

Guard Patrol Manager Configuration and User Guide

9.4.0 v1

Symmetry™ Security Management

9600-0405

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**Guard Patrol Manager Configuration and User Guide
(9600-0405)**

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Applies to version 9.4.0 or later of the Symmetry Software, until superseded by a later issue of the manual.

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Preface

About this Installation and User Guide

This guide explains the following:

- The purpose, operating concepts and benefits of the Guard Patrol Manager.
- How to configure the software.
- How to use the software.

This guide is intended to be used by:

- Managers deciding whether to use the Guard Patrol Manager.
- Technical staff who need to configure the software.
- Users who need to understand how to operate the Guard Patrol Manager.

This document is supported by context-sensitive online help available from the Symmetry software.

Chapter 1: Introduction

About the Guard Patrol Manager

The Guard Patrol Manager is optional software for configuring, recording and reviewing guard patrols.

The module includes a complete set of tools for setting up and managing patrols entirely from Symmetry. It benefits from the ability to use access-control readers or monitor points as tour checkpoints, resulting in no need for specialist hardware or data-collection devices, and making the introduction of patrol management both cost effective and easy to implement.

Patrols can be set up to specify the sequence of checkpoints to visit and the time allowed for the guard to travel between them. Different patrol tours can be set up for different areas of the site. Randomized tours can also be configured to avoid predictability.

The progress of a patrol can be monitored from the Symmetry Activity screen, and previous patrols reviewed in reports. Symmetry can also display rule infringements in the Alarms screen, such as missed checkpoints or late arrival at a checkpoint.

Guard Patrol Manager License

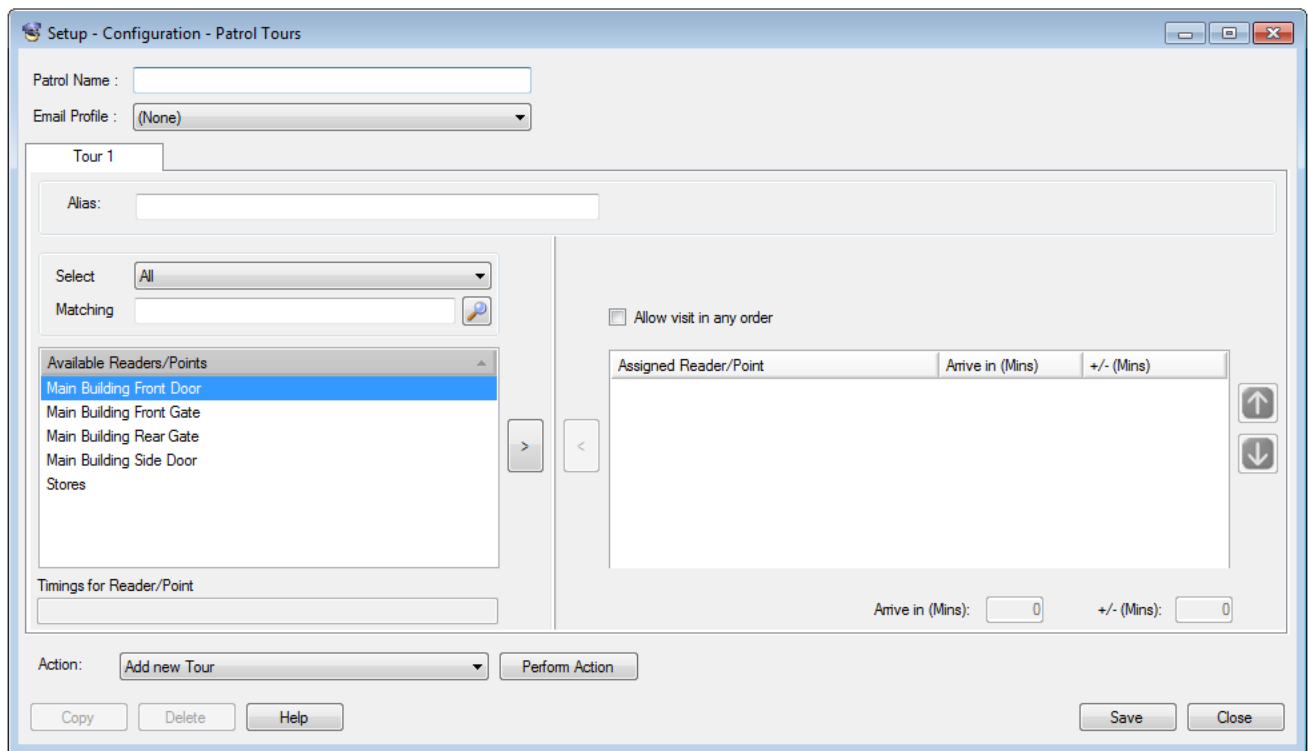
To activate the Symmetry Guard Patrol Manager software, install a Guard Patrol Manager license in the Symmetry "Maintenance/Licensing/System Licenses" screen.

To obtain the new options in the user interface, log out of Symmetry, then log back in.

Chapter 2: Setting Up and Running Patrol Tours

Setting Up Patrol Tours

You can set up patrol tours using the "Setup/Configuration/Patrol Tours" screen:



Each patrol tour specifies the sequence of checkpoints around the site and the time allowed for the guard to travel between them.

The checkpoints are either key-operated switches (monitor points) or card readers. The monitor points and readers available to include in the tour are listed in the **Available Readers/Ports** box on the left-hand side of the Patrol Tours screen. The monitor points and readers currently used as checkpoints in the tour are listed in the **Assigned Reader/Port** box on the right-hand side of the screen.

A monitor point or reader can be used in more than one patrol tour.

Setting Up a Standard (Non-Randomizable) Tour

Note: For further information about any option, please refer to the *Online Help*.

To set up a standard (non-random) tour:

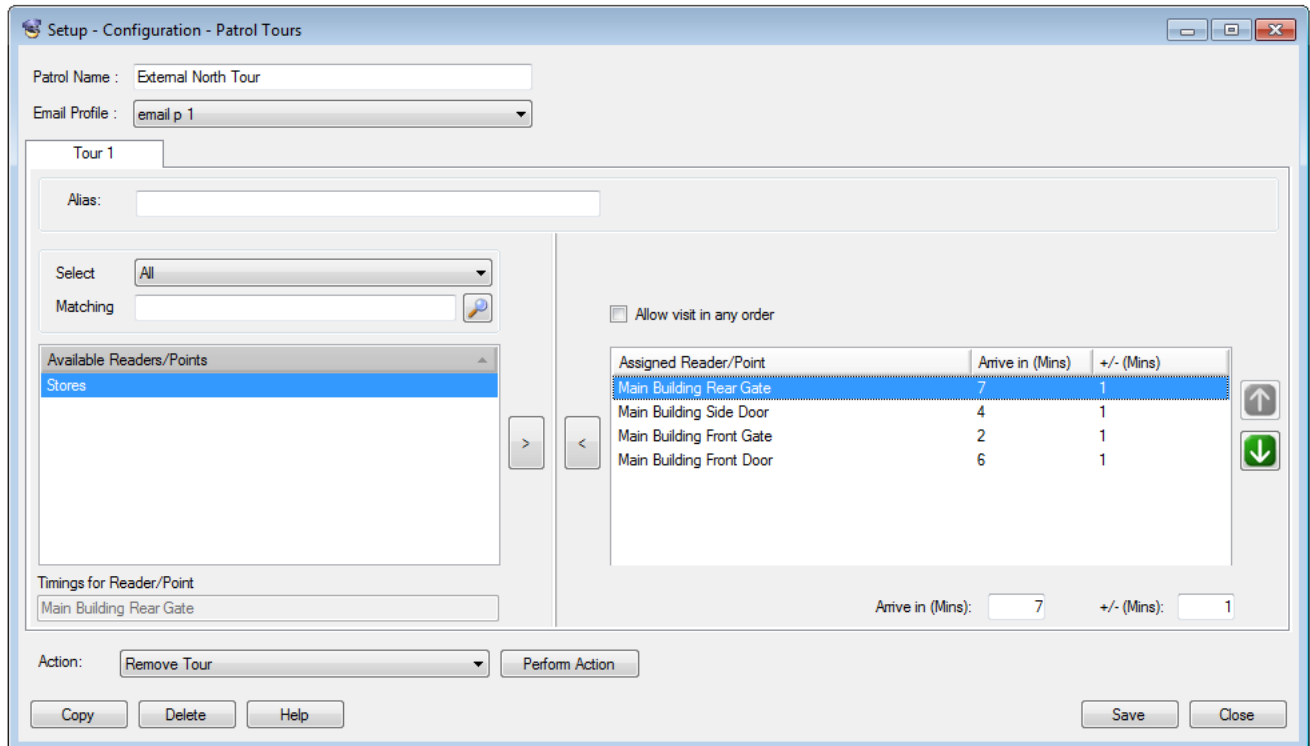
1. Create a new patrol tour from the "Setup/Configuration/Patrol Tours" Selection screen.
2. Specify a **Patrol Name**.
3. If you want to generate an email when the tour starts, specify the **Email Profile**. The email will show details of the tour, including the checkpoints to visit and their order.
4. In the **Available Readers/Points** box, select the readers and/or monitor points to include in the tour and move them to the **Assigned Reader/Point** box using the ">" button.
5. If you want to allow the checkpoints to be visited in any order, select **Allow visit in any order**, and:
 - If you want the tour to start from the same checkpoint every time, move the checkpoint to the top of the list and select **Use mandatory start point**. The checkpoint is highlighted in green.
 - If you want the tour to finish at the same checkpoint every time, move the checkpoint to the end of the list and select **Use mandatory finish point**. The checkpoint is highlighted in red.
 - If you want to set a maximum time between checkpoints, select **Enable Maximum Time Allowed**, and specify the number of minutes.

For example:

The screenshot shows the 'Setup - Configuration - Patrol Tours' window. The 'Patrol Name' is 'External North Tour' and the 'Email Profile' is 'email p 1'. The 'Tour 1' tab is active. The 'Alias' field is empty. The 'Select' dropdown is set to 'All'. The 'Available Readers/Points' list contains 'Stores'. The 'Assigned Reader/Point' list contains 'Main Building Rear Gate' (highlighted in green), 'Main Building Side Door', 'Main Building Front Gate' (highlighted in blue), and 'Main Building Front Door'. The 'Allow visit in any order' checkbox is checked. The 'Enable Maximum Time Allowed' checkbox is unchecked, with a value of '0 (Minutes)'. The 'Use mandatory start point' checkbox is checked, and the 'Use mandatory finish point' checkbox is unchecked. The 'Action' dropdown is set to 'Remove Tour'. The 'Perform Action' button is visible. At the bottom, there are 'Copy', 'Delete', 'Help', 'Save', and 'Close' buttons.

6. If you want to checkpoints to be visited in a specific order, deselect **Allow visit in any order**, and:
 - In the **Assigned Reader/Point** box, position the checkpoints in the correct sequence (first checkpoint to visit at the top of the list).
 - Use **Arrive in (Mins)** to specify the nominal length of time the guard has to travel to the checkpoint from the previous checkpoint (or from the start of the tour if it is the first checkpoint in the tour).
 - Use **+/- (Mins)** to specify the tolerance for **Arrive in (Mins)**.

For example:



Setting Up a Randomizable Tour

The Patrol Tours screen allows you to set up different versions of the same tour (for example, to visit the checkpoints in different sequences). Each version is displayed in its own tab in the Patrol Tours screen (labeled "Tour 1", "Tour 2", etc.). When the patrol tour starts, Symmetry chooses at random any one of the different versions. This gives some unpredictability to the sequence of checkpoints visited during a tour.

To set up a randomized tour:

1. Create a new patrol tour from the "Setup/Configuration/Patrol Tours" Selection screen.
2. Specify a **Patrol Name**.
3. If you want to generate an email when the tour starts, specify the **Email Profile**. The email will show details of the tour, including the checkpoints to visit and their order.
4. Set up the first version of the tour in the normal way as for a standard (non-randomized) tour. Make sure you specify an **Alias** name.
5. Choose one of the **Add** or **Duplicate** options from the **Action** menu (bottom-left) and click **Perform Action**. A new "Tour" tab appears (e.g. "Tour 2").
6. In the new Tour tab, set up the new version of the tour in the normal way, as described in the previous section.
7. Repeat steps 5 and 6 for as many versions of the tour as you require.

The following shows an example:

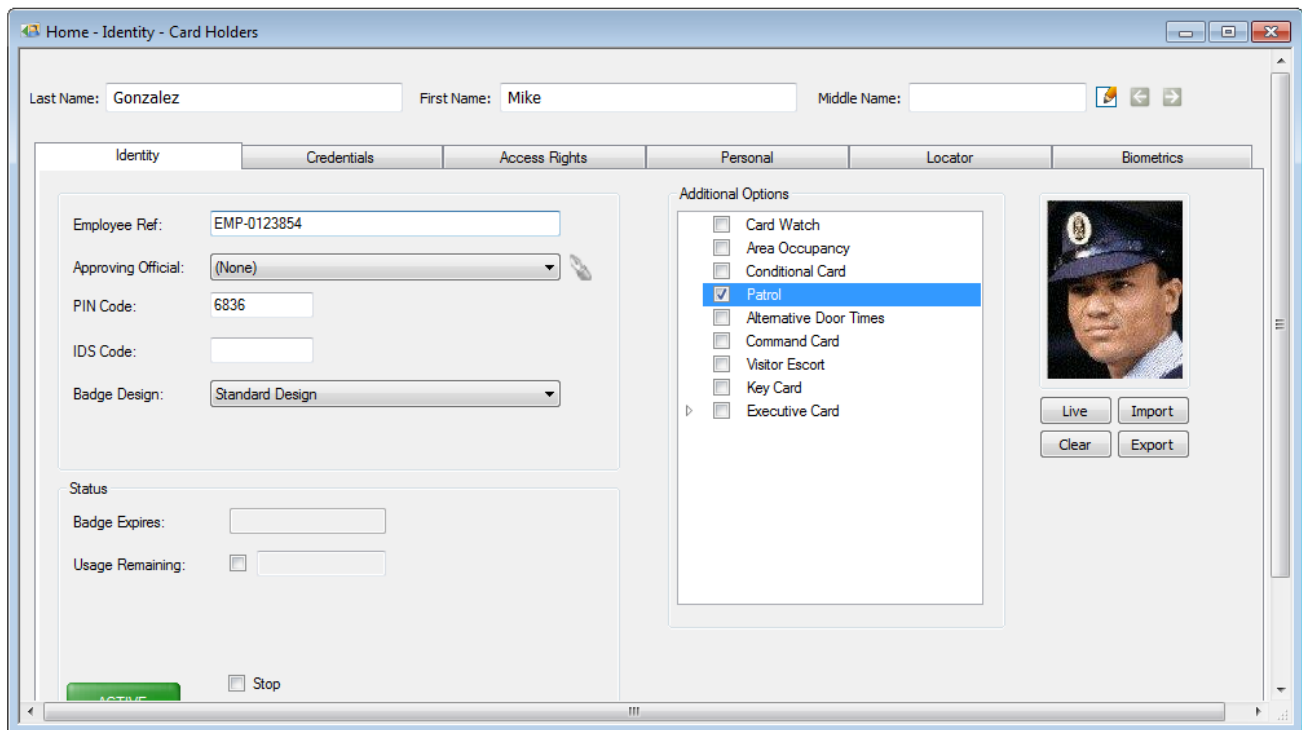
The screenshot shows the 'Setup - Configuration - Patrol Tours' window. The 'Patrol Name' is 'External North Tour' and the 'Email Profile' is 'email p 1'. There are two tabs: 'Tour 1' and 'Tour 2'. The 'Alias' is 'External North Tour - Route A'. The 'Select' dropdown is set to 'All'. The 'Available Readers/Points' list includes 'Stores'. The 'Assigned Reader/Point' table is as follows:

Assigned Reader/Point	Arrive in (Mins)	+/- (Mins)
Main Building Rear Gate	5	0
Main Building Side Door	4	0
Main Building Front Gate	7	0
Main Building Front Door	3	0

The 'Timings for Reader/Point' section shows 'Main Building Side Door' with 'Arrive in (Mins): 4' and '+/- (Mins): 0'. The 'Action' dropdown is set to 'Add new Tour'. There are buttons for 'Copy', 'Delete', 'Help', 'Perform Action', 'Save', and 'Close'.

Selecting the "Patrol" Privilege for Guards

You must select the **Patrol** option in the Card Holders Definition screen for each guard required to perform a patrol tour transaction at a reader or monitor point:



The screenshot shows a web application window titled "Home - Identity - Card Holders". At the top, there are input fields for "Last Name: Gonzalez", "First Name: Mike", and "Middle Name:". Below this is a tabbed interface with tabs for "Identity", "Credentials", "Access Rights", "Personal", "Locator", and "Biometrics". The "Identity" tab is active, showing fields for "Employee Ref: EMP-0123854", "Approving Official: (None)", "PIN Code: 6836", "IDS Code:", and "Badge Design: Standard Design". To the right, the "Additional Options" section contains a list of checkboxes: "Card Watch", "Area Occupancy", "Conditional Card", "Patrol" (checked), "Alternative Door Times", "Command Card", "Visitor Escort", "Key Card", and "Executive Card". Below this list is a photo of a man in a uniform and buttons for "Live", "Import", "Clear", and "Export". At the bottom left, there is a "Status" section with "Badge Expires:" and "Usage Remaining:" fields, and a "Stop" checkbox.

When you start a patrol tour, you must select the name of the card holder (guard) who is going to conduct the patrol tour, and Symmetry lists only those card holders who have the **Patrol** privilege.

Note: You must also use the Access Rights tab to give the card holder access rights to any readers used as checkpoints.

Any valid access-control, card command or card-conditional transaction is accepted as a patrol tour transaction. A transaction need not unlock a door.

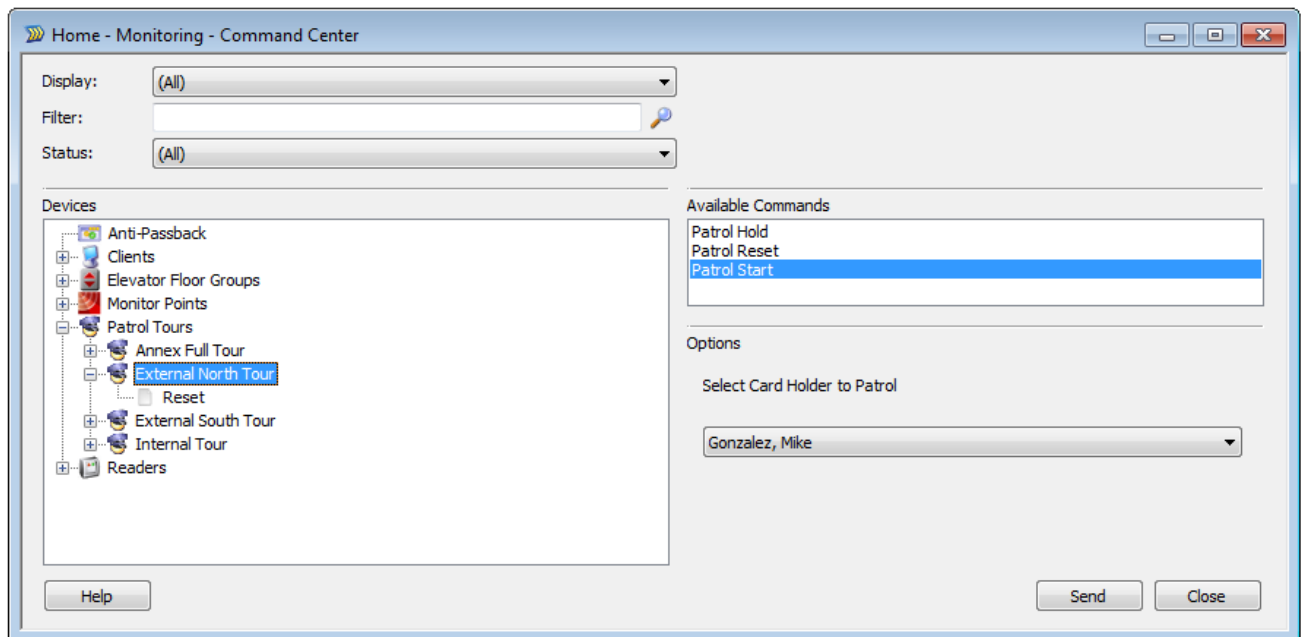
Running Patrol Tours

Starting a Patrol Tour

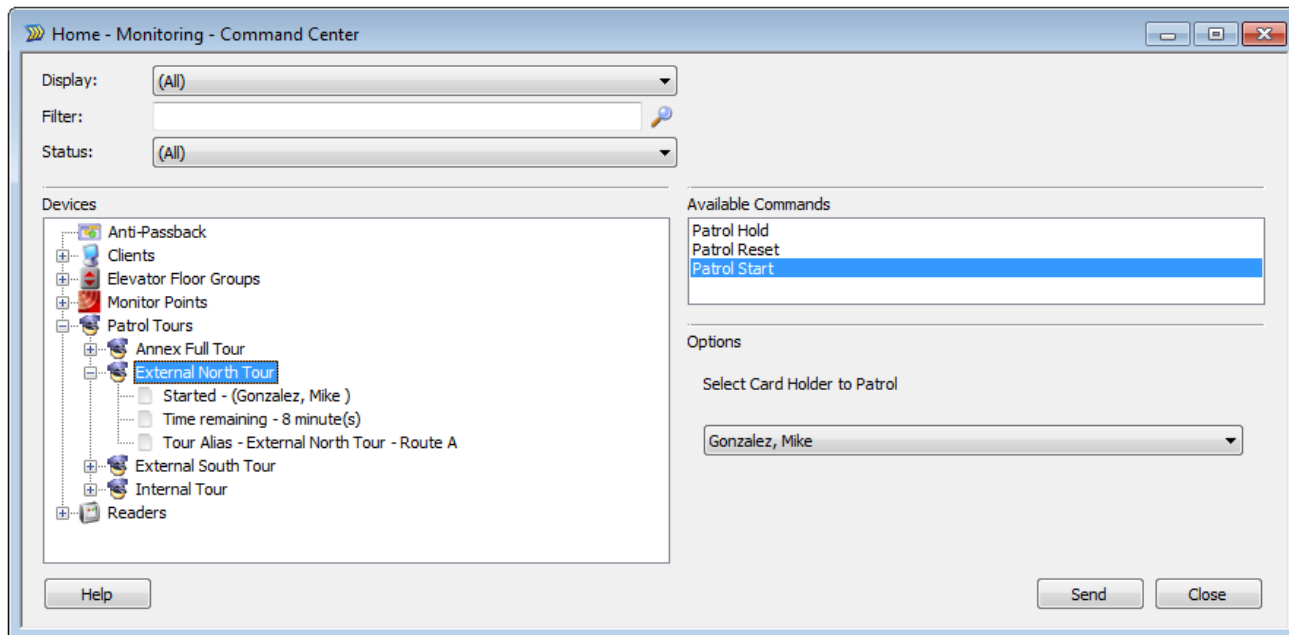
Note: You cannot start a tour if it uses a monitor point that is in another tour that has started. This is to ensure that monitor point activation is attributed to the correct tour. This restriction does not apply to readers, since a transaction at a reader can be attributed to a card holder and hence tour.

When a guard is ready to start a patrol tour:

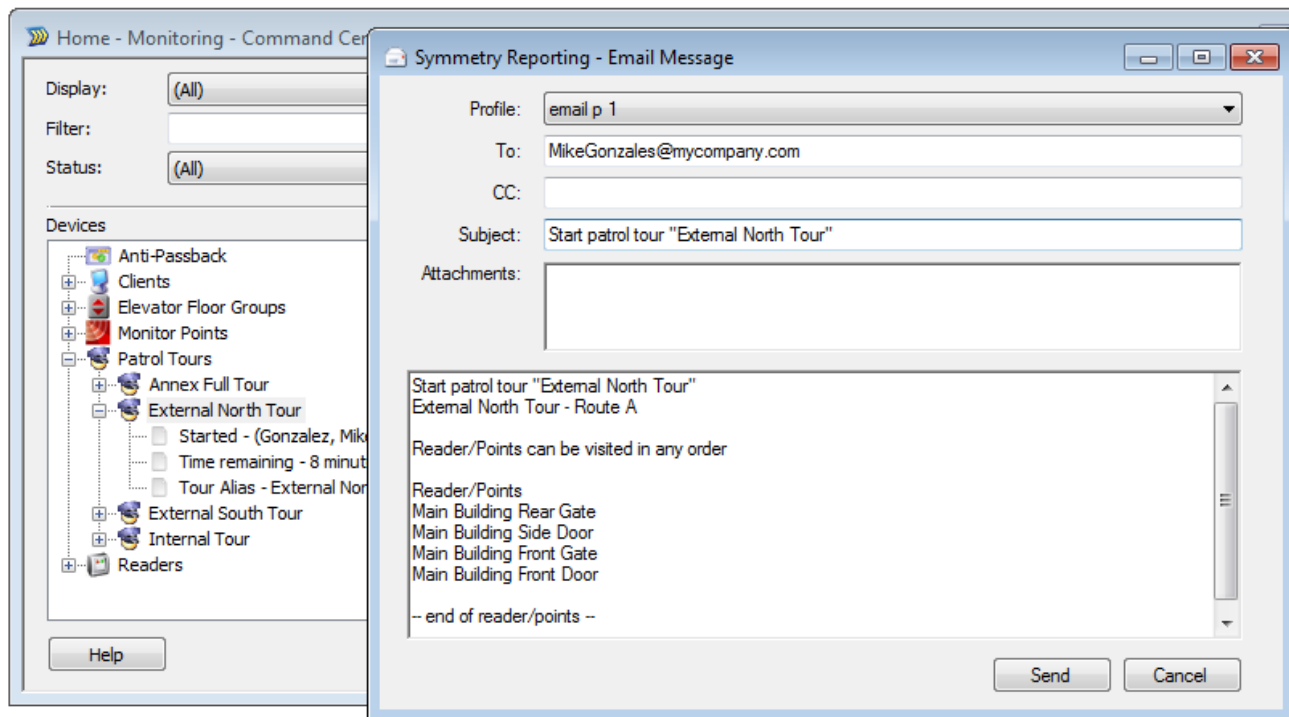
1. Open the "Home/Monitoring/Command Center" screen.
2. Select the patrol tour.
3. Select the name of the guard. You need to do this, as there can be several patrol tours running at the same time (providing there are no common checkpoints).
4. Send the **Patrol Start** command



- If the tour has been set up as randomizable, Symmetry chooses at random the version of the tour to run and displays its alias name in the tree. Also displayed in the tree is the maximum time remaining for the tour to complete (if a maximum time has been configured for the tour). The following shows an example.



- If you have set up the tour to send an email, details of the email message are displayed (including the checkpoints to visit and their order). You can change the **To** email address if you wish. Click **Send** to send the email, or **Cancel** if you do not want the email to be sent (this will not stop the tour).



Viewing the Progress of a Patrol Tour

Once you have started a patrol tour, you can monitor its progress from the "Home/Monitoring/Activity" screen. Several alarms/events can be generated during the patrol, including:

- **Successful Clock at Point** – Guard arrived at checkpoint as scheduled.
- **Arrived too Early at Point** – Guard arrived too early at checkpoint.
- **Overdue at Point** – Guard did not arrive at checkpoint within the time allowed.
- **Out of Sequence at Point** – Guard missed checkpoint.
- **Patrol Tour Complete** – Guard completed tour.

Completing a Patrol Tour

When the patrol tour is complete, you need to select the patrol tour in the "Home/Monitoring/Command Center" screen, and send the **Patrol Reset** command. This acknowledges that you have been monitoring the patrol and have seen that the patrol was completed.

If necessary, you can send the **Patrol Reset** command at any time to abandon a patrol. You can also send a **Patrol Hold** command to put a tour on hold; the tour resumes automatically when the guard uses the next checkpoint.

Viewing History Reports

You can use the "Reports/History/Activity" screen to view the details of previous patrols, including any rule infringements. Select **Patrol Operations** in the **System Activity** options:

The screenshot displays the 'Reports - History - Activity Selection' interface. At the top, there are options for 'Company' (By Company Group or Or By Company) and 'Date and Time' (Start Date, End Date, Time, Filter Each Day to include). Below this, there are 'Include' dropdowns for Readers, Cameras, and Monitor Points. A yellow callout box highlights the 'Filter By' dropdown menu, which is set to 'Card Number' with the value '23671' entered. The 'Filter Each Day to include' section shows a tree view of activity types, with 'Patrol Operations' selected under 'System Activity'.

You can report on the tours made by a specific guard by selecting **Card Number** in the **Filter By** menu, and entering the card number of the guard.