TRAINING GUIDE

Web App – End User Training

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Web Applications – End User Training

In this booklet, we'll introduce you to the Lucity Web application. The Web system allows you to create custom forms to be used online. You'll use these forms to view, add, edit, and delete *Work Orders* and *Requests* as well as asset and inventory data.

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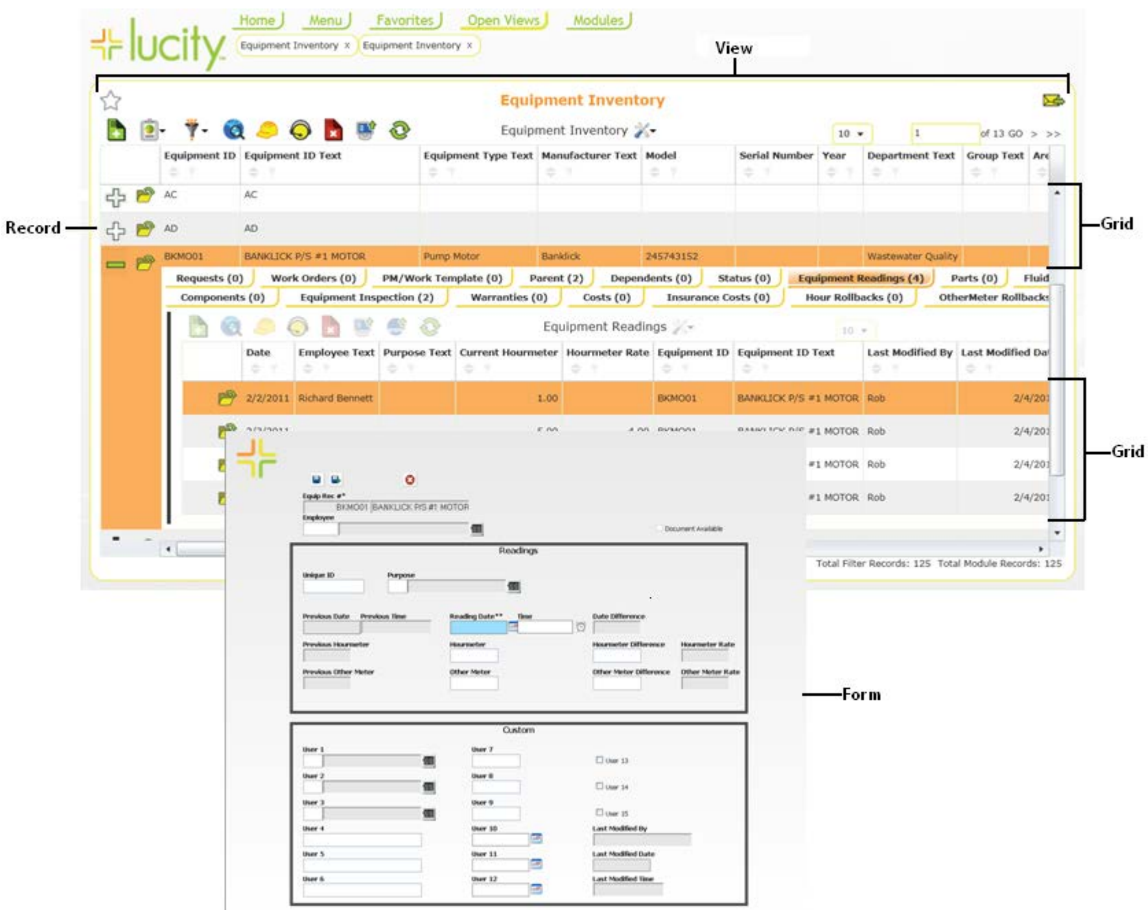
Lucity Web Definitions

The Lucity Web forms are made up of three main components: Views, Grids, and Forms. To help you understand how web forms are used, we've described these components below.

- **Views** dictate the overall structure of the online experience and display data in Grid format. A view can contain a parent grid as well as child grids (these are like the parent modules and child records in the desktop application).
- **Grids** are individual components within the Views. They allow you to create parent and child grids. Each grid can then have a Detail form associated with it. For example, there may be parent Request grids that contain child grids such as Requestors, Comments, or Tracking information. There may also be parent Work Order grids that contain child Resources, Tasks, and Tracking information. Other inventory forms can be arranged in a similar manner.
- **Forms** are used for adding new records, editing existing records, or viewing details about a single object. Data in forms is not displayed in a Grid. Forms are launched in a separate browser window. These forms may be tied to a Grid, or used alone as Request Submittal forms.

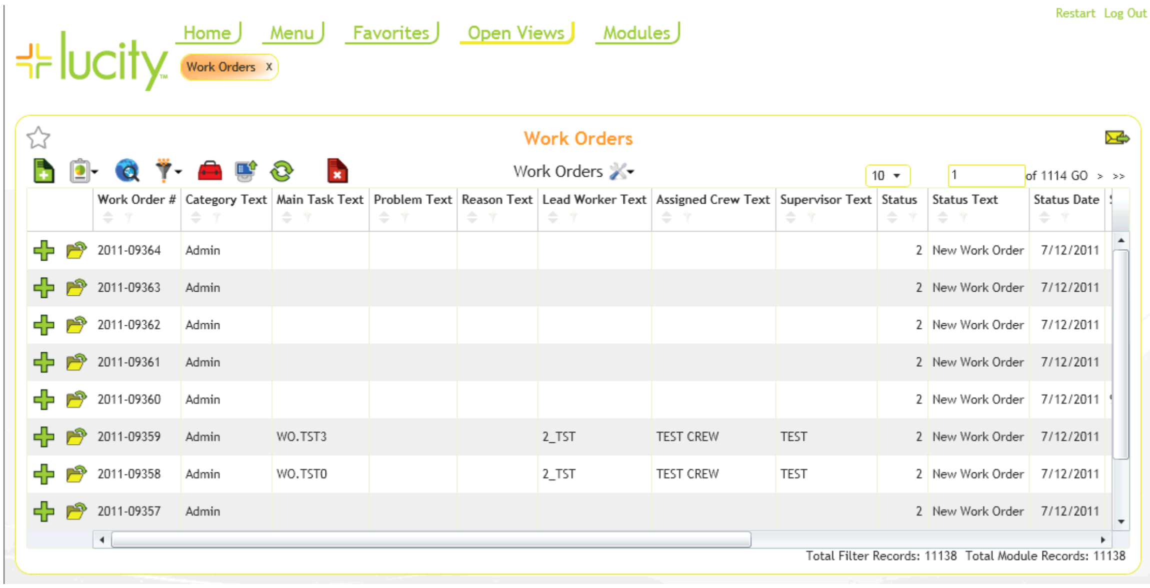


Using Custom Forms and Grids

Almost everything in the web interface is customizable. This allows administrators to setup anything from a generalized web experience that everybody can use the same or a specialized web experience for each group or users. The examples shown in this guide will cover some of that experience, but your agency's web setup might be very different. For questions about your specific web setup please talk to your administrator.

Sample Work Order View

Below, we've provided an example of an online Work Order View in Grid format. As you can see, this particular View displays 10 Work Order records. The data is displayed in columns that have been customized by the system administrator. This arrangement allows you to quickly and easily find the records you're looking for. The buttons above the grid allow you to add records, navigate through the record set, filter for specific records, and access reports, among other functions.



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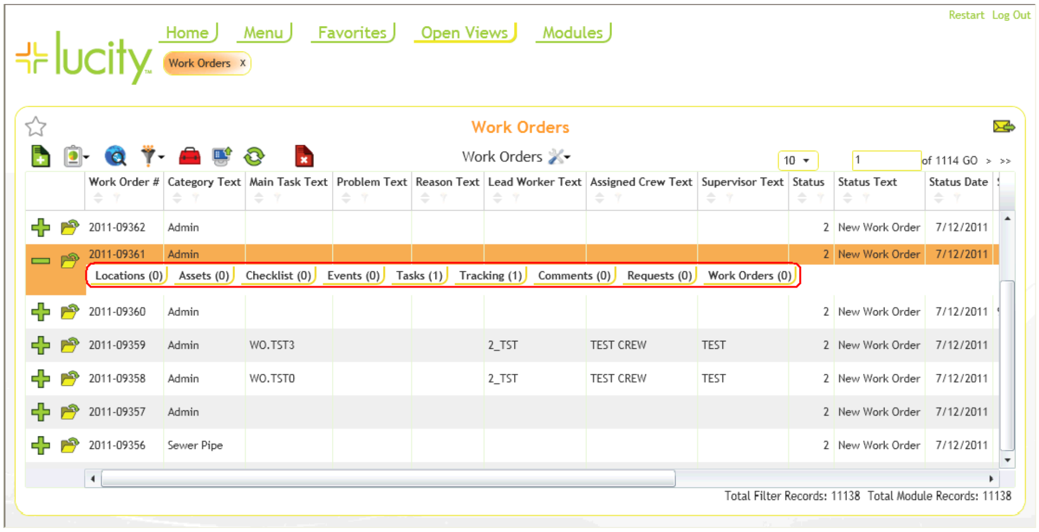
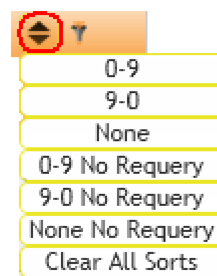
Using the View

The View can display multiple parent and child records in grid format. In our sample Work Order View there are a number of parent Work Order records.

In the example below, the main Work Order grid contains seven child grids: Location, Assets, Checklist, Events, Task, Tracking, and Comments. The number of child records in each grid appears beside the name.



You can sort information in the View by clicking on a column heading, or clicking the drop-down arrow beside the Column Filter buttons. There you'll see options to sort by ascending or descending order. The System will support multiple column sorts at a time. You can also stretch column widths to see the entire text of a cell.



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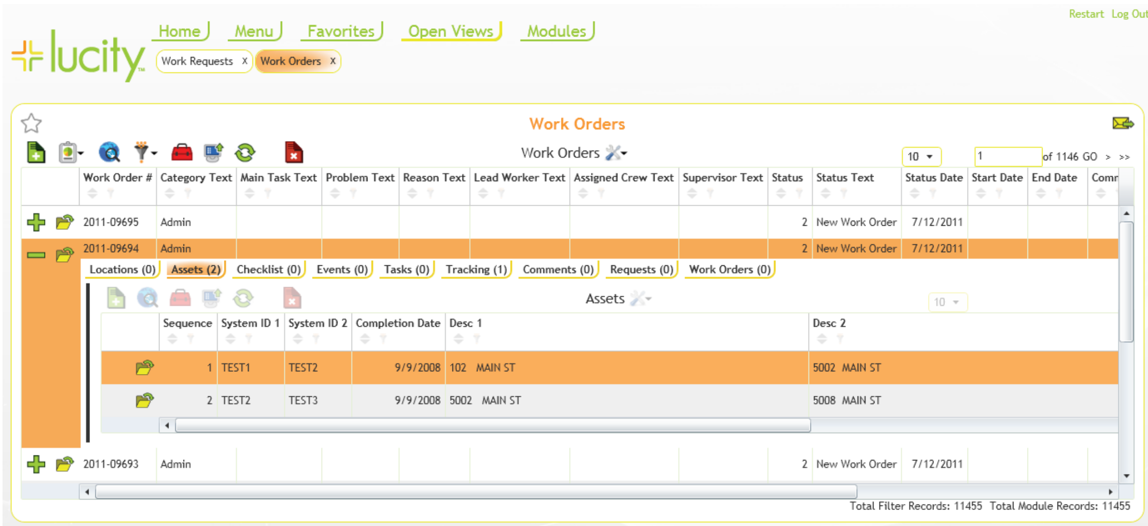
Using the Grids

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



Next to each record in a grid two buttons may appear:

Click the plus sign  next to each record to access the available child grids. If the plus sign is green, the record has a child record. The plus sign will be white if the record does not have a child record. The number of child records found in each grid type is displayed in parentheses beside the grid name.

Click the folder sign  next to each record to open that record in a Form. This allows you to see more detailed information. Most forms also allow users to edit attribute information for a record.

Using the Forms

Each child grid can contain multiple Forms. Forms are used for adding new records, as well as viewing and editing existing records. By clicking on a listing in the child grid you can access the Forms. Each Form will be launched in a separate browser window. These forms can be customized by your administrator and will have different fields available. Changes made to the values in the fields on these forms will also be reflected in your desktop application and possibly GIS.

You can navigate through the fields on the form by using the Enter key (read-only fields will be automatically skipped). Or, click with your mouse in the desired fields. You can also use key combinations of Shift + Enter to cycle backwards through the fields, and Ctrl + Enter for carriage returns in multi-line text boxes (such as Comment fields).

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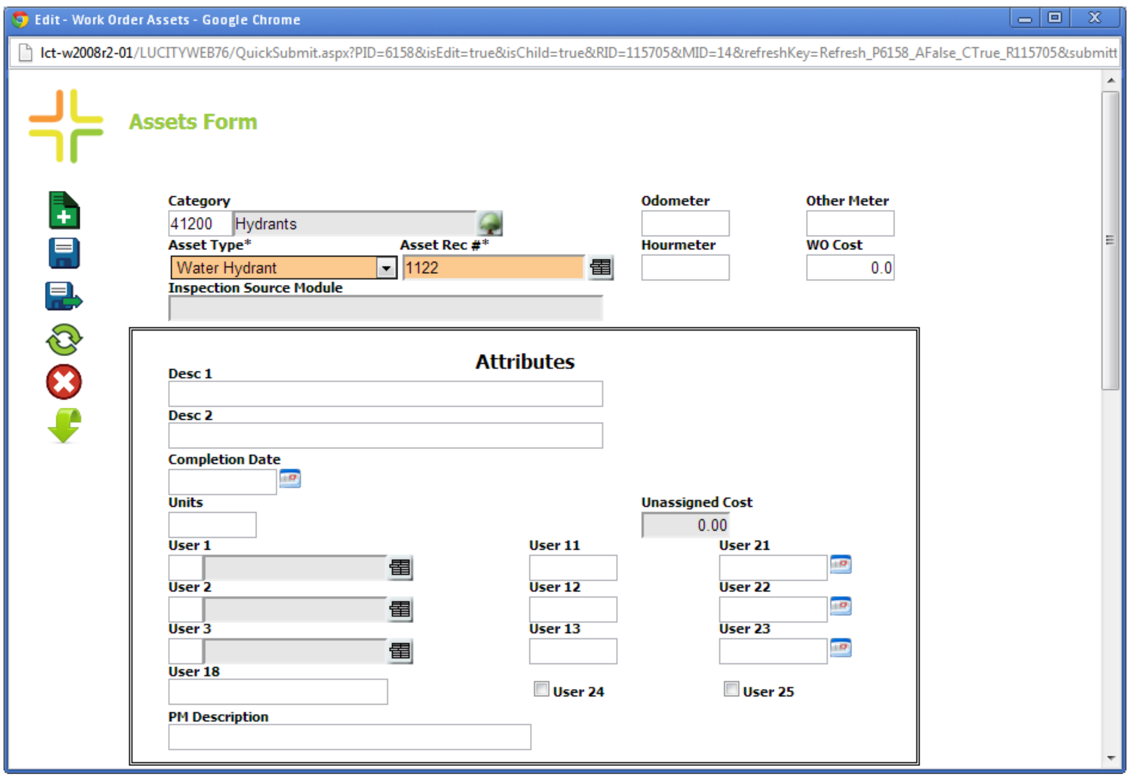
Several fields on the Detail Forms allow you to use the F5 key to copy a value from one field to another. These are listed below:

- In Requests, from the Phone field to Home Phone, Phone 1 or 2, or Work Phone.
- In Work Orders, from the Start Date to the End Date.
- In Work Orders, from the Total Cost to the Billing Amount.
- In Fleet Travel Log, from the Start Date to the End Date.



Using the Toolbar Buttons

The Web toolbar contains buttons that access or perform a variety of standard program functions. Many of these functions are similar to those found in your desktop application. Place your mouse over each icon to see the name/function of that particular toolbar button. The following list contains a brief description of each button.

Icon	Name	Function
	***Add***	Adds a new record. Launches a new window with the Detail Form for the highlighted record type on the web page.
	***Reports***	Opens the Reports dialog. These include your organization's custom reports as well as the standard Lucity reports.

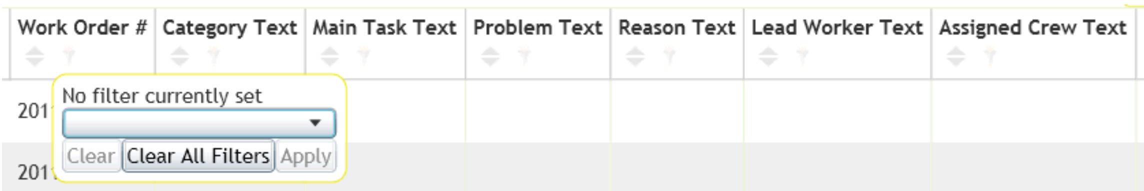
	Show in Map	Opens either a web map or your ArcMap project. Zooms in and selects all assets, X/Y coordinates, and/or addresses found in the selected Work Order, Request, or child dialog.
	Filter	Narrows your search for a specific record or set of records.
	Create Work Order	Generates a work order for the highlighted or filtered Request, Inventory, or Inspection records. This can create a work order for all records or one work order for each record.
	Create Request	Generates a work request for the highlighted inventory records.
	Create PM/Template	Generates a work pm/template for the highlighted inventory records.
	Launch in Desktop	Opens the selected record(s) in the Desktop application.
	Refresh	Refreshes the display.
	Export Current View	Allows users to export the data in the current grid (no child grids) into a csv file which is then emailed to them.
	Delete	Deletes all selected records.
	Toolkit	Opens the Toolkit dialog. Toolkit functions vary by form. i.e. Populate Completion Dates, Create Work Order with Selected Assets, etc.
	Attach an Existing Record	Attaches a existing inventory record to the selected inventory record.
	Detach Selected Records	Detaches the record from its parent record. This option does not delete the record from the database.
	Open in another View	Opens the selected data in a new view in the web application.
	Subsets	This tool allows users to save a group of records for later use. This can also be used to modify saved subsets.
	Documents	This tool allows users to upload and attach documents to a record and then to view those attached documents,
	Editable Grids	This tool is only in the Work Order module. It opens up a page that displays grids of work order resources for a task. The values in the grids can be edited quickly. **Work Order Toolbar** – Click it there to open the resources related to the first task in the Task list. **Work Order > Tasks Toolbar** – Click it there to open the resources for the task currently selected in the task list.

Note: *When you create a new work order or request the system will open the corresponding default view in a new tab if one exists. If a default view does not exist, the work order or request will still be created in the database but will not appear on screen. Instead, a notation will appear above the grid indicating that the operation succeeded.*

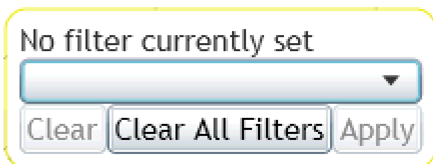
Column Filter

This web-tool works in a different manner than the desktop Filter tool. To use the Column Filter tool on the Lucity Web site, follow the steps below:

1. Column Filter buttons are found at the top of each column on the Grid and are present only if there is more than one full page of records. A sample appears below:



2. Determine which column you would like to use to search for data. The system supports multiple column filters at a time. In the example above, you can choose to sort by ascending, descending, etc.
3. Click on the appropriate column's Filter button. A dialog will appear:

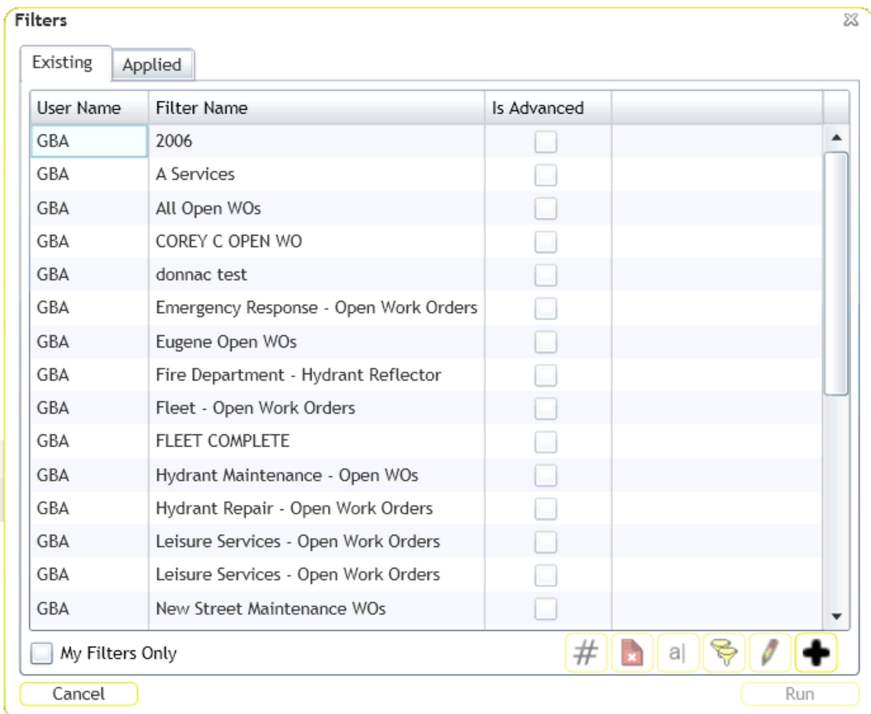


4. Choose the way in which you would like to search for data. The first drop-down list will contain some of the following choices based on the type of data in each column:
   - Starts With
   - Does Not Start With
   - Ends With
   - Does Not End With
   - Contains
   - Does Not Contain
   - Equal
   - Not Equal
   - Is Empty
   - Is Not Empty
5. You can then enter the data you would like to search for in the second field and click *Apply*. The tool will display only the records matching your criteria.
   - If using the column filter tool on multiple columns at a time, each additional column filter criteria will serve to further limit the records displayed.
   - Using the example above, you could set a column filter on Category Text Starting With "C" and Main Task Starting With "RE". This would return only those records that meet both criteria.

6. After you have defined column filter criteria for a column, the column filter icon will be highlighted . Hover your mouse over the icon to display the current settings.
7. To remove column filter criteria, click on the red column filter icon and select *Clear Current*.

Filters

A Filter helps you narrow your search for a specific record or set of records. When you click the Filter button the Filter dialog will appear. It contains existing (saved) filters as well as a tool to create new filters.



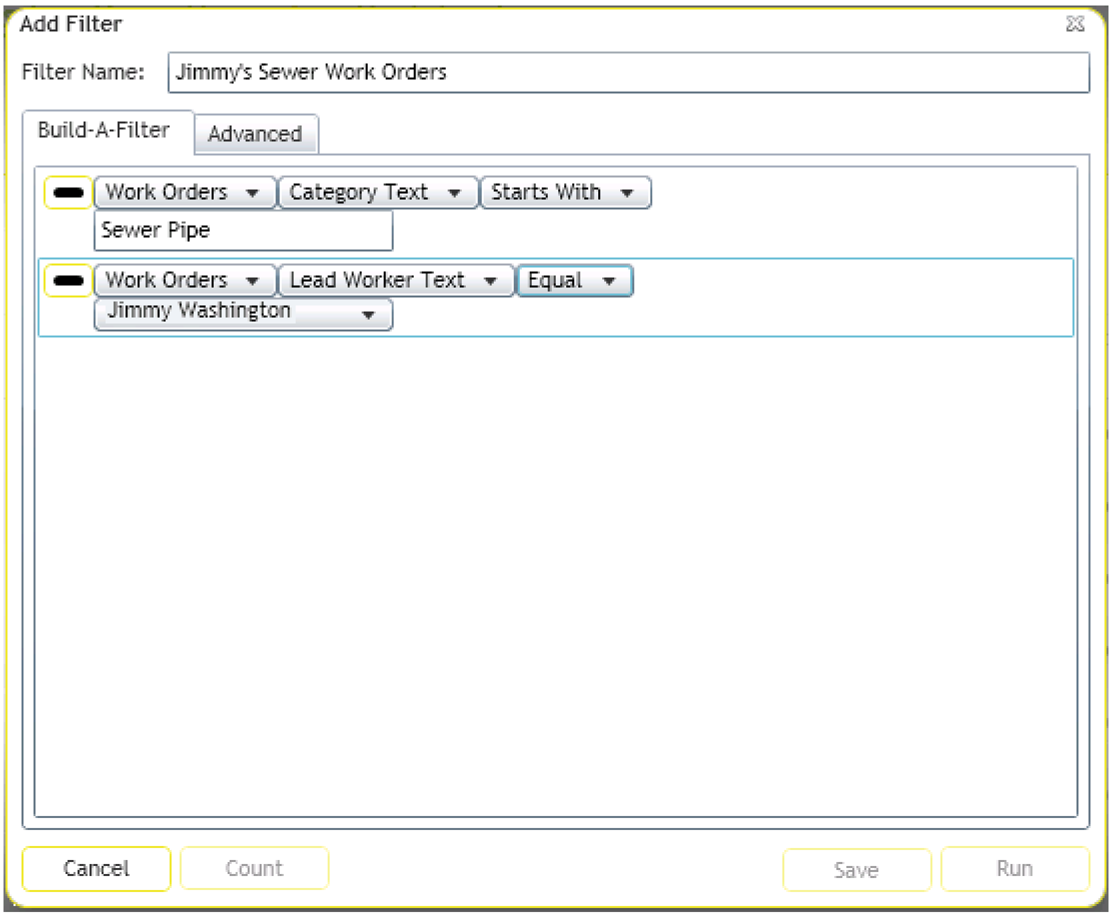
1. The "My Filters Only" box is marked by default. This means that only filters created by the logged in user will be displayed. To display filters created by other users, uncheck this box.
2. To use an existing filter, highlight a filter name and click *Run Filter.* The filtered record set will be loaded onto the web page.
3. To delete an existing filter, highlight a filter name and click the delete button .
4. To display the number of records that a certain filter will return, highlight a filter name and then click the *Count* button #. The number of records will be displayed in a separate dialog.

5. The change the filter name, highlight a filter and click the Rename button. A dialog will appear prompting you to change the name.

6. To copy the filter, highlight a filter and click the Copy Filter button. A dialog will appear allowing you to edit and save the copied filter.

7. To edit a filter, highlight a filter and click the Edit button. The Edit Filter Dialog will open.

8. To add a filter, click the add button.



- Use the initial drop-down list to select the field by which your records will be filtered. This list contains nearly all of the fields in the Lucity database, including Memo (Comment) fields.

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- After selecting a field from the first list, a second drop-down list will appear. This list contains the following filter modifiers:
    - Starts With
    - Does Not Start With
    - Ends With
    - Does Not End With
    - Contains
    - Does Not Contain
    - Equal
    - Not Equal
    - Is Empty
    - Is Not Empty
    - Greater Than
    - Greater Than or Equal
    - Less Than
    - Less Than or Equal
    - True
    - False
- In the blank field that appears, enter the specific field content you are filtering for.
- If you'd like to add an additional field to the filter, click the big plus sign button. You'll then repeat the above process with additional drop-down lists, allowing you to select a new field and define filter criteria. Each added field creates an "And" statement and serves to further limit the filterset.
- If you add the same field multiple times to the filter, it creates an "Or" statement.
    - For example, if you include the following in your filter: Problem Contains "xyz", Problem Contains "abc". The resulting filterset will include all Problems that contain either "xyz" or "abc".
    - You should not use a filter statement like the following: Problem Does Not Contain "xyz", Problem Does Not Contain "abc". The resulting filterset will contain all problems (all Problems that do not have "xyz" or all Problems that do not have "abc".
- To remove a filter field, click the big minus button.

1. If you'd like to save the filter, enter a unique filter name and click the *Save* button. This filter will then be available for use at a later time.

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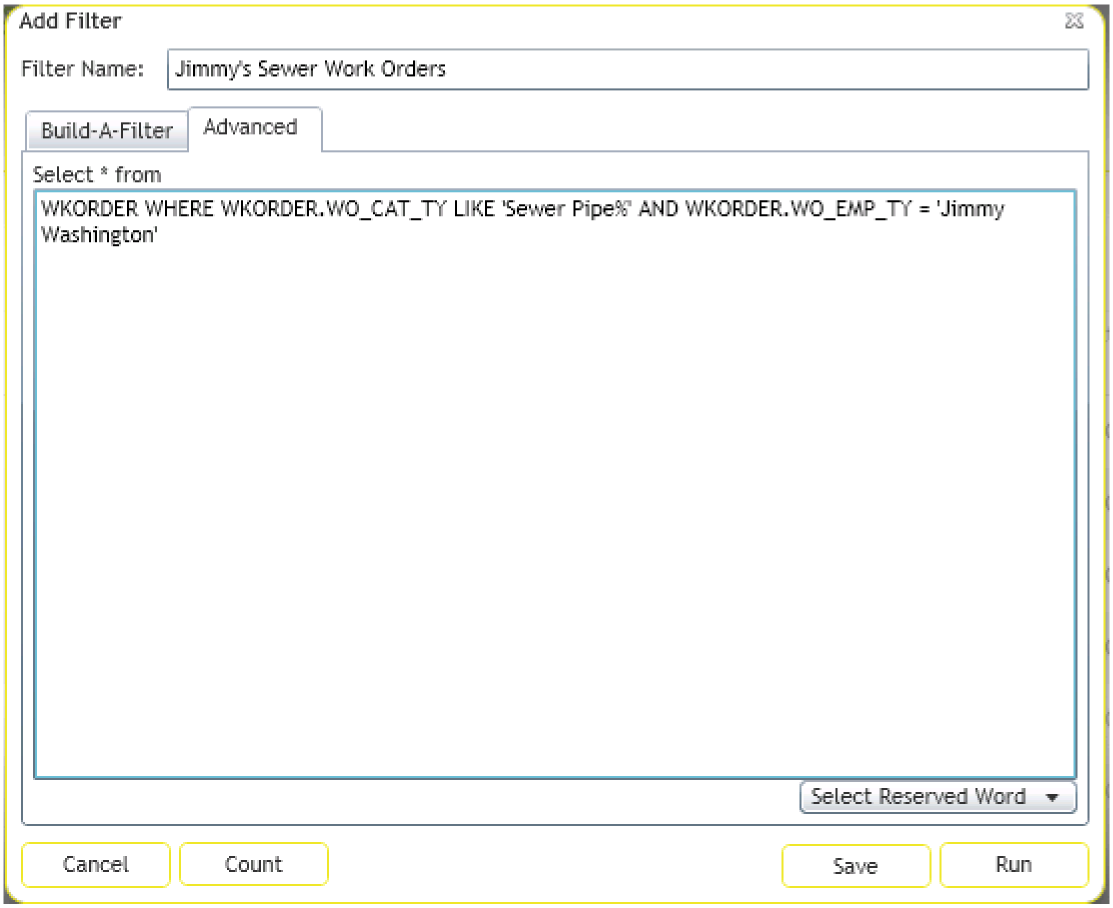
2. The Filter dialog also contains an Advanced Filter tab. If a standard filter will not provide the necessary results, it is possible to use an advanced filter to query for specific records.
    - You should have a working knowledge of SQL Query Syntax before attempting to use Advanced Filters. For most users, the Build-A-Filter screen will be sufficient.



- Use the window provided to enter or modify the SQL Statement.
- Click the *Count* button to check the filter string and determine how many records will be returned.

3. Click *Run* when you have finished building your filter. The new filtered dataset will appear.

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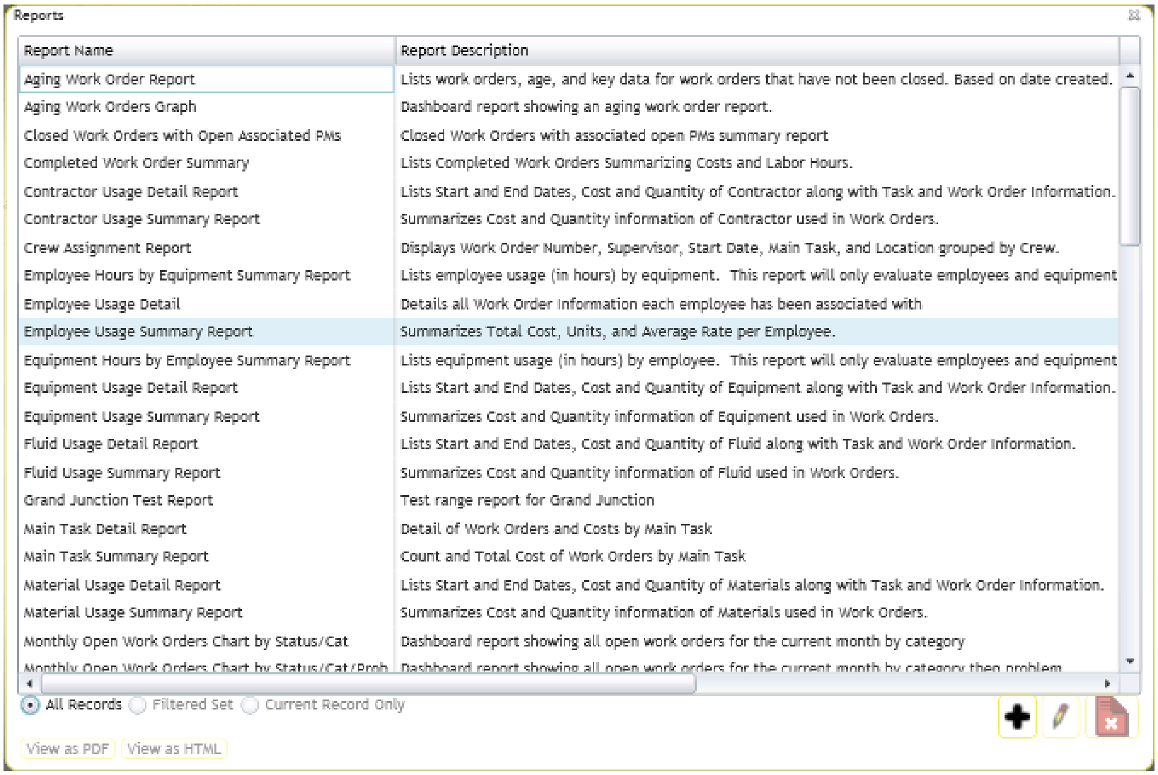
Reports

This web-tool also works in a different manner than the Desktop Reports tool. Follow the steps below to use this toolbar button:

1. Click the Reports button  to open the Reports dialog. The following window will be displayed:

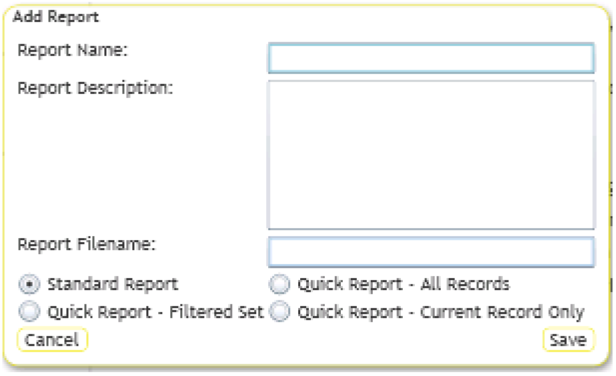


- This dialog displays each report by name. It also lists a brief description of each report, the report file name, and indicates whether the report is a Quick Report for the current user.
- Note that the reports listed here include your organization's custom reports as well as the standard Lucity reports.

2. To limit the record selection included in the report, use the radio buttons as follows:
   - **All Records** – The report will include all records in the module.
   - **Current Record Only** – The report will only include the information on the current record.
   - **Filtered Set** – The report will include all records in the current filtered set. *Note:* You cannot run reports on the Filtered Set if the Filter is created on a Comment field.
3. To view a report, highlight a report name and click *View PDF* or *View HTML*. The report will be displayed in a separate window. Note that PDF reports will be limited to 10 pages.

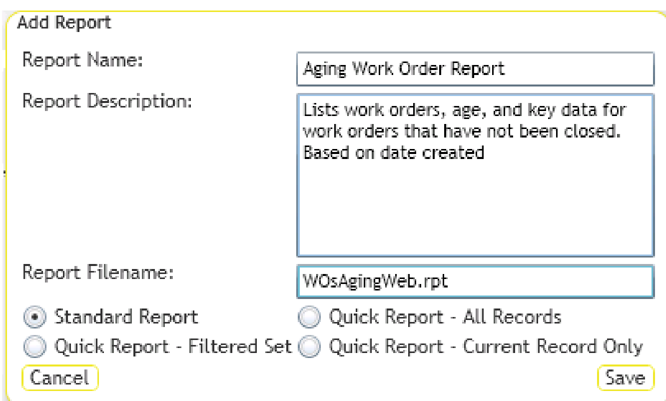
4. To add a new report, click *Add*. The following dialog will appear:

   - Note that this dialog does not provide you with a way to upload reports. Reports must be posted to the web server in the \Reports directory in order to be available online. There you'll see sub-directories for \Equip\ and \Work\, other programs. Reports should be placed in the appropriate sub-directories. If you do not have access to the web server, consult your system administrator.



   - Indicate the report name, description, file name, quick report status, and any limitation on the record set.
   - Click *Save* when you are finished defining the report. It will be added to the reports list in the previous window.

5. To edit a report name, description, or designate a report as a Quick Report, highlight a report and click *Edit*. The following window will open:



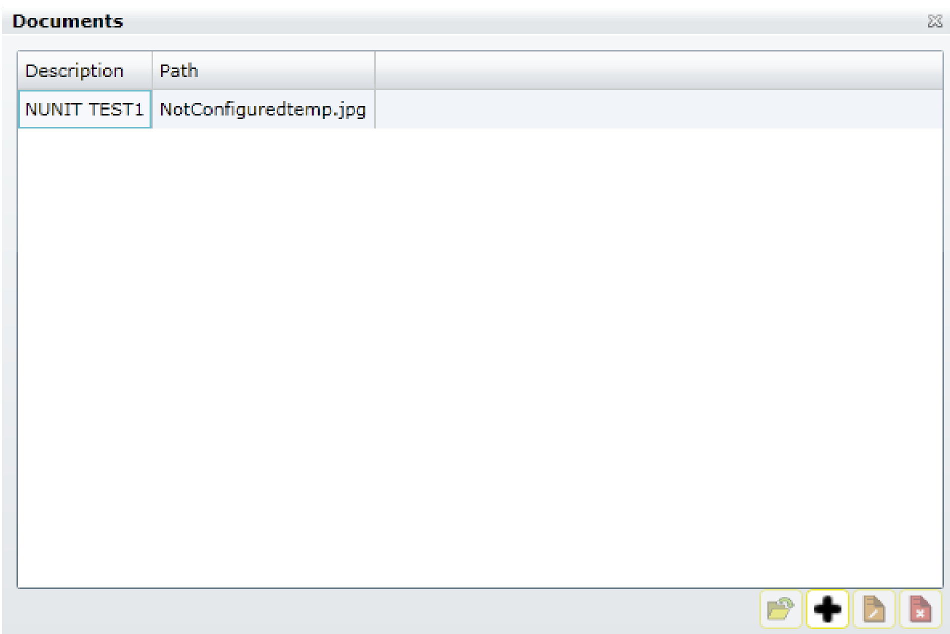
   - Click *Save* when you have finished making your selections.
   - Quick Reports are displayed in the drop-down menu. beside the Reports button. To access a Quick Report, simply click on the report name and it will immediately open in a separate window. Quick Reports are generated as PDF reports and are limited to 10 pages.

Launch Desktop Records

An additional feature in the web application allows you to highlight one or more rows in the grid and then click the *View Selected Record(s) in Desktop* button to open those records in the Desktop application. This allows you to quickly access records from the web interface.

Document Control

This tool allows users view documents that are attached to an asset and attach new documents. To use this tool select an asset in the grid and then click the document button. The following window will appear:



- To open a document select a document from the list and click the open button. The document will be opened by your computers default program for opening that kind of document.

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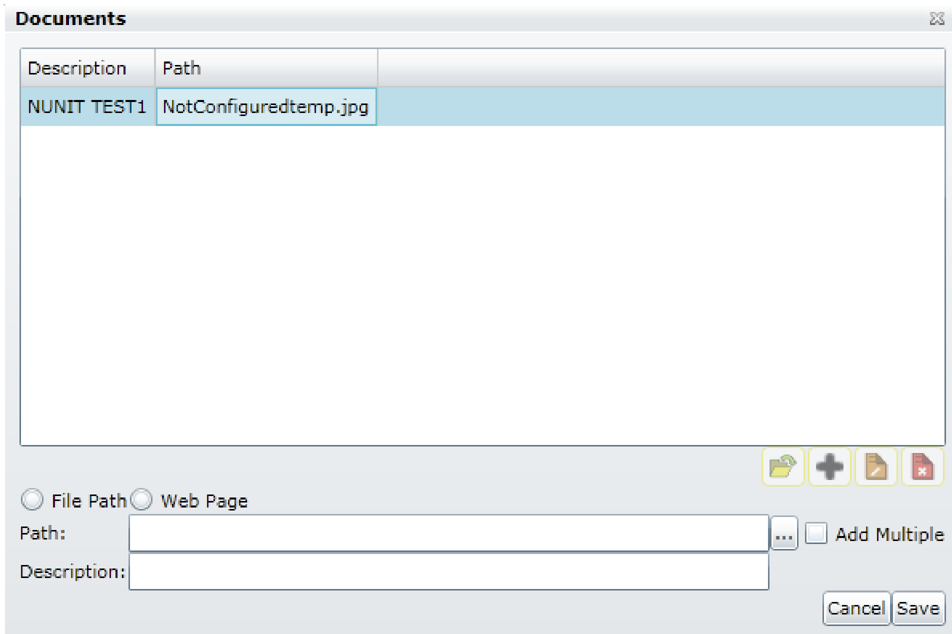
- To add a document click the add button ➕. The following dialog will open:



- Enter a Description and browse to the desired document.
- To select multiple documents check the Add multiple box first.
- When complete click Save.
- It is important to remember when adding documents that the document is only linked to the asset in Lucity. If the document is deleted it will no longer be accessible. If the document is on your computer and not available to the network, other users will see that it is attached, but will not be able to view it.

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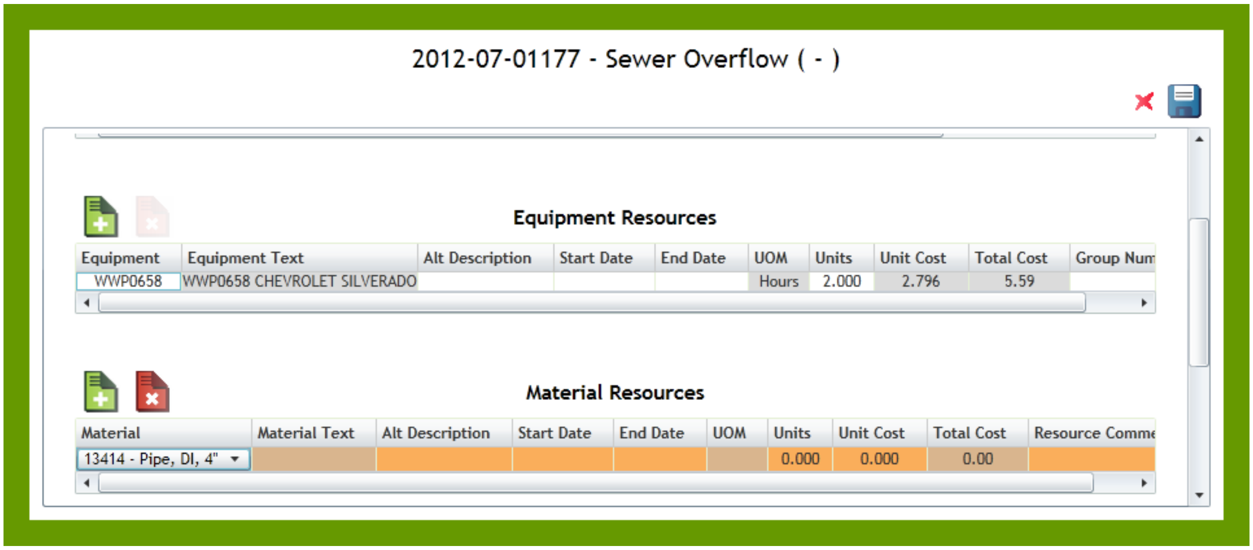
Editable Grids

The editable grid is only for Work Order Task, and allows users to add resources to a work order task, and edit multiple resources at once. To use this tool go to a work order view and click the button. The editable grid page will open. There will be a grid for each type of work order resource that was available for that task.



- To add a resource find the grid it should go in and click the add record button.
- To edit a resource click in the field to edit and make changes.
- You can use the arrow keys or Tab key to move through the fields in the grid.
- To delete a resource select it in the grid and click the delete record button.
- After making changes click the save button to save edits and close the grid. Choosing the cancel button will close the grid and

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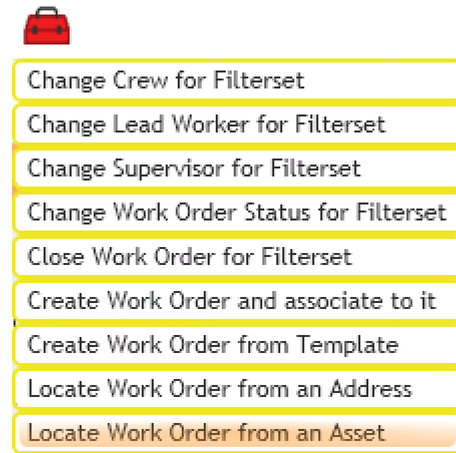
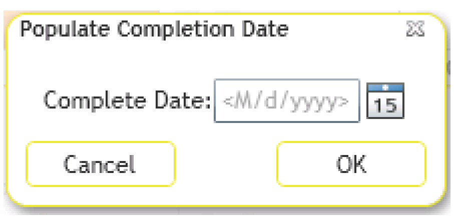
Toolkit

Some Views and Forms will contain Toolkits. These Toolkits provide you with special functions designed specifically for each type of form.



1. To access the Toolkit, highlight one or multiple records in the grid and click the dropdown arrow beside the Toolkit icon. Select the tool you'd like to execute and the Toolkit dialog will appear.
    - Different Toolkit options will be displayed based on the type of records highlighted.
    - When the Toolkit dialog is displayed, it will contain different editable fields based on the selected tool.
    - Some Toolkit operations are performed automatically; they require no other input from the user. When these functions are complete, a notation will appear in red text above the General Form indicating "Operation Succeeded".

3. A sample Toolkit option is displayed below; however, many more functions are offered that vary by form. At this time, the Toolkits are not customizable.
    - The example below comes from the Work Order Tasks Detail Form. Here, we've selected the tool to Populate Completion Date. Users can then enter the completion Date.



4. For Toolkit functions requiring user input, click *OK* when complete. The data entered will be applied to all highlighted records.

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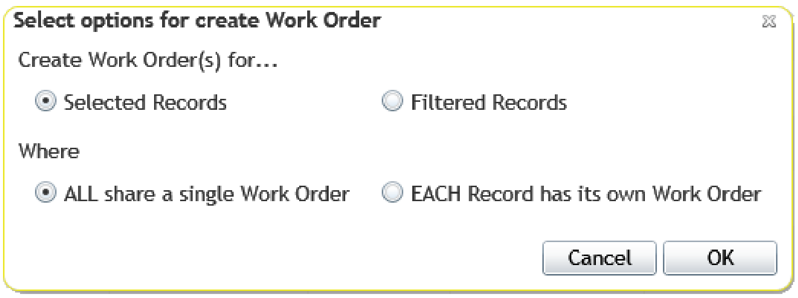
Create Work Order

The create work order tool allows users to create new work order records directly from assets, inspections or work requests. This tool can either create a work order(s) for the records currently selected in the grid or the entire filterset. It can also create one work order for all of the records, or create one work order for each record.

1. Go to the desired module and create a filter of records or select the desired records in the grid.
2. Click the  button on the toolbar.
3. The following popup will appear:



4. Choose whether the work order will be created against the **Selected Records** or against the entire set of **Filtered Records**.
   - If there is more than one selected or filtered record the **Where** section will be visible.
5. Select whether all the records will share one work order or each record will get its own work order.
6. Click ***OK***. One or more work orders will be created based on the selections.

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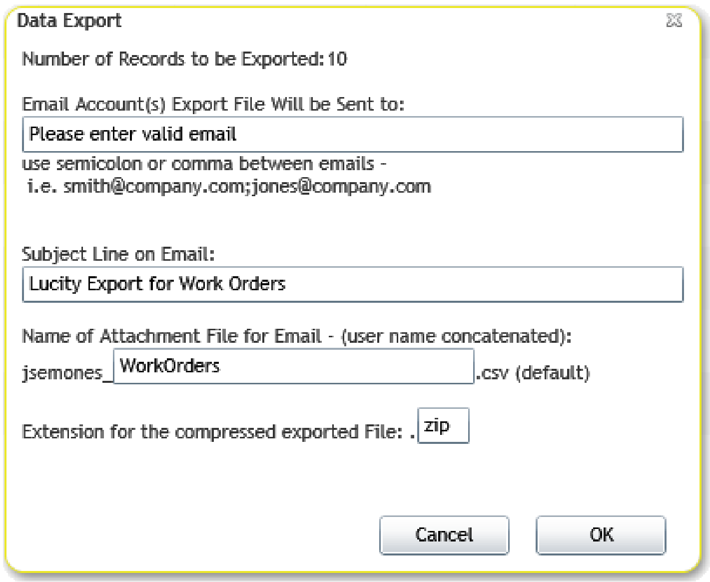
Export Current View

Sometimes it is useful to be able to get data out of Lucity. The export current view gives users this option. It exports your current view into a .csv files, zips it up and then emails it to a specified address.

1. Find the module to pull data from.
2. Create a filter that displays the records to export
3. Click the button. The following pop-up will appear:



4. Fill out the ***Email Accounts*** field.
5. Change the other settings as desired.
6. Click ***OK***.
7. The data will be exported and emailed.

> *Note: This will only export data in the view you are looking at. It does not export data for related or child records.*