NFC Africa

# Safeguard Web Portal Set-Up Tutorial

Version 3.0

# Contents

# 1. LOG IN

- To log into the system enter the URL [http://www.nfcafrica.com/clientname/web](http://www.nfcafrica.com/clientname/web). A credentials entry page will open as shown below

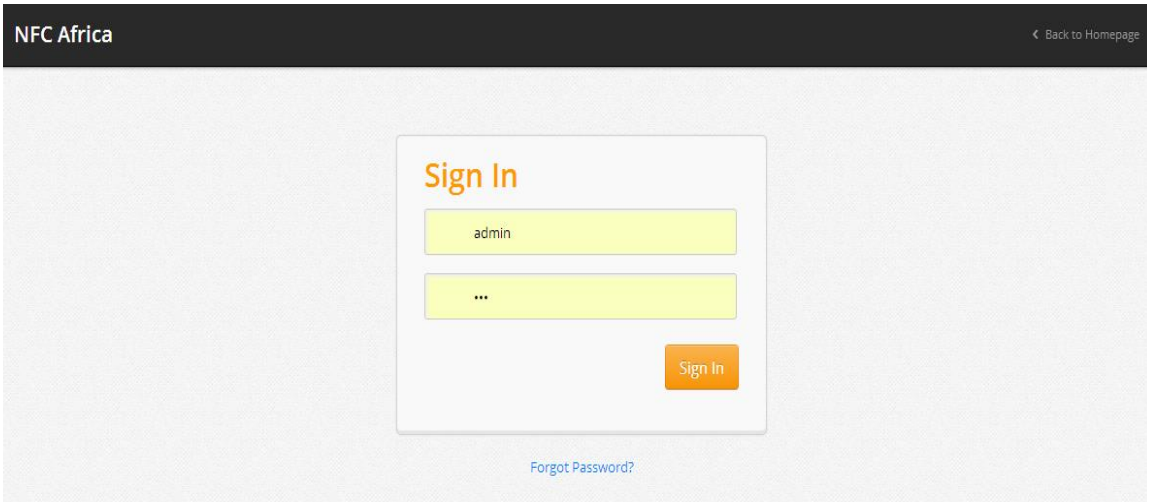



**Fig. 1.1 Log in screen**

- Enter the Username and Password allocated to you by the administrator from NFC Africa or from your organization
- When successfully logged in the system homepage will open with the menus visible based on the user rights allocated

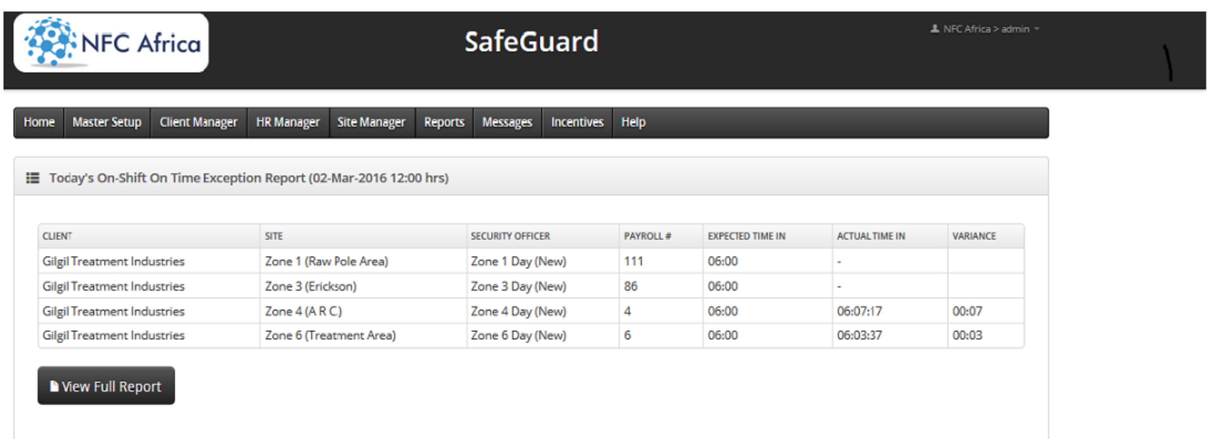



**Fig. 1.2 Homepage view**

# 2 CLIENT SET-UP

To set up a new Client in the system Click on the *Client Manager* menu item from the main menu

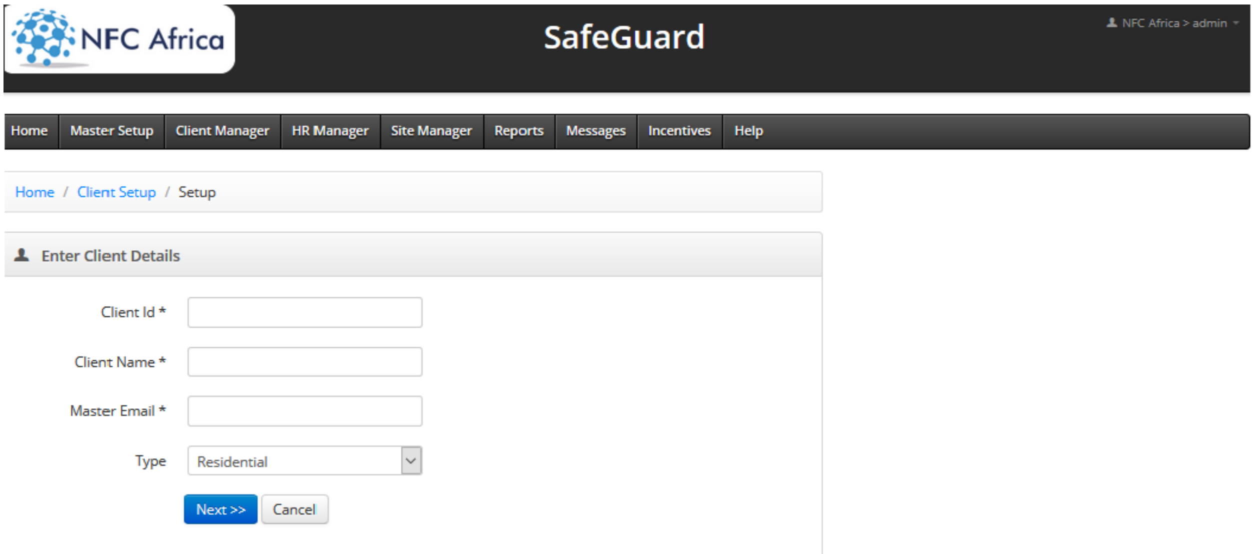



**Fig. 1.3 Client Set-up form**

- Enter the details requested
- The client ID is given by the system administrator
- The Email entered should be the primary email to be contacted on behalf of the client in case of any communication
- Click on the *Next* >> button.
- It will open the **Client Manager** to continue with the set-up

# 3.CLIENT MANAGER

This is the management screen that is used both for initial set-up of the client and the information related to the client.

From the client manager you have the ability to carry out the following functionalities

- Add a Contract using information from the NFC Safeguard Clients Service Contract
- Add a Site and associate it with an already entered contract in the system
- Navigate straight to the Site Manager with the already pre-existing filters on the site of choice
- View the listing of all patrol points and can filter to view specific patrol points using key words

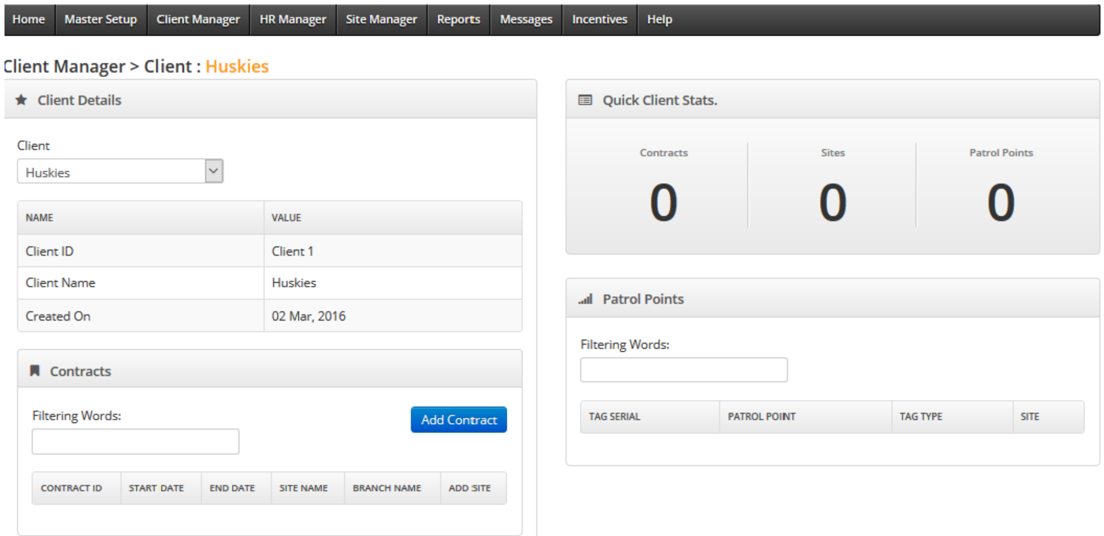



**Fig. 1.4 client set-up view**

## 3.1 To add a Contract using Site Manager

- Ensure the correct client is selected in the *Client ID*. If not, select the correct client and wait for the page to load fully before proceeding
- Click on the Add Contract button
- The contract details form pops up and you are able to add the details of the contract appropriately as shown below

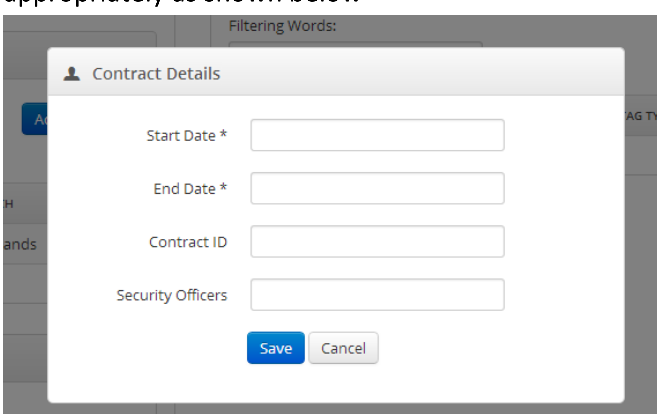



**Fig. 1.5 Contract details form**

**NB:** The contract ID is given by the originating entity of the contract.

- Click on save to save the contract details into the system
- The contract now appears in the *Contracts* section of the Client manager

## 3.2 To add site via the Client Manager

- Navigate to the specific contract to add a site to under the contracts section

- Click on the *Add Site* Link that is adjacent to the contract
- The add site pop up form
- Enter the details of the new site appropriately in the form as shown below
- Mandatory fields are indicated by a *. Contact details are useful to drive automated reports
- Scheduling – Automatic or Manual decision: this is an important decision which cannot be reversed or edited. Automatic site set up is primarily for simple sites with low complexity. Manual site set-up should be selected for more complex sites.

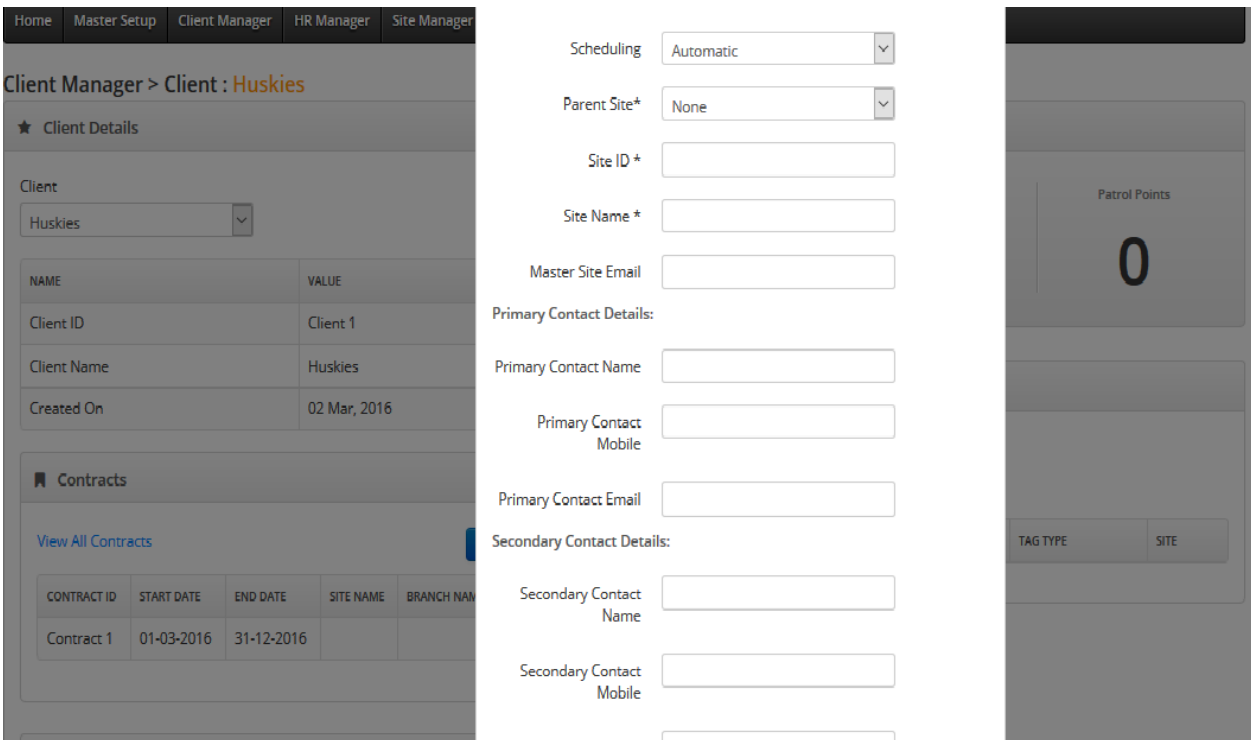



**Fig. 1.6 Site Details Form**

- If the site is a child of another site, select the parent site from the *parent* Site dropdown - otherwise **leave the choice as none if not applicable**.
- Enter the Site ID as it occurs from a source system, otherwise enter the NFC Africa site ID
- Select the branch to which the Site belongs (if need be consult with the administrator for guidance).
- Shift start offset: this function allows you to mandate a minimum amount of time in minutes after the start of a shift before which no patrols will be allocated (typically 10 to 15 minutes)
- Select branch: if you run a multi branch operation then you will need to create branches under Settings/Manage Branches and select the appropriate branch.
- Click on save to save the new site
- The site now appears under the *Sites* section in the Client Manager

- To proceed to manage your site and set it up with more options, click on the link *Manage Site* adjacent to the site that you intend to manage. This will open the site manager (See photo 1.7

**TIPS**

1. You can view quick stats about your client at any one point by looking at the *Quick client's stats* section in the client manager
2. You can filter a list using keywords by typing in any textbox written Filtering words in the client manager

## 3.3To navigate to the Site Manager from the Client Manager

- Click on *the Manage Site* Link adjacent to the site you want to manage

# 4.SITE MANAGER

The Site Manager is used to edit and manage the details and information of a site in the system. The site manager can be accessed in two ways:

- By clicking directly on the Site Manager from the main menu
- By clicking on the Client Manager from the main menu. Go to the Sites section and click on the *Manage Site* link adjacent to the site you wish to edit.

There are several functions that can be done from the Site Manager view:

- View and edit the site details of a specific site
- Add or edit shifts to a site
- Allocate (or edit) staff to a certain shift for a certain period i.e. rostering
- Allow you to add or edit patrol routes and patrol route sequences against the routes

## 4.1 To view the details of a site

- Under the *Client Details* section select the client ID if not yet selected
- Then proceed to select the specific site from the Site dropdown after the *Client ID*
- Click on the *View* button and wait for the page to load fully

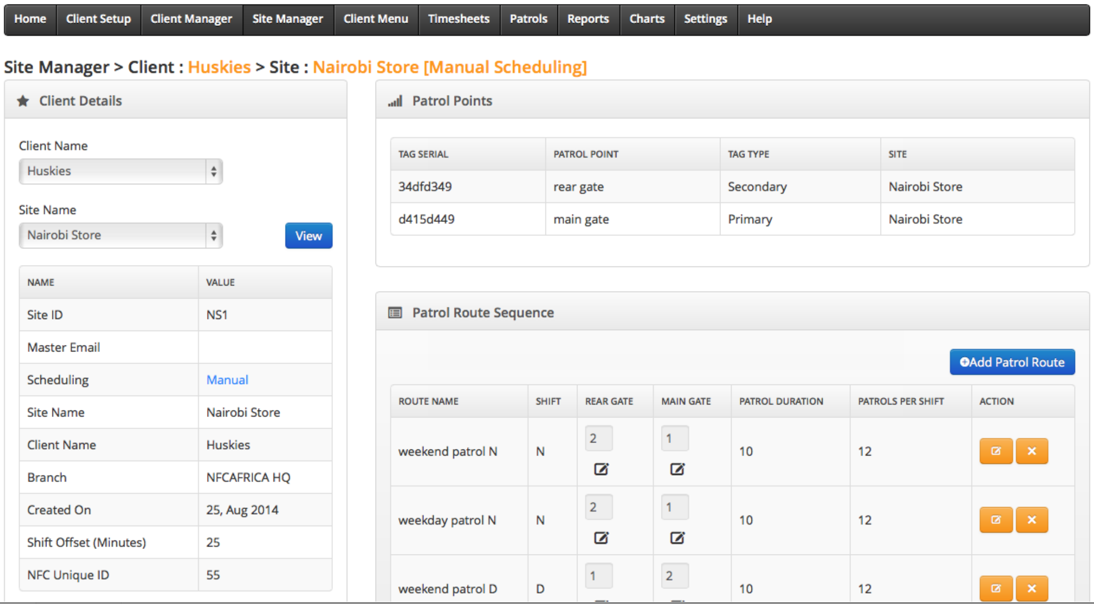



**Fig. 1.7 Site Manager View**

## 4.2 The NFC Unique ID

This is the unique system generated ID for the specific site that will be used by the NFC Africa system. This unique ID is crucial when setting up the primary point of the site via the mobile app as it will be used to authenticate the site name.

## 4.3Patrol points

- Primary and secondary patrol points are added via the mobile app. Refer to **NFC Africa Administrator Mobile App Tutorial version 3.0**
- The added patrol point should be listed under the *patrol points* section in the site manager view, the type will be listed as primary or secondary

## 4.4To add Shifts to a site

- Click on the *Add shift* button under the *shifts* section in the site manager
- The Shifts form pop-ups as shown below

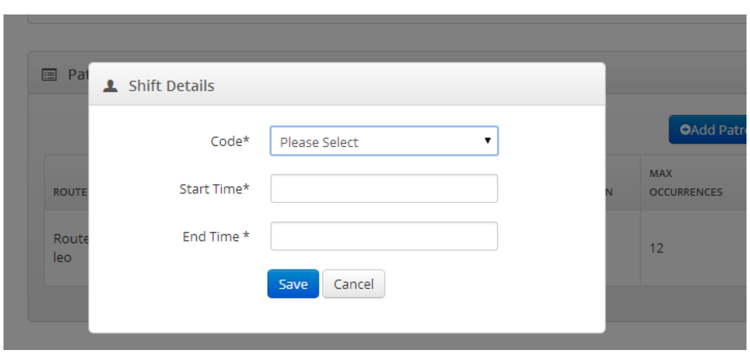



**Fig. 1.8 Shift details Form**

- Select the shift code and enter the start time and end times of the shift
- In the event that no shift codes have been set up, go to Settings/Manage Shift Codes to define

**NB:** To enter the time just click inside the textboxes and in the sliders that appear click on the slider and slide to the hour and minute required.

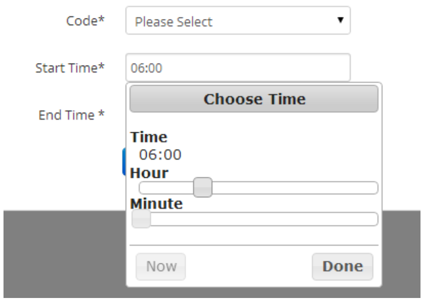



**Fig. 1.9 Time sliders to aid in time entry**

- Click on *done* in the time sliders to enter the times
- Click on *save* on the Shift details form to enter the shift in the Site Manager
- The new shift details will now appear under the *Shifts* section of the Site Manager

## 4.5To add a Patrol Route to a site

- Patrol routes set the activity sequence for guards
- In the site manager view click on the *Add Patrol Route* button in the Patrol Route Sequence section
- The Patrol Route addition form opens as shown below

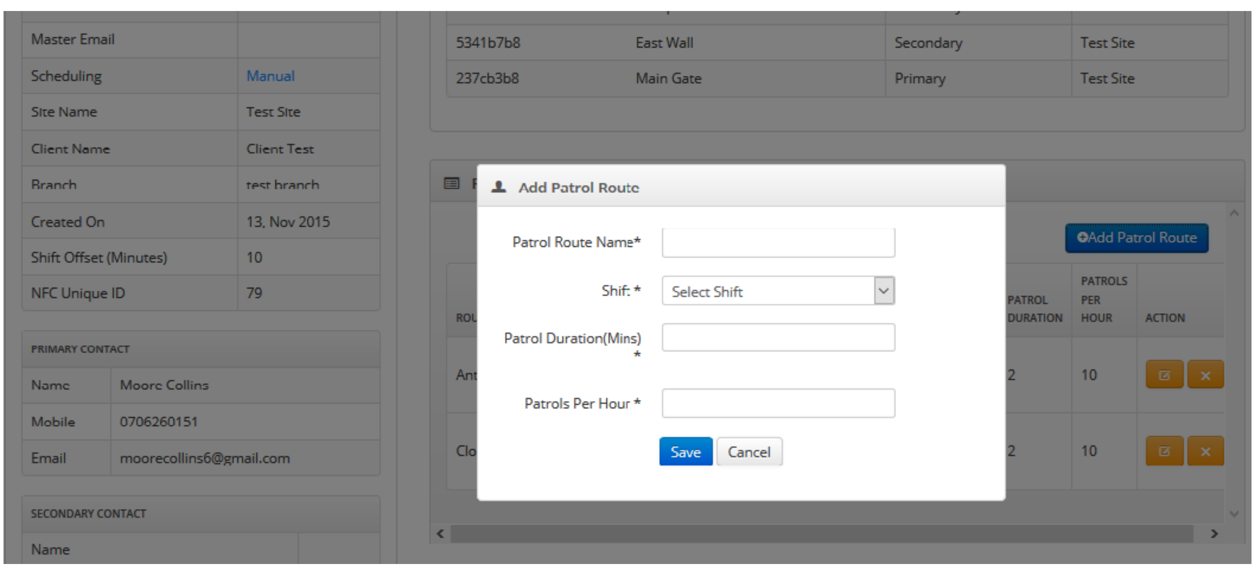



**Fig. 2.2 Patrol Route addition form**

- Name the route to be added and select the shift where the route is applicable

- Set the maximum time it's supposed to take to complete the route (maximum allowable time is 59 minutes)
- Set how many times the route to be done in one shift by entering the figure in the Max Occurrences textbox. For example:
    - For hourly (on average) routes in a 12-hour shift, select 12
    - For routes every 15 minutes (on average) in a 12-hour shift, select 48
- Click on save to save the patrol route
- The new route is added to the list of patrol routes under the *patrol routes* section of the site manager with all the patrol points of the site listed as columns but with blank values in the new patrol route

## 4.6To add patrol sequence to a Patrol Route in Site Manager

- Navigate to the specific patrol route where you wish to enter the patrol sequence
- Identify the order of patrol points in the patrol route you require by starting at 1 and numbering upwards
- Click on the pencil next to the textbox on the patrol point you wish to order to make the textbox editable
- Only apply a sequence number to a patrol point if it is required to visit that patrol point on that route (it is ok to leave patrol points with no sequence)

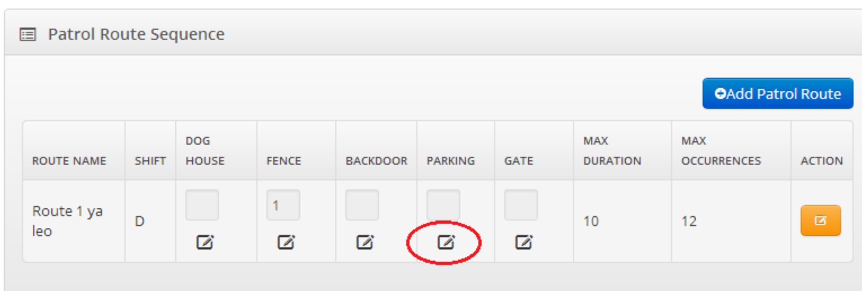
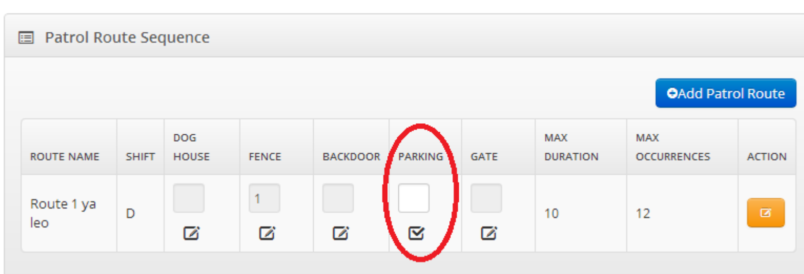



**Fig. 2.3 Patrol sequence**

- The textbox becomes editable and the pencil changes to a tick as shown below




- Enter the sequence digit in the editable textbox
- Click on the tick box to save the sequence, the tick changes to a pencil to signify the edit is successful

- Continue with the other patrol points in your patrol route sequence

## 4.7To allocate staff to a site

- Click on the *Manage staff allocations* button on the bottom left of the site manager
- The monthly site timesheet opens by default showing all the staff allocated to the site in the selected month

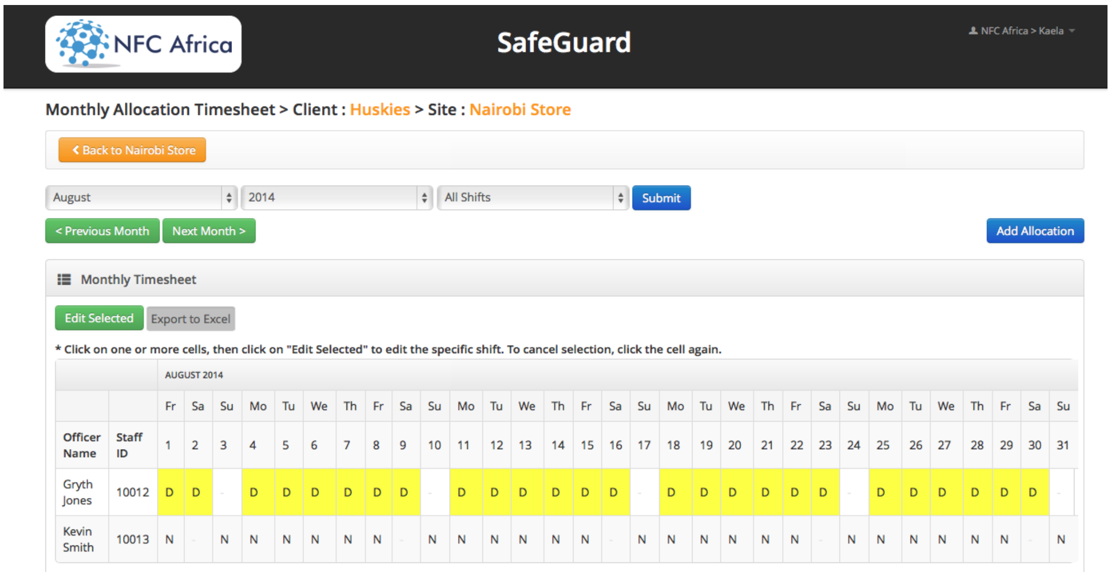



**Fig. 2.0 Monthly site timesheet**

- You can select different parameters in the month and the year, click on the Submit button if you need to see the monthly view of the site in different period (or use previous/next month button)
- Click on Add Allocation to add a new staff allocation to the site, the new allocation form appears as shown below

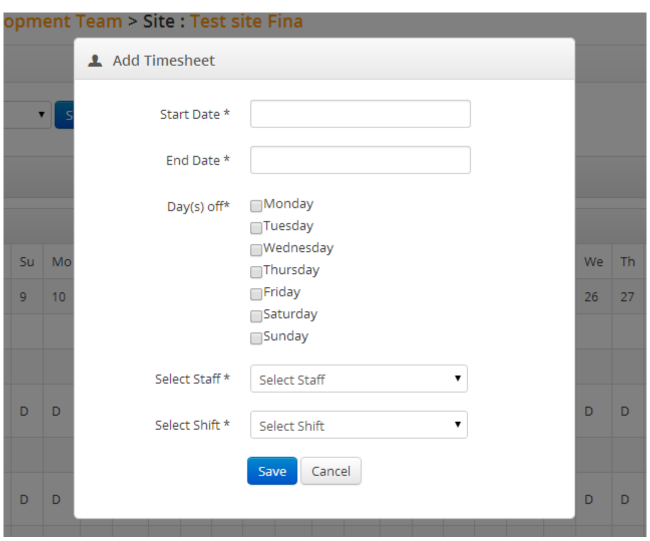



**Fig. 2.1 Staff allocation addition form**

- Enter the *start date* and *end date* of the allocation to enter
- Select the off day(s). If allocating a reliever working on multiple sites, there may be many off days
- Select the staff member to do the allocation for
- Select the Shift applicable for the allocation
- Click on save to insert the allocation
- The new allocation is entered into the monthly timesheet for the period selected in the date range, confirm by reviewing the monthly calendar for the detailed months
- Click on the *Back to [Site Name]* link on the top left of the monthly timesheet view to navigate back to the site manager

## 4.8 Manual Site Scheduling

- If the site is a manual scheduled site, then activity is set up using the manual site scheduler (found below the Monthly Allocation Timesheet)

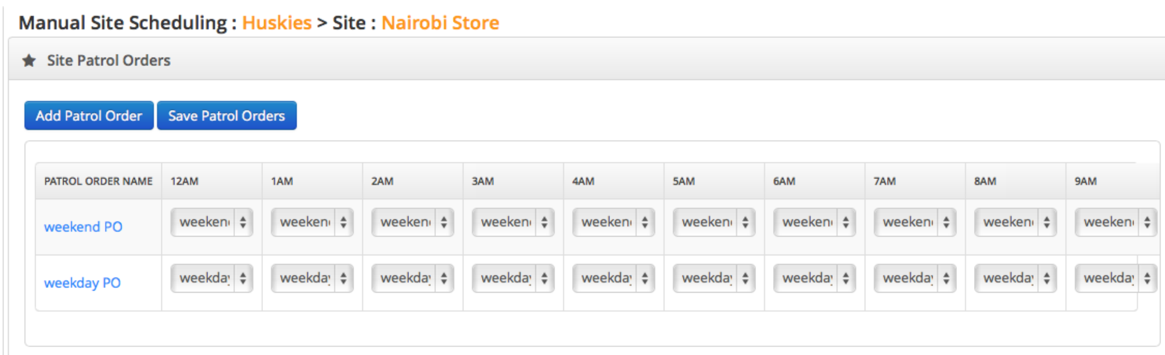



**Fig. 2.2 Manual Site Scheduling – site patrol orders**

- A patrol order governs activity in one hour buckets over a 24-hour period

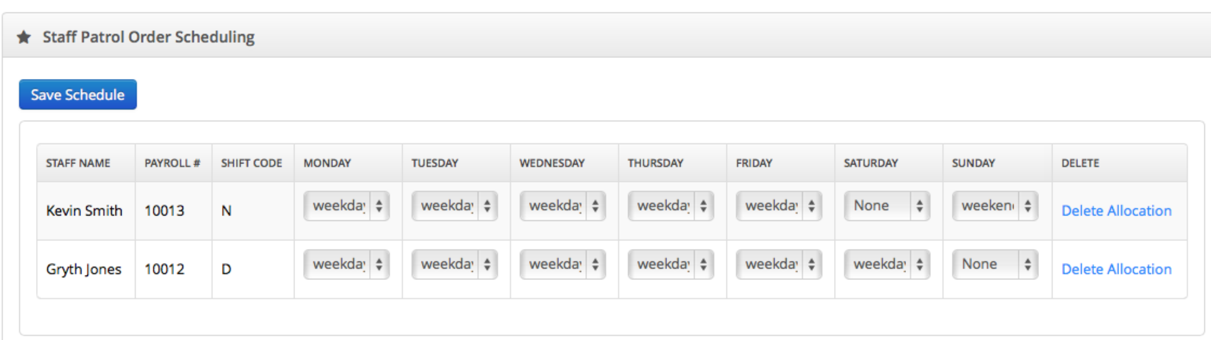



**Fig. 2.3 Manual Site Scheduling – staff patrol order scheduling**

- This is where you allocate specific guards to specific patrol orders. By using combinations of patrol routes, patrol orders and guard allocations, you can achieve maximum flexibility of guard deployment

## 5.0 Master Setup

The Master Setup menu drop down allows you to access, view and edit the following;

- Manage Users
- Manage Shift Codes
- Manage Staff types
- Manage User Rights
- Notification Settings
- Manage Control Room Resolution
- Manage Report Settings

## 6.0 Client Manager Menu

The client menu drops down allows you to access, view and edit client and site information in an efficient way. The menu includes:

- Client Setup
- Client Manager
- Clients
- Contracts
- Sites
- Manage Report Settings

## 7.0 HR Manager

Under the HR Manager drop down there are four options:

- Staff; Enables you to access view and edit the staff types in the system
- Manage timesheets: you can view and edit timesheet allocation periods for individual guards. You can sort by client and site
- Terminate Staff
- Monthly timesheet: this view allows you to see a full roster of all staff by month and is fully filterable and sortable

## 8.0 Site Manager

Under the patrols drop down there is the following option:

- Site Manager; Enables you to view and edit the sites.
- Shifts Enables you to access, view and edit the shifts
- Patrol Points; Enables you to access, view and edit the patrol points

# 9.0 Reports

## 9.1 Attendance Report

This report gives details of the guards who have reported to work. If present it is represented by 1 and absent is denoted by 0

## 9.2 On-Shift On-Time Exceptions

This report details guards who fail to report on time at the beginning of their shift. Guards that do report on time are not captured in this report. The report is sortable by any field by simply clicking in the header of the relevant field.

## 9.3 Patrol Performance Exceptions

This report details all the patrols missed or failed. The report is sortable by any field by simply clicking in the header of the relevant field.

## 9.4 Control Room Report

This report gives details of the following;

- Performance of the last 12 hours
- No of exceptions in the last 12 hours
- Unresolved exceptions in the last 12 hours
- Resolved exceptions in the last 12 hours

You can also filter the reports to select the desired client or site.

## 9.5 Control Room Analysis

This report gives you the diagrammatic representation of the performance of the guards in terms of charts

## 9.6 Live Patrol Performance Exceptions

This report is designed to be used in control centers or operations offices. The report opens in a new window or tab, and self-refreshes every 30 seconds until the window is closed. This report is critical in identifying potential problems or incidents and can assist in rapid response deployment. The report self-sorts and shows the most recent failures at the top of the list.

## 9.7 Patrol Percentage Exception Report

This report enables analysis of individual guard performance over specified time periods. The report measures patrol failures as a ratio against patrol successes. Organizations may wish to set performance thresholds for guards as part of a performance management system. This data will be useful in periodic reviews of guard performance.

## 9.8 Security Officer On-Shift Report

This report indicates the time that all guards (as opposed to only those guards who are late in the Exception Report – see 9.2) log on and report to site at the beginning of their shift.

### 9.9 Security Officer Daily Patrol Performance Report

This report indicates the performance of all guards by shift. It is sortable and filterable to allow detailed analysis.

### 9.10 7 Day Tag Performance Report

This report provides a rolling 7-day view of the percentage of successful patrol point tag events versus failed patrol point tag events.

### 9.11 30 Day Tag Performance Report

This report provides a rolling 30-day view of the percentage of successful patrol point tag events versus failed patrol point tag events

### 9.12 Timesheet vs Attendance Report

This report gives you the performance of a guard for 30 days, compares the failed vs successful patrols and gives the percentage performance of the guard.

### 9.13Live Patrol Route Report

This report uses a useful Red, Green graphical display to indicate patrol performance over the preceding 24-hour period. This report is particularly useful when communicating with clients.

### 9.14 Live Tag Compliance Report

This report uses a useful Red, Green graphical display to indicate patrol point tag performance over the preceding 24-hour period. This report is particularly useful when communicating with clients at a detailed level.

### 9.15 Patrol Route Compliance Report

This report provides a slightly different view to other patrol route reports. Shows failed no of patrols, pending and completed number of patrols and finally the percentage success, on a daily basis.

## 10.0 Message

This option gives you the performance information of each and every security officer, in percentage, it also gives notifications if you have won an incentive (Clients who have a working incentive plan)

## 11.0 Incentives

Under this option one can be able to manage incentives, view winners report and the credit reports

## 12.0 Settings

### 12.1 Manage Users

This allows you to set up and administer web portal users on your sub domain.

## 12.2 Manage Branches

This allows you to add, edit or delete branches under your sub domain.

## 12.3 Manage Shift Codes

This allows you to add, edit or delete shift codes.

## 12.4 Manage Staff Types

This allows you to set, edit or delete different staff types and names.

## 12.5 Manage Report Settings

This allows you to add, edit or delete automated email report settings.