

ISSUE MANAGEMENT & WORK ORDERS

USER GUIDE



A guard tour system

A LITTLE BIT ABOUT QR-PATROL

Q R-Patrol is an innovative guard tour monitoring system which helps security companies manage their guards and officers remotely in real-time and get full control over the guard tours accomplished in any location worldwide.

“ *Safety is a small investment
for a rich future.* **”**

Q R-Patrol guard tour system relieves officers from daily time consuming processes such as filling paper reports and making repetitive phone calls to the Monitoring Center that provoke confusion and misunderstandings.
The whole procedure is defined by strict guidelines and simple actions to take. Guards and officers can quickly send incidents reports, implement patrols and any other guard service by taking advantage of the last innovations in technology.

“ *Prepare and prevent
Don't repair and repent.* **”**

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What is Issue Management?

Issue Management (or in short, “IM”) is the process of handling Issues like Incidents and emergencies, from the moment they were reported until they are completely resolved.

The below types of events are considered “Issues” and can be handled through Issue Management:

- ✓ Incidents
- ✓ SOS/Mandown alerts
- ✓ Pending actions (i.e. missed scans that are pending some action)

What is a Work Order?

A Work Order (or in short, “WO”), is essentially a description of a work that needs to be conducted, that will usually result in an Issue being resolved.

A WO can be due in a certain date, and can also include information about the location of the work, indications of what tools need to be used or skills necessary and any more details the managers want to include for their records.

Where to find IM and WOs?

Issues can be handled through “**Resolution center**” menu, located in the web application, at the top menu bar.

There are 2 sub-menus there:

- 1 **Issue Management:** Here you can handle your issues from the moment they were reported until they are resolved. Issue Management page contains the following tabs:

- ✓ Issue Management tab

- ✓ Work Orders tab

For more information on each tab, please visit the relevant section in this guide.

- 2 **Incident Types:** In this page, you can add new Incident type or change your Incident type settings.

Incident Types is essentially a predefined list of Incidents that can possibly occur during a Guard's/Worker's shift. The Guard/Worker has the option to choose one of them to quickly report them.

**** NOTE**

Issue Management Tab

In this tab, you can view by default all of your Issues (Incidents, SOS/Mandown and Missed scans) for the last 7 days.

Change the date range

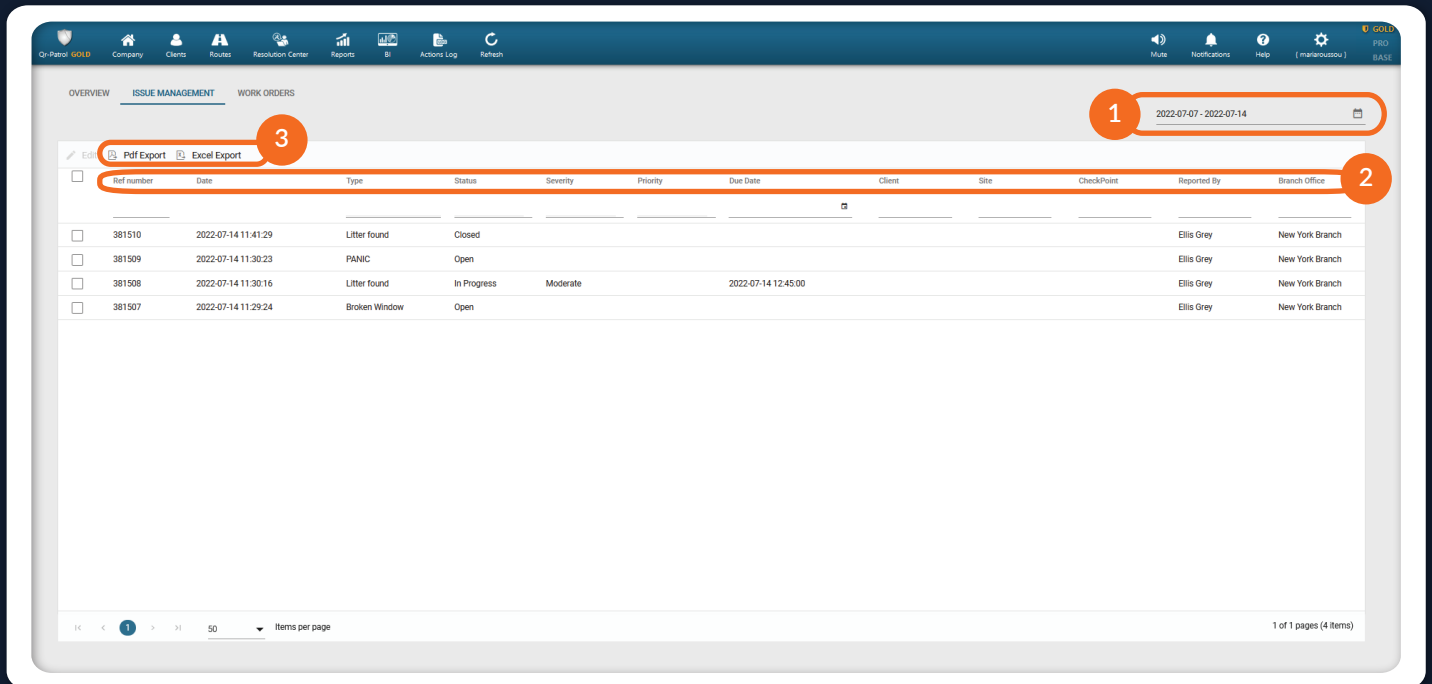
On the top right of the page, you can change the **date range**¹ by pressing on the calendar icon, selecting a “Start” and “End date” and pressing “Apply”.

View an overview of your Issues

On the **grid**², you can view the following information for each one of your Issues:

- ✓ **“Ref number”**: A system-generated, unique number for each Issue.
- ✓ **“Date”**: The Date the Issue occurred.
- ✓ **“Type”**: The Type of the Issue. An Issue can be an event Type like SOS, or a certain Incident Type (e.g. Fire, Broken Lock..).
- ✓ **“Status”**: The Status of the Issue.
- ✓ **“Severity”**: The Severity of the Issue.
- ✓ **“Priority”**: The Priority of the Issue.
- ✓ **“Due Date”**: The Due Date of the Issue.
- ✓ **“Client/Site/Checkpoint”**: The Client/Site/Checkpoint this Issue is related to (if any).
- ✓ **“Reported by”**: The name of the Guard/Worker that reported this Issue.
- ✓ **“Branch Office”**: The Branch this Issue belongs to.

You can **export your grid** in a PDF or Excel by pressing the respective buttons at the top of the page. The export will include all Issues available on your grid, based on the filters you have applied.



Issue Edit

You can **bulk edit Issues** by selecting them and pressing “Edit”. Any changes made on this window will be applied to all selected Issues after you click “Save”.

- ✓ If you change a setting when bulk editing Issues, this setting will be applied to all selected Issues.
- ✓ If you want to keep some settings intact while bulk editing, just leave those settings unchanged.
- ✓ If you want to reset all settings’ values for the selected Issues, press on the “Reset” button.

To edit a single Issue, select it from the grid, and press the “Edit” button at the top of the page, or double click on it.

Issue's Details Tab

In this tab, you can view and edit the Details of your Issue. Greyed-out fields are non-editable.

The screenshot displays the 'Issue: #381508' details page. It features a top navigation bar with icons for Company, Clients, Routes, Resolution Center, Reports, BI, Actions Log, and Refresh. The main content area is divided into sections: DETAILS, MIMES, and ASSIGNED WORK ORDERS. The DETAILS section includes fields for Ref Number (381508), Date (2022-07-14 11:30:16), Submitted Date (2022-07-14 11:30:16), Type (INCIDENT: Litter found), Status (Open), Severity (Moderate), Priority (Low), and Due Date (2022-07-14 12:45:00). The ASSIGNED WORK ORDERS section shows Client, Site, Checkpoint, Branch Office (New York Branch), Reported By (Ellis Grey), and Notes (Ellis informed me that she picked up the litter but there is a spillage on the floor and might cause an accident). The right sidebar contains a 'Link Issues' section and a 'Timeline' section with a list of events. Numbered callouts 1 through 6 highlight the Status/Severity/Priority dropdowns, the Due Date field, the Notes field, the Link Issues section, the Timeline section, and the 'CREATE WO' button respectively.

1 Status/Severity/Priority

To change the "Status"/"Severity"/"Priority", click on the dropdown menu and select the one that meets your needs.

The available Statuses are the following: Open, In Progress, Ignored or Closed. All Issues by default are set to "Open".

If a WO is created for an Issue, then its Status will be automatically changed to "In Progress" by the system!

**** NOTE**

The available Severities are the following: Critical, Major, Moderate, Low.

Incidents carry the Severity of the Incident Type (as set by the managers under Resolution Center>>Incident Types. Refer to Web app user guide under Section "Incidents" for more information).

**** NOTE**

The available Priorities are the following: High, Medium, Low.

To reset the Severity/Priority, select the blank option on the dropdown menu.

2

Due Date

To change the “Due Date”, click on the calendar icon and select the Due Date of your preference. You can also edit the date & time manually, by clicking on the field and writing down your date & time of preference.

3

Notes

Press on the “Notes” field to add internal notes for this Issue (e.g. Root cause, additional information etc.). These notes are only visible within the web application, between managers.

4

Link Issues

If more than one Issues are related, you can link them together to show their relation.

To link one or more other Issues with your Issue, press on the “Link Issues” field and select the one(s) you want to link from the dropdown menu. If you are unsure which one of the dropdown options is the Issue you want to make a linkage with, check its Ref number.

Issues linked together appear under “Linked Issues” and you can quickly navigate to one of them by clicking on it.

5

Timeline

Under “Timeline”, you can view detailed historical logs for any changes made for this Issue, such as Status changes, Notes and Linkages, as well as WOs created for this Issue. All logs include the date and time a change took place, as well as who made it.

6

Create WO through an Issue

Press “Create WO” to create a new Work Order that will be assigned to this Issue. For information on how to create a WO, refer to “WOs Details Tab” section.

Press “Save” to save your changes, or “Cancel” to close the Issue window without saving.

Issue's MMEs Tab

In this tab, you can view all available multimedia related to your Issue.

This Tab is only available for Issues with type "Incident".

**** NOTE**

Under "**Multimedia**", you can view all of the multimedia captured for this Issue in thumbnails (i.e. photos, video, sound recording, signature). By clicking on a thumbnail, you can view your multimedia in a bigger scale under "**Preview**". If there is a description available, you can view it under "**Description**".

Issue's Assigned Work Orders Tab

In this tab, you can view and edit any Work Orders related to this Issue.

On "**Work Orders**" panel, you can view all the WOs assigned to his Issue. Select one to view its details.

For information on how to **edit a WO**, refer to "WOs Details Tab" section

Work Orders Tab

In this tab, you can view all of your Work Orders **for the last 7 days** by default.

Change the date range

On the top right of the page, you can change the **date range**¹ by pressing on the calendar icon, selecting a “Start” and “End date” and pressing “Apply”.

View an overview of your Issues

On the **grid**², you can view the following information for each one of your Work Orders:

- ✓ **“Needs attention”***: An indication of whether this WO needs attention by the manager.
- ✓ **“Ref number”**: A system-generated, unique number for each WO.
- ✓ **“Date”**: The Date the WO was created.
- ✓ **“Name”**: The Name of the WO.
- ✓ **“Status”**: The Status of the WO.
- ✓ **“Priority”**: The Priority of the WO.
- ✓ **“Tag”**: The current condition of the WO.
- ✓ **“Assignees”**: The people assigned to this WO in order to complete the work required.
- ✓ **“Due Date”**: The Due Date of the WO.
- ✓ **“Client/Site”**: The Client/Site this WO is related to (if any).
- ✓ **“Branch Office”**: The Branch this WO belongs to.

You can **export your grid** a PDF or Excel by pressing the respective buttons at the top of the page. The export will include all Work Orders available on your grid, based on the filters you have applied.

* Needs attention

“Needs attention” gives an indication to the manager that there might be something wrong with a WO.

A WO can be marked as needing attention if the Operational Need cannot be covered, in case it was “Rejected” or “Aborted” by the Assignees.

WOs marked with “Yes”, indicate that they need attention.

Needs Attention	Ref number	Date	Name	Status	Priority	Tag	Assignees	Due Date	Client	Site	Branch Office
Yes	201	2022-07-14 11:50:40	Please check t...	Open		Aborted					New York Branch
No	200	2022-07-14 11:48:52	Check the peri...	Open	Medium	Assigned	Michael Scott				New York Branch
No	199	2022-07-14 11:38:28	Spillage and lit...	In Progress	Low	Working	Michael Scott	2022-07-14 12:30:00			New York Branch

WO Edit

To edit a WO, select it from the grid, and press the “Edit” button at the top of the page, or double click on it.

WOs Details Tab

In this tab, you can view and edit the Details of your WO. Greyed-out fields are non-editable.

The screenshot displays the 'Work Order: #199' details page. The form includes fields for Name, Date, Linked Issue, Assignees, Operational Need, Time-frame for auto WO reject, Location, Branch, Client, Site, Status, Tag, Priority, and Due Date. There are also text areas for Notes and Instructions, and a Timeline panel on the right showing a history of actions. Numbered callouts 1 through 11 point to these specific elements.

1 Name

To change the "Name" of the WO, click on the field and add your preferred name.

2 Status/Priority

To change the "Status"/"Priority", click on the dropdown menu and select the one that meets your needs. To reset the Priority, select the blank option on the dropdown menu.

The available Statuses are the following: Open, In Progress, Cancelled or Closed. "Closed" WOs can be reopened by changing the Status to "Open". In this case, any tags will be removed, and the system will also remove any Assignees that have Rejected or Aborted this WO, but you can reselect them if you want to reassign them to it. You can re-send it to Assignees by pressing "Save".

If a WO is Accepted by at least 1 Assignee, then its status will automatically change to "In Progress" by the system!

**** NOTE**

If a WO is Aborted by all Assignees, then its Status will automatically change to "Open", to indicate that an action is needed by the manager.

**** NOTE**

3

Tag

Tags are automatically set by the system in order to indicate the WO's latest state; because of that, they are non-editable by managers.

The available tags are the following:

- **Unassigned:** This WO is not assigned to any Assignees
- **Assigned:** This WO is assigned to at least 1 Assignee
- **Rejected:** This WO is Rejected by all its Assignees
- **Working:** At least 1 Assignee has declared that they have started "Working" on this WO
- **Completed *:** At least 1 Assignee has declared that they have "Completed" this WO
- **Aborted:** This WO is Aborted by all its Assignees, or it has been both Rejected and Aborted by all Assignees

** WOs marked as "Completed" by the Assignees, can be Reopened by managers by pressing on the "Reopen" button. In this case, any tags will be removed, and the system will also remove any Assignees that have Rejected or Aborted this WO, but you can reselect them if you want to reassign them to it. You can re-send it to Assignees by pressing "Save".*

4

Due Date

To change the "Due Date", click on the calendar icon and select the Due Date of your preference. You can also edit the date & time manually, by clicking on the field and writing down your date & time of preference.

5

Assignees

Assignees are the people that will receive this WO and will be able to Accept or Reject it. Assignees that accept the WO, can complete the work assigned through this WO.

To add Assignees to your WO, press on the field and select one, more, or a Group of them from the dropdown menu.

Saved WOs that include Assignees are published and considered In Progress. This means that the Assignees will be able to view the WO and its details and they can start Working!

**** NOTE**

6

Operational Need

To define the "Operational Need", press on the up or down arrow depending on the number you want to set, or click on the field and type down your preferred choice.

"Operational Need" indicates the number of people that are actually needed in order to complete the work. This allows for flexibility in assignment: you can assign multiple people in the "Assignees" field if you are unsure of whom is available to complete it and the Operational Need will be covered when the set number is fulfilled. If the Operational Need is not covered for some reason, you will have a "Needs attention" indication on the grid. See more under section "Needs attention" in Work Orders Tab

For example, if 2 people are required in order for this work to be completed, you can set the “Operational Need” to 2. As you are unsure of whom is available at the moment in order to complete it, but you know that 6 people work today, you decide to add all 6 people in the “Assignees” in order for the ones available to accept it.

The first 2 people that will accept the WO (based on the number set for the “Operational Need”), will be the ones that the WO will actually be assigned to, in order to complete it.

7

Timeframe for auto WO reject

“Time frame for auto WO reject”, is used to define the date/time when a WO will be automatically rejected by the system if an assignee has not accepted it until then. This is useful in order for the manager to quickly take action if it is not accepted by the preferred time.

To define the “Time frame for auto WO reject”, click on the calendar icon and select the date of your preference. You can also edit the date & time manually, by clicking on the field and writing down your date & time of preference.

8

Location

WOs by default carry the linked Issue’s location (if any) – i.e., the Guard/Worker’s location the time they reported the Issue.

To view the location of where a WO should be conducted from, click on the location pin under “Location”.

To change the location, enable “Custom location” checkbox and click anywhere on the map.

The Assignees of this WO will be able to see the location they should go to on the map in their mobile application.

9

Notes

Press on the “Notes” field to add internal notes for this WO (additional information, internal guidelines etc.). These notes are only visible within the web application, between managers.

10

Instructions

Instructions can be used to help your Assignees understand what they need to do in order to complete the work required for this WO.

To add “Instructions” to your WO, click on the “Instructions” field and type the instructions.

Use our editor to add simple format like bold text and bullet points, to have more structured and easier to follow instructions for your Assignees.

Timeline

Under “Timeline”, you can view detailed historical logs for any changes made for this WO, such as Status changes and Notes, as well as responses by Assignees. All logs include the date and time a change took place, as well as who made it.

Press “Save” to save your changes, or “Cancel” to close the WO window without saving.

WO's MMEs Tab

In this tab, you can view all available multimedia related to your WO. Assignees can report multimedia multiple times during a WO, such as when detecting something out of the ordinary, or when they want to prove they finished the work.

In the “**MMEs**” column, you can view all MME entries made for this particular WO, along with the date/time they were reported by the Assignees. Select the one you are interested in.

In the “**Multimedia**” column, you can view all of the multimedia captured for the selected MME entry in thumbnails (i.e. photos, video, sound recording, signature). By clicking on a thumbnail, you can view your multimedia in a bigger scale under “**Preview**”. If there is a description available, you can view it under “**Description**”.

Mobile Application

The people assigned to a Work Order ("Assignees") can view and respond to it from their Mobile App's "Timeline" menu, located at the top right of the screen, by tapping on the calendar icon.

"Timeline" contains 2 tabs: "Pending tasks" and "History".

Pending Tasks

In this tab, you can view all WOs that are assigned to you and are "Open" or "In Progress".

You can view the WO's name, how long you have to respond to it, and its Priority.

WOs are marked in different colors depending on their state:

- ✓

White

WOs Pending a response
(Accept or Reject)
- ✓

Orange

WOs In Progress
- ✓

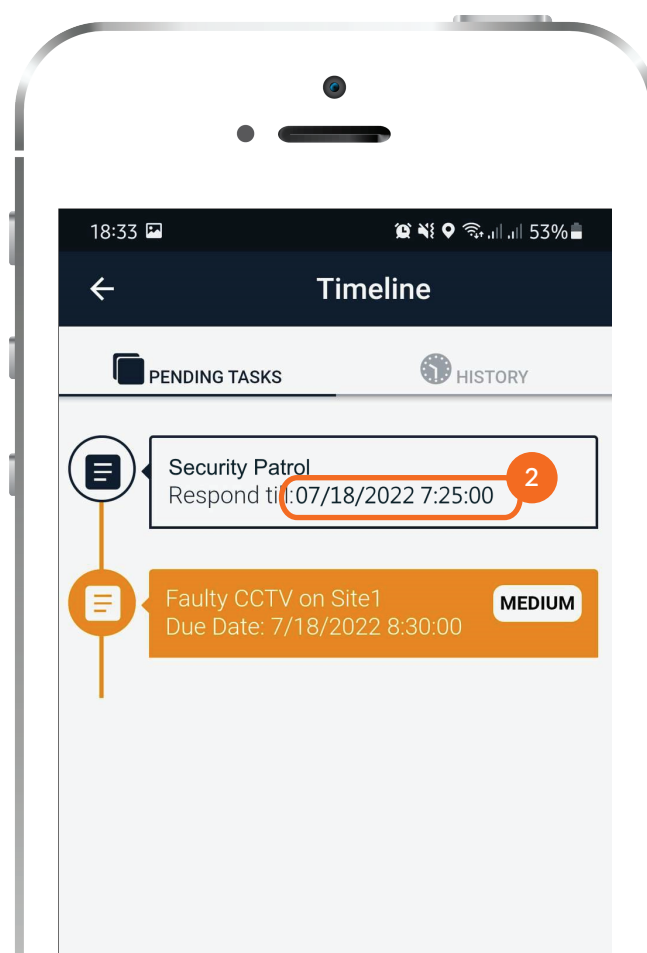
Green

Completed WOs
(Visible on History tab)
- ✓

Red

Aborted/Rejected WOs
(Visible on History tab)

Press on a WO to view more details and respond to it.



WO Details

In the WO's details you can view all information related to this WO in order to decide whether you want to accept it or not.

1 Map

Press on the Map icon at the top right to see where you need to go in order to complete this WO. To hide the Map, simply press on the map icon again.

2 Time to respond

The date/time until you need to respond to this WO, before it is automatically rejected by the system.

3 Due Date

The date/time until you need to complete this WO if accepted.

4 Current Step

The step you are currently in for this WO based on your actions.

5 Status

The status of this WO, based on the manager's actions.

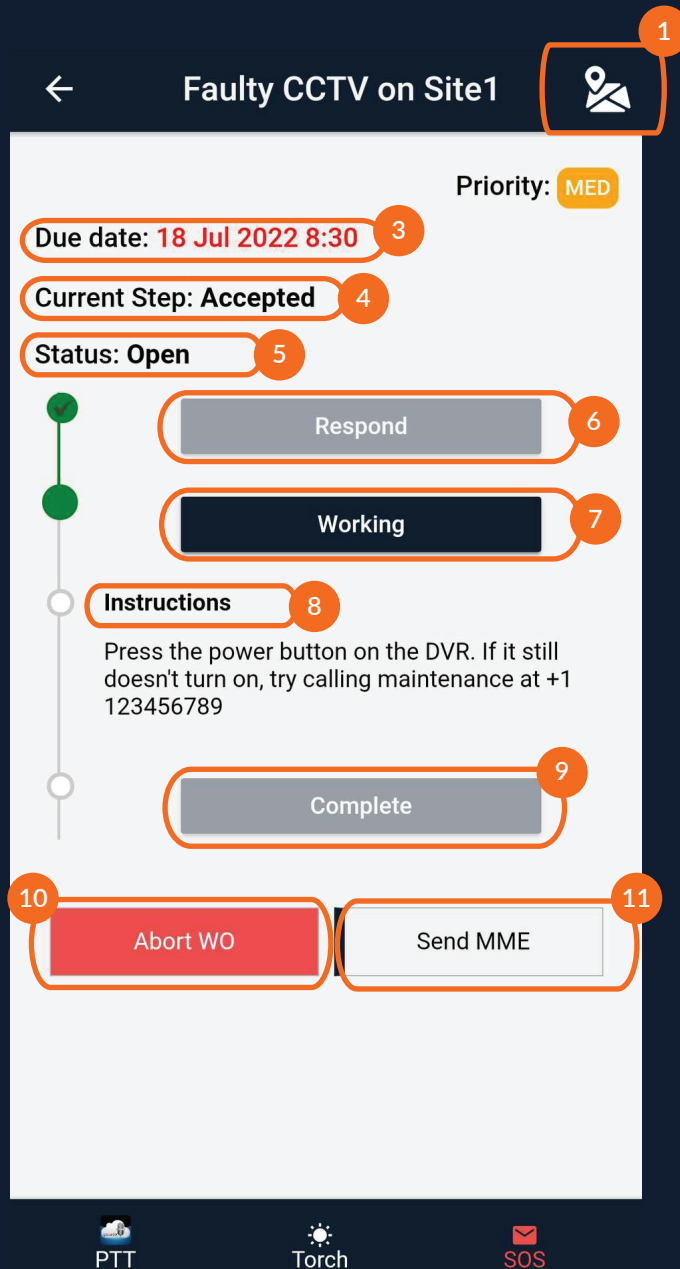
6 Respond

Press "Respond" to Accept or Reject this WO. If you reject the WO, you are prompted to add a reason why (optional). If you accept the WO, you can proceed to the next steps.

Note: To Respond to a WO, you need to be connected to the internet.

7 Working

Press "Working" to declare that you have started working on this WO after you arrived on site.



8

Instructions

Read the Instructions to understand what this WO is about and which steps you need to follow in order to complete it.

10

Abort

Press "Abort Work Order" to abort this WO in case you cannot complete it after you have accepted it. If you abort a WO, you are prompted to add a reason why (optional).

Note: To Abort a WO, you need to be connected to the internet.

9

Complete

Press "Complete" in order to complete this WO. When you complete a WO, you are prompted to add proof of completion (optional).

11

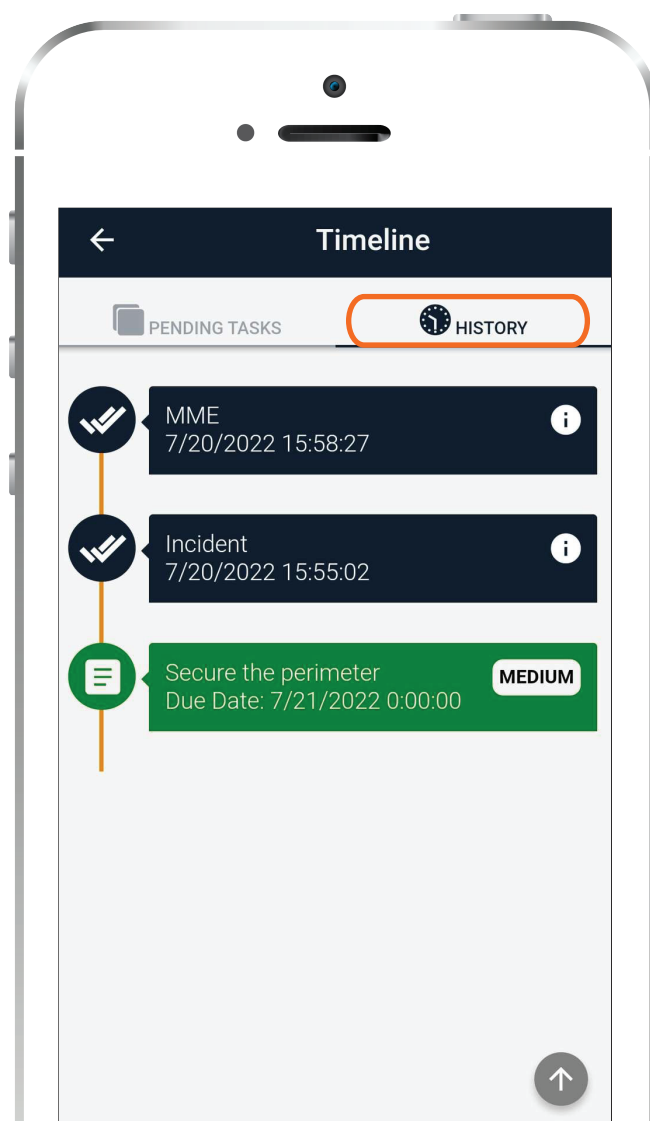
Send MME

Send multimedia elements during any stage of your WO by pressing "Send MME", if you want to report something out of the ordinary, or something worth mentioning before completing your work.

History

In this tab you can view historical data, such as "Completed" Schedules or WOs, or WOs that are "Cancelled" or "Closed". You can also view some other events and actions that you performed during your shift.

To view your history, tap on "History" tab.



Additional resources

- ✓ Complete User Guides: <https://www.qrpatrol.com/user-guides>
- ✓ How to guides: <https://www.qrpatrol.com/how-to-guides>
- ✓ Video tutorials: <https://www.qrpatrol.com/video-tutorials>
- ✓ FAQs: <https://www.qrpatrol.com/frequently-asked-questions>

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QR-Patrol guard tour system

