



Computer Methods (a division of Physio Systems, Inc.)

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ActivitySuite.com Notifications Tutorial

Overview

The **Notifications** module is a management tool that sends email and/or SMS notifications to management and users for:

- Employee Work Reminder
- Employee Late (has not checked in) for Work
- Employee Arriving on Site (entering geo-perimeter)
- Employee Departing Site (leaving geo-perimeter)

The work notifications are keyed to the **ActivitySuite** scheduling module or to a schedule imported from a third-party application such as [WhenToWork](#).

The geo-perimeter notifications are initiated by GPS site hits or GPS tracking. There are three ways in which GPS locations are transmitted to the server:

- 1) Android application – works on any GPS-enabled Android mobile device. The Android app can be downloaded from our web site at <https://www.activitysuite.com/help/Resources.aspx>.
- 2) Windows application – desktop program that interfaces with the Garmin OEM USB GPS receiver. A link to the Garmin GPS receiver can be found at <https://www.activitysuite.com/help/Resources.aspx>.
- 3) Mobile Web Page – works from a browser on any GPS-enabled mobile device (iOS and Android). The mobile pages are available at <https://www.activitysuite.com/mobile/>.

User Profiles

A user's SMS phone number and email address is managed in each user's personal profile. The link to manage a profile is located in the upper right-hand corner of every screen.

To receive SMS notifications, users must register and validate their phone numbers. Edit the profile and enter the number of a phone capable of receiving SMS. After the form is updated, a button will appear to verify the SMS number. Click the button and an SMS verification screen will appear.





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Lieberman, Dave (dlieberman)			
Email:	dlieberman@computer-methods.com (To opt out of receiving emails, contact your administrator.)		
Street:	2600 Mocking Bird Ln		
City:	Tracy	State:	California
		Zip:	95377
Phone:	2098348022	Cell/SMS:	4082056736
		Fax:	
Race:		Weight:	
		Height:	
Hair:		Eyes:	
		<input type="button" value="Edit"/>	<input style="border: 2px solid red;" type="button" value="Verify SMS"/>
Terms of Service			

User's Profile with button to verify SMS number

SMS NUMBER VERIFICATION

Enter Code:

Wait several seconds for an SMS to be received on the phone. The SMS will contain a verification code that is valid for 15 minutes. Enter the code into the form and click **Submit**. The number is now verified and eligible to receive notifications.

Enabling and Configuration Notifications

The screenshot shows a web application's Admin menu. The 'Admin' button is at the top left. Below it is a list of menu items: Billing Information, Client Portal, Company, Database Tools, GPS, Parking, Resources, and Sites. The 'Company' item is selected, and a sub-menu is displayed to its right. This sub-menu contains: Alarms, Beats, Company Settings, Fleet Vehicles, Incident Types, Logins, Notifications, Phone List, and Users. The 'Notifications' item in the sub-menu is highlighted with a blue background and a red arrow pointing to it from the right.

Navigate to the **Notifications** screen from the **Admin > Company** menu.

Administrator permissions are required to enable or change settings on the **Notifications** screen.

The **Notifications** screen has a section for enabling and configuring notification options. A second section of the screen manages the list of users that will receive management notifications (by SMS and/or email). There are four types of notifications with checkboxes that activate the notification and provide delivery options. The types of notifications are described below:



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Notification Type	Description
On Duty Reminder	Sends a notice 20 minutes before an employee's shift begins
Late for Duty	Sends a notice if the employee has not submitted a GPS site hit within 20 minutes before scheduled start time
Arrived On Site	Sends a notice when an employee's GPS site hit is inside the geo-perimeter of a site (defined in the site's settings)
Departed Site	Sends a notice when an employee's GPS site hit is outside the geo-perimeter of the last site visited (defined in the site's settings)
Import Schedules from Excel	Determines if the ActivitySuite Scheduling module is used for determining an employee's work schedule (unchecked). Alternatively, schedules can be imported from a 3 rd party vendor via spreadsheet (see Importing Schedules section below)

Edit the options for the notifications by clicking the "Edit" link. The options for each notification are described below:

Notification Settings							
Enable	Instant	Description	User	Manager	SMS	Email	
<input type="checkbox"/>	<input type="checkbox"/>	On Duty Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Late For Duty	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Arrived On Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Departed Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit
<input checked="" type="checkbox"/> Import schedules from Excel (CSV) file							

Enabling and Managing Notification Options

Option	Description
Enable	Activates or deactivates the notification type
Instant	Determines if a notification is sent immediately (when the event occurs). Otherwise, notifications are sent at 15 minute intervals.
User	The notification will be sent to the employee
Manager	The notification will be sent to users on the management recipient list
SMS	The notification will be sent by SMS. Only users (management and officers) with verified SMS numbers can receive by this method. SMS numbers are managed on the individual user's profile page.
Email	The notification will be sent by email. The email address used for notifications is managed on the individual user's profile page. Users can request to "Opt Out" of receiving emails. Only administrators can check the "Opt Out" option on the Manage



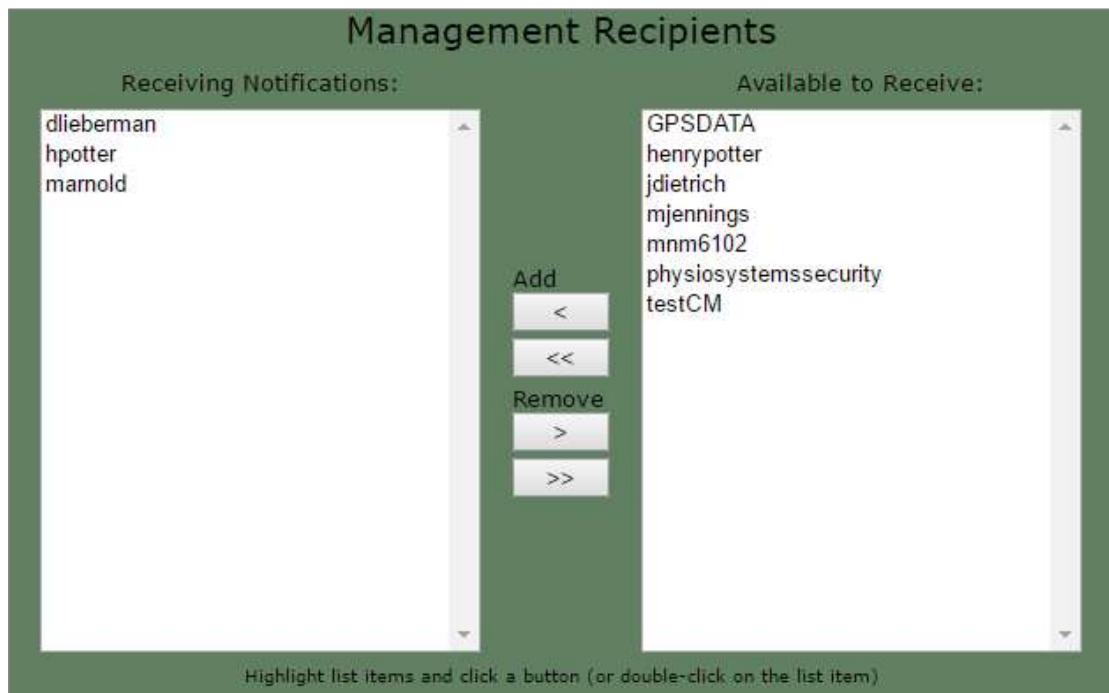
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Users screen at **Admin > Company > Users.**

Management Recipients

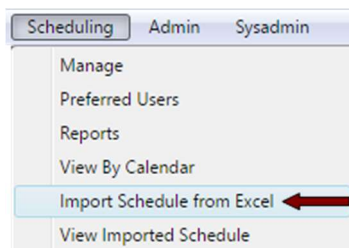
These lists manage the users designated to receive management notifications. Highlight a user in the "available" list and use the arrow buttons to move the user to the "receiving" list. Note that users without verified SMS numbers will not receive notifications by SMS. Users that have opted out of email will not receive notifications by email.



Recipients of Management Notifications

Importing Schedules

The notifications for employee work reminders and late to work are keyed to the ActivitySuite scheduling module. Alternatively, schedules can be managed directly from a spreadsheet or imported from 3rd party providers (such as WhenToWork). To enable the use of schedules from a spreadsheet, check the "Import Schedules from Excel (CSV) file" below **Notifications Settings**.



Navigate to the **Import Schedules** screen using the **Scheduling > Import Schedule from Excel** menu item. This item is located on the "Scheduling" menu so it can be accessed by employees with the **Scheduling** role.



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	A	B	C	D	E
1	SiteID	Date	Start Time	End Time	Username
2	OAK-002	4/10/2017	8:00 PM	2:00 AM	dsmith
3	LVR-050	4/10/2017	8:00 PM	2:00 AM	mjohns
4	SJC-100	4/10/2017	8:00 PM	2:00 AM	bgold
5	SFO-105	4/10/2017	8:00 PM	2:00 AM	hpotter
6	BUR-002	4/10/2017	8:00 PM	2:00 AM	mrose

This sample illustrates the format for a spreadsheet-based schedule. Virtually all 3rd party scheduling software is capable to exporting schedules with these columns. A scheduling program is not even needed – schedules can be managed directly from a spreadsheet program like Excel.

Five pieces of information must be provided for each work shift. The names in the “SiteID” column must exactly match names of SiteIDs existing in ActivitySuite. The same requirement holds for usernames. The date, start and end times must be local dates and times in a valid format.

The header row holds descriptions of the contents of a column. Third-party programs may export more than one header row. In some cases, there are no header rows – just data. In the example above, only one header row. The “Number of Header Rows” setting must equal the number of header rows in the file.

It does not matter which columns contain which items. But each setting in the import table must point to the appropriate column. For example, the SiteID is located in column “A” which is the first column. The import table setting for “SiteID Column” must be a 1.

Import Schedule From Third Party (Excel)	
Number of Header Rows:	1
SiteID Column:	1
Date Column:	2
Start Time Column:	3
End Time Column:	4
Username Column:	5
Schedule (CSV File) To Upload (100 Mb Limit):	<input type="text"/> <input type="button" value="Select"/>
<input type="button" value="Upload"/>	

Import table settings

Click the “Select” button and choose a CSV file with a schedule from the local computer. Then click the “Upload” button. The schedule will upload to the ActivitySuite server. The information will be processed and unrecognized sites or users will be rejected. The following screen shows two lists – the scheduling items that will be imported and those rejected.



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The screenshot shows a software interface with two main panels. The left panel, titled 'Preview of Data to Import', contains a list of items: 'SFO-105, 04/10/17 20:00, 04/11/17 02:00, hpotter'. The right panel, titled 'Rejected Items', contains a list of items: 'OAK-002, 04/10/17 20:00, 04/11/17 02:00, dsmith', 'LVR-050, 04/10/17 20:00, 04/11/17 02:00, mjohns', 'SJC-100, 04/10/17 20:00, 04/11/17 02:00, bgold', and 'BUR-002, 04/10/17 20:00, 04/11/17 02:00, mrose'. Below the panels, there is a note: 'Only items with verified SiteID and Username appear in the list.' and two buttons: 'Import' and 'Start Over'.

Item preview following upload of a schedule

In the example above, user "hpotter" at site SFO-105 is the only valid item in the list. The other sites and usernames are fictitious. Click import to accept the valid schedule items.

The screenshot shows a calendar titled 'My Schedule' for April 2017. The calendar has columns for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and rows for dates. The date April 15th is highlighted in orange and contains the text: 'SFO-105: SFO Airport 2000 - 0200'. The calendar also shows dates from March 26th to 31st and May 1st to 6th.

Harry Potter's Schedule

If the employee views his/her schedule from the **Field > Schedule** menu item, the work shifts imported from the spreadsheet will appear on their calendar.



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Example Use Case

In the following example, all notifications are sent by both SMS and Email. User "dlieberman" will receive management notifications. Scheduling is handled by the ActivitySuite Scheduling module. Notifications have been configured as follows:

- Employees receive an "on duty" reminder 20 minutes before their shift. The reminder is sent only to the employee.
- Managers receive a notification when the employee has not checked on the site within 20 minutes of the shift start.
- Managers receive a notification when the employee has pushed a GPS site hit arriving on site.
- Managers receive a notification when the employee has pushed a GPS site hit when leaving a site.

The screenshot shows the 'Notification Settings' window with a table of notification types and their configurations. Below the table is the 'Management Recipients' section, which includes two lists: 'Receiving Notifications' (containing 'dlieberman') and 'Available to Receive' (containing several user IDs). Navigation buttons for 'Add', 'Remove', and their respective multi-step versions are located between the two lists.

Enable	Instant	Description	User	Manager	SMS	Email	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	On Duty Reminder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Late For Duty	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Arrived On Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Departed Site	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit

Management Recipients:

- Receiving Notifications: dlieberman
- Available to Receive: GPSDATA, henrypotter, hpotter, jdietrich, mamold, mjennings, mnm6102, physiosystemssecurity, testCM

Settings for Example Use Case

The snapshot below illustrates hpotter's work assignment beginning at 18:15 on Sunday 4/16.

SFO-105: SFO Airport (Apr 16 to Apr 22)																									
	0000	0100	0200	0300	0400	0500	0600	0700	0800	0900	1000	1100	1200	1300	1400	1500	1600	1700	1800	1900	2000	2100	2200	2300	
Sun 04/16																									
Mon 04/17																									
Tue 04/18																									
Wed 04/19																									
Thu 04/20																									
Fri 04/21																									
Sat 04/22																									

Shift Assignment for User "hpotter"



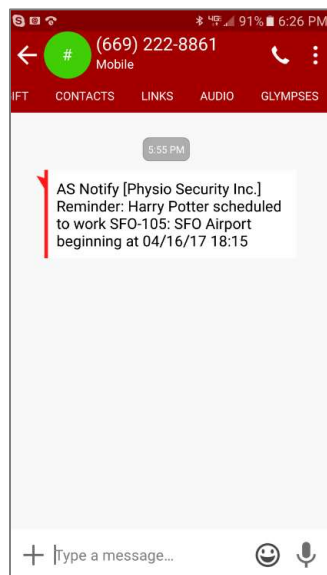
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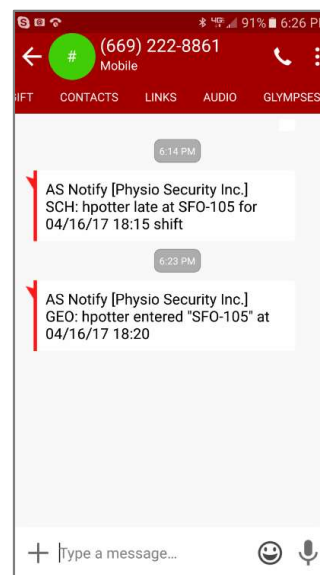
Based on the notification settings, the following event-sequence will take place:

- 1) A work reminder sent to the employee at 7:55 (20 minutes prior to shift)
- 2) A late for check-in notification sent to management at 8:15
- 3) A perimeter notification that employee is on site at 8:20.

Below are the screen snapshots of the SMS notifications that were received by the employee and management. Note – timestamps may differ slightly between server and mobile device clocks:



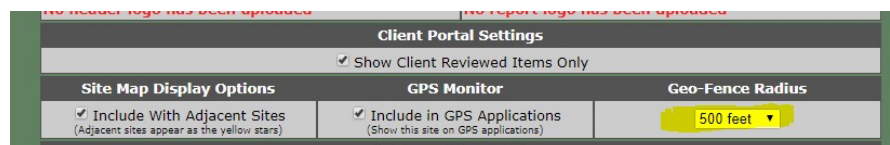
SMS received by hpotter



SMS received by dlieberman

Defining the Geo-Perimeter of a Site

Each site's settings screen has a dropdown list with a selection of perimeter values ranging from 100 feet to 5 miles. This provides more granular control over the GPS boundary of a site. Choose a small value for the Geo-Fencing radius to require the officer to send a site hit very close to the site's GPS location. Choose a larger value if the site spans a large territory.



Screen snapshot from editing a Site's Settings



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Summary

The ActivitySuite notification module is a powerful tool to track punctuality and movement of field officers. It enables management to respond swiftly to field issues and preserve integrity with clients.

There are many options available in this module. There may be some trial and error involved before converging on settings that work best within the organization.