

## **GLOSSARY**

### **ADMINISTRATORS:**

The people who manage the Account and sets up all the Users and Strategies.

### **USER:**

A lone worker who uses the app.

### **SUPERVISOR:**

The person who receives a User's escalation messages if they have not checked in. This could be a manager or buddy.

### **GROUP:**

A team of people typically using the same lone working Strategy and have the same Supervisor.

### **STRATEGY:**

Defines how often a lone worker needs to check in and the escalation rules associated with this (i.e. who gets notified and how).

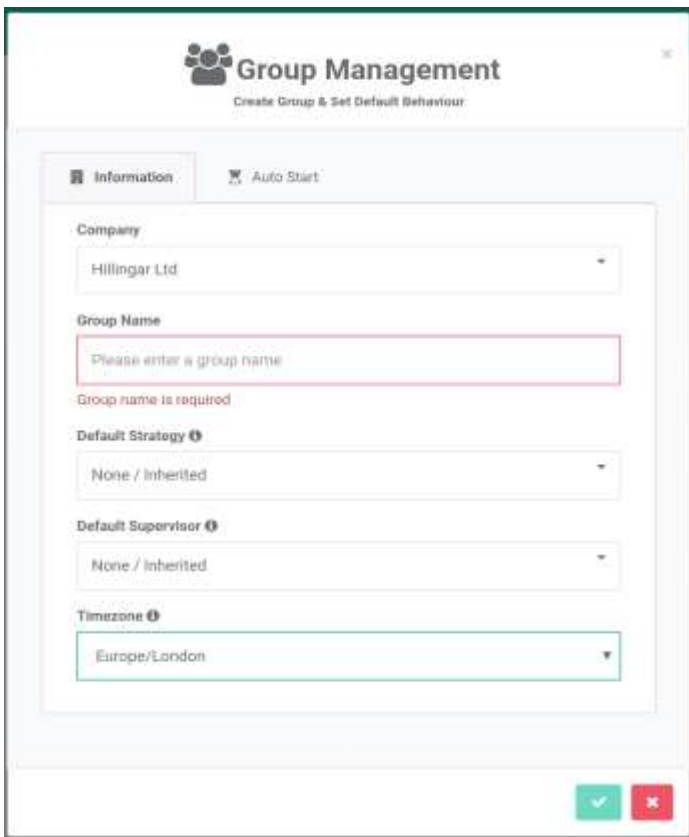
### **PIN:**

The 4 digit code that a User needs to enter into the app to confirm that they are safe or when they want to end a lone working session.

**Creating New Groups**



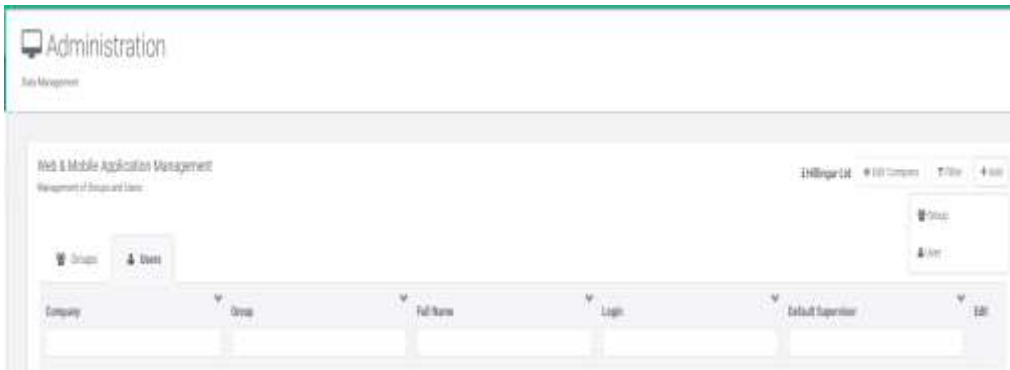
Administrators can create **new Groups** by clicking on Add then choosing New Group in the Groups and Users section of the dashboard.



Enter a name in the red box then choose a default strategy for this Group and a default Supervisor.  
 Enter the Timezone for this Group.  
 You can also set up an Auto Start for this Group (Please see instructions for User set up).  
 When finished click on the green tick.

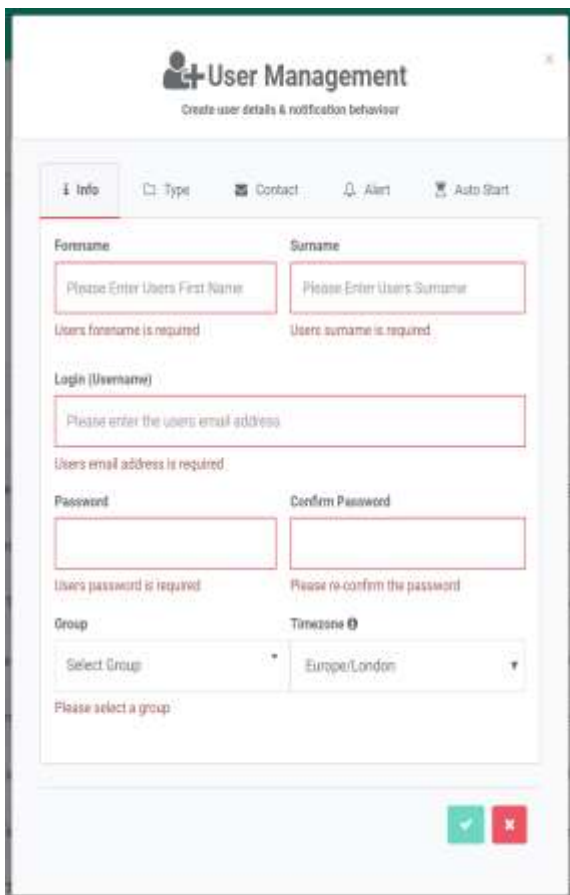
Groups can be used for teams of people who have different working patterns or Supervisors. You can allocate a Strategy or Supervisor at Group level

**Creating New Supervisors and Users**



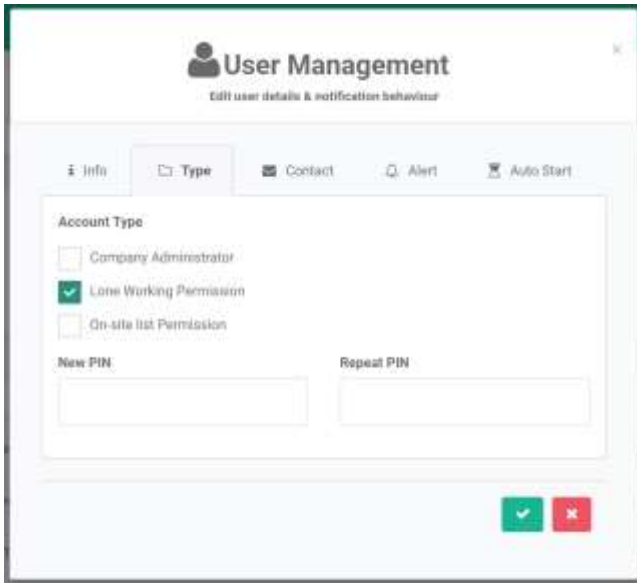
Administrators can create **new Users** by clicking on Add then choosing New User in the Groups and Users section of the dashboard.

**Note:** We recommend you create the Supervisors first then the Users.



Enter the User's name in the first two boxes. Enter User's email address in Login (Username) box. Create a password for them and enter in both Password boxes. Select a Group for the User from the Drop down box. (You can always create another one if needed). Finally choose the correct Timezone: (Europe/London) for the UK

## Quick Start Guide - Admin



**User Management**  
 Edit user details & notification behaviour

Info | **Type** | Contact | Alert | Auto Start

Account Type

Company Administrator

Lone Working Permission

On-site list Permission

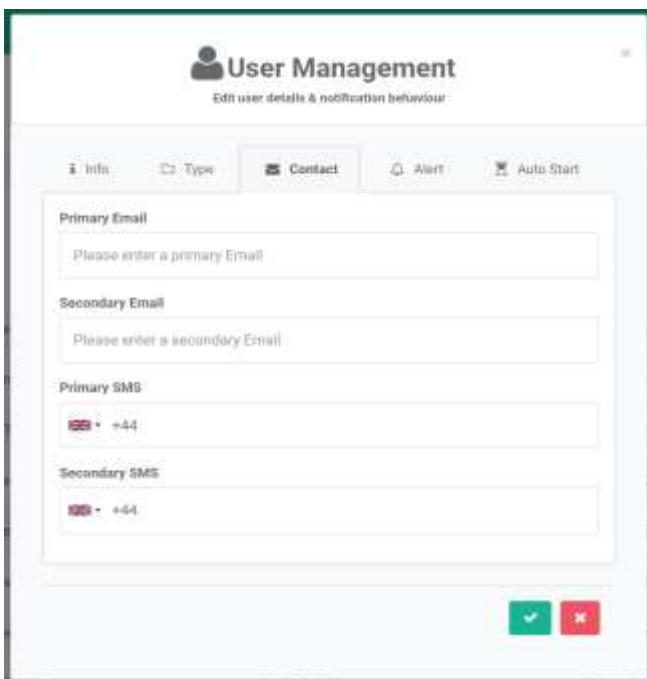
New PIN:

Repeat PIN:

Next Click on the Type tab:

*Lone working permission* must be ticked to enable the user to start / stop lone working sessions in the app.

You must choose a PIN number for each User and enter this in both PIN boxes. This is what the User will use to confirm they are safe and end sessions within the app. If you are creating a Supervisor and they do not use the app do not click the Lone Working Permission box (so this does not go towards your User count).



**User Management**  
 Edit user details & notification behaviour

Info | Type | **Contact** | Alert | Auto Start

Primary Email  
 Please enter a primary Email

Secondary Email  
 Please enter a secondary Email

Primary SMS  
 +44

Secondary SMS  
 +44

Next Click on the Contact tab:

Enter the User's email address. This is used to send notifications to them.

Enter the User's mobile number in Primary SMS box. This is used for sending SMS alert messages to them.

(The Secondary contact details are not often used unless the User has additional devices.)



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The screenshot shows the 'User Management' interface with the 'Alert' tab selected. The 'Default Strategy' dropdown is set to '2hr Checkin, Escalate 20min GPS' and the 'Default Supervisor' dropdown is set to 'None / Inherited'. There are green and red confirmation buttons at the bottom right.

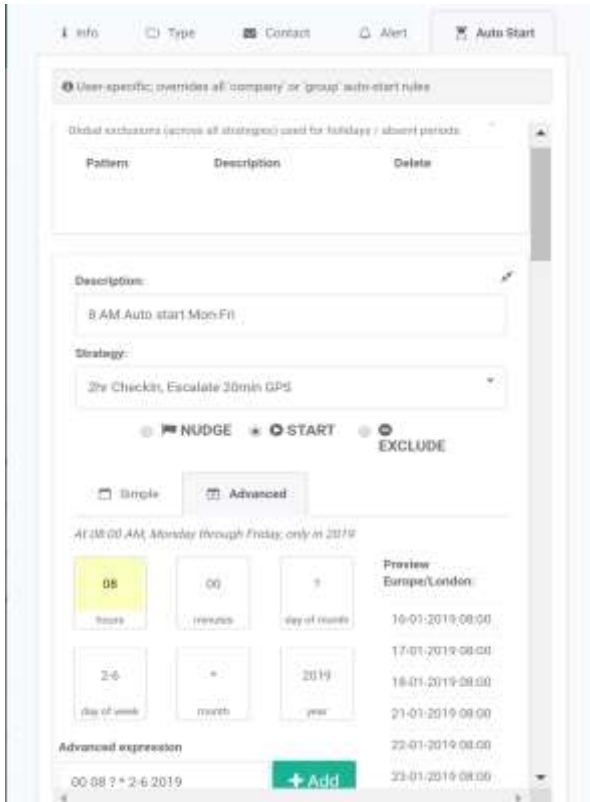
Next Click on the Alert tab:  
Choose a Default Strategy from the drop down menu. This is how often you want the User to check in.  
Choose a Default Supervisor for the User from the drop down menu. If you choose None/Inherited this will pick the default Supervisor from the Group the User is attached to.

**NOTE:** It is not necessary to complete this information for a Supervisor if they do not use the app. If they do use the app, you need to ensure that they have another contact from the list and do not inherit as escalation messages would go to themselves.

The screenshot shows the 'User Management' interface with the 'Auto Start' tab selected. It displays 'Global Exclusions' with a table and a new entry '8 AM Auto-start Mon-Fri' added to the list. There are green and red confirmation buttons at the bottom right.

Pattern	Description	Delete
8 AM Auto-start Mon-Fri		+

Click on the Auto Start tab if you would like to set up automatic starting of the app for the User. This is useful if they are forgetful or they do consistent shifts.  
Enter a description in the green box – in this example the session will start automatically every day (Mon to Fri) at 8AM.  
Then click on the + sign.



Click on the START dial and then the Advanced tab.

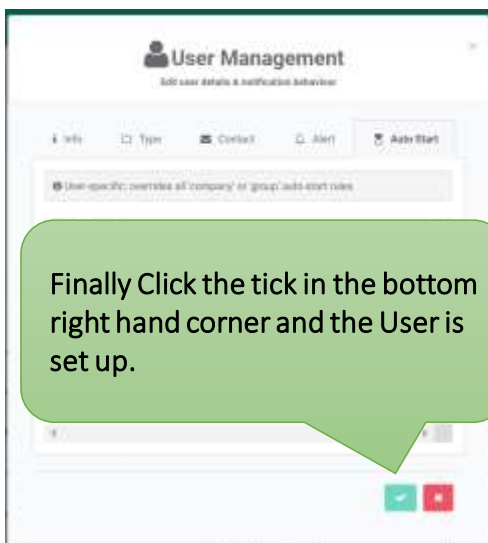
Enter the time you want to start in Hours and Minutes. Leave day of Month with ?. In Day of week add day numbers (Sunday is day 1 so 2-6 is Mon to Fri). Leave Month with \* and enter Year in Year box.

The details you have created will appear above these boxes (At 08.00 AM Monday through Friday only in 2019)

Click on the Add button

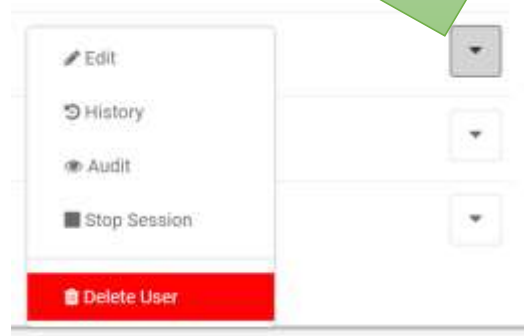


**NOTE:** Whilst this is a useful tool for regular working patterns it can become cumbersome to administer as you need to add exclusions by clicking on the exclude dial and then choose all the days the User will not be working (i.e. Bank Holidays and personal holidays). If you do not keep this up to date the app will start as usual even if the User is not working.



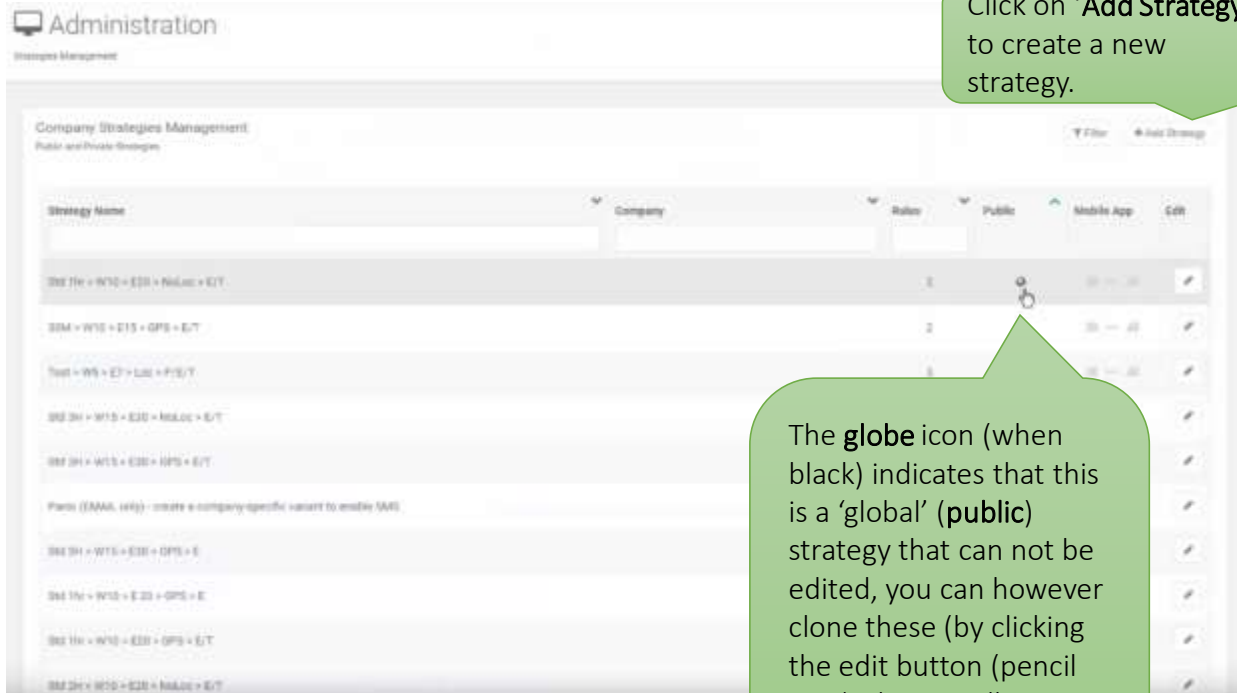
Finally Click the tick in the bottom right hand corner and the User is set up.

You can delete a User by clicking on the drop down menu next to their name on the Dashboard and choosing Delete User.














### Creating a Strategy

**Strategies** enable you to set up custom lone working rules: how often to check-in, whether GPS should be captured and escalations (who to contact when the user is late checking-in). This can depend on the risk associated to the lone worker roles (jobs) in your company.



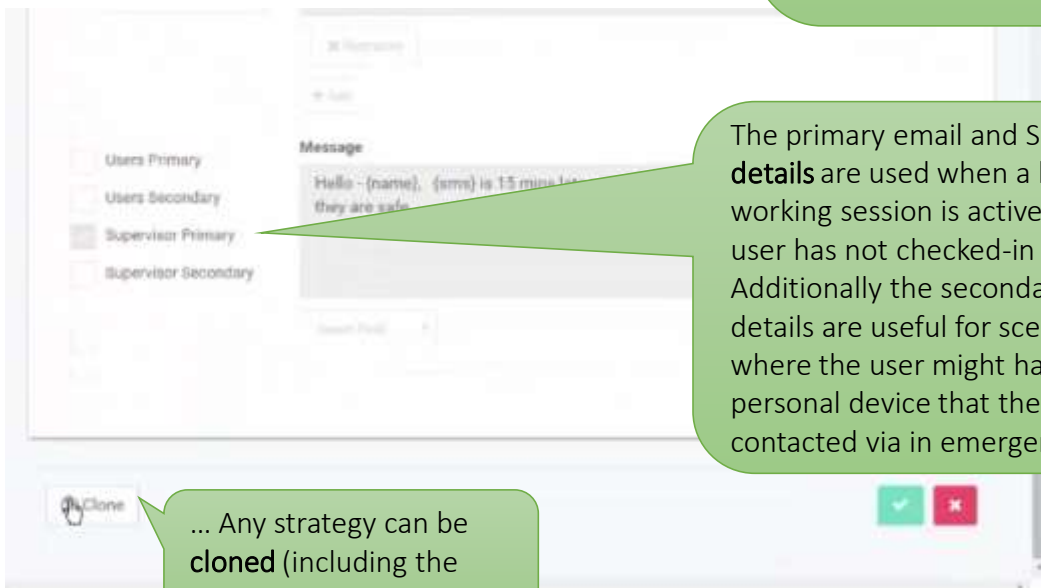
Administration  
Strategies Management

Company Strategies Management  
Public and Private Strategies

Strategy Name	Company	Rules	Public	Mobile App	Edit
001 1hr + W10 + E20 + N60sec + E/T		1			
002 1hr + W10 + E15 + GPS + E/T		2			
Test + W5 + E7 + L10 + P15/T		1			
003 3hr + W15 + E20 + N60sec + E/T					
004 3hr + W15 + E20 + WFS + E/T					
Paris (EMEA, etc) - create a company-specific variant to enable SMS					
005 3hr + W15 + E20 + GPS + E					
006 1hr + W10 + E20 + GPS + E					
007 1hr + W10 + E20 + GPS + E/T					
008 3hr + W10 + E20 + N60sec + E/T					

Click on 'Add Strategy' to create a new strategy.

The **globe** icon (when black) indicates that this is a 'global' (**public**) strategy that can not be edited, you can however clone these (by clicking the edit button (pencil icon), then scrolling to the bottom...



Users Primary  
 Users Secondary  
 Supervisor Primary  
 Supervisor Secondary

Message  
 Hello - (name), (sms) is 15 mins late they are safe

Clone

The primary email and SMS **contact details** are used when a lone working session is active and the user has not checked-in on time. Additionally the secondary contact details are useful for scenarios where the user might have a personal device that they can be contacted via in emergencies.

... Any strategy can be **cloned** (including the public strategies).



### Strategies

**Default strategies** can be assigned to a user, group and/or company. These are inherited, for example if you assigned a custom 'Warehouse strategy' to a group, then all users in that group will inherit that strategy – unless the user has a specific strategy that overrides it.

The precedence is User → Group → Company

It's advised to set a strategy at group level, so that the strategy can be changed in one place then everyone in the group will pickup that default strategy. If you require more granular control, then set it at user level.

How frequently the lone worker needs to **check-in** to the app, typically hourly (depends on the risk)

Give the Strategy a meaningful name so the Users understand what they should do.

The **GPS (map)** feature can drain the battery, so it's advised to not set this too frequently, to preserve the lone-workers battery.

Each platform handles location differently. Android enables you to specify how frequently to poll and which type of providers to try to use - both combined affect battery usage. iOS only lets you specify the target accuracy, more accuracy uses more battery. When there's no data connection the location is discarded until a subsequent sample is attempted.

Android - High = GPS if available, otherwise uses Cell/Wifi/Passive. The frequency helps reduce battery usage.  
iOS - High = 10m, Med = 100m, Low = 200m accuracy and ignores the frequency slider.

Mobile Options:

- Show on mobile
- 1. Check-In every 2 hr:
- Panic
- Shake to trigger

Option is

5 Min Push (with 1 action rule).

If Late By: 5 Minutes

Escalation Rule: 5 Min Push

The **Add button** will add a button to the MyTeamSafe app.

You should define a specific Strategy for a Panic situation. For this strategy you need to click the Panic button. this will add a panic button to the MyTeamSafe app. Optionally you can also turn on the '**shake**' mode, which requires the lone-worker to shake the device three times quickly to activate the panic strategy.





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An **escalation** indicates what must be done when the lone worker is late checking-in. You can target messages to the lone worker or supervisor, to their mobile app (push notifications), email, or text (SMS). Each message can be fully customised via templates.

10 mins late EMAIL (with 1 action rule)

If Late By: 10 Minutes

Escalation Rule Name: 10 mins late EMAIL

Action Type: Email

Specify email address:

Remove

Add

Message:

Users Primary

Users Secondary

Supervisor Primary

Supervisor Secondary

Insert Field

Add Action Remove Action

Choose when escalation should occur

Choose how the escalation will be sent

Choose who the escalation should be sent to

Public strategies will contain pre populated messages but you can change these to suit your requirements by choosing information from the insert field

You can add another method of sending information for this escalation by clicking Add Action (i.e. also send a Push Notification).



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30 mins late EMAIL/TXT (with 4 action rules).

If Late By

30 Minutes

Escalation Rule Name

30 mins late EMAIL/TXT

Action Type

Email

Additional Email Recipients

Specify email address

✕ Remove

+ Add

Users Primary

Users Secondary

Supervisor Primary

Supervisor Secondary

Message

<p>Hello {supervisorName}</p>

<p>{name} is 30 mins late responding to MyTeamSafe. Please check that they are safe.</p>

<p>Email: {email} </p>

Action Type

Sms

Additional SMS Recipients

+44

✕ Remove

+ Add

Users Primary

Users Secondary

Supervisor Primary

Supervisor Secondary

Message

MyTeamSafe ESCALATION; {name}, {sms}; Location: {gpsSummary}

Insert Field

+ Add Action

- Remove Action

Action Type

Push

Push notification message length should be restricted to a maximum of 200 characters. Note that fields will be substituted and could increase the message length further than what's reported here, in this case, the message received by the mobile device could be truncated, you are advised to keep the message brief with the most important information at the beginning.

User

Supervisor

Message (length: 265)

MyTeamSafe ESCALATION. Hello {name}. Your supervisor is {supervisorName}. Please check-in or contact {supervisorName} immediately. Email: {supervisorEmail}. You can still send an SMS with a 4 digit PIN (i.e. SAFE 1234).

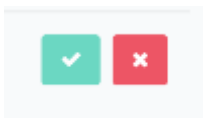
Insert Field

+ Add Action

- Remove Action

This is an example of the late check in escalation (after the grace period has expired).  
The Supervisor gets an email and a text message letting them know the User is late and gives them a link to their latest GPS location

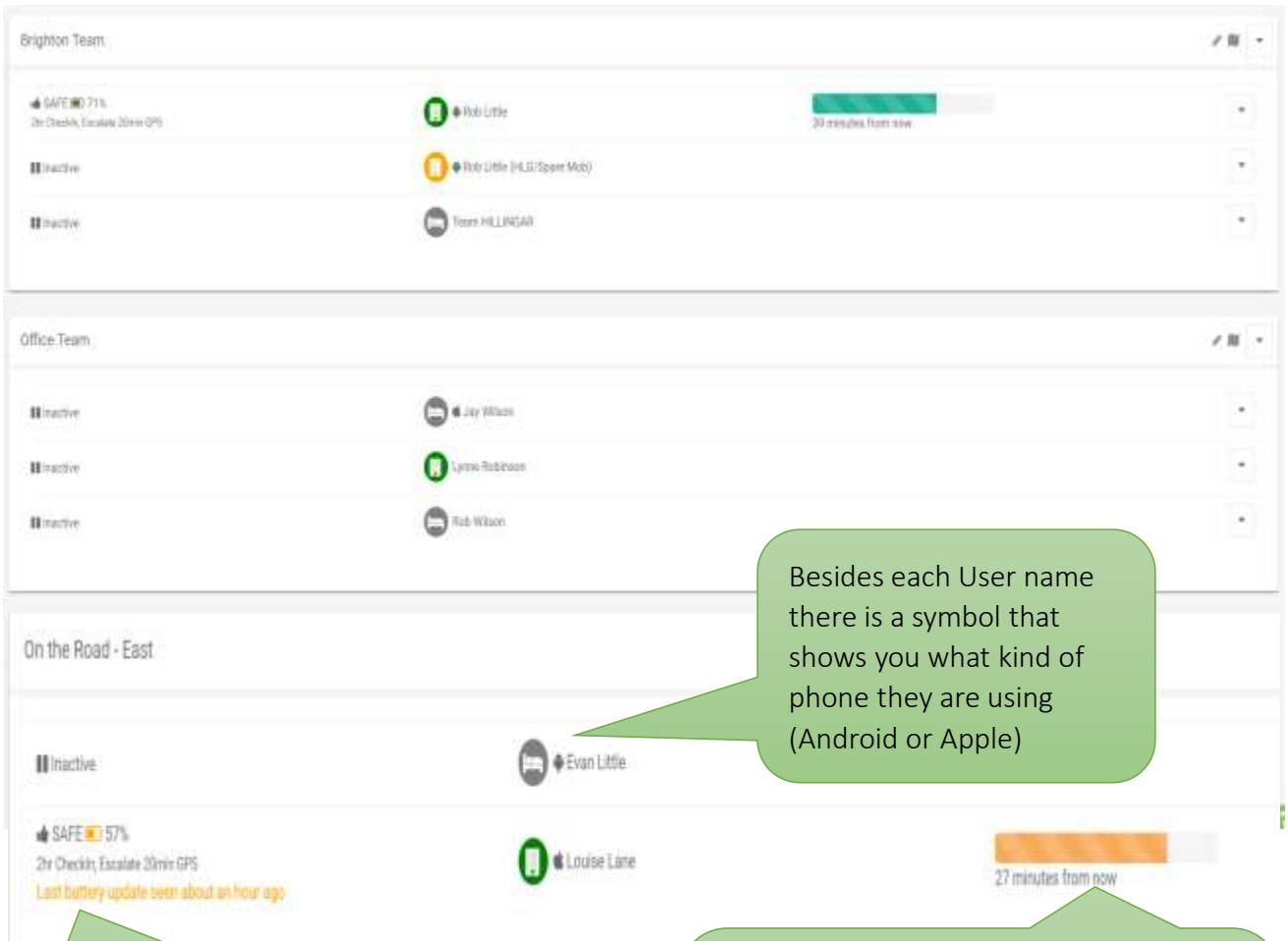
The User also gets a Push notification to let them know their Supervisor has been informed



When you have completed the set up of the Strategy click the green tick and this will save it and it is ready for use.

### Lone Working Dashboard

The Dashboard gives an overview of all the lone workers and their status



The dashboard displays the following information for each worker:

- Team:** Brighton Team, Office Team, On the Road - East
- Status:** SAFE (71%), Inactive
- Battery:** 71%, 57%
- Strategy:** 2hr Checkin, Escalate 20min GPS
- Location:** 20 minutes from now, 27 minutes from now
- User Name:** Rob Little, Rob Little (HLG/Sprint Mob), Team HILLINGDALE, Jay Wilson, Lynne Robinson, Rob Wilson, Evan Little, Louise Little
- Phone Type:** Indicated by a phone icon (Green for Android, Amber for Apple)

Besides each User name there is a symbol that shows you what kind of phone they are using (Android or Apple)

The above information shows the User status (i.e. SAFE), their battery life in % (57%) and the strategy they are using. It also lets you know when it last recorded the battery status.

When a lone worker has started a lone working session, the administrators can **graphically** see how long before they are due to check-in and whether they are late and whether escalations have occurred (push notifications, email, text / SMS)

These symbols represent where the User is (if you wish to use the Fire Roster). Green = On site, Amber = Off site and Grey = Absent



The Pencil symbol allows you to edit information. The Flag symbol shows you a map of where the Users are.



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### Lone Working Dashboard



If you click on the flag icon next to your Company Name, a map (like below) will appear showing all Users, their status and where they are on the map. You may need to zoom out to pick up all users if they are scattered over a large area.

Alternatively, if you click on the flag icon next to a Group name it will show only the Users in that Group

**Company Monitoring**  
Aggregated Map for Hilltop LM

Monitoring Users	Escalations	Company Users
2 active	0 0.0% ↓	11

- 1 Rob Little  
▲ SAFE
- 2 Rob Little (HLS/Spare Mob)  
DEFAULT
- 3 Timon HILLINGAR  
DEFAULT
- 4 Jay Wilson  
DEFAULT
- 5 Lynne Robinson  
DEFAULT
- 6 Rob Wilson  
DEFAULT
- 7 Evan Little  
DEFAULT
- 8 Louise Lane  
▲ SAFE
- 9 Elizabeth Hobbell  
DEFAULT
- 10 Sarah Little  
DEFAULT
- 11 Valeria Zhukova  
DEFAULT

**User Map**  
Refresh Every: 1 Minute

Map Satellite

You can then click on an Individual User and see just their details.

### Lone Working Dashboard



If you click on the drop down menu next to the Company you can get an Audit report with the activity of all Users.

### Usage report

12/01/2019 - 16/01/2019 (Europe/London)

Please note that these statistics are based on the time that the session started, if a lone working session spans multiple days then all

#### Usage overview for entire period

##### Company summary

Name	Sessions (Total)	Sessions (Panic)	Sessions (Escalated)	Sessions (Escalated to supervisor)	Escalation Emails	Escalation SMS	Escalation Push
Hillingar Ltd	15	0	5	0	5	5	5

##### Group summary

Name	Sessions (Total)	Sessions (Panic)	Sessions (Escalated)	Sessions (Escalated to supervisor)	Escalation Emails	Escalation SMS	Escalation Push
Brighton Team	11	0	5	0	5	5	5
Office Team	1	0	0	0	0	0	0
On the Road - East	3	0	0	0	0	0	0
Technical Team	0	0	0	0	0	0	0

##### Users in group Brighton Team

Name	Sessions (Total)	Sessions (Panic)	Sessions (Escalated)	Sessions (Escalated to supervisor)	Escalation Emails	Escalation SMS	Escalation Push
ianm@hillingar.com	0	0	0	0	0	0	0
rob.little@hillingar.com	0	0	0	0	0	0	0
rob.little@myteamsafe.com	11	0	5	0	5	5	5

#### Overview of sessions started per day

The status next to each color is reported for highest sessions on the day.

Colour	Meaning
White	No session (Blank)
Green	Session with no escalation
Blue	Escalated to user
Yellow	Escalated to supervisor
Red	At least one panic

Each number in a cell represents the number of sessions started on that day.

User in Brighton Team	12/1	13/1	14/1	15/1	16/1
ianm@hillingar.com					
rob.little@hillingar.com					
rob.little@myteamsafe.com	2	1	2	1	2

User in Office Team	12/1	13/1	14/1	15/1	16/1
ianm@hillingar.com					
ianm.watson@myteamsafe.com				1	
rob.little					

User in On the Road - East	12/1	13/1	14/1	15/1	16/1
ianm@hillingar.com					
ianm.watson@myteamsafe.com					
ianm@hillingar.com					

User in Technical Team	12/1	13/1	14/1	15/1	16/1
ianm@hillingar.com					
ianm.watson@myteamsafe.com					
ianm@hillingar.com					

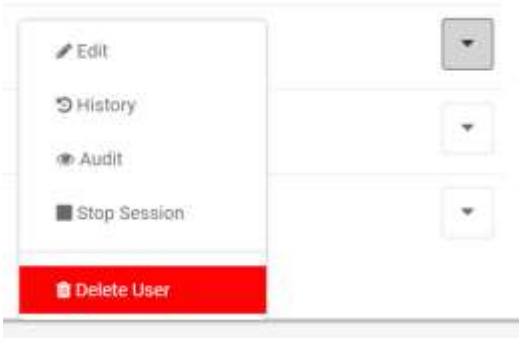
This summary shows who has been using the app, how often and what sort of escalations have occurred.



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If you click on the drop down box next to a User you will get this menu



This **eye** symbol allows you to view the recent GPS locations for a User for either the current active session, or their last session. Included in the report is a table showing what escalations have occurred.

### User Location & Event Log

Rob Little

Map Satellite

Audit Information

Session started at: 16/01/2019 10:13:02  
Next update due in: about an hour from now

When	Audit Description
16/01/2019 10:13:02	User indicated Safe - via app
16/01/2019 08:17:19	User indicated Started - via app

The Pins on the map show where and when a GPS location has been recorded. The latest Pin is green and historical ones are amber.



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### History

This Icon shows you the history of a User

You can vary the information shown by clicking on the buttons below. (i.e. show only notes or just escalations etc)

### User Audit for rob.little@myteamsafe.com

Rob Little - 09/01/2019 - 16/01/2019

You can customise what details are shown in the audit below by toggling the switches as applicable, for example to hide maps, or to only show notes of a certain severity:

**Lone Working Sessions**  
 Started  Stopped  Safe

**Notes**  
 Normal  Warning  Urgent

**Noteworthy**  
 Late  Pin  Escalated

**Notifications**  
 Email  SMS  Push  
Please note that push notifications are not currently audited

**Location**  
 Map

**Map** Satellite

The Pins on the map show where and when a GPS location has been recorded. The latest pin is green. The blue pin records the start location. Grey pins are all other recorded locations for that session. The size of the circle denotes the accuracy of the location recorded

### User Audit for rob.little@myteamsafe.com

Rob Little - 01/01/2019 - 16/01/2019

You can customise what details are shown in the audit below by toggling the switches as applicable, for example to hide maps, or to only show notes of a certain severity:

**Lone Working Sessions**  
 Started  Stopped  Safe

**Notes**  
 Normal  Warning  Urgent

**Noteworthy**  
 Late  Pin  Escalated

**Notifications**  
 Email  SMS  Push  
Please note that push notifications are not currently audited

**Location**  
 Map

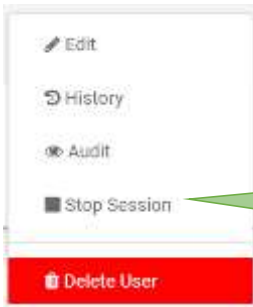
10/01/2019 09:47:42 normalNormal note created by user 'Going to 44'  
 06/01/2019 10:04:32 normalNormal note created by user 'Off to watch football'



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If a User has forgotten to end a session and is not working the next day you can end their session for them by clicking on this icon from the drop down menu next to their name



This is a **support** icon (which is located in the bottom right hand side of the dashboard). Once you press this you can email the support desk with any queries.

