lucity™
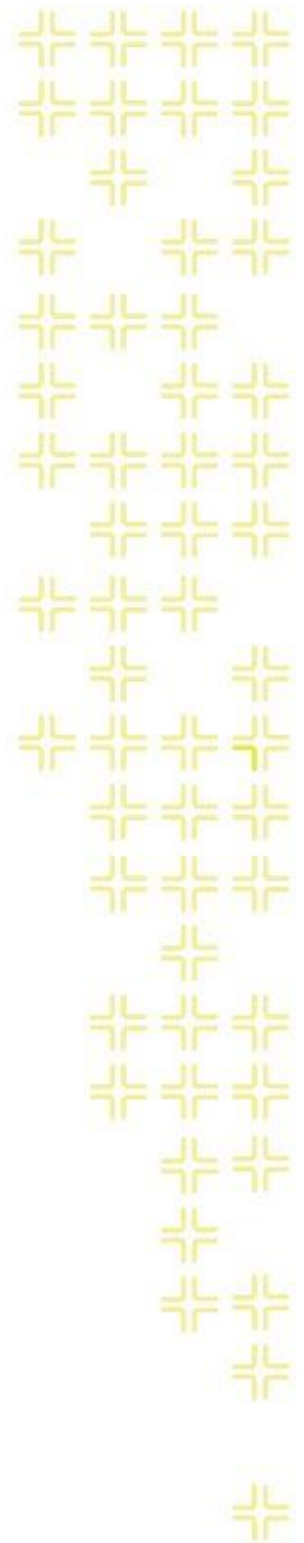
TRAINING GUIDE

Lucity Mobile
Signature Capture

Lucity Mobile: Signature Capture

Table of Contents

Overview

This feature allows you to collect a signature and associate it to a specific record. For example, you might want to store a signature for an inspection or for a request. Please note: These signatures do not meet the minimum criteria for being considered legally binding. Signature Capture requires that your server be on Lucity 2017r2 or later.
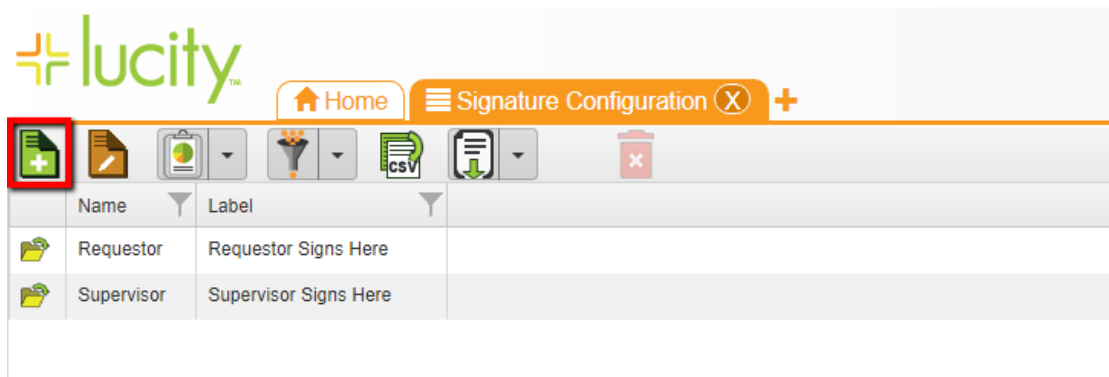
Signature Configuration
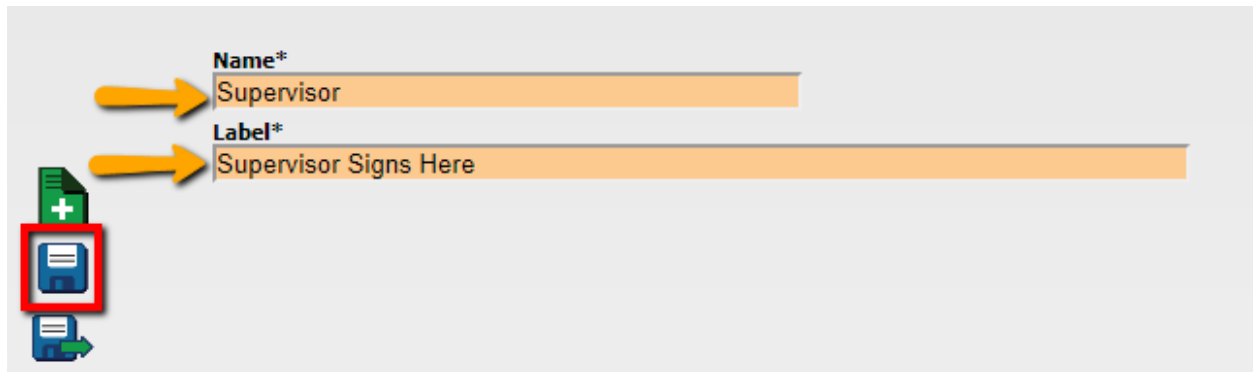
The first step is to configure a signature to be used.

From the web, open the Modules Menu and navigate to System Configuration > Signatures.
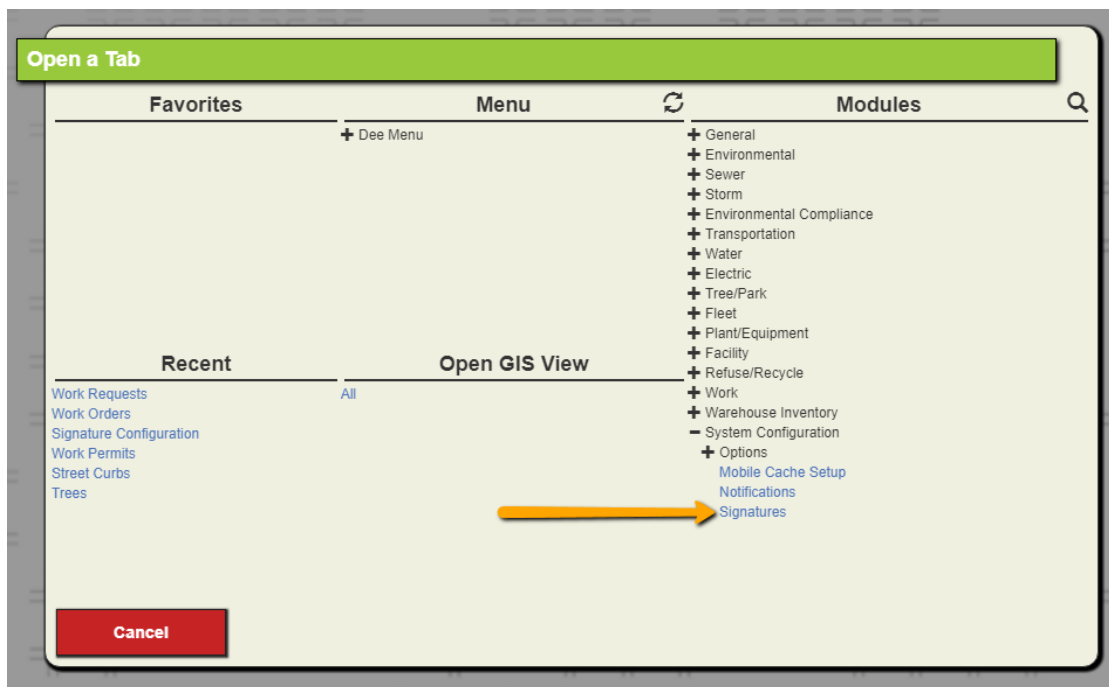
Click the [icon] button. The *Signature Configuration* form appears.

Enter a **Name** and a **Label** for the signature. Both are required. The label is the text that will appear when the signature is captured. Click the 💾 button to save the record.


Repeat this process for any other signatures you want to configure.

Please note that once you begin using a Signature, you are not able to change the name. You can change the label.

Attaching a Signature to Form

Before a user can start capturing signatures the signature configuration record must be attached to a form. The signature is tied to a specific form (or forms), so if your organization uses multiple forms in a module you'll want to make sure that you are putting the signature on the correct form(s) for the group(s) you want to have access to it.

To add the signature to your form, open the Lucity Administration Tool. Go to the Forms > View/Form Manager.
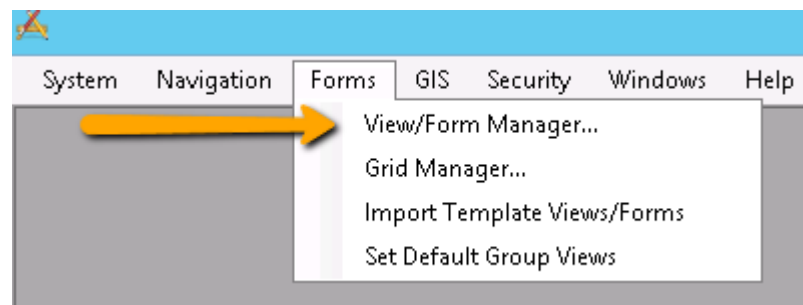
Use the three dropdowns to find the module where you want to add the signature. Find the appropriate form, select it, and click **Edit**. (If you are unsure which form is attached to your view, open the view and edit the form from there).

Once the form is open, expand the Form Details using the [icon] button on the toolbar. Now Click the *S* button on the toolbar.

You will see a Signature Field added in the top pane of the Form Details. (Note: you may also notice that the field is added to the form. You'll see a component handle – the black dot – with no field beside it. This is for attachment purposes only. The signature will not appear on the form so the location of the field is irrelevant.)

In the top pane on the left, select the Signature Field that you just added. In the bottom pane on the left, use the Signature Configuration drop down to select a signature that you added during the Signature Configuration section above.

In the bottom pane, the last field is "OverrideLabel". If you want to use a different label for the signature, type the new label here and when you save your changes, the label will change for this signature. This applies only to this form.

Repeat this process to add any further signatures. Then Save changes to the form and Close it.

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Collecting Signatures

Now, a signature is ready to be collected. Within the mobile app is the only way you can see if there are signatures available for a record and whether or not they have been collected. The ability to see signatures is not currently available in the web app.

Android

In the Android application, navigate to the module and record where you want to collect a signature. Either long tap the record to select it or open the form for the record. Tap the ⋮ button and select **Signature**.
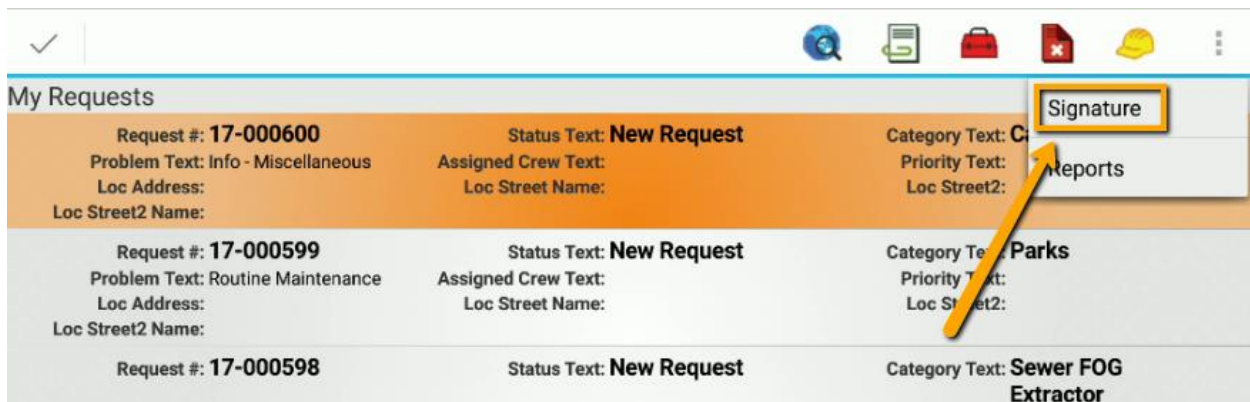
The following pop-up will appear with a list of possible signatures that can be collected for this this record:
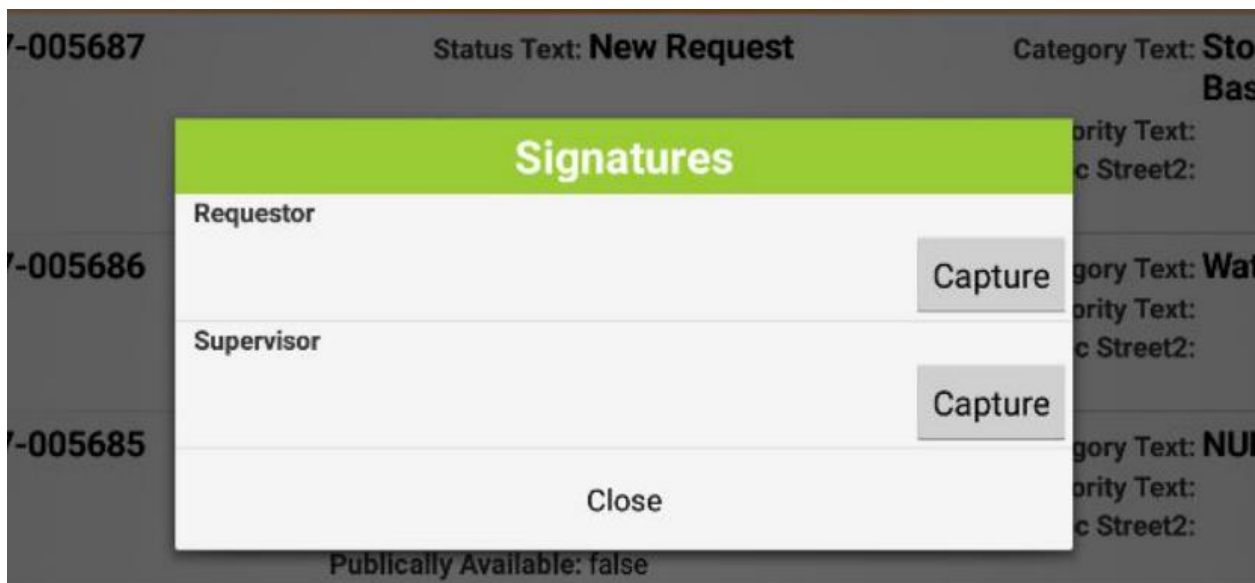
Tap **Capture** next to the signature that you want to enter. The signature capture window will open.

You'll notice the label you configured earlier shows at the top of this dialog. The person giving the signature signs in this box.
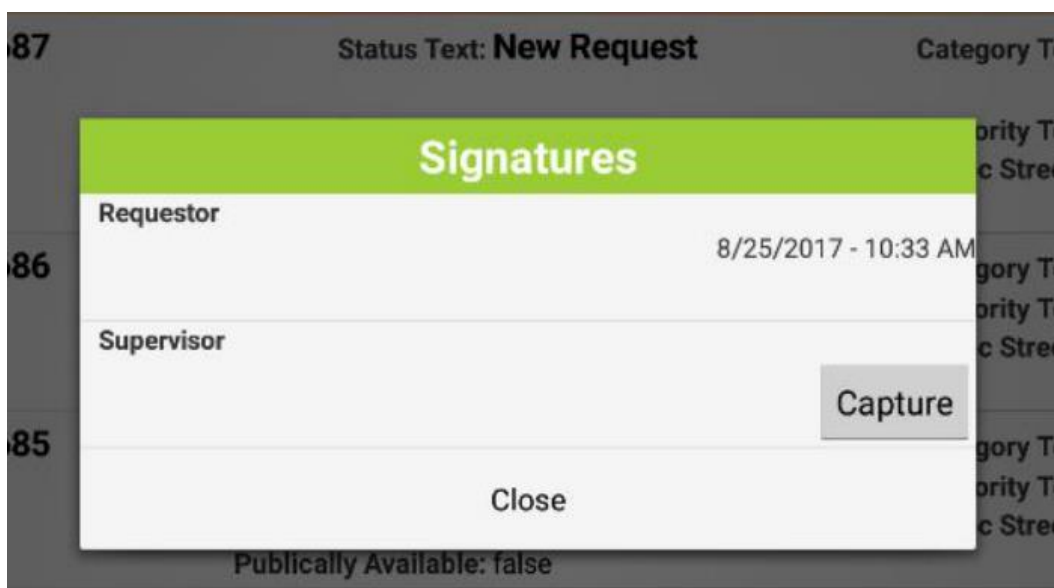
The signer can **Clear** the signature and try again or can **Cancel** to return to the list of available signatures. If the signature is acceptable tap **Close**. The following pop-up then appears:

The person asking for the signature can either **Reject** or **Accept** the signature. If the signature is accepted, that signature is locked and cannot be changed or deleted. In the list of available signatures, it will now show the date and time that signature was collected.

iOS

In the iOS application, navigate to the module and record where you want to collect a signature. Either long tap the record to select it or open the form for the record. Tap the ⬆️ button and select **Signature**.

The following pop-up will appear with a list of possible signatures that can be collected for this this record:

Tap **Tap to Sign** next to the signature that you want to enter. The signature capture window will open.

You'll notice the label you configured earlier shows at the top of this dialog. The person giving the signature signs in this box.
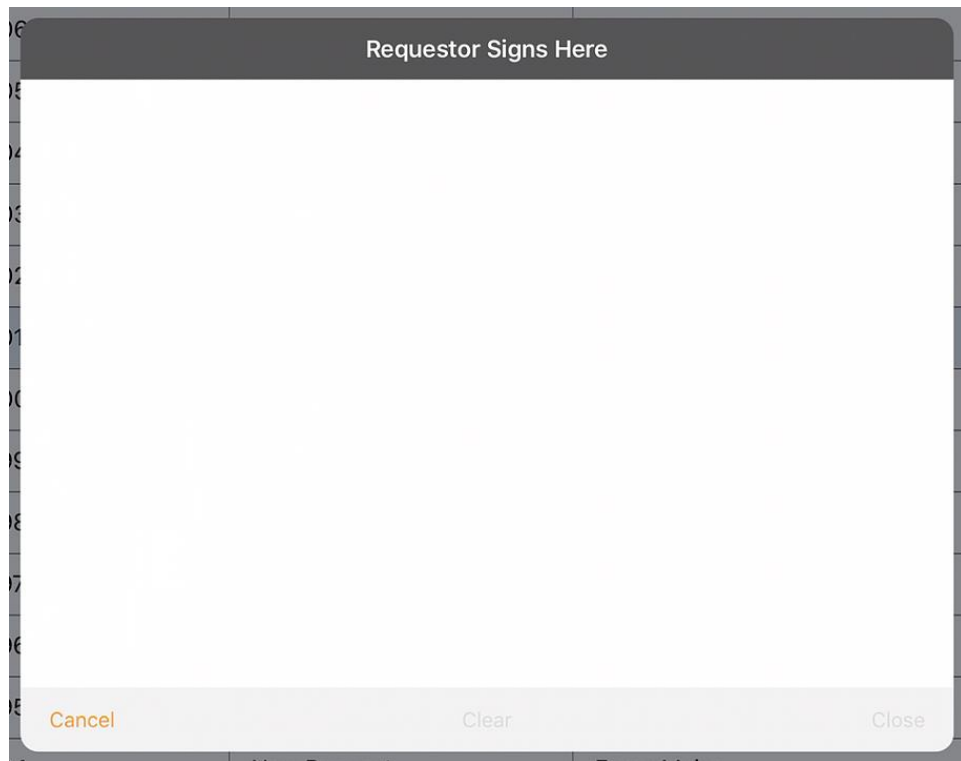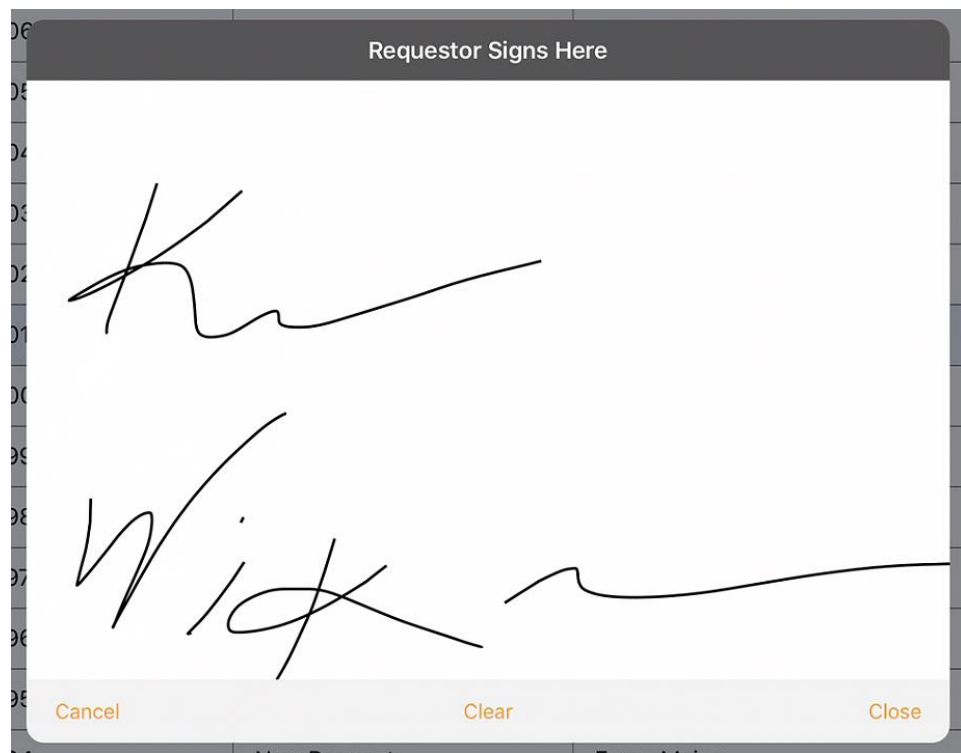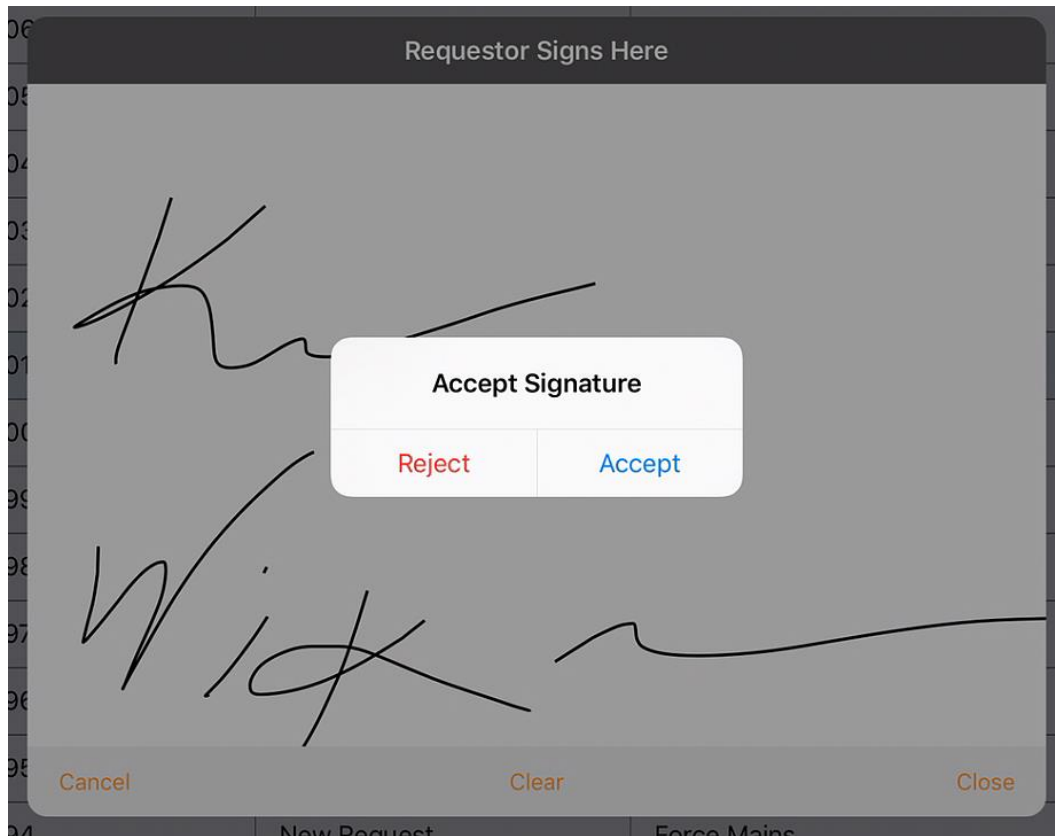
The signer can **Clear** the signature and try again or can **Cancel** to return to the list of available signatures. If the signature is acceptable tap **Close**. The following pop-up then appears:

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Signature Reports

In order to actually see the image of the signature that was collected, you must run a report that includes the signature fields. You can do this from the web app or from the mobile app. Here is an example of a report that includes signatures:

```
8/31/2017

The following information relates to your request:

    Category :    Fleet Maintenance
    Problem :     Preventative Maintenance
    Cause :       Oil Change

The work supervisor has reviewed the request on-site for further required
action.

    Supervisor :    Tom Gandy
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Acknowledgement

Supervisor

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