GUARDMETRICS
Security Management Solutions

Management Portal
USER MANUAL

Click on any subject in the Table of Contents to jump straight to it.

Revised 06/01/2020

Table of Contents

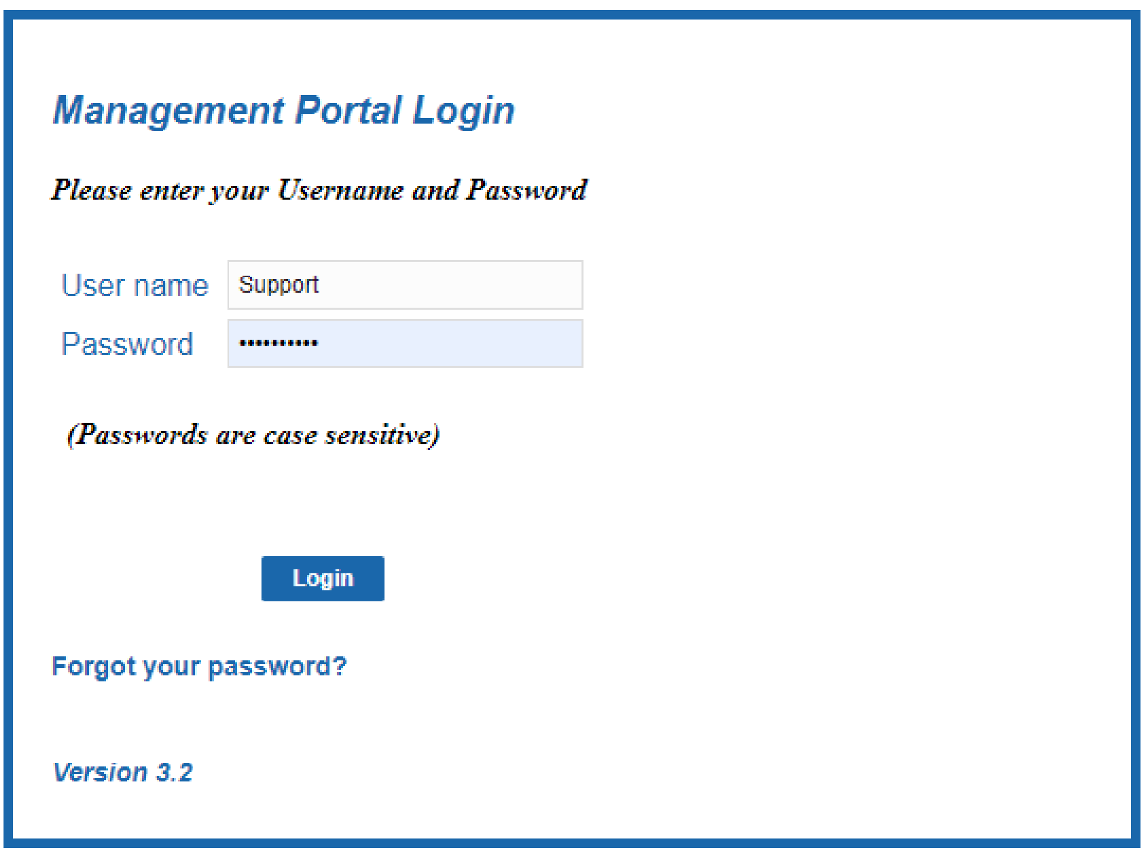
LOGGING IN

To access the Management Portal, go to https://www.guardmetrics.com/customer-login/ **through Google Chrome** (whether on a PC or IOS, for optimal performance) and then click on the yellow "**Management Portal**" tab. Once open, you can save It to your Google Chrome task bar:

1) Click the star to the right of the URL/web address
2) Rename "GuardMetrics Management Portal" (or whatever you wish)
3) Make sure the "Folder" reads "Bookmarks Bar"
4) Click "Done"

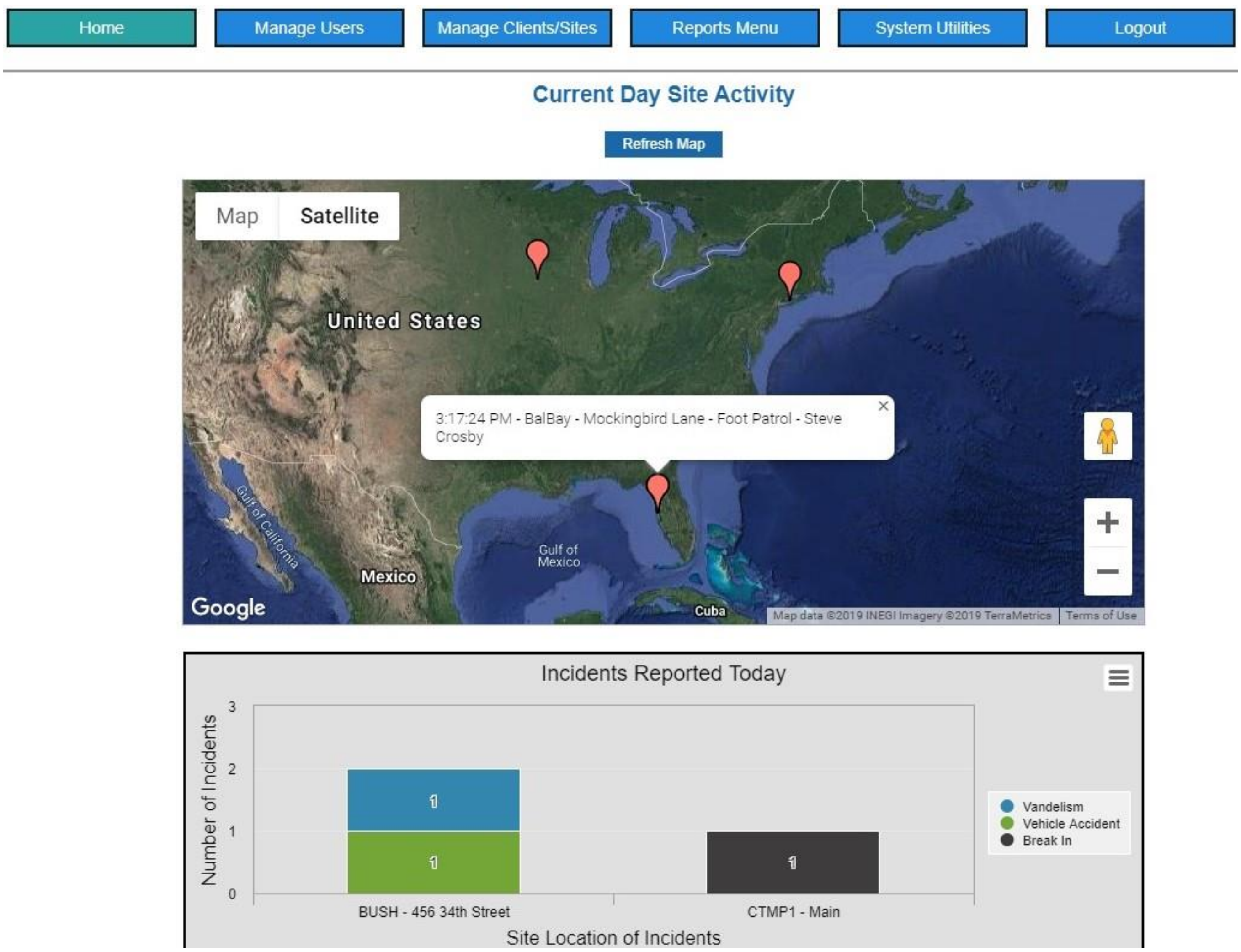
LOG IN SCREEN

When the Login Screen appears, shown below, enter your Username and Password (the same as the Mobile App login), then click the blue "Login" button. Only the password is case-sensitive.



MAIN MENU – REAL-TIME DASHBOARD

Once logged in, you will be directed to the screen shown below. This is an Activity and Incident Report Dashboard that refreshes to real-time when “Refresh Map” is clicked.



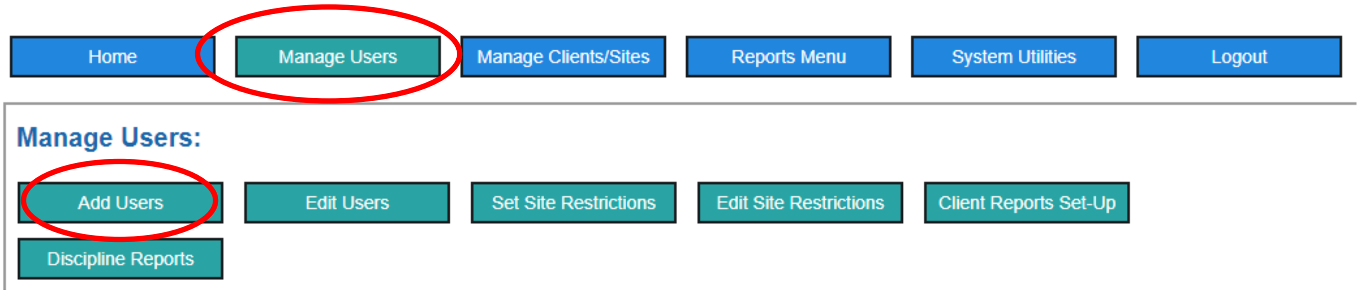
The map will be populated with pins based on your officer’s “Activities” or scans since midnight. The map will expand to include all sites. You can zoom in on these pins, or simply hover over them to see who is doing what at which site, as shown above. If an active officer does NOT show on the map, have them turn on their LOCATION Services.

The graphs below the map will reflect any Incidents that have been submitted since midnight, including the site, officer, and Incident Type (defined by you).

Real-time traffic is observable when “Refresh Map” is clicked to aid Dispatch.

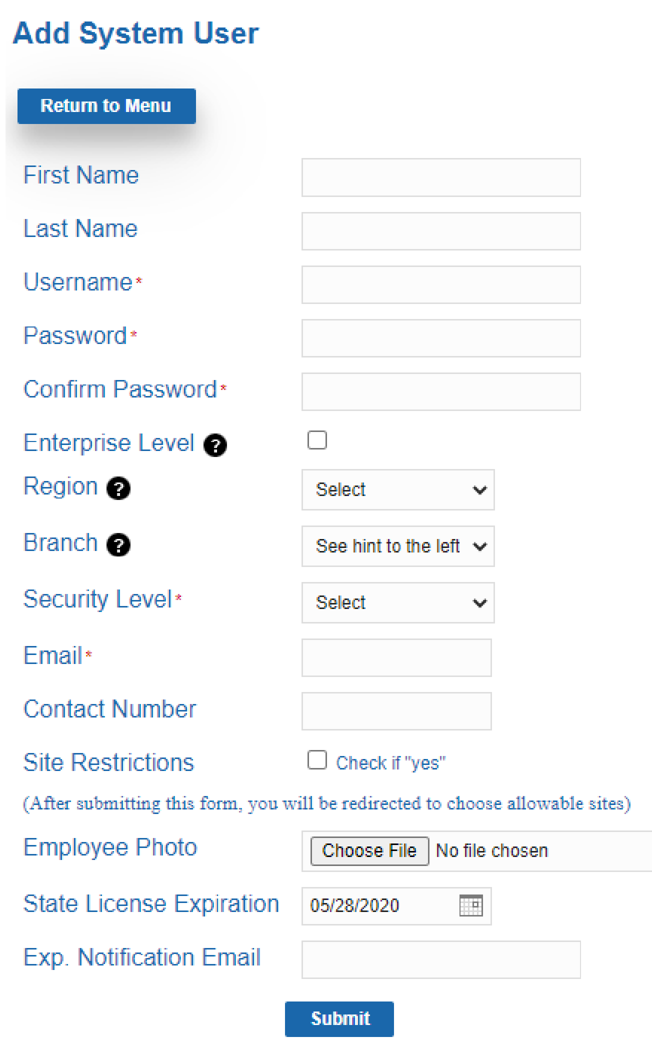
MANAGING USERS

To add, edit, or restrict a system user, click on the “Manage Users” tab on the main menu. A second row of menu choices will appear as in the screenshot below.



ADD A SYSTEM USER

Click on the “Add Users” tab on the Manage Users menu and this screen will appear:



Required fields are indicated by a red asterisk. The username and email address must be unique, systemwide. If a user does not have an email address, simply re-enter the username you chose for them.

The email address allows a user to perform a Password Reset in case it is forgotten. Level 1 Management can also change any user's password without knowing the previous password.

Select **Enterprise** or **Region and Branch**, if applicable.

ASSIGNING SECURITY ACCESS LEVELS

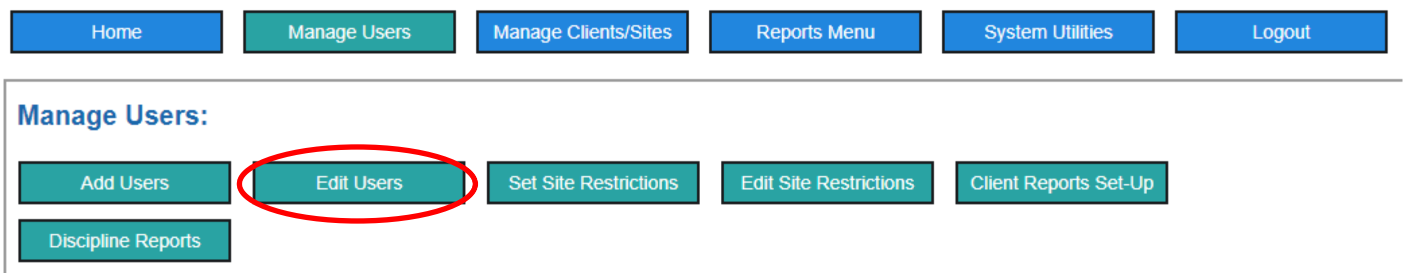
1 - Full Access to everything in the Management Portal and the Mobile App
2 - Management Portal "REPORTS" *only* access. Mobile App including Supervisor Menu.
3 - Mobile App Incl. Supervisor Menu
4 - Mobile App W/O Supervisor Menu
5 - **QR CODE SCANNING REQUIRED**. Mobile App with or without Supervisor Menu.

Level 5 Users: When adding a level 5 field officer you will be given the option to check a "Supervisor Menu" box. So level 5 users have the same permissions as Level 3 or 4, but with the added benefit that, when level 5 scans a QR code to begin working ("Clock In", for example), it sets their location to that specific client and site, so reports are pre-populated with only that site's data until you send them to a different site to scan a tag there. This eliminates the need for site restrictions as well as your officer's ability to see your client list.

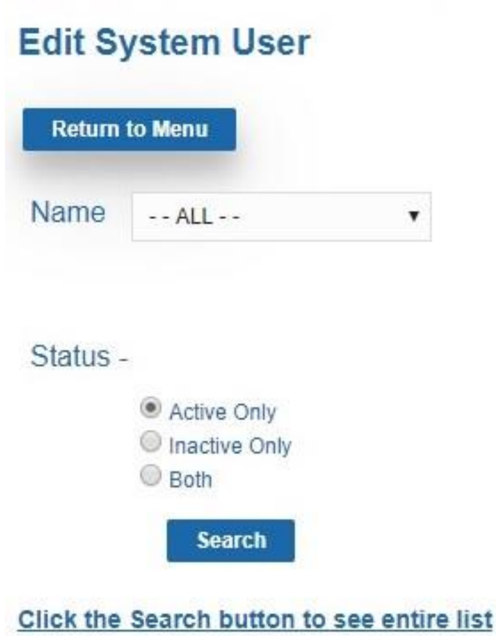
Level 2 – 4 Users *can* be restricted by touching the "Set Site Restrictions" button and will then only be able to select from those clients and sites that they are restricted to, which will appear in dropdown menus in both the Mobile app and the Management Portal.

You can also **Upload a PHOTO** and add state **security license expiration date** and the email address you wish to be notified a month before expiration.

EDIT SYSTEM USERS



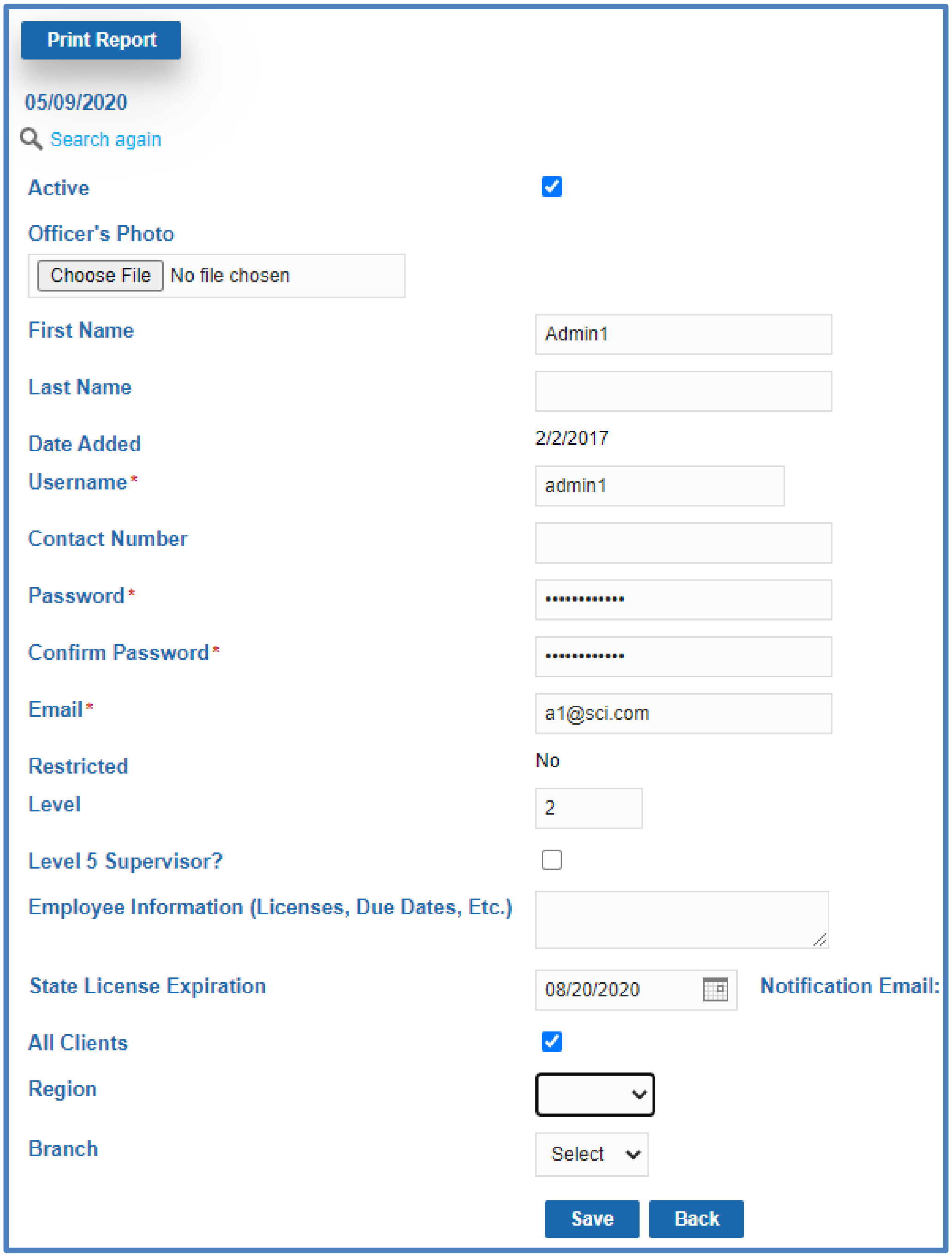
To edit a current system user, click the “Edit Users” tab on the “Manage Users” menu and this screen will appear (defaulting to your ACTIVE users)



You may select a single user, or simply click “Search” to view a list of all users.

Name ▲	Contact Number	Username	Email	Level	Restricted (Level 1 - 4)	Level 5 Supervisor	Active
Smith, Glen	555-555-5555	gsmith@gmail.com	gsmith@gmail.com	2	Yes	No	Yes

If you click on “*View/ Edit Details*” to the right for an individual user, you can make a user INACTIVE (by unchecking the “Active” box”), edit fields, upload a photo, list licenses, change the user’s password, and enter region or branch, if applicable (shown below).



If you make any changes on this page, click the "SAVE" button to save the changes.

SET SITE RESTRICTIONS

The "Set Site Restrictions" button is there if you need to set <u>site restrictions</u> for a level 2 through 4 manager or officer, as to the sites they can see. DO NOT restrict a level 5, as they are restricted already according to where they scanned the last scan-point.

EDIT SITE RESTRICTIONS

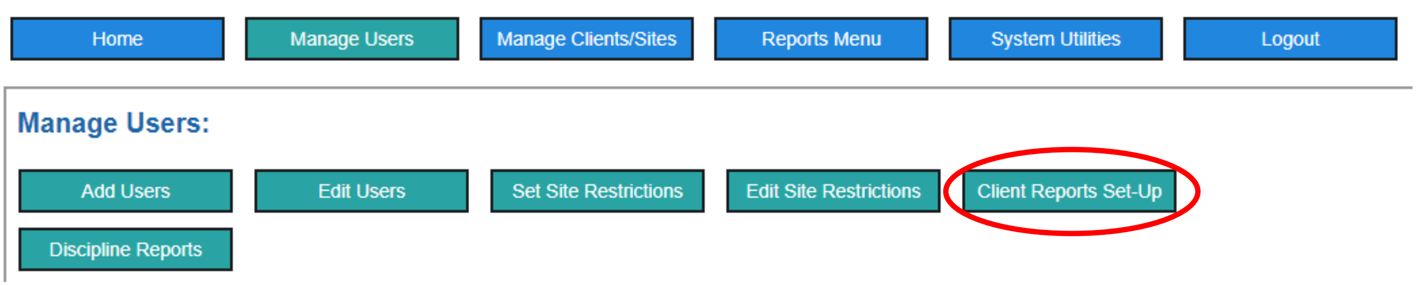
This button simply allows you to edit what sites restricted officers can see, or to remove the restrictions.

CLIENT REPORTS SET-UP

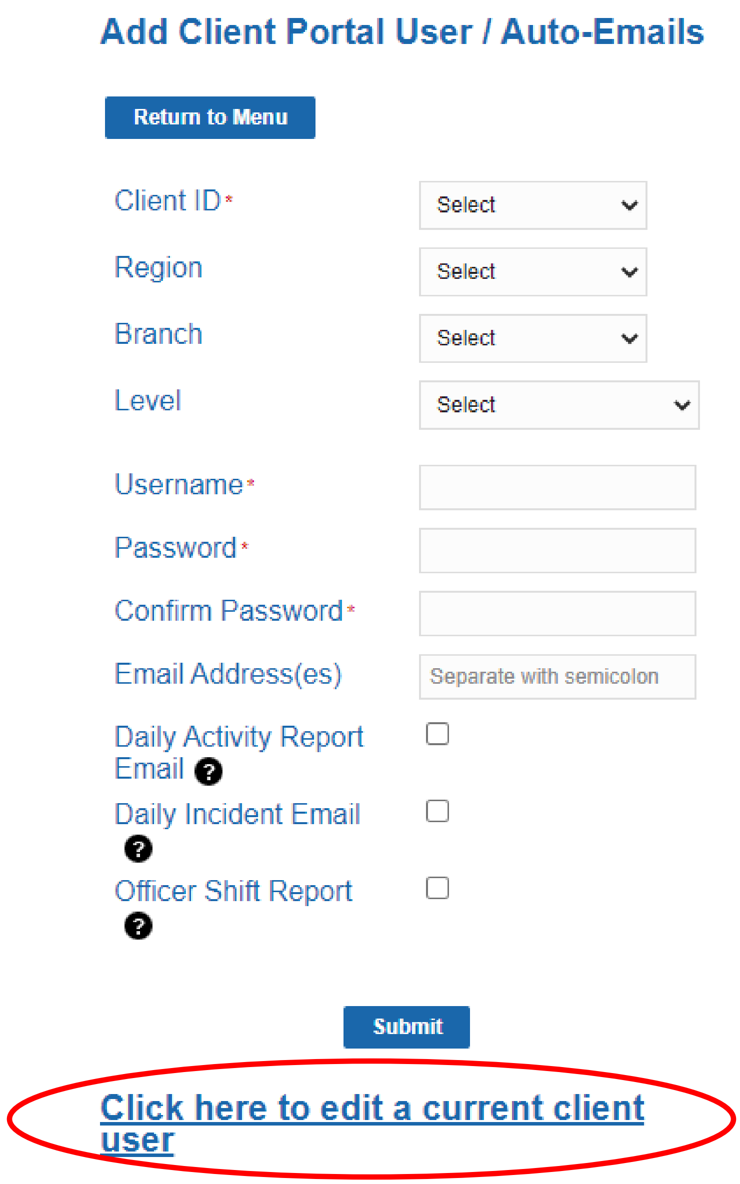
A Client Portal (your customer's REPORTS database) must be set up in order to send auto-emailed reports, whether you give your client access to the Client Portal or not. Your Support contact at GuardMetrics will supply you with a letter/template to roll-out the "Client Portal" feature to your clients, and explain other auto-report functions.

The "Client Portal" is easy, next generation reporting. It is the easiest and most valuable way for your client to automatically receive and store their reports. From here, your client can access their reports from any computer and search for a particular report using a variety of simple filters. The report will be detailed, professional, branded to your company, and contain any relevant pictures and videos. They can then print the report or save it and send it elsewhere.

To add a Client Portal User, and/ or daily auto-reports, click the "Client Reports Set-up" button on the "Manage Users" menu.



The Add Client Portal User/ Auto-Emails screen will then appear, pictured below:



- Choose Client ID and Region and Branch, if applicable.
- The CLIENT is always **Level 1**, so that they can see reports for *all* their sites.
- **Level 2** is if one of the sites under a client should receive their own reports.
- If you wish to send **Daily Emailed Reports** each morning, check the appropriate box(es) and those reports will go to the email addresses listed above each morning.
- To edit an existing Portal User, click the link at the bottom, circled above.

Once a Client Portal User is set up in the system, they can follow this link: Client (REPORTS) Portal to access only their reports from a simple menu, branded to your company, with its own one-page User Manual. Support will provide a letter/template during training that includes this link and instructions.

CLIENT REPORTS OPTIONS

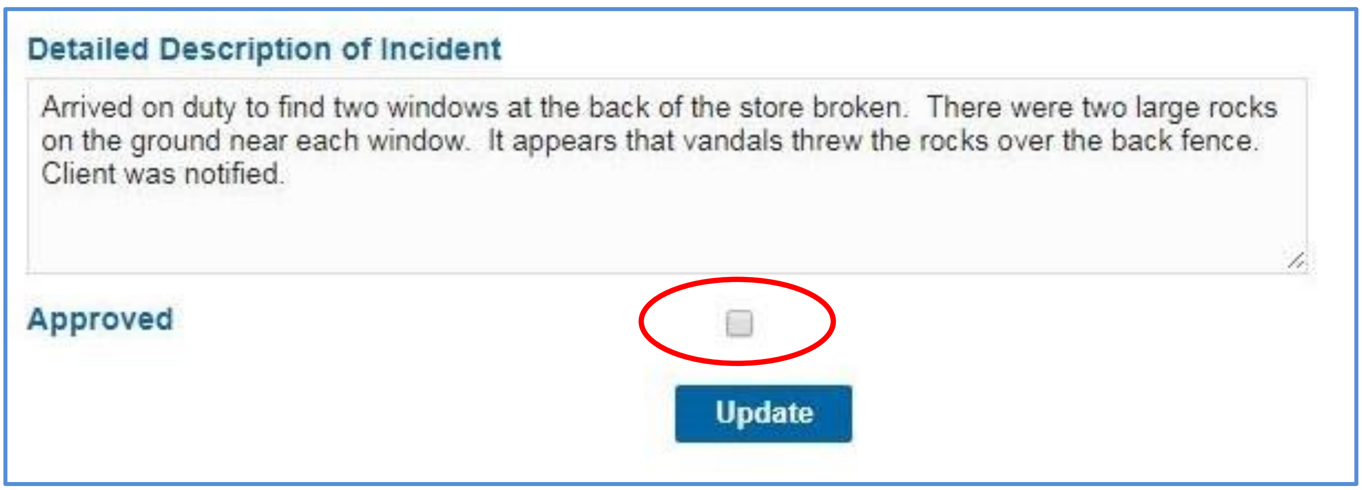
REPORTS APPROVAL OPTIONS

NOTE: If you chose to approve reports, then they MUST be approved before your client can see them.

Your Client Portal user will see activity for their site(s) in REAL-TIME. Upon request, we can activate APPROVALS that, once turned on, will allow Client Portal users to only see data that has been approved by a Level 1 or 2 Manager. You may choose to approve Activities only (Activity Form submissions and scans), Incident Reports only, or both.

APPROVING INCIDENT REPORTS (if requested)

This feature places a checkbox at the bottom of an Incident Report, just above the "Update" button, as shown below.

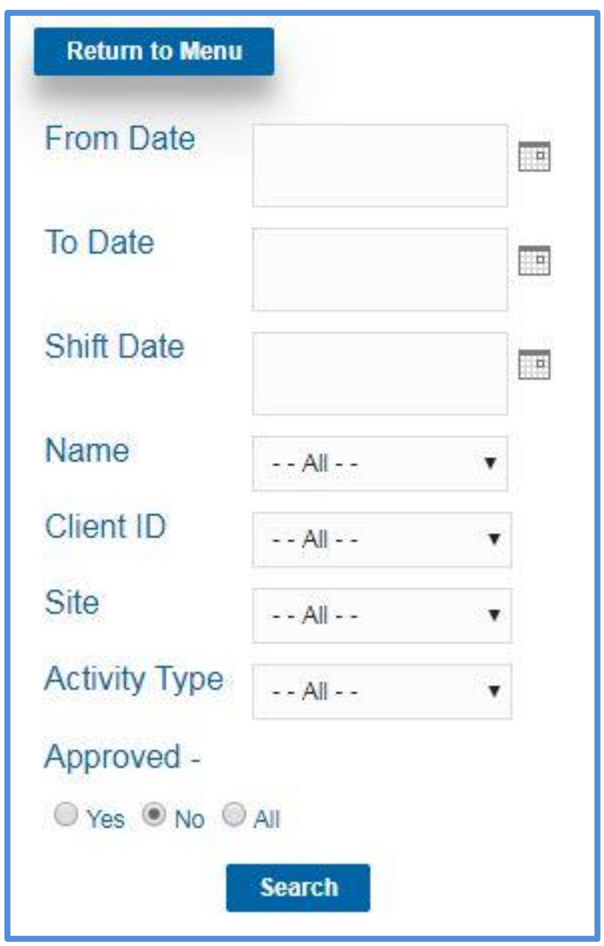


Review the report and make any required edits. Then check the "Approved" checkbox and click "Update". The Incident Report will then be visible in the Client Portal.

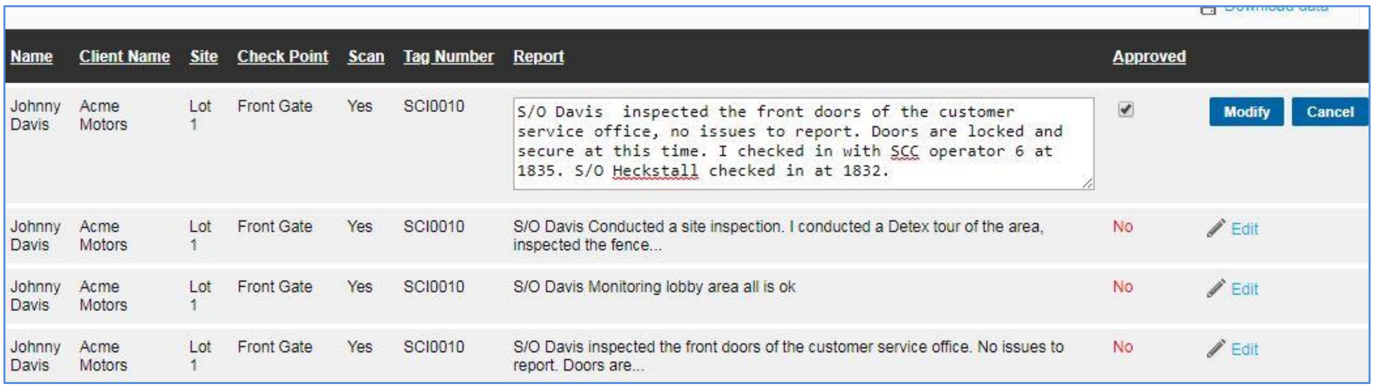
APPROVING ACTIVITY SUBMISSIONS (if requested)

Under the Reports section of the Management Portal, click on the menu item labeled "Activity Approval" to approve which scans and Activity submissions clients see.

The search will default to include ONLY non-approved activity submissions. Filter your search using any or none of the filters, as shown below:



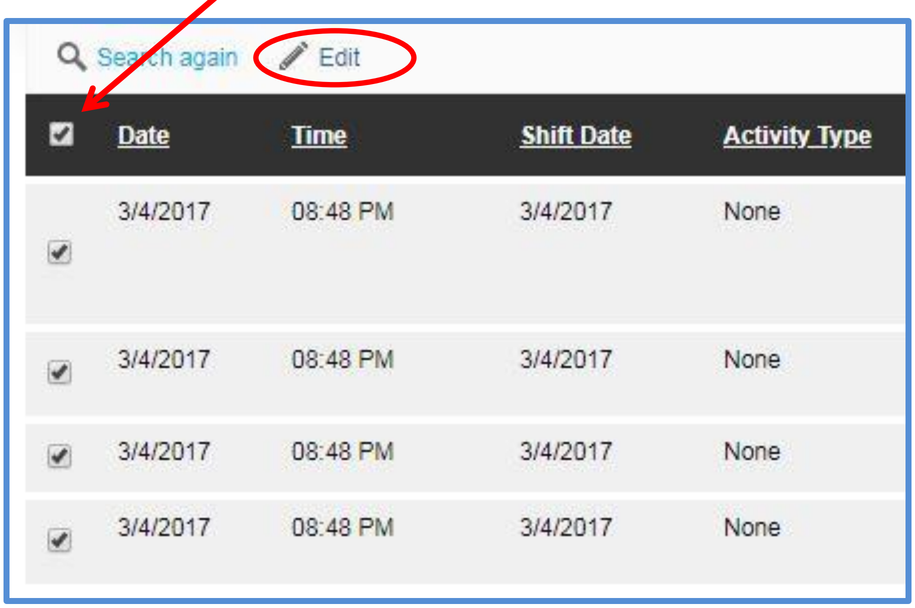
To edit and/or approve a line item, click the blue “Edit” link on the right of the line.



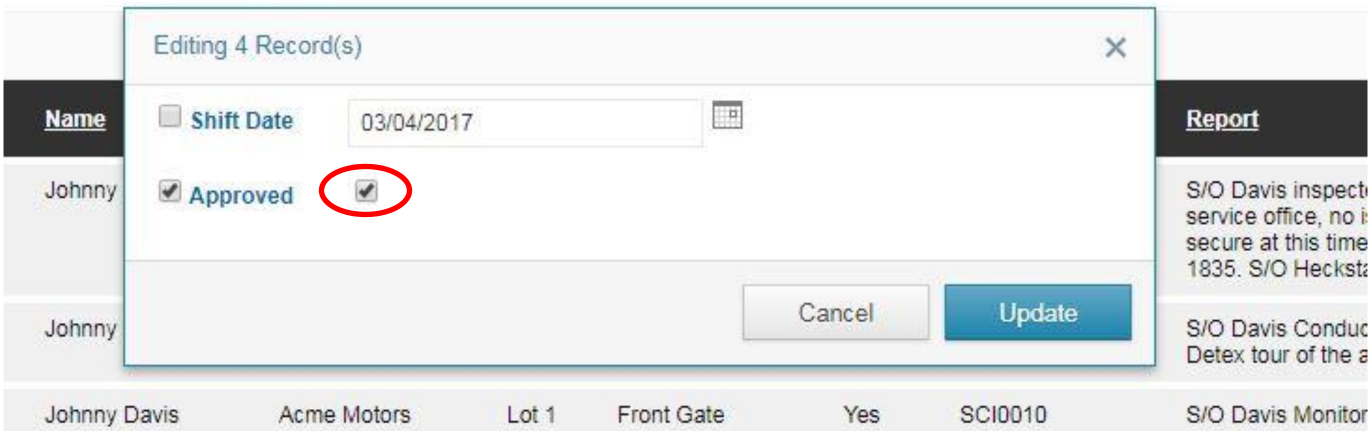
Make any necessary edits, click the checkbox under the “Approved” column and click the blue “Modify” button to save your edits.

BULK APPROVAL

Once you have edited or deleted any line items, as you see fit, to approve several, or ALL items at one time, check the box to the left of the “Date” Label in the header. That will automatically check every box in the column. Just uncheck the box next to any item that you are not ready to approve. Then click the “Edit” link above the header.



The box shown below will then open, giving you the option to edit the *shift date* if needed, or to check the approval box (check the box to the right, which will check both). Click the "Update" button to save your changes, and/ or to approve all Activity line items to feed into the respective Client Portals.



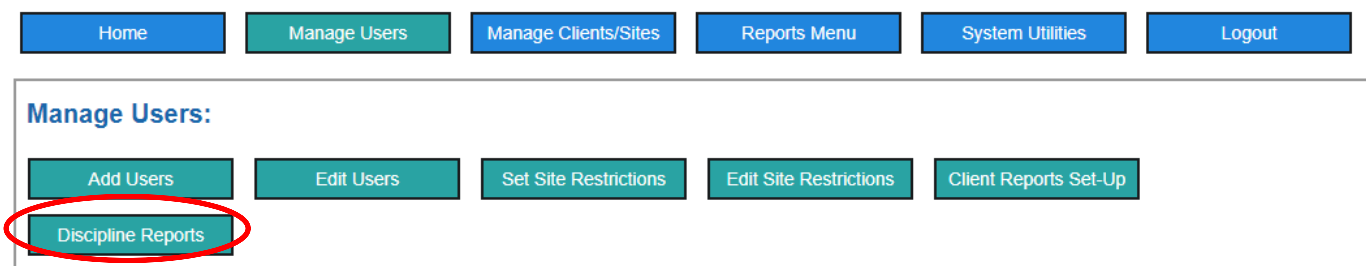
CLIENT PORTAL SATELLITE PHOTOS/ GEO-TAGS

By default, satellite photos **do not** appear on the detail pages of reports in the Client Portal. If you wish to have the photos appear, send a request to support@guardmetrics.com and ask us to turn this feature on.

DISCIPLINE REPORTS

The Discipline Report is the only report that is not kept under the REPORTS button. This is due to the REPORTS button being accessible by both security level 1 and 2 personnel. Therefore, Discipline Reports are accessible only by Level 1 Management.

To view Discipline Reports, click the tab as shown below.



The search page will open as shown below.

You can search by date or by the officer's name, or just click the search button to view all reports. When the list of reports appears, click on the "Details" link to the right of the report you would like to view. The report, including the officer's signature if acquired, will open, as shown below.

Security Company Inc.

Disciplinary Report

Print Report | Back

10/31/2017

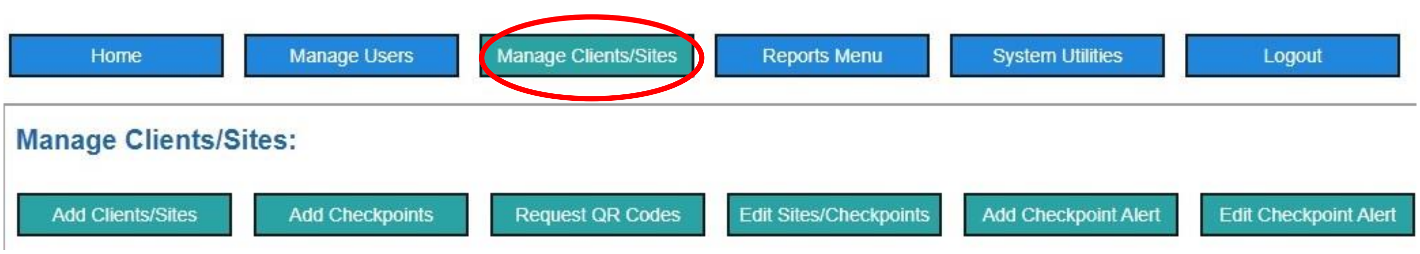
Report Date	10/26/2017
Officer's Name	William Morrow
Supervisor's Name	Jane Doe
Informal Discussion	No
Verbal Warning	Yes
First Written Warning	No
Second Written Warning	No
Suspension	No
Termination	No
Narrative	Officer was caught sleeping while clocked in

Officer's Signature:

WM

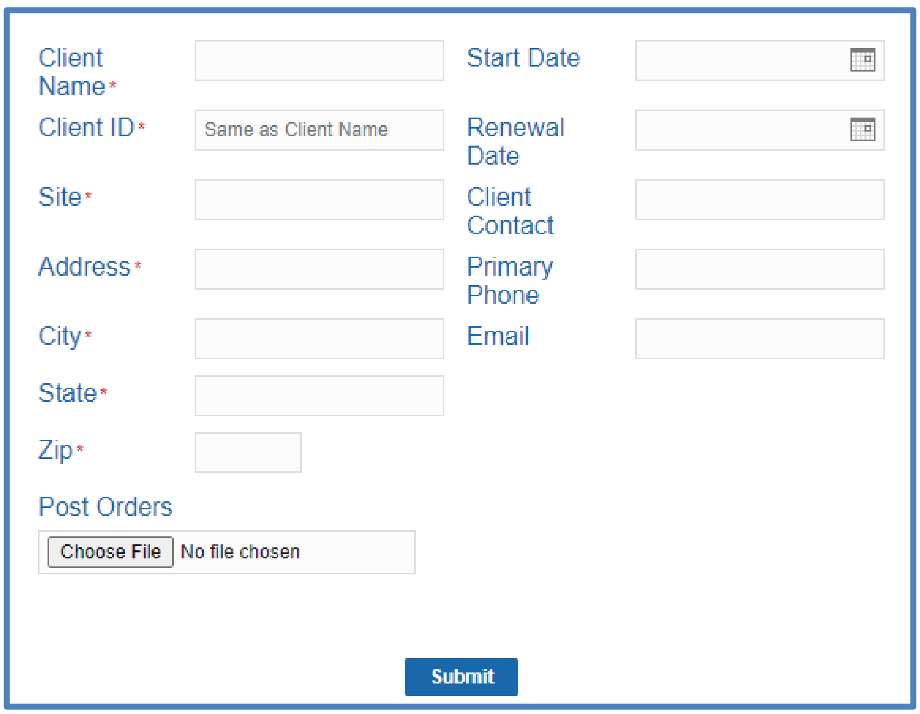
MANAGING CLIENTS AND SITES

To manage clients and sites, click the menu tab as shown below.



ADDING CLIENTS AND SITES

Click “Add Clients/Sites”, under the “MANAGE CLIENTS/SITES” button, and the form below will appear. The fields on the left are required, except for Post Orders (which can be added later). The fields on the right are for your own knowledge and are optional.



ADD CHECKPOINTS for a new or existing site by clicking the next button, “Add Checkpoints”. Press submit after naming each checkpoint, including Clock-In and Clock Out, if you wish to use the Timekeeping reports, then “Return to Menu”.

REQUEST QR CODES for checkpoints you have added by clicking the third consecutive button, “Request QR Codes”. Upon clicking “Submit” we will have your QR codes back to you within a few hours.

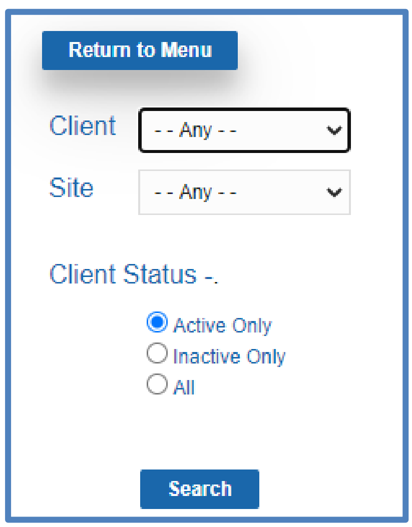
ADD TEMPORARY SITES

Add temporary sites using the "ADD CLIENTS/ SITES" directions above as well. Even if the site will only be a client for one night, or for the weekend, the instructions below explain how to mark the client INACTIVE afterwards, which will remove them from your active client list, but the reports will still be accessible through your system.

Officers Working the temp site must be a different level than 5, unless you create scannable points for the temp site. You can restrict the officer per the instructions on page 7. Just remember to remove restrictions if you make the officer a level 5 again after the temporary site duty is complete.

EDIT SITES AND CHECKPOINTS

Click the "Edit Sites/Checkpoints" button on the MANAGE CLIENTS/SITES menu and this search page will appear, defaulting to your **ACTIVE Sites and Checkpoints.** To edit a single site, pick them from the dropdown menu. Otherwise, click the Search button to view and edit all sites.



There is a separate line item for each checkpoint. Click the blue "Edit" link on the right to edit that checkpoint name. Click "View Details" on the right if you want to drag the virtual checkpoint to match where you placed the physical checkpoint, for geo-fencing.

ADD CHECKPOINT INSTRUCTIONS: You can type in checkpoint instructions on any checkpoint by clicking "edit" on the right, then "Save". These instructions will then appear on the mobile app when that checkpoint is scanned (pictured top of next page).

ADD POST ORDERS: The "Choose File" button will appear in the "Post Orders" column when "Edit" is clicked. Choose the PDF (only) of Post Orders for that site from your computer and click "Save" on the right. Post Orders only need to be uploaded to one checkpoint per site to be available to your officers on the field app.

Check Point	Instructions	Address	City	State	Zip	Tag Number	Client Contact	Primary Phone	Post Orders (PDF Only)
Front Gate	Check all gates	1790 Middle (	Centereach	NY	11720	SCI0010	Joe Allen	2816351350	Choose File
Back Gate	Check all gates along the back and include a photo of any damage	1790 Middle Country Rd	Centereach	NY	11720	SCI0015	Joe Allen		
Main Gate		101 Stethem Drive	Centereach	NY	11720			2816351350	
Rear Entrance		1790 Middle Country Rd	centereach	ny	11720	SCI0024	Brittany Teodoro		
Clock In	Client asked us to watch for vandals today	101 Stethem Drive	Centereach	ny	11720	SCI1001			
Clock Out						SCI1002			

PERIMETER ALERT

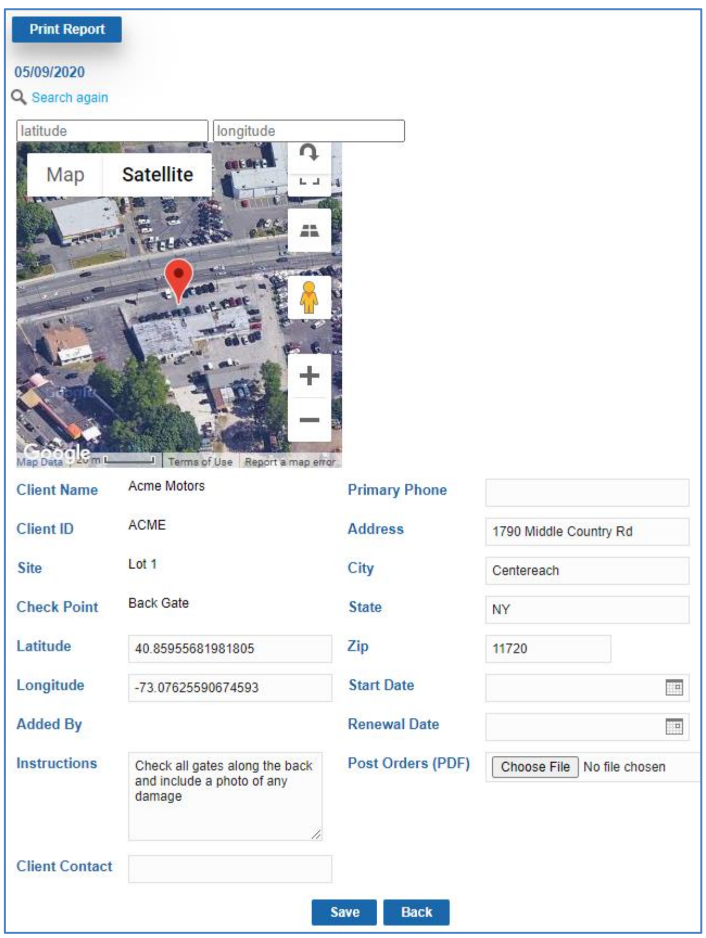
To the right of this same section you will see a field for "Distance Limit (in Feet)".
If you wish to set Perimeter Alerts, to notify you when your officer may be outside their required perimeter, you simply type the number of feet here:

Latitude	Longitude	Distance Limit (in Feet)	Active	
40.859316	- 73.076143	2,500	Yes	View Details Edit Delete
40.85955681!	-73.0762559(	2500	✔	Save Cancel

Remember, if you have NOT moved the virtual checkpoint to match the physical location—described in more detail just below—then the perimeter of every checkpoint will be based on the coordinates that Google recognizes for that site's address. In that case, you might set the Distance Limit at 2500, for example, to encompass the entire site. To move the pin/virtual checkpoint, click the blue "View Details" link on the far right on each line, you will see full details of that site checkpoint, most of which can be edited. You can zoom out on the map to expand it to full screen, in the upper-right-corner, then zoom back in to get the best view of your site.

The pin/virtual checkpoint on the satellite map can now be "dragged" to the precise position of the physical checkpoint if you wish. This will increase the accuracy of the "GPS Variance" field on reports that indicate the number of feet the officer was from the checkpoint when he/she clicked the Submit button. The GPS Variance will show up on your "Database Search" report, but not on reports sent to your client, to avoid confusion of variances that can occur with GPS.

Click the "Save" button at the bottom after making any changes, or the "Back" button if no changes should be made. "View Details" screen:



ACTIVATE PERIMETER ALERT

To activate the Perimeter Alert, simply create an email group called "**Perimeter Alert**" (no "S" on Alert) as explained in the "SYSTEM UTILITIES" section. Any email address(es) linked to the "Perimeter Alert" group will now receive an email alert whenever it appears that an officer is outside the assigned perimeter.

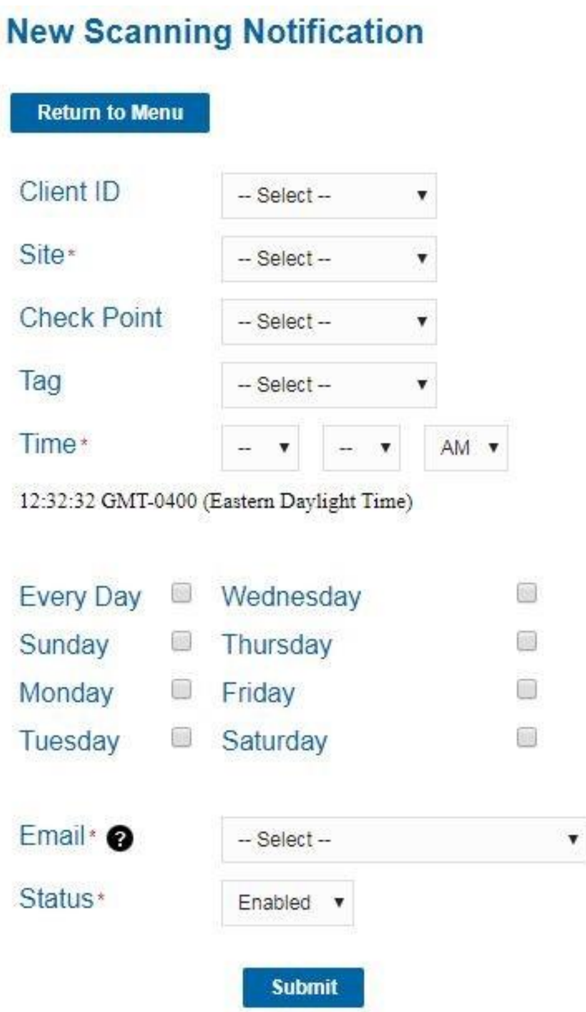
If, upon examination, it seems that the officer was within the perimeter, then the perimeter will need to be expanded for that site or checkpoint due to GPS issues in that area.

ADD CHECKPOINT ALERT (EXCEPTION ALERT)

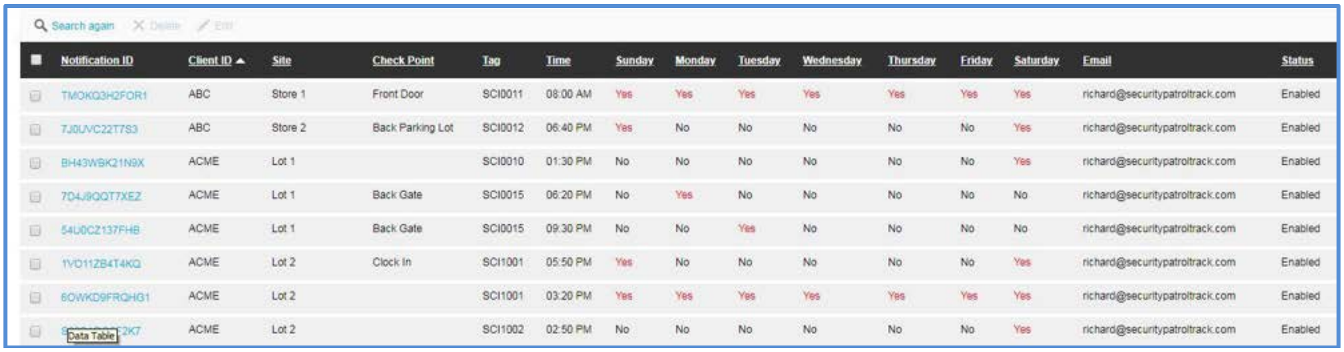
Create a Checkpoint Alert to notify you if a QR Code is not scanned by a certain time, for purposes of assuring that an officer clocked in at a site, or for any reason, such as a pool gate that should be locked at a certain time. If a tag is not scanned within 10 minutes, an alert will be sent by email to the person you designate.

To set an alert, click on the "Manage Clients/ Sites" tab on the main menu in the Management Portal, as shown below. Then click on the "Add New Email Alert" Tab:

Then create the schedule for any QR code. Choose the days of the week the tag should be scanned. You can enter several schedules a day, for the same tag, if you need to. You can choose a different email recipient for each schedule, for each tag, i.e., if the tag is not scanned on a Tuesday, the weekday supervisor can receive the notice, while the weekend supervisor should receive it if missed on a Saturday (pictured below).



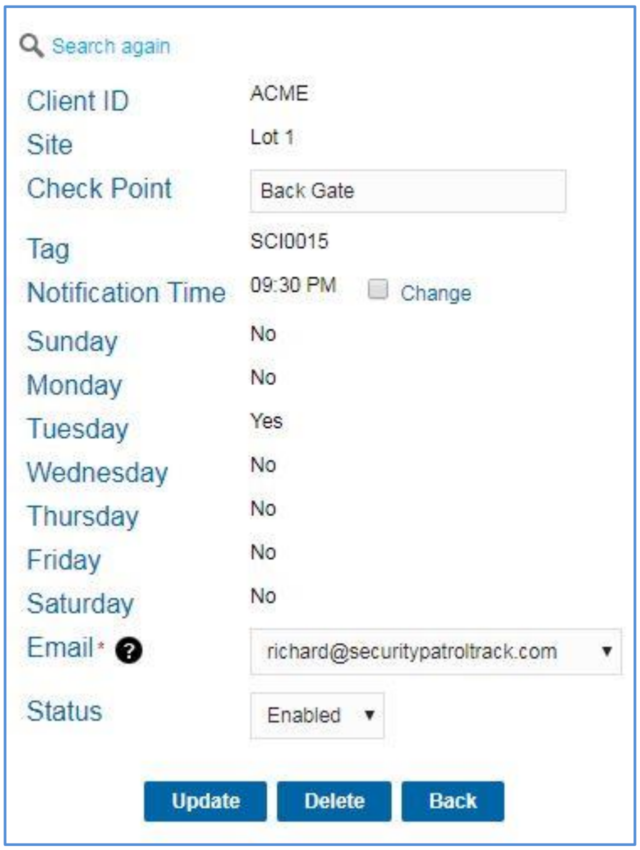
EDIT CHECKPOINT ALERT allows you to change the scheduled scan at any time

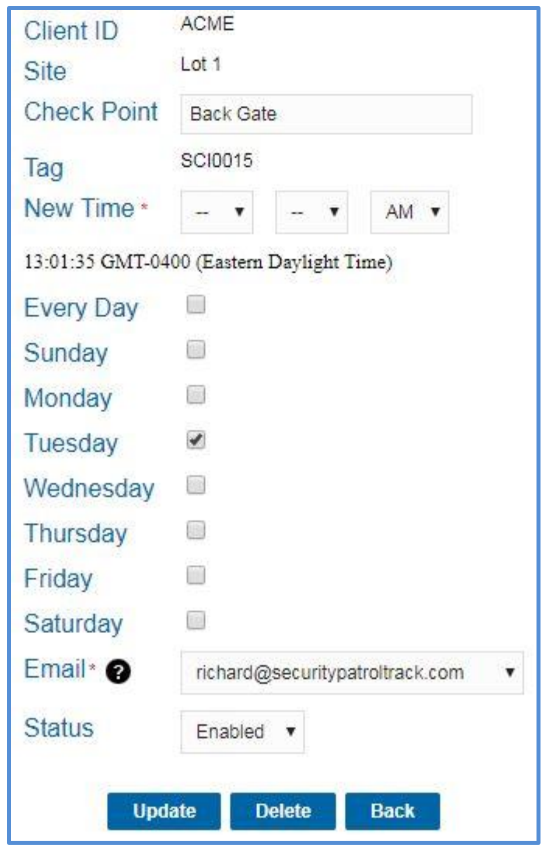


Search again Delete Edit

Notification ID	Client ID	Site	Check Point	Tag	Time	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Email	Status
TMOKQ3H2FOR1	ABC	Store 1	Front Door	SCI0011	08:00 AM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	richard@securitypatroltrack.com	Enabled
7J0UVC22T7S3	ABC	Store 2	Back Parking Lot	SCI0012	06:40 PM	Yes	No	No	No	No	No	Yes	richard@securitypatroltrack.com	Enabled
BH43WBK21N9X	ACME	Lot 1		SCI0010	01:30 PM	No	No	No	No	No	No	Yes	richard@securitypatroltrack.com	Enabled
7D4J9QQT7XEZ	ACME	Lot 1	Back Gate	SCI0015	06:20 PM	No	Yes	No	No	No	No	No	richard@securitypatroltrack.com	Enabled
54U0CZ137FHB	ACME	Lot 1	Back Gate	SCI0015	09:30 PM	No	No	Yes	No	No	No	No	richard@securitypatroltrack.com	Enabled
1VO11ZB4T4KQ	ACME	Lot 2	Clock In	SCI1001	05:50 PM	Yes	No	No	No	No	No	Yes	richard@securitypatroltrack.com	Enabled
6OWKD9FRQHG1	ACME	Lot 2		SCI1001	03:20 PM	Yes	Yes	Yes	Yes	Yes	Yes	Yes	richard@securitypatroltrack.com	Enabled
[illegible]2K7	ACME	Lot 2		SCI1002	02:50 PM	No	No	No	No	No	No	Yes	richard@securitypatroltrack.com	Enabled

Click the “Change” check box, outlined in red below, to open it up for editing! Just click the “Save” button when you’re finished.





REPORTS MENU

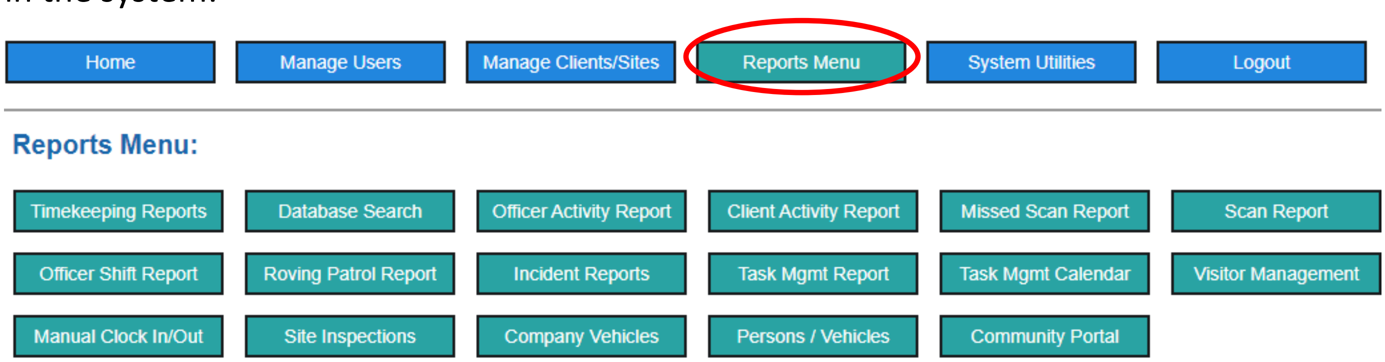
We will cover the functionality of a few key reports in this section, but you are encouraged to experiment with the different filters under different buttons to determine what the best reports are for your purposes. A "Database Search", for example, allows you to use many filters to pull up all related Activity and Incidents, whereas an "Officer Activity Report", which can be run by date range *OR* Shift, is for a single officer's activity.

CLIENT REPORTS

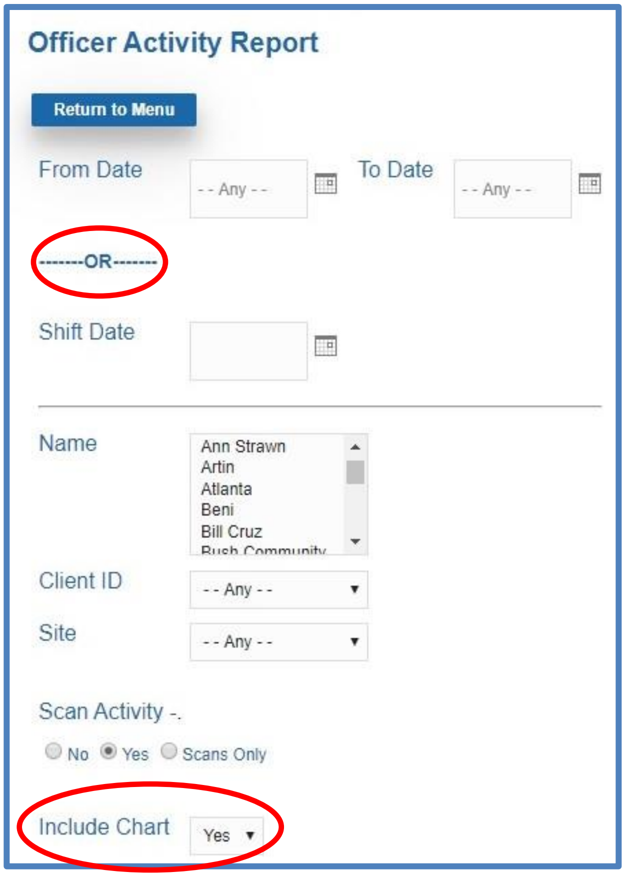
The best way for your customers to receive their reports (and the easiest) is to simply assign them a "Client Portal" through the MANAGE USERS button, as described again here: Add a Client Portal User. Here, all their reports are stored, sortable, savable, and printable. Your client can access their reports from any computer and pull a specific report using a variety of simple filters. When they find the report they want, it will be detailed, professional, branded to your company, and contain any relevant pictures and videos. And there is a one-page **User Manual** for them in their Client Portal, just to make sure.

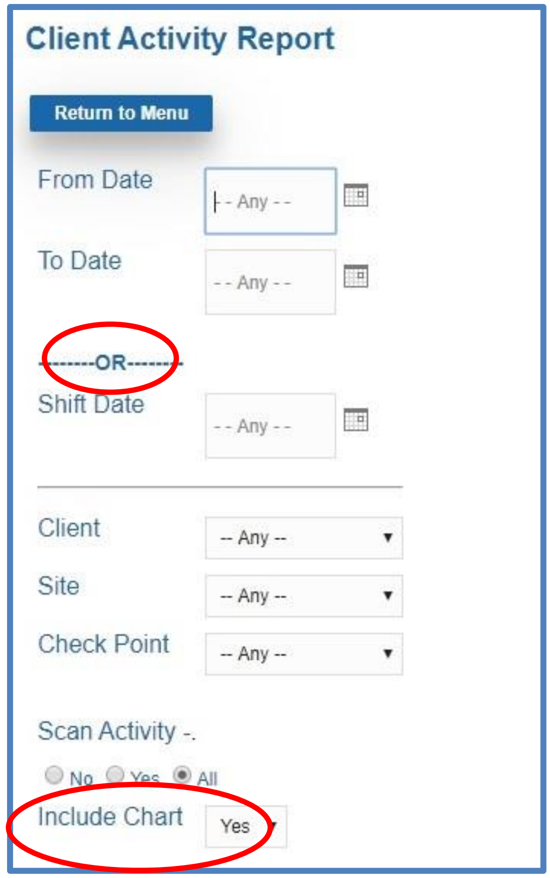
If a client wishes to receive a Daily Activity Report (DAR) email, you can add that option after setting up the Client Portal, under "Manage Users", as explained on page 10.

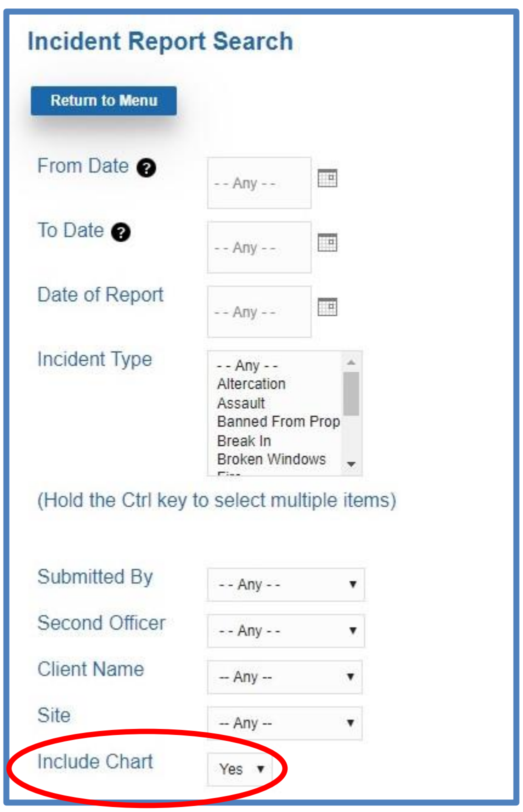
Click the Reports Menu tab on the main menu to display the variety of reports available in the system:



All reports offer management the ability to filter the results (no fields are required) to obtain the exact information for which you are looking. Below are screenshots of a few of the most commonly used Report button's search pages:


Officer Activity Report
Return to Menu
From Date
-- Any --
To Date
-- Any --
-------OR-------
Shift Date
Name
Ann Strawn
Artin
Atlanta
Beni
Bill Cruz
Client ID
-- Any --
Site
-- Any --
Scan Activity -.
No
Yes
Scans Only
Include Chart
Yes

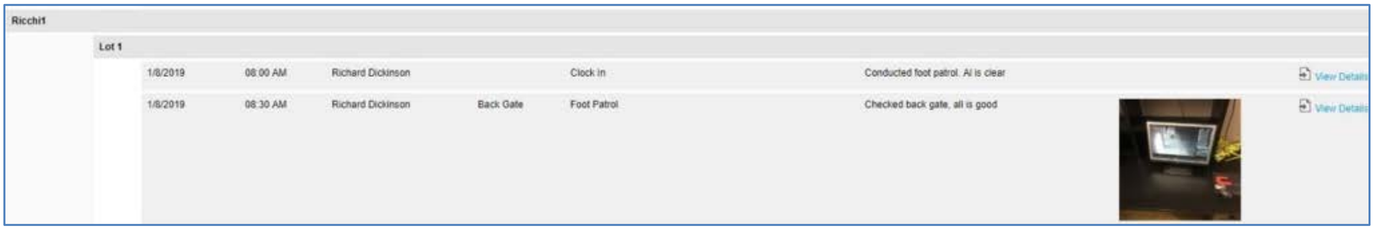

Client Activity Report
Return to Menu
From Date
-- Any --
To Date
-- Any --
-------OR-------
Shift Date
-- Any --
Client
-- Any --
Site
-- Any --
Check Point
-- Any --
Scan Activity -.
No
Yes
All
Include Chart
Yes


Incident Report Search
Return to Menu
From Date
-- Any --
To Date
-- Any --
Date of Report
-- Any --
Incident Type
-- Any --
Altercation
Assault
Banned From Prop
Break In
Broken Windows
(Hold the Ctrl key to select multiple items)
Submitted By
-- Any --
Second Officer
-- Any --
Client Name
-- Any --
Site
-- Any --
Include Chart
Yes

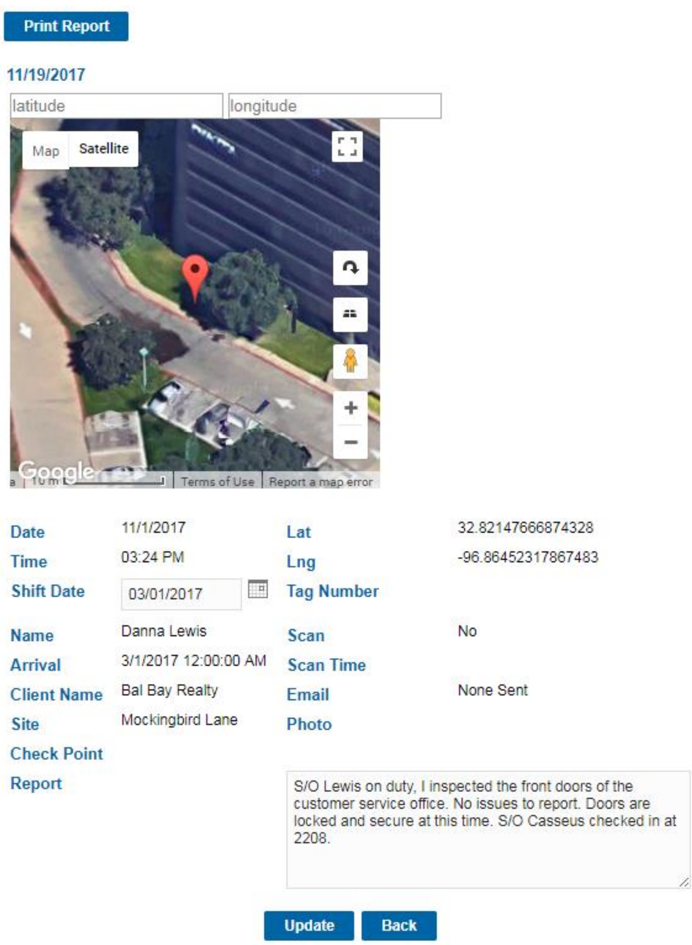

Database Search
Return to Menu
From Date
-- Any --
To Date
-- Any --
Name
-- Any --
Client
-- Any --
Site
-- Any --
Activity Type
-- Any --
Scan Activity -.
No
Yes
Scans Only

CLIENT ACTIVITY REPORT is the data that feeds into your client's various "Client Portals"

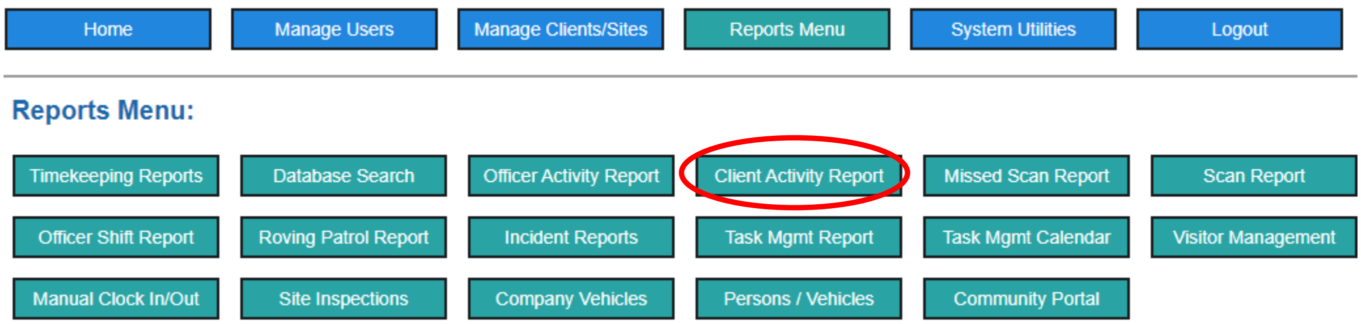
Below is a sample of the first couple entries in a **Client Activity Report**, for one of the client's SITES:



If the manager clicks on the blue "View Details" link on the far right, they will see the full line item report as shown below:



OFFICER ACTIVITY REPORT



If a manager wishes to run the Officer Activity Report by SHIFT, instead of a date range, it must be based on when that officer CLOCKED IN (**An officer MUST scan a *Clock Out*, an *End Shift*, or an *Off Duty* scan point, OR *Log Out*, to end their shift**. This is covered in the **Mobile Officer User Manual**).

You can also save this report, or any report, as a PDF in Google Chrome, to email/push to a client if need be, illustrated below, run by SHIFT date.

SAVE REPORT AS PDF through Google Chrome:

- "Destination": Save as PDF, or Microsoft Print to PDF
- "Layout": Landscape
- "More Settings": ***Uncheck*** "Headers and Footers" & ***check*** "Background Graphics"

The photo below illustrates an Officer Activity Report based on SHIFT, though your clients may be interested in simply seeing the last 24 hours of activity at their site, regardless of who clocked in and out when. Either a SHIFT report, or the Daily Activity Report (DAR) can be auto-emailed each morning as **described on page 11**.

Security Company Inc.

Daily Shift Report

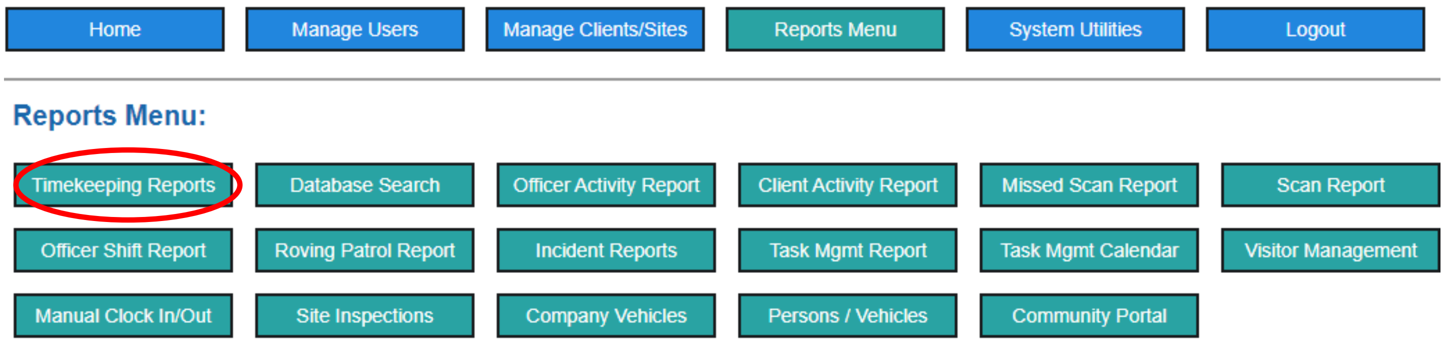
Report Date: 12/14/2017

Shift Beginning On: 11/01/2017

Security Officer: Danna Lewis

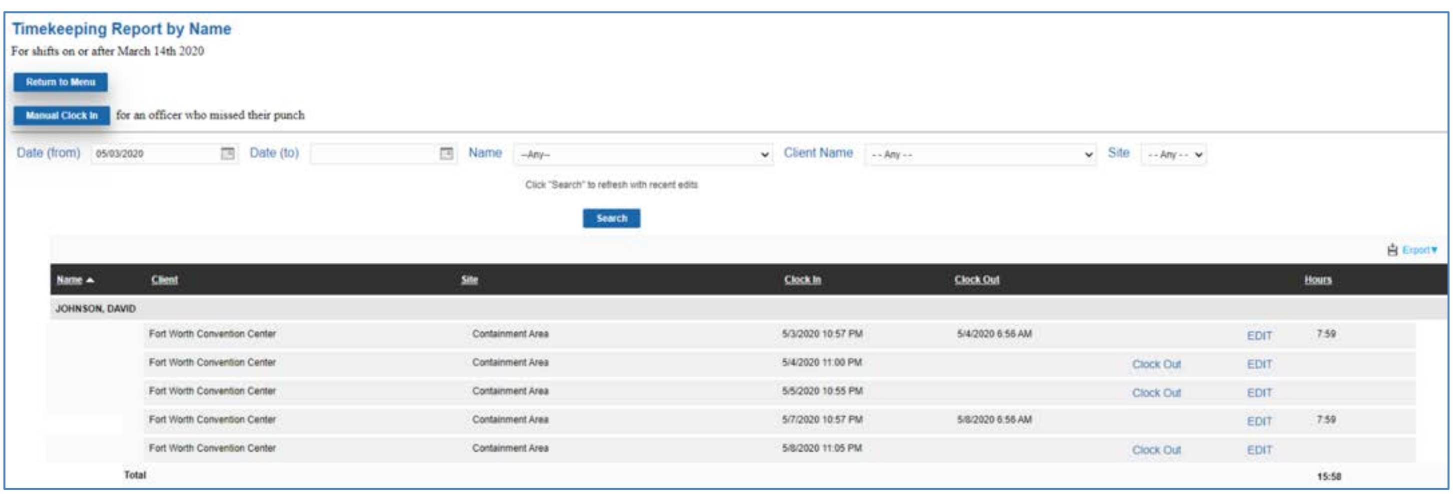
Date ▲	Time	Client Name	Site	Check Point	Activity Type	Report	Photo
12/4/2018	10:08:36 PM	One Hermann	One Hermann Place Apts	Clock In		Officer arrived on post.	
12/4/2018	11:13:01 PM	One Hermann	One Hermann Place Apts		Foot Patrol	Patrolled the property by checking outside parking lots and vehicles one by one to make sure its clear and secure and also checked the pool area to make sure its clear and secure.	
12/4/2018	11:14:47 PM	One Hermann	One Hermann Place Apts		Light Check	Officer turned off the skylounge lights.	
12/5/2018	12:21:57 AM	One Hermann	One Hermann Place Apts	Main Parking Entrance	Foot Patrol	Patrolled the garage by checking all parking lots and vehicles one by one to make sure its clear and secure.	
12/5/2018	1:05:34 AM	One Hermann	One Hermann Place Apts		Foot Patrol	Patrolled the property checked the perimeter and the pool area to make sure its clear and secure all around.	
12/5/2018	2:49:53 AM	One Hermann	One Hermann Place Apts	Main Parking Entrance	Foot Patrol	Conducted patrol throughout 5 garage floors by checking all parking lots and vehicles one by one to make sure there is no suspicious person or activity around.	

TIMEKEEPING REPORTS



Timekeeping Reports can be **run by CLIENT or by NAME** (illustrated below). However, we recommend it not be used for *primary* payroll and billing, because it does not take into consideration specific state laws regarding cut-off times for overtime, etc.

Entries are created when an officer scans the Clock-In and Clock-Out scan points or, when an officer chooses "Clock-In" from "Clock-Out" from Activity Type dropdown.



- **Manual Clock In** (upper left) allows management to clock-in an officer who forgot.
- A **Clock Out** link appears in any clock-in row where an officer forgot to clock out, so that you can enter the clock-out time.
- The **EDIT** link allows you to adjust any of the Clock-In and Clock-Out entries.
- Click "**Search**" to refresh the page and show any changes you have made.
- "**Export**", on the right, allows you to export the report to Excel.

INCIDENT REPORTS

Incident Reports *types* are defined by management through the "SYSTEM UTILITIES", covered shortly.

Incident Reports, submitted by officers in the field using their mobile app, are retrieved by clicking the corresponding menu tab.

You can locate a specific report by using the various filters available on the search page. If there is more than one report that meets your criteria, you will see a list from which you can select, then click the blue "View Details" link on the far right.

A **PERSON/ VEHICLE REPORT**, or multiple Person/ Vehicle Reports, will be attached to an Incident Report if the mobile app user needs to collect police type data on any individual; i.e., height, weight, hair color, D.O.B, etc., on any person involved in the incident. This is accomplished by checking the box "Add Individual's Details" at the end of the Incident Report, before touching "Submit".

The **Person/ Vehicle Report** can also be run as a stand-alone report (as seen above), to search for any reports on persons or vehicles collected in the past, using a variety of filters, including "Report Type". The Report Type includes anything from WITNESS, to PERSON OF INTEREST, to VEHICLE VIOLATION, and draws from whatever Report Types have been submitted by your field officers.

The description of the incident can be edited on this page. If edited, be sure to click the "Update" button to save your changes.

Here is a sample **Incident Report**, before management editing:

Print Report

11/19/2017

Search again

Incident Type	Suspicious Vehicle	Badge Number	4590
Name	Guard1	Police Report No.	142
Date Submitted	10/27/2017	Client Notified	Yes
Date of Incident	10/27/2017	Complainant	Yes
Time of Incident	8:57AM	Complainants Name	Jacob Smith
Client ID	Walgreens	Complainants Contact Info	Phone: 334-555-9582
Site	Store 1	Witnesses	Yes
Type of Premises	Parking Lot	Witness Name	John Doe
Authorities Notified	Yes	Witness Address	123 Lincoln St Englewood, CO 80113
Department Notified	Englewood PD	Witness Contact Information	Phone: 834-555-0723
Time of Arrival	9:10AM	Safety Hazards Present	Yes
Responder's Name	Police Officer	Describe	Suspicious vehicle had aggressive dog tied up to car.

Detailed Description of Incident

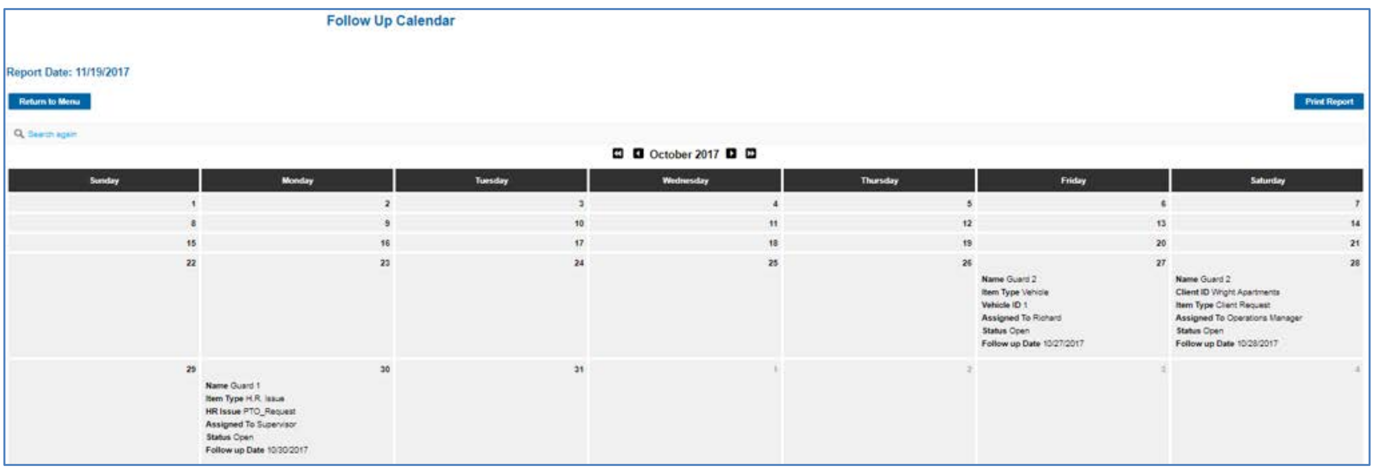
S/O Guard 1 was notified of a suspicious vehicle in the parking lot of Walgreens Store 1. Upon arrival to the scene the vehicle was unoccupied and had an aggressive dog tied to the bumper. The proper authorities were notified and Englewood PD responded to the scene.

Photo 1

Update

TASK MANAGEMENT CALENDAR

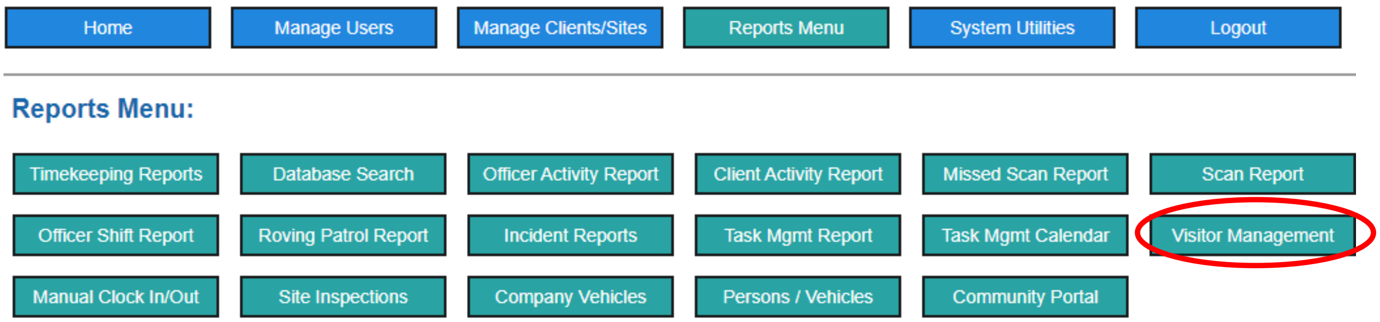
The Task Management Calendar is a tool to help Management track and assign tasks submitted by a field Officer. The items can range from **H.R. issues** (paycheck error, PTO requests) to **Client Requests**. The corresponding, individual Reports appear under the "**Task Mgt Reports**" button.



By clicking the "View Details" link on each entry, the level 1 or 2 Manager can assign the task, update the status, and change the follow-up date. When the task is "Assigned To", the assignee receives an email when "Save" is clicked (if you have entered an email address in the system for that user) containing all the information and is requested to resolve the matter by the follow-up date.

On the Reports Menu, the "Task Management Report" tab will reveal a list of the same follow-up tasks, but in tabular form.

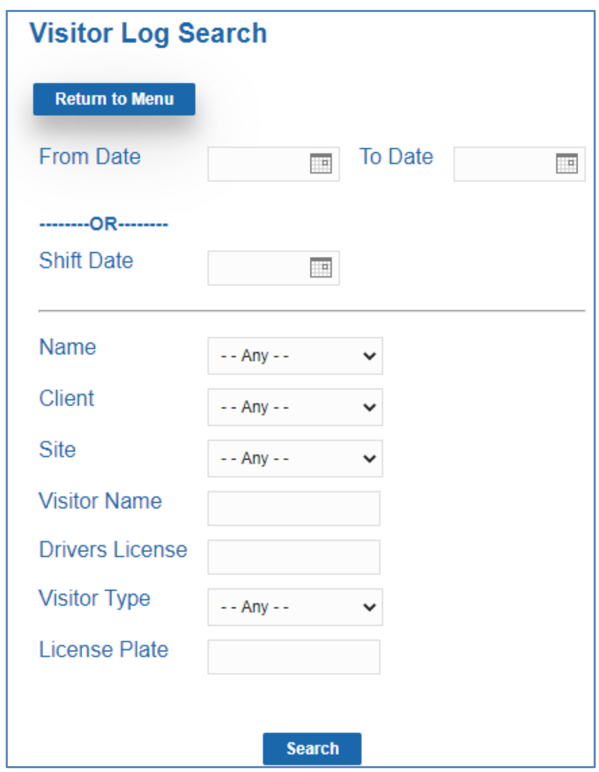
VISITOR MANAGEMENT



This feature is optional. Upon request you can have the menu tab and the mobile app icon removed in order to keep your system appearance cleaner if you have no need for it.

This feature is intended for customers who provide service to HOA's, distribution centers, or any facility that monitors the flow of visitors through a lobby, guard gate, etc. It allows the mobile user to capture a variety of information including photos.

This button in the Management Portal will open a search page to filter the report results where you can view the history.



The "Details" page provides all the information for the visit, including photos and video.

FACILITY ACCESS MANAGEMENT

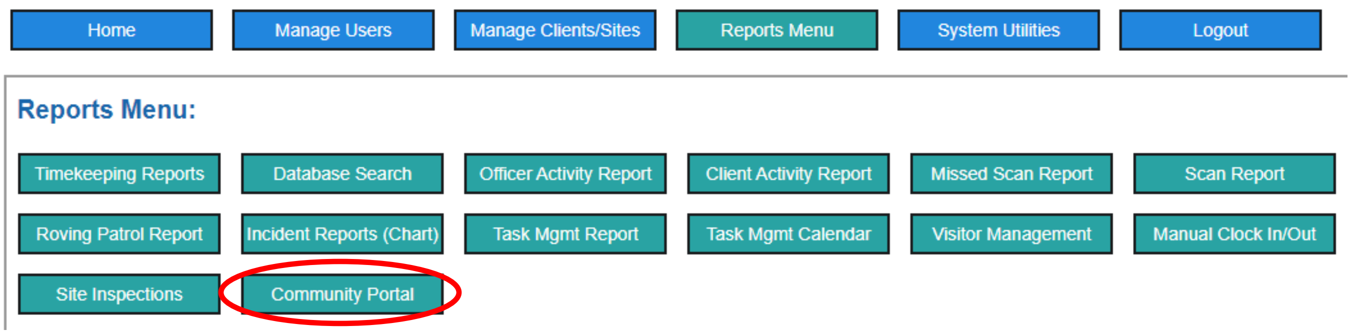
The (OPTIONAL, upon request) facility access management feature allows you to quickly issue an ID card or badge to a recurring visitor on their first visit, and add their information to your database. When they visit again and present their ID card, a quick scan will bring up their information on the officer's device, including the visitor's photo.

Procedure:

1. Request Facility Access Management from support@guardmetrics.com.
2. Email Customer support and request ID QR codes for a site in the necessary quantity.
3. On the Mobile App, scan the special Facility Access QR and enter all the data on the person you are giving it to, including a photo, if you choose.
4. Click the SAVE button to enter the individual's information into the database
5. Print the ID cards containing the QR codes on Avery Business card stock #8877 (or print the codes on the regular waterproof labels and affix to the back of a badge).
6. Separate and laminate each card, if printing cards is the option you choose.

7. On their second visit, simply scan their ID card and the screen below will appear validating their credentials! Click the Arriving or Departing checkbox and click the Submit button to record their visit.

COMMUNITY SECURITY PORTAL REPORTS/ Neighborhood Watch System

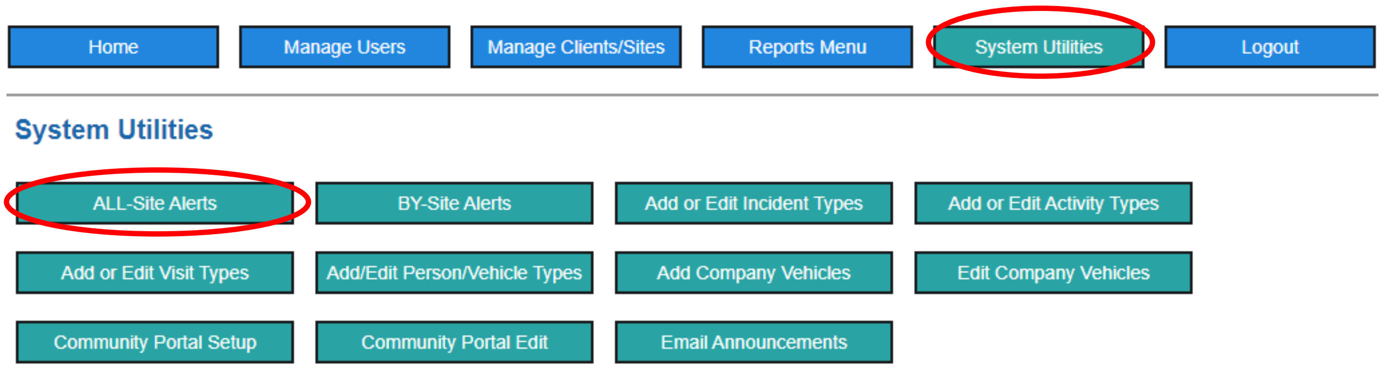


The Community Security Portal feature—an “electronic neighborhood watch system” for which set-up is covered in the following “SYSTEM UTILITIES” section—allows YOU to add an extra layer of security that 99% of your competitors CANNOT offer!

The System Utilities section will cover how you direct the alerts for the different functions to go where you wish.

This report allows you to search for user entries by Security Concern, Visitor Notifications, and Vacation Watch, then by date and by Property ID (same as Client ID).

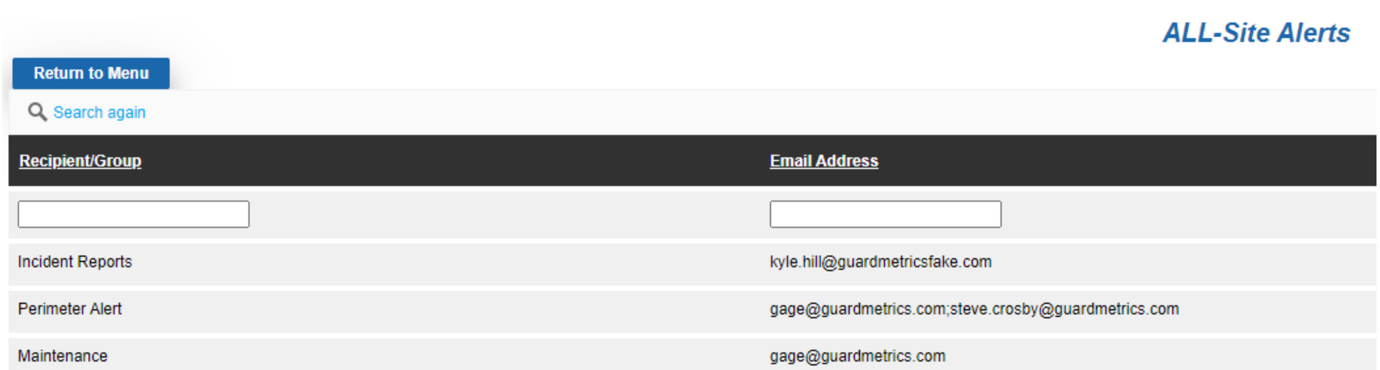
SYSTEM UTILITIES



ALL-SITE ALERTS

"ALL-Site Alerts" are individuals or groups, set by Management, to whom email alerts/ Report can be sent by mobile app users when they select that group name from the drop-down options in the Activity Form and other reports. Examples of groups: Management, HR, Maintenance, etc. NEVER enter a client in **ALL-site** alerts.

Incident Reports and **Perimeter Alert** are automatic email groups, sending anyone in those groups a real-time email alert while the report simultaneously goes into the system. Any other email recipients/ groups created must be selected from the email dropdown menu in the mobile app and *pushed* when "Submit" is touched. To add more than one email recipient to the group simply separate email addresses with a semicolon **;**


ALL-Site Alerts

Return to Menu

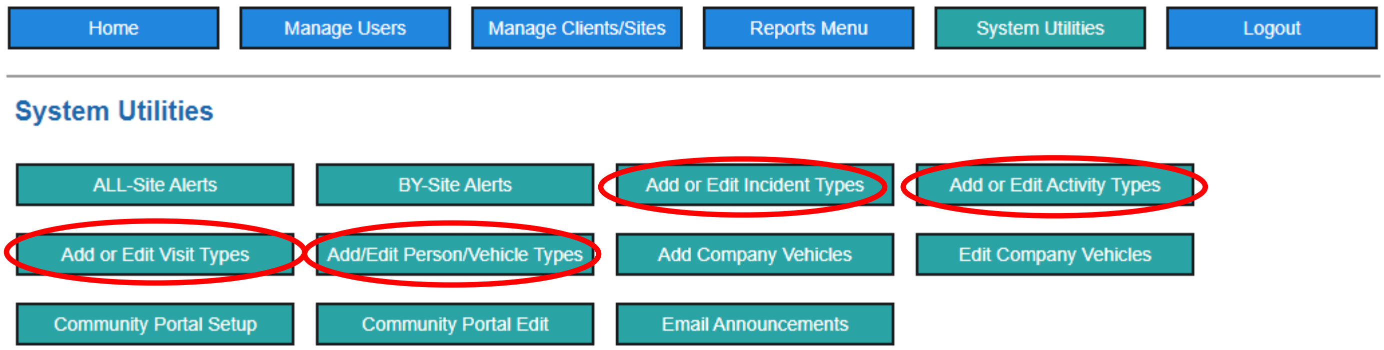
Search again

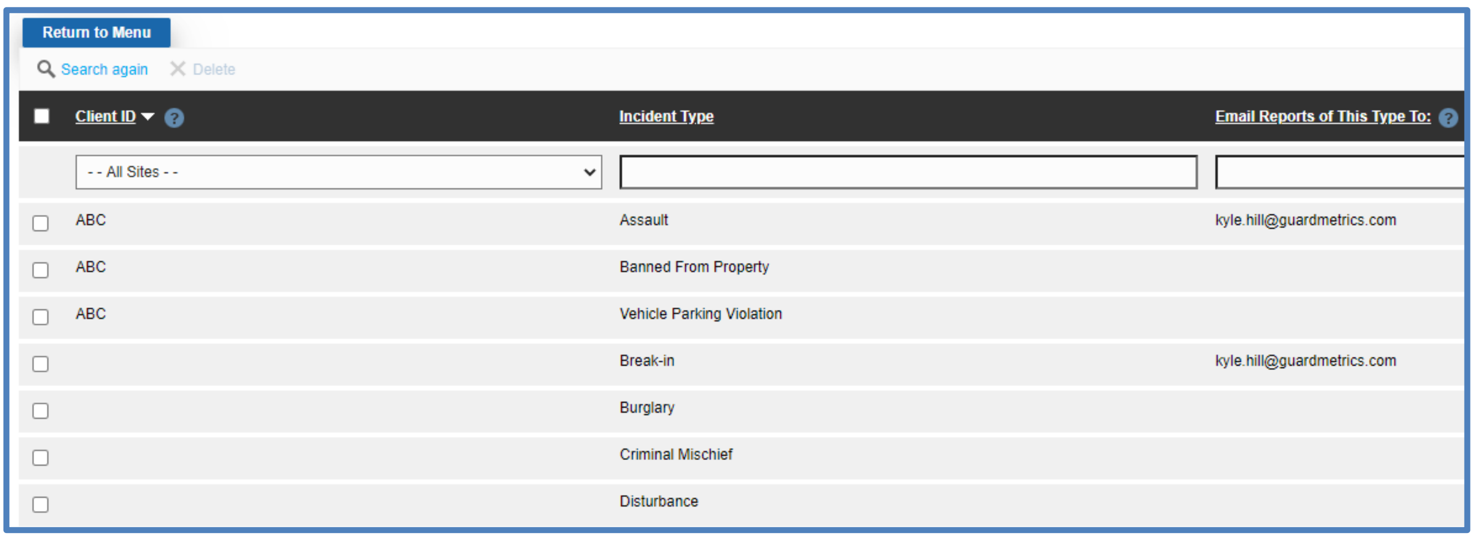
Recipient/Group	Email Address
Incident Reports	kyle.hill@guardmetricsfake.com
Perimeter Alert	gage@guardmetrics.com;steve.crosby@guardmetrics.com
Maintenance	gage@guardmetrics.com

BY-SITE ALERTS

Site Managers and Clients **CAN** be listed under By-SITE Alerts to receive an Incident Report in real-time.

INCIDENT REPORT TYPES




Return to Menu

Search again Delete

Client ID	Incident Type	Email Reports of This Type To:
- - All Sites - -		
ABC	Assault	kyle.hill@guardmetrics.com
ABC	Banned From Property	
ABC	Vehicle Parking Violation	
	Break-in	kyle.hill@guardmetrics.com
	Burglary	
	Criminal Mischief	
	Disturbance	

Client I.D: Selecting a Client I.D. means that you are creating a special <u>set of Incident Types for that client;</u> *Assault, Banned From Property* and *Vehicle Parking Violation* are the only Incident Types for the client "ABC", in the example above. Any Incident Types created without selecting a client I.D. are the default Types for all other sites.

Incident Types: These are the menu items from which a field officer may choose when submitting an Incident Report from the field. Click the "Add or Edit Incident Types" button (to the right, not pictured) and then add or edit Incident Types.

Email Reports of This Type To: You can list email addresses, separated by a semi-colon, for anyone who you wish to receive a <u>real-time Incident Report for that specific Incident Type</u>. In the example above, Kyle will receive Assault Incident Reports for client ABC, and he will receive Break-In Incident Reports for ALL other sites.

ACTIVITY TYPES

Activity Types are the menu items from which a user may choose when submitting an *Activity Form* from the field. For example, items might include "Foot Patrol", "Lock Check", etc. Click the "Add or Edit Activity Types" button and then add or edit items in the same manner as with Incident Types, explained above.

Client I.D: Like the previously addressed INCIDENT REPORT TYPES, selecting a Client I.D. means that you are creating a special <u>set of ACTIVITY TYPES for that client</u>. Any Activity Types created without selecting a client I.D. are the default Types for all other sites.

Activity Type alerts can be PUSHED by the field officer to email groups created under "ALL-Site Alerts", explained in the first paragraph on page 38.

VISIT TYPES

Visitor Types: These are the menu items from which a field officer may choose when submitting an Incident Report from the field. Click the "Add or Edit Visitor Types" button (to the right, not pictured) and then add or edit Visitor Types.

Client I.D: Selecting a Client I.D. means that you are creating a special <u>set of Visitor Types for that client</u>. Any Visitor Types created without selecting a client I.D. are the default Types for all other sites.

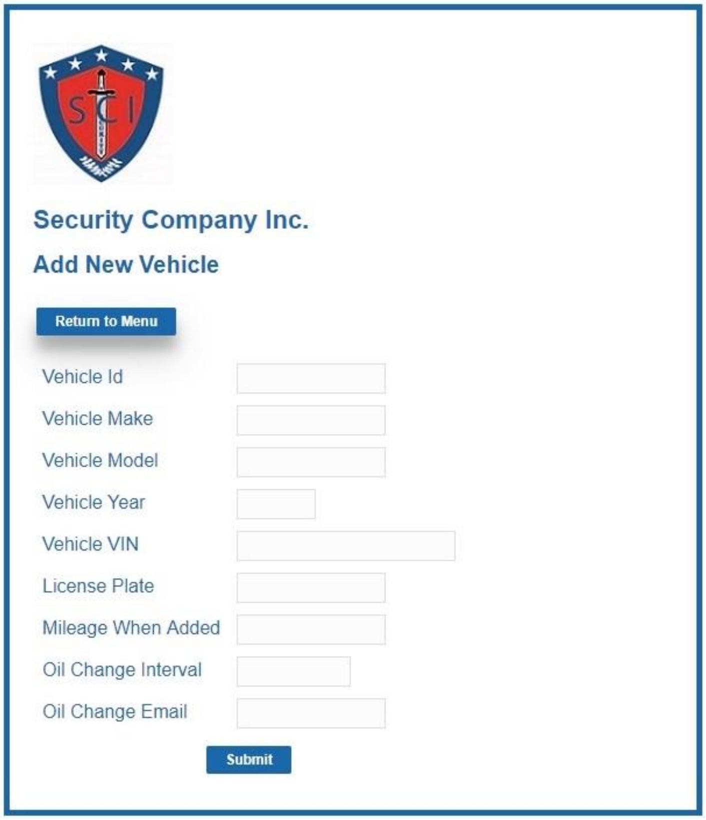
Email Reports of This Type To: You can list email addresses, separated by a semi-colon, for anyone who you wish to receive a <u>real-time Visitor Report for that specific Incident Type</u>.

PERSON/ VEHICLE REPORT TYPES

These can be edited in the same manner as the others and define the type PERSON on whom data is being collected. "Person/ Vehicle Reports" may be part of an Incident Report, or stand alone, as explained in the REPORTS section, previously.

ADD COMPANY VEHICLES

To add a vehicle to your system, so that your officers can perform various Reports explained in the previous REPORTS section, click the “Add Company Vehicles” button and this menu will appear. You can add as much or little data concerning the vehicle as you wish.

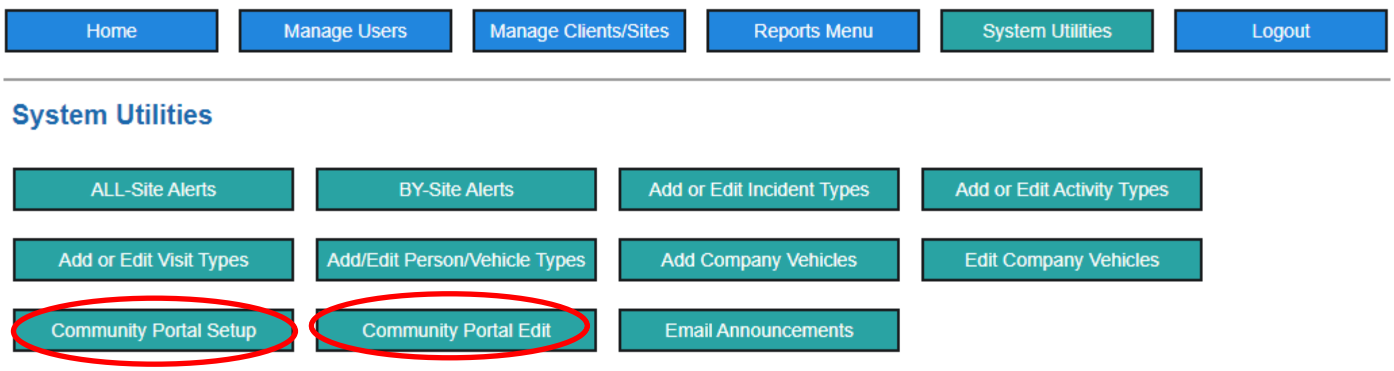


EDIT COMPANY VEHICLES

The “Edit Company Vehicles” button then brings up this screen, including all your vehicles that have been added. There are “Edit” and “Delete” functions on the right (not pictured)

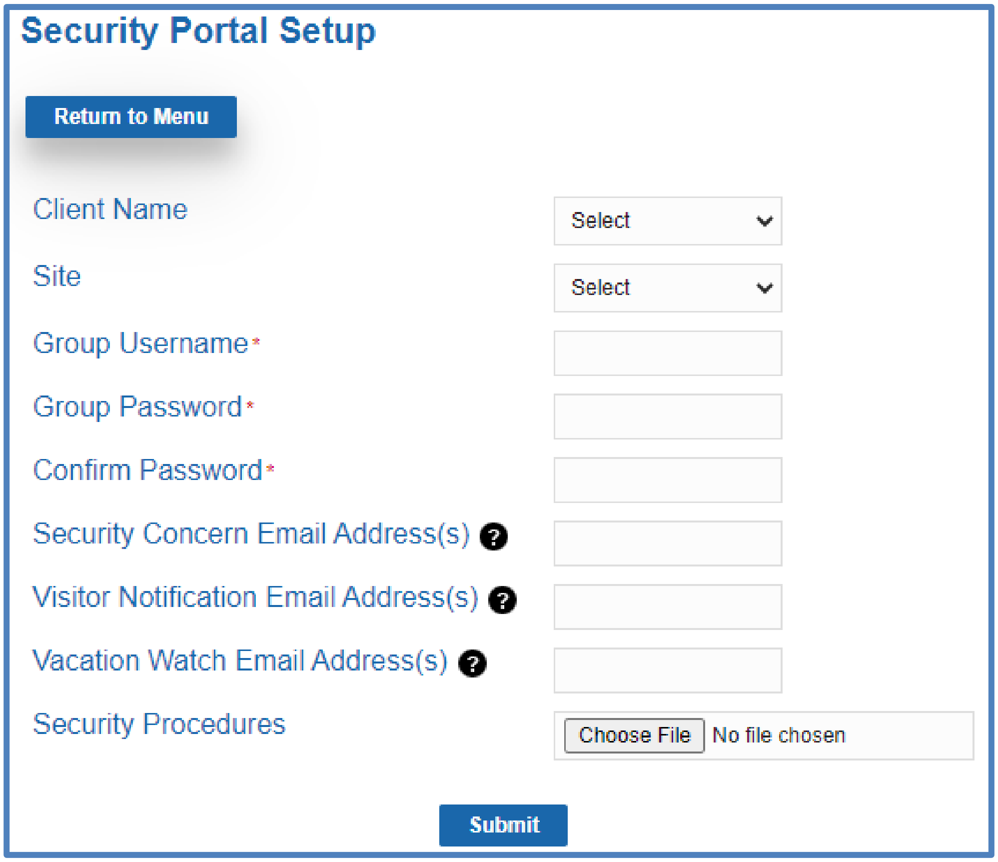
Vehicle Id	Vehicle Make	Vehicle Model	Vehicle Year	Vehicle VIN	License Plate	Mileage When Added	Oil Change Interval	Last Oil Change	Next Oil Change	Current Mileage
001	Nissan	Pathfinder	2017	AE1254L6589	NY 12564	12564	7000	42000	49000	62100
002	Infinity	G35X	2015	KH123LO895	NY 435j7	35890	5000	45000	50000	46000
003	Ford	F 150	2018	FRDP15426985KLD5	OH 526JKD	4215	5000	12500	17500	
004	Ford	Focus	2011	DJAI458NR44	NY 1254	65123	5000			

COMMUNITY SECURITY PORTAL SETUP



As explained above in the Community Security Portal section under “Reports”, the Community Security Portal is intended for customers who wish to provide an “electronic neighborhood-watch system” to a client, including SECURITY CONCERN, VISITOR NOTIFICATION and VACATION WATCH.

To set-up the “Community Security Portal” for a client, click the first button shown above and this menu will appear:



Security Portal Setup

Return to Menu

Client Name	Select
Site	Select
Group Username*	
Group Password*	
Confirm Password*	
Security Concern Email Address(s) ?	
Visitor Notification Email Address(s) ?	
Vacation Watch Email Address(s) ?	
Security Procedures	Choose File No file chosen

Submit

Click the Client and Site dropdown menus to choose the name of the site that you wish to set-up. Choose a group username that will be easy for a resident or employee to remember (a suggested formula is just using the Site name). Then choose a password that, again, is easy to remember. Only the password is case-sensitive. The same credentials should be passed out and used by all the residents/employees at that site.

The email alert (which, you should set your phone up to receive) can go to an individual's address on your team, or to multiple addresses simply separating each with a semi-colon "**;**". Those persons with access to the email alerts should be those persons related to that location; such as officers, site supervisors, main management, etc.

Once a Community Security Portal is set up in the system, your client can distribute this link: www.guardmetrics.com/community_security_portal/ to allow their residents or employees to send your team alerts in real-time. Upon request, we can also provide your webmaster with the code to add this, or any of the login portals, to your own site.

Your Support contact at GuardMetrics will have supplied you with an all-inclusive letter/template, to introduce the “Community Security Portal” to your client, in an email when you initially trained. Please contact Support if you cannot find the letter/template.

COMMUNITY SECURITY PORTAL EDIT

To edit a Community Portal, click the menu button, then, on the following page, click the “Search” button to view and edit the portal credentials.

OPTIONAL SYSTEM FEATURES

The GuardMetrics system has been designed to be as user friendly as possible. For that reason, the system includes many features which can be turned on or off at a customer's request; so that your Management Portal is as clean as possible and only includes the functionality that is important to you.

Many of the features have already been mentioned herein, but there are other specialty reports like "**Patient Transfer**" and "**Armored Car**", etc., as well as features like…

- A "**Lost & Found Log**"
- An "**Employee Handbook**" button that we can add to your officer's Mobile App.
- **Alarm Response**, and even a "**Disable Submit**" option that, on top of the Perimeter Alert email your selected group of Managers will receive when, according to GPS, an officer is not where they should be, this function disables their ability to submit any reports if they are not within the set radius of a checkpoint.

…and much more. So just ask if you need other functionality and it may well already exist. If it does NOT yet exist, you can click on the same "**CONTACT SUPPORT**" button in the upper right of your Management Portal as you do to get to the User Manuals, and click on this link to **REQUEST CUSTOMIZATION**.

FREQUENTLY ASKED QUESTIONS

Why can't I log in?

Passwords are case sensitive, make sure your Caps Lock is off, and your smart device is not automatically capitalizing the first character in the password field.

How can I reset a user's password?

On the main menu, click on the "Manage Users" tab. Click on "Edit Users", choose the users name on the dropdown menu and Click the "Search" button. Click the "View/Edit Details" link on the right. You can enter a new password without knowing the current one. When you're finished, click the "Save" button to save the changes.

Why am I getting large GPS variances?

When you enter a new client, site, or checkpoint, the system geocodes it based on the street address. On the main menu, click on the "Manage Clients/Sites" tab and then on the "Report" tab. Then click the "Search" button. On the right, next to each site or checkpoint, click the blue "View Details" link. You will see a satellite map with a bubble placed in the middle of the property, based on its street address. Grab the button and move it to the exact position of the checkpoint. Release the mouse and click the "update" button at the bottom to save your changes. This should reduce the variances you see on the reports.

Why am I getting Perimeter Alerts when the officer is on site?

This can occur for a couple reasons:

1) The officer does not have their **location services** on, so GPS does not know where they are. You can check by clicking on "View Details" to the right of any submission to see if there is a satellite photo or not (or if it shows the officer somewhere else).
2) The Perimeter Alert is set too tight around that site or checkpoint for GPS in that area, which can be edited through "EDIT CLIENTS" to the right of each checkpoint.

3) The officer's device is not giving an accurate GPS signal (perhaps due to a cheap, damaged or older phone).
4) The officer is not where they say they are.

How come the satellite photos are not appearing on the "View Details" link on the reports?

The field user does not have their "Location Services" turned on. Click Here for instructions on turning location services on iPhones, or Here for Android devices.

Why can't I find the Discipline Report under the Reports tab?

The Discipline Report can be found under the "Manage Users" tab. The reason for this is to maintain confidentiality since only a security level 1 user can access this section.

How do my customers receive daily reports?

The easiest and most beneficial method for your customer is the "Client Portal", explained here: Add a Client Portal User.

Can I email a report?

When viewing a report, click the "Print Report" button on the right. In most browsers, the next window will allow you to select a different printer. Most operating systems include a PDF writer of some sort, or include a "Save as PDF" choice. After naming and saving the file, Adobe will automatically open with the report. On the upper left, click on
File/Send File/Attach to Email.

Can I Send Auto-emailed DARS or Shift Reports

Yes. Simply send an email to support@guardmetrics.com indicating which email address(es) should receive the DAR for which site.

Can my clients access the Management Portal Menu?

No! They can, however, view a limited report menu, for only their sites, in the Client Portal. Click Here for instructions on adding a Client Portal User.

How can I edit a Daily Activity Report (DAR)?

You can edit each line item by going to the "Officer Activity Report" and clicking on "View Details" on the item you would like to edit. Be sure to click the "Update" button at the bottom to save your changes.

When I add a user, what does the "Restricted" checkbox mean?

When adding a level 2 through 4 user, you may want to limit the clients and sites that appear on the drop-down menus on the various activity forms in the mobile app. When this box is checked, and you click Submit, you are redirected to a screen where you can choose the clients and sites an officer is allowed to see. Click Here for more information.

Why are all my client sites showing up in the Mobile App?

If you currently have your officers assigned a security level 2 – 4, they will be able to see all client sites in their drop-down box on the mobile app, unless you manually restrict them, as described in the previous Frequently Asked Question. The best solution for officers that regularly work at different sites is our SITE-LOCK feature security, which is automatically activated by changing their security level to level 5. For more information on our SITE-LOCK feature, click HERE.

Can I enter my own sites?

Yes! Simply click on the "Add Clients/Sites" tab in the "Manage Clients/Sites" menu. If you have several clients, sites or checkpoints to add, we can import them for you very quickly. Click on the "Support" button at the very top right of the Main Menu for the support number to call.

How do I quickly remove an ex-employee’s access to the system?

In the “Manage Users” menu, click the “Edit Users” tab. Then choose the employee’s name from the drop-down menu and click Search. On the right, next to the employee’s name, you will see a blue “View/Edit Details” link. Once clicked, you can UNCHECK the “Active” box and click “Save” at the bottom.

Can I create and print my own Checkpoint QR Codes/Tags?

You can add check points on the “Add Checkpoints” tab under the “Manage Clients/Sites” menu. Click Here for more information. Once the checkpoints are in the system, simply click the next consecutive button, “Request QR Codes” and fill in the couple fields. Support will provide you with the codes in a PDF file formatted to print perfectly on Avery label template 5520. Simple instructions for printing on the templates will be provided in the email accompanying the PDF file.