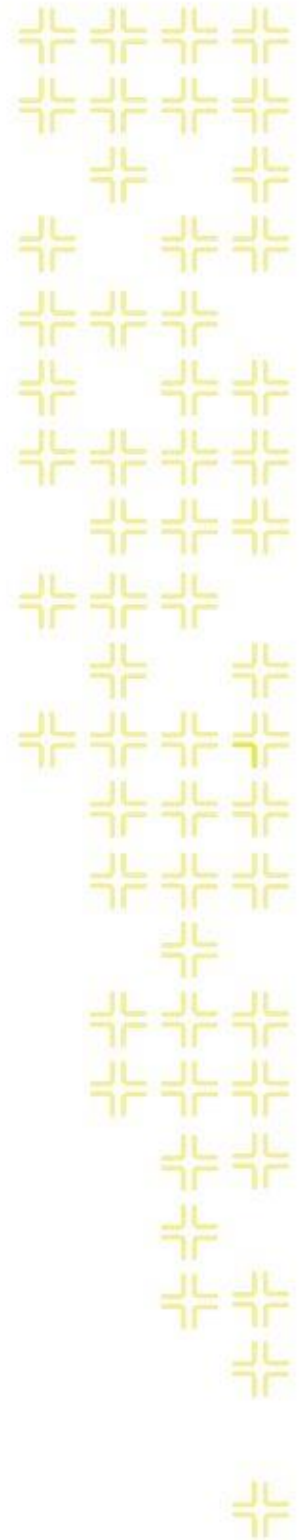




TRAINING GUIDE

Mobile for Administrators

Part 2 - Views Grids Forms



Mobile for Administrators – Dashboards, Views, and Forms

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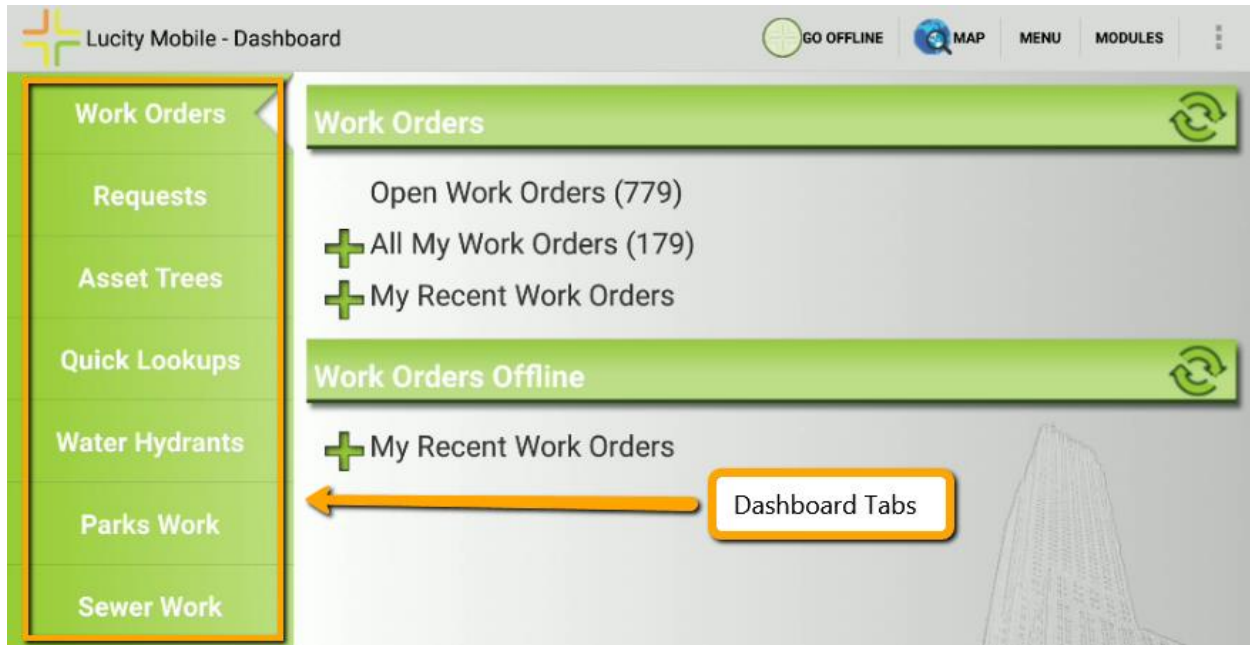
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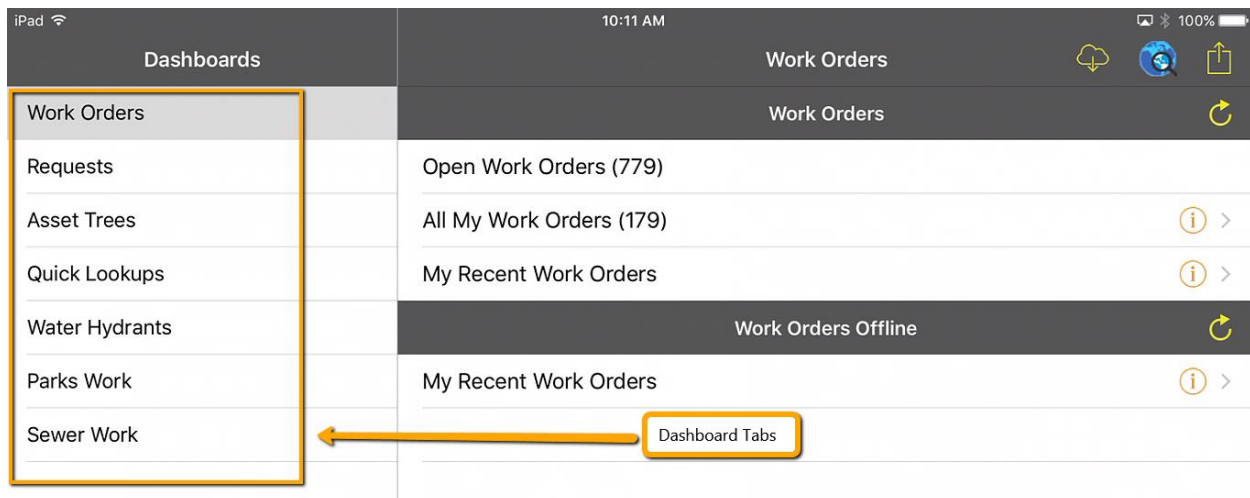
Dashboard

The dashboard is comprised of multiple dashboard tabs which appear on the left side of the page:

Android

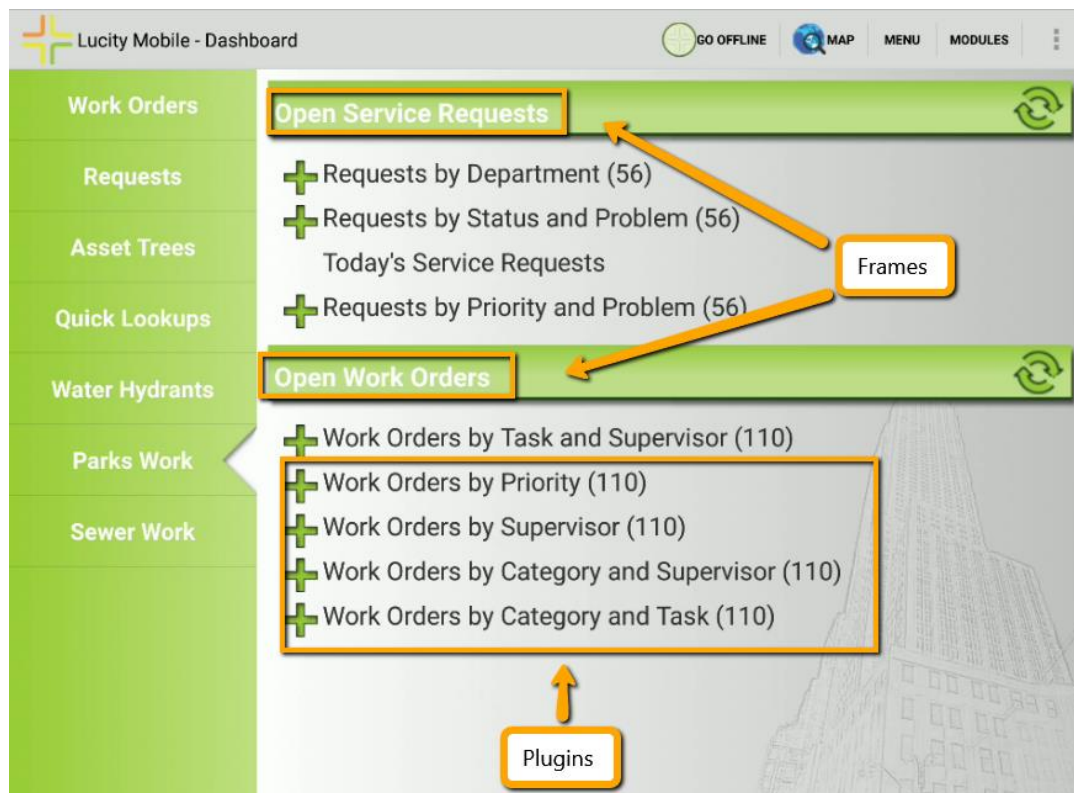


iOS

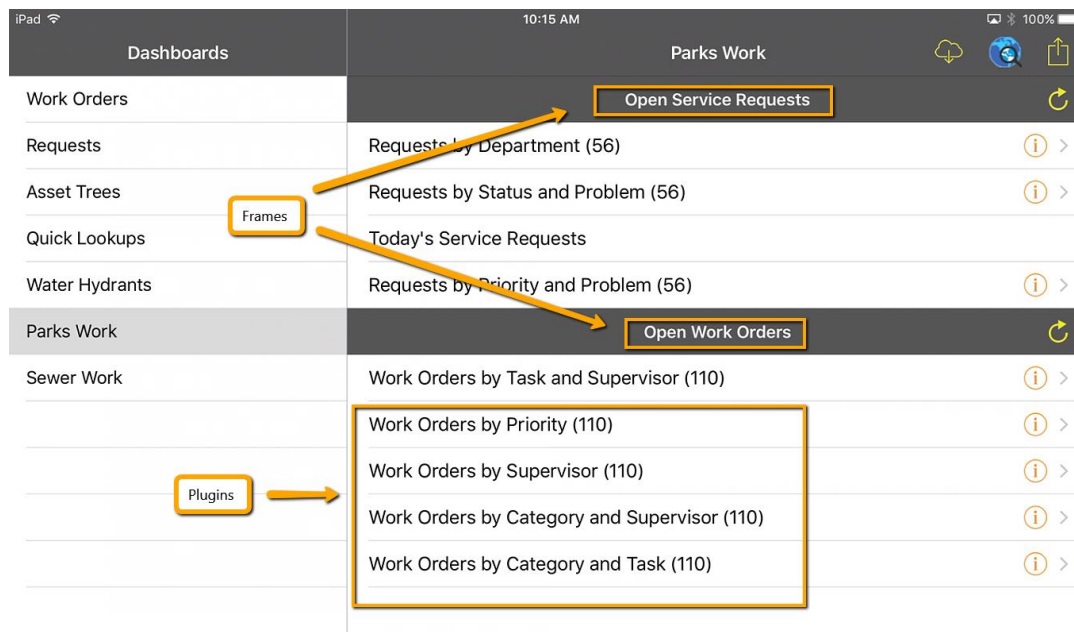


Selecting a tab from the left side will display the contents of that tab. Within each tab are Frames containing various plugins: Asset Trees, Data Drills, or Quick Lookups. Reports, links, maps, and embedded urls are not supported in the mobile dashboards.

Android



iOS

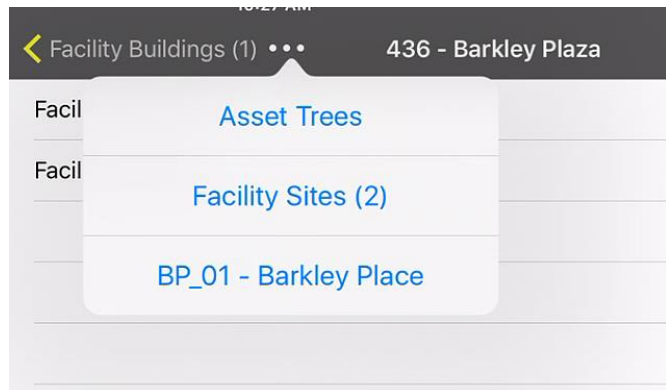
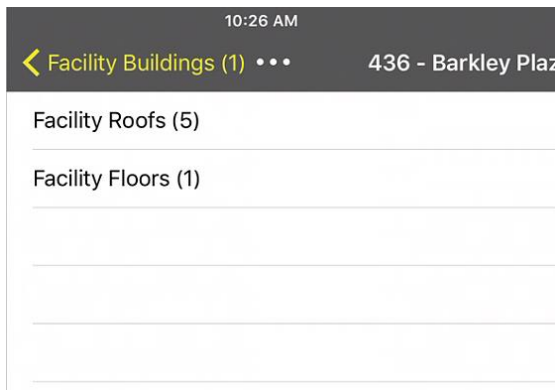


Asset Trees and Data Drills

In the Lucy Mobile Android application, asset trees and data drills are displayed in a tree format.

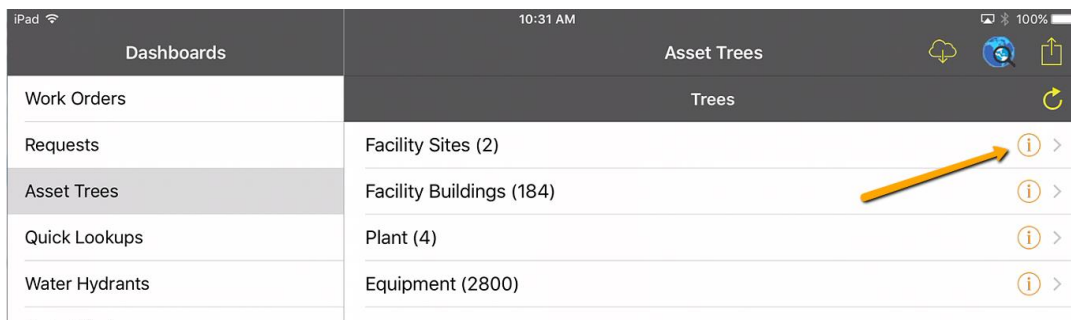


In iPad and iPhones, asset trees and data drills are show in hierarchical views.

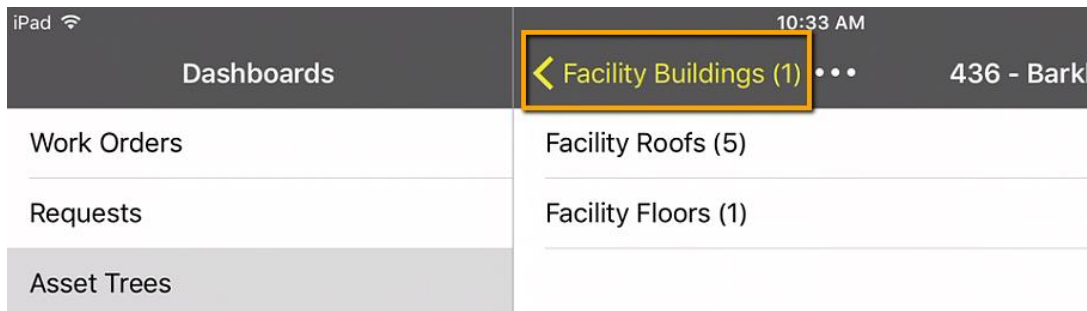


To drill into a data drill or asset tree item to see its children on Android, tap the **+**. It will expand into a tree format which can be collapsed and expanded by tapping on the Plus or Minus.

To drill into a data drill or asset tree item in iOS, tap the **i**. This may vary based on iOS version.

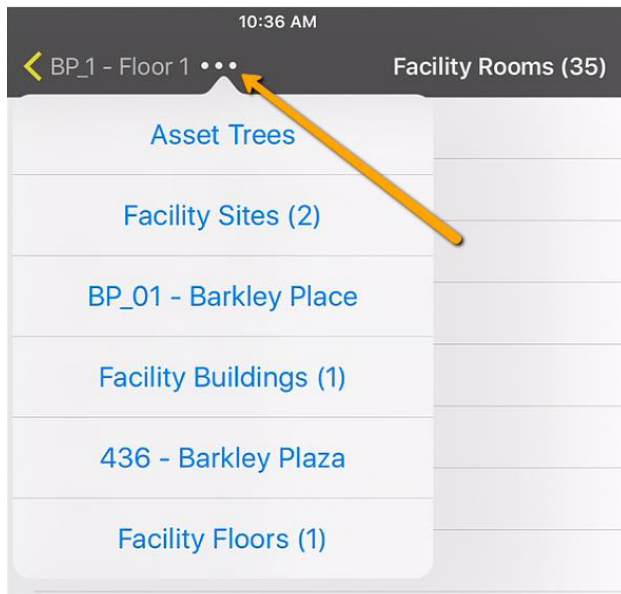




iOS only shows one level at a time. The parent level (Facility Buildings) is displayed here:



To navigate back up to the parent, tap on this parent navigation item. In the above screen capture “Facility Buildings (1)”.

If you are nested several levels deep in the asset tree in iOS, a “...” will display. Tapping the “...” will display the entire parent hierarchy to make it easier to jump up to grand parent or great grandparent levels:



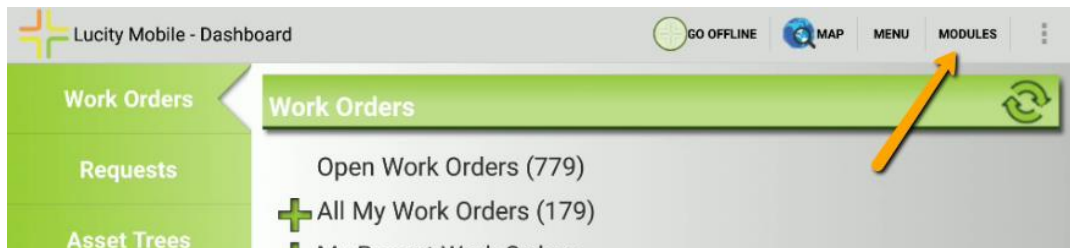
To launch a view from an asset tree or a data drill, tap the item (anywhere but the  or ). This will open a view (grid) to show the relevant records.

Notes: _____

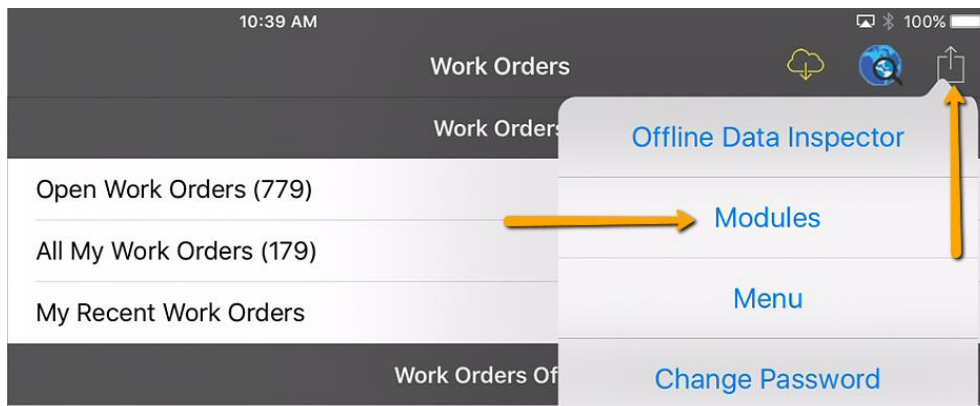
Modules Menu

It is a good idea to configure user's dashboards to show the modules they typically will be accessing out in the field. It is a fast way to launch views to the pre-filtered relevant data for that user. To access views that are not in the dashboard or to access view data that is not in a dashboard frame, you can open the modules menu. In Android, this is accessed from the **MODULES** button on the dashboard. In iOS, it is accessed from **Modules** in the menu.

Android



iOS



The modules menu screen will show all modules which the user has available to them. If the user has Run permissions to the module and belongs to a group that has permissions to the default view for the module, it will be available in the menu. From here, the user can also access the recent modules to quickly jump into modules that have recently been opened. On Android this shows recent modules opened from the modules menu or from the dashboard. On iOS this shows the recent modules opened from the modules menu.

Notes: _____

Android:

Available Modules	Recent Modules
<ul style="list-style-type: none">+ General+ Environmental+ Sewer+ Storm+ Environmental Compliance+ Transportation+ Water+ Electric+ Tree/Park+ Fleet+ Plant/Equipment+ Facility+ Refuse/Recycle+ Work+ Warehouse Inventory+ System Configuration	<ul style="list-style-type: none">Sewer Pipes

iOS:

iPad 10:43 AM 100%	
Dashboard Modules	
All Modules Recent Modules	
General	
Customers	
Customer Addresses	>
Customer Contacts	>
Parcels	>
Street Name	
Street Name List	>
Street Name Directions	>
Street Name Prefixes	>
Street Name Suffixes	>
Street Name Types	>
Street List Alias	>
Custom	
Custom Inventories	>

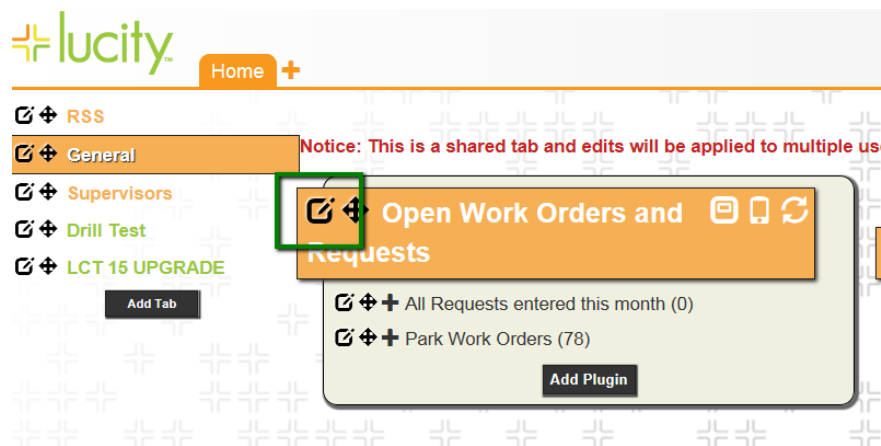
Configuring Dashboards for Mobile Use

Configuring dashboards for use in the field is very similar to configuring them for use within Lucy Web. Configuring dashboards is beyond the scope of this session, but we will cover some topics specific to mobile (particularly offline mobile).

Users will use the same dashboard for Lucy Mobile that they use for Lucy Web, but you can configure individual frames to be accessible in the web or be accessible in mobile (or both). By default new frames are used by both mobile and web.

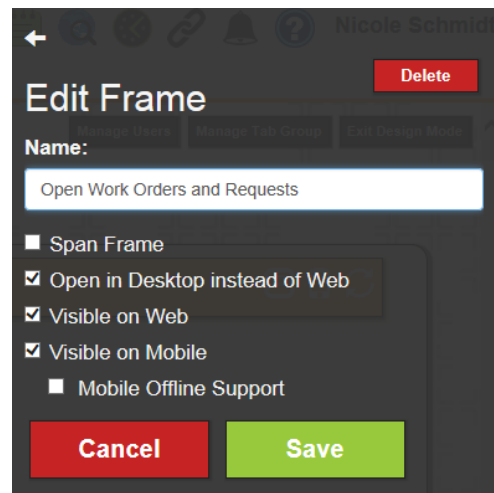
To edit your own dashboard, click Enter Design Mode and click the edit button for the frame you want to edit:

Enter Design Mode



Be aware that if you are changing a shared tab, you will be changing this setting for all users of that shared tab.

Change the setting to make it hidden or visible on the mobile device.













Dashboards will lay out differently on mobile than they will on the web application. Span Frame, for example, is not relevant on the mobile dashboard. All dashboard frames will appear stacked in a single column for each dashboard view.

Android



iOS

Open Service Requests		
Requests by Department (56)		>
Requests by Status and Problem (56)		>
Today's Service Requests		
Requests by Priority and Problem (56)		>
Open Work Orders		
Work Orders by Task and Supervisor (110)		>
Work Orders by Priority (110)		>
Work Orders by Supervisor (110)		>
Work Orders by Category and Supervisor (110)		>
Work Orders by Category and Task (110)		>

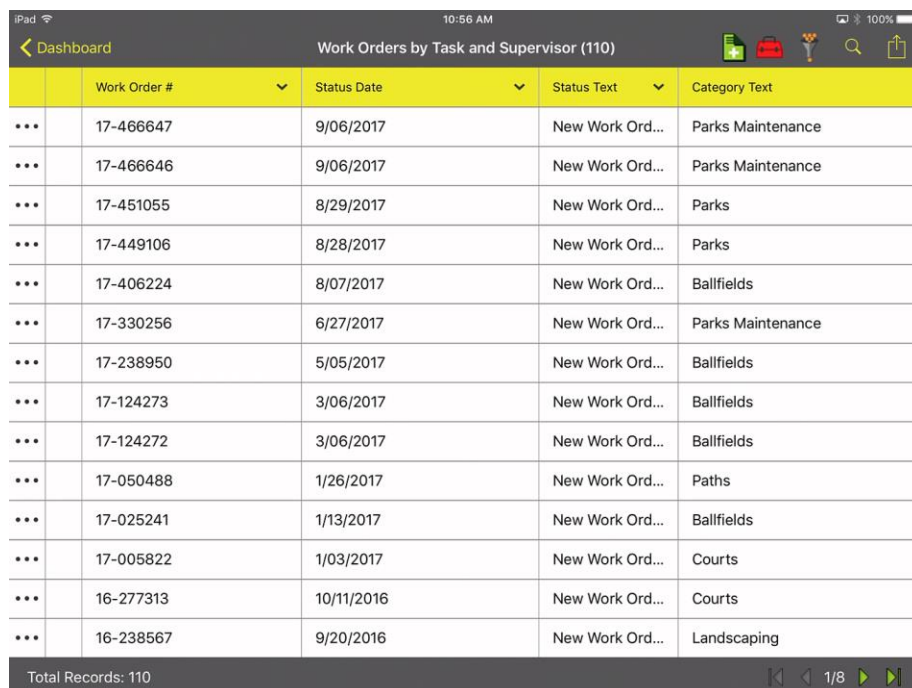
Mobile Views

Views in the iOS and Android application contain the same data as views defined in the web application. The Android application shows the data in a single page list view that requires no scrolling:



Work Order #	Category Text	Main Task Text	Problem Text
2014-00879	Call Center	Assigned Crew Text: Status Date: 06/16/2014	Matt Problem
2014-00878	Sewer Manhole	Assigned Crew Text: Status Date: 06/12/2014	Supervisor Text: Start Date:
2014-00877	Admin	Assigned Crew Text: Status Date: 06/12/2014	Supervisor Text: Start Date:
2014-00876	Sewer Manhole	Assigned Crew Text: Status Date: 06/12/2014	Info - Wastewater
2014-00875	Storm Pumps	Assigned Crew Text: Status Date: 06/11/2014	UTILITY LOCATIONS

In the iOS app, the default view is a grid that scrolls up and down/left and right with data on a single line for each record:



Work Order #	Status Date	Status Text	Category Text
17-466647	9/06/2017	New Work Ord...	Parks Maintenance
17-466646	9/06/2017	New Work Ord...	Parks Maintenance
17-451055	8/29/2017	New Work Ord...	Parks
17-449106	8/28/2017	New Work Ord...	Parks
17-406224	8/07/2017	New Work Ord...	Ballfields
17-330256	6/27/2017	New Work Ord...	Parks Maintenance
17-238950	5/05/2017	New Work Ord...	Ballfields
17-124273	3/06/2017	New Work Ord...	Ballfields
17-124272	3/06/2017	New Work Ord...	Ballfields
17-050488	1/26/2017	New Work Ord...	Paths
17-025241	1/13/2017	New Work Ord...	Ballfields
17-005822	1/03/2017	New Work Ord...	Courts
16-277313	10/11/2016	New Work Ord...	Courts
16-238567	9/20/2016	New Work Ord...	Landscaping

In this default view, the width of columns in the iOS application can be customized when designing grids. By default the application uses the length of field as calculated from the maximum number of characters allowed. For date time fields it uses a value of 100. For Booleans the default is 75. In the above screen cap you may choose to make the category text and work order field smaller through this configuration to allow for more columns to display at any one time on the grid. This is accessed from

the forms>>Grid Manager menu in Lucity Administration tools or by clicking Edit when editing the View from the Forms>>View/Form Manager dialog

Grid Name Storm Conduits

Grid Type Storm Conduits **Caption** **Page Size** 10

Description

Column Editor

Available Columns

- Active
- Alternate Zone
- Alternate Zone Text
- Bottom Width
- Cleaning Freq
- Cleaning Freq Units
- Cleaning Freq Units Text
- Consequence of Failure
- Created By
- Creation Date Time
- Default W/D Cat
- Default W/D Cat Text
- Depth
- Document Available
- Down Top
- Downstream Elevation
- DS Last PACP Date
- DS Pipe O&M
- DS Pipe Structural

Selected Columns

- US Structure
- DS Structure
- Conduit Rec #
- Alt Conduit ID
- Basin
- Con. to Sewer
- Owner
- Owner Text
- Location
- Location Text
- Surface
- Surface Text
- Type
- Type Text
- Pipe Shape
- Pipe Shape Text
- Material
- Material Text
- Dia/Height (in)

Properties

Display

Header US Structure

MobileWidth 10

Field CN_US_STR

MobileWidth

Override width for mobile grids.
Default is: Boolean 75, Date and t...

Help

Mouse over a control to see its description.

☒ **Offline Mobile**

Manage Buttons

Help **Save** **Cancel**

Changes to these settings require a cache reset.

Notes:

Alternate View in iOS

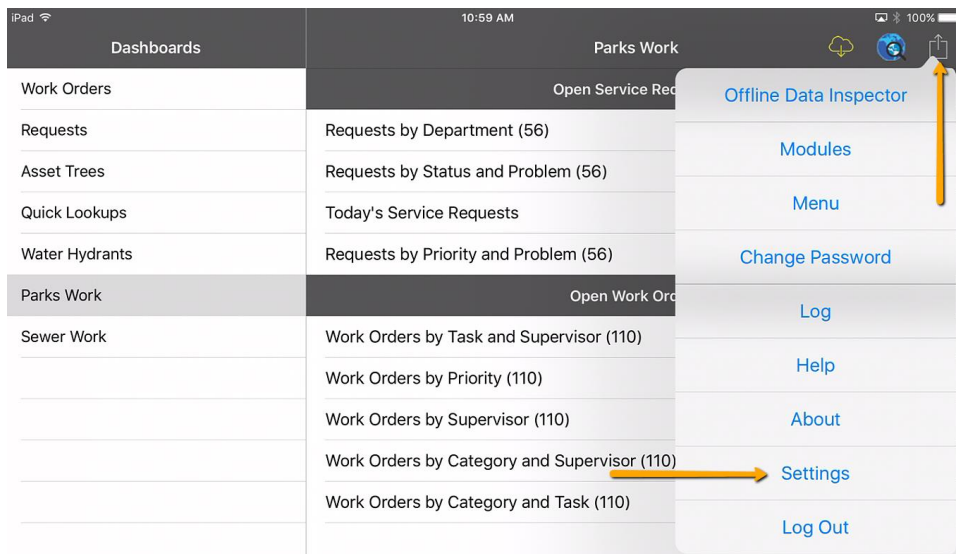
In the iOS app, there is an alternate view that also shows the data in a single page list view that requires no scrolling.



The screenshot shows the 'Work Orders by Task and Supervisor (110)' screen in the iOS app. The interface includes a top navigation bar with a 'Dashboard' button, the title 'Work Orders by Task and Supervisor (110)', and several utility icons. The main content area displays a list of work orders, each with a status icon (three dots), a work order number, a status date, a status text, and a category text. Below these details, there are fields for 'Problem Text', 'Main Task Text', 'Cause Text', 'System ID 1', and 'Lead Worker Text'. The list is paginated, showing 1/8 of the records. At the bottom, a status bar indicates 'Total Records: 110' and navigation controls for the list.

...	Work Order #:	Status Date:	Status Text:	Category Text:	Problem Text:	Main Task Text:	Cause Text:	System ID 1:	Lead Worker Text:
...	17-466647	9/06/2017	New Work Order	Parks Maintenance					
...	17-466646	9/06/2017	New Work Order	Parks Maintenance					
...	17-451055	8/29/2017	New Work Order	Parks				23	
...	17-449106	8/28/2017	New Work Order	Parks				29	
...	17-406224	8/07/2017	New Work Order	Ballfields					
...	17-330256	6/27/2017	New Work Order	Parks Maintenance					
...	17-238950	5/05/2017	New Work Order	Ballfields					
...	17-124273	3/06/2017	New Work Order	Ballfields	Routine Maintenance	Drag and Level			
...	17-124272	3/06/2017	New Work Order	Ballfields	Routine Maintenance	Drag and Level			
...	17-050488	1/26/2017	New Work Order	Paths					

To enable this view, on the Dashboard, go to Settings from the Menu:



And find the “Use Alternate View” setting. Toggle it on and then tap Done

GRID VIEW SETTINGS

Use Alternate View ☒

Paging

Both applications use paging and will only show a certain number of records at a time. The number of records shown can be modified in the settings:

Android

nicole Settings for Live

APPLICATION

Page Size
15

Enable Full Logging

iOS

NAME

Live

The user specified name that identifies this particular configuration.

HOST

Host

The path to the web server.

PAGE SIZE

15

The number of records that show up in a view.

To page through records, use the paging navigation on the lower right hand side. The iOS client also supports paging using a two-finger swipe.

Android

Reason Text: Status: 2	Lead Worker Text: Status Text: New Work Order	Assigned Crew Text: Status Date: 08/11/2014	Supervisor Text: Start Date:
Count: 5095 of 5095			

1/340

iOS

...	16-238567	9/20/2016	New Work Ord...	Landscaping
Total Records: 110				1/8

Refresh

To refresh the current data and get any new records that may have been added on the server since the view was opened, tap the refresh button.

In Android this is a refresh button on the toolbar

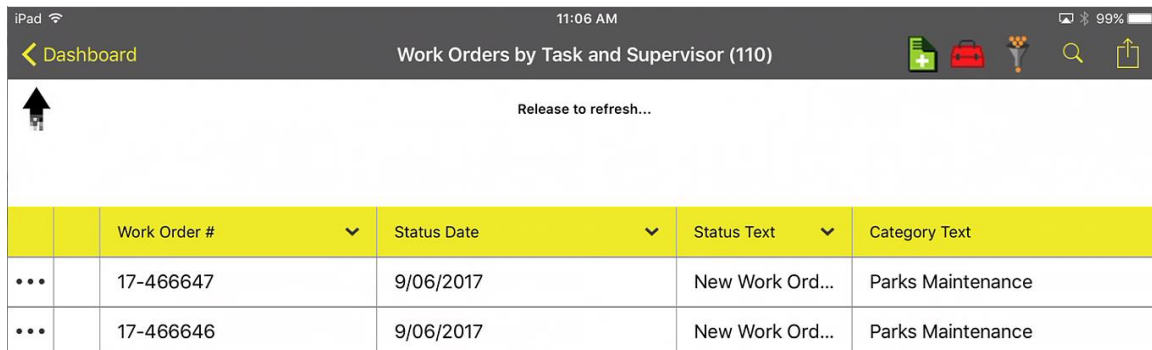


Work Orders by Task and Supervisor			
Work Orders by Task and Supervisor			
Work Order #: 17-466647	Status Date: 09/06/2017	Status Text: New Work Order	
Category Text: Parks Maintenance	Problem Text:	Main Task Text:	Lead Worker Text:
Cause Text:	System ID 1:		

In iOS, the refresh is in the view menu.

Dashboard			
Work Orders by Task and Supervisor (110)			
Work Order #	Status Date	Status Text	Refresh
17-466647	9/06/2017	New Work Ord	Dashboard
17-466646	9/06/2017	New Work Ord	Log
17-451055	8/29/2017	New Work Ord	Help
17-449106	8/28/2017	New Work Ord	

iOS also supports a pull down refresh.



	Work Order #	Status Date	Status Text	Category Text
...	17-466647	9/06/2017	New Work Ord...	Parks Maintenance
...	17-466646	9/06/2017	New Work Ord...	Parks Maintenance

Search

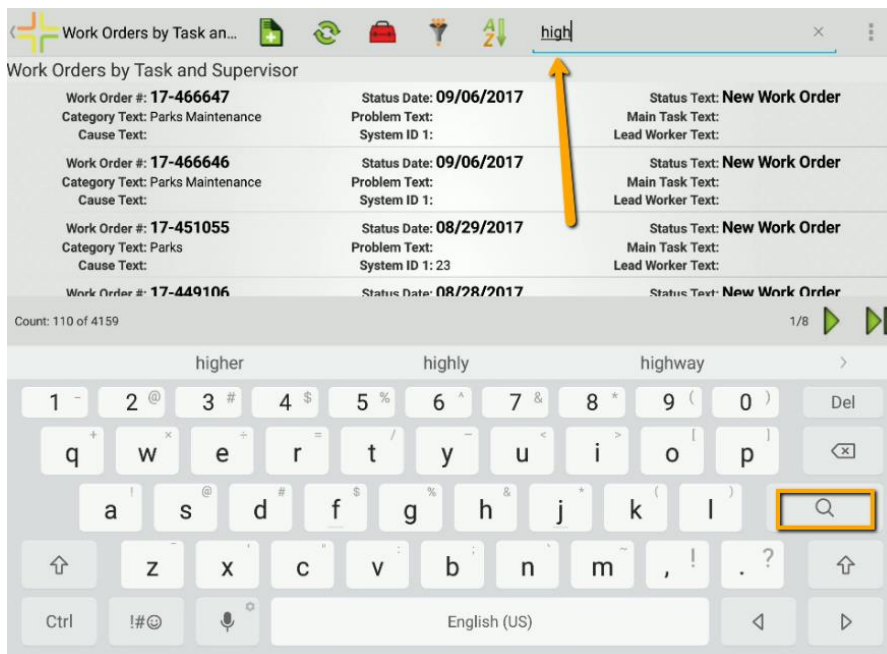
To quickly search for information, each view supports a search function. The search searches all visible columns in the view for all records in current context. This context may be records returned from a dashboard data drill or asset tree, or may be from a filter, or may be all records.

The search button is a magnifying glass in both applications

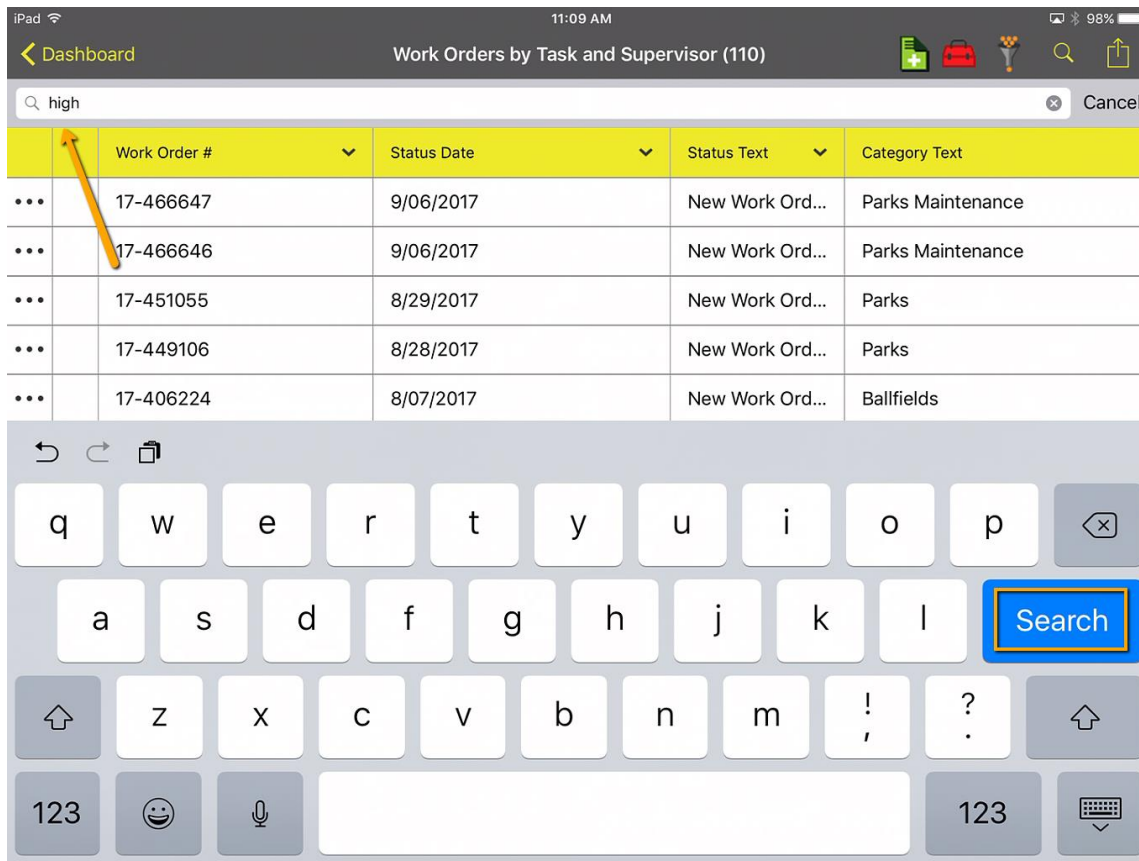


Once the desired search text is entered, tap the Search button or the magnifying glass on the keyboard to initiate the search.

Android



iOS



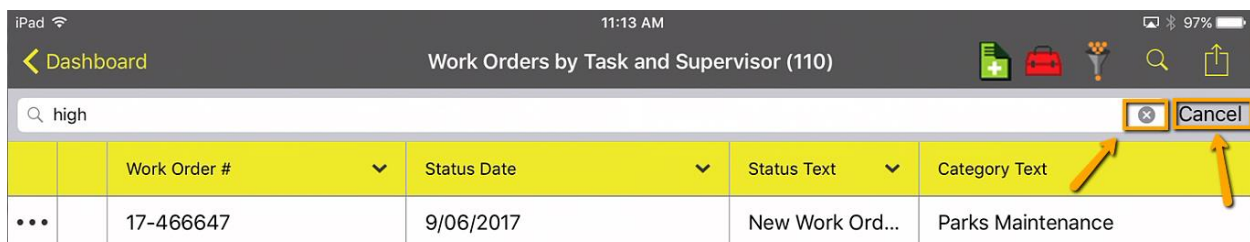
The paging works the same for both filtered and unfiltered data. To page through the filtered records use the record navigation at the lower right hand side of the form.

To clear a search in Android, tap the "X"




Tapping the "X" again will close the search prompt and display the search button again.

To clear the search in iOS, tap the "x" in the search field. To Cancel the Search, tap the Cancel button next to the Search field. This will clear the search and close the search prompt.



Sorting

To sort data in the grid in Android, tap the . Select the desired sort column:

Sort	
Choose a field:	
Category Text	<input type="radio"/>
Cause Text	<input type="radio"/>
Lead Worker Text	<input type="radio"/>
Main Task Text	<input checked="" type="radio"/>
Problem Text	<input type="radio"/>
Status Date	<input type="radio"/>
Status Text	<input type="radio"/>
System ID 1	<input type="radio"/>
Work Order #	<input type="radio"/>
Sort Z-A	Sort A-Z

And tap the Sort Z-A or Sort A-Z button depending on whether you want the data sorted ascending or descending.

To view the current sort column, tap the sort button. It will display the current sort column. Sorts are only supported for only column at a time. Selecting a new sort will clear the existing sort.

Main Task Text	<input checked="" type="radio"/>	
Problem Text	<input type="radio"/>	
Status Date	<input type="radio"/>	
Status Text	<input type="radio"/>	
System ID 1	<input type="radio"/>	
Work Order #	<input type="radio"/>	
Clear Sort	Sort Z-A	Sort A-Z

To clear the sort, tap the Clear Sort button.

In iOS, in the default view, sort data by tapping the column arrow

Dashboard Work Orders by Task and Supervisor (110)					
	Work Order #	Status Date	Status Text	Category Text	
...	17-466647	9/06/2017	New Work Ord...	Parks Maintenance	

and select Sort Ascending or Sort Descending

Dashboard Work Orders by Task and Supervisor (110)					
	Work Order #	Status Date	Status Text	Category Text	
...	17-466647	9/06/2017	Sort Status Text	Maintenance	
...	17-466646	9/06/2017	Sort Ascending	Maintenance	
...	17-451055	8/29/2017	Sort Descending		
...	17-449106	8/28/2017	Stop Sorting		
...	17-406224	8/07/2017		js	

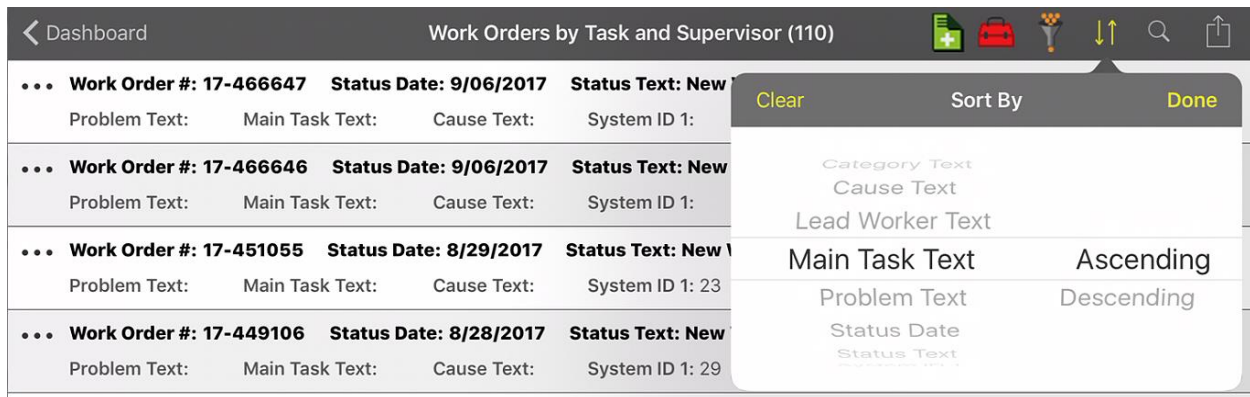
When a column is sorted, the column header text appears bolded and the column has a slightly darker color than the rest of the display

11:20 AM Work Orders by Task and Supervisor (110)		
Status Date	Status Text	
10/21/2015	WO On Hold	
8/19/2015	WO On Hold	
12/02/2015	WO On Hold	
2/04/2015	WO On Hold	
3/05/2015	WO On Hold	
5/05/2015	Wait for Resch...	

In iOS, in the Alternate View, the Sort button  is in the toolbar:


Dashboard Work Orders by Task and Supervisor (110)					
...	Work Order #: 17-466647	Status Date: 9/06/2017	Status Text: New Work Order	Category Text: Parks Maintenance	
	Problem Text:	Main Task Text:	Cause Text:	System ID 1:	Lead Worker Text:
...	Work Order #: 17-466646	Status Date: 9/06/2017	Status Text: New Work Order	Category Text: Parks Maintenance	
	Problem Text:	Main Task Text:	Cause Text:	System ID 1:	Lead Worker Text:

It provides a way to select the field and whether you want to sort ascending or descending:

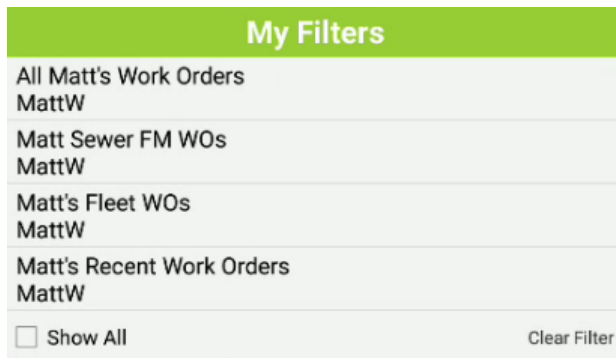


Clear the current sort by tapping the .

Filters

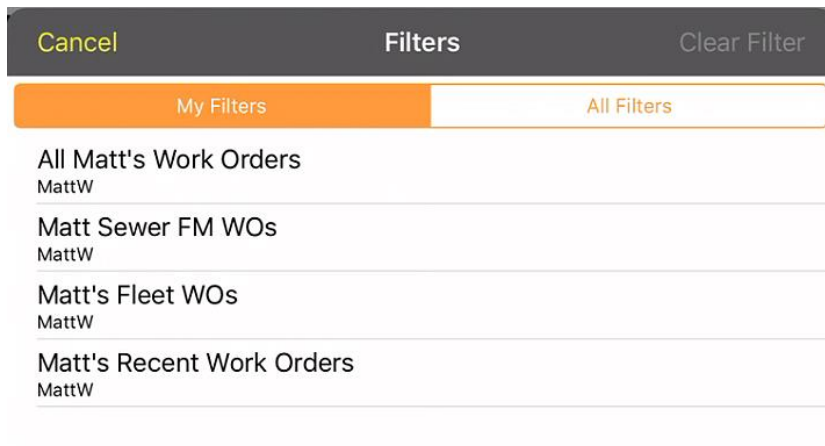
Both the Android and iOS application support loading existing filters created in the web app. To load an existing filter, tap the filter  button. By default the filters displayed will be the currently logged in user's own filters.

Android

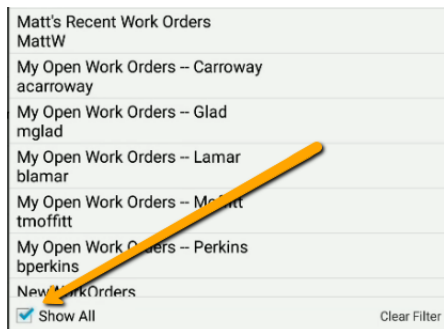


Notes: _____

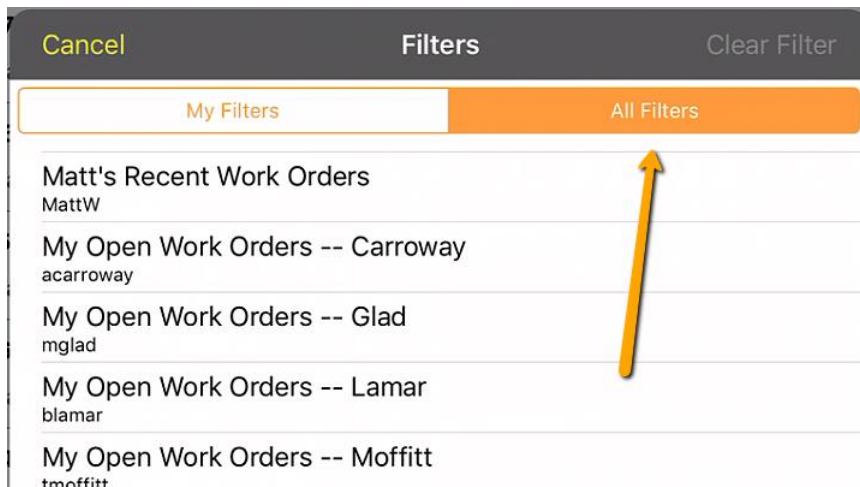
iOS



In Android you can see all filters by tapping the Show All button.



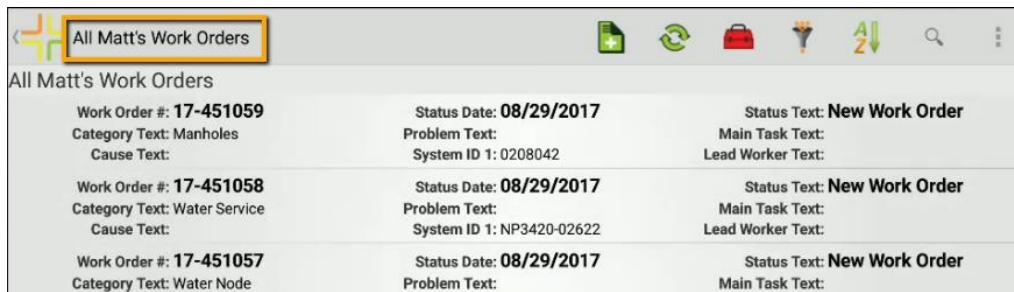
In iOS you can see all filters by tapping the "All filters" tab



Selecting the filter closes the prompt and loads the filter. Paging and record counts work the same as they do for the find functionality.

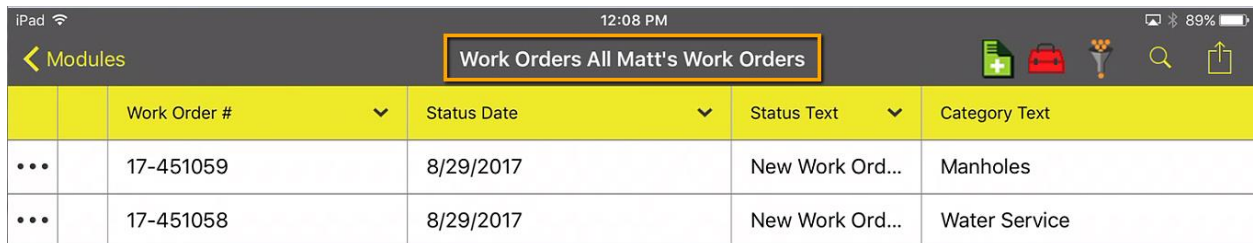
The name of the filter selected will appear in the title bar of the view when there is a filter loaded.

Android



Work Order #	Status Date	Status Text	Category Text	Problem Text	System ID 1
17-451059	08/29/2017	New Work Order	Manholes		0208042
17-451058	08/29/2017	New Work Order	Water Service		NP3420-02622
17-451057	08/29/2017	New Work Order	Water Node		

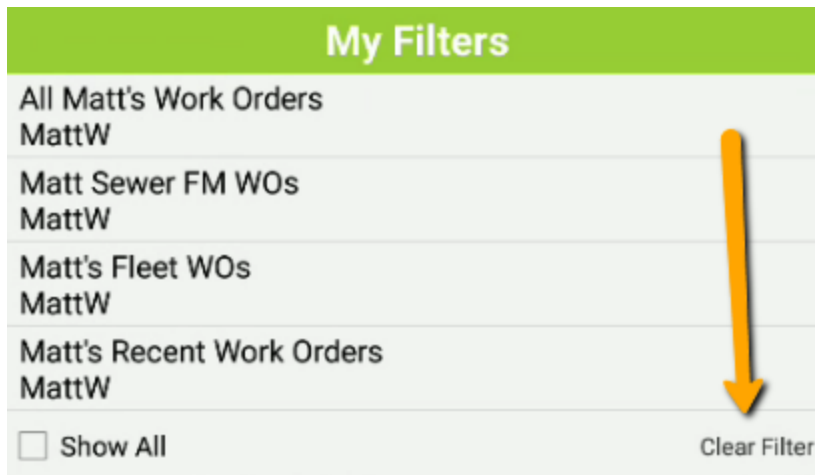
iOS



Work Order #	Status Date	Status Text	Category Text
17-451059	8/29/2017	New Work Ord...	Manholes
17-451058	8/29/2017	New Work Ord...	Water Service

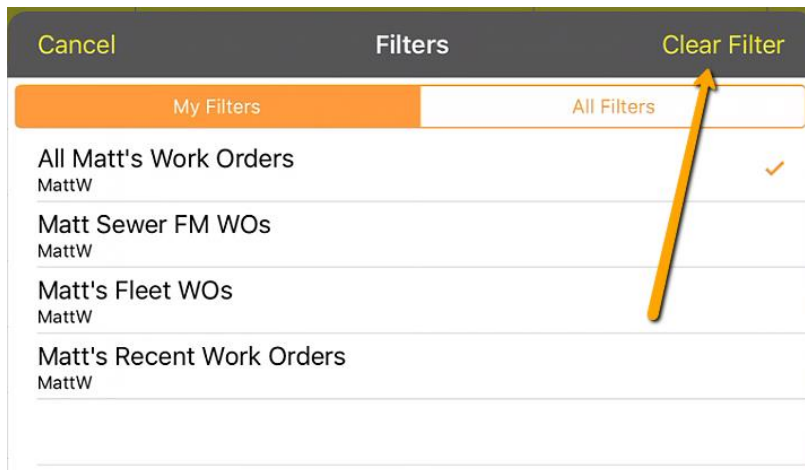
To clear a filter, tap the filter  button again and tap Clear Filter:

Android



My Filters
All Matt's Work Orders MattW
Matt Sewer FM WOs MattW
Matt's Fleet WOs MattW
Matt's Recent Work Orders MattW
<input type="checkbox"/> Show All
Clear Filter

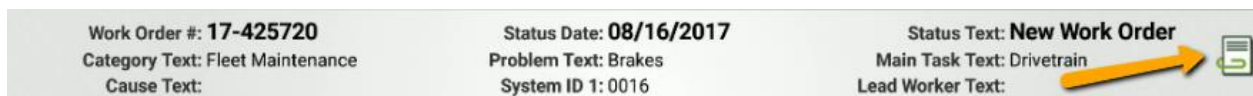
iOS



Viewing attached documents

Records with documents attached will include a documents button. Tap this button to view any documents attached to a record.

Android



iOS



Documents are discussed further later in this manual.

Toolkits

Most toolkits are available in the mobile apps. Some toolkits work on selected records and some toolkits work without a selection. Which toolkits are available will depend on the Lucity server version you have installed.



Android:

Open Work Orders			Available Tools
Work Order #: 17-466647 Category Text: Parks Maintenance Cause Text:	Status Date: 09/06/2017 Problem Text: System ID 1:		Change
Work Order #: 17-466646 Category Text: Parks Maintenance Cause Text:	Status Date: 09/06/2017 Problem Text: System ID 1:		Cancel Work Order
Work Order #: 17-464697 Category Text: Water Main Cause Text:	Status Date: 09/05/2017 Problem Text: System ID 1:		Change Assigned By
Work Order #: 17-451060 Category Text: Call Center Cause Text:	Status Date: 08/29/2017 Problem Text: System ID 1:		Change Crew
Work Order #: 17-451059 Category Text: Manholes Cause Text:	Status Date: 08/29/2017 Problem Text: System ID 1: 0208042		Change Lead Worker
Work Order #: 17-451058 Category Text: Water Service Cause Text:	Status Date: 08/29/2017 Problem Text: System ID 1: NP3420-02622		Change Supervisor
Work Order #: 17-451057 Category Text: Water Node Cause Text:	Status Date: 08/29/2017 Problem Text: System ID 1: HT_1079		Close Work Order
Work Order #: 17-451056 Category Text: Force Mains Cause Text:	Status Date: 08/29/2017 Problem Text: System ID 1: 4321		General
			Calculate Work Order Cost Per Asset
			Create Work Order and Associate to it
			Disassociate from all work orders and requests
			Force Spatial Record Processing
			Request
Count: 779 of 4159			1/52

iOS:

Modules		Work Orders		Category Text
	Work Order #	Cancel	Select Tool	
<input checked="" type="checkbox"/>	17-466646		Change	Parks Maintenance
<input type="checkbox"/>	17-464697		Close Work Order Selected Record(s)	Water Main
<input checked="" type="checkbox"/>	17-451060		Change Supervisor Selected Record(s)	Call Center
<input checked="" type="checkbox"/>	17-451059		Change Lead Worker Selected Record(s)	Manholes
<input type="checkbox"/>	17-451058		Change Crew Selected Record(s)	Water Service
<input type="checkbox"/>	17-451057		Change Assigned By Selected Record(s)	Water Node
<input type="checkbox"/>	17-451056		Cancel Work Order Selected Record(s)	Force Mains
<input type="checkbox"/>	17-451055			Works
<input type="checkbox"/>	17-449106		General	Works
<input type="checkbox"/>	17-449105		Force Spatial Record Processing Selected Record(s)	Water Main
<input type="checkbox"/>	17-449104		Disassociate from all work orders and requests Selected...	Water Main
<input type="checkbox"/>	17-449103		Create Work Order and Associate to it Selected Record	Force Mains
<input type="checkbox"/>	17-447156		Calculate Work Order Cost Per Asset Selected Record(s)	Gravity Mains
<input type="checkbox"/>	17-443257	8/25/2017	Complete	Call Center
Total Records: 4159				
1/278				

The list can also vary based on which records are selected and the permissions of the currently logged in user. This is the same behavior as the Lucity Web application.


Some toolkits may show a list:

For iOS:

< Select Tool Add Multiple Employees Selected Record(s)		
Resource*		
<input type="text"/>		
Code	Type	Department Code
0098	Joya Mc...	USC
0103	Tomeka...	USC
0110	Sam Mc...	USC
0111	Alfred M...	USC

Search is supported in these lists and will find all records that contain the text entered. Select a record and tap OK.

Notes: _____

For Android, lists are shown in a window which overlays the toolkit window. To pick from the list, select the  button.

Add Multiple Employees

Employees

Start Date

Start Time

End Time

Normal Hours

Time Cost

Regular Hours

Overtime Hours

Cancel

Ok

The list of items will overlay the toolkit form. Select an item and click finish.

Add Multiple Employees

0 selected Employees

A Z

Clear

Cancel

Finish


Code: 000001	Description: Ryan Sullivan
Department: 4666	
Code: 119	Description: AGGIE WITOWSKI
Department: 4069	
Code: 148	Description: PETER POTTER
Department: 4101	
Code: 179	Description: HECTOR NICHOLAS
Department: 4137	
Code: 268	Description: DORIS DALAHAY
Department: 4248	
Code: 272	Description: BRIAN ADKINS
Department: 4252	
Code: 54	Description: PATRICK PARKER
Department: 4000	
Code: DEP	Description: Don Pinkston
Department: 4664	
Code: GBA	Description: George Butler
Department: 4663	
Code: MCS	Description: Nicole Schmidt

Cancel

Ok

This will select the item(s) and take you back to the toolkit form to finish entering data.

Add Multiple Employees


Employees 

Start Date Start Time

End Time Normal Hours

Time Cost

Regular Hours Overtime Hours



Cancel Ok


Required toolkit fields are marked with an *. These values must be populated before you will be allowed to execute the tool.

Notes: _____

Selection Mode

There are several tools and functions that are only available or may function differently when records are selected in the grid. In both Android and iOS, records are selected by pressing and holding the record (or one of the records) you are interested in. When you press and hold a record for a moment, you will notice the toolbar changing and the record color changes. In Android it changes to orange, in iOS it changes to a light blue or grey color.

Android



Open Work Orders		
Work Order #: 17-468596 Category Text: Grounds Maintenance Cause Text:	Status Date: 09/07/2017 Problem Text: Pest Control System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-466647 Category Text: Parks Maintenance Cause Text:	Status Date: 09/06/2017 Problem Text: System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-466646	Status Date: 09/06/2017	Status Text: New Work Order


iOS



	Work Order #	Status Date	Status Text	Category Text
<input type="radio"/>	17-468596	9/07/2017	New Work Ord...	Grounds Maintenance
<input checked="" type="radio"/>	17-466647	9/06/2017	New Work Ord...	Parks Maintenance
<input type="radio"/>	17-466646	9/06/2017	New Work Ord...	Parks Maintenance

To leave selection mode, tap the Checkmark in Android or the Cancel in iOS in the title bar of the application.

Android



Open Work Orders		
Work Order #: 17-468596 Category Text: Grounds Maintenance Cause Text:	Status Date: 09/07/2017 Problem Text: Pest Control System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-466647 Category Text: Parks Maintenance Cause Text:	Status Date: 09/06/2017 Problem Text: System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-466646	Status Date: 09/06/2017	Status Text: New Work Order

iOS





	Work Order #	Status Date	Status Text	Category Text
<input type="radio"/>	17-468596	9/07/2017	New Work Ord...	Grounds Maintenance
<input checked="" type="radio"/>	17-466647	9/06/2017	New Work Ord...	Parks Maintenance
<input type="radio"/>	17-466646	9/06/2017	New Work Ord...	Parks Maintenance

Once one record is selected and the application is in selection mode, additional records can be selected by tapping the record. It is not necessary to press and hold to select additional items.

Android

<div>        </div>		
Open Work Orders		
Work Order #: 17-468596 Category Text: Grounds Maintenance Cause Text:	Status Date: 09/07/2017 Problem Text: Pest Control System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-466647 Category Text: Parks Maintenance Cause Text:	Status Date: 09/06/2017 Problem Text: System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-466646 Category Text: Parks Maintenance Cause Text:	Status Date: 09/06/2017 Problem Text: System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-464697 Category Text: Water Main Cause Text:	Status Date: 09/05/2017 Problem Text: System ID 1:	Status Text: New Work Order Main Task Text: Lead Worker Text:
Work Order #: 17-451060 Category Text: Call Center	Status Date: 08/29/2017 Problem Text:	Status Text: Scheduled Main Task Text: Run to Failure

iOS

<div> <div>iPad 1:30 PM 84%</div> <div> <div>< Dashboard</div> <div>Open Work Orders (779)</div> <div>      <div>Cancel</div>  </div> </div> </div>					
	Work Order #	Status Date	Status Text	Category Text	
<input type="radio"/>	17-468596	9/07/2017	New Work Ord...	Grounds Maintenance	
<input checked="" type="radio"/>	17-466647	9/06/2017	New Work Ord...	Parks Maintenance	
<input checked="" type="radio"/>	17-466646	9/06/2017	New Work Ord...	Parks Maintenance	
<input type="radio"/>	17-464697	9/05/2017	New Work Ord...	Water Main	
<input checked="" type="radio"/>	17-451060	8/29/2017	Scheduled	Call Center	
<input type="radio"/>	17-451059	8/29/2017	New Work Ord...	Manholes	

Note: Not all tools work on multiple selected items. Tools which only support a single selected item will prompt the user that the tool cannot be used on multiple items.

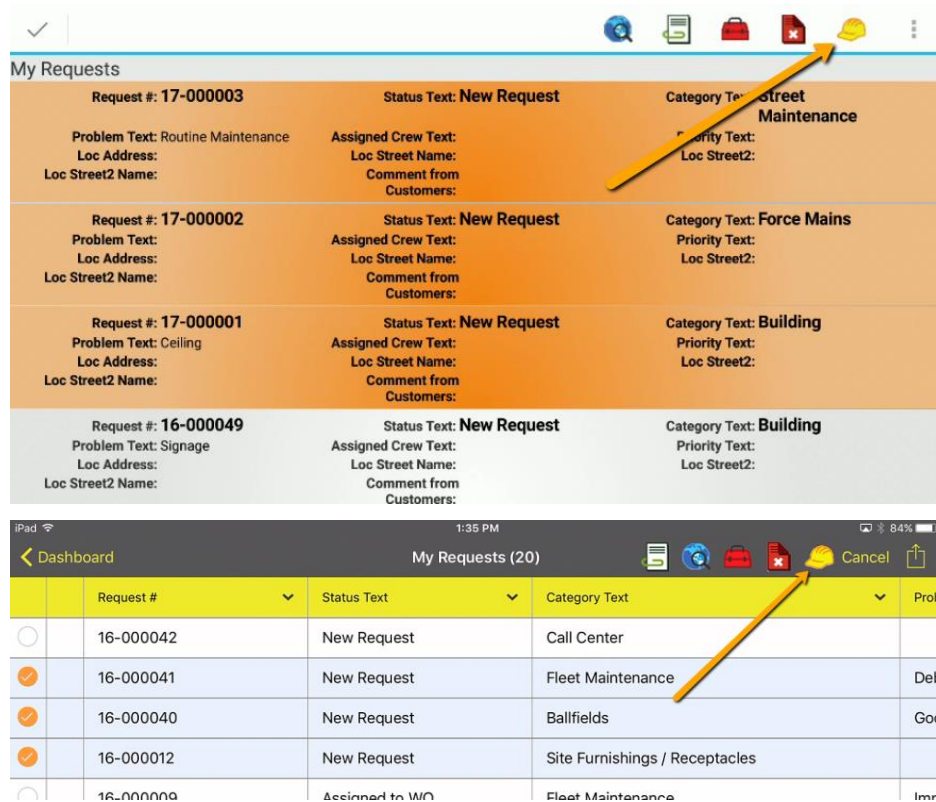
Create Work Order

An additional tool available on requests and some inventory and inspection modules is Create Work Order. This tool is available when one or more records are selected. 🛠️



Tapping on the work order button generates the work order and opens a work order view to display the newly created work order.

To create a work order from multiple requests, select all of the desired requests in the list (you can only choose requests from a single page) and tap the Create Work Order button. This will create one work order and associate all requests to that work order.




Notes: _____

To create a work order from multiple inventory items or inspections, select all of the items and tap Create Work Order. This will create a work order and include all of the selected assets on the work order.

Water Hydrants				
Hydrant Number: 00001	Building No: 3401	Street Name: COLLEGE BLVD	Inspection Date: 08/19/2016	Overall Cond Text: Next Insp Date: 08/19/2018
Hydrant Number: 00002	Building No: 11221	Street Name: ROE AVE	Inspection Date: 03/24/2015	Overall Cond Text: Excellent Next Insp Date: 03/24/2017
Hydrant Number: 00003	Building No: 11208	Street Name: GRANADA LN	Inspection Date: 03/25/2015	Overall Cond Text: Poor Next Insp Date: 03/25/2017
Hydrant Number: 00004	Building No: 4600	Street Name: W 115TH ST	Inspection Date: 03/25/2015	Overall Cond Text: Good Next Insp Date: 03/25/2017
Hydrant Number: 00005	Building No: 10524	Street Name: MOHAWK LN	Inspection Date: 03/19/2015	Overall Cond Text: Fair Next Insp Date: 03/19/2017

Water Hydrants				
	Hydrant Number	Building No	Street Name	Inspection Date
<input type="radio"/>	00001	3401	COLLEGE BLVD	8/19/2016
<input checked="" type="radio"/>	00002	11221	ROE AVE	3/24/2015
<input checked="" type="radio"/>	00003	11208	GRANADA LN	3/25/2015
<input checked="" type="radio"/>	00004	4600	W 115TH ST	3/25/2015
<input type="radio"/>	00005	10524	MOHAWK LN	3/19/2015

Create Request

Creating a request can be done from inventory and inspection modules. Creating a request only works with a single selected item. 



Creating Requests in iOS behaves the same as the Android application. Select the record you want to create a request for and tap the Create Request button. This tool only works on one selected record. When the request is created a view will be opened displaying the created request.

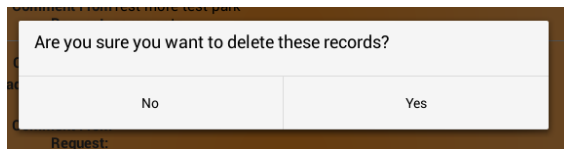
Deleting records on the tablet

Deleting records on the iOS and Android tablets can be done from selection mode as well. Historically more than one record could be deleted at a time. However, the latest versions of the tablet have restricted it to single record deletes. Press and hold a record to enter selection mode (if not already in selection mode)

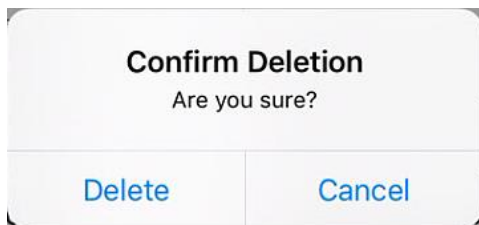
Tap the delete button. 



Android



iOS

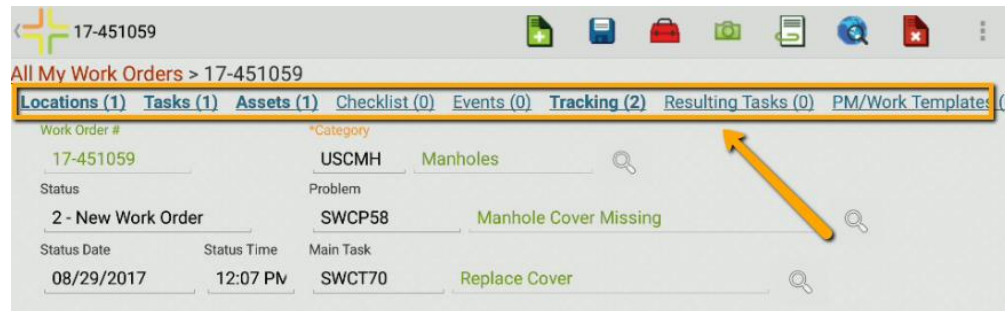


Notes: _____

Navigating child records

Android

In Android, child records are accessed within the form of the parent. Once the parent form is open, the available child views appear across the top of the form with the child view record counts.



iOS

In iOS, child records are accessed with the *** which will display a list of available child views. The *** can be found on the grid or within the form.



Tapping on *** will open a list of available children and their record counts.



Tapping on one of the children will open the grid for that child.

Child views behave very similarly to root level views but do not support filtering and in some cases may not support adding or deleting depending on the child and the user's permissions.

This is the task child grid of work orders:

Android

The Android app interface shows a breadcrumb trail: **All My Work Orders > 17-451059 > Tasks**. Below this, task details are displayed in three columns:

Seq No: 1 Task End Date: Calc'd Unit Cost: 0 Total Cost: 0 Task Supervisor Text: Troy Moffitt	Task Text: Repair Manhole Status Text: # of Units: 0 Unit Cost: 0 Hours: 0	Task Start Date: Unit of Measure Text: Lock Units: false Task Crew Text:
--	---	---

iOS

The iOS app interface shows a breadcrumb trail: **Work Orders - 17-451059 > Tasks**. Below this is a table with the following columns:

	Seq No	Task Text	Task Start Date	Task End Date
...	1	Repair Manhole		

Child views of tasks can be accessed the same way. In Android this is done by selecting the record to open the form and selecting the desired child view.

The Android app interface shows a breadcrumb trail: **All My Work Orders > 17-451059 > Tasks > Current Record**. Below this, a row of child view options is highlighted with a red box: **Employees (0) Materials (0) Fluids (0) Equipment (0) Contractors (0)**. Below this row, the task details for 'SWCT58 Repair Manhole' are shown, along with checkboxes for 'Use Actual Res Cost' and 'Use Est Res Cost', and labor hours columns.

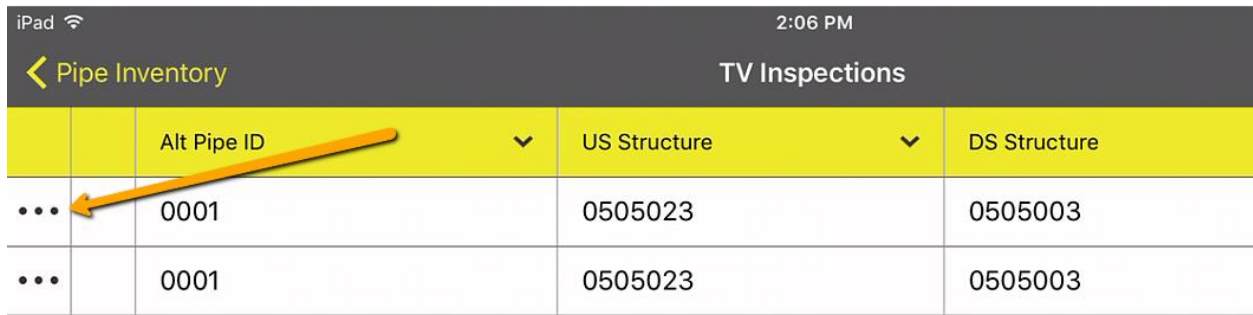
In iOS, child views are accessed with the ... button inline in the row or after opening the form.

Notes: _____

Open in a New View

Both applications support opening root level items in a new view. For example, if you want to open up and view TV inspection observations from the Pipe Inventory module, you can go to the TV inspection you are interested in and open it in a new view. The new view will allow you to view the TV observations.

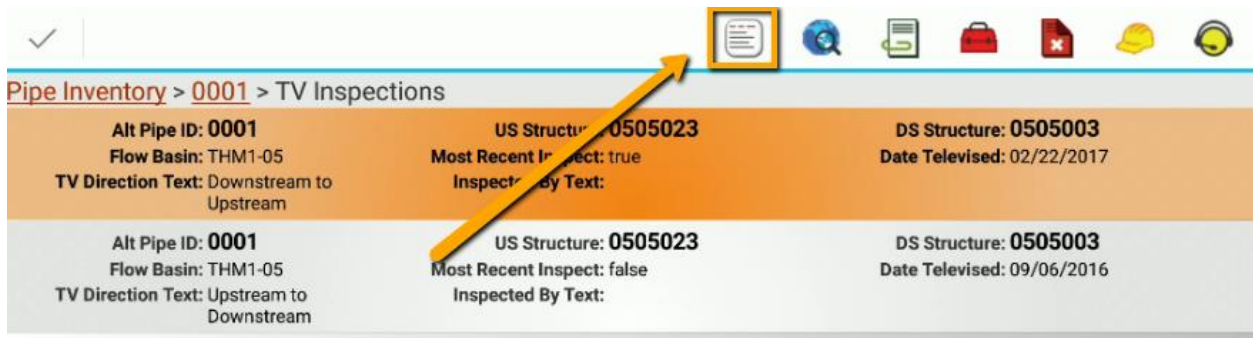
In iOS, you can open in a new view by selecting the “...” button on a root level view item. This will prompt you for whether you want to open the item in a new view:



	Alt Pipe ID	US Structure	DS Structure
...	0001	0505023	0505003
...	0001	0505023	0505003

New View
Would you like to open TV Inspections
in a new view to see more details?

In Android, select the record you are interested in seeing in a new view and select the Open in a New View button:



Pipe Inventory > 0001 > TV Inspections

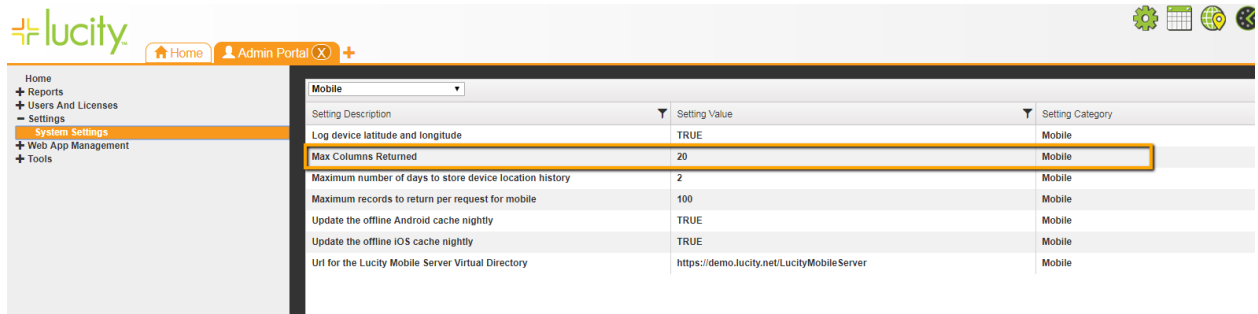
Alt Pipe ID: 0001 Flow Basin: THM1-05 TV Direction Text: Downstream to Upstream	US Structure: 0505023 Most Recent Inspect: true Inspect By Text:	DS Structure: 0505003 Date Televised: 02/22/2017
Alt Pipe ID: 0001 Flow Basin: THM1-05 TV Direction Text: Upstream to Downstream	US Structure: 0505023 Most Recent Inspect: false Inspected By Text:	DS Structure: 0505003 Date Televised: 09/06/2016

Configuring Views for mobile

Views configured for the Lucy Web application will automatically be used by the tablet application. The system will automatically use the same views configured for the users in the mobile application that are used for the user in the web application.

Refer to documentation from a Lucy Administration session for how to customize views and configure views for users.

In system settings you can configure the maximum number of columns shown in mobile for a view.



Setting Description	Setting Value	Setting Category
Log device latitude and longitude	TRUE	Mobile
Max Columns Returned	20	Mobile
Maximum number of days to store device location history	2	Mobile
Maximum records to return per request for mobile	100	Mobile
Update the offline Android cache nightly	TRUE	Mobile
Update the offline iOS cache nightly	TRUE	Mobile
Url for the Lucy Mobile Server Virtual Directory	https://demo.lucity.net/LucityMobileServer	Mobile

Views with more than 20 or 30 columns do not work well in the mobile application. They take too much display memory to render and take up too much space. This limit allows views to be defined for desktop usage with many columns, but still work well in mobile by only showing the first X columns.


How User Permissions Affect Views

The user used for this training has full permissions to all modules. Users without delete permissions will not have a delete button. Users without permissions to add and edit documents may also see slightly altered screens in the documents dialogs.

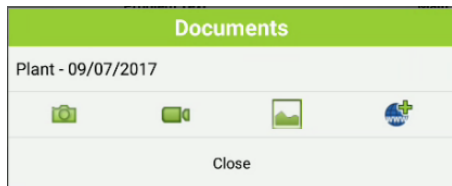
Notes: _____

Documents

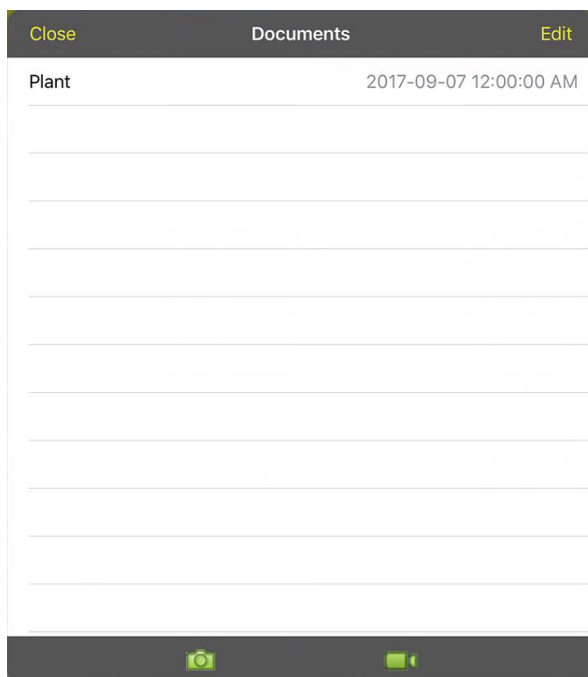
Working with Documents in Views

Documents can be viewed or added while in selection mode or from within a form. Select a record or open the form for the record and tap the Documents  button in the toolbar. This will open up a dialog displaying all existing documents attached to the record.

Android



iOS

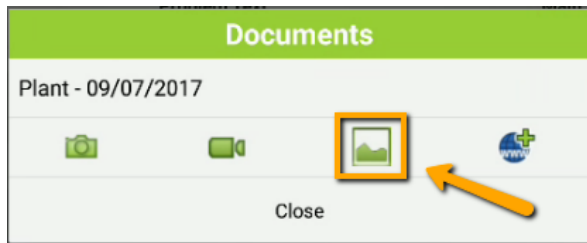


Documents and web links can be opened by tapping on the item in the document list.

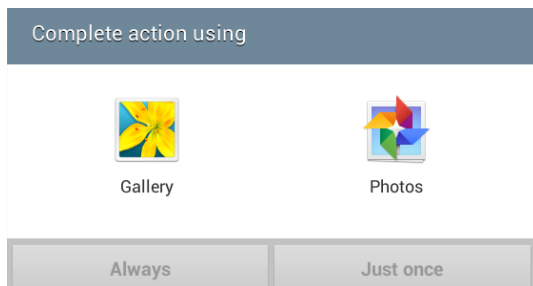
Android supports adding images, videos, or web url attachments. The iOS application supports adding images and videos. Both mobile applications support taking a new picture/video or selecting an existing image/video from the gallery.

Attaching and Adding Images

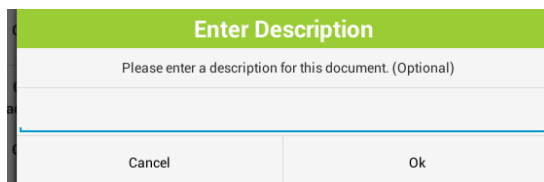
In Android, to attach an image or video from the gallery, tap the gallery button on the documents dialog:



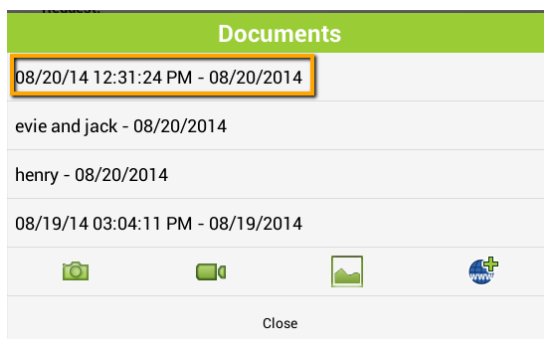
Depending on what apps are installed on the device, you may get prompted for which application to use for the gallery. In the case of this device, there are 2 possible image sources (gallery and photos). Gallery is available on every android device that has a camera installed. Many installations include the photos app as well and depending on what other apps are installed, there may be even more choices in this dialog:



Once you select a photo from the gallery or photos, you will be prompted for a description.

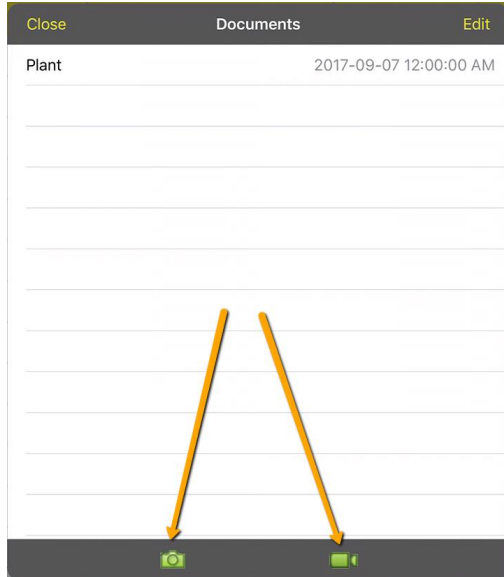


If you do not enter a description, the upload will have a description of the current date and time.



The document is uploaded to the server and is now available to all Lucity systems (web, mobile, desktop).

In iOS, to attach a file, tap on the button for either image  or video .



Choose the option for Photo Library or Video Library:



Find the image or video you want to attach and select it. You will then be prompted for a description:



Tap Save. If you do not enter a description, it will populate the description with the current date and time:

Documents	
Close	Edit
09/07/17 02:58:18 PM	2017-09-07 12:00:00 AM
Plant	2017-09-07 12:00:00 AM

Once you have saved the document, the document is uploaded to the server and is now available to all Lucy systems (web, mobile, desktop).



To take a new image or video, tap either the  or  button. In Android, tapping those buttons takes you directly to the camera. In iOS, you will choose the option for Take Photo or Take Video and that will open the camera:

Image Source
Select Your Image Source

Take Photo

Photo Library

Cancel

Once the picture is taken or the video recorded, you will be prompted whether to discard or save the image. Tapping save will prompt for the optional description.

Enter Description

Please enter a description for this document. (Optional)


Cancel Ok

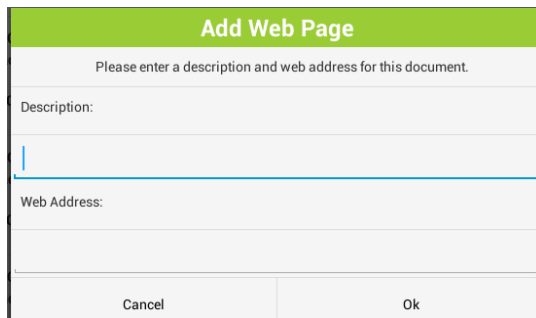
< Documents Save

DESCRIPTION

Optional

Once you have entered a description (if you choose to do so), tap Ok or Save on the description to upload it to the server. Images captured directly are not saved to the device; they are uploaded directly to the server.

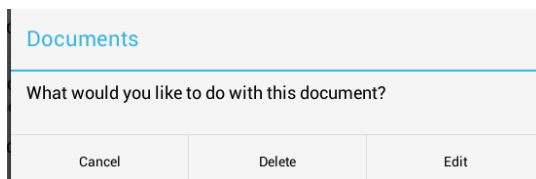
In Android you can also attach web urls to documents. Tap the  button to open a dialog to add a url to a document.



The 'Add Web Page' dialog has a green header. Below it is a prompt: 'Please enter a description and web address for this document.' There are two text input fields: 'Description:' and 'Web Address:'. At the bottom are 'Cancel' and 'Ok' buttons.

Editing and Deleting Documents

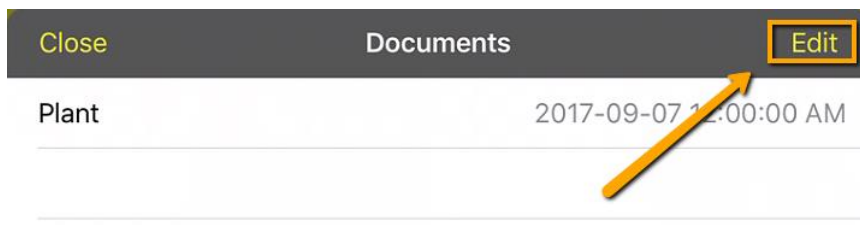
In Android, to edit or delete a document, press and hold the document in the document list. This will prompt:





The 'Documents' dialog has a title bar with 'Documents' in blue. Below it is a prompt: 'What would you like to do with this document?'. At the bottom are 'Cancel', 'Delete', and 'Edit' buttons.

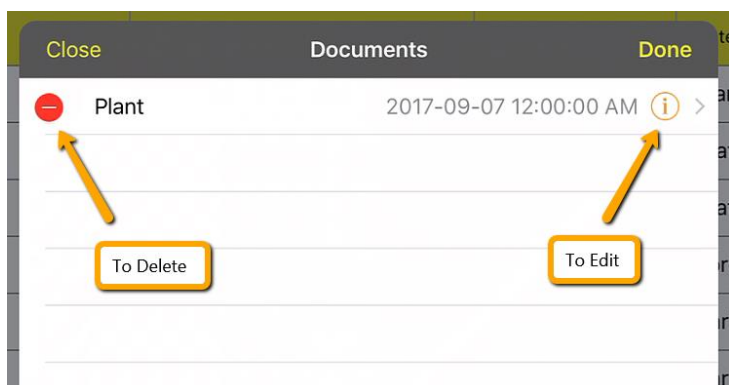
Editing allows you to edit the document description. Delete will delete the document from the record and from the Document Server.

In iOS, to edit or delete a document, tap the Edit button in the Documents dialog:



The iOS 'Documents' dialog has a dark header with 'Close' on the left, 'Documents' in the center, and an 'Edit' button on the right. Below the header is a list of documents. The first document is 'Plant' with a timestamp '2017-09-07 12:00:00 AM'. An orange arrow points to the 'Edit' button.

The dialog then changes and you can tap the  to edit the Description or the  to Delete the document.



The iOS 'Documents' dialog now has a dark header with 'Close' on the left, 'Documents' in the center, and 'Done' on the right. Below the header is a list of documents. The first document is 'Plant' with a timestamp '2017-09-07 12:00:00 AM'. To the left of the document name is a red minus icon, and to the right is an info icon. An orange arrow points to the red minus icon, and another orange arrow points to the info icon. Below the list are two buttons: 'To Delete' and 'To Edit'.

Forms Introduction

Views and child views and grandchild views (etc) may each have attached forms. These forms are accessible in the tablet application by tapping on a record in a view. Tapping on a record will open the form in both iOS and Android to allow for editing and viewing information on the form. Additionally, new records can be added in the tablet with the Add button which opens up a blank form (pre-populated with defaults).

Prior to going into detail on forms, it is helpful to review methods of navigating in the tablet application between views, forms, the dashboard, etc.

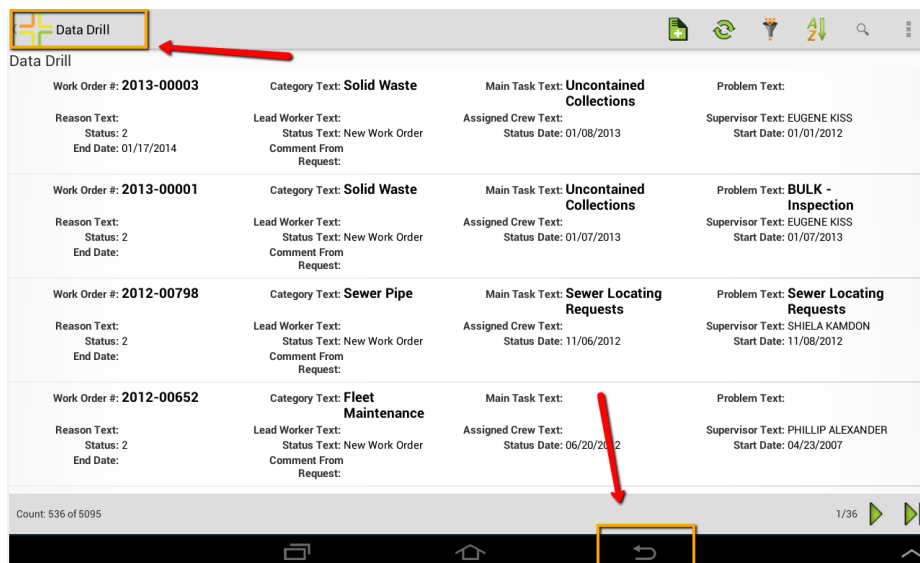
Navigation

Navigation in Android

In Android, navigation options are available in the menus, as well as in cookie trails, and by using the Android system back button (on the device or on the display).

From the dashboard, there are buttons to get to GIS, a menu option to open the modules menu, and many links within the dashboard frames themselves to open up an alternate area in the Lucy Mobile application.

Once in a view from the dashboard frame link, navigate back to the dashboard by tapping the Lucy dashboard navigation button on the upper left. This will take the user back to the dashboard to the frame the user was on when launching the view. Alternately the system back button will also return the application to the dashboard. The location of the system back button can vary slightly between devices.



Views opened from the modules menu also support navigating back to the dashboard in the same way.

<div>Work Orders</div>			
Work Order #: 2014-00879 Reason Text: Status: 2 End Date:	Category Text: Call Center Lead Worker Text: Status Text: New Work Order Comment From Request:	Main Task Text: Assigned Crew Text: Status Date: 08/18/2014	Problem Text: Matt Problem Supervisor Text: Start Date:
Work Order #: 2014-00878 Reason Text: Status: 2 End Date: 08/20/2014	Category Text: Sewer Manhole Lead Worker Text: Status Text: New Work Order Comment From Request:	Main Task Text: Assigned Crew Text: Status Date: 08/12/2014	Problem Text: Info - Wastewater Supervisor Text: SHANE HARPO Start Date: 08/20/2014
Work Order #: 2014-00877 Reason Text: Status: 2 End Date:	Category Text: Admin Lead Worker Text: Status Text: New Work Order Comment From Request:	Main Task Text: Assigned Crew Text: Status Date: 08/12/2014	Problem Text: Supervisor Text: Start Date:
Work Order #: 2014-00876 Reason Text: Status: 2 End Date:	Category Text: Sewer Manhole Lead Worker Text: Status Text: New Work Order Comment From Request:	Main Task Text: Assigned Crew Text: Status Date: 08/11/2014	Problem Text: Info - Wastewater Supervisor Text: SHANE HARPO Start Date:
Work Order #: 2014-00875 Reason Text: Status: 2	Category Text: Storm Pumps Lead Worker Text: Status Text: New Work Order	Main Task Text: Assigned Crew Text: Status Date: 08/11/2014	Problem Text: UTILITY LOCATIONS Supervisor Text: Start Date:
Count: 5095 of 5095		1/340	

In most cases, the system back button will also close and cancel any open prompts like the documents list, or the filter list and is an alternative to tapping cancel or close.

When adding a new record from a view, the system will display a defaulted empty form. From the add form, the upper left navigation button will cancel the add and take the user back to the dashboard. The system back button will cancel the add and return to the view. Both of these will prompt if there are unsaved changes.

Add - Work Orders

Returns to the dashboard

Work Orders > Add - Work Orders

Work Order #

Status

Status Date

08/20/2014

Status Time

6:25 PM

Comment From Request

Enter your comment here

Cause

Assigned By

Assigned Crew

Supervisor

*Category

*Problem

Main Task

*Assigned Date

Assigned Time

Start Date

Start Time

Document Available

Returns to the view

Additionally, a cookie trail is provided on forms to facilitate faster or more direct navigation. In the case of a new work order, it provides a link to go back to the work order view.

In more nested or complex navigation scenarios, it provides access all the way up the object tree for rapid access to parent or grandparent data. From this employee record, links are provided to look at the employees child view, the CSINFO10 task form, the work order task view, the work order form, or the work orders view.

In the above highly nested object, the Lucy navigation button in the upper left corner still returns the application to the dashboard.

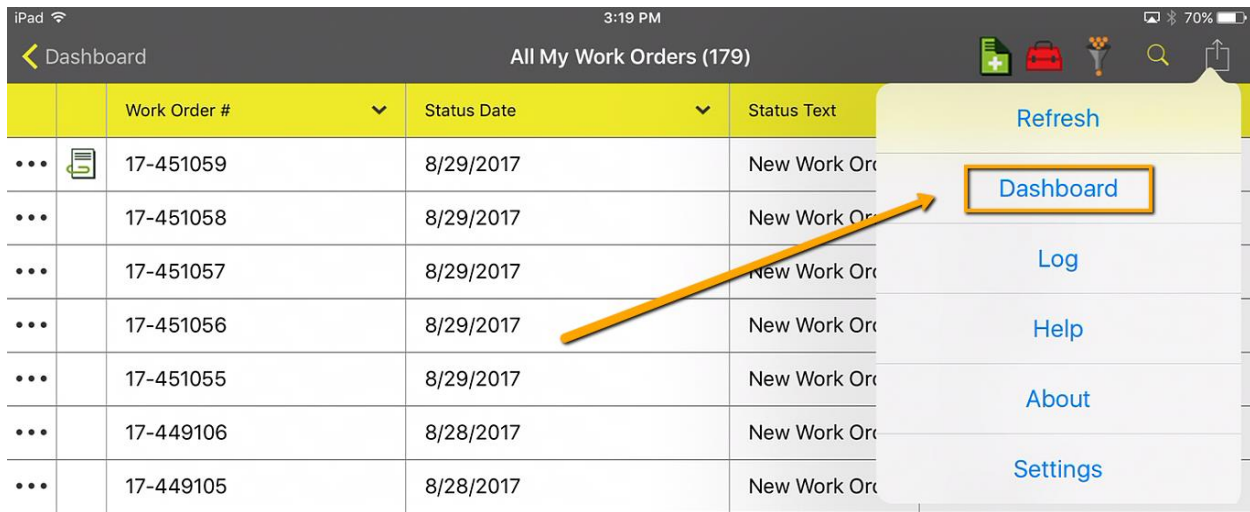
Navigation in iOS

The navigation in iOS is similar, but there is no system back button. Additionally, there is not a go to dashboard Lucy icon in the upper left hand corner. However, most screens in the iOS application provide a menu option to allow a user to easily jump back to the dashboard.

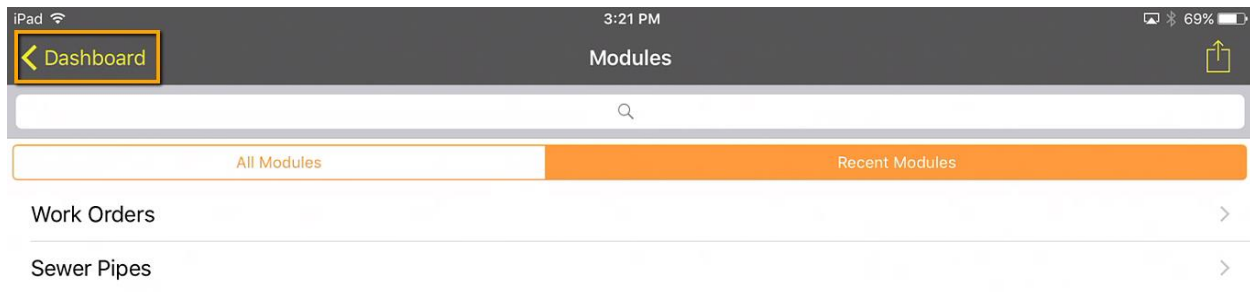
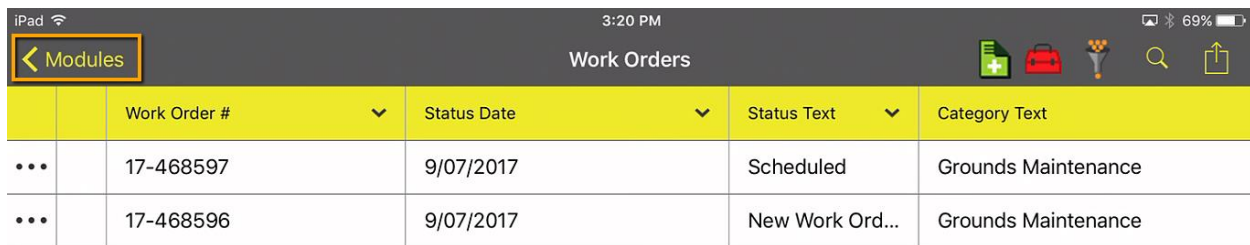
From the dashboard, views can be launched from dashboard items such as asset trees or data drills. When launched from an asset tree or data drill, the upper left navigation returns to the dashboard.

	Work Order #	Status Date	Status Text	Category Text
...	17-451059	8/29/2017	New Work Ord...	Manholes
...	17-451058	8/29/2017	New Work Ord...	Water Service

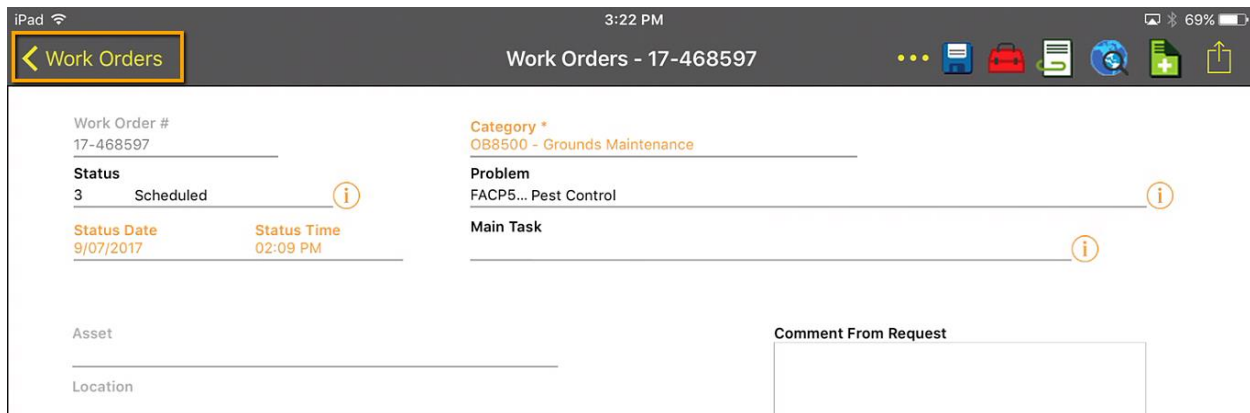
Additionally, all views have a “Dashboard” option in the menu.



When a view is opened from the modules menu, the upper left navigation returns to the modules menu. Then from the modules menu, the upper left navigation returns to the dashboard



When in a form, the upper left navigation returns to the parent view.



Additionally, in iOS you can page through individual records while on a form. Instead of navigating back to the parent view to select a new record, you can use a two finger swipe from right to left to move forward records (and a two finger swipe from right to left to move back).

All forms also include the Dashboard link in the menu.

Work Orders - 17-468597

Work Order #
17-468597

Status
3 Scheduled

Status Date
9/07/2017

Status Time
02:09 PM

Category *
OB8500 - Grounds Maintenance

Problem
FACP5... Pest Control

Main Task

Asset

Location

Comment From

Save And Close

Dashboard

Reports

Log

Help

When in a child view, the navigation button returns to whatever the previous screen was. If the child view was opened from a parent view it will open the parent view.

	Sequence	Category Text	System ID 1
...	1	Manholes	0208042

If the child view was opened from a parent form, it will open the parent form.


	Sequence	Category Text	System ID 1
...	1	Manholes	0208042

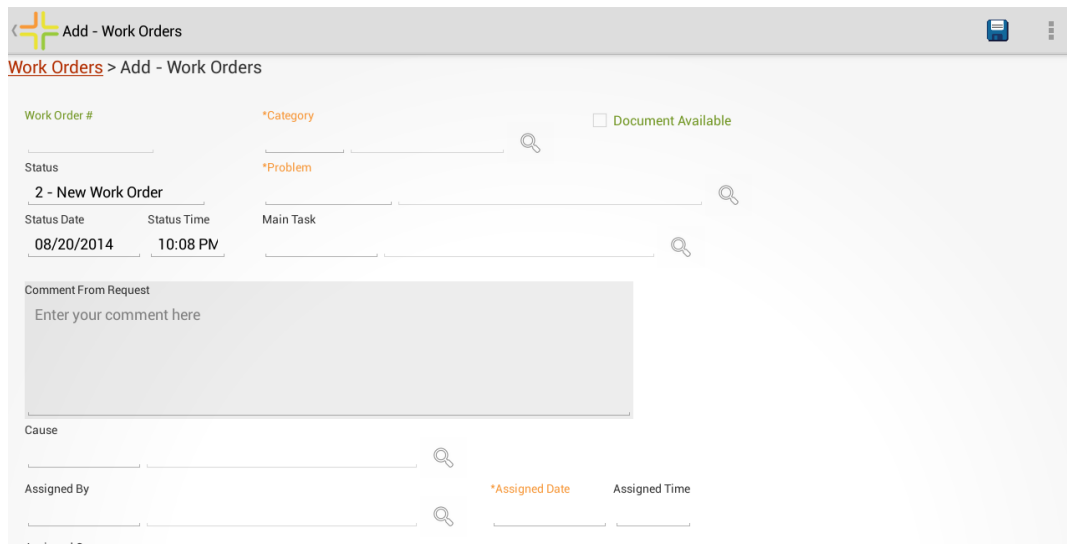
Notes: _____

Forms in Detail

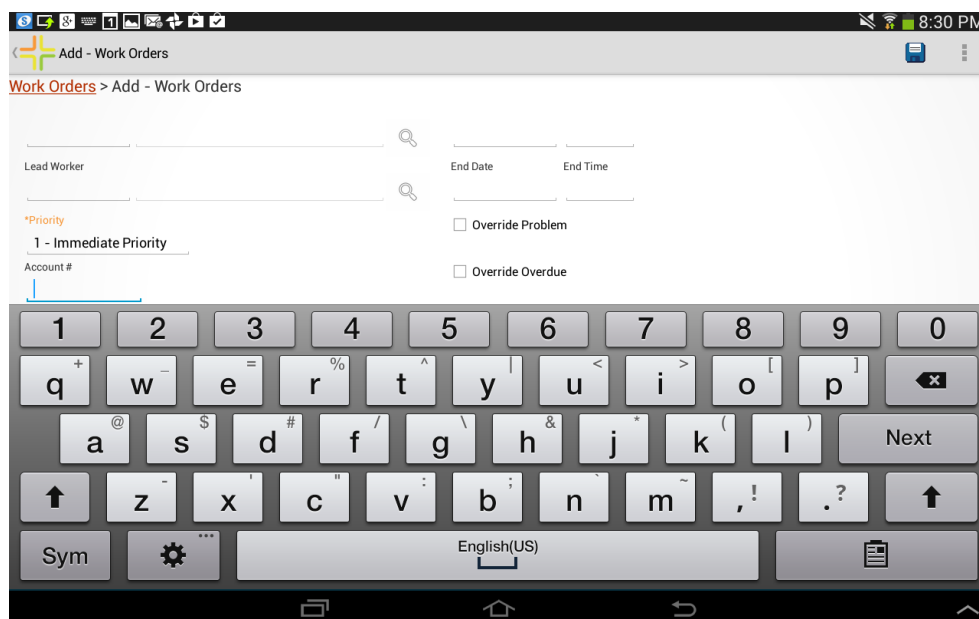
In the mobile applications forms are often accessed from views. A form can also be accessed from the Menu.

Adding Records

Views that support “Add” will include a  button on the view or within the form. This will launch a form with any default values already populated. For example, on work orders the status will be defaulted to 2 - New Work Order. Any system defaults that are configured or form level defaults will also be populated on the form.




In Android, read only fields are labeled in green and required fields are labeled in orange. Most fields support manually typing into the field if desired. Tap into the field area. This will bring up a keyboard to start typing.



Fields which only support picking values from a picklist (like simple code/type fields) will pop up a picklist when the field is tapped.

Date fields pull up a calendar to pick a date. Time fields pull up a time picker. These date/time pickers vary by device. Here are some examples:

Some fields support picking values from a list and manually typing data into the field. These fields have a search button .




Tap on this search button to pick a value from a list.

Problem	
<input type="text"/>	Sort By <input checked="" type="radio"/> Code <input type="radio"/> Type
<input type="checkbox"/> Show All	
FACP000 - Routine Maintenance	
FACP200 - Ceiling	
FACP220 - Door / Lock	
FACP260 - Floor	
FACP340 - Key Request	
FACP420 - Moving & Storage	
FACP580 - Signage	
FACP720 - Wall	
FACP740 - Window	

Some picklist fields have multiple fields, such as the work order asset child asset rec # picklist:

Asset Rec #			
 <input type="text"/>		1/14  	
ID: 608 VIN: 1GCEC14W21Z259491	NUMBER: BGB0532	DESCRIPTION: 2001 CHEVROLET 1500	
ID: 609 VIN: 1GCEC14V92Z217361	NUMBER: BGB0600	DESCRIPTION: 2002 CHEVROLET 1500	
ID: 610 VIN: 1GCEC14W3WZ194996	NUMBER: BGS0382	DESCRIPTION: 1998 CHEVROLET 1500	
ID: 611 VIN: 1GCEC14W7WZ194905	NUMBER: BGS0383	DESCRIPTION: 1998 CHEVROLET 1500	
ID: 612	NUMBER: BGS0385	DESCRIPTION: 1998 CHEVROLET 1500	



Another example of a picklist with multiple fields is the hydrant lookup on a hydrant inspection form. (Sometimes these are referred to as value lookups in Lucy)

Hydrant Number		
 <input type="text"/>		1/5  
Hydrant Number: 1203 Inlet Size: 6 Str Post Bldg No: Str Type: ST	Type: Dry-Barrel Hyd Valve Size: 26.64 Direction: S Suffix:	Status: Fair Building No: 2643 Street Name: ASH Hydrant Rec #: 30
Hydrant Number: 1204 Inlet Size: 6 Str Post Bldg No: Str Type: DR	Type: Dry-Barrel Hyd Valve Size: 3 Direction: S Suffix:	Status: Good Building No: 2754 Street Name: BALBOA Hydrant Rec #: 31
Hydrant Number: 1205 Inlet Size: 6	Type: Dry-Barrel Hyd Valve Size: 2.64	Status: Good Building No: 2634

Searching for data in these picklists can make it easier to find the record you are looking for.

Hydrant Number	
	
Hydrant Number: 1203	Type: Dry-Barrel
Inlet Size: 6	Hyd Valve Size: 26.64
Str Post Bldg No:	Direction: S
Str Type: ST	Suffix:
Hydrant Number: 1204	Type: Dry-Barrel
Inlet Size: 6	Hyd Valve Size: 3
Str Post Bldg No:	Direction: S
Str Type: DR	Suffix:
Hydrant Number: 1205	Type: Dry-Barrel
Inlet Size: 6	Hyd Valve Size: 2.64

To search, tap the search button and type a full or partial search term.

Hydrant Number	
 bal 	
Hydrant Number: 1204	Type: Dry-Barrel
Inlet Size: 6	Hyd Valve Size: 3
Str Post Bldg No:	Direction: S
Str Type: DR	Suffix:

The search will look for any columns which include that text. Searches in the work order asset picklist work on limited columns (they do not work on description). Searches in other picklists will search all visible fields that contain the text such as the hydrant picklist shown above.

Street list is another large picklist where searching may be helpful to quickly find the desired street. For example, the Street Name field in the Work Order Location child

Street Name	
 she 	
SHEFFIELD AVE	
SHEFFIELD CT	
SHEFFIELD RD	
SHERRI CT	
SHERRI DR	

The application gets intermittent updates from the server when users tap in a new field or fill out values in certain fields. For example, when the problem is selected, main task will be filled in. This is done with continual communication with the server, but none of the edits made on the tablet are persisted until the Save button is tapped.

Tap the Save button to save changes. This will save the changes to the database and will update the form to show available child items which can be added

2014-00881

Work Orders > 2014-00881

Locations (0) Assets (0) WO Checklist (0) Work Order Events (0) Tasks (0) **Work Order Tracking (1)** Comments (0)

Work Order # 2014-00881

*Category 01000 Admin

Status 2 - New Work Order

*Problem BSRES Blue Stake Inquiry - Residential

Main Task BSRES Blue Stake Inquiry from a Resident

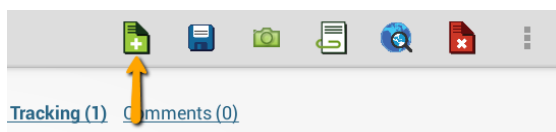
Status Date 08/20/2014 Status Time 10:08 PM

Document Available

New tools available after save

Child records can now be added

Additional records can be added directly from the form if multiple records need to be created. This is faster than navigating back to the view to add a new record.



Adding Child Records

To add a child record, tap on the desired child in the cookie trail:

2014-00881

Work Orders > 2014-00881

Locations (0) Assets (0) WO Checklist (0) Work Order Events (0) **Tasks (0)** Work Order Tracking (1) Comments (0)

Work Order # 2014-00881

*Category 01000 Admin

Status 2 - New Work Order

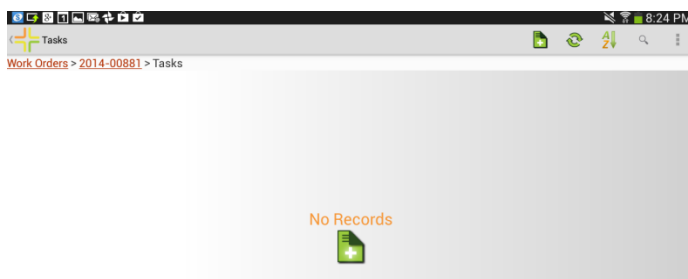
*Problem BSRES Blue Stake Inquiry - Residential



Main Task BSRES Blue Stake Inquiry from a Resident

Status Date Status Time

Document Available

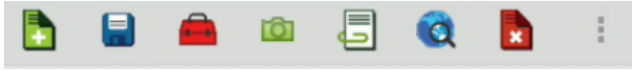
This will open a view with 0 or more records. If there are 0 records, it will look like this:



Records can be added by tapping on the  in the middle of the form or the  on the toolbar:

Tools available on forms

Once a record is saved, additional tools are available on a form:



Show in Map is available for the record



Documents can be viewed and edited (the workflow for the forms document control and views document control is the same, see details earlier in this guide).



The document tool works the same, but an additional button for capturing a new image is available to allow users to rapidly attach a new photo to a record. Tap the button and proceed with photo capture.



Records can also be deleted directly from a form



Toolkits are available and run as on a selected record



Using Forms in iOS

Forms in iOS provide the same basic functionality as Android forms. Adding a record will automatically default values based on Lucity business rules, defined global defaults, as well as form level defaults. For example, the work order status is automatically defaulted.

Fields on the form which are read only are greyed out. Fields on the form that are required are marked with an asterisk. Fields which support manually entering text are black, and fields which may only be populated by picking a value are orange.

iPad 4:18 PM 65%

< Work Orders Work Orders - 17-468597

Work Order # 17-468597

Status 3 Scheduled

Status Date 9/07/2017 Status Time 02:09 PM

Category * OB8500 - Grounds Maintenance

Problem FACP5... Pest Control

Main Task

Asset

Location

Cause PRK50... Pest Control

Assigned Crew

Supervisor * 0109 Dave Dreiwitz

Lead Worker

Priority 1 Immediate (few hours)

Account #

Proj No - Acct

Project Text

Reason

Comment From Request

Assigned By

Assigned Date Assigned Time

Start Date Start Time

End Date End Time

Overrides

- ☐ Problem
- ☐ Overdue
- ☐ Leadworker
- ☐ Task
- ☐ Supervisor
- ☐ Hard Lock WO

These forms support a pinch zoom feature allowing a user to zoom in and out of a form in iOS. This is particularly helpful when dealing with forms on an iPhone.

The category field in iOS can only be picked from the tree. It does not support manual typing:

Category *	Cancel
Call Center	
Facilities	(i) >
Fleet Maintenance	
Matt	
Parks Maintenance	(i) >
Sewer Collections	(i) >
Storm Water	(i) >
Street Maintenance	(i) >

To drill into category child items in the category tree tap the (i) button.

Category items with child items will have the (i) button.

< Category *	Sewer Collections	Cancel
Force Mains		
Gravity Mains		
Manholes		
Service Lateral Gravity		
Service Lateral Pressure		
Sewer Pumping	(i) >	

To navigate back up the tree use the navigation in the upper left corner of the category picklist dialog.

< Sewer Collections	Sewer Pumping
Pump Stations	
Sewer Pumps	

Work flow setup picklist items other than Category support manually entering data or picking the value from a list. To select a value from a list, tap the ⓘ . This list will only show values that are associated to the category already selected.

The screenshot shows a mobile application interface for a 'Problem' picklist. At the top, there is a header bar with 'Show All (Off)' on the left, 'Problem' in the center, and 'Cancel' on the right. Below the header is a search bar with a magnifying glass icon. Underneath the search bar are two tabs: 'Code' (highlighted in orange) and 'Type'. The main area displays a list of items: CCINFOMSC - Info - Miscellaneous, CCINFOPRT - Info - Block Party, FACP000 - Routine Maintenance, FACP240 - Flagpole, FACP360 - Landscaping, FACP440 - Mowing, FACP540 - Pest Control, and FACP560 - Sign Maintenance.

These picklists support searching which can be helpful in very long lists such as material lists. Searches use contains and will find all items which have the text entered anywhere in the code or text portion of the code/type combination.

This screenshot shows the same 'Problem' picklist interface, but with a search filter applied. The search bar now contains the text 'Pest'. The list of items is filtered to show only 'FACP540 - Pest Control'. The 'Show All (Off)' button and the 'Cancel' button remain visible at the top.

Date and time fields display a date or time picker. This opens when the field is tapped.

Two side-by-side screenshots of mobile application pickers. The left screenshot shows a 'Date' picker with a header bar containing 'Assigned Date', 'Cancel', 'Clear', and 'Done'. The picker displays a grid of months (June to December), days (1 to 10), and years (2014 to 2020). The right screenshot shows a 'Time' picker with a header bar containing 'Assigned Time', 'Cancel', 'Clear', and 'Done'. The picker displays a grid of hours (1 to 7), minutes (22 to 28), and AM/PM indicators.

Comment fields support multiple lines and carriage returns. The standard keyboard includes a “return” key for inserting carriage returns.

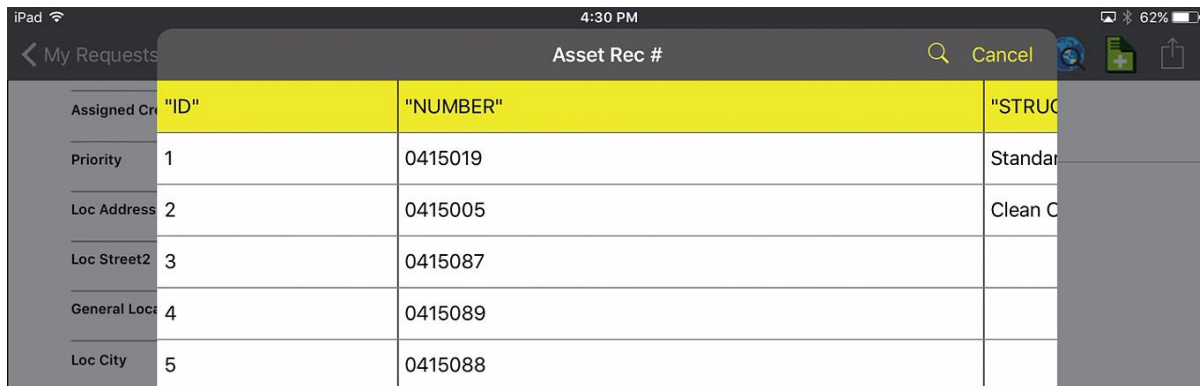
The screenshot shows an iPad interface for 'Work Orders - 17-468597'. On the left, there is a list of fields: Department (Facilities), Division, Sub-Division, Area, Sub-Area, Owner, and Location. Each field has an information icon (i) to its right. To the right of these fields is a large text area labeled 'Comment to Crew' containing the text 'This is for comments' and 'And supports carriage returns.' Below the form, a standard iPad keyboard is visible, featuring a 'return' key on the second row.

The street list control supports both manually typing a street as well as choosing one.

The screenshot shows a dialog box titled 'Req Street Name' with a 'Cancel' button in the top right corner. Below the title bar is a search bar with a magnifying glass icon. Underneath the search bar is a list of street names: ABERDEEN ST, ALHAMBRA ST, ANTIOCH RD, ASH DR, ASH ST, and BALLENTINE DR.

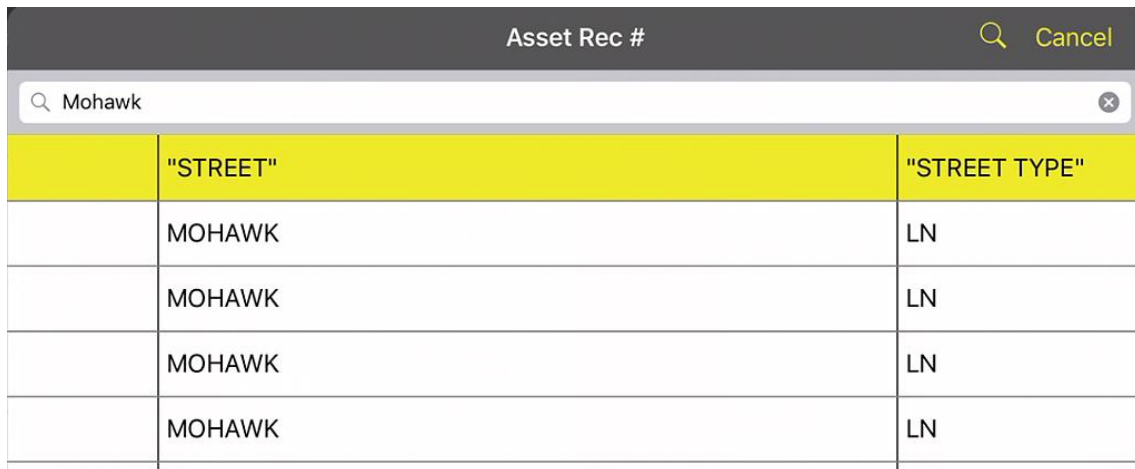
To search in the street list, enter a partial text. The control will search while typing.

The Asset Rec # in work order asset also supports manually typing or choosing from a picklist.



	"ID"	"NUMBER"	"STRUCTURE"
Assigned Cr	1	0415019	Standard
Priority	2	0415005	Clean C
Loc Address	3	0415087	
Loc Street2	4	0415089	
General Loc	5	0415088	

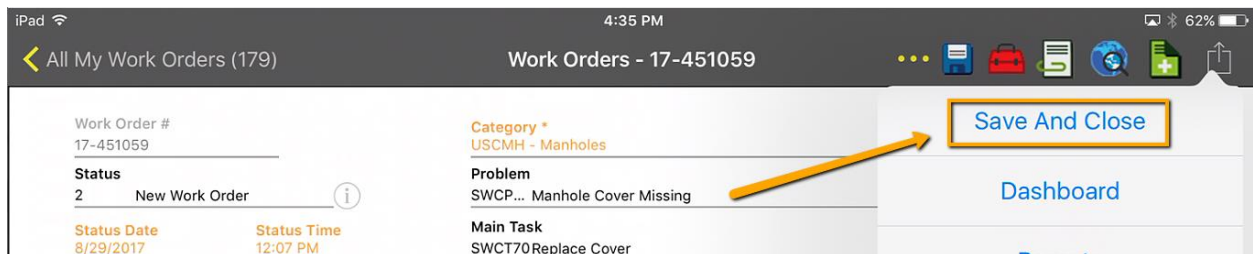
This picklist scrolls left/right and up/down and supports paging. To search in the work order asset list, tap the search button and type in the search prompt and tap the Search button on the keyboard.



	"STREET"	"STREET TYPE"
	MOHAWK	LN
	MOHAWK	LN
	MOHAWK	LN
	MOHAWK	LN

Other lookups such as the hydrant lookup on the hydrant inspections form behaves the same way.

Once all of the data is filled in, tap the savebutton to persist the data to the server. To save and close a form and return to the parent view, press and hold the save button to save and close the form. There is also a menu option to save and close the record.



Work Order # 17-451059

Status 2 New Work Order

Status Date 8/29/2017 Status Time 12:07 PM

Category * USCMH - Manholes

Problem SWCP... Manhole Cover Missing

Main Task SWCT70Replace Cover

Save And Close

Dashboard

Adding Child Records and Available Tools in iOS

Once the data is saved, all the buttons on the toolbar may be used.



Note: Delete is not supported from forms in iOS; delete is only supported in the views.

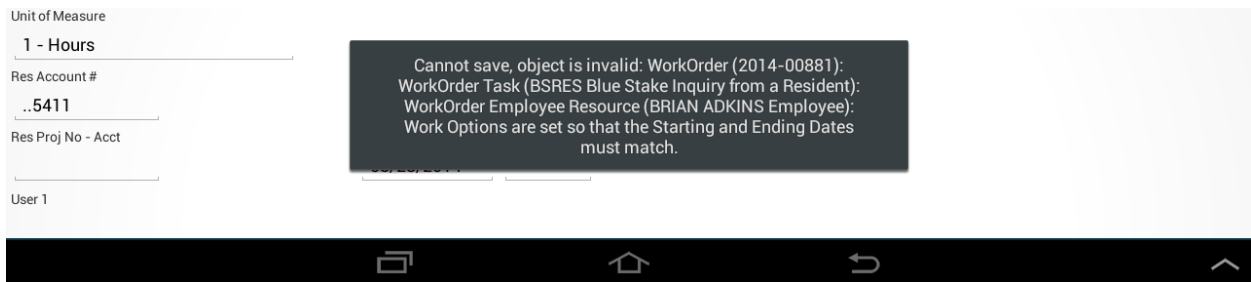
To continue adding child information, after saving the record, tap the Child Views tool and select a child from the list. Continue adding information until all desired information is entered. Data is saved to the server immediately upon tapping save on each form. It is not possible to leave a form without either canceling and discarding changes or saving them.

This varies from Android slightly. Android will, in some cases (such as edits to existing records) allow navigating away from a record (to add child records for example) without saving the parent. Before leaving the object tree Android will prompt about unsaved changes.

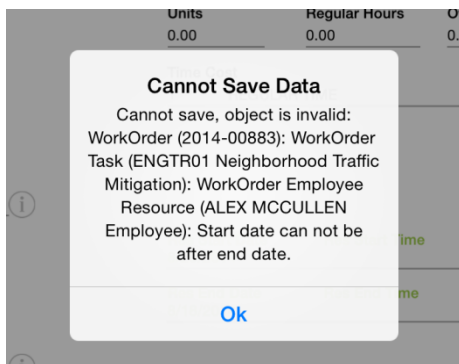
Errors Displayed on Save

Both Android and iOS will display messages when a user tries to save a record with invalid data.

In Android these appear as toast messages:



In iOS they are prompts



In both cases the record is not saved. The user must correct the problem and try the save again.

Warning Prompts

In addition to errors, the iOS application supports warning prompts. Warning prompts will display after tapping the save button. If there is more than one warning, they will be displayed one at a time with a Next button.



Once the full series of warnings is reviewed, an Ok button will be available. Tapping Ok will finish the save.

The Android application will display a toast message with any warnings which will automatically fade away after displaying for a few seconds.

Notes: _____

Parts Inventory Prompts

Both Android and iOS support parts inventory prompting when required. The parts prompt is displayed when a record is saved.

For this example, part Test Part is in parts inventory. Entering 5 units and tapping save prompts for which location to take the parts from:

Cancel

Please select which location to take the 5 Test Part parts from

1989-1.2 1989-1 Qty Avail: 1	
1989-1.1 1989-1 Qty Avail: 2	
UTWD-2 UTWD Qty Avail: 33	
UTWD-1 UTWD Qty Avail: 47	

The mobile application does not support designating multiple part locations for a single save. Tapping on a location will select it.

Cancel Done

Please select which location to take the 5 Test Part parts from

1989-1.2 1989-1 Qty Avail: 1	
1989-1.1 1989-1 Qty Avail: 2	
UTWD-2 UTWD Qty Avail: 33	✓
UTWD-1 UTWD Qty Avail: 47	

Tapping **Done** will save the record and return you to the form.

Android works in an almost identical manner except that selecting a location from the parts prompt will immediately save and return to the saved data form. It is not necessary to tap done.

Information Needed
Please select which location to take the 5 Test Part parts from
1989-1.2 1989-1 Qty Avail: 1
1989-1.1 1989-1 Qty Avail: 2
UTWD-2 UTWD Qty Avail: 33
UTWD-1 UTWD Qty Avail: 47
Cancel

Tapping cancel will cancel the save and return to the unsaved form.

Configuring Forms

Most forms configured for use in the web will be effective in mobile without modification. Frames are not displayed in mobile.

It may be a good idea to review the number of fields on forms that will be used heavily in the field. If fields are not used and are only on the form because they were imported with a template, consider removing these. It requires time and memory to render forms. Forms with upwards of 200 fields will draw slower on the device and panning around a form will be slower and may not be smooth if there are too many fields present.

In some cases, certain fields may scrunch up and overlap slightly on the mobile device. An algorithm is used by the mobile applications to convert form position defined in the web into form position in iOS and Android. In some cases the width differences of labels and special fields like date/time and Boolean fields may cause fields to not line up nicely on the form. In this case the solution is to adjust the form design in Lucity Administration Tools in the form designer.

Notes: _____
