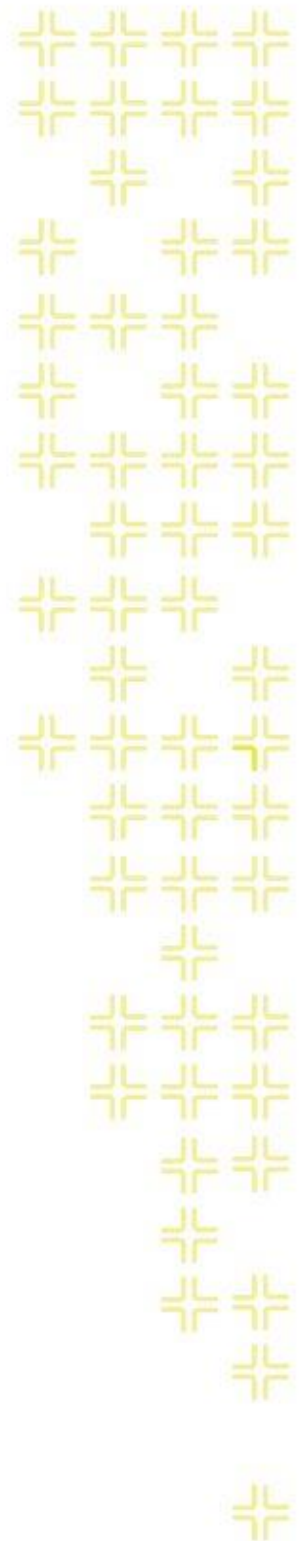




TRAINING GUIDE

Moving to Lucity Web



This manual is broken into 4 main parts.

- **Moving to Lucity Web** - Page 1 - Covers setting up Dashboards and Templates
- **Web Applications - End User Training** - Page 57 - Covers how to use various parts of the web application.
- **Web Applications - View, Grid, & Form Setup** - Page 82 - Covers how to configure Views, Grids, and Forms.
- **Examples** - Page 124 - Practice Scenarios to be used in class.

Moving to Lucy Web

This booklet is designed to help users effectively move from the Lucy Desktop to the Lucy Web. It will cover how the dashboard works, how the web grids and forms work, setting up security and some of the processes that you should think about when moving groups of users over to the web.

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Where to Start

Lucity Web has been designed to give users a tremendous amount of flexibility as to what data is shown to each user. To make things easier, each user can be assigned to one or more groups - in a similar way as to how the security system has been set up. Therefore, within each department, determine the different types of users. This can be a combination of roles/responsibilities and knowledge level.

Examples of Roles

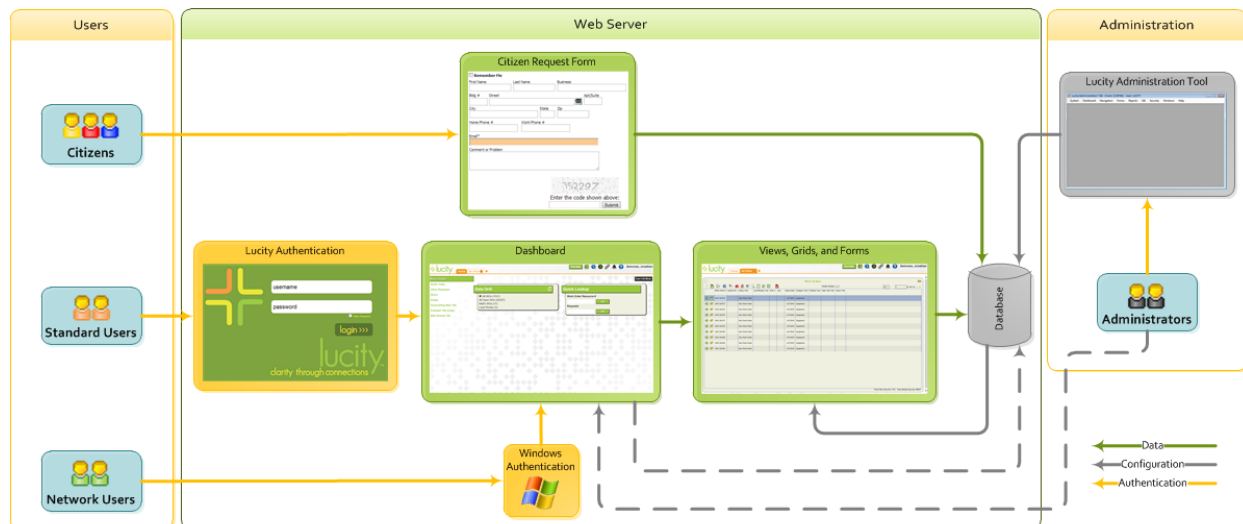
- Executive Directors
- Managers
- Office Workers
- Field Workers
- Co-ops/Temporary Employees

Examples of Knowledge Level

- Power users
- Editors
- Viewers
- Experts
- Novices

You are not going to convert everyone at once. Most users begin the process by either creating dashboards for groups or starting a group unfamiliar with the desktop and moving them directly onto Lucity web. However you start, set priorities and make a plan. We recommend that you do one group at a time and then move onto the next group.

The graphic below provides an overview of how the **Web** system works.



Dashboards

The Dashboard is an extremely powerful application in that it allows users to see critical information at a glance. It is easy for current desktop users to understand because it displays the results of predefined filters (which they understand) and can even launch the desktop to put them in a form for which they are familiar.

The main intent of the Dashboard is to put all sorts of information quickly in front of each user. This information can be customized so that each user only sees the data that is most important to him or her. We recommend meeting with the manager of each group and group leaders to determine what information that they feel is most important to view.

The Dashboard contains customized dashboard Tabs, data drills, reports, asset hierarchy trees, and RSS feeds that have been set up to show each user's items of interest. Within these dashboards users are able to set up quick links to programs in the *Lucity*™ suite in both the Web and Desktop applications. This allows the web application to act as a portal to critical *Lucity* modules. Users will have immediate access via the web to the modules that they use on a frequent basis. It contains the customized menus and forms used to add, edit, and view records in the desktop. We recommend that each user set up a shortcut to the correct website to launch the Dashboard quickly and easily.

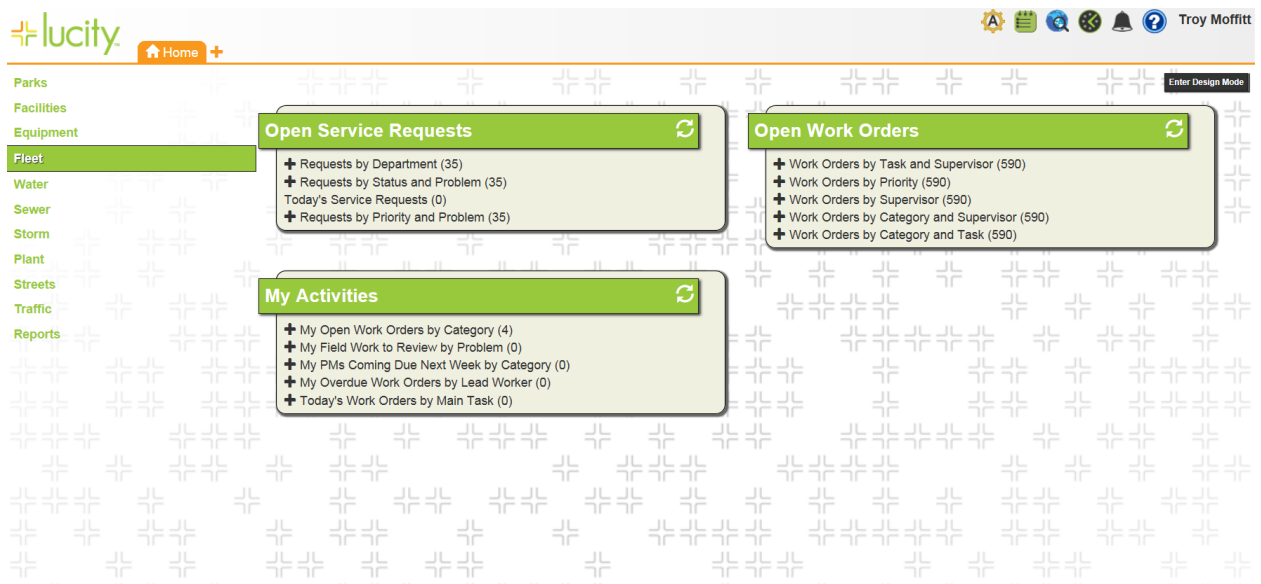
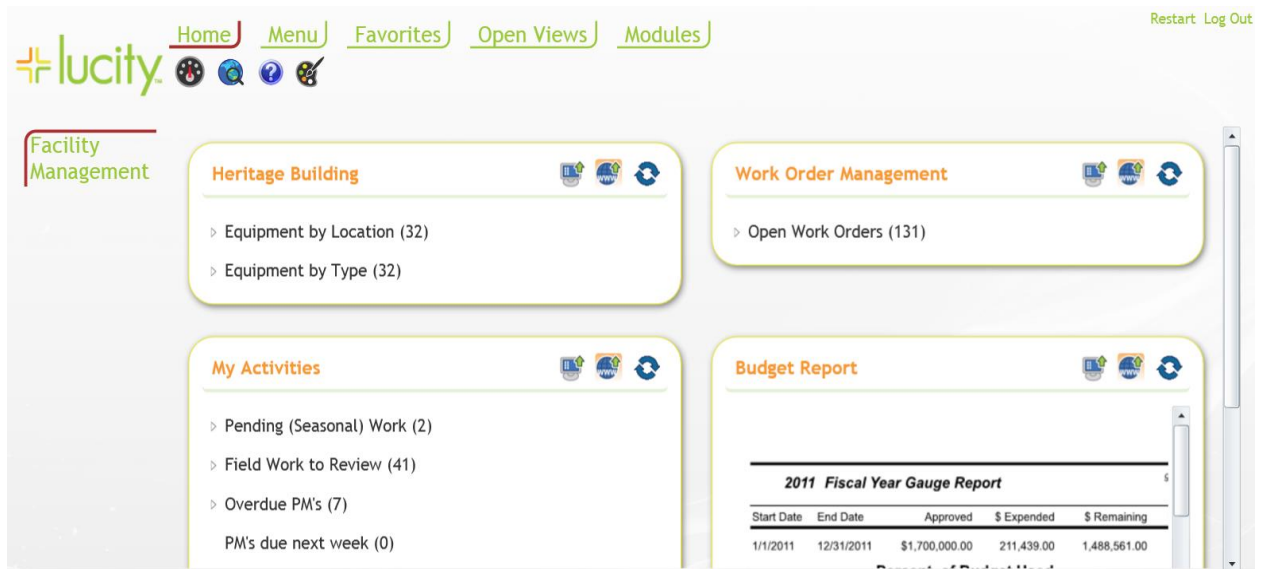
In the Lucity Administration tool the Dashboard/Preferences tool is an easy-to-use way to customize the look and content of your fully dynamic Dashboard page (in 15r2/16/16r2, this is done directly through the web). The Dashboard/Preferences allows you to create Dashboard settings for individual users as well as create Shared Tabs and Tab Groups that can be applied to multiple users.

Some examples of Dashboards:

The screenshot displays the Lucity Fleet dashboard interface. At the top, there is a navigation bar with tabs: Home, Menu, Favorites, Open Views, and Modules. The Lucity logo is on the left, and 'Restart Log Out' is on the right. The main content area is titled 'Fleet' and contains four primary modules, each with a refresh icon:

- Open Fleet Maintenance Work**:
 - Open Work by Supervisor (925)
 - Open Work by Vehicle (914)
 - Overdue PMs (529)
- Fleet Inventory**:
 - Vehicle Inventory by Type (689)
 - Vehicle Inventory by Department (689)
 - Critical Vehicle List (0)
- My Work Activities**:
 - Today's Scheduled Work (6)
 - Overdue Work (8)
 - Pm's Due Next Week (0)
- Fleet Budget Report**:
 - 2011 Fiscal Year Gauge Report
 - Buttons: Start Date, End Date, Expanded, & Expanded, & Download

A vertical scrollbar is visible on the right side of the dashboard.



As can be seen with the examples above, the information and the appearance of the dashboards are very customizable.

Some things that users do not often think to show in the dashboard are quality assurance/control information. This might be filters that show work orders that are incorrectly closed, do not have units filled in, anything where you want a count of 0 and the users can fix the information as soon as possible.

Before you actually start building the dashboard you want to have as many of the filters setup in the desktop (or the web) as you can. Make sure that you label each filter with text that will be understandable later as you will be selecting each filter in making the dashboard.

For 15r2/16/16r2, Lucity has made many changes to how the Dashboard looks and how it is created. For this class, we will start showing Version 14r2/15 and then show the changes that we made with Version 15r2/16/16r2.

Dashboard Layout - Version 14r2/15

Before we begin the process of how to set up the system, let's start with some basic terminology.



The menu at the top is the top menu bar.

Home - always displays the special dashboard buttons underneath it.

Menu - this displays a customized menu created for the user by the administrator

Favorites - this displays a list of Tabs that the user has marked as favorites

Open Views - this provides a list of all views that are open

Modules - this provides a list of all views that the user has permissions to use.

The special dashboard buttons do the following:



Open Dashboard – This button will always put all open views in the background and bring the dashboard forward.



Links – This shows web links that the user can launch. When setting up these links always use the entire web address (<http://www.lucity.com>). This button is not visible unless the user has links assigned to his or her dashboard.



Launch GIS Map. This button launches the GIS map that is setup for the user.



Help – This button launches the on-line help file.



Local Preferences – this button allows the user to make font and color changes to their personal dashboard. The user has to have the Change Default Application Colors permission set to true in order to change colors but can always change font sizes.



Timesheet – This button displays the timesheet (or timesheets) that the administrator has authorized for this user. If the user has rights, then the user may also see some timesheet administrator functions.

Dashboard Tabs



Each of the items to the left are called Dashboard tabs. By clicking on each tab, a different dashboard page appears (think of it as flipping a page). Each time a new Tab is accessed, the system needs to refresh the data set. This can take some time depending on how much data is being accessed.

We recommend that no one dashboard is so full of information that it takes a long time to pull up. Only data from the current dashboard Tab is analyzed at one time and it always starts with the Dashboard Tab at the top. Keep it clean and the reports that it pulls up simple.

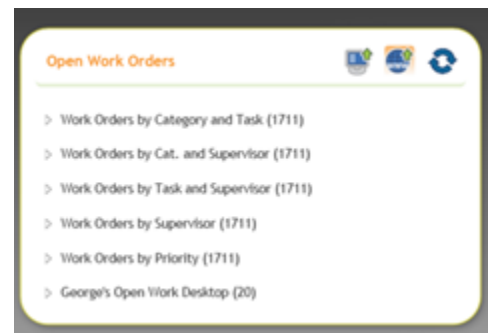
A user can have an unlimited number of Dashboard Tabs per dashboard.

Administrators can also setup Shared Tabs. Information on these tabs is modified once and then is updated on all dashboards that use the shared tab.

Dashboard Frames

The box to the left shows an example of a Dashboard Frame. These frames show information that has been gleaned from the Lucy data. To the left shows data drill information (the user can drill down into the data to see how it is structured). Frames can also show Reports, Asset Hierarchy Trees, and RSS feeds. The Web map is also shown as a Plugin type and it was first available with the 16 release.

Each dashboard can have an unlimited number of dashboard frames and an unlimited number of plugins but we again recommend keeping each dashboard Tab as clean and fast as possible.



Dashboard Frames contain the following elements:

A Dashboard Frame Title (Open Work Orders above)



Launch in Desktop button - If this button has the orange square surrounding it, then when the data drill text is selected, the Lucy desktop application will be launched and the number of records in the data drill will be retrieved. This button can be removed from any dashboard frame during the dashboard setup.



Launch in Web button - If this button has the orange square surrounding it then when the data drill text is selected, the Lucy web application will be launched for this data type and the number of records in the data drill will be retrieved. This button can be removed from any dashboard frame during the dashboard setup.

Once either of the two buttons above has been selected by the user then the system remembers its setting until the other button is selected.



Refresh button - refreshes the information contained within the dashboard frame. This is typically much faster than having the entire frame refreshed. We would recommend that users hit this refresh button whenever they want to see updated information in their frame.

Plug-ins. There are four unique types of plug-ins that each frame can display. While a frame can mix and match plugin types, we recommend that each frame only contain one plugin type. The plugin types are:

Note: As an administrator, you can easily copy a plugin that has been configured for another user to the current user's frame.

Data Drill - A data drill displays raw data from a filter in a drill down fashion. The filter can be all records or a very special record set. It can also contain key or reserve words which further help limit the data that is displayed.

Asset Hierarchy Trees - There are four types of Asset Trees that a user can define. You can expand the individual asset categories to see lists of the specific assets included. Module record counts will also be indicated. Users can click on the asset names to launch the associated asset records in the desktop application.

1. **Facility Sites** - this tree displays facility sites in the following hierarchical order: Sites, Buildings, Roof, Floor, Room, Door, and Furnishings. Associated Equipment assets will appear at each level in the hierarchy.
 2. **Facility Buildings** - this tree displays facility building information in the following hierarchical order: Buildings, Roof, Floor, Room, Door and Furnishings. Associated Equipment assets will appear at each level in the hierarchy.
 3. **Equipment** - this tree displays Equipment and its associated equipment.
 4. **Plant** - this tree displays Plant information in the following hierarchical order: Plant, Plant Processes, Equipment, Associated Equipment
-

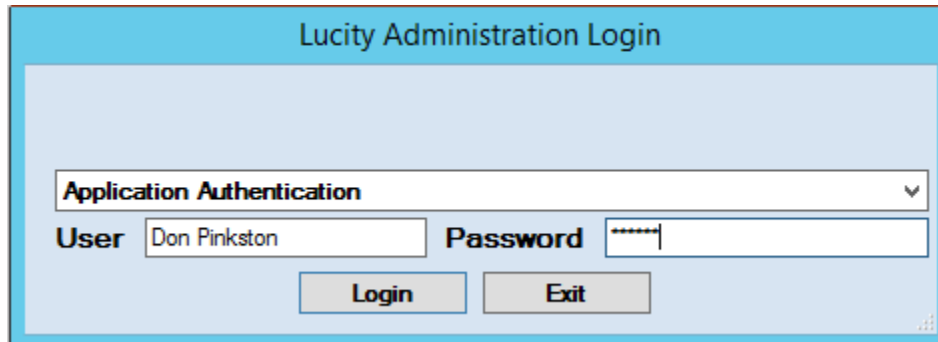
Reports - Users can view Crystal Reports in the frame. We recommend that these reports are formatted in such a way that fit inside the frame (or close to it).

RSS Feeds - RSS is a family of web feed formats used to publish frequently updated content such as news stories, blog entries, and podcasts in a standardized manner. An RSS document (called a "feed") contains either a summary of content from an associated web site or the full text. **Important!** While Lucy attempts to remove any scripting from RSS feeds before rendering them on the Dashboard, we cannot guarantee that external feeds are safe. When you or one of your users subscribes to a feed, they do so at their own risk.

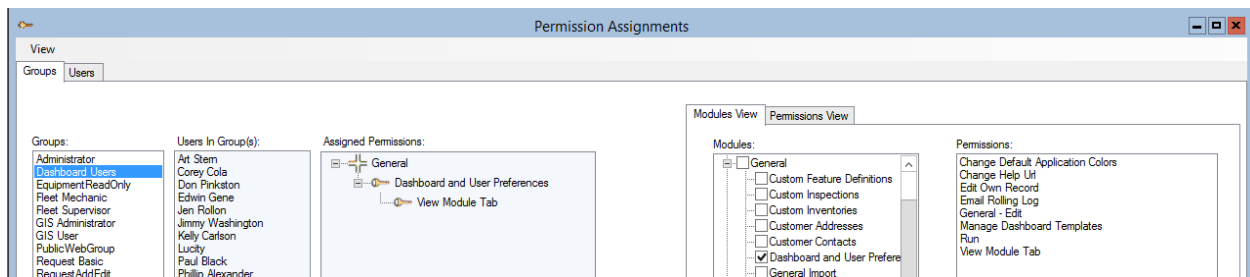
Now that we have some of the nomenclature out of the way, we can start learning how to create these dashboard pages.

Creating Custom Dashboard Pages - Version 14r2/15

To begin creating custom Dashboard pages, you'll need to login to the Lucy Administrative User Interface. This program is found with the Lucy Admin Tools and can be accessed using your Lucy username and password.



Before we begin creating Dashboard pages, we need to make sure that our users will have the appropriate permissions to run the dashboard and the web.



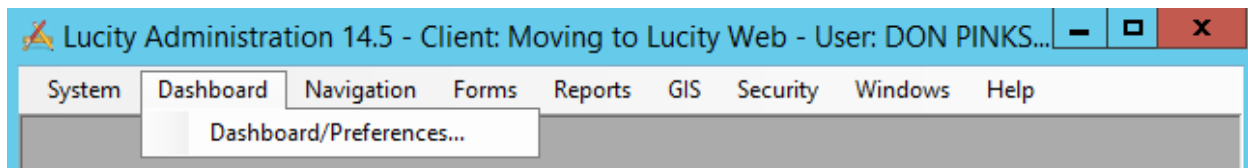
As can be seen by the above example, I have setup a Dashboard Users group and assigned that group the Run permission and the View Module Tab permission. This will allow users to use the dashboard and the modules menu for the modules that you give them permission to use. The other options are all optional:

- Change Default Application Colors: This allows the user to make the dashboard look however they want.
- Change Help URL: If you want someone to customize a help URL then give them access to this permission
- Edit Own Record: You might give someone permission to do this (a power user for instance) if you want them modifying their own dashboard. However, they will need to be properly trained.
- General - Edit: This permission gives the user the ability to change anyone's dashboard.
- Manage Dashboard Templates: Dashboard templates were created so that an administrator could create one dashboard and push it to multiple users.

Except for Edit Own Record the above permissions are typically reserved for the Dashboard Administrators.

Your final step would be to make sure that this Dashboard Users Group is provided to your users!

Access the Dashboard/Preferences by selecting **Dashboard>>Dashboard Preferences** from the UI Admin main menu:



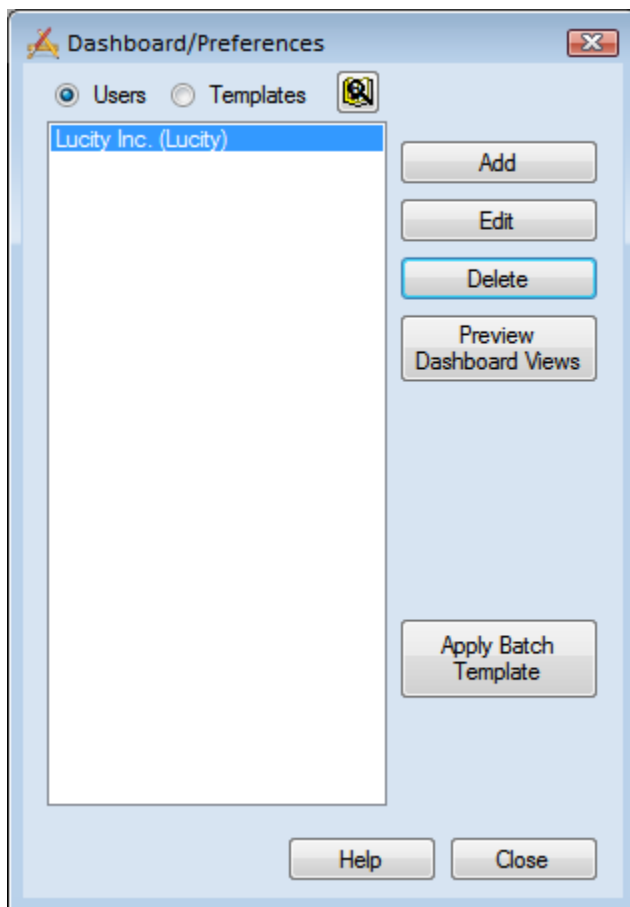
The Dashboard/Preferences will open. Over the following pages we'll walk you through a step-by-step example to add a new user's Dashboard page.

Example 1

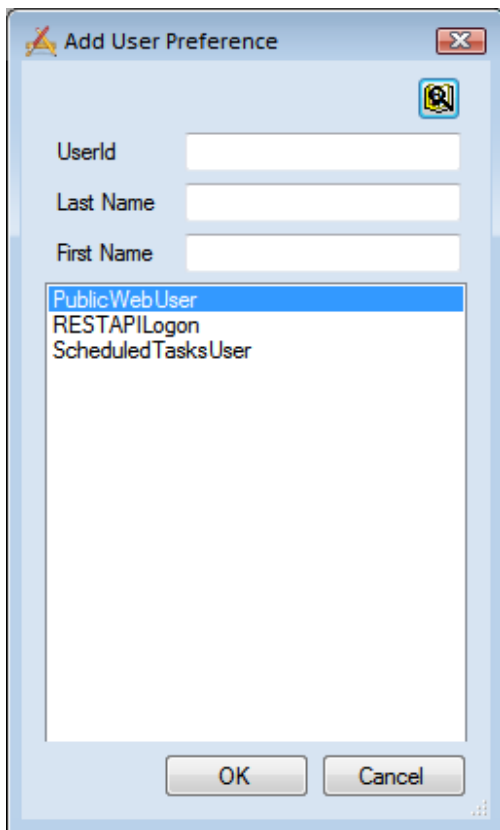
For our first example, we'll create a Dashboard page for Nick Roland, a Lead Worker. The first step in setting up a Dashboard page is to add users; afterwards you can edit or delete users.

Add User


1. Select the *Users* radio button at the top of the Dashboard/Preferences. All users with previously defined Dashboard settings will be displayed.



2. Click the *Add* button in the upper right-hand corner. The Add User Preference dialog will appear, allowing you to select the user for whom you plan to create a dashboard.

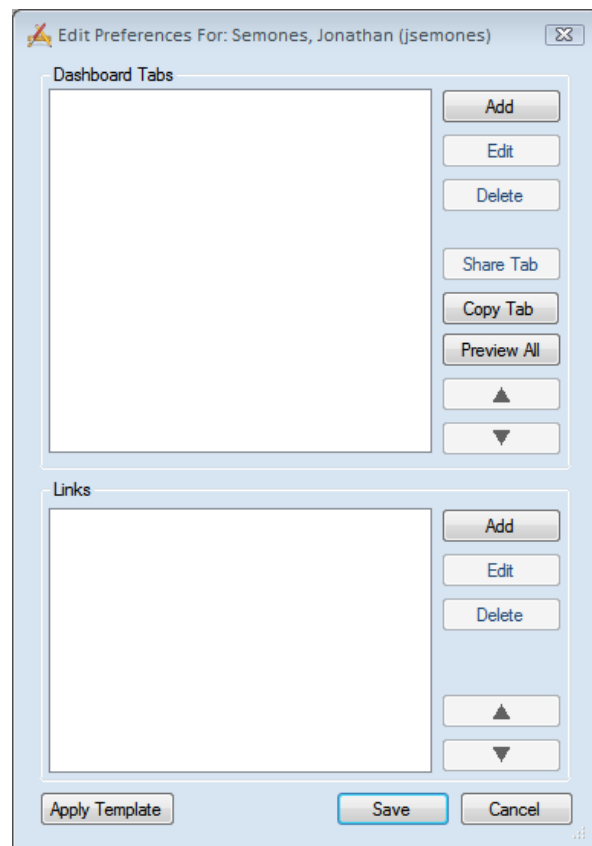


The 'Add User Preference' dialog box features a title bar with a close button. Below the title bar is a search icon. The main area contains three text input fields labeled 'UserId', 'Last Name', and 'First Name'. Below these fields is a list box containing three items: 'PublicWebUser', 'RESTAPILogon', and 'ScheduledTasksUser'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

3. Make sure that you understand how the Find button  works. If you have a long list, it gives you an opportunity to restrict the list to view a much smaller list.

By typing in a letter in the UserID, Last Name or First Name fields, the user list at the bottom automatically gets reduced to those users that meet the criteria typed. For instance, if J was typed in the First Name field below, two users would then remain - Jen Rollon and Jimmy Washington.

Under Dashboard Tabs, select *Add*. This will allow you to create a dashboard and add frames to the dashboard.



The 'Edit Preferences For: Semones, Jonathan (jsemones)' dialog box has a title bar with a close button. It is divided into two main sections: 'Dashboard Tabs' and 'Links'. Each section contains a large empty text area and a vertical stack of buttons: 'Add', 'Edit', 'Delete', 'Share Tab', 'Copy Tab', 'Preview All', and two arrow buttons (up and down). At the bottom of the dialog are 'Apply Template', 'Save', and 'Cancel' buttons.

Add a Dashboard View

To add a Dashboard Tab, click the *Add* button on the Add Dashboard Tab dialog. The following window will appear:

Frame Name	For Web	For Mobile	Mobile Offline Support
------------	---------	------------	------------------------

1. In the Name field, enter a unique name for the Dashboard Tab - say **“Work Orders/Requests”**. Each User can have multiple Tabs.
2. The Enable Refresh Rate (in Seconds) field allows you to enter a regular interval to automatically refresh the Dashboard. This refreshes all of the filters and reports on schedule. To enter a Refresh Rate, mark the Enable checkbox and type a value (in seconds) in the field provided.

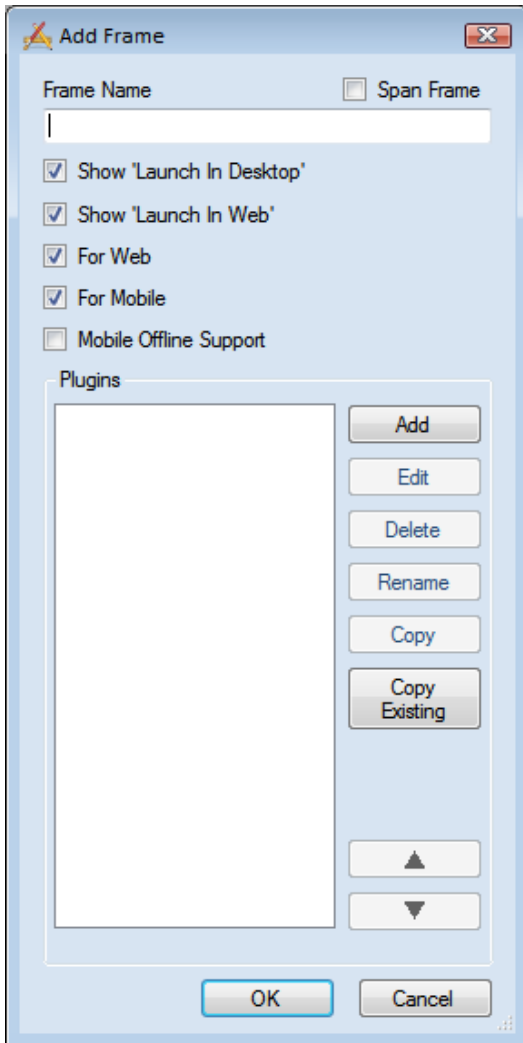
Note: By default, the system does not automatically refresh the data; instead, the user can manually refresh the system by pressing the Refresh link inside each Dashboard Frame. This is the recommended method for doing a system refresh

3. Click *OK* to save your changes.

Add Frame

1. Re-open the Dashboard Tab you created by clicking Edit
 - Every user can have multiple frames on the Dashboard page. A frame is simply a box containing specified groups of information. Frames can contain data drills, reports, asset hierarchy trees, and RSS feeds.
 - You can use the buttons alongside the grid to Edit and Delete frames, as well as change the order in which they appear on screen by using the Move Up and Move Down buttons.

2. Click the *Add* button beside the Frame grid. The Frame dialog will appear.



Definitions for the checkboxes:

- **Span Frame.** Typically Frames are paired together so that they are two across. If you want the frame to take up the width of two standard frames, then select the Span Frame checkbox. This will make the frame twice as wide
- **Show “Launch In Desktop”.** Enables (if checked) or hides (unchecked) the Launch in Desktop button in the Frame
- **Show “Launch in Web”.** Enables (if checked) or hides (unchecked) the Launch in Web button in the Frame
- **For Web.** Allows the frame to be displayed when in standard Web mode
- **For Mobile.** Allows the frame to be used with the Android or Apple table apps
- **Mobile Offline Support.** Allows the frame to be used when in mobile disconnected mode.

3. In the Frame Name field, type “**Nick Roland’s Open Work Orders**”.

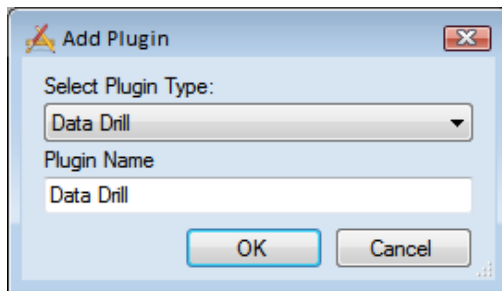
- Frame names are required. They appear in the frame headers on the Dashboard page and help users quickly identify the data stored in the frame.

Notes: _____

Add Data drill

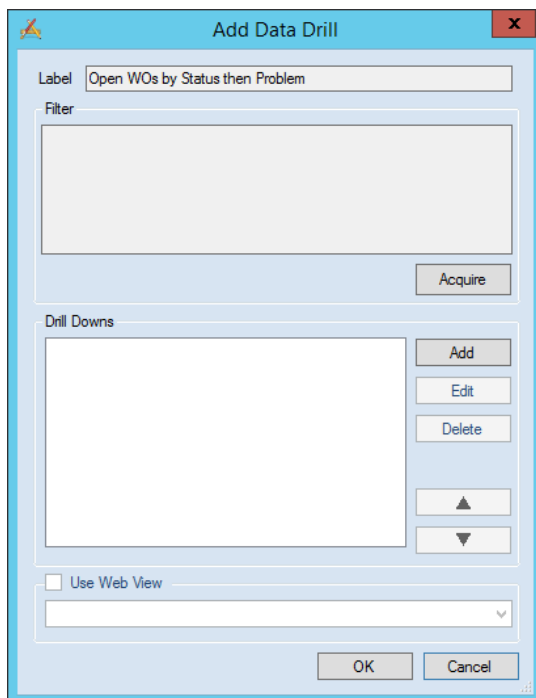
A data drill displays raw data from a filter in the form of a tree view. Each filter provides access to one or more *Lucity* modules. This allows the Dashboard to be Work Order based, Service Request based or Asset based. Most clients already have many filters that they have used for years with the Lucity Desktop product. All of those filters could be used or new ones could be created. Some examples of typical filters would be Open Work Order, Open Requests, etc.

1. Click the *Add* button in the Add Frame dialog. The following dialog will appear:



The Plugin Name would be the name of the Filter or some other special way to identify what information the drill down would contain - say **“Open Work Orders by Status then Problem”**.

2. From the drop down menu, choose plugin type you will be creating: data drill, asset hierarchy tree, crystal report, map, or RSS feed. Give the plugin a name. Click OK and the following dialog will appear for that plugin type. For this example, we will create a data drill.



3. Filters define the content of the root data displayed in the data drill. Click the *Acquire* button to access the Acquire Filter dialog:

4. Select the Work Order Manager from the *Program* dropdown list and Work Orders from the *Module* dropdown list.
5. Place a checkmark beside “Use or Modify an Existing Filter”.
6. Select “Nick Roland” as the Filter Author.
 - Most users will want to select their own login name as the Filter Author. The Filter Name dropdown will then display only the filters created using that login.
7. Select “Nick Roland Open Work Orders” from the Filter Name list. The SQL statement for this filter will be populated into the large text field.
 - Note that you can edit the information in this text field if you wish. Any changes made here will not impact the original filter inside the desktop application.
8. Click the Test “Where” button to confirm the filter. It will show how many records are returned when the filter is processed and indicate if any errors are detected.

Acquire Filter:

Program: Work Order Manager Component: Work Orders

☒ Use or Modify an Existing Filter:

Filter Author: Existing Filter: Filter Name:

Database Syntax

SELECT * FROM WKORDER

Select reserved word: Select A Reserved Word

Select table name: WKORDER

Select column name: Select A Column Name

Help

Roll over an item to see dynamic help.

Test "Where" OK Cancel

9. Click *OK* when you are satisfied with the filter.

10. The read-only filter string will be displayed at the top of the Data drill dialog. If you need to make additional changes to the filter, click the *Acquire* button again.

Add Data Drill

Label: Open WOs by Status then Problem

Filter:
WKORDER WHERE (WKORDER.WO_STAT_CD < 950 AND WKORDER.WO_SUPR_CD = '77')

Acquire

Drill Downs

Add Edit Delete

Use Web View

OK Cancel

11. Click *Add* in the Drill Downs section and select “Status Text” (WO_STAT_TY).
- These will appear as items under the original filter on the Dashboard page. This feature provides you with a way to sort the data as it appears on the page.
 - The first dropdown beside each drill displays the database tables in the filter.
 - The second dropdown beside each drill displays individual fields in the selected table. The field you choose here will be the field by which the data is sorted.

Add Drill Down

Table Name: WKORDER

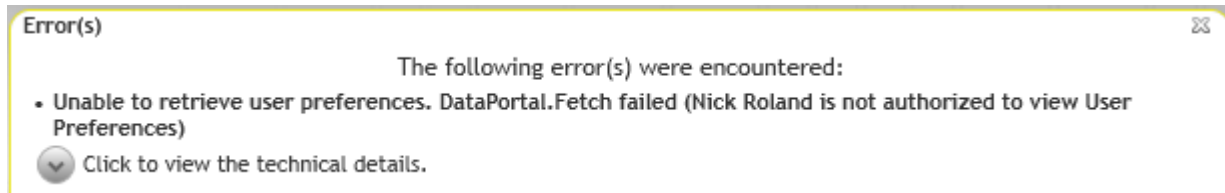
Column Name: Status Text (WO_STAT_TY)

OK Cancel

12. Click *OK*.
13. Click *Add* in the Drill Downs section and select “Problem Text” (WO_PROB_TY).
14. Click *OK*.
15. Click *OK* on the Data Drill, Frame dialog, and the Add Dashboard Tab dialog, then click *Save* on the Add Dashboard dialog.

Now, let’s save everything and open up Nick’s dashboard.

You will notice that it gives a weird error when opening:



This is because Nick does not yet have rights to view the dashboard. We need to go into the Security program and assign to him the Dashboard Users Group.

More Practice

Using the same filter from the last example (Nick Roland Open Work Orders), create additional data drills for:

- Open WOs by WO #
- Open WOs by Reason then Main Task

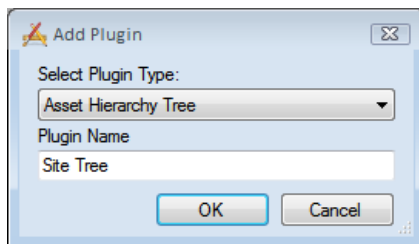
Notes: _____

Example 2

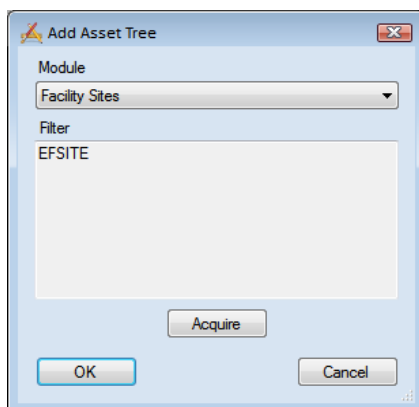
For our second example, we'll add an Asset Hierarchy Tree to Nick Roland's Dashboard page. Asset trees display facility assets in the following hierarchical order: Sites, Buildings, Roof, Floor, Room, Door, and Furnishings. Associated Equipment assets will appear at each level in the hierarchy. You can expand the individual asset categories to see lists of the specific assets included. Module record counts will also be indicated. Dashboard users can click on the asset names to launch the associated asset records in the Lucy Desktop application.

Add Asset Hierarchy Tree

1. Edit Nick Roland's Dashboard/Preferences.
2. Edit the existing Dashboard Tab.
3. Edit any of the Frames
4. Click *Add* in the Edit Frame section.



5. Select "Asset Hierarchy Tree" from the dropdown.
6. Enter the Plugin Name, "Site Tree" and click OK.
7. Select "Site Inventory" from the Module dropdown.
 - This determines the module entry point for the hierarchical display. You can choose to begin the hierarchy tree at the Site Inventory, Building Inventory, or Equipment Inventory level.



8. Click the *Acquire* button and select "Nick Roland's Responsibility" from the list of existing filters. Click *OK* in the Filter dialog.
 - This filter allows you to customize and limit the record set displayed from the hierarchy entry point.
 - Refer back to the steps on page 8 of this workbook to define a filter.
9. To accept your Asset Hierarchy settings, click *OK* on all dialogs and click *Save* on the Edit Dashboard dialog. Then, review the updated Dashboard page.

More Practice

For some additional practice, follow along with the exercises below to set up Dashboard pages for Juan Hernandez, a work supervisor. First, check Security to make sure he has rights.

Frame 1 - Requests

Create a new Frame with the following Data drills:

1. Open Requests by Problem then Asset
2. Open Requests by Status then Asset
3. Open Requests by Status then Problem
4. Open Requests by Request #
5. Open Requests by Asset then Problem

Frame 2 - Work Orders

Create a new Frame with the following Data drills:

1. Open WOs by Lead Worker then Status
2. Open WOs by Status then Lead Worker
3. Open WOs by Status then Main Task
4. Open WOs by Status then Problem
5. Open WOs by Lead Worker then Reason
6. Open WOs by WO #

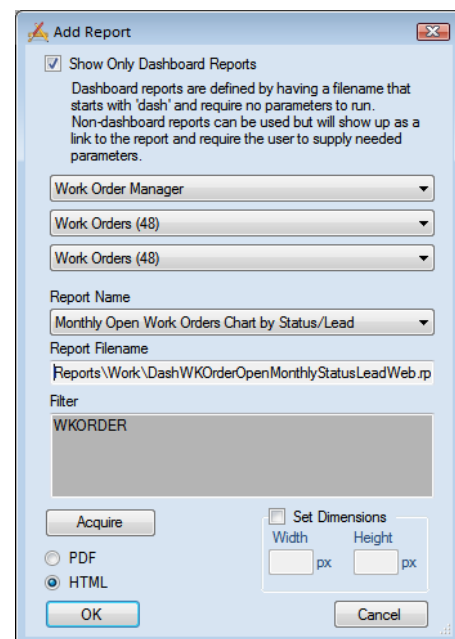
Dashboard Tab - Asset Hierarchy

Create a new Frame with an Asset Hierarchy Tree. Instead of starting at the “Site Inventory” level, begin with “Building Inventory”.

Dashboard Tab - Report

Create a new Frame with a Report.

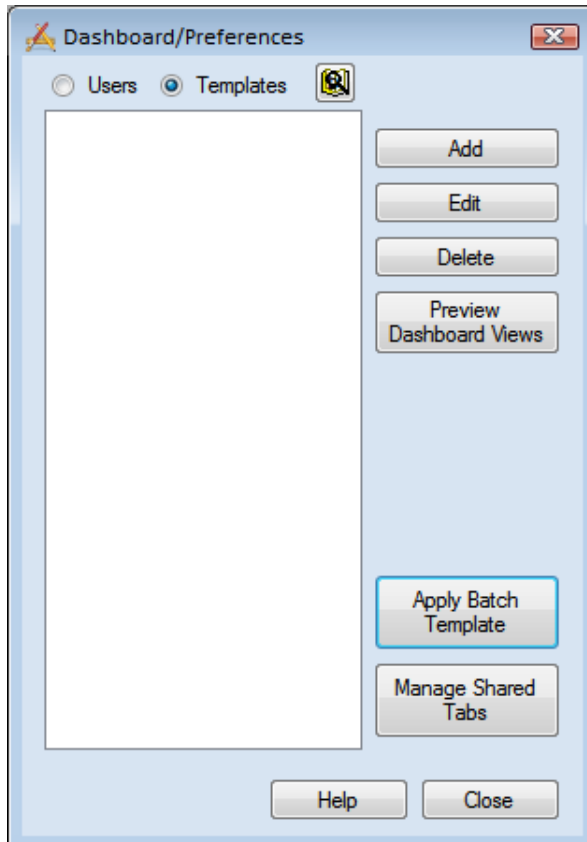
1. From Nick Roland’s Edit Dashboard dialog, click *Edit* on the Dashboard Tab, and edit on the Frame dialog.
2. Click *Add* in the Edit Frame and select Crystal Report.
3. Select “Work Order Manager” from the first dropdown menu and Work Orders from the Module and Module Component drop down lists.
 - This menu lists the modules that the reports connect to.
4. Select “Monthly Open Work Orders Chart by Status/Lead” from the next dropdown menu.
5. Mark the radio button beside HTML.
 - The PDF and HTML radio buttons allow you to indicate whether you’d like the report to appear in PDF or HTML format on the Dashboard page.
6. Click *OK* to accept your report settings.
7. Save your changes and open up the web app to view the dashboard you created.



Setting Up Templates - Version 14r2/15

Templates allow you to quickly apply pre-defined general settings to users' Dashboard pages. You can define Templates for groups of users with similar needs, and then customize individual settings for specific users. The process used to set up Dashboard Templates is very similar to the one used to set up Dashboard pages. We'll point out the minor differences in the example below.

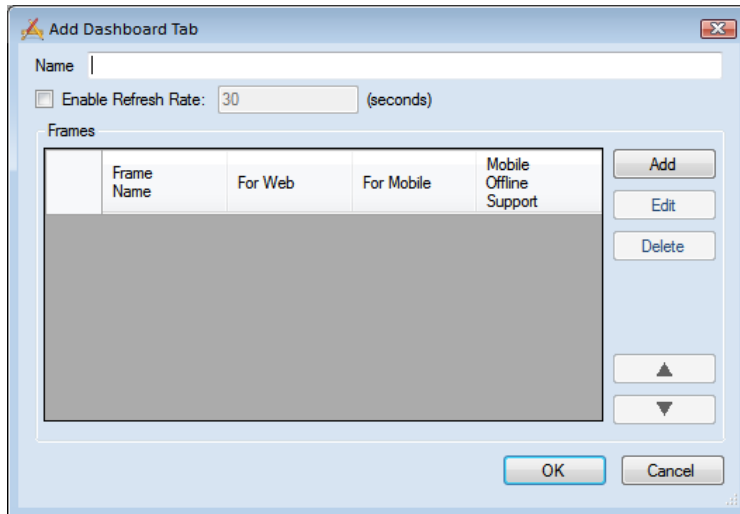
1. Select the *Templates* radio button at the top of the Dashboard/Preferences. The list of available Templates will be displayed.



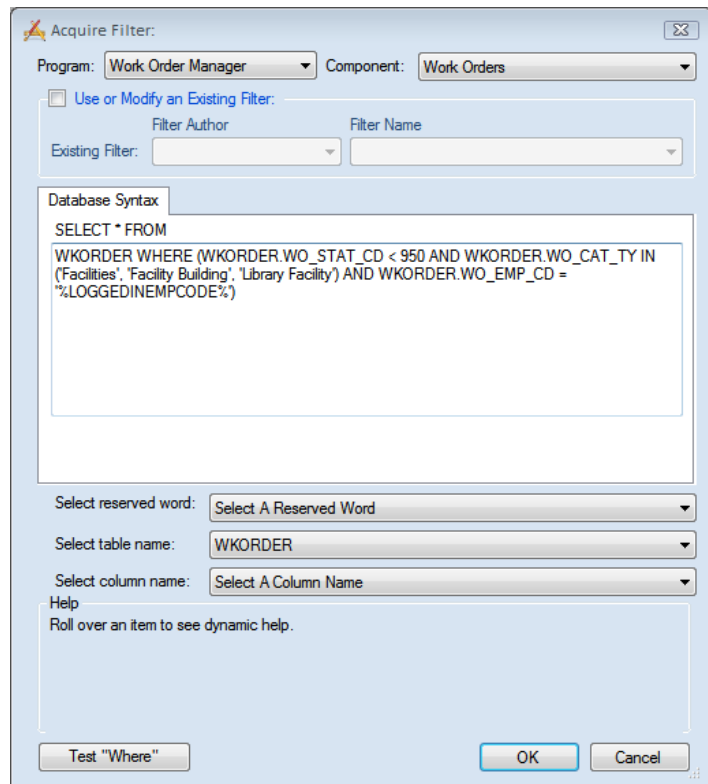
2. Click the *Add* button in the upper right-hand corner.
3. You will be asked to give the template a name, type "Facility Lead Workers" in the name field. This will be the name of the template. Click *OK*.

Notes: _____

4. You'll follow the same steps to add Frames and Data drills for Templates as you did for individual users: Add a Dashboard Tab, then a frame, then click add and choose Data Drill. Then, in the Data drills dialog, click the *Acquire* button. We'll go over a specific filter example on the following pages.



5. In the Acquire Filter dialog, select the module, filter author, and filter name as you did before. The SQL statement will be populated in the Database Syntax tab.
6. Add the following string to the end of the SQL statement so that the entire filter string resembles the one in the image below:
 - AND
WKORDER.WO_EMP_CD='%LOGGEDINEMPCODE%'
 - This is an example of a field that has a special function when used in Dashboard filters. When either '%LOGGEDINEMPCODE%' or '%LOGGEDINUSERID%' is added to a Dashboard filter, the system automatically replaces those strings with the Work Employee Code or Login ID of the currently logged in user, respectively.



A list of all reserve words is included at the end of this section. The Select Column Name helps you find the field name that you want to match up to the reserve word. In the example above, the WKORDER.WO_EMP_CD is found in the Select Column Name by finding Lead Worker.

The Select table name may have two or more tables together if they are properly joined. To join two tables, the Filter needs to be modified.

Example 1: WKORDER INNERJOIN WKWOTSK ON WO_ID=WT_WO_ID WHERE ... would bring in both the WKORDER (the main Work Order table) and WKWOTSK tables (the Work Order Subtask table).

Example 2: WKORDER INNERJOIN WKRESRCE ON WO_ID=WR_WO_ID WHERE... would bring in both the WKORDER and WKRESRCE table (the Work Order Resources table).

7. Add the following two Data drills using the above filter:

- Open Work Orders by Status then Problem

The image shows two side-by-side 'Add Drill Down' dialog boxes. Both have a title bar with a yellow triangle icon and standard window controls. The first dialog box has 'Table Name' set to 'WKORDER' and 'Column Name' set to 'Status Text (WO_STAT_TY)'. The second dialog box has 'Table Name' set to 'WKORDER' and 'Column Name' set to 'Problem Text (WO_PROB_TY)'. Both have 'OK' and 'Cancel' buttons at the bottom.

- Open Work Orders by WO#

The image shows a single 'Add Drill Down' dialog box. It has a title bar with a yellow triangle icon and standard window controls. The 'Table Name' is set to 'WKORDER' and the 'Column Name' is set to 'Work Order # (WO_NUMBER)'. It has 'OK' and 'Cancel' buttons at the bottom.

8. Add a second frame for “Site Tree”; begin the Asset Hierarchy Tree at the Site Inventory level.

9. Save the Template.

Note: Make sure you include any links that you want inside the template if you want all of the recipients to have the links.

Applying Templates to Users

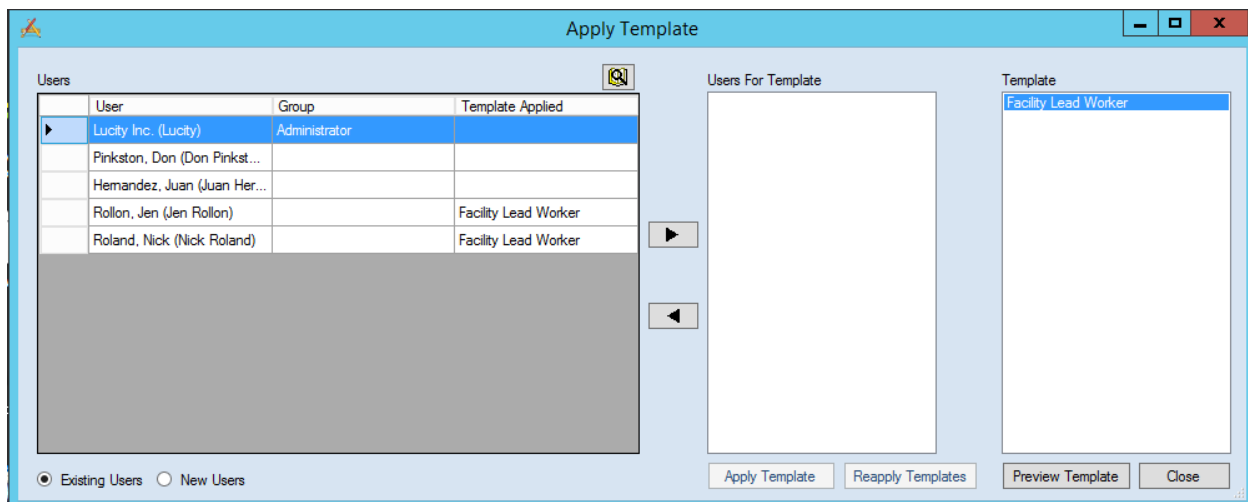
Now that you've successfully created a Template, we'll go over the steps to apply that template to a new user.

1. In the Dashboard/Preferences, add Jen Rollon as a new user.
 - Select the *Users* radio button and click the *Add* button.
 - In the Settings dialog, select "Jen Rollon" from the Name dropdown list.
2. Select "Facility Lead Workers" from the dropdown list.
3. Click the *Apply Template* button in the bottom left corner.
 - The Frames and Data drills found in the "Facility Lead Workers" template will be added to Jen Rollon's Dashboard settings (see image at bottom of page).
4. To see these settings, run the website, logging in as Jen Rollon.

Applying Batch Templates

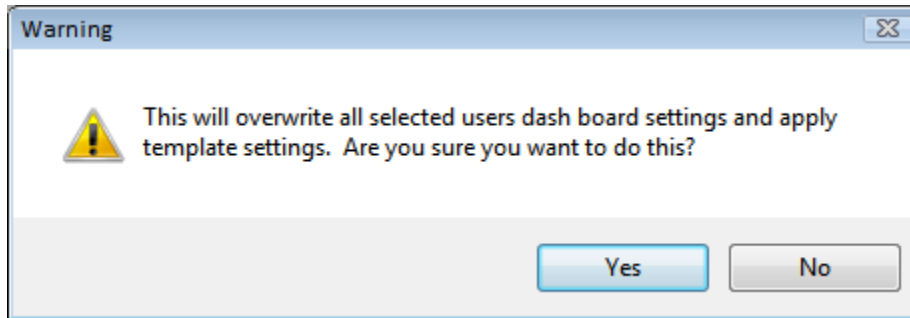
You can apply Templates to multiple users at a single time by using the *Apply Batch Template* function. We'll go over a specific example in a few moments, but first we'll modify the existing "Facility Lead Workers" template.

1. On the Dashboard/Preferences, click the *Apply Batch Template* button. The Apply Template dialog will appear.

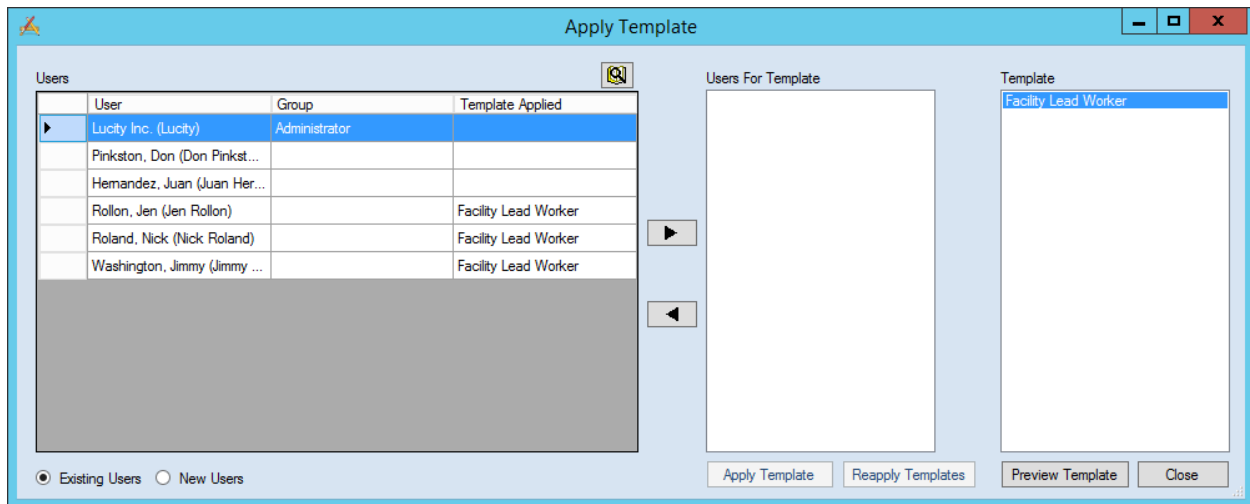


2. The radio button for *Existing Users* is the default. This shows every user who currently has had a Dashboard defined.
3. From the "Users" column, select Jen Rollon and Nick Roland. They'll be added to the "Users for Template" list by highlighting them and then hitting the move to right arrow.

- Highlight “Facility Lead Workers” in the Template list and click *Apply Template*. The following message will appear. It informs you that this process will overwrite the Dashboard settings for the selected users and apply the Template settings. Click Yes to continue.



- Now, select the *New Users* radio button. Users without Dashboard settings will be displayed in the list.
- From the “Users” column, select Jimmy Washington. He’ll be added to the “Users for Template” list.
- Highlight “Facility Lead Workers” in the Template List and click *Apply Template*. The above message will appear. Click Yes to continue.
- Now, run the website logging in as Nick, Jen, or Jimmy to view the Dashboard page.



You will notice that after applying the template the Template Applied Column is filled in. This will help you if you ever want to update this template and reapply it to the same users.

Setting up Shared Tabs - Version 14r2/15

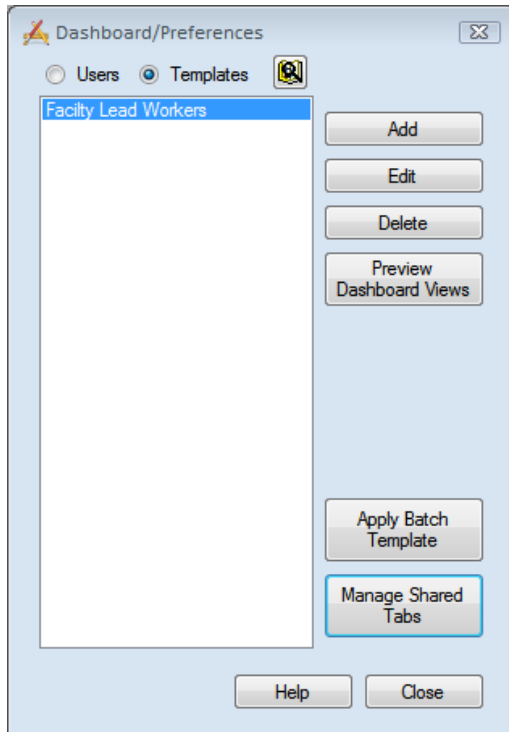
Shared tabs allow you to create a single dashboard tab and then assign it to a group of users. Unlike a template once a shared tab is applied all changes to the shared tab will immediately appear on each related user’s dashboard (this requires a refresh). These tabs can be applied to any dashboard or template.

This allows individual users to have custom dashboards, while giving admins the ability to provide groups of people a specific set of information.

Creating Shared Tabs

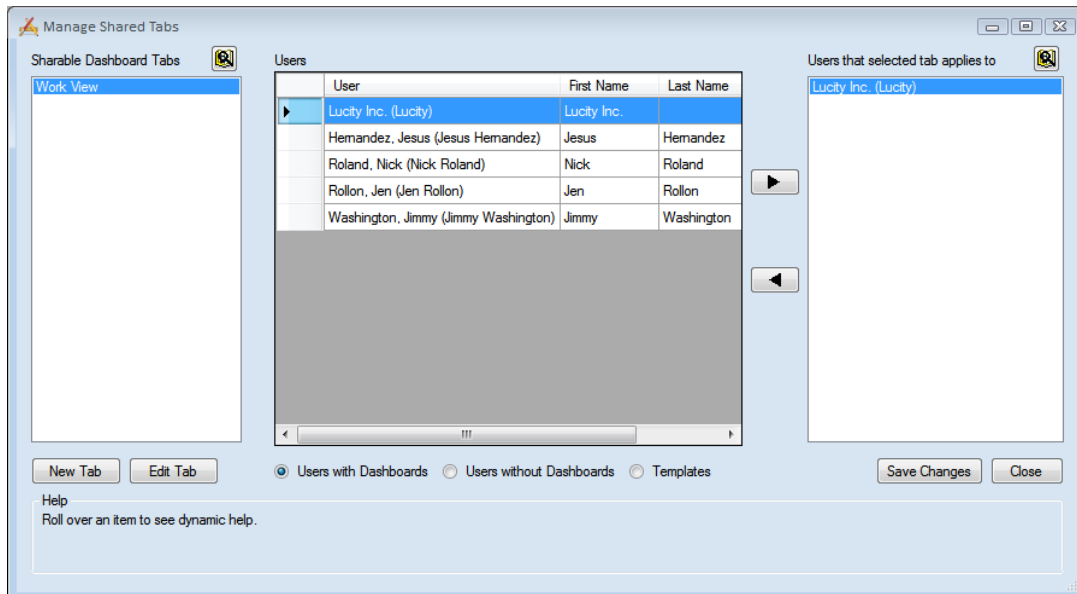
Use the following steps to create a shared tab:

1. Open up the Dashboard/Preferences dialog and switch to Templates at the top.



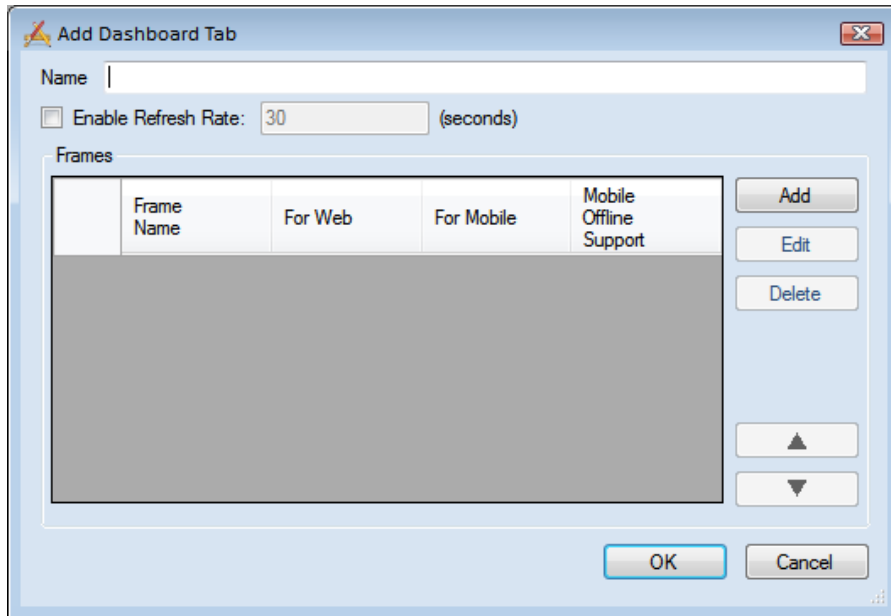
2. Click the Manage Shared Tabs button that appears near the bottom right.

3. The following pop-up will appear



4. The pane on the left contains a list of all the shared tabs. Click the **New Tab** button at the bottom left. The Add Dashboard Tab dialog will appear.

5. You'll follow the same steps to add Frames and Data drills for shared as you did for individual users and templates: Add a Dashboard Tab, then a frame, then click add and choose Data Drill. Then, in the Data drills dialog, click the *Acquire* button. We'll re-use the filter example on the following pages.



6. In the Acquire Filter dialog, select the module, filter author, and filter name as you did before. The SQL statement will be populated in the Database Syntax tab.
7. Add the following string to the end of the SQL statement so that the entire filter string resembles the one in the image below:
 - AND WKORDER.WO_EMP_CD='%LOGGEDINEMPCODE%'
 - This is an example of a field that has a special function when used in Dashboard filters. When either '%LOGGEDINEMPCODE%' or '%LOGGEDINUSERID%' is added to a Dashboard filter, the system automatically replaces those strings with the Work Employee Code or Login ID of the currently logged in user, respectively.

Notes: _____

Acquire Filter:

Program: **Work Order Manager** Component: **Work Orders**

☐ Use or Modify an Existing Filter:

Filter Author: Filter Name:

Existing Filter:

Database Syntax

SELECT * FROM
 WKORDER WHERE (WKORDER.WO_STAT_CD < 950 AND WKORDER.WO_CAT_TY IN
 ('Facilities', 'Facility Building', 'Library Facility') AND WKORDER.WO_EMP_CD =
 '%LOGGEDINEMPCODE%')

Select reserved word: **Select A Reserved Word**

Select table name: **WKORDER**

Select column name: **Select A Column Name**

Help
 Roll over an item to see dynamic help.

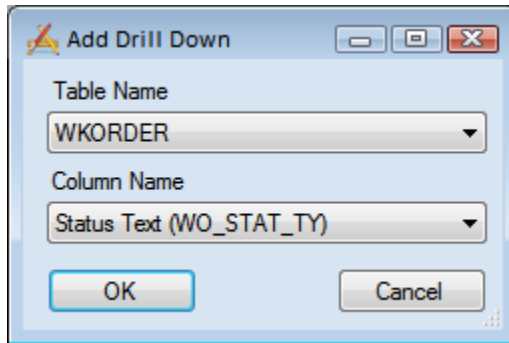
Test "Where" OK Cancel

- A list of all reserve words is included at the end of this manual. The Select Column Name helps you find the field name that you want to match up to the reserve word. In the example above, the WKORDER.WO_EMP_CD is found in the Select Column Name by finding Lead Worker.
- The Select table name may have two or more tables together if they are properly joined. To join two tables, the Filter needs to be modified.
- Example 1: WKORDER INNERJOIN WKWOTSK ON WO_ID=WT_WO_ID WHERE ... would bring in both the WKORDER (the main Work Order table) and WKWOTSK tables (the Work Order Subtask table).
- Example 2: WKORDER INNERJOIN WKRESRCE ON WO_ID=WR_WO_ID WHERE... would bring in both the WKORDER and WKRESRCE table (the Work Order Resources table).

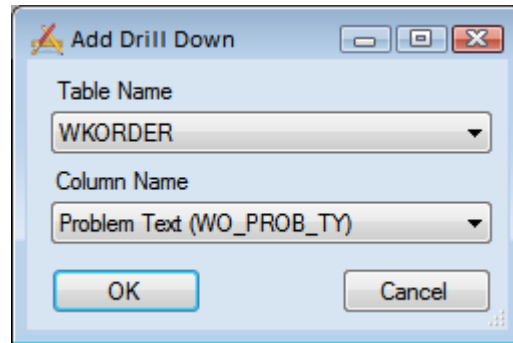
Notes:_____

8. Add the following two Data drills using the above filter:

- Open Work Orders by Status then Problem

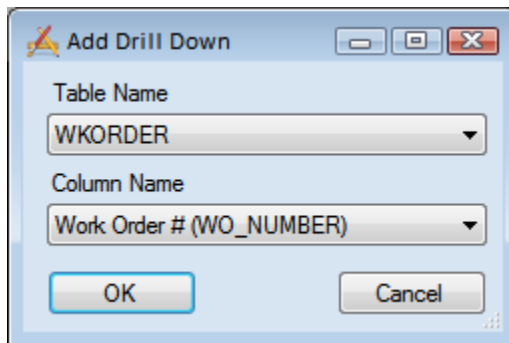


The dialog box is titled "Add Drill Down". It has a "Table Name" dropdown menu with "WKORDER" selected. Below it is a "Column Name" dropdown menu with "Status Text (WO_STAT_TY)" selected. At the bottom are "OK" and "Cancel" buttons.



The dialog box is titled "Add Drill Down". It has a "Table Name" dropdown menu with "WKORDER" selected. Below it is a "Column Name" dropdown menu with "Problem Text (WO_PROB_TY)" selected. At the bottom are "OK" and "Cancel" buttons.

- Open Work Orders by WO#



The dialog box is titled "Add Drill Down". It has a "Table Name" dropdown menu with "WKORDER" selected. Below it is a "Column Name" dropdown menu with "Work Order # (WO_NUMBER)" selected. At the bottom are "OK" and "Cancel" buttons.

9. Add a second frame for “Site Tree”; begin the Asset Hierarchy Tree at the Site Inventory level.

10. Save the Template.

Note: Make sure you include any links that you want inside the template if you want all of the recipients to have the links.

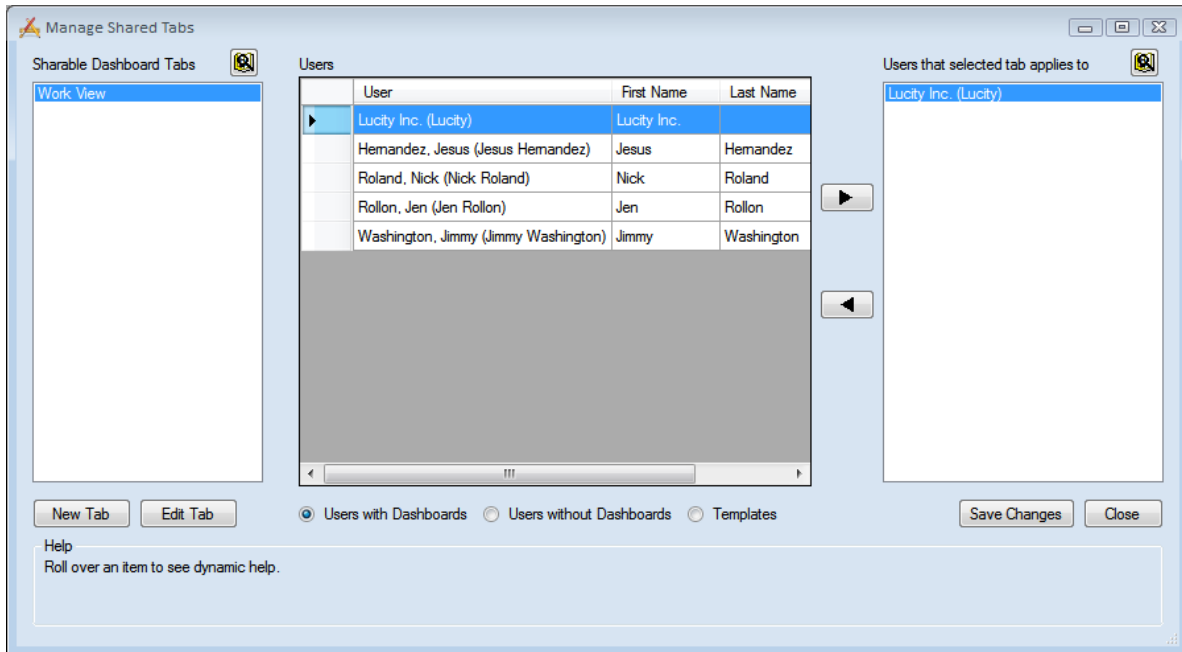
Assigning Shared Tabs


Once you have created your shared tab we need to assign it to some users.

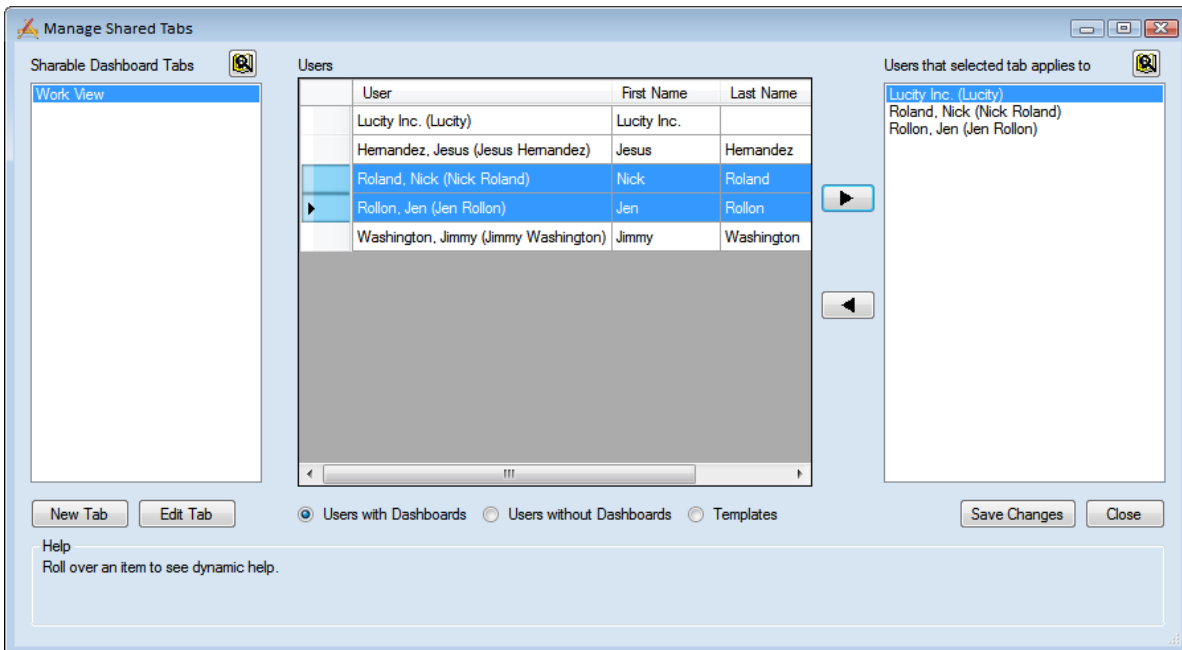
1. Back on the Manage Shared Tabs dialog select the shared tab in the left pane.
2. Now in the middle pane find some users to apply that tab to.

Notes: _____

- This pane defaults to a list of *Users with Dashboards*. However it can also show *Users without Dashboards* and *Templates*. If a shared tab is applied to a user without a dashboard the system will create a dashboard for the user and then assign the shared tab to their dashboard.



3. Select Nick Roland, and Jen Rollon in the users list and click the  button.
4. Their names will now appear in the right pane.
 - The right pane displays a list of all users that the shared tab is currently applied to.



5. Click **Save Changes**. The tab is now added as the last Dashboard Tab on their Dashboard.
 - Any changes made to tab after this will be reflected on Nick and Jen's dashboards.

Security Settings

All users with login names established in the Lucy Security.exe can access the UI Admin program; however, in order to perform certain functions the following permissions will need to be granted.

Dashboard

These permissions can be found in the General - Dashboard and User Preference section.

Permission Name	Purpose	Setting
Change Default Application Colors	Allows you to change the color settings on your dashboard. This does not impact changing the Font size. The user always has the ability to edit the Font size	Off
Change Help URL	Allows you to change the URL address for the help documentation. This should only be enabled for administrators.	On
Edit Own Record	Allows you to modify your own Dashboard page.	On
General - Edit	Allows you to modify anyone's Dashboard settings. This should only be enabled for administrators.	On
Manage Dashboard Templates	Allows you to modify Dashboard Templates and assign Templates to Users. This should only be enabled for administrators.	Off

Web Forms

These permissions can be found in the General - System Configuration section.

Permission Name	Purpose	Setting
System Configuration	Allows you to perform administrative functions such as creating custom forms and grids, adding forms to menus, adding users to the Dashboard, etc.	On
Assign Windows Accounts	Allows administrators to assign Windows domain accounts to Lucy user accounts (used for integrated security).	On

More Practice

Practice setting security permissions for the following individuals:

- Juan Hernandez (#38) - Supervisor
- Jen Rollon (#77) - Lead Worker
- Jimmy Washington (#1101) - Lead Worker

Filter Reserve Word list and Definitions

'%LOGGEDINUSERID%' - This maps to the Initials field in the USER_INFO table. When this string is used in a filter, the system automatically replaces it with the Lucity Login ID of the currently logged in user.

'%LOGGEDINEMPCODE%' - You must own Work to use this string. It maps to the EM_EMPL_CD field in the WKUEMP table. When this string is used in a filter, the system automatically replaces it with the Work Employee Code of the currently logged in user. In order to use this string, the Logon ID (EM_EMPLID) needs to match the employee's Initials in USER_INFO and the employee record needs to be active.

'%FISCALYEAR%' - You must own Work to use this string. It uses the current fiscal year from the Planning and Budgeting, Fiscal Year module in the Desktop application.

'%CURRENTYEAR%' - Inserts the current calendar year.

'%CURRENTQUARTER%' - Inserts the current quarter.

'%CURRENTDAY%' - Inserts the current day.

'%CURRENTWEEK%' - Inserts the current week. There is also a '%CURRENTWEEK1%' through '%CURRENTWEEK7%' allowing users to set the starting day for the current week with 1=Sunday and 7=Saturday. %CURRENTWEEK% = %CURRENTWEEK1%

'%FIRSTHALFOFTHEMONTH%' - Inserts the first half of the month (days 1-15).

'%SECONDDHALFOFTHEMONTH%' - Inserts the second half of the month (days 15-31).

'%CURRENTMONTH%' - Inserts the current month.

'%ONEWEEKAHEAD%' - Inserts the next week.

'%TWOWEEKSAHEAD%' - Inserts the next two weeks.

'%ONEWEEKAHEADANDBEFORE%' - Inserts the next week plus previous timespan. For example, you may use this string to query for all existing open work orders as well as those that are open/due in the next week.

'%TWOWEEKSAHEADANDBEFORE%' - Inserts the next two weeks plus previous timespan.

'%PREVIOUSYEAR%', '%PREVIOUSMONTH%', '%PREVIOUSWEEK%' and '%PREVIOUSDAY%' also work.

'%LAST(X,Y)%' - Inserts a range of dates (X) going backward in time starting a given number of days (Y) prior to the current date.

'%NEXT(X,Y)%' - Inserts a range of dates (X) going forward in time starting a given number of days (Y) following to the current date.

'%TODAY%' - Inserts today's date

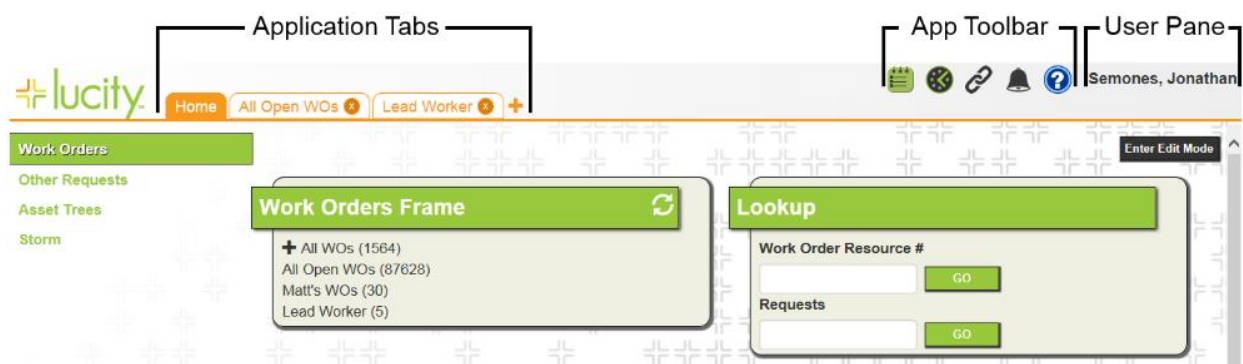
Note: When using the reserved words above, make sure that you enter them in all uppercase letters and enclose them in percent symbols (%) and single quotes (').

Restrictions: Dashboard filters cannot contain ORDER BY clauses. The program will strip out the ORDER BY clause if you try to use one. Additionally, if you are using a Filter to access the Desktop application, be sure that WHERE clauses are in uppercase. This is required for the desktop app.

This list has grown over time and will continue to grow. Please see the Lucity Administration manual for the latest list (and examples of each). Search on **Reserve Word**.

Dashboard Layout - Version 15r2/16/16r2


Everything is still there with 15r2/16/16r2, we have simply rearranged things slightly with the goal of making things more intuitive.



Application Tabs

A row of tabs runs across the top of the tool. Each tab is an open Dashboard, or View. Click on a tab to switch to it and display its contents. Users can open an unlimited number of application tabs.

Home Tab Displays the current user's dashboard. This tab cannot be closed and is always the left-most tab.




Other Tabs Other tabs display views into different modules and timesheets. These tabs can be closed by clicking the .




Note: For Administrators these tabs can also display other user's 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.

Application Toolbar

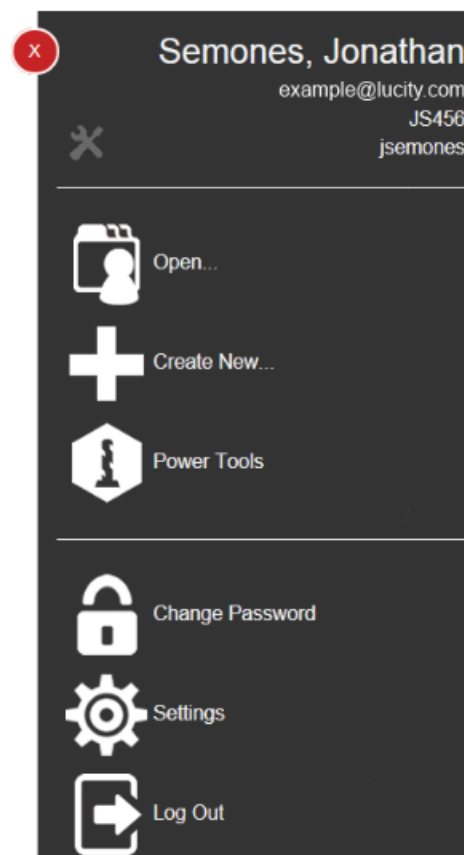
These are tools that appear at the top of the program. They provide information and quick access to different parts of the Lucy program.












Icon	Tool	Description
	Work Scheduler	This button launches the Work Order Scheduler. The Work Order Scheduler allows users to manage work orders in a calendar view.
	Webmap	The Web Map icon launches the Web map in a new browser window.
	Time Sheet	The Time sheet button launches the Time sheet or provides a drop-down list of time sheets if multiple options are available

		to the user.
	Links	The Links icon displays a drop-down list of links to web content outside Lucy Web.
	Notifications	<p>Displays a drop down list of all the notifications the user has received during the current session.</p> <p>A number will appear over the icon indicating how many notifications there are.</p> <p>Click the X next to a notification to dismiss it.</p>
	Help	<p>The Help icon provides a drop-down list of help options, including:</p> <ul style="list-style-type: none"> ▪ Lucy Help - Launches the Web Help Guide. ▪ Lucy Help Portal and Search - Launches the Lucy Help portal to view/search all the help guides. ▪ About Lucy - Displays the product version and service pack being used. ▪ E-mail Support - Starts an email to Lucy Support. ▪ Lucy on the Web - Launches the Lucy Support Center, a Webex support session, or Lucy.com.

User Pane

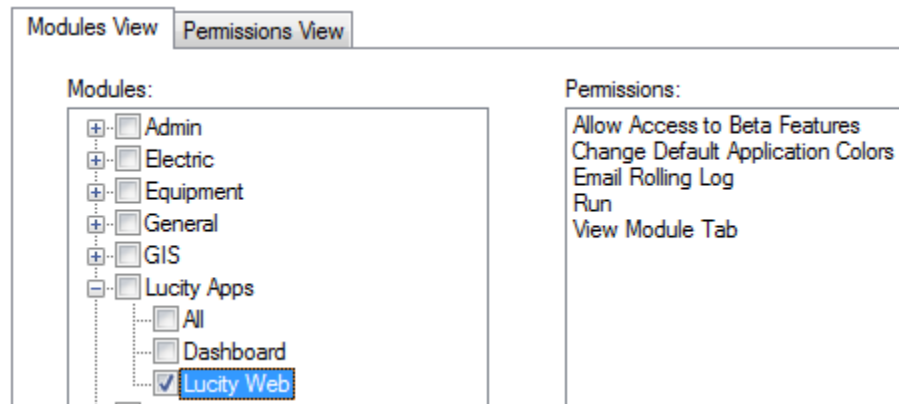
The **User Pane** provides user and admin options and tool. It is opened by clicking on the user's name in the top right corner of the screen.



User information	User's Name	Shows the user's last and first names.
	Users Email Address	Identifies the email address linked to the user. This relationship is established in the Security program.
	Default Group	Indicates the Default Rules Group to which the user is assigned. Some parts of the application will display differently based on this group and the current settings.
	Employee Code	Displays the employee code linked to the user's login. This relationship is established in the Work Flow Setup > Employee module.
	Login ID	Displays the username for the current user.
	 Troubleshooting Tools	Provides the following tools: <ul style="list-style-type: none"> • Send Server Logs - Enables the user to export Lucity server logs via email to an address he or she designates. Emails sent this way are generated by the system and provide no information about who is sending them. Because the email will not indicate whose logs they are it should not be emailed directly to Lucity Support. • View Licenses in Use - Lists the licenses the current user is using. (Does not appear if you use ELA or Name User Licenses) • Send Data Statistics - Allows users to manually send data statistics to Lucity. • Clear Local Preferences -  This tool requires the Lucity Apps > Lucity Web > Email Rolling Log permission.
Admin Controls	 Close	Closes the user pane.
	 Open...	Allows admins to open another user's dashboard, a shared tab, a group of shared tabs, or a timesheet. The admin can then view these objects or modify them.
	 Create new...	Allows admins to create a new dashboard, a new shared tab, a new shared tab group, or a new timesheet.
	 Power Tools	Provides admins tools to Manage Shared tabs and Assign Links.
 These tools require the Admin > Lucity App Admin > Run permission.		
User Controls	 Change Password *	Enables the user to change his or her Lucity password. Note: This option only appears if the user is logged in using application authentication (not Windows authentication).
	 Settings	The settings tool enables individual users to customize colors and font sizes for themselves within the web application.  This tool requires the Lucity Apps > Lucity Web > Change Default Application Colors permission.
	 Logout	Disconnects the user from the application and ends the session.

Creating Custom Dashboard Pages - Version 15r2/16/16r2

To create custom dashboard pages for yourself or any other staff member, you must first have the proper permissions.



To run Lucity Web (which includes the Dashboard), all users will need to have Run permissions for Lucity Web.

To make edits to individual dashboards, the user will need to have permissions to

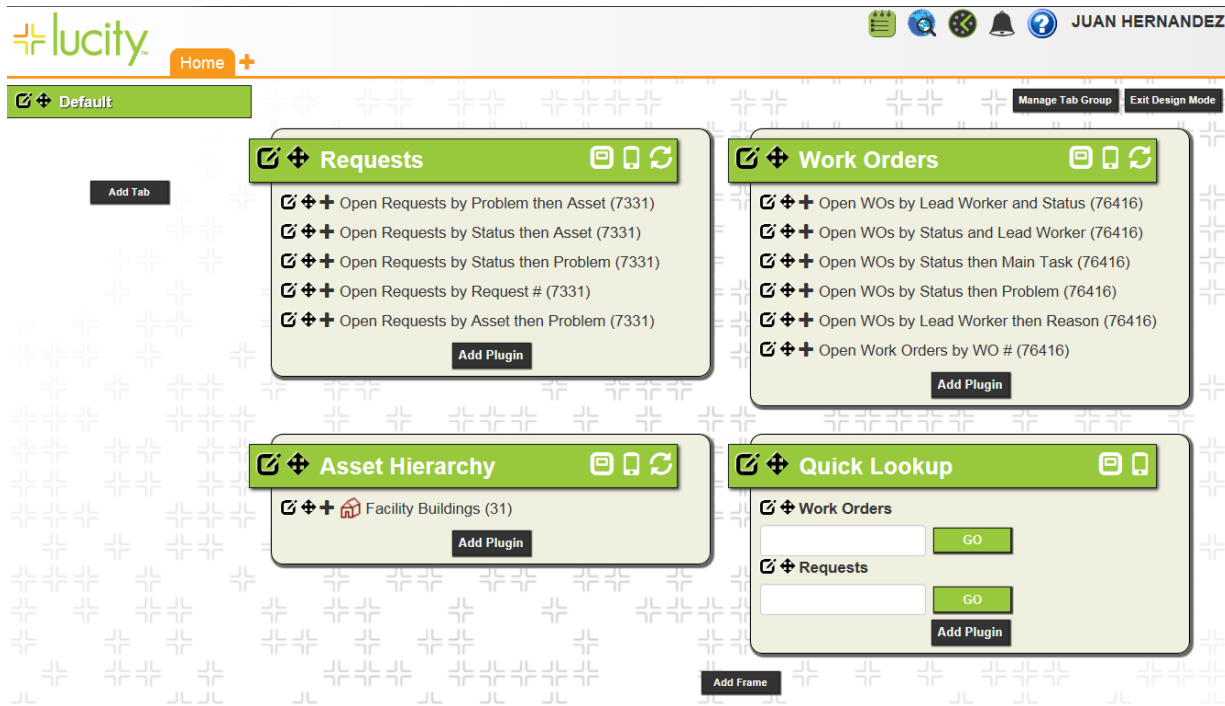
- Edit Own Record (this gives them permissions to modify their own dashboard)
- General Edit (this gives them permissions to modify other's dashboards)
- Allowed to Configure Plugin with URL (if they are using the URL dashboard to set up SSRS reports or something similar).

Once permissions are setup, logging in to create custom Dashboard Pages will be just like logging into the Web application. If the user has rights to modify their own dashboard or other's dashboards, then they will have the "Enter Design Mode" button in the upper right.

Enter Design Mode

Notes: _____

By clicking the Enter Design Mode, the dashboard changes as shown below:



This is a true What You See is What You Get (WYSIWYG) design platform.

A mix of buttons and symbols allow users to make modifications.

First the buttons:

Add Plugin

- Allows users to add additional Plugins to the selected frame.

Add Frame

- Allows users to add additional Frames to the selected Dashboard tab.

Add Tab

- Allows users to add additional Dashboard Tabs.

Manage Tab Group

- Allows users to control which Shared Tab Group is assigned to the dashboard.

Exit Design Mode

- Allows users to exit the Design Mode. It is important to note that all modifications made while in Edit mode get applied immediately (Exit Design Mode is not a “Save Changes function”).

Now the Symbols:



This is an edit symbol. When this is selected, Lucity will open up the editing dialog for the related component. Once in edit mode, the system works very similarly to Version 14r2/15.



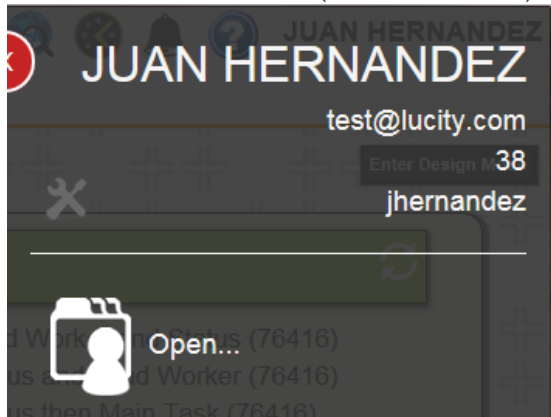
This is a Reorder symbol. It allows the user to move the selected feature around in the tab or frame.

With this information, a user can quickly create new Dashboard Tabs, new frames, new plugins or make whatever changes are needed.

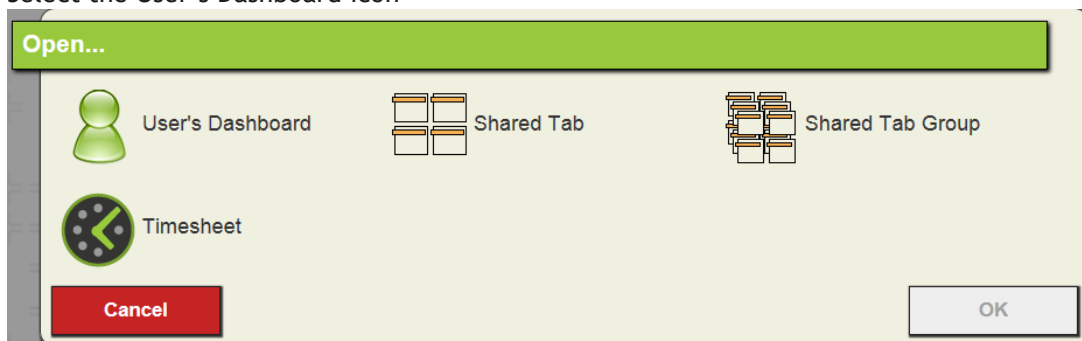
To demonstrate it, we will create the same Dashboard we did for Release 14r2/15 for Nick Roland.

Open a Dashboard for Editing

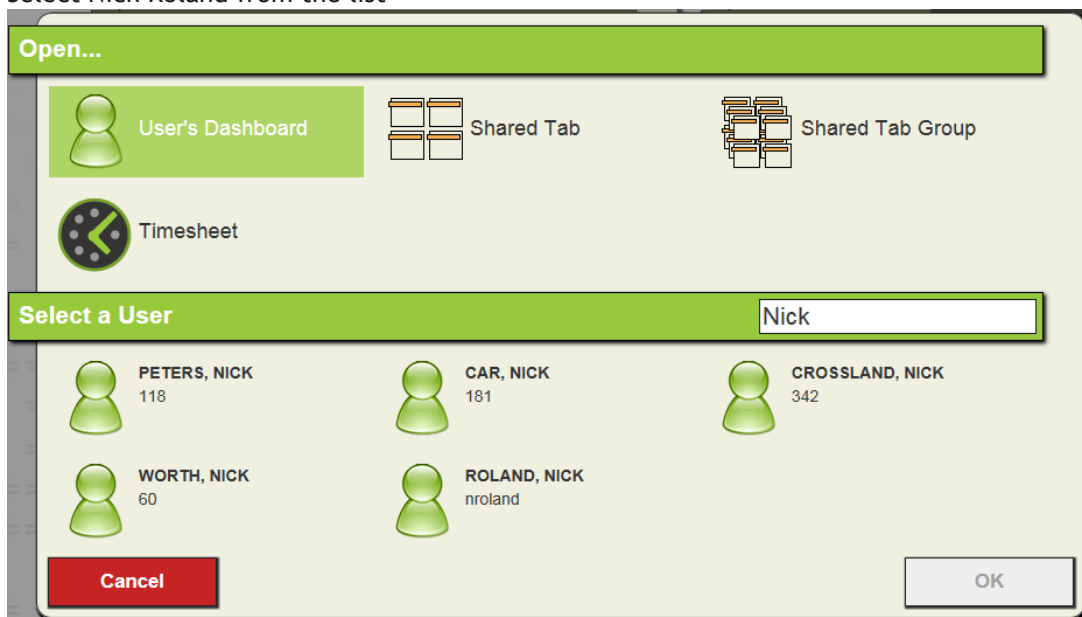
- a. Click on Juan Hernandez (in the User Pane) and then hit Open



- b. Select the User's Dashboard icon



- c. Select Nick Roland from the list



- d. You will see Nick's Dashboard appear as an Application Tab.

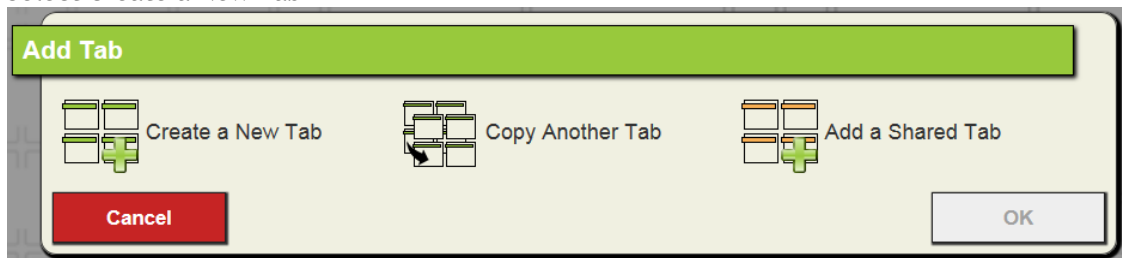


- e. Open that Tab and Enter Design Mode

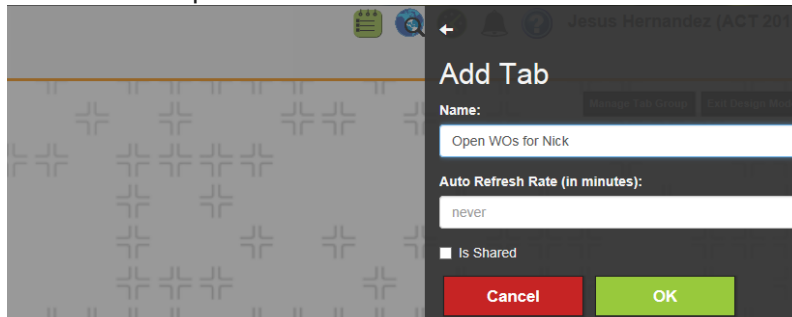


Add a new Tab

- a. Use the **Add Tab** button
- b. Select Create a New Tab



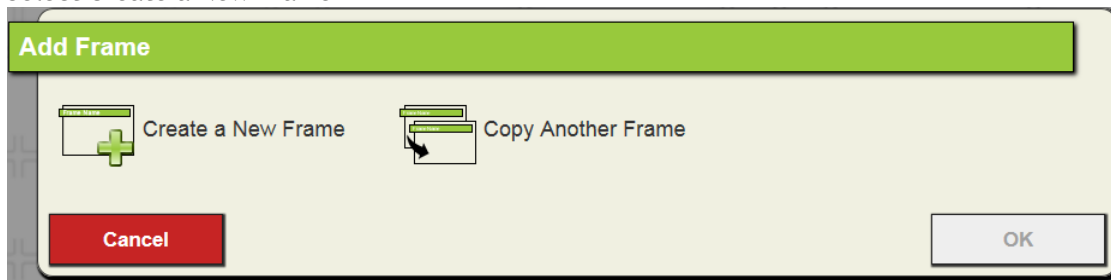
- c. Call the Tab "Open WOs for Nick"



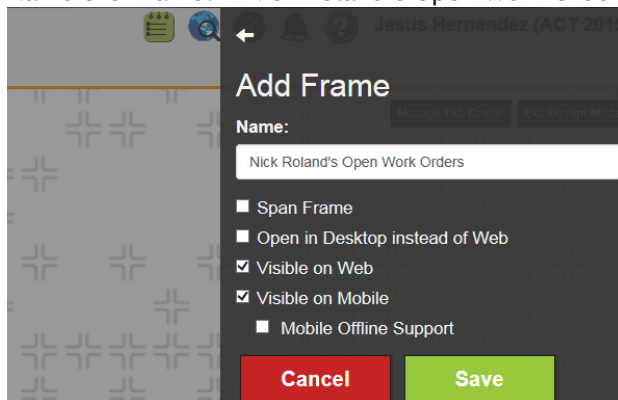
Notes: _____



Add a new Frame

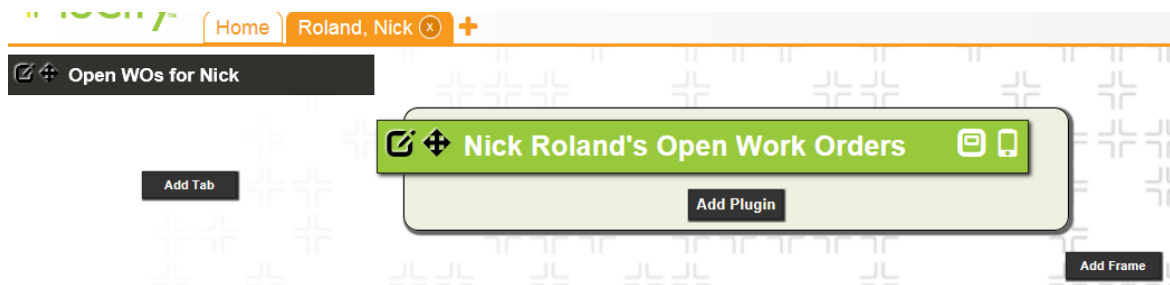
- Use the **Add Frame** button
- Select Create a New Frame



- Name the Frame: “Nick Roland’s Open Work Orders”

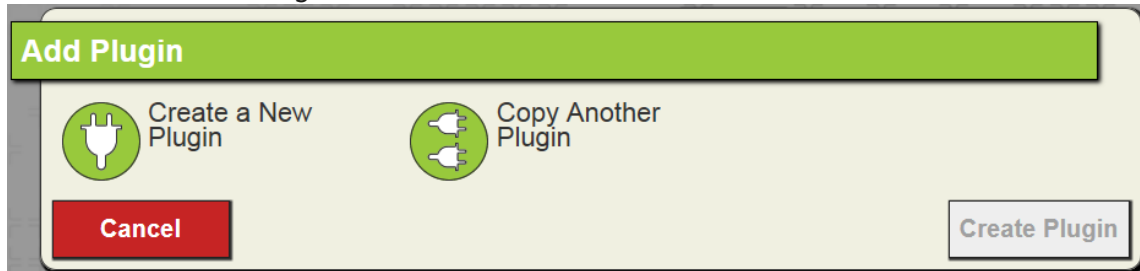


- Span Frame - Leave blank (for No)
- Open in Desktop instead of Web - leave blank
- Visible on Web - leave checked (for Yes) - You can tell in the frame if this is active if the symbol  appears next to the frame’s title.
- Visible for Mobile (Your preference) - this allows this frame to be sent to the mobile device for Nick when he logs into his tablet. You can tell in the frame if this is active if the symbol  appears next to the frame’s title.
 - Mobile Offline Support - not an option if it is not visible for Mobile.
- Hit Save (this closes the dialog)

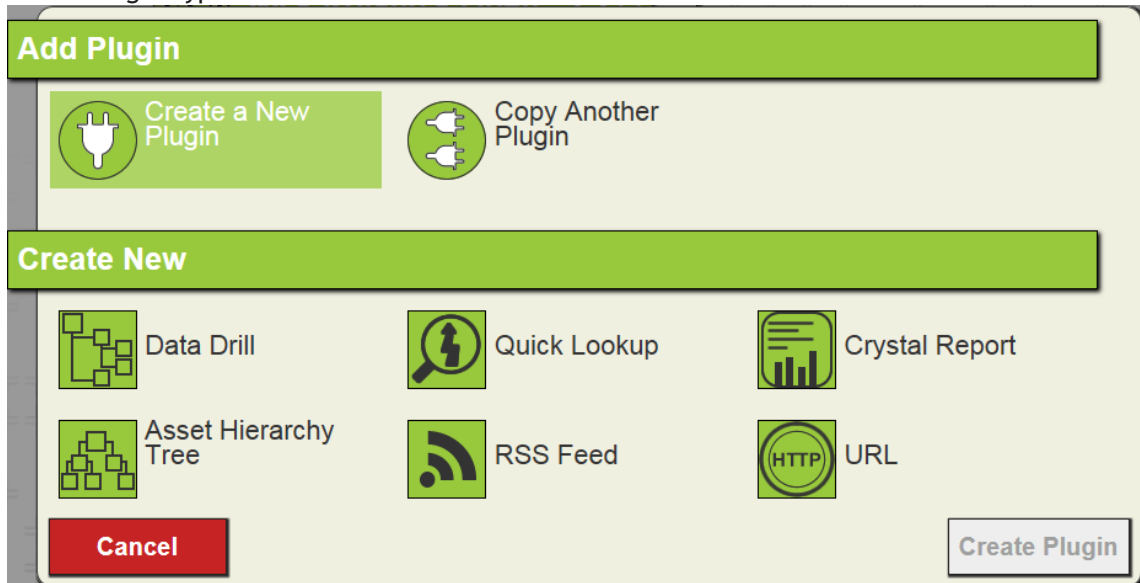


Add a new Plugin

1. Use the **Add Plugin** button.
2. Select Create a New Plugin



3. Select Plugin Type.



Notes: _____

Data Drills

1. Give the Data Drill a name: “Open Work Orders by Status then Problem”

The screenshot shows a dark-themed dialog box titled "Add Data Drill". At the top, there is a header bar with a back arrow, a bell icon, a question mark icon, and the text "Jesus Hernandez (ACT 2015)". Below the header, the title "Add Data Drill" is displayed in large white text. To the right of the title are two buttons: "Manage Tab Group" and "Exit Design Mode". The "Name:" label is followed by a text input field containing the text "Open Work Orders by Status then Problem". Below this, the "Filter:" label is followed by a large, empty light gray rectangular area. Under the filter area is a green "Acquire" button. The "Drill Downs:" label is followed by a vertical list of actions: "Add", "Edit", "Delete", "Move Up", and "Move Down", each in a light gray button. To the left of these buttons is a vertical scrollbar with up and down arrow icons. At the bottom of the dialog are two large buttons: a red "Cancel" button and a light gray "Save" button.

Jesus Hernandez (ACT 2015)

Add Data Drill

Manage Tab Group Exit Design Mode

Name:

Open Work Orders by Status then Problem

Filter:

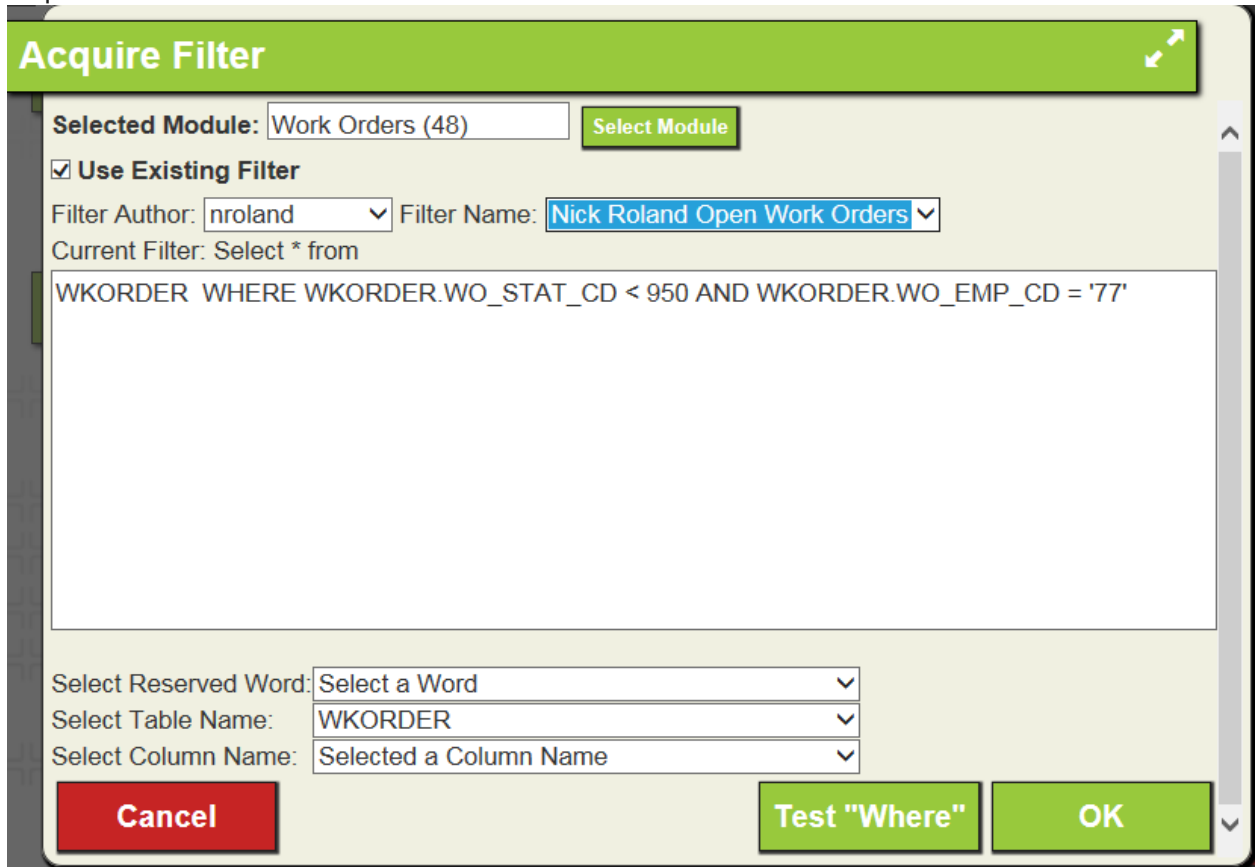
Acquire

Drill Downs:

Add Edit Delete Move Up Move Down

Cancel Save

2. Acquire Filter



The 'Acquire Filter' dialog box has a green title bar. It contains a 'Selected Module' field with 'Work Orders (48)' and a 'Select Module' button. Below is a checked 'Use Existing Filter' checkbox. The 'Filter Author' is 'nroland' and the 'Filter Name' is 'Nick Roland Open Work Orders'. The 'Current Filter' is 'Select * from' followed by a large text area containing the SQL query: 'WKORDER WHERE WKORDER.WO_STAT_CD < 950 AND WKORDER.WO_EMP_CD = '77''. At the bottom, there are three dropdown menus: 'Select Reserved Word' (Select a Word), 'Select Table Name' (WKORDER), and 'Select Column Name' (Selected a Column Name). Action buttons include a red 'Cancel', a green 'Test "Where"', and a green 'OK'.

Acquire Filter

Selected Module: Work Orders (48) Select Module

☒ Use Existing Filter

Filter Author: nroland Filter Name: Nick Roland Open Work Orders

Current Filter: Select * from

WKORDER WHERE WKORDER.WO_STAT_CD < 950 AND WKORDER.WO_EMP_CD = '77'

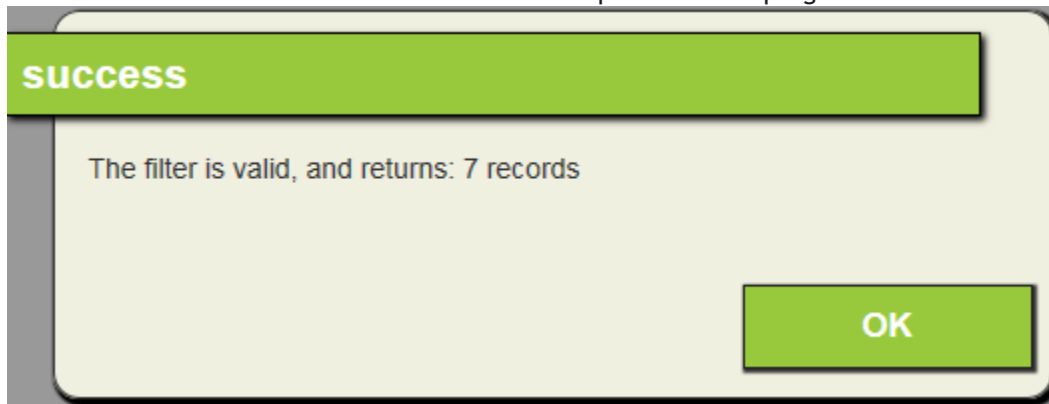
Select Reserved Word: Select a Word

Select Table Name: WKORDER

Select Column Name: Selected a Column Name

Cancel Test "Where" OK

3. Test "Where" to make sure that the filter is acceptable to the program



The 'Success' dialog box has a green title bar. It contains a message: 'The filter is valid, and returns: 7 records'. At the bottom right is a green 'OK' button.

Success

The filter is valid, and returns: 7 records

OK

4. Hit OK on the Acquire Filter Dialog

5. Add Drill Downs

The 'Add Drill Down' dialog box has a green header with the title 'Add Drill Down'. It contains two dropdown menus: 'Select Table Name:' with 'WKORDER' selected, and 'Select Column Name:' with 'Status Text (WO_STAT_TY)' selected. At the bottom are 'Cancel' and 'OK' buttons. Below the dialog is a 'Drill Downs:' list showing 'WKORDER - WO_STAT_TY' and 'WKORDER - WO_PROB_TY'. To the right of the list are 'Add' and 'Edit' buttons.

6. If you want to open up a specific view for Work Orders when Nick launches the web view, then select it using the "Select Custom View"

The 'Select Custom View' dropdown menu shows 'Eval Work Order Complete' as the selected option.

7. Save the Data Drill

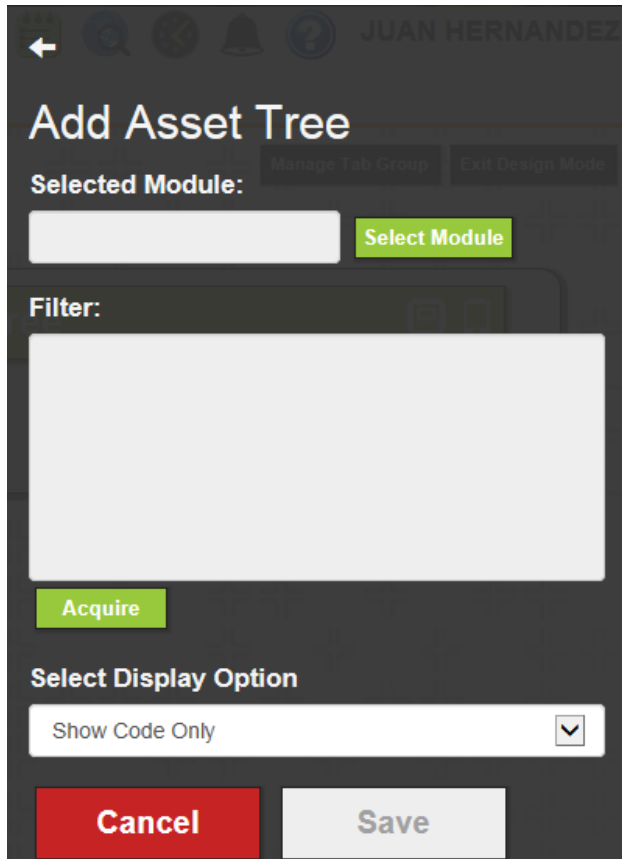
The dashboard design interface shows a tab titled 'Open WOs for Nick'. A new data drill is being added, titled 'Nick Roland's Open Work Orders'. The drill's description is 'Open Work Orders by Status then Problem (7)'. There is an 'Add Plugin' button below the drill. An 'Add Frame' button is visible at the bottom right.

8. Add additional Plugins as necessary.
9. Exit Design Mode.

Now we will Create Dashboards and/or Frames to show how the other 5 Plugin types work. No more screen shots will be shown unless they have not yet been displayed.

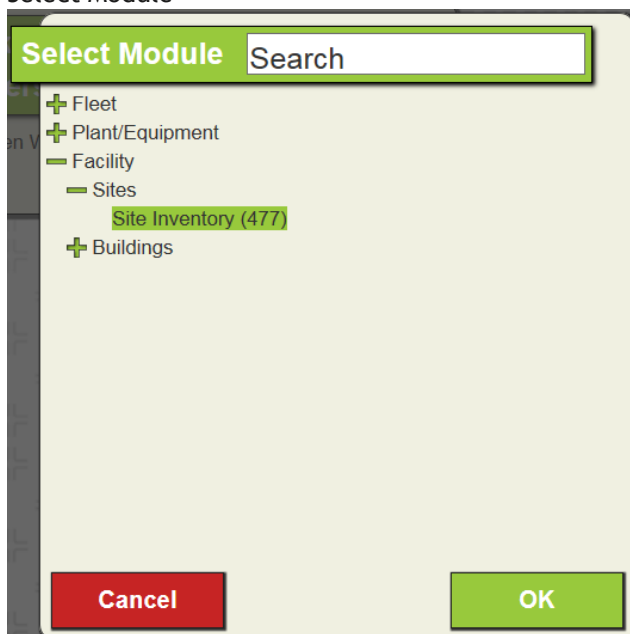
ASSET HIERARCHY TREE

1. Add Frame named "Site Tree"
2. Add a new Plugin and Create New Asset Hierarchy Tree
3. Add Asset Tree



The screenshot shows the 'Add Asset Tree' dialog box. At the top, there is a header bar with a back arrow, search, and notification icons, and the name 'JUAN HERNANDEZ'. Below the header, the title 'Add Asset Tree' is displayed. Underneath, there is a 'Selected Module:' label followed by a text input field and a green 'Select Module' button. Below this is a 'Filter:' label followed by a large, empty text input area. At the bottom left of the input area is a green 'Acquire' button. Below the input area is a 'Select Display Option' label followed by a dropdown menu showing 'Show Code Only' and a downward arrow. At the very bottom are two buttons: a red 'Cancel' button and a grey 'Save' button.

4. Select Module



The screenshot shows the 'Select Module' dialog box. It has a title bar with 'Select Module' and a search input field. Below the title bar is a list of modules with expand/collapse icons: '+ Fleet', '+ Plant/Equipment', '- Facility', '- Sites', 'Site Inventory (477)', and '+ Buildings'. The 'Site Inventory (477)' item is highlighted with a green background. At the bottom are two buttons: a red 'Cancel' button and a green 'OK' button.

5. Acquire/Create Filter - In this case we will select a pre-defined filter called “Nick Roland’s Responsibility”
6. Select Display Option (new for Version 15r2/16/16r2). Users can now select to Show Code, Show Text or Show Code and Text

Add Asset Tree

Selected Module:

Facility Sites (477) **Select Module**

Filter:

EFSITE WHERE EFSITE.ST_SUPERV = 'Nick Roland'

Acquire

Select Display Option

Show Code and Text ▼

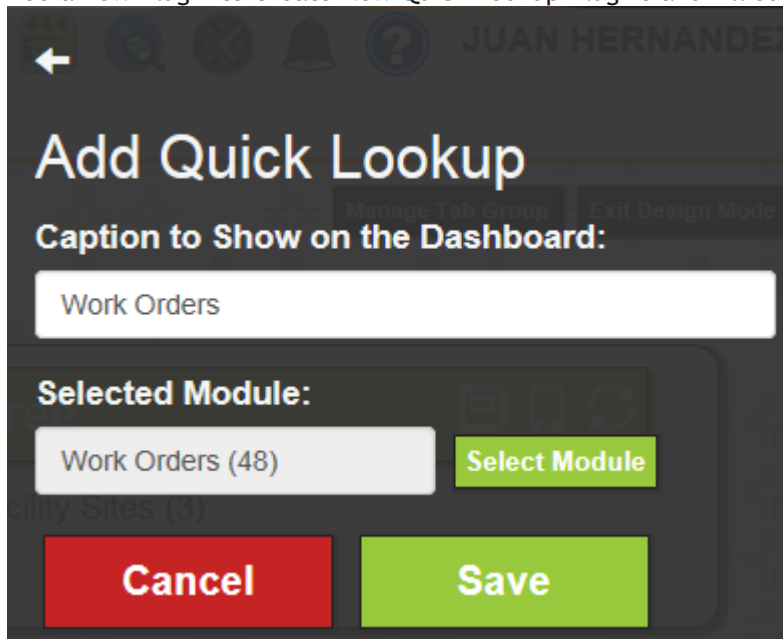
Cancel **Save**

7. Save

Notes: _____

QUICK LOOKUP

1. Add Frame named “Quick Lookups”
2. Add a new Plugin to Create New Quick Lookup Plugins and fill out information as shown



3. Add as many lookups as you want.

Notes: _____

CRYSTAL REPORT

1. Add Frame named Crystal Report
2. Add a new Plugin to create new Crystal Report Plugins

The screenshot shows a dark-themed 'Add Report' dialog box. At the top, there's a title bar with a back arrow, several icons, and the name 'Troy Moffitt'. The main title 'Add Report' is in a large, bold font. Below it, the 'Selected Module:' section has a text input field containing 'Work Orders' and a green 'Select Module' button. The 'Report Name:' section features a dropdown menu with the text 'Monthly Open Work Orders Chart by Status/Task' and a downward arrow. The 'Filter:' section contains a large text area with the SQL query: 'WKORDER WHERE (WKORDER.WO_STAT_CD < 951) AND (WKORDER.WO_SUPR_CD = '77')'. Below the filter, there's a green 'Acquire' button. The 'View' section has three radio buttons: 'Basic View' (selected), 'Linked Report', and 'Advanced View'. Each radio button is followed by a description: 'First 20 Pages' for Basic View, 'A link that opens the first 20 pages in another tab.' for Linked Report, and 'Display one page at a time, but not limited to the first 20 pages.' for Advanced View. There's also a checkbox for 'Set Dimensions'. At the bottom, there are two large buttons: a red 'Cancel' button and a green 'Save' button.

← [Icons] Troy Moffitt

Add Report

Manage Users Manage Tab Group Exit Design Mode

Selected Module:

Work Orders **Select Module**

Report Name:

Monthly Open Work Orders Chart by Status/Task ▼

Filter:

WKORDER WHERE (WKORDER.WO_STAT_CD < 951) AND (WKORDER.WO_SUPR_CD = '77')

Acquire

☒ **Basic View**
First 20 Pages

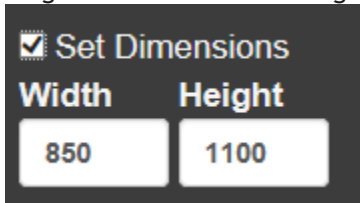
☐ **Linked Report**
A link that opens the first 20 pages in another tab.

☐ **Advanced View**
Display one page at a time, but not limited to the first 20 pages.

☐ **Set Dimensions**

Cancel **Save**

3. Select the module and the Report that you wish to have displayed
4. Acquire the filter, if desired
5. Choose Linked Report if:
 - You wish to have the report only show up as a hyperlink. Then, when the report name is selected, it will open a new web window and show the results of the report in that window.
 - Leave this checked off if you wish for the report to display immediately in the frame. This may mean that the frame takes more time to refresh as it has to run the report each time the frame is refreshed.
6. OR choose Basic View verses Advanced View. (Took the place of PDF versus HTML report)
7. Set Dimensions: This is used if you want to only allow the published report in the frame to be in a size smaller than the frame. This may be helpful when publishing a landscape report into a non-spanned frame or other time when the frame size may limit a standard size Crystal report. When selected the Width and Height fields appear. Simply change the width and height to the desired settings.



Notes: _____

RSS FEED

RSS Feed plug-ins display RSS feeds from other web sites in the Frame, such as those that provide weather or news reports. Users can add multiple RSS feeds to a single frame. RSS is a family of web-feed formats used to publish frequently updated content, such as news stories, blog entries, and podcasts, in a standardized manner. An RSS document, called a feed, contains either a summary of content from an associated web site or the full text.

1. Add Frame named “RSS Feed”
2. Add a new Plugin to create new RSS Plugins
3. Type in the name of the RSS feed into the URL edit box (the example shown is from National Public Radio: <http://www.npr.org/rss/rss.php?id=1001>)

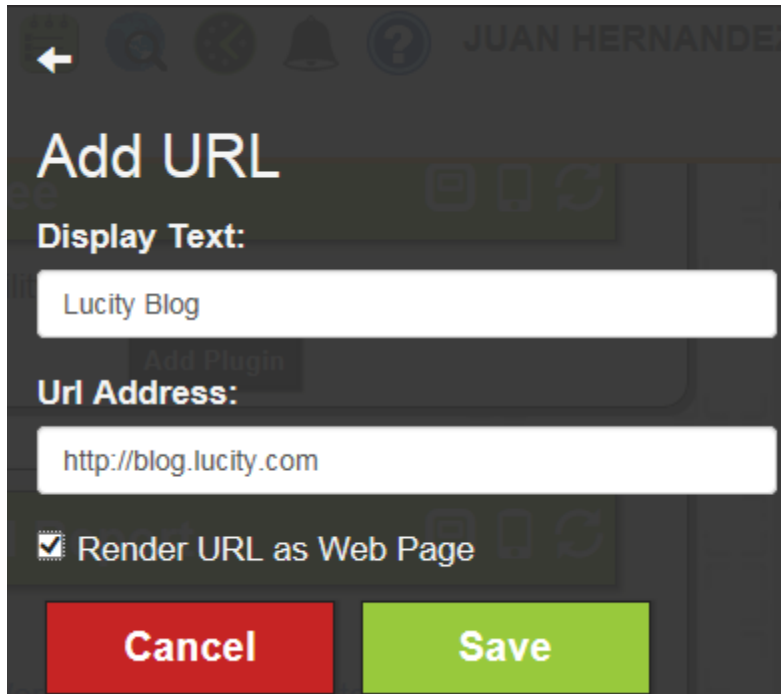
4. Maximum - Maximum controls the maximum amount of items displayed by a feed. Some Feeds offer many items, which could clutter the dashboard.
5. Display Title - Each item of a feed has a title and a description. If this is checked on, then the title of the item will be displayed in the frame.
6. Link Title - Check this on if you want the user to be able to click on the title to launch the web to open up more information about that specific item.
7. Display Description - This should be checked on if you wish the user to be able to see a short summary of the item.

URL Plug-in

URL plug-ins display a link to a web address on the dashboard. This can be used to add a link to the dashboard, or to embed another website into the frame. This is how you can add SQL Server Reporting Services (SSRS) reports.

Step 1. Add Frame named “URL”

Step 2. Add a new Plugin to create new URL Plugins



- a. Display Text - The text that will appear as a hyperlink to the specified URL.
- b. Url Address - The URL for the web content to link to or display
- c. Render URL as Web Page - Allows the content of the URL page to be displayed in the frame. If this is not checked, then the contents are displayed in another window when the user clicks on the hyperlink.

Notes: _____

Shared Tabs & Shared Tab Groups - Version 15r2/16/16r2

The Template concept that Lucy used through Release 2015 has been streamlined to use only shared tabs and shared groups. A shared tab is a tab that can be shared by one or more users. A shared group is a group of shared tabs that always have the tabs in a particular order. Only those users with “General - Edit” permissions will be able to create and/or modify Shared Tabs and Shared Groups. Once they are created, users can add those Shared Tabs and Groups to their own Dashboard if they have the “Edit Own Record” permission.

This is a much more straightforward approach to the Templates that were used previously.

Shared Tabs

Shared Tabs are Dashboard tabs that are or can be shared among multiple users. These tabs are designed to enable administrators to make changes to a tab and apply those changes to all users who have that tab included on their dashboard.

As an example, let’s create a shared tab that provides quick lookups to Work Orders and Requests.

1. Using the User Pane, click Create New and then select “Shared Tab”

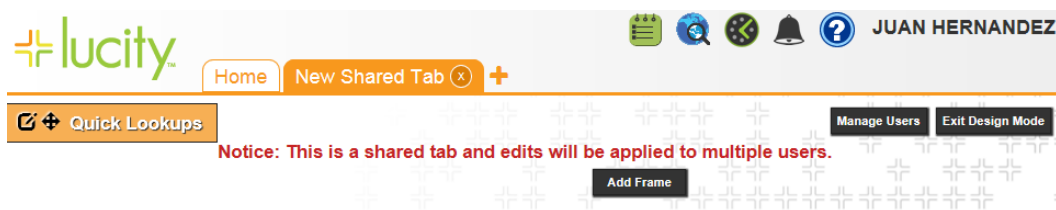


You will notice that this new tab immediately shows up in the Application Tab.

Notes: _____

2. Give it a name that makes sense. Remember that there might be many shared tabs in your future so you will want to know fairly easily what is stored in the tab. Also remember that this is the tab name that everyone who is assigned the tab will see as a new Dashboard tab. Let's call this tab "Quick Lookups"

After hitting OK you see this:



3. Assign it to users.

- Select the Manage Users button

Manage Users

Notes: _____

- The “Manage Users for:” dialog opens and shows no users currently assigned.

Manage Users for: Quick Lookups

☒ Users Currently Assigned ☐ Users Not Currently Assigned

Users currently assigned

Name	Initials	Department
No Records found.		

- Select the button for Users Not Currently Assigned to show a list of all users.

Manage Users for: Quick Lookups

☐ Users Currently Assigned ☒ Users Not Currently Assigned

Users Not currently assigned

Name	Initials	Department
<input type="checkbox"/> a, aa	a	
<input type="checkbox"/> Baisden, Assunta	abaisden	Fleet
<input type="checkbox"/> Carroway, Amado	acarroway	Parks Maintenance
<input type="checkbox"/> Culligan, Alonso	aculligan	Water Plant
<input type="checkbox"/> Davis, Adam	adavis	
<input type="checkbox"/> Lorenzen2, Aaron	ADL	
<input type="checkbox"/> Forristal, Alex	aforristal	Streets
<input type="checkbox"/> Fowles, Andrea	afowles	
<input type="checkbox"/> Fox, Allison	afox	Compliance
<input type="checkbox"/> Freeman, Aaron	afreeman	Water Plant
<input type="checkbox"/> Givhan, April	agivhan	Pavement Markings
<input type="checkbox"/> Hagood, Abraham	ahagood	Street Lights
<input type="checkbox"/> Harton, Alex	aharton	Operations
<input type="checkbox"/> Knapp, Ashley	aknapp	Pavement Markings
<input type="checkbox"/> Knight, Austin	aknight	Streets

- Select the staff that you wish to have this Shared Tab by checking the box next to their name. When you have selected all the users you wish to assign to this tab, click on the Assign Selected Users button in the lower right corner.

1 of 6

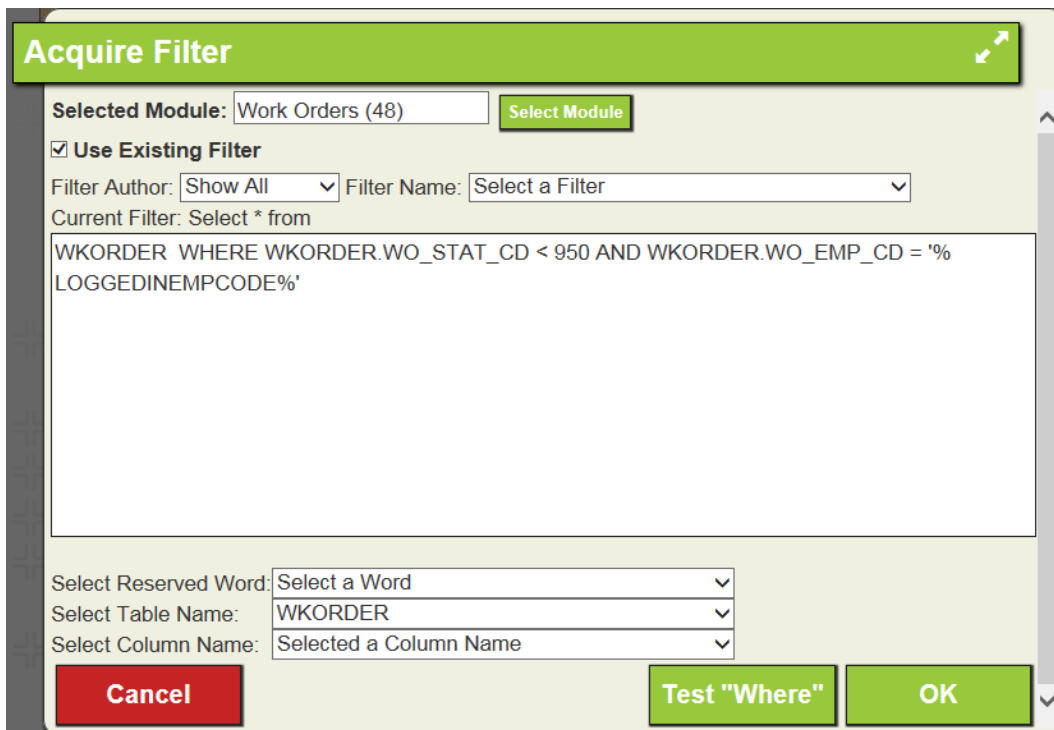
View selected Users Assign selected users

As soon as you Assign the Shared Tab to one or more users, then the users should be able to view these tabs once they refresh their dashboards. They automatically set the new dashboard tab at the end of their current list.

Shared Tabs with Reserved Words

These Shared Tabs can be very beneficial when the Filter Reserve Lists are used. As an example, a drill down can be quickly created to show all open work orders for the logged in person.

1. Create a new Shared Tab
 - Go into Design Mode
 - Select Add Tab
 - Select Create a New Tab
 - Name the Tab - Open WOs Lead Worker, check the “Is Shared” box
2. Add Frame into the Open WOs tab
 - Select Add Frame
 - Select Create a New Frame
 - Name the new frame “Open WOs”
3. Add drilldown to Open WOs frame
 - Select Add Plugin button
 - Select Create a New Plugin
 - Select Data Drill
 - Name the new Data Drill “Open WOs”
 - Create Filter to find Open WOs (WO_STAT_CD < 950) and where the Employee Code (WO_EMP_CD) matches the employee code of the logged in user.



Acquire Filter

Selected Module: Work Orders (48) Select Module

☒ Use Existing Filter

Filter Author: Show All Filter Name: Select a Filter

Current Filter: Select * from

WKORDER WHERE WKORDER.WO_STAT_CD < 950 AND WKORDER.WO_EMP_CD = '% LOGGEDINEMPCODE%'

Select Reserved Word: Select a Word

Select Table Name: WKORDER

Select Column Name: Selected a Column Name

Cancel Test "Where" OK

This filter can easily be changed to use Supervisor instead (WO_SUPR_CD).

- Add drill downs that make sense to you
- Select a Custom View

Lucity will automatically convert Dashboard tabs from a version earlier (Release 2015 and previously) to the format that it needs for Version 15r2/16/16r2 and beyond.

Notes: _____

Shared Groups

Shared Groups are a set of shared dashboard tabs that are displayed in a specific order. We have had several system administrators ask us to include this. Each Shared Group has a specific name and each user is allowed to have one Shared Group associated to their dashboard.

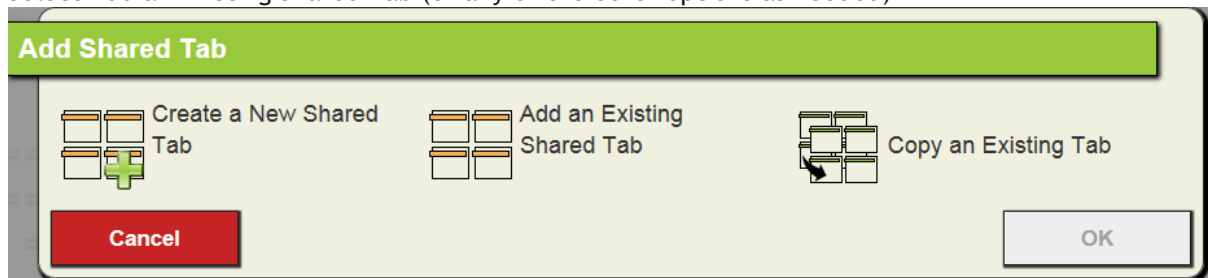
For example, you might want all of your lead workers to have the Open WOs dashboard tab and the Quick Link tab in that order. To provide this you link the two tabs together as follows:

1. Create New Shared Group

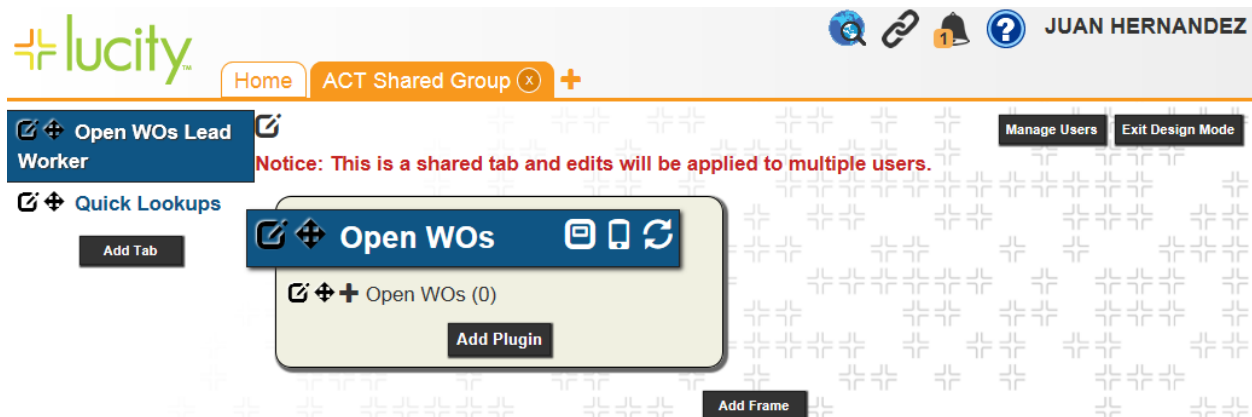
- From the User Pane, select Create New and then select Shared Tab Group.
- Give the Group a name: ACT Shared Group
You will notice that the new group appears as an Application Tab, just like a user would.

2. Add the Shared Tabs to this Group

- Select Add Tab
- Select Add an Existing Shared Tab (or any of the other options as needed)



- Add Open WOs Lead Worker
- Add Quick Lookup
- Make sure that they are listed in the order that you want them



3. The “Manage Users for:” dialog opens and shows no users currently assigned.

Manage Users for: ACT Shared Group

☒ Users Currently Assigned ☐ Users Not Currently Assigned

Users currently assigned

Name	Initials	Department
No Records found.		

4. Select the button for Users Not Currently Assigned to show a list of all users.

Manage Users for: Quick Lookups

☐ Users Currently Assigned ☒ Users Not Currently Assigned

Users **Not** currently assigned

Name	Initials	Department
<input type="checkbox"/> a, aa	a	
<input type="checkbox"/> Baisden, Assunta	abaisden	Fleet
<input type="checkbox"/> Carroway, Amado	acarroway	Parks Maintenance
<input type="checkbox"/> Culligan, Alonso	aculligan	Water Plant
<input type="checkbox"/> Davis, Adam	adavis	
<input type="checkbox"/> Lorenzen2, Aaron	ADL	
<input type="checkbox"/> Forristal, Alex	aforristal	Streets
<input type="checkbox"/> Fowles, Andrea	afowles	
<input type="checkbox"/> Fox, Allison	afox	Compliance
<input type="checkbox"/> Freeman, Aaron	afreeman	Water Plant
<input type="checkbox"/> Givhan, April	agivhan	Pavement Markings
<input type="checkbox"/> Hagood, Abraham	ahagood	Street Lights
<input type="checkbox"/> Harton, Alex	aharton	Operations
<input type="checkbox"/> Knapp, Ashley	aknapp	Pavement Markings
<input type="checkbox"/> Knight, Austin	aknight	Streets

5. Select the staff that you wish to have this Shared Tab by checking the box next to their name. When you have selected all the users you wish to assign to this tab, click on the Assign Selected Users button in the lower right corner.

1 of 6

View selected Users **Assign selected users**

6. Exit Design Mode

If the user already has tabs or shared tabs assigned, then the Grouped Tabs will be located at the bottom of the list.

Web Applications – End User Training

In this section, we'll introduce you to the Lucy Web application. The Web system allows you to create custom forms to be used online. You'll use these forms to view, add, edit, and delete *Work Orders* and *Requests* as well as asset and inventory data. You will need to know what the web application is capable prior to meeting with management and determining what you want each user, or group of user, to view and manipulate.

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Views, Grids, and Forms

The Lucity Web forms are made up of three main components: Views, Grids, and Forms. To help you understand how web forms are used, we've described these components below.

- **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).
- **Grids** are individual components within the Views. They allow you to create parent and child grids. Each grid can then have a Detail form associated with it. For example, there may be parent Request grids that contain child grids such as Requestors, Comments, or Tracking information. There may also be parent Work Order grids that contain child Resources, Tasks, and Tracking information. Other inventory forms can be arranged in a similar manner.
- **Forms** are used for adding new records, editing existing records, or viewing details about a single object. Data in forms is not displayed in a Grid. Forms are launched in a separate browser window. These forms may be tied to a Grid, or used alone as Request Submittal forms.

The screenshot displays the Lucity web application interface. At the top, there is a navigation bar with links: Home, Menu, Favorites, Open Views, and Modules. Below this, a breadcrumb trail shows 'Equipment Inventory x' and 'Equipment Inventory x'. The main content area is titled 'Equipment Inventory' and features a grid of equipment records. The grid has columns for Equipment ID, Equipment ID Text, Equipment Type Text, Manufacturer Text, Model, Serial Number, Year, Department Text, Group Text, and Action. A record with ID 'BKMO01' is selected, and a detailed form is displayed below the grid. The form is titled 'Equipment Readings' and contains fields for Date, Employee Text, Purpose Text, Current Hourmeter, Hourmeter Rate, Equipment ID, Equipment ID Text, Last Modified By, and Last Modified Date. The form also includes a 'Readings' section with fields for Reading Date, Reading Rate, and Reading Difference. A 'Custom' section at the bottom of the form allows for user selection and modification of the record. The grid is labeled 'Grid' and the form is labeled 'Form'. A 'Record' label points to a specific row in the grid.

Equipment ID	Equipment ID Text	Equipment Type Text	Manufacturer Text	Model	Serial Number	Year	Department Text	Group Text	Action
AC	AC								
AD	AD								
BKMO01	BANKLICK P/S #1 MOTOR	Pump Motor	Banklick	245743152			Wastewater Quality		

Equipment Readings

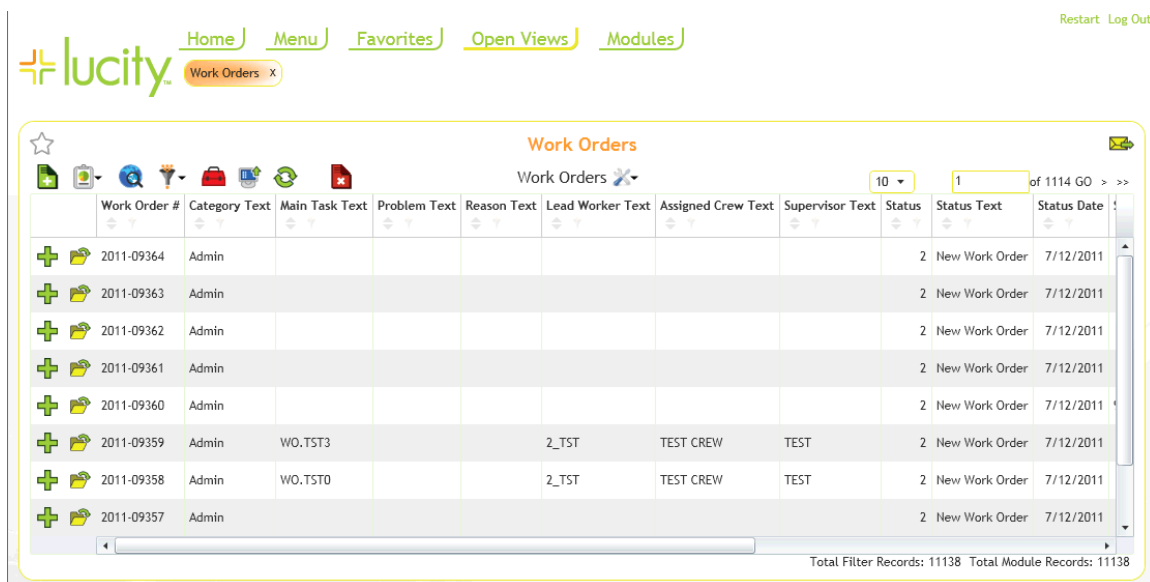
Date	Employee Text	Purpose Text	Current Hourmeter	Hourmeter Rate	Equipment ID	Equipment ID Text	Last Modified By	Last Modified Date
2/2/2011	Richard Bennett		1.00		BKMO01	BANKLICK P/S #1 MOTOR	Rob	2/4/2011

Using Custom Forms and Grids

Almost everything in the web interface is customizable. This allows administrators to setup anything from a generalized web experience that everybody can use or a specialized web experience for each group or user. 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.

Sample Work Order View

Below, we've provided an example of an online Work Order View in Grid format. As you can see, this particular View displays 10 Work Order records. 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.



Work Order #	Category Text	Main Task Text	Problem Text	Reason Text	Lead Worker Text	Assigned Crew Text	Supervisor Text	Status	Status Text	Status Date
2011-09364	Admin							2	New Work Order	7/12/2011
2011-09363	Admin							2	New Work Order	7/12/2011
2011-09362	Admin							2	New Work Order	7/12/2011
2011-09361	Admin							2	New Work Order	7/12/2011
2011-09360	Admin							2	New Work Order	7/12/2011
2011-09359	Admin	WO.TST3			2_TST	TEST CREW	TEST	2	New Work Order	7/12/2011
2011-09358	Admin	WO.TST0			2_TST	TEST CREW	TEST	2	New Work Order	7/12/2011
2011-09357	Admin							2	New Work Order	7/12/2011

Notes: _____

Using the View

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

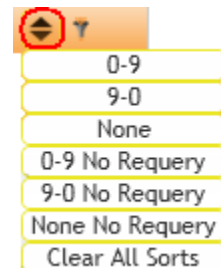
In the example below, the main Work Order grid contains seven child grids: Location, Assets, Checklist, Events, Task, Tracking, and Comments. The number of child records in each grid appears beside the name.

The screenshot shows the Lucity Work Orders interface. At the top, there are navigation links: Home, Menu, Favorites, Open Views, and Modules. Below these is a 'Work Orders' tab. The main area displays a grid of work orders. The first row is highlighted, and a child grid is expanded below it. The child grid shows seven categories: Locations (0), Assets (0), Checklist (0), Events (0), Tasks (1), Tracking (1), Comments (0), Requests (0), and Work Orders (0). The main grid has columns for Work Order #, Category Text, Main Task Text, Problem Text, Reason Text, Lead Worker Text, Assigned Crew Text, Supervisor Text, Status, Status Text, and Status Date. The status of all work orders is 'New Work Order'.

Work Order #	Category Text	Main Task Text	Problem Text	Reason Text	Lead Worker Text	Assigned Crew Text	Supervisor Text	Status	Status Text	Status Date
2011-09362	Admin							2	New Work Order	7/12/2011
2011-09361	Admin							2	New Work Order	7/12/2011
Locations (0) Assets (0) Checklist (0) Events (0) Tasks (1) Tracking (1) Comments (0) Requests (0) Work Orders (0)										
2011-09360	Admin							2	New Work Order	7/12/2011
2011-09359	Admin	WO.TST3			2_TST	TEST CREW	TEST	2	New Work Order	7/12/2011
2011-09358	Admin	WO.TST0			2_TST	TEST CREW	TEST	2	New Work Order	7/12/2011
2011-09357	Admin							2	New Work Order	7/12/2011
2011-09356	Sewer Pipe							2	New Work Order	7/12/2011

Total Filter Records: 11138 Total Module Records: 11138

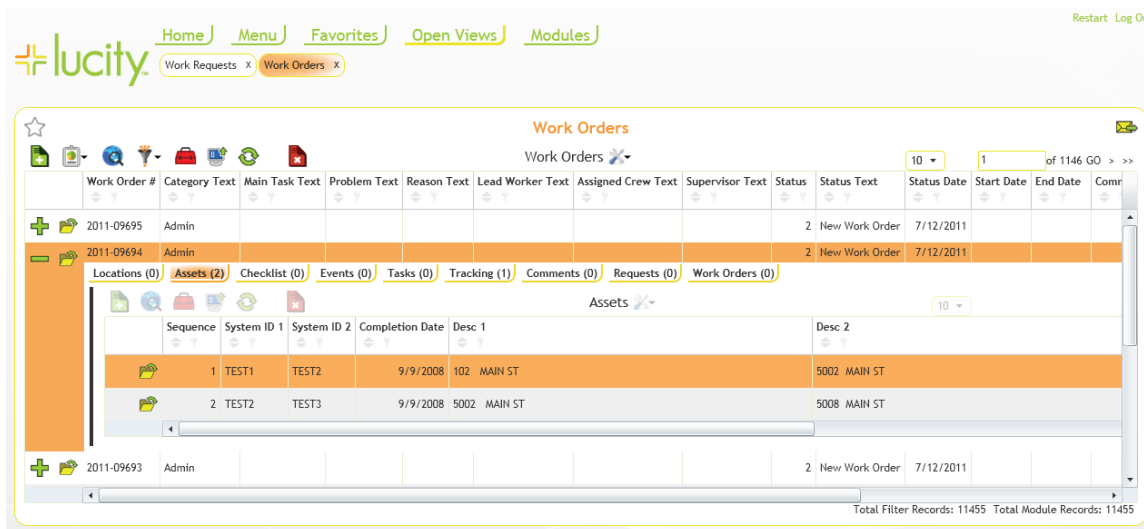
You can sort information in the View by clicking on a column heading, or clicking the drop-down arrow beside the Column Filter buttons. There you'll see options to sort by ascending or descending order. The System will support multiple column sorts at a time. You can also stretch column widths to see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




Notes: _____


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. WO Location, Assets, etc.) to access the available child grids. In the example below, the Work Order Task child grid contains two child records. These child records each display an individual Task 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.

Using the Forms

Each child grid can contain multiple Forms. Forms are used for adding new records, as well as viewing and editing existing records. By clicking on a listing in the child 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 will have different fields available. Changes made to the values in the fields on these forms will also be reflected in your desktop application 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, and Ctrl + Enter for carriage returns in multi-line text boxes (such as Comment fields).

Notes: _____

















Several fields on the Detail Forms allow you to use the F5 key to copy a value from one field to another. 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 Start Date to the End Date.

Using the Toolbar Buttons


The Web toolbar 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. 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.
	Create Work Order	Generates a work order for the highlighted or filtered Request, Inventory, or Inspection records. This can create a work order for all records or one 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.
	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 (no child grids) into a csv file which is then emailed to them.
	Delete	Deletes all selected records.
	Toolkit	Opens the Toolkit dialog. Toolkit functions vary by form. i.e. Populate Completion Dates, Create Work Order with Selected Assets, etc. In the web there are no right-mouse click tools like in the desktop. All of these tools have been moved to this Toolkit for the appropriate grid.
	Attach an Existing Record	Attaches an existing inventory record to the selected inventory 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.
	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,
	Editable Grids	<p>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.</p> <p>Work Order Toolbar – Click it here to open the resources related to the first task in the Task list.</p> <p>Work Order > Tasks Toolbar – Click it here to open the resources for the task currently selected in the task list.</p>

***Note:** When you create a new work order or request the system will open the corresponding default view in a new tab if one exists. If a default view 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 above the grid indicating that the operation succeeded.*

Editable Grids

The editable grid is only for Work Order Task, 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 and click the  button. The editable grid page will open. There will be a grid for each type of work order resource that was available for that task.



2014-14537 - Repair (-)

15 valid Employees exist for this category.

Resource	Resource Text	Alt Description	Department Text	Class	Group Number	Unit of Measure Text	Default Unit Cost	Units	Time Cost Text	Unit Cost	Total Cost
----------	---------------	-----------------	-----------------	-------	--------------	----------------------	-------------------	-------	----------------	-----------	------------

114 valid Materials exist for this category.

Resource	Resource Text	Processed by Financials	UPC Code	Alt Description	Department Text	Class	Group Number	Unit of Measure Text	Default Unit Cost	Res Account #	Res Proj No
13411	Pipe, DI, 21"	<input type="checkbox"/>			Waste Water Collection			Foot	28.000	..5332	
		<input type="checkbox"/>							0.000		
		<input type="checkbox"/>							0.000		

11 valid Fluids exist for this category.




Resource	Resource Text	UPC Code	Alt Description	Department Text	Class	Group Number	Unit of Measure Text	Default Unit Cost	Res Account #	Res Proj No - Acct	Units	Unit Cost	Total Cost
----------	---------------	----------	-----------------	-----------------	-------	--------------	----------------------	-------------------	---------------	--------------------	-------	-----------	------------

23 valid Equipment exist for this category.


Equipment	Equipment Text	Alt Description	Start Date	End Date	UOM	Units	Unit Cost	Total Cost	Group Number
-----------	----------------	-----------------	------------	----------	-----	-------	-----------	------------	--------------

0 valid Contractors exist for this category.

Resource	Resource Text	Alt Description	Department Text	Class	Group Number	Unit of Measure Text	Default Unit Cost	Res Account #	Res Proj No - Acct	Units	Unit Cost	Total Cost	Units - Grand Total
----------	---------------	-----------------	-----------------	-------	--------------	----------------------	-------------------	---------------	--------------------	-------	-----------	------------	---------------------


- To add a resource find the grid it should go in and click the add record  button.
- To edit a resource click in the field to edit and make changes.
- You can use the arrow keys or Tab key to move through the fields in the grid.
- To delete a resource select it in the grid and click the delete record  button.
- After making changes click the save button  to save edits and close the grid. Choosing the cancel button will close the grid and

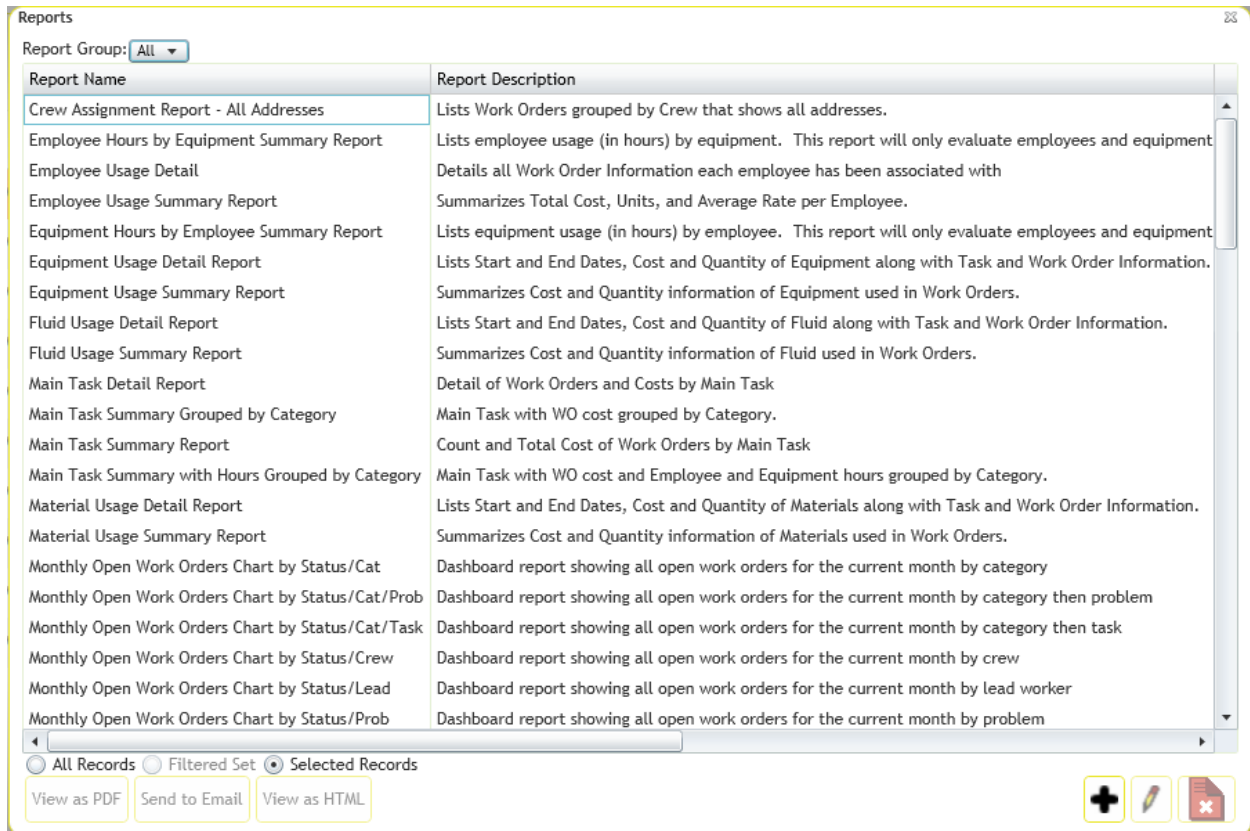
Several changes have been made to how this edit functions for 14r2/15 (and 2014 SP1). Now, when selecting Resources, the user can type into this field directly without having to use the mouse. It uses a "contains" filter and shows only the first 20 records for the filter. The user can begin typing either the resource code or text to get the selected records. The user can also now press the enter button. Notice how in the header of each resource type the system shows how many records exist within the category.

The tool defaults to the first Work Order Task. If the work order has more than one task, then for every task but the first task, the user will need to open the task grid, highlight the task on which to enter/edit resource data and then hit the  button to make the necessary changes.

Reports

This web-tool also works in a different manner than the Desktop Reports tool. Follow the steps below to use this toolbar button:

1. Click the Reports button  to open the Reports dialog. The following window will be displayed:



- 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.
 - For Version 14r2/15 a Report Group was added. By selecting a group from the dropdown, the users will see fewer reports to make selecting the appropriate report quicker. It will always default to All. Report Groups are defined in the Lucity Admin program in the Reports dialog.
 - 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 for 14r2/15. This value can be increased by changing a setting in an .ini file (check with the Lucity Support team regarding this change). For 15r2/16/16r2, this value can be modified in the Web Performance tab of the System Settings option in the Lucity Admin program.
4. To add a new report for 14r2/15, click *Add*. (for 2015+ please attend the ACT Session Crystal Reports and the Web). 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 beside 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.

Column Filter

This web-tool works in a different manner than the desktop Filter tool. To use the Column Filter tool on the Lucy Web site, follow the steps below:

1. Column Filter buttons are found at the top of each column on the Grid and are present only if there is more than one full page of records. A sample appears below:


Work Order #	Category Text	Main Task Text	Problem Text	Reason Text	Lead Worker Text	Assigned Crew Text	S
201	No filter currently set						
201	Clear Clear All Filters Apply						

2. Determine which column you would like to use to search for data. The system supports multiple column filters at a time. In the example above, you can choose to sort by ascending, descending, etc.
3. Click on the appropriate column's Filter button. A dialog will appear:


No filter currently set

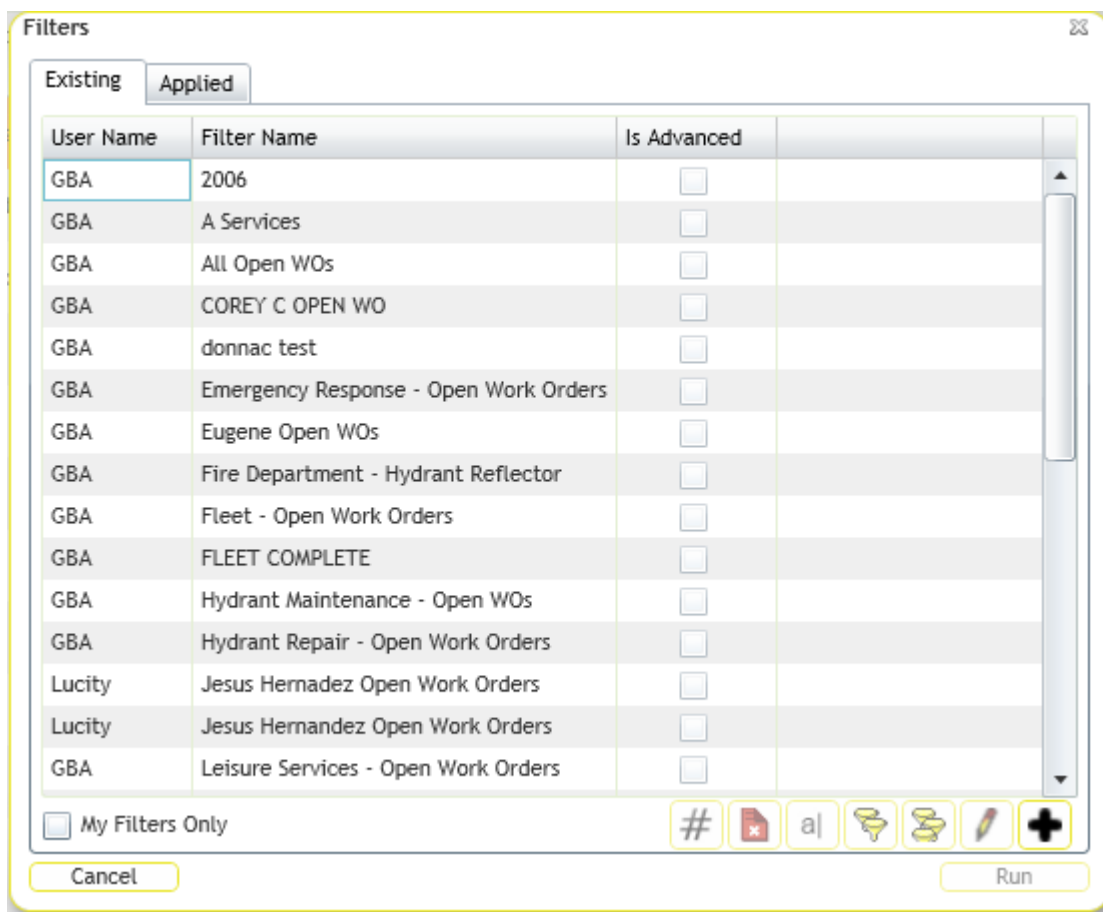
Clear Clear All Filters Apply


4. Choose the way in which you would like to search for data. The first drop-down list will contain some 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
 - Equal
 - Not Equal
 - Is Empty
 - Is Not Empty
5. 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.
 - Using the example above, you could set a column filter on Category Text Starting With "C" and Main Task Starting With "RE". This would return only those records that meet both criteria.





- After you have defined column filter criteria for a column, the column filter icon will be highlighted .
- To remove column filter criteria, click on the column filter icon and select *Clear Current*.

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.



- The "My Filters Only" box is not marked by default. This means that all filters created will be shown as default. If you wish to only see filters created by the logged in user then select My Filters Only (which will be the same list of filters shown in the Quick Filter box).
- To use an existing filter, highlight a filter name and click *Run Filter*. The filtered record set will be loaded onto the web page.
- 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. To 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 copy the filter to multiple users, highlight a filter and click the *Copy the Filter to Multiple Users* button . A dialog will appear allowing you to select one or more selected users.

Copy All Open WOs to selected users

Search:

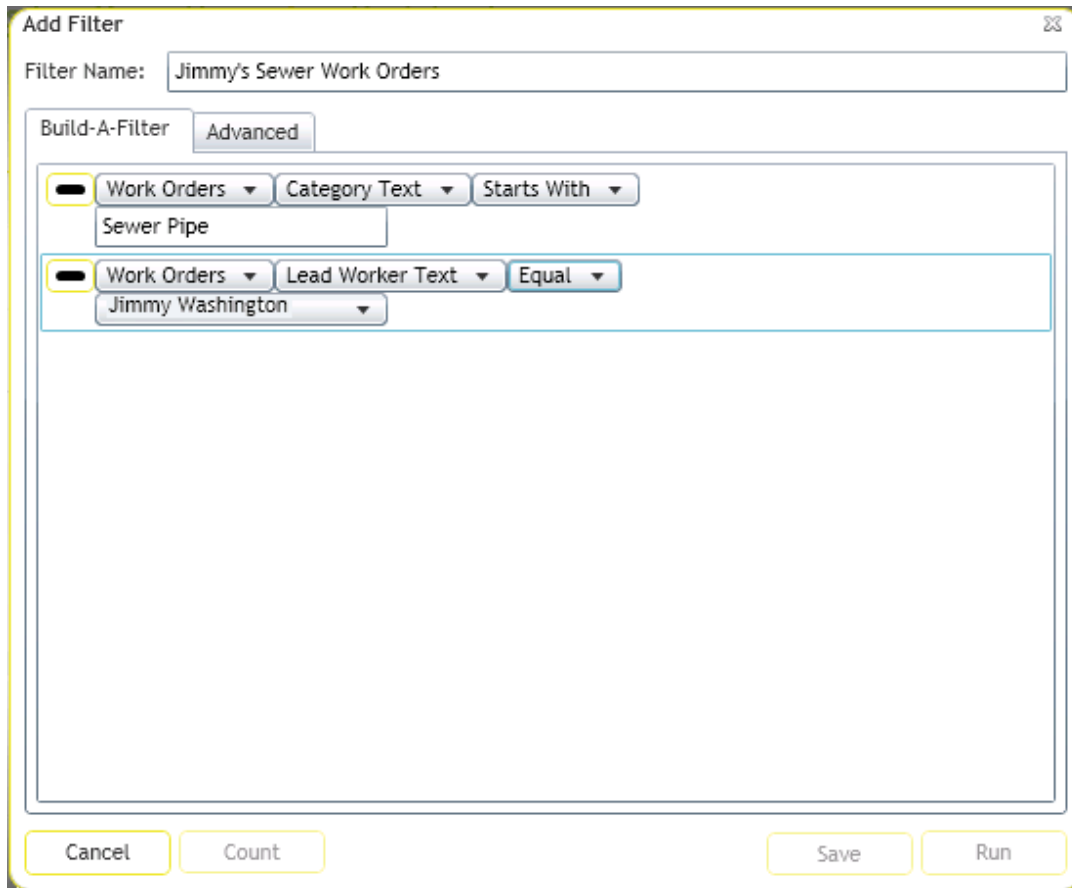
- Pinkston, Don (Don Pinkston)
- Rollon, Jen (Jen Rollon)
- Hernandez, Jesus (Jesus Hernandez)
- Washington, Jimmy (Jimmy Washington)
- Lucity Inc. (Lucity)
- Roland, Nick (Nick Roland)
- (PublicWebUser)
- (RESTAPILogon)
- (ScheduledTasksUser)

User initials will be appended to the end of the filter name

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

Notes: _____

9. To add a filter, click the add button .



Add Filter

Filter Name: Jimmy's Sewer Work Orders

Build-A-Filter Advanced

☐ Work Orders Category Text Starts With
Sewer Pipe

☐ Work Orders Lead Worker Text Equal
Jimmy Washington

Cancel Count Save Run

- Use the initial 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 first list, a second 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
- 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 added 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: Problem Contains “xyz”, Problem Contains “abc”. The resulting filterset will include all Problems that contain either “xyz” or “abc”.
 - You should not use a filter statement like the following: Problem Does Not Contain “xyz”, Problem Does Not Contain “abc”. The resulting filterset will contain all problems (all Problems that do not have “xyz” or all Problems that do not have “abc”).
 - To remove a filter field, click the big minus button.
1. 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.
 2. 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.

Add Filter

Filter Name:

Build-A-Filter | Advanced

Select * from

```
WKORDER WHERE WKORDER.WO_CAT_TY LIKE 'Sewer Pipe%' AND WKORDER.WO_EMP_TY = 'Jimmy Washington'
```

Select Reserved Word ▼

Cancel Count Save Run

- Use the window provided to enter or modify the SQL Statement.
 - Click the *Count* button to check the filter string and determine how many records will be returned.
3. Click *Run* when you have finished building your filter. The new filtered dataset will appear.

Toolkit

Some Views and Forms will contain Toolkits. These Toolkits provide you with special functions designed specifically for each type of form. For Work Orders since we have so many tools, we now group the Tools by General, Request and Change Related.



- Change Crew for Filterset
- Change Lead Worker for Filterset
- Change Supervisor for Filterset
- Change Work Order Status for Filterset
- Close Work Order for Filterset
- Create Work Order and associate to it
- Create Work Order from Template
- Locate Work Order from an Address
- Locate Work Order from an Asset

1. To access the Toolkit, highlight one or multiple records in the grid and click the dropdown arrow beside the Toolkit icon. Select the tool you'd like to execute and the Toolkit dialog will appear.
 - Different Toolkit options will be displayed based on the type of records highlighted.
 - When the Toolkit dialog is displayed, it will contain different editable fields based on the selected tool.
 - Some Toolkit operations are performed automatically; they require no other input from the user. When these functions are complete, a notation will appear in red text above the General Form indicating "Operation Succeeded".
3. A sample Toolkit option is displayed below; however, many more functions are offered that vary by form. At this time, the Toolkits are not customizable.
 - The example below comes from the Work Order Tasks Detail Form. Here, we've selected the tool to Populate Completion Date. Users can then enter the completion Date.

Populate Completion Date

Complete Date: <M/d/yyyy> 15

Cancel OK

4. For Toolkit functions requiring user input, click *OK* when complete. The data entered will be applied to all highlighted records.

Property Viewer Button

The Property Viewer Button is really a tool that allows users to view all of the most recent information about an address at a glance.


The Property Viewer provides a list of records from many Lucy modules that are related to the current asset based on the address.

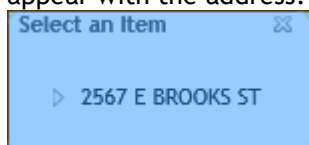
Notes

- 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. The tool also shows up as a tool in the Locations grid of a work order allowing the client to select any address on the work order.

How to View Related Records


1. Click the Property Viewer button .
2. The tool will take the address entered on the current module and the following pop-up will appear with the address.



3. 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.
4. A list of the related records will appear.
5. Click on a record to open that module




Launch Desktop Records

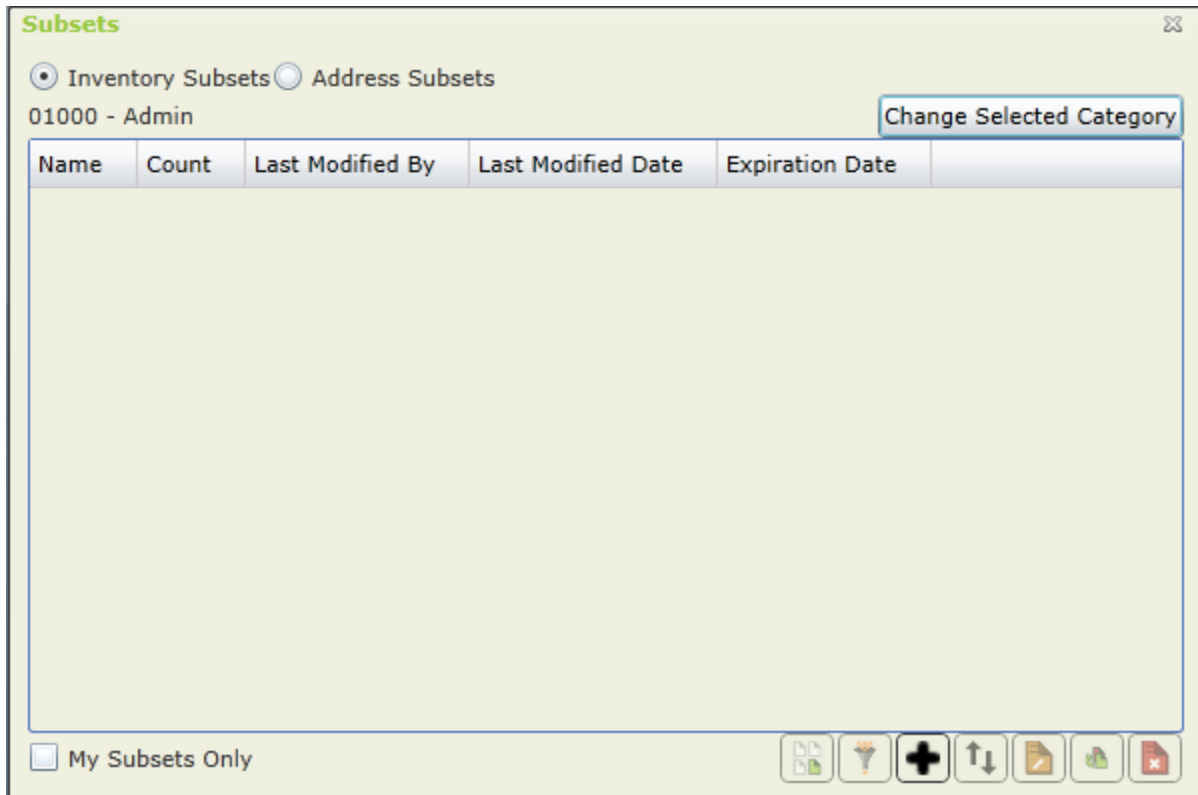
An additional feature in the web application allows you to highlight one or more rows in the grid and then click the *View Selected Record(s) in Desktop*  button to open those records in the Desktop application. This allows you to quickly access records from the web interface.

Subsets

This tool allows users to either create or load subsets. Let's first tackle creating a new subset.

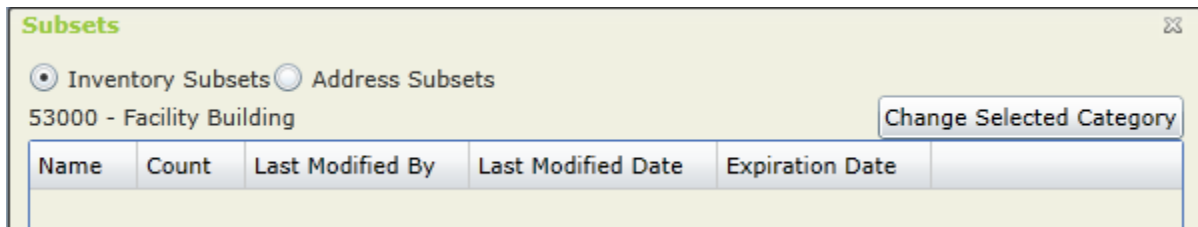
First, highlight the records for which you want to create the subset. This is very easy in an asset module (like Sewer Structures or Water Hydrants) because they are all the same type of asset. In work orders, it is important that you highlight similar types of assets. It works by highlighting one or more

records in the displayed grid. To use this tool, select the subset button . The following window will appear: (this example is for work orders which is the most complicated)




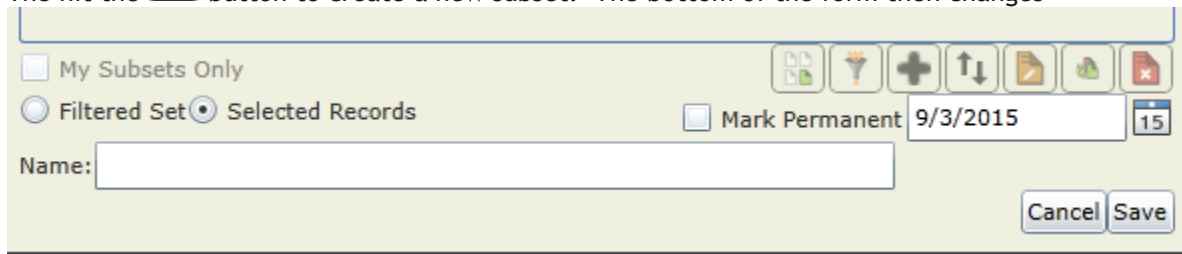
The screenshot shows a window titled "Subsets" with a close button in the top right. It has two radio buttons: "Inventory Subsets" (selected) and "Address Subsets". Below them is the text "01000 - Admin" and a button "Change Selected Category". A table with the following headers is displayed: "Name", "Count", "Last Modified By", "Last Modified Date", and "Expiration Date". The table body is empty. At the bottom left is a checkbox "My Subsets Only". At the bottom right is a toolbar with icons for: a subset button, a funnel, a plus sign, a double-headed arrow, a document, a green checkmark, and a red X.

Next you will want to change the Selected Category and change the category to the category of the highlighted records.



The screenshot shows the same "Subsets" window, but now the text below the radio buttons is "53000 - Facility Building". The "Change Selected Category" button is still present. The table structure is the same, but only the header row is visible, and the body is empty.

The hit the  button to create a new subset. The bottom of the form then changes



You will get to select if you wish to create the Subset on the Filtered Set or only on the Selected Records. You can also mark the subset as permanent or select the date after which it will be deleted from the system. Finally, you need to give it a unique name and then hit Save. Once saved, it will look something like this:

Subsets

☒ Inventory Subsets ☐ Address Subsets


53000 - Facility Building Change Selected Category


Name	Count	Last Modified By	Last Modified Date	Expiration Date	
Don ACT2015	2	Don Pinkston	8/24/2015	9/3/2015	

What this creates is a list of asset IDs for the assets in the selected category that are in the list of work orders that have been selected.

As an example, say you did a filter on water hydrants painted between 1/1/2014 and 12/31/2014. The subset would then return all hydrants listed on one of these work orders (if you selected the Filter set).


Loading Subsets. Loading subsets allows users to open a precreated subset. An example of this would be a client has called in about a water main break. Using GIS the user could select multiple water pipes surrounding this area and then create a subset of these pipes. Then, in Work Orders, the user could Load this Subset. This would then show all of the work orders that have been done historically (or at least within the current record set) on the pipes in the subset.

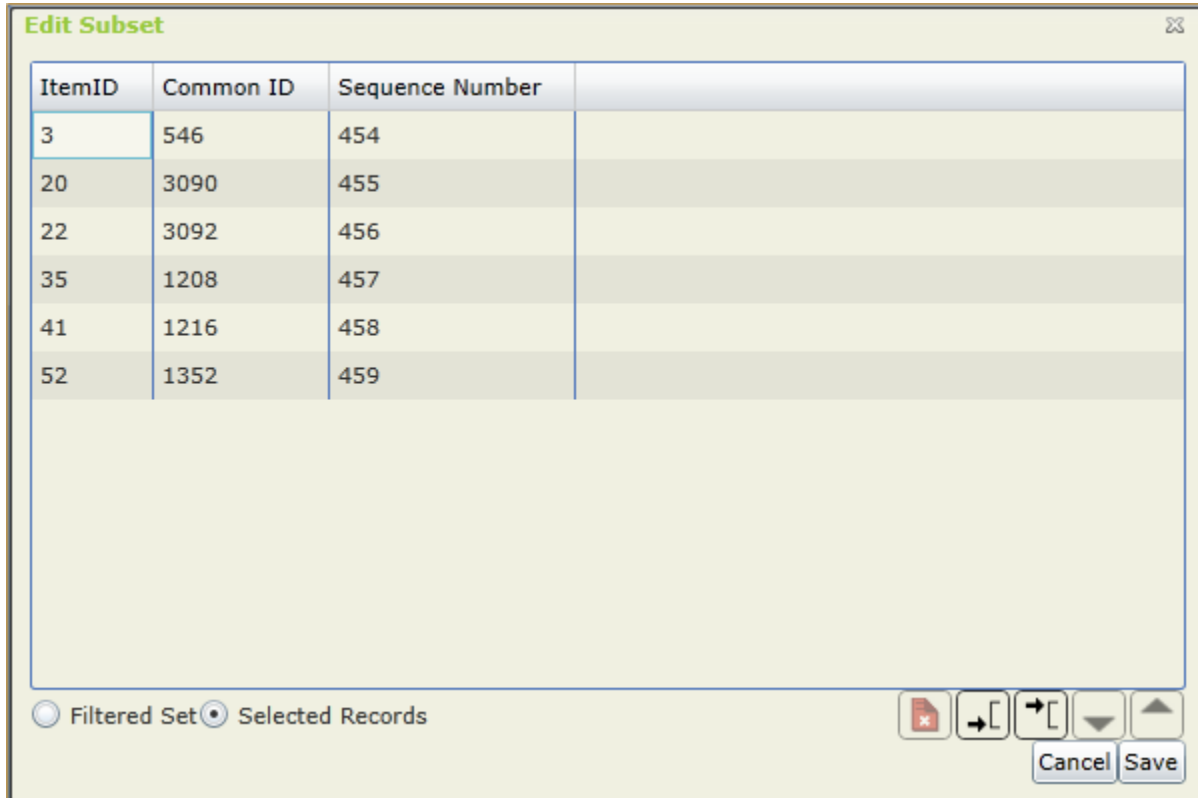
Using the Don ACT2015 example, the user can load the subset using the  button. This should overwrite the Filtered dataset and return all records (in this case in Work Orders) that match the subset.

Another option that a user would have would be to Load the Subset into a Filter using the  button. This would retain the existing filter set and return the records that meet both the subset and the current filtered set of data.

The remaining four buttons on the right-hand side do not work for the parent Work Order (by design). Therefore, let's open up an asset module - Water Hydrants - to show these button's capabilities.








The  button is a Reorder button. Subsets now retain their order when the initial subset is created. This button then allows a user to reorder the assets so that when they are Loaded into another grid (work order asset grid or maybe the Water Flushing Hydrant grid) then the order becomes the sequence order. When selected, the following screen appears:



ItemID	Common ID	Sequence Number
3	546	454
20	3090	455
22	3092	456
35	1208	457
41	1216	458
52	1352	459

☐ Filtered Set ☒ Selected Records

Cancel Save

This shows a list of the items in the subset in sequence order (not necessarily starting at 1). To activate the buttons on the lower right, the user must first click on a row (only one row is allowed to be selected at one time). Once selected, the user has the following options:



- Deletes the selected record



or

- These are the insert below or above the row selected. What it inserts depends. If the Filter Set on the lower left is selected (radio button) then it inserts the entire filter set the row selected. If the Selected Records option is selected, then those records that were selected prior to hitting the subset button will be selected below or above the selected location.




or


- These buttons move down or up the asset for which the user has selected.

Cancel or Save will either cancel any changes or save the changes that were made.




The Edit Button  allows the user to change the subset name, mark the subset as permanent, or assign it a new automatic delete date.




The Replace Button  allows the user to replace the selected subset with either the selected records or the records in the entire filter set. However, the selected records must be selected prior to entering subsets initially.

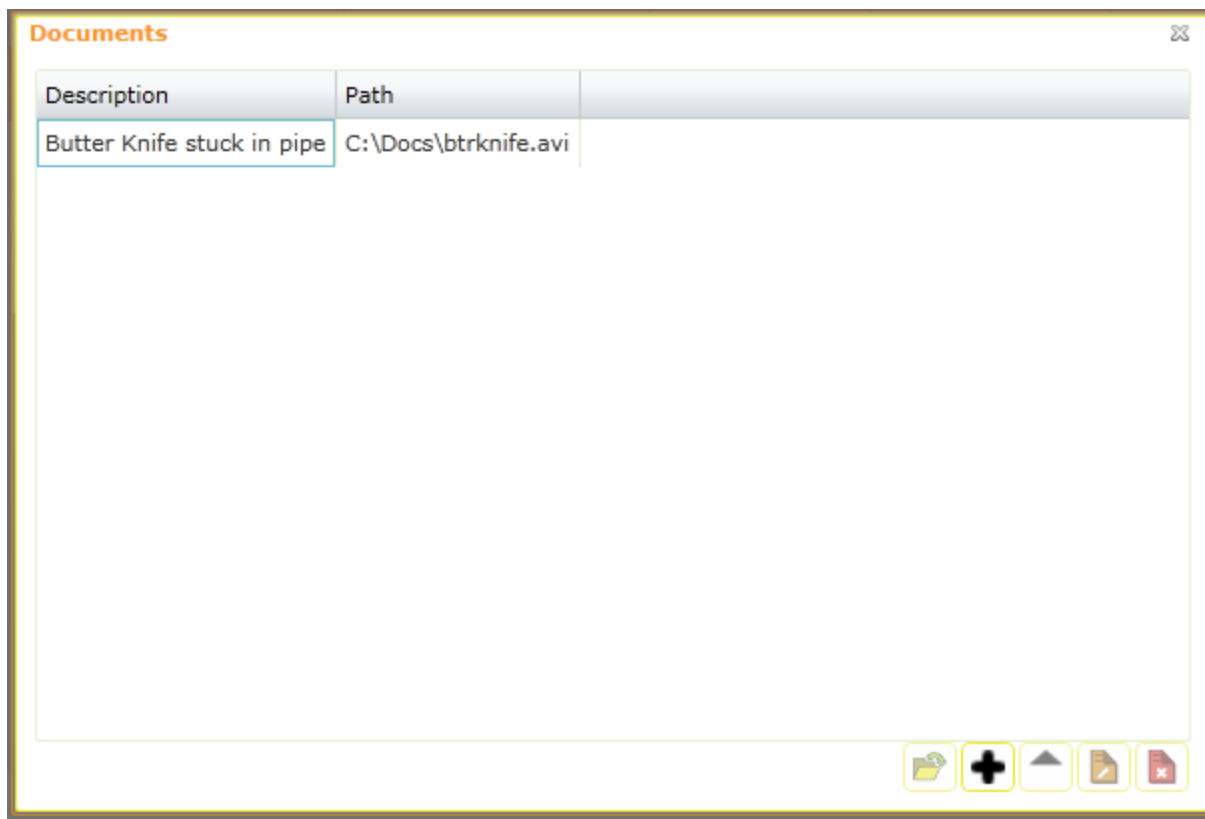



The Delete Button  allows the user to delete the subset manually.


Another new capability in subsets is that in the web a user can create a subset for either the Inventory items or the inventory item addresses (if the inventory has an address). The desktop does not allow for an Address subset except for the Address module or the Request module.

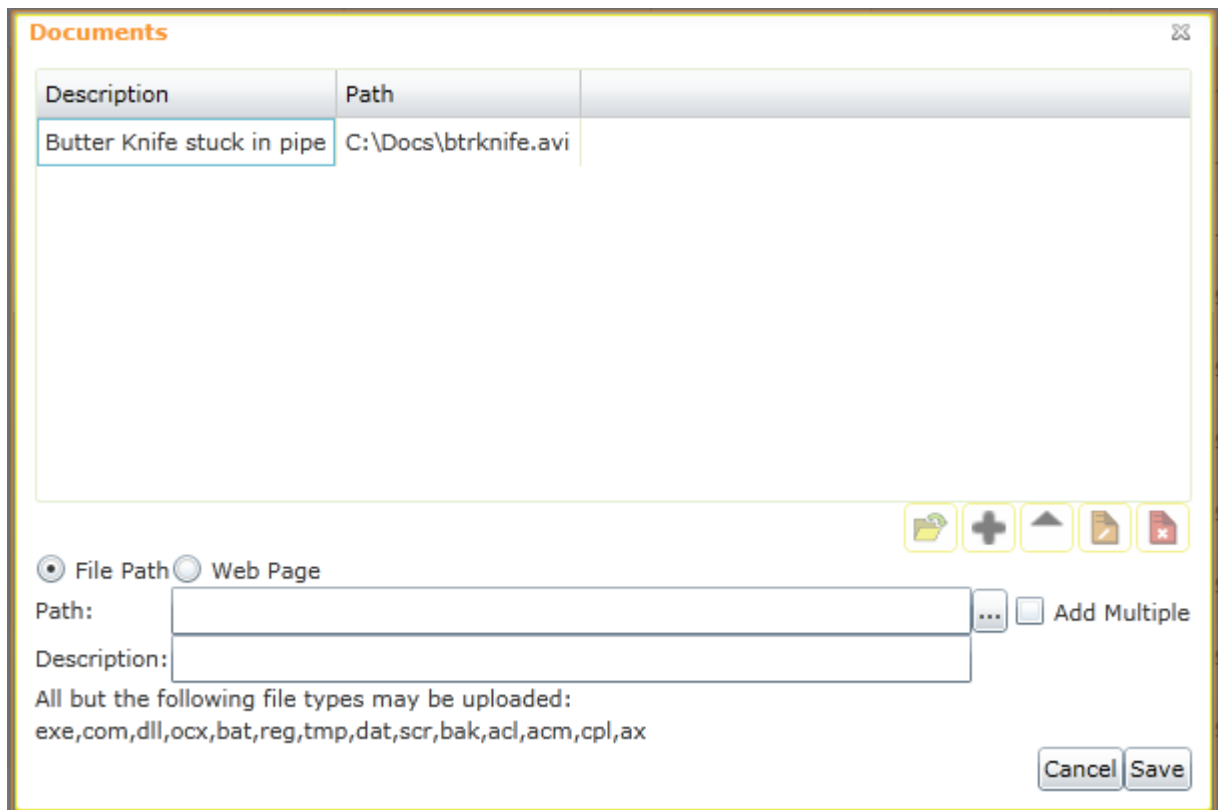
Document Control

This tool allows users to view documents that are attached to an asset and attach new documents. To use this tool, select an asset 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  (or double click the document). The document will be opened by your computers default program for opening that kind of document.

- To add a document click the add button . The following dialog will open:



The dialog box is titled "Documents" and contains a table with two columns: "Description" and "Path". The first row of the table has the text "Butter Knife stuck in pipe" in the Description column and "C:\Docs\btrknife.avi" in the Path column. Below the table, there are two radio buttons: "File Path" (selected) and "Web Page". To the right of these buttons is a toolbar with five icons: a folder, a plus sign, an upward arrow, a document with a pencil, and a document with a red X. Below the radio buttons are two text input fields: "Path:" and "Description:". To the right of the "Path:" field is a button with three dots and a checkbox labeled "Add Multiple". Below the input fields is a text block that reads: "All but the following file types may be uploaded: exe,com,dll,ocx,bat,reg,tmp,dat,scr,bak,acl,acm,cpl,ax". At the bottom right of the dialog are "Cancel" and "Save" buttons.

Description	Path
Butter Knife stuck in pipe	C:\Docs\btrknife.avi





☒ File Path
 ☐ Web Page

Path:

Description:

All but the following file types may be uploaded:
exe,com,dll,ocx,bat,reg,tmp,dat,scr,bak,acl,acm,cpl,ax


☐ Add Multiple

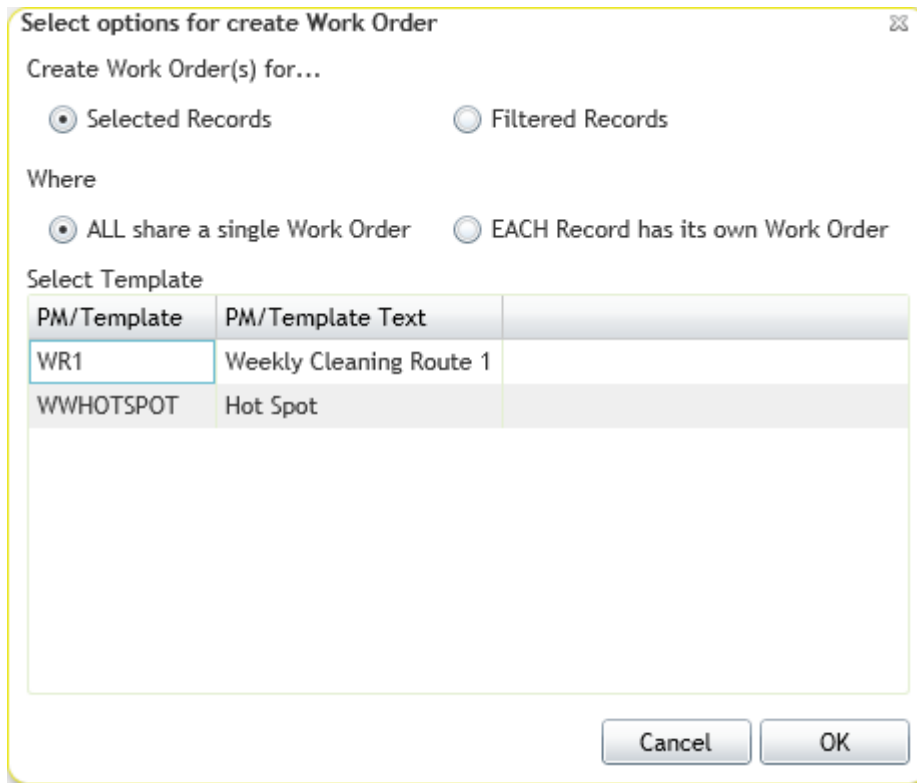
- Enter a Description and browse to the desired document.
- To select multiple documents check the Add multiple box first.
- When complete click Save.
- It is important to remember when adding documents that the document is only linked to the asset in Lucity. If the document is deleted it will no longer be accessible. If the document is on your computer and not available to the network, other users will see that it is attached, but will not be able to view it.
- To upload a document to the web server, use the  button.
- To view the document, use the  button.
- To edit the information for the document, use the  button.
- To delete a document from the list, use the  button.

Notes: _____

Create Work Order

The create work order tool 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 one work order for each record.

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



Select options for create Work Order

Create Work Order(s) for...

☒ Selected Records ☐ Filtered Records

Where

☒ ALL share a single Work Order ☐ EACH Record has its own Work Order

Select Template

PM/Template	PM/Template Text
WR1	Weekly Cleaning Route 1
WWHOTSPOT	Hot Spot


Cancel OK

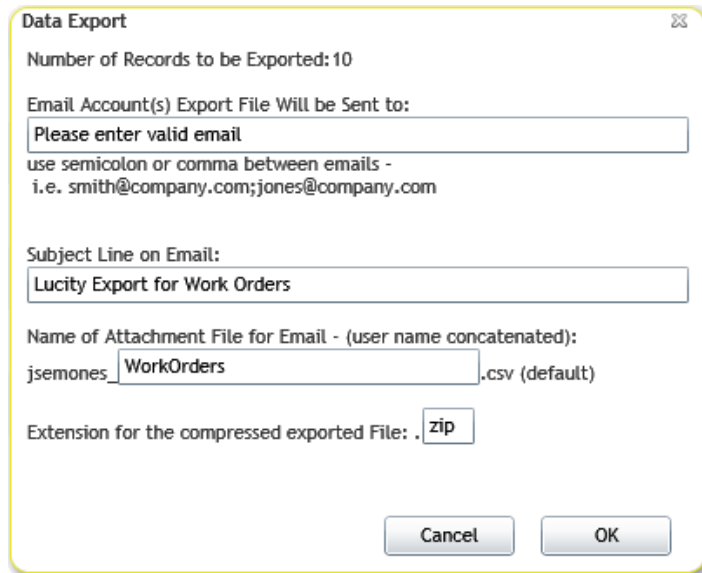
4. Choose whether the work order will be created against the **Selected Records** or against the entire set of **Filtered Records**.
 - o If there is more than one selected or filtered record the **Where** section will be visible.
 - o New for Version 14r2/15, the user can opt to select a Template to help fill in the work order if they wish.
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.

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 your current view into a .csv files, zips it up and then emails it to a specified address.

1. Find the module to pull data from.
2. Create a filter that displays the records to export
3. Click the  button. The following pop-up will appear:



The dialog box is titled "Data Export" and contains the following fields and options:

- Number of Records to be Exported:** 10
- Email Account(s) Export File Will be Sent to:** A text field containing "Please enter valid email". Below it, a note says "use semicolon or comma between emails - i.e. smith@company.com;jones@company.com".
- Subject Line on Email:** A text field containing "Lucity Export for Work Orders".
- Name of Attachment File for Email - (user name concatenated):** A text field containing "jsemones_WorkOrders.csv (default)".
- Extension for the compressed exported File:** A dropdown menu with "zip" selected.
- Buttons:** "Cancel" and "OK".

4. Fill out the **Email Accounts** field.
5. Change the other settings as desired.
6. Click **OK**.
7. The data will be exported and emailed.

Note: This will only export data in the view you are looking at. It does not export data for related or child records.

Notes: _____

Form Buttons


Each form has a series of buttons that are useful.



At the top of each form exists navigation controls allowing the user to (from left to right)

- Go to the first record in the filter set
- To go to the previous record in the filter set
- Provides an idea of which record that they are on and how many records are currently in the filter set



and  are special buttons for sewer pipes and storm conduits allowing users to go upstream and downstream to the next connecting pipe (as long as it is in the filter set)



This saves the edits of the current record and automatically starts a new empty form for entering data



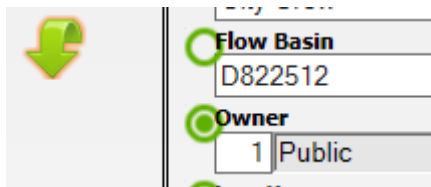
This button allows the user to save the current form and then closes the form to put the user back into view mode.



This button refreshes the form (in case you needed to view some calculations).



This is a cancel button which does not save information that was made to the form and puts the user back into view mode.



The carry over button provides an empty circle for every editable field and allows the user to select one or more fields. When selected, those fields get carried over to the next new record that is added.

Notes: _____

Web Applications – View, Grid, & Form Setup

Now that you understand how the Lucy web flexibility can help you, you will next need to meet with your managers/users again to determine what information would be helpful for which person/group to view and edit. Again, just like setting up the dashboard, we recommend that you begin with small groups that you feel will be able to handle the migration smoothly to get some successes going.

In this section, we'll introduce you to the Administrative User Interface. You'll use this program to set up and customize the look and content of the web-based forms in the Lucy Web application. In addition, the Admin UI allows you to create online menus, assign forms to menus, and give users access to specific menus. These steps enable users to view, add, and edit forms online.

The most important feature to keep in mind is that each web-component created in this program is fully customizable; the images included in this workbook are examples. With this program you have the power to create forms for any and all uses that you can imagine. Here, we've included the basic steps to create your web-based system. What you do with these steps is up to you!

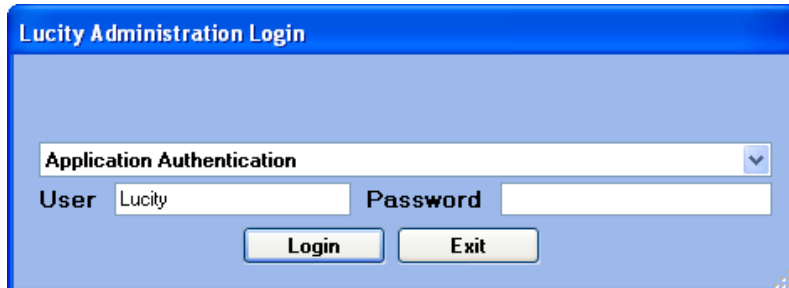
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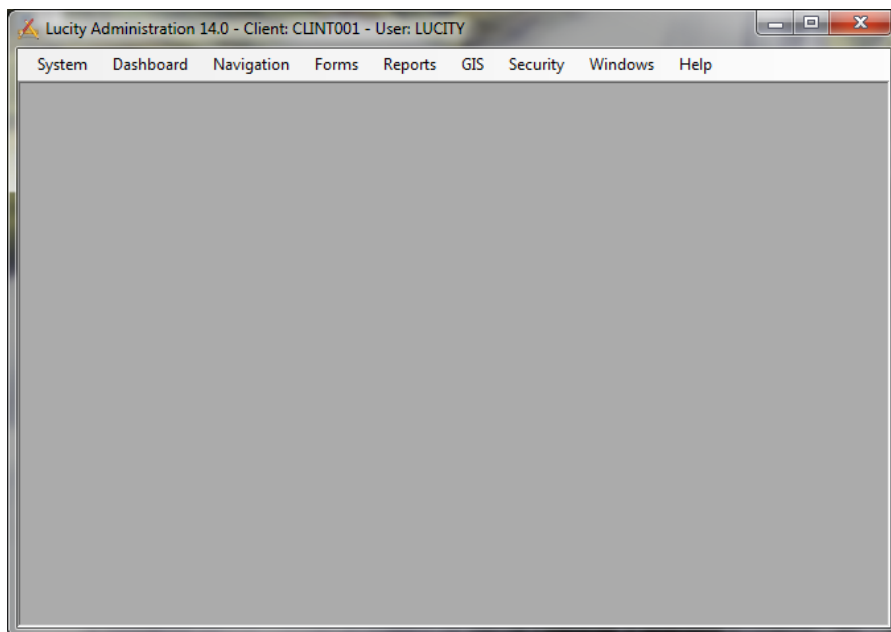
Administrative User Interface

The Lucy Administration program allows you to create custom forms and grids, import pre-configured views, forms, and grids, and assign forms to menus so that they are available to users on the web. To begin using this program, you'll need to login with your Lucy username and password.



After logging in, you'll see the User Interface Administration screen and main menu. These menu options contain the following:

- System - Settings, Connection Strings, Manage Web and Public Web Caches, Object Lock Manager, User License Manager, Active User Manager
- Dashboard - Dashboard Setup (Dashboard Manager) [This is gone in 15r2/16/16r2]
- Navigation - Menus
- Forms - Form Manager, Grid Manager
- Reports - Report Manager
- GIS - Connection Strings, Map Services, Map Setup
- Security - Assign Groups to Forms
- Windows - (standard Windows options: Tile, Cascade)
- Help - About, Help Topics



Creating Custom Forms

The Lucy Web application is composed of fully customizable Views, Forms, and Grids. Brief descriptions of these components are listed below:

Views dictate the overall structure of the online screens. A View displays data in Grid format. You can have a parent grid as well as child grids (these are like the parent modules and child records in the Lucy Desktop application).

Grids are individual components within the Views. They allow you to create parent and child grids. For example, there may be parent Request grids that contain child grids such as Requesters, Comments, or Tracking information. There may also be parent Work Order grids that contain child Resources, Tasks, and Tracking information. Fleet and Equipment forms can be arranged in a similar manner.

Forms are used for adding new records, editing existing records, or viewing details about a single object. Data in Forms is not displayed in grid format. Forms are launched in a separate browser window. These forms must be tied to a Grid unless they are used alone as Request Submittal forms.

While the web system is designed to be fully customizable, we realize that the easiest way to start using forms on your website is to begin with our pre-configured views, forms, and grids. We've developed a number of these to aid you in setting up the web. These pre-configured files are found in the Lucy Install Media > Import Forms folder.

You can import these and then customize them to suit your organization's needs. If desired you can import these multiple times and reconfigure them differently each time. You'll use the Form and Grid Managers to begin creating custom forms. These tools are described in the following pages.

Notes: _____

Creating a View with Grid

Let's start to create a custom view with one grid. For this example, we will use sanitary sewer structures and show just Structure Number, Address information, structure type and structure depth.

From the Main Menu, select Forms, View/Form Manager. You might then get a form that looks something like this:

The screenshot shows the 'View/Form Manager' window. It has three steps for configuration:

- STEP 1: Select Program (Request Manager)
- STEP 2: Select Module (Work Requests)
- STEP 3: Select Module Component (Work Requests)

On the right, there are checkboxes for 'Show forms in preview mode' (unchecked), 'Custom' (checked), 'Views' (checked), 'Templates' (checked), and 'Forms' (checked).

Below the steps is a table titled '22 Views/Forms'.

Name	Type	Enabled	Custom/Template	Assigned To Gr...	Assigned To Me...	Public FormID
ACT2012 Fleet Req	Form	True	Custom	NOT ASSIGNED	NOT ASSIGNED	
ACT2012 GBAMS Fleet Request	View	True	Custom	In Group	NOT ASSIGNED	
ACT2012 Web Request	Form	True	Custom	In Group	NOT ASSIGNED	ACT2009
LUCITY Building Requests	View	True	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Equipment Requests	View	True	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Fleet Req	Form	False	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Fleet Request	View	True	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Req from Customer	Form	False	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Req from Employee	Form	False	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Request Detail Complete	Form	True	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Request from Customer	View	True	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Request from Employee	View	True	Template	NOT ASSIGNED	NOT ASSIGNED	
LUCITY Request General Complete	View	True	Template	NOT ASSIGNED	NOT ASSIGNED	

At the bottom, there are buttons: New, Edit..., Copy..., Delete, Rename..., Assign Group..., and an 'Export' button with an 'Enable Exporting' checkbox.

Lucity prompts you to follow the steps:

Step 1: Select Program (showing Request Manager). The options in this dropdown match the Lucity products that you can purchase (and that are available to use in the grid). In the case, select Sewer.

Step 2: Select Module (showing Work Requests). Each product has several modules that can be launched from within the product. In this case select Structure Inventory.

Notes:

Step 3: Select Module Component (showing Work Requests). There can be many components to a module. The inventory record itself, all children records including inspection records, all grandchildren records, etc. In this case, select Structure Inventory.

View/Form Manager

STEP 1: Select Program: Sewer

STEP 2: Select Module: Structure Inventory

STEP 3: Select Module Component: Structure Inventory

☐ Show forms in preview mode

0 Views/Forms

Name	Type	Enabled	Custom/Template	Assigned To Gr...	Assigned To Me...	Public FormID
------	------	---------	-----------------	-------------------	-------------------	---------------

New Edit... Copy... Delete Rename... Assign Group... ☐ Enable Exporting Export

You will notice that there are no views or forms available yet for this module component.

Enter Information

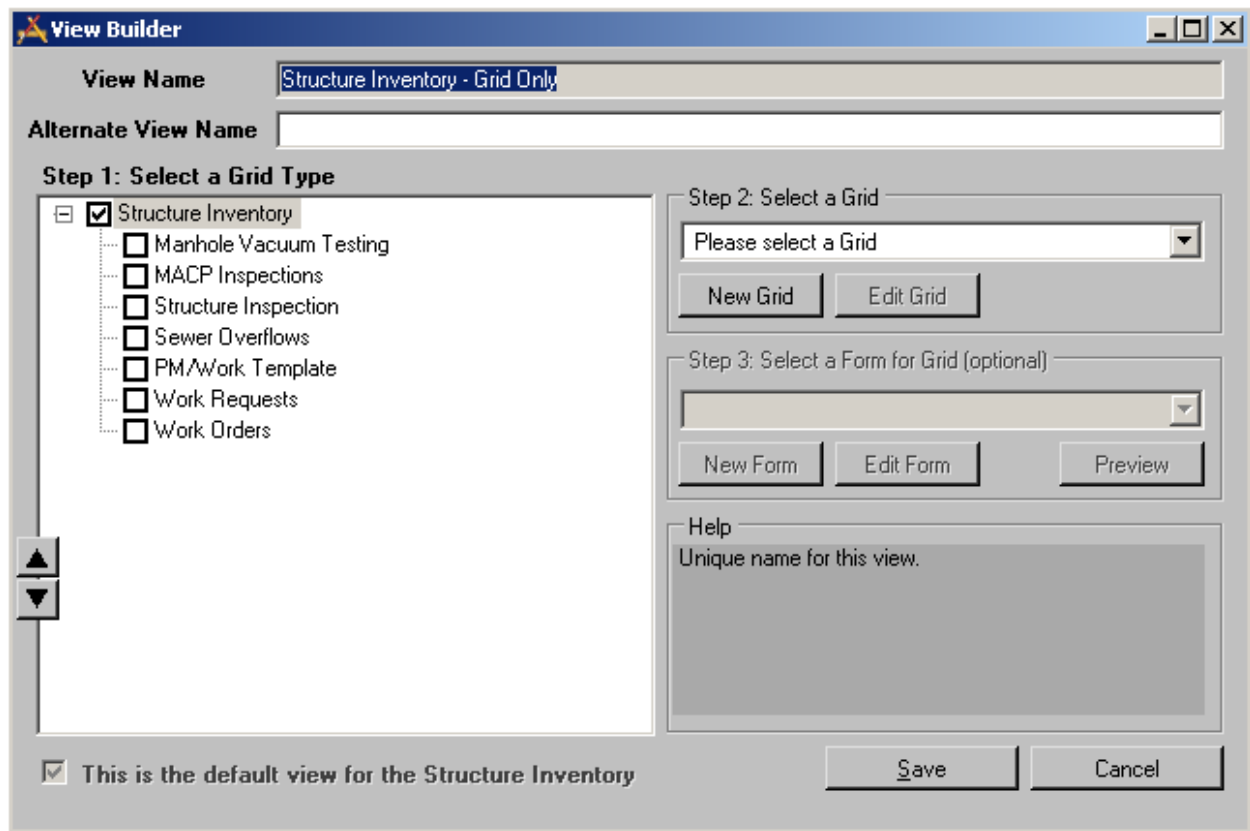
Name: Structure Inventory - Grid Only

☒ View ☐ Form

OK Cancel

Let create a new view first. Hit the new button in the lower left. The Enter information box will pop up. Each View and Form will need a unique name. When setting this up for departments or groups, make sure that you include the name of the department/group in the title. This is a good practice and will make it easier to link grids and forms to views. Once this information is entered, hit OK.

The next page shows the View Builder dialog that then appears.



The View Builder helps step you through the process of creating a View. As stated earlier, a view is any combination of grids and forms.

An Alternate View Name can be entered, if desired. That would be the name that the users will see. In our case we will call this Sewer Structure Inventory

Step 1: allows you to select all of the component types that you want the users to access while in the view. In our case, we want to make it very simple so we are going to leave all of the checkboxes blank except for Structure Inventory.

Step 2: asks us to select a grid to match the grid type. A grid must be selected. However, in our case, we have not created a grid yet so we will need to select the New Grid button. We will do this in just a moment.

Step 3: asks to select the Form for the Grid. This is optional. We do not want a Form for this example so we will leave this blank.

Notice that at the lower left hand corner there is a read-only checkbox that is checked stating that this is the default view for the Structure Inventory. This box is read-only when there is only one view defined for the object. This is important because whenever Lucity is not explicitly notified which View to open; it always opens this default view.

So now let's hit the New Grid button:

Grid Builder

Grid Name

Grid Type **Caption** **Page Size**

Description

Column Editor

Available Columns

- # Holes in Cover
- # of In Drops
- # of In Pipes
- # of Out Drops
- # of Out Pipes
- Address
- Attri X Offset (ft)
- Attri Y Offset (ft)
- Attribute Size
- Attribute Type
- Bench
- Bench Text
- Cleaning Freq
- Cleaning Freq Units
- Cleaning Freq Units Tex
- Collected By
- Component Type
- Component Type Text
- Condition
- Condition Text
- Cone/Top

Selected Columns

Properties

Help
Mouse over a control to see its description.

Manage Buttons

Help **Save** **Cancel**

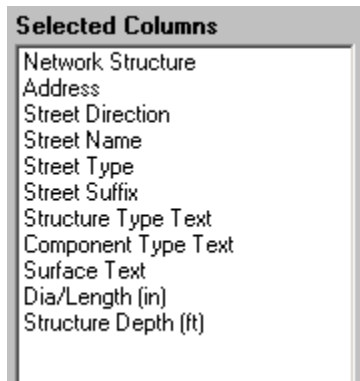
The above scary looking dialog is actually pretty simple to use. First, give it a Grid Name (use Sewer Structure Inventory - Simple). The user does not see this name so you should use something that helps you while you are selecting it from among a greater list.

Caption is something that the user sees. Typically that will always be the same as the Component Name but you could modify it if you wish. Let's leave it alone as that is probably what you would do most of the time.

Page Size determines how many rows of data the user is allowed to see at a time. We have included standard dropdowns of 10, 20, 30, 40 and 50. However, you can type any number that you wish. Remember that screen space can sometimes be at a premium and that the more records that are included in each page, the longer it may take to pull the information from the database and get it displayed. For now, let's change this to 20.

The **Description** you can leave blank unless you wanted to give yourself a longer description as to documentation for the grid development.

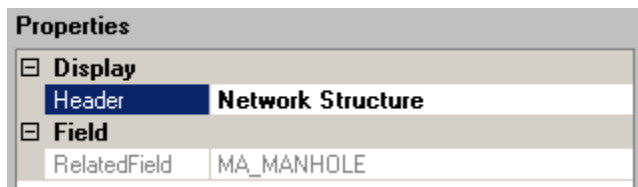
Now we want to select the fields (columns) that you want to display from the column editor. The names displayed are the caption names that appear in the Desktop. If you have never used the desktop, they are the field caption names that Lucity provided or the new captions that you have named the field. These are sorted in alphabetical order. So let's add the fields listed below by finding them in the left hand column and using the arrow key to move it to the middle section.



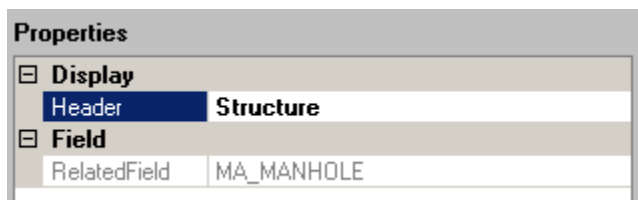
If you accidentally moved a column that you did not want, you can highlight it and move it back to the Available Columns by using the right arrow. You can also move the fields up and down in the list by using the arrows to the right of the Selected Columns.

We recommend that you do not select more than around 10 columns for any one grid - this is especially true for creating grids that will be used for the tablets.

It is pretty likely that you will want to change the name of the column name. This can easily be done. Simply highlight a selected column field - I will use Network Structure as an example



In the Properties dialog, you can then change Network Structure to Structure (or whatever you want).



It appears that we changed almost every one of the columns. It took less than a minute. You will see the new names when the grid appears later.

Now you are ready to Manage Buttons so hit the button so labeled right over the Save button!



and you get the following screen.

A screenshot of the 'Button Rules Form' dialog box. It has a title bar 'Button Rules Form' and a subtitle 'Buttons selected are included over the grid.' Below this is a note: 'Note: Some features are unavailable in child grids, and won't appear regardless of the option selected here.' There are twelve checkboxes arranged in three columns. The first column contains: 'Open In Desktop Button', 'Create New WorkOrder Button', 'Create New Request Button', 'Add New Record Button', and 'Carry Over Button'. The second column contains: 'Report Button', 'Tools Button', 'Delete Button', 'Subset Button'. The third column contains: 'Open In Another View', 'Show In Map Button', 'Filter Button', and 'Documents Button'. All checkboxes are checked. At the bottom are 'OK' and 'Cancel' buttons.

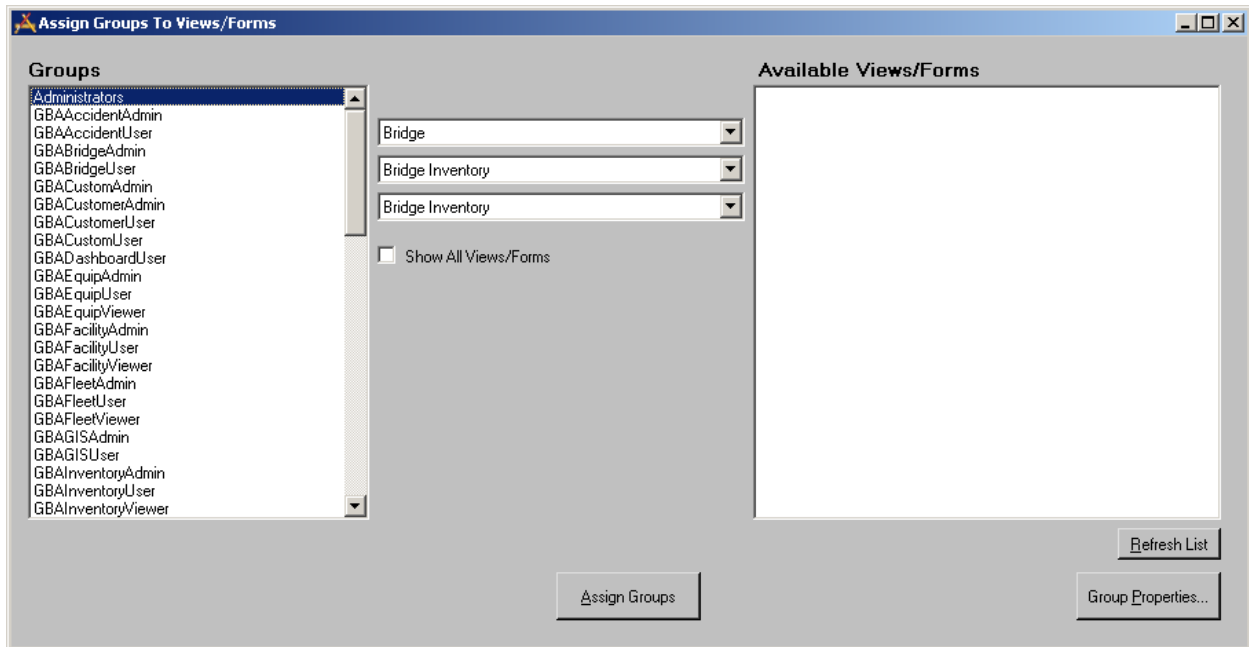
You really do not need to hit the button. However, this allows you to change any of the normal defaults so that you can limit what a user, or a group of users, can do. These settings and the security settings work in concert. Therefore, if you leave the Add New Record Button on the form but the user (or group of users) do not have rights to add a new record, then they would not be able to add a new record anyway. Since we are not attaching any Forms to this grid, we could go ahead and turn off the Add New Record Button and the Carry Over Button since those are two buttons that work with the form. When you are finished making changes to the checkboxes, then hit OK (or cancel).

Now hit Save. The program takes you back to the View Builder.

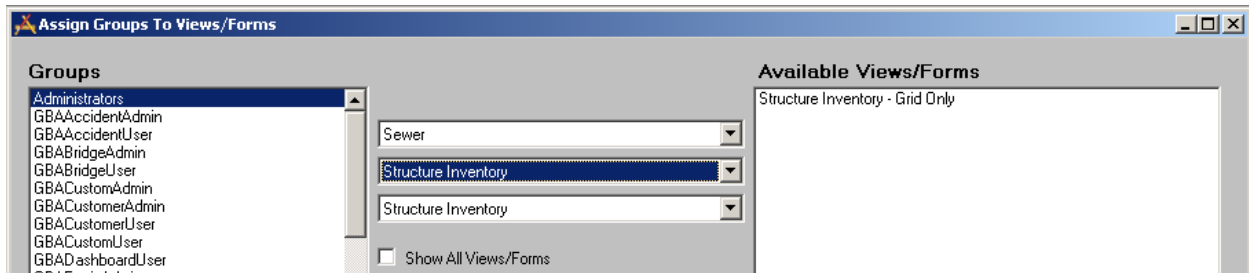
A screenshot of the 'View Builder' dialog box. It has a title bar 'View Builder'. There are two text fields: 'View Name' with the value 'Structure Inventory - Grid Only' and 'Alternate View Name' with the value 'Sewer Structure Inventory'. Below these are two steps. 'Step 1: Select a Grid Type' shows a tree view with 'Structure Inventory' selected, and several sub-items like 'Manhole Vacuum Testing', 'MACP Inspections', etc. 'Step 2: Select a Grid' shows a dropdown menu with 'Sewer Structure Inventory - Simple' selected, and 'New Grid' and 'Edit Grid' buttons. 'Step 3: Select a Form for Grid (optional)' shows an empty dropdown menu, and 'New Form', 'Edit Form', and 'Preview' buttons. At the bottom, there is a checkbox 'This is the default view for the Structure Inventory' which is checked, and 'Save' and 'Cancel' buttons.

Hit the Save button. Congratulations - you have created your first view! Now we have to give users rights to view it.

From the Main Menu, Select Security > Assign Groups to Forms.



The left column shows all of the groups that have been assigned. On the right shows all of the views/forms available. Since the Show All Views/Forms is not checked, then only the forms that are available for the component (Bridge Inventory in this example) appears. Let's change that to Structure Inventory.



Now, you can highlight one or more Groups, highlight the Structure Inventory - Grid Only View and then hit the Assign Groups button to allow those groups the rights to view the View. Let's select the Groups Administrators and SewerViewer as the groups and go ahead and assign it.

Here is what the view looks like in the web app.

Structure Inventory

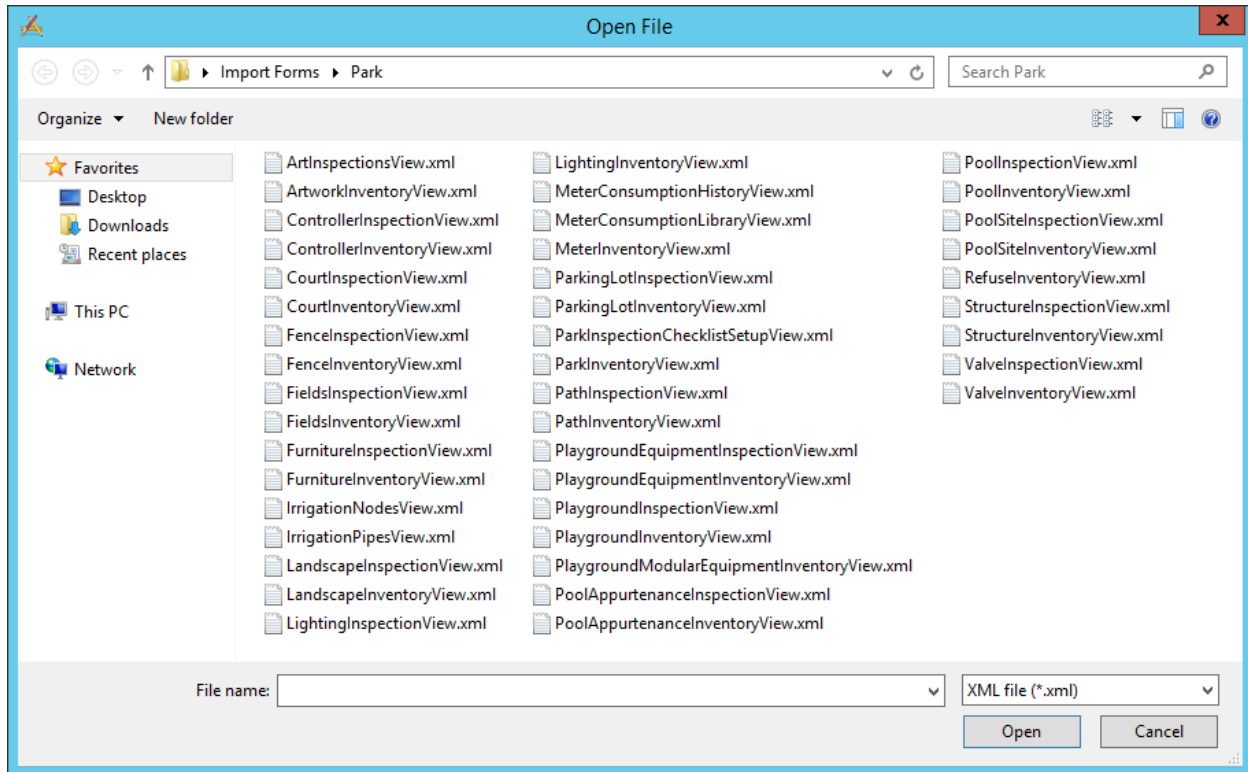
Structure Inventory 20 1 of 24 GO > >>

Structure	Bldg #	Dir	Street Name	Type	Suffix	Structure Type	Component Type	Surface	Dia (in)	Depth (ft)
113486	1564	E	VALENCIA	ST		Standard	Standard	Asphalt	52.0	3.00
113487	165	E	VALENCIA	ST		Standard	Standard	Asphalt	23.0	1.00
113488	166	E	VALENCIA	ST		Standard	Standard	Asphalt	23.0	1.00

Importing Views/Forms/Grids

While creating one grid is pretty simple, it may take a long time to create each one exactly the way that you want it. An alternative is to use some forms that Lucity has previously created for you. These forms/views typically have all fields displayed but in a logical (at least for us) sequence. As an example, let's import a Park Court view.

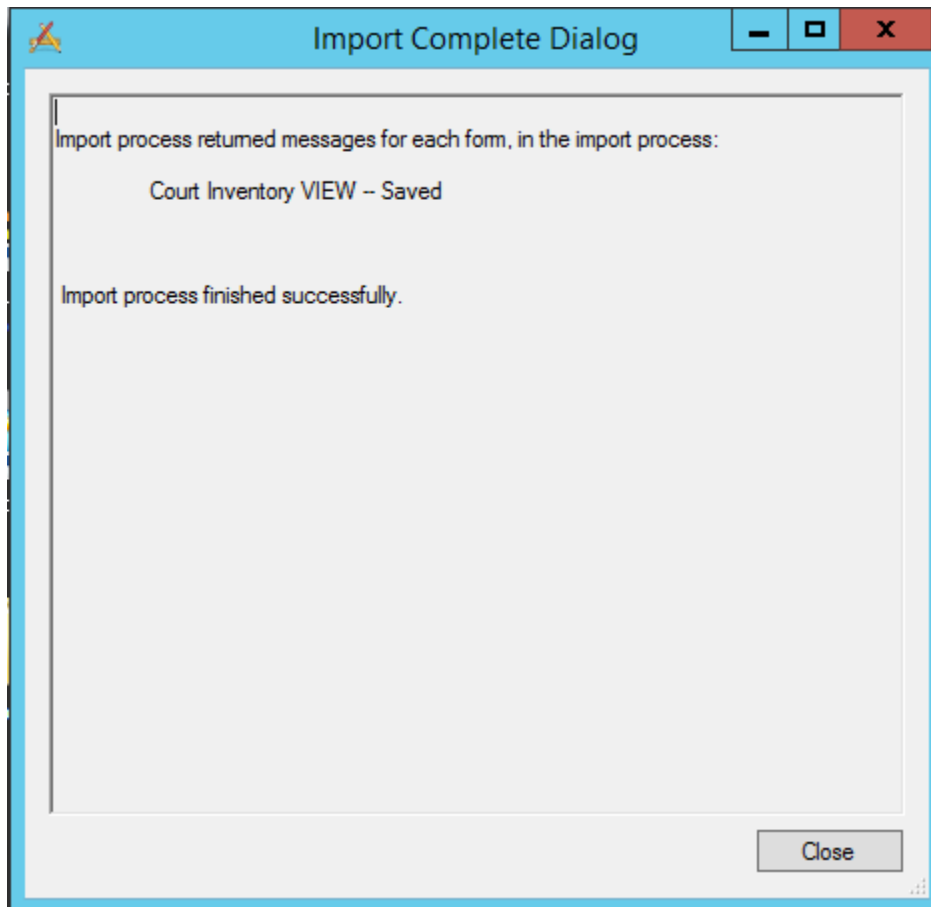
From the main menu, select Forms > Import from XML.



All of the views and forms that we have previously created and exported are available in a directory by product type. Let's select CourtInventoryView. Select it and hit open.

Notes: _____

You will get the following dialog:



There were no errors in the import program and this dialog tells you that the Import is Complete. Hit the Close button.

Notes: _____

Now, let's open the view. From the Main menu, select Forms, View/Form Manager. Switch the Program to Parks, Module to Court Inventory (the module component always defaults to the parent component). You will notice that there is one view now called Court Inventory and another record called Court Inventory Form. While the Court Inventory record is highlighted go ahead and hit edit.

View/Form Manager

STEP 1: Select Program: Park

STEP 2: Select Module: Park Courts

STEP 3: Select Module Component: Park Courts

☐ Show forms in preview mode

☒ Forms

☒ Views

2 Views/Forms

Name	Type	Enabled	Is Default View	Assigned To Gro...	Assigned To Menu	Public FormID
Court Inventory	View	True	Yes	NOT ASSIGNED	NOT ASSIGNED	
Court Inventory Form	Form	True		NOT ASSIGNED	NOT ASSIGNED	

Buttons: New, Edit..., Copy..., Delete, Rename..., Assign Group..., Enable Exporting, Export

View Builder

View Name: Court Inventory

Alternate View Name:

Step 1: Select a Grid Type

- ☒ Park Courts
 - ☒ Park Court Associations
 - ☐ Park Court Inspections
 - ☐ Work Orders
 - ☐ Work Requests
 - ☐ PM/Work Templates
 - ☐ Park Comment Grid

Step 2: Select a Grid

Court Inventory

New Grid Edit Grid

Step 3: Select a Form for Grid (optional)

Court Inventory Form

New Form Edit Form Preview

Help: Mouse over a control to see its description.

☒ This is the default view for the Park Courts

Save Cancel

The above screen shot shows that multiple grids and forms were imported for Court Inventory. It has a Court Inventory Grid, a Court Inventory Form and at least a Park Court Association Grid. Let's edit the Court Inventory Grid (Step 2 - Select a Grid - Edit Grid)

The screenshot shows the 'Grid Builder' window with the following configuration:

- Grid Name:** Court Inventory
- Grid Type:** Park Courts
- Page Size:** 10
- Description:** (Empty text box)
- Column Editor:**
 - Available Columns:** Address, Address 2, Address2 Direction, Address2 Name, Address2 Suffix, Address2 Type, Area, City, City Text, Consequence of Failure, Court Rec #, Created By, Creation Date Time, Default WO Cat, Default WO Cat Text, Dimensions, Document Available, Dollar Value, Drawing Number, Elevation, Finance Codes.
 - Selected Columns:** Alt Park ID, Park Name, Alt Court ID, Court Name, Purpose Text, Status Text, Location, Material Type Text, Surface Coating Text, Last Inspection, Overall Cond Text, Next Inspection.
- Properties:**
 - Display:** Header: Alt Park ID
 - Field:** RelatedField: PK_NUMBER
 - Header:** Text to display at the top of the column in the grid.
- Buttons:** Help, Save, Cancel, Manage Buttons.

You can see that many of the fields have been placed in the Selected Columns. Now, it is simply a matter of moving fields into or out of the Selected Column and changing their properties (the names of each column) if you wish and modifying the grid buttons.

You will now notice the Court Inventory Form in the list of views/forms. Go ahead and select it and hit Edit.

A preview of the Form appears and shows how the imported form will basically look to the user. These are detailed forms mostly, meaning that they show every field that Lucy stores regarding the item. In this case they show Court Inventory. Later, we will be going over how to edit/modify the form. For now, let's accept it as is. So let's close the form by hitting the X in the upper right hand corner or Form > Close from the menu.

Now open the Court Inventory View and attach the form to the view and hit save. We will go over editing the form in a later section. Remember that we must assign Groups to both the view and form.

View/Form Manager

Let's take a little closer look at the View/Form Manager. Since we just imported the Court Inventory information, it automatically created one view and one form. Forms almost always work in conjunction with Views except for Submittal Forms (think Request Submittals). Also, the program always makes the first View of a module the Default View.

Name	Type	Enabled	Is Default View	Assigned To Gro...	Assigned To Menu	Public FormID	A
Court Inventory	View	True	Yes	NOT ASSIGNED	NOT ASSIGNED		
Court Inventory Form	Form	True		NOT ASSIGNED	NOT ASSIGNED		

1. The columns in the table contain the following identification information:
 - The Name and Type (View or Form).
 - An indication that the form has been enabled. Only forms that have been enabled can be assigned to menus.
 - An indication whether the item has been Assigned to Groups and Assigned to Menus. (We'll discuss how to complete these steps later in this workbook).
 - The Public Form ID. This is used for Lucity Web Citizen forms.
 - The last modified by and last modified date information.
2. You can use the buttons below the table to add new forms/views, Edit existing forms/views, Copy existing forms/views, Delete existing forms/views, or Rename existing forms/views.
3. The Assign Group button can be very handy. This allows a user to quickly assign the forms for the selected component to groups without having to do a search.

View Builder

Remember, Views are used to designate the overall structure of your online forms. A View displays data in grid format. You can have parent grids as well as child grids (these are like the parent modules and child records in the Lucity Desktop application). You will use the View Builder to indicate which Grids will appear in the Views, and then associate individual Forms with the Grids you select. Only previously defined Grids and Forms can be added to your Views. When you copy a View, all of the Grids and Forms contained therein will be copied as well. This allows you to quickly begin using forms on the web.

A sample of the View Builder appears below. This particular sample displays the “Eval Work Order Complete” form. As you can see, it contains a number of Grids, each with Forms attached.

The screenshot shows the 'View Builder' window with the title bar 'View Builder' and standard window controls. The 'View Name' field is set to 'Eval Work Order Complete'. The 'Alternate View Name' field is empty. The interface is divided into three main sections: 'Step 1: Select a Grid Type', 'Step 2: Select a Grid', and 'Step 3: Select a Form for Grid (optional)'. In Step 1, a tree view shows 'Work Orders' selected, with sub-items like 'Work Order Locations', 'Work Order Assets', 'Work Order Checklists', 'Work Order Events', 'Work Order Tasks', and various resource types (Employees, Equipment, Materials, Fluids, Contractors) all checked. Other items like 'Work Order Tracking', 'Work Order Comments', 'Daily Inspections', 'Work Orders', 'Work Requests', 'PM/Work Templates', 'Work Permits', 'Work Water Loss', and 'Utility Locates' are unchecked. Step 2 shows 'EVAL1 WO Complete Grid' selected in a dropdown menu, with 'New Grid' and 'Edit Grid' buttons. Step 3 shows 'EVAL1 Work Order Detail Complete' selected in a dropdown menu, with 'New Form', 'Edit Form', and 'Preview' buttons. A 'Help' section at the bottom right says 'Mouse over a control to see its description.' At the bottom, there are checkboxes for 'Offline Mobile' (checked) and 'This is the default view for the Work Orders' (checked), along with 'Save' and 'Cancel' buttons.

View Name Eval Work Order Complete

Alternate View Name

Step 1: Select a Grid Type

- ☒ Work Orders
 - ☒ Work Order Locations
 - ☒ Work Order Assets
 - ☐ Work Order Task to Asset Links
 - ☒ Work Order Checklists
 - ☒ Work Order Events
 - ☒ Work Order Tasks
 - ☒ Work Order Resources - Employees
 - ☐ Work Order Resources - Employees - Cost Mark
 - ☒ Work Order Resources - Equipment
 - ☐ Work Order Resources - Equipment - Cost Mark
 - ☒ Work Order Resources - Materials
 - ☐ Work Order Resources - Materials - Cost Marku
 - ☒ Work Order Resources - Fluids
 - ☐ Work Order Resources - Fluids - Cost Markup
 - ☒ Work Order Resources - Contractors
 - ☐ Work Order Resources - Contractors - Cost Mar
 - ☐ Work Order Assets
 - ☒ Work Order Tracking
 - ☒ Work Order Comments
 - ☐ Work Order Resulting Tasks
 - ☐ Daily Inspections
 - ☐ Work Orders
 - ☐ Work Requests
 - ☐ PM/Work Templates
 - ☐ Work Permits
 - ☐ Work Water Loss
 - ☐ Utility Locates

Step 2: Select a Grid

EVAL1 WO Complete Grid

New Grid Edit Grid

Step 3: Select a Form for Grid (optional)

EVAL1 Work Order Detail Complete

New Form Edit Form Preview

Help

Mouse over a control to see its description.

☒ **Offline Mobile**

☒ **This is the default view for the Work Orders**

Save Cancel

1. When you customize Views you can provide an alternate form name. This alternate name will be the one seen by end-users on the website.
2. You may also designate one “Default” View per module (i.e. one for Work Orders and one for Requests). The “Default” View will be opened when special tools are used on the web such as *Create Work Order from Request*. Work Orders is a special case, for these a default View for each group can be created.

To designate this example as the “Default” View for the Work Order module, simply mark the checkbox located at the bottom of the View Builder.

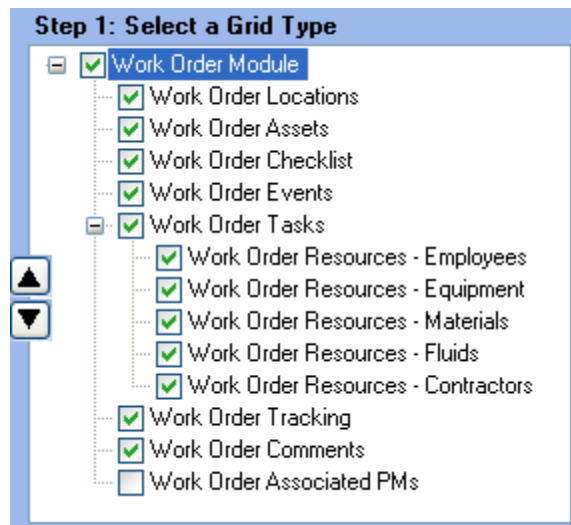
☐ **This is the default form for the Work Order Module**

3. On the left-hand side of the dialog you can see a section titled “Step 1: Select a Grid Type”. This section lists all grid types available for this View. The list of available types is determined by the type of form you selected in the Form Manager.

Mark the checkboxes for each grid you would like to add to the View. This will create the overall structure of the web form.

In the example below, we have included a Work Order Module grid, as well as Work Order Locations, Work Order Assets, Work Order Checklist, Work Order Events, Work Order Tasks, Employee Resources, Equipment Resources, Material Resources, Fluid Resources, Contractor Resources, Work Order Tracking, and Work Order Comments grids.

Use the up or down arrows to the left of this section to change the order in which the Grids will appear on the View.



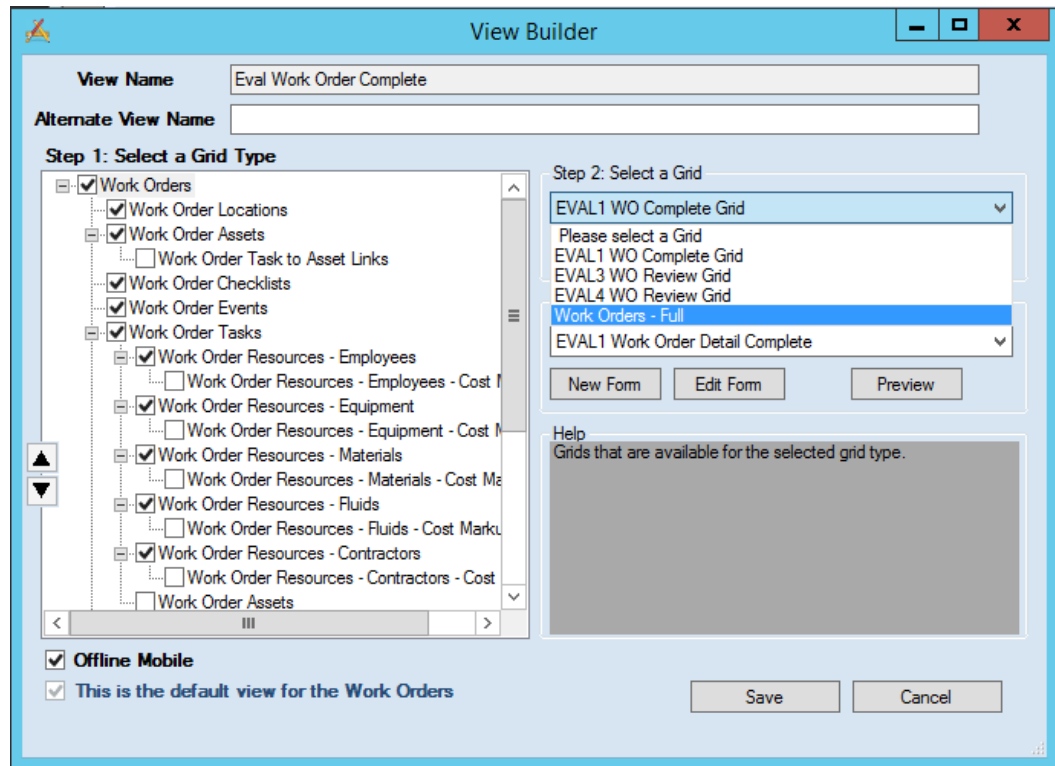
4. After selecting the types of grids, you can choose specific custom grids to add to the View.

Highlight a Grid Type in the left-hand section (Step 1: Select a Grid Type).

From the drop-down list under “Step 2: Select a Grid”, choose a pre-defined, custom grid to add to your View. The grids listed will change depending on the grid type highlighted.

Continue to add grids for each of the grid types marked in the first section.

If none of the grids in the list suit your needs, you can use the buttons below the list to create a new grid or edit an existing grid using the Grid Manager.

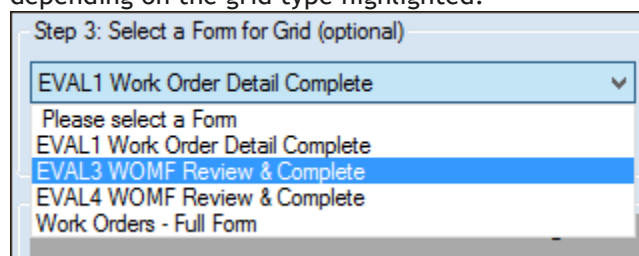


- The final step in customizing Views is to add Forms to the selected Grids. In order for Forms to be edited on the web, they must be assigned to a Grid in this step.

Highlight a Grid Type in the left-hand section (Step 1: Select a Grid Type).

Choose a custom Grid (Step 2: Select a Grid).

From the drop-down list under “Step 3: Select a Details Form for Grid”, choose a pre-defined, custom Form to add to the Grid on your View. The forms listed will change depending on the grid type highlighted.



To see the forms as they would appear online, highlight a form name and click the *Preview* button. The Control Preview window will open.

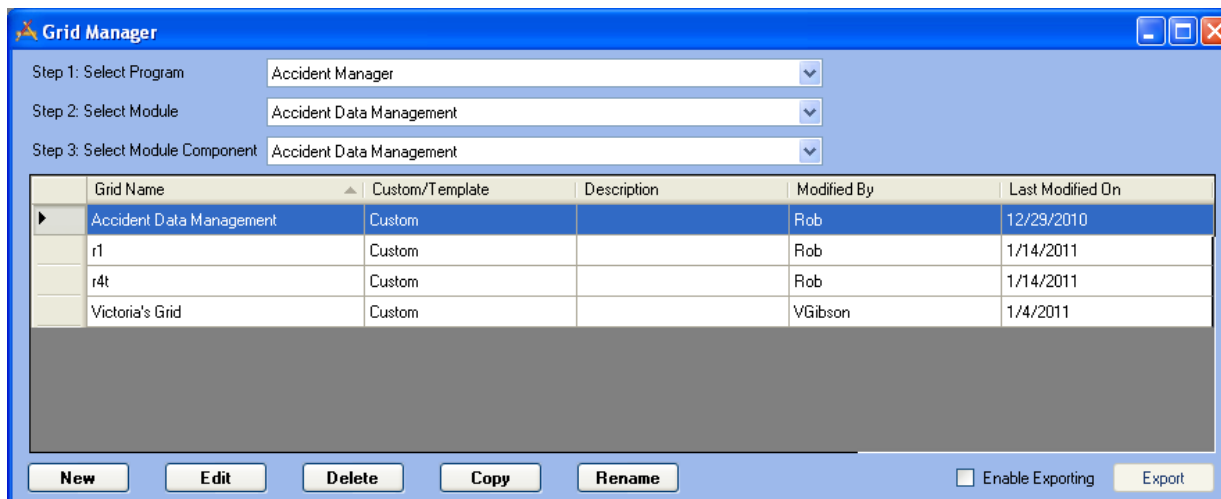
If none of the forms in the list suit your needs, you can use the buttons below the list to create a new form or edit an existing form using the Detailed Form Editor.

Continue adding Forms to each of the Grids.

Save the View when you have completed this process.

Grid Manager

The Grid Manager allows you to customize imported grids or create custom grids and indicate what specifically will appear in each. As we just demonstrated, you can then associate Forms with the Grids you define using the View Builder.



1. To use the Grid Manager, select a program from the first drop-down menu.
2. Then, select a module from the second drop-down menu. Available selections will change depending on which program was selected in the previous step.
3. Next, select a module component from the third drop-down menu. This selection dictates the type of grids you'll be able to create. The available components are determined by the module you selected in the previous step.
4. The grids displayed in the table will change depending on the selections you made above. In our example, only Work Order Module grids are displayed. Had we made other selections, different types of grids would appear in the table. The columns in the table contain the following identification information:
 - The grid name and description.
 - The last modified by and last modified date information.
5. You can use the buttons below the table to add new grids, Edit existing grids, Copy existing grids, Delete existing grids, or Rename existing grids.

Note that the Grid Manager already contains several copies of Imported Grids. These were created when you copied Views earlier in this workbook. Copied Grids are easily identified by the prefix that you assigned.

Defining General Grid Information

At the top of the Grid Builder you'll include general information about the grid:

1. The Grid Name field allows you to create a unique name for the grid. If the name is not unique, you'll receive an error when you attempt to save the grid. Be sure to create a recognizable name as you'll select grids from a list when creating Views.

- The Grid Type is pre-determined by the selections you made in the Grid Manager. For example, the grid below is for the Work Order Module.

The screenshot shows the 'Grid Builder' application window. At the top, there's a header bar with the title 'Grid Builder'. Below it, the 'Grid Name' is set to 'LR WO Complete Grid'. The 'Grid Type' is 'Work Orders', the 'Caption' is 'Work Orders', and the 'Page Size' is '10'. A 'Description' field contains the text: 'WO Grid focused on reviewing WO information while allowing for grid sorting'. Below this, the 'Column Editor' section is visible, showing a list of 'Available Columns' on the left and 'Selected Columns' in the middle. The 'Available Columns' list includes fields like 'Billed', 'Billing Amount', 'Billing Processed', 'Billing Required', 'Category', 'Cause', 'Cause Text', 'Classification', 'Classification Text', 'Comment to Crew', 'Contact Name', 'Contractor Cost', 'Contractor Cost Diff', 'Date Bill Sent', 'Department', 'Department Text', 'Division', 'Division Text', 'Document Available', 'End Time', and 'Equipment Cost Diff'. The 'Selected Columns' list includes 'Work Order #', 'Category Text', 'Main Task Text', 'Problem Text', 'Reason Text', 'Lead Worker Text', 'Assigned Crew Text', 'Supervisor Text', 'Status', 'Status Text', 'Status Date', 'Start Date', 'End Date', and 'Comment From Request'. On the right, the 'Properties' section shows 'Display' settings (Header: 'Comment From R'), 'Field' settings (RelatedField: 'WO_MEMO1'), and 'Misc' settings (CommonIdPa, Supervisor Text, CommonIdPa, UserFriendlyL). At the bottom right, there are buttons for 'Manage Buttons', 'Help', 'Save', and 'Cancel'.

- You can edit the grid Caption. By default, this field will contain the Grid Type. This will be displayed at the top of the grid on the website.
- The Page Size field allows you to indicate the number of records that can be displayed on the web page. The maximum number allowed is 999, but we recommend you keep numbers low (around 10 records per page). For example, if you are creating a Work Order Module grid (like the one displayed below), you can indicate whether you'd like to have 5, 10, or 15 Work Order records displayed at a time on the website.
- The Description field allows you to explain the purpose of the grid. This description will appear in the Grid Builder to help you identify the Grid in this record.
- You can also control which toolbar buttons appear on screen along with each grid. Click on "Manage Buttons" button, and uncheck the checkbox for buttons you want to exclude from the grid.

Notes: _____

Adding Columns

On the left-hand side of the dialog you'll see a list of the columns available for use in the grid. This list will change depending on the type of grid selected (i.e. Work Order Module, Work Resources, Fleet, etc.). Each column may only be added once per grid. Columns that have already been added to the grid appear in red text.

1. To add columns to the grid, double-click on a listing or highlight it and use the right arrow button alongside the list. The selected columns will appear in the center "Selected Columns" list.
2. To change the arrangement of the columns on the grid, use the up and down arrows beside the center list.
3. To remove columns from the grid, use the left arrow button.

Notes: _____

Selecting Column Properties

The properties dialog appears on the right-hand side of the screen. It allows you to set the properties for individual columns.

1. To make changes to a column's properties, simply click on a property in the right-hand dialog. The property name will be highlighted. The following properties are available:

Header - The text that will be displayed above the column in the grid.

Width - The width of the column in pixels. This is only used for Comment columns and will serve to limit the Comment text displayed in the grid.

Related Field - The field in the Lucity database to which the column is mapped. This is a read-only field.

2. Place your cursor in the field to the right of the property name. You can then type directly in that field.
3. Save your changes.

The screenshot shows the 'Grid Builder' application window. The 'Grid Name' is 'SG WQ Complete Grid', 'Grid Type' is 'Work Orders', 'Caption' is 'Work Orders', and 'Page Size' is '10'. The 'Description' field contains 'WQ Grid Focused on Reviewing WQ information quickly while allowing for grid sorting'.

The 'Column Editor' section has two panes: 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes 'Account #', 'Actual Equip Cost', 'Actual Labor Cost', 'Actual Labor Hours', 'Actual Material Cost', 'Area', 'Area Text', 'Assigned By', 'Assigned By Text', 'Assigned Crew', 'Assigned Date', 'Assigned Time', 'Bill Cell #', 'Bill Cust Address', 'Bill Cust City', 'Bill Cust ID', 'Bill Cust Last Name', 'Bill Cust Name', 'Bill Cust No', 'Bill Cust Phone', and 'Bill Cust State'. The 'Selected Columns' list includes 'Work Order #', 'Category Text', 'Main Task Text', 'Problem Text' (highlighted with a red circle), 'Reason Text', 'Lead Worker Text', 'Assigned Crew Text', 'Supervisor Text', 'Status', 'Status Text', 'Status Date', 'Start Date', 'End Date', and 'Comment From Request'.

The 'Properties' dialog is open on the right, showing the 'Display' tab. The 'Header' is 'Problem Text'. The 'Field' tab shows 'RelatedField' as 'WQ_PROB_TY'. The 'Misc' tab shows 'CommonIdPa' and 'UserFriendlyL'.

The 'Help' section at the bottom left says 'Mouse over a control to see its description.' The 'Manage Buttons' section at the bottom right has 'Help', 'Save', and 'Cancel' buttons.

Detailed Form Editor

As we mentioned earlier, Forms are used for adding new records, editing existing records, or viewing details about a single object. When you have imported a form you can then customize it as needed. A copy of the “Work Order Detail Complete” form appears below. This is the Form assigned to the Work Order Module Grid in the “WO Complete” View.

Form Editor - Enter & Complete Form

Form Edit View

Form Toolbar

Form Details

Category

Problem

Main Task

Assigned Crew

Lead Worker

Reason

Status

Work Order #

Component

Component Type	Category
FieldName	WO_CAT_CD
FieldsTableID	25
PropertyName	CategoryCode
TableName	WKORDER

Data

CarryOver True

CarryOver

If True, show Carry Over button.

Limit List

Form Preview

Form Preview

Category*

Problem

Main Task

Assigned Crew

Lead Worker

Reason

Status

Work Order #

2 New Work Order

Submit


Form Preview

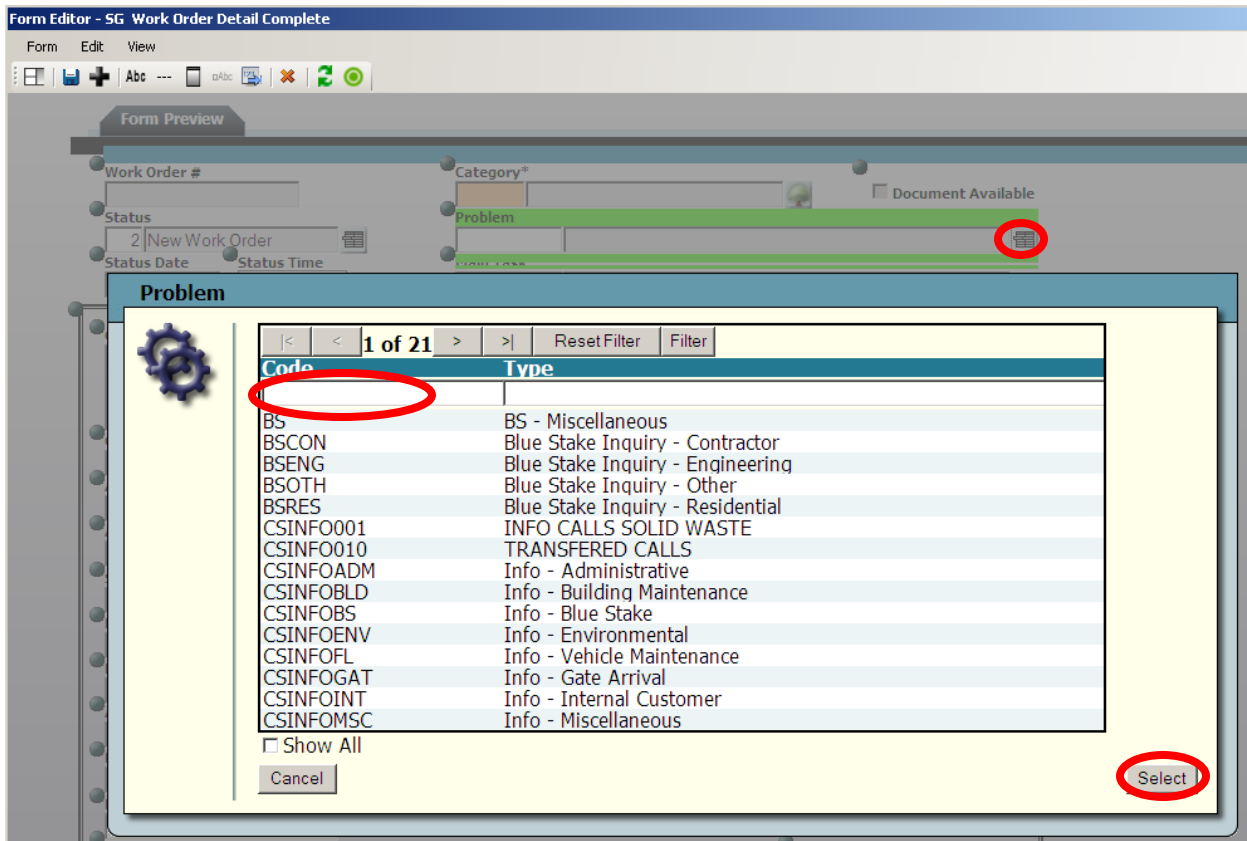
This editor allows for complete customization and acts as a blank canvas for you to create as many custom forms as needed. Each time you add a field, label, frame, behavior item, or alter a field property, those changes will appear automatically in the editor. This allows you to make small modifications, check your work, and see what else is needed to customize your form.

Notes:

Viewing Fields on the Form

As we mentioned above, the Detailed Form Editor allows you to view fields as they will appear on the website. You're even able to type data into the fields, mark checkboxes, and access pick lists to see how each field functions. Below, we've shown an example of the Problem pick list.

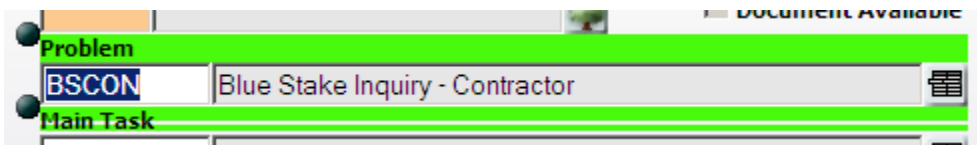
1. Click on the  button beside the Problem field to access the pick list.
2. Locate a Problem in the list, highlight it, and click *Select*.
3. The Problem will now be identified on the form. At this time, you'll be able to see if any other fields were automatically populated by the system based on your *Work Flow Setup*.



The screenshot shows the 'Form Editor - SG Work Order Detail Complete' interface. The 'Problem' field is highlighted in bright green. A pick list is open, showing a table of problem codes and types. The 'Code' column is circled in red. The 'Select' button at the bottom right of the pick list is also circled in red.


Code	Type
BS	BS - Miscellaneous
BSCON	Blue Stake Inquiry - Contractor
BSENG	Blue Stake Inquiry - Engineering
BSOTH	Blue Stake Inquiry - Other
BSRES	Blue Stake Inquiry - Residential
CSINFO001	INFO CALLS SOLID WASTE
CSINFO010	TRANSFERRED CALLS
CSINFOADM	Info - Administrative
CSINFOBLD	Info - Building Maintenance
CSINFOBS	Info - Blue Stake
CSINFOENV	Info - Environmental
CSINFOFL	Info - Vehicle Maintenance
CSINFOGAT	Info - Gate Arrival
CSINFOINT	Info - Internal Customer
CSINFOMSC	Info - Miscellaneous

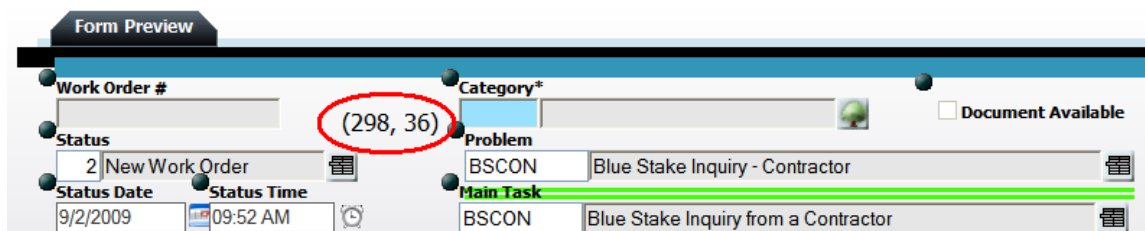
4. Note that the field currently selected on the form is outlined in bright green. This helps you quickly identify the field you are working with.



This close-up shows the 'Problem' field with the value 'BSCON' selected, which corresponds to 'Blue Stake Inquiry - Contractor'. The field is outlined in bright green.

Locating Field Position on the Form

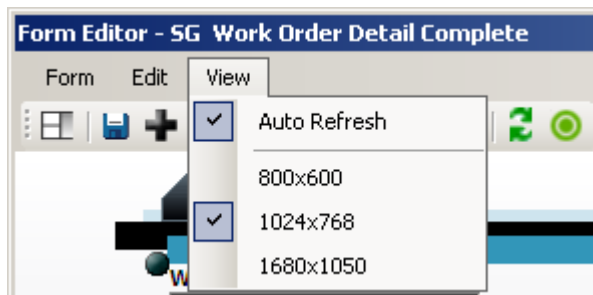
You can easily change the arrangement of fields on the form by clicking on the handle  beside each field and dragging it with your mouse. As you drag fields on the form, the field position will be displayed. This allows you to verify proper field placement. Note that the form size will automatically adjust to accommodate your fields.




The image shows a 'Form Preview' window with a blue header. Below the header, there are several form fields. A red circle highlights a black circle handle next to the 'Status' field, with the coordinates '(298, 36)' displayed next to it. The fields include 'Work Order #', 'Status' (with a dropdown showing '2 New Work Order'), 'Status Date' (9/2/2009), 'Status Time' (09:52 AM), 'Category*' (with a dropdown showing 'BSCON'), 'Problem' (Blue Stake Inquiry - Contractor), 'Main Task' (highlighted in green), and 'Main Task' (Blue Stake Inquiry from a Contractor). There is also a 'Document Available' checkbox.

Changing Screen Sizes

The View menu at the top of the Detailed Form Editor allows you to change your screen resolution to 800 x 600, 1024 x 768, or 1680 x 1050. This feature allows you to see how your custom forms will appear to end users with different size computer monitors. When designing forms, you should take into consideration that some users, particularly those in the field, may have lower resolution monitors than those in the office.

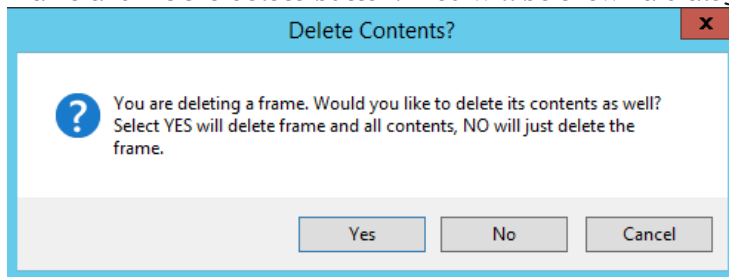


Deleting Fields on the Form

To remove a field from the form, select it by clicking with your mouse. Remember, selected items are underlined in green. Then, click the  button. Note that you cannot remove fields that are required by the Lucity Desktop application. These fields are forced to remain on the form by the system; this button will be disabled when one of these fields is selected. However, you can hide required fields so they cannot be seen.

You can delete many fields at once if all of the fields are together in a Frame. Simply highlight the

Frame and hit the delete button. You will be shown a dialog as follows:

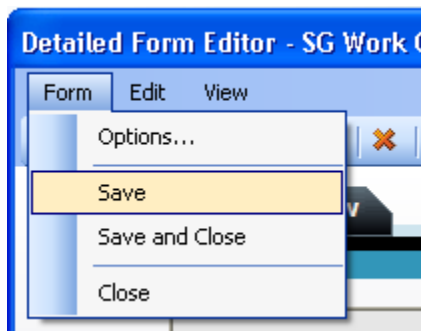



By selecting Yes, it will all of the fields within the Frame will be automatically deleted.

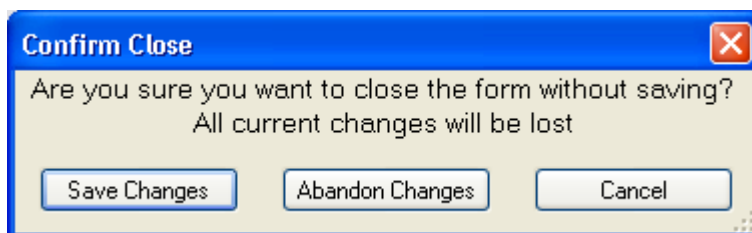
Saving an Edited Form

You have three options when saving your changes to a form:

1. Select **Form>>Save** to save all modifications to the form and continue working.
2. Select **Form>>Save and Close** to save all modifications to the form and close the Detailed Form Editor.




3. Click the  in the corner of the Detailed Form Editor and select *Save Changes* from the resulting dialog. This will save all modifications to the form and close the Detailed Form Editor.



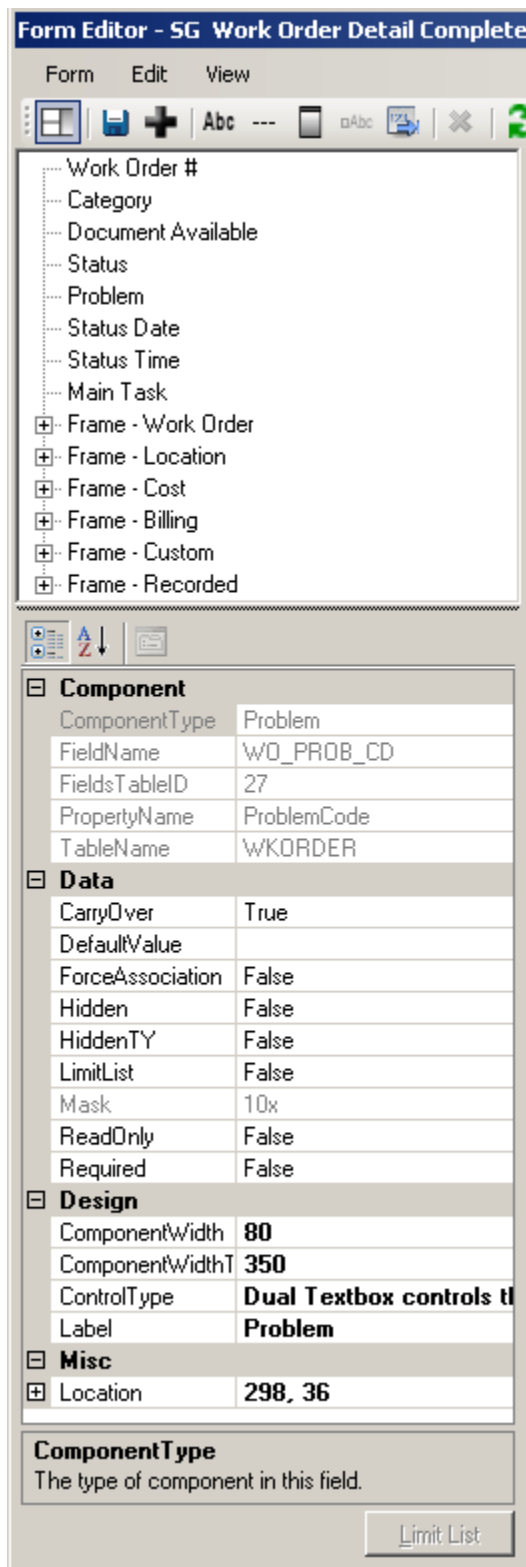
Now let's start editing a form. First, after importing a form let's make a copy of it so we can play with it. Select Work Orders - Full Form and hit the Copy button at the bottom. Notice how you can only copy Forms and not views. Give it a name of Work Orders ACT. Then select Edit Now.

Form Details

The Form Details window lists all fields and components currently included on the form and identifies each field or component's properties. You can use this window to customize the properties as needed.

1. Click the  button to show or hide the details window.
2. The top half of the details window lists all fields and components currently included on the form in the order that they appear. As you move fields and components in the Detailed Form Editor, the list order will change automatically.
3. Select a field or component on the form by either clicking on its name in the list or clicking on its location on the form. The selected component will be underlined in bright green.
4. The properties displayed will change depending on which field or component is selected. These properties allow you to make fields read-only or required, include default values, re-label fields and components, resize fields and components, and much more.
5. Changes made to each field or component's properties will appear automatically in the Detailed Form Editor. This allows you to make small modifications, check your work, and see what else is needed to customize your form.

In the following pages, we'll go over specific examples of some of the individual properties that you can configure.



Form Editor - SG Work Order Detail Complete

Form Edit View

Work Order #
Category
Document Available
Status
Problem
Status Date
Status Time
Main Task
+ Frame - Work Order
+ Frame - Location
+ Frame - Cost
+ Frame - Billing
+ Frame - Custom
+ Frame - Recorded

Component

ComponentType	Problem
FieldName	WO_PROB_CD
FieldsTableID	27
PropertyName	ProblemCode
TableName	WKORDER

Data

CarryOver	True
DefaultValue	
ForceAssociation	False
Hidden	False
HiddenTY	False
LimitList	False
Mask	10x
ReadOnly	False
Required	False

Design

ComponentWidth	80
ComponentWidthT	350
ControlType	Dual Textbox controls t
Label	Problem

Misc

+ Location	298, 36
------------	---------

ComponentType
The type of component in this field.

Limit List

Design

1. You can specify the Component Height and Component Width (where applicable). These properties indicate the field height/width in pixels as it appears on the screen.
2. The Control Type property is used to define how code-description fields will be displayed on the screen. These fields can be displayed as one of the following (note that some of these options may not appear for certain component types):

Combo Box - A series of boxes used to select assets. Sewer Pipes and Storm Conduits have dual combo boxes.

Drop Down List - Displays the text or description field for selection.

Dual Drop Down List - Allows users to select the code or description field.

Dual Textbox - Allows users to manually enter a code, or select the code/type from a popup list.

Textbox Control - Allows users to manually enter data which is then validated by the system when the field is exited.

3. The Label property allows you to customize the text header for a field.

You can also customize field labels by clicking on a label in the Detailed Form Editor. A text box will appear allowing you to type directly on screen.

When you change a label here, it is not changed in the list of fields in the Build-A-Filter dialog on the website. Only the previous label will appear.

Frame - Work Order

- Comment From Request
- Cause**
- Assigned By
- Assigned Date
- Assigned Time
- Assigned Crew
- Supervisor
- Start Date
- Start Time
- Lead Worker
- End Date
- End Time
- Priority

Component

ComponentType	Cause
FieldsTableID	29

Data

DefaultValue	
ForceAssociation	False
LimitList	False
ReadOnly	False
Required	False

Design

ComponentWidth	80
ComponentWidthTY	350
ControlType	Dual Textbox
Label	Cause

Misc

Label	15-214
-------	--------

Proj No - Acct

Project Text

Reason

Miscellaneous

Earlier we discussed how a field's position on the form is displayed as the field is moved. For precise field positioning, you can change the values in the Location property.

Component	
ComponentType	TextField
FieldsTableID	37
Data	
DefaultValue	
ReadOnly	False
Required	False
Design	
ComponentHeight	16
ComponentWidth	180
Label	Project Text
Misc	
Location	15, 503

Data

The Data section allows you to customize the following properties. The property list will change depending on the type of field that is selected:

Data	
CarryOver	True
DefaultValue	
ForceAssociation	False
Hidden	False
HiddenTY	False
LimitList	False
Mask	10x
ReadOnly	False
Required	False

1. Carryover - True is the default. Set this to False if you do not want the user to be able to use the Carry Over button with this field.
2. Default Value - Any value selected in this field will automatically appear when a new record is created. It can be overwritten by the user before submittal unless the field is marked as read-only.

If a default value is designated in your Lucy Desktop application, it will NOT appear in the properties dialog; however, if no default value is entered here, the default value from your Lucy Desktop application will appear on the web form when it is run. Default values entered here will take precedence on the website over the ones from the Lucy Desktop application.

Any default values entered here will not affect the Lucy Desktop application.

3. Force Association - Work Flow popups such as Problem and Cause are “Force Associated” with Categories. This means that only the Problems (or Causes, etc.) that are associated with the Category will be available for selection; however, the presence of a “Show All” function allows users to choose Problems or Causes that are not associated with the Category.

If Force Association is set to True, the “Show All” option will not be available; only the forced association Categories will appear.

If Force Association is set to False, the “Show All” option will be available only for users who have been granted the “Show All Enabled” permission in Security.exe.

- The “Show All” option is only available if the Control Type is set to “Dual Textbox”.
- If a Category does not have Problems, Causes, etc. associated with it, or if a Problem identifies a default Supervisor who is not also associated with the Category, users without “Show Enabled” permissions will be unable to complete the web form if the Problem, Cause, or Supervisor field is required. These associations and defaults are established in the Lucy Desktop application, *Work Flow Setup* modules.
- We recommend that you thoroughly test all forms before implementing their use.

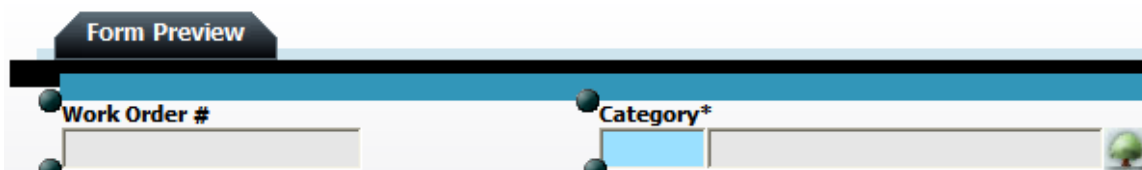
4. Hidden - If this is set to True, users will not be able to see the field in the form.
5. HiddenTY - If this is set to True, users will not be able to see the Type portion of a code/type popup but will be able to continue seeing the code portion
6. Mask - This provides the administrator with an understanding of what type of data can be entered into the field. This data cannot be edited here and is read-only.
7. Read Only - If this is set to True, users will not be able to enter data in the field.
8. Required - If this is set to True, users must enter information in the field in order to submit the form.

In Work Order forms, the Required property for the “Category” field will default to True. All other fields’ Required properties will default to False.

If you make a field required on the web form it will not affect the Lucy Desktop application; however, if a field is required in the Desktop application it will be forced onto the form by the Admin UI and will also be required on the web.

Required fields will be identified with an asterisk (*) and a different background color.

An error message will be displayed if users attempt to submit a form without data in these required fields.



The image shows a preview of a web form. At the top, there is a dark blue header with the text "Form Preview" in white. Below the header, there are two input fields. The first field is labeled "Work Order #" and has a light blue background. The second field is labeled "Category*" and also has a light blue background. The asterisk on "Category*" indicates it is a required field. To the right of the "Category*" field, there is a small green circular icon with a white tree inside.

In the example above, the Category field is required.

9. Limit List - When this is set to True, the *Limit List* button will be enabled, allowing you to select the specific pick list items available to users on the web. To use the limit list, complete the following steps:

Add a field that can be limited to the form.
Examples include Problem, Category,
Affected Asset, etc.

In the Properties grid, click on the Limit List
property and select *True*. The Limit List
button will be enabled.

Click on the Limit List button to access the Limit
List form. The Limit List selection grid will
display the code and description for each
item available. You can highlight one or
multiple selections in the left-hand grid and
add them to the right-hand grid using the
arrows in the center of the form. The items
you add to the Limit List will be the only
ones available for selection to end-users
when running the form on the web.

Save your changes.

Data	
DefaultValue	
Hidden	False
LimitList	True
ReadOnly	False
Required	False

Design	
ComponentWidth	50
ComponentWidthTY	200
ControlType	Dual Textbox co
Label	Category

Misc	
Location	294, 0

LimitList
When true, the category selected must be from the list defined for this form.

Limit List


Limit List Collection	
CodeValue	TypeValue
STSLNSRPR	SL - Install Repair
STSLMNT	SL - Maintenanc...
STSLMSC	SL - Miscellaneous
STSLNC	SL - Night Check
STSLPKINTC	Night Check PKID
STSLPNT	SL - Painting
STSLREM	SL - Removal
STSLSLDIR	SL - Light Shield I...
STSSW00	Residential Swee...
STTLM00	Street Light Maint...
SWRCOL	SWR - Collections

Save Cancel

Added Limit List	
STSLPKINTC	Night Check PKID
STSLPNT	SL - Painting
STSLREM	SL - Removal

Adding Fields to the Form

You can select specific fields from those available in the Lucy Desktop application to add to the Detailed Form Editor. Remember, fields that are required by the Lucy Desktop application will be forced onto the form.

1. To add fields to the Detailed Form Editor, click the  button on the toolbar at the top of the form. The list of available fields will appear.

These fields differ depending on which program, module, and component you chose in the Form Manager.

If you have changed the default field names in your Lucy Desktop application, your custom names will appear in this list.

2. To select fields, click on the field names in the list.

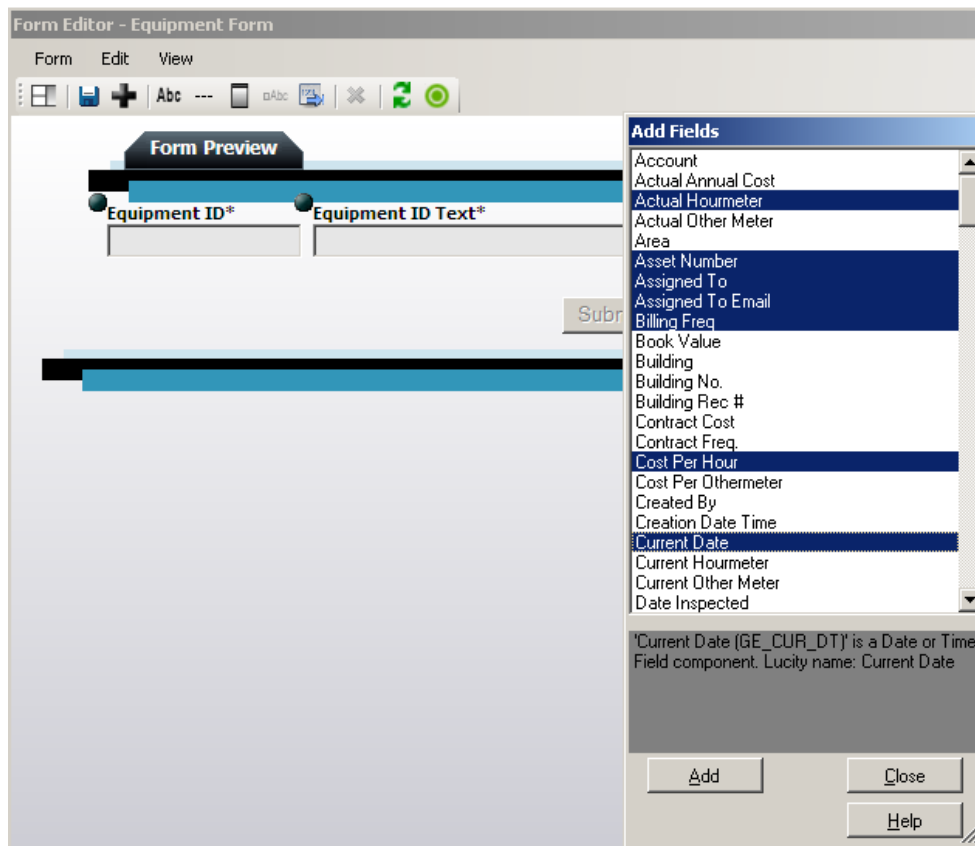
You can choose as many or as few fields as you wish to be included on your custom form; however, each individual field can only be added once per form.


As you highlight each field in the list, a brief description will appear at the bottom of the dialog. This description displays the field name, component type, and default Lucy caption.

3. Click the *OK* button to close the list of fields and add the selected fields to the form.

When you click the toolbar button again to add additional fields, only fields not currently added to the form will appear in the list.

4. Alternatively, click the *Cancel* button to close the list of fields without making any changes to the form.



5. The system will place fields on the form in the order in which you selected them in the Add Fields dialog. Remember, you can easily change the arrangement of fields on the form by clicking on the handle  beside each field and dragging it with your mouse.
6. The tab order for fields in the Forms is automatically assigned by the system in a left-to-right, top-to-bottom manner. Note that this automatic tab order takes into consideration the placement of fields within frame, meaning that users can tab through all of the fields in one frame before the tab order shifts to a second frame. If you'd like to manually select the order in which users can tab through the fields on screen, complete the following steps:

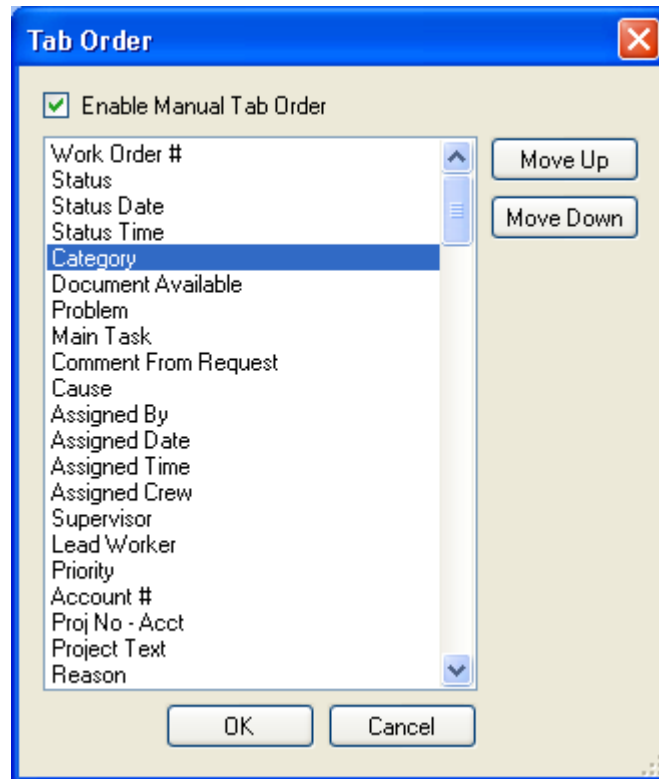
Select **Edit>>Tab Order** from the menu at the top of the Detailed Form Editor.

The following dialog will appear. It lists all fields currently included on the form.

Select the “Enable Manual Tab Order” checkbox.

Highlight individual fields in the list and click the *Move Up* or *Move Down* buttons to change the tab order.

Click *OK* when you are finished making your changes.



Notes: _____

Adding Special Items

The Detailed Form Editor Toolbar allows you to add additional features to customize your form's look and feel.



Label or Instructions - This button adds a label to the form, allowing you to add text or notes directly to the form.

When you click this button, an item with the words “Change My Text” will be added to the Detailed Form Editor.


Click on “Change My Text” to access a text box. This allows you to type your custom label or instructions directly on the form.





Dividers - This button adds a horizontal line that visually breaks up the form.



Frames - This button adds a frame to the form. This allows you to group similar fields.

You can change the size of your frame by placing your mouse over the triangular image  at the lower-right corner of the frame. Your cursor shape will change allowing you to resize the frame.

Place fields inside the frame by using each field's handle  to drag and drop them inside the frame's borders.

When you use the frame's handle  to change its location, all fields with handles contained inside the frame's borders will be moved along with the frame. Frames can be placed anywhere on the form; the form size will adjust automatically to accommodate frame placement.



Behavior Modifiers - This buttons adds a “Remember Me” or “Use Requestor's Address” checkbox to the Request Submittal forms.

To indicate which behavior item should appear on the form, access the Form Details window. Use the drop down list beside the Behavior Item component to select one of the two options:

Save Requestor Cookie - This places the “Remember Me” checkbox on the form, saving the user's typed name, address, and contact information for future use.

Use Requestor Address - This places the “Use Requestor's Address” checkbox on the form, allowing users to carry the requestor address over to the location address fields.

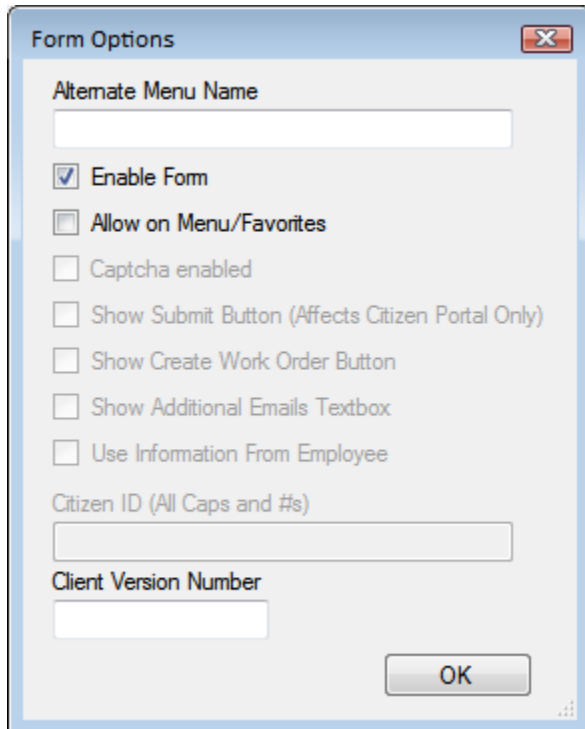


File Upload - This button adds a file upload field to the form. The fields only work on Request Forms and allow requesters to attach a file to their request. The file is then uploaded to the server and linked to the request.

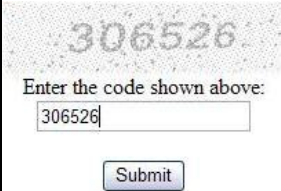
Notes: _____

Form Options

To access the form options, select **Form > Options** from the menu at the top of the Detailed Form Editor. The available options are defined below.

A screenshot of a 'Form Options' dialog box. It has a title bar with a close button. Inside, there is a text field for 'Alternate Menu Name'. Below it are several checkboxes: 'Enable Form' (checked), 'Allow on Menu/Favorites' (unchecked), 'Captcha enabled' (unchecked), 'Show Submit Button (Affects Citizen Portal Only)' (unchecked), 'Show Create Work Order Button' (unchecked), 'Show Additional Emails Textbox' (unchecked), and 'Use Information From Employee' (unchecked). At the bottom, there are two more text fields: 'Citizen ID (All Caps and #s)' and 'Client Version Number'. An 'OK' button is at the bottom right.

Option	Description
Alternate Menu Name	When a Form is created a unique name is required. By default, that name appears at the top of the form, on the menu, and on the website. If the form should have a different name or alias, add that here. If this field is filled in only the Alternate Menu Name will be seen by the end-users.
Enable Form	This checkbox makes the form accessible to users in the web app. All forms, whether they represent parent or child records, will need to be enabled to be used on the web. <ul style="list-style-type: none">Note: This is a very important step. If the form is not enabled, it will be unavailable for use in the web app.
Allow on Menu/Favorites	Mark this box to make the form available for use on internal menus. Note that this checkbox is only available on certain types of forms. Typically, these are parent records (like Work Orders, Requests, or Inventory forms). Child records will not be added to menus (i.e. Work Order Resources, Fleet Components, etc.). <ul style="list-style-type: none">Note: This is a very important step. If this box is not checked, the form will not be available to add to a menu.

	<p>Follow the link for additional information on adding forms to menus.</p>
Captcha enabled	<p>Captcha is a way to reduce some of the spam requests that might otherwise be submitted through a web form. Checking this box adds a code similar to the following to the request web page. Users will be required to type the code prior to submitting their request.</p>  <p>The screenshot shows a captcha image with the code '306526'. Below the image, it says 'Enter the code shown above:' followed by a text input field containing '306526' and a 'Submit' button.</p>
Show Submit Button	<p>This box allows administrators whether or not the Submit button will appear on a web citizen form. Marking this box causes the button to appear. This usually needs to be checked.</p>
Show Create Work Order Button	<p>This adds a Create Work Order button to internal request forms. This allows users to enter a request, then save and create a work order quickly.</p>
Show Additional Emails Textbox	<p>This provides additional email address fields to web citizen forms so that a requester can have the request create email sent to more than one email address.</p>
Use Information From Employee	<p>Checking this option causes the form to pull information from the employee's Lucy employee record (Work > Work Flow Setup > Employees) to populate fields when they are filling out a request. This works for internally submitted requests.</p>
Citizen ID	<p>The Citizen ID makes forms accessible to the Web Citizen product. This field is used to link an external site to a form. In addition, this can be used over an intranet site for an agency's users that do not have a Lucy login ID.</p> <p>Enter a unique, alphanumeric ID using uppercase letters and numbers only (e.g. XYZ123, CITIZEN1). Do not use any symbols (i.e. *, #, %).</p> <p>The ID will then be used in an entry page from an external, non-web site. You'll need to include a string similar to the following:</p> <p><"http://<servername>/LucyWebCitizen/?FUI=XYZ123">Click here to report a problem </p> <ul style="list-style-type: none"> o <i>Note: For public web forms to be used by citizens, several security permissions will need to be enabled. Consult the Group Assignment topic for additional information. To make public web forms available to internal users, mark the Allow on Menu checkbox. Administrators can then add the form to menus and assign groups to it. To make this only accessible to public citizens, do not check Allow to Menu.</i>

Assigning Groups to Forms

In order for views and forms to be used online, you'll need to assign groups to views and forms and then assign them to menus. The *Assign Groups to Forms* option in the UI Admin allows you to rapidly assign different user groups to various forms. These groups are established in the Lucity Security.exe. You'll need to assign users to groups in the Security program in order for them to access your custom forms.

1. Click on one or multiple groups on the left-hand side of the screen. Your selections will be highlighted.

For our example, select the "Default" group.

2. Click on one or multiple forms on the right-hand side of the screen. Your selections will be highlighted.

Select the forms you just copied, i.e. "WO Complete", "Request", "Employee Request", "Fleet" and "Equipment".

3. Click the *Assign Groups to Forms* button. All highlighted groups will be assigned to the highlighted forms.

The screenshot shows the 'Assign Groups To Views/Forms' dialog box. On the left, under 'Groups', a list of user groups is shown with 'Administrator' selected. On the right, under 'Available Views/Forms', a list of views/forms is shown. Below the lists are several controls: three dropdown menus for selecting views/forms, three checkboxes for filtering the display ('Show Only Views, Not Forms' is checked), an 'Assign Groups' button, and a section for setting a default view for the selected group with a dropdown and an 'Assign default view to group' button. A 'Refresh List' button is also present at the bottom right.

As can be seen from above, you can have multiple views set up for any one specific module. One view can be assigned to many groups and one group can be assigned to many views.

The above form can do a lot. Let's first tackle the Groups side.

The list on the left displays all of the groups that have been created. You cannot create groups in this dialog. To create a group you must use the Security program.

If you select a Group and then hit the Group Properties button a new screen appears which shows you the Users Assigned to the Group (and the Group Name) and the forms that this group has access to use. You can also remove group access to any and all selected forms. Below shows an example where earlier we created the Structure Inventory - Grid Only form and assigned it to the SewerViewer group.

The 'Group Properties' window has a light blue header with the title 'Group Properties' and standard window controls. The main content area is divided into two sections. The left section, titled 'Users Assigned to Group:', shows the group name 'SewerViewer' and a list box containing the name 'Don Pinkston'. The right section, titled 'Forms this group has access to:', contains a list box with the entry 'Structure Inventory - Grid Only' highlighted in blue. Below the right list box is a button labeled 'Remove access to selected form(s)'.

The Group Assigned to Views/Forms works the other way. Taking the list that is displayed in the Available Views/Forms grid, it displays all of the records in this list. Then the administrator can select any of the forms to see what groups have rights to use the view/form.

The 'Groups Assigned To View/Forms' window has a light blue header with the title 'Groups Assigned To View/Forms' and standard window controls. The main content area is divided into two sections. The left section, titled 'Assigned Views/Forms', contains a list box with the following items: 'Eval Work Order Complete' (highlighted in blue), 'EVAL3 GBAMS WOGF Review Fleet', 'EVAL4 GBAMS WOGF Review Equipment', and 'Work Orders - Full'. The right section, titled 'Assigned Groups', contains a list box with the following items: 'Administrator', 'GIS Administrator', 'GIS User', and 'PublicWebGroup'.

The middle section of the Assign Groups to Views/Forms allows the user to change what information is displayed in the Available Views/Forms grid as well Assigning Views/Forms to Groups.

- None Checked - Shows all Views and Forms for the selected module component.
- Show Only Views, Not Forms - Only shows the Views for the selected module component. This can be also used in conjunction with Show Program Views/Forms
- Show All Views/Forms - Shows every View and Form in your system
- Show Program Views/Forms - Shows all Views and Forms for the program - in the above example, everything within the Work Order Manager Program. If the Show Only Views, Not Forms is also checked, then it will show all Views but no Forms for the program

The Select default view for selected Group is something that only appears for Work Orders (a few other modules have been added starting with 16R2). This allows you to select a default work order view for each group. To do this you first select the group for which you want to assign a default View. Then, using the drop-down arrow which shows you the available views, you select the appropriate view and then select the then you select the View

Finally after the view is selected, hit the “Assign default view to group” button to assign that view as that groups default view. You can tell if any group has a default view by highlighting it. If the edit box shows “Group for Defaulting Rules...” then no view has been defined for that group.

Menus

The Navigation *Menu* option allows you to define root menus for use on your internal website. You can then include your custom forms under each menu item. Since the menus are fully dynamic, you can define the names of the menu items, the order in which menu root items are displayed, and the order of forms within each menu group. For ease of use, we've provided arrows to move your menu items.

Note that users will only be able to see the menu items for which they have group permissions. Timesheet forms will also appear in this list.

Create New Menu Group

The menu groups appear on the left-hand side of the Menu Manager. To add a menu group listing, complete the steps below:

1. Click the *Start Edit* button.
2. Click the *Create New Menu Group* button at the bottom of the screen. A "New Group" listing will appear in the left-hand grid.
3. Right click on the "New Group" listing and type a new name. This name will appear on your website's menu.

Here, we've created a new menu group called "Lucity".

4. Click *Save* when you are finished making your changes.

Menu Manager

Menus

- Eval Forms
 - Eval Equipment
 - Eval Fleet
 - Eval Request Complete
 - Eval Work Order Complete
 - Eval Basic Citizen Request
- Lucity

Click on a menu to rename. Views/Forms on menus cannot be renamed.

Bridge
Street Bridges (227)
Street Bridges (227)

☒ Show All Views/Forms
☐ Show Program Views/Forms
☐ Show only Timesheet forms

Views/Forms not assigned to menus

- Building Assessment
- Building Asset Inspection
- Building Asset Inventory
- Building Inspection
- Building Inventory
- Building Observations
- Building Warranty
- Door Inspection
- Door Inventory
- Equipment
- Equipment Component Library
- Equipment Inspections
- Equipment Threshold Library
- Equipment Warranty
- EVAL3 GBAMS Fleet Component Warranty General
- EVAL3 GBAMS Fleet Fueling General Link
- EVAL3 GBAMS Fleet Request
- EVAL3 GBAMS Fleet SubComponent Warranty
- EVAL3 GBAMS Fleet Travel Log General Link
- EVAL3 GBAMS Fleet Warranty General Link
- EVAL3 GBAMS PM/Template for Assets
- EVAL3 GBAMS WOGF Review Fleet
- EVAL4 GBAMS Equipment Inspection General Link
- EVAL4 GBAMS Equipment Readings General Link

*Names italicized in RED are disabled

Refresh List

Delete Menu Group Create New Menu Group Start Edit Save Cancel

Assigning Forms to Menu Group

The forms appear on the right-hand side of the Menu Manager. There are four ways that views/forms can be displayed on the left hand side:

1. If none of the checkboxes in the middle are checked on, then the program will display the Views/Forms for the Program selected
2. If the Show All Views/Forms is checked on, then the program will list all programs and forms that have been defined in the system. This is why it is very important to use a good naming

convention when saving your views and forms. If this is selected, it must be unselected before using the other two check boxes.

3. If the Show Program Views/Forms is checked on then it will show the views/forms for child records. These do not show typically in the menu since they need to be connected to a parent record.
4. If the Show Only Timesheet Forms checkbox is selected, then only timesheet forms will be displayed.

Note that form names in red italics are disabled. In order to add forms to the menu, you must select the *Enable Forms* checkbox on Detailed Form Editor (the forms that you copied in the above examples will already be enabled).

1. Click the *Start Edit* button.
2. First, highlight a menu group in the left-hand grid. Forms will be added to the highlighted menu group only.

We've highlighted the "Lucity" group.

3. Next, highlight a form in the right-hand grid and use the left arrow button to move the form to the selected menu group.
4. Repeat this process for all of the forms you'd like to add to the menu.

For this example, move the "Timesheet", "Equipment forms under your new menu group.

5. Use the up and down arrows to rearrange the forms in the menu.
6. To remove a form from the menu, highlight it and click the right arrow button
7. Click *Save* when you are finished making your changes.

The screenshot shows the 'Menu Manager' window. On the left, under 'Menus', the 'Lucity' group is selected. In the center, there are three dropdown menus: 'Work Order Manager', 'Work Orders (48)', and 'Work Order Events (18)'. Below these are three checkboxes: 'Show All Views/Forms' (checked), 'Show Program Views/Forms' (unchecked), and 'Show only Timesheet forms' (unchecked). There are also four arrow buttons for moving items. On the right, under 'Views/Forms not assigned to menus', a list of forms is shown, including 'Permit Inventory', 'Person', 'Pipe Air Testing', 'Pipe Inventory', 'Pipe Mandrel Testing', 'Plant', 'Plant Process', 'Property Tax Inventory', 'Pump Inspection', 'Pump Inventory', 'Pump Station', 'Pump Station Inspection', 'Readings', 'Roof Asset Inspection', 'Roof Asset Inventory', 'Roof Inspection', 'Roof Inventory', 'Roof Warranty', 'Room Asset Inspection', 'Room Asset Inventory', 'Room Inventory', 'Room Warranty View', 'Service Connections', and 'Service Lateral Inspection'. At the bottom, there are buttons for 'Delete Menu Group', 'Create New Menu Group', 'Start Edit', 'Save', 'Cancel', and 'Refresh List'. A note at the bottom right states: '*Names italicized in RED are disabled'.

Practice Problems

In the following pages, we've included a series of practice problems to help you set up your web forms. Follow the instructions below to enhance your understanding of the Lucy Web application.

Practice #1 - Request Submittal for Building Maintenance


1. In the Form Manager, create a Form for "Internal Building Maintenance Request" so it looks like the screen below

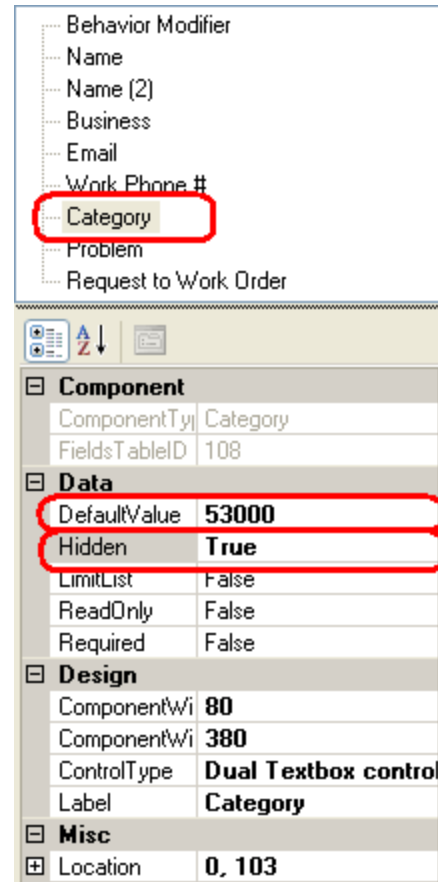
The screenshot shows a web form titled "Detailed Form Editor - Internal Building Maintenance Request". The form is displayed in a "Form Preview" mode. It includes the following fields and elements:

- ☐ Remember Me
- First Name* (text input)
- Last Name* (text input)
- Department (text input)
- Email* (text input)
- Work Phone # (text input)
- Building (text input)
- Problem (text input)
- Please Describe the Problem in some Detail (large text area)
- Submit button

Notes: _____

2. For the Category field:

Click the  button to access the Form Details.
Select the Category field in the top portion of the dialog.
Click on the Default Value property and select “53000” from the drop down list.
Click on the Hidden property and select “True” from the drop down list.



Behavior Modifier	
Name	
Name (2)	
Business	
Email	
Work Phone #	
Category	
Problem	
Request to Work Order	


Component	
ComponentType	Category
FieldsTableID	108
Data	
DefaultValue	53000
Hidden	True
LimitList	False
ReadOnly	False
Required	False
Design	
ComponentWidth	80
ComponentWidth	380
ControlType	Dual Textbox control
Label	Category
Misc	
Location	0, 103

3. Set the following properties for the Asset Rec # field:

Set the Default Type to “Facility Building”.
Set the Hidden Type to “True”.
Change the Label for Asset to “Building”.

4. Set the following properties for the Problem field:

Set the Force Association property is “True”.

Do you want to use any Scripts? The  button beside the Problem field is used to display scripts for users. Remember that script answers do not get carried over to the work order but information in the Comments field does.

5. Save and Close the form.

6. To finalize the form, complete the following steps:

Assign Groups to the Form.

Add the Form to a new Menu Group titled “Internal Requests”. Refer back to the instructions earlier in this workbook if you have any questions.

View the form on the web and add one or two records to practice using it.

Practice #2 - Internal Facility Maintenance Request

1. In the Form Manager, copy the “Internal Building Maintenance Request” form and rename it “Internal Facility Maintenance Request”. Select *Edit Now*.
2. Use the handles to move the Comment, Problem, and Building fields down.
3. Open the Form Details dialog and select “Category”. Make the following changes to the Category’s field properties:
Set the Hidden property to “False”.
Set the Limit List property to “True”.
Click on the Limit List button and select all Facility Categories:

CodeValue	TypeValue
50000	Facilities
51000	Facility Site
52000	Facility Site Asset
53000	Facility Building
54000	Facility Roof
55000	Facility Floor
56000	Facility Room
57000	Facility Door
58000	Facility Furnishing
60000	Equipment
70000	Fleet Maintenance

Added Limit List

- 51000 - Facility Site
- 52000 - Facility Site Asset
- 53000 - Facility Building
- 54000 - Facility Roof
- 55000 - Facility Floor
- 56000 - Facility Room
- 57000 - Facility Door
- 58000 - Facility Furnishing

Save Cancel

4. Select the “Asset Rec #” field and make the following changes to the field properties:
 - Clear out the Default Type.
 - Set the Hidden Type property to “False”.
 - Set the Control Type equal to “A series of comboboxes that narrow a final combobox’s asset list”.
 - Set the Facility Option equal to “Building Driven List”.
 - Change the Label for Asset to “Asset”.
5. You’ll need to move the Asset Type, Problem, and Comment fields to improve the appearance of the form. Use the handles to drag them to their new locations.
6. Save and Close the form.
7. Finalize the form.
Add Groups to the Form.
Assign the Form to the “Internal Requests” Menu Group.
8. View the form on the web and add one or two records.

Practice #3 - Internal Facility Maintenance Request 2


1. Copy “Internal Facility Maintenance Request” and rename it “Internal Facility Maintenance Request 2”. Select *Edit Now*.
2. Open the Form Details dialog and select the Asset Rec # field.
3. Change the Control Type to “Textbox control that allows manual entry. . . “
4. Save and Close the form.
5. Finalize the form.

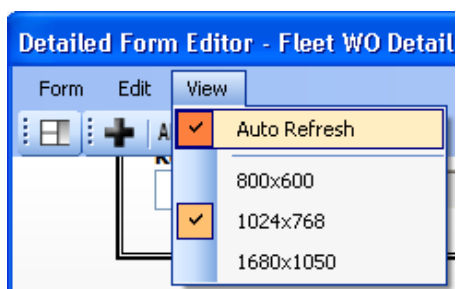
Assign Groups to the Form.

Assign the Form to the “Internal Requests” Menu Group.

6. View the form in the web and add one or two records. Notice how the method of selecting Rooms in both forms varies for the end user.

Practice #4 - Fleet WO Form

1. Copy “Work Orders - Full Form” and rename it “Fleet WO Detail”.
2. Remove the Location, Billing, and User Defined Fields (and Frames);
 - *Note: When removing multiple fields, you may find it useful to turn off the “Auto Refresh”. This option is enabled by default. When turned on, the form will refresh automatically each time a change is made. If this option is turned off, you will not see the visual impact of your form changes until you turn the Auto Refresh back on, or click the Refresh button  on the toolbar.*



3. Add the System ID 1 field onto the form
4. Use the handle to move the System ID 1 field to the header section at the top of the form.
5. Change the field label from “System ID 1” to “Vehicle”.

Click on the label in the Detailed Form Editor and type “Vehicle” in the text box.
6. Use the handles to move the Recorded and Cost Frames higher up in the form.

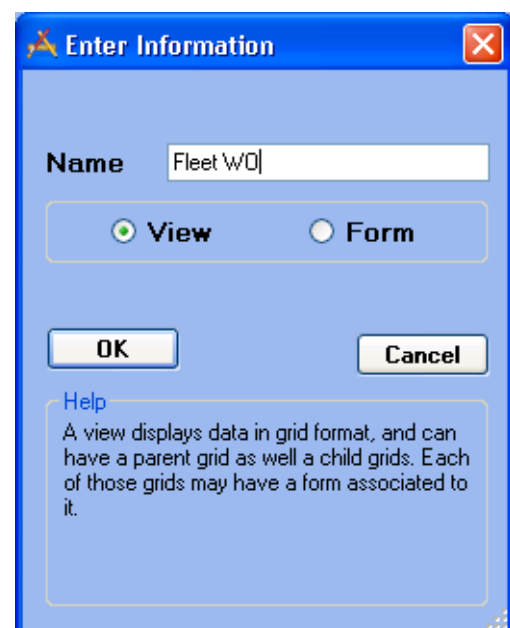
Notice that when you move a Frame, all fields included in the Frame move as well.
7. Save and Close the form.

Practice #5 - Create Fleet Asset WO Form

1. In Work Order Manager, Work Order Assets, Copy “Assets Form” and call it “Fleet WO Asset”.
2. Select the “Asset Rec #” field and open the Form Details dialog.
 - a. Set the Hidden Type “True”.
 - b. Set the Default Type to “Fleet”.
 - c. Set the field to “Required”.
 - d. Change the Label for Asset to “Fleet ID”.
 - e. Set the Control Type equal to “Textbox Control”.
3. Add the following fields:
 - a. WO Cost
 - b. Asset Comment
4. Change the Width of the Asset Comment field to 550.
5. Change the Label of the Asset Comment field to “Fleet Comment”.
6. Change the Tab Order, if desired.
7. Save and Close the form.

Practice #6 - Create New Fleet WO View

1. In the Form Manager, select the following from the drop down lists at the top of the screen:
Select Program - Work Order Manager
Select Module - Work Orders
Select Module Component - Work Orders
2. Click the *New* button at the bottom of the screen.
In the Form Name field, type “Fleet WO”.
Select the “View” radio button.
Click *OK*.



3. In the View Builder, create the following:

In Step 1, select the “Work Order Module” grid type.

In Step 2, create a new Grid called “Fleet WOs”.

The screenshot shows the 'Grid Builder' window with the following configuration:

- Grid Name:** Fleet WOs
- Grid Type:** Work Orders
- Page Size:** 10
- Description:** (Empty text area)
- Column Editor:**
 - Available Columns:** A list of fields including 'Bill Cust Last Name', 'Bill Cust Name', 'Bill Cust No', 'Bill Cust Phone', 'Bill Cust State', 'Bill Cust Zip', 'Bill E-mail', 'Bill Fax #', 'Billed', 'Billing Amount', 'Billing Processed', 'Billing Required', 'Category', 'Category Text', 'Cause', 'Cause Text', 'Classification', 'Classification Text', and 'Comment to Crew'.
 - Selected Columns:** A list containing 'Work Order #', 'System ID 1', 'Main Task Text', 'Problem Text', 'Reason Text', 'Supervisor Text', 'Lead Worker Text', 'Status', 'Status Text', 'Status Date', 'Start Date', 'End Date', and 'Comment From Request'.
 - Properties:**
 - Display:** Header: Fleet ID
 - Field:** RelatedField: WO_LINK1
 - Header:** Text to display at the top of the column in the grid.
- Help:** Mouse over a control to see its description.
- Offline Mobile:** (Unchecked checkbox)
- Buttons:** Manage Buttons, Help, Save, Cancel.

4. Click on the *Edit Grid* button to access the Grid Builder. Then, make the following changes:

From the Available Columns grid, select “System ID 1”. Use the right arrow button to add it to the Selected Columns list.

Highlight “System ID 1” in the Selected Columns list and use the up arrow button to move it directly underneath “Work Order #”.

Change the “System ID 1” Header to “Fleet ID” and change the names of the “Text” fields.

Save your changes.

Notes: _____

5. In the View Builder, select the “Work Order Assets” grid type.

In Step 1, move the Work Order Assets grid directly underneath Work Order Module.

In Step 2, create a new Grid for “Fleet WO Asset” and add the following columns and then save it

The screenshot shows the 'Grid Builder' window with the following configuration:

- Grid Name:** Fleet WOs
- Grid Type:** Work Order Assets
- Caption:** (empty)
- Page Size:** 10
- Description:** (empty text area)
- Column Editor:**
 - Available Columns:** Asset Comment, Asset Rec #, Asset Type, Asset Type Text, Category, Category Text, Completion Time, Created By, Creation Date Time, Defect, Defect Description, Defect Distance, Defect Estimated GPM, Defect Loc 2, Defect Loc 2 Description, Defect Loc Description, Defect Location, Defect Observed GPM, Defect Rating.
 - Selected Columns:** System ID 1, Desc 1, Desc 2, Odometer, Hourmeter, Completion Date, General Comment.
- Properties:**
 - Display:** Header Fleet ID, MobileWidth.
 - Field:** RelatedField AS_LINK1.
 - Header:** Text to display at the top of the column in the grid.
- Help:** Mouse over a control to see its description.
- Offline Mobile:** ☐
- Buttons:** Manage Buttons, Help, Save, Cancel.

In Step 3, select the “Fleet WO Asset” form.

6. Select the “Work Order Checklist” grid type.

In Step 1, move the Checklist grid directly underneath the Work Order Asset grid.

In Step 2, select the “Checklist”.

In Step 3, select the “Checklist Form”.

7. Select the “Work Order Tasks” grid type.

In Step 1, move the Tasks grid directly underneath the Work Order Checklist grid.

In Step 2, select the “WO Tasks”.

In Step 3, select the “WO Tasks Form”.

8. Click on the plus sign [+] beside the Work Order Tasks grid.

Select all of the resources you’d like to add to your View.

Select the corresponding Grids and Forms for each resource type.

Organize each item up or down according to your preference.

9. Your View should resemble the following when you are finished.

The screenshot shows the 'View Builder' window with the following configuration:

- View Name:** Fleet WO
- Alternate View Name:** (empty)
- Step 1: Select a Grid Type:** A tree view on the left with the following items checked:
 - Work Orders
 - Work Order Assets
 - Work Order Checklists
 - Work Order Tasks
 - Work Order Resources - Materials
 - Work Order Resources - EmployeesOther items in the tree include: Work Order Resources - Fluids, Work Order Resources - Equipment, Work Order Resources - Contractors, Work Order Assets, Work Order Locations, Work Order Events, Work Order Comments, Work Order Resulting Tasks, Daily Inspections, Work Order Tracking, Work Orders, Work Requests, and PM/Work Templates.
- Step 2: Select a Grid:** A dropdown menu showing 'Fleet WOs' with 'New Grid' and 'Edit Grid' buttons.
- Step 3: Select a Form for Grid (optional):** A dropdown menu showing 'Fleet WO Detail' with 'New Form', 'Edit Form', and 'Preview' buttons.
- Help:** A text box with the instruction 'Mouse over a control to see its description.'
- Offline Mobile:** An unchecked checkbox.
- This is the default view for the Work Orders:** An unchecked checkbox.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right.

10. Save your changes.

Notes: _____

Additional Practice

For additional hands-on practice, build the following forms:

1. Request Complete (for review)

2. Request Submittal

Employee Fleet Requests - This should be a simple Detail Submittal form allowing employees to enter maintenance requests for their vehicles.

Employee Building Maintenance Requests - This should be a simple Detail Submittal form allowing employees to enter building or room maintenance requests.

Constituent Requests Taken by Employees - This should be a simple Detail Submittal form allowing call center employees to record phone requests from citizens.

Constituent Requests Made by Constituents - These should be a simple Detail Submittal forms that are pushed out to your external web site for citizen use.

- General Request - A very basic request containing contact information and a comment field.
- Tree Maintenance Request - This could be the same as the General Request form but with the addition of scripts based on the problem selected and Problem Limit Lists specific to Trees.
- Parks Requests - This could be the same as the General Request but with the addition of Problem Limit Lists specific to Parks.
- Solid Waste Pickup Request - This could be the same as the General Request but with the addition of Problem Limit Lists specific to Solid Waste.
- Pothole Issues - This could be the same as the General Request but with the addition of Problem Limit Lists specific to Pavements.

3. Work Order Complete (for review)

4. Lead Worker Forms (no costs displayed, limited information)

Fleet Maintenance

Sewer Maintenance

Solid Waste Pickups

Facility Maintenance

5. Supervisor Forms (more information available)

6. Equipment Complete (for review)

7. Create a new form from scratch - WO for Fleet (View)

Add a new Grid - Fleet WO

Add a new Form - Fleet WO

Notes: _____

Converting to Lucity Web from the Desktop

In order to gain more experience in moving users from the Desktop into the web, several scenarios below have been developed. These examples do not include the web map.

Water Supervisors

- 105 - Corey Cola
- 266 - Edwin Gene

Water Lead Workers

- 47 - Paul Black
- 41 - Sergio Sigoa
- 17 - Earl Green - Add in Security

Fleet Supervisors - Add Permissions

- 6 - Phillip Alexander
- 359 - Waylon Pierce

Fleet Lead Workers - Add Permissions

- 184 - Art Stern
- 111 - Kelly Carlson
- 43 - Tom Jones

Director - Tom Knight

Security

1. Add Permissions to yourself so that you can make changes to Dashboards
2. Add Earl Green into Security and change his login ID in Employees
3. Add permissions to Fleet Lead Workers and then Fleet Supervisors
4. Add Permissions to Director Tom Knight

Dashboard

1. Create Dashboard for Water Lead Workers that are shared
2. Open WOs where they are the lead worker (logged in user ID)

Show

1. Create Individual Dashboard for Paul Black
 - a. Hydrants that need inspection
 - b. Next week and all previous

Show

1. Modify Shared Dashboard - Open Requests

Views/Forms

1. Create WO View/form for Water Lead Workers
2. Attach view/forms to Water Lead Worker group
3. Create Water Hydrant View/form (import from Lucy)
4. Create Water Hydrant Inspection View/form (import from Lucy)
5. Log in as Paul Black. Show Dashboard, then launch the Hydrant records needing inspection, then create the work order for all hydrants, then create an inspection record for each, then filling in the inspection record and then closing the work order.

Setup Dashboards for Supervisors

1. Shared Open WO & Requests
2. Open WOs
3. Open Requests
4. Shared Water Assets
5. Shared QA Tab
6. Shared Summary Report Tab

Review Fontana Summary Report (Power Point)

Create New Views and Forms for Supervisors that have more data

Link new Views and Forms to Water Supervisor Group

Show how Timesheet works and setup Timesheet on the fly

Setup some Internal and External Request Submit Forms

Setup Dashboards, Views and Forms for Fleet Maintenance

Hydrant Inventory - No Filter

Hydrant Rec # 1 Hydrant Number 544 Valve Rec # 28

Address 754 S 135TH PL Valve Number 2782

Attributes Location Construction Flow Tests Inspections/Associations Flushing WD/PM/Req Custom Comments

Manufacturer	1	Clow Medallion	Operating Status	2	Good
Model Number	1212		Dir to Open	2	Counter Clockwise
Serial Number	651		Turns to Open	4.00	
Hydrant Type	1	Dry-Barrel	Traffic Model	1	Yes
Connection Type	1	MJ	Freeze Proof	1	Yes
Nozzles	4	3.00 4.00 4.00	Color Code	2	Yellow (500-1000gpm)
Inlet Size	6.00	Hyd Valve Size 3.00	Feed Length	4.00	Fixed Asset ID
Pressure Zone	1	Pressure Zone 1	Feed Diam	6.00	
System	2	Distribution	Feed Material	1	Ductile Iron
Owner	1	City	Project Number	W45-078	
Managed By			Pipe Number	123423	
Installation Date	08/11/1990		Main Dia	11.00	Active
Account Number	65465		Flow Rate (gpm)		Operable Flag

Record 1 of 209 View Mode Ready...

Attributes Location Construction Flow Tests Inspections/Associations Flushing WD/PM/Req Custom Comments

Facility 1 Your Town

General Location northwest corner of city

Hydrant Field Ties

Field tie text

start

Map Number Alt Map Number In Easement GIS SubType Text

Elevation (ft) 4.28

X Coordinate 757222.38582

Y Coordinate 846029.55413

GPS Located GPS Date 06/11/2007 GPS Source 1 Water Department Extensions

Attributes	Location	Construction	Flow Tests	Inspections/Associations	Flushing	WO/PM/Req	Custom	Comments														
Overall Cond	2	Good	Inspection Date	05/31/2007	Next Insp Date	05/31/2009																
Inspections <table border="1"> <thead> <tr> <th>Inspection Date</th> <th>Inspected By</th> <th>Overall Cond Text</th> <th>Operating Cond T</th> </tr> </thead> <tbody> <tr> <td>05/31/2007</td> <td>Mike</td> <td>Good</td> <td>Good</td> </tr> </tbody> </table>				Inspection Date	Inspected By	Overall Cond Text	Operating Cond T	05/31/2007	Mike	Good	Good	Associations <table border="1"> <thead> <tr> <th>Asset Text</th> <th>Record No</th> <th>Unique ID</th> </tr> </thead> <tbody> <tr> <td>Flow Meter Lo...</td> <td>111</td> <td>00110</td> </tr> </tbody> </table>					Asset Text	Record No	Unique ID	Flow Meter Lo...	111	00110
Inspection Date	Inspected By	Overall Cond Text	Operating Cond T																			
05/31/2007	Mike	Good	Good																			
Asset Text	Record No	Unique ID																				
Flow Meter Lo...	111	00110																				

Hydrant Inspection - Unnamed Filter Set

Hydrant Rec # 1 Inspection Date 05/31/2007 : AM Most Recent Inspection ☐

Hydrant Number 544 Address 754 S 135TH PL

Inspection Custom Comments

Inspected By	Mike	Stem Condition	2 Good
Inspection By		Packing Cond	2 Good
Overall Cond	2 Good	Valve Cond	2 Good
Operating Cond	2 Good	Valve Seat Cond	2 Good
Damage Type	0 N/A	Nozzle Condition	1 Excellent
Paint Condition	2 Good	Grade to Nozzle	
Drain Condition	2 Good	Hydrant Flushed	<input type="checkbox"/>
Oper Nut Cond	2 Good	Time Flushed (m)	
Cap Chain Cond	2 Good	Next Insp Date	05/31/2009
Cap Condition	2 Good		

Record 1 of 1 View Mode Ready...

Work Orders - No Filter

Work Order # 2014-00004 Category 21200 Sewer Pipe

Status 2 New Work Order Problem

Status Date 07/26/2014 02:07 PM Main Task Ww/CPPTV CCTV Inspections Mains

WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments

Asset 1000 113495 - 1424 S PROJECT DR 113497 - E LESLIE CT

Location

Cause

Assigned Crew

Supervisor 87 SHIELA KAMDON

Lead Worker 137 DAVID BEAR

Priority

Account #

Proj No - Acct

Project Text

Reason

Assigned By

Assigned Date / / : AM

Start Date / / : AM

End Date / / : AM

Master Project ID

Name

Comment From Request

Override Notifications Problem ☐

Overdue ☐

Lead Worker ☐

Task ☐

Supervisor ☐

Hard Lock WO ☐

Record 3237 of 3237 View Mode Ready...

WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Comments

Department 41070200 Waste Water Collection

Division

Sub-Division

Area

Sub-Area

Owner

Location

Classification

Comment to Crew

Work Order Location

No	Address	Address2	Loc X Coord.	Loc Y Coord.

Seq/	Category Text	System ID 1	Completion Date	Desc 1	Desc 2	Odometer	Hourmeter
1	Sewer Pipe	1000		113495 - 1424 S PROJ...	113497 - E LESLIE CT		
2	Sewer Pipe	1001		113486 - 1564 E VALE...	127237 - 2741 E VALE...		
3	Sewer Pipe	1002		113487 - 165 E VALEN...	113486 - 1564 E VALE...		
4	Sewer Pipe	1003		113493 - S TATUM LN	113494 - S QUINN CT		

Associated Tasks

Task Text	Cost	Task Start Date	Task End Date	Status Text	Task Supervisor Text

No	Checklist Item	Completed	Condition Text	Completion Date	Completo

Events

Event Text /	Event Date	Event Time	Note

Work Order Resources

WORK TASK: CCTV Inspections Mains Processed by Financials ☐

Resource Type: UPC Code:

Resource:

Alt Description:

Department:

Class:

Group No:

Unit of Measure:

Default Unit Cost:

Account #:

Proj No - Acct:

User 1:

User 2:

User 3:

User 4 Date:

Res Start Date: : AM

Res End Date: : AM

Cost Markup:

	Norm	Regular	OT	Total	Estimated
Units	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Time Cost	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Unit Cost	<input type="text" value="0.000"/>	<input type="text" value="0.000"/>	<input type="text" value="0.000"/>	<input type="text"/>	<input type="text"/>
Total Cost	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Cost Markup

Order	Percentage	Flat Rate	Calculate On Text
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Odometer: Hour Meter: Other Meter:

Ending Amount: Starting Amount: Amount Used:

Press F9 for pop-up selection Record 0 of 0 Add Mode Ready...

WD | Location | Assets | List/Events | Tasks/Res | Routing | Costs | Billing | Related | Requests/Track | Links | Custom 1 | Custom 2 | Comments

Projected Compl: : AM Lock ☐

Repair:

Subcontractor:

Profit Center:

Quantity: Lock ☐

Unit of Measure: Linear Feet

Unit Cost:

WO Hours:

	Actual	Estimated	Difference
WO Duration	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Labor Hours	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Labor Costs	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Material Cost	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Fluid Cost	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Equipment Costs	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Contractor Costs	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Misc. Costs	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Total Cost	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Use Task Info ☒ ☒