

# Safeguard Web Portal Set-Up Tutorial

Version 3.0

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# 1. LOG IN

• To log into the system enter the URL <u>http://www.nfcafrica.com/clientname/web</u>. A credentials entry page will open as shown below

#### Fig. 1.1 Log in screen

- Enter the Username and Password allocated to you by the administrator from NFC Africa or from your organization
- When successfully logged in the system homepage will open with the menus visible based on the user rights allocated

NFC Africa			g	SafeG	uard				▲ NFC Africa > admin
me Master Setup Client Ma	mager HR Manager	Site Manager	Reports	Messages	Incentives	Help			
Today's On-Shift On Time B	Exception Report (02	-Mar-2016 12:0	0 hrs)						
CLIENT	SITE			SECURITY OFFIC	ER	PAYROLL #	EXPECTED TIME IN	ACTUAL TIME IN	VARIANCE
Gilgil Treatment Industries	Zone 1 (Ray	v Pole Area)		Zone 1 Day (	New)	111	06:00	-	
		rkson)		Zone 3 Day (	New)	86	06:00	-	
Gilgil Treatment Industries	Zone 3 (Eric	LKSOII)				00			
Gilgil Treatment Industries Gilgil Treatment Industries	Zone 3 (Eric Zone 4 (A R	C)		Zone 4 Day (	New)	4	06:00	06:07:17	00:07

#### Fig. 1.2 Homepage view

# **2 CLIENT SET-UP**

To set up a new Client in the system Click on the Client Manager menu item from the main menu

NFC A	frica			9	SafeG	uard				L NFC Africa > a
iome Master Setup	Client Manager	HR Manager	Site Manager	Reports	Messages	Incentives	Help	-	-	-
Home / Client Setup /	Setup									
Enter Client Detail	s									
Client ld *										
Client Name *										
Master Email *										
Туре	Residential		$\sim$							
	Next >> C	ancel								

#### Fig. 1.3 Client Set-up form

- Enter the details requested
- The client ID is given by the system administrator
- The Email entered should be the primary email to be contacted on behalf of the client in case of any communication
- Click on the *Next >>* button.
- It will open the **Client Manager** to continue with the set-up

## **3.CLIENT MANAGER**

This is the management screen that is used both for initial set-up of the client and the information related to the client.

From the client manager you have the ability to carry out the following functionalities

- Add a Contract using information from the NFC Safeguard Clients Service Contract
- Add a Site and associate it with an already entered contract in the system
- Navigate straight to the Site Manager with the already pre-existing filters on the site of choice
- View the listing of all patrol points and can filter to view specific patrol points using key words

Client Details		Quick Client Sta	ats.		
lient Huskies 🗸		Contracts	Sites	Patrol P	oints
NAME	VALUE	U	U	U	/
Client ID	Client 1				
Client Name	Huskies	al Patrol Points			
Created On	02 Mar, 2016				
Contracts		Filtering Words:			
Filtering Words:	Add Contra	TAG SERIAL	PATROL POINT	TAG TYPE	SITE

Fig. 1.4 client set-up view

## 3.1 To add a Contract using Site Manager

- Ensure the correct client is selected in the *Client ID*. If not, select the correct client and wait for the page to load fully before proceeding
- Click on the Add Contract button
- The contract details form pops up and you are able to add the details of the contract appropriately as shown below

	F	iltering Words:	
	L Contract Details		
A	Start Date *		'AG T
н	End Date *		
ands	Contract ID		
	Security Officers		
		Save	
			_

#### Fig. 1.5 Contract details form

**NB:** The contract ID is given by the originating entity of the contract.

- Click on save to save the contract details into the system
- The contract now appears in the *Contracts* section of the Client manager

## 3.2 To add site via the Client Manager

• Navigate to the specific contract to add a site to under the contracts section

- Click on the Add Site Link that is adjacent to the contract
- The add site pop up form
- Enter the details of the new site appropriately in the form as shown below
- Mandatory fields are indicated by a \*. Contact details are useful to drive automated reports
- Scheduling Automatic or Manual decision: this is an important decision which cannot be reversed or edited. Automatic site set up is primarily for simple sites with low complexity. Manual site set-up should be selected for more complex sites.

Home Master Setup Client Manager HR Manager Site Manage		_
	Scheduling Automatic	<b>*</b>
Client Manager > Client : Huskies	Parent Site* None	<b>√</b>
* Client Details		
Cliant	Site ID *	
Huskies	Site Name *	Patrol Points
NAME VALUE	Master Site Email	0
Client ID Client 1	Primary Contact Details:	
Client Name Huskies	Primary Contact Name	
Created On 02 Mar, 2016	Primary Contact Mobile	
Contracts	Scheduling Automatic   Scheduling Automatic   Parent Site* None  Parent Site Name *  Site ID *  Site Name *  None  Patrol Points  Patrol Points  Primary Contact Details:  Primary Contact Details: Pr	
View All Contracts	Secondary Contact Details:	TAG TYPE SITE
CONTRACT ID START DATE END DATE SITE NAME BRANCH NA	Secondary Contact Name	
Contract 1 01-03-2016 31-12-2016		_
	Secondary Contact Mobile	

#### Fig. 1.6 Site Details Form

- If the site is a child of another site, select the parent site from the *parent* Site dropdown otherwise **leave the choice as none if not applicable**.
- Enter the Site ID as it occurs from a source system, otherwise enter the NFC Africa site ID
- Select the branch to which the Site belongs (if need be consult with the administrator for guidance).
- Shift start offset: this function allows you to mandate a minimum amount of time in minutes after the start of a shift before which no patrols will be allocated (typically 10 to 15 minutes)
- Select branch: if you run a multi branch operation then you will need to create branches under Settings/Manage Branches and select the appropriate branch.
- Click on save to save the new site
- The site now appears under the *Sites* section in the Client Manager

• To proceed to manage your site and set it up with more options, click on the link *Manage Site* adjacent to the site that you intend to manage. This will open the site manager (See photo 1.7



- 1. You can view quick stats about your client at any one point by looking at the *Quick client's stats* section in the client manager
- 2. You can filter a list using keywords by typing in any textbox written Filtering words in the client manager

## **3.3To navigate to the Site Manager from the Client Manager**

• Click on the Manage Site Link adjacent to the site you want to manage

## **4.SITE MANAGER**

The Site Manager is used to edit and manage the details and information of a site in the system. The site manager can be accessed in two ways:

- By clicking directly on the Site Manager from the main menu
- By clicking on the Client Manager from the main menu. Go to the Sites section and click on the *Manage Site* link adjacent to the site you wish to edit.

There are several functions that can be done from the Site Manager view:

- View and edit the site details of a specific site
- Add or edit shifts to a site
- Allocate (or edit) staff to a certain shift for a certain period i.e. rostering
- Allow you to add or edit patrol routes and patrol route sequences against the routes

## 4.1 To view the details of a site

- Under the *Client Details* section select the client ID if not yet selected
- Then proceed to select the specific site from the Site dropdown after the Client ID
- Click on the View button and wait for the page to load fully

Home	Client Setup	Client Manager	Site Manager	Client M	Aenu Timesheets	Patrols	Reports	Charts	Settings	Help		
Site Ma	anager > C	lient : Huskie	s > Site : Na	irobi S	tore [Manual §	Scheduli	ngl					
\star Cli	ent Details				all Patrol Points							
Client	Name				TAG SERIAL	PA	ATROL POINT			TAG TYPE	SITE	
Husk	ies	÷			34dfd349	re	ear gate			Secondary	Nairobi Stor	e
Site Na	ime				d415d449	m	ain gate			Primary	Nairobi Stor	e
Nairo	bi Store	Ŷ	View									
NAME		VALUE										
Site II	D	NS1			Patrol Route S	equence						
Mast	er Email											OAdd Patrol Route
Schee	duling	Manua	al									
Site N	lame	Nairob	oi Store		ROUTE NAME	SHIFT	REAR GAT	re MA	AIN GATE	PATROL DURATION	PATROLS PER SHIFT	ACTION
Clien	t Name	Huskie	es		weekend patrol N	N	2	1		10	12	⊠ ×
Bran	ch	NFCAR	RICA HQ				Ø	(	Z			
Creat	Client Setup     Client Manager     Si       Manager > Client : Huskles >        Client Details     •       th Name     •       irobi Store     •       e ID     VALUE       e Name     NS1       enduling     VALUE       e Name     VALUE       enduling     VALUE       e Name     NS1       enduling     VALUE       ent Name     VALUE       indeduling     VALUE       ent Name     VALUE       ent Name     VALUE       indeduling     VALUE	g 2014		weekday patrol N	N	2	1		10	12	⊠ ×	
Shift	Offset (Minutes	5) 25					Ø	(	Z			
NFC	Jnique ID	55			weekend patrol D	D	1	2		10	12	x v

Fig. 1.7 Site Manager View

## **4.2 The NFC Unique ID**

This is the unique system generated ID for the specific site that will be used by the NFC Africa system. This unique ID is crucial when setting up the primary point of the site via the mobile app as it will be used to authenticate the site name.

## **4.3Patrol points**

- Primary and secondary patrol points are added via the mobile app. Refer to NFC Africa Administrator Mobile App Tutorial version 3.0
- The added patrol point should be listed under the *patrol points* section in the site manager view, the type will be listed as primary or secondary

## 4.4To add Shifts to a site

- Click on the Add shift button under the shifts section in the site manager
- The Shifts form pop-ups as shown below

Pat			-	
<b>1</b>	Shift Details			
	Code*	Please Select		●Add Patr
ROUTE	Start Time*		N	MAX
Route leo	End Time *			12
		Save		

Fig. 1.8 Shift details Form

- Select the shift code and enter the start time and end times of the shift
- In the event that no shift codes have been set up, go to Settings/Manage Shift Codes to define

**NB:** To enter the time just click inside the textboxes and in the sliders that appear click on the slider and slide to the hour and minute required.

Code*	Please Select
Start Time*	06:00
End Time *	Choose Time O6:00 Hour Minute
	Now Done

#### Fig. 1.9 Time sliders to aid in time entry

- Click on *done* in the time sliders to enter the times
- Click on save on the Shift details form to enter the shift in the Site Manager
- The new shift details will now appear under the Shifts section of the Site Manager

## 4.5To add a Patrol Route to a site

- Patrol routes set the activity sequence for guards
- In the site manager view click on the *Add Patrol Route* button in the Patrol Route Sequence section
- The Patrol Route addition form opens as shown below

							•		
Master En	nail		53	41b7b8	East Wall	Secondar	ry	Test Site	2
Schedulin	g	Manual	23	7cb3b8	Main Gate	Primary		Test Site	e
Site Name	2	Test Site							
lient Nar	ne	Client Test							
Branch		test branch		Add Patrol Rou	ute		_		
Created O	n	13, Nov 2015			+			OAdd Pa	atrol Rout
hift Offse	et (Minutes)	10		Patrol Route Nan	ne*			<b>G</b> Add Fa	
NFC Uniqu	ue ID	79		Shi	ift * Select Shift	$\sim$	PATROL	PATROLS	
PRIMARY CO	INTACT		RO	l Patrol Duration(M	ins)		DURATION	HOUR	ACTION
Name	Moore Collins		Ar	n	π		2	10	Ø
Aobile	0706260151			Patrols Per Hou	JL *				
Email	moorecollins6	@gmail.com	Cle	þ	Save Cancel		2	10	Ø
Email	moorecollins6	@gmail.com		[	Save		2	10	
SECONDARY	CONTACT								

Fig. 2.2 Patrol Route addition form

• Name the route to be added and select the shift where the route is applicable

- Set the maximum time it's supposed to take to complete the route (maximum allowable time is 59 minutes)
- Set how many times the route to be done in one shift by entering the figure in the Max Occurrences textbox. For example:
  - For hourly (on average) routes in a 12-hour shift, select 12
  - For routes every 15 minutes (on average) in a 12-hour shift, select 48
- Click on save to save the patrol route
- The new route is added to the list of patrol routes under the *patrol routes* section of the site manager with all the patrol points of the site listed as columns but with blank values in the new patrol route

## 4.6To add patrol sequence to a Patrol Route in Site Manager

- Navigate to the specific patrol route where you wish to enter the patrol sequence
- Identify the order of patrol points in the patrol route you require by starting at 1 and numbering upwards
- Click on the pencil next to the textbox on the patrol point you wish to order to make the textbox editable
- Only apply a sequence number to a patrol point if it is required to visit that patrol point on that route (it is ok to leave patrol points with no sequence)

] Patrol Ro	ute Sec	luence							
								OAdd Pat	rol Route
ROUTE NAME	SHIFT	DOG HOUSE	FENCE	BACKDOOR	PARKING	GATE	MAX DURATION	MAX OCCURRENCES	ACTION
Route 1 ya leo	D	Ø	1	2 (			10	12	Ø

### Fig. 2.3 Patrol sequence

• The textbox becomes editable and the pencil changes to a tick as shown below

								●Add Pat	rol Route
ROUTE NAME	SHIFT	DOG HOUSE	FENCE	BACKDOOR	PARKING	GATE	MAX DURATION	MAX OCCURRENCES	ACTION
Route 1 ya	D		1				10	12	Ø

- Enter the sequence digit in the editable textbox
- Click on the tick box to save the sequence, the tick changes to a pencil to signify the edit is successful

• Continue with the other patrol points in your patrol route sequence

## 4.7To allocate staff to a site

- Click on the Manage staff allocations button on the bottom left of the site manager
- The monthly site timesheet opens by default showing all the staff allocated to the site in the selected month

	NFC	: A	frio	ca	)								S	af	eG	ua	rd												<b>⊥</b> N			aela
onthly	Alloca	tio	n Tir	nes	heet	t > C	lient	: <b>H</b>	usk	ies >	> Sit	e : N	airc	bi S	ore																	
< Back	to Nairol	bi Sto	re																													
ugust Previous	Month	N	ext M	≎ onth	2014	1					Ŷ /	All Shit	ts				Ŷ	Sul	bmit											Add	Alloci	atio
Mon	thu Tim	ocho	ot																													
Edit Solo		esne	et																													
LUIL SEIC		xpor	t to Ex	xcel																												
Click on	one or n	xpor	t to Excells,	xcel then	click c	on "Ec	lit Sele	ected	" to e	dit th	ne spe	ecific s	hift.	To can	cel se	lectio	on, cli	ck th	e cell a	again												
Click on	one or n	xpor nore AUG	t to Ex cells, UST 20	then	click c	on "Ec	lit Sele	ected	" to e	dit th	ne spe	ecific s	hift.	To can	cel se	lectio	on, cli	ck th	e cell a	again												
Click on	one or n	AUG Fr	t to Ex cells, UST 20 Sa	then 114 Su	click o	on "Ec	lit Sele We	ected Th	" to e	dit th	ne spe Su	Mo	hift. Tu	To can We	cel se Th	electic Fr	on, cli Sa	ck th Su	e cell a	again Tu	We	Th	Fr	Sa	Su	Мо	Tu	We	Th	Fr	Sa	5
Click on Officer Name	one or n Staff ID	AUG Fr	t to Ex cells, UST 20 Sa 2	then 114 Su 3	click c Mo 4	Tu 5	We 6	Th	Fr 8	dit th Sa 9	Su	Mo 11	hift. Tu 12	To can We 13	cel se Th 14	Fr 15	Sa 16	ck th Su 17	e cell a Mo 18	again Tu 19	We 20	Th 21	Fr 22	Sa 23	Su 24	Mo 25	Tu 26	We 27	Th 28	Fr 29	Sa 30	2
Officer Name Gryth Jones	Staff ID 10012	AUG Fr 1	t to Ex cells, UST 20 Sa 2 D	then 114 Su 3	Mo 4 D	Tu 5 D	We 6 D	Th 7 D	Fr 8 D	sdit th Sa 9 D	Su 10	Mo 11 D	hift. Tu 12 D	To can We 13 D	cel se Th 14 D	Fr 15 D	Sa 16 D	Su 17	e cell a Mo 18 D	Tu 19 D	We 20 D	Th 21 D	Fr 22 D	Sa 23 D	Su 24	Mo 25 D	Tu 26 D	We 27 D	Th 28 D	Fr 29 D	Sa 30 D	3

Fig. 2.0 Monthly site timesheet

- You can select different parameters in the month and the year, click on the Submit button if you need to see the monthly view of the site in different period (or use previous/next month button)
- Click on Add Allocation to add a new staff allocation to the site, the new allocation form appears as shown below



Fig. 2.1 Staff allocation addition form

- Enter the *start date* and *end date* of the allocation to enter
- Select the off day(s). If allocating a reliever working on multiple sites, there may be many off days
- Select the staff member to do the allocation for
- Select the Shift applicable for the allocation
- Click on save to insert the allocation
- The new allocation is entered into the monthly timesheet for the period selected in the date range, confirm by reviewing the monthly calendar for the detailed months
- Click on the *Back to [Site Name]* link on the top left of the monthly timesheet view to navigate back to the site manager

## 4.8 Manual Site Scheduling

• If the site is a manual scheduled site, then activity is set up using the manual site scheduler (found below the Monthly Allocation Timesheet)

anual Site Sch	eduling : H	uskies > Site	e : Nairobi S	Store						
Site Patrol Order	s									
Add Patrol Order	Save Patrol Or	ders								
PATROL ORDER NAME	12AM	1AM	2AM	3AM	4AM	5AM	6AM	7AM	8AM	9AM
weekend PO	weeken 💲	weeken: 🛊	weeken 💲	weeken:	weeken 💲	weeken 💲	weeken 💲	weeken: \$	weeken 💲	weeken
weekday PO	weekda:	weekda <u>y</u> 🛊	weekday 🗘	weekda <u>v</u> 🖨	weekda <u>'</u> 🛊	weekda <u>y</u> 🛊	weekday \$	weekda <u>y</u> \$	weekda <u>:</u> 🛊	weekda

### Fig. 2.2 Manual Site Scheduling – site patrol orders

• A patrol order governs activity in one hour buckets over a 24-hour period

ve Schedule										
TAFF NAME	PAYROLL #	SHIFT CODE	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	DELETE
Kevin Smith	10013	N	weekday 🛊	weekday 🛊	weekday 🛊	weekday 🛊	weekday 🛊	None 💠	weeken 🛊	Delete Allocation
Grvth lones	10012	D	weekda:	weekda:	weekda: \$	weekda: \$	weekda: \$	weekda: \$	None 🜲	Delete Allocation

### Fig. 2.3 Manual Site Scheduling – staff patrol order scheduling

• This is where you allocate specific guards to specific patrol orders. By using combinations of patrol routes, patrol orders and guard allocations, you can achieve maximum flexibility of guard deployment

# 5.0 Master Setup

The Master Setup menu drop down allows you to access, view and edit the following;

- Manage Users
- Manage Shift Codes
- Manage Staff types
- Manage User Rights
- Notification Settings
- Manage Control Room Resolution
- Manage Report Settings

## 6.0 Client Manager Menu

The client menu drops down allows you to access, view and edit client and site information in an efficient way. The menu includes:

- Client Setup
- Client Manager
- Clients
- Contracts
- Sites
- Manage Report Settings

# 7.0 HR Manager

Under the HR Manager drop down there are four options:

- Staff; Enables you to access view and edit the staff types in the system
- Manage timesheets: you can view and edit timesheet allocation periods for individual guards. You can sort by client and site
- Terminate Staff
- Monthly timesheet: this view allows you to see a full roster of all staff by month and is fully filterable and sortable

# 8.0 Site Manager

Under the patrols drop down there is the following option:

- Site Manager; Enables you to view and edit the sites.
- Shifts Enables you to access, view and edit the shifts
- Patrol Points; Enables you to access, view and edit the patrol points

# 9.0 Reports

## 9.1 Attendance Report

This report gives details of the guards who have reported to work. If present it is represented by 1 and absent is denoted by 0

## 9.2 On-Shift On-Time Exceptions

This report details guards who fail to report on time at the beginning of their shift. Guards that do report on time are not captured in this report. The report is sortable by any field by simply clicking in the header of the relevant field.

## **9.3 Patrol Performance Exceptions**

This report details all the patrols missed or failed. The report is sortable by any field by simply clicking in the header of the relevant field.

## 9.4 Control Room Report

This report gives details of the following;

- Performance of the last 12 hours
- No of exceptions in the last 12 hours
- Unresolved exceptions in the last 12 hours
- Resolved exceptions in the last 12 hours

You can also filter the reports to select the desired client or site.

## 9.5 Control Room Analysis

This report gives you the diagrammatic representation of the performance of the guards in terms of charts

## 9.6 Live Patrol Performance Exceptions

This report is designed to be used in control centers or operations offices. The report opens in a new window or tab, and self-refreshes every 30 seconds until the window is closed. This report is critical in identifying potential problems or incidents and can assist in rapid response deployment. The report self-sorts and shows the most recent failures at the top of the list.

## 9.7 Patrol Percentage Exception Report

This report enables analysis of individual guard performance over specified time periods. The report measures patrol failures as a ratio against patrol successes. Organizations may wish to set performance thresholds for guards as part of a performance management system. This data will be useful in periodic reviews of guard performance.

## 9.8 Security Officer On-Shift Report

This report indicates the time that all guards (as opposed to only those guards who are late in the Exception Report – see 9.2) log on and report to site at the beginning of their shift.

## 9.9 Security Officer Daily Patrol Performance Report

This report indicates the performance of all guards by shift. It is sortable and filterable to allow detailed analysis.

## 9.10 7 Day Tag Performance Report

This report provides a rolling 7-day view of the percentage of successful patrol point tag events versus failed patrol point tag events.

## 9.11 30 Day Tag Performance Report

This report provides a rolling 30-day view of the percentage of successful patrol point tag events versus failed patrol point tag events

## 9.12 Timesheet vs Attendance Report

This report gives you the performance of a guard for 30 days, compares the failed vs successful patrols and gives the percentage performance of the guard.

## 9.13Live Patrol Route Report

This report uses a useful Red, Green graphical display to indicate patrol performance over the preceding 24-hour period. This report is particularly useful when communicating with clients.

## 9.14 Live Tag Compliance Report

This report uses a useful Red, Green graphical display to indicate patrol point tag performance over the preceding 24-hour period. This report is particularly useful when communicating with clients at a detailed level.

## 9.15 Patrol Route Compliance Report

This report provides a slightly different view to other patrol route reports. Shows failed no of patrols, pending and completed number of patrols and finally the percentage success, on a daily basis.

## **10.0 Message**

This option gives you the performance information of each and every security officer, in percentage, it also gives notifications if you have won an incentive (Clients who have a working incentive plan)

## **11.0 Incentives**

Under this option one can be able to manage incentives, view winners report and the credit reports

# **12.0 Settings**

## 12.1 Manage Users

This allows you to set up and administer web portal users on your sub domain.

## **12.2 Manage Branches**

This allows you to add, edit or delete branches under your sub domain.

## **12.3 Manage Shift Codes**

This allows you to add, edit or delete shift codes.

## **12.4 Manage Staff Types**

This allows you to set, edit or delete different staff types and names.

## **12.5 Manage Report Settings**

This allows you to add, edit or delete automated email report settings.