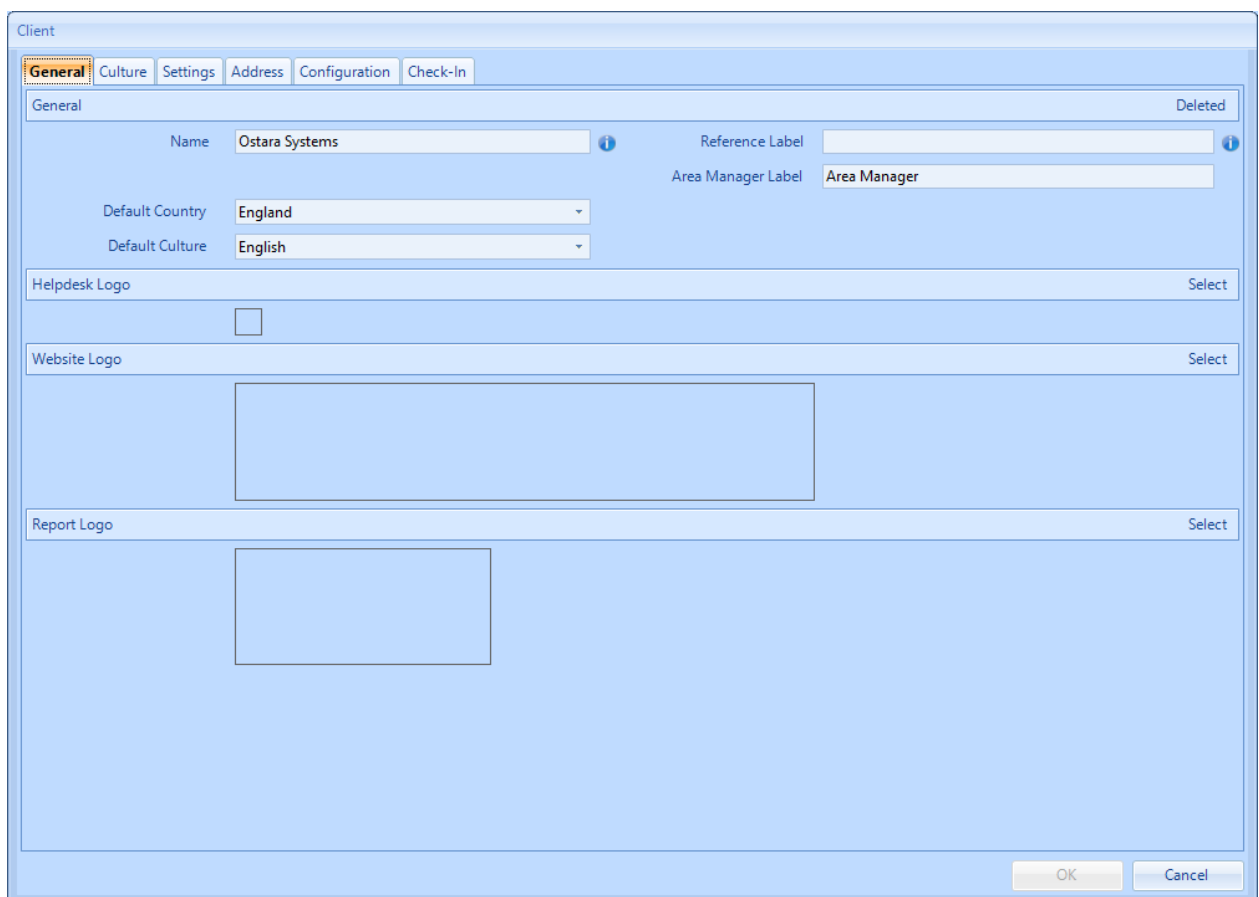


Client Configuration

Wed, Jan 17, 2024 System

In the system, Clients will be added to the system as a “Client” and if any details concerning the Client ever need to be changed, such as the Client name, then this is possible by going to the “Client Configuration” section.

1. The first step is to select the Client that will be used. For information on how to do this, see the [Client Selection](#) page
2. Once the Client is selected, the Client screen is shown with 6 tabs: General, Culture, Settings, Address, Configuration and Check-In. On the General tab, the User can change the Name of the selected Client, the default Country and Culture of the Client as well as the logos that are seen in the Ostara system and on the Web Portal. The User can also add in a Reference Label, which can be used within the API. Finally on this screen, the terminology used by the Client for their "Area Manager" job role is also specified here.

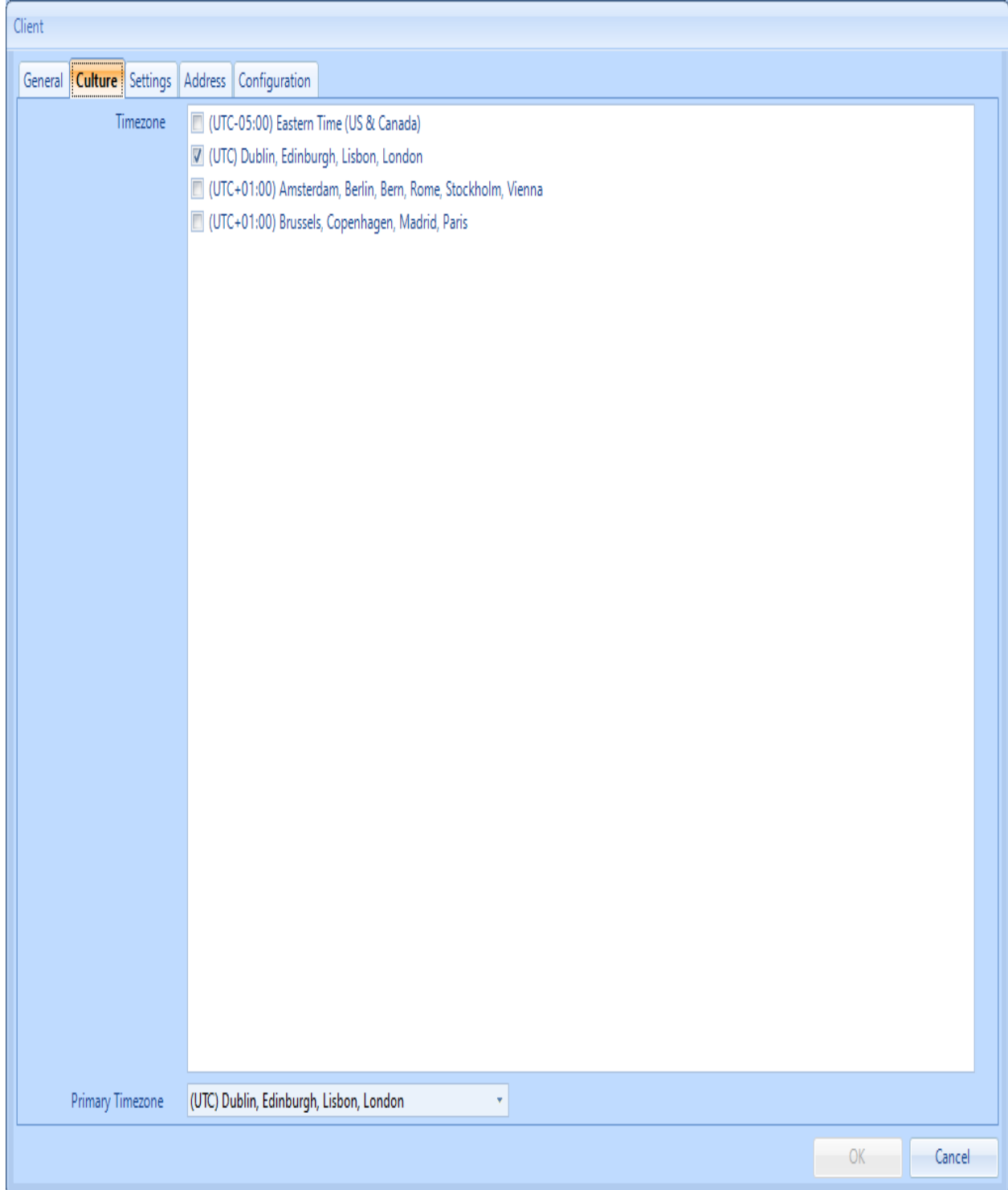


The screenshot shows a dialog box titled "Client" with a "General" tab selected. The "General" tab contains the following fields and options:

- Name:** Ostara Systems
- Reference Label:** (empty)
- Area Manager Label:** Area Manager
- Default Country:** England
- Default Culture:** English
- Helpdesk Logo:** (empty) Select
- Website Logo:** (empty) Select
- Report Logo:** (empty) Select

At the bottom right of the dialog box are "OK" and "Cancel" buttons.

3. The Culture tab shows a list of Timezones available in the system along with the Primary Timezone selected for the Client. The relevant Timezones can be ticked from here as well which Timezone is the primary.



4. The Settings tab contains a list of settings that are used within the Ostara system. These are used to control certain aspects of the system and can only be accessed by Ostara Admins.
5. The Address tab contains contact details for the selected Client. By default, this section will not contain any information as it is all derived from the System Settings. However by ticking "Override Address", the User has the option to enter in specific details relevant to the selected Client. This includes a main address and any primary contacts. Details entered here will be used for the selected Client rather than the details configured in the System Settings.

Client

General Culture Settings **Address** Configuration

Override Address

Address

Town

County

Postcode

Country

	Attention Of	Phone	Email
Primary	<input type="text"/>	<input type="text"/>	<input type="text"/>
Response	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notification	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contract	<input type="text"/>	<input type="text"/>	<input type="text"/>
New user	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

6. The Configuration tab is similar to the Settings tab in that it contains a set of system configurations that are used within the Ostara system. There are also used to control certain aspects of the system and can only be accessed by Ostara Admins.

7. The Check-In tab is where the configuration settings for Mobile usage is managed. This allows the User to control whether the Mobile Check-In process is turned on, whether both Start AND Stop requires the Check-In process to be followed, and how long a Check-In action lasts for on the Mobile device before the Mobile User needs to Check-In again (Duration - in Minutes).

It is also possible to control whether Internal Resource to the Client needs to follow the Check-In process or not.

Finally, the section in the below image entitled "Available Modes" configured whether any of [Powred by PHPKB](#) (Knowledge Base Software)

the different Check-In methods are enabled for this Client and whether the absence of usage of one of these Check-In methods will result in Unapproved Invoice reasons being added to the submitted Invoices for these Work Orders.

The screenshot shows a software window titled "Client" with a tabbed interface. The "Check-In" tab is active. The settings are as follows:

- Enabled:
- Check-in on Stop Job:
- Duration: [Dropdown menu]
- Internal Resource Requires:
- Scan Code Instructions: To check in using a QR code find the scan point within the building. There will be an image that looks like the example shown
- Unapproved Warning Message: NOTE: This is not the approved method of check in and will require you to submit signed worksheets for your time on site
- Available Modes:
 - Bluetooth Beacon: [Dropdown menu]
 - GPS: [Dropdown menu]
 - QR Code: [Dropdown menu]
 - Manual Search: [Dropdown menu]

Buttons for "OK" and "Cancel" are located at the bottom right of the window.

Note: Bluetooth is our proprietary hardware that can be installed at each Building, ensuring that Mobile Users can only start works when within the short range of those Bluetooth Beacons. If you would like to discuss Bluetooth Beacon options, please speak to the Ostara Support Desk.

Note: GPS is the ability to use GPS coordinates, set at the Building and comparing the Mobile User's coordinates with the Building coordinates. Subject to a degree of flexibility, if the User is within range of the Building, they will be able to action Work Orders at that Building.

Note: QR is the backup/default method of Checking In. This allows for a printable QR code to be given to site for the inclusion in their Visitors/Signing In Book, so that attending operatives can use the QR code to confirm attendance.

8. Once any details have been made, click "OK" to apply the changes. To discard the changes, click "Cancel".

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=4>