



TRAINING GUIDE

Lucity Basic Functionality



Lucy - Basic Functionality

In this workbook, we'll introduce you to the basic layout and functionality of the Lucy system. This includes menus, form layout, fields, toolbars, adding/editing/deleting records, finding records, and filtering records. We'll also introduce you to Asset Management and Work Management.

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Introduction to Asset Management

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

System Inventory

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

Field Inspection

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

Notes: _____

Introduction to Work Management

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

Work Orders

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

Mobile Work

Mobile Desktop allows you to upload and download work orders to and from the field. In this manner, you can mobilize your work management database. This solution is available for handheld devices, tablets, and laptop PCs.

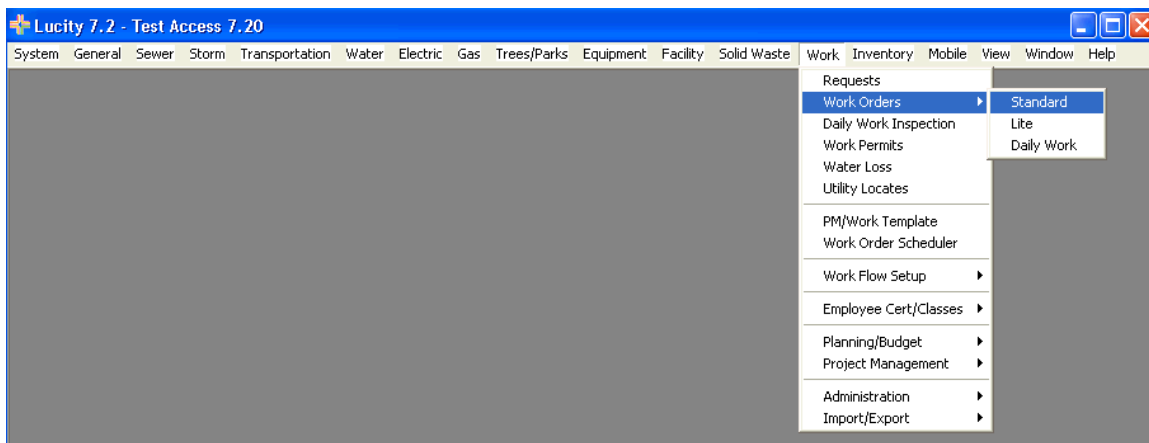
Notes: _____

Menus

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



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



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

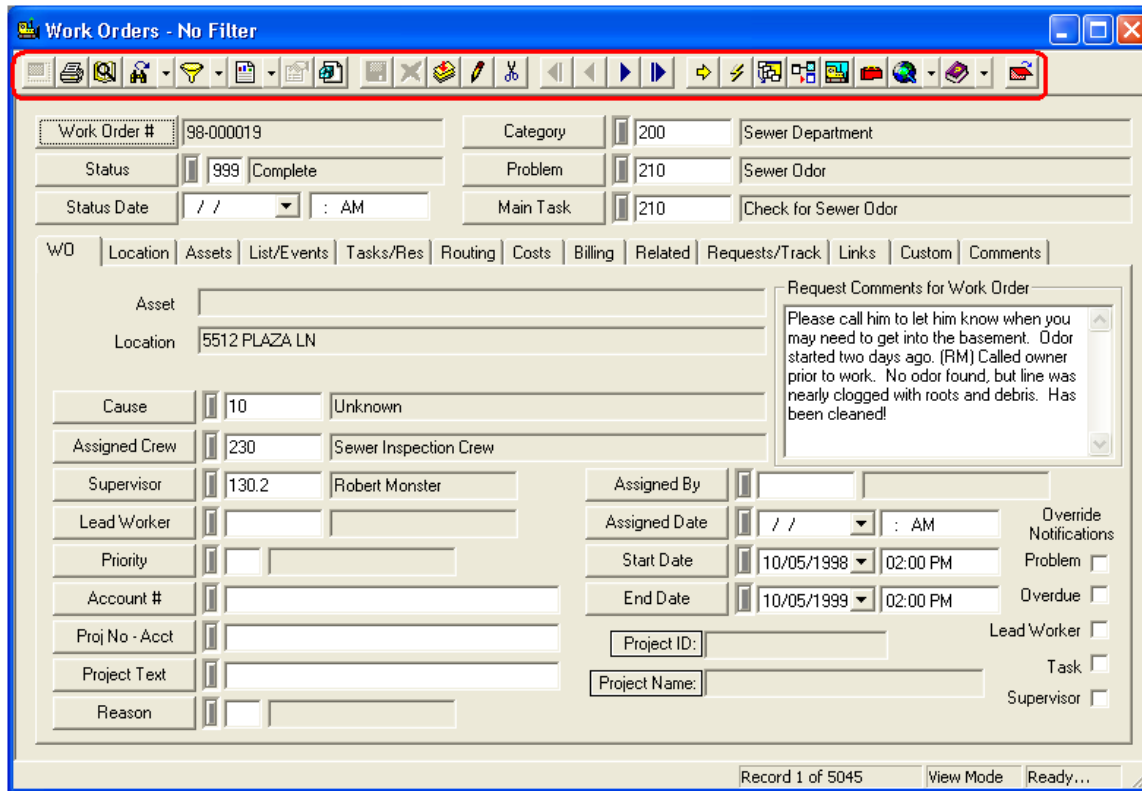
Form Layout

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

Notes: _____

Module Toolbar

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


























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






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



Notes: _____

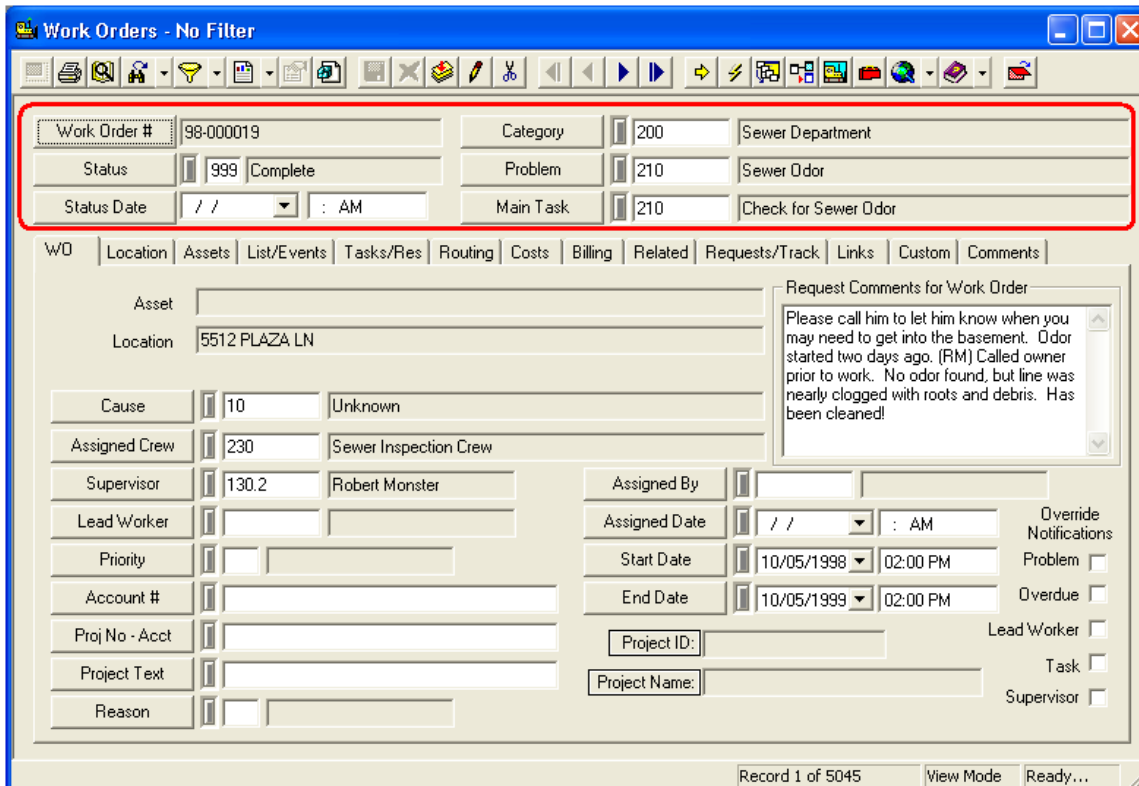
Toolbar Buttons

Button	Name	Description
	Resize	Resizes the module window.
	Print Module Window	Captures the screen image and sends it to your designated printer.
	Locate	Quickly locates specific records.
	Browse	Browse records, produce quick, custom reports, and export information.
	Filter	Opens the Filter window.
	Reports	View, print, or add and delete reports to or from the list of pre-defined reports.
	Open Document	View a list of documents, videos, and images attached to the record.
	Document Control	Add or delete documents, videos, and images to or from the record.
	Save	Save your changes.
	Cancel	Cancel any changes you have made since the last save.
	Add Record	Add a new record to the module.
	Edit	Edit the current record.
	Delete	Delete the current record.
	First, Previous, Next, Last	Navigate through the data set.
	Go To	View a specific record number.
	Refresh	Re-queries the data set and returns your screen to the first record in the filtered set (i.e. it runs the filter again).
	Relationship	Displays other modules related to the current record.
	Subsets	Create and save a set of filtered records.
	Work Order	Generates a work order for the current record.
	Work Request	Generates a work request for the current record.
	PM/Template	Generates a PM/Template for the current record.
	Toolkit	Opens the Toolkit dialog box. Toolkit options vary by module.
	Show In Map	Opens GIS, zooms in, and highlights the selected feature.

	Custom Library Function	Only appears in the Work Request module, and only works for those clients for which it was installed. Used in the "Search for Customer" process in Requests when accessing a third-party table containing the requestor or requestor address.
	Recalculate	Updates all calculations in the module.
	Help	Opens the Lucy Help Guide to the appropriate topic chapter.
	Falcon Integration	Only appears if the Falcon Document Management Integration is turned on, and only accessible if html strings are added to launch the Falcon document for each asset inventory module. Used to access documents via the web instead of individually associating documents with assets.
	Close	Closes the module.

Header Data

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



The screenshot shows the 'Work Orders - No Filter' window. The header data section, highlighted with a red box, includes the following fields:

- Work Order #: 98-000019
- Status: 999 Complete
- Category: 200 Sewer Department
- Problem: 210 Sewer Odor
- Status Date: / / : AM
- Main Task: 210 Check for Sewer Odor

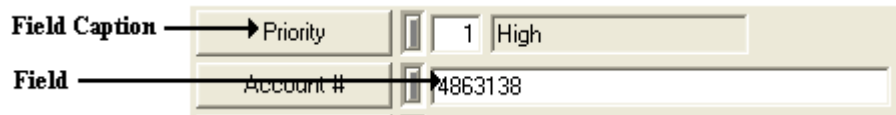
Below the header, the window displays various tabs (WO, Location, Assets, List/Events, Tasks/Res, Routing, Costs, Billing, Related, Requests/Track, Links, Custom, Comments) and a detailed form for the selected work order. The form includes fields for Asset, Location (5512 PLAZA LN), Cause (10 Unknown), Assigned Crew (230 Sewer Inspection Crew), Supervisor (130.2 Robert Monster), Assigned By, Assigned Date, Start Date (10/05/1998 02:00 PM), End Date (10/05/1999 02:00 PM), Project ID, and Project Name. A 'Request Comments for Work Order' text area contains the following text: "Please call him to let him know when you may need to get into the basement. Odor started two days ago. (RM) Called owner prior to work. No odor found, but line was nearly clogged with roots and debris. Has been cleaned!"

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

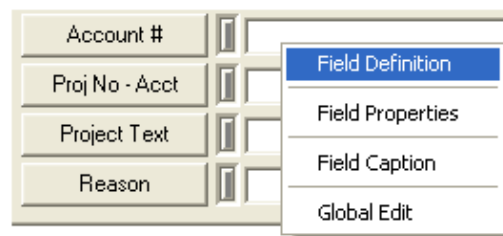
Fields and Field Captions

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

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



All fields have a field definition window and a field properties window. You can access these by placing your cursor over a field and using **Ctrl + Right Click** to view the menu options.





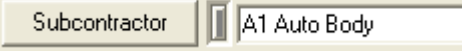
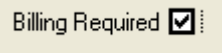
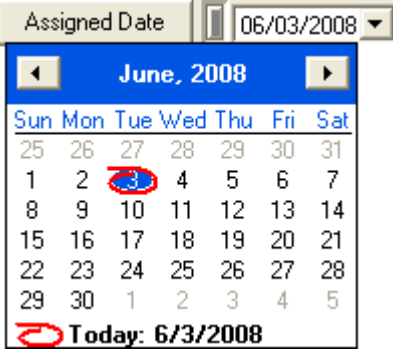
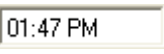
These windows allow you to view or change the field definition, change the decimal point in a numeric field, make field entry required or restricted, etc.

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

Notes: _____

Field Types

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

<p>Code-Description Fields</p> 	<p>These fields require you to enter a code in the first box. The code description will then appear in the grayed-out box. For example, a code might be 1=High, 2=Medium, 3=Low, etc. The number 1 would go in the first field and the description "High" would automatically appear in the second field. The codes and descriptions are created and then accessed through a pick list.</p>
<p>Numeric Fields</p> 	<p>Numeric fields only allow a number to be entered. Depending on the field, the numbers may or may not contain decimals.</p>
<p>Text Fields</p> 	<p>Text fields allow both letters and numbers to be entered.</p>
<p>Logical (checkbox) Fields</p> 	<p>Logical fields allow you to enter a checkmark in the box if you wish to select that field.</p>
<p>Date Fields</p> 	<p>Date fields can be manually or automatically entered. To manually enter a date, use the mm/dd/yyyy format. Use the arrow keys in place of the backslash. To automatically enter the current date, hit the space bar while your cursor is in the field. You can also use the drop-down menu to select the date from a pop-up calendar. You can then use the arrow keys at the top of the calendar to select a different month or year.</p>
<p>Time Fields</p> 	<p>Time fields can be manually or automatically entered. To manually enter a time, use the arrow keys in place of the colon. To automatically enter the current time, hit the space bar. To identify AM or PM, enter an "A" or "P" after the time or use the up or down arrow keys on your keyboard.</p>

Attribute Tabs

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

The screenshot shows the 'Work Orders - No Filter' application window. At the top, there is a title bar and a menu bar. Below the menu bar, there are several data entry fields for work order details:

- Work Order #: 98-000019
- Category: 200 Sewer Department
- Status: 999 Complete
- Problem: 210 Sewer Odor
- Status Date: / / : AM
- Main Task: 210 Check for Sewer Odor

A red box highlights the attribute tabs: WO, Location, Assets, List/Events, Tasks/Res, Routing, Costs, Billing, Related, Requests/Track, Links, Custom, and Comments. The 'WO' tab is currently selected.

Below the tabs, there are several data entry fields and a text area:

- Asset: [Empty]
- Location: 5512 PLAZA LN
- Cause: 10 Unknown
- Assigned Crew: 230 Sewer Inspection Crew
- Supervisor: 130.2 Robert Monster
- Assigned By: [Empty]
- Assigned Date: / / : AM
- Start Date: 10/05/1998 02:00 PM
- End Date: 10/05/1999 02:00 PM
- Project ID: [Empty]
- Project Name: [Empty]

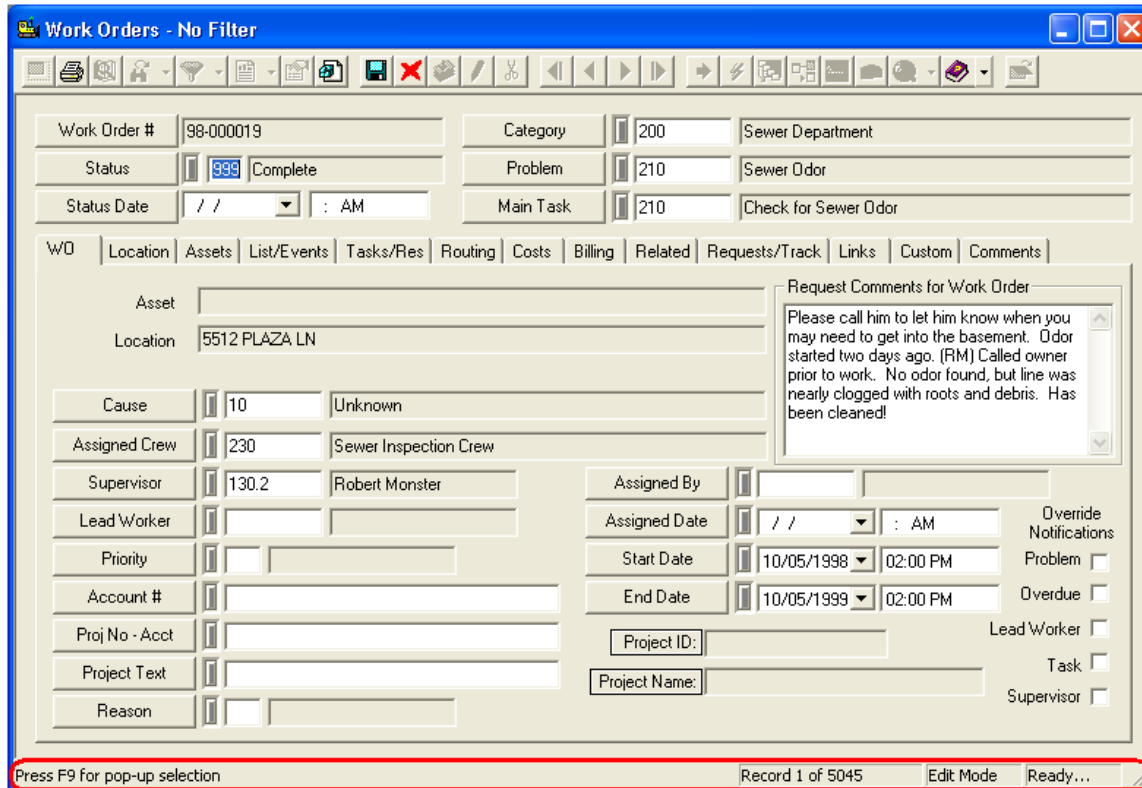
On the right side, there is a text area titled 'Request Comments for Work Order' containing the following text: 'Please call him to let him know when you may need to get into the basement. Odor started two days ago. (RM) Called owner prior to work. No odor found, but line was nearly clogged with roots and debris. Has been cleaned!'

At the bottom of the window, there is a status bar showing 'Record 1 of 5045', 'View Mode', and 'Ready...'.

Notes:

Status Bar

The status bar, located at the bottom of the module window, performs a variety of functions. It allows you to see what record number you are viewing as well as how many records are in the current set. For example, the status bar below reads "Record 1 of 5045".





The status bar also allows you to see whether the current record is in View Mode, Add Mode, or Edit Mode. For example, this record is in Edit Mode. The status bar may also display any messages regarding available Hot Keys or other special functions. The status bar above tells you that by pressing the <F9> hot key, a pop-up list of choices will appear. Finally, the status bar alerts you when the system is busy performing another function. In this example, the status bar reads "Ready", meaning the system is not performing any other function at this time.

Notes:




Adding, Editing, and Deleting Records

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


To Add a New Record:

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

To Edit the Current Record:

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

To Delete a Record:

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


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

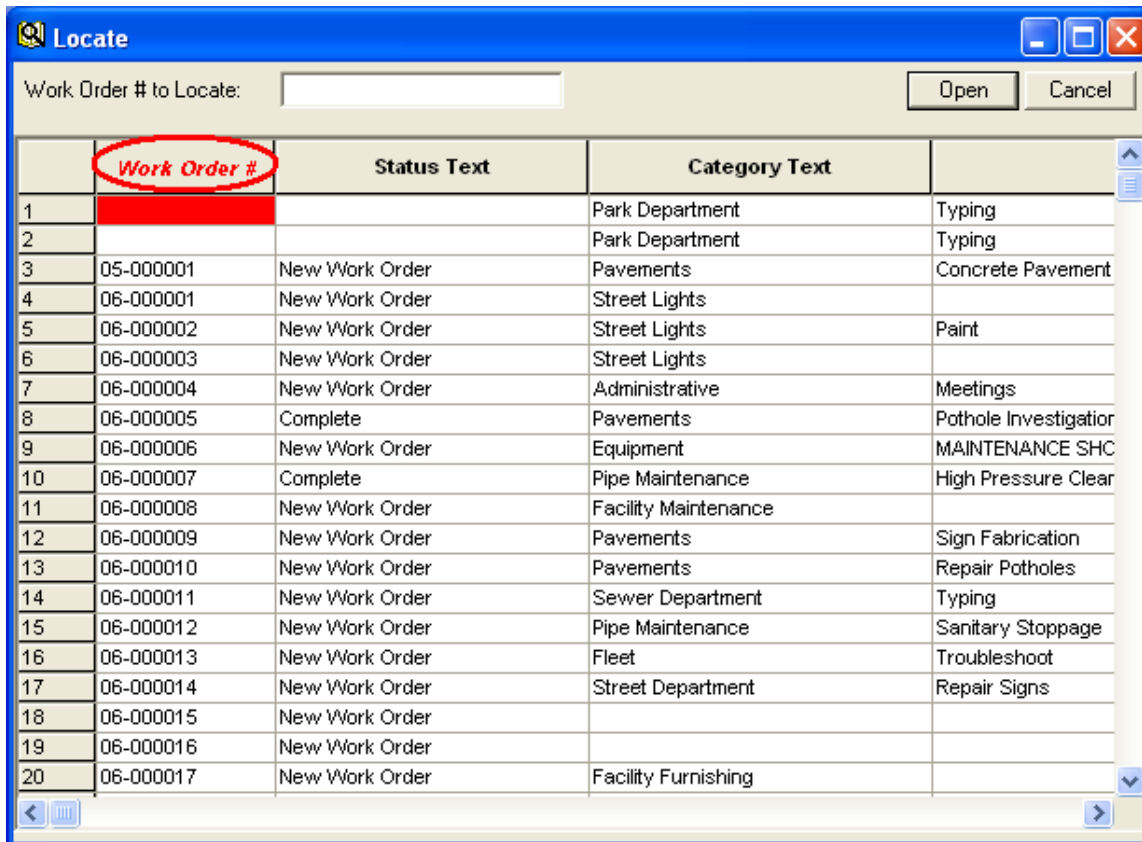
Notes: _____

Locate



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

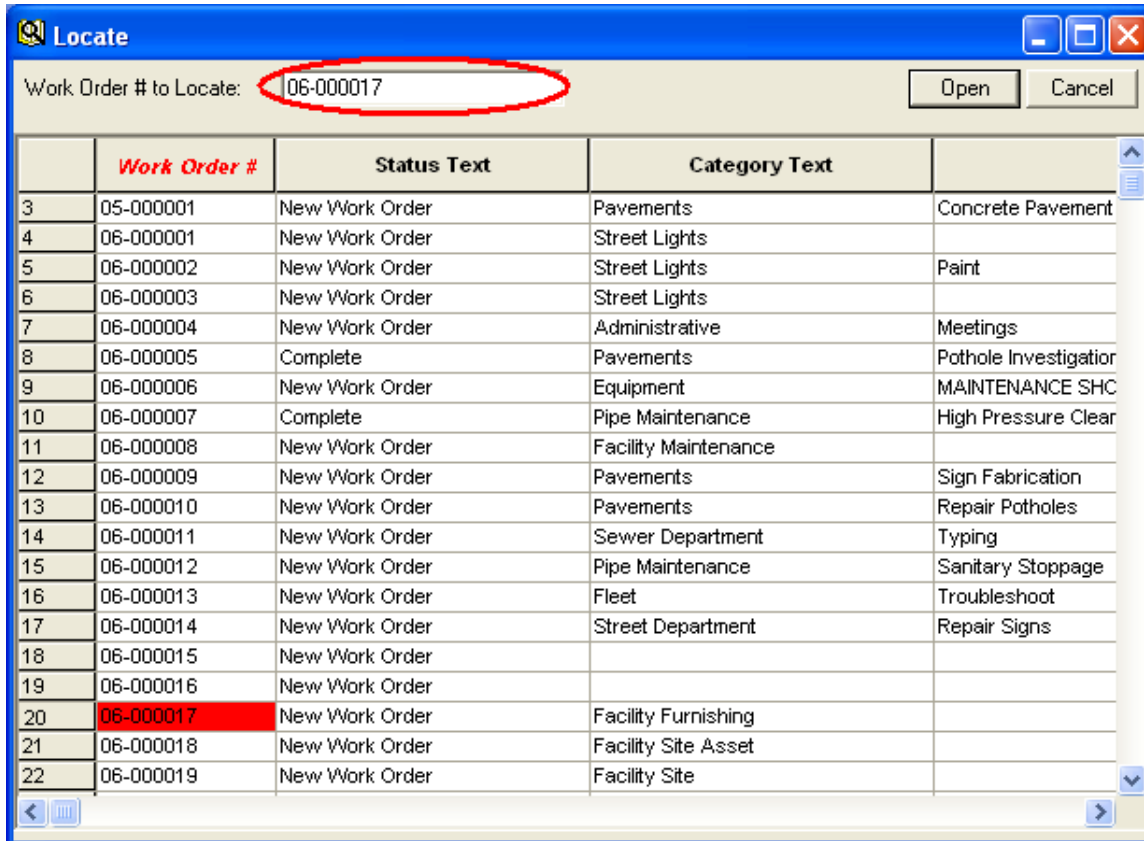
To access the locate feature, click  on the module toolbar.



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

Notes: _____

You can search for a record by scrolling through the list shown or by using a dynamic search. In a dynamic search you will use the text box at the top of the window to enter the information you are looking for. In this example, we've entered Work Order # 06-000017 and the system has found the corresponding record. The record found by the system will be highlighted in red.



The system will also search for partial text. In the example above, when "06" is typed, the red line will jump to the first record beginning with "06". As you continue typing, the highlighted line will move to match your search item. This function is performed automatically.

Once you have found the record you are searching for, click . The module will open to the highlighted record.

Notes: _____

Filtering Records




A filter helps you narrow your search for a specific record or set of records. You can use filters to find and work with only the records you want without having to deal with the entire record set. For instance, you may be trying to manage your Work Orders, but find that you have to sort through other people's records as well. A Filter will allow you to work with only your desired records.

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

There are two ways to open a filter:

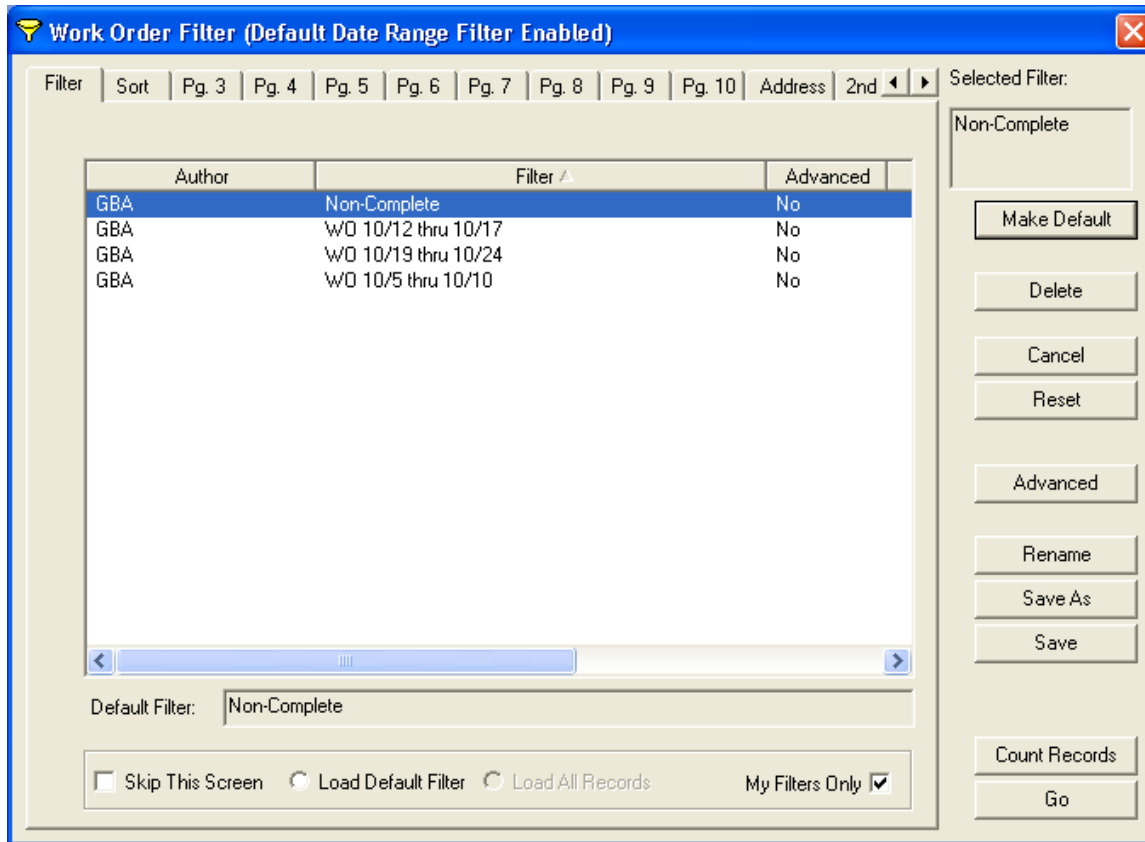
- When you open a module for the first time you will be prompted to define a filter before any records are displayed.

OR

- After a module is already opened, you can set up a filter by clicking the filter button in the toolbar .

Notes: _____

Using the Filter Window

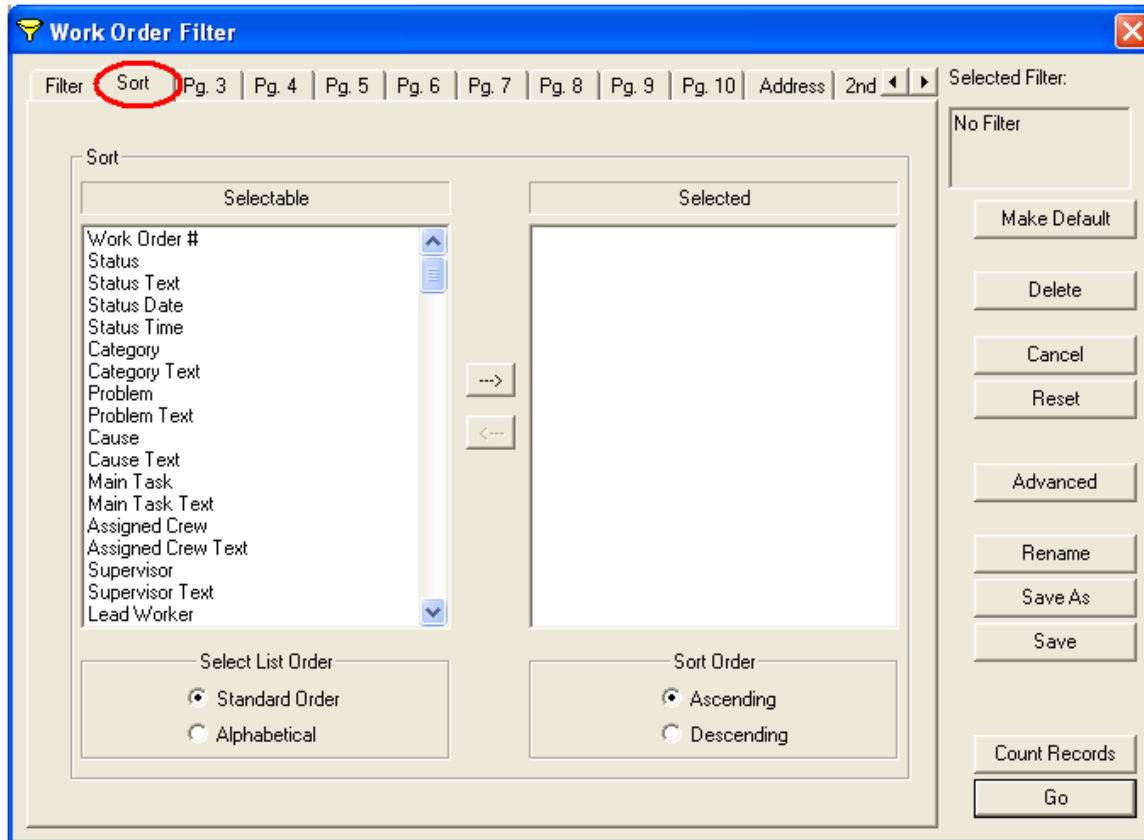


Filter



The “Filter” option is the first tab in the Filter window. This tab contains a list of saved filters. If this is your first time using the module, no filters will be saved.

Notes: _____

Sort



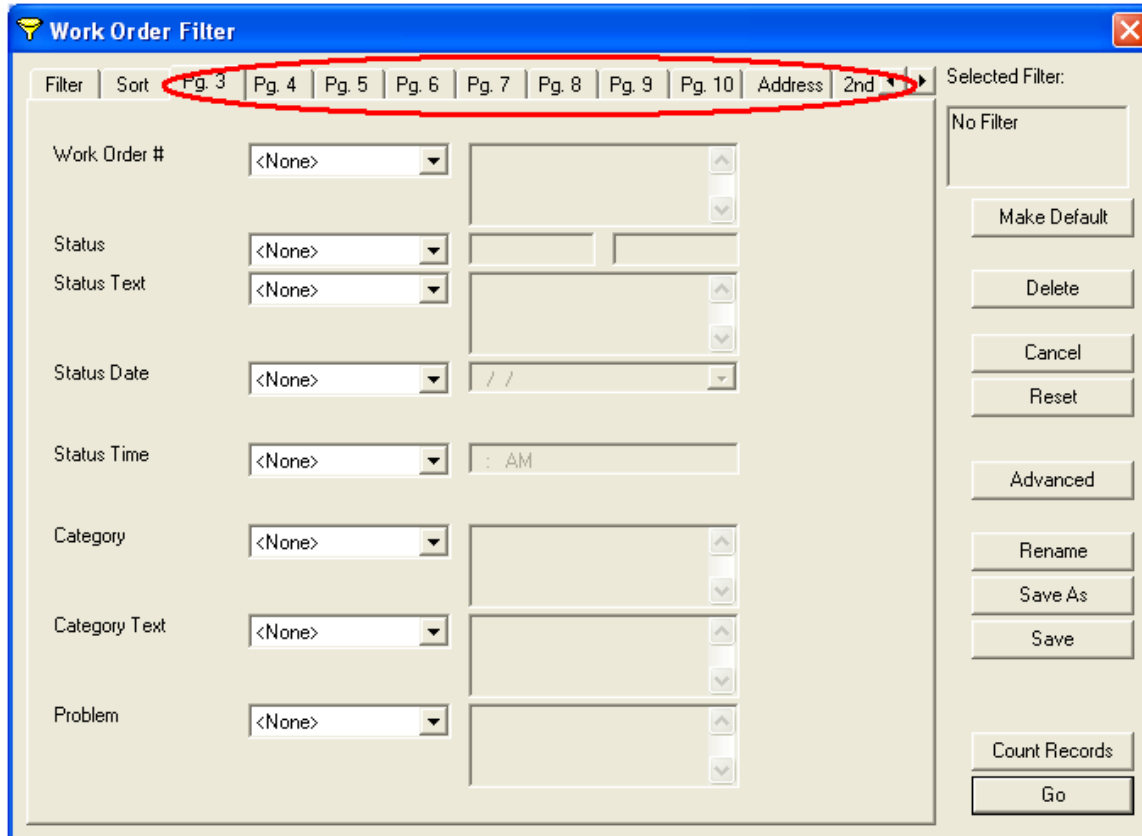
The “Sort” option is the second tab on the Filter window. THIS IS NOT A FILTER (and you can skip this step). You can set up a sort order to view records in ascending or descending order based on the field(s) you select. To use the sort function, complete the following steps:


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

Notes: _____

Filter Tabs

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



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

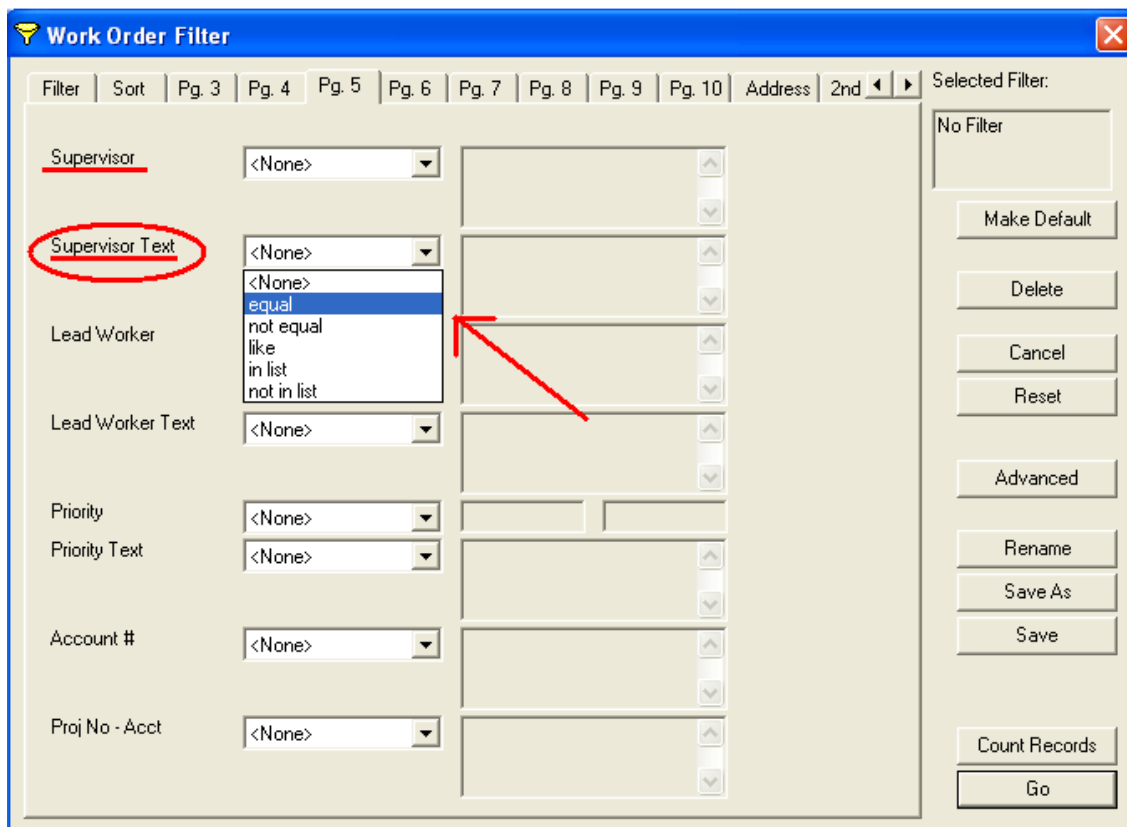
Notes: _____

Day-to-Day Work Order Filter

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

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

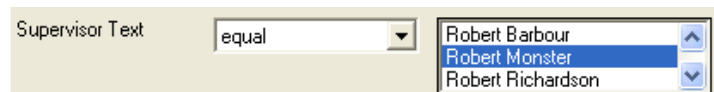
Filter with 'Equals' (Supervisor Name)



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

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

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



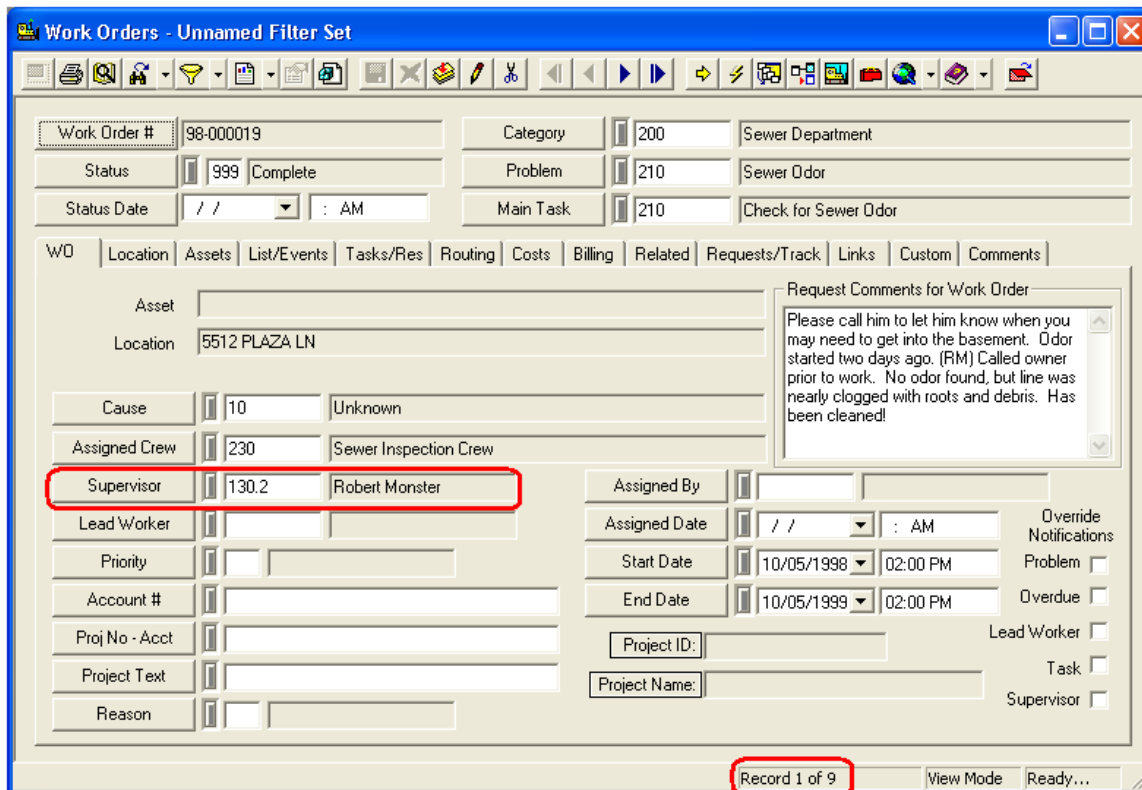
Count Records

Count Records Click the Count Records button to get a count on the records that will be filtered out. Here we can see that 9 (out of the total 5045) Work Order records have Robert Monster named as Supervisor.



Go to Records

Go Now click "Go" on the filter screen and the nine Work Orders with Robert Monster named as a supervisor will be shown. You can see the record count at the bottom of the screen (in the status bar).



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

Filter with 'In List' (Statuses)

Next, let's filter out the old Work Orders that are completed or cancelled, leaving only current work. You'll need to filter out all the Statuses indicating the Work Order is finished. Return to your filter form and find Status Text on Pg. 3. Instead of 'equal', which allows it to be equal to



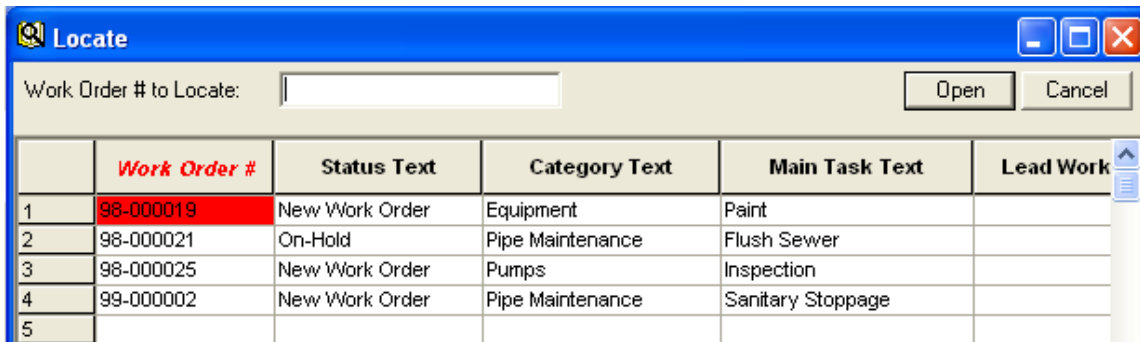
only one value, select 'in list', which allows you to choose several matching values.

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

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

- ✓ Missing Required Data
- ✓ New Work Order
- ✓ Open WO ... etc..."

Click 'Count Records' again, and we're down to four Work Orders—all current. Click 'Go' to open the records, and 'Locate' to see a list.



The screenshot shows a window titled "Locate" with a search field and "Open" and "Cancel" buttons. Below is a table with the following data:

	<i>Work Order #</i>	<i>Status Text</i>	<i>Category Text</i>	<i>Main Task Text</i>	<i>Lead Work</i>
1	98-000019	New Work Order	Equipment	Paint	
2	98-000021	On-Hold	Pipe Maintenance	Flush Sewer	
3	98-000025	New Work Order	Pumps	Inspection	
4	99-000002	New Work Order	Pipe Maintenance	Sanitary Stoppage	
5					

Save the Filter

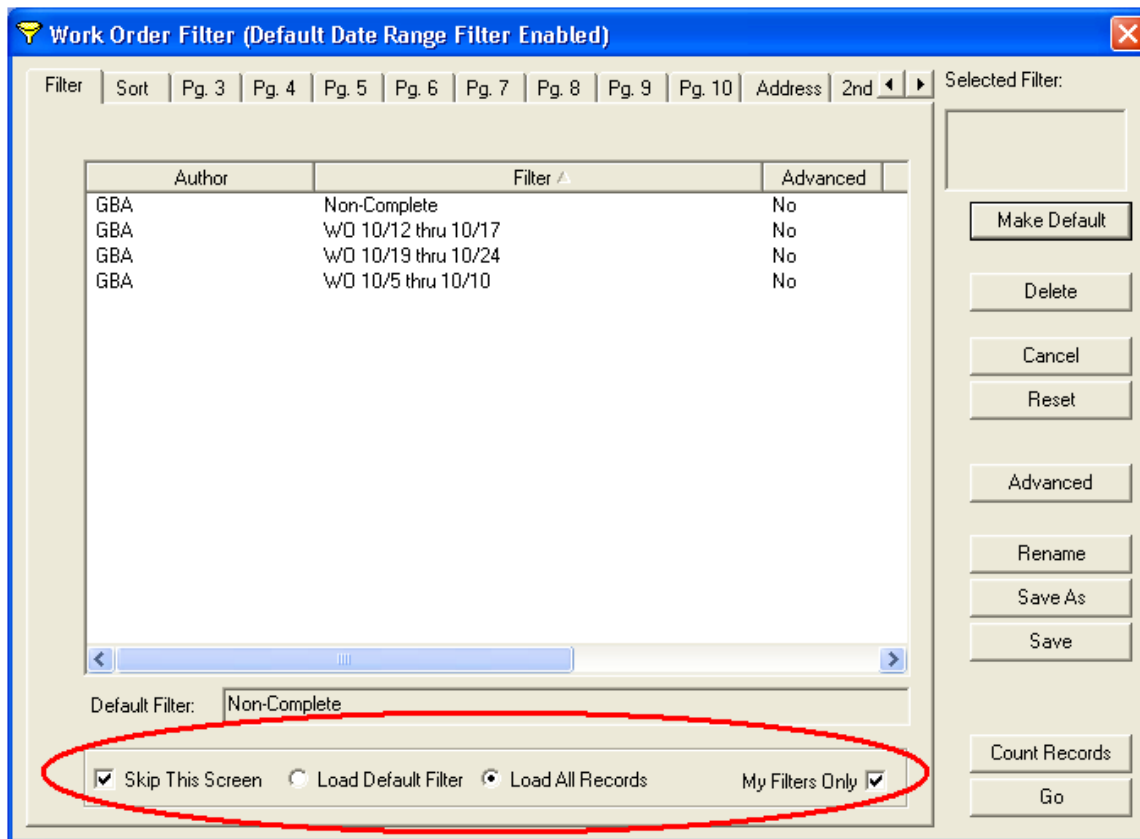
This is a useful daily filter, so we can save it and make it the default filter. Then, it will filter Work Orders every time we open the Work Order module.

Notes: _____

Using a Default Filter

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

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



Notes: _____

Advanced Filters

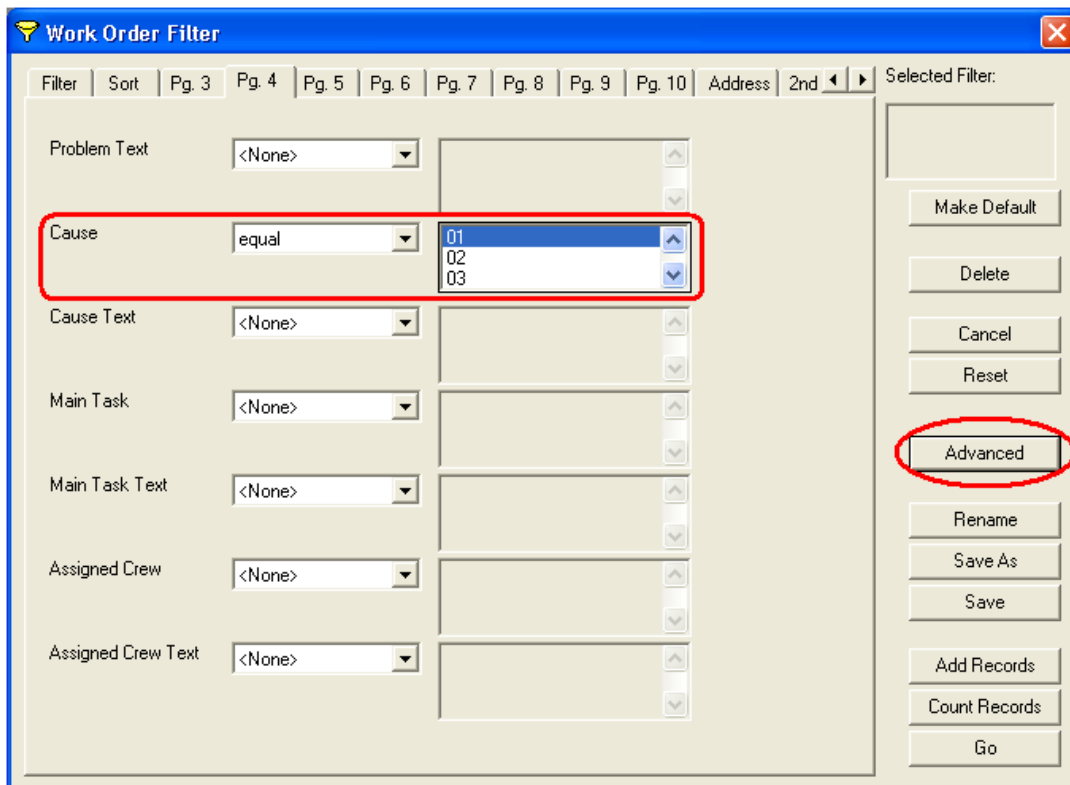
If you find that one of our standard filters does not provide the necessary results, you can use an advanced filter. Advanced filters are particularly useful if you want to query for null values or include 'or' statements in your query. In the following step-by-step examples, we'll show you how to create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

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

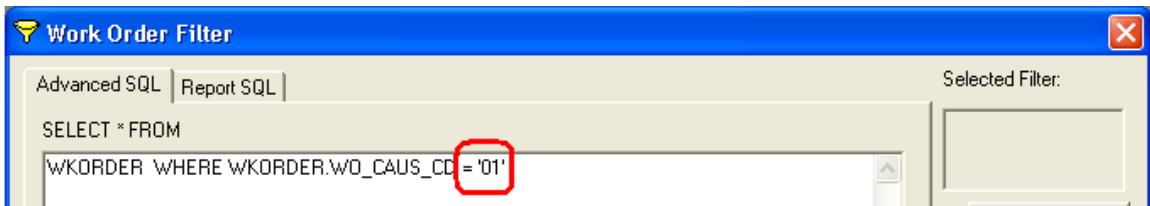
Filtering for Null Values

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

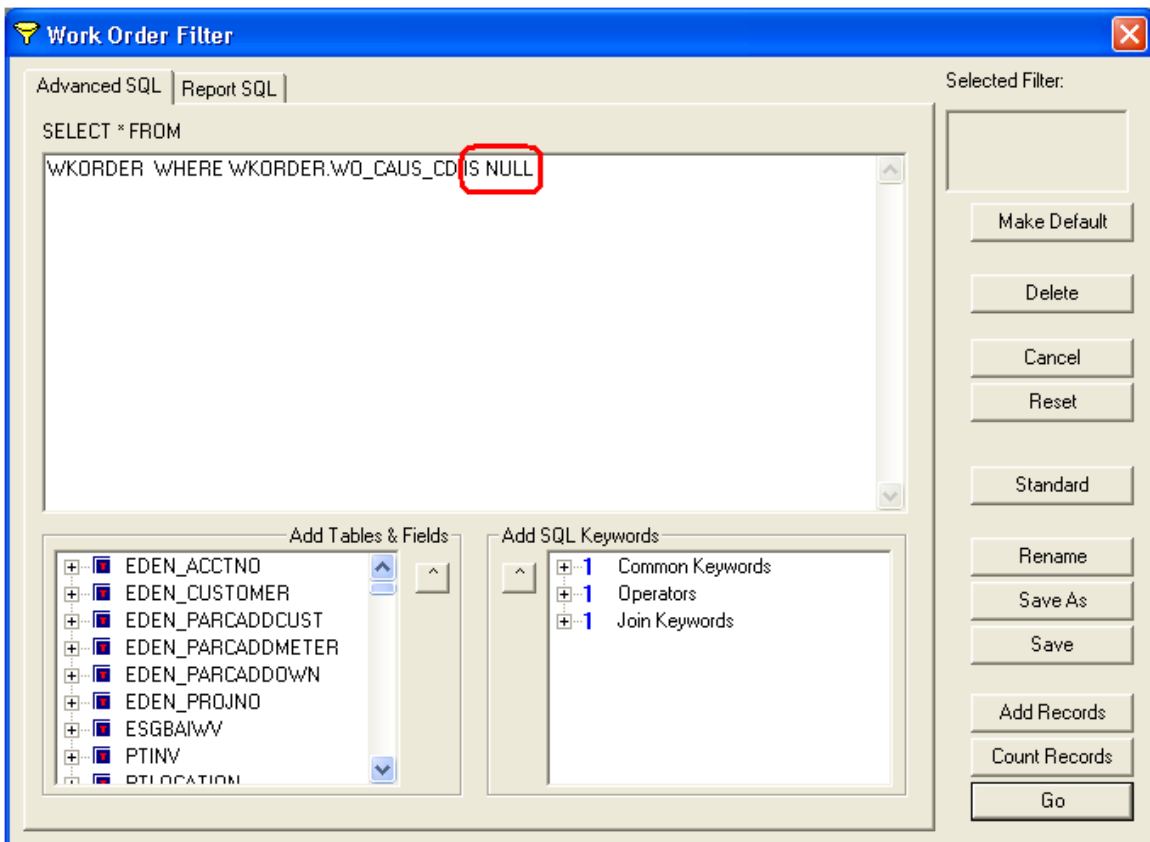
1. First, select a field to filter on. We'll use the Cause field in Work Orders.
2. Select 'equal' from the drop-down list. Then, highlight any value in the next field. It doesn't matter which one you select as we'll be deleting it in the next step.
3. Click the Advanced button.



- In the Advanced SQL window, delete the = sign and anything after it. Here, we'll delete the = sign and '01'.



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



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Filtering Using 'OR' Statements

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

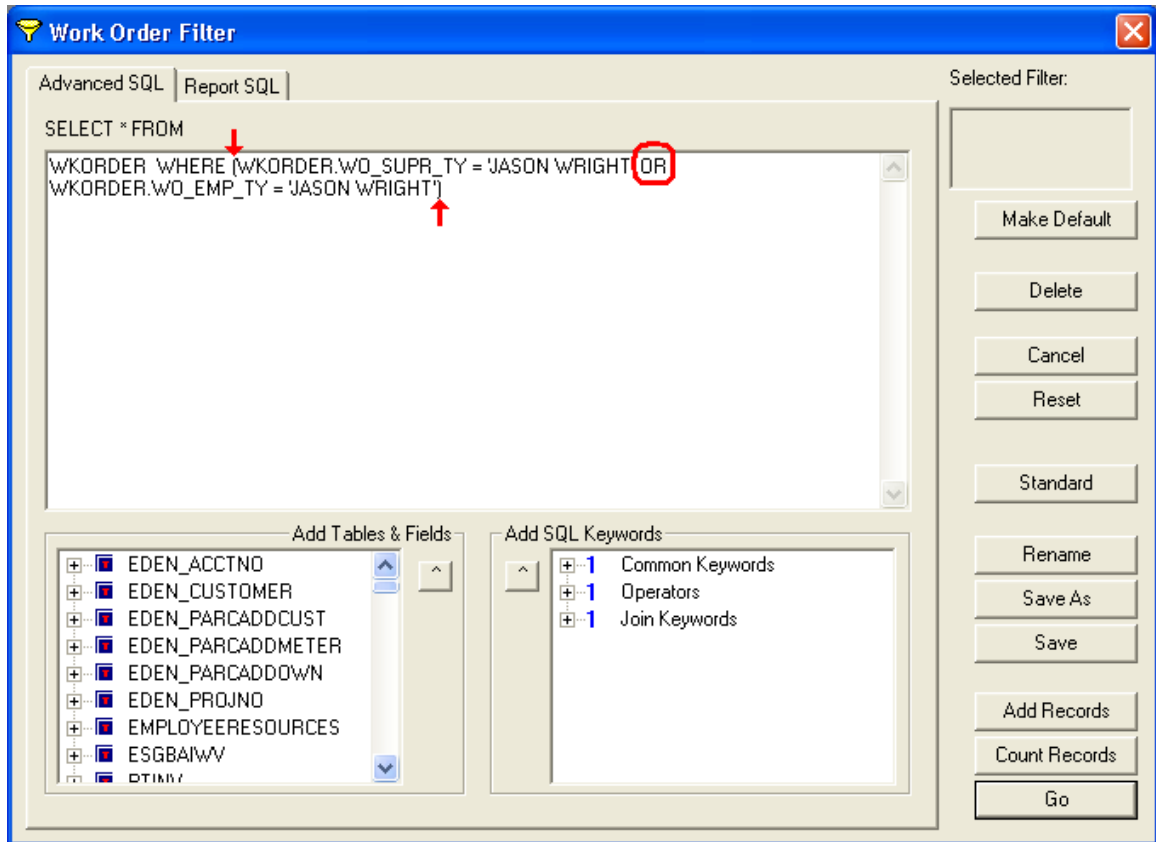
1. On Pg. 5 of the filter screen, set the Supervisor Text and Lead Worker Text equal to your name. Here, we've selected Jason Wright.
2. As the filter appears now, it will return all records where both the supervisor AND lead worker is Jason Wright. Since we want to return records where he is listed in either capacity (not both), we'll use an advanced filter. Click the *Advanced* button.

The screenshot shows the 'Work Order Filter' dialog box, page 5. The 'Supervisor Text' and 'Lead Worker Text' fields are highlighted with red boxes. The 'Supervisor Text' dropdown is set to 'equal' and the list shows 'JASON TITLESON', 'JASON WRIGHT', and 'JEFF FOSTER'. The 'Lead Worker Text' dropdown is also set to 'equal' and the list shows 'JASON PEPPER', 'JASON TITLESON', and 'JASON WRIGHT'. The 'Advanced' button on the right side is circled in red.

The screenshot shows the 'Work Order Filter' dialog box, Advanced SQL tab. The SQL query is: `SELECT * FROM WKORDER WHERE WKORDER.WO_SUPP_TY = 'JASON WRIGHT' AND WKORDER.WO_EMP_TY = 'JASON WRIGHT'`. The word 'AND' is circled in red.

3. On the Advanced SQL tab, delete the word **AND** and type **OR** in its place.
4. Add parentheses around the new query: `WKORDER WHERE (WKORDER.WO_SUPP_TYP = 'JASON WRIGHT' OR WKORDER.WO_EMP_TY = 'JASON WRIGHT')`

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



Filters for 'In List' Numbers

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

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

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3. Press *GO* to view the filtered set. In this example, our filter will return the three work orders numbered 2007-01712, 2007-01711, and 2007-01710.


The screenshot shows a 'Work Order Filter' dialog box. The 'Work Order #' field is highlighted with a red box and contains a list of three work order numbers: 2007-01712, 2007-01711, and 2007-01710. Other fields include Status, Status Text, Status Date, Status Time, Category, Category Text, and Problem, all set to '<None>'. The dialog has a toolbar at the top with 'Filter', 'Sort', and page navigation buttons. A 'Selected Filter:' field is on the right, and a 'Go' button is at the bottom right.

Reports

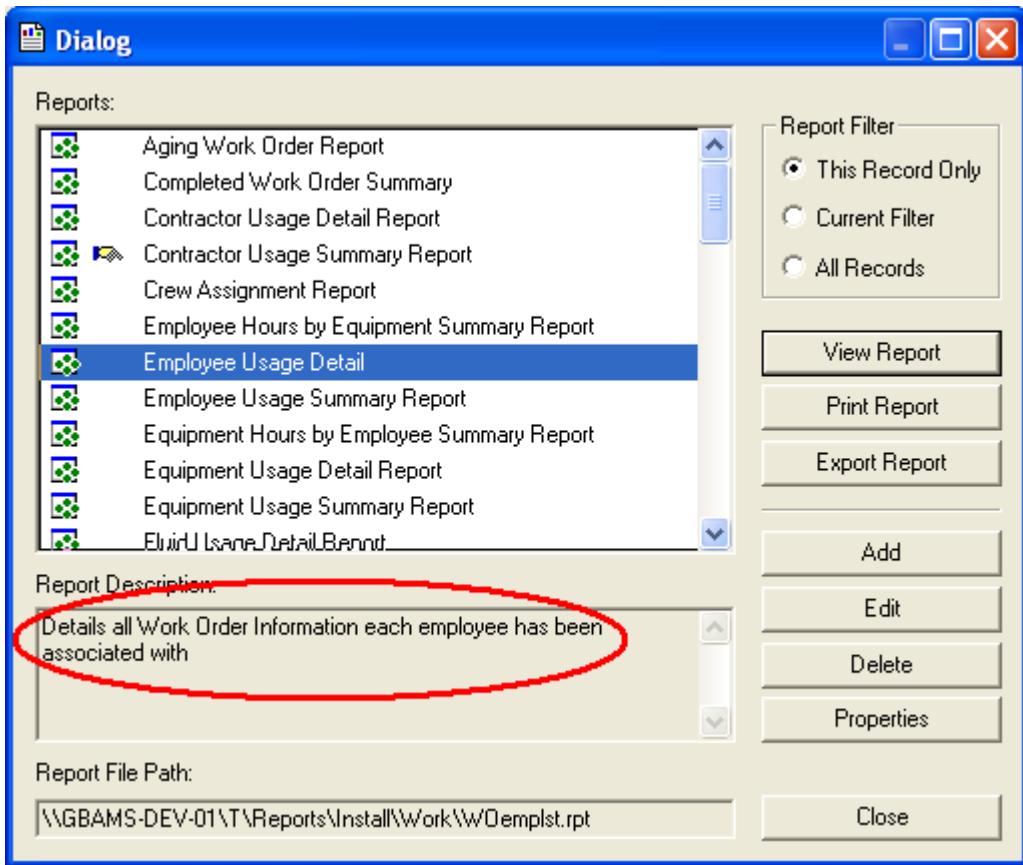


Reports are a convenient way to view and organize data. The desktop application contains a set of pre-defined reports in each module. These reports can be modified using Crystal Reports™ software. You can also create your own custom reports using Crystal Reports. The following example is from the *Work*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

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

1. To access the report, click  on the module toolbar.
2. The names of all pre-defined reports are listed in the Reports dialog box. Scroll down to find the report you are looking for.

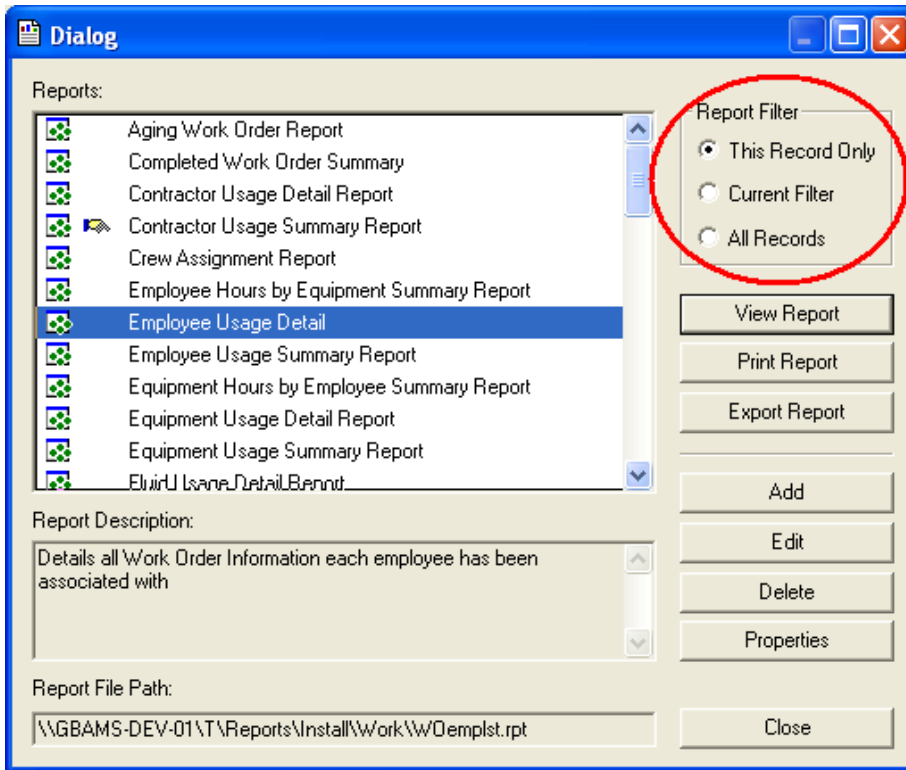
- The Report Description box at the bottom of the screen will display a brief summary of the highlighted report.



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Report Filter

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




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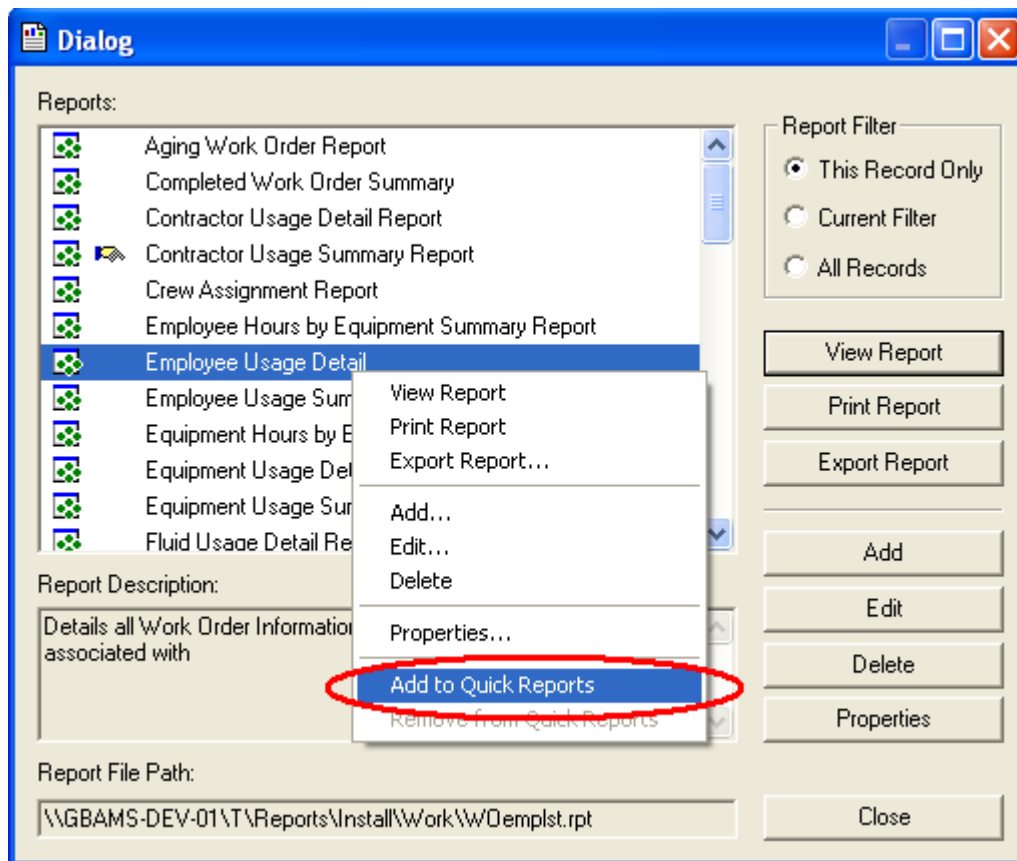
- If you select "This Record Only", the report will only include the information on the current record.
- If you select "Current Filter", the report will include all records in the current filtered set.
- If you select "All Records", the report will include all records in the module.


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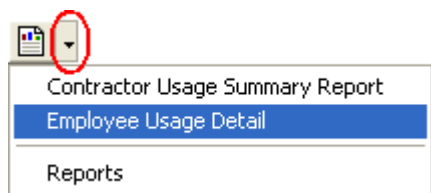
Quick Reports

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

1. Click  on the module toolbar to open the report list.
2. Right click on the report you wish to save as a “Quick Report” (default report).
3. Select Add to Quick Reports.





4. Once a report is saved as a Quick Report, a pointing hand  will appear in front of the report name. Quick Reports will appear in the list when you click the drop-down arrow beside the toolbar button.

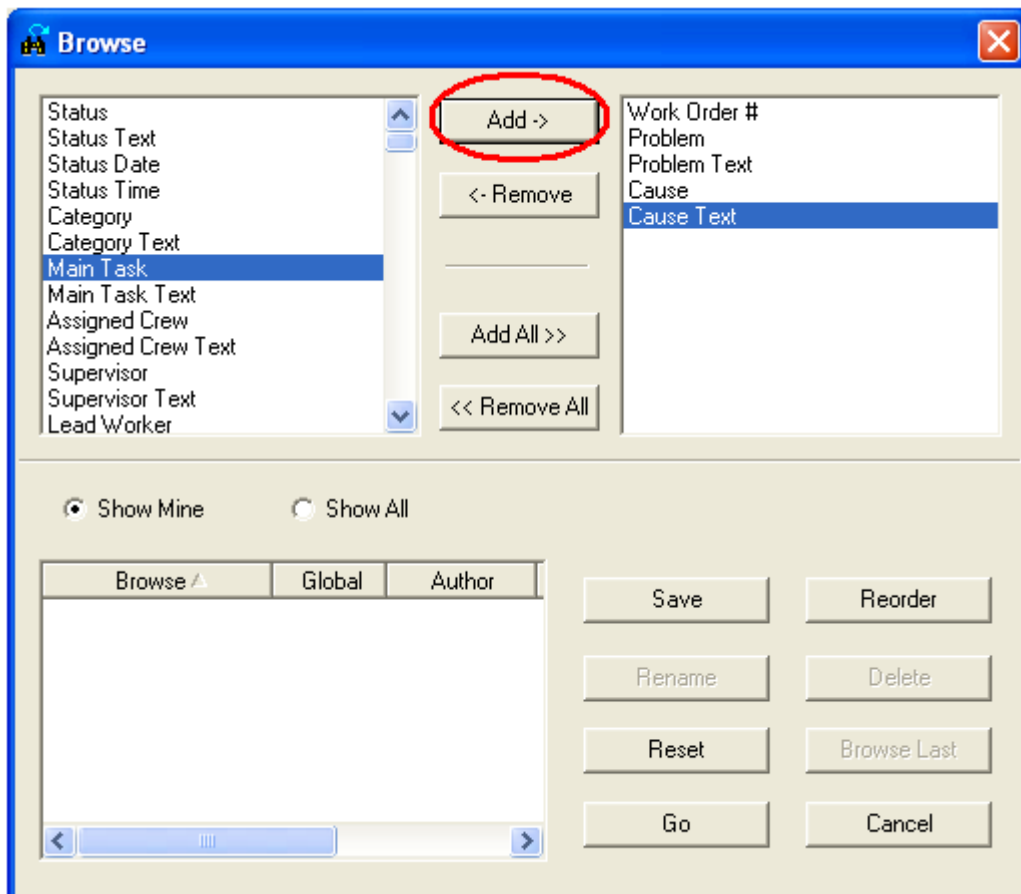


Browse

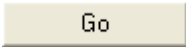


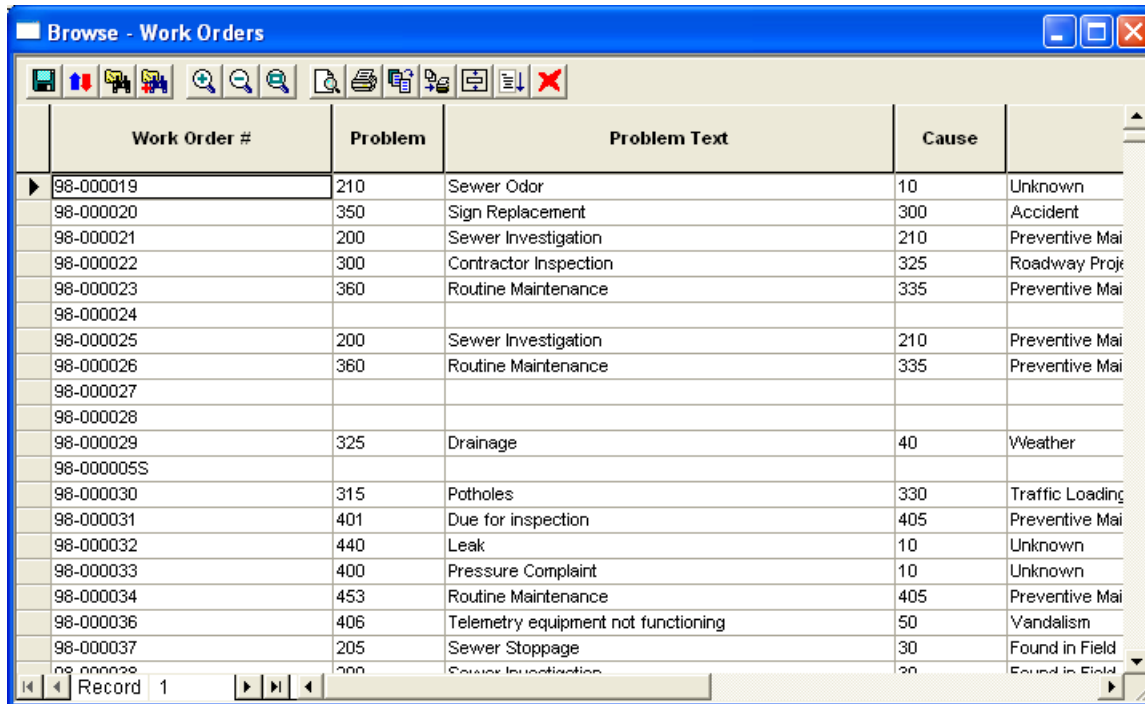
The Browse feature is used for reporting on-demand. It allows you to quickly generate a report in table format. The following example is from the *Work Orders* module; however, these same steps apply in all other modules.

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



Browse Report

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

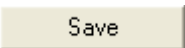


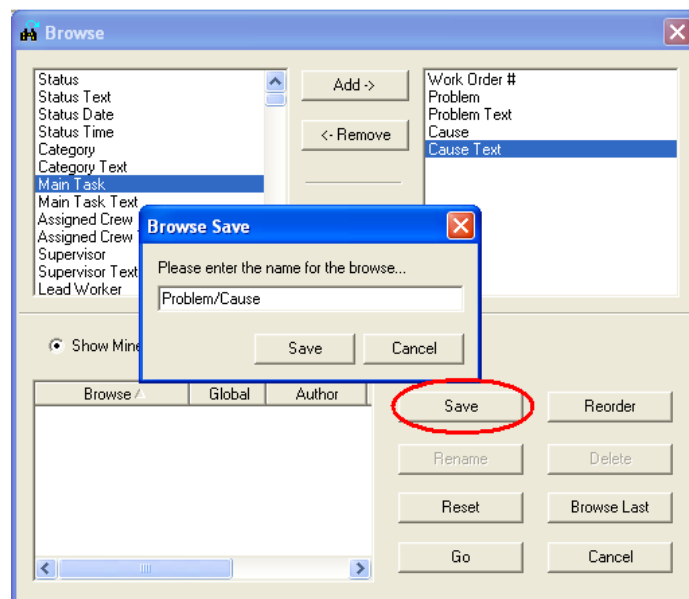
Work Order #	Problem	Problem Text	Cause	
98-000019	210	Sewer Odor	10	Unknown
98-000020	350	Sign Replacement	300	Accident
98-000021	200	Sewer Investigation	210	Preventive Mai
98-000022	300	Contractor Inspection	325	Roadway Proj
98-000023	360	Routine Maintenance	335	Preventive Mai
98-000024				
98-000025	200	Sewer Investigation	210	Preventive Mai
98-000026	360	Routine Maintenance	335	Preventive Mai
98-000027				
98-000028				
98-000029	325	Drainage	40	Weather
98-000055				
98-000030	315	Potholes	330	Traffic Loading
98-000031	401	Due for inspection	405	Preventive Mai
98-000032	440	Leak	10	Unknown
98-000033	400	Pressure Complaint	10	Unknown
98-000034	453	Routine Maintenance	405	Preventive Mai
98-000036	406	Telemetry equipment not functioning	50	Vandalism
98-000037	205	Sewer Stoppage	30	Found in Field
98-000038	200	Sewer Investigation	210	Found in Field

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

Saving a Browse

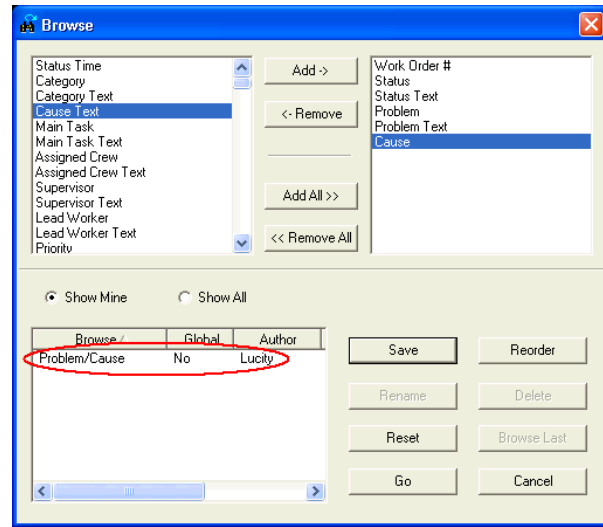
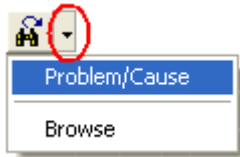
If this is a Browse report you would like to use frequently, you can save it to your Browse list.

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



Quick Browse

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



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