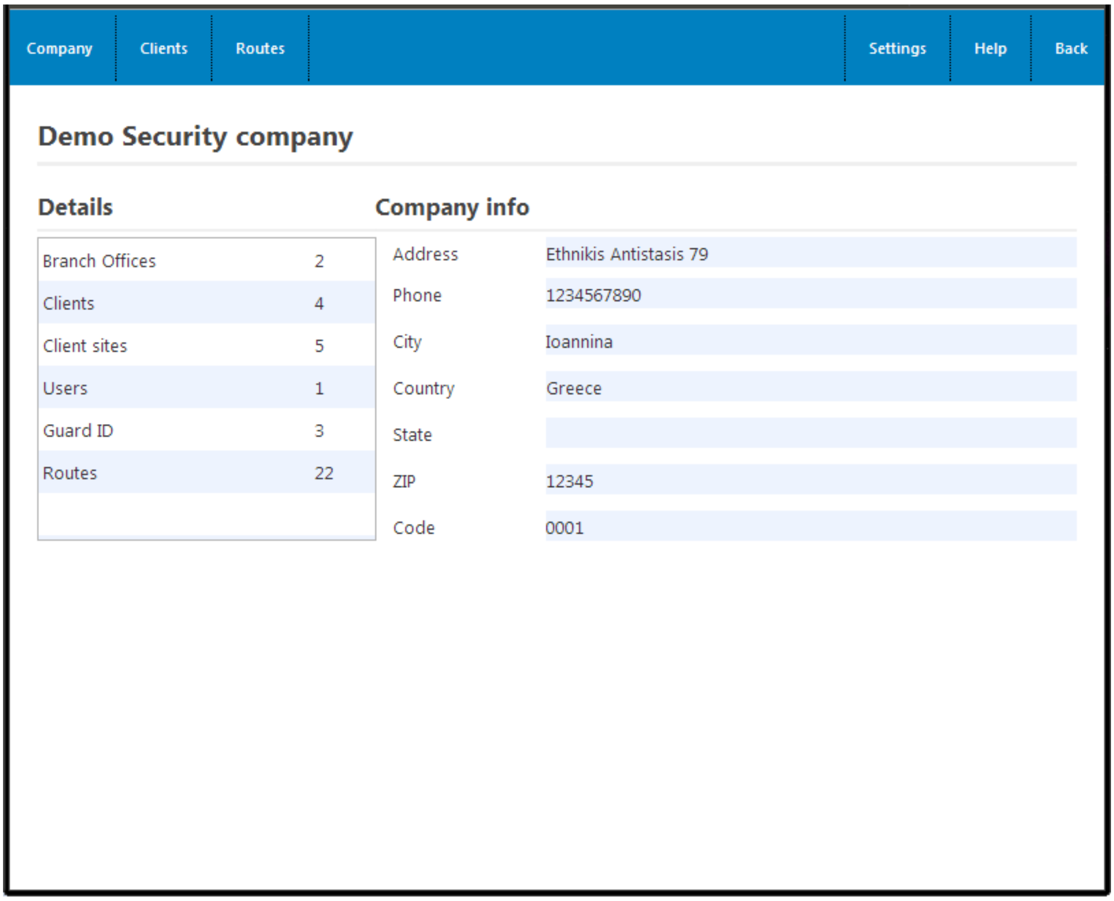
QRPatrol
Advanced patrol utilities
Usage Manual

Last updated: March 1, 2014
Manual ver: 1.0
Application ver: 1.4.2

Contents

First look

When you connect through your browser, the image below is what welcomes you to the application



At the top we can see the main **toolbar** of the application with various menus.

Below the toolbar is the main area of the application, in which various panels (*or tabs if you prefer*) will be shown when interacting with the toolbar menus

Security company

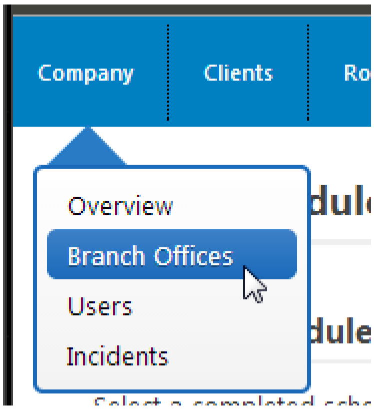
The security company is the foundation of the **QRPatrol Advanced patrol utilities** application. Without it you cannot use the application.

For information on how to set up your own security company for the advanced patrol utilities application, please visit http://www.kerveroslive.com or send an email to:

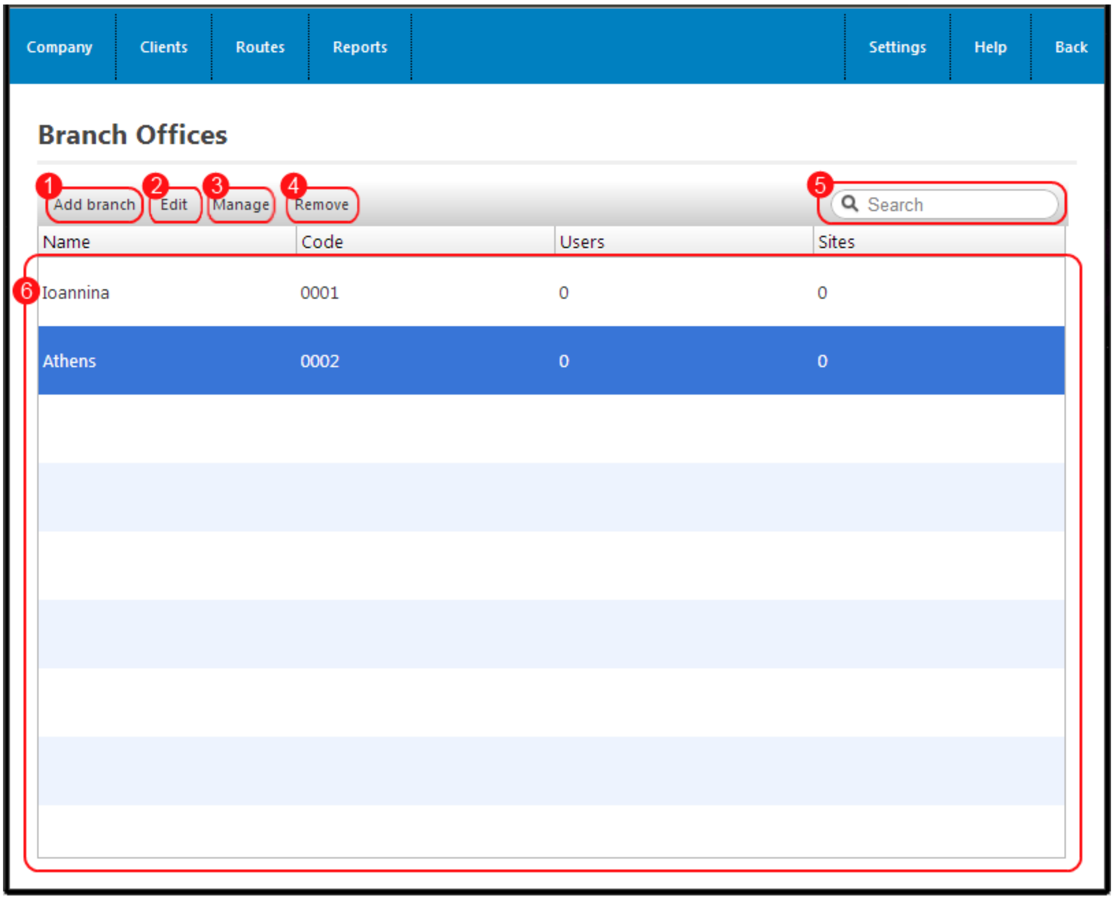
When you first enter the application, you're automatically being shown the default panel (*Company → Overview*), which shows some basic information and details concerning your security company.

Branch offices

You can access your company's branch offices panel by clicking on the top left "*Company*" → "*Branch Offices*" as shown below:



The panel is shown below:

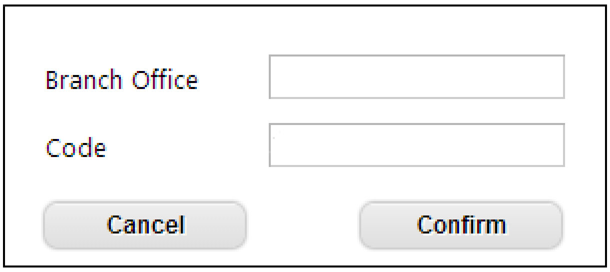


The panel is composed by a grey toolbar of actions and a list of your security company's branch offices (*6*).

Note: Actions like “Edit” (*2*), “Manage” (*3*) and “Remove” (4) are disabled by default. The reason is that you have to select one branch office from the list (*6*) before continuing with the above actions.

Adding a new branch office

By clicking “Add branch” (1) a new popup dialog (as shown below) will come up.



You have to provide:

- A unique name for the new branch office
- A code for the new branch

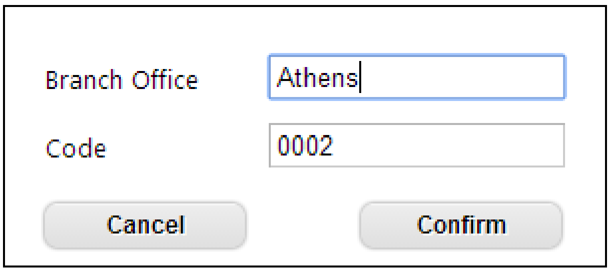
Note: Codes between branches aren’t unique; it’s up to you to manage them the way you like.

After completing the addition, the newly created branch office should appear in the list of branch offices (*6*).

Editing an existing branch office

To edit a branch office you have to first select one from the list of your company’s branch offices (6).

After selecting from the list, you can click on “Edit” (*2*), which in turn will bring front a popup similar to the one of adding a branch office:



As with adding a branch office you can edit:

- The name of an existing branch office

- The code of an existing branch office

Note: Codes between branches aren't unique; it's up to you to manage them the way you like.

If you confirmed the changes, they should be reflected in the list of branch offices (*6*).

Removing an existing branch office

To remove a branch office you have to first select one from the list of your company's branch offices (6).

After selecting from the list, you can click on "Remove" (*4*), which in turn will bring front a confirmation popup, if you confirm the removal, the branch office should disappear from the list of branch offices (6).

Searching in your branch offices

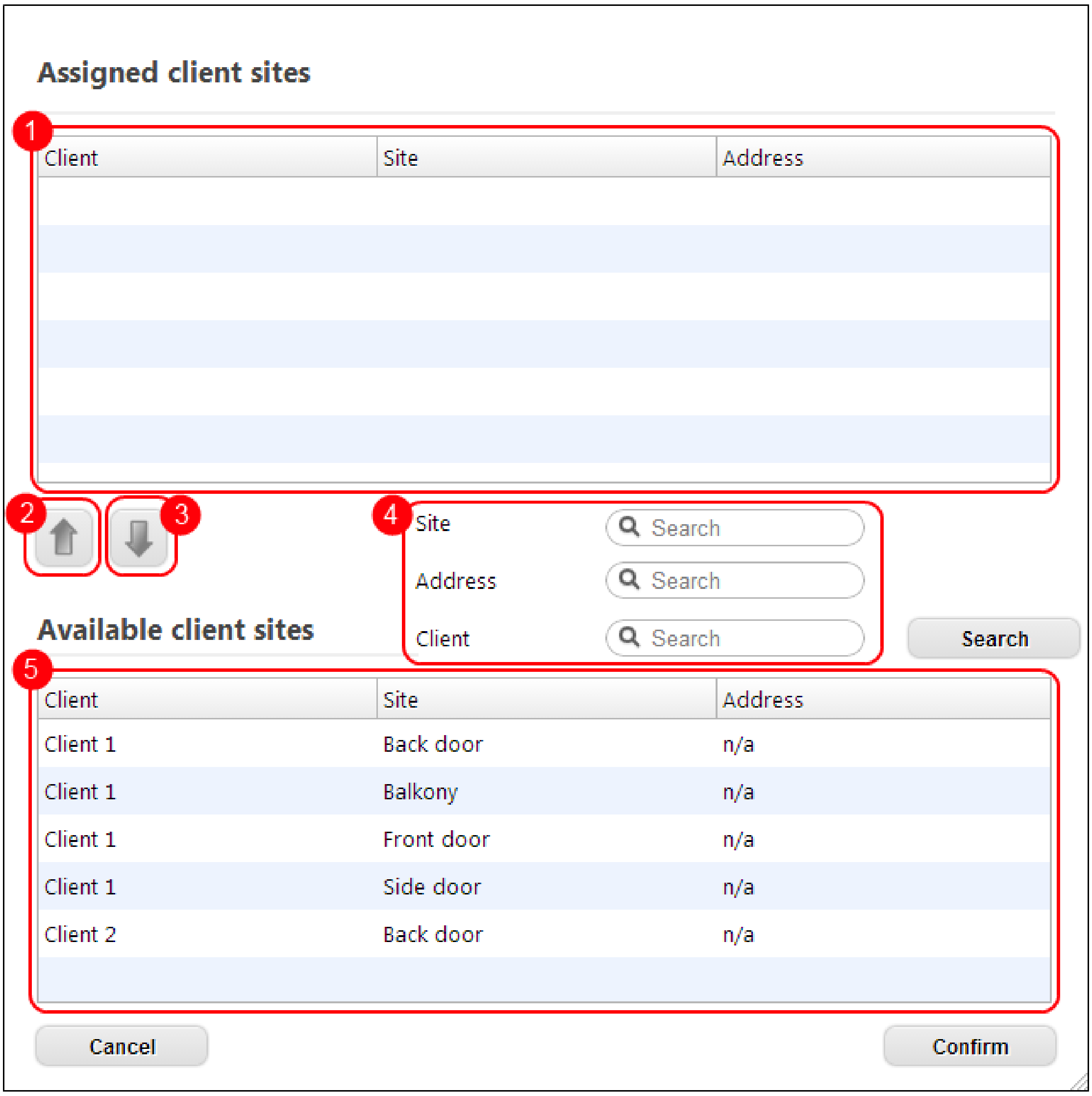
If you want to search your branch offices, you can type a sequence of characters in the search field (*5*) and the press the "ENTER" key on your keyboard. The results of your search will appear in the list (*6*).

Note: The results of your search will be branch offices whose **names** *contain* **the sequence of characters** you typed in the search field (*5*). In other words the search is by **name**.

Managing an existing branch office

To manage a branch office you have to first select one from the list of your company’s branch offices (6).

After selecting from the list, you can click on “Manage” (*2*), which in turn will bring front the popup below:



By clicking the “Assign” button (*1*) you’re presented another popup dialog like the one below:

You can see two **distinct lists**, one of the **assigned client sites** (*1*) and one of the **available client sites** (*5*).

You can also see two **buttons** (2) & (*3*), which are used for **assigning** and **removing** client sites respectively.

Lastly you can see three **filters** (*4*) that can be applied to the list of available client sites (*2*).

The assignment of client company sites to your branch serves many purposes. One of which is that you can know for any client site which branch office is responsible for patrolling it.

Note: In the near future there's a plan to add the feature of **security company users** who will have certain permissions/restrictions in the application, like having the ability to view only client sites of the branch office they belong to etc.

Assignment of a client site

To assign a client site to the selected branch office you have to:

1. Select one of the available client sites from the list (*5*).
   Note: The grey arrow pointing up (*2*) should have turned green
2. Press the green arrow button (*2*).

Notice that the client site disappeared from the list of available client sites (*5*) and appeared in the list of assigned client sites (*1*).

Note: Any changes to the client site assignments aren't applied until you actually confirm them by pressing the "Confirm" button on the down-right side of the dialog

Removing (unassigning) an assigned client site

To remove an assigned client site from the selected branch office you have to:

1. Select one of the assigned client sites from the list (*1*).
   Note: The grey arrow pointing down (3) should have turned red
2. Press the red arrow button (*3*).

Notice that the client site disappeared from the list of assigned client sites (*1*) and appeared in the list of available client sites (*5*).

Note: Any changes to the client site assignments aren't applied until you actually confirm them by pressing the "Confirm" button on the down-right side of the dialog

Searching/filtering available client sites list

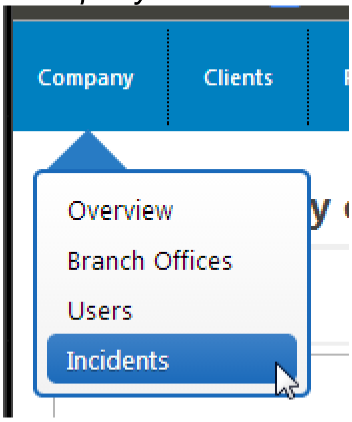
You can use three search fields/filters (*4*) for searching/filtering the list of available client sits (*5*).

All three of the search filters are applied simultaneously. This means that you can filter the available client sites by **client name**, **site name** and **address** at the same time.

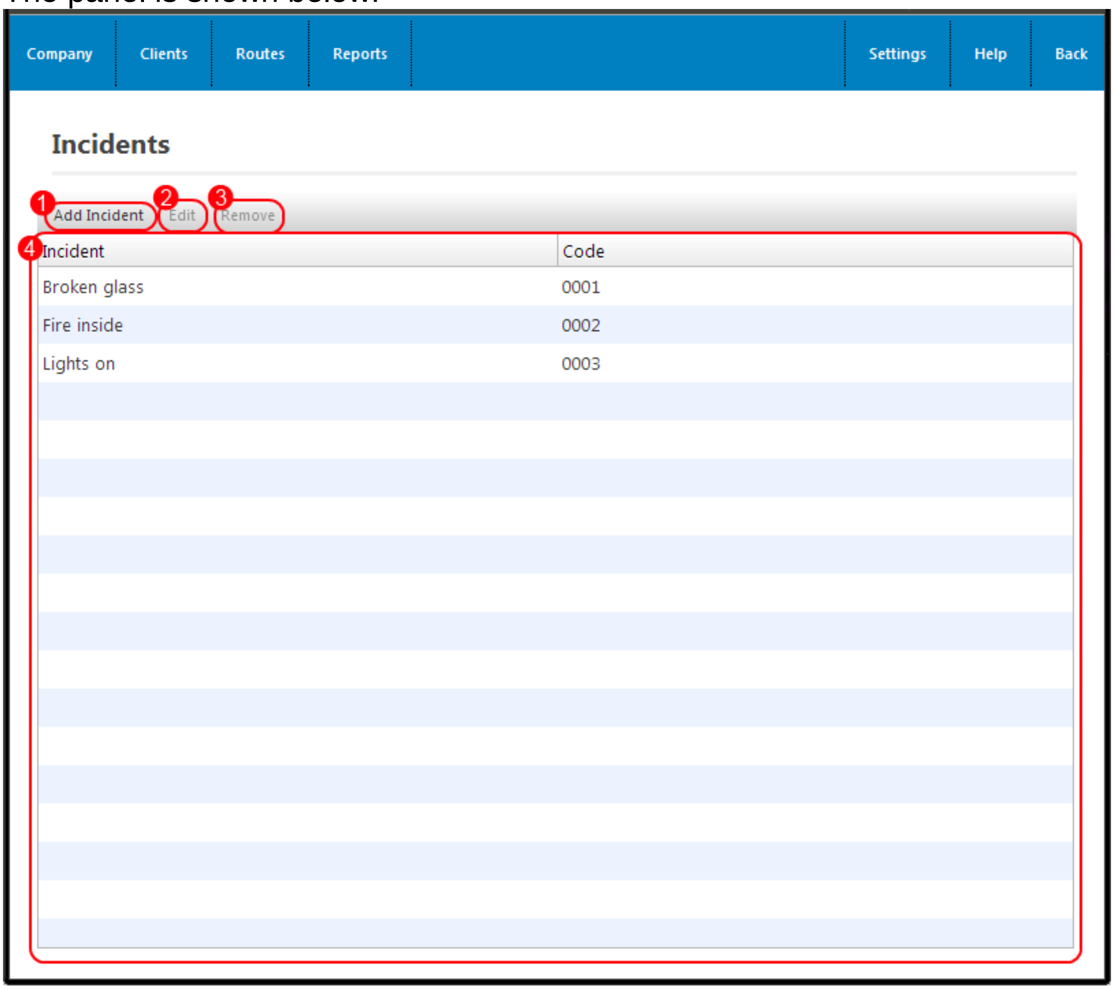
To apply your search filters, just press the “Search” button.

Incidents

You can access your company's incidents panel by clicking on the top left "*Company*" → "*Incidents*" as shown below:



The panel is shown below:

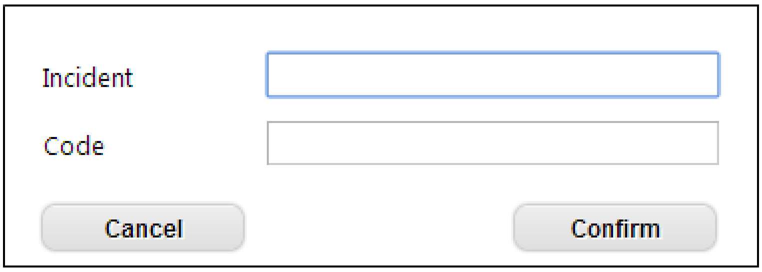


The panel is composed by a grey toolbar of actions and a list of your security company's incidents (4). This list (*4*) is being sent to each mobile device with a guard/reader ID that you have connected with you company. Any changes to this list (*4*) are also sent to each of your guard/reader IDs

Note: Actions like "Edit" (*2*) and "Remove" (*3*) are disabled by default. The reason is that you have to select one incident from the list (*4*) before continuing with the above actions.

Adding a new Incident

By clicking "Add Incident" (1) a new popup dialog (as shown below) will come up.



You have to provide:

- A unique name for the new Incident
- A unique code for the new Incident

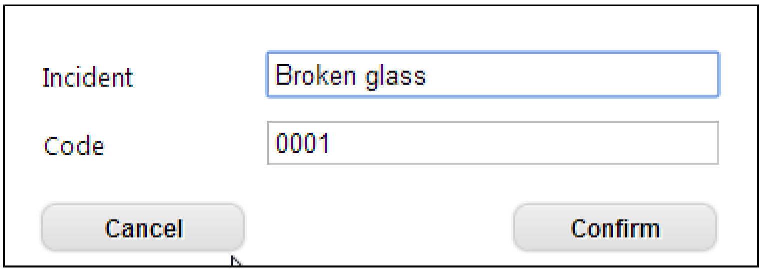
Important Note: Unlike branches, codes between Incidents are **unique**.

After completing the addition, the newly created Incident should appear in the list of Incidents (*4*).

Editing an existing Incident

To edit an Incident you have to first select one from the list of your company's Incident s (6).

After selecting from the list, you can click on "Edit" (*2*), which in turn will bring front a popup similar to the one of adding an Incident:



As with adding a new Incident you can edit:

- The name of an existing Incident
- The code of an existing Incident

Important Note: Unlike branches, codes between Incidents are **unique**.

If you confirmed the changes, they should be reflected in the list of branch offices (*4*).

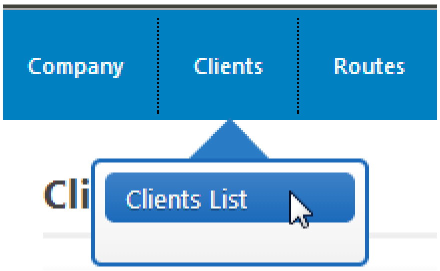
Removing an existing Incident

To remove an Incident you have to first select one from the list of your company's Incidents (*4*).

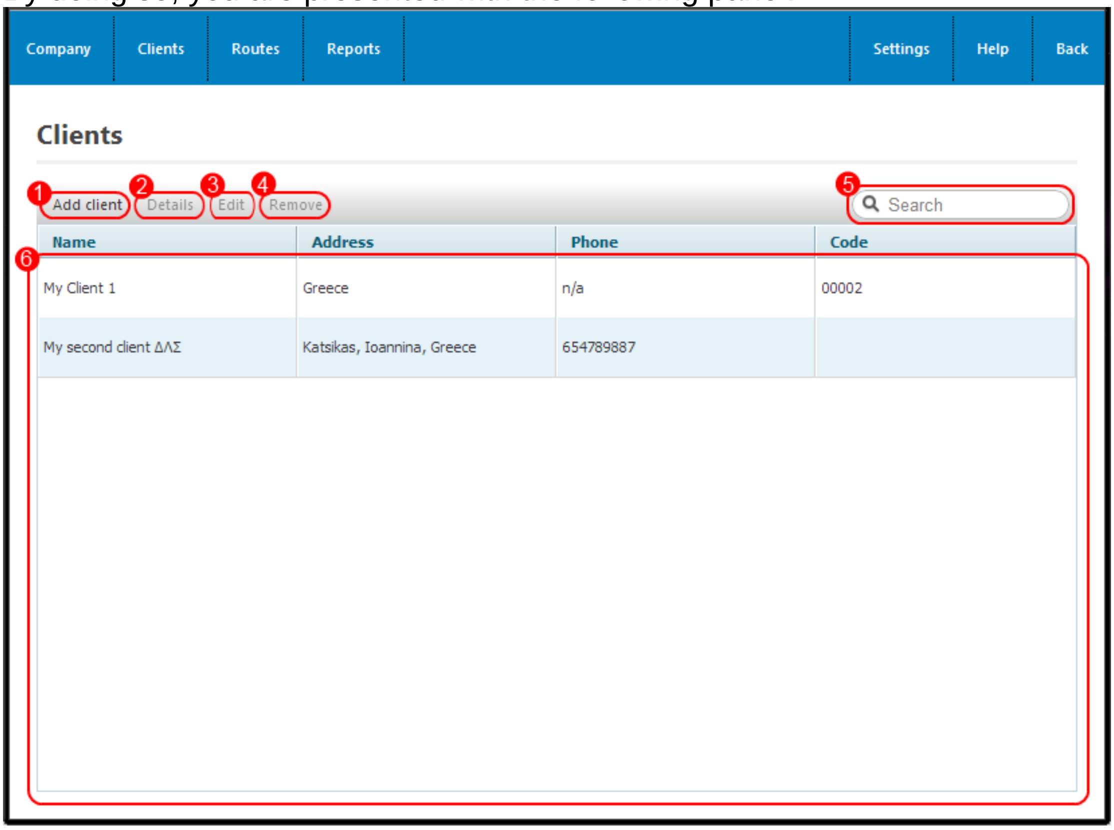
After selecting from the list, you can click on "Remove" (*3*), which in turn will bring front a confirmation popup, if you confirm the removal, the Incident should disappear from the list of Incidents (*4*).

Client companies

You can access your company clients' panel by clicking on the "*Clients"* → "*Clients List*" as shown below:



By doing so, you are presented with the following panel:

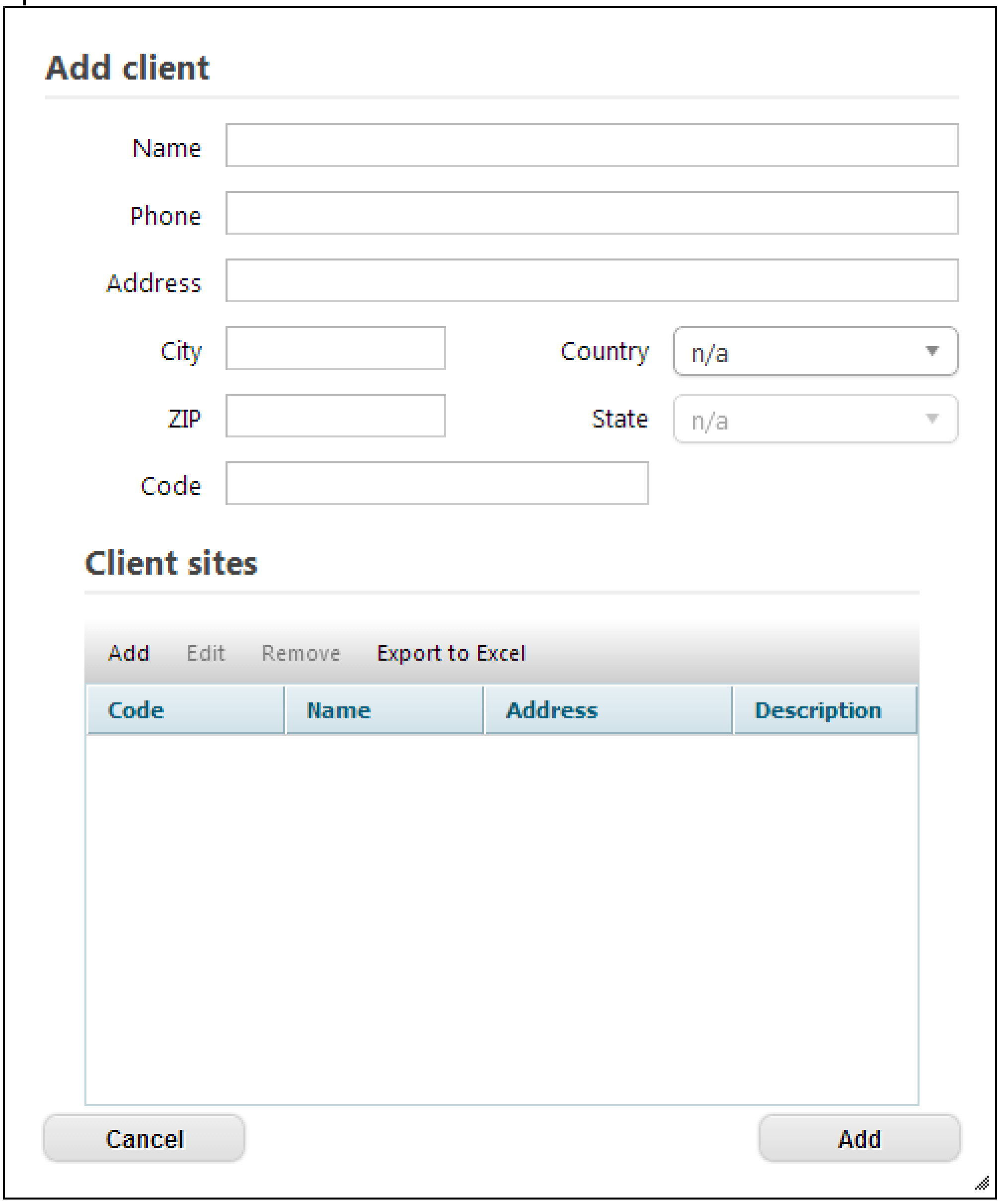


The panel is composed by a grey toolbar of actions and a list of your security company's clients (*6*).

Note: Actions like "Details" (*2*), "Edit" (*3*) and "Remove" (4) are disabled by default. The reason is that you have to select one client from the list (*6*) before continuing with the above actions.

Adding a new client

By clicking "Add client" (1) a new popup dialog (as shown below) will come up.



Note: You are **required** to provide a unique name for the new client.
Codes between your clients aren't unique; it's up to you to manage them the way you like.

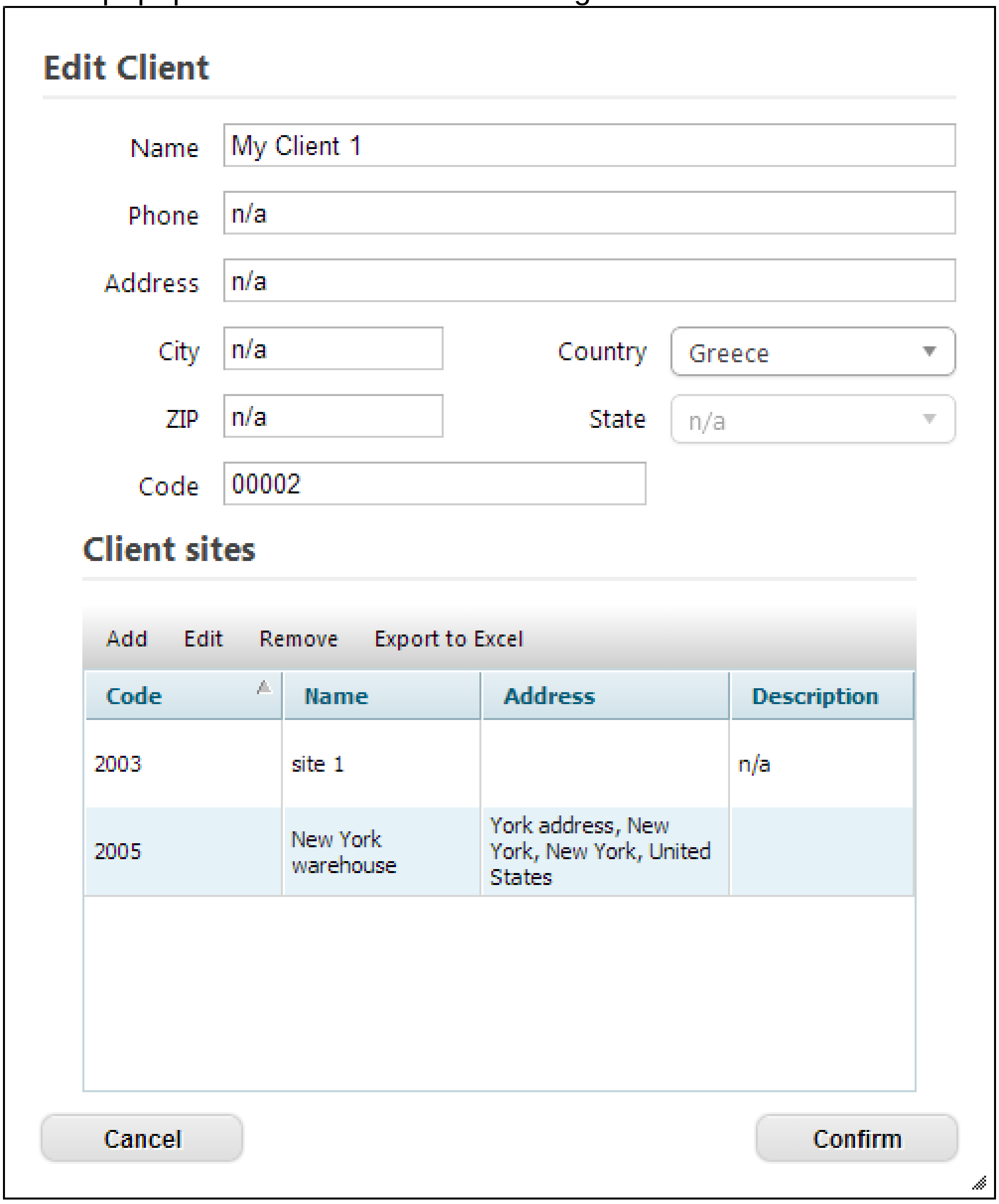
Note: ***Adding***, ***editing*** and ***removing*** client sites is explained further along this document

After completing the addition, the newly created client should appear in the list of your company's clients (*6*).

Editing an existing client

To edit one of your clients you have to first select one from the list of your company's clients (6).

After selecting from the list, you can click on "Edit" (*3*), which in turn will bring front a popup similar to the one for adding a new client:



Note: As with adding a new client you are required to always provide a unique name. Codes between your clients aren't unique; it's up to you to manage them the way you like.

Note: ***Adding***, ***editing*** and ***removing*** client sites is explained further along this document

If you confirmed the changes, they should be reflected in the list of your company's clients (*6*).

Removing an existing client

To remove one of your clients you have to first select one from the list of your company's clients (6).

After selecting from the list, you can click on "Remove" (*4*), which in turn will bring front a confirmation popup, if you confirm the removal, the selected client should disappear from the list of company's clients (6).

Searching in your clients list

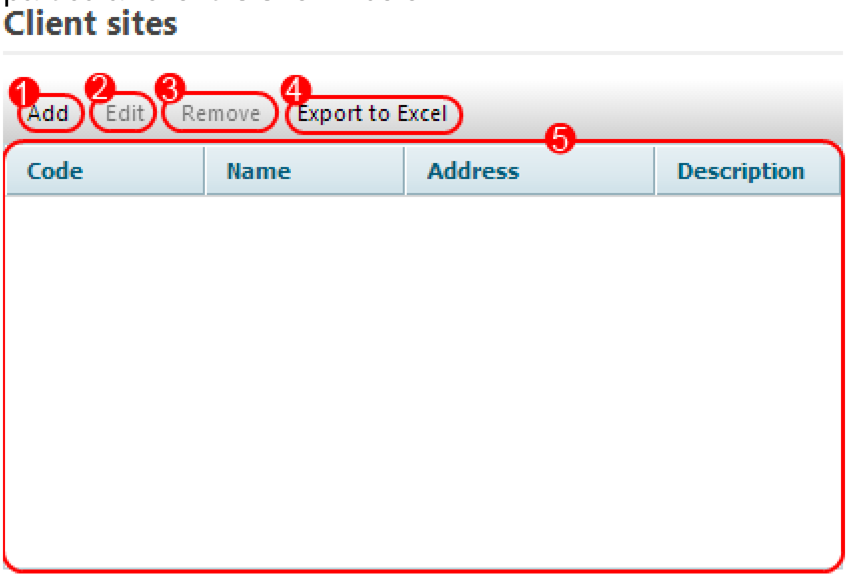
If you want to search your clients list, you can type a sequence of characters in the search field (*5*) and the press the "ENTER" key on your keyboard. The results of your search will appear in the list (*6*).

Note: The results of your search will be clients whose **names** *contain* **the sequence of characters** you typed in the search field (*5*). In other words the search is by **client name**.

Client company Sites

Each one of your company's clients can have more than many sites (*client company sites*). A client's site usually represents an actual place at your client's property (*back door, front door etc.*), however you are free to define them anyway that suits your needs.

The basic layout for adding/editing/removing client company sites to one particular client is shown below:



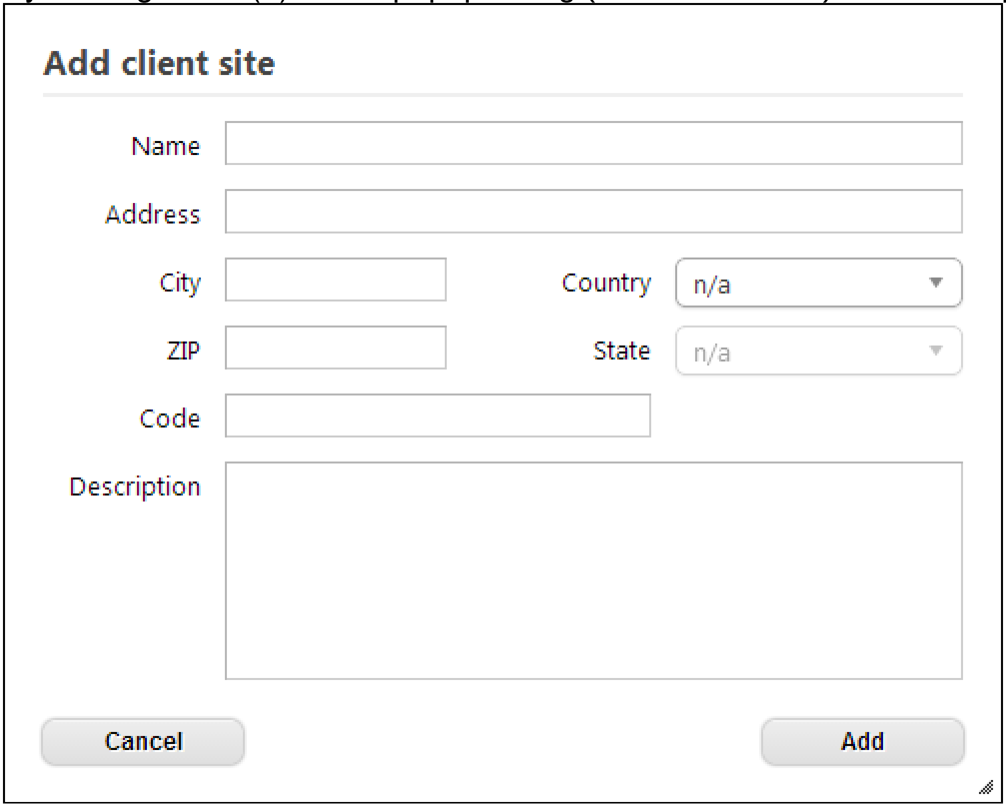
You can access this layout when **Adding** a new client or **Editing** an existing client.

The layout is composed by a grey toolbar of actions and a list of client sites belonging to the selected client (*5*). Obviously when adding a new client, the list will be initially empty.

Note: Actions like "Edit" (*2*) and "Remove" (3) are disabled by default. The reason is that you have to select one client site from the list (*5*) before continuing with the above actions.

Adding a new client site

By clicking “Add” (1) a new popup dialog (as shown below) will come up.



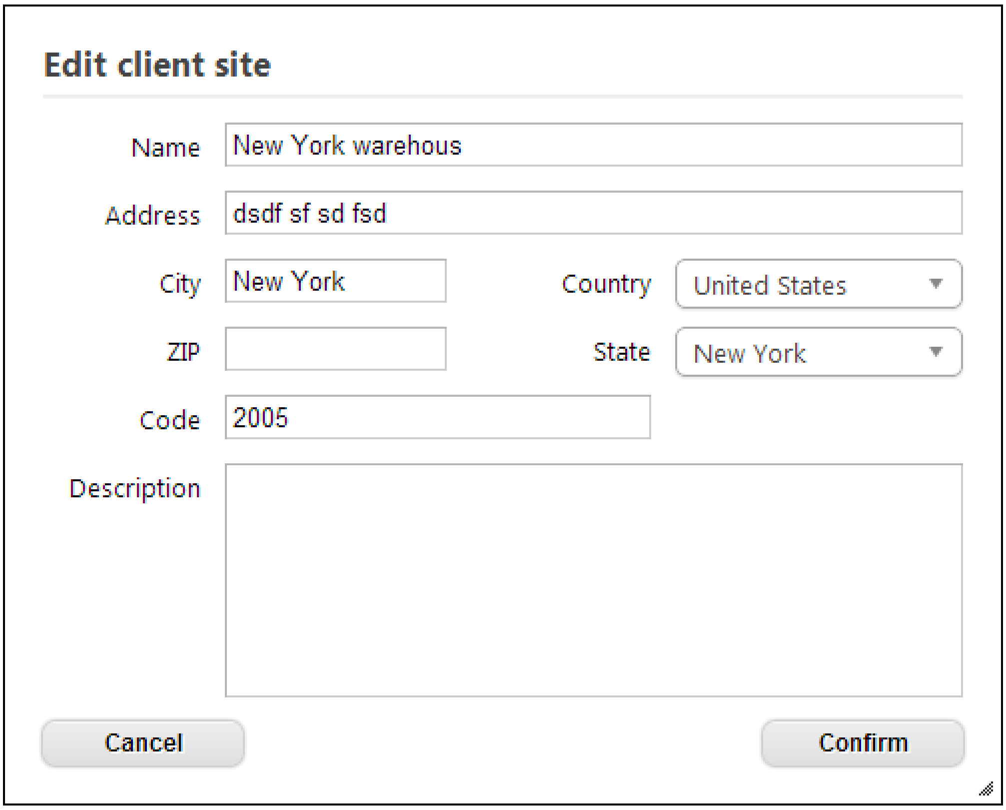
Note: You are **required** to provide a unique (for the selected client) name for the new client site.
Codes between your client sites aren’t unique; it’s up to you to manage them the way you like.

After completing the addition, the newly created client site should appear in the list of client sites (5).

Editing an existing client site

To edit one of the client sites you have to first select one from the list of client sites (5).

After selecting from the list, you can click on “Edit” (*2*), which in turn will bring front a popup similar to the one for adding a new client site:



Note: As with adding a new client site you are required to always provide a unique (for the selected client) name.
Codes between your client sites aren't unique; it's up to you to manage them the way you like.

If you confirmed the changes, they should be reflected in the list of client sites (5).

Removing an existing client site

To remove one of your clients you have to first select one from the list of client sites (5).

After selecting from the list, you can click on "Remove" (3), which in turn will bring front a confirmation popup, if you confirm the removal, the selected client site should disappear from the list of client sites (5).

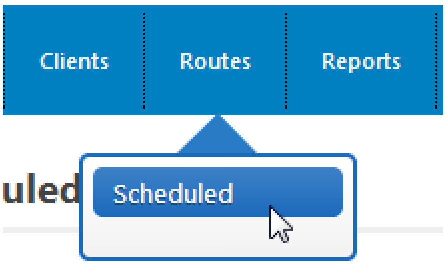
Exporting to excel

You can also **export** a particular client's sites to a file in excel (*.xlsx*) format. To do so simply click on "Export to Excel" (4) button and the excel file should be available to you for download.

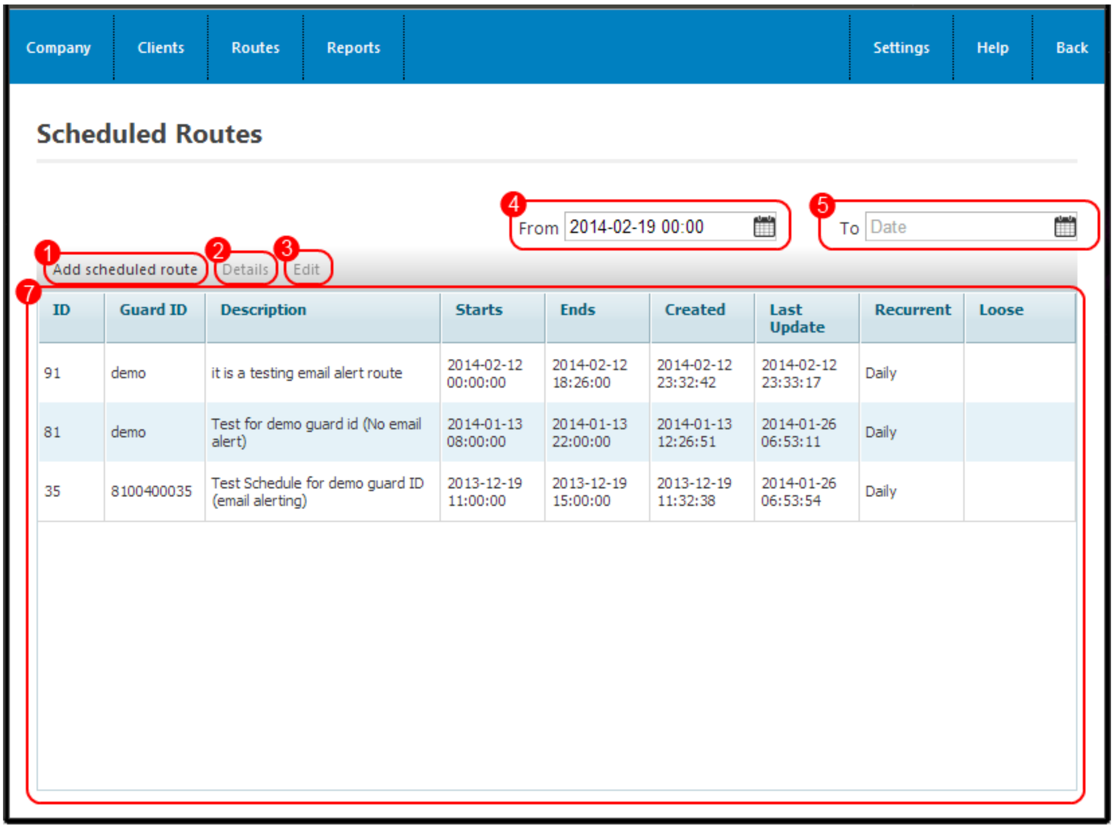
Scheduled routes

In **QRPatrol Advanced patrol utilities** you can define routes that can be scheduled and pushed to the QRPatrol Mobile application that your guards use. These schedule routes can be recurrent or not, with strict check time ranges or not or even completely loose.

You can access your company’s scheduled routes panel by clicking on the top toolbar “*Routes” → “Scheduled*” as shown below:



The panel is shown below:



The panel is composed by a grey toolbar of actions, a list of your security company’s scheduled routes (7) and two date filters (4)&(5).

Note: Actions like “Details” (*2*) and “Edit” (*3*) are disabled by default. The reason is that you have to select one scheduled route from the list (7) before continuing with the above actions.

Scheduled Routes basics

A scheduled route is defined from:

1. A **starting date** and time
2. An **ending date** and time
3. A set of **patrol points** (*checkpoints*)
4. If it's **loose** (*points check times don't matter*) or not
5. If it's **recurrent** and if yes, how often

A scheduled route can also have these additional informations:

1. Text description
2. Guard ID, if set the scheduled route will only accept point checks from the **selected guard**. If not set, the scheduled route will accept point checks from **all the guards** belonging to your security company

Loose scheduled routes:

A loose scheduled route is a route where the check times of each point inside the route **doesn't** matter. In a loose route, the only things that matter for it being considered a correct route are:

- its **start** date & time
- it's **end** date & time
- **the check order** of its points

While in a not loose (*strict*) route those things are:

- its **start** date & time
- it's **end** date & time
- **the check order** of its points
- **the check time** for each point in the route

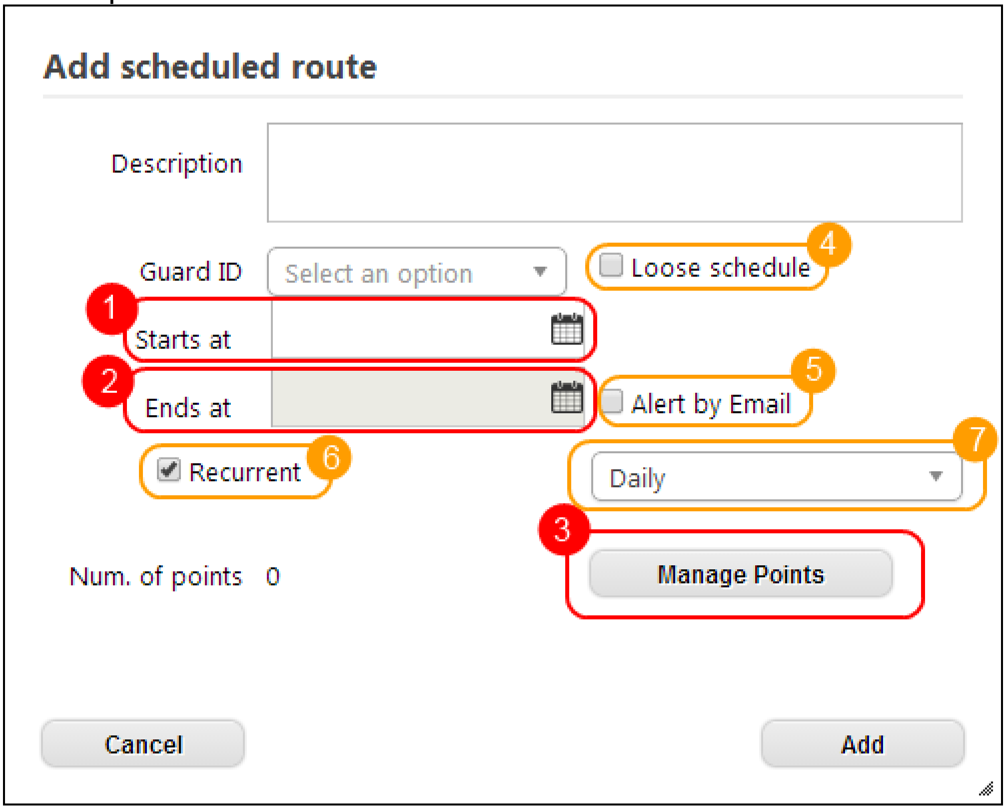
Recurrent scheduled routes:

A scheduled route can have a Daily, Weekly, Monthly or no recurrence.

- A scheduled route with **no recurrence** is active **only once.**
- A scheduled route with **daily recurrence** is active every day, between the time range specified by its ***start*** and ***end*** times
- A scheduled route with **weekly recurrence** is active every 7 days from its ***start*** date, between the time range specified by its ***start*** and ***end*** times
- A scheduled route with **monthly recurrence** is active every month the same day as the day of its ***start*** date, between the time range specified by its ***start*** and ***end*** times

Adding a new Scheduled route

By clicking "Add schedule route" (1) a new popup dialog (as shown below) will come up:



You **have to** provide:

- A start date for the scheduled route (*1*)
- If the scheduled route is a loose route you'll have to provide an end date (*2*)
- Add/Remove points in the new schedule by clicking the "*Manage Points"* button (*3*)

Note: By checking the "***Loose schedule***" (*4*) checkbox you specify that you want this scheduled route to be loose.

Note: By checking the "***Alert by Email***" (5) checkbox you specify that you want to be notified via e-mail when there's an **exception** in any of the points in this route. An exception in a route is raised when a point in a route is **not checked** or is checked, but **late** or **early** or **in a wrong order**

Note: By checking the "***Recurrent***" (*6*) checkbox you specify that you want this scheduled route to be recurrent. Available values of recurrence are:

- Daily
- Weekly
- Monthly

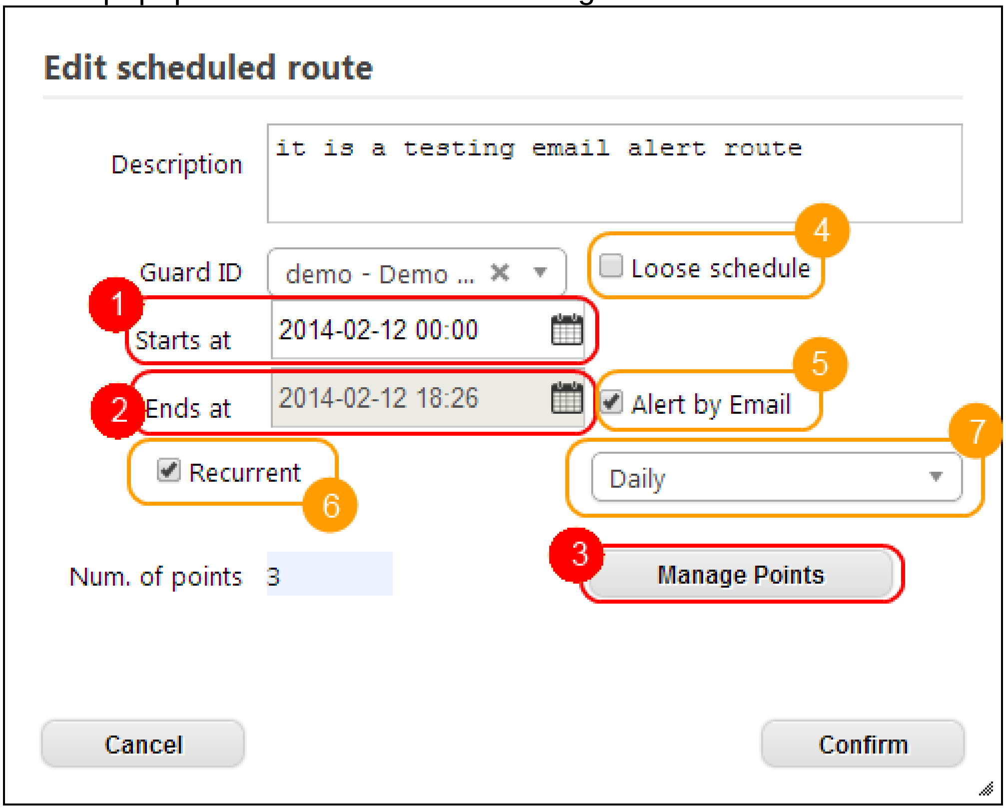
And can be selected from the select box (*7*).

After completing the addition, the newly created scheduled route should appear in the list of scheduled routes.

Editing an existing Scheduled route

To edit a scheduled route you have to first select one from the list of your scheduled routes (*7*).

After selecting from the list, you can click on “Edit” (*2*), which in turn will bring front a popup similar to the one for adding a new Scheduled route:



As with adding a new scheduled route you **have to** provide:

- A start date for the scheduled route (*1*)
- If the scheduled route is a loose route you’ll have to provide an end date (*2*)
- Add/Remove points in the new schedule by clicking the “*Manage Points”* button (*3*)

Note: By checking the “***Loose schedule***” (*4*) checkbox you specify that you want this scheduled route to be loose.

Note: By checking the “***Alert by Email***” (5) checkbox you specify that you want to be notified via e-mail when there’s an **exception** in any of the points in this route. An exception in a route is raised when a point in a route is **not checked** or is checked, but **late** or **early** or **in a wrong order**

Note: By checking the "***Recurrent***" (*6*) checkbox you specify that you want this scheduled route to be recurrent. Available values of recurrence are:

- Daily
- Weekly
- Monthly

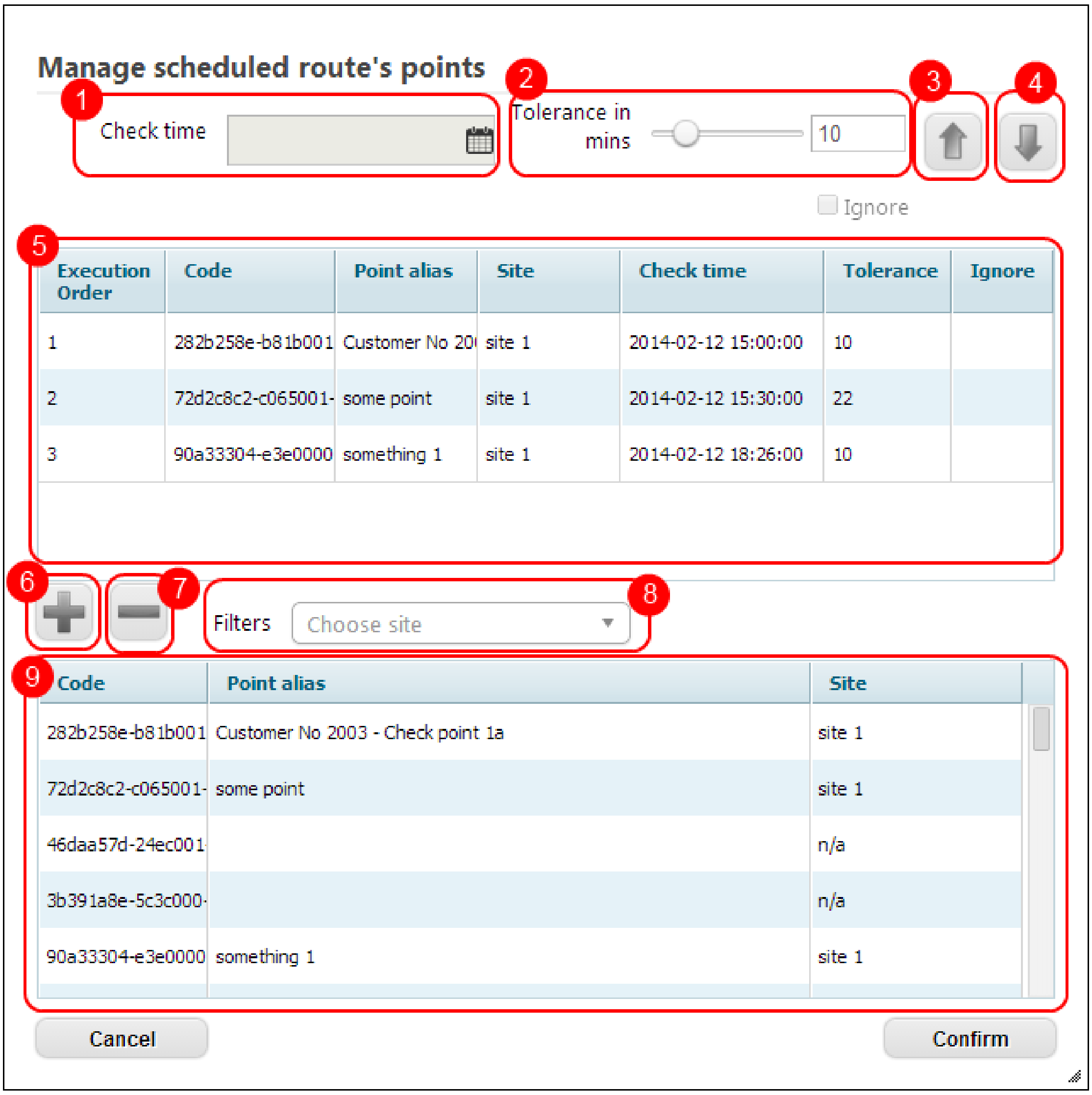
And can be selected from the select box (*7*).

Important Note: Any changes in a scheduled route that is already active, aren't applied to it, instead they are applied in the **next recurrence** of the route (*if the route is recurrent*).

If you confirmed the changes, they should be reflected in the list of scheduled routes.

Managing points in Scheduled route

As mentioned before each scheduled route should have a set of points (*checkpoints*). Management of the points in a scheduled route is accessed through the dialogs of **Adding** or **Editing** a scheduled route, specifically by clicking on the "*Manage Points*" (*3*) button of the dialogs you are show the following dialog:



(1):Used to set the desired check time of a selected point in the scheduled route

(2):Used to set the desired check time tolerance (*minutes*) of a selected point in the scheduled route

(3):Moves the selected point (from (*5*)) up one position in the execution order of the scheduled route

(4):Moves the selected point (from (*5*)) down one position in the execution order of the scheduled route

(5):List of points in the scheduled route

(6):Add selected point from (*9*) to the end of (*5*) (*end of the execution order of the scheduled route*)

(7):Remove selected point from (*5*) (*out of the execution order of the scheduled route*)

(8):Filter (*9*) by client site

(9):List of available points of your company ready to be added in the scheduled route

Adding a point in the scheduled route

1. Select the desired point from the list of available points (*9*)
2. Click on the "+" (*6*) button

Note: The selected point has been added to the bottom of the list of points in the scheduled route (*5*)

Removing a point from the scheduled route

1. Select the desired point from the list of points in the scheduled route (*5*)
2. Click on the "-" (*7*) button

Note: The selected point has been removed from the list of points in the scheduled route (*5*)

Moving a point up in order in the scheduled route

1. Select the desired point from the list of points in the scheduled route (*5*)
2. Click on the button with an arrow pointing up (*3*)

Note: The selected point has moved up a row in the list of points in the scheduled route (*5*)

Moving a point down in order in the scheduled route

1. Select the desired point from the list of points in the scheduled route (*5*)
2. Click on the button with an arrow pointing down (*4*)

Note: The selected point has moved down a row in the list of points in the scheduled route (*5*)

Setting a point's check time in the scheduled route

Important Note: These steps apply only when the scheduled route is not loose

1. Select the desired point from the list of points in the scheduled route (*5*)
2. Click on the rectangle with a calendar icon (*1*)
3. Select the desired date and time of the check

Note: The selected point's value in column "*Check time*" has changed to the date and time selected

Setting a point’s check tolerance in the scheduled route

Important Note: These steps apply only when the scheduled route is not loose

1. Select the desired point from the list of points in the scheduled route (*5*)
2. Move the slider (*2*) until you get the desired tolerance

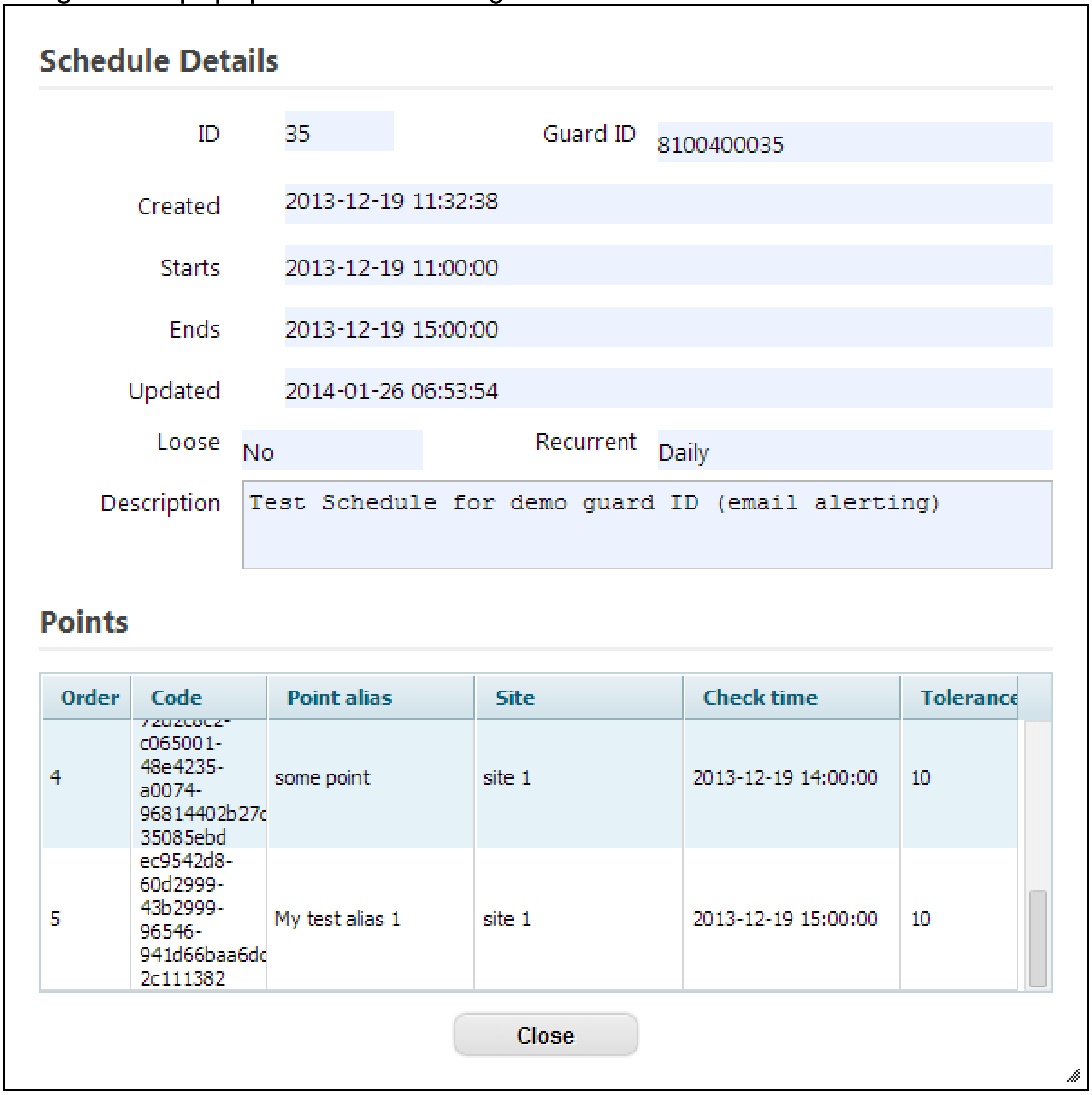
Note: Tolerance is in minutes. For example, given a selected point with **check time**: 2014-02-14 12:00 and **tolerance**: 20 minutes, then the acceptable time range for its check not to raise an exception in the scheduled route is from: 2014-02-14 11:50 to: 2014-02-14 12:20.

Note: The selected point’s value in column “*Tolerance*” has changed to the tolerance selected

Viewing details of an existing scheduled route

To view details of a scheduled route you have to first select one from the list of your scheduled routes (*7*).

After selecting from the list, you can click on “Details” (*2*), which in turn will bring front a popup like the following:



Note: When viewing scheduled route details, the start and end date & time shown are the original that were set when the scheduled route was created/modified.

For example in the image above we can see the details of a scheduled route that is recurrent *daily*. This means that this route will be active, every day, through 11:00 to 15:00.

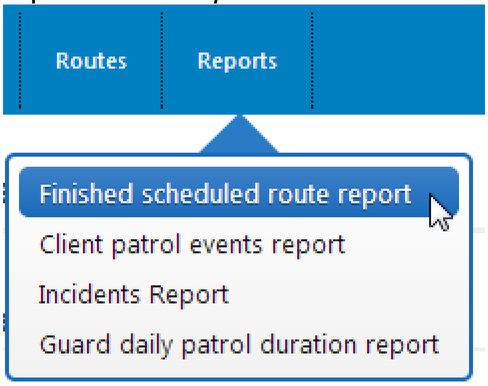
Reporting

Reports are available in two file formats

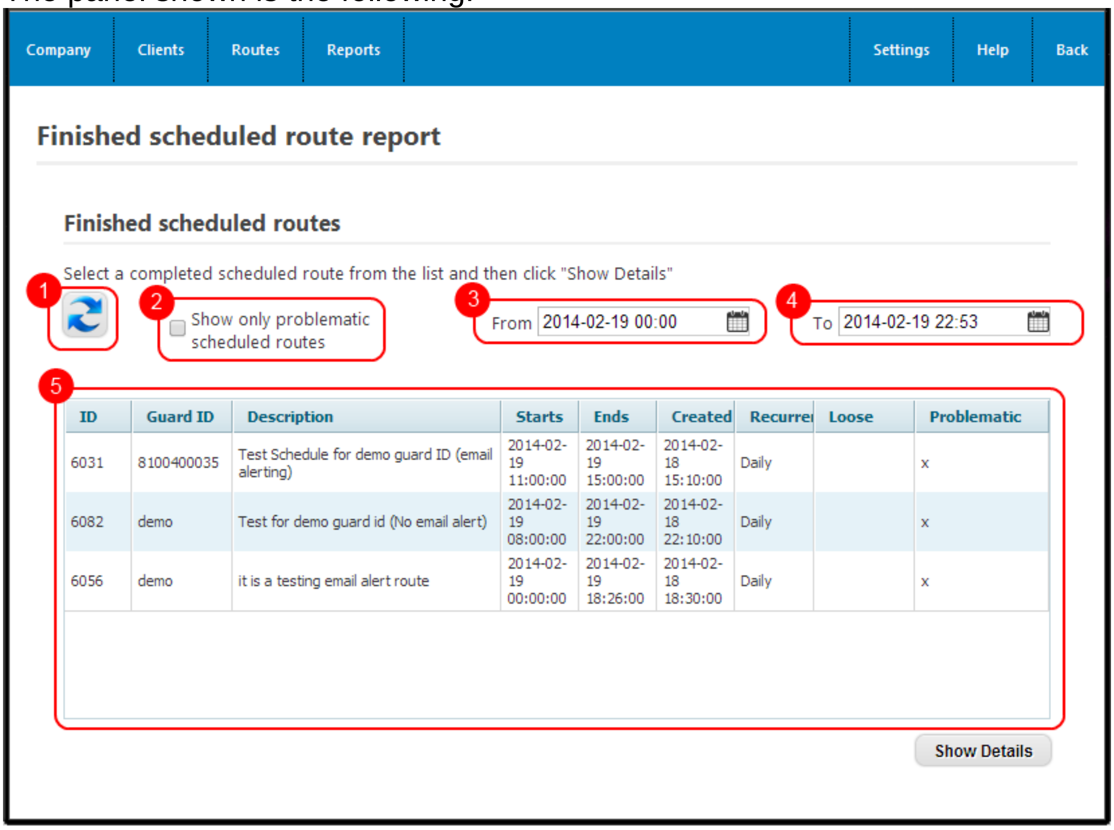
- **PDF**
- **Excel** (*.xslx*)

Finished scheduled route report

You can access the finished scheduled route report panel by clicking on the top toolbar "*Reports*" → "*Finished scheduled route report*" as shown below:



The panel shown is the following:



*(1):*Refreshes the list of finished scheduled routes

*(2):*Shows only problematic finished scheduled routes (*routes with exceptions*)

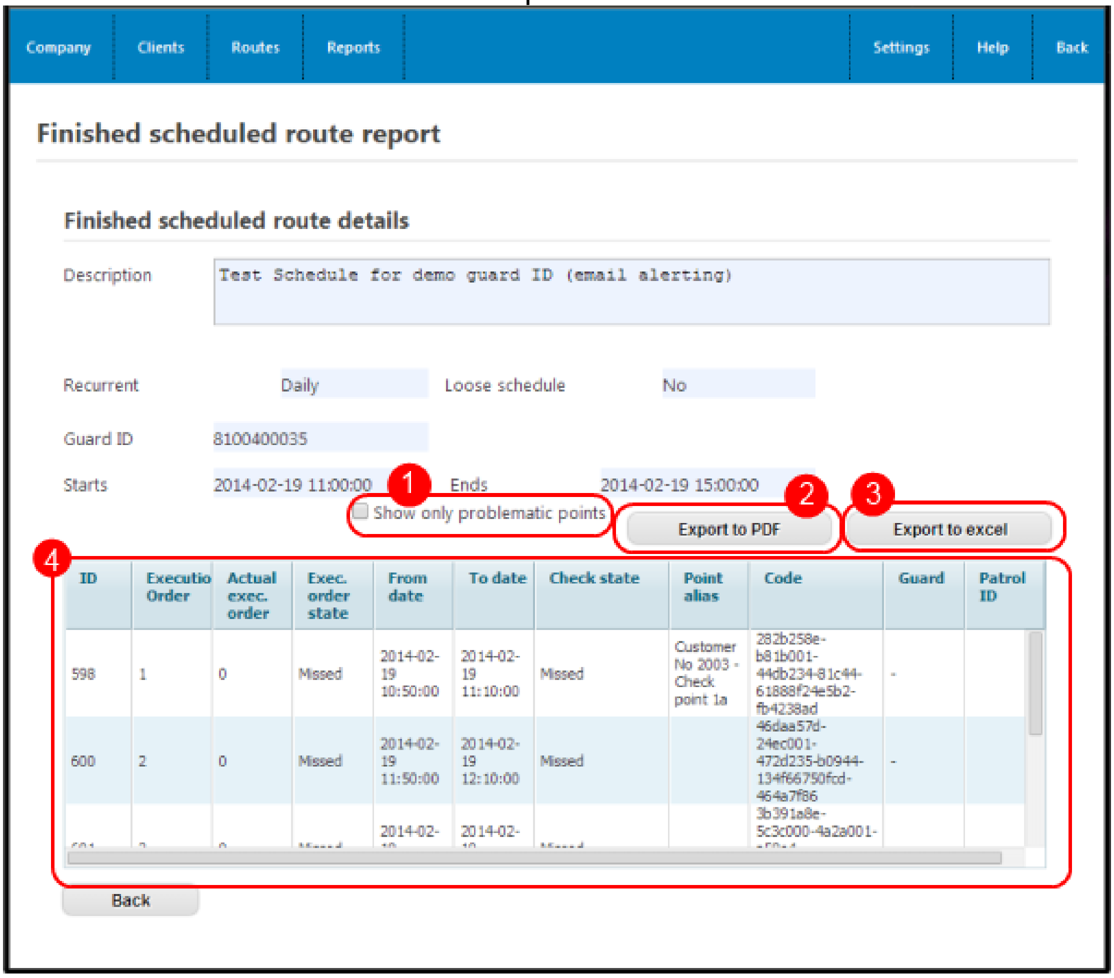
(3):A date filter, filtering finished scheduled routes that **started** after the date specified

(4):A date filter, filtering finished scheduled routes that **started** before the date specified

(5):The list of finished scheduled routes

To generate a finished scheduled route report you have to firstly **select** the finished route for which you want to generate the report.
Then you click on the "***Show Details***" button, which as the name suggests will bring front a panel containing details of the selected finished route.

The finished scheduled route details panel is shown below:



(1):Show only the problematic points of the finished scheduled route

(2):Exports the report in .PDF format

(3):Exports the report in .xlsx (*excel*) format

(4):List of the points in the finished scheduled route

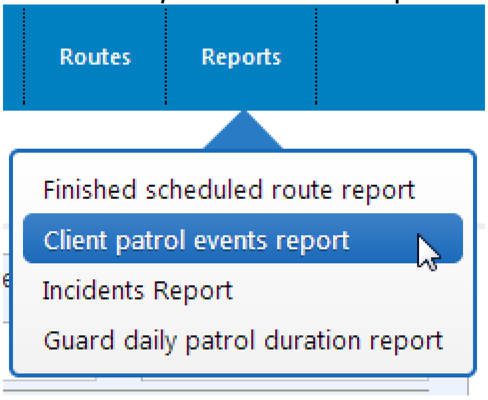
In the list of the points of the finished scheduled route (*4*) you can see details for each point, among others its check state, who checked it (*if it was checked*) etc.

You can always export this information by clicking on the "Export to PDF" and "*Export to excel*" buttons

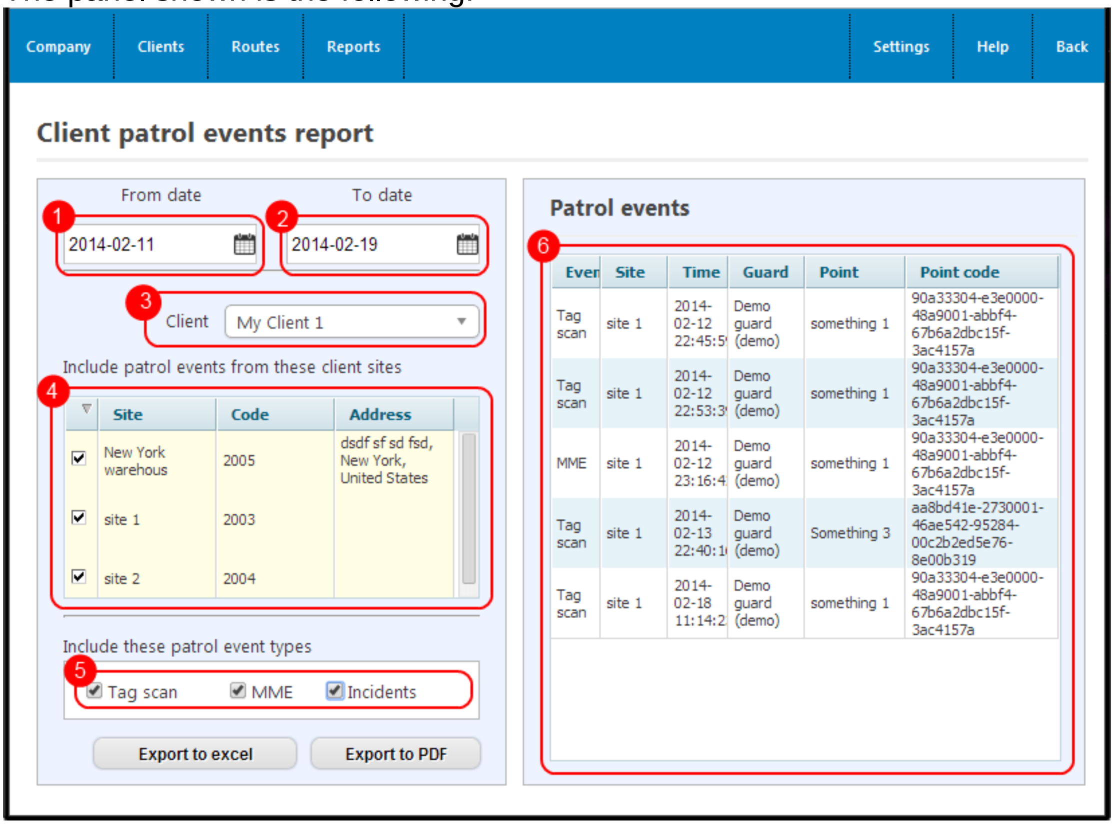
Client patrol events report

A report containing all the patrol events associated with a certain client of your company for a given date range.

You can access the **client patrol events report** panel by clicking on the top toolbar "*Reports*" → "Client patrol events report" as shown below:



The panel shown is the following:



*(1):*Used to specify the minimum date allowed in the report
*(2):*Used to specify the maximum date allowed in the report
*(3):*Used to select the client for which the report is generated
*(4):*List of sites from the selected client
*(5):*Event types allowed in the report
*(6):*List of patrol events in the specified date range that are associated with the selected client

To generate a client patrol events report you have to:

1. Specify a date range from (*1*) and (*2*)
2. Select a client from the select box (*3*)
3. Select at least on client site from the list of available client sites(*4*)
4. Check at least one event type (*5*)

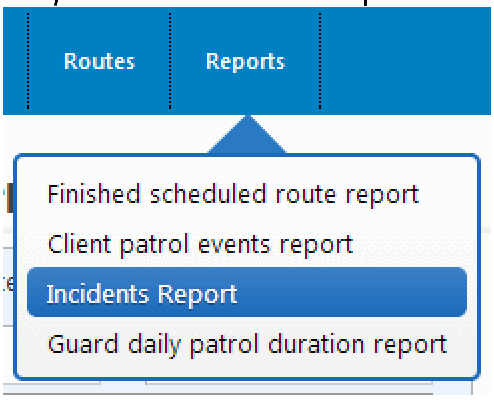
The resulting patrol events are shown in the list (*6*)

You can always export the report by clicking on the “Export to PDF” and “*Export to excel*” buttons

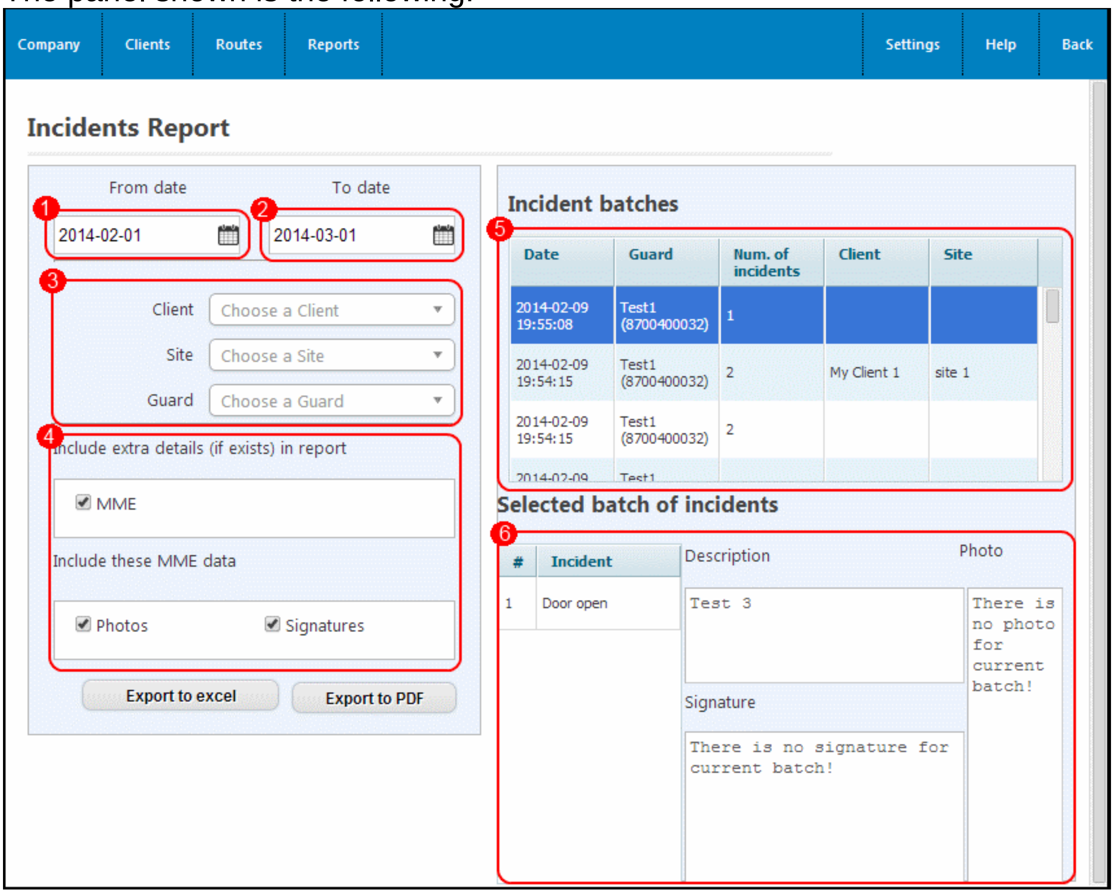
Incidents report

A report containing all the incident batches info of the security company for a given date range

You can access the **incidents report** panel by clicking on the top toolbar "*Reports*" → "Incidents report" as shown below:



The panel shown is the following:



*(1):*Used to specify the minimum date allowed in the report
*(2):*Used to specify the maximum date allowed in the report

*(3):*Used to select the client, site or guard of the incident batches to be shown
*(4):*MME types to be shown in the report
*(5):*List of incident batches
*(6):*Panel which displays the current info from the selected incident batch from list (5).

To generate incidents report you have to:

1. Specify a date range from (1) and (2)
2. Select at least one incident batch from the list of incident batches (5)

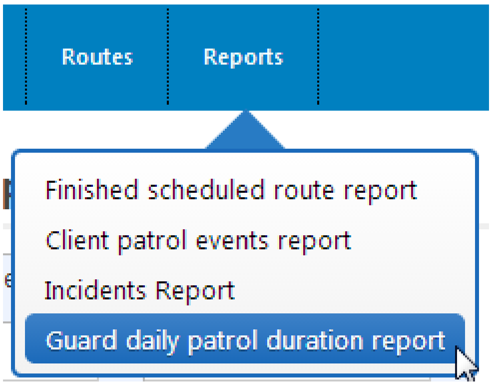
The resulting incidents and their MME info are shown in the incident batch info panel (*6*)

You can always export the report by clicking on the "Export to PDF" and "*Export to excel*" buttons

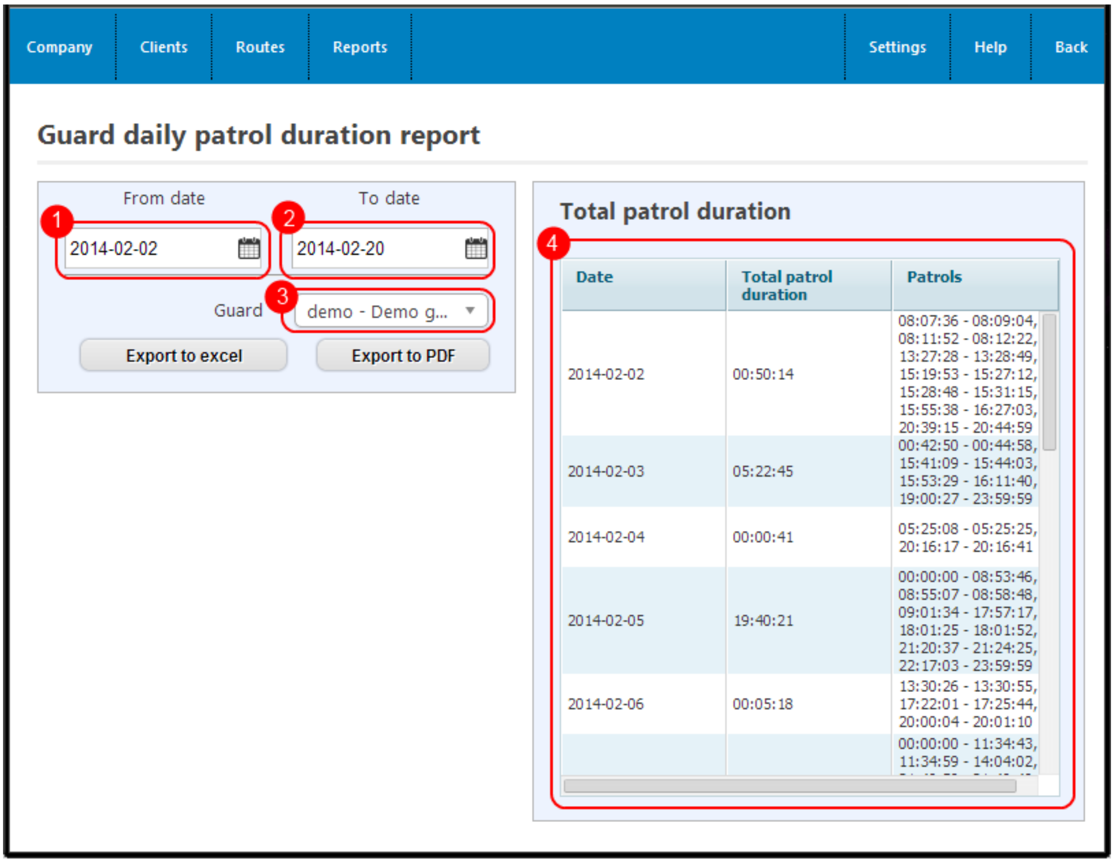
Guard daily patrol duration report

A report containing **total hours** spent **patrolling** per day by a certain **guard** for a given date range.

You can access the **guard daily patrol duration report** panel by clicking on the top toolbar "*Reports*" → "Guard daily patrol duration report" as shown below:



The panel shown is the following:



*(1):*Used to specify the starting day of the report
*(2):*Used to specify the ending day of the report
*(3):*Used to select the guard for whom the report is generated
*(4):*List of patrol hours spent patrolling from the specified guard each day in the specified date range

Note: Each row on its third cell (column "*Patrols*") of the resulting list (*4*) shows the **start** and **end** times of each patrol on that day. For example on the result list on the above image, guard "*demo*" on the 4th of February 2014 has a total patrol time of *41secs* as a result of two patrols on that day, one starting at: *05:25:08* and ending at: *05:25:25* and another one starting at: *20:16:17* and ending at: *20:16:41*

To generate a guard daily patrol duration report you have to:

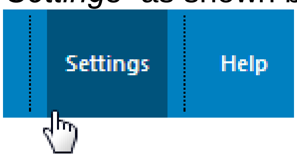
1. Specify a date range from (*1*) and (*2*)
2. Select a guard from the select box (*3*)

The resulting patrol events are shown in the list (*6*)

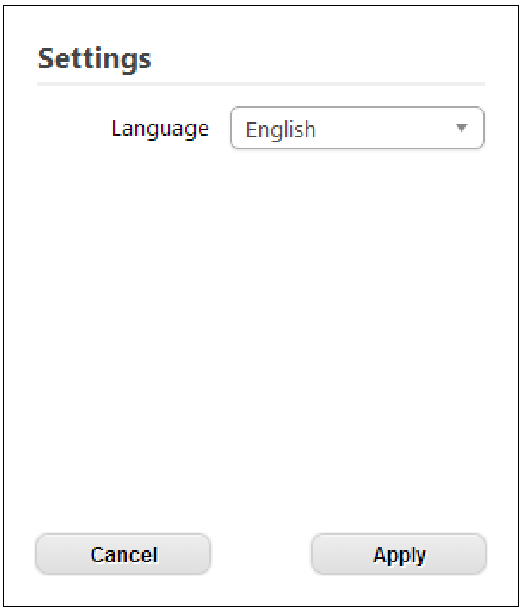
You can always export the report by clicking on the "Export to PDF" and "*Export to excel*" buttons

Settings

You can access the **application settings** dialog by clicking on the top toolbar "*Settings*" as shown below:



You will be presented the following dialog:



Language

QRPatrol Advanced patrol utilities is available in two languages:

1. *English*
2. *Greek*

You can change the application dialog by clicking on the Language select box and choosing the one you desire