OSTENDO FREEWAY MOBILITY SOLUTIONS

22 March 2018 - What's New : (Android Play Store Version 593)

1. This addresses some issues reported by Android users that Freeway was shutting down at times when the GPS Tracking was turned on for Style Templates.

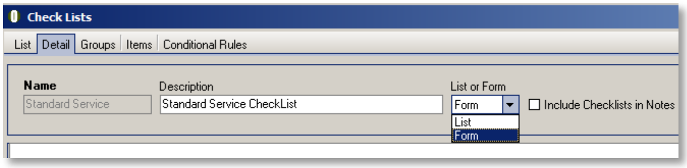
   Below is a download link for users unable to access the Google Play Store

   http://www.ostendo.info/downloads/ostendo/freeway_593.apk

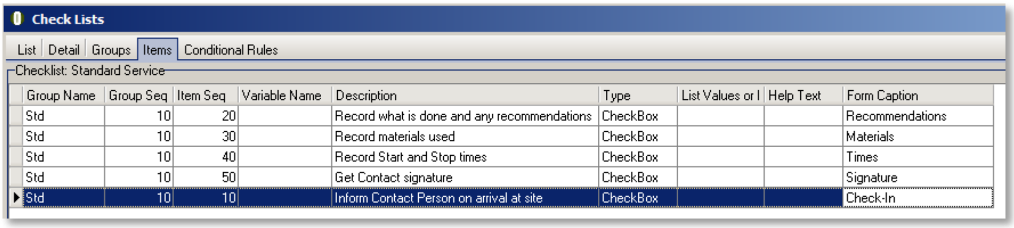
9 March 2018 - What's New : (Android Play Store Version 589)

1. **Mobility Checklists**:

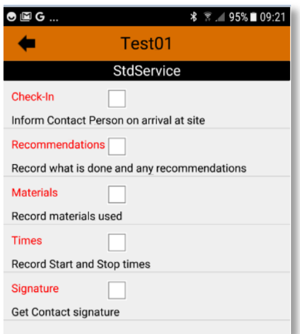
   a. **List / Form** – checklists can now be presented as a simple list or as a form in Freeway.



If Form is chosen, then each item in the checklist can also be assigned a Form Caption (maximum 15 characters).



Group Name	Group Seq	Item Seq	Variable Name	Description	Type	List Values or I	Help Text	Form Caption
Std	10	20		Record what is done and any recommendations	CheckBox			Recommendations
Std	10	30		Record materials used	CheckBox			Materials
Std	10	40		Record Start and Stop times	CheckBox			Times
Std	10	50		Get Contact signature	CheckBox			Signature
Std	10	10		Inform Contact Person on arrival at site	CheckBox			Check-In



b. **Include CheckLists in Notes**:
Ticking this box will add entries associated with any CheckList Item to the Notes field in the job.

c. **Item Types** :
- AssetList – this displays a list of assets belonging to the customer
- Reading – this allows the entry of a Reading value in the checklist
- Scan – this allows the scanning of a barcode from within the checklist

2. **Style Template Types**:

   - **DELIVERYDROPOFF**

     This provides a DropOff Checkbox and a Notes field.

     The DropOff Checkbox is used to indicate whether the item is dropped off (ticked) or not (unticked).

     The notes field can be used to enter any pertinent notes related to the delivery or non-delivery.

   - **PURCHASERECEIPTSLIP**

     This template type allows the entry of the packing slip number of the receipted goods.

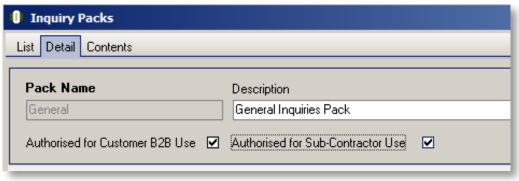
   - **QUANTITIES**

     This template type is used to record quantities for statistical purposes or to keep track of work performed to date.

     The recorded quantities can be set to update statistics of the associated Customer or Supplier / Customer Asset / Customer Asset Readings / Site / Item.

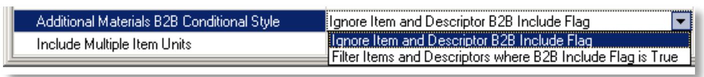
     The Quantity records are linked to specific Descriptors which are defined to collect the required statistical data.

3. **Inquiry Packs** :
   - Authorised for Customer B2B Use
   - Authorised for Subcontractor Use



You can now authorise specific Inquiry Packs to be accessible to Customers or Subcontractors by ticking these checkboxes. The Customer or Subcontractor employee using Freeway must also have this Inquiry Pack assigned to him/her.

4. **Mobility Rules**:
   - **Additional Materials B2B Conditional Style**

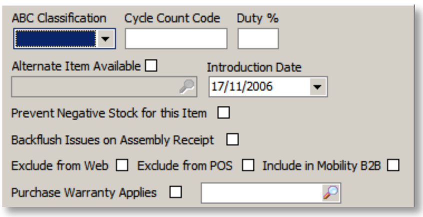


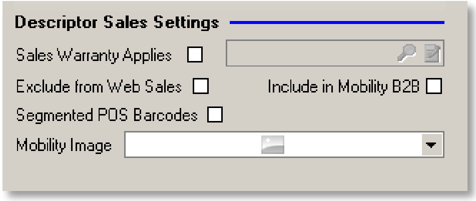
Items and Materials have a "**Include in Mobility B2B**" flag in the Detail screen. For B2B Customers, this rule allows you to expose ALL materials or ONLY materials where "Include in Mobility B2B" is ticked.

   - **Include Multiple Units**

     This checkbox allows you to display multiple Units of Measure (if exists) in Freeway.

5. **Items / Descriptors Detail tab**:
   - **Include in Mobility B2B**
     Tick this box if you wish to specifically make this Item or Descriptor available for B2B Customer selection. This is controlled by the Mobility Rule “**Additional Materials B2B Conditional Style**”.





6. **Descriptor Mobility Quantities**:
   Special Descriptors can be defined to record quantities in Freeway templates for the purposes of measuring productivity rates or capturing quality control data.
   Data that can be recorded through such descriptors include:

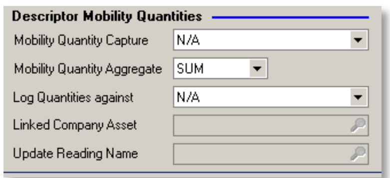
   - **Qty Capture** : this defines the type of Quantity capture:
     Completed Qty Only
     Completed Qty with Time stamp
     Continuous Qty Only
     Continuous qty with Time stamp
     Start Stop Time Only
     Start Stop Time and Completed Qty

   - **Qty Aggregate** : this defines the type of aggregation:
     SUM
     MIN
     MAX
     LAST
     ENTRYAVG (average of all quantities entered)
     HOURLYAVG (Hourly average of quantities entered)

   - **Log Qty Against** : this specifies which entity to record the quantities against:
     Company Asset
     Reading Name
     Customer or Supplier
     Site
     Item

   - **Linked Company Assets** : if logged against an Asset, then this specifies which Asset

   - **Update Reading Name** : if logged against an Asset Reading, then this specifies which Reading Name.



7. Additional Documentation are available to provide more details on some of these new functions:

Freeway B2B - Documentation
http://www.ostendo.info/downloads/ostendo/Freeway_For_B2B_Customers_Explained.pdf

Freeway Sub Contractors - Documentation
http://ostendo.info/downloads/ostendo/Freeway_For_Subcontractors_Explained.pdf

Freeway Internal Employees Recording of Quantities & Statistics - Documentation
http://ostendo.info/downloads/ostendo/Freeway_Recording_Qtys_And_Stats_Explained.pdf

Freeway CorrectiveAction template type
http://ostendo.info/downloads/ostendo/Freeway_Corrective_Actions_Explained.pdf

Freeway Multi Asset Servicing
http://ostendo.info/downloads/ostendo/Freeway_Multi_Asset_Servicing_Explained.pdf

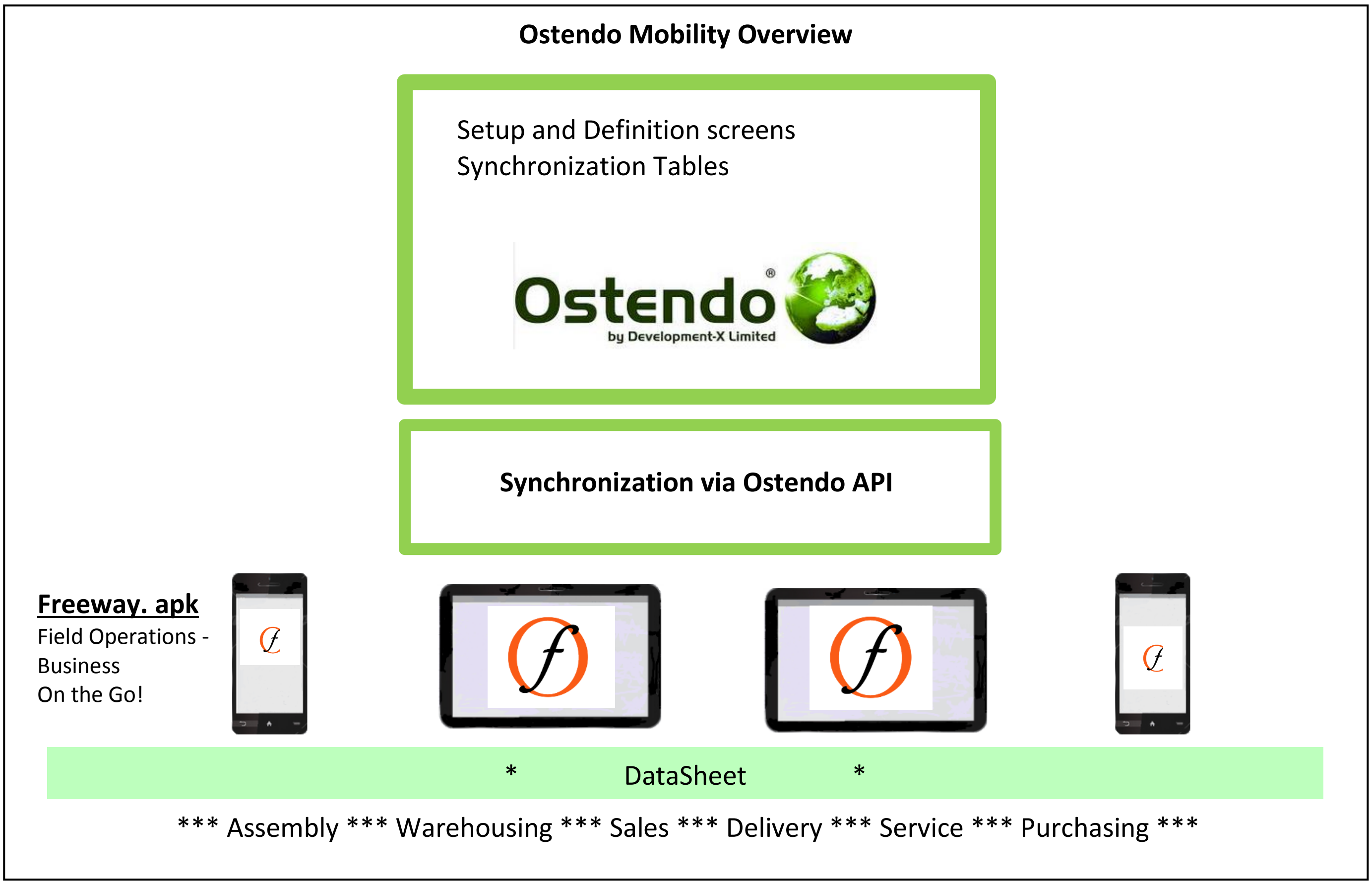
A compilation of previous version changes is kept in the Appendix at the end of this document.

A. INTRODUCTION

The Freeway.apk is a mobile app designed to run on Android and IOS tablets and phones. A Windows offering could be considered later if there is significant demand for it.

The Freeway.apk is tightly integrated with the Ostendo ERP system and provides Ostendo users with innovative mobility solutions across a broad range of functional areas.

The Freeway.apk will also work with authorised standalone solutions which are independently developed for specific industry verticals (example: Electricians COC and ESC, and eSafety for Health and Safety).



The Ostendo-Freeway.apk Mobility solution is designed to be easy to set up and deploy. It consists of three main components:

A. The Ostendo API Configuration and Security setup
B. The Ostendo Mobility Setup and Definition Screens in Ostendo (Mobility Menu)
C. The Freeway.apk Mobile App on the mobile device

The Ostendo Mobility Setup and Definition process defines what data is to be displayed and/or collected, what is mandatory and what is not, and who can use what mobility sheets. This can be done without programming skills by making use of a combination of Check Lists, Images, Signatures, Sketches, Notes, etc.

Freeway.apk has all the necessary features to execute business operations and collect data for a wide variety of functions including:

- Service Jobs/Quotes/Direct Invoices
- Sales Orders/Quotes/Direct Invoices
- Purchase Orders/Receipts
- Update Assembly Orders
- Update Delivery Orders
- Customised Data Collection and business process implementations – for example : Purchase Requisition approvals, New Customer Credit review, Quality Assurance, etc.

Check Lists, images, signatures, sketches, notes, materials, times, etc., are the basic building blocks of the Freeway Mobility app or mobility sheet. You can specify a combination of such objects to perform hazard checks, capture input data, conduct surveys, etc.

The primary objective of Ostendo Freeway is to enable Ostendo users to **quickly set up and deploy *customised* mobile solutions that will enhance business efficiency.**

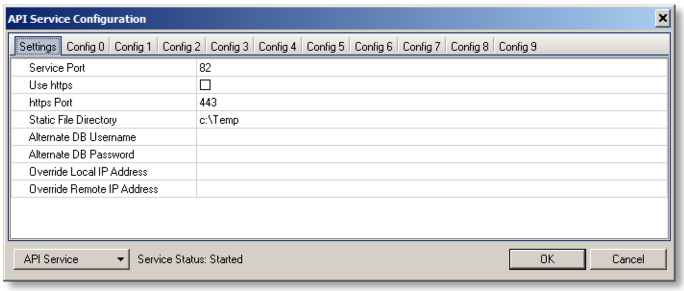
This document will outline the key concepts relating to Ostendo-Freeway.apk Mobility solutions and walk you through the various steps involved in defining and implementing such mobility solutions into the Ostendo ERP system.

I. Ostendo API Configuration

Ostendo-Freeway.apk Mobility solutions require the following:

- Ostendo API service configured and running
- Windows Firewall set to allow Inbound and Outbound access via the API port
- Mobile devices (smartphones or tablets) loaded with the Freeway.apk.

Ostendo API setup:
Go to FILE → API Service and select API Configuration:



For **HTTP**:

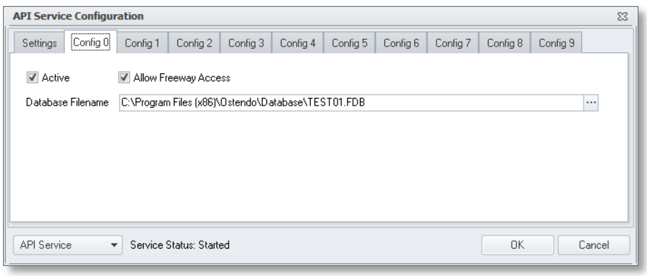
Service Port - enter the Port number (e.g. 82)

For **HTTPS**:

Use Https - tick this box
Https Port - enter the Port number (e.g. 443)
Override Local IP Address – enter the Domain Name which is SSL Certified.
Override Remote IP Address – enter the Domain Name which is SSL Certified.

Note: A fuller description of HTTP and HTTPS settings can be found at the end of this section.

- Assign the appropriate HTTP / HTTPS entries and go to **Config 0** tab.



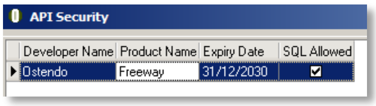
The Mobility License Code must be loaded before you activate the Ostendo API Service for Freeway access. This is done via Mobility Settings – Mobility Rules.

- Fill in the database path. Tick **Active** and **Allow Freeway Access** boxes.

Note: Only Config 0 is used for Freeway Access.
Do <u>not</u> use Config 1 to 9.

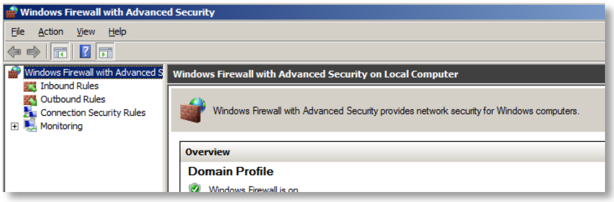
Go to FILE → API Service and select **API Security**:

The API Security screen allows you to authorize one or more third-party developers and products to have access to your Ostendo API Service. It also enables you to generate the API key for each developer-product. Add a record for Freeway if it is not already there. Names should not contain spaces.

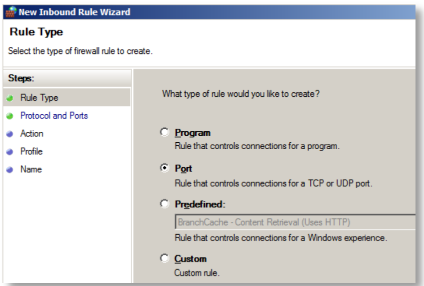


Note: Please ensure your Windows Firewall is set to allow access to the Ostendo API port.
The following example is based on Windows 7. Other versions may be slightly different. The objective is to ensure that the Firewall allows incoming and outgoing traffic via the designated Ostendo API port.

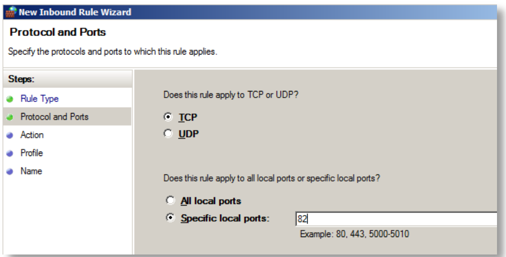
- Go to Windows Firewall – Advanced Settings:



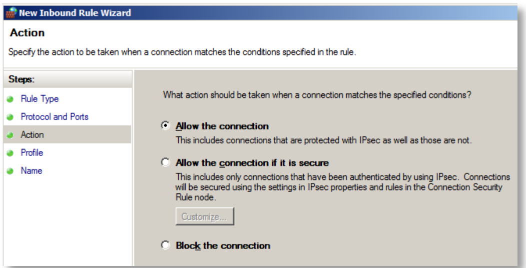
- Click on **Inbound Rules**, New Rule…
- **Rule Type**: Port. Click Next.



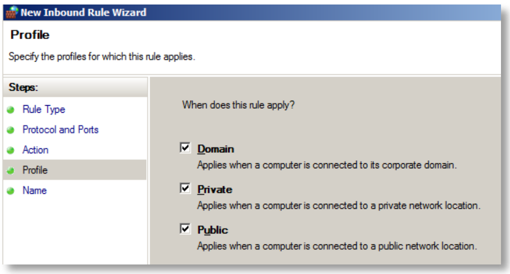
- **Protocol and Ports**: TCP, Specific local port = designated Ostendo API port number. Click Next.



- **Action**: Allow the connection. Click Next.



- **Profile**: Applies to Domain, Private, Public. Click Next again.



- **Name**: Give the Rule an appropriate name. Click Finish.

- **Next, click on Outbound Rules and do exactly the same as above.**

IP Address and Port Forwarding (Applicable for Remote connections only):
You will need to assign a fixed (internal) ***IPv4 address*** to your Ostendo server and set up **Port Forwarding** on your router so that all calls to that API port will be forwarded to your Ostendo server correctly.

Freeway does NOT require your Ostendo API to have a Static IP Address (Fixed External IP Address). This is only required if you have other 3rd party applications interfacing with your Ostendo API.

Note: For operating environments with very strict security that blocks access to websites, please ensure their rules allow the following websites to be accessed:

www.freewayapi.com
http://api.ipify.org

This is required to allow Freeway to send API keys to the cloud and determine IP addresses stored for Freeway.

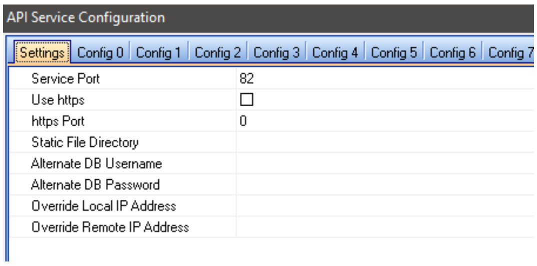
More information on Configuring the Ostendo API Service for HTTP or HTTPS:

For Std Http port connection follow the setup below

<u>Setting Up Ostendo API HTTP:</u>

Access the API Service Configuration screen

- Type in the ‘Service Port’ to use for http (NB: Port forwarding must have already been setup on this port)

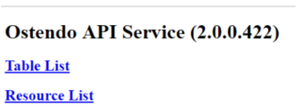


- Ensure you have setup Windows Firewall Inbound / Outbound Exceptions for this port

<u>Test the API Service Connection (Local and Remote):</u>

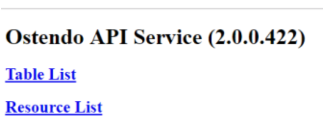
<u>Local IP Address Test:</u>

- From the Windows Command DOS prompt type Ipconfig
- Note the IPv4 Address 192.168.1.53. This is your local IP address
- Type this address In your browser along with the port number as shown in this example. 192.168.1.53:82 (Notice the colon ‘:’ between the IP address and Port No.)
- Your browser should return this screen proving that you have contacted the API successfully. (NB: The version number maybe different)



<u>External IP Address Test:</u>

- From your browser google ‘whats my IP address’
- Google will return your current external IP address.
- Type this address into your browser along with the port number ensuring you have a colon (***externalIPaddress:portnumber***) in between the IP address and Port Number
- Your browser should return this screen proving that you have contacted the API successfully. (NB: The version number maybe different)



Configuring the Ostendo API Service for HTTPS.

For enhanced security, it is strongly recommended that HTTPS be used in preference to HTTP. This is because HTTPS sessions are encrypted. Use HTTP only if the HTTP requests are not routed via the internet.

<u>Steps to implement HTTPS:</u>

- The company needs to obtain an SSL certificate (Signed by a Certificate Authority) for the domain name they wish to use for this (cannot be an IP address)
- Once obtained the certificate must be installed on the server
- Then the certificate must be bound to an IP/port and a URL reservation made in http.sys (Link below on configuration)
- In Ostendo (API Configuration) the flag must be set to use https and the appropriate port set, then *BOTH* the override IP's must be set to the new https domain name

To use HTTPS, you will require an SSL Certificate and SSL Key. Obtaining and setting these up are deliberately not covered off in this document as the methods vary from site to site. **Your IT Support provider <u>must</u> set this up and prove it is working in advance of any Ostendo API setup.** This link may be of assistance to your support provider. NB: This process is not related to Ostendo therefore Development-x cannot assist with this.

https://docs.microsoft.com/en-us/dotnet/framework/wcf/feature-details/configuring-http-and-https#configuring-ssl-certificates

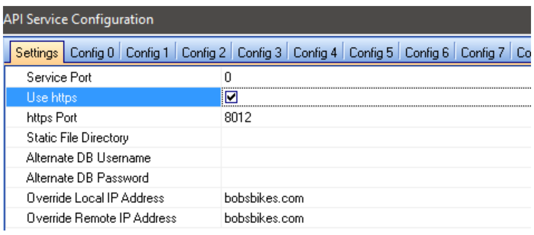
Once the Certificate has been applied and proven to operate correctly by the IT Support Provider, you can amend the necessary Ostendo API Configuration settings as follows.

<u>NB: The Ostendo API Service Session must run either entirely HTTP or HTTPS, not a mixture of both.</u>

<u>Setting Up Ostendo API HTTPS:</u>

Access the API Service Configuration screen

- Tick 'Use https' (NB: Port forwarding must have already been setup on this port)
- Specify the https Port number that has been assigned with port forwarding
- Specify the Domain name in the 'Override Local IP Address'
- Specify the Domain name in the 'Override Remote IP Address'

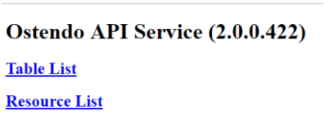


- Ensure you have setup Windows Firewall Inbound / Outbound Exceptions for this port

Test the API Service Connection (Local and Remote Combined):

Local & Remote SSL Certificate Test:

- Thru the web browser type your address.
    - https:\\bobsbike.com



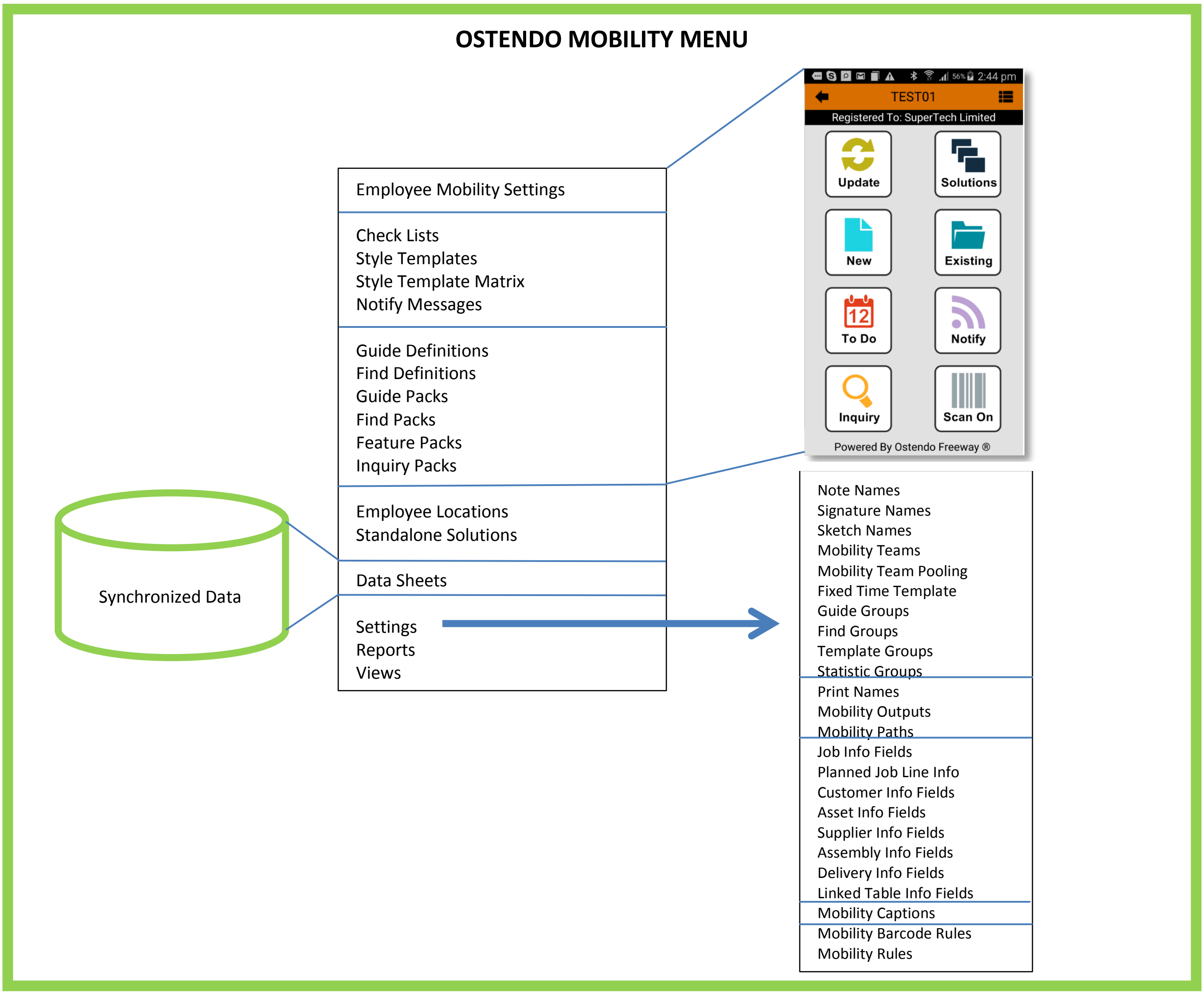
More Information:

Certificate Authorities, or Certificate Authorities / CAs, issue Digital Certificates. Digital Certificates are verifiable small data files that contain identity credentials to help websites, people, and devices represent their authentic online identity (authentic because the CA has verified the identity). CAs play a critical role in how the Internet operates and how transparent, trusted transactions can take place online. CAs issue millions of Digital Certificates each year, and these certificates are used to protect information, encrypt billions of transactions, and enable secure communication.

An SSL Certificate is a popular type of Digital Certificate that binds the ownership details of a web server (and website) to cryptographic keys. These keys are used in the SSL/TLS protocol to activate a secure session between a browser and the web server hosting the SSL Certificate. In order for a browser to trust an SSL Certificate, and establish an SSL/TLS session without security warnings, the SSL Certificate must contain the domain name of the website using it, be issued by a trusted CA, and not have expired.

II. Ostendo Mobility Menu

The Ostendo Mobility Menu is where you set up and manage all mobility-related functions and solutions.



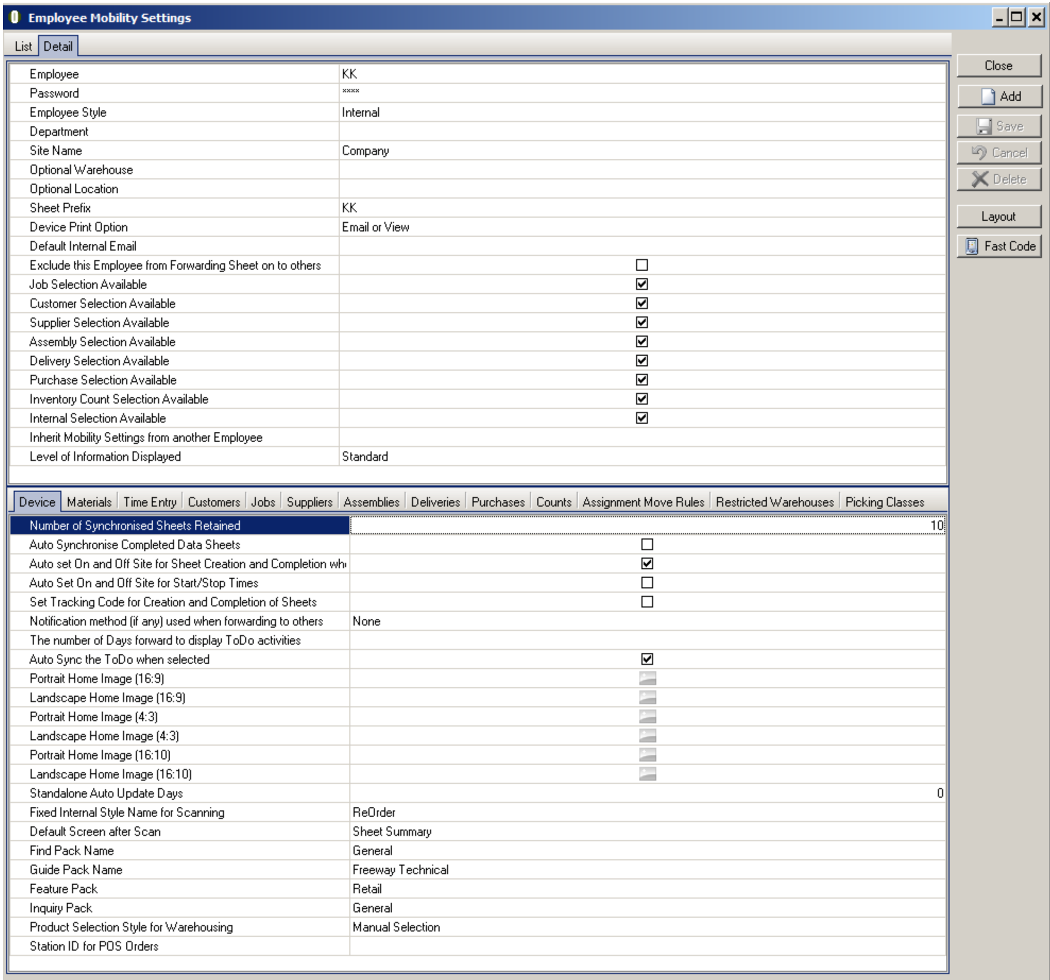
1. Employee Mobility Settings

You need to define an Employee Mobility Settings record for each mobility user.
The top section of the Detail tab is for general user settings. As a minimum, you should fill in the following for each mobile user:

Employee - the name of the mobility user
Password - the password to allow the user to synchronize with Ostendo
Site Name - the name of the site this user is associated with
Sheet Prefix - the unique prefix for this user. This will form part of the datasheet id.

and ***one or more*** of the following needs to be ***ticked***:

Job Selection Available - allows this user to work with Jobs
Customer Selection Available - allows this user to work with Customers
Supplier Selection Available - allows this user to work with Suppliers
Assembly Selection Available - allows this user to work with Assembly Orders
Delivery Selection Available - allows this user to work with Delivery Orders
Purchase Selection Available - allows this user to work with Purchase receipts
Inventory Count Selection Available - allows this user to work with Stock Counts
Internal Selection Available - allows this user to work with Internal datasheets



Please refer to Ostendo Reference Help for further explanations of each field.

The bottom section of the Detail tab consists of several subtabs which allow you to further define how this mobility user's Freeway app will function:

Device : this relates to auto synchronization of completed datasheets, onsite-offsite tracking, Tracking Code for creation/completion, notification method when forwarding datasheets to others, and display of wallpaper images for the Main screen in portrait and landscape modes.

Materials: allows you to restrict the materials that this user is allowed to select

Time Entry: Labour Codes allowed, how time is entered, how time data is posted in Ostendo

Customers:- restrict Customer/Asset selection, number of history notes allowed, Sales Type when creating new Sales Order, whether pricing should be hidden.

Jobs: restrict Job selection, number of history notes allowed, Job Types, Non-Finished Assignments, How Actual Lines are inserted, whether pricing should be hidden.

Suppliers: restrict Supplier selection, number of History Notes allowed, Purchase Type, whether pricing should be hidden.

Assemblies: restrict Assemblies selection, number of History Notes, Non-Finished Assignments, How Actual Lines are inserted.

Deliveries: restrict Deliveries selection, Non-Finished Assignments, whether pricing should be hidden, should Invoiced Deliveries be included?

Purchases: Restriction condition, auto-sync Purchase List, Horizon days

Counts: Restriction condition, auto-sync Count List, display On Hand qty in Count Lines.

Assignment Move Rules: these rules apply to how assignments are affected when an assignment status changes from "Active" to "InProgress" on the Freeway app.

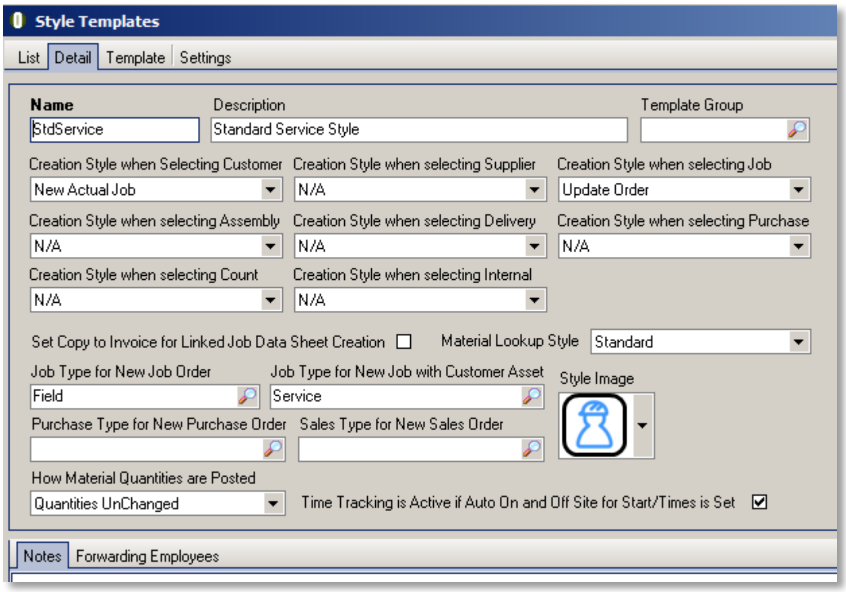
Restricted Warehouses: by site and warehouse

Picking Classes: Include or exclude Picking Classes

2. Style Templates

A Style Template defines the structure and elements that make up a specific business operation / data collection process. It is a set of records describing objects (Check Lists, signatures, sketches, notes, images, etc.) that are associated with a **Style Name**.

For example, you can have different style templates for Service Jobs, Sales Quoting, Purchase Requisition Approvals, etc.
The Style Template screen has 4 tabs (List-Detail-Template-Settings).
The Detail screen shows the StyleName, Description, Creation Styles for various types of work, notes and Forwarding Employees (if applicable).



The 8 Creation Style fields enable you restrict where this style template is used and to specify what happens to the data when you select and use it.
For example, if the Style Name is "SALES ORDER" and Creation Style when Selecting Customer is "New Order Sales" - then what this means is that :
if you select a Customer and then you select this "SALES ORDER" template, then this will enable you to create a New Sales Order for that customer.

If the Style Name is "SALES ORDER" and Creation Style when Selecting Supplier is "N/A" - then what this means is that if you select a Supplier, you will not see this style template.
This is just another way for you restrict where this style template is available for selection.

The Creation Style selected (other than N/A) determines what will be done with the data entered - e.g. new job/order created, or update Assembly order, or just data only, etc. Following is a summary of what you can do with the templates you design based on the Creation Style chosen for each selection type:

Customer:
New Direct Invoice – create a new Direct Invoice for the selected customer.
New Actual Job – create a new Job Order with Actuals issued.
New Order Job – create a new Job Order only (no Actuals).
New Quote Job – create a new Job Quote
New Quote Sales – create a new Sales Quote
New Order Sales – create a new Sales Order
New POS Order – create a new Point-Of-Sale Order
Data Only – collect any data related to a customer.
Data is kept with the DataSheet. No master tables are updated.

Supplier: **New Order Purchase** – create a new Purchase Order for the selected Supplier.
New Receipt Purchase – create a new Purchase Receipt.
Data Only – collect any data related to a Supplier.
Data is kept with the DataSheet. No master tables are updated.

Job: **Update Order** – update an existing Job Order (usually with Actuals).
Data Only – collect any data related to a Job.
Data is kept with the DataSheet. No master tables are updated.

Assembly: **Update Order** – update an existing Assembly Order.
Data Only – collect any data related to an Assembly Order.
Data is kept with the DataSheet. No master tables are updated.

Delivery: **Update Order** – update an existing Delivery Order.
Data Only – collect any data related to a Delivery Order.
Data is kept with the DataSheet. No master tables are updated.

Purchase: **Update Receipt** – update an existing Purchase Order Receipt.
Data Only – collect any data related to a Purchase Order Receipt.
Data is kept with the DataSheet. No master tables are updated.

Count: **Update Count** – update an existing Inventory Count.
Data Only – collect any data related to a Inventory Count.
Data is kept with the DataSheet. No master tables are updated.

Internal: **Update Times** – record non-costed timesheet data usually for Payroll /reporting purpose.
Data Only – collect any data. Data is kept with the DataSheet.
New ReStock Order – This datasheet generates Purchase Order(s) when completed.
A template can be created to enter items and restock quantities required. When the internal data sheet is completed and sync-ed with Ostendo, the Purchase Order(s) will be automatically generated with Status = "Planned".

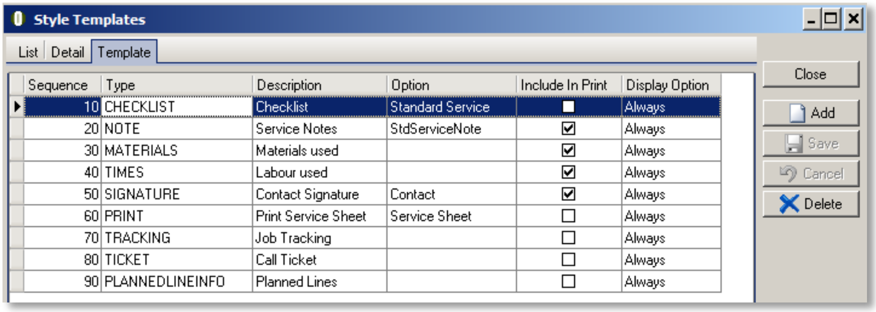
Internal datasheets can be used to drive business processes. For example you could create a template for restocking of sundry items in the office. An employee could use the Freeway app to raise a New ReStock Order, When completed this internal datasheet will create one or more Planned Purchase Orders (one per Supplier). These planned Purchase Orders can be reviewed by a Supervisor before issuing to the supplier(s). The completed datasheet serves as an audit trail for the process.

From the Creation Styles listed above, combined with the ability to record textual data and images / sketches / signatures / audio, etc. and the power of built-in CheckLists – there is an infinite number of ways the Freeway app can be deployed. We just need to stretch our imagination to review/rethink our business processes to see how we can improve business efficiencies by using the power of the Freeway app.

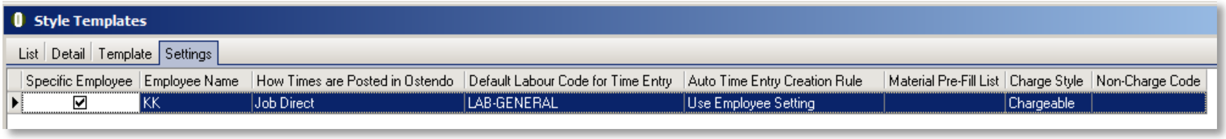
Material Lookup Style can be either **Standard** or **Graphical**. Graphical means mobility images associated with the items or descriptors will also be displayed when looking up materials. Recommended size is 256 x 256 pixels (png or jpeg).

You can also specify the JobType / PurchaseType / SalesType for the Order to be generated with the template style. This will override what is specified in the Employee Mobility Settings.

The **Template tab** shows a set of template lines which effectively defines how that template style will work. Each line defines the sequence number, type (CHECKLIST / NOTE / SIGNATURE / SKETCH / IMAGES / TIMES / MATERIALS / MAP, etc), description, option, Print checkbox, and Display Option.



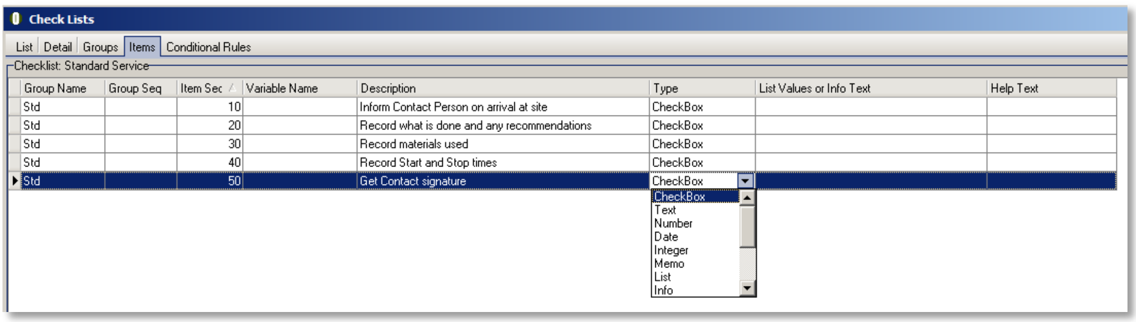
The **Settings tab** allows you to specify certain default settings that will apply whenever this template is used. These settings will take precedence over similar settings in Employee Mobility Settings.



3. **Checklists**

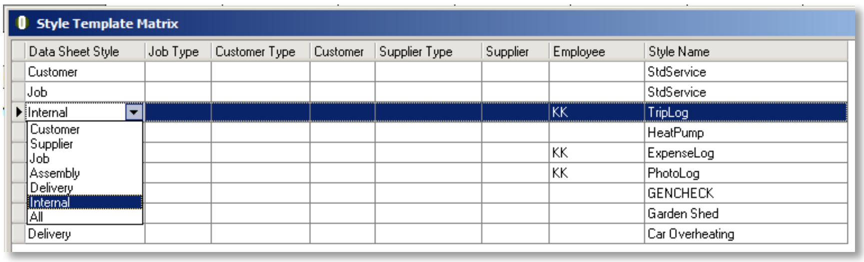
Checklists serve to remind the mobility user to perform specific required actions.
Each Checklist (CheckName) can have one or more GroupNames associated with it. And each Check group will have one or more Check items.
The Checklists screen has 5 tabs (List-Detail-Groups-Items-Conditional Rules).
The Detail screen shows the Checklist name and description.
The Groups screen shows the GroupNames and their “Mandatory_Style” (Optional / All items mandatory / Any One item).
Each item in each group is then defined in the Items tab. Each item is either a Checkbox / Text / Memo / List / Info / Number / Integer/ Date / Time / Signature / PhotoNote / Group CheckBox .

Help Text can be associated with each item. This help text will be displayed on the Freeway app when the user clicks on “Info” next to the template item.



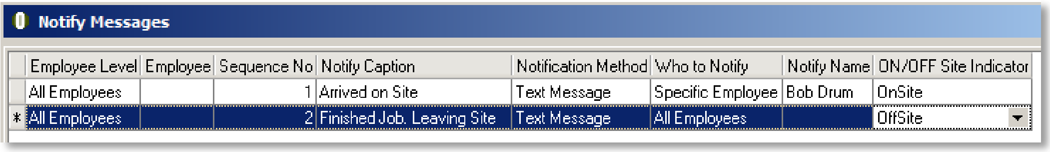
Conditional Rules can be added to checklists to dynamically alter the flow of the checklist based on responses to earlier checklist items. This will be explained in more detail later.
(Please refer to Part 2 – Conditional CheckList Primer at the end of this document.)

4. **Style Template Matrix**
The Style Template Matrix screen defines what Data Sheet style templates are available for selection in the mobile app based on a combination of parameters. It is a grid with the fields – DATASHEETSTYLE, JOBTYPE, CUSTOMERTYPE, CUSTOMER, SUPPLIERTYPE, SUPPLIER, EMPLOYEE, STYLENAME.



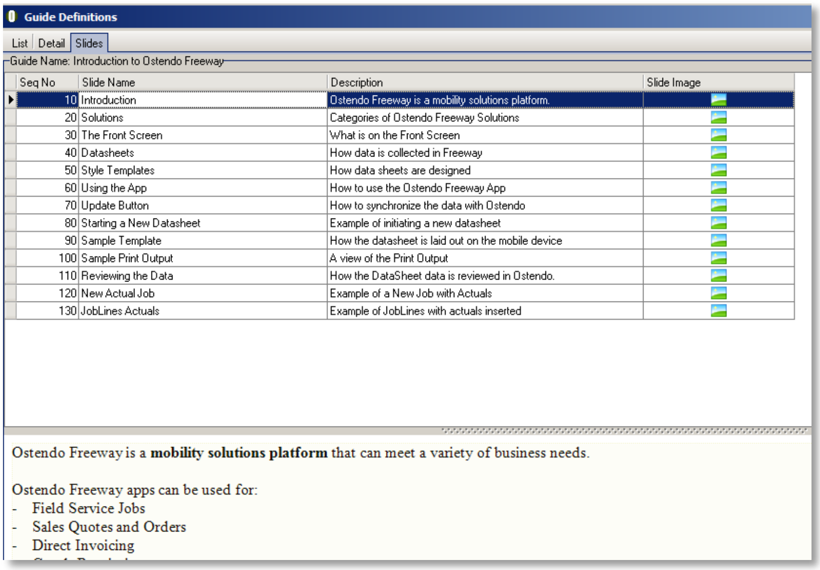
5. **Notify Messages**

This screen allows you to pre-define messages that can be sent to all or specific employees.
Employee Level and Employee columns specify who can select such a message when they click on the Notify button in their Freeway app. The Notify Caption is the actual message sent. The correct status should be entered in the ON/OFF Site Indicator relevant to the Message Caption.



6. **Guide Definitions**

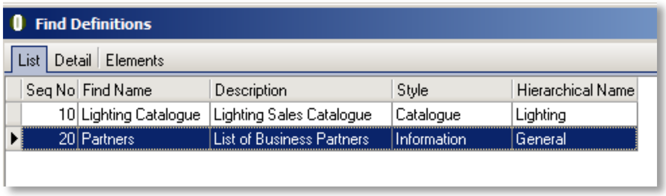
This set of screens allows you to define and compile a set of slides with associated notes into a "Guide". Guides can be easily created wherever there is a need to provide step-by-step instructions with accompanying pictures or simply documenting a process or standard operating procedure.



On the Freeway app, users access to Guides via the **Guides button**.

7. Find Definitions

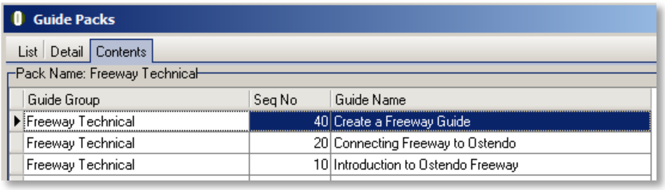
This set of screens allows you to define and compile product catalogues and business information which can be organized into a hierarchical structure. Examples are sales catalogues; or a list of branch offices / stores organized into geographical regions.



On the Freeway app, users access to Catalogues and business information via the **Find button**.

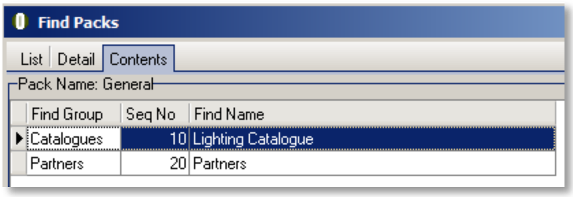
8. Guide Packs

Each Freeway user can be assigned a Guide Pack which defines what Guides he or she can view. Multiple Guide Packs can be defined to meet the different needs of different users.



9. Find Packs

Each Freeway user can be assigned a Find Pack which defines what Catalogues or business information he or she can view. Multiple Find Packs can be defined to meet the different needs of different users.



10. Feature packs

In Item Mobility and Web (and Descriptor Mobility and Web) screens you can enter specific **Features** for each Item or Descriptor.

However there may be other features that you wish to include which applies across all items/descriptors (e.g. the Standard Sell Price).

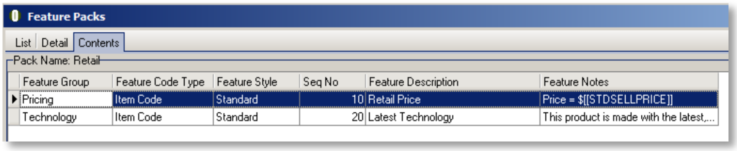
So instead of adding Standard Sell Price as a feature in each and every Item or Descriptor, we can use **Feature Packs** to do that.

Feature Packs also allow you to pull in all associated **Item Properties / Descriptor Properties** to be included as Features.

If no Feature Packs are defined, then you will only see the features defined for each individual item / descriptor via the Item/Descriptor Mobility and Web screens.

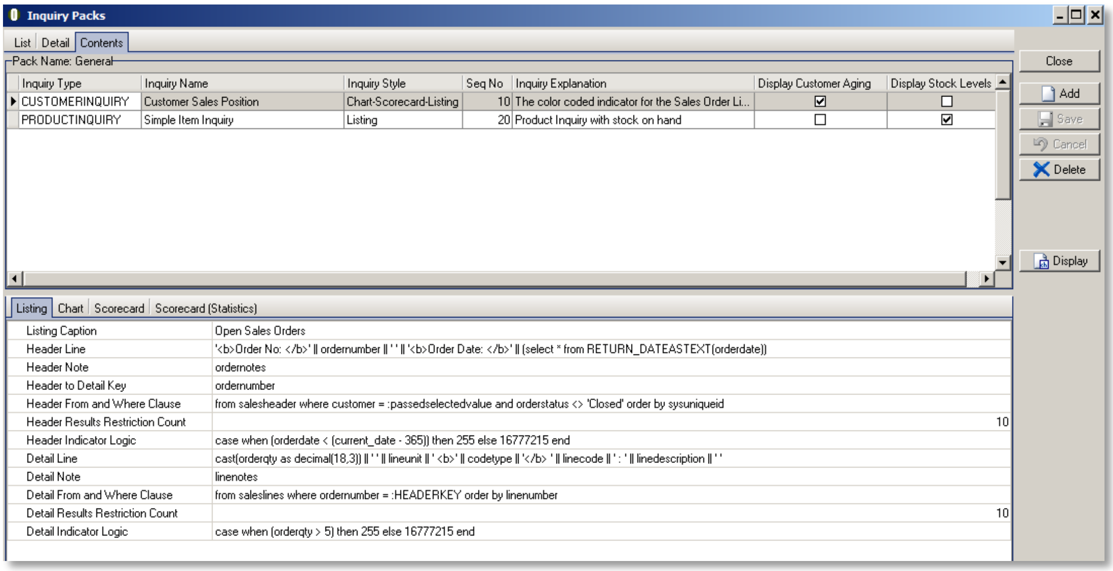
You can have multiple Feature packs defined to meet the different needs of different groups of Freeway users.

A Freeway user can have only **one Feature Pack name assigned**, but that pack can have many **Feature Groups**.



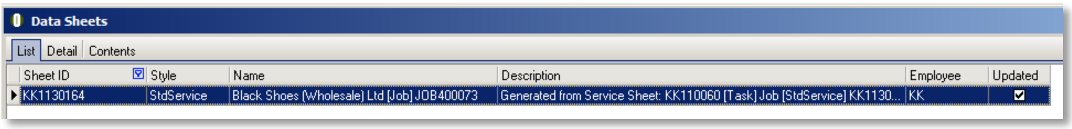
11. Inquiry Packs

These screens allow you to define standard inquiries for the Freeway user. It is in fact an Inquiry report generator that facilitates the creation of your own inquiries in a simple, structured manner. You can define multiple Inquiry Pack names and their associated inquiries. Each Freeway Mobility user can be assigned an Inquiry Pack and this will determine the inquiries he has access to.



12. Data Sheets

The Data Sheets screen allows the user to view and edit the Data Sheets data received from the mobile device. It has 3 tabs (List-Detail-Contents).
Each time a Data Sheet is captured using the Freeway Mobile App, a **SheetID** is assigned.
The List tab display a list of all Data Sheets by SheetID.
The Detail tab shows the summary grid of all records relating to a specific Data Sheet.
The Contents tab allows you to browse through the actual data in the Data Sheet.



Data Sheets

List | Detail | Contents

Name	Description	Type
Information	Black Shoes (Wholesale) Ltd [Job] JOB400073	INFO
Standard Service	Checklist	CHECKLIST
StdServiceNote	Service Notes	NOTE
Materials & Charges	Materials used	MATERIALS
Times	Labour used	TIMES
Contact	Contact Signature	SIGNATURE
Site Tracking	Job Tracking	TRACKING
Ticket	Call Ticket	CHECKLIST

13. **Settings -** These are a series of names and definitions required to create the mobility templates.

Note Names: Note Names allows you to name different types of notes you wish to use with your Style Templates.

Note Names

Note Name	Description	Copy to Customer Notes	Copy to Customer History Notes	Copy to Direct Invoice Notes	Copy to Job Notes	Copy to Job History Notes	Copy to Job Invoice Not
ActivityNote	Activity Note	☐	☐	☐	☑	☐	☐
QANote	Quality Assurance Notes	☐	☐	☐	☐	☐	☐
ShedNote	Shed Notes	☐	☐	☐	☑	☑	☑
StdServiceNote	Standard Service Notes	☐	☐	☐	☑	☑	☐

Signature Names: Signature Names allows you to name different types of signatures you wish to use with your Style Templates.

Signature Names

Signature Name	Description	Mandatory	Lock Checklists when Signed	Lock Materials when Signed	Lock Times when Signed	Signature Clause
Contact	Contact Signature	☑	☐	☐	☐	
Inspector	Inspector Signature	☑	☑	☐	☐	
QA	QA Signature	☑	☑	☐	☐	

Sketch Names: Sketch Names allows you to name different types of sketches you wish to use with your Style Templates.

Sketch Names

Sketch Name	Description
Cabling	Cabling Diagram
Config	Configuration Diagram
Design	Design
Room	Room Layout
Site	Site layout
Sketch	Sketch

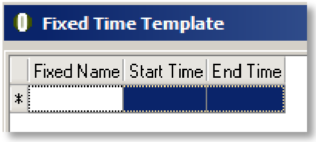
Mobility Teams: Mobility Teams setting allow you to name the teams and link the workers to each team. The workers' time can be entered by a supervisor and assignments can be made to Mobility Teams.

Mobility Teams

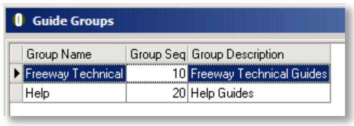
Team Name	Employee
A-Team	Bob Drum
A-Team	Jane Steel
A-Team	Keith Rogers

Mobility Team Pooling: This allows you to identify the teams which work on a "pooled" basis. This means anyone in the team can grab a job assigned to the pool. Once a team member grabs a job, it will ***not*** be available to anyone else in the team. The assignment will then belong to just that individual team member (and the assignment board will be updated accordingly).

Fixed Time Template: Fixed Time Template allows you to pre-define all the fixed time slots associated with a Fixed Time Template name. You can define multiple time slots for one or more names.

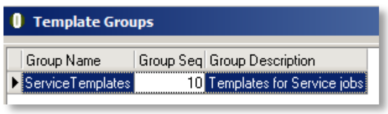


Guide Groups: Guide Groups setting allows you to define the names of Guide Groups which can be used when organizing Guide Packs for Freeway users.

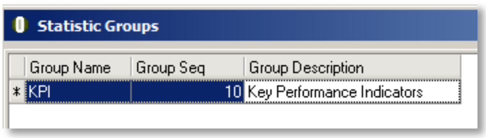


Find Groups: Find Groups setting allows you to define the names of Find Groups which can be used when organizing Find Packs for Freeway users.

Template Groups: Template Groups setting allows you to define the names of Template Groups which can be used in Style Template's Detail tab. Templates having the same group name will be displayed together in the Freeway App.



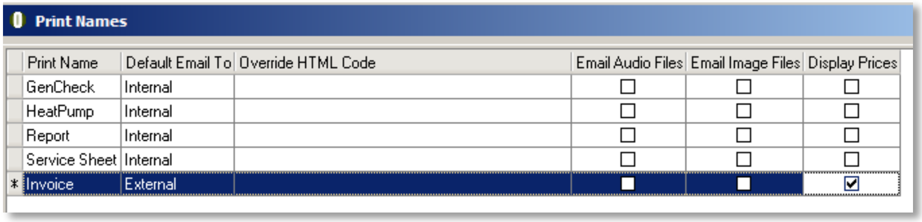
Statistic Groups: Statistic Groups setting allows you to define the names of Scorecard Statistic Groups which can be used in Scorecard Statistics tab. This enables you to organize scorecard statistics in an Inquiry into logical groupings.



Print Names:

Mobility Print Names allows you to list different types of print outputs you wish to use with your Style Templates. The Override HTML Code here allows you to replace the default HTML with your own HTML for the entire output of each Print Name.

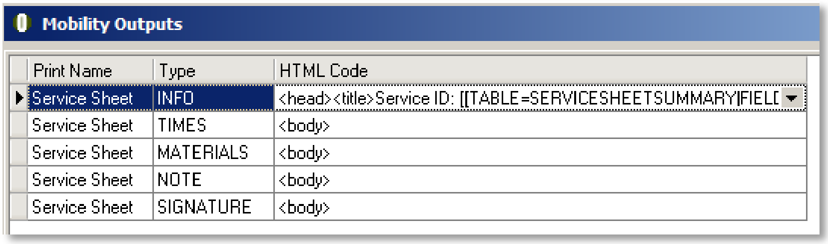
The Print Name must not include any special characters (e.g. "/", etc.)



Display Prices option allows prices to be included in the Print output.

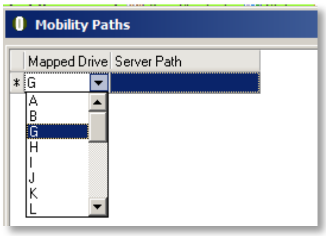
Mobility Outputs:

Mobility Outputs allows you to define / override HTML contents per section (type) of the print outputs.



Mobility Paths:

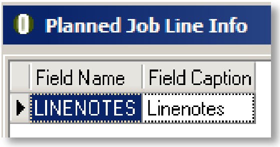
This allows you to specify the full UNC path of each of your mapped drives. This is required to ensure that the Freeway app can access any linked document which may be stored in mapped drives. The format of the path would be :
\\ComputerName\SharedFolder\Resource



Job Info Fields:

Job Info Fields allows you to add any other Job Header record fields to be displayed in the mobile app - Job Inquiry function.

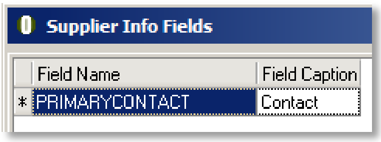
Planned Job Line Info: Planned Job Line Info allows you to display fields for any unissued (planned) job lines in the Style template. The default fields that are always displayed in Planned Lines are LineNumber, LineCode, LineDescription.



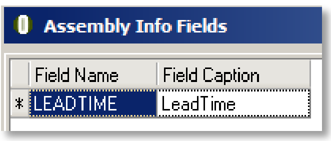
Customer Info Fields: Customer Info Fields allows you to add any other Customer master record fields to be displayed in the mobile app - Customer Inquiry function.

Asset Info Fields: Asset Info Fields allows you to add any other Customer Asset record fields to be displayed in the mobile app - Asset Inquiry function.

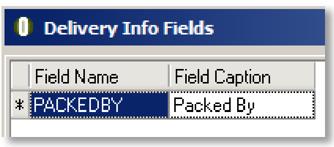
Supplier Info Fields: Supplier Info Fields allows you to add any other Supplier master record fields to be displayed in the mobile app - Supplier Inquiry function.



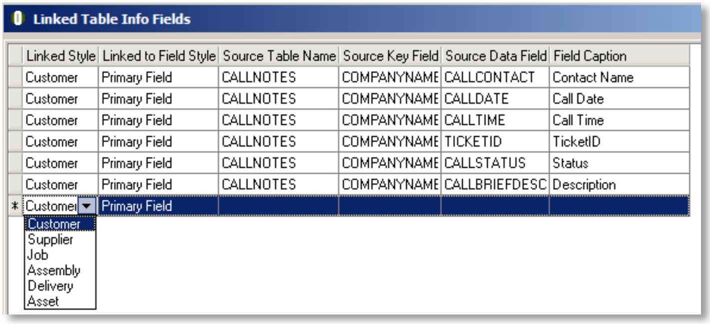
Assembly Info Fields: Assembly Info Fields allows you to add any other AssemblyHeader record fields to be displayed in the mobile app - Assembly Inquiry function.



Delivery Info Fields: Delivery Info Fields allows you to add any other SalesDeliveryHeader record fields to be displayed in the mobile app - Delivery Inquiry function.

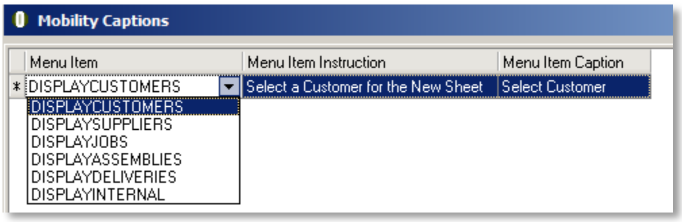


Linked Table Info Fields: This allows you to add any fields to be displayed from any table that is linked to Customer / Supplier / Job / Assembly / Delivery / Asset.

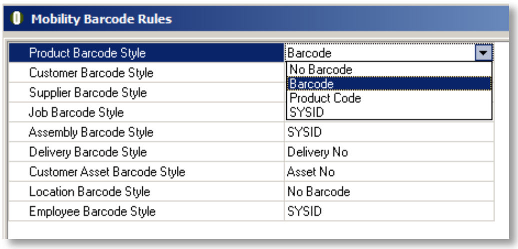


Mobility Captions: The 

button on the Main Screen displays a menu for selection of Jobs, Customers, Suppliers, Assembly Orders, Delivery Orders, and Internal Data Sheets. The Mobility Captions allows you to modify the captions for any of the items in this menu.

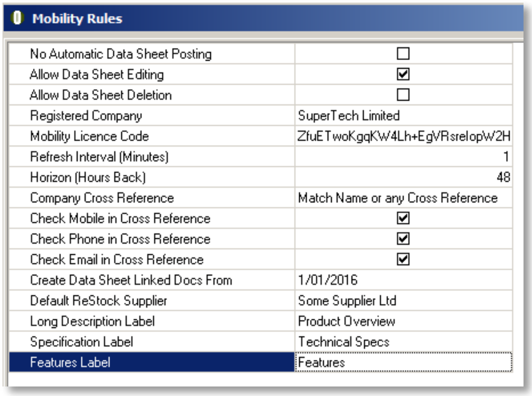


Mobility Barcode Rules: These rules define what fields are used to identify the entity when barcode scanning is used. Ostendo builds a reference list of all such codes. When a barcode is scanned, the Freeway app will be able to determine the entity type (Product / Customer / Supplier / JobTask/ AssemblyStep / Delivery /Customer Asset) and what to do next.



*For Job Barcode, use the **JOBTASKS**' SYSUNIQUEID.*
*For Assembly Barcode, use the **ASSEMBLYSTEPS**' SYSUNIQUEID.*

Mobility Rules: With these rules, you can stop automatic posting to Service Jobs or Sales Orders when data is synchronized with the host.
You can also specify whether editing or deletion of the uploaded sheets is allowed.
The Registered Company allows you to display the name of your company in the main menu of the Ostendo Freeway Service.



The Mobility License Code must be loaded here before you activate the Ostendo API Service for Freeway

Refresh Interval and Horizon defines how often Employee Locations display is refreshed and how far back in time to retrieve Employee location data.

Company Cross Reference style is used when the Freeway app creates new Customer or Supplier records. This check helps to prevent duplicate customer/supplier records.

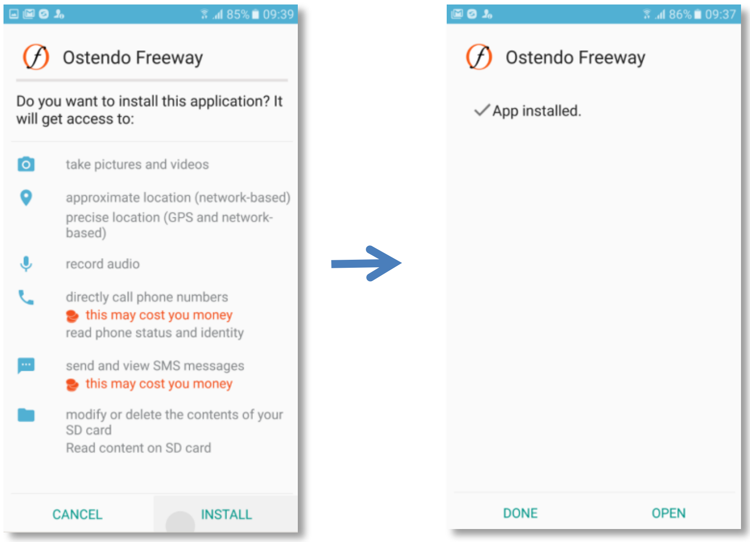
You can specify when to start creating Data Sheet pdf documents which will be linked to the respective Job/Assembly/Sales/Purchase/Invoice. (Requires Parent Folder Path to be specified in General Rules as well as DataSheet Queue Type to be specified in Queue Schedule.)

Default ReStock Supplier – allows you to specify a Supplier as the default for generating a Purchase Order when a New ReStock Order (internal) data sheet is completed.

III. Ostendo Freeway.apk - the Mobility App

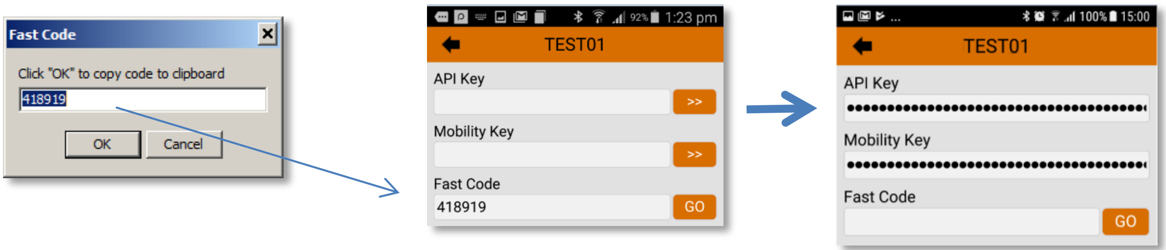
Installing the Freeway.apk on your mobile device:

1. Once you have downloaded/copied the **freeway.apk** to your device, click **Install** button.



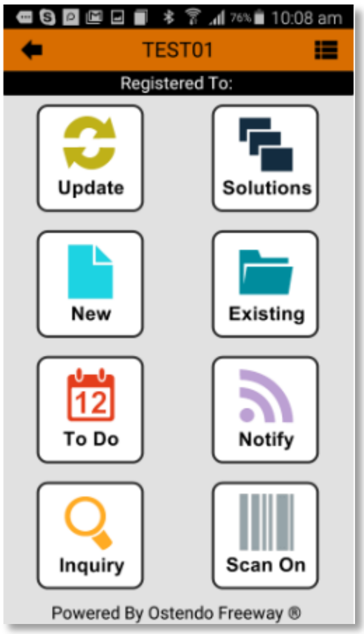
2. Open the app and click on "**Ostendo – Connect to an Ostendo ERP Backend**" and enter a **Solution Name**. The Solution Name allows the Mobility User to give a unique label to the Ostendo Database being connected to. Please note that the same Freeway app on the same device can be used to connect to more than one Ostendo database or Standalone Solution. The Solution Name will appear at the top of the screen so that the user will know which Ostendo database or Standalone solution he/she is working with.

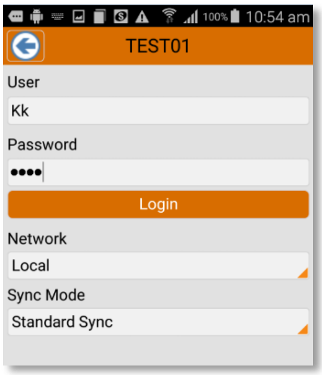
3. Now you need to go to **API Security** in Ostendo to generate a **FastCode**. Enter the FastCode into the Freeway app and press **GO** button. The FastCode will install the API Key and the Mobility Key into the app. Press the back arrow to return to Main screen.



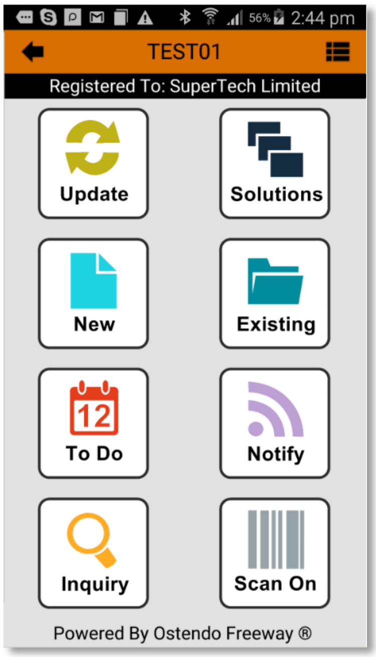
4. **Initial synchronization with Ostendo** – Press  button on the Main Screen.

Enter the Mobility User's **name** and **password** as defined in Employee Mobility Settings (in Ostendo).
Then press Login to start initial synchronization.
This step connects the mobile device to Ostendo. Ostendo then verifies the employee's credentials and, based on his settings in the EMPLOYEEMOBILITYSETTINGS table, will send the relevant jobs/customers data and/or mobile sheet templates back to the device. Upon successful synchronization, the user can start working with the Freeway app.





Network: This can be either **Local** or **Remote.**
Local means you are connecting directly to your Ostendo machine via your wifi LAN.
Remote means connecting via the internet (WAN).



Under normal usage, as a security measure, the user needs to enter a Username and password before synchronisation can begin. Completed mobility sheets on the device are first sent back to the Ostendo database before any new data is brought back to the device.

Once synchronization is completed, the app disconnects from the host database and the mobile user carries on in **offline mode**.

This Main Screen button shows what solutions are available to be loaded onto this app.

This Main Screen button starts a new datasheet process. It first prompts you to select either a Job/Customer/Supplier/Assembly/Delivery/Internal before selecting the appropriate template to generate the datasheet..

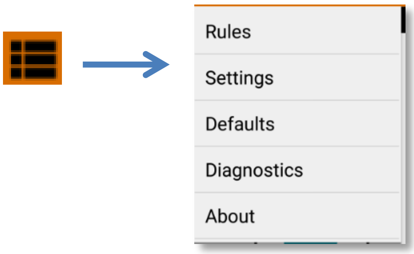
This Main Screen button displays existing datasheets for selection. This allows you to continue working on previously created datasheets.

This Main Screen button displays list of To Do tasks for selection. In Ostendo, such tasks are generated by Call Ticket Actions, Job/Sales Quotes Follow-Up Actions, Activity Calendar Events (appointments), and History Notes Follow-Up Actions.

This Main Screen button displays list of Notification Messages that the user can send.
These messages are pre-defined in Ostendo Mobility menu – Notify Messages.

This Main Screen button displays list of standard Inquiries for selection. These inquiries allow the user to get additional information relating to Jobs, Customers, Suppliers, Assembly Orders, Deliveries, and Labour Times recorded.

This Main Screen button allows you to scan a barcode and immediately initiate a datasheet. This button functions like a short-cut way to launch datasheets based on the type of barcode being scanned.



The **Menu** button at the top right hand corner of the Main Screen displays the following:

Rules – gives a summary of the Employee Mobility Settings of this user.
Settings – allows user to modify the View Size, Theme, Keyboard style, Speed Entry, and Barcode Scanner Type.
Defaults – to specify Tracking Codes for when DataSheet is created and when it is completed. Applicable to Jobs, Assemblies, Deliveries.
Diagnostics – runs a set of checks to test the connection between the Mobile device and the API.
About – This shows the current Freeway apk version number.

Tip: The Back Key will bring you to the previous displayed screen. If you keep on pressing the Back Key, you will eventually exit the application.
Using the ***Home Key*** allows you to temporarily step out of the application and do something else (like - take a phone call, send a message, or run another app). To return to the Ostendo Freeway App, all you need to do is click on the Freeway icon again and you will be brought back to the exact same page you were on previously.

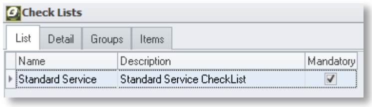
B. Mobility Setup and Definitions (An Example)

We shall use a very simple example to illustrate how to create a mobility solution using Ostendo Freeway. Let us assume that we want the service technician to follow this standard procedure at every service job he attends:

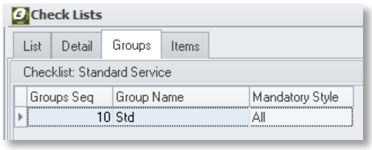
1. Inform contact person of his arrival on site.
2. Perform the job and make service notes and recommendations
3. Record materials used.
4. Record Start and Stop times
5. Get Contact signature at end of job before leaving site.

Check Lists

We want to include a Checklist to ensure all these mandatory steps are done. We can call this check list "Standard Service" and go to **Mobility menu** to set it up like this:

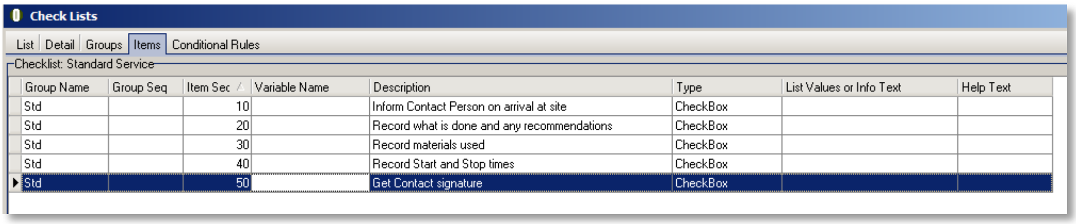


Name	Description	Mandatory
Standard Service	Standard Service CheckList	☑



Groups Seq	Group Name	Mandatory Style
10	Std	All

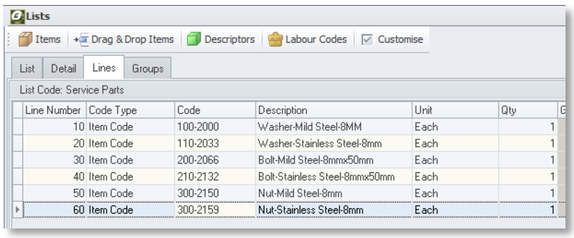
> ***Note**: Check Lists do not need to be included in the style. However it is often helpful to include checklists to remind service personnel and to maintain service standards.*



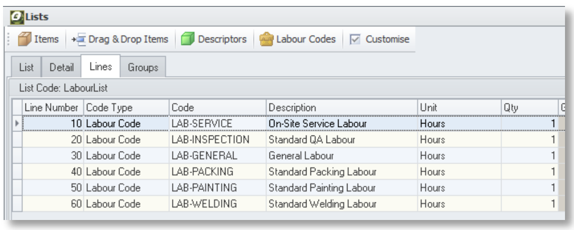
Group Name	Group Seq	Item Sec	Variable Name	Description	Type	List Values or Info Text	Help Text
Std		10		Inform Contact Person on arrival at site	CheckBox		
Std		20		Record what is done and any recommendations	CheckBox		
Std		30		Record materials used	CheckBox		
Std		40		Record Start and Stop times	CheckBox		
Std		50		Get Contact signature	CheckBox		

Lists

Since we need to record materials and times used, we will need to set up a couple of lists. Go to **Inventory → Lists** and set up something like these:



Line Number	Code Type	Code	Description	Unit	Qty
10	Item Code	100-2000	Washer-Mild Steel-8MM	Each	1
20	Item Code	110-2033	Washer-Stainless Steel-8mm	Each	1
30	Item Code	200-2066	Bolt-Mild Steel-8mmx50mm	Each	1
40	Item Code	210-2132	Bolt-Stainless Steel-8mmx50mm	Each	1
50	Item Code	300-2150	Nut-Mild Steel-8mm	Each	1
60	Item Code	300-2159	Nut-Stainless Steel-8mm	Each	1

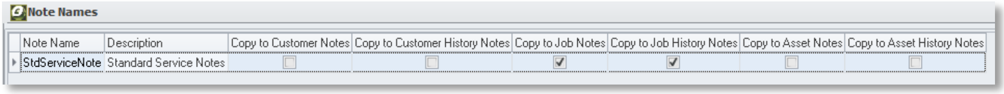


Line Number	Code Type	Code	Description	Unit	Qty
10	Labour Code	LAB-SERVICE	On-Site Service Labour	Hours	1
20	Labour Code	LAB-INSPECTION	Standard QA Labour	Hours	1
30	Labour Code	LAB-GENERAL	General Labour	Hours	1
40	Labour Code	LAB-PACKING	Standard Packing Labour	Hours	1
50	Labour Code	LAB-PAINTING	Standard Painting Labour	Hours	1
60	Labour Code	LAB-WELDING	Standard Welding Labour	Hours	1

Note that Lists are associated with employees. This means that different employees can have the same or different lists (if so required).

Note Names

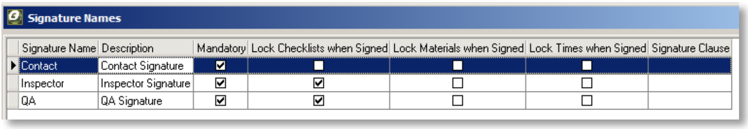
We want the service technician to record notes, so we need to define a Note Name called “StdServiceNote”. Go to Mobility → Settings and select Note Names:



You will notice that you could set the notes to be automatically copied to various places. You can also specify Call Classification and Subclassification for History notes.

Signature Names

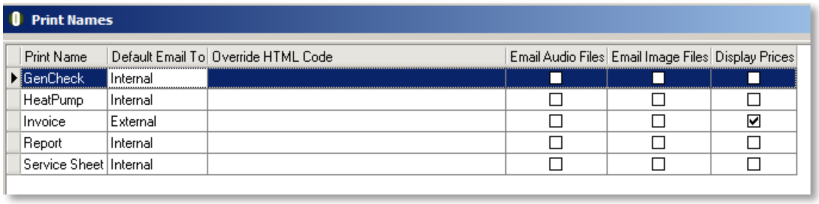
In the same way, for signatures, we need to define a Signature Name in Mobility Settings:



If required, you can prevent changes being made to the Data sheet after it has been signed by the client. Just tick the appropriate “Lock” checkbox.

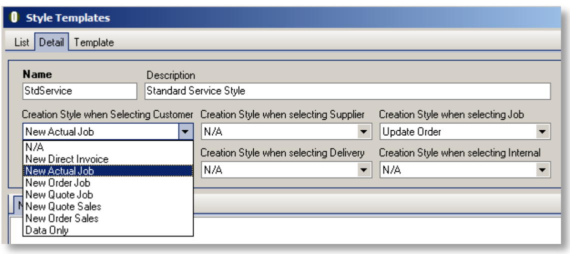
Print Names

If we want Print Output, then we need to define a Mobility Print Name in Mobility Settings. The Override HTML Code here allows you to replace the default with your own HTML layout design:



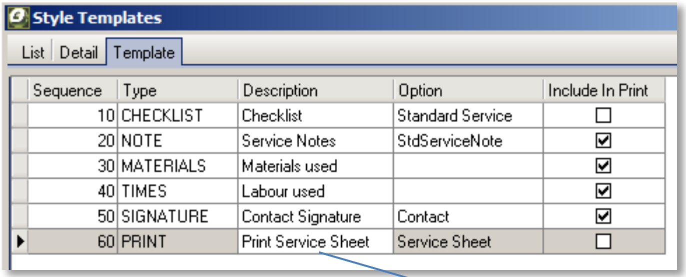
Style Templates

We now have sufficient elements ready to define a style template for our Standard Service job. Go to Mobility → Style Templates and add a style called “StdService”:

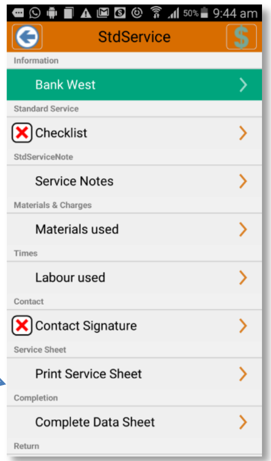


A style allows you to specify whether a Job with Actuals will be created, or an Invoice, or just a Job Order (no actuals), or a Quote. In our example, since we are doing service jobs, this style will create jobs with actuals (time and materials) included.

The contents of the template for our simple service jobs will be as follows:



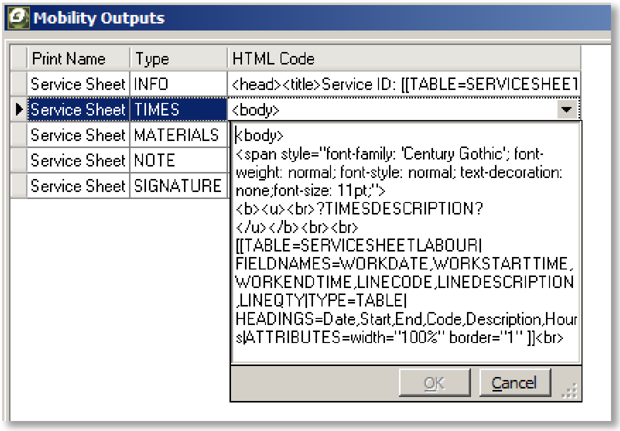
Sequence	Type	Description	Option	Include In Print
10	CHECKLIST	Checklist	Standard Service	☐
20	NOTE	Service Notes	StdServiceNote	☑
30	MATERIALS	Materials used		☑
40	TIMES	Labour used		☑
50	SIGNATURE	Contact Signature	Contact	☑
60	PRINT	Print Service Sheet	Service Sheet	☐



Note: The last line in this example defines the PRINT output for this style. The Print Name used is selected in the Option field, and the contents to be printed are those that are ticked.

When this style is displayed on a mobile device, the user will work with exactly this set of items and nothing else. So ***a style template in effect guides the user as work is carried out and data recorded***.

Note: If you want to modify a particular section of the Print Output, then go to **Mobility Outputs** in Mobility Settings and enter/modify the HTML codes used to generate that section:



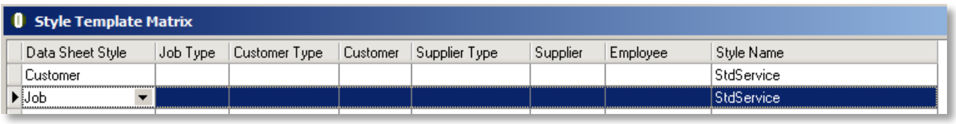
Print Name	Type	HTML Code
Service Sheet	INFO	<head><title>Service ID: [[TABLE=SERVICESHEET
Service Sheet	TIMES	<body>
Service Sheet	MATERIALS	
Service Sheet	NOTE	
Service Sheet	SIGNATURE	

If the Print Name does not exist yet, then Add a record, specify the Print Name, select the type and hit SAVE. The HTML Code will then be added. Make your alterations and hit SAVE again.

(If you are happy with the standard HTML code provided, then you do not need to specify anything in the Mobility Outputs.)

Style Template Matrix

This matrix allows you to specify what style sheet to use under what conditions. In our example, we simply want to use our StdService style for all jobs and all customers.

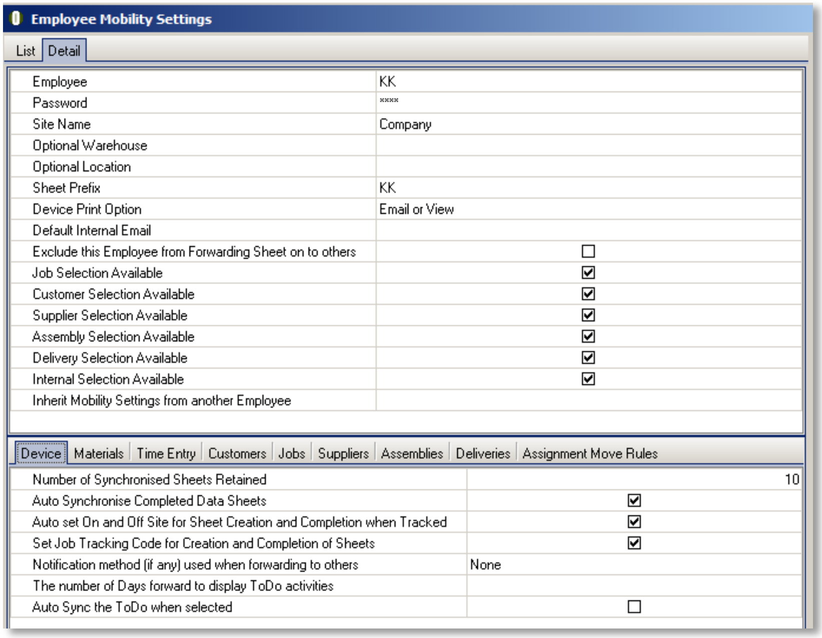


Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Customer							StdService
Job							StdService

Employee Mobility Settings

This is the final setup step - before we can start using the mobility solution.

Employee Mobility Settings defines the employee's unique password and prefix and what is displayed to him when using Ostendo Freeway Mobility solutions.



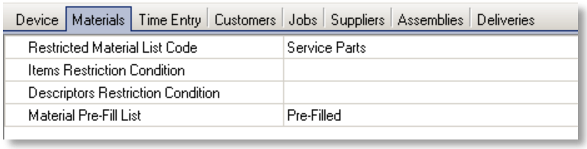
Employee Mobility Settings

List | Detail

Employee	KK
Password	****
Site Name	Company
Optional Warehouse	
Optional Location	
Sheet Prefix	KK
Device Print Option	Email or View
Default Internal Email	
Exclude this Employee from Forwarding Sheet on to others	☐
Job Selection Available	☑
Customer Selection Available	☑
Supplier Selection Available	☑
Assembly Selection Available	☑
Delivery Selection Available	☑
Internal Selection Available	☑
Inherit Mobility Settings from another Employee	

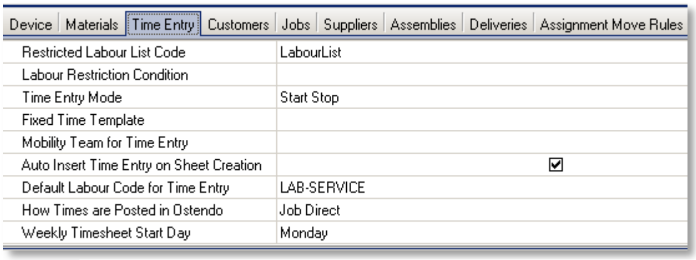
Device | Materials | Time Entry | Customers | Jobs | Suppliers | Assemblies | Deliveries | Assignment Move Rules

Number of Synchronised Sheets Retained	10
Auto Synchronise Completed Data Sheets	☑
Auto set On and Off Site for Sheet Creation and Completion when Tracked	☑
Set Job Tracking Code for Creation and Completion of Sheets	☑
Notification method (if any) used when forwarding to others	None
The number of Days forward to display ToDo activities	
Auto Sync the ToDo when selected	☐



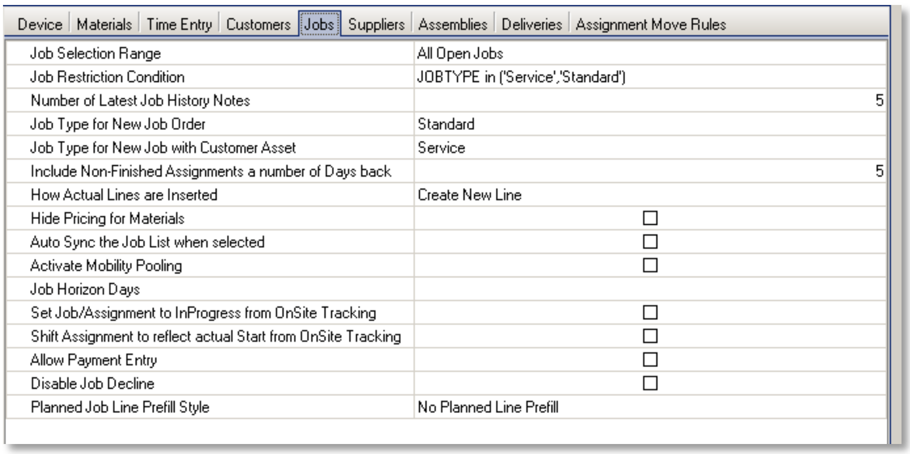
Device | Materials | Time Entry | Customers | Jobs | Suppliers | Assemblies | Deliveries

Restricted Material List Code	Service Parts
Items Restriction Condition	
Descriptors Restriction Condition	
Material Pre-Fill List	Pre-Filled



Device | Materials | Time Entry | Customers | Jobs | Suppliers | Assemblies | Deliveries | Assignment Move Rules

Restricted Labour List Code	LabourList
Labour Restriction Condition	
Time Entry Mode	Start Stop
Fixed Time Template	
Mobility Team for Time Entry	
Auto Insert Time Entry on Sheet Creation	☑
Default Labour Code for Time Entry	LAB-SERVICE
How Times are Posted in Ostendo	Job Direct
Weekly Timesheet Start Day	Monday



Device | Materials | Time Entry | Customers | Jobs | Suppliers | Assemblies | Deliveries | Assignment Move Rules

Job Selection Range	All Open Jobs
Job Restriction Condition	JOBTYPE in ('Service','Standard')
Number of Latest Job History Notes	5
Job Type for New Job Order	Standard
Job Type for New Job with Customer Asset	Service
Include Non-Finished Assignments a number of Days back	5
How Actual Lines are Inserted	Create New Line
Hide Pricing for Materials	☐
Auto Sync the Job List when selected	☐
Activate Mobility Pooling	☐
Job Horizon Days	
Set Job/Assignment to InProgress from OnSite Tracking	☐
Shift Assignment to reflect actual Start from OnSite Tracking	☐
Allow Payment Entry	☐
Disable Job Decline	☐
Planned Job Line Prefill Style	No Planned Line Prefill

Please refer to Ostendo Reference Help for details of the Employee Mobility Settings fields.

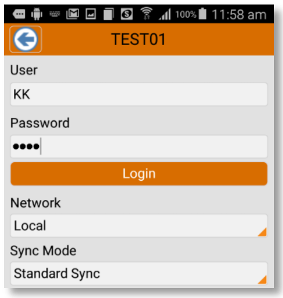
C. Using The App

Now that we have completed the setup and definitions for a simple DataSheet style as well as set up an employee to work with this app, let's try it out.

1. Click on the Freeway.apk app icon 

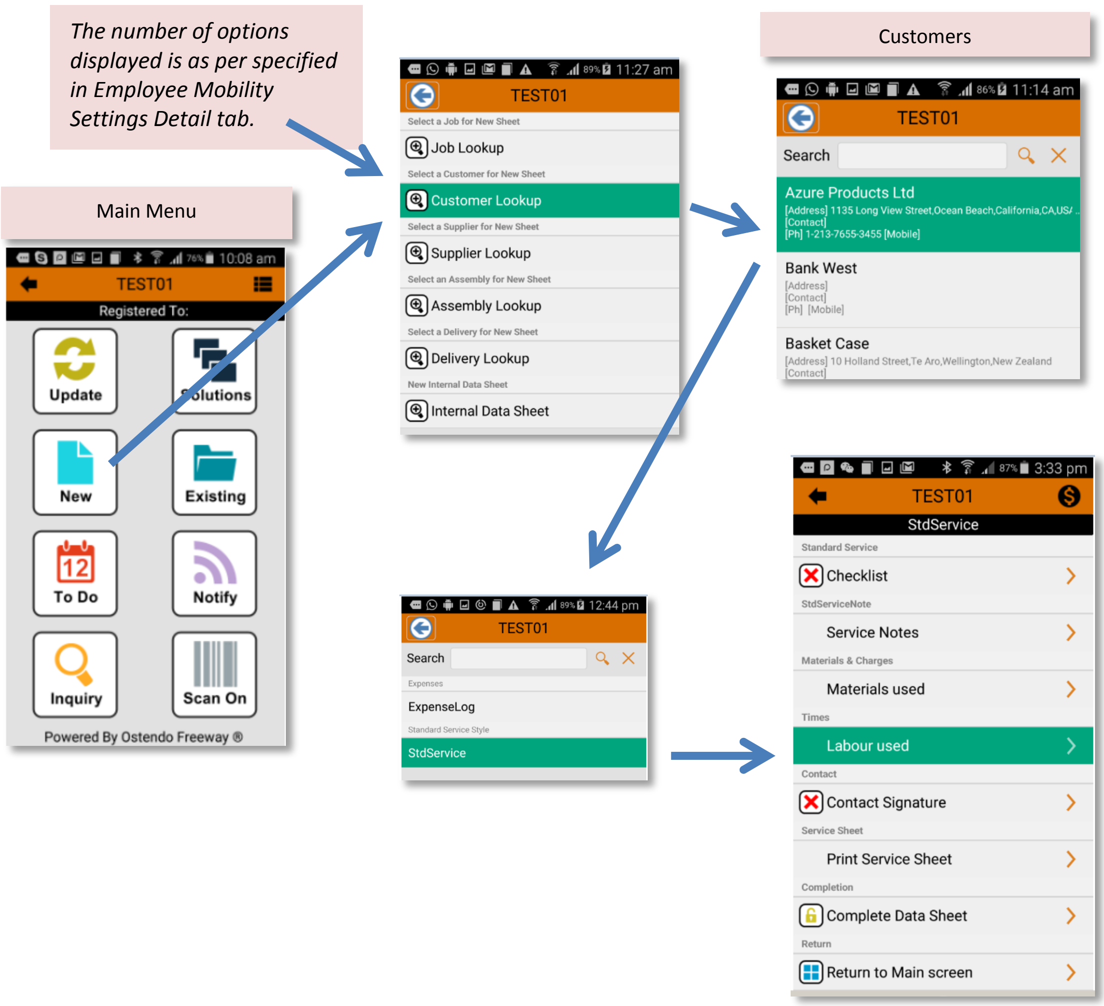
2. Click on 

Fill in the User name and password and click on Login. After a few seconds, all the required lists, style templates, jobs/customers/suppliers, etc. will be downloaded to the mobile device.

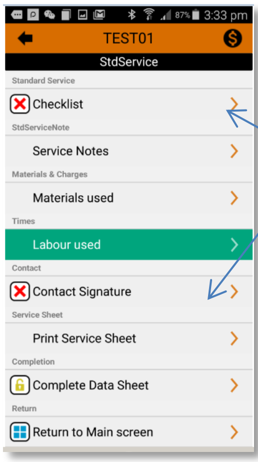


3. Click on 

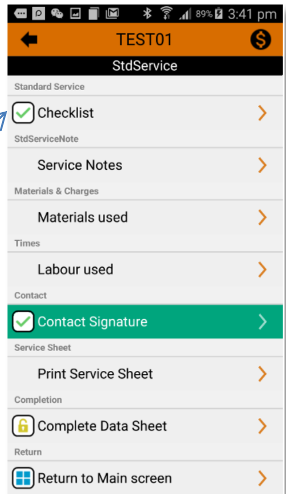
Then press "Customer Lookup", select the Customer, then select Template (if you have more than one). Else the default template will be used to create the datasheet. (In our example it is StdService.)



4. You can see that the DataSheet layout is defined by the style template.

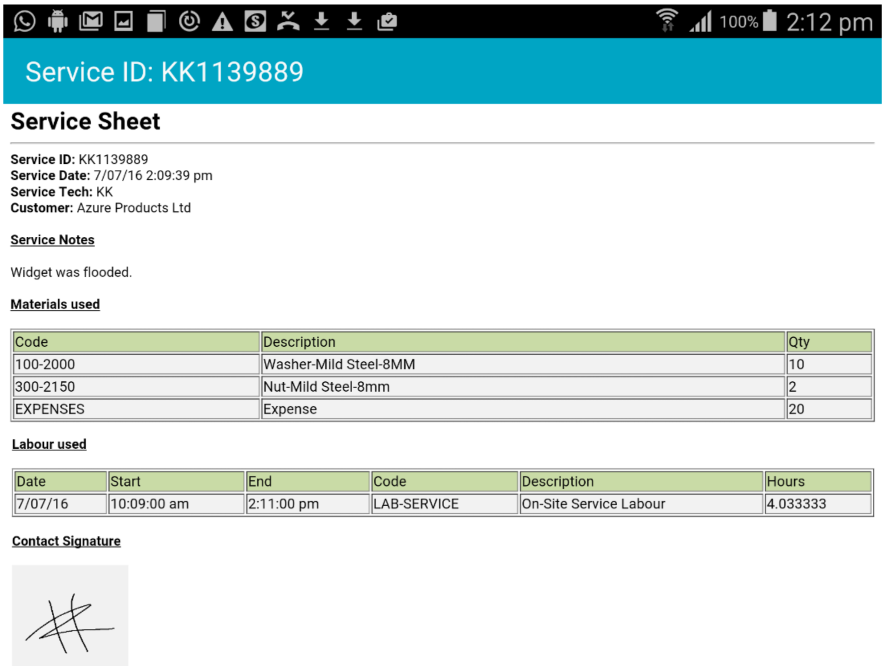


In our example, we made the CheckList and Signature mandatory. You will see a red cross next to it when first displayed. When it is done, the cross will change into a green tick.



5. Once all the mandatory items are completed, the Data Sheet for the job can be completed by selecting the "**Complete Data Sheet**".
   Once this is done, the Data Sheet is **ready for uploading**. This will be done immediately (if Sync Data sheet on Completion is turned on in Employee Mobility Settings) or when the mobile device is next synchronized with Ostendo.

6. If the Style Template has Print output defined, then you can print and/or email the output. Here is a sample of the HTML output:



2:12 pm

Service ID: KK1139889

Service Sheet

Service ID: KK1139889
Service Date: 7/07/16 2:09:39 pm
Service Tech: KK
Customer: Azure Products Ltd

Service Notes

Widget was flooded.

Materials used

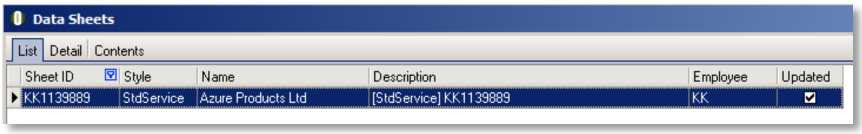
Code	Description	Qty
100-2000	Washer-Mild Steel-8MM	10
300-2150	Nut-Mild Steel-8mm	2
EXPENSES	Expense	20

Labour used

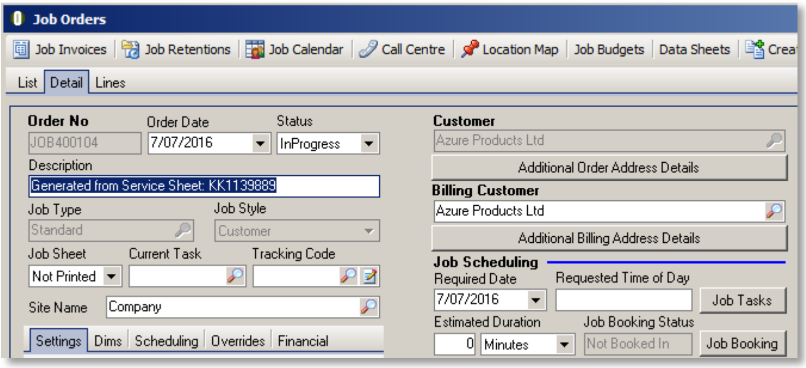
Date	Start	End	Code	Description	Hours
7/07/16	10:09:00 am	2:11:00 pm	LAB-SERVICE	On-Site Service Labour	4.033333

Contact Signature

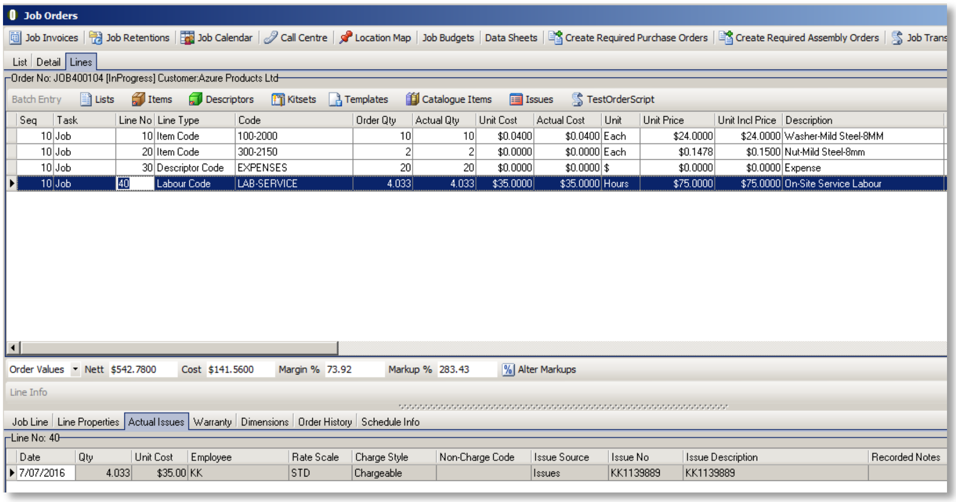
7. Reviewing the Data Sheet data in Ostendo:
   Go to Mobility → Data Sheets
   Click on Include Updated, and you will see all the Data sheets that have been uploaded.



   The Detail and Contents tabs will show the actual contents of each of the elements that make up the Data Sheet.
   Since the Style Sheet specifies that a new Actual Job is created when it is initiated via a customer selection, we should see the job automatically created in Job Orders screen:

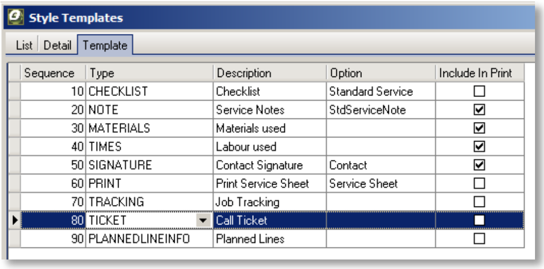


   And the Lines with Actuals updated as well:

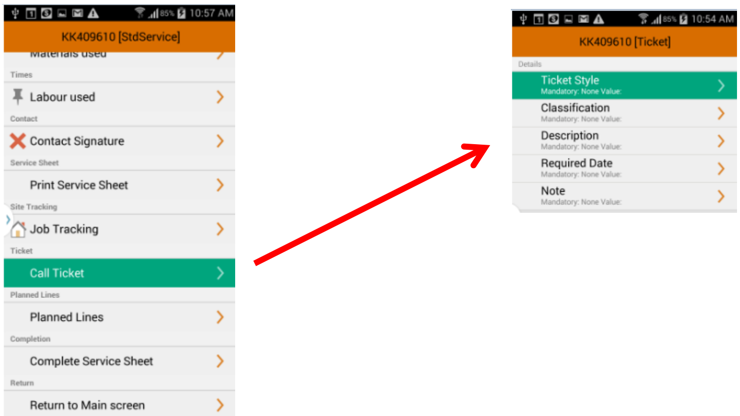


D. ADDITIONAL NOTES:

1. **Call Tickets**: If TICKET is added to a Style Template, then the user can create a Call Ticket from within a DataSheet. Call Tickets created will be added to the Call Centre when the DataSheet is synchronized with Ostendo. This could be used to generate follow-up visits.

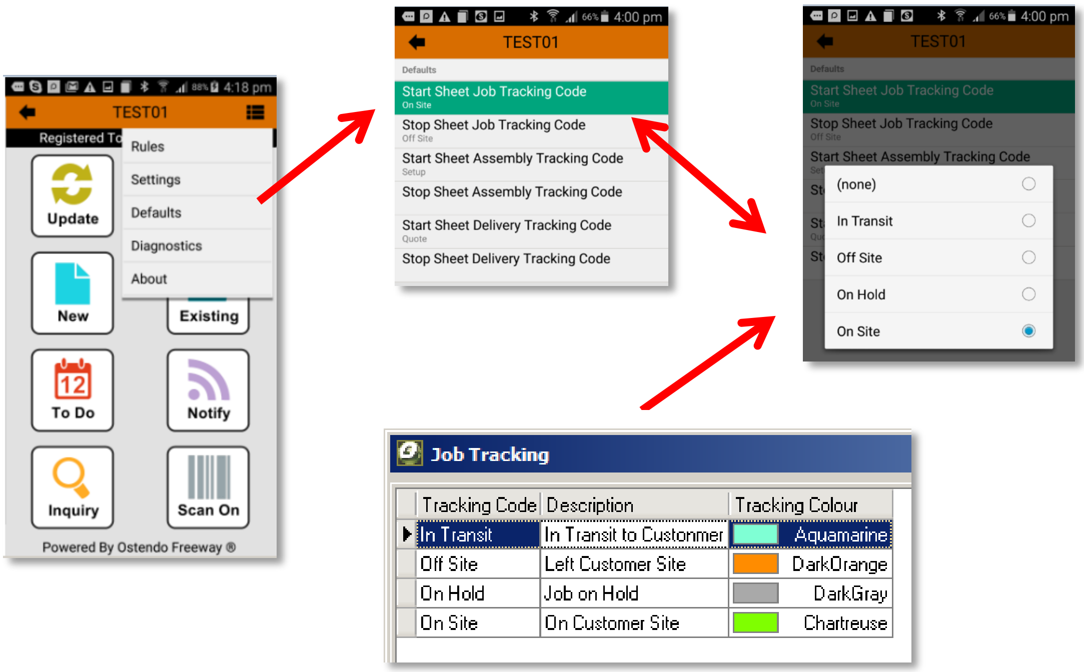


Sequence	Type	Description	Option	Include In Print
10	CHECKLIST	Checklist	Standard Service	☐
20	NOTE	Service Notes	StdServiceNote	☑
30	MATERIALS	Materials used		☑
40	TIMES	Labour used		☑
50	SIGNATURE	Contact Signature	Contact	☑
60	PRINT	Print Service Sheet	Service Sheet	☐
70	TRACKING	Job Tracking		☐
80	TICKET	Call Ticket		☐
90	PLANNEDLINEINFO	Planned Lines		☐



2. **Defaults – Tracking Codes**

Defaults allow the user to specify the Tracking Codes for when a DataSheet is created (Start Tracking Code) or when it is completed (Stop Tracking Code). This applies mainly to Job Tasks, Assembly Steps, and Delivery Orders.



Tracking Code	Description	Tracking Colour
In Transit	In Transit to Customner	Aquamarine
Off Site	Left Customer Site	DarkOrange
On Hold	Job on Hold	DarkGray
On Site	On Customer Site	Chartreuse

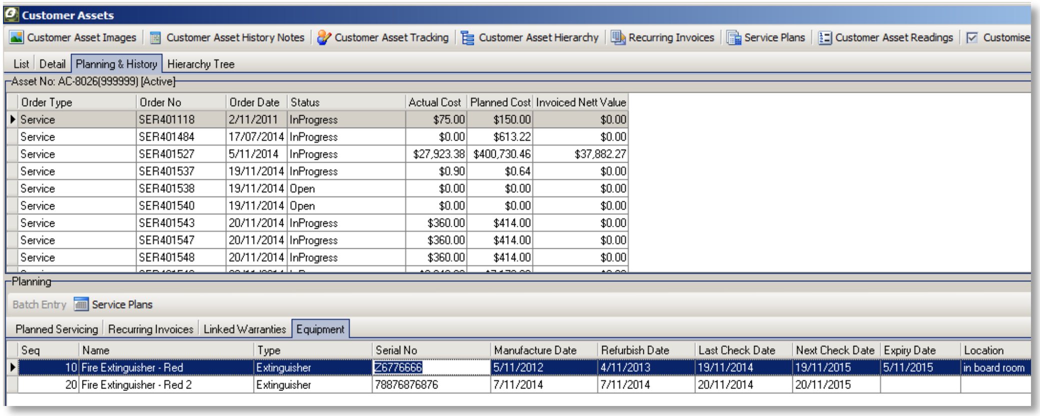
3. **Barcode**: For Barcode reading on Android devices, you need to download the free "Barcode Scanner" app by ZXing Team from Google Play Store. You can also pair a Bluetooth scanner to use with the app if you have one.

4. **Audio**: To play audio recordings on your computer, you need to install Apple QuickTime Player (free from Apple).

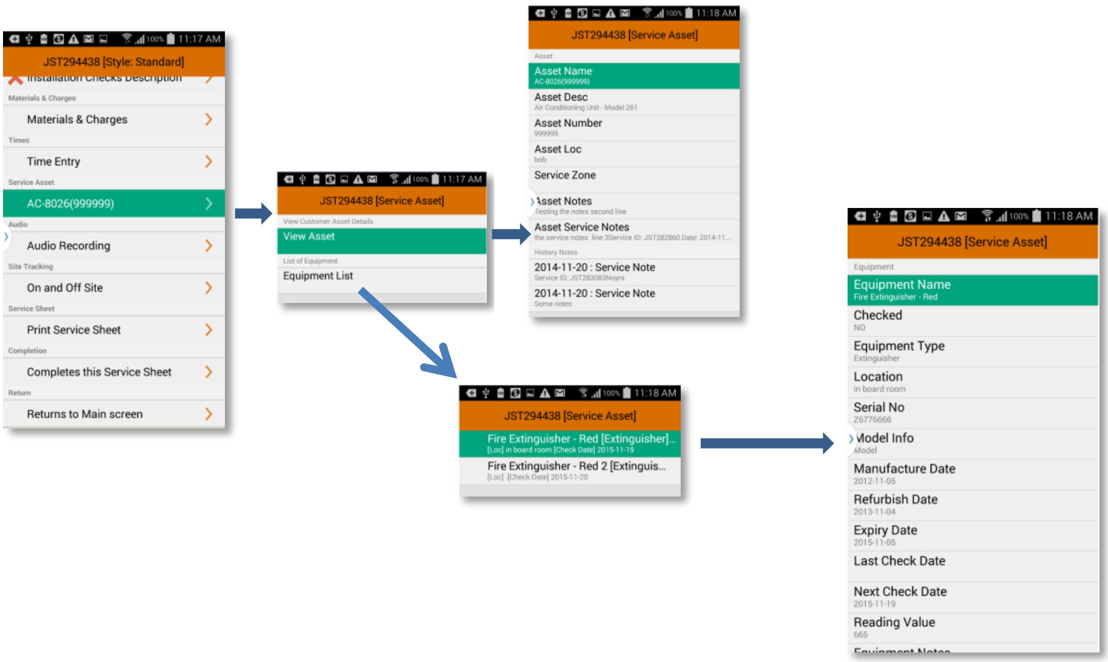
5. **Sync Mode**: **Standard Sync** or **Re-Initialize Data**.
   Standard Sync - only changes to jobs/customers/assemblies, etc. since the last sync is pulled back.
   Re-Initialize Data means everything (including templates, etc.) is synchronized. Use this mode if you made changes which alter the way the template/app works.

6. **Assets and Equipment List**:

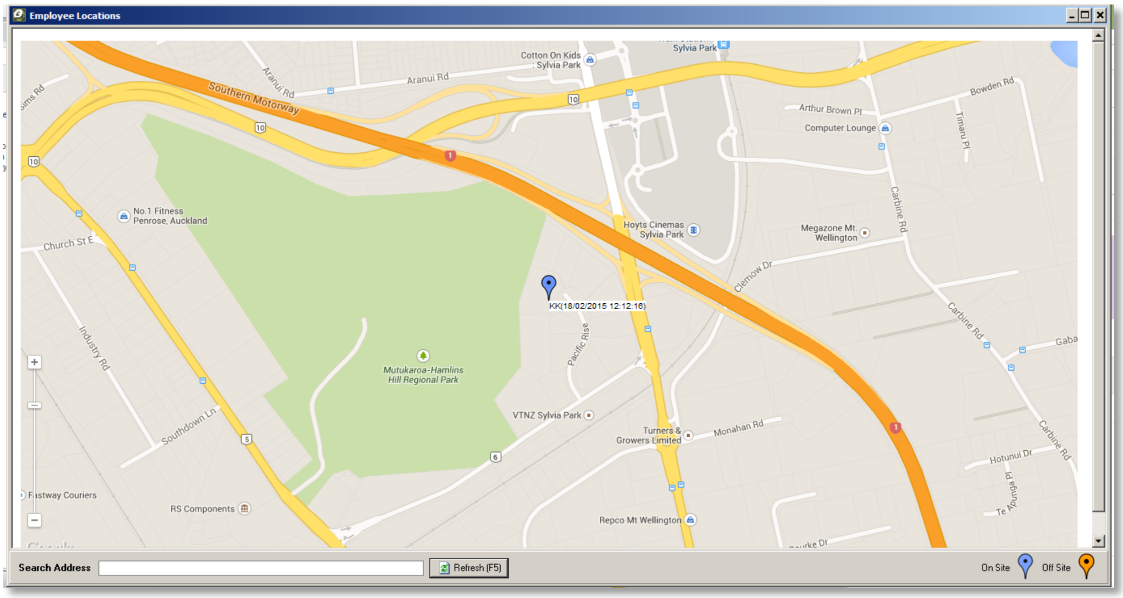
   a. You can define a list of equipment (e.g. fire extinguishers) under an Asset



   An asset could be a building or campus, etc. A service job could be defined for this asset with a list of equipment to be serviced or inspected.

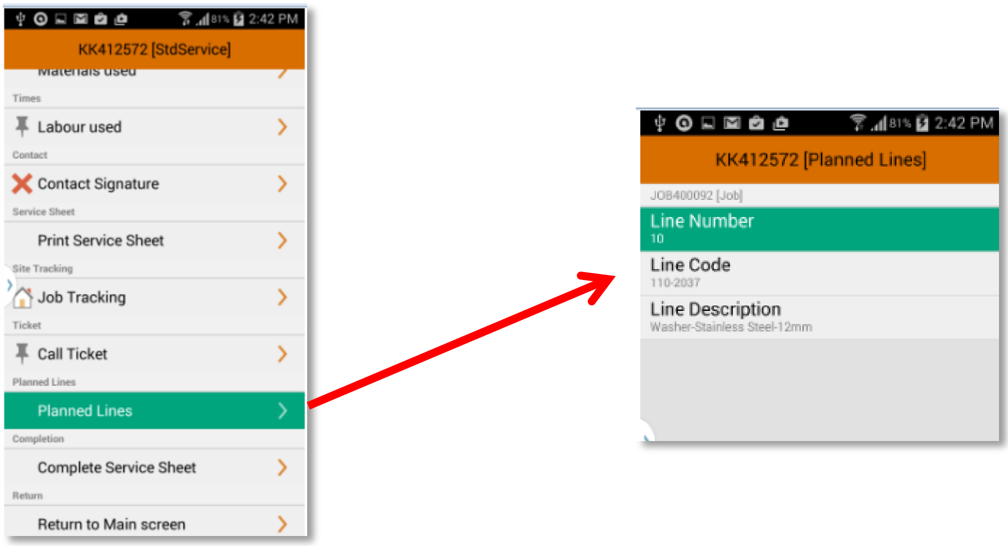


7. **Employee Locations**: Clicking on this item in the Ostendo Mobility menu will show you a map of the employee's last known location. Blue pin means on site and orange pin means off site.



In **Mobility Rules**, you can set the **Refresh Interval** (in minutes) to update this display after the specified time. You can also set a view **Horizon**. This will determine how far back in time (hours) the app will retrieve the employee's location data.

8. **Planned Job Line Info:** In Mobility Settings menu, this function will allow you to add any jobline field to display in addition to the default fields (LineNumber, LineCode, LineDescription). Planned Job Line Info needs to be added to a style template to display those fields.

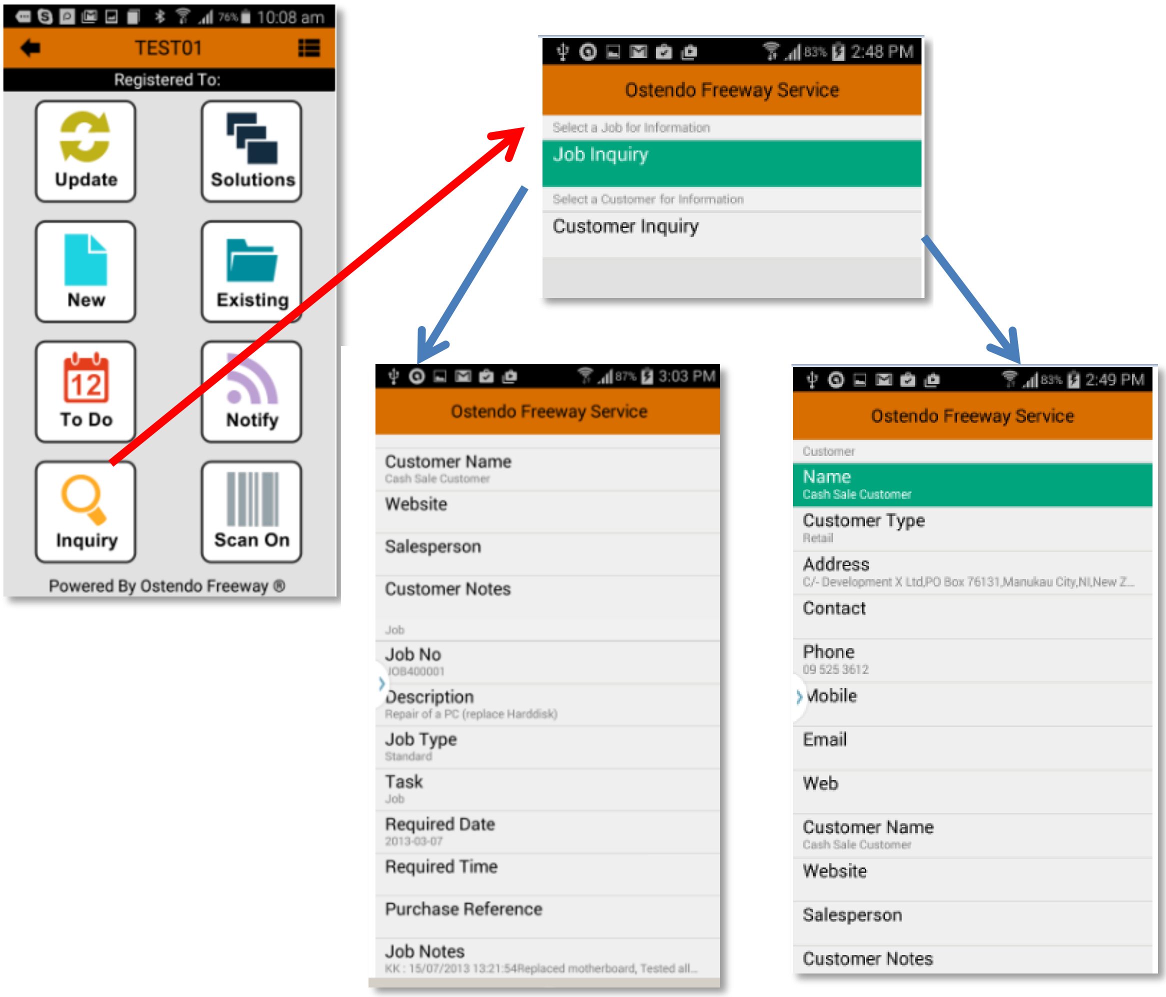


9. **Adding fields to Standard Inquiries:** The Freeway app have a set of standard inquiries for Jobs, Customers, Suppliers, Assemblies, and Deliveries. You can add more fields by going to Mobility Settings menu and selecting any of the following:
   - Job Info Fields
   - Customer Info Fields
   - Supplier Info Fields
   - Asset Info Fields
   - Assembly Info Fields
   - Delivery Info Fields

   These functions allow you to add additional fields to standard inquiries.

Job Info Fields

Field Name	Field Caption
SALESPERSON	SalesPerson



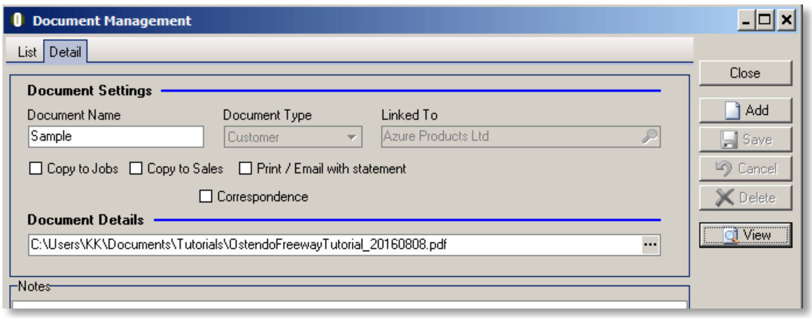
10. **Linked Table Info Fields:** In addition to the above, this function allows you to add fields to the standard inquiries from other tables which are related to these main tables.

Linked Table Info Fields

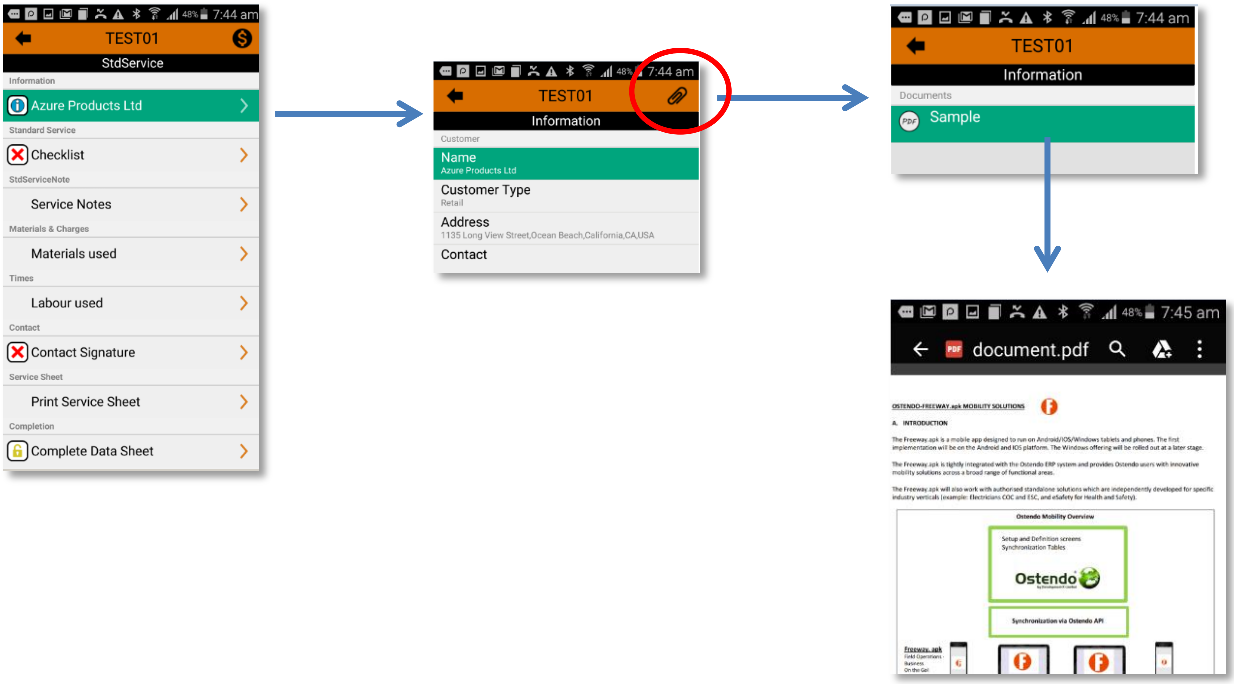
Linked Style	Linked to Field Style	Source Table Name	Source Key Field	Source Data Field	Field Caption
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLCONTACT	Contact Name
Customer	Primary Field	CALLNOTES	COMPANYNAME	TICKETID	TicketID
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLSTATUS	Status
Customer	Primary Field	CALLNOTES	COMPANYNAME	CALLBRIEFDESCRIPTION	Description
Customer	SYSUNIQUEID	OSTDEF_TESTASSET	HEADERSYSUNIQUEID	ASSETNAME	Asset

If there is a one-to-many relationship, then only fields from the latest record will be shown. The tables can be linked either via the Primary (Key) Field or via the SYSUNIQUEID value.

11. Viewing Related Documents: If there are documents linked to jobs or customers, these can be accessed by the Freeway.apk . If the documents are stored in a **mapped drive**, ensure that the mapped drive is defined in the Mobility Paths in Mobility Settings.



To access the document from the Customer datasheet in the Freeway app, click on Information; then click on the "paperclip" at the top right corner. This will display all linked documents for the customer. Clicking on the document will allow you to download and view the document on your mobile device.



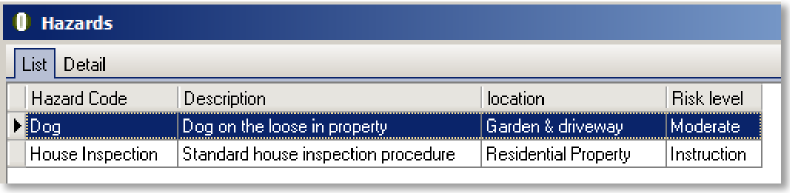
The same process applies to Jobs, Suppliers, Assemblies and Deliveries.

12. Note Names – Include Materials / Times: If you tick "Include Materials in Note" or "Include Times in Note" then this data will also be appended to the notes when the data sheet is completed and sent back to Ostendo.

Note Names

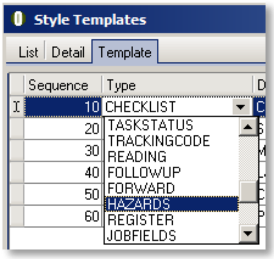
Note Name	Description	Include Materials in Note	Include Times in Note	Copy to Customer Notes	Copy to Customer History Notes	Copy to Direct Invoice Notes	Copy to Job Notes	Cop
ActivityNote	Activity Note	☐	☐	☐	☐	☐	☑	
QANote	Quality Assurance Notes	☐	☐	☐	☐	☐	☐	
ShedNote	Shed Notes	☐	☐	☐	☐	☐	☑	
StdServiceNote	Standard Service Notes	☑	☑	☑	☐	☐	☑	

13. **Hazards and Instructions** : In Ostendo – GENERAL menu, you can define a list of Hazards and Instructions.



Hazards and Instructions can be linked to Customers and Jobs/JobTasks via the Related button.
For Bill of Materials, they can be linked via the Hazards sub-tab in the Detail tab.

In Mobility Menu – Style Template, hazards and instructions can be included using the Hazards template type.



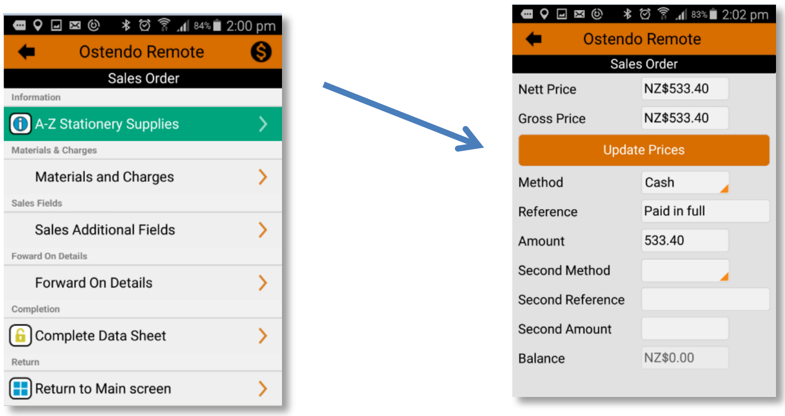
For example, if the template is used for a Service Job, and the Job or Customer has hazards and/or instructions linked to it, then including Hazards in the template will automatically display all the linked hazards and instructions. If both the Customer and the Job have hazards and instructions, then both will be shown on the Freeway app.

Typical hazards for Customer will be site related (e.g. dangerous chemicals stored on site); while for jobs it could be the kind of tools used (e.g. scaffolding or ladders).

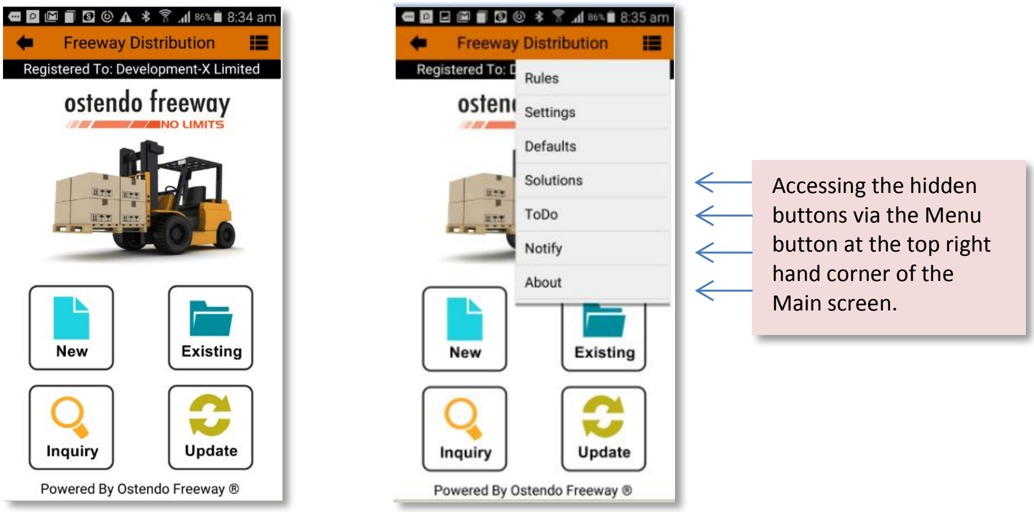
Hazards are listed first in order of Risk Level (Extreme,High,Moderate,Low), followed by Instructions.

14. **Allow Payment Entry** : In Employee Mobility Settings – Customers & Jobs subtabs, you can tick this option to allow the mobility user to accept payments from customers.

For example, if the mobility user is creating a Sales Order and he is allowed to accept payment for the order, he will see a $ icon at the top right corner of his Sales Order template. Clicking on the $ icon will bring up a screen to accept a payment.



15. **Main Screen Layout:** In Employee Mobility Settings you can add a background image to the Main Screen (like a wallpaper) as well as re-arrange the buttons. You can also hide or display any of the buttons. In the following example, the buttons are re-arranged and the top four buttons are hidden. Hidden buttons can still be accessed via the Menu button at the top right hand corner of the Main Screen.

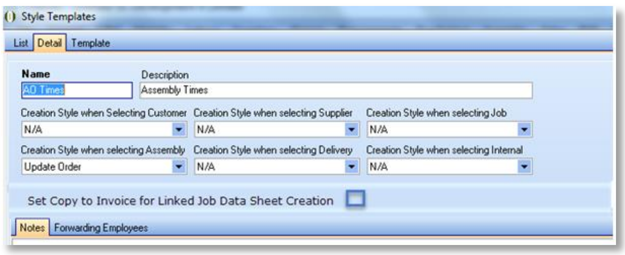


Please refer to Ostendo Reference Help – Employee Mobility Settings – Device Tab for details on how to load the background images (for portrait and landscape) and how to re-arrange the buttons.

16. **Automatic Creation of Linked Data Sheet pdf:** In **Mobility Rules** if a date is selected for "***Create Data Sheet Linked Docs From"***, then each time a data sheet is completed on the mobile device and is synchronized back to Ostendo, the system will automatically create a Data Sheet pdf and link it to the Job / Assembly / Sale / Purchase / Invoice.

Note that a **Parent Folder Path** must also be specified in **General Rules** and a **DataSheet** Queue Type is defined in **Queue Service** before this can happen.

Additionally, if the "***Set 'Copy to Invoice' for Linked Job Data Sheet Creation***" is also ticked, then that flag will also be ticked when the linked document is created.

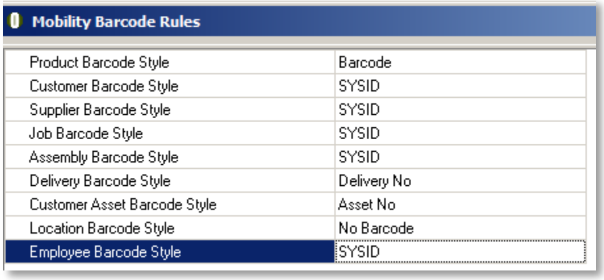


17. Settings relating to Scan On Button:

Scan On button can be used for the following types of barcodes:

- Customers
- Suppliers
- Jobs
- Assemblies
- Customer Assets
- Deliveries
- Employees

If used, **Mobility Barcode Rules** (in Mobility – Settings) must be defined for each of these types.



For Job Barcode, use the ***JOBTASKS'*** *SYSUNIQUEID.*
For Assembly Barcode, use the ***ASSEMBLYSTEPS'*** *SYSUNIQUEID.*

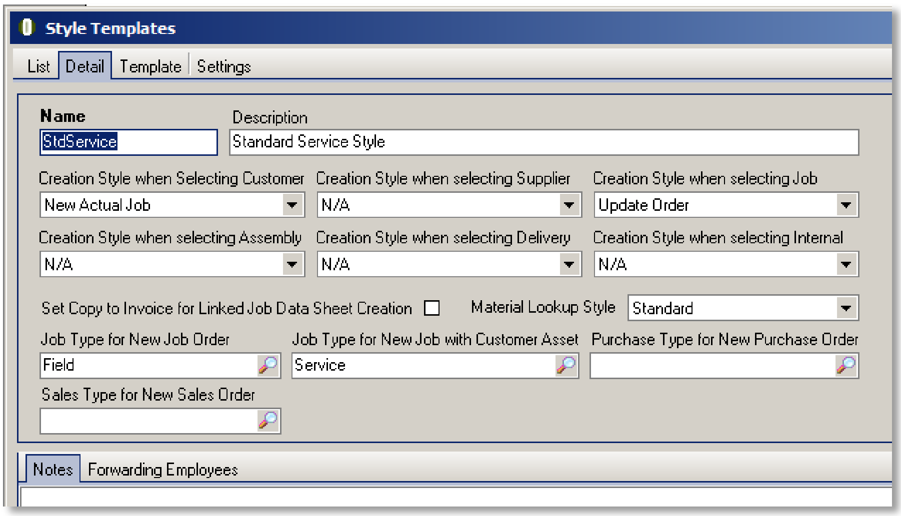
Next, in **Employee Mobility Settings**, the following rules must be set in order for the Scan On button to know which Style Template to use when a barcode is scanned:

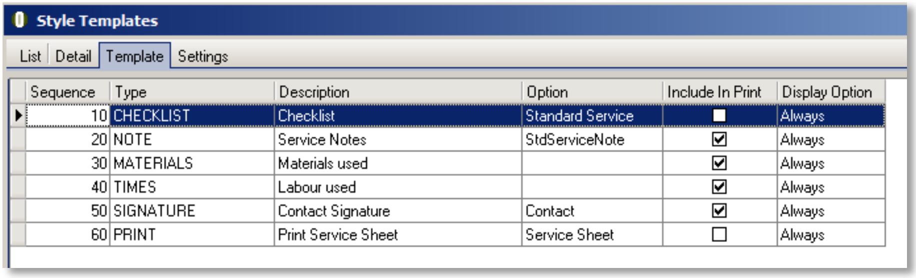
Device tab:	(Employee barcode)	**Fixed Internal Style Name for Scanning**
Customers tab:	(Customer barcode)	**Fixed Customer Style Name for Scanning**
Jobs tab:	(Job barcode)	**Fixed Job Style Name for Scanning**

Suppliers tab:	(Supplier barcode)	**Fixed Supplier Style Name for Scanning**
Assemblies tab:	(Assembly barcode)	**Fixed Assembly Style Name for Scanning**
Deliveries tab:	(Delivery barcode)	**Fixed Delivery Style Name for Scanning**

E. SAMPLE TEMPLATES:

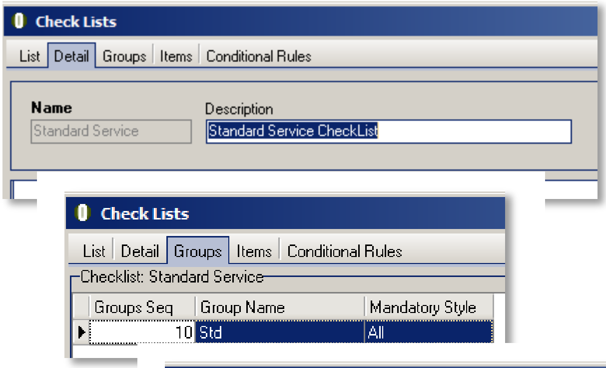
1. Service jobs



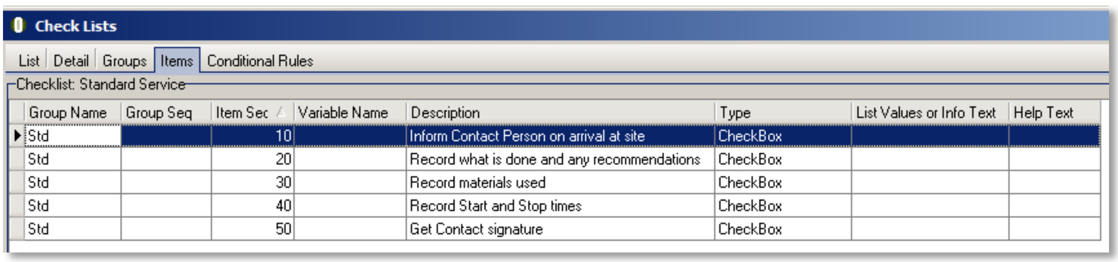


NoteName: StdServiceNote
-copy to CustomerNotes
-copy to JobNotes
-copy to AssetNotes

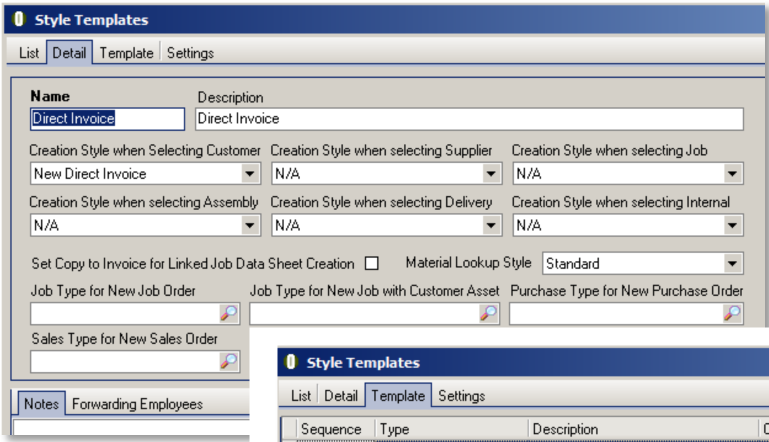
SignatureName: Contact
-Mandatory



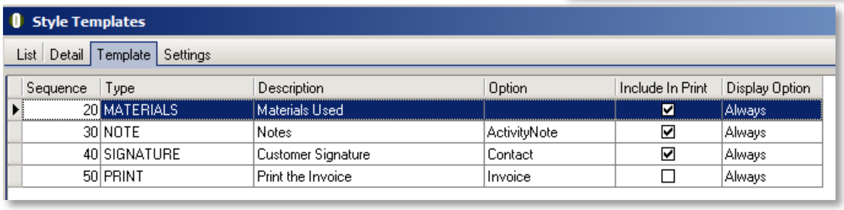
PrintName: Service Sheet
-Default Email to INTERNAL



2. Direct Invoice



NoteName: ActivityNote
-copy to CustomerNotes



PrintName: Invoice
-Default Email to EXTERNAL
-Email Image Files
-Display Prices
-Override HTML Code

SignatureName: Contact
-Mandatory

<u>Override HTML Code for PrintName: Invoice</u>

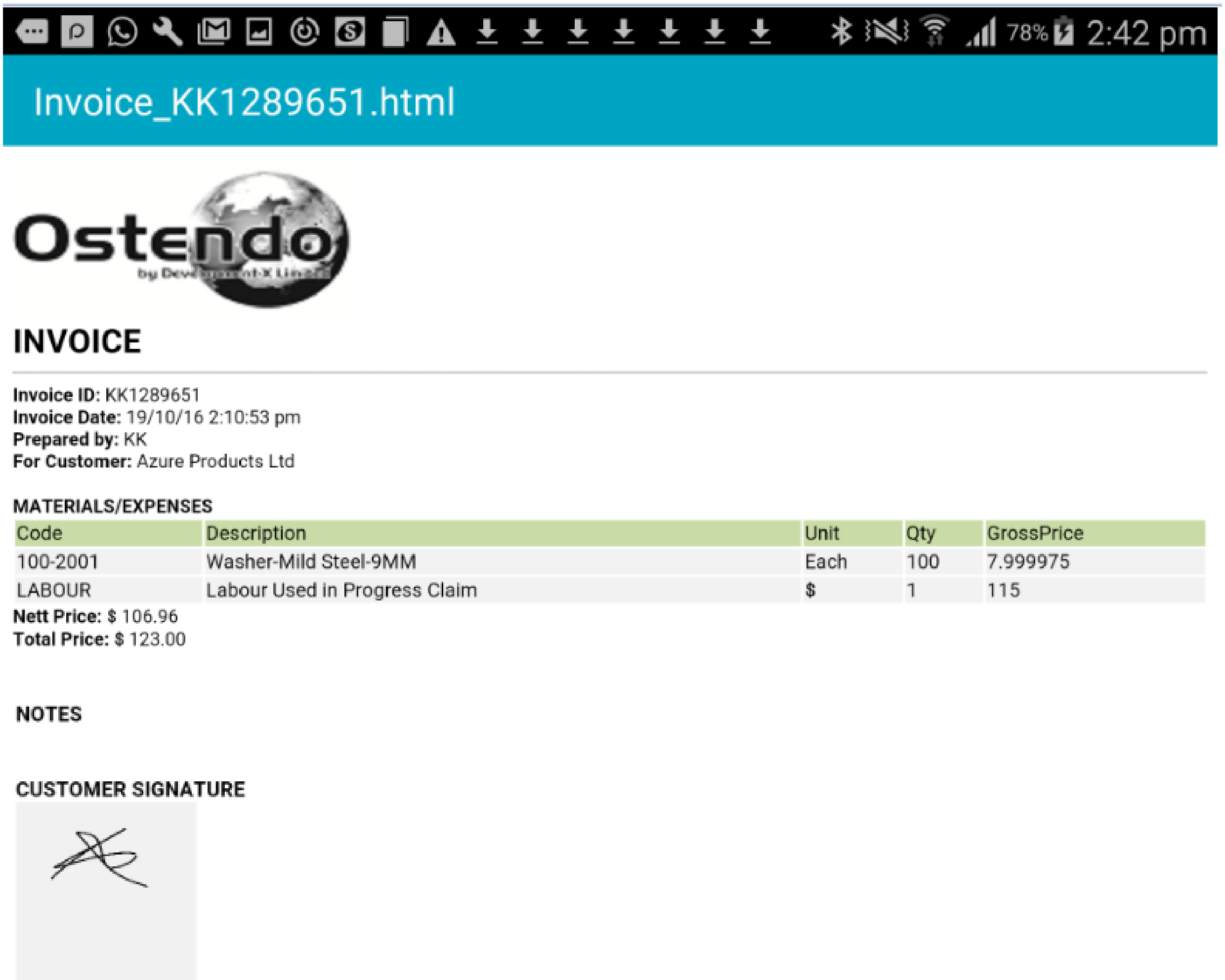
```
<head><title>[[TABLE=MOBILESERVICEIMAGES|FIELD=IMAGEBLOB|TYPE=IMAGE|ATTRIBUTES=width="280"
height="130"|KEYFIELD=IMAGETYPE|KEYVALUE=Company Logo]]
<br>
</title><span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 20pt;">
</font>
<b>INVOICE<b></span><hr />
</head>
<body>
<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;">
<b>Invoice ID:
</b>[[TABLE=SERVICESHEETSUMMARY|FIELD=SERVICEID|TYPE=VALUE|KEYFIELD=SUBJECTTYPE|KEYVALUE=INFO]]<br>
<b>Invoice Date:
</b>[[TABLE=SERVICESHEETSUMMARY|FIELD=RECORDTIMESTAMP|TYPE=VALUE|KEYFIELD=SUBJECTTYPE|KEYVALUE=INFO]]<br>
<b>Prepared by:
</b>[[TABLE=SERVICESHEETSUMMARY|FIELD=EMPLOYEENAME|TYPE=VALUE|KEYFIELD=SUBJECTTYPE|KEYVALUE=INFO]]<br>
<b>For Customer:
</b>[[TABLE=SERVICESHEETINFO|FIELD=ACTUALFIELDTEXT|TYPE=VALUE|KEYFIELD=ACTUALFIELDCAPTION|KEYVALUE=Customer]]<
br>
</span>

<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;">
<br>
[[TABLE=SERVICESHEETMATERIALS|FIELDNAMES=LINECODE,LINEDESCRIPTION,LINEUNIT,LINEQTY,EXTENDEDGROSSPRICE|TYPE=TAB
LE|HEADINGS=Code,Description,Unit,Qty,GrossPrice|ATTRIBUTES=width="100%;"
<caption><b>MATERIALS/EXPENSES</b></caption>]]<br>
</span>

<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;">
<b>Nett Price:
</b>[[TABLE=MOBILESERVICERULES|FIELD=SUBJECTSUBCAPTION|TYPE=VALUE|KEYFIELD=RECORDTYPE|KEYVALUE=CURRENCYSYM
BOL]]
[[TABLE=SERVICESHEETHEADER|FIELD=EXTENDEDNETTPRICE|TYPE=VALUE|DISPLAYFORMAT=#,##0.00]]<br>
<b>Total Price:
</b>[[TABLE=MOBILESERVICERULES|FIELD=SUBJECTSUBCAPTION|TYPE=VALUE|KEYFIELD=RECORDTYPE|KEYVALUE=CURRENCYSYM
BOL]]
[[TABLE=SERVICESHEETHEADER|FIELD=EXTENDEDGROSSPRICE|TYPE=VALUE|DISPLAYFORMAT=#,##0.00]]<br>
</span>
```

```
<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;">
<b><br>NOTES</b><br>
[[TABLE=SERVICESHEETNOTES|FIELD=NOTEBLOB|TYPE=VALUE|KEYFIELD=NOTENAME|KEYVALUE=ACTIVITYNOTE]]<br>
</span>

<span style="font-family: 'Century Gothic'; font-weight: normal; font-style: normal; text-decoration: none;font-size: 11pt;">
<b><br>CUSTOMER SIGNATURE</b><br>
[[TABLE=SERVICESHEETSIGNATURES|FIELD=SIGNATURE|TYPE=IMAGE|ATTRIBUTES=width="130"
height="130"|KEYFIELD=SIGNATURENAME|KEYVALUE=Contact]]<br>
</span></body>
```


Invoice_KK1289651.html

INVOICE

Invoice ID: KK1289651
Invoice Date: 19/10/16 2:10:53 pm
Prepared by: KK
For Customer: Azure Products Ltd

MATERIALS/EXPENSES

Code	Description	Unit	Qty	GrossPrice
100-2001	Washer-Mild Steel-9MM	Each	100	7.999975
LABOUR	Labour Used in Progress Claim	$	1	115

Nett Price: $ 106.96
Total Price: $ 123.00

NOTES

CUSTOMER SIGNATURE

PART 2 : Ostendo Freeway – Conditional Checklist Primer

Introduction

Ostendo Freeway is an easy-to-use framework to build mobility solutions for a variety of businesses and organisations. One of the key components of this framework is Conditional Checklists. Conditional Checklists can be used to create mobile apps to help users follow a pre-defined process to carry out such tasks as problem diagnosis, compliance certifications, custom product configuration, quality assurance, and so on.

A checklist is a pre-defined list of questions or pointers to guide a user and ensure that he/she follows a disciplined and consistent approach to the task at hand. Conditional Checklists makes the process dynamic. Depending on the answers to the preceding questions, the Conditional Checklist can take a variety of paths so that the relevant set of questions are asked and responded to, depending on the actual situation being addressed.

Conditional Checklists help ensure that:

1. Service/Sales personnel offer consistent quality service regardless of their experience.
2. Problems are diagnosed, quality assured, or products configured efficiently without having to go through each and every question in the Check List.
3. Companies can continuously improve their processes by fine-tuning their checklists based on past experience.

Ostendo Freeway offers companies the opportunity to tailor-make mobility solutions based on their unique business requirements. Over time, as requirements changes or as experience is gained, the Ostendo Freeway mobility solution can be fine-tuned accordingly. Such changes can be made in-house or with the help of their Ostendo consultant. Ostendo Freeway gives businesses and organisations the capability to continually hone their own competitiveness/effectiveness in their respective marketplace.

We have put together the following examples to illustrate how Conditional CheckLists can be put to practical use:

1. Generator Test – a simple quality assurance checklist.
2. Shed Estimator – illustrates how a Conditional Checklist can be used to configure and compute the price of a custom built product.
3. Car Overheating Diagnostic – shows how a set of checklists can be put together to do problem diagnostics and resolution.
4. Heat Pump Selector – shows how checklists can be organized to calculate requirements based on room dimensions and select the appropriate Heat Pump model.

> ***Note: It is recommended you go through the examples in the above sequence as the detailed explanations are in the first example. Subsequent examples assume you are familiar with what is already explained in earlier examples.***

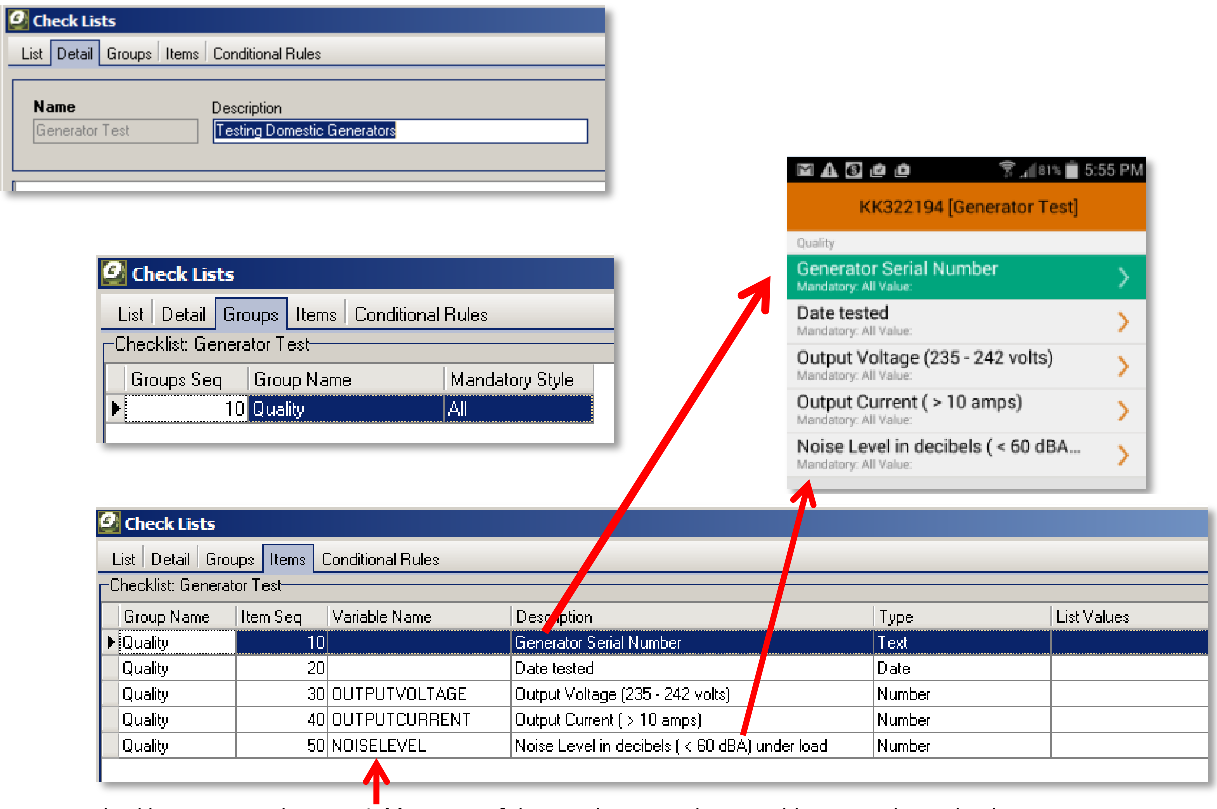
Example 1: Generator Test

XYZ Generators Ltd wishes to ensure that all their domestic generators meet the following technical specifications before they are sold:

a. Output Voltage must be >= than 235 volts and <= 242 volts.
b. Output Current must exceed 10 amps.
c. Noise level of Generator when run at load must be less than 60 decibels.

A Quality Assurance template and checklist can easily be created in Ostendo Freeway to handle such requirements.

1. Go to Mobility → Check Lists to create a new checklist called Generator Test. As it is a straight forward set of tests, we can put all the check items into one group.



*Checklist Items can have **variable names** if they are being used as variables in Conditional Rules.*

Items tab:
Group Name must be defined in Groups tab. Every item must have a valid Group Name.
Item Seq determines the sequence in which the Checklist items are displayed in the mobile app.
Variable Name is optional.

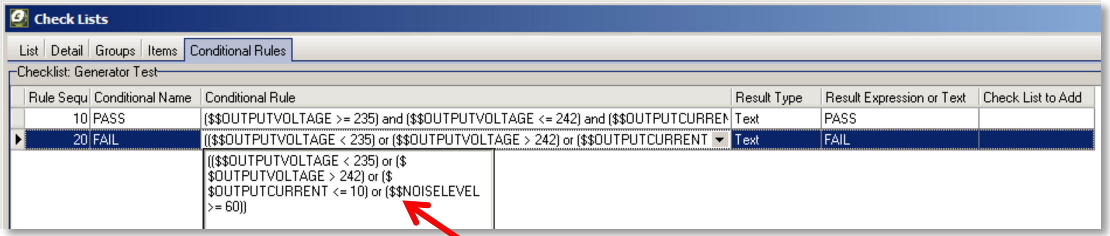
A variable name is *required only if* the variable will be utilised in a conditional rule.
Variable names must ***not*** be the ***same as*** the Item Seq.
Variable Names must be ***unique*** across *all* checklists.

Description – This is what will be displayed in the mobile app's checklist.
Type – Checklist item types could be :

Checkbox / Group CheckBox
Text / Memo / List / Info
Number / Integer
Date / Time
Signature / PhotoNote

List Values - If the Type is List, then all the list values are entered here.

Conditional Rules tab:



When used as a variable in a conditional rule, the Variable Name must be preceded by two dollar signs ($$).

As checklist items are being responded to in the Freeway mobile app, the app will continuously check if any of the conditional rules are satisfied. If satisfied, the app will either display a result or branch off to another checklist.

Note: We should not leave any Conditional Rule blank as this will always be true before any data is entered.

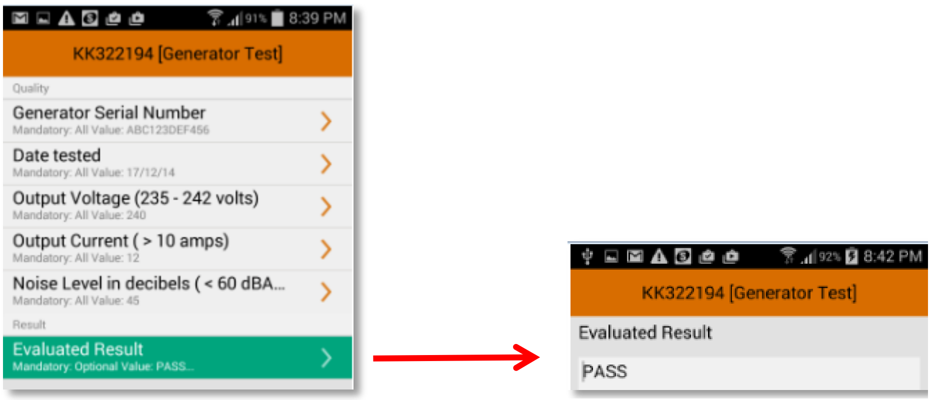
Rule Sequence: determines the sequence the rules are applied. Once a rule is satisfied, the remaining rules will be ignored.
Conditional Name: a user-defined name for the rule.
Conditional Rule: In this example, all three requirements (OutputVoltage, OutputCurrent, NoiseLevel) must be met before the generator is deemed to have passed the quality check.
This is expressed in the **Conditional Rule** called PASS:

($$OUTPUTVOLTAGE >= 235) and ($$OUTPUTVOLTAGE <= 242) and ($$OUTPUTCURRENT > 10) and ($$NOISELEVEL < 60)

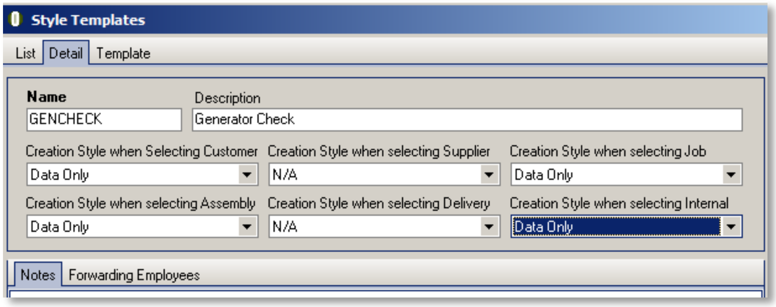
The second condition in this example is FAIL when any of the requirements are not met:

(($$OUTPUTVOLTAGE < 235) or ($$OUTPUTVOLTAGE > 242) or ($$OUTPUTCURRENT <= 10) or ($$NOISELEVEL >= 60)

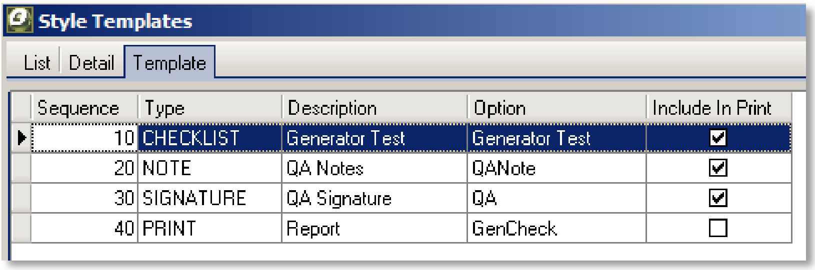
Result Type: If this rule is not branching off to another CheckList, then the type could be either an **Expression** or **Text**. Text is simply some words that will be displayed, while Expression is a formula to be computed.
Result Expression: If this rule is not branching off to another CheckList, then either the text or expression is entered here. In this example, the word 'PASS" or "FAIL" is the text entered here. If Result Type is an Expression, then an expression (formula) would be entered in this column. This column is left blank if the rule is branching off to another CheckList.
CheckList to Add: If the Result Type is neither an Expression nor a Text, then this column is used to enter the name of the CheckList to branch to.



2. Go to Mobility → Style Templates to create a new template called GENCHECK:



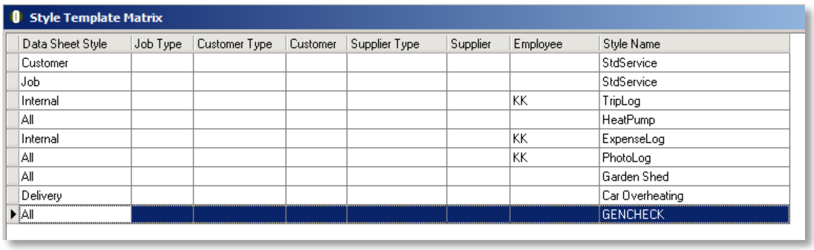
We will not create any job or invoice with this template. So select 'Data Only' for Creation Style when Selecting Customer / Job / Assembly / Internal



Sequence	Type	Description	Option	Include In Print
10	CHECKLIST	Generator Test	Generator Test	☑
20	NOTE	QA Notes	QANote	☑
30	SIGNATURE	QA Signature	QA	☑
40	PRINT	Report	GenCheck	☐

For this template, we will start with the Generator Test CheckList, followed by QA Notes and Signature. We also want to print a report for documentation purposes.
(Note: You need to have the Note name, Signature name, and Print name defined in Mobility Settings first.)

3. We now go to StyleTemplateMatrix to add a record so that we can select this GENCHECK template as well.

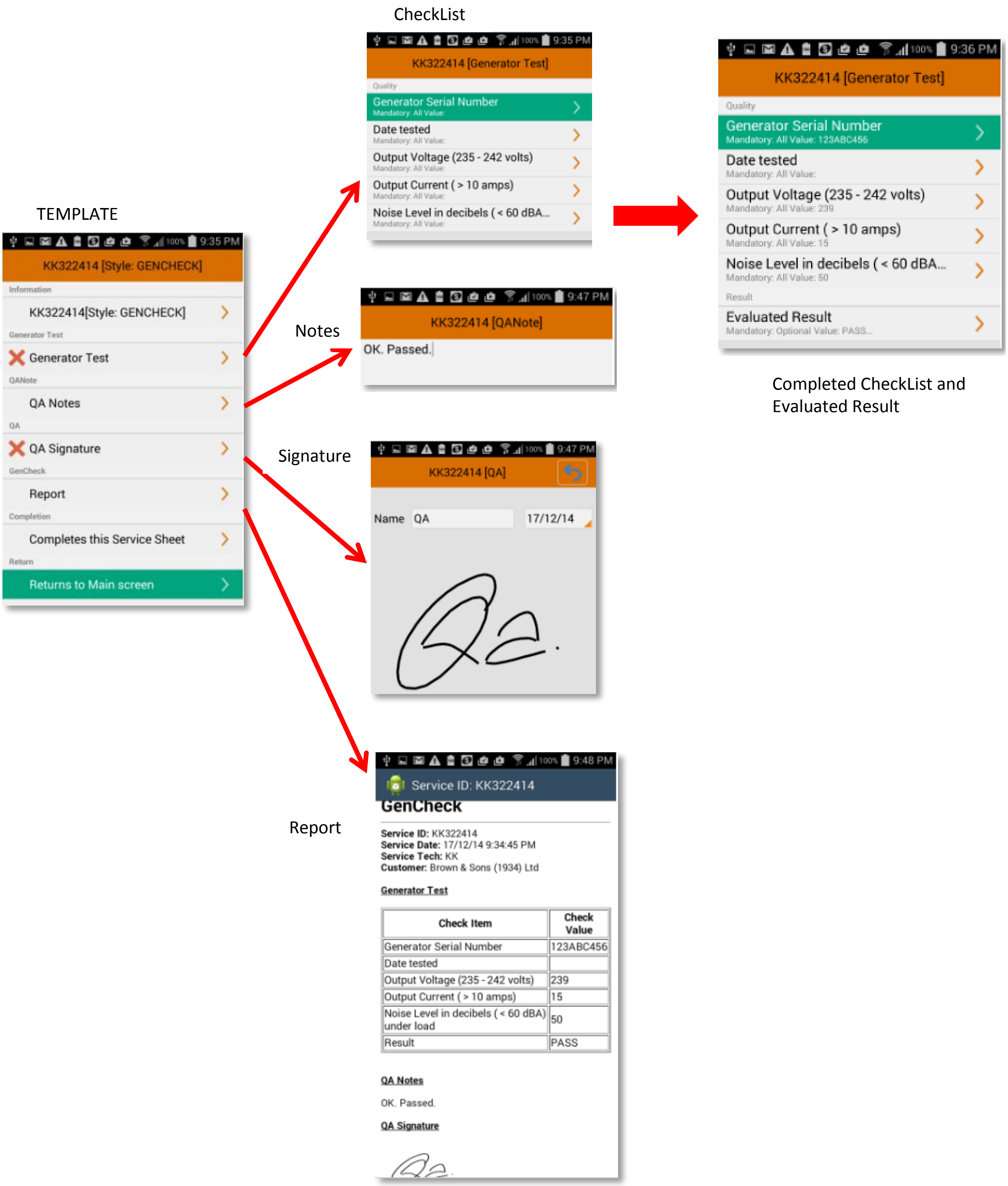


Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Customer							StdService
Job							StdService
Internal						KK	TripLog
All							HeatPump
Internal						KK	ExpenseLog
All						KK	PhotoLog
All							Garden Shed
Delivery							Car Overheating
All							GENCHECK

Note that even though DataSheet Style is "All", we have actually limited it to Customer, Job, Assembly, and Internal in step 2 above.

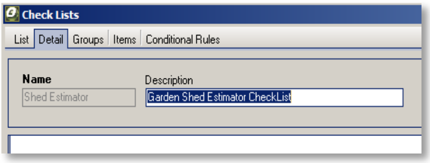
4. Now we should be able to synchronize our Freeway app on our mobile device to get this template from Ostendo.

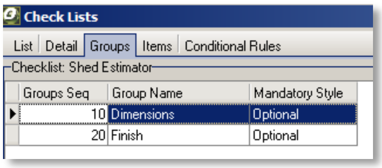
GENCHECK template in action:



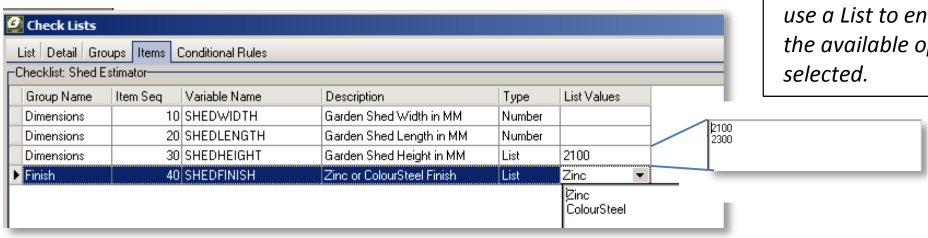
Example 2: Shed Estimator

In this example, the Price of a shed is based on its dimensions and type of finish.
It can be any length and any width, with two standard choices for Height (2100 mm or 2300 mm) and type of Finish (Zinc or ColourSteel).

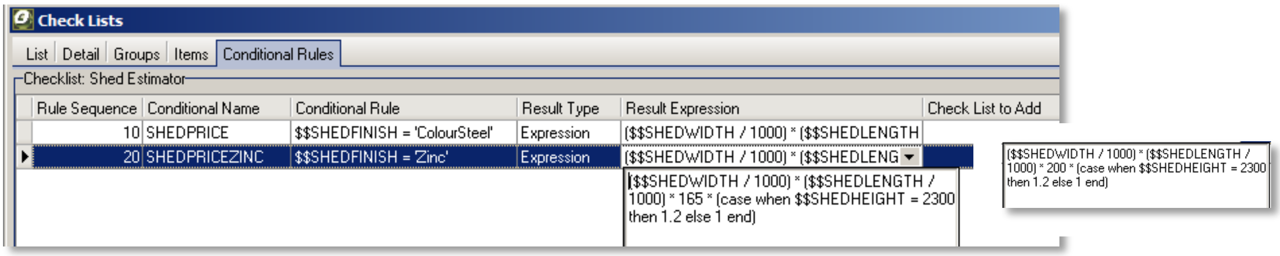




For Height and Finish, we use a List to ensure only the available options are selected.



Four Variable names are defined in this CheckList to compute the price.



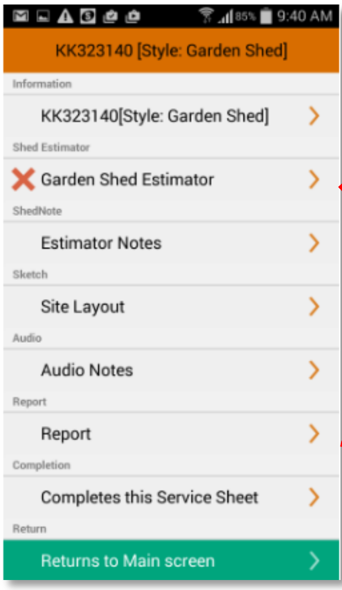
The price is computed based on the following formula:

If Finish = ColourSteel and Height = 2300, then Price = Width in Metres X Length in Metres X 200 X 1.2
If Finish = ColourSteel and Height = 2100, then Price = Width in Metres X Length in Metres X 200 X 1.0
If Finish = Zinc and Height = 2300, then Price = Width in Metres X Length in Metres X 165 X 1.2
If Finish = Zinc and Height = 2100, then Price = Width in Metres X Length in Metres X 165 X 1.0

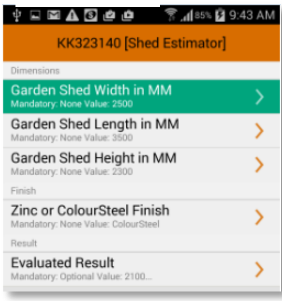
This is translated into two Conditional Rules (Finish = ColourSteel or Finish = Zinc).
The Result Expression uses a case statement to determine the factor to use based on Height selected.

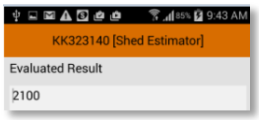
Shed Estimator Template in Action:

TEMPLATE



CheckList

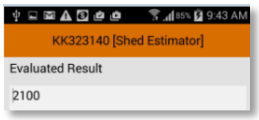




Report

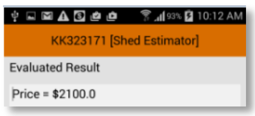
The expression
($$SHEDWIDTH / 1000) * ($$SHEDLENGTH / 1000) * 200 * (case when $$SHEDHEIGHT = 2300 then 1.2 else 1 end)

Will just produce a result like this



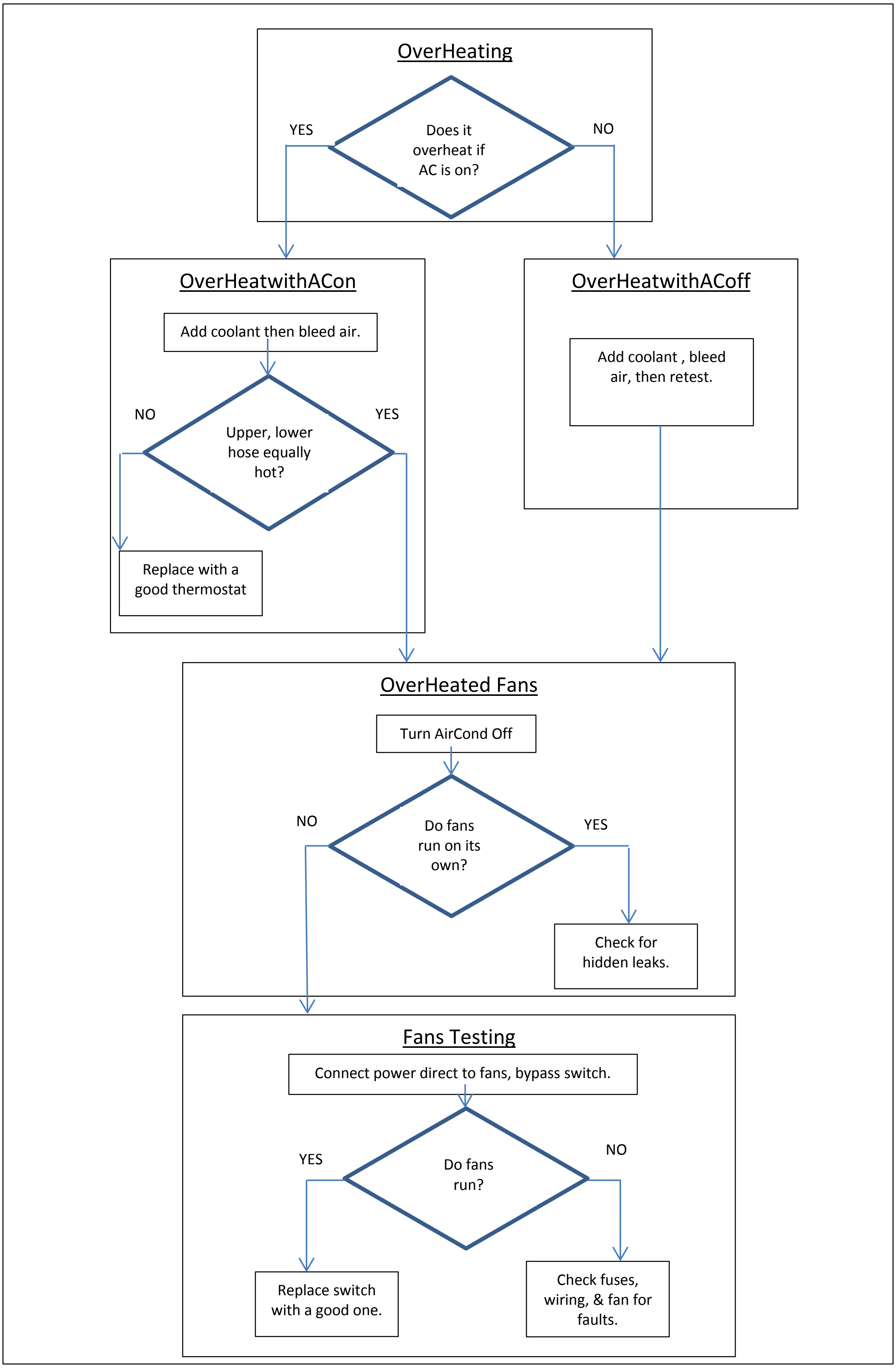
However if you cast the expression as TEXT and concatenate it to the string 'Price = $' like this:
'Price = $' || cast(($$SHEDWIDTH / 1000) * ($$SHEDLENGTH / 1000) * 200 * (case when $$SHEDHEIGHT = 2300 then 1.2 else 1 end) as TEXT)

Will present the result like this



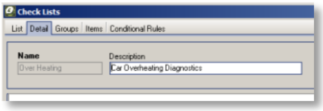
Example 3: Car Overheating Diagnostic

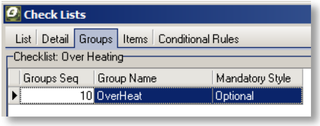
This example shows how a CheckList can branch off to another checklist.
Suppose you have the following documented flowchart for diagnosing Car Overheating problems.

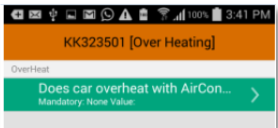


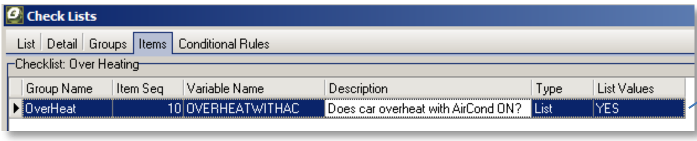
We can create 5 CheckLists to implement this flowchart:

The initial CheckList - **Overheating**

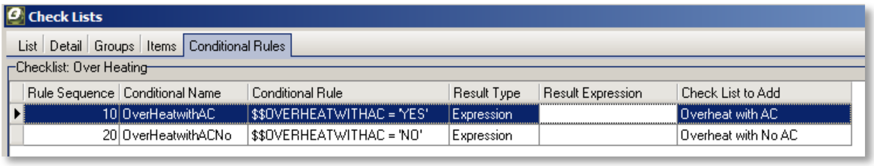




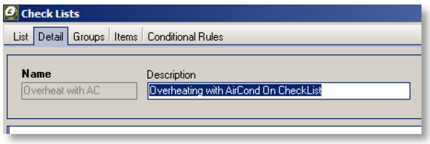


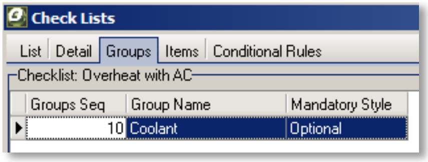


This question has two possible answers: YES or NO.
It then branches off to one of two possible CheckLists.

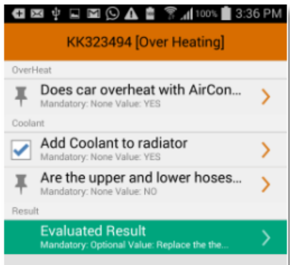


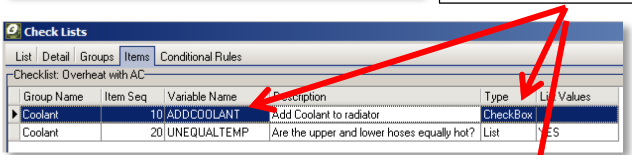
Next CheckList: Overheating with Aircon ON – **Overheat with AC**



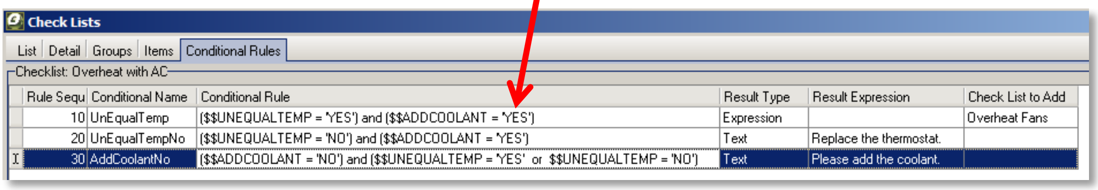


Note: A ticked CheckBox equals a YES and an unticked CheckBox equals a NO.



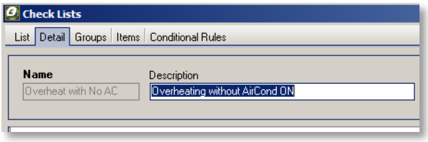


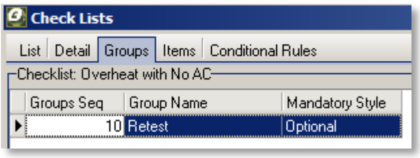
This CheckList could branch to another CheckList (Overheat Fans) or solve the problem by replacing the thermostat.



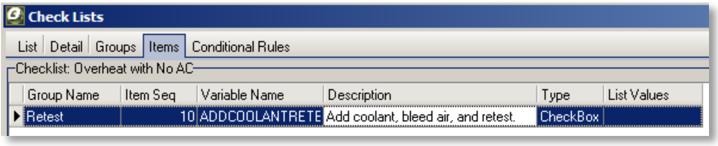
This last Rule is added just to prompt the user to perform the Add Coolant task and tick the CheckBox.

Next CheckList: Overheating even when Aircon is OFF – **Overheat with No AC**

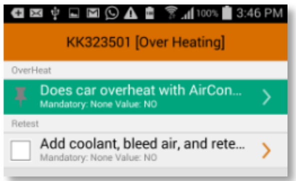


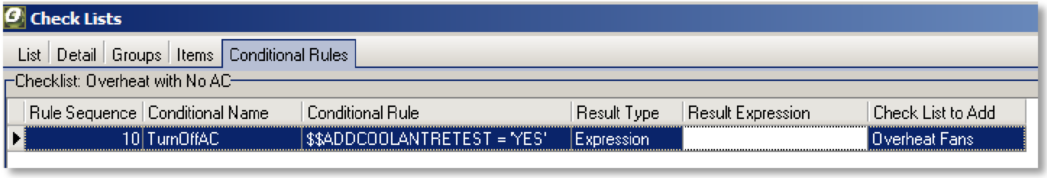


Groups Seq	Group Name	Mandatory Style
10	Retest	Optional



Group Name	Item Seq	Variable Name	Description	Type	List Values
Retest	10	ADDCOOLANTRETE	Add coolant, bleed air, and retest.	CheckBox	

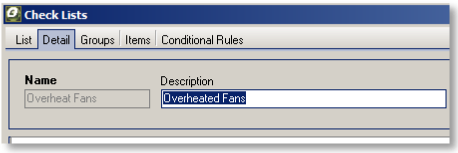


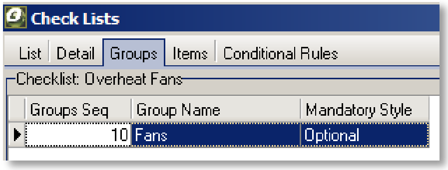


Rule Sequence	Conditional Name	Conditional Rule	Result Type	Result Expression	Check List to Add
10	TurnOffAC	$$ADDCOOLANTRETEST = 'YES'	Expression		Overheat Fans

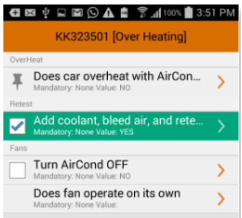
This CheckList branches off to another checklist after the task is done.

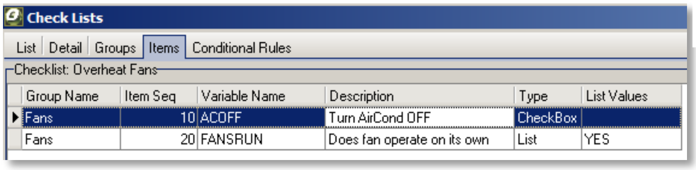
Next CheckList: Checking Overheated Fans – **Overheat Fans**





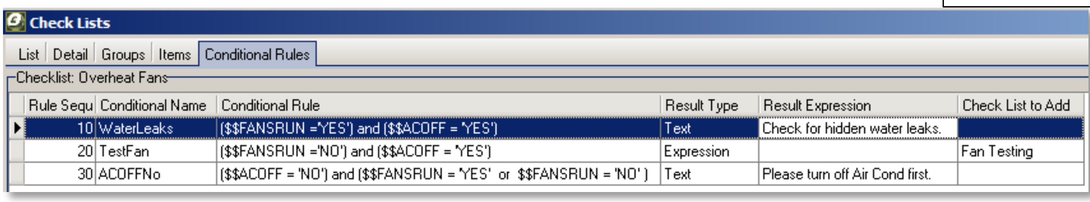
Groups Seq	Group Name	Mandatory Style
10	Fans	Optional





Group Name	Item Seq	Variable Name	Description	Type	List Values
Fans	10	ACOFF	Turn AirCond OFF	CheckBox	
Fans	20	FANSRUN	Does fan operate on its own	List	YES

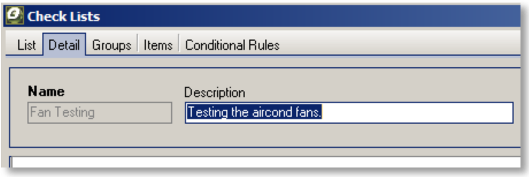
This CheckList could branch to another CheckList (Fan Testing) or solve the problem by checking for leaks.

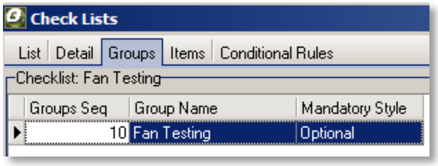


Rule Sequ	Conditional Name	Conditional Rule	Result Type	Result Expression	Check List to Add
10	WaterLeaks	($$FANSRUN ='YES') and ($$ACOFF = 'YES')	Text	Check for hidden water leaks.	
20	TestFan	($$FANSRUN ='NO') and ($$ACOFF = 'YES')	Expression		Fan Testing
30	ACOFFNo	($$ACOFF = 'NO') and ($$FANSRUN = 'YES' or $$FANSRUN = 'NO')	Text	Please turn off Air Cond first.	

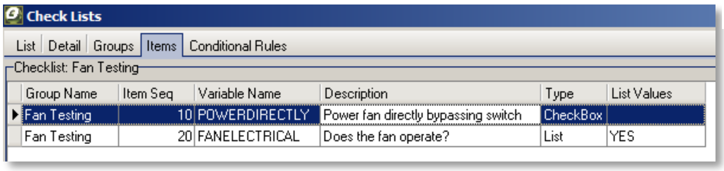
This last Rule is added just to prompt the user to turn off the AirCon and tick the CheckBox.

Final CheckList: Testing the AirCon fans – **Fan Testing**

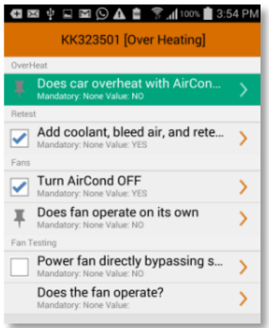




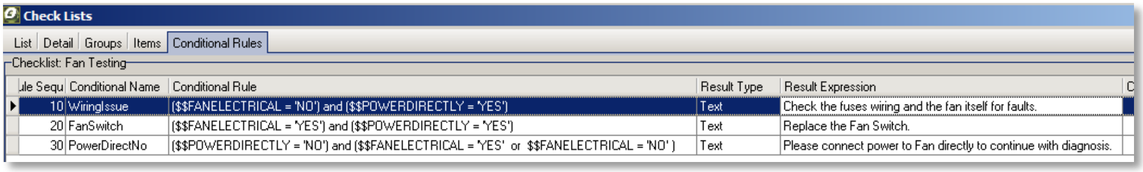
Groups Seq	Group Name	Mandatory Style
10	Fan Testing	Optional



Group Name	Item Seq	Variable Name	Description	Type	List Values
Fan Testing	10	POWERDIRECTLY	Power fan directly bypassing switch	CheckBox	
Fan Testing	20	FANELECTRICAL	Does the fan operate?	List	YES

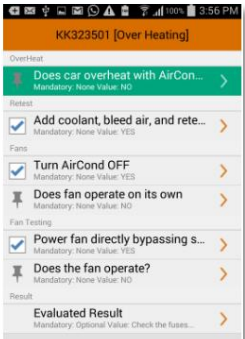


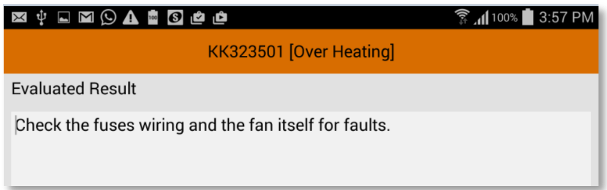
This final CheckList resolves the problem by either replacing the Fan Switch or fixing fuses, wiring, etc .



ule Sequ	Conditional Name	Conditional Rule	Result Type	Result Expression
10	WiringIssue	($$FANELECTRICAL = 'NO') and ($$POWERDIRECTLY = 'YES')	Text	Check the fuses wiring and the fan itself for faults.
20	FanSwitch	($$FANELECTRICAL = 'YES') and ($$POWERDIRECTLY = 'YES')	Text	Replace the Fan Switch.
30	PowerDirectNo	($$POWERDIRECTLY = 'NO') and ($$FANELECTRICAL = 'YES' or $$FANELECTRICAL = 'NO')	Text	Please connect power to Fan directly to continue with diagnosis.

This last Rule is added just to prompt the user to turn off the AirCon and tick the CheckBox.





Example 4: Heat Pump Selector

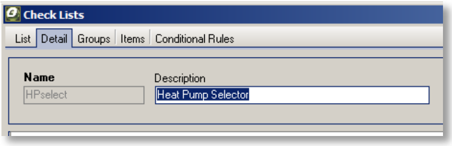
The Heat Pump Selector starts with calculating the requirements for one room. It then checks if there is another room to be added. If there are no more rooms, then it will calculate the total requirements of all the rooms and recommend the appropriate model.
In this example, we assume the following:

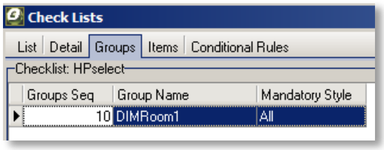
- You need 45 watts per cubic metre
- Windows NONE/STANDARD/LARGE will use the following factors respectively : -5% / 0% / +5%
- Insulation LOW/MEDIUM/HIGH will use the following factors respectively : +10% / 0 / -5%

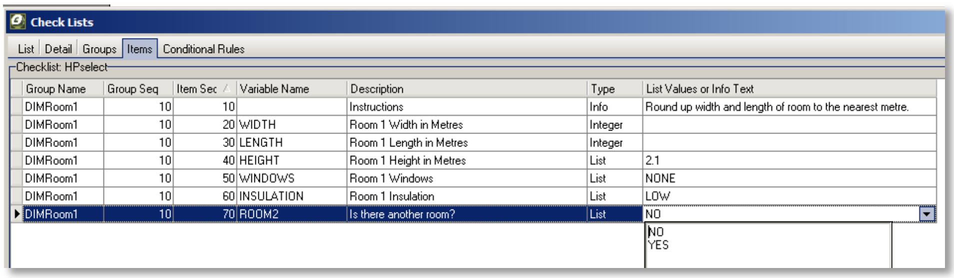
Ostendo Freeway HeatPump Selection Guide:

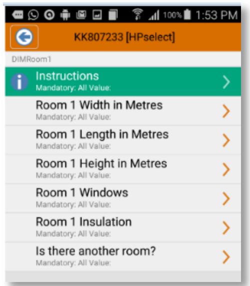
- Less than or equal to 2.5 Kilowatts → Model OF2500
- 2.5 – 5 Kilowatts → Model OF5000
- 5 – 7 Kilowatts → Model OF7000
- 7 – 9 Kilowatts → Model OF9000
- 9 – 12 Kilowatts → Model OF12000

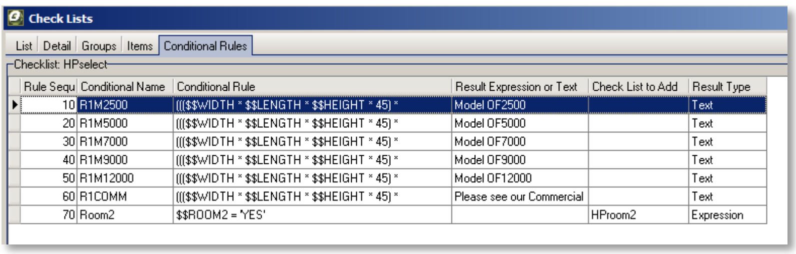
First CheckList: **HPSelect**









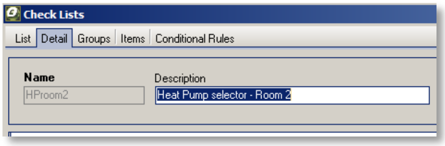


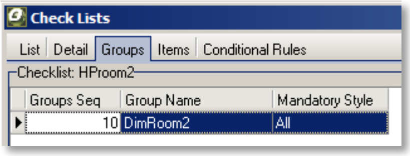
The Conditional Rule for selecting model OF2500 is as follows:

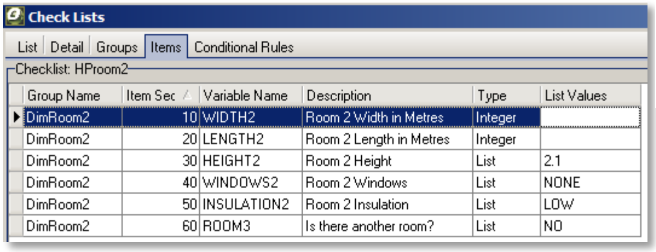
```
((($$WIDTH * $$LENGTH * $$HEIGHT * 45) * (case $$WINDOWS when 'NONE' then 0.95  when 'LARGE' then 1.05 else 1 end) *
(case $$INSULATION when 'LOW' then 1.1 when 'HIGH' then 0.95 else 1 end) ) <= 2500 )
and $$ROOM2 = 'NO'
```

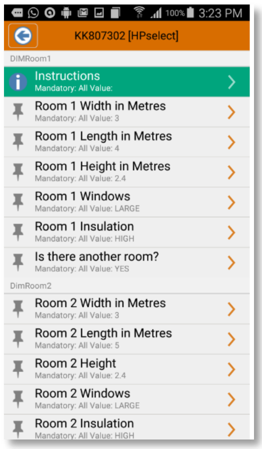
The rest of the model selection rules are similar.
The last rule checks if there is a second room. If so, it will pull in the checklist for Room 2.

Next CheckList: **HPRoom2**

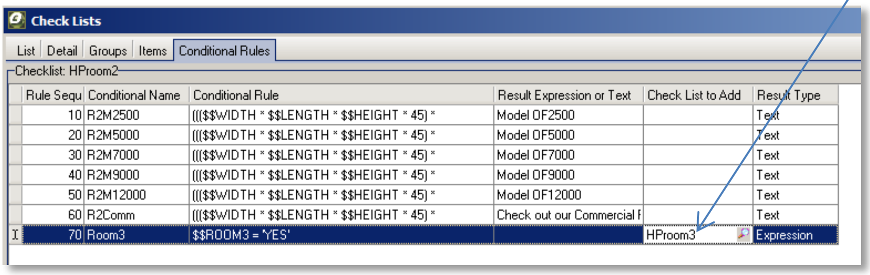








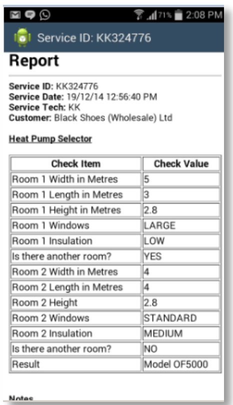
If there is potentially up to 3 rooms, then you need a third checklist (HProom3) else you would not need this last item.



You will need a separate checklist with unique variable names for each additional room.
If there are two rooms, then the model selection is done after the second checklist is processed. The Conditional rule for model selection in this checklist is like this:

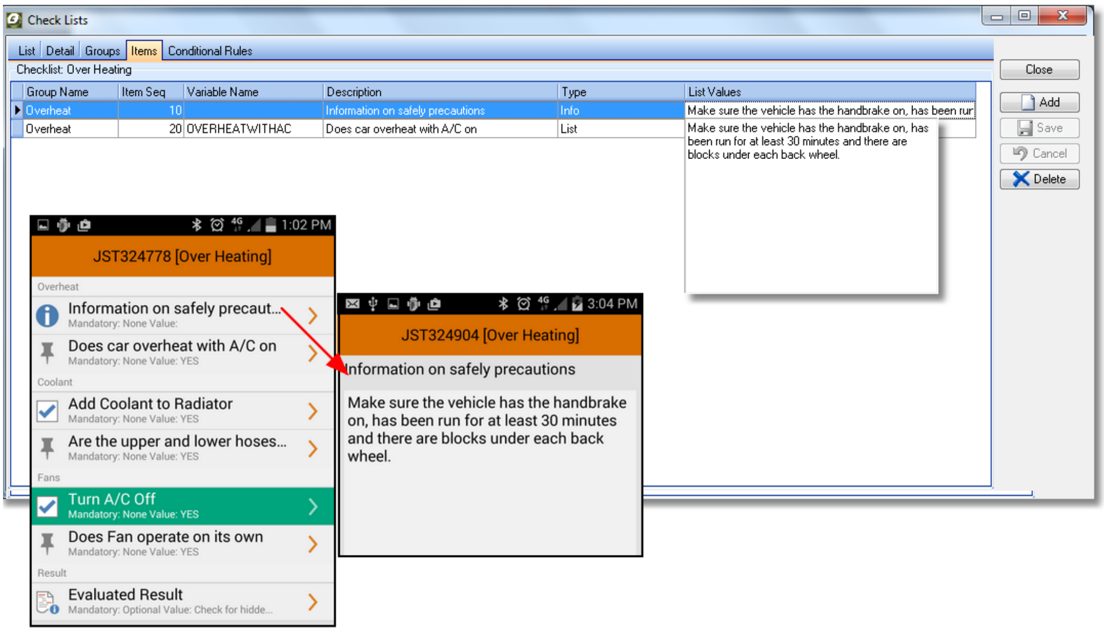
**((($$WIDTH * $$LENGTH * $$HEIGHT * 45) *
(case $$WINDOWS when 'NONE' then 0.95 when 'LARGE' then 1.05 else 1 end) *
(case $$INSULATION when 'LOW' then 1.1 when 'HIGH' then 0.95 else 1 end)) +
(($$WIDTH2 * $$LENGTH2 * $$HEIGHT2 * 45) *
(case $$WINDOWS2 when 'NONE' then 0.95 when 'LARGE' then 1.05 else 1 end) *
(case $$INSULATION2 when 'LOW' then 1.1 when 'HIGH' then 0.95 else 1 end))) <= 2500
and $$ROOM3 = 'NO'**

Notice that we are adding the requirements of both rooms. That is why we need unique variable names in all the checklists.

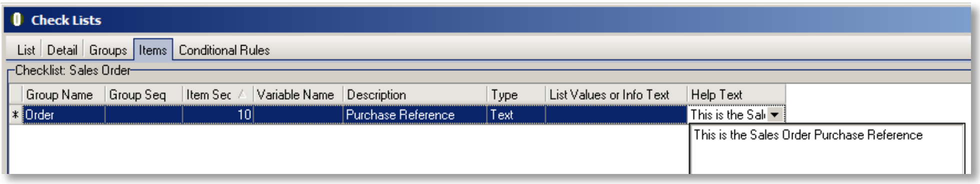


Additional Note on CheckLists:

1. Checklist Item Type "**Info**" allows you to provide hints or instructions in the checklist where required. See example below:



2. You can also enter "**Help Text**" for specific items in the CheckList. This will be displayed when the Info option is clicked.



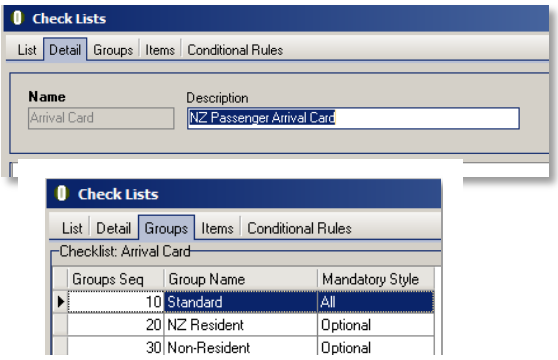
3. Checklist Item Type "**PhotoNote**" allows you to take a photograph and then add annotations to it.

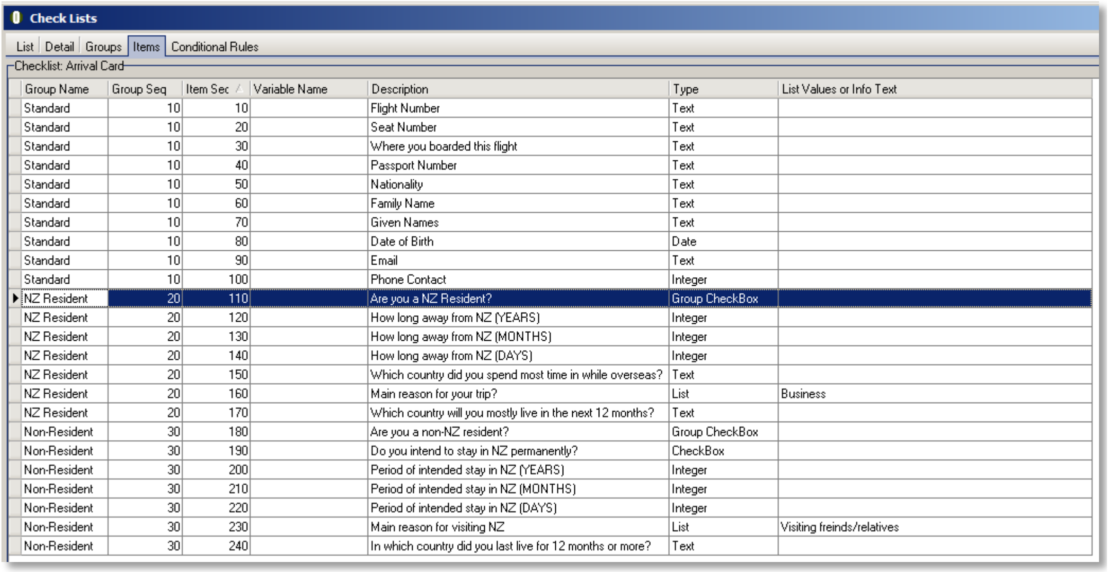
4. Checklist Item Type "**Group CheckBox**" provides the capability to add sub-checklists. When a Group CheckBox is ticked, it opens up a sub-checklist.

   Sub-checklists can have any item type except another Group CheckBox.
   Each Group CheckBox requires a unique Group Name. All items within a Group CheckBox will have the same Group Name.

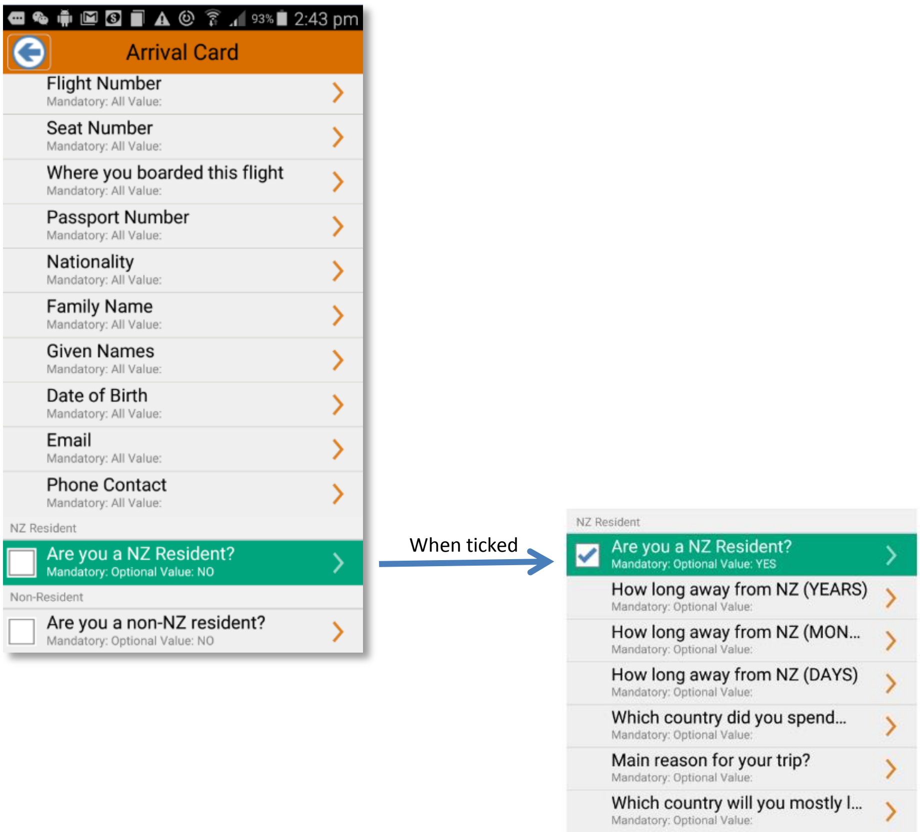
   You can have multiple Group CheckBoxes within the same checklist.

   Following is an example of the use of Group CheckBox:





Group Name	Group Seq	Item Sec	Variable Name	Description	Type	List Values or Info Text
Standard	10	10		Flight Number	Text	
Standard	10	20		Seat Number	Text	
Standard	10	30		Where you boarded this flight	Text	
Standard	10	40		Passport Number	Text	
Standard	10	50		Nationality	Text	
Standard	10	60		Family Name	Text	
Standard	10	70		Given Names	Text	
Standard	10	80		Date of Birth	Date	
Standard	10	90		Email	Text	
Standard	10	100		Phone Contact	Integer	
NZ Resident	20	110		Are you a NZ Resident?	Group CheckBox	
NZ Resident	20	120		How long away from NZ (YEARS)	Integer	
NZ Resident	20	130		How long away from NZ (MONTHS)	Integer	
NZ Resident	20	140		How long away from NZ (DAYS)	Integer	
NZ Resident	20	150		Which country did you spend most time in while overseas?	Text	
NZ Resident	20	160		Main reason for your trip?	List	Business
NZ Resident	20	170		Which country will you mostly live in the next 12 months?	Text	
Non-Resident	30	180		Are you a non-NZ resident?	Group CheckBox	
Non-Resident	30	190		Do you intend to stay in NZ permanently?	CheckBox	
Non-Resident	30	200		Period of intended stay in NZ (YEARS)	Integer	
Non-Resident	30	210		Period of intended stay in NZ (MONTHS)	Integer	
Non-Resident	30	220		Period of intended stay in NZ (DAYS)	Integer	
Non-Resident	30	230		Main reason for visiting NZ	List	Visiting freinds/relatives
Non-Resident	30	240		In which country did you last live for 12 months or more?	Text	



5. Checklist Item Type "**Stopwatch**" adds a stopwatch function to the checklist to capture time/duration values.

6. Checklist Item Type "**GPS**" allows the user to record his/her GPS coordinates as part of the checklist process.

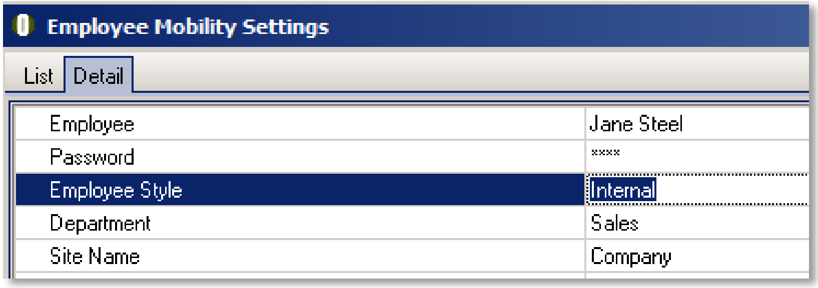
Please refer to the **OSTENDO REFERENCE HELP** for a complete list of CheckList items.

APPENDIX 1 : Ostendo Freeway Updates History

7 August 2017 - What's New : (Android Play Store Version 522)

1. Employee Mobility Settings – **Employee Style**.

   This is a display-only field with three possible values ("**Internal**", "**Mobility B2B", Mobility Subcontractor**).



   Mobility Subcontractor employees are employees who are linked to Suppliers.
   Mobility B2B employees are employees linked to Customers.

2. Employee Mobility Settings – Detail tab – **Level of Information Displayed**

   - **Standard**
   - **Minimum**

   This setting applies to Job / Assemblies / Customer / Supplier / Delivery information displayed in the Info section of a datasheet. The default is "Standard".

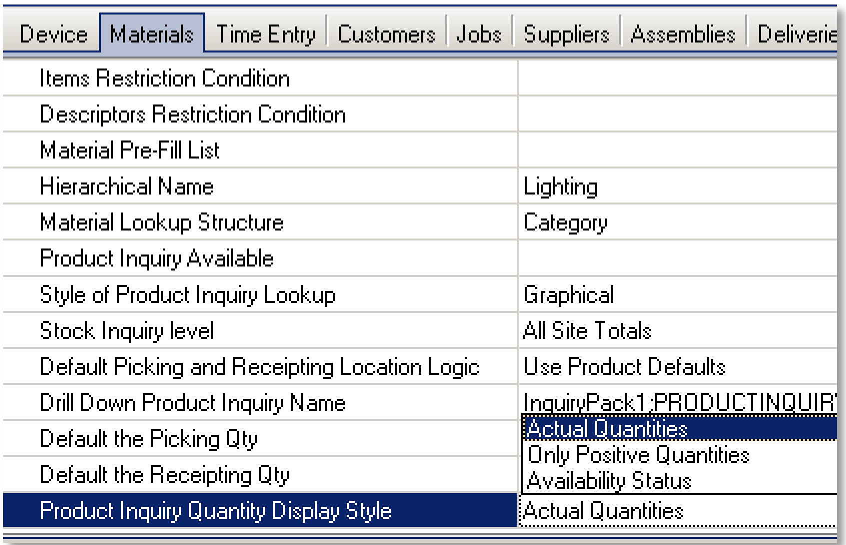
   With the introduction of Customer and Sub-Contractor usage of Freeway, it may be necessary to limit the amount of information that will be exposed to these third parties.

   Use "Minimum" if you wish to limit such information to a bare minimum (basic contact information) to the "employee" concerned. Additional fields can be added to this "bare minimum" option through the use of Mobility Settings like "Job Info fields, Customer Info Fields, etc.

3. Employee Mobility Settings – Materials tab - **Product Inquiry Quantity Display Style**

For material quantities you can now choose to display one of the following:

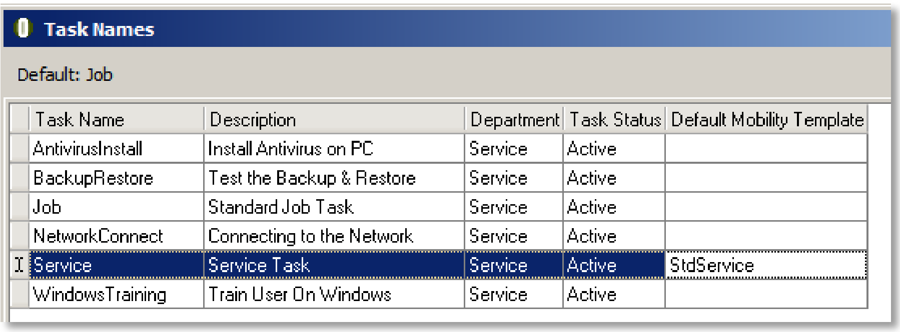
Actual Quantities :	Both positive and negative quantities displayed.
Only Positive Quantities :	Negative quantities will be displayed as zero (0).
Availability Status :	Quantities not displayed. Just "**In Stock**" or "**Out of Stock**".



This is to cater for situations where you do not wish to show the actual stock quantities to the Freeway Mobility user.

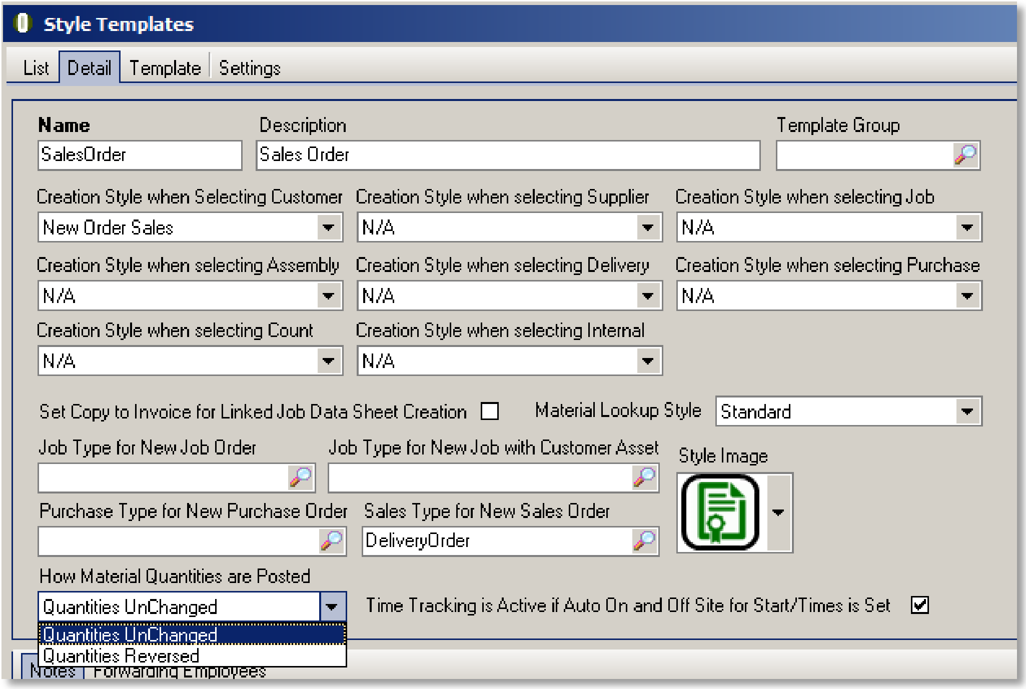
4. Task Names – **Default Mobility Template**

You can now assign a Style Template to a Task Name so that whenever this job task is selected in Freeway, it will automatically use this Style Template. In other words the user cannot use any other template when working on such tasks.



5. Style Templates : **How Material Quantities are Posted**

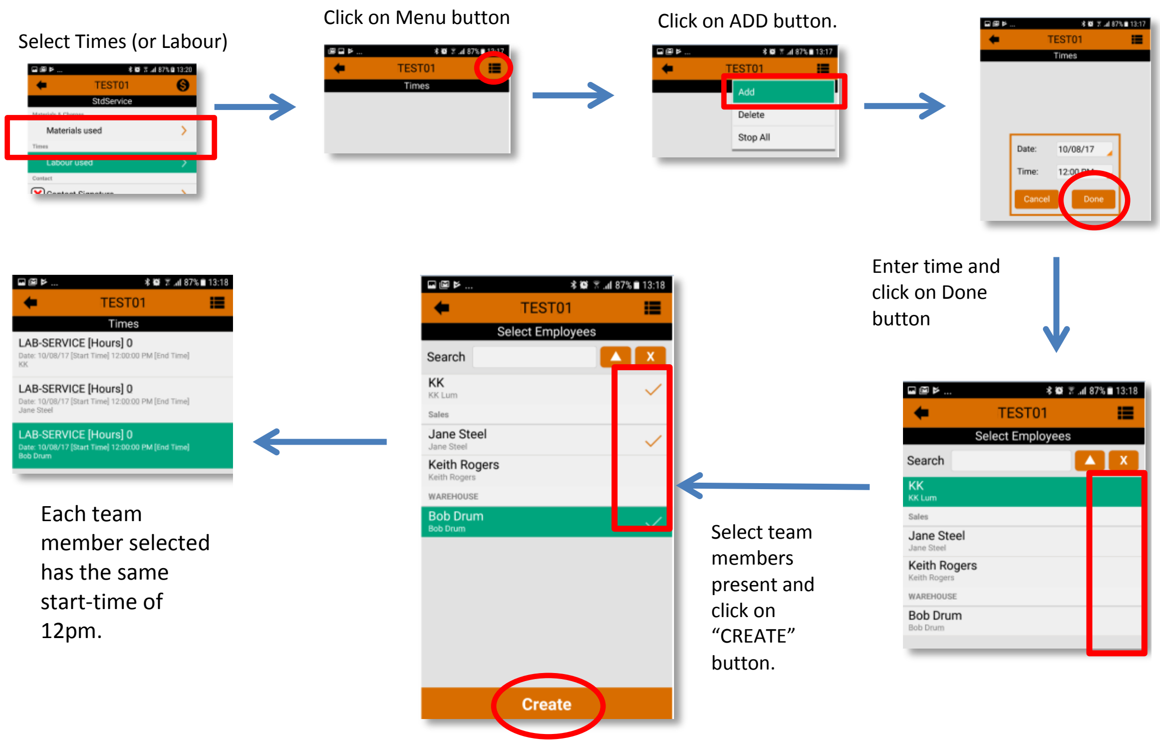
- Options are : "**Quantities UnChanged**" or "**Quantities Reversed**".



The "**Quantities Reversed**" setting provides an option to create a template that can handle product returns where the quantities entered will be reversed when posting back into Ostendo.

6. Time Entry for Mobility Teams

You can enter times for one or more Mobility Team members at the same time. You do this by selecting the members from a dropdown list of all the members in the Mobility Team.



7. **Time Tracking** :

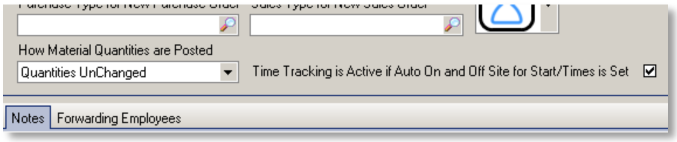
You can now specify that GPS tracking coordinates is only sent back to Ostendo when Start/Stop times is entered (not when datasheet is created). This gives the user the flexibility to select the jobs and create the datasheets first before arriving on site and actually starting the job. This also ensures the GPS tracking data actually reflects the start/stop times of the employee (or employees in a Mobility team).

Two settings are required to set this up:

a. Employee Mobility Settings – Device Tab : **Auto Set On and Off Site for Start/Stop Times**

This flag must be ticked to automatically send OnSite and OffSite tracking data when Start Time or Stop Time is entered in the datasheet. (This flag is mutually exclusive to the previous setting "Auto Set On and Off Site for Sheet Creation and Completion when Tracking".)

b. Style Template Detail tab: **Time Tracking is Active if Auto On and Off Site for Start/Times is Set**



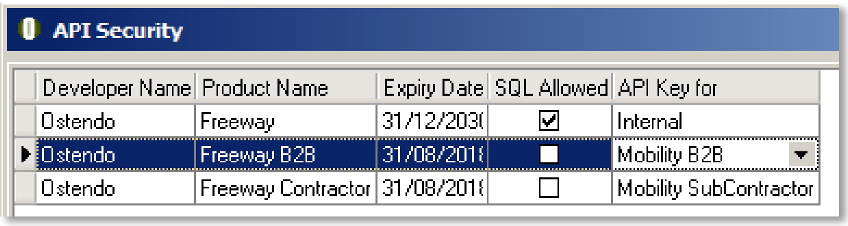
This flag needs to be turned on if you wish the mobile device to send back GPS tracking coordinates only when Times data is captured on the datasheet template.

8. Customer Mobility

You can now extend the use of the Freeway app to customers. You can create style templates which can be used by customers to lodge a support ticket, inquire into their jobs, etc…

Before you set up the Customer Mobility screen, you need two things:

a. You need to set up an **API Security record** for Mobility B2B.

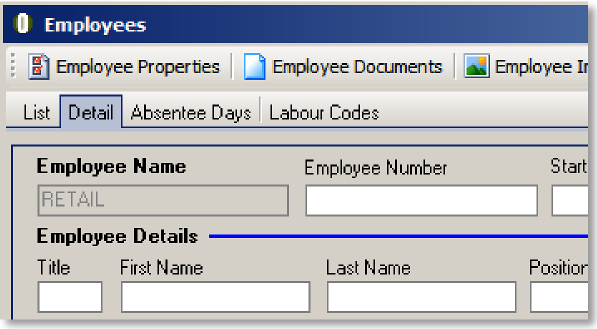


API Security

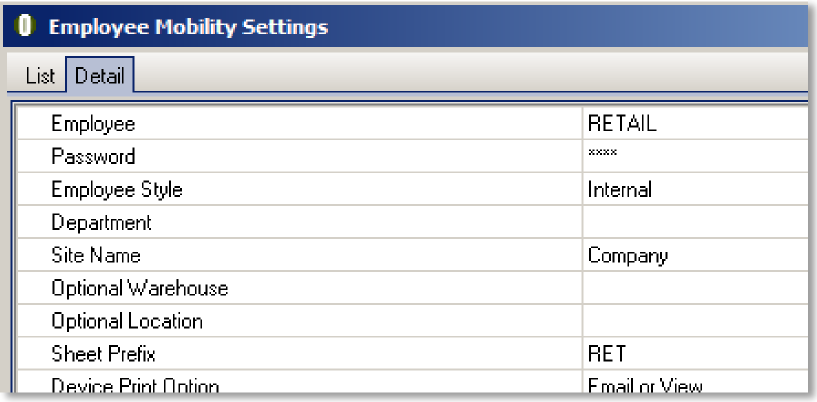
Developer Name	Product Name	Expiry Date	SQL Allowed	API Key for
Ostendo	Freeway	31/12/203(	☑	Internal
Ostendo	Freeway B2B	31/08/201(	☐	Mobility B2B
Ostendo	Freeway Contractor	31/08/201(	☐	Mobility SubContractor

Multiple customers can use the same API Security record or they can each have their own unique API record.
(Note, the combination of Developer Name and Product name should be unique for all API Security records).

b. Set up an **Employee Name** in the Employee screen which you will use as a Mobility Settings employee for B2B customers.



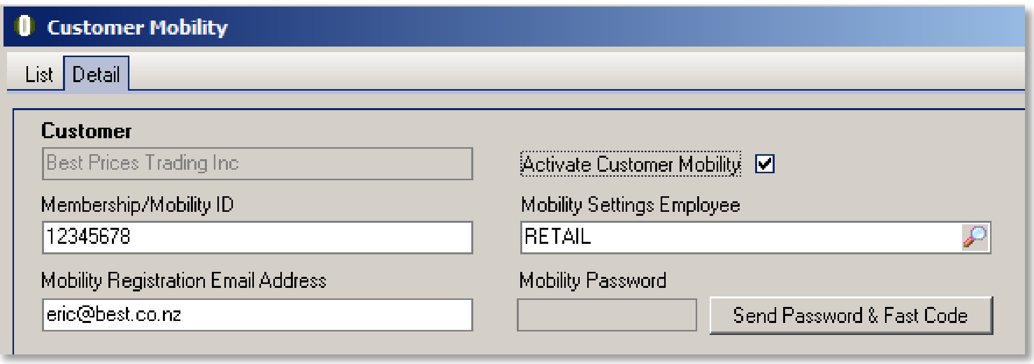
And the **Employee Mobility Settings record**:



When you first set up the Employee Mobility Settings, the Employee Style will default to "Internal" until this "employee" is associated to a B2B Customer (Mobility B2B).

c. Customer Mobility Screen

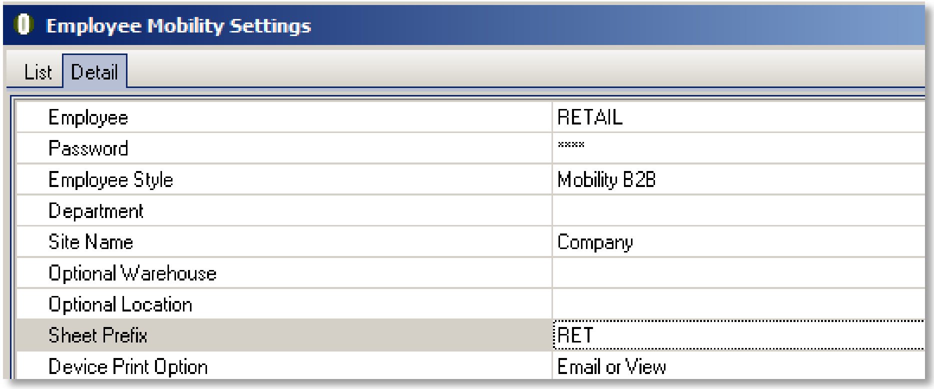
To set up Customer Mobility, a new **Customer Mobility Screen** is provided in Ostendo which is accessible via the Related Menu in the Customer screen.



This screen allows you to enter the following:

- **Membership / Mobility ID** : The customer's unique Membership number serves as his Mobility ID in Freeway.
- **Activate Customer Mobility** : This tick-box allows you to activate or de-activate the access given to the customer.
- **Mobility Settings Employee** : The Employee Mobility Settings to be used by this customer.

Once you associate the Mobility Settings Employee to the Customer, the Employee Style of the associated Employee will change to “Mobility B2B” in the Employee Mobility Settings screen.

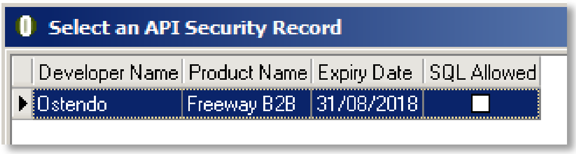


- **Mobility Registration Email Address** : The email address of the customer person designated to handle this B-to-B relationship.
- **Mobility Password** : Display-only field. Password is generated by pressing the **Send Password & Fast Code** button.

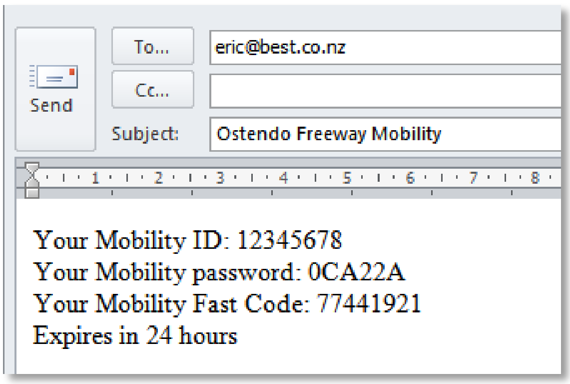
Send Password & Fast Code Button : When pressed, three options are presented –

a. **Password & Fast Code**:
b. Password:
c. Fast Code:

When generating the Fast Code, a list of Mobility B2B API Security records (if more than one) available will be presented. Select one to generate the Fast Code.



An email will be generated to send the password and/or Fast Code to the customer.



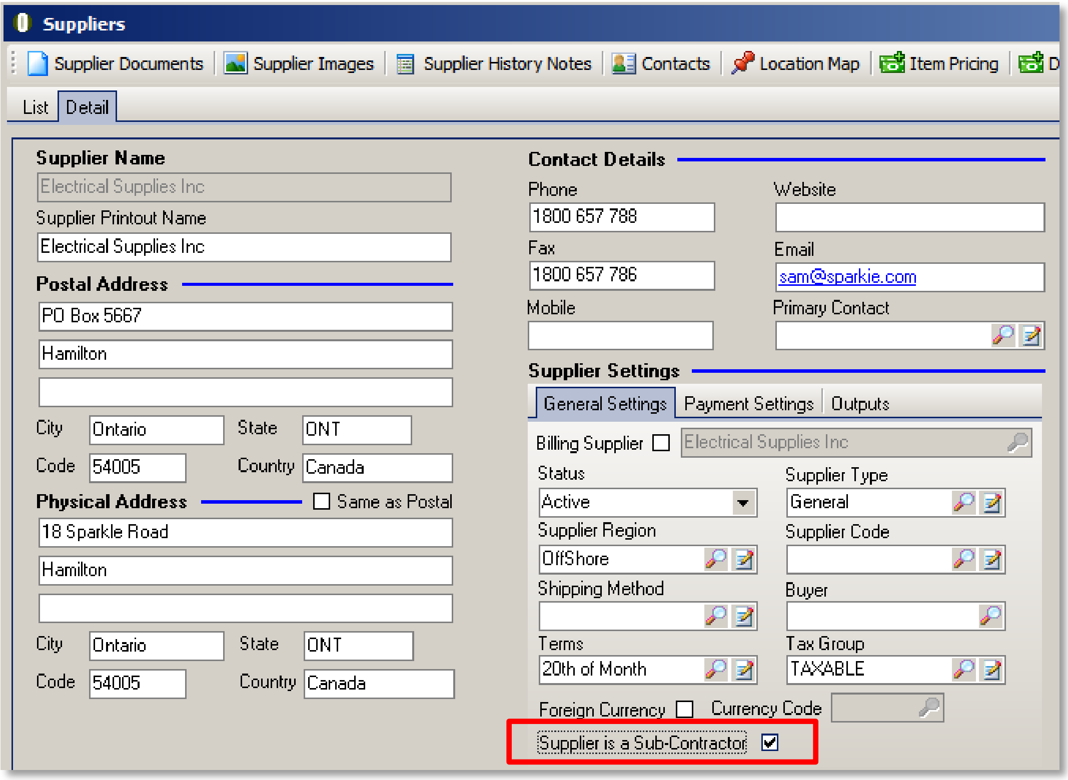
The Mobility ID, password, and Fast Code is given to the Customer when he first set up his Freeway App to link to your Ostendo database. Once he has established the link, he can then change the password (using Freeway) if he wishes to do so.

The Fast Code is used when first establishing the connection to the Ostendo database. It loads the actual API Key and Mobility License key onto the mobility device to establish the link.

Customers enter Mobility ID (instead of Employee name) and password when synchronizing their mobile device with Ostendo.

9. **Suppliers** – Detail – General Settings tab **– Supplier is a Sub-Contractor**

This setting, when ticked, indicates the supplier is also a sub-contractor.

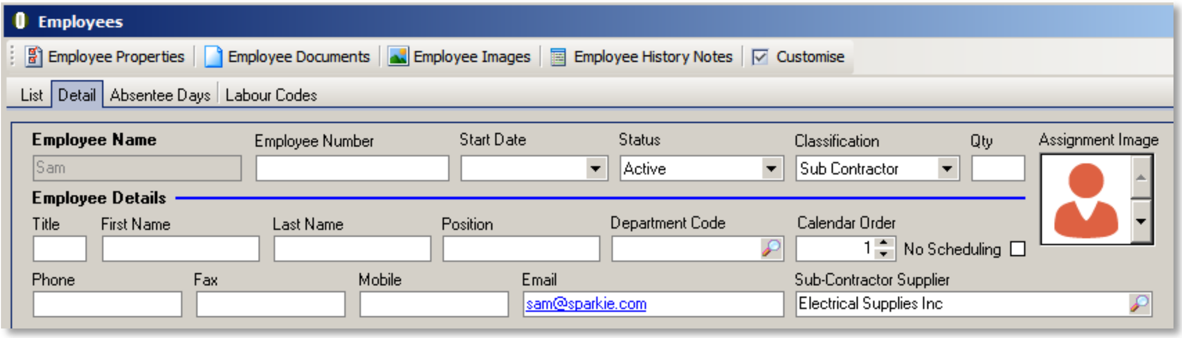


Ostendo users can set up Freeway for their Sub-Contractors to use in the performance of jobs assigned to them. Ostendo users benefit by having all job data recorded and sent back immediately upon job completion so that customer billing can be initiated faster. Sub-Contractor benefits in terms of reduced paperwork and being paid in a timely manner.

10. Setting up Subcontractors to use Freeway Mobility

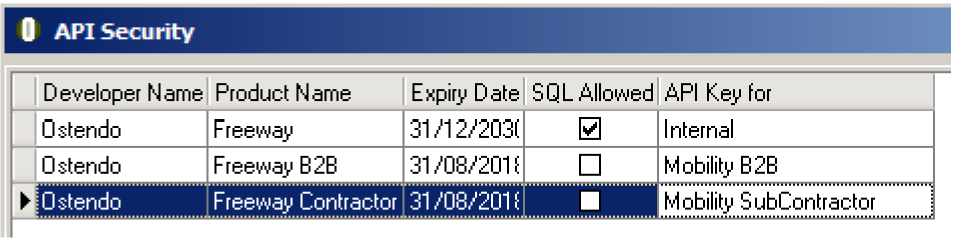
The following steps are required:

a. Set up **Subcontractor employees** in the Employee Screen:



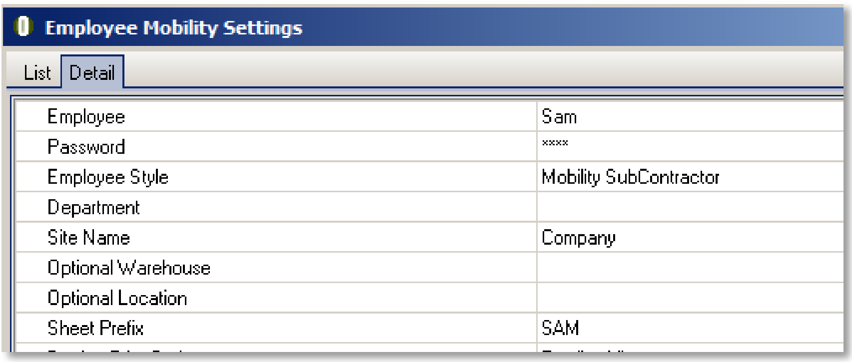
An employee is a subcontractor employee when the Sub-Contractor Supplier field is filled in.

b. Set up an **API Security record for Mobility SubContractors**:



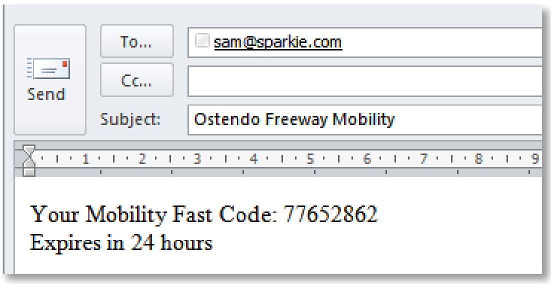
API Style is **Mobility SubContractor**.
(Note: the combination of Developer name and Product name must be unique for each API Security record.)

c. Set up the **Employee Mobility Settings record** for the Subcontractor employees:



d. Generate the **FastCode** for the Subcontractor employee

Click on the FastCode button to generate the Fast Code for the Subcontractor employee. If you have multiple API Security records for Mobility SubContractor, then select one to generate the Fast Code.

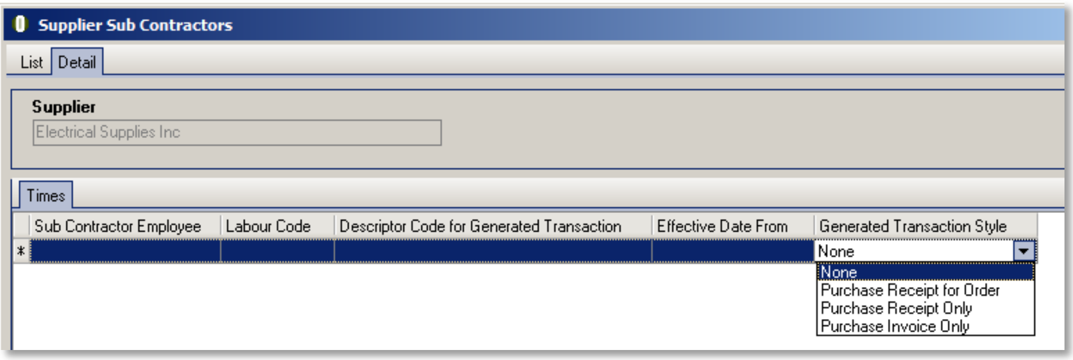


An email will be created to send the Fast Code to the subcontractor employee.

The Subcontractor employee then uses the Fast Code to load the API key and Mobility License key onto his Freeway App.

e. **Supplier Sub-Contractors screen**

This is a new screen in Ostendo Purchasing menu. The Times tab allows you to translate times entered by sub-contractor employees into Purchase Receipt or Purchase Invoice lines.

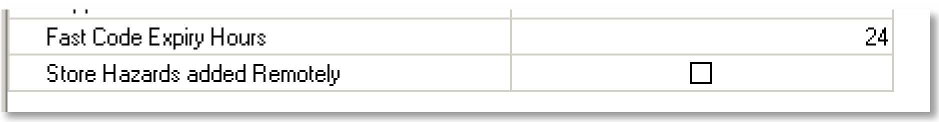


The set of rules (a matrix of factors) determine what transactions could be generated based on a combination of sub-contractor employee, Labour Code, Descriptor Code, and Effective Date.

When the sub-contractor employee enter times into the Freeway datasheet, they select the appropriate Labour Codes (just like an employee). However in order to create Purchase Receipts/Purchase Invoices to pay the Supplier, these Labour Codes in the times data need to be translated into equivalent Descriptor Codes. This is achieved using entries in this Supplier Sub-Contractors Times tab.

11. Mobility Rules – Fast Code Expiry Hours

Specify the number of hours (from 1 to 72) desired. Fast Codes generated will need to be used within this timeframe, else it expires.



12. Mobility Rules – Store Hazards added Remotely

Ticking this box will allow Customer Hazards to be updated automatically when new hazards are identified and recorded when the Freeway app syncs with Ostendo.

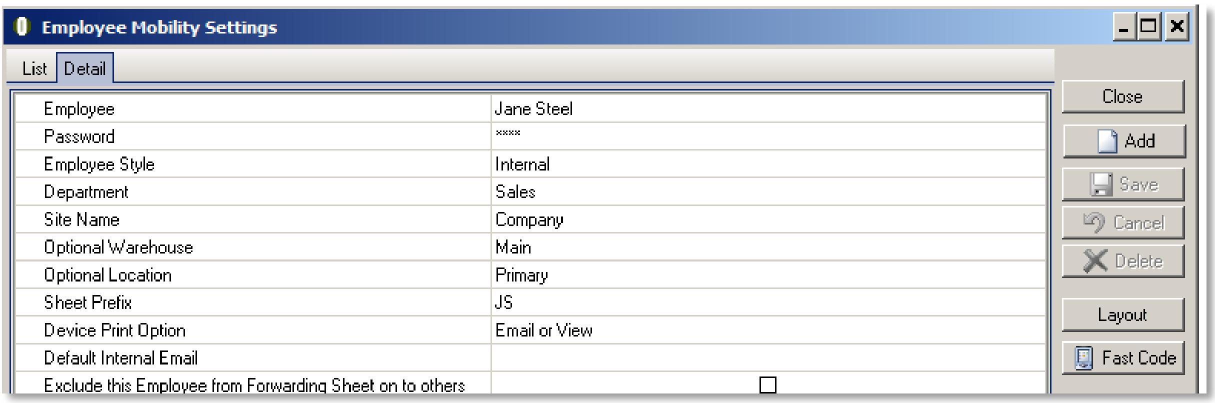
13. Inquiry Packs – Statistic Groups

Grouping of statistics allow you to present the data in logical groupings as desired.

Statistic Group names can be defined in Mobility Settings. These group names are used in the Inquiry Packs Contents – Scorecard (Statistic) tab to organize the data into the preferred sets. The statistics will be ordered by Group Name, Sequence Number, and Statistics Name.

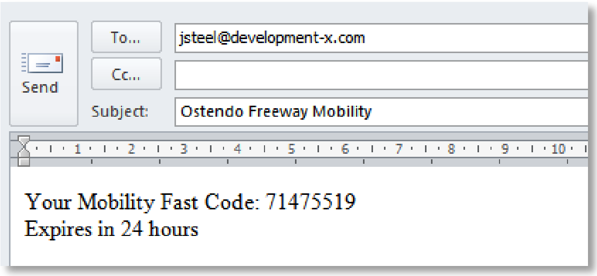
14. Freeway Security – FastCodes

You can now generate FastCodes from either the Employee Mobility Settings screen or the Customer Mobility screen.



In the Employee Mobility Settings screen, you select the employee, and click on the FastCode button. If you have multiple “Internal” API Security records, then select one from the dropdown list.

It will then generate the Fast Code and create an email to send the Fast Code to the employee. (The employee must have an email address defined in the Employees screen.)



In the Customer Mobility screen, click on the "Send Password and Fast Code" button and select either the "Password & Fast Code" or the "Fast Code" option.
If you have multiple "Mobility B2B" API Security records, then select one from the dropdown list.
It will then generate the Fast Code and create an email to send the Fast Code (together with the Mobility ID and password) to the customer.

A new Mobility Rule allows you to set an expiry time limit (from 1 to 72 hours) for FastCodes generated. The default is 48 hours. FastCodes not utilized will expire automatically within the set time limit.

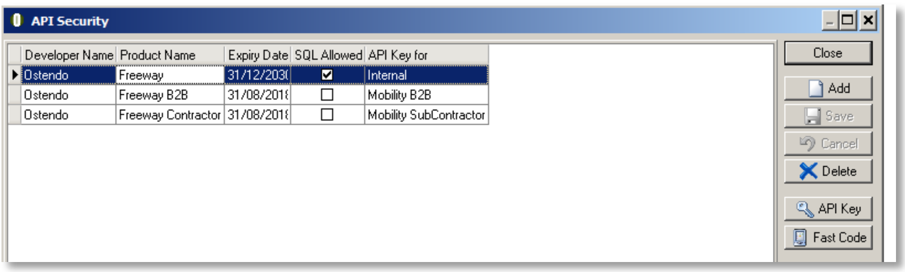
15. API Security records for Customers and Subcontractors

As an added security feature, it is mandatory to have separate API Security records for employees, for customers, and for subcontractors. This is to prevent customers and subcontractors from "accidentally" accessing Freeway/Ostendo as an employee.

API Security records will have a Style field which will indicate if the record is for employees (**Internal)**, or for customers (**Mobility-B2B)**, or for subcontractors (**Mobility-Subcontractor)**.

Just like multiple employees can share the same Internal API Security record, multiple customers can share the same Mobility-B2B API Security record, and multiple subcontractors can share the same Mobility-Subcontractor API security record.

However if you wish to, you can also have an API Security record for each customer. This applies to subcontractors as well.



18 July 2017 – What's New: (Android Play Store Version 509 and **Apple App Store Version 512)**

1. **Apple IOS and Google Android versions of Freeway are online**

   We are very happy to announce that both the Apple and Android versions of Ostendo Freeway are now online under each of their respective stores:

   Apple IOS Link (App Store): https://itunes.apple.com/us/app/ostendo-freeway/id1114700678?mt=8

   Android Link (Play Store): https://play.google.com/store/apps/details?id=com.development_x.freeway

   From now on, the latest version of the respective apps must be downloaded from these Stores.

2. **Mobility Rules:**

Expiry Days Remaining for Picking	
Job Note Source	Job Instructions
No of Remaining Count Lines to Display	10
No of Counted Count Lines to Display	10
Display Counted Lines Style	All Counted Lines
Customer Note Source	General Notes
Supplier Note Source	General Notes

- We have added the ability to restrict the number of remaining count lines and counted count lines to display for Freeway Warehousing – Inventory Counts.

- We have added the ability to define whether the Mobility employee can see all counted lines for that specific Inventory Count, or only the lines counted by that employee.
  (**All Counted Lines** or **Only Employee Counted**)

- **Job Note Source**: We have added this new rule to allow Notes available in the Mobile Data sheet info tab to be sourced from either the standard **'Job Instructions'** (as entered in the Job Header) or '**Work Instructions'** (this a new field in the Job Header called 'Work Instructions').

- **Customer Note Source**: We have added this new rule to allow Notes available in the Mobile Data sheet info tab to be sourced from either the standard **'General Notes'** (as entered in against the Customer) or **'Mobility Notes'** (this is a new notes field in the Customer screen).

- **Supplier Note Source**: We have added this new rule to allow Notes available in the Mobile Data sheet info tab to be sourced from either the standard **'General Notes'** (as entered in against the Supplier) or **'Mobility Notes'** (this is a new notes field in the Supplier screen).

These additional Notes sources give you the option to separate out internal notes (for office use only) from field notes (sent to mobile devices).

Version 499 – What's new:

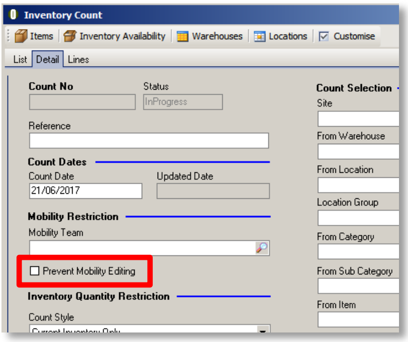
1. **Backward and Forward compatibility:**

   From this update on, the Freeway App is both backward (and forward) compatible with future versions of Ostendo, and any standalone solutions created. The advantages of this are:

   - Freeway will be able to connect to multiple versions of Ostendo at the same time. In other words, each solution can independently connect to different databases even when the databases have different structures (i.e. Update 227 and then say Update 230) – ideal for consultants that might need to connect to multiple client sites from the one app.
   - Standalone solutions that have been developed don't need to be in-sync with the Freeway app, or with any Ostendo Database that Freeway is connected too.

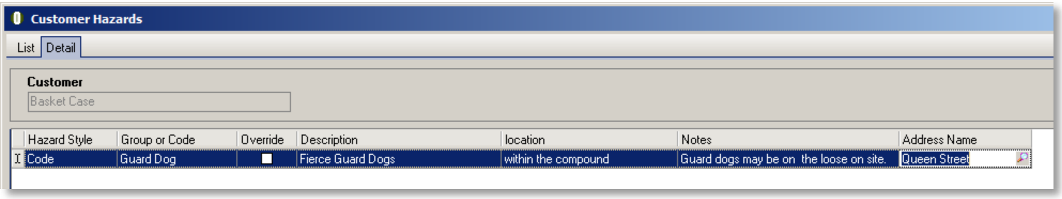
2. **Inventory Counts – Prevent Mobility Editing:**

   We have added a checkbox to Prevent Mobility Editing. This is used where the count has been physically completed and the office is now vetting/checking the results before updating the count. If ticked, no changes can be made to the count via Freeway.



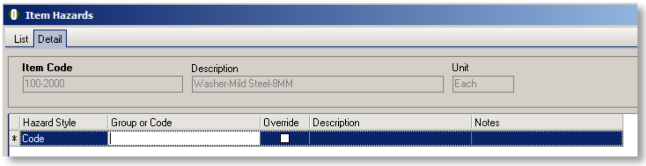
3. **Customer Hazards – Linking to Specific Address:**

   The ability to link a Customer Hazard directly to an '**Address Name**' has been added. This applies when a Job is selected in Freeway (the Style Template requires that the Type called 'HAZARDS' has been included in the Template); the hazards linked to the Customer as a whole (with no Address Name), and any hazards linked to the specific address for the Job are then included in the Data Sheet.



4. Item Hazards – MSDS (Material Safety Data Sheets):

We have added the ability to link **Hazard Codes or Groups** directly to an Item Code. This can be used in Freeway to include any safety instructions/hazards that relate to that product when used in either Jobs or Assemblies. Again like the Customer Hazards, you will need to include the 'HAZARDS' type in the Style Template.

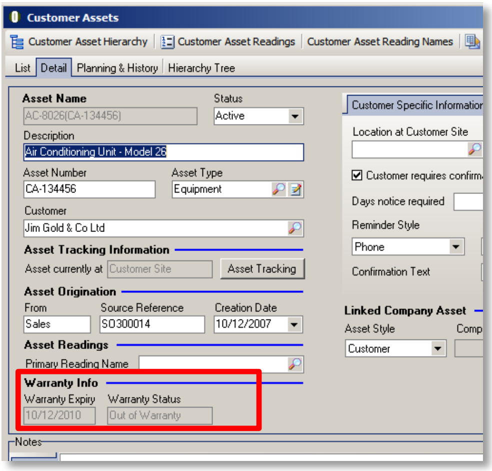


5. Job Types – Hazard Groups:

We have added the ability to link a **Hazard Group to the Job Type definition**. This enables a list of hazards to automatically inserted into the Job Hazards screen on generation of a new Job. Useful if the hazards/instructions that are introduced/needed can be attributed the type of work that is being carried out. Again like the Customer Hazards & Item Hazards, you will need to include the 'HAZARDS' type in the Style Template definition.

6. Customer Assets – Warranty Information:

We have added '**Warranty Information**' fields to the Customer Asset screen. These are display only fields indicating whether the asset is currently covered by a valid warranty, the warranty has expired, or warranties don't apply. The information is a summary view of any linked warranties to the asset, dynamically determining the status based on the current date and the warranty with the greatest expiry date (where there is more than one warranty for the asset).
These fields can be selected to be displayed in Freeway using "Asset Info Fields" in Mobility Settings and Asset type in the Style Template.



Version 497 – What's new:

1. **New Functions:**

   This version adds the following functions to Freeway:
   - **Assembly Picking** (from inventory)
   - **Assembly Receipting** (to inventory)
   - **Job Picking** (from inventory)
   - **Purchase Order Receipting** (to inventory)
   - **Inventory Counts**

   All these functions would require Freeway to have online access to the Ostendo database.

To create Data Sheet templates for these functions, these are the **new** associated settings and template types you need to use:

a. Assembly Picking :
- Employee Mobility Settings
  - Assemblies Tab – **Assembly Picking Tolerance %**
    - If users are allowed to ***pick more than the required amount***, this sets the % tolerance allowed.

- Style Template – Creation Style when selecting Assembly – **Update Order**

- Template Type – **ASSYPICKING**
    - This Template Type will dynamically list the Assembly Step items that can be picked from inventory.

b. Assembly Receipting :
- Style Template – Creation Style when selecting Assembly – **Update Order**

- Template Type – **ASSYRECEIPTING**
    - This Template Type will dynamically list the Assembly Step items that can be receipted into inventory.

c. Job Picking :
- Style Template – Creation Style when selecting Job – **Update Order**

- Template Type – **JOBPICKING**
    - This Template Type will dynamically list the Job Task items that can be picked from inventory.

d. Purchase Order Receipting :
- Employee Mobility Settings
  - Detail Tab – **Purchase Selection Available**
    - Ticking this box allows the employee to work with Purchase Receipting.

  - Materials Tab – **Default the Receipting Qty**
    - Ticking this could make it more efficient for the employee to do receipting as the Receipt Qty is automatically filled in. The user can overwrite if required.

  - **Purchases Tab**
    - **Purchase Restriction Condition**

            - This allows you to specify conditions that will restrict the employee to work with certain Purchase Orders only.
        - **Auto Sync the Purchase List when Selected**
            - This will automatically refresh the list of Purchase Orders each time the Purchase lookup is selected.
        - **Purchase Horizon Days**
            - This will display Purchase Orders whose required date falls within the horizon. For example, if Purchase Horizon is set at 2 days, then the Mobility user will only see Purchase Orders which are required in the next two days. This is to avoid displaying unnecessarily large number of Purchase Orders for selection.

- Style Template – Creation Style when selecting Purchase – **Update Receipt**

- Template Type – **PURCHASERECEIPTING**
        - This template type will automatically list the Purchase Order items that are yet to be receipted.

e. Inventory Counts :

- Employee Mobility Settings
    - Detail Tab – **Inventory Count Selection Available**
        - Ticking this box allows the employee to work with Inventory Counts.

    - **Counts Tab**
        - **Inventory Count Restriction Condition**
            - This allows you to specify conditions that will restrict the employee to work with certain Inventory Counts only.

        - **Auto Sync the Inventory Count List when Selected**
            - This will automatically refresh the list of Inventory Count items each time the Inventory Count Lookup is selected.

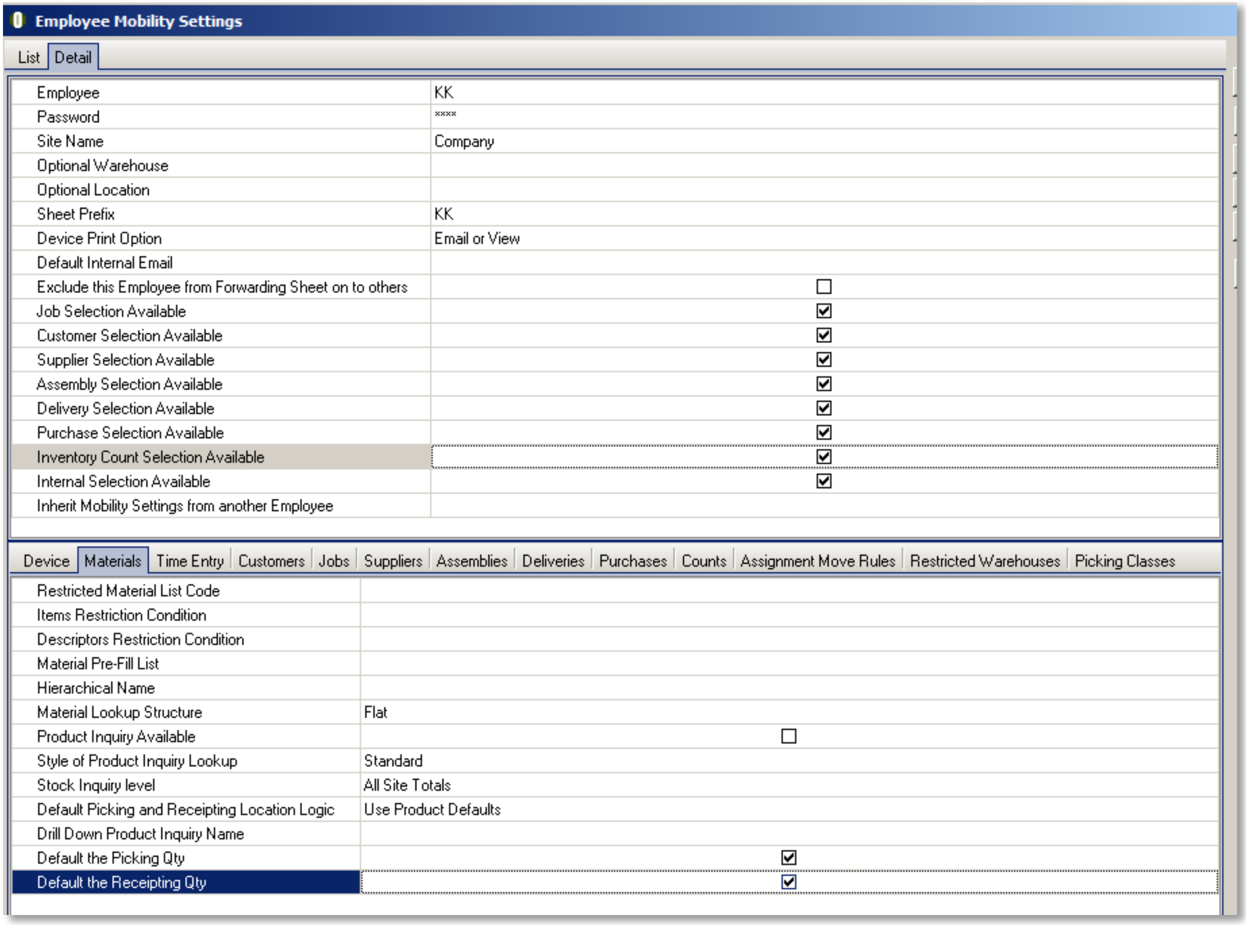
        - **Display Stock On Hand for Count Lines**
            - This will display the expected on hand quantity in the Count lines.

- Style Templates - **Creation Style when selecting Counts - Update Count**

- Template Type – **COUNTLINES**

        - This template type will list the Inventory Count items that are yet to be counted.

2. Employee Mobility Settings:



The following have been added to Employee Mobility Settings:

i. **Purchase Selection Available** – ticking this will allow the employee to do Purchase Receipting.

ii. **Inventory Count Selection Available** – ticking this will allow the employee to do Stock Counts.

iii. **Materials tab:**

a. **Default the Picking Qty** – ticking this will save the user from having to enter pick quantity for every item picked.

b. **Default the Receipting Qty** - ticking this will save the user from having to enter receipt quantity for every item receipted.

iv. **Assemblies tab:**

a. **Assembly Picking Tolerance %** - You can specify the percentage the user is allowed to pick above the required amount.

v. **Purchase tab (new):**

a. **Purchase Restriction Condition** – this restricts the employee to working only with Purchase Orders that meet the condition specified.

b. **Auto Sync the Purchase List when selected** – This will refresh the Purchase Orders List each time Purchase lookup is selected.

c. **Purchase Horizon Days** – This will display Purchase Orders whose date falls within this horizon. This is to avoid displaying unnecessarily large number of Purchase orders for selection.

vi. **Counts tab (new):**

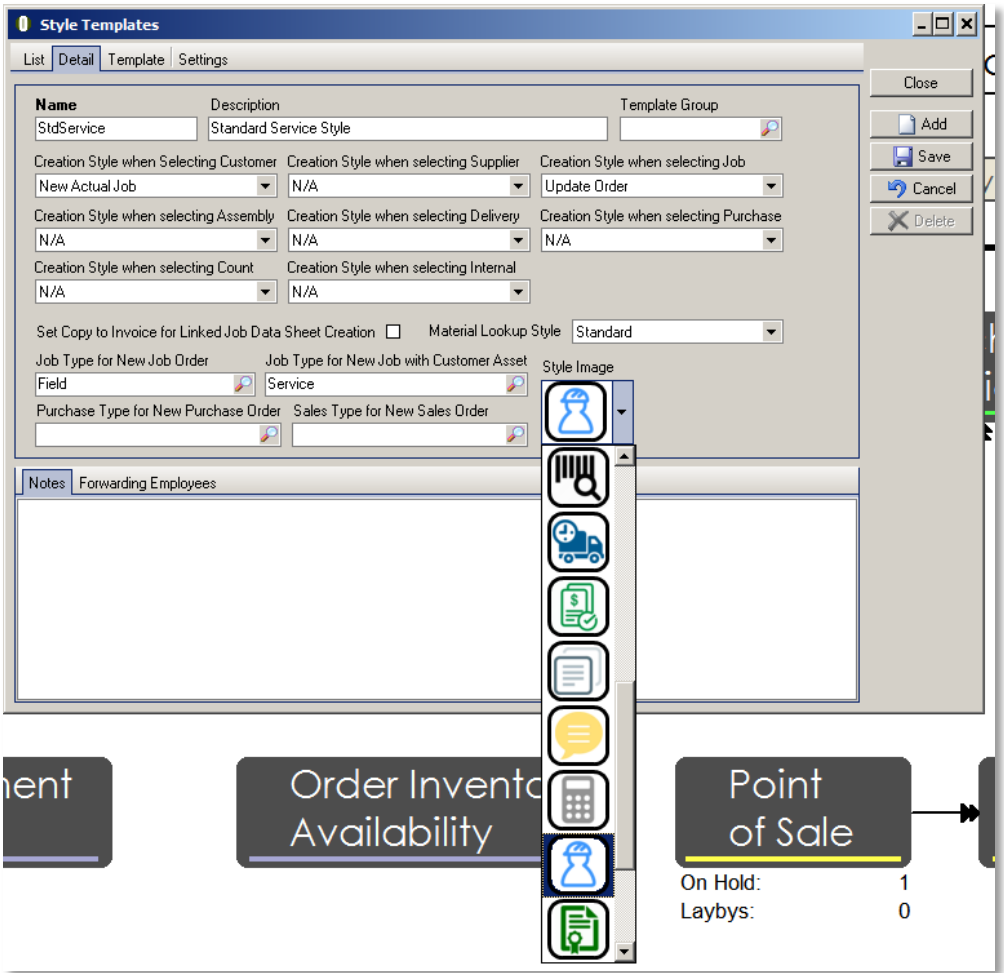
a. **Inventory Count Restriction Condition -** this restricts the employee to working only with Inventory Counts that meet the condition specified.

b. **Auto Sync the Inventory Count List when selected** – this will refresh the Inventory Counts List each time the Inventory Count lookup is selected.

c. **Display Stock On hand for Count Lines** – this will display the expected On Hand quantity in the Count Lines.

vii. **Picking Classes tab:** - this allows you to restrict the employee to picking only items belonging to certain Picking Classes. Picking Classes are defined in Inventory Settings and each item in the inventory can be assigned to a Picking Class if required.

3. Style Templates:



The following have been added to Style Templates:

i. **Template Group** – You can now group your templates so that all templates of the same group will appear together in the template selection list. This should make it easier to look for templates.

Template Groups are defined in Mobility Settings.

ii. **Creation Style when selecting Purchase** and **Creation Style when selecting Count** – these two creation styles are added to cater for Purchase Receipting and Inventory Count functions.

iii. **Style Image** – You can now select an icon to represent your template. This icon will be displayed next to the template name in the Template Selection list in Freeway. There are about 20 images to choose from.

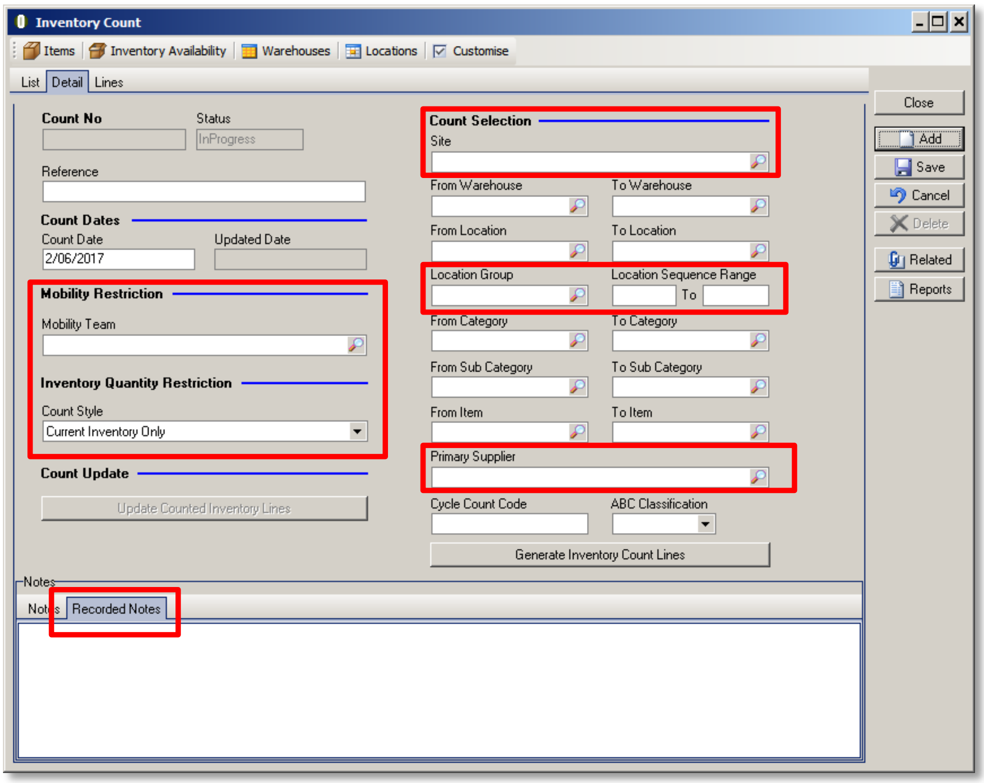
iv. **Template Types** - The following types have been added :

a. ASSYPICKING
b. ASSYRECEIPTING
c. COUNTLINES
d. JOBPICKING
e. PURCHASERECEIPTING

4. **Other miscellaneous stuff**:

- **Datasheet ID** is now displayed as the first item in the Info section of the datasheet template in Freeway.

- **Inventory Count screen** in Ostendo:



a. **Mobility Restriction** – you can restrict this Count to be carried out only by a certain team.

b. **Inventory Count Restriction** – the selected **Count Style** determines the types of items that will be included in the count:

   i. **Current Inventory Only** – only items that have a positive or negative On Hand quantity.
   ii. **Current Inventory Plus Items with Past History** – the above plus any zero quantity items that have previously had transactions.
   iii. **Current Inventory Plus items with Zero Qty** – All items are included.

c. **Count Selection**

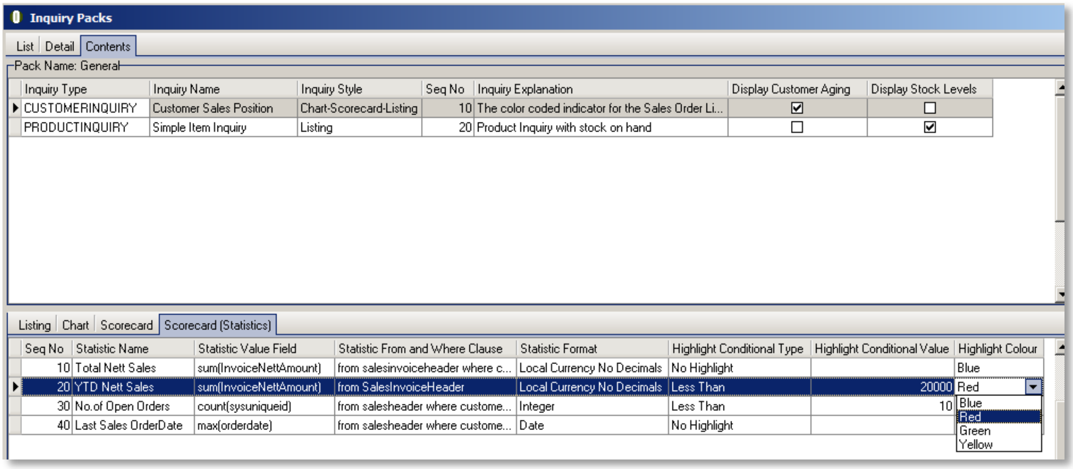
   i. **Site** – allows you to restrict the Count to items for a certain Site only.

   ii. **Location Group** – restrict the Count to items that belong to a certain Location Group.

   iii. **Primary Supplier** – restrict the Count to items from a certain Supplier.

d. **Recorded Notes** – this blob field is used to store notes recorded when the Count is performed using the Freeway app.

- **Inquiry Pack Scorecard Statistics – Highlight Colour** – you now have four colours to choose from to highlight your scorecard statistic.



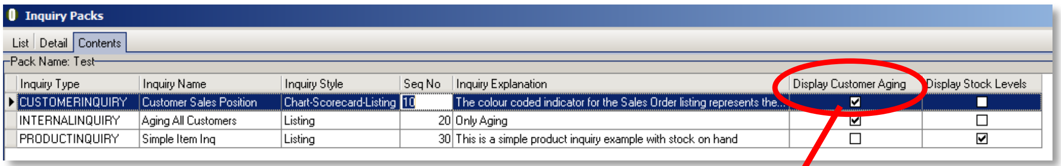
Version 474 – What's new:

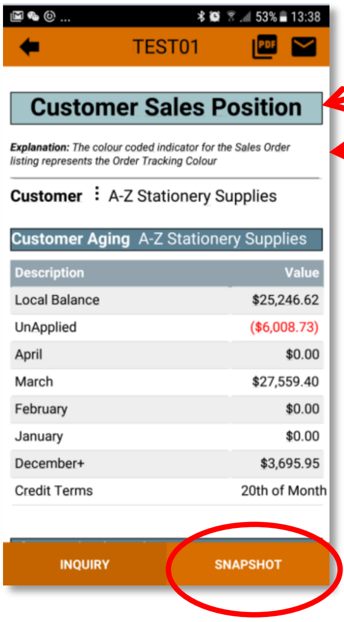
1. **Inquiry Packs :**
   This new function is designed to facilitate the generation of standard inquiries for use with the Freeway app. You can define multiple Inquiry Pack names and their associated contents in the Ostendo Mobility menu. Each mobility employee can have an Inquiry Pack name assigned.

   The contents of an Inquiry Pack can consist of one or more pre-defined inquiries.
   Each Inquiry in a pack can include one or more of the following components:

   a. Horizontal bar chart
   b. Scorecard statistics (or KPI statistics)
   c. Data listing (Header Lines and associated Detail lines)

   Optionally, the inquiry can also display Customer Aging data or Product Stock Levels.



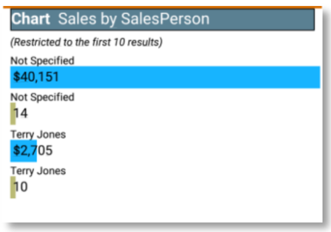


Inquiry Name

Inquiry Explanation

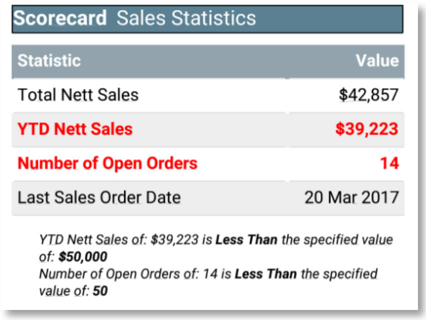
Aging Data

Snapshot button creates a screenshot and allows you to ***annotate*** and ***email*** the image to someone to follow up.



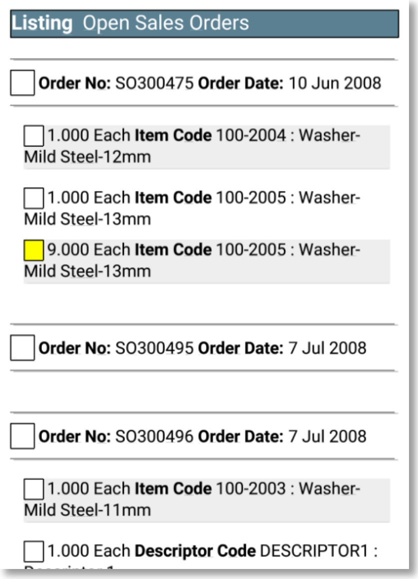
Example of a **Two Series chart**.
You can also define a **Single Series**, or **Percentage Series** charts.

You can restrict the displayed results to a fixed number if desired.



In this example, the scorecard displays four sales statistics: Total Nett Sales, YTD Nett Sales, Number of Open Orders, and Last Sales Order Date.

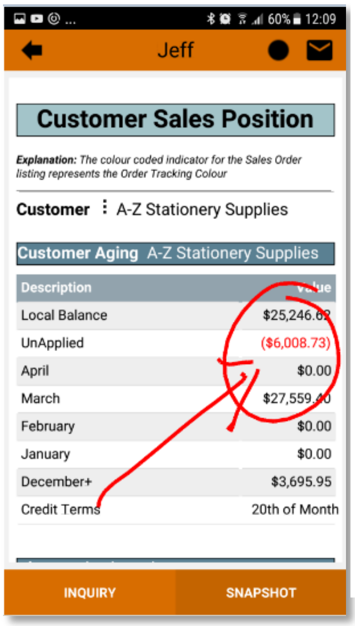
Some of the statistics can be conditionally highlighted in bold and red (e.g. if YTD Nett Sales is less than $50,000)



This Listing example displays Header and Detail data.
The Label captions for each field are all user-defined.
In this example, only the Header has label specified for the two fields (Order No. and Order Date).
Labels are optional.
In this example, no labels are used in the Detail Lines. Only the CODETYPE field is highlighted in bold.

If desired, Indicator Logic can be specified for both Header and Detail data to highlight certain records in the inquiry.
A color-indicator box will appear at the start of each line with the appropriate colour if **Indicator Logic** is specified.

Snapshot, Annotate, Audio Note, and Email:



When you hit the **Snapshot button**, you create a screen image and you can immediately **annotate it**.

You can also press the **Record button** to record an audio note. (The **round black button** next to the Email button at top right of screen.) This button will turn into a **square black button** when you press it to record your audio note.

Press the square button to stop recording your audio note.

Press the **Email button** (envelope symbol) to email the screenshot and audio note to someone.

In summary, the Inquiry Pack function of the Ostendo Mobility Menu contains an easy-to-use ***Inquiry Generator*** to create a wide variety of inquiries which can be simple data Listings, or charts, or scorecards or various combinations of these components.

Please refer to the **Ostendo Reference Help** for further details on how to create Inquiry Packs in Ostendo. There will also be a separate paper at:

http://ostendo.info/downloads/ostendo/HowToCreateAFreewayInquiryPack_474.pdf

to describe the process of creating Inquiry Packs.

2. Employee Mobility Settings – Device tab and Materials tab

The following are added:

Device tab:

- **Product Selection Style for Warehousing:**
  Options are **Manual Selection** or **Scan Barcode**.
  Manual Selection means items are selected manually from delivery list when picking the items.
  Scan Barcode means items are picked by scanning barcodes

- **StationID for POS Orders**:
  This allows you to select the POS Station ID to be associated with the user (mobile device) . With the appropriate Style Template, an On-Hold POS Order will be created using this Station ID. At the checkout cashier's station, the POS Order can be reviewed and converted into an invoice to receive payment.
  You could create an Employee Mobility Settings record for each tablet you intend to use for POS.

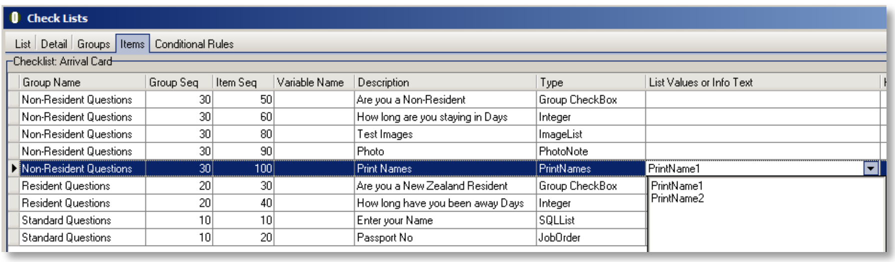
Materials tab:

- "Picking Product Inquiry Name" is now changed to "**Drill Down Product Inquiry Name**".
  When picking items in a Delivery Order with Freeway, you can drill-down on the item to see product details like Product Image and quantities available. You can also specify your own inquiry to display other information pertaining to the item. This Inquiry name must be defined in an **Inquiry Pack Content** record.

- **Default the Picking Qty**:
  Ticking this box allows you to default the Pick Qty to the remaining quantity to be picked. This will save the user from having to enter picked quantity for every item picked. The user can overwrite if required.

3. New CheckList Type – PrintNames:

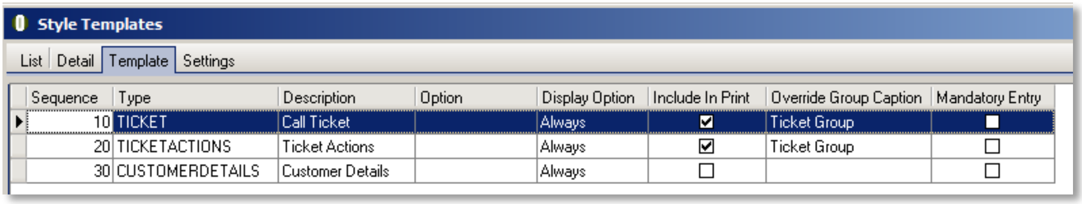
There may be datasheet templates which could have multiple printout options. This checklist item allows the selection of a preferred PrintName from a pre-defined list.



4. Style Templates:

a. Override Group Caption

If you wish to group several template items under a common group name, you can enter the same Override Group Caption for each of those items. All the items in a group should be listed one after another in the template.



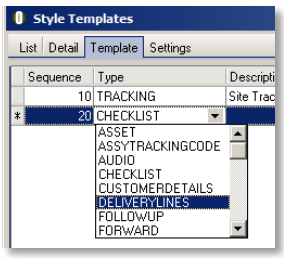
b. Mandatory Entry

You can now indicate whether a template item MUST be actioned by ticking the Mandatory Entry box.

c. New POS Order

In “Creation Style when Selecting Customer”, you now have a new option- **New POS Order**.
This template will create a new On-Hold POS order in Ostendo.
This will provide the ability for a sales rep with mobile device to go round the warehouse or store with a customer to enter items into this POS order. When the customer has finished picking what he wants, he can just go to the checkout cashier and the cashier can then convert the on-hold POS order into a POS invoice and receive customer payment.

d. New Template Types for Sales Delivery Picking



DELIVERYDETAILS and DELIVERYLINES
This new template types are applicable to Delivery Orders only.

When **DELIVERYLINES** type is specified, it will ***dynamically*** pull in the Delivery Lines from the associated order each time the datasheet is opened. This means the latest delivery lines will be displayed each time the Delivery datasheet is opened.

If the Delivery Mode of the Mobility User is “**Proof of Delivery**”, then the user can only view and/or print the lines only.

If the Delivery Mode is “**Delivery Pick**”, then the user can proceed with picking of each of the Delivery Line.

DELIVERYDETAILS will automatically generate a checklist to collect the following information:

Picking and Packing Status:
Picking Complete - this is a checkbox to indicate if picking is completed for the delivery order.
Packing Complete - this is a checkbox to indicate if the items are all packed.

Delivery Shipment Details:
Actual Weight (Kg) - enter the weight of the shipment here
Actual Volume (M3) - enter the volume here
Number of Pieces - enter the quantity here

Freight Information:
Shipping Reference - enter shipping reference here
Specified Shipping Method - enter shipping method here
Override Standard Freight Charge - tick this checkbox if required
Specified Nett Freight Charge - enter value here

All the above checklist items are optional. Use as required.
When the datasheet is completed and synchronized with Ostendo, these details will be used to update the Delivery Order.

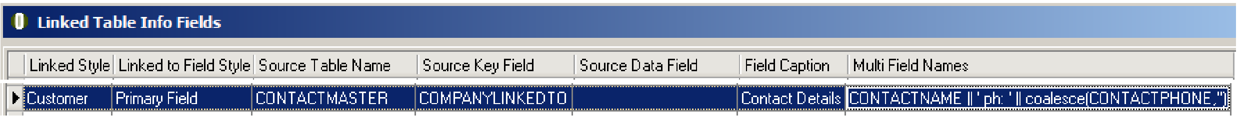
Sales Delivery Picking requires a ***live connection with the Ostendo database*** as the delivery lines are dynamically updated during picking.

5. **Note Names – Copy to POS Instructions**

   If your New POS Order template have a Note type, then ticking this checkbox will copy the notes entered to the Instructions in the POS order created in Ostendo.

6. **Linked Table Info Fields – Multi Field Names:**

   Instead of displaying one field at a time, you can now define a string of concatenated fields to be displayed together. Use the **Multi Field Names** to do this.



Version 421 – What's new:

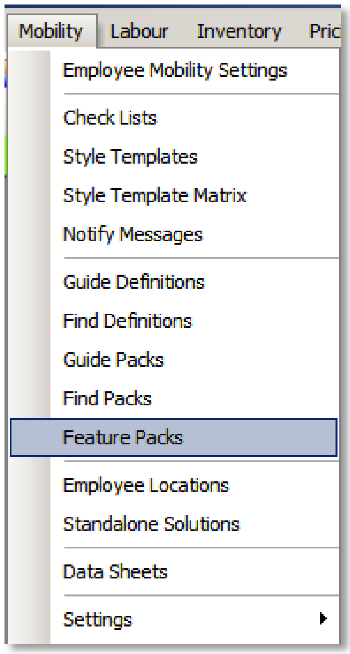
1. **Ostendo Freeway logo and icon :**
   This version comes with a new logo, icon and tagline.

ostendo
freeway
record data - share knowledge

There are no other functional changes or additions in this version.

Version 411 – What's new:

1. **Feature Packs :**
   In Item Mobility and Web (and Descriptor Mobility and Web) screens you can enter specific **Features** for each Item or Descriptor.



   However there may be other features that you wish to include which applies across all items/descriptors (e.g. the Standard Sell Price).

   So instead of adding Standard Sell Price as a feature in each and every Item or Descriptor, we can use **Feature Packs** to do that.

   Feature Packs also allow you to pull in all associated **Item Properties / Descriptor Properties** to be included as Features.

   If no Feature Packs are defined, then you will only see the features defined for each individual item / descriptor via the Item/Descriptor Mobility and Web screens.

   You can have multiple Feature packs defined to meet the different needs of different groups of Freeway users.

   A Freeway user can have only **one Feature Pack name assigned**, but that pack can have many **Feature Groups**.

   Feature **Group Names** are defined in Inventory -- Settings.

   a. **Feature Styles :**
      Feature Groups can either be "**Standard**" style or "**Properties**" style.

      The "**Standard**" Feature Style applies to all items (or descriptors, or catalogue codes).

      The "**Properties**" Feature Style will take all properties associated with the items/descriptors and generate them as features to be included in the Features Pack.

   b. **Feature Description**:
      If "**Standard**" Feature Style, then the description can include **merged fields** from the ItemMaster or DescriptorMaster. Merged fields are Fieldnames enclosed by double square brackets (e.g. **[[**STDSELLPRICE**]]**).

2. **Style Template –**

NEWGUIDE type
There is now a new template item type called NEWGUIDE.

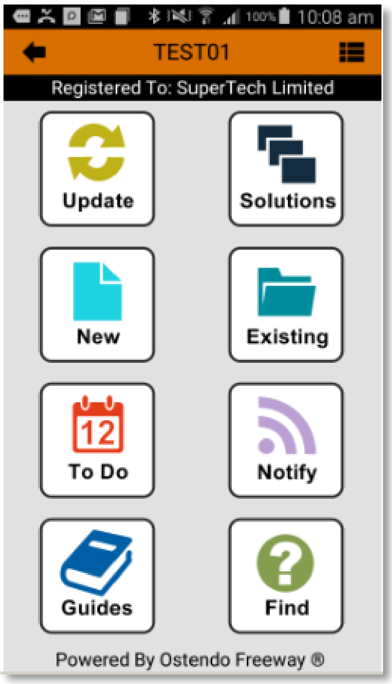
Adding this NEWGUIDE type to your template will allow you to create a draft User Guide.

This will create two sections in the datasheet:
- One section to enter Guide Name, Guide description, and Guide Notes
- The next section to create Guide Slides (with Slide Name, Slide Description, Slide Image, Slide Notes, and Slide Sequence).

The general idea is to provide you the capability to use the Freeway App to create guides or documentation as you go about doing the actual work in the field by taking pictures and adding notes.

The final Guide or documentation can be published after reviewing and editing the initial draft created.

Version 404 – What's new:



1. **Guides button :**
   Guides are pictorial documentation that can be added to Freeway solutions to provide help to users. The **Guide button** displays the pack of guides which are made available to the Freeway user.

   Guides consist of a series of pictures or images with accompanying notes (a storyboard). Examples of Guides would be Assembly Guides for a kitset, How-To guides, Diagnostic guides, etc.

   In the Ostendo Mobility menu, two new functions are added to help set up the Freeway guides: - **Guide Definitions** and **Guide Packs**.

   Guide Definitions enables you to create guides by compiling a set of slides (images) with accompanying HTML formatted notes.

   Guide Packs allow you to assemble sets of guides which can be assigned to Freeway users. This provides the flexibility to allow different users to have access to different guides.

   Guide Packs can have one or more groups of guides, and each group can have multiple guides.
   Guide **Group Names** are defined in Mobility Settings.

2. **Find button :**
   The Find button enables the Freeway user to look for information related to the solution. It displays the pack of **Find Catalogues** and **Find Information** available to the user.

   In the Ostendo Mobility menu, two new functions are added to help set up the Freeway guides: - **Find Definitions** and **Find Packs**.

   Find Definitions have two styles - **Catalogue** and **Information**.

   Catalogues are collections of materials (items / descriptors) which could include images and notes, while **Information** styles are made up of textual elements.

   Find Catalogues are defined by the Hierarchical Names and the associated Item / Descriptor Mobility and Web definitions.

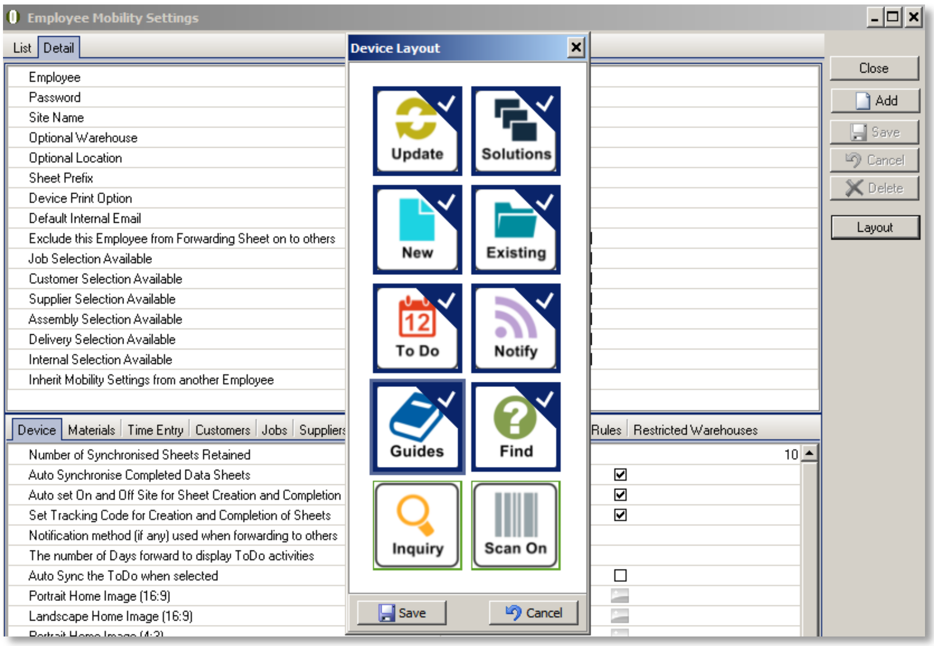
   Find Information is further defined by information **elements** which contain the textual contents (in HTML format).

   Find Packs allow you to assemble sets of Find Catalogues and Information which can be assigned to Freeway users. This provides the flexibility to allow different users to have access to different Find contents.

   Find Packs can have one or more groups of Find Catalogues and Information, and each group can have multiple sets of Find Catalogues and Information.
   Find **Group Names** are defined in Mobility Settings.

3. Device Layout

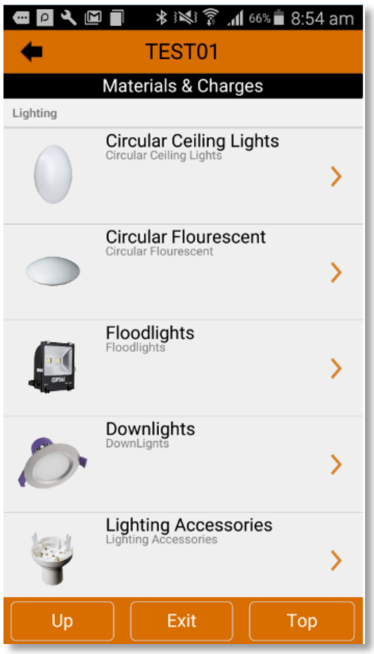
There are two additional button icons in the Front Screen layout editor.

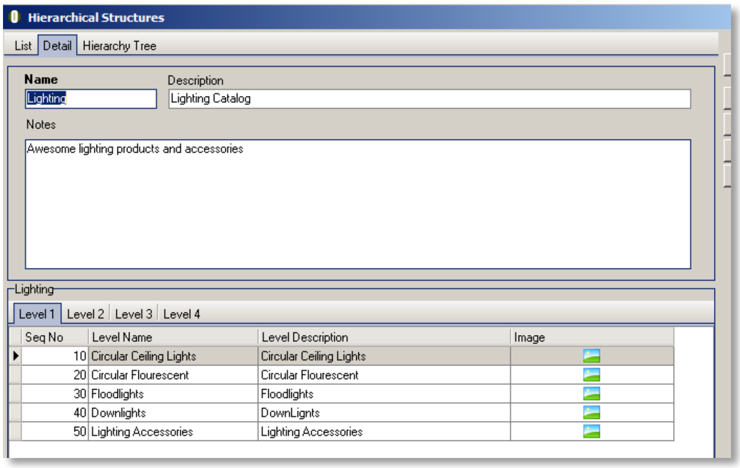


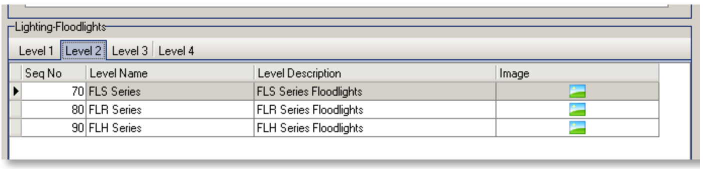
The Guides and Find buttons can be activated by moving them into one of the top 8 positions. (The bottom 2 positions cannot be activated as only a maximum 8 buttons can be Active at any one time).

Version 389 – What's new:

1. **Hierarchical Structures for Materials Lists (Items and Descriptors):**
You can now organise and present your Material Lists in a hierarchical structure. In the General Menu in Ostendo, there is a new item called Hierarchical Structures. Starting with Level 1, each line in each level can have sub-levels (up to 4 levels).

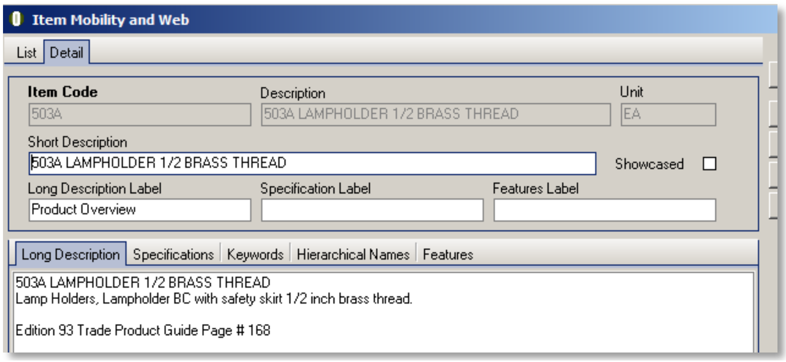






Each line in the structure represents a level or sub-level and can have an image associated with it.

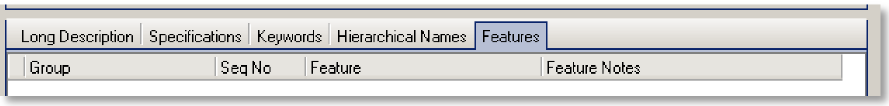
2. **Item Mobility and Web (and Descriptor Mobility and Web):**
This is a new function in the Item Related Menu (same for Descriptor).



This allows you to provide the following:

- **Short Description** : A short description of the item or descriptor
- **Long Description** : A longer description
- **Specifications** : Technical specifications if relevant
- **Keywords** : Keywords are used for searching (like webpages)
- **Hierarchical Names** : This is where you link the product to the hierarchical level. A product can be linked to multiple levels.

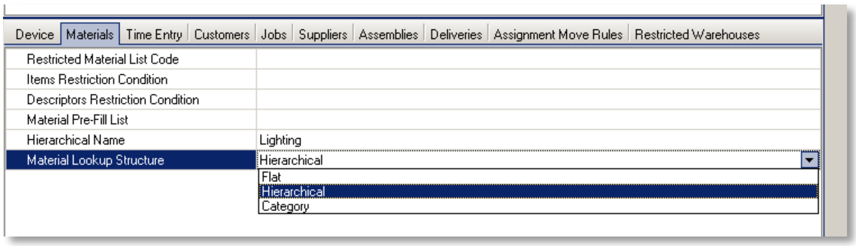
- **Features** : Features are additional features associated with the product. Features can be grouped under a group name and each feature can have additional notes to describe it.



This is to support the requirements of **e-commerce** websites and **Freeway mobility** app.

3. **Feature Groups:**
In Inventory Settings, this new function allows you to define Feature Group Names to be used in the Item Mobility and Web screen.

4. **Employee Mobility Settings – Materials tab:**
You can now link a Hierarchical Name to an employee and specify the Lookup Structure as well.



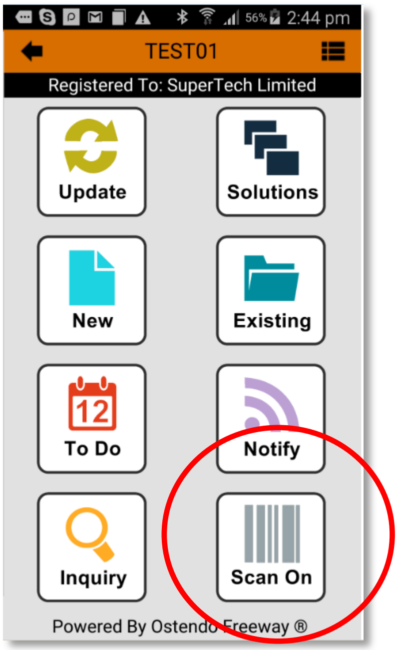
- **Flat** : Just a simple list (no hierarchy).
- **Hierarchical** : Use the hierarchical structure named above.
- **Category** : Use the standard Ostendo Categories and Sub-Categories structure. (***You can now link an image to each Category and Sub-Category***).

5. **New Mobility Rules:**
These new rules allow you to specify default labels for Long Description, Specifications, and Features labels.

<u>Having a pictorial, hierarchical structure makes looking for items much easier. Check it out for yourself.</u>

Version 372 – What's new:

1. **Scan On Button**
   The Scan On button replaces the About button on the Main screen. The function of the Scan On button is to provide Freeway users an easier way to start or continue a datasheet.



   The Scan On button enables you to scan a barcode which represents one of the following:

   a. A Customer
   b. A Supplier
   c. A Job
   d. A Customer Asset
   e. An Assembly
   f. A Delivery
   g. An Employee

   For example, previously, to initiate a new Service datasheet for a Customer, you may go through the following process:

   - Click on NEW button and select a Customer
   - Then select 'Create New'
   - Then select the StandardService Style template

   Now, if you have defined in Employee Mobility Settings – Customers tab – the "**Fixed Customer Style Name for Scanning**" as StandardService , then you could accomplish all the above steps by merely using the Scan On button to scan the Customer barcode number.

   Depending on which of the above barcode is scanned, Freeway will either initiate a new datasheet or display an existing datasheet for that barcode number.

2. **Style Templates –**

   Settings tab - Labour Charge style

   In the Style Template – Settings tab, you can now specify the Charge Style (either for a specific employee or for all employees) as either **Chargeable** or **Non-Charge**, as well as the Non-Charge cost centre code.

3. **CheckList types**

   - The drop-down list for CheckList Types is now sorted in alphabetical sequence.
   - There are three new CheckList Types
     - **ImageList**
     - **JobOrder**
     - **SQLList**

     ImageList type allows you to display a list of images for selection. Upon selection of the desired image, the **Option Name** associated with the selected image will be the value of the Checklist item. This is useful when using pictures is more user friendly then using part numbers for selection (e.g. sales catalogue).

JobOrder type allows you to display a list of Job OrderNumbers which are on the Freeway device for selection. The selected ordernumber will be the value of the Checklist item. This is useful when you want to associate a datasheet with a particular Job OrderNumber.

SQLList type allows you to display a list of values from an SQL query for selection. The SQL query must select only one field, e.g. select itemcode from itemmaster where itemcategory = 'BOLTS' .
The selected value will be the value of the Checklist item.
You can also include the **#employeename#** parameter in the SQL statement if necessary. The #employeename# parameter will pass the Freeway employee name to the SQL statement.
e.g. select ORDERNUMBER from PURCHASEHEADER where BUYER = #employeename#

Version 329 – What's new:

1. Style Templates
   A new **Settings tab** has been added to Style Templates. Here you can specify the following for each employee or all employees using this template:

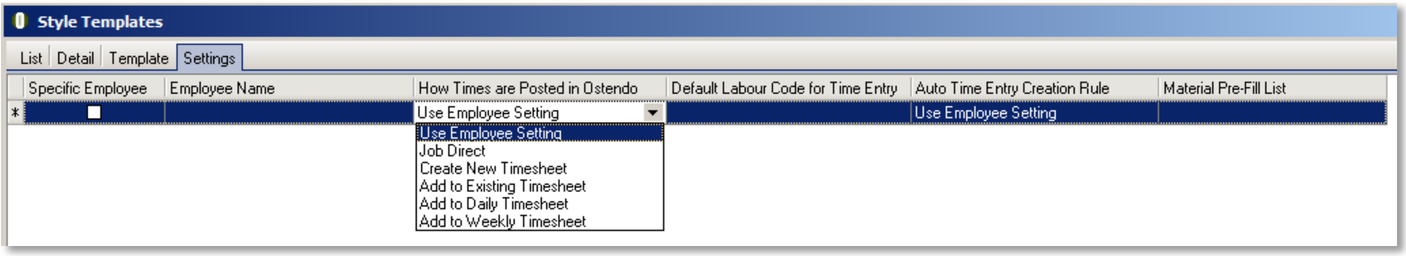
   a. How Times are Posted in Ostendo - Options are:
   i. Use Employee Setting
   ii. Job Direct
   iii. Create New Timesheet
   iv. Add to Existing Timesheet
   v. Add to Daily Timesheet
   vi. Add to Weekly Timesheet

   b. Default Labour Code for Time Entry :
   Select from pre-defined list of Labour Codes.

   c. Auto Time Entry Creation Rule - Options are:
   i. Use Employee Setting
   ii. Auto Insert Time Entry on Sheet Creation
   iii. No Auto Insert of time Entry

   d. Material Pre-fill List - Options are**:**
   Pick from pre-defined lists of materials.

   The Style Template Settings tab takes precedence over the Employee Mobility Settings.



Version 319 – What's new:

1. Style Templates

    a. Internal Data Sheet – a new Creation Style - "**New ReStock Order**" .
    When completed and sent back to Ostendo, this data sheet will generate "Planned" Purchase Orders for the items and quantities. This provides a simple way to raise Purchase Orders to restock supplies in the office or shop.

    b. JobType, PurchaseType, and SalesType can now be specified for a template which is used to create orders. This overrides the defaults specified in the Employee Mobility Settings.

2. Mobility Settings –

    Note Names
    - **Include Materials in Note**
    - **Include Times in Note**

    When these are ticked, the Materials and Times data entered in the data sheet will be appended to the Note when the completed sheet is sent back to Ostendo.

3. Mobility Images (in ITEMMASTER and DESCRIPTORMASTER) – you can now use both **png** and **jpeg** files to load your images.

    For **Graphical** Material Lookup Style, the **mobility images** loaded to the item or descriptor records should be square and recommended size is **256 by 256 pixels**.

4. Description Fields for Materials (ITEMDESCRIPTION and DESCRIPTORDESCRIPTION) – you can now enter and save up to **200 characters** for descriptions.

This concludes our quick introduction to Ostendo Freeway Mobility solutions. We trust that you will find these functions and features to be extremely helpful in building and implementing mobility solutions to meet your specific needs.