NDOT LUCITY WEB (DASHBOARD) TRAINING

LUCITY WEB (DASHBOARD) INTRODUCTION & NAVIGATION

SEPTEMBER 9TH, 2020 (UPDATED 3/12/2021)

OBJECTIVE

- Provide an overview for beginner and intermediate users on how to use and navigate Lucity Web (Dashboard), NDOT's Asset Management System

TODAY'S AGENDA

- Lucity Web (Dashboard) vs the Lucity Desktop
- What is the Dashboard?
- Lucity Web (Dashboard) Navigation
- How do I set up my Dashboard?

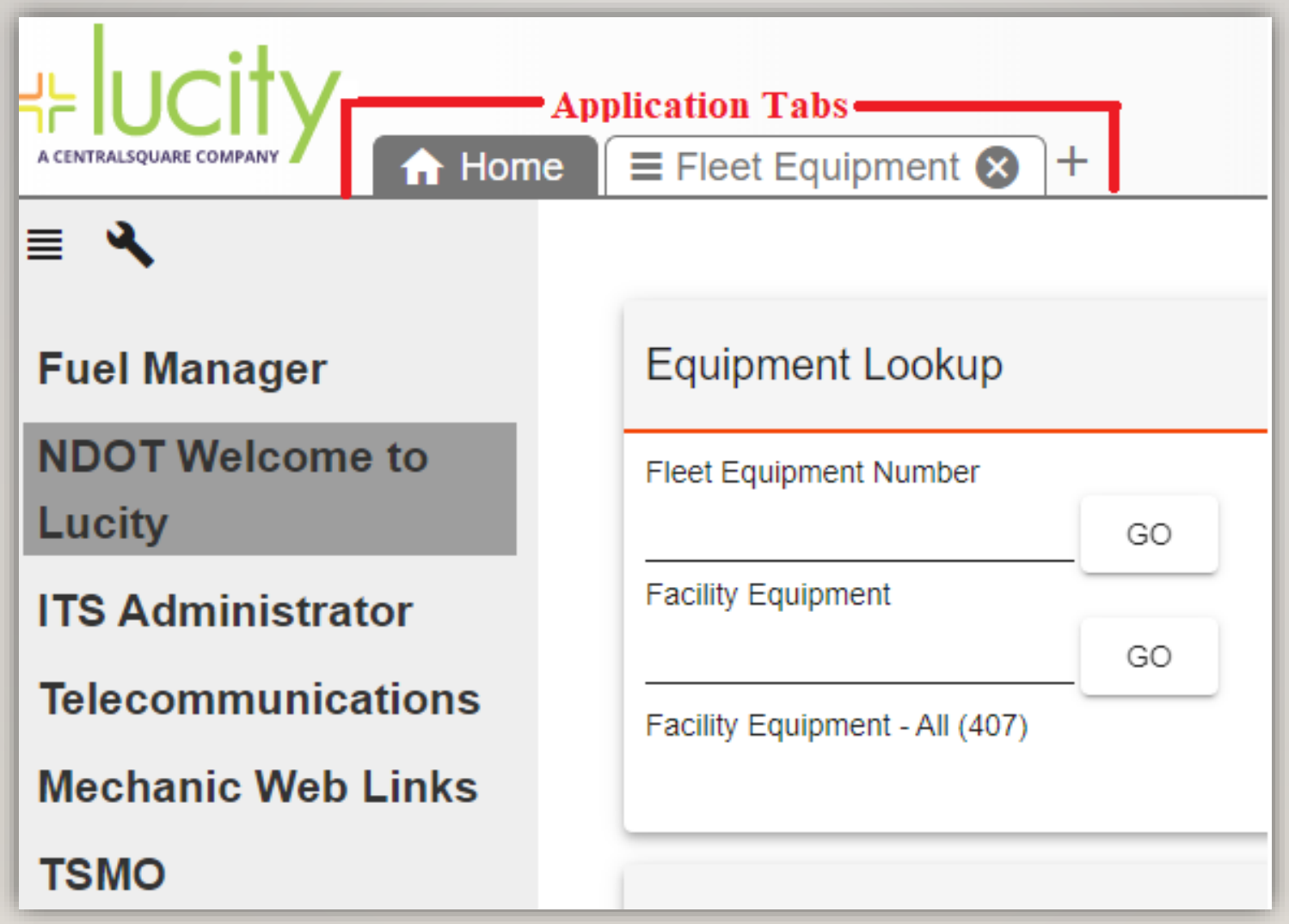
LUCITY WEB (DASHBOARD) VS THE LUCITY DESKTOP

- Lucity is NDOT's Asset Management System. This system holds our Fleet, Equipment, Facility, ITS Communications and Traffic Signal data. Work Orders/PMS are created and generated by the system (and by the users) for maintenance on our assets and facilities.
- The desktop is the legacy version of Lucity. This technology is outdated and all Lucity users should be using the Lucity Web (Dashboard). Lucity Web allows you to utilize customized views, forms, grids and menus. You will use the forms to view, add, and edit data (system permissions will vary depending on your job duties). In addition, the web application has a dashboard feature that makes organizing and retrieving data quick and easy.

WHAT IS THE DASHBOARD?

- The Dashboard, which is conveniently located under the Home Tab, provides an overview of relevant data and reports from several Lucity modules. The Dashboard is a powerful application that allows users to see critical information at a glance.
- The Dashboard helps users:
  - make informed decisions;
  - quickly access the forms and resources they use most often on the job; and
  - determine which module they wish to view and then drill-down to more detailed information.

Dashboard Layout



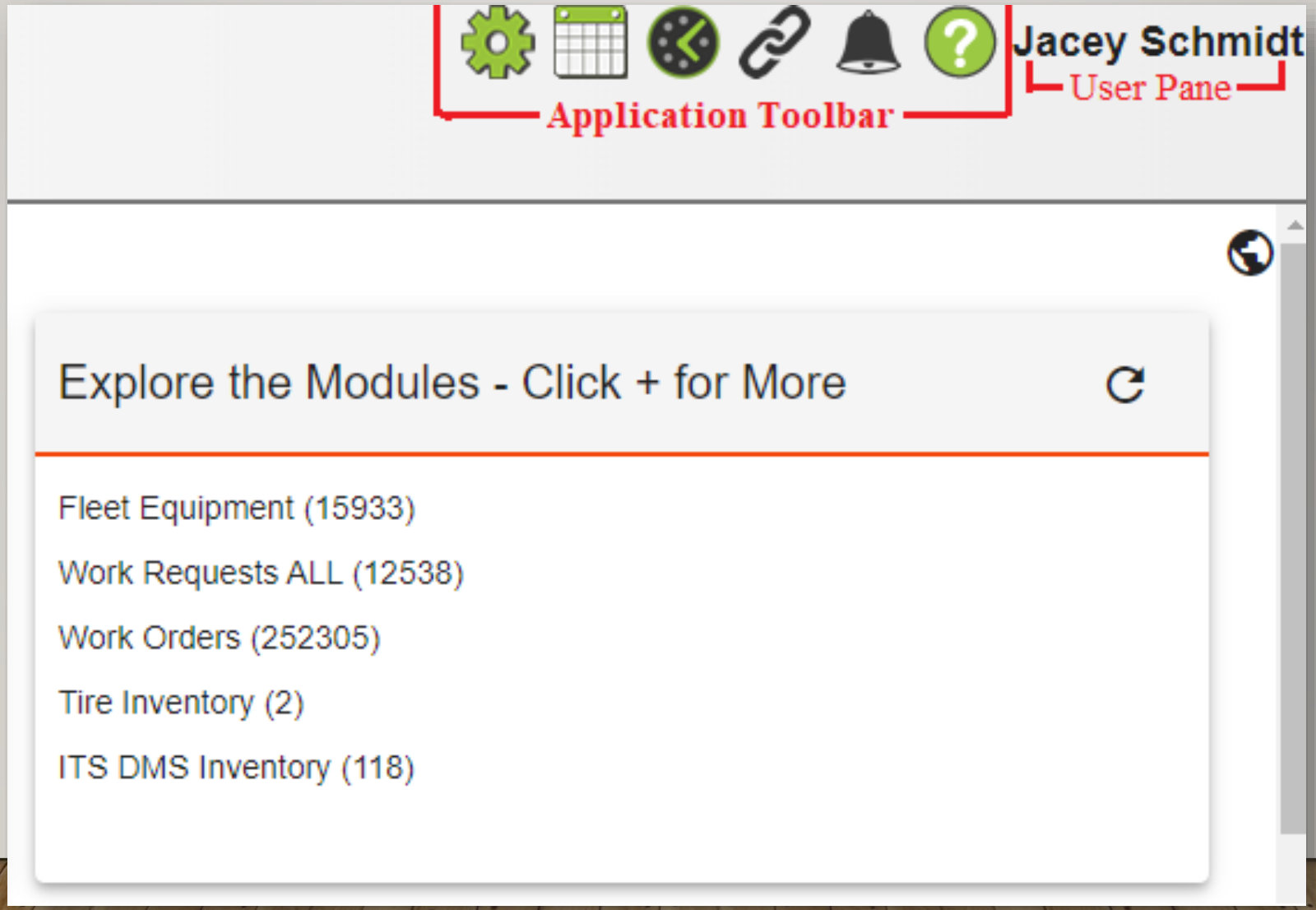
Dashboard Layout

Application Tabs

A row of tabs runs across the top of the tool. Each tab is an open Dashboard, or View. Click on a tab to switch to it and display its contents. Users can open an unlimited number of application tabs.

	Home Tab	Displays the current user's Dashboard. This tab cannot be closed.
	Add Tab	Allows users to open another application tab. They can pick from a list of favorites, recently opened views, an organization-defined menu of views, or the modules menu.

Dashboard Layout



Dashboard Layout

Depending on your security permissions you may not have all of the icons/tools on your application toolbar.
We do not have the Web Map icon since we do not have GIS integrated with Lucity at this time.

Application Toolbar

The ***Application Toolbar***, located in the upper-right corner of the ***Lucity Web*** interface, gives users quick access to several ***Lucity*** tools and resources. It remains visible no matter what dashboard or view a user has open.

This toolbar cannot be customized; instead, a tool appears only when an agency chooses to implement it and gives a user access to it.

Icon	Tool	Description	Setup
	Admin Portal	Enables administrators to access general admin information for the entire Lucity program including Licenses, System Settings, etc...	
	Work Scheduler	Enables users to view and manage ***Work Orders*** using a calendar view. Launches in a new browser window.	
	Web Map	Generates a map that displays ***Lucity*** data geographically. Launches in a new browser window.	
	Time Sheet	Enables users to track the time they spend on various work tasks. If multiple time sheets are available to a user, a drop-down list appears.	
	Links	Displays a list of links to web content outside ***Lucity Web***. An administrator can customize the list for an individual or a group.	
	Notifications	Shows all of the notifications the user has received from the system during the current session. Most often, these notifications advise the user of completed ***Tasks*** or ***Toolkit*** processes. The number displayed over the icon indicates how many notifications exist. Click the X next to a notification to dismiss it.	

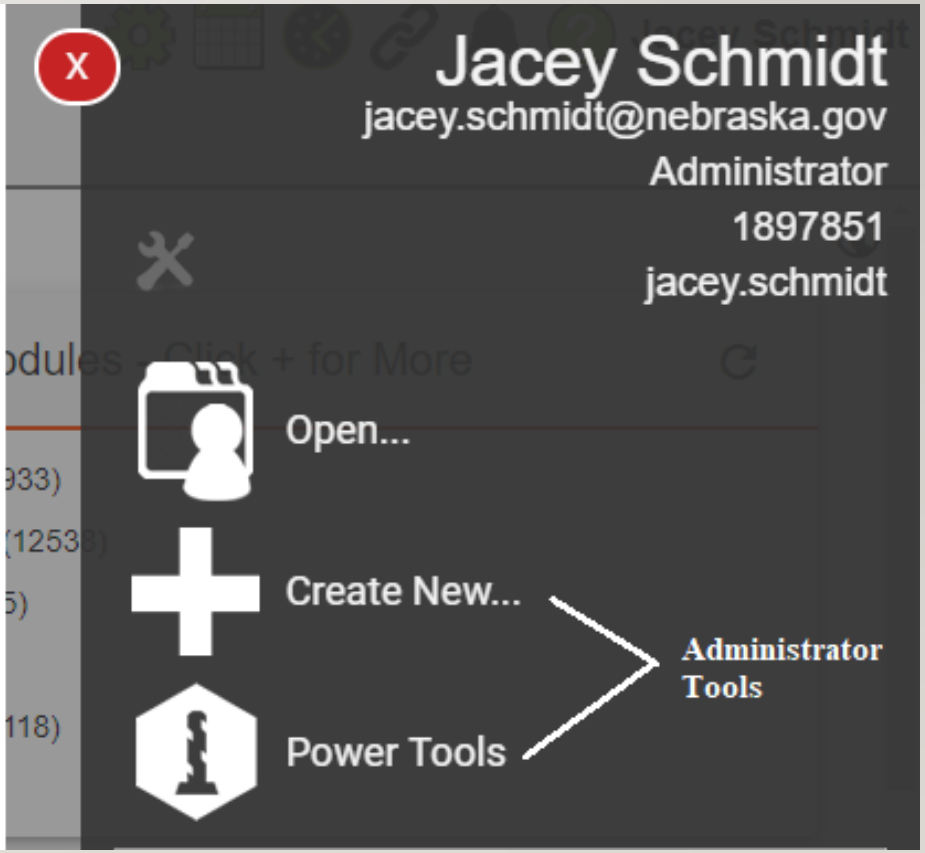
NDOT does not utilize the Time Sheet icon/functionality in Lucity.

Dashboard Layout

User Pane

The User Pane provides user and admin options and tools. It is opened by clicking on the user's name in the top right corner of the screen.

User Name: Show's the users first and last name
User's Email Address: identifies the email address linked to the user
Default User Group: indicates the default security rules group to which the user is assigned
Employee ID #: NIS/EnterpriseOne Employee ID
Login ID: displays the username for the current user. You will not need this to log in though since we use Windows Authentication to log into Lucity



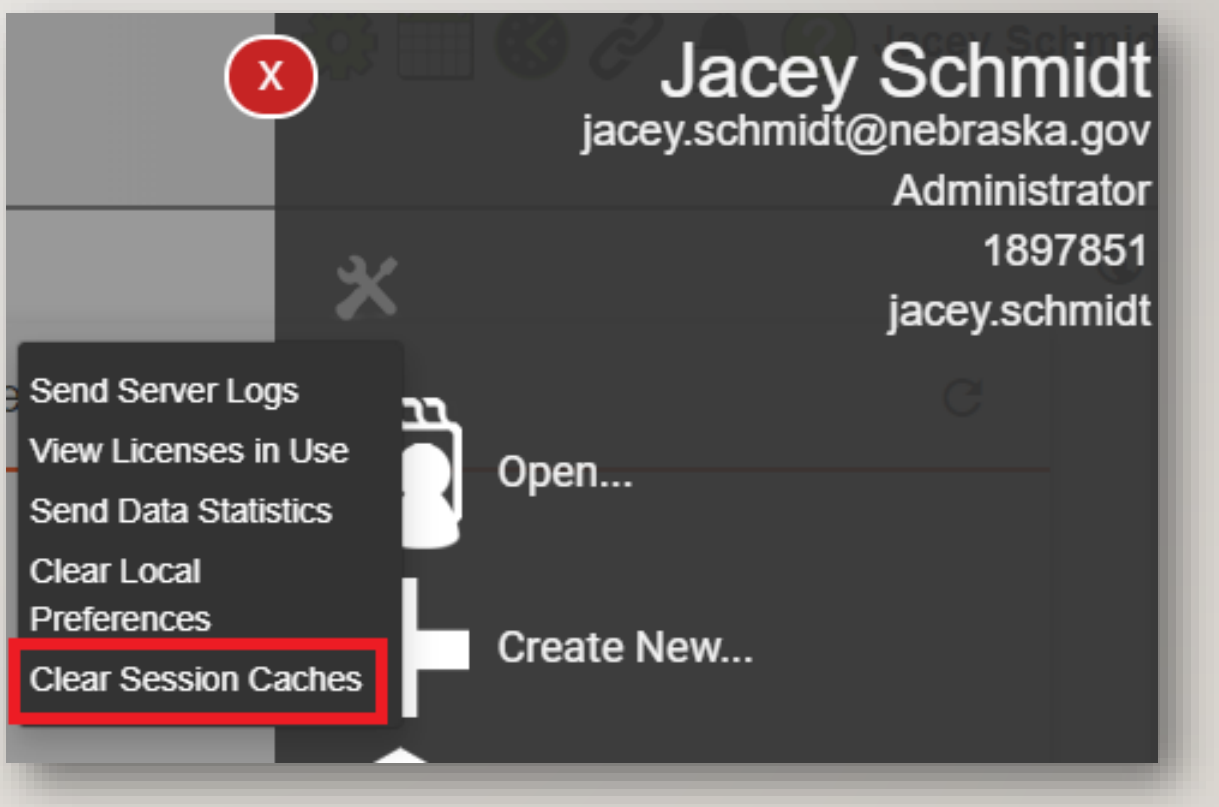
Dashboard Layout

User Pane

Troubleshooting Tools

This is where you would go to clear your session cache.

You may need to clear your cache to see an update that was made administratively in the system.
On some occasions you may also need to clear your internet browser cache to see a system update.

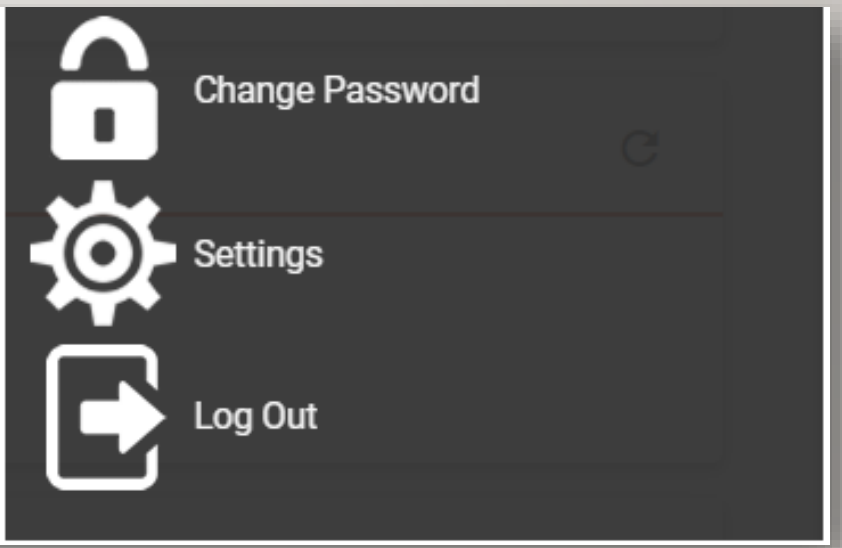


Dashboard Layout

User Pane

The User Pane provides user and admin options and tools. It is opened by clicking on the user's name in the top right corner of the screen.

Change Password: Enables users to change his or her Lucity password. Not appliable for NDOT as we use Windows Authentication to log into Lucity.
Settings: You can change the font size here.
Logout: Disconnects the user from the application and ends the session.

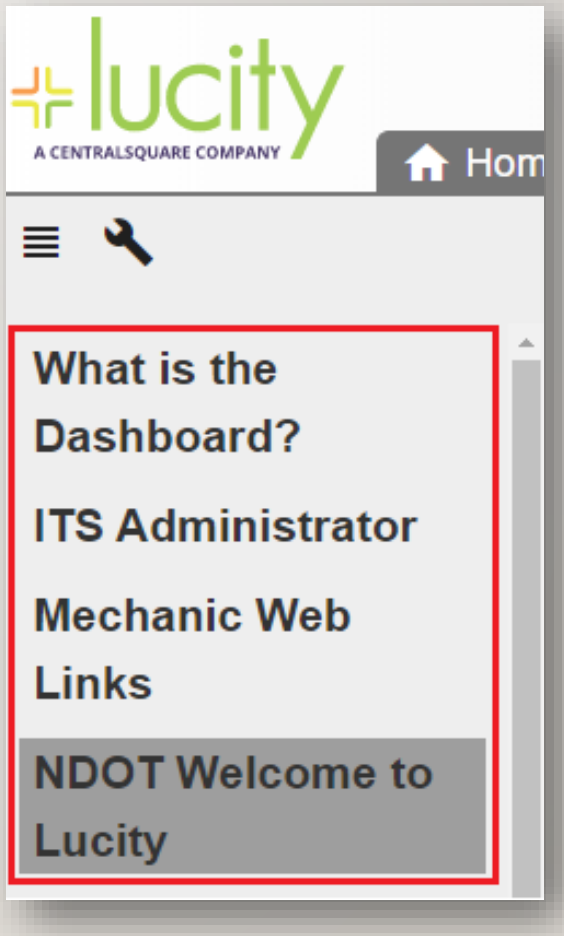


Dashboard Tabs

The Dashboard contains customized dashboard Tabs, data drills (plugins), reports, and asset hierarchy trees that have been set up to show each user's items of interest.

Dashboard Tabs- a set of related data elements made available through the Dashboard. Tabs can be customized for each user and appear on the **left side** of the screen. Click a tab to view the frames and plug-ins associated with that dashboard tab.

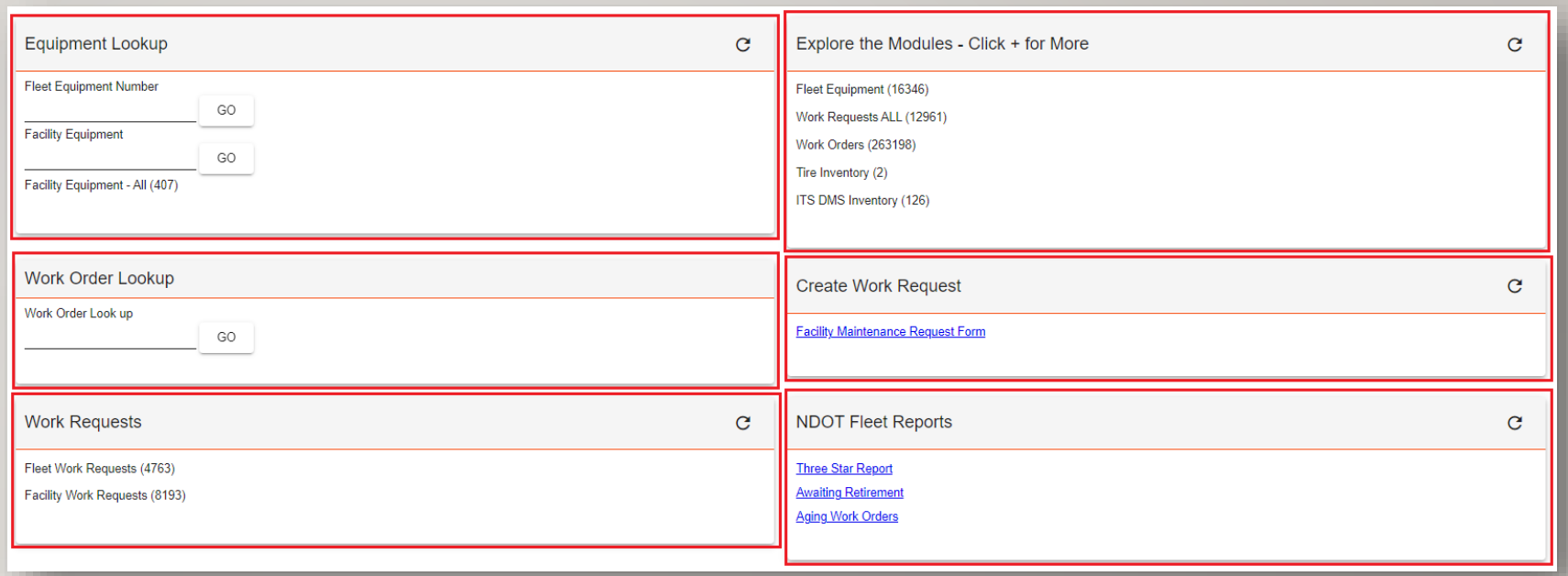
The example below is my Dashboard Tabs. Your dashboard will typically have one or two tabs.

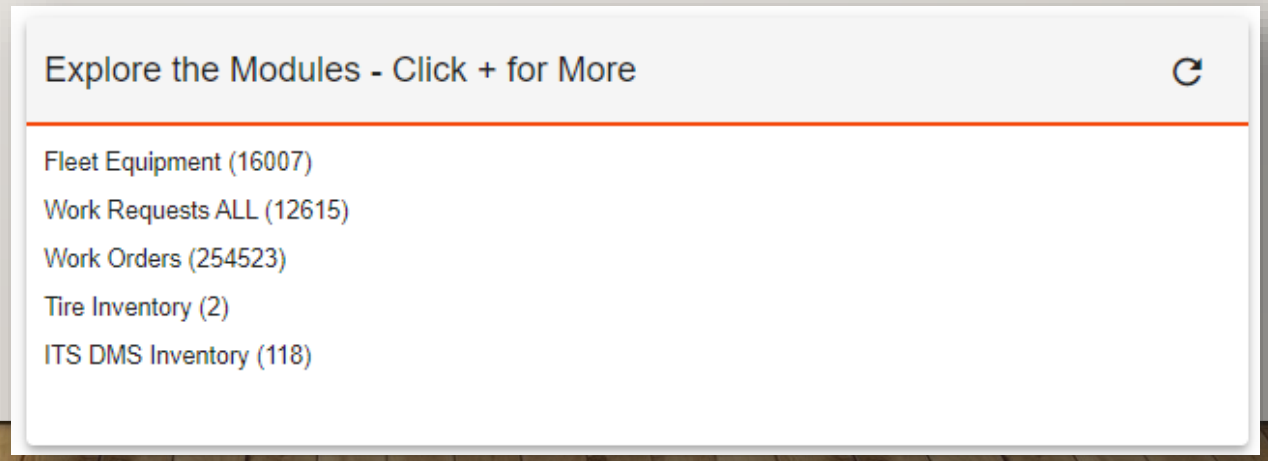


Dashboard Frames

Each Dashboard Tab is made up of Frames. This is an area on the dashboard that contains a plugin.

Each frame contains plugins to display information you need, in a useful manner. Plugins are Filtered Views (data drills) or links to Forms.

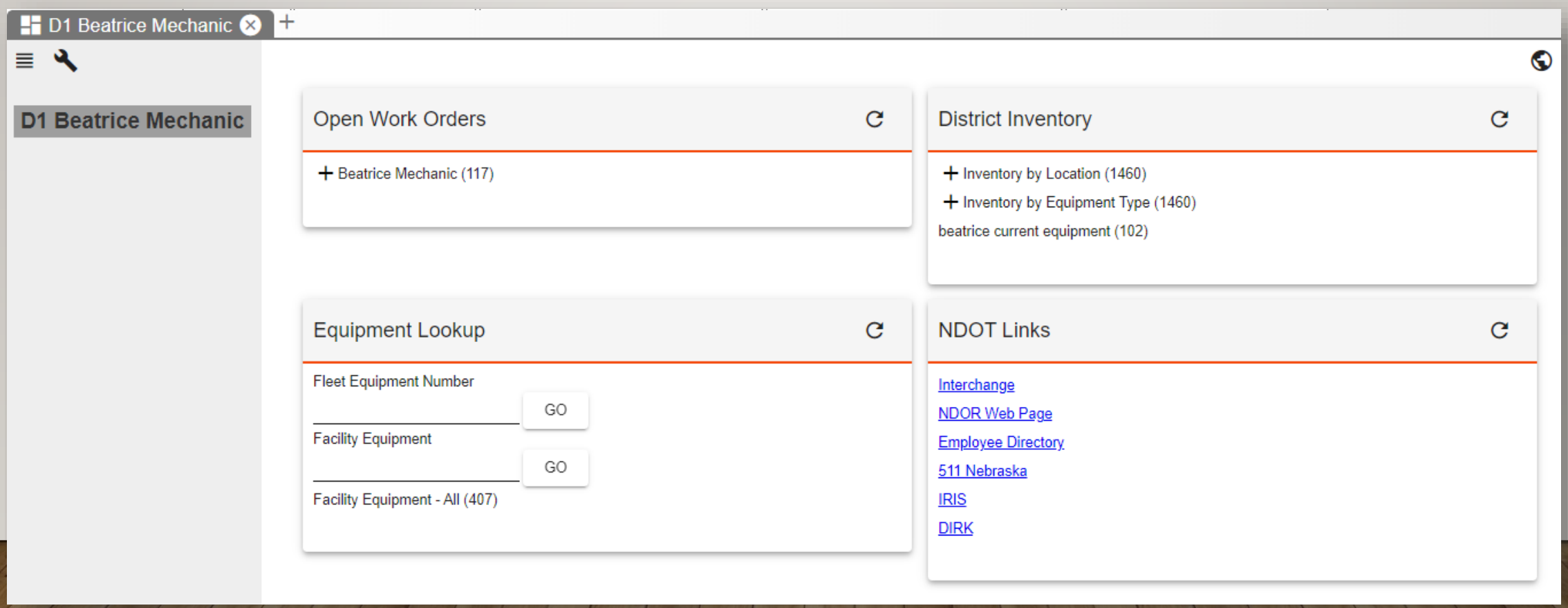




Dashboard Examples

Dashboards are created based on the work an NDOT employee does within Lucity, targeted towards job tasks and workflow.

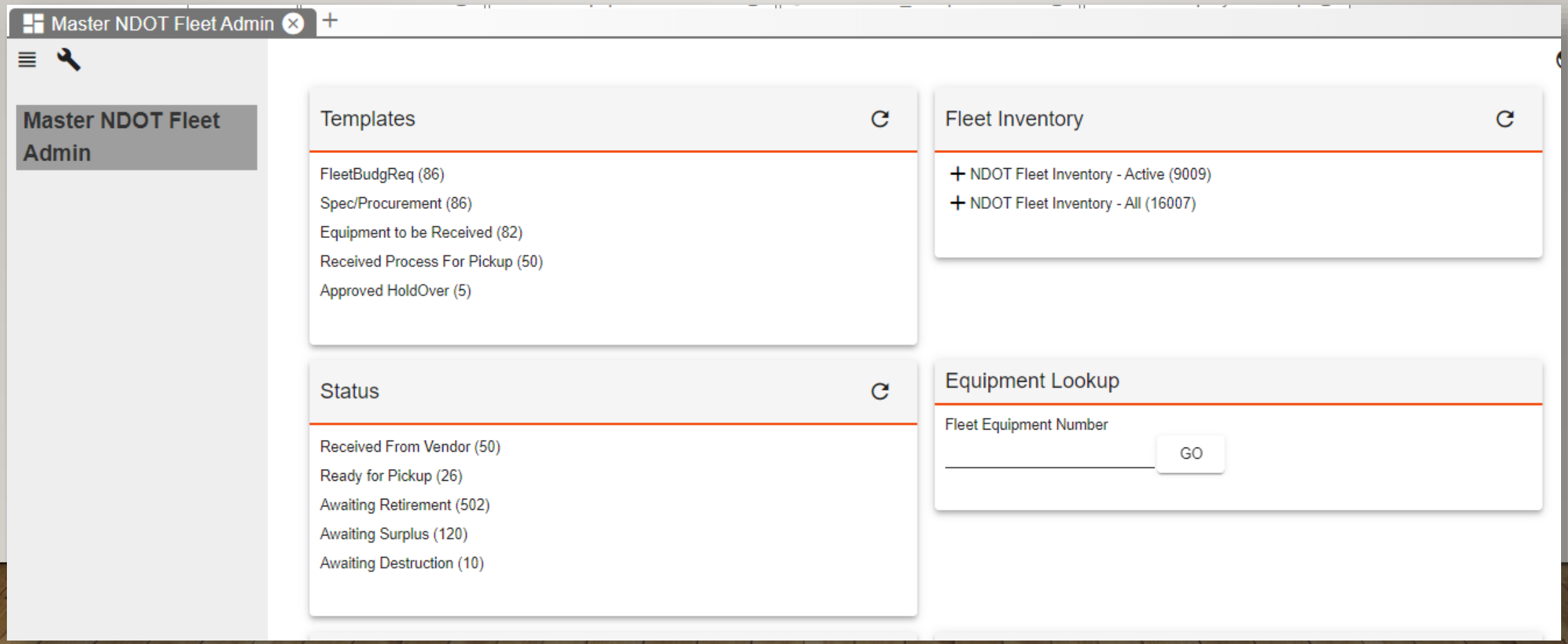
This is an example of a **Mechanic Tab** ↓



Dashboard Examples

Dashboards are created based on the work an NDOT employee does within Lucity, targeted towards job tasks and workflow.

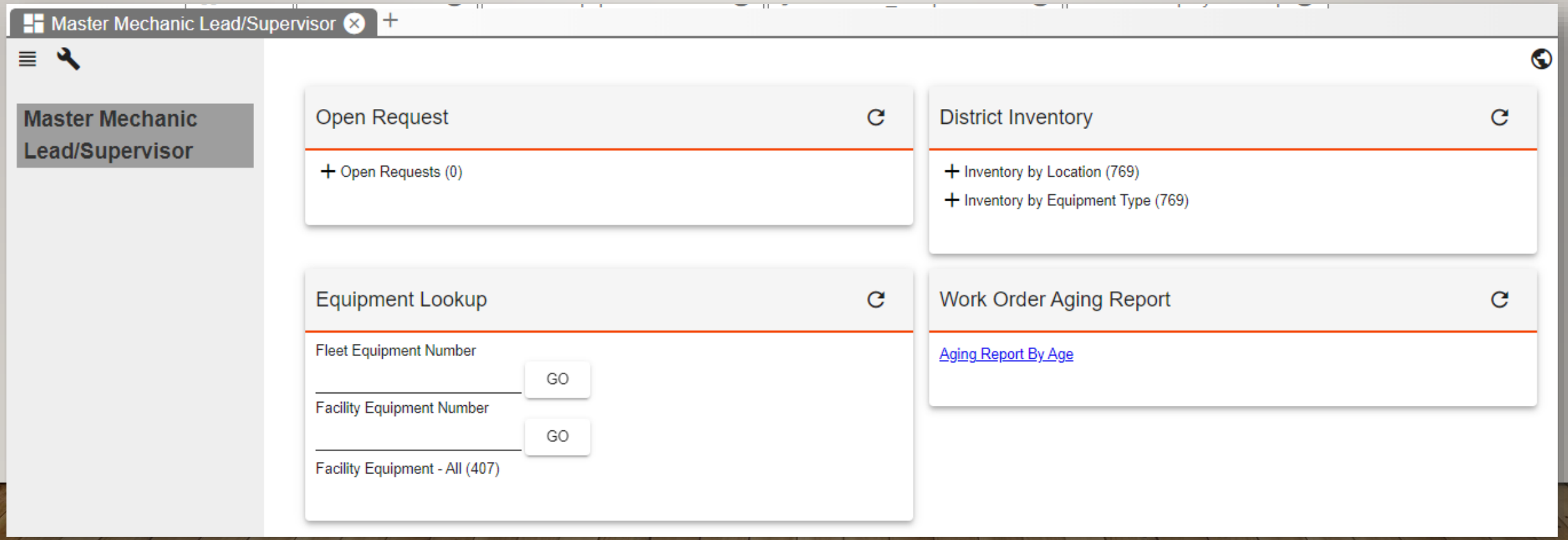
This is an example of a **Fleet Admin Staff Tab ↓**



Dashboard Examples

Dashboards are created based on the work an NDOT employee does within Lucity, targeted towards job tasks and workflow.

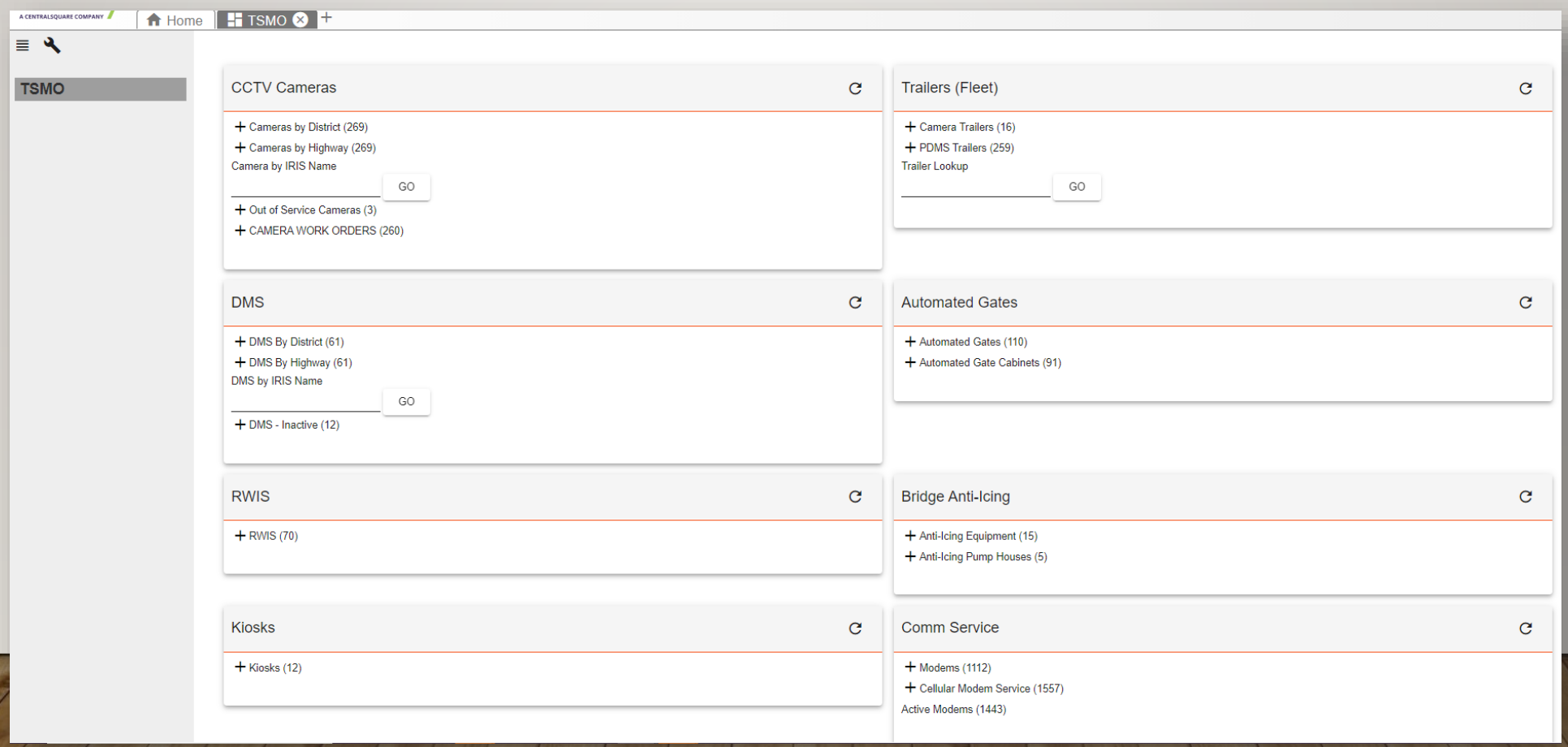
This is an example of a **Master Mechanic/Lead Supervisor Tab ↓**



Dashboard Examples

Dashboards are created based on the work an NDOT employee does within Lucity, targeted towards job tasks and workflow.

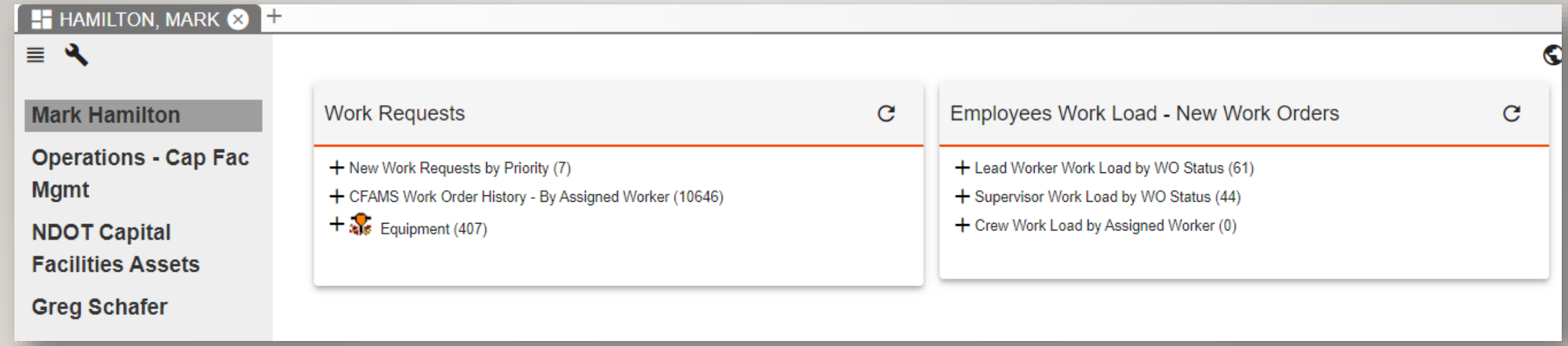
This is an example of a **Electronics Tech Tab** ↓



Dashboard Examples

Dashboards are created based on the work an NDOT employee does within Lucity, targeted towards job tasks and workflow.

This is an example of **Facility Maintenance Tabs** ↓

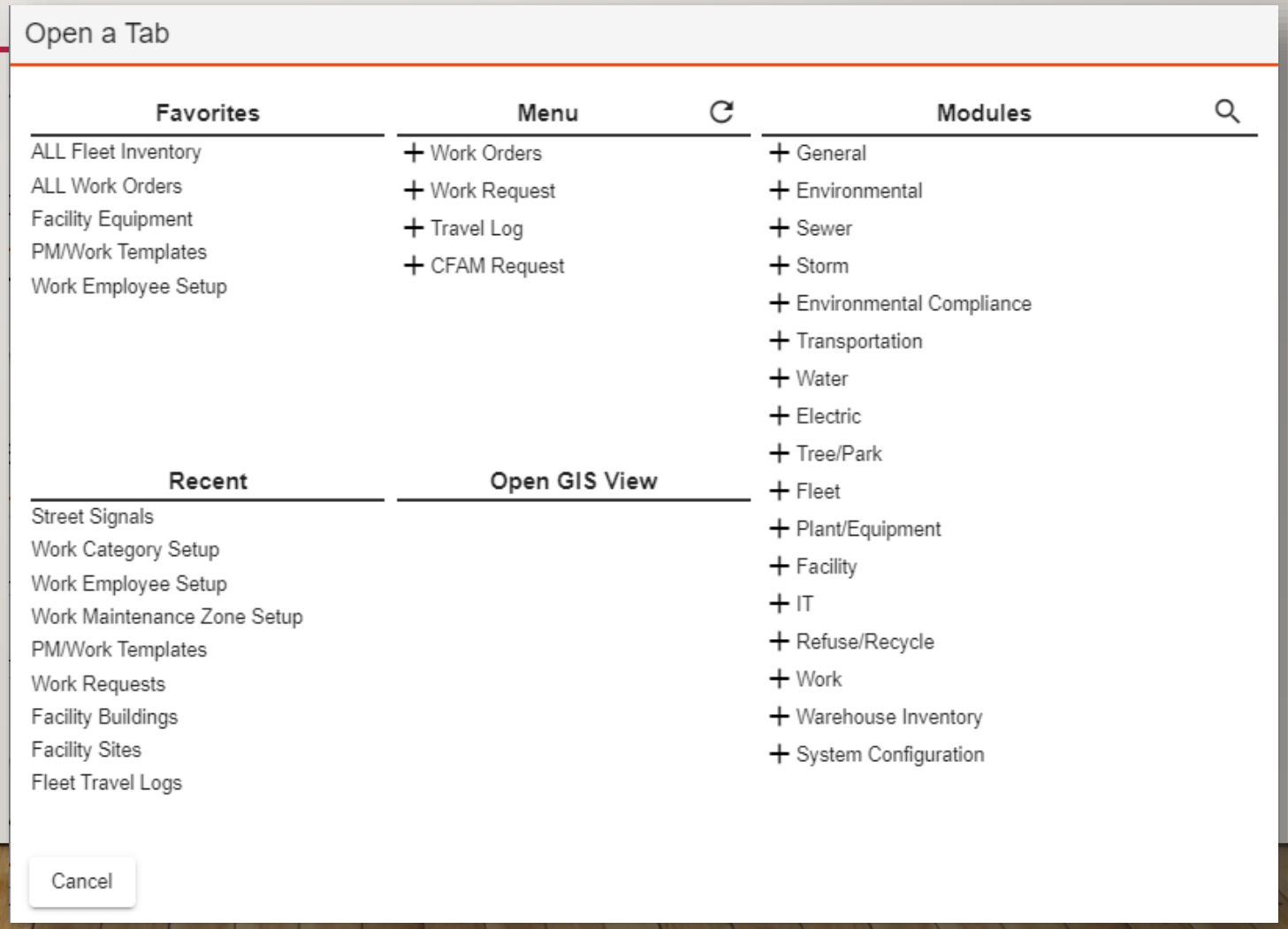


LUCITY WEB (DASHBOARD) NAVIGATION

- Chrome is the preferred internet browser for Lucity Web. Lucity 2019R2 does not support the Internet Explorer browser.
- Launch Lucity Web from the Lucity Dashboard icon on your desktop (if applicable) or from your Start Menu or on your taskbar. You can pin the Lucity Dashboard program to your start menu so you can find it easier each time you need to login.
- The **NDOT Welcome to Lucity** tab may be displayed on your screen, on the left-hand side. If not, you can add this tab to your dashboard later in this training. Some of you may already have tabs on the left side of your screen under your Home tab and some of you may not.

LUCITY WEB (DASHBOARD) NAVIGATION

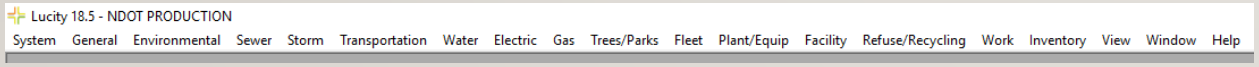
- If you have permission you can access/view all of the Lucity modules (Fleet, Facilities, Equipment, Work Orders, Transportation and ITS Communications assets/data) by clicking on the gray plus sign + next to your Home tab.

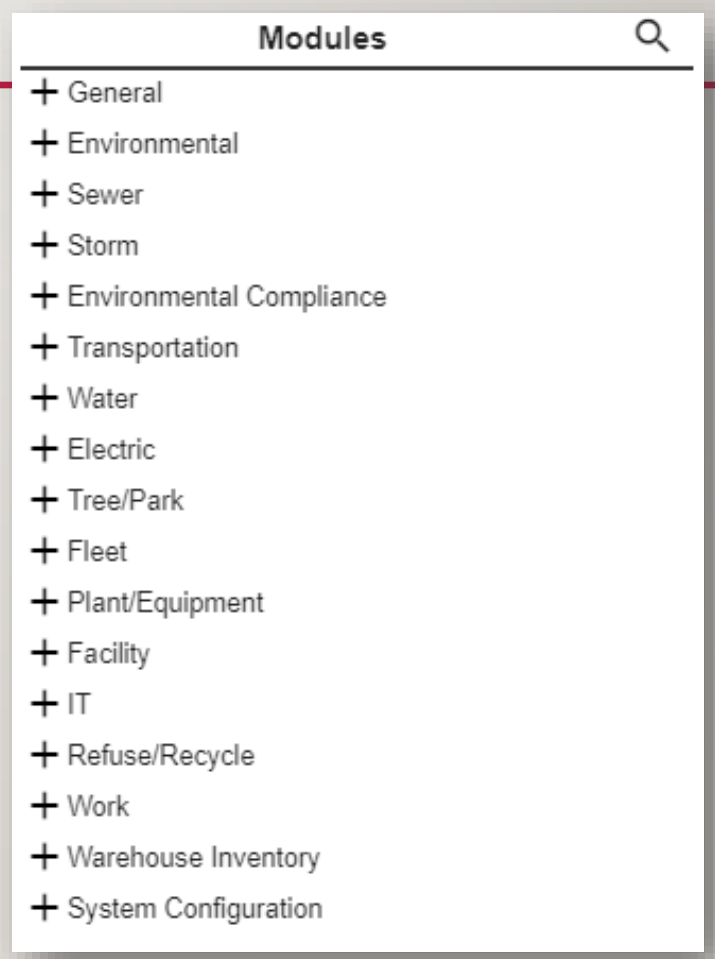


LUCITY WEB (DASHBOARD) NAVIGATION

- Close up view of the Modules area. This is equivalent to the Module area on the desktop. You can expand the module by clicking on the black plus sign +

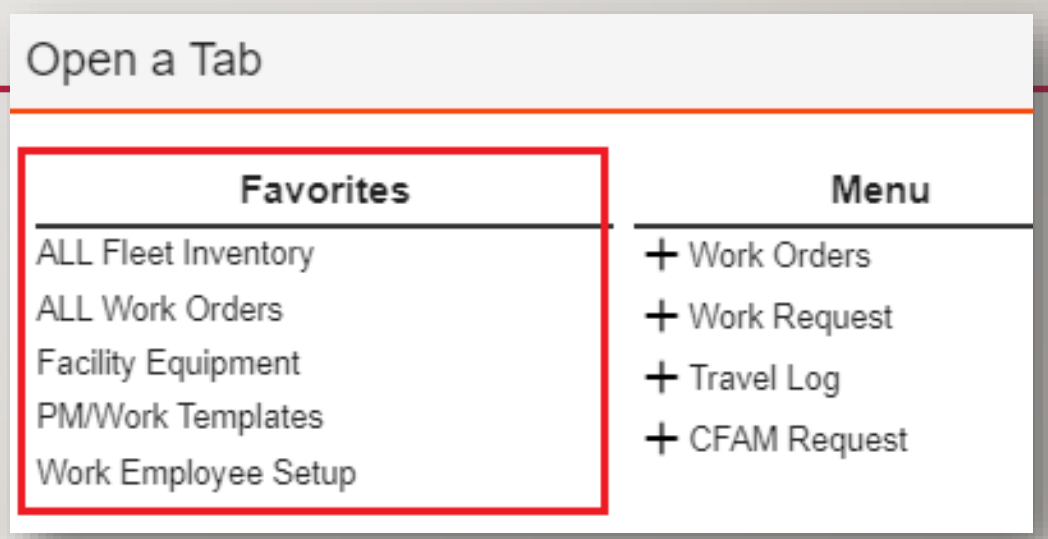
- The old Desktop module view

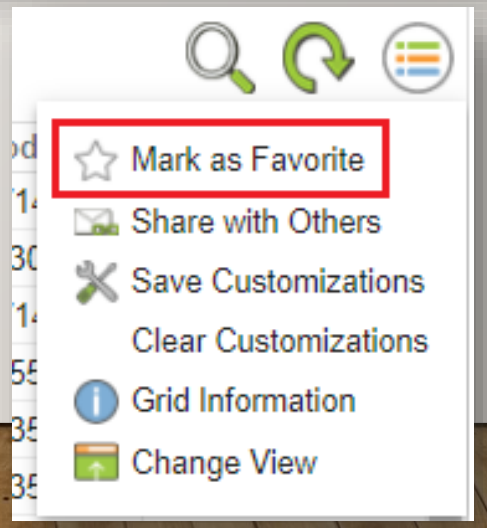




LUCITY WEB (DASHBOARD) NAVIGATION

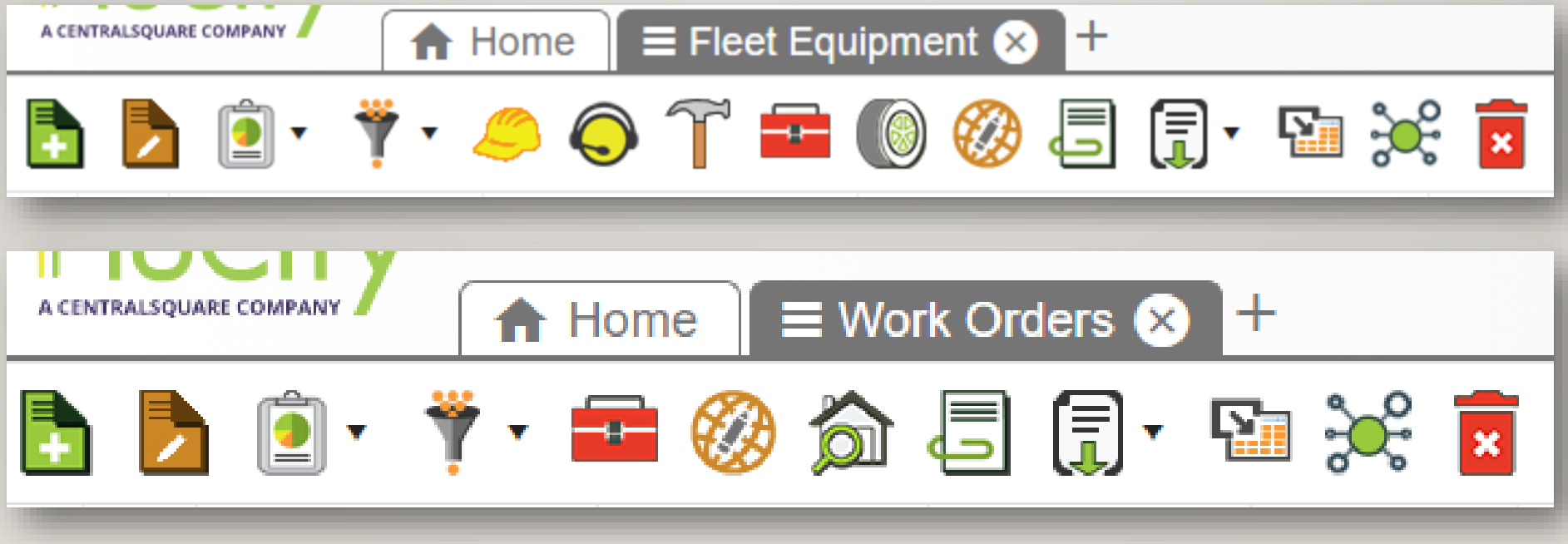
- You can add your favorite modules to the Favorite section by clicking on the Menu button from the module and select Mark as Favorite.





LUCITY WEB (DASHBOARD) NAVIGATION

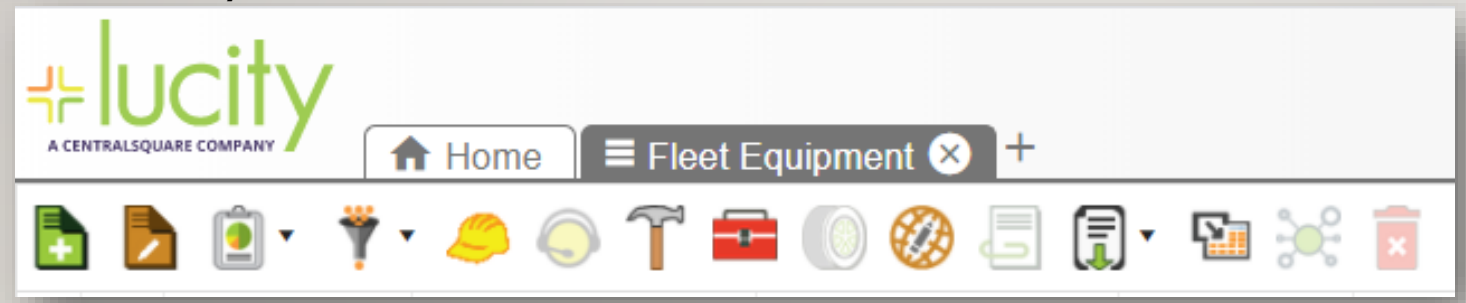
- Now lets get into the Lucity Web grids and forms. These next few slides will explain the Lucity Web icons and their functionality.*



*You may not have all of these icons under your login depending on your security permissions that were assigned to you.

LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Icons



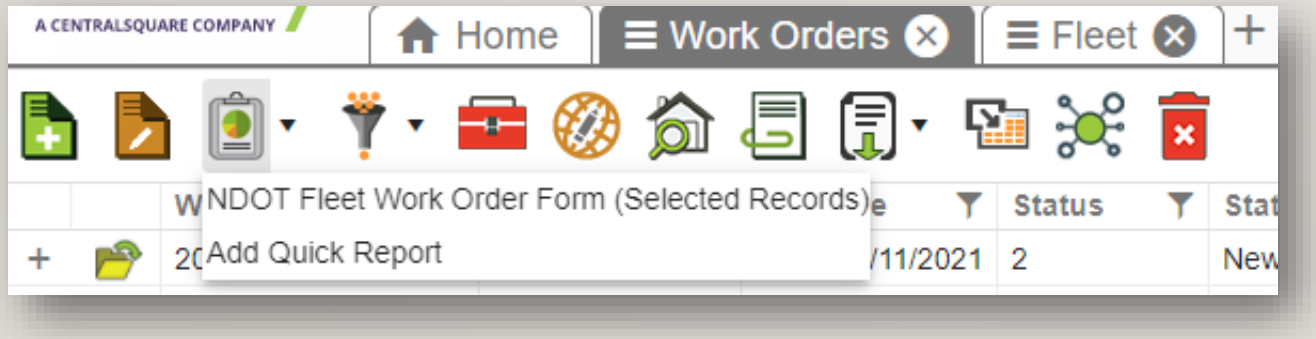
- Green + paper icon = Add (to Add a new Record)
- Brown pencil paper icon = Edit in Grid (you can edit a record from the grid)
- Clipboard = Reports, you can click on the dropdown arrow to bring up a Quick Report
- Feel free to check out the OOTB/standard reports in Lucity; however, Operations utilizes the SSRS Reporting Portal for our Lucity reporting.

LUCITY WEB (DASHBOARD) NAVIGATION

- Clipboard Icon - **Reports**

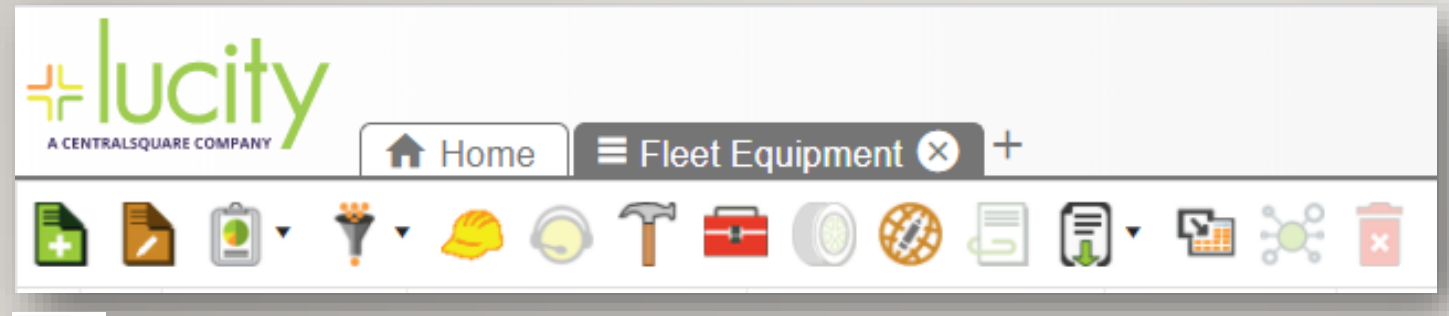
You can click on the dropdown arrow to bring up any Quick Reports you have saved.

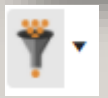
A commonly used report/form that will be under the Reports icon (in the Work Order module) is the NDOT Fleet Work Order form. Search for this report and save it as a Quick Report so you don't have to search for the form each time you need it.



LUCITY WEB (DASHBOARD) NAVIGATION

Lucity Web Icons (continued)





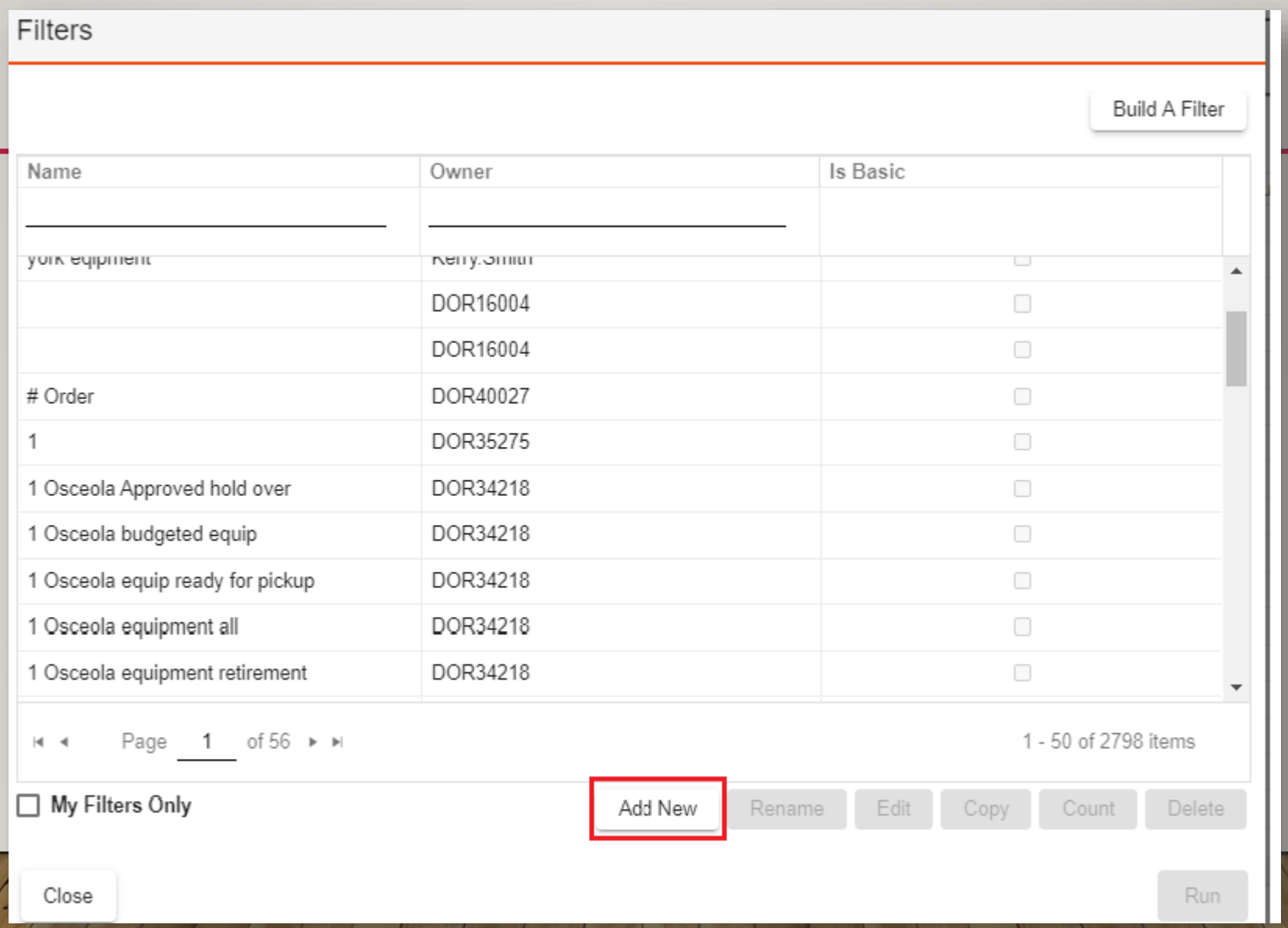
Filter Icon = Filter. Click on the little arrow dropdown by the Filter icon to bring up all the filters that you have saved. All of the filters you had in the Lucity desktop will also be in the Lucity Web. If you have been with NDOT for a while your desktop filters may be under your old DOR#. Re-save these filters so they appear under your firstname.lastname in the web.

If you click on the Filter icon itself (left side):

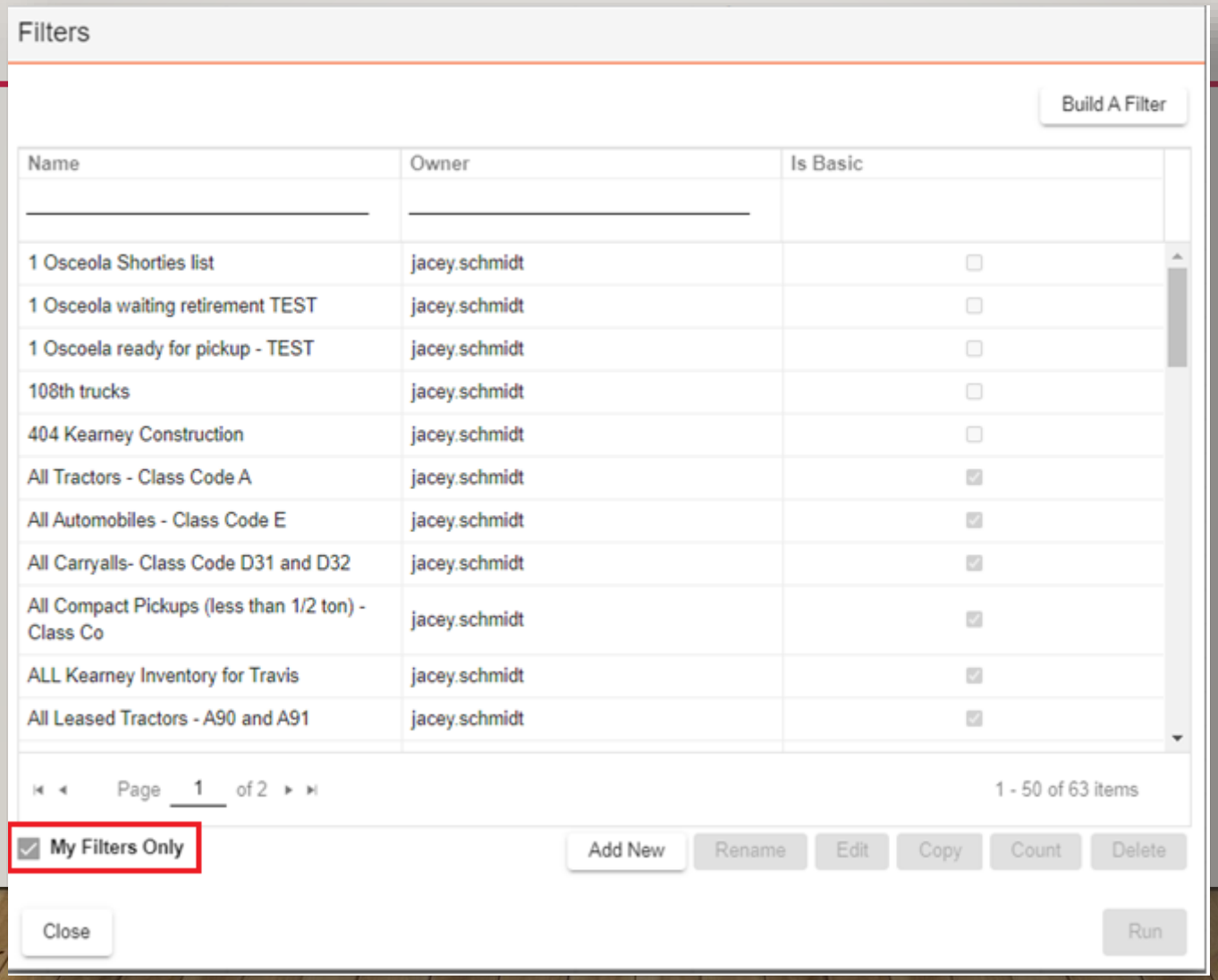
You can uncheck the My Filters Only checkbox so you can see ALL of the filters in that module, OR you can Add/Build a New Filter.

Watch the Lucity Web Filtering video under the Lucity Training Videos frame on the NDOT Welcome to Lucity tab to learn more about how to create a filter in the web. If you need assistance with creating or editing your filter, feel free to contact NDOT Operations Lucity Support.

LUCITY WEB (DASHBOARD) NAVIGATION

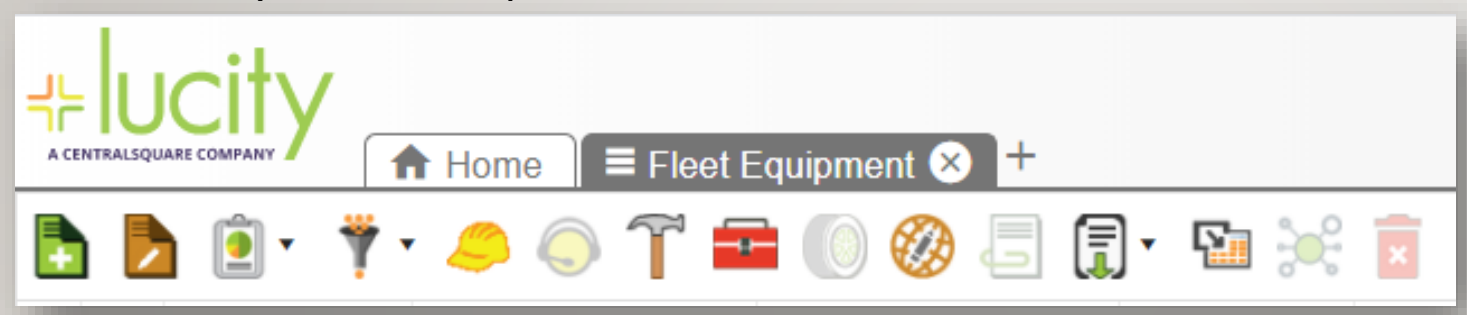


LUCITY WEB (DASHBOARD) NAVIGATION



LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Icon Explanation



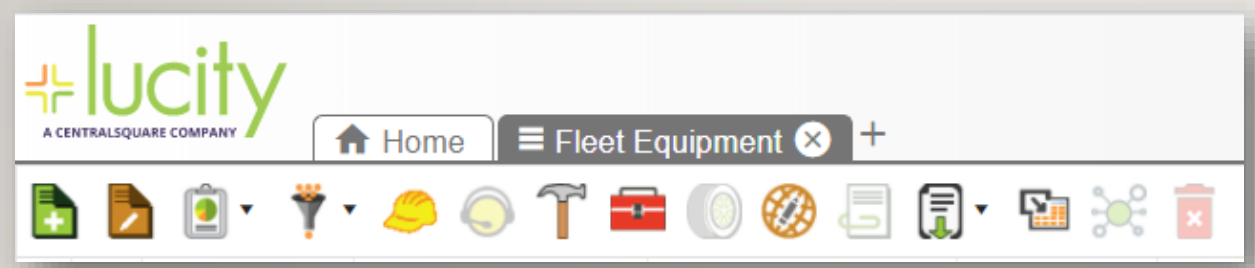
Create a New Work Order icon = Create a New Work Order, You need to make sure you're in the actual Equipment record if you want to create a WO for a particular vehicle, equipment, facility, traffic signal or ITS device, etc.

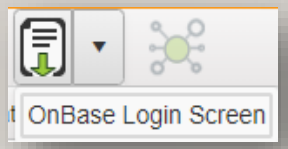
Create a new PM/Template icon = Create a new PM/Template (completed by Fleet Management for the Fleet module)

Toolkit = Most casual and general Lucity users will NOT be using any features in the toolkit for the Fleet module.

LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Icon Explanation





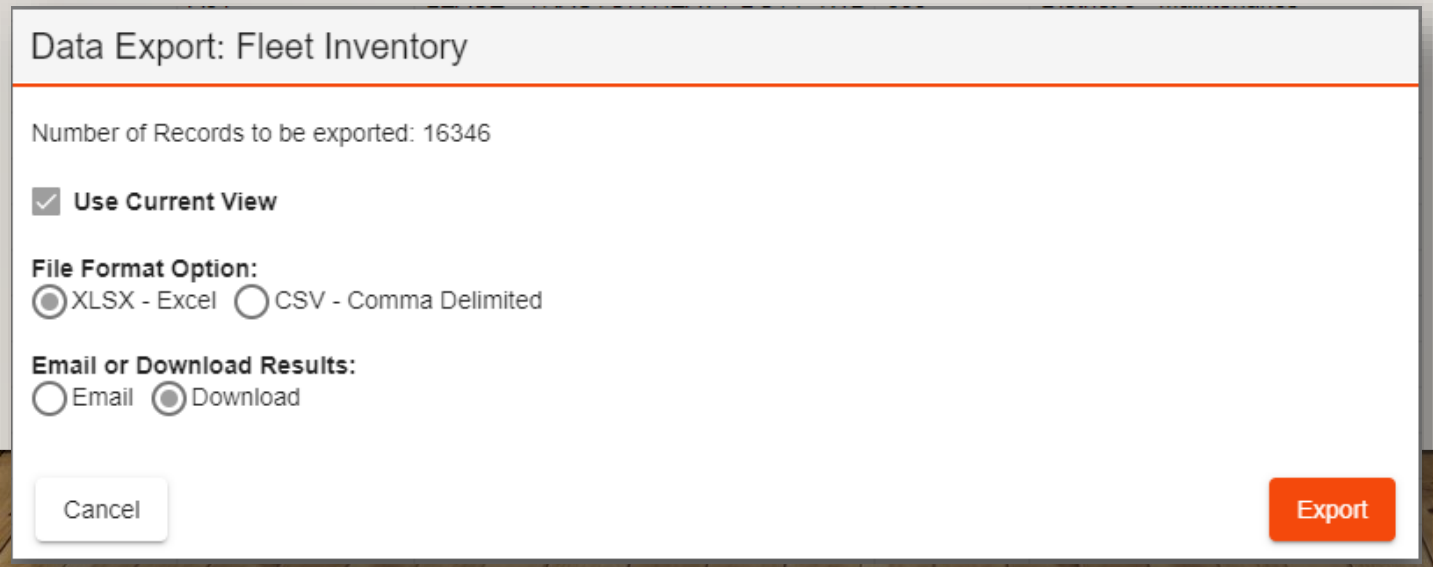
External Documents = click on the small arrow next to the external documents icon to bring up the OnBase Login Screen button. Click on the OnBase Upload Documents button to open the documents that are scanned in OnBase associated with the Lucity record.

Documents – this attachment icon will be orange if there is an attachment for the record. Otherwise, it will be white. If there is a document that was uploaded locally to the record this icon will be orange. You can upload documents directly to Lucity from this Documents icon.

LUCITY WEB (DASHBOARD) NAVIGATION

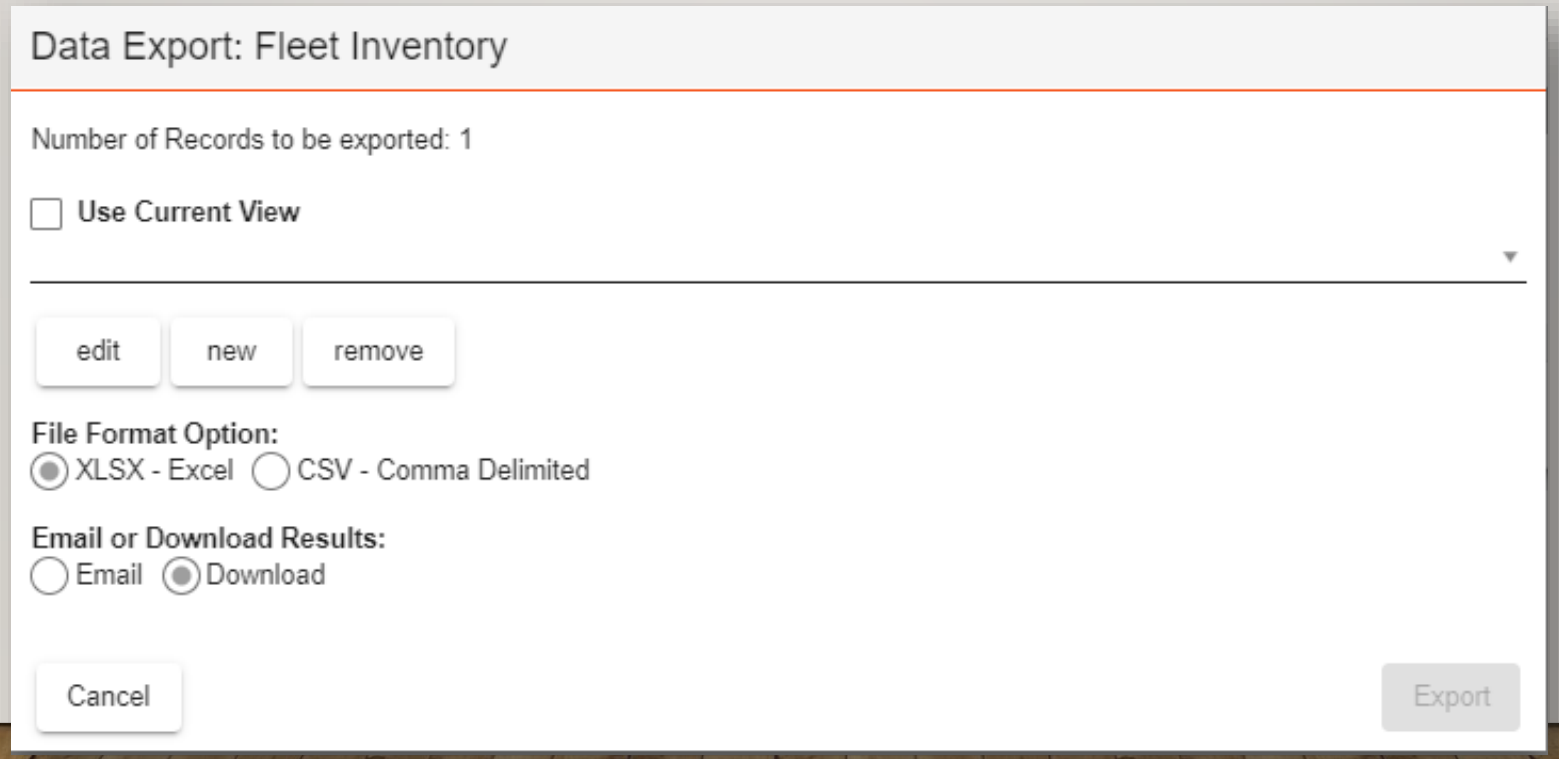
- Lucity Web Icon Explanation

Data Export icon = Data Export, you can export data directly from the grid for your convenience to review the data or to use for reporting, etc. Choose the file format option of CSV if you are exporting more than 1,000 records. You can export the current view on the grid or create a new data export where you can pick and choose the fields that you need to export. You can email the data export to yourself or download it. Click the Export button when you have made your selections on the data export screen.



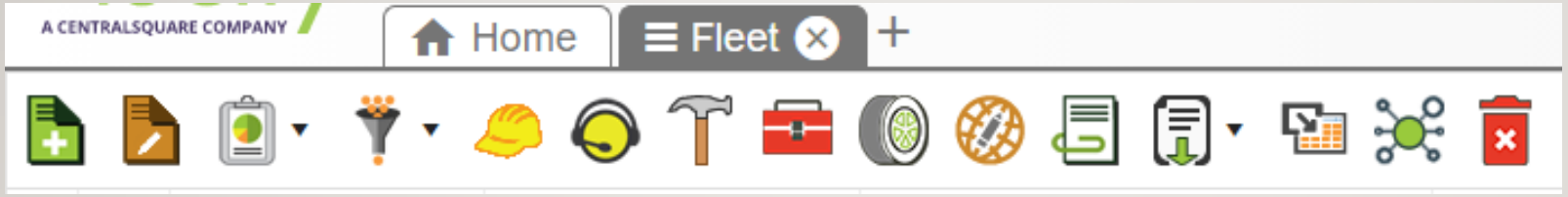
LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Icon Explanation – Data Export (continued)

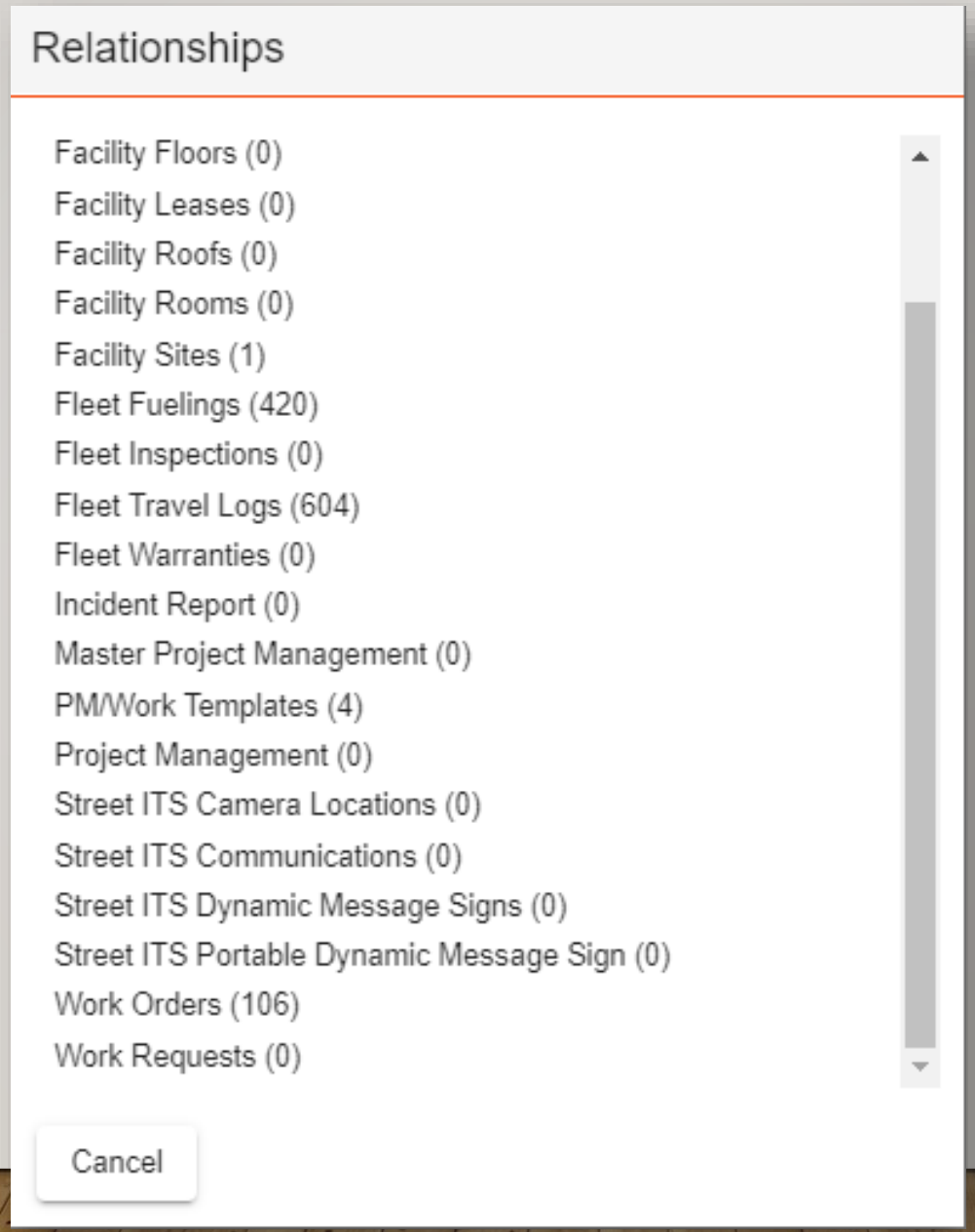


LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Icon Explanation



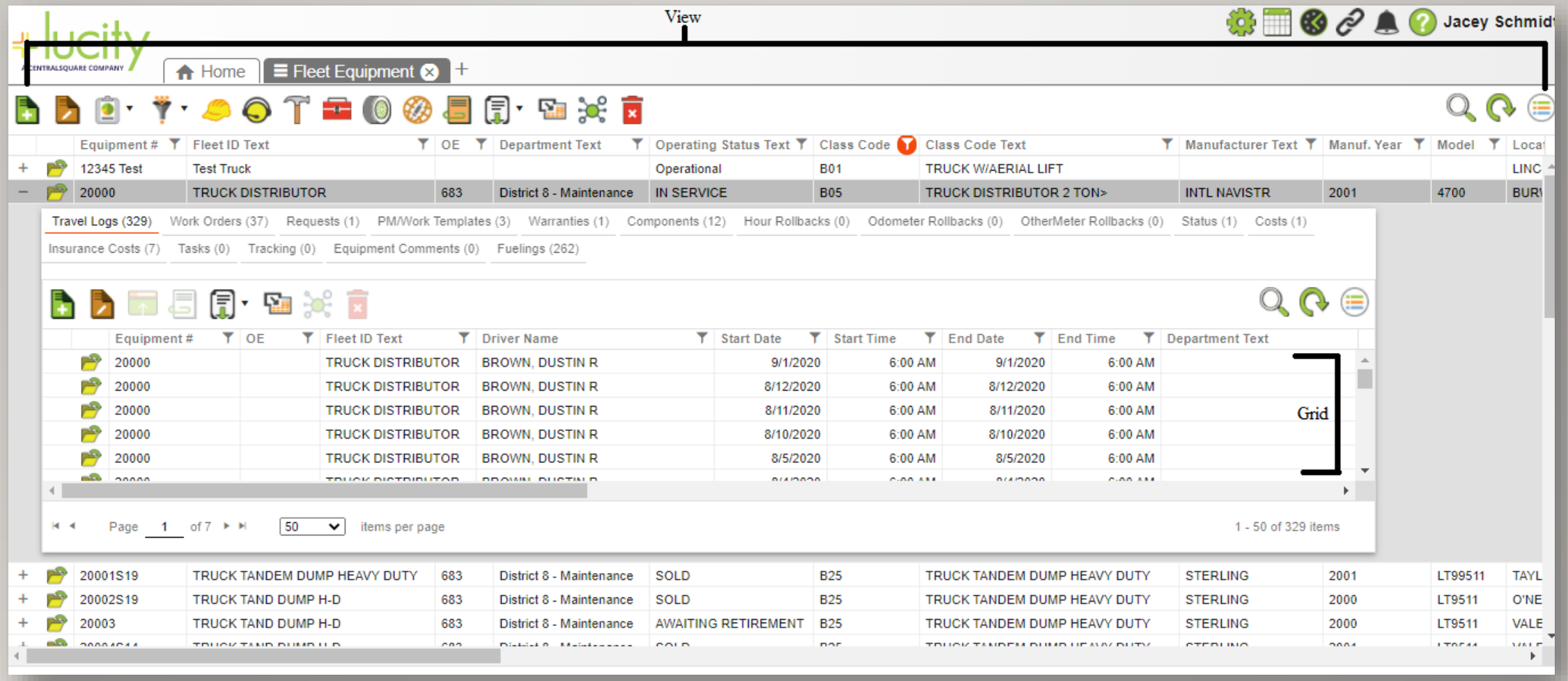
Relationships- allows you to jump to the other records in the other modules that are related to that record. For example, you can highlight a Fleet Equipment record and you can click on the Relationships icon and it will bring up the other modules that are associated to that record. See the next slide for an example.



This example is for Equipment #10002. You can see all of the other records from the other modules associated with this Fleet record. Simply click on the link to view the associated records.

LUCITY WEB (DASHBOARD) NAVIGATION

- The Lucity Web is 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.
  - **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 application tab. Forms may be tied to a grid or used alone as Request Submittal forms.



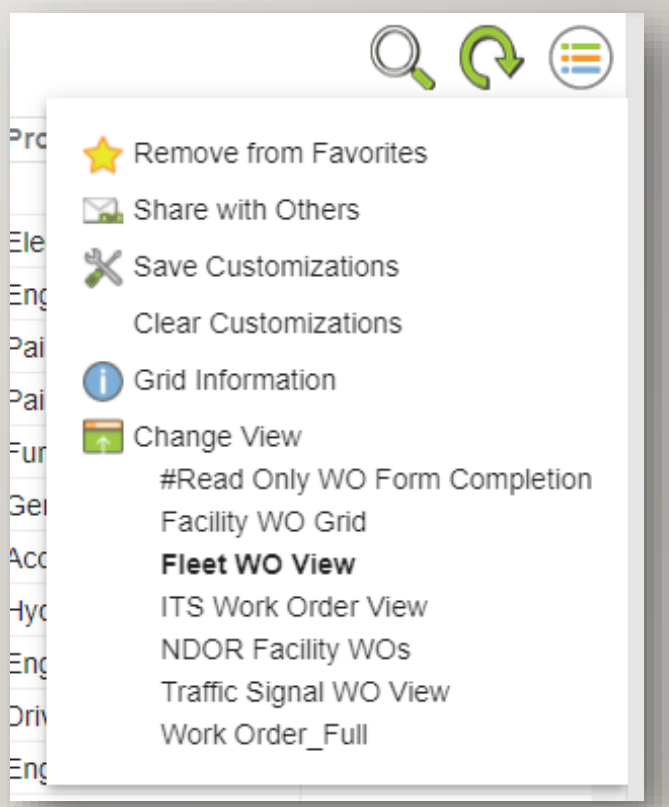
Search – opens a search box that allows you to search the grid.

Refresh Grid – Re-queries the database and refreshes the data on the page.

Menu – where you can **Mark as Favorite** for a module, Share with Others, **Save Customizations** on your grid, **Clear Customizations, Grid Information, Change View**

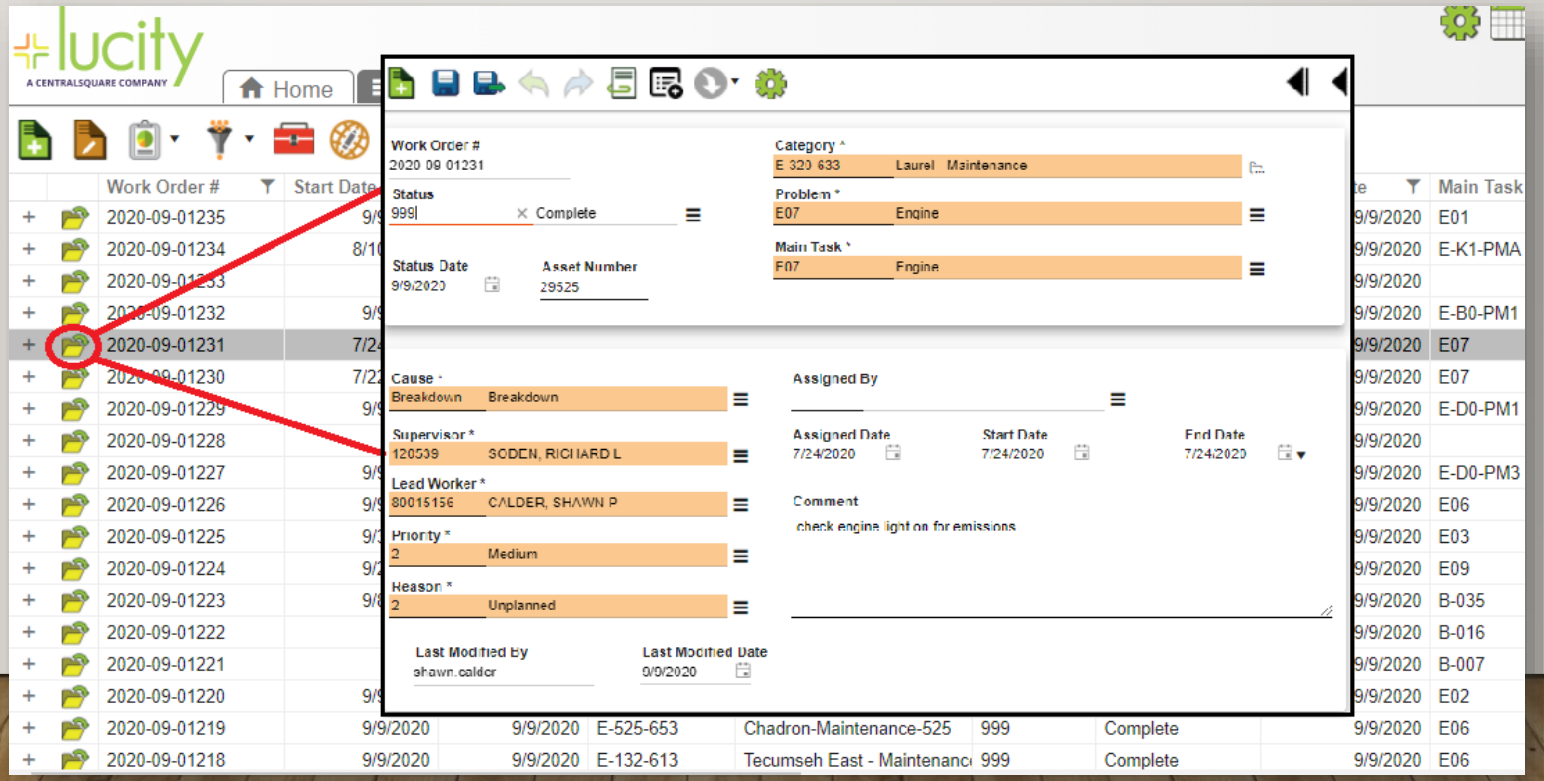
LUCITY WEB (DASHBOARD) NAVIGATION

If you're in the wrong view for your work orders you can check this by clicking on the Change View under the Menu icon. Whichever view is highlighted is the view you're currently on. Select the correct view that you want/need. Make sure you change the view from the grid, before you try and open the Work Order form.

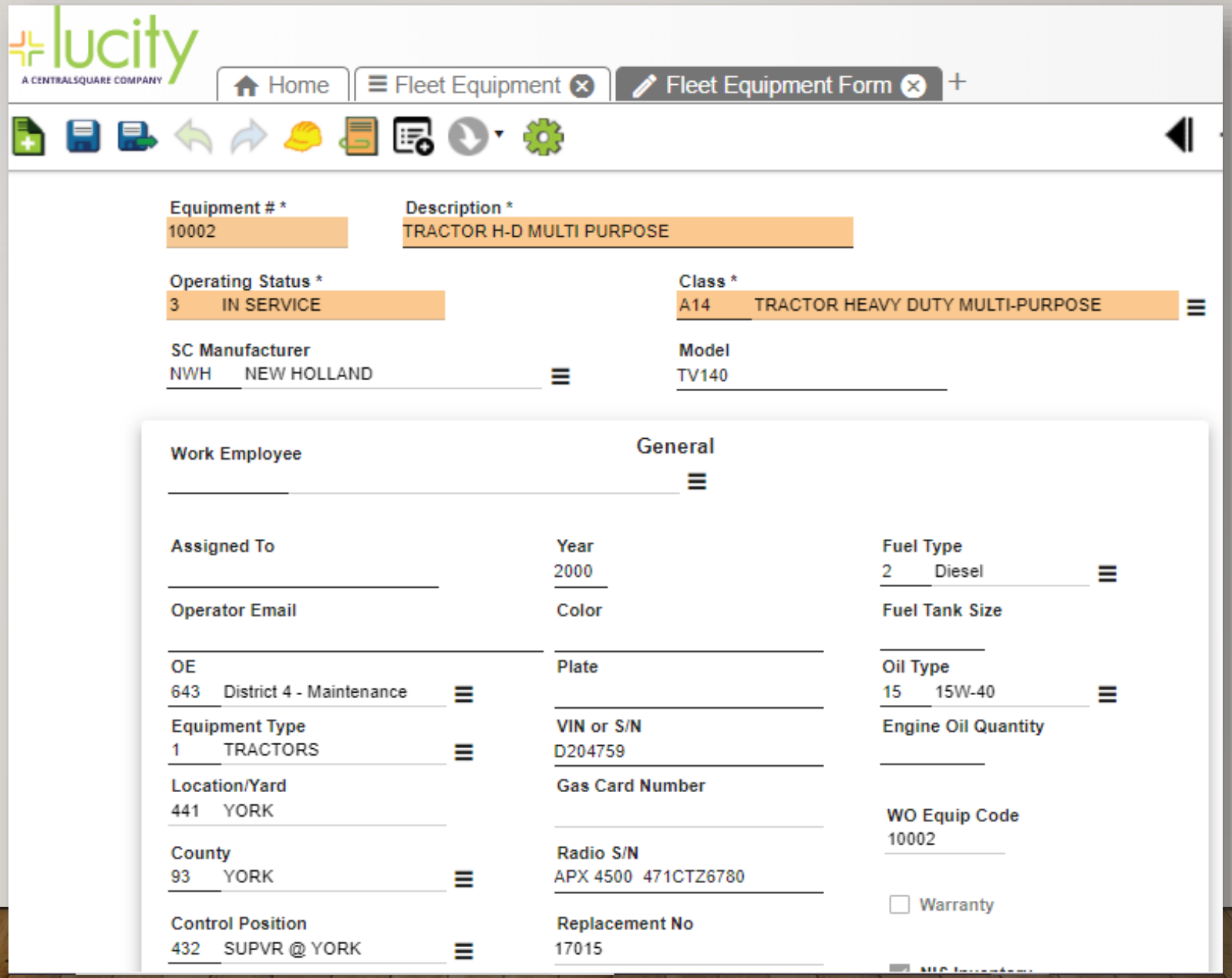


LUCITY WEB (DASHBOARD) NAVIGATION

- Click on the Folder icon to open the Form for the record. This allows you to see more detailed information. Most forms also allow you to edit attribute information for a record.

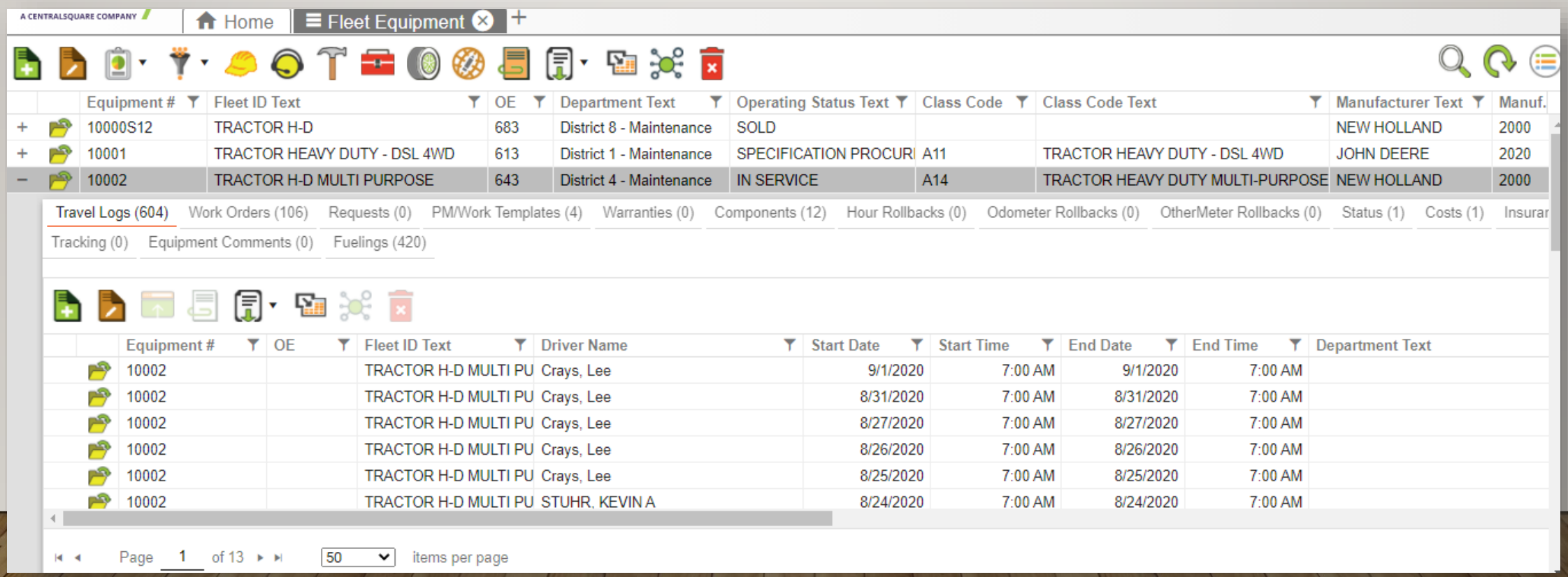


Fleet Equipment Form Example



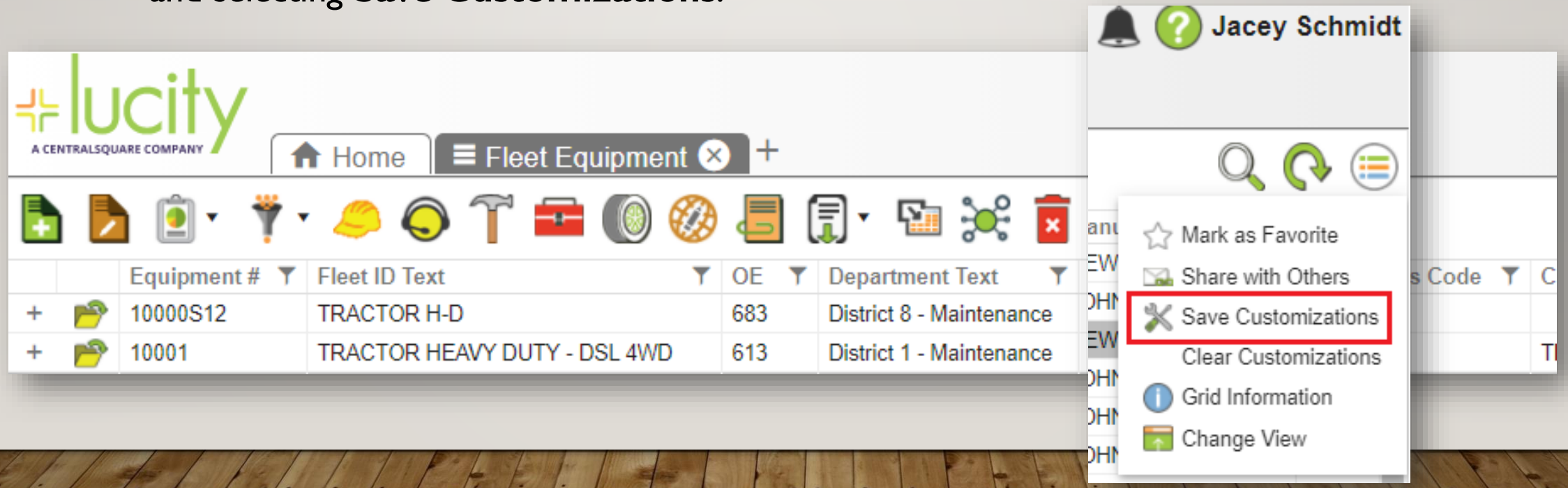
LUCITY WEB (DASHBOARD) NAVIGATION

- Click the gray + sign + next to the record to display the information you use to see on the tabs in the Lucity Desktop.



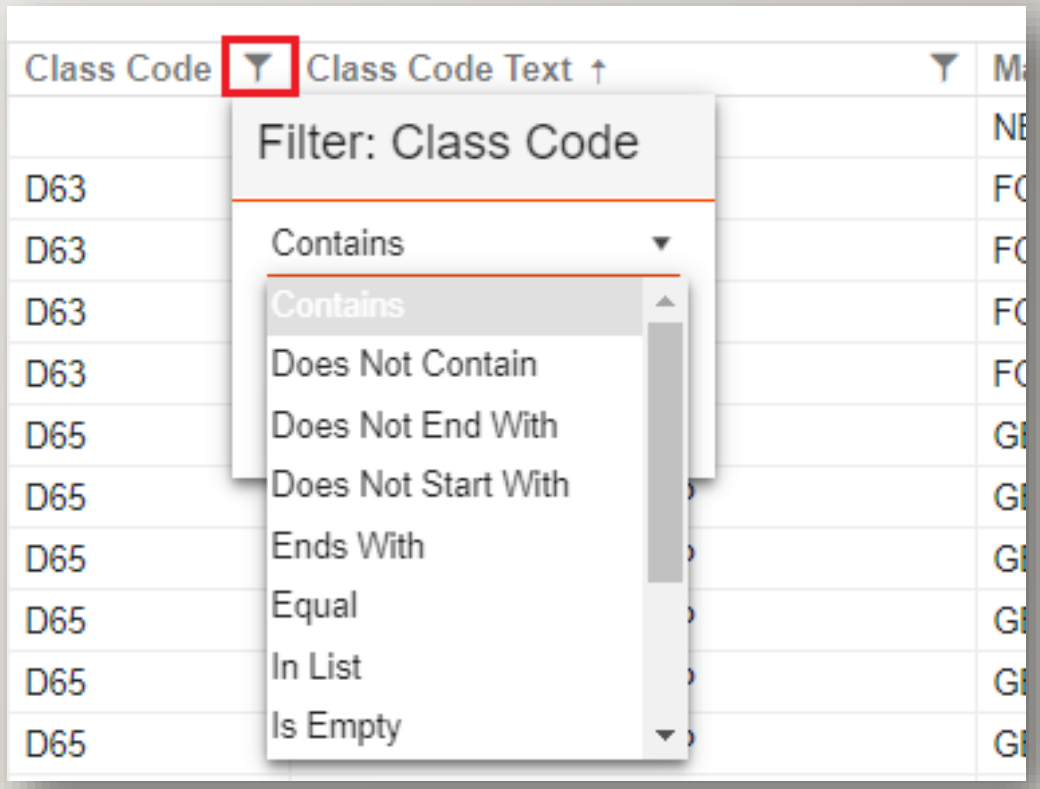
LUCITY WEB (DASHBOARD) NAVIGATION

- The fields displayed within a View are called a grid – they are customizable. You can re-arrange the columns on the grid and save the changes by clicking on the Menu icon and selecting **Save Customizations**.



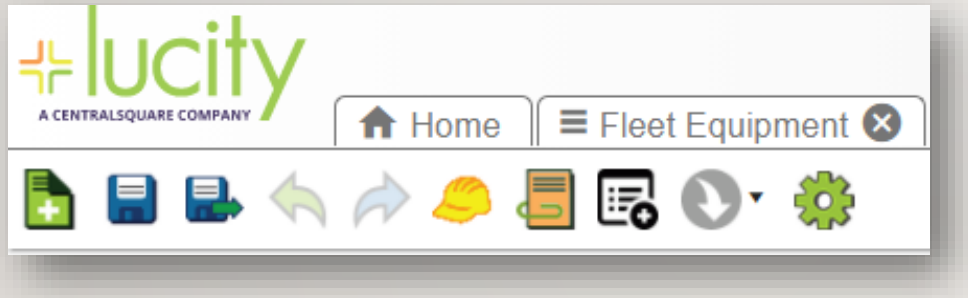
LUCITY WEB (DASHBOARD) NAVIGATION

- On the grid, you can sort information in the view by clicking on the column heading. The first click will sort the column in ascending order, the second click in descending order and the third click will remove the order. The system will support multiple column sorts at a time. You can also stretch a column's width to see the entire text of a cell.
- You can also filter the data from the field by clicking on the "funnel" icon in the field box. Click Apply when you have chosen your filter. Don't forget to clear the filter when you are done if you don't always want it there.



LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Form Icon Explanation



Add a New Record (to Add a new Work Order or Add a new Record) – most Lucity users will not be able to add a new record(s).

Save – Saves all changes. This icon becomes enabled when you edit the form.

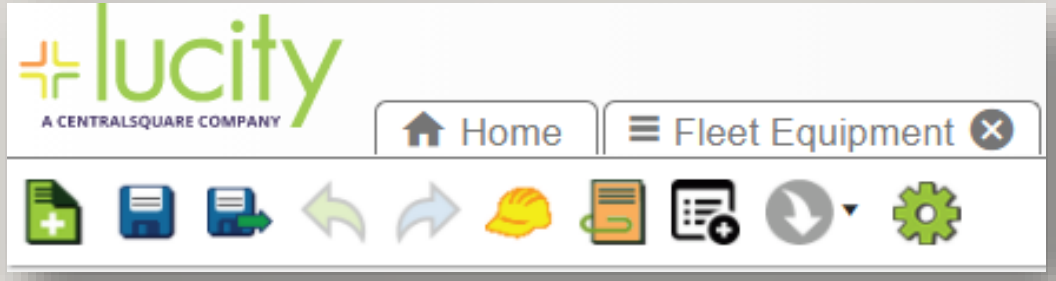
Save and Close – Saves all changes and closes the tab (form).

Undo – Undo's the changes you made.

Create a New Work Order – you can create a WO directly from the equipment/asset form. This is preferred, so the correct equipment/asset is tied to the work order (WO).

LUCITY WEB (DASHBOARD) NAVIGATION

- Lucity Web Form Icon Explanation



Documents – this attachment icon will be orange if there is an attachment for the record. Otherwise, it will be white. If there is a document that was uploaded locally this icon will be orange. You can upload documents directly to Lucity from this Documents icon.

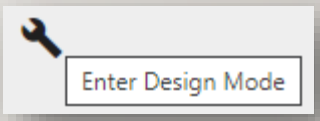
Field Property Modification – only system administrators can make edits here. Other users (e.g. casual and general users) can only view this information.

Carry Over – the carry over button allows users to quickly enter repetitive data for multiple records.

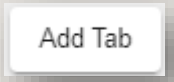
Field Property Information – Gives you the field information for the field

HOW DO I SET UP MY DASHBOARD?

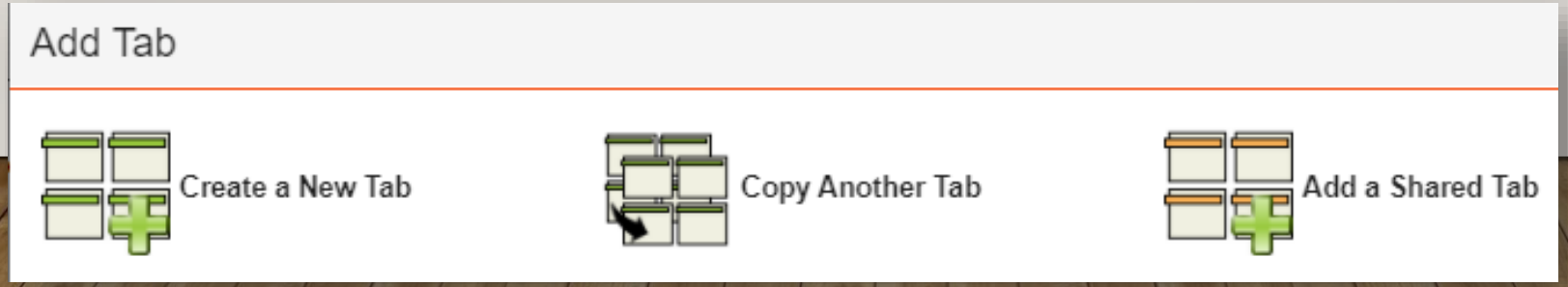
1.) As mentioned in slide 20, we will go through the steps of adding the **NDOT Welcome to Lucity** Tab to your dashboard.

2.) To create/set up your dashboard click on the **Enter Design Mode** wrench 

from your Home tab.

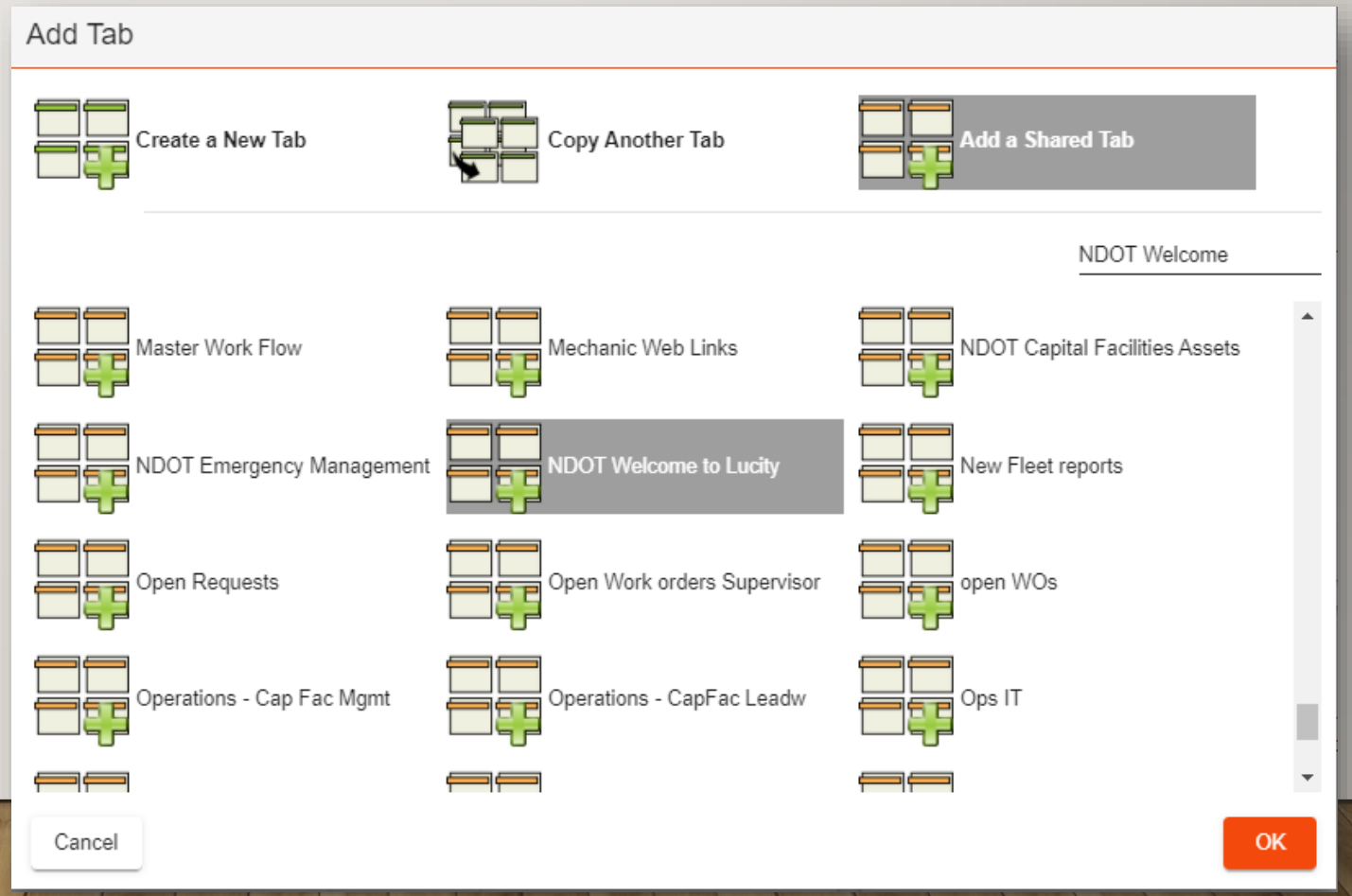
2.) Click on the **Add Tab** button 

3.) Select the **Add a Shared Tab** option to add a tab that has already been created. Click OK. Select the **Create a New Tab** option if you want to create a new tab for your dashboard. If you want to copy another tab that has already been created select the **Copy Another Tab** option.

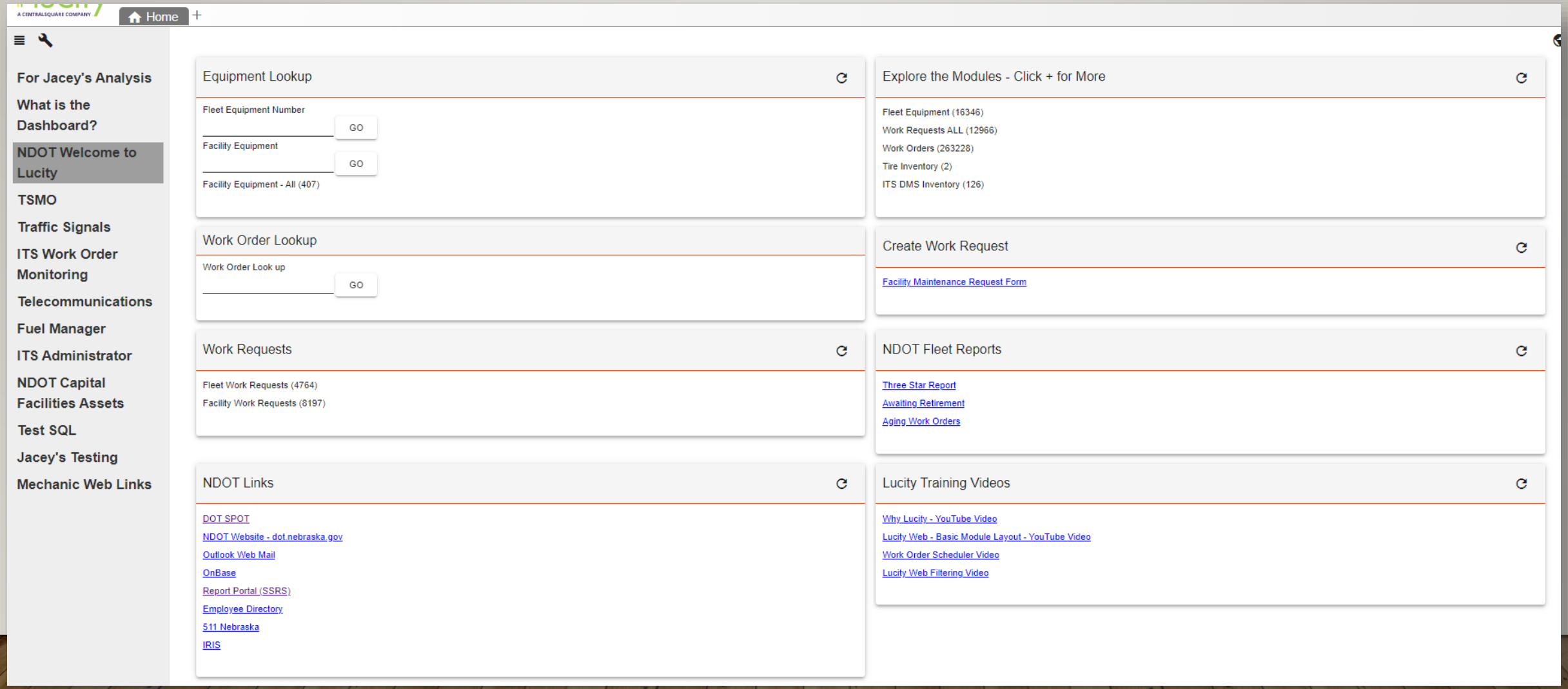


HOW DO I SET UP MY DASHBOARD?

4.) Select **Add a Shared Tab** to add the **NDOT Welcome to Lucity** tab. Select the tab and click on **OK**.



The NDOT Welcome to Lucity Tab

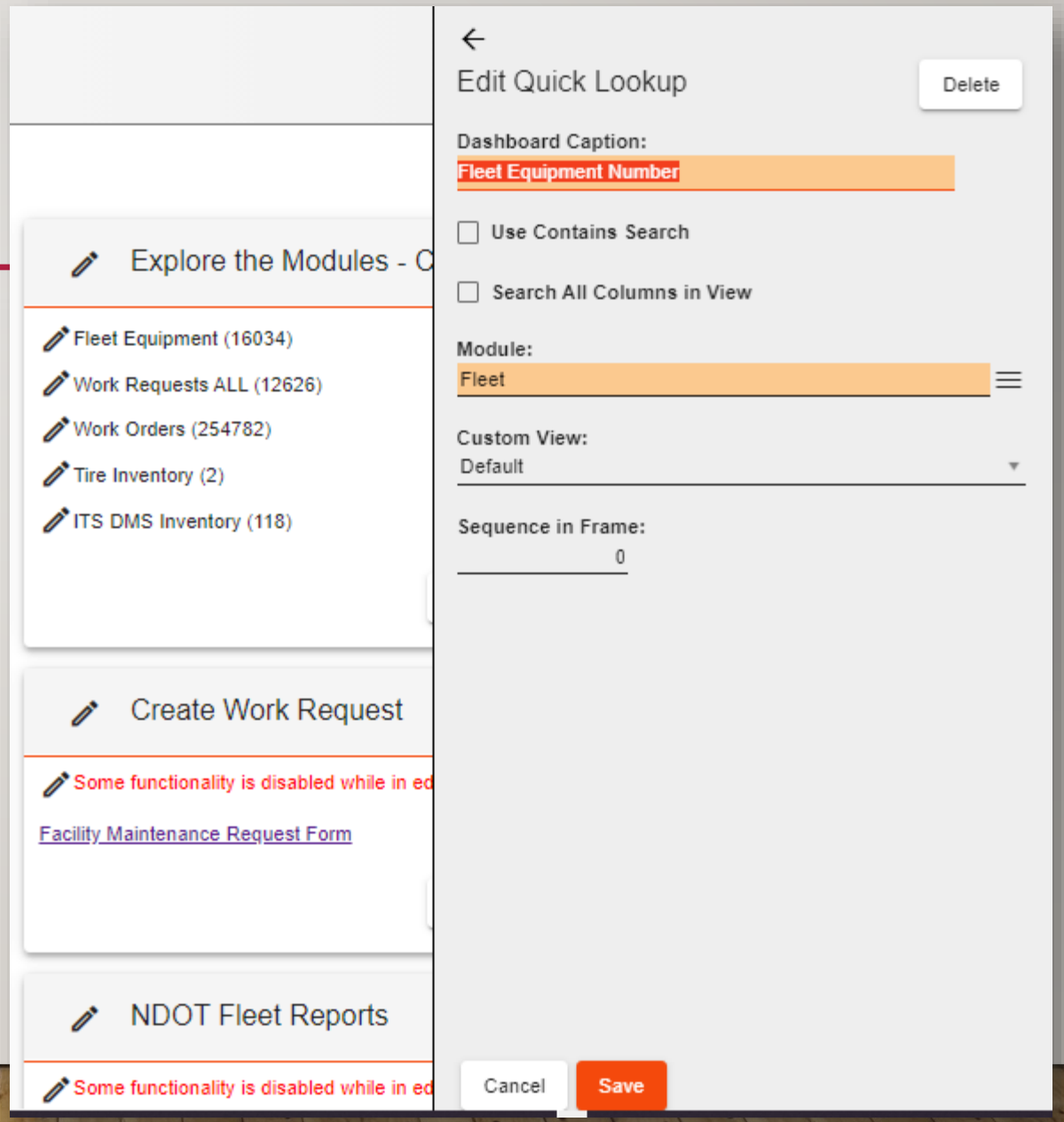


HOW DO I SET UP MY DASHBOARD?

5.) Symbols when you Enter Design Mode

This is the edit symbol.

When this is selected, Lucity will open up the editing dialog box (e.g. Edit Data Drill for this example) for the related component. Make your edits as needed.



HOW DO I SET UP MY DASHBOARD?

6.) Click on the Exit Design Mode button.

All modifications made while in Edit mode get applied immediately. Exit Design Mode is not a "Save Changes function".

7.) The NDOT Welcome to Lucity tab will give you all of the basic, common data and links for your NDOT work; including, Lucity Training Videos, NDOT Links, Create Work Request, Work Requests, Explore the Modules, NDOT Fleet Reports, Equipment Lookup, and Work Order Lookup to easily find an Equipment record or Work Order record.

8.) If you need to add any additional data, asset hierarchy trees, links or modules added to your dashboard or if you need assistance with creating/customizing your dashboard please contact Sandy Forsgren at (402) 479-4504 sandy.forsgren@nebraska.gov or Jacey Schmidt at (402)479-3756 or jacey.schmidt@nebraska.gov

THANK YOU!

QUESTIONS

- Jacey Schmidt, IT Business Systems Analyst Supervisor (402)479-3756 jacey.schmidt@nebraska.gov
- Sandy Forsgren, IT Business Systems Analyst (402)479-4504 sandy.forsgren@nebraska.gov
- Timothy Foss, Engineer IV (402)479-3597 timothy.foss@nebraska.gov

THANK YOU!!