Mustering Service Instructions **v1.3 - Dec 12, 2018**

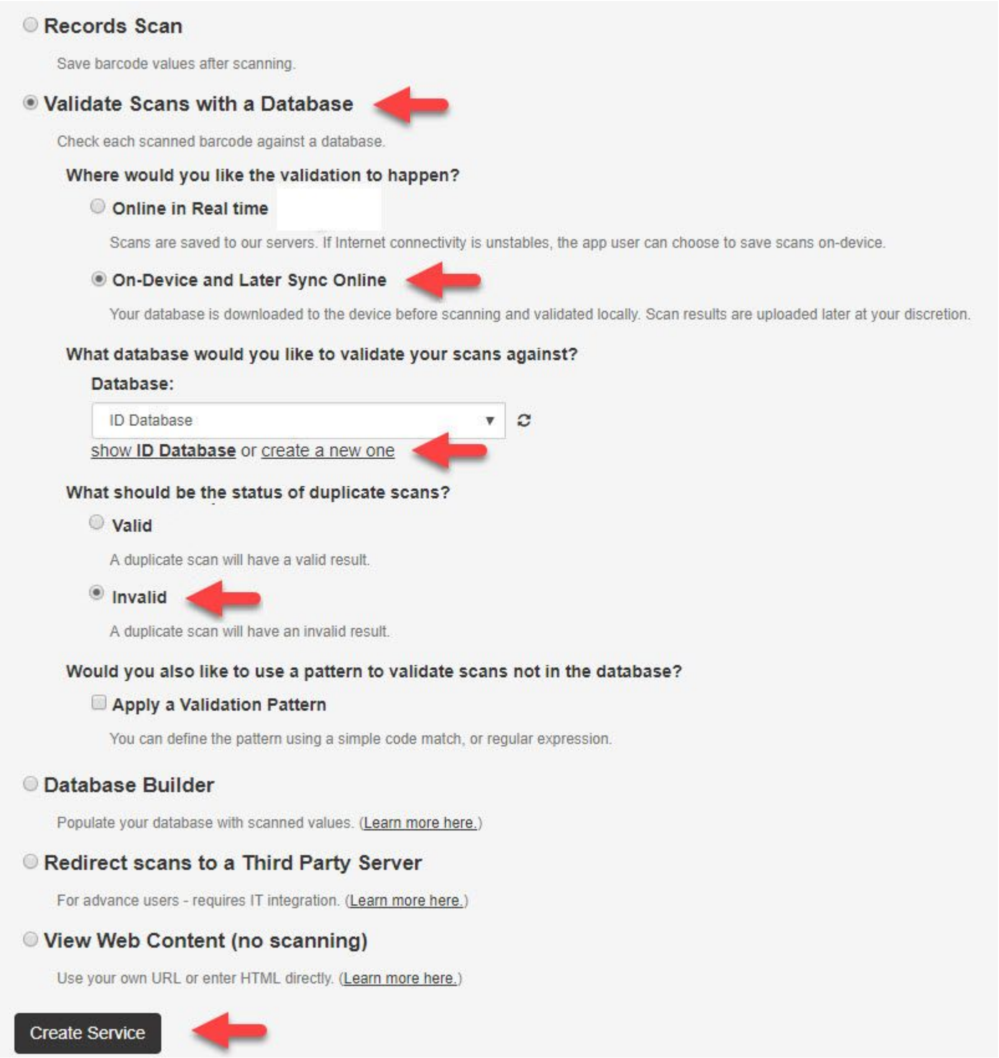
1 - By using the codeREADr web services and mobile apps you agree to the standard Terms of Service.

2 - If you need help, please email us or use our website's Chat Now option. We also offer a consulting option to build and train clients, including alternative ways to meet your needs. Please contact support@codeREADr.com for documentation.

A. Create Service

Step 1 - Service Type

You will need to set up a Validate Scans service type for on-device (offline) scanning with Auto Sync. Sign into the codeREADr website. Navigate to the **Services** page. Select **Create a Service** and then select these options in the screenshot below:



○ **Records Scan**

Save barcode values after scanning.

● **Validate Scans with a Database**

Check each scanned barcode against a database.

Where would you like the validation to happen?

○ **Online in Real time**

Scans are saved to our servers. If Internet connectivity is unstables, the app user can choose to save scans on-device.

● **On-Device and Later Sync Online**

Your database is downloaded to the device before scanning and validated locally. Scan results are uploaded later at your discretion.

What database would you like to validate your scans against?

Database: ID Database

show **ID Database** or create a new one

What should be the status of duplicate scans?

○ **Valid**

A duplicate scan will have a valid result.

● **Invalid**

A duplicate scan will have an invalid result.

Would you also like to use a pattern to validate scans not in the database?

□ **Apply a Validation Pattern**

You can define the pattern using a simple code match, or regular expression.

○ **Database Builder**

Populate your database with scanned values. (Learn more here.)

○ **Redirect scans to a Third Party Server**

For advance users - requires IT integration. (Learn more here.)

○ **View Web Content (no scanning)**

Use your own URL or enter HTML directly. (Learn more here.)

Step 2 - Name the Service
You can name this app anything you want and change it at any time. A description can be added for instructions, if necessary.

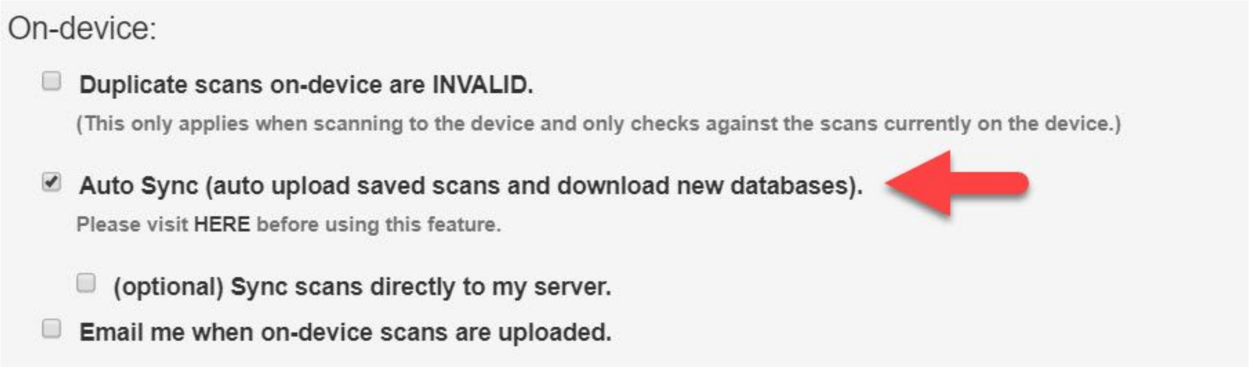
Step 3 - Add Users
These are your ”app-users’ - team members authorized to scan during emergencies. You can have one app username for all app-users, or create usernames for a group of app-users (location, etc.), or create a specific username for each person. You should create at least one new username in addition to your account email.

Step 4 - Add Questions
Skip this step unless you want your app-users to collect additional information after a scan. That’s generally not recommended for mustering because it will slow down the scanning process.

Step 5 - Advanced Options

- **Sync settings**

This will sync scans to our server (or to your server) in the background without interrupting your app-user.



On-device:

□ **Duplicate scans on-device are INVALID.**
(This only applies when scanning to the device and only checks against the scans currently on the device.)

☑ **Auto Sync (auto upload saved scans and download new databases).**
Please visit **HERE** before using this feature.

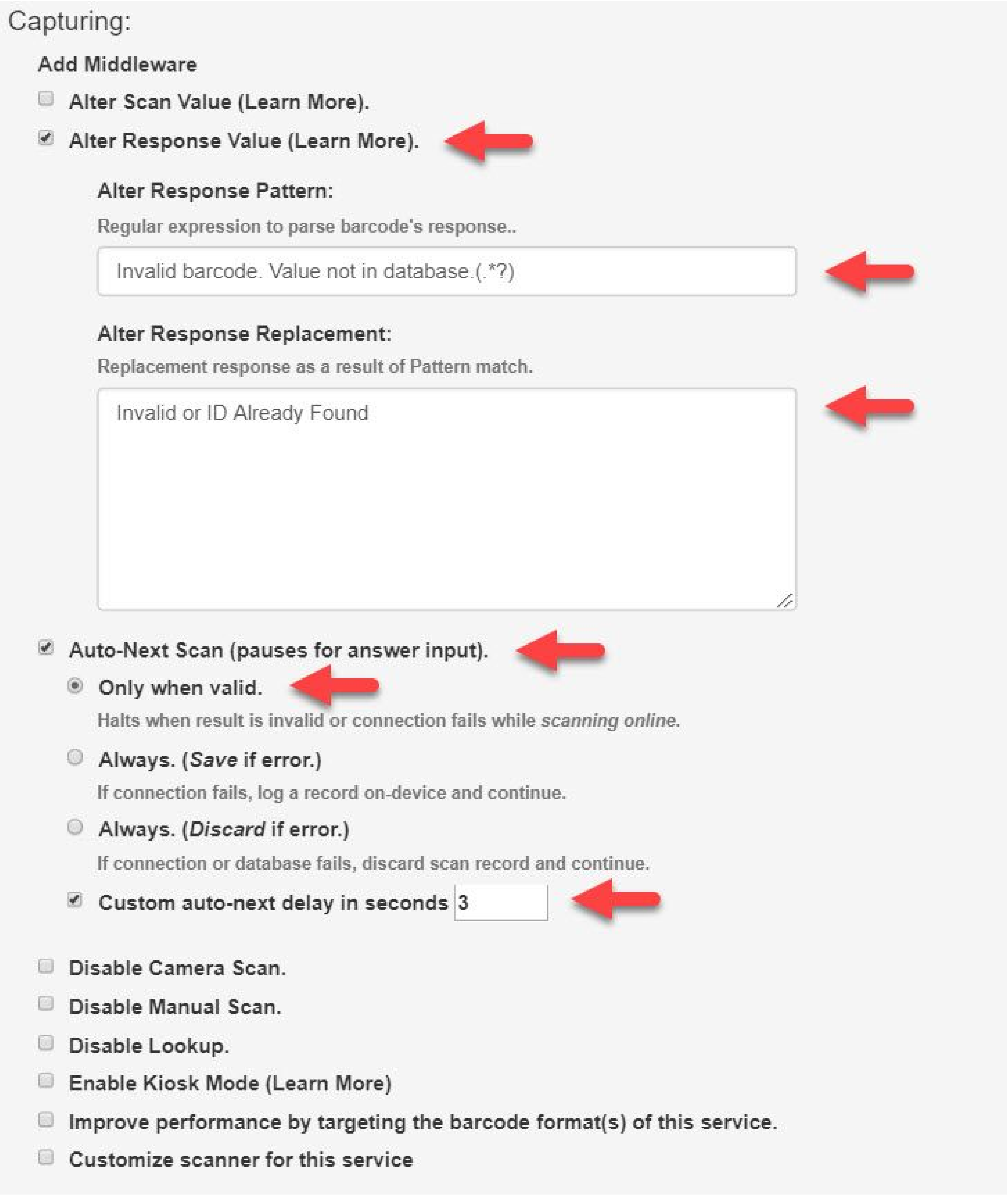
□ **(optional) Sync scans directly to my server.**

□ **Email me when on-device scans are uploaded.**

- **Capturing settings**

Auto-Next Scan is for auto-opening the camera for fast, consecutive scanning.

This “Alter Response” setting is to change the standard response to an invalid scan where the ID holder may have already been found or the app-user scanned something other than an ID. We suggest using “Invalid or ID already Found” but you can use any text you want.



Capturing:

Add Middleware

☐ Alter Scan Value (Learn More).

☑ Alter Response Value (Learn More).

Alter Response Pattern:

Regular expression to parse barcode's response..

Invalid barcode. Value not in database.(.*?)

Alter Response Replacement:

Replacement response as a result of Pattern match.

Invalid or ID Already Found

☑ Auto-Next Scan (pauses for answer input).

● Only when valid.

Halts when result is invalid or connection fails while *scanning online*.

○ Always. (*Save* if error.)

If connection fails, log a record on-device and continue.

○ Always. (*Discard* if error.)

If connection or database fails, discard scan record and continue.

☑ Custom auto-next delay in seconds 3

☐ Disable Camera Scan.

☐ Disable Manual Scan.

☐ Disable Lookup.

☐ Enable Kiosk Mode (Learn More)

☐ Improve performance by targeting the barcode format(s) of this service.

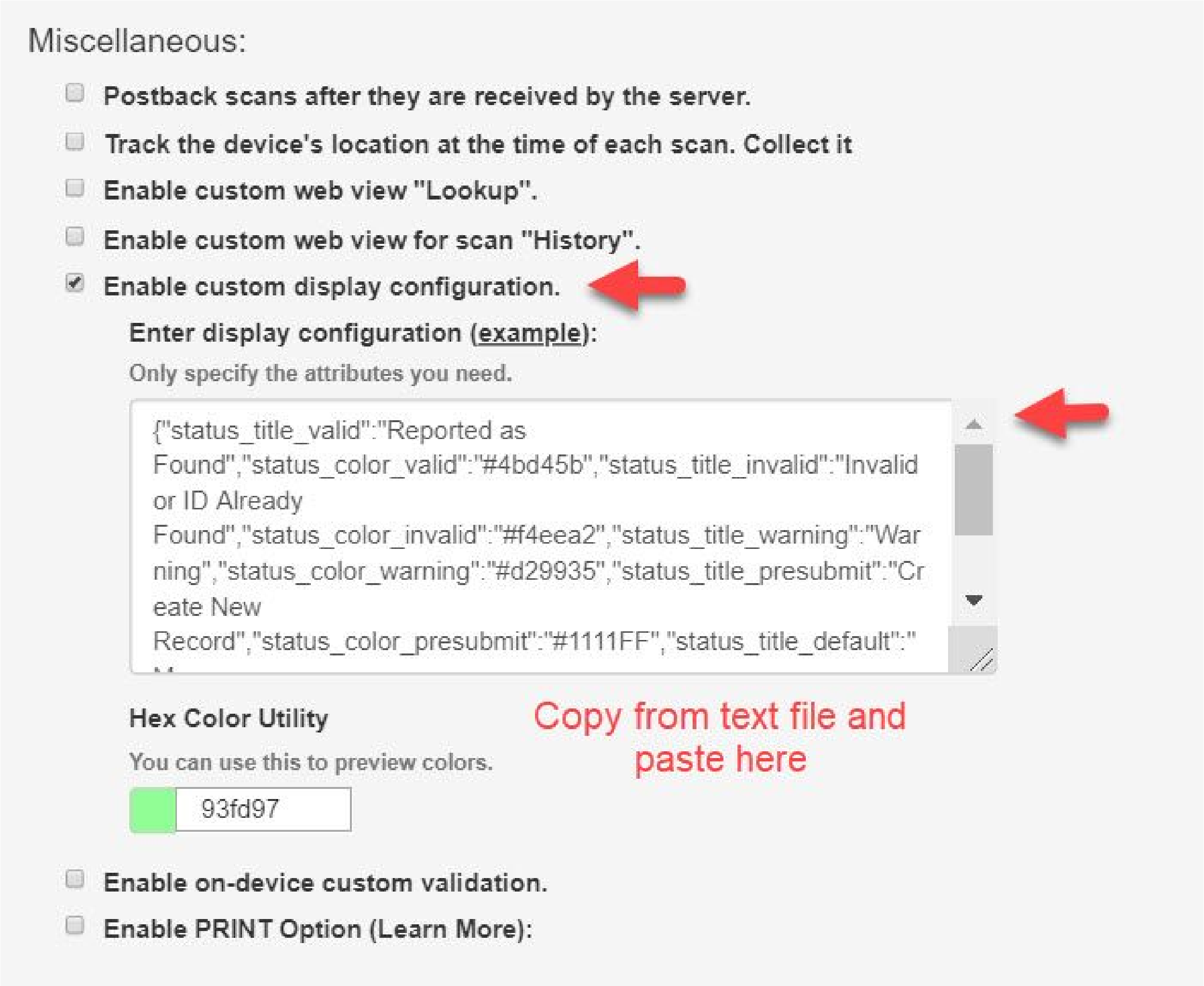
☐ Customize scanner for this service

Note: The Auto-Next delay between scans can set to a shorter or or longer interval.

- **Miscellaneous settings**

a) “Track the device’s location at the time of each scan” is an option is you feel it’s necessary to track the GPS location of each scan. If you do, we suggest selecting the option to collect it in the background so there’s no interruption of the app-user when scanning.

b) The “Custom Display Configuration” setting creates custom labels for the responses after a scan. We offer the following suggestions but you can edit as needed.



Miscellaneous:

☐ Postback scans after they are received by the server.

☐ Track the device's location at the time of each scan. Collect it

☐ Enable custom web view "Lookup".

☐ Enable custom web view for scan "History".

☑ Enable custom display configuration.

Enter display configuration (example):

Only specify the attributes you need.

```
{"status_title_valid":"Reported as Found","status_color_valid":"#4bd45b","status_title_invalid":"Invalid or ID Already Found","status_color_invalid":"#f4eea2","status_title_warning":"Warning","status_color_warning":"#d29935","status_title_presubmit":"Create New Record","status_color_presubmit":"#1111FF","status_title_default":"
```

Hex Color Utility

You can use this to preview colors.

🟩 93fd97

Copy from text file and paste here

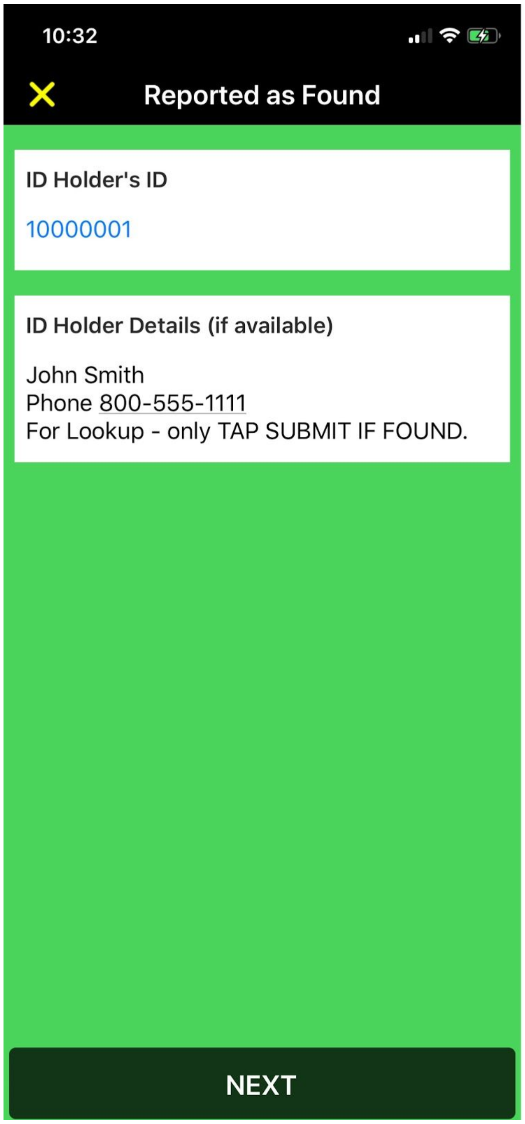
☐ Enable on-device custom validation.

☐ Enable PRINT Option (Learn More):

Here is the text to paste:

```
{
  "status_title_valid":"Reported as Found",
  "status_color_valid":"#4bd45b",
  "status_title_invalid":"Invalid or ID Already Found",
  "status_color_invalid":"#f4eea2",
  "status_title_warning":"Warning",
  "status_color_warning":"#d29935",
  "status_title_presubmit":"Create New Record",
  "status_color_presubmit":"#1111FF",
  "status_title_default":"My Record",
  "status_color_default":"#54545",
  "status_icon_hidden":"true",
  "value_label":"ID Holder's ID",
  "response_label":"ID Holder Details (if available)"
}
```

This is the resulting in-app views of scans using the above suggestions:



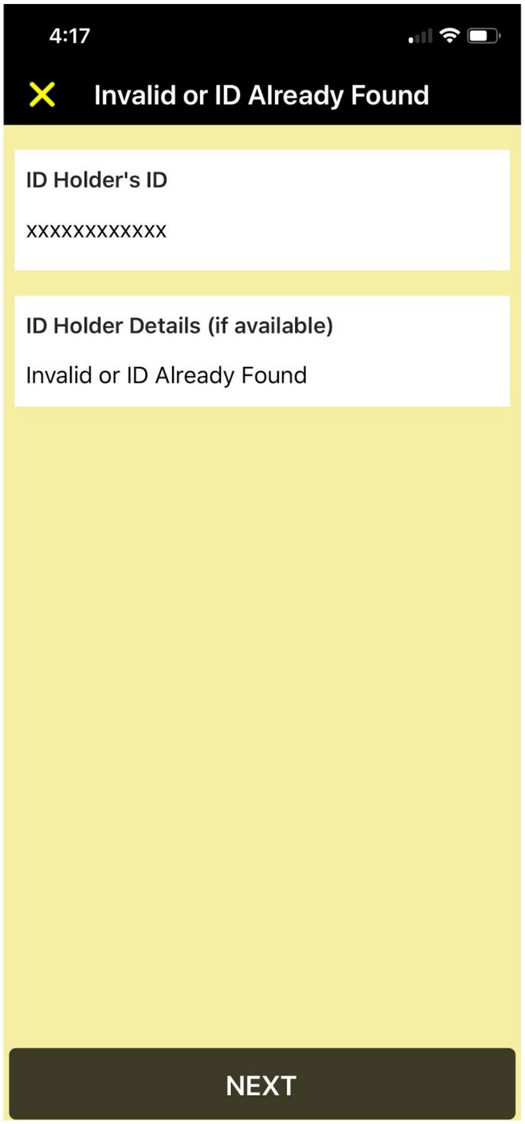
Reported as Found

ID Holder's ID

10000001

ID Holder Details (if available)

John Smith
Phone 800-555-1111
For Lookup - only TAP SUBMIT IF FOUND.



Invalid or ID Already Found

ID Holder's ID

xxxxxxxxxxxx

ID Holder Details (if available)

Invalid or ID Already Found

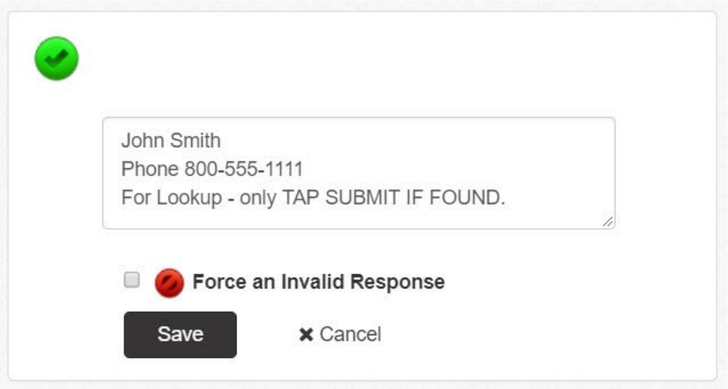
B. Create a Database

The Database page is where you upload your IDs and associated data and where you create shareable web views for others to help manually **track who's unaccounted for**.

1 - Navigate to the Databases page on the codeREADr website. Select the previously named database that's associated to the musering service you created.

To start we suggest manually creating a few test IDs and responses. If appropriate, we suggest you include the ID holder's name, phone number and any other pertinent information in the response text.

Why include a phone number? Because when your app-users have finished scanning IDs, they can filter the app's Lookup option to see who's unaccounted for ("Unscanned") and then tap the phone number to call the ID-Holder. See "How App-Users use Lookup" below.



John Smith
Phone 800-555-1111
For Lookup - only TAP SUBMIT IF FOUND.

☐ Force an Invalid Response

In the above screenshot you'll see the Barcode Value 0000000001 (the ID) and the Response Text (Name, Phone number and optional Lookup instructions).

2- Upload CSV file of ID holders. The file would look like this:

0000000001	John Smith PHONE 800-555-1111 For Lookup - only TAP SUBMIT IF FOUND.	1
0000000002	Jane Doe PHONE 800-555-2222 For Lookup - only TAP SUBMIT IF FOUND..	1
0000000003	Tom Jones PHONE 800-555-3333 For Lookup - only tap SUBMIT IF FOUND.	1

For the Response text in column 2 you would concatenate data from other columns into column 2. Here we show data on separate lines but you could also use other delimiters (comma, etc.).

3 - Update and Sync Database for “Currently-Present” IDs (if available)

a. The best resource is a list (database) of ID holders currently present at the start of a mustering event. That could be a real-time list if integrated using our API (or an API connector like Zapier. Or a list that is manually uploaded to our server one or more times each day. It only takes a few seconds to manually upload a database.

b. If a currently-present list is not available for logistic reasons, then a master list of all IDs is a good alternative.

c. When an app-user scans an ID, that scan status is saved against the Service, not the Database. Why is that important? Because you can update the database as needed without affecting the existing scan records. **See “Editing Disposition List” below.**

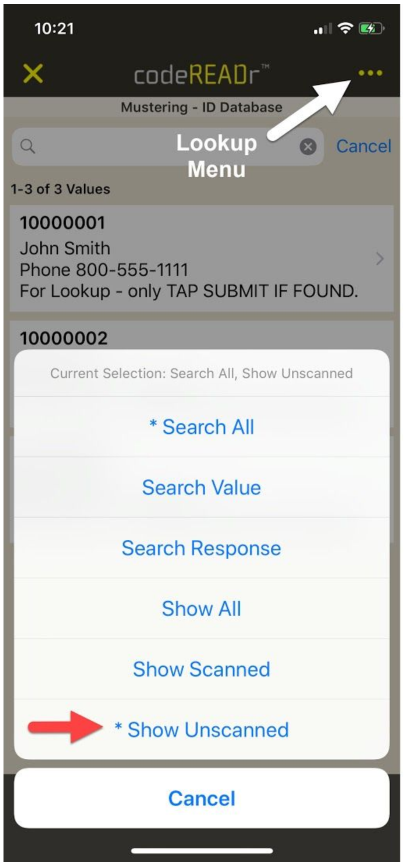
C. How App-Users use Lookup

Your app-users can not only scan IDs but also actively add ID holders as “found” using the app’s Lookup option even when not physically scanned at a designated mustering location. For record-keeping purposes, scan records can show how the data was entered - in this case, a Lookup, not a barcode scan.

If you include the ID holder’s phone number in the database (optional), the app-user can use the Lookup option to search for “Unscanned” IDs, select one to preview and then tap the phone number in the preview.

Most smartphones will auto-call that number. If the app-user acquires information indicating that the ID holder is safe, then when ending the phone call (and tapping the back button on Android devices), the preview screen will reappear for the app-user to select “Submit” to indicate the ID holder is found. See screenshots below.

Your app-users may also receive status information from other resources. If so, they can use the Lookup option by name to find the ID holder and then manually submit the result.



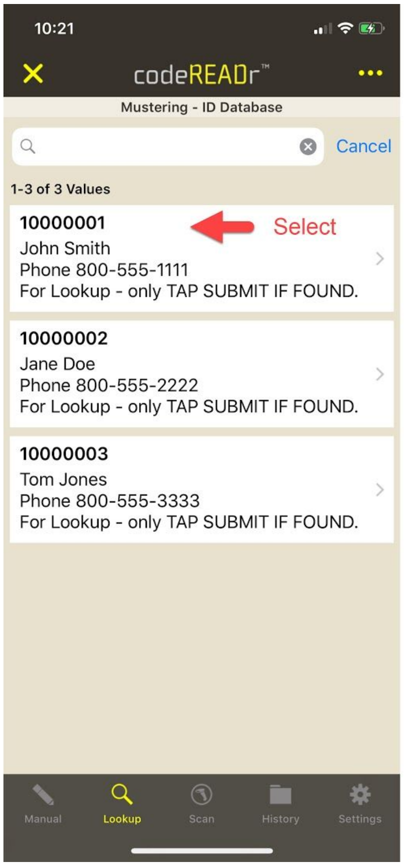
Lookup Menu

1-3 of 3 Values

10000001
John Smith
Phone 800-555-1111
For Lookup - only TAP SUBMIT IF FOUND.

10000002

Current Selection: Search All, Show Unscanned



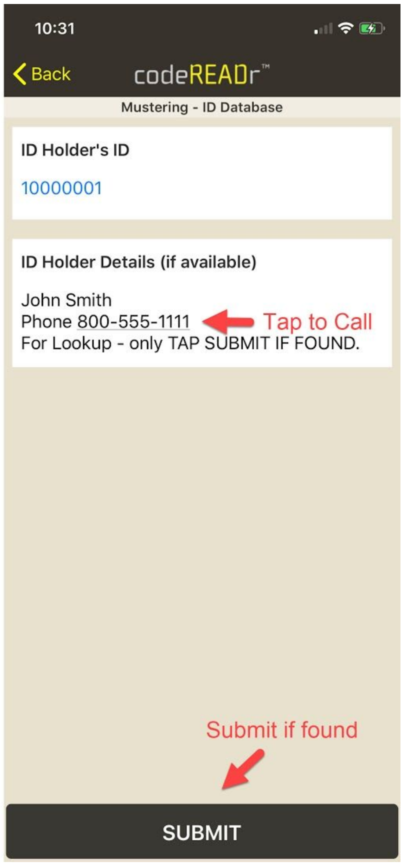
Select

1-3 of 3 Values

10000001
John Smith
Phone 800-555-1111
For Lookup - only TAP SUBMIT IF FOUND.

10000002
Jane Doe
Phone 800-555-2222
For Lookup - only TAP SUBMIT IF FOUND.

10000003
Tom Jones
Phone 800-555-3333
For Lookup - only TAP SUBMIT IF FOUND.



ID Holder's ID
10000001

ID Holder Details (if available)

John Smith
Phone 800-555-1111
For Lookup - only TAP SUBMIT IF FOUND.

Tap to Call

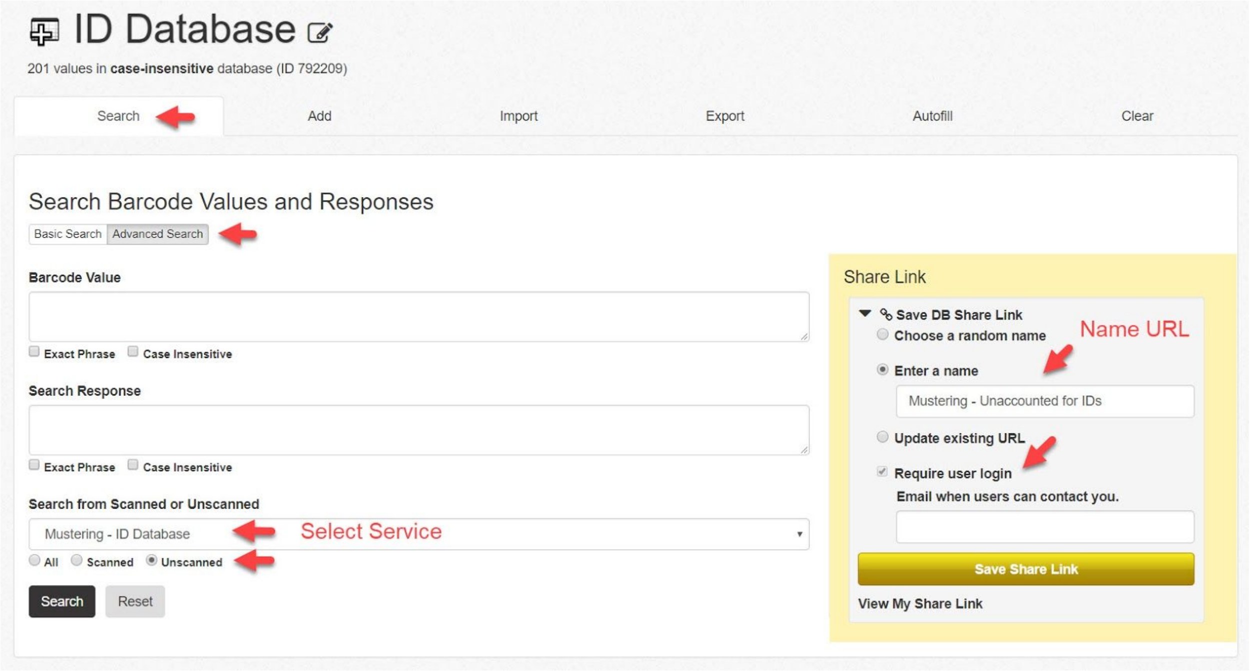
Submit if found

D. View Disposition List of Scanned and Unscanned Data

On the codeREADr website's Database page there is an **Advanced Search** option which has several powerful features:

1 - You, as the administrator, can search by Scanned IDs (accounted for) and Unscanned IDs (unaccounted for) and see the results directly on the Database page. The results (a "Disposition List") are updated in real time from all app-user devices, providing the device has Internet connectivity. Simply refresh the page to update that view.

2 - You can use this Disposition List to not only view but also take actions. You can even share that list with any member of your team by creating a password-protected **Share Link** for them to view the list on the web. All you need to do is issue them an app username and password for the specific mustering service you created.



ID Database

201 values in **case-insensitive** database (ID 792209)

Search Barcode Values and Responses

Basic Search | Advanced Search

Barcode Value

□ Exact Phrase □ Case Insensitive

Search Response

□ Exact Phrase □ Case Insensitive

Search from Scanned or Unscanned

Mustering - ID Database

○ All ○ Scanned ● Unscanned

Share Link

Save DB Share Link

○ Choose a random name

● Enter a name

Mustering - Unaccounted for IDs

○ Update existing URL

☑ Require user login

Email when users can contact you.

When filtering, you must **select the service** to check against. When filtered, you can scroll down the web page to see the results.

A Share Link is only helpful if you want to share the Disposition List. They will be able to view and use the data, but not directly edit it or download it. A good practice would be to name her Share Link after the specific task or the service selected.

E. Editing Disposition List

During the mustering event, from the originally uploaded database you may want to remove remove absent ID holders or those whose safety was otherwise determined.

You and your team members with Share Links can use the codeREADr mobile app to change an ID from unscanned to scanned without actually scanning. To do that, use the mobile app's Lookup option to select the ID/Name and then submit the record. See "How App-Users use Lookup: above.

There are two other options - you should **choose only one**:

1- Edit the online database directly.

You cannot mark the ID as "scanned" on the Databases page but you change an IDs status from Valid to Invalid, or Delete it completely. You can also comment in the Response text field, for example to note this ID holder was otherwise accounted for.

(or)

2 - Edit your database offline and re-import.

You can also upload an updated database at any time after a mustering event has begun. That new database will not change the scanned and unscanned status of the remaining IDs in the database.

There are important considerations, though.

a) New IDs will be added in an upload without issue - they will simply be shown as unscanned.
b) However, if IDs need to be removed from a previously uploaded database, you should not manually make changes directly on the Databases page. Instead, you should do that within the offline database to avoid overwriting what you've done manually on the Databases page. In your offline database you would mark removed IDs as Invalid by putting a "0" in column 3 and optionally adding Response text in column 2.
c) You should generally not use the Databases "Clear" option while an active mustering event is ongoing.

Whether editing online or offline to mark an ID as Invalid, if scanned the response presented to the app user will be "Invalid or ID Already Found". That differs from the "Invalid Duplicate" message the app-user gets when the ID has already been scanned.

Also, if the app-user is using the Lookup option, those IDs marked as Invalid will be shown as "Invalid or ID Already Found" and therefore they won't waste time calling them. The Share Link will indicate those IDs as Invalid along with any response text your added.

F. Filter, View and Export Scan Records

1 - On the Scans page you can filter, view, and export your scan records as as CSV file based on an export template. With the template you can specify which data to export, name the columns and arrange the column order.

These are the available data points:

Who scanned (app username)
What they scanned (the barcode ID scanned)
When they scanned the barcode (time and date stamps)
Where they scanned (GPS optional)
How they scanned (scan, lookup, manual entry, NFC)
Why they scanned (the workflow name and service ID)
Associated data (answers to prompts you may have presented to the app-user)

G. Advanced Integration with Your Servers, Third-Party Servers

1 - If you prefer to have scan records sent to your server or to a third party server, your developer can enable that using our Postback URL option (our server is a conduit) or Direct Scan to URL option (direct scan from app to your designated server).

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