lucity™
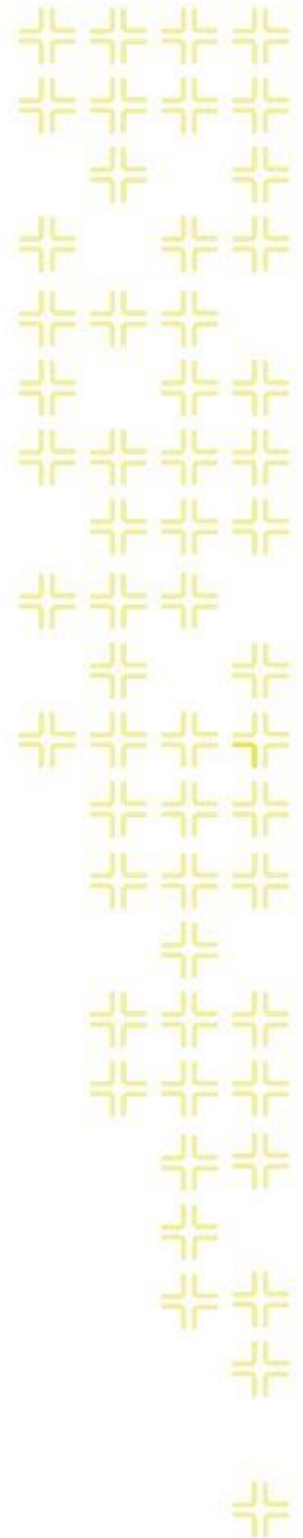
Admin
## Dashboard Administration

Dashboard Administration

This section goes over administering dashboards to multiple users in your system. It also reviews recent changes to the dashboard plugins.

Contents

Training Resources

There are several videos that discuss general dashboard management. They are on older releases but still very applicable to the overall flow of managing dashboards. I recommend "Lucity Dashboard Management Webinar". You can find this by searching for Dashboard on our support portal and selecting videos.
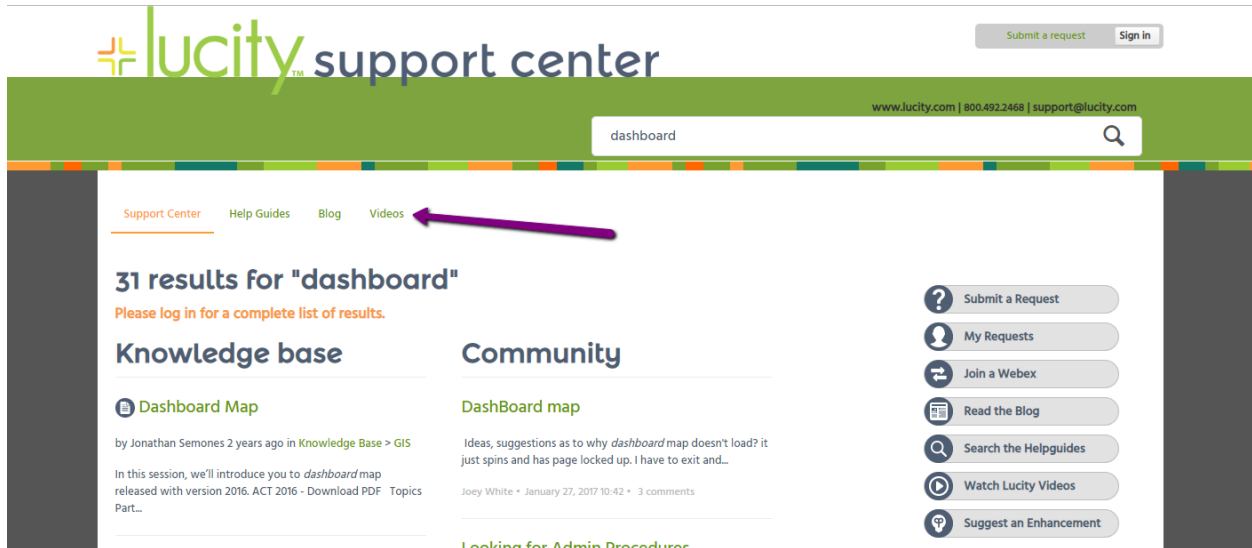
Overview of dashboard management patterns you can apply (in multiple variations).

Assign Shared Tab Groups based on the user's default rules group
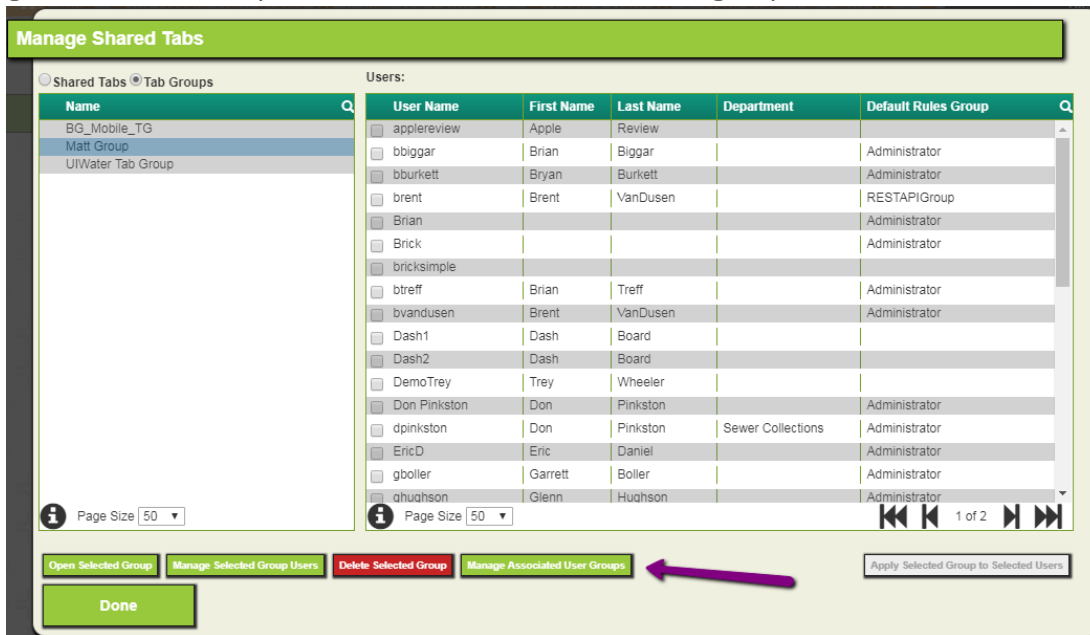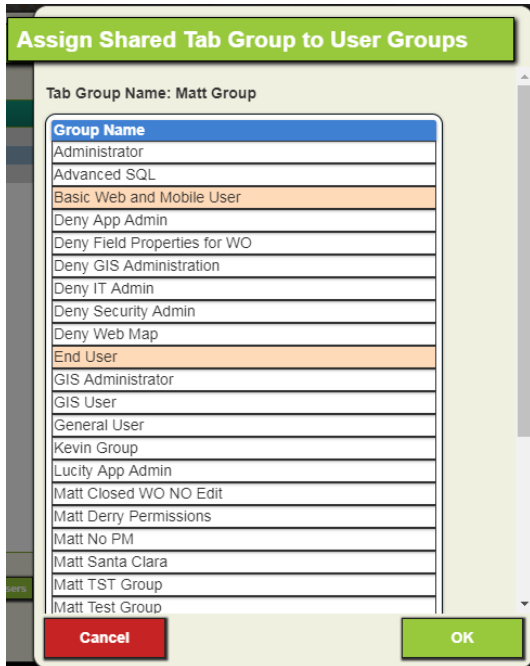
Assign user dashboards based on their group (with or without end user ability to add new dashboard tabs)

- Shared Tab Groups: http://help.lucity.com/webhelp/latest/web/index.htm#26058.htm
- (with edit Dashboard Permission) User able to add shared tabs and user tabs
- (or without edit Dashboard Permission) User does not have an "Enter Design Mode" button and cannot add any dashboard tabs (user or shared)

Assign shared tabs to users (with or without end user ability to add new dashboard tabs)

- Shared Tabs. Same basic flow as dashboard shared tab groups but more work for admins! I recommend shared tab groups as the base dashboards. http://help.lucity.com/webhelp/latest/web/index.htm#35726.htm

Allow users to self-manage their dashboards

- For the brave souls who want to spend their time troubleshooting everyone's dashboard!

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Dashboard Plugin Options

- Asset Tree
- Crystal Report (not available in mobile)
- Data Drill
- Map (not available in mobile)
- Quick Lookup
- URL (available in iOS only, coming to Android Fall 2018)
- Time Summary (available in iOS only, coming to Android Fall 2018, no offline support)

Use Reserved Words

These make it possible to make dashboards that work effectively for multiple users yet still includes content only relevant to them. Things like, return all work orders for today or return all of the work orders assigned to me as supervisor.
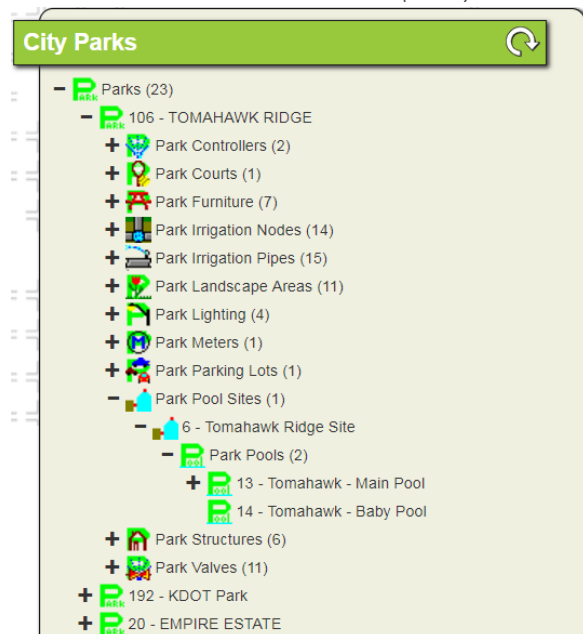
https://help.lucity.com/webhelp/latest/web/index.htm#33579.htm

%LOGGEDINUSERID%, %LOGGEDINEMPCODE%,%CURRENTYEAR%, etc.

New features in Lucity 2018 and Lucity 2018r2 for Plugins

Asset Tree

Parks now show in the asset tree (18r2)

It is a good idea if you are using these asset trees to set filters and have the tree be limited at the root. In this case I only grabbed city parks and not parkways and some of the other smaller parks.

Unfortunately, we do not let you change the name of the root asset tree element (we will correct this soon), but you can use frames to organize and label this for now.
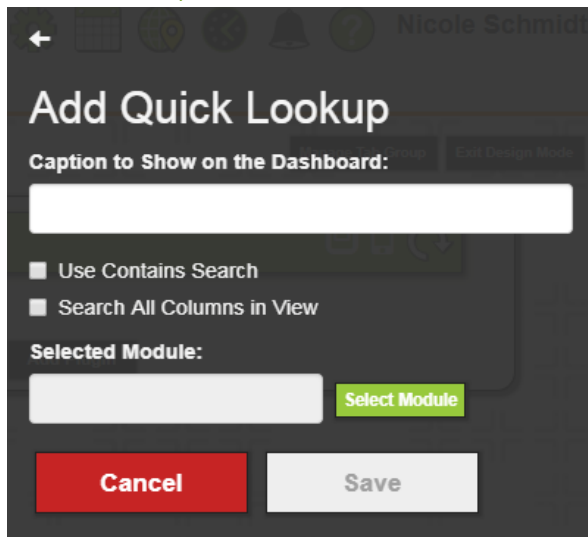
Mobile Asset Trees
Asset trees work online and offline for mobile. For Lucity 2018r2, offline asset trees are limited to a total of 5000 items per asset tree. We recommend filtering your asset trees. This is a new limit to prevent excessively long download times due to inefficiently configured dashboards.
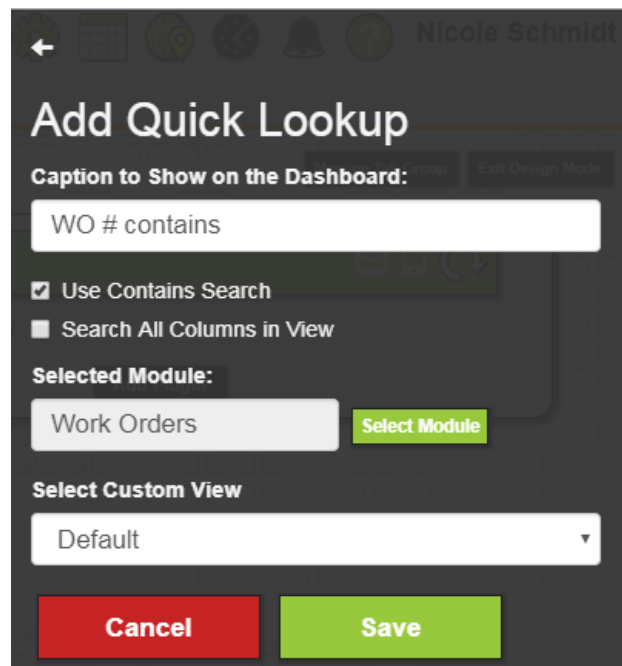
Other recent changes for asset trees:
- Issues resolved with plant process or equipment dependents repeating themselves (18r2)
- Equipment will now appear as a child of Site (18r2)
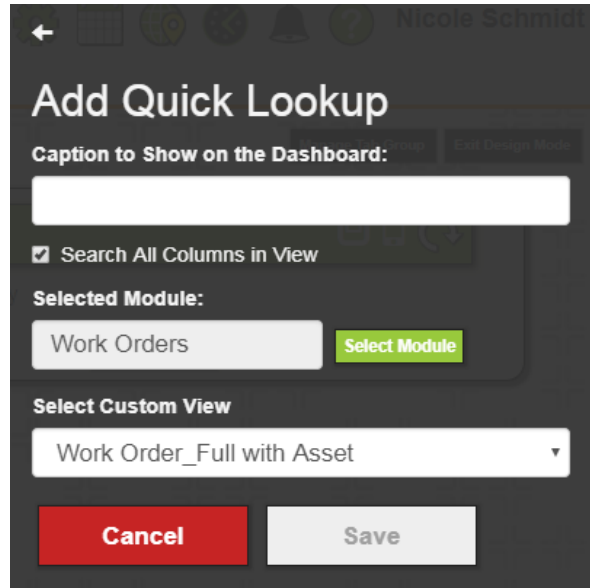
Quick Lookup

Contains Search
It applies a LIKE %[value entered]% query to the common Id for the relevant module instead of forcing the user to enter the entire number.

Search all Columns in View

Searches for the text entered in any column in the default view. Alternately, if a specific view is selected, it will search the columns in that view instead.

Search all columns is always a contains search. It will not effectively search for a full street name or a full address, but will search if you enter the street portion of the name only ("Main"). We have plans for a future release to support a better address plugin search. It works identical to this search in views:

Barcode input

Mobile applications support using a barcode for this scanning. This is one of the workflows we would recommend for mobile users who want to walk up to a piece of equipment, scan it, and open the equipment view for that record.

For iOS, click the barcode button to activate the scanner. For Android, use a barcode input keyboard which can be downloaded and configured.
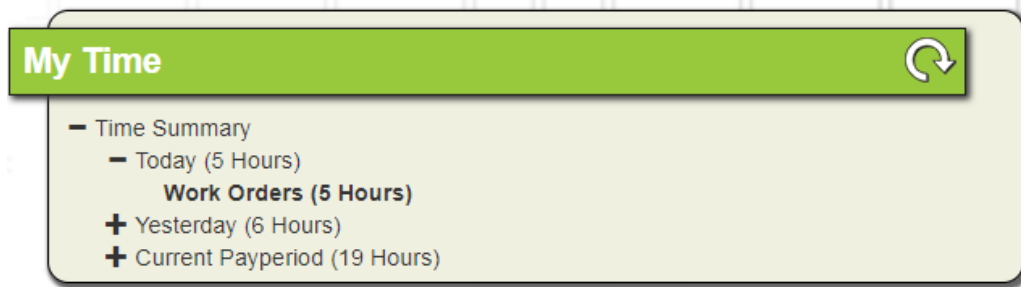
Additional Notes for Mobile

In past releases mobile did not use the custom view for this feature. This has been corrected in iOS and will be corrected in Android in the next major release (Fall 2018).

URL Plugin

- Added support for URL plugins on Lucity Mobile (iOS now, Android Fall 2018)
- Supports http, https, mailto
- Look for future scheme supports in Lucity 2019 (arcgis-collector, facetime, etc.)

Time Summary

Uses your pay period setup to automatically show the current pay period

Shows both work order time and timesheet time. Work order time is bold and clickable and opens a view with the work orders for the selected day. Timesheet entries will only show the summation of hours on the timesheet and is not clickable.

This plugin is available online mobile iOS and work orders can be opened by clicking on the link. The Android application will support viewing this in Fall 2018.

Final thoughts

Share your dashboard data drills on our support site:

https://lucity.zendesk.com/hc/en-us/community/topics/201054626-Data-Drill-Sharing

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