lighthouse
powered by TEAM Software

Mobile, Maps, and Reporting

Learner Guide

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TEAM Software

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Objectives

1. Learn how to log in/out on mobile
2. Explore the mobile app navigation and features
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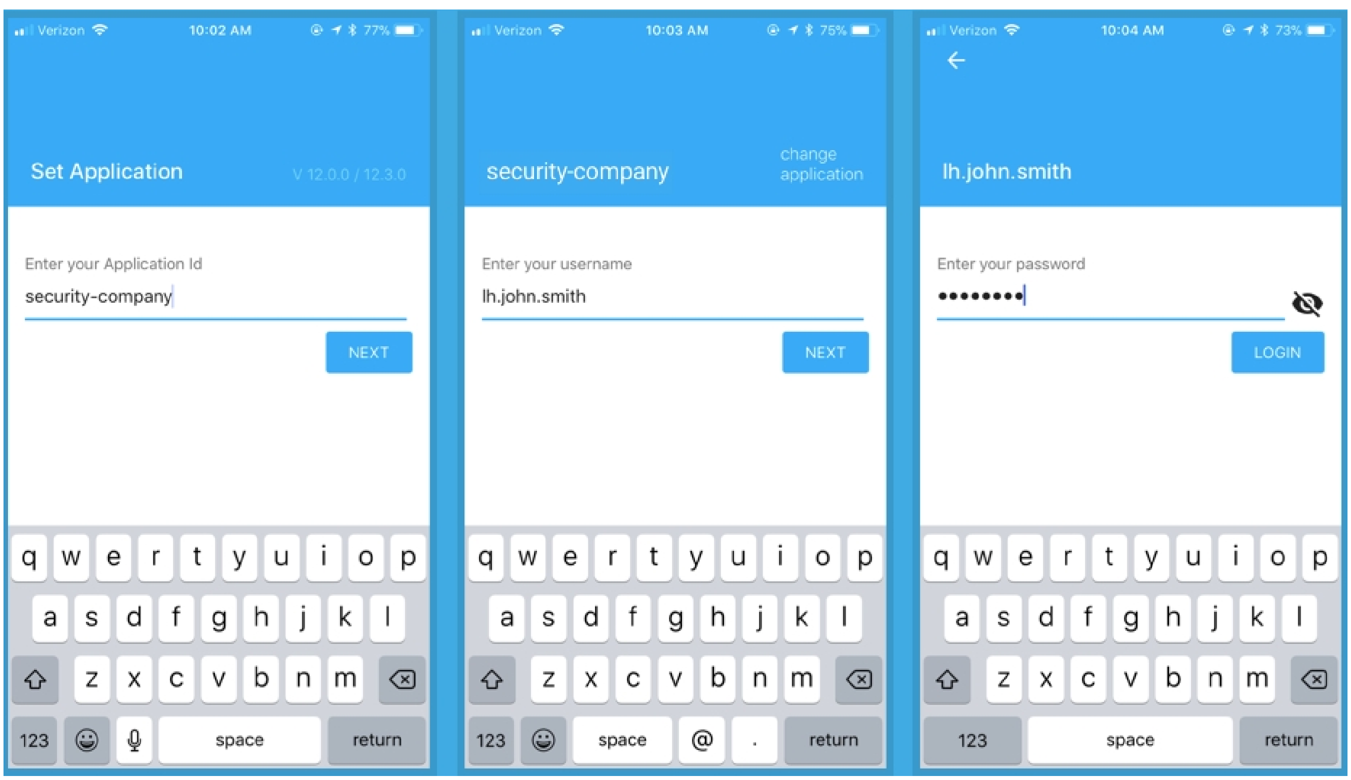
Lighthouse Mobile

Log in

Field employees can use the Lighthouse Mobile app to document issues, complete tasks/audits, send messages to other users, and log activity at your locations.

The app is available for Android in the Google Play store, and for iOS in the App Store. Search for "Lighthouse.io" to locate the app. It will be labeled as a Mobile Workforce Platform. When you download the app for the first time you will be prompted to accept permissions around notifications, updates, locations, motion/fitness, Bluetooth and for use of your camera. Ensure you enable all of the options by choosing allow/always allow and enable all of the options.

The first time you log in you will be prompted to enter an application ID, username and password. After the first log in, you will enter only your username and password.



- **Application ID** - A short identifier for your company. Often your company name or acronym (all lower-case). This will only be required for the first install/download.
- **Username** - Unique username or email address, (often incorporating your employee ID).
- **Password** - Unique password (provided by your company or established on first log-in to Lighthouse Web.

When the employee logs into the mobile app it automatically starts their shift, an inspirational message displays with a quote, and Lighthouse will start tracking their location. This message can be customized to include a safety reminder, motivational message, slogan or command center contact information. Notify Lighthouse/TEAM Client Services or your Implementation Specialist if you would like to customize this message.

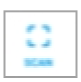
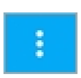
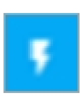
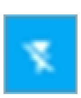
Features and Navigation

The Lighthouse mobile app gives field workers access to complete tasks, submit issues, conduct audits, send messages, and scanning of QR codes/NFC/Bluetooth beacons.

The mobile app automatically tracks employee location in the background, (as long as employees have accepted all location permissions). In the web, employees are visible on a live map and a complete record of location history is searchable in the Event report.

Mobile Icons

Icon	Use
	Menu - options to manage your shift
	Create - allows you to create a form or message group

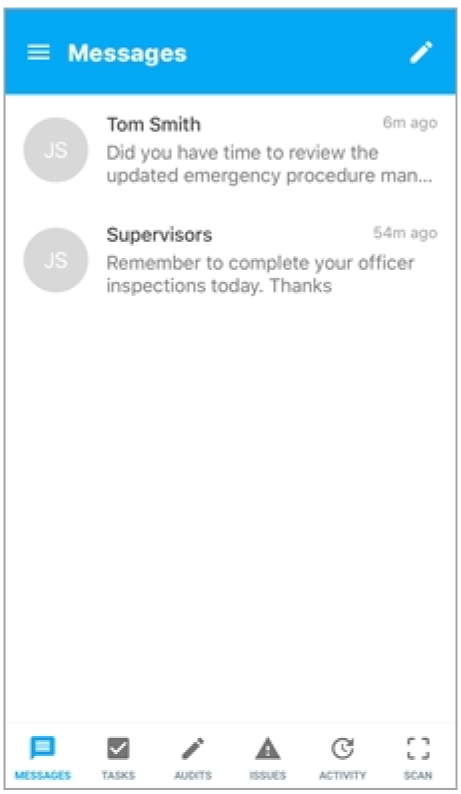
Icon	Use
	**Messages** - allows you to chat with other employees who are using the Lighthouse Mobile app or the web
	**Tasks** - allows you to fill out a form for repeatable or regularly scheduled activity
	**Audits** - allows you to fill out a form for scoring or assessing
	**Issues** - allow you to fill out a form for notification or escalation
	**Activity** - displays a chronological list of location activity
	**Scan** - used for scanning QR codes and NFC tags
	**More** - displays filter options for issues and activity
	**Lightning bolt/flash**- tap to turn off the mobile device flash light
	**No lightning bolt/flash** - tap to turn on the mobile device light so you can scan a QR code in low light environments

Module Navigational Icons

Across the bottom of the app are icons for each Lighthouse module.

Messages

Messages is your chat function. You can message one employee or groups of employees between web and the mobile app.



To create a new message, you first need to add a group (even if messaging only one employee). Tap the create icon (pencil) to name the group in the Group name field, select the logged in employees you want added to the group, enter the message text in the Type a message field, and tap the Send button. To add a new message to an existing group, tap the existing message group from the list of groups.

You can rename the group, and/or add/remove participants by tapping the gear icon and tapping the Save button.

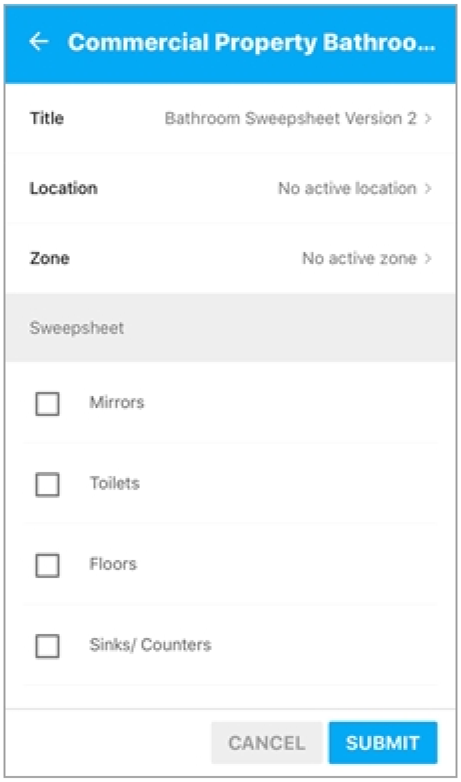
> **Note:** Once you add an employee to a message group, they are able to view the full history of the group message. If you remove an employee from a message group, they will no longer be able to view the message history.

Forms

In Lighthouse, tasks, issues and audits are form templates that employees can fill out and submit. There is a typical use for each form type.

Tasks

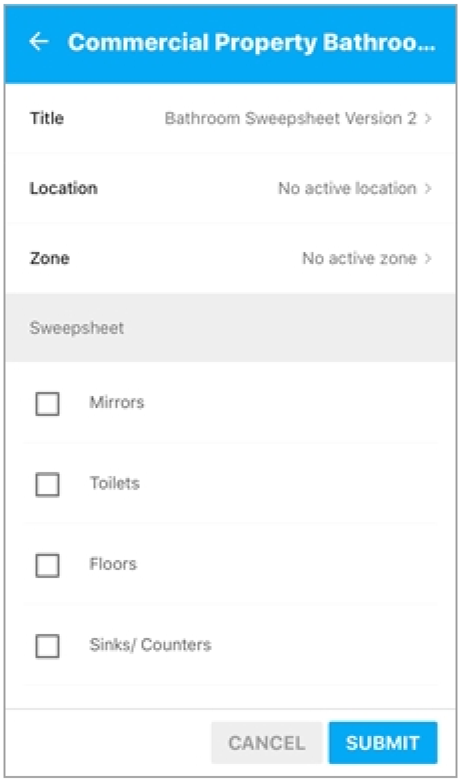
Simple data capture for repeatable or regularly scheduled activities where no followup action is required. This form type is often used for daily activity reports, restroom checklist, door/elevator/fire safety checks or post orders.



Task scenario; you can assign a restroom sweep-sheet to a QR code, NFC tag or beacon, so every time the employee enters the room or scans the code or tag, the task form displays so the employee can submit it with the details of which restroom it was completed on.

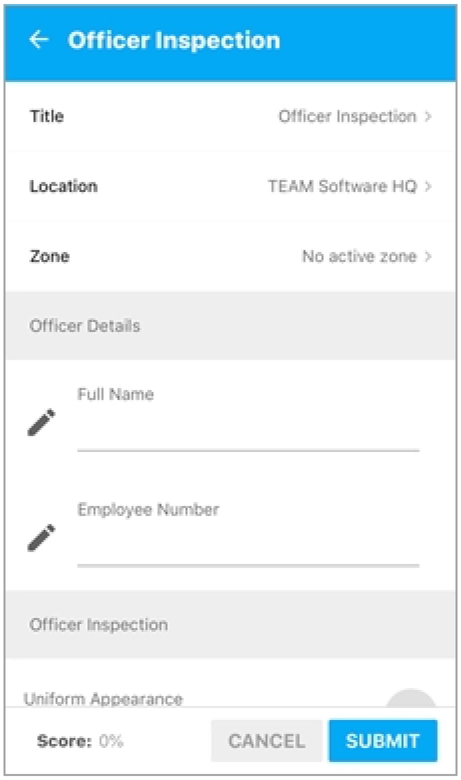
Audits

Reporting that needs a scoring or assessing quality. This form type is often used for officer inspections or for supervisor quality inspections.



Issues

Notification/escalations that require resolution and assigning responsibility. You can assign a status to this type of form and it can progress through *open*, *in progress* and *closed* statuses. This form type is often used for incidents, slip & falls, safety hazard reporting or to report a maintenance need.

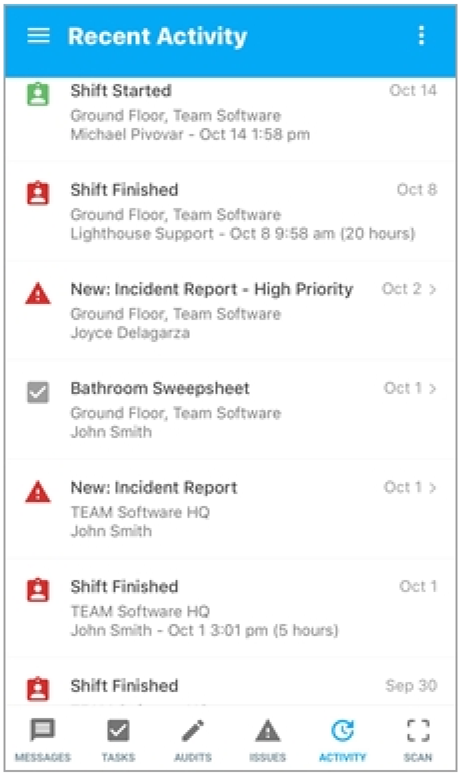


To submit a form (task, audit, issue) tap the appropriate form icon (at the bottom of the app), and then tap the compose icon (pencil), and select the template to complete. Once the mobile form opens, the employee needs to complete the appropriate fields and tap the Submit button to save the form.

Forms are very customizable. A future training session covers this topic in detail.

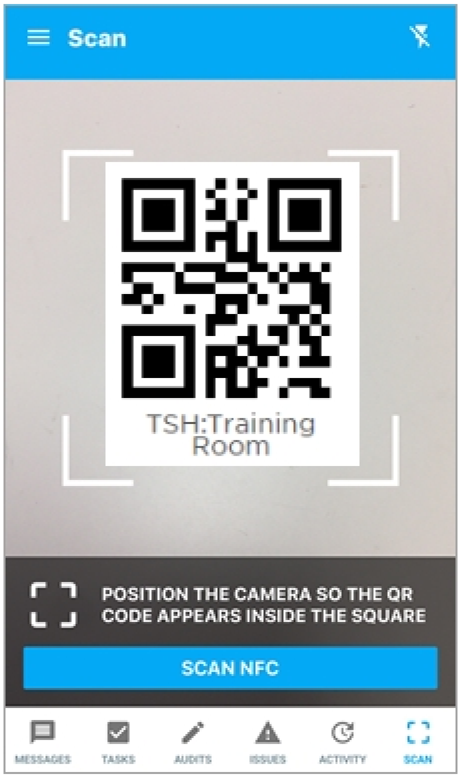
Activity

The Activity icon displays a chronological list of location activity including shifts started/finished, forms submitted and exceptions. If you select an activity from the list, additional details display. Also, if the user is at the location, the view displays the activity at that location. If the user is not at a location, the view displays all activity for all locations they have permission to view.



Scan

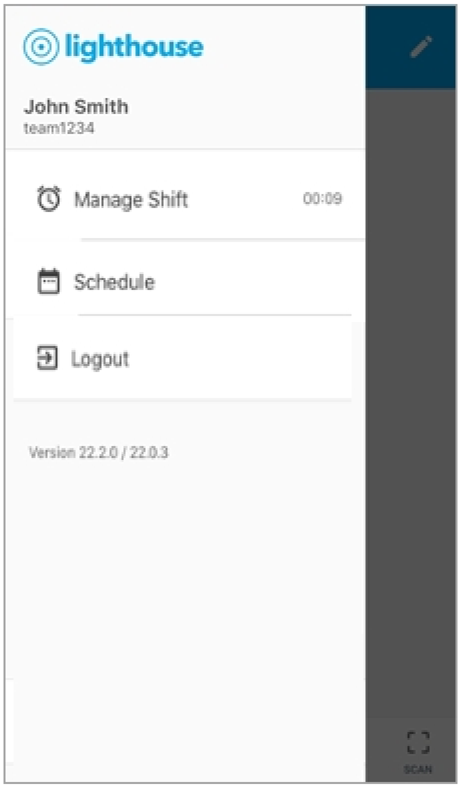
The Scan icon is used for scanning QR codes or NFC tags. When you tap the Scan icon it opens your device camera to scan the code and it displays the Scan NFC button. If a form has been assigned to a QR code or NFC tag, scanning the code or tapping the tag opens the required form for the employee to complete.



In low light locations, employees can tap the lightning bolt/flash icon to turn on the flashlight feature so they can scan the QR code. Once the scan is complete the user receives a Scan Successful message.

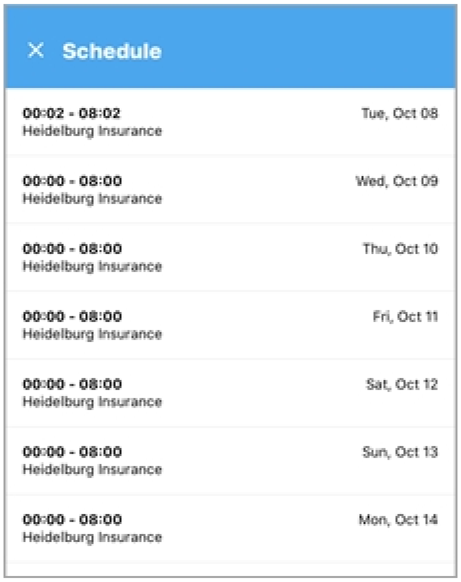
Menu

When you tap the menu icon (three horizontal lines), a slide out menu displays for options to manage your shift.



Tapping the Manage Shift option displays a slide out menu with the start time, location and active shift time. If the integration with TeamTime is set up, then the start time is the time that is transferred to WinTeam. Also, if we have enabled the ability for employees to take breaks, the buttons to start/end a meal break display at the bottom next to the End Shift button. The Logout option allows you to log out of the mobile app.

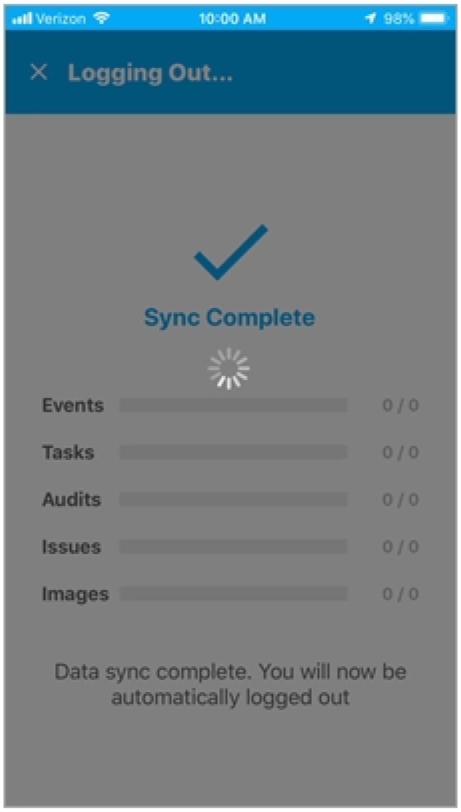
Note: If Lighthouse is integrated with WinTeam Personnel Scheduling, a Schedule option may display in the menu. Tap this option to display a view-only schedule for the user.



Log Out

When employees are logged into the app, Lighthouse is tracking the location, and when they log out it stops tracking.

To log out of the mobile app, tap the menu icon (three horizontal lines) to open the slide out menu and tap Logout. Once the employee confirms, the app syncs data that has cached during the session.



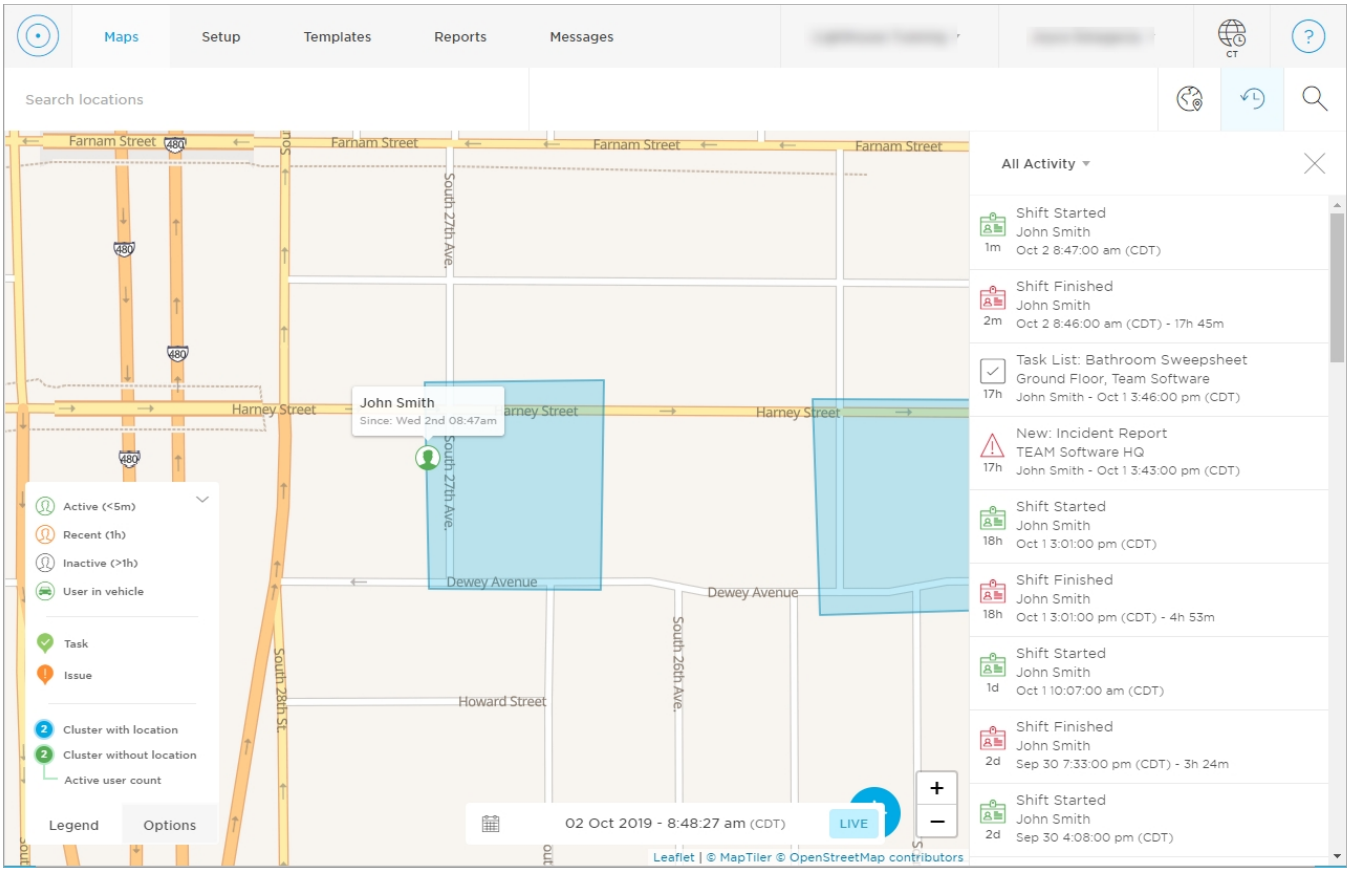
Note: The employee needs to have a data (cellular or WiFi) connection to log out of the Lighthouse mobile app.

Lighthouse Web

Maps

The maps view in Lighthouse Web is the focal point for all tracked activity. From this view you can do almost everything you can do in the mobile application. You can set up your locations/buildings/zones, search for logged in employees, view recent (and history) active at locations, and report new form tasks, audits and issues.

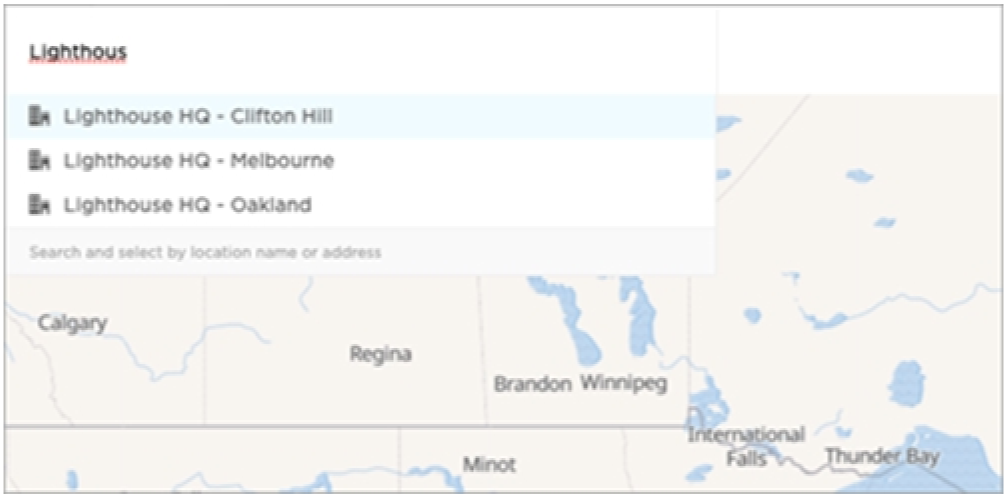
By default, the maps tab displays when you open Lighthouse Web. The activity displayed on the map refreshes every 30 minutes. For a complete activity view, use the reporting feature.



Note: Only online employees and forms submitted within the last 30 minutes display on the map.

Location Search Bar

The Search bar is located at the top left of the map and it helps you quickly find locations. Recently viewed locations automatically display in the drop down. To find a location that is not in the list, type the name or address, in the Search field. Existing locations display a building icon next to them.



When you click on a location from the list, the map zooms into that location on the map. Locations that have previously been created in Lighthouse display a blue outline around the geo fence. Clicking on the map location displays the details for that location in a slide out view.

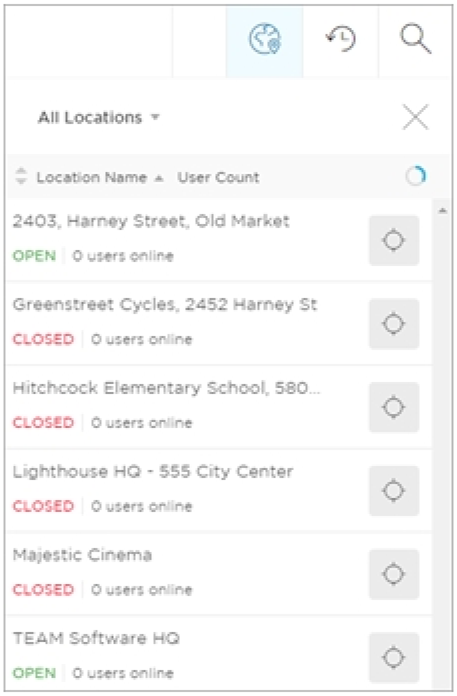
Tool Buttons

On the top right of the map are three tool buttons for managing locations, reviewing recent activity and searching.

Location

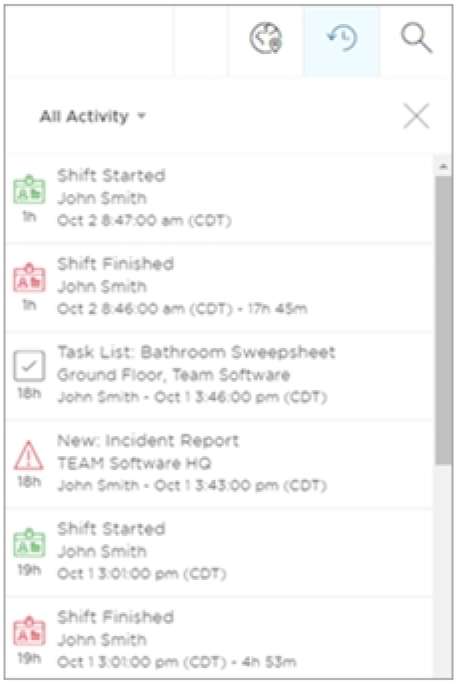
When the location tool button (pin on a world symbol) is clicked, it opens a location sidebar. This sidebar displays a list of the locations that are available in the application. To find the location on the map, click the Locator button next to the appropriate location. The location filter defaults to All Locations. You can filter the locations by the service hours status, (Open, Closed, Open/Active and Open/Inactive). To filter, click the All Locations heading and choosing the appropriate filter.

> **Tip:** For monitoring purposes the location filter is often set to Open/Inactive.



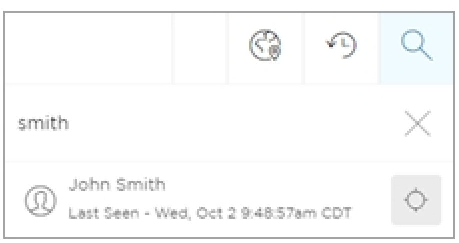
Activity

Use the activity tool button (rounded arrow) to view recent location activity. By default, the displayed items are in chronological order. When selected, some of the activities display a slide out view with additional details. If you have edit permissions, the edit button displays at the bottom of the slide out view. You may use this feature to edit, add photos, correct misspellings and complete a final review to the completed forms.



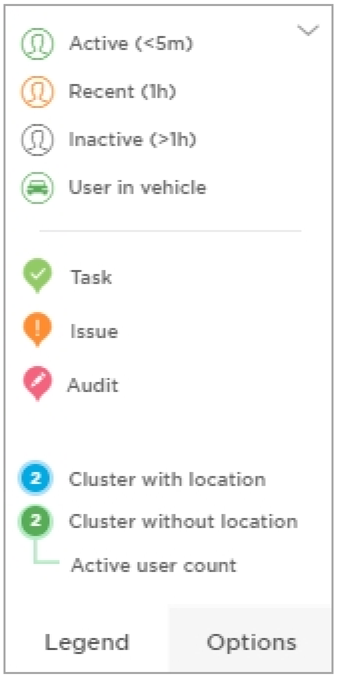
Search

The search tool button (magnifying glass) allows you to search for online employees, submitted form tasks, issues and audits (with activity in the last 30 minutes) on the map. Type the name of what you are searching for and click the locate button from the displayed list to locate the employee/item on the map.



Legend

The legend (located on the bottom left of the map) provides a helpful map key.

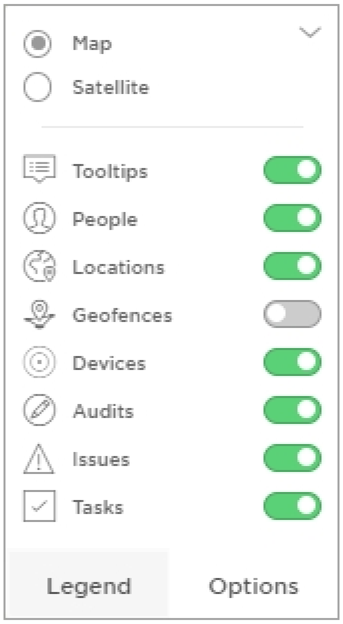


The color of the employee icons indicates how recently Lighthouse has received updated activity. Employee activity is based on submitting a form, scanning a QR code, beacon identification or simply based on employee movement. An employee needs to move a regular amount of distance for movement to be tracked. Submitted tasks and issues within 30 minutes are visible on the map.

At times the map view can look crowded with displaying locations, employees and submitted forms, so the map clusters group information together by proximity (region or location). Clicking on a cluster, reveals a summary of the information contained within. Blue clusters indicates there is a location in the cluster, and green clusters indicates that there is only employees and workflow.

Options

Options (located on the bottom left of the map) provide you a tool to customize what displays on the map. If the toggle is green, the map displays the item. When the option is gray the item is hidden from view.



Satellite - displays the map in a picture view

Tooltips - displays text details on the map

Tip: If tool tips are turned off you can click on an icon to display details

People - displays where active employees are located

Locations - displays location boundaries

Geofences - displays geofence boundaries

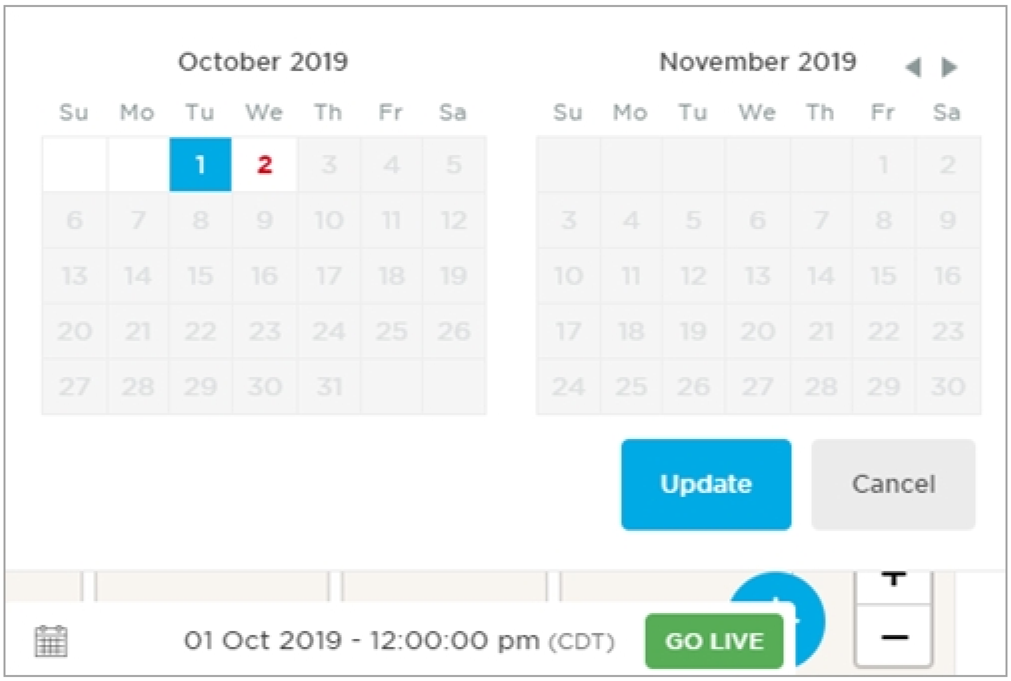
Devices - displays Bluetooth beacons or QR codes

Issues - displays recent submitted issue forms

Tasks - displays recent submitted task forms

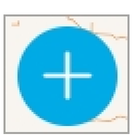
Viewing Current or Historical Time

The map default view displays the current date/time. You can view historical activity on the map by selecting the calendar icon (bottom of the map) and using the date picker to change the date. To change the time, slide the green time bar to the time you want to display. To return to the current day/time, click the Go Live button.

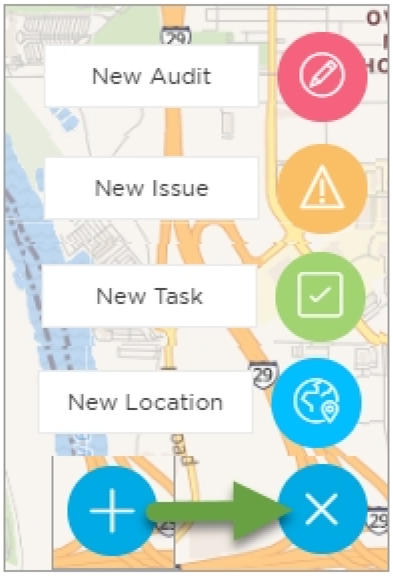


Add Buttons

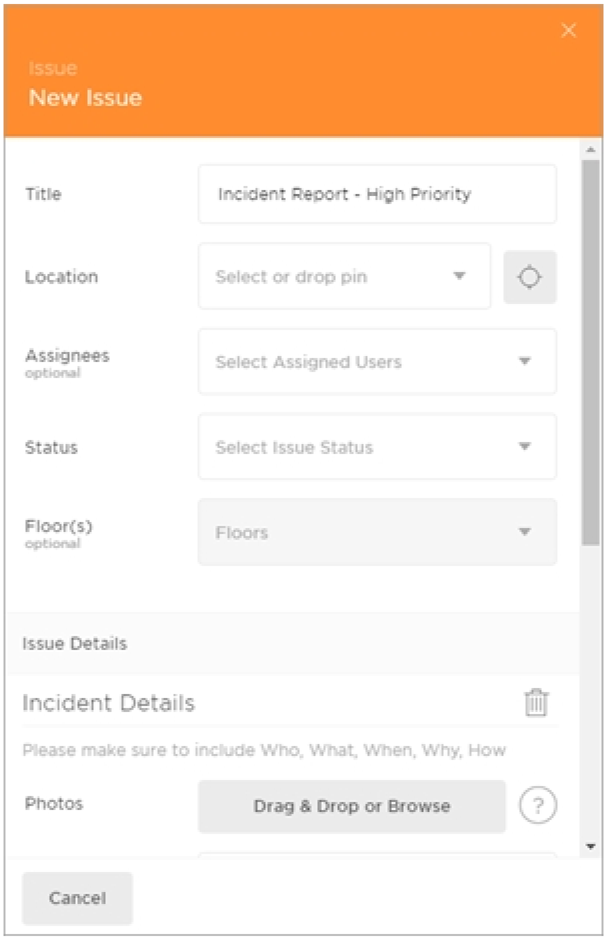
You can submit issues, tasks, audits and create locations in Lighthouse Web by using the add button (blue circle located on the bottom right corner) on the map view.



Click this button to view additional nested buttons. The pink button is used to creating audits, orange button for creating issues, green button for creating tasks, and the blue button is for setting up new locations.

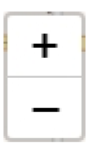


To submit an issue, task or audit, click the appropriate add button, select the template from the slide out view, and click the Next button. This opens the New Issue/Task/Audit view where you can complete the fields and save the form. You can use this web feature to help an employee log an issue, alarm or incident that they need to report.



Zoom Buttons

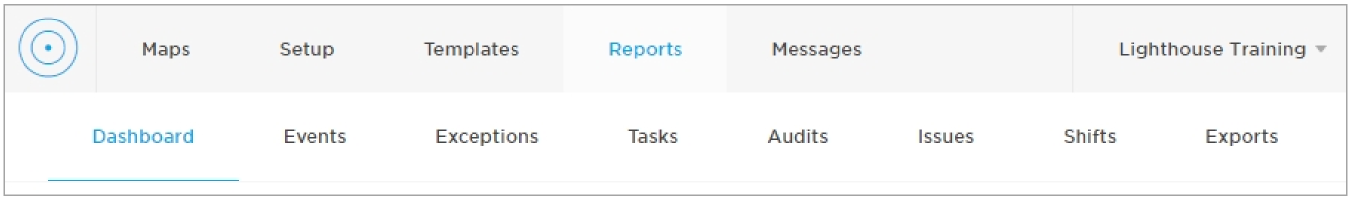
To zoom in or out on the map use the plus or minus symbol icons in the bottom right of the map.



Reports

All activity that is completed in the Lighthouse mobile app and in the maps web window is included in reports. The map provides a point-in-time visual representation of activity, whereas Lighthouse reports provide a complete view of all activity. If activity has not occurred within the last 30 minutes you will not see that activity on the map.

You access reports from the Reports main menu at the top of the window. The Dashboard tab displays by default.



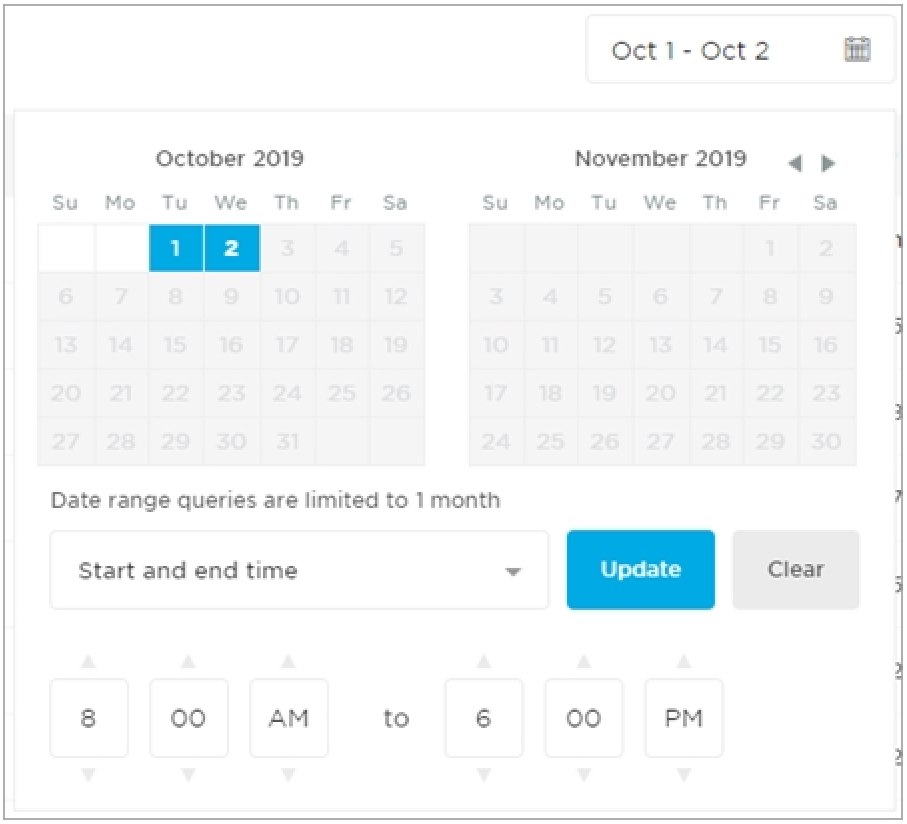
Use the tabs under the Reports heading to navigate to each different type of report.

- **Dashboard** - a visual representation of issues over time
- **Events** - GPS, Bluetooth beacon connects, and QR code scan activity
- **Exceptions** - exceeded loop time-limits activity
- **Tasks/Audits/Issues** - form activity
- **Shifts** - sign in/out activity
- **Exports** - information that has been exported

Date and Time Filters

Every report in Lighthouse can be filtered by date, date range and time of day. The Event report defaults to the current date while all others display the last week as default.

To change the date range for a report, use the date picker by clicking the calendar icon above the report information and selecting the day you want the report to start and the day you want it to finish, then click the Update button. Within a day, you can also specify a start and end time. There are limits on date ranges and history data that is available in Lighthouse. Contact TEAM Client Services if you need an export of report information that you cannot retrieve in Lighthouse.



Lighthouse Report Data

- **Events** - can export one month at a time, up to six months back
- **Exceptions** - can export three months at a time, up to three months back
- **Forms** - can export three months at a time, up to 12 months back
- **Shifts** - can export three months at a time

Note: Lighthouse stores history information up to seven years back. If you need report data outside of the above listed limits contact TEAM Client Services.

Additional Filters

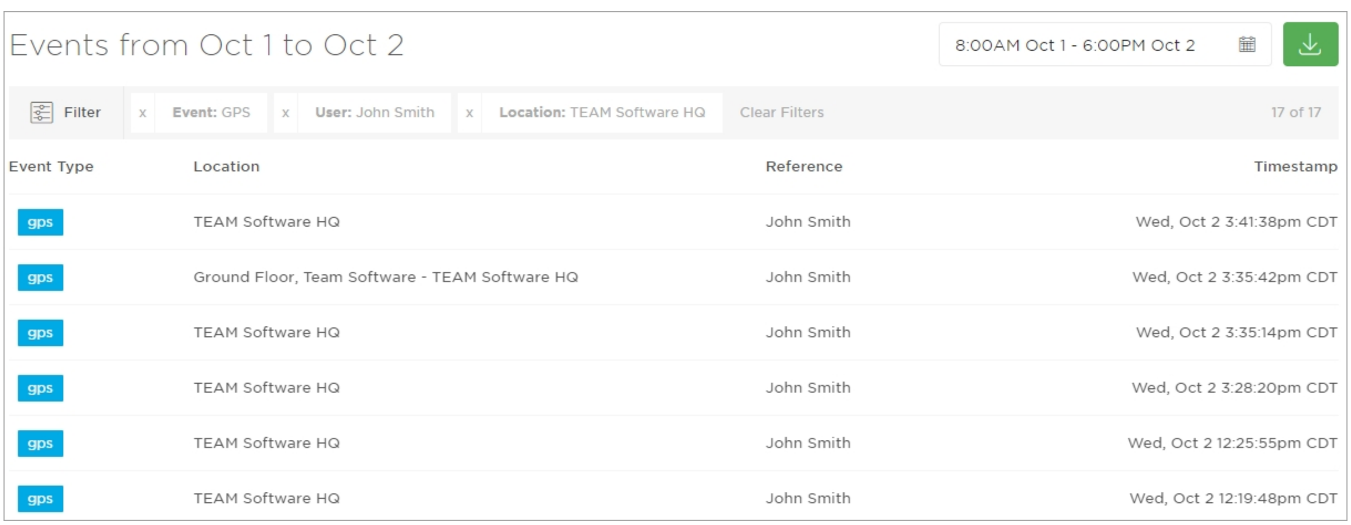
To filter on additional information, use the Filter button located at the top left of the report.

Within each report type, additional filters are available.

- **Events** - Event (GPS, Enter, Exit), Location, User, Zone
- **Exceptions** - Location, Zone
- **Tasks** - Location, Task (form templates), User, Zone
- **Audits** - Location, Audit (form templates), User
- **Issues** - Location, Issue (form templates), Status, User
- **Shifts** - Location, Role, User

You can add multiple filters at the same time by clicking the filter button again.

To clear individual filters click the X next to the filter, and to clear all filters use the Clear Filters button on the header.


Events from Oct 1 to Oct 2

8:00AM Oct 1 - 6:00PM Oct 2

Filter x Event: GPS x User: John Smith x Location: TEAM Software HQ Clear Filters 17 of 17

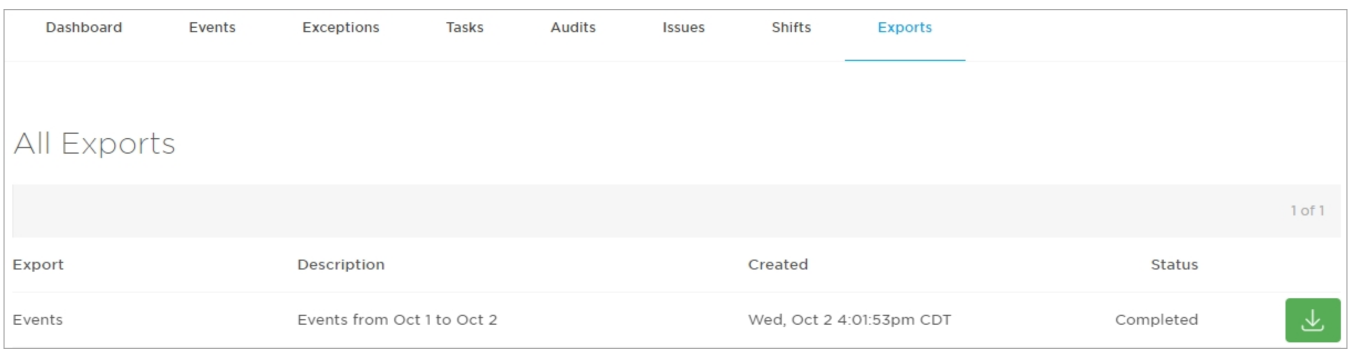
Event Type	Location	Reference	Timestamp
gps	TEAM Software HQ	John Smith	Wed, Oct 2 3:41:38pm CDT
gps	Ground Floor, Team Software - TEAM Software HQ	John Smith	Wed, Oct 2 3:35:42pm CDT
gps	TEAM Software HQ	John Smith	Wed, Oct 2 3:35:14pm CDT
gps	TEAM Software HQ	John Smith	Wed, Oct 2 3:28:20pm CDT
gps	TEAM Software HQ	John Smith	Wed, Oct 2 12:25:55pm CDT
gps	TEAM Software HQ	John Smith	Wed, Oct 2 12:19:48pm CDT

Export and Download

You can download and export all reports to an Excel format. To export a report click the download button located above the report and click the Confirm button.

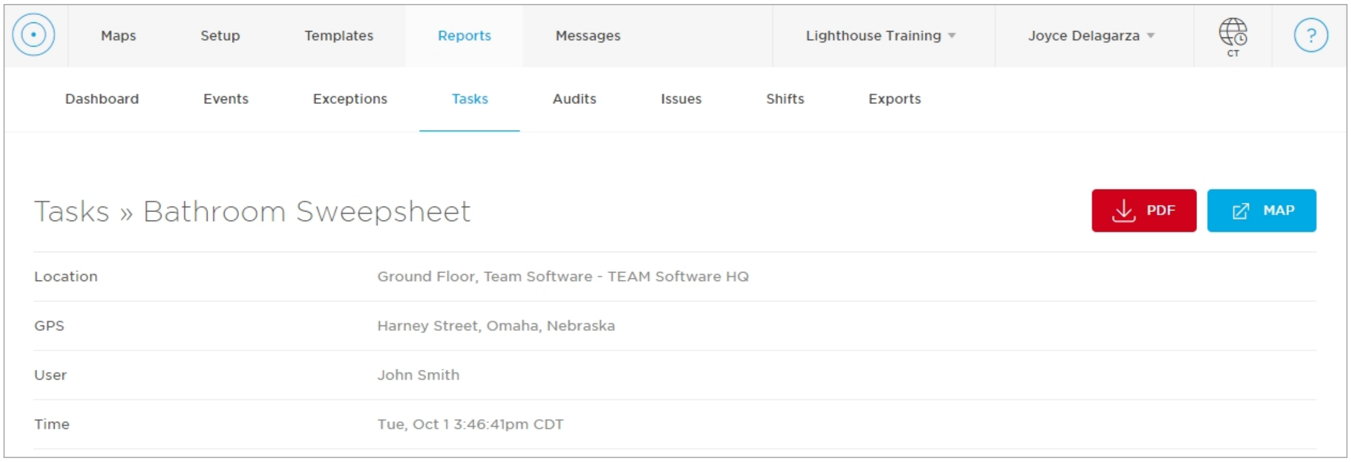
Once the export has completed its processing, the report is available to download on the Exports tab. Some of the reports display details on separate worksheet tabs.

Note: For large data sets, it may take some time before the export is available.



Tasks, issues and audits can download to a PDF format. This feature allows for reports to be distributed while protecting the integrity of the information contained within the report.

To download the report to a PDF, click the form to open up the details and click the PDF button located above the report. You can also click the Map button to see on the map where the form was completed. On the map it opens the slider view which gives you immediate access to make any edits to the form by clicking the Edit button.



Tip: A company logo can be displayed on the top area of reports when they are generated. To add this feature, contact TEAM Client Services.