Lucity Mobile iOS: Basic Functionality
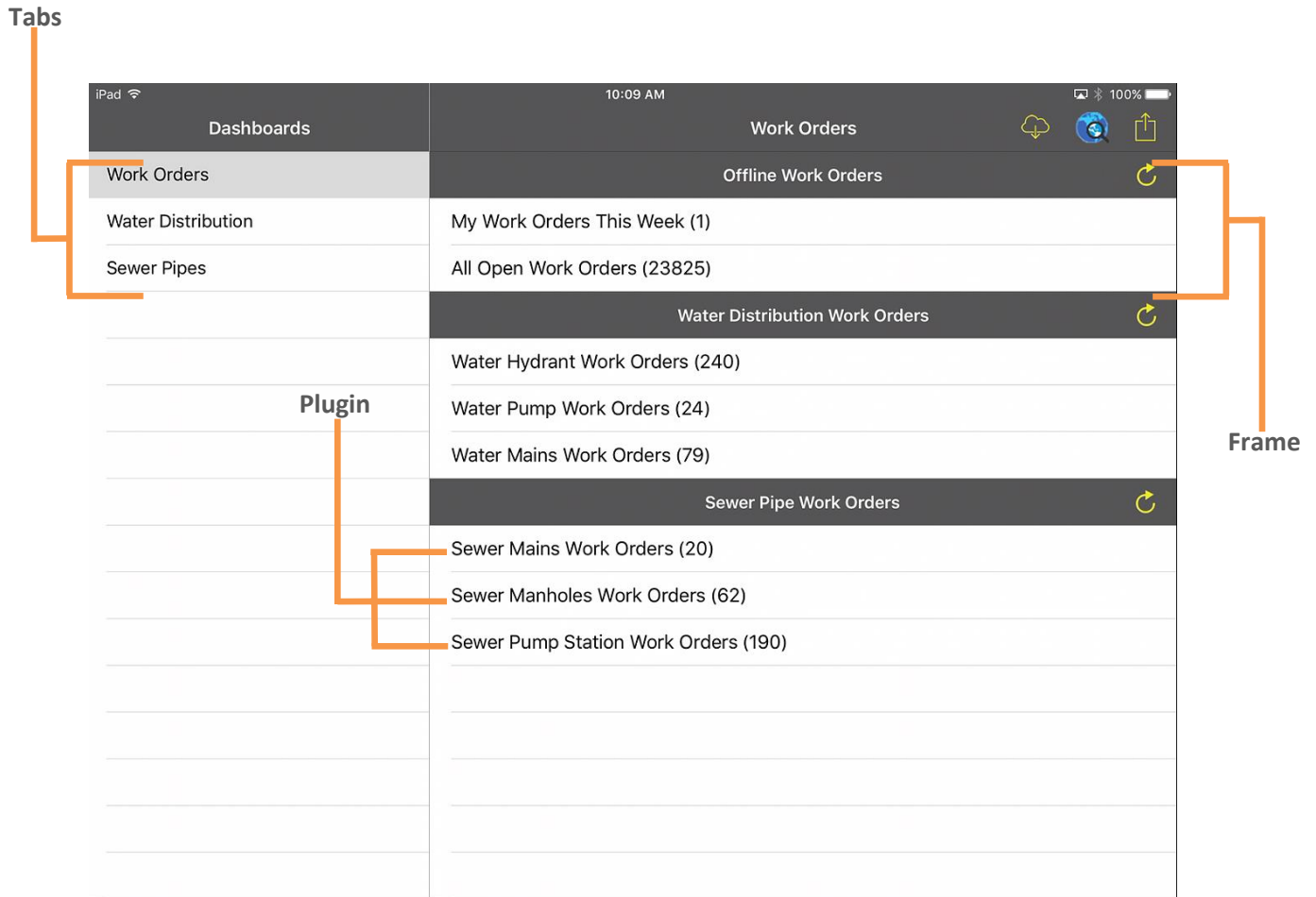
Table of Contents

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.

Tabs

Plugin

Frame

| Dashboards	Work Orders		
Work Orders	Offline Work Orders		
Water Distribution	My Work Orders This Week (1)		
Sewer Pipes	All Open Work Orders (23825)		
	Water Distribution Work Orders		
	Water Hydrant Work Orders (240)		
	Water Pump Work Orders (24)		
	Water Mains Work Orders (79)		
	Sewer Pipe Work Orders		
	Sewer Mains Work Orders (20)		
	Sewer Manholes Work Orders (62)		
	Sewer Pump Station Work Orders (190)		

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.
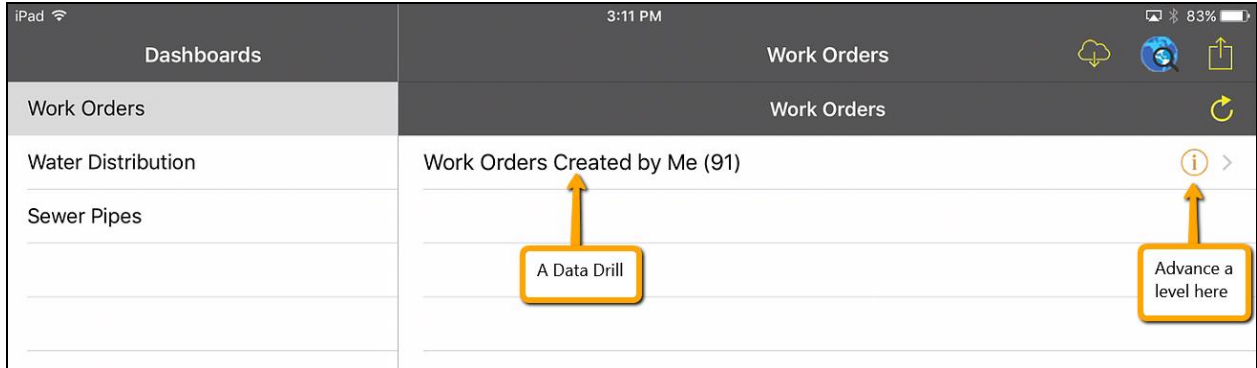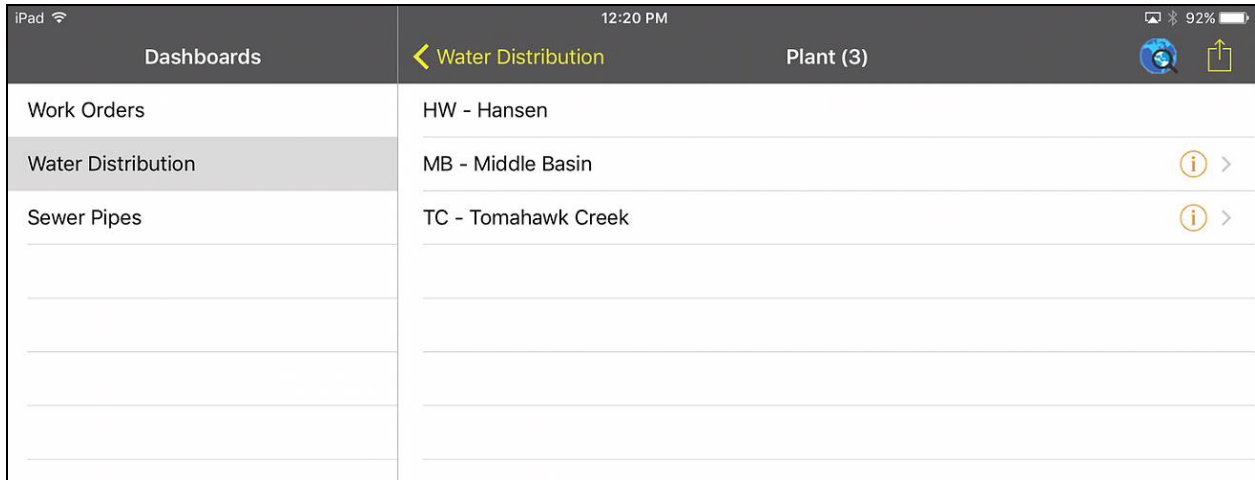

- The number in parentheses is a count of records

- Tap on the ⓘ button to advance to a new level of data

- Tap on a level of the drill to open the related record(s) in the related view.

The data drill then drills down to the next level which would look something like this:
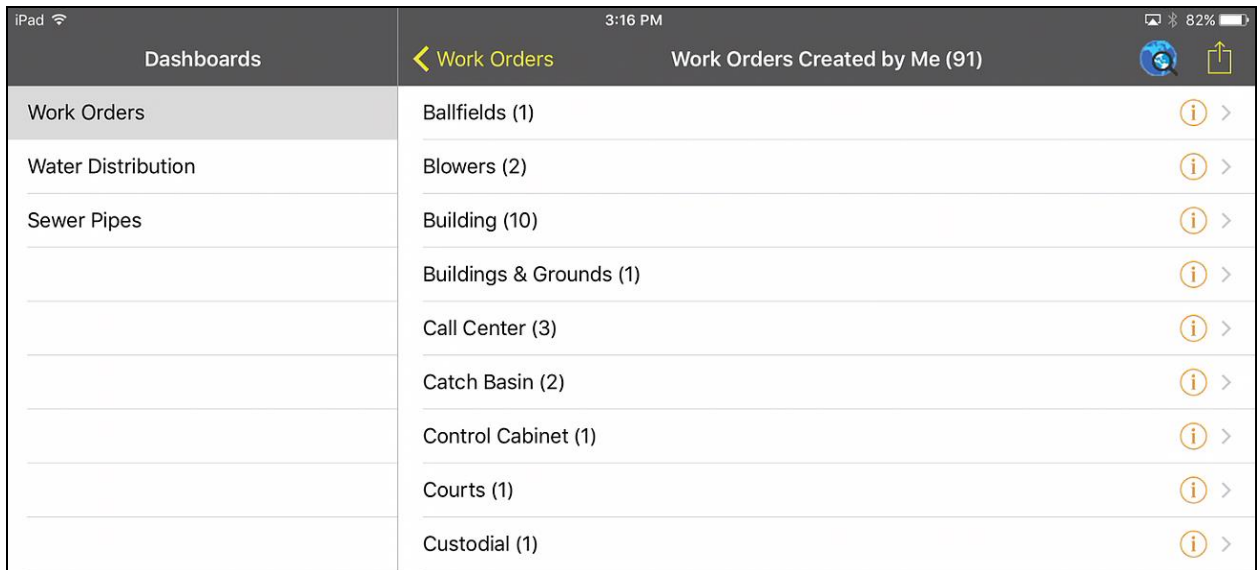
Asset Trees - These group assets together based on module and relationship. They work for Site, Building, Equipment, Plants, and Parks and they can be based on a filter. The tree will show a list of records for the selected module. Expanding one of those records will show child records related to that record.


- The number in parentheses is a count of records

- Tap on the (i) button to advance to a new 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 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 tablet.
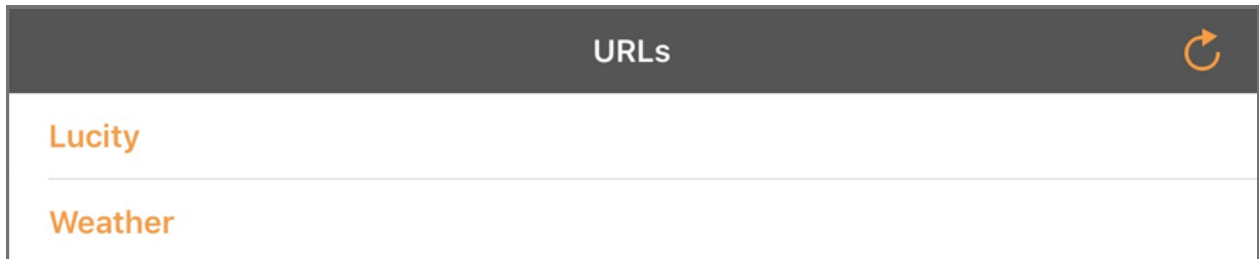
Time Summary – This plugin displays the current users recorded time. It displays today's time, yesterday's time, all time for the current pay period, and all time for the previous pay period. Time displayed is broken up between work order and timesheet entries.
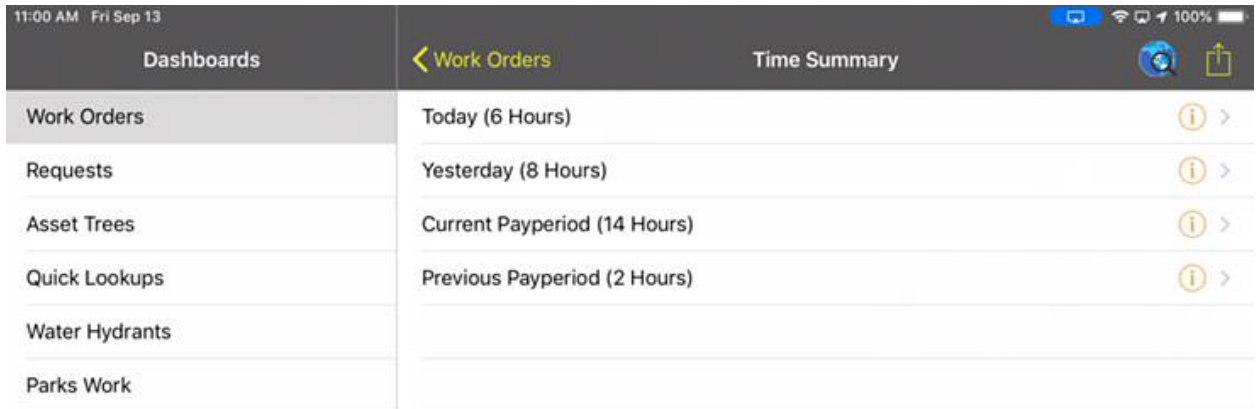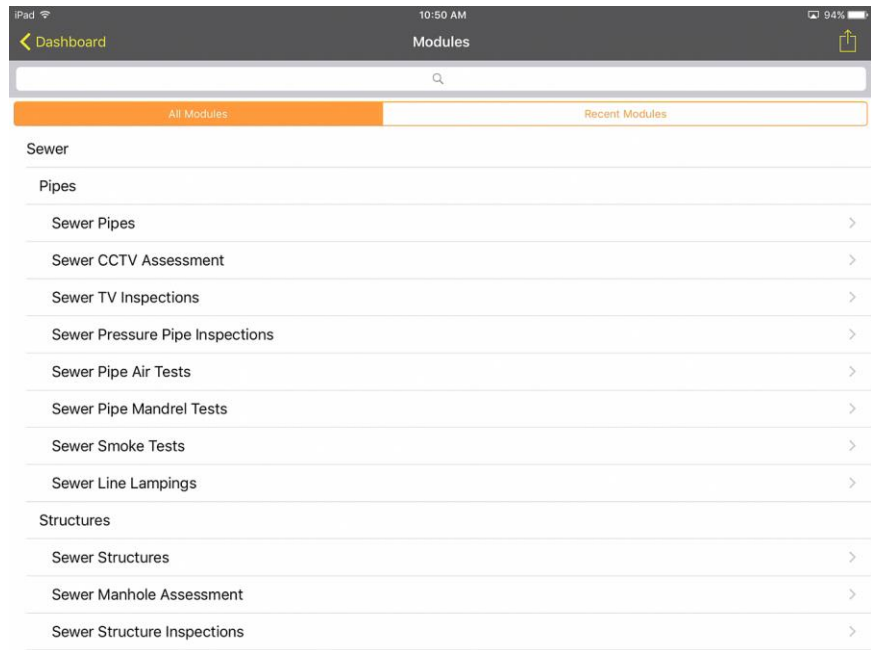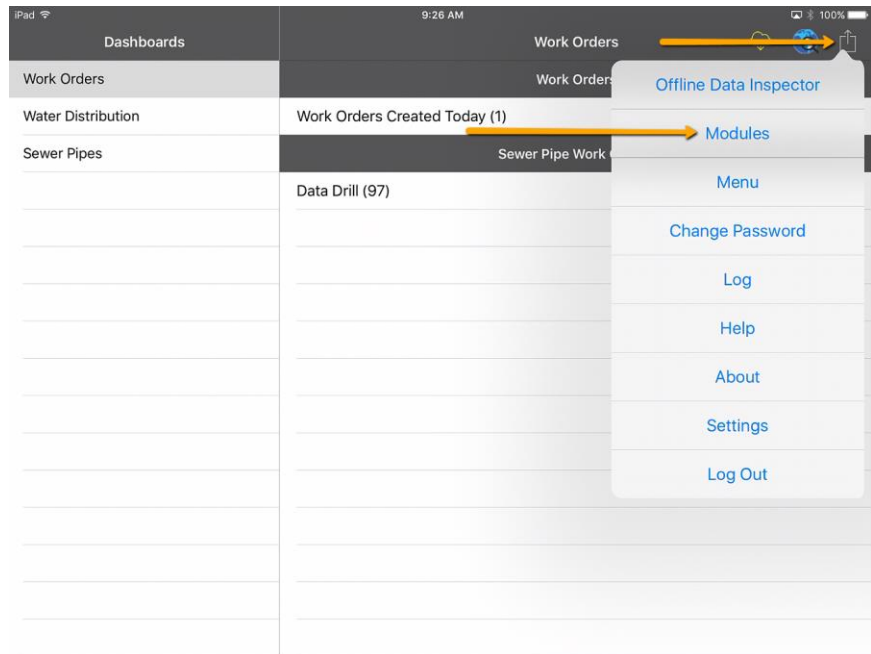

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Modules List

One of the options from the Dashboard menu is the Modules button. Tapping this button opens the modules list. This menu allows users to navigate through the Lucity modules list or select a module that they have opened recently.

- 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 field to search for a specific module

Menu

One of the options from the dashboard menu 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.
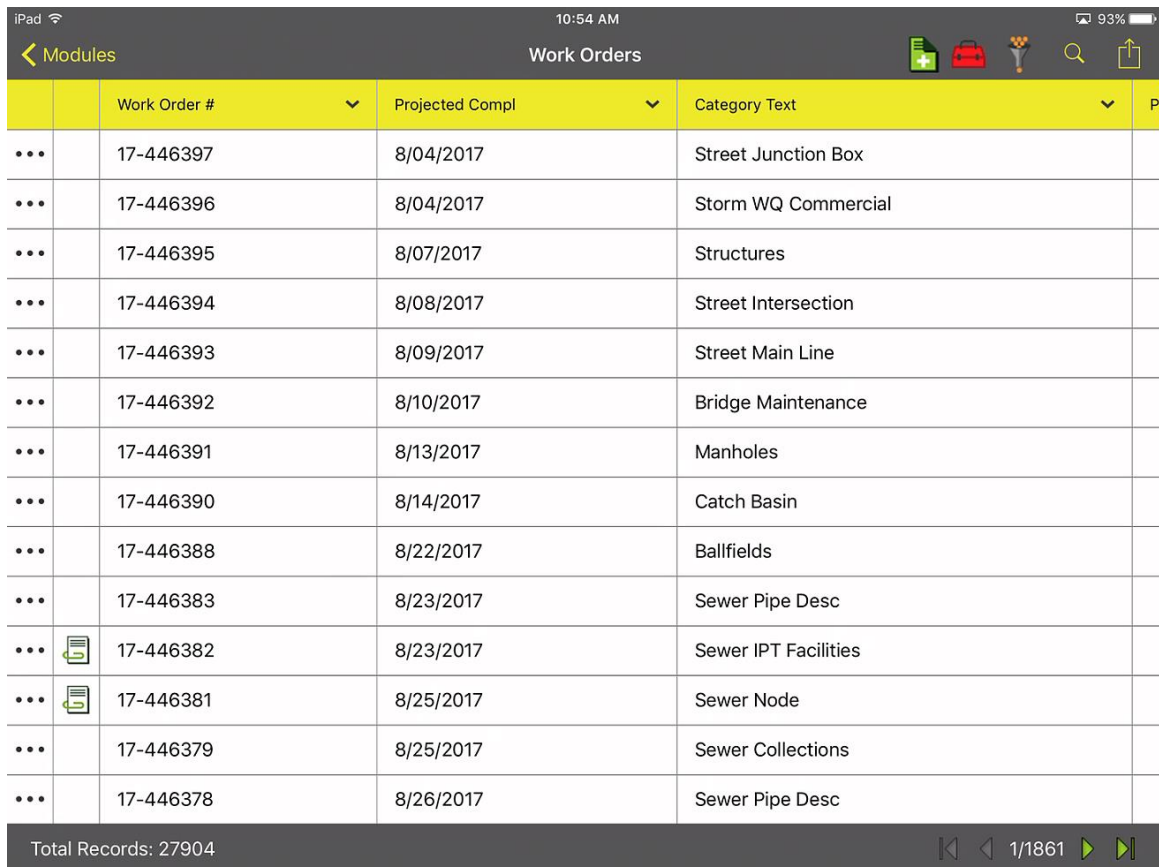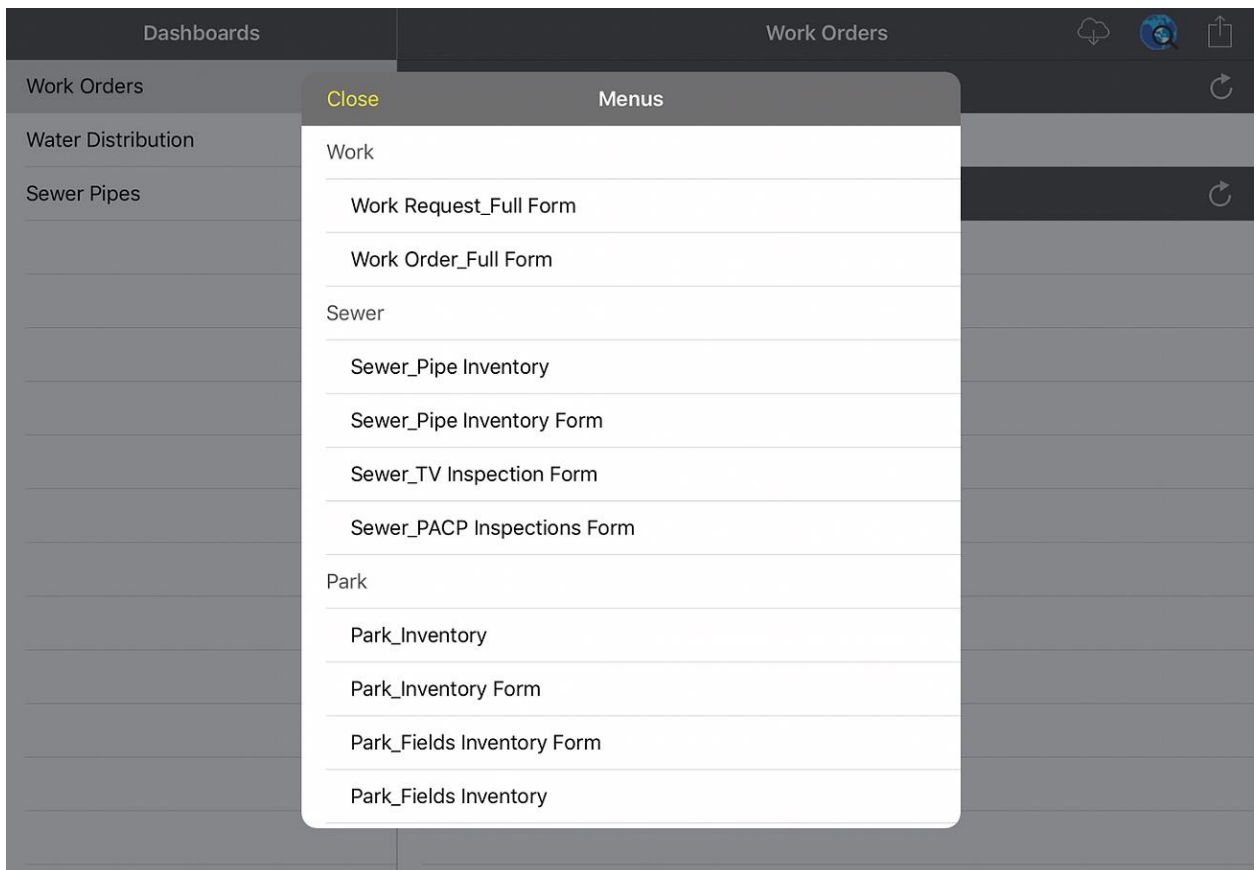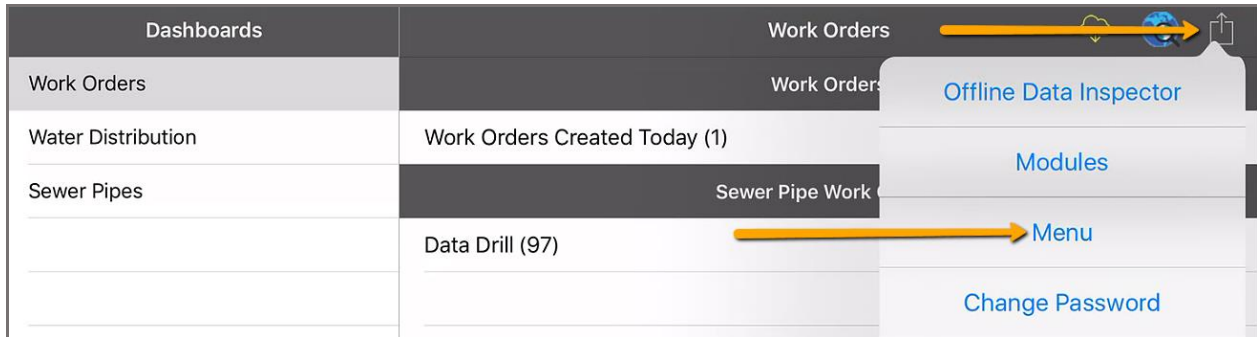

- Tap on a link name to open the View or Form.

Views

Views are lists of records that display general information about each record. They allow users to search for and select records for more detailed 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 all the records in the module. When a user taps on a record in that list it opens that record in a Form.

  - **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** – From either the parent view or the parent form, users can access Child Views by tapping on the icon with the three dots: ••• . Child records are attached to the main record and 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 three dots and selects Tasks from the list of child views to see all the tasks attached to the Work Order.

		Work Order #		Projected Compl		Category Text		P
•••		17-446397		8/04/2017		Street Junction Box		
•••		17-446396		8/04/2017		Storm WQ Commercial		
•••		17-446395		8/07/2017		Structures		
•••		17-446394		8/08/2017		Street Intersection		
•••		17-446393		8/09/2017		Street Main Line		
•••		17-446392		8/10/2017		Bridge Maintenance		
•••		17-446391		8/13/2017		Manholes		
•••		17-446390		8/14/2017		Catch Basin		
•••		17-446388		8/22/2017		Ballfields		
•••		17-446383		8/23/2017		Sewer Pipe Desc		
•••	🗒	17-446382		8/23/2017		Sewer IPT Facilities		
•••	🗒	17-446381		8/25/2017		Sewer Node		
•••		17-446379		8/25/2017		Sewer Collections		
•••		17-446378		8/26/2017		Sewer Pipe Desc		

Total Records: 27904   1/1861

- 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.

- 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. Swipe left to see the additional columns in the grid.

Alternate View

By default, views display the data for a given record in a single row. This often means that the user must swipe left to read the additional fields for a record. It is possible to display all a record's fields on the screen by enabling the Alternate View. To enable the Alternate View, from the dashboard tap on the dashboard menu and tap on settings, then toggle on "Use Alternate View" under "Grid View Settings".

View Toolbar Functions

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

	Title	The middle of the toolbar displays the name of the module.
	New Record	This creates a new record in the module.
	Refresh	To refresh from the view, pull down on the grid until it reads "Release to refresh…" Refresh is also available on the dashboard menu.
	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 By	This tool allows users to sort the records based on the values of one column/field. Available while in the default view (not alternate view).
	Sort By	This tool allows users to sort the records based on the values of one column/field. Available while in the alternate view.
	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.
	Find	This tool allows users to search for a string of characters in all fields.

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Selection Mode

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

In selection mode the selected records are highlighted in light gray with an orange checkmark on the left 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.

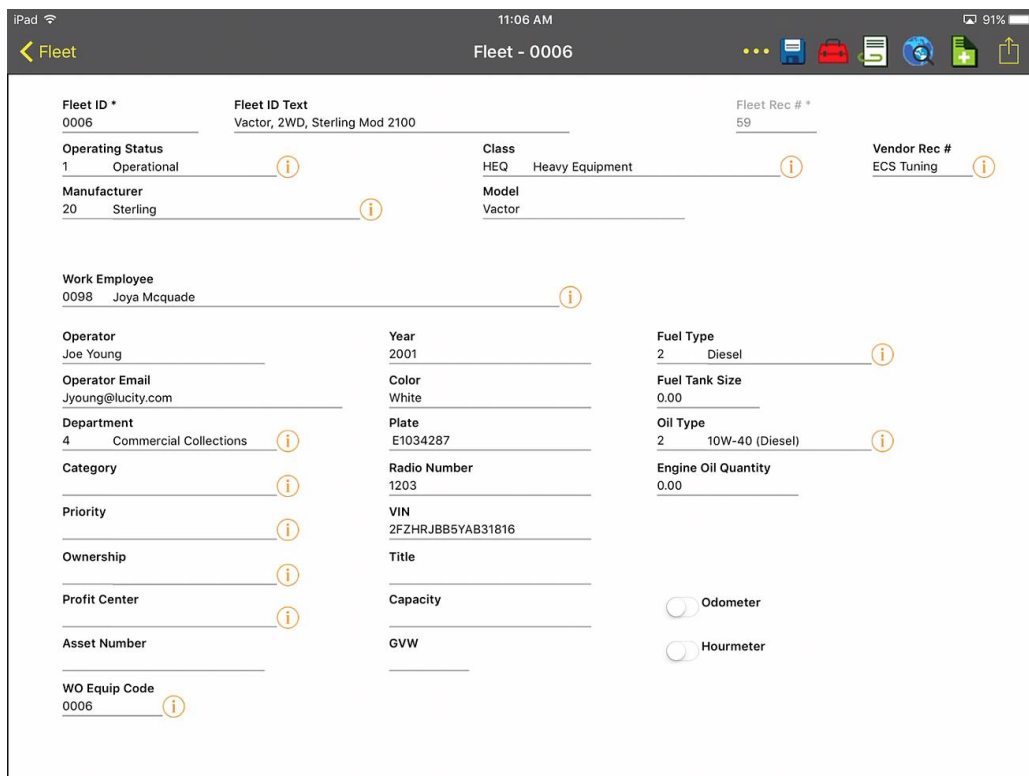|		
	Show In Map	On the Dashboard this button launches the map. In a module this button launches the map and zooms to the selected record(s).
	Documents	View and attach documents to the selected records. Will attach pictures and videos stored on the device.
	Delete Record	This button appears after entering Selection Mode. Tap it to delete the currently selected record.
	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.

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.

Total Records: 79	|◁ ◁ 1/6 ▷ ▷|

- 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. You can also move through the pages using a two-finger swipe on the grid.

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.

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. Addition buttons available are described below.

	Title	The center of the toolbar displays the name of the module and the ID of the currently opened record
•••	*Child Tabs*	Most modules have several sets of child records. Users can access views of these child records using the Child tabs. Child tabs can be accessed by tapping on the three dots and navigating within the Child Views pop-up.
‖‖‖	*Barcode*	This button allows you to use the camera as a scanner to input data into any field that allows input from the keyboard.
💾	*Save*	This saves the current record.

Navigating through Forms and Child Views

At the top left of any form or view there is a back arrow 〈. Tapping in this button will navigate back one level at a time, eventually arriving at the dashboard.

Fields and Popups

Colors and Symbols

Fields with an asterisk are required.

Supervisor *
0194   Alex Todd   ⓘ

Fields that are displayed in light gray are read-only.

Work Order #
17-446397

Fields that display in orange indicate that you cannot enter a value manually. Instead, tap on the field and use the

Category *
Z05_3G - Street Junction Box

alternate input method (picklist, date picker, time picker, etc.).

Account #

A field that is actively being edited displays an orange cursor.

Text Fields

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

Picklist Fields

Picklist Fields displays the code and type in one field. Tapping on the ⓘ button pops-up a picklist. The user can also manually enter the code by tapping on the left side of the field and using the on-screen keyboard.
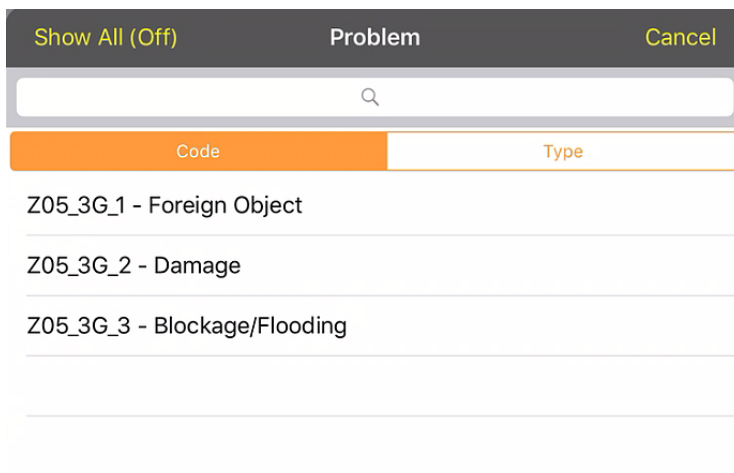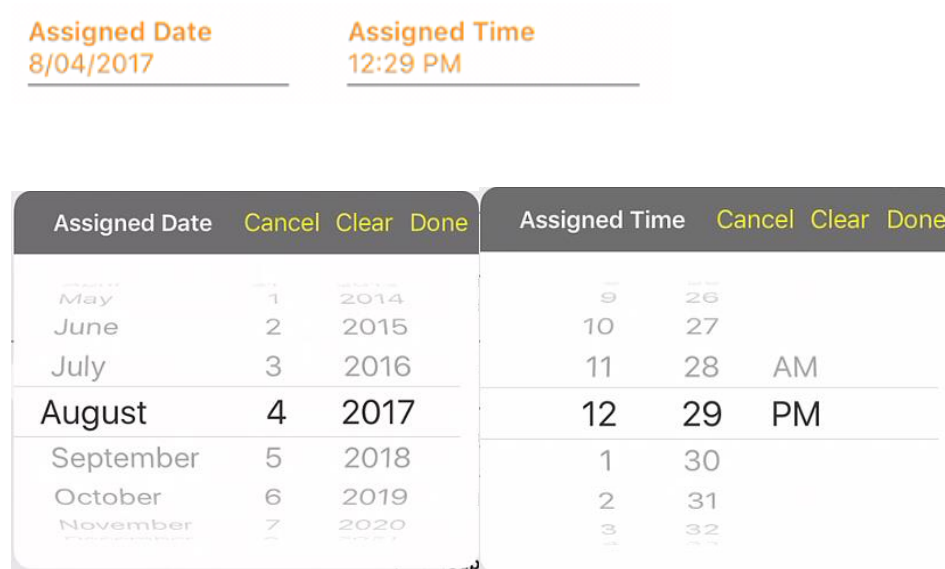

- **Selecting an Option** - Tap on an item in the picklist to select it.

- **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.

- **Searching the List** – Just below the title bar is a search field. Tap in the field and begin typing either numbers or text that you want to search against. The list will automatically be filtered based on what is typed.

- **Sorting** – Just below the search bar are two buttons that control how the list is sorted. Tap a button to switch between filtering based on Code and Type.

- **Cancelling** - Tap **Cancel** to close

the picklist without saving any changes.

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.

Assigned Date
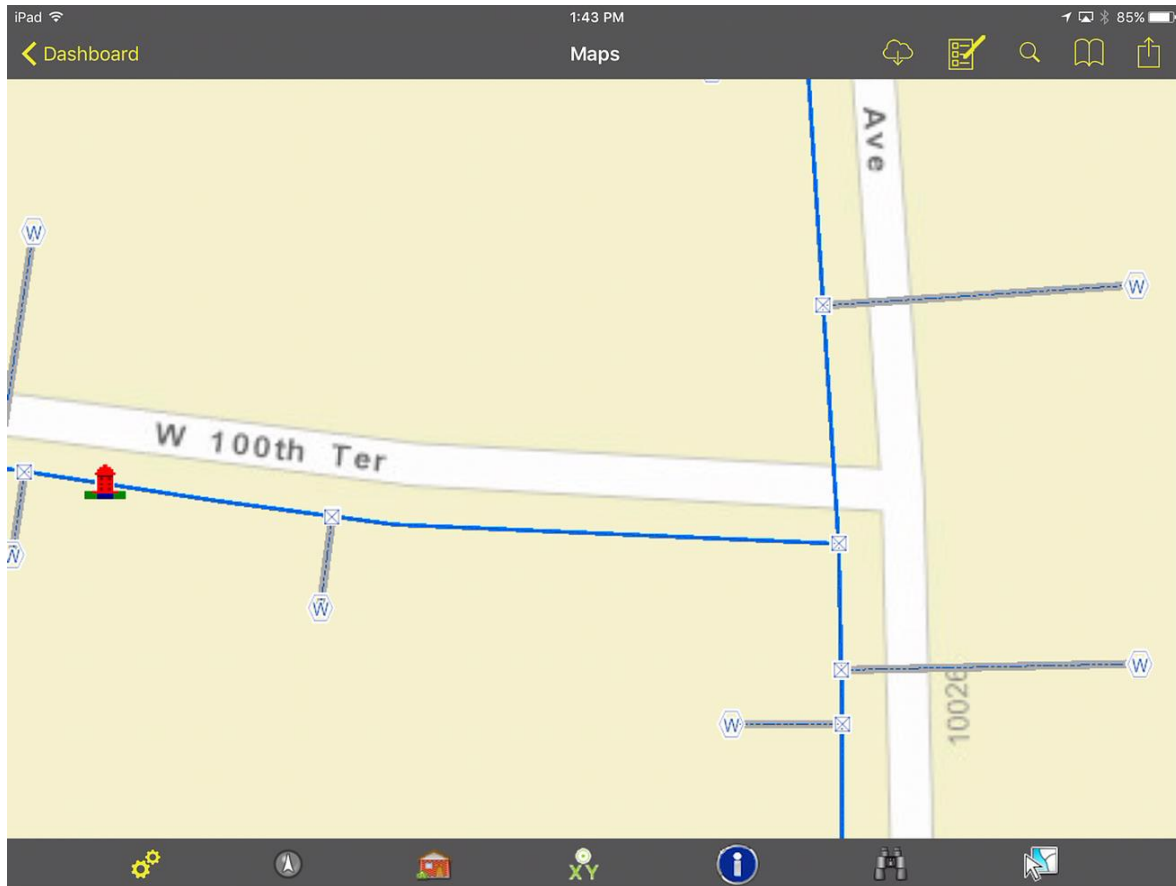8/04/2017

Assigned Time
12:29 PM

Assigned Date	Cancel	Clear	Done
May	1	2014	
June	2	2015	
July	3	2016	
August	4	2017	
September	5	2018	
October	6	2019	
November	7	2020	

Assigned Time	Cancel	Clear	Done
9	26	
10	27	
11	28	AM
12	29	PM
1	30	
2	31	
3	32	

Comment Fields

Comment Fields appear as boxes. Tap in the box to bring up the device's keyboard and begin typing. Dictate into text fields by tapping the microphone in the keyboard.

Comment From Request

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 assets in the map by tapping the button from a view (during selection mode) or from a form.

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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 quickly return to a location in the map.	

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 Options	Tap this button to open a list of available maps, map layers, base maps, and the legend.
	Clear Graphics	Found in the overflow menu. Clears all graphic layers out of the map.
	Go to Default Extent	Found in the overflow menu. Returns 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.
	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...