

FFM

FIELD FORCE MANAGER WEB MANAGEMENT APPLICATION GETTING STARTED

This document provides tips and responses to frequently asked questions to help you quickly get up to speed with key features of the Field Force Manager Web Management Application

Top Tips

Setting Up Users and Devices

Update Your Users Page Information (Administration > Users Page)

First and Last Name information is pre-populated based on your initial order information. By clicking on a **User** you can easily edit their name, create a nickname, assign them to a group and define their role.

From this page you can also add web application users individually or import a list of web application users by clicking the Upload Users button.

Correctly Set Security Roles

(Administration > Users > Create User)

As an administrator, when you create a new web application user, it is important to correctly set the user's security settings. You can configure each role to allow—or restrict—access to certain functionality and work groups.

- > To prevent unauthorized changes to your account, limit the number of **Super Users** you create.
- > When creating a custom security role, make sure that it includes the group(s) to which a user belongs.

Review Your Device Information

(Administration > Devices)

The **Devices** page displays a list of the user devices configured based on your initial order information, including their phone number, the FFM software package they are using and the version of the mobile app. All this information is required if you need to call Customer Support for assistance regarding the device.

- > We recommend updating the **Description** field with the device user's name by clicking on the device row and selecting **Edit Device**.

Using the Web Application

Setting Group Filters

You can filter the information by groups, date/time, and the icons displayed on the web application.

- > After creating a new group, you must select it in the Group filter to be able to view it.
- > Make sure that you select all options available in the Group and Display filters, unless you want to limit the amount of data you view.

NOTE: Once you have made changes to the filters, they remain in place until you change them again.

Assigning Workers When Creating New Jobs

When you are creating a job, be sure to select the assigned worker's name from the drop-down menu. If you leave the field blank, the job will be categorized as 'unassigned' and will not be issued.

Configuring Alerts

The web application provides predefined real-time alerts for a number of events and conditions. You can also create custom alerts to meet your specific business needs. You can have alerts displayed on the web application, sent to others via email or text, and summarized in reports.

In order for someone to receive an email alert, their email address must be included in their User Profile.

Using Reports

The Reports tab contains a list of predefined reports. You can create your own custom reports as well. Reports can be pulled any time or scheduled and can be exported to PDF, Excel, HTML, and text formats.

- > To prevent "unknown location" from appearing on reports, make sure that you have named your commonly visited **Locations**.
- > **Locations** can also be categorized as customers, vendors, your organization's buildings and more.

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Frequently Asked Questions

I have forgotten my password. How do I retrieve it?

Click Forgot Password on the login page, and enter the email address associated with your account. You will receive an email with a link that takes you to a page where you can reset your password.

Why does a web application user receive an invalid login message when attempting to log in?

First validate that the username and password they are using is correct. Also, double-check the **Security Role** you have created to make sure it includes the group you selected for the user.

Why am I unable to view workers that appear on the Worker list?

Make sure that you have selected all relevant groups in the Group filter. Check to be sure that you have selected the correct status(es) in the Display filter. The filter must reflect the status of the person you are searching for.

The screenshot shows a toolbar with the following elements:

- Toolbar** (dropdown menu)
- Create User** (button)
- Delete User** (button)
- Upload Users** (button)
- Date Filter** (dropdown menu)
- Today (selected)
- 07/30/2013 Start
- 07/30/2013 End
- Group Filter** (dropdown menu)
- Search** (dropdown menu)
- Users (selected)
- Search** (button)

How can I quickly check to see where a worker has gone during the work day?

If GPS is enabled, you can view a worker's movements on the Worker Map by following these steps:

1. On the Worker list, click the name of the worker.
2. Click View Worker Map.
3. Choose the date from the Date filter and press OK.

NOTE: You can search only one day of activity at a time.

Or, you can pull one of these pre-defined reports:

1. The GPS and Stop Report, which you create from the Worker list
2. The GPS and Activity Report, which you create from the Reports tab

NOTE: The GPS and Stop Report is designed to run for a single day and single user because of the large amount of GPS data it reports.

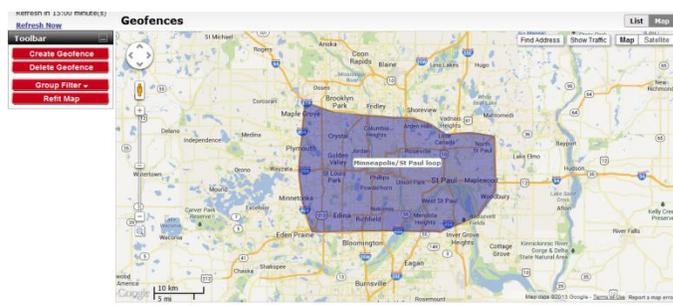
What is the difference between Locations and Location Type?

Locations are specific names associated with physical addresses. They can be manually entered or uploaded from a spreadsheet. **Location Types** are categories you can apply to your locations, such as **Customer** or **Vendor**.

What's the difference between a Geofence and a Workzone?

A **Workzone** is automatically created when you set up a defined and provides the ability to see when a worker is entering or leaving the area close to the **Location**.

A **Geofence** can be manually created and typically covers a much larger geographical area than a **Workzone**. Its boundaries are easy to configure and see on a map.



*NOTE: You can define a real-time alert for both a **Location** and a **Geofence**.*