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ActivitySuite.com
Quick Start Tutorial

Overview

Thank you for taking time to check out ActivitySuite.com – a "fully-integrated network solution" for private patrol operators. We strive to provide a complete set of daily activity reporting and management tools – and everything being 100% browser-compatible[1]

ActivitySuite is very easy to use. But like any tool with even a modest depth of sophistication, it takes a minimal effort to set up and configure. As you work through this tutorial, you will accomplish the following:

- Configure some important **Company Settings**
- Create a sample **Client Site** and a few **Incident Types**
- Create a site **Bulletin**
- Enter a couple of **Activity Logs**
- Generate a PDF **Report** and **email** it to your sample client

Before starting this tutorial, you must first create an account on the *ActivitySuite* web site. If you do not have an account, go to http://www.activitysuite.com and click the "Begin Free Evaluation" link under **Resource Links**. Fill out the form and click "Create Account". You will be guided through the registration process.

When your account is initially created, you are assigned "Administrator" privileges. It gives you access to all areas of the *ActivitySuite* web site. When you are ready to deploy *ActivitySuite* within your organization, you will add users to your Company and choose their roles (levels of access). But for now, you will explore the capabilities of the web site as an administrator.

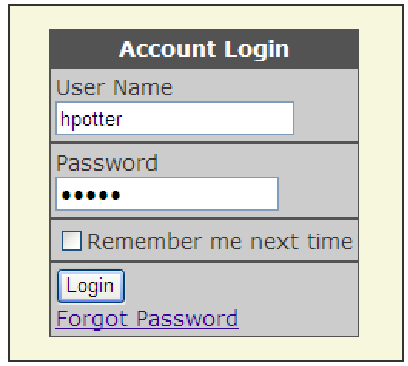
If you have not already done so, log in to the *ActivitySuite* site. There is a link on the home page that will take you to the login screen.

[1] GPS and other hardware-related options may require supporting software to be installed on the user's local computer

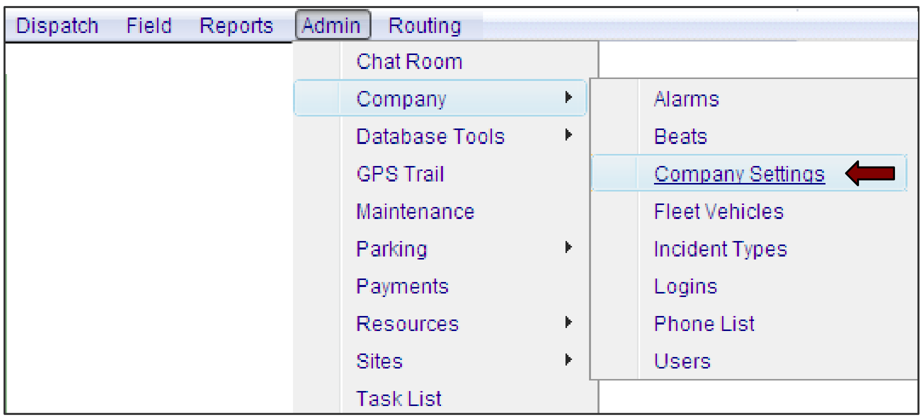
On the login screen, enter your User Name, Password and click the **Login** button.

If you bookmark pages on the site, you can return to those pages without having to login by checking “Remember me next time”.

After logging in successfully, a menu bar will appear providing access to the major areas of the *ActivitySuite* site. Hover the mouse over the **Admin > Company** menu item to see company-related menu commands.



Log into the Web Site



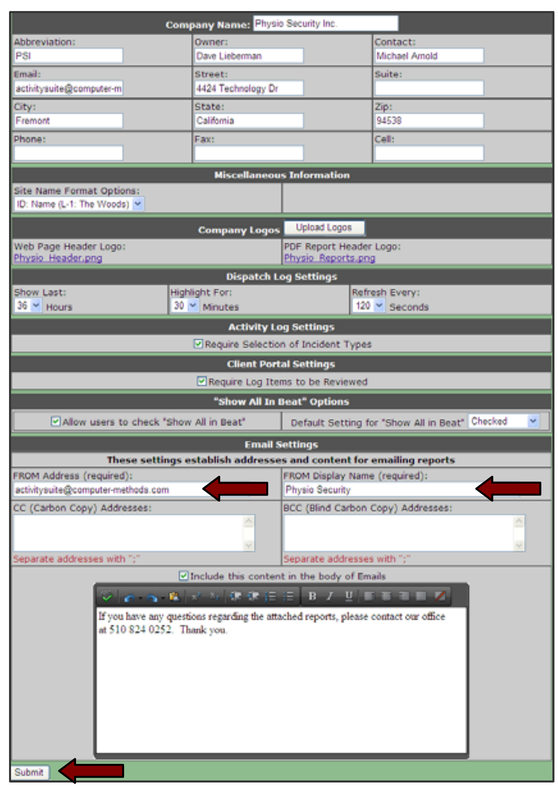
Administrator’s Menu Commands

For this tutorial, we need to configure some of the Company settings to successfully produce crisp, professional client reports. Move the mouse cursor over **Company Settings** and left-click.

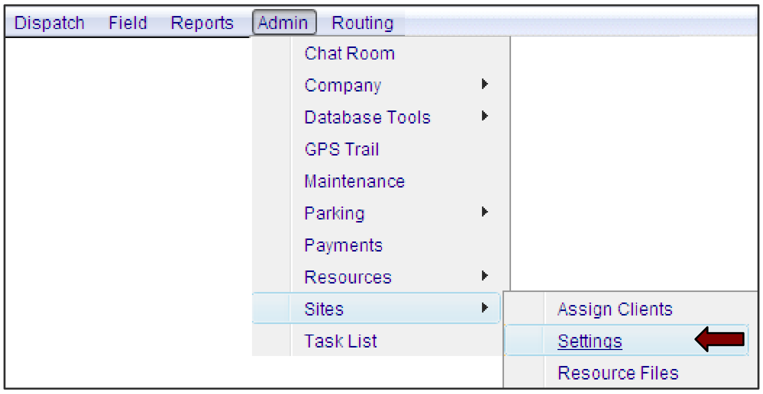
This is a thumbnail of the **Company Settings** screen. The settings we are concerned with in this tutorial are the Email Settings (highlighted). Before emails can be sent from your Company, you must provide a “From” email address and “Display Name”.

The **From** email address must be a legitimate email address for your company. The **Display Name** can be any text string and will appear as the sender’s name in emails received by your clients.

After you enter a **From** email and **Display Name**, click the **Submit** button to save your settings.



Company Settings Screen



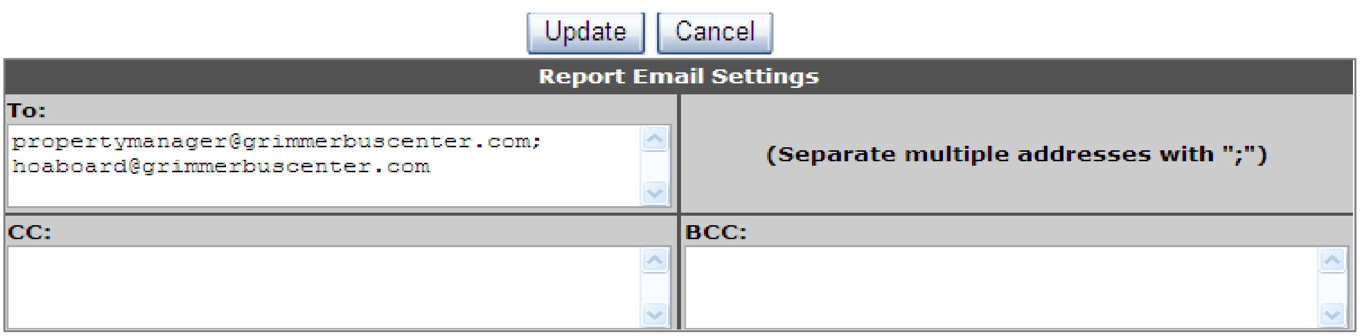
Site Management Menu Commands

The next step is to create a client site. Move the mouse cursor over the **Admin > Sites > Settings** menu item and left-click.

Adding a New Site

Your database will not have any sites. Click the **New Site** button and enter a shorthand notation and full name for your site. Click the **Add Site** button to continue.

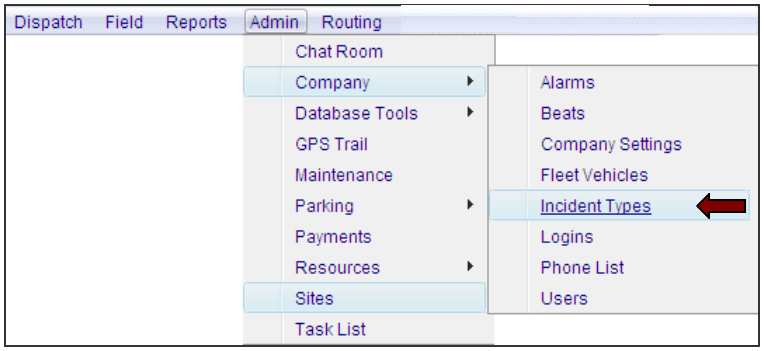
***Tip**: You can control the way Site IDs and Site Names are displayed to users on the **Company Settings** screen.*



***Report Email Settings** Snippet from the Site Settings Screen*

A configuration screen with a variety of site settings will appear. Find the section titled, "**Report Email Settings**". You must provide at least one email address in the "**To**" address section. This is the email address of the client that will receive the report. You can place multiple addresses in the box by separating them with the ";" character.

You can also specify email addresses for the Carbon Copy (CC) and Blind Carbon Copy (BCC) fields. A recipient in the BCC field will receive the email but their address will not appear in the email itself. When you are finished, click the **Update** button to save your settings in the database.

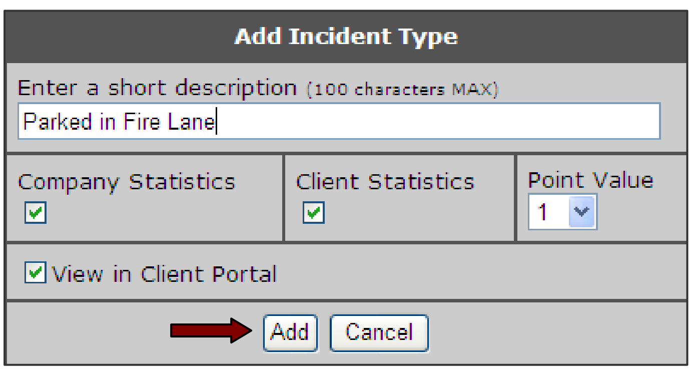


Incident Types Menu Command

The next step is to create a few incident types. Incident types help you categorize you activity logs and are important for statistical reporting. Move the mouse cursor over the **Admin > Company > Incident Types** menu item and left-click.

The **Incident Types** screen shows you a list of the currently defined incident types. Create a new type by clicking the **Add New** button.

List of Currently Defined Incident Types

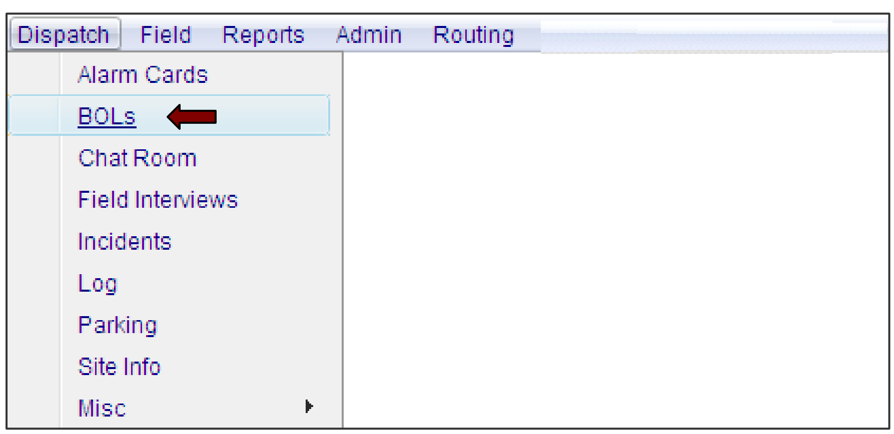


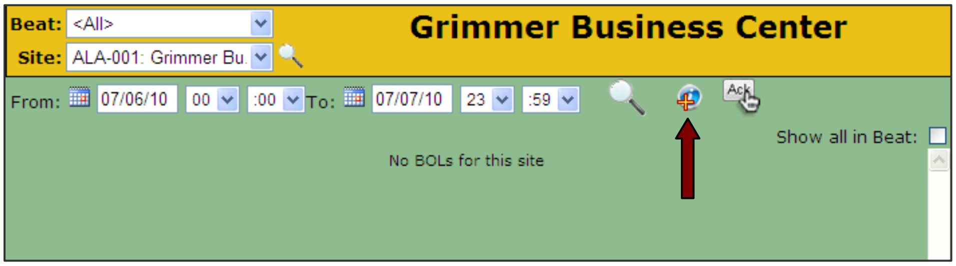
Defining a New Incident Type

Enter a description of the incident type and click the **Add** button. The other settings are not important for now and can be configured at a later time.

***Tip**: You can control how incident types are tabulated for statistical reports. You can also hide company-related incident types from being viewed by clients.*

Next, we will create a bulletin (BOL). BOLs are managed from the dispatch menu. Click on **Dispatch > BOLs**.





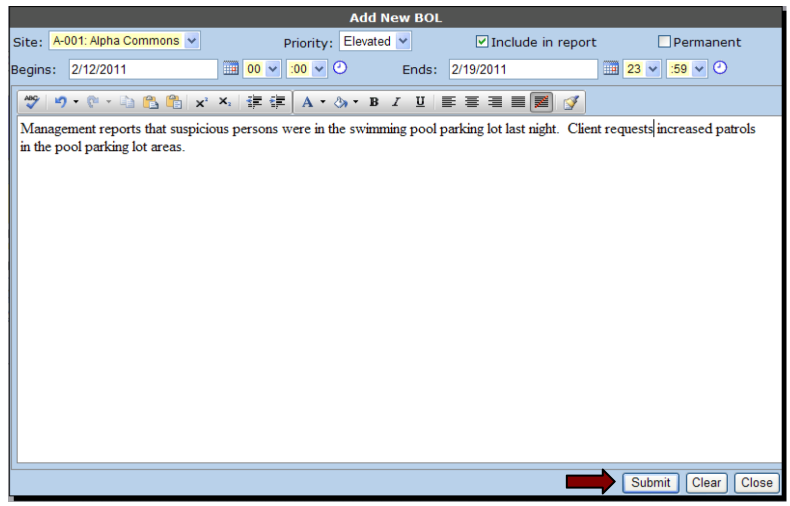
Click the Icon to Add a BOL

This screen displays the site BOLs in effect for the indicated date range. To add a new BOL, click the icon.

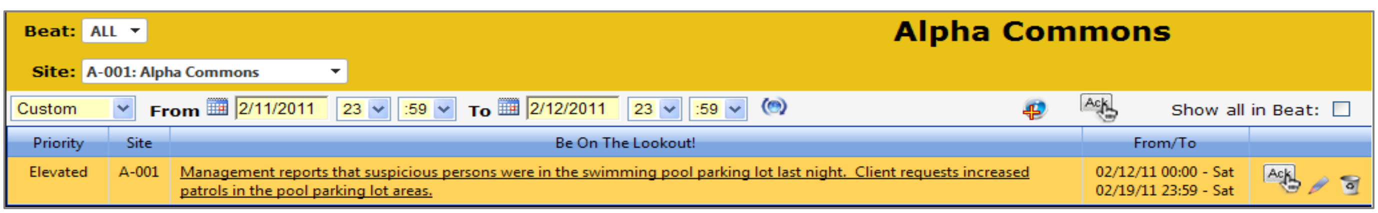
Set the date range for period when your BOL should be active. Type in the text of your bulletin into the text area and click **Submit**.

***Tip**: The priority you assign to a BOL controls its color and the order in which it is presented to Field users.*

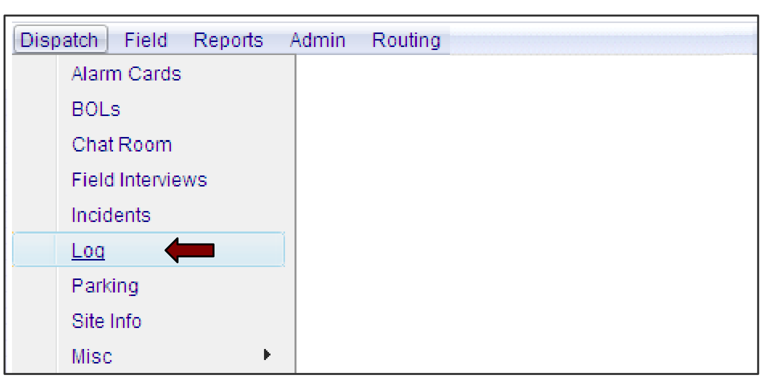
***Tip**: Don't forget to use the **ABC** Spell Check button!*



Entering a New Bulletin (BOL)

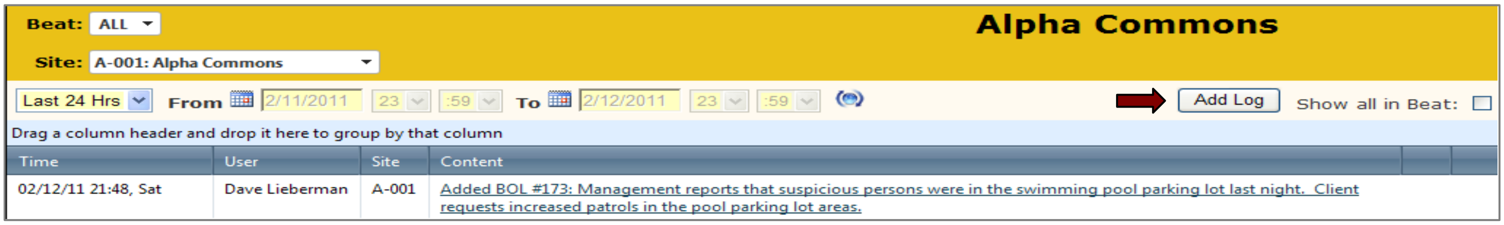


The BOL has been added for the site.



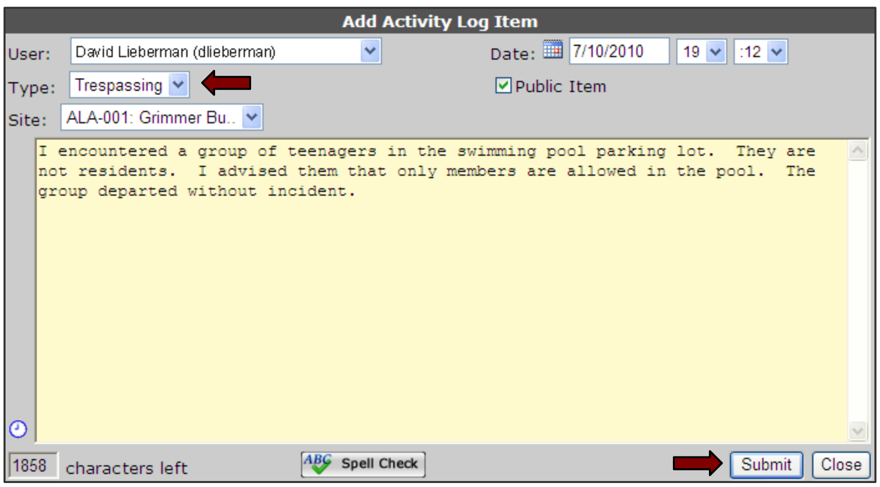
Selecting the Log Menu Command

The next step is to add log items to the site. Logs can be added from either the Dispatcher or Field menus. Move the mouse cursor over the **Dispatch > Log** menu item and left-click.



Adding a Log Item

Click the **Add Log** button to add an item to the daily activity log.

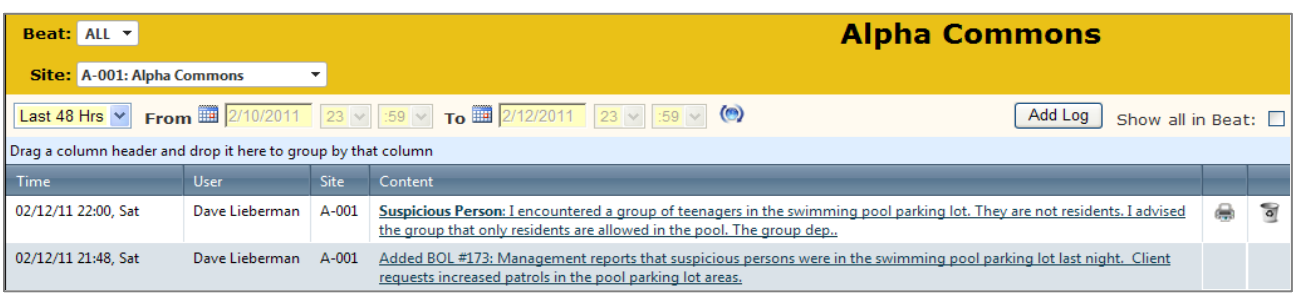


Entering the Content for a Log Item

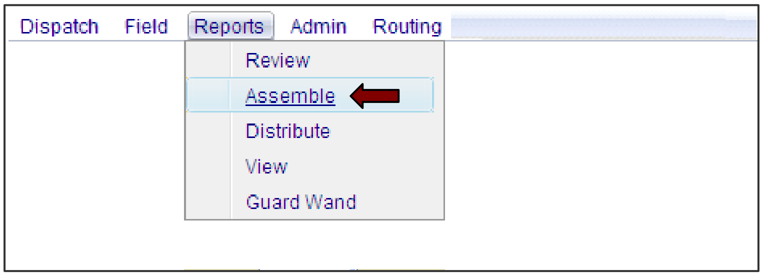
Select an incident **type** using the dropdown list. Type in the text of your log content and click the **Submit** button.

***Tip**: Don't forget to use the **Spell Check** button!*

***Tip**: You can make a log item private by un-checking **Public Item**. Private items are not included in client reports.*



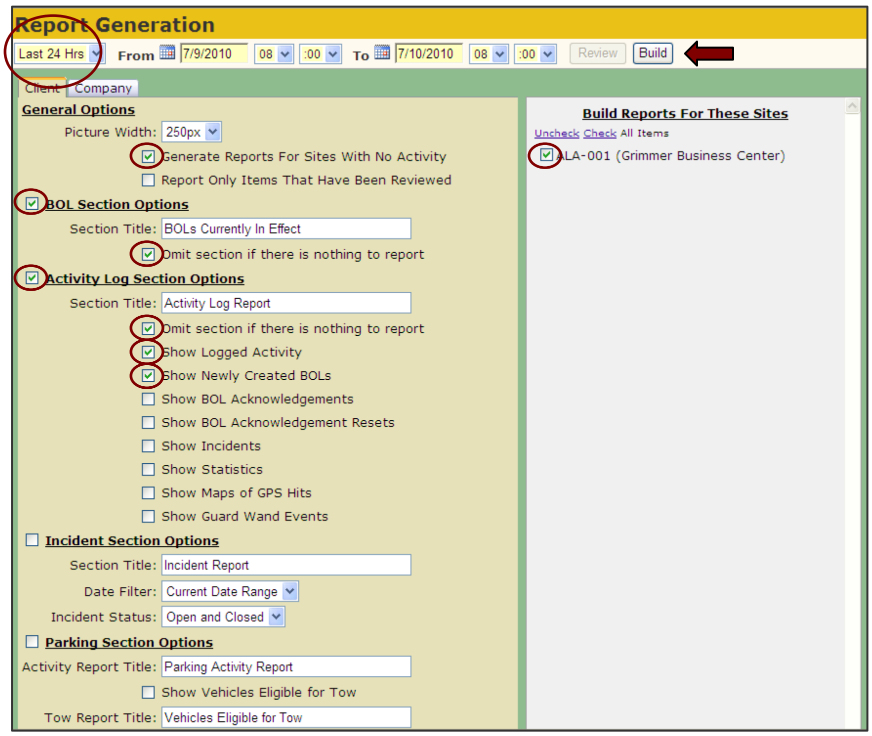
The log item has been added to the site. Note that the creation of the BOL was also logged.



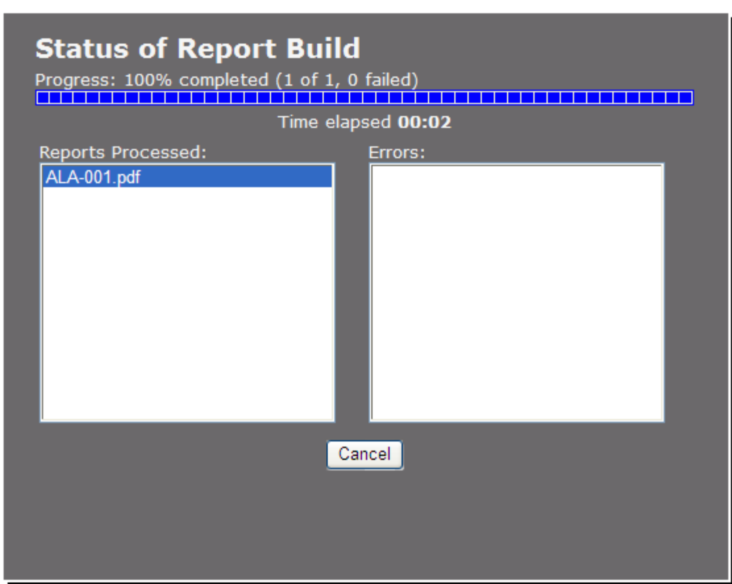
Selecting the Assemble Menu Command

The next step is to build a client report. Move the mouse cursor over the **Reports > Assemble** menu item and left-click.

Report options provide the administrator with control over the content in reports. Verify that the options on your screen match those highlighted in the screen snapshot. Then click **Build** to create the report.



Settings to Build a Client Report



Report Generation Progress Screen

During the build process, a status screen will update the progress of the reports being created. Any problems are reported in the **Errors** section. If all of the reports are created successfully, the **Reports Distribution** will appear.

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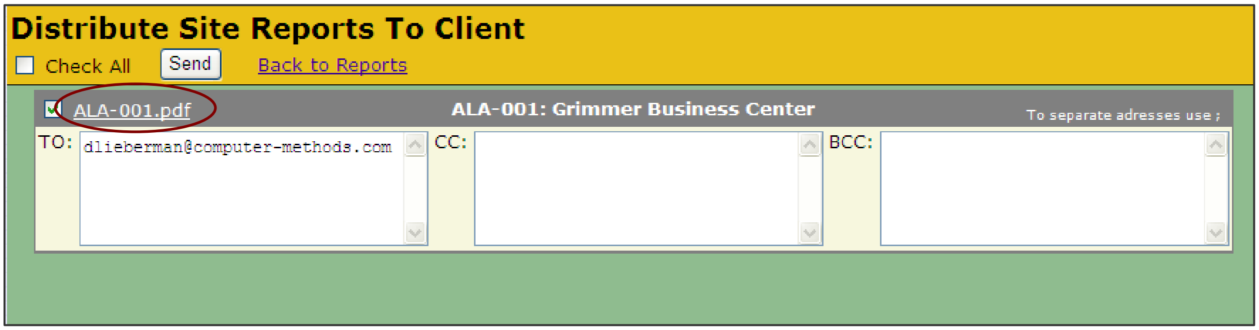
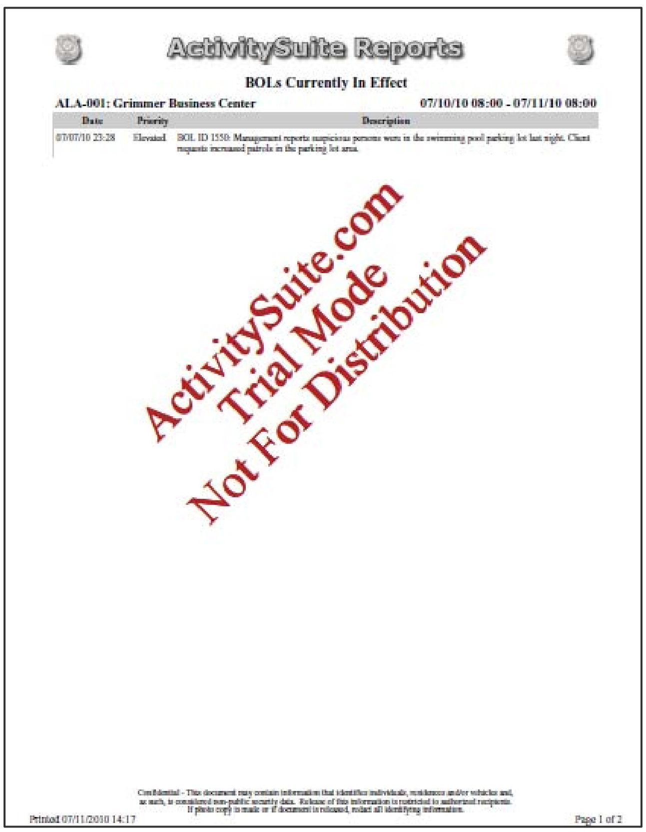
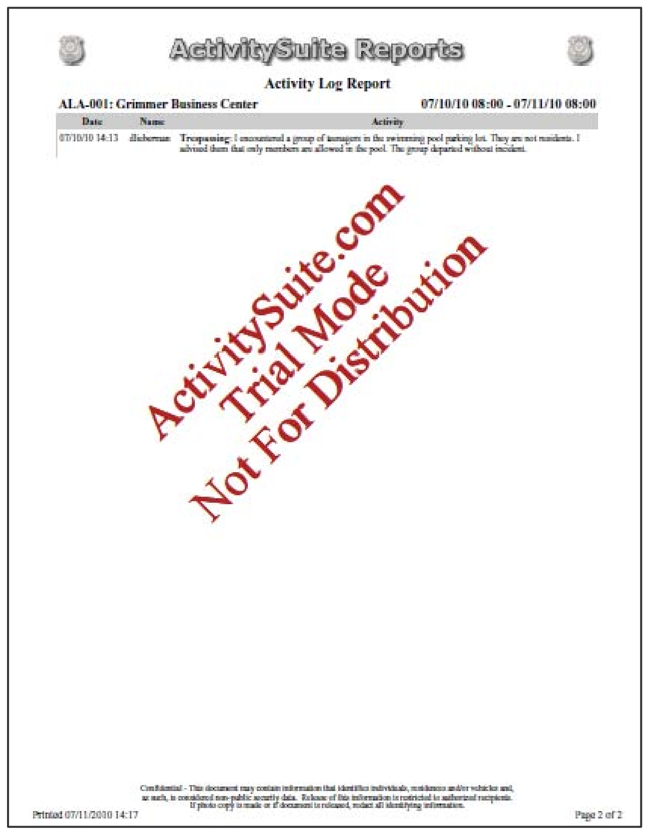


Report Distribution Screen

Client reports are created in PDF file format. Click on the report file link to preview the client report. You can email the report to the addresses in the "**TO:**" box by clicking the **Send** button.



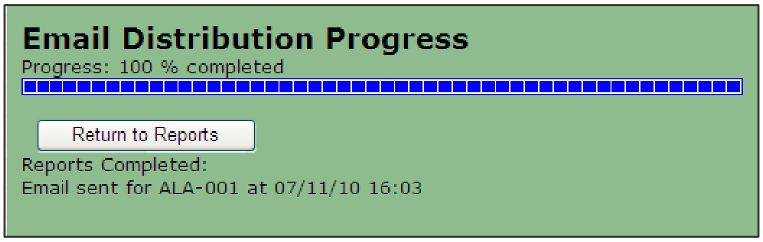
Page 1 of Client Report



Page 2 of Client Report

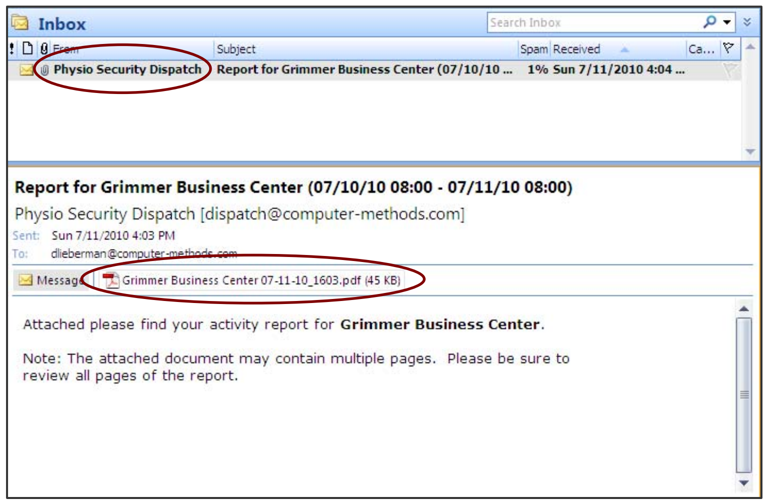
Tip: *The **Trial Mode** watermark does not appear when you are an active subscriber to ActivitySuite.com*

Tip: *You can add additional email addresses in the **TO**, **CC** or **BCC** address boxes*



While sending emails, a status screen shows the progress of email distribution and lists the site reports that have been successfully transmitted by the server.

This is a screen snapshot of an email inbox that has received the Client Activity report. Note the display name you configured in the **Company Settings** screen appears in the **From** address field. The report is attached in PDF file format.



Congratulations! You have completed the ActivitySuite Quick Start Tutorial.

If you have questions about **ActivitySuite** or would like to schedule a training session, please call **David Lieberman** at **866 625 9091**.