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## **Getting Started Guide**

**Welcome to etrace**

etrace® is a location-intelligent, wireless and web-based solution that runs on application-enabled mobile devices, enabling you to measure, manage, and optimize field service operations at the point of delivery. By providing a real-time connection between your field operation and back office, etrace enables your workforce to be more productive, your processes more efficient and your company to deliver superior service.

## **Getting Started Guide Overview**

This guide contains the information necessary to install and activate etrace mobile telephones and begin utilizing the functionality and benefits of etrace software. Included are step-by-step instructions for installing and setting up etrace on mobile phones, accessing e-learning training, tips for training your staff and daily procedures.

etrace is designed to be easily incorporated into your business with very little disruption or training. Xora recommends you train a staff member to be the etrace expert. This person should be equipped with the proper tools and knowledge to train the rest of your organization.

### **Summary of Steps for Deploying etrace:**

#### **Step 1 – Install Phone Software**

Load and install Phone software on users phones.

#### **Step 2 – Deploy Phones to Users**

Distribute phones and train users.

#### **Step 3 – Take Web Training Courses**

Take the Phone and Mission Control Administration and Operations course to learn the functionality of the software.

## Step 1 – Install Phone software

Follow the instructions to download the etrace software to your device. Make sure to follow the instructions for the type of device you're installing.

### Downloading and installing etrace

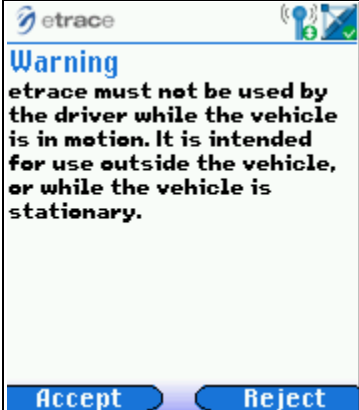
#### ***RIM Blackberry***

1. Enter the following URL into the Internet or WAP browser, click Ok  
AT&T RIM  
<http://support.etrace.com/deploy/etrace/att/8310/download.htm>
2. Select "Install etrace"
3. Select "Download"
4. Select Yes to Replace version
5. Application will download, progress bar will appear and complete
6. Select "Ok" to ok that the app was successfully installed, or press "run" to run that app
7. Run the app
8. Enter Phone number, press **Activate** button (1st time only)\*
9. ou will be prompted to **Enter Pin to log in**
10. Enter PIN Number, press Login button

\* The 1<sup>st</sup> time you use etrace, the application will use the device's phone number to automatically activate and sync your device with the Mission Control web portal. The application will also log you in upon activation.


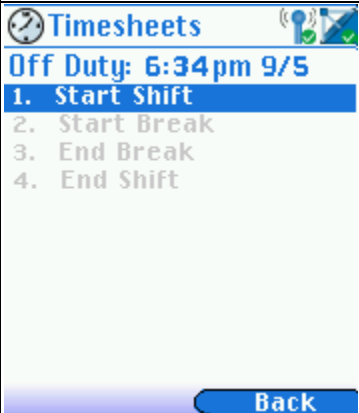
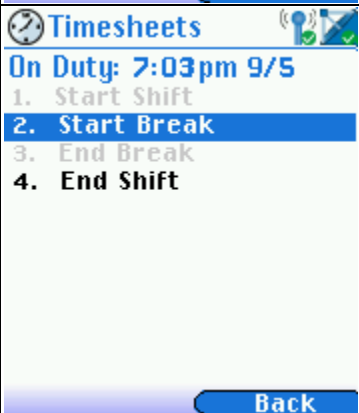
## Step 2 – Deploy Phones to Users


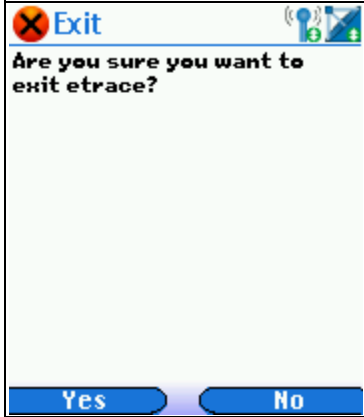
The best way to start learning about the system is to start collecting data in the fields. Deploying phones to users involves several steps. In your Getting Started email you will have received phone number and pin numbers for each of your mobile workers. Keep this information handy during first time setup. We suggest training the mobile workers on the daily procedures prior to deploying the phone to the field

Users will begin at the phone main screen. To start etrace, select the application icon from the main menu	
From the Java Apps menu, scroll down to etrace and press the Run button.	
	The first time a user logs into the application the application will automatically activate the device using the phone number of the application. The application will log the device into the linked user for the device or prompt the user to enter their pin number.
	The first time a user logs into the application they will be prompted Accept the etrace warning. After they press the Accept button they will go to the main menu.  If users decline the warning the application will exit and the device's application memory will be cleared and the user will be prompted for their pin number the next time the application is started.

## Daily Phone Procedures

Following is a step-by-step illustration of how a mobile worker typically uses etrace. The Daily Phone Procedures section can be given to employees for training purposes.

<p>Users will begin at the phone main screen. To start etrace, press the Java shortcut key. If they do not have a shortcut key setup for Java, press the Menu button, scroll to Java Apps, and press Select.</p>	
<p>From the Java Apps menu, scroll down to etrace and press the Run button. The application will auto login and go to the main menu.</p>	
	<p>After accepting the warning screen users will be taken to the etrace main menu. From there they can access their jobs, forms, locations, messages, and timecards.</p>
	<p>To "punch-in" to their timesheet, select the Timesheet choice from the etrace main menu. From the Timesheets menu press Select while Start Shift is highlighted. Next, users can either return to etrace main menu, or suspend etrace and return to the main screen to make and receive phone calls.</p>
	<p>After resuming etrace, users are returned to the last screen they were at before suspending the program. If they need to perform an action such as starting or ending a break, they can do so before suspending etrace again by pressing the Red Phone key.</p>

	<p>At the end of the day, users can choose End Shift in the timesheets menu. After they have ended their shift, they can return to the etrace main menu, then choose Exit.</p>
	<p>Before completely exiting etrace, users are prompted to confirm they wish to exit etrace, which they will need to accept by choosing Yes.</p>
<p>etrace is now completely exited.</p>	

## Training Tips and Reminders for the etrace Administrator or Trainer

- The proper usage of the etrace phone will provide useful reporting and mapping. By following the steps outlined in the training, you will be able to properly train your mobile workforce.
- It is required that your workers charge their phones properly. A full charged battery will give you roughly 6 to 8 hours of phone and etrace usage.
- It is required that your workers power cycle their phones once a day, preferably at the end of day after exiting etrace.
- Never select EXIT from the Resume screen. This shuts etrace down and affects mapping and reporting functionality.
- Proper phone usage will provide this data in the Activity Log of a Worker's detail page in Mission Control:

05/12/04 03:56 AM		Session	Login
05/12/04 04:09 AM		Timesheets	Start Shift
05/12/04 12:53 PM		Timesheets	End Shift
05/12/04 12:53 PM		Session	Exit etrace

- Allow for a ramp-up period for your mobile workforce to get use to using the new system.
- Dedicate some time to organize your thoughts around the discussion you will have with your employees to introduce this project. Focus on the business benefits and new opportunities this technology presents to the business and to each individual. It is not uncommon for employees to be wary of this technology since it involves the tracking of their activities. They will want to understand how you intend to use this information, so be prepared to discuss your strategy.
- Key points to emphasize:
  - Automated timecards
  - Employee accountability
  - Status tracking
  - Driving Directions

## Getting Started Guide

- Safety
  - Routing efficiency
  - Reducing phone calls
  - Utilization reports
- 
- Become an expert at using the phone application yourself. Before training your employees, take a few days to use the phones and practice different “what if” scenarios (i.e. low battery, forgot PIN, etc.) so that you can share your experiences with your employees. This will help you troubleshoot any issues and allow you to share simple “tips and tricks” that you pick up while learning yourself.
  - Appoint a few “project leaders” among the mobile workers to help support your efforts. Providing your mobile workers with a peer support group will help people be receptive to the technology. You may want to consider having your project leaders use the application for a few days before training the entire team.
  - Provide phone training as part of a regular team meeting to minimize your employee’s time away from work.
  - Spend plenty of time explaining the benefits that this project will have on your business (as discussed above). Set the proper expectations that using this technology is now a standard part of their job.
  - Provide each employee with a print out of the training material and a sticker on their phone for the PIN number. You may want to consider having the training sheet laminated so that they can keep in their vehicles for future reference.
  - Log into Mission Control every morning for the first few weeks to make sure that each mobile worker is using their phones properly. Spending a few minutes each day to remind those who may forget to start etrace on their phones will instill a usage pattern that will save you time and frustration later on.

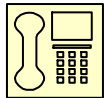
## Training Overview

### **To access courses:**

1. Login to etrace - [www.etrace.com](http://www.etrace.com).
2. Enter your username, password and company ID.
3. Click on the Training tab in the upper right corner of the screen.
4. Choose which course you would like to take by clicking on the "Click to Start" Action to the right of the course title. (You can click on the course title to view a course description)
5. To return to etrace at anytime, close the course window or minimize it.

## Customer Support

Our Product Support Specialists can be reached at the telephone numbers and email address listed below during the hours of 7AM to 7PM Central Standard Time.



### Contact Information

Customer Support: **1-877-449-7877**



Support email address – [customercare@xora.com](mailto:customercare@xora.com)

### Support Portal

Xora has assembled several resources in our Support Portal that are designed to help you find the answers you need to make the most of your etrace applications. The Support Portal can be accessed at <http://support.etrace.com>

## Quick Reference Card for etrace Phone Users

### Navigation & Buttons

**Back button** – previous screen

**Select button** – will select the highlighted option from list

**Menu button** – etrace main menu

**Trackball** – scroll vertically through list

**Numbers** – navigate to an item by pressing its corresponding number

**Red Phone button** – temporarily suspends etrace

**Green Phone button** – used for placing phone calls

### Launching etrace: (Default method)

1. Turn phone on.
2. Press Menu from the READY screen.
3. Select etrace
4. Enter PIN number and select **OK**.
5. Press **Accept** when the Safety Warning message appears.
6. The etrace main menu will be displayed.

### etrace Menu

#### Functions

**Starting and ending a shift** - From the main menu (MENU key)

1. Highlight **Timesheets** and press Select.
2. Highlight **Start Shift** and press Select. Then press the RED button.
3. To end a shift select JAVA then select Resume.
4. Highlight **End Shift** and press Select.

**Starting and ending a break**

1. Select Java then Resume.
2. Highlight **Start Break** and press Select.
3. When break is done highlight End **Break** and press Select. Press the RED button twice.

**Answering and making phone calls**

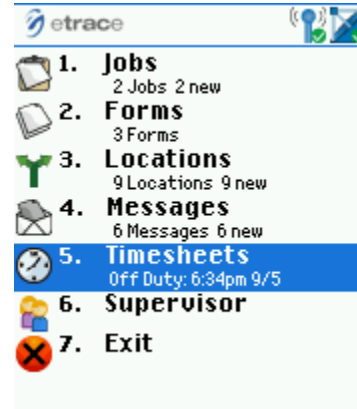
1. To answer a call - Press the Green phone button. etrace is automatically suspended. Resume etrace when you are done.
  2. To make a call - Press the Red phone button twice to suspend etrace. Dial the number and press the GREEN phone button to place the call. Resume etrace when you are done.
  3. To resume etrace – select the Resume option from the bottom right corner of the READY screen.
- NOTE: Sprint phones cannot suspend the application

### Logging out of etrace

From the Main Menu (MENU key) select EXIT and then Yes.

### Tips

- Charging the battery – you should charge your phone every night from an electric charger. The battery should last 6-8 hours with normal use. You can use a car charger during the day.
- Turning the phone off and restarting the phone at least once a day is recommended.
- Never select Exit from the Resume screen. This unexpected and harmful shutdown of etrace will affect mapping and reporting.
- Mandatory Safety Guidelines – *never interact with etrace while driving. Park the vehicle before using.*
- You should start etrace when you begin your day and exit at the end of the day. Etrace needs to be running on the phone to receive job dispatches. Always return to etrace after talking on the phone or using other phone screens.
- Do not turn off the phone while etrace is running. It may cause errors.
- Forgot your PIN? Contact your dispatcher.



## RIM (Blackberry)

### Verify the year setting

- Scroll to Options and click track wheel
- Scroll to Date/Time and click track wheel
  - Verify the correct year

### Verify Line 1 setting

- Scroll to Options and click track wheel
- Scroll to SIM Card and click track wheel
  - Verify the phone number

### Verify public IP address

- Scroll to Options and click track wheel
- Scroll to Status and click track wheel
  - Verify IP address does NOT start with a 0, 10, or 11. Contact Nextel to obtain a public IP address.

### Set GPS to Unrestricted

- Scroll to Options and click track wheel
- Scroll to Location Based Services and click track wheel
- If necessary, enter GPS PIN. Contact Nextel if you do not know your GPS PIN.
- Highlight Privacy Setting and click track wheel
- Highlight Change Option and click track wheel
- Highlight Unrestricted and click track wheel

### Server Sync

- From within etrace, click \* # to sync your device with the server

### Reset etrace data

- At etrace login, enter 9 zeros (000000000)
  - This will clear all etrace data on the device
  - If auto-login is enabled, Reject the warning screen to access the login screen

### Reset etrace activation

- At etrace login, enter 9 threes (333333333)
  - This will clear all etrace data on the device as well as the device activation
  - If auto-login is enabled, Reject the warning screen to access the login screen

## Appendix E - Phone Troubleshooting

### **Phone number XXXXXXXXXX is already activated by another device**

- Login to Mission Control as an administrator
- From the Devices tab, check the box to the left of the device you are trying to activate
- Click Deactivate and click OK

### **Phone number XXXXXXXXXX has not been registered in Mission Control – please call your administrator.**

- Login to Mission Control as an administrator
- From the Devices tab, verify the device exists.

### **The phone is no longer registered to use etrace. Please restart etrace and register your phone number.**

- Reset etrace activation
- Login to Mission Control as an administrator
- From the Devices tab, check the box to the left of the device you are trying to activate
- Click Deactivate and click OK

### **Access to GPS is restricted. Please change privacy setting to enable GPS.**

- Set GPS to Unrestricted

### **Unhandled Exception**

- Power cycle the phone

### **Phone storage is full.**

- Delete any unneeded jobs, locations, and messages to free data storage space on your device.