Lucity Mobile Android: Basic Functionality

Table of Contents

Dashboard 2

Plugin Types 3

Modules List 6

Menu 7

Views 8

View Toolbar Functions 9

Selection Mode 10

Record Count and Navigation 11

Forms 12

Form Toolbar Functions 13

Navigating through Forms and Child Views 13

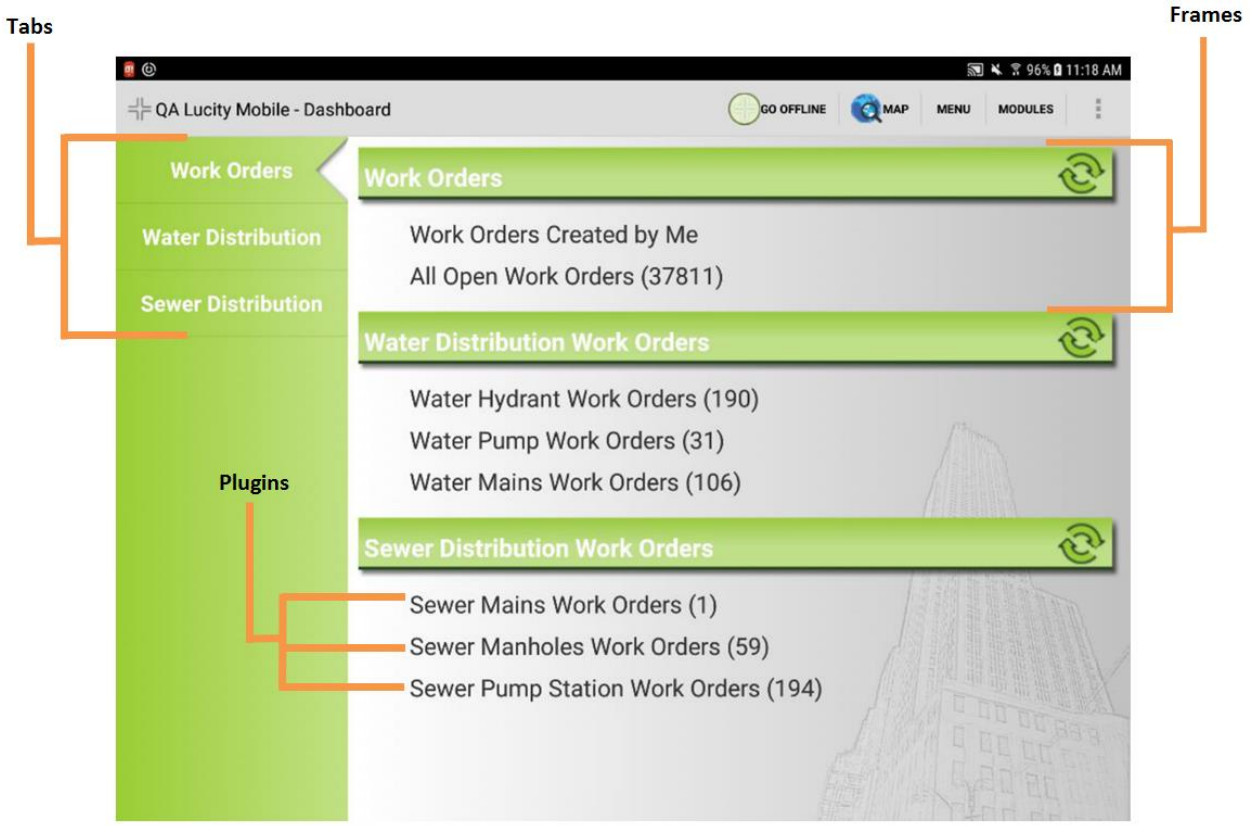
Fields and Popups 14

Map 17

Toolbar Functions 18

Dashboard

The Dashboard is the first page that appears after logging into the app. It contains overview data that users can use to identify what they want to look at and then quickly jump to a more detailed view of that data.

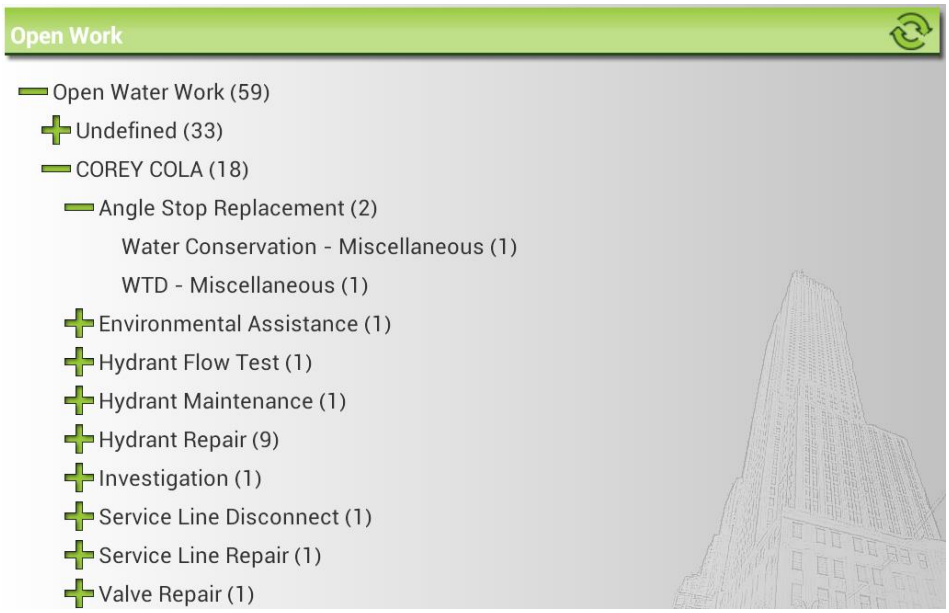


Dashboards are made up of Tabs, Frames, and Plugins.

- **Tabs** – Tabs are found on the left of the screen and help to organize data in general groups. Tap on a tab to switch the view on the right to display that tab's frames.
- **Frames** – A frame is a space on the dashboard that contains Frame Plugins. These help to organize data into specific groups.
- **Plugins** - Plugins are stored in frames and are what display specific groups of data.

Plugin Types

Data Drills - These take data from a module, filter it down, and then group the remaining records based on common attributes.



- The number in parentheses is a count of records
- Tap on the + and − buttons to expand or collapse a level of data
- Tap on a level of the drill to open the related record(s) in the related view.

Notes:_____

_____

_____

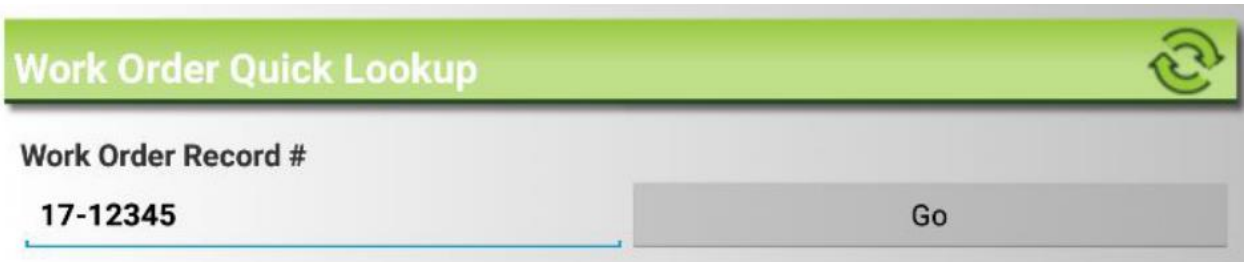
_____

_____

Asset Trees - These group assets together based on module and relationship. They work for Site, Building, Equipment, Plants, and Parks and they can be based on a filter. The tree will show a list of records for the selected module. Expanding one of those records will show child records related to that record.

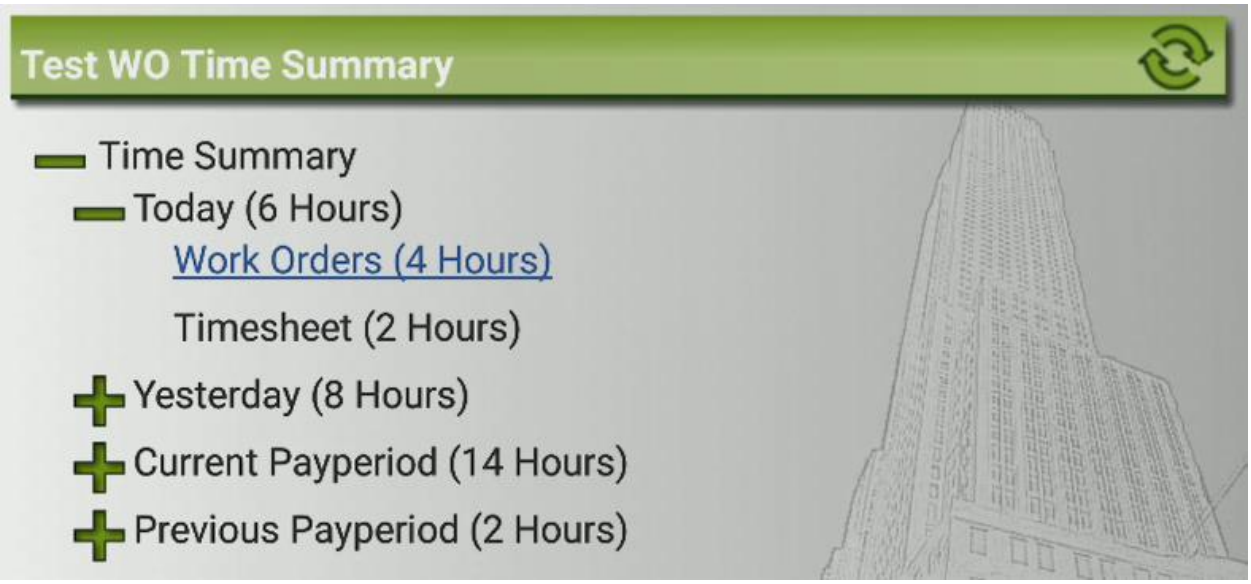
- The number in parentheses is a count of records
- Tap on the + and − buttons to expand or collapse a level of data
- Tap on an Inventory or Record name to open the related record(s) in the related view.

Quick Lookups - These enable users to search for a specific record in a specific module. The search is performed on the Common ID. Each lookup is configured to work on a specific module and will open the matching record in the specified view.



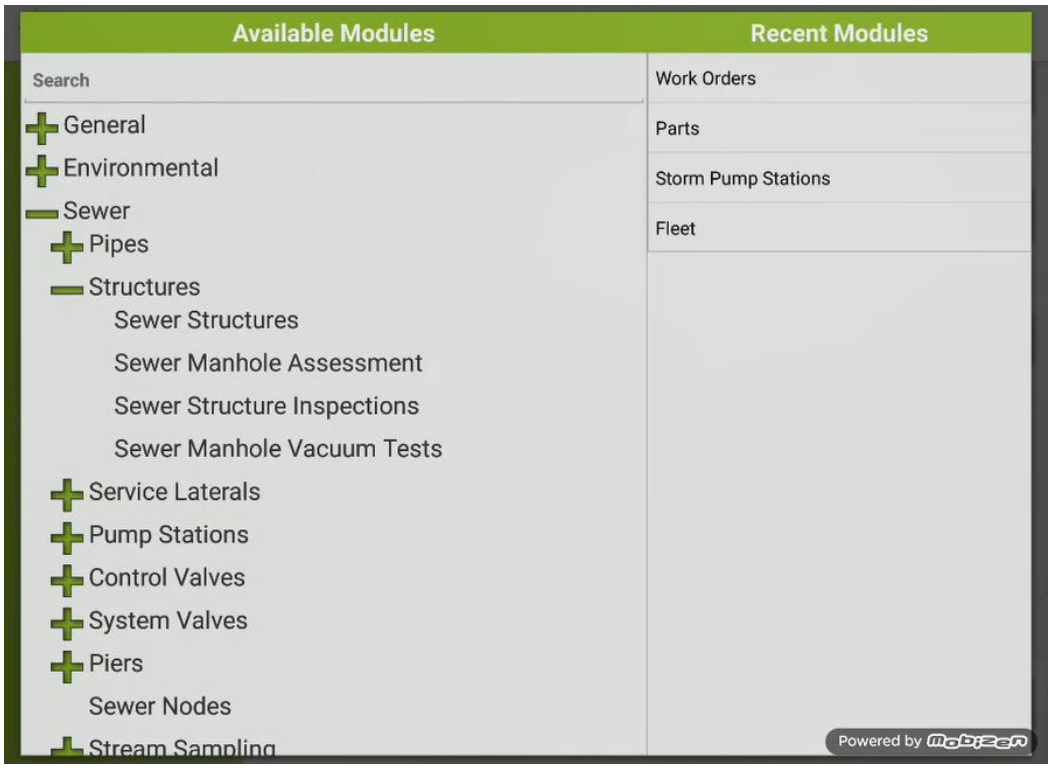
URLs - These enable users to add a URL to another website. The plugin displays text that contains an embedded URL and tapping on that text will open the web page in a browser on the device.

Time Summary – This plugin displays the current users recorded time. It displays today's time, yesterday's time, all time for the current pay period, and all time for the previous pay period. Time displayed is broken up between work order and timesheet entries.



Modules List

One of the options on the Dashboard is the **MODULES** button. Tapping this button opens the modules list. This list allows users to navigate through the Lucity modules tree or select a module that they have opened recently. There is a search available at the top of the list.



- Tap the + and − icons to expand or collapse a level of the list.
- Tap on a module name to open that Module View.
- Tap on a module name in the Recent Modules list to open that module. These are listed in order of use.
- Use the search at the top to find a specific module

Notes:_____

_____

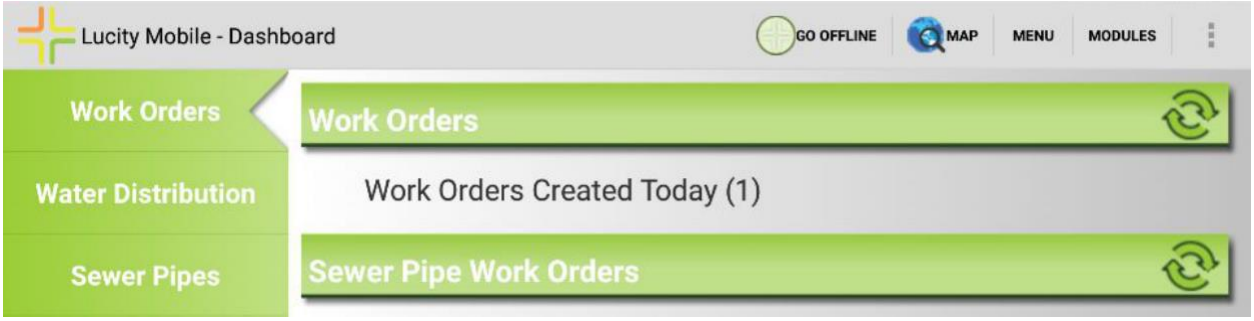
_____

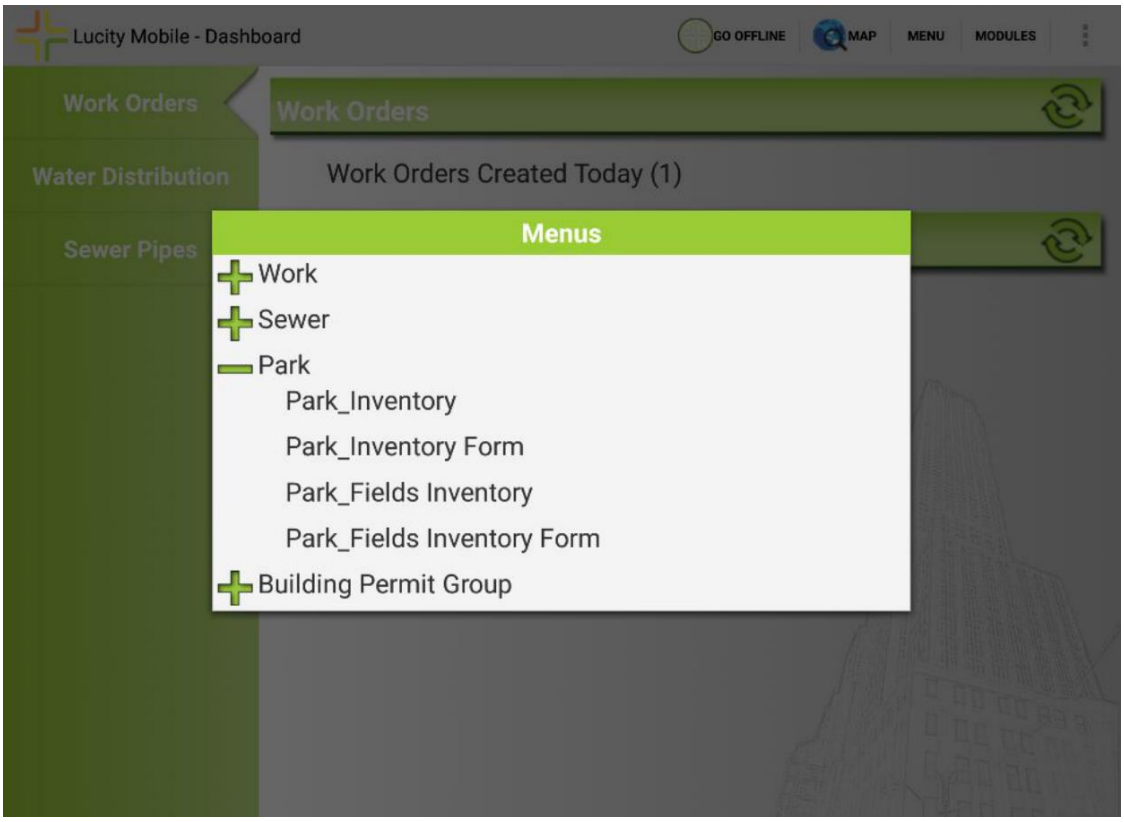
_____

_____

Menu

One of the options on the dashboard is the **MENU** button. A menu allows users to create a list of commonly used views or forms in an expandable list. The user can configure a group or multiple groups and then put specific items in each of those groups. Each item is a link and when the user taps on that link, it opens that view or form.





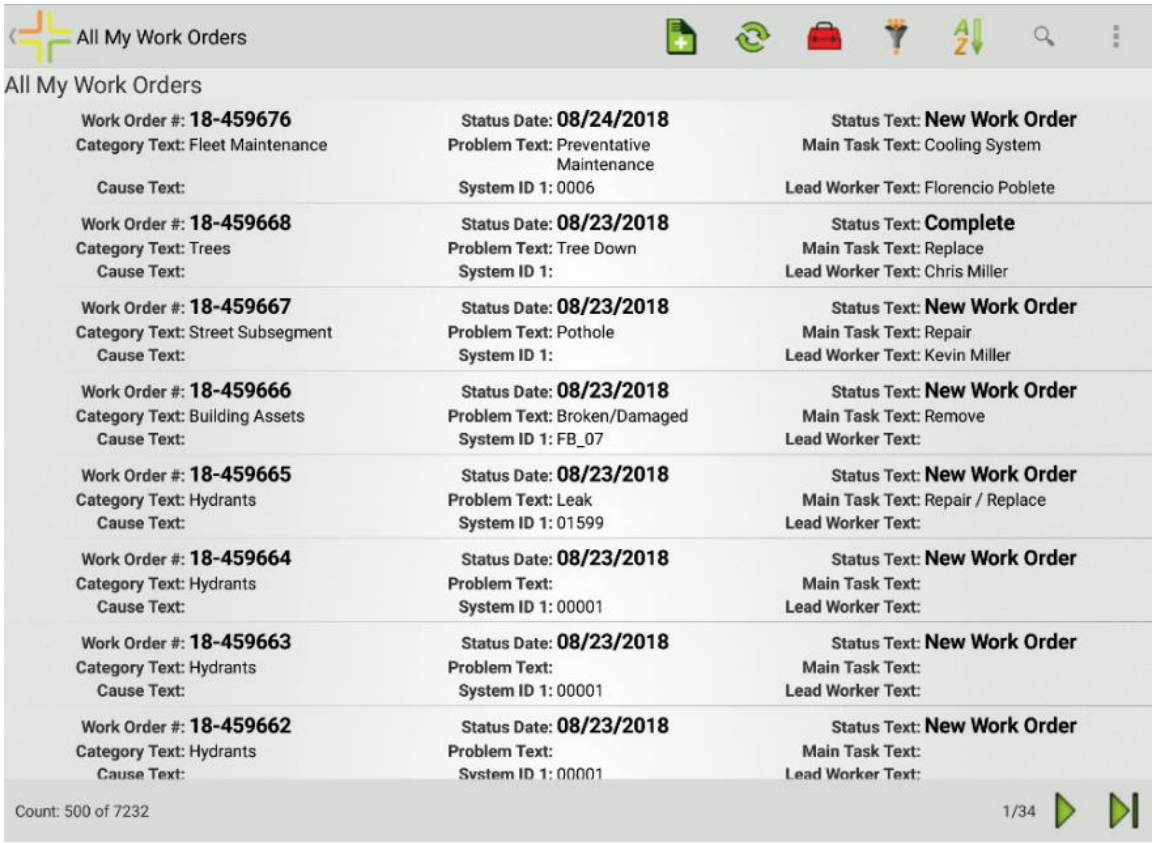
- Tap the + and − icons to expand or collapse a level of the menu.
- Tap on a link name to open the View or Form.

Views

Views are lists of records that display general information about each record. They allow users to search for and select records for more details review, create new records, or delete records.

There are two types of views. Both views serve the same function and have the same tools. They are just found at different levels of the program.

- **Module Views** - When users select a set of records from a dashboard plugin, or navigate to a module using the **MODULES** button, the app will open to a Module View. The module view provides a list of records in the module. When a user taps on a record in that list it opens that record in a Form. On a Form, users can select the 2nd type of View.
    - **Example:** In the Work Order View a user taps on a work order. The Work Order Form will open with all the information for that work order.
- **Child Views** - When a user is looking at a Form, they can choose to see the current record's children using the Lucity Toolbar. Child records are records attached to the main record. Child records are displayed in Child Views. Tapping on a record in a Child View opens that child record in a Form.
    - **Example:** On a Work Order Form a user taps on the blue link for Tasks to see all the tasks attached to the Work Order.



- Tap on a record to open it in the related form. Forms allow users to view more detailed information about the record and edit the record (see the Forms section for additional information).
- Long tap on a record to select it and enter Selection mode. Selection mode allows users to select multiple records and run special tools against one or more records.
- Swipe up to scroll down through the list.

View Toolbar Functions

The View Toolbar appears at the top of the module view and provides tools to interact with the view.

	Title	The left side of the toolbar displays the name of the module.
	New Record	This creates a new record in the module.
	Refresh	This tool reloads the records in the current filter.
	Filter	This tool allows users to load a filter that was created and saved in Lucity Web or Desktop. It also allows users to clear the current filter.
	Sort	This tool allows users to sort the records based on the values of one field.
	Find	This tool allows users to search for a string of characters in all fields.
	Toolkit	This button opens a list of toolkits available for the module. When no records are selected, the toolkits usually run on the entire list/filter.

Notes:_____

_____

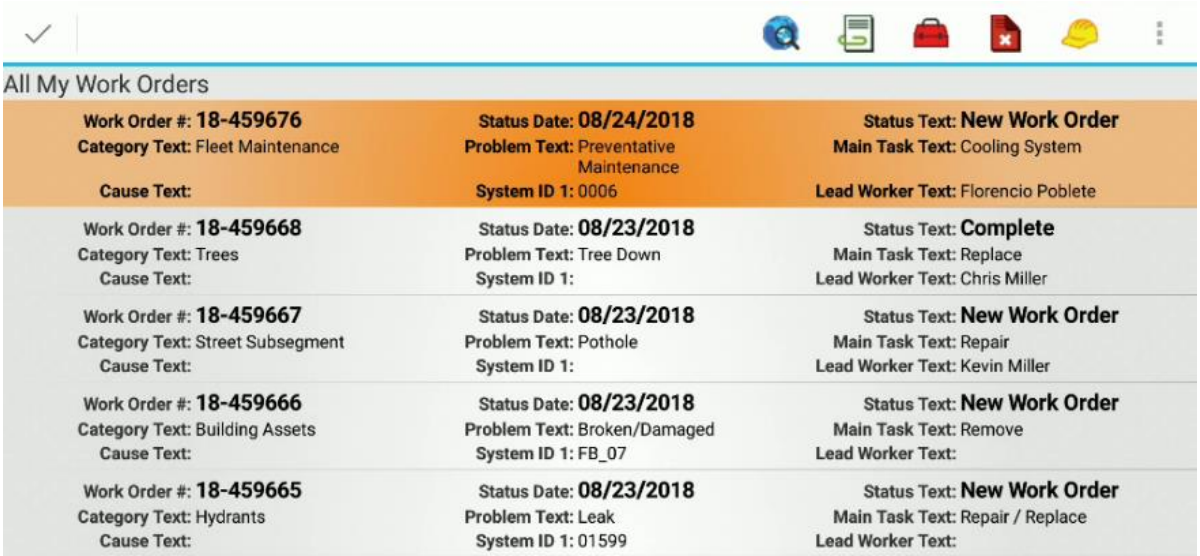
_____

_____

_____

Selection Mode

Long tap on a record to select it and enter selection mode.



In selection mode the selected records are highlighted in orange and the toolbar will change. While in selection mode, you can select one or multiple records. The following buttons are all available conditionally based on the view/grid open at the time.

Show In Map	On the Dashboard this button launches the map. In a module this button launches the map and zooms to the selected record(s).
Documents	View and attach documents to the selected records. Will attach pictures and videos stored on the device.
Delete Record(s)	This button appears after entering Selection Mode. Tap it to delete the currently selected record(s).
Toolkit	This button opens a list of toolkits available for the module. When in selection mode, the toolkits run on the selected records.
Create Work Order	This instantly creates a work order on the selected asset. The created work order will have a Work Order asset record attached with the asset information. It then opens the work order view showing only the newly created work order.
Create Request	This instantly creates a work request on a selected asset. The created work request will have the asset information populated in the appropriate asset field. It then opens the work request view showing only the newly created work request.
Open in Another View	This button allows the user to open the selected record in another view.

Record Count and Navigation

At the bottom of the view is another toolbar that provides a record count and the navigation tools. The number of records on a page is controlled by the Page Size setting.

- The record count appears to the bottom left and displays the number of records that are in the current filter for this module.
- The navigation tools appear on the bottom right. In a view the records are displayed over a series of pages. The navigation tools are used to switch which pages of records are displayed. The and buttons move left and right through the pages. The and buttons jump to the first and last page of records.

Notes:_____

_____

_____

_____

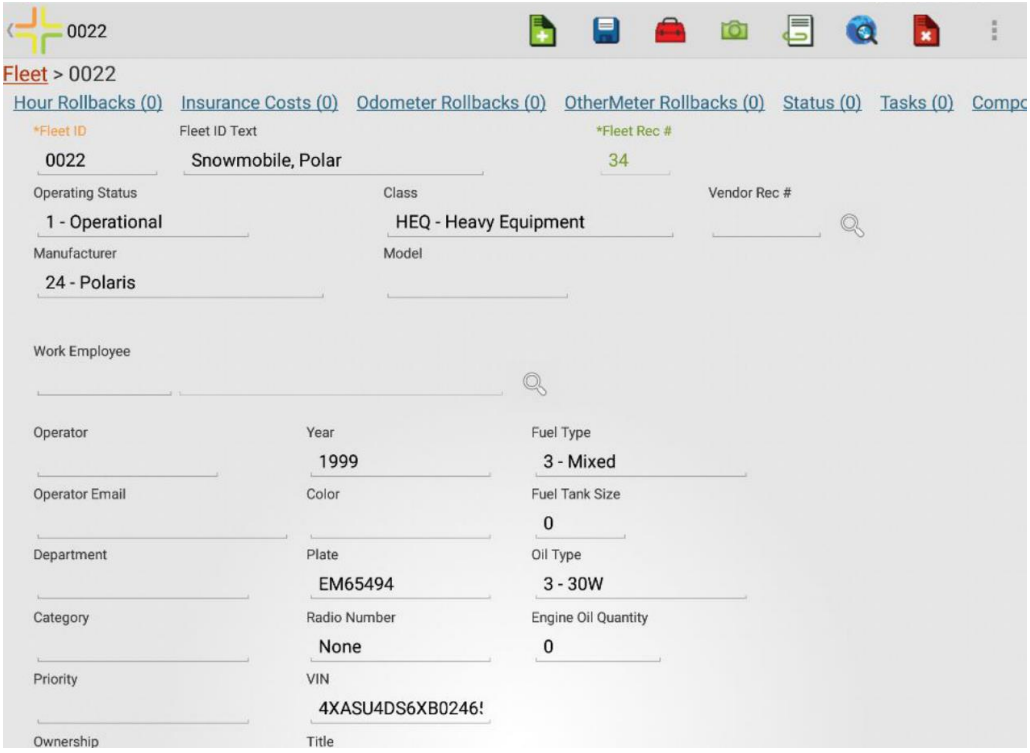
_____

_____

_____

Forms

Forms are screens within the Lucity Mobile app that allow users to edit a record's attributes and view its related child records. The first part of a form is the screen that allows users to edit the selected records attributes.



- Tap in a field to edit it.
- Swipe up to scroll down through the form.

Notes:_____

_____

_____

_____

_____

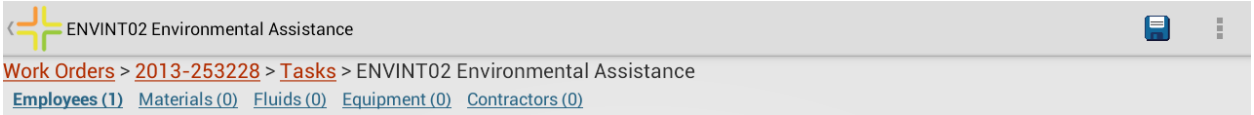
Form Toolbar Functions

The Form Toolbar appears at the top of the form and provides tools to interact with the open record. Some of the buttons from the View Toolbar are reproduced on the Form Toolbar: New Record, Toolkit, Documents, Show in Map, Delete Record. Additional buttons available are described below.

	Title	The left side of the toolbar displays the name of the module. This might also function as a drop down for the Child Tabs.
	Child Tabs	Most modules have several sets of child records. Users can access views of these child records using the Child tabs. Child tabs show in the Lucity Toolbar.
	Save	This saves the current record.
	Add Picture	This opens the tablet's camera and attaches the image/video to the record.

Navigating through Forms and Child Views

At the top of the form there are two sets of navigation links to help navigate back through a record and to find related records.



Red Links

The first set of links is red and helps users navigate back through a module. As they open child views and forms this set of links will expand to show where they are within the record.

These are made up of two types of links: Views and Forms.

- View links display the name of a type of record like Work Order or Tasks. Tapping on these links makes the app jump back to that view.
- Form links display the ID for the record that the user selected. Tapping on these links makes the app jump back to the form for that record.

The links are organized in the following way

- View Name > Record ID > View Name > Record ID > Current Record (in Black)

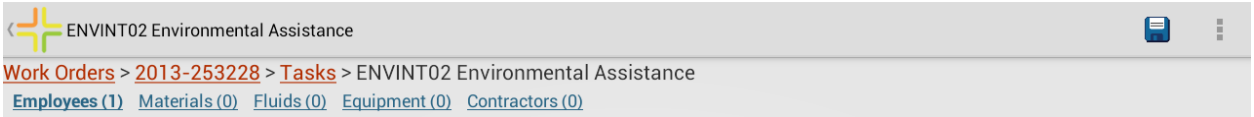
Example

- Work Orders > 2013-253228 > Tasks > ENVINT02

Blue Links

The second set of links is blue and helps users navigate to records related to the current record in the form. These are often children records. Each link displays the type of record that it represents and next to the name is the number of records of that type attached to the current record.

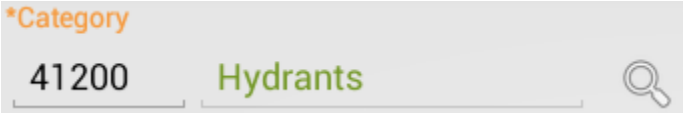
Tap on these links to open a view of that type of record.



Fields and Popups

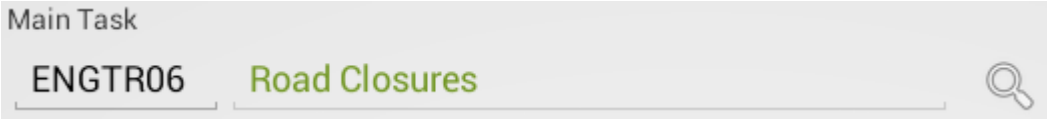
Colors

Fields that are labeled in Orange are required.

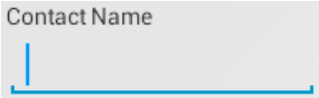


Fields that are labeled in Green are read-only.

Green text within a field was entered by the system. These fields are read-only as well.

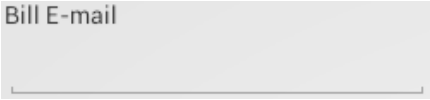


A field that is actively being edited is underlined in Blue.



Text Fields

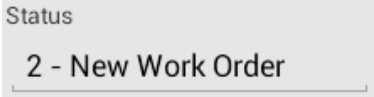
Many fields are simple text or number fields. Tapping in these fields will bring up the devices keyboard and allow users to type in a value.



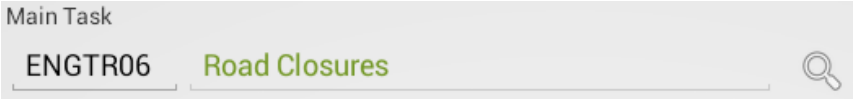
Picklist Fields

Picklist Fields can be displayed in different ways depending on system settings.

- **Example Field 1** - This picklist displays the code and type in one field. Tapping on this field brings up a pop-up picklist.



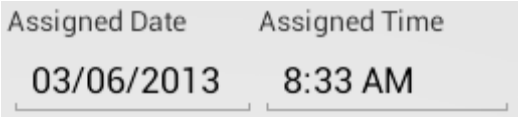
- **Example Field 2** - This picklist displays the code and type in two separate fields. The Code field is editable while the type field is read-only. Tap in the code field to manually type in the code. Doing this will auto populate the type. Alternatively tap on the button to see a popup picklist.

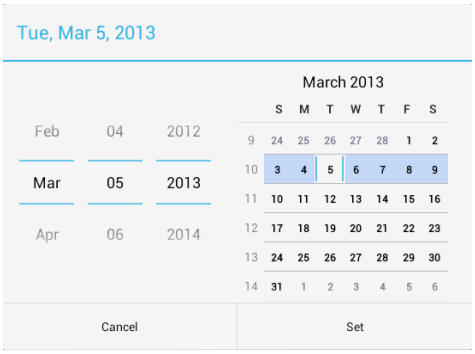


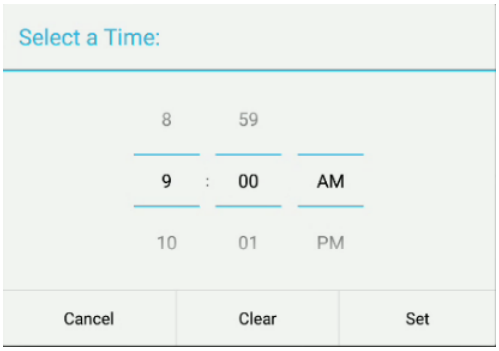
- **Selecting an Option** - Tap on an item in the picklist to select it.
- **Show All** - Tap **Show All** to toggle between a picklist that is showing only records that are associated to the current category and all records in a picklist.
- **Clearing the Field** - Tap **Clear** to remove all values from the field.
- **Searching the List** - In the top left corner of the pop-up is a magnifying glass. Tap on this to open the search field. Tap in the field and begin typing either the desired code number or description. The list will automatically be filtered based on what is typed.
- **Sorting** - In the upper right corner are two radio buttons that control how the list is sorted. Tap a button to change how the list is sorted.
- **Closing the Pop-up** - Tap the back button on the tablet or tap outside of the pop-up to close the pop-up without making a selection.

Date/Time Fields

Tapping in a date or time field will bring up a pop-up that allows the user to select the appropriate date/time.

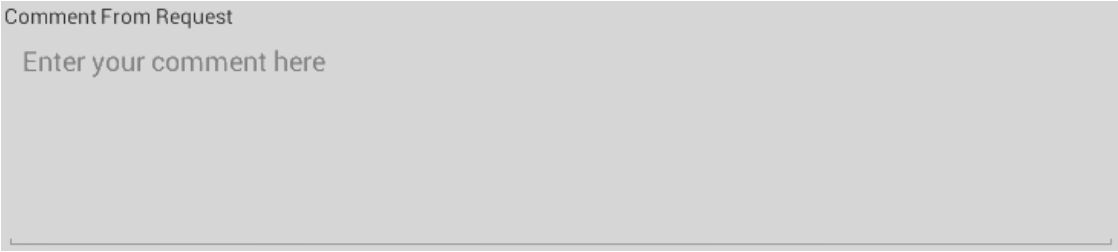






Comment Fields

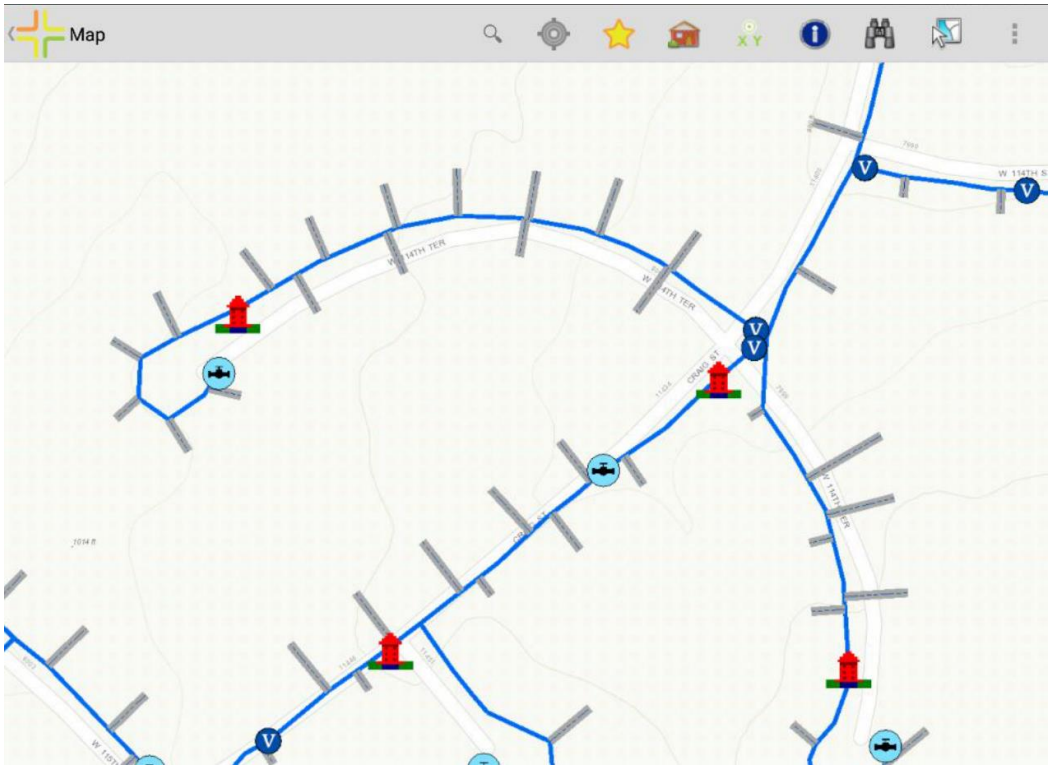
Comment Fields appear as boxes. Tap in the box to bring up the devices keyboard and begin typing. Dictate into comment fields by tapping the microphone in your keyboard.



Map

The Lucity Mobile map provides the ability to view assets in a map and interact with them.

Tap this button on the dashboard to launch the map. The user can also view an asset or location in the map by tapping the button from a view (during selection mode) or from a form.



Notes:_____

_____

_____

_____

_____

_____

_____

Toolbar Functions

Find Tools

			Also Includes
	Find Address	This tool allows users to type in an address, which is then located in the map.	
	Find Asset	This tool allows users to select a type of asset, and then type in the asset's common id. The asset is then located in the map.	
	Current Location	This tool uses the devices built in GPS to zoom the map to the user's current location.	
	Bookmarks	Allows a user to save and return to a location in the map. • Tap on a bookmark to load it in the map • Long tap on a bookmark to bring up a menu with options to Locate in Map, Edit Bookmark, or Remove Bookmark.	

Identify Tools

			Also Includes
	Identify Address	Tap on this tool and tap on a location in the map to identify the address at that location.	
	Identify X/Y	Tap on this tool and tap on a location in the map to identify the x/y coordinates at that location.	
	Identify Asset	Tap on this tool and then tap on an asset in the map to identify the asset.	

Selection Tool

			Also Includes
	Select Features	This tool allows users to choose a type of feature to select in the map. They can then tap on features in the map to add them to their selection. Users can also select multiple features at once by using the select by polygon tool.	

Map Management Tools

Map Configuration	Tap the overflow menu button and select Map Configuration for a list of available maps, map layers, and base maps.
Clear Graphics	Tap the overflow menu button and select Clear Graphics to clear all graphic layers out of the map.
Reset Extent	Tap the overflow menu button and select Reset Extent to return the map to the default extent.

Other Tools

Find Directions	This tool allows users to take the selected address and load it directly into another program on their device that can find directions to that location.
Create Work Order	This instantly creates a work order. If this tool is used on a selected asset, the created work order will have a Work Order asset record attached with the asset information. If the tool is used on an Address or an X/Y point, the created work order will have a location record attached with either the address or the X/Y coordinates. It then opens the work order form for editing.
Create Request	This instantly creates a work request. If this tool is used on a selected asset, the created work request will have the asset information populated in the appropriate asset field. If this tool is used on an address or an X/Y point, the created work request will have that information populated in the appropriate fields. It then opens the work request form for editing.
Create Inspection	This tool allows users to create in inspection record for the asset. This tool will only appear if the asset module has a standard inspection module.
View Relationships	This opens a pop-up displaying all the records in Lucity that are related to this asset. This includes Inventory, Inspection, Work Order, Request, etc...