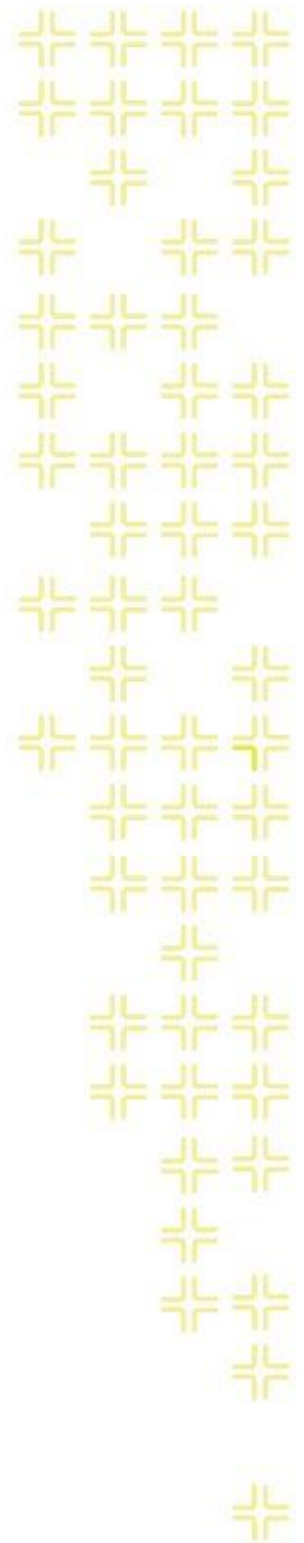




TRAINING GUIDE

# Lucity Mobile

## Signature Capture



# Lucity Mobile: Signature Capture

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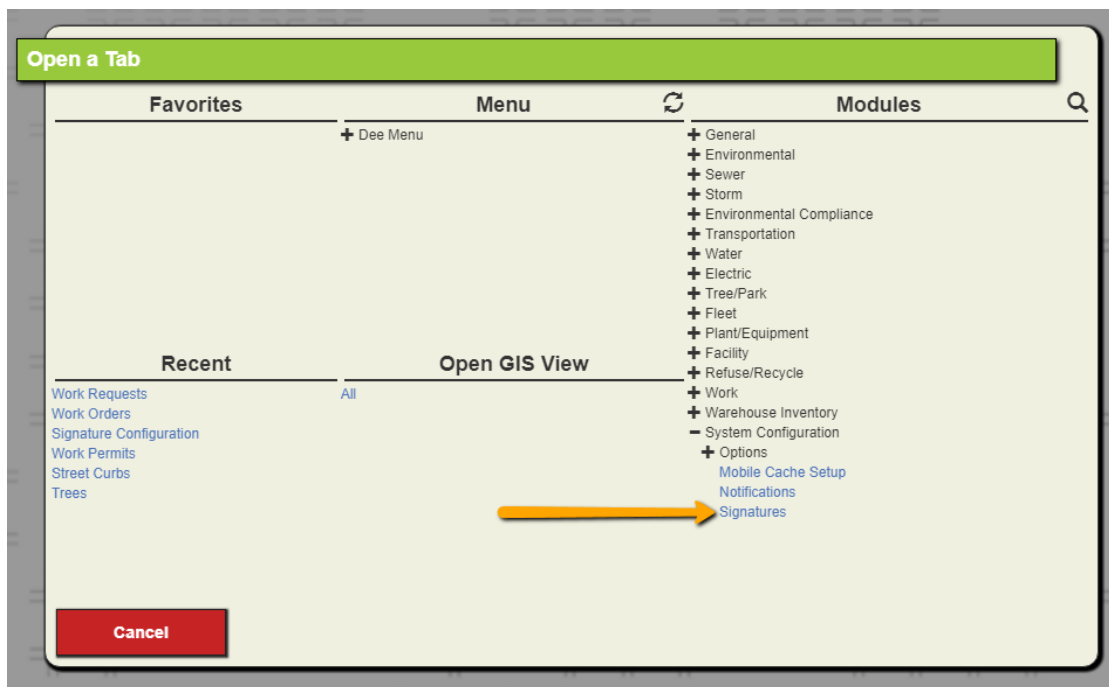
## Overview

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 Lucy 2017r2 or later.

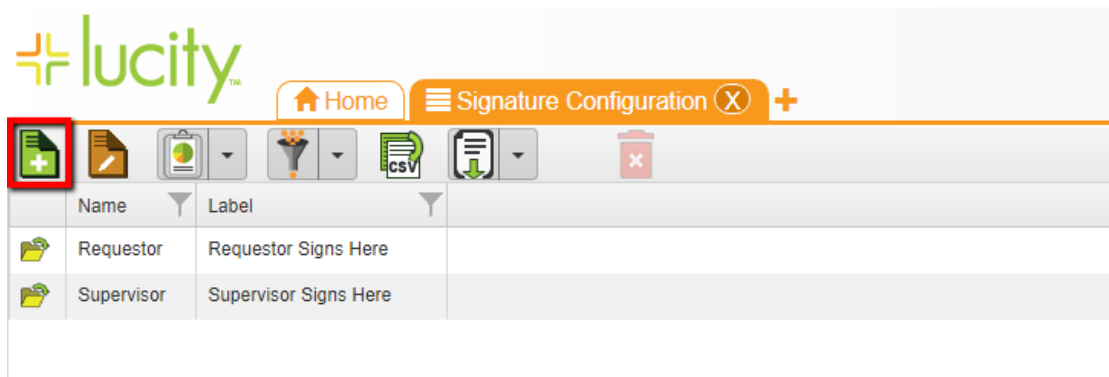
## Signature Configuration


The first step is to configure a signature to be used.

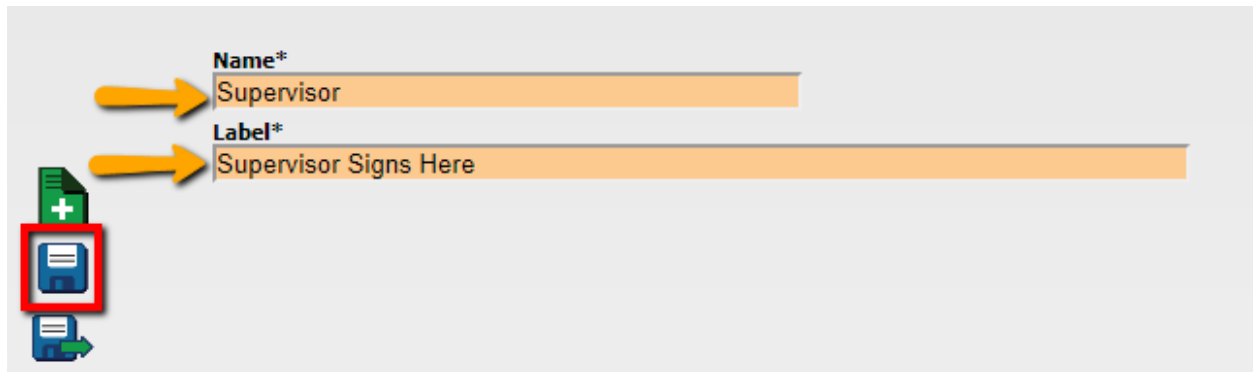
From the web, open the Modules Menu and navigate to System Configuration > Signatures.



Click the  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.




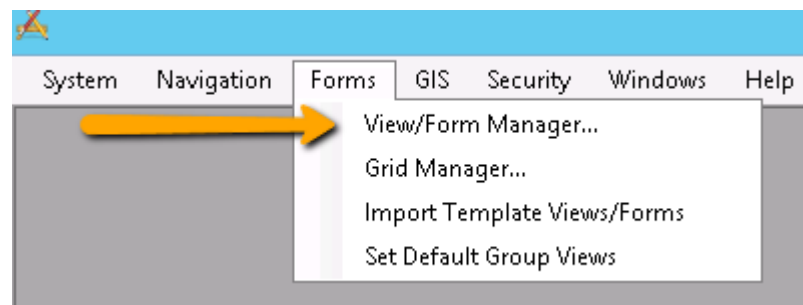
Repeat this process for any other signatures you want to configure.

*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 Lucy 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).

View/Form Manager

STEP 1: Select Program Work

STEP 2: Select Module Work Requests

STEP 3: Select Module Component Work Requests

☐ Show forms in preview mode

☒ Forms

☒ Views

**5 Views/Forms**

Name	Type	Enabled	Is Default View	Assigned To Group	Assigned To Menu	Public FormID
DSK Work Request	View	True		In Group	NOT ASSIGNED	
DSK Work Request Form	Form	True		In Group	NOT ASSIGNED	
Work Request_Full	View	True	Yes	In Group	NOT ASSIGNED	
Work Request_Full Form	Form	True		In Group	NOT ASSIGNED	
Work Request_With Location Submitt...	Form	True		In Group	NOT ASSIGNED	CITIZENID

New Edit... Copy... Delete Rename... Assign Group... Import Templates... ☐ Enable Exporting Export

Once the form is open, expand the Form Details using the button on the toolbar. Now Click the button on the toolbar.

Form Editor - Work Request\_Full Form

Form Edit View

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.

The screenshot shows the 'Form Editor - Work Order\_Full Form' interface. On the left, there are two panes. The top pane lists various fields, with 'Signature Field' highlighted. The bottom pane shows the 'SignatureConfiguration' table with the following data:

Component	ComponentType	Signature
SignatureField	Signature	

The main form area displays a 'Billing' section with various input fields, including 'Bill Cust ID', 'Bill Cust No', 'Bill Cust Last Name', 'Bill Cust Address', 'Bill Cust City', 'Bill Cust Phone', 'Bill Cust State', 'Bill Cust Zip', 'Contact Name', 'Billing Amount', 'Date Bill Sent', 'Payment Recvd', 'Payment Method', 'Bill Cust Name', 'Bill Cust Last Name', 'NUNIT', 'Bill Cell #', 'Bill Fax #', 'Bill E-mail', 'Billing Required', 'Billing Processed', and 'Imported to Finance'. The 'OverrideLabel' field in the 'SignatureConfiguration' table is highlighted, indicating the label for the signature field.

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.

**Notes:** \_\_\_\_\_

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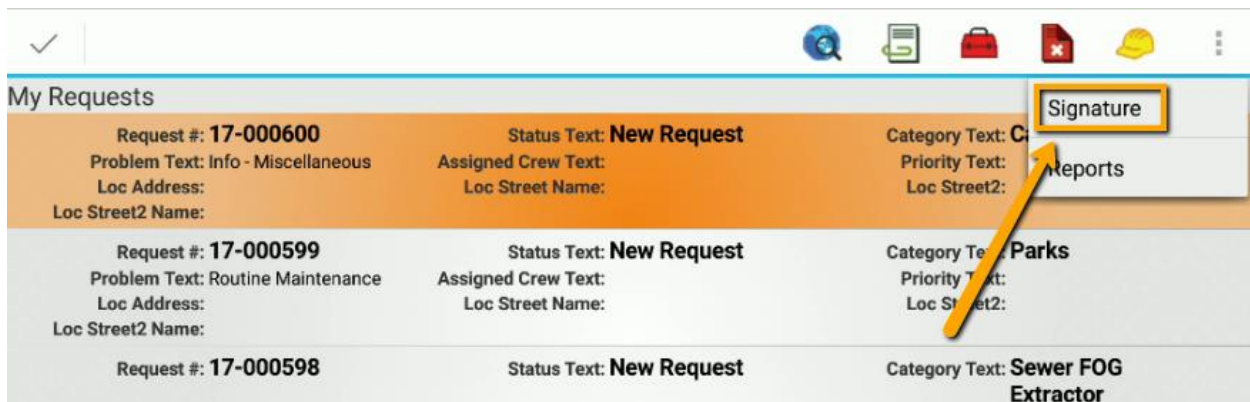
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## Collecting Signatures

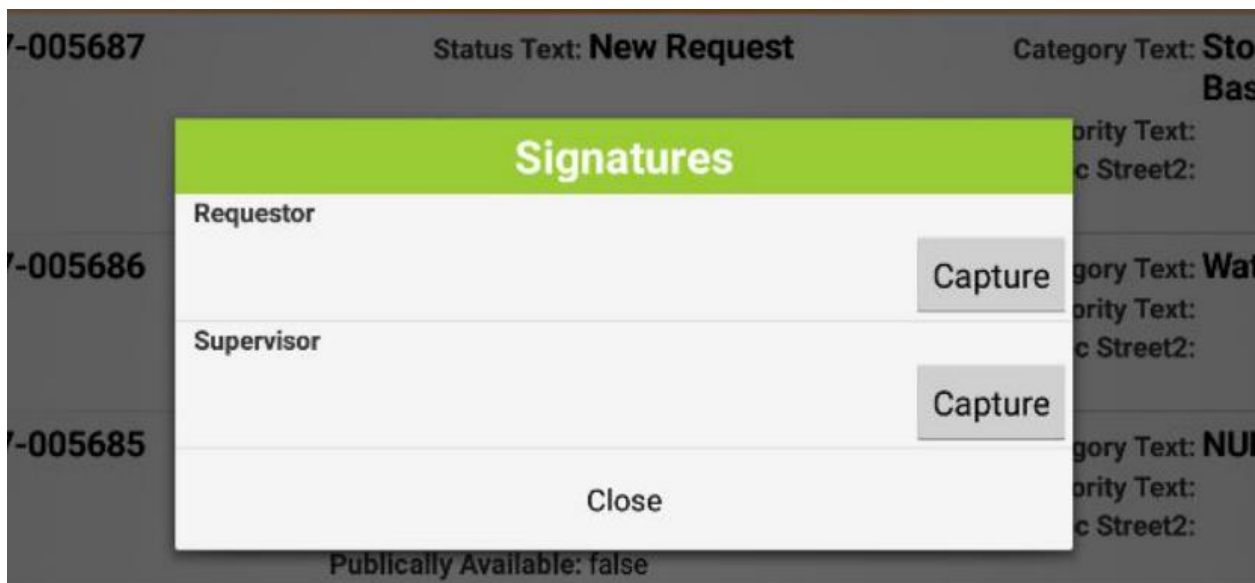
Now, a signature is ready to be collected. Within the mobile app is the only way you can see if there are signatures available for a record and whether or not they have been collected. The ability to see signatures is not currently available in the web app.

### 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.

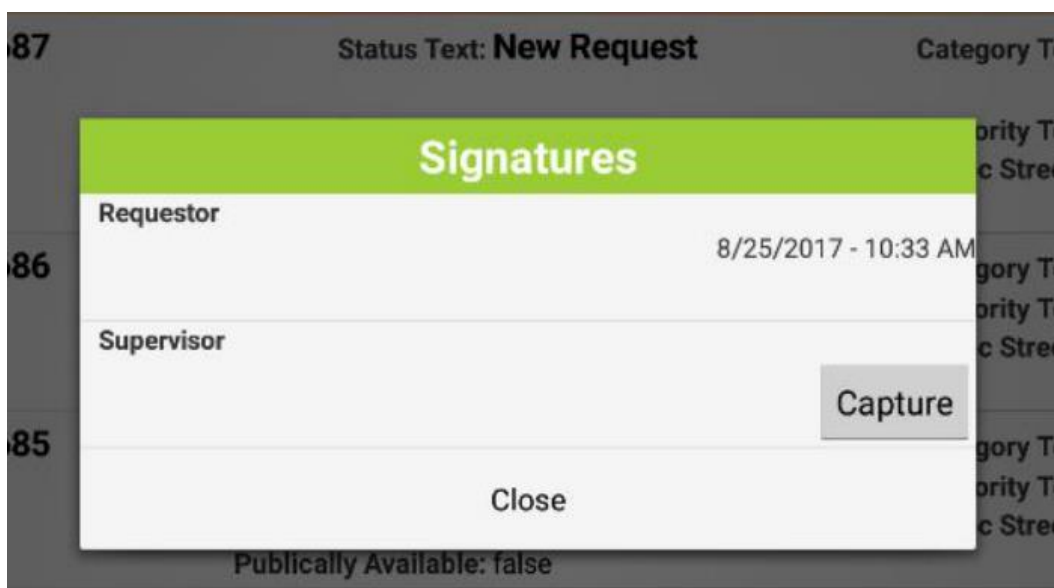





The signer can **Clear** the signature and try again or can **Cancel** to return to the list of available signatures. If the signature is acceptable tap **Close**. The following pop-up then appears:



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

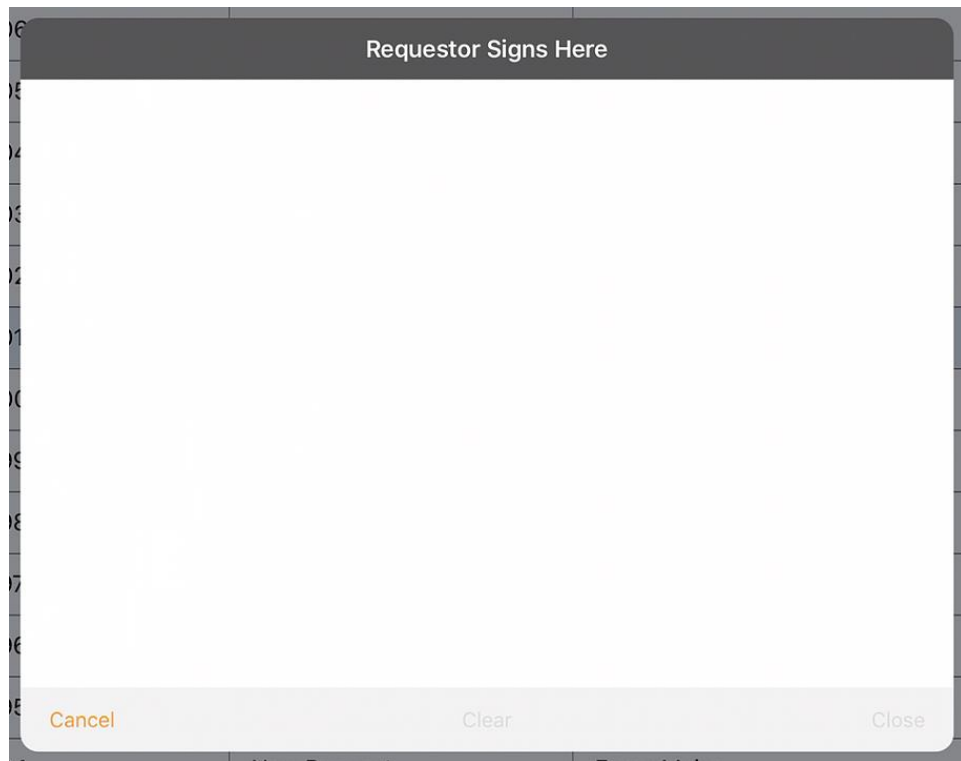
In the iOS application, navigate to the module and record where you want to collect a signature. Either long tap the record to select it or open the form for the record. Tap the  button and select **Signature**.



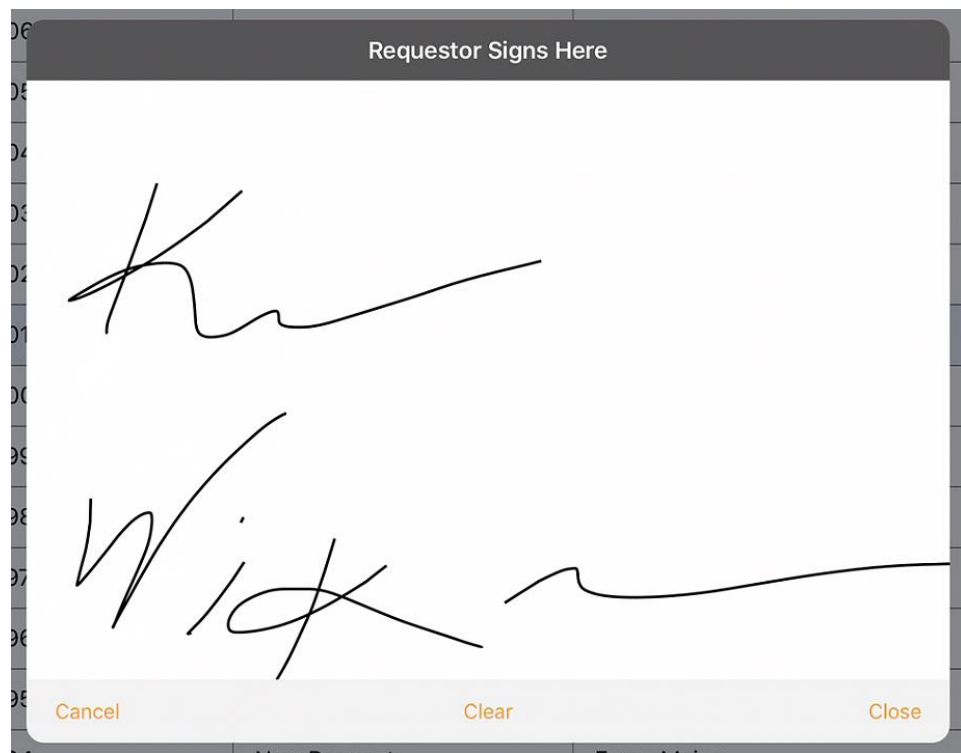
The following pop-up will appear with a list of possible signatures that can be collected for this this record:



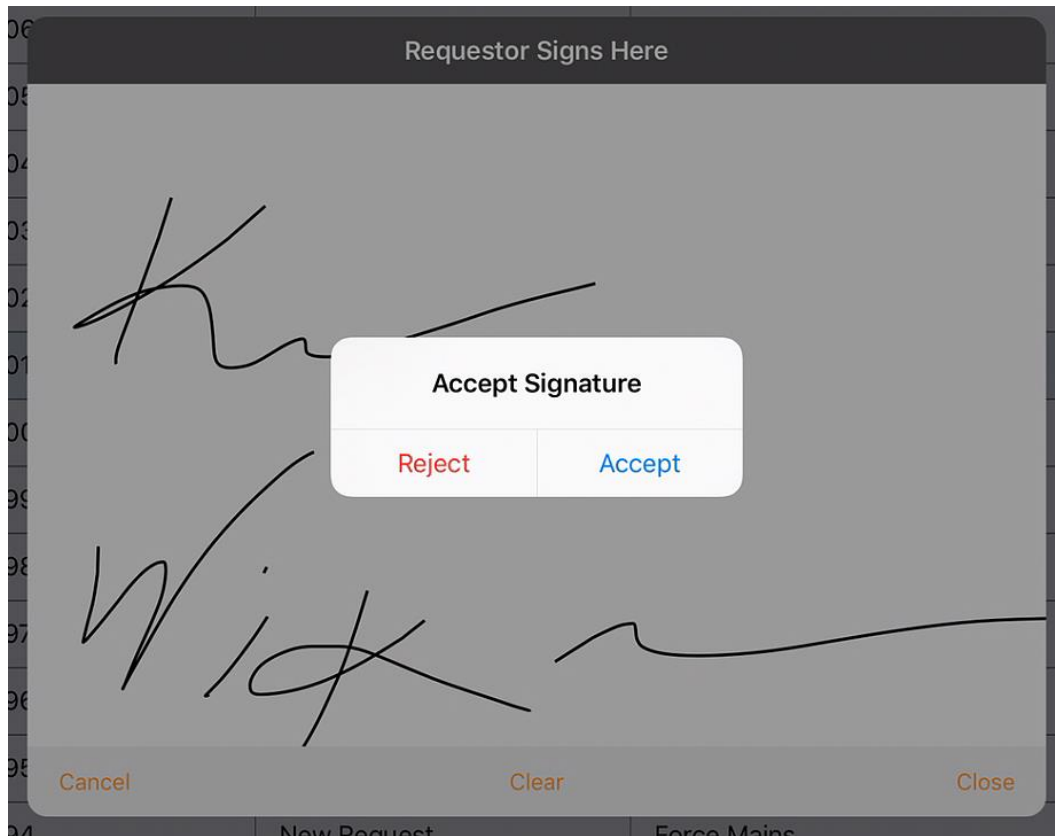
Tap **Tap to Sign** next to the signature that you want to enter. The signature capture window will open.



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:



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.



## 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

**Acknowledgement**

Requestor

**Supervisor**

Supervisor

**Notes:** \_\_\_\_\_  
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