
The Onboarding Process

Zebra PTT Pro –
Workforce Connect

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Introduction

Onboarding – The process of setting up a customer in the Workforce Connect PTT Pro Administrative Portal. Setting up the customer and their users in the portal, gives those users access to start using the Push-To-Talk solution.

In order to successfully on board a customer, you will need to have an understanding of who in their company is going to use PTT Pro and how they are going to use it. You may wish to draw it up on paper before jumping in to the portal. Some of the questions you need to ask are:

- Who is using the device?
- What is their role? What are they doing?
- What Features do they need?
- What Types of devices are they using?
 - Zebra
 - Consumer
 - Other Enterprise
 - Shared or dedicated
- Who needs to talk with who?
 - One to One
 - Groups
- Who needs who in their contact list?

Asking these types of questions up front, to truly understand the needs of staff communications within the organization, is very helpful in the process of onboarding a customer.

Once you are ready to onboard the customer, you will start with setting up departments. Once you have the departments set up, you will move on to the users. After that, it doesn't matter what you choose next. You may customize the user's experience with Feature Keys and Client settings or you may wish to set up groups. At this point, it's entirely up to you.

Departments

A department is a logical container, used for easily bundling users together. In many organizations, the department users likely have similar job functions, and will need to communicate with each other frequently. Many times, it makes sense to have one department for each business location. There is the ability to "Associate" departments to each other so users can find users in other locations or departments. The naming of departments will be more critical with the more departments that you have.

Reference: Zebra PTT Pro Management Portal Administrator Guide

- **Chapter 2 – Managing Departments**

PTT Pro Users

When it comes to users, you may set them up as role-based (Floor Sweeper) or named users (John Doe). Some of the questions you may ask to determine this are:

- 1) Are the devices dedicated or shared? If they are dedicated devices, it would make sense to set them up as named users.
- 2) Does that person or device stay in the same role or department each day? If they are shared devices and the device stays in the department, then a role-based user may be the way to go.
- 3) Are their users set up in Active Directory? We can integrate certain devices with AD to give the customer a shared device, named profile experience.

Depending on the number of users, they can be added one by one or there is a bulk upload feature. The bulk upload options is discussed later in this document. You can choose to send an email activation link if the user gets email on the device they want WFC PTT Pro on. Many times, when setting up a customer, it makes more sense to leave the email address blank when setting up new users. After all users are set up, you can run a user report to give you the USER-ID as well as the activation code.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 3 – Managing Users**

Contact Lists

Who needs to talk with who is always the starting question? When setting up users, there is a place within the users to select “Maximal Contacts”. If you select Maximal Contacts, that would mean **within your department**, you would show up in all other user’s contact lists and all other users would show up in your contact list. If you turn off “Maximal Contacts” when setting up a user, that users contact list will be empty. You also have the ability customize each user’s contact list. You can use a bulk upload template if you have common users that have the same contact lists. The bulk upload of contacts is discussed later in this document.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 3 – Managing Users – User Contacts**
- **Chapter 3 – Managing Users – Bulk Template Options – Bulk Add Contacts**

Talk and Message Groups

When setting up groups, WFC PTT Pro is more than just setting up people in a talk group. PTT Pro has many more features to offer. The three groups that are the most popular are Open, Closed, and Dispatch. Open and closed are very similar, whoever is in each group hears all communication regardless who initiates the call within the group. Open groups are searchable by anyone and anyone can add themselves to the group. Closed groups are just the opposite and cannot be searched and you cannot add yourself to that group. When you have a dispatch group, you can assign initiators and

receivers both. For instance, you may have 25 people in your organization with 2 maintenance people. You can set up a group with all 25 people in it. You would set both maintenance people as originators and receivers and everyone else as only initiators. This way, anyone in that group can call “Maintenance”, but only the 2 maintenance people will hear the call. When they respond, only the person that initiated the call will hear their response.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 4 – Managing Groups**

Pre-Configured Messaging

Pre-configured messages are common messages that are sent repeatedly by users. This is meant to increase efficiency so the user doesn’t have to type the same message over and over. You can either program a message that a user can just select and send or, you can customize the message to have variable inputs within a message. For example, “Clean up on Aisle <variable>”. The user can select this message and only have to type in the Aisle number. One thing to note, pre-configured messages are configured within a specific group and cannot be used in ad-hoc groups or one-to-one messages.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 4 – Assign a Preconfigured Message Template to a Group**
- **Chapter 5 – Create a Pre-Configured Group Message Template**

Feature Keys

Feature Keys are where you control which features each user has, as well as, the control over those features. Certain features, such as location and messaging, are easy to determine on whether you want to give those to users. The management features are the ones that need some thought. Do you want the users to control the ability to add and delete users as well as groups? Also, do you want them to control the settings on the way the device reacts while in a call. It is common to give managers a little more control and lock down the staff users so it doesn’t become work for the administrator if the users change something they shouldn’t.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 3 – Managing Users – User Settings – Supported Feature Keys**

Client Settings

Client settings are where you control the user experience while using WFC PTT Pro. You can control how they initiate a PTT Call, what notifications they receive and how they receive those notifications. This is also where you control the headset and speaker settings. You can allow or disallow a user to control these settings within the feature keys by changing the management feature “Show Settings Menu”. If

you leave this feature turned on in the “Feature Keys”, you can control in the “Client Settings”, feature by feature, those settings that a user sees by changing the “Display On Phone” setting next to that specific setting.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 3 – Managing Users – User Settings – Edit Client Settings**

Templates

Another one of the popular questions is, “Is there a way I can configure a group of users to have the same features or settings without going into each one individually?”. Setting up templates are the way to accomplish this. You set up specific templates for Feature Keys or Client Settings and then add the users to those specific templates. Keep in mind that a user can only be a part of one Feature Key and One Client Settings template. If a user is part of that template, you can’t give the user additional features or settings outside of the template. The template becomes the rule. Another thing to keep in mind is there are two levels of templates – Customer Level Templates and Department Level Templates. If you have multiple departments with similar configurations, a customer level template would be preferred. This way you can set on one template and add users regardless of the department that they are in. If you have a department that is different from the others, then the department level template would apply here.

Reference: **Zebra PTT Pro Management Portal Administrator Guide**

- **Chapter 5 – Managing Templates**

Appendix – Onboarding Examples

ABC Manufacturing

ABC Manufacturing is a one location facility of about 100 employees of which 19 of them are using WFC PTT Pro. The devices are for Supervisors, Leads, Warehouse, and certain office personnel. They have 11 Zebra TC-70s and the other 8 devices are cell phones. The TC-70s are shared role based devices (Supervisors, Leads, and Shipping/Receiving) and the cell phones are dedicated to the user.

Departments

So, let's start off with departments. Since it is only one location and not very many employees, it would make sense to set up one department for all users. Name the department what makes sense, usually either the company name or location is used.

Users

From there, it is time to onboard the users. For the dedicated users, I am going to use Firstname.Lastname. For the role based users, I will use the role, or a combination of the role and the area that they oversee. One thing to keep in mind is the user name needs to be unique across the server they are on. Sometimes adding a company prefix or suffix is needed to do so. Since this is a small organization, having all users show up as contacts on all other user's devices is not a problem. Set the "Maximal Contacts" flag to on or to "YES" if you are bulk loading the users.

John.Doe
Jane.Smith
Billy.Anderson
Sam.Johnson

Supervisor.1
Supervisor.2

Lead.Line1
Lead.Line2
Lead.Line3
Lead.Line4

Shipping.ABC
Receiving.ABC

Groups

Groups are next. The customer wants 3 groups: Supervisors, Leads, and All.Staff. The groups Supervisors & Leads will be set up as dispatch groups. For example, in the Supervisor group, everyone will be set up as originators, and only Supervisor.1 and Supervisor.2 will be set up as receivers. This way, when someone calls this group, only the Supervisors will hear the call. When either of the supervisors respond, only the calling party will hear the response. The Lead Group will be set up the same way. For the All.Staff group, it will be set up as a closed group. The members in a closed group must be managed

from the portal. Users may not come and go from this group. When anyone of the members call this group, everyone in the group hears the call and everyone hears the response. Closed groups are the most common type of groups.

Feature Key and Client Setting Templates

Now that I have the users and groups set up, I am going to create a couple of templates for features and settings. The features template will be basic. I don't want the shop floor users to sign out of their device while they are working, nor do I want them to change the settings on their device. So, the two features I will turn off are "Allow Activation" and "Show Settings Menu". In this particular instance, the named users are office users that are on their personal devices and will not be set up the same way as the shop floor users. The only users that will be added to this particular template are the role based shop floor users. As for the settings template, there will be only one change to the default. On the Call tab, most people prefer to press the PTT button once to start talking and then press it again to stop talking. This is instead of holding down the PTT button the whole time while talking. So, I am going to turn on the setting "Tap to Toggle PTT". I will add all users to this template since everyone prefers this method.

Now that the everything has been configured in the portal, it is time to input the activation codes in to the appropriate devices and get started using Workforce Connect PTT Pro.

John's Gas and Stuff

John's Gas and Stuff is a gas station and convenience store rolled into one. They have about 30 stores over 3 states. They have a set of field techs that service those stores. Each of the three states has a service hub where the field techs are based, about 10 field techs per location. Each service hub has 2 managers that schedule and route the techs. The devices they are using are company sponsored cell phones (Samsung Galaxy s7). They run 2 shifts during the week. Any service work that needs to be done on the weekend is handled by a third-party contractor.

Here is one way to look at onboarding for this customer.

Departments

I would set up three separate departments. I would name the departments after the state they are located in or if there was a service hub name or number, you could use that as well. For this use case, I will use the states.

Departments

- Minnesota
- Wisconsin
- Iowa

Users

As for the users, since all the field techs are carrying their own company cell phone (dedicated device), I will set them up by Firstname.Lastname, within the department (State) that they are based in. Since the

techs from the same state (department) often talk with each other, we will set the Maximal Contacts flag to on so all users within each department (state) will show up on each other's phone.

Minnesota

- John.Doe1 (FS Techs)
- John.Doe2
- John.Doe3
- John.Doe4
- John.Doe5
- John.Doe6
- John.Doe7
- John.Doe8
- John.Doe9
- John.Doe10
- Bill.Smith1 (Managers)
- Bill.Smith2

I would follow suit for the other 2 states, Wisconsin and Iowa.

Groups

Now it's time to define groups. John's Gas and Stuff techs do not all have the same skill sets. There is specific training they go through to work on Gas Pumps and the POS system used at the register. There are times that a manager may need to talk with those people in particular so, we will set up specific groups for those skilled techs; one for Gas Pumps, and one for the POS system. They also have designated first shift techs and second shift techs. I will also set up an all users group that will be used mainly for messaging. Since all employees are not working at the same time, it probably won't be used too often for an all call group.

Groups

- Gas.Pump.Techs.1
- Gas.Pump.Techs.2
- POS.System.Techs.1
- POS.System.Techs.2
- First.Shift.Techs
- Second.Shift.Techs
- All.Users

I would set up the Gas Pump & POS System groups as dispatch groups and the other three groups as closed groups. After the groups are set up, you can add the appropriate users to each group. Within the dispatch groups, the techs that have those specific credentials, would be set up as initiators and receivers and everyone else would be set up as initiators only. The reason we are setting up the other

groups up as closed groups is we don't want the users to be able to come and go from these groups. They will be administered from the portal. When setting up groups, it is important to talk with the employees to find out who needs to talk with who. They are the people who will know best. It is not uncommon to get it set up and have the customer come back with some changes to tweak the configuration.

Feature Key and Client Setting Templates

When we set up templates for this customer, not all users will be part of the templates. We are going to keep the managers with the default settings. They are trusted employees and there is no concern for messing anything up. We are going to create Feature Keys template and a Client Settings template for the service techs. For the Feature Keys, we are going to turn off the features "Allow Contact Management", "Allow Group Management", and "Allow Deactivation". Since each person's contact and group list are pretty small, there really is no reason to allow the users to change their lists.

Regarding Location Features, first, we are going to turn on "Force Duty Mode". This allows the employee to turn off location tracking when he is not working and turn it on when they are. Although, if the employee makes or receives a PTT Call, Duty Mode is turned back on and location tracking is enabled again. With that being said, if the employee forgets to turn it on, it will be turned on the first time they make or receive a call. For the historical location settings, we are going to set the "Tracking Sample Period" to 3 minutes and the "Tracking Report Period" to 5 minutes. These settings are not going to be consistent across different organizations. One thing to keep in mind is how mobile is the employee. Do you need to know where the employee is every 30 seconds, minute, 5 minutes? The more aggressive the capture, the more drain there is going to be on the battery. This make take some massaging to get it where the customer wants it.

For the Client Settings, there won't be too much to change from the defaults. First, since the drivers will be using Bluetooth headsets, on the "Integration Tab" we want to turn on "Allow Bluetooth". Also on the "Integration Tab", we are going to change the "Display Name" from "username" to "First Name Last Name". This is very similar to the user name for this organization, but they want the display to not show the period between their first name and last name on the contact list. Lastly, we just want to verify on the "Notification Tab" that the "Foreground App on Incoming Call" setting is turned on. Since there is no side PTT Button on consumer devices, the employee will not be able to communicate unless the employee can push the PTT button with the app displayed on the screen.

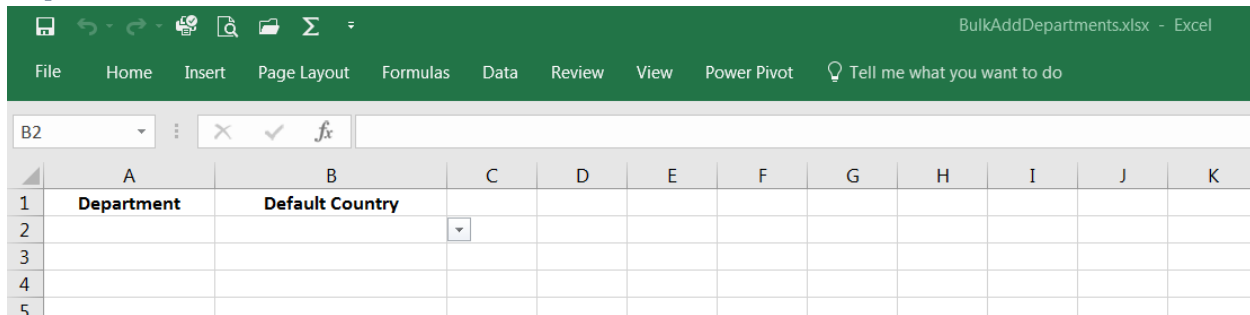
Now that the everything has been configured in the portal, it is time to input the activation codes in to the appropriate devices and get started using Workforce Connect PTT Pro.

Other Onboarding Considerations

One thing that was not brought up in the above two examples is: “What do I do when there are many users?”. Many is a relative term and in this case, means, more than I want to manually want to create. In these cases, we will resort to bulk importing. You can bulk import Departments, Users, Groups, Group Members, and User Contacts. For all items that can be bulk imported, the process will be the same.

1. Download the Bulk <subject> template. It will be an Excel Spreadsheet (.xlsx)
2. Open the spreadsheet and fill in the information.
3. Once you are completed with entry, save the file as a .csv
4. Return to the Admin Portal and click on the button titled “Bulk Add <Subject>”.
5. Find where you saved the .csv file on your computer
6. Click on the file
7. Click on Open
8. Follow the prompts

Departments

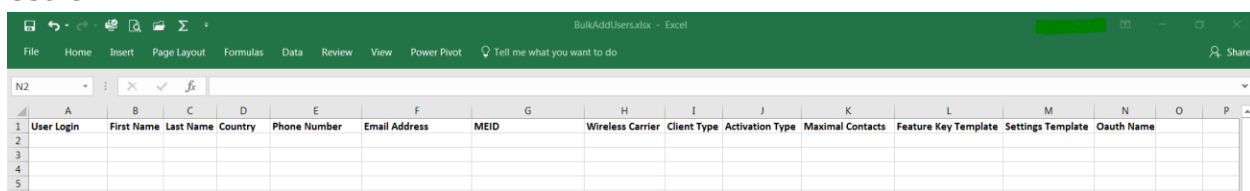


	A	B	C	D	E	F	G	H	I	J	K
1	Department	Default Country									
2											
3											
4											
5											

This template includes the following fields:

- **Department Name** – Enter a unique department name identifying the department within the enterprise. The name must be made up of letters, numbers, and “.”s, and between 3-25 characters long.
- **Default Country** – Select the default country for this department from the drop-down list. This allows for the correct formatting of international phone numbers.

Users



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	User Login	First Name	Last Name	Country	Phone Number	Email Address	MEID	Wireless Carrier	Client Type	Activation Type	Maximal Contacts	Feature Key Template	Settings Template	Oauth Name		
2																
3																
4																
5																

The template includes the following fields:

- **User Login** - Enter a unique user name identifying the user in the enterprise. The name must be made up of letters, numbers, and “.”s, and between 3-16 characters long. Examples are John.Smith or Bus.57.

- **First Name** - Enter the user's first name. This must be at least one character and can contain letters or numbers.
- **Last Name** - Enter the user's last name. This must be at least three characters and can contain letters or numbers.
- **Country** – Select from the dropdown list the two-character country code for this user. This code will select the correct format for the phone number for that country.
- **Phone Number / Email Address** - Populate at least one of these fields. Activation messages are delivered based on these fields. If you populate both fields, the user receives both an SMS and email activation message.

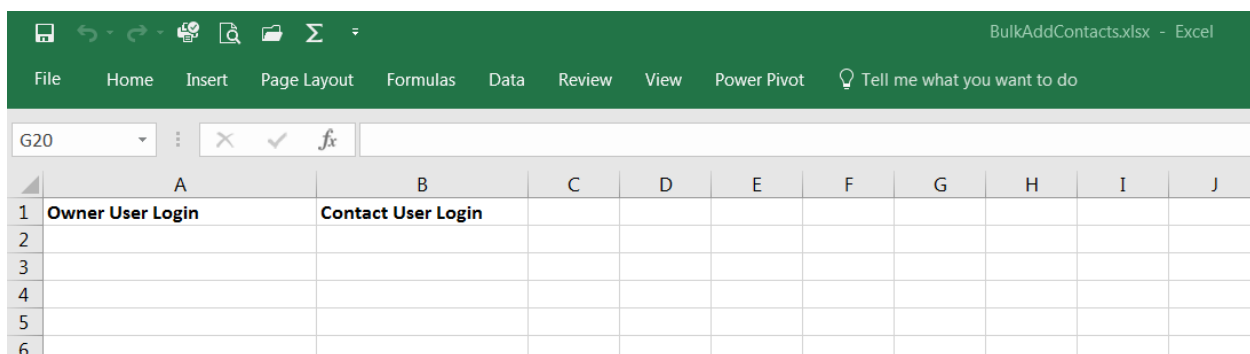
The following fields use a drop-down menu for selection:

- **Wireless Carrier** - Select the carrier for the user, required for addressing the activation SMS.
- **Client Type** - Select the client type for the user. Options are **Android**, **iOS**, **Dispatch PC**, and **Radio Gateway**.
- **Activation Type** - Select **Activation Code** for immediate activation upon upload, **Inactive** for manual or bulk activation later.
- **Maximal Contacts** - Select **Yes** to add all department members to the new user's contact list and to include the new user in all department members' contact lists. Select **No** to not change any contact lists.

The following fields are optional:

- **Feature Key Template** - To assign an existing Feature Key Template to the new user, enter the name of the template.
- **Settings Template** – To assign an existing Settings template to the new users, enter the name of the template.
- **OAuth Name** – Specify the OAuth name, including domain, only if using OAuth integration

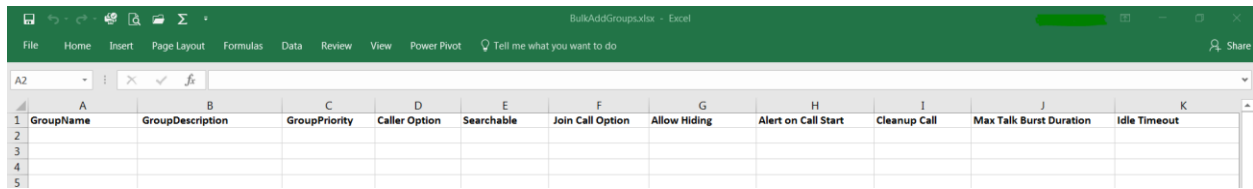
Contacts



	A	B	C	D	E	F	G	H	I	J
1	Owner User Login	Contact User Login								
2										
3										
4										
5										
6										

- **Owner User Login** – Enter the User Login of the existing person you wish to add contacts to
- **Contact User Login** – Enter the User Login of the existing person you wish to add as a contact to the person you added in the first column.

Groups



	A	B	C	D	E	F	G	H	I	J	K
	GroupName	GroupDescription	GroupPriority	Caller Option	Searchable	Join Call Option	Allow Hiding	Alert on Call Start	Cleanup Call	Max Talk Burst Duration	Idle Timeout
1											
2											
3											
4											
5											

The template includes the following fields:

- **Group Name** - Enter a unique group name identifying the group in the enterprise.
- **Group Description** - Enter a description for the group.
- **Group Priority** - Set the group priority to value 0 (lowest) and 5 (highest).
- **Caller Option** - Defines who is allowed to start the call.
 - Member
 - Anyone
- **Searchable** – Yes or No - When enabled, enterprise users can search for this group from their client and, if not included in the initial membership list, can add themselves to the group.
- **Join Call Option** – Yes or No - The **Join Call** option controls the ability to late join a call. If enabled, other members of the group can join the call after the start (drop/join or late join). If disabled, other members cannot late join or rejoin the call. **Alert on Call Start** must be enabled for the **Join Call** option to be available.
- **Allow Hiding** – Yes or No - When enabled, members can hide this group in their group list.
- **Alert on Call Start** - Yes or No - Locked to enabled unless the **Cleanup Call** option is set to **Without Initiator** or **With zero active Members**. Otherwise, it is locked to disabled.
- **Cleanup Call** - Defines when the group call is terminated based on participating members.
- **Max Talk Burst Duration** - Defines how long a talker can hold the floor. This option does not apply to Unicast groups.
- **Idle Timeout** - Defines when the group call is terminated based on how long the call has been idle.

Group Members

BulkAddGroupMembers.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Power Pivot Tell me what you want to do

Q31

	A	B	C	D	E	F	G	H
1	GroupName	UserLogin	Initiate Calls	Receive Calls	Talker Override			
2								
3								
4								
5								
6								

- **Group Name** - Enter the name of an existing group
- **User Login** – Enter the User Login of an existing person you wish to add to the group
- **Initiate Calls** – Yes or No - The user can create calls to this group.
- **Receive Calls** – Yes or No - The user can receive calls from this group.
- **Talker Override** – Yes or No - The user can take the floor from another user. If the current speaker also has **Talker Override**, the floor cannot be taken from them.

Zebra Workforce Connect PTT Pro Support Location

Zebra Support – Quick Start Guides, User Guides, Admin Portal Guides

<https://www.zebra.com/us/en/support-downloads/software/productivity-apps/push-to-talk-pro.html>