# Field Force Manager
# Web Portal User Guide

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# General Information

## System Requirements

Mobile phone
- Verizon Wireless Field Force Manager compatible mobile phone. For listing of Field Force Manager mobile phones go to http://support.fieldforcemanager.com

Computer
- Field Force Manager is a web based application and requires connectivity to the Internet. High speed internet access is recommended. The following are requirements for accessing the Field Force Manager website:
  - Internet Explorer 7, 8 or newer
  - Firefox 2, 3 or newer
  - A screen resolution of 1024X768 or higher is recommended

## Privacy & Mobility

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

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

## Driver Distraction

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

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### MANDATORY SAFETY GUIDELINES

- When driving, always keep the phone charging and safely stored.

- Field Force Manager must not be used by the driver while the vehicle is in motion.

- Field Force Manager must be used outside of the vehicle, or while the vehicle is stationary.

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## Customer Support

Customer support is available through your web portal Support and Training links

**Field Force Manager Application**
- o Web Portal URL **–** https://www.fieldforcemanager.com
- o Links to Support and Training are located at the top right of the screen

**Customer Support**
- o Customer Support Site – http://support.fieldforcemanager.com or through Support Link in the web application.

## Copyright Information

# Field Force Manager Customer Web Portal Website

## Logging In

1. Open a supported Web Browser.

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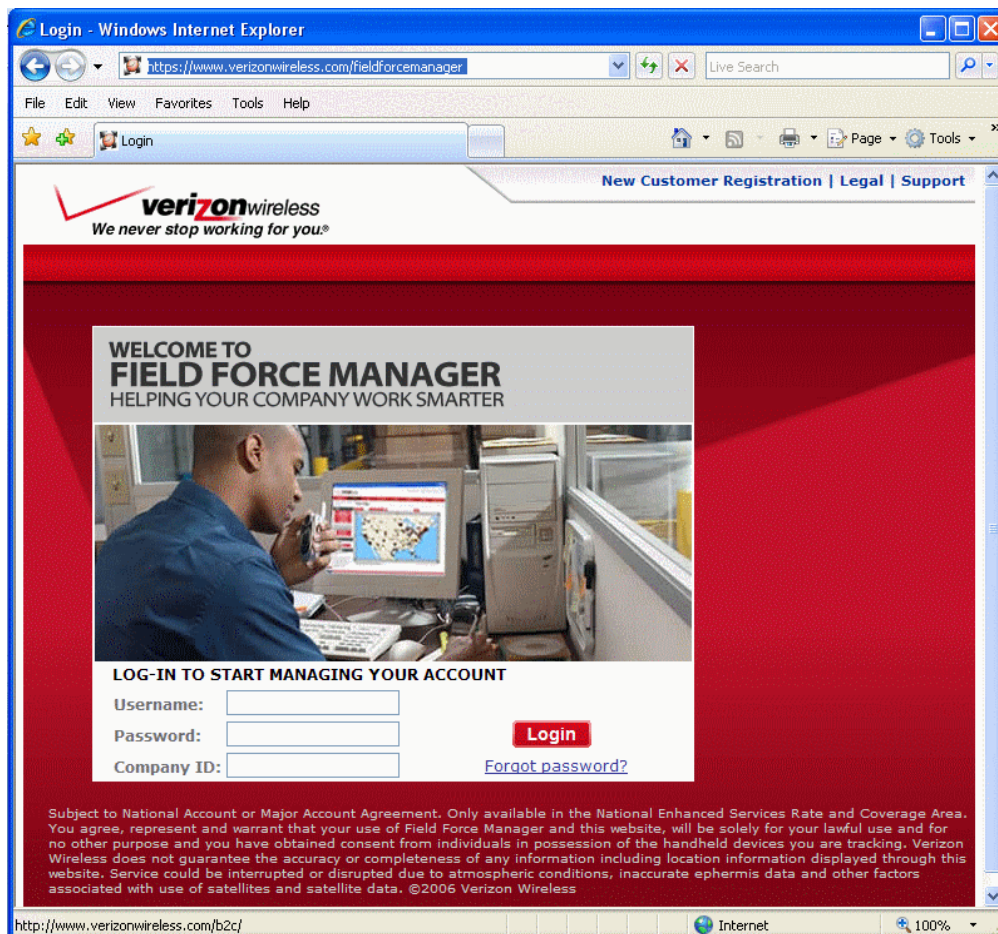


3. Using your Field Force Manager login credentials, enter your username, password and company id. Note: Login information is provided to the main point of contact for your company in the Web Portal Information spreadsheet that was emailed when your company was first set up by Field Force Manager.

   USERNAME:
   PASSWORD:
   COMPANY ID:
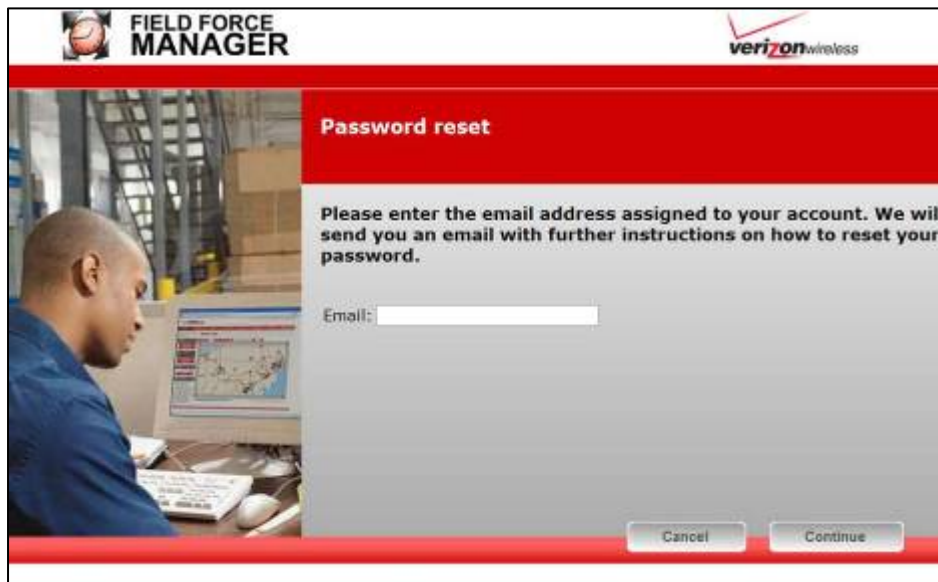
4. Click the **Login** Button



5. The system will then complete the login process.

## If you forget your password

1. Click on the **Forgot Password** link under the **Login** button. A Password restore screen will open.

2. Enter the email address assigned to your account.

3. Click **Continue**.



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

## Account Lockout

- If you attempt and fail to login six times with the same username/company ID your user account will be locked.  You will need to enter the text from an image in addition to your password to log into the system.

# First Time Setup Wizard

The first time that any web user logs in, a setup wizard will run asking that user to fill out Profile information. This will ensure that a user's name, time zone and email address are correct. The first web user to log in as an "Administrator" for a company will be presented with the full version of the First Time Setup Wizard. This setup wizard helps configure a company's account to take advantage of some of the most popular features.



## Profile

This step allows the web user to make sure their web profile is setup correctly.  The user can set their name, time zone, email address and request that alerts be sent to their email address. This element will open to all web users.

## Mobile Workers

Typically on first time login the names of the workers are set to their mobile phone numbers.  This allows the web user to rename the workers to the proper name of the worker or their vehicle and to set the time zone for each worker.

This tab also contains a menu where the language can be set from English to Spanish for the prompts and menus on a users' mobile device. If a user's language is set to Spanish, that user will receive a notification of the change in language. Mobile Worker information can also be configured in the Users tab in the web portal.

## Industry Smart

Getting started with Field Force Manager has never been easier.   The Field Force Manager software has a powerful set of forms, alerts, job types and reports that can be configured to meet your needs. Web administrators now have the ability to choose from industry oriented configurations for their Field Force Manager company account.  The system will automatically install a configuration based upon the selected industry.  Users can further change the configuration through the existing configuration tools.

## Settings

This step allows the user to configure the days and time when the application will locate mobile workers. The user can set the start and stop time for GPS collection and choose the days/times (Hours of Operation) when the application should start up. The option of Auto Shutdown after Hours of Operation is also available on this screen.

### Device Power Settings

The Device Power Settings - located in the settings tab - allows web users to change the GPS send rate for devices in their company.   The power settings options changes how often GPS points are sent to the web portal.

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

## Scheduled Reports

This step allows a web user to setup the At a Glance daily summary report to be sent to them.

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

# Field Force Manager Web Portal Interface

This section gives a general overview of the Web Portal interface and navigation.

## Tabs

There are eight major tabs in the Web Portal - Workers, Maps, Jobs, Locations, Messages, Reports, Alerts and Administration. The tabs available are determined by the Field Force Manager package your organization has purchased.
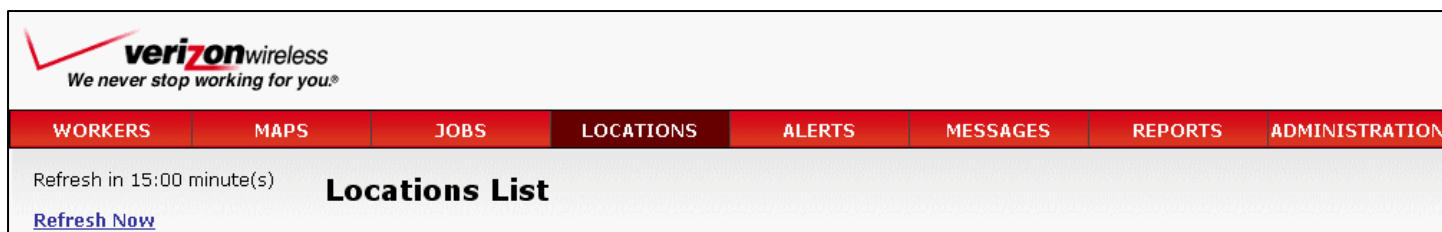


## Refresh

The Web portal displays the most recent information upon request. Refreshing the Web portal does not pull information straight from the mobile device, but shows what has been communicated to the Field Force Manager database since the last "refresh" period. Further, any task you might be working on in the Web Portal is not disrupted by this process, giving you updated information without interrupting your work.



Even when you are not interacting with the Web portal, it will automatically "refresh" every 15 minutes to show you the most recent information on the Field Force Manager server. The Web portal also displays a countdown clock so you know how many minutes remain until the next "refresh." (Note: The 15-minute time period is a default setting that can be changed in **My Settings** under the Administration tab.) If you want current information without waiting for the automatic refresh, click the **Refresh Now** link to display the most recent field data from the Field Force Manager system.

Upon refreshing, list items that have changed will be highlighted for 4 seconds. Lines that flash green are new items that have been added to the list (e.g. a new job added by another Web portal user); lines that flash yellow are items that were present but have changed on the list (e.g. a worker has a new GPS point); and lines that flash grey have been removed from the list (e.g. a deleted or reassigned job). The flashing of these items can be turned off in **My Settings** under the Administration tab.

# Options Menu

Whenever you see a list in Field Force Manager, clicking on an item in that list will open up an Options Menu. In the Options Menu, you will find quick links to the different functions attached to the item you clicked. The picture below shows a Workers List. Clicking on a specific Worker in that list has made an Options Menu appear. To access a specific function, click on the option you want (e.g. if you want to see a worker's map, click on View Worker Map). To cancel out of an Options Menu, click on the X.

# Map Tab

## 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 Jobs and 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 Portal. 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.
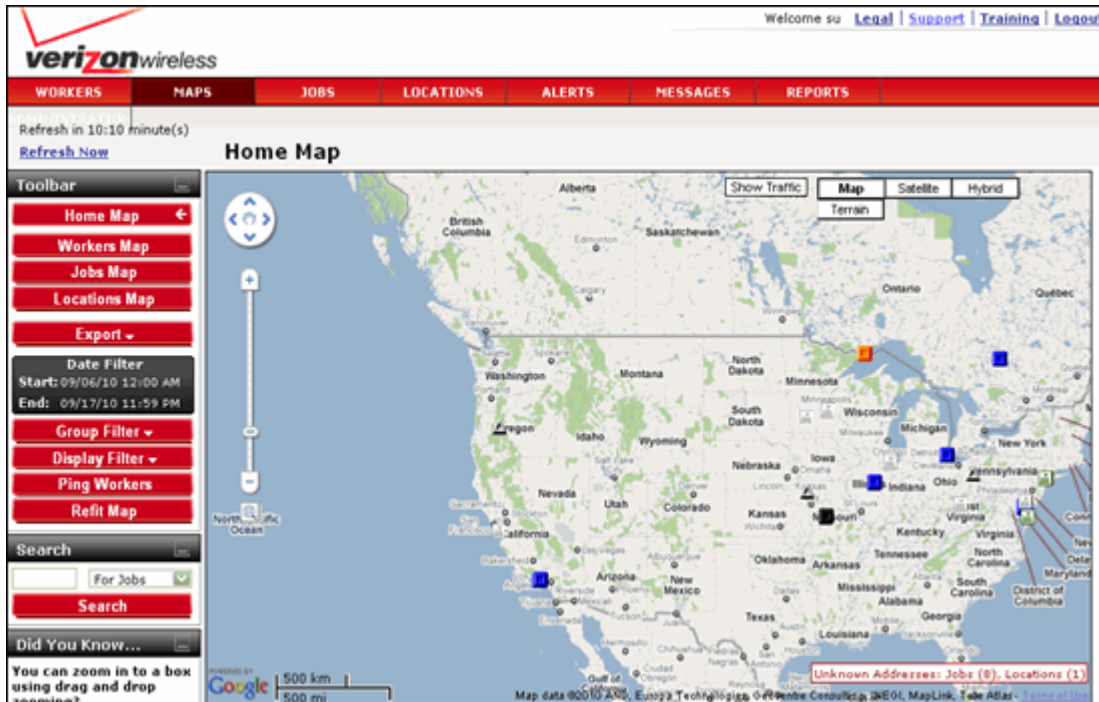


## Zoom Toolbar

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.
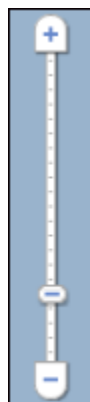
- **To zoom in**, click above the current position of the marker on the zoom toolbar or click the + icon.
- **To zoom out**, click below the current position of the marker on the zoom toolbar or click the – icon.

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 [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 Field Force Manager quickly and easily. To view an adjacent area of a map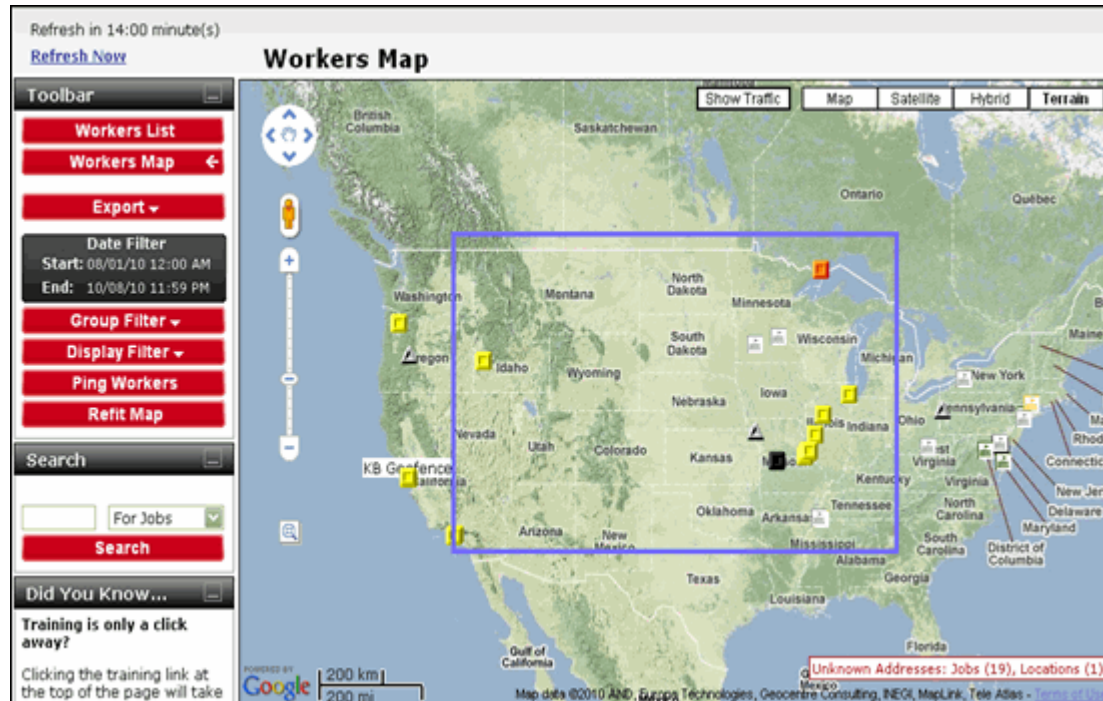, "grab" the map by clicking and holding down the left mouse button. As you hold down the button, move the mouse as if your hand was on the map, "dragging" the map to the area you would like to view. A moment after "dragging" the map, updated icons will appear for your workers, locations and jobs.

## Refit Map to Data

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



## Limited Items

To make sure the maps are fast and easy to use, the web application will display no more than 1000 items of any given type at one time. For example, if a map has 1500 Locations and 200 jobs, the map will

display 1000 Locations and 200 jobs. 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.

## Map icon Menus

Whenever you see a map in Field Force Manager, you can click on any icon on that map to display the information attached to that icon (Location, Worker, or Job) 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.
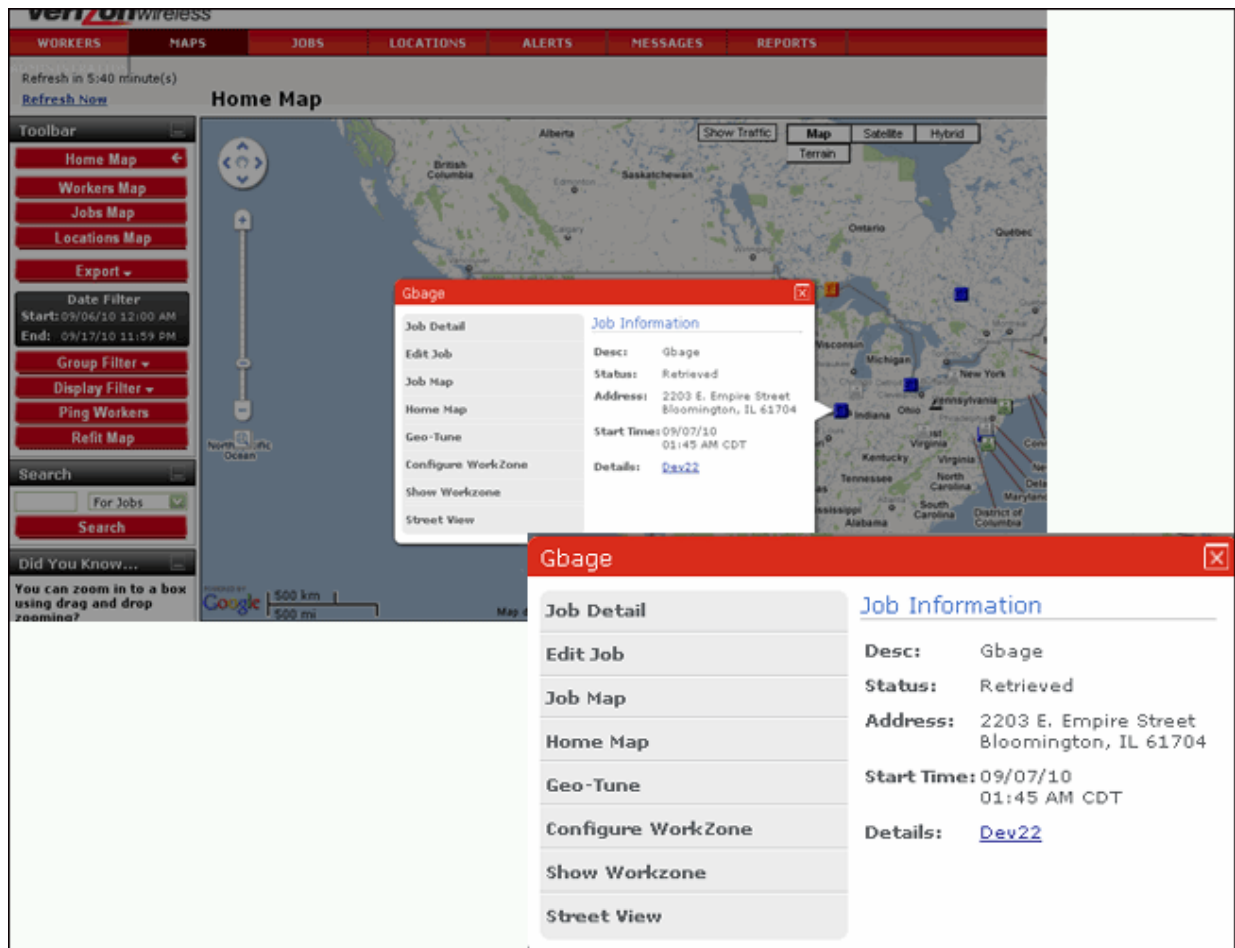


## Export Map

The **Export Map** feature allows you to export data from Field Force Manager to a KML file. KML files allow the map data to be viewed in third party software and online services such as Google Maps, Google Earth, ESRI, AOL MapQuest, Microsoft MapPoint and Yahoo. This lets you view saved Locations, Job sites and Worker positions from FFM 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/jobs/etc. move or change status.

***Note:** Third party software and online services are not provided by Verizon Wireless and their use is subject to terms required by the software or service provider. If an exported KML file is used with

software or online services not provided by Verizon Wireless, it is no longer subject to Verizon Wireless privacy policy. The provider's terms of use and privacy policy should be carefully reviewed before such use.

## *Exporting a map to KML*

**To export map data to KML file.**

1. Open the map you want to export in Field Force Manager.

2. Click the **Export** button found in the Toolbar on the left-hand side of the screen.



3. Click on **Export to KML file**. A small window will appear asking if you would like to save the file to your computer.

4. Click **Save.**

5. The file will now download onto your computer.

6.  When finished downloading, double-click the file to open the file in any software that can open KML files.


**\*\*\***To view a Field Force Manager map in any third party software (Google, ESRI, AOL MapQuest, Microsoft MapPoint or Yahoo), that party's software must be installed on your computer before the map is viewable.
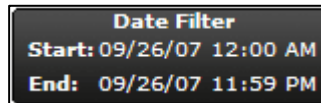
# Filtering, Sorting, and Searching

## Filter

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

## Date/Time Filter

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

1. In the Tool bar on the left hand side of Field Force Manager, find the **Date/Time** filter.



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

3. In Field Force Manager there are two types of date/time filters:
a. 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 Portal by adjusting the date to the current data and time.

b. 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.



4. Select the appropriate date/time settings, and select the **OK** button.

**Note**: Field Force Manager Web Portal will remember your last date and time filter setting the next time you log into Web portal. Ensure the date and time filter is set to the date and time range you would like to search for before you view information.


## Work Groups Filter

The Work Groups Filter will allow a user to view data in Web Portal for the group(s) selected. Additional work groups can be added through the web portal administration tab.

1. On the left side within the Toolbar of Field Force Manager, find the Work Groups filter.

2. Check or uncheck the appropriate boxes next to the divisions/groups to view specific data for the work groups selected.
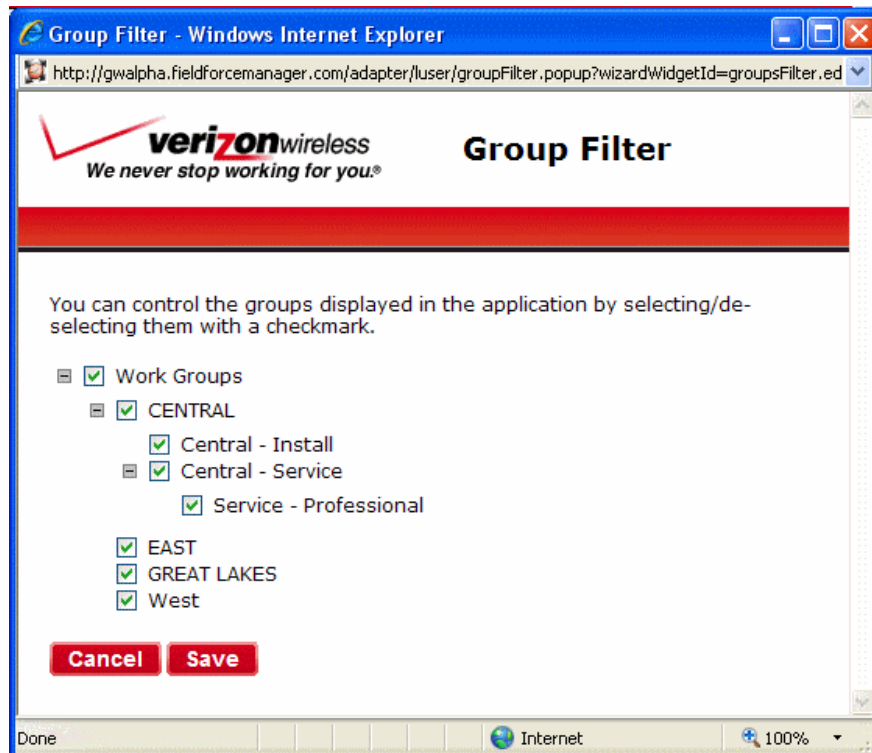
3. Click the **SAVE** button to make your selection.

**Note**: Field Force Manager Web Portal will remember your last work group filter setting the next time you log into Web portal.  Ensure the work group filter is set to the date and time range you would like to search for before you view information.
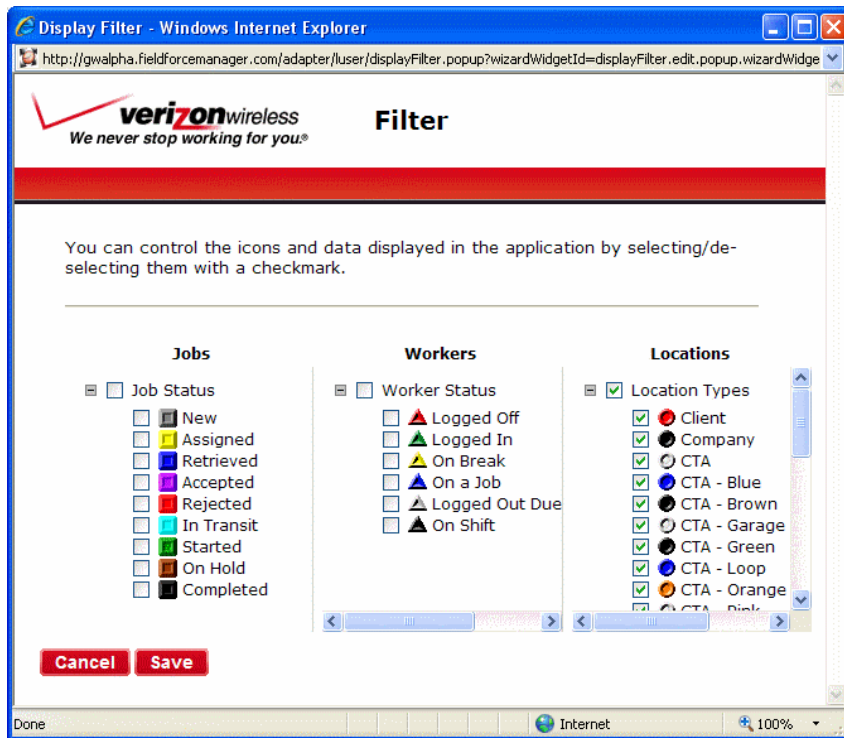
## Display Filter

On the maps, jobs, workers or locations tab, the Display filter will be displayed in the toolbar "Display Filter" of Web Portal.   This will allow a Web Portal user to view a subset of data based on the filtered settings.  The display filter controls the display of workers, locations, jobs, geofences, labels, and GPS, stop and action information on the map.

1. Click on the **Display Filter** button and the worker status/symbology filter will be displayed.



2. Check or uncheck the appropriate checkboxes and press the **Save** button. Or **cancel** to make no changes.

**Note**: Field Force Manager Web Portal will remember your last display filter setting the next time you log into Web portal. Ensure the display filter is set to the date and time range you would like to search for before you view information.

### Sort

Within each tab of the Web Portal a user can sort the data by the column headers displayed.

For example, if a user wants to display the workers in ascending order by workers name they would do the following:

1. Select the **Workers** tab.
2. Click on the Name column header.

A downward arrow will appear next to the column name when the user is sorting in ascending order.



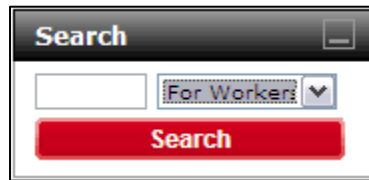An upward arrow will appear next to the column name when the user is sorting in descending order.



### Search

Use the following procedure to find a specific worker, job, or location.
1. In the Search field enter the search criteria.

2. Select the item from the pull-down menu.



3. Select the **Search** button.  The search results will appear in the search window.

# Workers Tab

The workers tab is used to monitor your mobile workforce. All of the information on this screen is displayed as soon as the application uploads the information. From this tab, you can see whether or not a worker is in cellular and/or GPS coverage (indicated by the Stoplight), the workers name, which division they belong to, their last known communication status and their last known location date and time. The final column shows how many pay hours a mobile employee has in the current week. When navigating in the workers tab, ensure your filters are set correctly to view the information you are looking for.



## Stoplight

The Stoplight feature shows the connection status of your workers' mobile devices. This is displayed with two colored circles. The first circle (the Communication Stoplight) signifies the phone connection status of that worker.

Green indicates that the mobile phone has communicated with the server in the last 65 minutes.

Red indicates that the mobile phone has *not* communicated with the server in the last 65 minutes. That worker's Status will be changed to "Logged Out Due to Inactivity."

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

Green indicates that a valid GPS point has been received in the last 65 minutes.

Yellow indicates that a valid GPS point has *not* been received for over 65 minutes but the communication status with the workers device is still good.

Red indicates either that the worker has logged out or that the last communicated GPS point warned of an error due to GPS restriction or low battery in the device.

| | |
|---|---|
|  | Last Device communication and GPS point within 65 minutes. |
|  | Device communication but no GPS point within the last 65 minutes. |
|  | Last Device communication within 65 minutes but GPS is restricted or has a low battery. |
|  | Check worker Status. If **Logged Out Due to Inactivity**, worker has not properly logged out and Device has not communicated in over 65 minutes. |
|  | Check worker Status. If **Logged Off**, the program on the Device has been properly exited by the worker. |

### Name

The name column displays the name of the worker. For an in-depth view of a specific worker, you can click on that worker's name. This will bring you into that specific worker's details. Here you can view the worker activity log, locations, jobs, worker details and that specific workers map.

### Status

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

**Logged in:** Logged into Field Force Manager and GPS points are being collected. At this time the worker is not using timesheets.

**On Shift:** Logged in to Field Force Manager and worker has started their shift by using the timesheet "Start Shift" functionality.

**On Break:** Logged in to Field Force Manager and worker has started their break by using the timesheet "Start Break" functionality.

**Logged Out Due to Inactivity:** The application has not communicated with server in the last 65 minutes. Worker likely has powered phone down without exiting Field Force Manager.

**On a Job:** Logged in to Field Force Manager and actively working on a job.
**NOTE:** Only in the Premium Package

**Logged Off:** The worker has logged off by exiting the application from the main menu. This signifies the application is off and GPS points are no longer being collected.

## Location

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

| Last Location | Location as of |
|---|---|
| Stopped: 0:11 hrs Location: EddiePuckett--1264 Stonewood Ct<br>1264 Stonewood Ct<br>Arnold, Maryland 21409 | 09/27/07<br>05:03 PM CDT |
| Stopped: 0:11 hrs Location: Unknown<br>2401 S Venoy Rd<br>Westland, Michigan 48186 | 09/27/07<br>05:13 PM CDT |
| Traveling: 0:11 hrs<br>20124 7 Mile Rd W<br>Detroit, Michigan 48219 | 09/27/07<br>04:31 PM CDT |

**NOTE:** Job stops are only available in the Premium package.

## Pay Hours

The Pay Hours column displays how many pay hours each mobile employee has worked during the past week. This column will update every fifteen minutes to give you current and accurate information during

your workers' shifts and work week.  The start day of the week for calculating pay hours can be set in the Company Settings.

## Worker Map

If you would like to see a map of where your workers are currently, click the Workers tab and then the Worker Map button in the toolbar of the Web Portal.  To aid in locating workers, Logging in or out, Starting or Ending a shift or break, or filling out a form will make an icon appear on the map, pinpointing when and where a worker performed one of those actions (see icons below); GPS points are also collected and shown on the map when a worker first logs in.

| | |
|---|---|
|  | Worker has Logged in |
|  | Worker has Logged out |
|  | Worker has Started a shift |
|  | Worker has Ended a Shift |
|  | Worker has Started a Break |
|  | Worker has Ended a Break |
|  | Worker has Submitted a Form |

From the map, you can also set the following filters: Locations, Jobs, and the Worker filter, to see only the data that is important to you.  All of the map controls work the same throughout Web Portal.  To get back to your list of Workers, click the Worker List button, or click on the Workers tab.

## Activity Log

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 **View 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 software will show you a Login, Start Shift, End Shift, Exit Field Force Manager (if you using timesheets).  There is also an Activity filter which allows you to specify which actions you would like to view such as, Timesheets, Log in/Log out, GPS errors/Ad Hoc Forms.
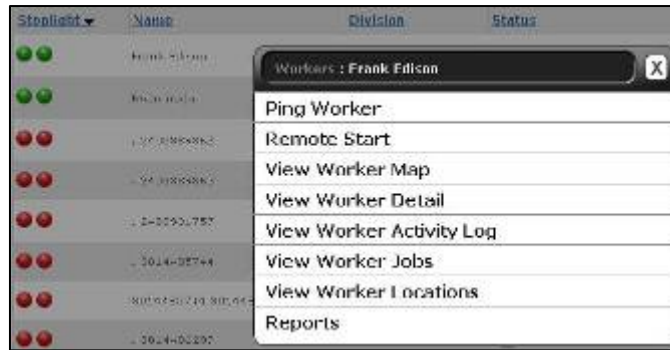
## Worker Locations

In the Workers tab, if you click on a worker's name, the Options Menu will appear. Clicking on the **View Worker Location** option will show you any locations that have been set up in Web Portal and sent to that worker's mobile phone.

## View/Edit Worker Timecards

In the Workers tab, if you click on a worker's name, the Options Menu will appear. Clicking on the **View/ Edit Worker Timecards** option will show you the workers timecards for the filtered time period and allow you to edit and view timecard edits.



## Editing a Timecards

1. Select the shift you would like to edit

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

3. Select **Edit Shift**

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



- Each timecard action must be separated by at least one minute
- Timecard shifts cannot overlap

5. Select **Save** when changes are complete

## Adding a Shift

1. Press the **Add Shift** Button

2. Edit the starting time and date
   i. You can add the end date / time or leave open

3. Select **Save**

## Viewing Timecard Edit History

1. Select the shift you would like to view edit history for

2. Click the row of the row you would like to view (you can only view one shift at a time). The Timecard Options Menu will appear.

3. Select **View History**



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**Worker**

### Jobs

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

### Time-Off

In the Workers tab, if you click on a worker's name, the Options Menu will appear. Clicking on the **Times Off** option will bring you to the Time off list for the Worker. Time off is used to change the workers availability for scheduling 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**

6.  Select the Create Time-off button on the Workers Times Off List
7.  Select the Start and End date and time for the time off.
8.  Select a reason and enter notes in necessary
9.  Select Save & Close



## Worker Details

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 Jobs, Locations and Maps from the Worker Details window in the Toolbar on the left side of the screen.

## Ping Worker / Ping Workers / Auto Ping

Field Force Manager 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 portal immediately. (GPS information will only be sent if the device is in a location where GPS information can be collected.)

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

**Ping Workers:** The worker map and work list has a 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 workers selected in the multi-worker ping we upload their GPS coordinates each minute for the following ten minutes.
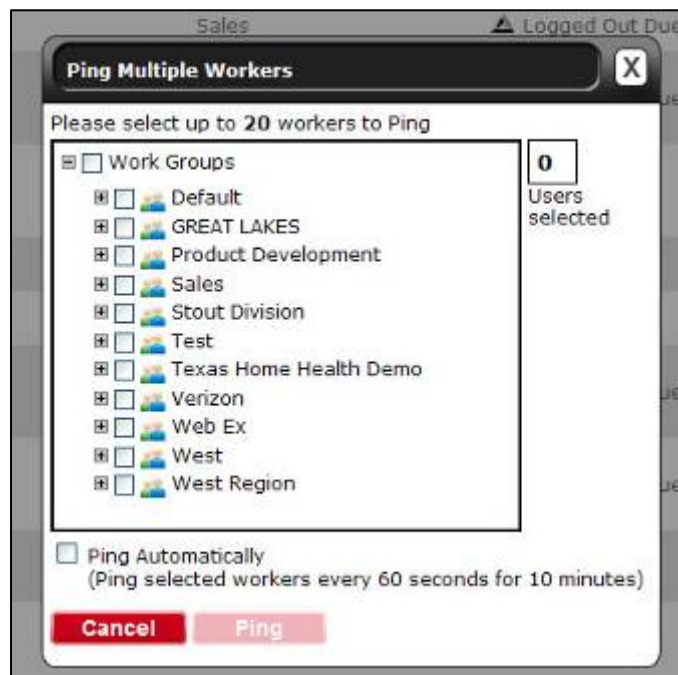


## Worker Map

In the Workers tab, if you click on a worker's name, the Options Menu will appear. Clicking on **View Worker Map** will display the last known location of this specific worker. You can also view the bread-crumb 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 displayed. Now Select Show Routes.
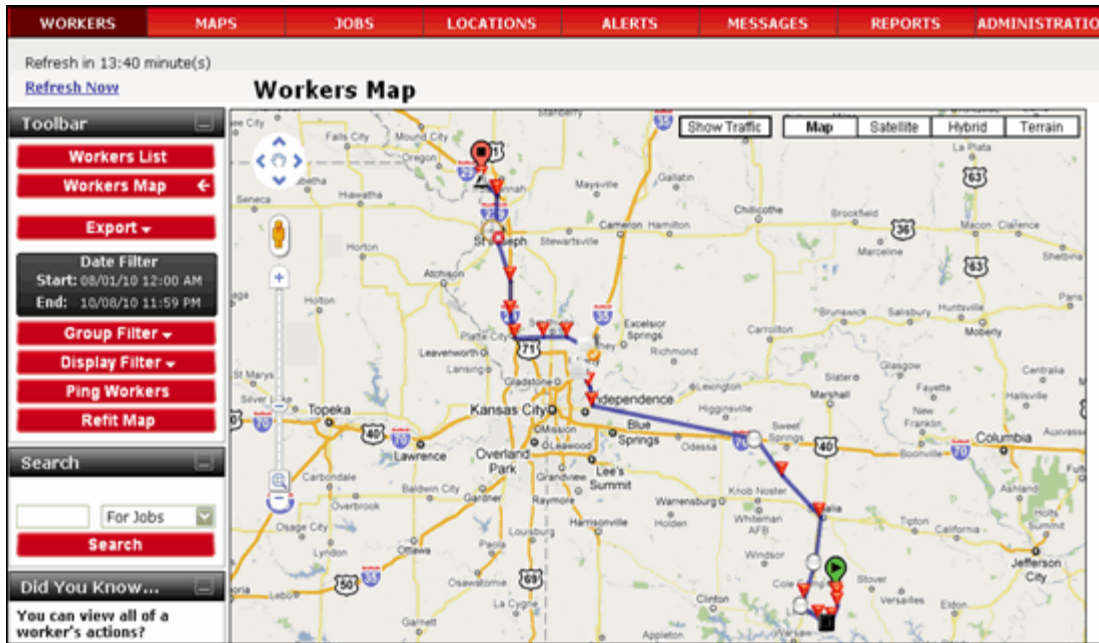
In this Routes page, click on the ▶️ icon to start the interactive map and you will see the animated route of the selected users on your computer screen.

In this new FFM map feature, we have added new option to view the animated route of your field workers. Click on the Workers icon and select Animate Route from the list.
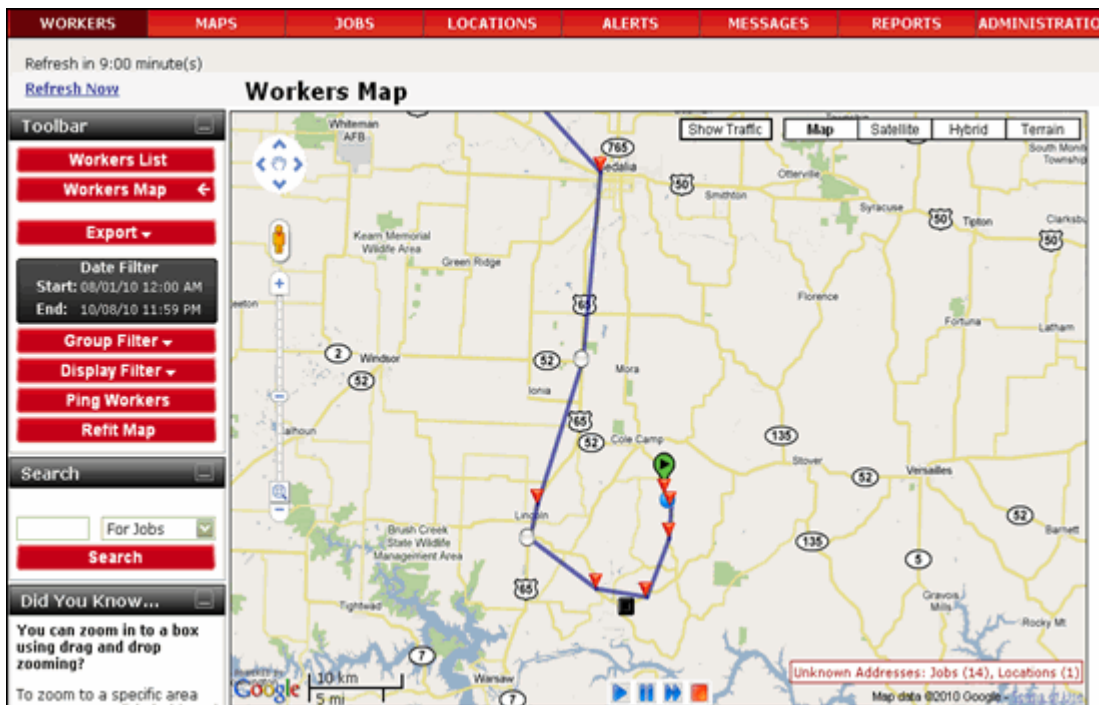


Then, click on the Location Playback Controls ▶️ ⏸️ ⏩ ⏹️ to view the animated route of the selected user(s):

Follow the below instructions to use the Location Playback Controls:

¨      Click on the ![play] button to start the animate route of the selected user(s).

¨      Click on the ![pause] button to pause the animate route view.

¨      Click on the ![fast forward] button to view the animate route in fast forward mode.

¨      Click on the ![stop] button to stop the animate route view.

**Street View**

In this Google Map, Field Force Manager offers you to get the street view of your fleet's location. Click on the Workers icon from the Workers Map. Now select Street View from the Pop-up window.
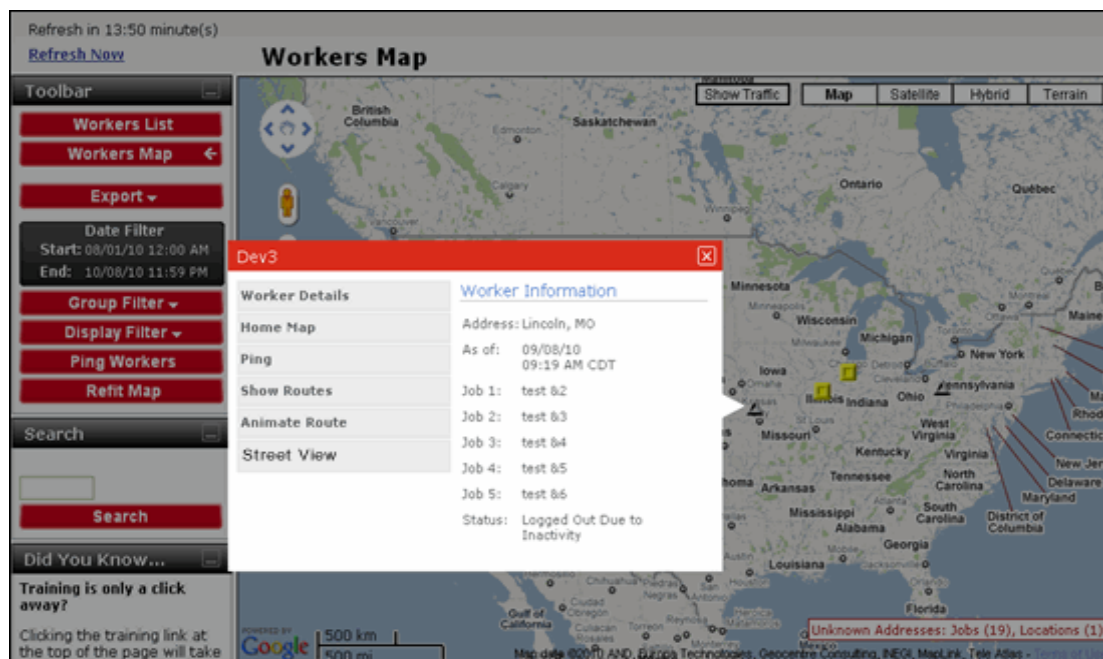


You will be presented with the street view of the location of your mobile worker.

You will also find the Street viewer ![icon] icon just above the Zoom toolbar. Now drag and drop the Street viewer icon on any desired location of the map. You will get the Street view of that particular area displayed on your computer screen.

## Auto Application Start Up

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.)

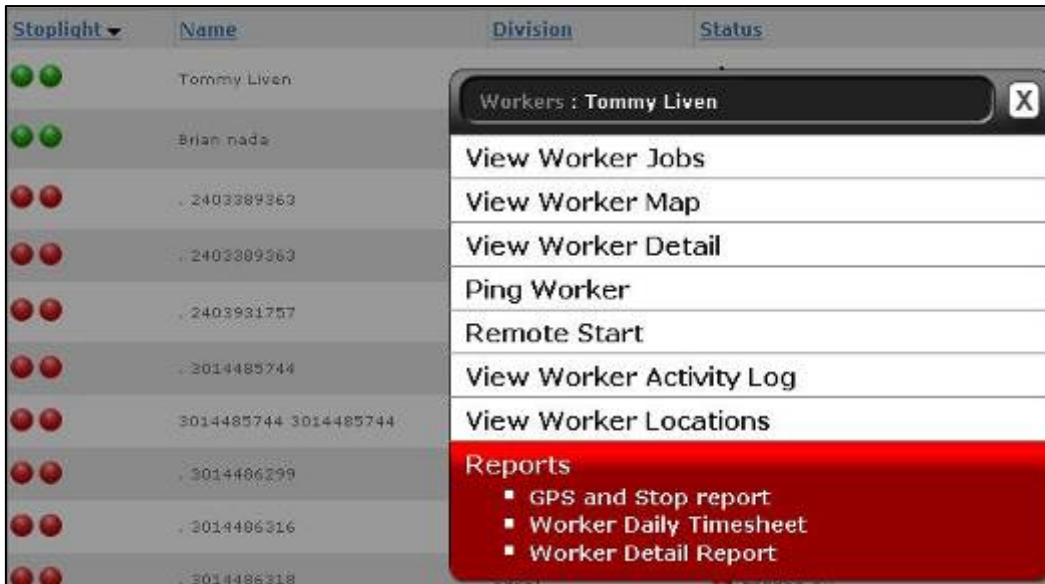## Worker Daily Timesheet Report

The Worker Daily Timesheet 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.  It displays total pay hours, number of stops, travel distance, travel time, and total time at stops.  This can help when dispatching workers to jobs throughout the day.  To run this report, click on a name from the Worker List. When the Options Menu appears, select **Report** and then click on Worker Daily Timesheet.

## Worker Detail Report

The Worker Detail Report displays jobs completed by that specific worker, Start and End Date/Time, and the Duration of the job. It also totals the number of 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 jobs, as well as averages the amount of time spent per job. To run this report, click on a name from the Worker List. When the Options Menu appears, select **Report** and then click on Worker Detail Report.

## GPS and Stop Report

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 Worker List. When the Options Menu appears, select **Report** and then click on GPS and Stop.
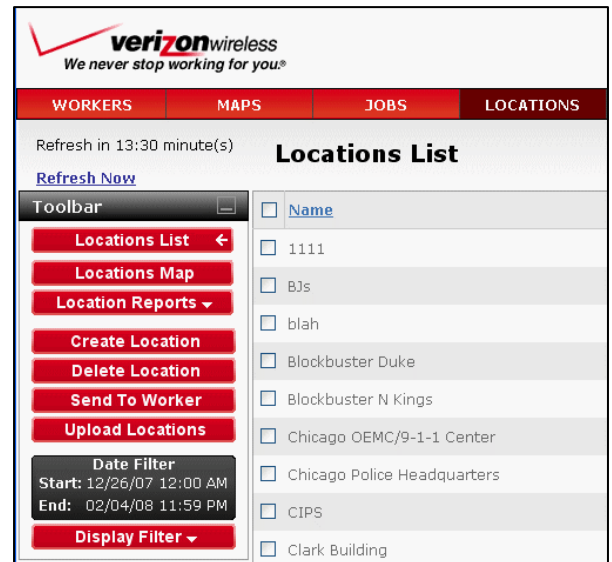
# Locations Tab

The locations tab is used to maintain locations or customers for your company.  For example, this can be vendor sites, worker's homes, or any other location a worker might frequently stop.
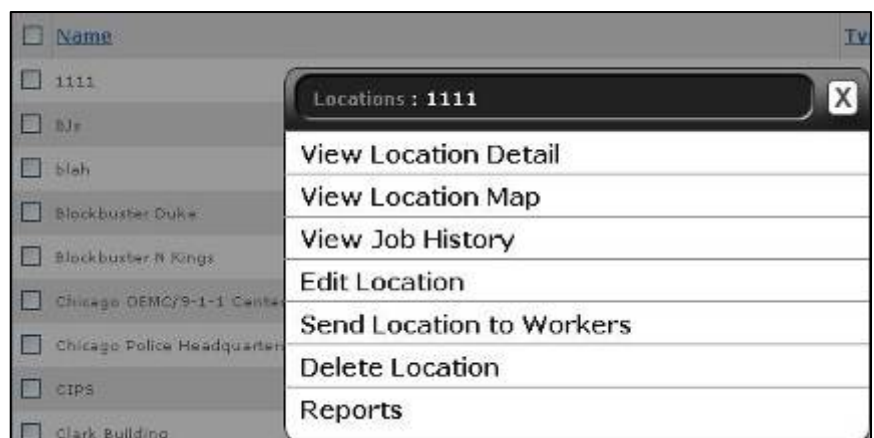
## Creating a Location

1. Select the **Locations** tab

2. Click the **Create** button.  A create location window will appear.

3. Select the type of location you are creating from the Type drop-down box.

4. Enter the name and address of the location.  That is the minimum amount of information required to create a location.

5. Click the **Create** button at the bottom the window to create the location.

   

6. To view any of your locations on the map select the location(s) and click the Map button.

7. To view the details of your locations select the hyperlink associated with that location name in the location list.

## Editing a Location

4. Select the **Locations** tab.

5. 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.

6. Select the **Edit Location** button. An Edit Location window will open.

7. Make the desired changes and click the **save** button at the bottom of the window.


## Deleting a Location
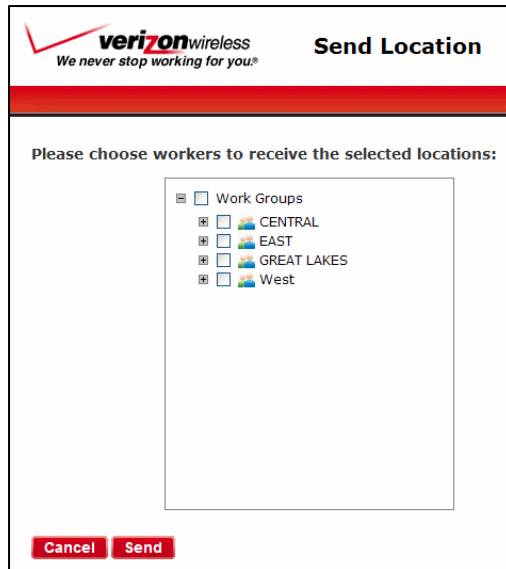
1. Select the **Locations** tab.

2. Click the Location you would like to delete. The Options Menu will appear.

3. Select the **Delete** button from the Options Menu.

4. A confirmation window will appear to confirm that you wish to delete the selected locations. Click **OK** to delete the location(s).

## Sending a Location to a mobile worker

(Sending a location to a worker is in Field Force Manager Basic and Premium Only)

1. Select the **Locations** tab.

2. Select the Location you would like to send to your worker. The Options Menu will appear.

3. Click the **Send to Workers** button in the Options Menu. A Send Locations to Workers window will appear.

4. Click the checkbox to the left of each workers name you wish to send the location to.

5. Click **Send**.



If Field Force Manager is running in the foreground of the worker's mobile phone, their mobile phone will beep letting them know they have a new location. The worker can then access the Locations menu on their mobile phone and get driving directions to that location from their last known GPS location.

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

## Viewing Location Detail
This feature allows you to view the specific information attached to a location.

1. Select the **Locations** tab.

2. Click on the Location you would like to view the Location Detail for; the Options Menu will appear.

3. Select the **View Location Detail** button from the Options Menu. You will be taken to the Location Detail screen.

## 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 Package**

1. Select the **Locations** tab.

2. Click on the Location you would like to view the Job History for; the Options Menu will appear.

3. Select the **View Job History** button from the Options Menu. You will be taken to the job history screen.

## Geo-tuning a location or job

Geo-tuning is used to tune the latitude and longitude of a location or job.

To Geo-tune a Location or Job

1. Click on a Location or Job

2. Select "Geo-Tune" from the pop-up menu

3. The mouse cursor will turn into a target

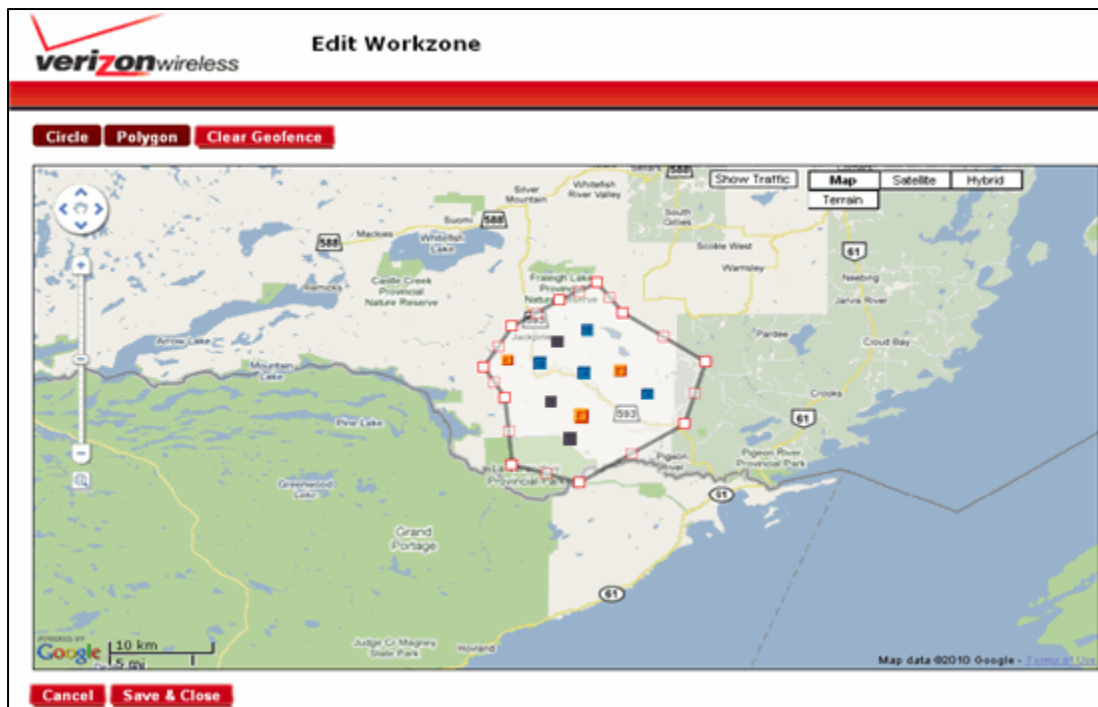4. Click on the map where you would like to move the Location or Job to.



## Configuring a WorkZone for a location or a job

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

To Configure a WorkZone:

1. Click on  the desired Location or Job

2. Select **Configure WorkZone** from the pop-up menu

3. A **Configure WorkZone** window will open, showing the icons from the currently viewed map

4.  Create a circle or polygon WorkZone or make the necessary adjustments to an existing WorkZone.

5. Click the **Save** button.

**Upload Locations**

1. Select the Upload Locations button


Upload Locations

2. Select the "Get Template" button to download location upload template
3. Unzip XLS, CSV and txt file to local computer
4. Enter Locations into XLS or CSV file, Save the file
5. Select the "Browse" button
      a. Select the file with data to be uploaded
6. Check Update Records box if you want to update records if they're the same
7. Select the "Submit" button.

The following information is available to be uploaded for a location:
  • Name(Required)
  • Street Address (Required)
  • City
  • State
  • Zip
  • Country
  • Latitude
  • Longitude
  • Contact Name
  • Contact Phone
  • Location Type (Required to match existing Location Type)

# Messages

The Messages tab allows you to send messages to any of the mobile workers.  This is strictly a one-way messaging service. Field Force Manager must also be running in the foreground of the mobile phone to be notified immediately of new messages. Field Force Manager does not use Verizon Wireless text messaging to send messages.  Messages are in Field Force Manager Basic and Premium only.

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

❖ The **Inbox tab** is where any messages that were sent to the users will appear. Clicking on a message will open the Options Menu, giving the option to **Read** or **Delete** it.

❖ The **Sent tab**, allows you to view any messages that you have sent, who the recipient was, and the date and time that the message was sent.

❖ The **Deleted tab** allows you to view any messages that you have deleted.
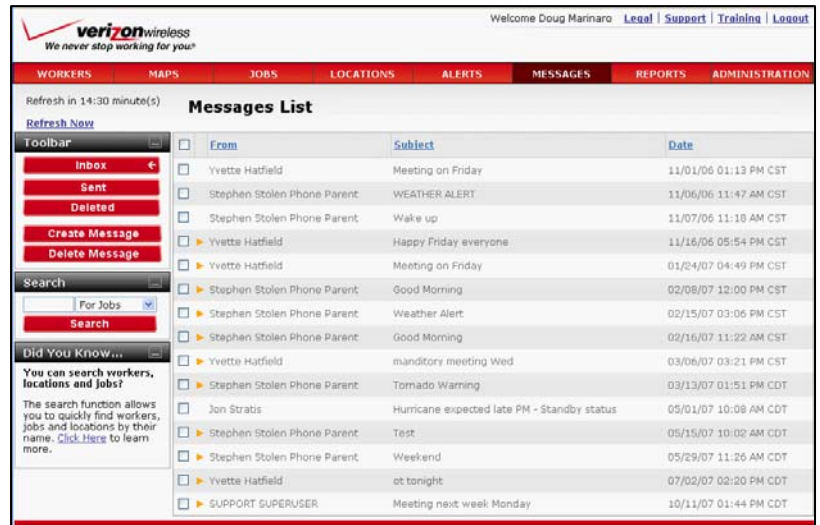
## Creating a Message

1. Select the **Messages** tab.

2. Click the Create button. A new message window will appear.

3. Select the worker or workers you would like to send the message to.

4. Enter a subject and the text of the message.

5. Click the Send button at the bottom of the window.

## Sent Messages

1. Select the **Messages** tab.

2. Select the **sent messages** button.

3. Click on the name of the worker you sent the message to.  It will then show you what the message said.

4. When done viewing the message click the message tab to return back to the message list.
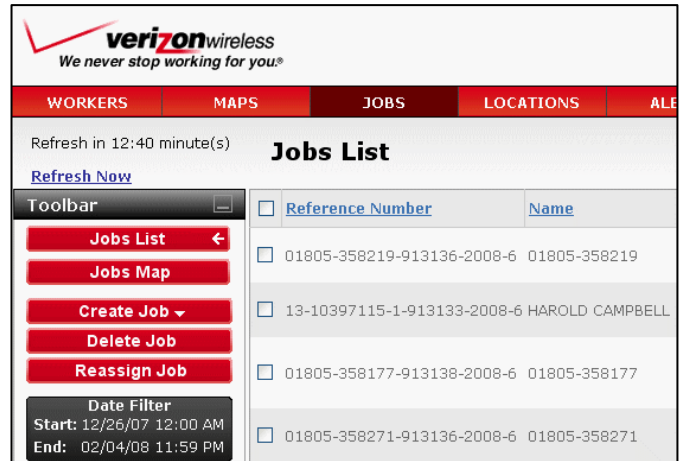
## Deleting a Message

1. Select the **Messages** tab.

2. Select the checkbox to the left of the message(s) you would like to delete.

3. Click the **Delete** button.

4. A delete confirmation box will appear select OK.

# Jobs Tab

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

**Premium:** Advanced job dispatch from the Web portal to mobile user. The Web portal user can look up and link jobs to known locations in the system, which reduces data entry and errors. The Web portal user can view all jobs or single jobs on all maps, read details of a job, call ahead to a job contact, and obtain both audible and map-enabled driving directions to the job. The mobile user can update the job status ("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 "Jobs" list or via the "Location Job History."
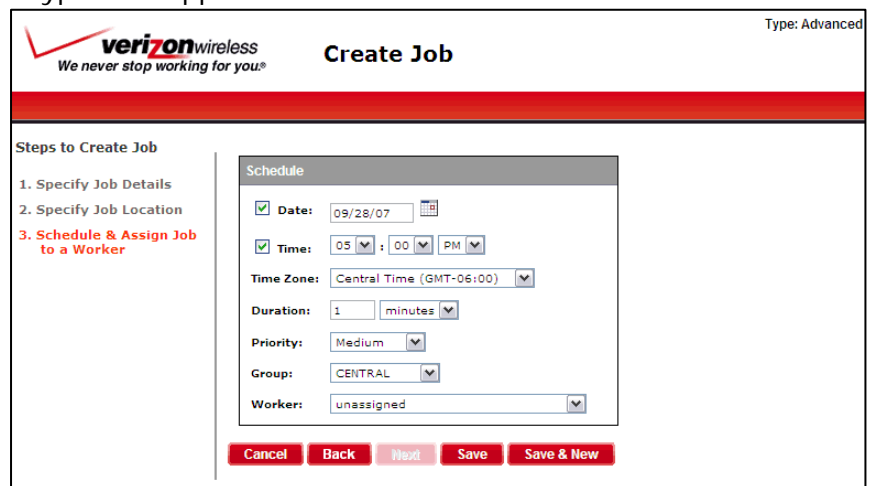
### Creating Jobs

1. Select the **Jobs** tab.

2. Click the **Create** button, a list of job types will appear.

3. Fill in the necessary job details.

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

4. 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.

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

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

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

8. Fill in the necessary job details.

    a. The Job Name is the name that is displayed to the mobile worker.  Choosing a name that is descriptive like the Customer Name or the Type of Service is recommended.
    b. The Job reference number is a unique number for the job.  You can enable the system to automatically generate job reference number in the company settings part of the web portal.
    c. The details will be different based upon the job type selected.


9. When finished entering the Job Details, click **Next** to move to the Parameters screen.

10. Select which skills are required for the job

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

12. 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.

13. Select the duration of the job.

14. Select the job priority.

15. 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.

**Recommend Worker**
    a. 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.
    b. Once a worker is selected from the recommend list
    c. 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 jobs assigned to the worker that have not been completed. This includes 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

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

## Linking Jobs to Customers

1. Enter the name of the Customer you want to look up and link the job to.  After you enter three characters, the system will present a list of matching Customers.  Using your mouse or the keyboard arrow keys, select the customer you would like to link the job to and hit the enter button.

2. The contact and address information for the Customer will be populated into the job.

## Editing Jobs

1. Select the **Jobs tab.**

2. Click the job that you would like to edit. The Options Menu will appear.

3. Select the **Edit Job** button. A new edit window will open.
4. Edit any of the necessary information throughout the tabs.



5. Click Save when finished editing.

## Deleting Jobs

1. Select the **Jobs tab**.

2. Click the job you would like to delete. The Options Menu will appear.

3. Select **Delete Job button.**

4. A Delete confirmation box opens.  Click the OK button.

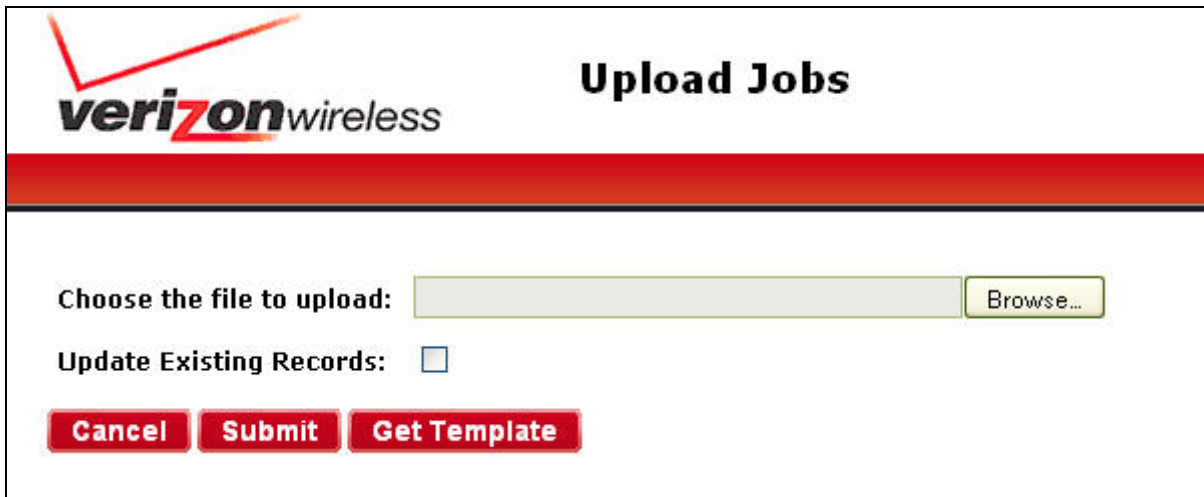
## Reassigning Jobs

1. Select the **Jobs tab**.

2. Click the job that you want to reassign. The Options Menu will appear.

3. Select the **Reassign Job button**; a new reassign window will open.

4. Select the new group or worker to reassign the job to.

5. Click **OK.**


## Uploading Jobs

1. Select the **Jobs tab**.

2. Click Upload Jobs button.

3. 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 Basic** package, then enter "**Basic**" in the Job Type Column.



4. Click **Browse** to upload. Click **Submit.**

This will inform the new assigned worker of the job and download the job information to their mobile phone.  It will also remove the job from the original worker's mobile phone.

**Viewing Job Details**
1. **Select the** Jobs Tab**.**

2. **Click on the Job that you want to see more detail for; the Options Menu will appear.**

3. **Select the** View Job History **button. The Job Details screen will open.**

**Viewing the Job Activity Log**
1. **Select the** Jobs tab**.**

2. Click on the Job that you want to see the Job Activity Log for; the Options Menu will appear.

3. Select the **View Job Activity Log** button. The screen for the Job Activity Log will open.

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

1. Select the **Jobs tab**.

2. 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.

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

The Availability Calendar uses a concept of a timeslot to aide in the dispatch of 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 affect any schedule exceptions made in the time off system.  Each time slot has a capacity of 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 jobs that start in other time slots or the actual start times of jobs.
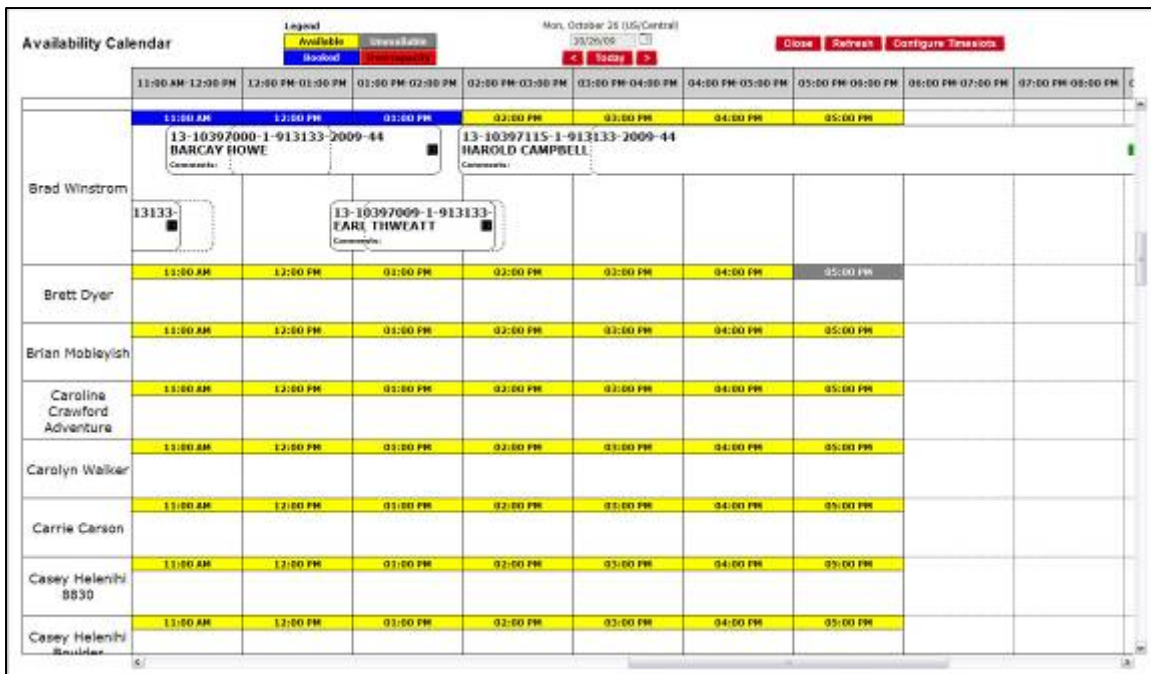


### Time slot color codes

- o **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
- o **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 jobs for the worker.
- o **Booked (Blue) –** The time slot for the worker had availability, but the availability for the time slot has been filled.
- o **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.

## Jobs on the Calendar

- o 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.
- o 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.
- o The current status of a job on the calendar can be determined by looking at the icon that appears on the job. This is the same icon that appears for jobs on the jobs list or map.
- o 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.
- o To make changes to jobs on the calendar the user can edit the job from the mouse over menu or from the job list screens.

## Configuring Timeslots

- o By default a company is configured with time slots for Monday-Friday 8am to 6pm.
- o Timeslots are used to manage the capacity and assignment of jobs for your workers. Choosing small time slots allows you to manager down to the hour. Choosing larger time slots allows you to manage at a multi-hour level.
- o 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

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

**To delete a time slot**

1. Select Time Slot from the select list
2. Choose Delete Time slot button
3. Select Save & Close to save your changes.

## Worker & Job Match

To aide in the dispatch of the right worker to right job the web portal allows worker and jobs to have defined skill sets. The web user for the company can configure which skill sets are available to be set up for workers and jobs within the company.

## Creating a Skill

1. Select the **Worker & Job Match-Skills** Tab.

2. Select the **Create Skill** button; a create window will open.

3. Give the skill a unique name, description and code.



4. Click **Save & Close** when completed.

# Reports

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

To run a Field Force Manager report:
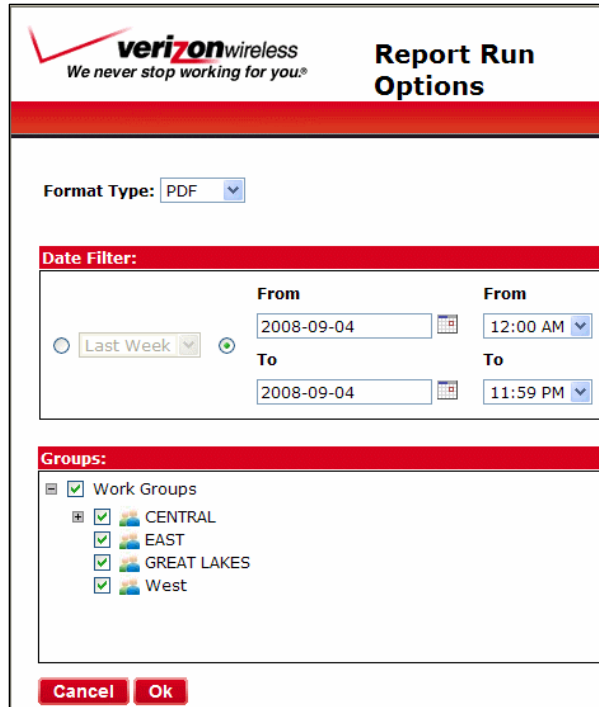
❖ While the example below shows how to run the Alert Report, ALL reports you run from the **Reports Tab** will have the same steps.

1. Click on the name of the report you would like to run. The Options Menu will appear.



2. Click **Run Report** from the menu. A Report window will open.

1. Choose the Format Type for the report (PDF, Text Excel, and Web).

2. In the Date Filter, enter the time frame you would like the report to display.

3. In Groups, check the Workers or Work Groups you would like to view in the report.

4. Click the **OK** button.

5. 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.

## Alert Report

The alert report displays all of the alerts that fired for a company 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, the alert message as well as the date / time the alert was fired.

## Customer Report Card

The customer report card displays a graded summary of how well workers are using their mobile application. Users are graded by the number of errors during the specified period of time.   Mobile workers errors include (low battery, GPS restrictions, not logging out or ending a timecard shift)

## Device Tab Export

The device tab export report displays all of the information from the device tab in a reportable/printable format.

## Fleet Daily Timesheet

The Fleet Daily Timesheet report will display an overview of how each worker's time was spent throughout the day.  It will show what time each worker started their day, how many stops they made, mileage that was driven each day, how many hours the worker logged, and what time each worker ended their day.

## Fleet Timecard Detail

The Fleet Timecard Detail report can be run for any time period for a group or company.   The report details for each worker all timecard actions performed shift summary information of pay hours, break time and estimated mileage.  The total pay hours, break time and mileage are aggregated for each worker for the time period that the report was run for.

## Fleet Trip Report

The Fleet Trip report will display each worker and the percentage of time spent traveling and the percentage of time spent stopped.  Under the Stop Information header, it displays the number of stops, the total time stopped, and the average time at each stop.  Under the Travel Information header, it displays total time traveling, the average time traveling to each stop, the total distance driven, and the average distance between each stop.

## Fleet Weekly Timesheet

The Fleet Weekly Timesheet report will display each worker's hours for a week or week(s) specified in the Date/Time filter.  It also displays the number of stops; the average amounts of time spent at each stop, mileage driven, and pay hours.

## Job Summary

The Job Summary report gives you the average scheduled duration of a job and the actual duration of that job and what actions have been taken against that job i.e. in transit, complete etc.

## At a Glance Report

What is keeping track of the key performance indicators of your company was as easy as reading an email; it is now that easy!  A new standard reports that provides the web portal users with all of the key performance metrics measured by the Field Force Manager application.

## Location Stop Report

The Location Stop Report displays each workers number of stops, the duration at each stop and the travel time and mileage between stops that day. It also lists the address of each stop, so you can see if they have stopped at a prohibited location or an unknown location.

## User Tab Export

The user tab export report displays all of the information from the user tab in a reportable/printable format.

## Worker Activity Log Report

The worker activity log report displays all of the activities found in the worker activity log for all workers in the current group and date-time filter.  The report has now been modified to include the location information/address for each activity.

## Worker Summary

The Worker Summary report will display the number of jobs per worker, the average duration or each job, how many jobs the worker was late on completing and what percentage are being completed late.  It then combines these totals so then you could see for example the percentage of jobs that are not completing on time etc.

## Worker Timesheet / Stop Report

The worker timesheet / stop report modifies the existing "Worker Daily Timesheet" report and allows the user to run the report for multiple workers across multiple days.  The report will display the "Worker Daily Timesheet" report for all workers in the current group filter and will display the stops and payroll information for the date/time range for each worker based upon the date/time filter

## Configurable Reporting

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



### Creating a Report

1. Select the **Reports tab**.

2. Select the **Create Report button**; a new window will appear.



3. Enter the Name of the Report you're creating
4. Choose the Category of information you would like to report on.   Most information in the Field Force Manager application falls under the Worker category.
5. Choose 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.
6. Choose the Report Type.
   a. Tabular: this type of report gives a grid list of all data items
   b. Summary: this type of report allows information to be summarized and grouped by.

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

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



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

11. Click **Next** to move the **Column Order Setup** page
    a.  The column order page allows the web user to choose which order the columns should appear on the report from left to right.



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

13. Click **Next** to move the **Criteria Setup** page
    a.  The criteria setup page allows the web user to specify criteria or rules in determining which value will appear on the report.
    b.  A report can have several criteria for each report. To add additional criteria, choose the new field button; choose the data type, data, operator and value to evaluate against. Once you have completed a criteria, press the apply button to add to the report.

14. Click **Next** to move the **Who Setup** page
    a.  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.

15. Click **Next** to move to the **Sub-report** page
    a. Sub-reports append other existing reports to the bottom of the report you're configuring.
    b. Sub-reports are an Optional part of reports
    c. You can select up to 5 sub-reports to be run at the end of your configured report



16. Click **Save** to save the report
    a. NOTE: The report is not saved until the save button is clicked and the window is closed.
    b. To run the report you just created, click on the name of the report in the report list.

## Scheduled Reporting

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.

1. To schedule a report, click on the Reports tab. Select the report you want to schedule from the Report list. The Options menu will appear.
2. Click the **Schedule Report** button from the Options Menu. A window will pop up allowing you to specify the details of the scheduled report.
3. Enter a name for the report you're scheduling. The report will appear in the list on the Reports tab once the Scheduled report has been saved.
4. The range setup page allows you to choose the date/time filter the report will use when it is run.
   a. The range setup filter works the same as the Date Filter in the web portal application.
   b. The report can be scheduled to be run with a Fixed or Relative date filter.
      i. A relative date range will always run for a relative range. Using a relative date filter for scheduled report is recommended.
      ii. A fixed date range will always run for the specified period and is not recommended for schedule reports.



5. Click **Next** to move the **Who Setup** page
   a. 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.

6. Click **Next** to move the **Schedule Setup** page
   a. The schedule setup page allows the web user to specify the reoccurring schedule of when the report will be run.
   b. The report can be scheduled to run:
      i. Daily
         1. Choose every x days
         2. Every weekday
      ii. Weekly
         1. Choose every x weeks
         2. Choose which days of week
      iii. Monthly
         1. Choose every x day of x month
         2. The x day of week of every x month
      iv. Choose what time of day the report will run
         1. NOTE: Report will be queued to run at scheduled time. Exact delivery time is determined by system load and email timing.
      v. Choose for the report to end after a specific end date or no end date.
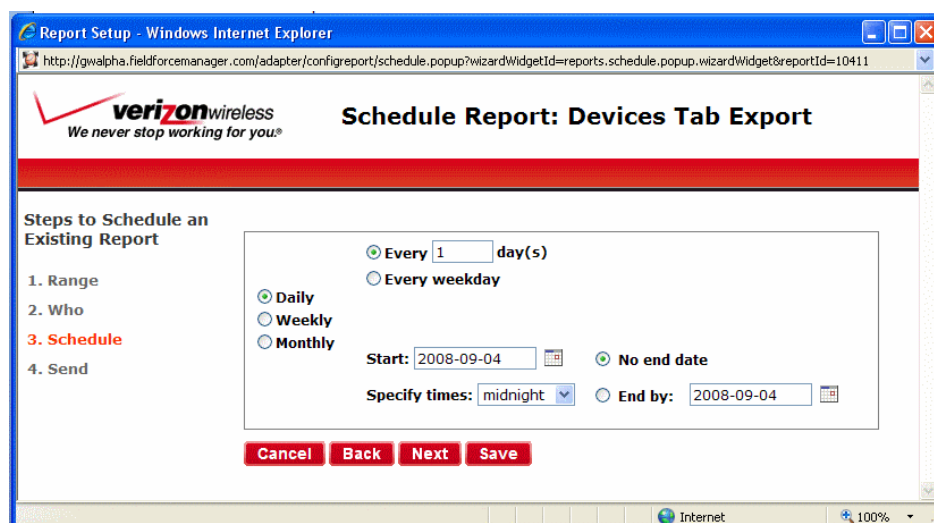
7. Click **Next** to move the **Send Setup** page
   a. The send setup page allows the web user to specify the users who will receive the report, the format the report will be sent in (PDF, excel, txt and email), and whether the report should be oriented horizontally or vertically.

# Export Reports

The export report tab allows the web user to export job, timecard and form data directly to the excel format.



## Job Type Export

The Job type export report provides detailed job information, address, and actions.

## Timecard Export

An export report that allows timecard 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, job, timesheet, 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 form attached to either the start or end shift.

# Administration

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

## Users List

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



## Creating a new user

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

1.  Select the **Users** tab.

2.  Click the **Create User** button, a create user window will appear.

    

3.  Enter the user's first and last name, which group you would like that user to belong to, which Security Group you would like that user to belong to, the time zone, and a username and password (these are all required fields).
    1.  The password for a user must meet the minimum password settings.  These settings can be configured in the Administration-Settings-Company Settings section.  The minimum password length for Field Force Manager is five characters.

## Edit an Existing User

1. Select the **Users** tab.

2. Click on the user you would like to edit. The Options Menu will appear.

3. Click the **Edit User** button. An Edit User window will open.

4. Make the necessary field changes.

5. Click **Save**.



## Delete an Existing User

1. Select the **Users** tab.

2. Click on the user you would like to delete. The Options Menu will appear.

3. Click the **Delete User** button. A confirmation window will appear asking if you are sure you would like to delete the selected user.

4. Select **Ok**.

# Upload Users
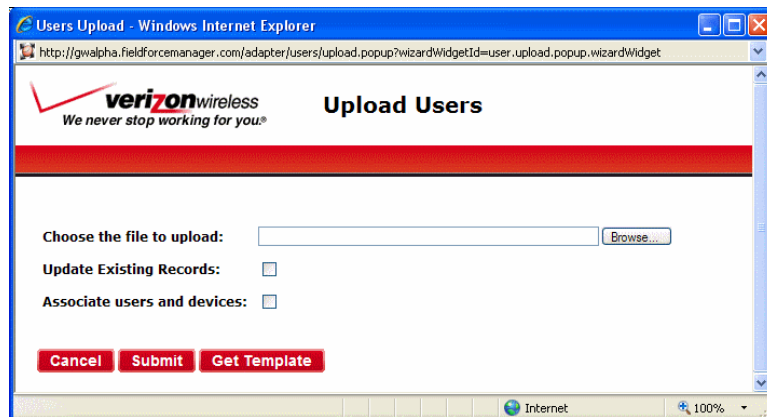
1. Select Upload Users button

   **Upload Users**

2. Select the "Get Template" button to download user upload template
3. Unzip XLS, CSV and txt file to local computer
4. Enter Users into XLS or CSV file, Save the file
5. Select the "Browse" button
   a. Select the file with data to be uploaded
6. Check Update Records box if you want to update records if they're the same
7. Select the "Submit" button.

   User:
   - First Name (Required)
   - Middle Name
   - Last Name (Required)
   - Preferred Name
   - Group (Required, must be valid Group Name)
   - Security Role (Required, must be valid Security Role)
   - Time Zone (Required, must be valid Time Zone)
   - Pin (Required, must be 4 – 10 unique number for the company)
   - Username (Required, must be unique for the company)
   - Password (Required)
   - Street Address
   - Apt_Suite
   - City
   - State
   - Zip
   - Country

# Devices

The "Devices" tab displays a list of all of the devices that are configured within your Web portal account during setup. To add new devices to your system, contact your Verizon Wireless sales representative to purchase additional licenses.

## Editing a device

1. Select the **Devices** tab.

2. Click on the device you would like to edit. The Options Menu will appear.

3. Click the **Edit Device** button, an Edit Device window will open.

4. Make the necessary field changes and then click **Save.**

## Deactivate an existing device

You only need to deactivate and reactivate a device when the phone is lost and you need to put Field Force Manager on another device.  Deactivating a device will log the mobile worker out of the phone and clear all data from the handset.

1. Select the **Devices** tab.

2. Click on the device that you would like to deactivate.

3. Click the **Deactivate Device** button.

4. A confirmation window will appear asking if you are sure you would like to deactivate the selected device. Click **Yes.**

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

# Groups

Groups are used to organize your mobile workers based upon your company divisions, markets, and territories.  Groups will allow a Web Portal user to filter and organize workers and jobs.



**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 portal. 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.
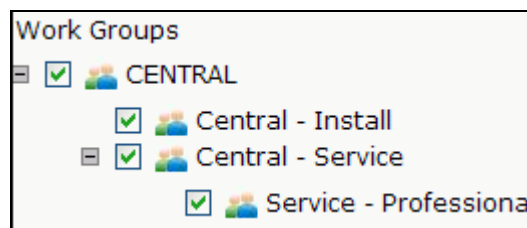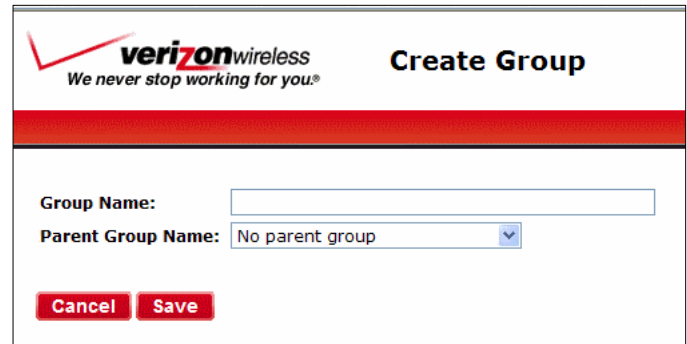
## Create a new group

1. Select the **Groups** Tab.

2. Click the **Create Group** button, a Create Group window will appear.

   

3. Enter the group name.

4. Choose the **Parent Group Name** (choose **No parent group** if none is wanted).

5. Click the **OK** button.


## Edit an Existing Group

1. Select the **Groups** Tab.

2. Click on the group you would like to edit. The Options Menu will appear.

3. Click the **Edit Group** button. An Edit Group window will open.

4. Modify the name and/or parent Group.

5. Click the **OK** button.
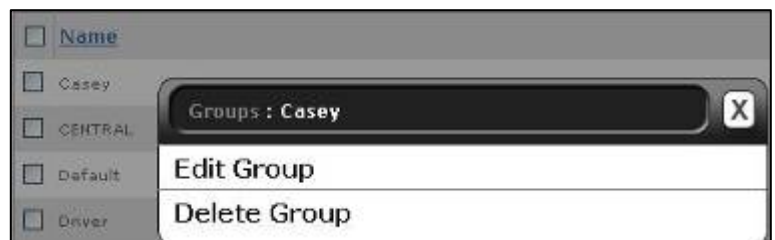

## Delete an existing group

1. Click on the group you would like to delete. The Options Menu will appear.

2. Click the **Delete Groups** button.

3. A confirmation window will appear asking if you are sure you would like to delete the selected group. Select the **OK** button**.**

# 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

1. Select the **Locations Type** tab.

2. Click the **Create Location Type** button, a Create Location Type window will appear.



3. Enter the Location Type name. If this is a "Prohibited" Location check the Prohibited checkbox.

4. Select an image by clicking the left and right arrows.

5. Click **Save** or **New** to create another Location Type.

## Edit an existing Location Type

1. Select the **Location Type** Tab.

2. Click on the Location Type you would like to edit. The Options Menu will appear.

3. Click the **Edit Location Type** button. An Edit Location Type window will open.

4. Modify the information and click **Save**.

## Delete an existing Location Type

1. Click the **Location** Type Tab.

2. Click on the Location Type you would like to delete. The Options Menu will appear.

3. Click the **Delete Location Types** button.  A Reassign Location Type window will open.

4. 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).

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

# Alerts Tab

An alert is an automated message to a user or 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/Logout event (Starting shift to early)
    - Basic and Premium Packages
        - Timecard event( Starting or Ending shift at the wrong location)
        - Ad-hoc Form event (Filling out a form with a specific value)
    - Premium Package
        - Job status event (Notification of completing a job)
        - Job Attribute event(A job having a specific value)
        - Job create event (notice of a new job)
- 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 users activities such as:
            - No communication in over an hour
            - No GPS in over an hour
            - Not logging in or out of the application on time
            - Not starting or ending their timecard shift on time
            - Having a shift that is too long(no breaks)
            - Working more than 40 hours in the last 7 days.
    - Job Monitoring Alerts (Field Force Manager Premium Only)
        - Managers can now monitor via pro-active alerts a job status, schedule and actual start and end.  The alerts can notify a manager of:
            - Jobs not started by their scheduled Start time
            - Jobs not completed by their scheduled End time

## Viewing a Fired Alert

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

2. Click on the Alert you wish to view in the Fired Alerts list. The Options Menu will appear.



3. Select the **View Alert** 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 Fired Alert**

1. Select the **Alerts** Tab.

2. Click the alert you would like to delete. The Options Menu will appear.

3. Select the **Delete Alert** button.

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

## Alert Configuration List

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

**Creating Alerts**

1. Select the "Alert" tab (this tab is only active for an administrator).

2. Click on the "Configuration List Button."

3. Select the "Create Alert" button and a new window will appear.



4. Enter the name you want for the alert; for example, "Speeding."

5. Give a description; for example, "Exceeding the speed limit of 65 mph."

6. Check the "Active" box. If the box is blank, the alert will not be activated.

7. Select the Type of Alert you want to create

8. Click the **Next** button, A New Alert window will appear.



9. Select the **New Rule** button.

10. Select a data type to alert on. i.e. GPS.

11. 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.
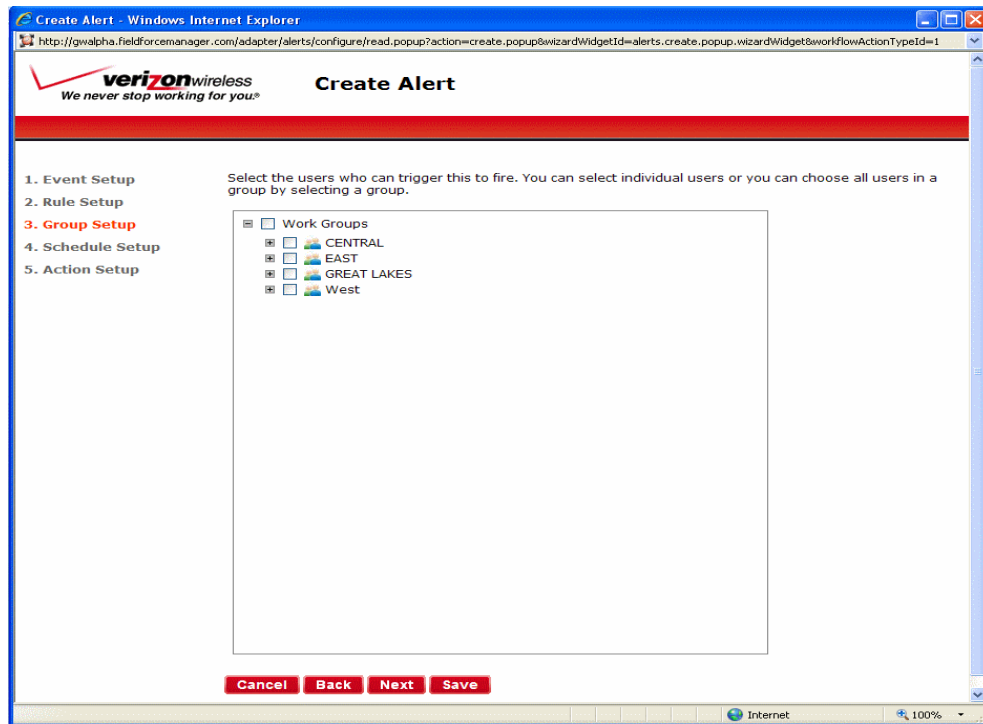


12. Select a value, i.e. Greater then, select **Apply** Changes (repeat the steps to add more than one rule to an alert by selecting the new rule button again).

13. Select the **Next** button once you have added all the rules.  A new Groups window will appear.

14. Select the group or individuals that this alert will apply to.

15. Select **Next**, a new schedule window will appear.

16. 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.

17. Select **Next**, an Action Setup Window will appear.

18. 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].

19. 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**

1. Select the **Alerts** Tab.

2. Click on the **Configuration List** button.



3. Select the Alert you would like to edit. The Options Menu will appear.

4. 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.

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

**Deleting Alerts**
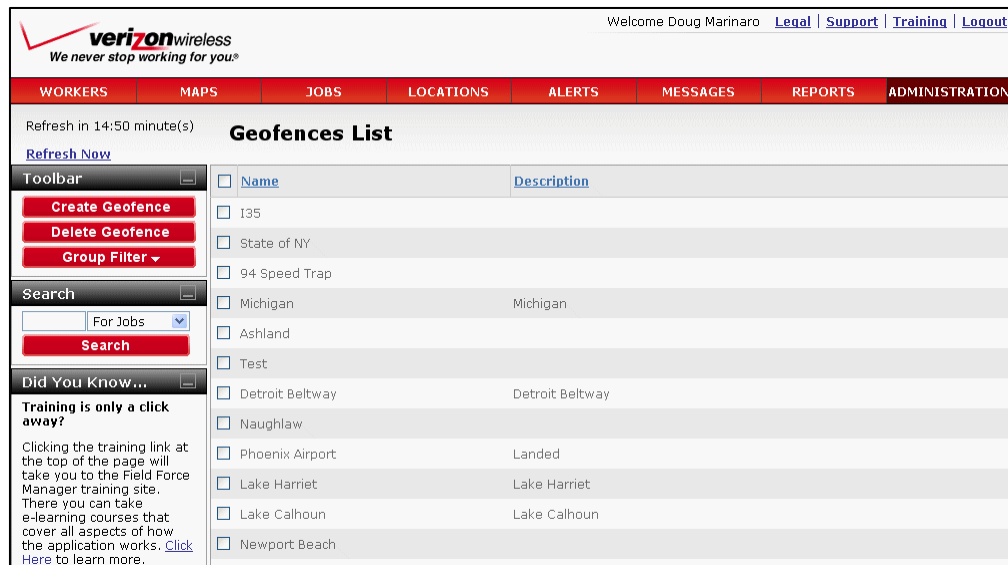
1. Select the **Alerts** Tab.

2. Click on the **Configuration List** button.

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

4. Click the **Delete Alert Configuration** button.

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

# Geofences

The Web Portal 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 Portal 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 to alert upon the geofence.

## Creating a Geofence

1. Click on the **Geofence** tab under Administration in the Web Portal.



2. Select the **Create Geofence** button.



3. The geofence configuration page will be displayed. Enter a Geofence Name, Description, and Group.

4. 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.

5. 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.

6. 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, Field Force Manager will automatically connect them. If you make a mistake or would like to alter the polygon, you can move a point by clicking on the one you want to move, and then clicking the map in area you want to move it.

7. 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.

8. When done, click the **Save** button.



## Editing a Geofence

1. Click on the **Geofence** tab under Administration in the Web Portal.

2. Select the Geofence you would like to edit. The Options Menu will appear.

3. Click the **Edit Geofence** button.



4. Modify the Geofence as desired.

5. Click **Save**.

## Deleting a Geo-fence

1. Click on the Geofence tab under Administration in the Web Portal.

2. Select the Geofence you would like to delete. The Options Menu will appear.

3. Click the **Delete Geofence** button.

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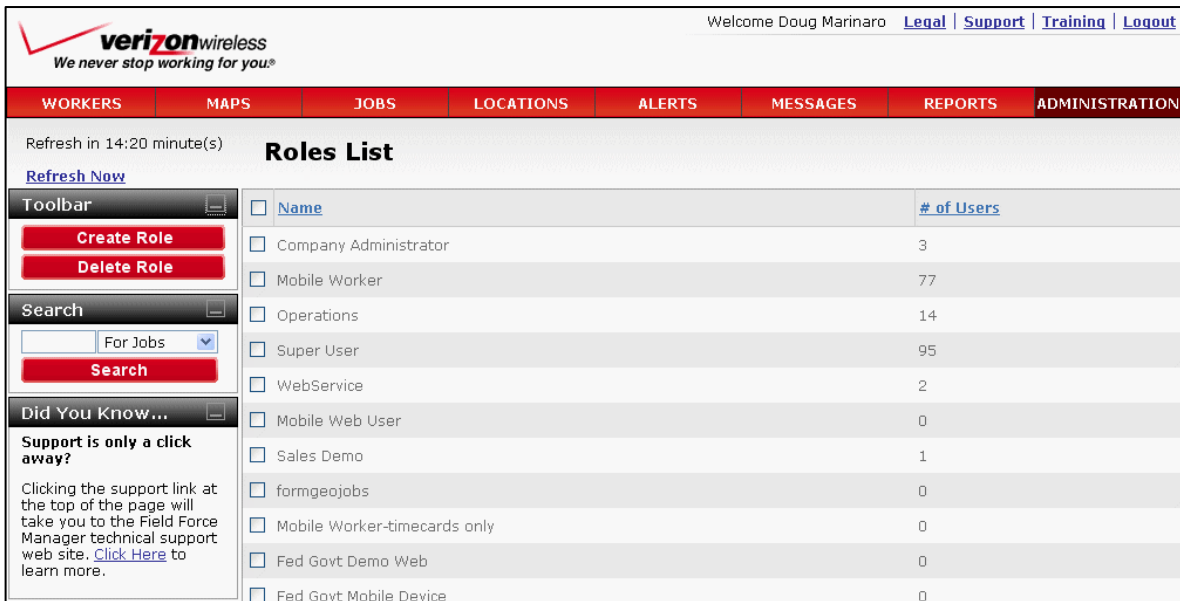


Web users can choose to display their Geofences on maps by choosing geofences from the display filter. The name of the geofence can be turned on or off using the Label filter that is found within the display filter.
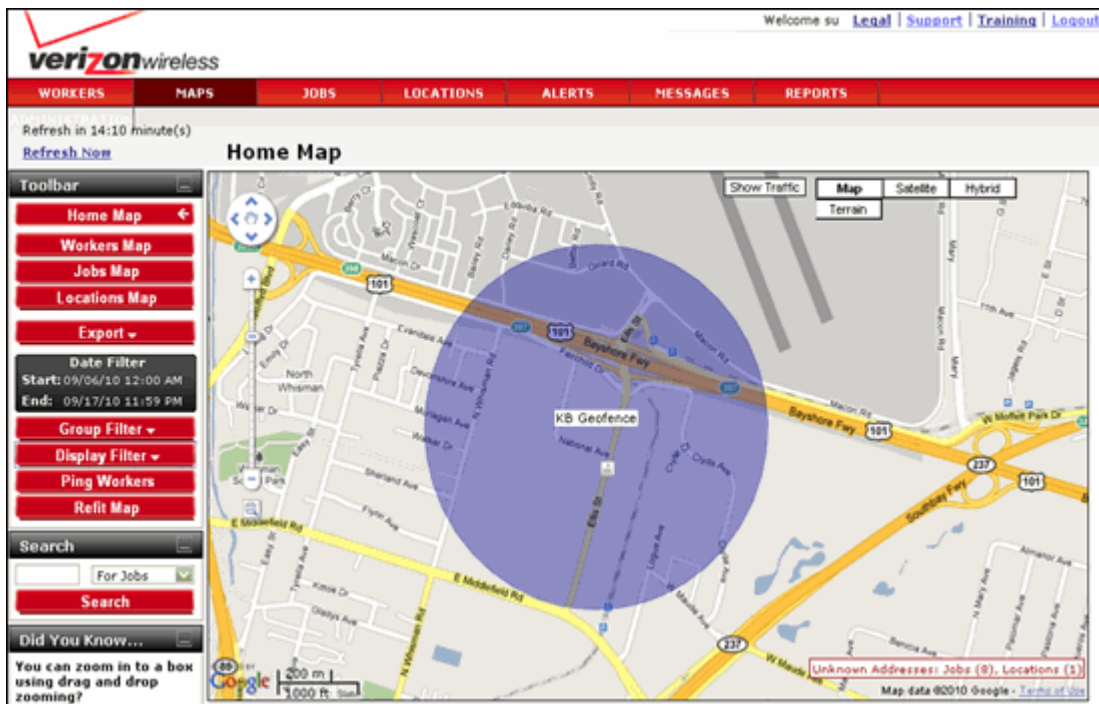
## Security Roles
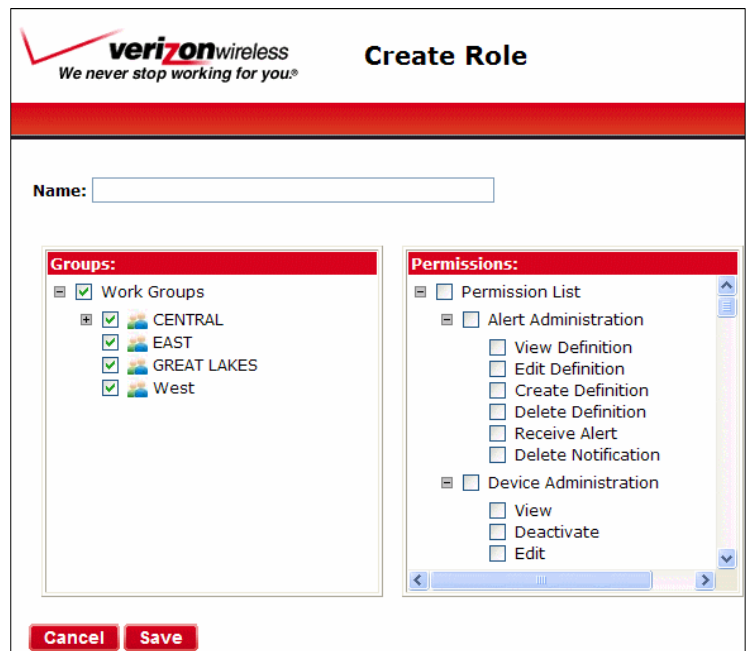
Administrative users of the Web portal now have the ability to create, edit, and delete various security roles for their company. Each role can be configured to access certain functionality and work groups. Administrators for companies with multiple divisions can restrict access for individual users 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 portal 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 Basic and Premium packages.



### Creating a role

1. Select the **Roles** Tab.

2. Select the **Create Role** button; a create window will open.



3. Give the role a unique name.

4. Select the group that it will be associated with.

5. Select the permissions you want associated with that role.

6. Click **Save** when completed.

## Editing a role



1. Select the **Roles** Tab.

2. Select the role you would like to edit. The Options Menu will appear.

3. 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.)

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

5. Click **Save** when completed.

## Deleting a role

1. Select the **Roles** tab.

2. Select the role you would like to delete. The Options Menu will appear.

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

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

## Copying a role

1. Select the **Roles** tab.

2. Select the role you would like to copy. The Options Menu will appear.

3. Click the **Copy Role** button. A Copy Role window will open.

4. Give the copied role a unique name.

5. Make the desired changes to the group or permissions.

6. Click **Save** when completed.

## Job Type Configuration

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 job and the forms that a worker should complete during the job process. (This functionality is only available in the Field Force Manager Premium package)

### Job Type Tab

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 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.

| Field Name | Description |
|---|---|
| start | Schedule Start Date time |
| end | Scheduled End Date time |
| actual start | Actual Start date time |
| actual End | Actual End date time |
| statusDescription | The description of the job status(i.e. In Transit) |
| categoryCode | The description of the job's category code |
| customerTypeCode | The description of the job's customer type |
| Latitude | The latitude of the job's address |
| getAttribute('x') | Displays the value of job detail x |

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

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 portal. 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 portal 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 portal 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.



### 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 portal. 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 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 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.

# Forms

The "Forms" tab contains a variety of forms that allow workers to collect data in the field. Each form can have multiple fields for different types of data collection, and be made available to the specific Groups that need them. Forms are available in the Field Force Manager Basic and Premium packages.  Forms can be configured in three formats:

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



## Creating a Form

1. Select the **Forms** tab under the Administration

2. Select the **Create Form** button

3. Enter a Name and Display name for the Form

4. Select **Next** to move to the **Fields** screen

5. Select the **New Field** button



   a. Enter a Field Name
   b. Enter the Label Field
   c. Choose the field type
        i. Text (allows text or number entry)
        ii. Number(only allows numbers)
        iii. Select List(Values must be separated by comma)
        iv. Checkbox
        v. Money
        vi. Picture Capture
        vii. Odometer
        viii. Signature

   d. Choose the maximum field length.
   e. Optional:
        i. Choose if the field is required or not
        ii. Choose default value for the field

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      f.   Press the **Apply** button to add the field to the form.

6.  Add more fields as necessary

7.  Select **Next** to move to the **Deploy** screen



8.  To activate the form
    a.  Check the **Active Form** box
    b.  Check the **Available on Forms Menu** box to make the form available from the forms menu on the phone.
    c.  To attach the form up to a timecard action, check this box next to the action on which you would like to have the form appear.
    d.  Check the appropriate **Groups** to make the Form available to them**.**

9.  Once complete, press the **Save** button.
    a.  The form will be sent to the phone once the phone user receives a new job/message/location or the user forces the phone to communicate (*#) or logs out and back in.

## Editing a form

1. Select the **Forms** Tab.

2. Select the form you would like to edit. The Options Menu will appear.

3. Click the **Edit Form** button. An edit form window will open.



4. Make any necessary changes to the form.

5. Click **Save** when completed

## Deleting a form

1. Select the **Forms** Tab.

2. Select the form you would like to delete.

3. Press the **Delete Form** button.

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

# Workflow

(Field Force Manager Premium Only)

The Field Force Manager application can take action on mobile worker events and monitors.  The application can automatically perform actions for users upon specified criteria.  The system can take the following actions upon specific system events.

- Create jobs
    - Examples
        - Create Job Form
        - Create Job upon Job Completion
        - Create Job upon Stop at Location
- Perform job actions(Start, Complete, etc)
    - Examples
        - Start Job upon stopping at job location
        - Start Job upon creation
- Perform timecard actions
    - Examples
        - Start Shift upon arriving at customer location
        - End Shift upon leaving customer location
- Create or Update Locations
    - Examples
        - Create Location Form
        - Create Location at Unknown Stop

**To give a user access to Workflow rules**
The web user must be configured to have access to the Workflow rules.  By default only the Company Administrator role has access to Workflow rules.

1. Go to Administration -> Users tab
2. Edit the user you would like to give Workflow access to
3. Choose Company Administrator or a custom role with the Workflow permission added.
4. Save the user
5. Log into the web portal as the user with workflow permissions

**To Create a Workflow**
Creating a workflow is similar to creating an alert; in fact the two functions are based upon the same technology.  The core difference is when configuring a workflow the last step is choosing what type of action to take versus an alert you're choosing what the content of the message you would like to send.

1. Go to the Administration -> Workflow tab
2. Choose the Create button
3. Name the Workflow
4. Choose the type of event you would like the workflow to react to.
5. Choose the Rules that will define when the Workflow is triggered.
6. Choose the Groups of workers the workflow rules should be performed against
7. Choose the Schedule, the days and times when a workflow rule should be enabled.
8. Choose the Action you would like to take upon workflow being triggered.  To perform the action, specific pieces of information are required to be entered

    **a.** Create Job
-     **i.** Job Type Name
  -     **1.** Name of the Job Type that will be created
-     **ii.** Job Reference Number
  -     **1.** A reference number will be generated if this is not provided

    b. Submit Job Action
-     i. Action Name: The name of the action to be performed
-     ii. Worker Username: The username of the user who performed the triggering action.
-     iii. Coordinate: The coordinate of the triggering action can be configured to be the coordinate of the action being performed.

    **c.** Submit User Action
-     **i.** Action Name: The name of the action to be performed
  -     **1.** Start Shift, Start Break, End Break, End Shift are the valid options
-     **ii.** Username of user to perform the action
  -     **1.** Most often configured as the username who performed the triggering event
-     iii. Coordinate: The coordinate of the triggering action can be configured to be the coordinate of the action being performed.

    d. Create or Update Location
-     i. Location Reference Number: The reference number of the location to be created or updated.
-     ii. Location Name: The name of the location to be created
-     iii. Coordinate: The coordinate of the triggering action can be configured to be the coordinate of the location being performed.

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

# Settings

## Hours of Operation

A Web Portal administrator can configure the hours of operation for an entire company, a group, or a specific user.  By default the mobile phone will collect GPS information 24/7 while the Field Force Manager application is running.  If a worker remains logged into their mobile phone after the set Hours of Operation, the mobile phone will stop collecting GPS and communicating until the next day.  If a user logs in, performs a timecard or job action, the mobile phone will resume GPS collection and communication until the next days "On" Hours of Operation or a set number of hours.  Hours of operation are used to control GPS collection and Auto Application Start Up.



### Allow / Ask / Deny Settings
These settings will only control privacy settings on handset devices released after May 2009.  Older handsets these settings must be set on the device.

## Company Settings

**Auto Launch to Background**
This preference if enabled will cause the application to automatically suspend after the application is started.  The application will remain in the foreground for 3 seconds prior to moving to the background.

**Auto Shutdown after Hours of Operation**
This preference if enabled will cause the application to automatically exit at the end of a users hours of operation.   The application will end a shift for a user if they are currently on duty.  This preference is not suggested if the user uses the application for Forms, Timesheets or Jobs.

**Auto Application Startup**
This preference if enabled will cause the server to send SMS message to start the application during a users hours of operation.   The SMS message will be sent if the mobile phone has not communicated with the server in an hour and five minutes.

**First Time Setup**
This preference controls whether or not the next user to log into a company will be prompted to fill out the first time setup wizard.  If the preference is set to true, the next web user to log into the web application will be presented with the setup wizard.  This preference is set to false after a user completes the setup wizard.

**Map Style**
This preference allows web users to choose which of the many Map Styles to display in the web portal.

**Options Menu Code**
This preference allows a company to set the access code that prevents access to the * 9 menu on the mobile phone.   The default code is 4321.

**Suppress Device Notifications**
The preference if enabled will suppress all modal dialogs to the mobile worker.  This will prevent the user from being notified of new or updated jobs, locations and messages.


# GPS Collect and Send Rate Preferences

Users can now control the GPS collect and send rates via new company preferences in company settings.
**GPS polling interval (seconds)**:  This preference will allow GPS collect rates to be set to down to 60 seconds (from the default of 120).

**Minimum GPS points per datagram:**  This preference will allow the upload rate to be set down to 1 GPS pt (from the default number of pts to be collected before they're uploaded of 14 or 28).

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

## Auto Application Start Up

Field Force Manager has the ability to remotely start the mobile application.   Auto Application Start Up is designed to automatically keep the Field Force Manager application running during your companies defined hours of operation.  The Field Force Manager application can also be started on demand using the Remote Start button on a Worker Map or the User Tab.  Field Force Manager customers will not be charged for the Auto Application Start Up messages being sent to the mobile phone.

To enable Auto Application Start Up the company setting, "Auto Application Start Up" must be changed to True.  The default setting for this preference is False.  Next the Hours of Operation must be set.  By setting up the Hours of Operation, the application will know when to automatically send a message to the mobile phone to turn on for the day.    The server will also monitor the application throughout the day to ensure it remains on.  The server will restart any mobile phone that has not communicated with the server in an hour and five minutes.   If they have not, the application will send a message to restart the application and log the user back in.  The mobile phone must be turned on for the application to be restarted.

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

**NOTE:**  Auto application startup uses SMS message to start up the application. If the account has SMS messages blocked SMS start will not work.   Manually pressing the SMS remote start button will send one SMS message to the device.  The web portal will not send another start message until the application communicates with the server or 24 hours passes.

# 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 portal.

## Training

To get training on Field Force Manager, click the training link in the upper right hand corner of the web portal.
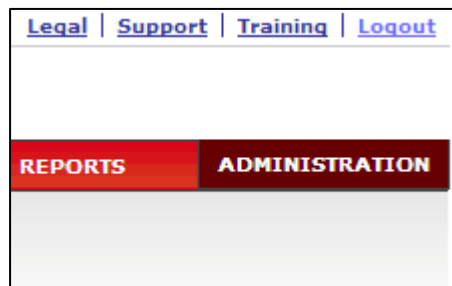


## Did You Know...

In the bottom left-hand side of the Web Portal you will find the Did You Know box. In this area are helpful hints and shortcuts to make your Field Force Manager experience even more enjoyable. To learn more about a specific suggestion given in the box, follow the link found therein.

# Glossary

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

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

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

**Filter**
A means of controlling what information is displayed in the Web Portal content frame.  Specifying a date range in the date/time filter, for instance, instructs Web Portal to display only the information gathered during that timeframe.  You can also filter out Group, Location, Worker and Activity information.

**Fleet**
A company's collective group of mobile workers.

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

**Geo-code**
These are the map coordinates that Web Portal generates from an address.  Map coordinates can be overridden.

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

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

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

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

Field Force Manager has both Basic and Premium job functionalities:

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

**Premium**:

Web portal users can:
- Use advanced job dispatch.
- Link jobs to known locations in the system, reducing data entry and errors.
- View all jobs or a single job on all maps.

Mobile users can:
- Read details of the job.
- Call ahead to the job contact.
- Obtain audible and map-enabled driving directions to the job.
- Update the job status to "Accept," "Reject," "In Transit," "Start," "On Hold," or "Complete."
- Fill out and send a "Job Completion Form." Once a job is complete, the history can be viewed from "Jobs List" or via the location job history.

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

**Location Type**
Categories of locations set up by company administrators to distinguish certain landmarks. Typical location types might include Company, Customer, General, Prohibited and Vendor.

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

**Messages Tab**
A tab on the Operations site of Web Portal where dispatchers can send electronic messages to their workers in the field.

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

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

**Prohibited**
A location that has been designated as a forbidden location type for a worker to stop at.

**Report Tab**
On the Reports tab, you have the choice of viewing and exporting several different reports.  These reports list information regarding hours worked, location stop times, timesheet actions, travel times, etc.  These reports can be adjusted to display information over any timeframe you designate in your date/time filter.

**Settings Tab**
Located on the Administration site, this is where company administrators can set hours of operation and overtime/double overtime rules.

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

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

**Worker**
Any employees using the Field Force Manager software on their phones out in the field.