

BoldTrak User Guide

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Welcome

A Bold Introduction

This manual is intended to provide instruction and reference for core features and functions in BoldTrak.

About Bold Technologies

Bold Technologies, an industry leader since 1981, has stood the test of time in central station and alarm automation software. Formerly known as Bradley On-Line Data Systems, Bold Technologies created the Bold Central Station Automation System and through the years, shaped the development of contemporary alarm monitoring by introducing faster and more sophisticated software innovations. We promote excellence and technological innovation through strategic partnerships and support of organizations dedicated to advancing industry standards. As a proven leader in the security industry, our strength is founded on a company-wide commitment to helping our customer group through superb products and services. This commitment guides our decisions for future development.

About Manitou

Bold Technologies, recognizing that the future was about innovations within the Windows® world, began building the Manitou system from the ground up in 1999. The first sites went live on this new-age monitoring system in 2002. The Manitou system was completely redesigned and revolutionary, opening the alarm industry up to new concepts and ideas. This endeavor completely changed the industry paradigm encouraging broad advancements industry-wide.

About BoldTrak

BoldTrack is a tool to establish boundaries and track devices. Through the use of real-time mapping data and location abilities, BoldTrak provides an simple, easy to use means of monitoring and keeping track of valuable assets and personnel.

How to Use this Guide

This guide has been created with the intent for one topic to flow in to the next and is meant to be viewed as a .pdf or in electronic form. Incorporated herein are overviews, key terms and definitions as well as numerical, step-by-step instructions on how to perform different tasks within the Manitou CS application.

➤ Occasionally, a bullet arrow will be used to designate when only one step is needed to perform an action. In addition, certain icons and standard formatting have been applied to help get the most out of the document's content.

Formatting Key

Formatting	Used for		
<bolded></bolded>	Bolded, Courier font letters in brackets refer to actual keys on the keyboa		
Italicized	Italicized words indicate certain titles such as <i>Alarm Handling</i> window or <i>Jump To</i> menu, as well as to provide emphasis on certain words.		
Bolded	Bolded words are used to signify important data, action paths and software buttons such as OK or Operations > On Test Status .		

Icon Key

Icon	Used for	Description/Formatting example
P	Recommendation/Idea	Suggestions to enhance usage of software functions and features.
	Valuable Information	Any type of information deemed to be valuable such as subject notes and additional information pertaining to the subject matter.
€ %		Reminders of things NOT to do or to be careful and/or aware of.
	Example	Provides examples to further explain topics or steps.

System Requirements

• Manitou CS 1.6.1

BoldTrak requires Manitou CS 1.6.1. In addition, BoldNet Silverlight permissions statuses for Customer and Systems must be set to "Visible" in the Manitou Supervisor Workstation. Although BoldTrak does not have permissions settings in Manitou, it uses BoldNet Silverlight permissions to display Manitou data. Please refer to the Knowledgebase article entitled "BoldTrak requires a BoldNet Silverlight Permissions Status of Visible" for more specific instructions on setting SWS permissions.

Workstation Internet Access

All workstations that will be using BoldTrak must have active internet access in order work properly.

BoldTrak Overview

BoldTrak is a platform device tracking application that integrates into your existing Manitou

software. It can be used to track and monitor anything from people to vehicles. It can also be used to pinpoint any location on its built-in map. Ultimately, BoldTrak offers a robust set of features giving your business the ability to respond to remote and independent alarms and incidents.

This manual will help you utilize the user side of BoldTrak, including but not limited to the management of the following:

- Locating users and devices
- Configuring Device settings speed dials, speed travel restrictions, etc.
- Device/User location
- Locating addresses and geographical sites
- Creating geological boundaries (to keep people/devices in or out of an area)

Familiarization

The BoldTrak main screen is made up of 3 separate sections: Map, *Geofences and Groups* window, and *Devices* window.



Upon initial startup, the Geofences and Groups window as well as the Devices box will be blank. These areas will populate once groups, geofences and devices are set up.

In addition to the main mapping area, easy access to geofences, tracking, changing accounts

and logging out are provided at the top right hand side of the map area.

Adding and Removing a Transmitter in Manitou

Bold charges Customers for BoldTrak accounts based on the number of GPS Transmitter IDs they have in place. Each GPS Transmitter ID corresponds to an individual Personal Emergency Response System (PERS) device. Because of this, the proper setup of the Transmitters you want to use for BoldTrak is very important. It is also important to promptly remove any GPS Transmitters you are no longer using in order to avoid unnecessary billing. Depending on the type of PERS device you are using to connect to BoldTrak, you may have the ability to designate that it send both location and voice signals.

Even if your PERS device does not include the functionality described above, you may still be able to configure multiple Transmitters to perform these different functions. For example, you must have a GPS Transmitter in place in the Manitou Operator Workstation to pinpoint the exact location of the PERS device user. Providing this type of location information is the primary function BoldTrak performs. Customers, however, also have the option of adding an Event Monitoring Transmitter to handle telephone voice calls. Because some BoldTrak users might want to add an Event Monitoring Transmitter, as well as the usual GPS Transmitter, instructions for adding both types are included in this document section.

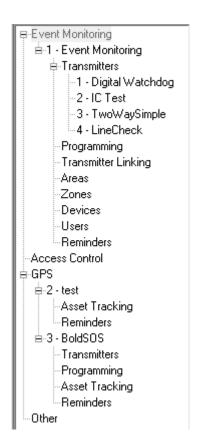
Adding a GPS System

As described above, adding a GPS System and Transmitter in the Manitou Operator Workstation is necessary to pinpoint the exact location of a PERS device user.

Perform the following steps to add a GPS System and Transmitter in the Operator Workstation:

- 1. Open the Manitou Operator Workstation.
- 2. Open the Customer account to which you want to add a GPS Transmitter.
- 3. Select the "Systems" option from the Jump To menu.

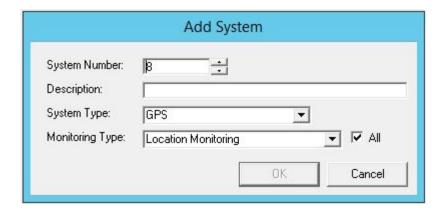
Result: the following System Navigation Tree displays:



Note: your "Systems" Navigation Tree may display differently than the prior screenshot depending on your individual setup.

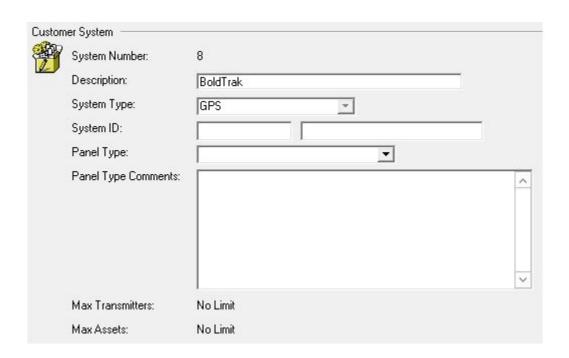
- 4. Select the "GPS" node.
- 5. Click "Edit", and then click "Add".

Result: the "Add System" window displays as shown in the following screenshot:



6. Enter a description into the "Description:" field, and then click "OK".

Result: the "Customer System" form displays as shown in the following screenshot:

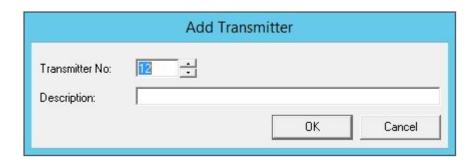


7. Select the "Transmitters" node from the new GPS System you recently added as shown in the following screenshot:

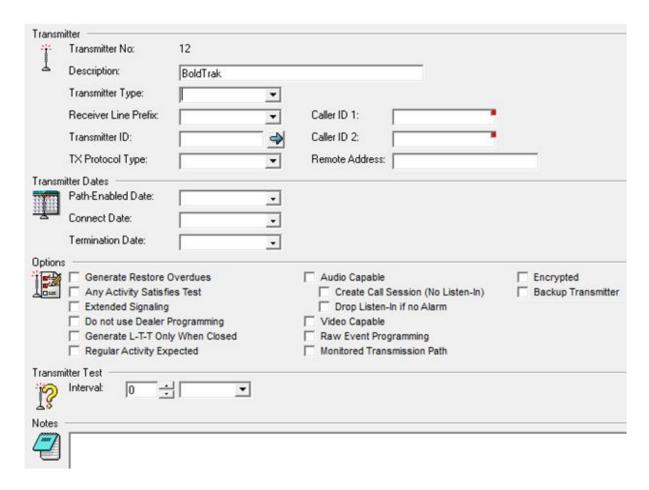


8. Click "Add"

Result: the "Add Transmitter" window displays as shown in the following screenshot:



9. Enter a description into the "Description:" field, and then click "**OK**". **Result**: the "Transmitter" form displays as shown in the following screenshot:



- 10. From the "Transmitter Type:" dropdown menu, select an option with GPS capabilities.
- 11. Select a Receiver Line Prefix from the "Receiver Line Prefix" dropdown menu, or select the default option.
- 12. Enter a Transmitter ID into the "Transmitter ID:" field.
- 13. Enter a Caller ID into the "Caller ID 1:" field
- 14. If you want to designate a TX Protocol Type, select the one you want from the "TX Protocol Type:" dropdown menu.
- 15. Click "Save".

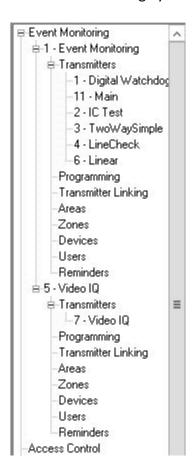
Adding an Event Monitoring System

As described above, adding an Event Monitoring System and Transmitter in the Manitou Operator Workstation is an option that enables BoldTrak users to communicate with Central Station Operators via a telephone voice line. This functionality is in addition to employing the GPS location information described in the previous section.

Perform the following steps to add an Event Monitoring System and Transmitter in the Operator Workstation:

- 1. Open the Manitou Operator Workstation.
- 2. Open the Customer account to which you want to add an Event Monitoring System.
- 3. Select the "Systems" option from the Jump To menu.

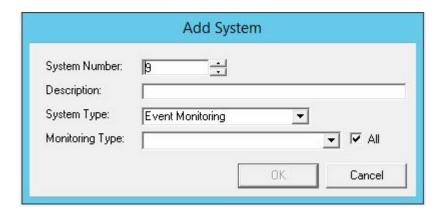
Result: the following System Navigation Tree displays:



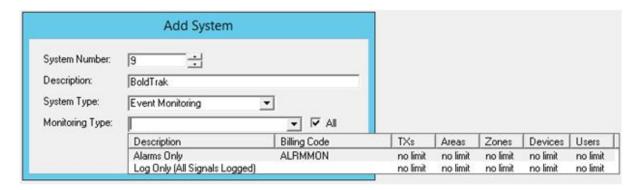
Note: your "Systems" Navigation Tree may display differently than the prior screenshot depending on your individual setup.

- 4. Select the "Event Monitoring" node.
- 5. Click "Edit", and then click "Add".

Result: the "Add System" window displays as shown in the following screenshot:

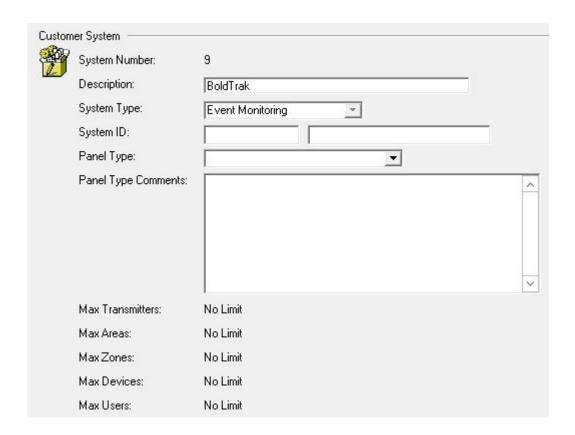


- 6. Enter a description into the "Description:" field.
- 7. Select the "Alarms Only" option from the "Monitoring Type:" dropdown menu as shown in the following screenshot:

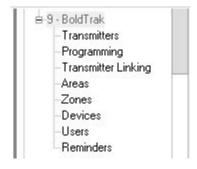


8. Click "OK".

Result: the "Customer System" form displays as shown in the following screenshot:

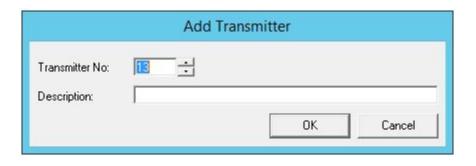


9. Select the "Transmitters" node from the new Event Monitoring System you recently added as shown in the following screenshot:

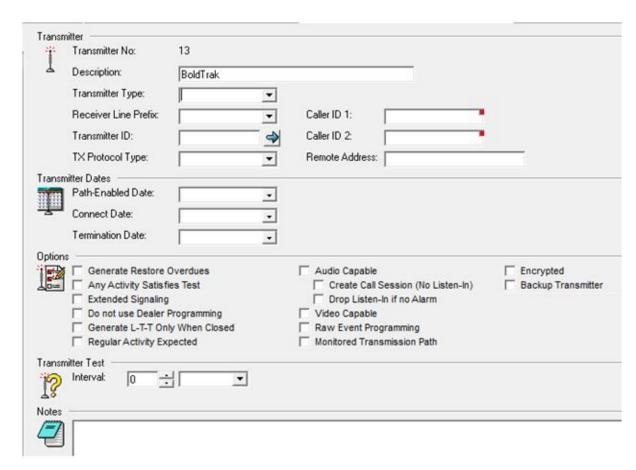


10. Click "Add"

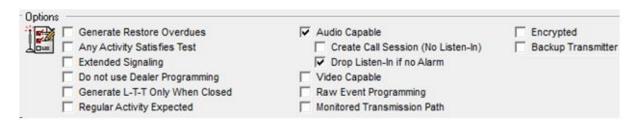
Result: the "Add Transmitter" window displays as shown in the following screenshot:



11. Enter a description into the "Description:" field, and then click "**OK**". **Result**: the "Transmitter" form displays as shown in the following screenshot:



- 12. From the "Transmitter Type:" dropdown menu, select an Event Monitoring option.
- 13. Select a Receiver Line Prefix from the "Receiver Line Prefix" dropdown menu, or select the default option.
- 14. Enter a Transmitter ID into the "Transmitter ID:" field.
- 15. Enter a Caller ID into the "Caller ID 1:" field
- 16. If you want to designate a TX Protocol Type, select the one you want from the "TX Protocol Type:" dropdown menu.
- 17. In the "Options" area of the form, select the "Audio Capable" checkbox and the "Drop Listen-In if no Alarm" checkbox as shown in the following screenshot:



18. Click "Save".

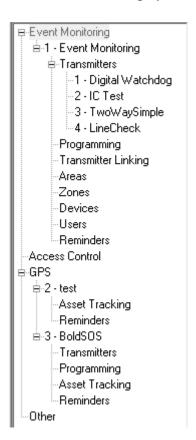
Removing a GPS Transmitter

Because Bold charges Customers for BoldTrak accounts based on the number of GPS Transmitter IDs the Customer has in place. It is also important to promptly remove any GPS Transmitters you are not using in order to avoid unnecessary billing.

Perform the following steps to remove a GPS Transmitter:

- 1. Open the Manitou Operator Workstation.
- 2. Open the Customer account from which you want to remove a GPS Transmitter.
- 3. Select the "Systems" option from the Jump To menu.

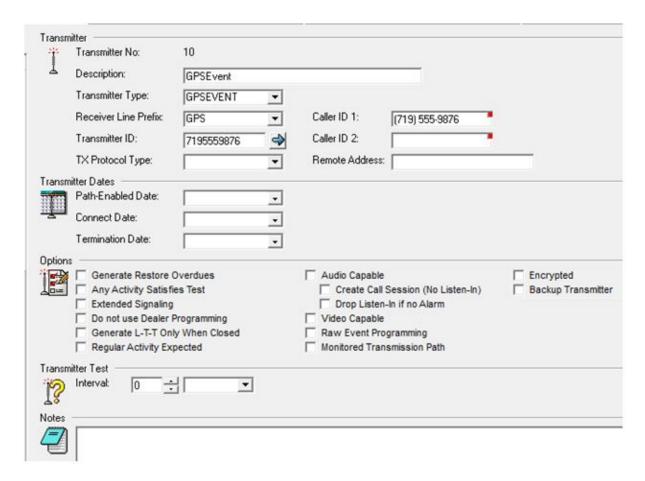
Result: the following System Navigation Tree displays:



Note: your "Systems" Navigation Tree may display differently than the prior screenshot depending on your individual setup.

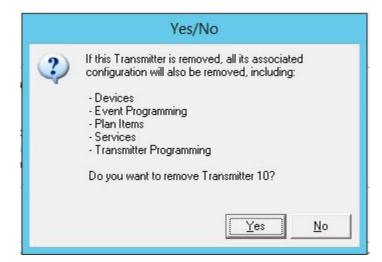
5. Navigate to the "GPS" node, and select the Transmitter you want to remove.

Result: the Transmitter you selected now displays on the Transmitter form as shown in the following screenshot:



6. Click "Edit", and then click "Remove".

Result: the following "Yes/No" window displays:



7. If you are certain that you want to remove the Transmitter, click "Yes". Result: the system removes the GPS Transmitter.

Getting Started

BoldTrak is accessible through the web portal and also through a customer account within Manitou. For the sake of consistency, this document directs usage through the internet connection.

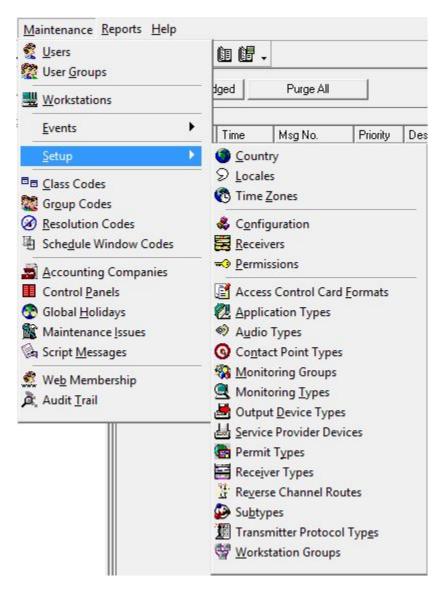
All workstations that will be using BoldTrak <u>must</u> have active internet access in order work properly.

BoldTrak Permissions Requirements

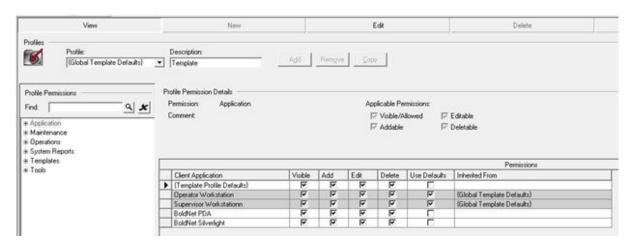
In order for all the BoldTrak features to properly function, you must properly define user Permissions in the Manitou Supervisor Workstation.

Open the Manitou Supervisor Workstation.

Navigate to the "Maintenance" menu, and select "Setup" and then "Permissions" as shown in the following screenshot:



Result: the following window displays:



The following minimum Permissions must be designated as described:

Note: although you may grant more user Permissions than those described, granting fewer Permissions could result in degraded functionality.

Geofences - expand the "Maintenance" node, and then expand the "General" node. BoldNet Silverlight Permissions for "Geofences" must be designated as "Visible".

Customer - expand the "Maintenance" node, and then select "Customer". BoldNet Silverlight Permissions for "Customer" must be designated as "Visible".

Activity Log - expand the "Maintenance" node, and then expand "Customer". BoldNet Silverlight Permissions for "Activity Log" must be designated as "Visible".

Alarms and Signals - expand the "Maintenance" node, and then expand "Customer". Expand "Activity Log". BoldNet Silverlight Permissions for "Alarms and Signals" must be designated as "Visible".

Systems - expand the "Maintenance" node, and then expand "Customer". BoldNet Silverlight Permissions for "Systems" must be designated as "Visible".

Areas - expand the "Maintenance" node, and then expand "Customer". Expand the "Systems" node. BoldNet Silverlight Permissions for "Areas" must be designated as "Visible".

Areas Description - expand the "Maintenance" node, and then expand "Customer". Expand the "Systems" node, and then expand the "Areas" node. BoldNet Silverlight Permissions for "Description" must be designated as "Visible".

Transmitters - expand the "Maintenance" node, and then expand "Customer". Expand the "Systems" node. BoldNet Silverlight Permissions for "Transmitters" must be designated as "Visible".

Transmitters Description - expand the "Maintenance" node, and then expand "Customer". Expand the "Systems" node, and then expand "Transmitters". BoldNet Silverlight Permissions for "Description" must be designated as "Visible".

Launching the BoldTrak software

To access BoldTrak, begin by navigating to the BoldTrak service in your web browser.

The web address will be: servername/BoldTrak.

Log In

- 1. Type in the **Username** and **Password**.
- 2. Click Login.



Login screen

Open a Customer Record

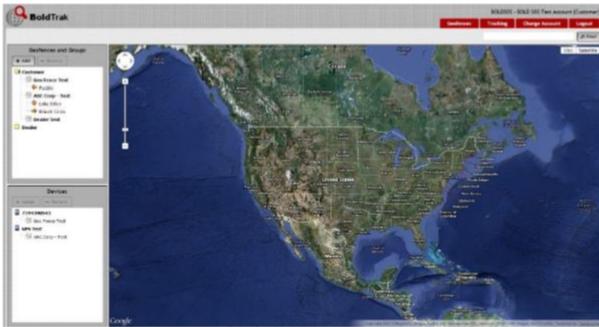
Once logged in, an account may be selected.

- Search for an account using the search function. Type in a partial or whole company name and click the **Search** button.
 - The asterisk (*) may also be used as a wildcard.
- Go to your home account (company's account) by clicking the **Use home account** (Central Station) link.



Account selection/search screen

Once a customer account is loaded, the BoldTrak main screen will appear.



BoldTrak main screen

Adding Groups, Geofences and Devices

The first step to organizing and using the BoldTrak software is to setup groups, geofences and devices to the account record.

 $ilde{\Box}$ A group <u>must</u> be created prior to attempting to establish a geofence.

Add a User

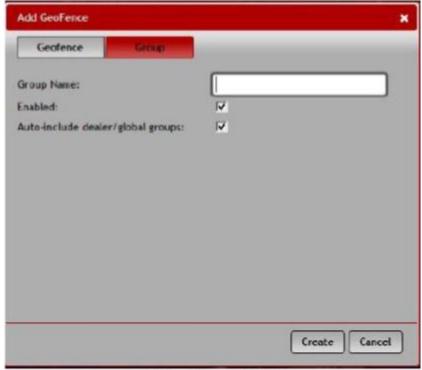
Create a Device

A device must first be created as a GPS Transmitter in the Systems of a Customer Account.

- Because devices may be moving in and out of several different geofences, devices cannot be assigned to a specific device. Devices, once created, are assigned to groups.
- 1. Access the Customer Record in Manitou Operator Workstation by using the Maintenance menu: Customer. Either look up by Customer ID or the Customer Quickload function.
- 2. Click **Systems** in the *Jump To* menu and create a GPS Transmitter on the Customer Account.
- For more information on looking up a customer record and adding a Transmitter, please refer to the Locate a Customer Record and Add a New Customer Section: New Customer Systems in your Manitou User's Guide.

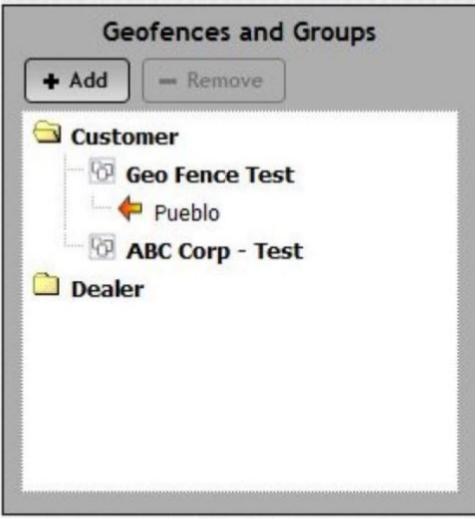
Add A Group

To add a group to BoldTrak, from within the module, click the **Add** button in the *Geofences* and *Groups* section.



Add a Group dialog

- 1. Select the **Group** button at the top of the Add dialog box and fill in a **Name**. There is a 60-character limit for this field.
- It is recommended to make the Group name directly relatable to the Group information for easy reference. Example: If setting up a Group for ABC Corp drivers, consider "ABC Corp" or "ABC Corp Drivers" as the Group name.
- 2. By default, the dialog box has the boxes checked to activate Enabled and to Auto-include the dealer/global groups.
 - If the Group will not be shown and enabled, uncheck the **Enabled** checkbox.
 - If the dealer and global groups associated with this group should not be shown, uncheck the **Auto-include** option.
- 3. Click Create.
- 4. The Group is now visible in the Geofences and Groups window.



Group list

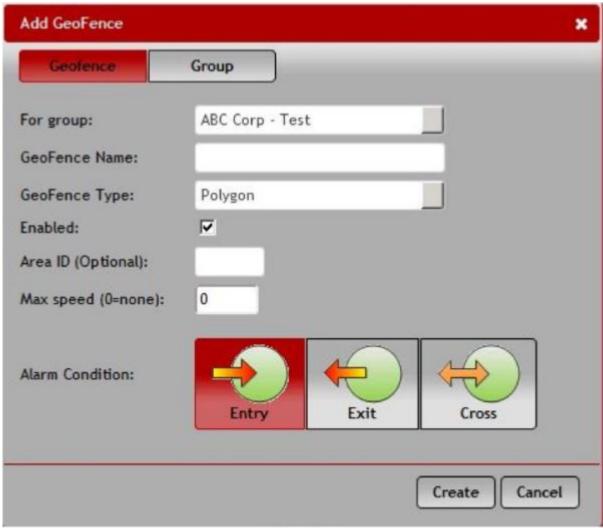
Removing a Group

➤ To remove a group, highlight the group's name in the *Geofences and Groups* window and click the **Remove** button.

Add a Geofence

Now that a group has been established, a geofence can be created for it.

- Multiple geofences may be created for one group.
- 1. Select the Group name from the Group list to highlight it.
- 2. Click the Add button.



Add geofence

- 3. In the *Add Geofence* dialog box, identify the specs for the geofence.
 - Specify a **Geofence Name.** There is a 60-character limit for this field.
 - Select **Geofence Type**: Circle or Polygon for click-and-define boundaries.
 - There are no limits on points of a polygon geofence; as many sides as needed may be created to establish the preferred geofence.
 - Designate whether this geofence will be **Enabled** or not.
 - Optional: Give the geofence area a unique ID
 - Optional: Set a Max speed. The max speed allows a maximum speed limit to be set.
 While within the geofence, if a vehicle exceeds Max speed settings, an alarm will be sent in to Manitou.

- 4. For the **Alarm Condition**, select whether the geofence will notify upon entry into the boundary, exit out of the boundary, or both.
- 5. Click Create.

Establish Geofence Boundaries

Now, Boldtrak will return to the map, turning the cursor into crosshairs to draw out the geofence.

- 1. Click and drag to create a circle around the geofence boundary or click the map for each point in the polygon.
- 2. Release the mouse button to set the circle geofence or to close the polygon, click on the starting point again.

Map functions are still available while designing the geofence.

- To move the map, click and hold the cursor and drag the map position across the screen.
- To zoom in or out, position the cursor on the plus or minus, or slide the zoom bar, as normal.
- Use the **Find** feature in the top right corner of the map to locate a specific area quickly.

Now the geofence will show under the group it is associated with. It will also show whether the geofence is an entrance, exit or cross boundary.



Geofence list with designation

Once it has been created, click on whtat the the geofence in the Geofences and Groups window. Three buttons appear at the top of the frame.

- Edit edit the border/size of the geofence.
- Properties shows and allows adjustments to be made to the geofence properties.
- **Show** toggles whether or not the geofence can be seen on the BoldTrak mapping area. However, even with the geofence not shown on the map, a faint outline will still be present.

Deleting a Geofence

➤ To delete a geofence, highlight the geofence in the *Geofences and Groups* window and click the **Remove** button.

Assigning a Device to Group

Now that groups, geofences and devices have all been created, assign a device to a group.

- 1. Access BoldTrak by clicking on **GPS Tracking** in the *Jump To* menu.
- 2. Click on the Group you with to assign the device to in the *Geofences and Groups* window, then click on the device to assign in the *Devices* window.
- 3. Click the **Assign** button in the *Devices* box.

The assigned group will now be displayed under the device.

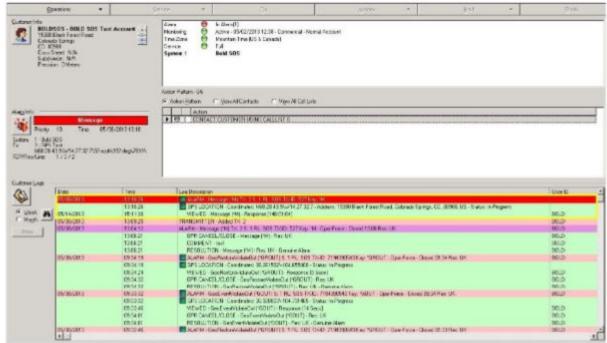
Removing a Device

- To remove a device from a group, click on the group underneath the device in the Devices window.
- Click the Remove button in the Devices box.

Tracking Devices

Alarms

Once an established boundary is violated in a geofence, an alarm will be sent in to Manitou, allowing operators to handle according to normal processing procedures. From within a customer record, the BoldTrak module can be accessed using the **GPS Tracking** link on the *Jump To* menu. This will show the location of the device and geofence information at the time the violation was committed.



Geofence Violation alarm example

Tracking Locates

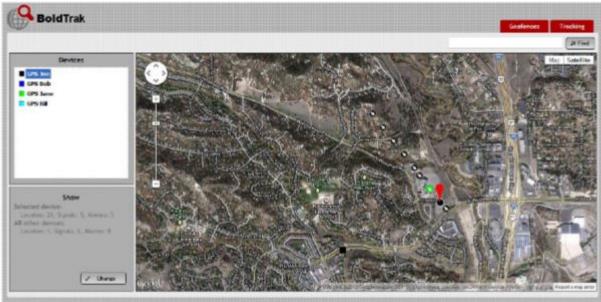
The map may be used to track the location of devices for accurately determining where a device is or what device may be closest to a particular incident or event. Currently, BoldTrak the last 20 locates for a particular device.

To track a device, click the **Tracking** tab at the top of the BoldTrak map area.

From the list of devices in the *Device* window, click on the appropriate device for tracking.

The map should zoom in to the area where the device is located, and populate with red, yellow, and color-coded locate markers.

- Red flag indicates an alarm
- Yellow flag shows previous alarms
- Locate color locates are color-coded and are user-defined. There are 16 individual
 colors to choose from. Once all 16 have been assigned, the colors will then repeat
 themselves. In the example below, the legend shows Joe is designated with the color
 black. Looking at the tracking map, you can see the last 9 locations where Joe was as
 well as where he is currently. Additionally, an alarm was triggered as designated by
 the red flag.
- Locate shape circles indicate previous locates; squares denote most current or lastknown locate



BoldTrak tracking example

The *Show* window located at the bottom right of the BoldTrak screen (as seen in the image above) will show the the amounts of Locates, Signals and Alarms that will be shown on

screen. The default amounts of devices is as follows:

• Selected device: Locates: 20, Signals: 5, Alarms: 5

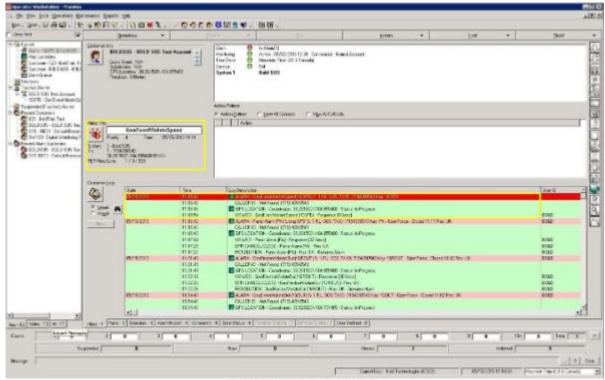
• All other devices: Locates: 1, Signals: 0, Alarms: 0

> Click the **Change** button to adjust the amounts.

It is important to note that when accessing BoldTrak through the Manitou client, cookies will not be saved. Therefore, the active defaults of Locates: 20, Signals: 5 and Alarms: 5 will be the standard operating amounts within Manitou.

Monitoring Speed

Just as with geofence violations, speed violations will send in an alarm as well.



Speed violation alarm example