TRAINING GUIDE

Lucity Mobile

Lucity Mobile

The Lucity mobile app gives users the power of the Lucity tools while in the field. They can lookup asset information, review and create work orders, create inspections, and many more things. This manual covers some basic operations for creating and filling out work orders while in the field.

Contents

Finding Information

From the Dashboard

Look at your Dashboard. There will be several types of plugins. Asset Tree and Data Drill plugins provide the ability to view your data sorted into different groups. Asset Trees sort facility and equipment data based on relationships. Data Drills sort any kind of data based on common attributes.

This example is a data drill that has all open work orders grouped by Supervisor. Then under the supervisor they are grouped by main task. You can tap on any level of the data drill to open that group of data in a view of those records.

Through the Modules Menu

From the Dashboard click the **MODULES** button on the menu. The following pop-up will appear:

On the left side of the pop-up is a list of all the Lucity modules.

- Tap the + and ━ icons to expand or collapse a level of the menu.
- Tap on a module name to open that Module View.

On the right is a list of the modules that you have opened recently.

- This list is sorted by order of use. The more recently a module was opened, the higher it will be in the list.
- Tap a module name in the Recent Modules list to open that module.

After selecting a module a view of all the records in that module will appear.
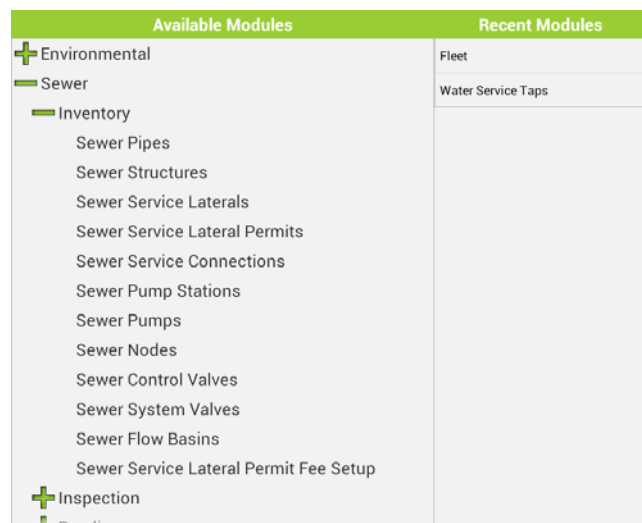
Viewing Information

Records in Lucity are displayed in two different ways. Groups of records are displayed in Views while individual records are displayed on forms.

Views

Views display lists of records. These lists provide summary information about each record for identification. Within Views users can load a filter, sort, and search for records. They can also add records, delete records and display information in the map.

- Swipe up to scroll through the View

- Use the ⏮◀ ▶⏭ buttons to the bottom right to navigate to more pages of records within the view.

- Tap a record in the list to open up that record in a Form.

Filter Records

1. Tap the 🏮 button. The following pop-up will appear:

2. This is a list of all the current user's saved filters.

3. If the filter was created by somebody else tap the *Show All* Checkbox. The pop-up will switch to show all saved filters.

4. Tap on a filter to load it.

5. Tap on *Clear Filter* to remove all filters from the module.

Sort Records

1. Tap the A-Z button. The following pop-up will appear:

2. The options in the list are fields that are displayed for each record in the view.

3. Tap a field in the list to base the sort on.

4. Tap the Sort Z-A or Sort A-Z buttons at the bottom to sort the records.

Clear a Sort

1. To clear a sort tap the A-Z button again.

2. Tap the Clear Sort button that now appears at the bottom of the pop-up.

Sort
Choose a field:
Assigned Crew Text ○
Category Text ○
Created By ○
End Date ○
Lead Worker Text ○
Main Task Text ○
Problem Text ○
Project Text ○
Reason Text ○
Start Date ○
Status ○
Status Date ○
Sort Z-A	Sort A-Z

Search for a Record

1. Tap the 🔍 button for a field to type in.

2. Enter the Common ID for the record you are searching for.

Add a Record

1. Tap the 📗 button.

2. A blank form will open up.

3. Fill out the desired fields.

4. Tap the 💾 button to save the record.

Show in Map

1. Long tap on a record in the list.

2. The view will enter *Selection Mode* and the record will be selected.

3. Tap on any other desired records in the list.

4. Tap the 🌐 button to open the map. All the selected records will be highlighted in the map.

Forms

Forms display detailed information about a record and provide you with a way to edit that information. Forms also give you a way to look at information related to the record.

- Swipe up to scroll through the form.
- Tap on a field in the view to edit that field

Accessing Related Records

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.
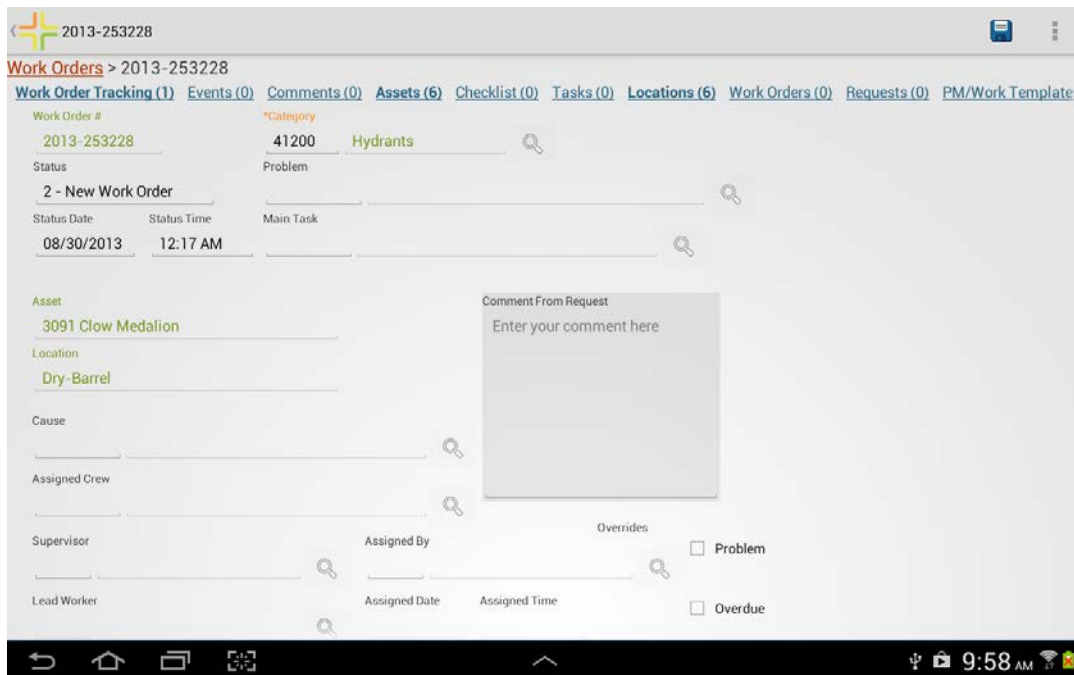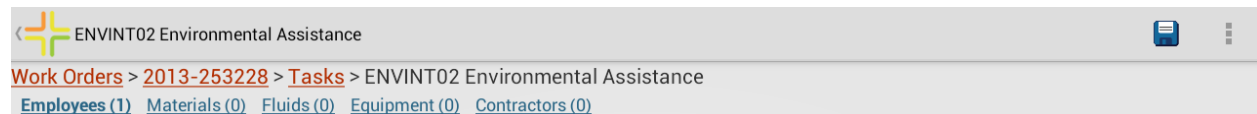

Red Links

The first set of links is red and helps users navigate back through a module. As they open up 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 record 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 records.

Example

In the image below tapping on the Employees (1) link would open a view of all the employee records that are attached to the EVNINT02 task. There is only 1 employee currently attached.
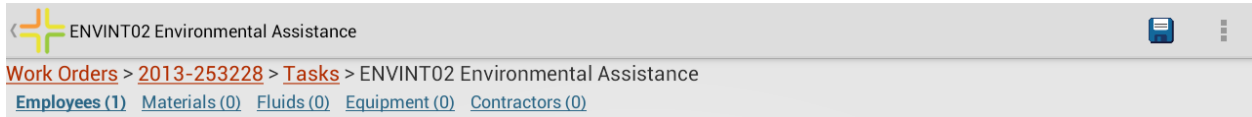
Fields and Field Popups

Within a form there are several types of fields. Each of these fields act differently and have different properties.

Colors
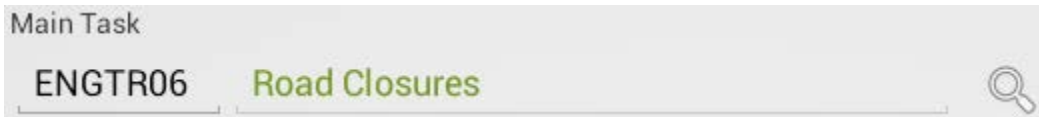
- Fields that are labeled in Orange are required.
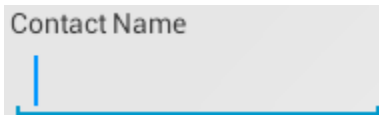
- Fields that are labeled in Green are read-only.

- Text within a field is text that was entered by the system. These fields are read-only as well.
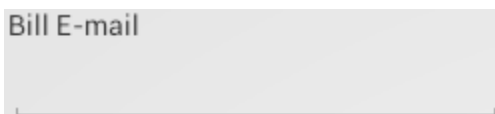
- A field that is actively being edited is underlined in Blue.

Text or Number Field

Most 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.

Lucity Mobile

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.

Status

2 - New Work Order

- **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.

Main Task

ENGTR06   Road Closures   🔍

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

- *Clearing the Field* - Tap Clear to remove all values from the field.

- *Filtering the List* - In the top left corner of the pop-up is a filter field. Tap in the field and begin typing in 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 on one of these buttons to change how the list is sorted.

Problem

Sort By ⦿ Code ○ Type

Clear
BS - BS - Miscellaneous
BSCON - Blue Stake Inquiry - Contractor
BSENG - Blue Stake Inquiry - Engineering
BSOTH - Blue Stake Inquiry - Other
BSRES - Blue Stake Inquiry - Residential
CSINFOADM - Info - Administrative's
CSINFOINT - Info - Internal Customer
CSINFOMSC - Info - Miscellaneous

- *Closing the Pop-up* - Tap the ↰ button 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.

Assigned Date   Assigned Time

03/06/2013   8:33 AM

Tue, Mar 5, 2013
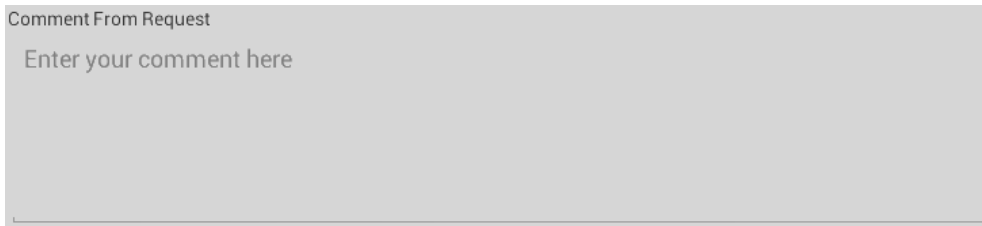
March 2013

	S	M	T	W	T	F	S
Feb 04 2012	9	24	25	26	27	28	1	2
Mar 05 2013	10	3	4	5	6	7	8	9
	11	10	11	12	13	14	15	16
Apr 06 2014	12	17	18	19	20	21	22	23
	13	24	25	26	27	28	29	30
	14	31	1	2	3	4	5	6

Cancel   Set

Comment Fields

Comment Fields appear as boxes. Tap in the box to bring up the devices keyboard and begin typing.

Comment From Request

Enter your comment here

Work Flow Examples

Here are several examples of how facility maintenance field users could use Lucity Mobile to accomplish common tasks.

Creating a New Work Order

1. From the tablet dashboard screen tap on the link for My New Work Orders
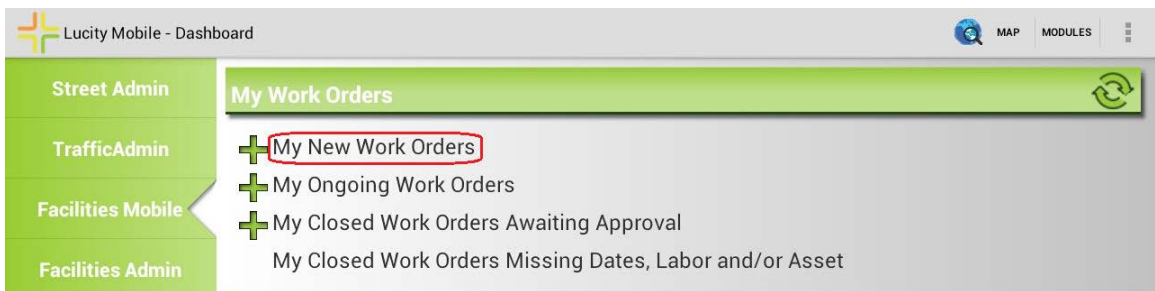
- o   This will open a view of all new work orders currently assigned to you.
- o   In the top right of the screen there will be a green piece of paper with a plus sign. Tap this button to create a new work order.
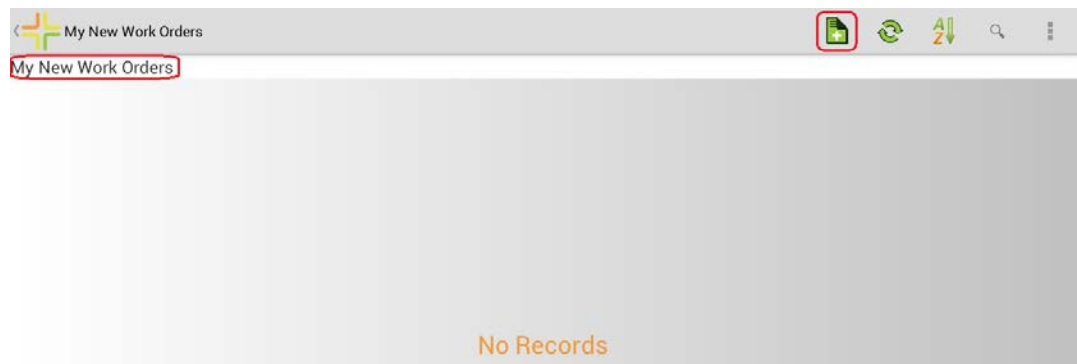
Notes:_____

_____

_____

_____

o   A new Work Order Form will open with empty fields

o   Fill out all appropriate fields (note the Category field does not need to be changed as it will default to Buildings on Save)

- Problem
- Supervisor
- Assigned To
- Main Task

o   The status field will be updated once the work order has been completed and can be left as New Work Order at this time.

o   The Work Order # will populate automatically on Save

o   The Comments from Request and Comments to Crew are read only fields and will only be populated if the work order is generated from a Request or scheduled PM.

o   Building ID, Building Name, and Address fields are read only and will populate once the Asset (Building) is identified.

o   Save the record with the disc button in the top right of the screen.

2. Once the Save is complete you will see the blue links for the children records show up below the red links at the top of the screen.

Lucity Mobile

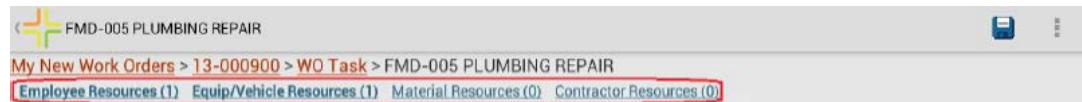3. Begin with the WO Task link by taping the link.

- o This will open a view of all tasks assigned to this work order. This should be the main task that you have selected in the previous screen.

- o Tap the task in the grid and fill out the Date and Start Time and Save. Begin the work and once completed (finished for day or duration of time) come back to tablet to complete final entry. *Work can be completed prior to starting new work order.

- o Navigate back to the Work Order>WO Tasks link if not left there during work.
- o Fill out the End Time of the task and Save.
  - ▪ Once the Save is complete you will see the blue links for the children records below the red links at the top of the screen.

  - ▪ Click on the Employee Resources link.

    - • This will open a view of all employees assigned to this work order.
    - • Tap the employee in the list you wish to add time to. This will open a form to enter the regular and overtime hours
    - • *If the employee is not listed click the Add Record button in the top right of the screen to see the same form.

- Also included will be the Date (read only) and times. If the times are different than the task times entered previously you may manually enter the correct times.

  - Return to the Task Form by click the Task Name along the red links at the top of the screen.

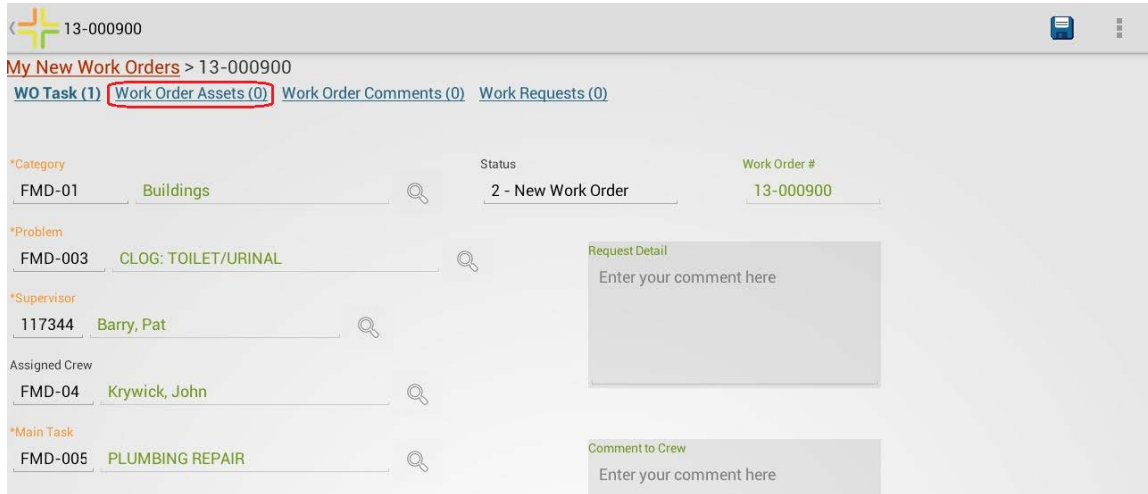

  - Repeat the same process for Equip/Vehicle Resources, Materials (if needed) and Contractors (if needed) by clicking the blue links from the Task Form.

  o Return to the main Work Order Form by clicking the Work Order # on the red links at the top of the screen.

4. From the main Work Order Form you can now tap the Work Order Asset link.

  o This will open a blank view if no asset is currently attached and read No Records.

- o Tap the Add Record button in the top left of the screen. This will open up the Asset Form.

- ▪ Here tap the magnifying glass icon to bring up a list of all Buildings.
- ▪ Scroll through or filter the list and tap on the Building where the work is occurring.
- ▪ Note there are two pages of Buildings so you may need to navigate to page 2 to see all records.
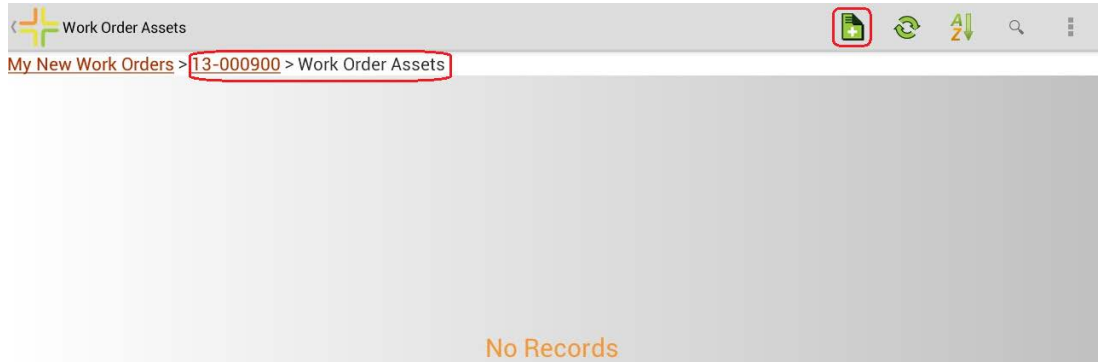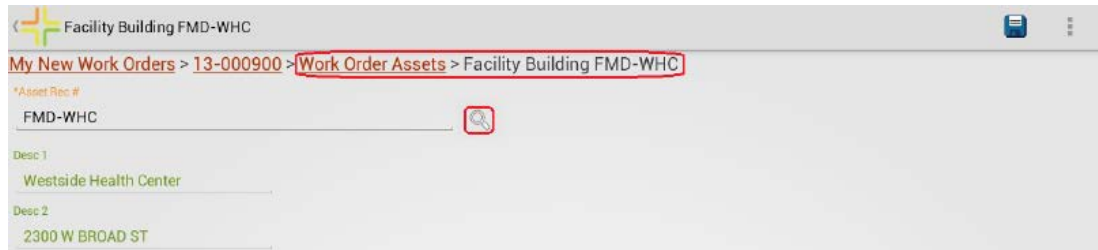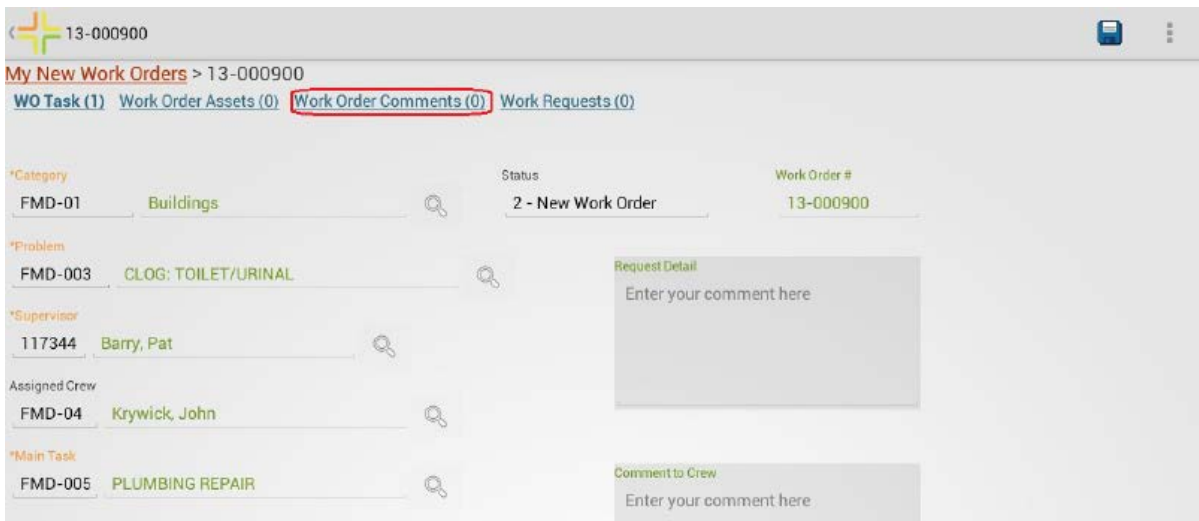- ▪ Once the Building is selected tap the Save button and you will see the Building Name and Address populate.
- o Return to the main Work Order Form by clicking the Work Order # on the red links at the top of the screen.
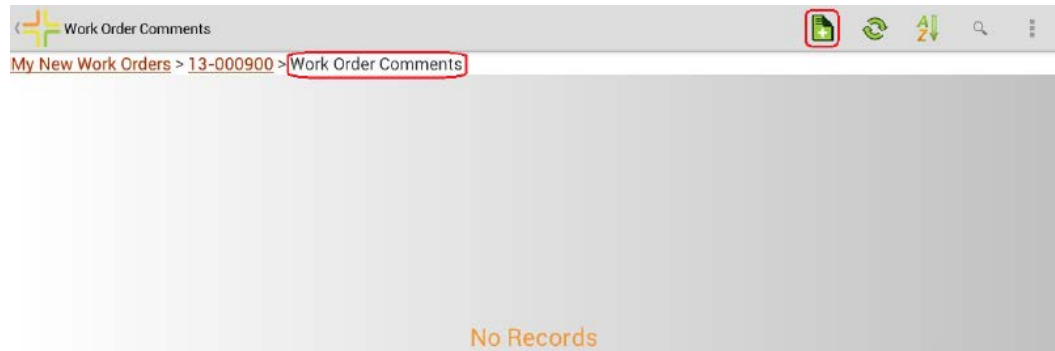

5. From the main Work Order Form you can now tap the Work Order Comments link.

Notes:_____

_____

_____

_____

_____

o   This will open a blank view if no comments currently exist and read No Records.

o   Tap the Add Record button in the top left of the screen. This will open up the
   Comments Form.

- Tap in the Comments box to add your comments.
- The keyboard will automatically come up once you tap in the box.
- Once the comment is completed tap the Save button.

o   Return to the main Work Order Form by clicking the Work Order # on the red links at
   the top of the screen.

6. Finally update the Status field to indicate where the work order is, Closed in Field (if
    complete), On-Going (if work still needs to be done), or Cancelled in Field (if work order was
   invalid).
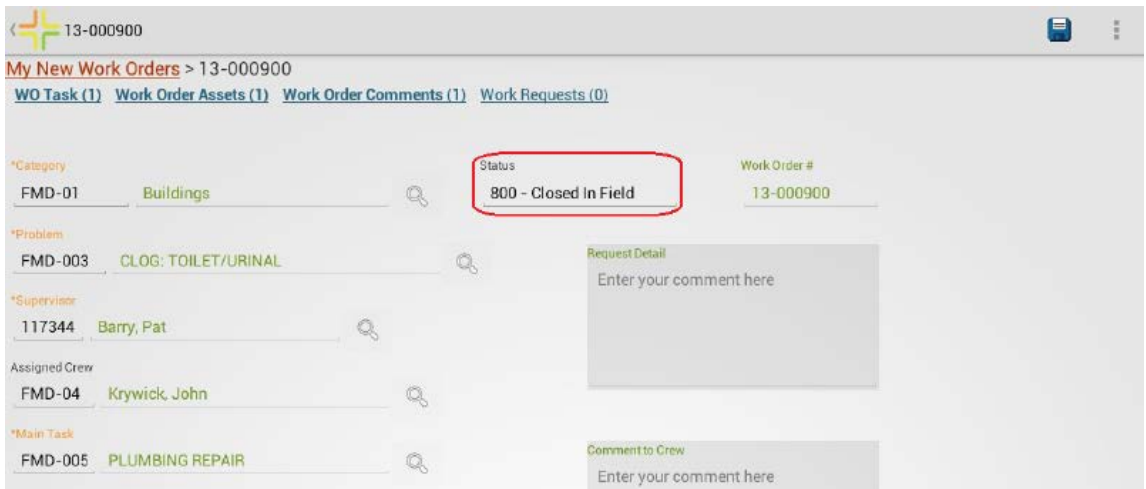
7. Save the record and the data entry is complete.

Lucity Mobile

Navigate to and Update an Ongoing Work Order

1. From the tablet dashboard screen tap on the link for My Ongoing Work Orders
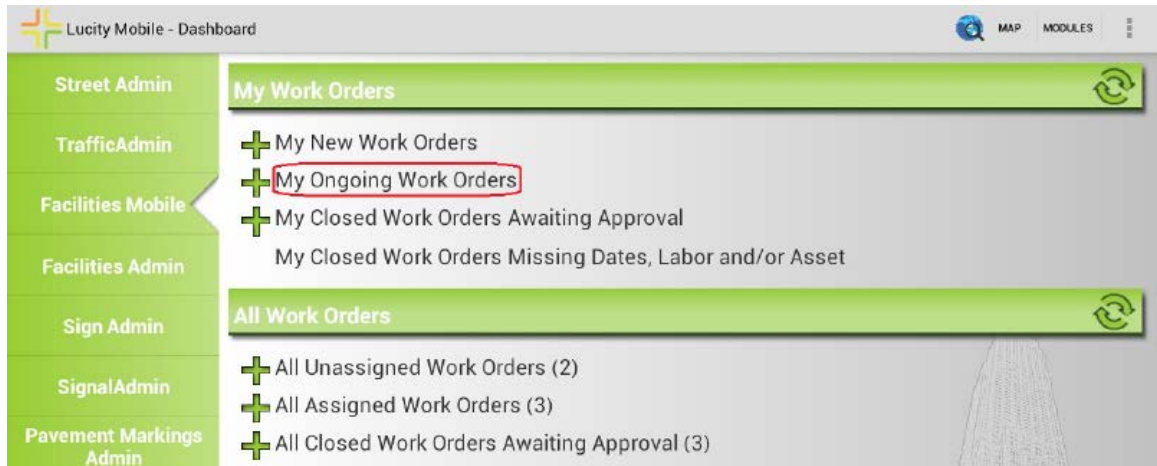
- This will open a view of all ongoing work orders currently assigned to you.
- Find the work order in the list you are working on and tap it to open up the main Work Order Form.
- No updates need to be made to this screen.

2. At the top you will see the blue links for the children records below the red links.
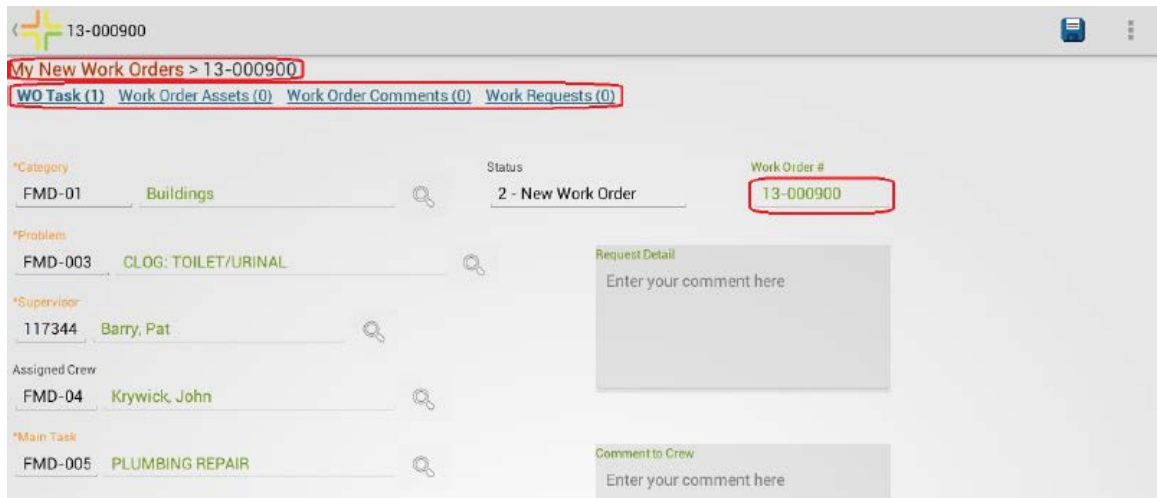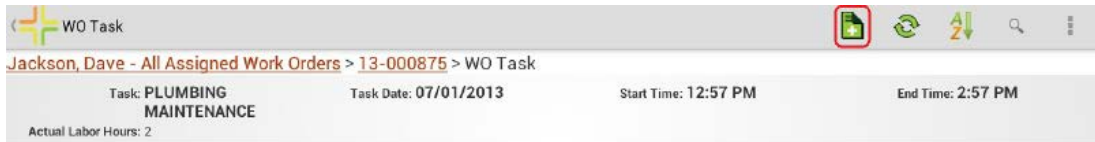

3. Begin with the WO Task link by taping the blue link.

- This will open a view of all tasks assigned to this work order. This should show a list of task from previous days (likely the same task repeated).
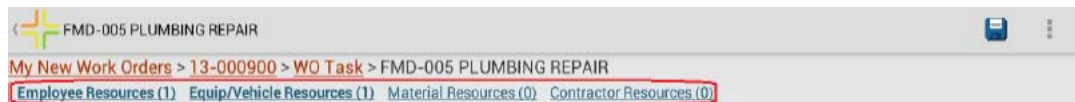
- Add a new task by clicking the Add Records button in the top right of the screen.

- Fill out the Date and Start Time and Save. Begin the work and once completed (finished for day or duration of time) come back to tablet to complete final entry. *Work can be completed prior to filling out work order.

- Navigate back to the Work Order>WO Tasks link if not left there during work.

- Fill out the End Time of the task and Save.

  o Once the Save is complete you will see the blue links for the children records below the red links at the top of the screen.

  o Click on the Employee Resources link.

    ▪ This will open a view of all employees assigned to this work order.

    ▪ Tap the employee in the list you wish to add time to. This will open a form to enter the regular and overtime hours. *If the employee is not listed click the Add Record button in the top right of the screen to see the same form.

    ▪ Also included will be the Date (read only) and times. If the times are different than the task times entered previously you may manually enter the correct times.

  o Return to the Task Form by click the Task Name along the red links at the top of the screen.
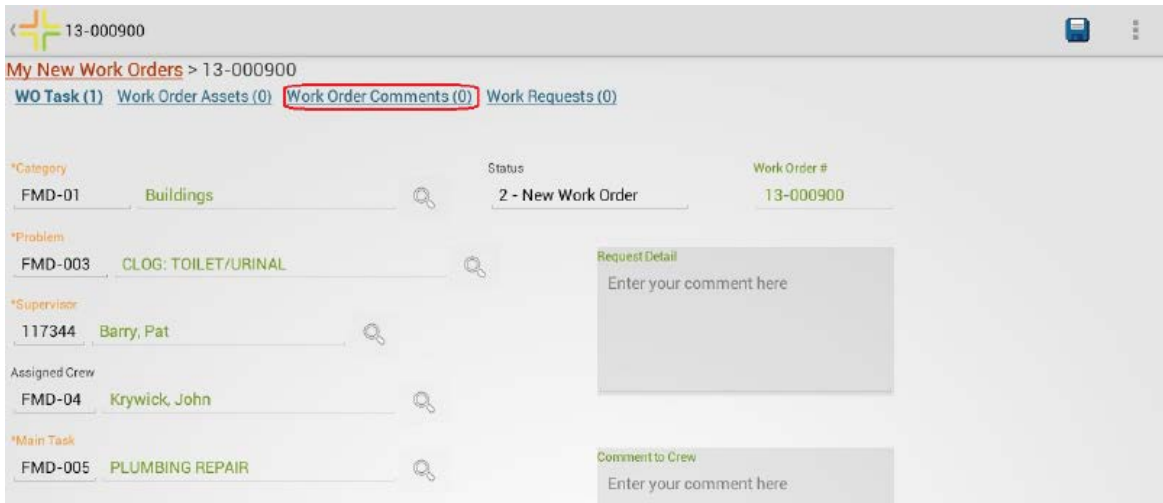
Lucity Mobile

- o Repeat the same process for Equip/Vehicle Resources, Materials (if needed) and Contractors (if needed) by clicking the blue links from the Task Form.

- Return to the main Work Order Form by clicking the Work Order # on the red links at the top of the screen.

4. From the main Work Order Form you can now tap the Work Order Comments link.

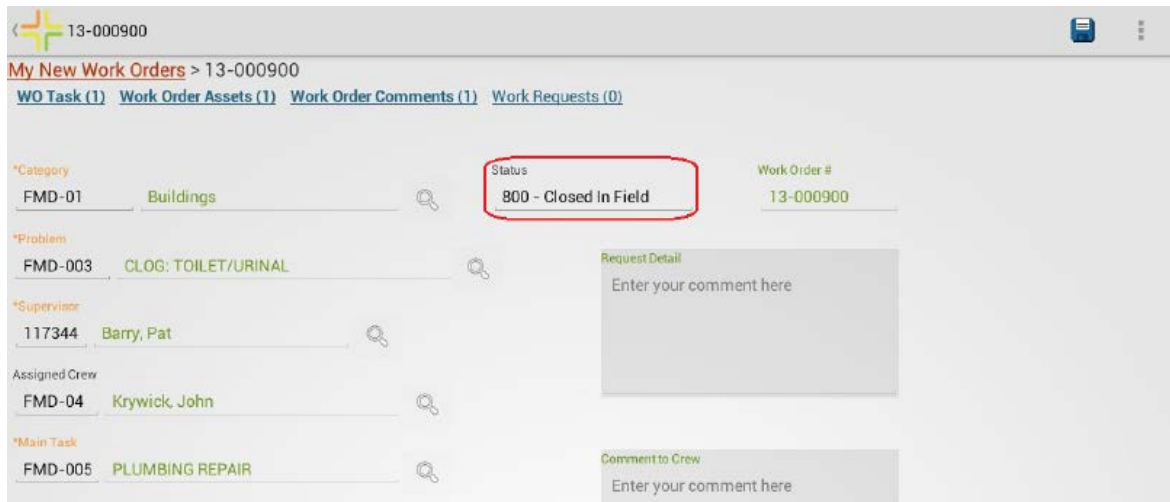- This will open a blank view if no comments currently exist and read No Records.

Notes:_____

_____

_____

_____

_____

Lucity Mobile

- Tap the Add Record button in the top left of the screen. This will open up the Comments Form.

  - o Tap in the Comments box to add your comments.
  - o The keyboard will automatically come up once you tap in the box.
  - o Once the comment is completed tap the Save button.

- Return to the main Work Order Form by clicking the Work Order # on the red links at the top of the screen.

5. Finally update the Status field to indicate where the work order is, Closed in Field (if complete), On-Going (if work still needs to be done), or Cancelled in Field (if work order was invalid).

6. Finally update the Status field to indicate where the work order is, Closed in Field (if complete) or leave as On-Going (if work still needs to be done).

7. Save the record and the data entry is complete.

Notes:_____

_____

_____

_____