



Application Guide

for

ActivitySuite.com

Fremont, CA

E-mail: support@activitysuite.com

Phone: +1 (510) 824 0252

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Introduction

This guide provides general information and insights into the operation of **ActivitySuite** – a web-based application for Private Patrol Security Companies (PPO).

The **ActivitySuite** web application provides these basic functions:

- ✓ Logs field activities for patrolled sites
- ✓ Organizes the logs in a central database
- ✓ Allows for review of the logged activity
- ✓ Generates client activity reports (in PDF format) for each site
- ✓ Emails the site reports to a distribution list

When an account is first created, the option settings are configured (by default) for simple and straightforward operation. However, there are many settings that can be adjusted for enhanced functionality.

The purpose of this guide is to orient you to the various components of the **ActivitySuite** system and to fine-tune the site to best meet the specific needs of your organization.

It is assumed that you have already created your Company profile that includes a user account with administrator privileges. As an administrator, you will configure sites, beats, and company settings. You will also add additional users and determine their level of access.

If you have not yet created your Company profile, go to www.ActivitySuite.com and click on the **Begin Free Evaluation** link in the **Resources** section.

Trial Mode

New accounts are created in *Trial* mode. A banner will scroll across the top of the screen to remind you that *Trial* mode is active. You will be able to experience virtually all of the capabilities of the web site in *Trial* mode. However, there are some restrictions:

Login Hints

Each time a user logs in; a pop-up window will appear with hints about using the web site.

Watermarks

Reports generated by the software are watermarked with “ActivitySuite.com – Not For Distribution”.

GPSMonitor

ActivitySuite provides a special application called **GPSMonitor** that connects to a GPS Receiver and continuously uploads GPS data to our servers. However, the **GPSMonitor** tool is disabled in *Trial* mode. Instead, a sample GPS dataset with the user name “GPSDATA” will become visible on the *GPS Trail Review* page so you can view GPS history and display a GPS trail.

Activation



The *Trial* mode restrictions will be removed when you purchase a subscription. You can pay on-line at any time by selecting **Admin > Payments** from the menu bar. When your payment has been processed, your account will automatically activate.

How to get started

Use the Video Tutorials

The **ActivitySuite** Home page contains an area with **resource** links. There you will find a link to the **Walk-thru**. The walk-thru is a set of video tutorials that will illustrate some basic maneuvers:

- How to create a Company Profile and User Account
- How to publish BOLs (Be On the Lookouts)
- How to post field activity logs
- How to create a client activity report
- How to email reports to distribution

User accounts

Creating User Accounts

You can create Users by selecting **Admin > Users** from the menu bar and clicking the **Add Users** button. A User can change his or her own password after they log in.

Assigning Roles

Users are assigned “roles” that determine the level of access that a user will have to the web site. A User can be assigned one or more roles as is deemed appropriate by the company administrator:

Role	Description
Administrator	Enables access to the Admin menu
Dispatch	Enables access to the Dispatch menu
Officer	Enables access to the Field menu
Reports	Enables access to the Reports menu
Router	Enables access to GPS and Routing menu items

Sites and Beats

Creating Sites

You can create Sites by selecting **Admin > Sites** from the menu bar and clicking the **New Site** button. The content for the following fields should be entered carefully:

Field Name	Description
Address	Used by the mapping functions to geocode the latitude and longitude of the site's location. This affects the accuracy of the site map.

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City	(Same as above)
State	(Same as above)
ZIP	(Same as above)
Report Email To	Determines the "To" email address when reports are emailed. Can be left blank.
Report Email CC	Determines the "CC" email address when reports are emailed. Can be left blank.
Report Email BCC	Determines the "BCC" email address when reports are emailed. Can be left blank.

Managing Beats

You can manage Beats by selecting **Admin > Beats** from the menu bar. Using beats is optional. You do not have to define any beats in order to use **ActivitySuite**. However, if you do organize your patrols by beat, you can easily associate your field sites the beats that you create.

It is highly recommended that you first define all of your sites. It will make it easier to organize the beats.

Once you have assigned sites to your beats, the beat names will appear on the Dispatcher's and Field Officers screens. The dispatchers and officers will have the option of displaying all of the company sites, or just focusing on the sites assigned to a selected beat.

Reporting

ActivitySuite has been designed with sophisticated technology to simplify the report generation process. With just a few clicks, it is possible to create and distribute your client activity reports. There are a number of settings that control the reporting process. These settings are stored in your company profile, so once you have it set up the way you want it the settings will not change.

Report Settings

You can access your report settings by selecting **Reports > Settings** from the menu bar. The checkboxes control what report elements are to be included in the client report. After the desired settings have been checked (or unchecked), choose the date range and click the **Build** button to start the report generator. Feel free to experiment with the settings until you arrive at the format that suits your needs.

The Review Process

One of the checkbox settings on the Client Reports screen is **Report Only Items That Have Been Reviewed**. When checked, the **Review** button will activate (next to the **Build** button). **YOU MUST REVIEW AND APPROVE ALL ITEMS** to be included in the report by clicking the **Review** button. A review page will appear and list every item to be included in your client activity report. You must check the boxes next to each item to approve it. Alternatively, you can click the **Check All** checkbox and then uncheck the items you do not want to approve. When your review is completed, click the **Submit** button and then click **Build** to generate your reports.

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If the **Report Only Items That Have Been Reviewed** checkbox is not checked, the **Review** button is grayed out and you can proceed directly to **Build** your reports.

Building Reports

ActivitySuite cycles through the field logs for each site and compiles a Client Activity report, writing it to a PDF file. Each site will have its own report in PDF format. The progress of the build process is updated as the reports are generated.

While infrequent, errors can occur during the build process. If an error does occur, an error message will be displayed for that report and the process will continue. The report builder will attempt to build reports for all sites. When the process is finished, a list of reports that could not be generated will be summarized on the screen. The server will automatically send an email to the **ActivitySuite** administrator with an error report. You will be contacted as soon as the issue is resolved.

If the report generation process completes successfully (with no errors), you will automatically be redirected to the report distribution screen.

Distributing Reports

The report distribution screen presents a series of panels that control the emails sent to clients. For each email, you can approve the report for sending and set the addresses of the To, CC and BCC fields.

The email addresses will pre-populate with the contents of the “Report Email To”, “Report Email CC” and “Report Email BCC” that were configured for the site. You can overwrite these addresses or simply add more to each textbox.

When the **Send** button is clicked, all of the reports are sent from the **ActivitySuite** SMTP server. The “From” email address will contain the email address and “Display Name” you specified in your Company profile. You can also have each report forwarded to a company email address for verification. You can change your Company settings by selecting **Admin > Company Info** on the menu bar.