MyTeamSafe
Keeping lone working staff and your business safe
www.myteamsafe.com safe@myteamsafe.com

Quick Start Guide - Admin

GLOSSARY

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

USER:
A lone worker who uses the app.

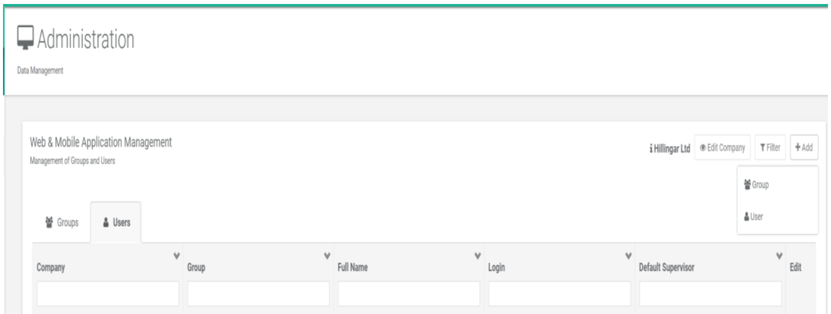
SUPERVISOR:
The person who receives a User's escalation messages if they have not checked in. This could be a manager or buddy.

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

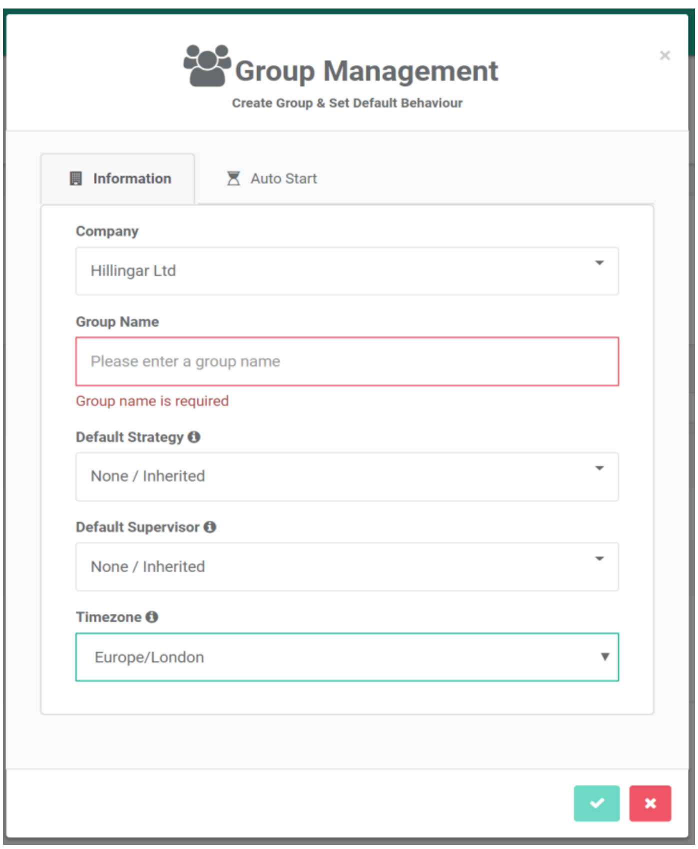
STRATEGY:
Defines how often a lone worker needs to check in and the escalation rules associated with this (i.e. who gets notified and how).

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



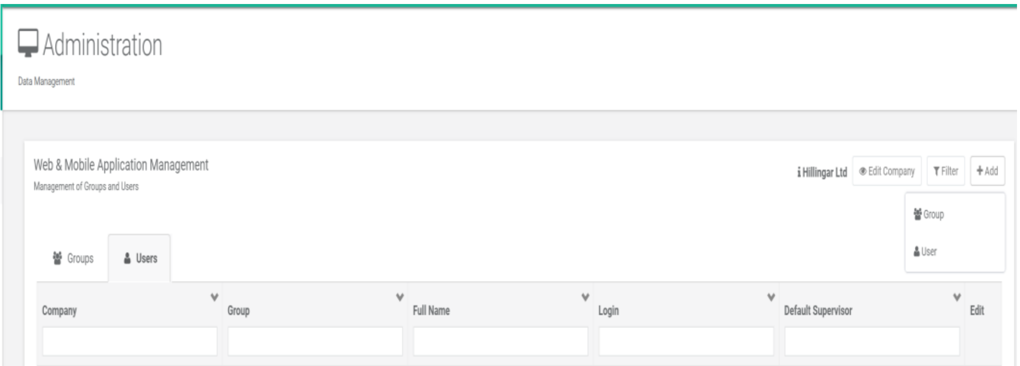
Administrators can create **new Groups** by clicking on Add then choosing New Group in the Groups and Users section of the dashboard



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.

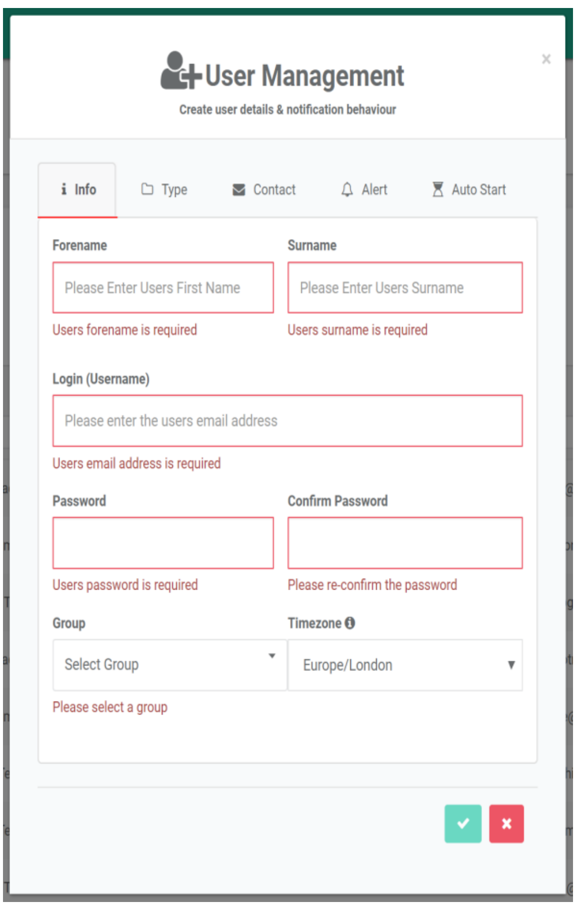
Creating New Supervisors and Users

This section shows you how to add a single user. See the end of the document for how to BULK add users.

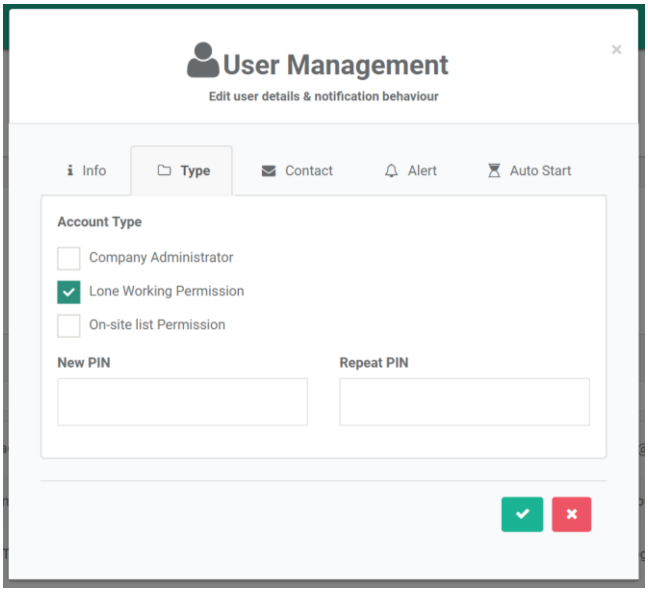


Administrators can create **new Users** by clicking on Add then choosing New User in the Groups and Users section of the dashboard.

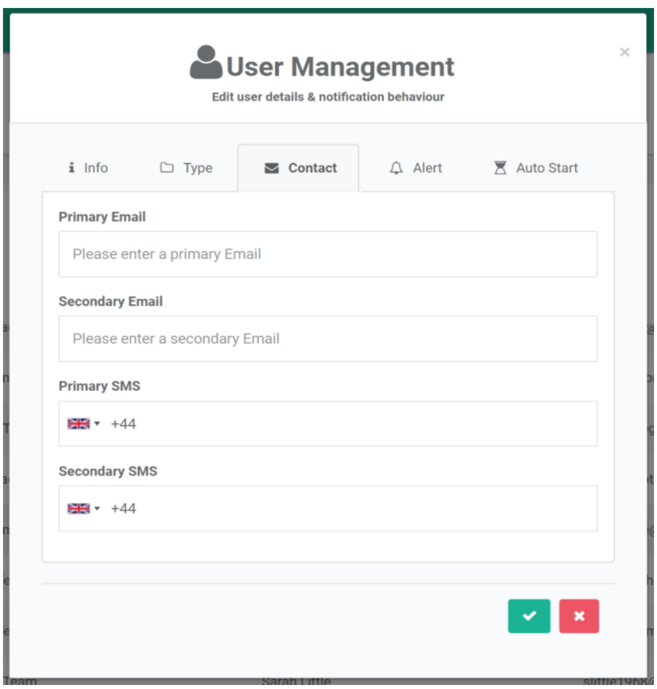
Note: We recommend you create the Supervisors first then the Users.



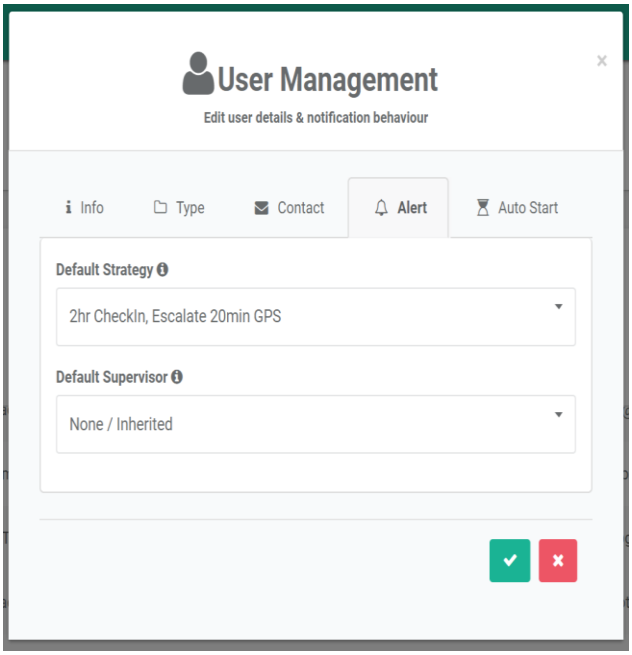
Enter the User's name in the first two boxes. Enter User's email address in Login (Username) box. Create a password for them and enter in both Password boxes. Select a Group for the User from the Drop down box. (You can always create another one if needed). Finally choose the correct Time zone: (Europe/London)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



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).

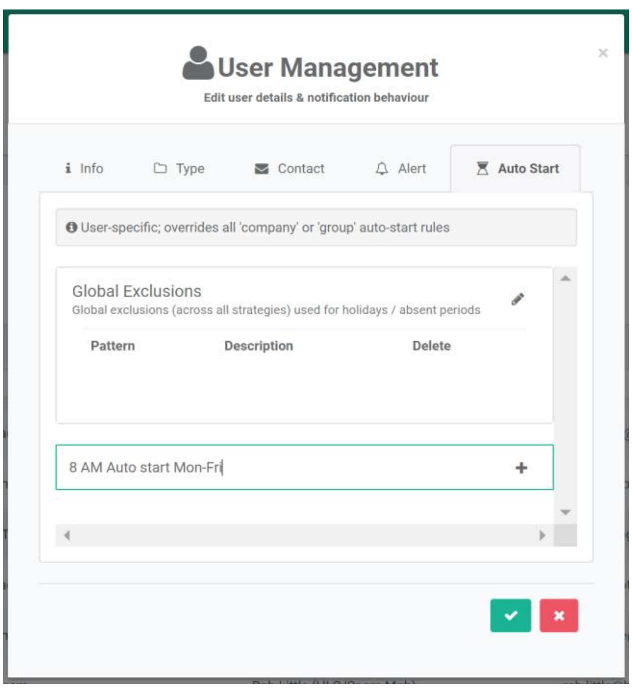


Next Click on the Contact tab: Enter the User's email address. This is used to send notifications to them. Enter the User's mobile number in Primary SMS box. This is used for sending SMS alert messages to them. (The Secondary contact details are not often used unless the User has additional devices.)

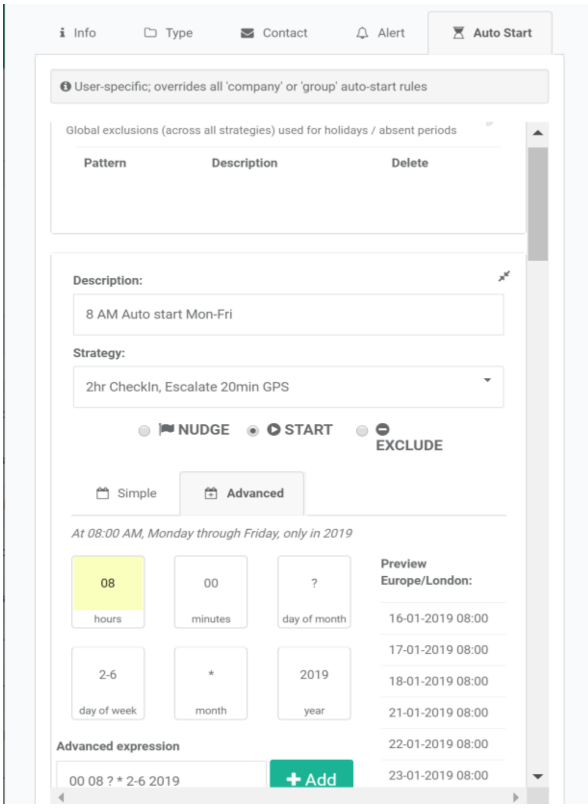


Next Click on the Alert tab:
Choose a Default Strategy from the drop-down menu. This is how often you want the User to check in.
Choose a Default Supervisor for the User from the drop-down menu. If you choose None/Inherited this will pick the default Supervisor from the Group, the User is attached to.

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.

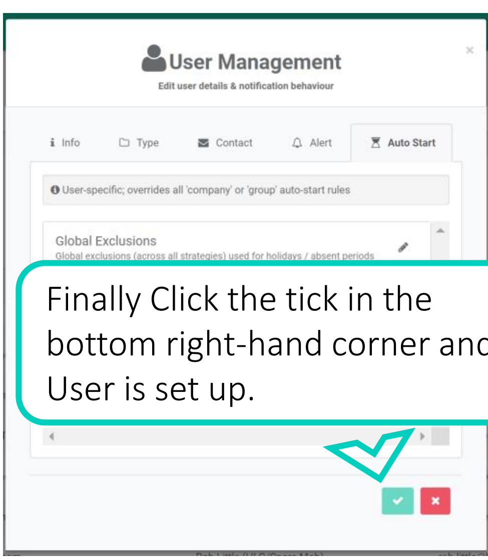


Click on the Auto Start tab if you would like to set up automatic starting of the app for the User. This is useful if they are forgetful or they do consistent shifts.
Enter a description in the green box – in this example the session will start automatically every day (Mon to Fri) at 8AM.
Then click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



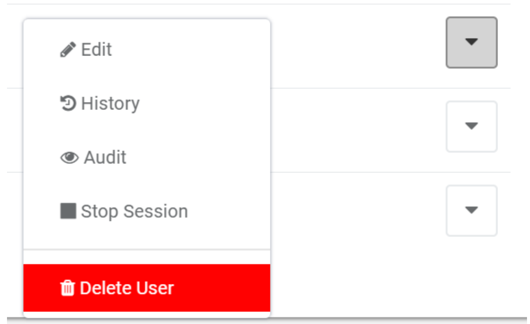
Click on the START dial and then the Advanced tab.
Enter the time you want to start in Hours and Minutes. Leave day of Month with ?. In Day of week add day numbers (Sunday is day 1 so 2-6 is Mon to Fri). Leave Month with * and enter Year in Year box.
The details you have created will appear above these 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.

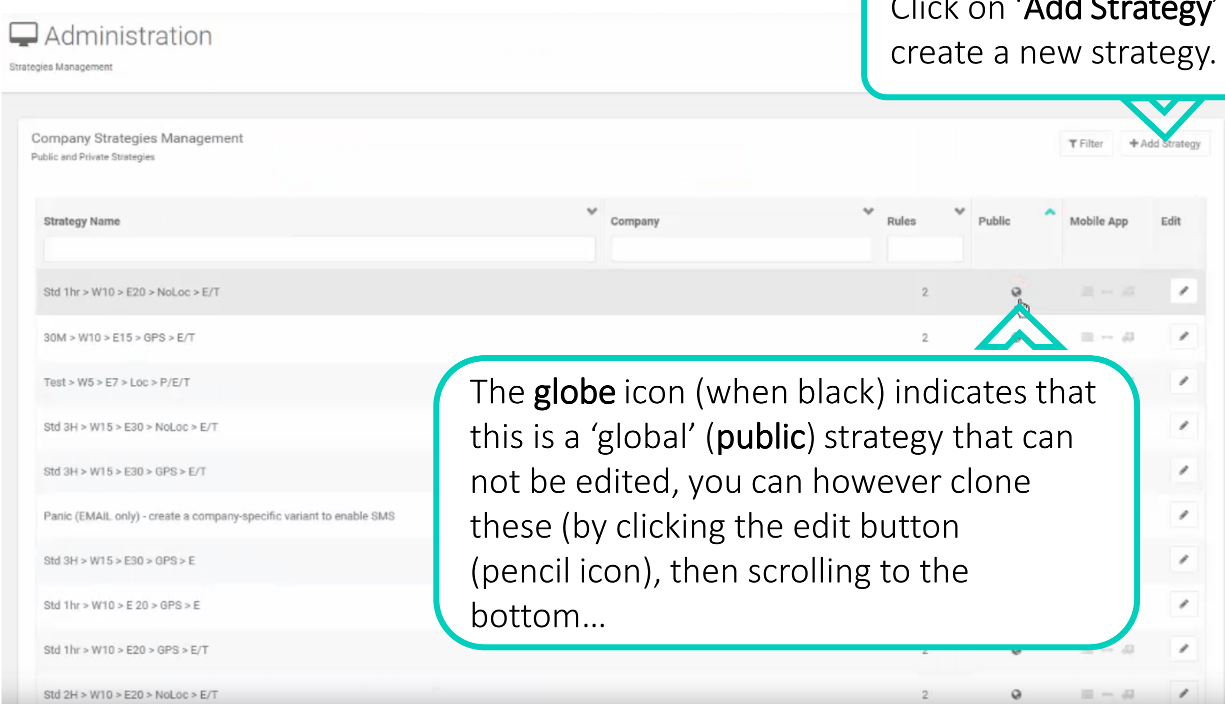
You can delete a User by clicking on the drop-down menu next to their name on the Dashboard and choosing Delete User.



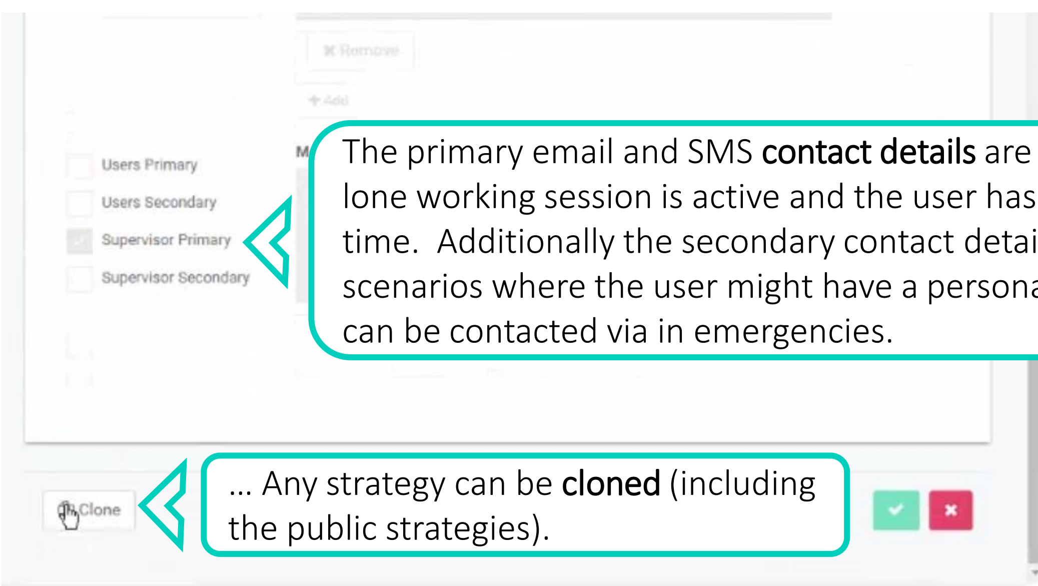
Creating a Strategy

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.

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…



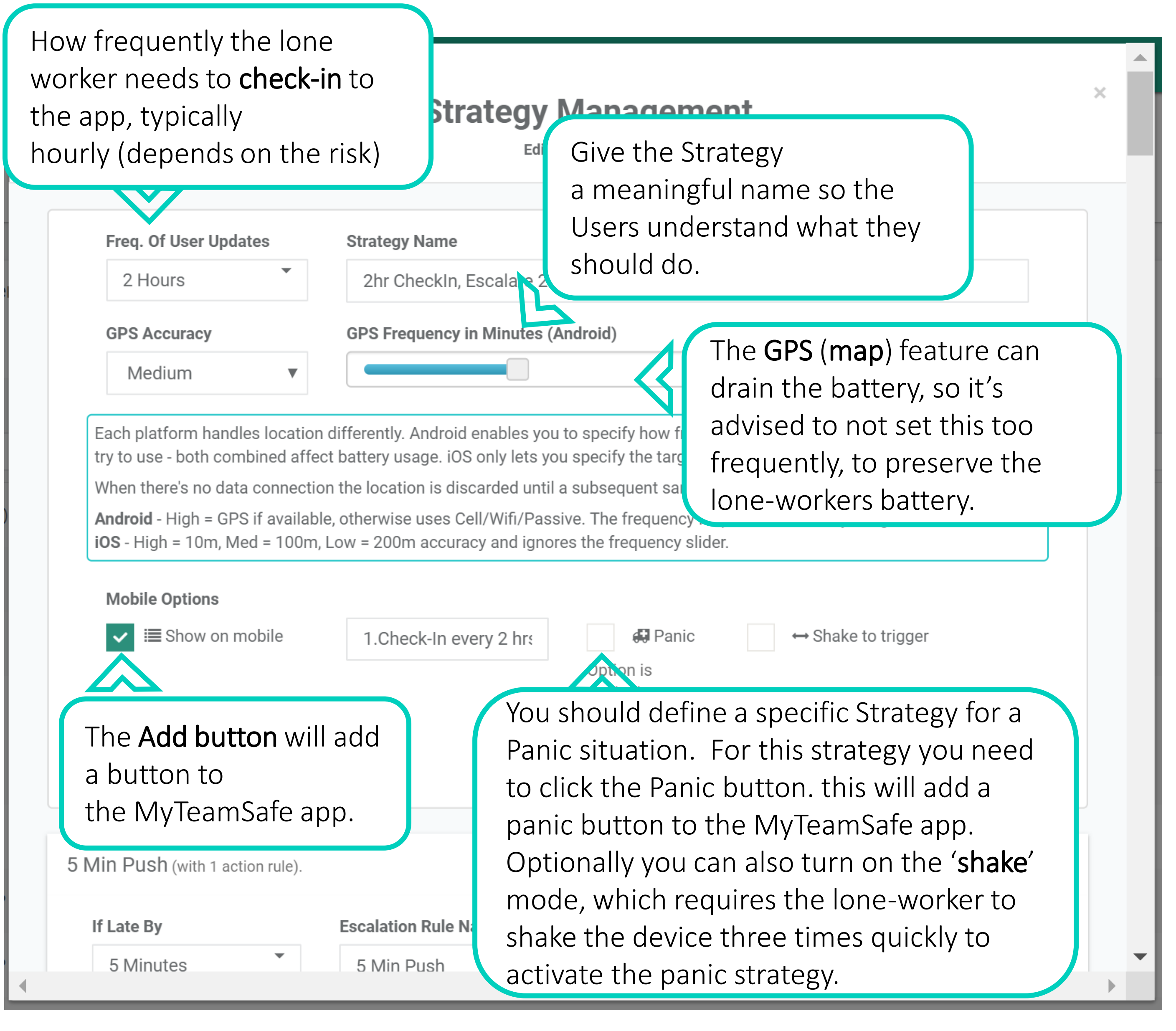
The primary email and SMS **contact details** are used when a lone working session is active and the user has not checked-in on time. Additionally the secondary contact details are useful for scenarios where the user might have a personal device that they can be contacted via in emergencies.

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

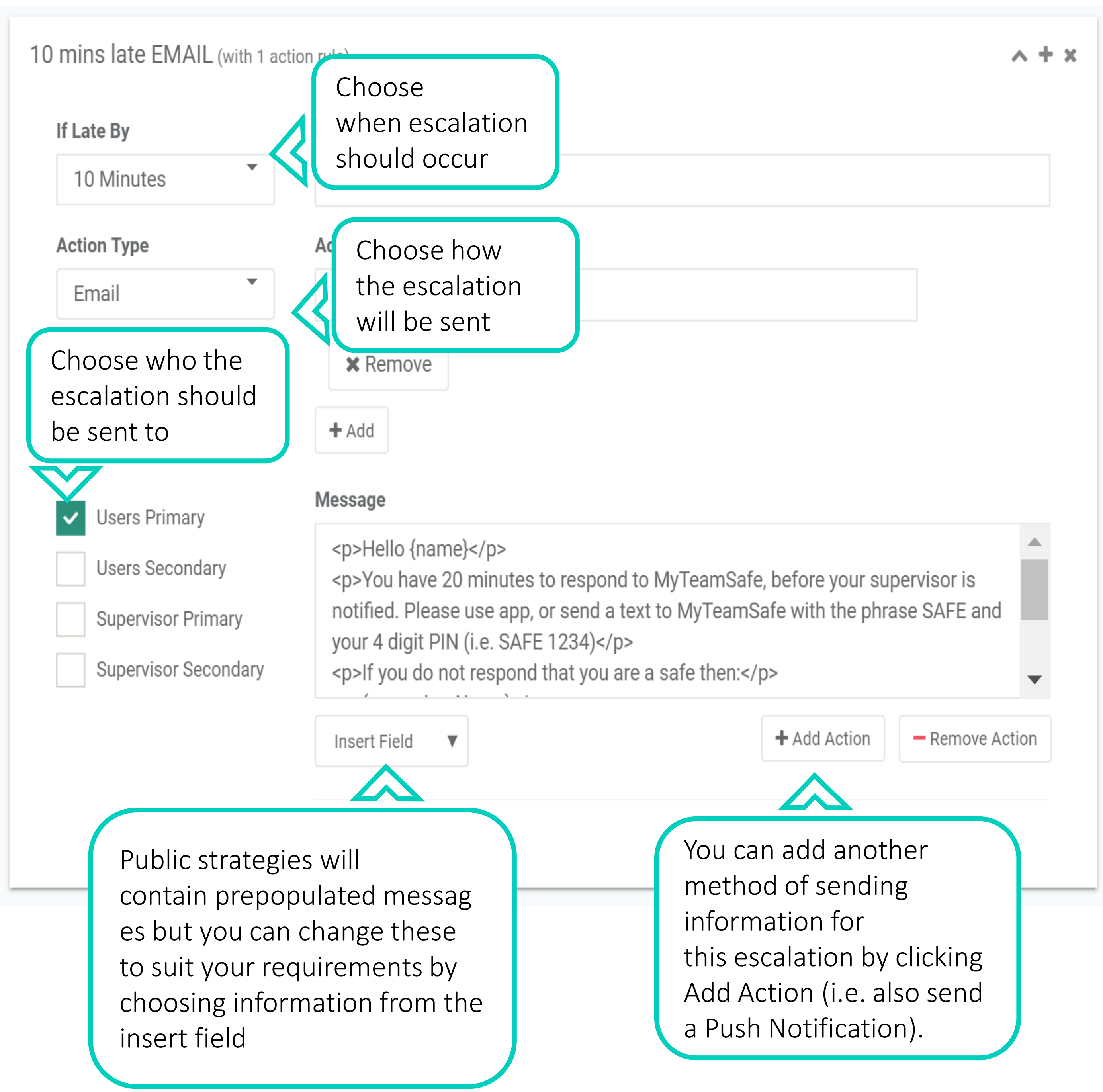
Strategies

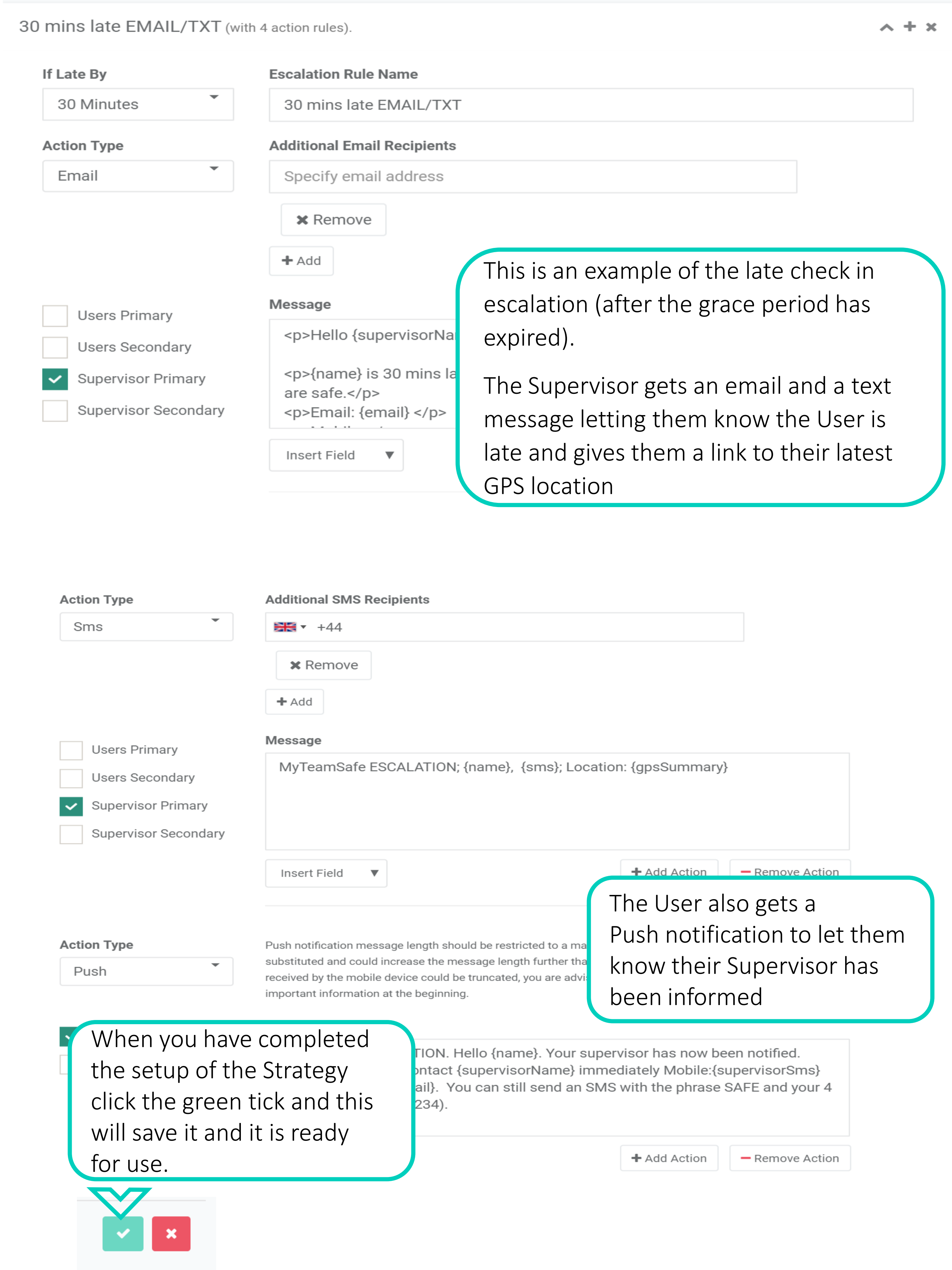
Default strategies can be assigned to a user, group and/or company. These are inherited, for example if you assigned a custom 'Warehouse strategy' to a group, then all users in that group will inherit that strategy – unless the user has a specific strategy that overrides it.

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.



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.

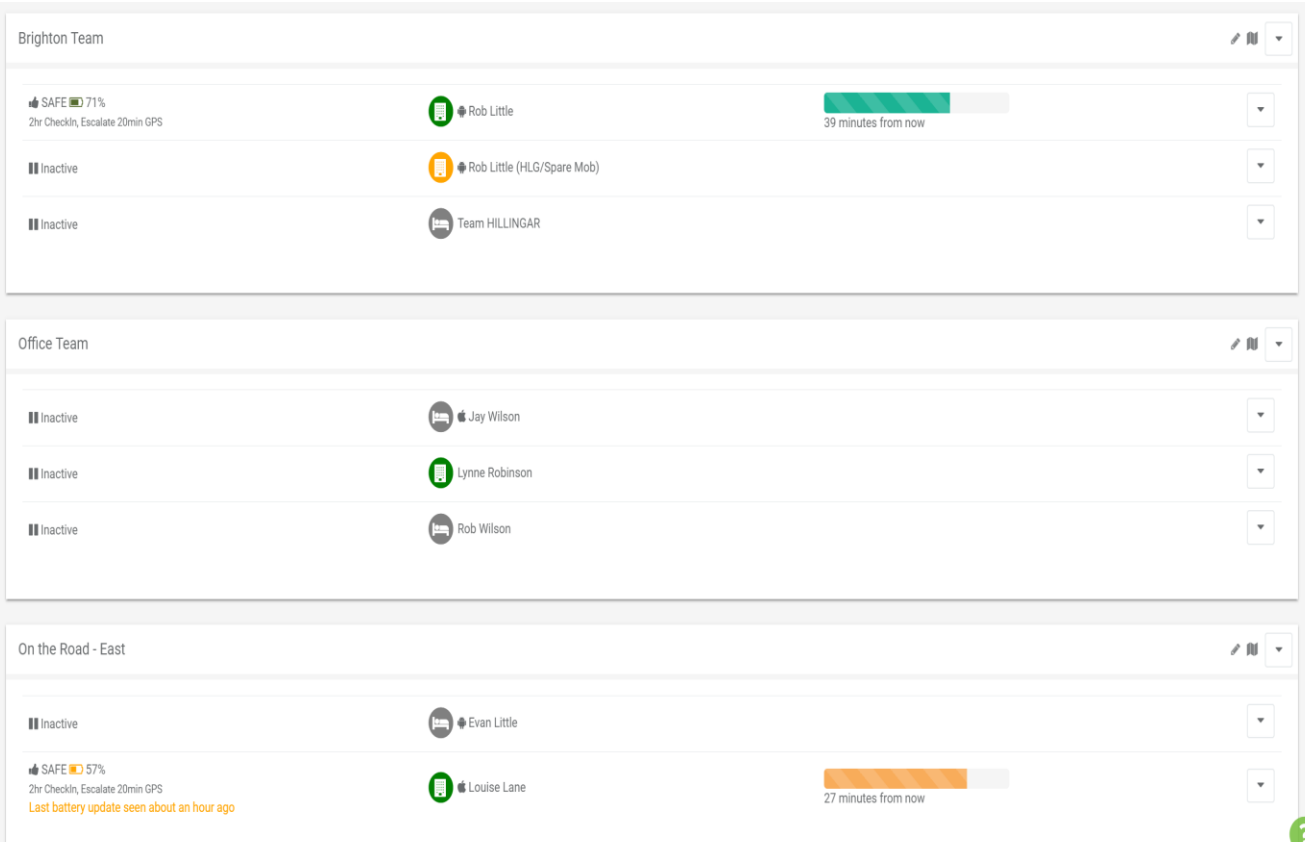


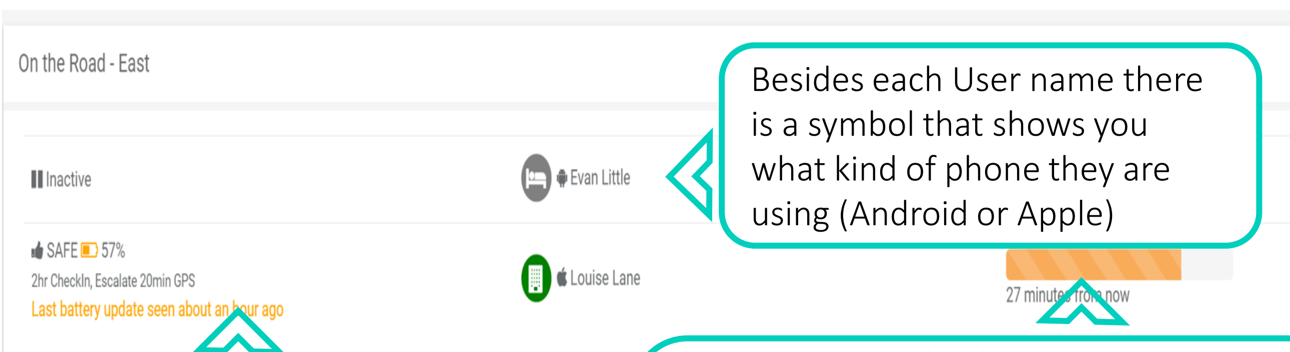


30 mins late EMAIL/TXT (with 4 action rules).
If Late By
30 Minutes
Escalation Rule Name
30 mins late EMAIL/TXT
Action Type
Email
Additional Email Recipients
Specify email address
Remove
Add
Users Primary
Users Secondary
Supervisor Primary
Supervisor Secondary
Message
<p>Hello {supervisorNa
<p>{name} is 30 mins la
are safe.</p>
<p>Email: {email} </p>
Insert Field
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
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
The User also gets a Push notification to let them know their Supervisor has been informed
Action Type
Push
Push notification message length should be restricted to a ma
substituted and could increase the message length further tha
received by the mobile device could be truncated, you are advi
important information at the beginning.
When you have completed the setup of the Strategy click the green tick and this will save it and it is ready for use.
TION. Hello {name}. Your supervisor has now been notified.
ontact {supervisorName} immediately Mobile:{supervisorSms}
ail}. You can still send an SMS with the phrase SAFE and your 4
234).
Add Action
Remove Action

Lone Working Dashboard

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





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)

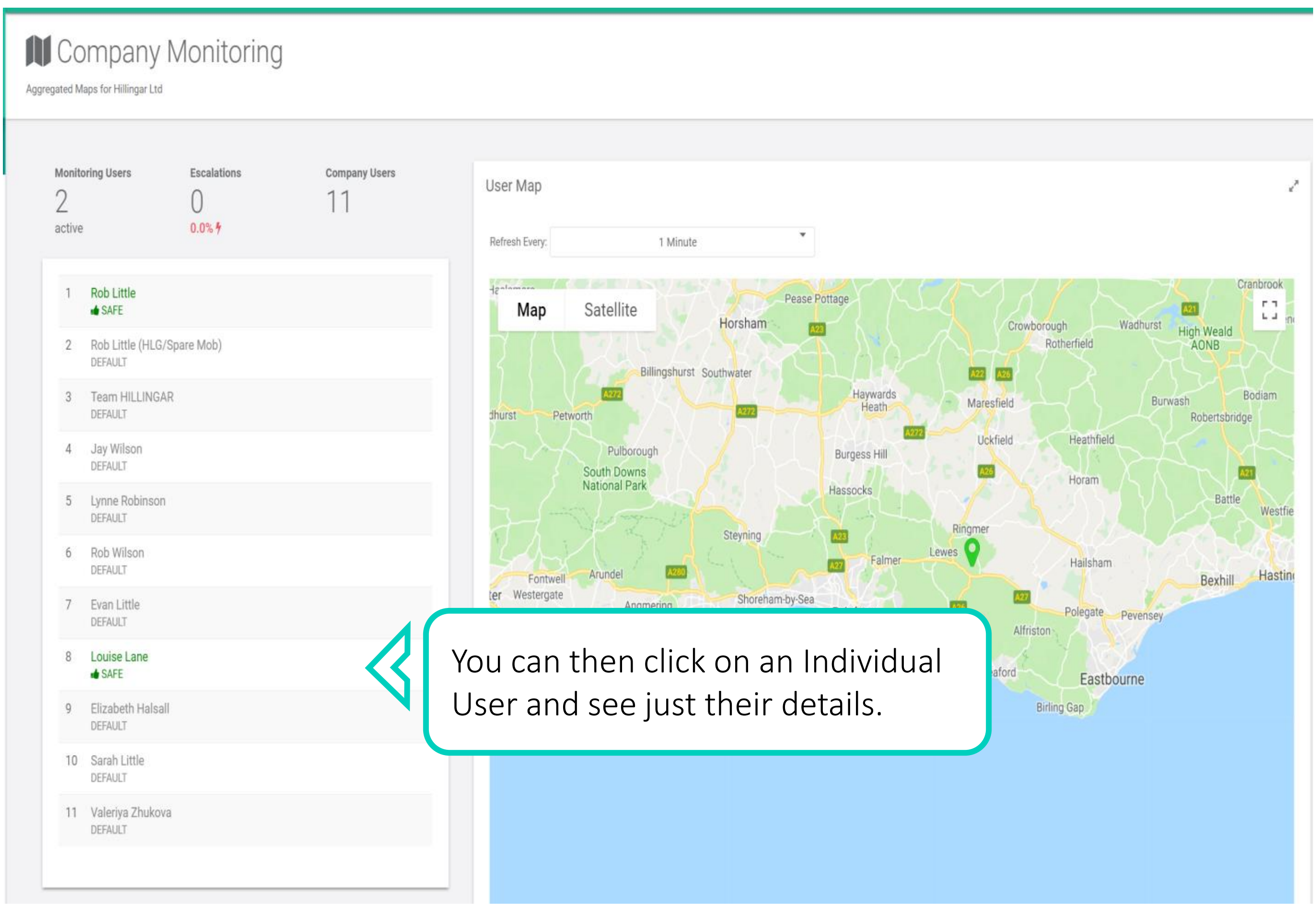
These symbols represent where the User is (if you wish to use the Fire Roster). Green = On site, Amber = Off site and Grey = Absent

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

Lone Working Dashboard

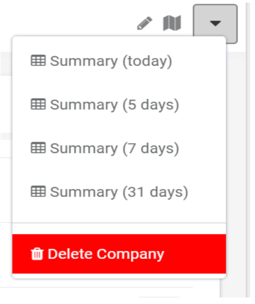
If you click on the flag Icon next to your Company Name , a map (like below) will appear showing all Users, their status and where they are on the map. You may need to zoom out to pick up all users if they are scattered over a large area.

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



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.

MyTeamSafe
Keeping lone working staff and your business safe
www.myteamsafe.com safe@myteamsafe.com

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
team@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 session count is colour coded to represent the **highest** escalation on the day

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

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

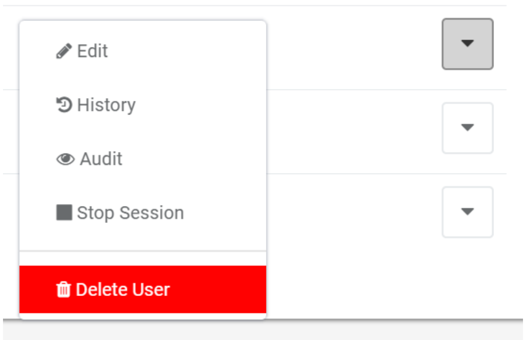
User in Brighton Team	12	13	14	15	16
team@hillingar.com					
rob.little@hillingar.com					
rob.little@myteamsafe.com	2	1	2	4	2

User in Office Team	12	13	14	15	16
louise.lane@hillingar.com					
jamie.wilson@myteamsafe.com				1	
yelldemo					

User in On the Road - East	12	13	14	15	16
evanlittlex@gmail.com					
lou.35@hotmail.co.uk			1	1	1

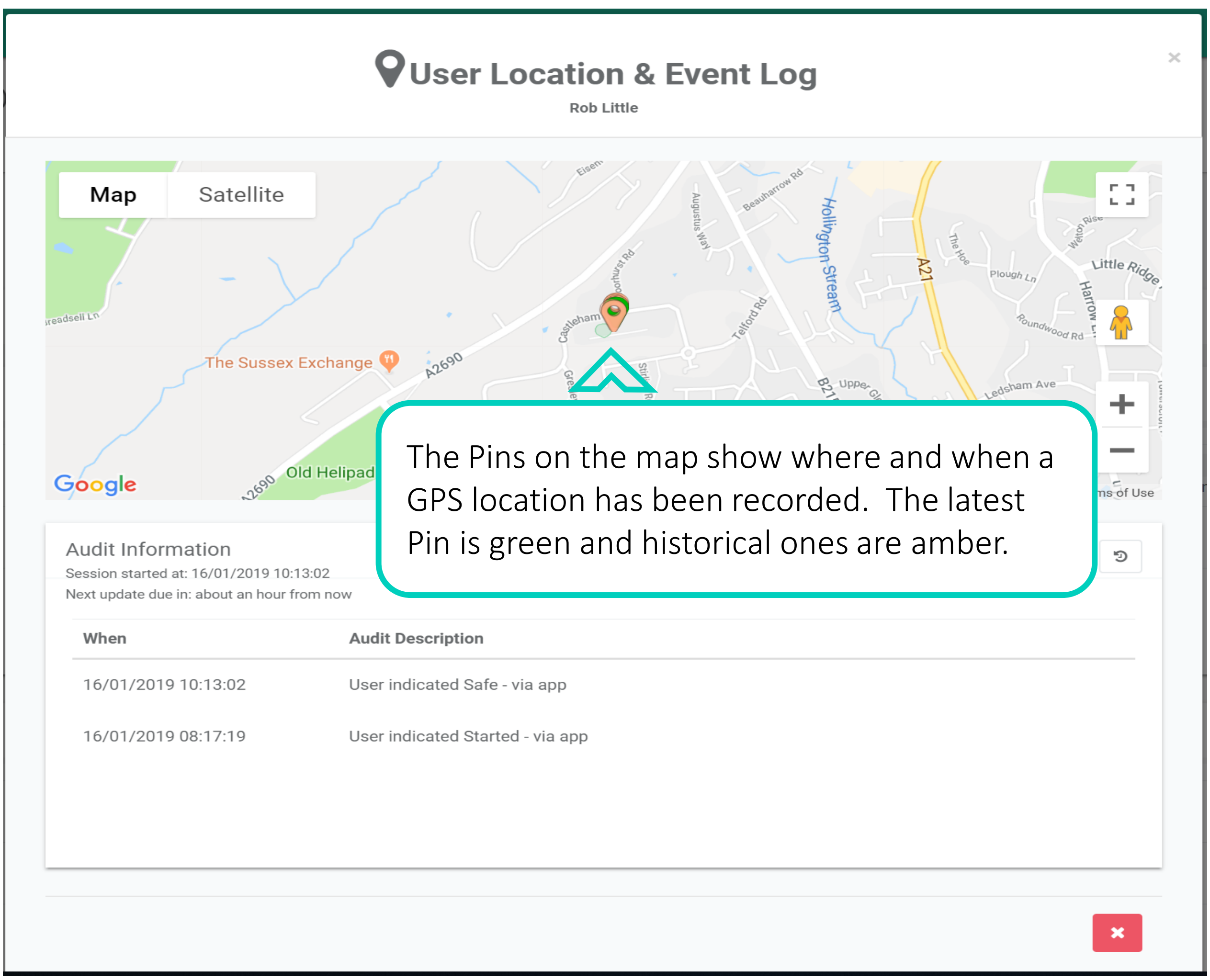
User in Technical Team	12	13	14	15	16
valeriya@myteamsafe.com					
slittle1968@gmail.com					
little44al@gmail.com					

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



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

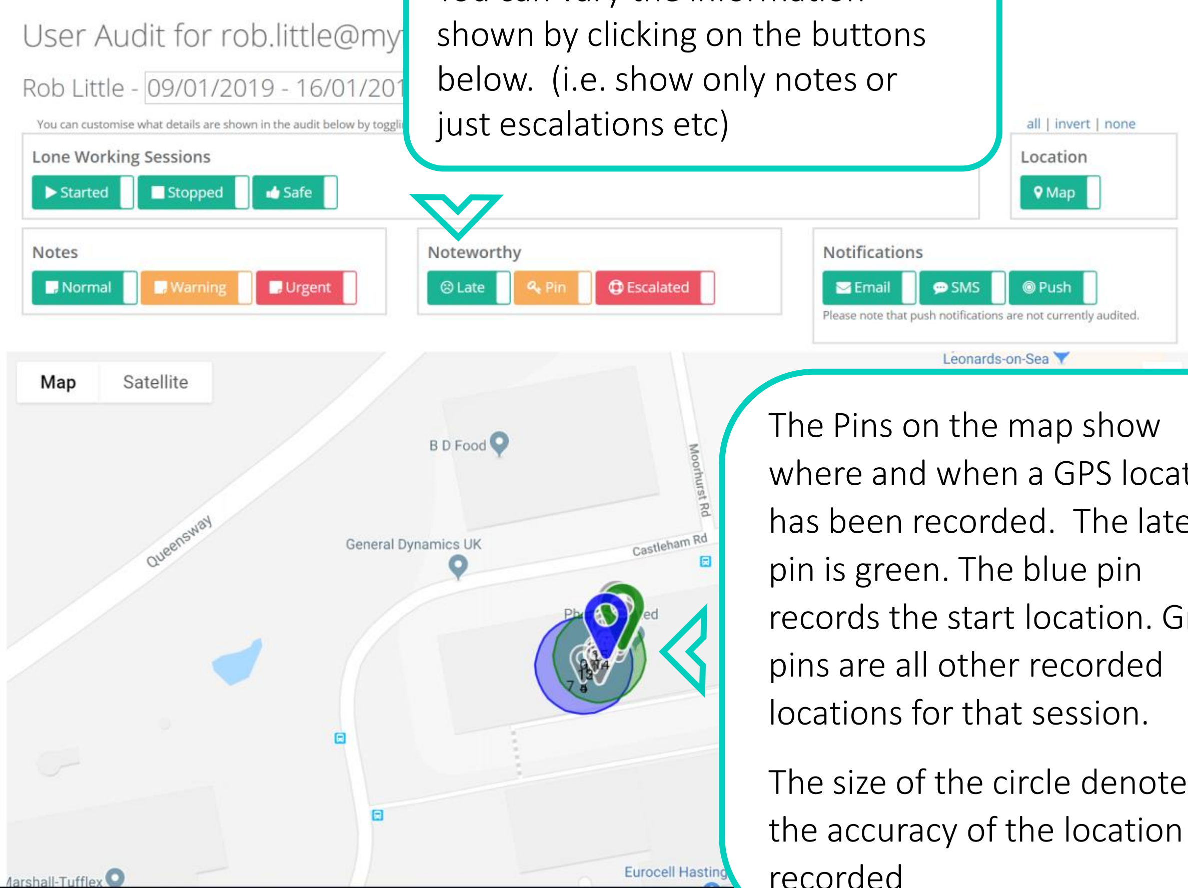
This **eye** symbol allows you to view the recent GPS locations for a User for either the current active session, or their last session. Included in the report is a table showing what escalations have occurred.



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.

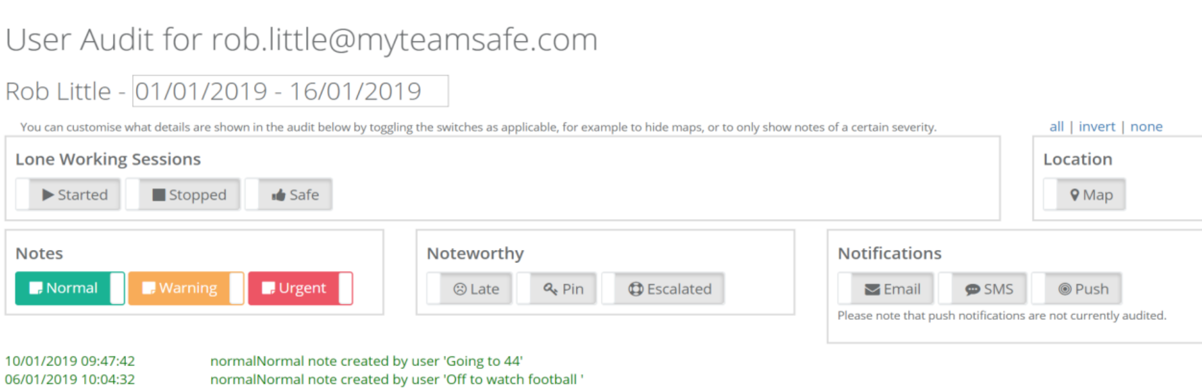
This Icon shows you the history of a User

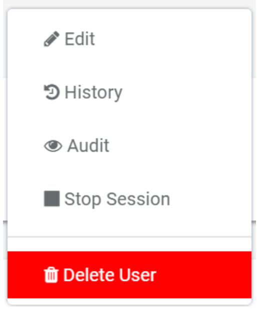
You can vary the information shown by clicking on the buttons below. (i.e. show only notes or just escalations etc)



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.

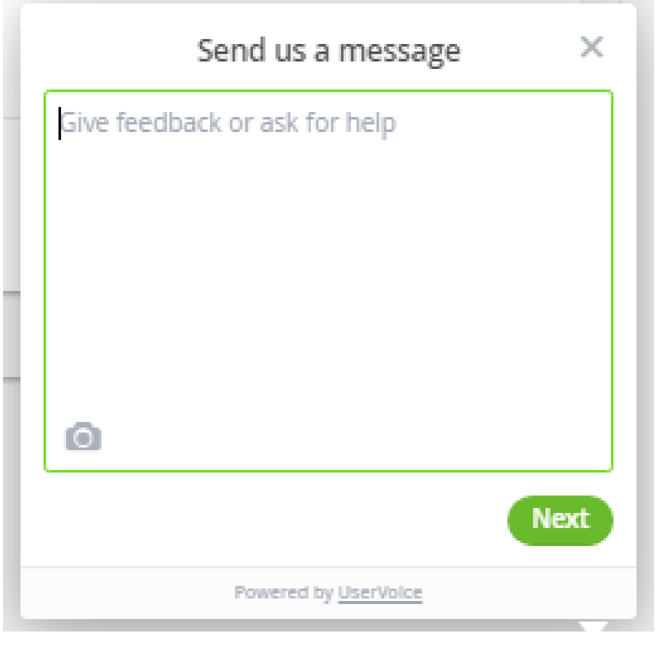
The size of the circle denotes the accuracy of the location recorded





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.



Bulk User Upload

You can add several new lone workers at the same time using a table.

1) Log in to the Dashboard. On the left Menu bar click on “Add Users”.

2) To add a new user, fill in the main contact detail boxes;

- Email address
- First name
- Last name
- Choose which Group/team they are in
- User’s main/primary mobile number

By default, users will be automatically given the Group settings for Strategy and Supervisor. They will be given no Admin permissions only lone working permission.

You can override these defaults by click on “advanced”.

A red box means the information is mandatory or that it is currently not valid.

You cannot have duplicate users with the same email log-in. If a user’s email has previously been created, you will be warned when you try to create the users.

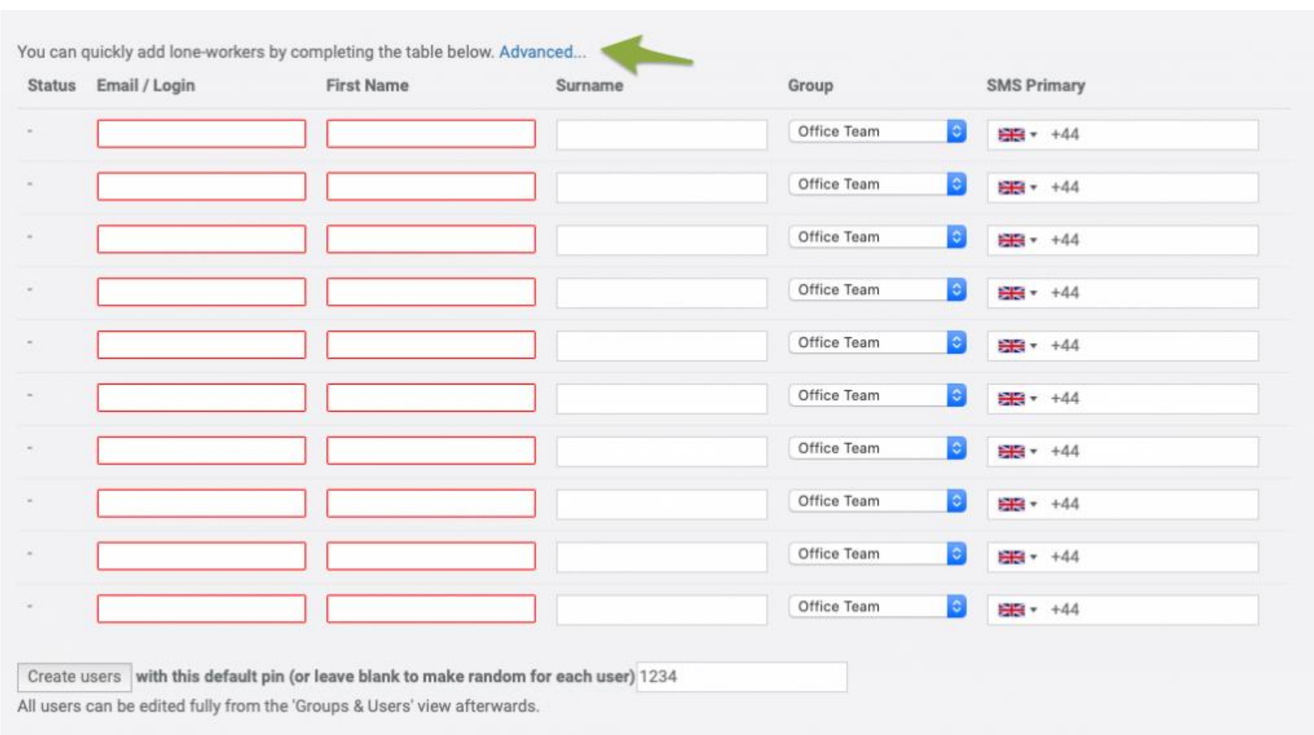
3) Always re-check all the new user details are correct.

4) At the bottom of the screen you can chose a default PIN number (used to check-in on the app) for all the users being created or delete the PIN and leave it blank so each user will be given a different random PIN.

Once you are happy that everything is correct click on the "Create Users" button.

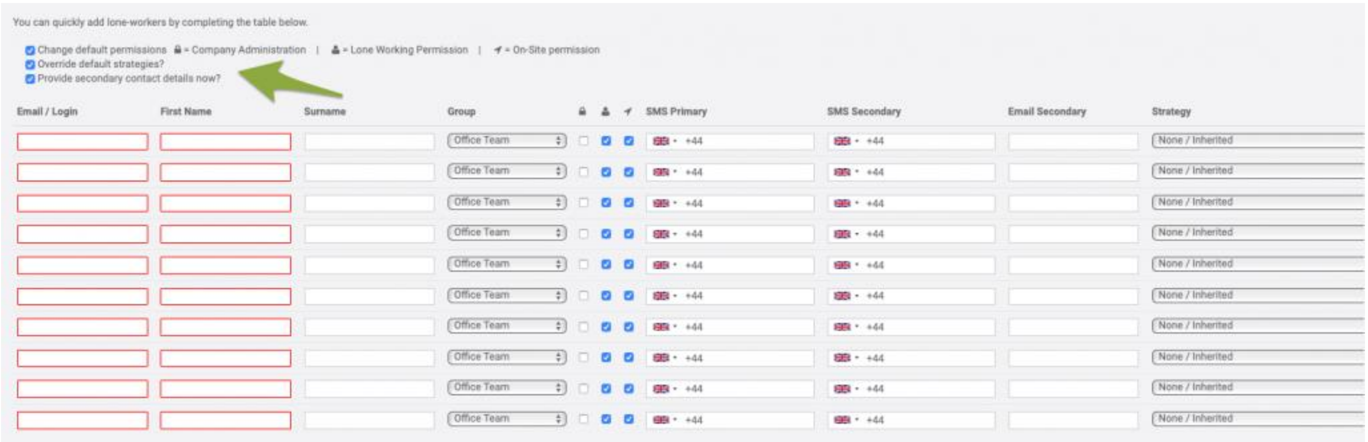
5) An automated "Welcome" email will be sent to each user with basic instructions and how to download the app. They are also sent their log in, Password and PIN information.

6) You can update a user's settings at at any time by going to the "Groups and Users" section, clicking on the "Users" tab and clicking on the pencil / edit icon to the right of the user's name.



ADVANCED; Change default permissions

You only need to click on advanced if you want to override the default settings.



Company Administration – Gives the user employee company administration rights, the same as yourself.

Lone Working Permission – Without this critical permission the user will not be able to start lone working sessions.
Only un-tick this option if the user is NOT a Lone Worker. Only Users with Lone Working Permission ticked count towards your User count.
This feature is useful to if you want additional Admins, add additional users in the preparation of upgrading your subscription at a later date, or so you can just transfer the permission from one user to another manually.

On-Site permission – When this is enabled the user can get a full list of users and contact details and their current on-site, off-site or absent app status. Simply text the command ‘fire’, ‘list’ or ‘onsite’ to the MyTeamSafe SMS number.

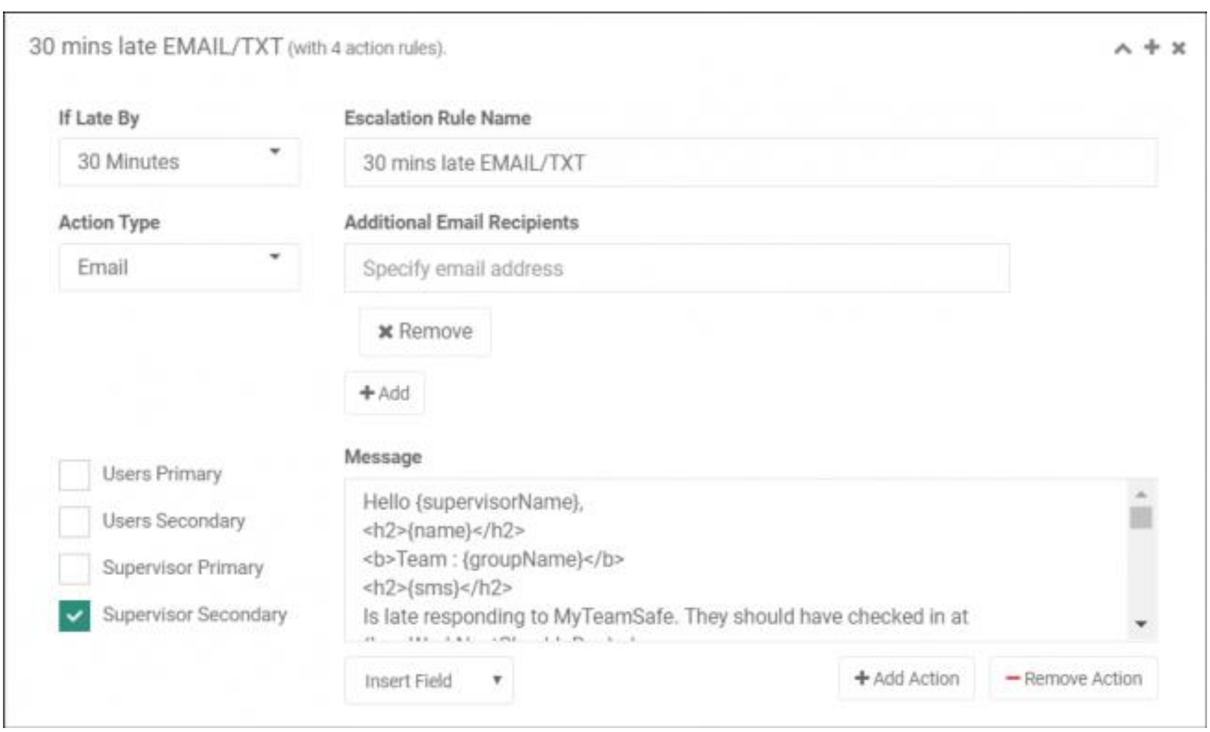
You will then be immediately emailed a full list of users and contact details.
If staff are required to use it consistently it’s a great feature for general emergency control purposes.

Access should be limited to only those that specifically need this level of information during an crisis.

Note: The On-Site/Off-Site/Absent is available to ALL users with a log-in. It is totally independent of lone working system and your user count.

Override Default Strategies – Instead of getting the default Group Strategy this allows you to set specific strategies (Lone working sessions) for each individual employee (User).

Secondary Contact Details – This allows you to set alternative contact information for each individual (user). This is optional. For example, it could be a person's personal phone or, if the user is a Supervisor, these alternative contact details could be their manager or even central 24/7 security team that can simply be utilized as part of an escalation step.
The graphic shows an Escalation step in a Strategy using secondary contact details.



If you still aren't keeping your staff and your organisation safe with MyTeamSafe why not find out more by watching our demo video https://content.myteamsafe.com/myteamsafe-demo-video/