



TRAINING GUIDE

Accessing Data Yourself



Accessing Data Yourself

In this workbook, we'll show you how easy it is to retrieve data from the *Lucity* suite. We'll demonstrate how to use Filters and Queries in the desktop and the web, use the Locate feature, create a Browse, Export, use Subsets and run Reports by going over a series of step-by-step examples. This should help new users easily find the data they are looking for as well as provide existing users with a quick refresher course.

Table of Contents

Desktop.....	3
Example 1:	3
Filter	3
Locate.....	5
Browse	7
Export	10
Relationship Button	10
Reports	11
Example 2:	14
Filter	14
Locate.....	16
Browse	17
Reports	18
Printing Reports.....	19
Example 3:	20
Filter	20
Browse	22
Reports	23
Emailing Reports	23
Example 4:	24
Subsets.....	24
Example 5:	26
Advanced Queries.....	26
Web	28
Example 6:	28
Web Filters.....	28
Grid Filters & Sorting	29

Desktop

Example 1:

How many open work orders do we currently have?

Filter

First, we'll determine how many open work orders we have by filtering based on the Status Code.

The screenshot shows the 'Work Order Filter' dialog box, specifically Page 3. The 'Status' field is highlighted with a red box. The 'less than' operator is selected from the dropdown menu, and the value '950' is entered in the adjacent text box. The 'Status Text' field is empty. The 'Status Date' field is empty. The 'Status Time' field is empty. The 'Category' field is empty. The 'Category Text' field is empty. The 'Problem' field is empty. The 'Selected Filter' section on the right contains buttons: Make Default, Delete, Cancel, Reset, Advanced, Rename, Save As, Save, Count Records, and Go.

- On Pg. 3 of the Work Order Filter screen you'll see a field titled 'Status'. This field is used for the status code while the Status Text field is used for the description. Since we know that all open Work Orders have a Status Code of less than 950, we'll set up our filter in the following manner:
 - Select 'Less Than' from the drop-down menu beside the Status field.
 - Enter 950 in the white dialog box.
 - Your filter statement reads something like this: "I want all Work Orders with a STATUS of LESS THAN 950."

- Once you've set up your filter statement, click *Go* to access the open Work Orders.

Work Orders - Unnamed Filter Set

Work Order # 2006-01129

Status 2 New Work Order

Status Date 03/16/2006 09:57 AM

Category 91100 Residential Collection

Problem

Main Task SAR00 Residential Collections

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

Asset

Location

Cause

Assigned Crew

Supervisor 79 KURT VONHOSSEN

Lead Worker

Priority

Account # 210301.41050102

Proj No - Acct

Project Text

Reason

Assigned By

Assigned Date / / : AM

Start Date / / : AM

End Date / / : AM

Master Project ID

Name

Comment From Request

Override Notifications Problem ☐ Overdue ☐ Lead Worker ☐ Task ☐ Supervisor ☐


Record 1 of 1382 View Mode Ready...

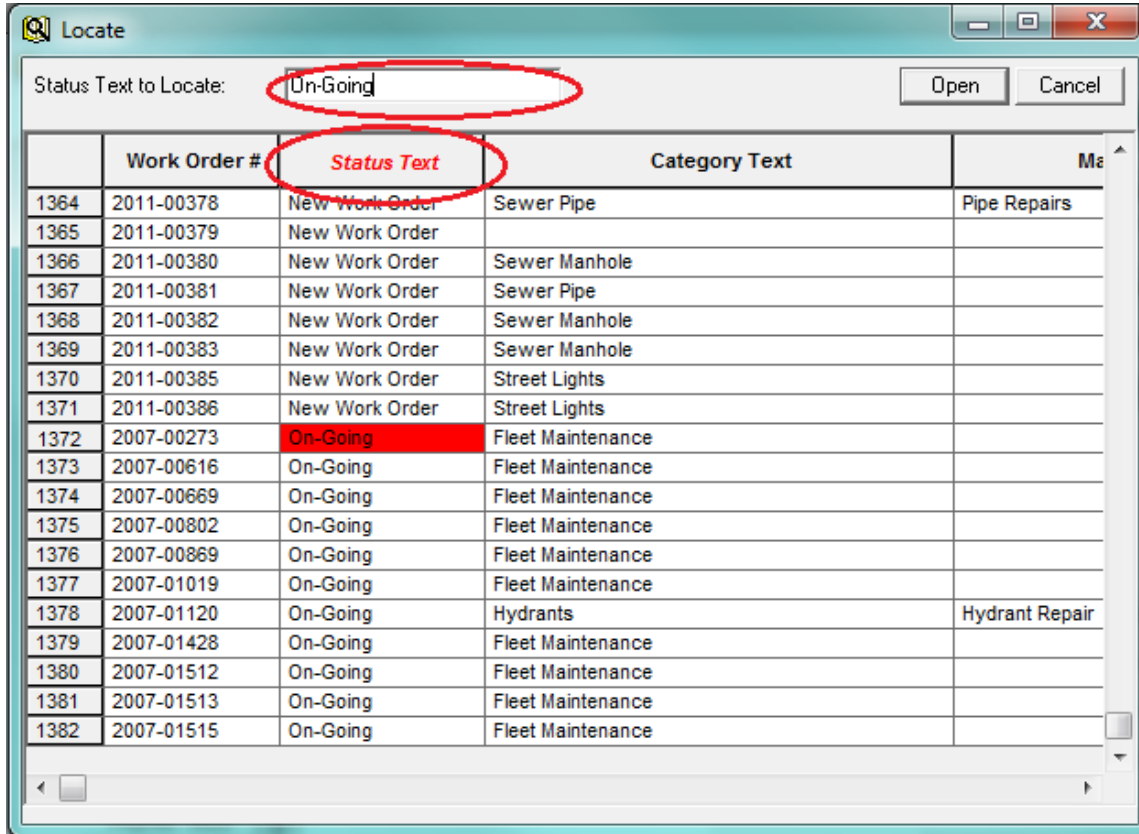
As you can see above, this dataset contains a total of 1382 open work orders (those with a status value less than 950). Since 1382 work orders are still a lot to search through, we'll discuss how to use the Locate feature next. This feature will help you further narrow down the record set.

Notes: _____

Locate

The Locate feature allows you to quickly find records within the current dataset. For example, you can use Locate to find out how many work orders have a particular status (New WO, On-Hold, etc.), are part of a certain category, have the same task, etc.

- Click  on the module toolbar to access the Locate feature.



Locate

Status Text to Locate: Open Cancel

	Work Order #	<i>Status Text</i>	Category Text	Ma
1364	2011-00378	New Work Order	Sewer Pipe	Pipe Repairs
1365	2011-00379	New Work Order		
1366	2011-00380	New Work Order	Sewer Manhole	
1367	2011-00381	New Work Order	Sewer Pipe	
1368	2011-00382	New Work Order	Sewer Manhole	
1369	2011-00383	New Work Order	Sewer Manhole	
1370	2011-00385	New Work Order	Street Lights	
1371	2011-00386	New Work Order	Street Lights	
1372	2007-00273	On-Going	Fleet Maintenance	
1373	2007-00616	On-Going	Fleet Maintenance	
1374	2007-00669	On-Going	Fleet Maintenance	
1375	2007-00802	On-Going	Fleet Maintenance	
1376	2007-00869	On-Going	Fleet Maintenance	
1377	2007-01019	On-Going	Fleet Maintenance	
1378	2007-01120	On-Going	Hydrants	Hydrant Repair
1379	2007-01428	On-Going	Fleet Maintenance	
1380	2007-01512	On-Going	Fleet Maintenance	
1381	2007-01513	On-Going	Fleet Maintenance	
1382	2007-01515	On-Going	Fleet Maintenance	

We'll use the Locate feature to find out how many open work orders have a status of 'On-Going'.

- Click the Header for the field you want to search by. Since we're looking for a particular status, we'll click the 'Status Text' header. The selected Header, 'Status Text', will now be identified in red italics.
- Type the status text, 'On-Going,' into the text-box at the top of the screen. The Locate feature will automatically jump to the first record with a Status Text of 'On-Going' and highlight that record in red.
- You can then count the listings to see that there are eleven records with a status of 'On-Going'.

Notes: _____

These same steps are used for all types of Locate searches. For example, if you need to find out how many open work orders involve Facility Doors, you can use Locate in the following manner.

- This time, click on the 'Category Text' header. It will be identified in red italics.
- Type 'Facility Door' into the text-box. The Locate feature will jump to the first record involving Facility Doors as a Category.
- As you can see below, there are two open work orders concerning Facility Doors.

Locate

Category Text to Locate:

	Work Order #	Status Text	<i>Category Text</i>	Ma
337	2007-01132	New Work Order	Facility Building	
338	2007-01558	New Work Order	Facility Building	
339	2007-01485	New Work Order	Facility Building	
340	2007-01065	New Work Order	Facility Building	
341	2007-01011	New Work Order	Facility Building	
342	2007-01012	New Work Order	Facility Building	
343	2009-00008	New Work Order	Facility Building	
344	2009-00009	New Work Order	Facility Building	
345	2011-00371	New Work Order	Facility Building	Keys Request
346	2009-00010	New Work Order	Facility Door	
347	2009-00011	New Work Order	Facility Door	
348	2009-00012	New Work Order	Facility Floor	
349	2009-00013	New Work Order	Facility Floor	
350	2009-00015	New Work Order	Facility Furnishing	
351	2009-00016	New Work Order	Facility Roof	
352	2009-00017	New Work Order	Facility Room	
353	2009-00019	New Work Order	Facility Site	
354	2009-00018	New Work Order	Facility Site Asset	
355	2009-00049	New Work Order	Fence	
356	2009-00050	New Work Order	Fiber Optics Cabling	


You can use a Locate search to find anything listed in the headers (Work Order #, Status, Task, Problem, Crew, etc.). To view more of the header search options, use the scroll bar at the bottom of the Locate screen.

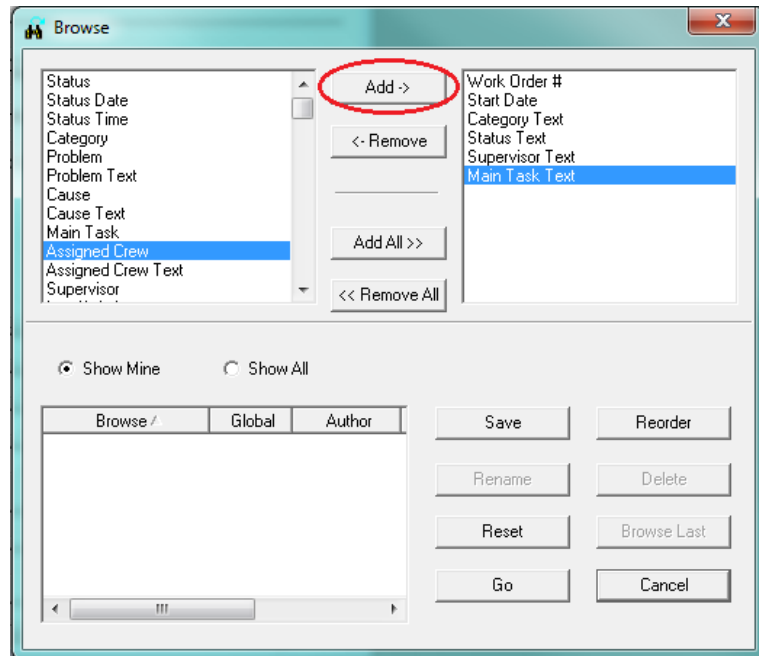
Notes: _____

Browse

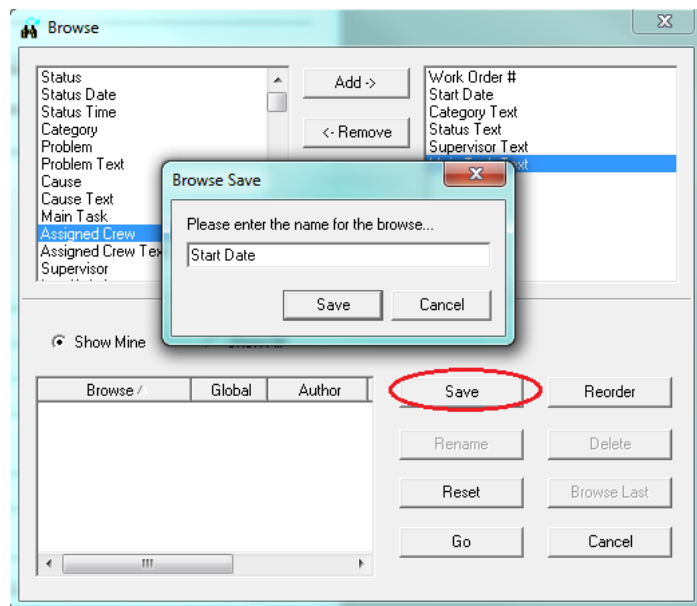
You can also use the Browse feature to search for specific records within your dataset. This feature is useful for reporting on-demand. It allows you to quickly generate a report in table format.

For example, let's use the Browse feature to sort your open work orders based on a start date.

- Click  to access the Browse feature.
- Scroll down to find the 'Start Date' field.
- Click *Add* to select Start Date.
- Add other fields to identify the records in your browse. For example, we've chosen Work Order #, Category Text, Status Text, Supervisor Text, and Main Task Text.



- If this is a Browse you'd like to use again, click the *Save* button. A new window will pop-up allowing you to name your browse.
- The Browse name will appear in the grid at the bottom left-hand corner of the screen. Next time you open the Browse screen, you can select this browse again.




Browse /	Global	Author
Start Date	No	rwilson

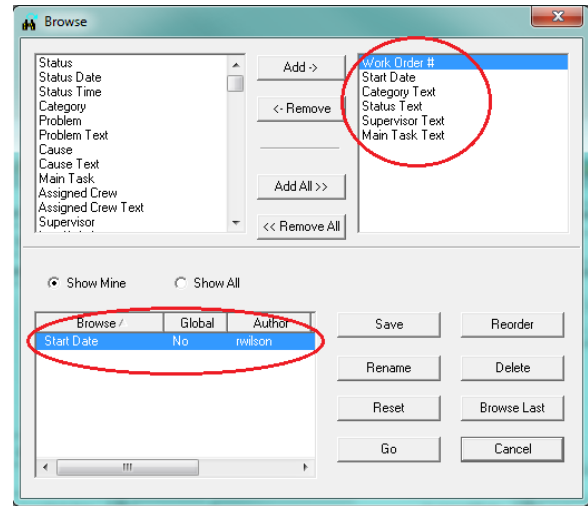
1. Click *Go* to view the Browse.
2. As you can see, this Browse report lists only the data from the fields you selected. To access an individual work order, double-click on a listing. The *Work Orders* module will open directly to that record.

Work Order #	Start Date	Category Text	Status Text	Supervisor Text	Main Task Text
2006-01128		Sewer Service	Complete		Waste Water Quality
2006-01129		Residential Collection	New Work Order	KURT VONHOSSE	Residential Collection
2006-01130		Solid Waste	Complete	EUGENE KISS	Uncontained Collection
2006-01549	06/09/06	Street Lights	Complete	JORDAN SIMPLY	Street Light Maintenance
2006-01608	07/06/06	Sewer Pipe	New Work Order	SHIELA KAMDON	Sewer Line Cleaning
2006-01609	07/06/06	Sewer Pipe	Complete	SHIELA KAMDON	Sewer Line Cleaning
2006-01610		Sewer Manhole	New Work Order	SHIELA KAMDON	SEWER OVERFLOW
2006-01611		Sewer Manhole	New Work Order	SHIELA KAMDON	
2006-01612		Sewer Manhole	New Work Order	SHIELA KAMDON	
2006-01616	07/10/06	Tree	New Work Order	MIKEY MANG	Landscape
2006-01619	07/05/06	Tree	New Work Order	MIKEY MANG	Landscape
2006-01629	07/21/06	Hydrants	Complete	COREY COLA	Hydrant Flow Test
2006-01630	07/14/06	Hydrants	Complete	COREY COLA	Hydrant Flow Test
2006-01631	07/13/06	Service Taps	Complete	COREY COLA	Service Line Installation
2006-01632	07/25/06	Service Taps	Complete	COREY COLA	Service Line Installation
2006-01633	07/20/06	Potable Mains	Complete	COREY COLA	Main Installation/Replacement
2006-01634	07/14/06	Potable Mains	Complete	COREY COLA	System Flushing
2006-01638	07/17/06	Hydrants	Complete	COREY COLA	Hydrant Flow Test
2006-01639	07/17/06	Hydrants	Complete	COREY COLA	Hydrant Flow Test

Notes: _____

You can use the Browse feature to search for many different things. For example, if you are a supervisor, you can use the Browse feature to find open work orders assigned to you.

- Click  to access the Browse feature.
- Since you already have a saved Browse, you can use it as a template and alter it as needed. This way, your Browse will show the same basic information without requiring you to select the fields again.
- Click on the saved Browse, *Start Date*, in the bottom-left grid. The selected fields will appear in the upper-right grid.
- Add additional fields or remove fields if needed. You can then save your changes.
- Click *Go* to view the Browse.
- Scroll down in the Browse report to find your name. Double-click on an individual record to access that work order.




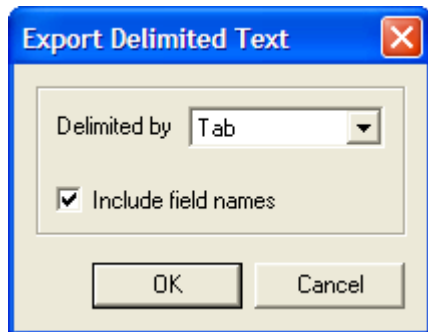
Work Order #	Start Date	Category Text	Status Text	Supervisor Text	Main Task Text
2006-01129		Residential Collecti	New Work Order	KURT VONHOSSE	Residential Collecti
2006-01608	07/06/06	Sewer Pipe	New Work Order	SHIELA KAMDON	Sewer Line Cleanin
2006-01610		Sewer Manhole	New Work Order	SHIELA KAMDON	SEWER OVERLFO
2006-01611		Sewer Manhole	New Work Order	SHIELA KAMDON	
2006-01612		Sewer Manhole	New Work Order	SHIELA KAMDON	
2006-01616	07/10/06	Tree	New Work Order	MIKEY MANG	Landscape
2006-01619	07/05/06	Tree	New Work Order	MIKEY MANG	Landscape
2006-01681		Park	New Work Order	NICK PETERS	Irrigation
2006-01732		Park	New Work Order	FOREST SCHOTTE	Sports
2006-01733		Park	New Work Order	George Butler	Turf Care
2006-01734		Park	New Work Order	FOREST SCHOTTE	Integrated Pest Mg
2006-01735	07/17/06	Park	New Work Order	FOREST SCHOTTE	Turf Care
2006-01765		Park	New Work Order		Turf Care
2006-01766		Park	New Work Order		Landscape
2006-01767	08/16/06	Park	New Work Order	DONALD BRICK	Sports
2006-01932	09/07/06	Hydrants	New Work Order	George Butler	
2006-01934	09/07/06	Hydrants	New Work Order	George Butler	
2006-02233		Park	New Work Order	FOREST SCHOTTE	Special Event Supp
2006-02234		Park	New Work Order	FOREST SCHOTTE	Special Event Supp
2006-02251		Call Center	New Work Order	SHANE HARPO	
2006-02288		Pavements	New Work Order	JASON WRIGHT	
2006-02302		Residential Recycl	New Work Order	JOHN SMITH	
2006-02304		Street Maintenance	New Work Order	TRAVIS SOX	
2006-02313	11/13/06	Facilities	New Work Order	JESUS HERNANDE	
2006-02314		Facilities	New Work Order	JESUS HERNANDE	

Hint: Because Browse does not change the sort order of the record set, the records assigned to you will be scattered throughout the report. To change this, alter the filter settings to either sort by supervisor (to see all supervisors in order) or filter for your own supervisor name.

Notes: _____


Export


Within the browse window, there is a button for exporting . This tool allows you to take your browse results and export it into a basic delimited text file. There is also an option for including field names as the first row of data.

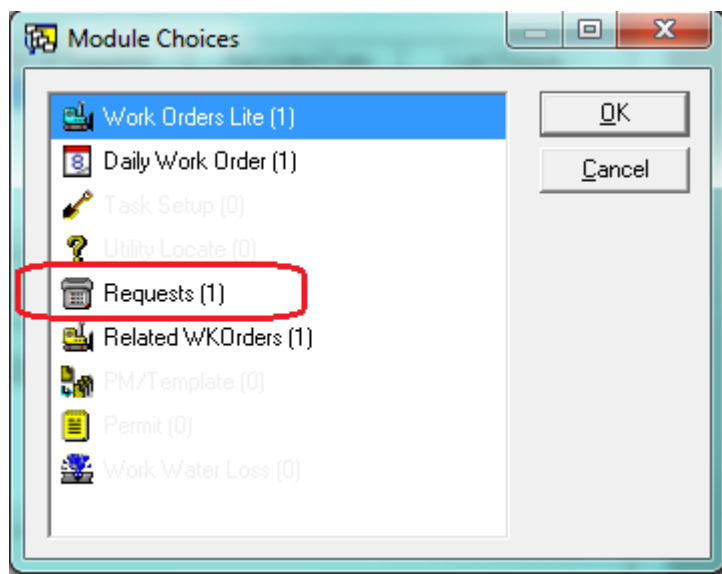


Once you've exported this .txt file, you can then easily convert into another format (i.e. Excel spreadsheet or Word document).

Relationship Button

To find additional information about your open work orders, you can use the relationship button . For example, let's go over how to access a linked request.

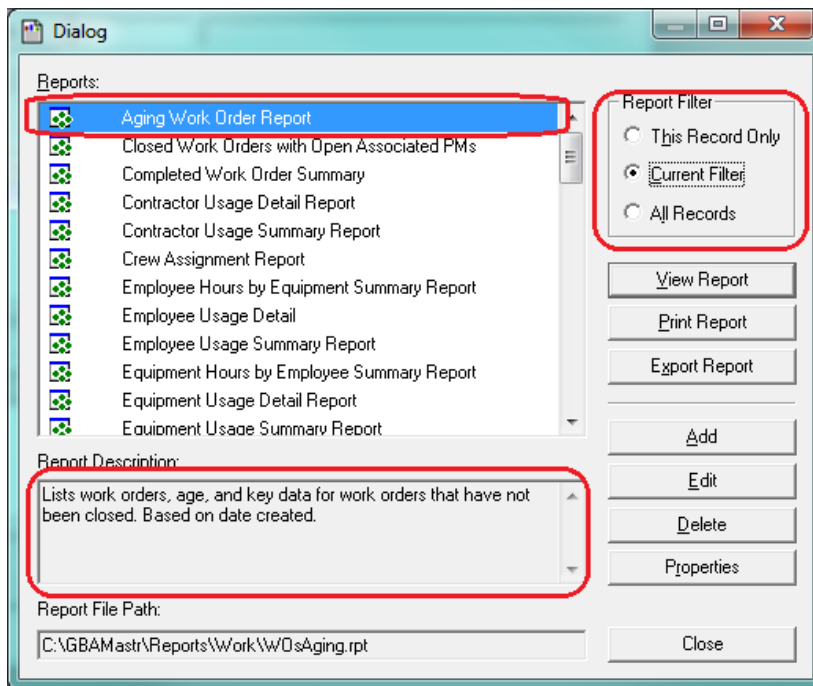
- After you've found the work order you're looking for, click  to access the Relationship screen.
- In this example, there is one related request.
- Highlight the request; then click *OK* to view that record in the *Work Requests* module.




Reports

Reports are a convenient way to view and distribute data. *Lucity™* contains a set of pre-defined reports in each module. You can use the reports to view information on your filtered records (all open work orders), or a particular record (e.g. one assigned to you as a supervisor).

For example, you can use the pre-defined reports to look at all of your open work orders and their ages in an easy-to-read format. This should give you additional information as to why the work orders are still open and if anything needs to be done to close them.



- Click  to access Reports.
- Scroll through the report names to find what you're looking for. You can read the report description at the bottom of the screen.
- The Aging Work Order Report contains the information you need.
- Note the Report Filter in the upper right-hand corner of the screen. This feature allows you to choose which records will be included in the report.
 - If you select "This Record Only", the report will only include the information on the current record.
 - If you select "Current Filter", the report will include all records in the current filtered set.
 - If you select "All Records", the report will include all records in the module.
- Make your selection (in this example, we've chosen to view an Aging Work Order Report on all open work orders in the current filter).
- Click *View Report*.
- When prompted, enter a report Subtitle (not required).

Enter Values

Please Enter a Subtitle (not required) Report Subtitle

OK Cancel

Aging Work Order Report


Preview

Aging Work Order Report

WO #	Status	Age	Create Date	Category	Problem	Action
2008-01129	New Work Order	1,009	3/18/2008	Residential Collection		Residential
2008-01808	New Work Order	1,897	7/6/2008	Sewer Pipe		Sewer Line
2008-01810	New Work Order	1,897	7/6/2008	Sewer Manhole	SEWER OVERFLOW	SEWER O
2008-01811	New Work Order	1,897	7/6/2008	Sewer Manhole		
2008-01812	New Work Order	1,897	7/6/2008	Sewer Manhole		
2008-01816	New Work Order	1,893	7/10/2008	Tree		Landscape
2008-01819	New Work Order	1,893	7/10/2008	Tree		Landscape
2008-01881	New Work Order	1,871	8/1/2008	Park		Irrigation
2008-01732	New Work Order	1,865	8/7/2008	Park		Sports
2008-01733	New Work Order	1,865	8/7/2008	Park		Turf Care
2008-01734	New Work Order	1,865	8/7/2008	Park		Integrated I
2008-01735	New Work Order	1,865	8/7/2008	Park		Turf Care
2008-01765	New Work Order	1,856	8/16/2008	Park		Turf Care
2008-01768	New Work Order	1,856	8/16/2008	Park		Landscape
2008-01767	New Work Order	1,856	8/16/2008	Park		Sports
2008-01932	New Work Order	1,834	9/7/2008	Hydrants		
2008-01934	New Work Order	1,834	9/7/2008	Hydrants		
2008-02233	New Work Order	1,787	10/24/2008	Park		Special Eve
2008-02234	New Work Order	1,787	10/24/2008	Park		Special Eve
2008-02251	New Work Order	1,781	10/30/2008	Call Center	Info - Building Maintenance	
2008-02288	New Work Order	1,778	11/2/2008	Pavements	Pickup - Roadway Debris	
2008-02302	New Work Order	1,778	11/2/2008	Residential Recycling Collection	REC - Miscellaneous	
2008-02304	New Work Order	1,778	11/2/2008	Street Maintenance	Road Repair	
2008-02313	New Work Order	1,777	11/3/2008	Facilities	custodial	
2008-02314	New Work Order	1,777	11/3/2008	Facilities	custodial	
2008-02315	New Work Order	1,777	11/3/2008	Facilities	keys & locks	

Here, you can see that the Aging Work Order Report lists all Work Order Numbers, their Statuses, Categories, Problems, Actions, and other useful information. You can print the report or export it to email using the toolbar at the top of the report window.

The report we just discussed dealt with detailed information about multiple work orders; however, that's just one of the features of our pre-defined reports. For the work orders, we also offer standardized forms that can be submitted to the work crew for completion.

- To access these forms, click  to open the Report window.
- Scroll down to find the form you're looking for. A description of the form appears at the bottom of the screen
 - Individual forms are available for various assets. Since the record we're currently looking at deals with a sewer pipe stoppage, we've chosen the Work Order Form Report with Sewer Assets.

-
- Dialog
- Reports:
- Work Order Form Report with Facility Assets
 - Work Order Form Report with Fleet/Equipment Assets
 - Work Order Form Report with General Assets
 - Work Order Form Report with Park Assets
 - Work Order Form Report with Sewer Assets**
 - Work Order Form Report with Solid Waste Assets
 - Work Order Form Report with Storm Assets
 - Work Order Form Report with Transportation Assets
 - Work Order Form Report with Water Assets
 - Work Order Listing By Street Report
 - Work Order Listing Report
 - Work Order Listing Report By Facility
- Report Filter:
- ☒ This Record Only
 - ☐ Current Filter
 - ☐ All Records
- View Report
- Print Report
- Export Report
- Add
- Edit
- Delete
- Properties
- Report Description:
- Form used for office generated Work Orders (including asset data) to be printed and submitted to crews for completion.
- Report File Path:
- C:\GBMAstr\Reports\Work\WOFrmSewerAsset.rpt
- Close

This particular form includes information about the Work Order, Requester information, comments for the crew, checklist items, and a recording log. You can use the log to track employee hours along with materials and fluids used.

Example 2:

How many work orders were created in July 2006 and assigned to Jesus Hernandez as a Supervisor?

Filter

To determine how many work orders were created in July 2006 and assigned to Don Lancaster, we'll need to set up a filter using two fields.

- First, on Pg. 3 we'll filter for the Status Date. For new work orders, the status date will be the day the work order was created.
 - Select 'Between' from the drop-down menu by the Status Date field.
 - Enter the first and last day of the month (November 1, 2006 and November 30, 2006) in the fields provided.
 - Your filter statement reads something like this: "I want all Work Orders with a STATUS DATE BETWEEN NOVEMBER 1ST AND NOVEMBER 30TH, 2006."

Work Order Filter

Filter | Sort | Pg. 3 | Pg. 4 | Pg. 5 | Pg. 6 | Pg. 7 | Pg. 8 | Pg. 9 | Pg. 10 | Address | 2nd | Selected Filter:

Work Order # <None>

Status less than 950

Status Text <None>

Status Date between 11/01/2006 11/30/2006 : AM

Category <None>

Category Text <None>

Problem <None>

Make Default

Delete

Cancel

Reset

Advanced

Rename

Save As

Save

Count Records

Go

Notes: _____

- Next, on Pg. 5 we'll filter for the Supervisor Text (supervisor name).
 - Select 'Equal' from the drop-down menu beside the Supervisor Text field.
 - Scroll down in the list provided and highlight Don Lancaster's name.
 - Your filter statement reads something like this: "I want all records with SUPERVISOR EQUAL to JESUS HERNANDEZ."


The screenshot shows the 'Work Order Filter' window. At the top, there are tabs for 'Filter', 'Sort', and a series of page tabs from 'Pg. 3' to 'Pg. 10'. The 'Filter' tab is active. Below the tabs, there are several filter criteria: 'Supervisor', 'Supervisor Text', 'Lead Worker', 'Lead Worker Text', 'Priority', 'Priority Text', 'Account #', and 'Proj No - Acct'. The 'Supervisor Text' field is highlighted with a red rectangle. It has a dropdown menu set to 'equal' and a list of names: 'George Butler', 'JASON WRIGHT', and 'JESUS HERNANDEZ'. 'JESUS HERNANDEZ' is highlighted in blue. To the right of the filter fields, there is a 'Selected Filter:' section with buttons: 'Make Default', 'Delete', 'Cancel', 'Reset', 'Advanced', 'Rename', 'Save As', 'Save', 'Count Records', and 'Go'.

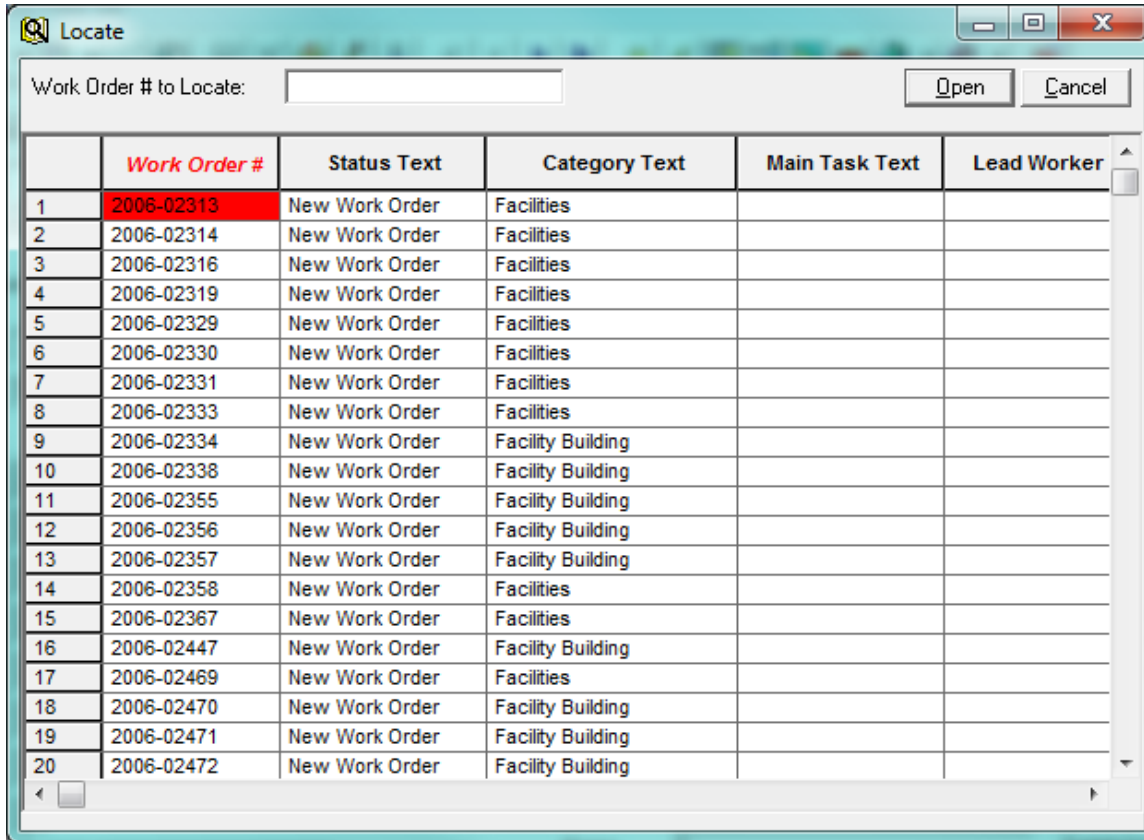
- The two combined filter statements will search for all records created in November 2006 AND assigned to Jesus Hernandez. To determine how many records are in the current filter, click **Count Records** and the following screen will appear:

The screenshot shows the 'Record Count' window. It has a title bar with a close button. Inside, there is a small icon of a document with a green checkmark. To the right of the icon, there are two text fields: 'Total number of records:' with the value '3254' and 'Number of records after current filter:' with the value '48'. At the bottom center, there is an 'OK' button.

- Click **Go** to access the records in your newly filtered set. The *Work Orders* module will display only 48 records.

Locate

Now that you've filtered through the work orders to find those created in July 2006 and assigned to Don Lancaster, you can use the Locate feature to see a list of only those records. Click  to access the Locate screen.




The 'Locate' window displays a table of work orders. The first row is highlighted in red. The table has six columns: an index column, 'Work Order #', 'Status Text', 'Category Text', 'Main Task Text', and 'Lead Worker'.

	<i>Work Order #</i>	Status Text	Category Text	Main Task Text	Lead Worker
1	2006-02313	New Work Order	Facilities		
2	2006-02314	New Work Order	Facilities		
3	2006-02316	New Work Order	Facilities		
4	2006-02319	New Work Order	Facilities		
5	2006-02329	New Work Order	Facilities		
6	2006-02330	New Work Order	Facilities		
7	2006-02331	New Work Order	Facilities		
8	2006-02333	New Work Order	Facilities		
9	2006-02334	New Work Order	Facility Building		
10	2006-02338	New Work Order	Facility Building		
11	2006-02355	New Work Order	Facility Building		
12	2006-02356	New Work Order	Facility Building		
13	2006-02357	New Work Order	Facility Building		
14	2006-02358	New Work Order	Facilities		
15	2006-02367	New Work Order	Facilities		
16	2006-02447	New Work Order	Facility Building		
17	2006-02469	New Work Order	Facilities		
18	2006-02470	New Work Order	Facility Building		
19	2006-02471	New Work Order	Facility Building		
20	2006-02472	New Work Order	Facility Building		

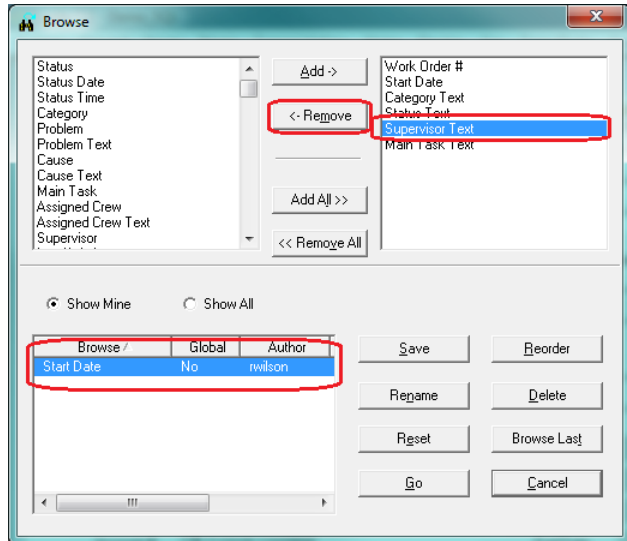
Double-click on an individual record to access that work order.

Notes: _____

Browse

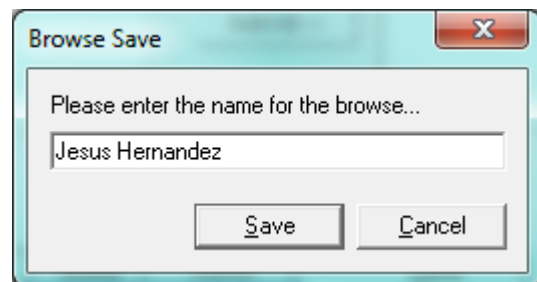
To create a Browse report for your filtered records, click . This time, we'll use the previously saved browse, but alter it to suit our purposes.

- Click on the saved Browse, *Start Date*. The Browse fields will appear in the box at the upper-right corner of the screen.
- Highlight 'Supervisor Text' and click the *Remove* button. We'll no longer need this field in our Browse report since all of our filtered records are for Jesus Hernandez.



- Click *Save* and enter a new name for the Browse. We've titled this Browse, *Jesus Hernandez*.
- As you can see below, we now have two saved Browse reports.

Browse /	Global	Author
Jesus Hernandez	No	rwilson
Start Date	No	rwilson




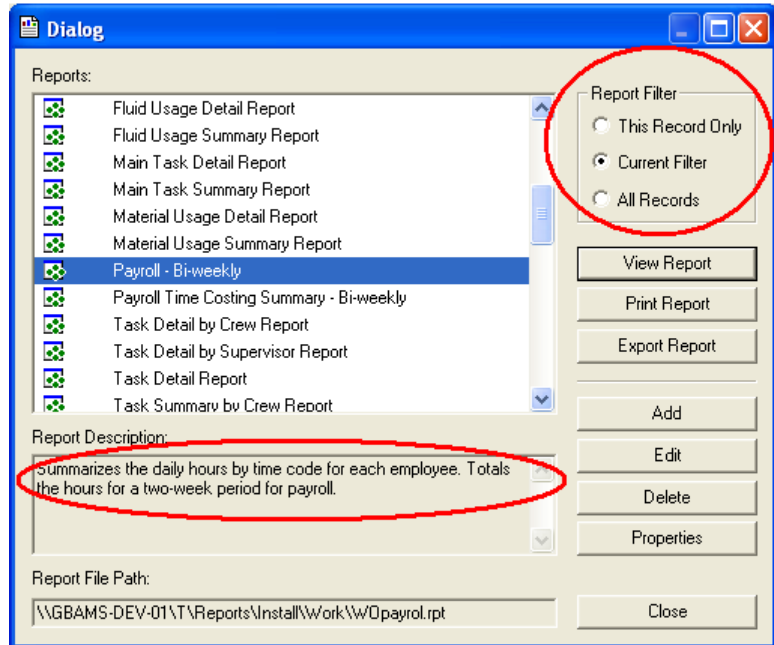
- Click *Go* to view the Browse.


Work Order #	Start Date	Category Text	Status Text	Main Task Text
2006-02541		Facilities	New Work Order	
2006-02542		Facilities	New Work Order	
2006-02543		Facility Building	New Work Order	
2006-02544		Facilities	New Work Order	
2006-02555		Facilities	New Work Order	
2006-02557		Facilities	New Work Order	
2006-02558		Facilities	New Work Order	
2006-02569		Facilities	New Work Order	
2006-02570		Facilities	New Work Order	
2006-02577		Facility Building	New Work Order	
2006-02582		Facilities	New Work Order	

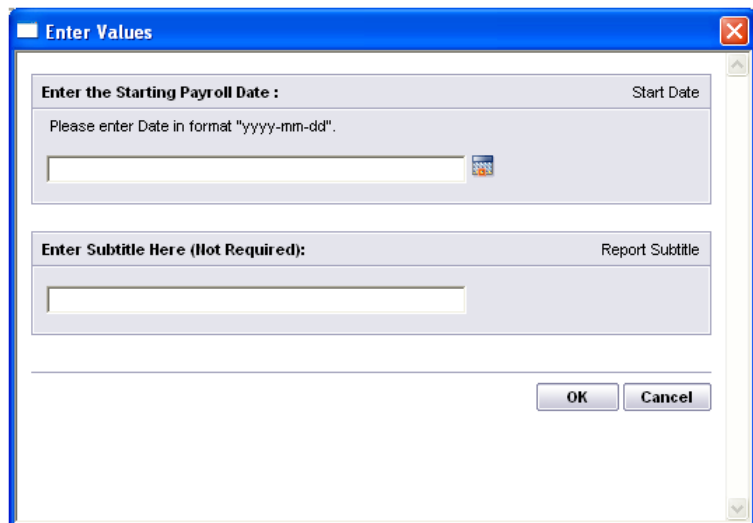
Reports

Our pre-defined reports have many useful functions. For example, a bi-weekly payroll report is included in our system. Now that Jesus Hernandez has access to all work orders created in November 2006 and assigned to him, he may want to see how many payroll hours he has towards those work orders. To find the payroll report, complete the following steps:

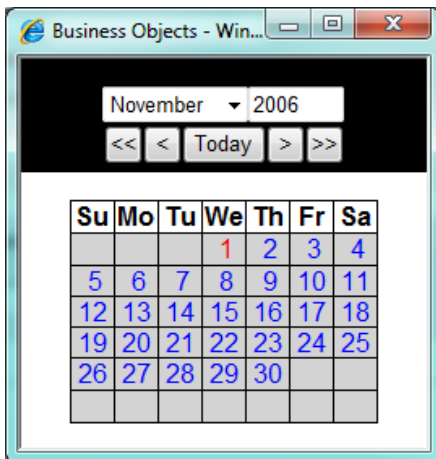
- Click  on the module toolbar to access Reports.
- Scroll down to find the Payroll - Bi-weekly report. The report description is found at the bottom of the screen. This report summarizes the daily hours for each employee and totals those hours for a two-week pay period.
- Remember to select which records will be included in the report using the Report Filter.
- Click *View Report*.




- You'll need to enter a start date for the report. You can type a date in the white field using the 'yyyy-mm-dd' format, or you can click on the calendar icon  to select a date.

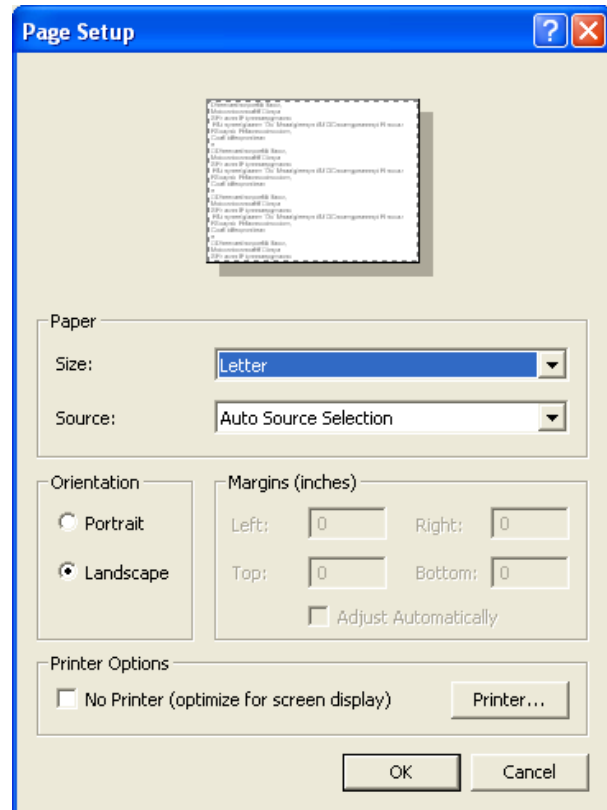


The 'Enter Values' dialog box has two main sections. The first section is 'Enter the Starting Payroll Date' with a 'Start Date' label and a text field. The second section is 'Enter Subtitle Here (Not Required)' with a 'Report Subtitle' label and a text field. There are 'OK' and 'Cancel' buttons at the bottom right.

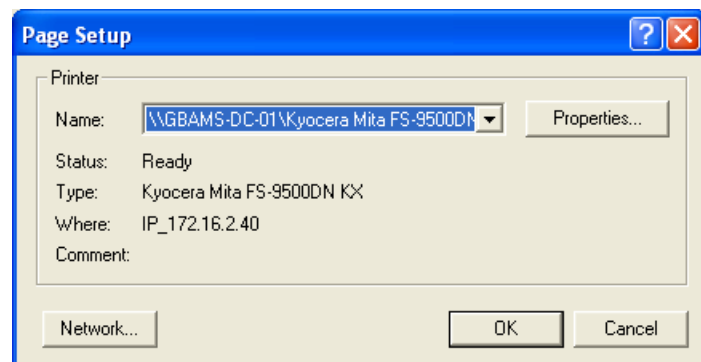


Printing Reports

- Click  on the module toolbar to access reports.
- Scroll down in the Reports dialog box to find the report you need.
- Click *Print Report* and the Page Setup window will appear:
- Select your paper size, source, and orientation.



- Click the *Printer* button to change your default printer.
- Click *OK* to print.



Example 3:

How many work orders involve Hydrant Maintenance or Hydrant Repair?

Filter

We'll determine how many work orders required Hydrant Maintenance or Hydrant Repair by filtering for the Main Task Text.

Work Order Filter

Filter | Sort | Pg. 3 | **Pg. 4** | Pg. 5 | Pg. 6 | Pg. 7 | Pg. 8 | Pg. 9 | Pg. 10 | Address | 2nd | Selected Filter:

Problem Text: <None>

Cause: <None>

Cause Text: <None>

Main Task: <None>

Main Task Text: in list

- Hydrant Maintenance
- Hydrant Meter Install
- Hydrant Meter Remove

Assigned Crew: <None>

Assigned Crew Text: <None>

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

Also

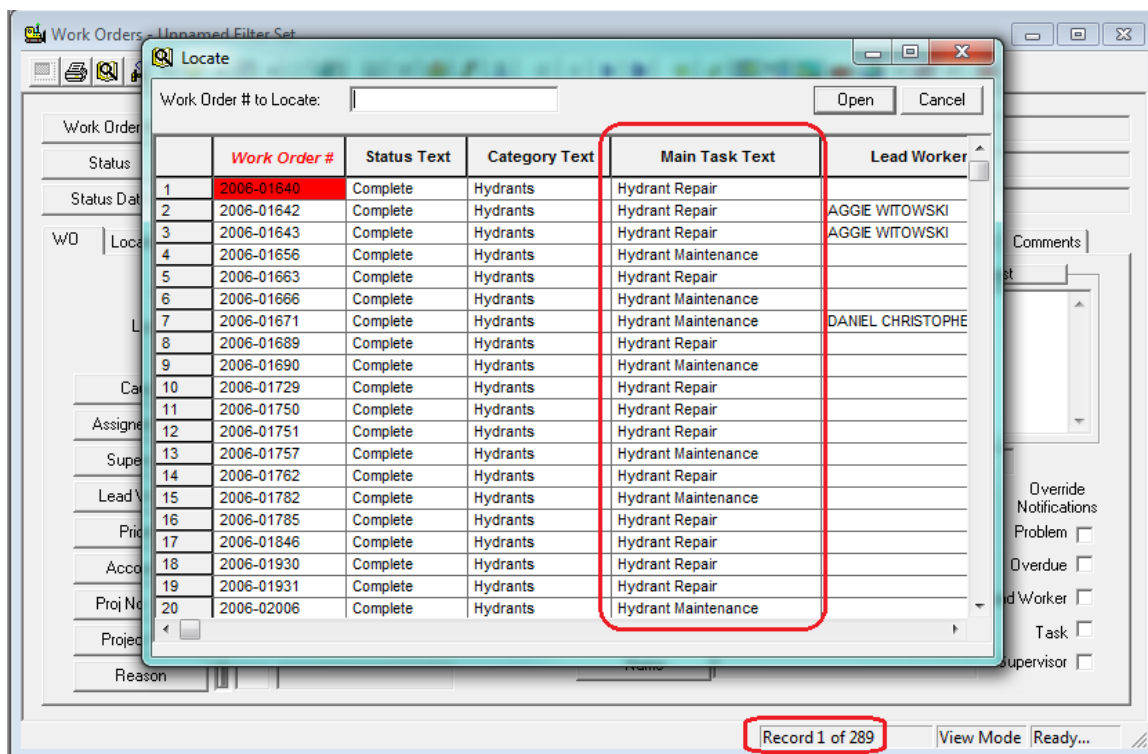
Main Task Text


in list

- Hydrant Reflector - Install
- Hydrant Repair
- Hydrant Replace

- On Pg. 4 of the Work Order Filter screen, you'll see a field titled Main Task Text. The Main Task field contains the code while the Main Task Text field contains the description.
 - Since we are seeking multiple tasks, to get a full record set, we'll filter for all applicable tasks.
 - Select 'In List' from the drop-down menu.
 - Highlight Hydrant Maintenance, and Hydrant Repair.
 - Your filter statement reads something like this: "I want all records where the MAIN TASK TEXT is HYDRANT MAINTENANCE, and HYDRANT REPAIR."

- Once you've set up your filter statement, click *Go* to access your Hydrant records.



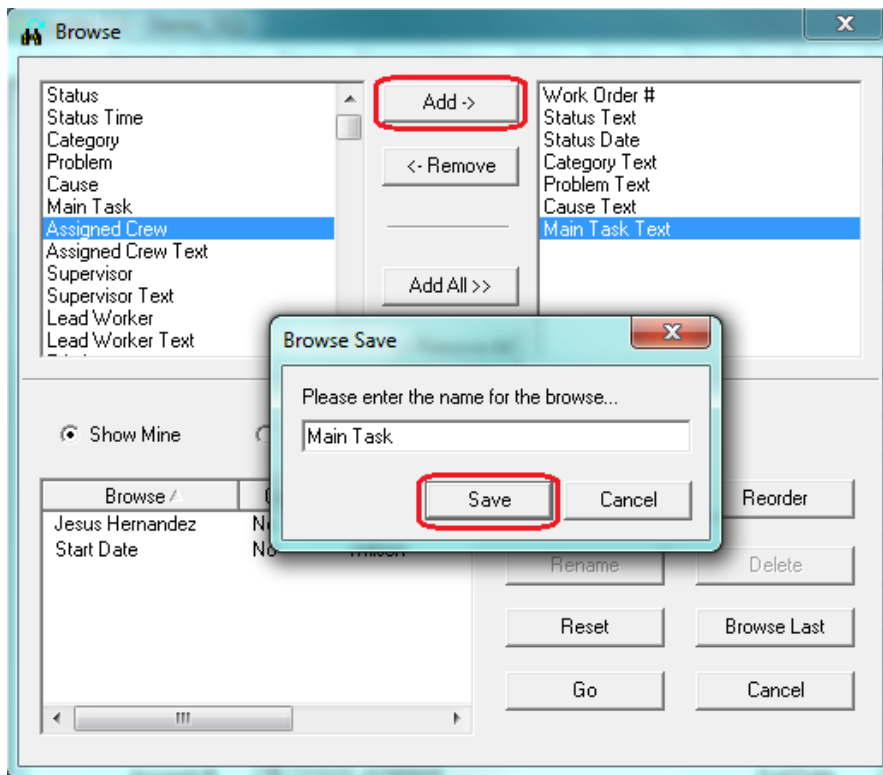
As you can see, this filter found seven records where the main task involved Hydrant Repair or Hydrant Maintenance. By clicking on the Locate button , you can see a list of those seven records. Double-click on a record to jump to that work order.

Notes: _____

Browse

Let's use the Browse feature to view detailed information in a report format. For this report, we've selected Work Order #, Status Text, Status Date, Category Text, Problem Text, Cause Text, and Main Task Text.

Save the Browse and then click *Go* to view the Browse report.




The screenshot shows the 'Browse - Work Orders' report window. It contains a table with the following data:

Work Order #	Status Text	Status Date	Category Text	Problem Text
2006-01640	Complete	07/20/06	Hydrants	WATER LEAK - HYDRANTS
2006-01642	Complete	07/20/06	Hydrants	WATER LEAK - HYDRANTS
2006-01643	Complete	07/20/06	Hydrants	WATER LEAK - HYDRANTS
2006-01656	Complete	07/24/06	Hydrants	
2006-01663	Complete	07/25/06	Hydrants	
2006-01666	Complete	07/26/06	Hydrants	
2006-01671	Complete	07/28/06	Hydrants	
2006-01689	Complete	08/03/06	Hydrants	
2006-01690	Complete	08/04/06	Hydrants	
2006-01729	Complete	08/07/06	Hydrants	

At the bottom of the window, there is a navigation bar with 'Record 1' and various navigation icons.

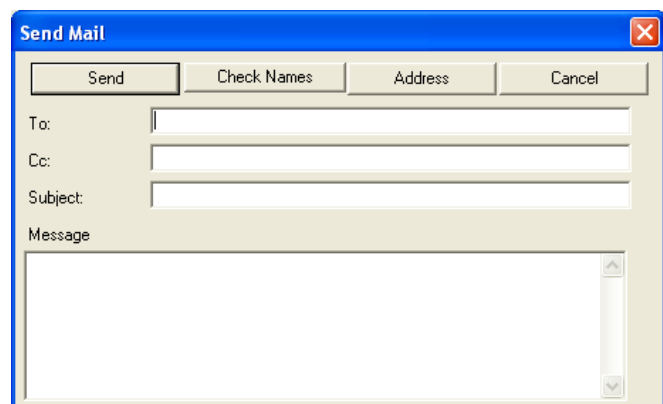
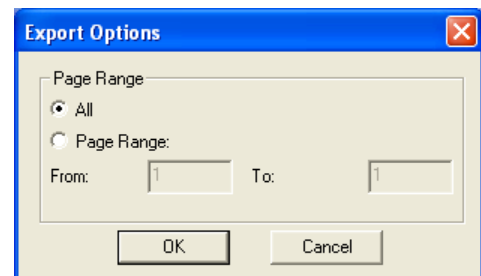
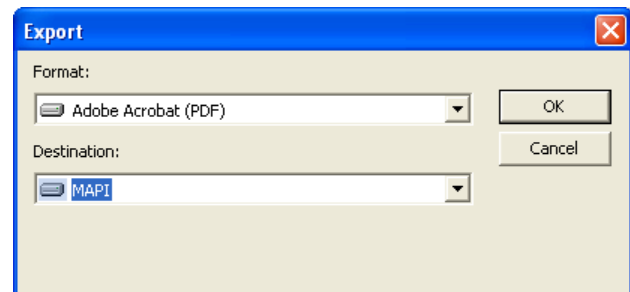
Reports

Once again, let's look at the pre-defined reports. You can use these to view information about our hydrant work orders in a clear and concise format.

- Click  to access the Reports list.
- Remember, the Report Description appears at the bottom of the screen.
 - For this example, we've selected the 'Task Detail by Crew Report'. This report lists the work order #, task start and end dates, UOM, units, task cost, average cost, and summary information for the crew.
- Make your selection in the Report Filter box.
 - For this example, we've chosen Current Filter. Our report will include data on all seven work orders involving hydrant maintenance.
- You can click *View Report* to preview the report as before.
- You can also email the report. Let's go over this function now.

Emailing Reports

- Click *Export* to open the Export window.
- Select the format for the report. Here, we've chosen Adobe Acrobat (PDF).
- Select the report destination. We've chosen Microsoft Mail (MAPI).
- Click *OK* when complete. The Export Options window will appear.
- Select the page range and click *OK*.
- On the Send Mail screen, enter the address of the recipient and a message if needed. Click the *Send* button when you are finished.



Example 4:

What work has been done on pipes from the Mill Creek benefit district?


Subsets

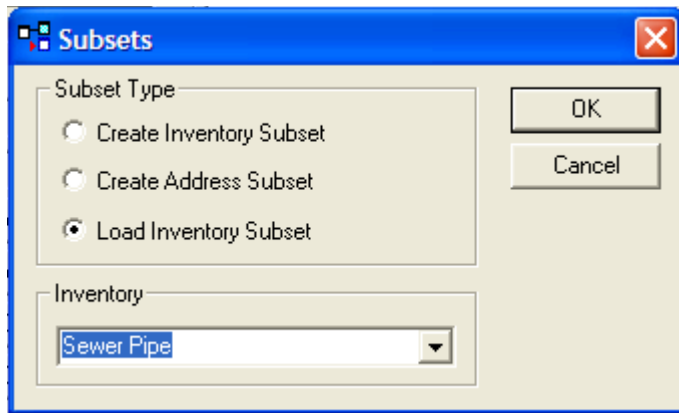
One of the ways to see the work done on multiple sewer pipes is to create a subset of pipes. You may create a subset from the map (based on spatial location). You can also create subsets based on assets loaded into a filter set.

- First filter for a set of pipes.

This screenshot shows a form for selecting a benefit district. It includes two dropdown menus: 'Benefit District' with '<None>' selected, and 'Benefit District Text' with 'in list' selected. To the right is a list box containing three options: 'Cedar Creek District', 'Indian Creek District', and 'Mill Creek District'. The 'Mill Creek District' option is currently selected and highlighted in blue.

This screenshot shows the 'Sewer Pipe Inventory - Unnamed Filter Set' window. The window has a toolbar at the top and a main area with various input fields and tabs. The 'Attributes' tab is active. In the 'Attributes' section, the 'Benefit District' field is highlighted with a red box and contains the value '1 Mill Creek District'. Other fields include 'Pipe Rec #', 'Alt Pipe ID', 'US Structure', 'DS Structure', 'Date Constructed', 'Project Number', 'Index', 'US Station', 'DS Station', 'Surface', 'Bedding', 'Cleaning Area', 'District', 'Sec-Twn-Ring', 'Trap Area', 'Improve Method', 'Upstream Count', 'Ignore in Model', 'Criticality', 'Upsize Dia Needed', 'Consequence of Failure', 'Probability of Failure', 'Risk', 'Replacement Cost', 'Replacement Value', 'Replacement Date', 'Present Value', and 'Remaining Life'. At the bottom right, a status bar shows 'Record 1 of 74' highlighted with a red box.

- You can see, our filter gives us 74 pipes that are located in the Mill Creek benefit district.
- Select the Subset tool from the toolbar .
 - Select New.
 - Name the subset.
- Open up the work order module. Hit the subset tool from there. Select Load Inventory Subset, then select the type of asset inventory you are selecting. In this case, it is a Sewer Pipe inventory subset:



- Click "Ok." A list of available inventory subsets will display. Select the subset Mill Creek Sewer Pipes, then hit "Load."
- The resulting filterset of work orders will display any work orders that include any asset within the created subset.

NOTE: It is possible to have work orders that include assets that are not included in the subset. Only one of the assets needs to be in the subset for that work order to be selected.

NOTE: Subsets are not dynamic. If you add or remove a pipe from that benefit district by changing the attribute, the pipe will remain in the subset. You must recreate the subset after changes are made.

Notes: _____

Example 5:

What work orders has Aggie Witowski been a resource on?

Advanced Queries

Sometimes the field you are trying to filter on is not available through the provided filter fields. It is possible to write advanced queries to query on child or linked tables. In this example, we will look at a child table (Work Order Resources) to determine what work orders a certain employee has been added to as a resource.

If you go to any child table, you can use the CTRL+Right-click function to get more information on a certain field. This allows you to see what the “behind-the-scenes” name is for each field. In the work order resource table, the resource name field is “WR_RSRC_TY”. You can see this module is pulling information from a table called WKRESRCE.

Norm	Regular	OT	Total	Estimated			
2.0	7.00	0.00	9.00	0.00			
22.711	22.711	34.066	45.42	158.98	0.00	204.40	0.00

Notes: _____

After selecting the Filter button in a module, you can switch between “Standard” and “Advanced” filter views using the button on the right. This will display a field where you can create and customize advanced queries. The windows in the bottom display available table and field names, as well as SQL keywords and operators.

Work Order Filter

Advanced SQL | Report SQL

SELECT * FROM

WKORDER LEFT JOIN WKRESRCE ON WO_ID=WR_WO_ID WHERE
WKRESRCE.WR_RSRC_TY = 'Aggie Witowski'

Add Tables & Fields

- CMADDR
- CMNOTIF
- EDEN_ACCTNO
- EDEN_CUSTOMER
- EDEN_PARCADD
- EDEN_PARCADDOWN
- EDEN_PROJNO

Add SQL Keywords

- Common Keywords
- Operators
- Join Keywords

Selected Filter:

Make Default

Delete

Cancel

Reset

Standard

Rename

Save As

Save

Count Records

Go

You can save these queries just as you would a standard query.

Notes: _____

Web



Example 6:

How many open work orders do we currently have? How many are from a specific month?

Web Filters

First, we'll determine how many open work orders we have by filtering based on the Status Code field.

The screenshot shows a dialog box titled "Add Filter". At the top, there is a text field labeled "Filter Name:" with the text "Open Work Orders" entered. Below this, there are two tabs: "Build-A-Filter" and "Advanced". The "Build-A-Filter" tab is active and shows a list of filter criteria. The first criterion is "Work Orders" (selected from a dropdown), "Status" (selected from a dropdown), "Less Than" (selected from a dropdown), and the value "950" in a text field. At the bottom of the dialog, there are four buttons: "Cancel", "Count", "Save", and "Run".

- Select the filter button from the toolbar  and then  to add a new filter:
 - Give the filter a name.
 - Select which module you want to create the filter against.
 - Select the field you want to filter on, the parameters, and a value.
 - Repeat this to continue to add more filter criteria.

- Once you've set up your filter statement, click *Run* to access the open Work Orders.

Work Order #	Status	Status Text	Category Text	Main Task Text	Problem Text	Address	Street Direction	Street Name
2013-00040	2	New Work Order	SSES Rehab Proj 1 MH			1564	E	VALENCIA
2013-00039	2	New Work Order	Street Lights	SL - Install New		2165	E	RANCH
2013-00038	2	New Work Order	Hydrants	Hydrant Repair	Hydrant Leak	26343	E	CANYON
2013-00037	2	New Work Order	CIP Projects					
2013-00036	2	New Work Order	Street Lights			2165	E	RANCH
2013-00035	2	New Work Order	Traffic Signs	Traffic Sign Install	Sign - Replace			
2013-00034	2	New Work Order	Traffic Signs					
2013-00033	2	New Work Order	Detention Basins	Structure Inspection	Clogged Catch Basin / Scupper - Arterial			
2013-00032	2	New Work Order	Meters		Leak at Meter			
2013-00031	2	New Work Order	Hydrants	Hydrant Painting		2754	E	EAGLE

Total Filter Records: 3815 Total Module Records: 3815

Grid Filters & Sorting



Each field within the grid has its own sort and filter functions to find records quickly. You can use these to sort the values numerically or alphabetically, or filter for a specific value or criteria. We will use these to narrow down our Open Work Order filterset for the work orders that have a status date from May 2013.

- Click on any field in the grid you want to filter on. We will filter on the Status Date field.

No filter currently set

Between

5/1/2013 and 5/31/2013

Clear Clear All Filters Apply

- Click “Apply”. You can see that the filterset is now displaying only 13 results from the original filterset.

Work Orders


Work Orders 10 1 of 2 GO > >>

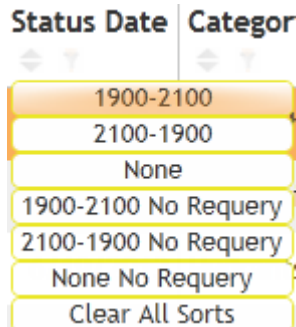
#	Status	Status Text	Status Date	Category Text	Main Task Text	Problem Text	Address	Street Direction	S
2	New Work Order	5/29/2013	Traffic Signs						
2	New Work Order	5/29/2013	Detention Basins	Structure Inspection	Clogged Catch Basin / Scupper - Arterial				
2	New Work Order	5/29/2013	Meters		Leak at Meter				
2	New Work Order	5/13/2013	Hydrants	Hydrant Painting			2754	E	E
2	New Work Order	5/13/2013	Meters	Meter Repair	Leak at Meter				
2	New Work Order	5/10/2013	Hydrants	Hydrant Flushing			2643	S	E
2	New Work Order	5/10/2013	Hydrants	Hydrant Flushing			2643	S	E
2	New Work Order	5/10/2013	Facilities		New Asset Install				
2	New Work Order	5/7/2013	Public Works Department						
2	New Work Order	5/1/2013	Solid Waste	Uncontained Collections					

Total Filter Records: 13 Total Module Records: 3815

- You can apply filters against multiple fields. If you want to remove individual field filters, you can click the filter button again and select “Clear” or “Clear All Filters”.
- You can also use the sort function on each individual field.

Notes: _____

- Click  on the header of any column you wish to sort.
- Select a sorting option from the list. We will sort by the Status Date field in order to show the oldest work orders first.



Work Orders									
#	Status	Status Text	Status Date	Category Text	Main Task Text	Problem Text	Address	Street Direction	Street Name
2	New Work Order		5/1/2013	Solid Waste	Uncontained Collections				
2	New Work Order		5/1/2013	Traffic Signs			2165	E	F
2	New Work Order		5/7/2013	Public Works Department					
2	New Work Order		5/9/2013	Facility Building	Inspection				
2	New Work Order		5/9/2013	Facility Building	Inspection				
2	New Work Order		5/10/2013	Hydrants	Hydrant Flushing		2643	S	E
2	New Work Order		5/10/2013	Hydrants	Hydrant Flushing		2643	S	E
2	New Work Order		5/10/2013	Facilities		New Asset Install			
2	New Work Order		5/13/2013	Hydrants	Hydrant Painting		2754	E	E
2	New Work Order		5/13/2013	Meters	Meter Repair	Leak at Meter			

Total Filter Records: 13 Total Module Records: 3815

You can always see which fields currently have sorts/filters applied to them by the highlighted buttons on the column headers.

#	Status	Status Text	Status Date	Category Text	Main Task Text	Problem Text
	