EasyTour
User's Manual

GUARD1/easytour

Contents

Introduction

EasyTour is a simple, easy-to-use software companion to THE PIPE. With EasyTour, you can manage checkpoints, define routes for your patrols, and create tour reports showing where your officers have been.

Terminology

This manual uses a number of terms, which have a special meaning in the EasyTour program:

- *THE PIPE* is the data recorder your officers will carry. As used in this manual, this can refer to one of several models offered by TimeKeeping Systems, including THE PIPE, PIPE II, and STUBBY PIPE.
- *Checkpoints* are the touch memory buttons read by THE PIPE. Checkpoints can represent officers, locations, or observations, or checkpoints can be undefined.
- *Officers* use The PIPE to read checkpoints and perform tours.
- *Locations* are places where checkpoints have been installed.
- *Observations* are additional information that can be recorded and associated with locations.
- A *route* is a collection of locations to be visited.
- A *tour* represents a visit to the locations in a route and reading the related location checkpoints.
- *Missed locations* are locations included in a route that were not visited during a tour.
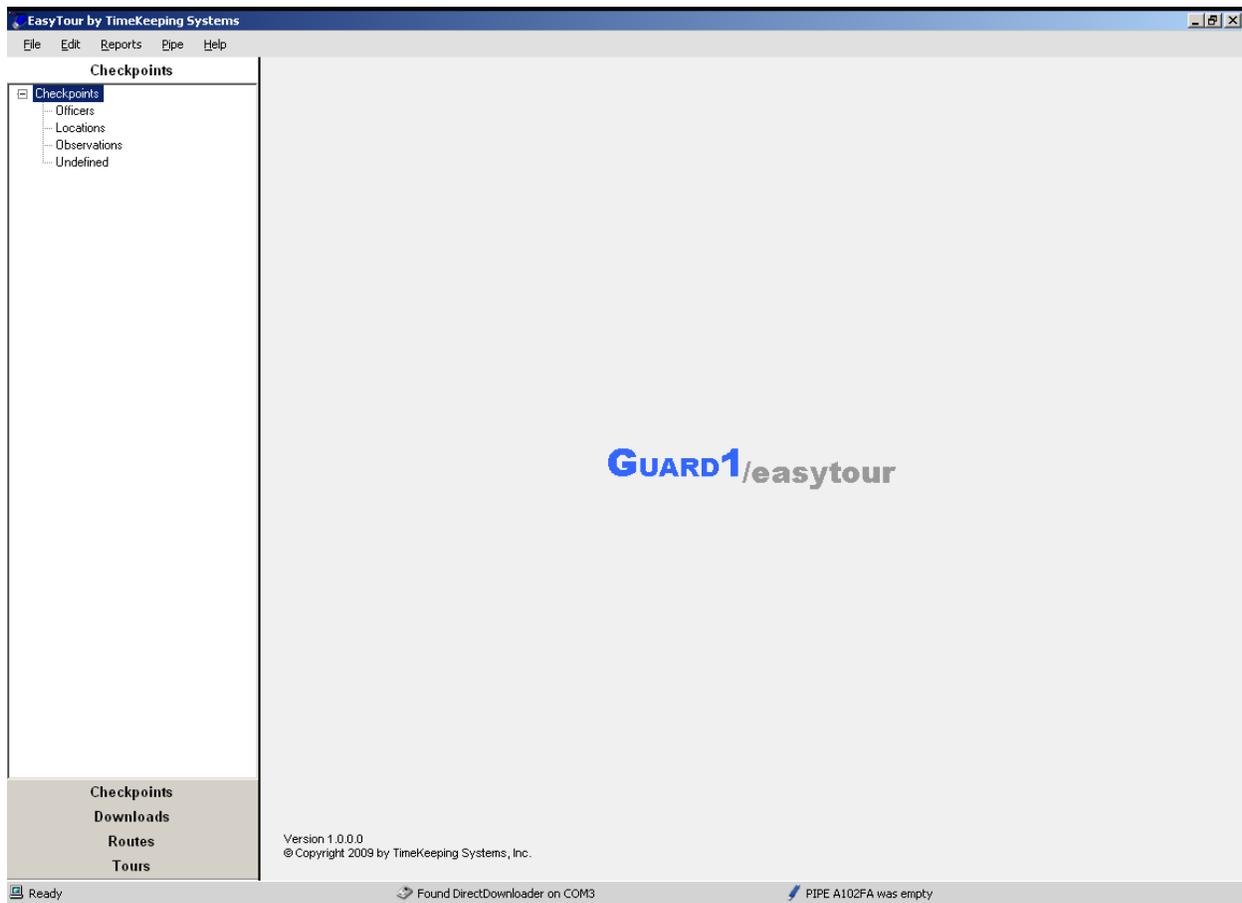
EasyTour Program

Here are the parts of the EasyTour program:

- The *status bar* appears at the bottom of the window and displays information about: 1) the program, 2) the downloader and 3) the pipe.
- The *navigation panel* at the left side of the window contains trees that allow you do navigate through the data in the EasyTour program.
- The *content panel* on the right side provides a way to perform different functions within the program.

Getting Started

The steps to set up EasyTour are:

1. Install your software
2. Connect your Downloader to your computer
3. Initialize your PIPE
4. Plan your checkpoint assignments
5. Read your checkpoints with The PIPE
6. Download The PIPE

7. Define your checkpoints
8. Create one or more routes
9. Begin making tours
10. Maintain checkpoints and routes as needed.

Installation

Installing EasyTour Software

The computer where you install EasyTour must have one of these operating systems:

- Windows XP with SP3 or later, 32-bit only
- Windows Vista with SP1 or later, 32 or 64-bit
- Windows 7, 32 or 64-bit

To install EasyTour:

1. Place the EasyTour CD in the drive.
2. The installer should begin automatically. If it does not, click Start, Run and browse to the CD drive. Locate the setup.exe file and click OK.
3. The installer checks to see whether .NET version 3.5 SP1 or later is installed. If it is not installed, the InstallShield Wizard pre-requisite screen opens with .NET version 3.5 SP1 in a status of "Pending". Click on "Install" to begin installing this required component. You may also install .NET version 3.5 SP1 from the folder "Microsoft .NET Framework 3.5" on the EasyTour CD.
4. Follow the additional installer instructions. After the installation is complete you must restart the computer before you can use EasyTour.

Connecting Your Downloader

Once EasyTour is installed, connect a single Downloader to the computer via an available serial or USB port and power it on.

When EasyTour is started, it will automatically attempt to locate and identify the downloader. It is not necessary for a PIPE to be placed in the downloader for EasyTour to successfully locate and identify a Downloader.

If successful, EasyTour will display the following status message:

Found DirectDownloader on COM3
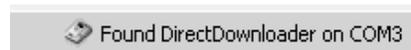
EasyTour is now fully operational and ready to download a PIPE.

If EasyTour is unable to locate a Downloader it will display the following message:

Could not find a downloader.
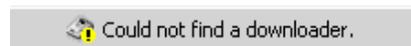
If you receive this message, here are some possible causes:

- The downloader is not powered on.

- The downloader is not correctly connected to the computer.
- There is a configuration problem on the serial or USB port which is preventing EasyTour from opening the port.
- The port is already being used by another application such as HotSync or ActiveSync.

Starting the Program

Click on the EasyTour icon to start the program.

- The first time EasyTour runs, it creates empty data files for checkpoints, routes, tours, and system options.
- If your downloader is connected correctly, EasyTour will identify it and display a message in the status bar.

Found DirectDownloader on COM3

Initialize the PIPE

Before reading any checkpoints, make sure your PIPE is cleared of data and its time is correctly set.

To clear the PIPE:

1. Put the PIPE in the downloader. The current status of the pipe is displayed in the status bar.
2. If the pipe is already cleared of data, the message displayed is:

PIPE A102FA was empty

   The PIPE's time is set to the computer's time.
3. If the PIPE contains data, the message displayed is:

PIPE A102FA was downloaded successfully (5 records)

   The data in the PIPE is downloaded, the PIPE is cleared, and its time is set to the computer's time.
4. If there was data in the PIPE, new checkpoints are added. These should be deleted from EasyTour before you proceed. See *Editing Checkpoints,* below, for instructions.

Checkpoints Setup Workflow

Planning Your Checkpoint Assignments

Before you begin, you should plan which officers, locations, and/or observations will be assigned checkpoints. EasyTour helps you to make these assignments.

Once you have determined this, you will read checkpoints with The PIPE, download The PIPE and enter the information for each checkpoint in EasyTour.

Reading and Downloading Checkpoints

Read your checkpoints in the order you plan to assign them, then place THE PIPE in the downloader. EasyTour will download the information and display a message on the status bar.

PIPE A102FA was downloaded successfully (32 records)

When your download includes buttons that EasyTour does not recognize, it will ask you if you want to define them.

New Checkpoints

New checkpoints were added.
Do you want to define them now?

Yes   No
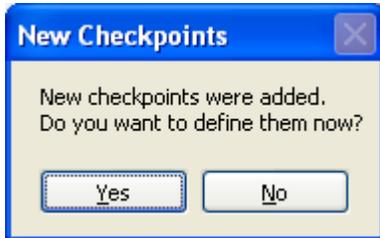
Click "Yes" to define checkpoints.

Defining Checkpoints

EasyTour displays a list of undefined checkpoints.

Checkpoint ID	Type	Description
01 000012BB6FDD CD	Officer	Harrison, Andrew
01 000012BEE0A5 D1	Officer	Raysman, Warren
01 000012BAF59F 53	Location	Northwest Entrance
01 000012BF1CBB 91	Location	West Parking
01 000012BADF8D 23	Location	Loading Dock
01 000012BEE53B A1	Location	Undefined 0005
01 000012BC5E70 14	Officer / Location / Observation / Undefined	Undefined 0006
01 000012BEB325 E0		Undefined 0007
01 000012BC699E FB	Undefined	Undefined 0008

To define a checkpoint:

1. Click on the arrow and select a type: Officer, Location, or Observation.
2. Enter a description for the checkpoint.

Note: Officer and Location checkpoints must have unique descriptions.

When you have defined some or all of your checkpoints, click Save. If you haven't defined all your checkpoints, you can go back and define the others later:

1. Select Edit | Define Checkpoints from the menu bar.

Or,

1. Select the checkpoints treeview in the navigation panel.

2. Find the checkpoint you want to define in the treeview.
3. Right click on the checkpoint and select Define.

If you have not yet created any routes, EasyTour will ask if you want to create routes now.

New Route

Do you want to set up a new route?

Yes   No
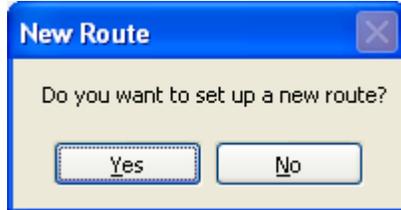
Click "Yes" to create a new route.

Creating New Routes

EasyTour displays a list of available Locations.

Route Name: Willow Valley Medical Building

Available Locations

Roof / HVAC
Stairwell North, 2nd Floor
Stairwell North, 3rd Floor
Stairwell South, 2nd Floor
Stairwell South, 3rd Floor

Route Locations

Northwest Entrance
West Parking
Equipment Storage
Loading Dock
Lobby

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To create a route:
1. Assign a name for the route. Routes must have unique names
2. Click on the arrow buttons to select the locations that will be included in this route.

When done, click Save. If you haven't created all your new routes, you can go back and create the others later (Note: these options are only available if there are Location Checkpoints that have not yet been assigned to an existing Route):

1. Select Edit | New Route from the menu bar.

Or,

1. Select the Routes treeview in the navigation panel.
2. Right click on "Routes" or any existing route in the treeview and select New Route.

Maintaining Checkpoints and Routes

Editing Checkpoints

To change an Officer, Location, or Observation checkpoint's description:
1. Select the checkpoints treeview in the navigation panel.
2. Find the checkpoint you want to change in the treeview.
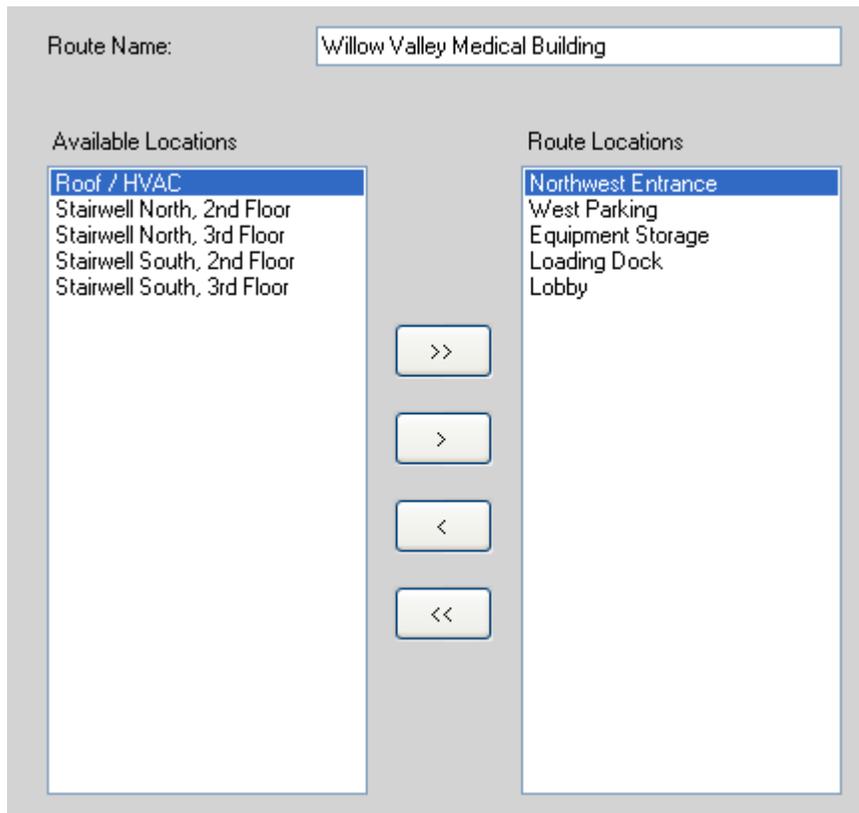3. Right click on the checkpoint and select Edit.
4. Type the new description for the checkpoint.

To delete a checkpoint:
1. Select the Checkpoints treeview in the navigation panel.
2. Find the checkpoint you want to change in the treeview.
3. Right click on the checkpoint and select Delete. The checkpoint will also be deleted from any route it is a member of.

Undefining/Redefining Checkpoints

To change an officer, location, or observation checkpoint to undefined, right click on the checkpoint and select Undefine. The checkpoint can then be redefined as described in *Defining Checkpoints*, above.

Editing Routes

To change a route's locations:
1. Select the Routes treeview in the navigation panel.
2. Find the route you want to change in the treeview.
3. Right click on the route and select Edit.
4. Change the route name. Routes must have unique names .
5. Add or remove locations with the arrow keys.
6. When done, click Save.

Downloads

About Downloads

A download is simply a list of the buttons transferred from THE PIPE.

When EasyTour is running, and you place a PIPE in the downloader, the data is transferred to a download file on your computer, and the PIPE is cleared.

Download Reports

To view or print a single download:

1. Select the Downloads treeview in the navigation panel.
2. Double-click on the download you want to view.
3. To print, click Print.

To view or print multiple downloads:

1. Select the Downloads treeview in the navigation panel.
2. Right click on one of the folders ("Today", "Yesterday", etc.)
3. Select Report.
4. (Optional) Change the From and To dates to select a range of downloads.
5. Click View to see the downloads you have selected.
6. To print, click Print.

Or:

1. Select Report | Downloads from the menu bar.
2. (Optional) Change the From and To dates to select a range of downloads.
3. Click View to see the downloads you have selected.
4. To print, click Print.

Select "Show Tour Processing Detail" to include the detail on how EasyTour interpreted the downloaded data into Tours. Use this option to troubleshoot questions with tour reporting.

Tours

About Tours

A tour is a series of visits – checkpoint reads – at the locations you have grouped together into a route. Ideally, a tour will:

- Start with an officer checkpoint
- Include all the locations in the route
- (Optional) Include observations made at one or more location

Tours can have one or more errors:

- Missed locations
- Unassigned locations
- Undefined checkpoints

Tour Reports

To view or print a single download:

1. Select the Tours treeview in the navigation panel.
2. Double-click on the tour you want to view.
3. To print, click Print.

To view or print multiple downloads:

1. Select the Tours treeview in the navigation panel.
2. Right click on one of the folders ("Today", "Yesterday", etc.)
3. Select Report.
4. (Optional) Change the From and To dates to select a range of tours.
5. (Optional) Change the Route and/or Officer to further filter the range of tours.
6. Click View to see the tours you have selected.
7. To print, click Print.

Or:

1. Select Report|Tours from the menu bar.
2. (Optional) Change the From and To dates to select a range of tours.
3. (Optional) Change the Route and/or Officer to further filter the range of tours.
4. Click View to see the tours you have selected.
5. To print, click Print.

How EasyTour Interprets Tours

After you download, EasyTour processes the downloaded checkpoint information into tours.

EasyTour starts a new tour:

- With every new download
- An officer checkpoint
- After a complete tour (i.e., a tour with no missed locations)
- A location checkpoint that belongs to another route
- Optionally, If no checkpoints have been read after a defined period (set in Edit | Preferences)

EasyTour assigns an officer to the tour based on the most recently read officer checkpoint. If no officer checkpoint was read since the last download, the tour will have no assigned officer and reports will show the officer as "Unknown".

EasyTour assigns observations to the most recently read location. An observation that precedes the first location in a tour is not included in the tour.

Undefined checkpoints that are read after the tour has begun but before the tour is complete are included with the tour as undefined checkpoint errors.

Best Practices

To get tours without errors, you should:

- Define all your checkpoints in EasyTour
- Read an officer checkpoint at the beginning of each tour
- Visit all locations in the route

Managing Your Data

How Data Is Stored

EasyTour stores its data in four XML files, checkpoints.xml, routes.xml, tours.xml, and system.xml. To determine the folder where EasyTour data is stored, select Help | Data File Location from the menu bar. Downloads are stored in the \Downloads subfolder, with a separate file for each download.

You should never modify the information in these files manually.

Backing Up Your Data

EasyTour does not have a built-in backup function. In the same way that you make copies of other important documents, you should back up your EasyTour data regularly, by copying the data files to a server, another computer, or to backup media like a CD.

Archiving Your Data

As you add data to your system, the number of download files will increase and the *tours.xml* data file will grow in size. This can eventually affect EasyTour's performance. Therefore, you should archive your data regularly.

To archive data:

1. From the menu bar, select File | Archive.
2. Select the archive date. Data prior to this date will be copied to the archive file(s).
3. Select whether you want to archive download data, tour data, or both.
4. Select whether you want to delete the archived data from the working data files.
5. Click Archive.

To determine the folder where EasyTour data is stored, select Help | Data File Location from the menu bar. Archives are stored in the \Archives subfolder, with a separate file for downloads and/or a separate file for tours.

Once the archive has been created, you can save it to more permanent storage medium like a CD or a server on your network.

Setting Preferences

Setting your EasyTour preferences is done by selecting Edit | Preferences from the menu bar.

Create a download file if the PIPE is empty

By default, EasyTour does not create a download file if there is no data in THE PIPE. However, you may need a record that a download took place.

To create a download file even the Pipe is empty, select the check box.

Start a New Tour if no location buttons have been read in 10 minutes

If this check box is selected, a new tour is started when a location button for the same route is scanned, but after the specified number of minutes have elapsed since the last location button for that route was scanned. Select this option when then same route is repeatedly toured, but with some definable minimum number of minutes in between each tour, and the officer is not required to scan their button at the start of each tour. See above, *How EasyTour Interprets Tours*, for more information.

Technical Support

How to Contact TimeKeeping Systems

Technical support for EasyTour is available from TimeKeeping Systems at easysupport@guard1.com .