Getting your Patrol's ERS up and running
V2.61

<u>This is best achieved on a Personal Computer as this activity is not suited to a mobile device</u>

Your very first step is to set up your new Community Patrols email on your device.

You may prefer to refer to your device manufacturers manual to set-up an email.

Actual set up procedures vary, but generally, on Android devices, you will go to [Settings] and then to [Accounts]
Select [Add an account]
Select the [Personal (POP3)] option

Enter your new patrol email address = YourCallsign@communitypatrols.nz
(this is the email address associated solely with your device)

Select [MANUAL SETUP]
Select [Personal (POP3]
[NEXT]
Enter your new patrol email password
[NEXT]
Add "mail." To the beginning of the [Server] name. i.e.
mail.communitypatrols.nz
[NEXT]
(you will be presented with a very similar screen to the previous one)
Again, add "mail." To the beginning of the [Server] name. i.e.
mail.communitypatrols.nz
[NEXT]
You may receive page regarding the server security. This email account does not require secure access.
Scroll to the bottom of the page and select [Continue]
You can leave the [Account Options] as they are, when you see that page.
[NEXT]
When you receive a page saying "Your account is set up…", you can change the displayed details or leave them as they are.
[NEXT]
All done!

Once you have your new patrol email set-up and ready to receive email on your device, we can move on to setting up your ERS.

Logging in for the first time.

Using your web browser, go to: https://www.zoho.com/creator/signin.html
In the field [Email / Phone:] enter your username which is the email you previously set up and will be will be formatted as [your patrol call-sign]@communitypatrols.nz
In the [Password] field enter the password given to you.

This the general password, not to be confused with the Admin Passphrase used by the Patrol Administrator when editing reports.
(More on this below)

Once you are logged in you will see a screen like the graphic above.

Select [Report]

If this is the first time you have been here, you will need to set up your administrator passphrase. Follow the on-screen instructions to carry this out. (You may have already been supplied with temporary details to get you underway)

Now that you have set up your passphrase, you will see this on the screen when you select [Report]

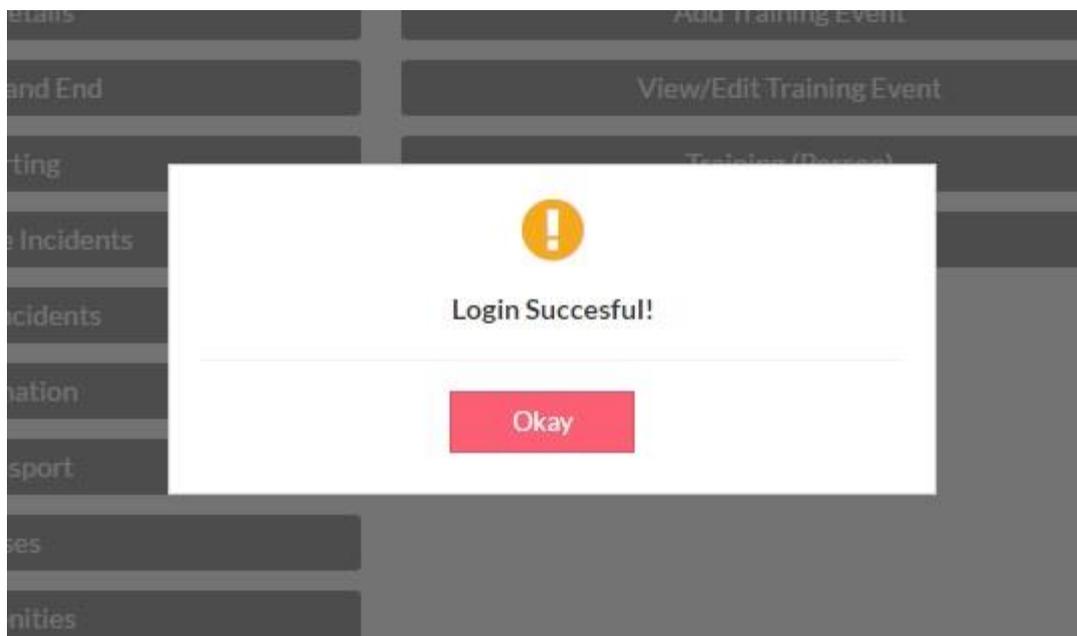Select the same question that you used to set up your passphrase.

If you forget your passphrase question or answer, use the [Reset Passphrase] button to reset it.

You will receive a link to reset it via email to your **new patrol email address.**

When you have successfully answered the passphrase, you will see this message.

Firstly, you must complete the setting up of your patrol / vehicle details.

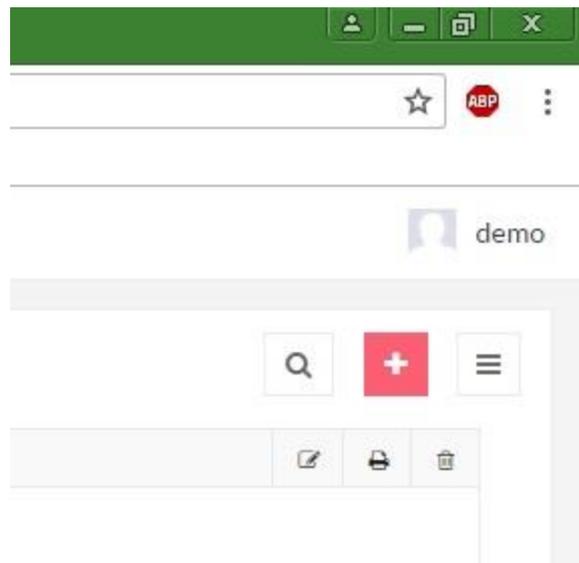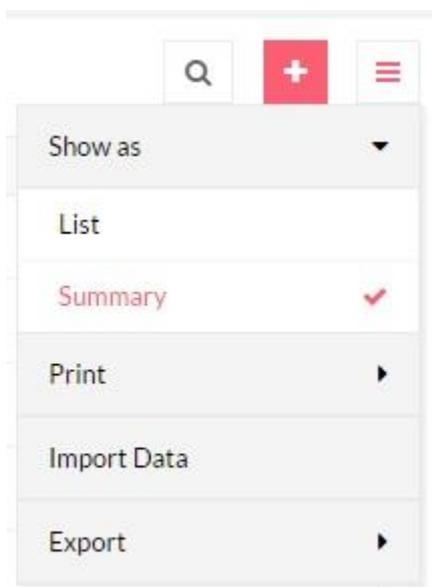Do this by selecting [Patrol Setup] from the available options.

NOTE

All reports have optional ways to view them.

On the top right of you screen you will see the Magnifying Glass – Plus Sign – Hamburger as indicated below the word demo, here.

Under [Show As] you can select either [List] or [Summary]
This is your choice and you can switch between them at any time.

This is one view of the [Patrol Setup]

Fill in all the fields with your data.

Patrol Report

Patrol Name	DEMO
Patrol Call Sign	demo123
Comms Phone	0800123456
DCC Phone	04123456
Vehicle Type	Nissan Van
Vehicle Registration	NZCP21
Warrant of Fitness Expires	01-Dec-2018
Vehicle Registration Expires	01-Nov-2018
Patrol Email	demo@communitypatrols.nz
Patrol Notification Email Addresses	grant.edlin@communitypatrols.nz
Littering Email Addresses	grant.edlin@communitypatrols.nz
Graffiti Email Addresses	grant.edlin@communitypatrols.nz
Street Light Email Addresses	grant.edlin@communitypatrols.nz

NEW

Notification emails will be sent to all those addresses shown in that field. Separate each address with a comma.

Email addresses. Multiple email addresses to be separated by a comma.

Patrol Notification Email Addresses	grant.edlin@communitypatrols.nz,cpnz@communitypatrols.nz
Littering Email Addresses	grant.edlin@communitypatrols.nz,cpnz@communitypatrols.nz
Graffiti Email Addresses	grant.edlin@communitypatrols.nz,cpnz@communitypatrols.nz

To add your localised data to the various reporting options offered in your Patrol Admin Dashboard, the steps are very similar in each report. The example used here is for the [Patroller Details] report.

Select your report name [Patroller Details].

No records match your specified criteria!

Add a Record   or   Import Data

Initially there will be no records in your reports, so you will see this option.

You can either select [Add a Record] to add one patroller at a time or select [Import Data] to bring in large numbers of patroller details in a few easy steps.

Import Data for "Patrollers" [Step 1 of 3]

File Type	Excel

Data Location   ⦿ Local Drive   ○ Paste Data   ○ Cloud   ○ Desktop Uploader

Choose the file to Upload | Browse | |

(Supported file formats : .CSV, .TSV, .XLS, .XLSX and .TXT)

Note:
- Column names in the data should match with field label names.
- Data size should be less than 5MB and the number of rows should be less than 100000
- To upload more, contact support@zohocreator.com

[Next]   [Cancel]

You can create spreadsheets using the templates available on the website http://CommunityPatrols.NZ or use one of the other bulk uploading options available here. In this example, we are simply using standard cut & paste commands to include the data.

If you have a list of your patrollers in almost any format (Excel. Word, Text etc.) you can cut that information and paste it using the option shown here.

We recommend the data you use for patrollers is formatted as:

First name - Last name - Mobile Phone number - Patrol email address.

The patrol email address is compulsory.
Not including it in EVERY ONE OF YOUR RECORDS will render the ERS unworkable.

Import Data for "Patrollers" [Step 1 of 3]

File Type	Excel

Data Location   ○ Local Drive   ● Paste Data   ○ Cloud   ○ Desktop Uploader

Copy and paste your CSV, TSV ... file content here!

```
Bill     demo@communitypatrols.nz
Jane     demo@communitypatrols.nz
Harry    demo@communitypatrols.nz
Mary     demo@communitypatrols.nz
```

Note:

- Column names in the data should match with field label names.
- Data size should be less than 5MB and the number of rows should be less than 100000
- To upload more, contact support@zohocreator.com

[Next]   [Cancel]

Import Data for "Patrollers" [Step 2 of 3]

You need to ensure you match the fields correctly.

Use the drop-down menus to match your columns with those used by the ERS. Then select [Import Data]

First row of the data is field label names   ○ Yes ● No

Preview Data   Show CSV Settings

☑ Column 1	☑ Column 2
Patroller Name (First Last Mobile No.)	Patrol Email
Bill	demo@communitypatrols.nz
Jane	demo@communitypatrols.nz
Harry	demo@communitypatrols.nz
Mary	demo@communitypatrols.nz

On Import Errors :   Skip Corresponding Rows

New Import   [Import Data]   Cancel

When you have completed the import, you will receive a message like this. Select [Close] and a few moments later you will be transferred back to the original view, but now showing all your patrollers names.

Import Data for "Patrollers" [Step 3 of 3]

Patrollers Report

👁 ☐	Patroller Name (First Last Mobile No.) ⇕	Patrol Email ⇕
☐	Mary	demo@communitypatrols.nz
☐	Harry	demo@communitypatrols.nz
☐	Jane	demo@communitypatrols.nz
☐	Bill	demo@communitypatrols.nz

CONGRATULATIONS!

We have included two quick access reports for you to see the status of your current patrolling, at a glance.

These reports are for viewing only and cannot be edited.

The reports only cover the current and previous two days.

They are primarily to allow you to have a quick check on who is on patrol and their current status.

If a patrol still indicates it is "current" when you know it has ended, this is most likely because a [Patrol End] was not triggered by the patrol.

This area is also where users return to, to complete their "End Patrol" report.