Evidence 2.0.0 User manual Rev. A

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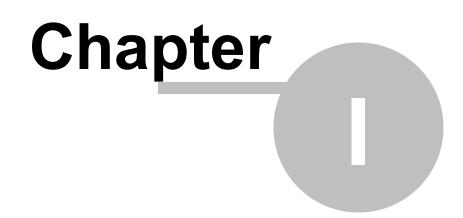
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# 1 Welcome to the Digifort 2.0.0 manual



This user manual and technical references provide all information necessary to effectively implement and use all of the basic and advanced features found in Evidence 2.0.0. This manual is constantly updated and does not describe the features of the Beta or Dev versions of the system.

#### 1.1 Screenshots

The screenshots contained in this manual may not be identical to the interface you will see using the software. Some differences may appear, without affecting the use of this manual. This is due to the fact that frequent updates and inclusion of new features are carried out with the aim of continually improving the system.

# 1.2 Who is this manual for

This manual is intended for system administrators and operators.

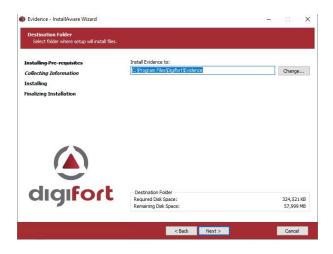


# 2 Installing the system

After running the installation program file, follow the steps below to install the system.

	Welcome to the InstallAware Wizar Evidence Installing Pre-requisites Collecting Information Installing Finalizing Installation	The InstallAware W	ogram is prote	all Evidence on your comp sched by copyright law an		
	Collecting Information Installing Finalizing Installation	WARNING: This pro	ogram is prote			
	Collecting Information Installing Finalizing Installation	WARNING: This pro	ogram is prote			
	Installing Finalizing Installation	WARNING: This pro	ogram is prote es.	cted by copyright law an	d	
	Finalizing Installation	WARNING: This provide the second seco	ogram is prote 25.	ected by copyright law an	d	
		WARNING: This pro international treation	ogram is prote es.	ected by copyright law an	d	
		WARNING: This pro international treational t	ogram is prote es.	ected by copyright law an	d	
	digifort					
			< Back	Next >		Cancel
ck Next.						
	Evidence - InstallAware Wizard				-	
	Customer Registration Please enter information on yourself.					
	Installing Pre-requisites	User Name:				
	Collecting Information	Windows User				
	Installing	Organization:				
	Finalizing Installation	Organization				-

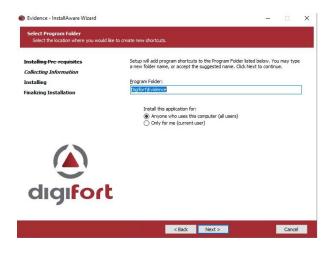
Enter your registration information and click Next.



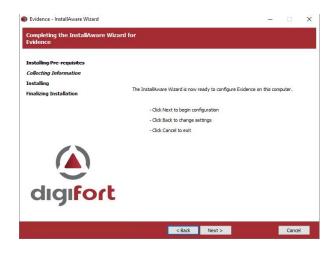
Select the location where the files will be installed and click Next.

#### Important

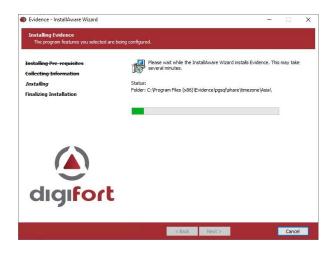
In addition to the files necessary for the system to function, a database instance will be initialized in this folder. The database is responsible for storing all system data.



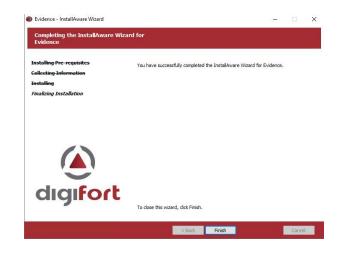
Select the Windows start menu folder where the shortcuts will be created and click Next.



Click Next again to confirm the settings and begin the installation.



Wait for the installation process.



Click **Finish** to complete the installation.



# 3 Managing services

Evidence is a software developed on the web client-server platform, taking advantage of all the features and benefits that this platform provides.

In this type of platform, all information is stored on a central server responsible for its management. The server is the component responsible for, among other functions, maintaining created incidents, configurations and allowing users to navigate the system through an Internet browser.

The Evidence Server is an application that runs as a Windows service, therefore, it runs automatically when Windows starts, without the need for user intervention.

The Service Manager is the software responsible for controlling its execution, showing information about its operating state and providing service installation and startup controls.

This solution is made up of two services responsible for different functions:

- Evidence: This is the service responsible for, among other functions, maintaining created incidents, configurations and allowing users to navigate the system through an Internet browser.
- Evidence Database: This service provides access to a PostgreSQL database, responsible for storing configurations and incidents.

#### 3.1 Running the service manager

To run the service manager, locate its icon on your Desktop or in the start menu and run it.

	ort		_		×
erviços Digifort:					
Serviços	Status	Plataforma	Arquivo		
Evidence	Serviço em funcionamento	64 bit	"C:\Program Fi	les\Digif	ort\
Evidence - Banco de dados	Serviço em funcionamento 64 bit		"C:\Program Files\Digifort\.		

The service manager provides the following functionality:

- Services Digifort: Displays the list of available services that can be managed.
- Start: Starts the selected service. Only available if the service is installed and stopped.
- Stop: Stops the selected service. Only available if the service is installed and started.
- Install Service: Installs the selected service. Only available if the service is uninstalled.
- Uninstall Service: Uninstalls the selected service. Only available if the service is installed and stopped.



# 4 Accessing the system for the first time

The system must be accessed via the Internet browser using the link: https://127.0.0.1:4433

Usuário*	
Senha*	
	Esqueceu sua senha
Lembrar	

Enter the username and password to access the system.

#### Important

- The default user has the following credential: User: admin
- Password: admin

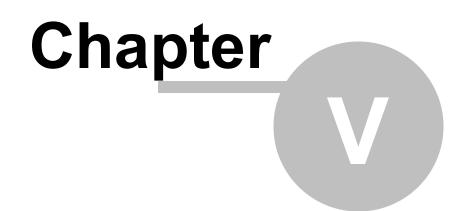
#### Important

For security reasons, we recommend changing the admin user password upon first access.

## 4.1 First configuration steps

Use the following steps to have your system ready to use:

- 1. Add the licenses to the software. See the topic Licensing.
- 2. Prepare system settings. See the topic System settings.
- Add the Digifort servers. See the topic <u>Digifort servers</u>. You can skip this step if you don't need to import users or add cameras to incidents.
- 4. Add or import users. See the topic Users.
- 5. Add user groups to define their permissions. See the topic User groups.
- 6. Add incident priorities. See the topic Priorities.
- 7. Add incident forms. See the topic <u>Forms</u>. You can skip this step if you don't need to add custom fields to the incident form.
- 8. Add incident types. See the topic Incident types.



# 5 System serttings

The system settings module is a crucial tool that allows administrators to adjust and customize various functionalities. This module offers a set of options that help adapt the system to the organization's specific needs, ensuring that it operates efficiently and aligned with internal processes.

# 5.1 Accessing system settings

In the side menu, click on the System Settings option to access the module.

		≡ Evidence	A
+	New incident		
ē	Incidents	🗇 Repository	
.:1	Analytics	Repository path*	
Do	Users	This is the location where the incident attachments will be stored	
3	User groups	If the repository path is changed, incident attachments will not be automatically moved to the new location. Files must be moved	
	Forms	manually. The files can be moved from the old location to the new location while the system is running.	
$\Diamond$	Incident types		
!	Priorities	E Server	
	Digifort servers		
193	System settings	Server domain*	
0	Licensing	Save	

# 5.2 Configuring the repository

Defining the repository is a crucial step in system configuration, as this is where files attached to incidents will be stored. Depending on how the system is used, it is very likely that the demand for disk space will be high, so you can choose to specify a dedicated disk or storage unit or a mapped network drive.

# Important

By default, the system is configured to save data in a subfolder of the location where it is installed.

3	Repository	
Repo	pository path*	
e:\i	\incidents\	
This	is is the location where the incident attachments will be stored	
	repository path is changed, incident attachments will not be automatically moved to the new location ually. The files can be moved from the old location to the new location while the system is running.	n. Files must be moved
		Say

## 5.3 Server settings

Sometimes the system needs to generate links that can be used to access some area of the system. For example, when a user wants to recover their password through the login form. In this case, the system will send an email to the user with the link to reset the password. This link is generated based on this information, which tells how the system can be accessed externally.

- You can set this address based on the following examples:
- <u>https://192.168.0.1</u>. Points to the server's IP address.

- https://evidence-server. Points to the server name.
- https://www.company-name. Points to the FQDN of the server where the system is hosted.

E Server	
Server domain*	
	Save

# 5.4 Configuring the SMTP server

SMTP configuration, used by the system to send emails.

SMTP		
SMTP		
Host*	Port*	
Sender address*		
Username*	Password*	
Enable SSL		Save

- Address: SMTP server address.
- **Port:** SMTP server port.
- Sender: Email address that will be used to send emails.
- **User:** SMTP server username.
- **Password:** User password.
- Enable: SSL: Enables communication using SSL.

#### 5.5 Map settings

Use the field below to set the Google Maps API key.

Google Maps is used in some areas of the system, such as the custom location field. Search the Internet for how to generate your Google API key.

Мар	
gle Maps API key er your API Key	
	Save



# 6 Licensing

Evidence must be licensed for incident insertion and search functionality to be enabled. All configuration features do not require a license.

Licenses enables a certain number of users to use the system. Multiple licenses can be added to free up more users.

# 6.1 Accessing the licensing module

In the side menu, click on the **Licensing** option to access the module.

New incident							
	Evidence	e 2.0.0					
Incidents							
Analytics	Machine	e key					
Users	D8C0-E	VD-1A54A86-04928	*CBCF96/2CCF-M	KEY-4748D0			0
User groups							
Forms							
Incident types	Insta	alled Licenses - 8	3 licensed user	s			
Priorities		id	Part number 🛧	Licensed users	Expiration date	Status	
Digifort servers		6b4d0656-0c60- 4bcd-9076-	EVDSV1908V2	8	Aug 1, 2024	Valid	
System settings		737936a9935d	EVD5V1908V2	۰	Aug 1, 2024	Valia	
Licensing				Items per page: 10	- 1 - 1 of 1		
	Upload	license file					
	Lice	nsed users					
		Name 🛧		E-mail			
	A	Administrator					
	UI	User 1					
	U2	User 2					

## Machine key

Licenses are generated exclusively for your server based on this unique ID called Machine Key.

### 6.2 Adding licenses

To add licenses, click the Upload license file button. Select the license file and confirm.

		≡ Evidence	A
+	New incident		
ē	Incidents	Evidence 2.0.0	
	Analytics	Machine key	
Do	Users	Upload license file	D
ő	User groups		
	Forms	Select a file to upload	
$\diamond$	Incident types		
ļ.	Priorities	Status	
	Digifort servers	Cancel OK 4bcd-9076- EVDSV1908V2 8 Aug 1, 2024 Valid	
÷	System settings	737936a9935d	
2	Licensing	Items per page: 10 💌 1 - 1 of 1 1 < < >	
		Upload license file	

Repeat this operation for each license file to be added.

If the license is valid, your data will be displayed in the table on this page.

	$\bigcirc$	≡ Eviden	ce					
+	New incident							
ē	Incidents	Evidenc	e 2.0.0					
.:1	Analytics	Machin	e key					
Po	Users	D8C0-E	VD-1A54A86-04928	*CBCF96/2CCF-MI	(EY-4748D0			D
2	User groups							
₿	Forms							
	Incident types	Inst	alled Licenses - 8	B licensed users	3			
i	Priorities		id	Part number 1	Licensed users	Expiration date	Status	
3	Digifort servers		6b4d0656-0c60- 4bcd-9076-	EVDSV1908V2	8	Aug 1, 2024	Valid	
<b>3</b>	System settings		737936a9935d		-			
	Licensing	_		It	ems per page: 10 🔻	1 - 1 of 1		
		Upload	license file					

- Id: License identification
- Part number: License code
- Licensed users: Number of users enabled by this license.
- Expiration date: Expiration date of the license, if it is a trial license.
- Status: State of the license which can be Valid, Invalid or Expired.

# 6.3 Removing licenses

If necessary, licenses can be removed by clicking the 3-dot button next to each item, and then **Delete**.

		≡ Evidenc	e					
+	New incident							
ē	Incidents	Evidence	2.0.0					
, cl	Analytics	Machine	e key					
2	Users	D8C0-E	VD-1A54A86-04928	*CBCF96/2CCF-N	/KEY-4748D0			D
00	User groups							
	Forms							
$\Diamond$	Incident types	Insta	Illed Licenses -	3 licensed use	rs			
1	Priorities		id	Part number 🛧	Licensed users	Expiration date	Status	
-	Digifort servers		6b4d0656-0c60- 4bcd-9076-	EVDSV1908V2	8	Aug 1, 2024	Valid	
(i)	System settings		737936a9935d	21201130012	с.	710g 1, 2024	Vana	

# 6.4 Viewing licensed users

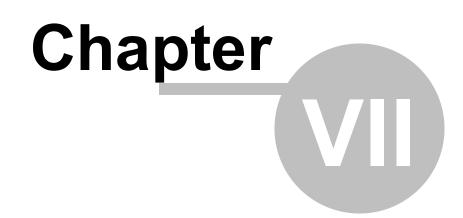
7

Г

Licensed users can be viewed at the bottom of the page.

If you do not have enough licenses for all users, you can suspend some users. Licenses are only applied to active users. See the topic <u>Suspending users</u>.

		$\equiv$ Evidenc	e							A
+	New incident		6b4d0656-0c60-							
ō	Incidents		4bcd-9076- 737936a9935d	EVDSV1908V2	8		Aug 1, 2024	Valid	•••	
<b>.:</b> ]	Analytics				Items per page:	10 -	1 - 1 of 1			
Do	Users	Upload I	icense file							
00	User groups									
	Forms	Licer	ised users							
	Incident types	LIGGI								
ļ	Priorities		Name 🛧			E-mail				
•	Digifort servers	A	Administrator							
ŝ	System settings	U1	User 1							
0	Licensing	U2	User 2							
					Items per page:	10 🔹	1 - 3 of 3			



# 7 Digifort servers

Evidence can be integrated with Digifort to add some functionality to both systems:

- Allows you to import users registered in Digifort. Imported users will be logged in directly to the server from which they were imported.
- Allows you to import videos from cameras and attach them to incidents.

Multiple servers can be imported to work at the same time.

# 7.1 Accessing the Digifort servers module

In the side menu, click on the option Digifort Servers.

		≡ Evic	lence						
+	New incident								
ō	Incidents	Dig	gifort servers	Q Search		$\supset$			Ð
.:]	Analytics		Name 🛧	Description	Address	Port	Enable SSL	Status	
Do	Users								
00	User groups		Local		10.1.30.2	8601		Online	
₿	Forms				Items pe	r page: 10 💌	1 - 1 of 1		
	Incident types								
i	Priorities								
	Digifort servers								
<b>(</b> )	System settings								
0	Licensing								

# 7.2 Adding Digifort servers

To add servers, click the button  $\bigcirc$ .

New Digifort s	erver		
-			
Name*			
Description			
Address*		8601	
Password			
Enable SSL			

- Name: Server name.
- **Description:** An optional description.
- Address: IP address, computer name, or FQDN of the server.
- Port: TCP port
- **Password:** Password of the Digifort **admin** user.
- Enable SSL: Enables communication using SSL.

After filling in all the necessary data, you can click the **Test connectivity** button to validate the access settings.

At the end of the configuration, click the **Save** button. You will be automatically redirected to the server modification page. See the topic <u>Modifying Digifort servers</u>.

# 7.3 Modifying Digifort servers

To modify servers, click on the name of the server you want to modify.

≡ Evidence		
Cocal		
Digifort server	Name* Local Description Local server	
	Address* 127.0.0.1	8601
	Password  Enable SSL  Test connectivity	
		Save

On the left side there is a menu where more settings can be made.

- Digifort server: Allows you to modify the server's main data.
- Delete:Removes the server from the system. See the topic Deleting Digifort servers.

## 7.4 Deleting Digifort servers

When deleting a server the following features will be removed:

- Users imported from this server will only be able to authenticate if there is another server added with the same registered users. See the topic User authentication process.
- Cameras from this server can no longer be imported and attached to incidents.

To delete servers, click the **Delete** button, as shown in the image below:

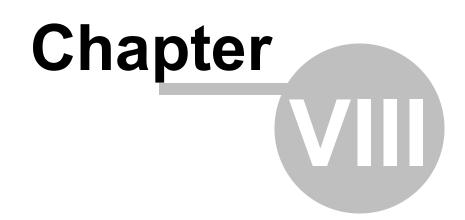
-	Evidence		
	Ce Local		
	Digifort server	- Name*	
	Delete		
		Description	
		Address*	Port*
		127.0.0.1	8601
		Password	
		Enable SSL	
		Test connectivity	
			Save

Another way to exclude servers is through server registration. Next to each item there is a three-dot button with the option to remove it.

You can also use check boxes to remove more than one item at the same time. Select the items to be

≡ Evidence + ē Q Search... **Digifort servers** 2 selected 1:1 Description Address Port Enable SSL Status  $\checkmark$ Name ↑ 00 ~ Local Local server 127.0.0.1 8601 Online ••• 0  $\checkmark$ Remote 189.24.24.56 8601 Offline •••• 1 - 2 of 2 Items per page: 10 👻 i • 1 0

removed and then click 🔟.



# 8 Users

The user module allows the management of system users. This module is essential to ensure that only authorized people can access and interact with the software. Users can be registered manually or imported from Digifort, facilitating data integration and administration.

# 8.1 User types

Evidence can work standalone or integrated with Digifort.

The system provides 2 types of users:

- Native user
- Imported user

The way you will use the software will determine the type of user you will use. You can combine native and imported users to work at the same time.

#### 8.1.1 Native user

Native users can use all software functions, except importing videos from Digifort to be included in incidents. See the topic Managing cameras.

#### 8.1.2 Imported user

Imported users can use all system functions, including the functionality to import videos from Digifort cameras to incidents. See the topic <u>Managing cameras</u>.

#### 8.1.3 Differences between native and imported users

Feature	Native user	Imported user
Authentication	Authentication is done in the local database	Authentication is done on the remote server
Active Directory authentication	No	Yes, through the integration of Digifort with Active Directory
Import videos from Digifort cameras	No	Yes
Changing user passwords	The password can be changed directly in Evidence	The password must be changed directly in Digifort

# 8.2 Accessing the users module

In the side menu, click on the Users option to access the module.

<ul> <li>New incident</li> </ul>					
Incidents	Users	Q Search		4	Đ
Analytics		Name ↑	E-mail	Status	
L Users					
User groups		Administrator	admin@digifort.com.br	Active	
Forms		Francisco Zanini	francisco@digifort.com.br	Active	•••
> Incident types		Guilherme Silva	guilherme@digifort.com.br	Suspended	
Priorities		Ismael Silva	ismael@digifort.com.br	Active	
Digifort servers		Leandro Gonzales	leandro@digifort.com.br	Suspended	
3 System settings		Lucas Cordeiro	lucas@digifort.com.br	Active	•••
Licensing			Items per page: 10 💌 1 – 6 of 6		

# 8.3 Adding users

To add users, click the button  $\bigcirc$ .

	≡ Evidence	
+		
ē	Kew user	
11		
0°	First name*	
õ		
	Username* E-mail	
$\Diamond$		
i	Save	
*	Unit	
ŝ		
۹		

- Name: The user's first name.
- Last name: The user's last name. This is optional information.
- **Username:** This is the username that will be used to log in to the system.
- E-mail: The user's e-mail is optional information. If this value is entered, it can be used by the system to send messages by email.

After filling in the data, click the **Save** button. You will be automatically redirected to the user change page, where further settings can be made. See the topic <u>Modifying users</u>.

#### Important

Newly created users do not have any access rights to the system. To configure access rights, see the topics Managing groups e <u>User groups</u>.

#### Important

Newly created users do not have a defined password and cannot access the system. If the email has been informed, the user will automatically receive a link to set their password. See the topic <u>Resetting the user's password on the login screen</u>. If the email has not been provided, you can set the user's password yourself, see the topic Modifying the user password.

#### 8.3.1 Setting the user's first password

When adding a user, if the email address is provided, the system will automatically send an email to the user to set their password. For automatic email sending to work, the SMTP settings must be previously configured. See the topic Configuring the SMTP server.

If the email is not provided, a password must be created in one of the following ways:

- Clicking on the **"Forgot your password?"** on the login page. See the topic <u>Resetting the user's</u> password on the login screen.
- Setting a password through user registration. See the topic Modifying the user password.

## 8.4 Modifying users

To modify users, click on the name of the user you want to modify.

	≡ Evidence		•
+ =	Ismael S ismael@dig		
o \$ 1 < 0 1	<ul> <li>Personal data</li> <li>Strain Coups</li> <li>Profile picture</li> <li>Reset password</li> <li>Suspend user</li> <li>Delete</li> </ul>	First name* Ismael Username* ismael	E-mail ismael@digifort.com.br
ш			

On the left side there is a menu where further user settings can be made.

- Personal data: Allows you to modify the user's main data.
- Groups: Allows you to add and remove users from groups. See the topic Adding users to groups.
- **Profile picture**: Allows you to add and remove the user's profile picture. See the topic <u>Setting profile</u> picture.
- **Reset password:** Allows the administrator to set a password for the user. See the topic <u>Modifying the</u> user password.
- **Suspend user:** Allows you to suspend the user. Suspending a user blocks complete access to the system. See the topic Suspending users.

• Delete: Removes the user from the system. See the topic Deleting users.

#### 8.5 Deleting users

When deleting a user, they will no longer be listed in the user registry and their access will be permanently blocked, but their data will not be removed. This way all incidents created by this user will still have their name linked.

Although the user's data is preserved when removing it, a user with the same data may be created in the future.

To delete users click the **Delete** button.

	e@digifort.com.br	Suspended use
	~ ~	
A Personal data	First name*	Silva
:2: Groups		
Profile picture		guilherme@digifort.com.br
**** Reset password	guinerne	guineme augrot combi
		Sav
Delete		
III Delete		

Another way to exclude users is through user registration. Next to each item there is a three-dot button with the option to remove it.

You can also use check boxes to remove more than one item at the same time. Select the items to be removed and then click

≡ Evidence + ē 3 selected Q Search.. Users III AS 1:1 E-mail Name ↑ Status 8 Administrator admin@digifort.com.br Active 00  $\checkmark$ Francisco Zanini francisco@digifort.com.br Active ... Guilherme Silva guilherme@digifort.com.br Suspended ... 0 i  $\checkmark$ Ismael Silva ismael@digifort.com.br Active Delete • LG Leandro Gonzales leandro@digifort.com.br Suspended .... 1  $\checkmark$ Lucas Cordeiro lucas@digifort.com.br Active ... 0 Items per page: 10 \* 1 - 6 of 6

# 8.6 Managing groups

To add or remove user groups, click the **Groups** button. A list of groups will be displayed containing all the groups this user belongs to.

	smael Silva smael@digifort.com.br						
د Personal da	a	r groups	Search			õ-	Ð
:2: Groups	030	groups C	<b></b>				-
Profile pict	re 🗌	Group name ↑		Descri	ption		
*** Reset pass	ord	Incidents					
🙎 Suspend us	r		Items per page:	10 👻	1 - 1 of 1		
🔟 Delete			the second se				

#### 8.6.1 Adicionando grupos à usuários

To add groups to the user, click the button igodot.

	≡ Evidence			۵
+				
ō	€ [₽	Ismael Silva		
::1		Select user groups		
2	2 Perso			
00	:At Group	User groups Q Search		27 🕂
	(2) Profile	Name ↑	Description	
$\diamond$	*** Reset	Admins	User group for administrator users	
i.	🔀 Suspe		osci gioup ini administrator ascis	16 6 3 31
	T Delete	Newble users	1 - 2 of 2  < < > >	1¢ < > >1
e S				_
E .			Cancel OK	

Select the desired groups and click **OK**.

#### 8.6.2 Removing groups from users

To remove a user's group, click the three-dot icon next to each group name and then select **Remove** 

user from group, or select one or more groups using the check boxes and then click the

# 8.7 Setting the profile picture

The profile picture allows the user to be identified in an easier and more personalized way on all screens where the user is referenced.

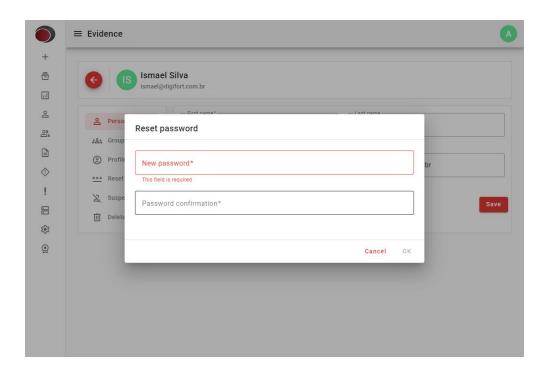
To set your profile picture, click the **Profile picture** button.

$\equiv$ Evidence		
	Profile picture	
€ (		
A Perso		27 🕂
:음t Group	4 5 7 1	
Profile		
*** Reset		•••
X Suspe		
🔟 Delete	I< <	
-		
	t Change 🔟 Remove	
	Cancel OK	

Use the positioning and resizing tools to crop the image as needed and then click **OK**.

#### 8.8 Modifying the user's password

To change the user's password, click the **Reset password** button.



#### Important

Imported users cannot have their password changed. It must be changed directly in the system into which it was imported.

#### Тір

The user can reset their password using the Forgot your password? button on the login page. See the topic Resetting the user's password on the login screen.

## 8.9 Suspending users

To suspend a user, click the **Suspend user** button. A suspended user will have their access blocked until they are reactivated again.

#### 8.10 Importing users

Importing users is a big advantage if you are using Evidence integrated with Digifort, such as:

- Centralized user database.
- Import videos from Digifort cameras.

To import users click the button  $^{\textcircled{}}$ .

Users	Q Search		ى 🕁
	Name 🛧	E-mail	Status
	Administrator	admin@digifort.com.br	Active
0 🕫	Francisco Zanini	francisco@digifort.com.br	Active
🗆 GS	Guilherme Silva	guilherme@digifort.com.br	Suspended
	Ismael Silva	ismael@digifort.com.br	Active
	Leandro Gonzales	leandro@digifort.com.br	Suspended ····
	Lucas Cordeiro	lucas@digifort.com.br	Active
		Items per page: 10 👻 1	I-6 of 6   < < > )

Select the server that contains the users you want to import.

# Important

The server must be previously registered, see the topic Digifort servers.

After selecting the server, the system will query the available users.

Import users from	Digifort Q Search	)		
Name 🛧	Description	Notes	Status	
francisco	Francisco Luiz Zanini		Imported	
gabriel	Gabriel Ortigoso		Ready to import	ol
gabriel.lima	Gabriel de Souza Lima		Ready to import	
geovane	Geovane Rocha		Ready to import	
giovani	Giovani - Parceiro Digifort do F	Paraná	Ready to import	
glauco	Glauco		Ready to import	
GSS			Ready to import	
guilherme	Guilherme Alexandre da Silva		Conflict	
guilherme.oliveira			Ready to import	
gustavo	Gustavo gcb. Cardoso Bianchi	ni	Ready to import	

Each listed user has the following statuses:

- Ready to import: User can be imported
- Imported: The user has already been imported
- **Conflict:** There is already a native user registered with the same username. You cannot import this user without first removing the native user. To understand more about types of users, see the topic

#### User types.

Impor	users from Digifort	Search	-
Name 🛧	Import user		Status
francisco	Giovani	Last name	Imported
gabriel	Username*		eady to import
gabriel.lir	giovani	E-mail	eady to import
geovane			eady to import
giovani		Cance	el OK eady to import 🔗
glauco	Glauco		Ready to import
GSS			Ready to import

After locating the user you want to import, click the button  $\stackrel{ extsf{abs}}{\longrightarrow}$ 

Fill in the mandatory user data and click OK.

#### Important

Newly imported users do not have any access rights to the system. To configure access rights, see the topics <u>Managing groups</u> e <u>User groups</u>.

# 8.11 User authentication process

The user authentication process is different for each type of user. See below the authentication method for each type of user.

### 8.11.1 Authentication of native users

Native users authenticate directly to the local database with the provided credential.

### 8.11.2 Authentication of imported users

Imported users are authenticated directly on their source system, that is, they are authenticated on the server from which they were imported. At login time, Evidence server attempts to authenticate to the Digifort server, which in turn will validate the credentials in its local database or, if integrated, in Active Directory.

In scenarios where more than one Digifort server is used in the same environment, it is common practice for the same users to be registered on all servers. In this case, all these servers can be registered in Evidence. During the login process for an imported user, Evidence will first attempt to log in to the server where the user was imported. If the server is unavailable, Evidence will attempt to log in to all other servers sequentially. If no server accepts the credentials, access will not be permitted.

# 8.12 Resetting the user's password

The user password can be reset in the following ways:

- Through the login page
- Through user register

• Through user account management

### 8.12.1 Resetting the user's password on the login page

When trying to reset the password using the login form, the user will receive an email with instructions to reset the password.

This email has a link that will take the user to the password reset page.

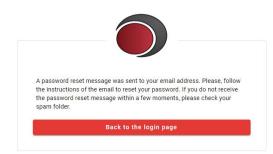
To reset the user's password via the login page, click the Forgot password? button.



V Didence X Didence X + - - X

You will be redirected to the password reset page, where you must enter your username.

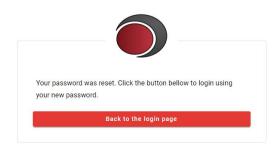
After entering the user name, click the **Submit** button.



The user should receive an email with a password reset link. When you click on the link, the password reset page will be displayed:

- Enter your new pas	sword*	
- Confirm the passw	*	

Enter the new password and confirm.



#### Important

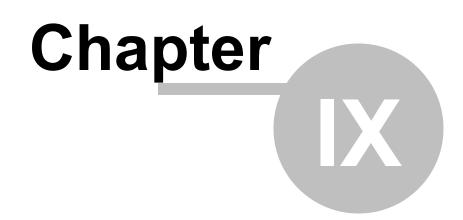
For this feature to work, the SMTP server must be properly configured. See the topic <u>Configuring the</u> SMTP server.

## 8.12.2 Resetting the user's password from the users register

To reset the user password using user registration, see the topic Modifying the user's password.

### 8.12.3 Resetting user password in account management

To reset the user's password through account management, see the topic Managing the user's account.



# 9 User groups

The user groups module allows the grouping of users with pre-determined roles in the system. You can, for example, create groups for system administrators, operators, among others. Creating user groups is a mandatory step in user configuration, as users without groups do not have any access permissions.

# 9.1 Accessing the user groups module

In the side menu, click on the User groups option to access the module.

	≡ Evidence	۵
+		
ē	User groups Q Pesquisar	
ات 2	□ Name ↑	Description
8	Admins	Users with administration rights
Đ	Operation	Users with operation rights
		Items per page: 10 👻 1 - 2 of 2  < < > >
!		
•		
193		
<b>9</b>		

# 9.2 Adding user groups

To add user groups, click the button  ${igoplus}$ .

≡ Evidence
New user group
Name*
Description
Save

- Name: The name of the group
- Description: Optional description of the group

After filling in all the necessary data, click the **Save** button. You will be automatically redirected to the user change page, where further settings can be made. See the topic <u>Modifying user groups</u>.

# 9.3 Modifying user groups

To modify user groups, click the name of the group you want to modify.

	≡ Evidence
- 5 0	Admins       User group for administrator users
	Structure       Name*         Admins         User rights         Delete         Delete    Save

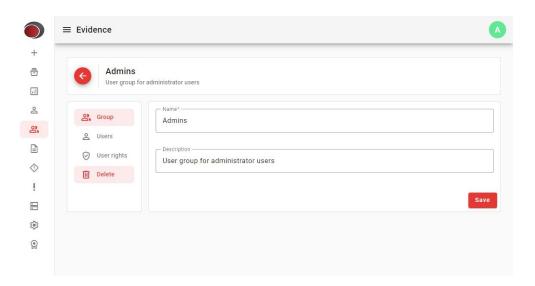
On the left side there is a menu where more group settings can be made.

- Group: Allows you to modify the group's main data.
- Users: Allows you to add and remove users from groups. See the topic Adding users to groups.
- User rights: Allows you to configure the access rights of users belonging to the group. See the topic <u>Configuring access rights</u>.
- Delete: Removes the group from the system. See the topic Deleting user groups.

## 9.4 Deleting user groups

When deleting an user group, users belonging to the group will not be removed from the system, only their access rights will be removed.

To delete groups click the **Delete** button.



Another way to remove user groups is through group registration. Next to each item there is a three-dot button with the option to remove it.

You can also use check boxes to remove more than one item at the same time. Select the items to be

removed and then click 🔟.

≡ Evider	се		
	groups 1 selected 🔟 🔍 Q s	Search	•
=	Name 🛧	Description	
	Admins	User group for administrator users	
~	Incidents		🔟 Delete
	Newbie users		
		Items per page: 10 🔹 1 - 3 of 3 I <	

# 9.5 Managing users

To add or remove users from the group, click the **Users** button.

A list of users will be displayed containing all users belonging to this group as shown in the image below:

Admins User group for	administrator users			
Sroup		-		
😤 Users	Users	Q Search		87 🕂
🕑 User rights		Name 🛧	E-mail	
🔟 Delete		Francisco Zanini	francisco@digifort.com.br	
		Guilherme Silva	guilherme@digifort.com.br	
	· · · ·	Items per page:	10 💌 1 - 2 of 2 🖂	

## 9.5.1 Adding users to groups

To add users to the group, click the button igodot.

C A	Select users			
Scout	Users	Q Search		<u>ع-</u> (+
S Users		Name 🛧	E-mail	
User User		Administrator	admin@digifort.com.br	•• rc
U		Ismael Silva	ismael@digifort.com.br	br ••
		Leandro Gonzales	leandro@digifort.com.br	1< < >
		Lucas Cordeiro	lucas@digifort.com.br	
		Items per page: 10 💌	1 - 4 of 4  < < > >	
			Cancel OK	

Select the desired users and click **OK**.

# 9.5.2 Removing users from groups

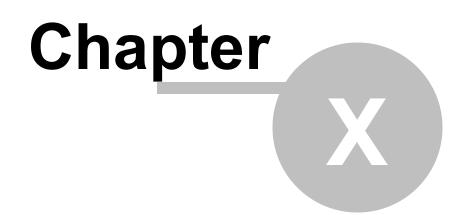
To remove a user from groups, click the three-dot icon next to each user's name and then select **Remove user from group**, or select one or more users using the check boxes and then click the button.

# 9.6 Configuring access rights

To configure access rights, click the User Rights button.

Incident	S	
Group	Users register	
ک Users	User groups register	
User rights	Priorities register	
III Delete	System settings	
	Incident types	
	Create new incidents	
	Digifort servers	
	Forms Licensing	

- Users register: Allows you to access registration, import, add, change and delete users.
- User groups register: Allows you to access the registration, add, change and delete user groups.
- Priorities register: Allows you to access the registration, add, change and delete priorities.
- System Settings: Allows you to modify system settings.
- Incident types: Allows you to access the registration, add, change and delete incident types.
- Create new incident: Allows the creation of incidents.
- Digifort servers: Allows you to access registration, add, change and delete servers.
- Forms: Allows you to access registration, add, change and delete forms.
- Licensing: Allows you to access, add and remove licenses.



# 10 Managing the account of the logged user

The system provides a page where the logged in user can change some of their settings. To access this page, click on the user's avatar button located at the top right of the page, and then on the **Manage account** button.



# 10.1 Modifying the user's data

To change the logged in user's personal data, click the **Personal data** button.

Personal data	User 1	
G Settings		Last name
Profile picture	Username*	E-mail
* Reset password	user1	user1@domain.com

- First name: User's name.
- Last name: User's last name.
- **Username:** User for authentication.
- E-mail: User's email.

# 10.2 Modifying the user's settings

To change the logged in user's settings, click the **Settings** button.

U1 User 1		
Personal data	Language*	
Settings		
Profile picture	Theme*	
*** Reset password		

- Language: User display language. Each user can use a different language of their choice.
- Theme: Display theme.

# 10.3 Modifying the profile picture

To change the profile picture of the logged user, click the **Profile picture** button.

A Administrator		
- Huncisco@dignord	conton	
<b>2</b> Dados pessoais	Administrator	
2. Configurações	Administrator	Sobrenome
Poto do perfil	- Usuário*	E-mail
**** Redefinir senha	admin	francisco@digifort.com.br
Kedenini senita		_

Select an image from your computer by clicking the **Change** button. You can use the framing controls to crop the image as needed.



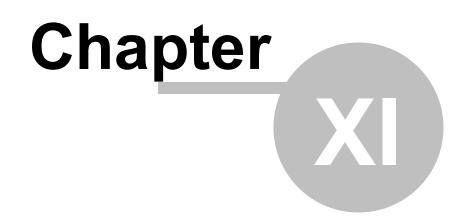
To remove the profile picture, click the **Remove** button. This way the initials of the user's name will be used to represent the user.

# 10.4 Resetting the password

To reset the logged in user's password, click the **Reset password** button.

$\bigcirc$	≡ Evidence	2
+	Redefinir senha	
ē	Adn Franci	
<u>iil</u>	Senha atual*	
Do	A Dados	
õ	2. Config	
B	( Foto d	
$\Diamond$	Confirmação da senha*	
i.		
•		Salvar
(ê);	Cancelar OK	
۲		

- **Current password:** Enter the user's current password. If you don't know your current password, use the **Forgot your password?** button on the login page. See the topic <u>Resetting the user's password on the login page</u>.
- **New password:** Enter the new password.
- **Password confirmation:** Enter the new password again to confirm.



# 11 **Priorities**

This module allows the user to manage priorities that can be assigned to incidents. Despite being optional, assigning priorities is essential to organize and handle incidents according to their urgency and importance, ensuring that critical events are handled in an efficient and timely manner.

# 11.1 Accessing the priorities module

In the side menu, click on the **Priorities** option to access the module.

		=	≡ Evide	nce				A
+	New incident							
ō	Incidents		Prio	rities	Q Search			•
.:1	Analytics				Priority	Name	Color	
Do	Users				Constraints			
8	User groups		=		1	High	-	
Đ	Forms		=		2	Medium		
$\Diamond$	Incident types		=		3	Low		•••
1	Priorities					Items per page: 10	✓ 1 - 3 of 3 I<	
•	Digifort servers							
ŝ	System settings							
0	Licensing							

# 11.2 Adding priorities

To add priorities, click the button  $\boldsymbol{\Theta}$ .

	≡ Evidence
+	
ō	New priority
ı:l	
Do	Name*
5	
Ē	
$\Diamond$	
1	Save
•	
ŝ	
۲	

- Name: Name of the priority.
- Color: The priority's color. Color helps visually identify the priority of incidents.

To select a color, click the black rectangle. A color selection window will appear as shown in the image below.



After filling in all the necessary data, click the Save button. You will automatically be redirected to the priority change page. See the topic <u>Modifying priorities</u>.

# 11.3 Modifying priorities

To modify priorities, click on the name of the priority you want to modify.

≡ Evidence		۵
e Mediur	n	
	La ware	
Priority	Name*	
11 Delete		
	Color*	
		Save

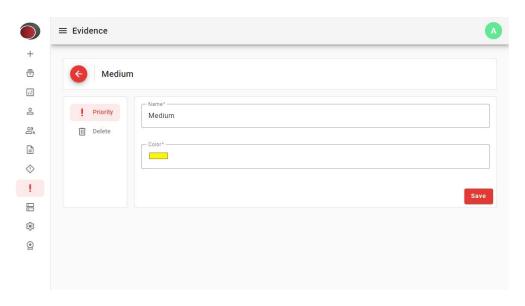
On the left side there is a menu where more settings can be made.

- Priority: Allows you to modify the main priority data.
- Delete: Removes priority from the system. See the topic Deleting priorities.

# 11.4 Deleting priorities

When you delete a priority, it will be disconnected from all incidents that were added with that priority. This way these incidents will not be prioritized.

To delete priorities click the **Delete** button.



Another way to exclude priorities is through the priority register. Next to each item there is a three-dot button with the option to remove it.

You can also use check boxes to remove more than one item at the same time. Select the items to be removed and then click 🔟.

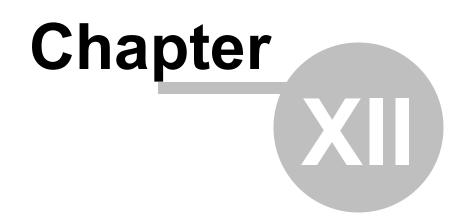
Prior	ities 2 sele	ected	h		G
	Priority	Nan	ne d	Color	
=	1	Hig	h	•	
	✓ 3	Low	i a		
=	✓ 4	Med	dium E		
			Items per page: 10 👻	] 1 - 3 of 3  < <	

#### 11.5 **Ordering priorities**

Priorities can be ordered so that they appear for user selection in a logical manner defined by the administrator.

To order priorities click on the button = and drag the item up or down, positioning it in the desired order.

Prio	rities	Q Search			Ð
		Priority	Name	Color	
		0	High	-	•••
=		1	Medium		
=		2	Low	-	•••
			Ite	ems per page: 10 👻 1 - 3 of 3 🛛 🖂	



# 12 Forms

The forms module is a tool that allows the creation of forms adapted to the specific needs of each type of incident. This module is essential for capturing detailed and relevant information about each incident, ensuring that all necessary data is collected in a structured and efficient way. With the forms module, administrators can create and manage custom forms with different types of fields, such as text, number, date, multiple selection, among others. These customized forms can be associated with different types of incidents, allowing for more accurate and appropriate data collection for each specific situation.

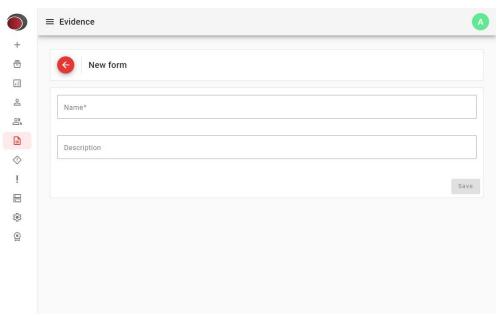
# 12.1 Accessing the forms module

In the side menu, click on the Forms option to access the module.

		≡ Evidence	A
+	New incident		
ē	Incidents	Forms Q. Search	
ı:l	Analytics	□ Name ↑ Description	
Do	Users		
00	User groups	Items per page: 10 💌 0 of 0 1 < < >	
	Forms		
	Incident types		
ļ	Priorities		
••	Digifort servers		
<b>(</b> )	System settings		
0	Licensing		

# 12.2 Adding forms

Para adicionar formulários, clique no botão 🔨.



- Name: Name of the form.
- **Description:** An optional description for the form.

After filling in all the necessary data, click the Save button. You will automatically be redirected to the form change page. See the topic <u>Modifying forms</u>.

# 12.3 Modifying forms

To change forms, click on the name of the form you want to modify.

	≡ Evidence		<b>A</b>
+			
ē	Form 1		
<b>[;]</b>			
Do	Form	Form 1	
2	🔄 Custom fields		
	🔟 Delete	Description	
$\Diamond$			
i			Save
•			
<b>1</b>			
) I			

On the left side there is a menu where more settings can be made.

- Form: Allows you to modify the main data of the form.
- Custom Fields: Allows you to manage the form's custom fields. See the topic Custom fields.

• **Delete:** Removes the form from the system. See the topic **Deleting forms**.

# 12.4 Deleting forms

When you delete a form, it will no longer be available for filling out incidents, but all incidents created with this form will be preserved.

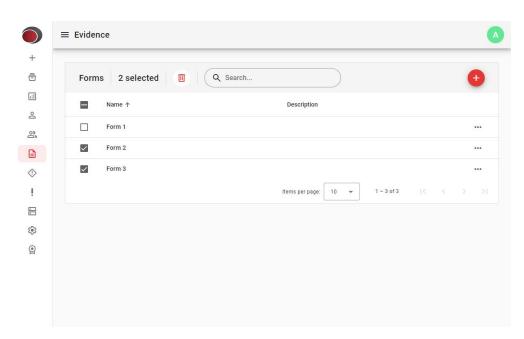
To delete forms, click the **Delete** button, as shown in the image below:

≡ Evidence	0
1	
Form 1	
Form	Name' Form 1
Custom fields	
Delete	Description
	Save
	Form 1

Another way to delete forms is through form registration. Next to each item there is a three-dot button with the option to remove it.

You can also use check boxes to remove more than one item at the same time. Select the items to be

removed and then click 🔟.



## 12.5 Custom fields

You can add custom fields to forms so that they can be filled in when an incident is added.

### 12.5.1 Custom field types

The following fields are available for use:

- Short text: A field for entering 1-line text.
- **Paragraph:** A field for entering multi-line text.
- Number: A field for entering numbers with maximum, minimum and scale validations.
- **Date:** A field for entering dates or selecting from a calendar.
- Time: A field for entering times.
- Datetime: A field that combines date and time.
- Checkboxes: A field where multiple options can be selected together.
- Multiple choice: A field with several options where only one of them can be selected.
- **Drop-down list:** A field with multiple options where only one of them can be selected from a dropdown list.
- URL: A field where a URL must be provided. When viewing an incident, links can be clicked to open in the browser.
- Location: A geographic location field. When filling out, the user can select the location on a map or search by address.

#### 12.5.1.1 Short text

A simple 1-line text field.

¢	Fc	New custom field
		- Field type*
	Form	= Short text • Field name*
睅	Custo	
Ū	Delete	Optional hint
		Field validation
		Maximum length*
		Mandatory
		Cancel OK

#### Validations:

- Minimum length: The minimum length of the text.
  Maximum length: The maximum length of the text.

## 12.5.1.2 Paragraph

A multi-line text field.

$\bigcirc$	≡ Evidence
+	
ē	Fc New custom field
1:1	- Field type*
Do	Form = Paragraph + Field name*
6	E Custo
	Delete Optional hint
$\diamond$	
i	Field validation
	Maximum length*
	Mandatory
۹	
	Cancel OK

#### Validations:

• Maximum length: The maximum length of the text.

### 12.5.1.3 Number

A numeric field.

	$\equiv$ Evidence		A
+ 5 2 2 1	Form Custo	New custom field  Field type*  Number  Optional hint  Field validation	•
!		Minimum value* Maximum value*	
\$ 0		Decimal places*  Mandatory	
		Cancel OK	

### Validations:

- Minimum value: The minimum value of the number.
- Maximum value: The maximum value of the number.
- **Decimal places:** Number of decimal places.

12.5.1.3.1 Examples



The value of the number must be at least 4 and no maximum value

The value of the number must be between 4 and 50

The value of the number must be between 4 and 50 and 2 decimal places

### 12.5.1.4 Date

A field that allows you to select a date from a calendar.

	≡ Evidence	A
+		
ē	Form 1	
,:I		
Do	Form New custom field	Ð
De	Field type*	•
	Delete Date Tield name*	
$\diamond$		
!	Optional hint	
( <u>)</u> ;	Constant Andrew Mandatory	
۹	Cancel OK	

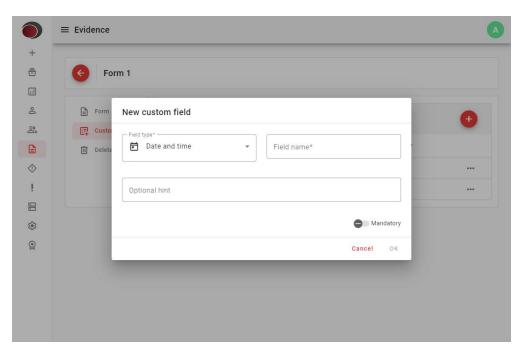
### 12.5.1.5 Time

A time field.

	≡ Evidence	A
+		
ē	Form 1	
.:]		
Do	Form New custom field	
00	E Custo	
8	Deleta O Time • Field name*	
$\diamond$		
ļ	Optional hint ····	
<b>(</b> )	Construction of the second sec	
) E	Cancel OK	

#### 12.5.1.6 Date and time

A field with date, selectable by a calendar, and time.



#### 12.5.1.7 Checkboxes

A field where several options can be selected together when filling out the incident.

$\bigcirc$	≡ Evidence	A
+		
Ē	Fc New custom field	
De Do	Image: Porm       Field type*         State       State         Image: Custo       Field name*	
<ul> <li></li> <li><td>Delete Optional hint</td><td></td></li></ul>	Delete Optional hint	
!		
(i) (i)	Add new option	
	Cancel OK	

To add new options, click the **Add option** button and type the text for this option.

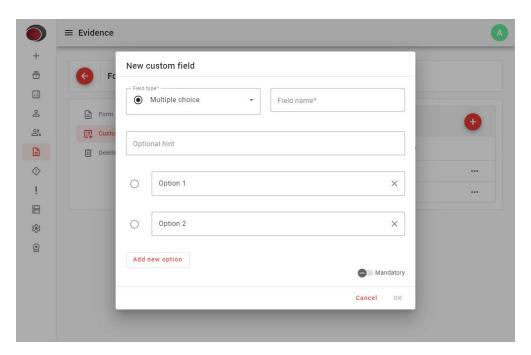
Fc Fc	New custom field	
	Field type* ✓= Checkboxes ✓ Field name*	
Form	Field name*	
Custo	Г	
🔟 Delete	Optional hint	
	Option 1	×
	Option 2	×
	Option 3	×
	Add new option	
		Mandatory
		Cancel OK

#### 12.5.1.8 Multiple choice

A field with several options where only one of them can be selected.

	≡ Evidence
+	
Ē	FC New custom field
r:I	- Field type*
Do	Form Multiple choice
Ő	E Custo
	Delete Optional hint
$\Diamond$	
1	Option 1
(j)	Add new option
) I	Common Mandatory
	Cancel OK

To add new options, click the **Add option** button and type the text for this option.



## 12.5.1.9 Dropdown

A field with multiple options where only one of them can be selected from a drop-down list.

$\bigcirc$	≡ Evidence
+	
ē	FC New custom field
De Do	E Form Field type*
•	Delete Optional hint
!	1. Option 1
\$\$ Q	Add new option
	Cancel OK

To add new options, click the **Add option** button and type the text for this option.

	$\equiv$ Evidence	
+		New custom field
ē	🗲 Fc	
		Field type* ✓ Dropdown ▼ Field name*
Do	🖹 Form	
00	E Custo	
	🔟 Delete	Optional hint
$\diamondsuit$		· · · · · · · · · · · · · · · · · · ·
i		1. Option 1 X
(i)		2. Option 2 X
٢		
		Add new option
		Mandatory
		Cancel OK

### 12.5.1.10 URL

A field where a URL must be provided. When viewing an incident, links can be clicked to open in the browser.

+ = :: 2 2 1	Form 1  Field type*  URL  Field name*  Field name*	
<ul><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li><li></li></ul> <li></li> <li></li>	Optional hint	
Q	Cancel OK	

#### 12.5.1.11 Location

A geographic location field. When filling out, the user can select the location on a map or search by address.

Form 1  New custom field  Field type*  Location  Field name*  Optional hint  Optional hint  Cancel OK	Evic	dence	
Image: Second	-	For	m 1
Image: Delete     Image: Delete       Image: Delete     I		Form	New custom field
Detete Optional hint	s 📮	Custo	
Optional hint		Delete	
Mandatory			
Mandatory			•••
			Mandatory
			Cancel ОК
	9		

#### 12.5.1.11.1 Filling in the location field

When filling out an incident, if this field is available, it will be displayed as follows:

To select a location, click the button  $\heartsuit$ .

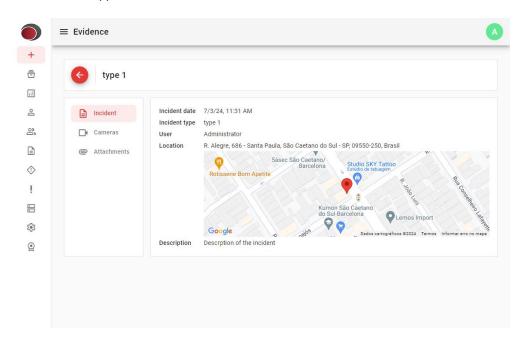
$\bigcirc$	≡ Evidence		
+	Conclus Incident type type 1	Select location from map Address* R. Alegre, 686 - Santa Paula, São Caetano do Sul - SP, 09550-250, Brasil	•
aî ∎ ♦	Priority Short text	Mapa Satélite	•
11 \$\$ Q	Location Incident d	Bio de James o Jone de Carlos de Car	⊘

You can search for an address in the text field. With the auto-complete feature you can complete the address selection with the up or down arrows on the keyboard or by clicking on a suggestion with the mouse.

You can also select an address by double-clicking on the map. The corresponding address will be automatically filled in.

#### 12.5.1.11.2 Viewing a location field

Location custom fields appear in an incident view as follows:



## 12.5.2 Adding custom fields

To add custom fields, first click the Custom Fields button located in the side menu of a form.

Form 1					
Form	Custom fiel	ds Q Sear	ch		Œ
Custom fields	_				
🔟 Delete		Field name	Field type	Mandatory	
	= 🗆	Short text	- Short text		••
	= 🗆	Location	O Location		

Once done, click the button 💜 to add a new custom field.

≡ Evide	ence	
¢	Fc New custom field	
	Form Field type* Field name*	
圓	Custo	
Ū	Delete Optional hint	•
	Field validation	••
	Minimum length*	-
	Mandatory	
	Cancel ОК	

- Field type: See the topic Custom fields.
- Field Name: This will be the text that identifies this field when filling out the incident.
- **Optional hint:** An optional text that describes the purpose of the field. This text will be displayed to the operator when completing the incident.
- Field validation: Some field types allow you to add validations. See the topic Custom fields.
- **Mandatory:** Mark the field as mandatory. A field marked as mandatory must be filled in by the operator when adding an incident. If it is not filled in, the incident cannot be saved.

## 12.5.3 Modifying custom fields

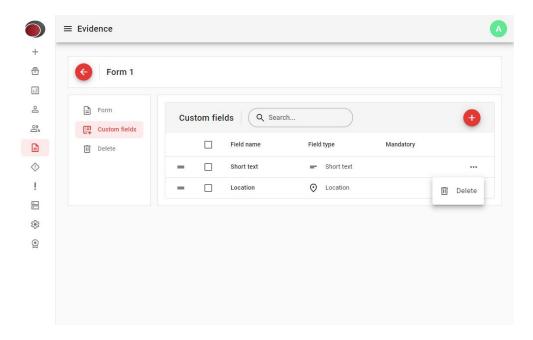
To change custom fields, click the name of the field you want to modify.

Field type*
E Custo
Delete Optional hint
Field validation
Minimum length* Maximum length*
Contraction Mandatory

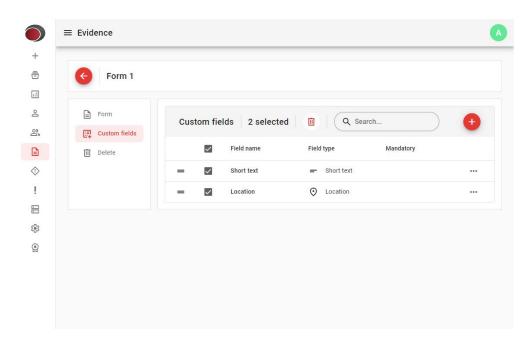
## 12.5.4 Deleting custom fields

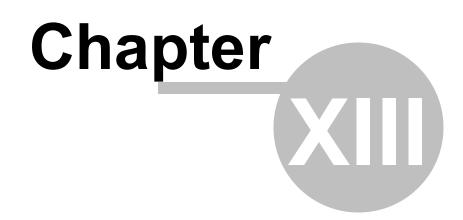
When deleting a custom field, it will no longer be available for filling incidents, but all incidents created with this field will be preserved.

To delete custom fields, click the 3-dot button on the right and then the Delete button.



You can also use checkboxes to remove more than one field at the same time. Select the fields to remove and then click





# 13 Incident types

Incident types are used to categorize incidents and provide functionality while filling in the incident form. Incident types can be chained hierarchically, working as categories, and have associated forms. This configuration will determine which items can be selected by the user when filling out incidents, according to the rules below:

- Items that have children can only be selected if there is an associated form. Otherwise, the user must select an available child.
- Items at the last levels of the hierarchy can always be selected, whether there is an associated form or not.

See the example below:

+	≡ Evidence				4
ē	Incident types	Q Search			•
<u>ا</u> ا	□ Name ↑	Description	Priority	Form	
	Incident type 1		High		
5	Incident type 2		High	Form 1	•••
,	Incident type	3	Medium		
	Inciden <sup>®</sup>	t type 4	Low	Form 2	
	Incident type 5			Form 3	
	Incident type	6		Form 3	•••
2					

- **Incident type 1** can be selected as it does not have children. As there is no associated form, only the standard fields will be displayed for filling in the incident form.
- Incident type 2 can be selected, because despite having children, it has an associated form. The custom fields from the Form 1 will be displayed for you to fill out.
- Incident type 3 cannot be selected because it has children and does not have an associated form.
- Incident type 4 can be selected as it does not have children. The custom fields from the Form 2 will be displayed for you to fill out.
- Incident type 5 can be selected, because despite having children, it has an associated form. The custom fields from the Form 3 will be displayed for you to fill out.
- Incident type 6 can be selected as it does not have children. The custom fields from the Form 3 will be displayed for you to fill out.

## **13.1** Accessing the incident types module

In the side menu, click on the Incident types option to access the module.

74	Evidence					
	-					
		Evidence				A
	+ New incident					
	= Incidents	Incident types	Q Search			•
	Analytics	□ Name ↑	Description	Priority	Form	-
	<b>2</b> Users		Description	Flonty	rom	
	Oser groups					
	Forms					
	Incident types					
	Priorities					
	Digifort servers					
	System settings					
	Q Licensing					

## 13.2 Adding incident types

Para adicionar tipos de incidentes, clique no botão 😷.

New incident type	
Name*	
Description	
Parent incident type	
Priority	
You can optionally assign a pre-defined priority to every incident created with this type	
Form	

- **Name:** Name of the incident type.
- **Description:** An optional description.
- **Parent incident type:** Incident types can be chained together to help in categorizing and organizing incidents.
- **Priority:** You can optionally associate a priority for each incident created with this type. If a priority is not associated with the incident type, the user can choose a priority when filling out the incident.
- Form: You can optionally associate a form with the incident type. If a form is associated, the form's custom fields will be displayed for completion.

After filling in all the necessary data, click the **Save** button. You will be automatically redirected to the change page. See the topic <u>Modifying incident types</u>.

## 13.3 Modifying incident types

+			
5	Incident typ	e 1	
<u></u>		- Name*	
2	Incident types	Incident type 1	
2	🔟 Delete		
Đ		Description	
♦		Description	
!			
		Parent incident type	
		- Priority	
		High	
<b>Q</b>		You can optionally assign a pre-defined priority to every incident created with this type	
		Form	
		Form 1	

To change incident types, click the name of the incident type you want to modify,

On the left side there is a menu where more settings can be made.

- Incident type: Allows you to modify the main data of the incident type.
- Delete: Removes the incident type from the system. See the topic Deleting incident types.

## 13.4 Deleting incident types

When you delete an incident type, it will no longer be available for selection when populating incidents, but all incidents created with that incident type will be preserved.

To delete, click the **Delete** button, as shown in the image below:

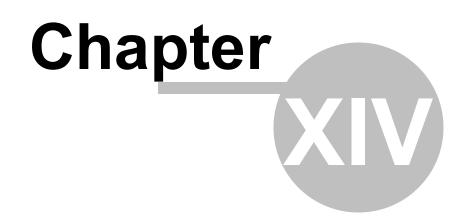
Incident typ	le 1	
Incident types	Name*	
-	Incident type 1	
Delete		
	Description	
	Parent incident type	
	L	
	Priority High	
	You can optionally assign a pre-defined priority to every incident created with this type	
	Form 1	

Another way to exclude is by registering incident types. Next to each item there is a three-dot button with the option to remove it.

You can also use check boxes to remove more than one item at the same time. Select the items to be

removed and then click 🔟.

Incident types 2 sei	Incident types 2 selected 🔟 Q Search				
Name 🛧	Description	Priority	Form		
Incident type 1		High	Form 1		
type 1			Form 1		



## 14 Incidents

O módulo de incidentes é o recurso que será utilizado no dia a dia pela maioria dos usuários. É neste módulo onde formulários de incidentes serão preenchidos.

## 14.1 Registering incidents

To register incidents, locate the **New incident** item in the side menu.

		≡ Evidence	
+	New incident		
ō	Incidents	New incident	
.:l	Analytics		
Do	Users	Date and time*	
Do	User groups	1/0/2024	
Đ	Forms	Conclusion date	
$\Diamond$	Incident types		
i	Priorities	Incident type*	
•	Digifort servers		
ŝ	System settings	Priority	
٢	Licensing		
		Incident description*	

The incident form has some standard fields, which will always be displayed for completion regardless of whether there is a form associated with the type of incident to be selected:

- Date and time: Select the date and time of the incident. This date should represent the actual date of the incident.
- Conclusion date: You can optionally assign the incident conclusion date during completion, if it is known. Otherwis
- Incident type: When selecting an item, the custom form fields associated with the incident type, if any, will be disp
- Priority: Priority of the incident. This field will be disabled if a priority is associated with the selected incident type. S
- Incident description: Description of the incident.
- Additional notes: An optional auxiliary text.

After filling in all the necessary fields, click the Save button. You will be redirected to the incident view page. See the t

### 14.2 Searching for incidents

To search for incidents, click the Incidents button, located in the side menu.

- New incident							
j Incidents	Incidents					Ŧ	Ð
Analytics	□ Date ↓	Conclusion date	Incident type	Priority			
Users User groups	7/4/24, 2:48 PM		Incident type 5 > Incident type 6	Low	E	Ø	
Forms	7/4/24, 2:48 PM		Incident type 2 > Incident type 3	🗖 Medium			
Incident types	7/4/24, 2:48 PM		Incident type 2 > Incident type 3	Medium			
Priorities	7/4/24, 2:46 PM		Incident type 1	High			
Digifort servers	7/3/24, 11:31 AM		Incident type 2				
System settings	7/2/24, 5:26 PM		Incident type 2				
Licensing			Items per page: 10	▼ 1 - 6 of 6			

This page lists all incidents created. You can filter the list of incidents by clicking the button  $\overline{\phantom{a}}$ . The filter menu will appear on the right. Select the desired filters and click the button **Apply filter**.

Incidents				ξ 🛨	Filters	
□ Date ↓	Conclusion date	Incident type	Priority	-	Date and time	<b></b>
7/4/24, 2:48 PM		Incident type 5 >	E Low		7/1/2024 - 7/31/2024	•
7/4/24, 2:48 PM		Incident type 2 > Incident type 3	🥅 Medium		- Start time	- End time
7/4/24, 2:48 PM		Incident type 2 > Incident type 3	🗖 Medium		00:00	23:59
7/4/24, 2:46 PM		Incident type 1	High			
7/3/24, 11:31 AM		Incident type 2			Conclusion date and time	
7/2/24, 5:26 PM		Incident type 2		E 2 ···	Incident's description	Ē ,
		Items per page:	10 👻 1 - 6 of 6		Incident's notes	
					Incident types	. ⊘
					Priorities	1 -
					Users	٤ ،
					Арр	ly filter
	Date ↓           7/4/24, 248 PM           7/4/24, 248 PM           7/4/24, 248 PM           7/4/24, 246 PM	Date ↓         Conclusion date           7/4/24, 248 PM         7/4/24, 248 PM           7/4/24, 248 PM         7/4/24, 248 PM	Date 4         Conclusion date         Incident type           7/4/24, 2:48 PM         Incident type 5         Incident type 5           7/4/24, 2:48 PM         Incident type 3         Incident type 3           7/4/24, 2:48 PM         Incident type 3         Incident type 3           7/4/24, 2:48 PM         Incident type 3         Incident type 3           7/4/24, 2:46 PM         Incident type 1         Incident type 1           7/4/24, 2:46 PM         Incident type 1         Incident type 1           7/3/24, 11:31 AM         Incident type 2         Incident type 2           7/2/24, 5:26 PM         Incident type 2         Incident type 2	Date 4.         Conclusion date         Incident type         Priority           7/4/24, 2:48 PM         Incident type 3         Low           7/4/24, 2:48 PM         Incident type 3         Medium           10:dident type 3         Incident type 3         Medium           10:dident type 3         Medium         Incident type 3         Medium           10:7/4/24, 2:46 PM         Incident type 1         High           10:7/4/24, 2:46 PM         Incident type 1         High           10:7/3/24, 11:31 AM         Incident type 2         Incident type 2           10:7/2/24, 5:26 PM         Incident type 2         Incident type 3	Date 4.         Conclusion date         Incident type         Priority           7/4/24, 248 PM         Incident type 5         Low         •••           7/4/24, 248 PM         Incident type 5         Medium         •••           7/4/24, 248 PM         Incident type 2         •••         Medium         •••           7/4/24, 248 PM         Incident type 3         •••         Medium         •••           7/4/24, 248 PM         Incident type 2         •••         •••           7/4/24, 248 PM         Incident type 3         •••         Medium         •••           7/4/24, 248 PM         Incident type 3         •••         Medium         •••           7/4/24, 248 PM         Incident type 2         •••         •••         •••           7/4/24, 248 PM         Incident type 2         •••         •••         •••         •••           7/4/24, 248 PM         Incident type 2         •••         •••         •••         •••           7/3/24, 11.31 AM         Incident type 2         •••         •••         •••         •••           10.         7/2/24, 526 PM         Incident type 2         •••         •••         •••	Incidents       Image: Conclusion date       Incident type       Priority <ul> <li>7/4/24, 248 PM</li> <li>Incident type 3</li> <li>Medium</li> <li>7/4/24, 248 PM</li> <li>Incident type 2</li> <li>Medium</li> <li>7/4/24, 248 PM</li> <li>Incident type 3</li> <li>Medium</li> <li>7/4/24, 248 PM</li> <li>Incident type 2</li> <li>Medium</li> <li>7/3/24, 1131 AM</li> <li>Incident type 2</li> <li>Image: Image: Image:</li></ul>

To view an incident, position the mouse over the desired item and click the button  $\square$ , or the button  $\square$  to open in a new browser window. See the topic <u>Viewing incidents</u>.

#### 14.2.1 Marking incidents as concluded

Incidents can be marked as concluded to help with traceability.

An incident can be created with its completion date already filled in, see the topic <u>Registering incidents</u>. If the incident does not yet have a completion date, position the mouse over the desired item, click on the 3 dots icon and then **Mark as concluded**.

New incident						
Incidents	Incid	lents				. ₹ 🕂
Analytics		Date 🕁	Conclusion date	Incident type	Priority	
User groups		7/4/24, 2:48 PM		Incident type 5 Incident type 6	Low	e 2
) Forms		7/4/24, 2:48 PM		Incident type >	🗖 Medium	Set as concluded
<ul> <li>Incident types</li> <li>Priorities</li> </ul>		7/4/24, 2:48 PM		Incident type 2 > Incident type 3	🗖 Medium	🔟 Remove
Digifort servers		7/4/24, 2:46 PM		Incident type 1	📕 High	•••
System settings		7/3/24, 11:31 AM		Incident type 2		•••
Licensing		7/2/24, 5:26 PM		Incident type 2		
			Ite	ems per page: 10 👻	1 - 6 of 6	

A window will open to set the date and time.

	≡ Evidence	A
+ New incident		
🖶 Incidents	Incidents	₹ 🕂
Analytics	Date      Conclusion     Incident type     Priority	
<b>&amp;</b> Users	Set incident as concluded	
와 User groups		▤ ◪ …
Forms	Date*         Time*           7/4/2024         15:02	
Incident types	M/D/YYYY	
Priorities		
Digifort servers	Cancel OK	
System settings	7/3/24, 11:31 AM Incident type 2	
Licensing	7/2/24, 5:26 PM Incident type 2	
	Items per page: 10 👻 1 - 6 of 6	

## 14.2.2 Deleting incidents

To delete incidents, position the mouse over the desired item, click the button \*\*\* and then **Delete**.

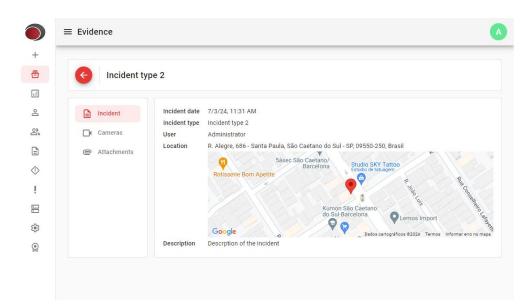
In	cide	ents				. ₹ 🕂
	]	Date ↓	Conclusion date	Incident type	Priority	
	]	7/4/24, 2:48 PM	7/4/24, 3:02 PM	Incident type 5 > Incident type 6	Low	
	]	7/4/24, 2:48 PM		Incident type 2 > Incident type 3	🗖 Medium	
	]	7/4/24, 2:48 PM		Incident type 2 > Incident type 3	Medium	
	]	7/4/24, 2:46 PM		Incident type 1	High	e 7
	]	7/3/24, 11:31 AM		Incident type 2		Set as concluded
C	]	7/2/24, 5:26 PM		Incident type 2		🔟 Remove
				Items per page: 10		1< < >

The system will request the Administrator user password.

Incidents				Ŧ	Ð
□ Date ↓	Conclusion date	Incident type	Priority		
Remove incid	dent				
-	s operation, please enter 1	the password of the Adr	ninistrator user		
Password*					
Enter the passwor	rd of the Administrator user			EĽ	;
			0		
77 2/ 24, 3.20 FM		incluent type 2	Cancel OK		
		Items per page: 10	▼ 1 - 6 of 6		

# 14.3 Viewing incidents

On the incident view page you will be able to see the completed form, add cameras to attachments.



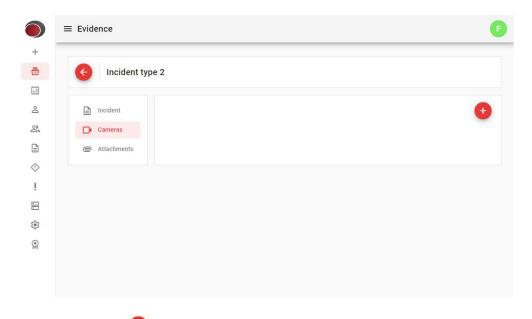
#### 14.3.1 Managing cameras

Videos of cameras can be imported from Digifort automatically by simply selecting the desired server and cameras.

The system will start a process of importing the camera video in parallel in .mp4 format. The user will be able to leave the page while the video is being imported.

#### 14.3.1.1 Adding cameras to incidents

To add cameras to the incident, click the Cameras button in the side menu.



Once done, click the button 💆 to add a camera. A screen listing cameras from all registered servers will be displayed. Servers must be previously registered. See the ser topic Digifort servers.

≡ Evidence			
e In	Add cameras to the incide	nt	
E Incide	Cameras 1 selected	Q Search	
Came	Name 🛧	Description	Server
@ Attack			- 10 548 518
	01	Client parking	Local
	40	Dome Entrada	Local
	Items per page:	10 💌 1 - 2 of 2	IK K > >I
			Cancel OK

Select the desired camera using the checkboxes and confirm. A second screen will appear to customize the video import:

+		Add camera do the incident	
5	🧲 In	Aug camera do tre incluent	
1		<b>□</b> ( 40	
2	🖹 Incide	Dome Entrada	
)	Came	🛱 3 de jul. de 2024, 11:31	
	@ Attact	Constant Con	
>		Date range* 7/3/2024 - 7/3/2024	
		110/2024 110/2024	
		Start time* End time*	_
3		11:31 11:36	
2			_
2			
		Optional description	
			1
		Cancel	ок

Use the option **Download video from Digifort** to define whether the video should be imported or not. If this option is unchecked, the system will only add a link to the camera and the video will not be imported.

- Date Range: Select the date range of the video to be imported.
- Start time: Select the start time of the import.
- End time: Select the end time of the import.
- Optional Description: Add an optional description.

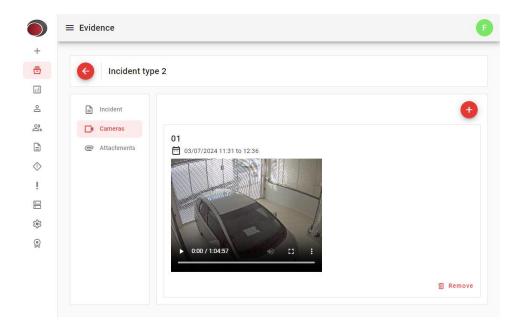
# Important

• The start date and time must be greater than or equal to the incident date.

Repeat this operation if you want to add more cameras.

#### 14.3.1.2 Viewing cameras

To view imported cameras, click the **Download** button. The file will be transferred and once complete, it will be played.

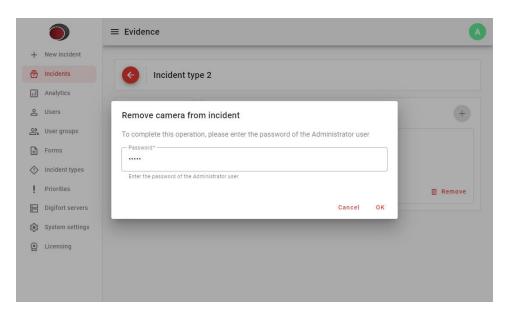


#### 14.3.1.3 Deleting cameras

To remove incident cameras, click the **Delete** button.

	≡ Evidence		ſ
+	Central Incident type	be 2	
∘0 °0 ⊡ ♦	<ul> <li>Incident</li> <li>Cameras</li> <li>Attachments</li> </ul>	01 ☐ 03/07/2024 11:31 to 12:36 ★ Download	0
> ! @			🗑 Remove
¥			

The system will request the Administrator user password.



#### 14.3.2 Managing attachments

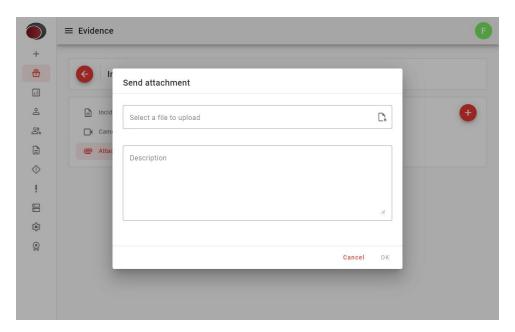
Attachments are files that can be added to incidents, such as documents, images and videos.

#### 14.3.2.1 Adicionando anexos

To add attachments to the incident, click the Attachments button in the side menu.

	≡ Evidence	•
+		
ē	Incident type 2	
.:1		
Do	E Incident	•
Do	Cameras	
	@ Attachments	
$\Diamond$		
i		
<b>1</b>		
۲		
OI		

Once done, click the button. 😌. A screen will appear to select the file and add an optional description.



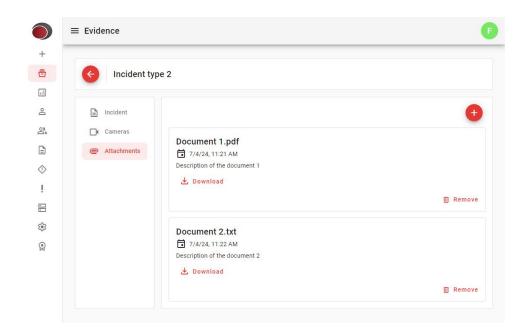
#### 14.3.2.2 Downloading attachments

To download and view attachments, click the **Download** button.

$\equiv$ Evidence		
Incident type	De 2	
🖹 Incident		e
Cameras	Document 1.pdf	
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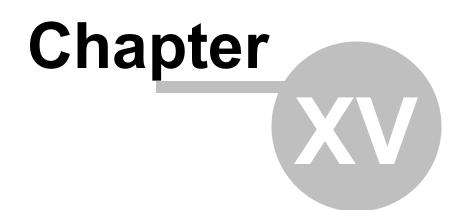
#### 14.3.2.3 Deleting attachments

To remove incident attachments, click the **Delete** button.



The system will request the Administrator user password.

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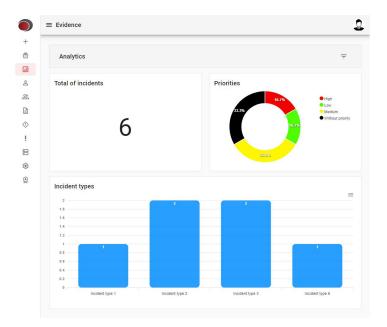


# 15 Analytics

The Analytics module is an essential tool for visualizing and analyzing incident data clearly and effectively. This module provides detailed statistical charts that help users understand trends, identify patterns, and make informed decisions based on the information collected.

## 15.1 Accessing the analytics module

In the side menu, click on the Analytics option to access the module.



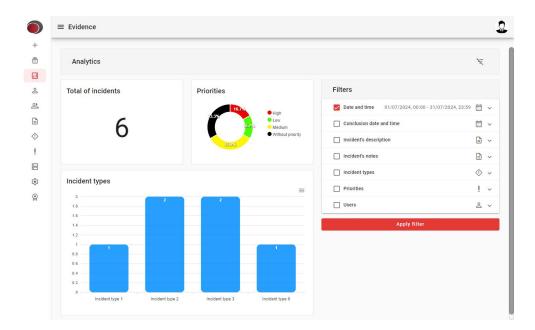
This dashboard is divided into 3 areas:

- Total incidents: Displays the total number of incidents created
- Priorities: Displays a pie chart with the percentage of incidents for each priority.
- Incident types: Displays a bar graph with the number of incidents of each type.

## **15.2 Filtering incidents**

Various filters can be applied to personalize data display, allowing for more accurate and relevant analysis according to needs. This includes the ability to filter by dates, types of incidents, priorities, status, among other criteria.

To open the filters panel, click the button  $\overline{=}$ .



Select the desired filters and click the Apply filter button.