BlackBerry Phone Client Quick Start Guide

Introduction

FCmobilelife by FranklinCovey is a real-time mobile communication system that supports collaboration in small groups. A group of connected FCmobilelife users is called a team. Team members can assign and track Tasks for themselves and others, they can create and share events on their calendars (Schedules) and they can exchange informational multi-media messages (Posts). Collectively, all these collaborative messages are called Actions. The key to these communication features is the real-time delivery of new and updated Actions to the web client or the phone and status tracking for all Actions. The Task feature is a good illustration of the collaborative power of FCmobilelife: using the web or your phone, you can create a Task and send it to a colleague. You are notified as soon as the Task is viewed by the recipient. After they view it, the recipient can either accept or decline the Task and you are also notified of that choice in real-time. If the Task was accepted, the recipient can mark it as completed when they finish the Task. Again, you are notified of the completion as soon as it occurs. Thus, FCmobilelife provides complete accountability and tracking for collaborative task management. In addition to the collaborative Actions, you can create your own personal Goals, track them and link them to Tasks that are in support of your Goals.

The FCmobilelife solution is a self-contained group collaboration system consisting of a FCmobilelife server that communicates with FCmobilelife web and phone clients. No user supplied server hardware or software is required (e.g., Microsoft Exchange or Microsoft Outlook).

The rest of this guide walks you through the use of the Web Client version of FCmobilelife. NOTE: It is assumed that you have already registered for an account and installed the application on your phone. If you have not, then please go to

http://www.fcmobilelife.com/

to register for your FCmobilelife account, set up your account preferences and download the application.

Starting the BlackBerry Client

Select the FCmobilelife program icon from the BlackBerry Home screen or Application folder to start the application. In the screen below, the FCmobilelife icon is the highlighted (first) icon on the desktop.

The first time you start the application you will need to login with the screen below.

Enter your username (which is the email address you registered with) and your password. Wait for authentication and syncing to complete and the home screen to appear:

You can navigate to the different functions (Schedule, Team, etc) by using the five way control. The menu selections can be used to jump to the creation of a new action or to do other functions. The menu selections are shown on the next screen shot.

The various **New** … selections bring up screens to create that type of action. **Sync New/Updated Actions** and **Full Sync** should not normally be needed since the data on your BlackBerry will be updated automatically. **About** shows an application About screen. **Change User** lets you login as a different user (rarely used).

Setting up your Team

Highlight and select the "Team" icon from the home screen. This will bring up a listing of your team (which will be empty the first time you start the application). In any case, you will start from this screen to add team members.

The FCmobilelife. service uses an invitation only contact model. You can ask (invite) someone who is already a FCmobilelife user to be on your team. They will receive an invitation email.

If they accept:

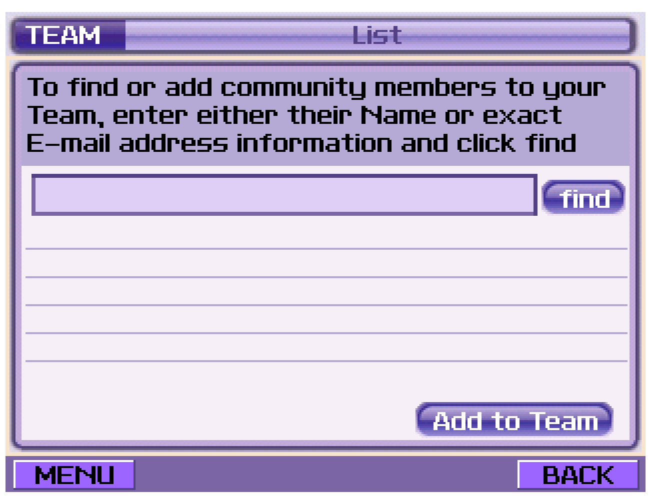
- They get added to your team.
- You can send actions (Posts, Tasks, and Schedules) to them.
- You get added to their team automatically and they can send actions to you.

If they decline (block):

- You cannot send actions to them.
- They cannot send actions to you.

To invite someone,

- From the Team Manager screen, highlight the <Find> entry and select to bring up the search screen.

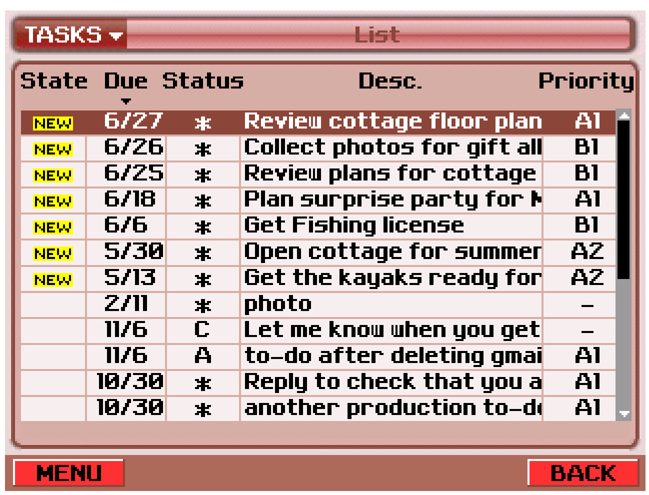


- Enter full or partial name of the contact and click "Find". Alternatively you can enter an email address. Note that for privacy reasons, partial searches are not done on emails so you need to enter a complete email address.
- The matching contacts will be shown in a results window.
- Select the contact that you want and click “Add to Team”. (Note, if you get more than one match from your search and cannot determine which contact you want, then you will have to rerun the search using the contact’s complete email address in order to get a unique result.)
- An email invitation will be sent to the contact you selected. As soon as they accept, they will appear in your team list

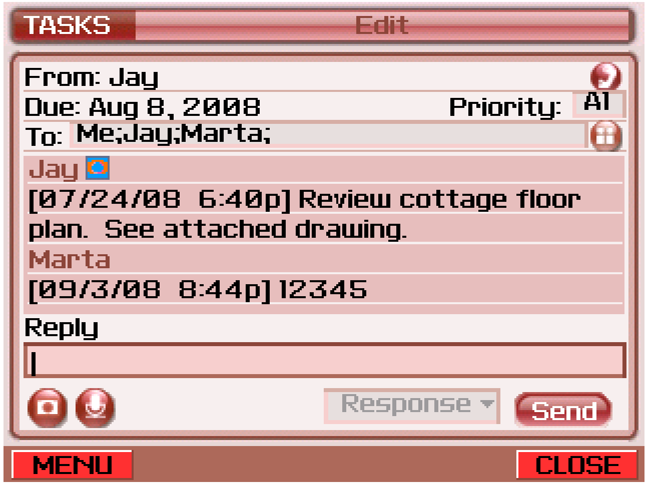
Using the BlackBerry Client

The home screen lets you navigate to lists of the various FCmobilelife actions (Task, Post, Schedule, Team and Goal). You can cycle through the selections with the track ball or the arrow keys.

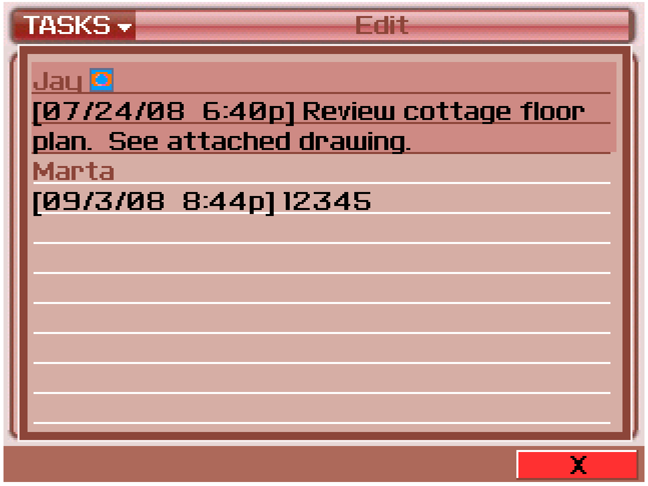
If you navigate to the Task icon (as shown above) and select it, you will bring up a list of your Task actions.



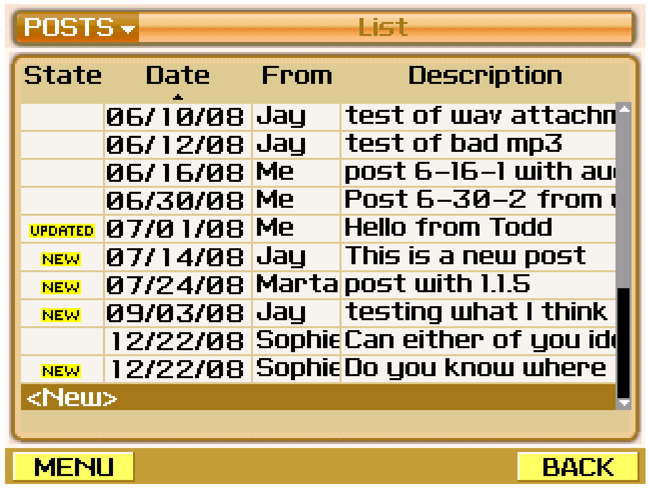
The first column shows the status of the action (either an update to an existing action or a new action). The second column shows the due date of the Task. The third column indicates the status of the Task: A=accepted, C=Complete, etc. (If the Task has multiple recipients, then the status is shown as an asterisk if there is different status for different recipients.) The fourth column is the description. The last column shows the priority of the task. Here is an example of a Task selected from this list:



Note that the date sent is shown, as well as who sent it and who all the recipients were. The text indicates who added what text. In this case there is only a message from the sender (Jay) at this point. The blue camera icon in the message area next to the sender's name indicates that there is a photo attached to this task. The "detail" note at the bottom of the message also indicates either an attachment or more text in the message. If you click on the message area, it will bring up a detail view of the message and from this you can select and click on any attachment icons to download and see (or hear) the attachment:



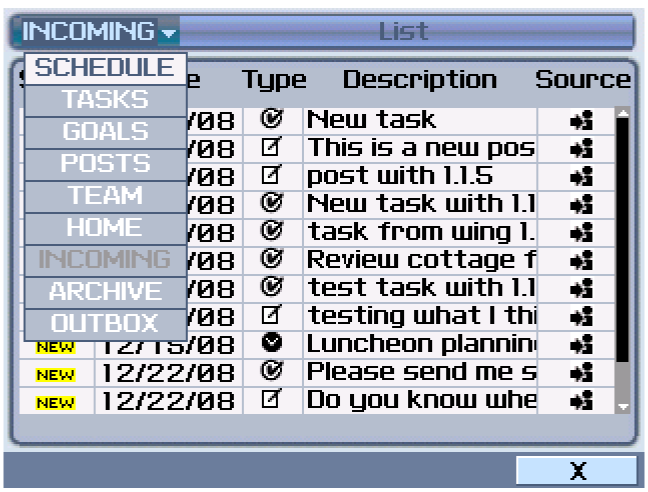
The other lists of actions are similar. For example, here is a list of Posts which always contains all the active Posts that you have sent and received. Note that on any list of actions (posts, tasks, etc.) you can sort the list by any column. To sort, highlight the column header and hit enter. If you hit enter again it will reverse the sort order.



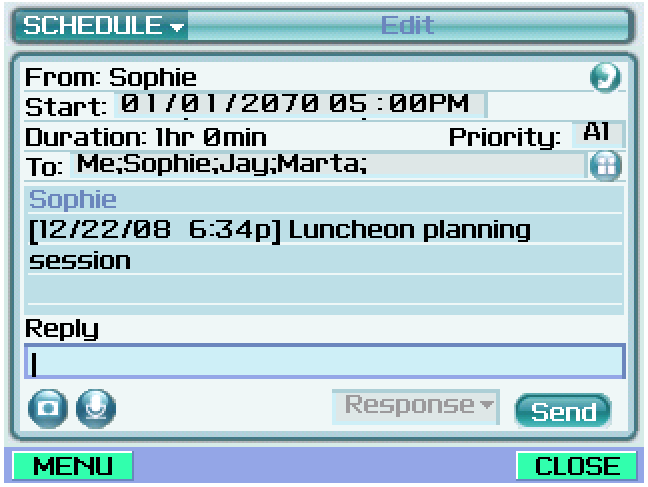
Receiving a New Action (Schedule)

When you receive a new or updated action, it will appear in your Incoming list. You can view your incoming list from many of the menus by selecting Incoming List. (Be aware that actions that you read and respond to will be removed from your incoming list, but they will still be on the appropriate active action list (based on their type) until you delete or archive them.)

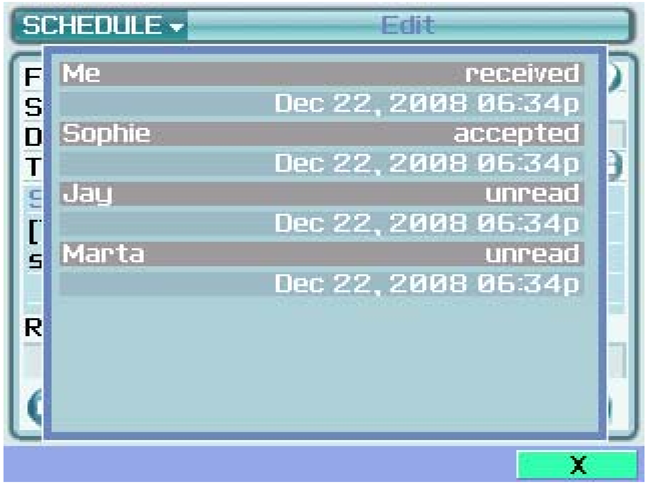
The first column shows the status of the action (either an update to an existing action or a new action). The second column shows the date, the third column shows the type of the action (Task, Post or Schedule). The fourth column is the description. The last column (Source) indicates whether this is an action that you sent to someone else (the arrow points away from the figure), an action that someone sent you (the arrow points in) or an action that you assigned to yourself (no arrow). You can highlight any action and select it (with the center key on the five way or tapping it with the stylus) to bring up the details of that action. You can also use the menu at the upper left on this screen (and on many others) to navigate to other areas of the application. The following screen shows that menu activated.



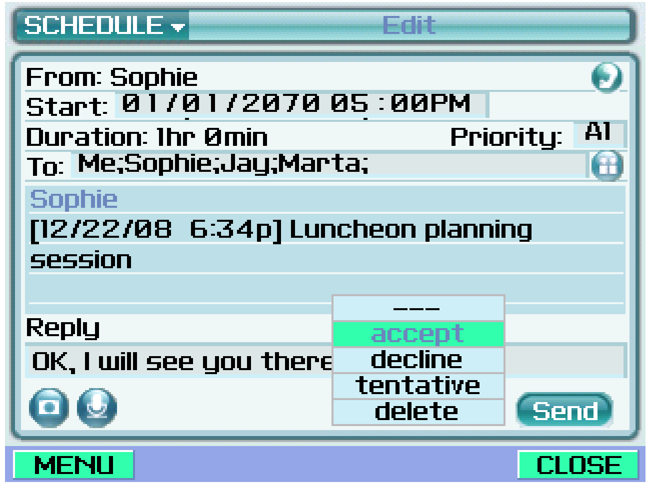
Again, if you highlight a particular action on your incoming list and click on it, it will bring up the details for that action. In this example we will look at a new Schedule action that a user has received.



The screen shows all the details about the action such as who sent it ("Sophie" in this case), who received it, the date, time and duration etc. If you highlight the To list and select it, you will see the current status of this schedule for all the recipients.



For a Schedule action like this one, you need to select your response using the response menu (you can select accept, decline or tentative). When you respond, you can also add a text reply in the "Reply" box as well as attachments. In the example above, the sender Todd has accepted the Schedule, but the recipient Marta has not read it yet. Here is your response screen with a reply entered and the response "accept" selected.


SCHEDULE
Edit
From: Sophie
Start: 01/01/2070 05 :00PM
Duration: 1hr 0min
Priority: A1
To: Me;Sophie;Jay;Marta;
Sophie
[12/22/08 6:34p] Luncheon planning session
Reply
OK, I will see you there
---
accept
decline
tentative
delete
Send
MENU
CLOSE

Creating New Actions

To create a new action, you select the appropriate **New…** menu from one of the list screen. This will bring up an edit screen for a new action. This example is for a new Post:

If you select the small team icon to the right of the "For" area, you will bring up a list of your team members.

Select one of more of these to be the recipients of this action. You can make yourself a recipient and you can select named groups as recipients as well.

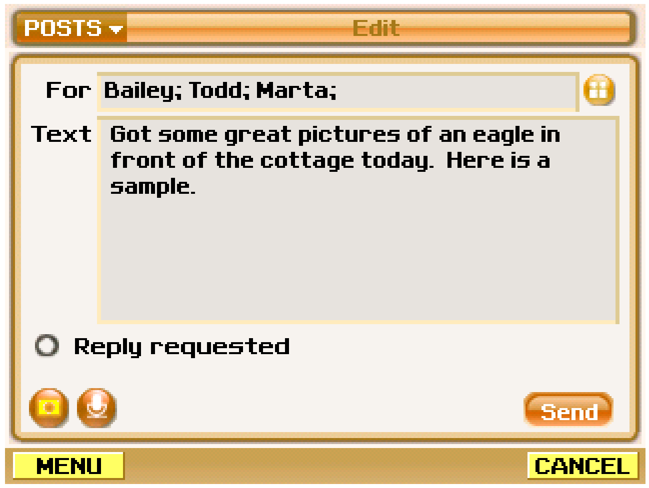
Attaching an audio file and/or a photo to the Post is done using the camera and microphone buttons in the lower left of the screen. Here is the screen to add a photo attachment.

You use this screen to either select an existing photo on your phone, or to use the phone's camera to take a new picture to attach.

Back on the edit screen, selecting the audio attachment icon, will bring up a screen that allows you to record a voice message.

The record button starts recording your voice message until you tap the stop button (the record button label changes to stop when you are recording). After you stop recording, you can record a new version of your message by selecting record again. When you are done you can save and attach the recording with the **X** (done) menu key or cancel the attachment using the "Cancel" button.

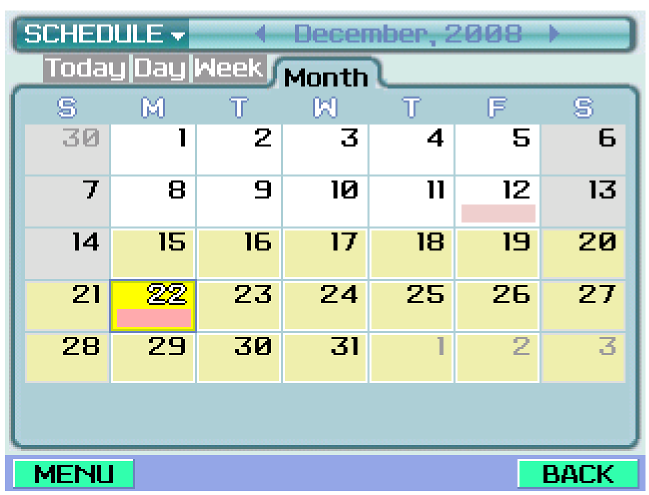
The next screen shows a Post that is ready to send. The recipients are shown, the text contains a message and a picture attachment (note that the picture icon is highlighted to indicate an attachment has been made). If you click the attachment icon, you can delete or replace the attachment before you send the Post.



When you are ready to send the Post to its recipients, select “Send”. The Cancel menu key will cancel the entire operation without sending anything.

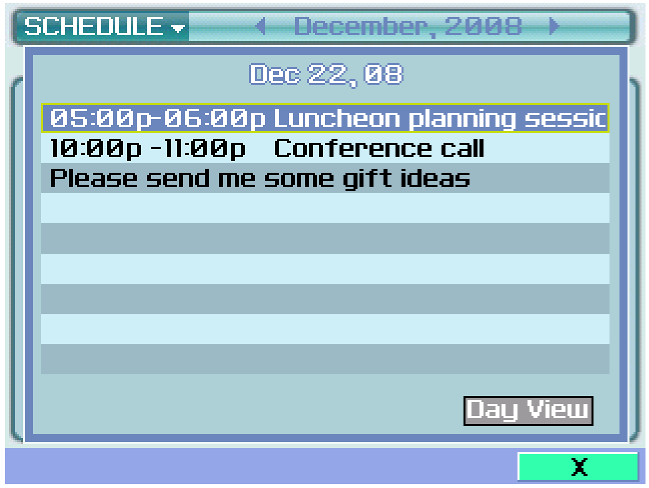
Viewing and sending Schedule actions

Schedule actions (timed events like meetings, dates and all day activities) are shown in a calendar format. You can view your calendar in a daily, weekly or monthly format. You can also see an agenda view which is a list of meetings and Tasks for a single day. Here is the month view.



A day with an all-day event shows a beige background. Timed events or Tasks are indicated with a pink box on the date’s box.

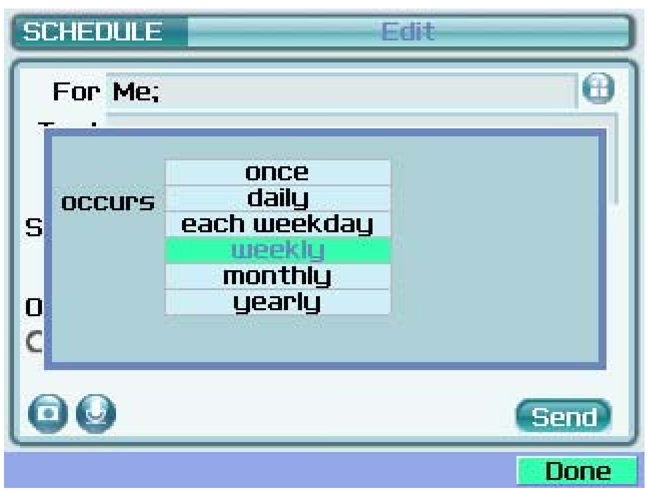
If you click on a day in the week or month view, it will bring up the day view of that day. By default, you get a list view of the schedules and tasks due for the day:



If you select the "Day Veiw" button, you can get a different view showing hourly time slots:

You can create a new Schedule item by clicking on a time slot on the daily view. For example, if you highlighted and clicked on 4PM in the screen above, that would bring up the following Schedule edit screen.

Note that the date and time are filled in (with a one hour default length). You can select the recipients by selecting the team icon to the right of the "For" field. "Me" is included by default, but you can remove it if you are setting up a meeting for others. Enter a description of the item in the "Text" field. If you want to schedule a recurring meeting, select the "once" button after "Occurs". This will bring up a set of screens that let you specify the recurrence rules for the schedule. In the screen shots below walk through the process of setting up a weekly meeting. First select the meeting frequency (weekly in this case):



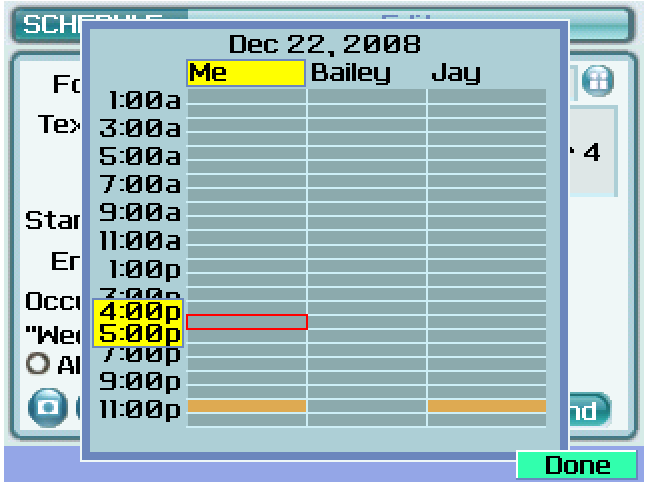
The next screen lets you select the day of the week, the weekly frequency (every week, every other week, etc.) and the duration of the recurrence (either as a fixed number of meetings, until a certain date, or forever).

After you select “Done” to finalize the recurrence, you are taken back to the main screen to set other options.

The “Show Busy” check box is selected by default. This lets other users see that you are busy in this timeslot when they use the Busy Search feature. If you also select the “Private” checkbox, then others will see that you are busy, but they will not be able to view the details of the item. Selecting “All-Day Event” overrides the hour and minute settings and simply schedules the entire day for this event (like a birthday or anniversary). You can create Schedules that span multiple days by simply selecting appropriate start and end dates Finally, you can also add attachments to the Schedule before you send it, just as you could with Tasks and Posts.

Note that while you are scheduling a meeting, you can check the calendars of your recipients to make sure they are free at the time you want to schedule. You can bring up the Busy Search screen from a button show on the recipient selection screen:

In the case of a recurring meeting, the date of the first occurance of the meeting is checked by the busy search process. Busy time slots for recipients are shown as colored bars in the display:



This has been a very brief introduction to FCmobilelife, but it should be enough to get you up and running. If you have any sign-up, installation, configuration or usage issues while using the product, please visit http://www.fcmobilelife.com and check the support pages.