TRAINING GUIDE

Web Apps – Dashboard Setup Training

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In this booklet, we'll introduce you to the Dashboard. We'll provide you with detailed instructions on creating customized Dashboard homepages, setting up users, and implementing Dashboard Templates. Several easy-to-follow exercises are included in this workbook to give you practice setting up custom Dashboard pages.

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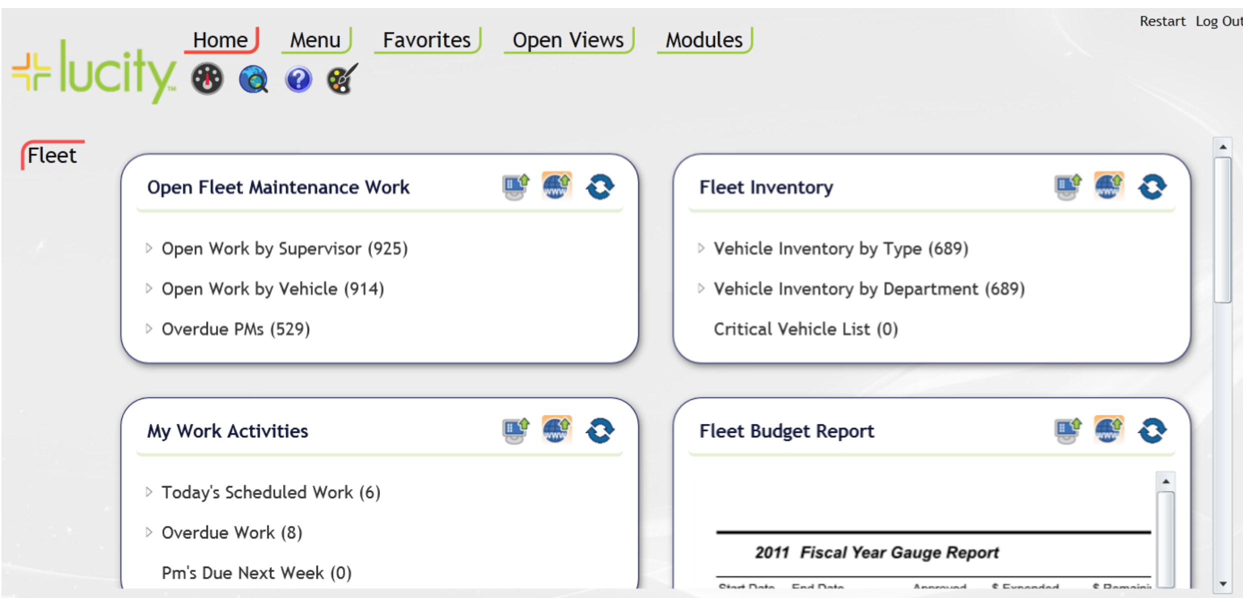
Understanding the Dashboard

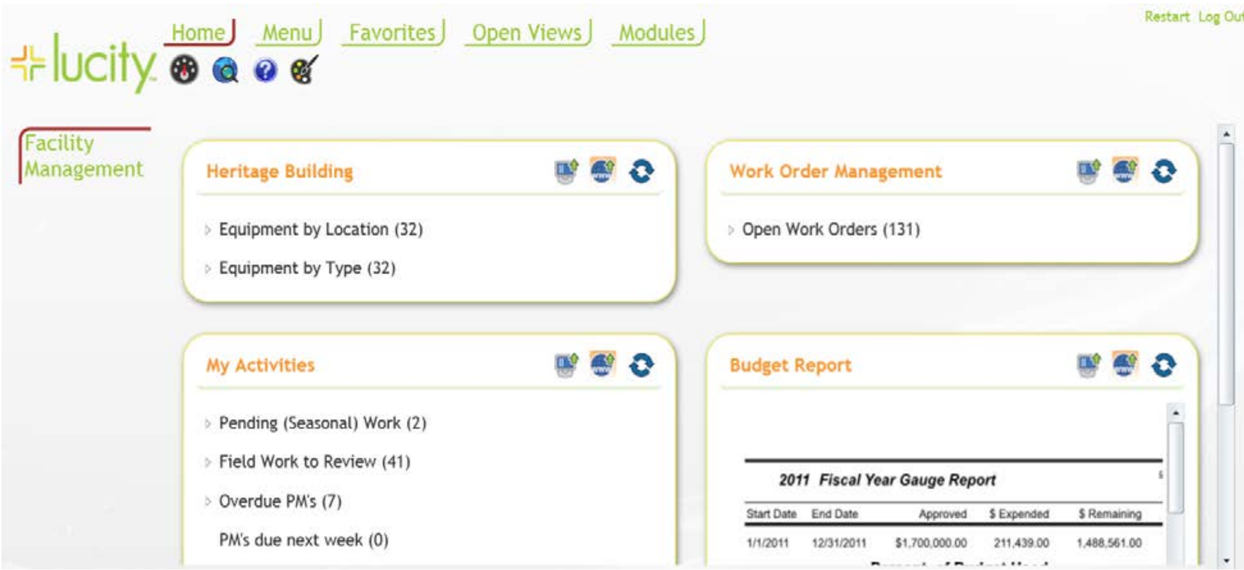
The main intent of the Dashboard is to put all sorts of information quickly in front of each user. This information can be customized so that each user only sees the data that is most important to him or her.

The Dashboard contains customized dashboard Tabs, data drills, reports, asset hierarchy trees, and RSS feeds that have been set up to show each user's items of interest. Within these dashboards users are able to set up quick links to programs in the *Lucity*™ suite in both the Web and Desktop applications. This allows the web application to act as a portal to critical *Lucity* modules. Users will have immediate access via the web to the modules that they use on a frequent basis. It contains the customized menus and forms used to add, edit, and view records in the desktop. We recommend that each user set up a shortcut to the correct website to launch the Dashboard quickly and easily.

In the Lucity Administration tool the Dashboard/Preferences tool is an easy-to-use way to customize the look and content of your fully dynamic Dashboard page. The Dashboard/Preferences allows you to create Dashboard settings for individual users as well as create Templates that can be applied to multiple users.

Some examples of Dashboards:





As can be seen with the examples above, the information and the appearance of the dashboards are very customizable.

Before we begin the process of how to set up the system, let’s start with some basic terminology.

The menu at the top is the top menu bar.

Home - always displays the special dashboard buttons underneath it.

Menu – this displays a customized menu created for the user by the administrator

Favorites – this displays a list of Tabs that the user has marked as favorites

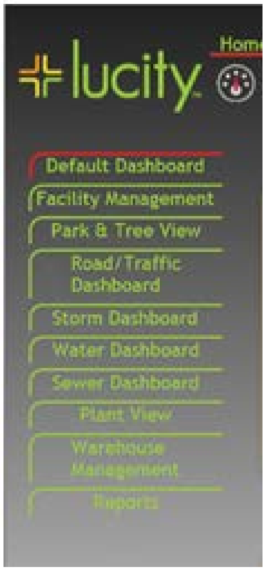
Open Views – this provides a list of all views that are open

Modules – this provides a list of all views that the user has permissions to use.

The special dashboard buttons do the following:

	**Open Dashboard** – This button will always put all open views in the background and bring the dashboard forward.
	**Links** – This shows web links that the user can launch. When setting up these links always use the entire web address (http://www.lucity.com). This button is not visible unless the user has links assigned to his or her dashboard.
	**Launch GIS Map**. This button launches the GIS map that is setup for the user.
	**Help** – This button launches the on-line help file.
	**Local Preferences** – this button allows the user to make font and color changes to their personal dashboard. The user has to have the Change Default Application Colors permission set to true in order to change colors but can always change font sizes.
	**Timesheet** – This button displays the timesheet (or timesheets) that the administrator has authorized for this user. If the user has rights, then the user may also see some timesheet administrator functions.

Dashboard Tabs



Each of the items to the left are called Dashboard tabs. By clicking on each tab, a different dashboard page appears (think of it as flipping a page). Each time a new Tab is accessed, the system needs to refresh the data set. This can take some time depending on how much data is being accessed.

We recommend that no one dashboard is so full of information that it takes a long time to pull up. Only data from the current dashboard Tab is analyzed at one time and it always starts with the Dashboard Tab at the top. Keep it clean and the reports that it pulls up simple.

A user can have an unlimited number of Dashboard Tabs per dashboard.

Administrators can also setup Shared Tabs. Information on these tabs is modified once and then is updated on all dashboards that use the shared tab.

Dashboard Frames

The box to the left shows an example of a Dashboard Frame. These frames show information that has been gleaned from the Lucity data. To the left shows data drill information (the user can drill down into the data to see how it is structured). Frames can also show Reports, Asset Hierarchy Trees, and RSS feeds. The Web map is also shown as a Plugin type but this is not yet functional

Each dashboard can have an unlimited number of dashboard frames and an unlimited number of plugins but we again recommend keeping each dashboard Tab as clean and fast as possible.

Notes:____

Dashboard Frame Items contain the following elements:

A **Dashboard Frame Title** (Open Work Orders above)

Launch in Desktop button – If this button has the orange square surrounding it, then when the data drill text is selected, the Lucity desktop application will be launched and the number of records in the data drill will be retrieved.

Launch in Web button – If this button has the orange square surrounding it then when the data drill text is selected, the Lucity web application will be launched for this data type and the number of records in the data drill will be retrieved.

Once either of the two buttons above have been selected by the user then the system remembers its setting until the other button is selected. Currently there is no way to turn off these buttons. For Version 7.4 SP1 we are developing a process where the administrator can hide either or both of these buttons.

Refresh button – refreshes the information contained within the dashboard frame. This is typically much faster than having the entire frame refreshed. We would recommend that users hit this refresh button whenever they want to see updated information in their frame.

Plug-ins. There are four unique types of plug-ins that each frame can display. While a frame can mix and match plugin types, we recommend that each frame only contain one plugin type. The plugin types are:

> *Note: As an administrator, you can easily copy a plugin that has been configured for another user to the current user's frame.*

Data Drill – A data drill displays raw data from a filter in a drill down fashion. The filter can be all records or a very special record set. It can also contain key or reserve words which further help limit the data that is displayed.

Asset Hierarchy Trees – An asset tree displays facility assets in the following hierarchical order: Sites, Buildings, Roof, Floor, Room, Door, and Furnishings. Associated Equipment assets will appear at each level in the hierarchy. You can expand the individual asset categories to see lists of the specific assets included. Module record counts will also be indicated. Users can click on the asset names to launch the associated asset records in the desktop application.

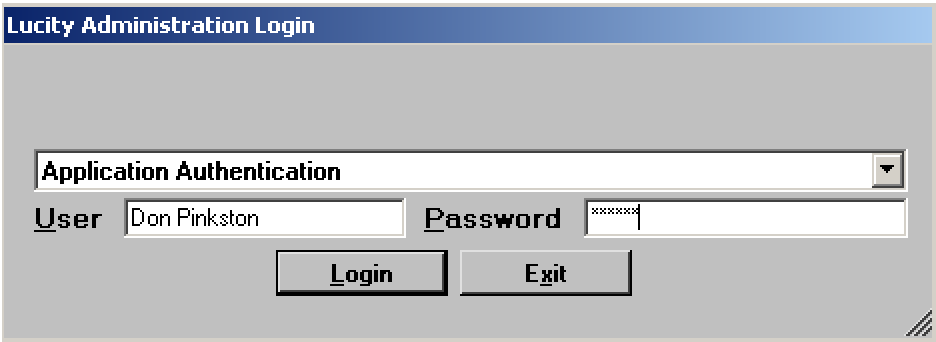
Reports – Users can view Crystal Reports in the frame. We recommend that these reports are formatted in such a way that fit inside the frame (or close to it).

RSS Feeds - RSS is a family of web feed formats used to publish frequently updated content such as news stories, blog entries, and podcasts in a standardized manner. An RSS document (called a "feed") contains either a summary of content from an associated web site or the full text. **Important!** While Lucity attempts to remove any scripting from RSS feeds before rendering them on the Dashboard, we cannot guarantee that external feeds are safe. When you or one of your users subscribes to a feed, they do so at their own risk.

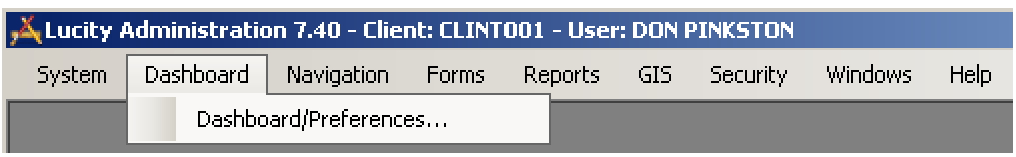
Now that we have some of the nomenclature out of the way, we can start learning how to create these dashboard pages.

Creating Custom Dashboard Pages

To begin creating custom Dashboard pages, you'll need to login to the Lucity Administrative User Interface. This program is found with the Lucity Admin Tools and can be accessed using your Lucity username and password.



Access the Dashboard/Preferences by selecting **Dashboard>>Dashboard Preferences** from the UI Admin main menu:



The Dashboard/Preferences will open. Over the following pages we'll walk you through a step-by-step example to add a new user's Dashboard page.

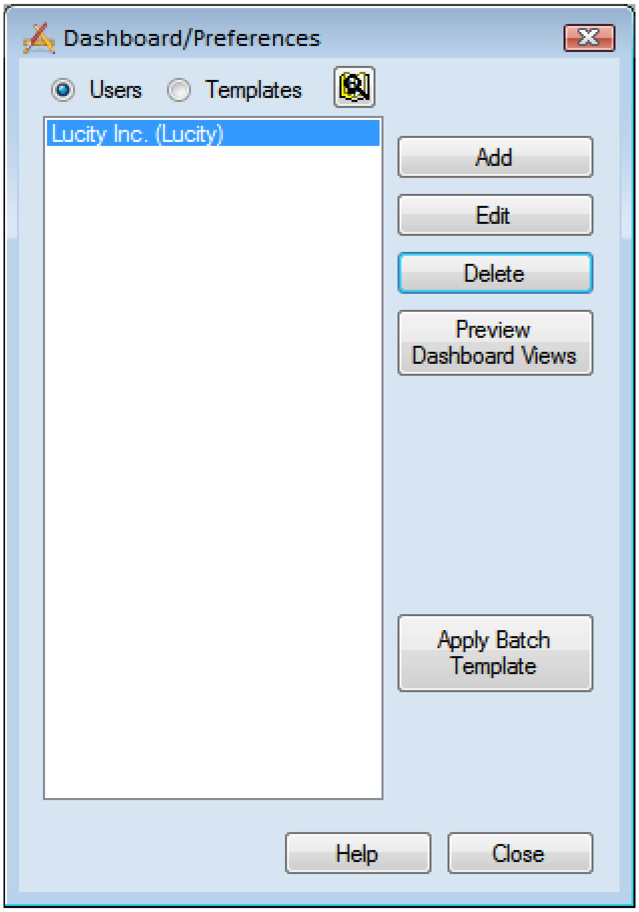
Notes:____

Example 1

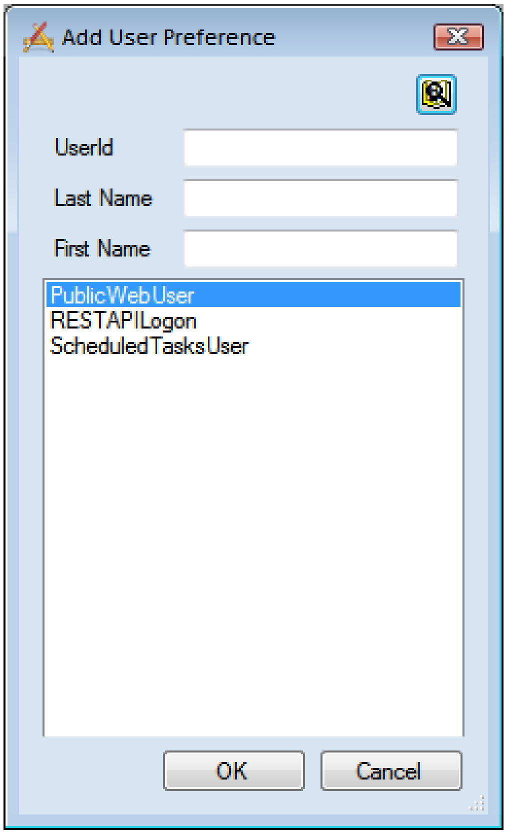
For our first example, we'll create a Dashboard page for Nick Roland, a Lead Worker. The first step in setting up a Dashboard page is to add users; afterwards you can edit or delete users.

Add User

1. Select the *Users* radio button at the top of the Dashboard/Preferences. All users with previously defined Dashboard settings will be displayed.



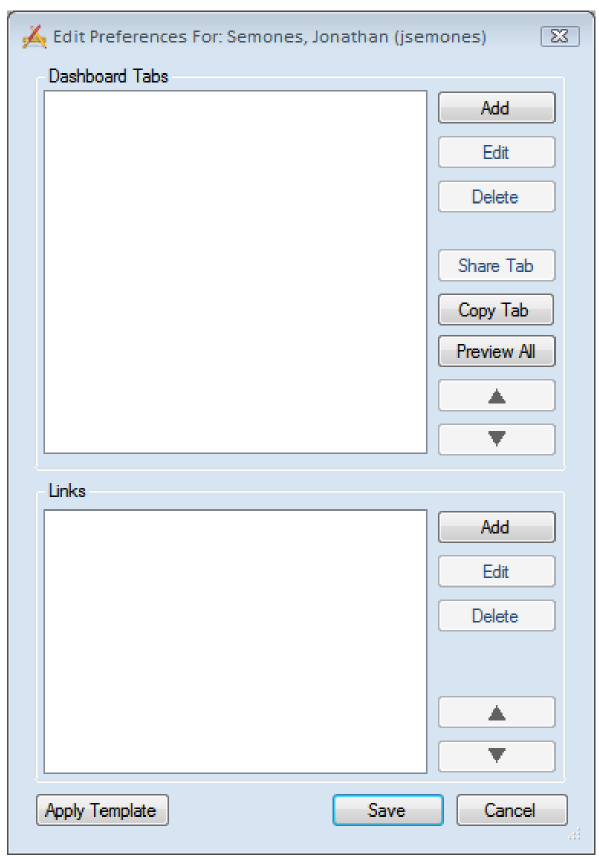
2. Click the *Add* button in the upper right-hand corner. The Add User Preference dialog will appear, allowing you to select the user for whom you plan to create a dashboard.



3. Make sure that you understand how the Find button  works. If you have a long list, it gives you an opportunity to restrict the list to view a much smaller list.

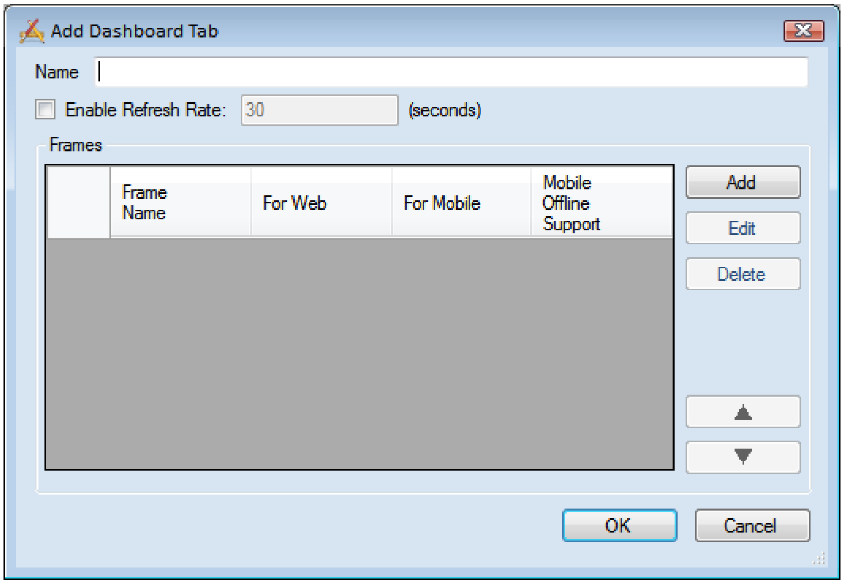
   By typing in a letter in either the UserID, Last Name or First Name fields, the user list at the bottom automatically get reduced to those users meeting the criteria typed. For instance, if J was typed in the First Name field below, two users would then remain – Jen Rollon and Jimmy Washington.

Under Dashboard Tabs, select *Add*. This will allow you to create a dashboard and add frames to the dashboard.



Add a Dashboard View

To add a Dashboard Tab, click the *Add* button on the Add Dashboard Tab dialog. The following window will appear:



1. In the Name field, enter a unique name for the Dashboard Tab. Each User can have multiple Tabs.
2. The Enable Refresh Rate (in Seconds) field allows you to enter a regular interval to automatically refresh the Dashboard. This refreshes all of the filters and reports on schedule. To enter a Refresh Rate, mark the Enable checkbox and type a value (in seconds) in the field provided.

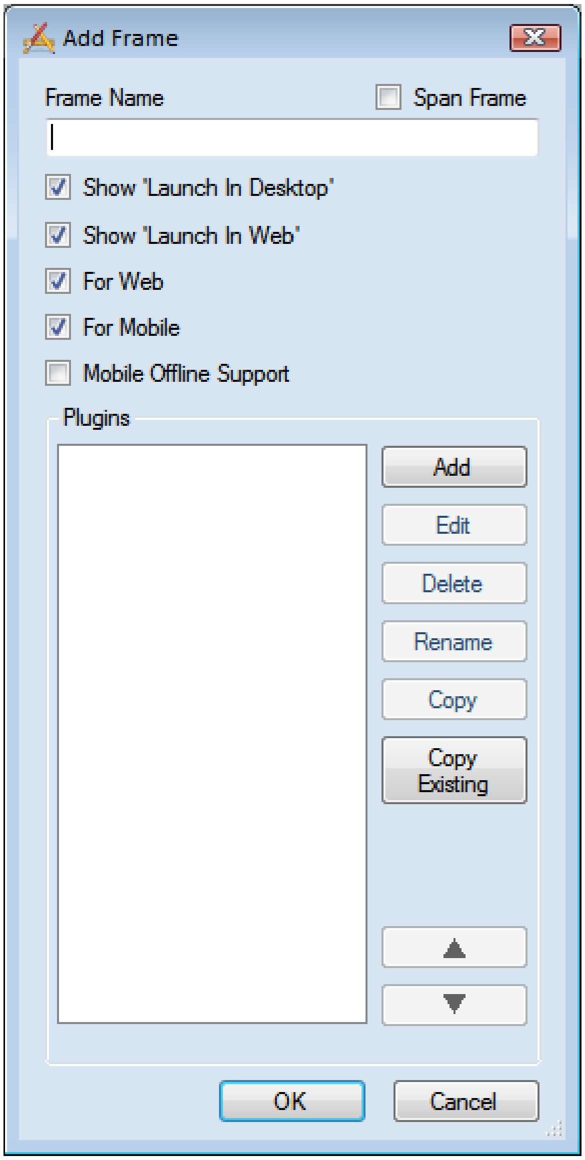
> *Note: By default, the system does not automatically refresh the data; instead, the user can manually refresh the system by pressing the Refresh link inside each Dashboard Frame. This is the recommended method for doing a system refresh*

3. Click *OK* to save your changes.

Add Frame

1. Re-open the Dashboard Tab you created by clicking Edit
   - Every user can have multiple frames on the Dashboard page. A frame is simply a box containing specified groups of information. Frames can contain data drills, reports, asset hierarchy trees, and RSS feeds.
   - You can use the buttons alongside the grid to Edit and Delete frames, as well as change the order in which they appear on screen by using the Move Up and Move Down buttons.

2. Click the *Add* button beside the Frame grid. The Frame dialog will appear.

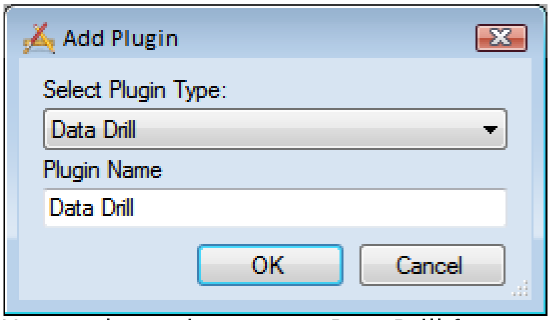


3. In the Frame Name field, type "Nick Roland's Open Work Orders".
    - Frame names are required. They appear in the frame headers on the Dashboard page and help users quickly identify the data stored in the frame.
    - Typically Frames are paired together so that they are two across. If you want the frame to take up the width of two standard frames, then select the Span Frame checkbox. This will make the frame twice as wide.
    - For Version 7.4, SP1, we plan on adding two more checkboxes by the Span Frame. One for Launch in Desktop and one for Launch in Web. This will allow clients to be able to prevent users from launching a non-desired method.

Add Data drill

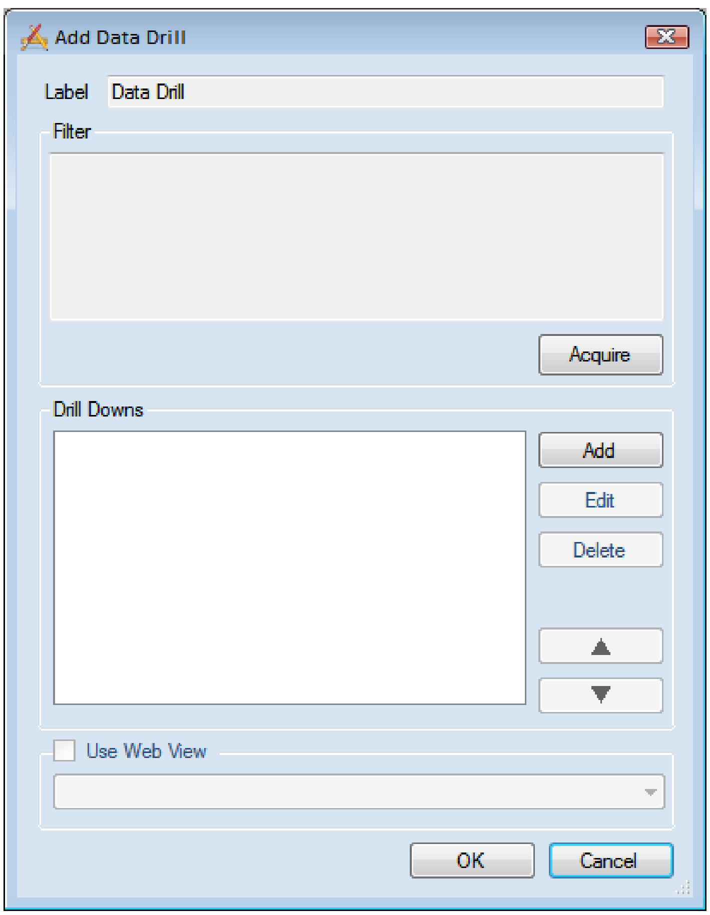
A data drill displays raw data from a filter in the form of a tree view. Each filter provides access to one or more *Lucity* modules. This allows the Dashboard to be either Work Order based or Service Request based, as well as Asset based.

1. Click the *Add* button in the Add Frame dialog. The following dialog will appear:

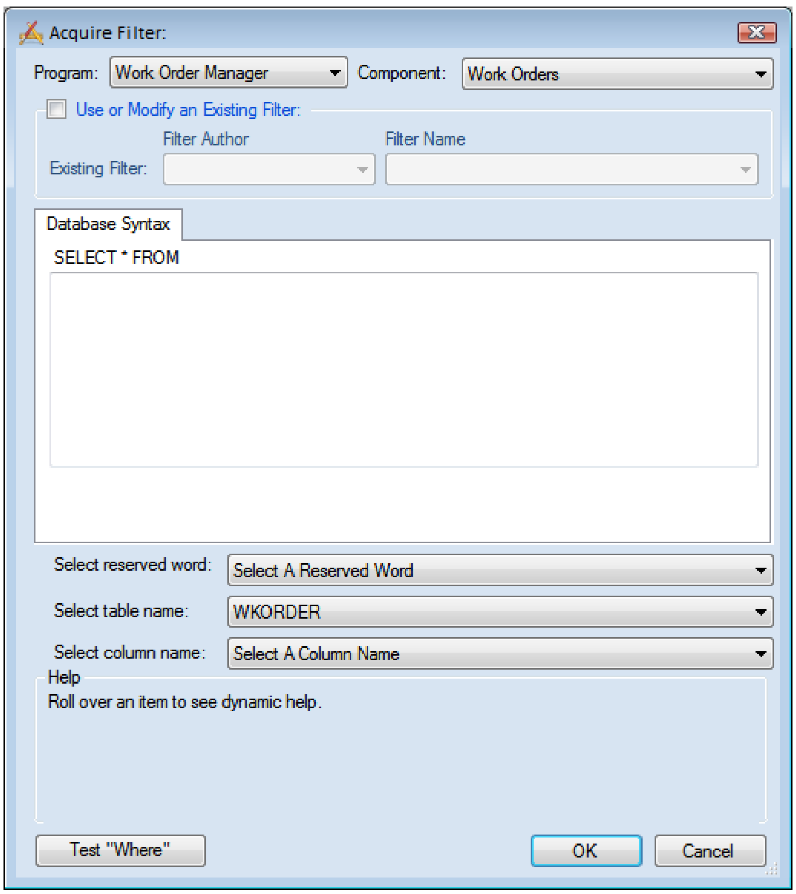


You can leave the name as Data Drill for now as we will change it later.

2. From the drop down menu, choose plugin type you will be creating: data drill, asset hierarchy tree, crystal report, map, or RSS feed. Give the plugin a name. Click OK and the following dialog will appear for that plugin type. For this example, we will create a data drill.

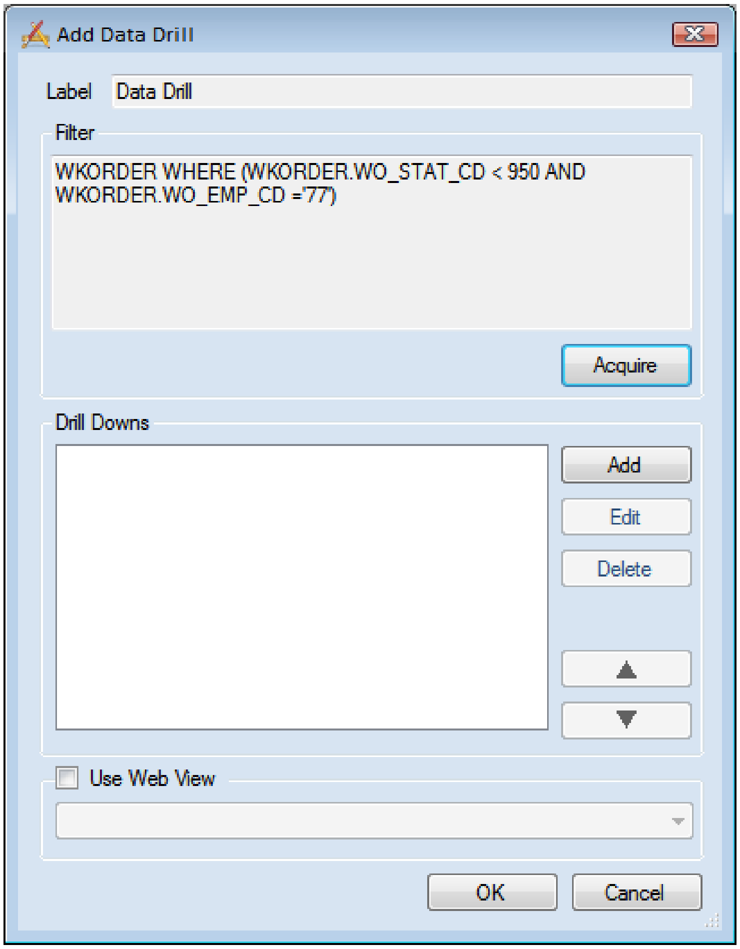


3. Filters define the content of the root data displayed in the data drill. Click the *Acquire* button to access the Acquire Filter dialog:
4. Select the Work Order Manager from the *Program* dropdown list and Work Orders from the *Module* dropdown list.
5. Place a checkmark beside “Use or Modify an Existing Filter”.
6. Select “Nick Roland” as the Filter Author.
    - Most users will want to select their own login name as the Filter Author. The Filter Name dropdown will then display only the filters created using that login.
7. Select “Nick Roland Open Work Orders” from the Filter Name list. The SQL statement for this filter will be populated into the large text field.
    - Note that you can edit the information in this text field if you wish. Any changes made here will not impact the original filter inside the desktop application.
8. Click the Test “Where” button to confirm the filter. It will show how many records are returned when the filter is processed and indicate if any errors are detected.

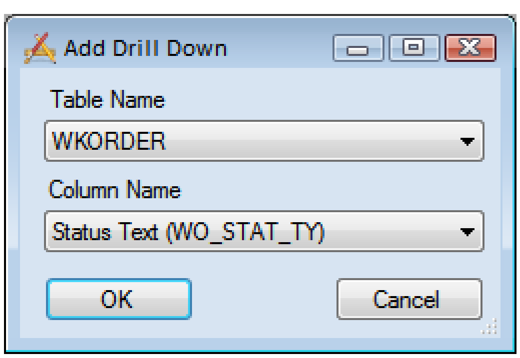


9. Click *OK* when you are satisfied with the filter.

10. The read-only filter string will be displayed at the top of the Data drill dialog. If you need to make additional changes to the filter, click the *Acquire* button again.



11. Type “Open Work Orders by Status then Problem” as the Data drill Label.
    - The record count will appear beside the data drill label on the Dashboard page.
12. Click *Add* in the Drill Downs section and select “Status Text” (WO_STAT_TY).
    - These will appear as items under the original filter on the Dashboard page. This feature provides you with a way to sort the data as it appears on the page.
    - The first dropdown beside each drill displays the database tables in the filter.
    - The second dropdown beside each drill displays individual fields in the selected table. The field you choose here will be the field by which the data is sorted.



13. Click *OK*.
14. Click *Add* in the Drill Downs section and select “Problem Text” (WO_PROB_TY).
15. Click *OK*.
16. Click *OK* on the Data Drill, Frame dialog, and the Add Dashboard Tab dialog, then click *Save* on the Add Dashboard dialog.

More Practice

Using the same filter from the last example (Nick Roland Open Work Orders), create additional data drills for:

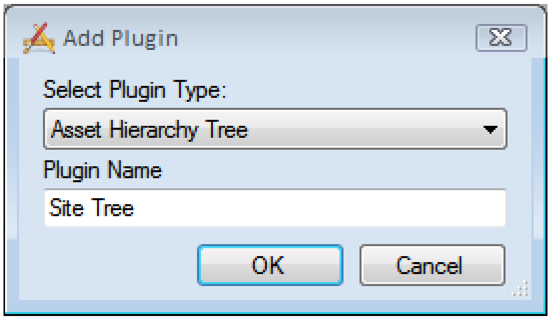
- Open WOs by WO #
- Open WOs by Reason then Main Task

Example 2

For our second example, we’ll add an Asset Hierarchy Tree to Nick Roland’s Dashboard page. Asset trees display facility assets in the following hierarchical order: Sites, Buildings, Roof, Floor, Room, Door, and Furnishings. Associated Equipment assets will appear at each level in the hierarchy. You can expand the individual asset categories to see lists of the specific assets included. Module record counts will also be indicated. Dashboard users can click on the asset names to launch the associated asset records in the Lucity Desktop application.

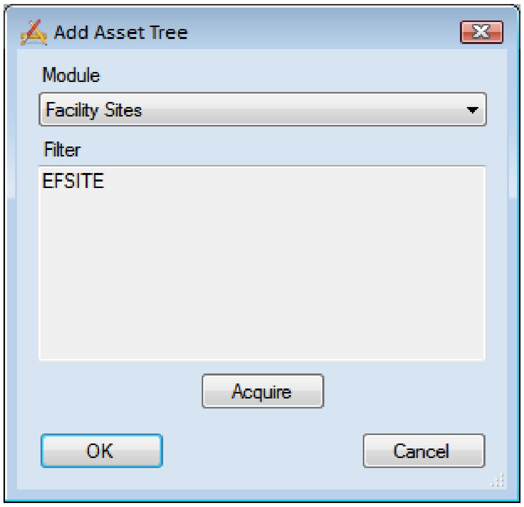
Add Asset Hierarchy Tree

1. Edit Nick Roland’s Dashboard/Preferences.
2. Edit the existing Dashboard Tab.
3. Edit any of the Frames
4. Click *Add* in the Edit Frame section.



5. Select “Asset Hierarchy Tree” from the dropdown.
6. Enter the Plugin Name, “Site Tree” and click OK.

7. Select “Site Inventory” from the Module dropdown.
    - This determines the module entry point for the hierarchical display. You can choose to begin the hierarchy tree at the Site Inventory, Building Inventory, or Equipment Inventory level.



8. Click the *Acquire* button and select “Nick Roland’s Responsibility” from the list of existing filters. Click *OK* in the Filter dialog.
    - This filter allows you to customize and limit the record set displayed from the hierarchy entry point.
    - Refer back to the steps on page 8 of this workbook to define a filter.
9. To accept your Asset Hierarchy settings, click *OK* on all dialogs and click *Save* on the Edit Dashboard dialog. Then, review the updated Dashboard page.

More Practice

For some additional practice, follow along with the exercises below to set up a Dashboard page for Jesús Hernandez, a work supervisor.

Frame 1 - Requests

Create a new Frame with the following Data drills:

1. Open Requests by Problem then Asset
2. Open Requests by Status then Asset
3. Open Requests by Status then Problem
4. Open Requests by Request #
5. Open Requests by Asset then Problem

Frame 2 - Work Orders

Create a new Frame with the following Data drills:

1. Open WOs by Lead Worker then Status
2. Open WOs by Status then Lead Worker
3. Open WOs by Status then Main Task
4. Open WOs by Status then Problem
5. Open WOs by Lead Worker then Reason
6. Open WOs by WO #

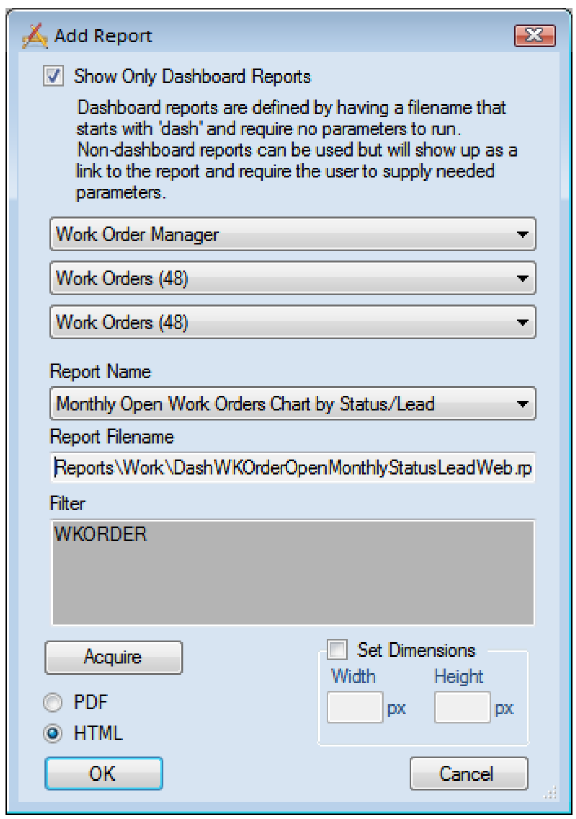
Frame 3 - Asset Hierarchy

Create a new Frame with an Asset Hierarchy Tree. Instead of starting at the "Site Inventory" level, begin with "Building Inventory".

Frame 4 - Report

Create a new Frame with a Report.

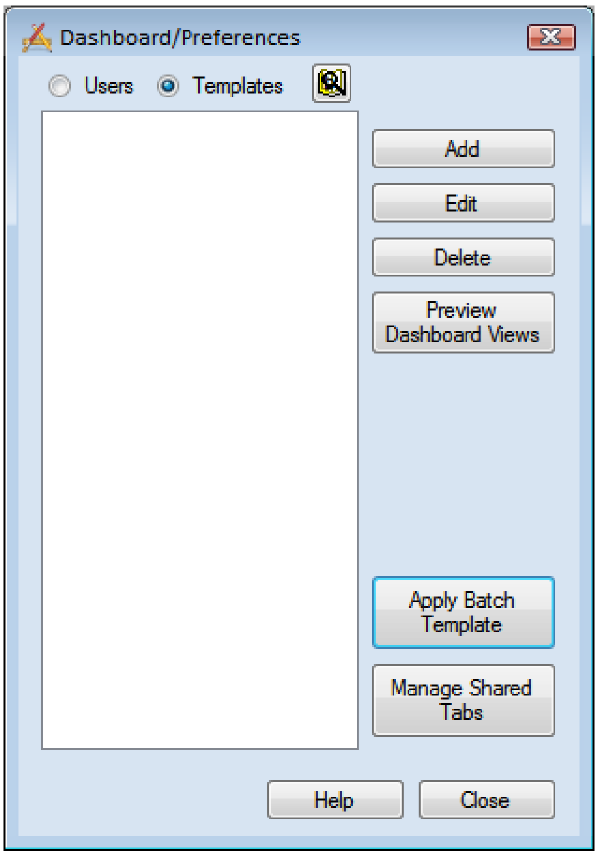
1. From Nick Roland's Edit Dashboard dialog, click *Edit* on the Dashboard Tab, and edit on the Frame dialog.
2. Click *Add* in the Edit Frame dialog and select Crystal Report.
3. Select "Work Order Manager" from the first dropdown menu and Work Orders from the Module and Module Component drop down lists.
    - o This menu lists the modules that the reports connect to.
4. Select "Monthly Open Work Orders Chart by Status/Lead" from the next dropdown menu.
5. Mark the radio button beside HTML.
    - o The PDF and HTML radio buttons allow you to indicate whether you'd like the report to appear in PDF or HTML format on the Dashboard page.
6. Click *OK* to accept your report settings.
7. Save your changes and open up the web app to view the dashboard you created.



Setting Up Templates

Templates allow you to quickly apply pre-defined general settings to users' Dashboard pages. You can define Templates for groups of users with similar needs, and then customize individual settings for specific users. The process used to set up Dashboard Templates is very similar to the one used to set up Dashboard pages. We'll point out the minor differences in the example below.

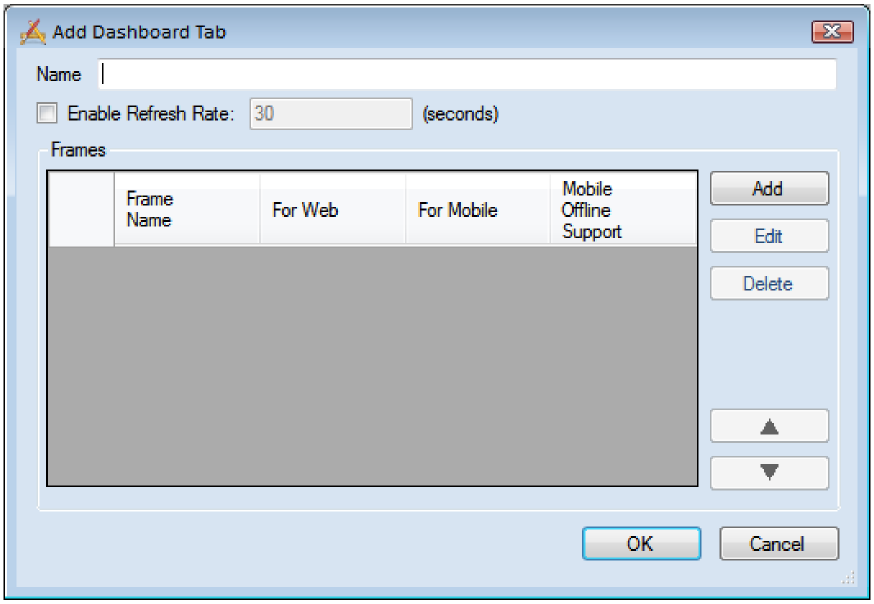
1. Select the *Templates* radio button at the top of the Dashboard/Preferences. The list of available Templates will be displayed.



2. Click the *Add* button in the upper right-hand corner.
3. You will be asked to give the template a name, type "Facility Lead Workers" in the name field. This will be the name of the template. Click *OK*.

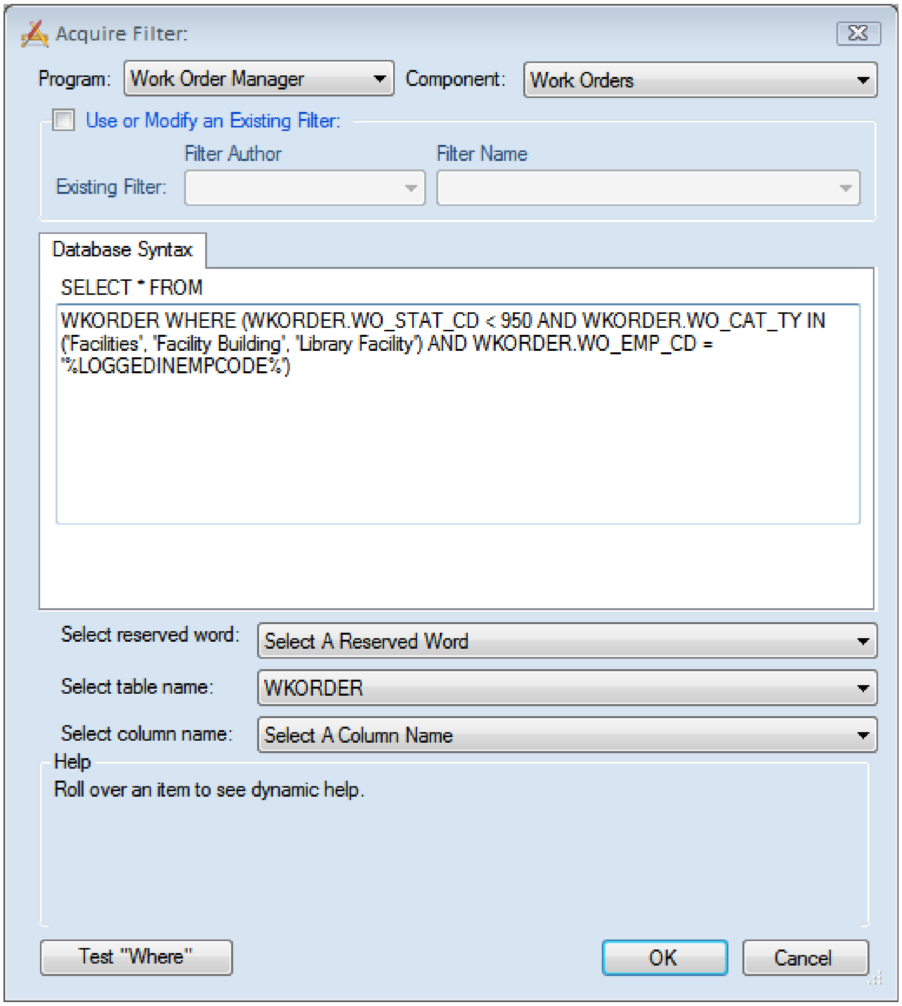
Notes:____

4. You'll follow the same steps to add Frames and Data drills for Templates as you did for individual users: Add a Dashboard Tab, then a frame, then click add and choose Data Drill. Then, in the Data drills dialog, click the *Acquire* button. We'll go over a specific filter example on the following pages.



5. In the Acquire Filter dialog, select the module, filter author, and filter name as you did before. The SQL statement will be populated in the Database Syntax tab.
6. Add the following string to the end of the SQL statement so that the entire filter string resembles the one in the image below:
   - AND WKORDER.WO_EMP_CD='%LOGGEDINEMPCODE%'
   - This is an example of a field that has a special function when used in Dashboard filters. When either '%LOGGEDINEMPCODE%' or '%LOGGEDINUSERID%' is added to a Dashboard filter, the system automatically replaces those strings with the Work Employee Code or Login ID of the currently logged in user, respectively.

Notes:____



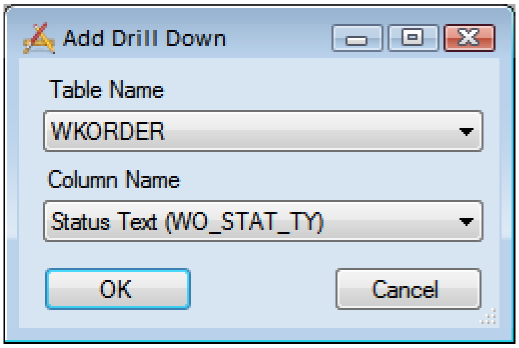
A list of all reserve words are included at the end of this manual. The Select Column Name helps you find the field name that you want to match up to the reserve word. In the example above, the WKORDER.WO_EMP_CD is found in the Select Column Name by finding Lead Worker.

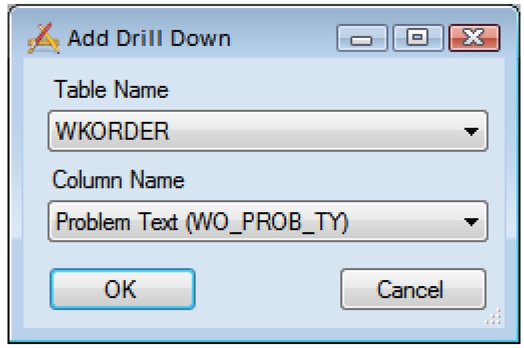
The Select table name may have two or more tables together if they are properly joined. To join two tables, the Filter needs to be modified.

Example 1: WKORDER INNERJOIN WKWOTSK ON WO_ID=WT_WO_ID WHERE … would bring in both the WKORDER (the main Work Order table) and WKWOTSK tables (the Work Order Subtask table).

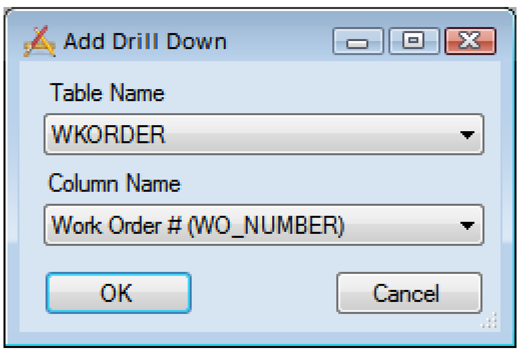
Example 2: WKORDER INNERJOIN WKRESRCE ON WO_ID=WR_WO_ID WHERE… would bring in both the WKORDER and WKRESRCE table (the Work Order Resources table).

7. Add the following two Data drills using the above filter:
    - Open Work Orders by Status then Problem





    - Open Work Orders by WO#



8. Add a second frame for "Site Tree"; begin the Asset Hierarchy Tree at the Site Inventory level.
9. Save the Template.

> *Note: Make sure you include any links that you want inside the template if you want all of the recipients to have the links.*

Notes:____

Applying Templates to Users

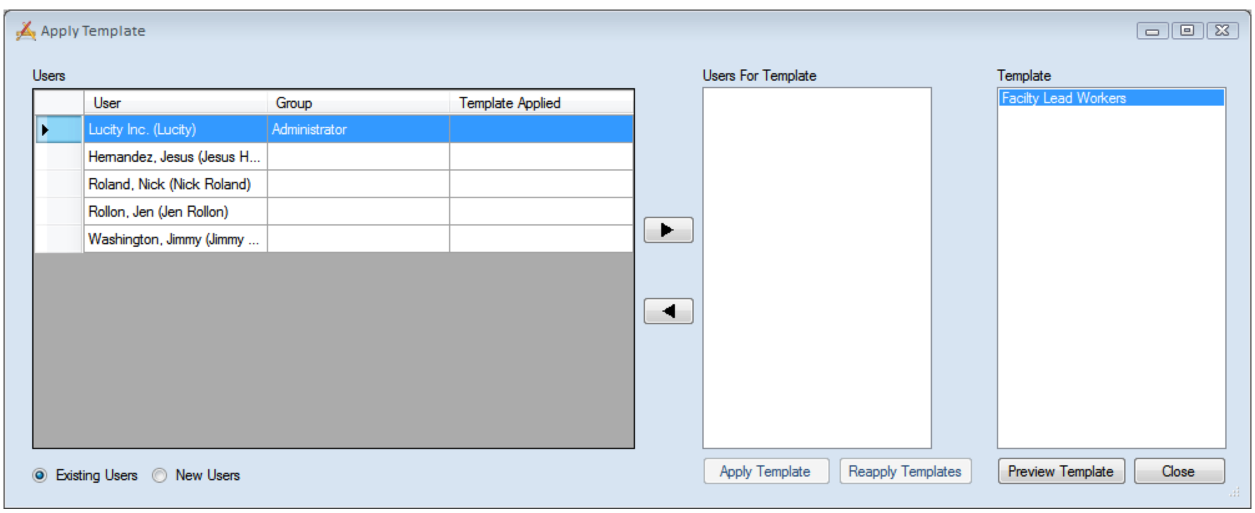
Now that you've successfully created a Template, we'll go over the steps to apply that template to a new user.

1. In the Dashboard/Preferences, add Jen Rollon as a new user.
   - Select the *Users* radio button and click the *Add* button.
   - In the Settings dialog, select "Jen Rollon" from the Name dropdown list.
2. Select "Facility Lead Workers" from the dropdown list.
3. Click the *Apply Template* button in the bottom left corner.
   - The Frames and Data drills found in the "Facility Lead Workers" template will be added to Jen Rollon's Dashboard settings (see image at bottom of page).
4. To see these settings, run the website, logging in as Jen Rollon.

Applying Batch Templates

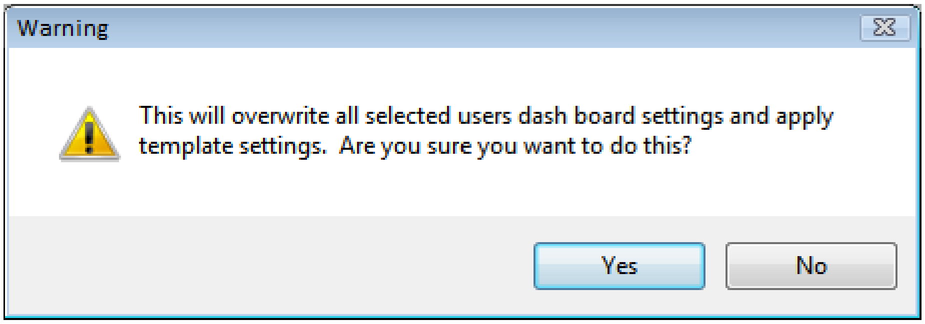
You can apply Templates to multiple users at a single time by using the *Apply Batch Template* function. We'll go over a specific example in a few moments, but first we'll modify the existing "Facility Lead Workers" template.

1. On the Dashboard/Preferences, click the *Apply Batch Template* button. The Apply Template dialog will appear.

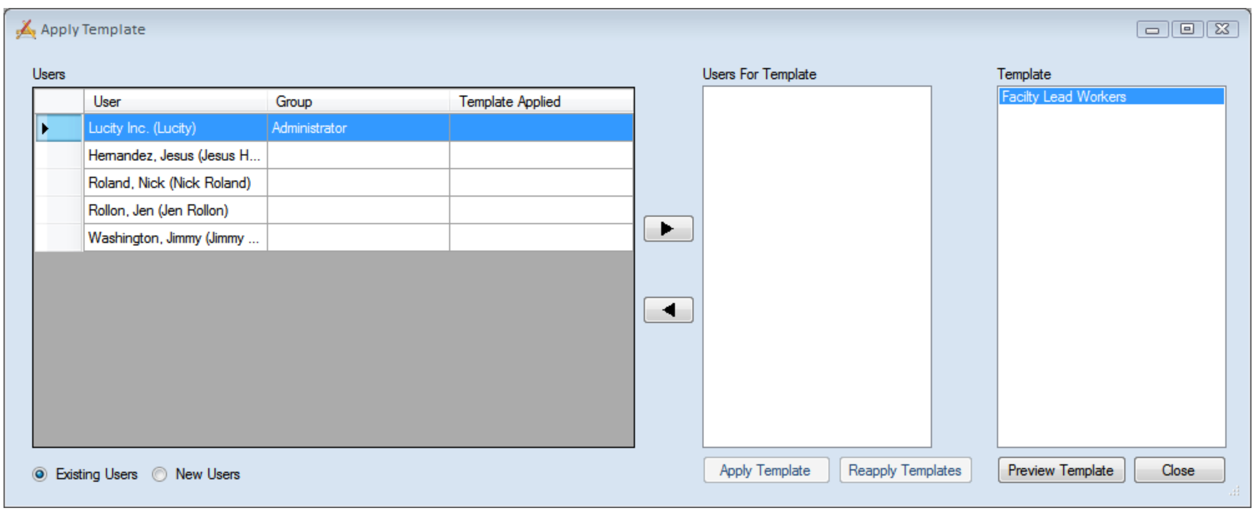


2. The radio button for *Existing Users* is the default. This shows every user who currently has had a Dashboard defined.
3. From the "Users" column, select Jen Rollon and Nick Roland. They'll be added to the "Users for Template" list by highlighting them and then hitting the move to right arrow.

4. Highlight "Facility Lead Workers" in the Template list and click *Apply Template*. The following message will appear. It informs you that this process will overwrite the Dashboard settings for the selected users and apply the Template settings. Click *Yes* to continue.



5. Now, select the *New Users* radio button. Users without Dashboard settings will be displayed in the list.
6. From the "Users" column, select Jimmy Washington. He'll be added to the "Users for Template" list.
7. Highlight "Facility Lead Workers" in the Template List and click *Apply Template*. The above message will appear. Click *Yes* to continue.
8. Now, run the website logging in as Nick, Jen, or Jimmy to view the Dashboard page.



You will notice that after applying the template the Template Applied Column is filled in. This will help you if you ever want to update this template and reapply it to the same users.

Setting up Shared Tabs

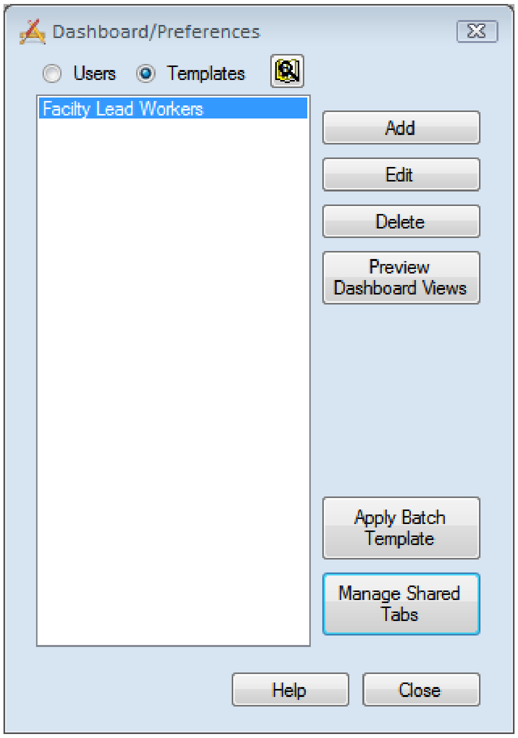
Shared tabs allow you to create a single tab and then assign to a group of users. Unlike a template once a shared tab is applied all changes to the shared tab will immediately appear on each related user's dashboard (this requires a refresh). These tabs can be applied to any dashboard or template.

This allows individual users to have custom dashboards, while giving admins the ability to provide groups of people a specific set of information.

Creating Shared Tabs

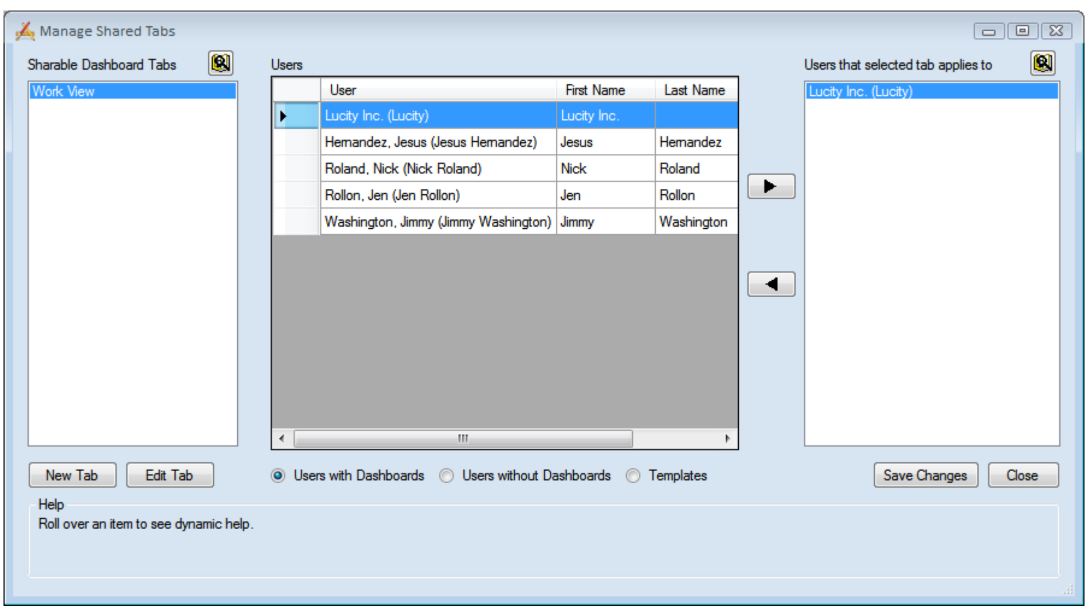
Use the following steps to create a shared tab:

1. Open up the Dashboard/Preferences dialog and switch to Templates at the top.



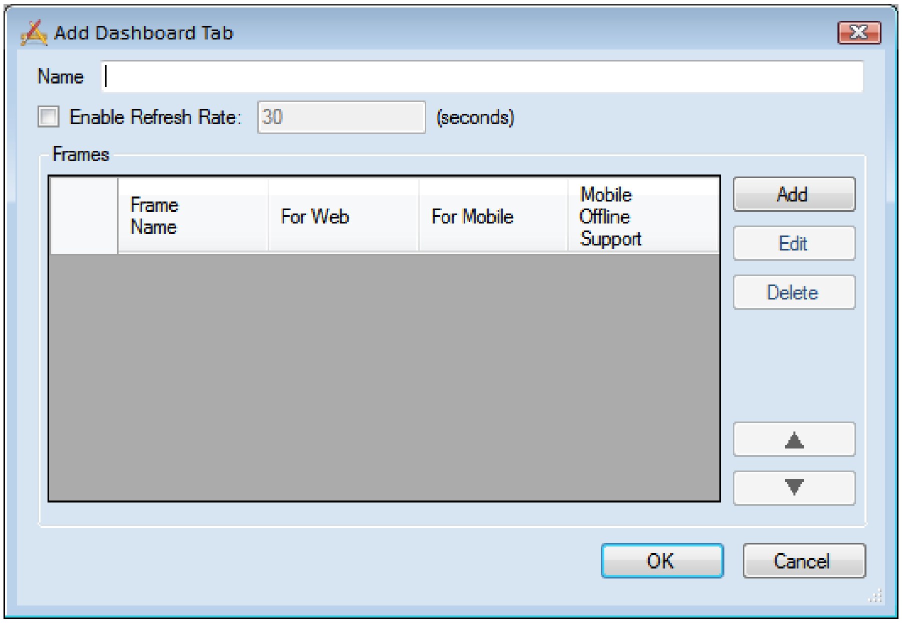
2. Click the Manage Shared Tabs button that appears near the bottom right.

3. The following pop-up will appear



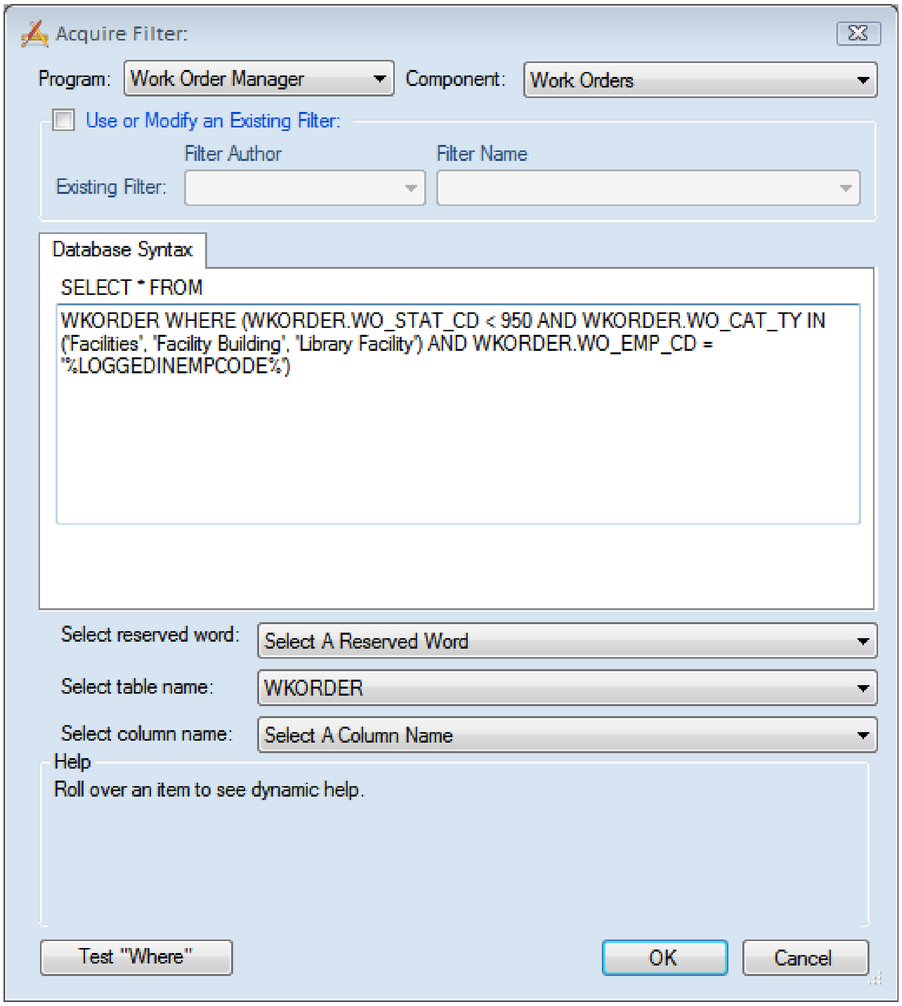
4. The pane on the left contains a list of all the shared tabs. Click the **New Tab** button at the bottom left. The Add Dashboard Tab dialog will appear.

5. You'll follow the same steps to add Frames and Data drills for shared as you did for individual users and templates: Add a Dashboard Tab, then a frame, then click add and choose Data Drill. Then, in the Data drills dialog, click the *Acquire* button. We'll re-use the filter example on the following pages.



6. In the Acquire Filter dialog, select the module, filter author, and filter name as you did before. The SQL statement will be populated in the Database Syntax tab.
7. Add the following string to the end of the SQL statement so that the entire filter string resembles the one in the image below:
   - AND WKORDER.WO_EMP_CD='%LOGGEDINEMPCODE%'
   - This is an example of a field that has a special function when used in Dashboard filters. When either '%LOGGEDINEMPCODE%' or '%LOGGEDINUSERID%' is added to a Dashboard filter, the system automatically replaces those strings with the Work Employee Code or Login ID of the currently logged in user, respectively.

Notes:____



- A list of all reserve words are included at the end of this manual. The Select Column Name helps you find the field name that you want to match up to the reserve word. In the example above, the WKORDER.WO_EMP_CD is found in the Select Column Name by finding Lead Worker.
- The Select table name may have two or more tables together if they are properly joined. To join two tables, the Filter needs to be modified.
- Example 1: WKORDER INNERJOIN WKWOTSK ON WO_ID=WT_WO_ID WHERE … would bring in both the WKORDER (the main Work Order table) and WKWOTSK tables (the Work Order Subtask table).
- Example 2: WKORDER INNERJOIN WKRESRCE ON WO_ID=WR_WO_ID WHERE… would bring in both the WKORDER and WKRESRCE table (the Work Order Resources table).

Notes:____

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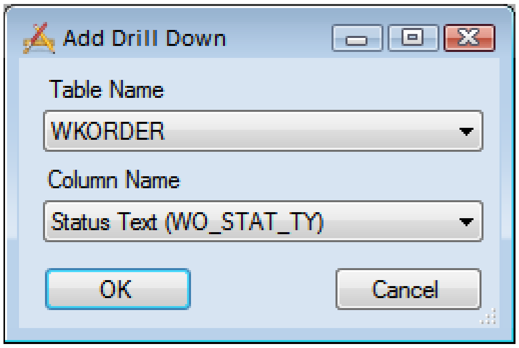
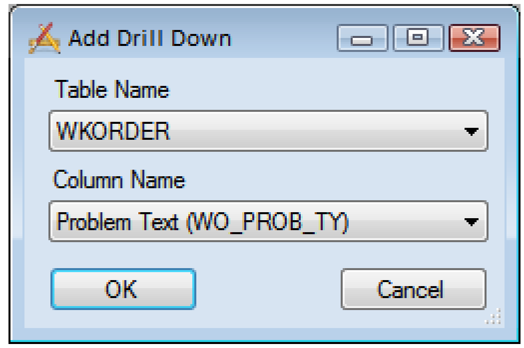
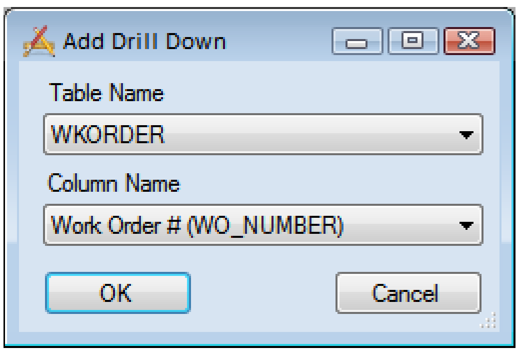
8. Add the following two Data drills using the above filter:
    - Open Work Orders by Status then Problem





    - Open Work Orders by WO#



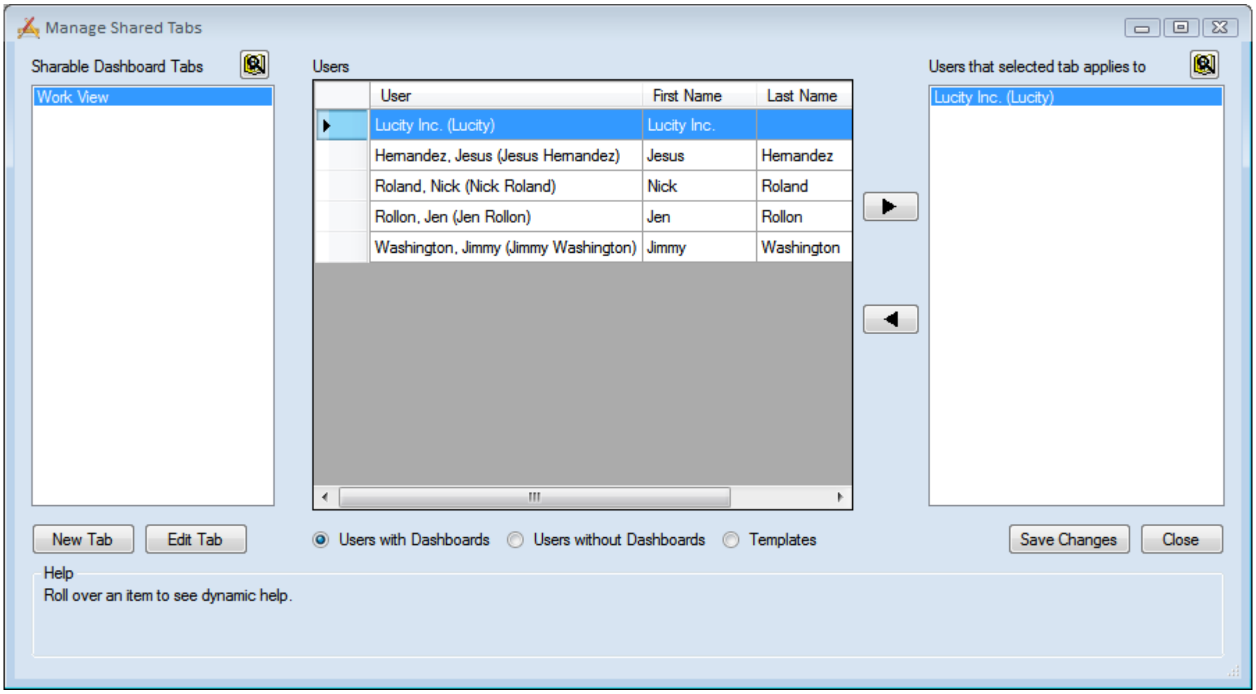
9. Add a second frame for "Site Tree"; begin the Asset Hierarchy Tree at the Site Inventory level.
10. Save the Template.

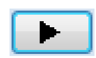
> *Note: Make sure you include any links that you want inside the template if you want all of the recipients to have the links.*

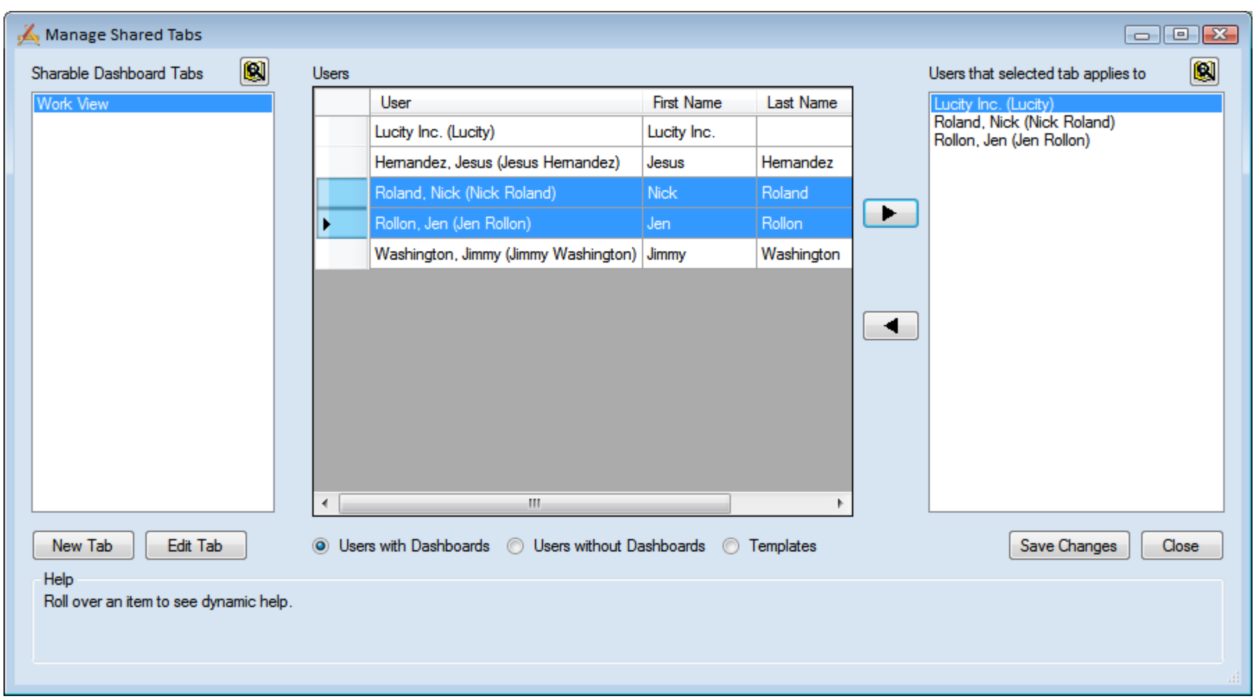
Assigning Shared Tabs

Once you have created your shared tab we need to assign it to some users.

1. Back on the Manage Shared Tabs dialog select the shared tab in the left pane.
2. Now in the middle pane find some users to apply that tab to.
    - This pane defaults to a list of *Users with Dashboards*. However it can also show *Users without Dashboards* and *Templates*. If a shared tab is applied to a user without a dashboard the system will create a dashboard for the user and then assign the shared tab to their dashboard.



3. Select Nick Roland, and Jen Rollon in the users list and click the  button.
4. Their names will now appear in the right pane.
   - The right pane displays a list of all users that the shared tab is currently applied to.



5. Click **Save Changes**. The tab is now added as the last Dasboard Tab on their Dashboard.
   - Any changes made to tab after this will be reflected on Nick and Jen's dashboards.

Security Settings

All users with login names established in the Lucity Security.exe can access the UI Admin program; however, in order to perform certain functions the following permissions will need to be granted.

Dashboard

These permissions can be found in the General – Dashboard and User Preference section.

Permission Name	Purpose	Setting
Change Default Application Colors	Allows you to change the color settings on your dashboard. This does not impact changing the Font size. The user always has the ability to edit the Font size	Off
Change Help URL	Allows you to change the URL address for the help documentation. This should only be enabled for administrators.	On
Edit Own Record	Allows you to modify your own Dashboard page.	On
General – Edit	Allows you to modify anyone's Dashboard settings. This should only be enabled for administrators.	On
Manage Dashboard Templates	Allows you to modify Dashboard Templates and assign Templates to Users. This should only be enabled for administrators.	Off

Web Forms

These permissions can be found in the General – System Configuration section.

Permission Name	Purpose	Setting
System Configuration	Allows you to perform administrative functions such as creating custom forms and grids, adding forms to menus, adding users to the Dashboard, etc.	On
Assign Windows Accounts	Allows administrators to assign Windows domain accounts to Lucity user accounts (used for integrated security).	On

More Practice

Practice setting security permissions for the following individuals:

- Jesús Hernandez (#38) – Supervisor
- Jen Rollon (#77) – Lead Worker
- Jimmy Washington (#1101) – Lead Worker

FILTER RESERVE WORD LIST AND DEFINITIONS

'%LOGGEDINUSERID%' - This maps to the Initials field in the USER_INFO table. When this string is used in a filter, the system automatically replaces it with the Lucity Login ID of the currently logged in user.

'%LOGGEDINEMPCODE%' - You must own Work to use this string. It maps to the EM_EMPL_CD field in the WKUEMP table. When this string is used in a filter, the system automatically replaces it with the Work Employee Code of the currently logged in user. In order to use this string, the Logon ID (EM_EMPLID) needs to match the employee's Initials in USER_INFO and the employee record needs to be active.

'%FISCALYEAR%' - You must own Work to use this string. It uses the current fiscal year from the Planning and Budgeting, Fiscal Year module in the Desktop application.

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

'%CURRENTQUARTER%' - Inserts the current quarter.

'%CURRENTDAY%' - Inserts the current day.

'%CURRENTWEEK%' - Inserts the current week.

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

'%SECONDHALFOFTHEMONTH%' - Inserts the second half of the month (days 15-31).

'%CURRENTMONTH%' - Inserts the current month.

'%ONEWEEKAHEAD%' - Inserts the next week.

'%TWOWEEKSAHEAD%' - Inserts the next two weeks.

'%ONEWEEKAHEADANDBEFORE%' - Inserts the next week plus previous timespan. For example, you may use this string to query for all existing open work orders as well as those that are open/due in the next week.

'%TWOWEEKSAHEADANDBEFORE%' - Inserts the next two weeks plus previous timespan.

> ***Note:*** *When using the reserved words above, make sure that you enter them in all uppercase letters and enclose them in percent symbols (%) and single quotes (').*

Restrictions: Dashboard filters cannot contain ORDER BY clauses. The program will strip out the ORDER BY clause if you try to use one. Additionally, if you are using a Filter to access the Desktop application, be sure that WHERE clauses are in uppercase. This is required for the desktop app.