TRAINING GUIDE

Web Apps – System Setup Training

Web Applications – System Setup

In this workbook, we'll introduce you to the Administrative User Interface. You'll use this program to set up and customize the look and content of the web-based forms in the Lucity Web application. In addition, the Admin UI allows you to create online menus, assign forms to menus, and give users access to specific menus. These steps enable users to view, add, and edit forms online.

The most important feature to keep in mind is that each web-component created in this program is fully customizable; the images included in this workbook are examples. With this program you have the power to create forms for any and all uses that you can imagine. Here, we've included the basic steps to create your web-based system. What you do with these steps is up to you!

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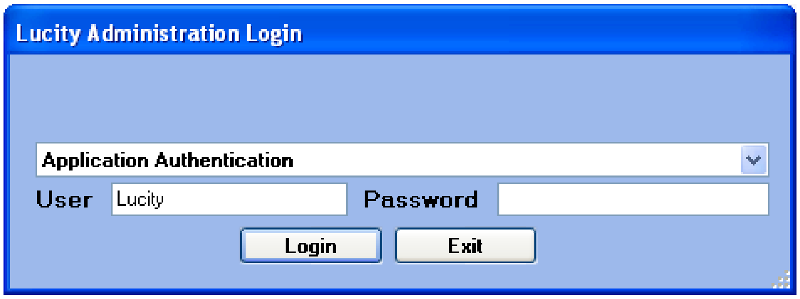
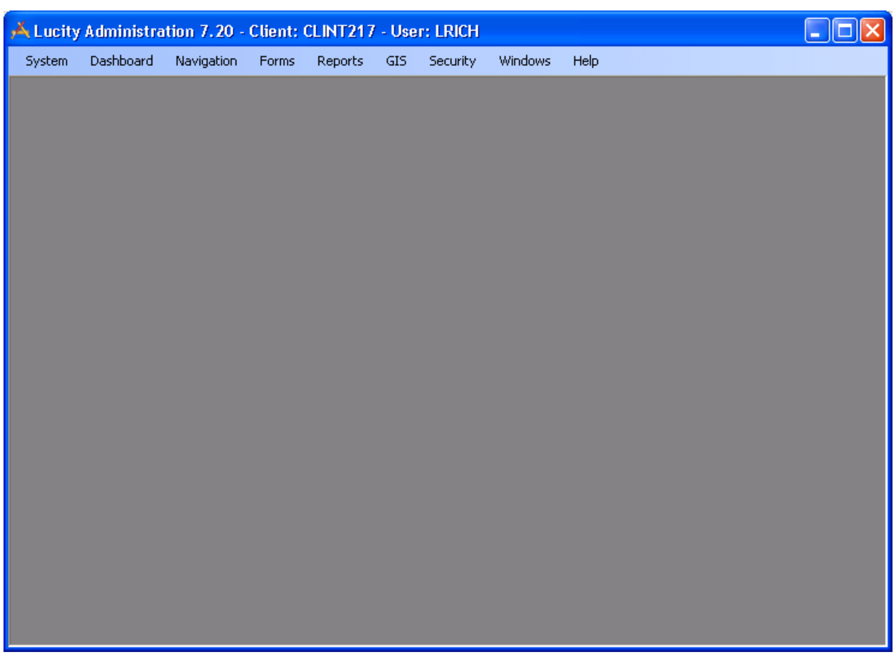
Administrative User Interface

The Lucity Admin UI allows you to create custom forms and grids, import pre-configured views, forms, and grids, and assign forms to menus so that they are available to users on the web. To begin using this program, you'll need to login with your Lucity username and password.



After logging in, you'll see the User Interface Administration screen and main menu. These menu options contain the following:

- System – Settings, Connection Strings, Manage Web and Public Web Caches, Object Lock Manager, User License Manager, Active User Manager
- Dashboard – Dashboard Setup (Dashboard Manager)
- Navigation – Menus
- Forms – Form Manager, Grid Manager
- Reports – Report Manager
- GIS – Connection Strings, Map Services, Map Setup
- Security – Assign Groups to Forms
- Windows – (standard Windows options: Tile, Cascade)
- Help – About, Help Topics



Creating Custom Forms

The Lucity Web application is composed of fully customizable Views, Forms, and Grids. Brief descriptions of these components are listed below:

- **Views** dictate the overall structure of the online screens. A View displays data in Grid format. You can have a parent grid as well as child grids (these are like the parent modules and child records in the Lucity Desktop application).
- **Grids** are individual components within the Views. They allow you to create parent and child grids. For example, there may be parent Request grids that contain child grids such as Requesters, Comments, or Tracking information. There may also be parent Work Order grids that contain child Resources, Tasks, and Tracking information. Fleet and Equipment 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 grid format. Forms are launched in a separate browser window. These forms must be tied to a Grid unless they are used alone as Request Submittal forms.

While the web system is designed to be fully customizable, we realize that the easiest way to start using forms on your website is to begin with our pre-configured views, forms, and grids. We've developed a number of these to aid you in setting up the web. These pre-configured files are found in the Lucity Install Media > Import Forms folder.

You can import these and then customize them to suit your organization's needs. If desired you can import these multiple times and reconfigure them differently each time. You'll use the Form and Grid Managers to begin creating custom forms. These tools are described in the following pages.

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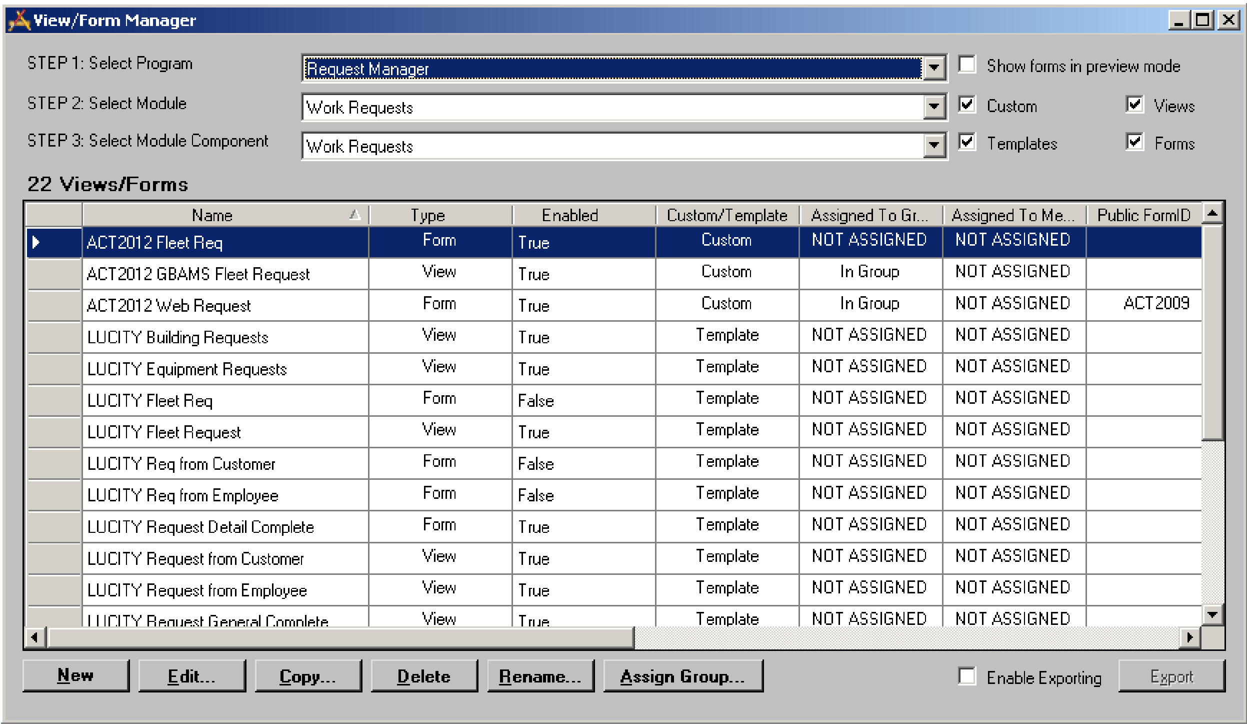
Simple View with Grid

Let's start to create a custom view with one grid. For this example, we will use sanitary sewer structures and show just Structure Number, Address information, structure type and structure depth.

From the Main Menu, select Forms, View/Form Manager. You might then get a form that looks something like this:



Lucity prompts you to follow the steps:

- **Step 1:** Select Program (showing Request Manager). The options in this dropdown match the Lucity products that you can purchase (and that are available to use in the grid). In the case, select Sewer.
- **Step 2:** Select Module (showing Work Requests). Each product has several modules that can be launched from within the product. In this case select Structure Inventory.

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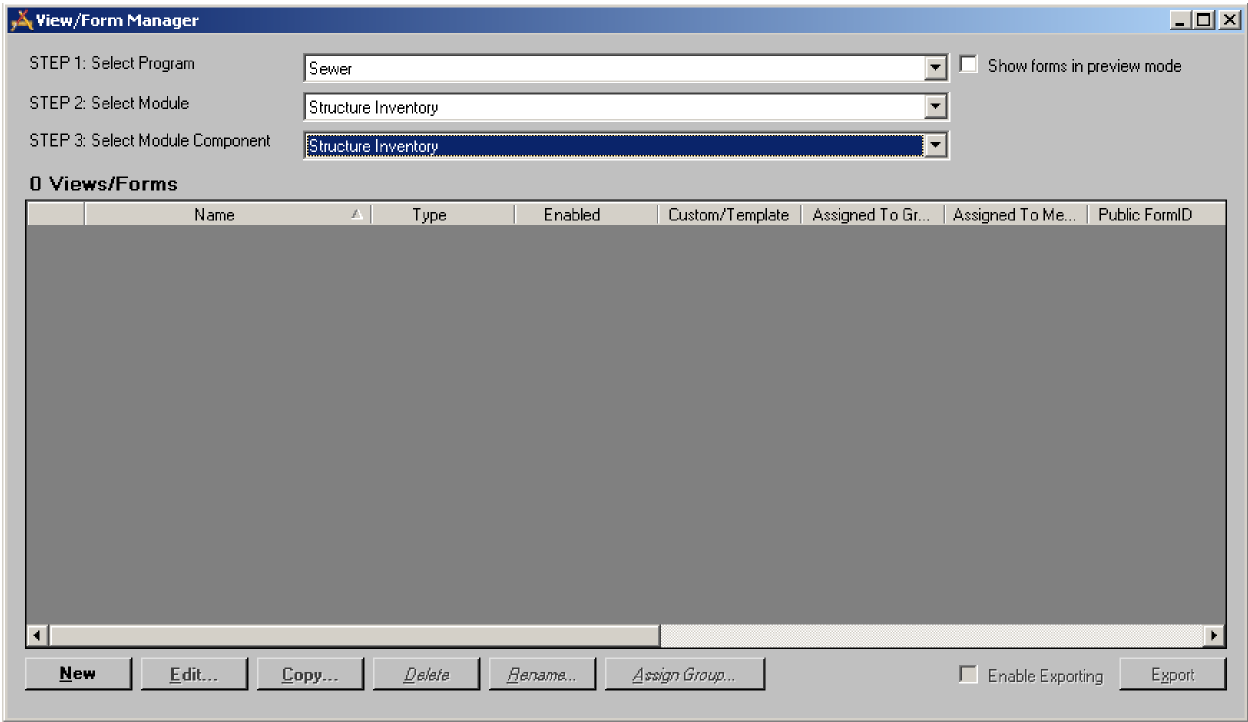
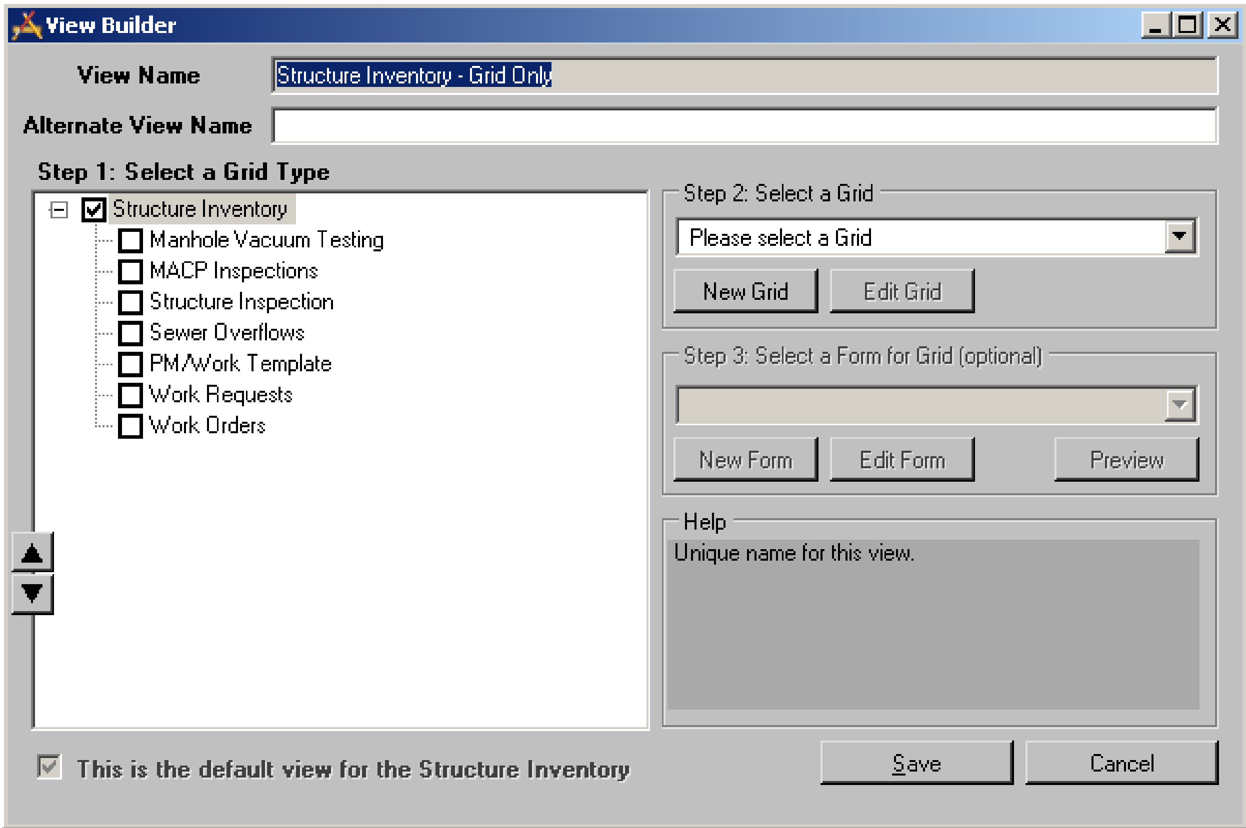
- **Step 3:** Select Module Component (showing Work Requests). There can be many components to a module. The inventory record itself, all children records including inspection records, all grandchildren records, etc. In this case, select Structure Inventory.



You will notice that there are no views or forms available yet for this module component.

Let create a new view first. Hit the new button in the lower left. The Enter information box will pop up. Each View and Form will need a unique name. Once this information is entered, hit OK.

The next page shows the View Builder dialog that then appears.



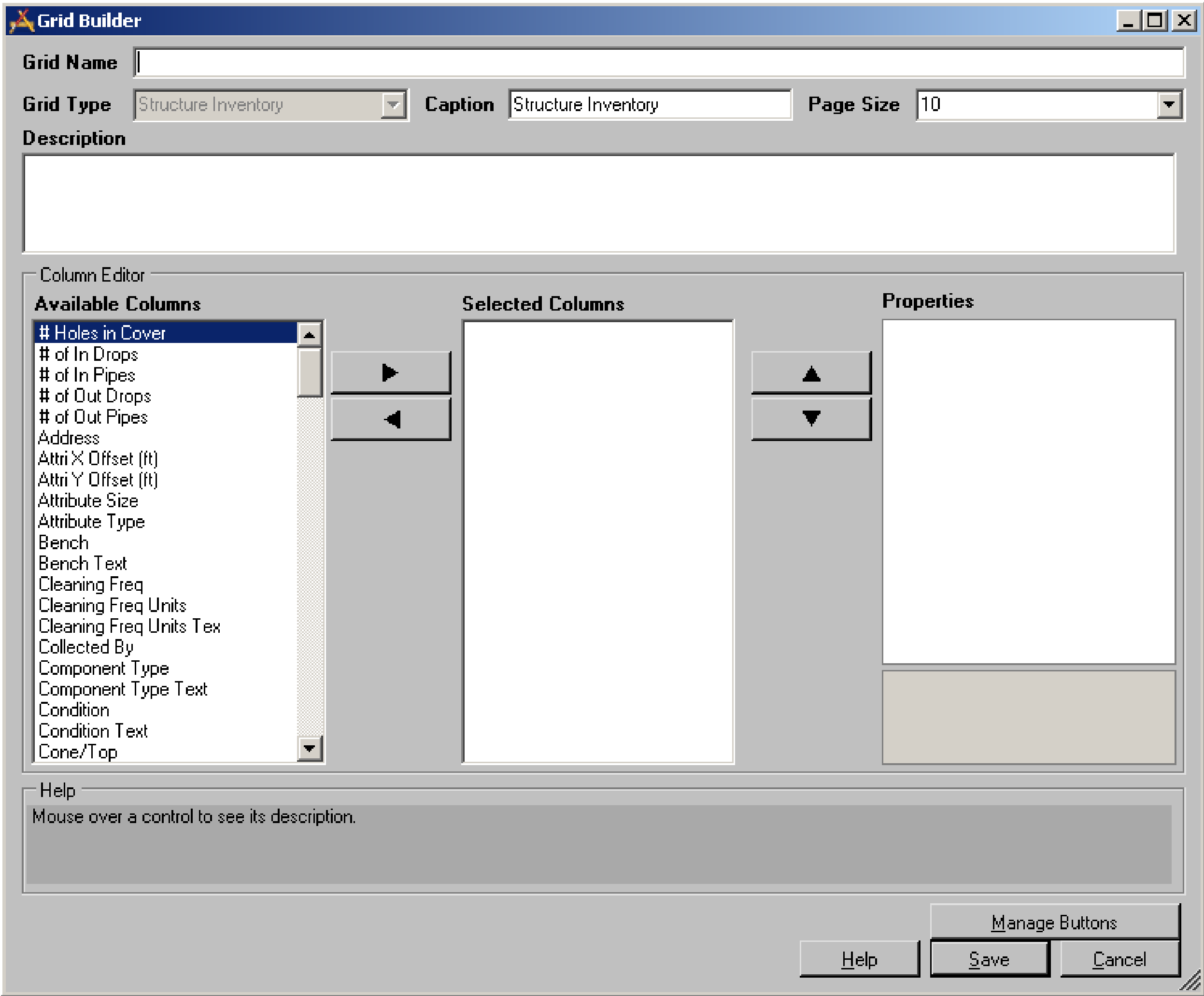
The View Builder helps step you through the process of creating a View. As stated earlier, a view is any combination of grids and forms.

An Alternate View Name can be entered, if desired. That would be the name that the users will see. In our case we will call this Sewer Structure Inventory

- **Step 1:** allows you to select all of the component types that you want the users to access while in the view. In our case, we want to make it very simple so we are going to leave all of the checkboxes blank except for Structure Inventory.
- **Step 2:** asks us to select a grid to match the grid type. A grid must be selected. However, in our case, we have not created a grid yet so we will need to select the New Grid button. We will do this in just a moment.
- **Step 3:** asks to select the Form for the Grid. This is optional. We do not want a Form for this example so we will leave this blank.

Notice that at the lower left hand corner there is a read-only checkbox that is checked stating that this is the default view for the Structure Inventory. This box is read-only when there is only one view defined for the object. This is important because whenever Lucity is not explicitly notified which View to open; it always opens this default view.

So now let's hit the New Grid button:



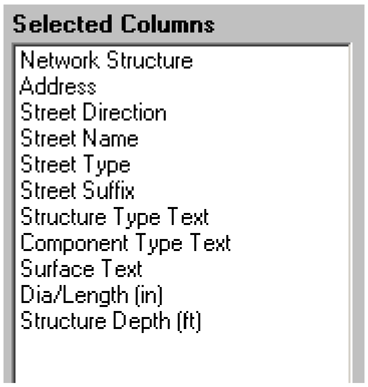
The above scary looking dialog is actually pretty simple to use. First, give it a Grid Name (use Sewer Structure Inventory – Simple). The user does not see this name so you should use something that helps you while you are selecting it from among a greater list.

Caption is something that the user sees. Typically that will always be the same as the Component Name but you could modify it if you wish. Let's leave it alone as that is probably what you would do most of the time.

Page Size determines how many rows of data the user is allowed to see at a time. We have included standard dropdowns of 10, 20, 30, 40 and 50. However, you can type any number that you wish. Remember that screen space can sometimes be at a premium and that the more records that are included in each page, the longer it may take to pull the information from the database and get it displayed. For now, let's change this to 20.

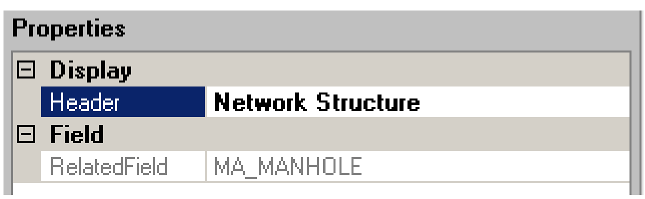
The **Description** you can leave blank unless you wanted to give yourself a longer description as to documentation for the grid development.

Now we want to select the fields (columns) that you want to display from the column editor. The names displayed are the caption names that appear in the Desktop. If you have never used the desktop, they are the field caption names that Lucity provided. These are sorted in alphabetical order. So let's add the fields listed below by finding them in the left hand column and using the arrow key to move it to the middle section.

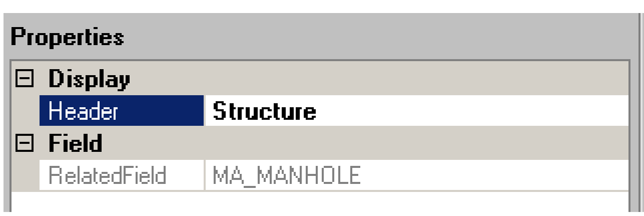


If you accidently moved a column that you did not want, you can highlight it and move it back to the Available Columns by using the right arrow. You can also move the fields up and down in the list by using the arrows to the right of the Selected Columns.

It is pretty likely that you will want to change the name of the column name. This can easily be done. Simply highlight a selected column field – I will use Network Structure as an example

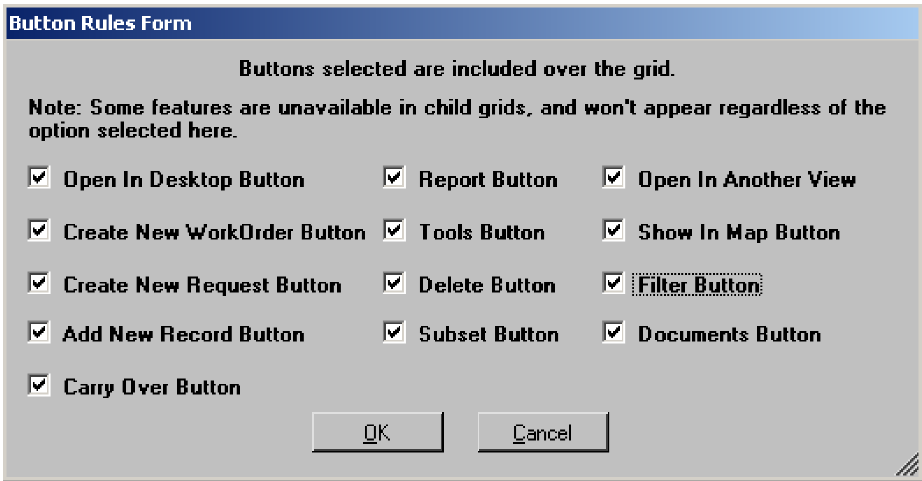


In the Properties dialog, you can then change Network Structure to Structure (or whatever you want).



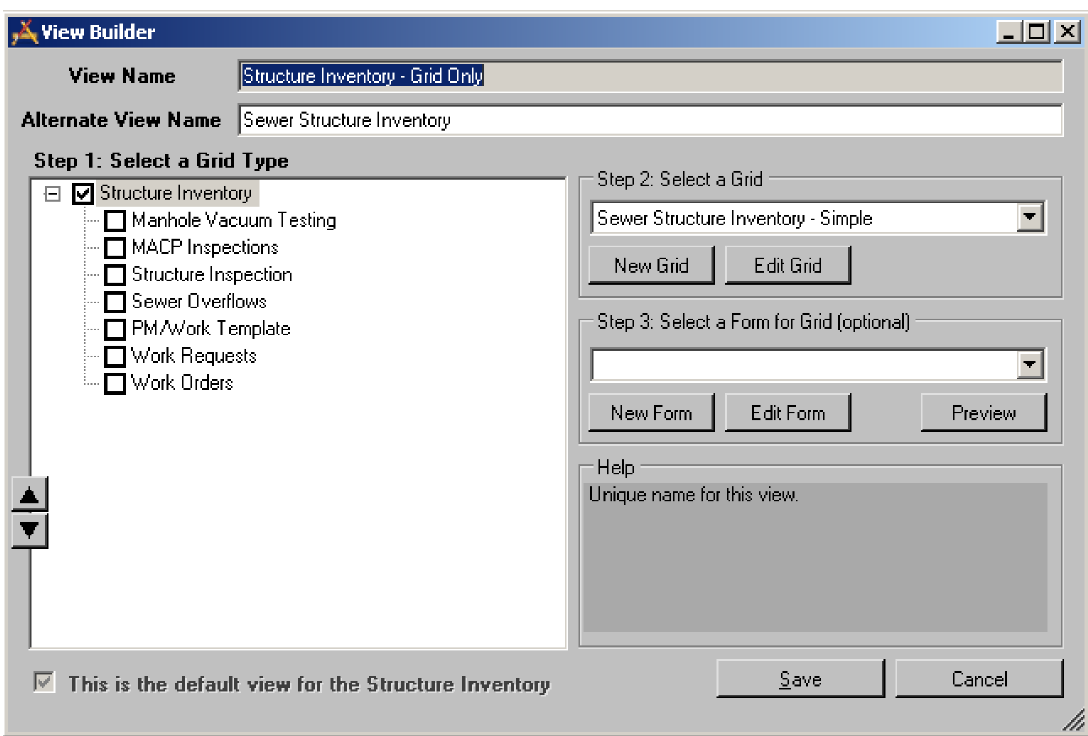
It appears that we changed almost every one of the columns. It took less than a minute. You will see the new names when the grid appears later.

Now you are ready to Manage Buttons so hit the button so labeled right over the Save button!



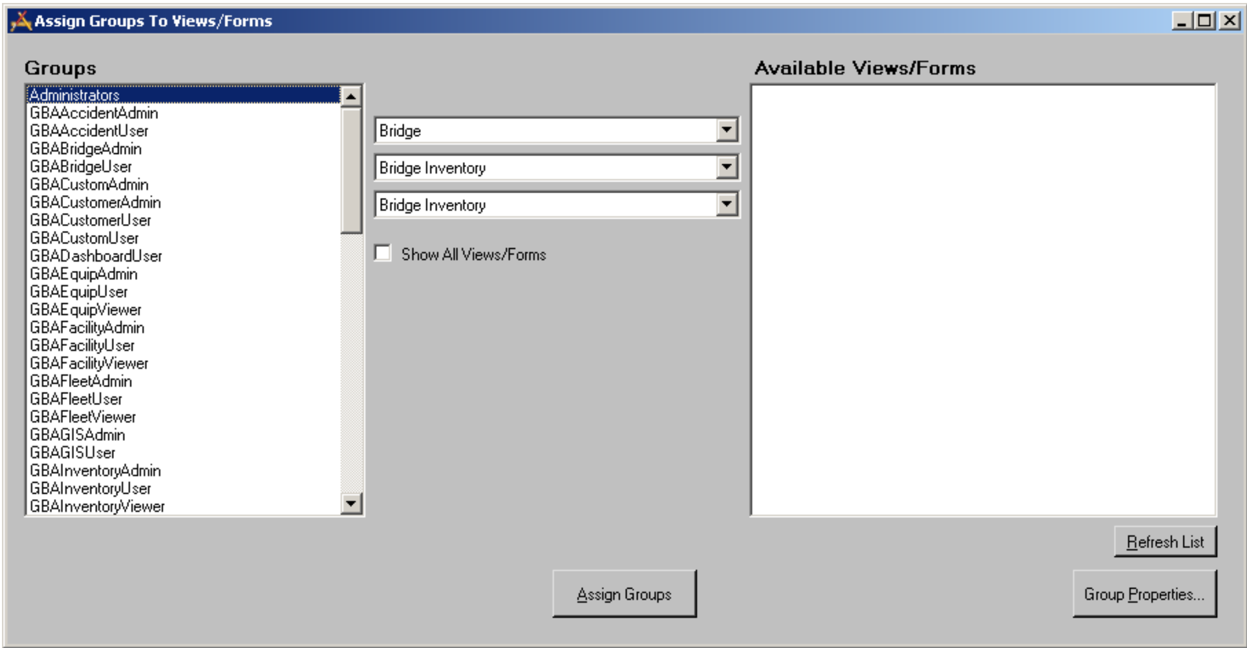
You really do not need to hit the button. However, this allows you to change any of the normal defaults so that you can limit what a user, or a group of users, can do. These settings and the security settings work in concert. Therefore, if you leave the Add New Record Button on the form but the user (or group of users) do not have rights to add a new record, then they would not be able to add a new record anyway. Since we are not attaching any Forms to this grid, we could go ahead and turn off the Add New Record Button and the Carry Over Button since those are two buttons that work with the form. When you are finished making changes to the checkboxes, then hit OK (or cancel).

Now hit Save. The program takes you back to the View Builder.

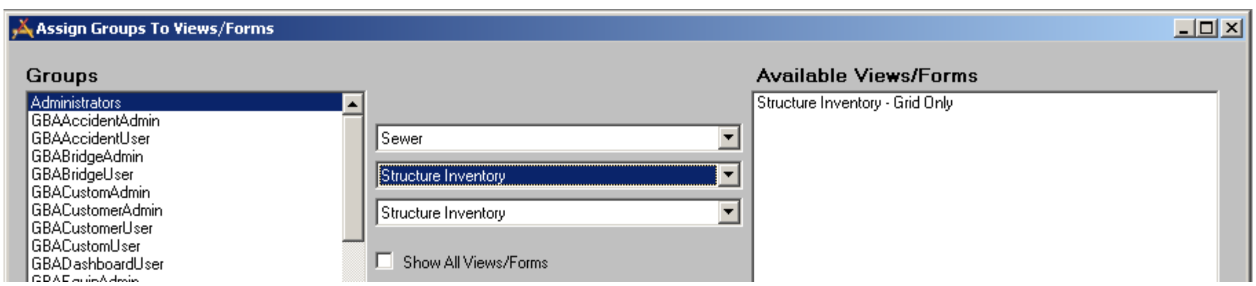


Hit the Save button. Congratulations – you have created your first view! Now we have to give users rights to view it.

From the Main Menu, Select Security > Assign Groups to Forms.

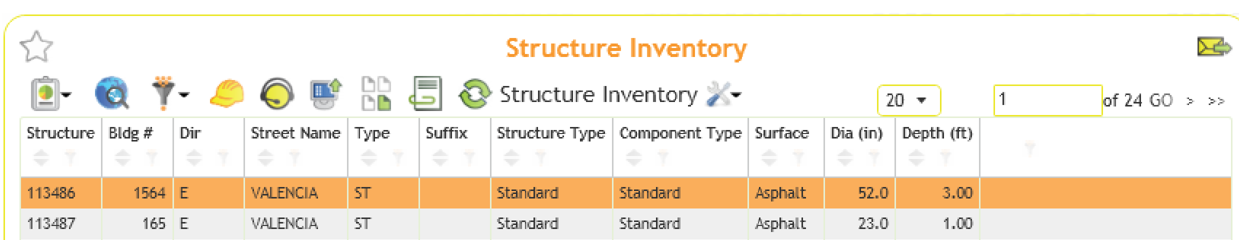


The left column shows all of the groups that have been assigned. On the right shows all of the views/forms available. Since the Show All Views/Forms is not checked, then only the forms that are for the component (Bridge Inventory in this example) appears. Let's change that to Structure Inventory.



Now, you can highlight one or more Groups, highlight the Structure Inventory – Grid Only View and then hit the Assign Groups button to allow those groups the rights to view the Form. Let's select the Groups Administrators and GBASewerViewer as the groups and go ahead and assign it.

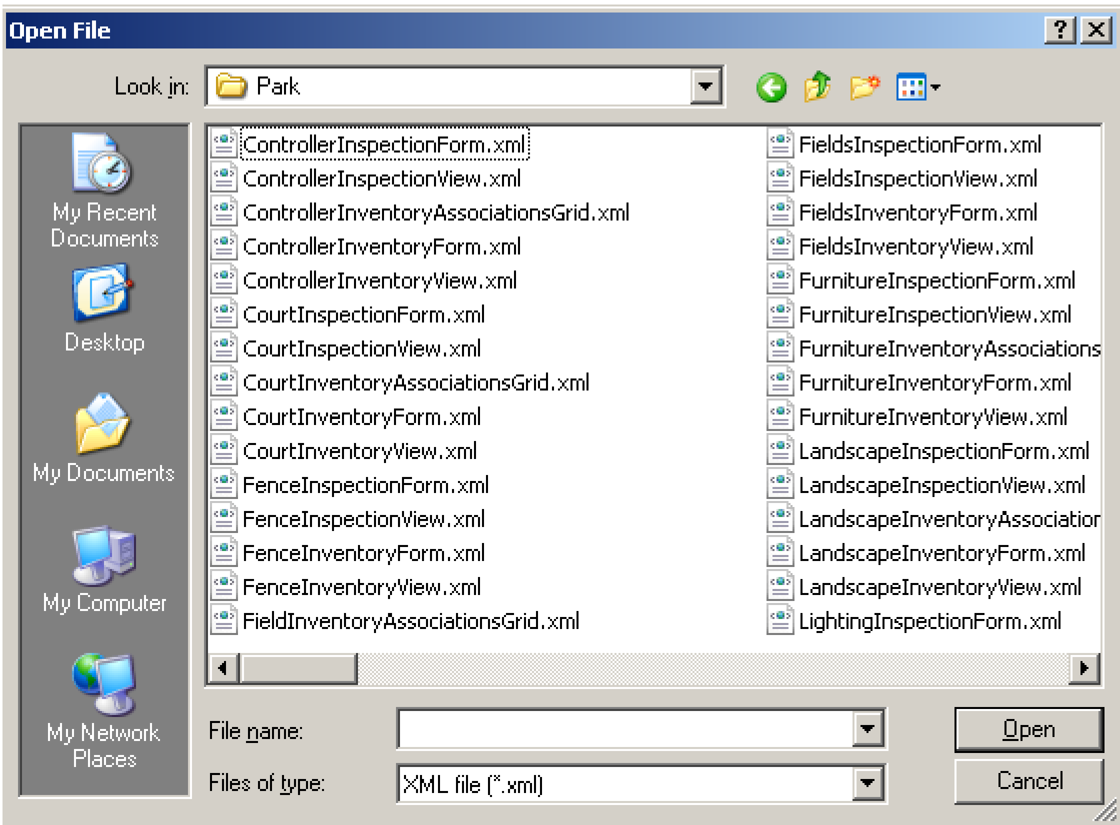
Here is what the form looks like in the web app.



Importing Views/Forms/Grids

While creating one grid is pretty simple, it may take a long time to create each one exactly the way that you want it. An alternative is to use some forms that Lucity has previously created for you. These forms/views typically have all fields displayed but in a logical (at least for us) sequence. As an example, let's import a Park Court view.

From the main menu, select Forms > Import from XML.



All of the views and forms that we have previously created and exported is available in a directory by product type. Let's select CourtInventoryView. Select it and hit open.

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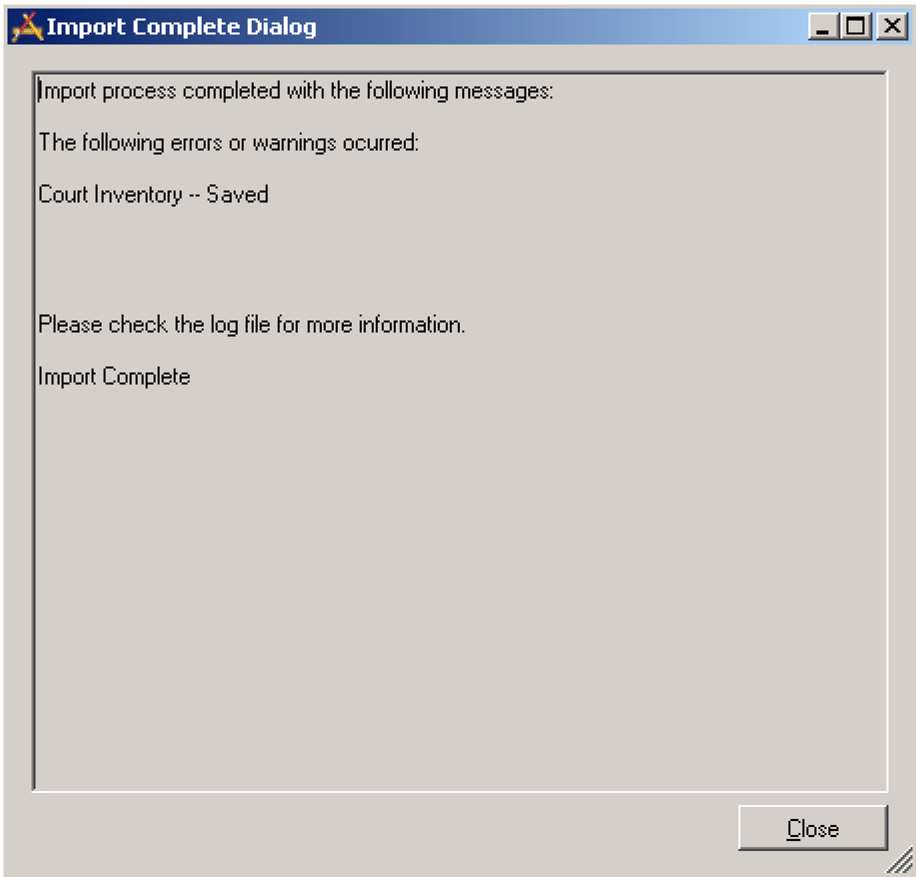
You will get the following dialog:



There were no errors in the import program and this dialog tells you that the Import is Complete. Hit the Close button.

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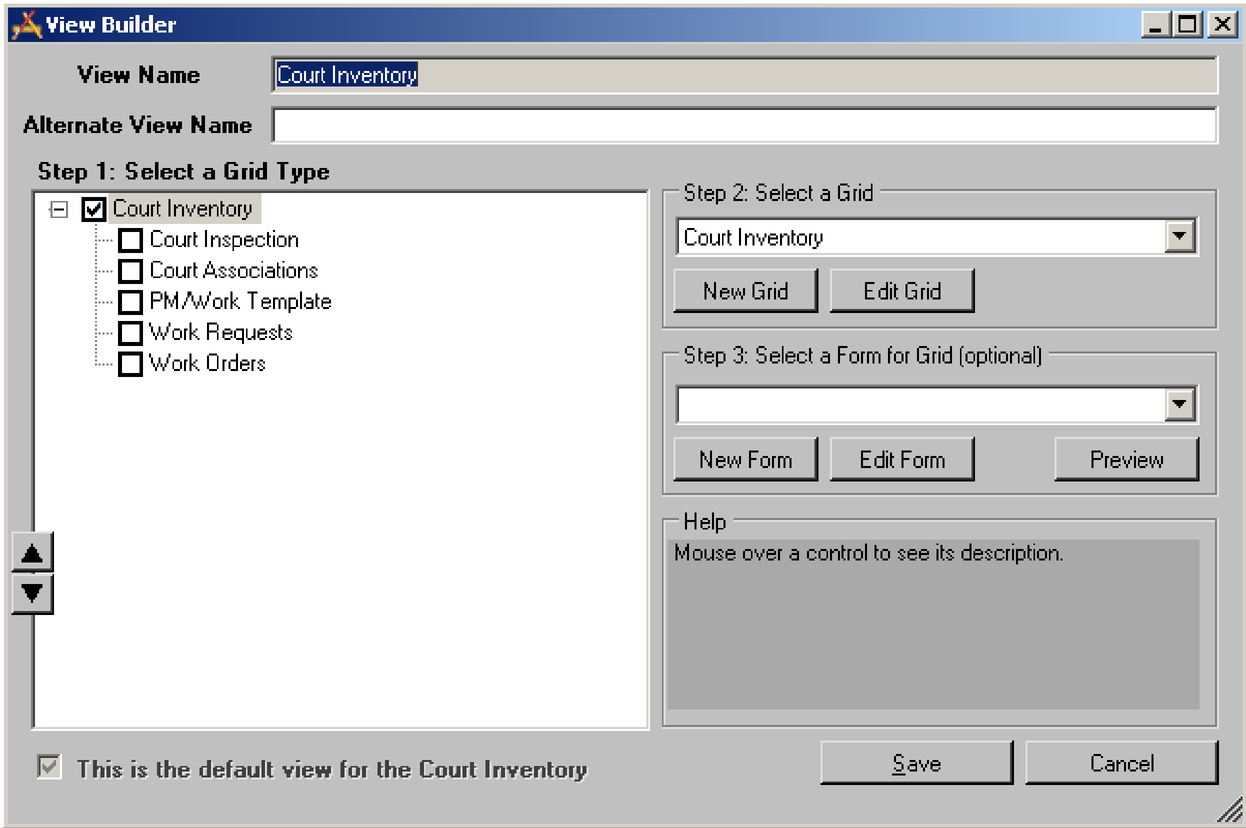
Now, let's open the view. From the Main menu, select Forms, View/Form Manager. Switch the Program to Parks, Module to Court Inventory (the module component always defaults to the parent component). You will notice that there is one view now called Court Inventory. Go ahead and hit edit.



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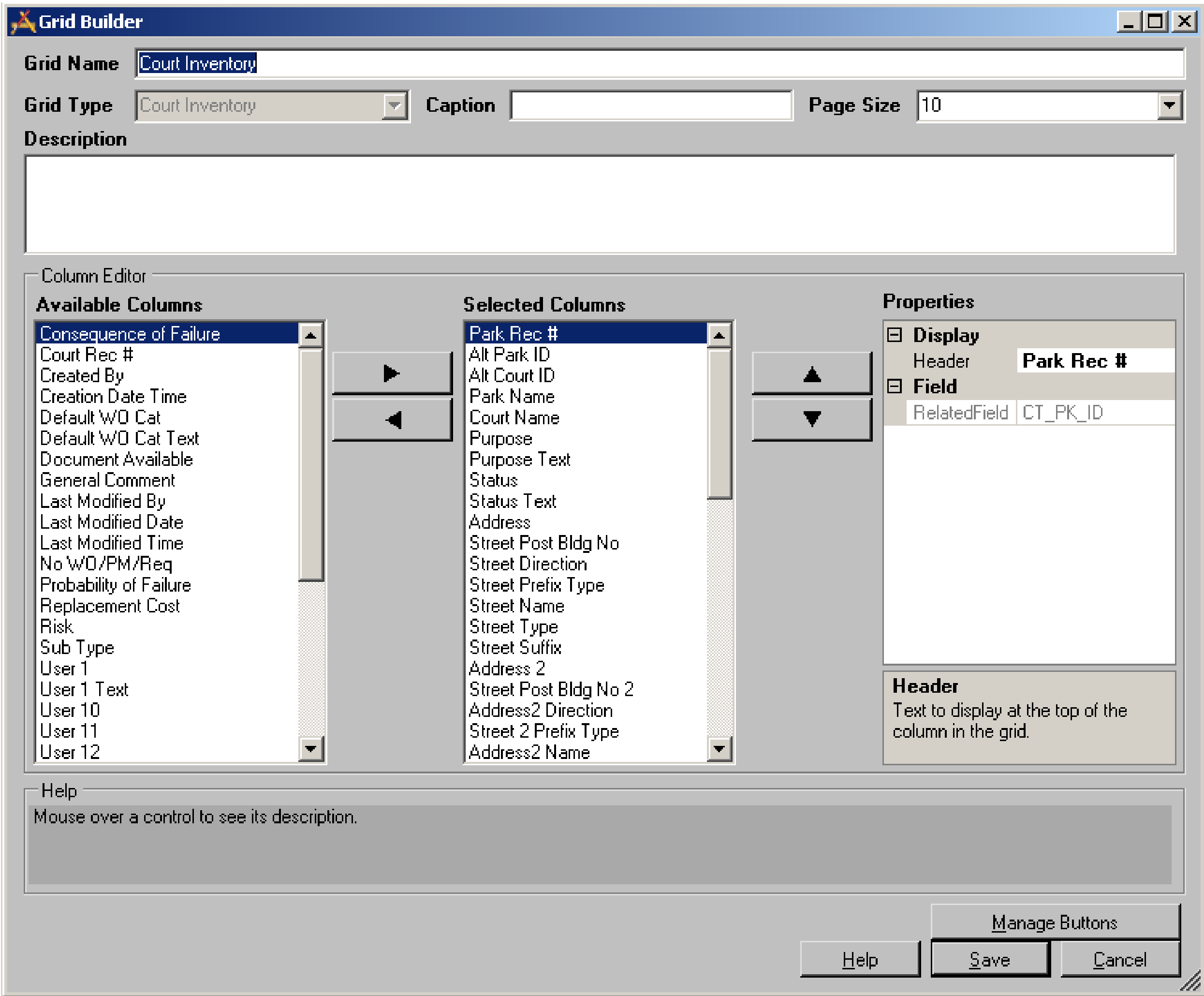
Now hit the Edit Grid button to take a look at what was imported.



You can see that many of the fields have been placed in the Selected Columns. Now, it is simply a matter of moving fields into or out of the Selected Column and changing their properties (the names of each column) if you wish and modifying the grid buttons.

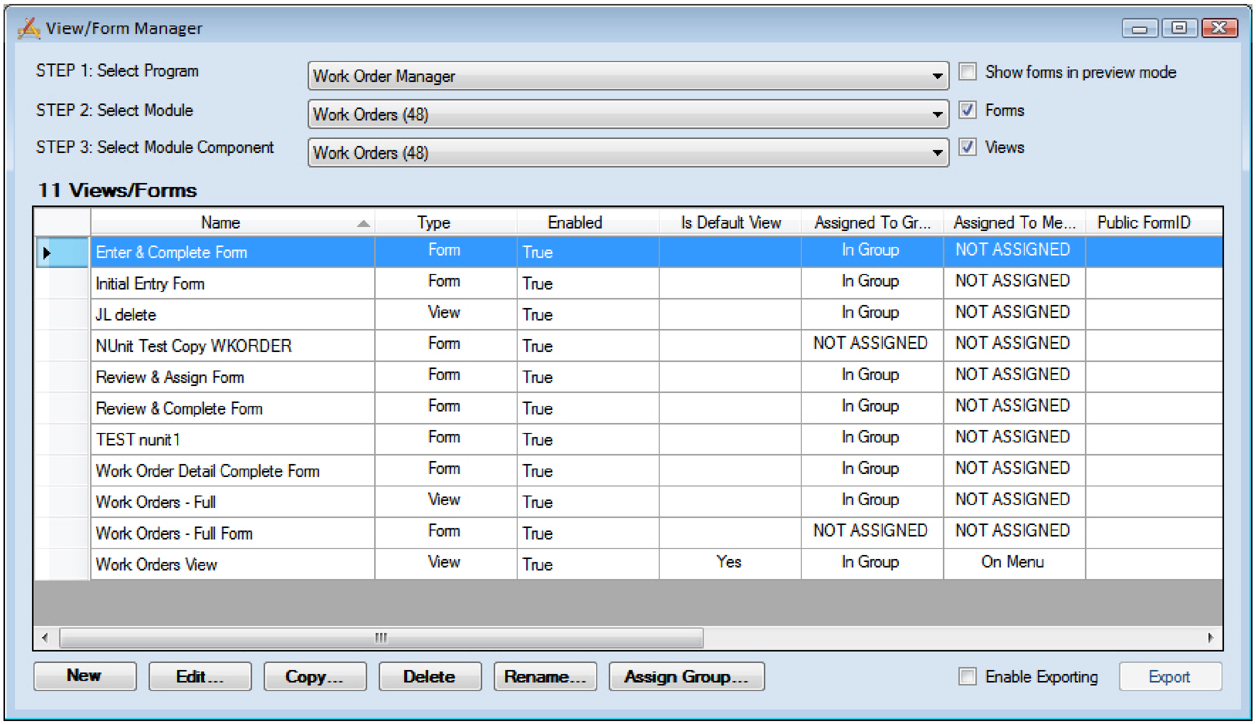
If you wish the view to have forms, then you can import those as well. Go back and Select the Import from XML menu item. Now choose CourtInventoryForm.xml and hit Open. Once it has been successfully imported, reopen the Park Court Inventory View/Form Manager. You will now notice the Court Inventory Form in the list of views/forms. Go ahead and select it and hit Edit.

A preview of the Form appears and shows how the imported form will basically look to the user. These are detailed forms mostly, meaning that they show every field that Lucity stores regarding the item. In this case they show Court Inventory. Later, we will be going over how to edit/modify the form. For now, let's except it as is. So let's close the form by hitting the X in the upper right hand corner or Form, Close from the menu.

Now open the Court Inventory View and attach the form to the view and hit save. We will go over editing the form in a later section.

View/Form Manager

Previously, we have discussed how to build a view from scratch and how to import a previously created View and Form. To continue you need to modify the views, grids, and forms you imported and modify them to meet your needs. This is partly done in the View/Form manager.

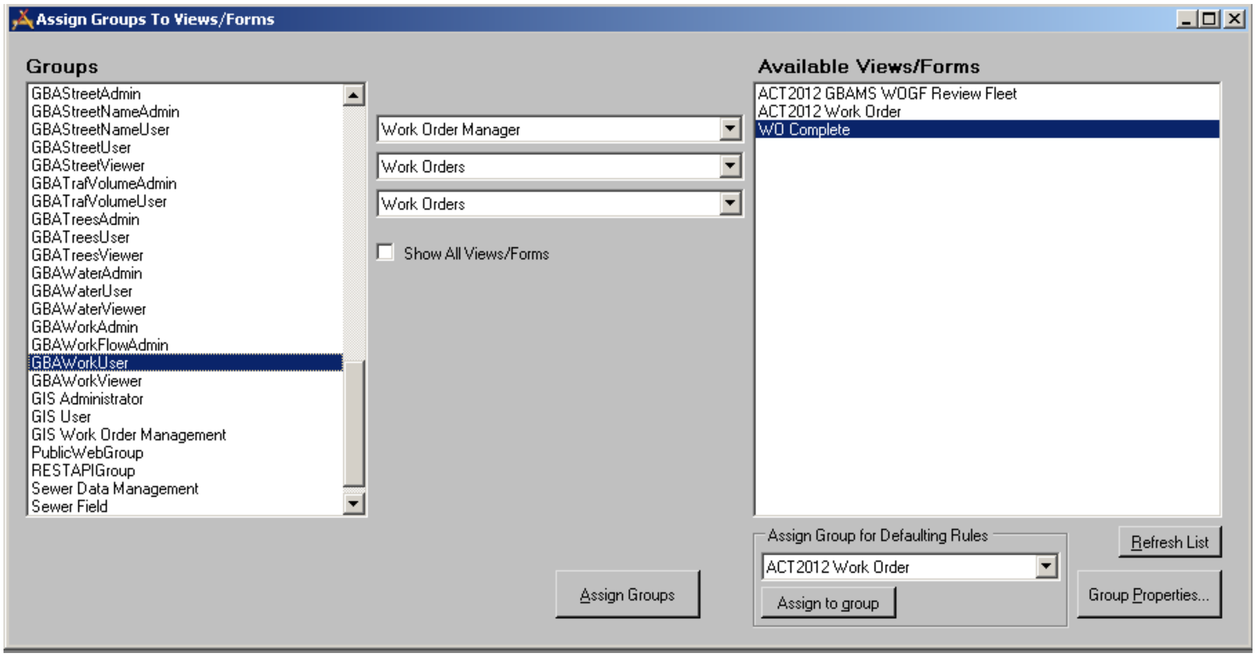


1. To use the View/Form Manager, select a Program from the first drop-down menu.
2. Then, select a module from the second drop-down menu. Available selections will change depending on which program was chosen in the previous step.
3. Next, select a module component from the third drop-down menu. This selection dictates the types of views and forms you'll be able to create. The available components are determined by the module you selected in step 2.
4. The views and forms displayed in the table will change depending on the selections you made in the drop-down lists. In the example above only Work Order Module views and forms are displayed. Had we made other selections, different types of views and forms would be displayed. The columns in the table contain the following identification information:
   - The Name and Type (View or Form).
   - An indication that the form has been enabled. Only forms that have been enabled can be assigned to menus.
   - An indication whether the item has been Assigned to Groups and Assigned to Menus. (We'll discuss how to complete these steps later in this workbook).
   - The Public Form ID. This is used for Lucity Web Citizen forms.
   - The last modified by and last modified date information.
5. You can use the buttons below the table to add new forms/views, Edit existing forms/views, Copy existing forms/views, Delete existing forms/views, or Rename existing forms/views.

Assigning Groups to Forms

In order for views and forms to be used online, you'll need to assign groups to views and forms and then assign them to menus. The *Assign Groups to Forms* option in the UI Admin allows you to rapidly assign different user groups to various forms. These groups are established in the Lucity Security.exe. You'll need to assign users to groups in the Security program in order for them to access your custom forms.

1. Click on one or multiple groups on the left-hand side of the screen. Your selections will be highlighted.
   - For our example, select the "Default" group.
2. Click on one or multiple forms on the right-hand side of the screen. Your selections will be highlighted.
   - Select the forms you just copied, i.e. "WO Complete", "Request", "Employee Request", "Fleet" and "Equipment".
3. Click the *Assign Groups to Forms* button. All highlighted groups will be assigned to the highlighted forms.



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Menus

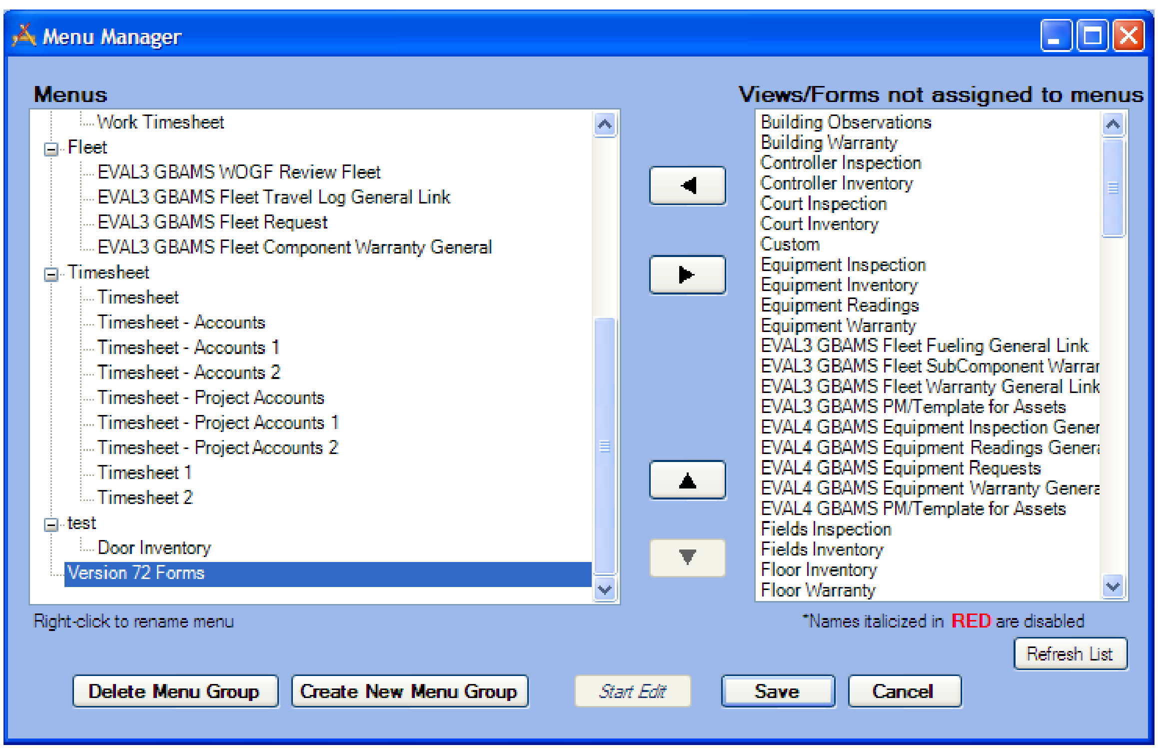
The Navigation *Menu* option allows you to define root menus for use on your internal website. You can then include your custom forms under each menu item. Since the menus are fully dynamic, you can define the names of the menu items, the order in which menu root items are displayed, and the order of forms within each menu group. For ease of use, we've provided arrows to move your menu items.

Note that users will only be able to see the menu items for which they have group permissions. Timesheet forms will also appear in this list.

Create New Menu Group

The menu groups appear on the left-hand side of the Menu Manager. To add a menu group listing, complete the steps below:

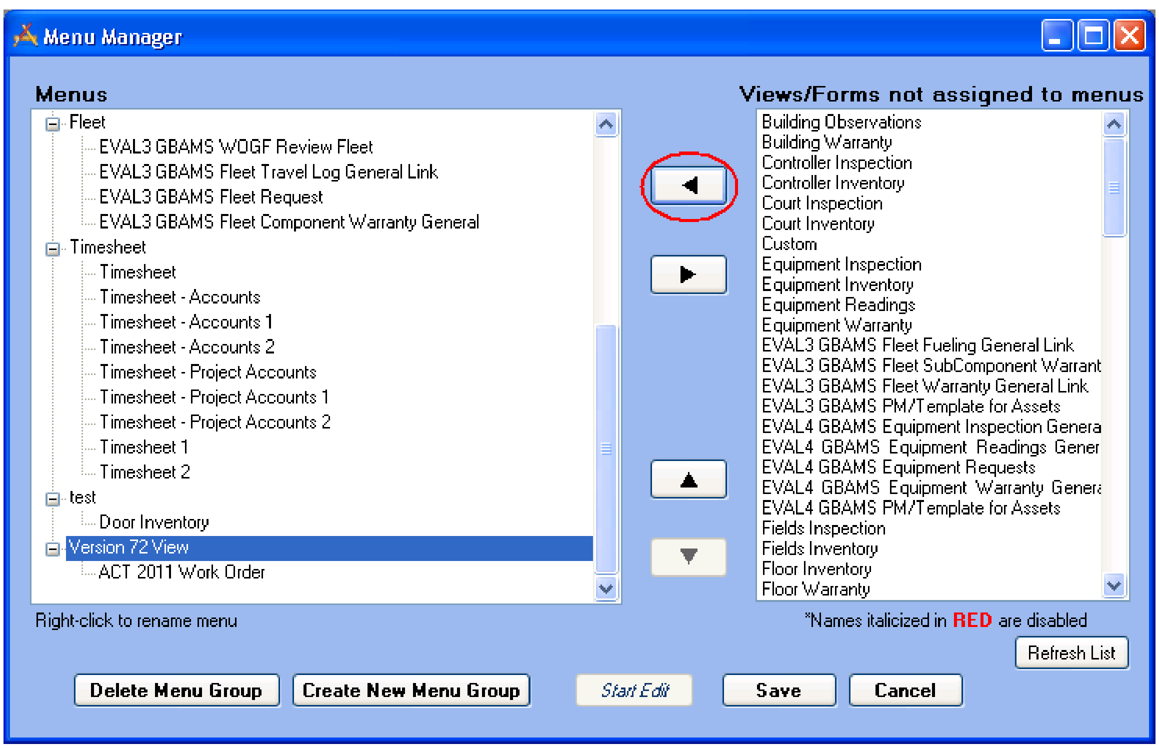
1. Click the *Start Edit* button.
2. Click the *Create New Menu Group* button at the bottom of the screen. A "New Group" listing will appear in the left-hand grid.
3. Right click on the "New Group" listing and type a new name. This name will appear on your website's menu.
    - o Here, we've created a new menu group called "Version 7.2 Forms".
4. Click *Save* when you are finished making your changes.



Assigning Forms to Menu Group

The forms appear on the right-hand side of the Menu Manager. Note that form names in red italics are disabled. In order to add forms to the menu, you must select the *Enable Forms* checkbox on Detailed Form Editor (the forms that you copied in the above examples will already be enabled).

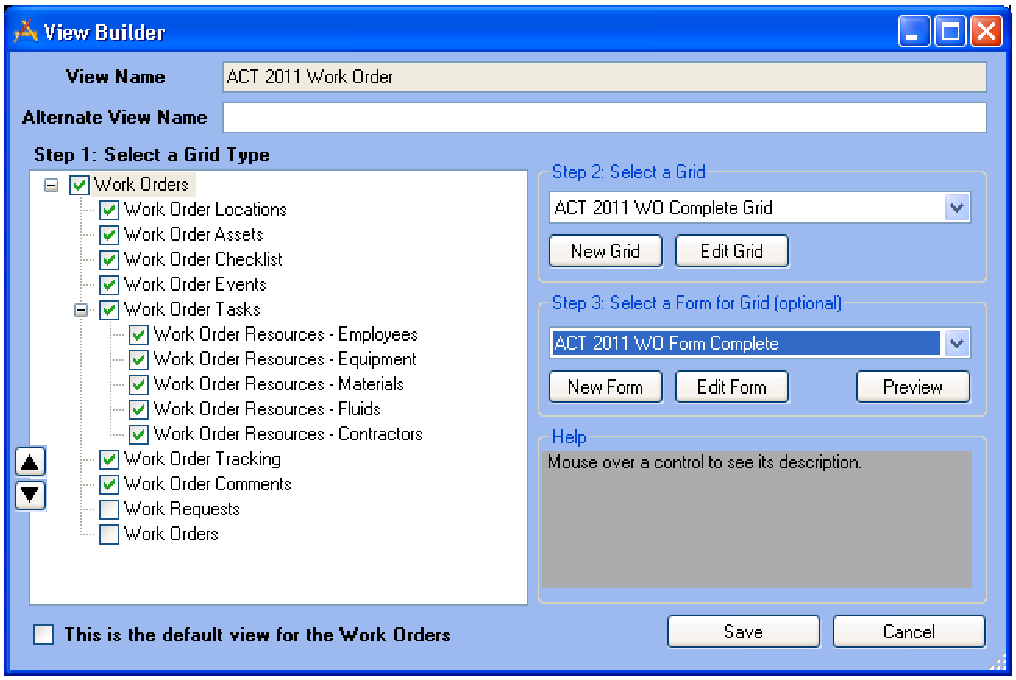
1. Click the *Start Edit* button.
2. First, highlight a menu group in the left-hand grid. Forms will be added to the highlighted menu group only.
    - We've highlighted the "Version 7 Forms" group.
3. Next, highlight a form in the right-hand grid and use the left arrow button to move the form to the selected menu group.
4. Repeat this process for all of the forms you'd like to add to the menu.
    - For this example, move the "Employee Request", "Equipment", "Fleet", "Request", and "WO Complete" forms under your new menu group.
5. Use the up and down arrows to rearrange the forms in the menu.
6. To remove a form from the menu, highlight it and click the right arrow button
7. Click *Save* when you are finished making your changes.



View Builder

Remember, Views are used to designate the overall structure of your online forms. A View displays data in grid format. You can have parent grids as well as child grids (these are like the parent modules and child records in the Lucity Desktop application). You will use the View Builder to indicate which Grids will appear in the Views, and then associate individual Forms with the Grids you select. Only previously defined Grids and Forms can be added to your Views. When you copy a View, all of the Grids and Forms contained therein will be copied as well. This allows you to quickly begin using forms on the web.

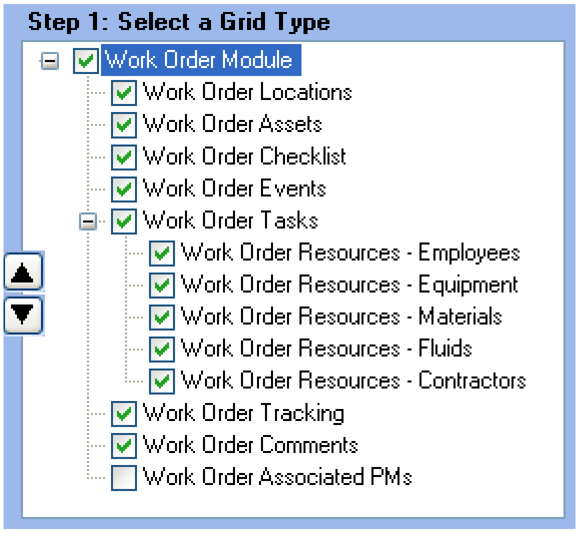
A sample of the View Builder appears below. This particular sample displays the “WO Complete” form. As you can see, it contains a number of Grids, each with Forms attached. These Grids and Forms each have the prefix we assigned earlier.



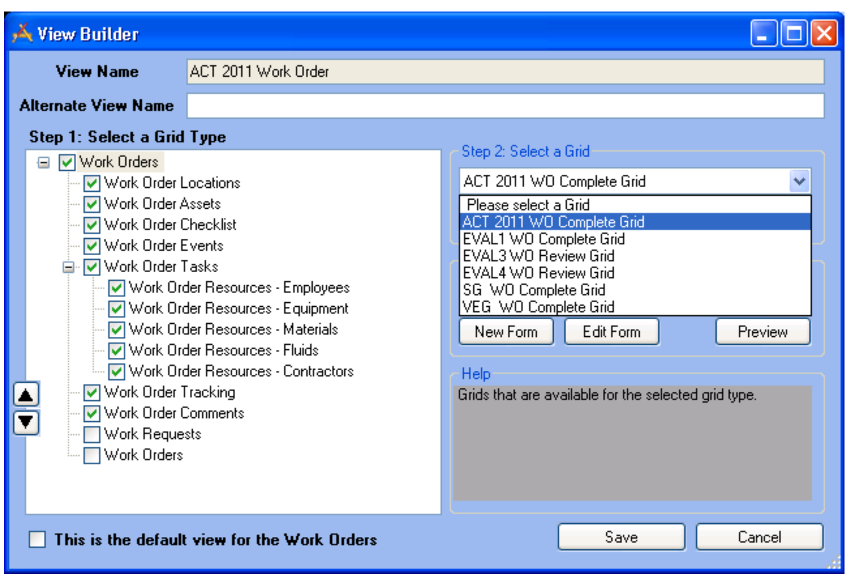
1. When you customize Views you can provide an alternate form name. This alternate name will be the one seen by end-users on the website.
2. You may also designate one “Default” View per module (i.e. one for Work Orders and one for Requests). The “Default” View will be opened when special tools are used on the web such as *Create Work Order from Request*.
   - To designate this example as the “Default” View for the Work Order module, simply mark the checkbox located at the bottom of the View Builder.

3. On the left-hand side of the dialog you can see a section titled “Step 1: Select a Grid Type”. This section lists all grid types available for this View. The list of available types is determined by the type of form you selected in the Form Manager.
   - Mark the checkboxes for each grid you would like to add to the View. This will create the overall structure of the web form.

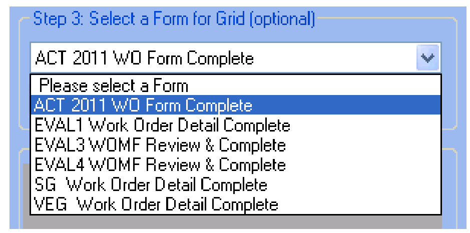
- In the example below, we have included a Work Order Module grid, as well as Work Order Locations, Work Order Assets, Work Order Checklist, Work Order Events, Work Order Tasks, Employee Resources, Equipment Resources, Material Resources, Fluid Resources, Contractor Resources, Work Order Tracking, and Work Order Comments grids.
- Use the up or down arrows to the left of this section to change the order in which the Grids will appear on the View.



4. After selecting the types of grids, you can choose specific custom grids to add to the View.
   - Highlight a Grid Type in the left-hand section (Step 1: Select a Grid Type).
   - From the drop-down list under "Step 2: Select a Grid", choose a pre-defined, custom grid to add to your View. The grids listed will change depending on the grid type highlighted.
   - Continue to add grids for each of the grid types marked in the first section.
   - If none of the grids in the list suit your needs, you can use the buttons below the list to create a new grid or edit an existing grid using the Grid Manager.

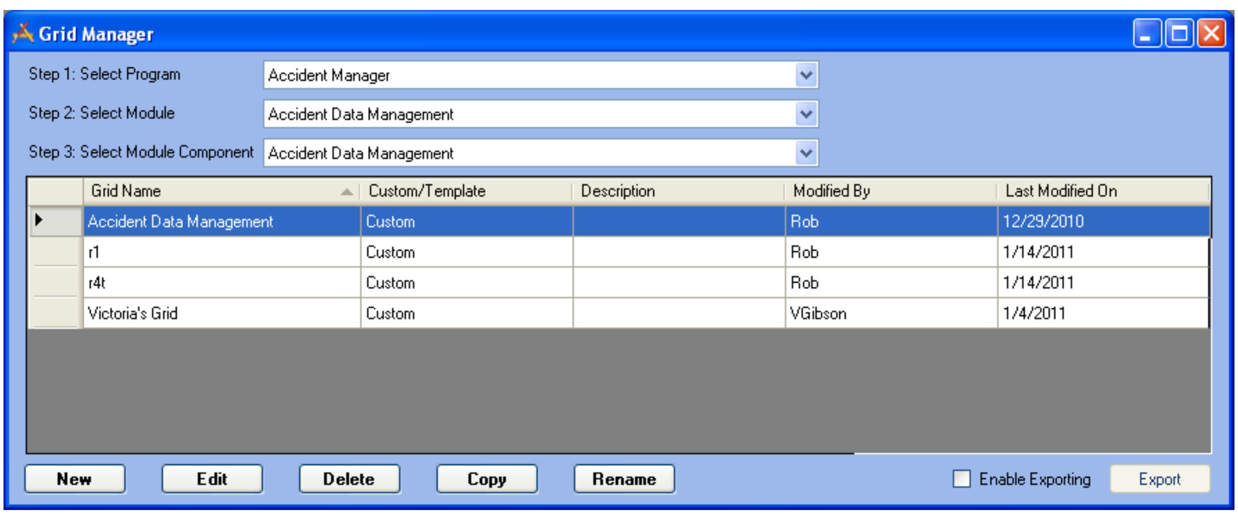


5. The final step in customizing Views is to add Forms to the selected Grids. In order for Forms to be edited on the web, they must be assigned to a Grid in this step.
    - o Highlight a Grid Type in the left-hand section (Step 1: Select a Grid Type).
    - o Choose a custom Grid (Step 2: Select a Grid).
    - o From the drop-down list under "Step 3: Select a Details Form for Grid", choose a pre-defined, custom Form to add to the Grid on your View. The forms listed will change depending on the grid type highlighted.
    - o To see the forms as they would appear online, highlight a form name and click the *Preview* button. The Control Preview window will open.
    - o If none of the forms in the list suit your needs, you can use the buttons below the list to create a new form or edit an existing form using the Detailed Form Editor.
    - o Continue adding Forms to each of the Grids.
    - o Save the View when you have completed this process.



Grid Manager

The Grid Manager allows you to customize imported grids or create custom grids and indicate what specifically will appear in each. As we just demonstrated, you can then associate Forms with the Grids you define using the View Builder.



1. To use the Grid Manager, select a program from the first drop-down menu.
2. Then, select a module from the second drop-down menu. Available selections will change depending on which program was selected in the previous step.
3. Next, select a module component from the third drop-down menu. This selection dictates the type of grids you'll be able to create. The available components are determined by the module you selected in the previous step.

4. The grids displayed in the table will change depending on the selections you made above. In our example, only Work Order Module grids are displayed. Had we made other selections, different types of grids would appear in the table. The columns in the table contain the following identification information:
    - The grid name and description.
    - The last modified by and last modified date information.
5. You can use the buttons below the table to add new grids, Edit existing grids, Copy existing grids, Delete existing grids, or Rename existing grids.
    - Note that the Grid Manager already contains several copies of Imported Grids. These were created when you copied Views earlier in this workbook. Copied Grids are easily identified by the prefix that you assigned.

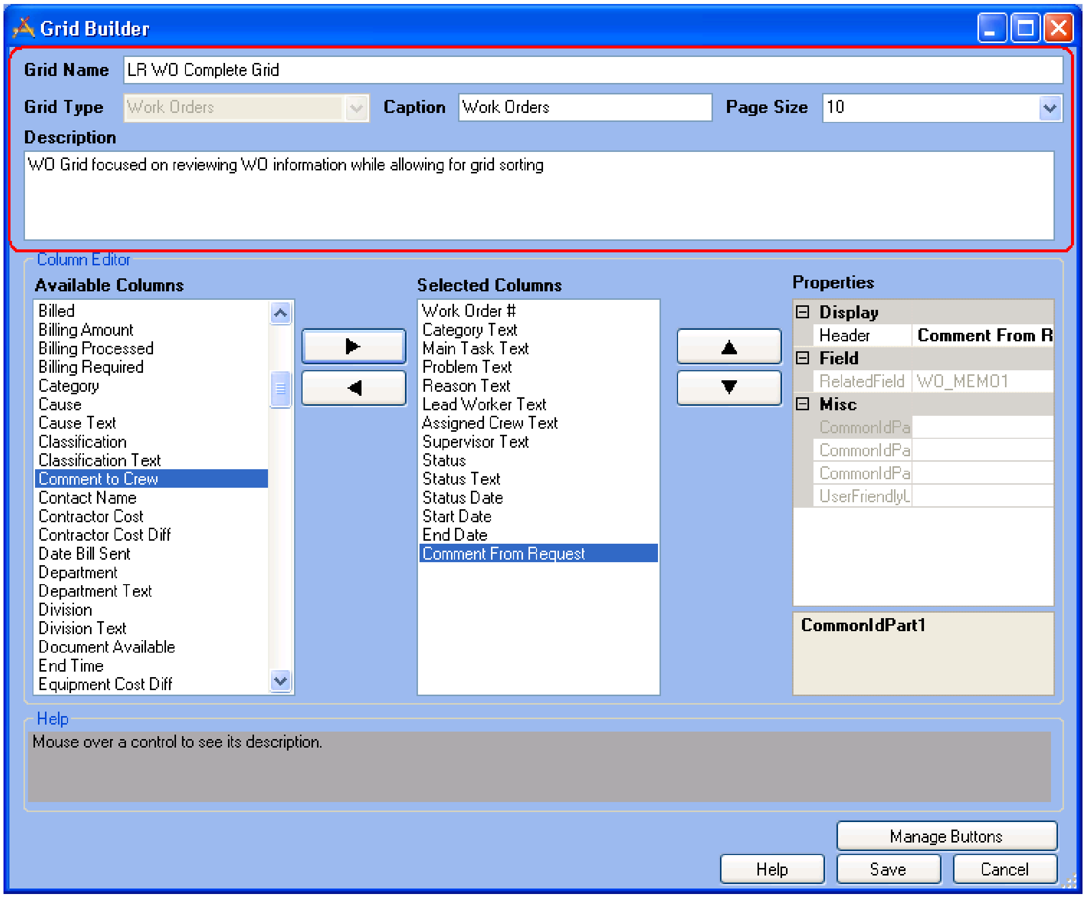
Defining General Grid Information

At the top of the Grid Builder you'll include general information about the grid:

1. The Grid Name field allows you to create a unique name for the grid. If the name is not unique, you'll receive an error when you attempt to save the grid. Be sure to create a recognizable name as you'll select grids from a list when creating Views.
2. The Grid Type is pre-determined by the selections you made in the Grid Manager. For example, the grid below is for the Work Order Module.
3. You can edit the grid Caption. By default, this field will contain the Grid Type. This will be displayed at the top of the grid on the website.
4. The Page Size field allows you to indicate the number of records that can be displayed on the web page. The maximum number allowed is 999, but we recommend you keep numbers low (around 10 records per page). For example, if you are creating a Work Order Module grid (like the one displayed below), you can indicate whether you'd like to have 5, 10, or 15 Work Order records displayed at a time on the website.
5. The Description field allows you to explain the purpose of the grid. This description will appear in the Grid Builder to help you identify the Grid in this record.

Notes:____

6. You can also control which toolbar buttons appear on screen along with each grid. Click on “Manage Buttons” button, and uncheck the checkbox for buttons you want to exclude from the grid.



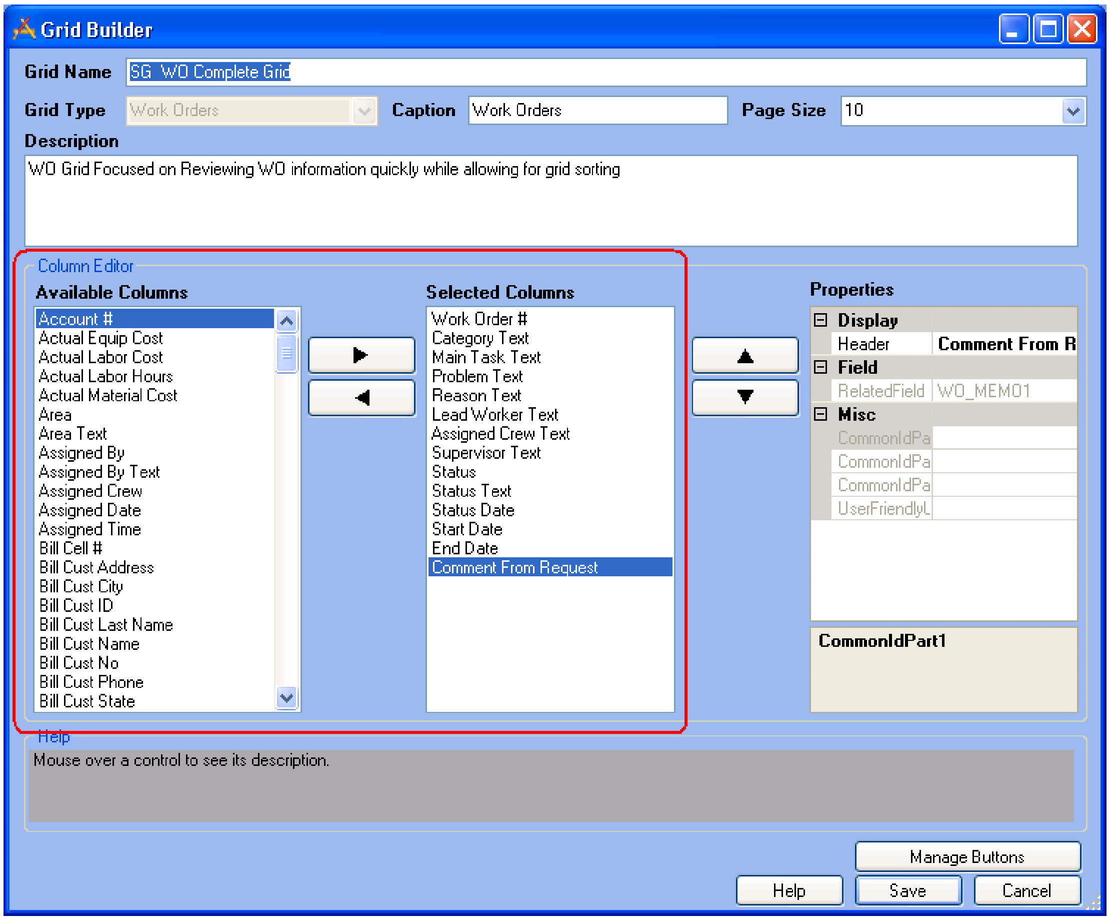
Adding Columns

On the left-hand side of the dialog you’ll see a list of the columns available for use in the grid. This list will change depending on the type of grid selected (i.e. Work Order Module, Work Resources, Fleet, etc.). Each column may only be added once per grid. Columns that have already been added to the grid appear in red text.

1. To add columns to the grid, double-click on a listing or highlight it and use the right arrow button alongside the list. The selected columns will appear in the center “Selected Columns” list.

2. To change the arrangement of the columns on the grid, use the up and down arrows beside the center list.

3. To remove columns from the grid, use the left arrow button.

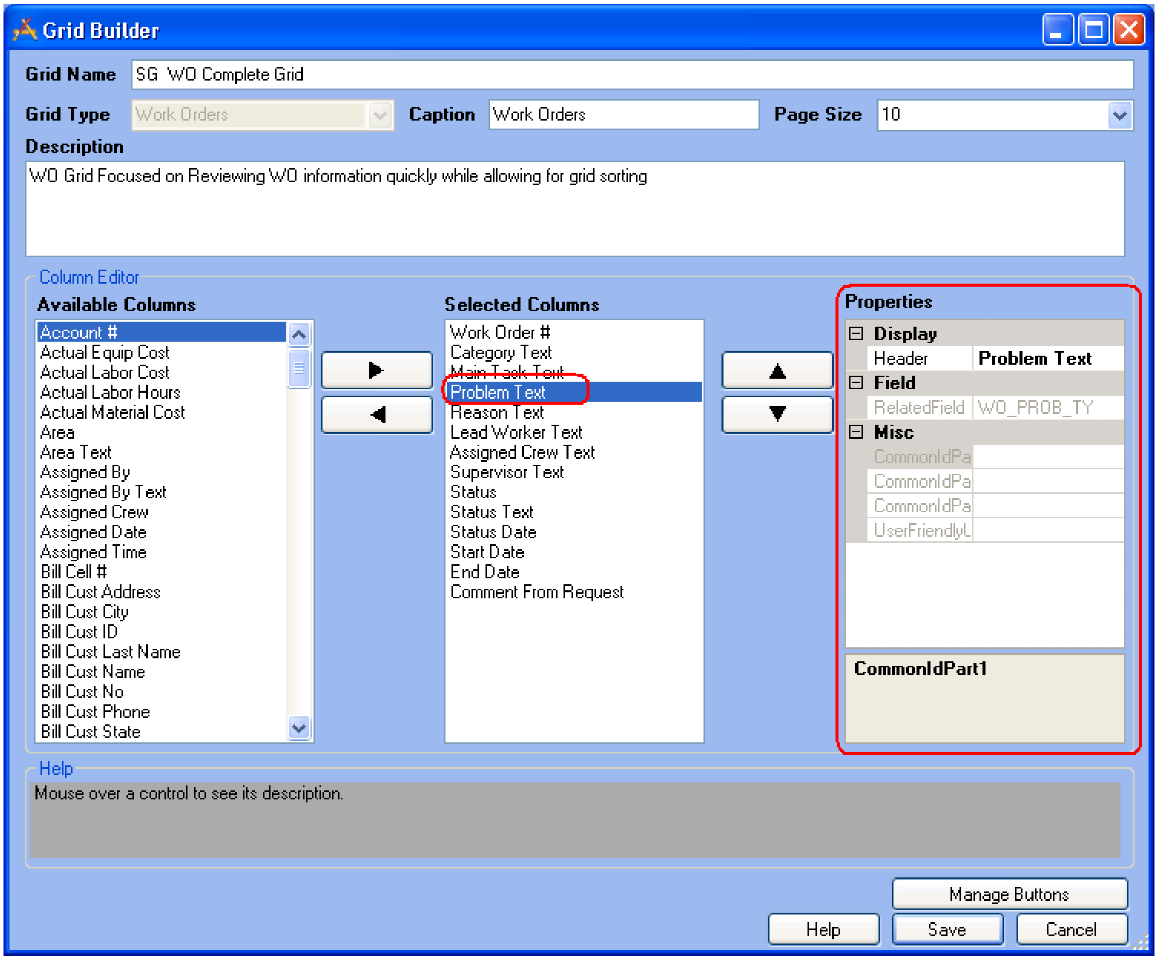


Selecting Column Properties

The properties dialog appears on the right-hand side of the screen. It allows you to set the properties for individual columns.

1. To make changes to a column's properties, simply click on a property in the right-hand dialog. The property name will be highlighted. The following properties are available:
   - **Header** – The text that will be displayed above the column in the grid.
   - **Width** – The width of the column in pixels. This is only used for Comment columns and will serve to limit the Comment text displayed in the grid.
   - **Related Field** – The field in the Lucity database to which the column is mapped. This is a read-only field.
2. Place your cursor in the field to the right of the property name. You can then type directly in that field.

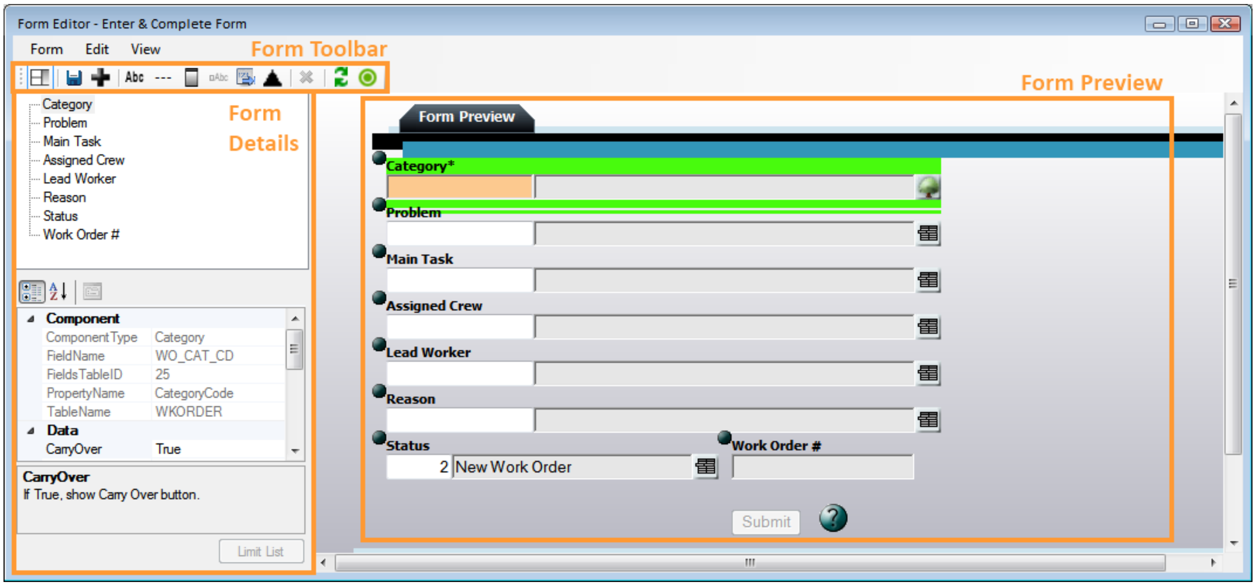
3. Save your changes.



Notes:____

Detailed Form Editor

As we mentioned earlier, Forms are used for adding new records, editing existing records, or viewing details about a single object. When you have imported a form you can then customize it as needed. A copy of the "Work Order Detail Complete" form appears below. This is the Form assigned to the Work Order Module Grid in the "WO Complete" View.



Form Preview

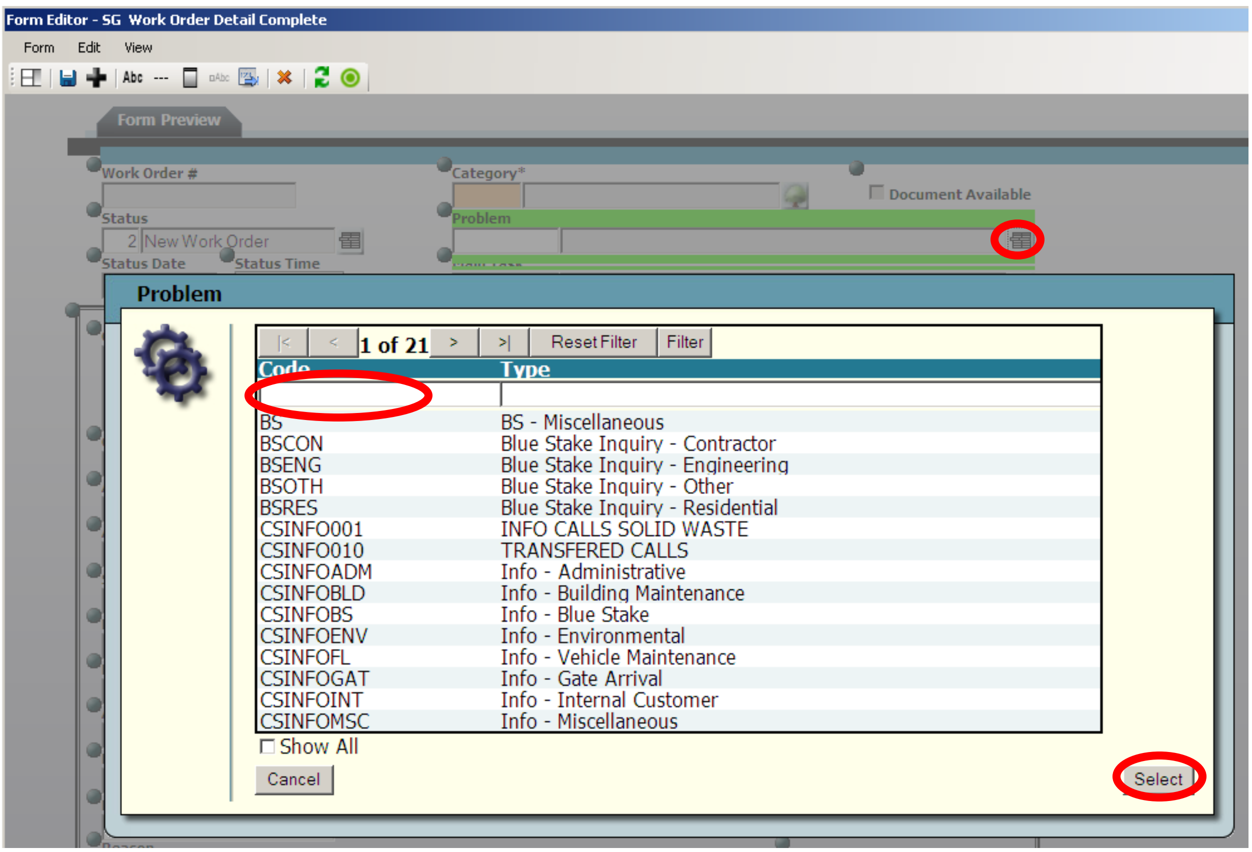
This editor allows for complete customization and acts as a blank canvas for you to create as many custom forms as needed. Each time you add a field, label, frame, behavior item, or alter a field property, those changes will appear automatically on the WYSIWYG editor. This allows you to make small modifications, check your work, and see what else is needed to customize your form.

Notes:____

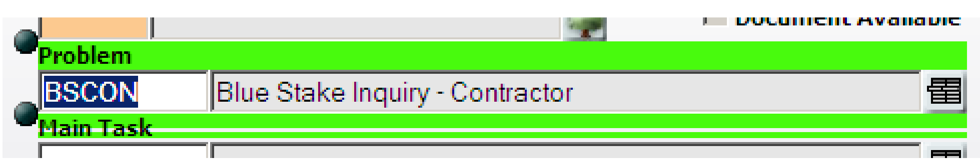
Viewing Fields on the Form

As we mentioned above, the Detailed Form Editor allows you to view fields as they will appear on the website. You're even able to type data into the fields, mark checkboxes, and access pick lists to see how each field functions. Below, we've shown an example of the Problem pick list.

1. Click on the button beside the Problem field to access the pick list.
2. Locate a Problem in the list, highlight it, and click *Select*.
3. The Problem will now be identified on the form. At this time, you'll be able to see if any other fields were automatically populated by the system based on your *Work Flow Setup*.

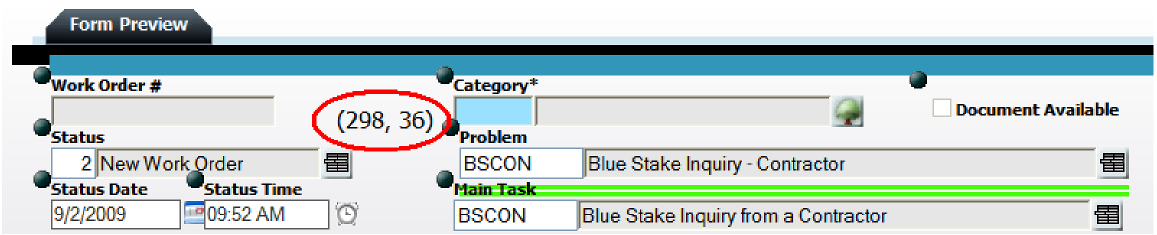


4. Note that the field currently selected on the form is outlined in bright green. This helps you quickly identify the field you are working with.



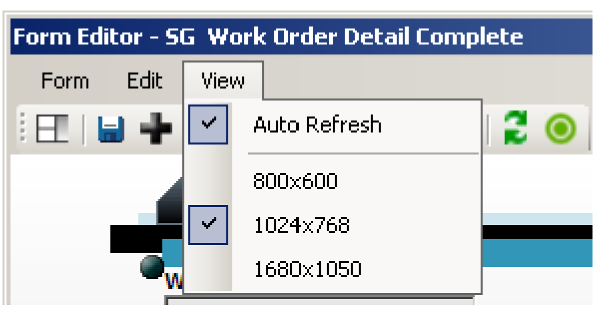
Locating Field Position on the Form

You can easily change the arrangement of fields on the form by clicking on the handle beside each field and dragging it with your mouse. As you drag fields on the form, the field position will be displayed. This allows you to verify proper field placement. Note that the form size will automatically adjust to accommodate your fields.



Changing Screen Sizes

The *View* menu at the top of the Detailed Form Editor allows you to change your screen resolution to 800 x 600, 1024 x 768, or 1680 x 1050. This feature allows you to see how your custom forms will appear to end users with different size computer monitors. When designing forms, you should take into consideration that some users, particularly those in the field, may have lower resolution monitors than those in the office.



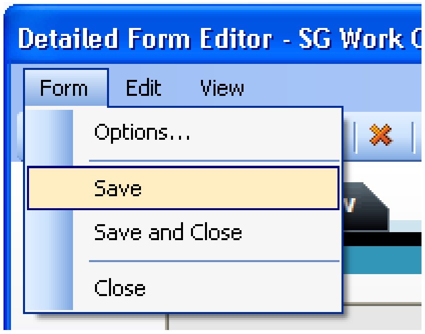
Deleting Fields on the Form

To remove a field from the form, select it by clicking with your mouse. Remember, selected items are underlined in green. Then, click the button. Note that you cannot remove fields that are required by the Lucity Desktop application. These fields are forced to remain on the form by the system; this button will be disabled when one of these fields is selected. However, you can hide required fields so they cannot be seen.

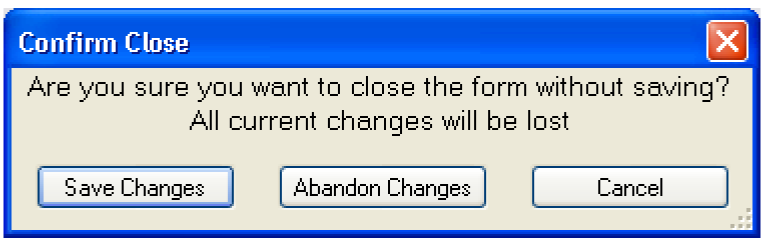
Saving an Edited Form

You have three options when saving your changes to a form:

1. Select **Form>>Save** to save all modifications to the form and continue working.
2. Select **Form>>Save and Close** to save all modifications to the form and close the Detailed Form Editor.



3. Click the  in the corner of the Detailed Form Editor and select *Save Changes* from the resulting dialog. This will save all modifications to the form and close the Detailed Form Editor.



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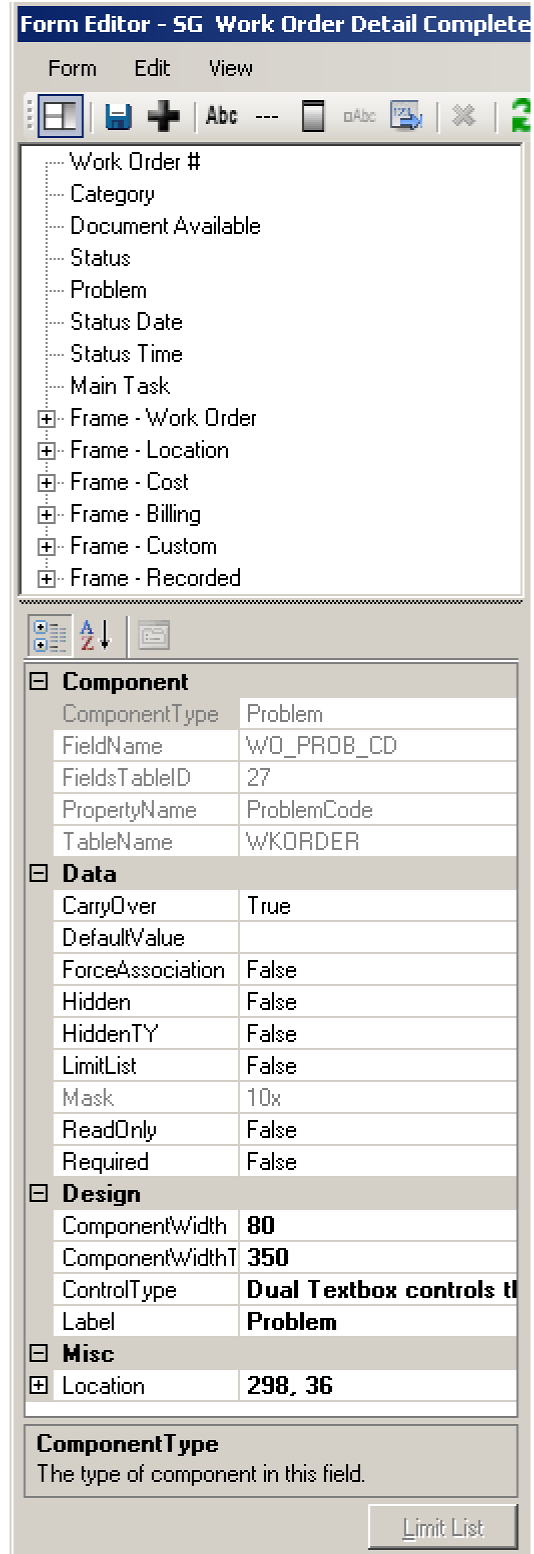
Form Details

The Form Details window lists all fields and components currently included on the form, and identifies each field or component's properties. You can use this window to customize the properties as needed.

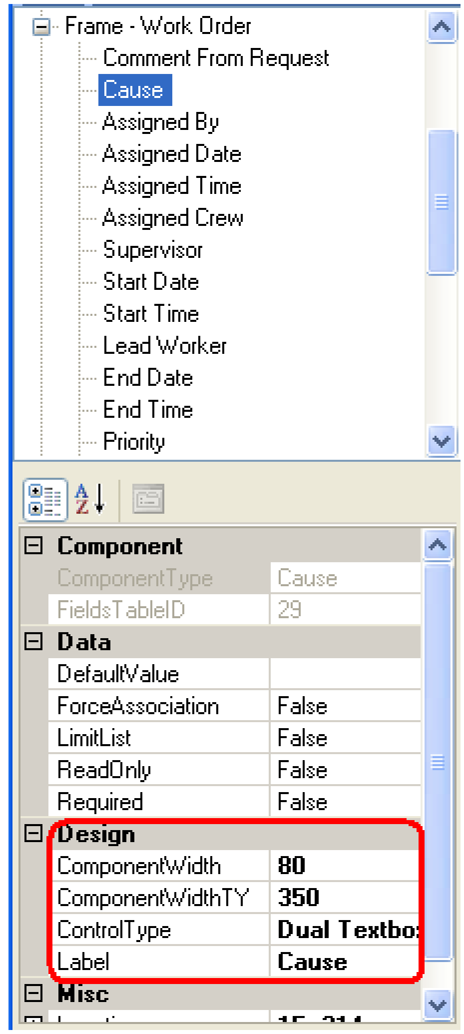
1. Click the  button to show or hide the details window.
2. The top half of the details window lists all fields and components currently included on the form in the order that they appear. As you move fields and components in the Detailed Form Editor, the list order will change automatically.
3. Select a field or component on the form by either clicking on its name in the list or clicking on its location on the form. The selected component will be underlined in bright green.
4. The properties displayed will change depending on which field or component is selected. These properties allow you to make fields read-only or required, include default values, re-label fields and components, resize fields and components, and much more.
5. Changes made to each field or component's properties will appear automatically in the Detailed Form Editor. This allows you to make small modifications, check your work, and see what else is needed to customize your form.



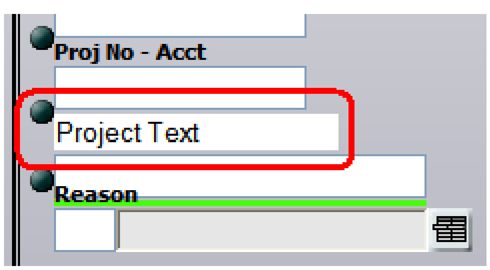
In the following pages, we'll go over specific examples of some of the individual properties that you can configure.

Design

1. You can specify the Component Height and Component Width (where applicable). These properties indicate the field height/width in pixels as it appears on the screen.



2. The Control Type property is used to define how code-description fields will be displayed on the screen. These fields can be displayed as one of the following (note that some of these options may not appear for certain component types):
    - o Combo Box – A series of boxes used to select assets. Sewer Pipes and Storm Conduits have dual combo boxes.
    - o Drop Down List – Displays the text or description field for selection.
    - o Dual Drop Down List – Allows users to select the code or description field.
    - o Dual Textbox – Allows users to manually enter a code, or select the code/type from a popup list.
    - o Textbox Control – Allows users to manually enter data which is then validated by the system when the field is exited.
3. The Label property allows you to customize the text header for a field.
    - o You can also customize field labels by clicking on a label in the Detailed Form Editor. A text box will appear allowing you to type directly on screen.
    - o When you change a label here, it is not changed in the list of fields in the Build-A-Filter dialog on the website. Only the previous label will appear.



Miscellaneous

Earlier we discussed how a field's position on the form is displayed as the field is moved. For precise field positioning, you can change the values in the Location property.

⊟ Component	
ComponentType	TextField
FieldsTableID	37
⊟ Data	
DefaultValue	
ReadOnly	False
Required	False
⊟ Design	
ComponentHeight	**16**
ComponentWidth	**180**
Label	**Project Text**
⊟ Misc	
⊞ Location	**15, 503**

Data

The Data section allows you to customize the following properties. The property list will change depending on the type of field that is selected:

⊟ Data	
CarryOver	True
DefaultValue	
ForceAssociation	False
Hidden	False
HiddenTY	False
LimitList	False
Mask	10x
ReadOnly	False
Required	False

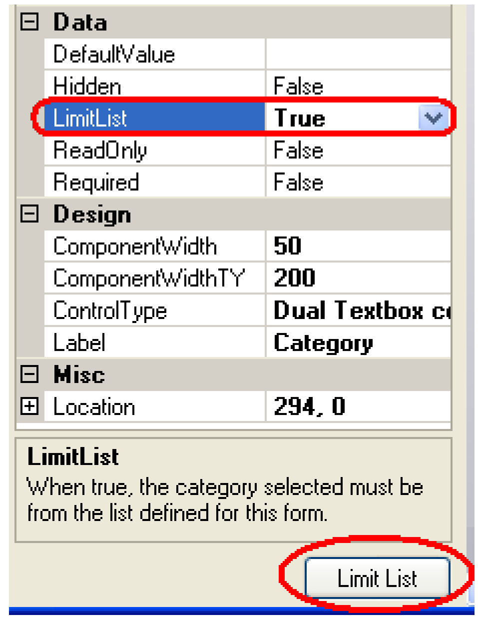
1. Carryover – True is the default. Set this to False if you do not want the user to be able to use the Carry Over button with this field.
2. Default Value – Any value selected in this field will automatically appear when a new record is created. It can be overwritten by the user before submittal unless the field is marked as read-only.
    - If a default value is designated in your Lucity Desktop application, it will NOT appear in the properties dialog; however, if no default value is entered here, the default value from your Lucity Desktop application will appear on the web form when it is run. Default values entered here will take precedence on the website over the ones from the Lucity Desktop application.
    - Any default values entered here will not affect the Lucity Desktop application.

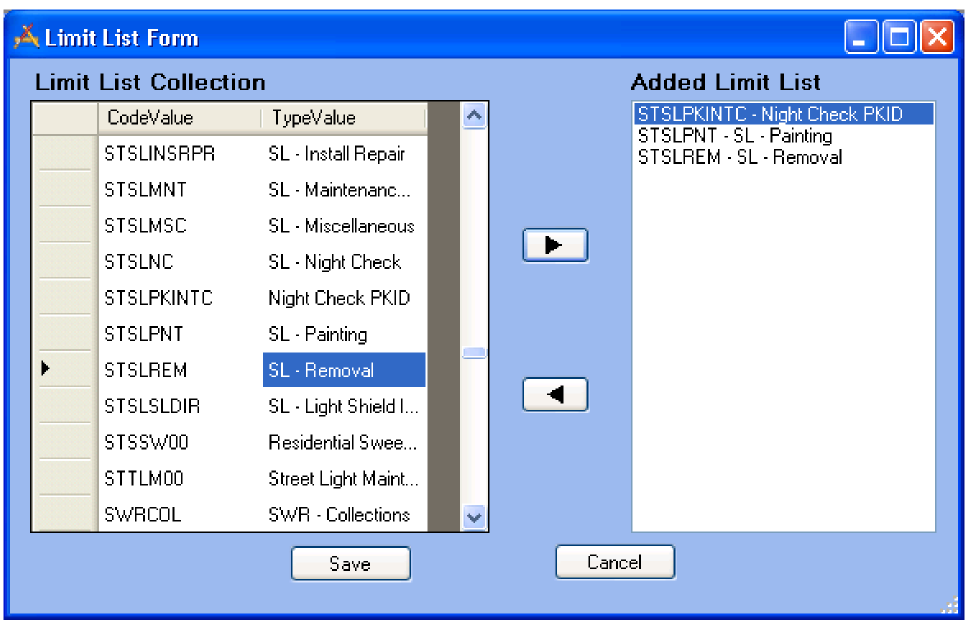
3. Force Association – Work Flow popups such as Problem and Cause are "Force Associated" with Categories. This means that only the Problems (or Causes, etc.) that are associated with the Category will be available for selection; however, the presence of a "Show All" function allows users to choose Problems or Causes that are not associated with the Category.
    - If Force Association is set to True, the "Show All" option will not be available; only the forced association Categories will appear.
    - If Force Association is set to False, the "Show All" option will be available only for users who have been granted the "Show All Enabled" permission in Security.exe.
        - The "Show All" option is only available if the Control Type is set to "Dual Textbox".
        - If a Category does not have Problems, Causes, etc. associated with it, or if a Problem identifies a default Supervisor who is not also associated with the Category, users without "Show Enabled" permissions will be unable to complete the web form if the Problem, Cause, or Supervisor field is required. These associations and defaults are established in the Lucity Desktop application, *Work Flow Setup* modules.
        - We recommend that you thoroughly test all forms before implementing their use.
4. Hidden – If this is set to True, users will not be able to see the field in the form.
5. HiddenTY – If this is set to True, users will not be able to see the Type portion of a code/type popup but will be able to continue seeing the code portion
6. Mask – This provides the administrator with an understanding of what type of data can be entered into the field. This data cannot be edited here and is read-only.
7. Read Only – If this is set to True, users will not be able to enter data in the field.
8. Required – If this is set to True, users must enter information in the field in order to submit the form.
    - In Work Order forms, the Required property for the "Category" field will default to True. All other fields' Required properties will default to False.
    - If you make a field required on the web form it will not affect the Lucity Desktop application; however, if a field is required in the Desktop application it will be forced onto the form by the Admin UI and will also be required on the web.
    - Required fields will be identified with an asterisk (*) and a different background color.
    - An error message will be displayed if users attempt to submit a form without data in these required fields.

    - In the example above, the Category field is required.

9. Limit List – When this is set to True, the *Limit List* button will be enabled, allowing you to select the specific pick list items available to users on the web. To use the limit list, complete the following steps:

   - Add a field that can be limited to the form. Examples include Problem, Category, Affected Asset, etc.
   - In the Properties grid, click on the Limit List property and select *True*. The Limit List button will be enabled.
   - Click on the Limit List button to access the Limit List form. The Limit List selection grid will display the code and description for each item available. You can highlight one or multiple selections in the left-hand grid and add them to the right-hand grid using the arrows in the center of the form. The items you add to the Limit List will be the only ones available for selection to end-users when running the form on the web.
   - Save your changes.

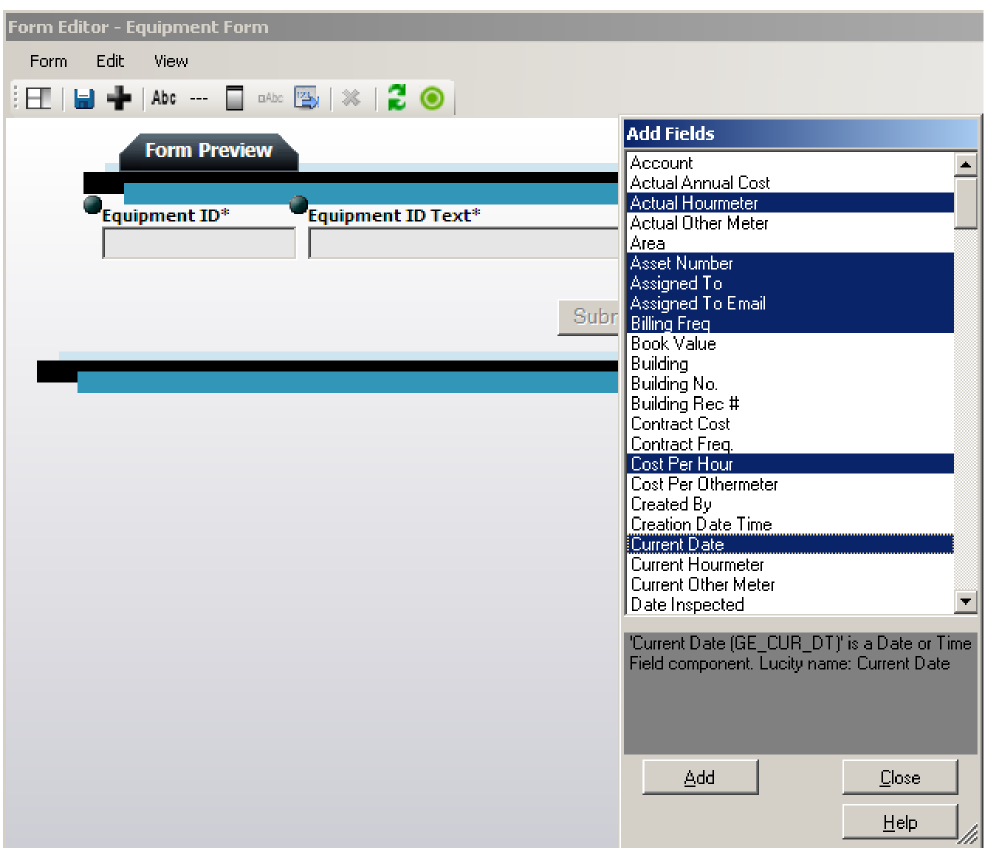




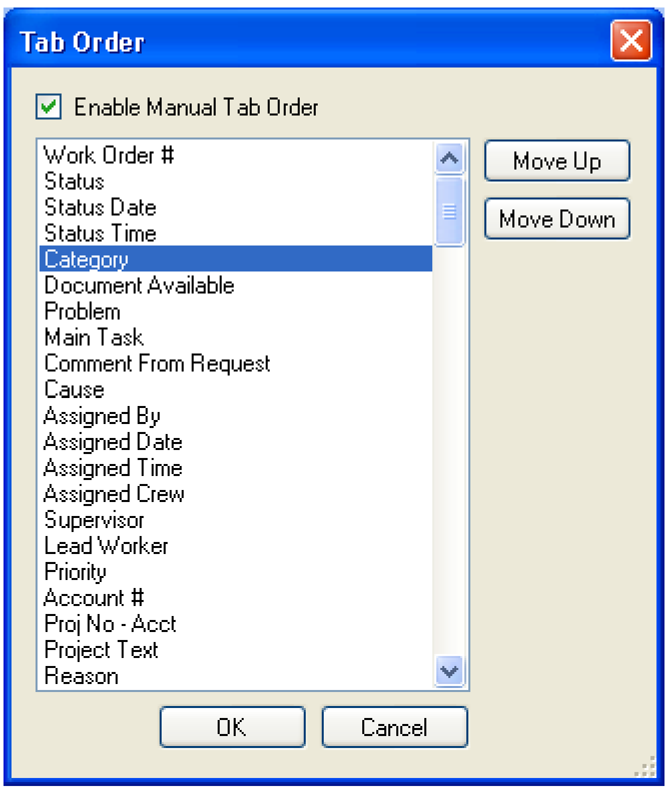
Adding Fields to the Form

You can select specific fields from those available in the Lucity Desktop application to add to the Detailed Form Editor. Remember, fields that are required by the Lucity Desktop application will be forced onto the form.

1. To add fields to the Detailed Form Editor, click the  button on the toolbar at the top of the form. The list of available fields will appear.
   - These fields differ depending on which program, module, and component you chose in the Form Manager.
   - If you have changed the default field names in your Lucity Desktop application, your custom names will appear in this list.
2. To select fields, click on the field names in the list.
   - You can choose as many or as few fields as you wish to be included on your custom form; however, each individual field can only be added once per form.
   - As you highlight each field in the list, a brief description will appear at the bottom of the dialog. This description displays the field name, component type, and default Lucity caption.
3. Click the *OK* button to close the list of fields and add the selected fields to the form.
   - When you click the toolbar button again to add additional fields, only fields not currently added to the form will appear in the list.
4. Alternatively, click the *Cancel* button to close the list of fields without making any changes to the form.



5. The system will place fields on the form in the order in which you selected them in the Add Fields dialog. Remember, you can easily change the arrangement of fields on the form by clicking on the handle beside each field and dragging it with your mouse.
6. The tab order for fields in the Forms is automatically assigned by the system in a left-to-right, top-to-bottom manner. Note that this automatic tab order takes into consideration the placement of fields within frame, meaning that users can tab through all of the fields in one frame before the tab order shifts to a second frame. If you'd like to manually select the order in which users can tab through the fields on screen, complete the following steps:
    - Select **Edit>>Tab Order** from the menu at the top of the Detailed Form Editor.
    - The following dialog will appear. It lists all fields currently included on the form.
    - Select the "Enable Manual Tab Order" checkbox.
    - Highlight individual fields in the list and click the *Move Up* or *Move Down* buttons to change the tab order.
    - Click *OK* when you are finished making your changes.



Notes:

Adding Special Items

The Detailed Form Editor Toolbar allows you to add additional features to customize your form's look and feel.

Label or Instructions – This button adds a label to the form, allowing you to add text or notes directly to the form.

- When you click this button, an item with the words "Change My Text" will be added to the Detailed Form Editor.
- Click on "Change My Text" to access a text box. This allows you to type your custom label or instructions directly on the form.

Dividers – This button adds a horizontal line that visually breaks up the form.

Frames – This button adds a frame to the form. This allows you to group similar fields.

- You can change the size of your frame by placing your mouse over the triangular image at the lower-right corner of the frame. Your cursor shape will change allowing you to resize the frame.
- Place fields inside the frame by using each field's handle to drag and drop them inside the frame's borders.
- When you use the frame's handle to change its location, all fields with handles contained inside the frame's borders will be moved along with the frame. Frames can be placed anywhere on the form; the form size will adjust automatically to accommodate frame placement.

Behavior Modifiers – This buttons adds a "Remember Me" or "Use Requestor's Address" checkbox to the Request Submittal forms.

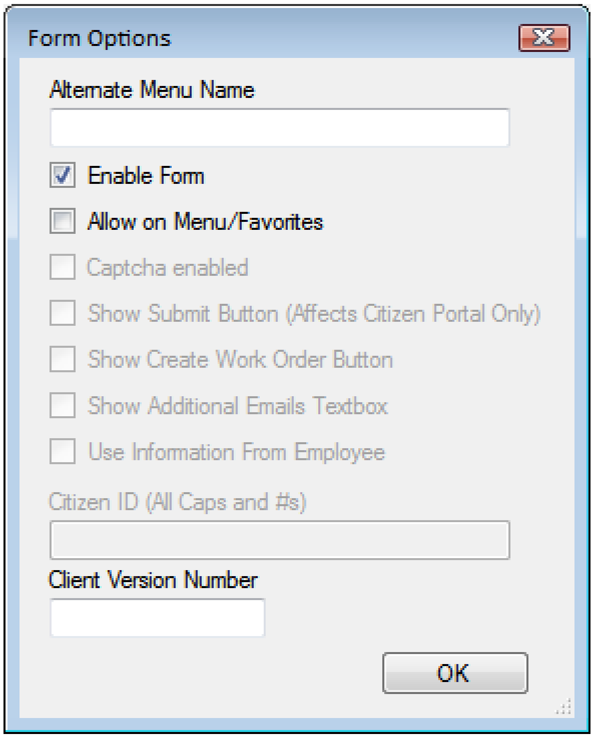
- To indicate which behavior item should appear on the form, access the Form Details window. Use the drop down list beside the Behavior Item component to select one of the two options:
  - Save Requestor Cookie – This places the "Remember Me" checkbox on the form, saving the user's typed name, address, and contact information for future use.
  - Use Requestor Address – This places the "Use Requestor's Address" checkbox on the form, allowing users to carry the requestor address over to the location address fields.

File Upload – This button adds a file upload field to the form. The fields only work on Request Forms and allow requesters to attach a file to their request. The file is then uploaded to the server and linked to the request.

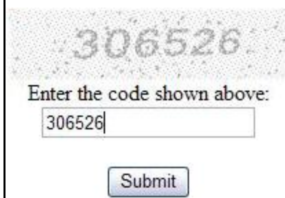
Notes:

Form Options

To access the form options, select **Form > Options** from the menu at the top of the Detailed Form Editor. The available options are defined below.



Option	Description
Alternate Menu Name	When a Form is created a unique name is required. By default, that name appears at the top of the form, on the menu, and on the website. If the form should have a different name or alias, add that here. If this field is filled in only the Alternate Menu Name will be seen by the end-users.
Enable Form	This checkbox makes the form accessible to users in the web app. All forms, whether they represent parent or child records, will need to be enabled to be used on the web. *Note: This is a very important step. If the form is not enabled, it will be unavailable for use in the webapp.*
Allow on Menu/Favorites	Mark this box to make the form available for use on internal menus. Note that this checkbox is only available on certain types of forms. Typically, these are parent records (like Work Orders, Requests, or Inventory forms). Child records will not be added to menus (i.e. Work Order Resources, Fleet Components, etc.). *Note: This is a very important step. If this box is not checked, the form will not be available to add to a menu. Follow the link for additional information on adding forms to menus.*

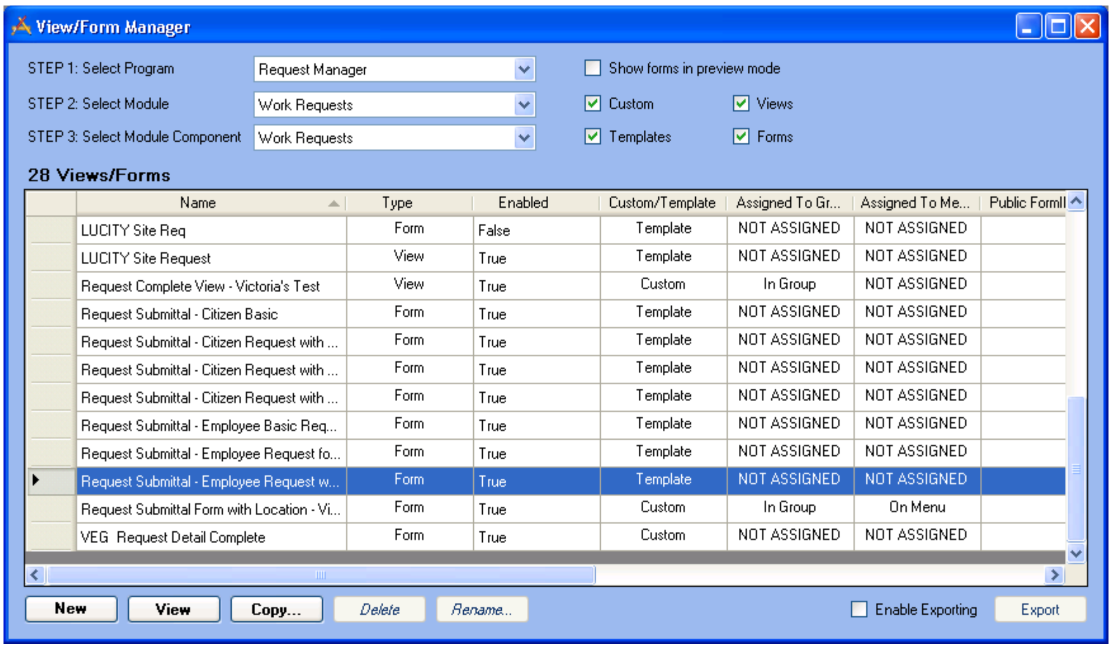
Captcha enabled	Captcha is a way to reduce some of the spam requests that might otherwise be submitted through a web form. Checking this box adds a code similar to the following to the request web page. Users will be required to type the code prior to submitting their request. 
Show Submit Button	This box allows administrators whether or not the Submit button will appear on a web citizen form. Marking this box causes the button to appear. This usually needs to be checked.
Show Create Work Order Button	This adds a Create Work Order button to internal request forms. This allows users to enter a request, then save and create a work order quickly.
Show Additional Emails Textbox	This provides additional email address fields to web citizen forms so that a requester can have the request create email sent to more than one email address.
Use Information From Employee	Checking this option causes the form to pull information from the employee's Lucity employee record (Work > Work Flow Setup > Employees) to populate fields when they are filling out a request. This works for internally submitted requests.
Citizen ID	The Citizen ID makes forms accessible to the Web Citizen product. This field is used to link an external site to a form. In addition, this can be used over an intranet site for an agency's users that do not have a Lucity login ID. Enter a unique, alphanumeric ID using uppercase letters and numbers only (e.g. XYZ123, CITIZEN1). Do not use any symbols (i.e. *, #, %). The ID will then be used in an entry page from an external, non-web site. You'll need to include a string similar to the following: **<"http://<servername>/LucityWebCitizen/?FUI=XYZ123">Click here to report a problem ** *Note: For public web forms to be used by citizens, several security permissions will need to be enabled. Consult the Group Assignment topic for additional information. To make public web forms available to internal users, mark the Allow on Menu checkbox. Administrators can then add the form to menus and assign groups to it. To make this only accessible to public citizens, Do not check Allow to Menu.*

Practice Problems

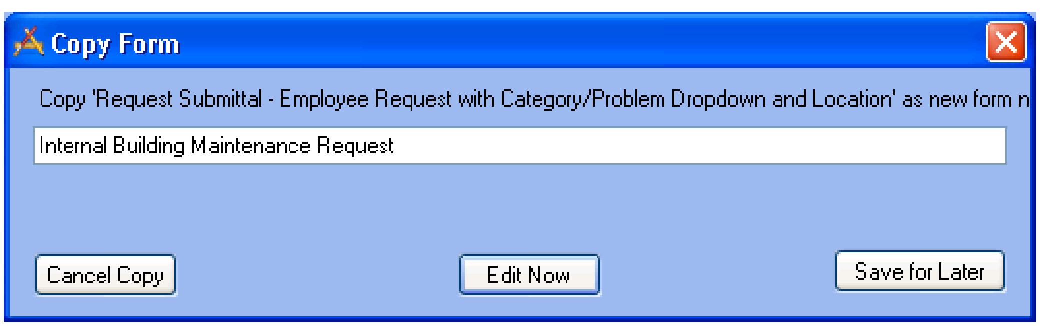
In the following pages, we've included a series of practice problems to help you set up your web forms. Follow the instructions below to enhance your understanding of the Lucity Web application.

Practice #1 – Request Submittal for Building Maintenance

1. In the Form Manager, copy "Request Submittal – Employee Request with Category/Problem Dropdown and Location".



2. Rename it "Internal Building Maintenance Request".
3. Select *Edit Now*.



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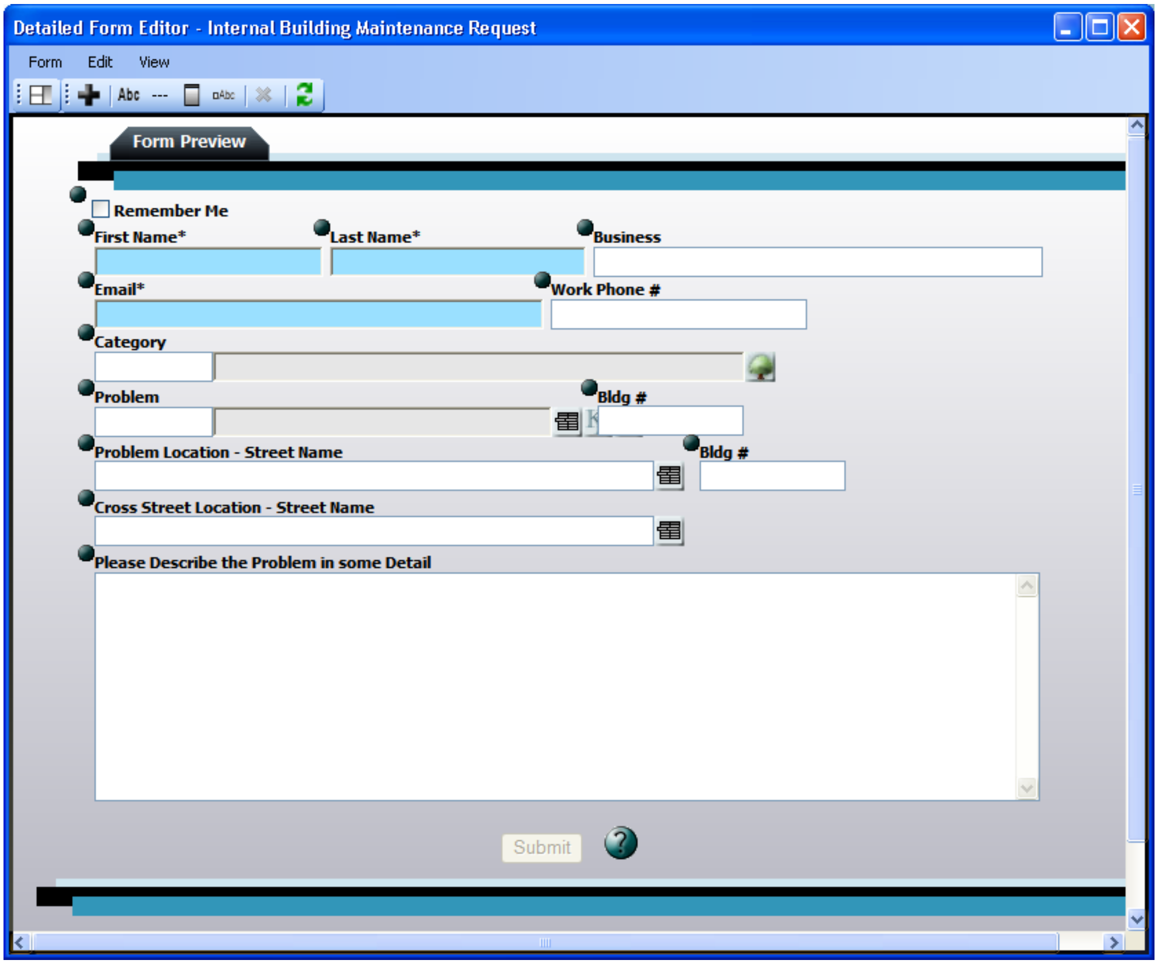
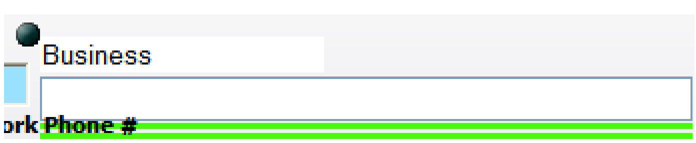


4. Delete the Building # and Street Name fields.

    o Click on each field individually and use the  button to remove them from the form.

5. Rename the "Business" field to "Department".

    o Click on the "Business" label and type the new name in the text box.



Notes:____

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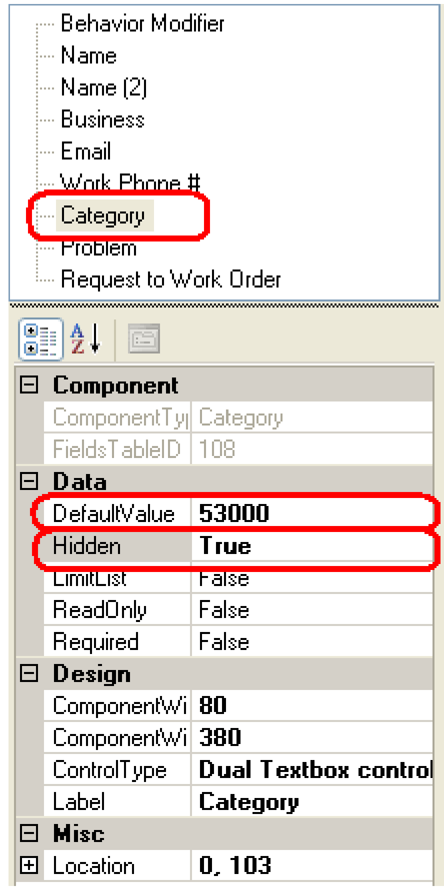
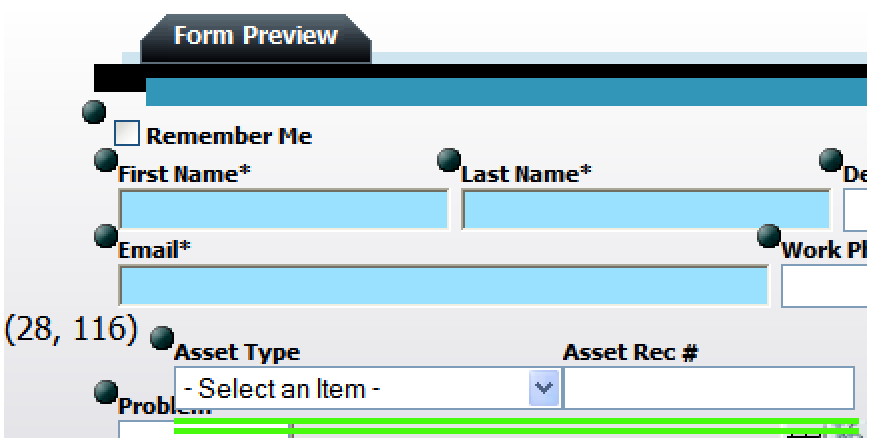
6. For the Category field, make the following adjustments in the Form Details dialog:

    - Click the  button to access the Form Details.
    - Select the Category field in the top portion of the dialog.
    - Click on the Default Value property and select "53000" from the drop down list.
    - Click on the Hidden property and select "True" from the drop down list.

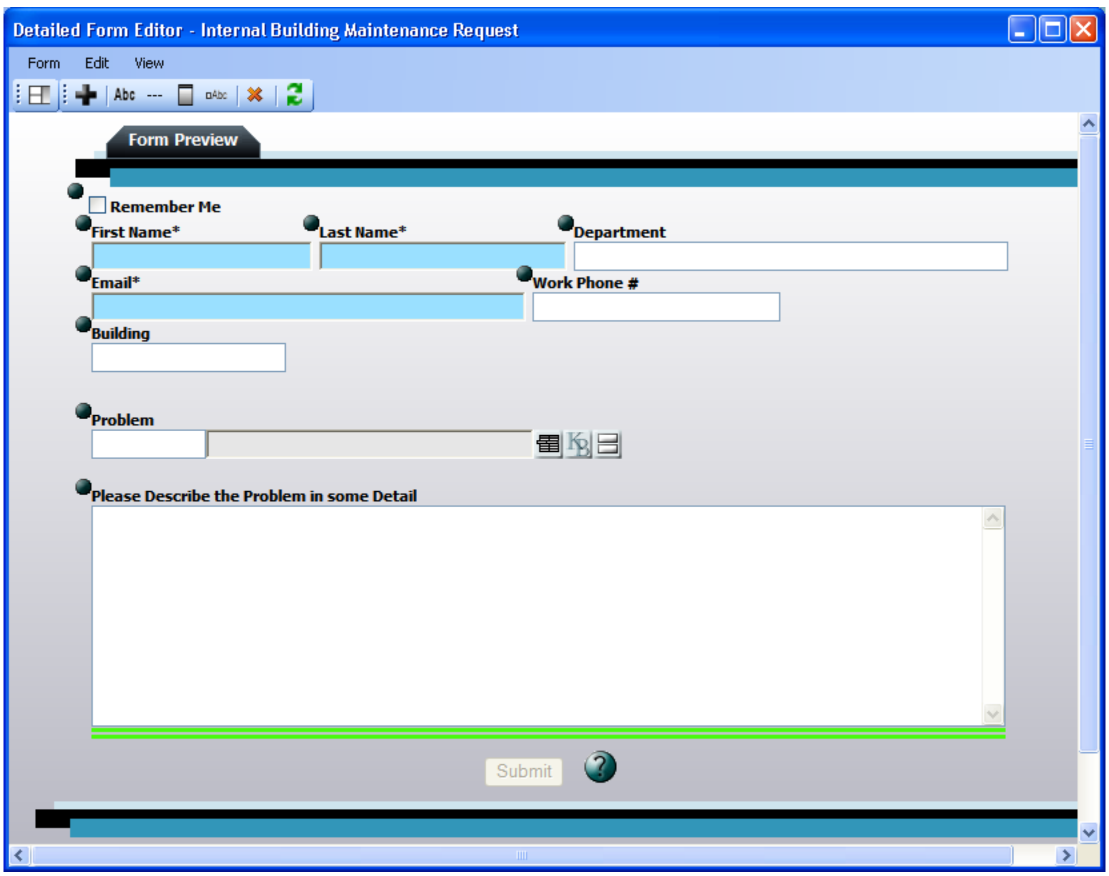


7. Add the "Asset Rec #" field to the form.

    - Click  to access the Add Fields dialog.
    - Highlight "Asset Rec #" and click *OK*. It will be added to the bottom of the form.
    - Click on the handle  and drag the new field to where Category used to be.



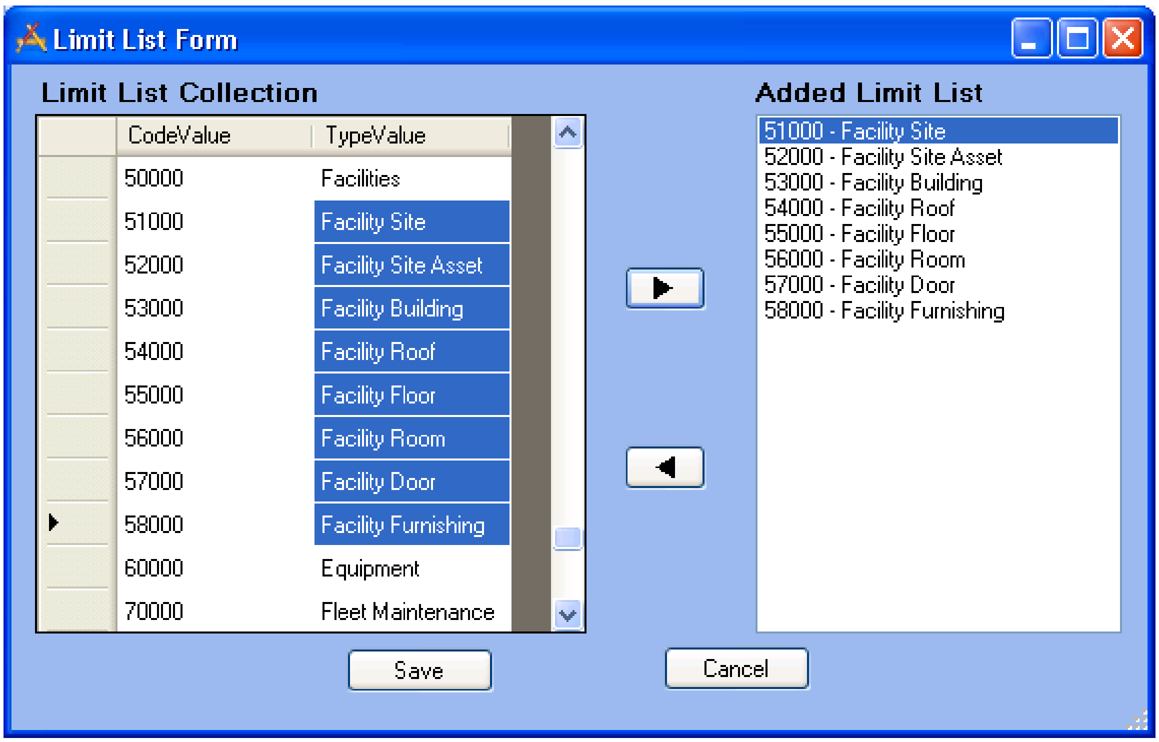
8. In the Form Details dialog, set the following properties for the Asset Rec # field:
   - Set the Default Type to “Facility Building”.
   - Set the Hidden Type to “True”.
   - Change the Label for Asset to “Building”.
9. In the Detailed Form Editor, move the Problem field down one field height (use the handle to drag it to its new location).
   - Look at the Form Details for the Problem field and note how the Force Association property is “True”.
   - Do you want to use any Scripts? The button beside the Problem field is used to display scripts for users. Remember that script answers do not get carried over to the work order but information in the Comments field does.
10. Use the handle to move the Comment field up a bit on the screen. Your form should now look similar to the following:



11. Save and Close the form.
12. To finalize the form, complete the following steps:
   - Assign Groups to the Form.
   - Add the Form to a new Menu Group titled “Internal Requests”. Refer back to the instructions earlier in this workbook if you have any questions.
   - View the form on the web and add one or two records to practice using it.

Practice #2 – Internal Facility Maintenance Request

1. In the Form Manager, copy the "Internal Building Maintenance Request" form and rename it "Internal Facility Maintenance Request". Select *Edit Now*.
2. Use the handles to move the Comment, Problem, and Building fields down.
3. Open the Form Details dialog and select "Category". Make the following changes to the Category's field properties:
   - o Set the Hidden property to "False".
   - o Set the Limit List property to "True".
   - o Click on the Limit List button and select all Facility Categories:



4. Select the "Asset Rec #" field and make the following changes to the field properties:
   - o Clear out the Default Type.
   - o Set the Hidden Type property to "False".
   - o Set the Control Type equal to "A series of comboboxes that narrow a final combobox's asset list".
   - o Set the Facility Option equal to "Building Driven List".
   - o Change the Label for Asset to "Asset".
5. You'll need to move the Asset Type, Problem, and Comment fields to improve the appearance of the form. Use the handles to drag them to their new locations.
6. Save and Close the form.

7. Finalize the form.
    - Add Groups to the Form.
    - Assign the Form to the "Internal Requests" Menu Group.
8. View the form on the web and add one or two records.

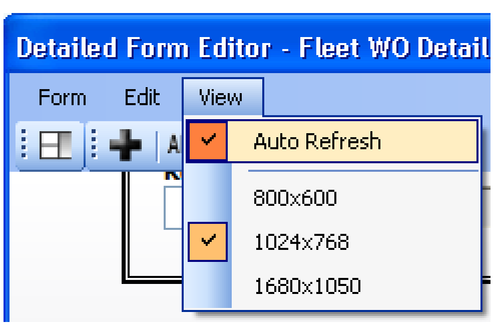
Practice #3 – Internal Facility Maintenance Request 2

1. Copy "Internal Facility Maintenance Request" and rename it "Internal Facility Maintenance Request 2". Select *Edit Now*.
2. Open the Form Details dialog and select the Asset Rec # field.
3. Change the Control Type to "Textbox control that allows manual entry. . . "
4. Save and Close the form.
5. Finalize the form.
    - Assign Groups to the Form.
    - Assign the Form to the "Internal Requests" Menu Group.
6. View the form in the web and add one or two records. Notice how the method of selecting Rooms in both forms varies for the end user.

Practice #4 – Fleet WO Form

1. Copy "ACT2012 Work Order Detail Complete" and rename it "Fleet WO Detail".
2. Remove the Location, Billing, and User Defined Fields (and Frames);

> *Note: When removing multiple fields, you may find it useful to turn off the "Auto Refresh". This option is enabled by default. When turned on, the form will refresh automatically each time a change is made. If this option is turned off, you will not see the visual impact of your form changes until you turn the Auto Refresh back on, or click the Refresh button on the toolbar.*



3. Add the System ID 1 field onto the form
4. Use the handle to move the System ID 1 field to the header section at the top of the form.
5. Change the field label from "System ID 1" to "Vehicle".
    - Click on the label in the Detailed Form Editor and type "Vehicle" in the text box.

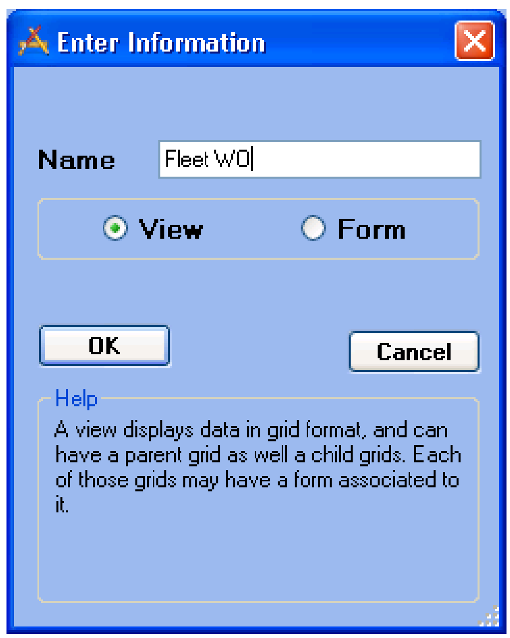
6. Use the handles to move the Recorded and Cost Frames higher up in the form.
    - Notice how when you move a Frame, all fields included in the Frame move as well.
7. Save and Close the form.

Practice #5 – Fleet WO Form 2

1. Copy “LUCITY WO Fleet Asset” and rename it “Fleet WO Asset”.
2. Select the “Asset Rec #” field and open the Form Details dialog.
3. Notice how the Hidden Type is set to “True”.
4. The Default Type should default to “Fleet”.
5. Notice how the field is set to “Required”.
6. Change the Label for Asset to “Fleet ID”.
7. Set the Control Type equal to “Textbox Control”.
8. Add the following fields:
    - WO Cost
    - Asset Comment
9. Change the Width of the Asset Comment field to 550.
10. Change the Label of the Asset Comment field to “Fleet Comment”.
11. Change the Tab Order, if desired.
12. Save and Close the form.

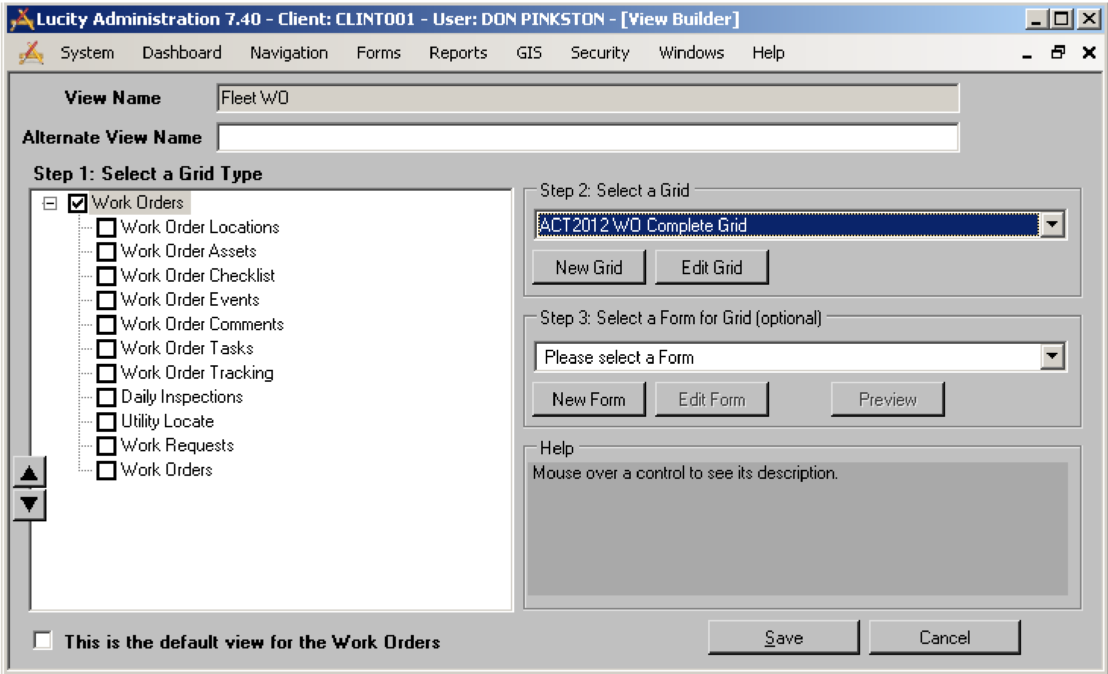
Practice #6 – Create New Fleet WO View

1. In the Form Manager, select the following from the drop down lists at the top of the screen:
    - Select Program – Work Order Manager
    - Select Module – Work Orders
    - Select Module Component – Work Orders



2. Click the *New* button at the bottom of the screen.
    - In the Form Name field, type “Fleet WO”.
    - Select the “View” radio button.
    - Click *OK*.

3. In the View Builder, make the following changes:
   - In Step 1, select the “Work Order Module” grid type.
   - In Step 2, choose the “ACT2012 WO Complete Grid” from the drop down list.



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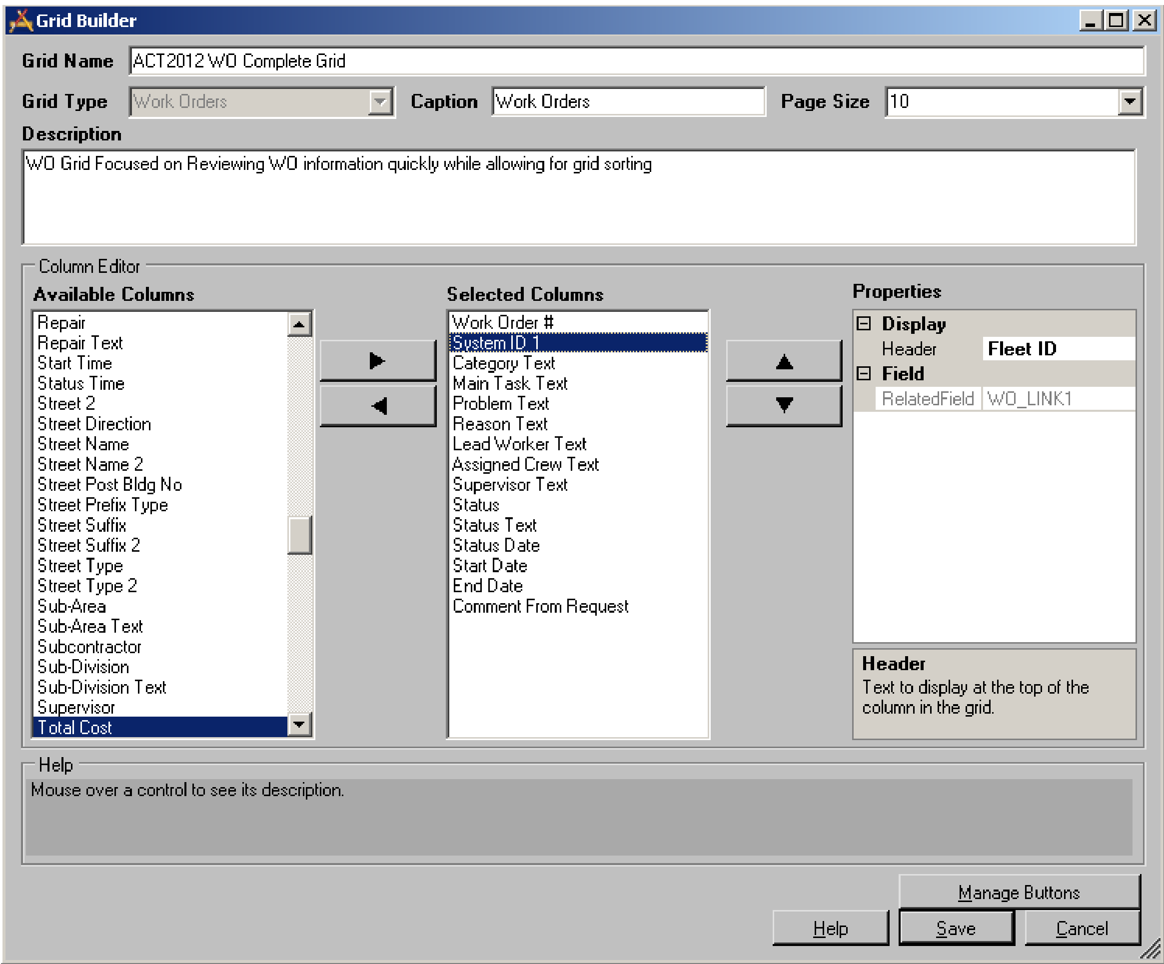
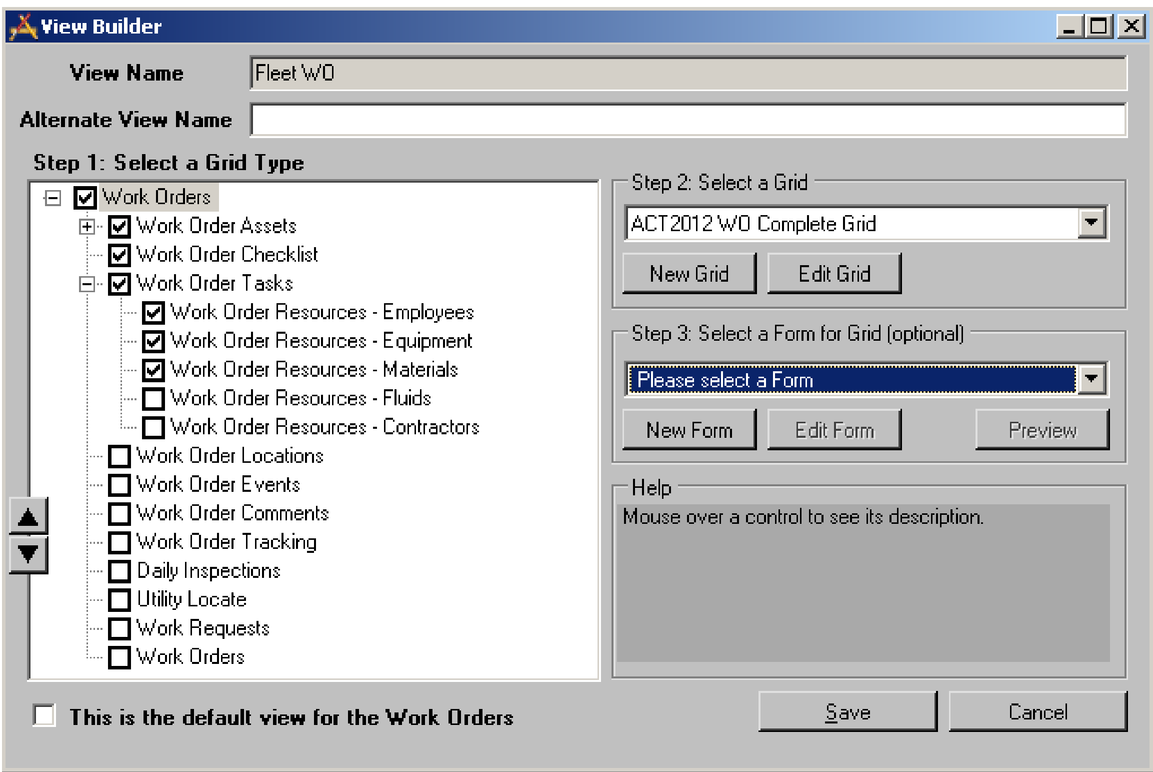
4. Click on the *Edit Grid* button to access the Grid Builder. Then, make the following changes:
   - From the Available Columns grid, select "System ID 1". Use the right arrow button to add it to the Selected Columns list.
   - Highlight "System ID 1" in the Selected Columns list and use the up arrow button to move it directly underneath "Work Order #".
   - Change the "System ID 1" Header to "Fleet ID".
   - Save your changes.



5. In the View Builder, select the "Work Order Assets" grid type.
   - In Step 1, move the Work Order Assets grid directly underneath Work Order Module.
   - In Step 2, select the "ACT2012 WO Asset Grid Complete".
   - In Step 3, select the "Fleet WO Asset" form.
6. Select the "Work Order Checklist" grid type.
   - In Step 1, move the Checklist grid directly underneath the Work Order Asset grid.
   - In Step 2, select the "ACT2012 WO Checklist Grid".
   - In Step 3, select the "ACT2012 WO Checklist Complete" form.

7. Select the "Work Order Tasks" grid type.
   - In Step 1, move the Tasks grid directly underneath the Work Order Checklist grid.
   - In Step 2, select the "ACT12 WO Task Review Grid".
   - In Step 3, select the "ACT2012 WO Task Complete" form.
8. Click on the plus sign [+] beside the Work Order Tasks grid.
   - Select all of the resources you'd like to add to your View.
   - Select the corresponding ACT12 Grids and Forms for each resource type.
   - Organize each item up or down according to your preference.
9. Your View should resemble the following when you are finished.



10. Save your changes.

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Additional Practice

For additional hands-on practice, build the following forms:

1. Request Complete (for review)
2. Request Submittal
    - Employee Fleet Requests – This should be a simple Detail Submittal form allowing employees to enter maintenance requests for their vehicles.
    - Employee Building Maintenance Requests – This should be a simple Detail Submittal form allowing employees to enter building or room maintenance requests.
    - Constituent Requests Taken by Employees – This should be a simple Detail Submittal form allowing call center employees to record phone requests from citizens.
    - Constituent Requests Made by Constituents – These should be a simple Detail Submittal forms that are pushed out to your external web site for citizen use.
        - General Request – A very basic request containing contact information and a comment field.
        - Tree Maintenance Request – This could be the same as the General Request form but with the addition of scripts based on the problem selected and Problem Limit Lists specific to Trees.
        - Parks Requests – This could be the same as the General Request but with the addition of Problem Limit Lists specific to Parks.
        - Solid Waste Pickup Request – This could be the same as the General Request but with the addition of Problem Limit Lists specific to Solid Waste.
        - Pothole Issues – This could be the same as the General Request but with the addition of Problem Limit Lists specific to Pavements.
3. Work Order Complete (for review)
4. Lead Worker Forms (no costs displayed, limited information)
    - Fleet Maintenance
    - Sewer Maintenance
    - Solid Waste Pickups
    - Facility Maintenance
5. Supervisor Forms (more information available)
6. Equipment Complete (for review)
7. Create a new form from scratch – WO for Fleet (View)
    - Add a new Grid – Fleet WO
    - Add a new Form – Fleet WO

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