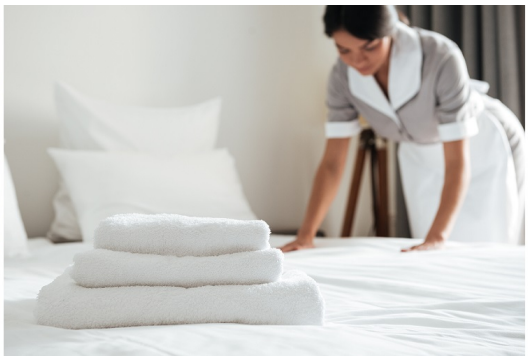
HELP ALERT®
Wireless Panic Alert System


HELP ALERT® Real Time Locating System

Software Administration Guide

Contents

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Warnings / Cautions / Compliance

It is important for your facility to implement and enforce the following WARNINGS and CAUTIONS in order to keep all equipment functioning properly. Disregarding the information and instructions in this document is considered abnormal use and may result in injury or system failure.

Warnings

ACCESSORIES (SUPPLIES)—To ensure staff safety and proper operation of equipment, use only parts and accessories manufactured or recommended by RF Technologies, Inc. Parts and accessories not manufactured or recommended by RF Technologies, Inc. may not meet the requirements of the applicable safety and performance standards.

Failure to use the components and supplies specified by RF Technologies, Inc. may result in equipment and/or system failure.

INSTALLATION AND CONFIGURATION—It is the responsibility of the facility to follow the installation instructions carefully, as outlined in the applicable system guides, and to use the components and supplies specified by RF Technologies, Inc. for all installations.

Failure to use the components and supplies specified by RF Technologies, Inc. may result in equipment and/or system failure.

INSTRUCTIONS FOR SET UP AND USE—It is the responsibility of the facility to follow the instructions for set up and use carefully, as outlined in this manual, and to use the components and supplies specified by RF Technologies, Inc. for set up and use. Do not attempt to use extension cords or other equipment not supplied by RF Technologies, Inc.

Failure to use the components and supplies specified by RF Technologies, Inc. may result in equipment and/or system failure.

SYSTEM INSPECTION—It is the responsibility of the facility to establish and facilitate a regular inspection schedule for your system. RF Technologies, Inc. recommends quarterly inspections of your system for safety and performance by a qualified RF Technologies, Inc. representative.

To arrange for a quarterly inspection by RF Technologies, Inc., call our Technical Support Department at (800)-669-9946 or (262) 790-1771.

Failure to provide regular inspection of these products may result in equipment and/or system failure.

SYSTEM MAINTENANCE AND TESTING—It is the responsibility of the facility to establish and facilitate a regular maintenance schedule for your system, as outlined in the applicable system guides. This includes regular inspection, testing, and cleaning. RF Technologies, Inc. recommends monthly maintenance and testing of your system. It is also recommended that your facility keep records of maintenance and test completions.

Failure to provide regular maintenance and testing of these products may result in equipment and/or system failure.

PENDANT CARRYING —RF Technologies, Inc. provides specific methods for pendant- carrying, which adhere to safety measures to prevent strangulation. Staff members who wear pendants must use the specific “breakaway” lanyards or pendant-clips provided by RF Technologies, Inc.

STAFF SAFETY —The most reliable method of staff safety in any facility entails good “security and safety” policies working in conjunction with the correct operation of the equipment. It is the responsibility of the facility to ensure that other proper safety measures beyond the RTLS system are in place to help keep staff safe, and to understand that the RTLS system alone does not ensure patient safety.

SYSTEM WIRING—All permanent supply connections must be done in accordance with National Electric Code, NFPA 70.

USER TRAINING—Only users who have received adequate training on the use of the system, as outlined in this manual, should use the system. It is the responsibility of the facility to ensure all users have been trained.

Failure to adequately train employees may cause system failure due to user error. In addition, incorrect use of the equipment may also result in system failure.

MR UNSAFE

All RF Technologies Locator Beacons, Pendants, and Equipment Locators “PRODUCT” have been determined to be MR Unsafe as defined by ASTM F 2503-05. Use of “PRODUCT” in a Magnetic Resonance Imaging system will cause injury to residents and staff, MR system malfunction or “PRODUCT” malfunction. Do not bring “PRODUCT” into the MR system area and follow your facilities policies to classify and label “PRODUCT” as MR Unsafe.

Cautions

WORN OR DAMAGED PARTS—If the system parts or components are worn or damaged, you must have the product serviced.

DISPOSAL—At the end of their service life the products described in this manual, as well as accessories (i.e. lithium batteries, banding material, etc.), must be disposed of in compliance with all applicable federal, state and local guidelines regulating the disposal of products containing potential environmental contaminants. Dispose of the packaging material by observing the applicable waste control regulations.

PRODUCT WARRANTIES—Failure to follow the Warnings and Cautions in this guide voids any and all Product Warranties.

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Preface

Introduction

This guide provides detailed information about the Series 3.x **HELP ALERT® Real Time Location System (RTLS)** Software (powered by Pinpoint). This guide will detail the following:

- Configuration of network and system user information
- Configuration of the customer site
- Configuration of the people and devices to be monitored by the system
- Reporting on current and historical system data

System Overview

RTLS is a real time location system designed for Equipment Tracking and Staff Duress. The software provides a mechanism for configuring one or more buildings to determine locations of Pendants, Equipment Locators, and Locator Beacons.

The RTLS software platform contains two products:

- HELP ALERT (for Staff Duress)
- EXACTRACK (for Equipment Tracking services)

The RTLS software can be identified as HELP ALERT, EXACTRACK, or RTLS if both Help Alert and ExacTrack are in use.

Help Alert

HELP ALERT software allows staff members to discreetly send a distress call when assistance is needed. The software can provide detailed information about the staff member in duress including their current location.

ExacTrack

EXACTRACK software can monitor the location and utilization patterns of equipment, from an easy to use search interface. When an Equipment's Tracker has been tampered with, the software will also share the alert notification.

Intended Audience

This guide is intended for users who configure and administer the software. It includes detailed information about the software, and how to configure, administer, and maintain the software.

Contact Information

For more information about RF Technologies, Inc. products, go to www.rft.com.

Technical Support

For technical support, contact the Technical Support Team at:

(800) 669-9946, option 5 or (262) 790-1771

tech@rft.com

Customer Care

For questions on part replacement or for ordering new parts, contact the Customer Care Team at:

(800) 669-9946, option 2

customercare@rft.com

Sales

For questions regarding system add-ons, contact your Sales Manager.

Chapter 1 – Getting Started

Introduction

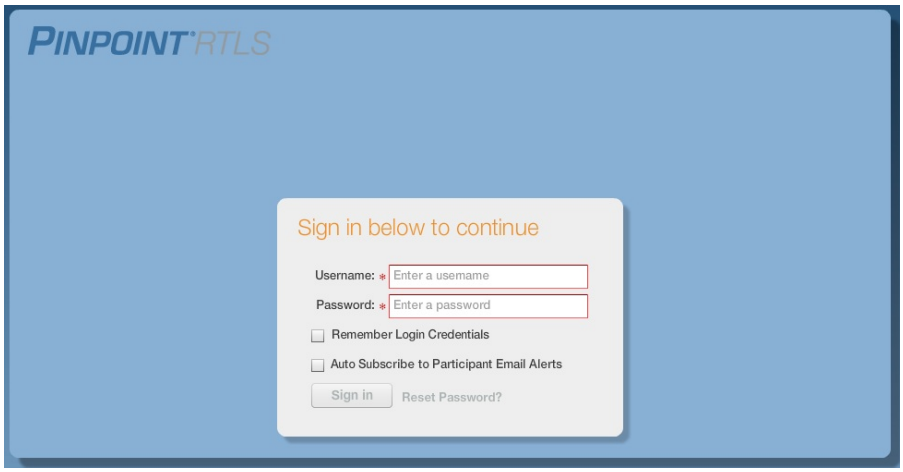
Some features of the RTLS system can be activated or disabled in the system's configuration files, or restricted based on the software user's account role. Because of this capability, some features listed in this document may not be visible in your instance of the software.

Instructions for modifying these configurable features can be found in the *Help Alert RTLS Software Installation Manual*.

Getting Started

RTLS is a client-server application where the main software is installed on the server and the client accesses and runs this software using an approved Internet Web Browser (preferred browser is Google Chrome, but Mozilla Firefox and Internet Explorer 10 or newer can be used).

A site specific URL will be determined at the time of installation, typically similar to http://<computername>/PinPoint/



Login

All access to the system requires a valid Username and Password for each Administrator. To get started, each Administrator will use the system's default administrator credentials. This account can then be modified later and other accounts with unique roles can be created.

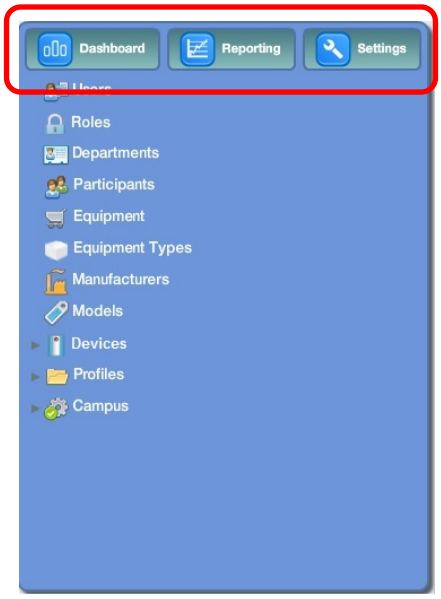
To log into the system:

1. Enter the default Login and Password
   - **Username**: *admin*
   - **Password**: *pinpoint*
2. Press **Enter** or click **Sign In**
3. The Admin user interface window is displayed.

NOTE: All users logging in for the first time are required to read and accept The **End User License Agreement (EULA)**

Navigation

There is a footer based toolbar that has location engine links, as well as links to Switch to User Mode, Logout, About information, and Help.

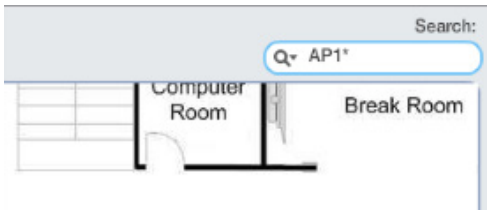


You can quickly switch between the dashboard, reports, and system settings by using the buttons for Dashboard, Reporting, and Settings.

On the left-hand side is the Navigation pane. The links here are used for building the campus configuration, adding users, adding equipment, adding participants, etc…

Search

As the amount of data within the system grows, it may be helpful to use the Search bar in the top right corner of any screen to quickly find a specific item.



Dashboards

Consisting of charts, graphs, and simplified lists, Dashboards provide a convenient and efficient summary of commonly useful system metrics. Dashboards are designed to be the fastest means of presenting the most useful information for a wide range of system statistics.

There are several different dashboards available in the RTLS software. Each one focuses on a different aspect of the system.

To access dashboards:

1. Click the **Dashboards** button on the Navigation pane
2. Click the desired tab

Some Dashboard charts can be flipped over to reveal more information. If the cursor turns into a hand when moving the mouse over a chart, click the chart to see the additional information.

Before ***After***

In any grid view in the Admin, Participant Alerts, or Equipment Alerts Dashboards, extended information about a device can be viewed by clicking the device's MAC Address hyperlink.

Admin

The Admin Dashboard is based around overall equipment locator, pendant, and locator beacon population and current status. It gives a general report of the number of each device, the current battery status, and information about daily check-ins.

Server Health

The Server Health Dashboard includes multiple charts displaying various metrics relevant to monitoring and diagnosing the performance of the server on which the RTLS application has been installed.

The Server Health dashboard view displays the server, CPU, RAM, and disk usage for the last 7, 10, 14, 30, 60, 90, 180, or 365 days (default is Last 7 Days).

Participant Alerts

The Participant Alerts dashboard view displays the number of alerts, when and where they occurred, response time, and a weekly breakdown. The alerts can be displayed for the last 7, 10, 14, 30, 60, 90, 180, or 365 days (default is Last 30 Days).

NOTE: Alert Dashboards also include drop-down menus that allow administrators the choice of including or excluding Priority Alerts and Test Alerts in the data presented, displaying only Priority Alerts, or displaying only Test Alerts in the data.

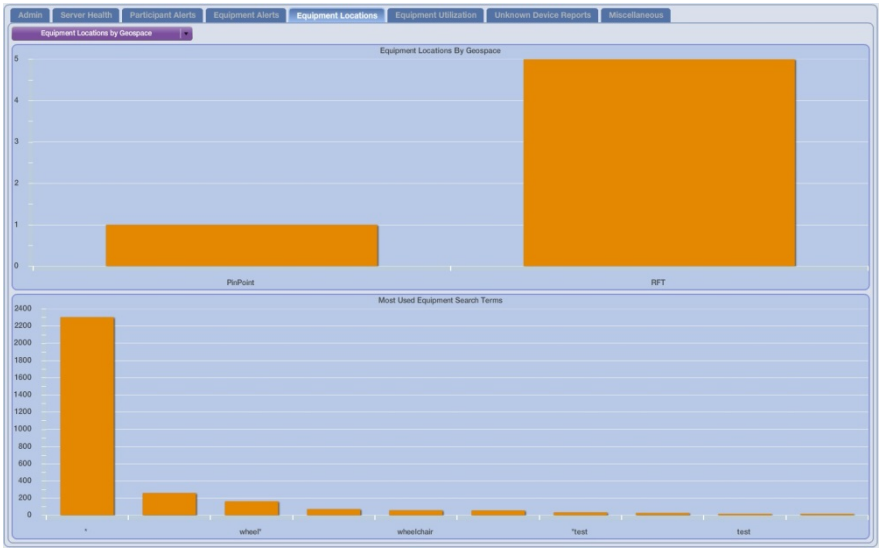
Enable Priority Alerts are a configurable option that may not be available at every facility

Equipment Alerts

The Equipment Alerts dashboard view displays the number of alerts, when and where they occurred, response time, and a weekly breakdown. The alerts can be displayed for the last 7, 10, 14, 30, 60, 90, 180, or 365 days (default is Last 30 Days).

Equipment Locations

The Equipment Locations dashboard view displays equipment locations by Geospace and what the most searched equipment terms are.



Equipment Utilization

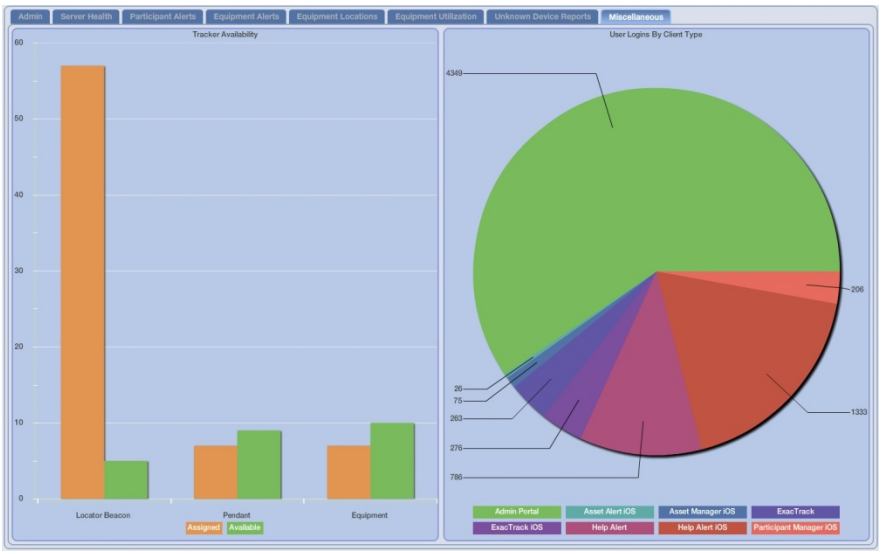
The Equipment Utilization dashboard view displays the current and historical utilization of all equipment within the system by type and department. The results can be displayed for the last 7, 10, 14, 30, 60, 90, 180, or 365 days (default is Last 30 Days).

Unknown Device Reports

The Unknown Device Reports dashboard is an optional view that displays the number of reported unknown access points (access point the system can hear but has not been uploaded into the Help Alert RTLS system) for the last 7, 10, 14, 30, 60, 90, 180, or 365 days (default is Last 30 Days).

Miscellaneous

The Miscellaneous dashboard view displays the number of assigned and available devices within the system, along with the user logins by client type.



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Chapter 2 – Monitored Elements Configuration

Introduction

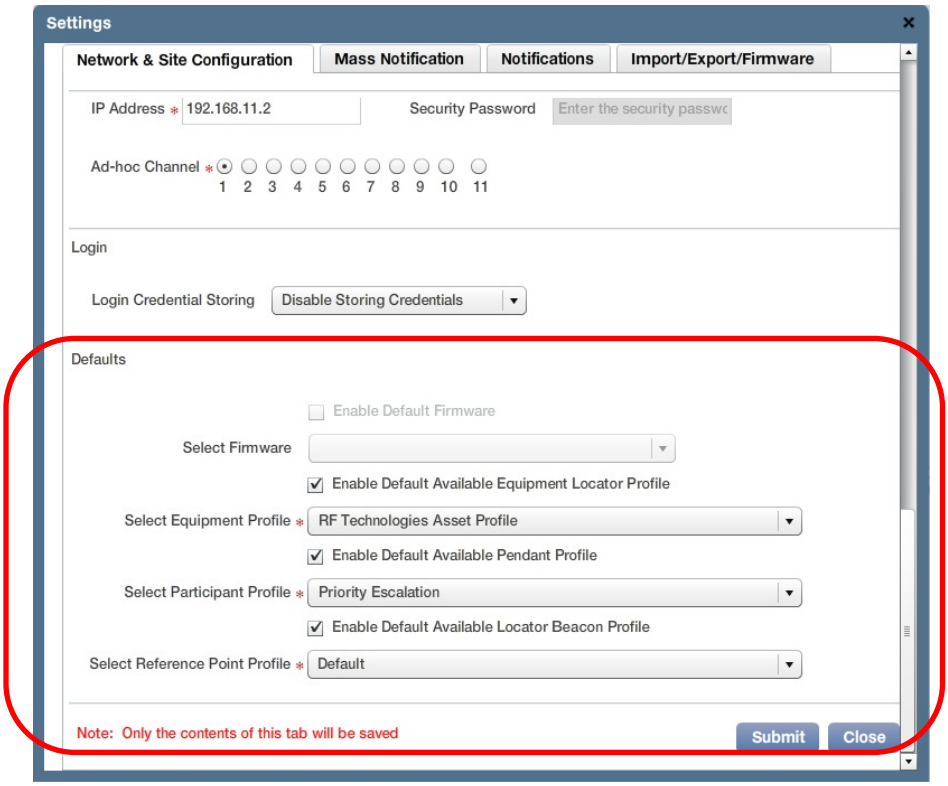
The monitored elements of the RTLS System include the Pendants and Equipment Locators to be located by the system, as well as the Locator Beacons that the system uses to interface with Pendants and Equipment Locators.

Administrative users may add or edit the configuration of these elements at any time after the Network Configuration has been set up. Practical information related to Tag functionality is configured through Firmware and Profile settings, while descriptive information is configured under Participants and Departments for Participants, and under Equipment, Equipment Types, Manufacturers, and Models for Equipment.

Default Firmware

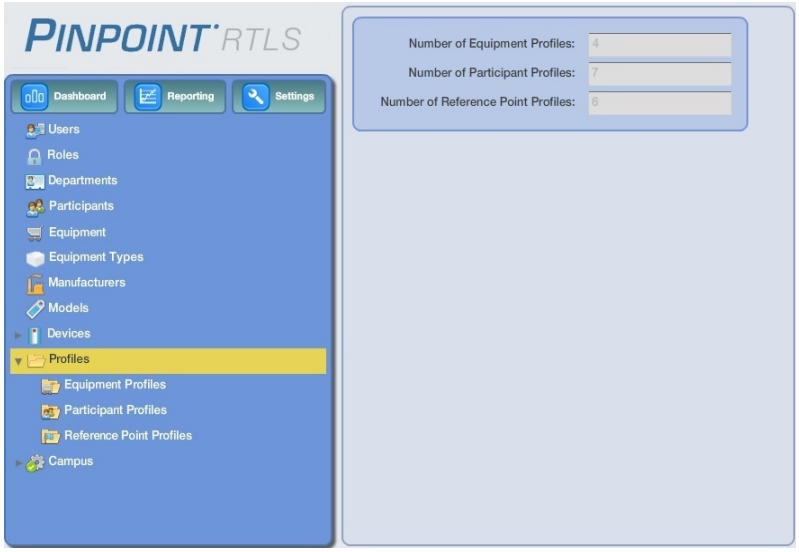
The default Firmware Profile for each type of device can be selected via the Network & Site Configuration tab of the Settings menu.

NOTE: The ability for the RTLS system to wirelessly update the version of Firmware on any of the devices checking in to the system will be available in a future release.



Profiles

Profiles are used to define and categorize the behavior of devices associated to different types of equipment, participants, and reference points. For example, an equipment locator associated to a highly mobile wheelchair may be configured differently than an immobile x-ray machine. Profiles are used to manage these configuration differences.



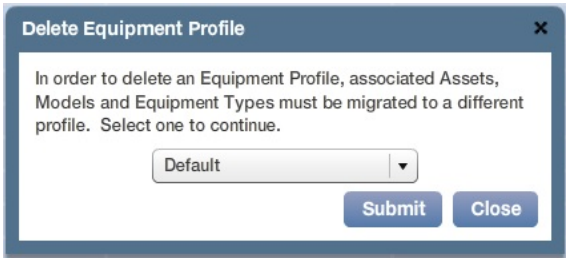
To edit a profile:

1. Expand the tree structure for **Profiles** on the Navigation pane
1. Click the Equipment, Participant, or Reference Point Profiles link
2. Find the profile to be changed in the list and click to select it
3. Click the **Edit Profile** button
4. Make the desired changes
5. Click **Submit**

To remove a profile:

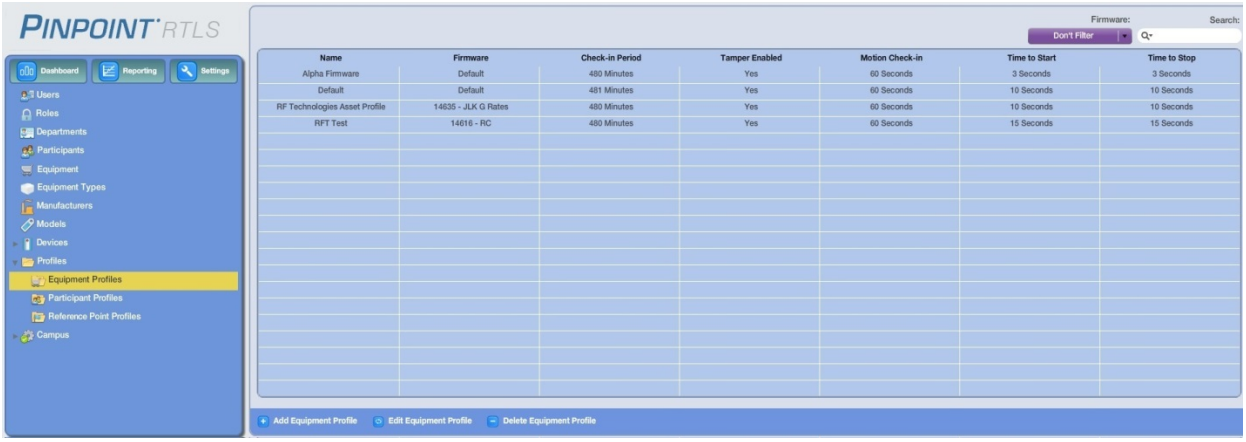
1. Expand the tree structure for **Profiles** on the Navigation pane
2. Click the Equipment, Participant, or Reference Point Profiles link
3. Find the profile to be removed in the list and click to select it
4. Click the **Delete Profile** button
5. Click **Yes** in the confirmation popup

NOTE: In order to delete a Profile of any type, any equipment using that Profile must have a different profile assigned before the profile can be deleted. The Delete Profile Dialog shows the list of alternative Profiles. If there are no available Profiles of the same type, the Profile cannot be deleted.



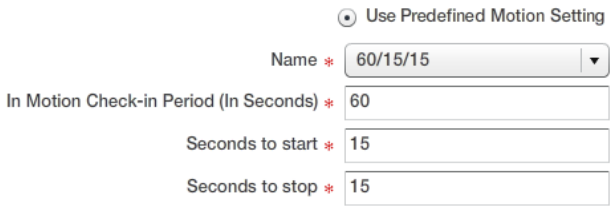
Equipment Profile

Equipment Profiles control settings such as Tamper Alarms, motion detection settings, and communication with the server of Equipment.

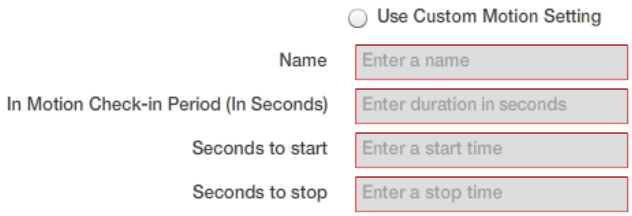


To add an equipment profile:

1. Expand the tree structure for **Profiles** on the Navigation pane
1. Click **Equipment Profiles**
2. Click the **Add Equipment Profile** button
3. Enter a unique **Name**
4. Enter a **Check-in-Period** (the interval the device will use to check into the server) in minutes
5. If you would like to override the current default version of the firmware, click the **Custom Firmware** checkbox then select the appropriate version in the **Select Firmware** field
6. If applicable, check the **Enable Tamper Alarms** checkbox
7. Check either the **Use Predefined Motion Setting** or **Use Custom Motion Setting** radio button
   - When **Use Predefined Motion Setting** is selected, you can select the Equipment Tracker's Motion behavior from a drop-down list



   - When **Use Custom Motion Setting** is selected, you can create a new named motion setting for use by this and other profiles.



8. The **In Motion Check-In Period** is the number of seconds between location updates while in motion (must be in 60 second intervals)
9. The **Seconds to start** is the number of seconds that motion must be detected before reporting begins and the **Seconds to stop** is the number of seconds of no motion detection before reporting stops
10. Click **Submit**

Participant Profile

Participant Profiles control how long the button needs to be pressed before an alarm is triggered and how often the pendant communicates with the server.

To add a participant profile:

1. Expand the tree structure for **Profiles** on the Navigation pane
2. Click **Equipment Profiles**
3. Click the **Add Participant Profile** button
4. Enter a unique **Name**
5. Enter a **Check-in-Period** (the interval the device will use to check into the server) in minutes
6. Enter an **Out of Office Period** (the number of days of failed check-ins prior to reporting an exception) in days
7. If you would like to override the current default version of the firmware, click the **Custom Firmware** checkbox then select the appropriate version in the **Select Firmware** field
8. Use the **Alert Button Press Time** slider to select how long the button on a Pendant must be held for before an Alert is triggered. If High Priority Alerts are Enabled for this Profile, a normal Alert will be triggered instantly on a button press, and the “Alert Button Press Time” property will govern the amount of time the button must be held to trigger a Priority Alert.
9. If applicable, check the **Enable High Priority Alerts** to allow Participants the ability to designate an alert as Priority so that it can be treated differently from Normal Alerts throughout the system (**NOTE**: High priority alerts are a configurable feature that may not be available at every facility. Refer to the training manual for additional configuration details.)

The treatment of High Priority Alerts will be determined by every customer differently, based on each company's security policy. In the RTLS system, High Priority Alerts will be distinguished visually. Likewise, system communication with external devices can be configured to behave differently for High Priority Alerts, such as sounding an audible alarm or directly dialing 911 and playing a pre-recorded message.

10. Click **Submit**

Reference Point Profile

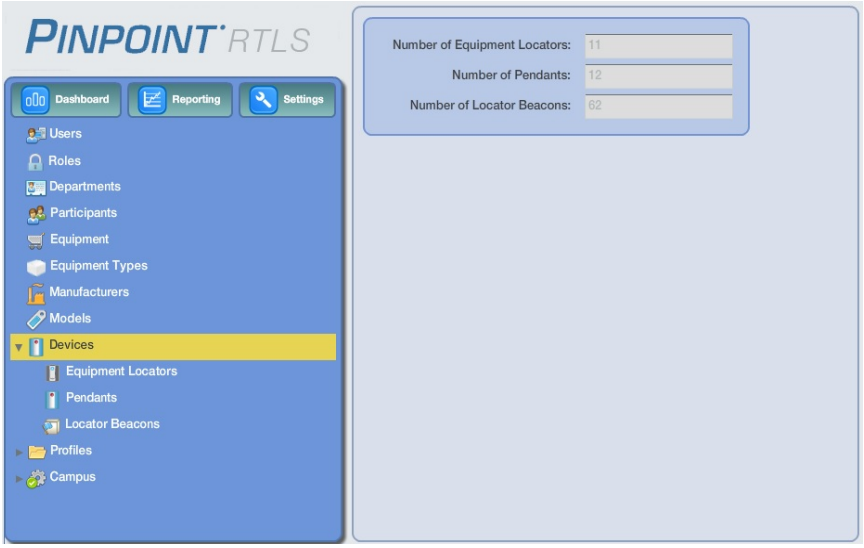
Reference Point Profiles control how often the Locator Beacons communicate with the server.

To add a reference point profile:

1. Expand the tree structure for **Profiles** on the Navigation pane
2. Click **Reference Point Profiles**
3. Click the **Add Reference Point Profile** button
4. Enter a unique **Name**
5. Enter a **Check-in-Period** (the interval the device will use to check into the server) in minutes
6. If you would like to override the current default version of the firmware, click the **Custom Firmware** checkbox then select the appropriate version in the **Select Firmware** field
7. Click **Submit**

Devices

There are three main types of trackers in the RTLS system: Equipment Locator, Pendant, and Locator Beacons. Pendants can be further defined as either a Pendant or a fob with the Mass Notify feature.



Equipment Locators

Equipment Locators are devices that can be, or already are, associated to a piece of equipment.

"Available" Equipment Locators are ready for association but are not currently assigned to a piece of equipment, whereas "Assigned" Equipment Locators are already associated to a piece of equipment and are in use by the RTLS system..

View Extended Information

Each Equipment Locator has Extended Information that can be viewed by selecting it from the list of devices and clicking the **View Extended Information** button at the bottom of the screen. This Information can vary by device type and whether or not the locator is assigned to something. The contents of extended information is controlled by permissions, so some Administrator accounts may not have access to these features.

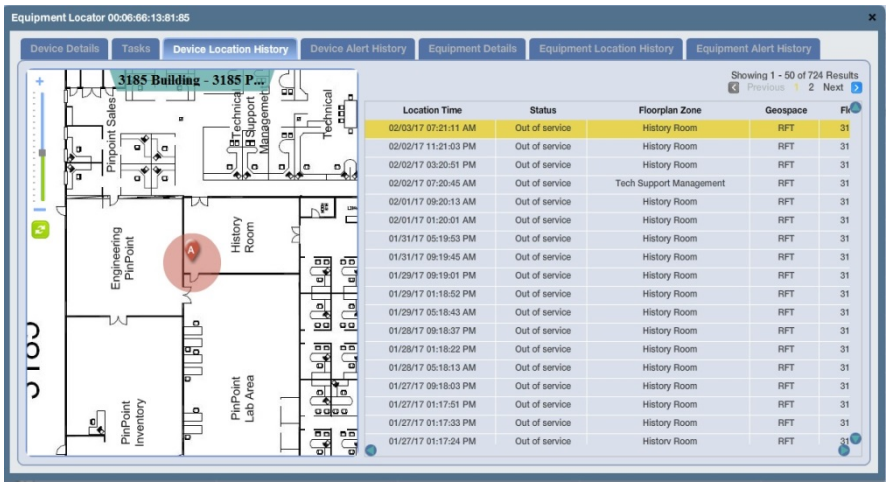
For equipment locators this includes:

- Device Details
- Tasks

- Device Location History
- Device Alert History

If currently assigned to equipment, the following will also display:

- Equipment Details
- Equipment Location History
- Equipment Alert History



Pendants

Pendants are devices that can be, or already are being used by the system's Participants and are the means through which Participants send alerts to the security staff during staff duress situations.

The Tag Type column distinguishes between a Pendant and the new Mass Notify pendant.

"Available" Pendants are ready to be assigned to Participants.

View Extended Information

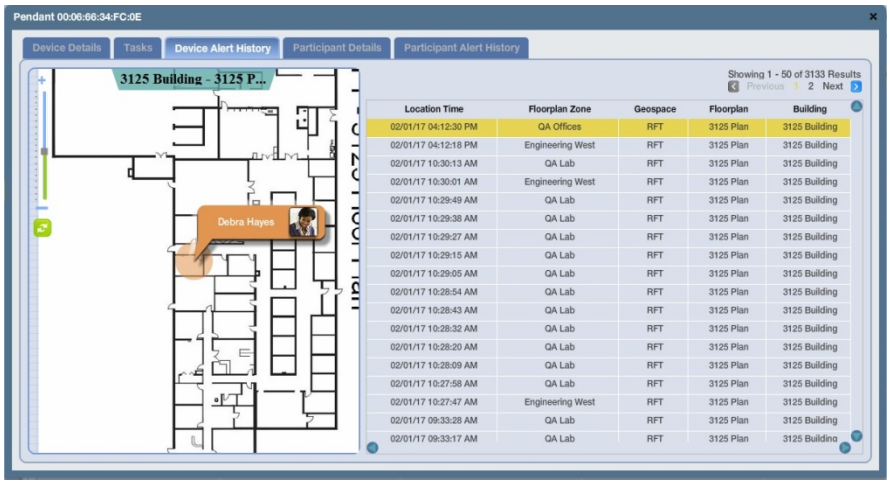
Each Pendant has Extended Information that can be viewed by selecting it from the list of devices and clicking the **View Extended Information** button at the bottom of the screen. This Information can vary by device type and whether or not the device is assigned to something. The contents of extended information is controlled by permissions, so some Administrator accounts may not have access to these features.

For pendants this includes:

- Device Details
- Tasks
- Device Alert History

If currently assigned to a participant, the following will also display:

- Participant Details
- Participant Alert History



Locator Beacons

Locator Beacons are physically deployed in specific locations of a facility. These logical locations are known as Reference Points. Locator beacons are used to generate location information for equipment and participants.

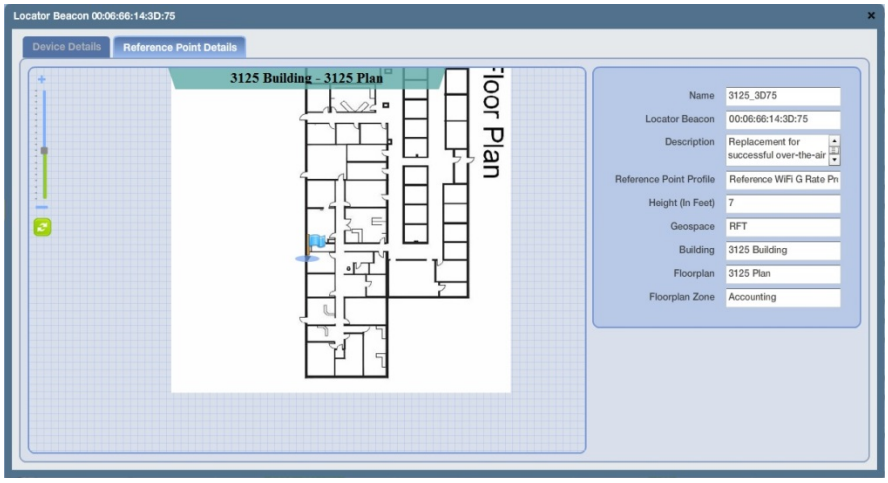
“Available” Locator Beacons are not yet assigned in the Active Campus Configuration, whereas “Assigned” Locator Beacons are already associated to a specific location via a Reference Points in the Active Campus Configuration.

View Extended Information

Each Locator Beacon has Extended Information that can be viewed by selecting it from the list of devices and clicking the **View Extended Information** button at the bottom of the screen. This Information can vary by device type and whether or not the device is assigned to something. The contents of extended information is controlled by permissions, so some Administrator accounts may not have access to these features.

For locator beacons this includes:

- Device Details
- Reference Point Details



Device Tasks

The system provides administrators with certain functions that aid in carrying out routine maintenance of the devices in a way that does not skew the record-keeping capabilities of the system. Depending on the type of device, the number of these functions (referred to as tasks within the system) will differ. Pendants and Equipment Locators have a Tasks tab on the Extended Information popup.

An emergency is a bad time to find out that a device is in need of maintenance. With this in mind, most Facilities schedule regular testing of the Alert functionality of the devices in the system.

- The "**Flag Next Alert as Test**" Task designates the next Alert from the selected device as a "test" alert, meaning that it will be recorded separately from genuine alerts. When running Reports or viewing Dashboards, an administrator will have the option of including or excluding Test alerts from the data.

- Equipment Locators are typically mounted on the piece of equipment that they are intended to track and removal of the

locator from its equipment is normally undesired. The equipment locators can be configured to trigger a "**Tamper Alert**" when they are removed from the mounting bracket. In order to prevent the triggering of such an Alert while performing maintenance on the locator, the system provides the "**Suppress Tamper Alert**" Task. Activating this task prevents the locator from triggering an Alert the next time it is removed from its bracket.

To activate a device task:

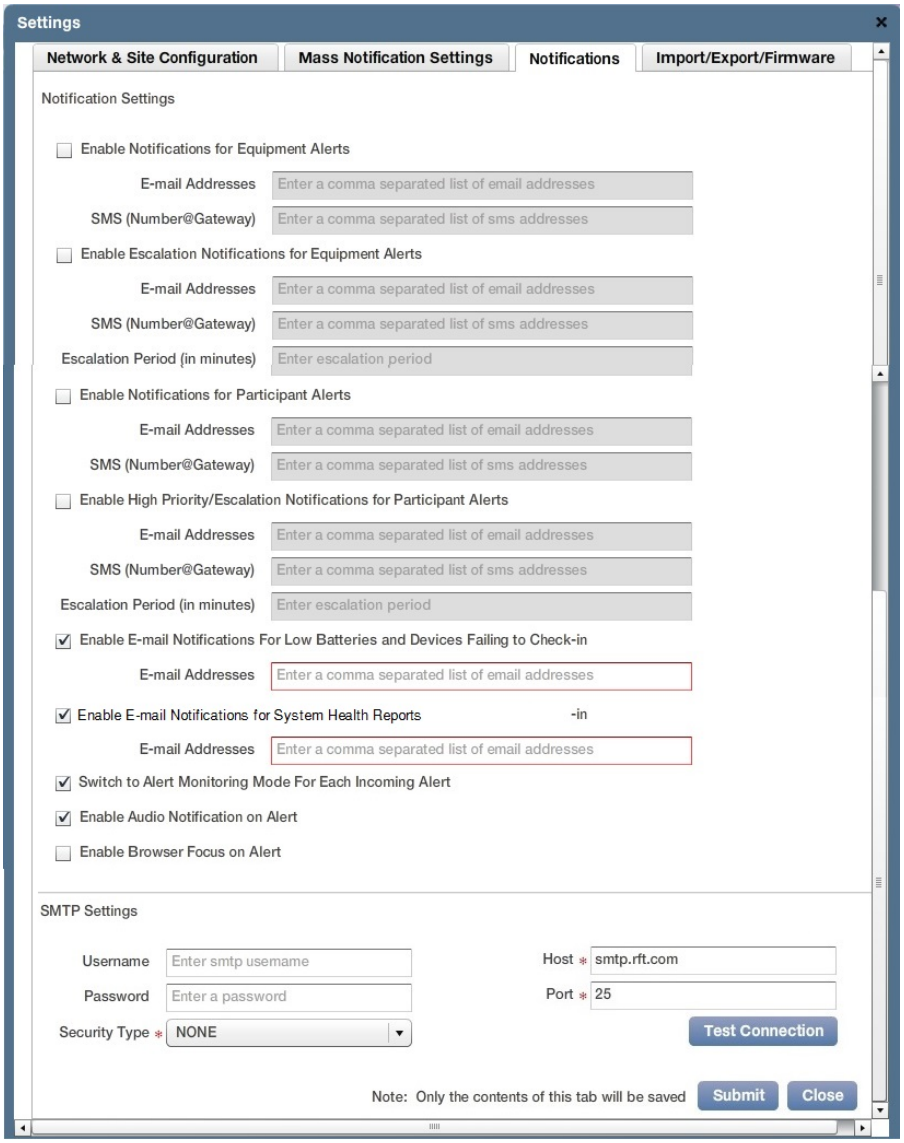
1. Expand the tree structure for **Devices** on the Navigation pane
2. Click the Equipment Locators or Pendants link
1. Find the device to be tested in the list and click to select it
2. Click the **View Extended Information** button
3. Click the **Tasks** tab
4. Click the checkbox at the top of the form for the desired task and identify a date and time for the task to expire
5. Click **Update**
6. The system will now perform the Task for the first Alert that occurs prior to this expiration. Additional Alert events within this period will be reported as normal.

Notification Settings

RTLS has a wide range of notification settings available. To access Settings, click on the Settings button from the Admin User Interface.

To access notification settings:

1. Click the **Settings** button on the Navigation pane
2. Click the **Notifications** tab



NOTE: If Enable Priority Alerts are enabled in the system, notifications pertaining to Priority Alerts will be sent to all E-mail and SMS addresses listed in the “Notifications for Participant Alerts” and “Priority/Escalation Notifications for Participant Alerts” fields.

Email / Escalation

Email Notifications can be sent out when an Alert occurs. Multiple Email addresses can be entered into each field, separated by commas. (ie: “user1@company.com, user2@company.com”).

Escalation emails are emails that are sent out if an Alert goes unacknowledged for the specified number of minutes defined in the escalation period.

System Health Report

Email Notifications can be sent out each month containing a system health report for all pendants, fobs, locator beacons, and equipment locators configured within the system. The report will provide a live snapshot of the battery and communication status of all equipment, as well as a listing of all assigned and unassigned equipment.

By default, the heath check is run on the 1st of every month at 3:00 am.

Multiple Email addresses can be entered, separated by commas. (ie: “user1@company.com, user2@company.com”).

Enable Settings

- Enabling **Switch to Alert Monitoring Mode for Each Incoming Alert** will enter User Mode and view an Alert whenever a new Alert occurs.
- Enabling **Browser Focus on Alert** will bring the supported web browsers to the foreground and make them the active window on a computer. Audio Notification will sound an audible alarm to users that can monitor alerts.

SMTP Settings

For any email to be sent, access to an SMTP server must be provided. Note that SMS Messages use an SMTP Gateway to be sent.

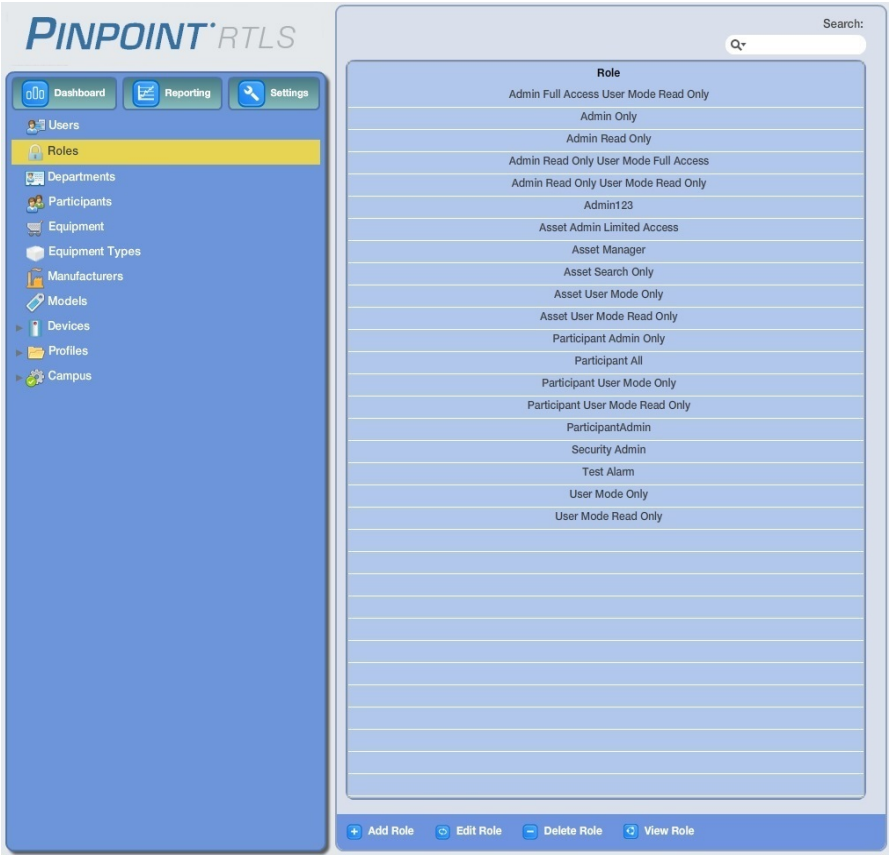
(Format is typically <phone number>@<carrier.com>, Standard text rates apply)

Chapter 3 – System User Configuration

Managing Roles

Roles determine what features a user can and cannot access within the RTLS system. For example, the system administrator could have access to all features, while a security guard may only be able to see and respond to Staff Duress situations, and a regular user may only be able to search for Equipment.

The features are grouped into Permission Sets, which can be set to Disabled, Read-Only, and Full Access levels of access for each Role. Additionally, most Permission Sets can be filtered to restrict access to items from selected Departments, Equipment Types, or Geospaces.



Add Role

When creating a Role, the system administrator must first determine which features the new Role will have access to. Features are grouped into the following Permission Sets (see the *Roles and Permissions Appendix* for further details on which features are in each role):

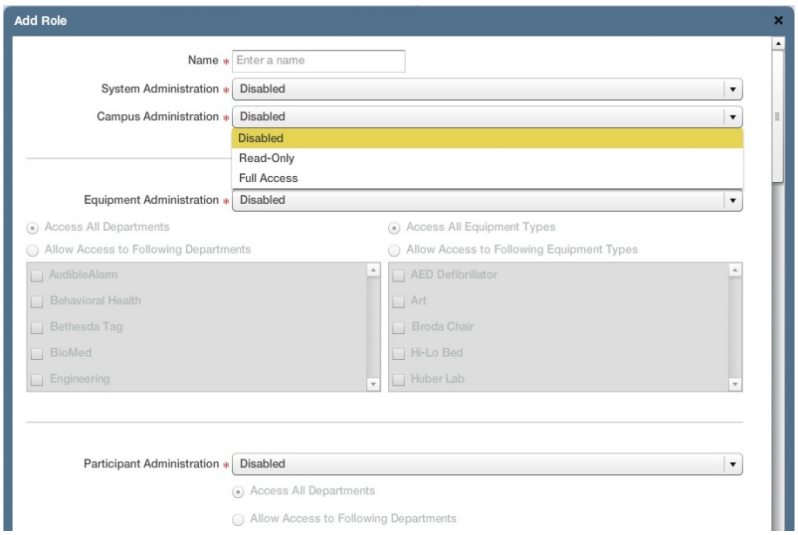
- **System Administration:** System Administration pertains to the features for dashboard management (see *Chapters 2 and 3* for additional details), reporting (see *Chapter 6* for additional details), as well as the overall system management.
- **Campus Administration:** Campus Administration pertains to the features for Configuring Facility Infrastructure (refer to the installation guide for additional details).
- **Asset Administration:** Asset Administration pertains to the features for Configuring Monitored Equipment Types and Equipment (see *Chapter 5* for additional details).
- **Participant Administration:** Participant Administration pertains to the features for Configuring Monitored Departments and Participants (see *Chapter 4* for additional details).

A new role might be added to the system in a situation where different monitoring stations are setup to allow only a select group to acknowledge and clear alerts (i.e.: security), but everyone else can view the alerts.

Another example might be a multiple building school campus where all buildings are monitored by one system, but you only want those in each building to be alerted and respond to the alerts in their building, not to all alerts. In this case, the role would be restricted based on the Geospace location.

To add a role:

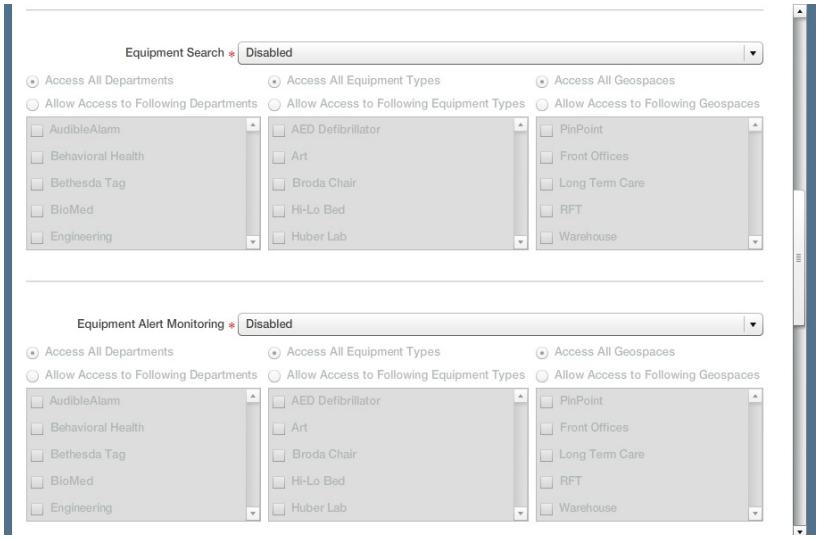
1. Click the **Roles** link on the Navigation pane
2. Click the **Add Role** button



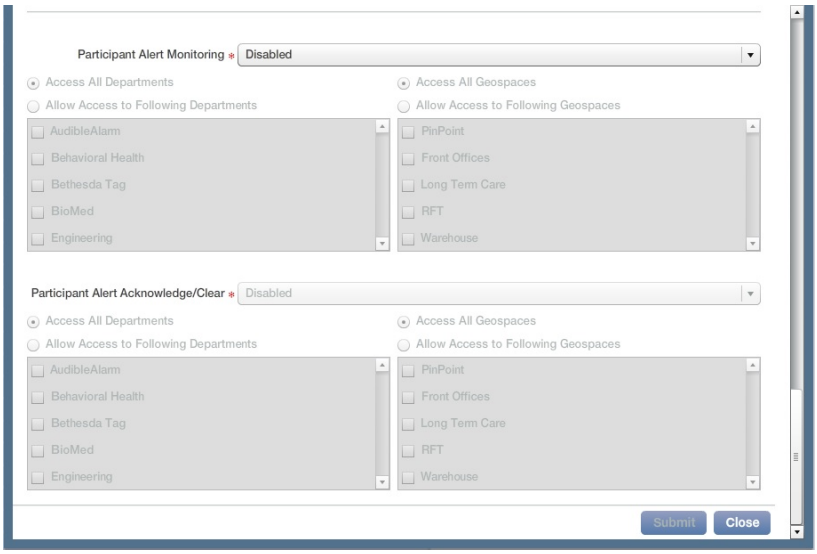
3. Enter a unique **Name** for the new role
4. Using the drop-down boxes, select the **System Administration**, **Campus Administration**, **Equipment Administration**, and **Participant Administration** permission set options

5. Define the Equipment Administration and Participant Administration Alert Monitoring and Alert Acknowledge/Clear criteria
   - **Filtering Permission Sets:** The option of restricting a Role's access based on the location (Geospace specifically) of Alerts, the department, or the type of any equipment involved can also be defined here (refer to the Appendix for default settings for roles/permissions).

Equipment Administration



Participant Administration



6. Click **Submit**

NOTE: If multiple filters are used within one Permission Set (such as limiting by Department and Geospace under Equipment Search), only the elements matching **ALL** selected filters will be displayed.

Edit Role

To edit a user:

1. Click the **Roles** link on the Navigation pane
2. Find the role in the list and click to select that role
3. Click the **Edit Role** button
4. Make the desired changes
5. Click **Submit**

Remove Role

To remove a role:

1. Click the **Roles** link on the Navigation pane
2. Find the role to be removed in the list and click to select that role
3. Click the **Delete Role** button
4. Click **Yes** in the confirmation popup

NOTE: You will not be able to delete a Role that has one or more Users assigned to it.

Managing Users

Users represent the named accounts that can access the RTLS system interface.

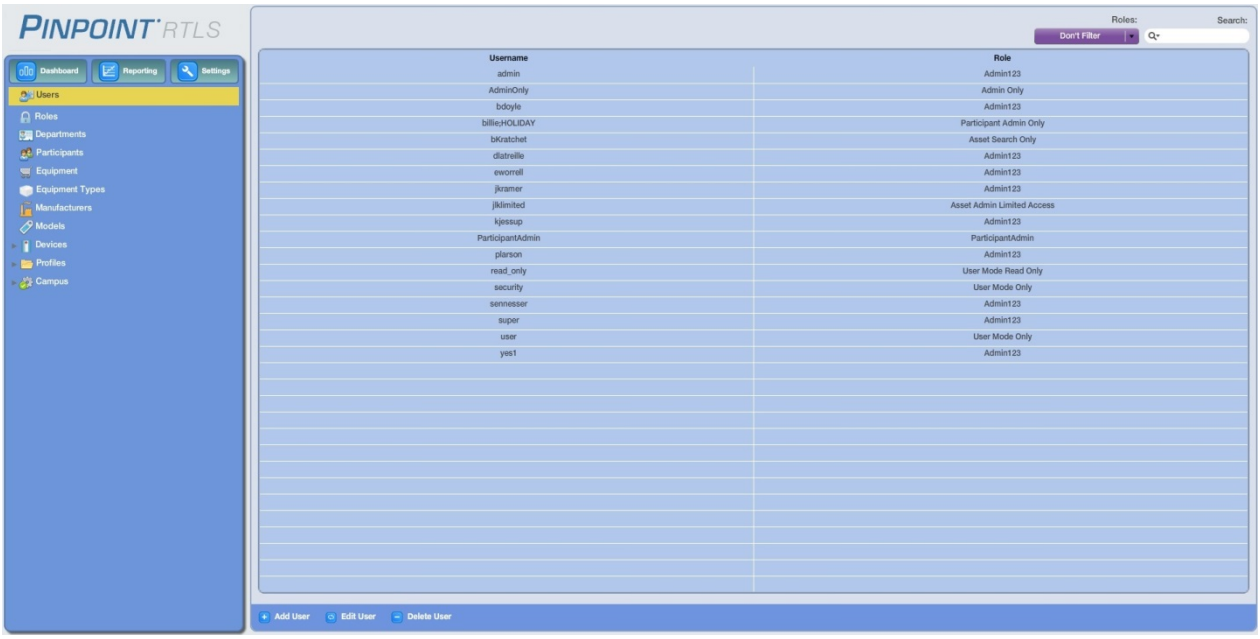
The system supports a role-based permission structure to ensure users have access to appropriate functionality. When an account is created for a given user, that user is assigned a specific Role. These Roles determine what features a user can and cannot access (see *Managing Roles* for more information).

Add User

There are two methods for adding User accounts to the RTLS system:

- **Manually**: Users may be added manually through the RTLS Software and assigned an appropriate role.
- **LDAP**: The RTLS System can also integrate with directory services that support LDAP, such as Active Directory. Groups within such a service can be mapped to specific roles within the system, allowing for the proper allocation of permissions to each user without the need to create new accounts and passwords (see the RTLS Installation Manual for information on how to integrate an existing LDAP directory service).

NOTE: At least one User in the system must be configured to have Full Access to the System Administration privileges.



To manually add a user:

1. Click the **Users** link on the Navigation pane
2. Click the **Add User** button

3. Enter a unique login name (**Username**) for the specific user
4. Enter the user's **Password**
5. Select a **Role** for the User
6. Enter a valid **Email** address that the system will use for communicating with the user
7. Click **Submit**

To integrate an existing user through LDAP:

1. Click the **Users** link on the Navigation pane
2. Click the **Add User** button
3. Check the **Use External Authentication** checkbox if the user is tied to an external LDAP/Active Directory authentication service
4. Enter a unique login name (**Username**) for the specific user
5. Click **Submit**

Edit User

To edit a user:

1. Click the **Users** link on the Navigation pane
2. Find the user in the list and click to select that user
3. Click the **Edit User** button
4. Make the desired changes
5. Click **Submit**

Remove User

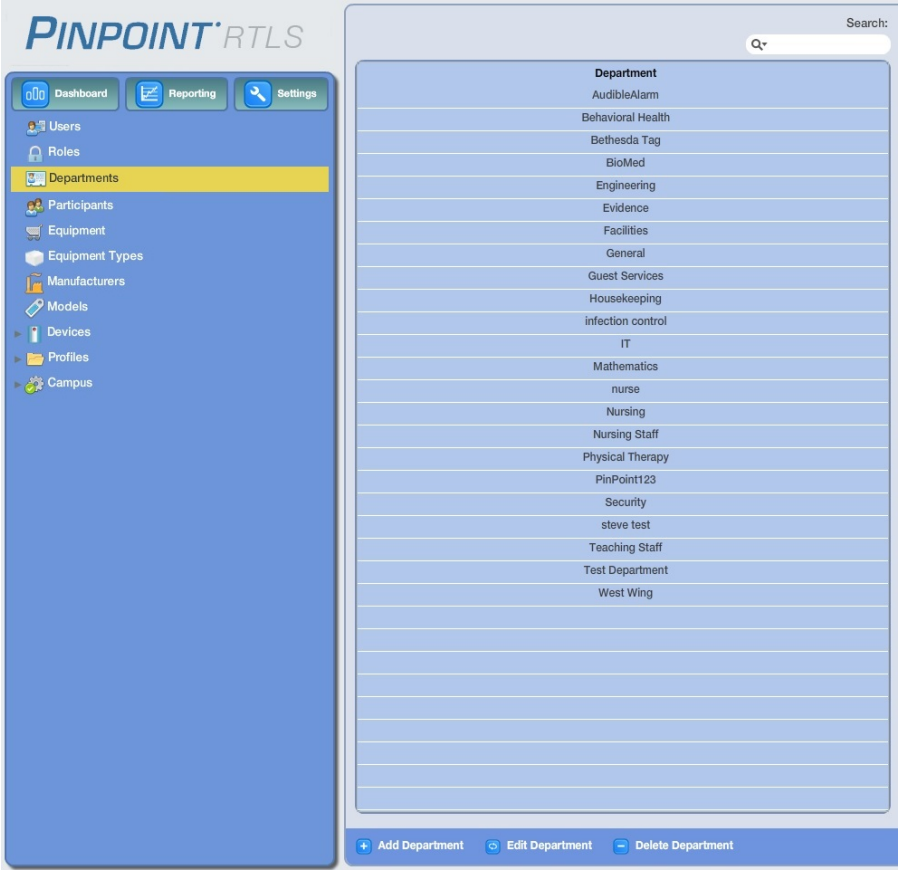
To remove a user:

1. Click the **Users** link on the Navigation pane
2. Find the user to be removed in the list and click to select that user
3. Click the **Delete User** button
4. Click **Yes** in the confirmation popup

NOTE: You will not be able to delete a User if you are logged in as that User, or if it is the last User with Full Access System Administration privileges.

Managing Departments

Departments are used to organize and group Equipment and Participants logically in the system. Defining departments speeds up the process of adding Equipment and Participants, and also provides opportunities for more granular searching and reporting.



Add Department

To add a department:

1. Click the **Departments** link on the Navigation pane
2. Click the **Add Department** button

3. Enter a unique **Name** for the new role
4. If applicable, enter a description
5. Click **Submit**

Edit Department

To edit a department:

1. Click the **Departments** link on the Navigation pane
2. Find the department in the list and click to select it
3. Click the **Edit Department** button
4. Make the desired changes
5. Click **Submit**

Remove Department

To remove a department:

1. Click the **Departments** link on the Navigation pane
2. Find the department to be removed in the list and click to select it
3. Click the **Delete Department** button
4. Click **Yes** in the confirmation popup

NOTE: You will not be able to delete a Department that has one or more Participants or Equipment assigned to it.

Chapter 4 – Pendant / Fob Configuration

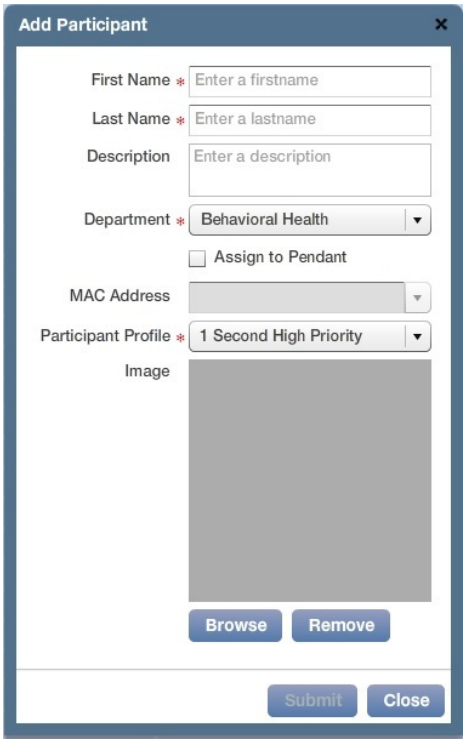
Managing Participants

Participants are those staff members who are registered in the RTLS system for staff duress protection purposes. A Participant's information profile consists of basic information such as their first name, last name, and a photo. Once Participants are registered, they can then be associated to a specific Pendant and monitored for staff duress events.

Add Participants

To add a participant:

1. Click the **Participants** link on the Navigation pane
2. Click the **Add Participant** button



3. Enter a the First **Name** and **Last Name** for the new staff member
4. If applicable, enter a description
5. Select the **Department** the participant is assigned to
6. By selecting the **Assign to Pendant** and entering the **MAC Address** of the pendant, the participant can immediately be associated to a specific pendant
7. Select the **Participant Profile** (for example, you may have setup a "Test" profile that when activated will only display on the security laptop and not alert on all stations)
8. If applicable, upload an **Image** using the **Browse** button
9. Click **Submit**

Edit Participant

To edit a participant:

1. Click the **Participants** link on the Navigation pane
2. Find the participant in the list and click to select it
3. Click the **Edit Participant** button
4. Make the desired changes
5. Click **Submit**

Remove Participant

To remove a participant:

1. Click the **Participants** link on the Navigation pane
2. Find the participant to be removed in the list and click to select it
3. Click the **Delete Participant** button
4. Click **Yes** in the confirmation popup

NOTE: If a Participant associated to a Pendant is deleted from the system, that participant's pendant association is discontinued, and the pendant automatically becomes available within the system for other Participant to utilize.

View Extended Information

Additional information about a participant can be viewed by selecting a participant and clicking the **View Extended Information** button at the bottom of the screen.

This Extended Information can include Participant Details, Participant Alert History, Device Details, Tasks, and Device Alert History (this information can differ from participant information in environments where pendants are exchanged between participants).

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Chapter 5 – Equipment Locator Configuration

Managing Equipment Types

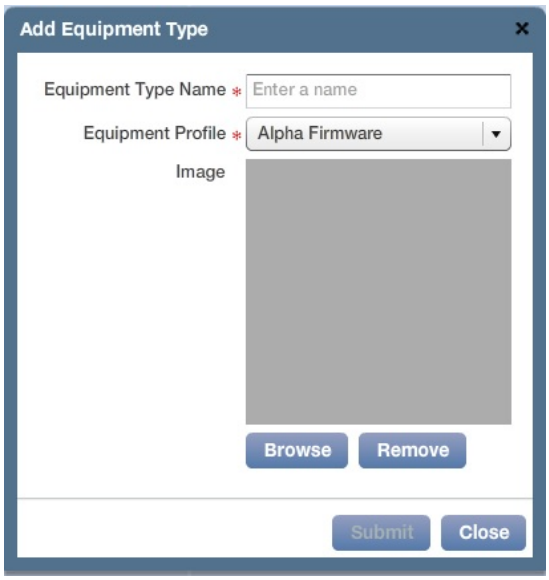
Equipment Types are generic categories in the RTLS system for logical equipment grouping (like wheelchair).

Before adding any Equipment, it is necessary to define the Equipment Types within your organization. For instance, a site may have several unique models of wheelchair, but they all could be considered a wheelchair equipment type. By creating and using Equipment Types, more granular searching and reporting can be performed.

Add Equipment Types

To add equipment types:

1. Click the **Equipment Types** link on the Navigation pane
2. Click the **Add Equipment Type** button



3. Enter a unique **Equipment Type Name**
4. Select the appropriate **Equipment Profile**
5. If applicable, upload an **Image** using the **Browse** button
6. Click **Submit**

Edit Equipment Types

To edit equipment:

1. Click the **Equipment Types** link on the Navigation pane
2. Find the type of equipment in the list and click to select it
3. Click the **Edit Equipment Type** button
4. Make the desired changes
5. Click **Submit**

NOTE: Editing a Model's Equipment Type will also change the Equipment Type of any Equipment currently using the Model.

Remove Equipment Types

To remove equipment types:

1. Click the **Equipment Types** link on the Navigation pane
2. Find the type of equipment to be removed in the list and click to select it
3. Click the **Delete Equipment Type** button
4. Click **Yes** in the confirmation popup

NOTE: Before an Equipment Type can be deleted, no models can be using that type. Models using the type must be re-assigned before deleting.

Managing Manufacturers

Manufacturers are used to identify who made the equipment in the system.

Before adding any equipment, it is necessary to define the various Manufacturers of the equipment within your organization.

Add Manufacturers

To add manufacturers:

1. Click the **Manufacturers** link on the Navigation pane
2. Click the **Add Manufacturers** button

3. Enter the manufacturers **Name**
4. Click **Submit**

Edit Manufacturers

To edit manufacturers:

1. Click the **Manufacturers** link on the Navigation pane
2. Find the manufacturer in the list and click to select it
3. Click the **Edit Manufacturer** button
4. Change or update the name
5. Click **Submit**

NOTE: Editing a Model's Manufacturer will also change the Manufacturer of any Equipment currently using the Model.

Remove Manufacturer

To remove manufacturers:

1. Click the **Manufacturers** link on the Navigation pane
2. Find the manufacturer to be removed in the list and click to select it
3. Click the **Delete Manufacturer** button
4. Click **Yes** in the confirmation popup

NOTE: Before a manufacturer can be deleted, no models can be using that manufacturer. Models using the manufacturer must be re-assigned before deleting.

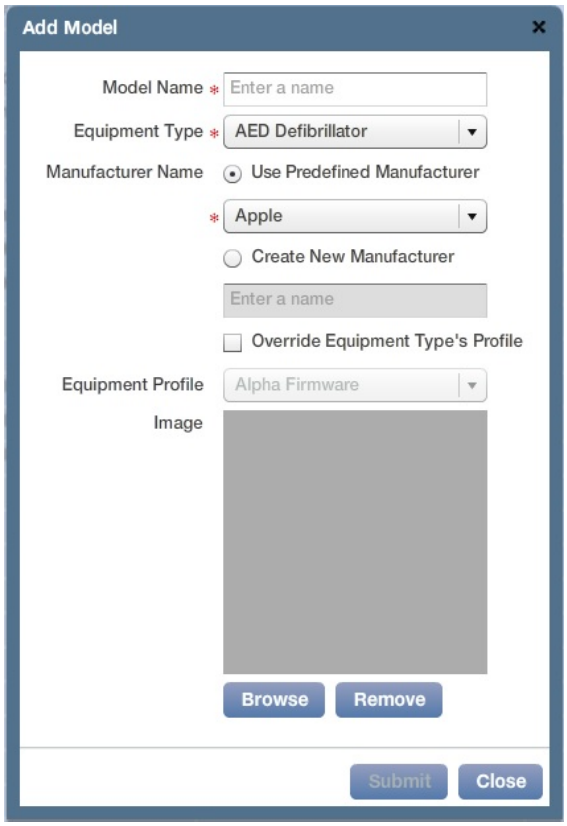
Managing Models

Before adding any equipment, it is necessary to define the models within your organization. For instance, a Manufacturer (Invacare) may have several unique models of wheelchair (Tracer, Tracer IV, etc), but they're all made by Invacare. By creating and using Models, more granular searching and reporting can be performed.

Add Models

To add models:

1. Click the **Models** link on the Navigation pane
2. Click the **Add Model** button



3. Enter the **Model Name**
4. Select the **Equipment Type** from the drop-down list
5. To use an existing manufacturer, click the **Use Predefined**

Manufacturer radio button and then select the **Manufacturer Name** from the drop-down

6. To add a manufacturer to the system, click the **Create New Manufacturer** radio button and then enter the new **Manufacturer Name**
7. To override the equipment type profile information, check the **Override Equipment Type's Profile** box and select a new **Equipment Profile**
8. If applicable, upload and **Image** of the model using the Browse button (a model image helps distinguish the equipment by overriding the equipment type Image and is used if the equipment does not have its own image, or the equipment type does not have an image to represent it)
9. Click **Submit**

Edit Models

To edit models:

1. Click the **Models** link on the Navigation pane
2. Find the model name in the list and click to select it
3. Click the **Edit Model** button
4. Make the desired changes
5. Click **Submit**

Remove Models

To remove models:

1. Click the **Models** link on the Navigation pane
2. Find the model to be removed in the list and click to select it
3. Click the **Delete Model** button
4. Click **Yes** in the confirmation popup

NOTE: Before a model can be deleted, no equipment can be using that model. Equipment using the model must be re-assigned before deleting.

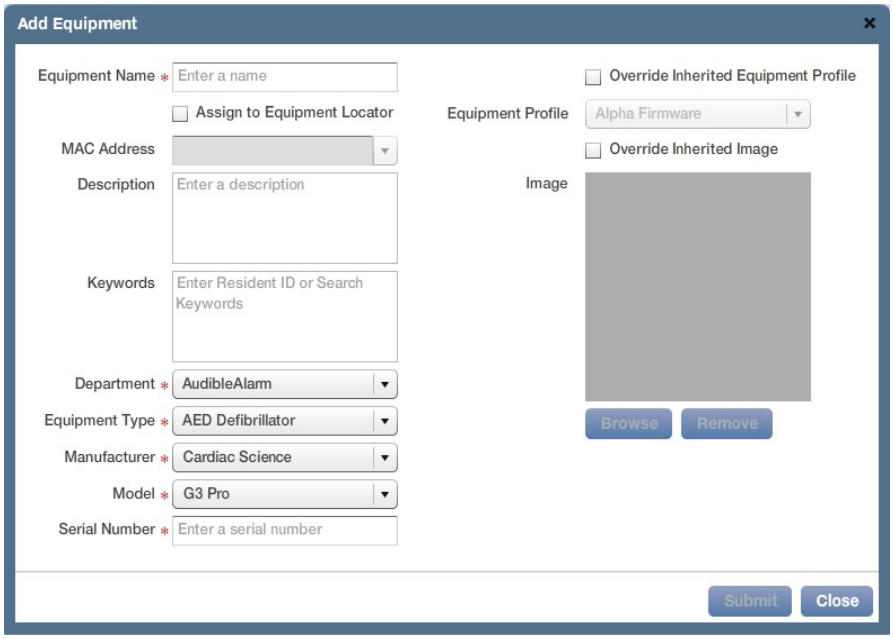
Managing Equipment

Equipment is a tangible good added to the RTLS system for equipment locating. End users are provided with a search interface to determine the current and historical locations, as well as availability of equipment. Equipment locators also have the ability to provide an alert notification when tampered with.

Add Equipment

To add equipment:

1. Click the **Equipment** link on the Navigation pane
2. Click the **Add Equipment** button



3. Enter a unique **Equipment Name**
4. By selecting the **Assign to Equipment Locator** and entering the **MAC Address** of the locator, a piece of equipment can immediately be associated to a specific locator
5. If applicable, enter a **Description**
6. In order for the equipment to be searchable, enter any applicable **Keywords**
7. Select the **Department** the equipment is assigned to
8. Using the drop-down lists, select the **Equipment Type**, **Manufacturer**, and **Model** for the equipment being added

9. Enter a **Serial Number**
10. To override the equipment type and model profile information, check the **Override Inherited Equipment Profile** box and select a new **Equipment Profile**
11. Likewise, to override the default image, click the **Override Inherited Image** checkbox and upload a new **Image** using the **Browse** button
12. Click **Submit**

Copy Equipment

For adding similar equipment, select an existing piece of equipment and use the Copy button, this will copy everything except the name and serial number.

To copy equipment:

1. Click the **Equipment** link on the Navigation pane
2. Find the piece of equipment to be copied in the list and click to select it
3. Click the **Copy Equipment** button
4. Enter a unique **Name**
5. Enter the **Serial Number**
6. Click **Submit**

Edit Equipment

To edit equipment:

1. Click the **Equipment** link on the Navigation pane
2. Find the piece of equipment in the list and click to select it
3. Click the **Edit Equipment** button
4. Make the desired changes
5. Click **Submit**

Remove Equipment

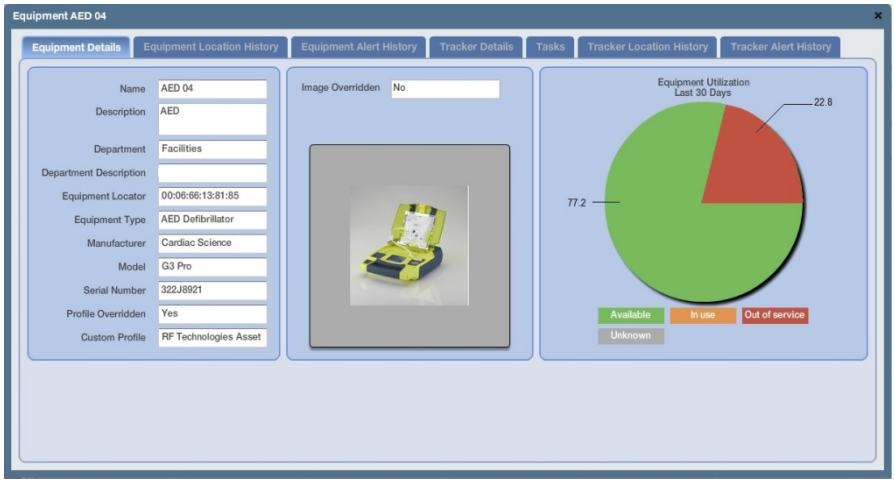
To remove equipment:

1. Click the **Equipment** link on the Navigation pane
2. Find the piece of equipment to be removed in the list and click to select it
3. Click the **Delete Equipment** button
4. Click **Yes** in the confirmation popup

View Extended Information

Extended Information for Equipment can be viewed by selecting a piece of equipment and clicking the **View Extended Information** button at the bottom of the screen.

Extended Information for Equipment includes Equipment Details, Equipment Location History, Equipment Alert History, Tracker Details, Tasks, Tracker Location History, and Tracker Alert History (this information can differ from equipment information in environments where trackers are exchanged between equipment).



Chapter 6 – Reporting

Introduction

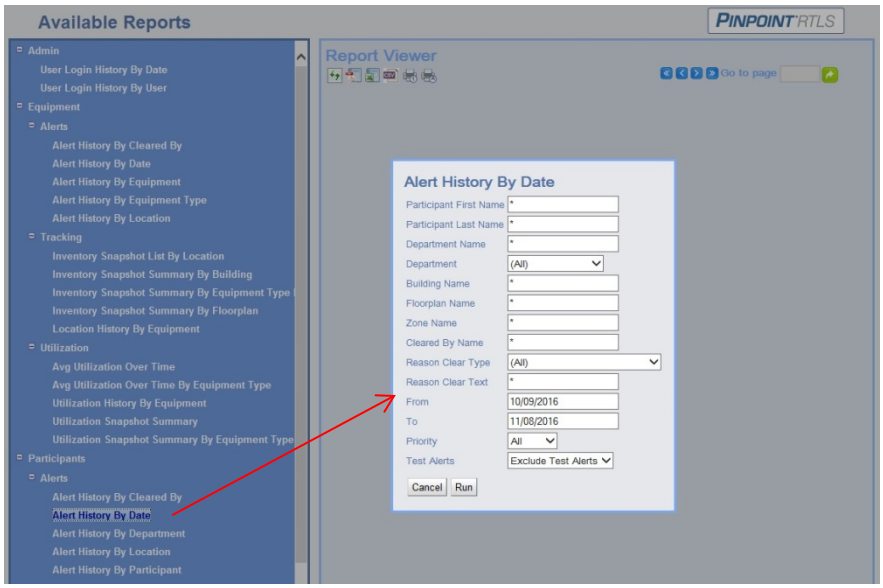
The RTLS system has a very powerful reporting portal with reports in the following categories:

- Admin (user login information)
- Equipment (alerts, tracking, and utilization information)
- Participants (alert information)
- Devices (battery status information for equipment locators, locator beacons, and pendants)

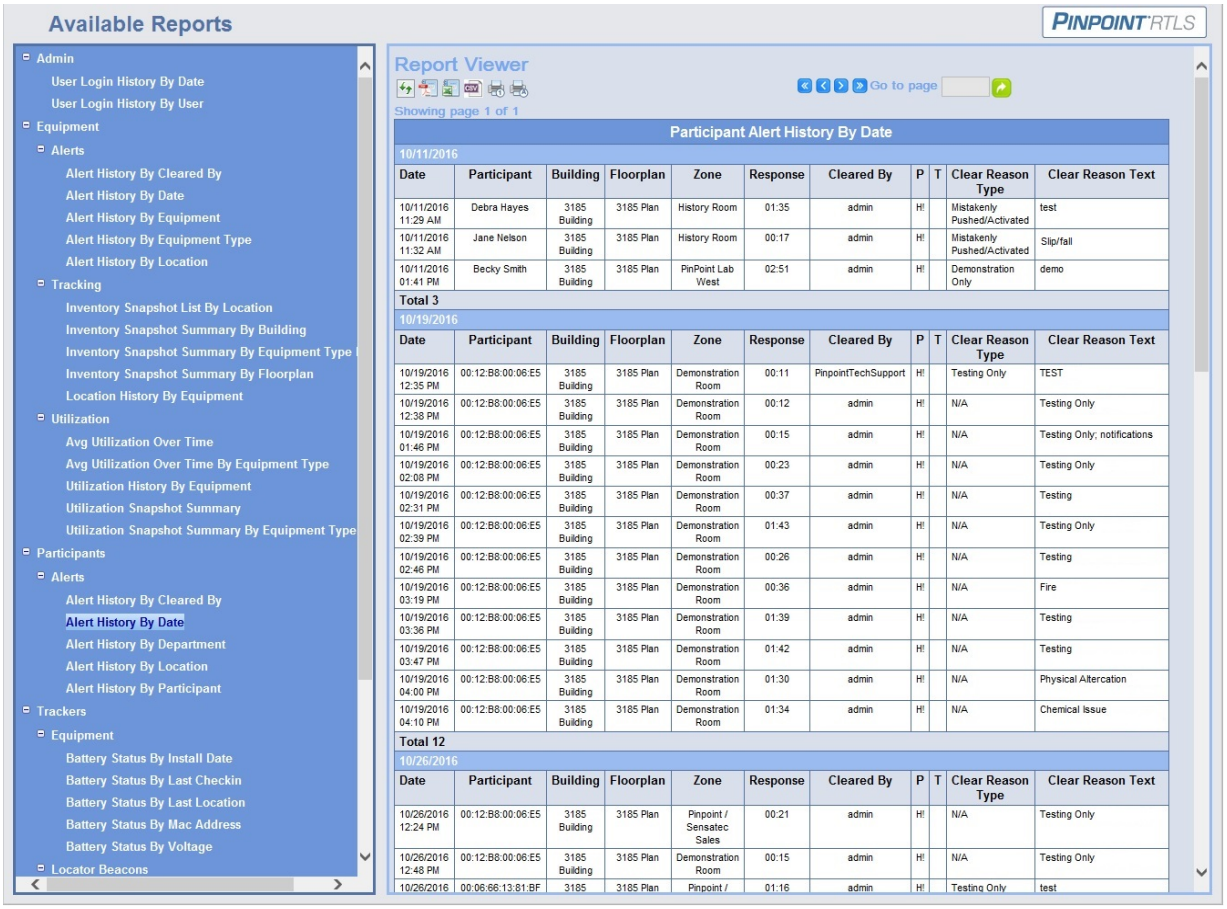
Generating a Report

To generate a report:

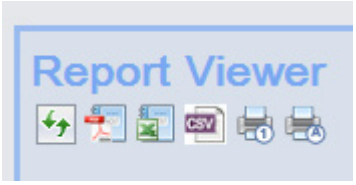
1. Click the **Reporting** button on the Navigation pane
2. The Available Reports page is displayed
3. Select a **report** from the list of all of the available reports
4. Click on the report name to begin generating it
5. When the pop-up for configuring report parameters is displayed, enter the appropriate information



6. Click **Run** to generate the report



7. From here you can view the information, refresh the data, print the current report page, print all the pages, or choose to export the data using the **Report Viewer** icons at the top of the page.



8. Repeat for all desired reports
9. Once done, close the page to return to the dashboards

Export a Report

Reports can be exported to PDF, Microsoft Excel, or .CSV file formats

To export a report:

1. Generate the report
2. Clicking on the appropriate export icon in the Report Viewer
3. When prompted, Save the file (default name is the *{name of the report}.{file extension}*
4. Repeat for all desired reports
5. Once done, close the page to return to the dashboards

Appendix

Roles / Permissions

Each sub-role listed here can be combined with other sub-roles to grant additional abilities to a role. Further, each sub-role features a level of access control. Some sub-roles contain filters to restrict information access. This makes a powerful, flexible, role-based access control system for administrators to control who can view and modify information based on the needs of the end user.

Role Permission Set:	System Administration	Campus Administration	Equipment Administration	Participant Administration
Filters:	None	None	Department, Equipment Type	Department
Access Control:	Disabled Read Only Full Access	Disabled Read Only Full Access	Disabled Read Only Full Access	Disabled Read Only Full Access
Admin Mode Software Components				
Settings	Access Control	No Access	No Access	No Access
Site Tree				
Users	Access Control	No Access	No Access	No Access
Roles				
Departments				
Participants	No Access			Access Control
Equipment			Access Control	No Access
Equipment Types				
Manufacturers				
Models				
Campus		Access Control	No Access	
Devices and Profile Tree Nodes				
Devices -> Locator Beacons	Access Control	Access Control	No Access	No Access
Profiles -> Reference Point Profiles				
Devices -> Pendants		No Access		Access Control
Profiles -> Participant Profiles				
Devices -> Asset Tags			Access Control	No Access
Profiles -> Asset Profiles				
Dashboard				
Admin	Access Control	No Access	No Access	No Access
System Health				
Unknown Device Reports				
Miscellaneous				
Participant Alerts	No Access			Access Control
Equipment Alerts			Access Control	No Access
Equipment Locations				
Equipment Utilization				
Reporting				
Admin	Access Control	No Access	No Access	No Access
Equipment	No Access		Access Control	
Participants			No Access	Access Control
Devices -> Equipment	Access Control		Access Control	No Access
Devices -> Pendants			No Access	Access Control
Devices -> Locator Beacons				No Access

Role Permission Set:	Equipment Search		Equipment Alert Monitoring		Equipmentt Alert ACK/Clear	
Filters:	Department, Equipment Type, Geospace		Department, Equipment Type, Geospace		Department, Equipment Type, Geospace	
Access Control:	Enabled	Disabled	Enabled	Disabled	Enabled	Disabled
User Mode Software Components						
Equipment / Equipment Alerts	No Access		Access Control		Access Control	
Equipment Locating	Access Control		No Access		No Access	

Role Permission Set:	Participant Alert Monitoring		Participant Alert ACK/Clear	
Filters:	Department, Geospace		Department, Geospace	
Access Control:	Enabled	Disabled	Enabled	Disabled
User Mode Software Components				
Pendant / Participant Alerts	Access Control		Access Control	

Equipment Status

The Equipment's Status can be set by pushing and holding the Equipment Locator's button, cycling through the available states, and then releasing the button when the desired state is indicated by the LED.

Status	LED Color	Meaning
Available	Green	Locator is available for use
In Use	Orange	Locator is being used
Out of Service	Red	Locator is not available for use

Revision History

Revision	Change
A	Released
B	**Updated**: for v2.0.3 (software bug fixes)
C	**Updated**: for v2.0.5 (software bug fixes)
D	**Updated**: for v2.0.6 (new features)
E	**Updated**: for v2.0.7 (new features)
F	**Updated**: for v2.0.8 (new features)
G	**Updated**: for v2.0.9 (new features)
H	**Updated**: for v2.1 (new features)
I	**Updated**: Document to latest format **Updated**: for v2.5 (new features)
J	**Updated:** for v3.0 (mass notification)
K	**Removed:** System configuration information (“Network and User Configuration” and “Facility Infrastructure Configuration”) and moved it to the installation guide (0510-0378) where the process is actually done **Updated:** for v3.2 (system health check report)

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