Track On

Track On: Field Team Mobile Application User Manual

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The accuracy of this guide has been checked and evaluated. Its instructions and descriptions are correct for the Track on application. However, future versions and instructions may change without notice. Green Lantern IT Solutions accepts no responsibility for direct or indirect losses resulting from errors, omissions, or conflicts between the program and the handbook.

Revision History

Revision No	Updated By	Updated On	Comments
4.1.0	Rayudu	28/04/2023	Initial Release
4.1.1	Rayudu	06/05/2023	Updated based on Checklist
4.2.5	Rayudu	06/06/2023	
4.4	Rayudu	29/09/2023	Updated based on Checklist

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About this Guide

This tutorial explains how to use all of the Track On mobile application's features and gives through operational instructions.

Purpose of this Guide

This paper describes the Track On mobile application's functional and system-level aspects. This document details the work of an internal workgroup to create the Track On standards.

How this Guide is Organized

This manual is divided into the following chapters:

Chapter 1 - The "**About this Guide**" section introduces you to the Track On mobile product.
Chapter 2 - The "**Introduction**" section contains thorough information on the Track On mobile Product.

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Contact Information

We welcome your feedback and recommendations on the document's quality and usefulness. You can contact us at the following address if you have any questions, comments, or recommendations for the documentation:

TABLE 1 CONTACT INFORMATION

For General Inquiries	For Sales Inquiries	For Technical Inquiries/Support
Email:	Email:	Email:

Track On Mobile Application

The Track On System assists organizations in managing their on-field team. Managers work hard to improve the process of prioritizing and finishing field assignments on time, reaching out to more consumers per day on the field, and attaining the shortest turnaround time possible. Track On provides businesses with a tool that aids in team management and service operations.

Track On System is made up of two parts: a web application and a mobile application. The web application is intended for managers or supervisors who will be monitoring the employee workforce. The Team Member can use the mobile application to indicate attendance, attend meetings, assign assignments, request leave, take breaks, and contact the Manager.

The system requirement of the mobile hand set for Android based Smart phone for field personnel areas follows:

1. Android 5.0 and above
2. Built-in SD Card Storage: > 1 GB
3. Internal memory: 160+ MB
4. An extra battery or charging mechanism for a cell phone should be kept on hand for a location update frequency of every 10 minutes.
5. A data plan for mobile data service. The minimum size of a data plan is determined by the amount of data to be collected in the field. Typically, the 2GB/month plan suffices.

Installation of Track On Mobile Application

The mobile application is for on-the-job personnel who can use it to register their attendance, attend tasks, take breaks and leave, and contact their boss as needed.

As soon as a team member is added to the application, an SMS with the APP Download link and login and password is delivered to his registered mobile phone.

Click on install application to download and install the application

1. Click Open.
2. The system displays the splash screen shown below.

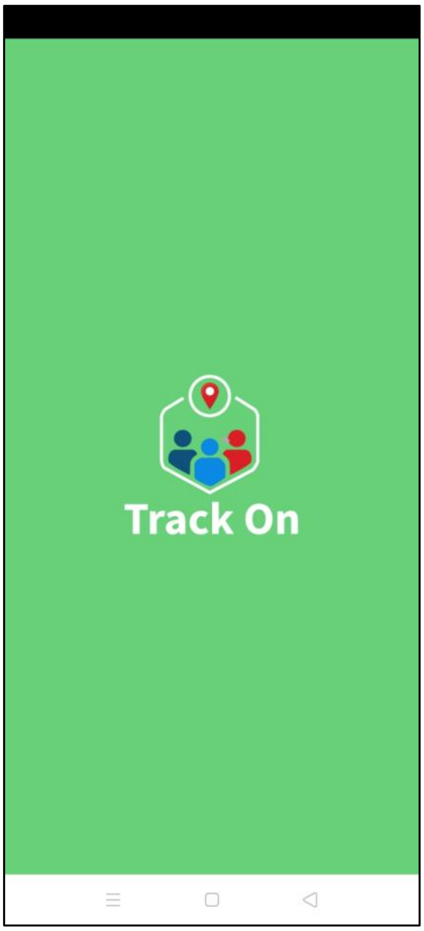


FIGURE 1: Splash Screen

To Login

1. On the Login screen, enter a valid Username and Password.
2. Select the Sign In option.

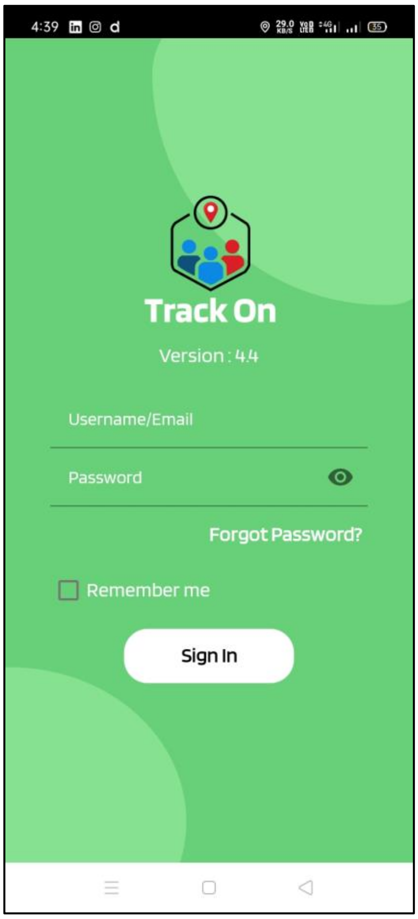


FIGURE 2: Login Screen

Home Screen

After logging into the application, Team Member defaults to the Home screen.

The Attendance and Task features are displayed in a grid arrangement on the Home Screen. If a task is assigned to a field member, the count will be displayed on the task icon.

Team Member can view the Home screen by following the below steps:

1. Select the Hamburger icon.
2. Select the Home tab.

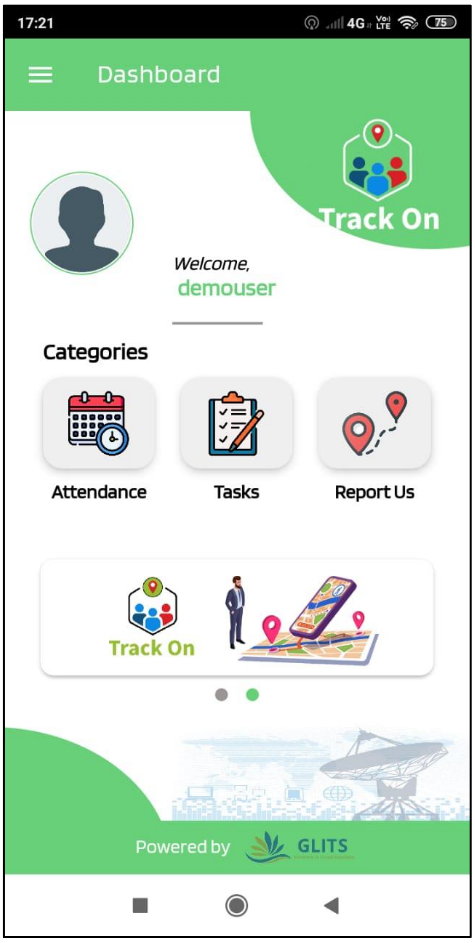


FIGURE 3: Home Screen

Profile

Each team member has the ability to modify his profile image. The profile screen also includes information about the organization and the reporting manager.

1. Select the Profile Picture option.
2. Select the desired profile image from the gallery or camera by clicking the Edit icon.

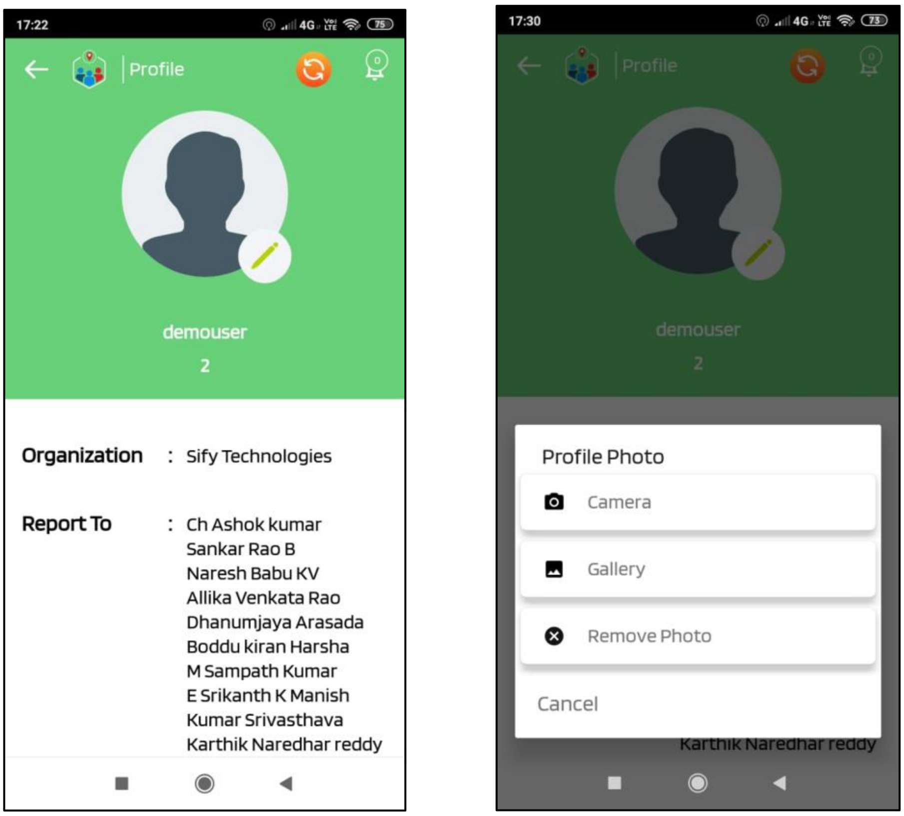


FIGURE 4: Profile Screen

About

The About Screen displays the Customer logo and the current version of the application.

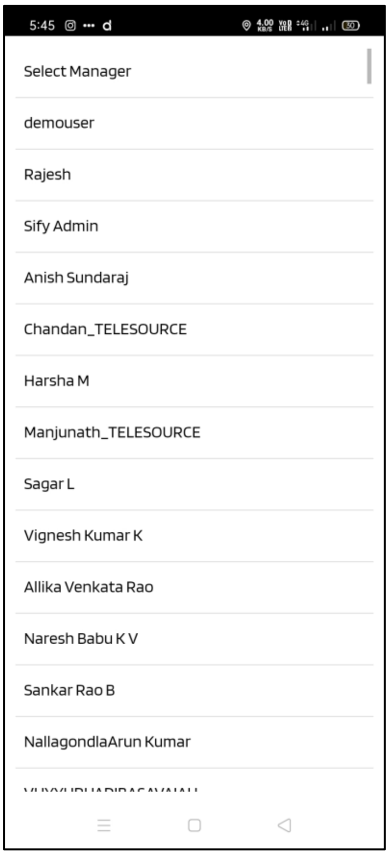
1. Select the Right Navigation Button.
2. Select the About tab.

FIGURE 5: About Screen

Call Manager

In the event that something needs to be discussed, a team member can call the reporting manager's registered mobile number.

1. Select the Right navigation Button.
2. Select Call Manager from the drop-down menu.



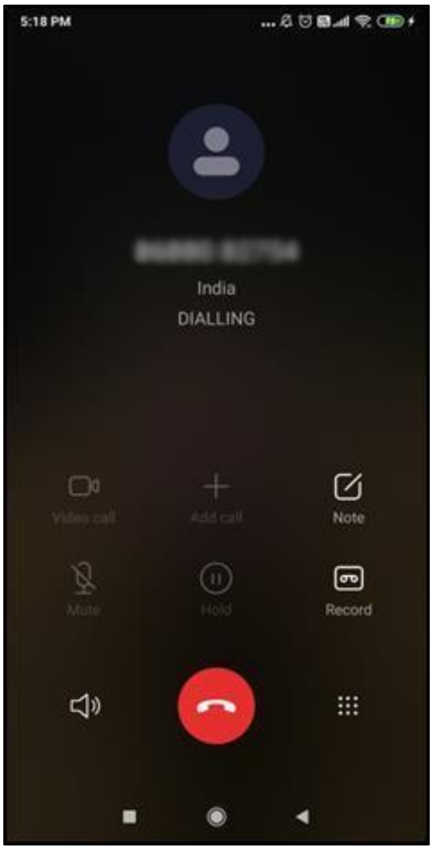


FIGURE 6: Call Manager Screen

Battery Optimization

Battery Optimization is a mobile setting that will not optimize the battery of the Mobile against the Track On application.

1. Select the Right navigation Button.
2. Select Battery Optimization from the menu.

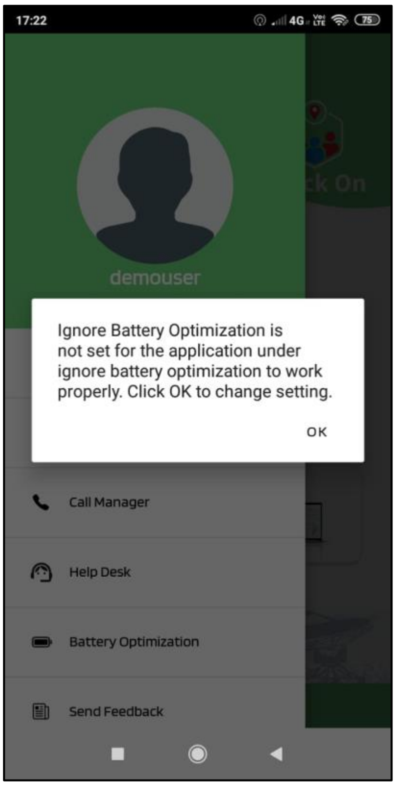


FIGURE 7: Battery Optimization application pop-up

Note

To keep location tracking active,Keep the battery optimization setting set To Don't Optimize' for the entire device.

Send Feedback

staff members can offer feedback to Green Lantern's support staff with questions or suggestions for the Track On application.

A team member will use their mobile device's mail account to send feedback.

1. Select the Right navigation Button in phone.
2. Select the Send Feedback button.

Logout

Members of the team can log out of the application at any moment.

1. Select the Right navigation Button.
2. Select Logout from the menu.

Attendance

Team members can record their daily attendance on the Track On app. Here is a space for Team Member to record his day's attendance.

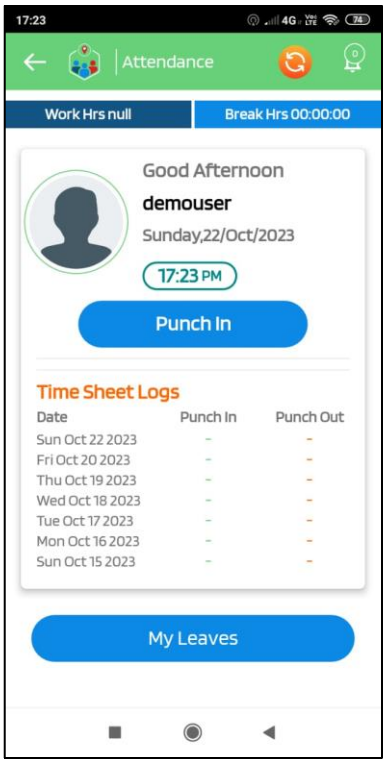


FIGURE 8: Attendance Screen

Punch-In

To record attendance for the day, each team member must punch-in. Depending on the settings made by the management, a team member can also execute Punch-In away from the office location.

1. To begin the day, click the Punch In button.

If a team member attempts to punch-in away from the base location, the program requests confirmation from the team member that he truly wants to punch-in away from the office, along with the Punch in time interval.

Punch Out

After finishing office working hours, team members can punch out for the day. The system will track each team member's office working hours (the time between punching in and punching out).

1. Press the Punch Out button.

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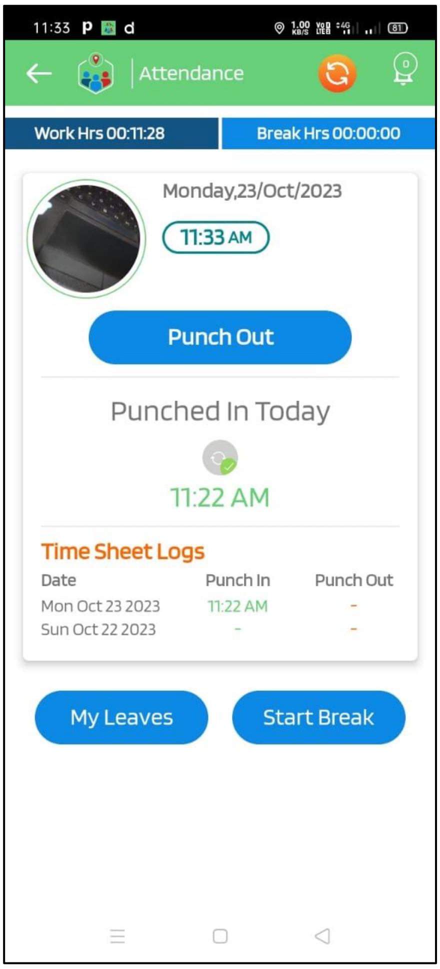


FIGURE 9: Punch Out Screen

Time Sheet Logs

Time Sheet Logs

Time Sheet logs record Team Members' attendance for the previous week. Team member attendance data contains the following items:

a. Date

b. Punch In time

c. Punch Out time

Start Break

This functionality allows a Team Member to take a break and notifies the management that the Team Member is on break.

Note

1. To take a break, a team member must indicate punch-In.
2. Break Hours and Work Hours are calculated separately by the application.

1. Start the break by clicking the button.
2. The app displays a confirmation message.
3. To confirm the break, click the Yes option. When you click the Yes button, the break Hour computation begins.
4. To terminate the break, click the No option.

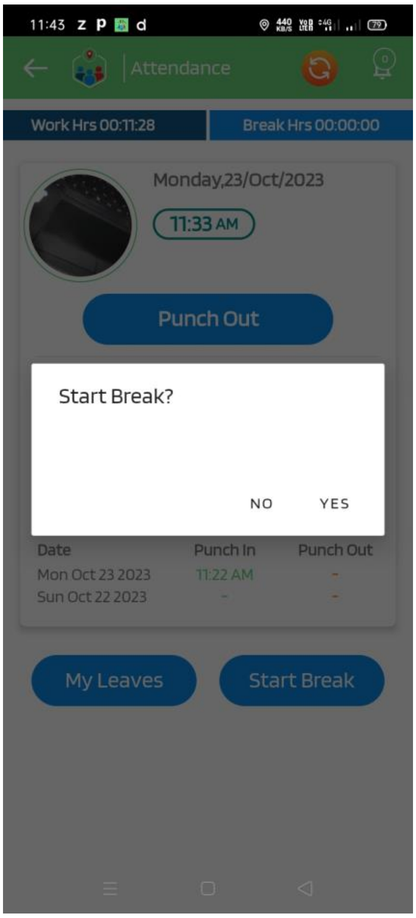


FIGURE 10: Break Start Confirmation Screen

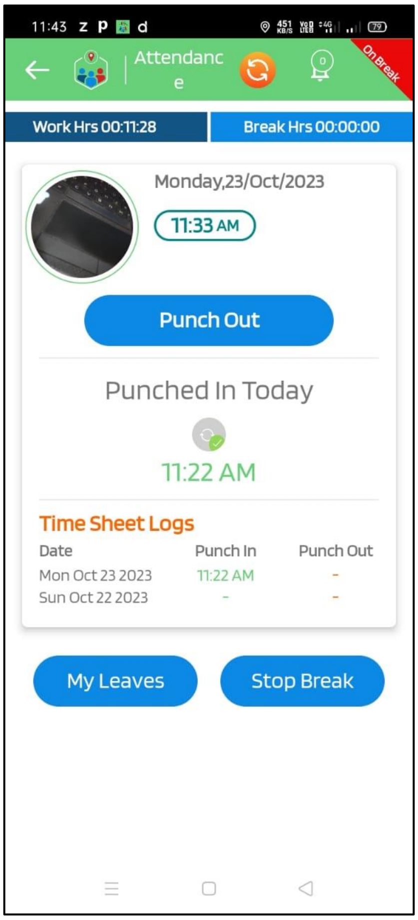


FIGURE 11: Break Started Screen

End Break

This functionality assists Team Members in ending their break so that the manager can receive an update that the appropriate Team Member has completed their break. Work hours begin calculating again after the break is over.

1. Select the End Break option.
2. Select the Yes option to End Break.
3. To continue the Break, select No option.

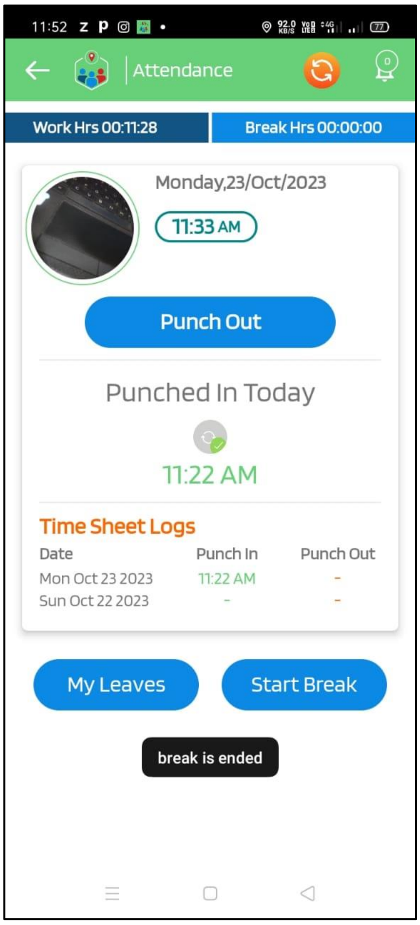


FIGURE 12: Break Ended Screen

My Leaves

A team member can ask the management for 'planned' and 'unplanned' leave. Team Member's leave request must be approved or rejected by the manager.

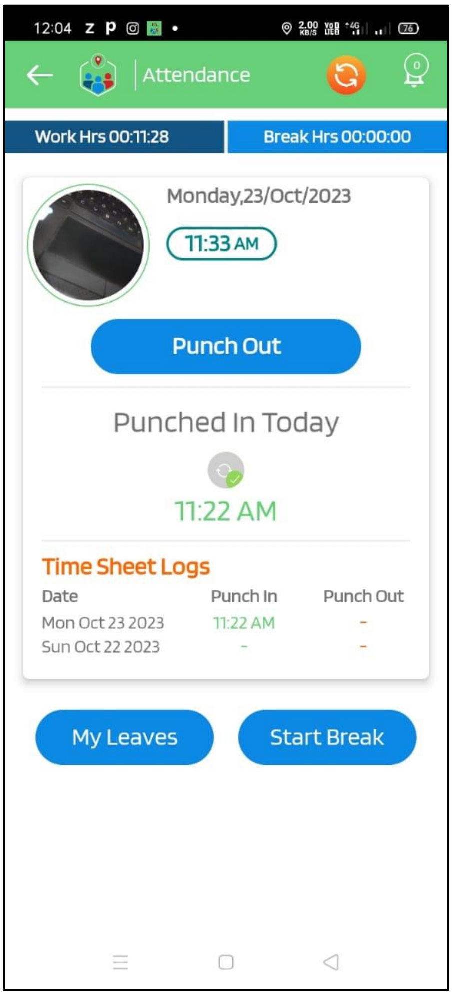


FIGURE 13: My Leaves Button

Click on the My Leaves button to view a leave summary that includes the purpose for the leave, the date, and the status of the leave as –

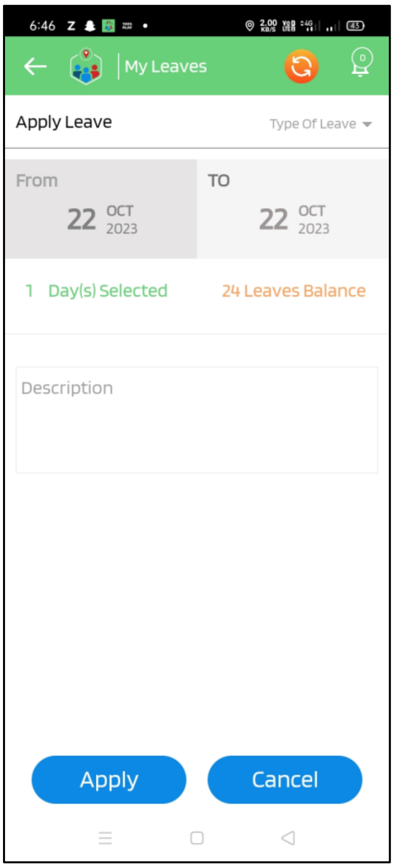
a. Requested
b. Approved
c. Rejected

It also displays the number of Balance, Applied, and Taken leaves.

FIGURE 14: My Leaves Screen

Apply Leaves

1. Select the My Leaves option.
2. Select the Apply Leave option.
3. Choose the type of leave from the drop-down menu.
4. Choose the Leave from and To Date options.
5. In the Description section, write a reason for leaving.
6. Press the Submit Request button.
7. The record will appear on the My Leaves screen.



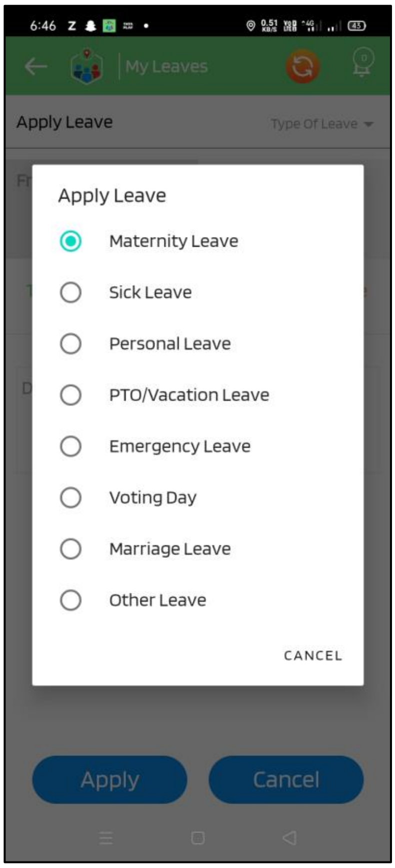


FIGURE 15: Apply Leaves Screen **FIGURE 16: Apply Leave Type Screen**

Task

From the Track On Web Application, the Manager can assign tasks to Team Members.

A notification push will be sent to each Team Member for each job assigned, updated, or deleted. When a job is assigned to a Team Member, he will receive a notification in the Notification icon on his mobile application, as seen below.

FIGURE 17: Task Notifications Screen

When you click the notification, the task list is refreshed.

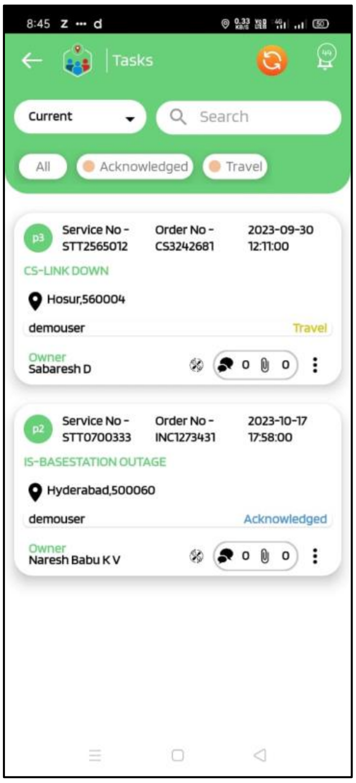


FIGURE 18: Task List Screen

1. Task shows in list view with details such as Order Number, Service Number, Team Members Assignment IDs, Task Name, Customers Address, Customer Appointment Date, and so on.
2. The Task tab displays information on tasks allocated to team members, with task status groups such as All, allocated, Complete, In Progress, and Incomplete.
3. The task screen is refreshed automatically every 5 minutes and can also be refreshed by pulling down the screen.
4. The task's initial status when assigned to a Team Member is assigned.
5. By sliding the screen upward, team members can see the entire number of assigned tasks.
6. Tasks can be found using the Order Number, Customer Address, and Task Name.
7. Task-related actions that a team member could conduct will be accessible after clicking the open menu (3 dots) symbol – a) Task Status update
   b) Add Notes and document

Every action has a unique feature such as:

Task Status update

When a task is assigned to a Team Member, the task's default state is Assigned, followed by the following statuses for a flow –

1. Assigned: A task has been assigned to a team member.
2. Acknowledged: A task is acknowledged by a team member, indicating that it has been accepted and that the team member will conduct work on it.
3. Travel: A team member began travelling to the task site.
4. Onsite - Waiting for access: A team member arrived at the job site.
5. Access Available – WIP: Team member got the access of task location to work on assigned task.
6. Checklist submitted: The checklist contains technical and customer comments. If the checklist is accessible with the job, the lead member must submit it.

7. UAT: A member of the team might mark UAT and wait for the SN answer. Team members will be unable to update the task status until Track On receives a response from Service Now regarding UAT. If the UAT response is "Success", the task status will be changed to "UAT Success." If the UAT response is "Failure," the task status will be changed to "Checklist submitted."
8. Complete: The assigned task has been done successfully by a team member

The following statuses are also in the task flow and will be used to designate the task status as not completed due to a specific reason.

a. **Reject:** A team member declines to conduct an activity on a task for a variety of reasons. After task rejection, the task will restart from Access Available - WIP.
b. **No Access:** A team member was denied access to the task location in order to complete the assigned assignment.
c. **Completed:** Task was not completed on the scheduled date owing to unforeseen circumstances. When a job is designated as Incomplete, a team member can seek a reschedule by clicking on the request for reschedule status.
d. **Cancelled Field:** A team member is unable to perform an activity on a task. The Cancelled status field comes after each task status.
e. **Cancelled Field:** A team member is unable to complete a task activity. Each task status is followed by the Cancelled status column.
f. A team member can update the task status based on the established flow of his work.

Task Notes and Attachment

At any step, a team member can provide notes about the assignment. To add notes to a job, follow the steps below:

1. Select the Open menu icon.
2. Select the Add Note option.
3. Fill in the text field with Notes.
4. If necessary, attach a file from your device.
5. Press the Submit button.

Added Notes are available in the Previous Notes section, along with the details of who added them and when. Attachment size is determined by the manager's maximum attachment size

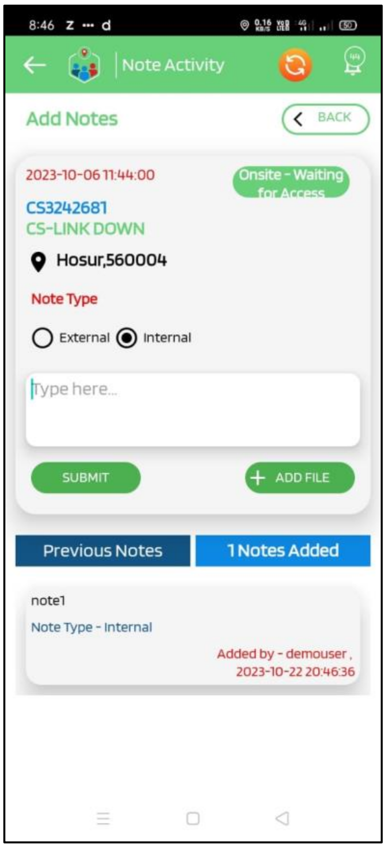


FIGURE 19: Add Notes and attachment Screen

Task History

Team members can access the task history, which includes the task information, task status flow, connected notes and documents, and forms filled out on the task.

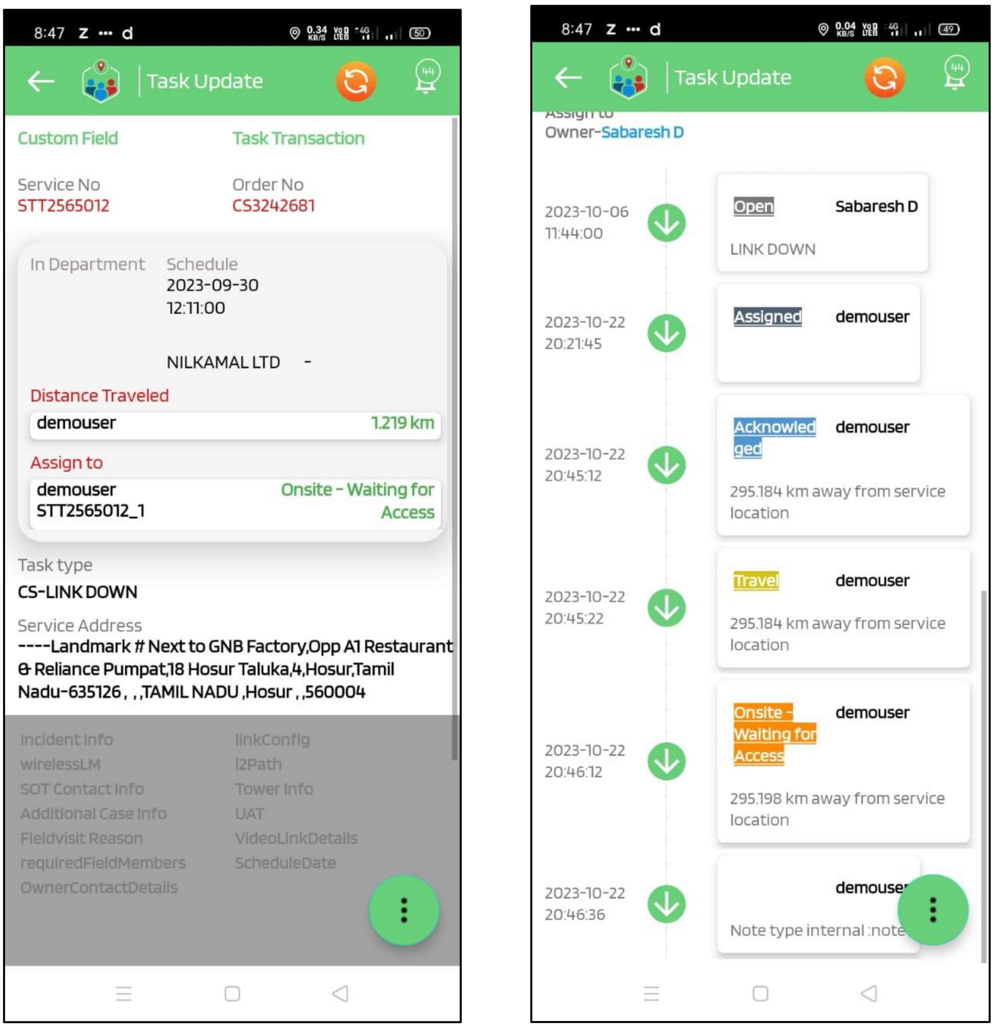


FIGURE 20: Task History Screen

View on Map/ Call Customer/ Mail Manager

Team Members can examine the statuses examine on Map, Call Customer, and Mail Manager by swiping right on the task cart.

View on Map

A team member can use the View on Map functionality to show the best route to the customer's location.

1. Swipe to the right to complete the challenge.

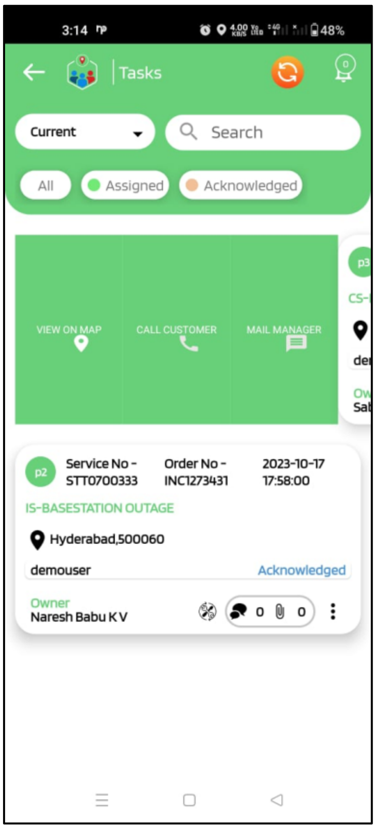


FIGURE 21: View on map Option Screen

1. Select View on Map from the menu.

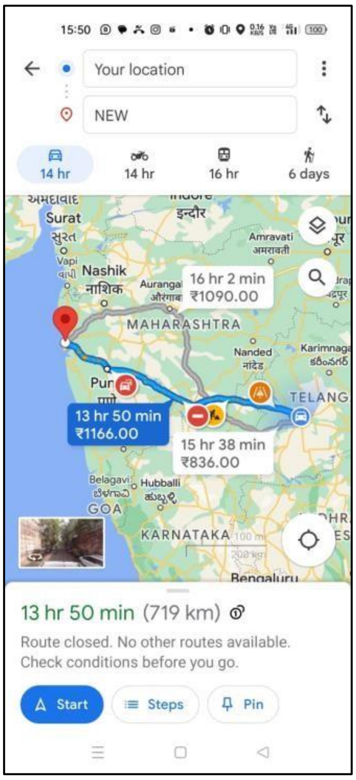


FIGURE 22: View on map Screen

Call Customer

In an emergency, a team member can phone the customer's registered mobile number.

1. Swipe to the right to complete the challenge.

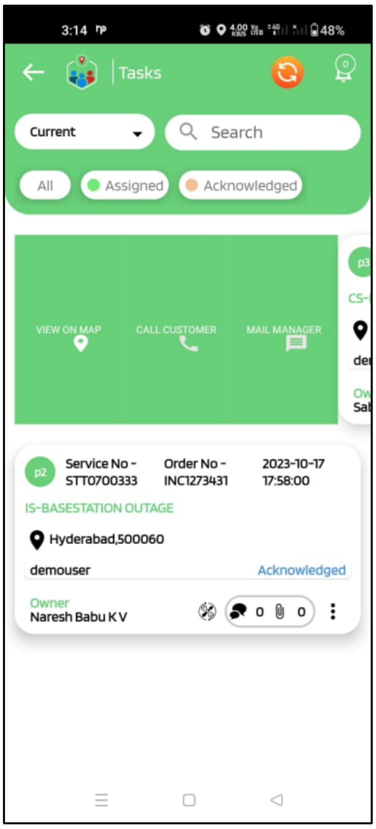


FIGURE 23: Call Customer Option Screen

1. Select the option to Call Customer.

FIGURE 24: Call to Customer Screen

Mail

In an emergency, a team member can send an email to the manager's registered email address.

1. Swipe to the right to complete the challenge.
2. Select Mail Manager from the drop-down menu.

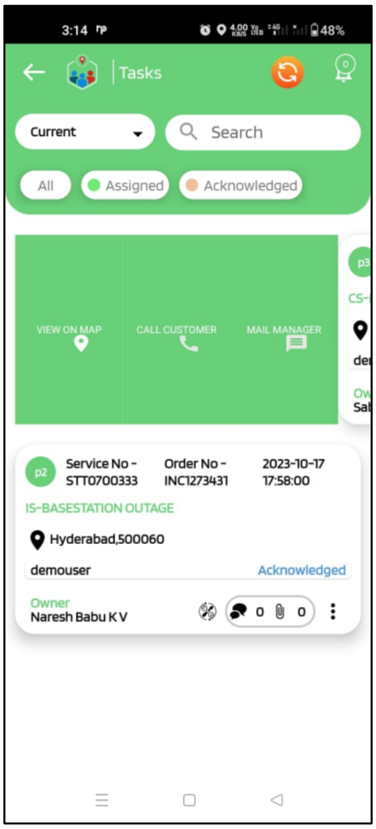
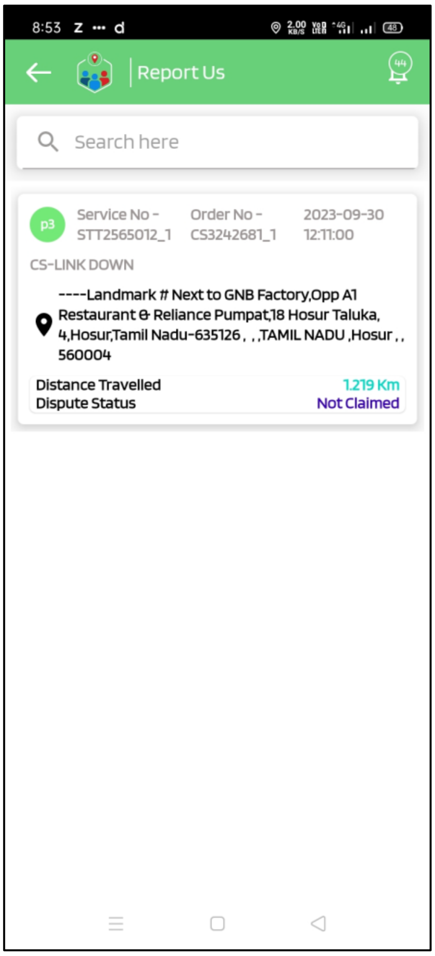


FIGURE 25: Mail Manager Option Screen

FIGURE 26: Mail Manager Screen

Report Us

Team members have the option to raise distance-related concerns. To initiate a distance dispute, a team member must submit a request for manager approval.



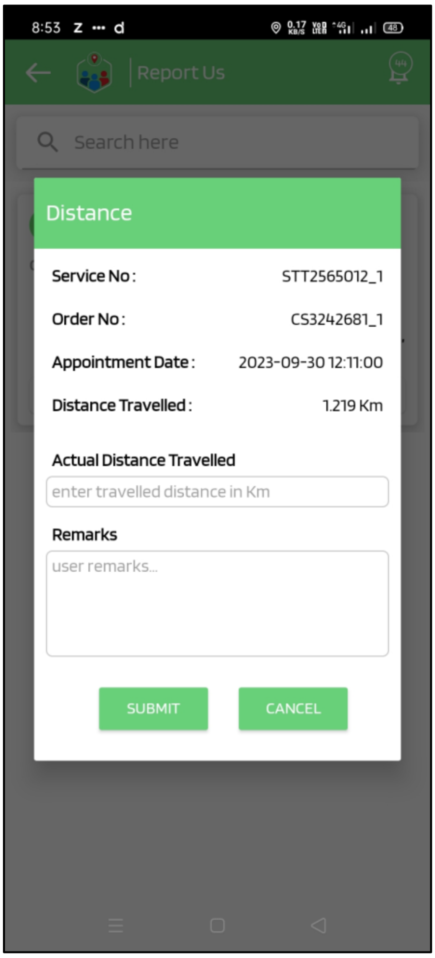


FIGURE 27: Report Us Screen

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