

Manage Users

The **USERS** tab records anyone who needs to log in and access your account. This includes field service workers, technicians, mechanics, laborers, craftsman, or contractors to whom you assign an appointment, and will be working the job on their mobile devices. This list also includes the back office personnel who dispatch, track and invoice, or access reports and account data.

Registered users are active and archived users of your account. Modify users as your staff changes due to company growth and attrition. Several of the user settings choices will affect mobile devices, use of the mobile application, roles & rights, crews, and labor rates.

Manage users from the **REGISTERED** tab and **User Record** to accomplish the following actions:

- Monitor the **Users List** for mobile user device, application version, and other details.
- Modify **User Record** quickly and easily.
- Archive or Unarchive users to maintain work history when user is no longer employed or to reactivate seasonal users.
- Administer timesheets for individual and multiple users.

To manage users on your account requires 'Enable User Update', 'Enable User View', 'Enable User List', and 'Enable User Archive' in either 'Role or User Roles & Rights' security settings.

In order to manage multiple user timesheets also check the 'Enable Multiple Timesheets' right.

Monitor the Users List

USERS tab → **REGISTERED** sub tab → **Users List**

The screenshot shows the 'Users' list interface. At the top, there are navigation tabs: JOBS & QUOTES, CUSTOMERS, TASKS, ITEMS, ASSETS, INVOICES, **USERS**, REPORTS, and NOTIFICATIONS. Below these, there are sub-tabs: REGISTERED (selected), UNREGISTERED, and NEW USER. The main content area is titled 'Users' and includes a 'Save This View' button and a 'Filter' button. There are also buttons for 'Export Timesheet to CSV' and 'Export Timesheet to PDF'. A table of users is displayed with columns: Email, Group, User Settings, Joined, Work Start, Work Finish, OS Name, and OS Version. A 'Display Grid Columns' dropdown menu is open, showing a list of columns with checkboxes: Name, Device, Email, Group, User Settings, Joined, Work Start, Work Finish, Archived, Archived at, OS Name, OS Version, Device Model, and App Version. The 'OS Version' column for the last user is highlighted as '1.18.0.32'.

	Email	Group	User Settings	Joined	Work Start	Work Finish	OS Name	OS Version
ist ipad	ptheriot@serviceco.com	Admin	No	Fri 1/25/13	9:00 AM	11:00 PM	iOS	8
andro's	avielma@serviceco.com	Admin	No	Fri 1/25/13	9:00 AM	5:00 PM	iOS	8
ndy's s	amurphy@serviceco.com	Admin	No	Fri 1/25/13	8:00 AM	5:00 PM	iOS	8
e	user12@servicco.com	Employee	No	Sun 3/10/13	9:00 AM	5:00 PM	No Device	No Devis
e	user8@servicco.com	Employee	No	Sun 3/10/13	9:00 AM	5:00 PM	No Device	No Devis
oniahubert	ahubert@serviceco.com	Manager	No	Wed 1/7/15	9:00 AM	5:00 PM	iOS	8
Phone M-1	user5@servicco.com	Employee	No	Sun 3/10/13	9:00 AM	5:00 PM	iOS	1.18.0.32

Quickly and easily view a user's device, email or group (role) using the display Grid Columns feature on the Users List. Simply checkmark the box preceding the desired column and it will be immediately added to your grid view. Do not see an option you would like to track on a user? Consider adding a User Custom field in settings.

The screenshot shows the bottom of the Users List interface. It displays '1 - 25 of 69 results' and pagination controls: '10 | 25 | 50 | 100'. A 'Show archived' checkbox is highlighted with an orange box.

A unique feature on the **Users List** is the ability to display or hide archived users. An archived user is a user who has worked a job or quote on your account, but is no longer employed. Archive the user to preserve and maintain the work history on the account. Examples of archived users include former employees or seasonal workers.

Select the checkbox located at the bottom of the Users List to show the archived users. Unselect to hide the archived users from the list. Archived Users can easily be un-archived on the **User Record**.

Manage User Record

USERS tab → **REGISTERED** sub tab → **Users List** → **[Select User]**

Action Area	Description
View Recent Jobs	View the five (5) most recent jobs for the user, click the job/quote number, or view to quick link to the job record. Select view all to view all users' jobs on the Jobs List, see the Latest activity, status of the job, or quickly access the staff (technician) assigned to the job.
View Recent Invoices	View the five (5) most recent invoices for the user by Invoice ID, Job ID, Customer Name, Price, and Created day/date. Directly quick link to an invoice record from the invoice ID or by selecting view . Select view all to view all invoices for the customer.
View User Rights accordion	Select the down arrow to expand the accordion and view the rights and permissions enabled for this individual user.
View Default Crews accordion	Select the down arrow to expand the accordion and view the default crews assigned to this individual user.

Action Area	Description
View User Details	View user details including the following: <ul style="list-style-type: none"> • Joined – Day, date and time the user activated their status • Email – User’s email (unchangeable once created) • Tel Number – Phone or cell number for user • Device – Mobile device type (system updates from device information sent at sync) • Group (role) – The role selected for the user • Working Hours – The start and end times for the user. Working hours are required for all users for timesheets. Business hours are the default working hours • Last synced – The time period since the last sync such as 2 days, 15 hours and 53 minutes ago or 1 minute ago
View Labor Rate Type	View the labor rates enabled for this individual user. The default labor rate is labeled.
Edit	Select to edit the user record. Editing options include the following areas: <ul style="list-style-type: none"> • User fields – Modify fields with the exception of the email address • User Rights – Custom User Rights or User Rights of Role • Notifications – Select areas to view on NOTIFICATIONS tab • Labor Rates – Add Company Labor Rates or change default • Default Crews – View available crews the user is associated with You can Cancel edits any time before selecting the SAVE button.
Archive User button	Select to store an inactive user and their information plus any work history they have completed while active with the company
Timesheet button	Select to view the timesheet for the selected user by editable date range and working hours. Once a timesheet is created for the user print to a PDF or export to CSV the user’s timesheet

Archive or Unarchive Users

USERS tab → **REGISTERED** sub tab → **Users List** → **[Select User]** → **Archive User** button

Select the **Archive User** button to display an Archived Post Note on the User Record and Users List. The user will not have access to FieldAware.

USERS → **REGISTERED** tab → **Users List**

When Show Archived checkbox is selected, the archived users will display on the Users List with an Archived Post Note as in the example below.

	Name	Device	Email	Group	User Settings	Joined	Work Start	Work Finish	OS Name
<input type="checkbox"/>	Adrian Murphy Archived	No Device	adrian.murphy@epicrep	Admin	No	Fri 9/26/14	9:00 AM	5:00 PM	No Device
<input type="checkbox"/>	Aidan Hourigan	No Device	aidan.hourigan@epicrep	Admin	No	Fri 9/26/14	9:00 AM	5:00 PM	No Device
<input type="checkbox"/>	Alasdair McKenzie Archived	No Device	alsadair_mckenzie@yah	Manager	No	Wed 9/25/13	9:00 AM	5:00 PM	No Device

USERS tab → **REGISTERED** sub tab → **Users List** → **[Select User]** → **UNARCHIVE** button

Click on the Archived User Name to UNARCHIVE button on their User Record as in the example below. This will activate the user and they can now begin using FieldAware.

REGISTERED | **UNREGISTERED** | **NEW USER**

Alasdair McKenzie **Archived!**

EPIC Handy Repair

Recent Jobs [view all](#)

Job ID	Staff assigned	Latest activity	Status	
J43	Alasdair McKenzie	Wed 9/25/13	active	view
J45	Alasdair McKenzie	Wed 9/25/13	completed	view

Recent Invoices [view all](#)

Invoice ID	Job ID	Customer	Price	Created
<ul style="list-style-type: none"> ▶ User Rights ▶ Default Crews 				

User Details

Joined: Wed 9/25/13 3:07 PM
 Archived: Thu 11/14/13 8:40 PM
 Email: alsadair_mckenzie@yahoo.co.uk
 Tel. Number: <>
 Device: No Device
 Group: Manager
 Working Hours: 9:00 AM - 5:00 PM
 Last Synced: never

Labor Rate Type

Standard - Default
 Overtime
 Holiday

UNARCHIVE

Timesheet

Administer Individual Timesheets

USERS → REGISTERED tab → Users List → [Select User] → Timesheet button

REGISTERED UNREGISTERED

Date Range: 2/24/2015 - 3/9/2015

Working Hours: 9:00 AM - 5:00 PM

Timesheet: [Dave Martens](#)

Tuesday, February 24, 2015

Start	End	Activity	Job	Customer	Duration
8:52 AM	9:52 AM	Job	J7105.41	Bob's Steak & Chop House_MR	0h 59m 10s
12:48 PM	2:36 PM	Job	J7106.40	Arboretum	1h 47m 40s

Standard Hours: 2h 40m
Overtime Hours: 0h 07m

Cancel
Print
Export

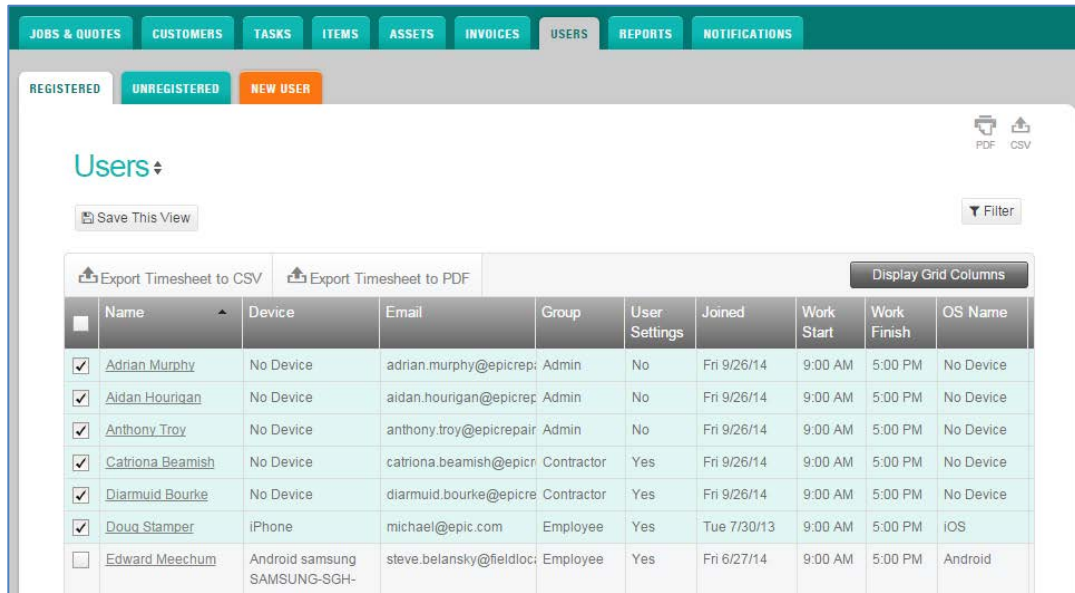
Action	Description
Set Date Range	Select dropdown arrow to view calendar. Easily arrow forward, back, and then click on day to select start and end date. The fields will default to today's date
Modify Working Hours	<p>Establish different working hours from the Working Hours set on the User Record that display and are the default. Use the dropdown arrow to custom select working hours. This is only a temporarily reset to user working hours for that particular individual timesheet and does not change the User Record.</p> <p>Working Hours display in the user's time zone and not the time zone of the user requesting the timesheet. A note will display when the time zones are different as in the example below. Notice the setting for user requesting the timesheet is a quick link.</p>
View Timesheet User Name	<p>Timesheet title with quick link to User Record</p> <p>Timesheet: Peter Russo</p>
Day Grid	<p>Display grid by day and date for the date range selected. The individual day grids contain the following columns:</p> <ul style="list-style-type: none"> Start – Beginning working time

Action	Description
	<ul style="list-style-type: none"> • End – Finished working time • Activity – Type of activity such as a Job or Quote • Job (or Quote) Number – Display the job or quote number with a quick link to job or quote record • Customer – Customer name with quick link to customer record • Duration – Log of duration in hours (h), minutes (m) and seconds (s)
Standard Hours	Recorded hours within the set or modified working hours of the user
Overtime Hours	Recorded hours outside the set or modified working hours of the user
Cancel	Select to stop activity on Timesheet and return to user record
Print	Select to send to a PDF to you browser's download folder. Click to open. User Name, timesheet period (date range) and working hours are display on top with each day, date, display day grid, total standard/overtime hours per day, and total standard/overtime hours per date range.
Export	Select to send to a CSV to you browser's download folder. Click to open. User First Name, Last Name, Email, Time zone, Date, Start, End, Activity, Job ID, Customer, Duration, and Start/Finish Working Hours display as in the example below

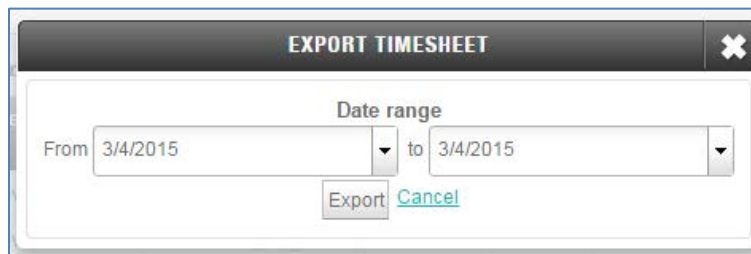
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	First Name	Last Name	Email	Timezone	Date	Start	End	Activity	Job ID	Customer	Duration	Working F	Working Hours F	
2	Dave	Martens	dmartens	US/Centra	2/24/2015	8:52 AM	9:52 AM	Job	J7105.41	Bob's Steak &	0:59	9:00 AM	5:00 PM	
3	Dave	Martens	dmartens	US/Centra	2/24/2015	12:48 PM	2:36 PM	Job	J7106.40	Arboretum	1:48	9:00 AM	5:00 PM	
4	Dave	Martens	dmartens	US/Centra	2/25/2015	9:35 AM	9:36 AM	Job	J7105.42	Bob's Steak &	0:00	9:00 AM	5:00 PM	
5	Dave	Martens	dmartens	US/Centra	2/26/2015	9:13 AM	11:19 AM	Job	J7105.43	Bob's Steak &	2:06	9:00 AM	5:00 PM	
6	Dave	Martens	dmartens	US/Centra	2/27/2015	8:36 AM	8:36 AM	Job	J7105.44	Bob's Steak &	0:00	9:00 AM	5:00 PM	
7	Dave	Martens	dmartens	US/Centra	3/2/2015	8:40 AM	8:41 AM	Job	J7105.45	Bob's Steak &	0:00	9:00 AM	5:00 PM	
8	Dave	Martens	dmartens	US/Centra	3/3/2015	9:34 AM	9:34 AM	Job	J7105.46	Bob's Steak &	0:00	9:00 AM	5:00 PM	
9	Dave	Martens	dmartens	US/Centra	3/3/2015	11:00 AM	2:16 PM	Job	J7106.45	Arboretum	3:15	9:00 AM	5:00 PM	
10	Dave	Martens	dmartens	US/Centra	3/4/2015	8:14 AM	8:14 AM	Job	J7105.47	Bob's Steak &	0:00	9:00 AM	5:00 PM	
11	Dave	Martens	dmartens	US/Centra	3/4/2015	12:05 PM	1:58 PM	Quote	Q536	Bill Smith	1:53	9:00 AM	5:00 PM	

Administer Multiple Timesheets

USERS tab → **REGISTERED** sub tab → **Users List**



Multi Action button	Description
Export Timesheet to CSV	Click on user checkbox or select all users displayed in view by clicking the top checkbox. Multiple user timesheets display in rows with header columns
Export Timesheet to PDF	Click on user checkbox or select all users displayed in view by clicking the top checkbox. Multiple user timesheets begin on separate pages



Select the dropdown arrow to modify the date range. **‘From’** is the beginning or start of the range and **‘to’** is the finish or end of the date range. The default is the current date for both the **‘From’** and **‘to’** dates. Select **Export** to send a CSV or PDF to your browser’s download folder or **Cancel** to exit this action.

Sample Export Timesheet to CSV

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	First Name	Last Name	Email	Timezone	Date	Start	End	Activity	Job ID	Customer	Duration	Working H	Working Hours	Finish
2	Doug	Stamper	michael@US/Centra		12/1/2014	11:24 AM	1:33 PM	Travel	J18	Kimbell M	2:08	9:00 AM	5:00 PM	
3	Edward	Meechum	steve.bel@US/Centra		8/7/2014	11:05 AM	11:15 AM	Job	J121	Walmart	0:10	9:00 AM	5:00 PM	
4	Edward	Meechum	steve.bel@US/Centra		8/17/2014	6:45 AM	6:52 AM	Job	J50	American	0:07	9:00 AM	5:00 PM	
5	Edward	Meechum	steve.bel@US/Centra		8/17/2014	7:05 AM	11:59 PM	Travel	J50	American	16:55	9:00 AM	5:00 PM	
6	Edward	Meechum	steve.bel@US/Centra		8/18/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
7	Edward	Meechum	steve.bel@US/Centra		8/19/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
8	Edward	Meechum	steve.bel@US/Centra		8/20/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
9	Edward	Meechum	steve.bel@US/Centra		8/21/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
10	Edward	Meechum	steve.bel@US/Centra		8/22/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
11	Edward	Meechum	steve.bel@US/Centra		8/23/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
12	Edward	Meechum	steve.bel@US/Centra		8/24/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
13	Edward	Meechum	steve.bel@US/Centra		8/25/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
14	Edward	Meechum	steve.bel@US/Centra		8/26/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
15	Edward	Meechum	steve.bel@US/Centra		8/27/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
16	Edward	Meechum	steve.bel@US/Centra		8/28/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
17	Edward	Meechum	steve.bel@US/Centra		8/29/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
18	Edward	Meechum	steve.bel@US/Centra		8/30/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
19	Edward	Meechum	steve.bel@US/Centra		8/31/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
20	Edward	Meechum	steve.bel@US/Centra		9/1/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
21	Edward	Meechum	steve.bel@US/Centra		9/2/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	
22	Edward	Meechum	steve.bel@US/Centra		9/3/2014	12:00 AM	11:59 PM	Travel	J50	American	24:00:00	9:00 AM	5:00 PM	

Sample Export Timesheet to PDF

Adrian Murphy

Timesheet period:
Mar 4, 2014 - Mar 4, 2015
9:00 AM - 5:00 PM

Note: All times are shown in Adrian Murphy 's timezone, America/Chicago. Your local timezone is US/Central.

Tuesday, March 4, 2014

No work this day.

Wednesday, March 5, 2014

No work this day.

Thursday, March 6, 2014

No work this day.

Friday, March 7, 2014

No work this day.

Tips and Techniques

Consider the following tips and techniques as you manage users:

- All accounts will display an uncharged user named, faadmin Internal Admin, worked by FieldAware support representatives. This user is to provide assistance both in setup and troubleshooting customer accounts.
- Labor rates must be defined in **settings | COMPANY | Labor Details**. Once the labor rates are defined, the labor rates are then available to be associated to the individual users.
- Unlimited User Custom fields are available to define in **settings | CUSTOM FIELDS | Users**
- 'User Rights' can be either standard with the role or custom to the individual user.
- Custom User permissions will override group role settings when activated in User Rights.
- A user will display on the **Users List** once they have activated status by confirming a link in an email.
- New users will become 'unregistered user' until activation link selected
- Archive users to maintain work history when the user is no longer employed by the company.
- Default Crews can only be set in **settings | COMPANY | Default Crews**
- Print or Export individual timesheets from the **User Record**
- Print or Export multiple timesheets from the **Users List**
- Timesheets display in the time zone of the user not the time zone of the user requesting the timesheet.
- Time zone differences are displayed in a 'Note' at the top of the page

Summary Activity

Manage users from the Users List and from individual User Records. You can archive and unarchive users as your staff changes due to company growth, attrition, and seasonal workers. Since the email address is used to login for both the web and mobile applications, it cannot be changed or reused once activated and linked to FieldAware.

Activity 1: Manage **Users List**

- Step 1. Select to display Group (Role) column on your Users List
- Step 2. Sort the column to display in alphabetical order showing the Admin, Contractor, Dispatcher, Employee and Manager users grouped by role
- Step 3. Select checkbox to **Show archived** users
- Step 4. Save a view with archived users
- Step 5. Save a view with unarchived users

Activity 2: Manage **User Record**

- Step 1. Select a user to view their **User Record**
- Step 2. Click on [view all](#) in either Jobs or Invoices
- Step 3. What is the difference between the two [view all](#) options?
- Step 4. Archive a user
- Step 5. View the archive status on the **Users List**
- Step 6. View the User Rights
- Step 7. Select **EDIT** and change from role rights to custom user rights
- Step 8. What field cannot be changed on a **User Record**?

Activity 3: Manage Individual Timesheet

- Step 1. Select a user to view their **User Record**
- Step 2. Set a one (1) week timeframe (date range)
- Step 3. Expand and collapse the working hours
- Step 4. View the changes to the Standard and Overtime Hours
- Step 5. Export the timesheet to a CSV or a PDF

Activity 4: Manage Multiple Timesheets

- Step 1. Select two (2) or three (3) users on the **Users List**
- Step 2. Select the multi action button to export to CSV
- Step 3. Set date range to one (1) month and Export to view the file
- Step 4. Select two (2) or three (3) different users on the Users List
- Step 5. Select the multi action button to export to PDF
- Step 6. Set date range to one (1) month and Export to view the file
- Step 7. What is the most important difference between the files?