



TRAINING GUIDE

# Lucity Unleashed

Overview of our mobile offerings



# Lucity Unleashed – Overview of our mobile offerings

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Lucity is no longer tethered by the bonds of power cords. This manual will provide a basic overview of the Lucity Mobile Work and Lucity Mobile apps.

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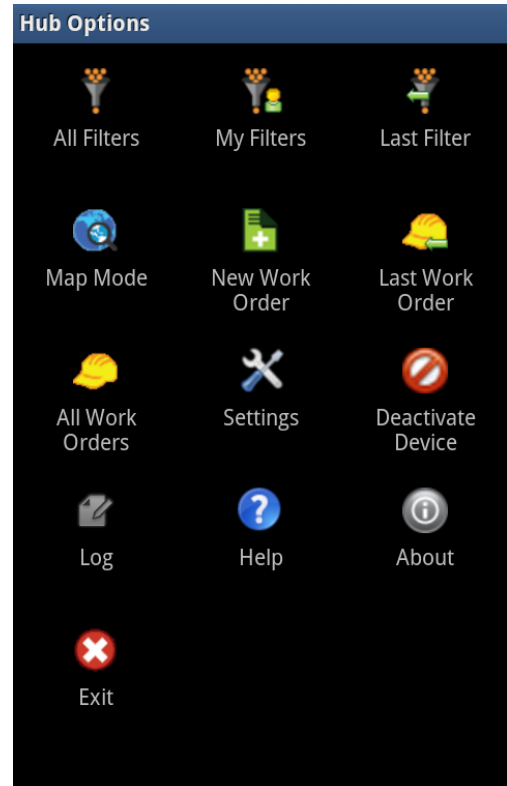
## Lucy Mobile Work (Phone)

Lucy Mobile Work allows users to create or access work orders from anywhere. It allows them to quickly lookup a work order; fill out new information, and save their changes. They can also create or view work orders in a map.

### Hub

The Hub is the center of Lucy Mobile. It provides a quick way to jump to any area of the application and is the first thing users see when they login.

-  **Filters** - Loads a list of all work order filters
-  **My Filters** - Loads a list of all work order filters created by the current users
-  **Last Filter** - Loads the last work order filter used by the current user on the device.
-  **Map Mode** - Loads the Lucy Map.
-  **New Work Order** - Creates a new work order.
-  **Last Work Order** - Opens the Work Order Form using the last work order viewed by this user.
-  **All Work Orders** - Opens the Work Order view with all records loaded.
-  **Settings** - Opens the program settings.
-  **Deactivate Device** - Deactivates Lucy Mobile for this device's currently logged in user.
-  **Log** - Provides a view of log entries made by the application.
-  **Help** - Links to web help for the device.
-  **About** - Provides information about the application
-  **Exit** - Closes Lucy Work.



### Settings

There are several settings that provide users control over how the app works for them.


**Select Modules** - Gives control over what children views are available in the Work Order forms. After tapping on the setting check/uncheck the boxes to change which views/forms will be available to see.


**Add Additional Fields** - Gives the ability to add more fields to the Work Order forms. Upon selecting this setting a list of all the different forms will appear. Select a form and a list of all the fields that are available for that form will appear. Tap on an item in the list to check it and add it to the form. Upon completion hit the back button and save changes. The fields will be added to the bottom of the selected form in alphabetical order.

**Page Size** - The number of records that show up in a view.

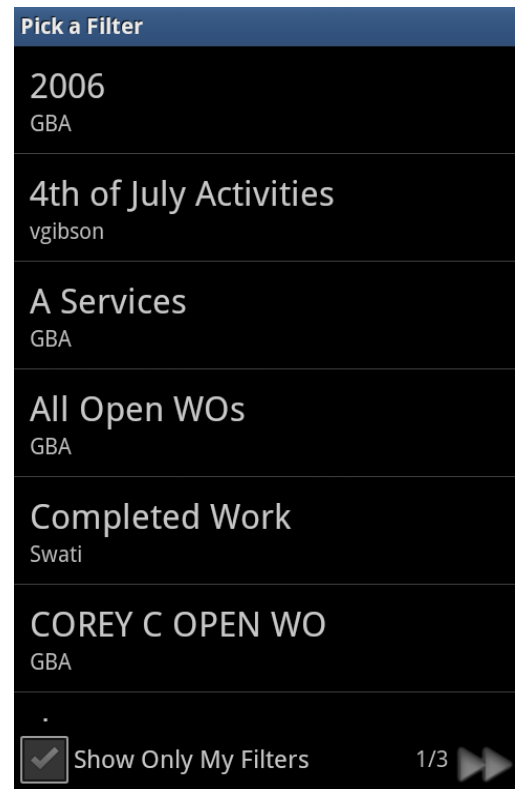
## Filters

From the Hub the Filters and My Filters buttons open the Filter View. This screen contains a list of Work Order filters.

 **My Filters** - At the bottom left of the screen is the "Show Only My Filters" checkbox. Tap this box to view only the current user's filters. It is checked automatically if the My Filters button was selected in the Hub.

 **Navigation** - The bottom right corner of the screen displays how many pages of filters there are. If there is more than one page navigation arrows will appear. The number of records on a page is set using the page size setting.

**Selecting a Filter** - Tap on a filter in the list to select that filter. It will automatically open the Work Order View with that filtered set of work orders loaded.



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## Navigation

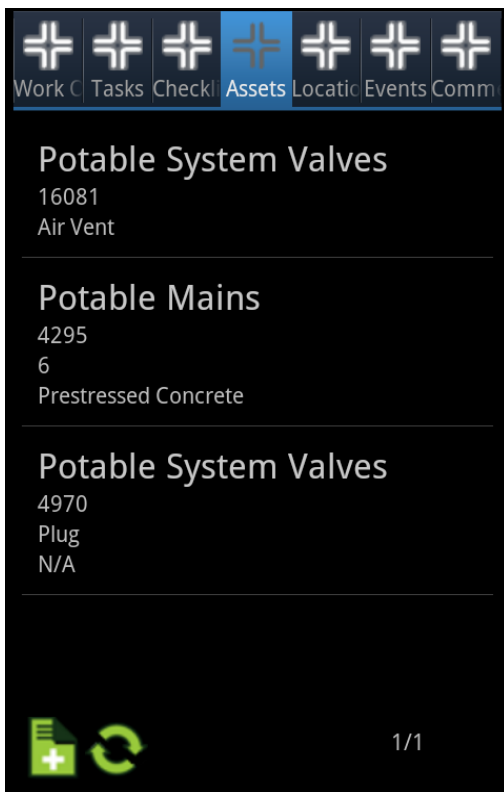
Mobile work is built around a collection of Views and Forms.

**Views** - These are lists of a type of record. A view of Work Orders is a list of work orders. Tapping on a record in a view opens that record in a form. Some views are built into forms and display lists of records related to the record on the form.

**Forms** - These display detailed information about a record. They also allow users to edit information about the record. Forms have tabs along the top that display views attached to the form. These views display lists of child records related to the record on the form.

*NOTE: These views and forms are hard-coded and are NOT based on the Lucity Web setup. If you are looking for this functionality look at Lucity Mobile (tablet app)*

### View of Asset Records




### Work Order Form



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## Add / Edit

**Add Records** - Within a view tap the Add Record button  to create a new record of that type. A blank form will open up allowing the user to update it.

**Delete Records** - Within a view long tap on a record. A prompt will appear asking if you want to delete the record.

**Edit Records** - Within a view tap on a record. The record will open in a form. Tap in a field for a popup to help fill the field out

- Text/Number - The devices keyboard will appear and users can type in a value.
- Picklists - A pop-up will appear that allows users to search for a value manually, or by typing in the desired value. Selecting the value from the list will fill out the field.
- Dates/Times - pop-up will appear that allows uses to select or time.

Picklist Popup




Date Popup










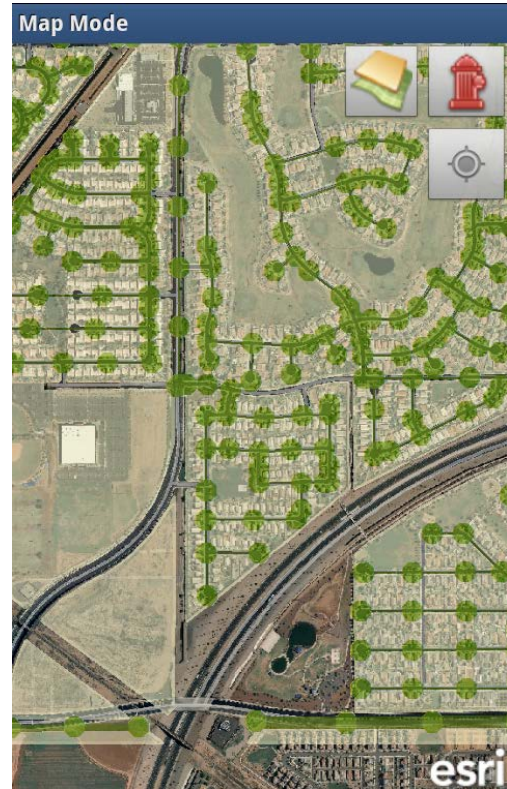
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## Map Mode





Map mode allows users to view work orders in a map, create them from a map, identify assets, and find locations. Map mode is launched by pushing the map button  on the Hub of within a Form.

**Work Order #** - In the top left corner the Work Order number is displayed, if a work order is selected.

-  **Current Location** - uses built in GPS to zoom the map to the device's current location and place a pin.
-  **Table of Contents** - Allows users to show/hide layers in the map.
-  **Tap options** - Controls which of the following operations occur when the user taps on the map display. The \*notes which option is active. Each of these tools provide identification information and the first three allow users to create a new work order or add the asset/x-y/address to the selected work order.
  -  **Asset** - Identifies the assets near the tap.
  -  **X-Y** - Find the X-Y coordinates at the tap.
  -  **Address** - Identifies the address at the tap.
  -  **Graphic** - Identifies a graphic near the tap. Graphics are created by the show in map tool and search places tool. Graphics represent assets or locations using a point, line, or polygon.



### Menu Options

-  **Bookmarks** - Allows users to bookmark different locations in the map for later use.
-  **Search Places** - Allows users to search for street addresses within the map.
-  **Clear Map** - Resets the map back to its default view/settings.
-  **Settings** - Opens the map settings allowing users to change the map and how work orders display.

## Available for Evaluation on Google Play

To evaluate Lucy Mobile Work:

- [Download the app](#) and launch it.
- Click the **Request Credentials** button. The application will prompt you for some information and then compose an email for you.
- Once we receive your request we'll respond with your credentials. Back in the app click the **Try it Out** button and login with your eval login/password.
- Enter the activation code that is subsequently emailed to you.
- Evaluate!

## Lucy Mobile (Tablet)

The Lucy Mobile app gives users more functionality and information at their fingertips which makes the work process more efficient.

Lucy Mobile is based on your Lucy Web setup and can be used with little additional setup.

### 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.

The Dashboard setup is based on the Lucy Web Dashboard setup.

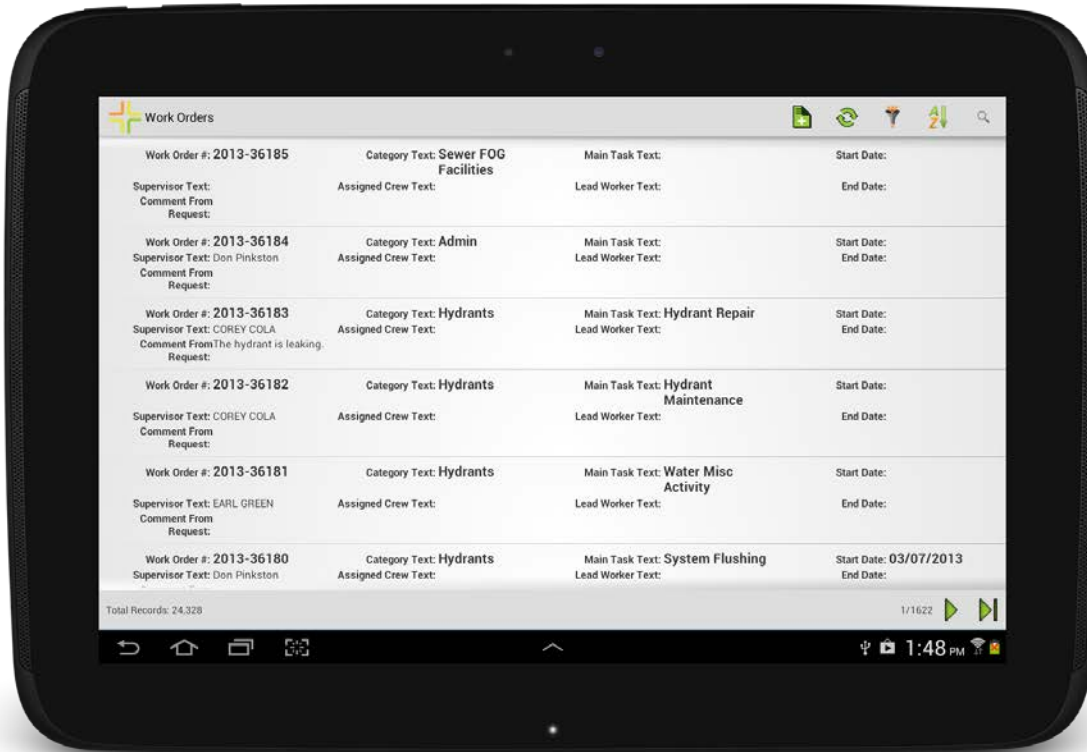


- **Asset Tree plugins** - Asset trees group assets together based on module and relationship. They work for the Site, Building, and Equipment inventories and can include a filter. The tree will show a list of records for the selected module. Expanding one of those records will show related records. Tap on a level of the tree to open a view of those records.
- **Data Drills plugins** - Data Drills take data from a module, filter it down, and then group the remaining records based on common attributes. Tap on any level of a drill down to open a view of those records.
- **RSS Feed plugins** - RSS feeds can display information from other websites. This can be used to display the weather, or other news on the Dashboard.
- **Map** - This tool opens up the Map tool. From there users can search for assets, create work orders, requests, and inspections.
- **Modules List** - This buttons opens a pop-up for users select a Lucy module they would like to open.




## 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.




The following tools/functions are available on a view.


**Open a Record** - Tap on a record to open it in a form.


 **Add Record** - Tap the Add Record button to open a blank form. When the form is filled out and saved the record will appear in the view.


 **Filter** - Tap the Filter button for a list of saved filters. Tap on a filter to load that filter into the view.

 **Sort** - Tap the Sort button to choose which field in the view to sort on.

 **Find** - Tap the Find button to search for a single record based on the Common ID

 **Delete Record** - Long tap on a record to enter selection mode. Tap the Delete button.

 **Show in Map** - Long tap on a record to enter selection mode. Tap the Show in Map button to see the asset, inspection, work order, or request in the map.

 **Document Control** - Long tap on a record to enter selection mode. Tap the Document button to attach photos and videos stored on the tablet to the record. You can also view other attached documents (pdfs, word docs, excel, etc...), attach websites, and modify the links to other existing documents.

## Forms

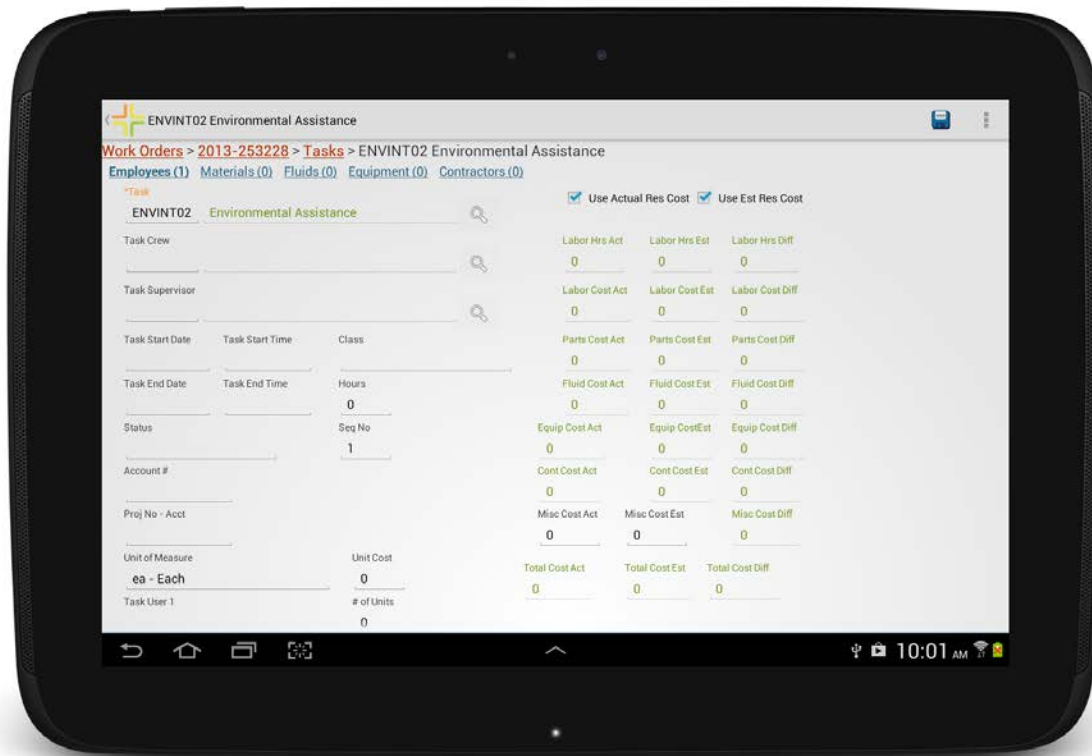
Forms are screens within the Lucity Mobile app that allow users to edit a record's attributes and view its related children records. Along the top of a form are two sets of links these help the user navigate through the form and find related records.

### Red Links

The red links show where the user is within a current form. In the example below the user is looking at a work order task so the Red Links list Work Orders > (Work Order ID) > Tasks > (Task ID). Tapping on Tasks will take you back to the view of all the task records related to the current work order. Tapping on the Work Order ID (2013-253228) will take you back to the form for the work order.

### Blue Links

The blue links show types of records related to the current record on the form. Beside each type is a count of how many records of that type are attached to the current record. Tap on one of these for a view of all related records. Within this view new records can be added.



Forms allow users to edit records. Different fields respond to the user in different ways

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Text/Number - When the user taps in these the device keyboard appears.

A text input field with the placeholder text "Bill E-mail".

Picklists - When a user taps on these a popup list appears that they can select from.

Two picklist input fields. The first is labeled "Status" and contains the value "2 - New Work Order". The second is labeled "Main Task" and contains the value "ENGTR06 Road Closures". A magnifying glass icon is visible on the right side of the "Main Task" field.

Date/Time - When a user taps one of these a date/time picker appears.

Two input fields for date and time. The first is labeled "Assigned Date" and contains the value "03/06/2013". The second is labeled "Assigned Time" and contains the value "8:33 AM".

Picklist Example

A screenshot of a picklist interface. At the top, there is a green header with the word "Problem". Below the header, there is a "Sort By" section with radio buttons for "Code" (selected) and "Type". A "Clear" button is located below the sort options. The main area of the picklist contains a list of problem codes and descriptions, including "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", and "CSINFOMSC - Info - Miscellaneous".

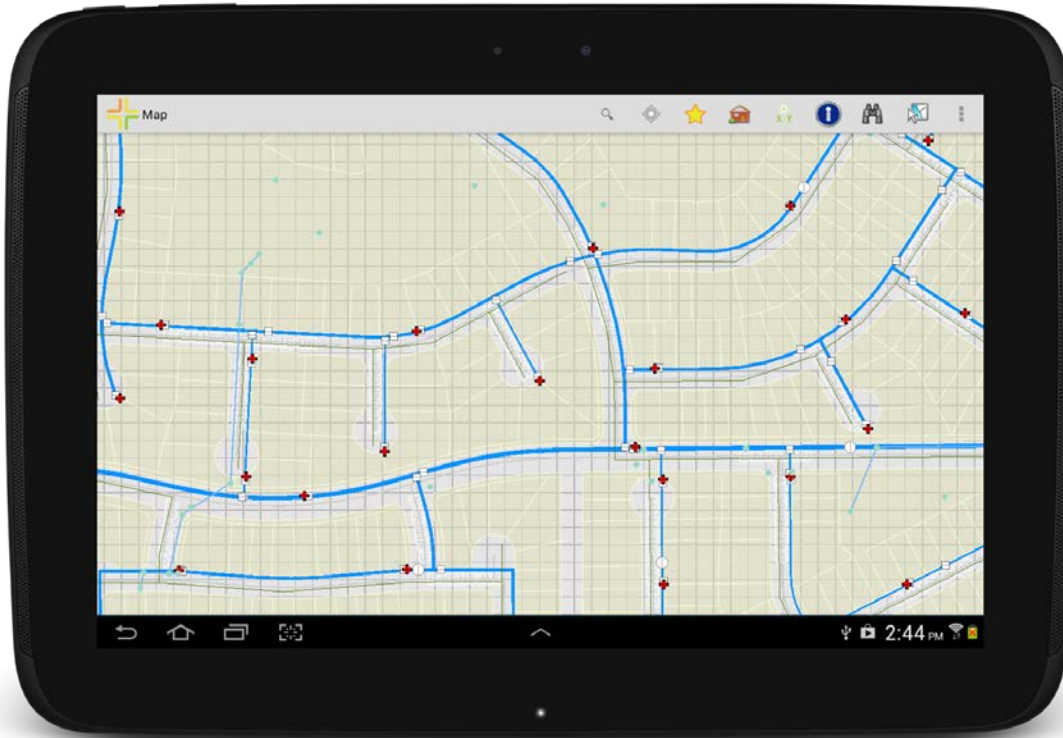
Date/Time Example

A screenshot of a date/time picker interface. The date "Tue, Mar 5, 2013" is displayed at the top. Below the date, there is a calendar grid for March 2013. The grid shows the days of the week (S, M, T, W, T, F, S) and the dates. The date "Mar 05, 2013" is highlighted. At the bottom of the calendar, there are "Cancel" and "Set" buttons.








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## Map

The Lucy Mobile map provides the ability to view assets in a map and interact with them. This allows users to find assets/address and collect information about them. They can also create work orders, requests, and inspections.



The following tools/functions are available in the map.

-  **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 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.

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.



Other Tools - These tools appear as options after one of the previous tools is run. For example when an asset is identified, a user can create a work order for it.



**Find Directions** - Allows users to load the selected address directly into a program like Google Maps that can find directions.



**Create Work Order** - Creates a work order with the selected address, x/y, asset attached. The work order is then opened for editing.



**Create Work Request** - Creates a work order with the selected address, x/y, asset attached. The work order is then opened for editing.



**Create Inspection** - Creates an inspection record for the selected asset.



**View Relationship** - View other Lucity records related to the asset.

## Up-Coming Features

- **Parts Inventory Integration** - This allows users to disperse parts to work orders while using Lucity Mobile. When configured properly, changing the number of units for a Work Order Material and saving will cause a prompt to show. The prompt will show locations where the part is available and the number of parts at each location. Choosing a location will disperse the requested amount from that location and save the material record.
- **Documents** - This new functionality will allow users to attach documents in the field and have them uploaded to their agency's network. This would allow them to take pictures in the field and have them uploaded to the office.
- **Create Work Order From** - This tool will allow users to create work orders from assets and requests.
- **Disconnected** - This is a new mode for Lucity Mobile. It will allow users to continue to enter work into Lucity mobile and lookup information, without being connected to internet. When they reconnect to the internet their work is automatically loaded back into the system.
- **Red lining** - This new feature in the map will allow users to add markups to the map.

**Create Alternate Inspection Types** - When creating inspections from the map, if there is more than one type of inspection available for an asset users will be asked what type of inspection they would like to create.

## Available for Evaluation on Google Play

To evaluate Lucity Mobile:

1. Download the app and launch it.
2. Click the Request Credentials button. The application will prompt you for some information and then compose an email for you.
3. Once we receive your request we'll response with your credentials. Back in the app click the Try it Out button and login with your eval login/password.
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