OfficeTrack Admin and Web User Guide

Contents

1 Preface

1.1 Abstract

This document includes instructions for getting started using **OfficeTrack.**

1.2 Purpose of This Document

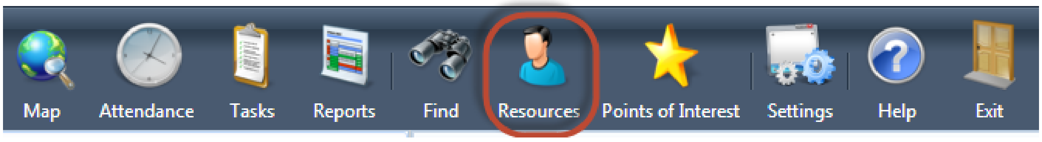
The purpose of this document is to guide users how to get started with using **OfficeTrack.**

2 Initial Setup

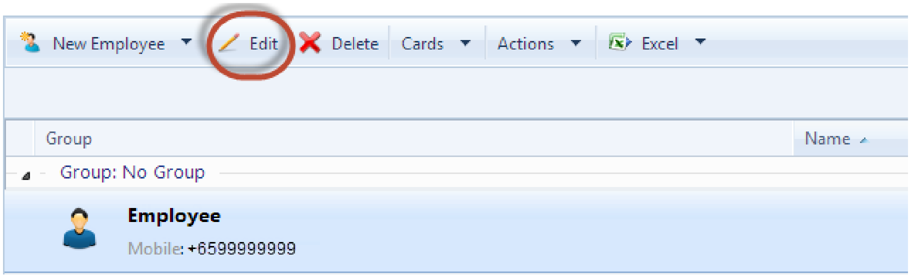
2.1 Editing Resource Particulars and Permissions

After you have setup/entered your employee's mobile numbers from Subscriber Management, you can now edit your employee's particulars and permissions.

1. From the main menu select **Resources**.

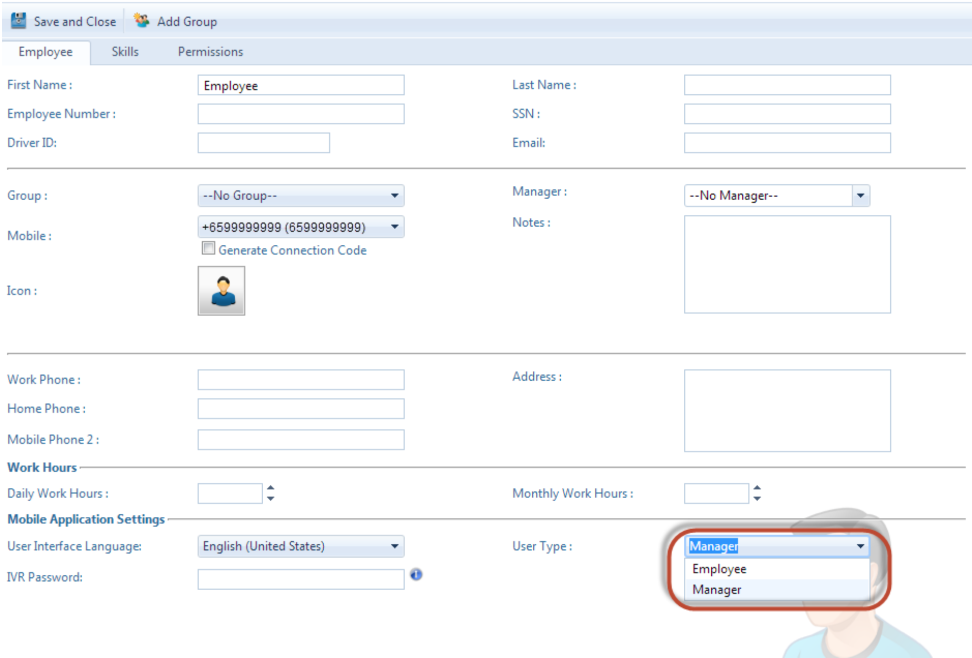


2. Select the Employee and click Edit.



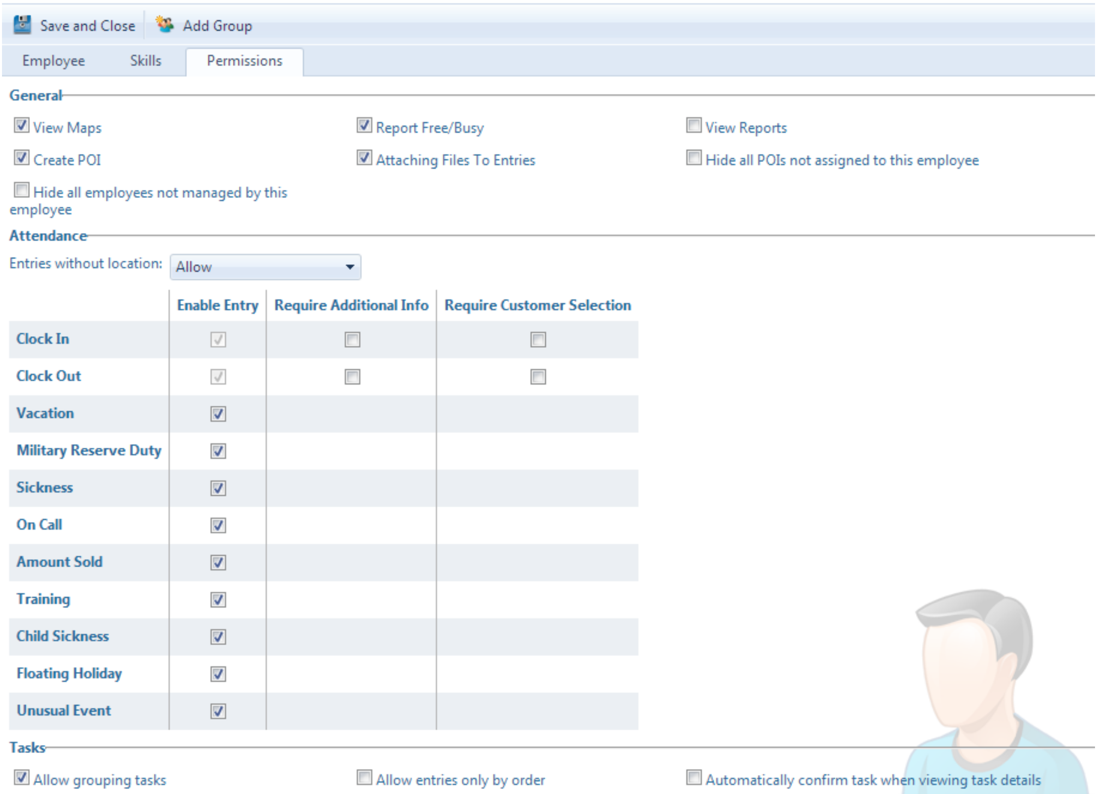
The Employee Properties popup window will appear.

3. From the **Employee** tab:
   - Edit the particulars of your employee.
   - You can set the User Type to either Employee or Manager.
     - **Manager** has the ability to know the locations of the employees through his mobile client and can also send attendance on behalf of the employees.



4. From the **Permissions** tab, you make the required settings for your employee's access on his mobile client.

   Note: There are some boxes that cannot be ticked as this depends on the Offer you purchased from myBusiness.

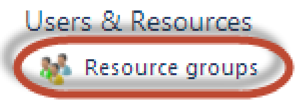


5. Click **Save and Close**.

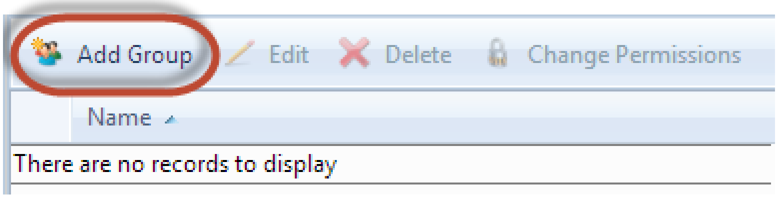
2.2 Employee Groups

To improve your management and staff control, OfficeTrack allows you to define groups and associate resources to various groups.

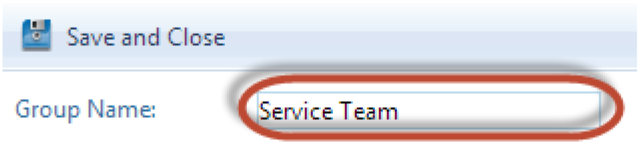
1. From the main menu, select **Settings > Resource** groups.



2. Click Add Group from the toolbar.

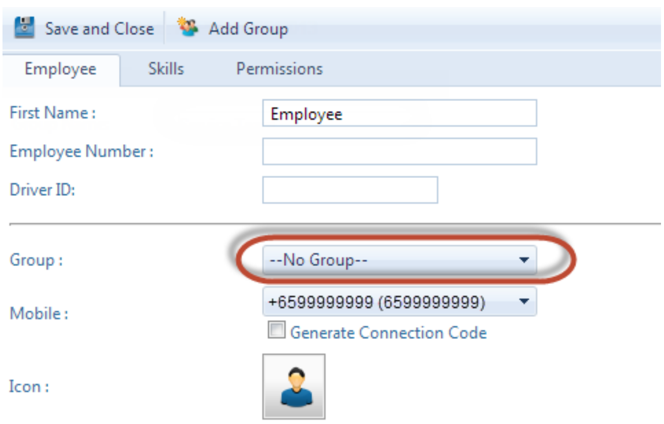


3. Enter your desired Group Name.



4. Click Save and Close.
5. Now you can assign your Resources to the Group you have just created.

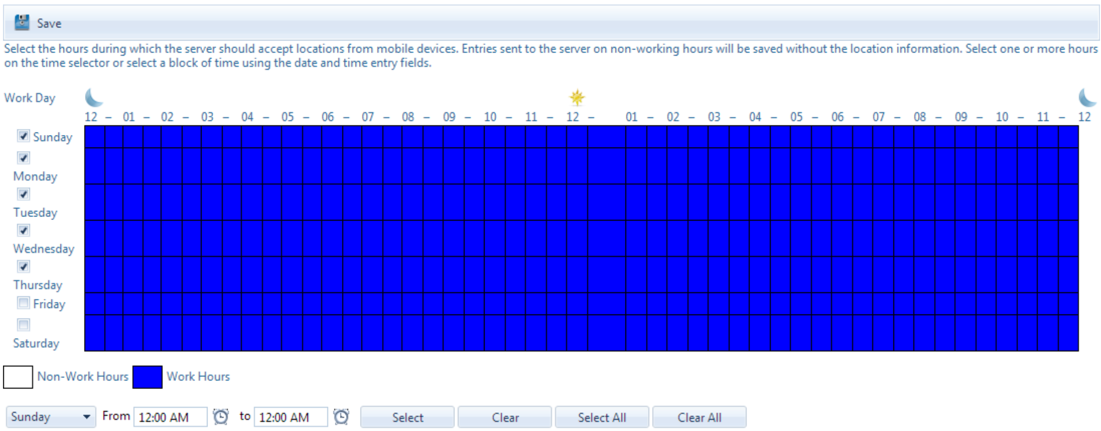
   *See Editing Resources Particulars Section:



2.3 Defining Work Hours

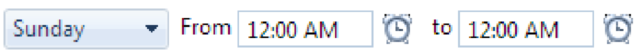
You can define work hours for your company. The system saves location information only regarding reports received at the system within the defined work hours.

1. From the main menu, select **Settings > Work Hours**.
2. Set up the required work hours in one of the following ways:
   a. Visually: Drag the mouse across the table to mark the required work hours.



> Note: You can click **Clear All** to clear the table and start again.

   b. From the lower toolbar:
      - From the days dropdown menu select a day.

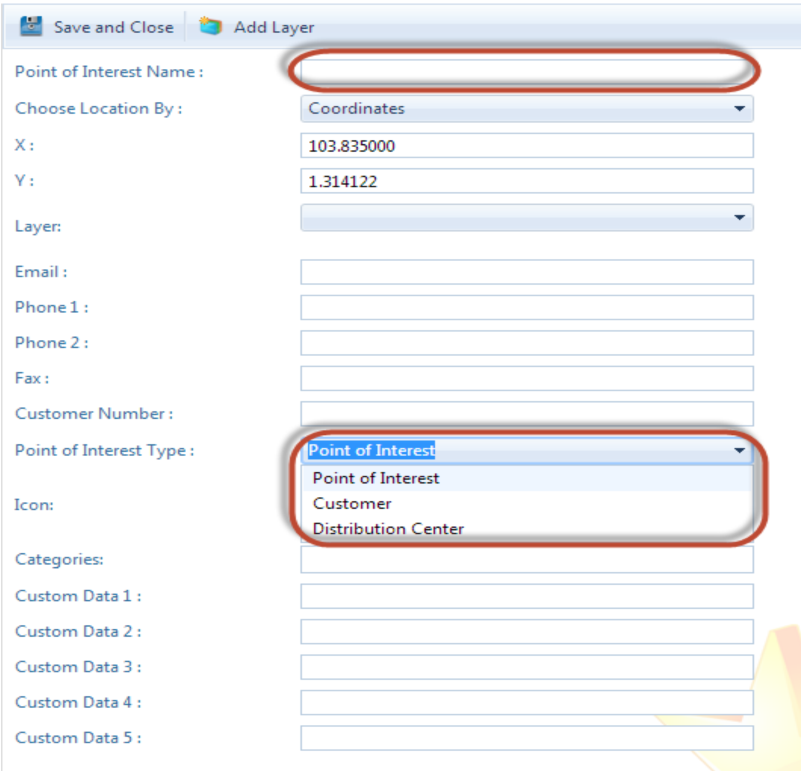


      - Select the start and end hours.
      - Click **Select**.
      - Click **Save**.

2.4 Setting up Points of Interest

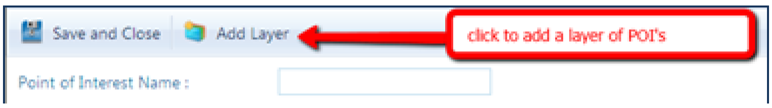
You can set up points of interest (POI) to indicate the location of a customer, provider, employee's residence, project site and so on. The POI is displayed on the map and you can set up the system to send a notification when an employee gets close to or away from the POI, and more.

1. From the map window, right click at the location you want to set up as a point of interest.
2. Select **New > Point of Interest**.
3. From **Point of Interest Properties**:
4. Enter the **Point of Interest** name.
5. Select the Point of Interest Type.

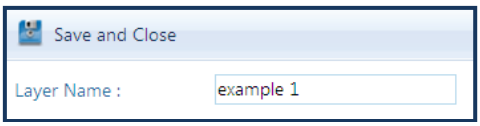


6. Click Save and Close.

   Note: You can group your POIs by creating/adding a **Layer.**

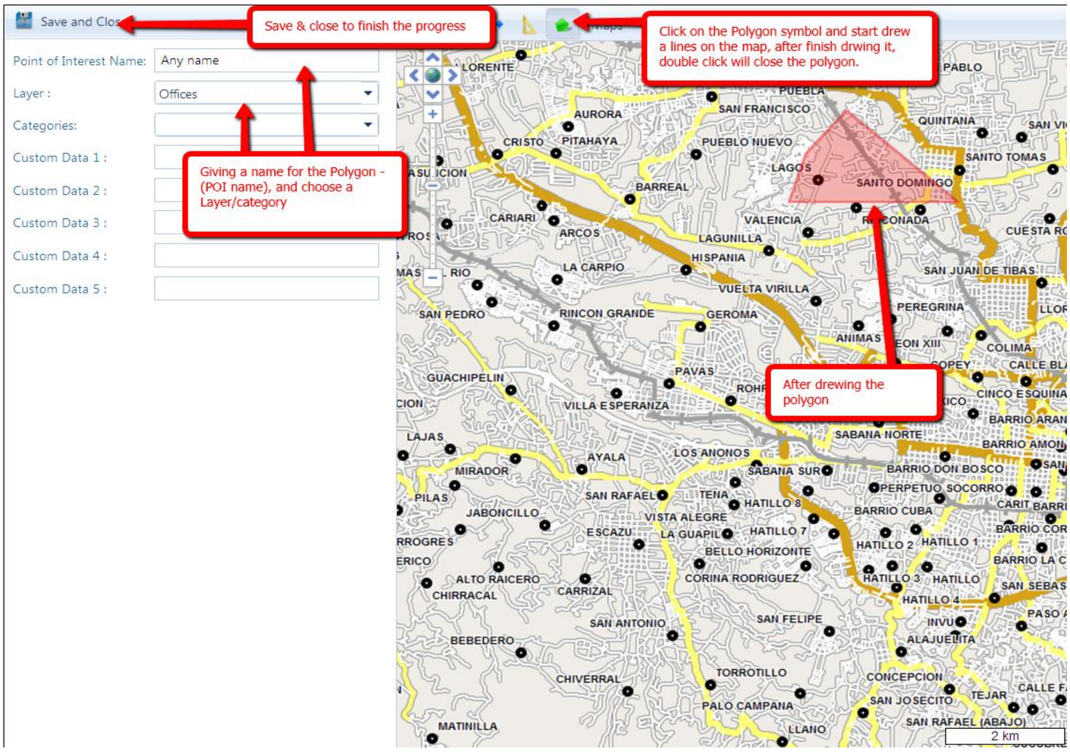


It will open a popup window you can enter your Layer Name.



2.5 Setting up Polygons

1. From the map window, right click at the location you want, click New, Polygon.
2. It will open a popup window. Click on the green icon on the toolbar to draw a Polygon on the map.

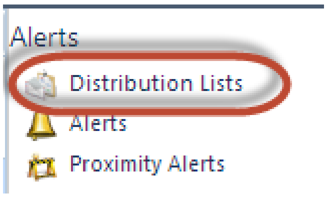


3. Enter the name of this Point of Interest.
4. Select a layer where you want this POI to be grouped.
5. Click **Save and Close**.

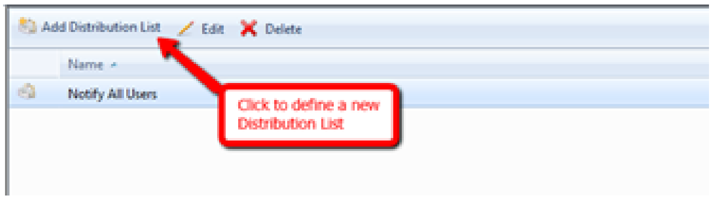
2.6 Defining Distribution Lists

Add in your contact details and set them as your Alerts Distribution List.

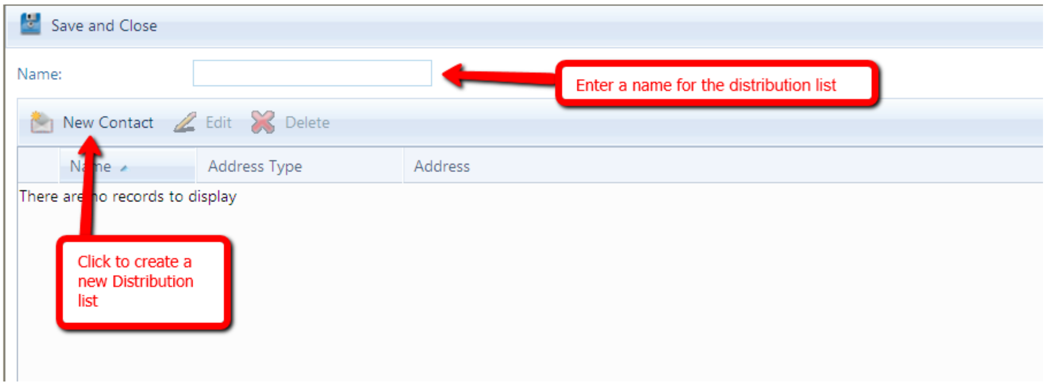
1. From Settings, Select Distribution List.



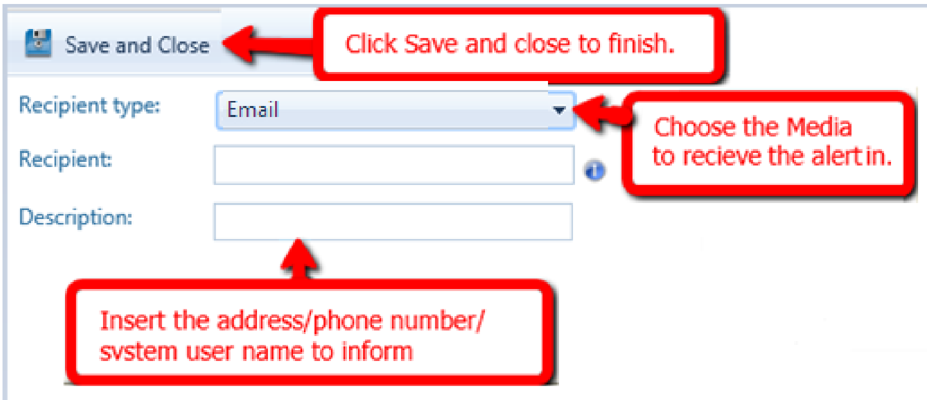
2. Click Add Distribution List.



3. A new window will open which allows you to enter the name of your Distribution List.



4. Click on New Contact. This will open a popup window where you can select how you want to receive the alerts and the recipient details.

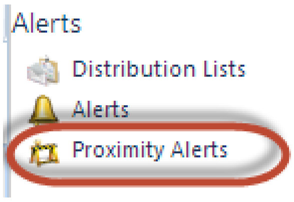


5. Click Save and Close.

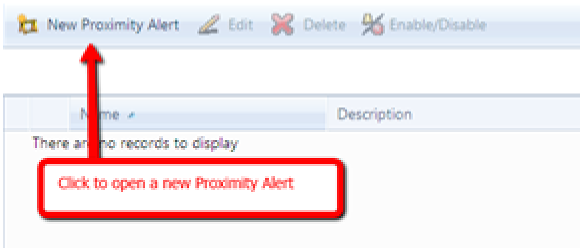
2.7 Defining Proximity Alerts

Automatically receive a notification when a resource enters or leaves the area of an existing Point of Interest or Polygon.

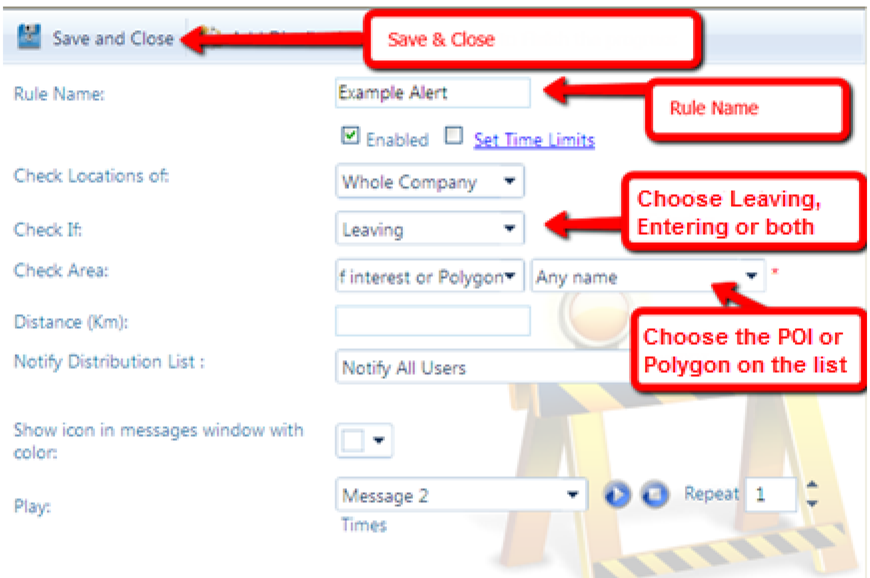
1. From Settings, Select Proximity Alerts.



2. Click New Proximity Alert on the toolbar.

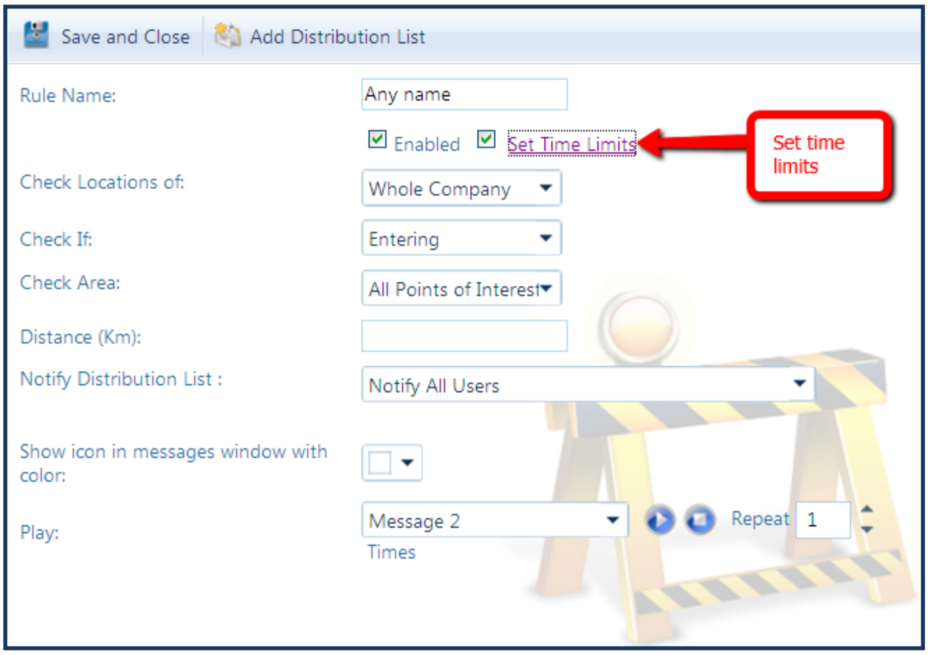


3. Fill in the details of the Proximity Alert you want to define.

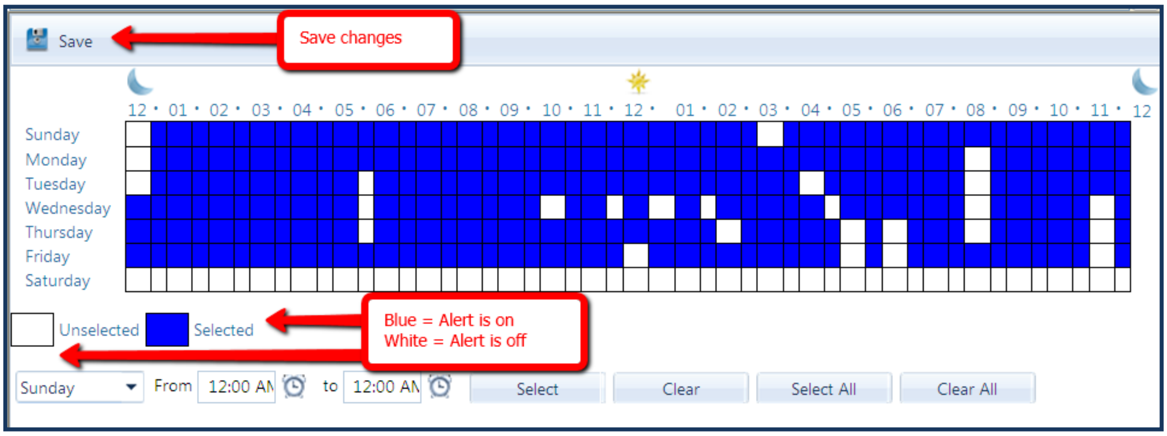


4. Select the Distribution List you want to notify.
5. Click Save and Close.

You can also define time limits in a proximity alert to limit the time the alert will be checked and activated:



Clicking on "Set time limits" Will open a new window with the option to define the time limits:



To edit a proximity alert, click on 

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To delete a proximity alert, click on 

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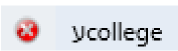
You can enable or disable the activation of a proximity alert by clicking on 

.

This will change the proximity alert's icon in the list :



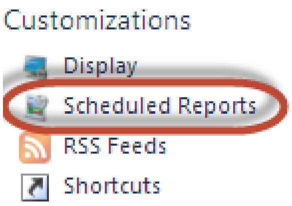
- Alert in disabled.

- Alert is enabled.

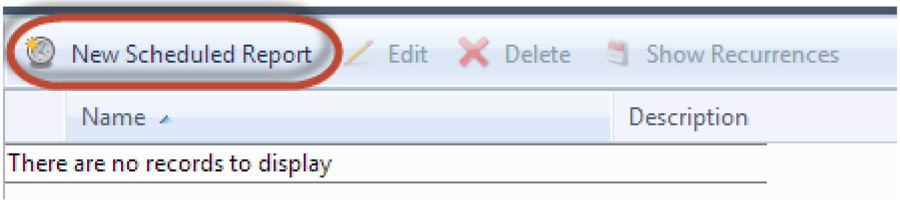
2.8 Scheduled Reports

You can set your defined reports and

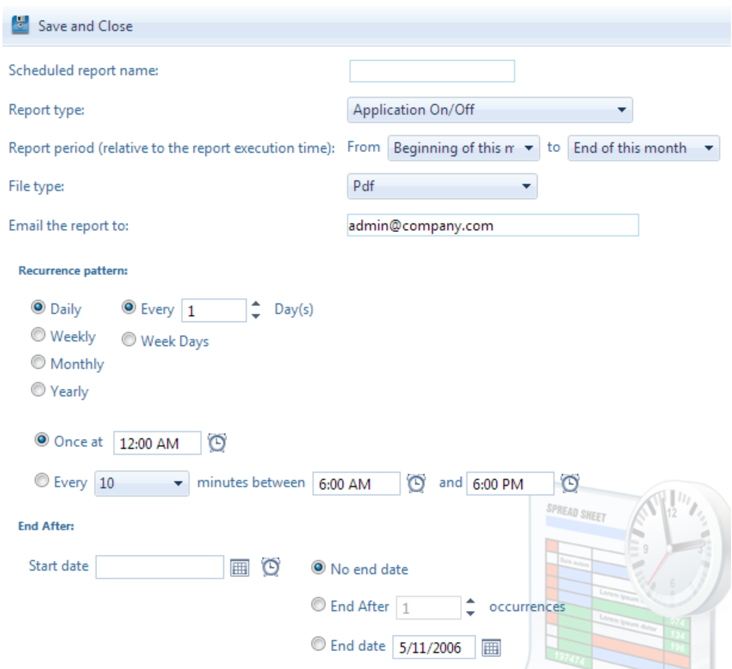
1. From your main menu, click Settings > Scheduled Reports.



2. Click New Scheduled Report from the toolbar.



3. Enter your preferred Scheduled report name, select your Report type, period, file type and recurrence pattern of your desired report.

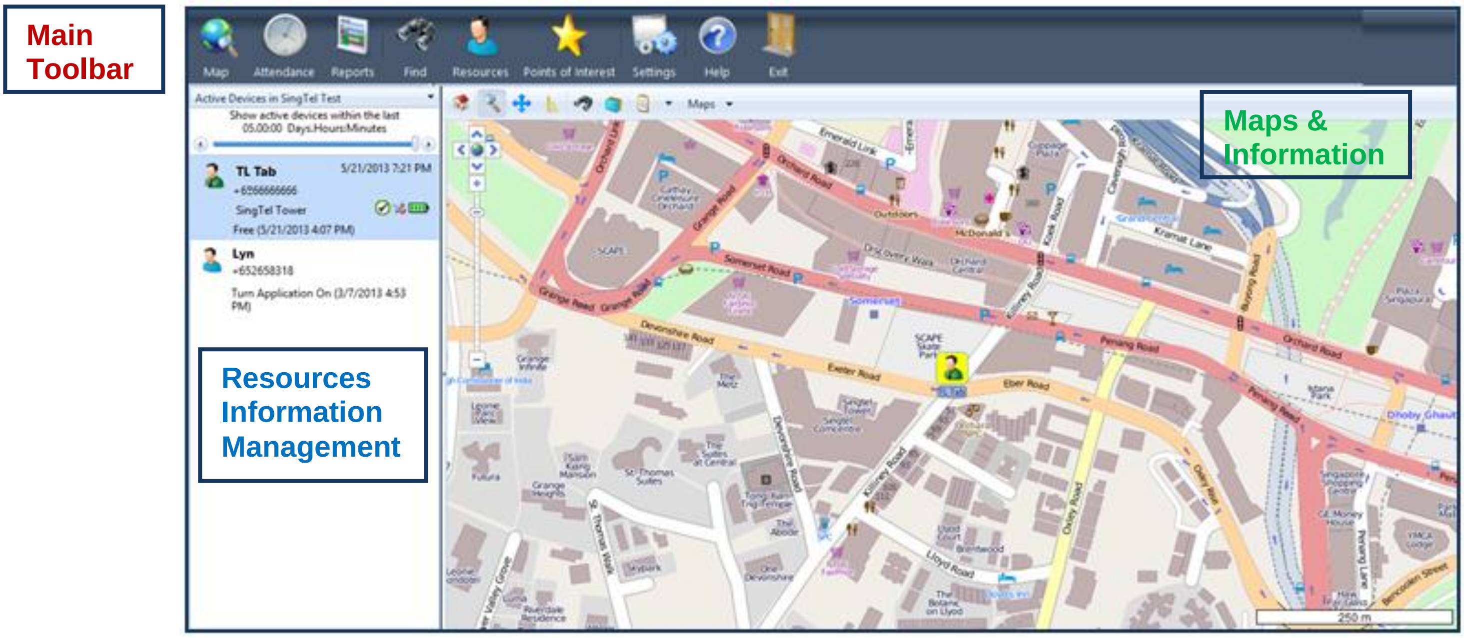


4. Enter the recipient's email address.
5. Click Save and Close.

3 Map

The main screen allows you to do all the transactions in the system.

You can return to the main screen (map) by clicking on the map icon at any time.



There are three major parts to the website:

Main Toolbar – Contains direct link to all sub modules

Resources List – Presents current location status of resources in the system. Supports showing basic data on the resource and displaying the last location infomrtaion.

Map & Information Display – Includes the map and a small toolbar that enables performing actions on the maps like: change scale, pan, zoom, address search, measuring distance etc.

3.1 Map Toolbar

The map toolbar appears on the upper part of the map and is used to allow the fluent work on the map.

The toolbar enables the following options:

Change Scale to Default – Allows the user to return to the default scale of the map. Also have the option to change the default scale by zooming to the wanted scale and clicking on the ALT key and the House icon in the map toolbar.

Zoom In – When clicking on this button and then on the map, there is the option of zooming in into the area you clicked on.

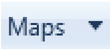
Pan - when clicking on this button and then on the map you will be able to move the map on the screen.

Measure Distance – when clicking on this button you will be able to measure the distance. In order to measure the distance, you need to click on one starting and on one end point. You can measure the distance between a couples of point. You can see the distance on the left lower side of the map.

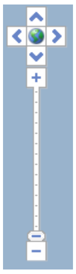
Search Address – when clicking on this button you will see in the left side of the map an option to search an address by a point of interest location or a resource's location.

Show Layers – when clicking on this button you will see in the left side of the map an option to choose which layer's points of interest to display on the map by checking V in the wanted layers.

Show Task Information - Allows you to display the task's location as icons on the map by filtering the date and employee or the task route.



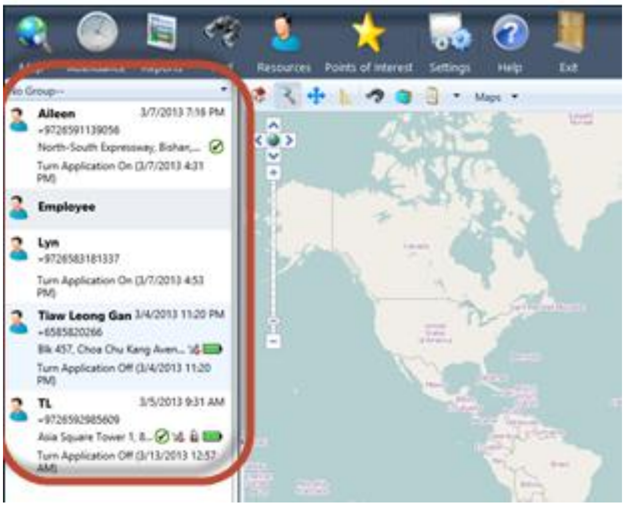
Maps - Will allow you to change the map type that you see – only available on specific maps.



Map Scale Toolbar:
The arrows allow moving the map.
The + and – allow to change the map scale and the zoom level.

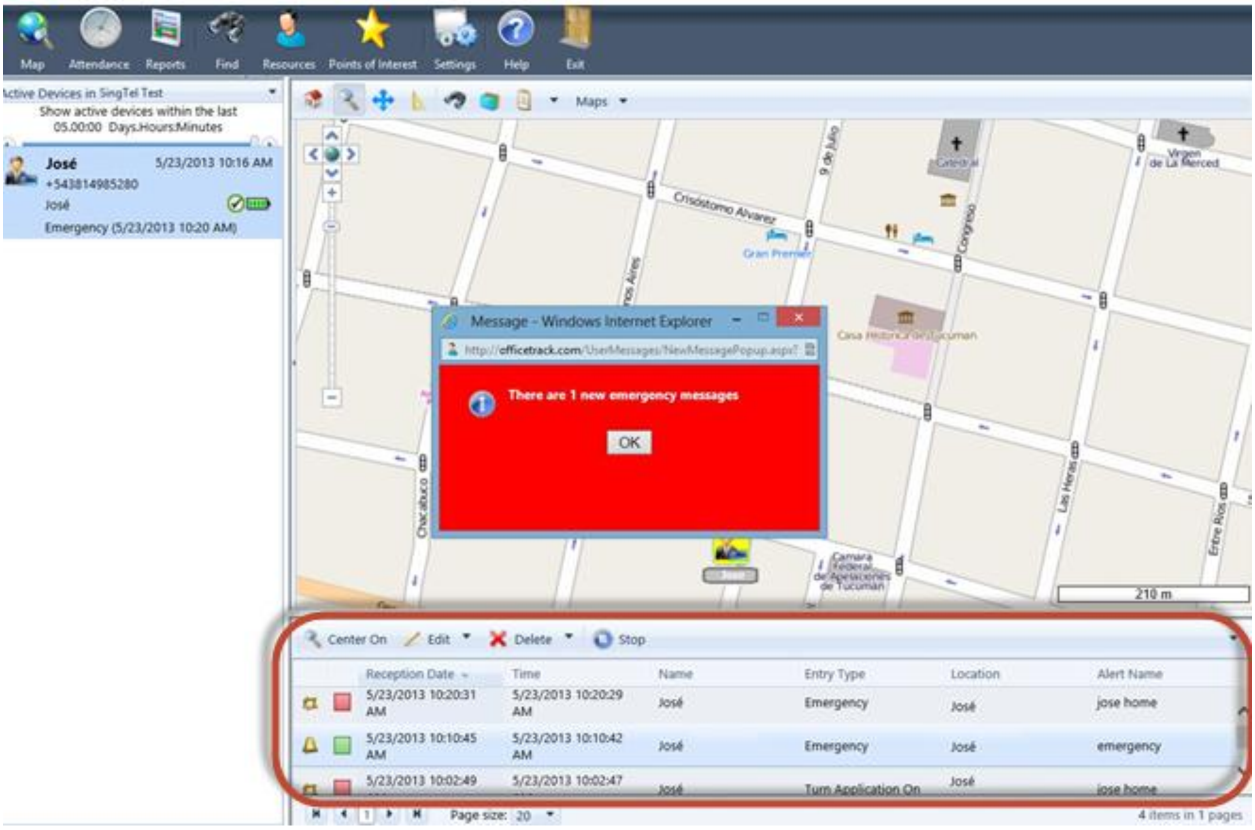
3.2 Resource List

This part of the main screen enables you to run several options per resource in the list and also to get immediate text and visual information about the resource's status.



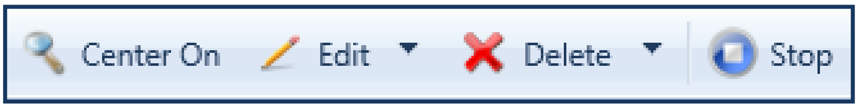
By selecting a specific resource from the list and right click with the mouse, you will have the options to perform "Center On". Click this option to focus the map on the location of the selected resource. You should select the resource you would like to focus on then double-click the resource.

3.3 Alert Window - Message List

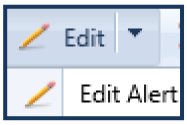


When an alert is activated, a window will appear in the lower part of the screen with the details of the alert and the corresponding resource, including a sound.

The window has the following toolbar:

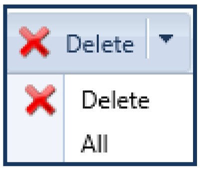


- **Center on** – Allows to center on the location that activated the alert.
- **Edit** – has 2 options:



- Edit – Edit the details of the resource that activated the alert.
- Edit Alert – Edit the details of the alert that was activated.

- **Delete** – has 2 options:



  - **Delete** – will delete the alert that is marked from the list.
  - **Delete all** – will delete all of the alerts that are in the window, and will close the window.
- **Stop** – Allows the user to stop the sound of the alert that was activated.

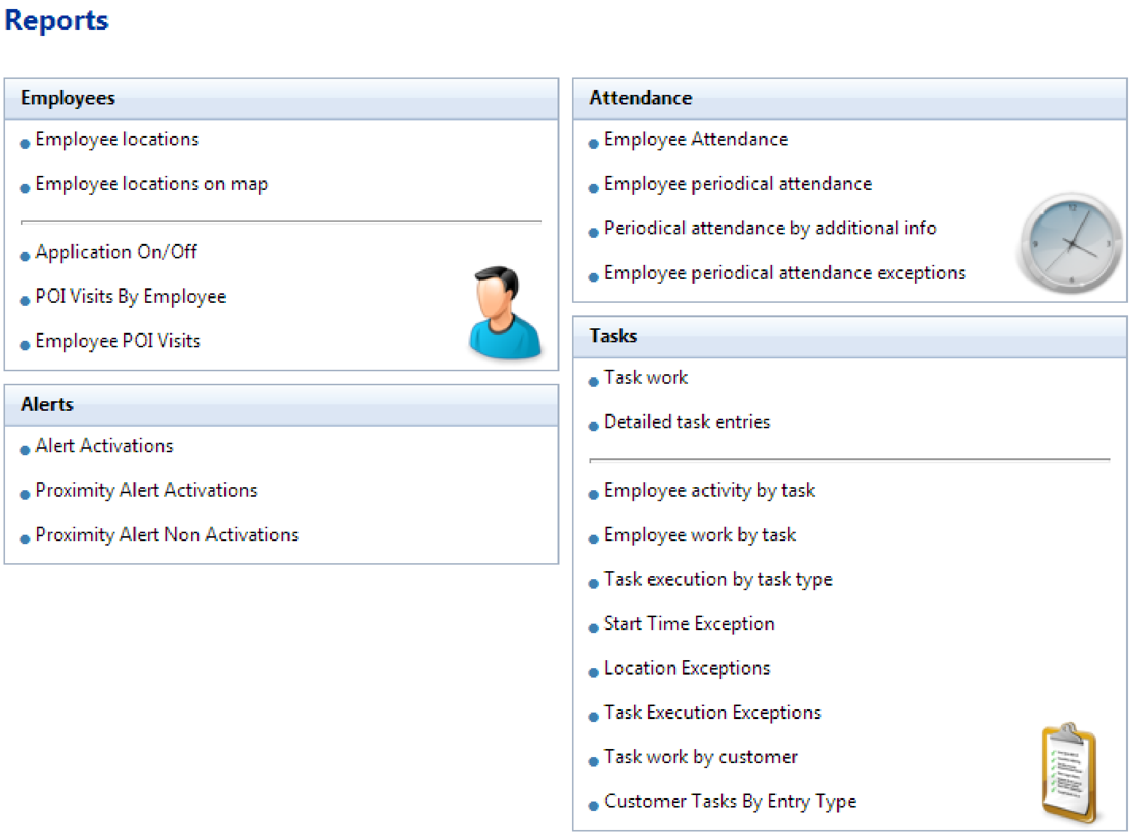
4 Reports

The reports allow you to view, generate and export reports from the system.

Note: The available reports will depend on the offer you purchased from myBusiness.

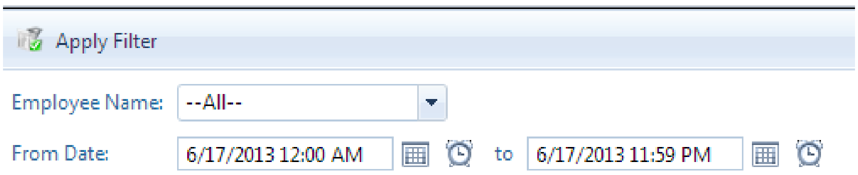
1. From the main menu, select Reports.

2. Select the report you want to generate.

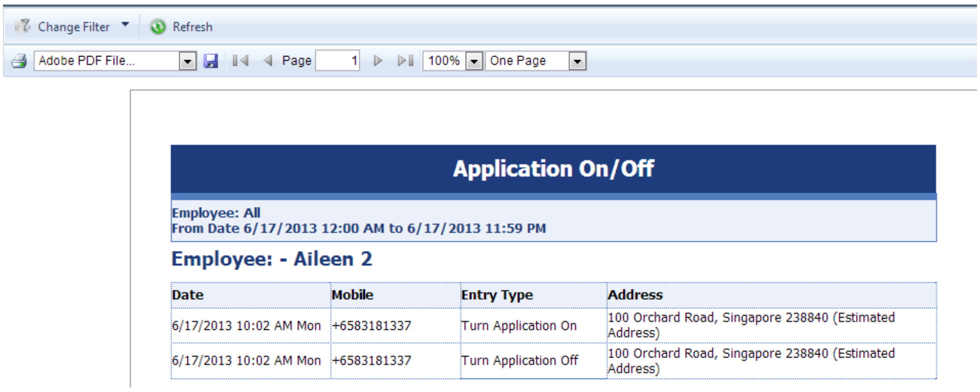


3. To change the displayed information, click Change Filter from the Toolbar.

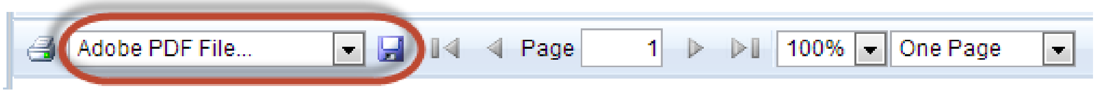
4. You can select the Employee Name, Start and End Date, etc. (depending on the report you selected).



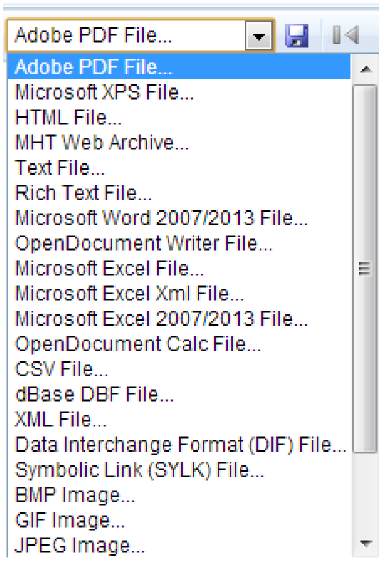
Sample Report below:



5. This report can be exported by on your desired format by clicking the file type on the toolbar and click Save icon.



Here are the available file types:



5 Workforce Attendance

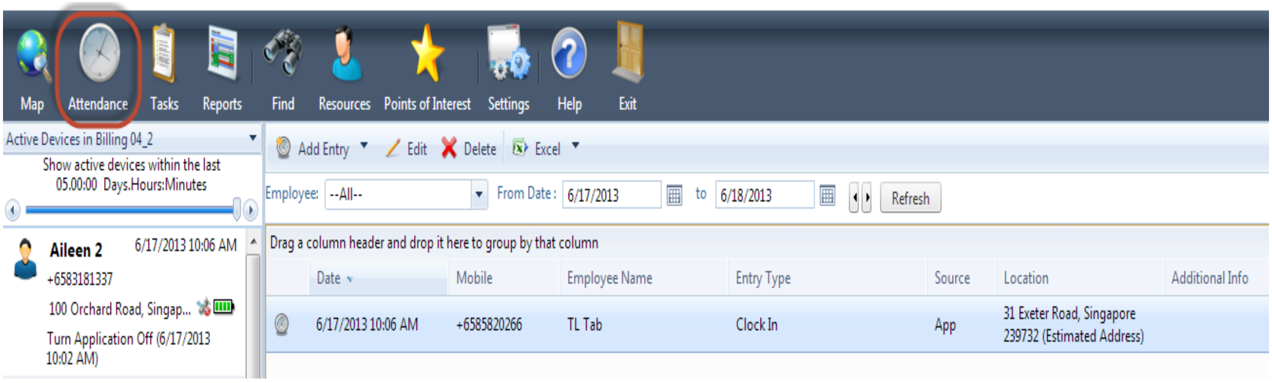
This section is applicable for Workforce Attendance & Workforce Management only.

This module describes the employee's attendance entries reported by the mobile application and device.

In order to see the entries that were made by a specific employee or on a specific date you can select the employee's name and the date you would like to see, and also to edit or delete the employee entry.

Checking Attendance entries of Mobile Users:

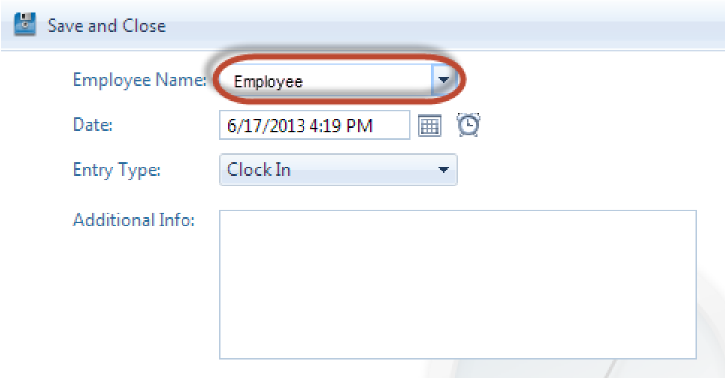
1. From the main menu, click Attendance.
2. Select the Employee you want to view and set the start and end date.
3. Click Refresh.
4. You will now be able to see the attendance submitted by your mobile users.



Adding Attendance entries of Web Users:

1. From the main menu, click Attendance.
2. Click Add Entry from the toolbar.

3. Select the Employee and Entry type from the list. You can enter additional information on the field.



4. Click Save and Close.

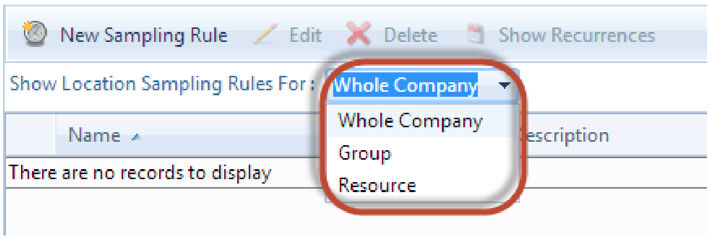
6 Workforce Tracking

This section is applicable for Workforce Tracking & Workforce Management only.

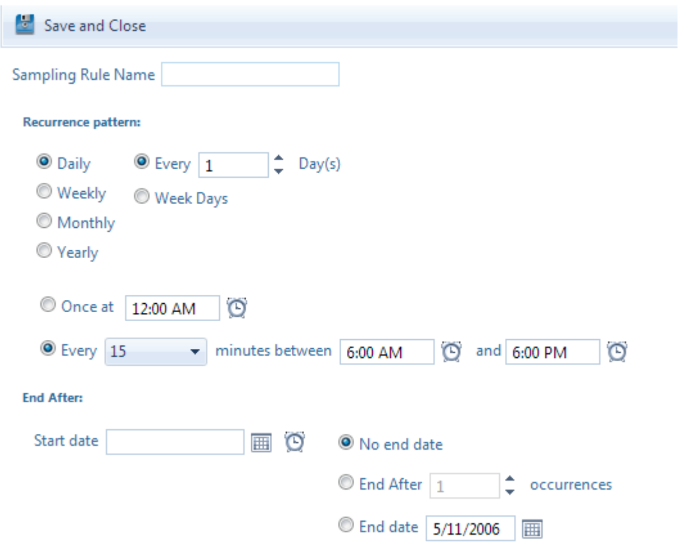
6.1 Defining Location Sampling Rules

You can define one or more location sampling rules for the entire employees in the company, a group of employees or a particular employee. For example if your employees work by morning and afternoon shifts the system will sample an employee's location only during his or her shift.

1. From the main menu select **Settings > Location Sampling Rules**.
2. From **Show Location Sampling Rules For** select whom the rule refers to:
    a. The entire company: **Whole Company**.
    b. A group of employees: **Group** and from the dropdown list select the group.
    c. For a particular employee: **Resource** and from the dropdown list select the employee's subscriber number.



3. Click **New Sampling Rule**.
4. From **Sampling Rule Properties** enter your required settings.

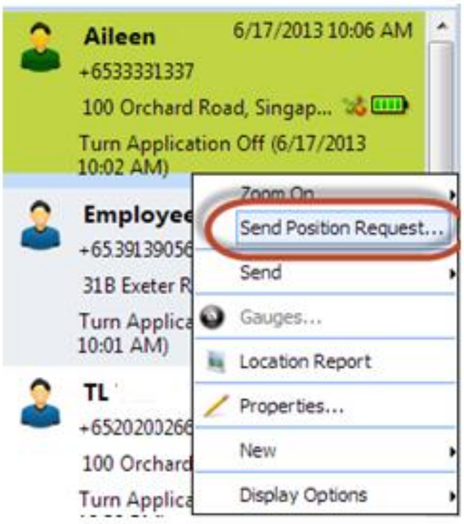


5. Click **Save and Close**.

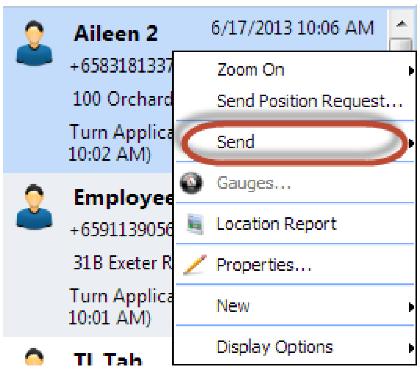
6.2 Manual Location Sampling

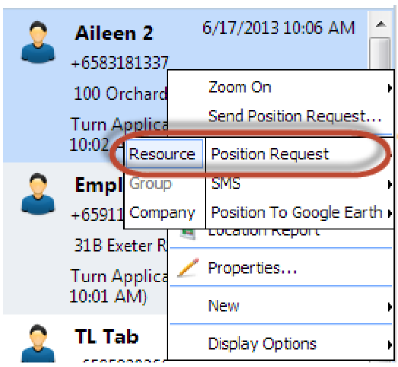
To sample the current location of your Resource:

1. On your Resource List window, select the resource you would like to have the current location of, then right-click and select “Send position request”

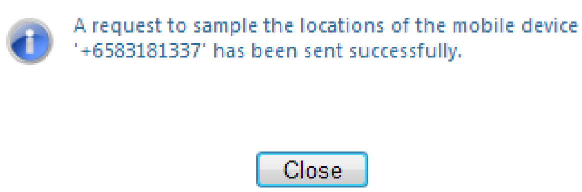


2. Or another option is right-click on a resource, select "Send", select "Position Request", and select a company, a group the resource belongs to, or resource.





3. A popup window will appear and click Close.



7 Workforce Management

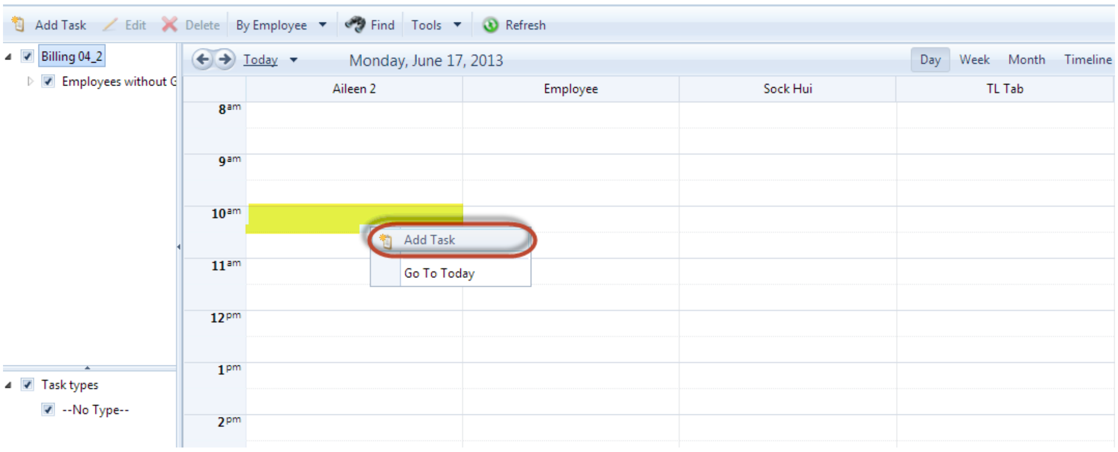
Note: All functionalities of Workforce Attendance and Workforce Tracking is available in Workforce Management.

7.1 Tasks

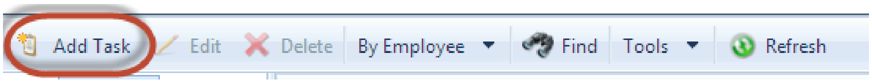
This module enables you to create tasks for an employee and to manage the tasks of your workforce.

1. From the main menu, click Tasks.

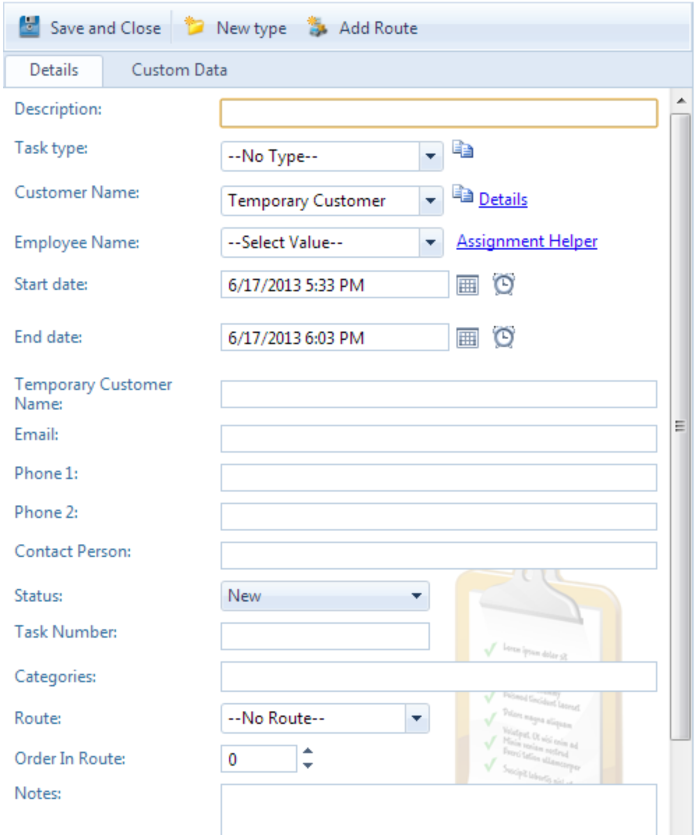
2. You will see the calendar view of your employees. Just like a normal calendar, right-click on the time of the employee and select Add New Task.



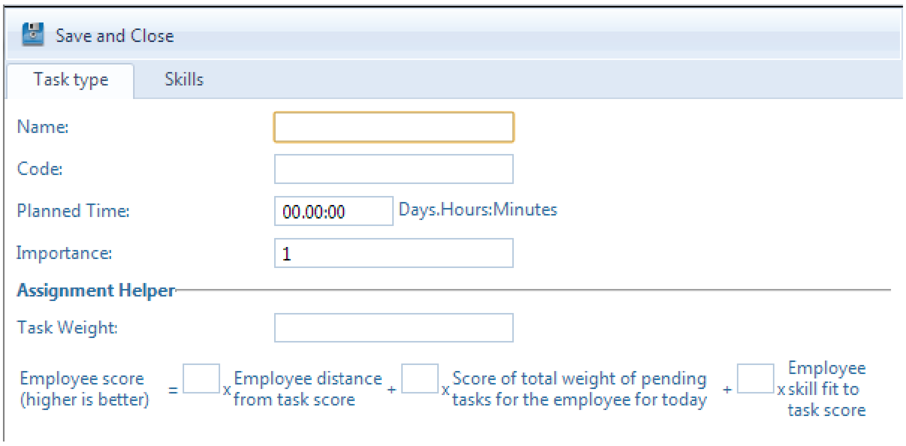
Alternatively, you can select Add Task from the toolbar.



3. The Task Properties popup window will appear. Enter the details of the task and select which Employee should this be assigned to.



Note: The Assignment Helper beside the Employee Name can be used if you have defined your Task Type as below:



Based on your defined Task Weight, the system can check who is best suited to do the task.

4. Click Save and Close.

Once you have saved the task, it will be received by your employee on their mobile device.

7.2 Forms

Forms enable you to create mobile forms for your field employees. The employees can fill out or can let your customers fill out the forms directly from their mobile devices.

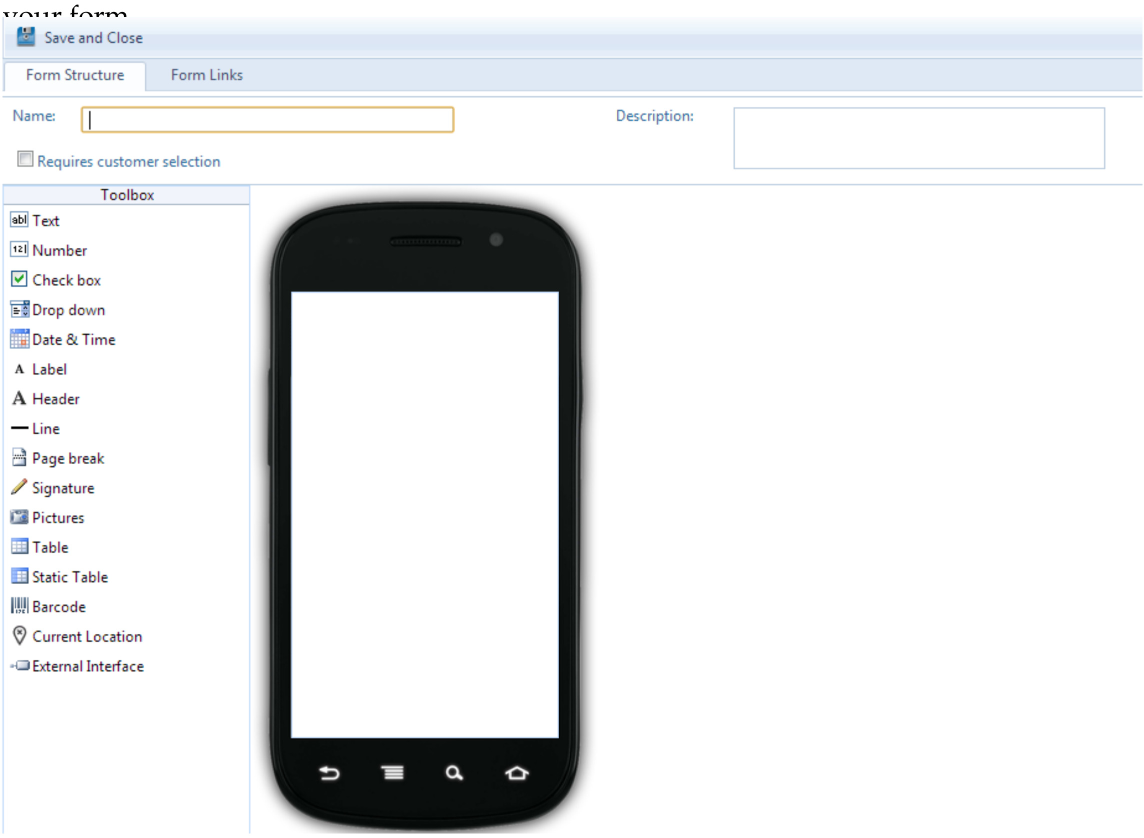
- You can design the form with fields and labels at your choice.
- You can attach your form to an existing system report regarding attendance, tasks, orders, or ordered catalog items.
- You can also design an independent "stand-alone" form.
- You can view information regarding a filled out form in a report where you can retrieve from **Reports**

To create Forms:

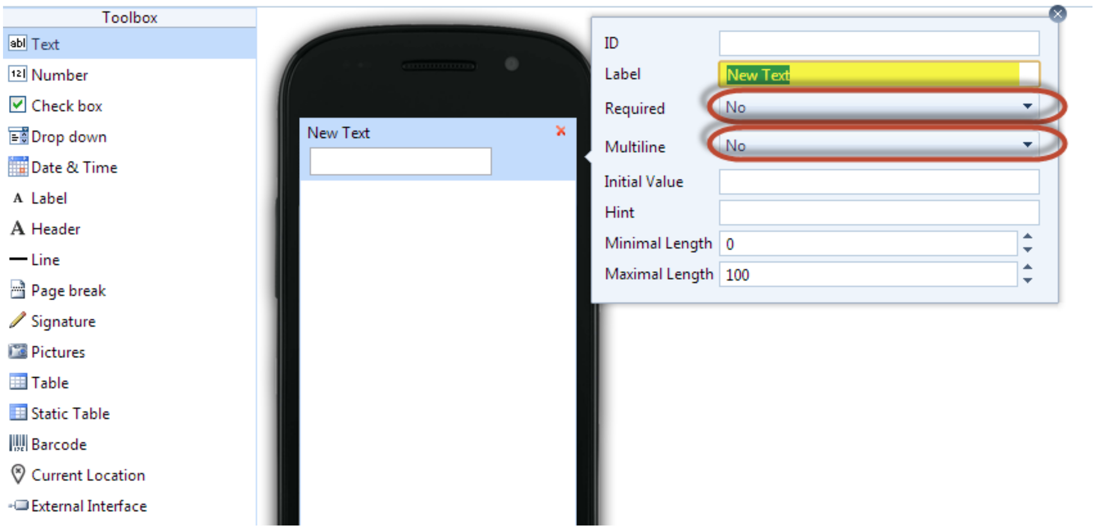
1. From the main menu, click **Settings > Forms**.

2. Click New Form on the toolbar.

3. The Form Properties popup window will appear. Fillout the Name and Description of your form.



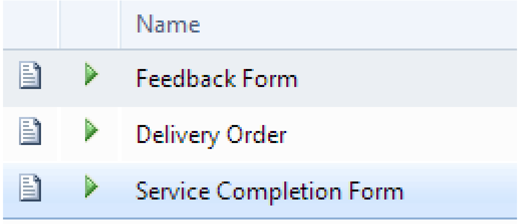
4. Start to drag and drop the labels from the Toolbox to the mobile device screen area.



5. Once you have dropped the label to the screen, a call out window will appear for you to edit the settings. (e.g. Label of your text, if Required or not, etc.)

6. Click Save and Close once you are done.

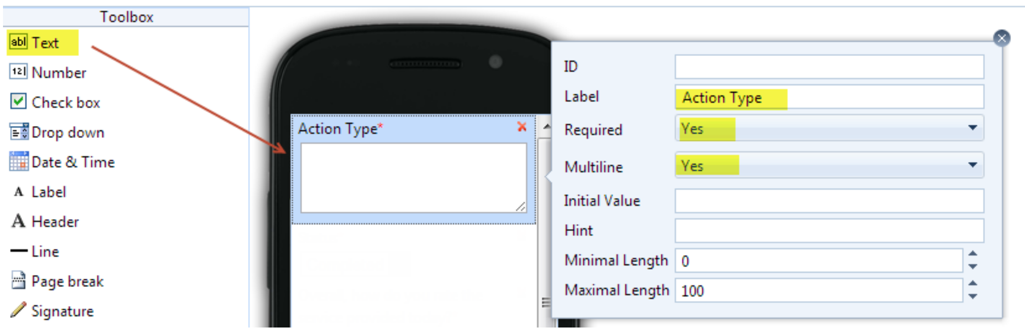
There are custom forms available for you to use or you can duplicate so you can start working with forms.



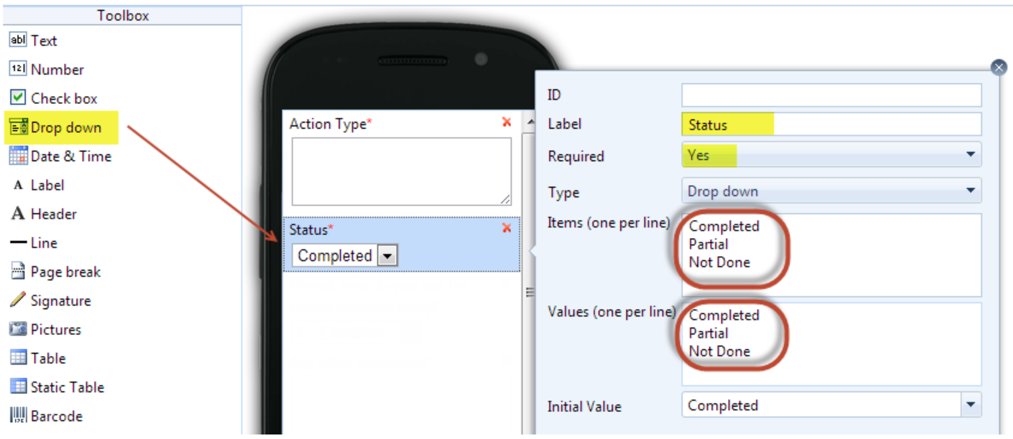
Feedback Form

To create a Feedback Form, follow these steps:

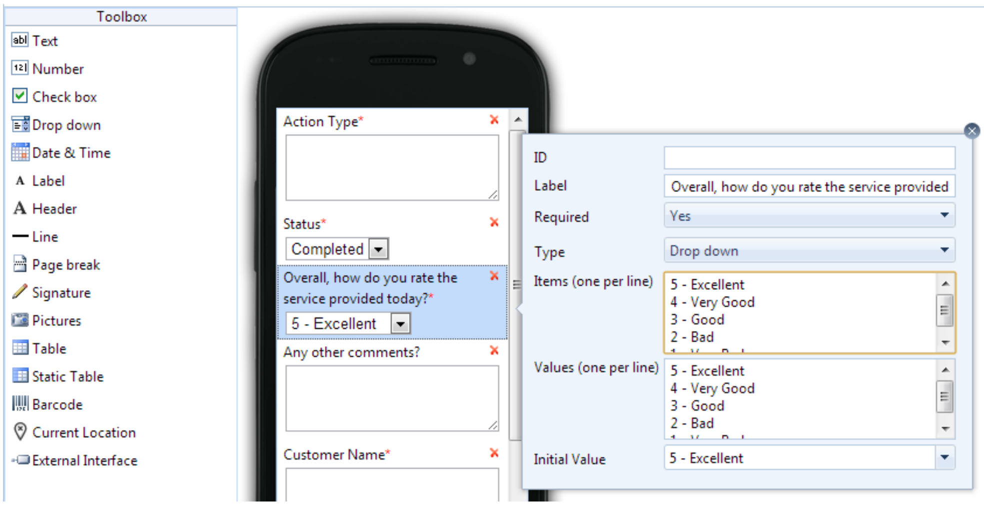
1. On the Form Properties window, enter the Form Name and Description.
2. From the Toolbox, drag and drop Text and edit the Label and settings on the call out window.



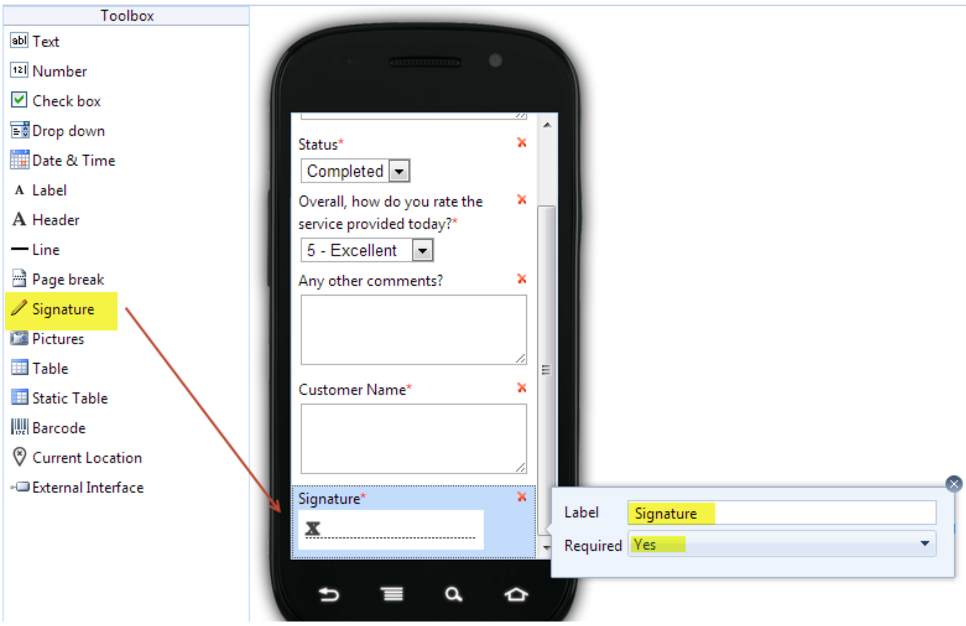
3. Next is to drag and drop Drop down, enter the Label and settings on the call out window. For drop down list, enter the items and values you want to see on your mobile form and set the your preferred initial value.



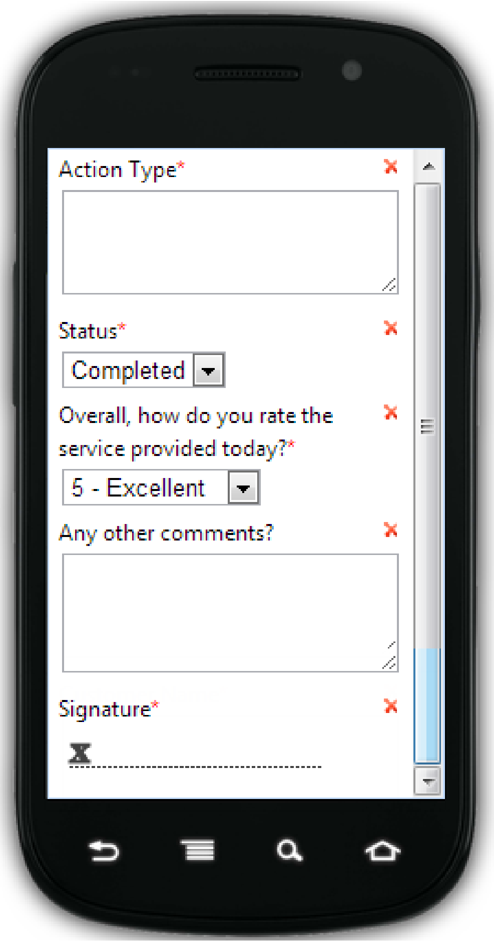
4. Do the same process for Drop down for you feedback ratings.



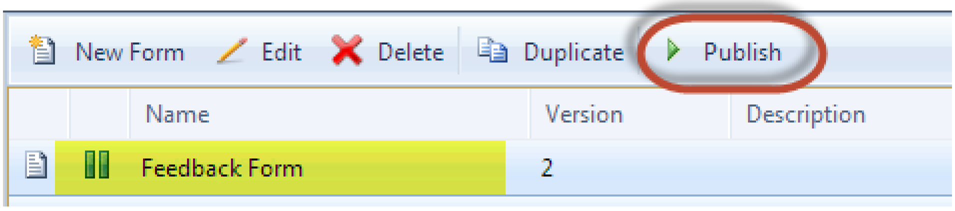
5. If you want your customers to enter other comments as well as their Customer name, drag and drop Text again and edit Labels accordingly.
6. If you require your customer's signature, select Signature from the Toolbox and drop it to your mobile screen.



This is the complete version of your Feedback Form.



7. Click Save and Close.
8. You will be redirected back to the Forms list. Select the form you just created and click Publish from the Toolbar.



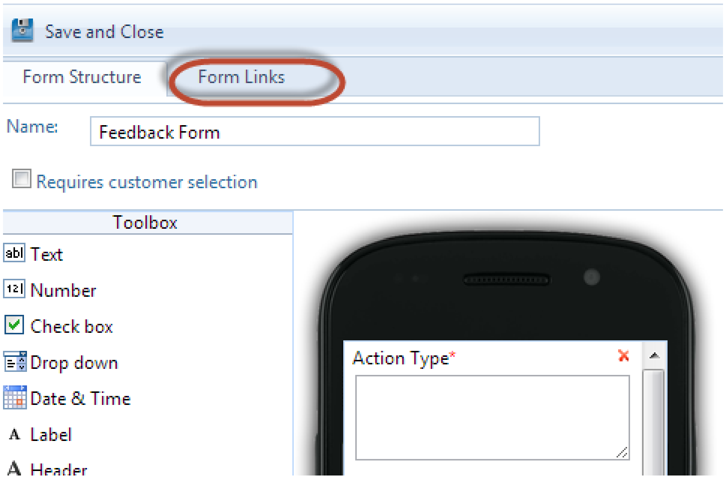
Once it is published, the forms will be pushed to the mobile devices of your employees and they can start using the forms. If the forms are not visible yet in their mobile clients, inform your employees to go to Settings and click Full Data Sync.

*Note: This is only available for Android Devices.

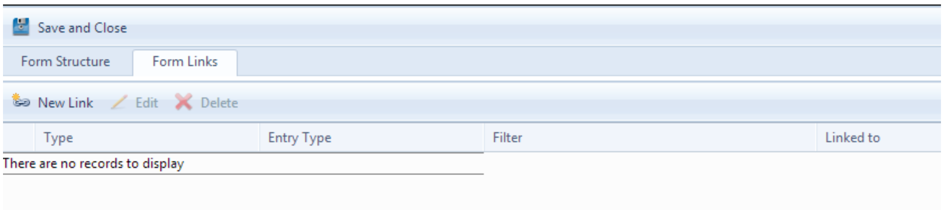
You can also link the form to a system report and/or define whether the form is displayed to the entire employees in the company, a certain group of employees or only a particular employee.

1. Select the form you want to link to a specific report and click Edit.

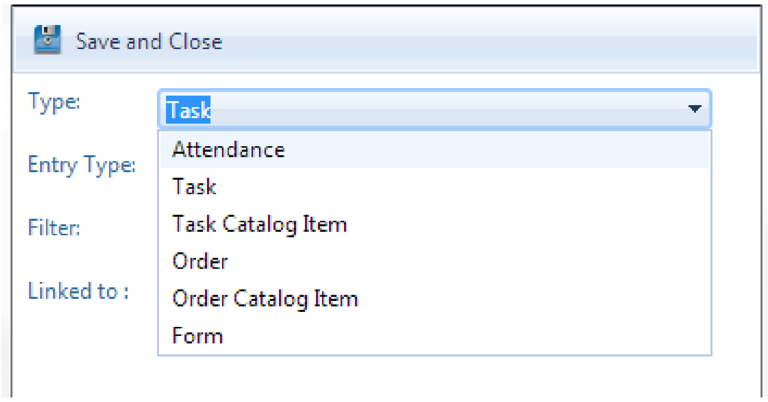
2. On the Forms Properties, click the Form Links tab.



3. Click New Link on the toolbar.



4. The Form Link pop window, select on which type you want this form to be available and set your preferred entry type.



5. Click Save and Close.

This will then be available to the mobile devices.

7.3 Catalog

This section is to allow your mobile users to search the company's products and services.

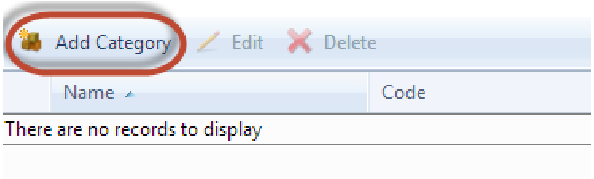
7.3.1 Categories

Categories enable you to categorize/group your items that will help your mobile workforce to search for specific items.

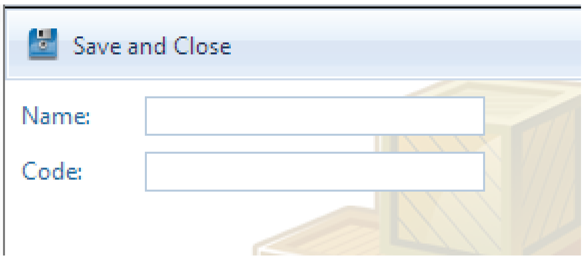
To add Categories:

1. From the main menu, click **Settings > Categories**.

2. Click Add Category from the toolbar.



3. Enter your desired name and code for your category on the popup window.



4. Click Save and Close.

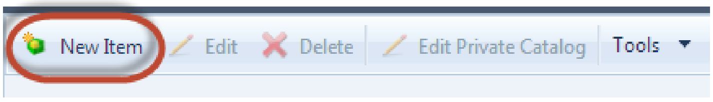
7.3.2 Orders (Items)

This section is for you to add in the company's items (products & services) that can be viewed by your mobile workforce.

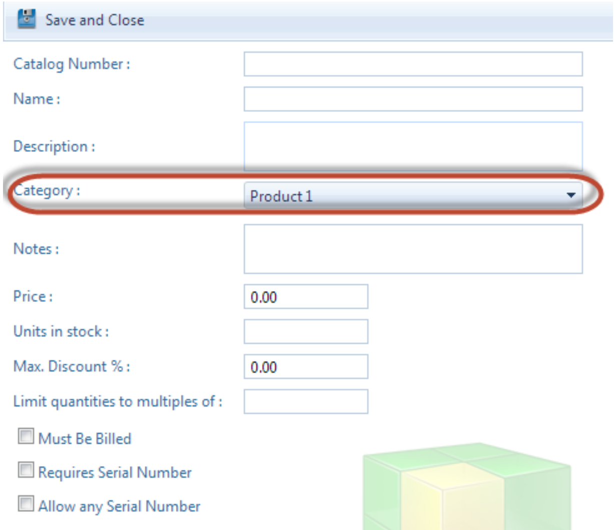
<u>To add Items in your Catalog:</u>

1. From the main menu, click **Settings > Items**.

2. Click Add Item from the toolbar.

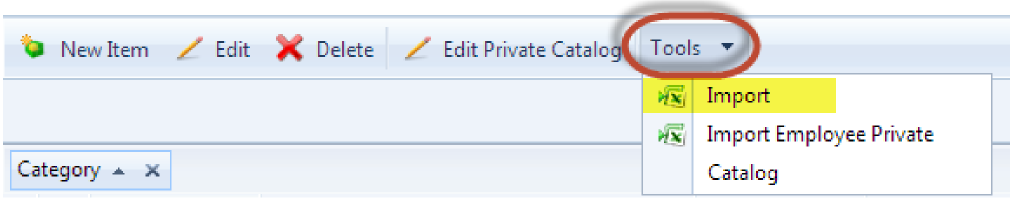


3. Enter your Item settings on the popup window. You can select the category you want this item to belong to.

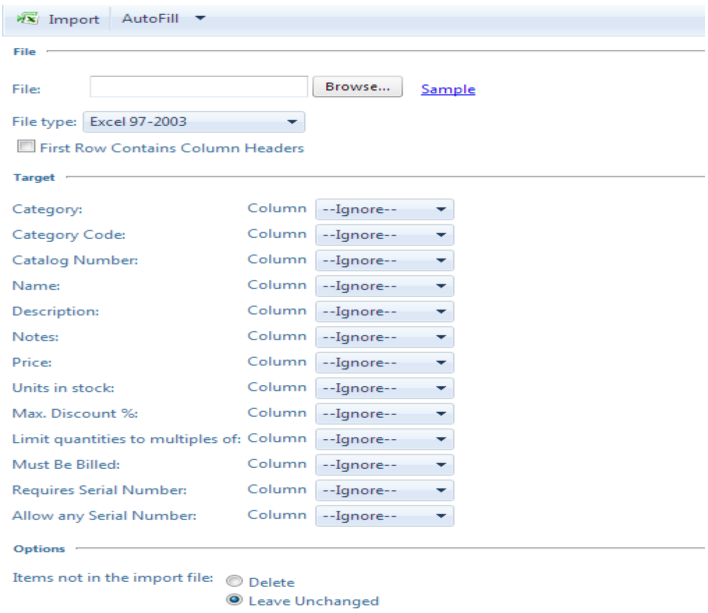


4. Click Save and Close.

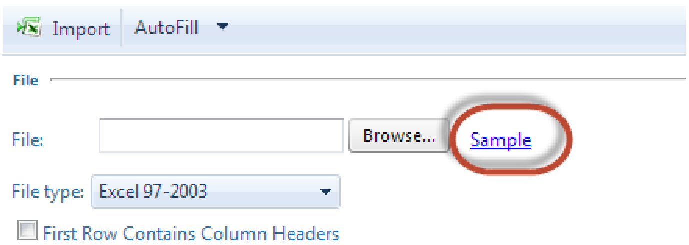
Alternatively, you can import your Items by clicking Tools and click Import.

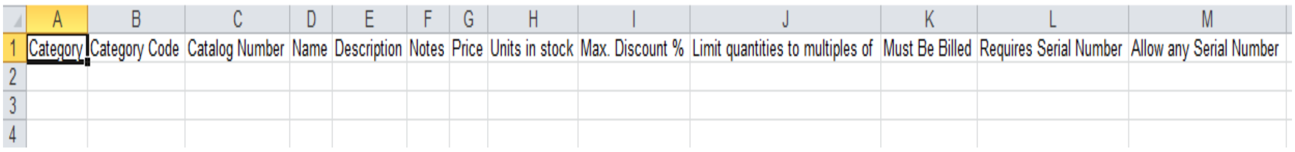


From the popup window, browse the file you want to upload and match the labels based on the columns of your spreadsheet.



You can also download the Excel template by clicking Sample and enter your catalog details and upload.





Click Import once done.