		
Prompt With Description Only		Fals			
Optional Prompt		Fals			
Allow multiple values		Tru	e		

# **Barcode Reports**

### Crystal XI (Desktop or Web)

Reports developed with Crystal XI or before could show barcodes but it required the font 39 software to be present on the machine the report was run from. The field in the report also needed to be placed in a formula for the font software to create the barcode.

Example: "\*"+uppercase({PTLOCATION.PL\_NUMBER})+"\*"

Because Lucity Desktop uses Crystal XI to generate reports, this is the only option for developing and running barcode reports in desktop.

# Crystal 2008 (Web only)

Reports developed with Crystal 2008 or newer have a barcode option to apply to individual fields. Lucity Web uses Crystal 2008 to run Crystal reports so this feature may be used.

For the field to show as a barcode, bring the field into the report and right click. The following options show:

		Field: PTPARTS.PA_NUMBER	
-		Find in Field Explorer	
i		Find in Formulas	
	8	Forma <u>t</u> Field	
	4	Format <u>P</u> ainter	
4		Change To Barcode	>
	₽	Highlighting Expert	
	ø	Browse Field Data	
		Select Expert Record	
		Select Expert Group	
		Select Expert Saved Data	
		Insert	
		Size and Position	
	×	Cut	
	D	Сору	
	1	Paste	
		Delete	

Select Change To Barcode...

Then select the desired Barcode Type.

Select Barcode Type	
Select the desired barcode type:	
Code 39	Selected Barcode Type:
Code 39 Full ASCII	Name:
	Vendor:
	Font Name:
	Sample Input:
	Sample Barcode:
	For More Information:
	View Vendor's Web Site
	OK Cancel Help

Select Barcode Type		<b>X</b>
Select the desired barcode type:		
Code 39	-Selected Barcode Typ	)e:
Code 39 Full ASCII	Name:	Code 39
	Vendor:	Azalea Software, Inc.
	Font Name:	Code39AzaleaWide2
	Sample Input:	ABC1234
	Sample Barcode:	
	For More Informatio	n:
	View Vendor	's Web Site
		K Cancel Help

#### Report Design view

	· - - -	Parts Bar Coding PReport Subtitle	•	Print Date
	- - -	Part ID Percription ] Part ID Description Bar Code of ID Bar Code of ID	, ,	
GH1		//oroup#1/tVatne////////////////////////////////////		
D	-	PA_NUMBER 'jpa_desc 'i PA_NUMBER 'jPA_DESC		۹. ۹. ۹. ۹
GF1a	·	PA_NUMBER ]PA_DESC ]		
GF1b	· ·			
PF	·			

### **Report View**

Prior to V2015r2 the Web report viewing options were **PDF** and **HTML**. Both report views query for any parameters in the report.

The PDF view shows the report with a scrolling format - 10 page limit (unless modified).

The **HTML** view shows the report as paged with a Parameter tab at the top. If the report is set up with editable parameters, this tab would open the parameters to be modified and applied for the report to run again with the new parameters. The **HTML** view is also available to export.

For V2015r2 sp0 the web viewing options remain the same. The Dashboard reports have changed the viewing options to **Report** (old **PDF** - with 20 page limit unless modified in Settings) and **Paged Report** (old **HTML**).

For V2015r2 sp1 the viewing options changed for both Web and Dashboard. **Basic View** (old **PDF**) and **Advanced View** (old **HTML**).

# **Dashboard Reports**

### V2015 and Older

Dashboard reports prior to V2015r2 were set up in Lucity Administration Tools.

To add a standard Dashboard report to your Dashboard, do the following:

- 1. In *Lucity Admin Tools* click on **Dashboard > Dashboard/Preferences.**
- 2. If Lucity is in the list of users on the left, select it and click Edit. If it is not there, click Add.
  - $\circ$   $\;$  If you have to Add, then on the next screen select Lucity.
- 3. On the Dashboard tabs screen click Add.
- 4. Give the tab a name then click **Add** to add a frame.
- 5. Give the frame a name then click **Add** to add a plugin.
- 6. Select Crystal Report from the list, give it a name if desired and click OK.
- 7. Once a *Plugin Type* of **Crystal Report** is selected then an **Add Report** dialog is opened.
  - The Show Only Dashboard Reports option will show a list of reports created with no parameters and to fit a frame size.
  - If this option is unchecked then all reports are available to add to Dashboard. If the report has a parameter it will show as a link to open the report.

🔏 Add Report 🗙				
Show Only Dashboard Reports Dashboard reports are defined by having a filename that starts with 'dash' and require no parameters to run. Non-dashboard reports can be used but will show up as a link to the report and require the user to supply needed parameters.				
Work Order Manager 🗸 🗸				
Work Orders 🗸				
Work Orders 🗸				
Report Name				
Report Filename				
Reports\Work\ACT15_WOCatLoc2Web.rpt				
Filter				
WKORDER				
Acquire     Set Dimensions       Display link to report     Width       HTML     PDF				

- 8. Select the module you want the report to run in by using the three drop downs.
- 9. Select the report to run under *Report Name*.
- 10. To change the filter, click the *Acquire* button. Click **OK**.
- 11. Click OK, click OK, click OK, click Save. Click Close.
- 12. The report should now show in the web dashboard.

Ă	Luc 🍝 🛛 Edit P	references For: Lucity Inc. (L	ucity) 🗶	TY
System Dashboard Navigation For	rms R Dashboard Tabs	•		
	Work Orders		Add	
🖌 Dashboard/Pret 🔏		Edit Dashboard Tab	<b>F</b> 10	x
Users O Templates	ame Work Orders			
GBA Lucity Inc. (Lucity)	Enable Refresh Rate: 30	(seconds)		
	Frames			_
	Frame Fo	🚣 Edit Frame	X	Add
	Name	Frame Name	Span Frame	Edit
	Work Orders Tr.	Work Orders		elete
		Show 'Launch In Desktop'		
		<ul> <li>Show 'Launch In Web'</li> <li>For Web</li> </ul>		
		For Web     For Mobile		
		Mobile Offline Support		<b>_</b>
		Add Dhusin	x	
		🖌 🛛 Add Plugin		ancel
		Select Plugin Type: Crystal Report	~	
		Plugin Name		
		WOs by Category		
	Apply Template	ОК	Cancel	
Ad	CT15_WO		Сору	- a
			Existing	
				a <sup>100</sup>
				-
ReqCount	ACT15_WO	ОК	Cancel	

### V2015r2

As of V2015r2 the Dashboard design has been removed from Lucity Administration and the Dashboard is now set up in the Web screen.



When Crystal Report is selected then the following dialog opens.

← 🗒 🔕 🔔 😧 Lucity Ind.
Add Report
■ Show Only Dashboard Reports
Selected Module:
Work Orders (48) Select Module
Report Name:
ACT2015 WOs by Category
Filter:
WKORDER
Acquire
Report First 20 Pages
Linked Report A link that opens the first 20 pages in another tab.
O Paged Report Display one page at a time, but not limited to the first 20 pages.
Set Dimensions
Cancel Save

Note: V2015r2 sp0 viewing options do not work correctly. Report (old PDF) shows as blank, Linked shows as old PDF and Paged Report (old HTML) shows as old PDF. There is a patch. It was corrected in V2015r2 sp1.

For a report with parameters set up in Dashboard as Advanced (old HTML), the parameters will be

offered before the report runs. Refresh will reoffer the parameters. **Open Work Orders** + Work Orders (1376) Please Enter a Subtitle (not required) Enter Category: Auxiliary Equipment Backflow Preventors Blue River BLDG Bridge Maintenance Bus Stops Cabinet Call Center Conductor Cabling Conduit Cabling Curb Detention Basins Equipment Facilities Enter Test Unused Parameter: OK Your Filter has been converted for Crystal Reports. < >

# **Field Growing**

Depending on the field size and Field formatting, there may be issues with the field growing horizontally when run in the Advanced View (HTML). If a field has not been set up to grow vertically and if the value in the field is longer than the space provided by the field in the report, the field will grow horizontally into the next field.

Category Main Task Sewer Service/Waste Water Quality Commercial Description 1 821 S ROANOKE ST 820 S ROANOKE ST Residential Collections

To correct this, the field may be set up with the *Can Grow* option in *Format Field*. This will allow the field to grow vertically.

Category	Main Task
Sewer Service	Waste Water Quality Commercial
	Description 1
	821 S ROANOKE ST 820 S ROANOKE ST
Residential Collection	R esidential Collections

Some reports do not have the luxury of allowing a field to grow vertically, like a Detail report, where many fields are grouped together in the same report section. If there is no room to expand the field horizontally and a clipped field is acceptable, then in the *Can Grow* option the field can be limited to grow one line. This will lock the field size in.

Format Editor				
Common Border Font	Paragraph Hyperlink			
Object Name:	Field5			
Tool Tip Text:		<b>X-2</b>		
Read-only	Lock Position and Size			
Suppress		<u>×-2</u>		
Suppress If Duplicated		<u>×2</u>		
Can Grow	Maximum number of lines: (Enter 0 for no limit) 1	<u>*2</u>		

# Font

For Web reports avoid the use of the Calibri font. There are issues with viewing the report as PDF.

# Web Date Filters

If a date filter is built in the desktop, the filter uses the "#" sign.

WKORDER.WO\_STRT\_DT BETWEEN <u>#01</u>/01/2014# AND <u>#12</u>/31/2014#

If this is used in the web and the report is run with 'From Filtered Set', it will error.

Instead use the single quotes in the filter.

WKORDER.WO\_STRT\_DT BETWEEN '01/01/2012' AND '12/31/2012'

### Wildcard Use

For Lucity desktop filtering the wildcard symbol is the asterisk "\*". If a filter is built in the Lucity web version the wildcard symbol is the percent sign "%". Crystal recognizes the asterisk. The web version converts the symbol before it runs the report. If you typically use the percent sign for a wildcard make sure that when you are working in Crystal that you use the asterisk.

# Logged in User ID and Logged in Employee Code

For versions 7.4 or later the **Logged in User ID** and **Logged in Employee Code** can be brought into Web reports straight from Lucity. This information is being brought in from the Employee module in Work and is set up much like the "ViewSecuredFields" parameter.

- > For the User ID, create a new parameter called LOGGEDINUSERID.
- > For the Employee Code, create a new parameter called LOGGEDINEMPCODE.

Both parameters are String type fields.

Drag the parameter fields into the report. When the report is run from Lucity, these fields will populate with the correct Logged in User information.

# V2016r2

Many Lucity Administration Tools are now found in the Web Admin Portal.

👍 🙆 Lucity 15.5 - LucityThirdP 🕂 Lucity 16.0 - I	Master SQL S 🝺 Suggested Sites 🔻 🙁 Google 🗿 REST Tests 🔳 Select Project - Eventum 🌸 leankit Kanban 🅅 N	/ly Account MSDN Sub 📴 CNN.com - Breaking	New 💽 Knology.net Wel
	Admin Portal 🛞 🕂		2 🔇 🔔 🕜
Home + Reports	Reporting	Setting Value	Setting Category
Report Tasks + Users And Licenses	Close reports immediately to avoid max processing limit errors (may slow report generat	TRUE	Reporting
- Settings System Settings	Create Bookmarks From Group Tree Get Custom Crystal Reports on Web App Startup	TRUE	Reporting Reporting
+ Web App Management	Path where Reports are stored (Reports Hive)	\\lct-fs-01\q\group\rkraft\web\17Reports\	Reporting
+ Tools	Suppress Subtitles On Dashboard Reports Suppress Subtitles On View Reports	TRUE FALSE	Reporting Reporting

# Subtitle Suppression

Two new settings available are:

- **Suppress Subtitles On Dashboard Reports**, that removes the subtitle parameter for **Dashboard** reports.
- **Suppress Subtitles On View Reports**, that removes the subtitle parameter for reports run from modules.

For the Subtitile suppression to work correctly, the Subtitle parameter name must be "**Report Subtitle**".

### Group Tree Bookmark

Another new setting:

• Create Bookmarks From Group Tree, that allows users to create bookmarks within the output of a basic report.

### Web Performance

Reports take memory when they run. Each subreport is seen as an individual report when the reports run. If many individuals have numerous reports running on their dashboard, the system may slow down.

One possible solution to this issue is using Crystal Reports Server or SAP Business Intelligence Server (Crystal Reports Enterprise). This would allow reports to be offloaded to a server dedicated to that purpose. This is now supported in V2016r2. This is available to purchase through SAP.