VERIZON WIRELESS
FIELD FORCE MANAGER
WEB PORTAL USER GUIDE
# VERIZON WIRELESS FIELD FORCE MANAGER WEB PORTAL USER GUIDE

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General Information

System requirements.

Mobile phone:
Verizon Wireless Field Force Manager–compatible mobile phone required. For a listing of Field Force Manager mobile phones, go to http://support.fieldforcemanager.com and select Devices.

Computer:
Field Force Manager is a Web-based application and requires connectivity to the Internet. High-speed Internet access is recommended. The following are requirements for accessing the Field Force Manager Web portal:

+ Microsoft® Internet Explorer® 7.0, 8.0, or newer, or Mozilla® Firefox® 2.0 or 3.0
+ Screen resolution of 1024 x 768 or better (to view full-screen lists and maps)

Privacy and mobility.

Verizon Wireless takes the matter of individual privacy very seriously. Each customer utilizing Field Force Manager must obtain the authorized consent of any individual affected by use of the service. Additionally, each individual has the ability to manage privacy settings by day of week and time of day to ensure that location information is collected, used, and transmitted only when approved by the user in possession of the mobile phone. Field Force Manager will only collect, use, and transmit information when the mobile phone is on and the Field Force Manager application has been launched. Since the application automatically launches each time the mobile phone is power-cycled or powered on, it is important that the user in possession of the mobile phone understand that the user must exit the application; otherwise, any location information will be sent to the customer as long as privacy management settings permit the collection of the data.

Field Force Manager is solely intended for lawful business use. Consent to use of location information is required. Location information is not guaranteed to be accurate.

Driver distraction.

Verizon Wireless also takes the matter of driver distraction very seriously. Although Field Force Manager is designed for use in the field, it must not be used while operating a vehicle or when the vehicle is in motion. Field Force Manager users must follow the following guidelines.

Mandatory safety guidelines:

+ When driving, always keep the phone charging and safely stored.
+ Field Force Manager must not be used by the driver while the vehicle is in motion.
+ Field Force Manager must be used outside of the vehicle, or while the vehicle is stationary.
Customer support.

Customer support for the Field Force Manager application is available through the Support and Training links on the Web portal, located at https://www.fieldforcemanager.com. Links are located at the top right of the screen. Web support: Go to http://support.fieldforcemanager.com or click the Support tab in the Web portal. Live Web training:

<table>
<thead>
<tr>
<th>Day</th>
<th>Morning</th>
<th>Afternoon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuesdays</td>
<td>9 AM CST</td>
<td>3 PM CST</td>
</tr>
<tr>
<td>Wednesdays</td>
<td>9 AM CST</td>
<td>5 PM CST</td>
</tr>
<tr>
<td>Thursdays</td>
<td>9 AM CST</td>
<td>1 PM CST</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 PM CST</td>
</tr>
</tbody>
</table>

Instructions for Web training:

1. Go to fieldforcemanagertraining.com
2. Find the date of the session you would like to attend on the list of Scheduled Meetings.
3. Click Register in the Status column and fill in the requested information.
4. Once registered, you will receive an email with login details, including the password and a toll-free conference telephone number. You will need this information to attend the meeting at your scheduled time.
   a. If by chance you do not receive an email, click on the following link to join the training: fieldforcemanagertraining.com
   b. Click Join Now
   c. Enter password 595133.
   d. Please sign on five to 10 minutes prior to start. WebEx will automatically set up Meeting Manager for Windows® the first time you join a meeting. To save time, you can set up prior to the meeting by going to https://fieldforcemanager.webex.com/fieldforcemanager/meetingcenter/mcsetup.php.

Notes:
+ The training is geared toward office workers; mobile workers need not attend.
+ Training lasts around one hour.
+ You do not need to bring a phone with Field Force Manager installed to the training.
Field Force Manager Customer Web Portal: Getting Started

Logging in.

1. Open a supported Web browser.

2. Navigate to https://www.fieldforcemanager.com. When you arrive at the site, a Field Force Manager icon will appear in the address bar of your browser. See Figure 1.

3. Using your Field Force Manager login credentials, enter your username, password, and company ID. (Note: Login information is provided to the main point of contact for your company in the Web Portal Information spreadsheet that was emailed when your company was first set up for Field Force Manager.)

4. Click Login. The system will then complete the process.
If you forget your password:
1. Click on the Forgot Password link under the Login button. A password-reset screen will open. See Figure 2.
2. Enter the email address assigned to your account. Click Continue.

Figure 2

3. An email will be sent to your email account. Follow the instructions in that email to regain access to the Field Force Manager Web portal. The link in the email will only be available for one hour after the email is sent to you.

Account lockout.
+ If you unsuccessfully attempt to log in six times with the same username/company ID, your user account will be locked. You will need to enter the text from an image in addition to your password to log into the system.
First-time Setup Wizard.

The first time that any Web user logs in to your Field Force Manager account, a setup wizard will run, asking that user to enter profile information. This will ensure that a user’s name, time zone, and email address are correct. The first Web user to log in as an administrator for your company will be presented with the full version of the First-time Setup Wizard. This setup wizard helps configure a company’s account to take advantage of some of the most popular features. See Figure 3.

![Field Force Manager Setup](image)

**Figure 3**

Profile.

This step allows a Web user to make sure his Web profile is set up correctly. The user can set his name, time zone, and email address, and request that alerts be sent to his email address. All Web users will be asked to complete their individual profile information.

Mobile workers.

Typically on first-time login, the names of the workers are set to their mobile phone numbers. This allows the Web user to input worker names and vehicle information, as well as the time zone for each worker.

This tab also contains a menu where a user can change the Field Force Manager language from English to Spanish for each user’s mobile device. If a user’s language is set to Spanish, the user will receive a notification of the change in that language. Mobile worker information can also be configured in the Users tab in the Web portal.

Industry-smart.

Getting started with Field Force Manager has never been easier. The Field Force Manager software has a powerful set of forms, alerts, job types, and reports that can be configured to meet your needs. Web administrators now have the ability to choose from industry-oriented configurations for their Field Force Manager company account. The system will automatically install a configuration based upon the selected industry. Users can further change the configuration through the existing configuration tools.
Settings.
This step allows the user to configure the days and time when the application will locate mobile workers. The user can set the start and stop time for GPS collection and choose the days and times (hours of operation) when the application should start up. The option of auto-shutdown after hours of operation is also available on this screen.

Device power settings
This feature—located in the Settings tab—allows a Web user to change the GPS send rate for devices in the company. The power setting options change how often GPS points are sent to the Web portal.

Note: GPS collect and send rates can be further customized under Administration>Settings>Company Settings.

Scheduled reports.
This step allows a Web user to set up the At a Glance daily summary report to be sent to themselves.

Note: The setup wizard can be re-run by going to the Administration->Settings->Company tab and selecting the setup wizard button from the toolbar on the left side of the Web portal.

Field Force Manager Web Portal Interface
This section gives a general overview of the Web portal interface and navigation.

Tabs.
There are eight major tabs in the Web portal: Workers, Maps, Jobs, Locations, Alerts, Messages, Reports, and Administration. See figure 4. The tabs available are determined by the Field Force Manager package your organization has purchased.

![Locations List](image)

Figure 4

Refresh.
The Web portal displays the most recent information upon request. Refreshing the Web portal does not pull information straight from the mobile device, but shows what has been communicated to the Field Force Manager database since the last refresh period. Any task you might be working on in the Web portal is not disrupted by this process, so you can access updated information without interrupting your work.
Even when you are not interacting with the Web portal, it will automatically refresh every 15 minutes to show you the most recent information on the Field Force Manager server. The Web portal also displays a countdown clock so you know how many minutes remain until the next refresh. (Note: The 15-minute time period is a default setting that can be changed in My Settings under the Administration tab.) If you want current information without waiting for the automatic refresh, click Refresh Now to display the most recent field data from the Field Force Manager system. See Figure 5.

Upon refreshing, list items that have changed will be highlighted for four seconds. Lines that flash green are new items that have been added to the list (e.g., a new job); lines that flash yellow are items that were present but have changed on the list (e.g., a worker has a new GPS point); and lines that flash gray have been removed from the list (e.g., a deleted or reassigned job). The flashing of these items can be turned off in My Settings under the Administration tab.

Options menu.

Whenever you see a list in Field Force Manager, clicking on an item in that list will open up an options menu. In the options menu, you will find quick links to the different functions attached to the item you clicked. Figure 6 below shows a Workers List. Clicking on a specific worker in that list has made an options menu appear. To access a specific function, click on the option you want (for instance, if you want to see a worker’s map, click on View Worker Map). To cancel out of an options menu, click the X in the upper right-hand corner.
Maps tab.

Maps navigation.

The Maps tab gives you a map view of your mobile workers' current locations, and also shows all job locations and location points for your company. The map will automatically zoom in to show the filtered data. Follow the items below to navigate around this map and all other maps in the Web portal. See Figure 7.

![Map Image](image-url)
Zoom toolbar.
The zoom toolbar is displayed on the upper left-hand side of the map. Use it to zoom in and out of the map for either a close-up or large-scale view.

To zoom in, click above the current position of the marker on the toolbar or click the + icon.
To zoom out, click below the current position of the marker on the toolbar or click the – icon.
You can also zoom in or out of an area by scrolling with the mouse wheel. Double-click on the map to do a quick zoom.

Draggable maps.
The Web application allows you to move around any of the maps quickly and easily. To view an adjacent area of a map, grab the map by clicking and holding down the left mouse button. As you hold down the button, move the mouse as if your hand was on the map, dragging the map to the area you would like to view. A moment after dragging the map to a new view, updated icons will appear for your workers, locations, and jobs.

Refit map to data.
This is a helpful tool to see all of your data after zooming in on a particular area. Click on this icon to zoom out and redraw the map so that all jobs and workers are displayed on the map.

Limited items.
To make sure the maps are fast and easy to use, the Web application will display no more than 1,000 items of any given type at one time. For example, if a map has 1,500 locations and 200 jobs, the map will display 1,000 locations and 200 jobs. The map will display a warning message at the bottom of the map, notifying the user that not all of the locations are displayed. To ensure that all necessary items are viewable, either zoom in to a specific geographic area or use the Group and Display filters to restrict items displayed on the map.
Mouse-over menus.

Whenever you view a map in Field Force Manager, you can hold the mouse over an icon on the map to display the information attached to that icon (location, worker, or job) and bring up a mouse-over menu. In this menu, you will find quick links to the different options attached to the icon. See Figure 8.

![Figure 8](image)

Map export feature.

The **Export button** allows you to export data from Field Force Manager to a KML file. KML files allow the map data to be viewed in third-party software and online services such as Google Maps, Google Earth, ESRI, AOL MapQuest, Microsoft MapPoint, and Yahoo! This lets you view saved Field Force Manager locations, job sites, and worker positions within the specialized traffic, satellite, and street-view maps supplied by these third parties.

Once the data has been exported, it will not be updated when online information about workers, jobs, or locations is updated.

**Note:** Third-party software and online services are not provided by Verizon Wireless and their use is subject to terms required by the software or service provider. If an exported KML file is used with software or online services not provided by Verizon Wireless, it is no longer subject to the Verizon Wireless privacy policy. The provider’s terms of use and privacy policy should be carefully reviewed before such use.

**To export map data to a KML file:**

1. Open the map you want to export in Field Force Manager.
2. Click **Export**, found in the toolbar on the left-hand side of the screen.
3. Click **Export to KML file**. A small window will appear asking if you would like to save the file to your computer.
4. Click **Save**. The file will now download onto your computer. When the download is complete, double-click the file to open it in any KML-compatible software program.

Note: To view a Field Force Manager map in any third-party software (such as Google, ESRI, AOL MapQuest, Microsoft MapPoint, or Yahoo!), that third party’s software must be installed on your computer before the map is viewable.

**Filtering, sorting, and searching.**

*Filter.*

The Filter function allows you to view specific data on maps and reports.

*Date/Time filter.*

The Date/Time filter is used to view data on maps and reports for a specified date and time.

1. In the toolbar on the left-hand side of Field Force Manager Web application, find the **Date/Time Filter**.

2. Click **Set Date Filter** to bring up the filter selection.

3. Field Force Manager offers two types of Date/Time filters:
   a. **Relative**—Specifies a relative time frame from the current date. For instance, choosing **Today** would always display the current date and time information each time you log in to the Web portal. See Figure 9.
b. Fixed—Allows a user to specify a time frame and duration in the past or future. This mode is typically used for researching a specific time frame. See Figure 10.

![Date Filter](image)

Figure 10

4. Select the appropriate date and time settings, and click **Save**.

**Note:** The Web portal will remember your last date and time filter settings the next time you log in. Make sure the date and time filter is set to the range you would like to view.
Work Groups filter.
The Work Groups filter will allow a user to view data in the Web portal for selected groups. Additional work groups can be added through the Administration tab.

1. Click **Group Filter** on the left-hand side of the Web application toolbar.
2. Check or uncheck the appropriate boxes next to the divisions or groups to specify the groups you want to view. See Figure 11.

3. Click **Save**

**Note:** The Web portal will remember your last Work Groups filter settings the next time you log in. Make sure the group filter is set to the date and time range you would like to view.
Display filter.

On the Maps, Jobs, Workers, or Locations tabs, you’ll see Display filter in the toolbar. This feature allows a Web portal user to view a subset of data based on the filtered settings. The Display filter controls the display of workers, locations, jobs, geofences, labels, GPS, and stop and action information on the map.

1. Click **Display Filter** to display the worker status and symbology filter.

2. Check or uncheck the appropriate boxes and click **Save**. See Figure 12.

![Figure 12](image)

**Note:** The Web portal will remember your last Display filter settings the next time you log in. Make sure the Display filter is set to the selections you would like to view.

**Sort.**

Within each tab of the Web portal, a user can sort the data by the column headers displayed. For example, if a user wants to display workers by name in ascending order, he would do the following:

1. Select the **Workers** tab.
2. Click on the **Name** column header.
A downward arrow will appear next to the column name when the user is sorting in ascending order.

![Name ▼]

An upward arrow will appear next to the column name when the user is sorting in descending order.

![Name ▲]

**Search.**

Use the following procedure to find a specific worker, job, or location:

1. In the Search field, enter the search criteria.
2. Select the item from the drop-down menu.
3. Click **Search**. The search results will appear in the search window.
Workers tab.

The Workers tab is used to monitor your mobile workforce. All of the information on this screen is displayed as soon as the application uploads the information. From this tab, you can see whether or not a worker is in cellular or GPS coverage (indicated by the Stoplight), the worker’s name, which division he belongs to, his last known communication status, his last known location, and the date and time the last known location was gathered. The final column shows how many pay hours a mobile employee has in the current week. See Figure 13. When navigating within the Workers tab, make sure your filters are set correctly to view the information you need.

![Workers List](image)
Stoplight.
The Stoplight feature shows the connection status of your workers’ mobile devices. This is displayed with two colored circles. The first circle (the Communication Stoplight) signifies the phone-connection status of each worker.

- Green indicates that the mobile phone has communicated with the server in the last 65 minutes.
- Red indicates that the mobile phone has not communicated with the server in the last 65 minutes. That worker’s status will be changed to Logged Out Due to Inactivity.

The GPS Stoplight is to the right of the Communication Stoplight and signifies the GPS connection status of a worker.

- Green indicates that a valid GPS point has been received in the last 65 minutes.
- Yellow indicates that a valid GPS point has not been received for over 65 minutes but the communication status with the worker’s device is still good.
- Red indicates that a worker has either logged out or that the last communicated GPS point warned of an error due to GPS restriction or low battery in the device.

- Last device communication and GPS point within 65 minutes.
- Device communication but no GPS point within the last 65 minutes.
- Last device communication within 65 minutes but GPS is restricted or has a low battery.
- Check worker status. If Logged Out Due to Inactivity, worker has not properly logged out and the device has not communicated in over 65 minutes.
- Check worker status. If Logged Off, the program on the device has been properly exited by the worker.
Name.
The Name column displays the name of each worker. For an in-depth view of a specific worker, you can click on that worker’s name. This will let you view specific details on the worker. Here you can view the worker activity log, locations, jobs, worker details, and that specific worker’s map.

Status.
The Status column shows the last known status of each worker. Listed below are the types of statuses displayed in this column:

- **Logged In**: Logged in to Field Force Manager and GPS points are being collected. At this time the worker is not using timesheets.
- **On Shift**: Logged in to Field Force Manager and worker has started a shift by using the Start Shift timesheet functionality.
- **On Break**: Logged in to Field Force Manager and worker has started a break by using the Start Break timesheet functionality.
- **Logged Out Due to Inactivity**: The application has not communicated with the server in the last 65 minutes. The worker has likely powered the phone down without exiting Field Force Manager.
- **On a Job**: Logged in to Field Force Manager and actively working on a job. This status is only available in the Premium Package.
- **Logged Off**: The worker has logged off by exiting the application from the main menu. This signifies the application is off and GPS points are no longer being collected.
Location.

The Last Location and Location As Of columns display the last known location of the worker, and the date and time the GPS point was gathered. Until Field Force Manager receives an updated GPS point, it assumes that the worker has not moved from a specific location. In the event the worker is stopped at a location or a job, the location or job where he last stopped will be listed. If the worker is listed at a location designated as Unknown, the worker has visited a site that is not yet created as a location or job within the Web portal. See Figure 14.

<table>
<thead>
<tr>
<th>Last Location</th>
<th>Location as of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stopped: 0:11 hrs Location:</td>
<td>09/27/07</td>
</tr>
<tr>
<td>Eddie Puckett--1254 Stonewood Ct</td>
<td>05:03 PM CDT</td>
</tr>
<tr>
<td>Arnold, Maryland 21409</td>
<td></td>
</tr>
<tr>
<td>Stopped: 0:11 hrs Location:</td>
<td>09/27/07</td>
</tr>
<tr>
<td>Unknown</td>
<td>05:13 PM CDT</td>
</tr>
<tr>
<td>2401 S Venoy Rd</td>
<td></td>
</tr>
<tr>
<td>Westland, Michigan 48186</td>
<td></td>
</tr>
<tr>
<td>Traveling: 0:11 hrs</td>
<td>09/27/07</td>
</tr>
<tr>
<td>20124 7 Mile Rd W</td>
<td>04:31 PM CDT</td>
</tr>
<tr>
<td>Detroit, Michigan 48219</td>
<td></td>
</tr>
</tbody>
</table>

Figure 14

Note: Job stop information is only available in the Premium package.

Pay hours.

The Pay Hours column displays how many pay hours each mobile employee has worked during the past week. This column will update every 15 minutes to give you current and accurate information during your workers’ shifts and the work week. The start day of the week for calculating pay hours can be set in Company Settings.
Worker map.
If you would like to see a map of where your workers currently are, click the Workers tab and then click Worker Map in the toolbar. Whenever a worker logs in or out, starts or ends a shift or break, or submits a form, an icon will appear on the map, pinpointing when and where that worker was when performing the action (see icons below). GPS points are also collected and shown on the map when a worker first logs in.

![Worker has logged in.]
![Worker has logged out.]
![Worker has started a shift.]
![Worker has ended a shift.]
![Worker has started a break.]
![Worker has ended a break.]
![Worker has submitted a form.]

From the map, you can also set filters for locations, jobs, and workers, to see only the data that is important to you. All of the map controls work the same throughout the Web portal. To get back to your list of workers, click the Workers List button, or click on the Workers tab.

Activity log.
In the Workers tab, if you click on a worker’s name, an options menu will appear. To see that specific worker’s activity log, click View Worker Activity Log. Here you can view all of the actions that worker has performed within the date and time range you have specified using your Date/Time filter. A “perfect day” using the Field Force Manager software will show a Login, Start Shift, End Shift, or Exit Field Force Manager (if you are using timesheets). There is also an Activity filter, which allows you to specify the actions you want to view, such as timesheets, login/logout, GPS errors, and ad hoc forms. See Figure 15.
Worker locations.

In the Workers tab, if you click on a worker’s name, an options menu will appear. Clicking View Worker Locations will show you any locations that have been set up in the Web portal and sent to that worker’s mobile phone.

Worker timecards.

In the Workers tab, if you click on a worker’s name, the Options menu will appear. Clicking on the View/Edit Worker Timecards option will show you the worker’s timecards for the filtered time period and allow you to edit and view timecard edits. See Figure 16.
Editing a timecard:

1. Select the shift you would like to edit.
2. Click the row you would like to edit (you can only edit one shift at a time). The Timecard Options menu will appear.

3. Select Edit Shift.
4. Edit the date/time of shifts and breaks in the case where a mobile worker forgot to punch in or out on time. See Figure 17.
   a. If a user forgot to perform an action altogether, the action can be added by pressing the Add Break or Add Shift button.
   b. Comments on the edit can be entered by pressing the Comments button.

![Figure 17](image-url)

- Each timecard action must be separated by at least one minute.
- Timecard shifts cannot overlap.
5. Select Save when changes are complete.

Adding a shift:

1. Press the Add Shift Button.
2. Edit the starting time and date.
   a. You can add the end date/time or leave open.
3. Select Save.
Viewing timecard edit history:
1. Select the shift you would like to view edit history for.
2. Click the row of the row you would like to view (you can only view one shift at a time). The Timecard Options menu will appear.
3. Select View History. See Figure 18.

Worker jobs.
In the Workers tab, if you click on a worker’s name, the Options menu will appear. Clicking on View Worker Jobs will show you any jobs that have been dispatched to this specific worker along with the status of that job. You can click on a job reference number to automatically go to the Jobs tab and view the job’s details.
Time-off.

In the Workers tab, if you click on a worker’s name, the Options menu will appear. Clicking on the Times-off option will bring you to the Times-off list for the worker. See Figure 19. Time-off is used to change the worker’s availability for scheduling jobs. Time-off will also prevent remote start messages from being sent to the mobile worker’s device during their time-off.

Figure 19.

Creating a time-off:

1. Select the Create Time-off button on the Workers Times-off list. See Figure 20.
2. Select the Start and End date and time for the time-off.
3. Select a reason code and enter notes if necessary.
4. Select Save & Close.

Figure 20
Worker details.

In the Workers tab, if you click on a worker’s name, an options menu will appear. Clicking on View Worker Detail will display any information that has been entered about this specific worker. It will display their name, which group they belong to, their last known location, the date and time it was received, and their hours of operation. You can also access a worker’s jobs, locations, and maps from the Worker Details window in the toolbar on the left side of the screen. See Figure 21.

![Figure 21](image-url)
Ping worker/ping workers/auto-ping.

During normal operation, Field Force Manager tracks the location of the worker every two minutes and uploads the GPS information to the server in batches every 14 to 28 minutes. The Ping functionality allows a Web user to request GPS information to be collected and sent to the Web portal immediately. (GPS information will only be sent if the device is in a location where GPS information can be collected.)

**Ping:** The worker map and worker drill-down menu allow a single worker to be pinged at a time.

**Ping workers:** The worker map and work list has a Ping Workers button, which allows up to 20 mobile workers to be pinged at one time.

**Auto-ping:** When pinging multiple workers, a Web user may choose to auto-ping the mobile workers every 60 seconds for the next 10 minutes. When this option is selected, the workers selected in the multiworker ping will upload their GPS coordinates each minute for the following 10 minutes. See Figure 22.

![Figure 22](image)

Worker map.

In the Workers tab, if you click on a worker’s name, an options menu will appear. Clicking View Worker Map will display the last known location of this worker. You can also view the breadcrumb trail of where this worker traveled throughout the specified dates and times you set in the Date/Time filter. By holding your mouse over the red dot icons on the map, you can see the date and time that specific GPS point was collected; if enough information was collected, it will also show you the worker’s direction and speed.

Auto-application startup.

If a worker has not logged in to the Field Force Manager application and his phone is on, the Web user can press Remote Start in the Options menu to start the application on the mobile phone. The mobile phone will receive a SMS message that will start the application. (Note: This feature will not work if the device has a block on text messages.)
**Worker Daily Timesheet report.**

The Worker Daily Timesheet report is created based on your Date/Time filter; however, because this is a daily report, it will only create the report based on the first day specified in your filter. This report will show you a breakdown of that worker’s day through stops. It displays total pay hours, number of stops, travel distance, travel time, and total time at stops. This can help when dispatching workers to jobs throughout the day. To run this report, click on a name from the Workers List. When the Options menu appears, select Reports and then click Worker Daily Timesheet. See Figure 23.

![Figure 23](image)

**Worker Detail report.**

The Worker Detail report displays jobs completed by that specific worker, job start and end dates and times, and the duration of the job. It also totals the number of jobs started late, which can help when giving customers estimated service times. This report also totals the time spent on all jobs and averages the amount of time spent per job. To run this report, click on a name from the Worker List. When the options menu appears, select Reports and then click Worker Detail Report.

**GPS and Stop report.**

The GPS and Stop report is created based on your Date/Time filter; however, because this is a daily report, it will only create the report for the first day specified in your filter. This report will show you a breakdown of that worker’s day through stops. The report also shows each nonstop GPS point with speed, direction of travel, latitude, longitude, and approximate address. To run this report, click on a name from the Workers List. When the Options menu appears, select Reports and then click GPS and Stop Report.
Locations tab.

The Locations tab is used to maintain locations or customers for your company. For example, specified locations can be vendor sites, workers’ homes, or any other location where a worker might frequently stop.

Creating a location:

1. Select the Locations tab. See Figure 24.

![Locations List](image)

2. Click Create Location. A new window will open.
3. Select the location type you are creating from the drop-down menu.
4. Enter the location name and address.
5. Click Create Location to save the location information.

6. To view a location on the map, click Locations List. Check the box next to the location name and click Locations Map.
7. To view location details, click Locations List and click the location name.
Editing a location:
1. Select the Locations tab.
2. Click the name of the location you would like to edit. The Options menu will appear. See Figure 25.

3. Click Edit Location. A new window will open. See Figure 26.

4. Make the desired changes and click Save.
Deleting a location:

1. Select the Locations tab.
2. Click the name of the location you would like to delete. The Options menu will appear.
3. Click Delete Location
4. A confirmation window will appear. Click OK.

Sending a location to a mobile worker:

(Only available in Basic and Premium packages.)

1. Select the Locations tab.
2. Select the location you would like to send to your worker. The Options menu will appear.
3. Click Send Location to Workers. A new window will open.
4. Check the box to the left of the name of each worker or group that will receive the location. See Figure 27.

5. Click Send

If Field Force Manager is running in the foreground of the worker’s mobile phone, the phone will beep to signal the receipt of a new location. The worker can then access the locations menu on the phone and get driving directions to that location from his last known GPS location.

Web users can also make locations available to specific workers by checking the desired groups in both the Create Location and Edit Location windows.

Figure 27
Viewing location detail:
This feature allows you to view the specific information attached to a location.
1. Select the Locations tab.
2. Click the name of the location you would like to view details for. The Options menu will appear.
3. Click View Location Detail.

Viewing job history at a location:
(Only available in the Premium package.)
You can view jobs that have been linked to a particular location by viewing the location’s job history.
1. Select the Locations tab.
2. Click the name of the location you would like to view the job history for. The Options menu will appear.
3. Click View Job History.

Geotuning a location or job:
Geotuning is a feature that lets you tune the latitude and longitude of a location or job.
1. Mouse over a location or job.
2. Click Geo-Tune on the mouse-over menu. See Figure 28.

3. The cursor icon will change to a target icon.
4. Click the map on the spot where you would like to move the location or job.

Figure 28
Configuring a WorkZone for a location or a job:

WorkZones are used to surround a location or job and can activate alerts when mobile devices cross the boundaries of those specified zones.

1. Mouse over the desired location or job.
2. Click **Configure WorkZone** on the mouse-over menu. See Figure 29.

![Figure 29](image)

3. A new window will open, showing the icons from the currently viewed map.

4. Click **Circle** or **Polygon** to specify the desired WorkZone. You can also adjust an existing WorkZone. See Figure 30.

![Figure 30](image)

5. Click **Save**.
Uploading locations:

1. Select the Locations tab.
2. Click Upload Locations. A new window will open. See Figure 31.

3. Click Get Template to download the location upload template.
4. Unzip XLS, CSV, and TXT files to your computer.
5. Enter locations into the XLS or CSV file. Save the file.
6. Click Browse in the Upload Locations window.
7. Select the file to be uploaded.
8. Check Update Records if you want the new records to update existing records.
9. Click Submit.

The following information can be uploaded for a location:
+ Name (required)
+ Street address (required)
+ City
+ State
+ ZIP code
+ Country
+ Latitude
+ Longitude
+ Contact name
+ Contact phone
+ Location type (must match an existing location type)
Messages tab.

(Only available in Basic and Premium packages.)

The Messages tab allows you to send messages to any of your mobile workers. This feature is strictly a one-way messaging service. Field Force Manager must also be running in the foreground of the worker’s mobile phone to be notified immediately of new messages. Field Force Manager does not use Verizon Wireless text messaging to send messages. See Figure 32.

Figure 31

Figure 32
Within the Messages tab you will see three buttons:

- **Inbox** is where any messages that were sent to users will appear. Clicking on a message will open an options menu, giving you the choice to read or delete the message.

- **Sent** allows you to view any messages that you have sent, who received them, and the date and time that the messages were sent.

- **Deleted** allows you to view any messages that you have deleted.

**Creating a message:**
1. Select the **Messages** tab.
2. Click **Create Message**. A new window will open.
3. Select the **workers** you would like to send the message to.
4. Enter a subject and the text of the message.
5. Click **Send**.

**Viewing sent messages:**
1. Select the **Messages** tab.
2. Click **Sent**.
3. Click the **name of the worker** you sent the message to. The message text will appear.
4. When done viewing the message, click the **Messages** tab to return to the message list.

**Deleting a message:**
1. Select the **Messages** tab.
2. Check the box to the left of the message(s) you would like to delete.
3. Click **Delete**. A delete confirmation box will appear. Click **OK**.

**Jobs tab.**
*(Only available in Basic and Premium packages.)*

Field Force Manager allows the dispatcher to send jobs to mobile workers in the field. Jobs functionality varies, depending on the package you have. See Figure 33.
The Premium package provides advanced job dispatch from the Web portal to the mobile user. The Web-portal user can look up jobs and link them to known locations in the system, helping reduce data entry errors. The Web-portal user can also view all jobs or a single job on all maps, read details of a job, call ahead to a job contact, and obtain both audible and map-enabled driving directions to the job. The mobile user can update the job status (with options such as Accept, Reject, In Transit, Start, On Hold, and Complete). Upon completion of a job, the mobile user is prompted with the Job Completion Form. Once a job is completed, the history can be viewed from the Jobs List or via the Location Job History feature.

Creating a job:
1. Select the Jobs tab.
2. Click Create Job on the toolbar. A list of job types will appear.
3. Fill in the necessary job details. See Figure 34. (Note: The comments field is only available in the Field Force Manager Premium package.)

![Create Job](image)

Figure 34

4. Click Next to move to the Locations tab, or click Job Location at the top of the window.
5. Enter a valid address for the job location.
6. Click Validate Address to verify that it is an actual address and can be plotted on the map.
7. Once verified, click Next to go to the Job Details screen.
8. Fill in the necessary job details.
   a. The job name is the name that is displayed to the mobile worker. Choosing a name that is descriptive like the customer's name or the type of service is recommended.
   b. The job reference number is a unique number for the job. You can enable the system to automatically generate a job reference number in the Company Settings part of the Web portal.
9. The details will be different based upon the job type selected.
10. When finished entering the job details, click Next to move to the Job Parameters screen.
11. Select which skills are required for the job

12. When finished entering the Job Parameters, click **Next** to move to the schedule screen.

13. Select the date and time that this job is to be scheduled for. To leave the schedule time open, uncheck the **date** and **time checkboxes**.

14. Select the **duration** of the job.

15. Select the **job priority**.

16. Select the **group** and **worker** this job is to be assigned to. To leave the job unassigned, do not select a group or worker. A job assigned to a group is not available for download to a mobile workers device.

17. Click **Save & Close** to save the job, or click **Save & New** to continue creating new jobs.

**Recommending a worker:**

1. To assist in the process of selecting which mobile worker to assign a job, the Web user can select the **Recommend Worker** button. The system will show a decision matrix for each of the company’s workers and score the worker’s applicability for the job. See Figure 35.

2. Once a worker is selected from the recommend list, the recommend worker system shows the following elements for each worker:
   
   a. **Name**
   
   b. **Group**
   
   c. **Availability**
      
   1. Is the worker within hours of operation/time-off?
   
   d. **Capacity**
      
   1. What percentage of the worker’s capacity for the job’s scheduled time slot is full?
      
   2. 0% = no jobs currently scheduled; 100% = time slot is full

   e. **Assigned Jobs**
      
   1. Total number of jobs assigned to the worker that have not been completed. This includes jobs for all time slots in the past, present, and future.

3. Click **Save & Close** to save the job or click **Save & New** to continue creating jobs.
a. Skills Match

Based upon the required skills for the job set in step 2, this is the % of skills that are matched.
1. 0% = no match; 100% = all skills are matched.

Linking jobs to customers:
1. Enter the name of the customer you want to look up and link the job to. After you enter three characters, the system will present a list of matching customers. Using your mouse or the keyboard arrow keys, select the customer you would like to link the job to and hit the enter button.
2. The contact and address information for the customer will be populated into the job.

Editing jobs:
1. Select the Jobs tab.
2. Click the job that you would like to edit. An option menu will appear. See Figure 36.
3. Select **Edit Job**. A new window will open.
4. Edit the information as desired.
5. Click **Save**.

**Deleting jobs:**
1. Select the **Jobs** tab.
2. Click the **job** you would like to delete. An options menu will appear.
3. Select **Delete Job**.
4. A confirmation box will open. Click **OK**.

**Reassigning jobs:**
1. Select the **Jobs** tab.
2. Click the **job** that you want to reassign. An options menu will appear.
3. Select **Reassign Job**. A new window will open.
4. Select the new **group or worker** to reassign the job to. Click **OK**. The newly assigned worker or group will receive notification and job information on their phones. The system will also remove the job from the original worker’s or group’s phones.

**Viewing job details:**
1. Select the **Jobs** tab.
2. Click the **job** that you want to see more detail for. An options menu will appear.
3. Click **View Job Detail**.

**Viewing the job activity log:**
1. Select the **Jobs** tab.
2. Click the **job** that you want to see the activity log for. An options menu will appear.
3. Select **View Job Activity Log**.

**Viewing worker jobs:**
1. This feature allows you to view all of the jobs assigned to a specific worker.
2. Select the **Jobs** tab.
3. The Jobs List includes the name of each worker assigned to a job. Click the **job** with the worker you want to view.
   An options menu will appear.
4. Select **View Worker Jobs**.
Availability calendar.

The availability calendar within the Web portal gives users looking to dispatch jobs the ability to visualize all of the jobs for all workers for a day. The availability calendar is available from tool-bar buttons on the Worker and Job tabs.

The availability calendar uses the concept of a timeslot to aid in the dispatch of jobs. A company can choose to have small hourly timeslots (default) or larger half- or even full-day timeslots. The availability calendar color codes each timeslot for a day based upon a worker’s availability. Worker availability is determined by the hours of operation set for the mobile worker and also take into account any schedule exceptions made in the time-off system. Each timeslot has a capacity of jobs that can be scheduled into it before it is considered to be over capacity. The capacity for each timeslot is calculated based upon the scheduled start time of the job. It does not take into account jobs that start in other timeslots or the actual start times of jobs. See Figure 37.

Figure 37

Time slot color codes:
+ **Unavailable (Grey)**—The timeslot for the worker is either outside the hours of operation for the worker or the worker has taken the entire timeslot off.
+ **Available (Yellow)**—The timeslot for the worker is within the worker’s hours of operation and the worker has not requested time off for the entire timeslot. In addition, the timeslot has not been filled with jobs for the worker.
+ **Booked (Blue)**—The timeslot for the worker had availability, but the availability for the timeslot has been filled.
+ **Over capacity (Red)**—The timeslot for the worker is overbooked. The capacity for the timeslot has been exceeded or the worker was unavailable to start with.
Jobs on the calendar:
+ Jobs will appear on the calendar once they're scheduled for a specific worker. The job will appear as a solid line starting at the scheduled start time of the job and will be marked as ending based upon the expected duration or scheduled end time of the job.
+ Once a job has been started, the job will show as a dotted line from the actual start time of the job and will project to the job's expected end time. Once the job has been completed, the actual end time of the job will be updated with the dotted line.
+ The current status of a job on the calendar can be determined by looking at the icon that appears on the job. This is the same icon that appears for jobs on the Jobs list or map.
+ You can mouse over the status icon on the calendar to view additional status information for the job. When you mouse over the icon, a pop-up will appear that provides links to view additional details and views of the job.
+ To make changes to jobs on the calendar, the user can edit the job from the mouse-over menu or from the Jobs List screen.

Configuring timeslots:
+ By default, a company is configured with timeslots for Monday through Friday, 8 AM to 6 PM.
+ Timeslots are used to manage the capacity and assignment of jobs for your workers. Choosing small timeslots allows you to manager down to the hour. Choosing larger timeslots allows you to manage at a multihour level.
+ Timeslots can be changed, added, or removed by pressing the Configure Timeslots button at the top of the availability calendar. See Figure 38.

To add/edit a time slot:
1. Choose Configure Timeslot button.
2. Select New/Edit Timeslot.
3. Choose the day of the week.
4. Select the start time for the timeslot.
5. Choose the duration for the timeslot.
   **Note:** Timeslots cannot overlap with each other.
6. Choose the capacity for the timeslot.
   This is the number of jobs that can be scheduled for a worker before a timeslot is considered to be over capacity.
7. Select Apply.
8. Add or change other timeslots.
9. Select Save & Close to save your changes.
To delete a timeslot:
1. Select Timeslot from the select list.
2. Choose Delete Timeslot button.
3. Select Save & Close to save your changes.

Worker and job match:
To aid in the dispatch of the right worker to right job, the Web portal allows workers and jobs to have defined skill sets. The Web user for the company can configure which skill sets are available to be set up for workers and jobs within the company. See Figure 39.
Creating a skill:

1. Select the Worker & Job Match-Skills tab.
2. Select the Create Skill button; a create window will open. See Figure 40.

![Figure 40](image-url)

3. Give the skill a unique name, description, and code.
4. Click Save & Close when completed.
Reports tab.

The Reports tab provides instant access to a variety of online reports. Reports are also available from the Workers, Jobs, and Locations tabs. All of the reports listed in Report Types below can be exported to PDF or Microsoft Office Excel® formats. The information generated in these reports will be based on the Date/Time and Worker filters that you set for each report.

Running a Field Force Manager report:

While the example below shows how to run the Alert report, all reports you run from the Reports tab will have the same steps.

1. Click the name of the report you would like to run. An options menu will appear. See Figure 41.

   Figure 41

2. Select Run Report. A new window will open. See Figure 42.

   Figure 42

3. Choose the format type for the report (PDF, text, Excel, Web).
4. In the Date filter, enter the time frame you would like the report to display.
5. In Groups, check the workers or work groups you would like the report to include.
6. Click OK. The report will appear in an expanded window.
Report types.

+ Alert Report
  > Includes all of the alerts that fired for all company workers in the current group and Date/Time filter. The report displays the name of the user who fired the alert, as well as the group, alert type, alert description, the alert message, and the date and time the alert was fired.

+ Customer Report Card
  > A graded summary of how well workers are using their mobile application. Users are graded by the number of errors during the specified period of time. Mobile-worker errors include low battery, GPS restrictions, not logging out, and not ending a timecard shift.

+ Device Tab Export
  > Displays all the information from the Devices tab in a reportable/printable format.

+ Fleet Daily Timesheet
  > An overview of how each worker’s time was spent throughout the day. It will show what time workers started the day, how many stops they made, mileage driven each day, how many hours they logged, and what time workers ended their day.

+ Fleet Timecard Detail
  > Run for any time period for a group or company, this report details for each worker all timecard actions performed, shift summary, information of pay hours, break time, and estimated mileage. The total pay hours, break time, and mileage are aggregated for each worker for the specified time period of the report.

+ Fleet Trip Report
  > A summary of the percentage of time workers spent traveling and the percentage of time they spent at a location. Under the Stop Information header, it displays the number of stops, the total time stopped, and the average time at each stop. Under the Travel Information header, it displays total time traveled, average time traveled to each stop, total distance driven, and the average distance between each stop.

+ Fleet Weekly Timesheet
  > Displays each worker’s hours for a week or week(s) specified in the Date/Time filter. It also displays the number of stops, average amount of time spent at each stop, mileage driven, and pay hours.

+ Job Summary
  > The average scheduled duration of a job and the actual duration of that job and what actions have been taken for that job, such as In Transit, Complete, and so on.

+ At a Glance Report
  > What if keeping track of the key performance indicators of your company was as easy as reading an email? Now, it’s that easy! A new standard reports that provides the Web portal users with all of the key performance metrics measured by the Field Force Manager application.

+ Location Stop Report
  > An overview of each worker’s number of stops, duration at each stop, and travel time and mileage between stops that day. It also lists the address of each stop, so you can see whether a worker stopped at a prohibited or unknown location.

+ Users Tab Export
  > Includes all the information from the Users tab in a reportable/printable format.

+ Worker Activity Log Report
  > Summarizes the activities found in the Worker Activity Log for all workers in the current group and as specified by the Date/Time filter. The report also includes the location information and address for each activity.
Worker Summary

- Displays the number of jobs per worker, average duration of each job, how many jobs the worker completed late, and the percentage of jobs that are completed late. It then combines these totals for all workers so you see, for example, the percentage of jobs that are not completing on time.

Worker Timesheet/Stop Report

- Modifies the existing Worker Daily Timesheet report and allows you to run the report for multiple workers across multiple days. The report displays the Worker Daily Timesheet report for all workers in the current group filter and the stops and payroll information for the date and time range for each worker.

Configurable reporting.

(Only available in Basic and Premium packages.)

Web users have the ability to configure custom reports for their companies from within the Web application. Users can choose from more than 30 data views to create new reports of their choosing or modify an existing report to highlight a specific fact. This includes selecting the columns, column order, summary information, criteria, grouping, and ordering for each report.

Creating a report:

1. Select the Reports tab.
2. Click Create Report. A new window will appear. See Figure 43.

3. Enter the name of the report you're creating.
4. Choose the category of information you would like to report on. Most information in the Field Force Manager application falls under the Worker category.
5. Choose a subcategory. The subcategory allows you to choose from predefined data views. Many of the data views are named after existing standard reports.
6. Choose the report type
   a. Tabular—Gives a grid list of all data items.
   b. Summary—Allows information to be summarized and grouped.
7. Click **Next** to go to the Column setup page, which allows you to select the columns of information to display on the report.

8. Check the box next to the columns you would like the report to display.

9. Click **Next** to go to the Summarize setup page, which allows you to choose the fields to summarize. 
   See Figure 44.
   
   a. Summary types include Sum, Average, Largest Value, Smallest Value, and Count. (Note: The application will only allow specific summary fields dependent on the type of summary desired.)
10. Choose the field(s) you would like to summarize on the report. (Note: Summary is optional and only recommended for Summary reports.)

11. Click Next to go to the Column Order setup page, which allows you to choose the order of the columns in the report from left to right. See Figure 45.

![Figure 45](image-url)

12. Select a field and use the up and down buttons on the screen to change the order columns will appear on the report.

13. Click Next to move to the Criteria setup page, which allows you to specify criteria or rules in determining which value will appear on the report. See Figure 46.

   a. A report can have several criteria for each report. To add additional criteria, click New Field. Then choose the data type, data operator, and value to evaluate against. Once you have completed setting up criteria, click Apply to add the criteria to the report.

![Figure 46](image-url)
14. Click Next to move to the Who setup page, which allows you to specify which groups the report will cover. See Figure 47 (Note: The report must have at least one group selected.)

15. Click Save. The report is not saved until the window is closed. To run the report you just created, click the name of the report in the report list.

**Scheduled reporting.**

(Only available in Basic and Premium packages.)

Web users now have the ability to schedule reports to run and deliver via email automatically to users within the company. You can schedule automatic reports on a daily, weekly, or monthly basis. You can also configure the date and time, group, report format, and scheduled period for the report. The report will be generated and delivered at the scheduled time.

**Scheduling a report:**

1. Select the Reports tab. Select the report you want to schedule from the list. An options menu will appear.
3. Enter the name of the report you’re scheduling. The report will appear in the list on the Reports tab once the scheduled report has been saved.
4. The Range setup page allows you to choose the Date/Time filter for the report. It works the same as the Date/Time filter in the Web portal application. See Figure 48.
   a. The report can be scheduled with a fixed or relative date filter. A relative date filter for scheduled reports is recommended.

5. Click Next to go to the Who setup page, which allows you to specify the groups to be included in the report. See Figure 49. (Note: The report must have at least one group selected.)
6. Click **Next** to move to the Schedule setup page, which allows you to specify a recurring report schedule. See Figure 50.

   a. You can schedule reports to run:
      i. Daily—Either every x days or every weekday.
      ii. Weekly—Every x weeks or a specific day of the week.
      iii. Monthly—Every x day of x month or a specific day of the week every x months.
      iv. A specific time of day. (**Note:** Reports will be queued to run at scheduled times. Exact delivery time is determined by system load and email timing.)
      v. After a specific end date or no end date.

![Figure 50](image)

7. Click **Next** to move to the Send setup page, which allows you to specify report recipients, delivery format (PDF, Excel, TXT, or email), and the page orientation of the report. See Figure 51.

![Figure 51](image)
Exporting reports.

The Export button allows you to export job, timecard, and form data directly to Excel format. See Figure 52.

Figure 52

+ **Job Type Export**
  - Provides detailed job information, address, and actions.

+ **Timecard Export**
  - Allows timecard information to be edited and automatically summarized for each shift and pay period.

+ **Form Export**
  - Provides date and time, location, user, action, job, timesheet, and all field information for each form completed.

+ **Pay Hours and Forms Export**
  - Allows a user to report pay hours and field information associated with the pay period. The report displays all workers’ pay shifts, name of user and screen username, group, pay hours, break hours, Start Shift and End Shift locations, and any field that was filled out in a form attached to Start Shift or End Shift actions.
Administration.

The Administration section allows you to configure and set up many aspects of the Field Force Manager application.

Users list.

The Users tab will display a list of all the users set up on your company’s account. See Figure 53.

Creating a new user:

The Create User interface allows you to add users to the system.

1. Select the Users tab
2. Click Create User. A new window will open.
3. Enter the user’s information, including first and last name, group assignment, security group assignment, time zone, username, and password. All fields are required.
Editing an existing user.
1. Select the Users tab.
2. Click the name of the user you want to edit. An options menu will appear. See Figure 54.

Figure 54

3. Select Edit User. A new window will open. See Figure 55.

Figure 55

4. Make desired changes and click Save.

Deleting an existing user:
1. Select the Users tab.
2. Click the name of the user you would like to delete. An options menu will appear.
4. A confirmation window will appear. Click OK.
Uploading users:
1. Select the Users tab
2. Click Upload Users
3. Click Get Template to download the user upload template.
4. Unzip XLS, CSV, and TXT files to your computer.
5. Enter users into an XLS or CSV file. Save the file.
6. Click Browse on the Upload Users screen. Select the file to be uploaded. See Figure 56.
7. Check Update Records if you want to update existing records with the new information.
8. Click Submit

The following information can be uploaded for a user:
+ First name (required)
+ Middle name
+ Last name (required)
+ Preferred name
+ Group (required, must match an existing group name)
+ Security role (required, must match existing security role)
+ Time zone (required, must be valid time zone)
+ PIN (required, must be a four- to 10-digit, unique number for the company)
+ Username (required, must be unique for the company)
+ Password (required)
+ Street address
+ Apartment or suite number
Devices.
The Devices tab displays a list of all the devices that were configured within your Web portal account during setup. To add new devices to your system, contact your Verizon Wireless business specialist to purchase additional licenses.

Editing a device:
1. Select the Devices tab.
2. Click the name of the device you would like to edit. An options menu will appear.
4. Make desired changes and click Save.

Deactivating an existing device:
You will only deactivate and reactivate a device if it is lost or damaged and you need to put Field Force Manager on another device. Deactivating a device will log the mobile worker out of the phone and clear all data from the handset.
1. Click the Devices tab.
2. Click the name of the device that you would like to deactivate. An options menu will appear.
3. Select Deactivate Device.
4. A confirmation window will appear. Click Yes.

Note: Deleting a user or deactivating a device from the Web portal will not deactivate the service. You will still be charged monthly access for that user. To cancel the service, please contact Verizon Wireless Customer Service at 1.800.922.0204.
Groups.

Groups are used to organize your mobile workers based on your company divisions, markets, and territories. Groups allow you to filter and organize workers and jobs. See Figure 57.

Parent groups.

When creating or editing a particular group, a parent level can be specified. This allows you to create visual levels within groups, displaying group tree structures when selecting filters for various features within the Web portal. See Figure 58. Parent levels do not affect configurations, settings, or preferences for users or their devices within their groups. Configurations, settings, and preferences still need to be set separately for each individual group.

Creating a new group:

1. Click the Groups tab.
2. Click Create Group. A new window will open.
3. Enter a group name.
4. Choose the parent group name (or No parent group if none is wanted). See Figure 59.

![Create Group](image)

Figure 59

5. Click Save.

**Editing an existing group.**

1. Select the Groups tab.
2. Click the name of the group you would like to edit. An options menu will appear. See Figure 60.

![Edit Group](image)

Figure 60

4. Modify the name and/or parent group.
5. Click Save.

**Deleting an existing group:**

1. Select the Groups tab.
2. Click the name of the group you would like to delete. An options menu will appear.
4. A confirmation window will appear. Click OK.
Location types.
The Location Types tab will allow you to customize and configure the location types and icons for your company. See Figure 61.

Creating a new location type:
1. Select the Location Type tab.
2. Click Create Location Type. A new window will appear.
3. Enter the location type name. If this is a prohibited location, check Prohibited.
4. Select an image by using the left and right arrows.
5. Click Save, or click New to create another location type.

Editing an existing location type:
1. Select the Location Type tab.
2. Click the location type you would like to edit. An options menu will appear. See Figure 62.
3. Select Edit Location Type. A new window will open.
4. Modify the information and click Save.
Deleting an existing location type:
1. Select the Location Type tab.
2. Click the location type you would like to delete. An options menu will appear.
3. Select Delete Location Type. A new window will open.
4. Assign the locations of the location type you are deleting to a different location type. (If there are no locations assigned to the location type you are deleting, you will only see the delete confirmation box).
5. Once the locations are assigned to a new location type, click OK.

Alerts tab.

An alert is an automated message to a user or group that is triggered by a predetermined rule, such as when a worker exceeds the speed limit or enters and leaves a location. Alerts are configurable and can contain one or more criteria-based rules. Alerts allow a company to proactively monitor and manage mobile workers by automating messages and making sure that those messages get to the right users. The First-time Setup Wizard will preinstall alerts for speeding, long stops, and prohibited stops in your account. These alerts can be modified by editing the alert from the Alerts tab.

The Field Force Manager alerting system is based upon an event-condition-action model. The alerting system can alert upon the following types of events:

+ Reactive events (alert is triggered when event happens)
  » All packages:
    - GPS event (speeding, geofence violation)
    - Stop/travel event (long stop, stop at prohibited location)
    - Login/logout event (starting shift too early)
  » Basic and Premium packages:
    - Timecard event (starting or ending shift at the wrong location)
    - Ad-hoc form event (filling out a form with a specific value)
  » Premium package only:
    - Job status event (notification of job completion)
    - Job attribute event (a job having a specific value)
    - Job create event (notice of a new job)

+ Proactive events
  » Worker monitoring alerts
    - Managers can now monitor worker compliance and field performance via proactive alerts. Every 15 minutes, the system will monitor and alert upon a user’s activities, such as:
      » No communication in over an hour
      » No GPS in over an hour
      » Not logging in or out of the application on time
      » Not starting or ending a timecard shift on time
      » Having a shift that is too long (no breaks)
      » Working more than 40 hours in the past seven days
Job monitoring alerts (Premium package only)

- Managers can now monitor job status, schedule, and start and end times via proactive alerts. The alerts can notify a manager of:
  - Jobs not started by their scheduled start time
  - Jobs not completed by their scheduled end time

Viewing a fired alert:

1. Select the Alerts tab.
2. Click the alert you wish to view in the Fired Alerts list. An options menu will appear. See Figure 63.

![Figure 63](image)

3. Select View Alert. A new window will open, showing the worker’s name, action that triggered the alert, and the date and time it happened. See Figure 64.

![Figure 64](image)

Deleting a fired alert:

1. Select the Alerts tab.
2. Click the alert you would like to delete. An options menu will appear.
3. Select Delete Alert.
4. Click OK to confirm the deletion.
Alert configuration list.

The alert configuration list allows you to create, edit, and delete alerts. See Figure 65.

Creating alerts:
1. Select the Alerts tab.
2. Click Configuration List.
3. Click Create Alert. A new window will appear. See Figure 66.

4. Enter a name for the alert—for example, Speeding.
5. Give a description—for example, Exceeding the speed limit of 65 mph.
6. Check Active. If the box is unchecked, the alert will not be activated.
7. Select an event type.
8. Click Next.
9. Click New Rule. See Figure 67.

![Figure 66](image)

10. Select an attribute type to alert on, such as GPS.
11. Depending on the attribute type you select, the field option below will change to either Data or Operators. Select one of the options from the drop-down menu, such as Speed.
12. Select a value, such as Greater Than, and click Apply. Repeat steps 9 through 12 to add more than one rule to an alert.
13. Once you have input all rule data, click Next.
14. Select the group or workers that this alert will apply to. See Figure 68.

![Figure 67](image)
15. Click Next.

16. The schedule window allows you to set the times and days that the alert can be triggered. If left blank, it will default to 24 hours a day. See Figure 69.

17. Click Next.
18. Type in a subject and message, and check **Notify Triggering Worker** if you want the alert sent to the worker who triggered the alert. The Recipient window is where you can select the **data type** in the alert so when the alert is triggered it will read [Worker’s username] was exceeding [GPS Speed]. See Figure 70.

![Create Alert](http://example.com/createalert.png)

**Figure 70**

19. Select the names of the people who will be informed when this alert is triggered. The method of alert is configured in the User edit screen. No alert will be sent to a worker if the notification preference and address is set to not accept alerts.

**Editing alerts:**

1. Select the **Alerts** tab.
2. Click **Configuration List**.
3. Select the **alert** you would like to edit. An options menu will appear. See Figure 71.

![Alert Configuration](http://example.com/alertconfiguration.png)

**Figure 71**

4. Select **Edit Alert Configuration**. A new window will open.
5. Modify the alert as desired.
6. Click **Next** to review the other steps or click **Save** to exit.
Deleting alerts:
1. Select the Alerts tab.
2. Click Configuration List.
3. Select the alert you would like to delete. An options menu will appear.
4. Select Delete Alert Configuration.
5. Click OK to confirm the deletion.

Geofences.
The Web portal provides you with the ability to configure custom geographic regions. These geofences are used to alert a worker or a manager that a mobile worker is going in or out of an area. For example, you could create a geofence around an entire state or around one particular stretch of highway. To set up a geofence, you must first create a geofence and then create an alert for the geofence.

Creating a geofence:
1. Select the Geofence tab. See Figure 72.

2. Click Create Geofence. A new window will open.

3. Enter a geofence name, description, and group assignment.
4. Enter a street address, city, state, or ZIP code. Click Find Address. The system then presents you with a map of that area, allowing you to create a circular or polygonal geofence.
5. To create a circular geofence, click Circle. Then click the map once in the center of the desired geofence location. Finally, click the mouse at the outside edge of where you want the geofence. Click Save. See Figure 73.
6. To create a defined polygon, click Polygon. Then click on the map where you want the points to appear. Once there are three or more points on the map, Field Force Manager will automatically connect them. If you make a mistake or would like to alter the polygon, you can move a point by clicking on it, and then clicking the new location on the map. When done, click Save.

7. Select geofence color if you would like a color other than the default blue. This color will be used to display geofences on the map.

8. When done, click the Save button.

**Editing a geofence:**

1. Select the Geofence tab.
2. Select the geofence you would like to edit. An options menu will appear. See Figure 74.

4. Modify the geofence as desired.
5. Click Save.
Deleting a geofence:
1. Select the Geofence tab.
2. Select the geofence you would like to delete. An options menu will appear.
4. Click OK to confirm the deletion.

Web users can choose to display their geofences on maps by choosing geofences from the Display filter. The name of the geofence can be turned on or off using the label filter that is found within the Display filter.

Security roles.
(Only available in Basic and Premium packages.)

Administrative users of the Web portal now have the ability to create, edit, and delete various security roles for their companies. Each role can be configured to access certain functionalities and work groups. Administrators for companies with multiple divisions can restrict access for individual users to specific divisions or a single division. Access to sensitive reports and functionalities can also be granted or restricted on a role-by-role basis. The Web portal does have several default roles built in, such as Operations, Mobile Worker, Company Administrator, and Super User. See Figure 75.

Creating a role:
1. Select the Roles tab.
2. Click Create Role. A new window will open.

3. Enter a name for the role
4. Select the group that it will be associated with.
5. Select the permissions you want associated with that role.
6. Click Save. See Figure 76.
Editing a role:
1. Select the Roles tab.
2. Select the role you would like to edit. An options menu will appear. See Figure 77.

3. Select Edit Role. A new window will open. (If it's a built-in role, you will receive a warning that a global role cannot be edited. In this case, copy the role first and then edit it.)
4. Select the new group or permissions that you want associated with this role.
5. Click Save.

Deleting a role:
1. Select the Roles tab.
2. Select the role you would like to delete. An options menu will appear.
3. Select Delete Role. (If it's a built-in role, you will receive a warning that a global role cannot be deleted.)
4. A confirmation window will appear. Click OK.
Copying a role:
1. Select the Roles tab.
2. Select the role you would like to copy. An options menu will appear.
3. Select Copy Role. A new window will open.
4. Enter a name for the copied role.
5. Make the desired changes to the group or permissions.
6. Click Save.

Job type configuration.
(Only available in the Premium package.)
Configuration of job types can be performed for each company using the Job Type tab. Configuring a job type allows you to customize and extend the information that is sent to a mobile worker upon job dispatch. It can include the actions and workflow a worker follows while completing a job and the forms that a worker should complete during the job process.

Job Type tab.
The Job Type tab allows you to create and edit job types associated with your company. See Figure 78.

Creating a job type:
Administrative users can create, edit, and copy existing job types using the Job Type Configuration Wizard. A job type is a template from which jobs are created. The configuration of the job type allows the administrator to configure the template to meet the needs of the business.
Setting up a job type:
The first step in setting up a job type is specifying some basic information. See Figure 79.

- **Name:** The name of the job type is how the job type will be referenced when a user is prompted to choose which template to use when creating a job.

- **Default Duration and Units:** These two fields allow the default duration to be set for a job template. The default duration is used to set the scheduled end date and time of a job when the scheduled start date and time is specified, but the scheduled end date and time is not set.

- **Inner Label and Outer Label:** Setting these values with the following field names will display the data element as an inner or outer label on the map icon. Multiple data elements can be displayed within each label.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>start</td>
<td>Scheduled start date and time</td>
</tr>
<tr>
<td>end</td>
<td>Scheduled end date and time</td>
</tr>
<tr>
<td>actual start</td>
<td>Actual start date and time</td>
</tr>
<tr>
<td>actual end</td>
<td>Actual end date and time</td>
</tr>
<tr>
<td>statusDescription</td>
<td>The description of the job status (i.e., In Transit)</td>
</tr>
<tr>
<td>categoryCode</td>
<td>The description of the job's category code</td>
</tr>
<tr>
<td>customerTypeCode</td>
<td>The description of the job's customer type</td>
</tr>
<tr>
<td>Latitude</td>
<td>The latitude of the job's address</td>
</tr>
<tr>
<td>getAttribute('X')</td>
<td>Displays the value of job detail X</td>
</tr>
</tbody>
</table>

- **Active:** This setting controls whether or not the job type is available to be used to create new jobs.

If job alerts or reports utilize job type-specific information such as detail- or action-specific reports or alerts, you will need to update the alert or report configuration if the job type is ever changed.

Figure 79
Creating job type details:
The second step in creating a job type is to set up the details that can be sent to a mobile worker or displayed on the Web portal. Each job type can have many job details, and for each job detail the following information can be specified. The order the job detail appears in the list will control the order it appears on the Web portal and on the device. See Figure 80.

+ **Detail Name:** The name of the detail. This is the label that will appear next to the detail on the Web portal and on the device. This is how the detail will be referenced in the integration as well.
+ **Detail Type:** The type of detail.
+ **Text:** Four thousand characters of text.
+ **Default Value:** The default value a detail will have if not specified during job creation.
+ **Required:** Shows whether the detail is required to be populated when a job is created.
+ **Show on Device:** Shows whether the detail will be displayed on the detail screen of a job on the device.

![Figure 80](image)

Creating job type actions:
The third and final step in creating a job type is to set up the job actions. Each job type must have one or more actions that allow a worker to update his status, complete or delete a job, fill out a job form, place a phone call, or print a print string. For each action the following information can be specified. The order the action appears in the list will control the order of workflow on the device. See Figure 81.

+ **Action Name:** The name of the action and how it will appear on the device and the Web portal. The action name will update the status description of a job when the action is performed.
+ **Repeatable:** Shows whether the action can be completed twice during the same job.
+ **Required:** Shows whether the action is required to be completed before additional actions can be performed.
Timer Option:
- **Start/Resume Job** — This starts or resumes the job duration timer.
- **On Hold** — Pauses the job duration timer until another Start/Resume Job action is performed.
- **Terminate Job** — Completes the job duration timer and marks the job as completed or terminated. Terminated jobs cannot be reopened or reassigned.
- **None** — An action configured with this option will not change the status of the job timer. This is useful for Accept, Reject, Call, or Print actions that should not affect the actual job duration.

+ **Form Attached**: Allows you to choose a form to be attached to the job action and presented to the mobile worker when the action is performed.
+ **Delete on Device**: Shows whether the action will remove the job from the device upon completing the action.
+ **Delete on Server**: Shows whether the action will delete the job on the server. (Note: The job is deleted so it cannot be viewed anymore.)
+ **Print**: This feature is not currently supported and will be ignored.
+ **Call**: The device will call the number entered into the associated job detail when the action is performed.

Forms.

(Only available in Basic and Premium packages.)

The Forms tab contains a variety of forms that allow workers to collect data in the field. See Figure 82. Each form can have multiple fields for different types of data collection, and can be made available to the specific groups that need them. Forms can be configured in three formats:

- **Standard forms**: These forms are accessible through the Forms menu on the mobile phone. The user can enter data in the fields and then transmit the form back to the Web portal.
- **Timecard forms**: These forms are accessible through the Timesheet menu on the mobile phone. This allows a company to collect valuable information when a worker begins or ends a shift (for example, the beginning odometer reading, truck number, or ending odometer reading).
- **Job forms**: These forms are accessible through a Job Action on the mobile phone. Job forms can be configured in the Field Force Manager Premium package only.
Creating a form:

1. Select the **Forms** tab.
2. Click **Create Form**.

3. Enter a **name** and **display name** for the form. See Figure 83.

4. Click **Next** to go to the Fields Setup screen. See Figure 84.
5. Click New Field
   a. Enter a field name
   b. Enter a label.
   c. Choose the field type:
      i. Text—Allows text or number entry.
      ii. Number—Only allows numbers.
      iii. Select List—Values must be separated by a comma.
      iv. Checkbox.
      v. Money.
      vi. Picture Capture.
   d. Choose the maximum field length.
   e. Optional:
      i. Choose whether the field is required or not.
      ii. Choose a default value for the field.
   f. Click Apply to add the field to the form.
6. Add more fields as necessary.
7. Click Next to go to the Deploy Setup screen. See Figure 85.

8. To activate the form:
   a. Check the Active Form box.
   b. Check the Available on Forms Menu box to make the form available from the forms menu on the phone.
   c. To attach the form to a timecard action, check the box next to the action of your choice.
   d. Check the appropriate groups to make the form available to them.
9. Once complete, click Save. The form will be sent to the phone once the phone user receives a new job, message, or location. It will also be sent if the user forces the phone to communicate (by pressing *#) or logs out and back in.

Editing a form:
1. Select the Forms tab.
2. Select the form you would like to edit. An options menu will appear. See Figure 86

4. Make any necessary changes to the form.
5. Click Save when completed.

Deleting a form:
1. Select the Forms tab.
2. Select the form you would like to delete. An options menu will appear.
3. Select Delete Form.
4. Click OK to confirm the deletion.

Workflow.
(Only available in the Premium package.)
The Field Force Manager application can take action on mobile worker events and monitors. The application can also automatically perform actions for users upon specified criteria. The system can take the following actions upon specific system events:
+ Create jobs
  » Examples: Create Job Form, Create Job upon Job Completion, Create Job upon Stop at Location
+ Perform job actions
  » Examples: Start Job upon Stopping at Job Location, Start Job upon Creation
+ Perform timecard actions
  » Examples: Start Shift upon Arriving at Customer Location, End Shift upon Leaving Customer Location
+ Create or update locations
  » Examples: Create Location Form, Create Location at Unknown Stop

Giving a user access to workflow rules:
The Web user must be configured to have access to the workflow rules. By default, only the company administrator role has access to workflow rules.
1. Select the Users tab.
2. Edit the user who will have access.
3. Choose Company Administrator or a custom role with the workflow permission added.
4. Save the user information.
5. Log in to the Web portal as the updated user with workflow permissions.

Creating a workflow:
Creating a workflow is similar to creating an alert; in fact, the two functions are based upon the same technology. The core difference is that when configuring a workflow, the last step is choosing what type of action to take instead of choosing the content of the message you would like to send.
1. Select the Workflow tab.
2. Click Create Workflow. A new window will open.
3. Name the workflow.
4. Choose the type of event you would like the workflow to react to.
5. Choose the rules that will define when the workflow is triggered.
6. Choose the groups of workers the workflow rules should be performed against.
7. Choose the schedule, days, and times when a workflow rule should be enabled.
8. Choose the action you would like to take upon the workflow being triggered. To perform the action, specific pieces of information are required.
   a. Create Job
      1. Job Type Name—Name of the job type that will be created.
      2. Job Reference Number—A reference number will be generated automatically if this is not provided.
   b. Submit Job Action
      1. Action Name—The name of the action to be performed.
      2. Worker Username—The username of the user who performed the triggering action.
      3. Coordinate—The coordinate of the triggering action can be configured to be the coordinate of the action being performed.
   c. Submit User Action
      1. Action Name—The name of the action to be performed.
      2. Start Shift, Start Break, End Break, and End Shift are the valid options.
      3. Username of user to perform the action.
      4. Most often configured as the username of the worker who performed the triggering event.
      5. Coordinate—The coordinate of the triggering action can be configured to be the coordinate of the action being performed.
   d. Create or Update Location
      1. Location Reference Number—The reference number of the location to be created or updated.
      2. Location Name—The name of the location to be created.
      3. Coordinate—The coordinate of the triggering action can be configured to be the coordinate of the location being performed.

9. Save the workflow. The workflow rule will now be published to the servers. It can take up to 10 minutes for a published workflow to take effect.

**Settings.**

**Hours of operation.**

A Web portal administrator can configure the hours of operation for an entire company, a group, or a specific user. See Figure 87. By default, the mobile phone will collect GPS information 24/7 while the Field Force Manager application is running. If a worker remains logged in to his mobile phone after the set hours of operation, the mobile phone will stop collecting GPS and communicating until the next day. If a user logs in or performs a timecard or job action, the mobile phone will resume GPS collection and communication until the next day’s “On” hours of operation or for a set number of hours. Hours of operation are used to control GPS collection and auto-application startup.
Allow/Ask/Deny settings.
These settings will only control privacy settings on handset devices released after May 2009. For older handset devices, those settings must be set on the device.

Company settings.
+ Auto Launch to Background
  » Causes the application to automatically suspend after the application is started. The application will remain in the foreground for three seconds prior to moving to the background.
+ Auto Shutdown after Hours of Operation
  » Causes the application to automatically exit at the end of a user’s set hours of operation. The application will end a shift for a user if he is currently on duty. This preference is not recommended if the user uses the application for forms, timesheets, or jobs.
+ Auto-Application Startup
  » Causes the server to send an SMS message to start the application during a user’s set hours of operation. The SMS message will be sent if the mobile phone has not communicated with the server in an hour and five minutes.
+ First-time Setup
  » Controls whether the next user to log in to a company’s account will be prompted to fill out the First-time Setup Wizard. If the preference is set to true, the next Web user to log in to the Web application will be presented with the setup wizard. This preference is set to false after a user completes the setup wizard.
+ Map Style
  - Allows Web users to choose which of the many map styles to display in the Web portal.

+ Options Menu Code
  - Allows a company to set the access code that prevents access to the "+9 menu on the mobile phone. The default code is 4321.

+ Suppress Device Notifications
  - Suppresses all modal dialogs to the mobile worker. This will prevent the user from being notified of new or updated jobs, locations, and messages.

+ GPS Collect and Send Rate Preferences
  - Users can now control the GPS collect and send rates via new company preferences in company settings.
  - GPS polling interval (seconds). This preference will allow GPS collect rates to be set to down to 60 seconds (from the default of 120).
  - Minimum GPS points per datagram. This preference will allow the upload rate to be set down to one GPS point (from the default number of 14 or 28 points to be collected before they're uploaded).

Note: Lowering these settings will dramatically reduce the battery life of the phone running Field Force Manager. A car charger is recommended for user running Field Force Manager.

Auto-application startup.
Field Force Manager has the ability to remotely start the mobile application. Auto-application startup is designed to automatically keep the Field Force Manager application running during your company’s defined hours of operation. The Field Force Manager application can also be started on demand using the Remote Start button on a Worker Map or the Users tab. Field Force Manager customers will not be charged for the auto-application startup messages being sent to the mobile phone.

To enable auto-application startup, the setting must be changed to True. The default setting for this preference is False. Next, the hours of operation must be set. Setting up the desired hours of operation lets the application know when to automatically send a message to the mobile phone to turn on for the day. The server will also monitor the application throughout the day to ensure that it remains on. The server will restart any mobile phone that has not communicated with the server in an hour and five minutes. If a worker has not started the application or logged in after some time, the application will send a message to restart the application and log the user back in. The mobile phone must be turned on for the application to be restarted.

Web users can also start up a user's mobile phone on demand by going to the Worker List or User tab and clicking on a mobile worker’s name. Press the Remote Start button when the options menu appears. Manually remote-starting a mobile phone will ignore the worker’s hours of operation, start up the Field Force Manager application, and start collecting GPS points.

Note: Auto-application startup uses SMS message to start up the application. If the account has SMS messages blocked, the feature will not work. Manually pressing the SMS Remote Start button will send one SMS message to the device. The Web portal will not send another start message until the application communicates with the server or until 24 hours passes.
Support and Training

Support.

To get support for Field Force Manager, click on the Support link in the upper right-hand corner of the Web portal. See Figure 88.

Training.

To get training for Field Force Manager, click the Training link in the upper right-hand corner of the Web portal. See Figure 88.

Did You Know.

In the bottom left-hand side of the Web portal, you will find the Did You Know box. This area contains helpful hints and shortcuts to make your Field Force Manager experience even more enjoyable. To learn more about a specific suggestion given in the box, follow the link it mentions. See Figure 89.
Glossary

Activity
Events a mobile worker enters into a handheld mobile phone while logged into Field Force Manager. Activities include starting and ending shifts, starting and ending breaks, logging in and out of Field Force Manager, and completing ad-hoc forms. All activities are recorded on a worker’s activity log.

Breadcrumb trail
A visible collection of a worker’s GPS points over a specific time frame, represented by circular, blue icons on the map. In this way, you can track where your workers have been. Each point on the map will also give you information about how fast the worker was traveling at the time the point was collected.

Device
Any device or other hardware equipped with the Field Force Manager software. Devices are added to the Field Force Manager Web portal by Verizon Wireless as part of the setup process. You can edit the user description to more accurately describe who is using the device.

Filter
A means of controlling what information is displayed in the Web portal content frame. Specifying a date range in the Date/Time filter, for instance, instructs the Web portal to display only the information gathered during that time frame. You can also filter out group, location, worker, and activity information.

Fleet
A company’s collective group of mobile workers.

Forms
An Administration function that allows administrators to create custom forms available for mobile workers to fill out and send directly from their phones. These forms will either be available on the phone’s Forms menu or they can be set up to automatically execute when a worker performs a timesheet or job action.

Geocode
The map coordinates that the Web portal generates from an address. Map coordinates can be overridden.

GPS point
The location of a mobile worker at a specific date and time. GPS points are collected by the mobile phone and sent to the Field Force Manager Web portal.

Group
Worker subdivisions within a company set up by the company administrator. When a new user is created, he or she will be assigned to a work group.

Hyperlink
Blue, underlined text that you may click on to be taken to more information about that subject.

Jobs
Activities that are assigned to mobile workers via the Field Force Manager Web portal. Jobs can be edited or reassigned as situations change. Field Force Manager features standard, default job types that are also configurable, so you can send workers precisely the information they need to complete the job. Field Force Manager then dispatches job information from the central office to workers in the field. Job information is displayed on workers’ handheld mobile phones.
Field Force Manager has both Basic and Premium job functionalities:

Basic:
- Simple job dispatch from the Web portal to mobile user. The mobile user can read details of the job, call ahead to the job contact, and obtain text-based driving directions to the job. When the user completes the job, the job is deleted from the mobile phone and from the Web portal.

Premium:
- Web portal users can:
  + Use advanced job dispatch.
  + Link jobs to known locations in the system, reducing data entry errors.
  + View all jobs or a single job on all maps.
- Mobile users can:
  + Read details of the job.
  + Call ahead to the job contact.
  + Obtain audible and map-enabled driving directions to the job.
  + Update the job status to Accept, Reject, In Transit, Start, On Hold, or Complete.
  + Fill out and send a job completion form. Once a job is complete, the history can be viewed from the jobs list or via the location job history.

**Location**
Known work or nonwork sites that you can create and edit in the Web portal. By doing so, you can match worker stops to actual landmarks. By sending a location to your workers, you can provide them with driving directions from their current position to that specific landmark.

**Location type**
Categories of locations set up by company administrators to distinguish certain landmarks. Typical location types might include company, customer, general, prohibited, and vendor.

**Maps**
Geographical images that provide a backdrop to show where workers and jobs are located.

**Messages tab**
A tab in the Operations section of the Web portal where dispatchers can send electronic messages to their workers in the field.

**Options menu**
The menu that opens when a user clicks on an item in a list. The rest of the screen will fade to gray until an option is chosen or the user exits out of the menu.

**Preferences**
Can be accessed from the blue hyperlink at the top of the Web portal screen. Both Administration and Operations users may adjust user preferences, which will only apply to that specific user. Administrators may also change company preferences, which affect all users in the company.

**Prohibited**
A location that has been designated as a forbidden location type for a worker to visit during a shift.
Reports tab
On the Reports tab, you have the choice of viewing and exporting several different reports. These reports list information regarding hours worked, location stop times, timesheet actions, travel times, etc. These reports can be adjusted to display information over any time frame you designate in your Date/Time filter.

Settings tab
Located in the Administration section, this is where company administrators can set hours of operation and overtime/double overtime rules.

User
Any employee using Field Force Manager; users include mobile workers, administrators, and dispatchers. Users are created and assigned to a work group by company administrators.

Web portal
The Web-based component of Field Force Manager. The Web portal allows dispatchers and managers to view worker locations and job status so workers can be dispatched in the most efficient manner. It also provides individual worker reports and lets you review all worker activity. The Web portal has both an Administration section and an Operations section.

Worker
Any employee using the Field Force Manager software on a phone out in the field.