OfficeSync

by MicroSurvey

Manual Version 1.1

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Technical Support

MicroSurvey Software Technical Support is available to help you get the most out of your OfficeSync product. The following information explains how to prepare for your call so that your inquiry can be answered promptly and accurately.

Please prepare yourself before you call for Technical Support

Take a few minutes before you place your call to check the printed documentation and the online help files to see if the answer is already at your disposal. Our Web site on the Internet can also save time. Please check it periodically if you can for software updates. To provide better assistance, be prepared to provide the following information: Hardware model, version of the program, and your Technical Support Number.

Please make sure that you have all the steps you completed prior to your problem and can explain them to the technical support representative. We may ask that you forward a copy of your data to us if we cannot find the problem immediately.

MicroSurvey offers a 90-day complimentary support period to all of our registered users, starting the date of purchase. Introductory support is available weekdays between 8:30am and 5:00pm (Eastern Time) and between 8:00 am and 5:00pm (Pacific Time) - Monday to Friday excluding holidays.

Yearly Support

For clients who have had their original 90-day complimentary support period expire and feel that they will need on going support over the next year, we have a Yearly Support Contact option available. This gives you the ability to contact us for technical support, as much as you require, and you pay a flat fee once a year. This option is not to be used in place of training but is to assist you on the occasions when you really need it. The charge for the Yearly Support Contract is to be billed and paid for prior to the support commencing. This rate is subject to change, call for current rates.

Electronic Support

MicroSurvey maintains and provides at no charge, our Internet Web site at the following address: www.officesync.com

This web site has sections on frequently asked questions, Technical Notes, Technical Specifications, and as required, free updates and program fixes, along with a lot of other helpful information.

Training

MicroSurvey Software, Inc. can provide training to you, in your office or in a classroom situation (where facilities and numbers allow). MicroSurvey has training staff that will travel to almost anywhere and provide you with the professional skills you require to operate your MicroSurvey program. Please feel free to call and ask for a quotation or inquire about potential classroom situations. Your local dealer may also be able to setup or arrange a training session for you. Contact our head office for more information about training

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Getting Started

Introduction

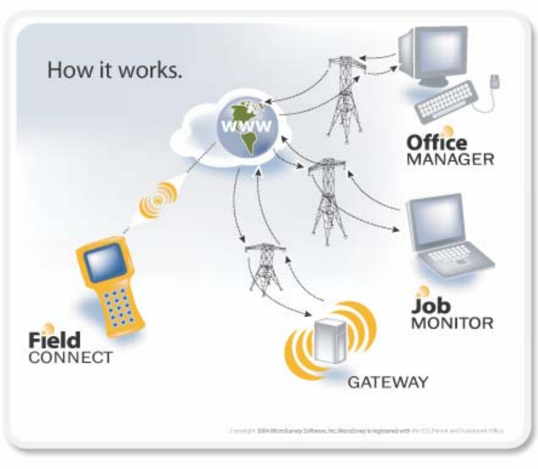
OfficeSync is a convenient and reliable wireless data transfer technology used by people in the mobile workforce, such as land surveyors, contractors and project managers.

OfficeSync instantly transfers any data files, *of any size,* between the jobsite and any computer in the office, or anywhere else in the world.

In the office or on site, using OfficeSync is as easy as:

1. Choose your file(s)
2. Select the destination
3. Click ***Send***

The OfficeSync software automatically creates a wireless connection to the Internet and transfers the selected files to the ***Gateway***. The Gateway is a central server and Interagent that manages all uploads and downloads, routing job data between authorized field personnel and their offices. The Gateway is located in a secure data center in the USA.



OfficeSync has three integrated software components that work together to send and receive files via the Gateway:

- ***Field Connect***
- ***Job Monitor***
- ***Office Manager***

OfficeSync Software Components

Field Connect is an easy to use application that installs on most PDAs and data collectors used by field personnel. It automates the transfer of files to and from the OfficeSync Gateway. Field Connect is designed to work both online and offline, so you can login and prepare files for transfer whenever it is convenient. If cellular service is interrupted, Field Connect will re-establish the connection and resume file transfer automatically. The auto-upload feature enables hands-free data transfer, which is useful while driving.

Office Manager is the central component of OfficeSync and can be installed on any PC connected to the Internet. It contains all the administrative tools needed to manage data transfers to and from the jobsite. Office Manager is used to create new jobs, crews, devices and manage users. It includes a reporting feature that allows the administrator to view all activity in the system, by customer, crew, priority or location.

Job Monitor is a software component for non-administrators who only need to send and receive files from their desktop. It provides real-time monitoring of the OfficeSync Gateway so when files are sent, Job Monitor issues a pop-up notification. Users have the option to accept delivery of the new data, or wait until later. On acceptance, Job Monitor will download the files and remove them from the Gateway. Job Monitor can be configured to work as either an Office or a Field computer.

How OfficeSync Works

The OfficeSync Gateway

The Gateway is the hub of the OfficeSync data transfer service. It is a database and Interagent that routes data files between users in the field and the office. Office computers can be located anywhere in the world, as long as they have access to the Internet. There are no limitations on how many fixed or mobile users there can be in an OfficeSync account, as all application data is stored on the Gateway.

Any Size File Transfers

Files of any size can be transferred using OfficeSync so you can send large DTMs or drawing files to survey or construction crews in the field with confidence. Unlike email, there are no full mailboxes or rejected attachments. Each OfficeSync service plan includes a set amount of data capacity measured in Megabytes (MB). Files are automatically compressed to maximize the amount of data you can send. If data throughput exceeds the monthly plan, an additional charge of a few cents per Kilobyte (KB) will be billed to your OfficeSync account. Plans can be upgraded at any time to avoid overage charges. Please refer to current plan rates for details.

Infrastructure

The OfficeSync wireless data service includes all supporting software and communication hardware. There is no requirement to have an existing cellular voice or data plan to use our service. OfficeSync modems operate on the Verizon network in the United States and the Telus network in Canada. Both networks employ a digital “1x” CDMA infrastructure, providing the fastest transfer speeds and the most widespread coverage available.

Sending and Receiving Files

Whether you are in the field or in the office, the process of sending or receiving files is essentially the same.

- Select the file(s) to send and then click the ***Send Data*** button.
- If you are receiving a file, you click the ***Get Data*** button then select which folder to save the file(s) to.

It really is that easy. OfficeSync was designed for ultimate convenience and reliability. In fact, there is nothing like it on the market today.

Multiple Field Users

If there are multiple users in the field, how does OfficeSync know which person to send the file to?

- When a file is sent from the office, it is sent to a particular Field Crew.
- When a field user logs into Field Connect on their mobile device, OfficeSync knows which crew they are a member of.
- When they click the Get Data button, the Gateway uploads any pending files for that crew to the device that crew member is logged in to.

Each user of OfficeSync is assigned a **User ID** and a **Role**. The roles serve to identify field users and office users. Users can have multiple roles

Automatic Data Upload

When files are selected for upload or download, Field Connect automatically manages the connection to the cellular network, the Internet and the Gateway. If for some reason the connection is lost during a file transfer, Field Connect will pause, re-connect and resume the transfer. There is also hands-free **Auto Upload** feature which checks the Gateway at regular intervals and automatically uploads any pending files without requiring user action – a convenience while driving.

Terms and Conventions

Throughout this user guide, there are references to certain actions, icons and terms that are defined in this section.

User Interface Actions

 **Save & Exit** – Saves changes and closes the screen

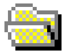
 **Cancel & Exit** – Discards changes and closes the screen

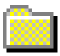
 **Apply** – Saves changes without closing the screen

 **Next** – proceed to the next step or screen

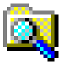
 **Previous** – Return to previous step or screen

File Selection Options

 **File** – Select individual files, using File Explorer

 **Folder** – Select all files in a folder, using File Explorer

 **Remove** – Remove selected files from a list

 **Browse** – Open File Explorer

Terminology

Upload

When files are sent from the Office to the Field, it is called an Upload.

Download

When files are sent from the Field to the Office, it is called a Download.

Roles

There are four distinct roles in the OfficeSync application. Roles are assigned to users in the Logins area. Roles grant certain rights as described below. A user can also have multiple roles.

Administrator

- The Administrator role will allow the user to access the OfficeManager and JobMonitor applications.
- Has the ability to edit and create new Logins (Users)
- Has the ability to activate and de-activate records
- Only administrators will be able to view or edit de-activated records

Field User

- Field Users must belong to a Field Crew
- Only users assigned to a Field Crew will be permitted to log into the Field Connect application (mobile devices).

Job Manager

- The Job Manager role will only allow the user to access the Job Monitor application

Office Manager

- The Office Manager role will only allow the user to access the Office Manager and Job Monitor applications.

Workflow

OfficeSync was designed with project management processes in mind. Therefore all files that are transmitted back and forth are associated to a specific Customer and Job. The job context is helpful for companies that need to keep track of the ongoing transfer of original construction documents between field and office. OfficeSync is designed to make managing the flow of information easy on many concurrent projects. Or, you can use Simple Mode to transfer files without associating them to a specific Customer or Job.

Prerequisites and Setup

Any file that is sent to a field crew must first be associated to a Job, and the job needs to be associated to the Customer before that. (If you choose to use Simple Mode, then these two associations are not required.)

But before any files can be sent:

- The Crew(s) must first exist in the system,
- Then users of OfficeSync need to be created, and assigned to crews where applicable

User setup is done in the beginning and then it doesn't need to be edited again until there is a change in the persons using the OfficeSync application.

The order of data creation in OfficeSync is as follows:

1. Enter crew names
2. Create user logins, assign field users to crews
3. Create devices (optional) and assign devices to crews
4. Enter names of current customers (optional)
5. Create Job names for each customer (optional).

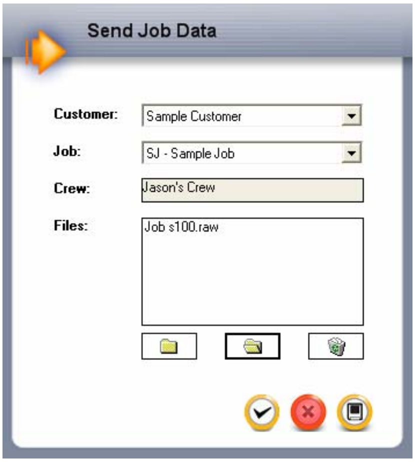
Using Simple Mode

Not every file that may be sent back and forth will be specific to a particular customer or job. In cases where you just need to quickly send a file, use Simple Mode to bypass that selection. Explicit crew assignment is not required for files sent from the field to the office.

Quick Send

To quickly send a file from the office, just use the “Simple Mode” option:

Open the Send Job Data screen in either Office Manager or Job Monitor



Ensure that there is a checkmark in the “Simple Mode” option.

Select the Crew you wish to send the files to.

Choose the file(s) to Send

Click the  button to start the transfer.

Job State Transitions

All jobs begin in a *New* state and transition through four additional states during the normal life cycle.

- When a Job is assigned to a crew, using **Assign Jobs**, the job state is changed to *Assigned*.
- When a Job is uploaded to the Gateway, using **Send Job Data**, the job state is changed to *Open.*
- When the Field Crew uploads (gets) a job from the Gateway, the job state is changed to *In Progress*.
- When a job is considered finished, the job state can be manually set to *Completed* using **Edit Job**.

Jobs can also be set to a state of On Hold or Cancelled.

Using Office Manager

Office Manager is the OfficeSync administration application that is used to create and manage system users, crews, jobs, customers and devices.

When your OfficeSync account is activated, an Account number, User ID and Password for the administrator will be provided. The first time you log into OfficeSync you will need to enter all three then click Enter.

The account number will not need to be entered upon subsequent logins.

Checking the Remember Me option will remember your User ID and Password so they will not need to be entered upon subsequent logins.

After login, the main OfficeSync interface displays with the Jobs Area as the default page. The buttons down the right hand side correspond to the areas within Office Manager, namely:

- Company Info
- Crews
- Devices
- Customers
- Jobs
- Logins

The Logins button will only be displayed for users that have an administrative role.

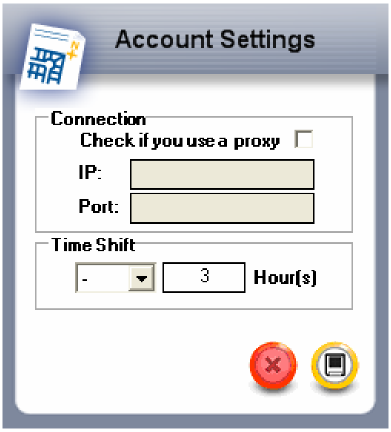
Company Info

This area contains details about your company such as contact info and the date of activation. It also includes your unique OfficeSync account number.

You can edit your company's contact info by clicking on the Edit button which displays the following screen:

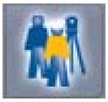
Editing Company Information

Settings



If you connect to the internet through a Proxy server, then set its IP and Port here.

The Time Shift is used to convert times in the Job Reports from Eastern Standard Time to your local time. If N/A is set, then no shift will be applied, and the times reported will be in EST.

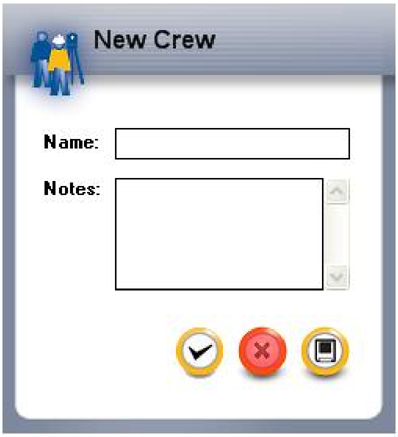


Crews

Each of your field crews must be named before you can assign them to a particular job.

Click the **New Crew** button to add a new crew record.

Adding a New Crew



Enter the name of the new crew in the Name field and add a note if desired.

Click the Save button to create a new record or click the Cancel button to close the screen without saving.

Editing or Deleting Crew Information

In the event that the name of a crew needs to be changed, click on the Edit button

Select the crew from the pull-down list then change the name in the Name field. Click the Save button to save changes, or click the Cancel button to close the screen without saving.

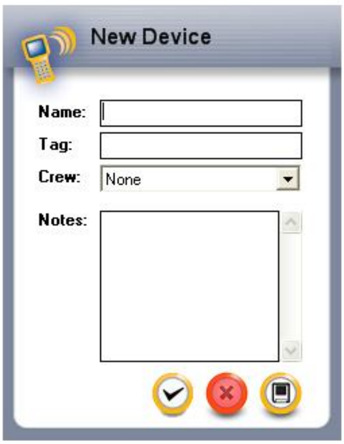
To completely delete the listed Crew, press the Delete button.

Managing Devices - Optional

OfficeSync includes an optional area for device management which helps you keep track of which devices are deployed in the field. Each device is assigned to a crew.

Devices can be re-assigned to different crews at any time.

Adding a New Device



Enter the **Name** of the new device in the Name field. Use the **Tag** field to record the serial number of the unit, or another identifier. From the drop-down list, select the **Crew** that is assigned to the device.

Click the Save button to create a new record or click the Cancel button to close the screen without saving.

Editing or Deleting a Device

Press Edit if you need to change any information related to a device. Select the device to edit from the dropdown list, then make your changes. Click the Save button to create a new record or click the Cancel button to close the screen without saving.

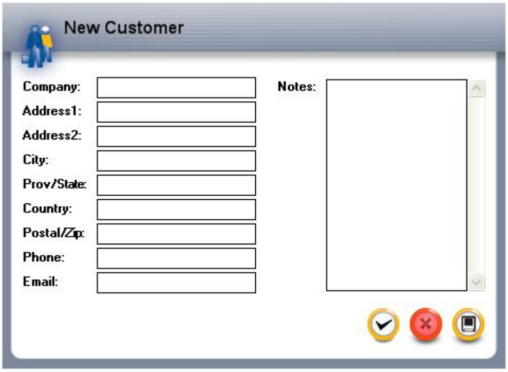
Click the Delete button if you want to permanently delete this device record.

Managing Customers - Optional

Customer information is managed in OfficeSync so that you can associate specific **Jobs** to a **Customer** or project.

This makes it easier to manage uploads and downloads when tracking multiple jobs and crews as well as providing additional context for reporting.

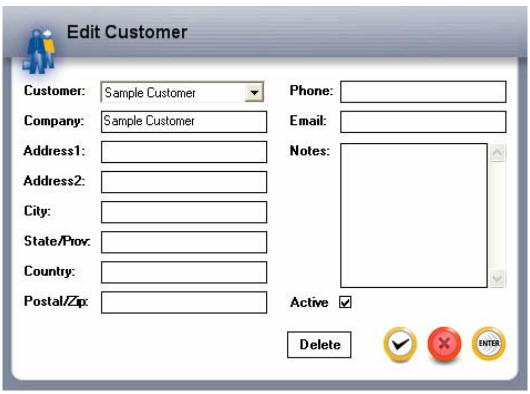
Adding a New Customer



Enter the **Company** name of the new Customer. The remaining fields are optional.

Click the Save button to create a new record or click the Cancel button to close the screen without saving.

Editing or Deleting a Customer



Edit the customer information as required.

Click the Save button to create a new record or click the Cancel button to close the screen without saving.

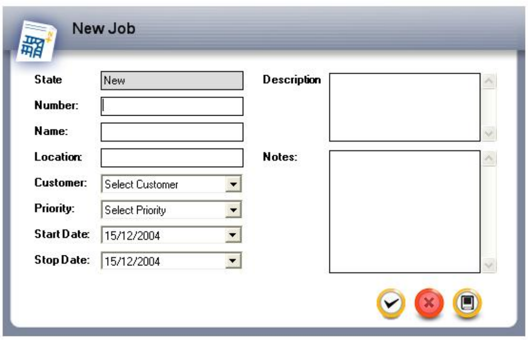
Click Delete to completely delete the currently selected customer.

Managing Jobs

The Jobs area in Office Manager allows you to:

- Associate jobs to a customer
- Assign jobs to a crew
- Send job files to crews
- Retrieve job files from crews
- Run reports
- Delete job files that crews have not yet retrieved

Adding a New Job

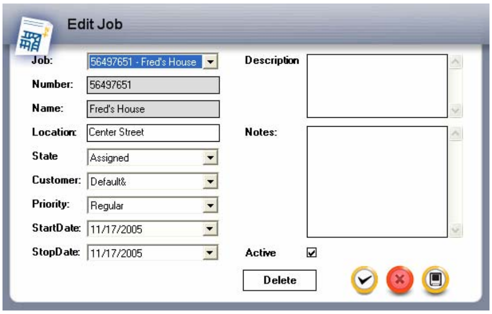


Click the New Job button

- Enter the new Job Number, Name
- Enter the Location of the work.
- Select the Customer from the list
- Choose a Priority Specify Start and Stop dates for the job.

- Include a description and additional notes if desired. The Start Date and Stop Date are used in the Job Reports section (See page 27) to filter jobs based upon their schedule for completion, and to determine the time remaining for jobs in progress.

Editing or Deleting an Existing Job



You can edit existing Job details by selecting the EDIT button on the Jobs page.

Note: You will not be able to change the Job Number or Name once it has been created.

Press Delete to delete the currently selected Job.

Assigning Jobs

Jobs need to be assigned to a crew prior to sending files. When a new job was created in the previous step, it was associated to a customer. When you assign a job, you begin by first selecting the customer, then choosing which of the customer's jobs to assign to a crew.

- Select the Customer from the drop-down list.
- Select the Job to assign.
- Select the Crew for the job from the drop-down list

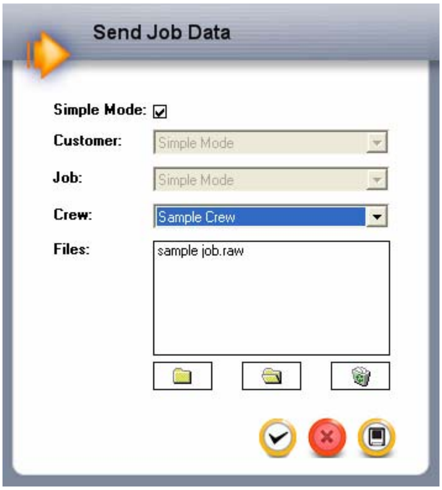
If the Job is already assigned, the name of the assigned crew will display. A Job can be re-assigned to another crew

Sending Job Data to Field Crews

The file(s) selected will be transmitted (copied) from your computer to the OfficeSync Gateway. The files will remain on the Gateway until they are uploaded by the assigned Field Crew.

Click the Send Job Data button on the Jobs page.

There are two modes you can use, Simple Mode or Advanced Mode.



To use Simple Mode, check the Simple Mode option, then:

- Select the Crew
- Choose the files to send

Or to use Advanced Mode, uncheck the Simple Mode option, then:

- Select the Customer
- Select the Job. (the pre-assigned crew will automatically populate).
- Choose the files to send

Use the  button to load all files from the selected folder.

Use the  button to add individual files to be uploaded.

Use the  button to remove selected file(s) from the list before sending.

Click the Save button to initiate the upload, or Cancel to return to the Jobs screen.

OfficeSync will immediately begin the upload process. A progress bar will display at the bottom of the screen while the file is uploading.

While the job is being sent, you will see the  button in the top-right corner of the screen. Press this to abort the transfer if you need to cancel the transfer (for example, if you picked the wrong file to send).

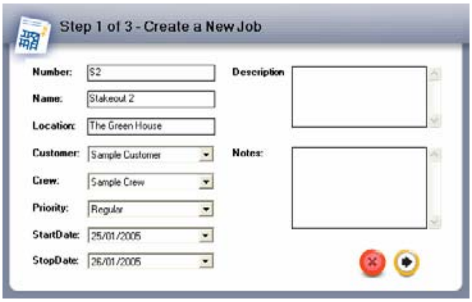
When complete, a confirmation message will be displayed.

Job Wizard

The Job Wizard takes all of the previous steps and combines them into one convenient process. The Wizard is used when there is currently no job created and the files are ready to send.

NOTE: The Customer and Crew must already exist in the database before using the Job Wizard.

Step 1 of 3 – Create a New Job

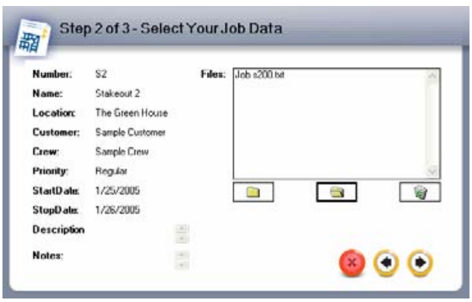


- Enter the Job Number & Job Name
- Enter the work Location.
- Select the Customer
- Select the Crew.

- Verify priority and schedule for completion.
- Add an optional Description and Notes.

Click the button to go to Step 2.

Step 2 of 3 – Select Your Job Data



Use the button to add individual files to be uploaded.

Use the button to load all files from the selected folder.

Use the button to remove selected file(s) from the list before sending.

Click the button to go to Step 3. Click to go to the previous screen.

Job Wizard continued…

Step 3 of 3 – Confirm Your Job Data

If everything looks good, send the data by clicking on the button.

If you need to change anything, click on the button to go back to the previous screen.

OfficeSync will immediately begin the upload process. A progress bar will display at the bottom of the screen while the file is uploading. When complete, a confirmation message will be displayed.

The files are now ready for upload by the field crew.

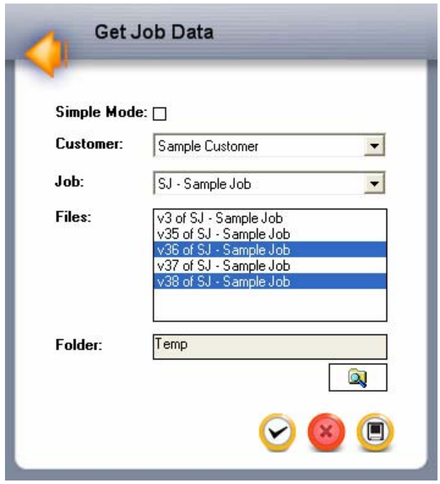
After clicking the OK button, the Job Wizard will return the first screen to permit the creation of another job.

To close the Job Wizard, click the button.

Get Job Data

When crews in the field have completed their jobs, they will send their files to the Gateway using the OfficeSync Field Connect software installed on their data collector. Using the Get Job Data feature in Office Manager, you can check to see if any job data is waiting on the Gateway for download. Just as with sending job data, there are two modes you can use to get job data: Simple Mode or Advanced Mode.

To use Simple Mode, check the Simple Mode option, then:



Or to use Advanced Mode, uncheck the Simple Mode option, then:

- Select the Customer
- Select the Job

OfficeSync will check with the Gateway to see if there are any files awaiting download for the job specified.

The files will appear in the Files window. If no files are awaiting download, OfficeSync will notify you that there is no data pending for that job.

- Select the files to receive (highlighted files will be downloaded)
- Set the folder you want the files saved to.
- Click the Save button.

Job Reports

Office Manager has a reporting feature that allows you to view all of your jobs and filter them based upon various criteria. The following reports are available:

- All Jobs
- All Assigned Jobs
- Jobs on Server
- All Job Data

You can filter each of the above reports by any combination of Customer, Crew, Location, Priority, Date range and Time Remaining.

- Select the Report Type from the list.
- Choose a sorting option by clicking the dot next to the desired category.
- Choose one or more filters by checking the box next to the desired category.
- Select the appropriate value from the respective list(s).
- Click on the Save button to run the report.

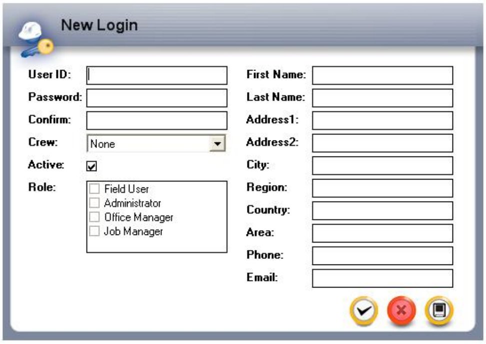
Reports will open in a new window. Reports can be printed or exported to PDF, Excel, Word and RTF format.

Logins

The Administrator of the OfficeSync application can manage the various users of the system and establish their respective roles and access privileges in the Logins area.

To add new users to the system, click the **New Login** button.

Creating a New User



- Enter a User ID and Password.
- Indicate whether the user is a member of a field crew,
- Choose the role(s) for this user.
- Add contact info as desired.
- Click Save to create the user record

Note:

Passwords must be at least six characters in length.

If a user is a member of a Field Crew, the must also have a role of Field User.

Only users that belong to a field crew will be able to log into the Field Connect application.

Roles

Users of the system can have one or more roles. Role assignment controls the privileges for each user. Only administrators will have access to the Logins area. Users with the Administrator or Office Manager role can access both the OfficeManager and JobMonitor programs. Users with the Job Manager role can access the JobMonitor program.

Using Job Monitor

The Job Monitor is a small and convenient application that monitors the OfficeSync Gateway for job data incoming from the field. Job Monitor is also used to send data to the field.

Job Monitor is used by engineers, technicians, draftspersons or others within the office environment who only need to transfer files with the field crews. Job Monitor does not provide any administrative capabilities. Users will not be able to create or edit customers, crews, job details, devices or accounts.

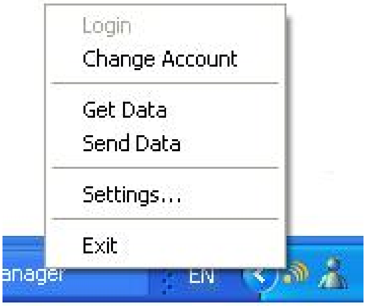
After launching Job Monitor, the following screen will appear:

- Enter your ***User ID*** and **Password**
- Click ***Enter*** to start Job Monitor.

The login screen will disappear and an OfficeSync icon will appear on the System Tray (on the bottom-right corner of the screen).

Right-clicking on the OfficeSync icon in the system tray will display the ***Job Monitor Menu***, as shown here.

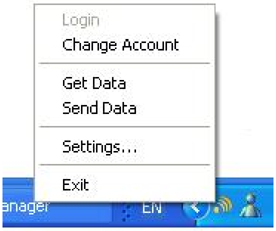
To close Job Monitor, click ***Exit*** on this menu.



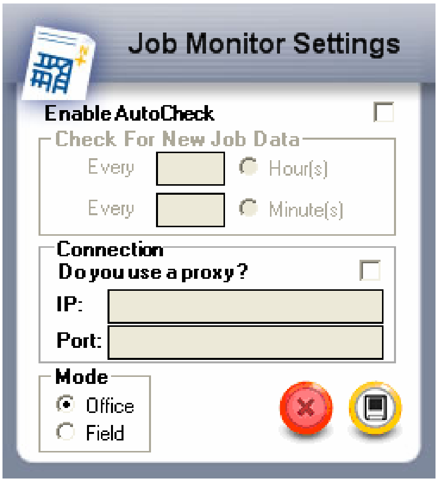
Job Monitor Settings

Job Monitor can be set to automatically poll the Gateway at regular intervals looking for job data posted by the field crews.   This feature is controlled in the Job Monitor Settings.

- Right click on the Job Monitor icon to open the menu.
- Click on Settings…



AutoCheck



- Check the Enable AutoCheck option
- Click the radio button next to Hour(s) or Minute(s) and enter a value.
- Click Save to save the setting.

If Job Monitor finds any data files waiting when it polls the Gateway, a notification will display (similar to an instant message).

If no data is found when the gateway is polled, you are not notified.

You can turn off automatic polling by clearing the Enable AutoCheck box.

Proxy Settings

If you connect your computer to the internet through a Proxy Server, then you can enter your Proxy's IP Address and Port here.

Field/Office Mode

The Mode setting will allow you to use JobMonitor either as an office computer, or as a field computer.

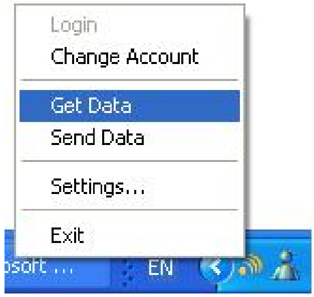
If set to **Office Mode**, then when you send job data, it will be uploaded to the OfficeSync gateway, where it will wait until retrieved by a field crew. Similarly, when you Get Job Data, it will check for any data which has previously been downloaded from a field crew to the OfficeSync gateway.

When set to **Field Mode**, this is reversed, so that JobMonitor can be used on a laptop in the field. If the Mode is set to Field, then when you send job data, it will be downloaded to the OfficeSync gateway, where it will wait to be retrieved by an office user. Similarly, when you Get Job Data, it will check for any data which has previously been uploaded from somebody in the office to the OfficeSync gateway.

Note: When JobMonitor is set to Field Mode, the program still requires an active internet connection. This can be done using the OfficeSync FieldKit. Please see our webpage or contact our technical support department for more information on how to connect your laptop to the internet with the FieldKit.

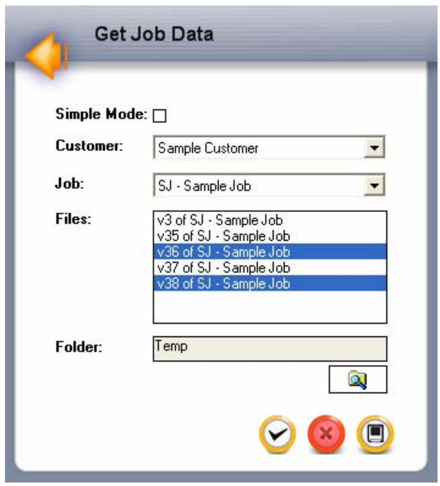
Getting Data

When you click on ***Get Data***, Job Monitor will immediately poll the Gateway to see if there are any new job files that have been downloaded by the field crew.



A notification will display confirming if new job data is available.

If there are files awaiting download, the following screen will display when you click on the notification. Just as with OfficeManager, there are two modes you can use: Simple Mode or Advanced Mode.



To use Simple Mode, check the Simple Mode option.

Or to use Advanced Mode, uncheck the Simple Mode option, then:

- Select the Customer
- Select the Job

OfficeSync will check with the Gateway to see if there are any files awaiting download for the job specified.

The files will appear in the Files window. If no files are awaiting download, OfficeSync will notify you that there is no data pending for that job.

- Select the files to receive (highlighted files will be downloaded)
- Set the folder you want the files saved to.
- Click the Save button.

Version Control

Each time that job files are downloaded, OfficeSync will automatically create a new sub-folder within the folder that you selected. This permits multiple versions of the same files to be transmitted and saved without inadvertently overwriting previous files.

This new sub-folder created will be identical to the name of the job file, and the downloaded files will be copied into that sub-folder.

For example: If the job is called S1 – Stakeout 1, the first files downloaded for that job will be placed in a folder named “v1 of S1 – Stakeout 1”.

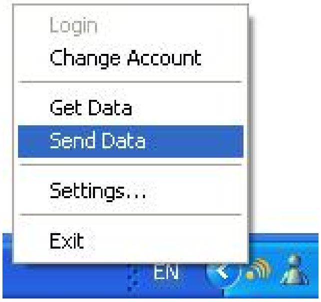
The next time files are downloaded for that same job, they will be placed in a folder named “v2 of S1 – Stakeout 1”

A confirmation message will display when the Job Data has been successfully received.

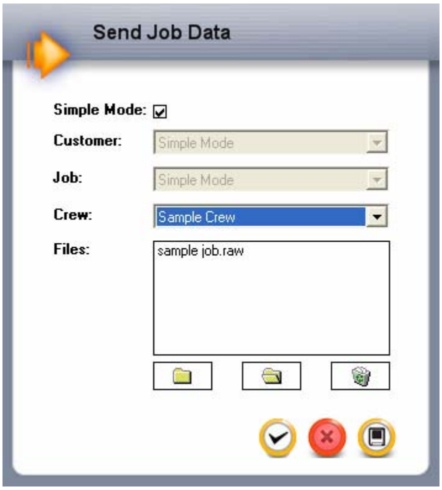
Sending Data

Before you can send data with Job Monitor (using Advanced Mode), the job must first exist and be assigned to the Crew. Job creation and assignment is done in Office Manager. If you are using Simple Mode, then this is not necessary.

When you click on ***Send Data***, Job Monitor will display the same screen that Office Manager uses to send data, and the procedure is exactly the same.



There are two modes you can use, Simple Mode or Advanced Mode.



To use Simple Mode, check the Simple Mode option, then:

- Select the Crew (for Office Mode only. If you are in Field Mode, then this is not selectable).
- Choose the files to send

Or to use Advanced Mode, uncheck the Simple Mode option, then:

- Select the Customer
- Select the Job. (the pre-assigned crew will automatically populate).
- Choose the files to send

Use the  button to load all files from the selected folder.

Use the  button to add individual files to be uploaded.

Use the  button to remove selected file(s) from the list before sending.

Click the Save button to initiate the upload, or Cancel to return to the Jobs screen.

OfficeSync will immediately begin the upload process. A progress bar will display at the bottom of the screen while the file is uploading.

While the job is being sent, you will see the  button in the top-right corner of the screen. Press this to abort the transfer if you need to cancel the transfer (for example, if you picked the wrong file to send).

When complete, a confirmation message will be displayed.

Field Connect

OfficeSync **Field Connect** is used by people at the jobsite to transmit data, to and from the office. Field Connect is a software application that installs on hand-held devices. It is designed to work with any wireless connection available. Use the ***OfficeSync Field Kit***, to get the fastest, most reliable connectivity. Or use your own cellular phone or other wireless network that you have previously configured such as with Bluetooth or a CF Wireless card.

Use our OfficeSync Field Kit

MicroSurvey provides a rugged Field Kit which includes a cellular modem, a cigarette lighter power adapter and serial cable to connect to your data collector. The kit is completely weatherproof and practically indestructible, so your crews can take it anywhere.

With the Field Kit, you don't have to worry about phones or email or anything, it's all included in your OfficeSync service.

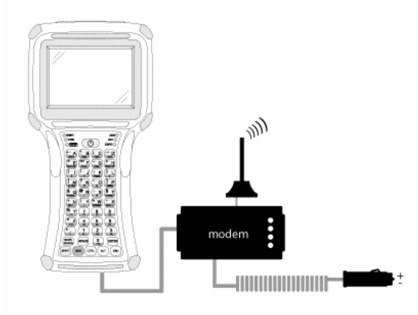
Have your own data-ready cell phone?

The Field Connect software will work with any cell phone that can connect to the Internet. If you use your own phone, data transfer charges will be billed to you by your cellular service provider. Please visit our website at www.officesync.com for more details on the "Use your own phone" plan.

Using Field Connect

The Field Kit setup is quick and easy.

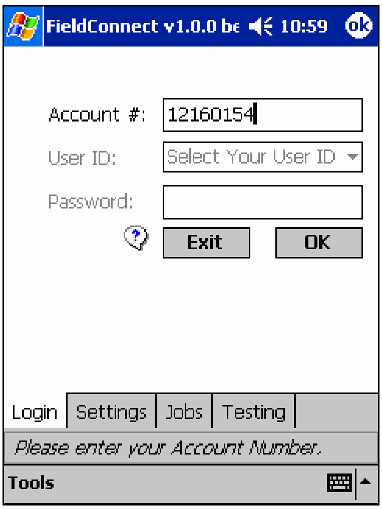
1. Simply connect your device to the serial cable from the modem
2. Plug the modem's power adapter into the cigarette lighter.
3. Launch the Field Connect application.



Logging into Field Connect

If you are launching Field Connect for *the very first time* on the device, you will need to enter your OfficeSync Account number. Your account number is unique to your company.

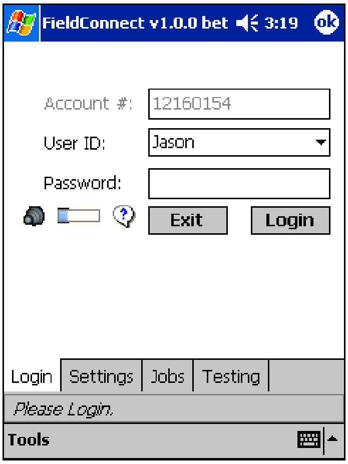
If you are unsure what your account number is, it can be found on the ***Company Information*** screen of the Office Manager application.



- Enter your Account number
- Click ***OK.***

The Account number will now be remembered for subsequent logins.

Login Tab



To Login

- Select your ***User ID*** from the list
- Enter your ***Password***
- Click ***Login***

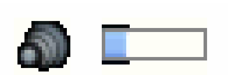
Tip:
Use the *Remember Me* flag in the Tools menu to automatically login each time

Logging into Field Connect identifies the user to OfficeSync as being a member of a particular field crew. When files are sent to the field from the office, they are sent to a particular crew, not an individual.

Any member of a crew can log into Field Connect to retrieve the files sent to the crew.

Service Indicators

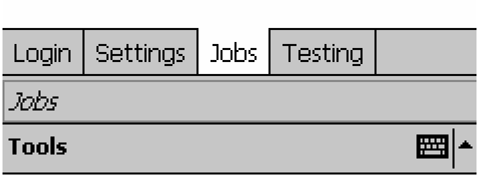
The Login Tab has two service indicators that display the presence of a cellular signal, and the strength of the signal respectively.



Clicking on the signal strength meter will provide a digital reading.

Field Connect Interface

When you have successfully logged into Field Connect you will see four tabbed screens, *or Tabs*, plus a Tools menu. The screen layout is optimized for both landscape and portrait display configurations that are used by various devices.



Tabs

There are four Tabs within Field Connect that organize the various features and options available.

Login Tab

- The Login Tab is where you enter and exit the application.
- Has indicators that display the availability of a cellular signal and the current signal strength at startup

Settings Tab

The Settings Tab is where system options are set:

- Auto Mode – settings for automatic data upload
- Default Folder – where files are auto saved
- Modem preferences - use your own connection

Jobs Tab

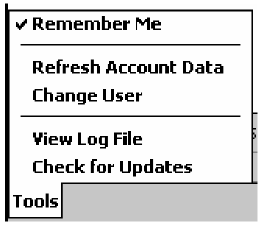
The Jobs Tab is the “Home Page” of Field Connect where data is Sent or received.

- Get Job Data – Receive files from the office
- Send Job Data – Send files to the office

Testing Tab

The Testing Tab is where system logs are created and managed for diagnostic purposes.

Tools Menu



The Tools Menu appears on the upper left corner of the display on CE devices, and at the lower left corner of the display on Pocket PC devices.

Remember Me

Remember Me is a flag setting that, when enabled, will bypass the login process upon startup. This is useful if the device is typically used by one person. When Remember Me is enabled, a check mark will appear next to it.

Refresh Account Data

Refresh Account Data clears the login screen but will retain the last account number as the default. Selecting OK reloads the data for that account, including the user list.

If a contract surveyor was doing field work for two different survey firms, and both companies used OfficeSync, he could send files to either company by changing accounts. He would also need to be entered as a user in both accounts.

Change User

Change User allows you to login to Field Connect as a different user without having to exit the application. If the Remember Me flag is enabled when changing users, Field Connect will automatically switch the default user to the active user.

View Log File

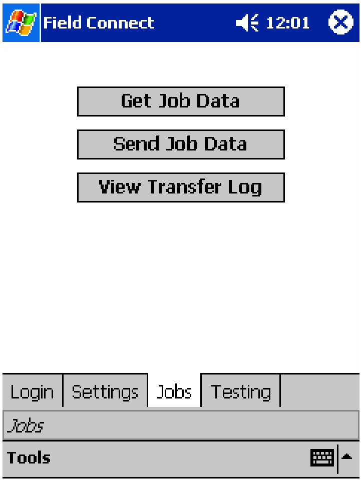
Opens the Log File for viewing. Additional log file controls are located on the Testing Tab.

Check for updates

When new versions are released, you can automatically update your Field Connect software.

Jobs Tab

The Jobs Tab is where you send and receive data files:

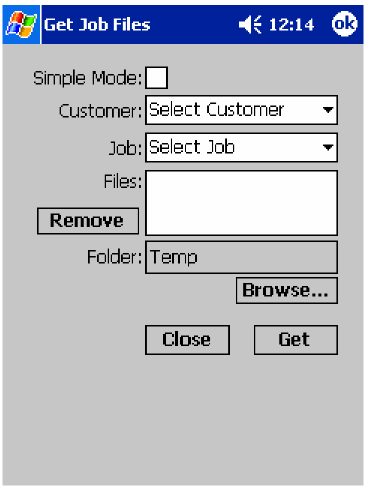


- To retrieve data files that were sent to your crew, select ***Get Job Data***
- To send data to the office, click the ***Send Job Data*** button.

When either button is selected, Field Connect will communicate with the Gateway to get updated data. The modem or user-defined connection must be Online.

To view a log of what files have been sent or received, click the ***View Transfer Log*** button.

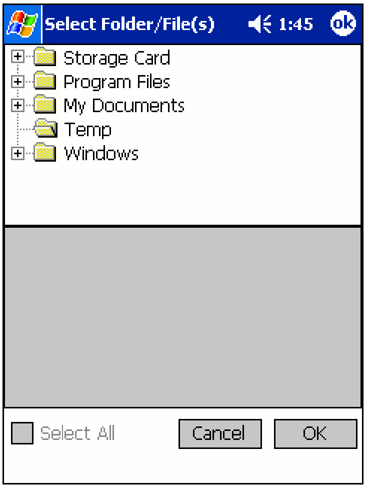
Get Job Data



This is the **Get Job Data** screen:

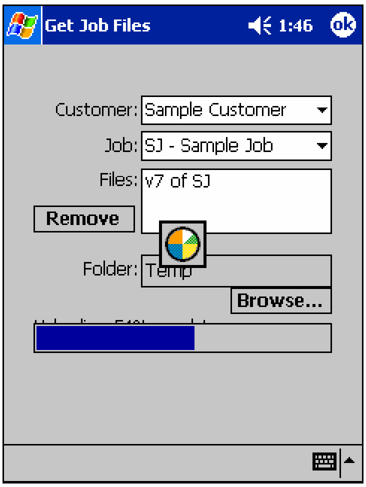
- Turning on Simple Mode will bypass the Customer and Job selection, to easily receive files which have been sent in Simple Mode.
- The Customer list will display those that have data waiting for upload.
- The Job list will show jobs that have data to upload.
- The file(s) to upload will appear in the window.

Click on the Browse button if you wish to specify a different folder to copy the uploaded files to on your device.
The file browser window opens to the Default folder



- Choose the folder on your device where you wish to upload the selected files.
- Click ***OK*** when finished.

The selected files will be copied to the folder specified on the device. Field Connect will create a job subfolder with the same name as the job files with the version number as a prefix. (ie: v1 of S1 – Stakeout 1)



- Click the ***Get*** button to begin uploading files.
- A message will display when the upload is successful.

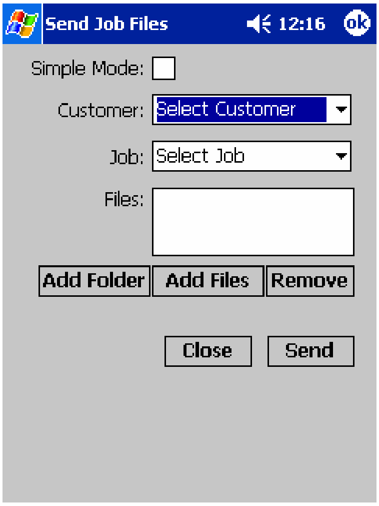
After successful upload, the files are removed from the Gateway

Note:

If the transfer is interrupted due to a temporary loss of cellular service, Field connect will attempt to re-connect automatically. When the connection is established, the file transfer will resume where it left off.

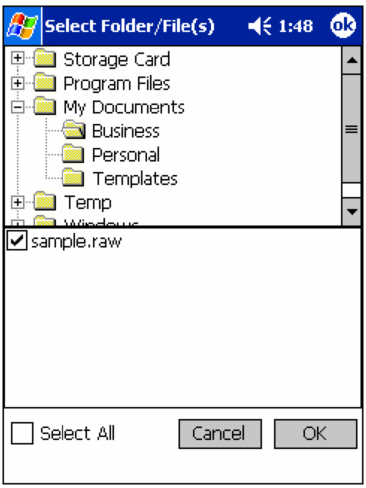
Sending Job Data

This is the **Send Job Data** screen

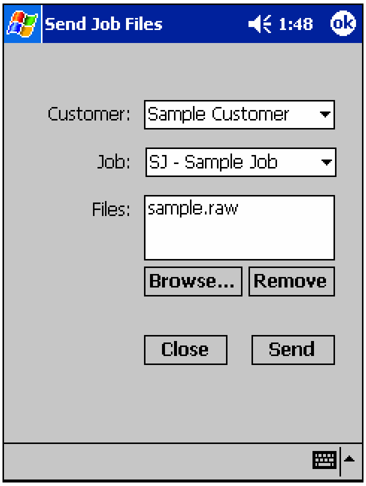


To send a file:

- Turning on Simple Mode will bypass the Customer and Job selection, to easily send files without associating them to a Customer or Job.
- Select the ***Customer*** from the drop-down list
- Select the ***Job*** from the drop-down list.
- Click ***Browse*** to select the files.



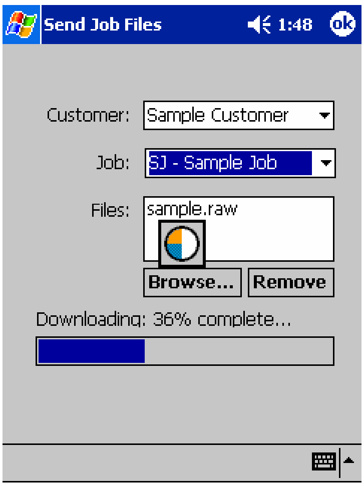
- Navigate to the folder containing the file(s) you wish to send.
- You can select individual files, or check the ***Select All*** box to quickly select all files in the folder.
- Click OK will return you to the Send Job Data screen.



The files listed in the Files window will be sent.

If there is a file in the list that you do not want to send, it can be removed from the list by highlighting it and clicking the ***Remove*** button. The removed file(s) will not be sent.

- Click the ***Send*** button to begin the file download process.

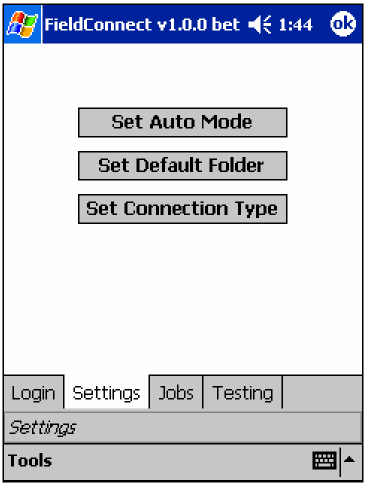


- A message will display to confirm the success of the file download.
- Click OK to close this message

The files are now sitting on the Gateway awaiting download by your office.

Settings Tab

The settings tab in Field Connect allows you to set parameters that control the operation of the program:



- **Auto Mode**
  - Auto Check
  - Auto Upload
- **Set Default Folder**
- **Set Connection Type**
  - Use Field Kit
  - Use other connection

Auto Mode

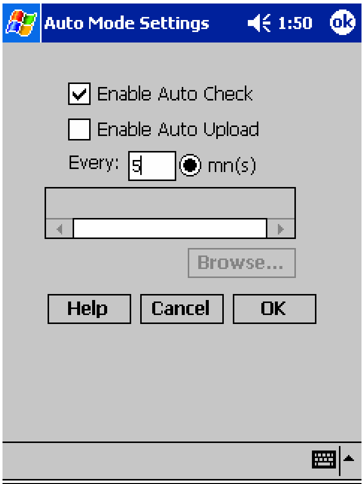
You can have Field Connect automatically check for job data awaiting upload. It can be set to check at regular intervals. If a file is waiting it will notify you, or you can set it to just automatically upload the files without prompting.

There are two options:

- Enable **Auto Check**
- Enable **Auto Upload**

Auto Check

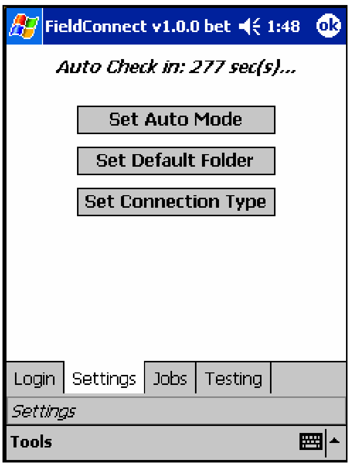
When Auto Check is enabled, the time interval must also be set in minutes. Auto Check will contact the Gateway at each interval to determine if there are any job files waiting for upload for the crew.



To use Auto Check:

- ***Enable Auto Check*** with a checkmark in the box
- Enter a time interval in minutes
- Click ***OK***

The timer begins when you click OK.



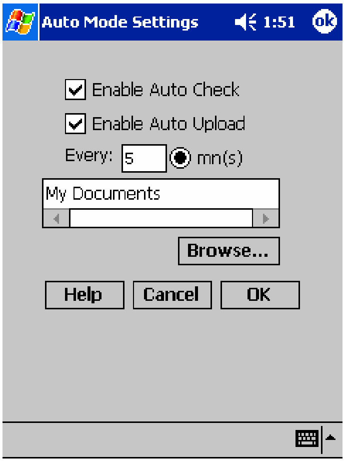
The countdown timer will now display on the top of the screen indicating how many seconds until Field Connect contacts the Gateway.

If Auto Check finds a job file waiting, a message will display to let you know that files are ready for upload.

- Clicking on the message will open the ***Get Job Data*** window.

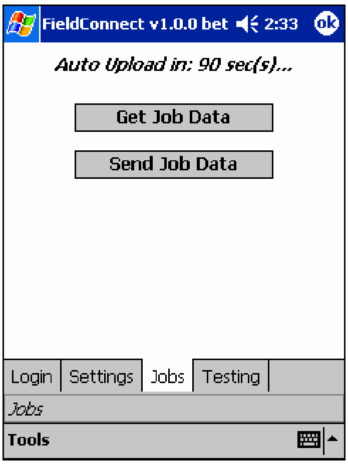
Auto Upload

Auto Upload is a feature of Auto Check. When Auto Upload is enabled, Field Connect will automatically copy the assigned file(s) from the Gateway to the default folder on your device. No further action is required.



To use Auto Upload

- Enable Auto Check
- Set the time interval
- Enable Auto Upload
- Click the Browse button to specify the default folder where the uploaded files will be saved.
- Click OK



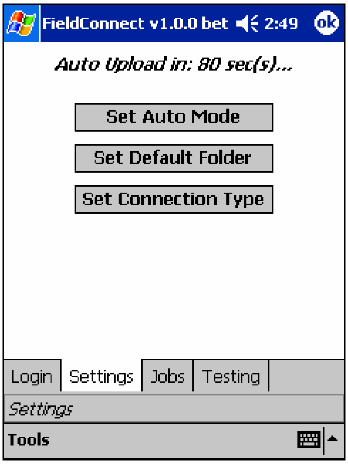
Auto Upload is ideal when you are otherwise occupied, such as while driving or setting up instruments. If you are expecting a file transfer, just set it to Auto Upload every few minutes.

When the file transfer is complete, a message will display on the Jobs Tab indicating that files have been uploaded.

Uploaded files will automatically be copied to the Default folder.

Set Default Folder

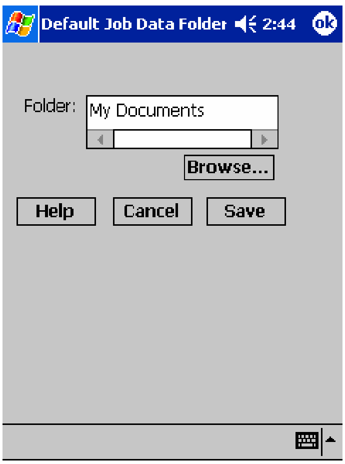
The Default Folder is where files are automatically saved when Auto Upload is enabled. The default folder can be set anytime.



The initial setting is the \Temp folder on your device.

<u>To set the Default Folder</u>

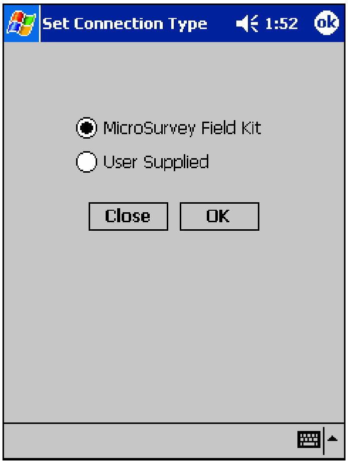
- Go to the Settings Tab
- Click ***Set Default Folder***



- Click the Browse button to select the folder you wish to set as the default
- Click ***Save***

Set Connection Type

Here you can tell Field Connect which option to use for connecting to a wireless network:



- Click on Set Connection Type
- Use the OfficeSync Field Kit
- Use your own connection

MicroSurvey Field Kit

When you use the Field Kit, the Field Connect software automatically establishes a connection to the Internet without any user input or configuration required. The Field Kit is the easiest and most reliable connection option to use. If the connection is interrupted, the software will automatically re-connect and resume the file transfer where it left off

User Supplied

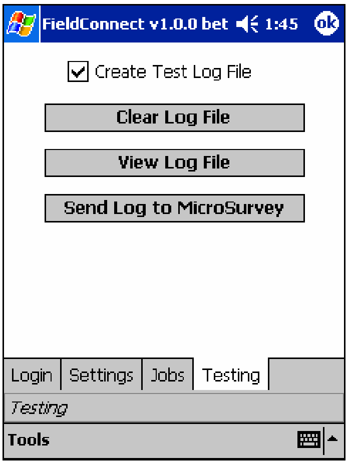
If you have a data-enabled cell phone or some other connection to the Internet available, you can use that connection instead. MicroSurvey can not provide technical support for this option. You will need to establish and monitor the connection yourself. If your connection is interrupted, you may need to re-start the file transfer.

The connection type is set to MicroSurvey Field Kit by default. Please confirm your connection type prior to login if you are using both options with this device.

Testing Tab

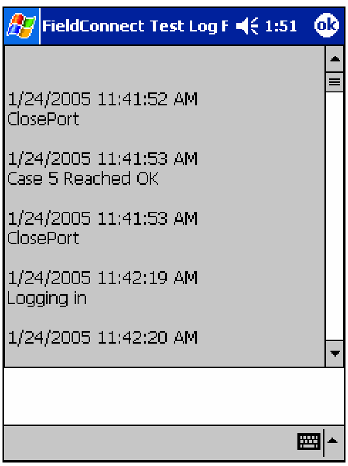
The Testing tab in Field Connect allows you to generate a log file for tech support purposes. The log file will contain diagnostic information that MicroSurvey technicians can use to troubleshoot connection issues or other program functionality.

If you are experiencing issues with using Field Connect, go to the Testing Tab and turn on File Logging:



- Create Test Log File by placing a check mark in the box

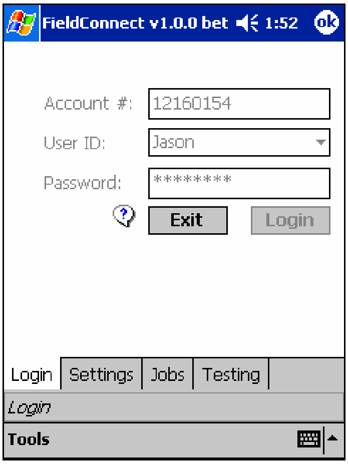
Attempt to reproduce the problem, stopping at the point where you experience difficulty. The log file will be appended as you use the application.



Use ***View Log File*** to see it's contents, but the information recorded is intended to be sent to MicroSurvey's technical support staff for analysis.

To send the file to tech support, click on the button ***Send Log File to MicroSurvey***. Field Connect will find or establish a connection and forward the file to MicroSurvey automatically.

Logging Out of Field Connect



To log out of Field Connect, return to the Login tab.

- Click the ***Exit*** button to logout and close the application.

Options:

Upon exiting, if the ***Remember Me*** flag is set in the Tools menu, the next time that Field Connect is launched, it will automatically log in with the last user. If the flag is not set, then you will be prompted for your User ID and password the next time Field Connect is launched.

New User Login

Don't see new user names in the list?

If you are trying to Log into Field Connect but do not see your User ID in the drop down list, the Account Data probably needs to refreshed. Go to the Tools menu:

- Click ***Refresh Account Data***

The login screen will prompt you to verify your OfficeSync Account number.

- Click ***OK***

The User List will now be refreshed