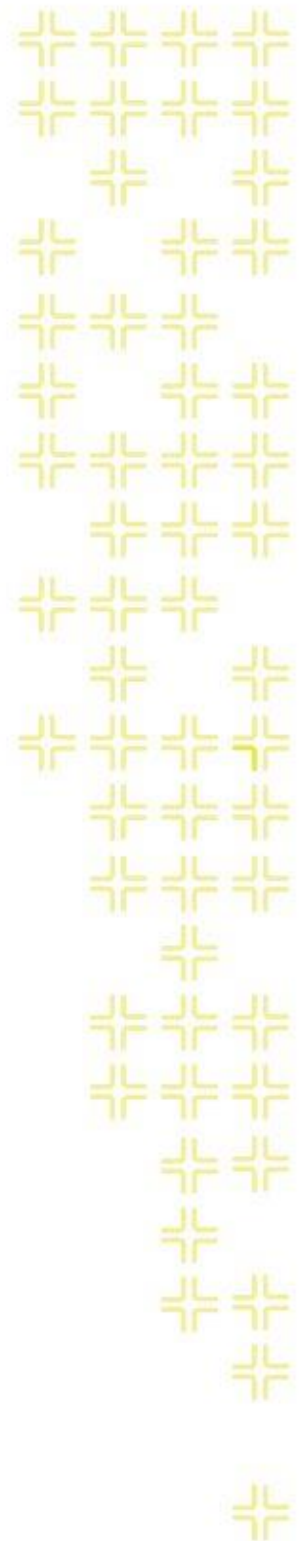




TRAINING GUIDE

Desktop

Basic Functionality



Lucity - Basic Desktop Functionality

In this workbook, we will introduce you to the basic layout and functionality of the *Lucity*™ desktop system. This includes menus, form layout, fields, toolbars, adding/editing/deleting records, finding records and filtering records, attaching documents, and running reports. We will also introduce you to Asset and Work Management topics.

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Introduction to Asset Management

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

System Inventory

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

Field Inspection

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

Introduction to Work Management

The *Lucity*™ suite also offers you a comprehensive solution for Work Management. The *Lucity Work* suite of modules allows you to track customer requests, create work orders, establish a preventative maintenance plan, set priorities, provide timetables, track system rehabilitation, manage work projects, and perform budget forecasting.

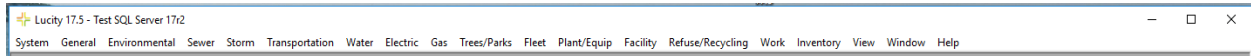
Work Orders

The Work Orders module allows you to schedule and track work tasks, personnel, equipment, and material usage. Three versions of work orders are offered on the desktop: Standard, Lite, and Daily Work. All three modules integrate with the same data set. The Standard module is the most comprehensive of the three, offering additional functions such as costing, billing, and tracking. Work Order Lite contains only the basic functions of the Work Order Standard module. This allows for quick and easy data entry. The Daily Work module is the most basic of the three, designed for quick data entry without your fingers ever having to leave the keyboard.

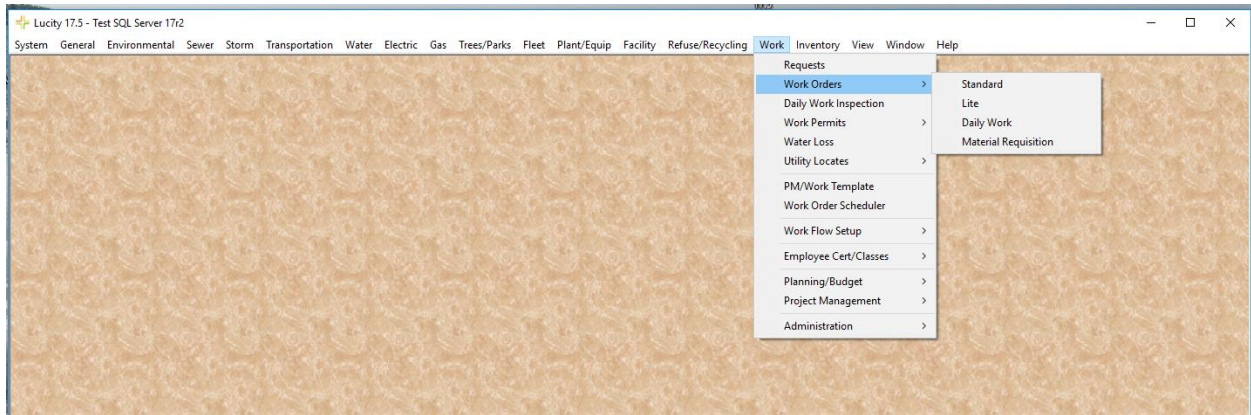
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Menus

The menu bar will help you navigate through the *Lucity™* desktop suite. After logging into the system, you'll see a menu bar at the top of the screen:



The menu items correspond to individual groupings in the software, system functions, and the help guide. Each main menu item contains a drop down menu listing each available module. For example, under the Work main menu item, you can see a list of all modules that pertain to performing *Work*.



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

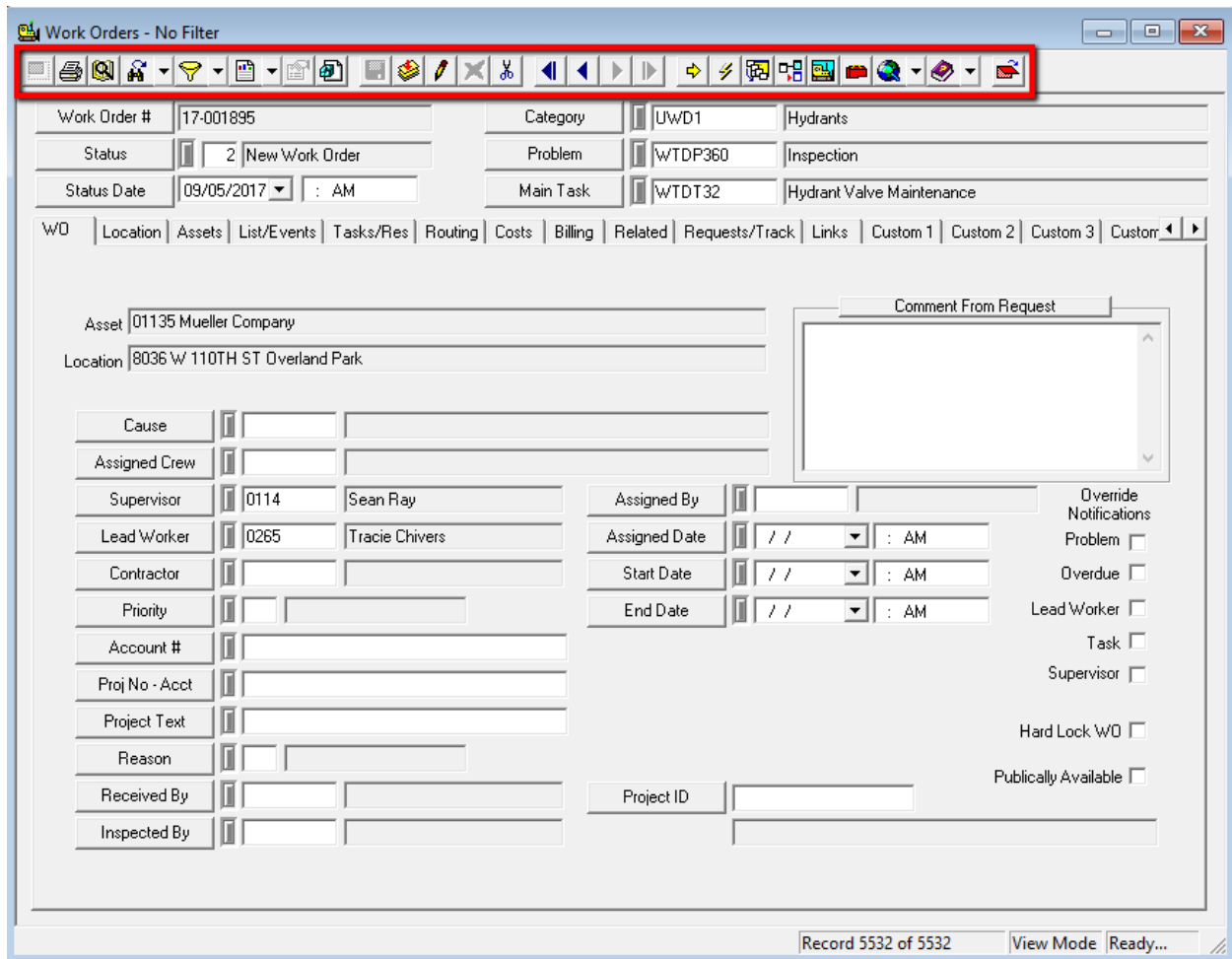
Form Layout

Each application in the *Lucity™* desktop suite has a window designed specifically for the information recorded in that module. Although each module has unique features, the components that make up each window are the same. This helps make the desktop easy to use. The basic components of each window are the Module Toolbar, Header Data, Fields, Field Captions, Attribute Tabs, and the Status Bar. We'll discuss each of these components in the following pages using the *Work Orders* module as a guide.

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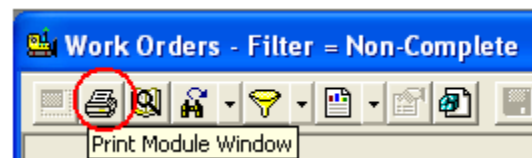
Module Toolbar

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





















This toolbar contains buttons that perform or access a variety of standard functions. Place your cursor over an icon to see the name/function of that particular toolbar button. For example, if you place your cursor over the icon that resembles a printer, the words "Print Module Window" appear.




Since each module's toolbar may vary, there may be instances where buttons appear to be "grayed out". These buttons are inaccessible for that module; nothing will happen when they are clicked.



Toolbar Buttons

These buttons will appear when they are applicable in a given module.



Button	Name	Description
	Resize	Resizes the module window.
	Print Module Window	Captures the screen image and sends it to your designated printer.
	Locate	Quickly locates specific records.
	Browse	Browses records, produces quick custom reports, and exports information.
	Filter	Opens the Filter window.
	Reports	Views, prints, or adds/deletes reports to or from the list of pre-defined reports.
	Open Document	Views a list of documents, videos, and images attached to the record.
	Document Control	Adds or deletes documents, videos, and images to or from the record.
	Save	Saves your changes.
	Cancel	Cancels any changes you have made since the last save.
	Add Record	Adds a new record to the module.
	Edit	Edits the current record.
	Delete	Deletes the current record.
	First, Previous, Next, Last	Navigates through the data set.
	Go To	Views a specific record number.
	Refresh	Re-queries the data set and returns your screen to the first record in the filtered set (i.e., it runs the filter again).
	Relationship	Displays other modules related to the current record.
	Subsets	Creates and saves a set of filtered records.
	Work Order	Generates a Work Order for the current record.
	Work Request	Generates a Work Request for the current record.
	PM/Template	Generates a PM/Template for the current record.
	Toolkit	Opens the Toolkit dialog box.
	Show In Map	Opens the map, zooms in, and highlights the selected feature.
	Recalculate	Updates all calculations in the module.

	Custom Library Function	Only appears in the Work Request module, and only works for those clients for which it was installed. Used in the "Search for Customer" process in Requests when accessing a third-party table containing the requestor or requestor address.
	Help	Opens the Lucity Help Guide to the appropriate topic chapter.
	Close	Closes the module.




Adding, Editing, and Deleting Records

The steps for adding a new record, editing the current record, or deleting a record are the same throughout the modules:


To Add a New Record:

1. Click  on the module toolbar to add a record. You are now in *Add Mode*.
2. Enter any Header data or required data.
3. Enter any additional information in the Attribute Tabs.
4. Click  to save the record.

To Edit the Current Record:

1. Click  on the module toolbar to edit the current record. You are now in *Edit Mode*.
2. Make the necessary changes.
3. Click  to save your changes.
4. Click  to exit *Edit Mode* or cancel your changes prior to a save.

To Delete a Record:

1. Locate the record you wish to delete.
2. Click  to delete the record.
3. You will receive a prompt asking you to confirm the deletion. Take care when deleting records as this action cannot be undone.

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

Header Data

At the top of the module window you will see header data. This is visible regardless of which tab is displayed below. It is important to enter data in the header for each new record because this information defines or distinguishes each record using unique IDs.

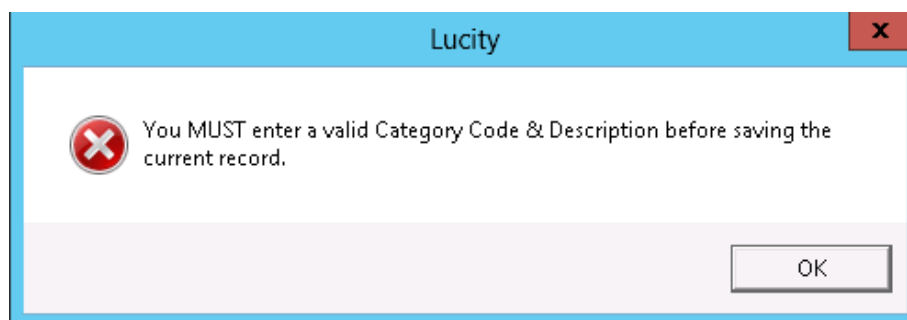
The screenshot shows the 'Work Orders - No Filter' window. A red box highlights the header data section at the top, which includes the following fields:

Work Order #	17-001895	Category	UWD1	Hydrants
Status	2 New Work Order	Problem	WTDP360	Inspection
Status Date	09/05/2017 : AM	Main Task	WTD32	Hydrant Valve Maintenance

Below the header, there are tabs for 'W/O', 'Location', 'Assets', 'List/Events', 'Tasks/Res', 'Routing', 'Costs', 'Billing', 'Related', 'Requests/Track', 'Links', 'Custom 1', 'Custom 2', 'Custom 3', and 'Custom 4'. The 'W/O' tab is selected. The main area contains various input fields for asset information (Asset: 01135 Mueller Company, Location: 8036 W 110TH ST Overland Park), cause, assigned crew, supervisor (Sean Ray), lead worker (Tracie Chivers), contractor, priority, account #, project text, reason, received by, and inspected by. There are also date fields for assigned date, start date, and end date, and checkboxes for override notifications, problem, overdue, lead worker, task, supervisor, hard lock W/O, and publically available. A 'Comment From Request' text area is also present.

Header data varies with each module. In most modules the header data consists of an ID number or some other number that identifies the asset represented in that record. Many modules have fields required by the system in the header, meaning a record cannot be saved until data is entered in these fields. You will receive an error message if you attempt to save the record without that required information.

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



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

Tabs

Each module has various tabs to organize and store similar types of data. You can see on the screen below that the *Work Orders* module has tabs for WO (Work Order attribute data), Location, Assets, List/Events, Tasks/Resources, Routing, Costs, Billing, Related, Requests/Tracking, Links, Custom1, Custom2, Custom3, Custom4, and Comments. Although tabs vary by module, each module typically has Custom and Comments tabs. To navigate through the record, click on the tab names. The display will change accordingly.

The screenshot shows the 'Work Orders - No Filter' window. At the top, there is a toolbar with various icons. Below the toolbar, the main data entry area is divided into several sections. The top section contains fields for 'Work Order #', 'Status', 'Status Date', 'Category', 'Problem', and 'Main Task'. The 'Work Order #' is 17-001895, 'Status' is 2 New Work Order, 'Status Date' is 09/05/2017, 'Category' is UWD1 Hydrants, 'Problem' is WTD360 Inspection, and 'Main Task' is WTD32 Hydrant Valve Maintenance. Below these fields is a tabbed interface with the following tabs: WO, Location, Assets, List/Events, Tasks/Res, Routing, Costs, Billing, Related, Requests/Track, Links, Custom 1, Custom 2, Custom 3, and Custom 4. The 'WO' tab is currently selected. The main area below the tabs is divided into two columns. The left column contains fields for 'Asset', 'Location', 'Cause', 'Assigned Crew', 'Supervisor', 'Lead Worker', 'Contractor', 'Priority', 'Account #', 'Proj No - Acct', 'Project Text', 'Reason', 'Received By', and 'Inspected By'. The right column contains fields for 'Assigned By', 'Assigned Date', 'Start Date', 'End Date', 'Override Notifications', 'Problem', 'Overdue', 'Lead Worker', 'Task', 'Supervisor', 'Hard Lock WO', and 'Publically Available'. The 'Asset' field is 01135 Mueller Company, and the 'Location' field is 8036 W 110TH ST Overland Park. The 'Assigned By' field is empty, and the 'Assigned Date' is /. The 'Start Date' and 'End Date' are also /. The 'Override Notifications' checkbox is checked. The 'Problem' checkbox is checked. The 'Overdue' checkbox is checked. The 'Lead Worker' checkbox is checked. The 'Task' checkbox is checked. The 'Supervisor' checkbox is checked. The 'Hard Lock WO' checkbox is checked. The 'Publically Available' checkbox is checked. The 'Project ID' field is empty. At the bottom of the window, the status bar shows 'Record 5532 of 5532', 'View Mode', and 'Ready...'.


Status Bar

The status bar, located at the bottom of the module window, performs a variety of functions. The status bar allows you to see whether the current record is in View Mode, Add Mode, or Edit Mode. Another piece of information shown is the record number you are viewing out of how many records are in the current filter set.

When you add new records on the desktop, a filter is automatically created with just your new records. When you are creating new records, you may not want to see all of the existing records. So, the status bar will default to a count of the records created by you on the current day. The example below shows that when you are in Add mode and are in the middle of adding a new Work Order, the status bar shows the count of "Record 0 of 4". The current record hasn't yet been saved while you are in Add mode, so the count says you are on Record 0 out of 4 records created by you on the that day:

After the record is saved, the record count on the status bar then changes to Record 5 of 5, indicating that the new record was added to your filterset of new records added that day:

To view all existing Work Orders including our newly created Work Order, click the Filter button drop

down list  and select **Reset Filter**. The record count will now display the total number of Work Orders:

On the desktop, newly added records generally get put on the end of the existing data. When you reset the filter, you will be taken back to the first record.

The status bar may also display any messages regarding available Hot Keys or other special functions. The status bar above in Add Mode tells you that when your cursor is in the Problem field, by pressing the <F9> hot key, a pop-up list of choices will appear or by pressing the <F7> key, a filtered pop-up list will appear. Finally, the status bar alerts you when the system is busy performing another function. In these examples, the status bar reads “Ready”, meaning the system is not performing any other function at this time.

Grids

Each module on the desktop may have one or more grids that appear throughout the tabs. Many of these grids indicate special relationships. Several grids also contain actions that can be performed on the data inside the grids.

Grid Relationships

The grids inside a module can indicate special relationships. In Work Orders, there is a grid that displays the Assets that are included in the Work Order. The assets are considered “children” of the current Work Order. The Work Order would be considered a “parent” of the assets. Some of the grids also contain “linked” records that are related to the current record through special relationships.

Work Orders - No Filter

Work Order # 17-001895 Category UW1 Hydrants

Status 2 New Work Order Problem WTDP360 Inspection

Status Date 09/05/2017 : AM Main Task WTDT32 Hydrant Valve Maintenance

W/O Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Custom 3 Custom 4

Seq	Category Text	System ID 1	Completion Date	Completion Time	Desc 1	Desc 2	Odometer	H
1	Hydrants	01135			Mueller Company			

Associated Tasks

Task Text	Cost	Task Start Date	Task End Date	Status Text	Task Supervisor Text
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Record 5532 of 5535 View Mode Ready...

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

Work Orders - No Filter

Work Order # 17-001895 Category UWd1 Hydrants

Status 2 New Work Order Problem WTDP360 Inspection

Status Date 09/05/2017 : AM Main Task WTDT32 Hydrant Valve Maintenance

WO Location Assets List/Events Tasks/Res Routing Costs Billing Related Requests/Track Links Custom 1 Custom 2 Custom 3 Custom 4

Work Tasks

No.	Task Text	Task Start Date	Task End Date	Status Text	UOM	Calc'd Unit Cost	#
1	Hydrant Valve Maintenance					0.00	
2	Flow Testing						

Resources

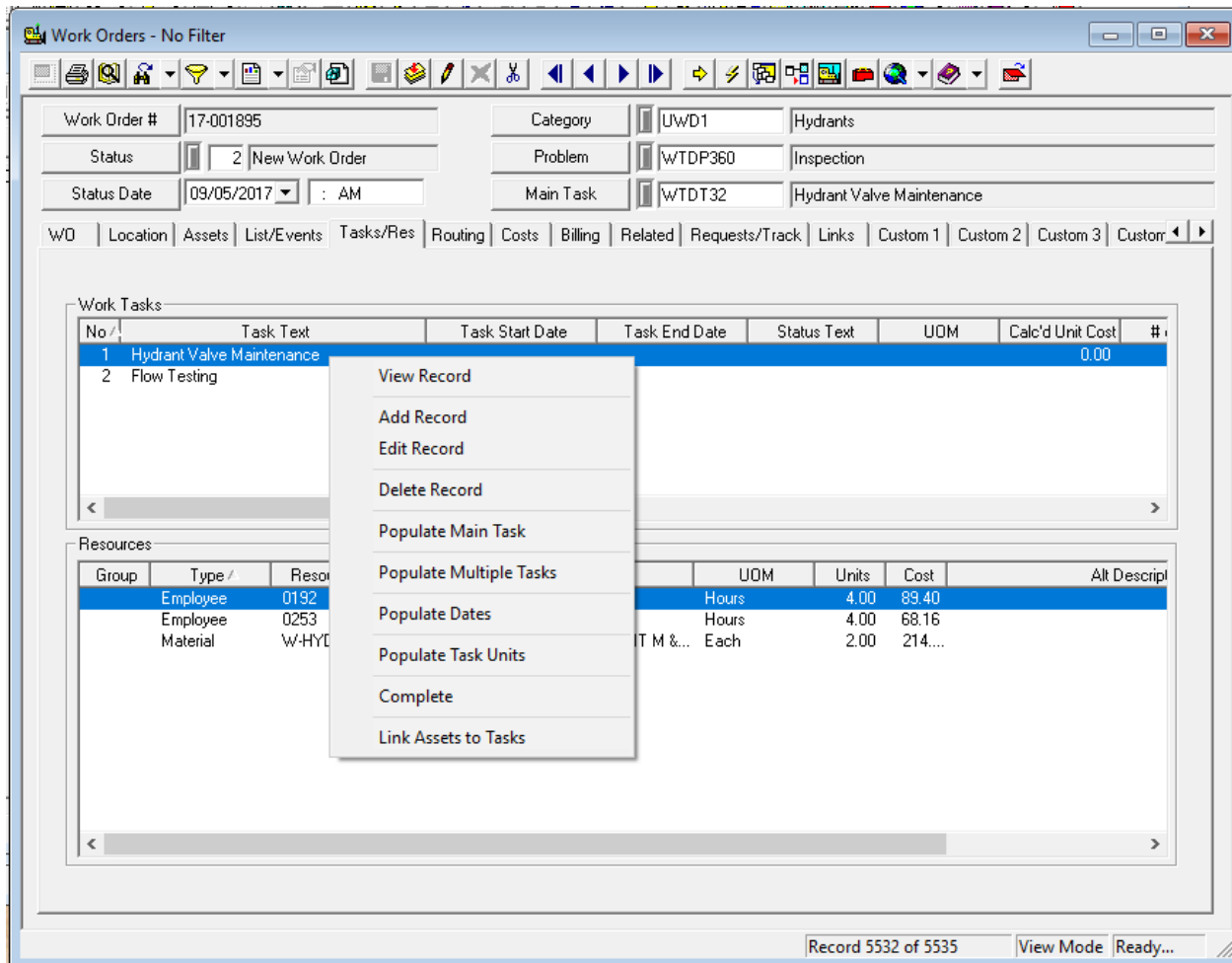
Group	Type	Resource	Resource Text	UOM	Units	Cost	Alt Descript
Employee	0192	Mariella Serna		Hours	4.00	89.40	
Employee	0253	Claude Kurz		Hours	4.00	68.16	
Material	W-HYD-KI...	HYDRANT DRAIN RING, REPAIR KIT M &...		Each	2.00	214....	

Record 5532 of 5535 View Mode Ready...

NOTES: _____

Grid Functions

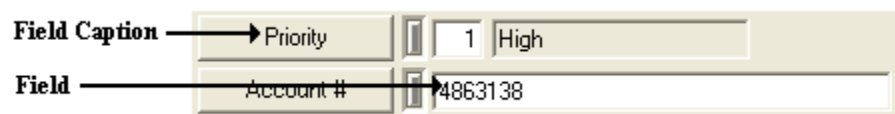
In addition, the records in the grids may have actions that can be completed on them. To see if there are actions that can be performed, highlight the record in the grid and click the right mouse button. Any functions that are available for that record will appear. These are also known as “Right-Click” or “Right-Mouse” functions. For example, the “Right-Click” functions for the “Hydrant Valve Maintenance” task are displayed here:



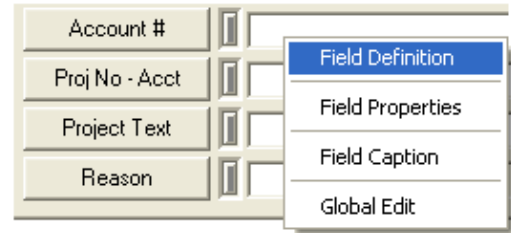
Fields and Field Captions

Each record contains various field types and field captions. Fields are the locations on the window where data is entered. Each field is preceded by a field caption button.

Field captions define what information should be entered into a particular field. For example, the first field caption below is titled “Priority”. A priority of 1 - High has been entered in the corresponding field.



All fields have a field definition window and a field properties window. You need to be in View Mode in order to see the Field Properties, Field Caption, and Global Edit functions. You can access these functions by placing your cursor over a field and using **Ctrl + Right Click**.

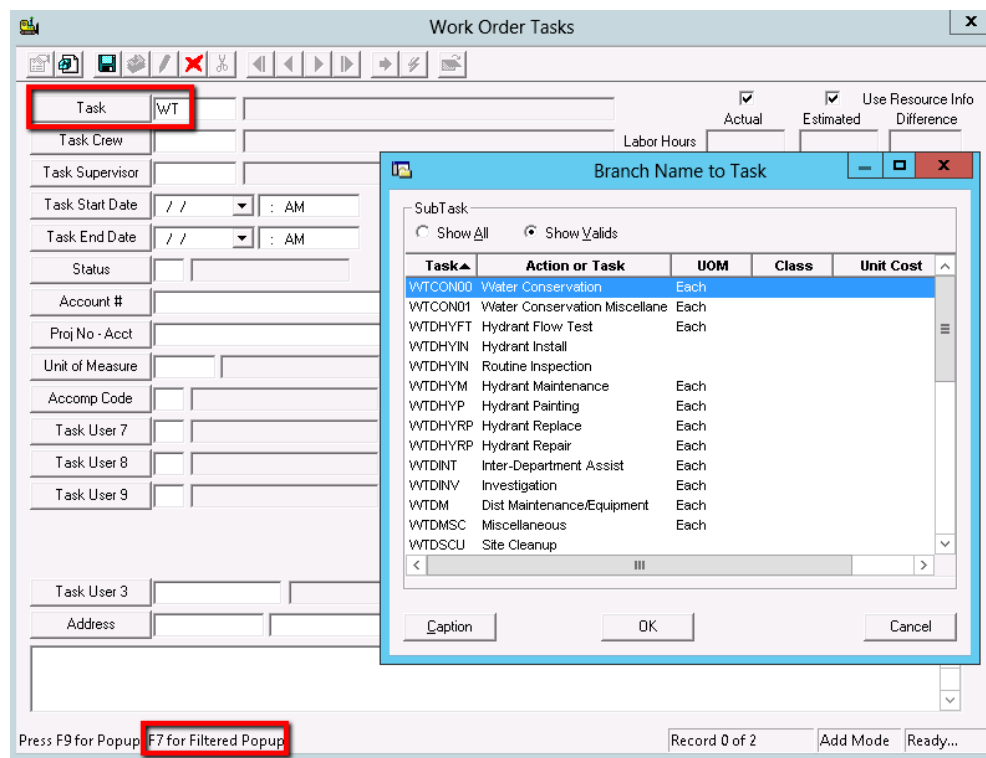


These windows allow you to view or change the field definition, change the decimal point placeholders in a numeric field, make field entry required or restricted, etc..

Some fields are editable and others are static (meaning you cannot modify them). Editable fields have a white background while static fields have a gray background. A few special fields have a Global Edit option. This option allows you to mass-populate a field in your filtered record set without having to update each record individually.

Field Instructions

Some fields may have special function keys that are applicable to that field. These functions enable a user to perform a task more quickly. A short instruction would display on the status bar when the cursor is inside the field. For example, in the Work Order Task module, there are instructions for the Task field. If a user would like to filter the list, they could first enter the characters to filter by and click F7. In the example below, the Task list is filtered by those that start with 'WT':



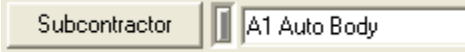
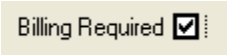
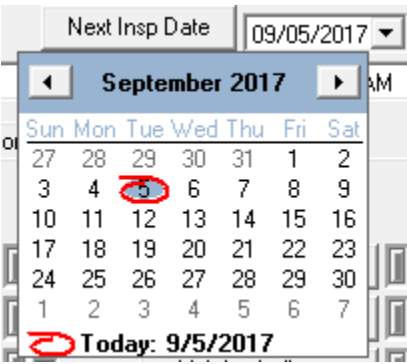
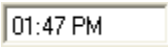


Here are some examples of fields that use the F5 key to copy a value from one field to another:

- In Requests, from the Phone field to Home Phone, Phone 1 or 2, or Work Phone.
- In Work Orders, from the Start Date to the End Date.
- In Work Orders, from the Total Cost to the Billing Amount.

Field Types

There are different types of fields available for data entry. For example, some fields require numerical data while others require text. A brief definition and example of each field type is listed in the table below.

Code-Description or “Picklist” Fields 	<p>These fields require you to enter a code in the first box. The code description will then appear in the grayed-out box. For example, a code might be 1=High, 2=Medium, 3=Low, etc. The number 1 would go in the first field and the description “High” would automatically appear in the second field. The codes and descriptions are created and then accessed through a picklist.</p>
Numeric Fields 	<p>Numeric fields only allow a number to be entered. Depending on the field, the numbers may or may not contain decimals. Most numeric fields are right-justified.</p>
Text Fields 	<p>Text fields allow both letters and numbers to be entered. Most text fields are left-justified.</p>
Logical (checkbox) Fields 	<p>Logical fields allow you to enter a checkmark in the box if you wish to select that field.</p>
Date Fields 	<p>Date fields can be manually or automatically entered. To manually enter a date, use the mm/dd/yyyy format. Use the arrow keys in place of the slash. To automatically enter the current date, hit the space bar while your cursor is in the field. You can also use the drop-down menu to select the date from a pop-up calendar. You can then use the arrow keys at the top of the calendar to select a different month or year.</p>
Time Fields 	<p>Time fields can be manually or automatically entered. To manually enter a time, use the arrow keys in place of the colon. To automatically enter the current time, hit the space bar. To identify AM or PM, enter an “A” or “P” after the time or use the up or down arrow keys on your keyboard.</p>
Comment Fields	<p>Comment fields allow users to enter multiple lines of text in paragraph form. These comment fields have copy/paste abilities and carriage returns using Ctrl + Enter.</p>


Tools

Locate



The locate feature allows you to quickly find specific records within the current record set. The following example is from the *Work Orders* module; however these same steps apply in all other modules. You can use this feature if you know specific identification information about the record you are looking for, or if you'd like to search through a list of the records available.

To access the locate feature, click  on the module toolbar.

 **Locate** — □ ×


Work Order # to Locate: Open Cancel

	<i>Work Order #</i>	<i>Status Text</i>	<i>Category Text</i>	<i>Main Task Text</i>
3833	17-000193	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3834	17-000194	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3835	17-000195	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3836	17-000196	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3837	17-000197	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3838	17-000198	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3839	17-000199	New Work Order	Tomahawk Creek Electrical	365 DAY / 6001 TO 10000 HOUR SERVICE
3840	17-000200	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3841	17-000201	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3842	17-000202	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3843	17-000203	New Work Order	Middle Basin Structures	365 DAY / 6001 TO 10000 HOUR SERVICE
3844	17-000204	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3845	17-000205	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3846	17-000206	New Work Order	Tomahawk Creek Electrical	365 DAY / 6001 TO 10000 HOUR SERVICE
3847	17-000207	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3848	17-000208	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3849	17-000209	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3850	17-000210	New Work Order	Tomahawk Creek Equipme	365 DAY / 6001 TO 10000 HOUR SERVICE
3851	17-000211	New Work Order	Middle Basin Electrical/Instr	365 DAY / 6001 TO 10000 HOUR SERVICE
3852	17-000212	New Work Order	Tomahawk Creek Electrical	365 DAY / 6001 TO 10000 HOUR SERVICE

Your search is organized by the fields at the top of the window. Click on the column header for the field you want to search in. The selected header text will be shown in red italics and the records in the dialog will be sorted by that field. In the example above, the “Work Order #” header is selected.

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You can search for a record by scrolling through the list shown or by using a dynamic search. In a dynamic search you will use the text box at the top of the window to enter the information you are looking for. In this example, we've entered Work Order #17-000020 and the system has found the corresponding record. The record found by the system will be highlighted in red.


 Locate — □ ×

Work Order # to Locate: Open Cancel

	<i>Work Order #</i>	<i>Status Text</i>	<i>Category Text</i>	<i>Main Task Text</i>
3642	17-000002	New Work Order	Gravity Mains	TV Inspection
3643	17-000003	New Work Order	Gravity Mains	TV Inspection
3644	17-000004	New Work Order	Gravity Mains	TV Inspection
3645	17-000005	New Work Order	Catch Basin	Cleaning
3646	17-000006	New Work Order	Catch Basin	Cleaning
3647	17-000007	New Work Order	Catch Basin	Cleaning
3648	17-000008	New Work Order	Catch Basin	Cleaning
3649	17-000009	New Work Order	Tomahawk Creek Structur	FIVE YEAR EQUIPMENT SERVICE
3650	17-000010	New Work Order	Tomahawk Creek Buildings	FIVE YEAR EQUIPMENT SERVICE
3651	17-000011	New Work Order	Tomahawk Creek Electrical	FIVE YEAR EQUIPMENT SERVICE
3652	17-000012	New Work Order	Tomahawk Creek Equipme	FIVE YEAR EQUIPMENT SERVICE
3653	17-000013	New Work Order	Tomahawk Creek Equipme	FIVE YEAR EQUIPMENT SERVICE
3654	17-000014	New Work Order	Tomahawk Creek Equipme	FIVE YEAR EQUIPMENT SERVICE
3655	17-000015	New Work Order	Fleet Maintenance	Preventative Service
3656	17-000016	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3657	17-000017	New Work Order	Middle Basin Electrical/Instr	365 DAY / 6001 TO 10000 HOUR SERVICE
3658	17-000018	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3659	17-000019	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE
3660	17-000020	New Work Order	Middle Basin Electrical/Instr	365 DAY / 6001 TO 10000 HOUR SERVICE
3661	17-000021	New Work Order	Middle Basin Equipment	365 DAY / 6001 TO 10000 HOUR SERVICE

< >

The system will also search for partial text. In the example above, when “17” is typed, the red line will jump to the first record beginning with “17”. As you continue typing, the highlighted line will move to match your search item. This function is performed automatically.

Once you have found the record you are searching for, click , double click, or hit <Enter> on the keyboard. The module will open to the highlighted record.

NOTES: _____



Filtering Records



A filter helps you narrow your search for a specific record or set of records. For instance, you may be trying to manage your Work Orders, but find that you have to sort through other people's records as well. A Filter will allow you to work with only your desired records.

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

There are three ways to open the filter window:

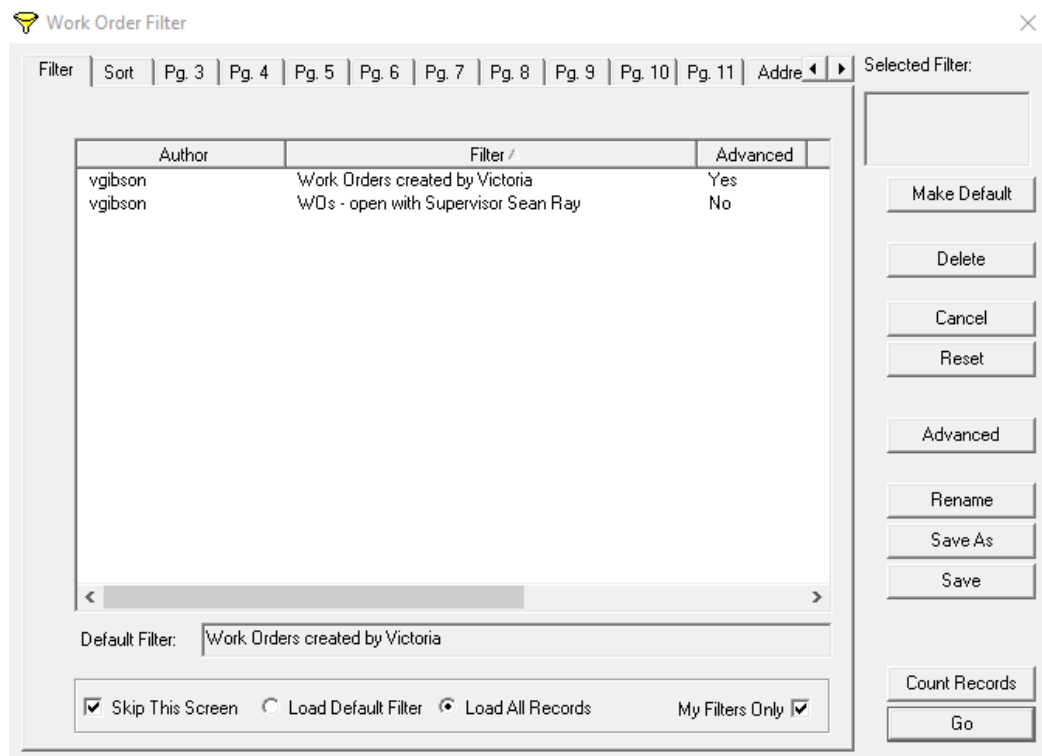
1. When you open a module for the first time you will be prompted to open or define a filter before any records are displayed.
2. After a module is already opened, you can select or create a filter by clicking the filter button in the toolbar .
3. In the Filter drop-down list , you can select the "Filter" option.

Using the Filter Window

The filter window has several tabs with different functions.

Filter

The "Filter" option is the first tab in the Filter window. This tab contains a list of saved filters and will default to showing only your filters. If this is your first time using the module, no filters will be saved under your ID but you can search for all filters by removing the check in the "My Filters Only" box.





Sort

The “Sort” option is the second tab on the Filter window. You can set up a sort order of your filtered data in ascending or descending order based on the field(s) you select. This Sort function is not a filter but rather affects the display of the filtered data. This step is optional so it may be skipped.



To use the sort function, complete the following steps:

1. Highlight a field in the “Selectable” list. You can use the selection buttons at the bottom of this list to change the order in which the fields appear. “Standard Order” reflects the order in which the fields appear in the module itself. If you’d prefer, you can change it to “Alphabetical” order.
2. Click the right arrow  and the field appears in the “Selected” list. You can select as many fields as you like from the list. Use  to remove an item from the list.
3. Click the “Ascending” or “Descending” buttons under the “Selected” list to indicate how you want the records sorted.
4. Click “Reset” to clear all “Selected” fields and start over.

Filter Tabs

The remaining tabs in the Filter window (Pg. 3, Pg. 4, Address, etc.) contain all of the filterable fields. You will use these tabs to set up your filter criteria.

The screenshot shows the 'Work Order Filter' window. At the top, there is a tab bar with tabs labeled 'Filter', 'Sort', 'Pg. 3', 'Pg. 4', 'Pg. 5', 'Pg. 6', 'Pg. 7', 'Pg. 8', 'Pg. 9', 'Pg. 10', 'Address', and '2nd'. The 'Pg. 3' tab is selected and circled in red. Below the tabs, the main area contains several filterable fields, each with a dropdown menu and a search box. The fields are: 'Work Order #' (dropdown: <None>), 'Status' (dropdown: <None>), 'Status Text' (dropdown: <None>), 'Status Date' (dropdown: <None>), 'Status Time' (dropdown: <None>), 'Category' (dropdown: <None>), 'Category Text' (dropdown: <None>), and 'Problem' (dropdown: <None>). On the right side of the window, there is a 'Selected Filter:' section with a 'No Filter' button, and a series of buttons: 'Make Default', 'Delete', 'Cancel', 'Reset', 'Advanced', 'Rename', 'Save As', 'Save', 'Count Records', and 'Go'.

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

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Day-to-Day Work Order Filters

To help you better understand how to use filters in your daily work, we'll go over some specific examples. Supervisors are responsible for managing their own work. That means generating Work Orders from public Work Requests, creating Work Orders for new jobs, looking through Work Orders on a daily basis to schedule and manage work, editing Work Orders to keep them current, and closing Work Orders when the job is completed. All Work Orders in the Lucity system are shared, so you can view other supervisor's Work Orders as well as your own. Work Orders that are completed and closed are not erased from the system. Over time, you'll have more and more Work Orders.

In order to manage the records, you can use a filter to see only the records currently assigned to you. The following example shows you how to set a filter with a supervisor's name.

Filter with 'Equals' (Supervisor Name)

The screenshot shows the 'Work Order Filter' dialog box. It has a tabbed interface with 'Filter' selected. The 'Supervisor' field is highlighted with a red box. The 'Supervisor Text' dropdown menu is open, showing options: '<None>', 'equal', 'not equal', 'like', 'in list', and 'not in list'. A red arrow points to the 'equal' option. The right side of the dialog has buttons: 'Make Default', 'Delete', 'Cancel', 'Reset', 'Advanced', 'Rename', 'Save As', 'Save', 'Count Records', and 'Go'.

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


The close-up shows the 'Supervisor Text' dropdown menu with 'equal' selected. The list of names is open, showing: Sam McReynolds, Sean Ray (highlighted), and Tamesha Galindo.

Start by finding the Supervisor Text field. The *Work Order* filter has this field on Pg. 5. Note that ‘Supervisor’ refers to the employee’s CODE, while ‘Supervisor Text’ refers to the NAME. This is the case for all Code/Type fields (white + grey field). Set the drop down list next to Supervisor Text to ‘equal’. When you do, the Supervisors will be listed in the box to the right. Use the up and down arrow to scroll to the entry you want (or, you can click on one entry, hit the first letter, “S”, and you’ll jump to the “S’s” in the list).

Find your choice and click it. It will be highlighted in blue. This reads like a formula: Supervisor Text = Sean Ray.

Count Records

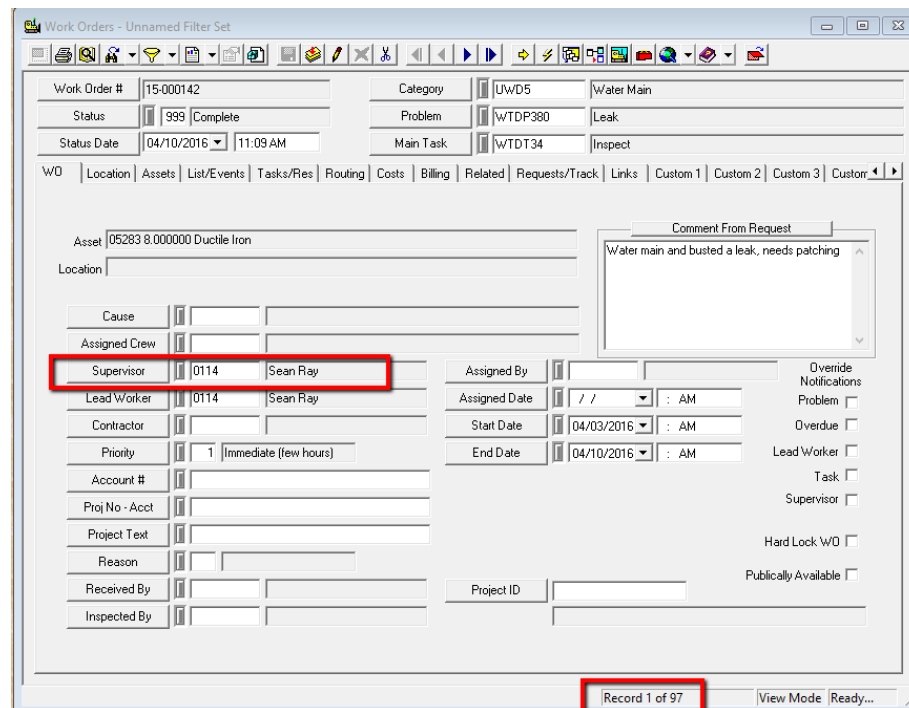
Count Records Click the Count Records button to get a count on the records that will be filtered out. Here we can see that 97 (out of the total 5540) Work Order records have Sean Ray named as Supervisor.




A small dialog box titled "Record Count" with a close button (X) in the top right corner. It contains two text input fields: "Total number of records:" with the value "5540" and "Number of records after current filter:" with the value "97". Below the fields is an "OK" button.

Go to Records

Go Now click “Go” on the filter screen and the 97 Work Orders with Sean Ray named as a supervisor will be shown. You can see the record count at the bottom of the screen (in the status bar).



A screenshot of the "Work Orders - Unnamed Filter Set" window. The window has a toolbar at the top and a main area with various fields and tabs. The "Supervisor" field is highlighted with a red box, showing the value "0114" and "Sean Ray". The "Assigned Crew" field is also highlighted with a red box, showing the value "0114" and "Sean Ray". The "Status" field is set to "Complete". The "Asset" field is set to "05283 8.000000 Ductile Iron". The "Location" field is empty. The "Cause" field is empty. The "Priority" field is set to "1" and "Immediate (few hours)". The "Account #" field is empty. The "Proj No - Acct" field is empty. The "Project Text" field is empty. The "Reason" field is empty. The "Received By" field is empty. The "Inspected By" field is empty. The "Assigned By" field is empty. The "Assigned Date" field is set to "04/03/2016" and "AM". The "Start Date" field is set to "04/03/2016" and "AM". The "End Date" field is set to "04/10/2016" and "AM". The "Override Notifications" checkbox is checked. The "Problem" checkbox is checked. The "Overdue" checkbox is checked. The "Lead Worker" checkbox is checked. The "Task" checkbox is checked. The "Supervisor" checkbox is checked. The "Hard Lock WO" checkbox is checked. The "Publically Available" checkbox is checked. The "Comment From Request" field contains the text "Water main and busted a leak, needs patching". The status bar at the bottom shows "Record 1 of 97" and "View Mode Ready...".

To see a list of the records, use the Locate Button . You’ll see the filtered record set only (the 97 records found in your filter).

Filter with 'In List' (Statuses)

Next, let's filter out the old Work Orders that are completed or cancelled, leaving only current work for Supervisor Sean Ray. You'll need to filter out all the Statuses indicating the Work Order is finished. Return to your filter form and

find Status Text on Pg. 3.

Instead of 'equal', which allows it to be equal to only one value, select 'in list',

which allows you to choose several matching values.



The image shows a filter form with a label 'Status Text'. To its right is a dropdown menu currently showing 'in list'. Further right is a list box containing three items: 'In Service Bay', 'Missing Required Data', and 'New Work Order'. The list box has up and down arrow buttons on its right side.

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


"I want Work Orders where Status Text is in this list:

- ✓ Missing Required Data
- ✓ New Work Order
- ✓ Scheduled ... etc..."

Click 'Count Records' again - all open Work Orders for Supervisor Sean Ray. Click 'Go' to open the records, and 'Locate' to see a list.

Save the Filter

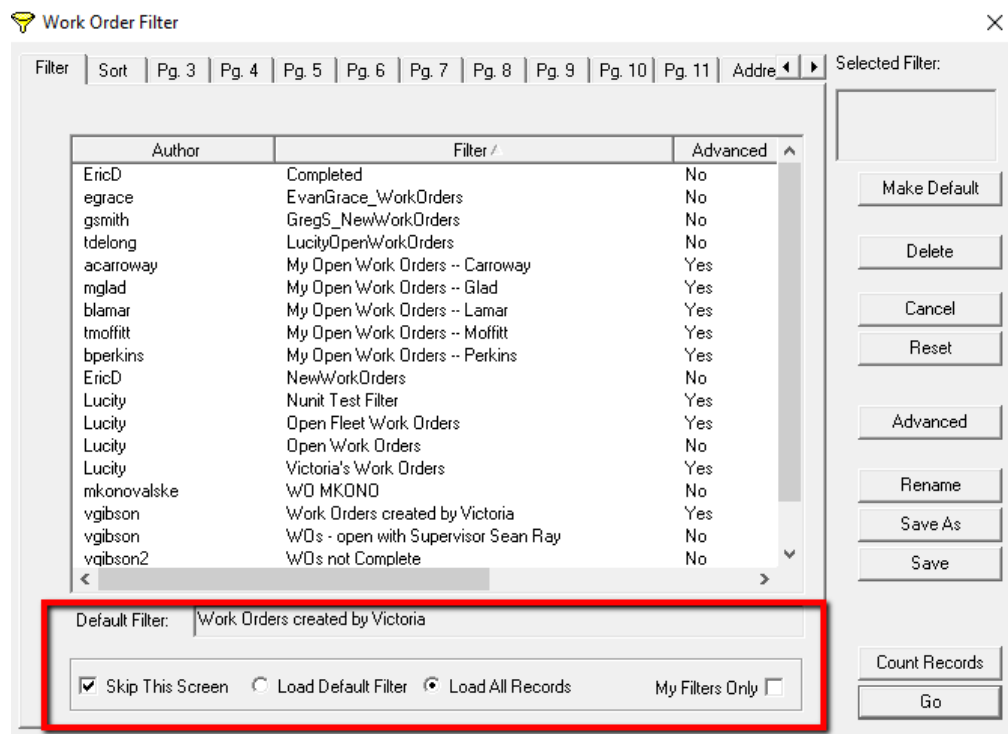
Filters can be saved for use in the future. To save a filter, select the "Save" button if it is the first time you have saved the filter or "Save As" button on the Filter screen. The saved filters will appear on the filter window. Filters created by the user currently logged into the desktop will also appear in

the drop-down list next to the filter button .

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Filter Display Options

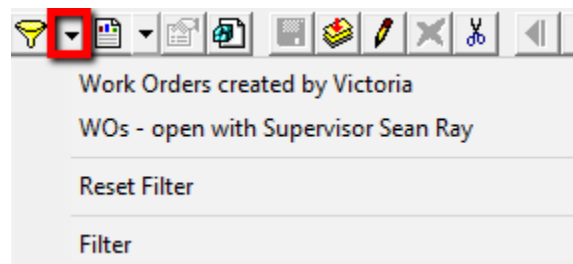
The selection buttons at the bottom of the “Saved Filters” list allow you to choose to display only your own saved filters and indicate whether or not a default filter will be used each time a module is opened. Note: Default filters are workstation specific.



1. When you select the “Skip this Screen” option, the filter form will not appear each time the module is opened. Instead, the system will open the module directly to the record set. If needed, you can still open the filter from the module toolbar.
2. When the “Load Default Filter” option is selected, the system runs the filter marked as default each time the module is opened. The default filter will be listed at the bottom of the screen.
3. To change the default filter, highlight a different filter name in the saved filters grid and click the Make Default button on the right-hand side of the filter screen.
4. When the “Load All Records” option is selected, the system will display all records each time the module is opened.
5. When the “My Filters Only” option is selected, the saved filters grid will display only the filters saved using your Lucity login ID. If this option is not selected, all saved filters, including those saved by other Lucity users, will appear in the grid.

Resetting a Filter

After running a filter, you can reset the records in the module back to the full list by selecting “Reset Filter” located in the Filter drop-down list.



Advanced Filters

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

Keep in mind that for more advanced types of filters it's very important that you have knowledge of SQL syntax to create your queries. Also, you should know that the filter syntax differs depending on which database you are using (i.e., SQL Server or Oracle). Finally, reports won't run properly with advanced filters. You'll need to define the Report SQL in order to use advanced filters in your reports. For additional information on our advanced filters, please consult our Lucity help guide or talk to your database administrator for help writing SQL queries.

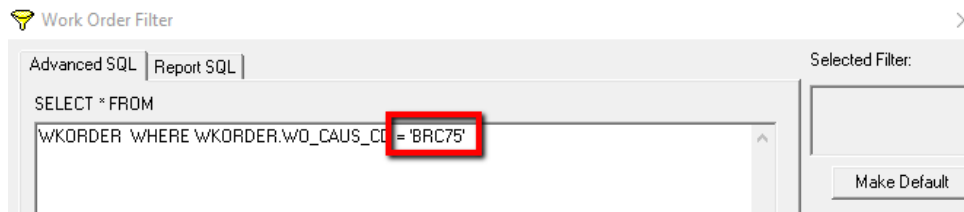
Filtering for Null Values

In our first example, we'll show you how to create a filter for a null value. In other words, we'll show you how to filter for a blank field. The easiest way to create this type of advanced filter is to start with a standard filter.

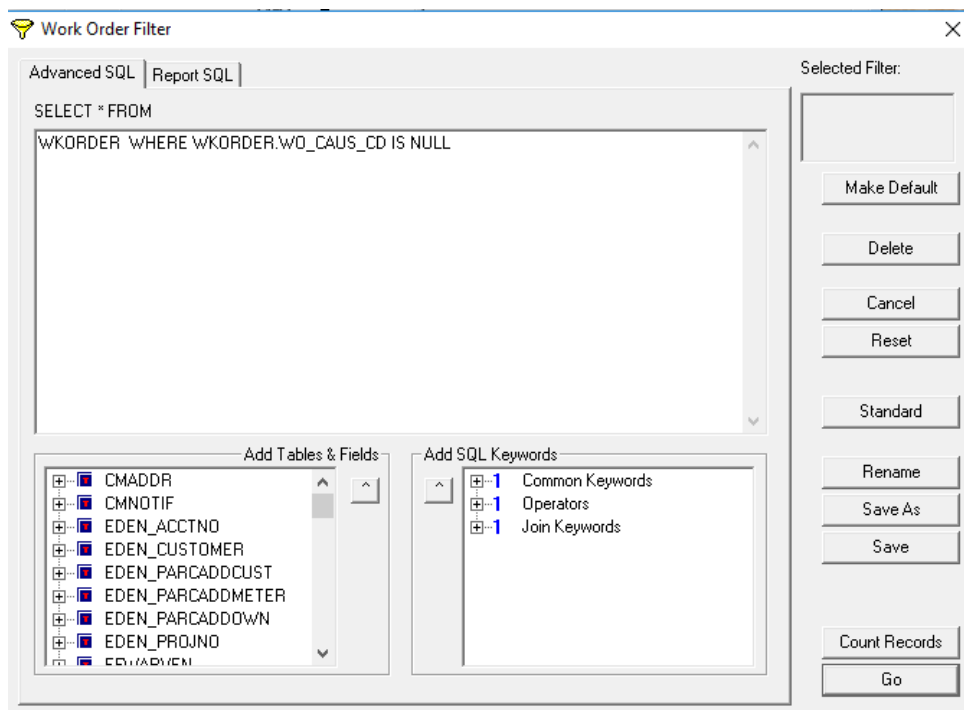
1. First, select a field to filter on. We'll use the Cause field in Work Orders.
2. Select 'equal' from the drop-down list. Then, highlight any value in the next field. It doesn't matter which one you select as we'll be deleting it in the next step.
3. Click the Advanced button.

The screenshot shows the 'Work Order Filter' dialog box. It has a tabbed interface with 'Filter' selected. The 'Cause' field is highlighted with a red box, showing a dropdown menu with the value 'equal' and a list of values: BRC75, PRK20-10, and PRK28-10. The 'Advanced' button on the right side of the dialog is also highlighted with a red box. Other buttons visible include 'Make Default', 'Delete', 'Cancel', 'Reset', 'Rename', 'Save As', 'Save', 'Count Records', and 'Go'.

4. In the Advanced SQL window, delete the = sign and anything after it. Here, we'll delete the = sign and 'BRC75'.



5. Next, type IS NULL where you made the deletion.
6. Click GO to see your filtered set. This particular record set will contain any records where the Cause field is null (blank).



Filtering Using 'OR' Statements

Now, we'll show you how to alter a standard filter to include an 'or' statement. This is another kind of advanced filter that's really quite simple to use. For example, you may want to use this type of advanced filter to find all Work Orders where you are listed as either a Lead Worker or a Supervisor.

1. On Pg. 5 of the filter screen, set the Supervisor Text and Lead Worker Text equal to the name of the person. Here, we've selected Marian Schultz.

- As the filter appears initially, it will return all records where both the supervisor AND lead worker are Marian Schultz. Since we want to return records where she is listed in either capacity (not both), we'll use an advanced filter. Click the *Advanced* button.

Work Order Filter

Filter | Sort | Pg. 3 | Pg. 4 | Pg. 5 | Pg. 6 | Pg. 7 | Pg. 8 | Pg. 9 | Pg. 10 | Pg. 11 | Address | Selected Filter:

Supervisor: <None>

Supervisor Text: equal | Marion Schultz | Matt Barber | Mellie Mcclaskey

Lead Worker: <None>

Lead Worker Text: equal | Mariella Serna | Marion Schultz | Marion Slay

Contractor: <None>

Contractor Name: <None>

Priority: <None>

Priority Text: <None>

Buttons: Make Default, Delete, Cancel, Reset, Advanced, Rename, Save As, Save, Count Records, Go

Work Order Filter

Advanced SQL | Report SQL

SELECT * FROM WKORDER WHERE WKORDER.WO_SUPR_TY = 'Marian Schultz' AND WKORDER.WO_EMP_TY = 'Marian Schultz'

- On the Advanced SQL tab, delete the word **AND** and type **OR** in its place.
- Add parentheses around the new query: WKORDER WHERE (WKORDER.WO_SUPR_TY = 'Marian Schultz' OR WKORDER.WO_EMP_TY = 'Marian Schultz')

Work Order Filter

Advanced SQL | Report SQL

SELECT * FROM WKORDER WHERE (WKORDER.WO_SUPR_TY = 'Marian Schultz' OR WKORDER.WO_EMP_TY = 'Marian Schultz')

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

Filters for 'In List' Numbers

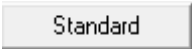
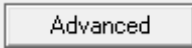
The final type of advanced filter that we'll demonstrate is a filter for numbers in a list. Remember, earlier in this workbook we discussed filters for 'in list' statuses. That kind of filter allowed you to select multiple values from a pick list; however, certain fields in the filter form don't provide pick lists. These include fields like Work Order and Request Numbers. To search for multiple Work Order Numbers in a list, complete the steps below:

1. On Pg. 3 of the filter window, select 'in list' from the drop-down menu beside Work Order #.
2. In the field to the right, type your first Work Order Number as it appears in the *Work Orders* module. Then press the <Enter> key. Your cursor will move to the next line allowing you to add an additional number. You can continue to add as many numbers as you wish.
3. In this example, our filter will return the three work orders numbered 17-000002, 17-000213, and 17-000751.

The screenshot shows the 'Work Order Filter' window. The 'Filter' tab is selected, and the window is on 'Pg. 3'. The 'Work Order #' field is set to 'in list' and contains a list of three work order numbers: 17-000002, 17-000213, and 17-000751. Other filter fields like Status, Status Text, Status Date, Status Time, Category, Category Text, and Problem are all set to '<None>'. On the right side, there are buttons for 'Make Default', 'Delete', 'Cancel', 'Reset', 'Advanced', 'Rename', 'Save As', 'Save', 'Count Records', and 'Go'.

4. Click GO to view the filtered set.

Changing Filter Modes


You can switch from Advanced to Standard filter mode and vice/versa. If you are in Advanced mode, click the Standard button  to switch to Standard filter mode. If you are in Standard filter mode, click the Advanced button  to switch to Advanced filter mode.

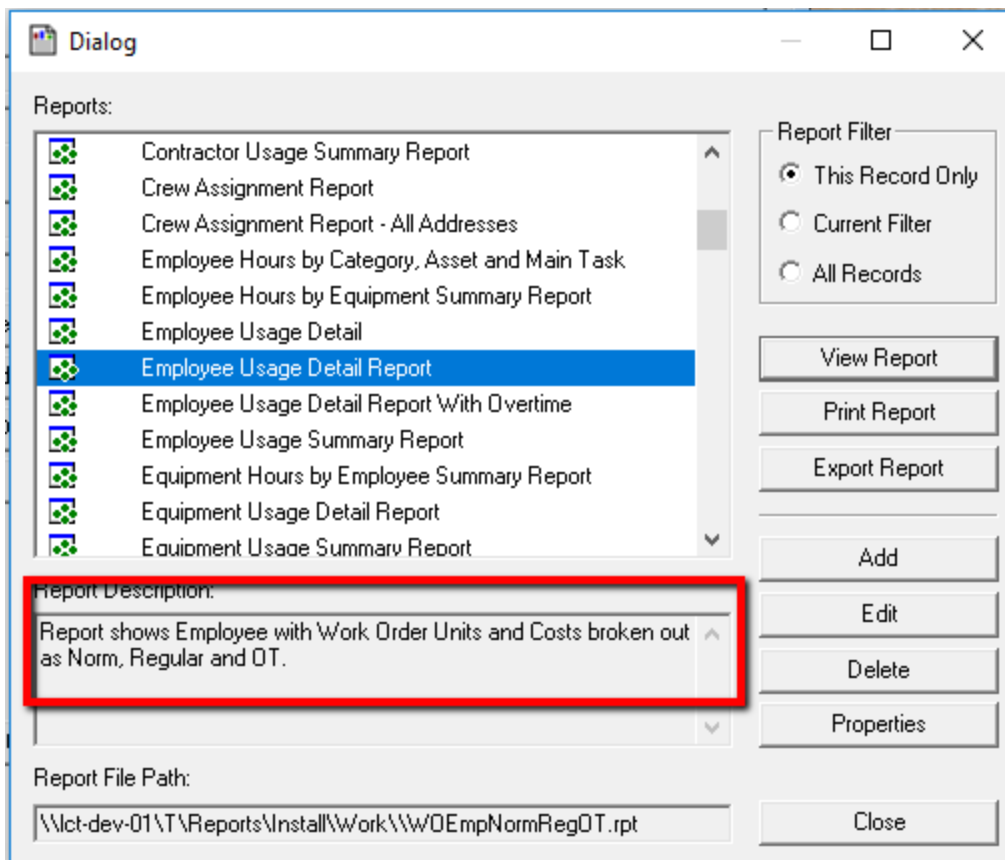
Reports



Reports are a convenient way to view and organize data. The desktop application contains a set of pre-defined reports in each module. These reports can be modified using Crystal Reports™ software. You can also create your own custom reports using Crystal Reports. The following example is from the *Work Orders* module; however, these same steps apply in all other modules.

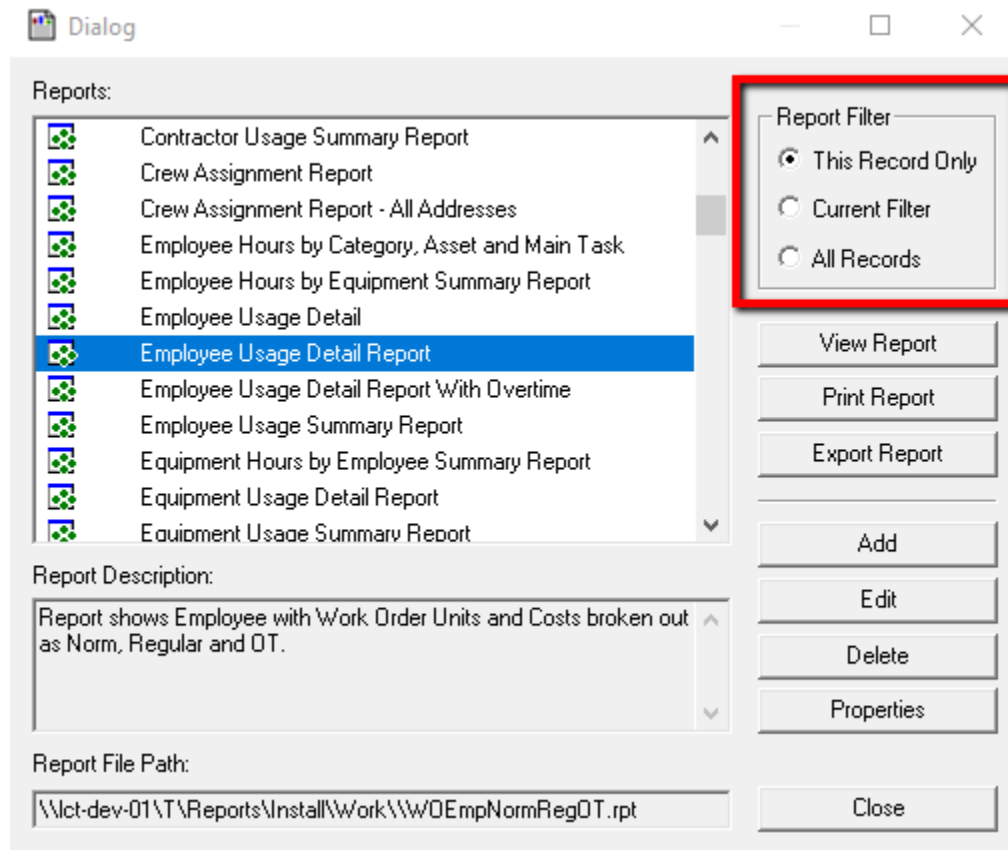
A supervisor may need a report documenting which work orders have been worked on by each employee. Our system contains a pre-defined report with just this information (the Employee Usage Detail report).

1. To access the report, click  on the module toolbar.
2. The names of all pre-defined reports are listed in the Reports dialog box. Scroll down to find the report you are looking for.
3. The Report Description box at the bottom of the screen will display a brief summary of the highlighted report.
4. You may view, print, or export the report.



Report Filter


Note the Report Filter box in the upper-right corner. This feature allows you to choose which records will be included in the report.



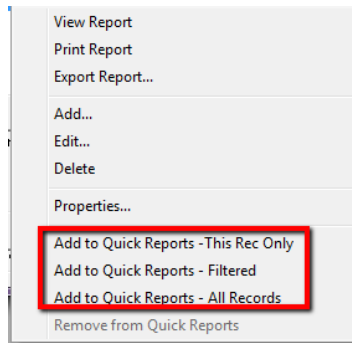
1. If you select "This Record Only", the report will only include the information on the current record.
2. If you select "Current Filter", the report will include all records in the current filtered set.
3. If you select "All Records", the report will include all records in the module.


Quick Reports

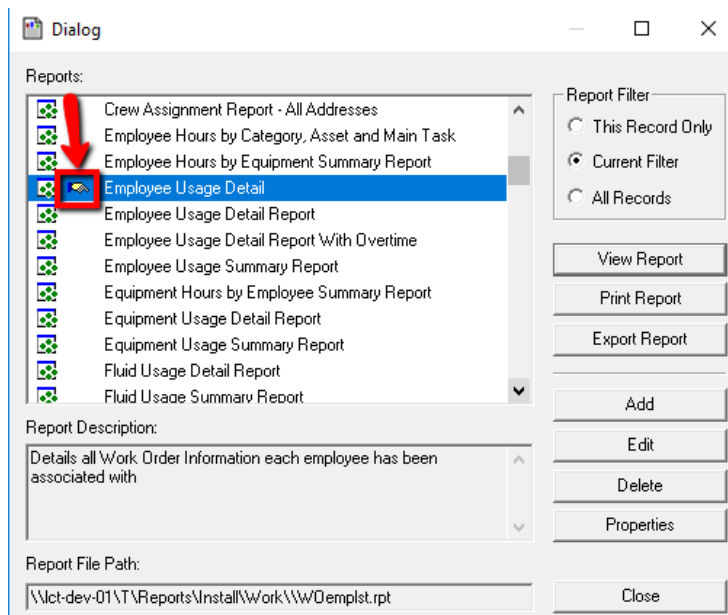
You may have some reports that are used more frequently than others. You can save these reports as "Quick Reports". This feature allows you to select and generate a report quickly, without having to open the entire Report List. Quick reports are Lucity user ID specific; therefore, the Quick Report list will display only the reports you have saved.

1. Click  on the module toolbar to open the report list.
2. Right click on the report you wish to save as a "Quick Report" (default report).

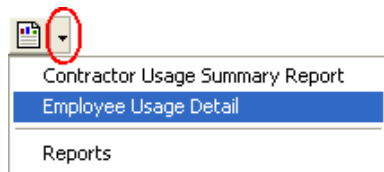
3. Select Add to Quick Reports, with the option to save it on this record only, the filtered data set, or the all the records.



4. Once a report is saved as a Quick Report, a pointing hand  will appear in front of the report name.





Quick Reports will also appear in the list when you click the drop-down arrow beside the toolbar button.

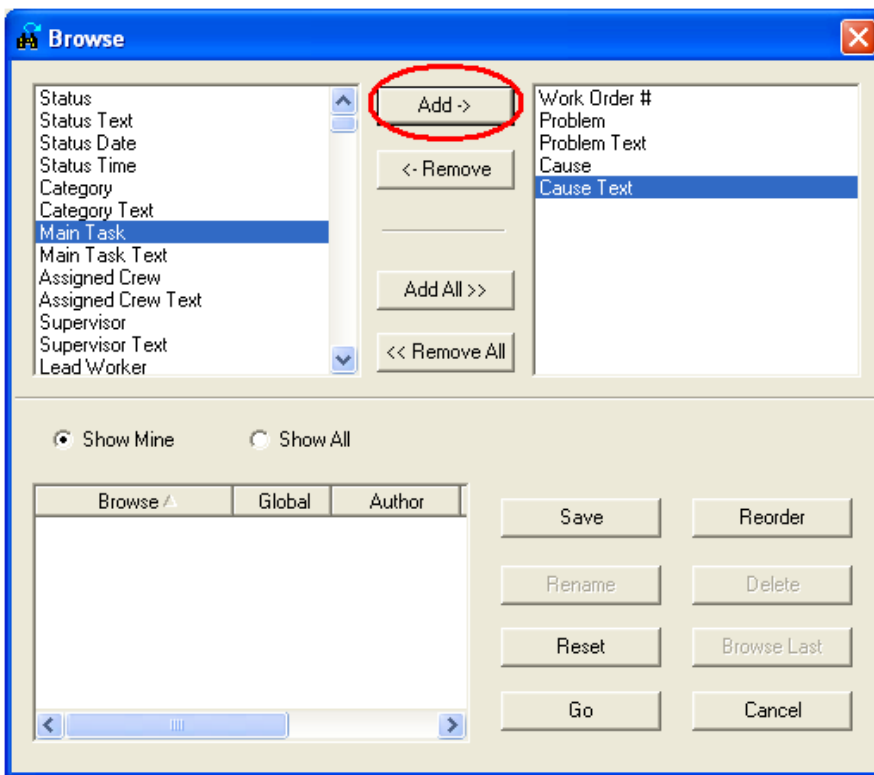


Browse



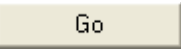
The Browse feature is used for reporting on-demand. It allows you to quickly generate a report in table format. The following example is from the *Work Orders* module; however, these same steps apply in all other modules.

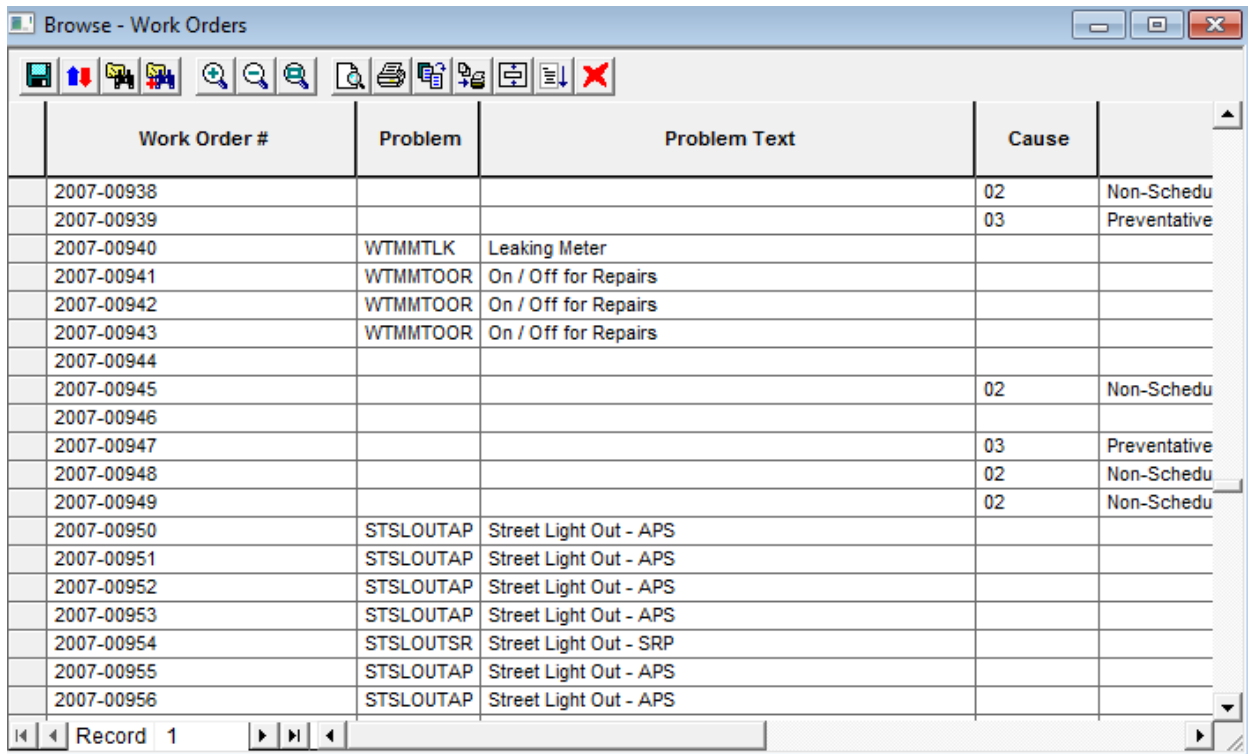
1. To access the Browse function, click  on the module toolbar.
2. Using the Browse dialog box, you can select a series of fields from the grid on the left and add them to the grid on the right. This allows you to build a report for all of your records showing only the information you are interested in seeing.
3. Highlight a field in the left-hand grid.
4. Click the  button to move it to the right-hand grid.
5. Continue adding additional fields as necessary.



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Browse Report

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

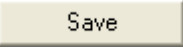


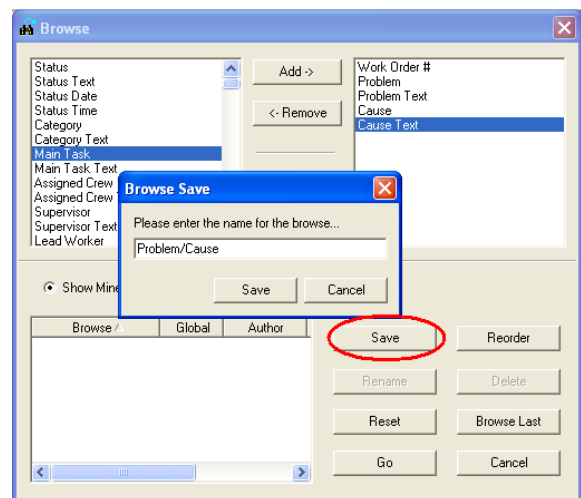
Work Order #	Problem	Problem Text	Cause	Cause Text
2007-00938			02	Non-Schedu
2007-00939			03	Preventative
2007-00940	WTMMTLK	Leaking Meter		
2007-00941	WTMMTOOR	On / Off for Repairs		
2007-00942	WTMMTOOR	On / Off for Repairs		
2007-00943	WTMMTOOR	On / Off for Repairs		
2007-00944				
2007-00945			02	Non-Schedu
2007-00946				
2007-00947			03	Preventative
2007-00948			02	Non-Schedu
2007-00949			02	Non-Schedu
2007-00950	STSLOUTAP	Street Light Out - APS		
2007-00951	STSLOUTAP	Street Light Out - APS		
2007-00952	STSLOUTAP	Street Light Out - APS		
2007-00953	STSLOUTAP	Street Light Out - APS		
2007-00954	STSLOUTSR	Street Light Out - SRP		
2007-00955	STSLOUTAP	Street Light Out - APS		
2007-00956	STSLOUTAP	Street Light Out - APS		

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

Saving a Browse

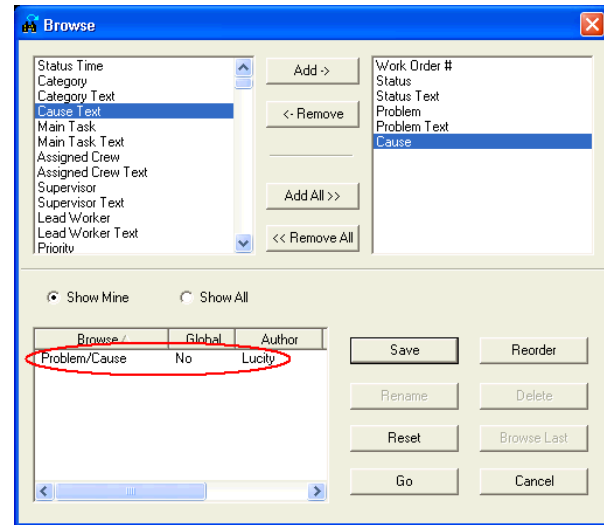
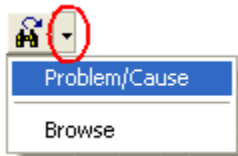
If this is a Browse report you would like to use frequently, you can save it to your Browse list.

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



Quick Browse

After saving a Browse, you can access it through the Quick Browse list in the menu the next time the module is opened. All Quick Browsers appear in the list when you click the drop-down arrow beside the toolbar button.



Document Control



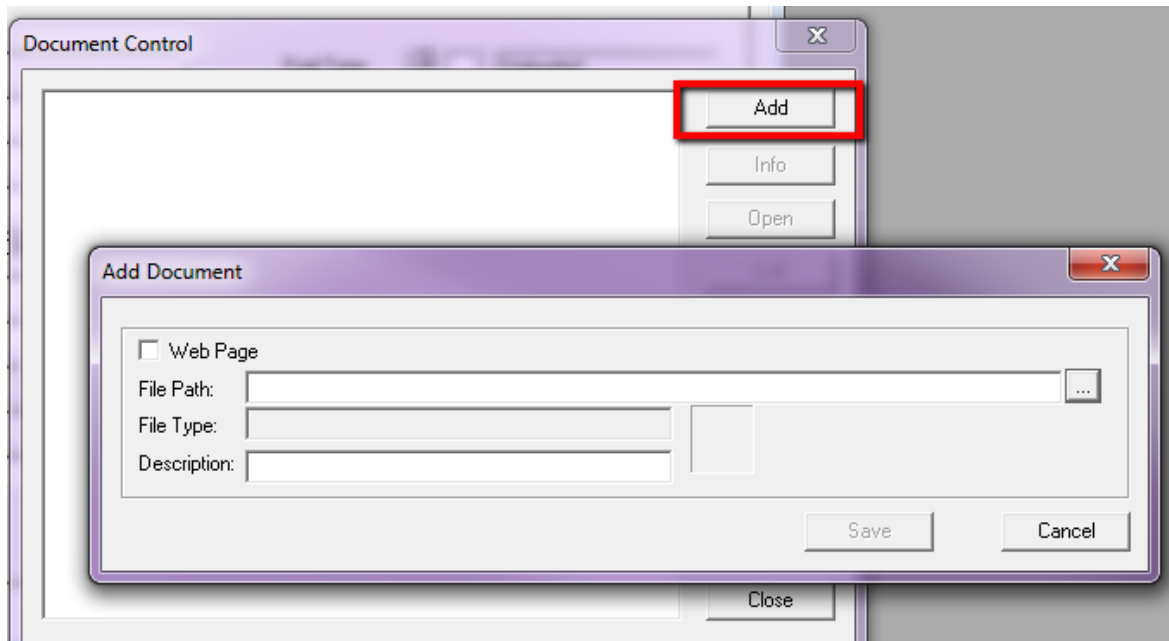
The document control feature allows you to add or delete documents, videos, images, and URLs to/from the record that you are on. For example, users may want to attach a copy of an email to a customer record or they may attach a digital picture to an inspection record.


Note: It is important to remember that when adding documents using the desktop application, the document is only linked to the asset in Lucity. If the document is deleted from your computer, it will no longer be accessible from the Lucity system. In addition, if the document is on your computer and not available to the network, other users will see that it is attached, but will not be able to view it. The web application allows uploading of documents to a document server that can be accessed by all users.

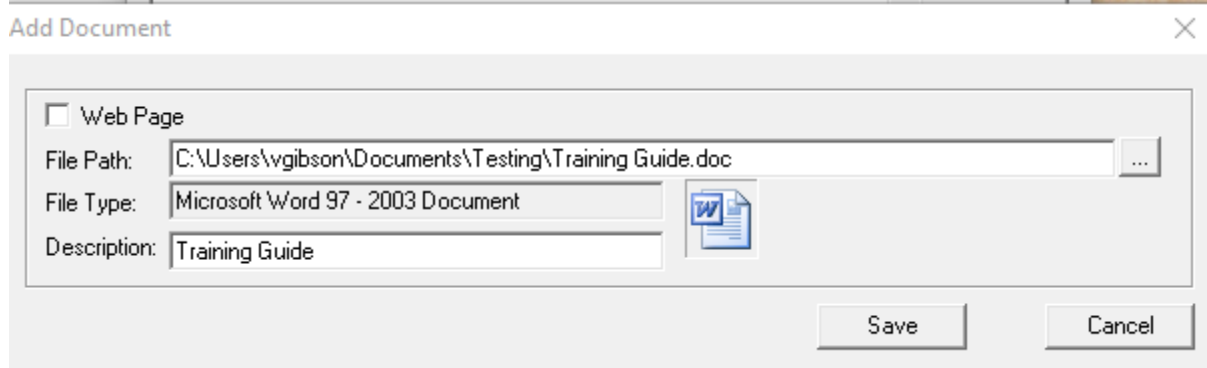
NOTES: _____

To add a document, do the following:

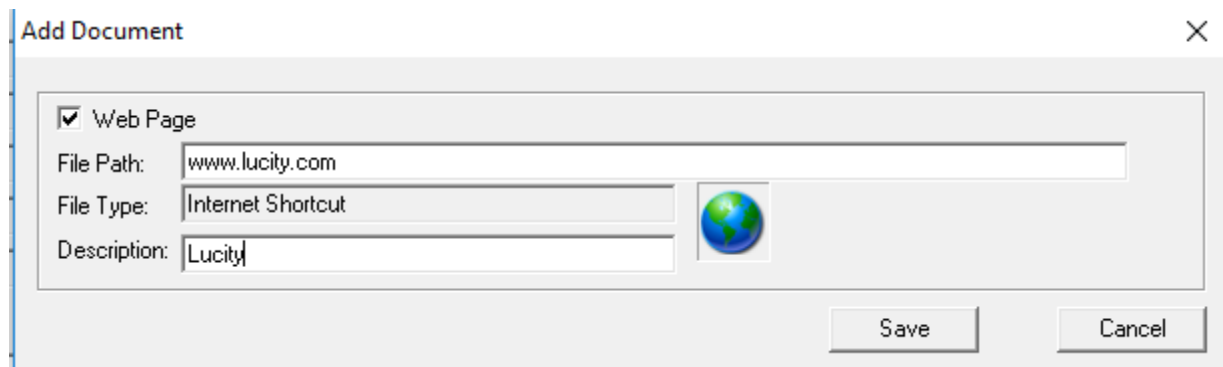
1. Click the Add button and fill out the dialog that appears:



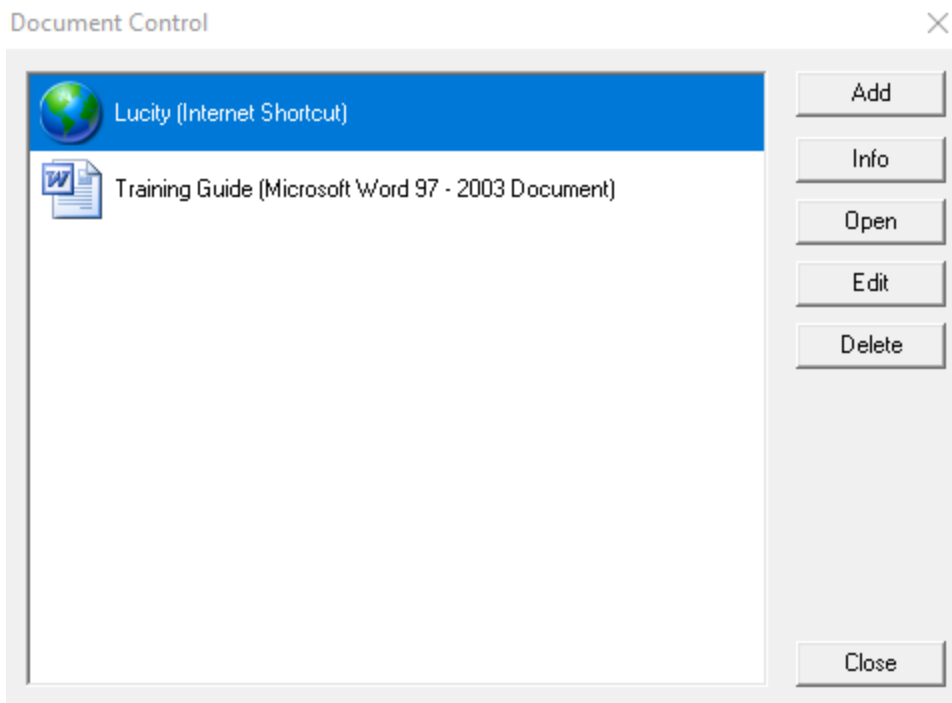
2. For document type files, browse to the file location by clicking the  button.
3. Write a brief description of the document.




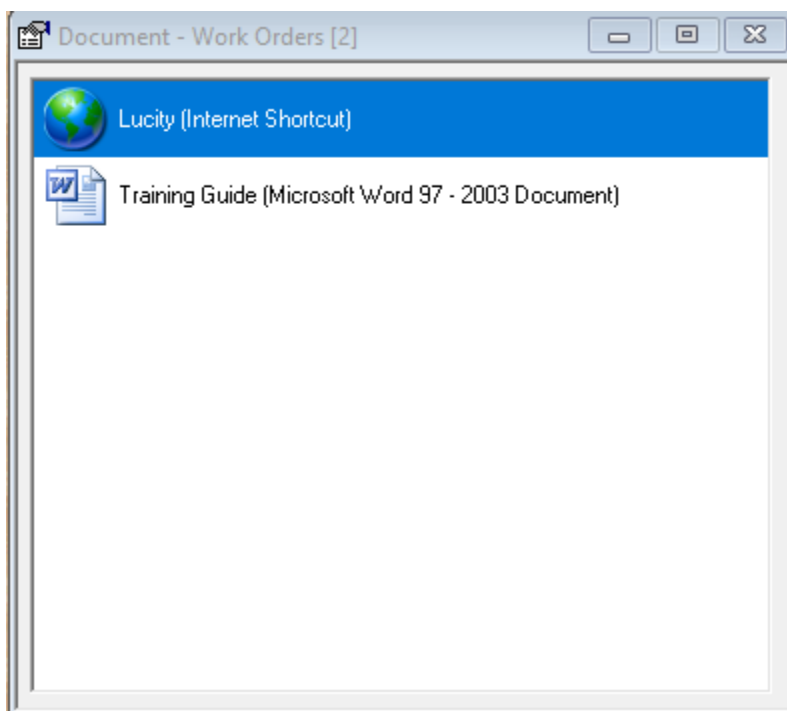
4. For links to web pages, check the “Web Page” checkbox. The File Path will be enabled allowing you to type the web address



5. Click **Save** to save changes.
6. To access the saved documents or web URLs, click the **Document Control** button again.




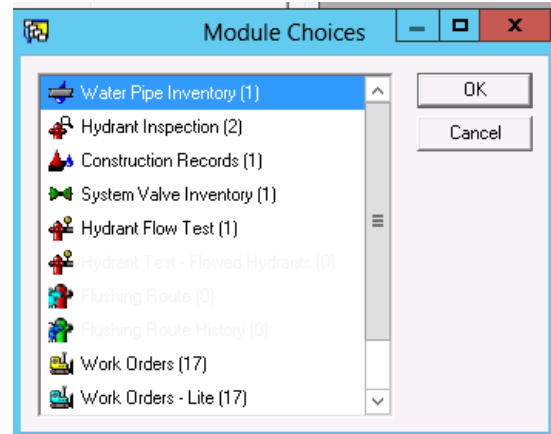
7. If the record contains documents, then this button will also be enabled: . Clicking on that button will enable you to have this document dialog open all the time for quick access to the saved files and URLs:



You can double click on each item to open them from this dialog.

Relationship Button

The Relationship button  is available to move quickly from one related record to another. The **Lucity** systems rely on the integration of modules to efficiently record and analyze data. For example, the Hydrant Inventory module stores the Valve associated with a record. It also shows stores information about its inspections. The hydrant, valve, and inspections are related. The Relationship Button displays any relationships of the current record to records in other modules. Next to each relationship name is a count of the number of related records. Here's a picture of some relationships to a Hydrant Inventory record:

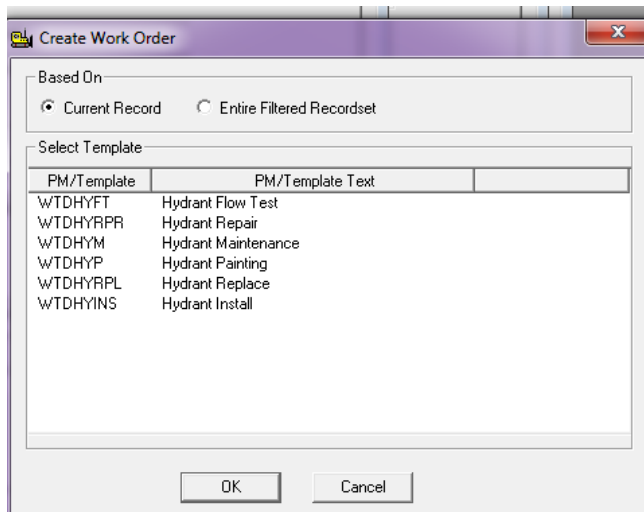


Double-clicking on one of the relationships will open the related record(s) in the other module.

Create Work Order



The Create Work order Button allows users to create new work order records directly from assets, inspections or work requests. This tool on the desktop can either create a work order(s) for the current record or the entire filterset. It can also create a work order based on a work order template. When you click the Work Order button, a dialog similar to the following will appear that is from the Hydrant Inventory module and lists several existing templates:

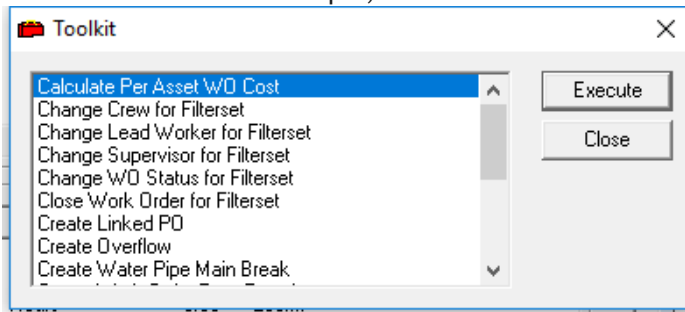


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Toolkit

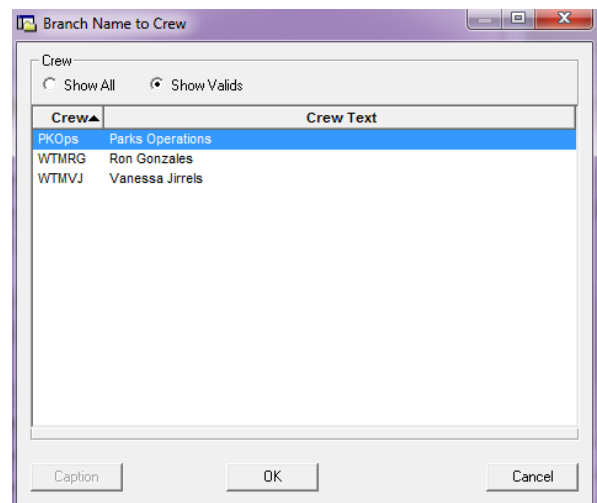


Some modules have a Toolkit button that has provides users with functions designed for specifically that module. When the dialog opens, you can select a tool that you wish to execute. For example, the Work Order module has this toolkit:



Sometimes, another dialog will appear after selecting a tool that requests more information. For example, the “Change Crew for Filterset” toolkit will show a dialog similar to the following that allows you to select a new crew:

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



Customizing Toolbars

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

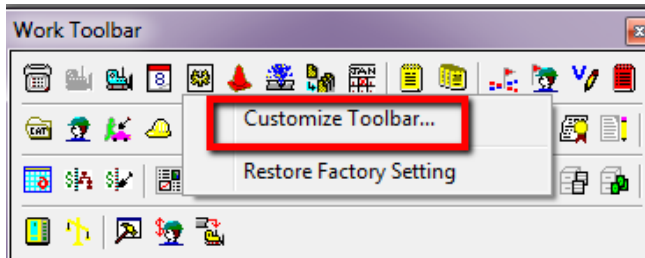
The display a toolbar, select one or more toolbars in the View menu:



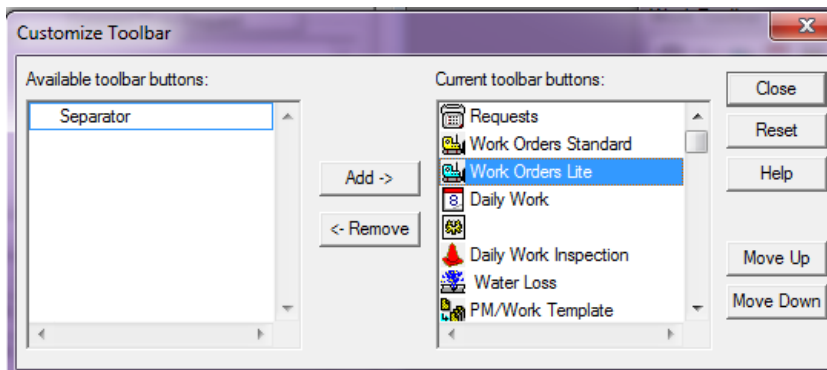
After selecting the toolbar, it will first display at the top of the desktop. It can be moved to a different location on the screen by clicking on the bar at the far left end and dragging it to a new position:



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



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




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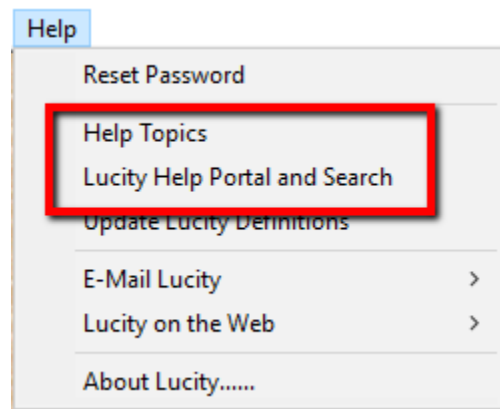
Extra Information

Accessing Help Files

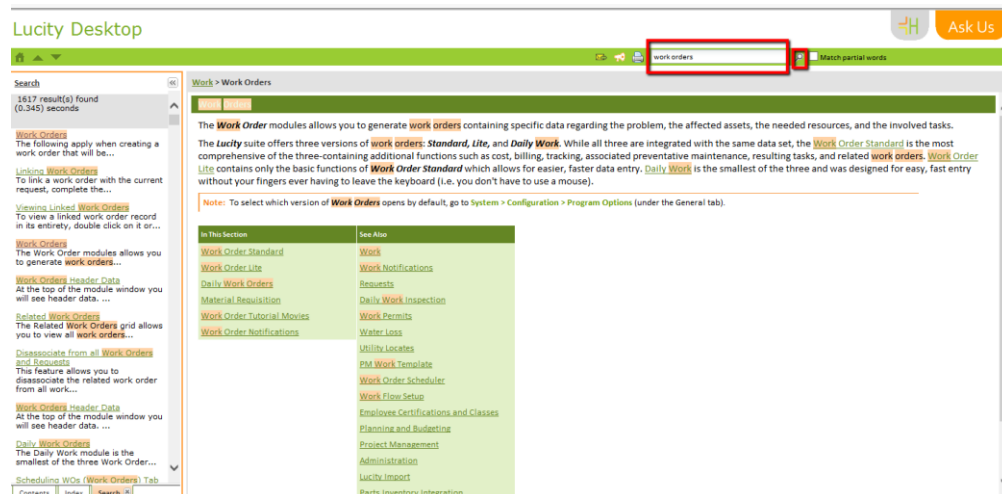
The Lucy help files are a very useful tool for finding out more information on any topic within the Lucy system. The help file requires an internet connection.

When you are in a specific module, if you click on the Help button , the help file for that module will open.

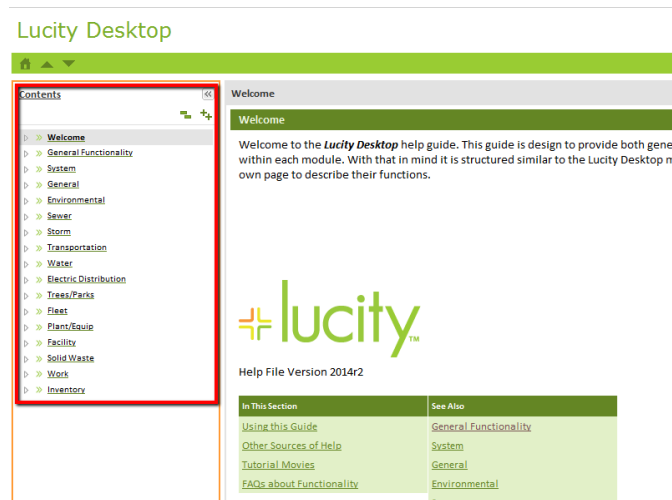
To access the full desktop help file, you can go to the main Help menu of the desktop and select “Help Topics”. The desktop help file will open. You can also access all Lucy help file topics by selecting the “Lucy Help Portal and Search” from the Help menu. The Lucy Help Portal contains helpful information about all Lucy applications.



You can run custom searches using any search criteria. For example, to find information about “Work Orders” on the desktop, click on the Lucy Desktop manual, type in “Work Orders” in the search field and click the magnifying glass to search for the related help topics. You can click the links on the left side to view a topic related to Work Orders:

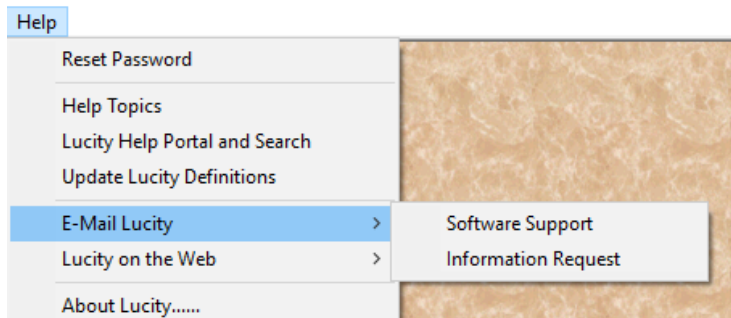


You can also drill down on the Contents menu to find detailed information on a specific topic or module:



Receiving Help and Asking for Information

You can quickly send an email to ask for help or information by using the “Email Lucy” options from the Help menu:



You can also access the Lucy Support Center or start a remote Support Session by selecting the “Lucy on the Web” options available from the Help menu:

