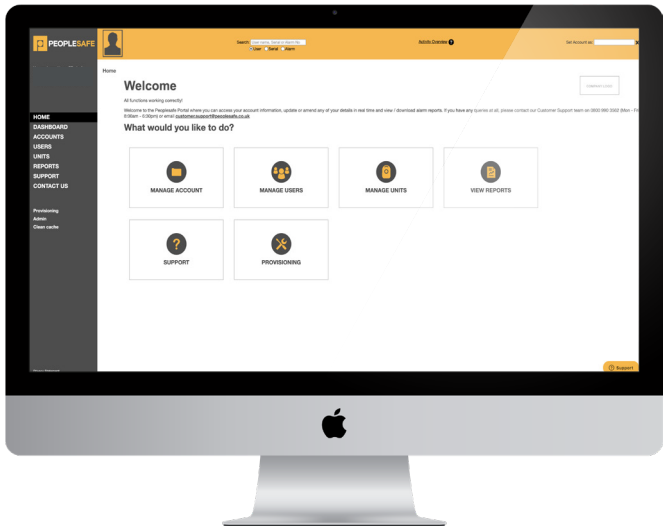
PEOPLESAFE

PEOPLESAFE PORTAL TIPS AND TRICKS STARTER GUIDE

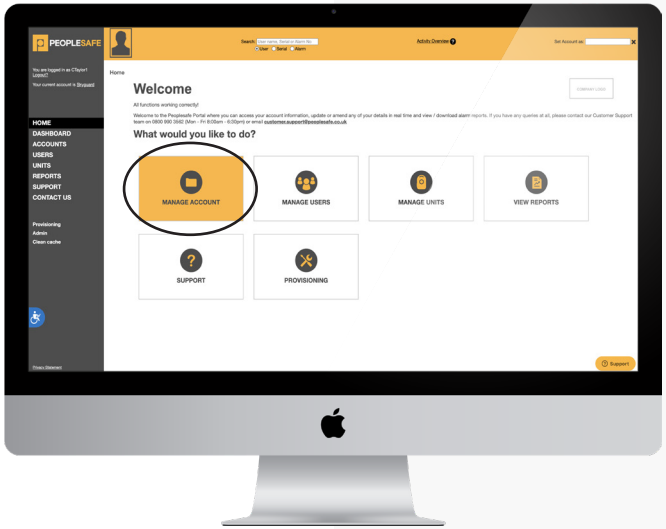


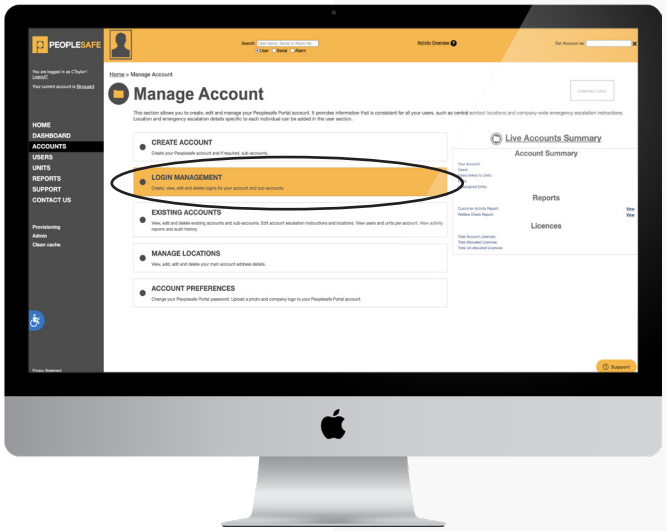
GETTING STARTED

Check your permission level

Click ‘Manage Account’ on the homepage and then ‘Login Management’. Your current permission level will be displayed under the Role column.

A) Group	Full profile access.
B) Group Admin	As (a) can view event, but mapping report is restricted.
C) Account	Access limited to one account.
D) Account Admin	As (c) can view event, but mapping report is restricted.
E) User	Own profile access - as (a) but just for thier own profile, can link and delink devices.
F) User RR	As (e) but no access to reporting infomation. External User/Controller/Consumer should not be used.





ACCOUNTS

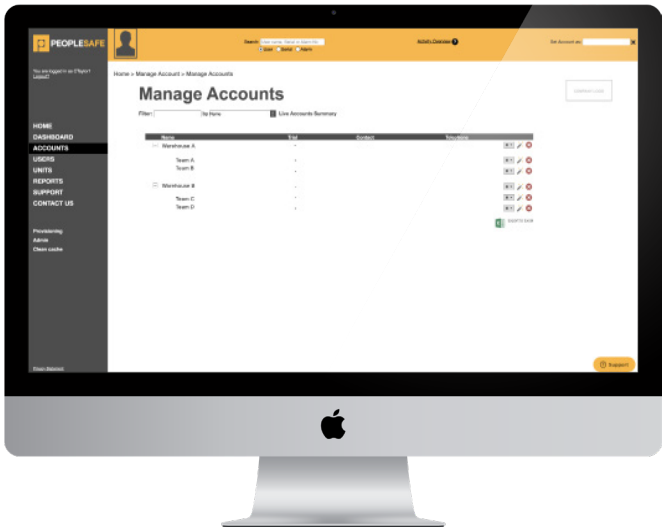
Creating accounts

your parent account will be your company name, but you can create accounts under this:

Set up different accounts for each of your branches, locations or departments. The account name you create is used when you need to view the account (e.g. ‘Manchester – City Centre’ or ‘Warehouse A’).

Using sub accounts

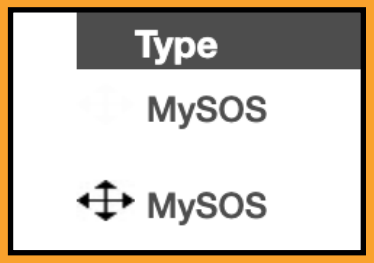
Further categorise your users with sub accounts. Within each location or department, there might be separate teams – this is where you can utilise sub accounts (e.g. ‘Team A’ and ‘Team B’ under the ‘Warehouse A’ account).



Organising your devices

Once you have settled on an account structure, you can drag and drop your units into these accounts.

In the parent account, navigate to ‘Units’ and then ‘Existing Units’. Hover over the device you want to move until the ‘crosshair’ symbol shows up on the left of the device Type. Click and hold this symbol and then drag it on to the name of the account you want to move the device in to.



USERS & UNITS

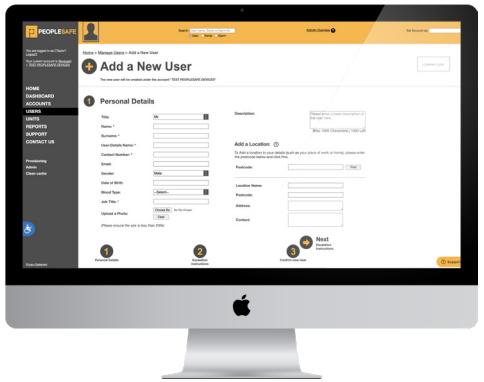
Creating users

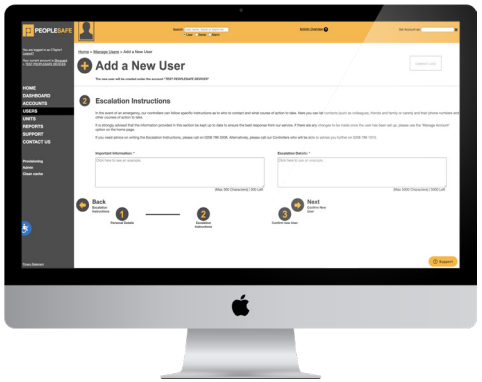
Populating user information is essential for ARC Controllers to effectively manage alarms

Use the Description box to include information such as physical appearance and any distinguishing features.

Medical conditions, allergies and duress codes can be entered into the Important

Enter at least three escalation contacts into the Escalation Details box – they should be people in the organisation, not next of kin.





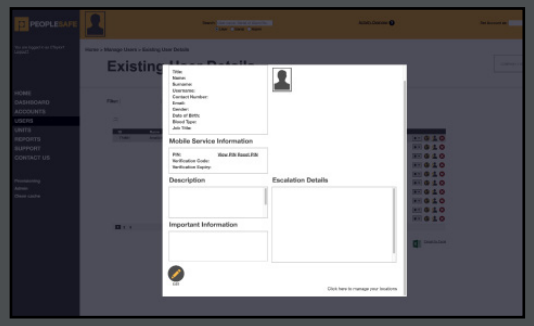
Pooled / Shared devices

Create generic users (e.g. 'Night Shift Workers' or 'District Nurses') instead of entering specific names. NOTE: First name and surname fields both have to be filled in.

Use the Important Information box to list the users of the shared device along with their contact phone number, so that in the event of an alarm being raised they are contactable.

Upload a photo

Users can be more easily identified in an emergency if Controllers have access to a recent photo. From the homepage, select 'Manage Users', then 'Existing User Details'. Find the user you wish to edit, click 'edit' and then follow the on-screen instructions to upload your image.



Linking a unit

Once all of your user profiles have been created, you will need to link a unit to them.

Go to ‘Users’ then ‘Existing User Details’. Find the user you want to link the device to and click the icon with a person holding a mobile phone on the right-hand side. Find the correct device in the list of units available to link and then select ‘Link’.

Naming units

For easier unit management, you can name them instead of using the serial number on the back of the device. **NOTE: Naming the device for a specific person does not link it to that user.**

Creating logins to give others access to the portal

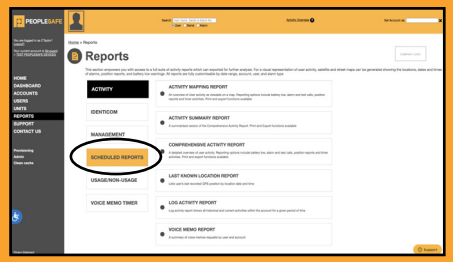
NOTE: Make sure you’re in the account you want to give the user access to. Go to the Accounts tab, then ‘Login Management’ selecting ‘Add New Login’. Fill out the relevant information and select the appropriate Role for the user.

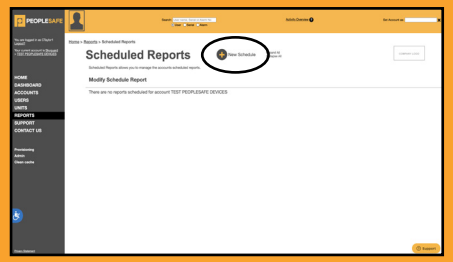
REPORTS

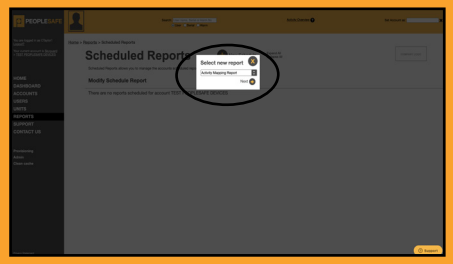
Schedule reports

We recommend running monthly reports to ensure the service is being used effectively.

Navigate to the ‘Reports’ section, click ‘Scheduled Reports’ in the menu, then click ‘New Schedule’ and select the desired report.



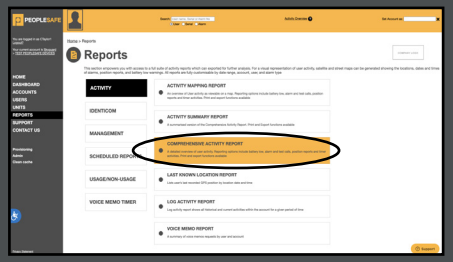


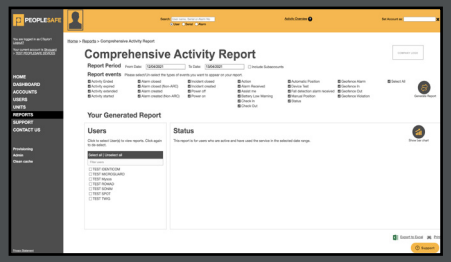


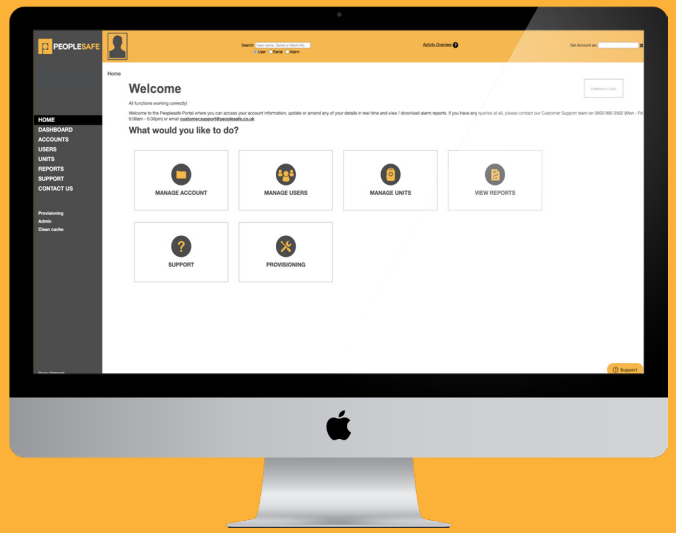
Comprehensive Activity Report

this is the most popular report on the Portal, giving you an overview of all the activity that has come from the devices.

Go to the Reports section and select ‘Comprehensive Activity Report’ from the list. You can select a date range you want to view, the type of activity from the device and the users you want to view the activity for.







For additional support about the devices or the Peoplesafe Portal, navigate to the 'Support' option in the left-hand side menu. From here you will have the option to view User Guides, Training Videos or look through the FAQ section.

You can even type a keyword into the FAQ section to find specific results quickly. For instance, typing in Scheduled Reports will surface information related to this.

Alternatively, you can raise a support ticket by simply sending an email to **customer.support@peoplesafe.co.uk** and one of our team will respond to you within 24 hours, Monday to Friday.

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