lucity™
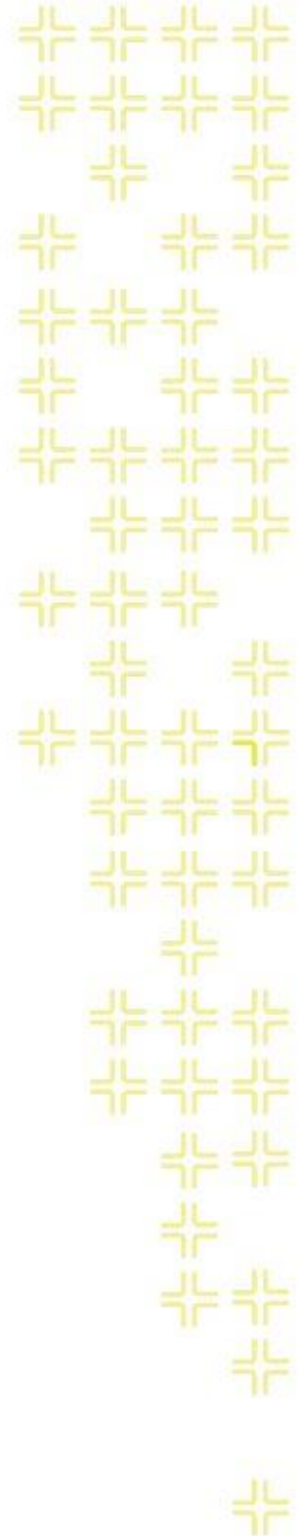
Moving to Lucity Web

Moving to Lucity Web

This booklet is designed to help users effectively move from the Lucity Desktop to the Lucity 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.

Contents

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 – similar
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.
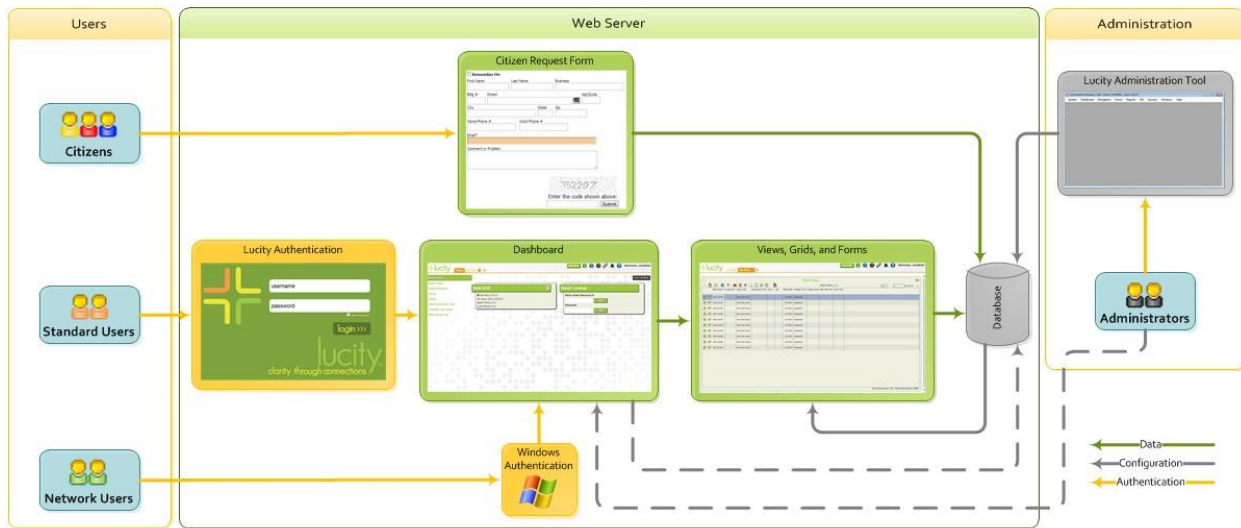
Dashboards

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.

The Dashboard is edited directly in the web application. 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.

An example of a Dashboard:
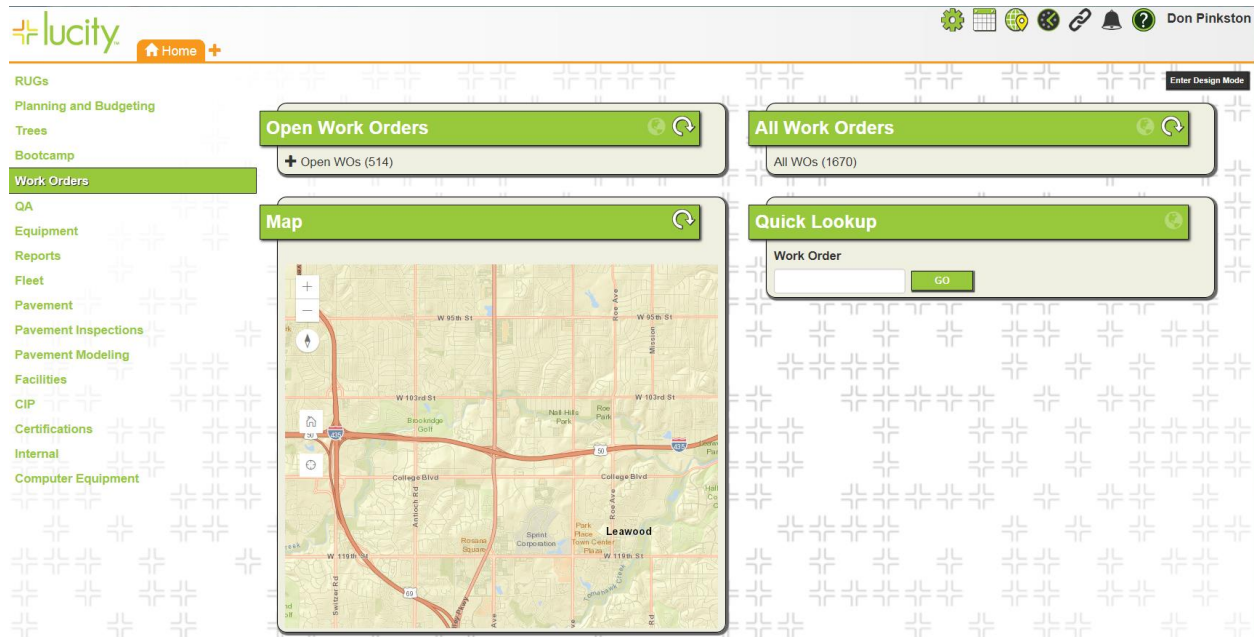
As can be seen with the examples above, the information and the appearance of the dashboards are very customizable.

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.

Dashboard Layout

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.
➕	*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.
≡	**Module View**	Appears for all module views.
✏	**Form**	Appears for all module forms.
🕐	**Timesheet**	Appears when using or editing a timesheet.
⏲	**Dashboards**, **Shared Tabs**, **Shared Tab Groups**	Appears for admins when reviewing and editing other users' dashboards.

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Application Toolbar

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

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

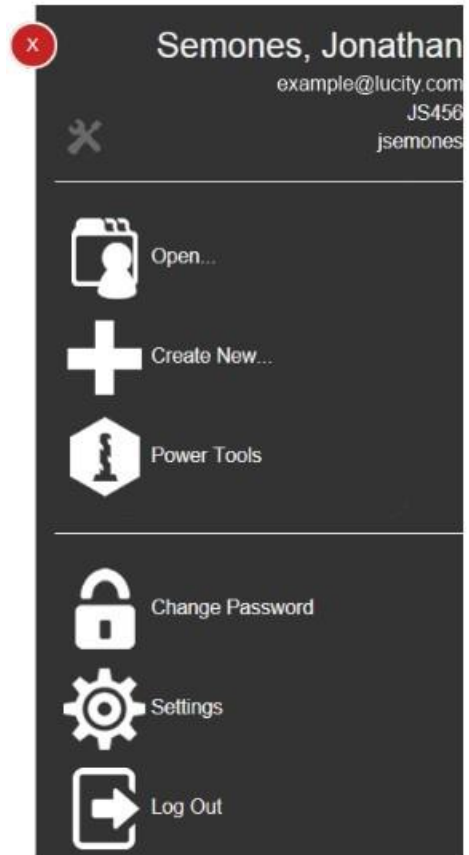| Icon	Tool	Description	Setup
⚙️	*Admin Portal*	Enables administrators to access general admin information for the entire Lucity program including Licenses, System Settings, etc...	
📅	*Work Scheduler*	Enables users to view and manage *Work Orders* using a calendar view. Launches in a new browser window.	⚙️
🌐	*Web Map*	Generates a map that displays *Lucity* data geographically. Launches in a new browser window.	⚙️
◑	*Time Sheet*	Enables users to track the time they spend on various work tasks. If multiple time sheets are available to a user, a drop-down list appears.	⚙️
🔗	*Links*	Displays a list of links to web content outside *Lucity Web*. An administrator can customize the list for an individual or a group.	⚙️
🔔	*Notifications*	Shows all of the notifications the user has received from the system during the current session. Most often, these notifications advise the user of completed *Tasks* or *Toolkit* processes. The number displayed over the icon indicates how many notifications exist. Click the X next to a notification to dismiss it.	
❓	*Help*	The Help icon provides access to several help options, including: ▪ **Lucity Help** - Opens the *Lucity Web Help Guide*. ▪ **Lucity Help Portal and Search** - Launches the *Lucity Help Portal*, which allows users to view/search all of the *Help Guides*. ▪ **About Lucity** - Displays the current product version and service pack. ▪ **Email Support** - Initiates an email to *Lucity Support*. ▪ **Lucity on the Web** - Choose (drop-down) among, including: • the *Lucity Support Center* • a WebEx support session, or • Lucity.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.

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	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.

User information

✖ **Troubleshooting Tools** — Provides the following tools:

- ▢ **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.

❌ **Close** — Closes the user pane.

Admin Controls

🗔 **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

To create custom dashboard pages for yourself or any other staff member, you must first have the proper permissions.
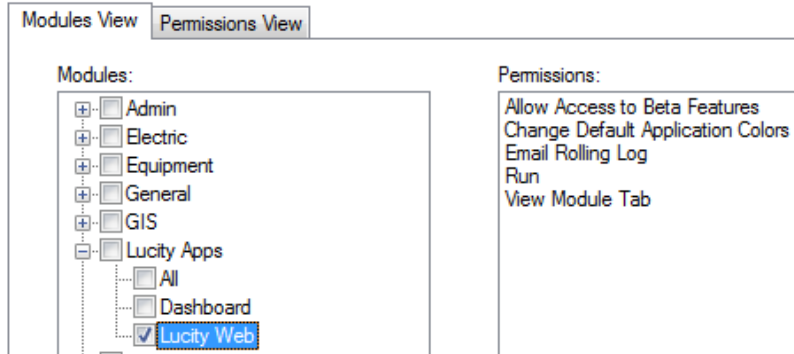
To run Lucity Web (which includes the Dashboard), all users will need to have Run permissions for Lucity Web.

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**

By clicking the Enter Design Mode, the dashboard changes as shown below:
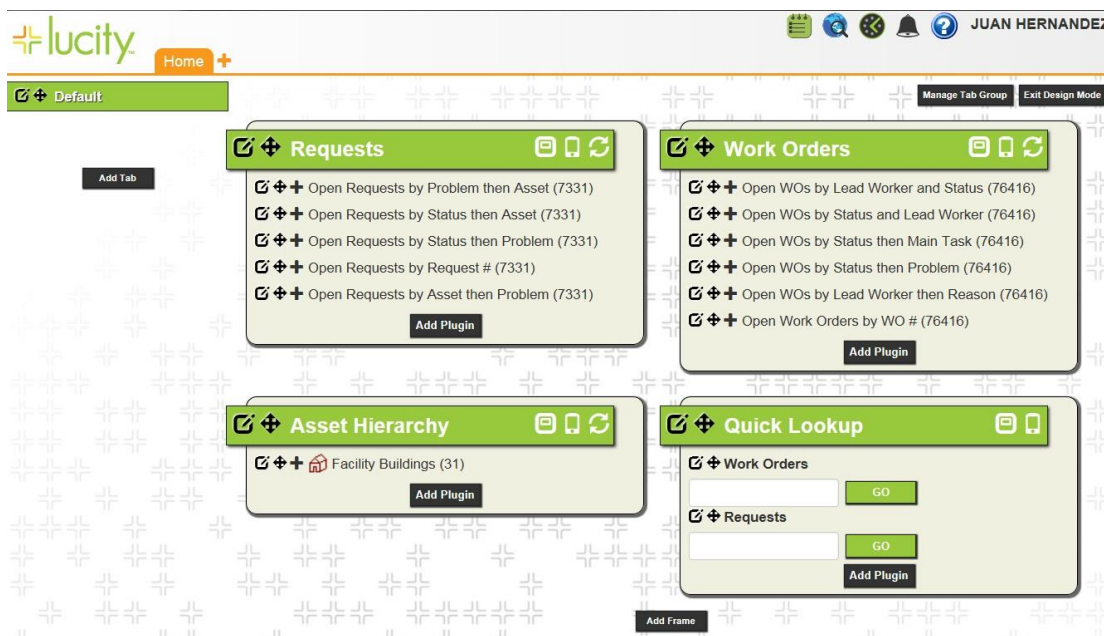
This is a true What You See is What You Get (WYSIWYG) design platform. A mix of buttons and symbols allow users to make modifications.

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

1. Click on Juan Hernandez (in the User Pane) and then hit Open
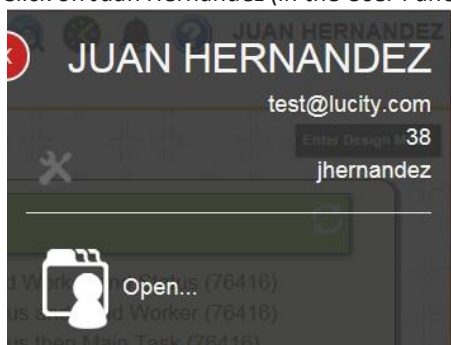
2. Select the User's Dashboard icon
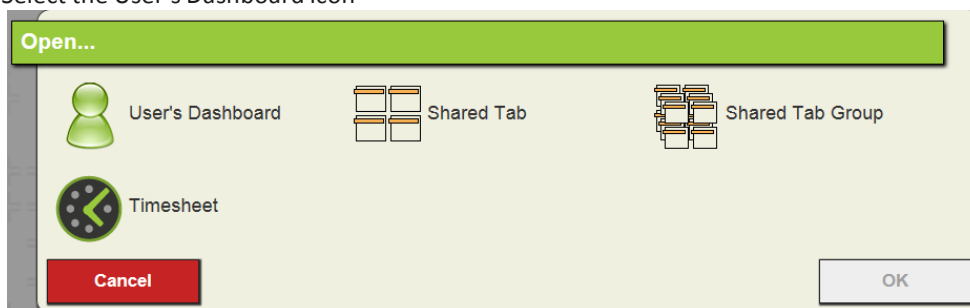
3. Select Nick Roland from the list
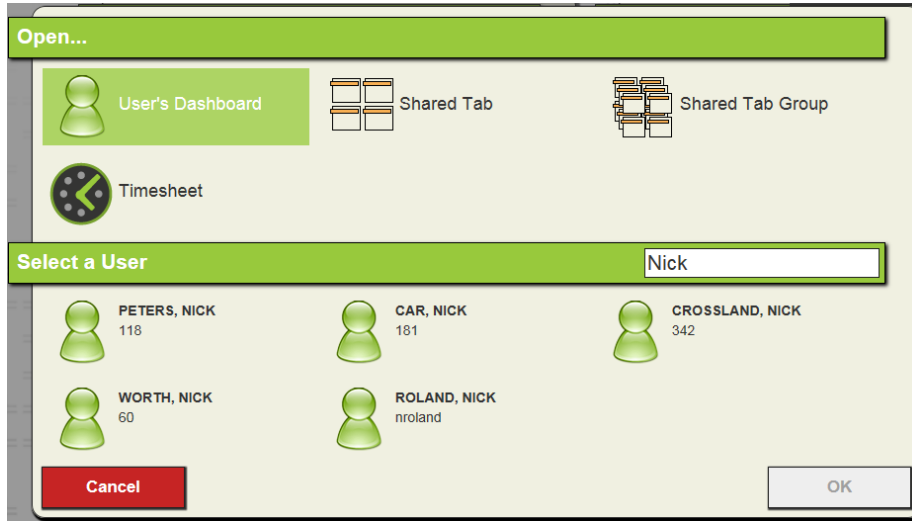
4. You will see Nick's Dashboard appear as an Application Tab.

5. Open that Tab and Enter Design Mode

Add a new Tab

1. Use the button.
2. Select Create a New Tab
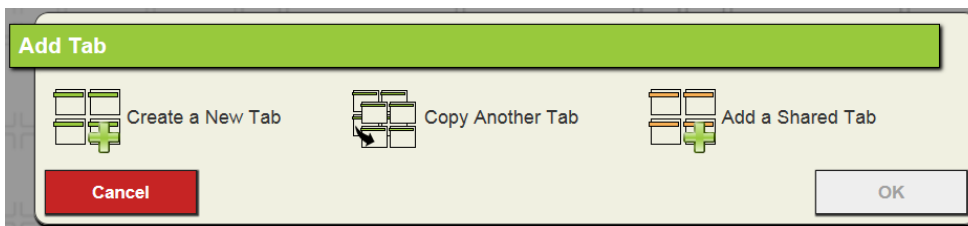
3. Call the Tab "Open WOs for Nick"
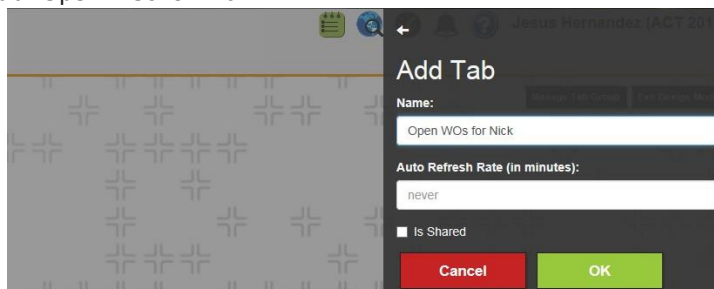
Add a new Frame

1. Use the **Add Frame** button

2. Select Create a New Frame

Add Frame

Create a New Frame   Copy Another Frame

Cancel   OK
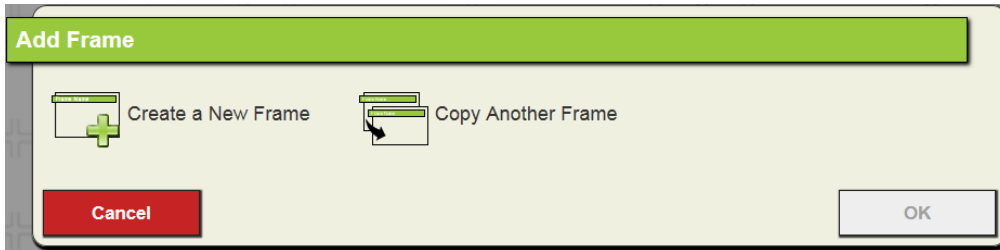
3. Name the Frame: "Nick Roland's Open Work Orders"

Add Frame

Name:

Nick Roland's Open Work Orders

☐ Span Frame
☐ Open in Desktop instead of Web
☑ Visible on Web
☑ Visible on Mobile
  ☐ Mobile Offline Support

Cancel   Save
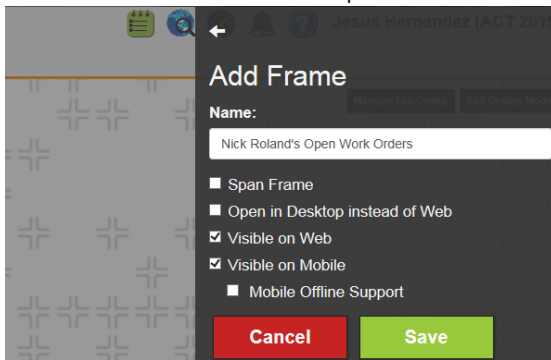
- Span Frame – Leave blank (for No)
- Open in Desktop instead of Web – leave blank
- Visible on Web – leave checked (for Yes) – You can tell in the frame if this is active if the symbol 🖥 appears next to the frame's title.
- Visible for Mobile (Your preference) – this allows this frame to be sent to 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)

Home   Roland, Nick ⊗ ➕

✏ ✛ Open WOs for Nick

✏ ✛ **Nick Roland's Open Work Orders** 🖥 📱

Add Tab   Add Plugin

Add Frame
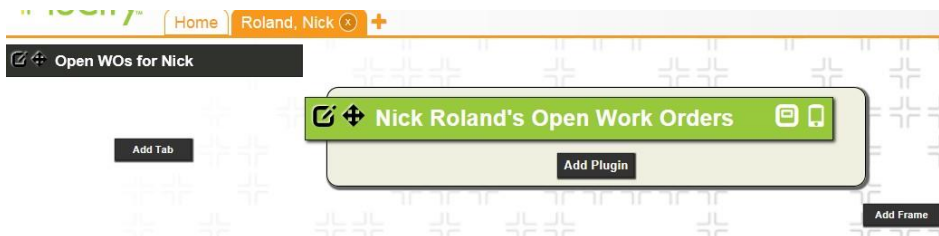
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Add a new Plugin

1. Use the **Add Plugin** button.
2. Select Create a New Plugin
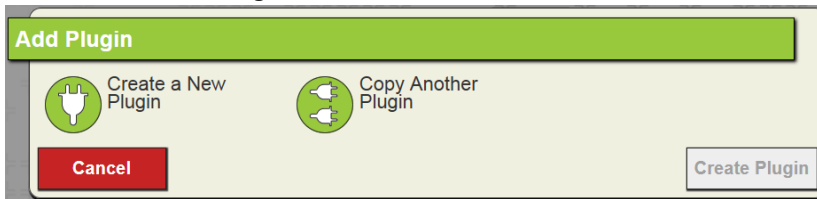
3. Select Plugin Type.
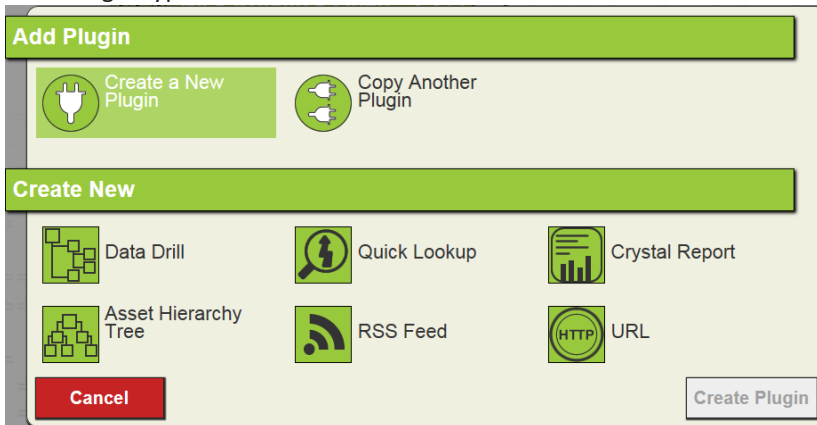
Data Drills

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

2. Acquire Filter
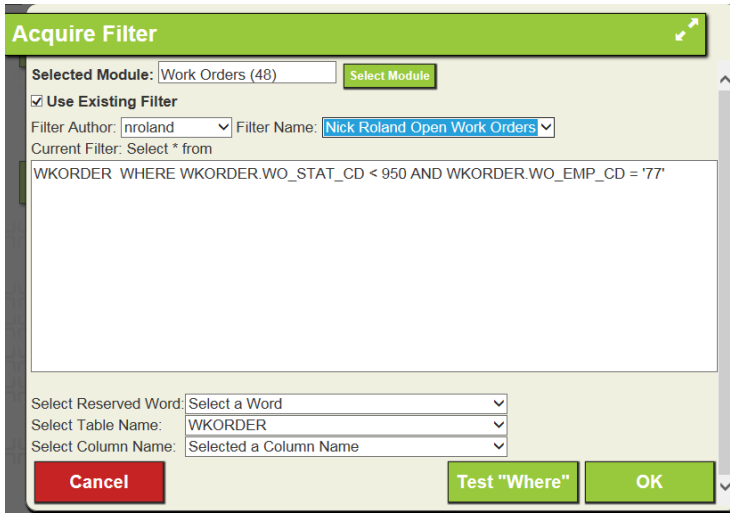
3. Test "Where" to make sure that the filter is acceptable to the program
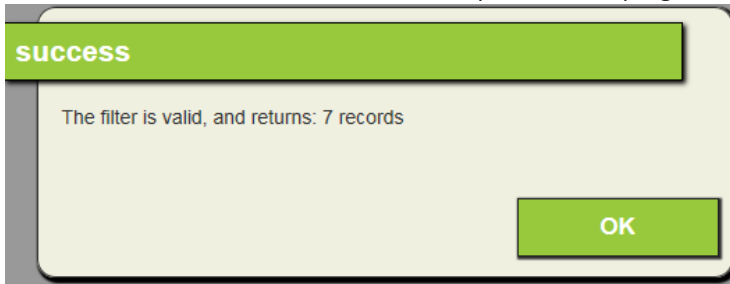
4. Hit OK on the Acquire Filter Dialog
5. Add Drill Downs
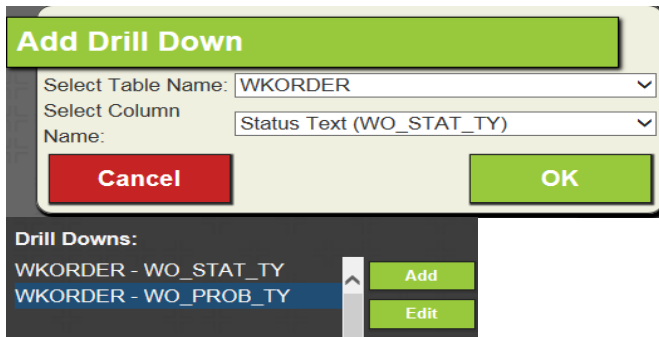
6. If you want to open up a specific view for Work Orders when Nick launches the web view, then select it using the "Select Custom View"
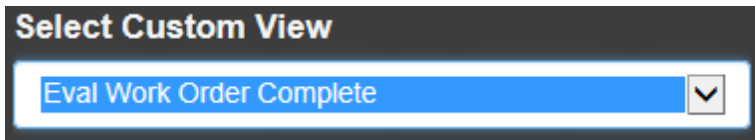
7. Save the Data Drill

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
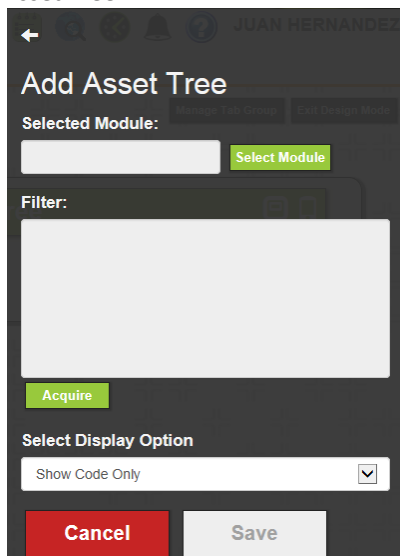
4. Select Module
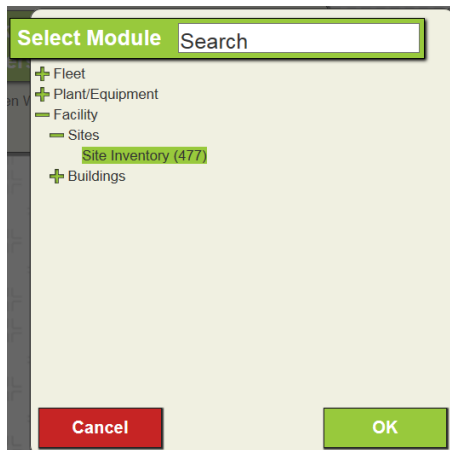
5. Acquire/Create Filter – In this case we will select a pre-defined filter called "Nick Roland's Responsibility"

6. Select Display Option (new for Version 15r2/16/16r2). Users can now select to Show Code, Show Text or Show Code and Text
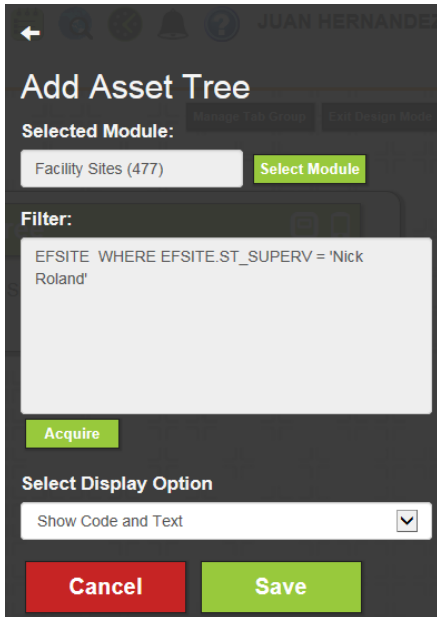
7. Save

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
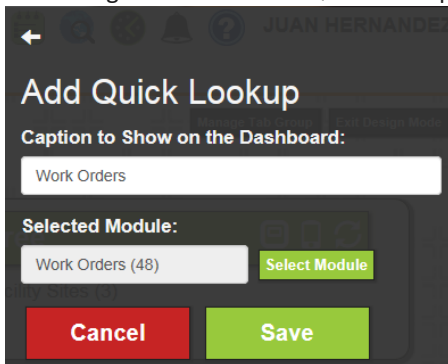
3. Add as many lookups as you want.

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CRYSTAL REPORT

1. Add Frame named Crystal Report

2. Add a new Plugin **to create** new Crystal Report Plugins

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

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.

RSS FEED

NOTE – STARTING DECEMBER 15, 2016 Google dropped support of the RSS Feed JavaScript API which Lucity as using for RSS feeds. This stopped RSS Feeds from working on all releases. Therefore, starting with Version 2017R2 we have removed RSS feeds as a plugin type.

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
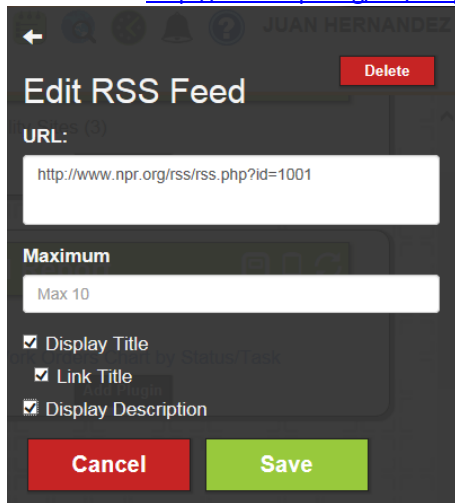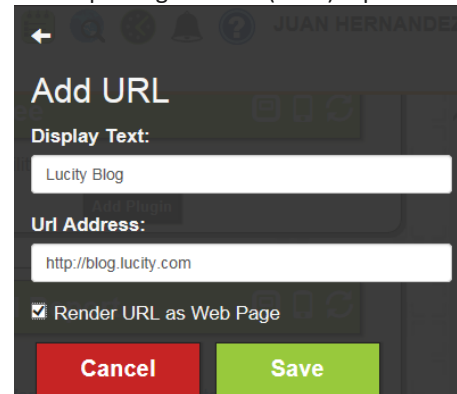
4. Maximum - Maximum controls the maximum amount of items displayed by a feed. Some Feeds offer many items, which could clutter the dashboard.

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.

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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.

1. Add Frame named "URL"
2. Add a new Plugin to create new URL Plugins
   - Display Text – The text that will appear as a hyperlink to the specified URL.
   - Url Address – The URL for the web content to link to or display
   - 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.

Map Plug-in

The Map plug-in allows users to display a map on the dashboard and view the location of data found within other plug-ins. A video of showing details of this plug-in can be found here:
https://youtu.be/T_iR7QMHCeE?list=PL6gNKzCUXa1gmEkZm0X23UmuvXwDzoDcZ
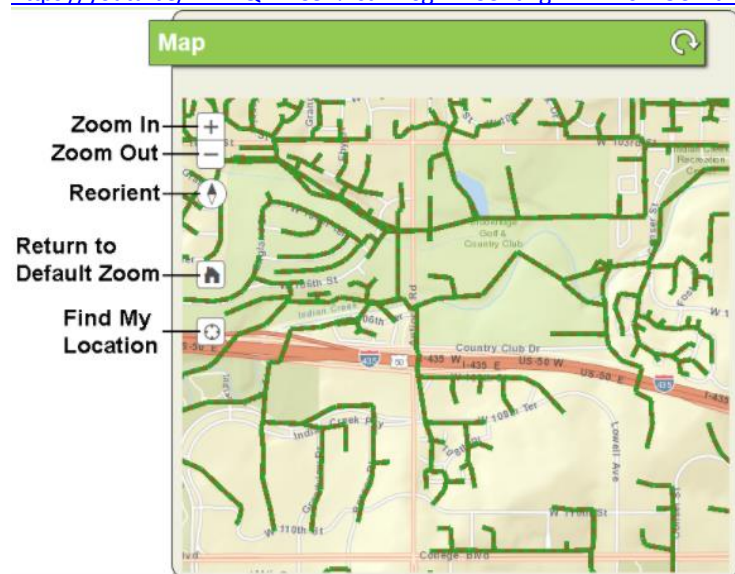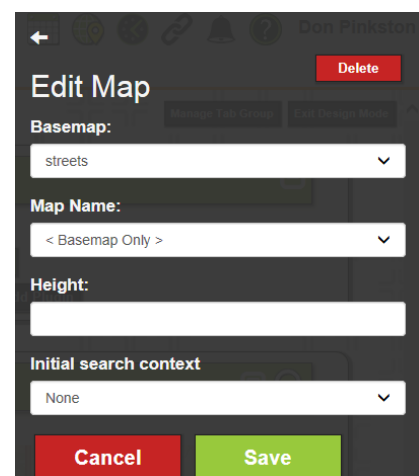
- The map can be pointed to previously setup GIS maps.
- The Basemap allows the user to select a basemap from the drop-down list, which displays the standard Esri basemaps.
- The Map Name enables the user to select which web maps to display.
- The Height controls the vertical space that the map takes up on the dashboard.

The Initial search context allows the user to select another plug-in from the dashboard tab. Then, when the tab is open, the map automatically displays data from that plug-in.

Note that each Dashboard Tab is limited to one map plug-in.

Shared Tabs & Shared Tab Groups

The Template concept that Lucity 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"
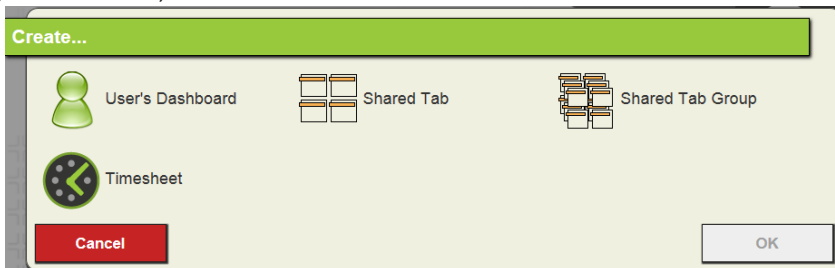
   You will notice that this new tab immediately shows up in the Application Tab.
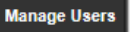
2. Give it a name that makes sense. Remember that there might be many shared tabs in your future so you will want to know fairly easily what is stored in the tab. Also remember that this is the tab name that everyone who is assigned the tab will see as a new Dashboard tab. Let's call this tab "Quick Lookups"
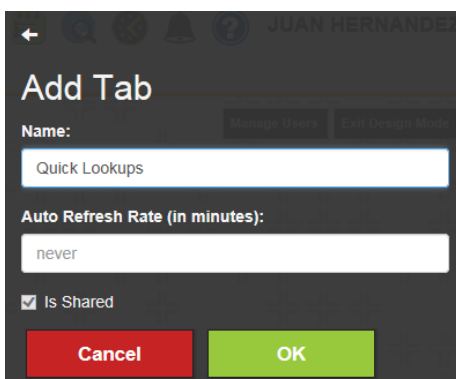
3. After hitting OK you see this:
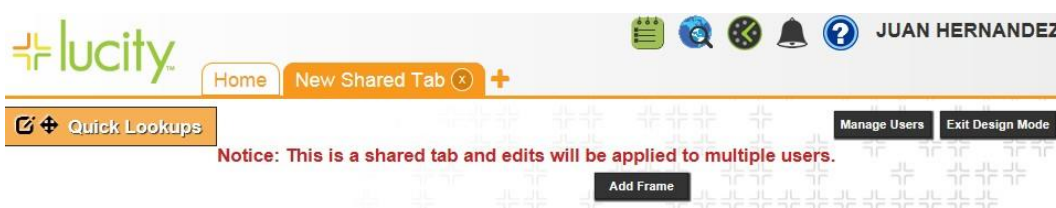
4. Assign it to users.

- Select the Manage Users button **Manage Users** .
- The "Manage Users for:" dialog opens and shows no users currently assigned.
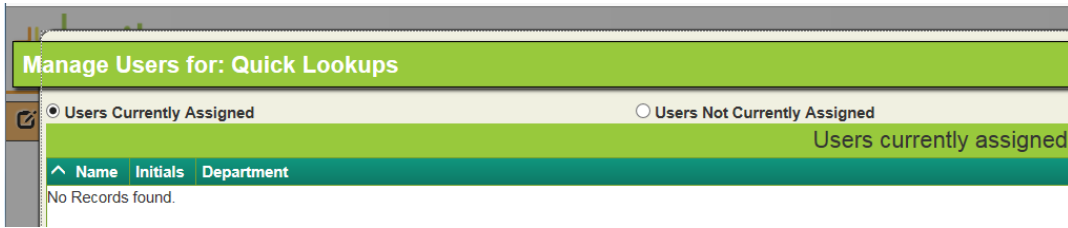
- Select the button for Users Not Currently Assigned to show a list of all users.
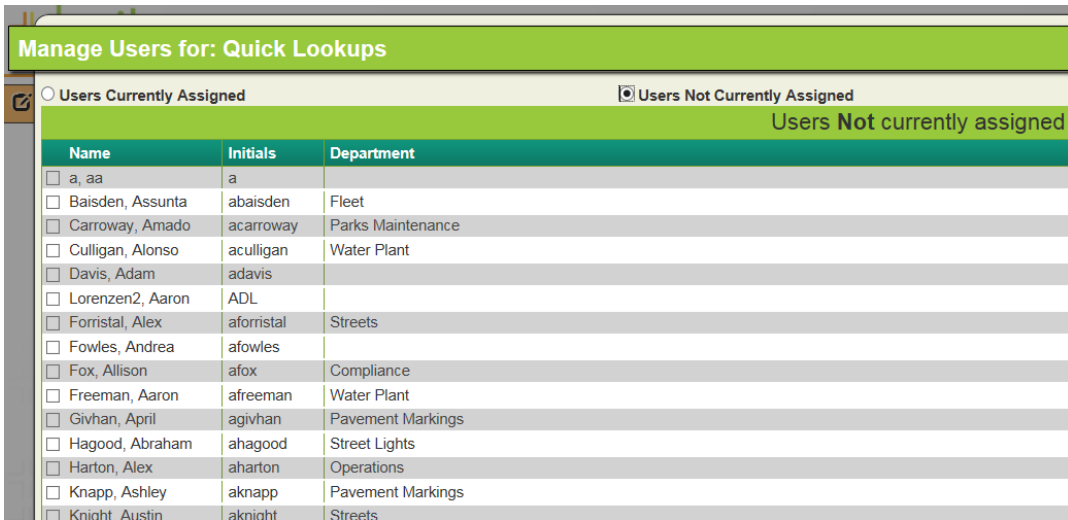
- Select the staff that you wish to have this Shared Tab by checking the box next to their name. When you have selected all the users you wish to assign to this tab, click on the Assign Selected Users button in the lower right corner.
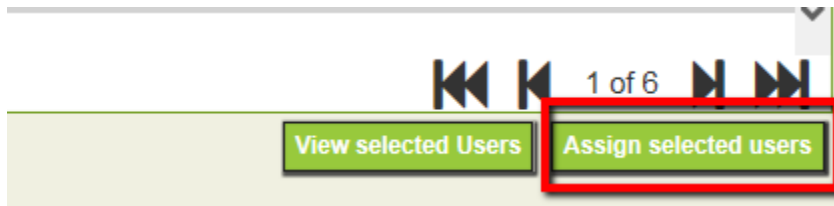
As soon as you Assign the Shared Tab to one or more users, then the users should be able to view these tabs once they refresh their dashboards. They automatically set the new dashboard tab at the end of their current list.

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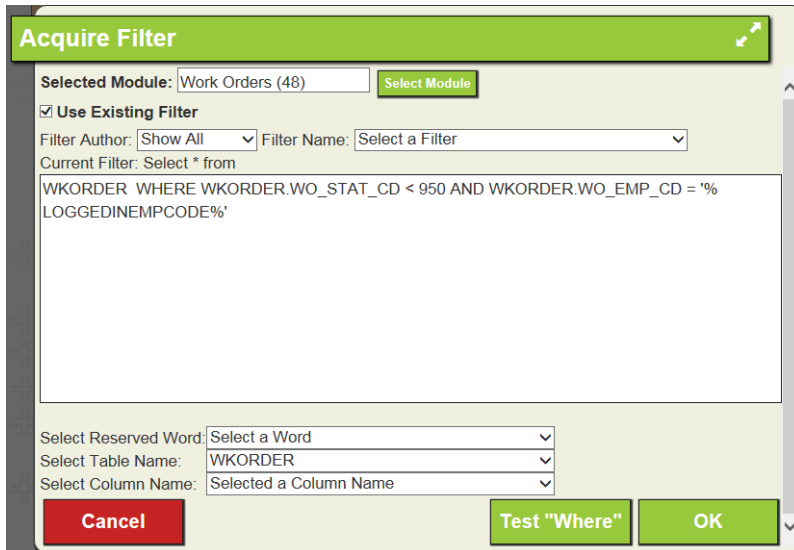
Shared Tabs with Reserved Words

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.

Create a new Shared Tab

1. Go into Design Mode
2. Select Add Tab
   - Select Create a New Tab
   - Name the Tab – Open WOs Lead Worker, check the "Is Shared" box
3. Add Frame into the Open WOs tab
   - Select Add Frame
   - Select Create a New Frame
   - Name the new frame "Open WOs"
4. 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.

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.

Filter Reserve Word list and Definitions

The following are a list of special reserved words that you can use to make you filters. These allow a filter to be dynamic. For example you can use the %CURRENTWEEK% to pull in the date range for the current week. This allows you to create a filter of work scheduled this week. This filter will return work for the week it is run without modification.

'%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).

'%SECONDHALFOFTHEMONTH%' - 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.

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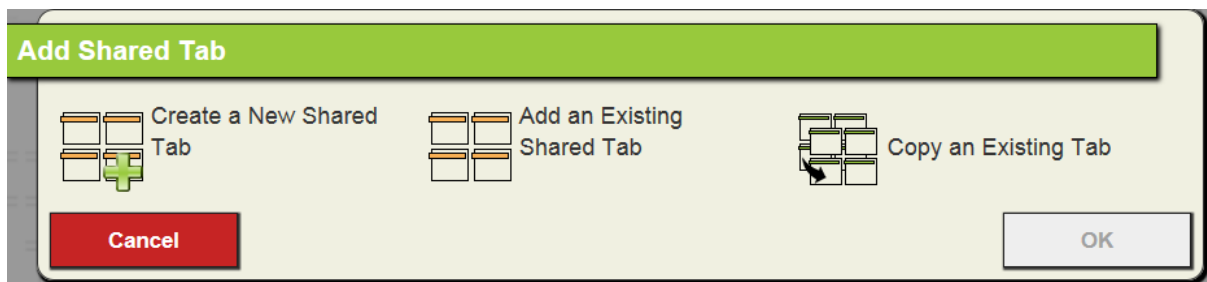
   - Add Open WOs Lead Worker
   - Add Quick Lookup
   - Make sure that they are listed in the order that you want them

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

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

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.

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.

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Web Applications – End User Training

In this section, we'll introduce you to the Lucity 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.

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.

- **View**s 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.
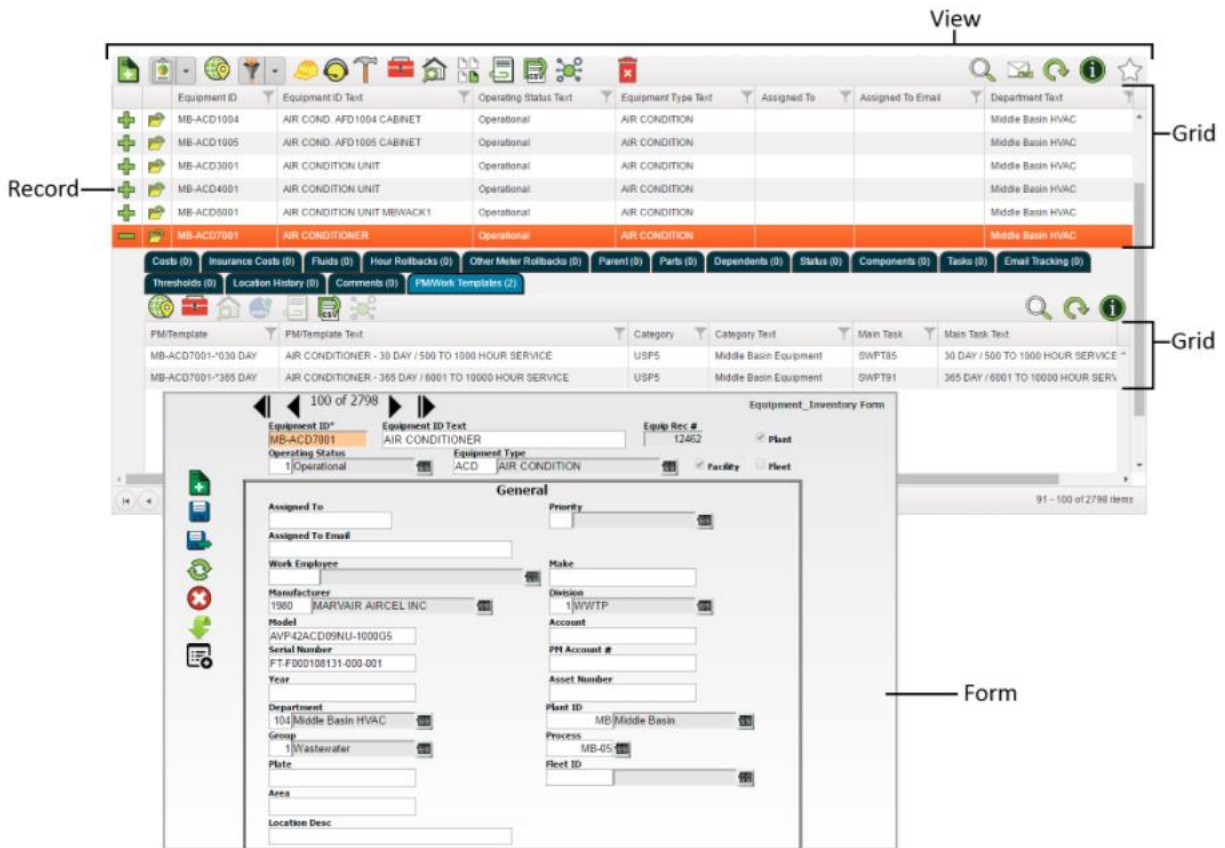
Using Custom Forms and Grids

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.

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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.

You can sort information in the View by clicking on a column heading. The first click will sort the column in ascending order, the second click in descending order and the third click will remove the order.   The System will support multiple column sorts at a time. You can also stretch column widths to see the entire text of a cell.

Using the Grids

The parent grids can display multiple child records in grid format. The types of child records included can be customized by your system administrator. You can click on each type of child record (i.e. WO Location, Assets, etc.) to access the available child grids. In the example below, the Work Order Asset child grid contains four child records. These child records each display an individual WO Asset 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.

General View Tools

These tools appear in the upper right corner of the view.

	Search	Opens a search box that allows you to search the grid. This automatically searches the current filter set looking for matches to what you typed in through all columns in the grid.
	Refresh Grid	Re-queries the database and refreshes the data on the page.
	Share with Others	Enables the user to send a link to the current *View* to other *Lucity* users, allowing them to see the same dataset. More information on sharing Views
	Information	Provides information about the Grid, View, and Module you are currently looking at.
	Mark as Favorite	Allows users to mark a specific view (and its current filter) as a favorite. When a view is marked as a favorite, the star turns yellow. ▪ To access *Favorites*, click the + button next to the application tabs.

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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).

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.

These tools appear to the upper left hand corner of the view

Icon	Name	Function
	Add	Adds a new record to the current module by launching a new Form window.
	Edit in Grid	Enables the edits within the grid. While editing in the grid the standard toolbar is disabled and you cannot expand records. • Shortcut: **CTRL + E**
	Reports	Provides access to the reports available for the current module. The drop-down arrow next to this tool displays a list of Quick Reports—a user-defined list of frequently used reports.
	Show in Map	Launches the **Lucity Web Map** (or a third-party product), then, zooms in and selects all assets, X/Y coordinates, and/or addresses found in the selected record.
	Filter	Allows users to narrow the list of records based on criteria they define.
	Create Work Order	Generates **Work Orders** for the selected records or the chosen filterset. Users may be required to select a **Default WO Category** if more than one applicable category exists.
	Create Request	Generates a **Work Request** for the selected **Inventory** record. **Note:** When users create a new **Request,** the system opens a **Request** view, if one exists. If a default view does not exist, the system still creates the **Request** in the database; however, it does not appear on screen. Instead, a notation appears above the grid indicating that the operation succeeded.
	Create PM/Template	Produces a new **PM/Template** for the selected records or the chosen filterset.
	Toolkit	Provides a range of functions, depending on the module. Such functions could include anything from sending notifications to recalculating fields.
	Property Viewer	Shows relationships between the selected record and records in other modules based on the address.
	Subsets	Enables users to create, save and load **Subsets**, which are specific groups of records.
	Documents	Allows users attach documents to a record or view attached documents. The button appears orange if the selected record has an attached document; it appears white if no documents are attached.
	Export CSV	Exports the data in the current grid (not child grids) into a .csv file and sends it to the user via email.
	External Document Link	Displays a list of documents that are linked to **Lucity** from an external document system (e.g., Falcon).
	Relationships	Displays a list of modules with records related to the selected record in the grid.

Icon	Name	Function
	Open in another View	Opens the selected record(s) in a different view. This function is normally available in child tables for **Work Order** assets or for assets from other modules that are associated with the selected asset.
	▶*Reorder*	Displays a grid that enables users to change the order that records appear in the grid. This only appears in grids where the order of the records is important to how the module works and the order is controlled by a specific attribute field.
	Delete	Erases all selected records.

Module-Specific Tools

These tools have special functionality for specific modules and only appear relevant grids.

Icon	Name	Function	Available In
	Inspection Graph	Displays observations generated during a sewer or storm pipe inspection. This button is available only in the listed inspection modules and in relevant grids.	• **Sewer Pipe** • **TV Inspection** • **Pipe Assessment** • **Storm Conduit** • **Inspections** • **Conduit Assessment**
	Tire Tools	Provides tools that enable users to manage the tires on a vehicle. This button is available only in the Fleet Inventory	• **Fleet Inventory**

> *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.*

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Editable Grids (only available pre-2017R2)

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. This feature requires Silverlight and has not yet been redesigned using HTML.

- 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.

Edit in Grid (2017R2)

Added starting in Version 2017R2, the Edit in Grid button (▣) allows users to edit information in the view in a spreadsheet format. While editing in the grid, the standard toolbar is disabled and you cannot expand or view child records. All grids have the ability to open in the **Edit in Grid** mode. This allows users to add and edit records directly in the grid and navigate fields using the keyboard. This feature streamlines the process of creating and editing multiple records. Requires the *Lucity Apps > Lucity Web > Allow Inline Editing* permission, and the General - Add, and General - Edit permissions for the modules.

Grid Elements

The *Edit in Grid* mode includes the following tools.

Icon	Tool	Description	Hotkey
	Add Record	Adds an empty *Resource* to the associated *Resource* grid. Requires the **General - Add permission** for the module. **Note:** This button is disabled if something in the grid requires underlying functions that the grids do not yet support.	**CTRL + Insert**
	Cancel	Cancels all edits made to all grids on the page and closes the page.	**CTRL + E**
	Save	Saves all edits made to all grids on the page and closes the page. Edits can also be saved by pressing **CTRL**+**SHIFT**+**S**.	**CTRL + S**
	Undo	Undoes the previous edit.	**CTRL + Z**
	Redo	Re completes the last undone edit.	**CTRL + Y**
	Delete	Deletes the *Resource* selected in the associated *Resource* grid. Requires the **General - Delete permission** for the module.	**CTRL + D**
	Information	Displays info about the Grid and a list of hotkey shortcuts that can be used in the grid.	

Using the Editable Grid

- *Sorting* - Sorting is disabled in edit mode however; the grid retains the sorting that was done before entering edit mode.

- *Filtering* - Filtering is disabled in edit mode however; the grid retains the filtering that was done before entering edit mode.

- *Navigation* - Use arrow keys to move from cell to cell or tab to jump to the next editable cell.

Hot Keys

Use the for a complete list of hotkeys to help with navigating the grid and entering information.

Hotkeys

Key	Function
Left, Right, Up, Down	Navigate All Cells
Tab, Shift + Tab	Navigate Editable Cells
Enter, Shift + Enter	Navigate Vertically
Home, End	Start or End of Row
Ctrl + Home, Ctrl + End	Start or End of Data Set
Ctrl + E	Begin/Cancel Edit Session
Ctrl + Insert	Add New Record
Ctrl + S	Save
Ctrl + D	Delete
Ctrl + Z	Undo
Ctrl + Shift + Z, Ctrl + Y	Redo
F9	Open Popup
	• Esc - Close
	• Up/Down - Navigate Grid Vertically
	• Enter - Select
Space	Set Current Date/Time or Expand Drop Down List
Ctrl + C	Copy
Ctrl + V	Paste

OK

Editable Grid Fields

- **Picklist fields** - Click in the field for a filterable drop down list of valid records. Or click the 📋 for a picklist pop-up.

- **Date fields** - Click the 📅 field for a calendar to select from.

- **Required fields** - These are highlighted in light orange.

- **Read Only fields** - These fields are greyed out.

- **Restricted fields** - If a user does not have permission to edit restricted fields, they will be able to edit such fields in the editable grid; however, their edits to those fields will not be saved.

Review Grid Edits

While editing icons will appear to the left of each record that is added or edited to indicate which records were edited.

	Added Record	Appears next to a record that was added during this edit session.
	Edited Record	Appears next to a record that was edited during this edit session. Click on this icon to display the review screen and allow you to view the edits made to the record.

Edit Review Screen

Click the ![edit icon] button next to an edited record to see the edit review screen. This screen will show all *Original* state of the record compared to the *Current* state.

- Edits are highlighted in green.
- Click the ![undo icon] next to an edited field to undo the edit.
- Click **Revert All** to undo all changes.
- Click **OK** to close the edit review window.

Reports ![reports icon]

The Web Report tool is well documented on the Lucity YouTube channel and can be found here: https://www.youtube.com/watch?v=rqRkqhapwU0

1. The Report Button is divided into two portions. The left portion opens up the report dialog. The right portion opens the list of the user's Quick Reports.

2. Click the left portion of the Reports button ![reports icon] to open the Reports dialog. The following window will be displayed:

- This dialog displays each report by name. Farther to the right, it also lists a brief description of each report, the Quick Report Type, the Group Name and the report file name. The first column indicates if the report is a Quick Report for the current user.

- In the upper left, a drop down for Report Group was added for Work Orders only.   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 the first time the dialog is open. Thereafter, if the Report Group is changed, then the last used Report Group will be the default the next time it is open. Report Groups are managed by the Manage Report Group button in the upper right.

- Note that the reports listed here include your organization's custom reports as well as the standard Lucity reports.

3. To limit the record selection included in the report, use the radio buttons as follows:

   o **All Records** – The report will include all records in the module.

   o **Current Record Only** – The report will only include the information on the current record.

   o **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.

4. To view a report, highlight a report name and click *View PDF* or *View HTML*. The report will be displayed in a separate window. The default number of pages that a .pdf report can show by default is 10. This value can be modified in the Web Performance tab of the System Settings option in the Lucity Admin program.

5. As long as the user has rights, they can Add, Edit, Update, Download, or Delete a report or add reports to the Quick Report list.

   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:

Edit Report

Report Name:

Average Open Time for Work Orders

Report Description:

Selects WO records with Status>950 and calculates days open by the difference in WO End Date and WO Start Date.

Report Location and Filename: Reports\Work\WOAvgTmOpenWeb.rpt

Optional Report Group: Monthly

Cancel   Save

- Click *Save* when you have finished making your edits.

- 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

Filtering enables *Lucity* users to quickly extract certain records from a grid. Unlike sorting, filtering doesn't just reorder the records; it actually hides the rows or columns containing data that do not meet the filter criteria the user defines.

A filter button appears in every column header to allow users to filter the data in the grid based on that column. Users may filter the grid on multiple columns at the same time to quickly filter records, rather than using the more robust *Filter Builder.*

How To Use the Column Filter Function

1. Select a column to filter.

2. Click on the column's filter button. The following pop-up appears:
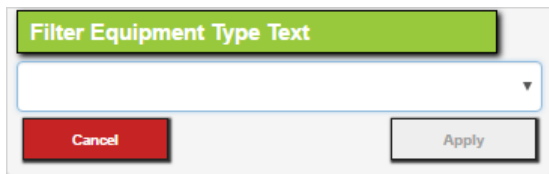
3. Click the drop-down and select the desired filter option.
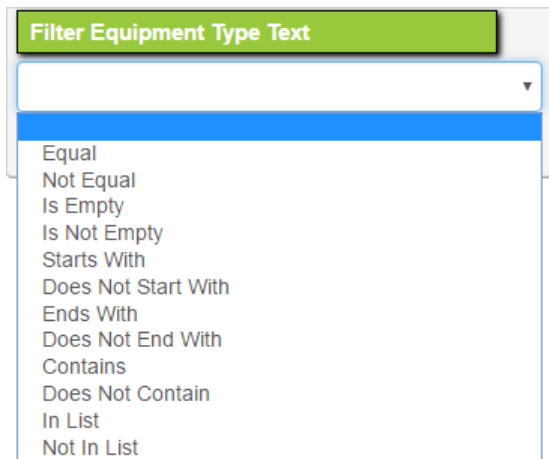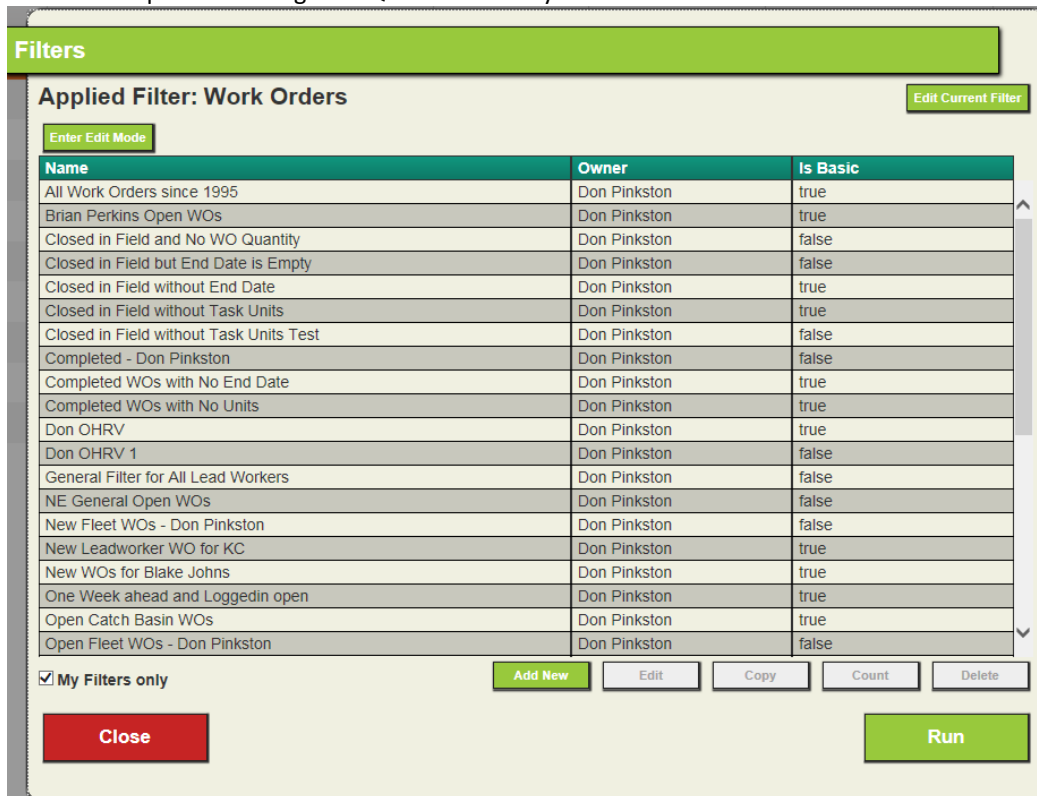
4. A box appears below the filter option. Enter the criteria to filter on in that box and click **Apply**. The tool displays only the records that match the criteria for that filter AND all other filters set for other columns.

5. After filter criteria is defined for a column, the filter icon is highlighted in orange in that column. Click the orange filter icon to display the current settings.

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Filters

A Filter helps you narrow your search for a specific record or set of records. A movie exists on the Lucity YouTube video channel that documents how the filter works: https://www.youtube.com/watch?v=WmpSQJccyC8

When you click the Filter button [filter icon] the Filter dialog will appear. Each filter lists the person who created it, the name of the filter, and whether the filter is **Basic (True)** or **Advanced (False)**. Basic filters are created with the Lucity Filter Builder and can be produced by most users. Advanced filters are written as SQL statements, and therefore require knowledge of SQL and the Lucity database structure.

Applied Filter	Displays the name of the filter currently applied to the module. If the filter has yet to be saved, it will say "New Module Filter."
Edit Current Filter	Opens the **Applied Filter** in edit mode.
Enter Edit Mode	Opens the **Filters** grid in edit mode, which enables a user to edit the filter names. • [icon] Users that do not have the **Filter/Browse - Edit Others** permission can only edit the names of filters that they created.
Filters grid	Lists the filters created and saved in this module. Each record lists the name of the filter, the person who created it, and whether the filter is **Basic (True)** or **Advanced (False).** • [icon] Click on a column header to sort the records. This icon indicates the column by which the data is sorted.
My Filters Only	When checked, displays only those filters created by the current user. Uncheck the box to show all saved filters for this module.
Add New	Opens a blank **Filters Editor** screen.

Edit a Filter	Opens the currently selected filter in the Edit screen and lets the user modify the filter.
Copy Filter	Provides a way to duplicate a filter. • 🔐 If the user has the **Lucity App Admin** permission, this tool allows him or her to copy a filter to multiple users.
Count	Provides a pop-up that shows the number of records the selected filter will load.
Delete a Filter	Deletes the selected filter.

How to add a filter and using the Basic Filter Builder

The *Basic Filter Builder* enables users to create a filter one step at a time. The process begins by selecting the module or child module on which to base the filter. Then, the user chooses the field to apply the filter to and the condition the filter should use to base its results (ie =, >, <, etc...). Finally, the user enters the factor he or she wants the filter to identify. Multiple fields can be filtered at once.
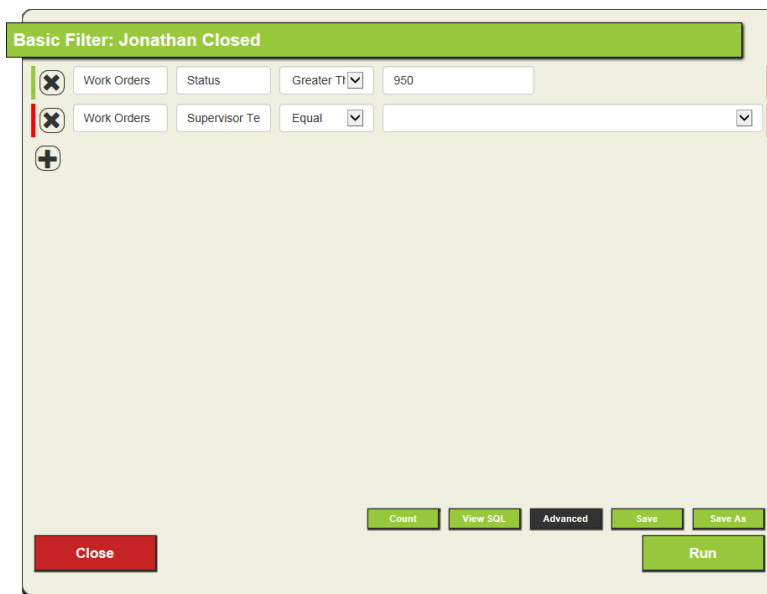
Count	Displays the number of records found by the filter the user is building.
View SQL	Displays the SQL statement represented by the selections in the *Filter Builder*.
Advanced	Converts the filter to an **Advanced** filter and opens the *Advanced Filter Editor*.
Save	Stores the filter for future use. (This button appears only when editing a previously saved filter.)
Save As	Stores the filter for future use while setting the name of the filter.
Run	Executes the filter.

How to use the Filter Builder
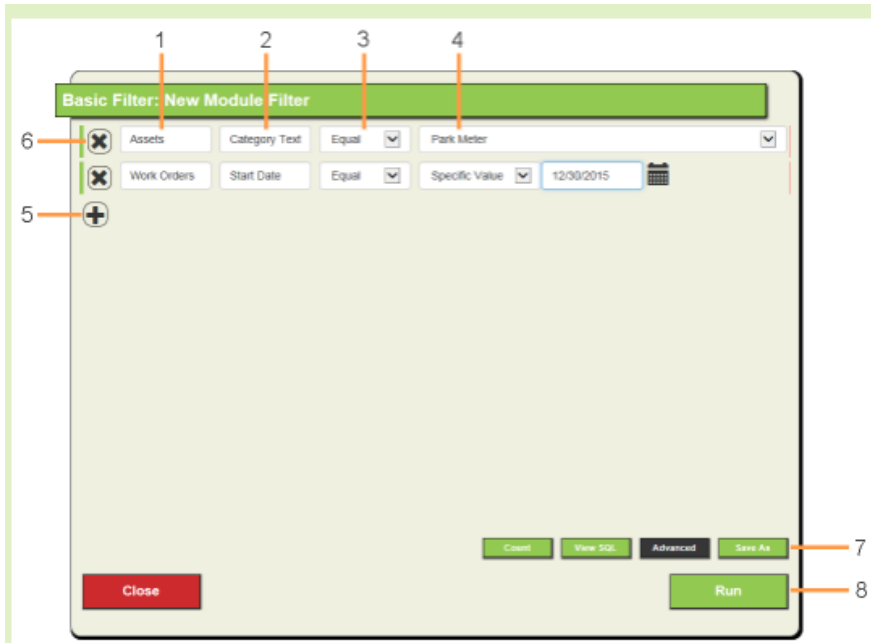
- Click **Add New** or Select a Filter and click **Edit Filter**.

- The Filter Builder will appear:

- Click the ⊕ to add filter criteria. In the first drop-down box, select the module component upon which to base the filter. (This component could either be the module or a child module.)
  - *Example:* In a *Work Order*, filter on the *Work Order Assets.*

- Use the second drop-down box to select the field in the selected module upon which to filter. Another drop-down box appears.
  - *Example:* Filter on the *Asset Type Text* field.

- Use the third drop-down box to select a filter operator. A blank field appears on the next line.
  - *Example:* Operators are parameters like: **Starts With, Ends With, Equal**, etc.

- In the blank field, enter the filter criteria; that is, the term or value that you wish to include in, or exclude from, the results.
  - **Number and Text fields** - a drop-down list is provided if the filter operator is *Equals*, *Not Equals*.
  - **Date fields** - An additional drop-down appears if the filter operator is *Equals*. This allows you to indicate that you would like to enter a specific value, or select a reserved word from the list.
  - **In List/Not In List** - After selecting this operator you must click the ☰ button to select a list of values.

- To filter on an additional field, click the ⊕ button. Repeat steps 1-4 with the new drop-down fields.

- To remove the filtering on one field, click the ✖ next to that row.

- To save the filter, click **Save As**. The following pop-up appears:

- Enter a name for the filter. Click **Save**.

- Click **Run** to immediately run the filter.
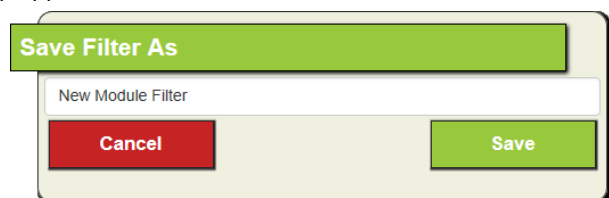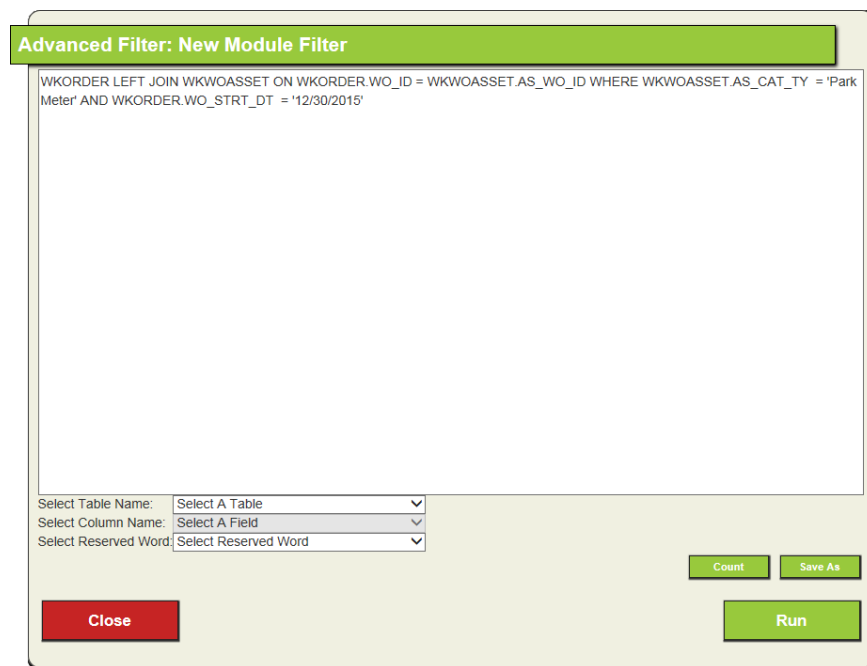
Additional Information

1. Each added field creates an "And" statement and serves to further limit the filterset.
2. If the same field is added to the filter multiple times, it creates an "Or" statement.
   - ***Example:*** Users can use something like ***Problem Contains "xyz"***, ***Problem Contains "abc"***. The resulting filterset will include all ***Problems*** that contain either "xyz" or "abc".
   - ***Example 2:*** Users ***should not*** use something like: ***Problem Does Not Contain "xyz"***, ***Problem Does Not Contain "abc"***. The resulting filterset will contain all possible ***Problems*** (all ***Problems*** that do not have "xyz" or all ***Problems*** that do not have "abc").
3. Any filter created using this ***Filter Builder*** dialog are designated as a "Web Filter." These filters are only available for use in the ***Lucity Web*** application; they are not added to the filters in ***Lucity Desktop***.

Advanced Filter Editor

Users should have a working knowledge of SQL (Structured Query Language) before attempting to use **Advanced** filters. For most users, the ***Filter Builder*** is sufficient.

Count	Displays the number of records found by the filter currently being created/edited.
Save As	Stores the filter for future use while setting the name of the filter.
Run	Executes the filter.

How to convert a Basic Filter into an Advanced Filter

1. Select a **Basic** filter from the filter list.

2. Click the **Edit** button.

3. In the *Filter Builder,* click the **Advanced** button. The following warning appears:

Entering Advanced - Unsaved Changes

You are about to enter advanced mode with unsaved changes. These changes will be discarded should you close advanced mode without saving. Once saved in advanced mode this filter will no longer be considered a basic filter.

Cancel   Continue
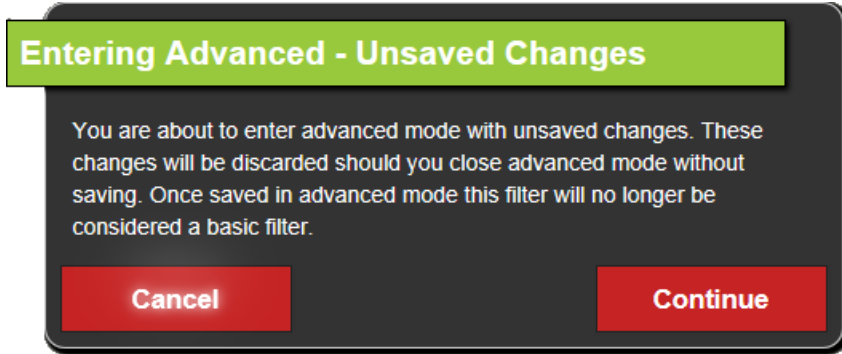
4. Click **Continue**. The *Advanced Filter Editor* opens.

5. Modify the filter as needed.

6. Click **Save As**. The following pop-up appears:

Save Filter As

New Module Filter

Cancel   Save
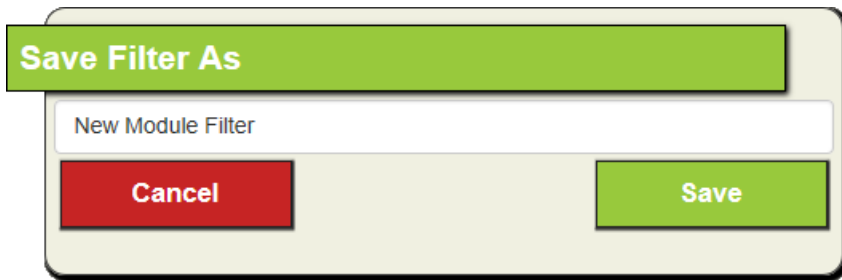
7. Enter a name for the filter.

8. Click **Save**.

Notes:_____

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How to use the Advanced Filter Editor

- Enter a SQL statement into the text box, starting with the table from which to select records. The statement will always include **Select * from** at the beginning.
  - Use the **Select Table Name** drop-down to select a table related to the desired module.
  - Use the **Select Column Name** drop-down to select a field from that table. Doing so will insert **tablename.fieldname** into the SQL statement.
  - Use the **Select Reserved Word** drop-down to insert a [reserved word](#) into the SQL statement.
- To save the filter, click **Save As**.

  Note: Filters saved from the *Advanced* tab will be saved as **Advanced** filters. **Advanced** filters cannot be edited using the *Basic Filter Builder*.

- To immediately run the filter, click **Run.**

Reserved Words

Reserved words are used to add data to a filter based on when, and by whom, the filter is run.

Example: A user wants a filter of all the work that was completed in the last week. He creates a filter that says:

SELECT * FROM WKORDER WHERE WKORDER.WO_END_DT >= '6/18/2012' AND WKORDER.WO_END_DT <= '6/22/2012'

However, this query statement would be out of date the next week, requiring the user to adjust the dates.

So, the user rewrites the statement using the **%PREVIOUSWEEK%** reserved word:

SELECT * FROM WKORDER WHERE WKORDER.WO_END_DT = %PREVIOUSWEEK%

The new filter displays all work orders with an end date that falls within the seven days previous to it being run.

Note: When using reserved words, enter them in all uppercase letters and enclose them in percent symbols (%)

Available Reserved Words

The following is a list of all the **reserved words** available in *Lucity Web.*

'%LOGGEDINUSERID%' - Returns the currently logged in user's *Login ID.*

- Example – When Josh runs the filter: SELECT * FROM WKORDER WHERE WKORDER.WO_EMP_TY = '%LOGGEDINUSERID%'

- It becomes - **SELECT * FROM WKORDER WHERE WKORDER.WO_EMP_TY = 'JOSH'**

'%LOGGEDINEMPCODE%' - Returns the currently logged in user's *Employee ID*, which is found in the *EM_EMPL_CD* field in the *WKUEMP* table. When used in a filter, the system replaces the reserved word with the *Work Employee Code* of the currently logged in user.

Requirements - An agency must own the *Work* module to use this string. Also, the logged in employee must have his or her *Login ID* associated with an *Employee* record in the **Work Flow Setup > Employees** module.

- Example – When user Josh (login ID – Josh, Employee Code = JoshL) runs the filter: SELECT * FROM WKORDER WHERE WKORDER.WO_EMP_CD = '%LOGGEDINEMPCODE%'

- It becomes: **SELECT * FROM WKORDER WHERE WKORDER.WO_EMP_CD = 'JoshL '**

'%FISCALYEAR%' - Returns the *Current Fiscal Year* from the *Desktop* application's *Planning and Budgeting, Fiscal Year* module.

Requirements - An agency must own the *Work* module to use this string.

- Example – On 6/27/2014, a user runs the filter: SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%FISCALYEAR%'

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '01/01/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '01/01/2015 12:00 AM'**

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

- Example – On 6/27/2014, a user runs the filter: SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTYEAR%'

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '2014-01-01' and EFEQUIP.GE_CUR_DT < '2015-01-01'**

'%CURRENTQUARTER%' - Inserts the current quarter.

- Example - On Friday 6/27/2014, a user runs the filter: SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTQUARTER%'

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.GE_FL_ID = EFFLEET.FL_ID WHERE EFEQUIP.ge_cur_dt >= '04/01/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/01/2014 12:00 AM'**

'%CURRENTMONTH%' - Inserts the current month.

- Example - On Friday 6/27/2014, a user runs the filter: SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTMONTH%'

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/01/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/01/2014 12:00 AM'**

'%CURRENTWEEK%' - Looks at the current date and inserts the dates for the Sundays before and after the current date.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK%'**
- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/29/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/06/2014 12:00 AM'**

'%CURRENTWEEK1%' - Looks at the current date and inserts the dates for the Sundays before and after the current date. (Results are identical to those using the previous reserve word.)

- Example - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK1%'**
- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/29/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/06/2014 12:00 AM'**

'%CURRENTWEEK2%' - Looks at the current date and inserts the dates for the Monday in the same calendar week and the next Monday.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK2%'**
- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/30/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/07/2014 12:00 AM'** - In this example, the user runs the filter on a Monday; so, the system returns records from the 'previous' Monday (12 a.m. that same day, 06/30) to 12 a.m. the following Tuesday, 07/07 (which catches all of Monday, 7/6)

'%CURRENTWEEK3%' - Looks at the current date and inserts the dates for the Tuesday in the same calendar week and the next Tuesday.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK3%'**
- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '07/01/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/08/2014 12:00 AM'**

'%CURRENTWEEK4%' - Looks at the current date and inserts the dates for the Wednesday in the same calendar week and the next Wednesday.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK4%'**
- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '07/02/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/09/2014 12:00 AM'**

'%CURRENTWEEK5%' - Looks at the current date and inserts the dates for the Thursday in the same calendar week and the next Thursday.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK5%'**
- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '07/03/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/10/2014 12:00 AM'**

'%CURRENTWEEK6%' - Looks at the current date and inserts the dates for the Friday in the same calendar week and the next Friday.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK6%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '07/04/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/11/2014 12:00 AM'**

'%CURRENTWEEK7%' - Looks at the current date and inserts the dates for the Saturday in the same calendar week and the next Saturday.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTWEEK7%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '07/05/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/12/2014 12:00 AM'**

'%CURRENTDAY%' - Inserts the current 24-hour period. This is a range from 12:00 AM of the current day to 12:00 AM of the next day.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%CURRENTDAY%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/27/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '06/28/2014 12:00 AM'**

'%PREVIOUSYEAR%' - Looks at the current date and inserts January 1 of the previous year to January 1 of the current year.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%PREVIOUSYEAR%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '01/01/2013 12:00 AM' AND EFEQUIP.ge_cur_dt < '01/01/2014 12:00 AM'**

'%PREVIOUSMONTH%' - Looks at the current date and inserts the first date of the previous month and the first date of the current month.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%PREVIOUSMONTH%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '05/01/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '06/01/2014 12:00 AM'**

'%PREVIOUSWEEK%' - Looks at the current date and inserts the dates of the previous week, Sunday to Sunday.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%PREVIOUSWEEK%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/15/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '06/22/2014 12:00 AM'**

'%PREVIOUSDAY%' - Inserts the day previous to the current day.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%PREVIOUSDAY%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/26/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '06/27/2014 12:00 AM'**

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

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%FIRSTHALFOFTHEMONTH%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/01/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '06/16/2014 12:00 AM'**

'%SECONDHALFOFTHEMONTH%' - Inserts the second half of the month (days 16-31).

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%SECONDHALFOFTHEMONTH%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/16/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/01/2014 12:00 AM'**

'%ONEWEEKAHEAD%' - Inserts the current day, plus seven future days.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%ONEWEEKAHEAD%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/27/2014 12:00 AM' AND EFEQUIP.ge_cur_dt < '07/05/2014 12:00 AM'**

'%TWOWEEKSAHEAD%' - Inserts the plus 14 future days.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%TWOWEEKSAHEAD%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt >= '06/27/2014 12:00 AM'' AND EFEQUIP.ge_cur_dt < ''07/12/2014 12:00 AM'**

'%ONEWEEKAHEADANDBEFORE%' - Inserts code to encompass all previous time, plus one week in the future. For example, this string could be used to query for all existing open *Work Orders,* as well as those that are open/due in the next week.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%ONEWEEKAHEADANDBEFORE%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt <= '07/05/2014 12:00 AM'**

'%TWOWEEKSAHEADANDBEFORE%' - Inserts code to encompass all previous time, plus two weeks in the future.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt = '%TWOWEEKSAHEADANDBEFORE%'**

- It becomes - **SELECT * FROM EFEQUIP LEFT JOIN EFFLEET ON EFEQUIP.ge_fl_id = EFFLEET.fl_id WHERE EFEQUIP.ge_cur_dt <= '07/15/2014 12:00 AM'**

'%LAST(X,Y)%' - Inserts a range of dates where the *Last Date* is calculated as the **Current Date - X days** and the *First Date* is calculated as the **Last Date - Y days**.

- Example - On Friday 6/27/2014, a user runs the filter: **SELECT * FROM WKORDER WHERE WKORDER.wo_mod_dt = '%LAST(1,5)%'**

- It becomes - **SELECT * FROM WKORDER WHERE WKORDER.wo_mod_dt >= '6/21/2014' AND WKORDER.wo_mod_dt <= '6/26/2014'** The current date is 6/27. The reserve word goes back 1 day to 6/26 to find the end of the date range. It then goes back 5 days to find the beginning of the date range, 6/21.

'%NEXT(X,Y)%' - Inserts a range of dates where the *First Date* is calculated as the **Current Date + X days** and the *Last Date* is calculated as the **Current Date + Y days**.

- Example - On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM WKORDER WHERE WKORDER.wo_mod_dt = '%NEXT(0,10)%'**

- It becomes - **SELECT * FROM WKORDER WHERE WKORDER.wo_mod_dt >= '6/30/2014' AND WKORDER.wo_mod_dt <= '7/10/2014'** The current date is 6/30. The reserve word goes forward 0 days to find a beginning date of 6/30. It then goes forward 10 days to find the end date of 7/10.

'%TODAY%' - Inserts today's date.

- Example – On Monday, 6/30/2014, a user runs the filter: **SELECT * FROM WKORDER WHERE WKORDER.wo_mod_dt = '%TODAY%'**

- It becomes - **SELECT * FROM WKORDER WHERE WKORDER.wo_mod_dt = '6/30/2014'**

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.

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".
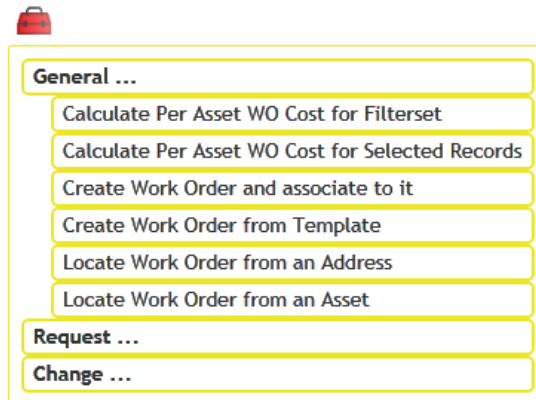
2. A sample Toolkit option is displayed below; however, many more functions are offered that vary by form. At this time, the Toolkits are not customizable.

- The example below comes from the Work Order Asset Grid. Here, we've selected the tool to Populate Completion Date. Users can then enter the completion Date.

Populate Completion Date | Selected Record(s)

Completion Date   Completion Time

[   ] 🗓   HH : MM AM

Cancel   OK

3. 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 Lucity 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

10746 LEE BLVD

- **+** Recents
- **−** General (1)
  - **−** Customer Addresses (1)
    - HF2513-15417
- **+** Environmental
- **+** Sewer
- **+** Storm
- **+** Environmental Compliance
- **+** Transportation
- **+** Water
- **+** Electric
- **+** Tree and Park
- **+** Plant and Equipment
- **+** Facility
- **+** Refuse and Recycle
- **+** Work

Close
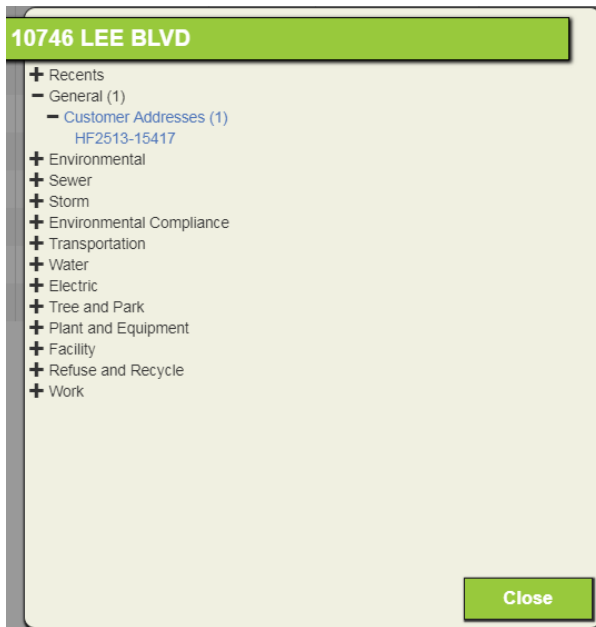
Launch Desktop Records –

As of Version 2017, a user can no longer launch the Desktop application from the web.

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.

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Subsets

This tool allows users to either create or load subsets. A subset is simply a list of Asset IDs that the user creates via a filtered data set or by highlighting one or more assets from the map. A video explaining how the subset works can be viewed from here: https://youtu.be/xacPfKSpvzQ

Loading a subset can be performed to either filter a record set (or loading it into a filter set to further reduce that filter set). It can also be used to load a list of records into a grid of assets.
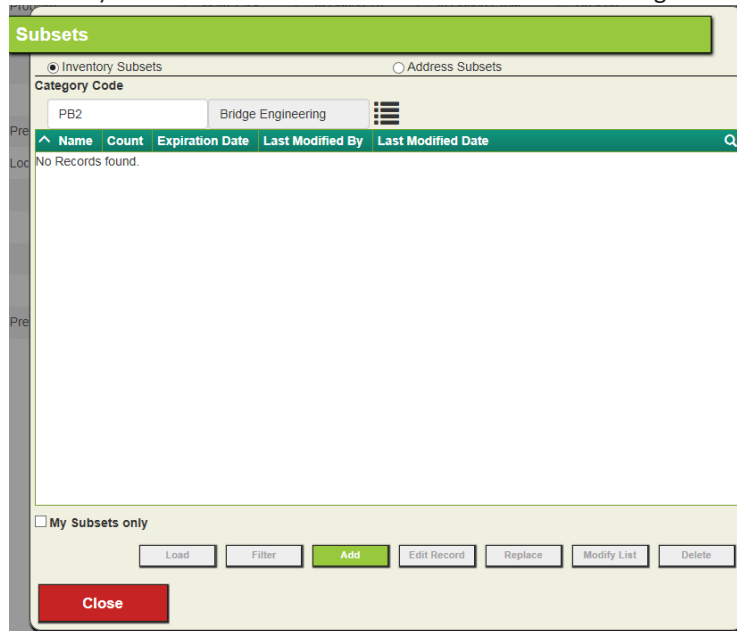
Inventory/Address Subsets	Allows the user to display only *Inventory Subsets* (sets of *Asset* records*)* or *Address Subsets* (sets of *Address* records).
	Note: *Address Subsets* work only with modules that support addresses.
Change Selected Category	Enables users to view only those subsets for the *Asset Inventory* whose *Work* category is selected.
	Note: This option appears only in *Work* modules. Subsets from any *Asset Inventory* can be loaded into a *Work Order*.
My Subsets Only	Displays only the subsets created by the current user.
Load	Loads an existing subset (clears out any filters currently being used and displays all records in the subset).
Filter	Loads the subset into the current filter. Any records that are part of the subset but are not also part of the filter are excluded.
Add	Creates a new subset.
Edit Record	Allows users to edit the subset's **Name** and **Expiration Date**.
Replace	Replaces the selected subset with a new one.
Modify List	Allows users to sort and change the contents of the subset.
Delete	Deletes the selected subset.

As an example, say you did a filter on water hydrants painted between 1/1/2015 and 12/31/2015 and it returned 15 work orders. You could then create a subset of hydrants off of that filter set which would include a list of all unique hydrants included in that filter set. You can name this subset or it will automatically provide it a unique name. Also, this subset can last forever (until you delete it) or you can set it up so that the subset only lasts a set period of time (say 10 days) and then it automatically gets deleted. Once created, the subset can be loaded into the map, another module (say in Hydrants to get this unique list of hydrants) or in an asset grid (like in work orders or PM/Templates).

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.

Document Control

This tool allows users to view documents that are attached to an asset and attach new documents – more information in video format can be accessed here: https://youtu.be/jk8G3T0DXVw?list=PL6gNKzCUXa1gmEkZm0X23UmuvXwDzoDcZ. To use this tool, select an asset in the grid and then click the document button . The following window will appear:

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Documents grid	Lists the documents attached to the selected record. ▪ 🔍 Allows the user to search for a **Document.** ▪ Click on a column header to sort the records. This icon indicates the column by which the data is sorted.
Add document	Attaches a document to the selected *Lucity* record.
Upload document	Uploads a copy of one or more documents to the web server and attaches them to the selected *Lucity* record.
Open	Opens the selected document using the computer's default program for that type of document.
Information	Displays information about the connection to the document.
Edit	Edits the connection between the *Lucity* record and the selected document. (This tool does not edit the document itself.)
Delete	Removes the connection between the *Lucity* record and the selected document. • If a document was attached from a network location, the file remains there. Although the document's connection to the Lucity record is removed, the file is not deleted from the network. • If a document was uploaded to the web server and attached to the record, the document will be deleted from the web server.

Document Properties

Path	Displays the network path to the document's location.
Description	Explains the nature of the document.
Carry Over to Work Order	When enabled, tells the system to link the document to any *Work Orders* created for the record associated with the document.
Always Open Document Directly	When disabled, tells the system should display a link to the document location, rather than automatically opening the document. This option is useful for large documents.

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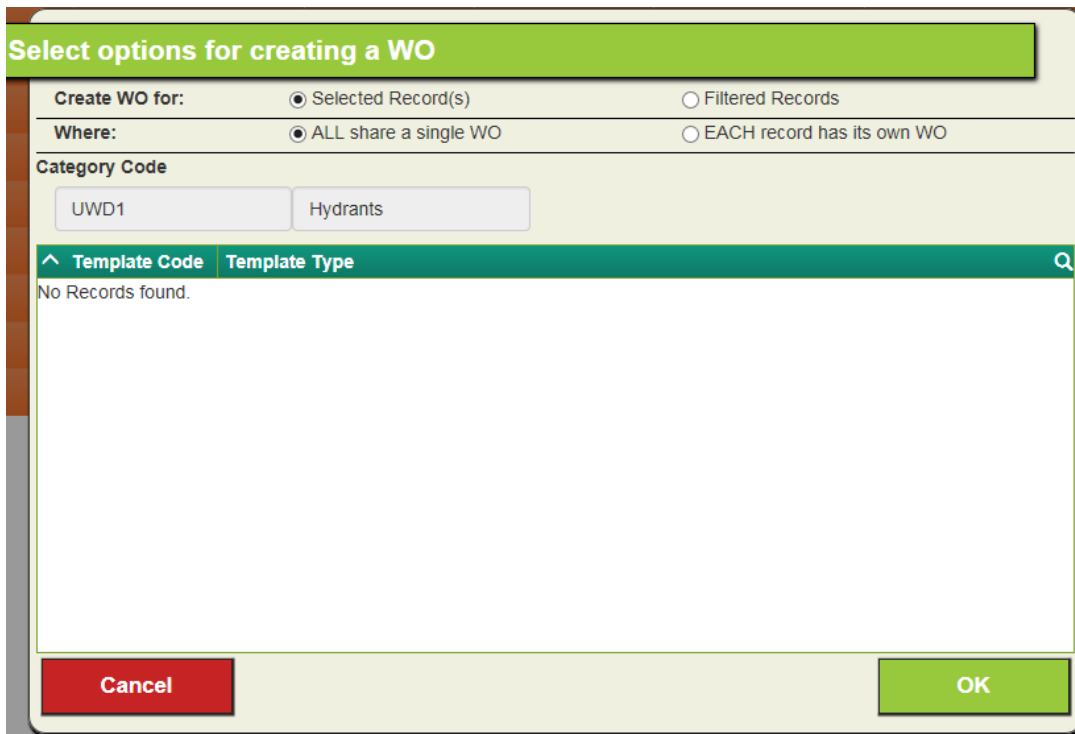
Create Work Order

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 creating a WO

Create WO for:	⦿ Selected Record(s)	○ Filtered Records
Where:	⦿ ALL share a single WO	○ EACH record has its own WO

Category Code

UWD1	Hydrants

∧ Template Code	Template Type	🔍
No Records found.		

Cancel   OK
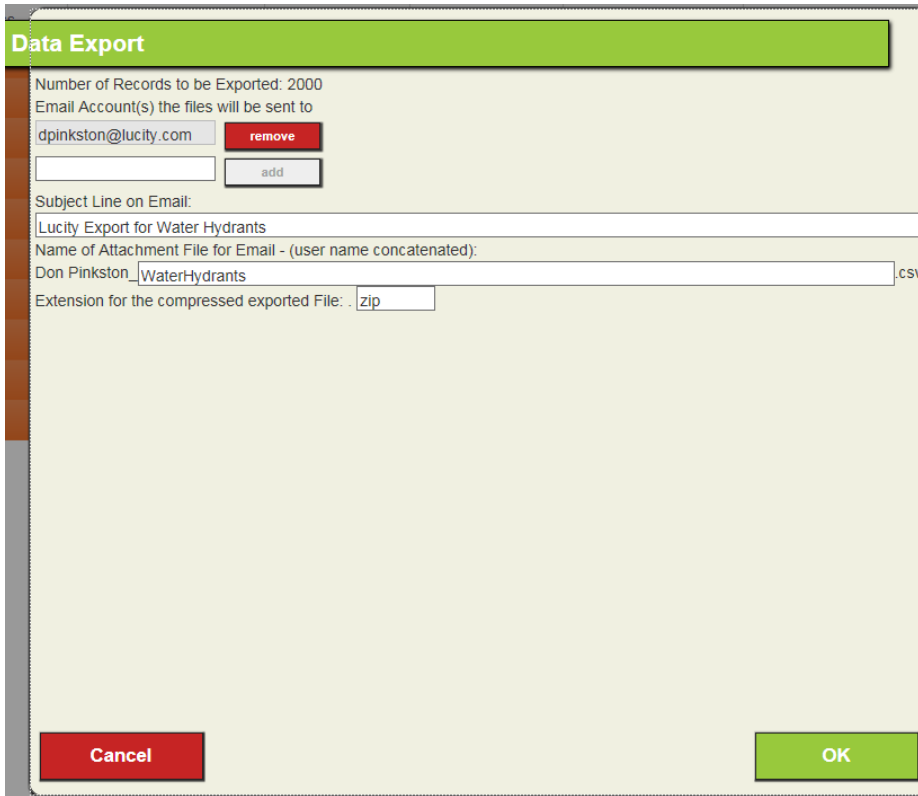
4. Choose whether the work order will be created against the **Selected Records** or against the entire set of **Filtered Records**.

    - If there is more than one selected or filtered record the **Where** section will be visible.

    - 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. If a list of templates is available for selection, then the user can select a template to use with the work order. Then, to create the work order the user clicks **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:

Data Export

Number of Records to be Exported: 2000
Email Account(s) the files will be sent to

| dpinkston@lucity.com | remove |

| | add |

Subject Line on Email:

Lucity Export for Water Hydrants

Name of Attachment File for Email - (user name concatenated):

Don Pinkston_ WaterHydrants   .csv

Extension for the compressed exported File: . zip

Cancel   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.

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Form Buttons

Each form has a series of buttons that are useful.

Sewer Pipe Inventory Form
◀| ◀ 191 of 462 ▶ |▶

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.

Flow Basin
D822512
Owner
1 Public
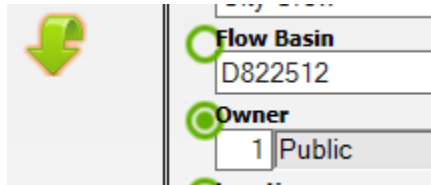
The carry over button provides an empty circle for every editable field and allows the user to select one or more fields. When selected, those fields get carried over to the next new record that is added.

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Web Applications – View, Grid, & Form Setup

Now that you understand how the Lucity 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 Lucity 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!

Table of Contents

Administrative User Interface

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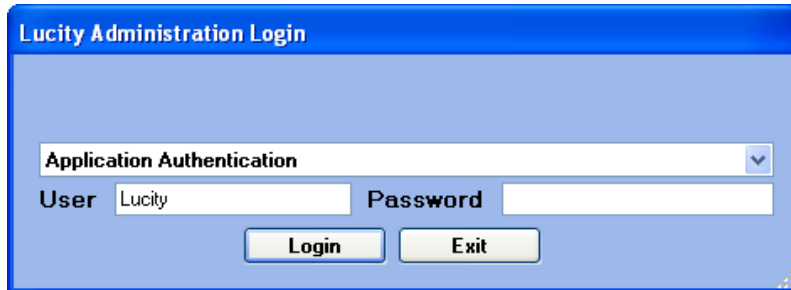
After logging in, you'll see the User Interface Administration screen and main menu. These menu options contain the following:

- 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
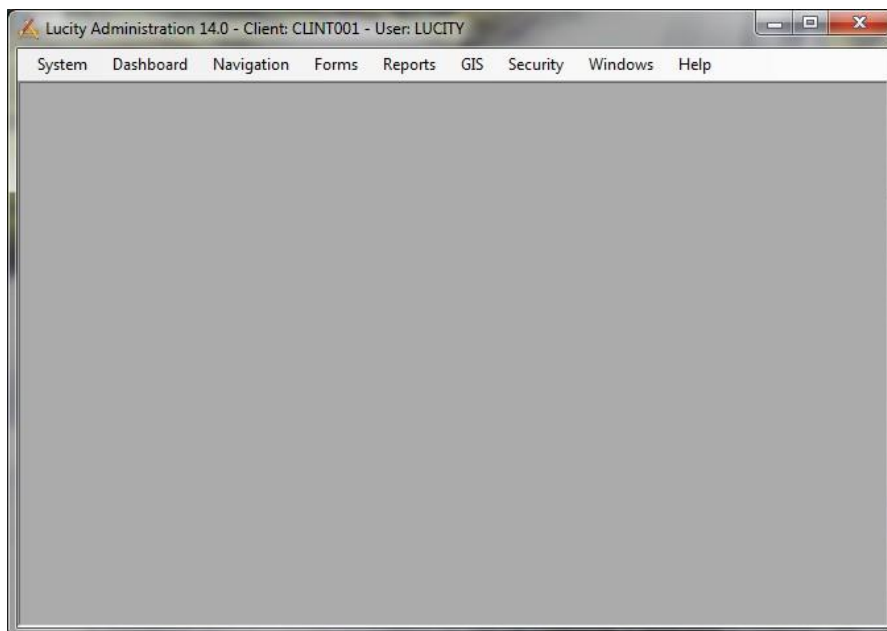
Creating Custom Forms

The Lucity 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 Lucity 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 Lucity 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.

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:
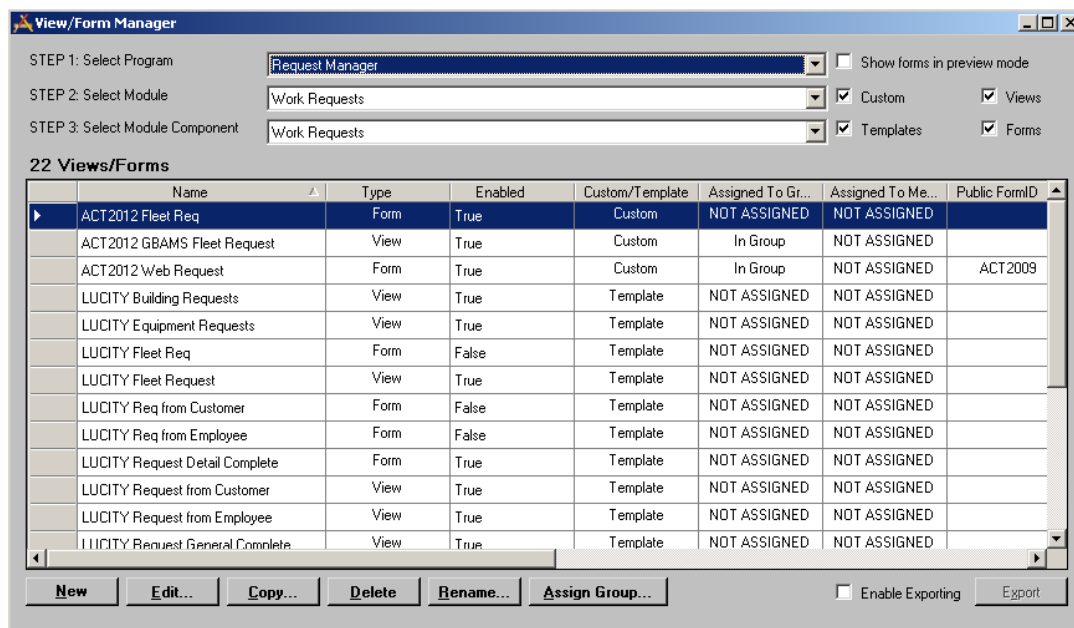
Lucity prompts you to follow the steps:

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.

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.
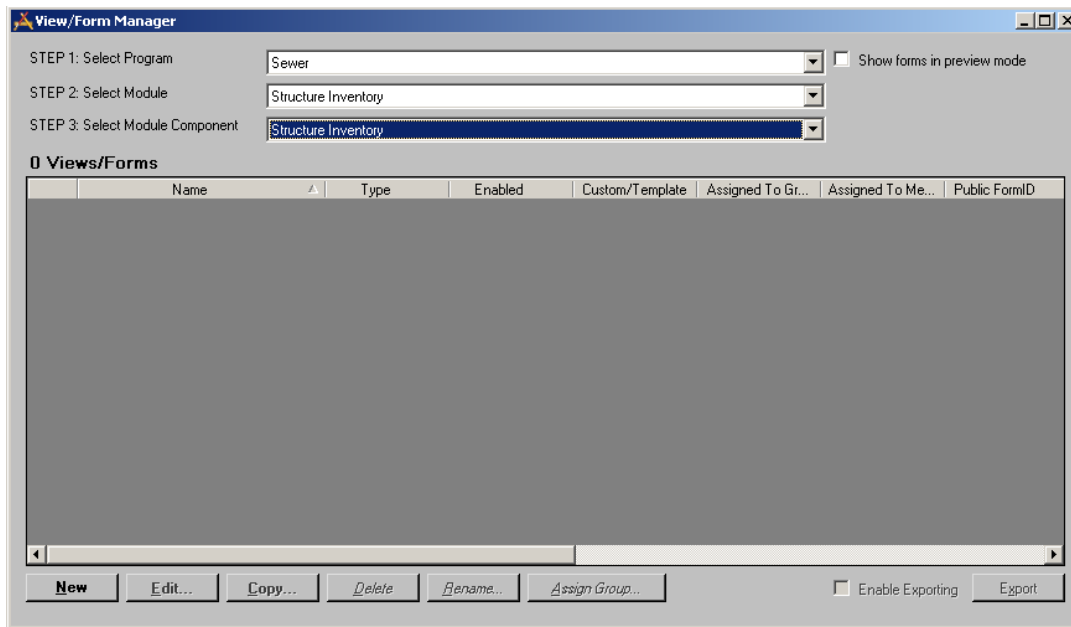
You will notice that there are no views or forms available yet for this module component.
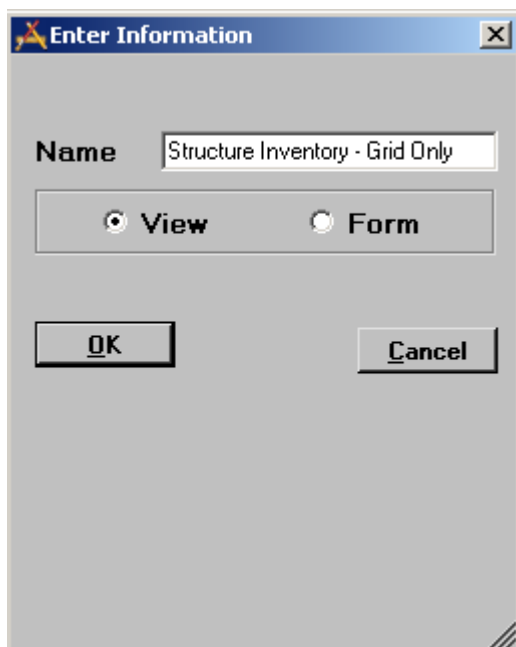
Let create a new view first. Hit the new button in the lower left. The Enter information box will pop up. Each View and Form will need a unique name. When setting this up for departments or groups, make sure that you include the name of the department/group in the title. This is a good practice and will 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.
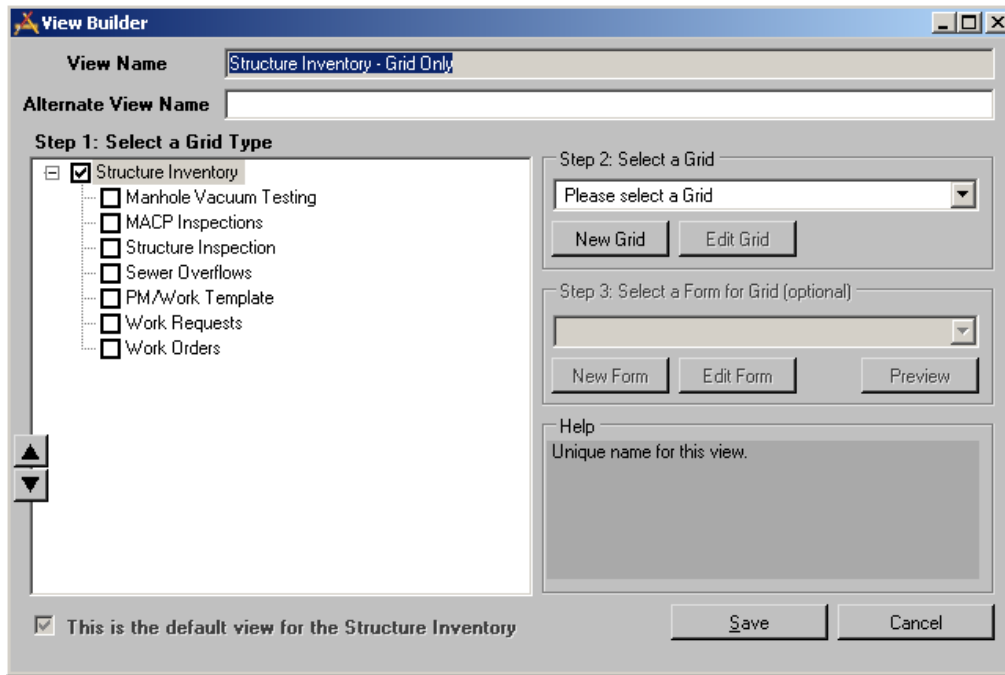
The View Builder helps step you through the process of creating a View. As stated earlier, a view is any combination of grids and forms.

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.

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So now let's hit the New Grid button:
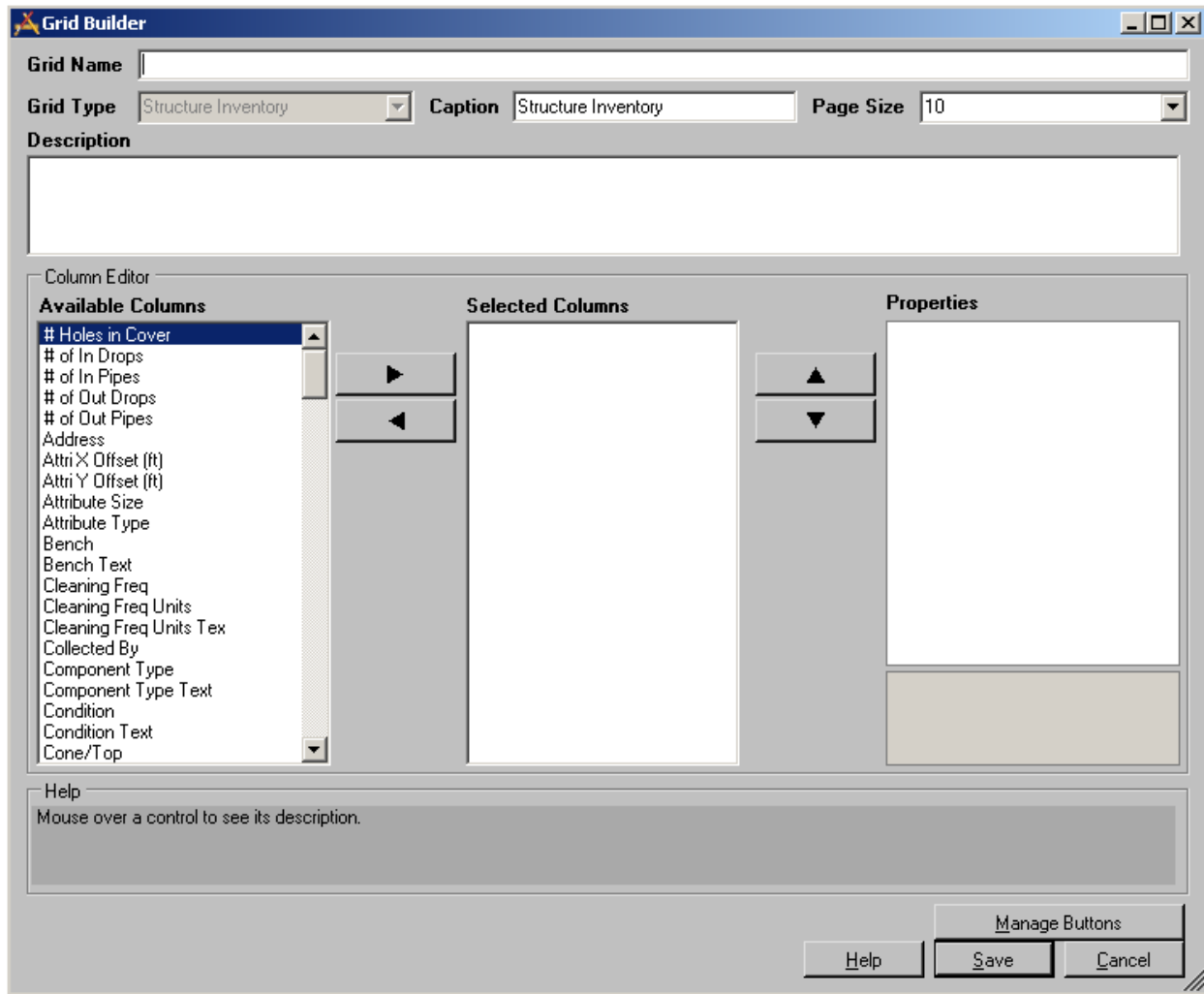
The above scary looking dialog is actually pretty simple to use. First, give it a Grid Name (use Sewer Structure Inventory – Simple). The user does not see this name so you should use something that helps you while you are selecting it from among a greater list.

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.

Selected Columns
Network Structure
Address
Street Direction
Street Name
Street Type
Street Suffix
Structure Type Text
Component Type Text
Surface Text
Dia/Length (in)
Structure Depth (ft)
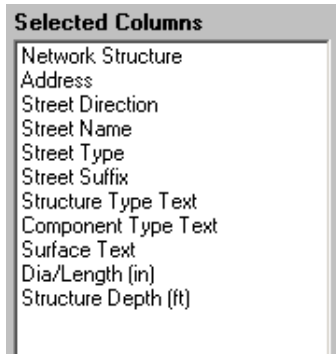
If you accidently moved a column that you did not want, you can highlight it and move it back to the Available Columns by using the right arrow. You can also move the fields up and down in the list by using the arrows to the right of the Selected Columns.

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

Properties
⊟ **Display**	
Header	**Network Structure**
⊟ **Field**	
RelatedField	MA_MANHOLE
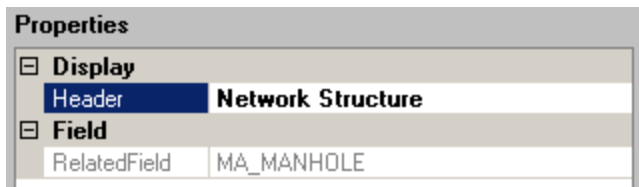
In the Properties dialog, you can then change Network Structure to Structure (or whatever you want).

Properties
⊟ **Display**	
Header	**Structure**
⊟ **Field**	
RelatedField	MA_MANHOLE
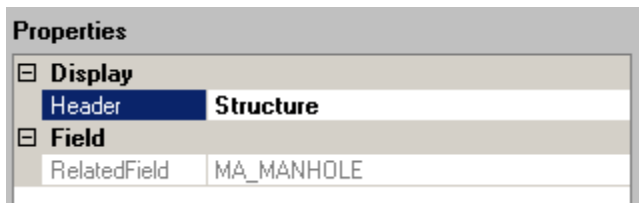
It appears that we changed almost every one of the columns. It took less than a minute. You will see the new names when the grid appears later. Now you are ready to Manage Buttons so hit the button so labeled right over the Save button!

| Manage Buttons | |
| Help | Save | Cancel |

And you get the following screen.
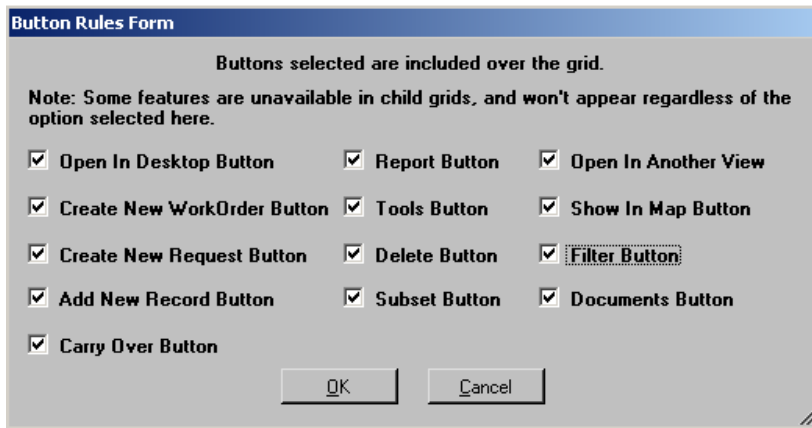
You really do not need to hit the button. However, this allows you to change any of the normal defaults so that you can limit what a user, or a group of users, can do. These settings and the security settings work in concert. Therefore, if you leave the Add New Record Button on the form but the user (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.
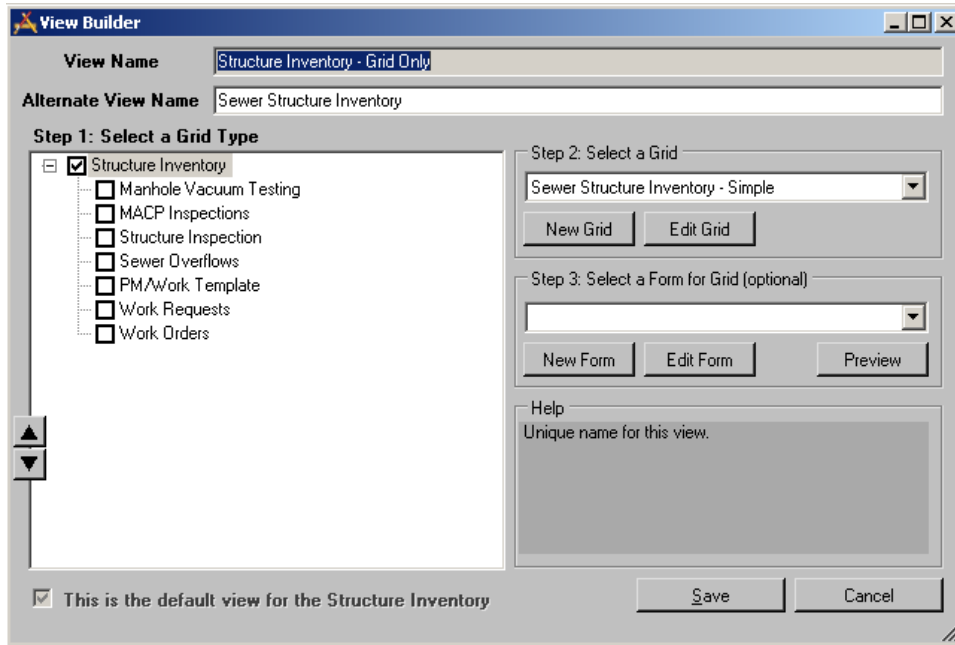
Hit the Save button. Congratulations – you have created your first view! Now we have to give users rights to view it.

From the Main Menu, Select Security > Assign Groups to Forms.
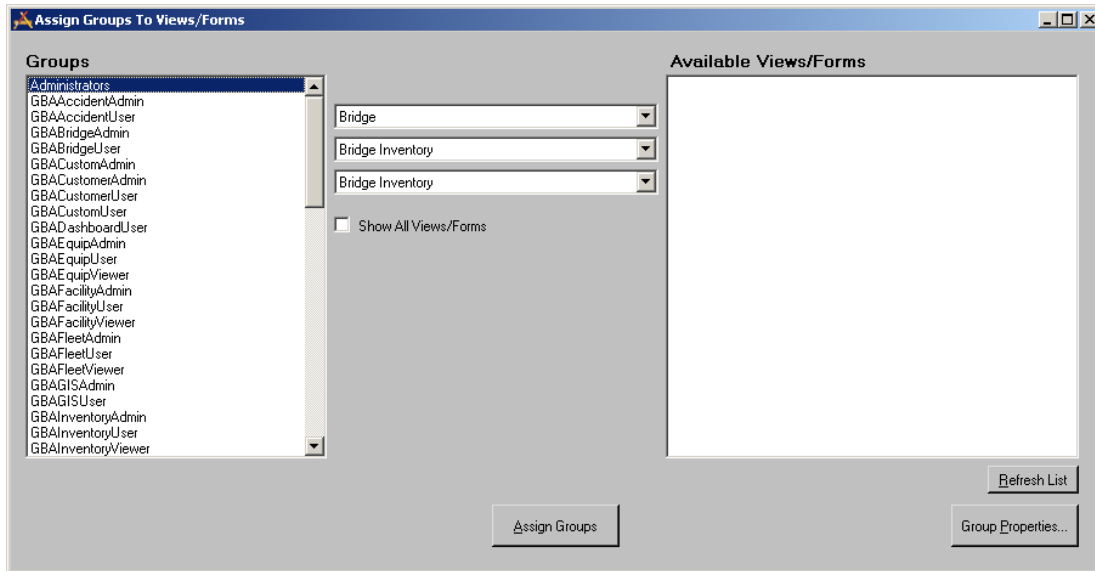
The left column shows all of the groups that have been assigned. On the right shows all of the views/forms available. Since the Show All Views/Forms is not checked, then only the forms that are available for the component (Bridge Inventory in this example) appears. Let's change that to Structure Inventory.
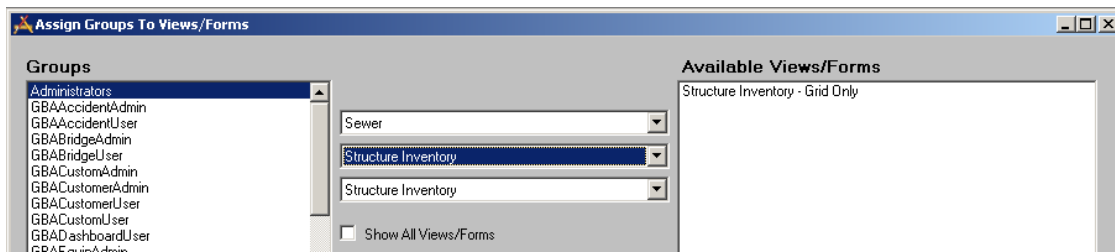
Now, you can highlight one or more Groups, highlight the Structure Inventory – Grid Only View and then hit the Assign Groups button to allow those groups the rights to view the View. Let's select the Groups Administrators and SewerViewer as the groups and go ahead and assign it.

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

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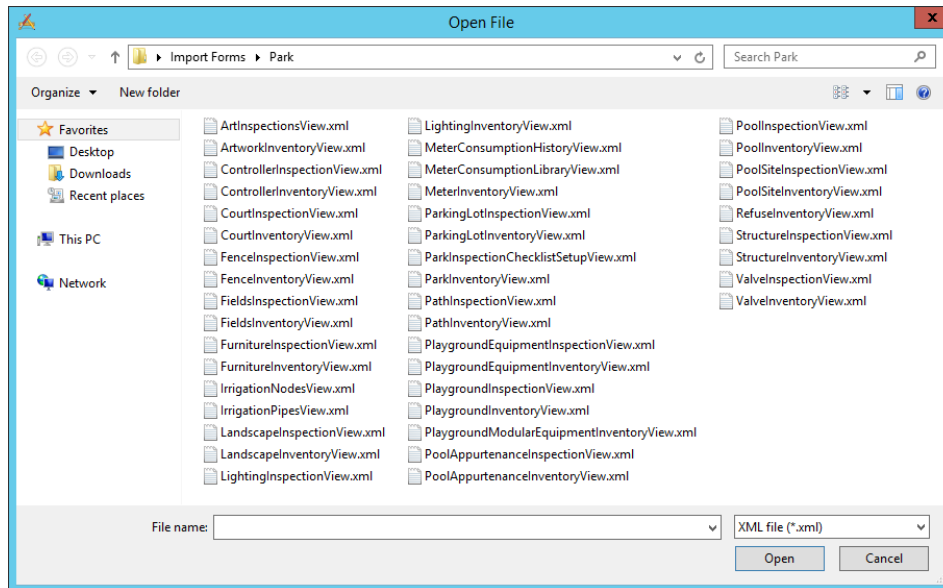
All of the views and forms that we have previously created and exported are available in a directory by product type. Let's select CourtInventoryView. Select it and hit open.

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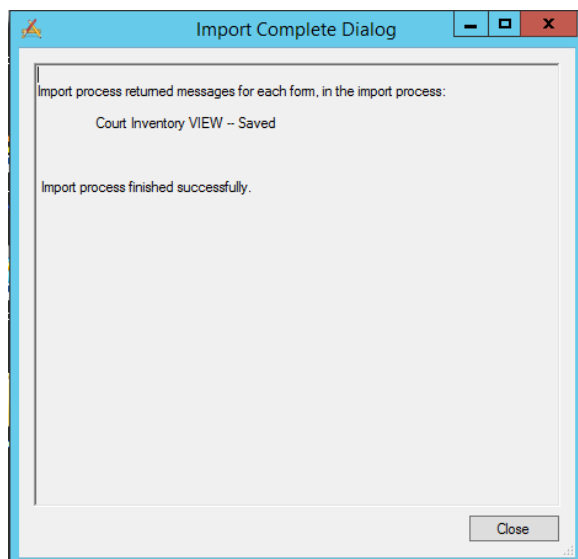
There were no errors in the import program and this dialog tells you that the Import is Complete. Hit the Close button.

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.
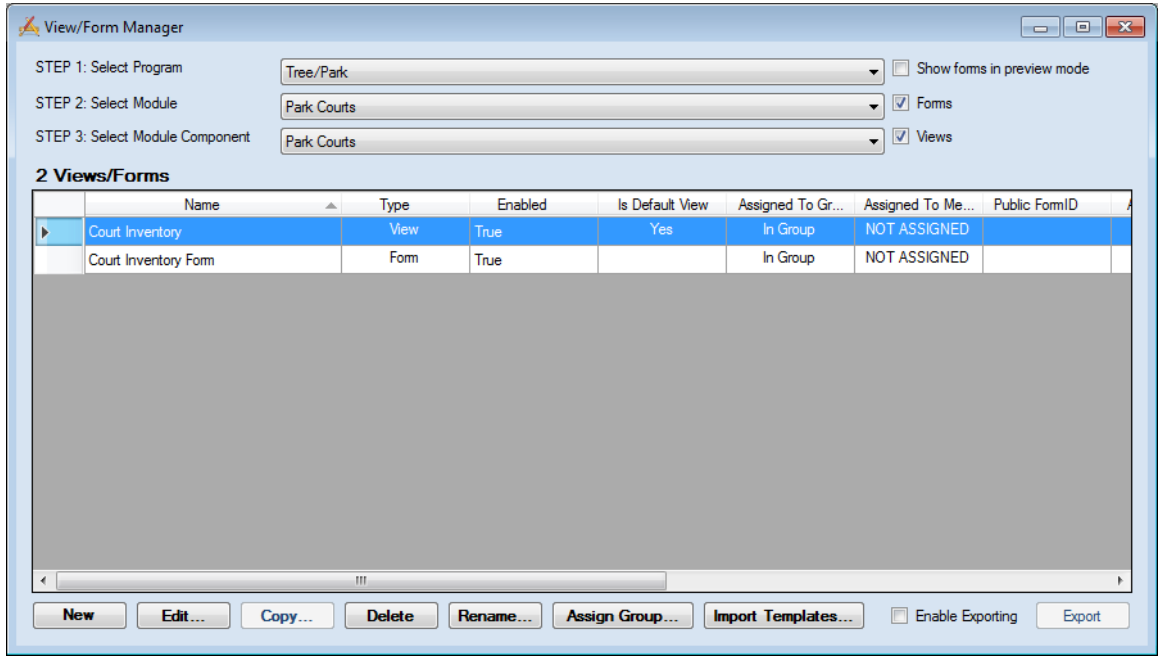
This is the default view for the Park Courts
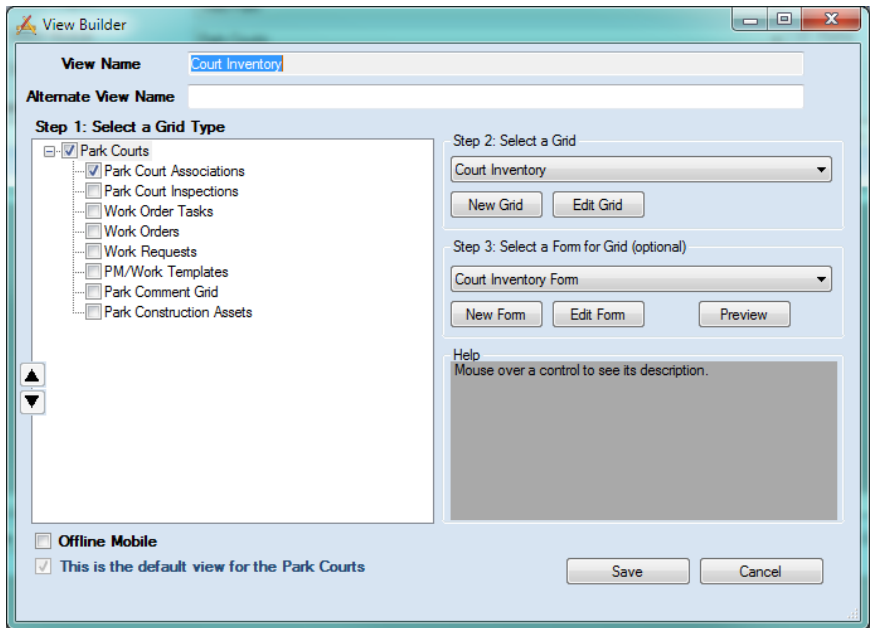
The above screen shot shows that multiple grids and forms were imported for Court Inventory. It has a Court Inventory Grid, a Court Inventory Form and at least a Park Court Association Grid. Let's edit the Court Inventory Grid (Step 2 – Select a Grid – Edit Grid)
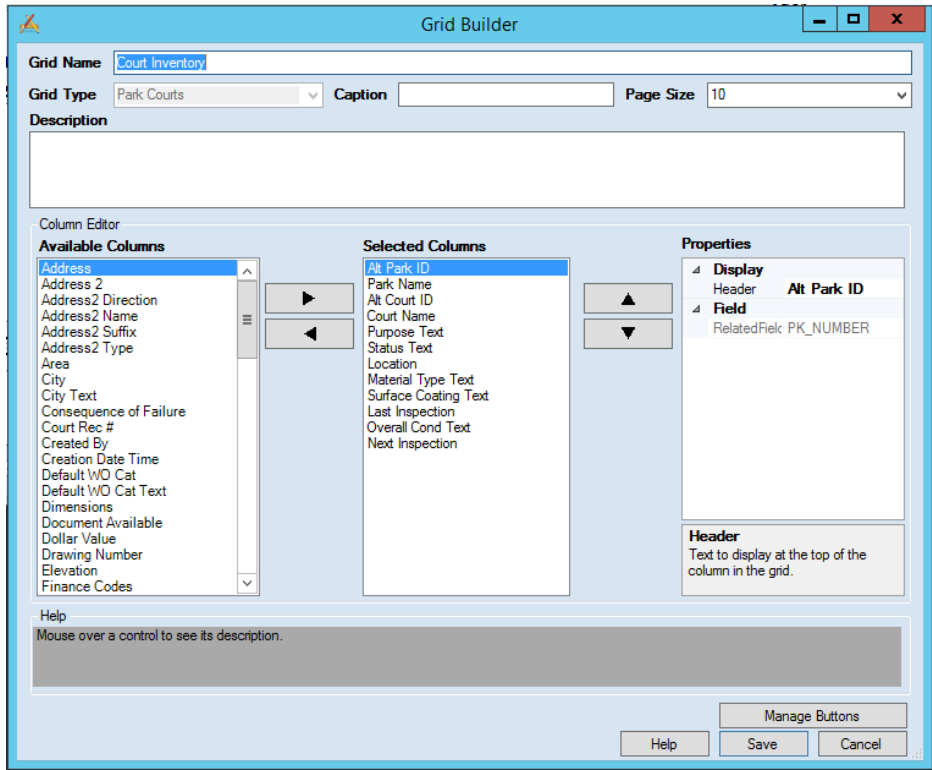
You can see that many of the fields have been placed in the Selected Columns. Now, it is simply a matter of moving fields into or out of the Selected Column and changing their properties (the names of each column) if you wish and modifying the grid buttons.

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 Lucity 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.

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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.
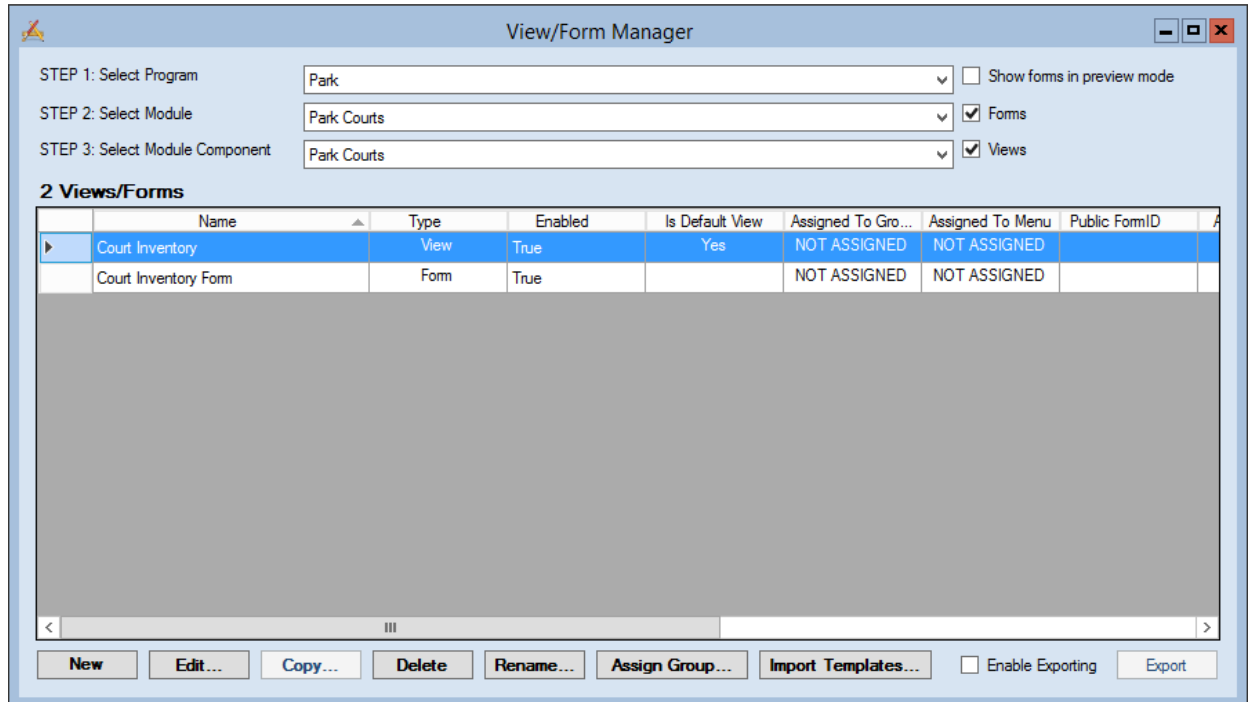
1. The columns in the table contain the following identification information:
   - The Name and Type (View or Form).
   - An indication that the form has been enabled. Only forms that have been enabled can be assigned to menus.
   - An indication whether the item has been Assigned to Groups and Assigned 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.

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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.

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
   - Views can be created for each group.
   - 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.

3. In 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.
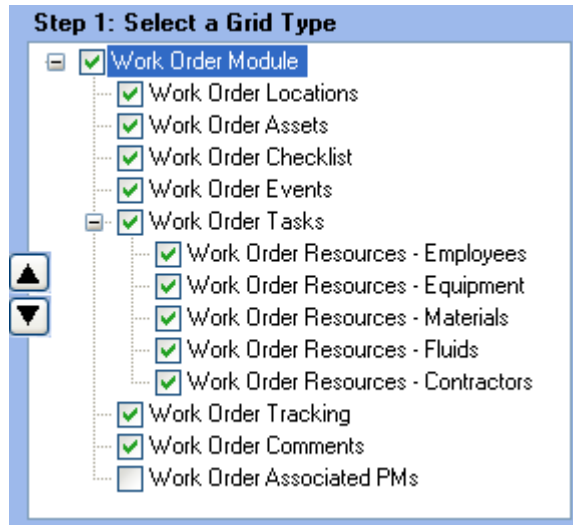
4. After selecting the types of grids, you can choose specific custom grids to add to the View.
   - Highlight a Grid Type in the left-hand section (Step 1: Select a Grid Type).
   - From the drop-down list under "Step 2: Select a Grid", choose a pre-defined, custom grid to add to your View. The grids 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.
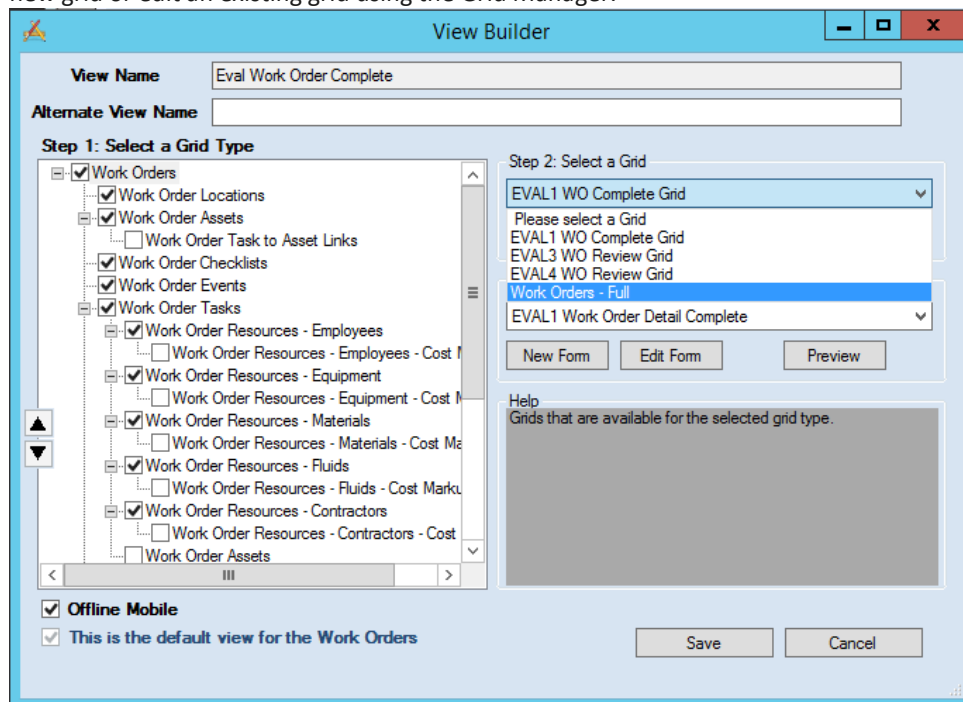
5. The final step in customizing Views is to add Forms to the selected Grids. In order for Forms to be edited on the web, they must be assigned to a Grid in this step.
   - Highlight a Grid Type in the left-hand section (Step 1: Select a Grid Type). Choose a custom Grid (Step 2: Select a Grid).
   - 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.
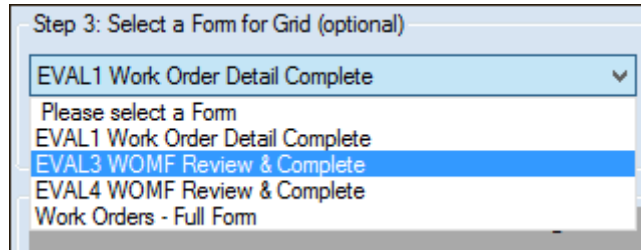
   - To see the forms as they would appear online, highlight a form name and click the *Preview*
     - button. The Control Preview window will open.
   - If none of the forms in the list suit your needs, you can use the buttons below the list to create a new form or edit an existing form using the Detailed Form Editor.
   - Continue adding Forms to each of the Grids.
6. 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.
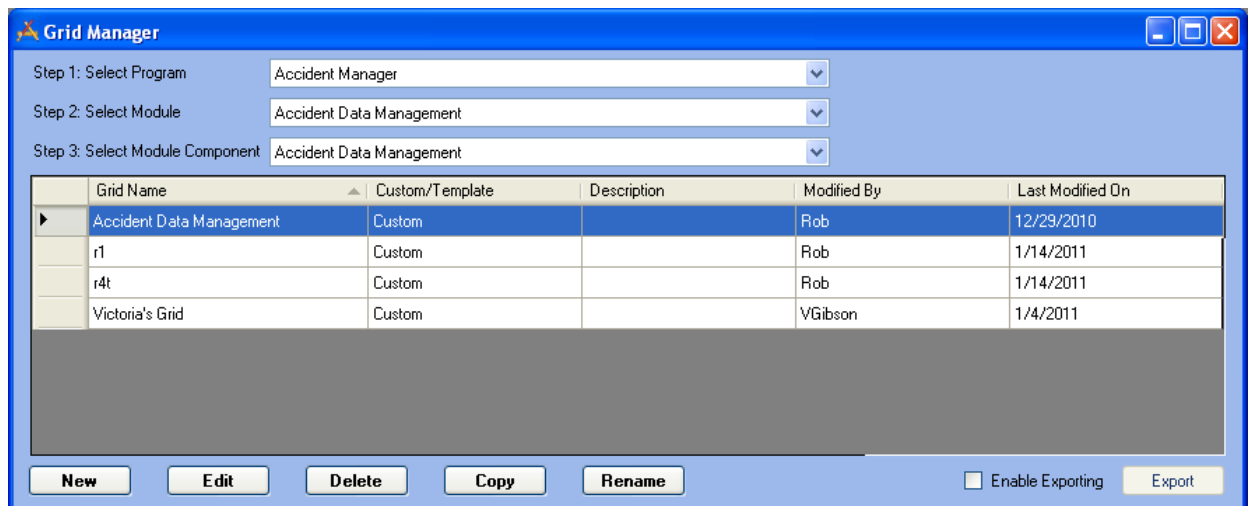
1. To use the Grid Manager, select a program from the first drop-down menu.
2. Then, select a module from the second drop-down menu. Available selections will change depending on which program was selected in the previous step.
3. Next, select a module component from the third drop-down menu. This selection 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.
   - 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.

4. 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.

2. 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.

3. 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.

4. 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.

5. 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.

6. 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.

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.
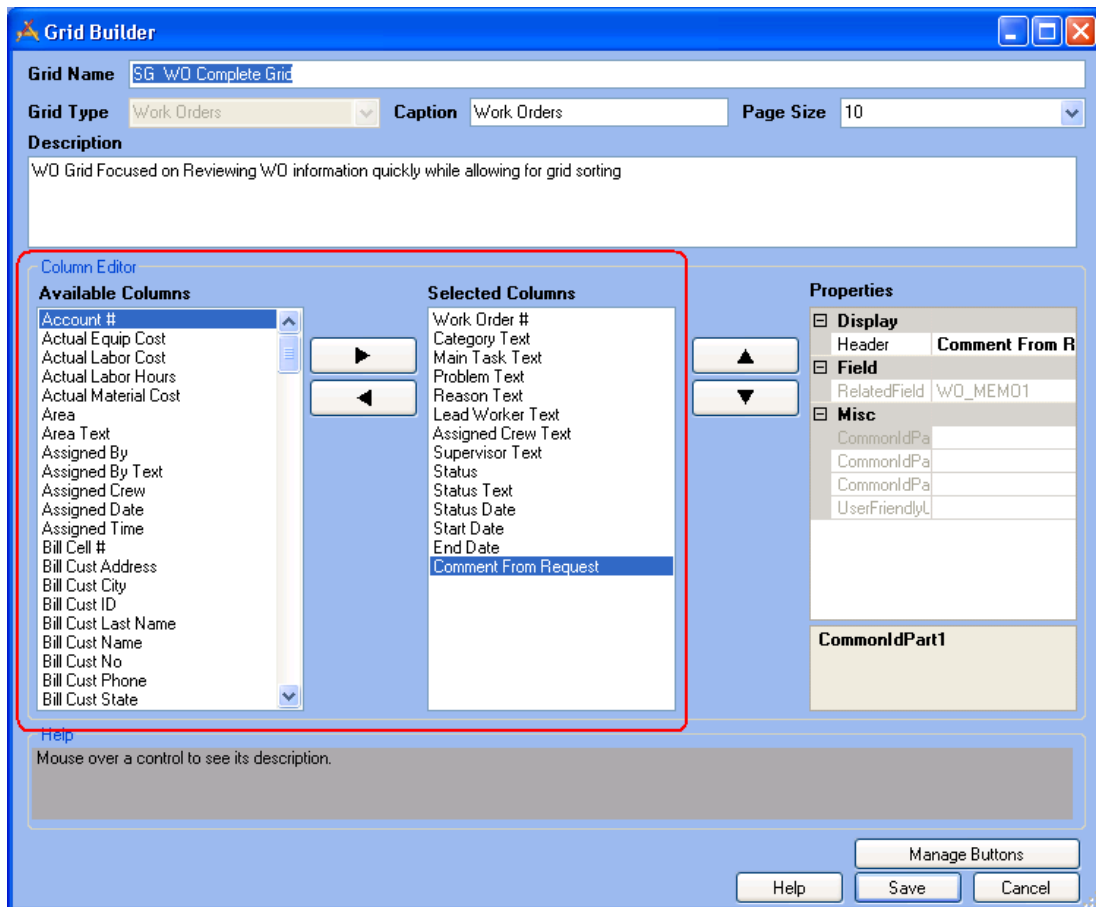
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Selecting Column Properties

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.
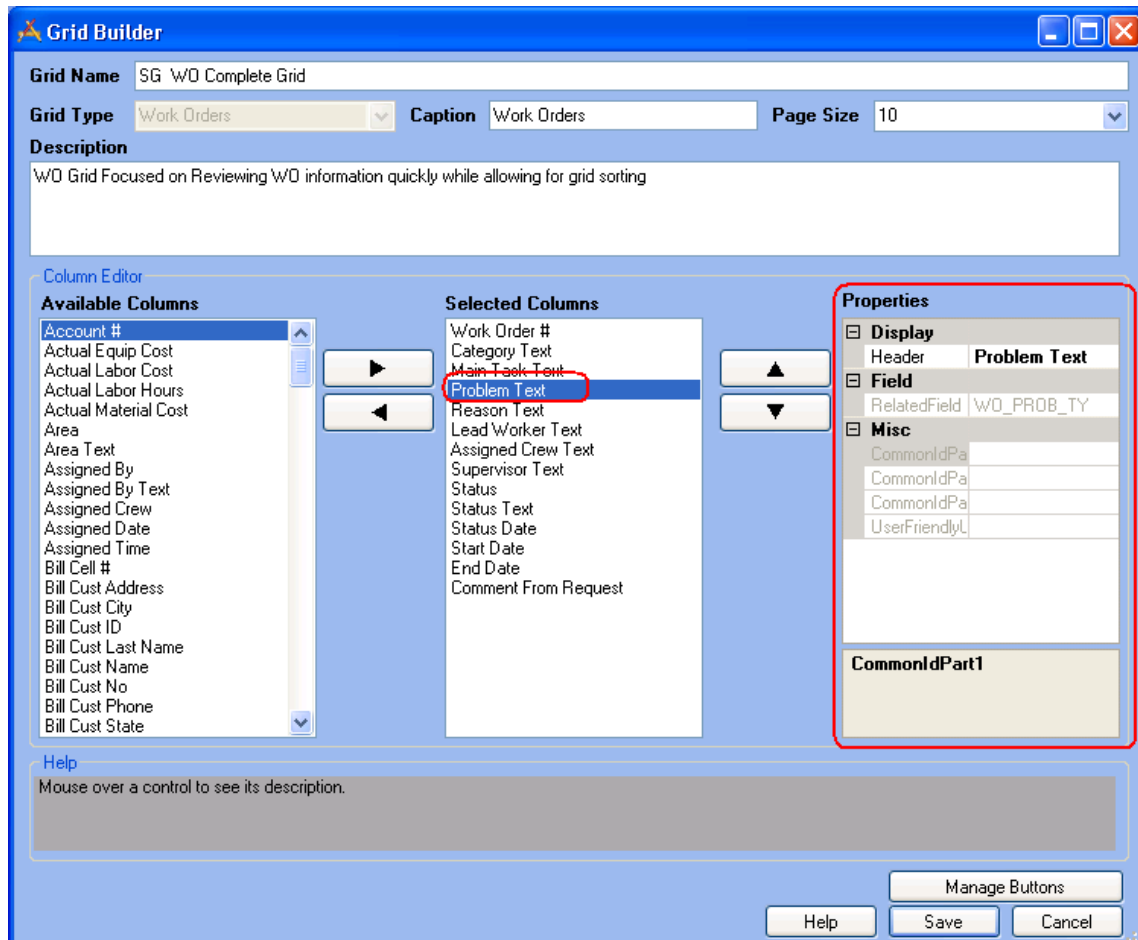
Detailed Form Editor

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.
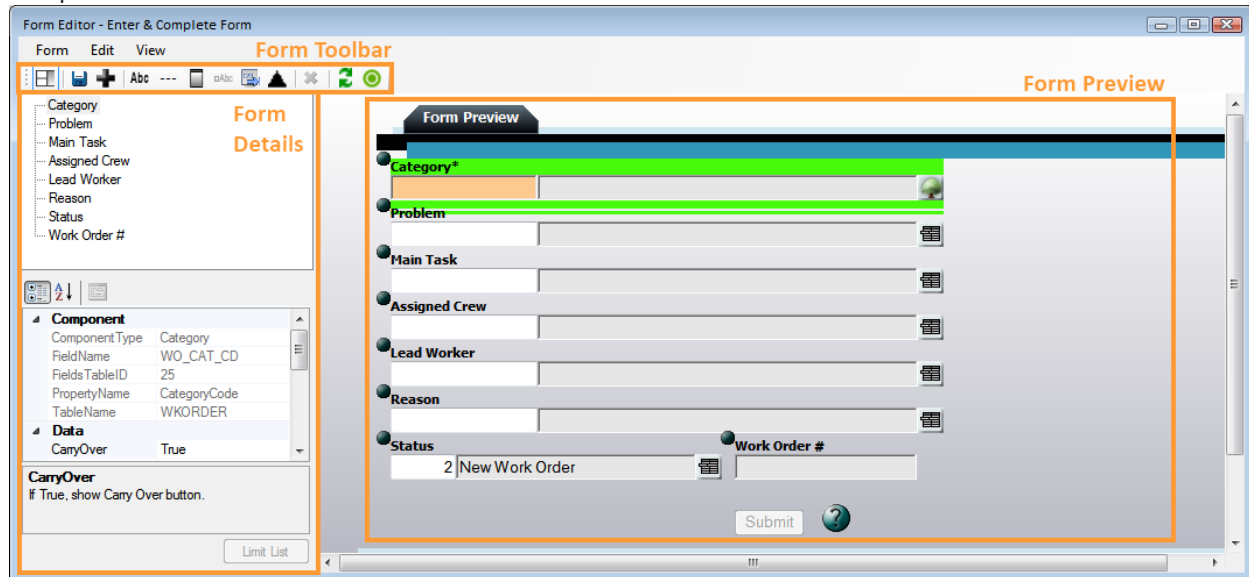
Form Preview

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.

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 [icon] button beside the Problem field to access the pick list.
2. Locate a Problem in the list, highlight it, and click *Select*.

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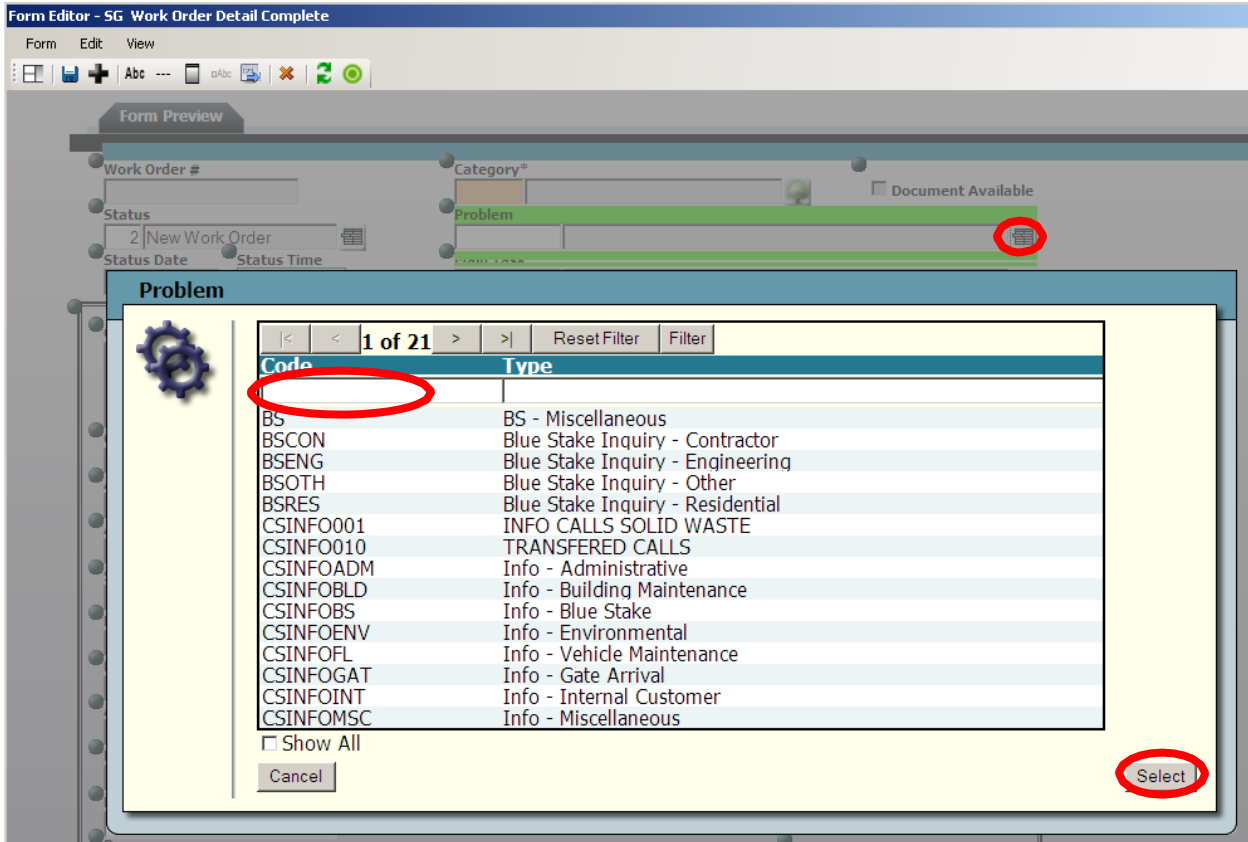
4. Note that the field currently selected on the form is outlined in bright green. This helps you quickly identify the field you are working with.
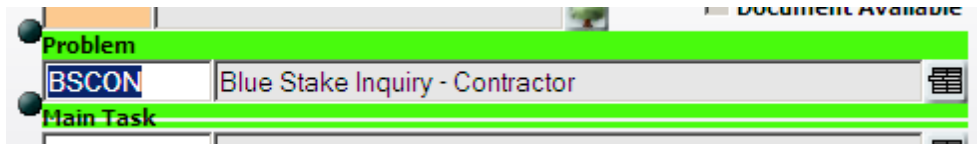
Locating Field Position on the Form

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.
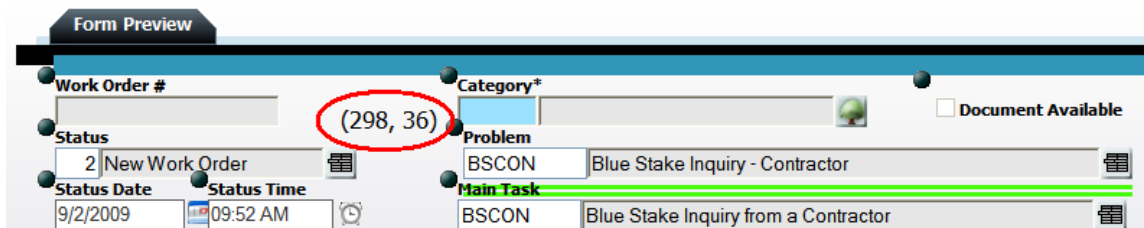
Changing Screen Sizes

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.
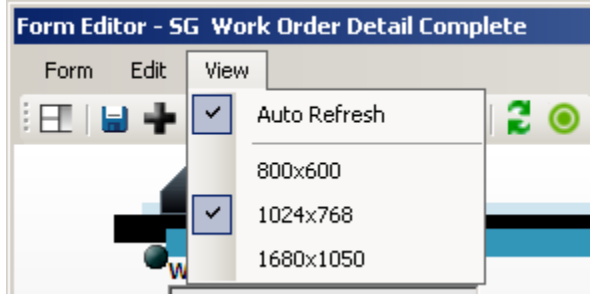
Deleting Fields on the Form

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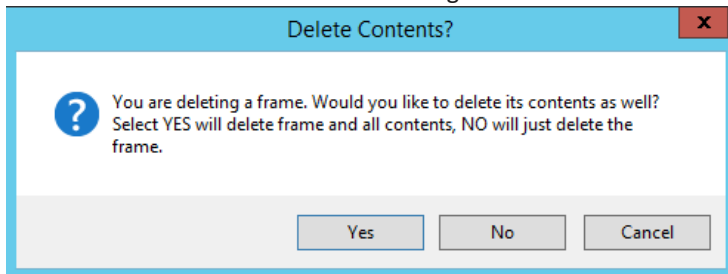
By selecting Yes, it will all of the fields within the Frame will be automatically deleted.

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.
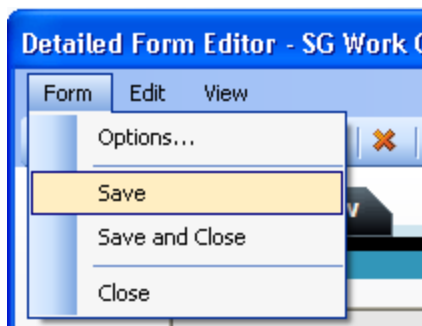
3. Click the ☒ in the corner of the Detailed Form Editor and select *Save Changes* from the resulting dialog. This will save all modifications to the form and close the Detailed Form Editor.
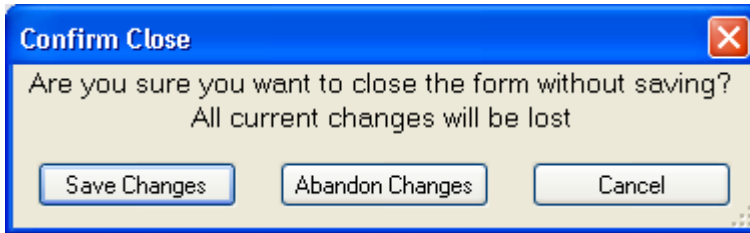
4. Now let's start editing a form. First, after importing a form let's make a copy of it so we can play with it. Select Work Orders – Full Form and hit the Copy button at the bottom. Notice how you can only copy Forms and not views. Give it a name of Work Orders ACT. Then select Edit Now.

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.

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.
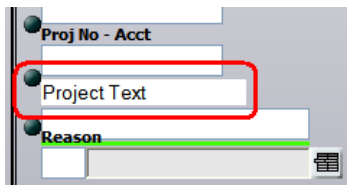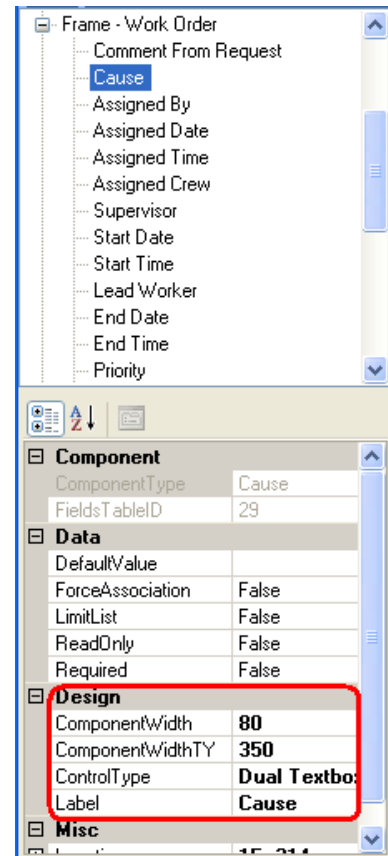
Miscellaneous

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.

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 Lucity Desktop application, it will NOT appear in the properties dialog; however, if no default value is entered here, the default value from your Lucity 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 Lucity Desktop application.
    - Any default values entered here will not affect the Lucity 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 Lucity 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 Lucity 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.
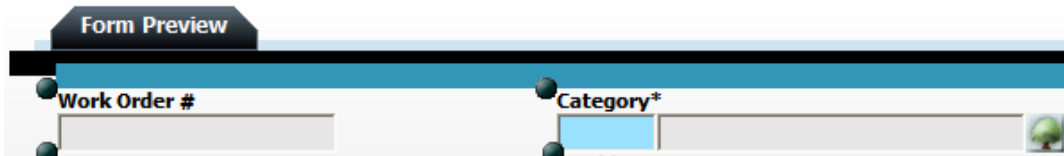
- In the example above, the Category field is required.
9. Limit List – When this is set to True, the *Limit List* button will be enabled, allowing you to select the specific pick list items available to users on the web. To use the limit list, complete the following steps:

    - 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.
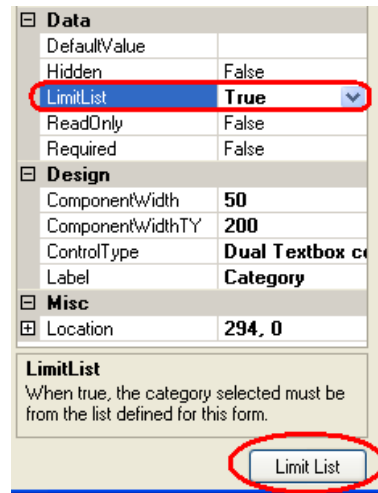
10. Save your changes.
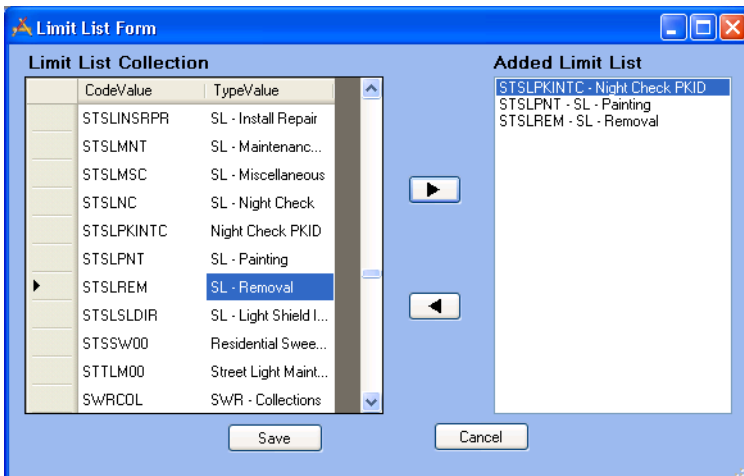
Adding Fields to the Form

You can select specific fields from those available in the Lucity Desktop application to add to the Detailed Form Editor. Remember, fields that are required by the Lucity 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 Lucity 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 Lucity 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.
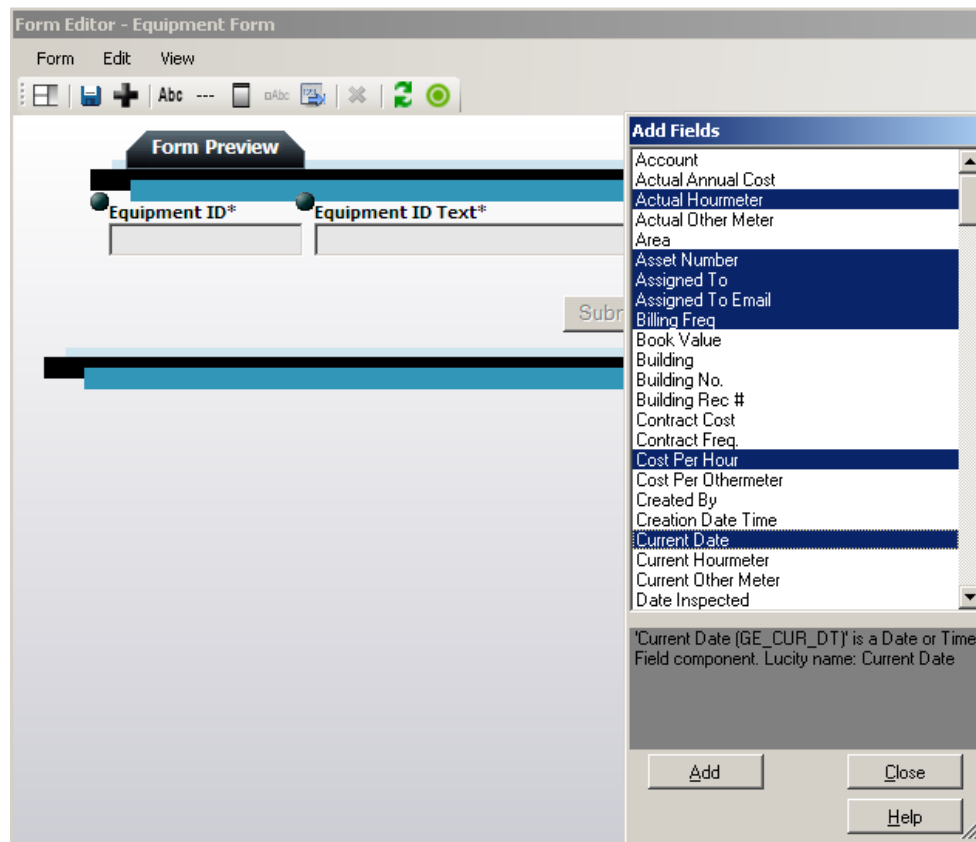
5. The system will place fields on the form in the order in which you selected them in the Add Fields dialog. Remember, you can easily change the arrangement of fields on the form by clicking on the handle ● beside each field and dragging it with your mouse.

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.
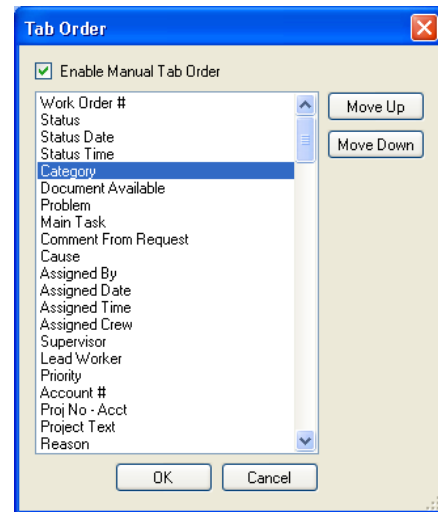
Adding Special Items

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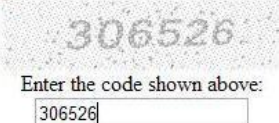
File Upload - This button adds a file upload field to the form. The fields only work on Request Forms and allow requesters to attach a file to their request. The file is then uploaded to the server and linked to the request.

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.

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. o *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.). o *Note: This is a very important step. If this box is not checked, the form will not be available to add to a menu.* *Follow the link for additional information on adding forms to menus.*

Captcha enabled	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. 306526 Enter the code shown above: 306526
Show Submit Button	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.
Show Create Work Order Button	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.
Show Additional Emails Textbox	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.
Use Information From Employee	Checking this option causes the form to pull information from the employee's Lucity employee record (Work > Work Flow Setup > Employees) to populate fields when they are filling out a request. This works for internally submitted requests.
Citizen ID	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 Lucity login ID. Enter a unique, alphanumeric ID using uppercase letters and numbers only (e.g. XYZ123, CITIZEN1). Do not use any symbols (i.e. *, #, %). 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: **<"http://<servername>/LucityWebCitizen/?FUI=XYZ123">Click here to report a problem ** o *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.*

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.

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.

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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.
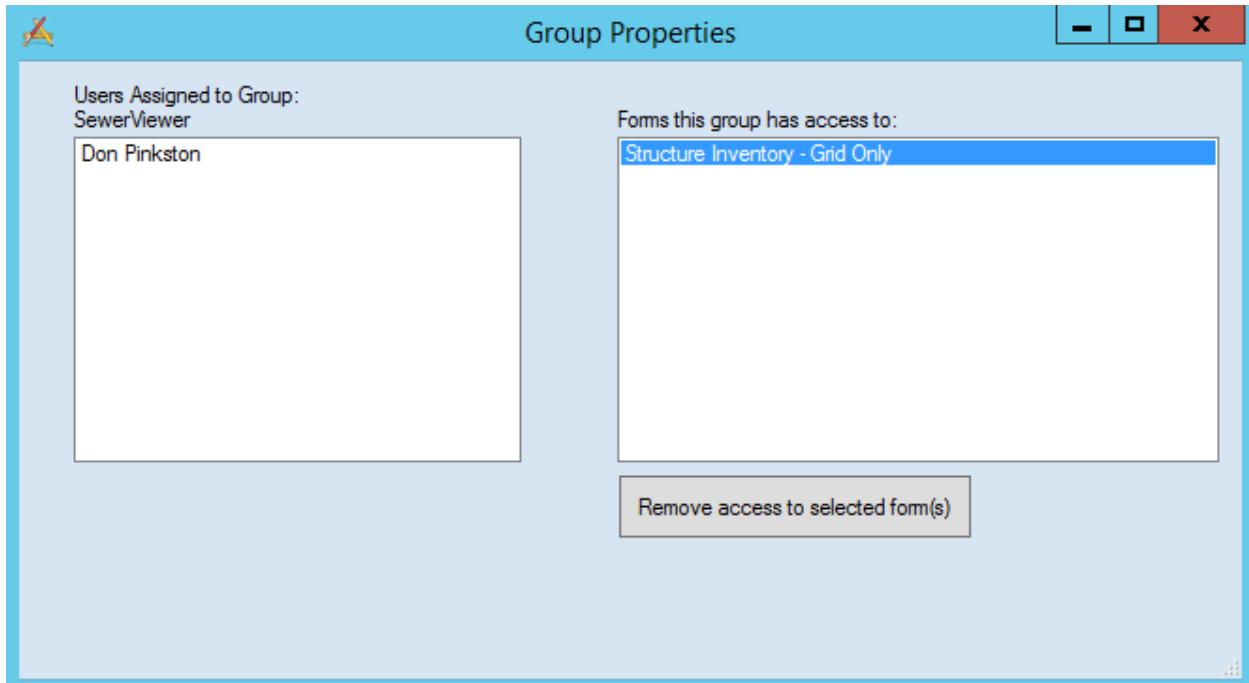
The Group Assigned to Views/Forms works the other way. Taking the list that is displayed in the Available Views/Forms grid, it displays all of the records in this list. Then the administrator can select any of the forms to see what groups have rights to use the view/form.
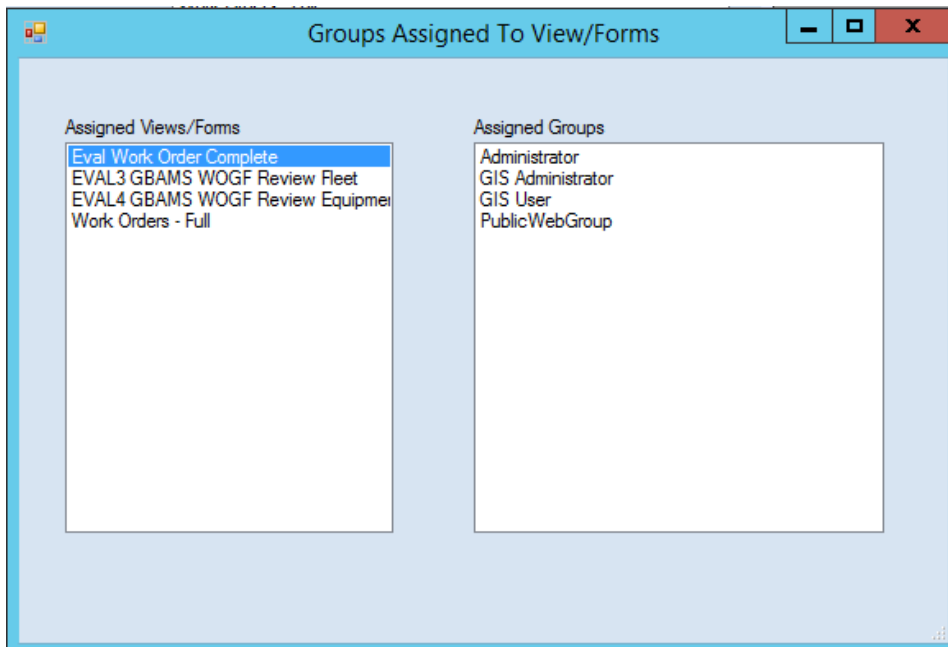
The middle section of the Assign Groups to Views/Forms allows the user to change what information is displayed in the Available Views/Forms grid as well Assigning Views/Forms to Groups.
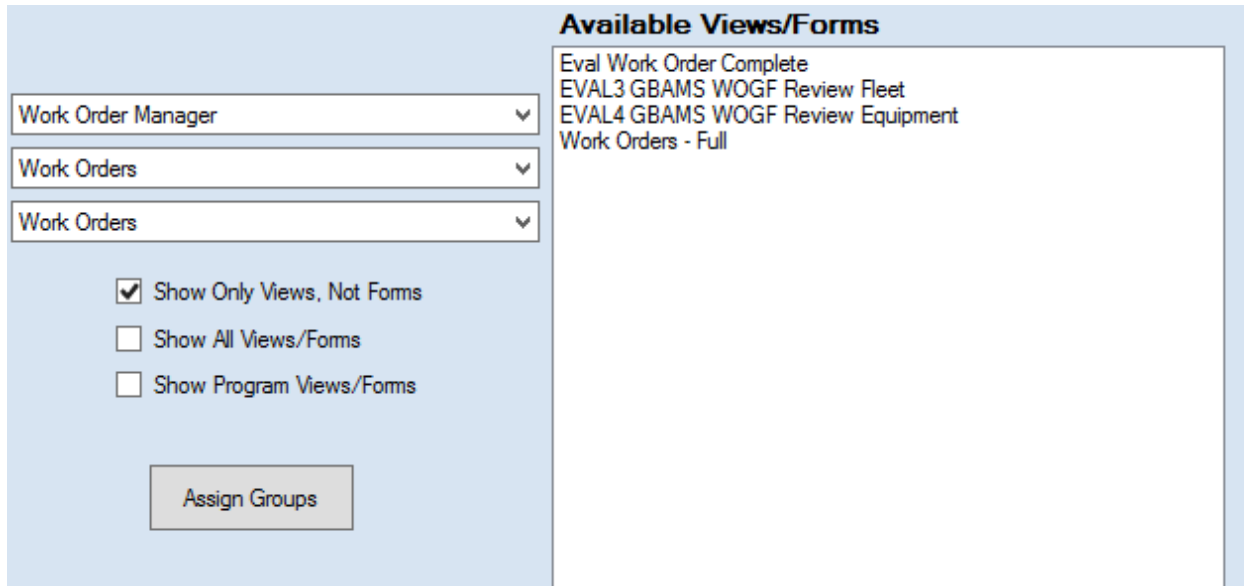
- None Checked – Shows all Views and Forms for the selected module component.
- Show Only Views, Not Forms – Only shows the Views for the selected module component. This can be also used in conjunction with Show Program Views/Forms
- Show All Views/Forms – Shows every View and Form in your system
- Show 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
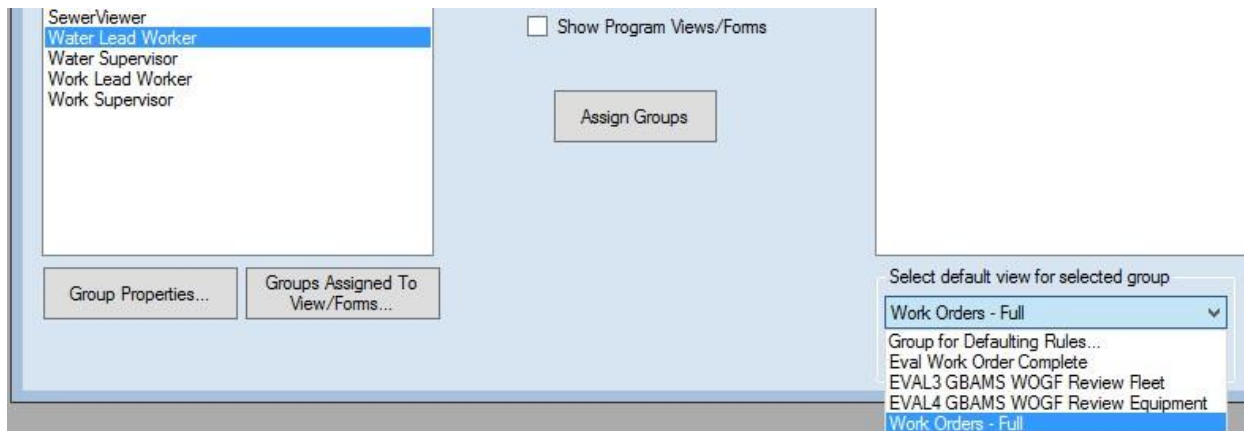
Finally after the view is selected, hit the "Assign default view to group" button to assign that view as that groups default view. You can tell if any group has a default view by highlighting it. If the edit box shows "Group for Defaulting Rules…" then no view has been defined for that groups.

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 <u>will</u> also appear in this list.

Create New Menu Group

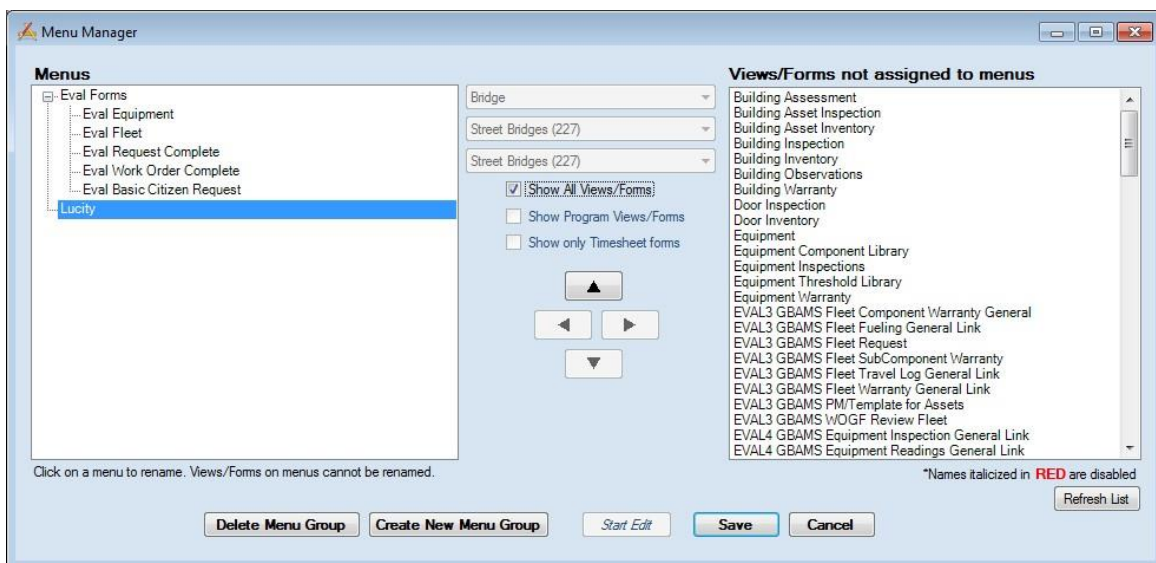The menu groups appear on the left-hand side of the Menu Manager. To add a menu group listing, complete the steps below:

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.

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.
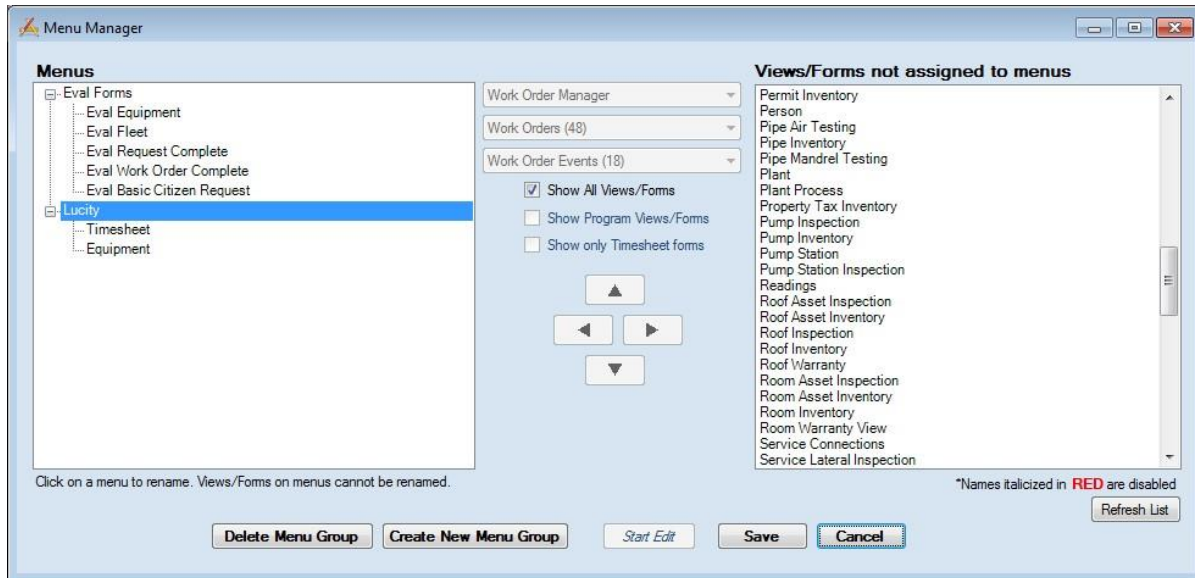
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Practice Problems

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 Lucity Web application.

Practice #1 – Request Submittal for Building Maintenance
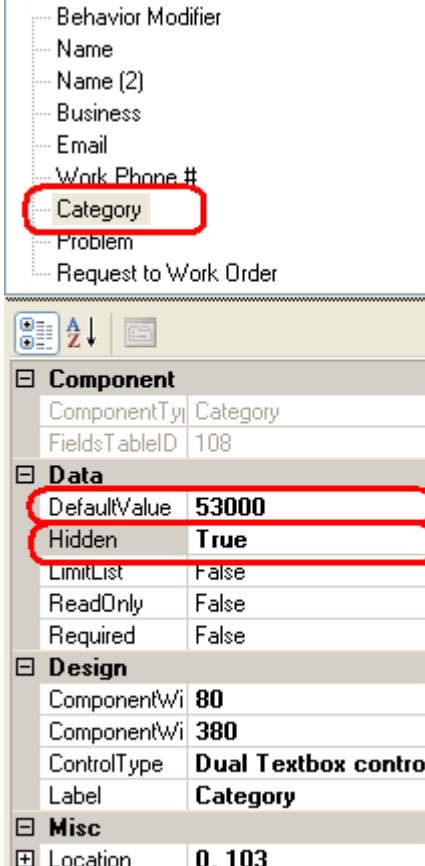
1. In the Form Manager, create a Form for "Internal Building Maintenance Request" so it looks like the screen below
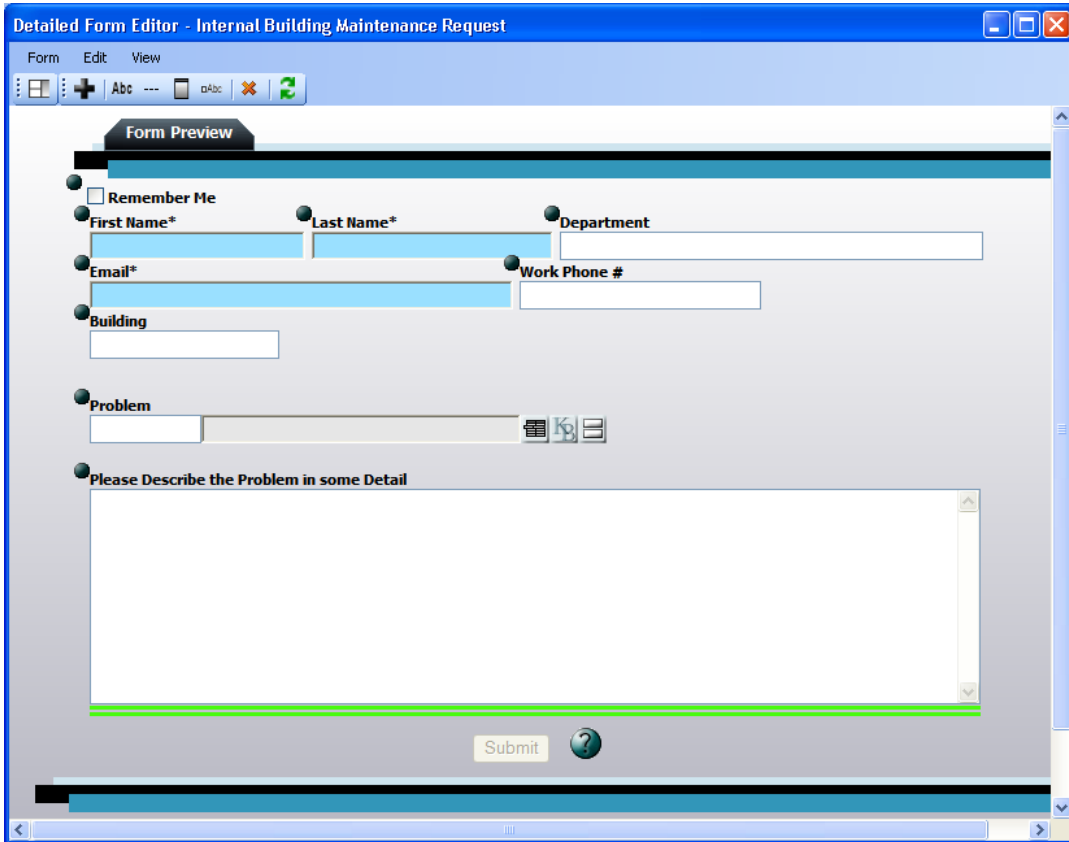
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2. For the Category field:

- 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.

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.
   - Save and Close the form.
5. 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.

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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*.
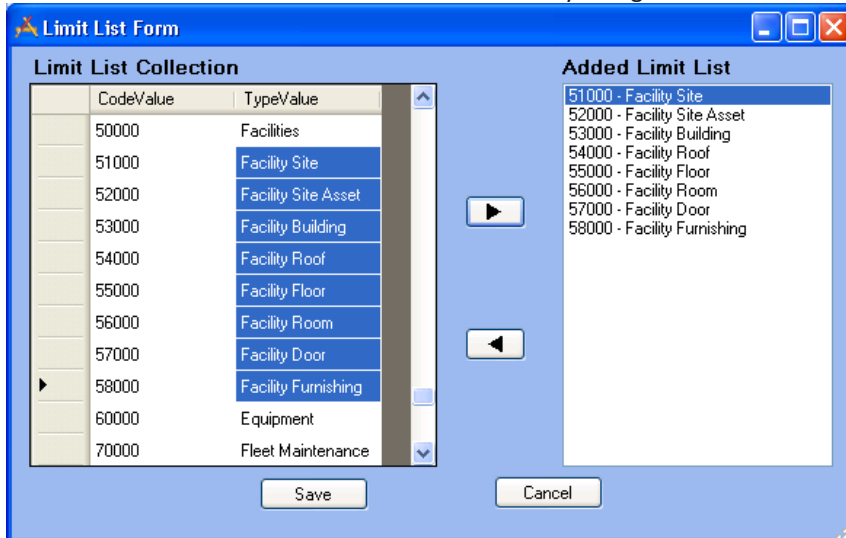2. Use the handles to move the Comment, Problem, and Building fields down.
3. Open the Form Details dialog and select "Category". Make the following changes to the
   - Category's field properties:
   - Set the Hidden property to "False". Set the Limit List property to "True".
   - Click on the Limit List button and select all Facility Categories:

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 combo boxes that narrow a final combo box'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.*
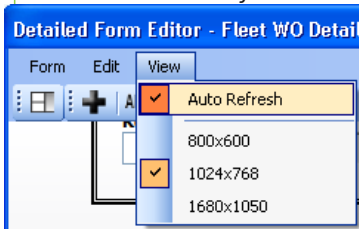
3. Add the System ID 1 field onto the form
4. Use the handle to move the System ID 1 field to the header section at the top of the form.
5. Change the field label from "System ID 1" to "Vehicle".
   - Click on the label in the Detailed Form Editor and type "Vehicle" in the text box.
6. Use the handles 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.
   - Set the Hidden Type "True".
   - Set the Default Type to "Fleet".
   - Set the field to "Required".
   - Change the Label for Asset to "Fleet ID".
   - Set the Control Type equal to "Textbox Control".
3. Add the following fields:
   - WO Cost
   - 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".
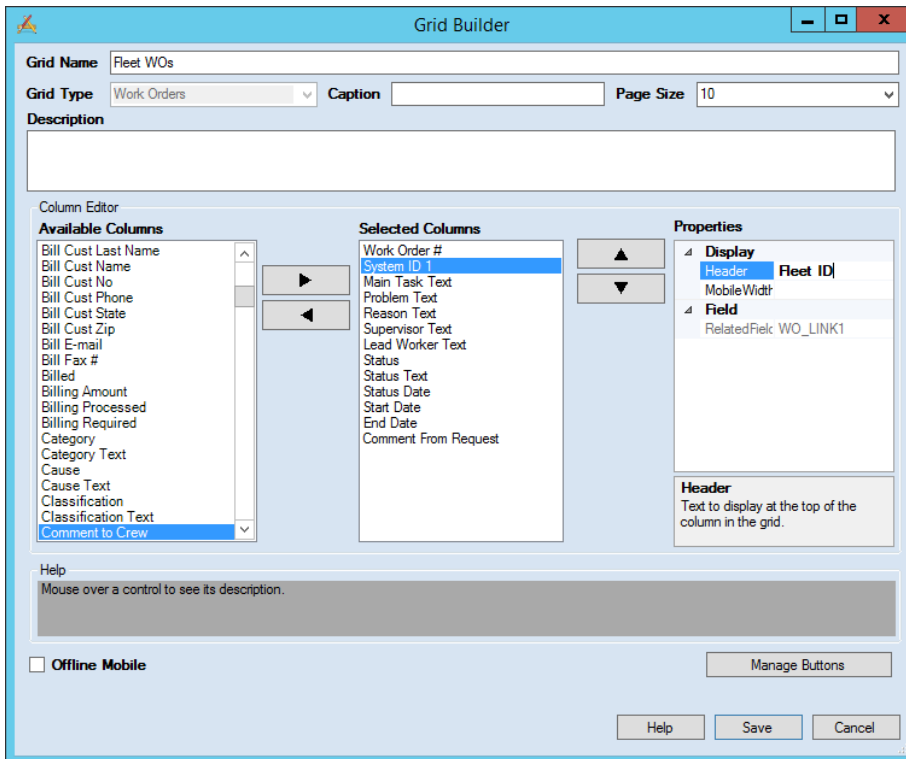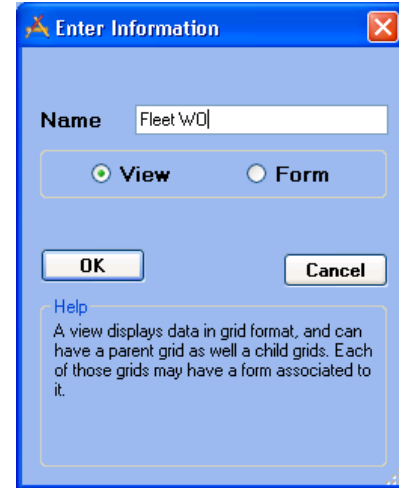
4. Click on the *Edit Grid* button to access the Grid Builder. Then, make the following changes:
   - From the Available Columns grid, select "System ID 1". Use the right arrow button to add it to the Selected Columns list.
   - Highlight "System ID 1" in the Selected Columns list and use the up arrow 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.

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
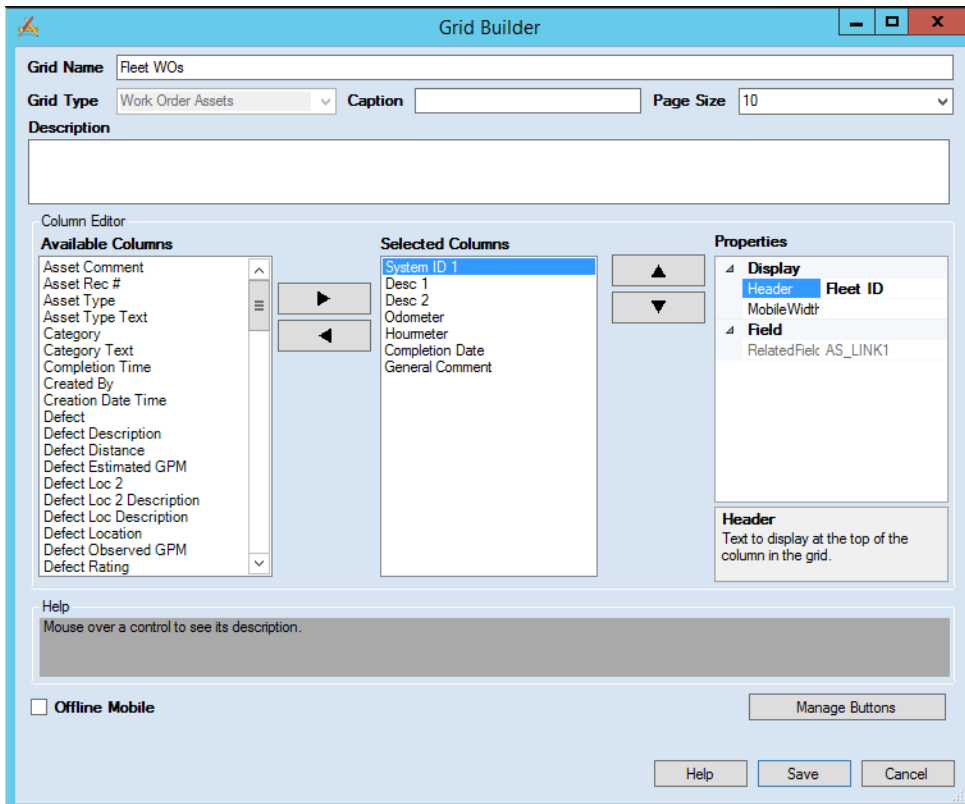
   - In Step 3, select the "Fleet WO Asset" form.

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.
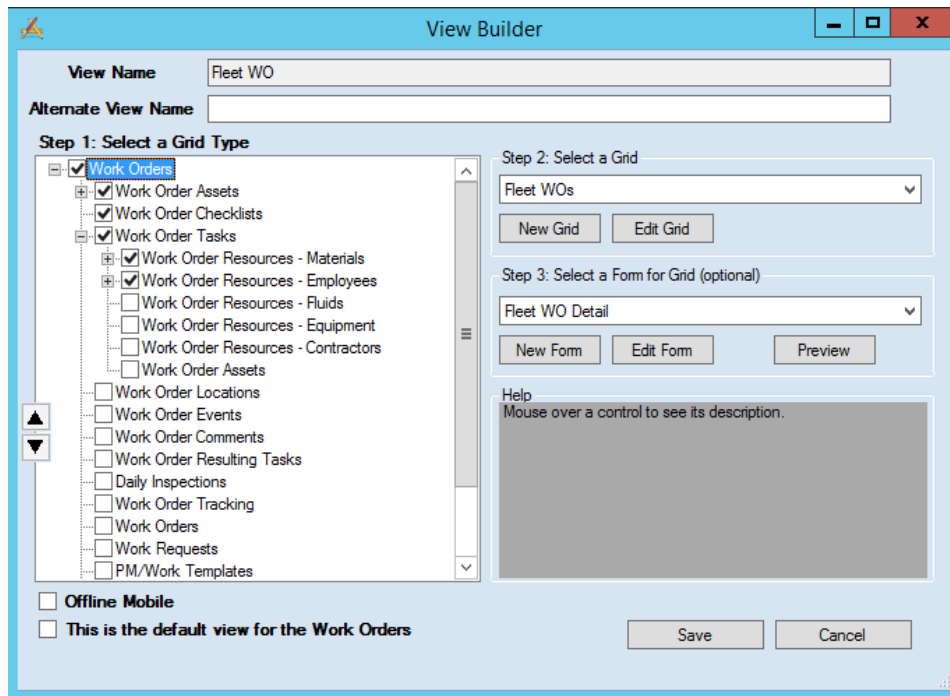
10. Save your changes.

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)

Moving to Lucity Web   89

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

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. If time allows, we can use these examples at the end of our session.

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

Show

- Modify Shared Dashboard – Open Requests

Views/Forms
- Create WO View/form for Water Lead Workers

- Attach view/forms to Water Lead Worker group
- Create Water Hydrant View/form (import from Lucity)
- Create Water Hydrant Inspection View/form (import from Lucity)
- 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

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