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1. General Information

1.1. System Requirements

- Internet access - High speed internet access is recommended to access the Field Force Manager Web Management Application.
- Browser - Internet Explorer 7 and above and Mozilla Firefox 14 and above and Google Chrome.
- A screen resolution of 1024X768 or higher is recommended.

1.2. Privacy & Mobility

Field Force Manager (Field Force Manager) takes the matter of individual privacy very seriously. Customers using Field Force Manager must obtain the authorized consent of any individual affected by use of the service. Field Force Manager will only collect, use, and transmit information when the mobile phone is on and the Field Force Manager Mobile App 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 they must “EXIT” the mobile application. The Field Force Manager application is solely intended for lawful business use. Location information is not guaranteed to be accurate.

1.3. Support & Training

The easiest way to access Field Force Manager support and training is through the Support and Training Links on the upper right hand corner of your Field Force Manager Web Management Application.

1.4. Copyright Information

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All other marks are property of their respective holders.
2. Introduction

Field Force Manager is an enterprise mobile business management tool that gives you the ability to track the location of your mobile resources in real time, to manage Mobile Timesheets and workflows and to collect data in the field. This User Guide will help you understand various features of this product.

2.1. What is Field Force Manager (FFM)?

Field Force Manager is an enterprise mobile business management tool that gives you the ability to track the location of your mobile resources in real time, to manage Mobile Timesheets and workflows and to collect data in the field. The mobile app connects to network provider’s nationwide data network to allow real-time tracking and monitoring of your mobile workforce. The secure cloud-hosted web application, which can be accessed from any supported web-browser, allows you to visualize the data and report of it. Powerful webservice API’s also gives you access to this data.
3. At a Glance

3.1. Track Mobile Workers

Field Force Manager’s mobile app allows you to track, manage and pull report of your mobile workforce. The service provides accurate, real time GPS tracking, web-based maps and reports (breadcrumb reporting, including latitude/longitude, speed, directional heading) for current and historical location.
3.2. Mobile Timesheets

Field Force Manager’s mobile app allows your mobile workforce to perform their daily shift and break events on their phone. The cloud based web application allows you to pull corresponding Mobile Timesheets report.

3.3. Mobile Jobs

Field Force Manager Mobile allows you to send jobs to mobile workers in the field. Your mobile worker also has the ability to receive and perform several job actions on their GPS enabled phones.
3.4. Mobile Forms

Field Force Manager Mobile gives you the opportunity to reduce the paperwork by collecting your mobile user data on the phone. You can create forms and assign to your field workers from the Field Force Manager web application.
3.5. Alerts

The service also allows you to use pre-define real time alerts based on a number of events and conditions, and customize these alerts based on specific business needs. You can set alerts based a broad range of criteria, such as:

- Mobile Timesheets activity – start/stop, travel, idle times
- GPS activity – speeding, enter/exit specific regions
- Specify those who should be notified for each particular alert, including the worker who triggers the alert if desired

These alerts can be configured for display only on the web console, sent in real time via email or text message, and/or summarized in management reports. This provides a powerful tool to better manage and evaluate workers, and to correct or reward behavior as needed.

3.6. Reports

You can choose from the pre-configured reports or create your own reports.
### Alert Report

#### Stops & Travel

#### Jobs

<table>
<thead>
<tr>
<th>Date</th>
<th>Worker</th>
<th>Assigned Jobs</th>
<th>Completed Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/18/2011</td>
<td>Allon, Diana</td>
<td>58</td>
<td>58</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Canedo, Joseph</td>
<td>15</td>
<td>7</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Clay, Lyza</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Golon, Marcelo</td>
<td>84</td>
<td>82</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Gonzalez, Cristina</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Hababy, Alexandra</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Clay, Hernandez, Mary</td>
<td>80</td>
<td>71</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Lopez, Ana</td>
<td>1</td>
<td>3</td>
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<tr>
<td>07/18/2011</td>
<td>Mackowski, Angela</td>
<td>73</td>
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</tr>
<tr>
<td>07/18/2011</td>
<td>Nives, Mervin</td>
<td>88</td>
<td>88</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Guevara, Angeles</td>
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<td>9</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Fier, Alberto</td>
<td>56</td>
<td>59</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Roda, Ana</td>
<td>69</td>
<td>69</td>
</tr>
<tr>
<td>07/18/2011</td>
<td>Sanchez, Marie</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>
4. Logging In

On activation of your account you will receive a welcome e-mail from Field Force Manager support with the login credentials of the Field Force Manager web application.

Below are the steps to login to the Field Force Manager web application:

- Open a supported Web Browser.
- Login in to the application using your login credentials provided in the welcome e-mail. You need to enter your Username, Password and the Account ID as received in the welcome e-mail.

Once you are logged into the web application for the first time, you will be prompted with the End User License Agreement screen. Click Accept to proceed.
There are eight major navigation tabs in the web application - Workers, Maps, Jobs, Locations, Alerts, Mileage, Reports and Administration. Refer to the below sections for detailed information on each of those tabs.
5. Web Management Application Controls

<table>
<thead>
<tr>
<th>Controls</th>
<th>Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabs:</td>
<td>There are nine top level menus available in the web application - Workers, Maps, Jobs, Forms, Locations, Alerts, Reports, Mileage and Administration.</td>
</tr>
<tr>
<td>Filter:</td>
<td>Filters allow you to view specific data on maps and reports. Filters are found on the left hand side within the Toolbar of you Administration. You can filter by Groups, Display, and Date/Time.</td>
</tr>
</tbody>
</table>

- **Date/Time Filter:** The Date/Time filter is used filter time rage on Administration. To set Date/Time range, click on the Set Date Filter button to bring up the filter selection. There are two types of date/time filters.
  - **Relative:** Specifies a relative time frame from the current date. I.e., “Today” would always display today’s information each time you login to web application by adjusting the date to the current
data and time.
  - **Fixed**: allows a user to specify a specific timeframe and duration in the past or future. This mode is typically used for researching a specific time frame.

- **Group Filter**: You may have multiple groups in your company. The Groups Filter helps you to filter within groups. Check or uncheck the appropriate boxes next to the divisions/groups to view specific data for the work groups selected.

- **Display Filter**: Display filters help you filter Job Status, Worker Status (with secondary filters of Communication & GPS Location Notification), Location Types, Labels and Geofences.

- **Sort**: Within each tab of the Administration user can sort the data by the columns.

**Note** – Field Force Manager web application remembers your date and time filter settings and presents your user data based on that next time you login to the web application.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search</strong>: You can search for Jobs, Workers, Users and Location using the search box.</td>
<td><strong>Data Panel</strong>: This panel gives you the detailed information of each and every page you are navigating to in the web application. Such as if you are on the Workers Map page, this section will show all the logged in users on the Map.</td>
</tr>
<tr>
<td><strong>Information</strong>: On the top right corner of the screen you will find links to the Support and Training sites. Your Account Name and ID along with the version number of the Administration is also displayed.</td>
<td><strong>Refresh</strong>: The web application displays the most recent information upon request. Refreshing the web application does not pull information straight from the mobile device, but shows what has been communicated to the Field Force Manager Administration database.</td>
</tr>
</tbody>
</table>
6. Setup and Configure account

Field Force Manager web application allows you to setup your mobile workers, groups, security roles etc.

6.1. Groups

Groups are used to organize your mobile workers based upon your company divisions, markets, and territories. Groups will allow a web application user to filter and organize workers. Groups option is accessible from under the Administration tab.

Parent Groups

When creating or editing a particular Group, a parent level can be specified. This allows web users to create visual levels within their Groups, displaying Group “tree” structures when selecting their filters for various features within the web application. Parent levels do not affect configurations, settings, or preferences for users or their devices within their Groups, which still need to be set separately for each individual Group.
Create a new group

- Select the **Groups** button from under the Administration tab.
- Click the **Create Group** button from the toolbar found in the Groups page. The Create Group window will appear.
- Enter the group name.
- Choose the **Parent Group Name** (choose **No parent group** if none is wanted).
- Click the **Save & Close** button.
Edit an existing group

- Select the **Groups** button from under the Administration tab.
- Click on the group you would like to edit from the Groups page. The Options Menu will appear.
- Click the **Edit Group** button. An Edit Group window will open.
- Modify the name and/or parent Group.
- Click the **OK** button.

Delete an existing group

- Click on the group you would like to delete from the Groups page. The Options Menu will appear.
- Click the **Delete Groups** button.
- A confirmation window will appear asking if you are sure you would like to delete the selected group. Select the **OK** button.
6.2. Security Roles

Administrative users of the web application now have the ability to create, edit, and delete various security roles for their company. Each role can be configured to access certain functionality 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 functionality can also be granted or restricted on a role-by-role basis. The web application does have several default roles built in (such as “Operations”, “Mobile Worker,” Company Administrator,” and “Super User”). Role configuration is only available in the Field Force Manager Administration’s Basic and Premium/Pro packages.

Creating a role

- Select the Roles button from under the Administration tab.
- Select the Create Role button from the toolbar found in the Roles page. The create window will open.
- Give the role a unique name.
- Select the group that it will be associated with.
- Select the permissions you want associated with that role.
- Click Save when completed.

Editing a role
Select the **Roles** button from under the Administration tab.

Select the role you would like to edit from the Roles page. The Options Menu will appear.

Click the **Edit Role** button. An Edit Role 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.)

Select the new group or permissions that you want associated with this role.

Click **Save** when completed.

#### Deleting a role

Select the **Roles** button from under the Administration tab.

Select the role you would like to delete from the Roles page. The Options Menu will appear.

Click the **Delete Role** button. (If it’s a built in role you will receive a warning that a global role cannot be deleted.)

A confirmation window will appear asking if you are sure you would like to delete the role. Select **OK**.
Copying a role

- Select the Roles from under the Administration tab.
- Select the role you would like to copy from the Roles page. The Options Menu will appear.
- Click the Copy Role button. A Copy Role window will open.
- Give the copied role a unique name.
- Make the desired changes to the group or permissions.
- Click Save when completed.

![Copy Role window](image)

6.3. Users

The users tab will display a list of all of the users that are set up for your account.

![Users tab](image)

Note – Users page include both the Mobile Worker and the Super User that are setup in your account.

Create User

- Select the Users button from under the Administration.
- Click Create User.
- Enter appropriate user details in the respective fields and click Save & Close.
Edit User

- Click on the respective user from the Users page.
- Select **Edit User** from the pop-up menu.
- Edit User page appears on your computer. Change the necessary information and click **Save & Close**.
Delete Users

- Click on the respective user from the Users page.
- Click Delete User from the pop-up menu.
- Click OK to confirm the deletion.

6.4. Devices

The “Devices” tab displays a list of all of the devices that are configured within your web application account during setup. To add new devices to your system, contact your network provider’s sales representative to purchase additional licenses.

Editing a device

- Select the Devices button from under the Administration tab.
- Click on the device you would like to edit. The Options Menu will appear.
- Click the Edit Device button; an Edit Device window will open.
- Make the necessary field changes and then click Save.
Deactivating a device

Users who have zero button activation and have the wrong user linked to the device have a hard time un-linking the user and device to hook it manually to the correct user. With this release you will have the capability to deactivate any device in your device list.

![Deactivate Options]

6.5. Profiles

Profiles on FFM web application can be managed at two levels - Company Profile and Individual Profile. The Company Profile/Settings is applicable to all teams. This design includes location, time, and mobile jobs tracking arrangements.

![Add Profile]
6.6. Settings

“Settings” option consists of a number of preferences which allows you to control various capabilities and configurations of the Field Force Manager web application. The new design of the Settings page has been categorized based on the different feature type (such as Mobile Jobs, Map, GPS etc.) or by context (such as Web, Device, System).

To access the Settings page click Administration > Settings from the FFM web application.
7. Locations

Field Force Manager Mobile allows you to create locations and assign to your mobile workforce. For example, Location can be vendor sites, worker’s homes, or any other location a worker might frequently stop.

7.1. Location Types

The Location Types tab will allow you to customize and configure the location types and icons for your company.

Create a new Location Type

- Select the Locations Type button from under the Administration tab.
- Click the Create Location Type button from the toolbar found in the Location Types page. The Create Location Type window will appear.
- Enter the Location Type name. If this is a “Prohibited” Location check the Prohibited checkbox.
- Select an image by clicking the left and right arrows.
- Click Save or New to create another Location Type.
Edit an existing Location Type

- Select the Location Type button from under the Administration tab.
- Click on the Location Type you would like to edit from the Location Types page. The Options Menu will appear.
- Click the Edit Location Type button. An Edit Location Type window will open.
- Modify the information and click Save.

Delete an existing Location Type

- Click the Location Type button from under the Administration tab.
- Click on the Location Type you would like to delete. The Options Menu will appear.
- Click the Delete Location Types button. A Reassign Location Type window will open.
This window will prompt you to 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).

Once the locations are assigned to a new Location Type, Click OK.

7.2. Locations

The Locations page is used to monitor all the locations setup in your account. All of the information on this screen is displayed as soon as the application uploads the information. You can create new locations from this tab. You can also edit/delete/view the existing locations in your account.

Creating a Location

- Select the Locations tab
- Click on the Create Location button found in the toolbar of the Locations page. A create location window will appear.
- Select the type of location you are creating from the Type drop-down box.
- Enter the name and address of the location. That is the minimum amount of information required to create a location.
- Click the Save & Close button at the bottom of the window to create the location.
- To view any of your locations on the map select the location(s) and click the Map button.
- To view the details of your locations select the hyperlink associated with that location name in the location list.
Editing a Location

- Select the Locations tab.
- Click the name of the location you would like to edit (you can only edit one location at a time). The Locations Options Menu will appear.
- Select the Edit Location button. An Edit Location window will open.
- Make the desired changes and click the save button at the bottom of the window.
Deleting a Location

- Select the **Locations** tab.
- Click the Location you would like to delete. The Options Menu will appear.
- Select the **Delete** button from the Options Menu.
- A confirmation window will appear to confirm that you wish to delete the selected locations. Click **OK** to delete the location(s).

Send Location to Worker

This feature allows you to assign any location which already exists in your account to anyone of your field worker.

- Click on the **Location** which needs to be assigned to your field worker.
- Select **Send Location to Worker**.
- Select the appropriate users or groups and click **Send**.

Your mobile worker will only receive the location when the phone communicates with the Field Force Manager server. Once received, select Locations from the Field Force Manager main menu and select the appropriate location from the Locations page. The phone will prompt you to view the location on the map or to get the turn by turn direction towards the location based on your handset.

You can also delete the location from your device. This action doesn’t affect the web application.
Viewing Location Detail

This feature allows you to view the specific information attached to a location.

- Select the **Locations** tab.
- Click on the Location you would like to view the Location Detail for; the Options Menu will appear.
- Select the **View Location Detail** button from the Options Menu. You will be taken to the Location Detail screen.

Upload Locations

- Select the Upload Locations button from the tool bar found in the Locations page.
- Select the “Get Template” button to download location upload template
- Unzip XLS, CSV and txt file to local computer
- Enter Locations into XLS file, Save the file
- Select the “Browse” button
Select the file with data to be uploaded

- Check Update Records box if you want to update records if they’re the same
- Select the “Submit” button.

7.2.1 Viewing Job History at a Location
You have the ability to view jobs that have been linked to a particular location by viewing the Job History tab.

NOTE: Only available in the Premium/Pro package.

- Select the Locations tab.
- Click on the Location you would like to view the Job History for the Options Menu will appear.
- Select the View Job History button from the Options Menu. You will be taken to the job history screen.
7.2.2 Geo-tuning a location
Geo-tuning is used to tune the latitude and longitude of a location.

To Geo-tune a Location

- Click on a Location icon on the Map.
- Select “Geo-Tune” from the pop-up menu.
- The mouse cursor will turn into a target.
- Click on the map where you would like to move the Location to.
7.2.3 Configuring a WorkZone for a location

WorkZones are boundaries set around a location & can activate features when mobile devices cross the boundaries of those zones.

To Configure a WorkZone:

- Click on the desired Location icon on the Map.
- Select Configure WorkZone from the pop-up menu
- A Configure WorkZone window will open, showing the icons from the currently viewed map
- Create a circle or polygon WorkZone or make the necessary adjustments to an existing WorkZone.
- Click the Save button.
7.3. Geofences

The web application provides a user 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, a web application user could create a Geofence around an entire state or around a highway. To setup a Geofence, first create a Geofence and then create an alert for that particular Geofence.

Creating a Geofence

- Click on the Geofence tab under Administration in the web application.

Note – You can also toggle between List and Map view on the Geofences page.

- Select the Create Geofence button.

- The Geofence configuration page will be displayed. Enter a Geofence Name, Description, and Group.
- Enter an address, city, state or zip. Click the Find Address button. The system then presents the user with a map of that area, allowing the user to create circle or polygon Geofence.
- To create a circular Geofence, click the Circle button. 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 the Save button.
To create a defined polygon, click on the **Polygon** button. Then, simply click on the map where you want the points to appear. Once there are three or more points on the map, web application will automatically connect them. If you make a mistake or would like to alter the polygon, you can move a point by clicking on the one you want to move, and then clicking the map in area you want to move it.

Select the Geofence color if you would like a color other than the default blue. This color will be used to display Geofences on the maps.

When done, click the **Next** button.

Next, the **Details and Groups** screen appears. Enter an appropriate name and description for the Geofence and check the box for **Active**.

Select the appropriate Groups from under the Associated Groups section. Once done click **Next**.
• In the third and the final step of creating Geofence, select the appropriate workers to be fenced. Once done click **Save & Close**.

**Note** – The assigned workers will appear based on your Group selection in the Details and Groups screen.

**Editing a Geofence**

• Click on the **Geofence** tab under Administration in the web application.
• Select the Geofence you would like to edit. The Options Menu will appear.
• Click the **Edit Geofence** button.
• Modify the Geofence as desired.
• Click **Save**.
Deleting a Geo-fence

- Click on the Geofence tab under Administration in the web application.
- Select the Geofence you would like to delete. The Options Menu will appear.
- Click the Delete Geofence button.
- Click OK to confirm the deletion.
Show on Map

A new type of map called ‘Geofence Map’ has been introduced with the FFM web application. To get into the Geofence Map page, click any Geofence from the Geofences page and select **Show on Map**.

![Geofences Map - Middlefield Rd](Image)

**Geofence Activity Log**

Geofence Activity Log page records various events (such as entering, exiting etc.) performed by your mobile workers in or around a Geofence.
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..
8. Track Workers

To initiate tracking your mobile workforce, go to Workers tab from the Field Force Manager main menu.

8.1. Workers

The workers tab is used to monitor your mobile workforce. From this tab, you can the workers name, which group they belong to, their last known communication status, their latest GPS location data, Job ID and last job action, Stop-Travel information. Worker list also provides the status of GPS and network connectivity of the worker’s mobile device. When navigating in the workers tab, ensure your filters are set correctly to view the information you are looking for.

Worker List provides you with the following information:

1. **Worker's Name & Group**: Name of the Worker and the Group he belongs to.

2. **Worker Status & Duration**: The last updated status of the worker along with the duration.
   - **Job Information**: If a worker on a job and the respective job name and action.

3. **Stop or Travel with Duration**: The duration of Stop or Travel status. If worker has stopped or travelled continuously for more than 24 hours, the worker list will display the status as “>24 h”.
Last Updates / Notifications: This column shows you the date/time of the last communication along with the status of GPS and network connectivity of the worker’s mobile device. Here you will find two icons, one is for network and another one is for GPS connectivity.

- **Worker List Notifications icons:**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Notification</th>
<th>What does it mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔷️</td>
<td>Update current</td>
<td>Update from the mobile app is current and the app is communication as expected</td>
</tr>
<tr>
<td>🔷️</td>
<td>Update past due</td>
<td>Server has not received any update from the device in the past 65 mins*</td>
</tr>
<tr>
<td>🔷️</td>
<td>App exited</td>
<td>User has exited the mobile app. The server does not expect any updates</td>
</tr>
<tr>
<td>🌐</td>
<td>Location current</td>
<td>The last location fix was good and current</td>
</tr>
<tr>
<td>🌐</td>
<td>Location past due</td>
<td>The server did not receive an acceptable location fix in the last update</td>
</tr>
<tr>
<td>🌐</td>
<td>Location is turned off</td>
<td>Location services on the device has been turned off</td>
</tr>
<tr>
<td>🔷️</td>
<td>App exited</td>
<td>User has exited the mobile app. The server does not expect any updates to the users location</td>
</tr>
</tbody>
</table>

- **Battery Charge Level icons:**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>🍃</td>
<td>High</td>
</tr>
<tr>
<td>🍃</td>
<td>Medium</td>
</tr>
<tr>
<td>🍃</td>
<td>Low</td>
</tr>
</tbody>
</table>
Critical
Charging
Update Past Due
App Exited

Note - We have added the capability to export your worker list to excel format for future references.

Note – In-Page help is also provided for Workers page now.

8.2. Options Menu

Left Click in any list page (like job list, worker list etc...) 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. The picture below shows the Option Menu appears after clicking on a specific Worker. To access a specific function, click on the option you want (e.g. if you want to see a worker’s map, click on Worker Map).
To cancel out of an Options Menu, click on the X.
8.3. Worker Map from Workers

In the Workers tab, if you click on a worker’s name, the Options Menu will appear. Clicking on Worker Map will display the last known location of this specific worker. You can also view the bread-crumbs trail of where this worker traveled throughout the specified date and times you set in the Date/Time filter. By clicking on the red dots, you can see the date and time that GPS point was collected, and if enough information was collected, it will also show you the worker’s direction and speed.

You can also view the Route of a mobile worker from the Workers Map. Click on the Workers icon to get the Worker Detail pop-up window. Now Select Show Routes.

8.4. Activity Log from the Workers page

In the Workers tab, if you click on a worker’s name, the Options Menu will appear. To see that specific employee’s Activity Log, click on Worker Activity Log. Here you can view all of the actions that worker has performed within the date and time range which you have set using your Date/Time filter. A “perfect day” using the Field Force Manager will show you a Login, Start Shift, End Shift, Exit Field Force Manager (if you using mobile timesheets). There is also an Activity filter which allows you to specify which actions you would like to view such as, pay hours etc. The data shown in the new Workers Activity Log page is more organized and convenient for our customers. The Workers Activity Log page
can easily be shared with anyone in the organization either by E-mail or Downloading or Printing or Zipping (only if any signature or picture is attached) this page.

8.5. Worker Details from Workers page

In the Workers tab, if you click on a worker’s name, the 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/time it was received and their hours of operation. You can also access a worker’s Locations and Maps from the Worker Details window in the Toolbar on the left side of the screen.
8.6. Device Status Log

The Device Status Log provides a chronological list of all communication between the FFM Mobile App and the FFM Web Application, including user initiated events and all background communications. This log can be used to troubleshoot mobile device issues communicating with the web application.

*Note – This feature is available with the latest version (18) of the mobile app.*

- Device Status log can be used by web admins to troubleshoot or analyze device activity.
- Chronologically ordered Historical information of Airplane mode, Device power off, Restricted GPS can help identify why a device did not communicate and also track mobile worker’s app usage
- Historical battery levels identify reasons for no communication.

To access Device Status Log select a worker in the worker list page and click on 'Device Status Log' from the context menu. The page will display each communication event as a row, the screenshot shown
The Device Status Log displays all device communication events that occur while the mobile app is running and is summarized after each user session. Each communication event displays the following:

1. **Date and Time**: When the device communicated with web application
2. **Event**: Type of communication event
3. **GPS Collection**: The GPS collection column displays the number of attempts the mobile app makes to collect GPS points and the number of those GPS points that are considered ‘good’. You can use the web application to change the setting for the number of GPS points to collect per GPS upload.
4. **Battery**: Battery charge level
5. **Location**: Location information (latitude-longitude) of every communication event
6. **Session Summary**: The summary displays the duration, start and end times, communications and GPS points collected during the time between login and exiting the mobile app. If a user doesn't click exit when they finish using the mobile app, the session will continue until the next time the user logs in. That login will trigger the session summary and will also start a new mobile app session.
Note: FFM considers that GPS points with accuracy of 300m or lower are considered good. GPS points with any higher accuracy are considered a bad GPS points and are discarded by the system.

Communication events
As an administrator you can choose from 20 different events to troubleshoot issues. These 20 communication events shown below:

1. **Activate Device**: The mobile device was activated on FFM
2. **Airplane Mode OFF**: Airplane mode was turned OFF
3. **Airplane Mode ON**: Airplane mode was turned ON
4. **App Exit**: Mobile worker exited the mobile app by clicking exit
5. **App Login**: Mobile app was launched. There 3 ways app can be launched:
   - **Manual Start**: Clicking on the FFM icon on the mobile device
   - **Auto Start**: Starts when the device is powered ON or starts during Hours of Operation
   - **Remote Start**: Initiated by the manager from the web application
6. **Deactivate Device**: The mobile device was deactivated on FFM
7. **Device Power OFF**: Mobile Device is Powered OFF
8. **Device Power ON**: Mobile Device is Powered ON
9. **Form Submitted**: A form is submitted using the mobile app
10. **GPS turned OFF**: Device GPS is turned OFF by the mobile worker
11. **GPS turned ON**: Device GPS is turned ON by the mobile worker
12. **GPS Upload**: A GPS Upload event occurs when the web application polls the mobile app for GPS points. The frequency of the GPS Upload is 15 minutes by default.
13. **Job Action**: A worker performed a Job Action (i.e. start job or end job, etc.) using the mobile app
14. **Location update from Worker**: The mobile worker sent his/her location to the web application by tapping "Send Current Location" in Settings in the mobile app
15. **Low Memory**: Notification that mobile device does not have enough resources to run applications
   - Memory refers to the RAM memory on the mobile device. Every app on the mobile device requires some minimum RAM memory to run. If too many apps are running on the mobile device, it could run out of RAM memory and the various apps could start
having errors and/or crash.

A Low Memory event occurs when the device operating system identifies low RAM memory. This alert is displayed in Device Status Log and managers should notify mobile users to close all unused apps to save RAM memory.

16. Ping Worker: Manager user pings a worker’s mobile device from the web application

17. Sync: The device initiates a request for new data from the web application
   - A Sync event occurs when the mobile app requests data from the web application. This happens every 65 minutes by default or proactively, if the user hits Sync in the mobile app settings.

18. Timesheet: Worker performed a Timesheet Action (i.e. clock-in or clock-out, etc.)

19. Trip End: Worker ends a mileage trip

20. Trip Start: Worker starts a mileage trip

**Extra Device Info**

The mobile app version can now easily be found by clicking on the Extra Device Info icon in the upper right corner of the Device Status Log. The following pop-up will display:

![Device Status Log For Cheryl D.]

Note: All of the data displayed on the Device Status Log can be exported to a Microsoft Excel file by clicking on the XLS icon in the upper right corner of the screen.
Event Filter

You can filter the data displayed on the Device Status Log by clicking event filter from the toolbar menu.

**Note** - If your device platform does not support an event then the event will be disabled in the filter. For example, iOS does not provide a way for FFM to capture Airplane Mode and Device Power ON/OFF, so for an iOS device, the event filter will show these events grayed out, as seen below.

The table below displays event availability by FFM Mobile App Version:

<table>
<thead>
<tr>
<th>Event</th>
<th>Android</th>
<th>Brew</th>
<th>Blackberry</th>
<th>iOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activate/Deactivate Device</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Airplane Mode ON/OFF</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>App Exit/Login</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Battery Charging</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Battery Levels</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Device Info</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Device Power ON/OFF</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Form, Job &amp; Timesheet Action</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>GPS turned ON/OFF</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>GPS Upload</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
### Troubleshooting using Device Status Log

1. Ensure your mobile worker is using the latest mobile app version (v18) by clicking on extra device info
2. Use the date filter found in the left toolbar to filter the time range
3. Click on the Date and Time header to view data in ascending or descending order
4. You can also use event filter to remove unwanted events from the list and focus only on events applicable to the situation
5. Identify issues by looking at information like GPS Collection, Battery & Location of communication events

Use session summary to get a summary for your workers session.

### 8.7. Ping

Field Force Manager Mobile during normal operation 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 application 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 Multiple Workers**: The worker map and work list has a button “Ping Workers” which allow 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 GPS coordinates for each minute will be uploaded for the next ten minutes for the workers selected in the multi-worker ping.

8.8. Remote Start

If a worker has not logged into their application and their phone is on, the web user can press the remote start button in the Options Menu to start the application on the mobile phone. The mobile phone will be sent an SMS message that will start the application. (Note: This feature will not work if there is a block on text messages.)

8.9. Reports from Workers page

8.8.1 GPS and Stop Report from Workers page

The GPS & Stop report is created based upon your Date/Time filter; however, since this is a daily report, it will only create the report based upon the first day specified in your filter. This report will show you a break-down of that worker’s day by stop. The report also shows each non-stop GPS point with its speed, direction of travel, latitude, longitude and approximate address. To run this report, click on a name from the Workers page. When the Options Menu appears, select Report and then click on GPS and Stop.
8.8.2 Worker Detail Report

The Worker Detail Report displays mobile jobs completed by that specific worker, Start and End Date/Time, and the Duration of the job. It also totals the number of mobile jobs started late, which can help when giving customers an estimated time that the worker will arrive. This report also totals the time spent on all mobile jobs, as well as averages the amount of time spent per job. To run this report, click on a name from the Workers page. When the Options Menu appears, select Report and then click on Worker Detail Report.
9. Mobile Timesheets

Field Force Manager Mobile lets you log your hours quickly and easily. Just select the appropriate Mobile Timesheets action from the list, and Field Force Manager Mobile will automatically log the time and send the data back to the web application. The administrator may also add a form to the Mobile Timesheets actions to collect data associated with your hours.

Your mobile workforce can perform various shifts and break events on the phone.

- Tap **Timesheet** from the Field Force Manager main menu on your phone. In the next screen, tap **Start Shift**. You can also tap on Start Break when you take a break.

- Now tap on the **End Break** when you go back to work. Once done with your shift, tap **End Shift**.
Once your mobile worker has finished performing the Timesheets events on the phone, you can view their Timesheets report from the Administration.

9.1. Worker Timesheets

In the Workers tab, if you click on a worker’s name, the Options Menu will appear. Clicking on the View/Edit Worker Timesheets option will show you the workers Mobile Timesheets for the filtered time period and allow you to edit and view Mobile Timesheets edits.
9.2. Editing a Mobile Timesheets

- Select the shift you would like to edit
- Click the row you would like to edit (you can only edit one shift at a time). The Mobile Timesheets Options Menu will appear.
- Select Edit Shift
- Edit the date/time of shifts and breaks in the case where a mobile worker forgot to punch in or out on time.
  - If a user forgot to perform an action altogether, the action can be added by pressing the Add Break or Add Shift button
  - Comments on the edit can be entered by pressing the comments button.
- Each Mobile Timesheets action must be separated by at least one minute
- Mobile Timesheets shifts cannot overlap
- Select **Save** when changes are complete
9.3. Adding a Shift

- Press the Add Shift Button
- Edit the starting time and date
  - You can add the end date / time or leave open
- Select Save

9.4. Viewing Mobile Timesheets Edit History

- Select the shift you would like to view edit history for
- Click the row of the row you would like to view (you can only view one shift at a time). The Timesheets Options Menu will appear.
- Select View Timesheets History

9.5. Viewing Mobile Timesheets Detail

- Select the shift you would like to view edit history for.
- Click the row of the row you would like to view (you can only view one shift at a time). The Mobile Timesheets Options Menu will appear.
- Select View Mobile Timesheets Details. You can also e-mail/print/download the Mobile Timesheets Details page for future reference.
9.6. Time Off

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

- Select the Create Time-off button on the Workers Time Off List
- Select the Start and End date and time for the time off.
- Select a reason and enter notes and click Save & Close.
10. Mobile Forms

Mobile Forms are used by companies to collect information from the field, using a mobile device, rapidly providing data back to the office and reducing time spent processing paperwork. Forms can have various types of fields, including text, numbers, money, select lists, check boxes, photos, signatures and many more, and can be configured to replicate paper forms that your company may use today. Mobile forms can be used either on an as-needed basis, we call this Ad Hoc, or they can be associated with Timesheets and/or Jobs:

- **Ad hoc Forms**: Mobile users can access any Ad Hoc form, at any time, in the Forms menu of the FFm Mobile App. Managers can determine which forms are deployed to which users.

- **Timesheet Forms**: If a form is linked to an action with Mobile Timesheets (start shift, end shift, etc.), then it will be triggered when the worker takes that action. The worker will be prompted to complete the form at that time. This is helpful when certain information is needed on a regular basis – such as odometer information gathered at the beginning and end of a shift.

- **Job Forms**: If a form is linked to a job action in Mobile Jobs (job start, job complete, etc.), then it will be triggered when the worker takes that action and the worker will be prompted to complete the form at that time. This is helpful for reminding workers to gather specific information from a job, like a photo or signature to confirm proof of service.

- Before you start using forms, let’s learn how to setup mobile forms using your FFM web application. The following section will explain the steps to create, edit, copy, remove and access the mobile forms.

10.1. Setup Form

This section explains the 4 steps of creation and also how to edit, copy and remove forms on the FFM web application.

10.1.1 Creating Mobile Forms

Forms can be created from Forms list page (Forms > Form).

**Step 1- Form Setup**: This step allows you to configure a unique Form name, Display name and relevant description of your mobile form.
• Select **Create Forms** button from the left toolbar found in the Forms list page

![Create Form](image)

• Enter a Name and Display name for the Form
• Enter description to describe the purpose of the form. This field allows you to enter maximum 250 characters
• Select **Next** to move to the **Fields Setup** screen

**Step 2 – Field Setup:**

Field Setup helps you to define how and what data to collect when the mobile worker uses the form on the field.

• Select the **New Field** button to create Form Field
  
  o **Display Name**: This is the name which will be reflected on your mobile device
  o **Field Ref** (Field Reference will be generated automatically based on your entry into the Display Name field). Field ref has to be unique for each form field. You can only enter letters, numbers and underscores with no space. This is typically used if your system is integrated using web services.
  o **Field Type**: Field types are used to define what information to collect when mobile worker uses forms on the field. It can be the picture or the signature of your customer
as a proof of service or Money for expenses. FFM provides 13 different types of form fields.

1. **Cascading List:** Cascading list is a hierarchical drop-down list where the available option in one level depends on the selection of its previous level:
   - Select **Cascading List** from the **Field Type** drop-down
   - To utilize this field type you must upload a .csv or .xls file. If you do not have the default template, download the cascading list template by clicking **Upload > Get Template**
   - The downloaded .zip file will contain 2 types of files (.CSV and .XLS)
   - These files will display a sample cascading list and a set of instructions
   - Once you have created your own cascading list, upload the file using the Upload feature and click **Apply** to add a cascading field to the form

2. **Checkbox:** Checkbox allows your mobile worker respond with yes or no values. Checking or selecting will give yes value and unchecking give a no response. To setup a check box field
   - Select **Checkbox** from the field type drop-down
   - Click **Apply** to add a check field to the form

3. **Date:** This form field allows you to capture date information.
   - By default Phone Date will be selected, which captures the date configured on your mobile device.
   - You can also capture custom dates using this form field once you have selected the right option click **Apply** to add a date field to the form

4. **Money:** Money field type allows users to enter dollar value from the field.

5. **Multi Select List:** Use multi-select list when you want mobile worker to select more than one choice (option) from the available list of choices
   - Select **Multi Select List** from the field type drop-down
   - Enter the options separated by comma in the Choices box
   - Once done click **Apply** to add a multi select field to the form

6. **Number:** Selecting **Number** from the Field Type drop-down allows you to capture numerical entries
7. **Odometer**: Use odometer field type option to capture the miles travelled. Mobile users will have to enter Odometer reading when this field type is displayed
   - Select **Odometer** from the field type drop-down
   - You can make this field mandatory and also enter a default value for the convenience of your mobile worker

8. **Picture Capture**: Use this field to enable field workers to capture pictures at their job sites or use it as a proof of service
   - Select **Picture Capture** from the field type drop-down. Once done click **Apply** to add picture capture to the form
   
   *Note: A mobile worker can capture multiple pictures for each form field*

9. **Select List**: Use select list to configure a drop-down list for your mobile worker where worker can select only one possible choice
   - Select **List** from the field type drop-down
   - Enter the drop-down options in the **Choices box** separated by comma

10. **Signature**: This form field provides you the paperless solution for obtaining customer’s signature on a smartphone
    - Select **Signature** from the field type drop-down and click **Apply** to add signature capture to the form
    
    *Note: A mobile worker can capture multiple pictures for each form field*

11. **Text**: The text field allows you to capture any text or number. You can define the maximum no of characters your that your mobile worker can input by providing character count in **Max Chars**.
    - Display Lines lets you define the size on the text box on the workers device. Size can be defined by no of lines to display ( **Display Lines** )
    - Text field also allows you to scan barcodes. To scan a barcode, tap on the text field and click **Barcode** at the bottom

12. **Time**: This form field allows you to capture time.
    - By default **Phone Time** will be selected, which captures the time configured on your mobile device.
✓ You can also capture custom time by selecting custom time. Custom time will display the time by you.

13. **URL**: URL form field allows your mobile worker to access dynamic and secure data from web hosted system using the phone’s browser. Such as Customer history, price of spare parts, service manual or information hosted in Google Drive etc.

✓ Select **URL** from the field type drop-down
✓ Enter the **URL String** with appropriate parameters
✓ URL Method option allows controlling the visibility of the URL parameters to your mobile worker
   a. **Get**: Allows your mobile worker to see the URL parameters set by you
   b. **Post**: Hides the URL parameters from your mobile worker
✓ URL Parameters field lets you entering “name-value” pairs separated by “&” and no space. For E.g. “mfg={manufacturer}&srl={serial}”.
✓ URL parameters field also lets you to insert the value from an existing form field. To insert an existing form field, click **Insert** button next to the **URL Params** box. This will give you a list of all existing form fields configured in your current form. Select a form field and click **Insert**.

Now while invoking the URL, the field value entered by the user in this particular form field, will be used as a URL Parameter.

- Follow the above instruction to add multiple form fields to a single form
- For few form fields you will get the option to set the maximum field length. Such as Money, Number, Odometer and Text. Field length determines how many characters your mobile worker will be able to enter onto the mobile app. Maximum field length allowed is 2000 characters per field
- Check the **Required** box while configuring your mobile form to make the form field mandatory
- Use the up-down arrow button to re-order the form fields. You can determine the order of the form fields for your mobile worker moving them up or down
• Select Next to move to the Deploy Setup screen

Note:

• Default value enables you to enter predefined values for your mobile worker. A mobile worker can then change the value if required.
• To make any changes you must click apply for changes to take effect.

Step 3 – Deploy Setup: This step allows you to

• Make the form active: Forms can only be used when they are active. This option is an alternative to deleting the form. If a form is deleted then all data will be lost, deactivating (Uncheck state) will retain all configuration settings but will prevent both web and mobile users from using the form.

• Make the form available on mobile device: Check the option Available on Forms Menu box to make the form available from the forms menu on the phone
  Note – E-mail Recipient (step 4) will only be available, if “Available on Forms Menu” is enabled (checked)

• Attach a Timesheet Action to your form: (Timesheet actions that execute this form)

  You can make a form a Timesheet Form by attaching the form to a specific Timesheet Actions (Start Shift, Start Break, End Break, and End Shift).
To attach the mobile form to a Timesheet action, check the box next to the action on which you would like to have the form appear.

A form can also be attached to a job action while creating the job type. Refer to Create Job Type for more details.

*Note*: Only one form can be attached to a timesheet action. If a form has already been attached to a timesheet action then the check box would be in a disabled state.

- **Restrict the form to Groups**: Forms by default are available to all groups. If you want to restrict usage of the form to certain groups then select the groups in the group selection box.

- Once complete, hit the **Next** button to move to the **E-mail Recipients** step.

**Step 4 –E-mail Recipient:**

This step allows you to configure automatic sharing of **Ad hoc** form details to a list of recipients. Emails are dispatched after the mobile worker submits a form on the mobile device. This page contains two sections. The section on the left allows you to select groups and the section on the right allow you to select or add recipients.
• Select **Groups** from **Groups** box on the left. Based on your group selection, the list of users will be populated on the right.

• Now select the users on the right. Only users who have Email ID’s will display check box for selection. To learn how to add Email ID for a user refer the **Create/Edit** in Users section. The Users box will display the following information:
  
  o First Name, Last Name or the Preferred Name of the user
  o Role of the user
  o Assigned Group of the user
  o Email ID of the user (if there is no Email ID associated with an user, the checkbox will be disabled)

• You can also enter additional Email ID’s in the ‘**Additional E-mail IDs’** box
  
  o Enter an Email ID and then hit space, comma or semicolon to separated e-mail ids in this box
  o Click on ‘x’ to remove an existing Email ID
  o Double click on the Email ID to edit

• Check **“Allow mobile workers to email completed form”** at the bottom to enable mobile workers to Email a completed Ad hoc form from their mobile device directly.

• Change the status of Auto email delivery to Disabled to stop automatic emailing of completed forms to the selected list of recipients.

• To stop mobile workers to email completed forms uncheck the option **“Allow mobile workers to email completed form”** on the same page.

• Click **Save & Close** to complete the process.
Note:

- Automated email dispatch can only be turned on for Ad-hoc forms only. Email Recipient Configuration does not apply to forms linked to Job or Timesheet action.
- Checkbox to e-mail completed form from the mobile device will be enabled by default.
- E-mailing completed forms from the mobile device is only available with Android and iOS.
- E-mail Recipient option will be enabled by default.
- A Maximum 50 Email ID's can be configured per form.

10.2. Forms List

Forms list displays all types of forms configured in your account. Forms List can be accessed from the main menu. Mouse-over the Forms tab in the main menu and select Forms from the drop-down. Forms list gives you a list of all the forms configured in your FFM account.

The list page displays:

- Name of the form
- Display name set by you while configuring the form
- Assigned groups
• Attached Timesheet Actions (in case of Timesheet Forms)
• Attached Job Actions (in case of Job Forms)

Submitted Forms

Submitted Forms can be accessed by clicking the Submitted Forms button from the left navigational toolbar. This page displays all forms submitted by your mobile worker in a single place. For more information refer to the Submitted Forms section.

Note:

• In-Page help is accessible by clicking the 🤔 icon for frequently asked questions.
• Forms List can be exported to excel by clicking the Export to Excel icon 📄 at the top right corner.
Editing a mobile form

You can edit an existing form using the FFM web application. Following steps explains how to edit a form:

- Mouse-over the Forms tab from the main menu and select Forms from the drop-down
- Click on the mobile form you would like to edit from the Forms page
- Click the Edit Form button
- Make any necessary changes to the form
- Click Save when completed

Copying a mobile form

Instead of creating a form from scratch you can copy an existing form and make necessary changes. All details including groups and email recipients are copied.

- Mouse-over the Forms tab from the main menu and select Forms from the drop-down
- Click on the mobile form you would like to copy from the Forms page
- Click the Copy Form button. A Copy Form pop-up window appears
- Enter name of the form and click Save

Deleting a mobile form

Remove an unwanted form from your Forms list.

- Mouse-over the Forms tab from the main menu and select Forms from the drop-down
• Click on the mobile form you would like to remove from the Forms page
• Press the **Delete Form** button
• Click **OK** to confirm the deletion

**View Submitted Forms**

The last option in the context menu is **View Submitted Forms**. This option allows you to view all submitted forms of the selected form.

• Mouse-over the **Forms** tab from the main menu and select **Forms** from the drop-down
• Click on the mobile form for which you would like to view the submitted Form info
• Click on the **View Submitted Forms** from the context menu

**10.3. Mobile App**

Easy to use FFM mobile app allows your mobile worker to access forms on their mobile device. After you finish creating the mobile forms using the FFM web application, the mobile form will be sent to the phone next time the phone communicates with the server. Tap/click on the Forms icon on from the FFM home page on your phone to get the Forms list displayed. Tap/click on any one of the form to view the different form fields associated to it.
10.3.1 E-Mail Completed Forms from Mobile Device

You can configure an ad hoc form to automatically deliver a .PDF copy of the completed form by email upon form submission. To allow mobile workers to email completed Ad hoc form, go to the Email Recipients step of the Edit Forms screens and check the option "Allow mobile workers to email completed form". Forms can be shared internally or to a customer without any intervention from web administrators.

- Once the feature is turned for a form, Mobile workers will get an E-mail Form screen every time the form is submitted.
- This page allows mobile worker to enter e-mail ids separated by space, comma or semicolon. Workers can also select e-mail ids from your phone’s contact list. Hit the send button to share the Ad hoc form.
- Use the Skip button to bypass sharing of submitted Adhoc form
Note

- To email forms from field install the latest version of the mobile app (v18.1.0)
- Version 18.1.0 is only available for Android and iOS currently
- E-mailing completed forms from the mobile device is only available with Android and iOS

10.4. Submitted Forms

Submitted Forms page will display all types of forms (Ad-hoc, timesheet and job forms) submitted by mobile workers.

To get into the Submitted Forms page, mouse-over the Forms tab from the main menu and click Submitted Forms from the drop-down. For every Submitted form this page displays

- **Date**: Displays the date the form was submitted by the mobile worker
- **Form**: Name of the Form
- **Submitted By**: Name of the mobile worker who submitted the form
- **Linked Action/Event**: Displays the linked action. For non-Ad hoc forms this column displays if the form was linked to a Job or Timesheet action.
• **Location**: Displays GPS address with location name if available. When address is missing from this column, your field worker must be in a bad coverage area or the location service has been turned off on the device. If the GPS is still getting processed by our servers then you would see processing GPS message.

• **Share**: This column allows users to email, print or download (as PDF) the form.

---

**Filters**

The submitted forms page displays all forms submitted by mobile workers. This data can be further filtered using filters found in the left navigation toolbar.

• **Form Filter**: This filter allows user to filter by available active forms and linked action (i.e. Ad-hoc/Job Action /Timesheet Action forms). Once filtered the submitted forms will only display data based on filters selected.
  
  o The Form filter pop-up has two types of filters: The filter on the left displays a list of all active forms. You can filter out relevant forms by checking or unchecking forms.
  
  o The panel on the right lets you filter your list based on the linked action to each form. You can filter data based ad-hoc, timesheet or job forms.

• **Date Filter**: Allows you to filter the submitted form list based on submitted date and time.

• **Group Filter**: Allows filtering the submitted form list based on groups.
Export Form List

Submitted form list page can also be exported as excel by clicking the icon on the top right hand side of the page. The exported page will display the list page in an excel format which can be used for analysis.

Note:

- All columns except ‘Share’ are sortable in the Submitted Forms page
- Submitted forms cannot be deleted at this moment

Edit Submitted Form

To correct erroneous form submissions you can edit a submitted Form. Edit Form allows you to edit all the form fields submitted by your field worker.
To edit a submitted form:

- Mouse-over the **Forms** tab from the main menu and select **Submitted Forms** from the drop-down
- Click on the submitted mobile form you would like to edit
- Click **Edit Submitted Form**
- Make necessary changes and click **Save & Close**

**View Submitted Form Detail**

Submitted form detail page provides the detailed information of each and every form submitted by your mobile worker. To access Submitted Form Detail page:

- Mouse-over the **Forms** tab from the main menu and select Submitted Forms from the drop-down
- Click on the submitted mobile form for which you would like to view the details
- Click **View Submitted Form Detail**
- Submitted Form Details page displays the following info:
  - **Form Information**: Form information section includes the following info:
    - Name of the form
    - Name of the mobile worker who submitted the form
    - Submitted date and time
    - **Address**: GPS address with location name if applicable
  - **Details**: Details section lists out all the form fields (based on form configuration) such as Cascading List, Picture Capture, and Signature Capture etc.
• **Share**: Form detail page can be shared using e-mail, print and download as PDF/Zip options.
  
  o **E-mail**: The **E-mail** option lets you share the form details page as PDF. Click on the e-mail icon to bring the ‘E-mail Details’ pop-up.
  
  o Enter the recipient’s e-mail ids separated by comma in the ‘To’ field.
  
  o You can also enter the e-mail id in the ‘From’ field which will be used to send the e-mail.
  
  o You can configure a custom body message and subject of the e-mail.
  
  o Once you have completed configuring the e-mail, hit **Send**.
  
  o **Print**: Clicking on the Print icon, generates a PDF version of the form detail page and sends the details page to your configured printer.
PDF: PDF option lets you export your form details page as PDF
Zip: Zip option is only available if any media file (ie. Picture/Signature capture) is attached to your form details page. The zipped folder will contain the form detail PDF and the media file (ie. Captured Picture/Signature)

10.5. Form Alerts

FFM web management application allows you to trigger an alert for a form submission event. Form alert helps you to track the submission of a particular form or a form field and sends out an automated message to your mail box.

Note – Form alerts can be configured for Ad-Hoc forms only

10.5.1 Setup Form Alert

This section explains the steps to create a Form Submission alert. Mouse-over the Alerts tab from the FFM main menu and select Configure Alerts. Now click Create Alert button from the left toolbar.

Step 1 - Event Setup:

This step allows you to configure name, description and event type of the alert. You can also activate a form from this window.

- Enter a suitable name and description of the alert
- Check the box “Active” to activate the alert. If this box is left unchecked, you alert will not be activated
- Select “Form Submit Event” from the Event Type drop-down
- Click Next to move to the Rule Setup screen
Step 2 – Rule Setup:

This step allows you to set the conditions that should trigger the alert.

- Click the **New Rule** button
- Select **Forms** from the **Attribute Type** drop-down
- Depending on the attribute type you selected, the field options below will change. You can create an alert either for submission of a form or for a specific form field in the form

Create an Alert for Form Field

- If you want to trigger an alert for submission of a form field select **Fields** in the next drop-down.
- Next select the form for which you want to trigger the alert from the list of all forms configured in your account
- Clicking on the next drop-down brings up the list of all the form fields associated with the form you selected in the previous step. Select a form field from the drop-down. For e.g. “Parts_Repaired”
- Next select any one of the below options:
  - Equal to: triggers the alert when the data submitted by the field worker matches with the default value (next option) set in the web
  - Not Equal To: triggers the alert when the data submitted in the field doesn’t match with the default value (next option) set in the web
• Enter a default value with respect to the form field you selected. For e.g. “AC Cleaner”

Create an Alert for Form

• If you want to trigger an alert when the field worker submits a form, select **Type** in the **Attribute Type** drop-down (second option under the attribute type).
• Select any one of the below options:
  o **Is One Of**: triggers the alert when the field worker submits the form you have selected in the default value field (next field)
  o **Is Not One Of**: triggers the alert when your field workers submits any form other than the form you selected in the default value field (next field)
• Next select the appropriate form for which you want to trigger the alert from the list of all forms configured in your account
• Once you have completed setting up the rules for your alert, click **Apply**.
• Now click **Next** to move to the Group Setup window
Step 3 – Group Setup:

This step allows you to select user for whom you want to trigger the alert

- Select the group or individual users by selecting the checkboxes that this alert will apply to

Step 4 – Schedule Setup:

- The schedule window allows you to set the date and time range when the alert can be triggered. If left blank it will be 24 hours a day

Step 5 – Action Setup:

This step allows you to configure the alert message and its recipients

- **Alert Subject:** Enter the subject of the alert message
- **Alert Message Body:** Enter the message of the alert e-mail which will be sent to the recipients (next field)
- **Recipients:** Select those user who are going to be informed when the alert triggers

Use **Insert Attribute** to help you fill Subject and Body of the alert

**Note** – Ensure that the notification information is setup correctly for your users who are going to receive the alert e-mail. Refer to the [Create User](#) section for more details.

- Check **Notify Triggering Worker** box to enable your field worker for whom the alert triggers also receives the alert message on their mobile device via mobile app
Note: The alert list page (Alert Configuration) has a pre-configured alert for Forms “Form Submitted”. You can activate and further personalize the form for your company needs.
10.6. Forms Reports

All submitted form data can be exported into a MS Excel format from the report export page. Go to Reports > Exports and select the form from the drop down Form Export section. Based on selected Group Filter and Date Range all submitted forms can be exported to Excel.

![Export Page Screenshot]
11. Mobile Jobs

Field Force Manager Mobile allows the dispatcher to send jobs to mobile workers in the field. The job functionality is available in the Basic and Premium/Pro packages and is different based on the package selected.

**Premium:** Advanced job dispatch from the web application to mobile user. The web application user can look up and link mobile jobs to known locations in the system, which reduces data entry and errors. The web application user can view all or a single mobile job on all maps, read details of a job, calls ahead to a job contact, and obtains both audible and map-enabled driving directions to the job. The mobile user can update the job status (“Accept,” “Reject,” “In Transit,” “Start,” “On Hold,” or “Complete”). Upon completion of a job, the user is prompted with the “Job Completion Form.” Once a job is completed, the history can be viewed from the “Mobile Jobs” list or via the “Location Job History.”

### 11.1. Configuring Job Type

Configuration of job types can be performed by web users for each company using the Job Type tab. Configuring a job type allows customers to customize and extend the information that is sent to a mobile worker upon a job being dispatched, the actions and workflow a customer follows while completing a mobile job and the mobile form that a worker should complete during the job process.

(This functionality is only available in the Field Force Manager Mobile Premium/Pro package).

The Job Type tab allows customer to create and edit Job Types associated with their company.
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 mobile jobs are created. The configuration of the job type allows the administrator to configure the template to meet the needs of their business.

Setting up a Job Type

The first step in setting up a job type is specifying some basic information.

- **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 time of a job when the scheduled start date time is specified, but the scheduled end date 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>Schedule Start Date time</td>
</tr>
<tr>
<td>end</td>
<td>Scheduled End Date time</td>
</tr>
<tr>
<td>actual start</td>
<td>Actual Start date time</td>
</tr>
<tr>
<td>actual End</td>
<td>Actual End date 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**: The setting controls whether or not the job type is available to be used to create new mobile jobs.

- **Make Job Name Visible**: While setting up a job type, in the web web application, the ‘Job Name Visibility’ field in step 1 has three options controlling the visibility of job names:
  - **Hidden**: Hides the ‘job name’ field. When selected the field will not be visible to the user when creating a job.
  - **Visible – Optional**: Make the ‘job name’ visible but optional. When creating a job, users can skip entering a value for this field.
  - **Visible – Mandatory**: Make the ‘job name’ visible and mandatory. When creating a job, users will be required to enter a value for this field.

- **Allow Job Create from Device**: This option allows you to start manual jobs on the phone. You will have to check the box to activate this feature for your field user.

- **Device – Job Create Complexity**: You will get this activated only after selecting the check box for the previous (Allow Job Create from Device) option. Select “Simple” to get only the “Job Number”, “Job Name” and the “Job Attribute” fields. Select “Advanced” to get the “Job
Location”, “Priority” and “Scheduled Start Time” along with the Job number, name fields on the phone.

- If job alerts or reports are utilizing 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 changed.

**Creating Job Type Details**

The second step in creating a job type is to setup the details that can be sent to a mobile worker or displayed on the web application. Each job types can have many job details, for each job details the following information can be specified. The order the job detail appears in the list will control the order it appears on the web application and on the device.

- **Detail Name**: The name of the detail, this is the label that will appear next to the detail on the web application and on the device. This is what the detail will be referenced by in the integration as well.
- **Detail Type**: The type of detail.
- **Text**: 4000 character text
• **Default Value:** The default value a detail will have if not specified during job creation.

• **Required:** Whether or not the detail is required to be populated when a job is created.

• **Show on Device:** Whether or not the detail will be displayed on the detail screen of a job on the device.

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**Creating Job Type Actions**

The third step and final step in creating a job type is to setup the job actions. Each job type must have one or more actions that allow a worker to update their 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 what the order of workflow will appear on the device.

• **Action Name:** This is the name of the action and how it will appear on the device and the web application. The action name will update the status description of a job when the action is performed.

• **Repeatable:** Whether or not the action can be completed twice during the same job.
• **Required:** Whether or not the action is required to be completed before additional actions can be performed.

• **Timer Option:**
  - **Start/Resume Job**
    - This start or resume the job duration timer
  - **On Hold**
    - This will pause the job duration timer until another Start/Resume Job action is performed.
  - **Terminate Job**
    - This will complete the job duration timer and mark the job as completed or terminated. Terminated mobile jobs cannot be re-opened or re-assigned.
  - **None**
    - An action configured with this option will not change the status of the job timer. This is useful for Accept, Reject or Call or Print actions that should not affect the actual job duration.

• **Form Attached:** Allows a mobile form to be chosen to be attached to the job action and presented to the mobile worker when the action is performed.

• **Delete on Device:** Whether or not the action will remove the job from the device upon completing the action.

• **Delete on Server:** Whether or not 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.
Group Setup

The fourth and the final step in creating Job Type allow you to select the Groups whom this Job Type should be available to. Check the box for the appropriate Groups and click Save & Close.
Delete Job Type

FFM web application now also allows you to delete unwanted Job Types from your web portal. In order to remove a job type:

- Click on any Job Type from the Job Types page.

Select **Delete Job Type** from the pop-up options.
11.2. Creating Mobile Jobs

- Select the Jobs tab.

- Click the Create Job button from the toolbar found in the Jobs page. The list of job types will appear.

- Fill in the necessary job details. Customers would have the option to make Job Reference Number hidden, viewable or editable. If you select hidden from the Job ID preferences, you will never get the Job ID field while creating a job. This will help customers to create and dispatch mobile jobs quickly using the FFM web application. We have also introduced one more interesting feature which will help you to control the visibility of the option “Job Name”. While creating Job Type, you will see one new check box called “Make Job Name Visible”. If it’s checked, the Job Name field would be visible both in web application and Device while creating a new job.

NOTE: Comments field only available in Field Force Manager Mobile Premium/Pro package.

- When finished entering the Job Details, click Next to move to the Location tab, or simply click the Job Location tab at the top of the window.

- Enter in a valid address for the location of the job.

- Click Validate Address to verify that is an actual address and can be plotted on the map.

- Once verified, click Next to go to the Job Details screen.

- Fill in the necessary job details.
The Job Name is the name that is displayed to the mobile worker. Choosing a name that is descriptive like the Customer Name or the Type of Service is recommended.

The Job reference number is a unique number for the job. You can enable the system to automatically generate job reference number in the company settings part of the web application.

The details will be different based upon the job type selected.

- When finished entering the Job Details, click **Next** to move to the Parameters screen.
- Select which skills are required for the job
- When finished entering the Job Parameters, click **Next** to move to the schedule screen.

Select the Pattern of the job from the Job Pattern drop-down.

- If you select One time job, then follow the below steps:
  a. 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.
  b. Select the duration of the job.
  c. Select the priority of the job.
  d. 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.
If you select Always Available Job, then once your mobile worker completes one job, the next job will automatically be created and sent to the worker without any human effort. To create an Always Available Job, follow these steps:

a. You can set these Mobile Jobs to end (found in Step 4 of job create) on a particular date, set to end after specific number of occurrences or just set them to never end.

b. Select the priority of the job.

c. 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 worker's device.

Recommend Worker

To assist in the process of selecting which mobile worker to assign a job to the web user can select the recommend worker button. The system will show a decision matrix for each of the workers for the company and score the workers applicability for the job.

Once a worker is selected from the recommend list

The recommend worker system shows the following elements for each worker

i. Name
ii. Group

iii. Availability
   1. Is the worker within hours of operation / time off

iv. Capacity
   1. What percentage of the workers capacity for the time slot the job is scheduled for is full
   2. 0% = no jobs schedule currently 100% = time slot is full

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

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

vii. Distance from Job
   1. This is the distance between the last known location of the worker and the job address.

viii. Phone Number
   1. Displays the phone number of the worker's device.

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

**Viewing Job Details:**

After creating a job in the Field Force Manager web application, you will be able to view the job under the Jobs page. Click on the appropriate job from the Jobs page and select **View Job Detail**. You will be presented with the Job Detail page.

Field Force Manager Mobile gives you the ability to E-mail, Print or Download the job information from the Job Details page.

Your Job Details page now also shows the job actions and mobile forms associated with the respective job.
Job Details page also displays the name of the location set by you using the web application along with the address.

### Linking Mobile Jobs to Customers

- 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.

- The contact and address information for the Customer will be populated into the job.
Editing Mobile Jobs

- Select the Jobs tab from the Field Force Manager main menu.
- Click the job that you would like to edit. The Options Menu will appear.
- Select the Edit Job button. A new edit window will open.
- Edit any of the necessary information throughout the tabs.
- Click Save when finished editing.

Deleting One Time Jobs

- Select the Jobs from the Field Force Manager main menu.
- Click the job you would like to delete. The Options Menu will appear.
- Select Delete Job button.
- A Delete confirmation box opens. Click the OK button.

Deleting Always Available Jobs

While deleting an Always Available Jobs, you will be prompted with the following three options:
• **Only this Job** – This action will only delete the current job in this series.

• **All future Jobs in this series** – This action will delete all the future jobs to be created in this series except the current job.

• **This Job and all future Jobs** – This action will help you to delete both the current and all future jobs which are expected to be created in this series.

### Reassigning Mobile Jobs

- Select the Jobs from the Field Force Manager main menu.
- Click the job that you want to reassign. The Options Menu will appear.
- Select the Reassign Job button; a new reassign window will open.
- Select the new group or worker to reassign the job to.
- Click OK.

### Uploading Mobile Jobs

- Select the Jobs tab.
- Click Upload Mobile Jobs button.
- Click on Get Template from the Upload Jobs pop-up window. Fill up the upload spread sheet with the necessary information and save.

**Note** – If you are subscribed to the Field Force Manager Mobile Basic package, then enter “Basic” in the Job Type Column.
• Click **Browse** to upload. Click **Submit**.

Once the job is created and assigned from the Administration, your field worker needs to perform the job on the phone. Mobile worker will receive the new job notification when the phone communicates with the Field Force Manager server. Now tap on Jobs button from the Field Force Manager main menu to view the Jobs page and select the job from the list which has been received recently.
Once you select the Job from the Jobs page, you will be prompted with below options on your phone.

**Summary:** This option allows you to access the Job Summary page.

**Actions:** Selecting Actions will take you to the Job Actions page where you can perform several job actions associated with this particular job, such as Job Start, Job End etc.

**Navigation:** Navigation menu prompts you to select amongst the available application which will show the job location on the map or gives you the turn by turn direction on the phone towards your job location.

**Details:** Job Details page will be displayed once you select the Details option.

**Edit Job Actions**

This feature will help our customers complete mobile jobs that could not be completed in the field. Scenarios we can address include

- Mobile Jobs not started - Mobile worker is unable to start the job (issues with phone, app, network or unknown reason). The web user can start and complete the job.
- Partially completed mobile jobs - Mobile worker is unable to complete the job because of an issue with the phone, our app or the network. The web user can get information about the job and complete the job actions on the web.

Completed Mobile Jobs - Data entered while performing the job was inaccurate. The web user can edit the job action and mobile form information.

**Note** – If the job is in unassigned state, you will not get the “Edit Job Actions” option in the context menu.
How to create/start job on Mobile phone?

In case your company admin is unable to dispatch a job from the Administration, you can also start a job manually on your phone.

- Select Jobs from the main menu and click Create New Job.
- Select the appropriate Job Type from the drop-down and enter the details in the rest of the field and select Create Job. Now you will be prompted to start the job on your phone.
- Note – Barcode scanning in the Mobile Job Create fields are also supported now.
Viewing the Job Activity Log

- Select the Jobs tab.
- Click on the Job that you want to see the Job Activity Log for; the Options Menu will appear.
- Select the View Job Activity Log button. The screen for the Job Activity Log will open.

Viewing Worker Mobile Jobs

This feature allows you to view all of the Jobs that a specific worker has been assigned to.

- Select the Jobs tab.
- There is a worker assigned for every Job listed. Click on the Job with the worker you want to view. This will open the Options Menu.
- Click on the Worker Jobs button. This will bring you to a page that lists all of the Jobs assigned to the worker you have chosen.
Availability Calendar

The Availability Calendar within the web application gives users looking to dispatch mobile jobs the ability to visualize all of the mobile 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 a concept of a timeslot to aide in the dispatch of mobile jobs. A company can choose have small hourly time slots (default) or larger half or even full day time slots. The availability calendar color codes each time slot for a day based upon a worker’s availability. Workers availability is set by the hours of operation set for the mobile worker and also take into effect any schedule exceptions made in the time off system. Each time slot has a capacity of mobile jobs that can be scheduled into it before it is considered to be over capacity. The capacity for each time slot is calculated based upon the scheduled start time of the job. It does not take into account mobile jobs that start in other time slots or the actual start times of jobs.
Time slot color codes

- **Unavailable (Grey)** – The time slot for the worker is either outside the hours of operation for the worker or the worker has taken the entire time slot off.
- **Available (Yellow)** – The time slot for the worker is within the workers hours of operation and the worker has not requested time off for the entire time slot. In addition the time slot has not been filled with mobile jobs for the worker.
- **Booked (Blue)** – The time slot for the worker had availability, but the availability for the time slot has been filled.
- **Overcapacity (Red)** – The time slot for the worker is over booked. The capacity for the time slot has been exceeded or the worker was unavailable to start with.
Mobile Jobs on the Calendar

- Mobile 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 the actual started time of the job and will project the expected end time of the job as dotted line. 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 mobile jobs on the jobs page 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 mobile jobs on the calendar the user can edit the job from the mouse over menu or from the mobile jobs screens.

Configuring Timeslots

- By default a company is configured with time slots for Monday-Friday 8am to 6pm.

- Timeslots are used to manage the capacity and assignment of mobile jobs for your workers. Choosing small time slots allows you to manage down to the hour. Choosing larger time slots allows you to manage at a multi-hour level.

- Time slots can be changed / added or removed by pressing the Configure Time slots button at the top of the Availability Calendar.

To add /edit a time slot

- Choose Configure Timeslot button
- Select New /Edit Time Slot
- Choose the day of the Week
- Select the start time for the time slot
• Choose the duration for the time slot
• Note: Time slots cannot overlap with each other
• Choose the capacity for the time slot.
• This is the number of mobile jobs that can be scheduled for a worker before a time slot is considered to be over capacity.
• Select Apply
• Add or change other time slots
• Select Save & Close to save your changes.

To delete a time slot

• Select Time Slot from the select list
• Choose Delete Time slot button
• Select Save & Close to save your changes.
Worker & Job Match

To aide in the dispatch of the right worker to right job the web application allows worker and mobile 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 mobile jobs within the company.

Creating a Skill

- Select the Worker & Job Match-Skills Tab.
- Select the Create Skill button; a create window will open.
- Give the skill a unique name, description and code.
- Click Save & Close when completed.
12. Mileage Manager

The Mileage Expense Manager module simplifies mileage expense tracking by using Trips app.

This section will cover

1. Mileage Configuration
2. The mobile app for Trips
3. Access to trip data via pages on the web and reports

12.1. Mileage Configuration

The Configuration page allows you to administer, how your mobile workers should record and track mileage. Each trip recorded by your mobile worker can be associated with category and purpose. These could be used for reimbursement or just for general book keeping.

Mouse-over the Mileage tab from the web portal and select Configuration. Once you are in the Configuration page, you will see two sections:

- Category
- Purpose
12.1.1 Trip Category

Each trip can be associated with a Category which allows you to set the reimbursement rate. This would help you better organize mileage deductions and the rate per mile. FFM provides five pre-defined categories with Reimbursement Rate which are ready for your use.

1. Business *(Most commonly used and set to default)*: Set at Reimbursement Rate of $0.565 per mile
2. Charitable: Set at Reimbursement Rate of $0.14 per mile
3. Medical: Set at Reimbursement Rate of $0.24 per mile
4. Moving: Set at Reimbursement Rate of $0.24 per mile
5. Personal: Set at Reimbursement Rate of $0.16 per mile

**Adding a new category**

Including the pre-defined categories the configuration page allows you have a maximum of 10 different categories. To add new category,

- Click **Add Category** from the left toolbar.
- This will bring up a pop up window where you can add details for your new category. Details include
  - Category name
  - Re-imbursement rate
  - Description of the category
  - Check box to make the category as a default category for all your mobile workers.
- Hit **Save & Close**
Editing and deleting categories

Pre-defined created by FFM or Custom categories created by you as an administrator can be edited or deleted.

To edit a category

- Click on the category you want to edit from the category list
- Select Edit Category and make the necessary changes in the edit category window

To delete a category

- Click on the Category you want to delete from the category list
- Select Delete Category and remove the category from the category list

NOTE: Default category cannot be deleted.

You will notice two check boxes above the list of categories in the configuration page:

**Enable Category**

If you do not want to track mileage expenses for your trips you can disable categories. Uncheck this option to disable categories. When disabled, you will not be able to view the list of categories anymore, the trips list and trip details page will not display a category. Categories are enabled by default.

**Make Category visible to mobile users**

By unchecking this option you can hide categories on the mobile app, but can still track mileage expenses. By default categories are not visible on the mobile app. You can make them visible by checking this option.
12.1.2 Trip Purpose
Each trip can also have a purpose along with category. By default there are two pre-defined purposes

1. Sales Call (Most commonly used and set to default).
2. Delivery

Adding a new purpose

To add a purpose,

- Click Add Purpose from the left toolbar
- This will bring up a pop up window where you can add details for your new purpose. Details include
  o Purpose name
  o Description of the purpose
  o Check box to make the purpose as a default purpose for all your mobile workers
- Hit Save & Close

Editing and deleting purposes

Pre-defined or custom purposes created by you as an administrator can be edited or deleted.

To edit a Purpose

- Click on the purpose you want to edit from the purpose list
- Select Edit Purpose and make the necessary changes in the edit purpose window
To delete a Purpose

- Click on the Purpose you want to delete from the Purpose list
- Select **Delete Purpose** and remove the Purpose from the list of Purposes

**NOTE:** Default Purpose cannot be deleted.

Just like categories you will notice two check boxes above the list of purposes in the configuration page:

**Enable Purpose**

Uncheck to disable purpose. When disabled, you will not be able to view the list of purposes anymore, the trips list and trip details page will not display a purpose. Purposes are enabled by default.

**Make Purpose visible to mobile users**

You could also hide purposes on the mobile app, but still would like to track mileage expenses. By default purposes are not visible on the mobile app. You can make them visible by checking this option.
12.2. Trips on Mobile App

The Mobile App will show a new menu “Trips” which allows your mobile worker to record mileage trips quickly.

Note – Mobile app v18 and above support the mileage/trips capability.

12.2.1 Starting a trip

To start a trip on the device, tap on the Trips icon from the main menu. Once in the mileage menu you will notice the Current Trip tab selected by default. Current Trip allows you to enter trip start/end information to record mileage.

- Enter the Start Odometer reading. You can also tap the camera icon next to Start Odometer field to capture the Odometer picture
  Note – Picture capture of Start Odometer is available only on iOS and Android devices
    - If the “Auto-fill with last end odometer” option is turned on/checked, then the Start Odometer reading will get populated with last end odometer reading (This option will be checked by default)
- Enter trips related notes (Optional)
• Tap the **Start** button now to record the odometer start reading

**Note** - You can also enter category and purpose for the trip. These options will only show up if the option “**Make Category/ Purpose visible to mobile users**” has been enabled in the configuration page of Web Application.

### 12.2.2 Associate Trips to Jobs

To associate trips to jobs,

• Tap on “Select a Job” and select a Job from the list of assigned jobs. This would link the trip to the selected Job

• Trips can also be started from Job list page
  - In the Jobs drop down menu, tap on last option **Start trip** to record mileage for a Job

**Note** –

• You can link multiple trips to a Job but only one Job can be associated to a Trip.

• Multiple Trips cannot be started at the same time. You will need to end a running trip to start a new mileage trip.
12.2.3 Ending a trip

Once a trip has started you will be taken to the End Trip screen.

- Enter the End Odometer reading. You can also tap the camera icon next to End Odometer field to capture the Odometer picture
  
  Note – Picture capture of End Odometer is available only on iOS and Android devices

- **Distance – Odometer (mi)** field will be calculated automatically based on your Start and End Odometer entries

- Enter Additional expenses (Optional)

- Enter/Edit trip related notes (Optional)

- Tap End Trip button to complete the trip

---

12.3. Review Completed Trips & Trip Details on the Mobile App

The second tab “Trips” next to Current trips displays all the completed trips. This is a good place to review all trips that you have taken. Trips can be sorted based on Date/Distance/Dollars.

Tap/select the trip to view details of an individual trip. This will take you to the trip details section where complete details of the trip can be viewed.
Note – Viewing Trip List and Trip Details on mobile device are only available with Android and iOS.

12.3.1 Viewing trips on Web Application

The Trips page (Mileage > Trips) will display all trips taken by your mobile workers. This page can be filtered by Date and Group.

Trips page will provide you a summary of all the trips your mobile workers have taken:

- When the trips were taken (Date)
- Who recorded the trip (submitted by)
- Trip Category
- Trip Purpose
- Odometer Distance
- GPS Distance
- Reimbursement amount (Calculated based on category reimbursement rate) and
- Trip Status (In progress or Completed)
Note –

- Trips can be deleted by selecting multiple trips and then hitting the Delete button in the left toolbar. You can delete individual trip by clicking on a trip and selecting the delete trip option from the context menu.

- In-Page help for frequently asked questions is available by clicking the ? icon.

12.3.2 Viewing Trip Details on web application

To view more in-depth details of a particular trip select the trip and click on View Trip Details. This will take you to the trip details page.

Trip Details page is divided into various blocks. Each block provides vital information of the trip taken by the worker.

- **Trip Summary**: displays Date the Trip was taken, Worker & Workers Group Name, Category & Purpose of the trip, Trip Status and job links (if any)

- **Reimbursement**: displays total Duration of the trip, Distance based on entered odometer readings, GPS route and suggested route, Reimbursement rate, Additional Expense and total expenses based on reimbursement rate and additional expenses

- **Trip Details**: displays Start and End Odometer readings with time and location stamp along with picture capture (if taken)
- **Trip Route**: displays the route the user took vs. Google suggested route. Comparison of routes can be used to optimize travel and save on fuel and time for your company.

*Note: Routes are displayed only for last 30 days*

All details on this page (except map) can be exported to PDF, printed or shared via email.
View Summary and Calculated miles for Odometer, GPS and Suggested Route.

View pictures of start and end Odometer

View Start and End locations with time stamp

View workers trip route on a map along with Suggested Route
12.4. Mileage Reports

Three new reports will be available along with Mileage.

1. Mileage Summary
2. Mileage – Trips by Workers
3. Mileage – Trips by Jobs

Below tables list out the available columns with various mileage reports:

### Mileage Trip Summary Report

<table>
<thead>
<tr>
<th>Available Columns</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Trips</td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td>User Group</td>
</tr>
<tr>
<td>Name</td>
<td>Preferred Name or &quot;First Name, Last Name&quot;. Should not be left blank</td>
</tr>
<tr>
<td>Odo Distance</td>
<td>Odometer Trip End - Odometer Trip Start</td>
</tr>
<tr>
<td>GPS Distance</td>
<td>Sum of straight line distances between GPS points in a trip, including the GPS points for Start and End trip</td>
</tr>
<tr>
<td>Additional Expenses</td>
<td>Mileage along with Additional expenses</td>
</tr>
<tr>
<td>Mileage Expense (Odo)</td>
<td>Mileage along with Additional expenses</td>
</tr>
<tr>
<td>Total Expense (Odo)</td>
<td>Mileage along with Additional expenses</td>
</tr>
</tbody>
</table>

### Mileage Trip Details Report

<table>
<thead>
<tr>
<th>Available Columns</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip ID</td>
<td>Trip ID</td>
</tr>
<tr>
<td>Group</td>
<td>User Group</td>
</tr>
<tr>
<td>Name</td>
<td>Preferred Name or &quot;First Name, Last Name&quot;. Should not be left blank</td>
</tr>
<tr>
<td><strong>Full Name</strong></td>
<td>First Name, Middle Name, Last Name, &quot;Preferred&quot;</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td><strong>First Name</strong></td>
<td>First Name</td>
</tr>
<tr>
<td><strong>Middle Name</strong></td>
<td>Middle Name</td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
<td>Last Name</td>
</tr>
<tr>
<td><strong>Preferred Name</strong></td>
<td>Preferred Name</td>
</tr>
<tr>
<td><strong>Phone #</strong></td>
<td>Phone Number</td>
</tr>
<tr>
<td><strong>Start Date/Time</strong></td>
<td>Date/Time of Start Trip</td>
</tr>
<tr>
<td><strong>End Date/Time</strong></td>
<td>Date/Time of End Trip</td>
</tr>
<tr>
<td><strong>Odo Start</strong></td>
<td>User entered Odometer at Trip Start</td>
</tr>
<tr>
<td><strong>Odo End</strong></td>
<td>User entered Odometer at Trip End</td>
</tr>
<tr>
<td><strong>Duration (D:H:M)</strong></td>
<td>Trip End Time - Trip Start Time</td>
</tr>
<tr>
<td><strong>Duration (mins)</strong></td>
<td>Duration in minutes</td>
</tr>
<tr>
<td><strong>Odo Distance</strong></td>
<td>Odometer Trip End - Odometer Trip Start</td>
</tr>
<tr>
<td><strong>GPS Distance</strong></td>
<td>Sum of straight line distances between GPS points in a trip, including the GPS points for Start and End trip</td>
</tr>
<tr>
<td><strong>Suggested Distance</strong></td>
<td>Distance returned by Google when we pass the start and destination coordinates</td>
</tr>
<tr>
<td><strong>Start Location</strong></td>
<td>Name of the pre-defined location (if available)</td>
</tr>
<tr>
<td><strong>End Location</strong></td>
<td>Name of the pre-defined location (if available)</td>
</tr>
<tr>
<td><strong>Start Address</strong></td>
<td>Start Address</td>
</tr>
<tr>
<td><strong>End Address</strong></td>
<td>End Address</td>
</tr>
<tr>
<td><strong>From</strong></td>
<td>Location Name (if available)</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Address</td>
<td>Address or Location Name (if available)</td>
</tr>
<tr>
<td>To</td>
<td>Address or Location Name (if available)</td>
</tr>
<tr>
<td>Start Latitude</td>
<td>if no GPS point &quot;N/A&quot;</td>
</tr>
<tr>
<td>Start Longitude</td>
<td>if no GPS point &quot;N/A&quot;</td>
</tr>
<tr>
<td>End Latitude</td>
<td>if no GPS point &quot;N/A&quot;</td>
</tr>
<tr>
<td>End Longitude</td>
<td>if no GPS point &quot;N/A&quot;</td>
</tr>
<tr>
<td>Category</td>
<td>Name of the Category</td>
</tr>
<tr>
<td>Purpose</td>
<td>Name of the Purpose</td>
</tr>
<tr>
<td>Odo - GPS</td>
<td>Odometer miles - GPS miles</td>
</tr>
<tr>
<td>Odo - GPS (%)</td>
<td>(Odometer miles - GPS miles/Odometer miles)*100</td>
</tr>
<tr>
<td>Odo - Suggested</td>
<td>Odometer miles - route miles</td>
</tr>
<tr>
<td>Odo - Suggested (%)</td>
<td>(Odometer miles - route miles/Odometer miles)*100</td>
</tr>
<tr>
<td>Suggested - GPS</td>
<td>Route miles - GPS miles</td>
</tr>
<tr>
<td>Suggested - GPS (%)</td>
<td>Route miles - GPS miles/Route miles*100</td>
</tr>
<tr>
<td>Additional Expenses</td>
<td>Value entered as additional expenses while ending a trip</td>
</tr>
<tr>
<td>Reimbursement Rate</td>
<td></td>
</tr>
<tr>
<td>Mileage Expense (Odo)</td>
<td>Odo Distance * Reimbursement Rate</td>
</tr>
<tr>
<td>Mileage Expense (GPS)</td>
<td>GPS Distance * Reimbursement Rate</td>
</tr>
<tr>
<td>Mileage Expense (Suggested)</td>
<td>Suggested Distance * Reimbursement Rate</td>
</tr>
<tr>
<td>Mileage Expense (Odo - GPS)</td>
<td>Odometer Reimbursement - GPS Reimbursement</td>
</tr>
<tr>
<td>Mileage Expense (Odo - GPS) (%)</td>
<td>(Odometer Reimbursement - GPS Reimbursement/Odometer reimbursement)*100</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mileage Expense (Odo - Suggested) (%)</td>
<td>Odometer Reimbursement - Route Reimbursement</td>
</tr>
<tr>
<td>Mileage Expense (Odo - Suggested) (%)</td>
<td>(Odometer Reimbursement - Route Reimbursement/Odometer reimbursement)*100</td>
</tr>
<tr>
<td>Mileage Expense (Suggested - GPS)</td>
<td>Route Reimbursement - GPS Reimbursement</td>
</tr>
<tr>
<td>Mileage Expense (Suggested - GPS) (%)</td>
<td>(Route Reimbursement - GPS Reimbursement/Route reimbursement)*100</td>
</tr>
<tr>
<td>Total Expense (Odo)</td>
<td>Mileage along with Additional expenses</td>
</tr>
<tr>
<td>Total Expense (GPS)</td>
<td>Mileage along with Additional expenses</td>
</tr>
<tr>
<td>Total Expense (Suggested)</td>
<td>Mileage along with Additional expenses</td>
</tr>
<tr>
<td>Job Type</td>
<td>Name of the Job Type</td>
</tr>
<tr>
<td>Job ID</td>
<td>Job ID</td>
</tr>
<tr>
<td>Job Name</td>
<td>Job Name</td>
</tr>
<tr>
<td>Job</td>
<td>Job Type &amp; Job Name</td>
</tr>
</tbody>
</table>
13. Reports

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

Reports organized into categories for easier identification. Also the report description, owner info can be easily viewed.
To run a FFM Administration 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.
- Click on the appropriate category and select the desired report you would like to run.
- Click Run from the report description panel on your right. A Report window will open.
- Choose the Format Type for the report (PDF, Text Excel, and HTML).
- In the Date Filter, enter the time frame you would like the report to display.
- In Groups, check the Workers or Work Groups you would like to view in the report.
- Click the **OK** button.
- The report will appear in an expanded window.

While this example was done with the Alert Report, ALL reports you run from the Reports Tab will have the same steps.
Stops –

**Stops – All**

The Stops - All report displays each stop made, ordered by worker and arrival time. The information includes worker info, stop type, time duration and location of the stop. Stop type is one of "Location" (see Locations List page), "Job", or "Unknown" (i.e. other)

**Stops - Grouped by Location**

The Stops - Group by Location displays Stops for groups or individuals for the specified time period which have occurred at all locations including those which are named by administrators, unknown locations, or those stops associated with a job. The data is grouped by location and time ordered within that location (known, unknown or Job).

**Stops - Locations and Jobs**

The Stops - Locations and Jobs report displays stops associated with a known location (see Locations List page) or Job. Stops are ordered by worker and arrival time. The information includes worker info, stop type, time duration and location of the stop. Stop type is either "Location" (see Locations List page) or "Job"

**Stops and Travel - Summary by Worker**

The Stops and Travel - Summary report displays a summary of stop and travel information for each worker ordered by worker during the report time period. Information includes mileage driven, percentage of time driving (windshield time %), and the number of location stops, job stops, unknown stops and prohibited stops
Mileage –

**Mileage Summary**

The Mileage Summary report displays a summary of miles driven. The information includes a count of trips, sum of odometer miles, sum of GPS miles, sum of additional expenses and the total reimbursement for each worker for the date range of the report.

**Mileage – Trips by Workers**

The Mileage – Trips by Workers report displays details of each completed trip grouped and summarized by worker. The information for each trip includes the worker, purpose of trip, the start/end date time of the trip, start/end address, the start/end odometer, the reimbursement rate, additional expenses and total expenses for each trip for the date range of the report.

**Mileage – Trips by Jobs**

The Mileage – Trips by Jobs report displays details of each completed trip grouped and summarized by jobs. The information includes worker information, purpose of trip, the start/end date time of the trip, start/end address, the start/end odometer, the reimbursement rate, additional expenses and total expense for each trip for the date range of the report.

**Timesheets**

**Timesheet Detail with Breaks**

This report displays all timesheet actions performed, shift information, and approximate mileage for each worker per day for the specified time period.

**Timesheet Detail with Odometer**

The Timesheet Detail with Odometer report displays shift summary information (time and address), total work/break hours, Odometer and GPS miles. The work hours, break time and miles are aggregated for each worker for the time period that the report was run. This report can be run for any time period for specific groups or the entire company.
Workers –

Activity and Form

The Activity and Form displays all activities found in the worker activity log for all workers in the specified group and Date/Time filter. The report includes the location and time stamp for each activity.

Alerts

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

GPS and Activity

The GPS and Activity displays GPS points (including GPS collection attempts) ordered by worker and time. Information includes time and location of the GPS point, whether the worker was stopped or travelling and whether the GPS is associated with a worker activity such as a Job action or Timesheet action.

Web Application Login

Identifies date/time of a user’s login to the web application during a specified time period.

Stops and Travel – Summary by Worker

This report provides information on mileage driven and percentage of windshield time, location stops, job stops, unknown stops and prohibited stops for each worker of the company. It also displays whether the product was used by a worker for the current day.

Weekly Timesheet with Breaks

The Weekly Timesheet with Breaks report gives daily and total information on pay hours, break hours, overtime and double overtime hours for each worker of the company.

InVehicle Travel Summary
This report displays a summary of daily travel. For each worker, the report displays the run, travel, idle and off times. It also displays the miles run for the day. It can be run for multiple days and multiple users.

**InVehicle Switch**

The InVehicle Switch report display various switch events, the time and location of occurrence as well as the duration between the two events.

**Company –**

**At a Glance**

The At a Glance is a composite report that includes the Company Summary, Payroll, Stops & Travel, Jobs and Alerts reports. It provides a daily detailed information on workers' performance, pay hours, overtimes, jobs performed, mileage driven, stops made and alerts fired.

**Company Overview**

The Company Overview report gives summary information on a company. It displays how many jobs were completed and how many of them were late; total amount of pay and overtime hours for this company; mileage driven and percentage of windshield time; how many prohibited stops were made, total amount of fired alerts and total amount of logged in mobile workers and web users.

**What is a Report Template?**

Report templates pre-define the data that will be shown in a report and how it will be represented

**How to create a customized report from template?**

- Select the **Reports tab**.
- Select the **New Report** button.
• Select from an existing list of reports (templates) and click Create Report.

• Enter the Name of the Report you’re creating and click Save.

You can also create a report from scratch:
Click **Reports > List > +New Report > Custom Report** (under the section “Start from Scratch”) > **Create Report**.

Note – While creating a report

- Choose the Category of information you would like to report on. Most information in the FFM application falls under the Worker category.
- Choose the Sub-category, the subcategory allows you to choose from the pre-defined data views that are available. Many of the data views are named after existing standard reports.
- Choose the Report Type.
  - Tabular: this type of report gives a grid list of all data items
  - Summary: this type of report allows information to be summarized and grouped by.

- Click **Next** to move the **Column Setup** page
  - The column setup page allows the web user to select which columns of information they would like displayed on the report.
- Check the box next to the columns you would like displayed in the report.
- Click **Next** to move the **Summarize Setup** page
○ The summarize setup page allows the web user to choose which fields they would like to view a summary of.

○ Sum, Average, Largest Value, Smallest Value and Count are the available summary types for fields.

**NOTE:** The application will only allow specific summary fields dependent on the type of data of the underlying field.

- Choose any field you would like to summarize on the report.

  Note: Summary is optional and only recommended for Summary reports.

- Click **Next** to move the **Column Order Setup** page

  ○ The column order page allows the web user to choose which order the columns should appear on the report from left to right.

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

- Click **Next** to move the **Criteria Setup** page.

  ○ The criteria setup page allows the web user to specify criteria or rules in determining which value will appear on the report.

- Click **Next** to move the **Set Default Time Frame** page

  ○ This page allows you to set the default run time for the report.

- Click **Next** to move the **Who Setup** page

  ○ Who setup pages allows the web user to specify which groups the report should report against.

  **NOTE:** For the report to return data the report must have at least one group selected.

- Click **Next** to move to the **Sub-report** page

  ○ Sub-reports append other existing reports to the bottom of the report you’re configuring.

  ○ Sub-reports are an Optional part of reports

- You can select up to 5 sub-reports to be run at the end of your configured report.
- Click Save.

How to Schedule Report?

Web users now have the ability to schedule reports to run and be delivered via email to users within their company. Reports can be scheduled to be run on a daily, weekly and monthly basis. Web users can configure the date/filter, group filter, report format and scheduled period for the report to be generated. The report will be put into report generation and delivery queue at the scheduled time. The report will be run and delivered via email after the report has completed being generated.

- To schedule a report, click on the Reports tab. Select the report you want to schedule from the Reports page.
- Click the Schedule button from the right panel. A window will pop up allowing you to specify the details of the scheduled report.
• The range setup page allows you to choose the date/time filter the report will use when it is run.
  o The range setup filter works the same as the Date Filter in the web application.
  o The report can be scheduled to be run with a Fixed or Relative date filter.
    • A relative date range will always run for a relative range. Using a relative date filter for scheduled report is recommended.
    • A fixed date range will always run for the specified period and is not recommended for schedule reports.

• Click Next to move the Who Setup page
  o Who setup pages allows the web user to specify which groups the report should report against.

  NOTE: For the report to return data the report must have at least one group selected.

• Click Next to move the Schedule Setup page
  o The schedule setup page allows the web user to specify the reoccurring schedule of when the report will be run.
  o The report can be scheduled to run:
    • Daily
      ✓ Choose every x days
      ✓ Every weekday
    • Weekly
✓ Choose every x weeks
✓ Choose which days of week

- Monthly
  ✓ Choose every x day of x month
  ✓ The x day of week of every x month

- Choose what time of day the report will run
  ✓ NOTE: Report will be queued to run at scheduled time. Exact delivery time is determined by system load and email timing.

- Choose for the report to end after a specific end date or no end date.

- Click **Next** to move the **Send Setup** page.
  - The send setup page allows the web user to specify the users who will receive the report, the format the report will be sent in (PDF, excel, txt and email), and whether the report should be oriented horizontally or vertically.
Export Report

The export report tab allows the web user to export mobile jobs, mobile timesheets and mobile forms data directly to the excel format.

- **Job Type Export**: The job type export report provides detailed job information, address, and actions.
- **Timesheets Export**: An export report that allows Mobile Timesheets information to be edited and automatically summarized for each shifts and pays period.
- **Form Export**: The form export report provides date/time, location, user, action, mobile jobs, mobile timesheets, and all field information for each form completed.
- **Pay Hours and Forms Export**: The “Pay Hours and Forms Export Report” allows a user to report pay hours and field information that are associated with the pay period. The report displays all workers’ pay shifts, name of user, username, group, pay hours, break hours, start shift, end shift, start shift, and end shift locations, as well as any field that was filled out in a mobile form attached to either the start or end shift.
Edit Report

- You can edit a report from the Reports tab. Select the report you want to edit from under the appropriate category.
- Now click More on the right panel and click to open the drop-down.
- Click Edit to edit the desired report.

Delete Report

- You can edit a report from the Reports tab. Select the report you want to edit from under the appropriate category.
- Now click More on the right panel and click to open the drop-down.
- Click Delete to remove the desired report from the reports list.

Share Report

Using the FFM web application, you will also be able to share a report with the rest of your organization. In order to do that, just click More and select Publish as Report Template from the right panel of the Report page.
14. Alerts

An alert is an automated message to a user or a group that is triggered by a predetermined rule. For example a worker exceeding the speed limit or entering and leaving 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 pre-install a speeding, long stop and prohibited stops alerts 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 /Exit Event
    - Timecard Action Event
    - Job Status Event
    - Job Attribute Event
    - Form Submit Event
    - Job Create Event
    - Assign Job
    - Monitor Job
    - Monitor Worker
    - Monitor Device (Battery Status)

- Pro-active Events
  - Worker Monitoring Alerts
    - Managers can now monitor via pro-active alerts worker compliance and performance in the field. 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
• Working more than 40 hours in the last 7 days.
  o Device Monitoring Alerts
    • Battery charge level of the mobile device to prevent FFM getting shut down due to low battery.

Viewing Alerts

To view an Alert that has been triggered, select the Alerts Tab.

- Click on the Alert you wish to view in the Fired Alerts page. The Options Menu will appear.
- Select the View Alerts button. This will open a window showing the worker and action that triggered the alert as well as the date and time it happened.

Deleting a Alert

- Select the Alerts Tab.
- Click the alert you would like to delete. The Options Menu will appear.
- Select the Delete Alert button.
- Click OK to confirm the deletion.
14.1. Alert Configuration

The Alert Configuration allows you to create, edit and delete Alerts.

Creating Alerts

- Select the “Alert” tab (this tab is only active for an administrator).
- Click on the “Configure Alert.”
- Select the “Create Alert” button and a new window will appear.
- Enter the name you want for the alert; for example, “Speeding.”
- Give a description; for example, “Exceeding the speed limit of 65 mph.”
- Check the “Active” box. If the box is blank, the alert will not be activated.
Select the Type of Alert you want to create

- Click the Next button, A New Alert window will appear.
- Select the New Rule button.
- Select a data type to alert on. i.e. GPS.
- Depending on the data type you select the field option below will change to either Data or Operators. Select one of the options from the pull down i.e. Speed.
- Select a value, i.e. Greater then, select Apply Changes (repeat the steps to add more than one rule to an alert by selecting the new rule button again).
- Select the Next button once you have added all the rules. A new Groups window will appear.
- Select the group or individuals that this alert will apply to.
- Select Next, a new schedule window will appear.
- The schedule window allows you to set the time of days that the alert can be triggered. If left blank it will be 24 hours a day.
- Select Next, an Action Setup Window will appear.
- The Recipient window is where you can select the data type in the alert so when the alert is triggered it will read [Workers username] was exceeding [GPS Speed].
- Select the names on the right as to who is going to 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.

**Editing Alerts**

- Select the Alerts Tab from the Field Force Manager main menu.
- Click on the Configure Alerts button from the toolbar found in the Alerts page.
- Select the Alert you would like to edit. The Options Menu will appear.
• Click the **Edit Alert Configuration** button. A new alert window will open. Use the tabs to edit the parts of the Alert that you need to edit.

• When complete, with the step you can click **Next** to review the other steps or **Save** to exit.

![Alert Configuration Window]

**Deleting Alerts**

• Select the **Alerts** Tab from the Field Force Manager main menu.

• Click on the **Configure Alerts** button from the toolbar found in the Alerts page.

• Select the Alert you would like to delete. The Options Menu will appear.

• Click the **Delete Alert** button.

• Click **OK** to confirm the deletion.

![Alert Configuration Window]
Copying Alerts

- Select the Alerts Tab from the Field Force Manager main menu.
- Click on the Configure Alerts button from the toolbar found in the Alerts page.
- Select the Alert you would like to Copy. The Options Menu will appear.
- Click the Copy Alert button.
- Click OK to confirm the copy.
15. Messages

The Messages tab allows you to send messages to any of the mobile workers. This is strictly a one-way messaging service. Message option is only available with Field Force Manager Mobile Basic and Premium/Pro.

Within the messages tab you will see three buttons: Inbox, Sent and Deleted:

Creating a Message

- Select the Messages tab.
- Click the Create Message button from the toolbar found in the Messages page. A new message window will appear.
- Select the worker or workers you would like to send the message to.
- Enter a subject and the text of the message.
- Click the Send button at the bottom of the window.
Sent Messages

- Select the Messages tab.
- Select the sent messages button.
- Click on the name of the worker you sent the message to. It will then show you what the message said.
- When done viewing the message click the message tab to return back to the messages page.

Deleting a Message

- Select the Messages tab.
- Select the checkbox to the left of the message(s) you would like to delete.
- Click the Delete button.
- A delete confirmation box will appear select OK.

You mobile worker will receive this message only when the phone communicates with the Field Force Manager server. Your mobile worker will get a new message notification on the phone screen. Now select the Messages icon from the Field Force Manager main menu on your phone. You will see the Message page on your phone screen. Now select the appropriate message to view the Message detail screen.
16. Support and Training

Support

To get support on Field Force Manager, click on the Support link in the upper right hand corner of the web application.

Please refer to the below hyperlinks for your respective Support & Training sites.

Support Link: http://support.fieldforcemanager.com/index.htm
Appendix A

Map Controls

Maps Navigation
The Maps tab gives you a map view of where your mobile workers are currently located, and also shows the location of all Locations 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 web application. You can view the map in Traffic, Map, Satellite, Hybrid and Terrain view. Click on the Show Traffic icon to get the traffic updates displayed on the map.

Playback Controls
In the Workers Map page, click on the play icon to start the interactive map and you will see the animated route of the selected field worker.
Then, click on the Location Playback Controls to view the animated route of the selected user(s):

Follow the below instructions to use the Location Playback Controls:

- Click on the button to start the animate route of the selected user(s).
- Click on the button to pause the animate route view.
- Click on the button to view the animate route in fast forward mode.
- Click on the button to stop the animate route view.

Street View
View the street view of your worker’s location using street view feature powered by Google maps. Use the icon on the normal map and drag and drop the Street viewer icon on any desired location of the map.

**Zoom Toolbar**
The zoom toolbar is displayed on the upper left-hand side of the map. Use the zoom toolbar 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 zoom toolbar or click the + icon.
- **To zoom out**, click below the current position of the marker on the zoom toolbar or click the – icon.
- You can also zoom in or out of an area by scrolling in or out with the mouse wheel; or, double click a spot on the map to do a quick zoom.
- You can also click on the Drag Zoom In icon just below the Zoom toolbar. Then drag on any portion of the map to display the zoomed view of that selected area.

**Draggable Maps**
“Draggable maps” allow you to move around any of the maps in Administration 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, updated icons will appear for your workers and locations.

**Refit Map to Data**
Use this feature to bring back the focus on all your data in the map. For example if you are in the location map then clicking on Refit map in the toolbar will show you all your locations in your map. The same is applicable in workers map too.

**Limited Items**
To make sure the maps are fast and easy to use, the Administration will display no more than 1000 items of any given type at one time. For example, if a map has 1500 Locations, the map will display 1000 Locations max. The map will also 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 into a specific geographic area or use the Group and Location filters to restrict items displayed on the map.

**Find Address**

This feature is used to view a specific address on the map. Click on the **Find Address** button found at the top right hand of your map from the maps pages. The Find Address pop-up box appears in your computer screen. Enter the desired address and click **Go**.

**Map icon Menus**

Whenever you see a map in Administration, you can click on any icon on that map to display the information attached to that icon (Location or Worker) and bring up a pop-up Menu. In the pop-up Menus, you will find quick links to the different options attached to the icon.

**Export Map**

The **Export Map** feature allows you to export data from Administration 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 Locations and Worker positions from Field Force Manager 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 as workers.
Note: Third party software and online services are not provided by Field Force Manager 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 Field Force Manager, it is no longer subject to Field Force Manager privacy policy. The provider’s terms of use and privacy policy should be carefully reviewed before such use.

Exporting a map to KML

- Open the map you want to export in Field Force Manager.
- Click the Export button found in the Toolbar on the left-hand side of the screen.

- Click on Export to KML file. A small window will appear asking if you would like to save the file to your computer.
- Click Save.
- The file will now download onto your computer.
- When finished downloading, double-click the file to open the file in any software that can open KML files.
### Status Icons

#### Location Status

<table>
<thead>
<tr>
<th>Icon</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="company" /></td>
<td>Company</td>
</tr>
<tr>
<td><img src="image" alt="customer" /></td>
<td>Customer</td>
</tr>
<tr>
<td><img src="image" alt="general" /></td>
<td>General</td>
</tr>
<tr>
<td><img src="image" alt="prohibited" /></td>
<td>Prohibited</td>
</tr>
<tr>
<td><img src="image" alt="vendor" /></td>
<td>Vendor</td>
</tr>
</tbody>
</table>

#### Worker Status

<table>
<thead>
<tr>
<th>Icon</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="logged_in" /></td>
<td>Logged In</td>
</tr>
<tr>
<td><img src="image" alt="logged_off" /></td>
<td>Logged Off</td>
</tr>
<tr>
<td><img src="image" alt="on_shift" /></td>
<td>On Shift</td>
</tr>
<tr>
<td><img src="image" alt="on_break" /></td>
<td>On Break</td>
</tr>
<tr>
<td><img src="image" alt="on_a_job" /></td>
<td>On a Job</td>
</tr>
<tr>
<td><img src="image" alt="device_not_sending_info" /></td>
<td>Device is not sending information.</td>
</tr>
</tbody>
</table>

#### Job Status

<table>
<thead>
<tr>
<th>Icon</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="assigned" /></td>
<td>Assigned</td>
</tr>
<tr>
<td><img src="image" alt="new_job" /></td>
<td>New Job</td>
</tr>
<tr>
<td><img src="image" alt="active" /></td>
<td>Active</td>
</tr>
<tr>
<td><img src="image" alt="completed" /></td>
<td>Completed</td>
</tr>
<tr>
<td><img src="image" alt="retrieved" /></td>
<td>Retrieved</td>
</tr>
<tr>
<td><img src="image" alt="in_transit" /></td>
<td>In Transit</td>
</tr>
<tr>
<td><img src="image" alt="accepted" /></td>
<td>Accepted</td>
</tr>
<tr>
<td><img src="image" alt="rejected" /></td>
<td>Rejected</td>
</tr>
<tr>
<td><img src="image" alt="started" /></td>
<td>Started</td>
</tr>
<tr>
<td><img src="image" alt="on_hold" /></td>
<td>On Hold</td>
</tr>
</tbody>
</table>