

fissara**manage**

Fissara Manage (India) User Manual

Login into Fissara Web Application:

- 1. Type the Fissara Web Application link on your browser: https://fissaramanage.com/web/login
- 2. Enter the Admin credentials User Name, Password and Customer Reference. Click on "Login" button.

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	Login	-0					
		I forgot my password					

After successfully logged into the system, it will display the dashboard.

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Reset Password:

- 1. If you have forgotten your password, then click on "I forgot my password" link on Login page.
- 2. Next enter your username. And click on the "Reset Password" button.



3. A message "An email has been sent to your registered email account with instructions on how to proceed." will be displayed.



For technical support contact: support@fissaramanage.in

fissara manage

4. Check your registered email account for a **Password to rese**t request email from **Fissara Admin.**

Pas	sword reset request >	Inbox ×			Ð	2
Fissa to me	ra Admin <noreply@fissara.com> ▼</noreply@fissara.com>		11:45 AM (3 minutes ago)	☆	*	:
Dear I	Rahul Jadhav,					
We h	ave received new password request for y	your account 'rahulj'.				
If this can ig	request was not initiated by you, then pl nore this email and continue using your	lease report to your work supervisor IMN current password.	EDIATELY. If you accidently choose to reset the	e passwo	ord, you	u
If you http://	forgot your password and initiated a pat india.fissara.com/demo/pwdChange?uid	ssword change request, please click on f 1=rahuij&token=e0a309eb-61e3-43aa-a8	ollowing link and change your password: 178-219e5cf6ed4a			
Pleas	e note that this request is valid until Fri,	Dec 20, 2019 11:45.				
Rega Fissa	rds, ra Admin Team.					

5. Click on Password reset request link. It will redirect to the change password page. Then enter a new password and confirm password.

Please change	ahul Jadhav, your password.
Enter Password	
••••	
Confirm Password	
••••	
	Change Password

- Then click on "Change password" button to submit request. Note: This email link is valid for 24 Hrs only. Before 24 hr users need to reset the password.
- 7. It will display "Password changed successfully. You can log in to the application now." Message.



Password changed successfully. You can login to the application now.

Dashboard:

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To view Dashboard, click on "Dashboard" in left menu.

It will display a Summary for all completed jobs for today, Average Job Duration, No of Active Engineers on a daily basis. Progress is shown in Day Summary pie chart.

Reports:

To download Reports in excel format, click on "Reports" tab in left menu.

Multiple types of Reports can be downloaded from the system. Select the type of Report you want to download from the drop down menu.

<u>Activity Export:</u> If you select this type then you will get the CSV report for a particular date range.

 \circ It will display activity details like the start date and end date of the activity.

• Activity completed by the engineer.

o Site Name.

Activity Status.

<u>SLA By Sites:</u> If you select this type then you will get the CSV report for a particular date range.

• It will give information about the Site.

o Activity Id.Activity name.

o Job-status.

O Engineersname.

<u>SLA By Engineers:</u> If you select this type then you will get the CSV report for a particular date range.

• We can get the information about Engineers.

• It will export a report by an engineer's information.

o Activity Id.Activity name.

o Job-status.

O Engineersname.

<u>Pre-Task Report</u>: If you select this type then you will get the CSV report for all pre-job tasks.

- o Pre task id
- o Job id
- o Pre Job task name
- Notes
- o Status

Pre job Category

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Schedule Timeline:

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To view timeline chart for daily schedule, click on "Schedule" tab in left menu.

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team			« <	Page 1 of 0	> > 25	*								
Forms														

A new tab will open in browser displaying the timeline view:

Today		« < ·	19 Dec 2023 – 25 De	ec 2023 WK:51 > >	>		Day Week Full Week Month
	Tue 10	W1 20	Thu 21	54.00	C-+ 22	Sup 24	Mar 25
+	Tue 19	wed 20	Thu 21	PRI 22	Sat 25	5un 24	Mion 25
Alok Yadav							
Amol Yadav							
Dayanand Rahate							
Dipak Jadhav							
Mukesh Pawar	/AMC/ist/johies/////						
Pankaj Patil							
Rupesh Kadam							
Sachin Pawar							
Sandeep Pathak							
Sandip Pathak							
Siddesh Rane	Product Demo, eClerx	Sales Meeting, D Y Patil	Product Demo, D Y Patil				2 Activities, M G M
Vishal Nikam							

In this chart you can view live job status:

• Green colour: Job is scheduled for future date and assigned to Engineer / Technician.

🗈 fire extinguisher installation, 400002, Aaswad , D0011

O Green colour with lines: A Job is started and in-progress.



• Blue colour: Job completed successfully.

Product Demo, D Y Patil

O Light green colour: Travel time of Engineer.



Creating a Job from Schedule Timeline:

Schedule Timeline contains a region-wise graphical view of pending job, completed job, holidays, etc.

Here you can see the quicker look of scheduled jobs, work in progress job and completed job.

As well as you can create a job, Book Holiday, Book Non-Duty Activity (for example:- Meeting,

Sick leave, Maternity Leave, etc.).

You can filter this timeline by day wise, week wise, month-wise also by click on Work Day, Week, Month, button.

Today						4	(< 9	Feb 2	2019	> >>									Work D	ay Da	y We	ek Fu	ll Week	Mont
	07:00	07:30	08:00	08.30	09:00	0930	10:00	10.30	11:00	11:30	12:00	12:30	13.00	13:30	14:00	14:30	15:00	15:30	16:00	16:30	17:00	17:30	18:00	18:30
Nitesh Naik																								
Prashant Chavan								Resiliefo	wn, gem	adres :	0			Break	down, siz	nstra die	÷							
Sachin Ayar								Inst																
										5	Book Ho	liday												
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										0	Create J	ob												
											thou th	ner Cal	andar											

Steps to create a job from the timeline

- 1. Go to Schedules \rightarrow Schedule Timeline. It will display the Schedule timeline page.
- 2. Right click on any blank cell then it will display options.

3. It will display Book Holiday, Book nonactivity, Book On Call, Create a job, Show Users Calendar.

4. It will take to you create a job page. It has already added engineer because we clicked on engineer cells. If you want to add a team then click on any team from schedule-timeline and right-click on and choose to create a job then it will add a job for the team.

5. Click on the edit icon of that record then It will display the Edit job page.

Here you can see the multiple activities because this is created as assets/facilities related activities. It will create a number of activities as you selected a number of assets plus the number of facilities. Here you can add the engineer/ team to assign this job to engineer or Team and click on the "Save" button. Then this job's status will change from Unallocated to schedule job.

Add a New Job:

To add a new job, from left menu select "Jobs > Add Job".



On next screen, enter following details:

1. Site:

Type 3 letters to view saved sites in drop down list. Select your desired **Site** from the list. 2. Site Information:

Enter any Instruction / Notes for Engineer here.

- Activity Type: Select an Activity Type from drop down list. Enter a required Required to Start By time and Required to Complete By Time.
- Select Engineer: Type a name to view Engineer name suggestion from saved list of Engineers. Select Engineer from drop down list and assign the Start time & End Time for the job.
- 5. Click "Save" button to add the job.

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Lill Reports													
Schedule	Site	D0011 - Aaswad			D001	1 - Aaswad - Dadar West, Ser	na Bhavan Shiv	aji Park, Gao	ikari Chau, 400	0002.			
Jobs	Site Information	Please enter Site informa	tion.		//	There are few activities ongoi	ing at this site						
© Sites	Activities 1 activity O	7:00		Priority: Cow	K								
Team	fire extinguisher installation	X Add Activity			Sele	ct Engineers							
Forms	Activity Type	fire extinguisher installa	tion	~	Team Leader	Name		Start		End		Travel	
Documents	Record Entry Date	02-01-2024 12:40	Avg. Duration	7 hours	۲	Shubham, <u>Kaneri</u>		02-01-2	024 12:40	02-01	2024 19:40	ې چ	Ŵ
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<u>±</u>	Reference No	N/A 🗸											
Bulk Upload	Originator Reference	Originator Reference	Project Ref No	Project Ref No	Re	QUITED SKIIIS							
	Activity Information	Activity Details (Upto 400	00 characters are allowed.)	1		0							
			x Car	icel 🗙 Delete ✔ Save									_

Pending Jobs:

View Pending Jobs by using left menu to click "Jobs>Pending Job".



Pending job is used to create new jobs as Unallocated (didn't assign the job to any engineer/team), Scheduled (assigned engineer/team, fixed the date and time to be scheduled), Assigned (Assign to engineer/team but not schedule the date and time).

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Team	1	0	04/01/2024	D0011 - Aaswad		fire extinguisher in:	stallation			vinayakENG	FIRE1 mem	ane

To add a new Pending Job:

- 1. Go to Jobs > Pending jobs. It will display the Pending Job List page.
- 2. If you want to create a new job (pending job) then click on the "Add Job" button.
- 3. It will display the Add Job page. Here you have to enter the following details. <u>Site:</u>

Type 3 letters to view saved sites in drop down list. Select your desired Site from the list. <u>Site Information:</u>

Enter any Instruction / Notes for Engineer here.

Activity Type:

Select an Activity Type from drop down list.

Enter a required Required to Start By time and Required to Complete By Time. <u>Select Engineer (Optional)</u>:

It is optional to add an Engineer name. Type a name to view Engineer name suggestion from saved list of Engineers. Select Engineer from drop down list and assign the Start time & End Time for the job.

Click "Save" button to add the job.

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e Dashboard	Add Job < Return	To Previous Page 👔				
[.ll] Reports						
Schedule	Site	D0011 - Aaswad			D0011 - Aaswad - Dadar West, Sena Bhavan Shivaji	Park, Gadkari Chau, 400002.
Jobs	Site Information	Please enter Site informat	ion.	,	> There are few activities ongoing at this site	
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	Originator Reference	Originator Reference	Project Ref No	Project Ref No		
	Activity Information	Activity Details (Upto 400	0 characters are allowed.)	li.		

Completed Jobs:

To view Completed Jobs, from left menu navigate to Jobs > Completed Jobs.



Here you can view list of Completed Jobs. The jobs listed here have been marked Completed by your Engineer and submitted on the mobile app.

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				≪ < Page 1 o	f 1 🔊 📎 🛛 25	✓ View	v 1 to 9 of 9 (filtered from 15 total entries)	

To view details of a Completed Job, select any row and click on eye icon in Actions column.

Actions O	5
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Edit	

Click on Blue row to toggle and view Job details and submitted Forms.

2			Quick links 🗷 🛛	
Cashboard	PARTLY COMPLETED Job - 52	Return To Previous Page		
Lill Reports	Aaswad - D0011			Child Job
Schedule	Started - 29/12/2023 09:16			
Jobs	Partly Completed on	fire extinguisher installation	Outcome : Completed	
© Sites		Originator Reference :	Activity ID : 54 Project Ref No :	
team (Activities	Fadilty:	Project No :	
Forms	1 Engineers	Asset : Activity Details :	Sub Task : Payment Type :	
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Configuration	POWR Close of Work H&S Stgr-in Climbing Audit Feedback	Verw Activity Chain Completed By: vinayakENGFIRE1 memane Outcome : Completed Di drome Noter	Start : 29/12/2023 09:16	End : 29/12/2023 09:17
	Site Information	vinayakENGFIRE1 memane : testing	numy many	
		New Form Q.1	Completed	

If you want to view submitted form then click on Form Name row. Here you can download the form as PDF, Excel, Word Document as well as you can edit the form by clicking on the edit

icon.

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Team			ß	STAFF ARRIVED	29-12-2023 09:19	Aaswad - D0011		fire extinguisher installation, fire	vinayakENGFIRE1			
Econor	2024 I	1 Engineers						extinguisher installation				
Documents		0 Documents 0 Pre-task			(Page 1 of 1) >>	25 🗸	View 1 to 1 of 1 (filte	red from 59 total entries)			
Configuration	-	POWR Close of Work		Show Pictures								

If you want to view Completed details then click on Completed on the tab. Here you can view the Completed job date and time, Site name, Activity Type, etc.

PARTLY (COMPLETED Job - 52 <	Return To P	revious Page					Child Job	ľ
Started	- 29/12/2023 09:16 Partly Completed on 29/12/2023 09:19	ာ View Jo Post Jol	Ib History Divew Case No	tes View Access Permit					
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	0 Documents 0 Pre-task		Hide Pictures		« («	Page 1 of 1 > >	25 💙	View 1 to 1 of 1 (filte	red from 59 total entries)
▲ ⊘	POWR Close of Work H&S Sign-in Climbing Audit Feedback Site Information	Uploa	Select All	Uploaded by: vinayakENGFIRE1	Uploaded by: vinay memane 29(12/2012 06-19	akENGFIRE1 Uploaded by: vinaya memane	KENGFIRE1		

To view submitted Pictures click on "Show Pictures" button. It will display Pictures / Photos recorded against that job.

PARTLY	ARTLY COMPLETED Job - 52 <return page<="" previous="" th="" to=""></return>										
Aaswac	i - D0011	Child Job									
Started	- 29/12/2023 09:16										
Partly Completed on 29/12/2023 09:19	Engineer	Scheduled Start	Scheduled End	Travel	Actual Start	Actual End	Travel				
	29/12/2023 09:19	vinayakENGFIRE1 memane	29-12-2023 09:16	29-12-2023 16:16	40	29-12-2023 09:16	29-12-2023 09:19	0			
×.	2 Activities										
***	1 Engineers										
	0 Documents 0 Pre-task										

To view Engineer details then click on the Engineers tab. Here you can see Engineer name, different times such as Scheduled Start, Scheduled End, Schedule Travel, Actual Start, Actual End, Actual Travel time.

Engineer Daily Map:

To view Engineer's Daily Map, on left menu navigate to **Jobs > Engineer Daily Map**.



Here you can track Engineer Daily travel location. To filter enter an **Engineer Name** from drop down list, **Select a Date** and click on "**Go**" button.



Engineer Location:

To view Engineer Location, on left menu navigate to **Jobs > Engineer Location**.



Here you can view an Engineer's current location. Select an Engineer's name from the drop down.



To Do List:

To view To Do List, on left menu navigate to **Jobs > To Do List**.



Here you can view activities assigned to and Engineer.

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team.	Job ID T Open V Item Type T Item Type Details T Assigned Role Assigned Agent Site		T Due Date T
Forms	No matching records found	View 0 to) of 0 (filtered from 22 total entries)
Documents			

Aborted Jobs:

1 ¢ Abort Job Center Dashboard лı × A Mumbai Reports 雦 Schedule Actions Status Add Job Jobs Pending Jobs Ø Completed Jobs Sites Engineer Daily Map 202 Team Engineer Location Ŀ To Do List Forms Aborted Jobs Documents

To view Aborted Jobs, using left menu navigate to **Jobs > Aborted Jobs**.

Here you will get to view list of Jobs marked as **Aborted** (cancelled) by engineer.

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Team							≪ < Page 1 of 1 > > 25	*					View 1 t	o 2 of 2 (fi	itered fr	om 5 total entries))

Add Site:



Sites(Customer) means the location of the job and information about the site where job is to be scheduled. The job scheduling and job activity depends upon Site.

To Add a Site:

- 1. Go to Sites > Add Site. It will display the Add Site page.
- 2. By default you can see Site Details tab. Other tabs shown are **Contact Details, Contract Info, Contract Owners** and **Site Properties** tab.

The following field with meaning as follows Asterisk(*) mark indicates a mandatory field.

• Site Name *:- Customer Name

• Site Code *:- The unique code for each site, Here you have to enter at least three characters for an auto search option. It cannot be able to change after the saved site.

- Site Type *:- Select the site type (predefined in site type configuration page).
- Status * :- Select the Status as ACTIVE/INACTIVE.
- Region * :- Select the region (predefined in Region configuration page)
- Area *:- Select the area (predefined in Area configuration page)

• Address Line 1 *:- Address is divided into 3 parts as Address Line 1, Address Line 2, Address Line 3 because each Address Line is limited to 50 Characters.

- City/Town:- Here you can enter City/Town name.
- State:- Here you can enter the State name.

If you enable the "**Manually override location coordinates?**" The option then you have to enter Location Coordinates. Location Coordinates can be found on Google Maps (mandatory if enable the above option)

- Latitude:- Here you have to enter Latitude of area.
- Longitude:- Here you have to enter Longitude of area.

View All Sites:

To view all saved Sites, use left menu to navigate to "Sites > View All Sites".



All saved records are show in a list. At a time 25 records are displayed on first page.

Use pagination at bottom to view next page.

All Sites 🕧					
🕇 Add 🕜 Edit	S View Activity History	sitory 🕇 View Assets 📓 View Notes 🕅 V	View Facilities		
Actions	Site Name 🕐	Site Code 🧿	Address 🕐 🔻	Contact Name T	Contact No T
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To edit any record, click on the pencil icon (Edit) to edit that record.

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lobs	n 🖉 🔁 🕈 👔 🖓	Aaswad	D0011 - test Alias Reference(Originator / Customer Fire)	Dadar West, Sena Bhavan Shivaji Park, Gadkari Chau, 400002.			
1		Suresh Medical Stores lokmanya pagar lokmanya	10055	Suresh Medical General Stores lokmanya pagar			

AMC Job Type:

To view AMC Job Type screen, use left menu to navigate to " Site > AMC Job Type ".



This is a **configuration** screen where you can add details of the AMC activities such as **Activity Name**, **Activity Description**, **Repeat Interval**, **Lead Time** :

AMC Job Types				
+ Add				
Actions	Name	Description	Interval	Lead Time
	Fire extinguisher maintenance	Fire extinguisher checks: Weight, expiry date, Nozzle.	90	2

To add a new AMC Job Type, click on the "Add" button at top left.

Edit AMC Job Type 🔺	Return To AMC Job Types			ľ
Name: *	Fire extinguisher maintenance	Description:	Fire extinguisher checks: Weight, expiry date, Nozzle.	
Repeat Interval (in days): *	90	Lead Time (in days):	2	\$
			× Cancel 🗸	ave

Contract Details:

In **Contract Details** screen, you can **add your sub-contractor details** under Contract Owner details.



You can Manage Contract Owners and Edit Contract Owner details.:

Manage Contract Owners

+ Add Cont	ract Owner 🕼 Edit Contract Owner		
			Search:
Actions 🗘	Originator / Customer 🗢	Address ¢	Status 🗢
1	MIDC	Ambernath, MIDC	ACTIVE
1	Shubham	501, 9 Mansi, Cross Lane No.1, Ram Maruti Rd 789456	ACTIVE
1	Vinayak	454355	ACTIVE
			View 1 to 3 of 3

2				Quick links 🔳 🛛 🔒 💡	+ Welcome vinayakAdFIRE men
Cashboard	Edit Contract Owner	Return To Manage Contract Owners			
[.lll Reports		• •			
ff Schedule	i Originator / Customer Details	Address Payment Address			
jobs	Originator / Customer *	MIDC	Status: *	ACTIVE	~
© Sites	Description:	Sub-contractor for work.	Notes:	Enter notes (Max 500 characters)	
🏙 Team	Title:	Select title	•		A
Forms	Forename:	Shubham	Surname:	Kaneri	
Documents	Email:	shubham@gmail.com	Telephone:	9876546547	
Ç Configuration					🗙 Cancel 🖌 Save
L Bulk Upload					

Enter Originator / Customer name and Status.

For technical support contact: support@fissaramanage.in

Enter other fields as follows:-

- Originator / Customer * :-Here you have to enter Customer / company/ organization name
- Status *:-You have to choose Status as active.
- Description:-You can give a description of Contract Owners.
- Title:-You can choose Title as Dr / Miss / Mr / Mrs /Ms.
- Forename:-You can enter the first name of the customer.
- Surname:-You can enter the last name of the customer.
- Email:-You can enter an email address of the customer.
- Telephone:-You can enter the telephone number of the customer.

Site Access Details:

Site Access Details is additional information about who has access to a Site.

To view and add new records, use left menu to go to "Sites > Site Access Details"



To add new records:

- 1. Go to Sites > Site Access Owner. It will display the Manage Site Access Owner page.
- 2. If you want to add site access owner then click on the "Add Site Access Owner" button.
- 3. It will display the Add Site Access Owner page. Here you have to enter Site Access Owner name compulsory, and remaining fields are optional. All field details are given in place holder (text field caption). Click on "Save" button.
- 4. It will display "Site Access Owner saved successfully" message and redirect to Manage Site Access Owner page. There it will display newly added Site Access Owner record.

@				Quick links 🔳 🥹 🆀 🕈	+ / Welcome vinayakAdFIRE men
C Dashboard	Add Site Access Ov	VNET <return access="" manage="" owner<="" site="" th="" to=""><th></th><th></th><th></th></return>			
Lill Reports		•			
Schedule	Name: *	Mahendra	Website:	http://www.example.com	
Jobs	Contact Tel No:	987654213	Contact Email:	mahendra@gmail.com	
© Sites	Alternative Contact No:	Enter alternative contact number	PO Number:	Enter PO number	
📸 Team	Days Notice Required:	2	Documents Required:	Enter documents required	
Forms	Form Location:	Thane			
Documents	Additional Details.	Has keys to main door and 3 internal locks.			
Configuration					le le
1 Bulk Unload					🗙 Cancel 🖌 Save

Site Visit Map:

To go to the page, use left navigation and select "Sites > Site Visits"

A map view showing a day's scheduled Site Visits.





<u>Team</u>

Manage Staff:

You can add and manage your staff users form this screen. To access the screen, use left menu and navigate to "Team > Manage Staff"



The default view shows your existing Active staff members.

2				Quick links 🔳 🔮	
Cashboard	Manage Staff				
Lill Reports	+ Create User 🖋 Edit	4 Change Password 🔋 Remove 🛒 View Notes			
m	Actions	Name T	User Name T	Role T	User Type T
Schedule	🖋 🔍 🛍 📓 🚱	vinayakAdFIRE memane	vinadminfire	Admin	Employee
lobs	e 🥙 🛍 📓 😔	vinayakENGFIRE1 memane	vinengfire	Engineer	Employee
0	🖋 🔍 🟛 📓 🥝	vinayakENGFIRE2 memane	vinengfire2	Engineer	Employee
Sites	🖋 🔍 🖻 📓 🤡	Akash Gupta	akashv2s	Engineer	Employee
Team	🖋 🔍 🛍 📓 😣	Ekta Hande	EktaHandeAdmin	Admin	Employee
II.	🖋 🔍 🛍 📓 🚱	NewUsaer NewUserkalsjklj	NewUserName	Admin	Employee
Forms	🖋 🔍 🛍 📓 🥝	Shubham Kaneri	Shubham007	Admin	Employee
	🖋 🔍 🛍 📓 🤡	Satish Chaurasiya	satish123	Admin	Employee
Documents	🖋 🔍 🟛 😭 😒	Sanat Teli	sanateli	Admin	Employee
Configuration	🖋 🔍 🖻 📓 🚱	Pushkarraj Pujari	ppujari	Admin	Employee
📩 Bulk Upload				25 🗸	View 1 to 10 of 10

To edit any staff member record, click on the pencil icon in that row. You can now edit the person's details in next screen.

fissara **manage**

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		Sites		ø	a,	Ŵ	6	0			Akas	h Gupta	9						
		22 T		ø		Ŵ	ľ	0			Ekta	Hande							
		ream		ø	Edi	t Us	er	Ø			New	Usaer N	lewU	serk	alsjklj				
		Form:	s	ø	a,	圃	ľ	0			Shub	ham Ka	aneri						
2												Quic	k links	8	0	•	ŧ	Welcome vinayakAdi	FIRE men
Dashboard	Edit User »	(Login name : Sh	ubham007) 🔇 Retu	rn To N	/lanage S	taff													
Reports																			
Schedule	Personal Inf	• 🔮 Next of Kin	🚔 Employment Deta	ils 🗲	Vehicle	🗘 Us	er Restricti	ion 🎤	Assign Skills	≓ Assign	Workflow	🎓 Training	🕄 Medi	cal 🔦	Equipment				
			First Name*		Shubl	nam					Last Na	ime *		Kaneri					
2005			D.O.B.		Date	of Birth					Userna	ime *	-	Shubhan	1007				
Sites			House Number		#12						Street			Street N	ame				
Team			City/Town		City o	r Town na	ime				Pincod	e *		400601					

In the Edit User screen, you can edit details such as Name, Date of Birth, Address, Email id, Mobile number and profile photo.

shubham.kaneri@v2stech.com

Mobile Phone

Edit Profile Picture

9876543211

Choose File No file choser

⑦ Discard these changes ✓ Sa

Forms

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L Bulk Uple

Do

Cor

State

Residence

Email *

Manage Department:

In Department you can add multiple Departments as per your organization structure. Each Department can have multiple teams. Example - Suppose there are Security Department, Fire Department etc.



To Add a New Department:

- 1. To add a new Department, go to **Team > Manage Department**. It will display Manage Department page.
- 2. Click on the "Add New Department" button.
- 3. After clicking the button a popup **Add Record** will be displayed. Enter the **Department Name** and **Manager** mandatory and click on "**Submit**".

Manage D	epartment	
+ Add New Depar	tment	
Add Record	×	
Department Name	ССТУ	
Manager	Shubham Kaneri	
	Submit X Cancel	
gdhthrt gdhthrt		

To Edit any existing Department, click on the pencil icon in Action column to Edit that row.

Manage Department



Manage Grade:

To manage and add Employee grade, navigate using left menu to "Team > Manage Grade".



Click on "Add New Grade" button to add any new details.

2	
Cashboard	Manage Grade
[.ll] Reports	+ Add New Grade
Schedule	Add Record
	Grade Name Grade-1
Jobs	Manager Yes 🗸
Sites	Hrs/Week 80
😁 🖌	Days/Week
È	Hash Days? No 🗸
Forms	Submit X Cancel
Documents	

Manage Team:

Here you can create Teams for a particular Department.



To add a new team then click on the "Add New Team" button.

1. After clicking on add team It will display Add Record popup screen.

- Team (Mandatory):- Enter the team name. It should be unique.
- Shared Device (Optional):- It is by default selected Yes option. If it is selected as "Yes"

then it will display team-related jobs on an android device else if it is selected as "No" then it will not display team-related jobs.

- Division (Mandatory):-Here you can search the Division name by typing three-character or you can enter the full division name.
- Manager (automatically added after entered division):-The division manager will automatically add after selecting division name.
- Team Leader (Mandatory):-Enter or search team leader name from your user list.

Note: The Team name should be unique. Also user cannot be the team leader of multiple teams.

Skills Category:

To add configuration labels for Skills Category, use left menu to go to Team > Skills Categories.

If you want to add Skill Category then click on the "Add Skill Category" button. After clicking on Add, a Add Record popup screen will be displayed. Now enter the Skill Category Name.

			Quick links		۲	8 4	9	ŧ
Ski	ills	Category Admin						
+ Ad	dd Sk	Il Category						
Actio	ons	kills Category Name						
		nechanical diploma						
ø	1	lectrician						
		(() () Page 1 of 1 () () 25 V						
	Sk +A Actio	Skills + Add Ski Actions S P n P E	Skills Category Admin Actions Skills Category Name Mechanical diploma Elsectrician	Quick links Skills Category Admin Actions Skills Category Name Actions Skills Category Name Electrician Electri	Quick links Skills Category Admin * Acd Skill Category Actions Skills Category Name mechanical diploma Beterrician <t< th=""><th>Quick links</th><th>Quick links Image: Comparison of the second s</th><th>Quick links Image: Comparison of the system of the s</th></t<>	Quick links	Quick links Image: Comparison of the second s	Quick links Image: Comparison of the system of the s

Manage Skills:

To Manage Skills labels and their related details such as Specialized Skills Certificate details.

2					Quick links			2+	•	‡	Welco vinaya	me IkAdFIRE men
Cashboard	Manage Skills											
[.lll Reports	+ Add O Make In	nActive										
Schedule	Active 🛩 All	~								Search:		
-	Actions 🗢	Skill \$	Status \$	Category \$	Certificate Required	¢ (Certificat	e			¢	Color 🗢
Jobs		Mechanical engineer	Active	mechanical diploma	N							
Sites				🔍 🔇 Page 📘 of 1	> > 25 🗸						Vie	w 1 to 1 of 1
🆀 Team												
Forms												

- 1. If you want to add new skills then click on the "Add" button.
- 2. After click on **Add** and it will display the **Adding New Skill Type** page. Here you have to enter Skill Name and select Category compulsory.

2				Quick links		۲	4	የ ₹		Welcome vinayakAdFIRE me	en
Cashboard	Adding New Skill Type 🔇	Return To Skills Category Admin									-
Lill Reports	Chill Mamor		Categorit								
Schedule	Status	Enter Skill Name	category-		Select	t Categor	y		+ Add	New Category	
Jobs	Skill Description	Active	Certification Required		No	×					
O Sites			Certificate Description								
team 🔛											
Forms	Colour		h							1	
Documents											
Configuration										Add Cano	el

- 3. Enter remaining fields as follows:-
 - Skill Name *:- Here you can enter the skill name.
 - Category *:- Select Category (predefined in Skill category).

- Add New Category button;- if you click on the "Add New Category" button then it will redirect to the "Skills Category Admin" page.
- Status:- it is by default as "Active". But it contains an Active/Inactive List.
- Skill Description:- Here you can enter the description of the skill.
- Color:- You can select a color from the color option.
- Certification Required:- You can select the Yes/No option.
- Certificate Description:- You can enter the certificate description.
- 4. Once all mandatory details are filled, click on "Add" button.
- 5. It will display "Skill type added successfully." Click on the "**OK**" button.

Forms:

To view all your Forms in the custom form builder, use the left menu to navigate to **Forms > Create Forms**.



Here on "List of Forms" page, all previously created / published forms will be displayed.

2					Quick lin	ks 🔳 🛛	& ♀ ≠ / Welcome vinayakAdFIRE men
Cashboard	List of Forms						_
Lill Reports	🕈 Create New 🛸 Mana	ge Form 🖌 Edit Form Details 🔌 Create I	New from Copy				
1 Schedule	Actions	Form Name	۲ Status	All Category	T Last Published Date T	Published By T	Activity Types T
	► / Y A E O	New Form	PUBLISHED	Sample Form	05/12/2023	vinayakAdFIRE memane	fire extinguisher installation, Audit
Q Sites	특 / 쓸 쇼 필 이	Checklist	PUBLISHED	Check list form	05/12/2023	vinayakAdFIRE memane	fire extinguisher installation, Audit
2000 E	► / 쓸 쇼 필 ◊	Fire Feedback form	PUBLISHED	Feedback Form	02/12/2023	Fissara Admin	fire extinguisher installation, Audit
Team	Create Forms			≪ < Page 1 of 1 (> » 25 v		View 1 to 3 of 3
Forms	Submitted Forms						
Documents							
Configuration							

To create a new form:

- 1. To create a new form, click on "Create New" button.
- 2. On next screen, Form Builder >> Create Form page will be displayed. Here you have to enter Form Name and select Category is mandatory. A description is optional.
- 3. Next click on the "**Design**" button.

fissara**manage**

Name	Sample Service Report	
Description	This is sample service report template	
Version	1	
Category	Sample Service Report test *	

Next screen will display **Form Name** and the form design workspace. Here you can design your custom form.

		* Enter section name	Branch		e e 🔒
0	B				
			🚸 Back to M	Amage Form 12 Save & Com	anue 👘 Servers Provense

If you want to add a section then click on this icon.

If you want to add a subsection then click on this icon.

If you want to add a question then click on this icon.

If you want to add extra question field then click on this icon.

You can design a form using following:

- Section: You can Add Section To Form. It will be your first Content of forms. Without Section, you can't create form.
- Subsection: You can add a subsection within / below a Section.
- 3. Question:

You can add the question to section, subsection. If you want to input from the user then you have to add a question compulsory. And Every Section, Subsection compulsory requires at least one question.

- Question Field: Here you can add question field to every question. You can add multiple question field to only one question also. For every question, it must have at least one question field.
- 5. After entered Section name then click on the middle of Section Row. It will display a section icon, subsection icon, and question icon. If you click on add Subsection icon then it will display subsection attached to a section or if click on the add question icon then it will display question attached to section.
- 6. Options for subsections:

This is a repeat icon. Use this to repeat section, subsection, question in the form in the mobile app.

This is a Notes icon. You can add your notes using this icon.

This Copy icon. Use this icon then to repeat same Sub Section or question, answer field.

This is a delete icon. If you click on this icon then it will delete a section, subsection, question, answer field.

avigation		Customer Details	Branch	
Customer Details		Customer Name & Address	5	이 다 선 😫
X Customer Name		Customer Name		ු ප 🖄 🔒
	B	Select a Field Type	to Add 🔻 🔅	28

Here you can see you select a question field type to Add as Text:

It will display text field as a single line and multi-line. In a single line the character limit is 0 to 50. In multi-line characters limit is 0 to 5000.

Number:

Here we can enter Min Number(number range starts from e.g. 1, 100, etc.) Max Number (number range ends till 100000, 1000, etc.) and Decimal from 0 to 4. Here you can enter choose how many digits decimal points you want.

List:

Select a list as Add New List/Choose from a library.

Picture:

Capture (take a photo from the android device)/ Draw (draw picture using pencil and brush like paint) / Capture + Draw (It can capture pictures from android device and draw any shape on that picture).

Signature:

Signature (It is the same as we do sign on paper but the difference is it is on android device).

Date:

Date It will display date picker on android smartphone.

DateTime:

It will display the date and time picker both.

Address:

It will display Address tabs Here you can see. Street, Town, Country, postcode text fields. Sample Service Report

How to Manage Form (Edit, Preview, Publish, Delete, New Version)

1. Go to Forms > Create Forms. It will show a List of Forms.

- 2. To manage (edit, publish, delete, etc) the form then either click on manage icon of record or select the record and click on the "Manage Form" button.
- 3. On next screen **Manage Form** page will be displayed. Now the form is in development status. It will display Last Saved Date, Created By field.
- 4. To start using form, select that row and click Publish button.

O Publish	O Publish									
🕼 Edit 🔹 Pre	eview OPublis	h 🔋 Delete	New Version							
Version	τ	Status		۲	Last Saved Date	1				
2		DEVELOPMENT			03/01/2024					

- 5. After development then you have to publish the form to use it. If you select the form then it will display Edit, Preview, Publish and Delete button.
- 6. A Popup screen with confirmation message will be displayed. "Form is about to be published and this will replace any previous versions which will be archived. Is this OK?"

Click on the "OK" button.

Manage Fi sample Service #	orm «	Return to form	Porm Version previous versi	t of Sample Service Report ons which will be archived.	is about to be is this, OK7	pat	(ished)	and this w	ell yaş	tace any X			
Credi •m	niteres 🔽	Status	T	Last Saved Date		Ŧ	Public	ned Date			Ŧ	Created By	1
r.		DEVELOPMENT		01/02/2019								Rajly Metria	
				€ C Page	T at the	0		25					Year 1 to 1 of 1

- 7. The form status will change from DEVELOPMENT to PUBLISHED. It will display published Date.
- 8. If you want to return to form list then click on "Return to form list".

NOTE: You can only delete form when it is in Development status.

Add Forms to Activity type:

1. Go to **Configuration > Job Activity Type List**. It will display the **Manage Activity Types page**.

O [°]	Office timings
Configuration	Area
🏩 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties

2. Select the activity type you want to attach form then click on the "Edit" button.

fissara manage

Manage Activity Type List 💿					
+ Add 2 Edit					
Edit					Search:
Activity Type 🗢	Average Duration \$	Status 🗢	Date Created \$	Created By	\$
Audit	120	Active	06/12/2023	vinayakAdFIRE memane	
fire extinguisher installation	420	Active	02/12/2023	vinayakAdFIRE memane	
	(() () Page 1	of 1 > >>	25 🗸		View 1 to 2 of 2

3. Activity Settings page will open. In **General Settings** tab, under Forms, select the Form you want to add from the **Select Form** drop down menu.

Cashboard	Manage Activ	vity Type	e < Re	eturn To Manag	ge Activity Types						
LIII Reports											
# Schedule	🖋 General Settings	🕑 SLA & Res	ponse	🗲 Assign Skills	\delta Components	🖬 Outcomes					
)obs	Edit Activity Type	e									
© Sites	Activity Name *		fire ext	fire extinguisher installation							
📸 Team	Average Duration (n	ninutes) *	420								
Forms	Activity Reference		Enter Activity Reference								
Documents	Department		Install	lation				~			
og	Forms										
Configuration	Add Form	Add Form Select Form									
Bulk Upload	Existing Forms:		Select New F	Form							
	Pre-Tasks		Fire Fe Check	eedback form list							

Create a New Version of the Previous form:

New Version:

It is not possible to edit an already Published form. You can create a Copy of that form and create a new version of same form to replace it.

To create a New Version:

- 1. Go to **Forms** → **Form Builder**. It will display a list of forms.
- 2. If you want to create a new version of the form or want to edit the form then click on the **Manage Form** icon.
- 3. On next screen Manage Form page will be displayed. Here you cannot edit published form directly. So you have to select the form and click on the "**New Version**" button.
- 4. It will display "Successfully created new version" popup screen. Click on "OK" button to proceed.

Ef Edit	Preview	O Publish	🖹 Delete	New Version							
Version		۲	Status		۲	Last Saved Date	۲	Published Date	т	Created By	۲
2			DEVELOPMENT			03/01/2024				vinayakAdFIRE memane	
1	PUBLISHED			05/12/2023		05/12/2023		vinayakAdFIRE memane			
								> >> 25 ¥			View 1 to 2 of 2

5. A new form marked as **DEVELOPMENT** status will be added. Here you again edit, preview, publish, delete the form. If you select the record and click on the "**Preview**" button.

6. Then it will display a preview button.

7. If you want to see a preview of the next section then click on the forward icon that lies between Navigation and Sections. If you want to do a mange form then click on the "**Manage Form**" button.

8. It will display the Manage Form page. If you want to publish that updated form then select the record and click on the "**Publish**" button. It will display a popup up the screen as "Form Version 2 of <form name> is about to be published and this will replace any previous version which will be archived. Is this OK ? " then click on the "**OK**" button.

Manage Fo	Manage Form « Return to form Sample Service Report			Form Version 2 of Sample Service Report is about to be published and this will replace any $^{\rm III}$ previous versions which will be arithwed, is this OK?					
Sample Service A	eport.					Const	ox.		
Version	۲	Status	٣	List Saved Date	۲	Published Date	٣	Created By	Ŧ
2		DEVELOPMENT		04/02/2019				Rajiv Mehta	
τ.		PUBLISHED		01/82/2019		01/02/2019		Rajiv Mehta	
				(c) (c) Page	ar i l o	> 25 - 9			View 1 to 2 of 2

9. It will display again popup screen as "Form Version 2 has been published successfully" click on the "**OK**" button.

10. It will display form is in **Published** Status. Here the previous version goes to **Archived** status. So again if you want to edit the form then select the **Archived** form or published form depending upon your template. If you want to return to the form list then click on the "**Return to Form List**" link.

Completed Forms

Use left menu to go to **Forms > Submitted Forms**. It will display list of Submitted Forms. Here you click on any icon in **View As column** to view submitted forms as PDF, Word, Excel.

e Dashboard	Submitted Forms						
[.ili] Reports	By default, this page displays forms su	ibmitted over the past 30 days. If you a	re interested in older data, please cho	ose a date range below.			
Schedule	Name T	Form T	Originator Reference	Reference Number T	Submitted By	Submitted On T	View As
	D0011 - Aaswad	New Form		•	vinayakENGFIRE1 memane	02/01/2024 17:07	🔁 🖬 😡 😔
Jobs	L0055 - Suresh Medical Stores lokmanya nagar lo	New Form		-	vinayakENGFIRE1 memane	02/01/2024 16:58	🔁 🗟 🗟 🥺
Sites	D0011 - Aaswad	New Form	-	-	vinayakENGFIRE1 memane	29/12/2023 09:18	🔁 🗟 🖬 😪
Team	D0011 - Aaswad	New Form	-	-	vinayakENGFIRE1 memane	29/12/2023 09:17	
Forms	L0055 - Suresh Medical Stores lokmanya nagar lo	New Form		-	vinayakENGFIRE2 memane	28/12/2023 17:27	
	D0011 - Aaswad	New Form		-	vinayakENGFIRE1 memane	28/12/2023 17:18	🖄 🖬 😒
Configuration	L0055 - Suresh Medical Stores lokmanya nagar lo	New Form			Akash Gupta	28/12/2023 09:33	2 🗟 🗑

Configuration

Office Timings:

Use left menu to go to **Configuration > Office Timings**.

Documents	
o:	 Office timings
Configuration	Area
🔔 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties
	Form - Categories
	Form - List Items

Here you can set your Public Holidays dates list, Add a New Public Holiday Zone, Standard Working week days eg. Monday to Friday, Thursday to Tuesday, Monday to Saturday.

Office Timing)ffice Timing											
💾 Public Holidays	Public Holiday Zones	O Standard Working Week	📽 Proximity Scheduling Configuration	😂 Scheduling Parameters	🗘 🖧 Timeline Rules							
		1										
Public Holida	ys											
+ Add New Holiday	INDIA	Delete Holiday										
Holiday Title	Polica Pale											
Office Timing												
Public Holidays	Public Holiday Zones	O Standard Working Week	😋 Proximity Scheduling Configuration	Scheduling Parameters	Oo Timeline Rules							
	7											
Public Holiday	Zones											
Individual users can b	e assigned to a public holida	ay zone from the "Edit User" page	e. To bulk update users who do not have a	zone assigned, press the butt	on below.							
		_										
+ Add New Zone	🖋 Edit Zone 🔋 Delete	2 Zone										
U	Name											
Office Timing												
💾 Public Holidays	Public Holiday Zones	O Standard Working Week	O Proximity Scheduling Configuration	00 Scheduling Parameters	📽 Timeline Rules							
Standard Wou	rking Mook											
Edit Shift	I KIIIg Week											
Day		Start time	End time	Flex st	art	Flex end						
Total Hours in a Week	=											
Average Hours per Da	ay =											

Region:

Regions is used to display jobs on Schedule Timeline region-wise. If Thane is region then we can see how many pending jobs, Completed jobs in Thane.

2	
B Dashboard	Manage Region 💿
L <u>ilil</u> Reports	Add Region
# Schedule	
	Actions Region Name
Jobs	Ј&К 1233
Sites	🔗 Mumbai
📽 Team	Thane
Forms	1
Documents	
Configuration	Office timings
🏩 Bulk Upload	► Region

To Add a new region:

- 1. Go to **Configuration > Region**.
- 2. To add a new region click on "Add Region" button.
- 3. Add Record popup screen. Enter the Region Name and Region Manager name.

4. Entered **Region Name** and **Region Manager name** then click on the **"Submit"** button.

Manage	Region 🧿
Add Region	
Add Record	×
Region Name	Mumbai
Region Manager	Akash Gupta
	Submit X Cancel
J Thane	

To edit an existing record of region, then click on Edit icon (pencil icon) of that row.

Area:

Area is used to filter the jobs according to areas. A Region will have multiple areas. Eg: Thane region can have areas such as Naupada, Majiwada, Ghodbunder Road etc.

2		
C Dashboard	Mana	age Area 💿
lılı Reports	+ Add Ar	ea 🔮 Assign Users
Schedule	Actions	Area Name
Jobs		Dadar
© Sites	J.	lokmanya nagar Jammu 132232
📸 Team	1	Rabodi
Forms		
Documents		
Configuration	Office timi	ngs
L Bulk Upload	Region	

<u>@</u>				Quick links		۲	4	•	ŧ	Melcome vinayakAdFIRE men
Cashboard	Ma	nage Area 💿								
[.ll] Reports	+ Ac	d Area 🛛 📽 Assign Users								
61	Action	ns Area Name	Region Name	Area Mar	ager					
Schedule	~	~	~	~						
Jobs	ø	Dadar	Mumbai	vinayak n	emane					A
Q	ø	lokmanya nagar	Thane	vinayakA	FIRE men	nane				
Sites	A	Jammu 132232	Mumbai	vinayakA	FIRE men	nane				
쓭		Rabodi	Thane	vinayakA	FIRE men	nane				
Team										•
Forms			《 < Page 1 of 1 (> >> 25 🗸						View 1 - 4 of 4
Documents										

1. Go to **Configuration > Area**...

- 2. To add a new Area, click on "Add Area" button. The area is used in timeline to show assigned users in that area.
- 3. An Add Record popup will be shown.

4. Entered Area Name, Region Name and Area Manager name then click on the "Submit" button.

аг	Add Record	ł	×
ır	Area Name	Majiwada	
aı	Region Name	Thane 🗸	
	Area Manager	Akash Gupta	~
		✓ Submit	× Cancel

To edit an existing record of area, then click on Edit icon (pencil icon) of that row.

Job Activity Type List:

Job Activity Type is the name of the task/work that an Engineer / Technician will do. That activity has an average duration. Activity is used to track what type of work an engineer / technician is doing for a job. A job can have multiple activities.

Documents	
o;	Office timings
Configuration	Area
1 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties
	Form - Categories
	Form - List Items

- 1. Go to **Configuration > Job Activity Type List**.
- 2. To add activity type then click on the "Add" button.
- 3. The General Settings tab is opened by default. Here you have to enter **Activity Name** and **Average Duration** (in minutes) as mandatory.
- 4. Enter Fields as follows:

O Activity Name : Here you can enter Activity Name like Installation, AMC Visit etc.

• Average Duration (in minutes): Here mention an estimated time duration (in minutes) typically required for the activity. For example to Install one CCTV camera it can take 30minutes.

• **Department**: Assign a Department from the drop down list.

• Status: Choose a Status as Active/Inactive.

• Add on Device: Keep this feature as "ON".

• **Overlap**: It allow you ti decide if one activity can overlap with another ongoing activity. If kept as "**ON**" while scheduling any job, it will allow 2 activities to continue on same time. If kept off, only one activity can be assigned to an Engineer/Technician at a time.

• **UI Colour**: Choose an activity color to mark in pie chart reports.

• Add Form: Here you can select and attach multiple forms to the activity. Eg: You can add Customer Feedback form, Job Checklist to an activity.

• Add Pre-Task:- Here you can select multiple pre-task categories.

5. After entered the Activity Name and Average Duration, turn "ON" Add on Device feature

and select a **UI Colour**, then click on the "Add" button.

6. It will display the "Activity type added successfully" pop-up screen, click on the "OK"

Button.

For technical support contact: support@fissaramanage.in

Site Type List:

Site Type means the type of sites like IT industry, Textile Industry, Chemical Industry, etc. It is just a name that will use for filter sites depend on their types while downloading sites from the server. Here you can create site type depends upon your choices.

Manage Site Types		_
+ Add 🕼 Edit		
		Search:
Name \$	Description \$	Categories \$
Office	Office space	
Restaurants	Restaurant / Hotel	
Shop	Shop, Gala, Retail outlet	
		View 1 to 3 of 3

To add Site Types:

1. Go to Configuration > Site Type List.

Documents	
O ^o	Office timings
Configuration	Area
🏩 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties
	Form - Categories
	Form - List Items

2. To add a new site type, click on "Add" button.

An Add New Site Type popup screen will be shown. Here you have to enter the Site Type Name and short description. Click on "OK" button to save.

	Add New Site Type	×
	Name: *	
	Residential - Flat	
	Description:	
rip	Flat, Apartment	c
e s		
au	ා Car	ncel 🗙 OK
, G	Sala, Retail outlet	

Site Properties:

Here you can mention additional information or notes about any site.

To add a new tab, use left navigation menu to go to **Configuration > Site Properties**.

Documents	
O\$	Office timings
Configuration	Area
🛓 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties
	Form - Categories
	Form - List Items

1. To add category then click on "Add Category" button.

Manage Site Propert	Add New Site Property Category 🛛 🖉		
Providence and the second	Name *		
A surrounder	Payment Follow Up		
	Description:		Search:
Category Name	This category will maintain Payment follow Up tab.	4	No. of Properties.
category testing			0
Commercial site	9.04 Barriel # 04		1
Daity Farm	A Farm for Likery cown		5
Dento Property			3
Gange	Garage condition		4
Medications			3
New Ste Property	New site property for testing		2
Properties	Common properties for all sites such as access information		4
Reference Number	Sea Reference		1
Residential	Private, Landlord or Council Owned properties		3
	< (Page 1 of 2 > > 25 +		Wew 1 to 10 of 16

2. It will display Add New Site Property Category popup. Here enter the **Category name** and **description**.

3. A success message will be shown and Edit Site Property Category page. Here you can add Property Definition (Attributes and its text field). If you want to add property then click on the "Add Property" button. You can click multiple times on the "Add Property" button for multiple properties.

ர்ssara**manage**

dit Site Pr	operty Category Category	Manage Site Properties.			
ame: *	Payment follow Up				
iscription.	This category will maintain Po	iyment fuilow Up tab.			
no property to a	Il Stes:				
no property to a roperty Defini Name *	If Sites: B COOKS > Drag and shop to re-order Poyment Due Date	value Type *	Text	,	

- 4. It will display Property Name, Value Type field, Edit icon and cancel icon for every property. Auto Property to all sites means if its checkbox is selected then this property category will add to all sites automatically. If you want to remove property before saving then click on cancel icon.
 - N means Not Viewable on-device.
 - V means Viewable onDevice
 - E means Editable from device
- 5. Here I added two properties and its value type. Then I chose V viewable on Device option. Then click on the "Save" button.
- 6. A Success message will be shown. Here you can edit the site property category as well as edit property definitions. If you want to return to Manage Site Properties page then click on the "Return To Manage Site Properties" link.

Form – Categories:

It is a label for the **Form Category**. In case of multiple forms, you can add custom names or labels for the forms here. Eg: Customer Feedback Form, Report Form, Survey Form, etc.

Documents	
O\$	Office timings
Configuration	Area
1 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties
	Form - Categories
	Form - List Items

To Add a new Form Category:

1. Go to Configurations > Form - Categories. It will show the Form Categories page.

Manage Form Categories		
+ Add a Category		
		Search Q
Category Name ¢	Description	Actions
Feedback Form	Test	/ 8
Check list form	test	/8
Sample Form	test	/ 🕯
Installation		/ 8
۵۵	Page 1 of 1 >> >>>> 10	View 1 to 4 of 4

- 2. To add a new Form Category, click on "Add Category" button.
- 3. Create Category page is opened. Here enter the Category Name and a short Description. Click "Save" button.

reate Category < Return To Form Catego	ries	
Name	Customer Feedback form	
Description	Customer Feedback form for AMC team	
		← Back to Categories El S

4. A success message will be shown - "Success! Category created successfully" message and newly added record will be show in the list on Form Categories page.

Form – List Items

These are lists shown while creating custom form. Within Forms you can choose one of these lists to build your input fields.

Manage Form List Items		
+ Add a List		
		Search Q
Name ÷	List items	Actions
Yes/No	No , Maybe , Yes	1 🖻
		View 1 to 1 of 1

1. Go to **Configuration > Form – List Items**. It will display the list items page.

Documents	
¢°	Office timings
Configuration	Area
1 Bulk Upload	Region
	Job Activity Type List
	Site Type List
	Site Properties
	Form - Categories
	Form - List Items

2. To add a new list, click on "Add a List" button. On next screen add a label for **List Name** and in the **List Items** type options you want to show in the list. In the List Items box, to add multiple labels, type a label name and press enter.

Create a List Item Set < Return To List I	tems	
List Name	Yes/No	
List Items	Yes x No x Maybe	
		🔶 Back to List Items 🖺 Save

- 3. Click "Save" to save the List Item.
- 4. If you want to delete any List name and its items, click on the delete icon of row / record.
- 5. It will display "Success! List removed successfully" message and remove the list with list items.

Bulk Upload

To import **Sites** data using an excel file, use the Data Upload feature.

- 1. Use the left menu to go to **Bulk Upload > Data Upload**.
- 2. Click on the **Site Upload** tab.

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Data	Up	load	0
			$\mathbf{\overline{\mathbf{U}}}$

Jpload	Project Upload	Maintenance Job Upload	Asset Upload	Site Upload						
npo	ort Data									
)own	oad Sample Temp	ate							Download Ten	nplate
Have a	file to upload ?		Sites 🗸		Click to choo	se		Choose	Upload Site Da	ata
F	ile structure for Sit	es								~
	iles that are recen	tly uploaded								^
N	ame		Ву		0	n	Status			Action
					No data available in table					
						75 ¥				

 Click on blue Choose button to select an excel file from your computer, and click on the Upload Site Data button.

Li site_upload (2)f.xlsx Change 🚺 Upload Site Data	site_upload (2)f.xlsx	Change 😢	Upload Site Data
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4. Status of file upload progress can be seen in the "Files that are recently uploaded" tab.

Logout:

- 1. Click on the Upper right corner of the screen there will be a **Welcome** (Your Name) dropdown displayed. Click on the dropdown button.
- 2. A Logout link will be shown. Click on Logout.