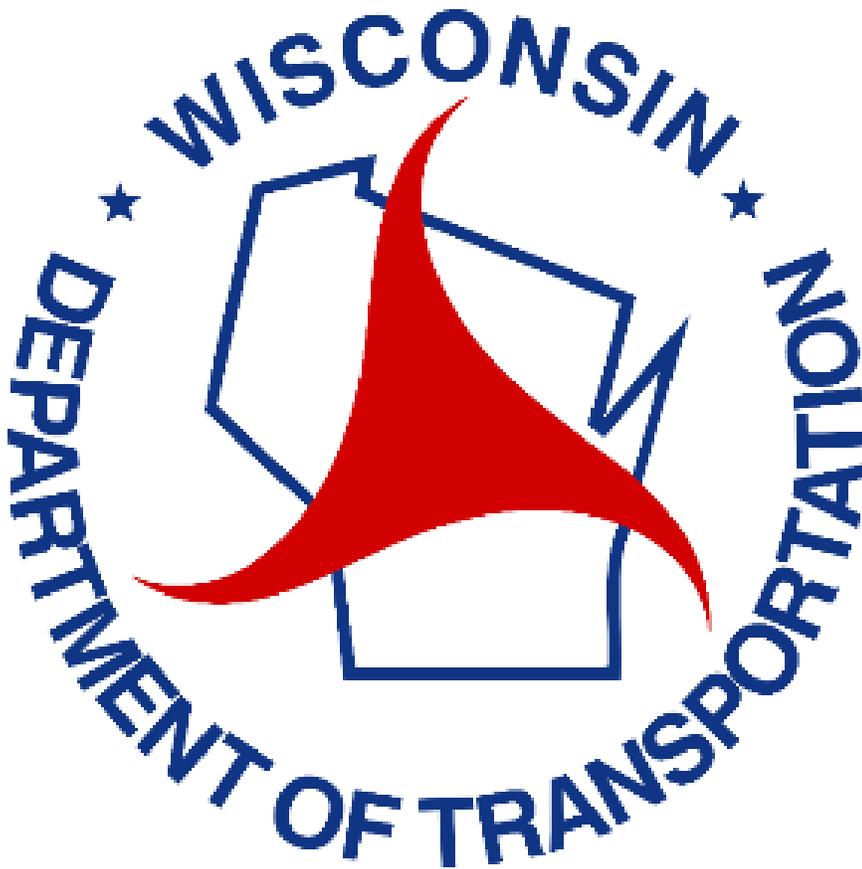


# TOAMS:

## Signing Training and User's Manual

Anything Highlighted in Blue would be BTO or Region Data Editor task.





# Table of Contents

TOAMS Signs: 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 .....7

    Data Viewer- Search Pages .....8

    Data Viewer- Search Filters .....9

    Filtering Further ..... 10

    Saving and Running a Search Filter ..... 11

    Reporting-General ..... 12

    Viewing Attribute Data for an Asset ..... 13

        Viewing Current Attribute Data .....13

        Viewing Work Orders from Cartegraph .....14

        Attaching a Document .....15

Updating Signs ..... 16

    Updating Sign Attributes .....16

    Physically Moving Signs in VUEWorks .....17

Creating Reports ..... 19

    Generate a Standard Report (Traditional) ..... 19

    Generate a Standard Report (Dynamic) ..... 23

Training Notes ..... 30





## Getting Help

Contact Mary Elizabeth with log in issues.

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

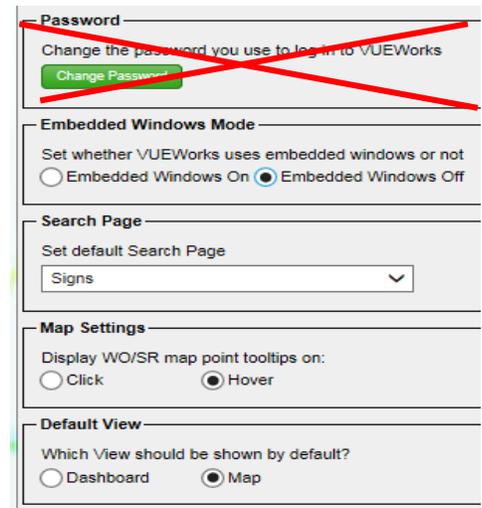
## Setting Preferences

Everyone can set individual 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 in the menu to expand. Then select the **Set Preferences** option.
2. The Set Preference window will open and the default VUEWorks Feature is **General**. On the General feature widow, you will see many options.



3. **Do not use the Password reset option** since you are using another system to manage the password.
4. 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 a different monitor.  
*Note: Currently Embedded Windows On works better.*
5. In the Search Page area, pull down on the list and select **Signs**.
6. Default View should be set to **Map**. Note: 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.
7. Click on the **Save** button.



## Searching, Filtering, and Viewing Assets

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

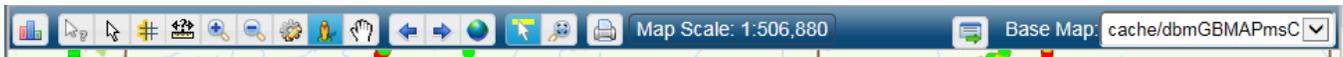
- The Map Feature
- Data Viewer Search Pages
- Data Viewer Search Filters

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.



**Show Dashboard:**  Dash board view

**Map tip:**  Display asset information by clicking the asset on the map.

**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.

**Select assets using buffer:**  Select all assets within a specific distance of an asset you select on the map.

**Measure:**  Find linear and area measurements.

**Zoom in/out:**  Zoom in or out of the map area by clicking on the map.

**Edit map:**  Add or edit features on the map, along with their attributes.

**Street view:**  Select a point on the map to display it in google street view.

**Pan map:**  Move up, down, left, or right on the map.

**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.

**Zoom to map extents:**  Zoom out of the map to its fullest extent.

**Highlight selected assets:**  Display yellow highlights on all selected assets in the Data Viewer selection set.

**Zoom to selected asset:**  Zoom to the location of the currently selected asset in the Data Viewer.

**Print map:**  Print the currently displayed map – just the area that is visible on the screen.

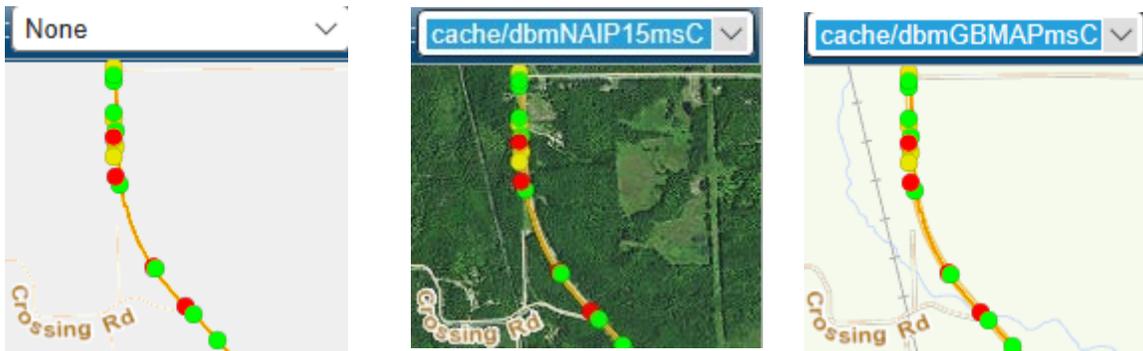
**Map scale:**  Displays the map.

*Note: Assets/Layers and work orders will only display on the map at a set scale.*

**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.



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

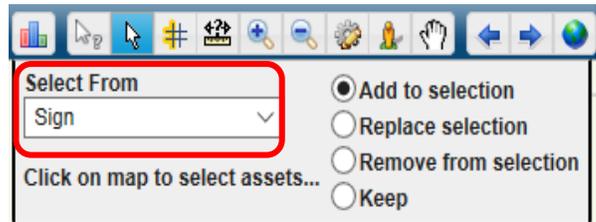


## Selecting Assets from the Map

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 on your mouse to zoom close to the assets you wish to select and click on the **Select Assets**  tool button.

*Note: If the map is not where you would like it, use the pan button  to move the map.*

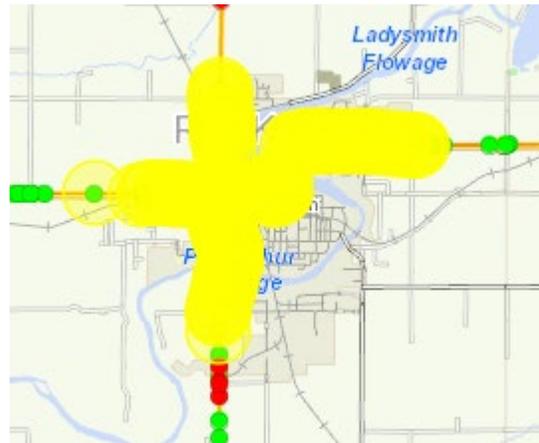
The Selection box will display. The default is **All Layers**. Change the **Select From** option using the drop-down arrow. Select **Sign**. The default option is **Add to selection** and will continue to add assets, as selected to the list. The other options are available by clicking on the radio button 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.



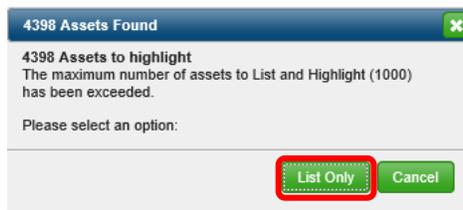
*Note: If you do not change **the Select From** to Signs it will be very slow. If you accidentally did this click the green  in corner of the popup dialog box.*

The Selection will be highlighted in yellow and the assets will be displayed in the Data Viewer.

195 Assets Selected			
	Asset ID	Layer	Lo
1	<a href="#">1163527809</a>	Sign	USH 8, 020.410
2	<a href="#">1288802854</a>	Sign	STH 27, 066.22
3	<a href="#">140496154</a>	Sign	STH 27, 098.00
4	<a href="#">1560507027</a>	Sign	STH 27, 097.97
5	<a href="#">1582241537</a>	Sign	STH 27, 065.71
6	<a href="#">1713540787</a>	Sign	STH 27, 096.63
7	<a href="#">2058053652</a>	Sign	STH 27, 066.22
8	<a href="#">2090117377</a>	Sign	STH 27, 096.49



**Warning:** There will be times in which your search will produce such a large selection, the system will prompt you to list only.



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

## Data Viewer- Search Pages

The data viewer will display a default search page. In the set preferences, you can set which search page to default to. 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 selected values to show up in the search.

**S Signs**

- Search for Signs by Location -

County  
Barron

Route  
USH 53

Crossroad

- Search for Signs by Details -

Sign ID

Material ID

Sheeting Type

Select Locate Clear

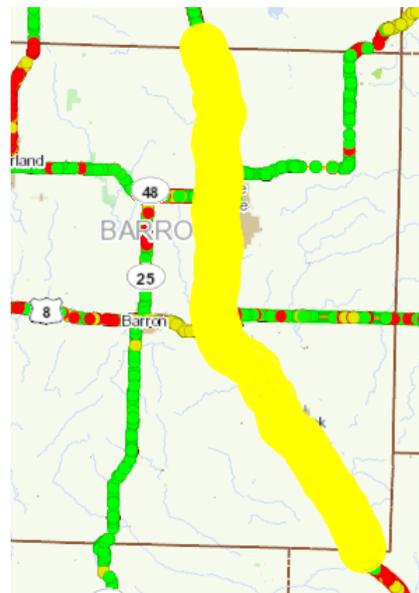
2. Once the field or fields have been entered, use the **Locate** button to highlight the assets on the map. Click on the **Select** button to highlight them on the map *and* add them in the Data Viewer as a list of assets.

779 Assets Selected

	Asset ID	Layer	Loc
1	<a href="#">1000041902</a>	Sign	USH 53, 074.62
2	<a href="#">1000971159</a>	Sign	USH 53, 105.20
3	<a href="#">1001389072</a>	Sign	USH 53, 105.25
4	<a href="#">102881632</a>	Sign	USH 53, 105.28
5	<a href="#">1043639560</a>	Sign	USH 53, 128.96
6	<a href="#">1059717798</a>	Sign	USH 53, 121.19
7	<a href="#">1060132147</a>	Sign	USH 53, 074.61
8	<a href="#">1079285515</a>	Sign	USH 53, 129.00
9	<a href="#">1089904091</a>	Sign	USH 53, 074.56
10	<a href="#">1106885400</a>	Sign	USH 53, 074.22
11	<a href="#">1116308766</a>	Sign	USH 53, 128.93

1 of 16

Multi-Edit

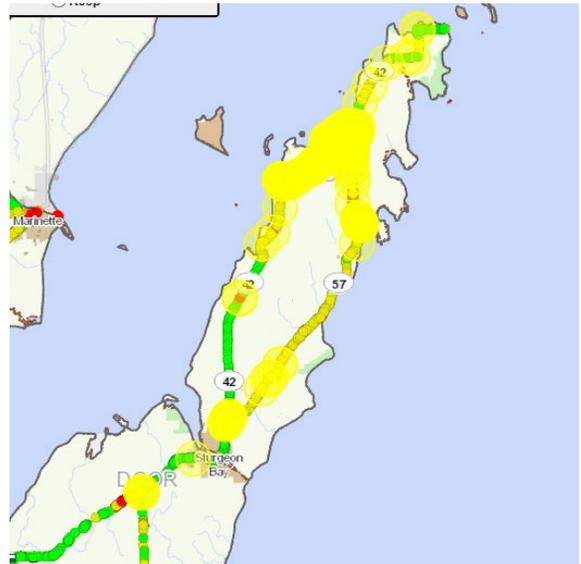


## Data Viewer- Search Filters

1. 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. Below is an example for searching for signs in a County and the year the sign was manufactured.
2. Set the Filter Options to **Add to current selection set**.
3. In the search criteria area, in the Table drop-down list select **Sign**.
4. In the Field drop-down list, select **County**.  
Note: It may take a few seconds for the Drop Downs to generate.
5. In the Operator drop-down list, select **Exactly Matches**.
6. In the Value field drop-down list, select **Door**.
7. The plus sign adds additional search criteria.
8. In the Table drop-down list select **Sign**.
9. In the Field drop-down list, select **Year Manufactured**.
10. In the Operator drop-down list, select **Less Than**.
11. In the Value field drop-down list, select **2005**.
12. When ready, click on the **Search** button. All assets meeting the criteria will be displayed in the data viewer. The assets will also be highlighted in the map area.

190 Assets Selected

	Asset ID	Layer	Loc
1	<a href="#">1027359428</a>	Sign	STH 42, 004.51
2	<a href="#">1076172873</a>	Sign	STH 42, 040.70
3	<a href="#">1093599487</a>	Sign	STH 42, 016.13
4	<a href="#">1098946284</a>	Sign	STH 42, 115.72
5	<a href="#">1105815073</a>	Sign	STH 42, 114.66
6	<a href="#">1152960825</a>	Sign	STH 42, 113.62
7	<a href="#">1154405854</a>	Sign	STH 57, 063.77
8	<a href="#">1283631933</a>	Sign	STH 57, 082.76
9	<a href="#">132252934</a>	Sign	STH 42, 129.48
10	<a href="#">1465602278</a>	Sign	STH 42, 111.60
11	<a href="#">1593756866</a>	Sign	STH 42, 114.43



## Filtering Further

VUEWorks allows sub searches. This can be done by clicking on the **Binoculars** icon from the selection list. In the Filter Options select either **Filter current selection set** to narrow down the selection set or **Add to current selection set** to add more assets to your selection list. Below will show you how to filter the selection for only Old signs in Door County on STH 42.

1. Set the Filter Options **Filter current selection set**.
2. In the search criteria area, in the Table drop-down list select **Sign**.
3. In the Field drop-down list, select **Route**.
4. In the Operator drop-down list, select **Exactly Matches**.
5. In the Value field drop-down list, select **STH 42**.
6. Click on the **Search** button.

190 Assets Selected

New Save Manage

Filter Options

Filter current selection set  
 Add to current selection set

Enter search criteria

Table: Sign

Field: Route

Operator: Exactly Matches

Value: STH 42

+ -

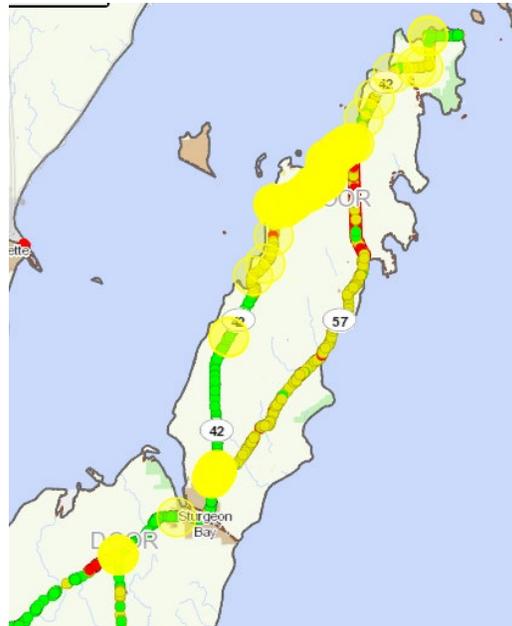
Search Reset Clear Back

140 Assets Selected

	Asset ID	Layer	Lo
1	<a href="#">1027359428</a>	Sign	STH 42, 004.51
2	<a href="#">1076172873</a>	Sign	STH 42, 040.70
3	<a href="#">1093599487</a>	Sign	STH 42, 016.13
4	<a href="#">1098946284</a>	Sign	STH 42, 115.72
5	<a href="#">1105815073</a>	Sign	STH 42, 114.66
6	<a href="#">1152960825</a>	Sign	STH 42, 113.62
7	<a href="#">132252934</a>	Sign	STH 42, 129.48
8	<a href="#">1465602278</a>	Sign	STH 42, 111.60
9	<a href="#">1593756866</a>	Sign	STH 42, 114.43
10	<a href="#">162629748</a>	Sign	STH 42, 113.53
11	<a href="#">1633583327</a>	Sign	STH 42, 090.62

1 of 3

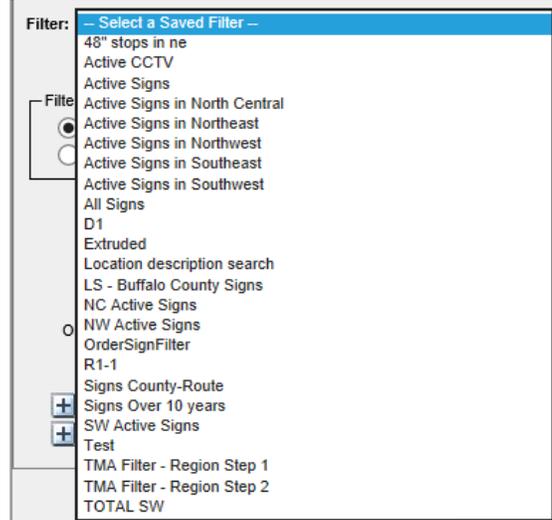
Multi-Edit



## Saving and Running a Search Filter

VUEWorks allows the saving of commonly used filter conditions.

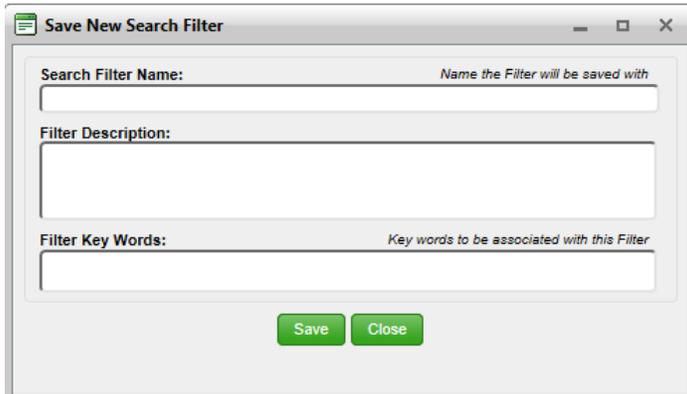
1. To run an existing search filter, click on the Binoculars. 
2. Click on the **Filter** drop-down and select the search that you would like to run. The Search criteria fields will auto populate with the saved filter criteria.
3. Click on the **Search** button to run the filter.  
*Note: Any drop down in the existing filters can be changed to meet your needs.*
4. To save a search filter, click the red x.
5. Click the binoculars again.



6. Select the filter you wish to edit or enter in a new one.
7. Enter in your search criteria.
8. Then click on the **New** button under the Filter list.



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



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

*Note: Saved Filters are not available to you until you close out of the data view and go back in.*

## Reporting-General

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 **Field Inventory 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 created by DTS and **Dynamic** reports are reports someone in the Region/BTO created. For the Field Inventory Report, click on the **Traditional** tab, **Signs** and the list of reports are displayed.
4. Click on the **County Field Inventory Report**.
5. Then click on the  button. The report will open in a separate browser window. Note: It only displays the first page of the report.



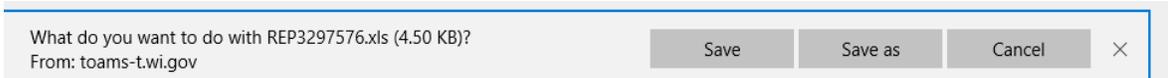
**County Field Inventory Report**

County	Route	Nearest Crossroad	Photolog Marker	Material ID	Sign Width (in)	Sign Height (in)	Year Mfg	Mfg Code	Substrate	Sheeting Type	Order Line 1	Order Line 2	Order Line 3
Brown	IH 43		014.380 mi	M1-94	84	21	2017	"F" (3M Sheeting)	Plywood	Prismatic High Intensity-Type HP	Shadow Ln		
Brown	STH 96		028.730 mi	R2-1 24W x 30H 35	24	30	2000	"F" (3M Sheeting)	Sheet Aluminum	Engineer Grade	35		
Brown	STH 29	CTH Y	001.010 mi	R3-20-L 24W x 36H	24	36	2010	"F" (3M Sheeting)	Sheet Aluminum	Prismatic High Intensity-Type HP	Down Right Arrow		
Brown	STH 172		008.010 mi	R5-1A 36W x 24H	36	24	2016	"A" (Avery Dennison)	Sheet Aluminum	Prismatic High Intensity-Type HP			
Brown	STH 172	Ch YY- Pilgrim Way	000.000 mi	R5-1A 36W x 24H	36	24	2010	"F" (3M Sheeting)	Sheet Aluminum	Prismatic High Intensity-Type HP			
Brown	STH 29	CTH F	006.020 mi	R1-2 36W x 31H	36	31	2014	"F" (3M Sheeting)	Sheet Aluminum	Prismatic High Intensity-Type HP			

Report type: Pdf  

6. There are printing and saving options for all reports. The Report Type at the bottom of the screen lets you pick between PDF and Excel with Formatting.

\*Selecting **Excel with formatting** then select **Print**. A second dialog box will pop up. Select **Save as**. Select a location to save the file.



\*Selecting **PDF** then select **Print** will prompt you to a print screen. Select your desired printer.



## 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.

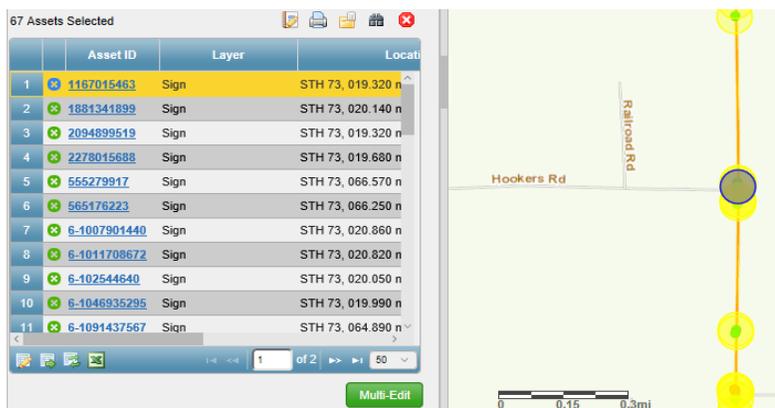
1. Use either the Data Viewer or Map to select assets. The Data Viewer will display the selected assets and they will appear highlighted on the map

Note: the following steps only work if it is less than 1000 assets.

2. A brief overview of the signs is shown in the Data Viewer.

	Asset ID	Layer	Location	Label
1	<a href="#">1000041902</a>	Sign	USH 53, Southbound - 074.640 mi	W13-1 18W x 18H 30
2	<a href="#">1000971159</a>	Sign	USH 53, Northbound - 105.200 mi	R2-1 24W x 30H 55
3	<a href="#">1001389072</a>	Sign	USH 53, Northbound - 105.250 mi	R5-1 30W x 30H
4	<a href="#">102881632</a>	Sign	USH 53, Northbound - 105.260 mi	R11-54-F 48W x 30H
5	<a href="#">1043639560</a>	Sign	USH 53, Northbound - 128.960 mi	R6-1-R 36W x 12H

3. In the Data Viewer, there is a column with **Asset ID** and one for **Layer**. If you click on the **Layer** for an asset in the list, the asset will be highlighted in blue. Clicking on another one will highlight that one in blue.



4. Clicking on the **Asset ID** link (in blue and underlined) will select and display the Attributes for that asset.
5. 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.



Note: The arrows will not go from sign to sign down the road.

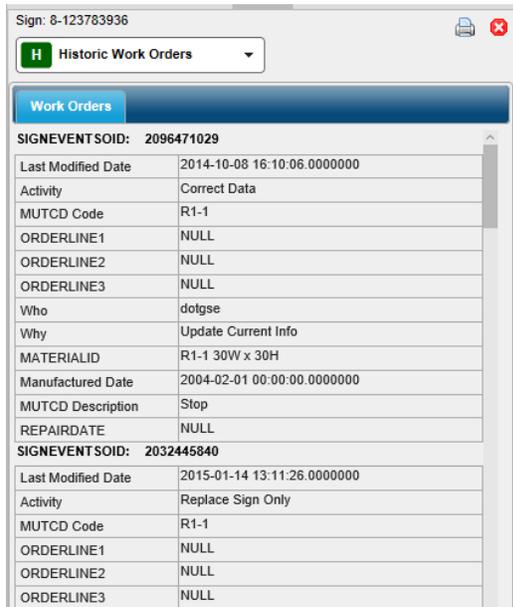
6. Assets can be sorted by clicking in the header, a white arrow will light up displaying how they were sorted.

	Asset ID	Location	Layer
28	<a href="#">2-57392</a>	STH 120, 009.120 mi - W3- Sign	
29	<a href="#">1193041115</a>	STH 120, 009.120 mi - W3- Sign	
30	<a href="#">2099837144</a>	STH 120, 009.210 mi - R2- Sign	

### Viewing Work Orders from Cartegraph

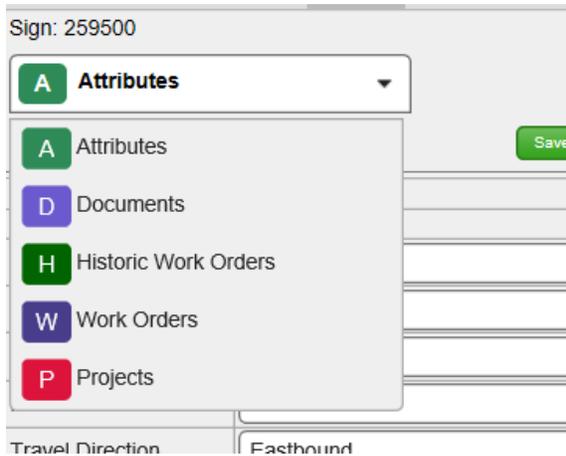
Viewing Historical work order information from the legacy system, CarteGraph is available and associated with each of the sign assets.

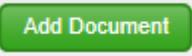
1. Select a sign you wish to view Work Orders on.
2. Select **Historic Work Orders** from the drop-down list.
3. Work orders in the CarteGraph system are displayed in chronological order. Key information is available. Use the scroll bar to see additional work order records.

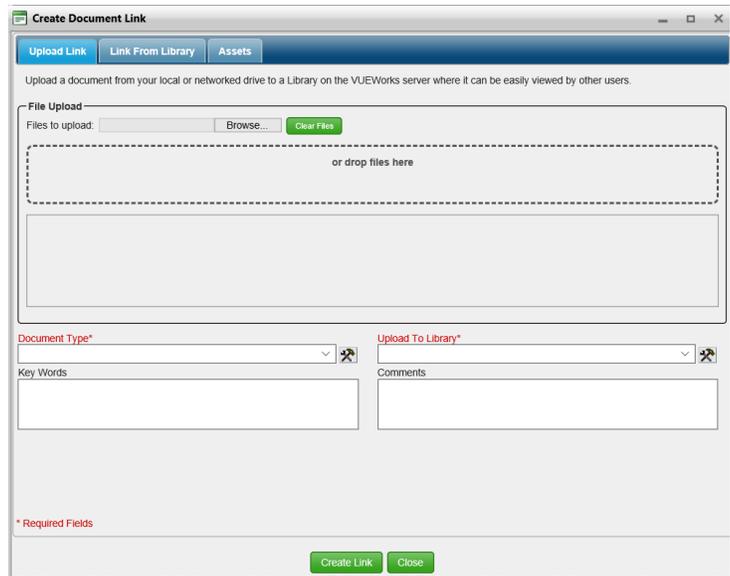


## Attaching a Document

1. Navigate to the Sign you would like to add a document to.
2. Select Documents from the Dropdown lists.



3. Click on the **Add Document**  button.
4. Click on the **Upload Link** tab at the top of the Create Document Link window.
5. Click on the **Browse** link.
6. Navigate to the file location and select the **Signs Order PDF** file.
7. In the **Document Type** drop-down list, select Document.
8. In the **Upload To Library\*** drop-down list, select the correct BTO SIGNS.
9. Click on the **Create Link** button and then click on the **Close** button.
10. The document is listed in the Document area for the work order.
11. Click on the **Create Link** button to save the work order and generate a work order number.

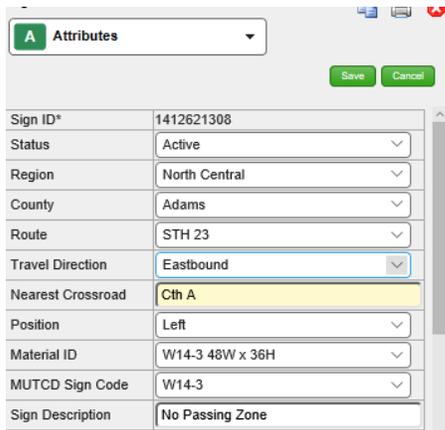


## Updating Signs

### Updating Sign Attributes

Once the route has been field verified, the Data Editors will update any records that are incorrect. Find the signs you wish to update. Use one of the filtering capabilities shown earlier to find the sign(s) that need(s) to be updated.

1. Enter in all the data that needs to be changed for that asset. Be sure all mandatory fields are filled in. **Do not make changes in the Gear Tool.** It does not always save.



A Attributes	
Sign ID*	1412621308
Status	Active
Region	North Central
County	Adams
Route	STH 23
Travel Direction	Eastbound
Nearest Crossroad	Cth A
Position	Left
Material ID	W14-3 48W x 36H
MUTCD Sign Code	W14-3
Sign Description	No Passing Zone

2. Select Save.
3. A Change Log Comment box will appear, enter in updated information, projects, or batch order. Then click ok.



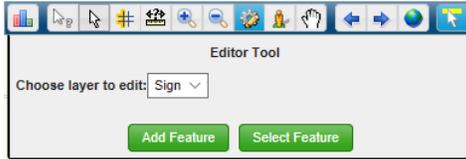
Change Log Comment

OK Cancel

## Physically Moving Signs in VUEWorks

If a new sign needs to be added or a sign needs to be moved to the correct location, VUEWorks offers a way to move assets on the desktop application from the map. Below are the instructions to move 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 **Sign**.



3. Then click on the **Select Feature** button and double click the sign with the mouse pointer. Once the asset is selected it will have a circle around it. You can then take that asset with the pointer and drag it to the new location. This is commonly done when assets are placed on top of one another or are in the incorrect location.



4. Sign Attributes **should not be** entered here.

Editor Tool	
Choose layer to edit:	Sign
<input type="button" value="Add Feature"/>	<input type="button" value="Select Feature"/>
<input type="button" value="Done"/>	<input type="button" value="Delete"/>
<input type="button" value="Cancel"/>	
Sign	
Sign ID	8-965418496
Status	Active
Region	Northwest
County	Barron
Route	USH 8
Travel Direction	Westbound
Nearest Crossroad	13th St
Position	Right
Material ID	R1-1 30W x 30H
MUTCD Sign Code	R1-1
Sign Description	Stop
Sign Classification	Regulatory
Width (in)	30
Height (in)	--

5. When the asset has been moved, click on the **Done** button. If further edits are needed use the Data Viewer to make changes.

Note: Clicking on the attribute field for Status will allow you to select **Retired**.

**Caution!!! Once the Status has been changed to Retired, it is very difficult to change back to Active.**

6. This same process could be used to add a new feature or asset. Instead, click on the Add Feature button and select where you want to drop the new sign. Add all the only the status and region. Then fill in the rest of the data in the Data Viewer.

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

## Adding Signs in VUEWorks

Below are the instructions to add an asset.

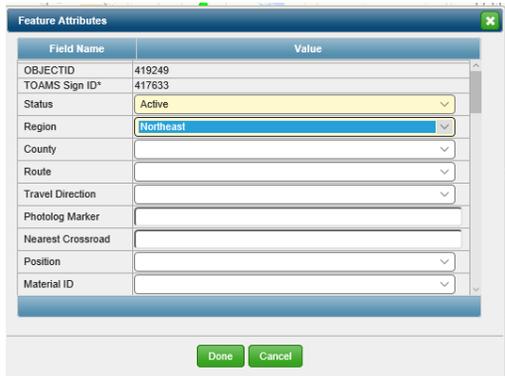
7. Click on the **Edit Map**  icon at the top of the Map Toolbar.

8. The Editor Tool will display at the top of the map area. On the Choose layer to edit drop-down, select **Sign**.



9. Then click on the **Add Feature** button and double click where you would like to add a sign.

10. The Feature Attributes dialog box will open. Only enter in the Status and Region.



Field Name	Value
OBJECTID	419249
TOAMS Sign ID*	417633
Status	Active
Region	Northeast
County	
Route	
Travel Direction	
Photolog Marker	
Nearest Crossroad	
Position	
Material ID	

11. Select the **Done** button.

12. Enter in the rest of the information in the Data Viewer.

Note: Clicking on the attribute field for Status will allow you to select **Retired**.

**Caution!!! Once the Status has been changed to Retired, it is very difficult to change back to Active.**

13. Then select the **Save**  button.

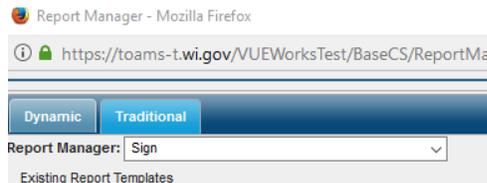
Note: **DO NOT** touch the latitude/longitude fields.

## Creating Reports

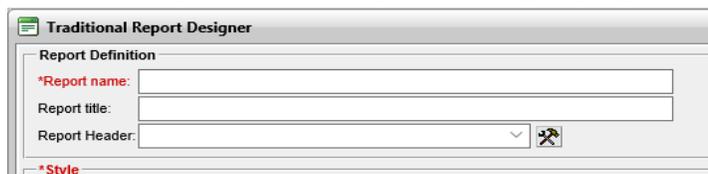
### Generate a Standard Report (Traditional)

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 selected and you wish to run a report on, you can select the  after a search is completed.
2. When the screen appears, go to the **Report** tab and select **Traditional** or Select **Traditional** if you selected the Report Icon.

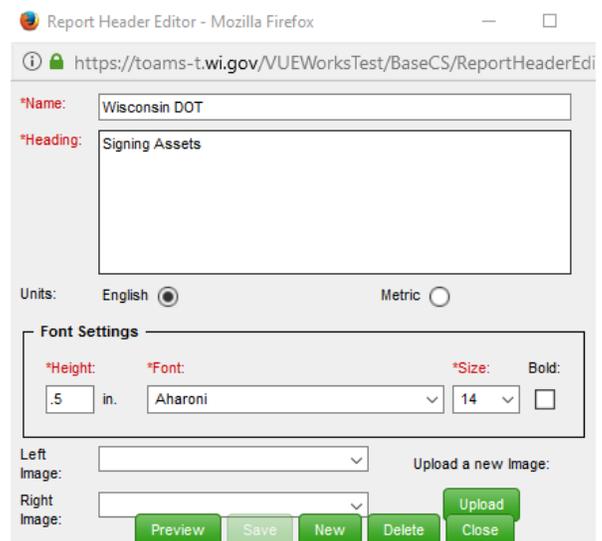


3. From the drop-down select **Signs**.
4. Traditional reports are generally tabular in structure and are great for lists, barcode printing, and data summaries. Click on the **New** button to create a traditional report. 
5. Enter in a Report Name. For Training purposes, put your FirstName-ReportName 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.

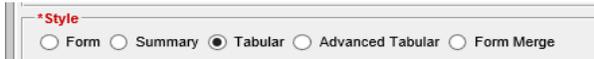


6. **Report Header:** This is a “running header” that appears above the title, such as your company name and location. It can be repeated on every page. To define a header, click the **Manage Headers** icon . The Report Header Editor dialog appears.

- 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.

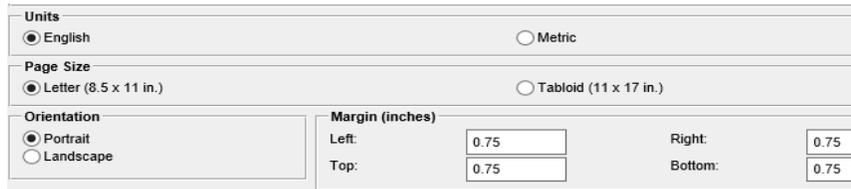
8. Leave **Units** as English.

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

10. Leave Margins as 0.75.

11. Change the **Orientation**

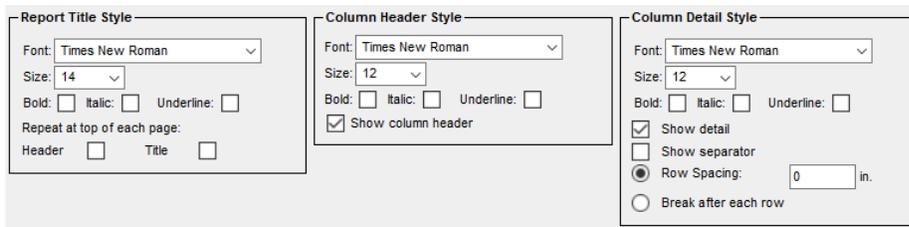
from Portrait to Landscape to provide more space for columns.



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

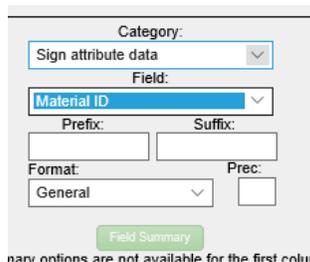


15. Press **Next** to view the next page where you specify what should be included in the report:

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.



18. Continue to add columns and fields to the report (some field types allow for summary options).

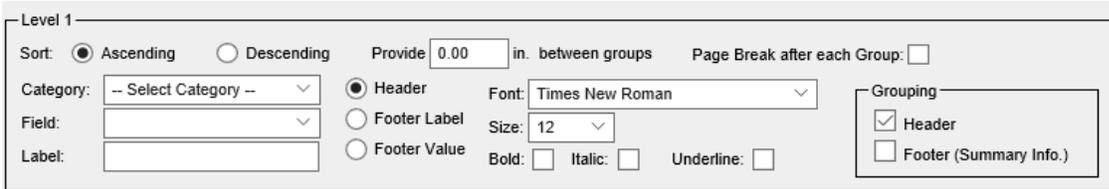
19. Click Field Summary.



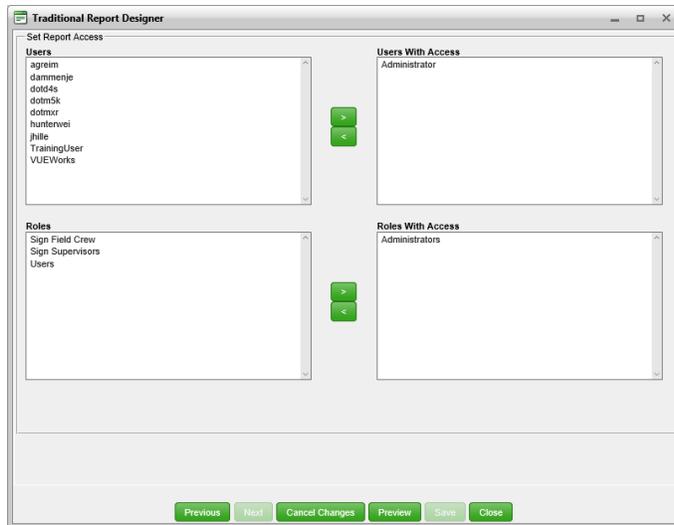
20. Fill in the boxes as appropriate.
21. When you have selected all the fields, click on the **Save** button. Save anytime you would like to preview the report.
22. The displayed columns can be formatted in terms of size/length, column title, and alignment. Select the column and then make the changes. Preview the results at any time. Saving is required before previewing.



23. 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.
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 **Edit** Tab. The Traditional Report Designer screen appears.
28. Enter any changes you have and hit save.
29. 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 .
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 Dynamic report.
4. A new Dynamic Report screen pops up. 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.

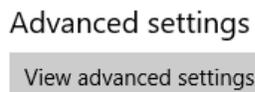
5. If the screen below pops up follow steps 6-9. If not skip to step 10.



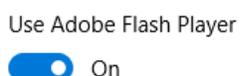
6. Click on the 3 dots in the upper right-hand corner of the browser.



7. Then click **settings**.
8. **View Advanced Settings**



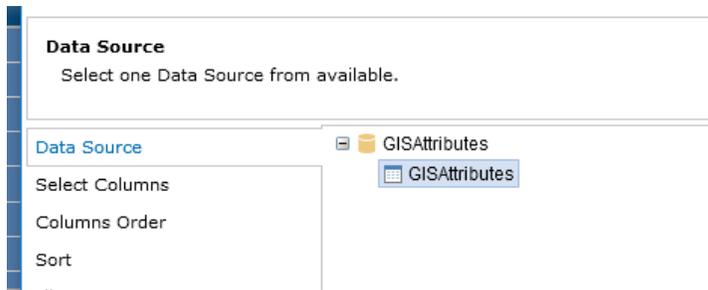
9. Change it to use Adobe Flash Player.



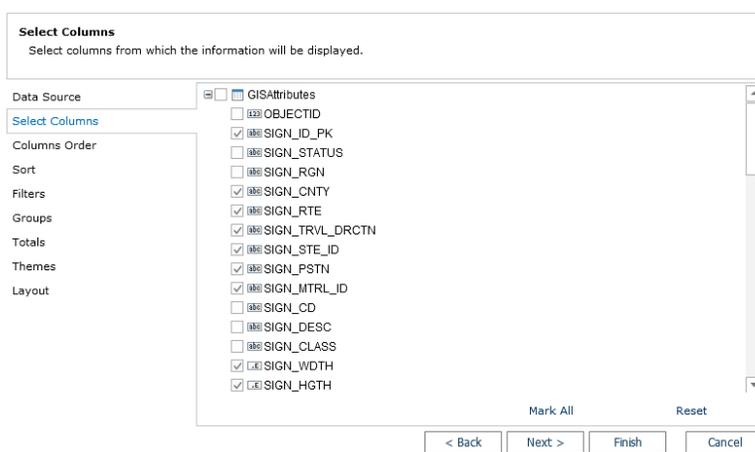
10. The Wizard will display after loading. **Select Using Report Wizard** and **Standard Report** are selected. Click the **Ok** button.



11. The Data Source option will display. Select GISAttributes and click the **Next** button.



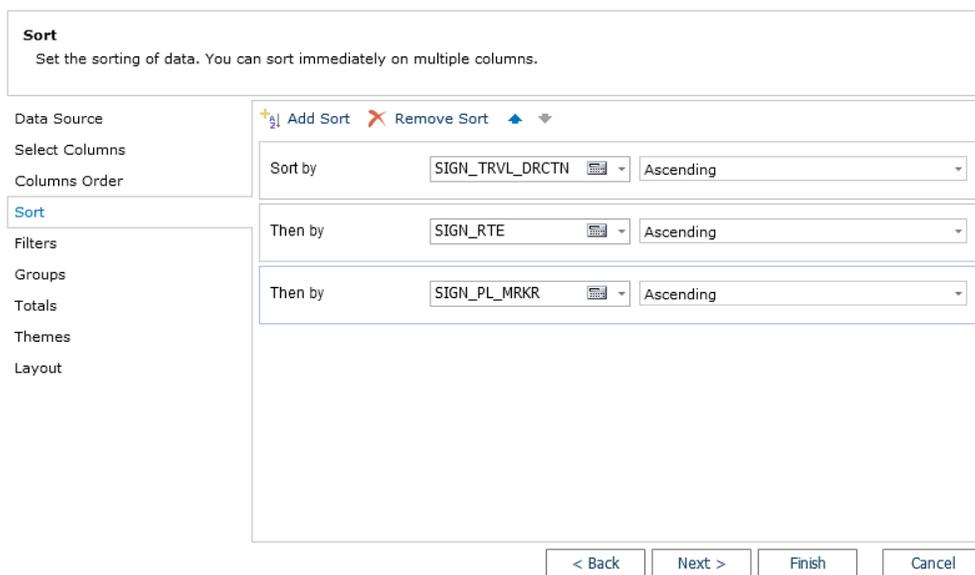
12. The Select Columns options will display. Check each field you would like included in your report. Then click on the **Next** button.



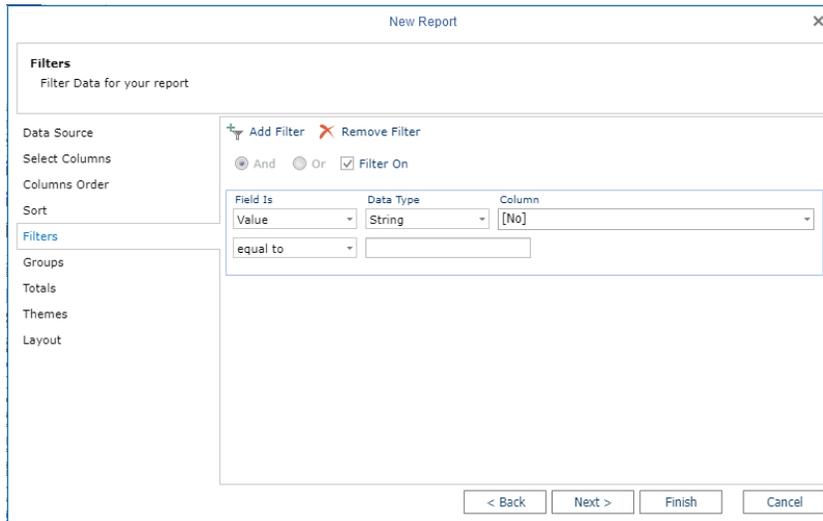
13. The **Column Order** section will display along with all the fields you selected previously. Use the **Up** and **Down** arrows on the right side of the window to arrange the fields in the order that you would like. This step here will save you a lot of time. They can be arranged once the report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



14. 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.




15. 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. Click on **Next** to move to the next section.



16. 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. In our example, we will click on the **GISAttributes.SIGN\_TRVL\_DRCTN**. Notice that it moved it to the top and selected it. You can have more than one grouping. The hierarchy does matter in the way the report will be formatted. The top one will be the outer or higher-level grouping.

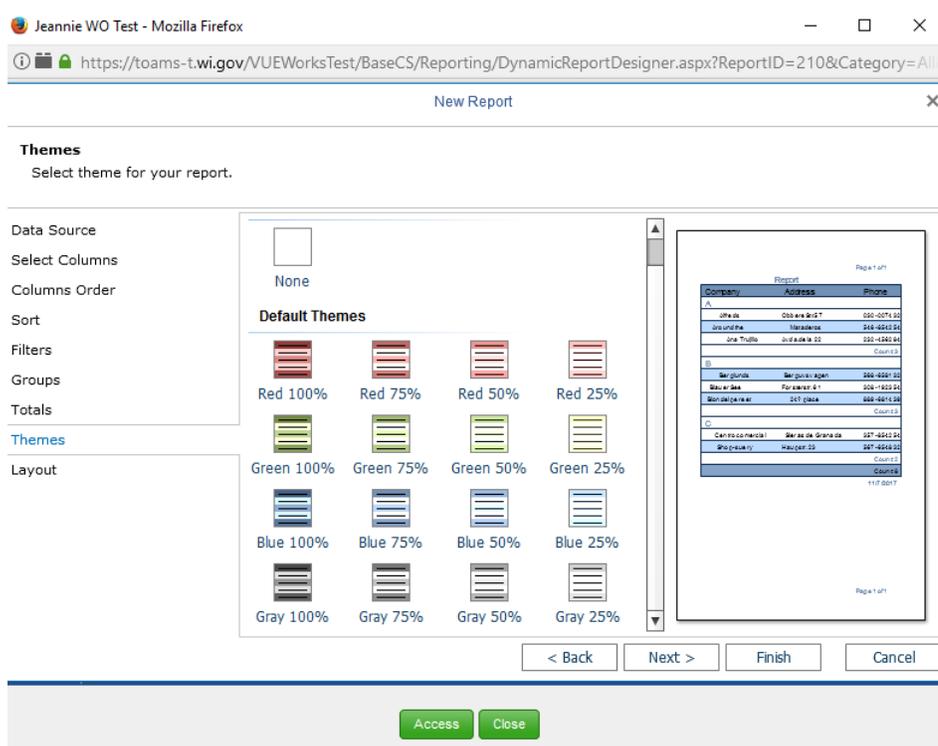


17. The **Totals** section is the next part of the wizard. In this section, identify any field you would like summarized. You can select several summary options. The pull-down list will display the options relative to the field type. You can have multiple summary fields. Once completed, click on the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

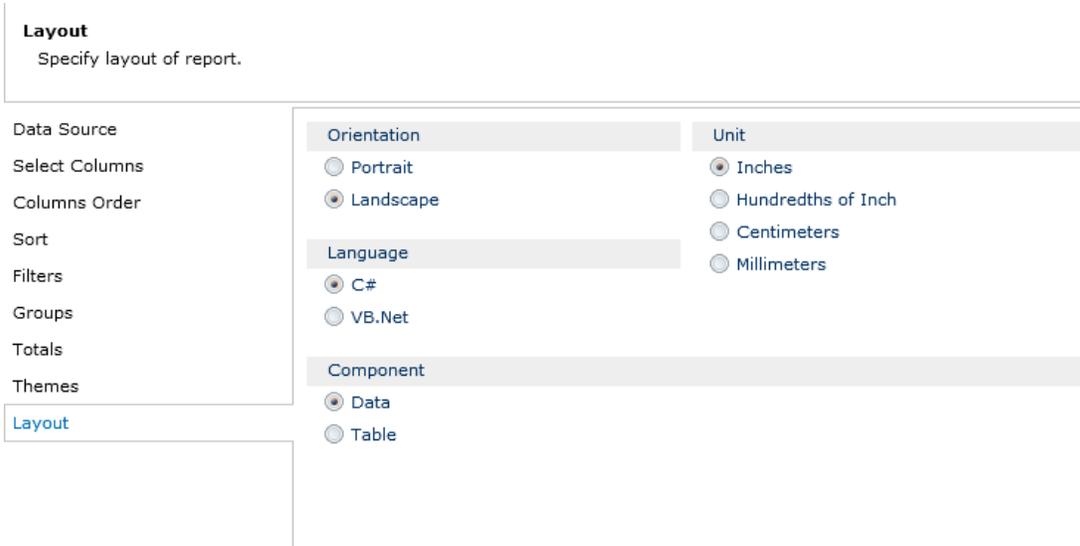
**Totals**  
Add summary information to your report.

Data Source	Column	Function
Select Columns	SIGN_TRVL_DRCTN	[None]
Columns Order	SIGN_SHTG_TYP	[None]
Sort	SIGN_RTE	[None]
Filters	SIGN_PL_MRKR	[None]
Groups	SIGN_MTRL_ID	[None]
<b>Totals</b>	SIGN_ID_PK	[None]
Themes	SIGN_RGN	[None]
Layout	SIGN_CNTY	[None]
	SIGN_STE_ID	[None]
	SIGN_PSTN	[None]
	SIGN_WDTH	[None]
	SIGN_HGTH	[None]
	SIGN_CSTRT	[None]

18. 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.

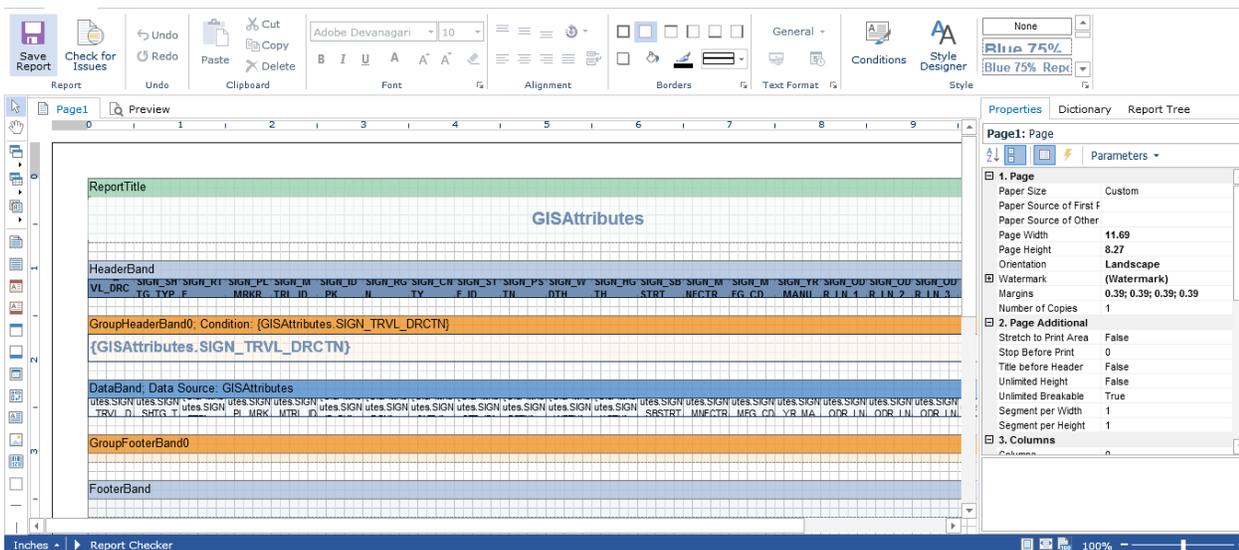



19. The final section is the **Layout**. In this area, you can change the orientation of the report and whether you use the regular data layout or a table structure look and feel. The other items should be unchanged. Use the defaults. Click on the **Finish** button and the system will generate the report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

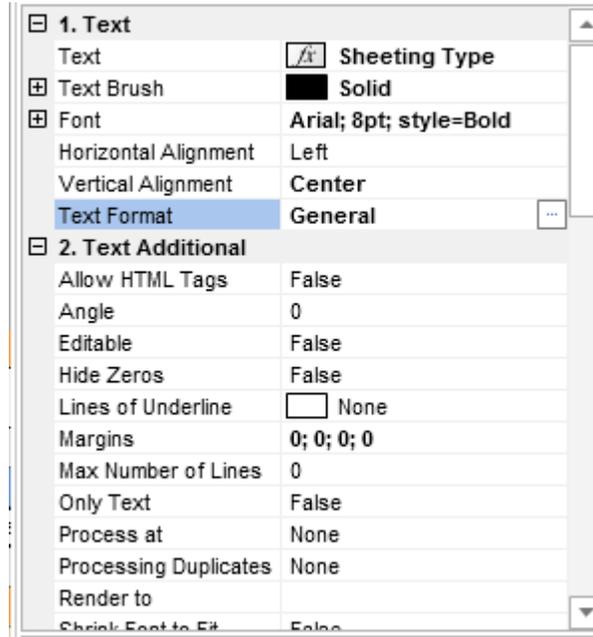


20. The Report will view in Design Mode. Titles and widths can be changed here.

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



22. 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.



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

**Signs**

County	Route	Travel Direction	Photolog	Material ID	Width	Height	Site ID	Position	Sheeting Type	Manufacture Code	Year Manufactured	Order Line 1	Order Line 2	Order Line 3	Support 1	Support 2
<b>EB</b>																
Adams	STH23	EB	002550 mi	W14-3 48Wx 36H	48	36	5th Dr	Left	Flourescent-Type F	"A" (Avery Dennison)	2016				Posts Wood 4x6-inch x 14-FT	
Adams	STH23	EB	003440 mi	J1-1 24Wx 39H	24	39	CTH G	Right	Prismatic High Intensity- Type HP	"A" (Avery Dennison)	2014	JCT	G		Posts Wood 4x4-inch x 14-FT	
Adams	STH23	FR	003710 mi	J4-1 24Wx 36H	24	36	CTH G	Right	Prismatic High Intensity- Type	"A" (Avery Dennison)	2014	FA RT	23		Posts Wood	

24. 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.

