

Markings TOAMS: Region Training and User's Manual

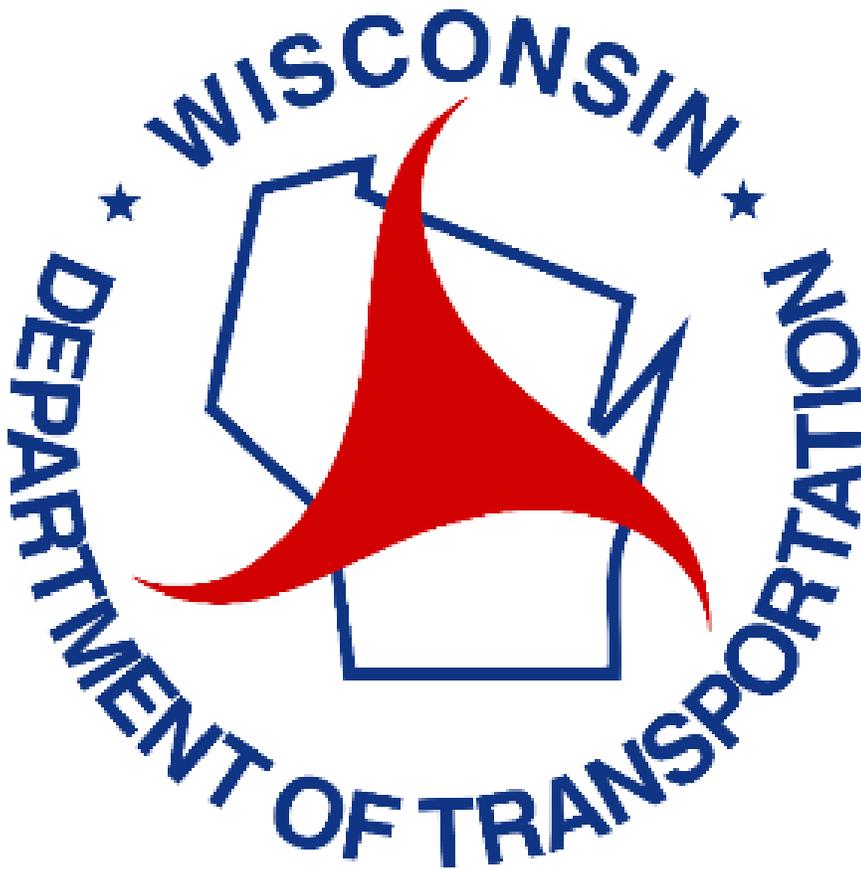


Table of Contents

TOAMS Markings: Logging In, Setting Preferences, Getting Help	3
Logging in TOAMS	3
Getting Help	4
Setting Preferences	4
Searching, Filtering, and Viewing Assets	5
Map Feature	5
Selecting Assets from the Map	6
Data Viewer- Search Pages	7
Data Viewer- Search Filters	8
Filtering Further	10
Saving and Running a Search Filter	11
Reporting	12
Viewing Attribute Data for an Asset	14
Viewing Current Attribute Data	14
Determining Highway Segments to Restripe	15
Using VUEWorks to Filter Assets	15
Attaching Documents	17
Updating, Moving, and Adjusting Assets	18
Adding a New Asset	18
Moving and Adjusting Assets	19
Creating Reports	20
Generate a Standard Report (Traditional)	20
Generate a Standard Report (Dynamic)	24
Training Notes	30



TOAMS Markings: Logging In, Setting Preferences, Getting Help

Logging in TOAMS

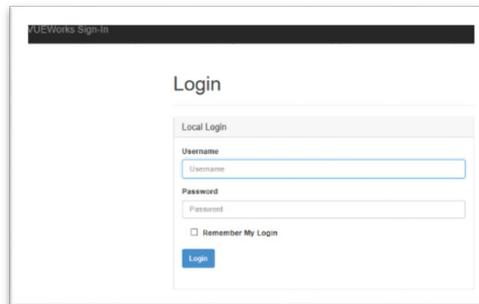
1. Open an internet browser and enter in the following URL

Test/Training: <https://toams-t.wi.gov/VUEWorkstest>

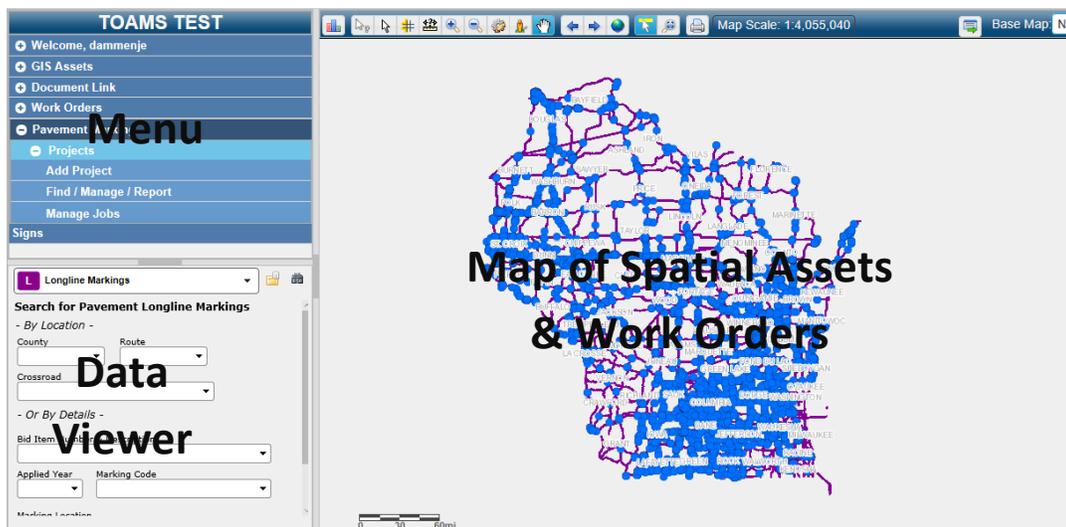
Production: <https://toams.wi.gov/VUEWorks>



2. Log into TOAMS Test system with your WAMS Test ID and password. Should you have difficulty logging in, please contact Mary Elizabeth Kunkel.



3. Navigate the system. The **Menu** accesses work orders and contains marking assets. The **Map** accesses the spatial assets and displays special markings, longline markings and work orders spatially. The **Data Viewer** searches spatial assets as well as displays asset information.



Getting Help

Contact Mary Elizabeth with log in issues.

Contact BTO (Jeannie Silver, Matt Rauch, or Jay Hille) with any other issues.

Setting Preferences

Everyone can set some preferences for the VUEWorks system. These preferences include default settings for work orders, search pages and many other considerations.

1. Navigate using the menu. Click on the **Welcome** option on the menu to expand the menu. Then select the **Set Preferences** option.



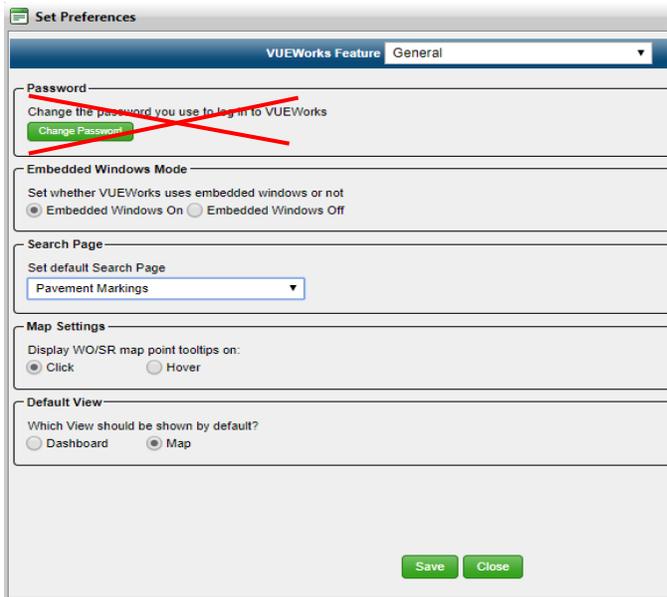
2. The Set Preference window will open and the default VUEWorks Feature is **General**. On the General feature window, you will see many options.

Do not use the Password reset option since you are using another system to manage the password.

3. The Embedded Window Mode is used to allow the sub-windows in VUEWorks to move outside of the application. This is best used when working with two monitors since you can place sub windows on to the different monitors for better management of the system.

Note: Currently the Embedded Windows On works better.

4. In the Search Page area, pull down on the list of search pages and select **Pavement Markings**.
5. The other options for Map Settings and Default View are up to your preference. If you select Dashboard for Default View, the Dashboard will display when



you log in. To go to the main program with the Map, click on the  VUEWorks toggle button in the upper left area. **Do not click on the browser back button.** It will log you out of VUEWorks.

6. Click on the **Save** button when you have made all the changes that you want.

Searching, Filtering, and Viewing Assets

VUEWorks offers many ways to select assets. The most common ways are using:

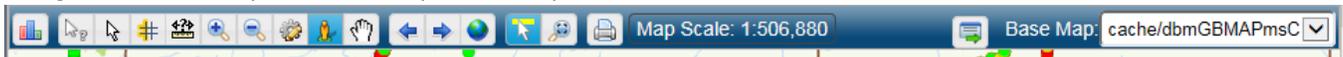
- The Map Feature
- Data Viewer Search Pages
- Data Viewer Search Filters

We will walk you through these methods. Once assets have been selected, many other actions can be performed. Those options will be described later in this document.

Map Feature

Get to know the Toolbar

The toolbar along the top of the map lets you perform a variety of tasks associated with selection of assets and navigation of the map. Below is a quick description of each of these tools and their function.



a	b	c	d	e	f	g	h	i	j	k	l	m	n	o		P	q	
---	---	---	---	---	---	---	---	---	---	---	---	---	---	---	--	---	---	--

- a. **Show Dashboard:** Dash board view
- b. **Map tip:** Display asset information by clicking the asset on the map.
- c. **Select assets:** Select one or more assets by clicking the location on the map or drawing a box on the map. The assets are then added, replaced, or removed in the Data Viewer selection set.
- d. **Select assets using buffer:** Select all assets within a specific distance of an asset you select on the map.
- e. **Measure:** Find linear and area measurements.
- f. **Zoom in/out:** Zoom in or out of the map area.
- g. **Edit map:** Add or edit features on the map, along with their attributes.
- h. **Street view:** Select a point on the map to display it in google street view.
- i. **Pan map:** Move up, down, left, or right on the map.
- j. **Zoom previous/Next:** Move to the previous zoom level. This is useful when you have been zooming in and out a lot or have accidentally zoomed to a place you did not mean to go.
- k. **Zoom to map extents:** Zoom out of the map to its fullest extent.
- l. **Highlight selected assets:** Display yellow highlights on all selected assets in the Data Viewer selection set.
- m. **Zoom to selected asset:** Zoom to the location of the currently selected asset in the Data Viewer.
- n. **Print map:** Print the currently displayed map – just the area that is visible on the screen.
- o. **Map scale:** Displays the map. Note: Assets/Layers and work orders will only display on the map at a set scale.
- p. **Toggle Layer Legend:** Display or hide the list of map layers and the legend. Note the more operational basemaps you select, the slower the load time will be to select assets.



- q. **Toggle Basemap selection:** Display or hide the list of base maps to choose from. Select whatever background you would like.

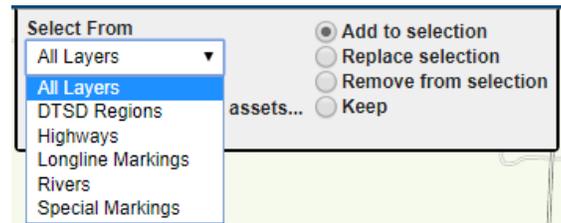


Selecting Assets from the Map

One way to select assets is by using the map area and the tools above for selecting the assets. Use the navigation tools or scroller with your mouse to zoom close to the asset(s) you wish to select and click on the **Select Assets**  tool button. If no assets are shown on the map go to the Toggle Layer Legend and make sure Special Markings and/or Longline Markings are checked. When you are viewing assets, you can look at one at a time or both.

Note: If the map is not where you would like it to be select the  and drag the map where you would like it to be.

The Selection dialogue box will display. The default is All Layers. Change the **Select From** option using the drop-down arrow. Select **Longline Markings** or **Special Markings**. The default option is **Add to selection** and will continue to add assets selected to the list. The other options are available by clicking on the radio button next to them. **Replace Selection** will clear a current selection with the assets selected. **Remove Selection** will remove only those assets selected from the current selection.

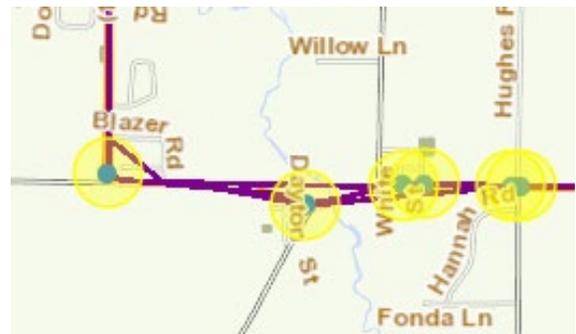


Note: To add both Special Markings and Longline Markings you will have to complete this step twice.

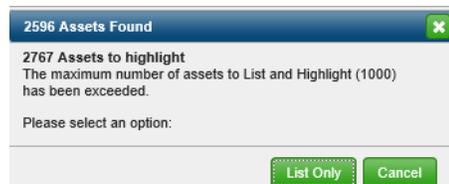
Using the mouse pointer, draw a box around the assets to be selected. The selected assets will be highlighted in yellow and the assets will be displayed in the Data Viewer.

6 Assets Selected

	Asset ID	Layer	Location
1	9674	Special Markings	
2	9677	Special Markings	
3	9679	Special Markings	
4	9681	Special Markings	
5	9682	Special Markings	



Warning: There will be times in which your search will produce a large selection of assets, the system will prompt you to list only the assets and not highlight them on the map. Click on the **List Only** button and the assets will appear in the Data Viewer.

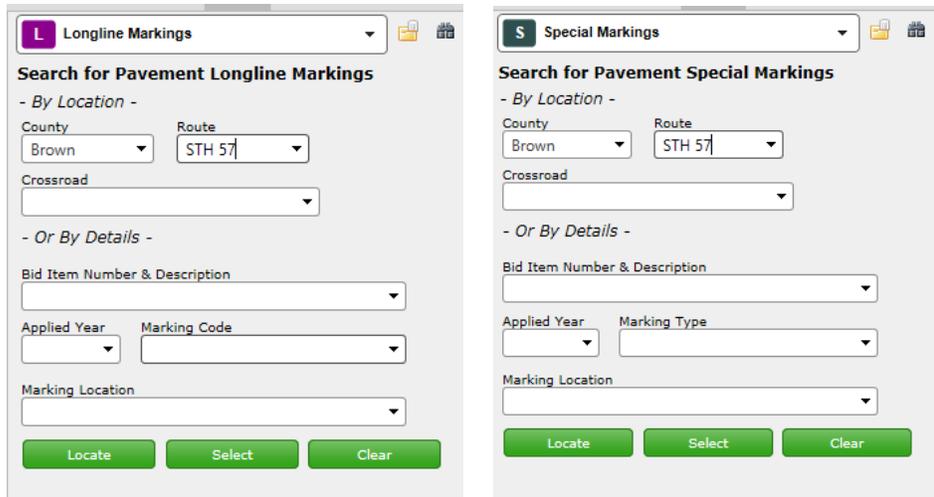


*Note: To remove the asset selection from the Data Viewer to do another search, click on the **Red X**  icon in the upper right corner of the Data Viewer area.*

Data Viewer- Search Pages

The data viewer will display a default search page. In the set preferences, you can change the search to default to Longline or Special Markings. Below are the steps to using a search page in the Data Viewer.

1. There are several fields that are searchable for this search page. Enter in a value for the fields. You can enter a value for only one or enter values for several. The asset must have all those values to be returned in the search.



2. Once the field or fields have been entered, use the **Locate** button to highlight the assets on the map or the **Select** button to highlight them on the map and add them in the Data Viewer as a list of assets.

Note: This only works for one search page. Using both search pages will not add both to the Data Viewer. A Data Search Filter will need to be utilized to add both longline and special markings to the Data Viewer.

18 Assets Selected

	Asset ID	Layer	
1	7275	Special Markings	STH 57, M
2	7276	Special Markings	STH 57, M
3	7278	Special Markings	STH 57, M
4	7279	Special Markings	STH 57, S
5	7281	Special Markings	STH 57, M
6	7282	Special Markings	STH 57, M
7	7284	Special Markings	STH 57, M
8	7286	Special Markings	STH 57, M
9	7287	Special Markings	STH 57, M
10	7290	Special Markings	STH 57, M
11	7292	Special Markings	STH 57, M
12	7295	Special Markings	STH 57, S



Data Viewer- Search Filters

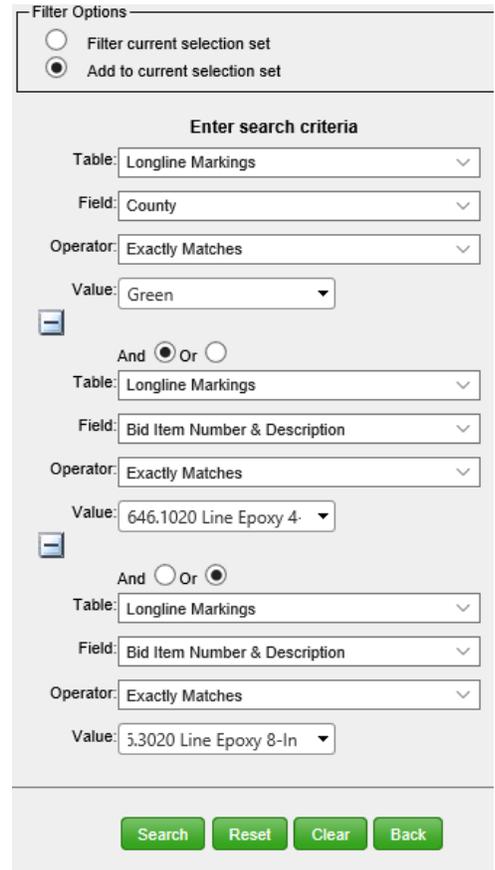
In addition to the search pages, the Data Viewer has the option to manually do a filtered search. To access the search filter, click on the **Binoculars**  icon. The search feature will display in the data viewer. To the right is an example for searching for Epoxy 4 and 8 inch lines in Green County.

1. Make sure the Data Viewer is empty by click the red x.
2. Set the Filter Options to **Add to current selection set**.
3. In the search criteria area, in the Table drop-down list select **Longline Marking**.

Note: It may take a few seconds for the Drop Downs to generate.

4. In the Field drop-down list, select **County**.
5. In the Operator drop-down list, select **Exactly Matches**.
6. In the Value field drop-down list, select **Green** or any County.
7. The **Plus**  icon adds additional search criteria.
8. In the Table drop-down list select **Longline Marking**.
9. In the Field drop-down list, select **Bid Item Number & Description**.
10. In the Operator drop-down list, select **Exactly Matches**.
11. In the Value field drop-down list, select **646.1020 Line Epoxy 4-In**.
12. The **Plus** icon and change the radio button to **Or**.
13. In the Table drop-down list select **Longline Marking**.
14. In the Field drop-down list, select **Bid Item Number & Description**.
15. In the Operator drop-down list, select **Exactly Matches**.
16. In the Value field drop-down list, select **646.3020 Line Epoxy 8-In**.
17. Click on the **Search** button.

*Note: If no assets are found make sure the **OR** is selected between the 4" Epoxy and 8" Epoxy.*



All assets meeting the criteria will be displayed in the data viewer. The assets may also be highlighted in the map area.

417 Assets Selected

	Asset ID	Layer	Location
1	 18799	Longline Markings	
2	 18800	Longline Markings	
3	 18801	Longline Markings	
4	 18802	Longline Markings	
5	 18803	Longline Markings	
6	 18810	Longline Markings	
7	 18817	Longline Markings	
8	 18827	Longline Markings	



If you would like to add Special Markings to this search, follow the steps below.

18. Select the Binocular button at the top of the Data Viewer.
19. Change the radio button to **Add to Current Selection**.

-Filter Options-

Filter current selection set

Add to current selection set

20. Change the Table name from Longline Markings to **Special Markings**. Fill everything else in based on which bid items you want to add.

Enter search criteria

Table:

Field:

Operator:

Value:

And Or

Table:

Field:

Operator:

Value:

And Or

Table:

Field:

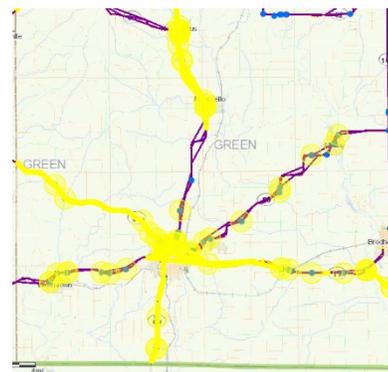
Operator:

Value:

21. Select **Search**.

489 Assets Selected

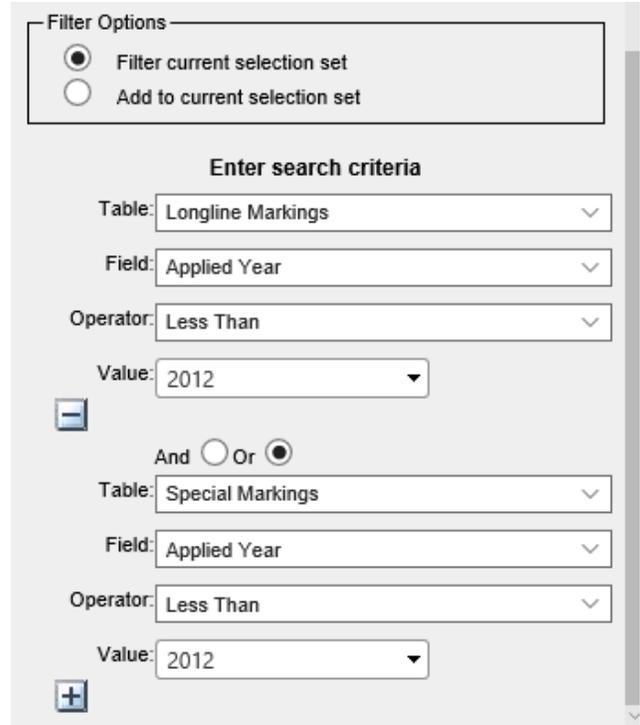
	Asset ID	Layer	
4	1206	Special Markings	STH 11, East
5	1184	Special Markings	STH 11, East
6	1190	Special Markings	STH 11, East
7	18960	Longline Markings	STH 11, East
8	18961	Longline Markings	STH 11, East
9	19397	Longline Markings	STH 11, East



Filtering Further

VUEWorks allows sub searches. This can be done by clicking on the Binoculars icon from the selection list. Then select the Filter Options as **Filter current selection set** to narrow down the selection set. Below will show you how to filter the selection for markings older than 2012.

1. When you have the previous selection set in the Data Viewer, click on the **Binocular**  icon.
2. Set the Filter Options to **Filter current selection set** by clicking on the radio button next to it.
3. In the Table drop-down list, select **Longline Markings**.
4. In the Field drop-down list, select **Application Year**.
5. In the Operator drop-down list, select **Less Than**.
6. In the Value field drop-down list, select **2012**.
7. Make sure **Or** is selected.
8. In the Table drop-down list, select **Special Markings**.
9. In the Field drop-down list, select **Application Year**.
10. In the Operator drop-down list, select **Less Than**.
11. In the Value field drop-down list, select **2012**.
12. Click on the **Search** button.



Filter Options

Filter current selection set
 Add to current selection set

Enter search criteria

Table: Longline Markings
Field: Applied Year
Operator: Less Than
Value: 2012

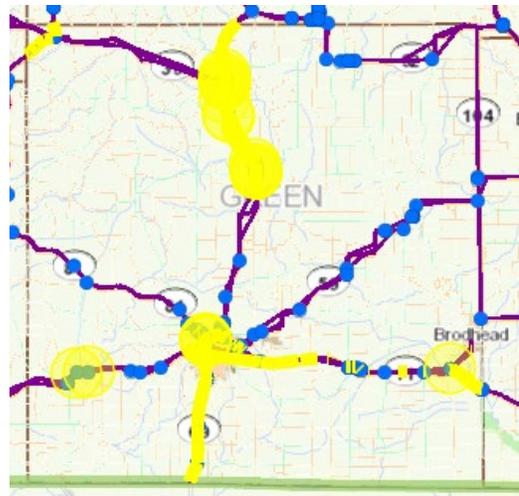
And Or

Table: Special Markings
Field: Applied Year
Operator: Less Than
Value: 2012

Notice that the number of assets selected has decreased.

306 Assets Selected

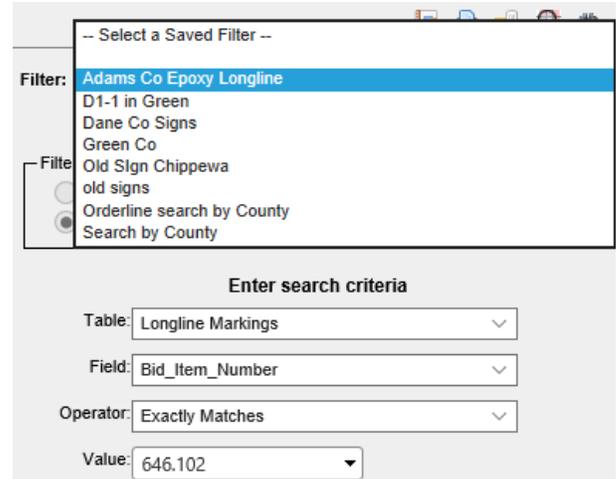
	Asset ID	Layer	
282	95920	Longline Markings	STH 81, East
283	95922	Longline Markings	STH 81, East
284	1142	Special Markings	STH 11, West
285	1194	Special Markings	STH 11, East
286	1194	Special Markings	STH 11, West
287	8485	Special Markings	STH 69, South
288	8486	Special Markings	STH 69, South



Saving and Running a Search Filter

VUEWorks allows the run and save commonly used filter conditions.

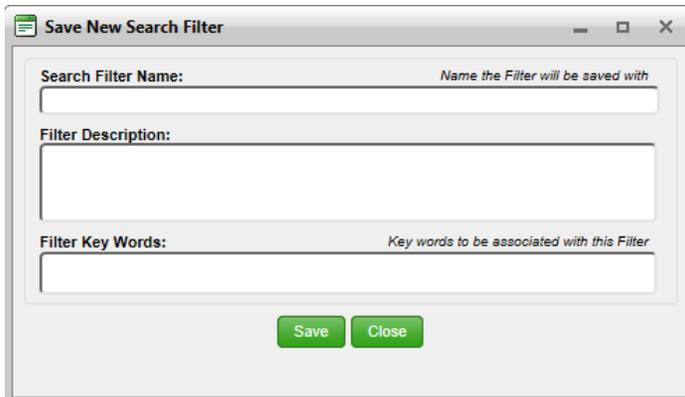
1. Clear the Data Viewer by clicking the **Red x**.
2. To run an existing search filter, click on the **Binoculars**.
3. Click on the **Filter** drop-down and select the search that you would like to run. The Search criteria fields will populate with the saved filter criteria.
4. Click on the **Search** button to run the filter.



5. To save a search filter, enter in your search criteria.
6. Then click on the **New** button under the Filter list.



7. The **Save New Search Filter** widow will open.



8. Enter a **Search Filter Name**.
9. The **Filter Description** and **Filter Key Words** can also be filled in before saving. Then click on the **Save** button.

Note: Filters can be changed. Select the filter from the list, modify the filter then enter or click on the Save button to update/change the filter.

Note: Saved Searches are not available to you until you close out of the Data Viewer and go back in.

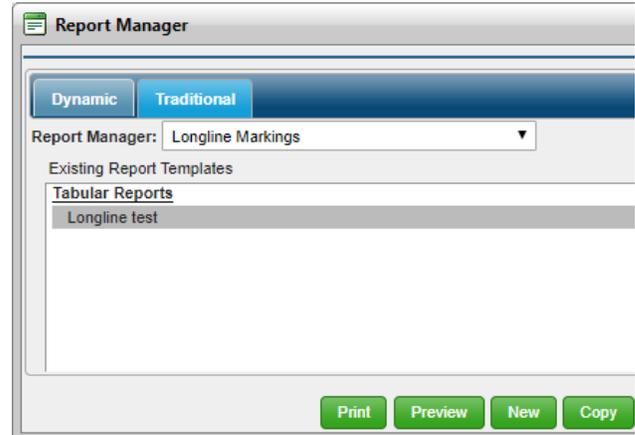
Reporting

Once assets have been selected, several actions can be done with them. Reporting on these assets is an important part of managing assets. Below is an example of running the Longline Test Report.

1. Make sure that you have a selection of assets in the Data Viewer before running reports.
2. From the Data Viewer, there is a series of icons across

the top. The **Report**  icon will open the Report Manager window and allow you to select a report and print using the selected assets.

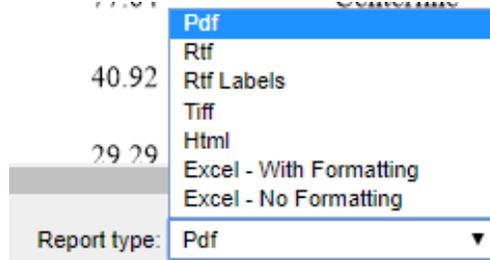
3. There are both Dynamic and Traditional reports to choose from. Traditional reports are canned reports and Dynamic reports are reports someone in the Region/BTO created. For the Field Inventory Report, click on the **Traditional** tab and the list of reports are displayed.



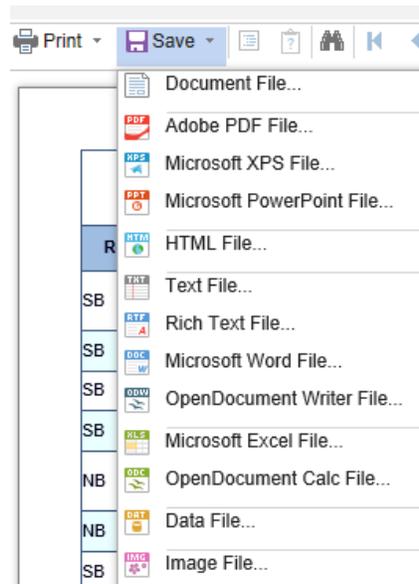
4. Click on the **Longline test** to highlight it.
5. Then click on the Preview button. The report will open in a separate browser window.

Longline test						
Route	End Marker	Start Marker	Marking Location	JobType	Bid item Number	AppliedYear
_048E	40.75	40.73	Centerline	[JobType.0.46]	Marking Line Paint 2017 4-Inch	
_008E	29.9	29.79	Centerline	[JobType.0.46]	Marking Line Paint 2017 4-Inch	
_008E	35.52	35.51	Centerline	[JobType.0.46]	Marking Line Epoxy 4-Inch	2016
_025N	72.65	72.16	Edgeline Right	[JobType.0.46]	Marking Line Paint 2017 4-Inch	
_063S	102.04	99.78	Edgeline Right	[JobType.0.46]	Marking Line Grooved Wet Ref Epoxy 4-Inch	2012
_008W	75.86	75.74	Edgeline Left	[JobType.0.46]	Marking Line Paint 2017 4-Inch	
_025N	77.83	77.64	Centerline	[JobType.0.46]	Marking Line Paint 2017 4-Inch	
_048E	41.08	40.92	Centerline	[JobType.0.46]	Marking Line Paint 2017 4-Inch	

6. There are printing and saving options for reports. When running a Traditional Report, the options for printing and saving are different and is located at the bottom. Click on the **Report type** drop-down list. See the example here. Select what format you want the sign in.



7. If you were running a Dynamic report, the save option is in the upper left area of the report. Click on the **Save** drop-down list. Select which option you want. When done, close the browser window for the report and return to VUEWorks. More information on creating and editing reports will be later in the document.

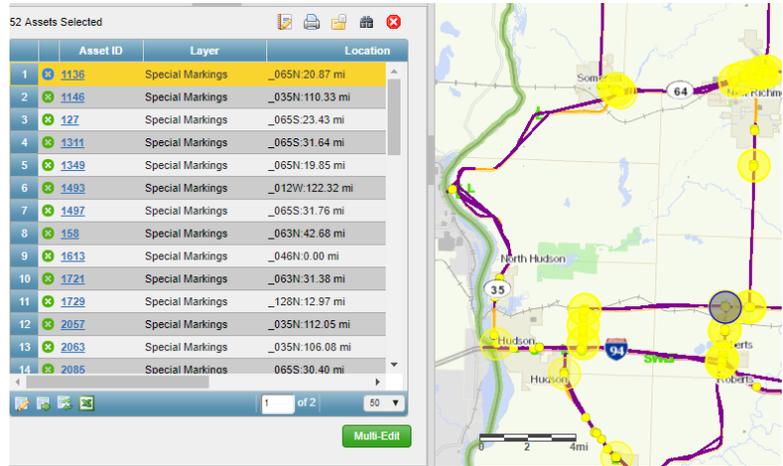


Viewing Attribute Data for an Asset

Viewing Current Attribute Data

VUEWorks provides an area for managing all aspects of an asset. The Data Viewer will allow you to view the selected assets, but it will also provide a location to view attributes (data fields) about each of the assets, work orders, documents and much more.

1. Use one of the search features previously talked about to select assets. The Data Viewer will display the selected assets and they will appear highlighted on the map.
2. In the Data Viewer, there is a column with Asset ID and a column for Layer. If you click on the Layer for an asset in the list, the asset will get highlighted in blue on the map. Clicking on another one will highlight that one in blue. Clicking on the **Asset ID** link (in blue and underlined) will select and display the Attributes for that asset.
3. Clicking on the **Show All** button in the lower right corner of the Data Viewer will take you back to the list. The **Green Arrows** will let you move between the assets.



Special Markings: 1142

A Attributes

Save Cancel

Marking ID*	1142
Region	Southwest
County	Green
Route	STH 11
Travel Direction	West
Nearest Crossroad	
Starting Marker	50.102
Starting Lat	42.5890356
Starting Long	-89.7864923
Bid Item Number &	646 6120 Stop Line Entry 48 In

284 of 306 Show All

4. Assets can be sorted by clicking in the header, a white arrow will light up displaying how they were sorted.

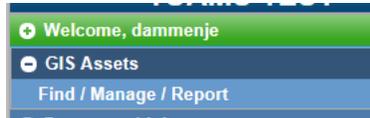
	Asset ID	Layer	Location
1	1136	Special Markings	_065N:20.87 mi
2	1146	Special Markings	_035N:110.33 mi
3	127	Special Markings	_065S:23.43 mi
4	1311	Special Markings	_065S:31.64 mi

5. The drop-down list can be used to display other information about the selected asset.

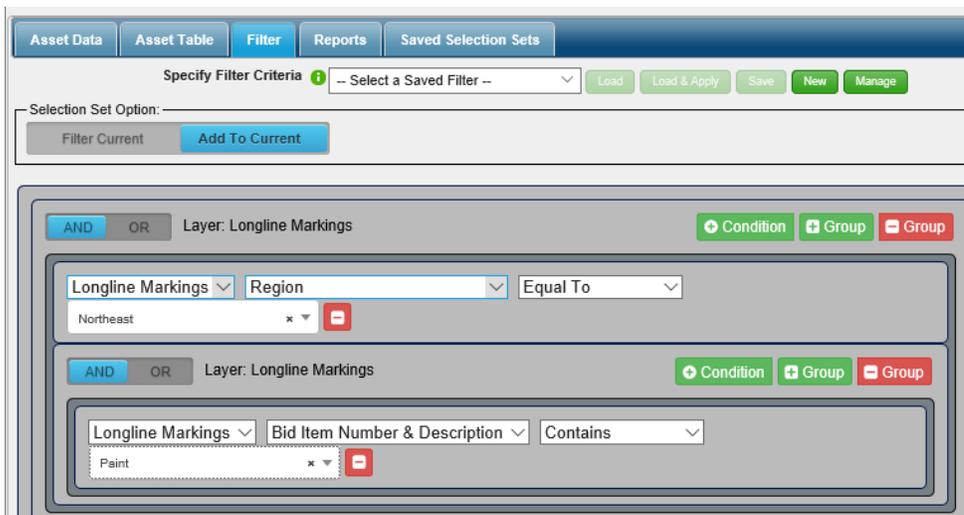
Determining Highway Segments to Restripe

Using VUEWorks to Filter Assets

1. Another less common way to Filter for Assets is using the GIS Assets Tab. This Tab allows you to use the contains instead of doing each bid item separate. Make sure the Data Viewer is cleared of any selected assets.
2. Click **GIS Assets** on the Menu Bar. Then click **Find/Manage/Report**.



3. A separate dialog box will pop up. Under the **Filter Tab** enter the following filter. To add another line, click the **+ Group** button. This report will give you any longline bid items with the word paint in it.



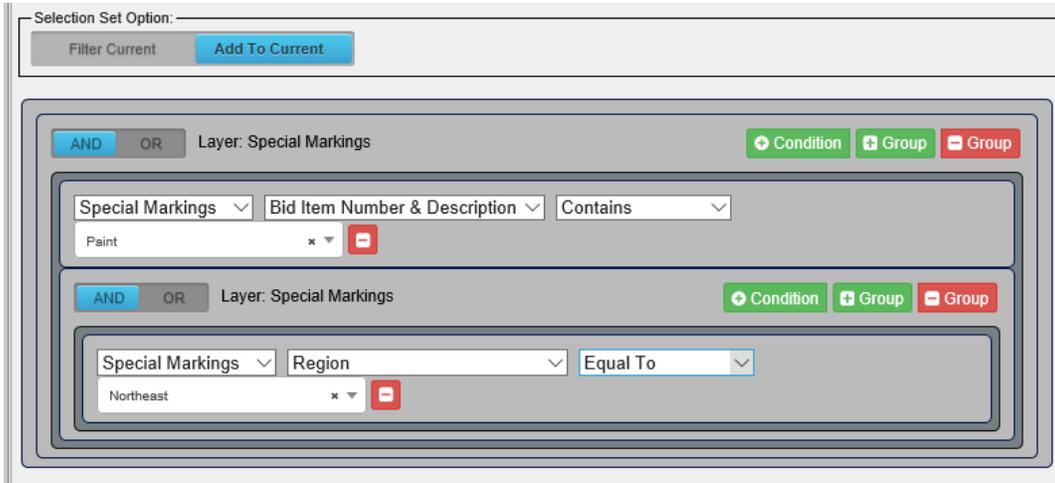
4. Click on the **Apply Filter** button at the bottom of the popup window. The assets should add to the DataViewer.
Note: This could be a large search. Do not click around while the program is processing. If the search is over 1000 another popup window will appear. Select **list only** for markings to add to the Data Viewer.

5. Click on the report button .
6. The report manager window will pop up. Select the **Traditional Tab**.
7. In the Report Manager select **Longline Markings**. Run which report you would like.



8. Select **Preview**.
9. Export the report to Excel. You most likely will want to select Excel with Formatting.

10. If Special Marking are also need. Click **GIS Assets** on the Menu Bar. Then click **Find/Manage/Report**.
11. A separate dialog box will pop up. Under the **Filter Tab** enter the following filter. This report will give you any special marking bid items with the word paint in the title.



12. Click on the **Apply Filter** button at the bottom of the popup window. The assets should add to the Data Viewer.

13. Click on the report button .

14. The report manager window will pop up. Select the **Traditional Tab**.
15. In the Report Manager select **Special Markings**. Run which report you would like.

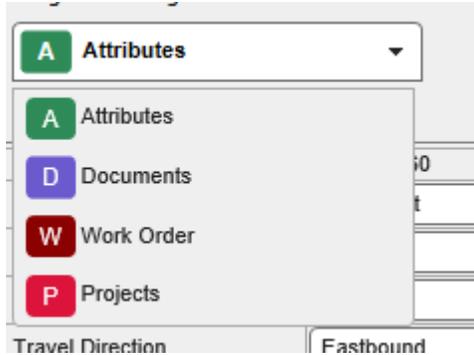


16. Select Preview.
17. Export the report to Excel.
18. Using excel determine what segments should be replaced. Pick logical start and end points.
19. We will then create a work order in VueWorks to track the history of these assets.

Attaching Documents

Navigate to the Marking you would like to add a document to.

1. Select Documents from the Dropdown lists.



2. Click on the **Add Document**  button.

3. Click on the **Upload Link** tab at the top of the Create Document Link window.

4. Click on the **Browse** link.

5. Navigate to the file location you would like to attach.

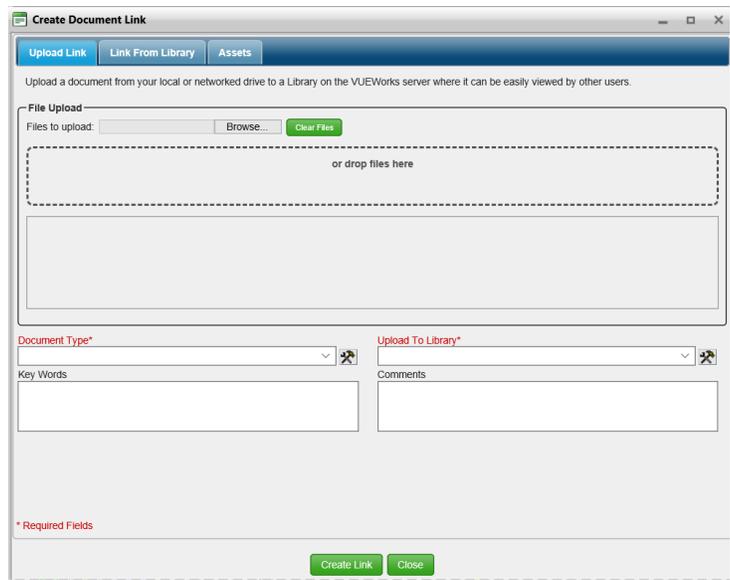
6. In the **Document Type** drop-down list, select Document.

7. In the **Upload To Library*** drop-down list, select the correct BTO SIGNS.

8. Click on the **Create Link** button and then click on the **Close** button.

9. The document is listed in the Document area for the work order.

10. Click on the **Create Link** button to save the work order and generate a work order number.

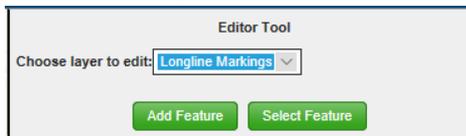


Updating, Moving, and Adjusting Assets

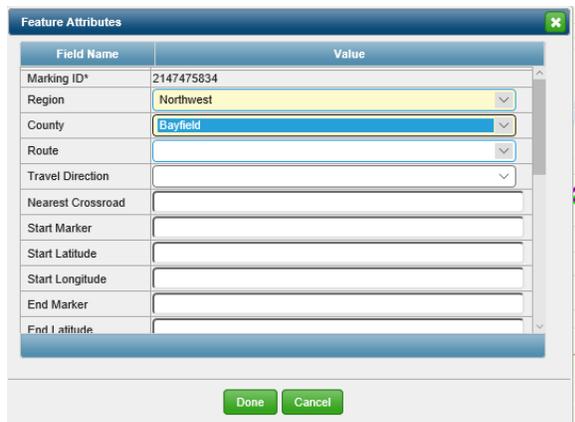
Adding a New Asset

Below are the instructions to add an asset.

1. Click on the **Edit Map**  icon at the top of the Map Toolbar.
2. The Editor Tool will display at the top of the map area. On the Choose layer to edit drop-down, select **Pavement Marking**.



3. Then click on the **Add Feature** button and draw where you would like the marking asset. Double click when you are done drawing out the marking.
4. The Feature Attributes dialog box will open. Only enter in the region and county. Do not enter in all the information here. It does not always save your record.



Field Name	Value
Marking ID*	2147475834
Region	Northwest
County	Bayfield
Route	
Travel Direction	
Nearest Crossroad	
Start Marker	
Start Latitude	
Start Longitude	
End Marker	
End Latitude	

5. Select the **Done** button.
6. Enter in the rest of the information in the Data Viewer.
7. Then select the Save  button.

*Note: **DO NOT** touch the latitude/longitude fields.*

Moving and Adjusting Assets

Assets may also need to be moved or adjusted.

1. Navigate to the asset you wish to change. Select the **Gear tool**  from the top of the map.

Note: Assets are not displayed following the exact alinement of the road. This is an enhancement that is being worked on. The start and end locations are how the data was imported from Cartegraph. However, some lat and long values were incorrect.

2. Click on Select Feature and move the nodes to the correct location so it follows the roadway.

Note each node of a long line pavement marking needs to be moved individually.

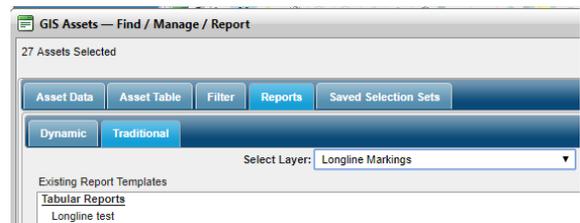
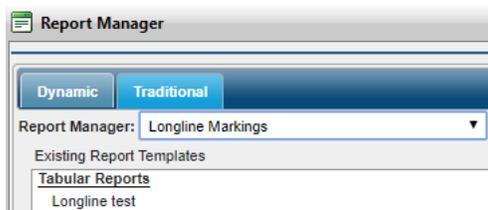


Creating Reports

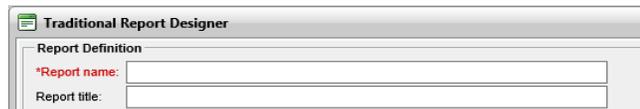
Generate a Standard Report (Traditional)

Standard reports consist of basic information in a very basic layout. You can then use the standard report templates to generate reports of your own, as well as make simple changes to their content

1. From the Menu pane, select the **Find/Manage/Report** from either the Work Orders or GIS Assets drop down depending on what you would like to run a report on. If you have assets you wish to run a report on are in the Data Viewer you can select the .
2. When the screen appears, go to the **Report** tab and select **Traditional** or Select **Traditional** if you selected the Report Icon.

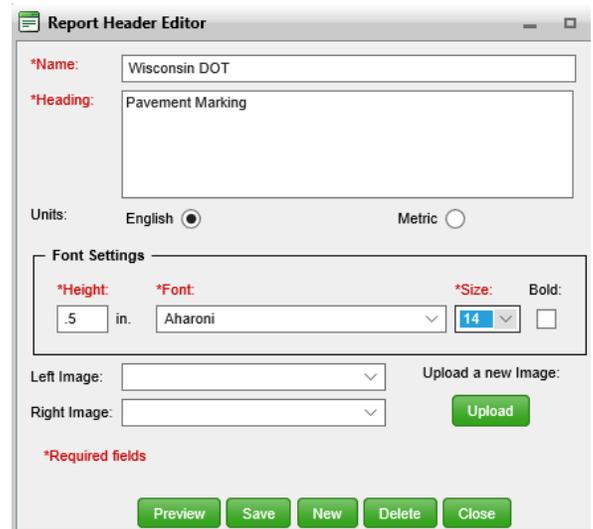


3. From the drop-down select **Longline Markings** or **Special Markings**.
Note: You will have to run 2 reports for all assets.
4. Traditional reports are generally tabular in structure and are great for lists, barcode printing, and data summaries. Click on the **New** button to create a traditional report.
5. Enter in a Report Name. For Training purposes, put your FirstName-ReportName for the report name. The report title appears at the top of the report as a header. The report header allows the creation and use of standard letterhead with special fonts and pictures or agency logos.



6. **Report Header:** This is a “running header” that appears above the title, such as your company name and location. It can be repeated on every page. To define a header, click the **Manage Headers** icon . The Report Header Editor dialog appears.

- Provide a name for the heading.
- Specify the height of the header area (you also specify the units of measurement for the height).
Note: The height needs to be great enough to accommodate the header text and images, if any.
- Specify the font type, size, and style.
- Images can also be used use in the header.
- Click **Save** when you are done to close the dialog.



7. **Style** (required): Indicates the type of report you want to generate:



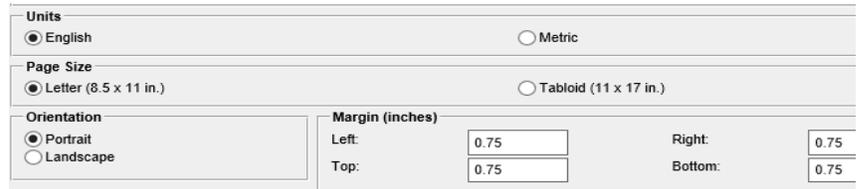
- **Form:** Report looks like a form.
- **Tabular:** Report is a table of data with one field per column and one record per row.
- **Advanced Tabular.** Report is a table of data with multiple fields per column and multiple records per row.
- **Form Merge.** Report is generated by merging in data from VUEWorks selection sets.

8. Leave Units as **English**.

9. Select Paper Size as **either 8.5x11 or 11x17**.

10. Leave Margins as **0.75**.

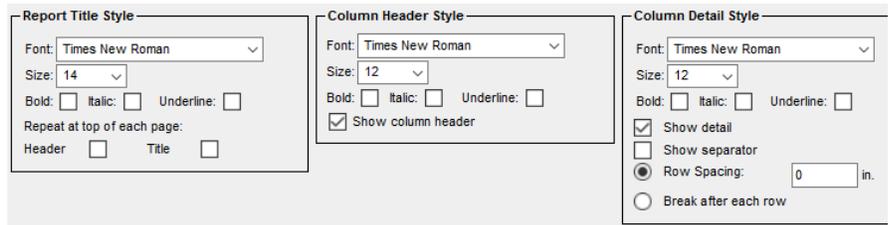
11. Change the **Orientation** from Portrait to **Landscape** to provide more space for columns.



12. **Report Title Style:** This is the font used for the title.

13. **Column Header Style:** This is the font used in the Header

14. **Column Detail Style:** This is the font used in rows and columns of the report



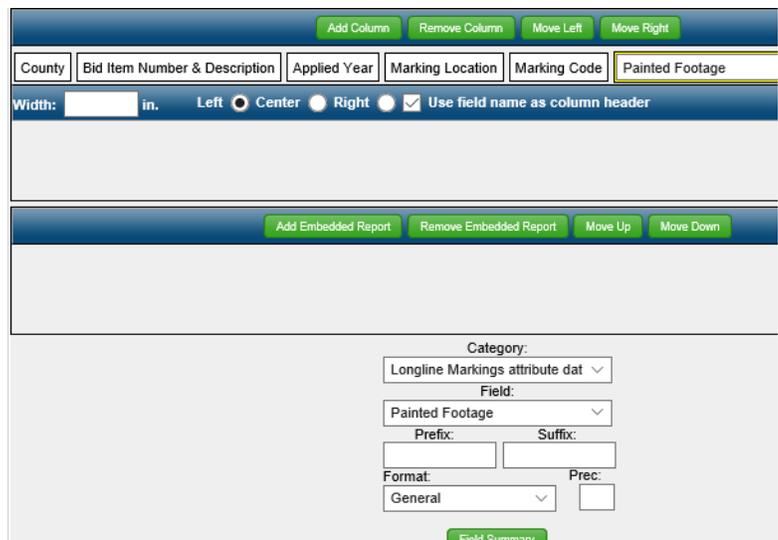
15. Press **Next** to view the next page where you specify what should be included in the report.

16. The Traditional Report Designer displays. To add a column, click on the **Add Column** button at the top.

17. In the mid-section, the selection list displays. Select the **Category** and **Field** for the column. Formatting options are available. This is where you could format a number as a barcode.

18. Continue to add columns and fields to the report.

19. Some field types allow for summary options.




20. Click Field Summary.
21. Fill in the boxes as appropriate.
22. When you have selected all the fields, click on the **Save** button. You can save anytime you make a change and would like to preview it.

The 'Field Summary Options' dialog box contains the following elements:

- Five rows of summary options: Total, Average, High, Low, and Count. Each row has a checkbox, a 'Prefix:' text box, and a 'Suffix:' text box.
- A 'Where 'Field'' dropdown menu followed by a '-- Select Operator --' dropdown menu and an empty text box.
- Two green buttons at the bottom: 'Ok' and 'Cancel'.

23. The displayed columns can be formatted in terms of size/length, column title, and alignment. Select the column and then make the changes. Preview the results at any time. Saving is required before previewing.

The report configuration interface shows a table of columns with the following details:

- Buttons: Add Column, Remove Column, Move Left, Move Right.
- Columns: Logged Date / Time (highlighted), Activity Description, Status, Assigned To.
- Width: 3 in.
- Alignment: Left (selected), Center, Right.
- Use field name as column header:

Click on the **Next** button to continue with report Sorting, Grouping, and Footer creation.

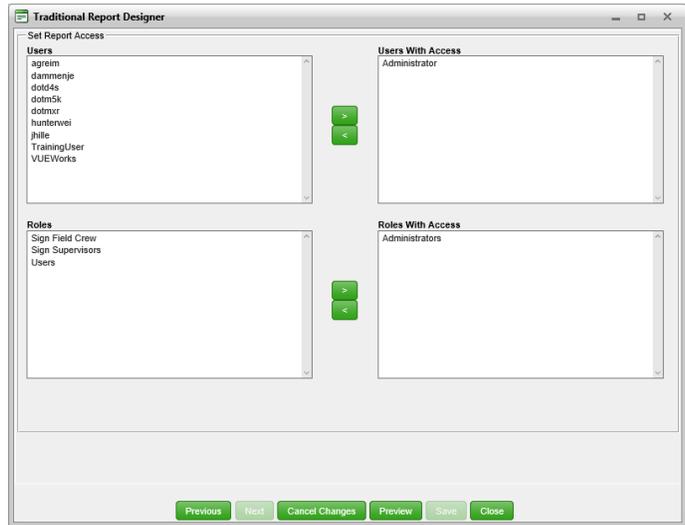
24. Enter in any sorting criteria, indicate ascending or descending, and add any other formatting desired. Click on the **Next** button to display the Access screen.

The 'Traditional Report Designer' dialog box is divided into several sections:

- Level 1, 2, 3:** Each level has 'Sort' (Ascending/Descending), 'Provide' (0.00 in. between groups), 'Page Break after each Group' (checkbox), 'Category' (dropdown), 'Field' (dropdown), 'Label' (text box), and 'Grouping' (Header/Footer checkboxes).
- Footer Section:** Includes 'Show Report Footer (summary)' checkbox, 'Total', 'Average', 'High', 'Low', 'Count' labels, 'Summary Label/Value' radio buttons, and font/size/bold/italic/underline options.
- Buttons:** Previous, Next, Cancel Changes, Preview, Save, Close.



25. The Set Report Access works the same as the Filter Save feature. Select the Users or Roles and click on the right arrow to give access. Select on the right side any User or Roles and click on the left arrow to remove access.
26. Save the report and preview and/or print the report. All reports display in a window prior to being printed and most pop up a separate window. If it does not work, check for pop up blockers, allow pop ups, and then run the report again.



27. If you want to make some changes to the report before you print it, select the report from the **Traditional** tab and **Edit**. The Traditional Report Designer screen appears. Change any fields that need to be changed.
28. To delete an existing report template, select it from the Existing Report Templates pane and click the **Delete** button.
29. A confirmation dialog box will pop up. Click the **Delete Report** button.



30. The report name will no longer appear under the **Existing Report Templates** pane.
31. To copy an existing traditional report template to serve as the basis for a new one, select the report and click **Copy**.
 - a. When the Traditional Report Designer screen appears, change the **Report name** and **Report title** and then follow the same process and make any other desired changes.
 - b. Once you're finished, click **Save** and the name of the new report will appear under the **Existing Report Templates** pane.

Generate a Standard Report (Dynamic)

1. From the Menu pane, select the **Find/Manage/Report** from either the Work Orders or GIS Assets drop down depending on what you would like to run a report on. If you have assets you wish to run a report on are in the Data Viewer you can select the  after a search is completed.
2. When the screen appears, go to the **Report** tab and select **Dynamic** or Select **Dynamic** if you selected the Report Icon.

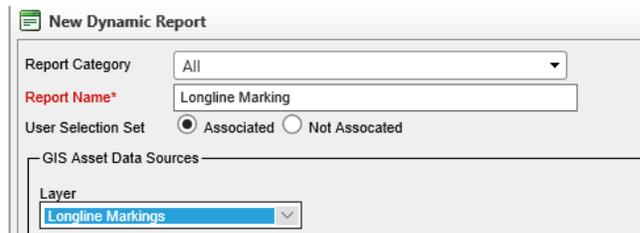


3. Click on the **New** button to create a traditional report.
4. A new Dynamic Report screen pops up. If the Report Window does not pop up and you receive an error that says you need Adobe Flash Player complete the follow steps.
 - a. Click the 3 dots in the upper right-hand corner of your browser window.
 - b. Click on Settings at the bottom of the list.
 - c. Click on Advanced Settings at the bottom of the list.
 - d. Turn on the Adobe Flash Player.

Use Adobe Flash Player



5. A **Report Name** must be entered in order to proceed with the creation of your report. Keep the **User Selection Set** as Associated. In the **GIS Asset Data Source** section, click on all of the Signs. Click the **OK** button.



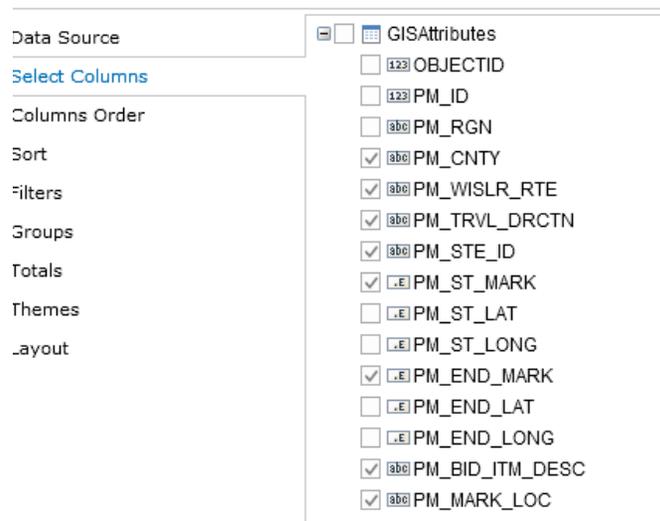
6. The Wizard will display after loading. **Select Using Report Wizard** and **Standard Report** are selected. Click the **Ok** button.



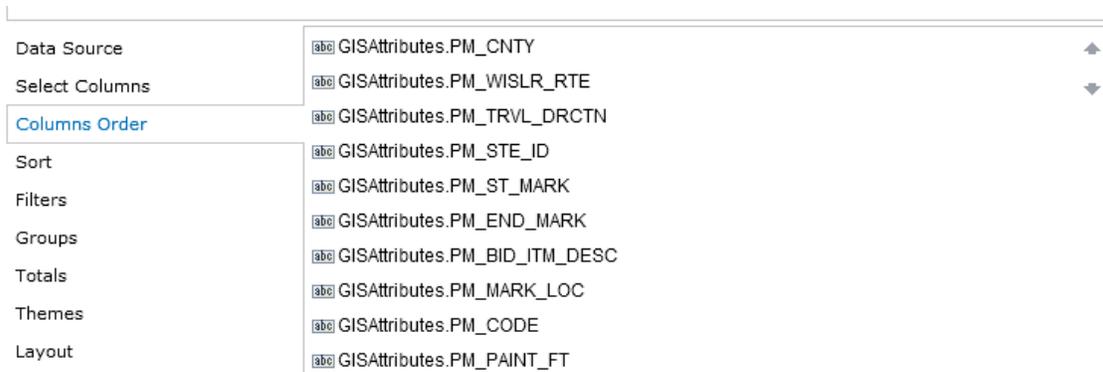
7. The Data Source option will display. **Select GIS Attributes** and click the **Next** button.



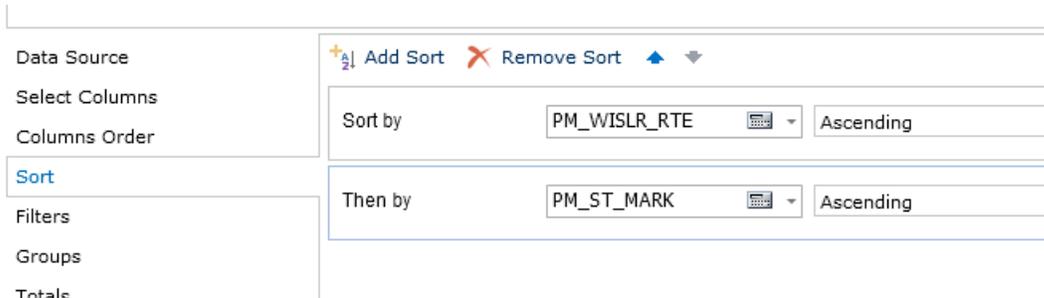
8. The Select Columns options will display. Check each field you would like included in your report. Then click on the **Next** button.



9. The **Column Order** section will display along with all the fields you selected previously. Use the **Up** and **Down** arrows on the right side of the window to arrange the fields in the order that you would like. This step here will save you a lot of time. They can be arranged once the report is rendered but it takes more time and effort. Click on the **Next** button.

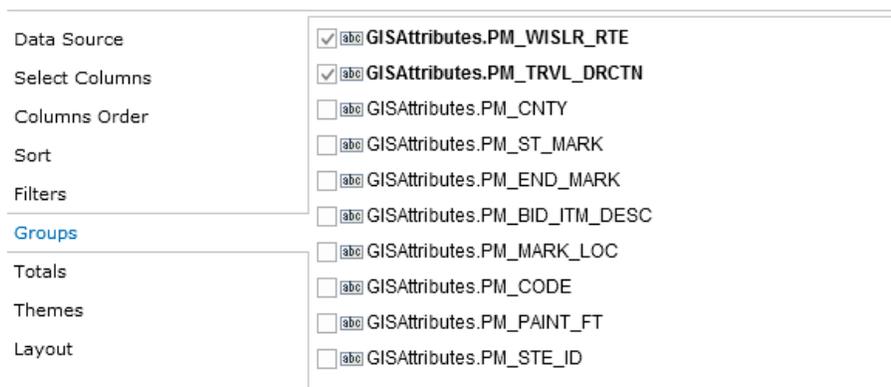


10. The next part of the wizard, is the **Sort** section. If you would like the data sorted in a particular order, set the sort here. Click on the **Add Sort** button. In the Field Box [No Sorting] dropdown, click the arrow to the right. Then double click on the field. Note: You may need to open a table to see the fields. You can select Ascending or Descending. Then click the **Next** button.



11. The **Filter** Button is the section that would allow you to bypass doing a filter query before running the report. This is optional. To add a filter, click on the **Add Filter** button. The **Dynamic Report** is a little different in the setup. There is an option to do Value or Expression. If you wanted this report to only use one set filter, use the Value option for **Field Is**. Data Type indicates what type of field it is. The Column field is where you select the table and field to condition against. You can then set the condition and the literal value. I left this feature blank. Click on **Next** to move to the next section.

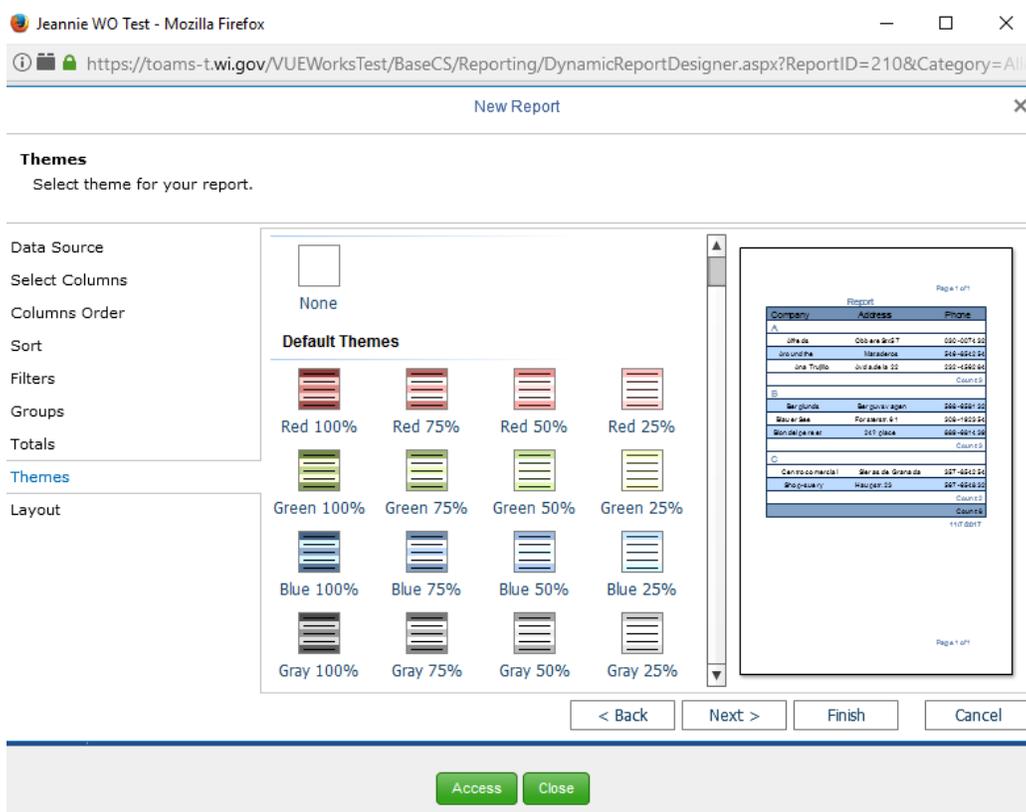
12. If you would like to create a grouped report, the **Groups** section will allow you to identify which field or fields to create a group band. The hierarchy does matter in the way the report will be formatted. The top one will be the outer or higher-level grouping.



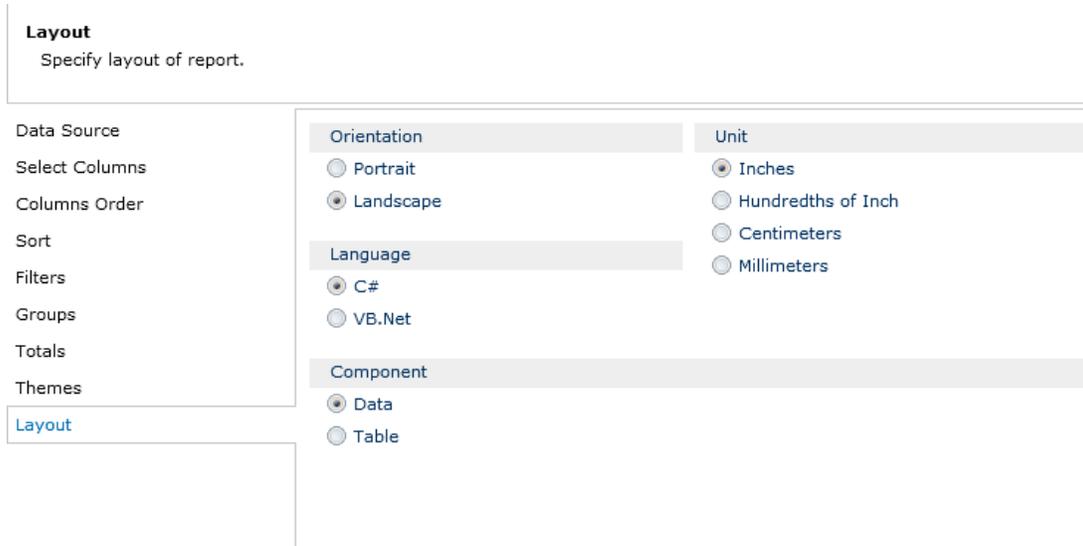
13. The **Totals** section is the next part of the wizard. In this section, identify any field you would like summarized. You can select several summary options. The pull-down list will display the options relative to the field type. You can have multiple summary fields. Once completed, click on the **Next** button.

Data Source	Column	Function
Select Columns	PM_WISLR_RTE	[None]
Columns Order	PM_TRVL_DRCTN	[None]
Sort	PM_CNTY	[None]
Filters	PM_ST_MARK	[None]
Groups	PM_END_MARK	[None]
Totals	PM_BID_ITM_DESC	Sum
Themes	PM_MARK_LOC	[None]
Layout	PM_CODE	[None]
	PM_PAINT_FT	[None]

14. The **Theme** section gives you an option to select a pre-defined template for background color and look as well as data row distinction. Select one of the themes or none and click on the **Next** button.

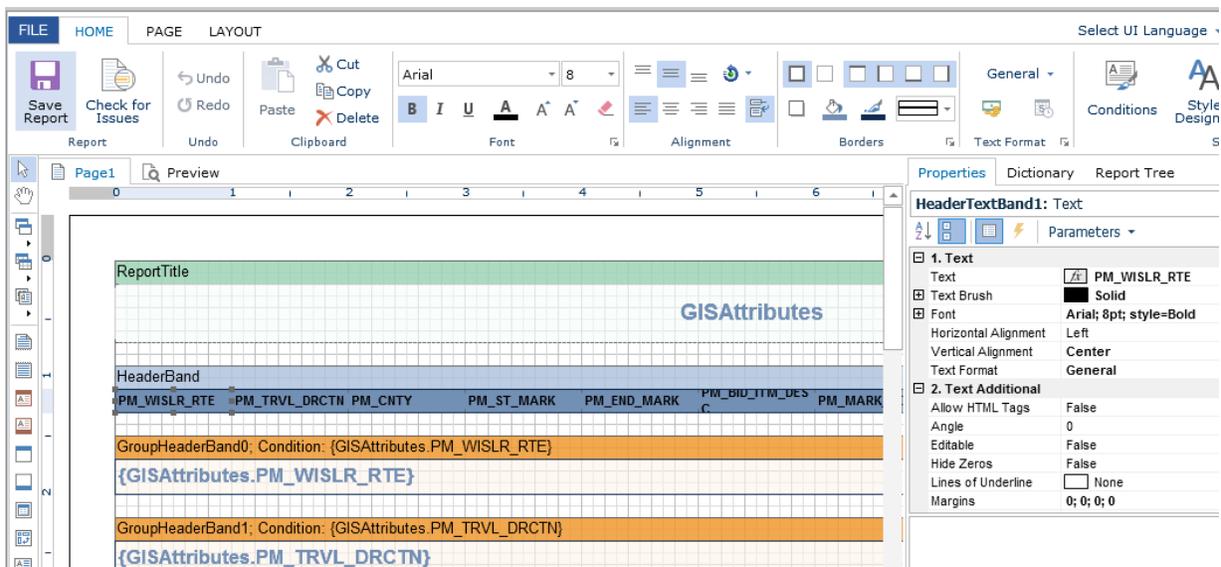


15. The final section is the **Layout**. In this area, you can change the orientation of the report and whether you use the regular data layout or a table structure look and feel. The other items should be unchanged. Use the defaults. Click on the **Finish** button and the system will generate the report.

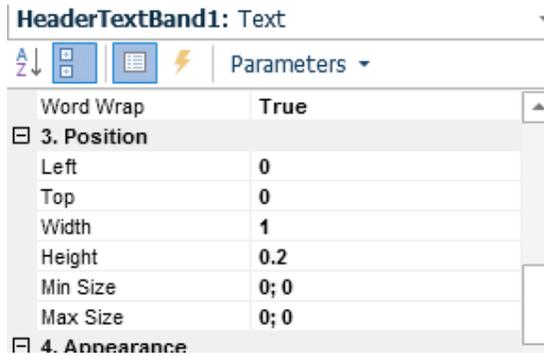


16. The Report will view in Design Mode. Titles and widths can be changed here.

17. Click on what value you would like to change.



18. You can manually change the width or go to the box on the right. Click in the field you which to change. Widths can also be changed on the report. You can also highlight more than one field and change the width. You can also more column around. Any other features of the text box can be changed here too. I recommend changing the titles.



19. Click on the **Save Report** button and then you can preview by clicking on the Preview tab or close and run the report.

Green County Epoxy Before 2012

County	Route	Travel Direction	Starting PLM	Ending PLM	Bid Item	Marking Location	Marking Code	Painted Footage
STH 11								
East								
Green	STH 11	East	53.97	54.04	648.1020 Line Epoxy 4-h	Gore	Solid	370
Green	STH 11	East	53.97	54.04	648.1020 Line Epoxy 4-h	Gore	Solid	370
Green	STH 11	East	54.05	54.21	648.1020 Line Epoxy 4-h	Exit Ramp	Solid	845
Green	STH 11	East	63.21	63.24	648.1020 Line Epoxy 4-h	Right Turn Lane	Dotted 3' line, 9' gap	32
Green	STH 11	East	63.53	63.6	648.1020 Line Epoxy 4-h	Bypass Lane	Dash 12.5', 37.5' gap	92
West								
Green	STH 11	West	27.312	27.382	648.1020 Line Epoxy 4-h	Bypass Lane	Dash 12.5', 37.5' gap	66
Green	STH 11	West	30.242	30.322	648.1020 Line Epoxy 4-h	Bypass Lane	Dash 12.5', 37.5' gap	106

20. Additional Note: The **Access** button at the bottom will allow you to set permissions to an individual or role. It works like the **Traditional** report access option. Click on the **Users** or **Roles** on the left and click on the Right Arrow button to move them to the right and give them access.

