

Introduction

Welcome to the Guardian Mobile Monitoring system. This guide is intended to lead a new dealer through first exposure to both the dealer portal and an end user commercial portal. The goal of this guide is to provide dealers with hands-on experience in creating a new subscriber, registering a beacon to the new subscriber, logging into the subscriber portal, and performing the initial configuration of the beacon. This is not a comprehensive guide to understanding the Guardian system – complete online help systems are available from within each portal. This guide provides a walk-through of the system with enough detail to get the dealer up and running.

It is not an absolute requirement that the beacon be physically installed in the vehicle before proceeding with this guide, but having a properly installed beacon in place is helpful in that it will allow you to see immediate results from the steps in this tutorial. The steps in this tutorial will also be critical in testing that your beacon is installed properly.

Understanding Portals and Logging In

You should have already been provided with three pieces of information, either directly by Guardian or by your monitoring station. These three pieces of information are:

- Username
- Password
- Portal URL (of the format `http://dealersname.guardian-mms.com:8010`)

These three pieces of login information will enable you to log into your dealer portal. In your web browser, access your dealer portal URL. The initial screen will ask you for your username and password. Enter the username and password provided to you and you will be logged into your dealer portal. The dealer portal is your interface for all administrative tasks that are involved in managing your Mobile Monitoring subscriber base. This primarily includes creating new subscriber accounts, managing existing accounts, and registering beacons to accounts.

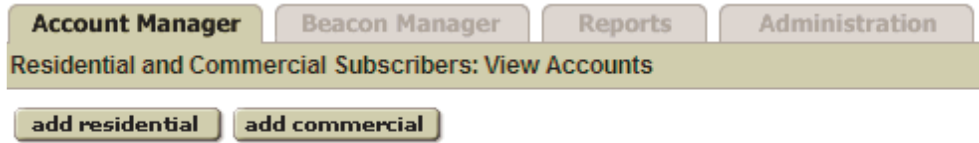
The dealer portal is only accessed by you as a dealer. Subscribers, commercial or residential, would never log into a dealer portal. Subscribers have their own portals which have slightly different URLs from dealer portal URL listed above.

- Residential Subscribers: `http://dealersname.guardian-mms.com:8011`
- Commercial Subscribers: `http://dealersname.guardian-mms.com:8012`

You will see in later sections that when you create a new subscriber, you simultaneously create a username and password for the subscriber. That username and password combined with the appropriate subscriber portal URL above constitute the three pieces of information that a subscriber will require to log in.

Creating a Subscriber

After logging into your dealer portal, you will see a series of tabs across the top of the screen. Click on the “Account Manager” tab. This screen will provide you with a listing of all of your existing accounts as well as providing links to create new accounts.




Before creating a new account, you should be certain of whether you want to create a residential account or a commercial account. This choice cannot be reversed later.

Using a commercial account as an example, you would click on the “Add Commercial” button to create a new commercial subscriber. To create a new account, fill in all of the required fields (required fields are those marked with a red “*”). Most of the fields are self-explanatory, however several field require explanation:

- **CS#** - this is an abbreviation for “Customer Site Number” which is a free-form field that you can (optionally) use to correlate accounts within the Guardian system to some account number that you may already use in your accounting or CRM system. This is a free-form field – you can use it to create any identifier you see fit.
- **Account Name** – this is the display name that will identify the account in the Account Manager.
- **Primary Admin Login Name / Password** – this is the initial login account information that you are creating for the subscriber. This login name and password along with the subscriber portal URL described earlier are the three pieces of information that the subscriber requires to log in.
- **Passcode** – this is the same thing as an alarm passcode or codeword. It is used by the subscriber to identify him or herself to a monitoring station operator over the phone.

Once you have all the required information filled in, click the “save” button to create the account. This will return you to the account list screen where you will see your newly created account listed.

	Downtown Delivery	(301) 555-2121	0	0	Lab Testing	[Manage]	[View Beacons]	[Register Beacon]
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Note: Creating a subscriber account is only done once per subscriber irrespective of how many beacons the subscriber purchases. For example, if you sell 10 beacons to a subscriber, you still only create the account once.

Registering a Beacon to a Subscriber

Before the subscriber will be able to make use of their new beacon, our system needs to know which beacon you as a dealer have installed in the subscriber’s vehicle. In the Guardian system, the process of defining which subscribers have which beacons is known as “registering” a beacon to a subscriber.

If you click on the “Beacon Manager” tab in your dealer portal, you will see a list of all of the beacons that Guardian has provisioned to you as a dealer. The last column on the right indicates whether the beacon has been registered to a subscriber or if it is unregistered (meaning it’s likely either in your inventory or being shipped to you). To register a beacon to a subscriber, click on the “Account

Manager” tab at the top of the dealer portal. Locate the account to which you wish to assign the beacon and then click the “register beacon” link to the right of the appropriate account name. Clicking this link will provide you with a drop-down list of all the unregistered beacons currently provisioned to your dealer portal. Choose the beacon you wish to register to the subscriber account from the list.

You also have to select whether or not the beacon will be allowed to notify the monitoring station of events. For any individual beacon you can select whether the beacon will be permitted to send incidents to a monitoring station (for a monitored solution) or not (for an unmonitored or self-monitored solution).

Lastly, you will need to assign a billing plan to the beacon. The billing plan is based on how much data is going to be communicated between the beacon and the Guardian servers. This is most significantly impacted by the frequency of scheduled tracking scenarios that your subscriber configures the beacon to follow. If the subscriber is content with a 15 minute tracking interval combined with other typical beacon usage, you can select the lowest volume plan. If your subscriber is going to require frequent scheduled tracking (every five minute or more frequent), a higher volume or unlimited usage plan may be most appropriate.

Register Beacon

Fields marked with * are required.

Organization: Downtown Delivery
Beacon ID: 010110830514274
Beacon Nickname: beacon1
Beacon Can Notify Monitoring Station?: Yes No

Service Plan:*

Trial US - GPRS 1MB - USD\$0/month
Trial plan for US GPRS subscribers, includes 1MB

Beacon Registration:
Note that monthly service fees will start as soon as this beacon is registered to the subscriber.

Only data that is transferred between the beacon device and the Guardian system is counted towards your billing plan allotment. Logging into the system with your web browser and viewing reports does not count towards your data allotment – data transfer between the Guardian system and the web browser is unlimited.

Once you have selected a billing plan, you can click the “add” button to register the beacon to the subscriber account.

Completing the Subscriber Setup

Creating the subscriber account and registering a beacon are the two main functions of the dealer portal and are all that is required to get the new subscriber up and running. All beacons usage – tracking, reports, etc – is performed from within the subscriber portals.

Accessing Subscriber Portals

There are two ways to access the subscriber portals. You can access the portal by browsing to the subscriber portal URL and entering a valid subscriber username and password, which is the same way the end user would access the system. The other way to access the subscriber portal is from the dealer portal. Under “Account Manager”, all subscriber accounts are listed. To the right of each account name is a “Manage” link. Clicking on this link will give you the choice to either enter the subscriber’s passcode, or to enter an override justification. An override justification is some descriptive text to justify accessing the subscriber’s portal since the override method allows you to circumvent the need for a username and password. This is a freeform field – the system does not validate your justification.

AUTHENTICATION REQUIRED

Authentication is required to access Downtown Delivery's Portal.
Note: Fields marked with a * are required.

Authentication:
If you have an approved Contact on the phone, select the Contact's name and enter their passcode for authentication.

Contact: Passcode:

Operator Override:
If you do not have the Subscriber or Contact's Passcode, you may access their Portal by entering operator override comments and pressing the Override button below.

Operator Comments:

Override should only be used in the case of an emergency, or if you have explicit permission from the account holder or Contact.

Note: All access to the Subscriber's account is audited and is available to the subscriber.

Using this override feature will launch you into the subscriber portal and will also log the override justification in the user’s “login summary” report. This logging feature provides an audit trail that allows the subscriber to see who has been accessing their portal and why.

Subscriber Portal Configuration

The first step in performing subscriber portal configuration is to assign the subscriber’s beacon to a mobile item (vehicle, asset, personnel) within their portal. All configuration, tracking, and reporting within the subscriber portal references mobile item names, not beacon names. If you look down the

right hand side of the commercial subscriber home page, there is a box titled “New Beacons”. This box will appear any time you as a dealer register a new beacon to the subscriber portal. Click on the link within the “New Beacons” box that says “Click here to set them up”.

The beacon setup screen will list all beacons that are currently not assigned to a mobile item. For each beacon, you can choose to perform a quick setup or complete setup. Complete setup will ask you for detailed mobile item information, but for the purpose of this guide just choose quick setup. The quick setup will ask you to define what type of mobile item you’re creating and to give it a name. Once you define this information and click “Save”, the system will create the appropriate mobile item with the name you defined and assign the beacon to that mobile item. This is the minimum configuration necessary to begin using the beacon.

With only this configuration, the GPS beacon device does not report back any information on its own. It will respond to live tracking requests made through the appropriate mobile items section of the website (vehicles, assets, or personnel) but it will not proactively report any data. To configure the beacon to report data back to our server on a scheduled basis, you must configure scenarios. A scenario is a collection of three data elements – an event, a schedule, and a notification.

- Events are occurrences that trigger the beacon to report. Examples of events are:
 - Ignition on / off
 - Vehicle start / stop
 - Interval tracking
 - Speed violations
 - Zone (geofence) violations
 - Panic button
 - Auxiliary input
- Schedules determine when a scenario is active
- Notifications are who will be notified when an event occurs, and how

Events

To define a scenario, choose the “Administration” tab from the top of the screen, then choose the “Events” tab from the scenario configuration window. To add an event, click the “Add Event” button.

Add New Event

Fields marked with * are required.

Beacon Model Type:	<input type="text" value="GGE-7125"/> *
Event Type:	<input type="radio"/> Auxiliary Input <input checked="" type="radio"/> Ignition sense <input type="radio"/> Panic button <input type="radio"/> Speed monitoring <input type="radio"/> Tracking with interval <input type="radio"/> Vehicle start & stop <input type="radio"/> Zone monitoring - Rectangle *
Name:	<input type="text"/> *
Description:	<input type="text"/>

Different events have different degrees of configurability, but all events require at least a name (some events require additional parameters as explained on-screen). Choosing the event you are configuring from the event list will alter the “Add Event” screen to present you with the appropriate options for the chosen event. Once you have completed all required fields (as marked with a red “*”), click the “Save” button to add the event. You can repeat this process to create other types of events – at a minimum, you should create an ignition on / off event, a vehicle start / stop event, and a tracking with interval event (a 15 minute tracking interval is recommended).

Schedules

Next, click on the schedules tab. Schedules define when the scenario is going to be active. Click on the “Add Schedule” button and you will see that there are three available schedule types:

- All of the time
- One time
- Recurring

“All of the time” is the most common type of schedule. Scenarios on “All of the time” schedules are always active. Alternatively, a one time schedule or recurring schedule can be defined to provide much more precise scenario scheduling.

Note: Tracking with Interval scenarios are suspended when the vehicle’s ignition is turned off. This is to avoid wasted data usage by repeatedly reporting the same point.

One time schedules are designed to activate a scenario at some future point in time, let it run for a designated timeframe, and then deactivate the scenario. Recurring schedules are like one time schedules but recur at regular intervals rather than terminating after a single occurrence. Both one-time and recurring schedules allow you to select particular day and time ranges to activate the scenarios.

To create a schedule, click the “Add Schedule” button (if you haven’t already) and choose the type of schedule you wish to create. To start with, the easiest schedule to create is an “All of the time” schedule since there is no configuration to be done other than defining the schedule name. If you want to create a more precise schedule, you can select the “Recurring” schedule option which will populate the screen with all of the different time and day options you can select from. Once you have defined your schedule, click the “Add” button to add the schedule to the system.

Notifications

The last component necessary to build a scenario is the notification. There are two sections to the notifications tab – “Notification Methods” and “Notification Groups”. You can switch between the two sections using the links in the upper right of the Notifications window. Notification methods are individual means of notifying someone of an event. Supported methods include email messages and SMS (Text) messages to a wireless device. For monitored solutions, “Monitoring Station” is also a supported notification method. To define a notification method, click the “Add Notification Method” button.

Add New Notification Method

Fields marked with * are required.

Notification type: Email SMS

Notification source: Existing Contact Enter as new

Select from contact list:
(or enter directly below)

Email Message To: *

Additional Message:

Notification method name: *

Notification method description:

You can see in the above example that we are defining an email notification method, defining the email address for “John Smith”. This notification method would now be available to be added to a notification group for assignment to a scenario.

Notification Groups are collections of Notification methods. This allows you to create a scenario that, if triggered, could notify a selection of people both via SMS and email. When building scenarios, only notification groups can be added to a scenario (not a method) so even if you only want to notify a single person of an event, you still have to create a group with a single entry. To create a notification group, ensure that “Notification Groups” is selected in the upper right of the screen and then click the “Add Notification Group” button. You need to give the group a name, then select the check boxes at the bottom of the screen for the methods you wish to add to the group.

Add New Notification Group

[Notification Methods](#) | [Notification Groups](#)

Fields marked with * are required.

cancel

add

Note: You can add new notification methods (ie. email, sms, monitoring station) by navigating to the Notification Methods link above. Once added, these will appear as checkboxes below.

Notification group name: *

Notification group description:

Available Emails

- Email John Smith
- Email Leslie Thomas

Available SMS

- 13105550911 (SMS John Smith)
- 16041112222 (SMS Jack Jones)

Monitoring Station

- Monitoring Station

cancel

add

Notifications are optional when building scenarios. In most cases, you won't want to be notified when an event triggers (interval tracking, start/stop, ignition sense, etc.) but rather you just want this data

stored to the database for reporting. If this is the case, you don't need to create any notifications. Notifications are more useful if you are setting up a panic button scenario, a zone (geofence) scenario, or a speed violation scenario.

Scenarios

Finally, once you have your events, schedules, and notifications defined you can group the components together into scenarios. To create a scenario, click the "Scenarios" tab and click the "Add Scenario" button. You need to enter a name for the scenario and then from the dropdown lists select an event, a schedule, and a notification. If you don't want to associate a notification with this scenario, choose "Store for review" as the notification. Click "Add" to save the scenario.

Once the scenario is saved, you will be prompted to assign the scenario to one or more beacons. Click on the link that tells you to click "here" to assign your scenario. This will give you a list of all beacons that are available to have that scenario assigned. Click the checkbox next to the beacons to which you want to assign the new scenario and click the "Assign Items" button. This will move the beacons from the "Available to be assigned" section to the "Assigned" section. You can now click the "Done" button to return to the scenario window. Repeat the scenario creation and assignment process for the remaining scenarios that you wish to create.

Tracking Your Vehicles

There are two ways you can track your vehicles. One is by configuring the beacon to report its location periodically (using the scenarios described earlier). The other is by using the subscriber portal to request a current location of the vehicle.

To request a current location of your vehicle, click the "Vehicles" tab at the top of the screen. This gives you a list of all the vehicles you have configured in your portal. To the right of each vehicle in the list is a "Locate / Track" link. These are actually two separate links, one for "Locate" and one for "Track". Locate will request a single current location of the vehicle and plot the current location on a map. Track will put the vehicle into a continuous tracking mode and will update the map every 15-20 seconds with a new location, plotting the breadcrumb trail of the vehicle on the map. The tracking session will run for up to 5 minutes then prompt you to cancel or continue.

The Locate / Track features make use of pop-up windows to plot the new points on a map. If your system has pop-up blocker software installed, you'll have to configure the software to allow pop-ups from your portal URL.

Reporting

The system provides a number of reports that enable you to view the activities of your vehicles through historical reporting. All data points that are communicated to our server (scenario points or from live locates / tracking) are stored in the database and can be reported on. To view reports, click on the "Reports" tab at the top of the subscriber portal screen.

Some reports require the existence of certain scenarios in order to work:

Report	Requires
Stop Report	Stop / Start scenario
Landmark Summary	Stop / Start scenario
Mileage Summary	None
State-by-State Mileage Summary	Interval tracking scenario (more frequent intervals improve the accuracy of this report)
Machine Hours Report	Ignition Sense scenario
Route Log	None

All reports have configurable date and time ranges. To view a report, click on the report you want to see then select the vehicle(s) you're interested in, the timeframe, and any other parameters applicable to the report then choose "Go!". The report will appear on screen, and you also have the option to export the report by choosing the "Export" option in the upper right of the results screen.

Note: Not all report types allow for reporting on multiple vehicles within a single report.

Fleet View

Fleet view offers the ability to view multiple vehicles on a single map. To access fleet view, click the "Home" link in the upper right. This will return you to the portal home page where you will see "Find with Fleet View" in the middle of the screen. The "Find with Fleet View" box lists all the vehicles you have configured in your portal. You can select up to 25 vehicles from the list (hold down the CTRL key and click with your mouse to make multiple selections) and click "Show Selected" to bring the selected vehicles up on a map. This will launch a pop-up window that will display the last known locations of your selected vehicles. Launching fleet view does not automatically request a new current location from the beacons – it relies on scenario based points coming into the system automatically. As new points come in from the vehicles, fleet view refreshes (every minute) to ensure it is always displaying the most recent possible data.

There are a number of dispatching options down the left side of fleet view. You can show vehicles that are closest to a particular address or landmark (if you have defined any landmarks in the "Administration" section), stops for the day, or most recent location. The fleet view map is also resizable, so you can resize the window to show a larger area or to accommodate multiple simultaneous fleet view windows (to keep track of different fleets within the same organization, for example). You can hover your mouse pointer over any vehicle point on the map to get address, time, and speed information for the specific vehicle.

Moving Forward

At this point you should have enough hands-on expertise with dealer and subscriber portals to begin experimenting with the system and testing out the various reports, scenarios, and other features. Using the system on a daily basis to manage your own fleet of vehicles is the best way to familiarize yourself with the system and to figure out how to best position the product to your customers.