

ECONNECT POS CONNECT USER GUIDE EC9



APRIL 2023



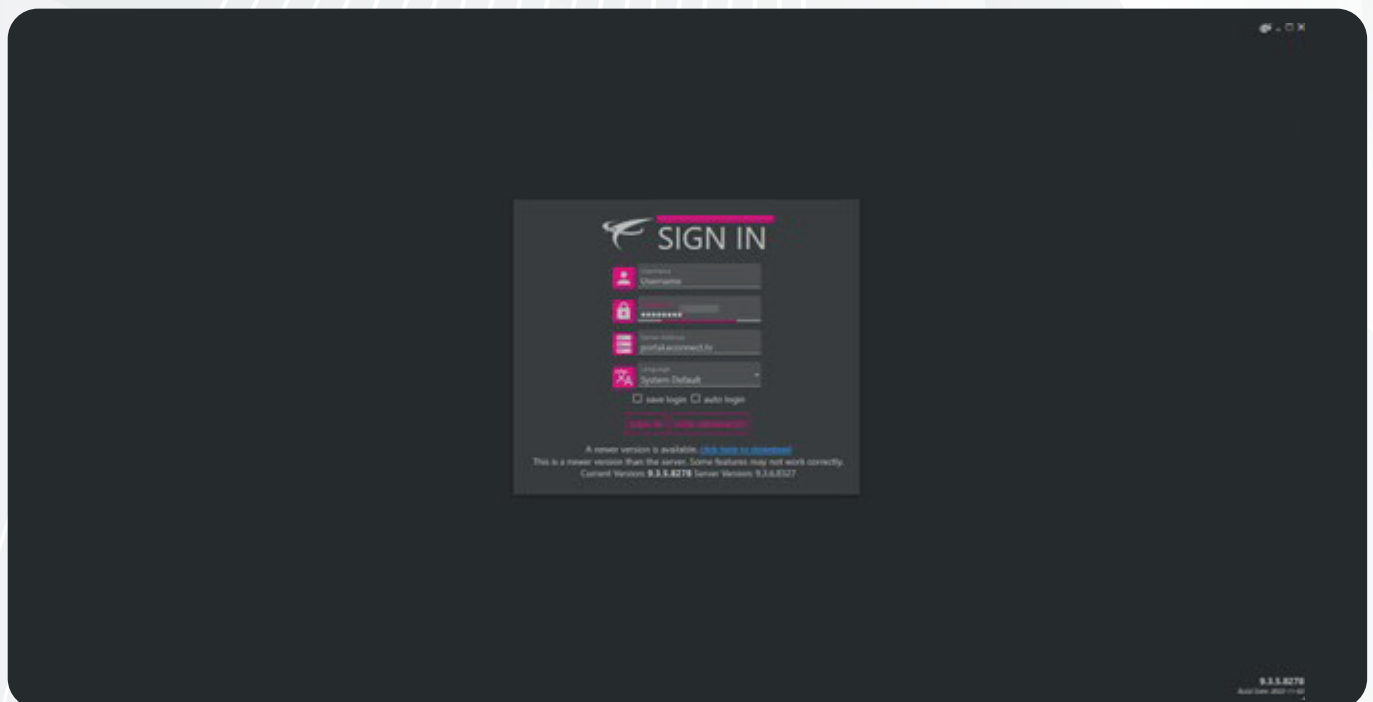
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LOGGING IN

After the product has been installed on your PC, go to your desktop and double-click on this icon:

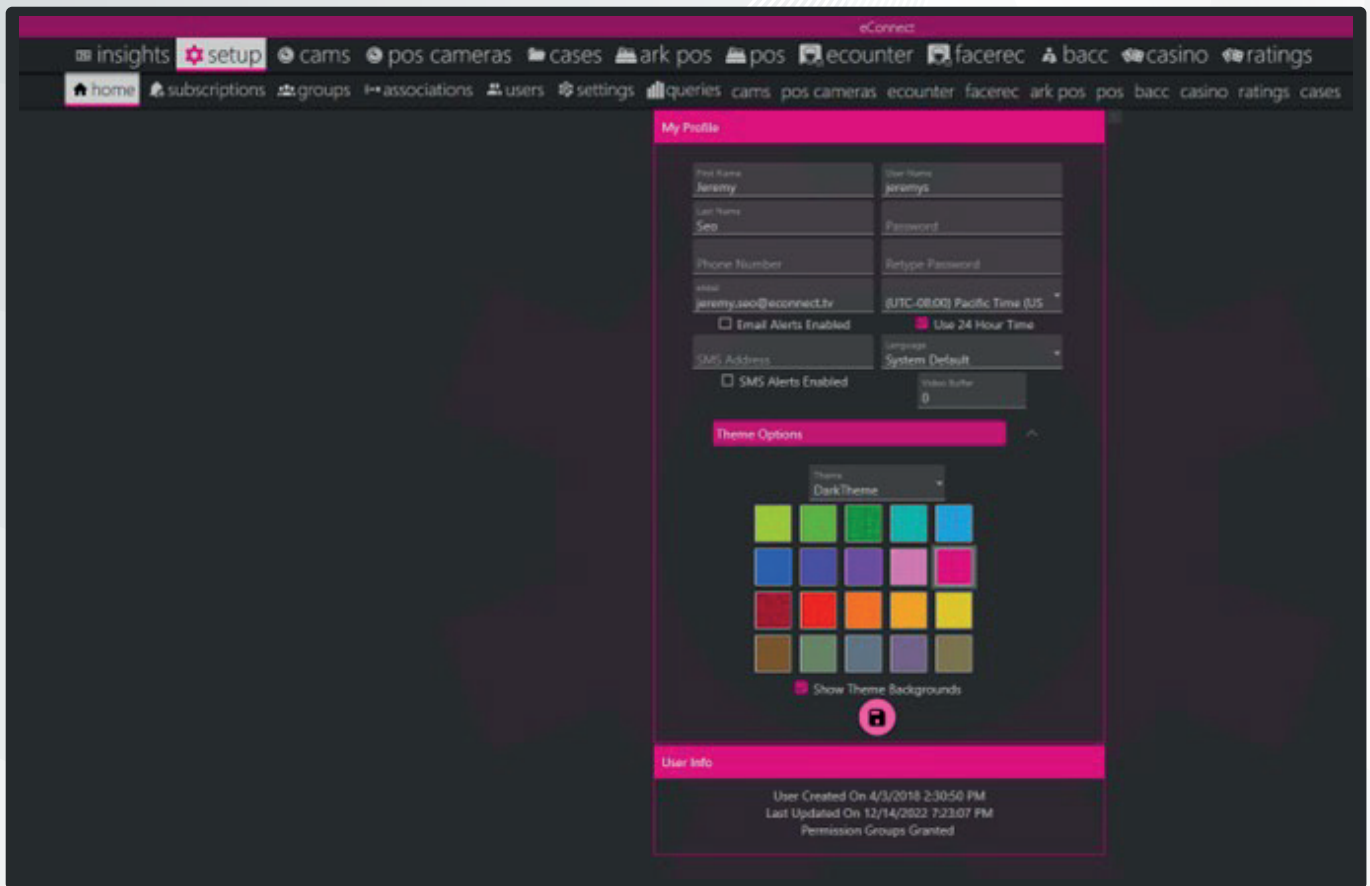


Once the program loads, you'll see the screen below. Type in your username and password and click "Sign In" to enter the program.



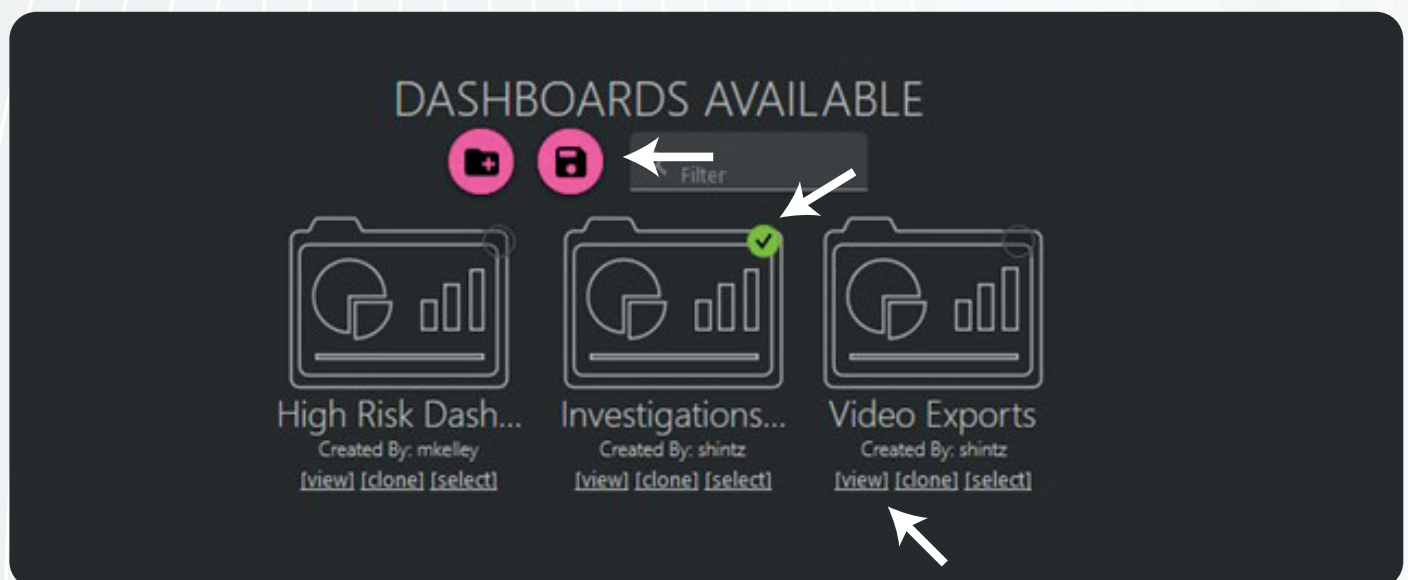
You can choose to use the dark or light theme when using eConnect. This is done by clicking on the "setup" tab and selecting the "Theme Options" drop-down menu. You can also select your accent color by clicking on a color on the color palette.

Save by clicking on the  icon.



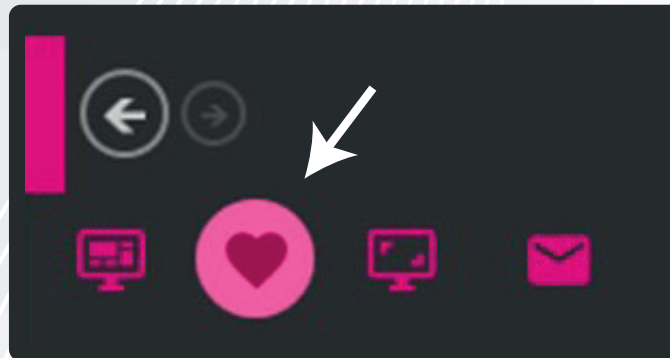
Dashboard



Upon successful login, you'll see the dashboard screen. This screen will allow you to customize your dashboard in the way that works best for you. The first time you log in using a new username you will be directed to this screen. To select the dashboards, you would like to have on your screen click on the circle at the top right corner of the folder and you will see a green check appear, you can also click on select and this will show the green check box. Once you have selected all your dashboards click on save subscriptions.




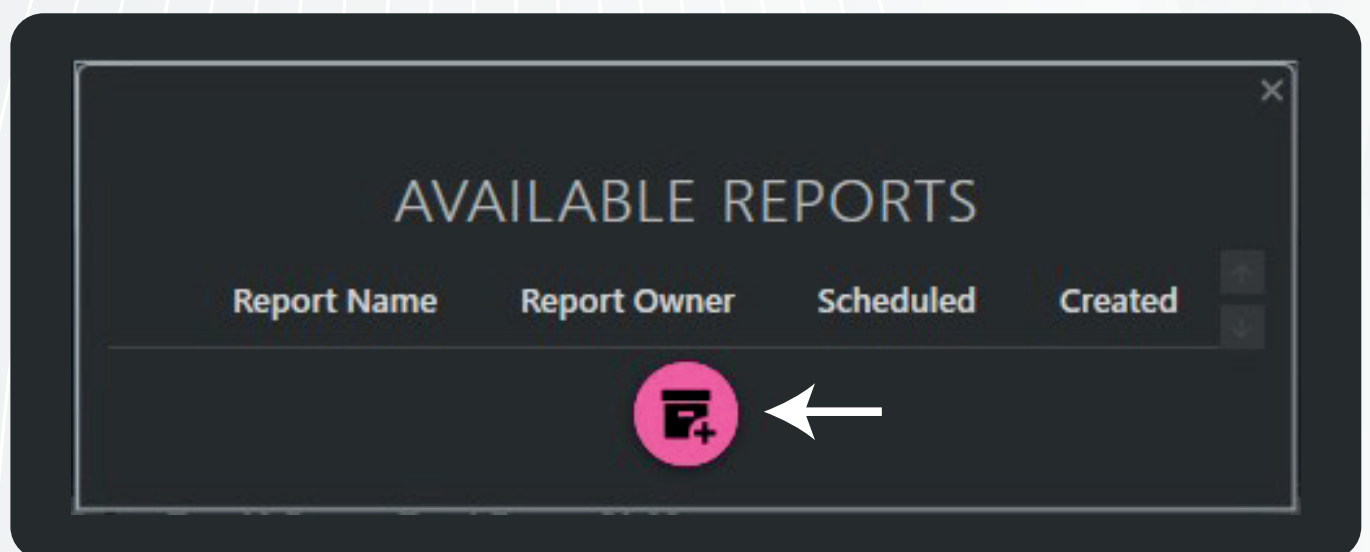
You can also click “View” beneath each folder icon to see the dashboard before you select it.


- Once you have your dashboard(s) created, you can use the “Favorite” icon. This will automatically load the dashboard you have selected each time you log in to eConnect.

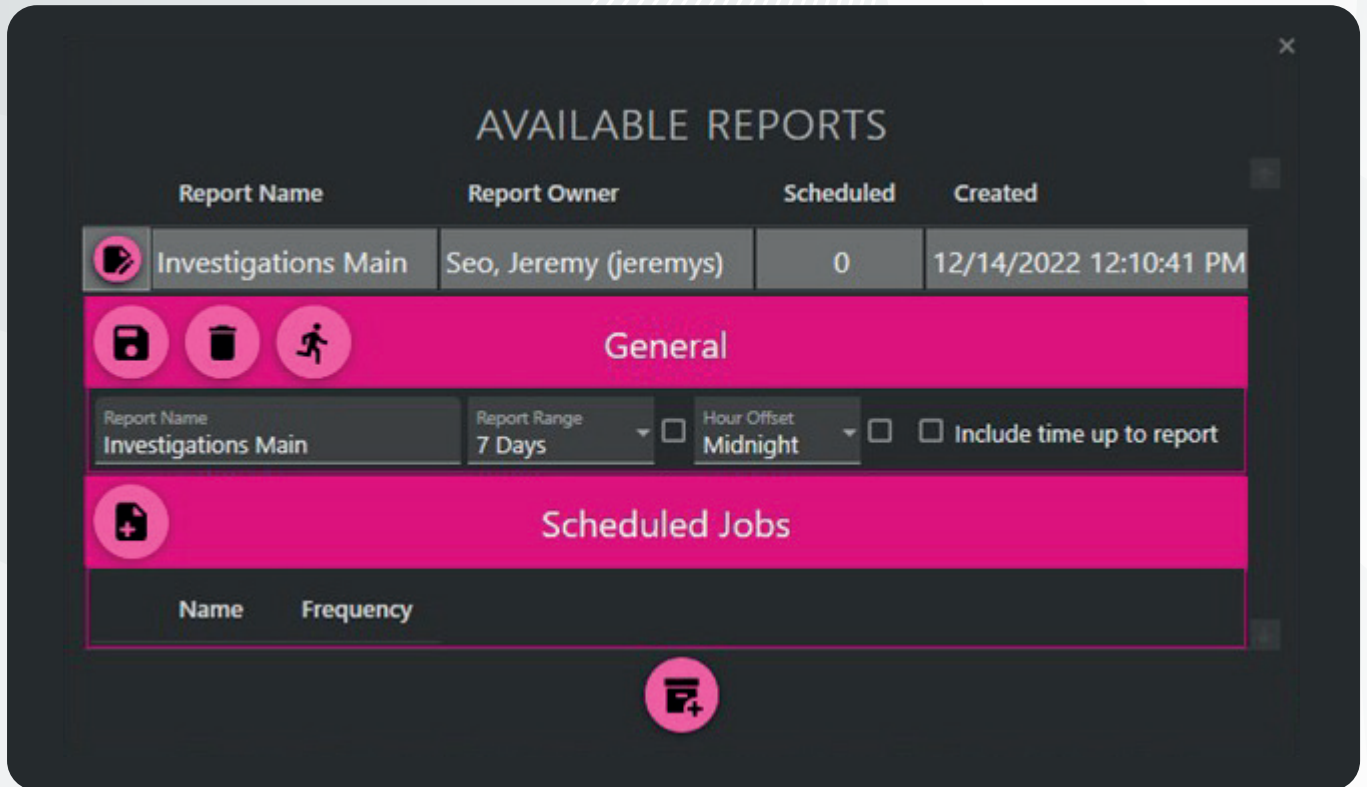




To return to the available dashboards you can click on the  icon and this will direct you back to the available dashboards. If you would like to take a screenshot of the dashboard view you can click on the  icon and it will take a picture of your dashboard data.

You can also choose to subscribe to a dashboard. When setting up your user account you can add your email address. Subscribe to a dashboard means you will receive an email with the graphs and data that are on the dashboard. By clicking on the envelope  a window will open to configure your subscription.



Click on the add new report icon (see above). You will see the name of the dashboard added along with the schedule saying 0. Click on the  icon of your dashboard to expand and set up.



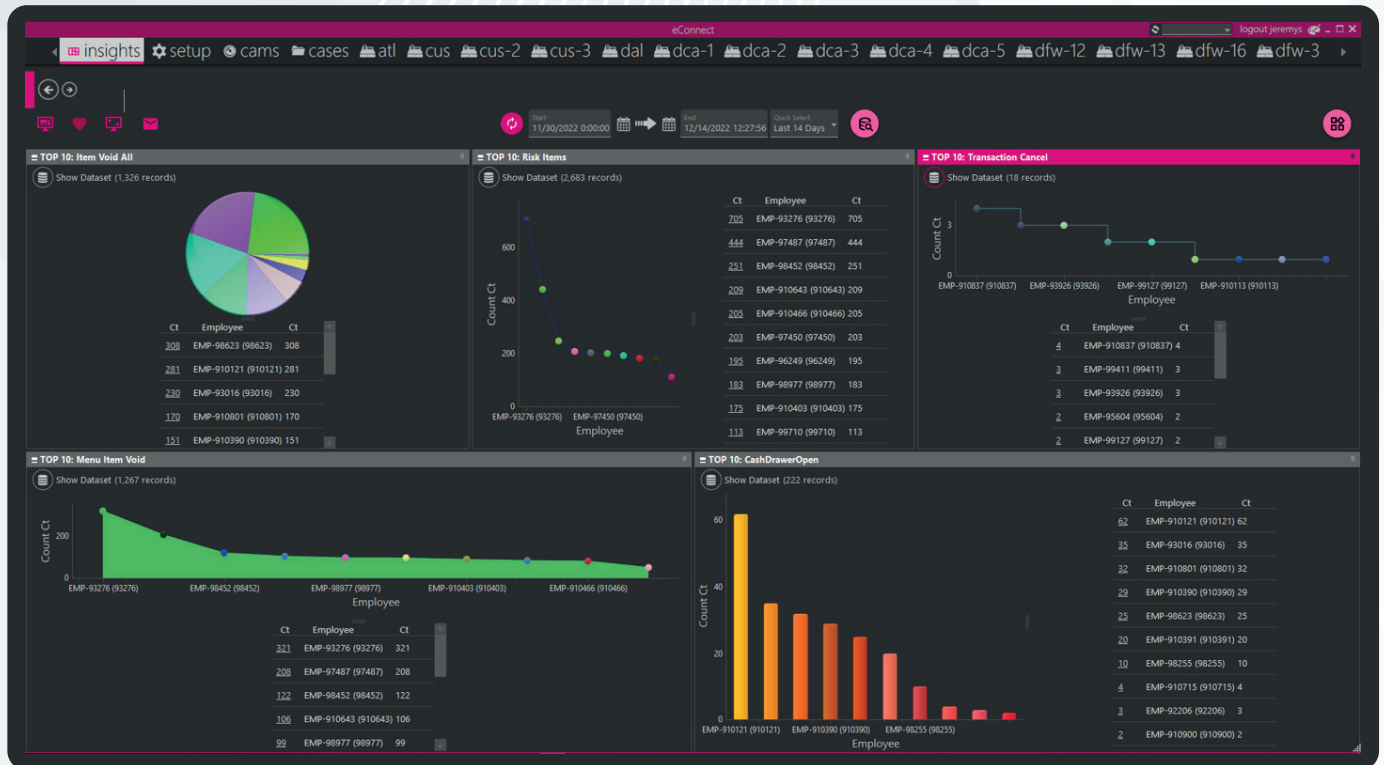
Above is the view you will see. In this case, the name of the dashboard is “Investigations Main” and it is recommended that you rename your report. You can choose the range of your report from 1 day to 1 year and set your offset. This is so you can choose your start of the day. To set up when the email is sent to you click on the  icon in the Scheduled jobs area. From here you can set when you want the report sent and at what time of the day. Be sure to click on the save button  when finished.


Custom Dashboard:

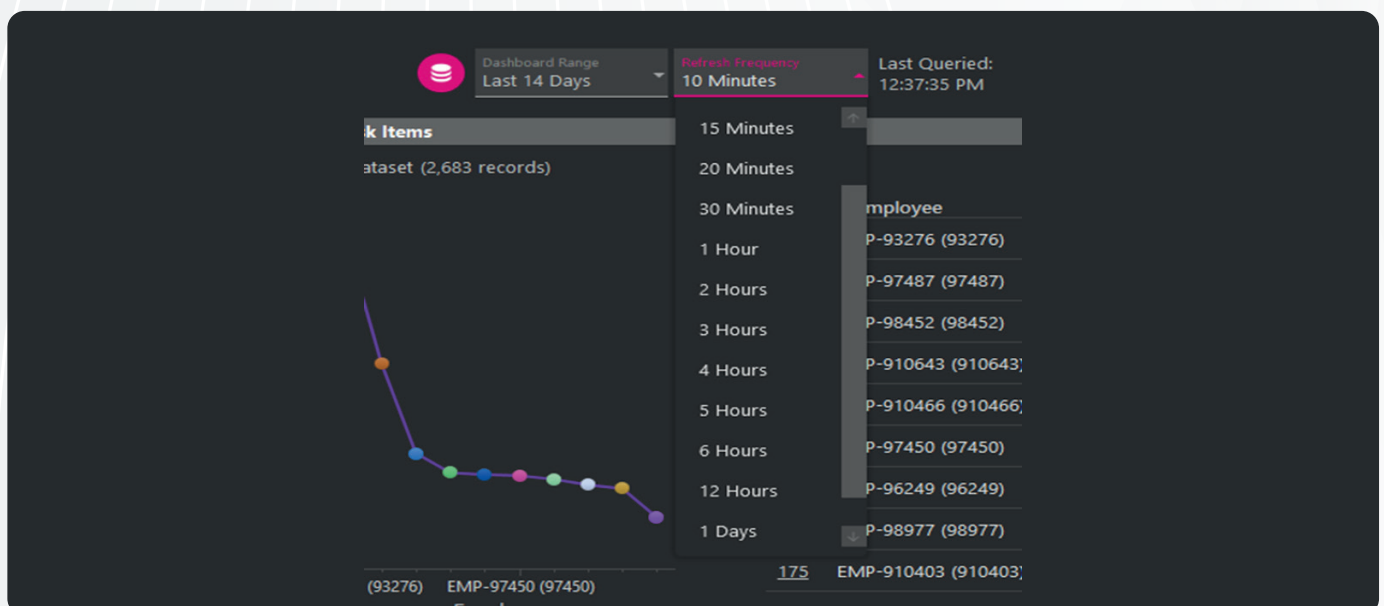
- You can create as many dashboards as you like.
- If another user creates a dashboard and it is not set to private, you can subscribe to see and/or use the dashboard on your home screen.
- New dashboards will allow you to not only have queries displayed but also aggregate and display the results.
 - Pending reviews can also be displayed.

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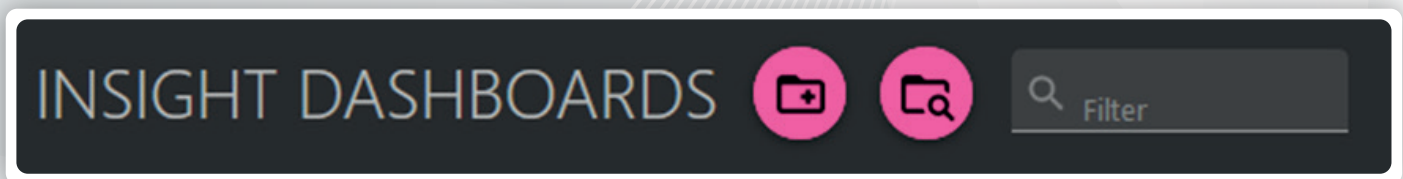


- By clicking on this icon , you can toggle your dashboard to automatically refresh.



- You can set up your dashboard to refresh every minute or at longer intervals.


Creating your Custom Dashboard:

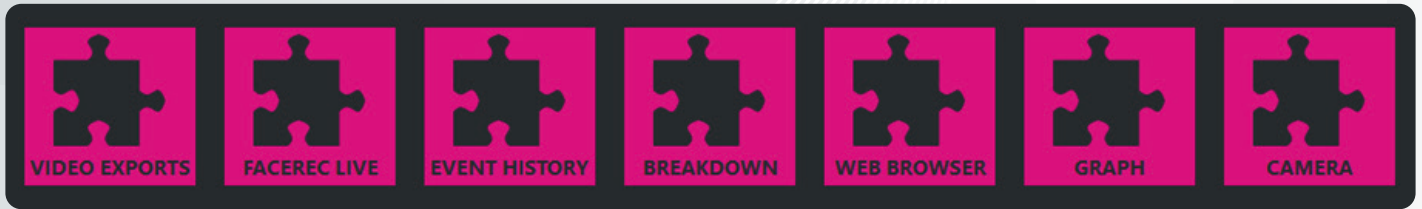


- To begin click on New Dashboard icon see the arrow above.
- You will be asked to name your dashboard and enter a description. Below you will see two checkboxes. Checking "Private" will set the dashboard to private so only the creator and any admins can see it. If unchecked, other users can subscribe to and see your dashboard. Checking "Others Can Edit" will allow other users to edit your dashboard.

- Once filled out click on the save Icon
- You will be brought back to the dashboard page where you will see the dashboard you just created.

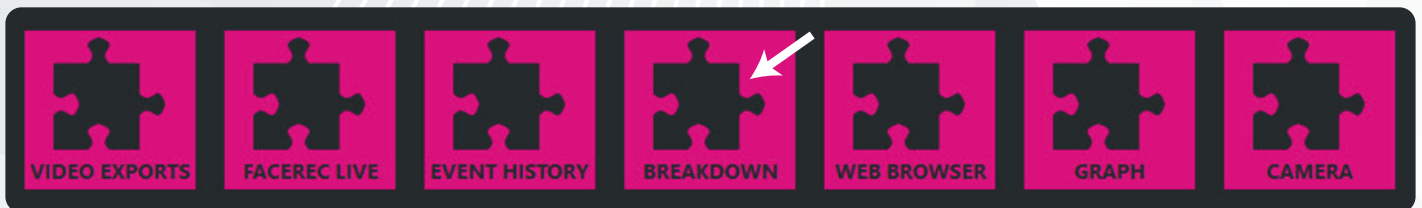


- Clicking on the folder will take you to a blank dashboard.
- To start, click on the add widgets icon  on the right side of the screen.
- You will then be given several options:
 - **Video Exports** – This will allow you to see the status of video clips. It shows clips that are in the process of being exported, clips that have failed, and clips that are complete.
 - **Facerec Live** – This will allow you to see live faces detected on all or select cameras set up in FR and limit to tags as well.
 - **Event History** - This allows you to quickly access checks that have been previously red-flagged.
 - **Breakdown** - This widget allows you to graph and aggregate queries from your system data. It simplifies the steps used in the “Graph” widget and gives you additional customization options.
 - **Web Browser** – This allows you to put a web browser window on your dashboard.
 - **Graph** – This lets you graph and aggregate queries from your system. This option should be used by more advanced users.
 - **Camera** - This allows you to add cameras to your dashboard for viewing.

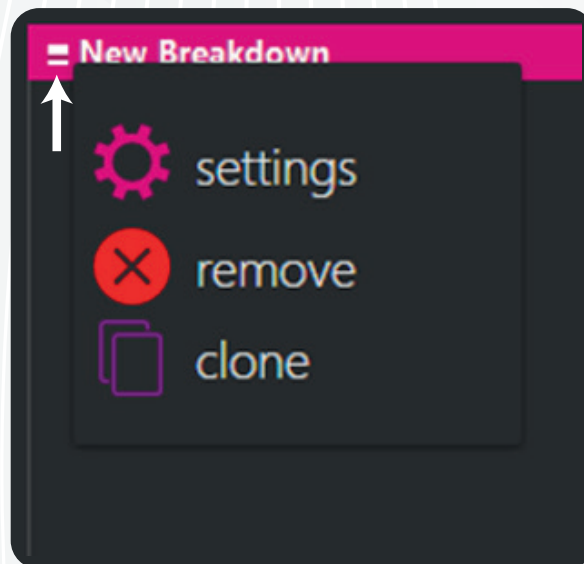


Adding a Custom Graph to the Dashboard Using the Breakdown Widget

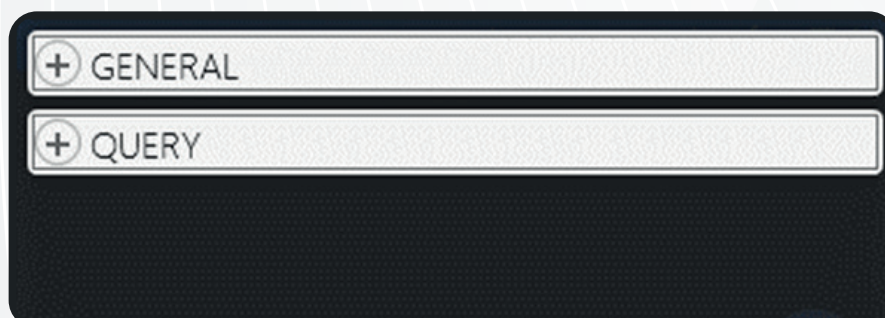
- Start by clicking the add widget  icon on the right side of the screen.
- Click on the “Breakdown” widget.



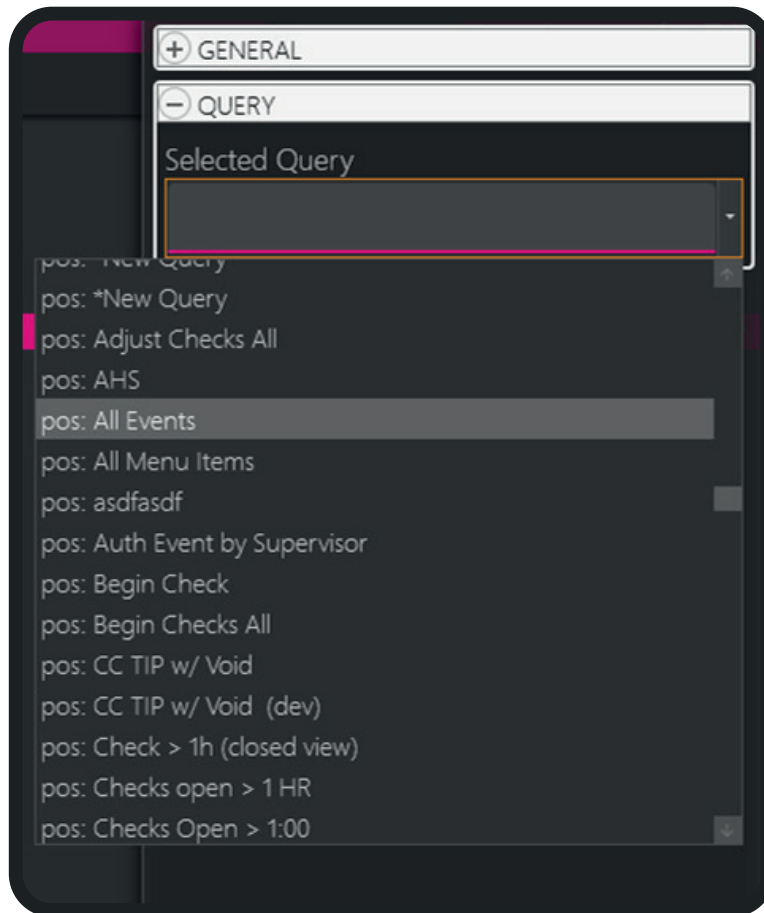
- This will take you to the dashboard. An area will be blank, and you will see “New Breakdown” at the top of the area. Click on the two lines next to the words “New Breakdown” to open the menu. Then click on “settings” to begin building a query.



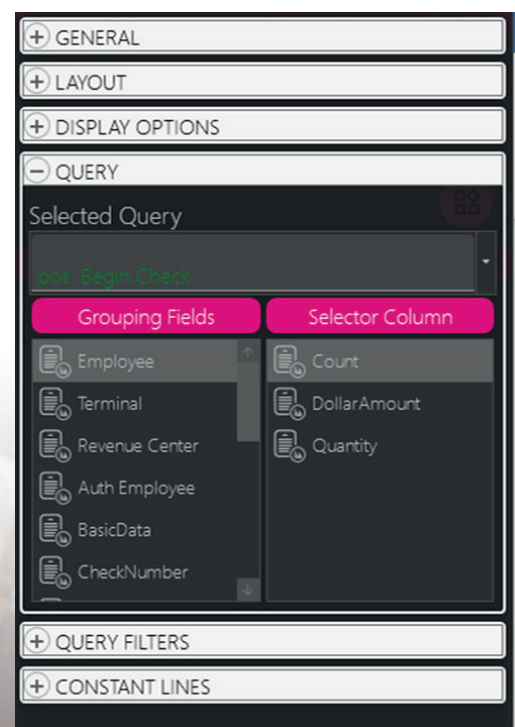
- On the right side of the screen, you will see this window appear:



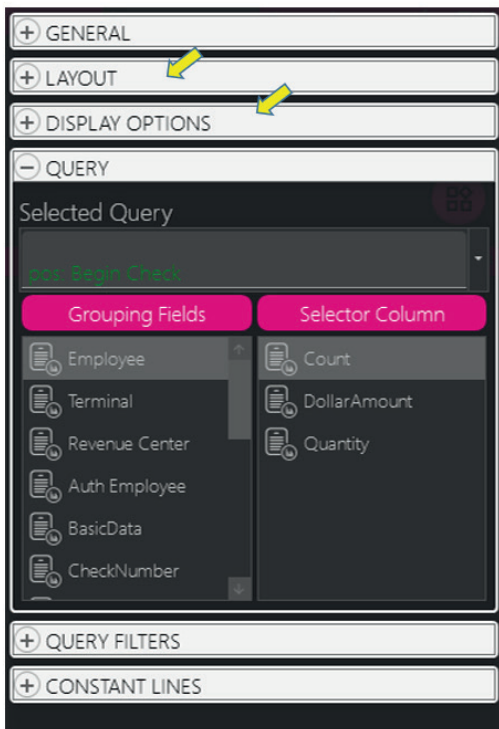
- Start by clicking on the “+” symbol next to the word “Query” and you will see this:



- Use the dropdown menu under where it reads “Selected Query”. This dropdown menu includes all the queries you have set up in the eConnect System. You may also type in the name of the query you want to select.
- Once you have selected a query, additional sections labeled “Grouping Fields” and “Selector Column” will open. Select who or what you want to view related to the selected query.



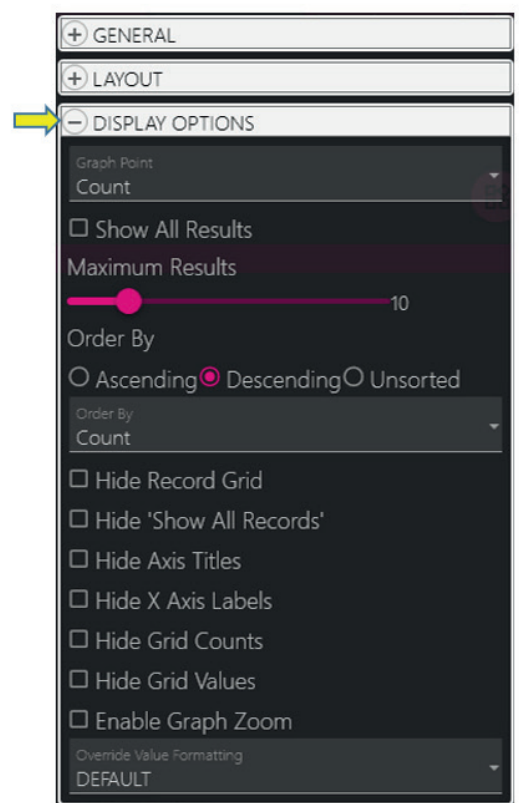
- After selecting a “Grouping Field” you can select a way to break down the group by selecting a filter in the “Selector Column”. In this example, “employee” was selected in the Grouping Field, and “Count” was selected in the Selector Column.



Note: when you start creating your breakdown graph you will only see the two options when you begin (General and Query). Once you have selected a query additional options will appear in the window

- You can move on to the Display Options Section by clicking the “+” symbol next to the words “Display Options”.

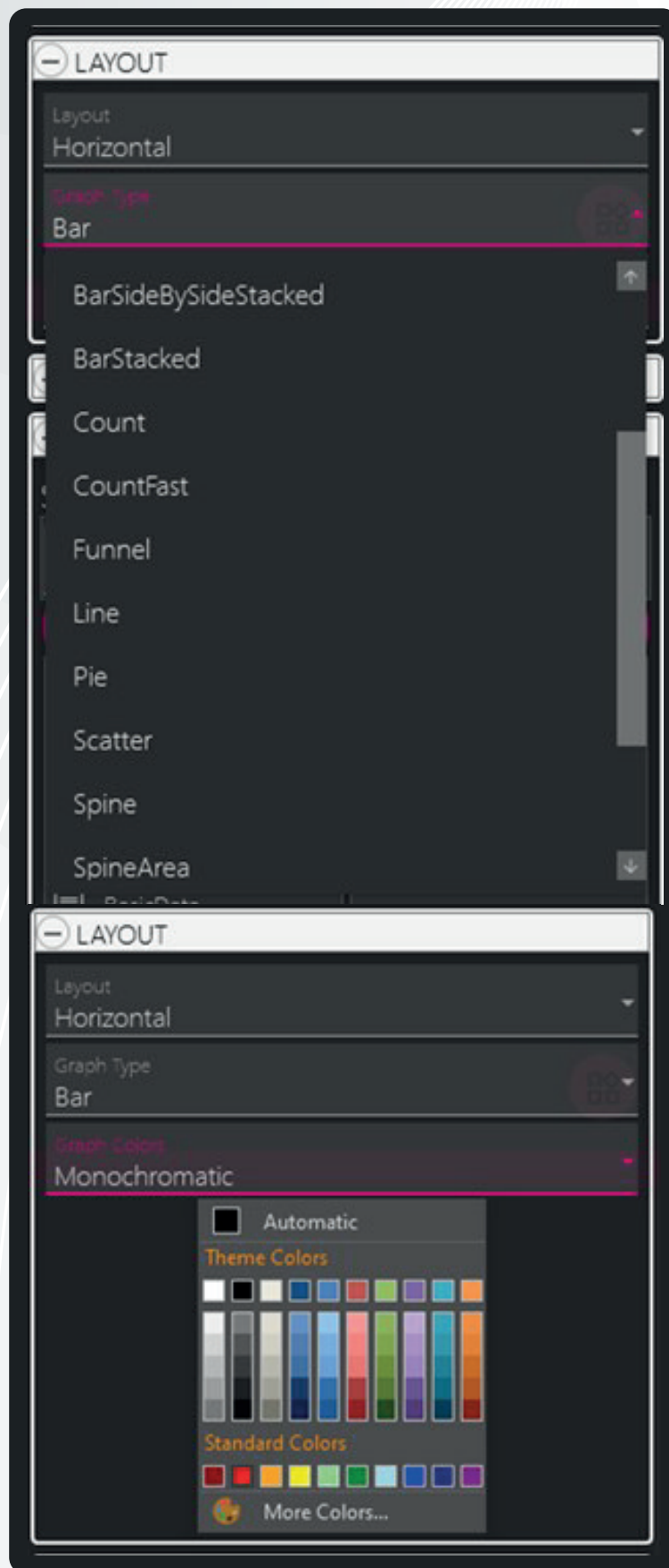
- This section allows you to select other adjustments such as the number of employees to be graphed or the order they will be represented.
- From here you can select what you want the graph points to be (i.e. Sum, Count, etc.) Along with the maximum results to view in your graph. You will also be able to select ascending or descending results. You also can hide parts of the graph you don’t want to see by selecting the box to the left of what you want to hide.



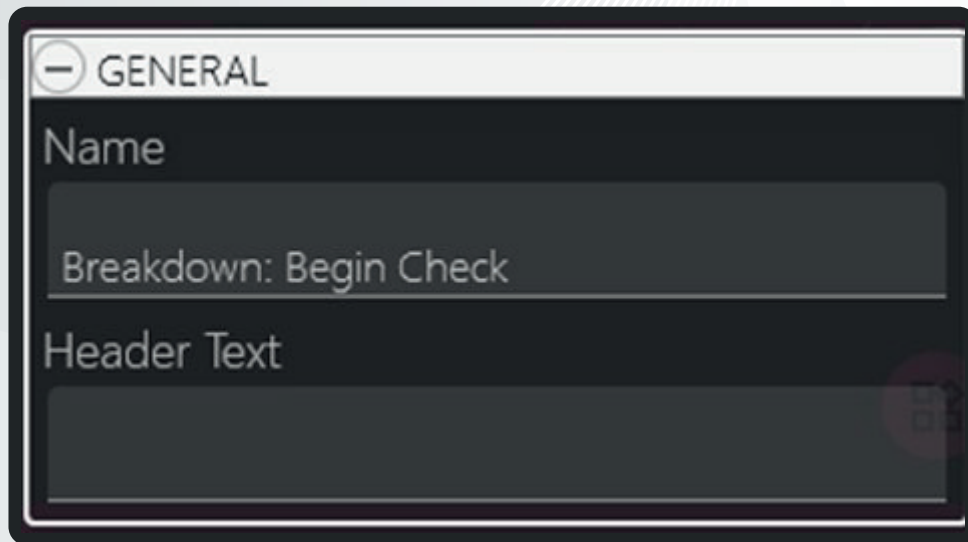
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- Once you have set your display options, click on the "+" symbol next to the word "Layout" to select your layout options.

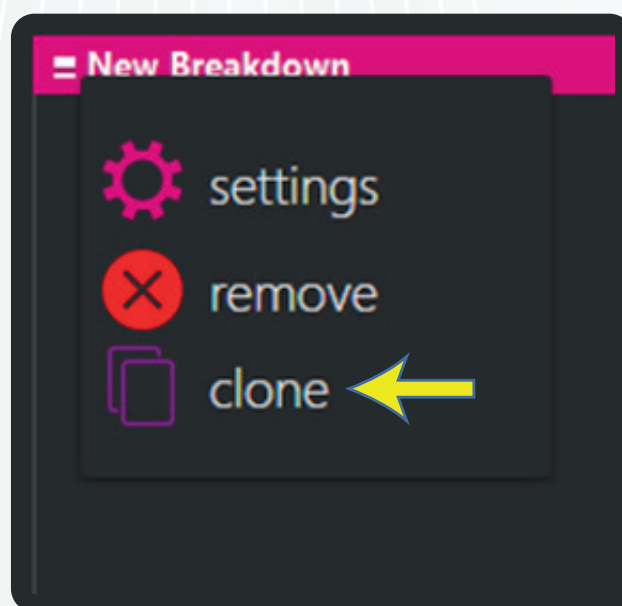
- The Layout section allows you to select the orientation of the graph as well as which type of graph you would like to use to report the query you selected. You can also select the Graph Colors from the original, greyscale (and select the color you want to use), or random.



- Once you have completed your layout selections, click on the “+” symbol next to General. Here you will be able to name your graph. You can also add a header to your graph by entering the information in the box labeled “Header Text”.

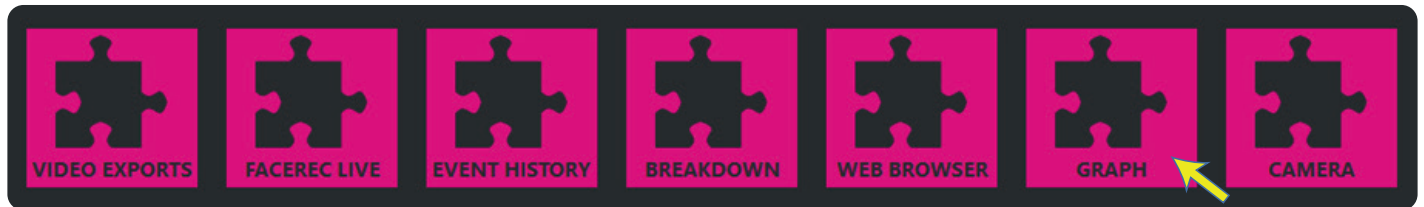


- When you are happy with all the custom options you have selected, click on the “Save” button at the bottom of the window and the graph will be added to the dashboard.
- If you want to change any part of the graph, you can do so by clicking on the setting option again and altering any section you choose.
- You can also select the “Clone” option to recreate the custom graph and then use “Settings” to alter the look of the new graph.



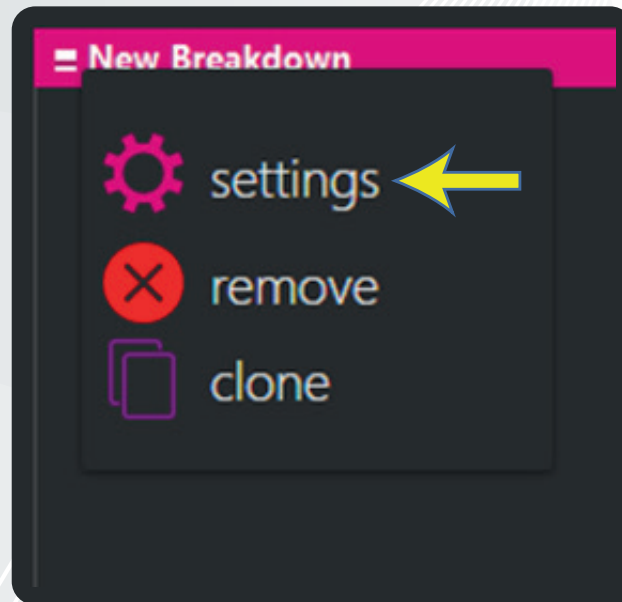
Adding Custom Graphs to Dashboard Using the Graph Widget

- There is a second way to add a graph to your dashboard. This is a secondary option for more advanced users and “Breakdown” is generally recommended. To use this secondary option, click on the “Graph” widget.



- This will take you to the dashboard. An area will be blank, and you will see “New Graph” at the top. Click on the two lines next to “New Graph” to set up the query. Then click on “Settings”.

A screenshot of a mobile application interface for configuring a new graph. The screen has a dark theme. At the top, there's a 'Name' field with 'New Graph' entered. Below it is a 'Graph Type' section with a green circle icon. The main area is titled 'Data Sources' and contains a search bar with a magnifying glass icon and a 'Filter' button. Below the search bar, there are three sections of data sources, each with a header and a list of checkboxes: 1. 'GamingFloorShiftReportView' with a checkbox for 'Shifts - All'. 2. 'GamingFloorShuffleReportView' with checkboxes for 'Shuffle - All', 'Shuffle - Complete', and 'Shuffle - Incomplete'. 3. 'SlotView' with checkboxes for 'SLOT - CANNOT READ CARD', 'Slot - Door Closed', and 'Slots - All Events'. Below these is a 'TitoView' section with checkboxes for 'TITO - Active', 'TITO - All', 'TITO - Expired', 'TITO - Redeemed', 'TITO - Unredeemed', 'TITO - Voided', and 'TW Test Query'. At the bottom left is a 'SAVE' button. At the bottom right are three radio buttons: 'Use Dashboard Range' (selected), 'Last 7 Days', and 'Last 14 Days'.



- On the right side of the screen, you will see this window appear:

Name logout jeremy

New Graph

Graph Type

☒ Data Sources

☐ SlotView

☐ TitoView

☐ Shifts - All

☐ Shuffle - All

☐ Shuffle - Complete

☐ Shuffle - Incomplete

☐ SLOT - CANNOT READ CARD

☐ Slot - Door Closed

☐ Slots - All Events

☐ TITO - Active

☐ TITO - All

☐ TITO - Expired

☐ TITO - Redeemed

☐ TITO - Unredeemed

☐ TITO - Voided

☐ TW Test Query

☒ Use Dashboard Range

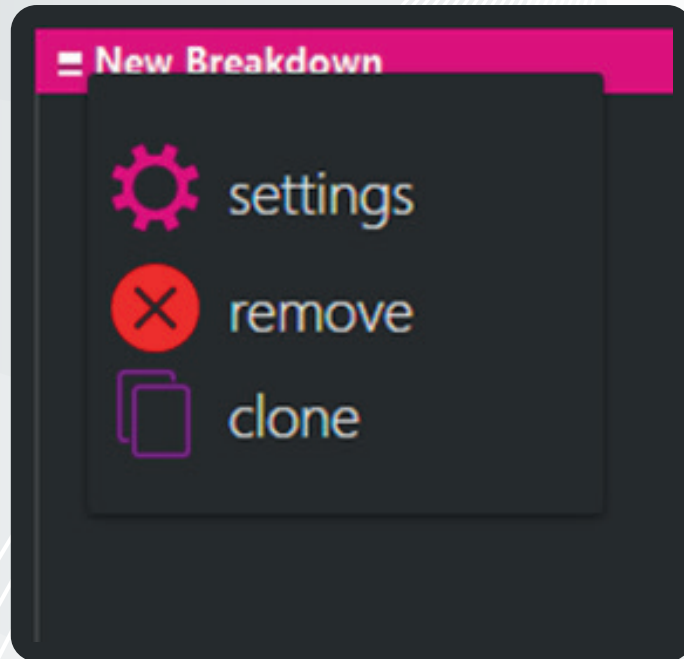
☐ Last 7 Days

☐ Last 14 Days

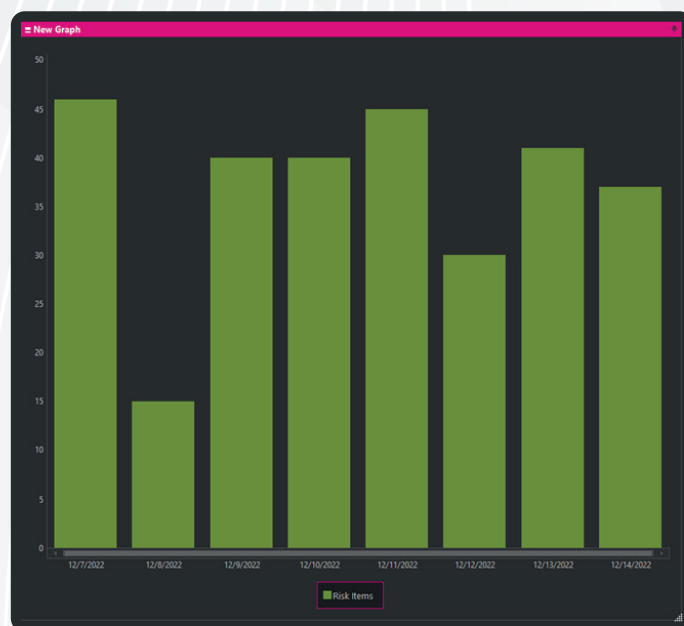
SAVE



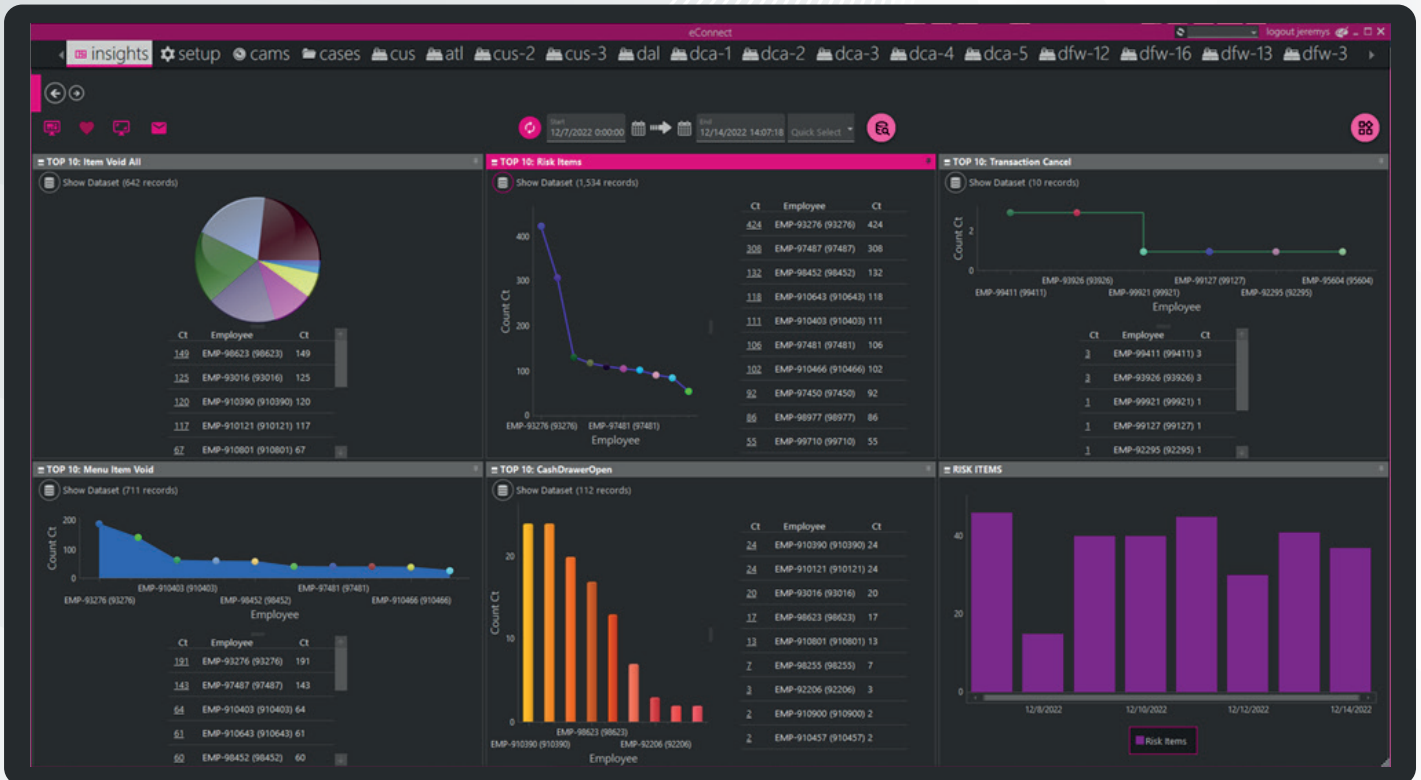
- At the top, you will need to name your graph.
- Select one or more queries to be displayed on your dashboard.
- At the bottom, "Use Dashboard Range" is selected by default. This will allow the graph's data to change based on the date range on the main dashboard.
- When you click "Save" you will see the graph populate behind this window. At this point, you can still make changes before closing.
- **Note:** If you want to edit this graph after it has been saved, click on "settings".



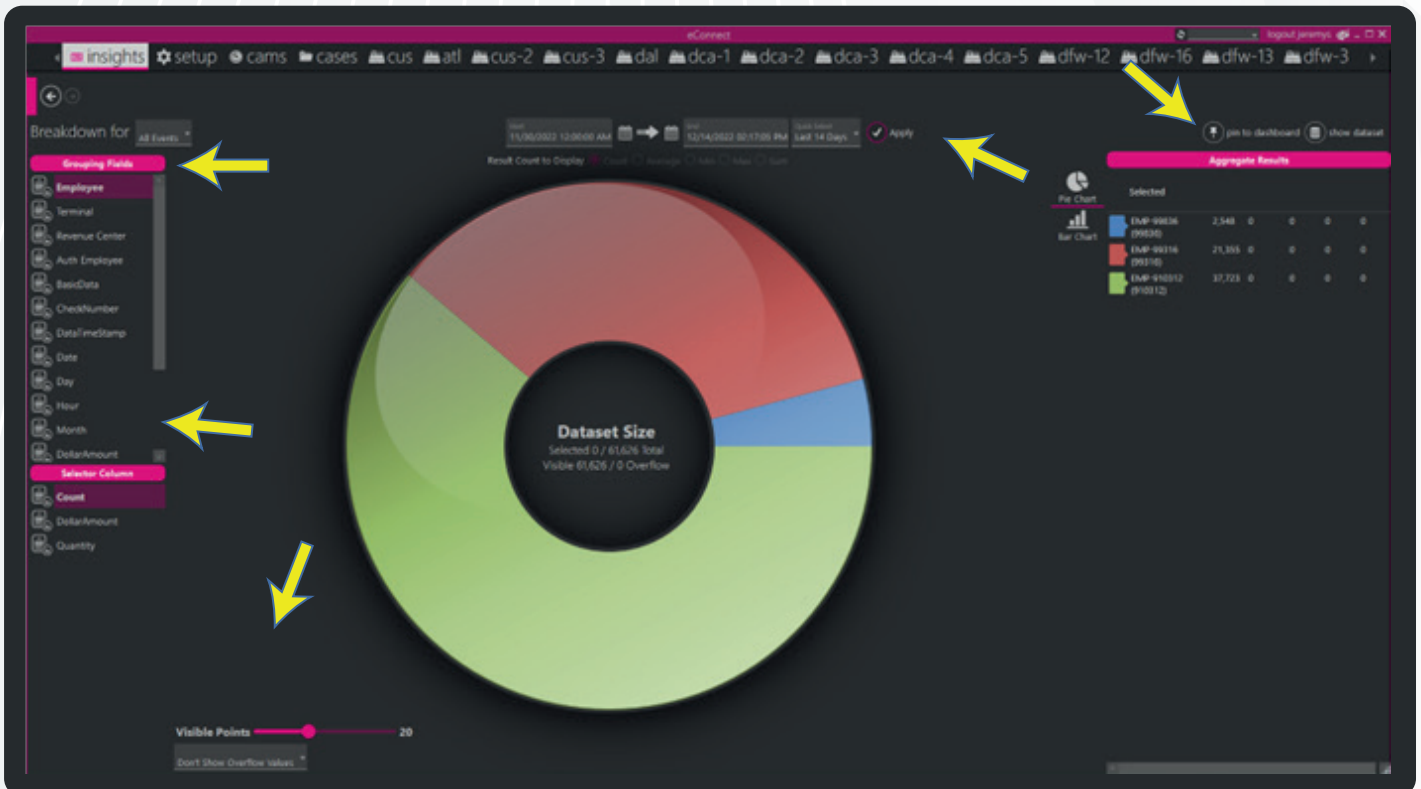
- You will then see the graph you have created.



- You can repeat these steps to add additional queries. This is an example of how your dashboard might look with multiple graphs:



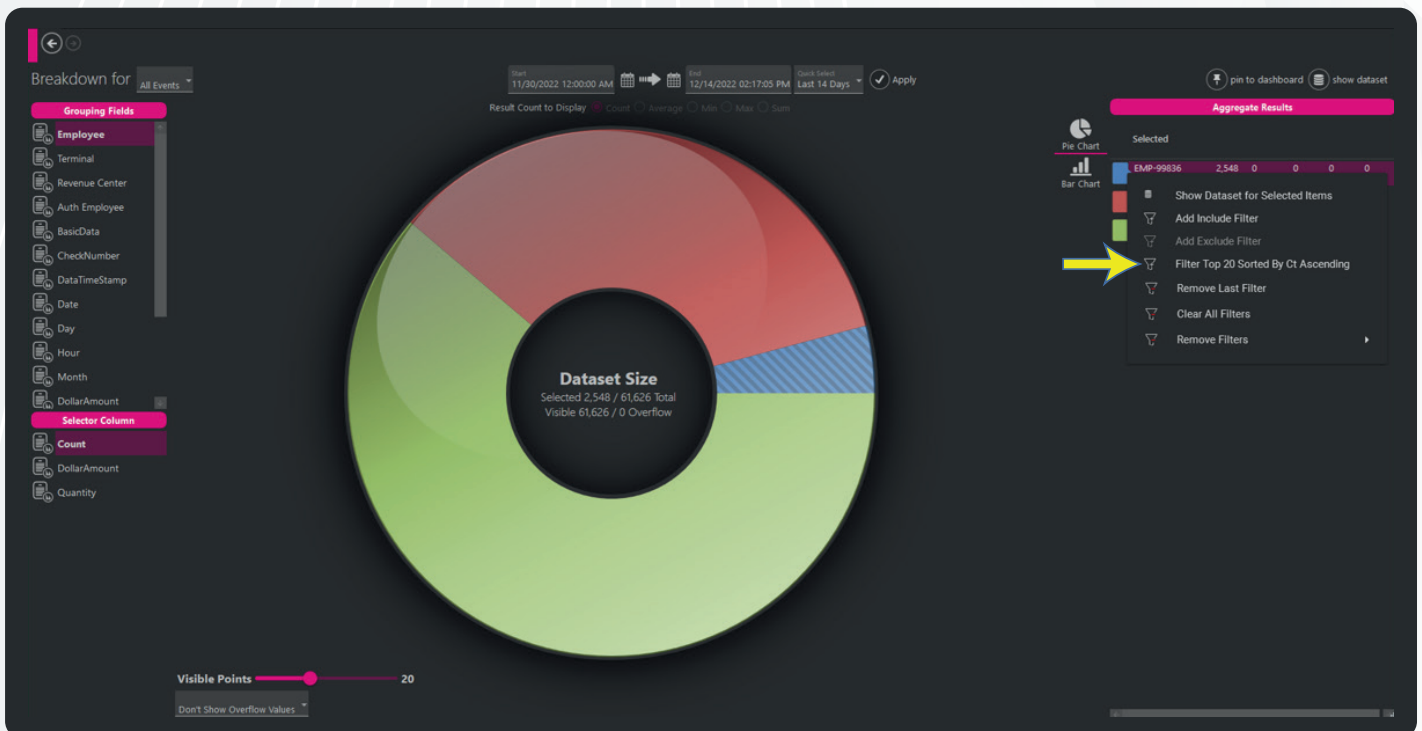
- Once created, graphs can be modified to break data down into greater detail. Select the graph by clicking on it and you will be taken to a new screen.



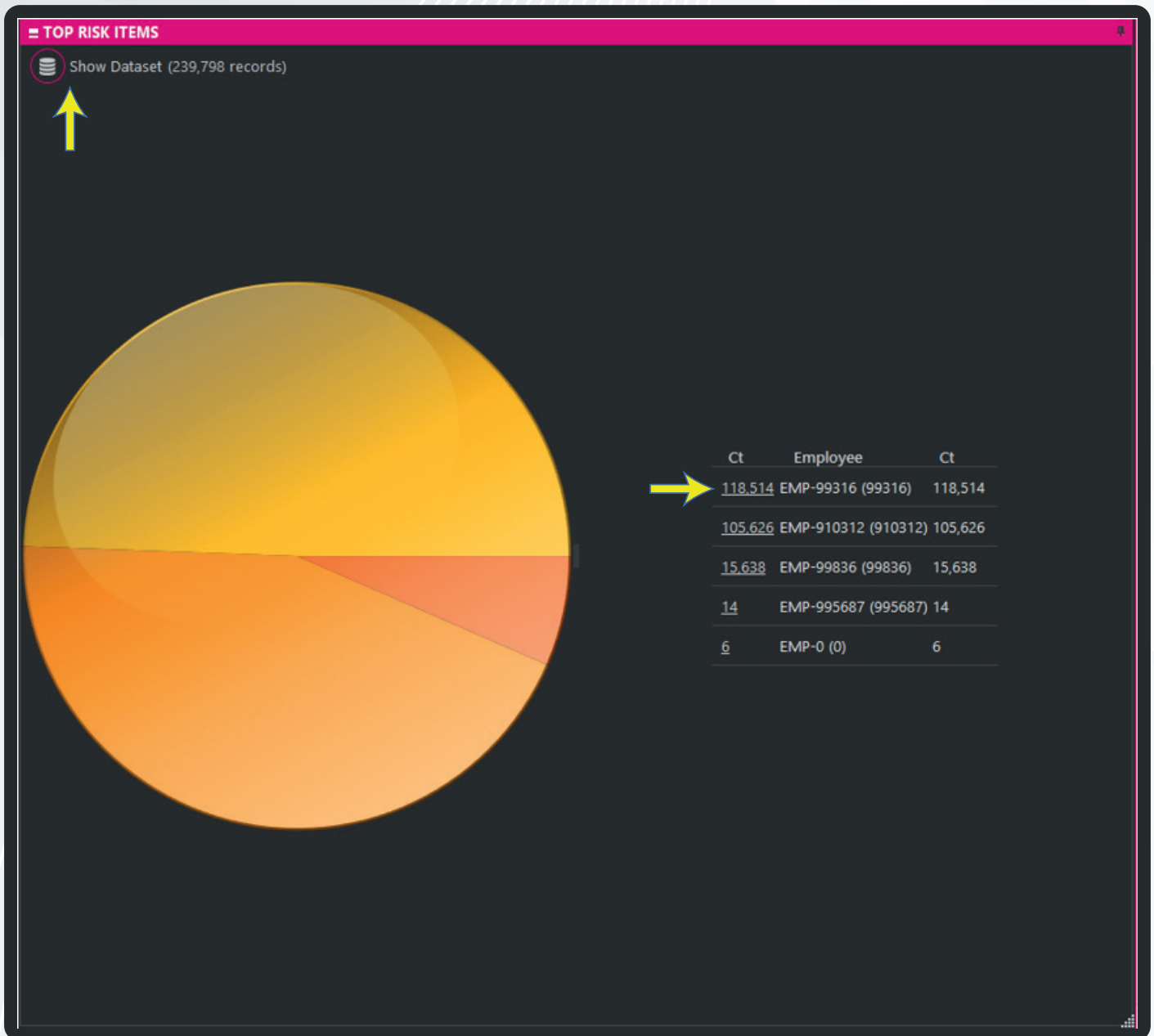
- Select how you want to group the data. In this example, “employee” and “count” are selected. This shows which employee has the most events:

Important areas needed in this view are as follows:

- Grouping Fields
- Selector Column
- Pie Chart or Bar Chart
- Date Range
- Show Dataset
- You now get to decide how many results you want to have displayed. Use the slider bar at the bottom of the screen to choose the number of results you would like displayed. For example, slide to the bar to “5” to have the top five results displayed. Once you have selected how many results you want to see, click on the field you are interested in and select to sort as either “Descending” or “Ascending”.
- Next, right-mouse click in the Aggregate Results section on the right of the screen to add a filter. This filter will then be applied to the results. You can apply as many filters as you would like before pinning them to the dashboard. For this example, “Filter Top 20 Sorted by Ct Ascending” is selected:




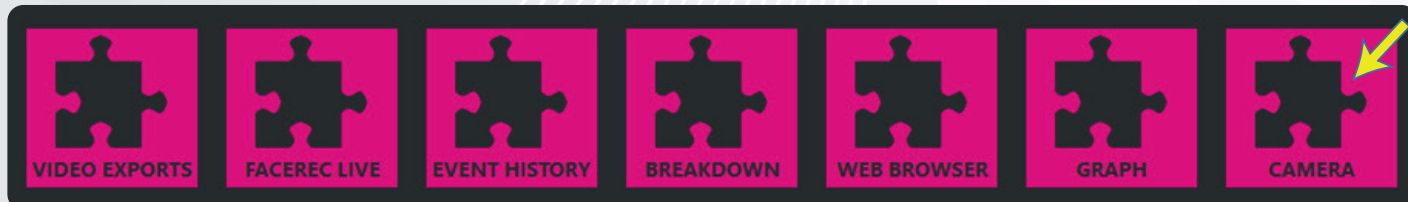
- You can now pin this graph to your dashboard by clicking “Pin To Dashboard” on the top right of the screen. The data on this pie chart can be accessed in two ways. One way is by clicking on the number beside the name of the person. This will bring up the results for the person selected. Another way is to click “Show Dataset” in the upper left corner of the tile. This will take you to the data grid you are used to seeing when looking at data within eConnect.



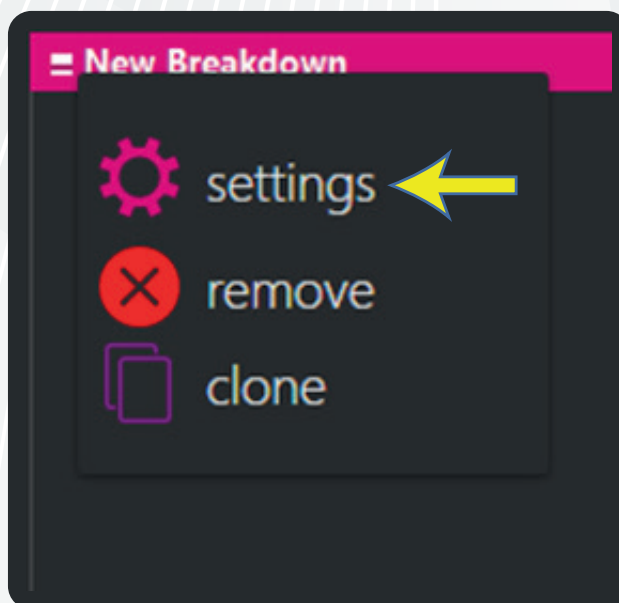
- This process can be done as many times as you would like to create your custom dashboards. There is no limit to the number of dashboards you can create.

Adding a Camera to the Dashboard

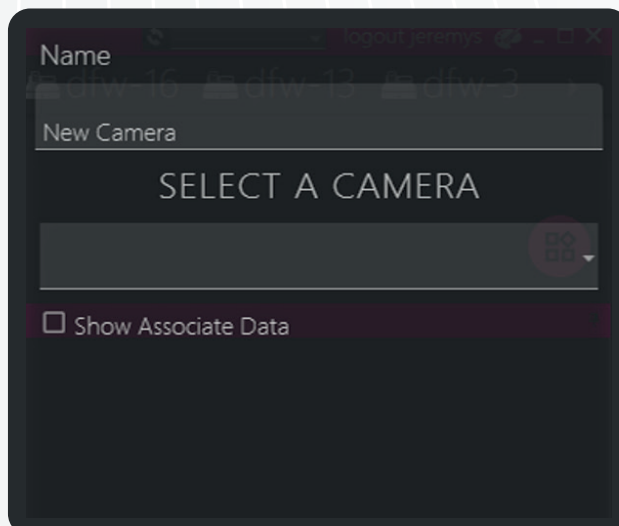
- Start by clicking the add widgets  add widget icon
- Click on the “Camera” widget.



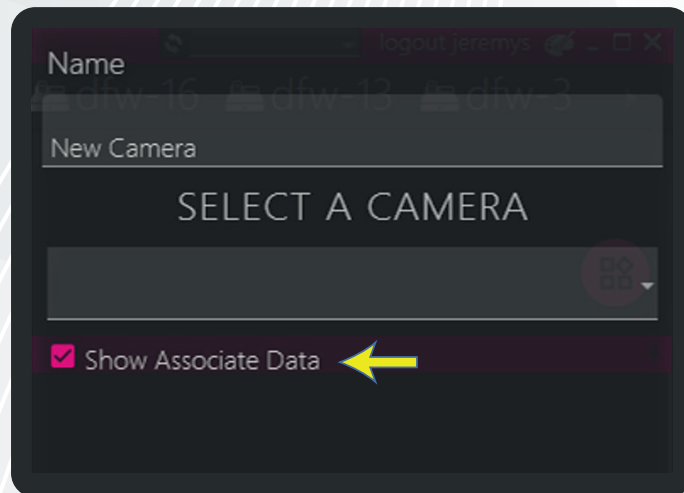
- This will take you to the dashboard and you will see a blank area with the words “New Camera” at the top. Click on the three lines next to “New Camera” to find the camera you would like to add. Then click on “Settings”.



- On the right side of the screen, this window will appear:




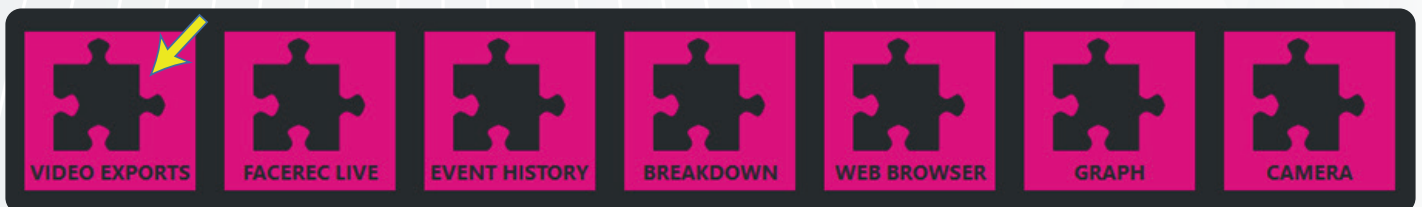
- Use the dropdown menu under where it reads “Select A Camera”. This dropdown menu includes all the cameras you have set up in the eConnect System.
- If you want to include the live register tape with the camera you have selected, you must click the “Show Associate Data” box before saving the camera to the dashboard.



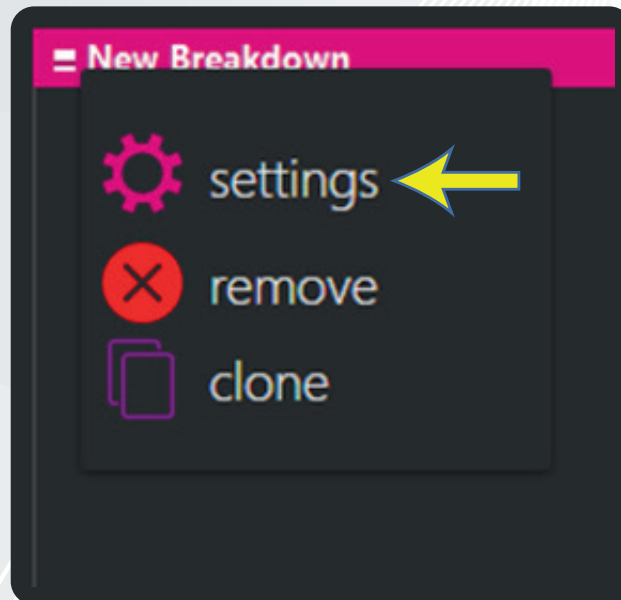
- Once you click “Save”, the camera will appear on your dashboard.

How to Check the Status of Video Exports

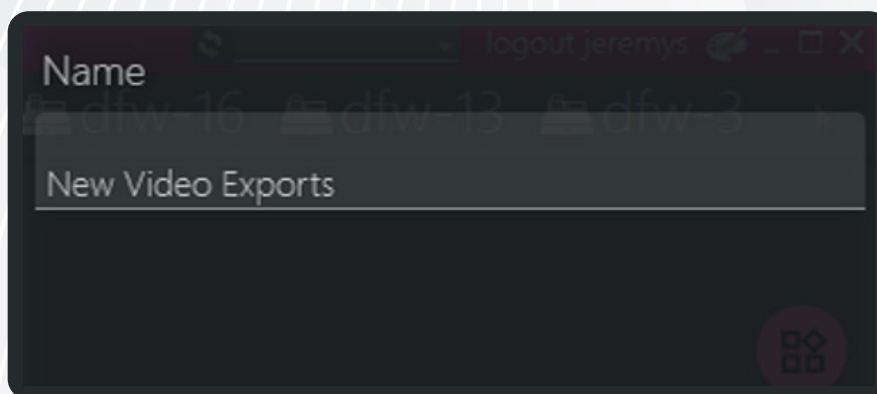
- To check the status of the export. You need to go back to the widget page by clicking on .
- Select the “Video Exports” option:



- This will take you to the dashboard and you will see a blank area with the words “New Video Exports” at the top. Click on the three lines next to “New Video Exports” and then click on “Settings”.




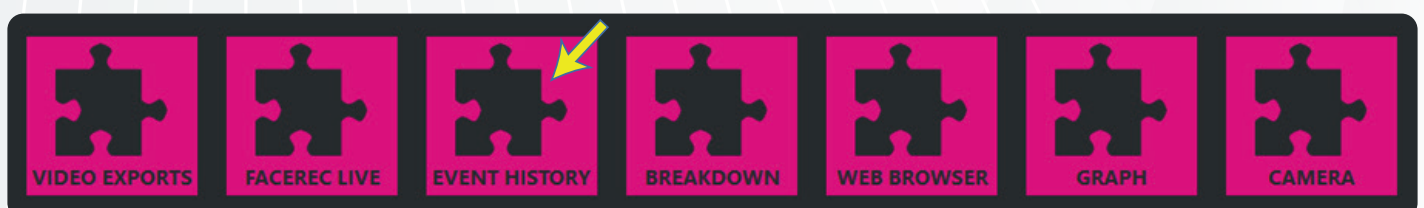
- Here you can change the name of the video exports widget. Click “Save” once you have entered the name you have chosen.



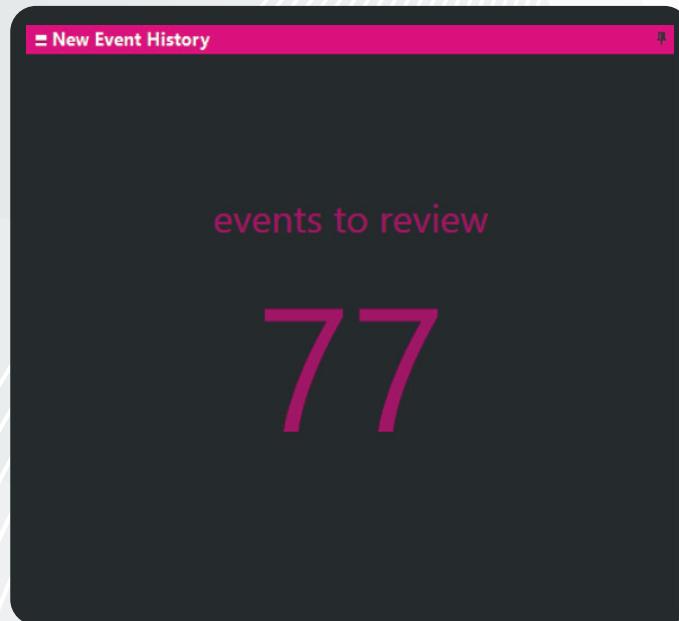
- You will now be able to see the status of any video exports.

How to Add Event History (Red Flags) to Your Dashboard


- There is a way to quickly go to checks that have been marked as high priority (red flag). To do this, click on the add widgets icon 
- Select the “Event History” option



- Your dashboard will now display “Event History” with the number of red flags visible. Click on the number to view the red flag checks.

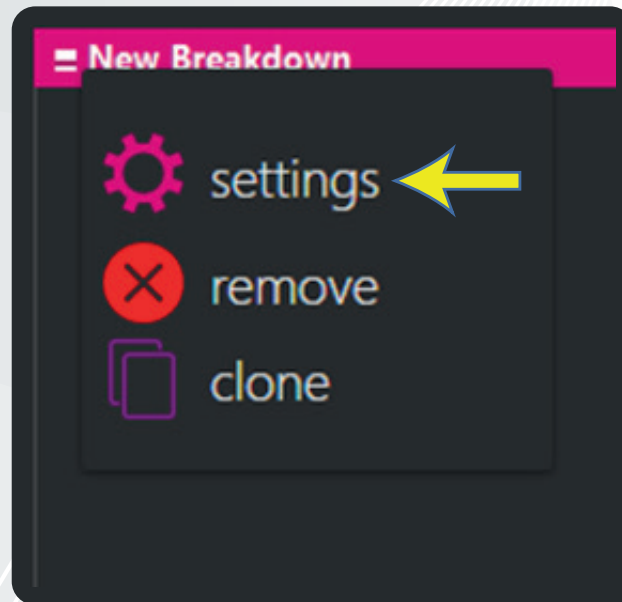


How to Add a Web Browser to Your Dashboard

- You may choose to have quick access to a web page on your dashboard. Note: This option will only work when you are not on a closed network.
- To do this, click on the add widgets icon 
- Select the “Web Browser” option:



- This will take you to the dashboard and you will see a blank area with the words “New Web Browser” at the top. Click on the three lines next to “New Web Browser” and then click “Settings”.




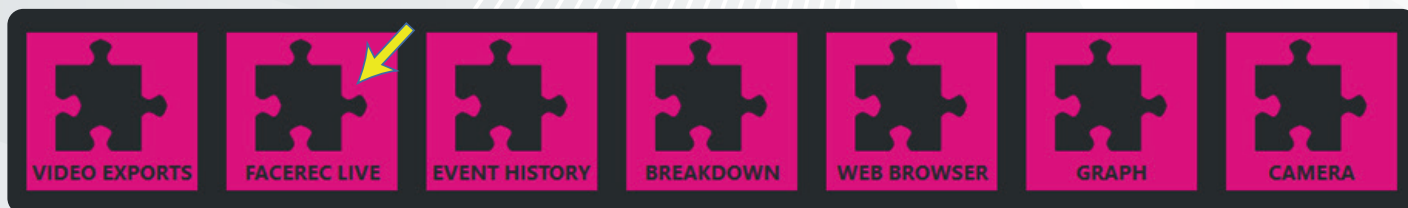
- Here you will enter the name of the website and enter the URL. Hit the “Save” button at the bottom.

A screenshot of a "New Web Browser" form. The form has a dark background. At the top, there's a "Name" field with a placeholder "New Web Browser". Below it is a "Url" field with a placeholder "http://". To the right of the "Url" field is a "DO" button. At the bottom of the form is a "Save" button.

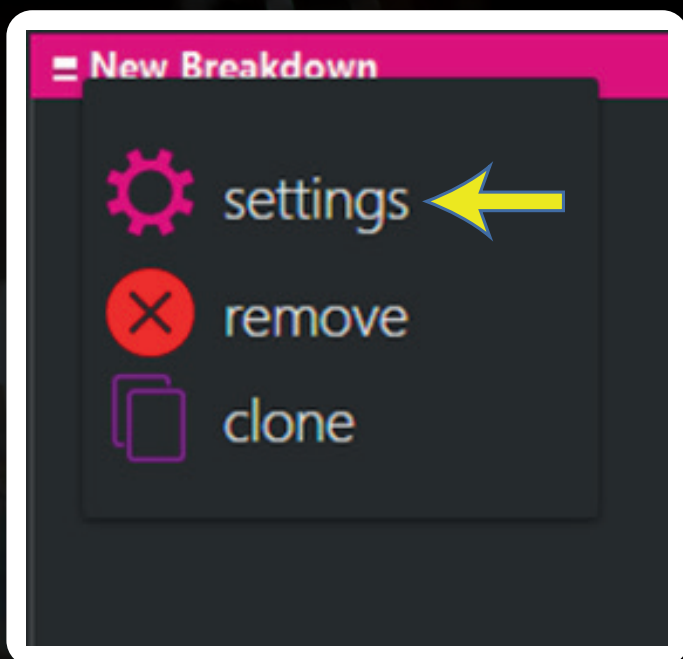
The webpage will now be available on your dashboard for easy access.

How to add a FaceRec Live Tile to your Insights page

- To see a live feed of Faces either based on device and/or tag first start by clicking on 
- Select the "Facerec Live" tile




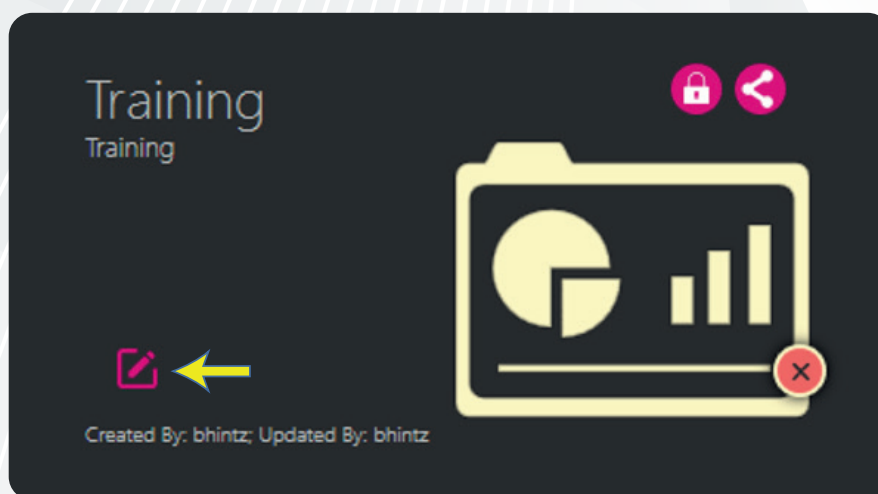
- This will take you to the dashboard and you will see a blank area with the words "No Faces Detected". Click on the three lines next to "New FaceRec Live" and then click on "Settings".




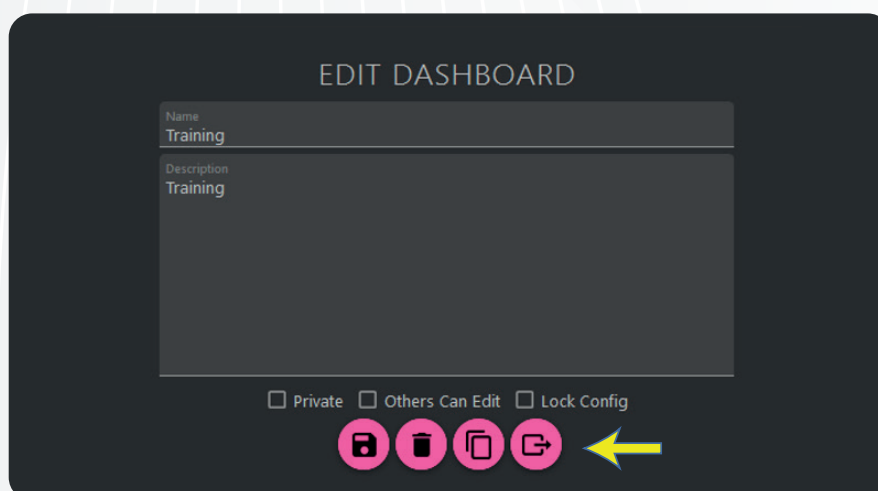
- When clicking on settings you will see this window. At the top, you can Name your widget. Below that you can select tags you would like to see. For example, if you want to see the "Code 0 Watchlist" tag select that and it will only show "Code 0 Watchlist" people. If you would like to see all people don't select a tag. Next, you need to select a detector, you can select one or more by clicking the boxes which select the detectors you would like.



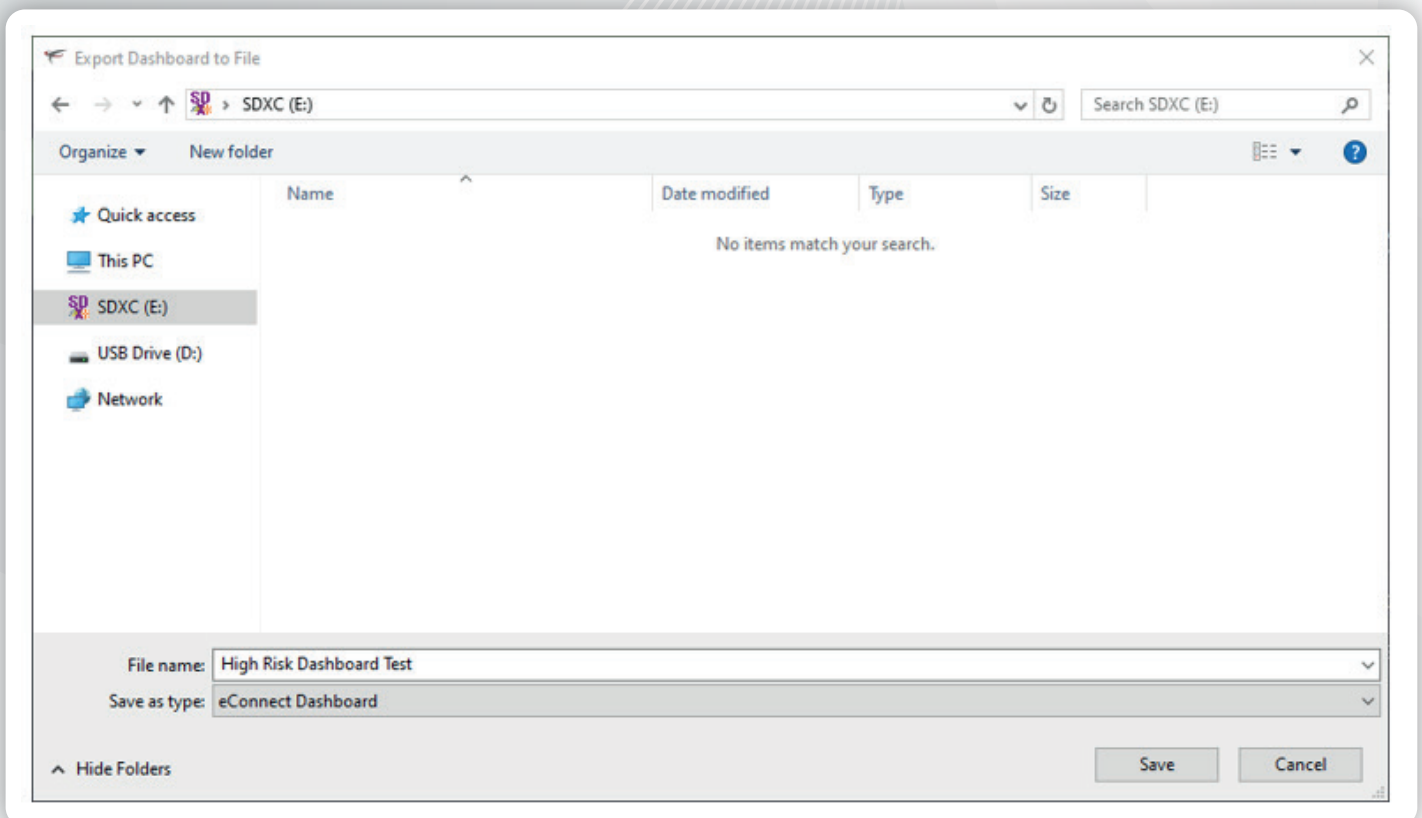
- After selecting the Tags and/or Detectors you will need to click Save to finish the setup. The Screen will continue to show “No Faces Detected” until a face that matches your query shows up. This is a live-only widget and will only show the 20 most recent faces. When opening eConnect the widget will only work from the time you log on and will not show any faces from before then.
- You will now be able to see the status of any video exports.
- You can also import a dashboard that has been saved. Click on “Import Now” and navigate to a saved dashboard on the computer.
- **Note:** to export a saved dashboard that is already created click on Edit Icon 





- You will return to a screen like the one below. You will see an Export Icon like this 

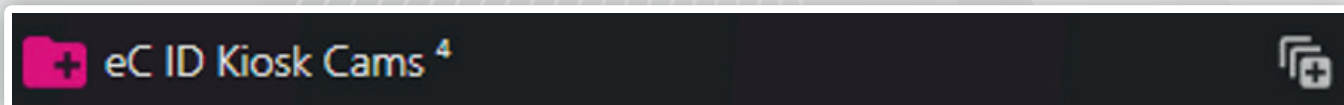




- When you click this icon, you will be able to export any saved dashboard file to your computer.





How to Open a Camera

- Start by clicking on the  cameras tab at the top of the application. (This may have a different title based on your property i.e. "cams")
- On the left side, you will see **AVAILABLE CAMERAS**. Below you will see all the cameras you have access to in eConnect.
- The cameras are in groups. Each group has a folder icon to the left of the group name. Clicking on the  will expand the group showing all the cameras in the group.





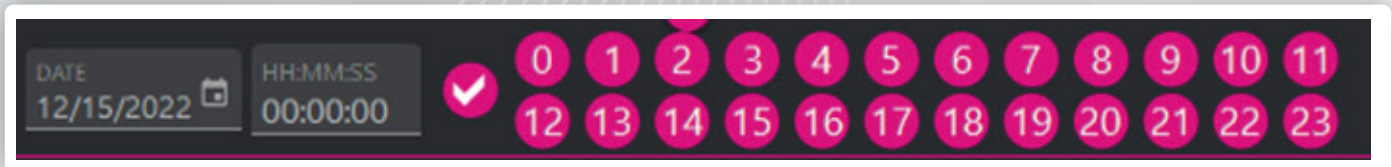
- On the right, there's a number, and further to the right is an  icon (if 12 or fewer cameras are in the group). In the picture above, you see the number 5. This means there are 5 cameras in the group; clicking on this  icon will open all cameras in the group at once.








- To add a camera, you can click on the  on the far right of the name and the camera will open. If you click the  icon next to another camera, you'll add a camera. You can also drag and drop the camera name into the viewing area. If you drag and drop onto another camera, it will replace the existing camera with the new camera at the same time the video was playing on the previous camera.



Camera Control Guide

-  This icon will take your camera & data to live/current time.
-  This icon brings up a calendar allowing you to choose a historical time & date to review video & data. Enter the date and time and click the check to navigate to that specific time. Or click the number (24-hour clock) to take you to that specific hour after a date has been selected.

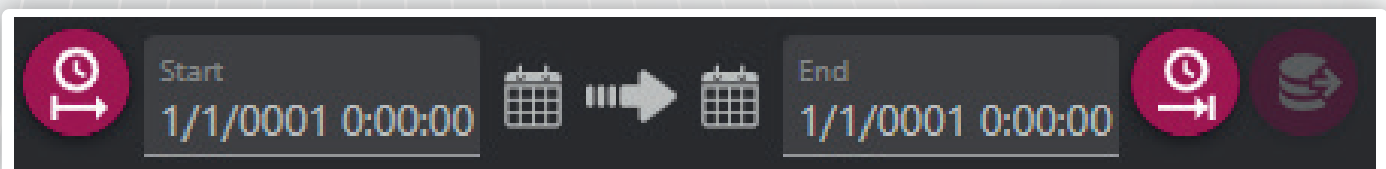




-  This is your standard DVR-type control.
- Pressing the  and  to adjust speed of the video to x2, x4, x8, x16, or x32 speed.
- Use the  and  to jump back or forward in 30-second increments. This is useful when trying to quickly move in small increments.
- This   is your basic pause and play button.
- This slider tool






allows you to manually find the time you're looking for during a 1-hour time frame. Just click, hold the circle, and drag it left or right.

- This icon  opens the case archiving area which allows you to export to your local PC.






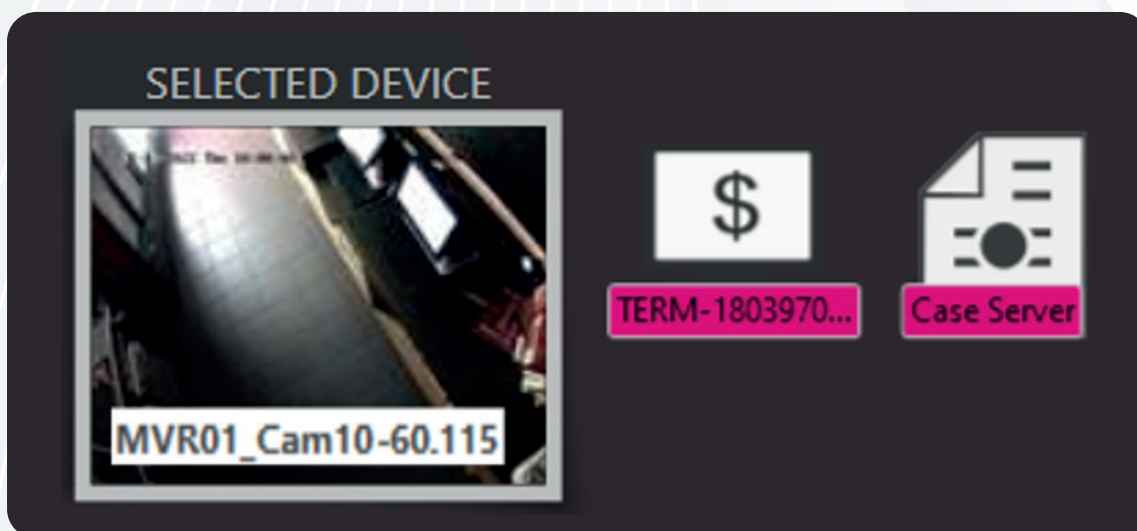
- To archive, the video and data set the start time/date and the end time/date. Then click . Later in the manual, you will learn about the [Case Manager](#). This is the area in which the archived video/data will be stored and accessible if saved using this icon. 





- Use the  icon to take a screenshot of the video.
- The  icon takes you to the "FACEREC" section of eConnect to search via the facial recognition software.
- This icon  will bring you back to the DVR Control Area.

Upper Right Area of Camera Window:

You will see      in the upper right area of the camera window.

- Clicking this icon  will allow you to capture an image of the camera and data view. You can save it to a file or a case.
- Clicking on  will sync all open cameras to the same time as the camera you're currently viewing.
- When selected, this icon  shows you all associated devices on the bottom of the screen. To hide this information, you check the box ☒ Auto Hide




- This icon  will maximize the window.
- This icon  will minimize the window.
- This icon  will close the window.
- Pressing this arrow  on the upper left side of the camera view will release the camera and data out of the eConnect application so you can move it to another monitor or maximize the window.

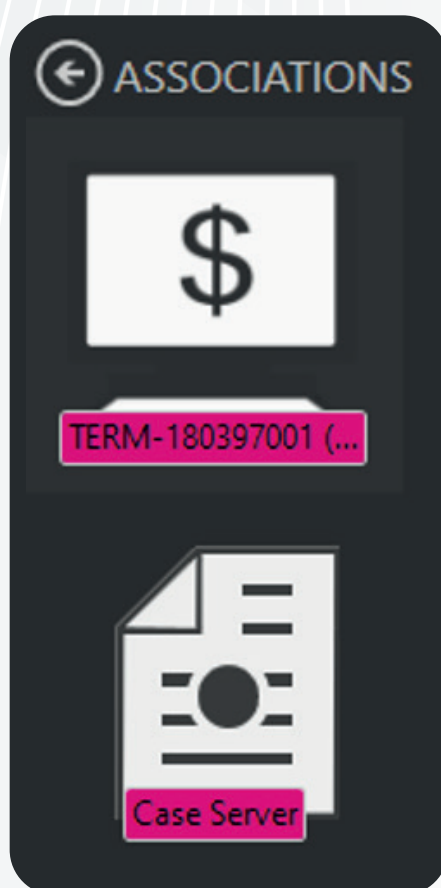
Sync Feature


- At the bottom of the window, you will see a box that can be checked that says "Sync". ☐ Sync ☒ Auto Hide ☐ Once you check the box, the video on all new cameras opened will sync at the same time as the selected camera. To turn off "Sync" just uncheck the box.

Camera Controls - Data Feed Window

This area contains the live data feed which posts each keystroke made at the POS terminal. This is in an interactive area allowing you to click on any line item to rewind the video to that time. Notice the time stamp to the left of each keystroke. This will become a valuable tool in your research.

- By clicking the  icon, you can see all associated devices to the camera you are viewing. If you have multiple terminals in the camera view you can switch between them by clicking on another terminal.



- By clicking the  icon, you can see all associated devices to the camera you are viewing. If you have multiple terminals in the camera view you can switch between them by clicking on another terminal.

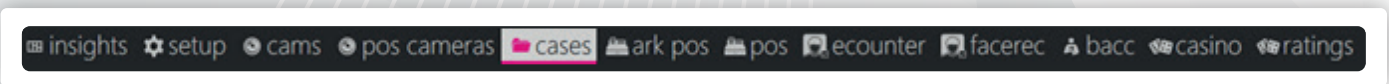
Color Codes

- Red - Menu Items/Modifiers
- Blue - Discounts/Coupons
- Orange - Voids/Transaction Cancels/Error Corrects
- Green - Tenders/Change Due
- Black (Light Theme) or White (Dark Theme) - Standard Register Functions

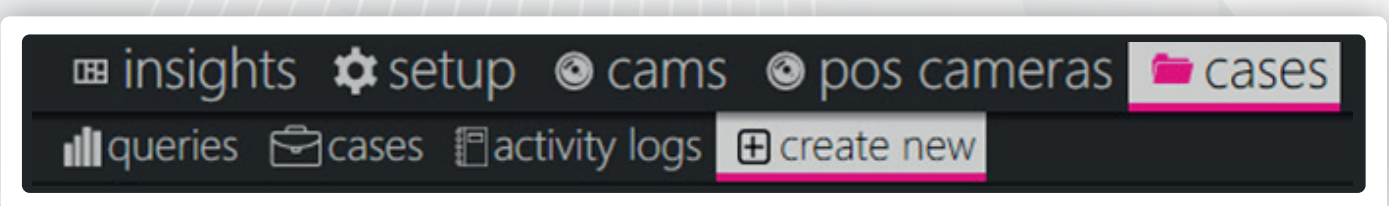
Creating a Case/Activity Log

Cases

When creating a case, there are multiple ways to start. The first way to start a case is to go to the “CASES” tab on the navigation bar.











Once you have entered the “CASES” window a set of tabs below the navigation bar will appear.



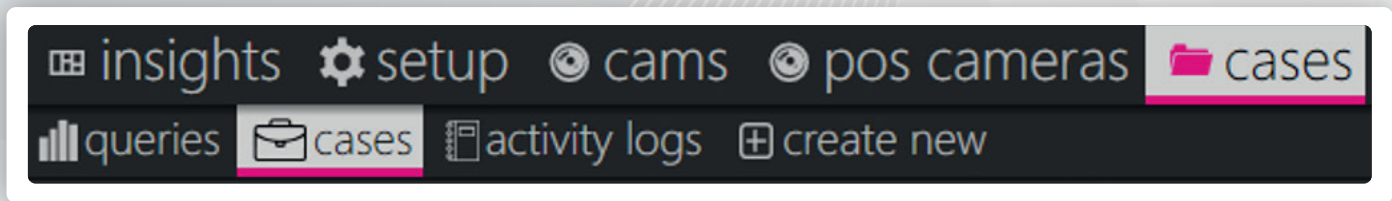
Click on “CREATE NEW” and a new window will appear.

A screenshot of the eConnect application showing the 'New Case' and 'New Activity' forms. The 'New Case' form has fields for Case Title, Description, Incident Type, Location, Reason, Action Needed, Status (Open), Value Case (0.00), Value Total (0.00), and Reference Id. The 'New Activity' form has fields for Activity Title, Description, and Location. Both forms have a 'CREATE' button at the bottom. The 'create new' tab in the secondary navigation bar is highlighted.

- You will have the option to create a “New Case” or “New Activity”. Fill in the CASE TITLE, DESCRIPTION, INCIDENT TYPE, LOCATION, RESOLUTION, STATUS, VALUE CASE, VALUE TOTAL, AND REFERENCE ID as relevant to your case.
- There will be set drop-down menu items already in place at a specific location. If there are no such items, you can manually enter them by clicking on the  Icon on the far right of the section you would like to add/edit. This action is permission based.
-  will appear on the bottom left of the add/edit screen. To add a new description, click  to add a new description and once you finish click on  to save it into the section you wish to add/edit.
- If there is an item that is no longer in use or a mistake has been made, click on the item to be removed then click .
- To make sure all changes are current, click  to refresh the list and  to save all progress.
- Once all areas have been filled click on the “CREATE” button at the bottom center of the New Case section.



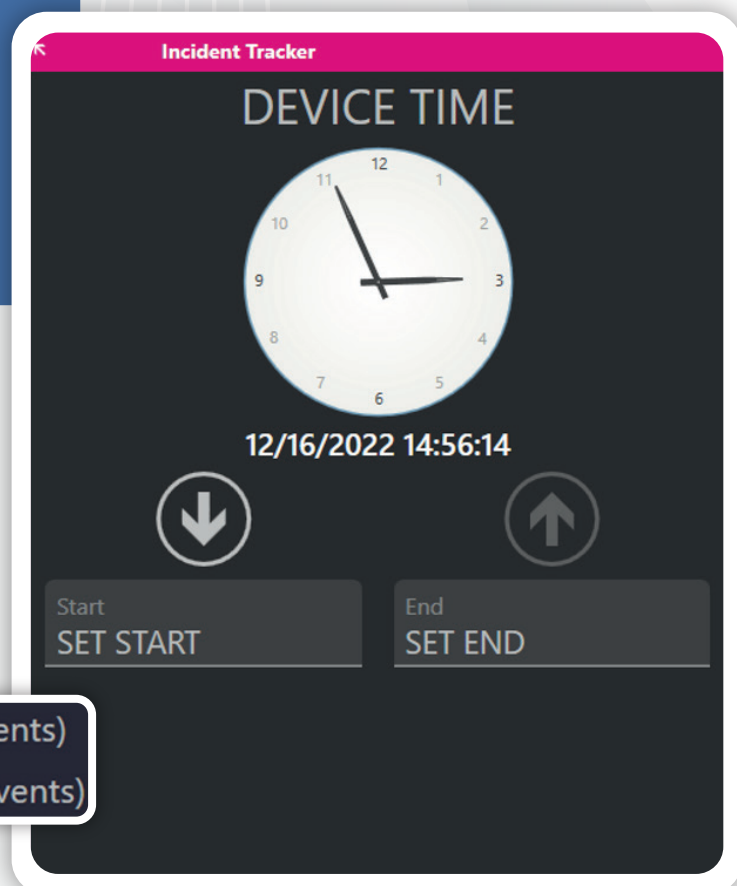
- When the case has been created it will now show up under the “CASES” sub-menu under the navigation bar.



The alternate method of creating a case is inside the camera window while you are starting the process of saving the video.

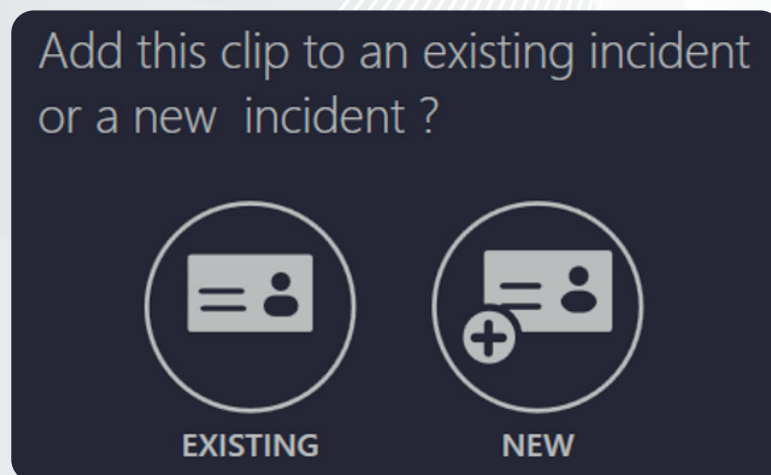
- When you are ready to create a case and want to save the video and data from eConnect, start by clicking on this  icon. You will then see  that represents the “Cases”.

If you have more than one terminal, you can select data from one terminal or all of them.



***Note** - clips will save in thirty-minute increments.

- Next, you will be asked if you would like to add the clip to an existing incident or create a new incident.



- If you are creating a new case, click on “New”. You will be prompted to enter an Incident Name along with a Summary. Both fields are required. “Incident Type” is a drop-down that is optional. Then click “Create”.

←

Incident Tracker

←

NEW MASTER INCIDENT

Incident Name

0 / 50


Summary

Incident Type

PERMISSIONS

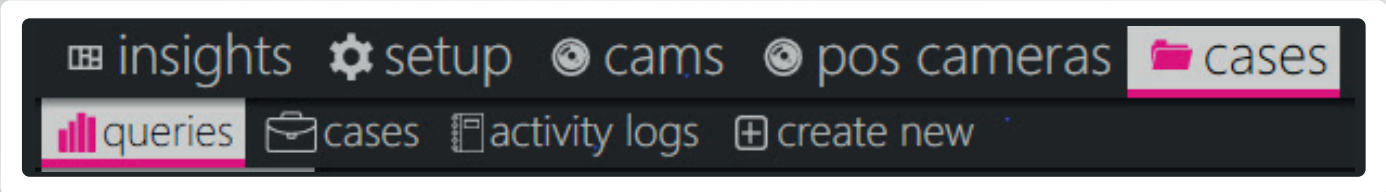
CREATE

SERVER eConnect SaaS 1

- If you have a case already created, click on “Existing”. You will then see a list of all existing cases. To add this clip to an existing case, simply click on the  icon and the clip will be saved in that case file (after you enter the information for the clip).
- Regardless of whether the clip is for a new or existing case, you will need to name the clip you are saving. Enter the Media Name and Media Summary and click “Save”. The clip will begin to export to the Cases tab.
- Clips are saved at a 1:2 ratio.

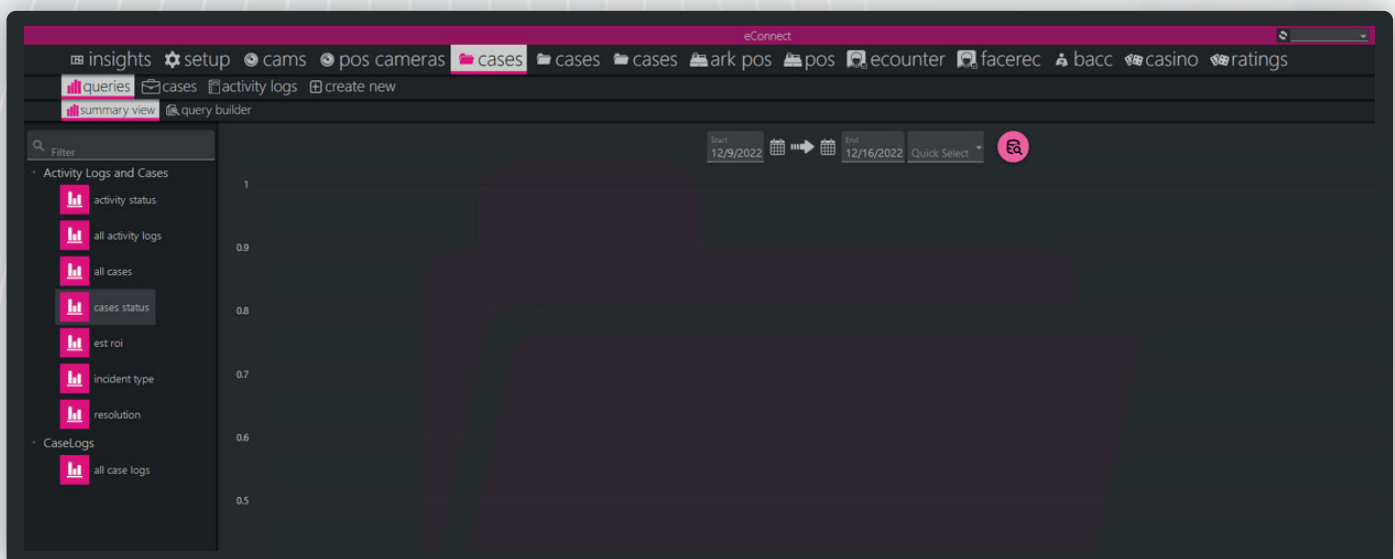
Case Manager

Navigate to the Case Manager by clicking “Cases” on the top navigation bar.




In the camera section you learned how to create a case/incident. Here you will learn how to access the incidents, update notes, and export cases.

The “Summary view” tab is the first screen you will see when clicking the “Cases” button:



- You can look inside each area by clicking over the words like a hyperlink. (i.e. click “all cases”)

- Clicking on the  button will show data from the activity/case in graph form by date in the main section of the window. Multiple graphs may be shown for comparison and each graph bar may be clicked on to show relevant data in a new window.
- A new window and tab will show pertinent information about the area. (i.e. ACTIVITY #, TITLE, DESCRIPTION, LOCATION, STATUS, RESOLUTION, and TYPE to name a few)

ACTIVITY #	TITLE	DESCRIPTION	LOCATION	STATUS	RESOLUTION	TYPE	VALUE CASE	VALUE TOTAL	MEDIA	ATTACH	CREATED	CREATED BY	LAST UPDATED	ACTIVITY # REF	EXT
C202210-0002	ATL EMP-910715	On Tuesday, October 25, 2022, eConnect Investig...	The Grove/ATL	Open	Action Needed	Further Investigation	0	0	1	0	10/25/2022 13:24:32	abitters	10/26/2022 8:12:32	A20221025-0002	
C202209-0004	ATL EMP - #910121	On Wednesday, September 28, eConnect Investig...	The Grove/ATL	Open	Action Needed	Further Investigation	0	0	1	0	9/28/2022 9:18:43	abitters	9/28/2022 11:21:39	0	
C202208-0004	SCL-10 EMP-88079	On Monday, August 15, 2022, eConnect Investigat...	The Grove	Open	Action Needed	Further Investigation	0	0	1	0	8/15/2022 9:49:22	mikaelly	8/16/2022 11:17:36	0	
C202207-0002	VOID	VOID		Open	Action Needed	Internal Theft	0	0	0	0	7/11/2022 14:01:37	jeremys	7/11/2022 14:51:51	A20220711-0002	

- Clicking on an activity # will create a new window and tab with the current activity number, title, description, incident type, location, resolution, status, the value of case/total, and visibility restrictions. Tabs with the summary of the case, along with other information such as video clips, attachments, and comments will be on the top right of the window.

queries cases activity logs create new

A20221219-0001 C202207-0002

Title

VOID

Description

VOID

Black Female Employee - Long Black/Red braids w/ Large White teardrop earrings.

Using multiple log in Emp Id's.

Placing cash and small change in back of pants.

Incident Type

Internal Theft

Location

Resolution

Action Needed

Status

Open

Value Case

0.00

Value Total

0.00

Visibility: NoRestrictions

External Ref #

☐ Closed

Summary Clips (0) Attachments Comments History

VOID


Created By jeremys at 7/11/2022 14:01:37. The parent Incident is [Activity Log 7/11/2022](#)






VOID

Black Female Employee - Long Black/Red braids w/ Large White teardrop earrings.

Using multiple log in Emp Id's.

Placing cash and small change in back of pants.

- Anywhere you see this icon , you can edit. This will be found on the right side of the section for edit if you have the appropriate permissions.

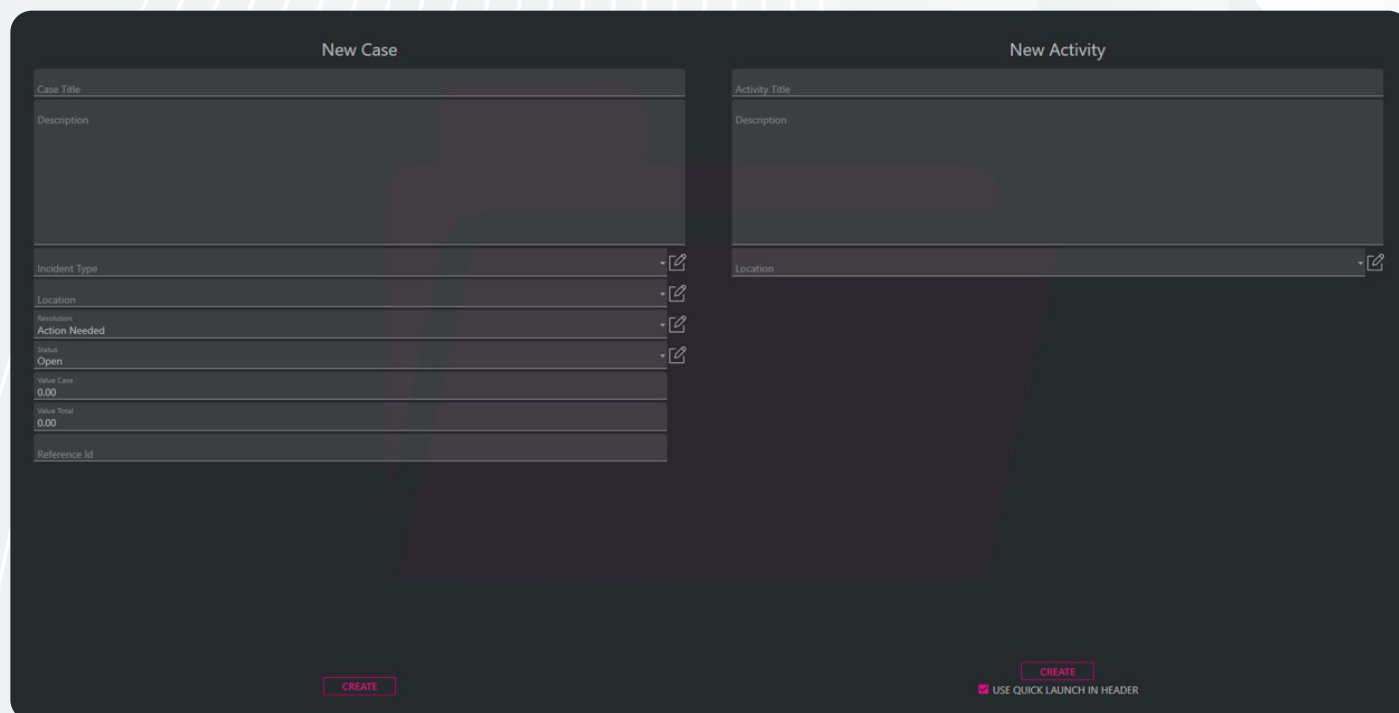
- On the bottom left of the screen, you will see  icons for more options.
- The  icon is used to save all the changes made to the case.
- The  icon is used to delete the case.
- The  icon is used to refresh the case.
- The  icon is used to access print options.

Activity Logs

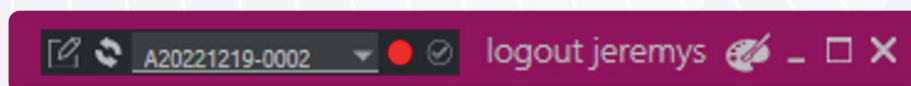
Users can now track their activity in the eConnect system when doing an investigation. This is helpful when you want a recording of how much time they spend each day in the system, as well as how they created a case.



The alternate method to start an activity log is going back to the “CASES” tab and then clicking on the “CREATE NEW” sub-tab. The right side of the window is to start a New Activity instead of a new case explained earlier.



Once a new activity log has been created, the quick-launch bar located on the top-right of the window will change.



You can view other activity logs that are open by clicking on the drop-down arrow.

Or you can go back to the main page to view them in a grid view format.

1/1/1970 0:00:00

12/20/2022 0:00:00

Quick Select

Pivot Results

Aggregate Results

Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
Activity #	Title	Description	Location	Status	Resolution	Type	Value Case	Value Total	Media	Attach	Created	Created By	Last Updated	Activity # Ref	Exti
C202102-0002	ATL EMP - 910715	On Tuesday, October 25, 2022, eConnect Investig...	The Grove/ATL	Open	Action Needed	Further Investigation	0	0	1	0	10/25/2022 13:24:32	abitters	10/26/2022 8:12:32	A20221025-0002	
C202102-0004	ATL EMP - #910121	On Wednesday, September 28, eConnect Invest...	The Grove/ATL	Open	Action Needed	Further Investigation	0	0	1	0	9/28/2022 9:18:43	abitters	9/28/2022 11:21:39		
C202108-0004	SCU-10 EMP-88079	On Monday, August 15, 2022, eConnect Invest...	The Grove	Open	Action Needed	Further Investigation	0	0	1	0	8/15/2022 9:49:22	mikeley	8/16/2022 11:17:36		
C202107-0003	VOID	VOID	Open	Action Needed	Internal Theft		0	0	0	0	7/11/2022 14:01:37	jermeyms	7/11/2022 14:51:51	A20220711-0002	
C202106-0003	eC Test 6-20-22	eConnect Export Test	Open	Action Needed			0	0	1	0	6/20/2022 12:50:18	ledwards	6/20/2022 12:50:28		
C202105-0003	EMP 99941	On Tuesday, May 31, 2022, while reviewing data a...	The Grove/CUS	Open	Action Needed	Internal Theft	15	0	4	0	5/31/2022 15:47:21	pbliters	6/1/2022 14:04:30		
C202102-0003	EWR-1	On Monday, February 7, 2022, eConnect Investa...	The Grove/EWR	Open	Action Needed	Internal Theft	0	0	3	0	2/7/2022 7:40:06	mikeley	2/7/2022 11:44:54	A20220207-0001	
C202101-0003	IAD-1	On February 3rd, 2022, eConnect Investigations re...	The Grove/IAD - All	Open	Action Needed	Internal Theft	1.4	1.4	1	0	1/31/2022 12:23:00	jermeyms	2/7/2022 7:47:04	A20220131-0002	
C202101-0002	IAD-4 - EMP-99060 - Void items	(Investigation still in progress)	Open	Action Needed	Further Investigation		0	2	0	2	1/6/2022 14:58:53	jermeyms	1/6/2022 15:09:01		
C202101-0001	IAD-4 - EMP-99683 - Void item and cash in tip cu	On January 7th, 2022, eConnect Investigations co...	The Grove/IAD - All	Open	Action Needed	Further Investigation	0	2	0	2	1/6/2022 14:44:40	jermeyms	1/7/2022 12:57:03		
C202111-0003	EMP 86725	On Tuesday, November 30, 2021, eConnect Invest...	The Grove	Open	Action Needed	Internal Theft	0	0	14	0	11/29/2021 15:35:18	mikeley	12/2/2021 10:24:26	A20211129-0001	
C202111-0002	EC CUS2 test	Test of CUS2 cameras	Open	Action Needed	Review Request		0	0	0	0	11/15/2021 11:47:41	ledwards	11/15/2021 11:48:15		
C202110-0004	test	On Wednesday, October 19, 2022, eConnect Inves...	Open	Action Needed			0	0	6	0	10/18/2021 13:40:27	ledwards	10/18/2022 15:04:20		
C202110-0003	Testing export	new	Open	Action Needed			0	0	4	0	10/15/2021 10:19:39	rdschue	10/16/2021 16:13:50		
C202110-0002	CUS 2	On Friday, October 15, 2021, eConnect investigat...	The Grove/CUS	Pending	Action Needed		0	0	2	0	10/15/2021 8:26:02	mikeley	10/15/2021 9:07:26	A20211014-0001	
C202109-0001	PHL - 1 Employee #8729	On Thursday, September 16th, 2021, eConnect inv...	The Grove	Open	Action Needed	Further Investigation	0	0	3	0	9/16/2021 9:51:10	abitters	9/30/2021 10:41:46	A20210916-0002	
C202108-0002	EMP-97992 EWR-1	On Tuesday, August 31, 2021, eConnect Investigat...	The Grove/EWR	Open	Action Needed	Internal Theft	0	0	1	0	8/31/2021 8:25:03	mikeley	9/2/2021 9:25:26	A20210831-0001	
C202107-0004	7-27-21 Test	Making a video export test	Open	Action Needed			0	2	0	2	7/27/2021 9:35:45	ledwards	7/27/2021 9:43:10		
C202107-0003	eConnect TEST	eConnect TEST	Open	Action Needed			0	0	4	0	7/19/2021 15:54:12	bhlitz	7/19/2021 16:37:44		
C202107-0002	CUS JM POS TEST	Testing exports on CUS JM POS TEST	Open	Action Needed			0	1	1	0	7/19/2021 12:49:03	ledwards	7/19/2021 16:34:32		
C202107-0001	7-13 Incident - test	Test export of incident from 7-13	Open	Action Needed	Risk Management		0	1	0	1	7/15/2021 8:51:16	ledwards	7/15/2021 10:11:46		
C202106-0002	test21	Open	Open	Action Needed			0	3	0	3	6/18/2021 8:38:05	bhlitz	6/22/2021 9:09:07		
C20208-0001	August Test	test	Open	Action Needed			0	1	0	1	8/13/2020 10:54:55	rdschue	8/13/2020 10:54:58		
C202001-0002	IAD-4 #98973	On January 23, 2020, eConnect Investigations obs...	The Grove/IAD - All	Pending	Action Needed	Further Investigation	0	0	1	5	1/23/2020 14:05:49	jermeyms	1/23/2020 15:12:37		
C201909-0001	test	test	Open	Action Needed			0	0	2	0	9/6/2019 7:57:19	pbliters	1/10/2020 13:57:45	A20190906-0001	
C201907-0003	IN20190000409	EMP-98293 voids off lemonade and customer lea...		Open			0	0	2	0	7/17/2019 9:38:22	abitters	7/18/2019 7:17:02		
C201907-0002	IN20190000386	98428, transaction cancel		Open			0	1	1	0	7/11/2019 10:33:37	NA	7/11/2019 11:29:04		
C201907-0001	IN20190000361	EMP-88020 giving away product		Open			0	1	1	0	7/2/2019 8:22:32	melodieb	7/2/2019 8:22:46		
C201906-0002	EMP-96656 - slc-4 - IN20190000350	Ringin up food item with employee discount foll...		Open			0	3	0	3	6/27/2019 7:11:22	jermeyms	6/27/2019 13:16:14		
C201905-0002	IN20190000259	Products served without payment		Open			0	0	2	0	5/28/2019 7:38:22	NA	5/28/2019 12:04:53		
C201903-0003	IN20190001163	1 unknown female, customer's handoin not about		Open			0	1	0	1	3/20/2019 12:46:45	melodieb	3/20/2019 12:46:43		

SUM

AVG

MIN

MAX

Page 1

of 2 - (59 records)

CaseValue 16.4 EstimatedLifetimeValue 1.4

Query Time: 432ms

Downloading video from Cases

- You can play videos associated with a case by locating and clicking the “CLIPS” tab, then clicking on the thumbnail. A drop-down menu will appear with the option to, PLAY, EDIT, DOWNLOAD, OR DELETE.

Summary

Clips (2)

Attachments

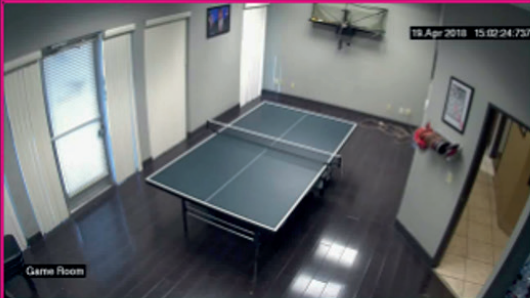
Comments

History

Filter


Game Room

19 Apr 2018 15:02:24.737



TW Test 3

4/19/2018 3:02:26 PM to 4/19/2018 3:02:57 PM



test

6/22/2018 11:50:46 PM to 6/22/2018 11:50:49 PM

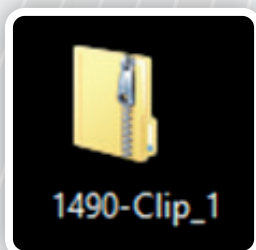
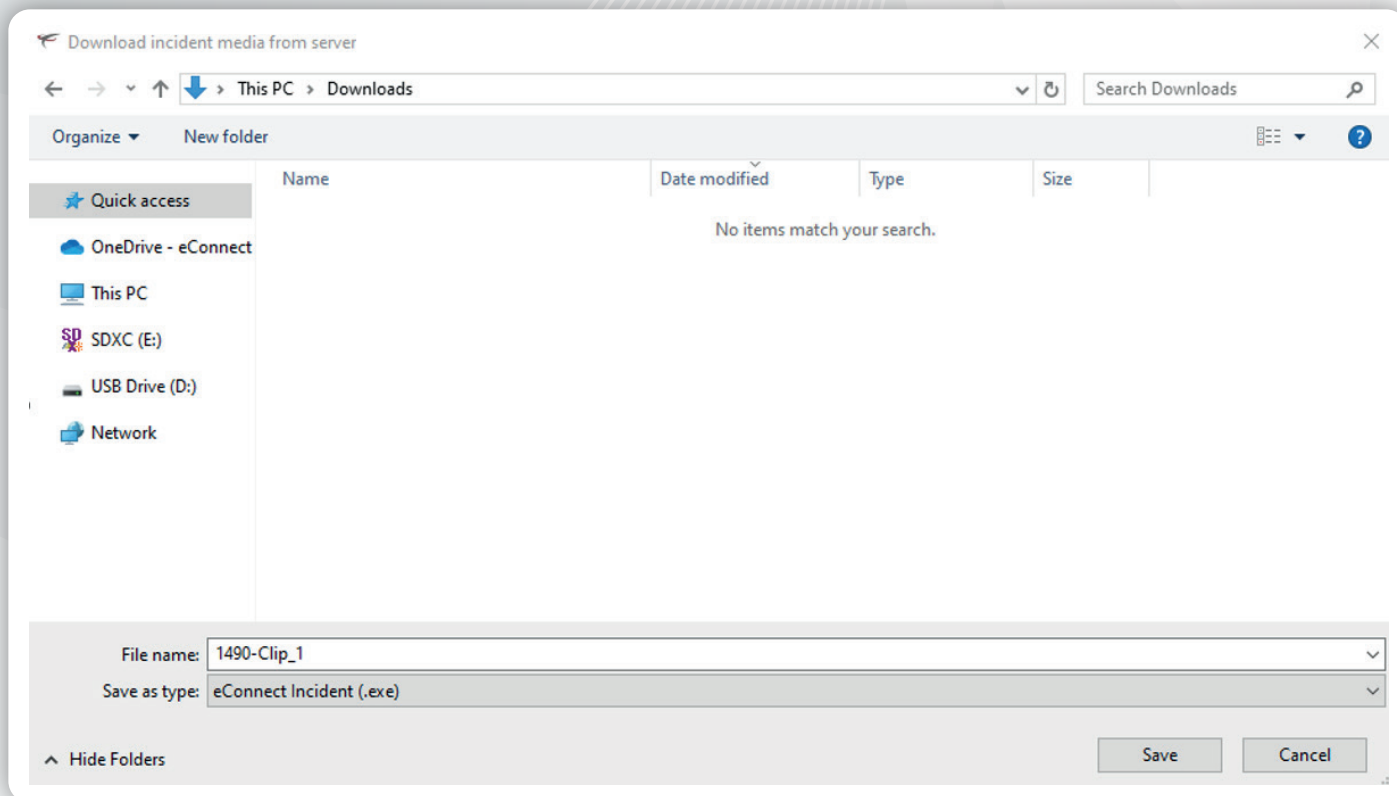
▶ Play

📎 Edit

⬇ Download

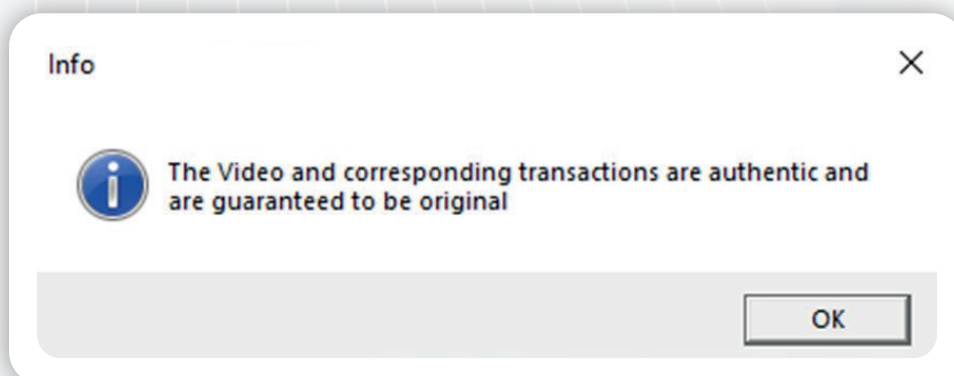
✖ Delete

- If you wish to download a video to a USB drive or other location, you can click “DOWNLOAD” at the drop-down menu. You will see a windows screen pop up asking where you want to save the file.

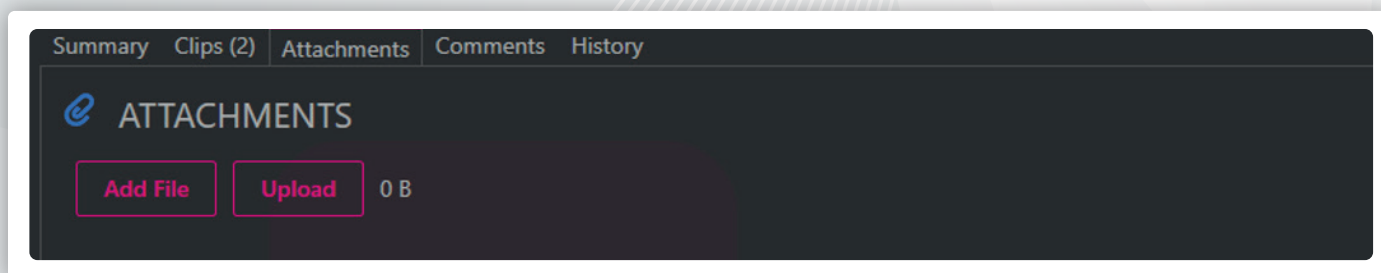


The type of file downloaded will be an executable file (.exe) in zip format to save space. All controls are built into the zip file.

If you unzip the file you will lose the virtual watermark. by clicking on the lock you will see the following message

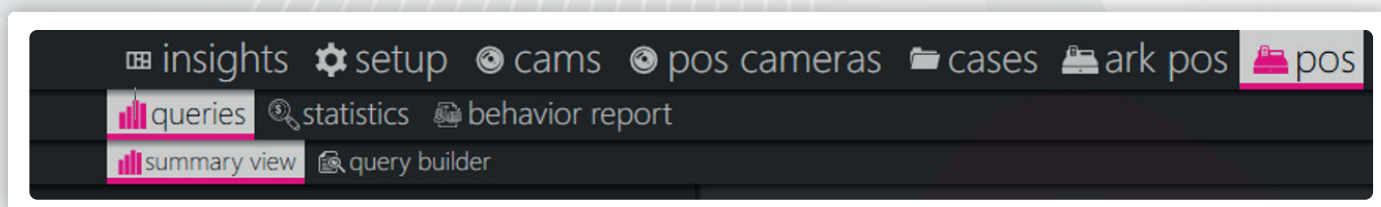


- You can upload additional notes, photos, or reports to your video evidence. This will ensure you have all your information in one location.

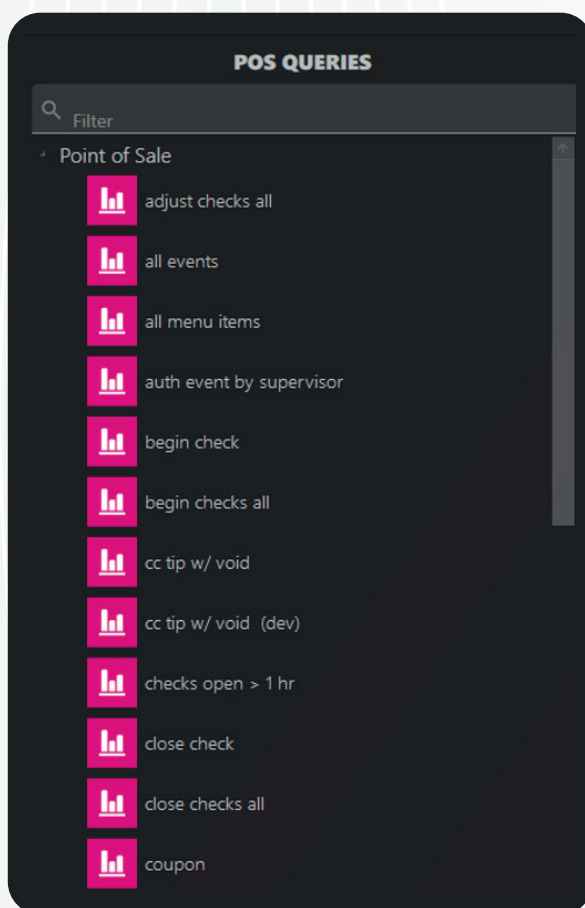



POS - Summary View

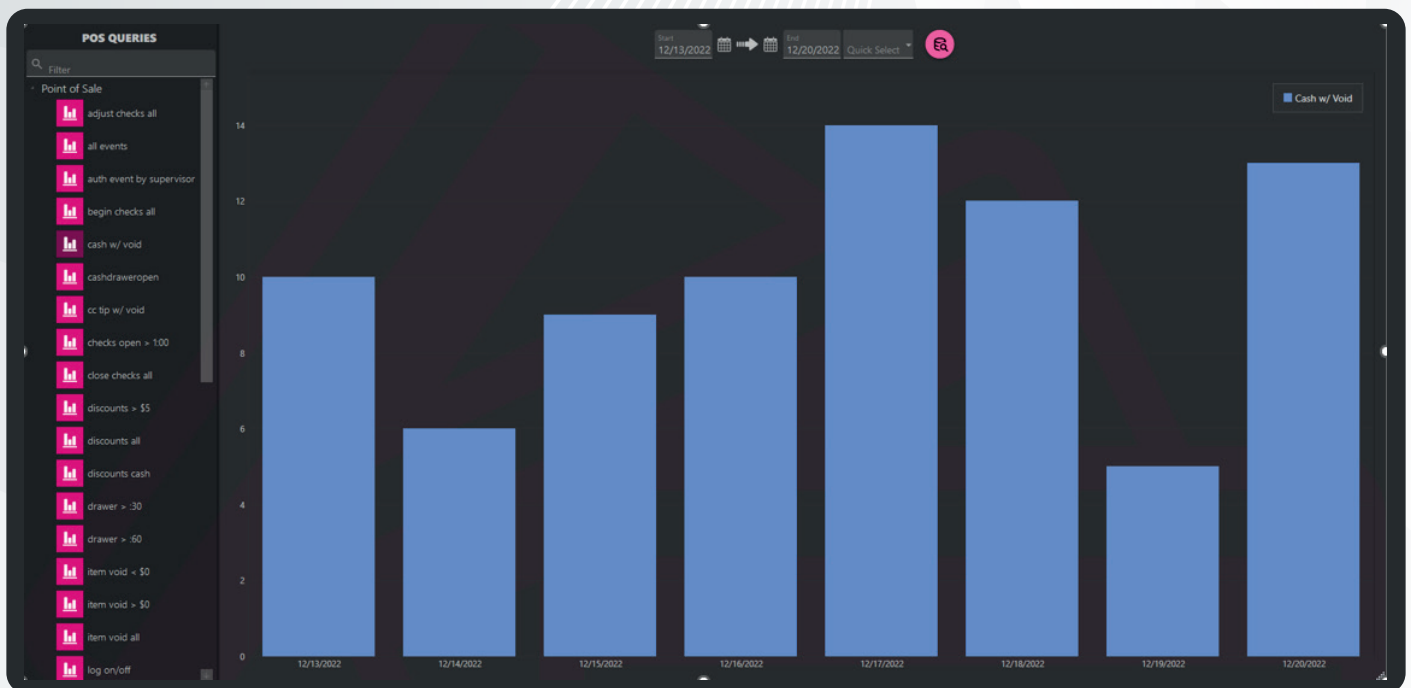
Navigate to this area by clicking on “POS” at the top of your navigation bar. Then click “Queries” and “Summary View”.



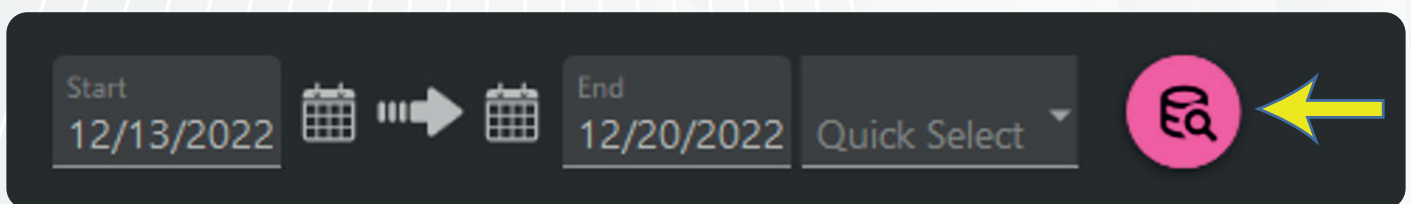
This is one of the most powerful areas of the eConnect system. The POS Queries are saved custom queries created for your specific location and POS system.



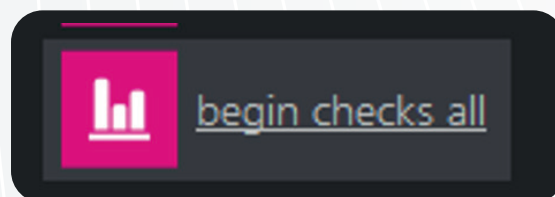
- Selecting this icon  allows you to populate the colored line graphs to the right. You can see if there is a spike in certain transaction types on a given day. Each colored line has the drill-down capability. Clicking on the bar of the graph for the day you want to see will take you to the grid page.



- At the top of the page is where you can either adjust the date range or select a preset time frame using the drop-down tool. Select your date range/time frame and click "Apply". Just selecting a time frame from the menu does not automatically populate that time.



- If you do not want to graph the data and instead wish to go directly to the query information, simply click on the query title and it will bring you directly to the grid page.



- Once this data populates you can adjust the time frame using either the calendar or the drop-down menu at the top.

Analyzing the Grid Reports




Once you've drilled into one of the charts from the previous section, you will see the results of that query in grid view.



Attributes


- Columns can be sorted by clicking the dark-shaded header and/or using the dropdown to filter data. This is a good tool when looking for a check, terminal, employee, or other various items. You may also drag the dark shaded area of the column to the right or left to align your data columns in any way you prefer to view them.


BASIC DATA	TIME	TERMINAL NAME	TERMINAL #	EMPLOYEE #	EMPLOYEE NAME	REVENUE NAME	REVENUE #	CHECK #	

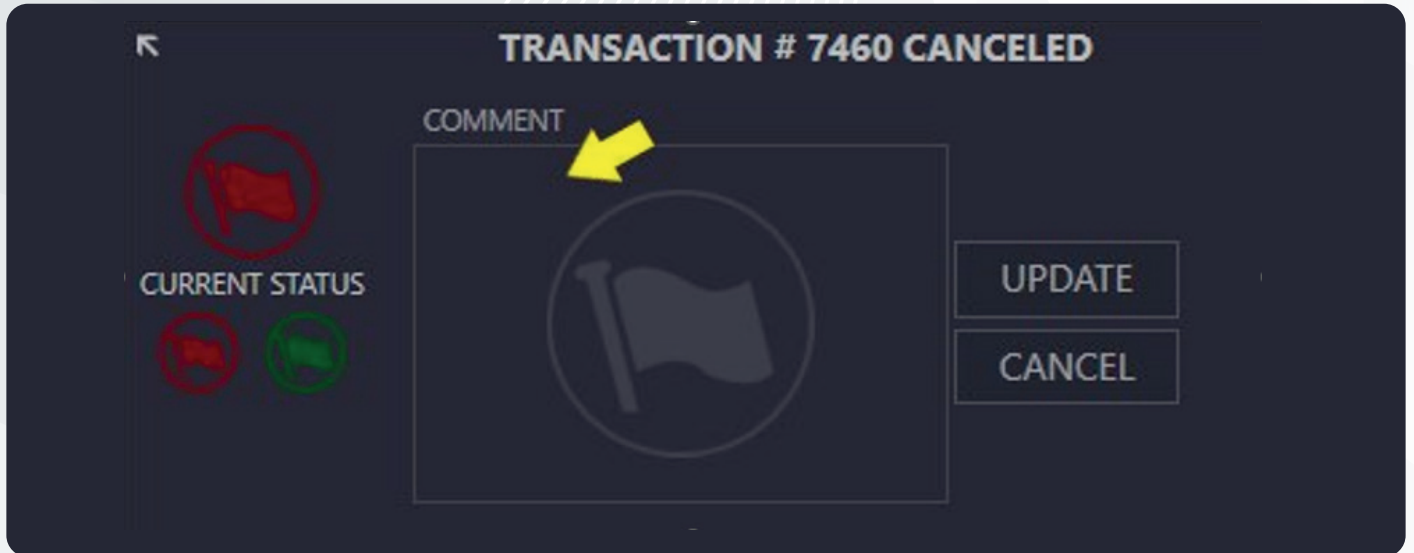
Flags


- Once you drill down one of the custom queries from the Summary View screen, you should see this icon  in the Associations column to the far left. If any row is missing this  icon, then there is no camera associated with that POS terminal. In that case, you will see this icon  which is a virtual register tape. If you are sure there should be a camera associated, contact your onsite eConnect admin or call the eConnect Support team at **(702) 523-8786** and select option **2**.

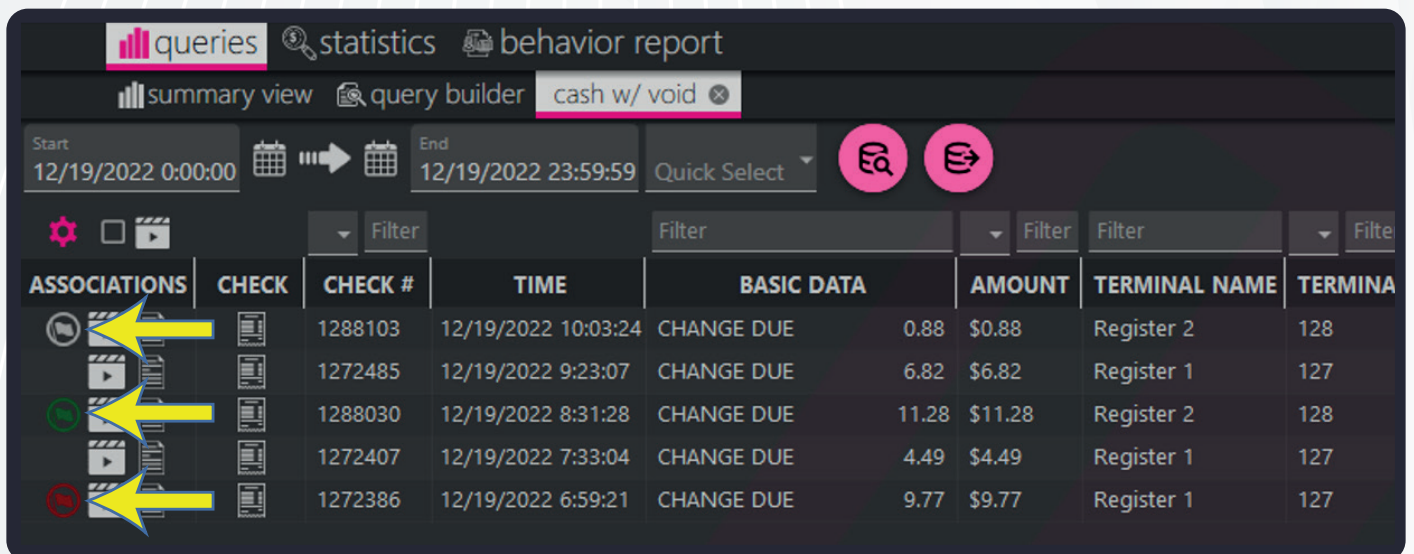
If you hover your mouse over the camera icon , you will see a snapshot of the historical video and data. If you hover over the register tape icon , you will see the virtual register tape. This is a useful tool to quickly assist you in determining if a questionable transaction is a theft, human error, or a business anomaly.











By simply reviewing the video or the virtual check for a few seconds, the session will be flagged black (white theme) or gray (dark theme)  to let other users know someone has reviewed the transaction.

- Clicking the red flag  indicates you have found a problem, potential theft, policy issue, or human error. Turning the flag red will allow other investigators to see you have reviewed the transaction and have found something worth looking at. Notes can be added by managers, supervisors, and those on other shifts in the Comment box.

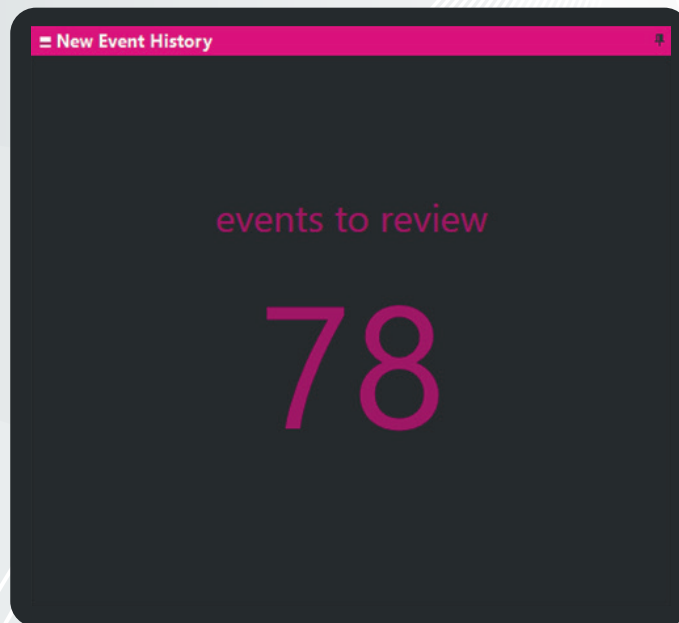


- Clicking the  green flag indicates you have reviewed the video and have found the transaction to be normal or justified with no further action needed. Notes can be added in this comment section as well.



ASSOCIATIONS	CHECK	CHECK #	TIME	BASIC DATA	AMOUNT	TERMINAL NAME	TERMINA
		1288103	12/19/2022 10:03:24	CHANGE DUE	0.88 \$0.88	Register 2	128
		1272485	12/19/2022 9:23:07	CHANGE DUE	6.82 \$6.82	Register 1	127
		1288030	12/19/2022 8:31:28	CHANGE DUE	11.28 \$11.28	Register 2	128
		1272407	12/19/2022 7:33:04	CHANGE DUE	4.49 \$4.49	Register 1	127
		1272386	12/19/2022 6:59:21	CHANGE DUE	9.77 \$9.77	Register 1	127

- All red flags are pending reviews that can be found on the “Event History” tile if you have added it to your dashboard.



Aggregation

The Aggregate function is one of the tools you will use to drill down into large amounts of data. Once you have a data set you would like to analyze, you can aggregate (or group) the data. To aggregate, click the “Aggregate” icon in the upper right-hand corner.

The screenshot shows the eConnect POS Connect interface with a list of transactions. The interface includes a top navigation bar with various icons and a search bar. The main area displays a table of transactions with columns for ASSOCIATIONS, CHECK, CHECK #, TIME, BASIC DATA, AMOUNT, TERMINAL NAME, TERMINAL #, EMPLOYEE NAME, EMPLOYEE #, REVENUE NAME, REVENUE #, QUANTITY, GROUP #, and EVENT #. A yellow arrow points to the 'Aggregate' icon in the top right corner of the interface.

ASSOCIATIONS	CHECK	CHECK #	TIME	BASIC DATA	AMOUNT	TERMINAL NAME	TERMINAL #	EMPLOYEE NAME	EMPLOYEE #	REVENUE NAME	REVENUE #	QUANTITY	GROUP #	EVENT #
		0	12/28/2022 15:08:13	SIGN OUT	\$0.00	Register 1	127	EMP-6540	6540	RC-387	387	0	0	21
		0	12/28/2022 15:08:07	SIGN IN	\$0.00	Register 1	127	EMP-6540	6540	RC-387	387	0	0	20
		0	12/24/2022 9:01:17	SIGN OUT	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	21
		0	12/24/2022 9:00:25	SIGN OUT	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	21
		0	12/24/2022 8:57:19	CASH DRAWER OPEN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	32
		0	12/24/2022 8:57:19	LOG OFF CASH DRAWER	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	21
		0	12/24/2022 8:57:02	CASH DRAWER OPEN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	32
		0	12/24/2022 8:57:02	LOG ON CASH DRAWER	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	20
		0	12/24/2022 8:57:01	CASH DRAWER OPEN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	32
		0	12/24/2022 8:57:01	LOG OFF CASH DRAWER	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	21
		0	12/24/2022 8:56:56	SIGN IN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	20
		0	12/24/2022 8:56:53	SIGN OUT	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	21
		0	12/24/2022 8:56:40	CASH DRAWER OPEN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	32
		0	12/24/2022 8:56:40	LOG OFF CASH DRAWER	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	21
		0	12/24/2022 8:56:35	CASH DRAWER OPEN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	32
		0	12/24/2022 8:56:35	LOG ON CASH DRAWER	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	20
		0	12/24/2022 8:56:33	SIGN IN	\$0.00	Register 1	127	EMP-92206	92206	RC-387	387	0	0	20
		0	12/24/2022 8:56:13	CASH DRAWER OPEN	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	32
		0	12/24/2022 8:56:13	LOG OFF CASH DRAWER	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	21
		0	12/24/2022 8:56:05	SIGN IN	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	20
		0	12/24/2022 8:54:01	SIGN OUT	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	21
	1289715	12/24/2022 8:50:13	CLOSE CHECK	1289715	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	5
	1289715	12/24/2022 8:50:13	CHANGE DUE	13.82	\$13.82	Register 2	128	EMP-910391	910391	RC-387	387	0	0	35
	1289715	12/24/2022 8:50:13	TENDER: Cash	20.00	\$20.00	Register 2	128	EMP-910391	910391	RC-387	387	1	0	26
	1289715	12/24/2022 8:50:13	TOTAL DUE	6.18	\$6.18	Register 2	128	EMP-910391	910391	RC-387	387	0	0	37
	1289715	12/24/2022 8:49:54	DISCOUNT	(0.64)	(\$0.64)	Register 2	128	EMP-910391	910391	RC-387	387	1	0	6
	1289715	12/24/2022 8:49:53	4 Donut	6.36	\$6.36	Register 2	128	EMP-910391	910391	RC-387	387	4	0	11
	1289715	12/24/2022 8:49:53	BEGIN CHECK	1289715	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	2
	0	12/24/2022 8:49:21	SIGN IN	910391	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	20
	0	12/24/2022 7:53:46	SIGN OUT	910391	\$0.00	Register 2	128	EMP-910391	910391	RC-387	387	0	0	21

Amount: 42,008.49 Quantity: 5,960

Page 1 of 447 - (13407 records)

Query Time: 202ms

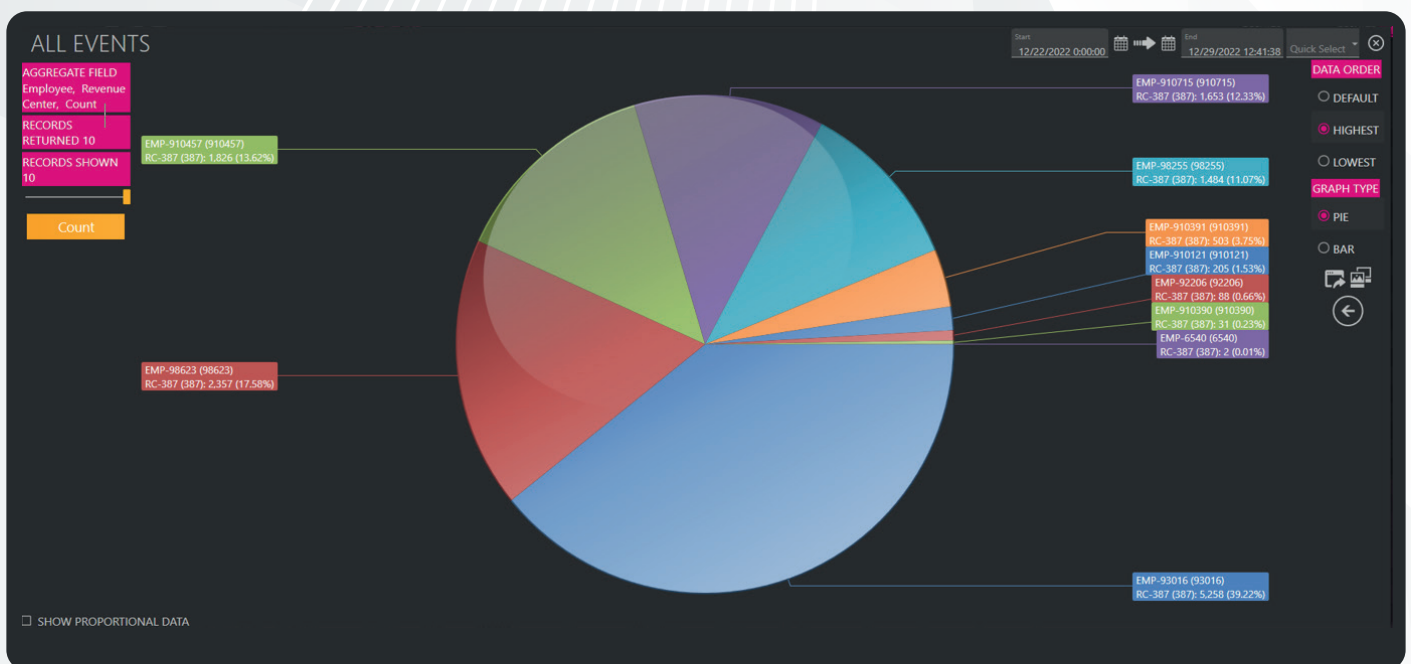
- The next screen you'll see will look like this:

- The “Aggregate” tab at the top is the same as the previous version for those who prefer aggregation without grouping.
- The new “Aggregate Grouping” (like on the Dashboard) will allow you to select multiple grouping fields at the same time. If you select Employee and Revenue Center, it will look like this:

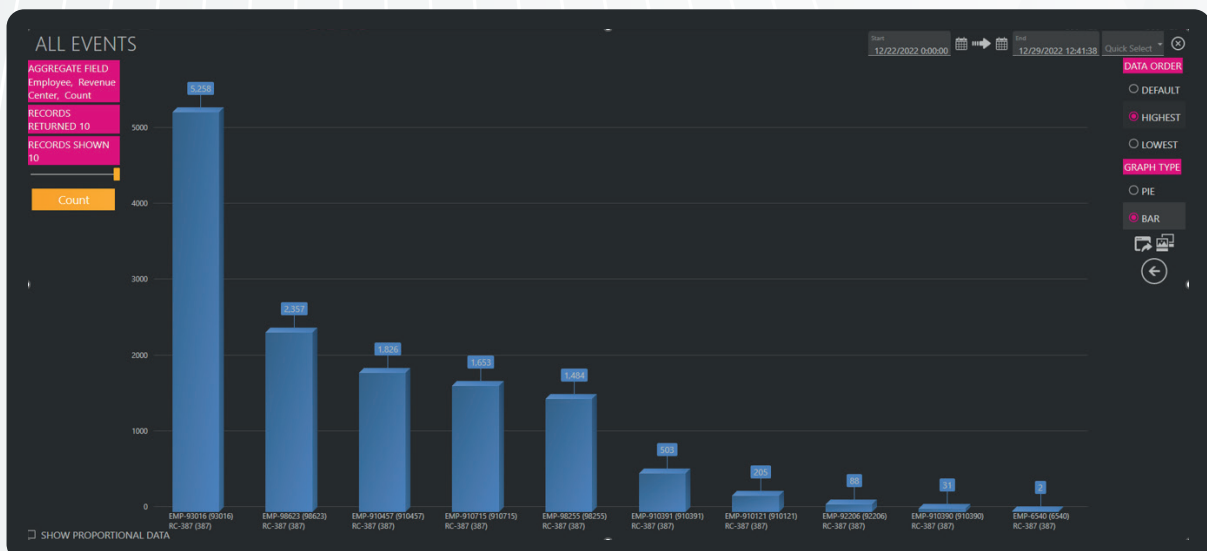
- This will group the data by employee first, then revenue center. By clicking on “Count” in the bottom left corner the results will be displayed.



Aggregation - The Pie Chart

- After the pie chart populates you will see the portion each employee is responsible for. You can quickly see who stands out. In the example below, the employee with the largest blue wedge has the most discounts for the time period selected. The next step is to drill into the pie chart by clicking on any piece of the pie for the employee you want to review.
- You can keep the data breakdown as a pie chart or switch it to a bar graph under "Graph Type". You can select the highest, lowest, or default on how you want the data displayed under "Data Order". You can select how many records you want to be displayed under "Records Shown".



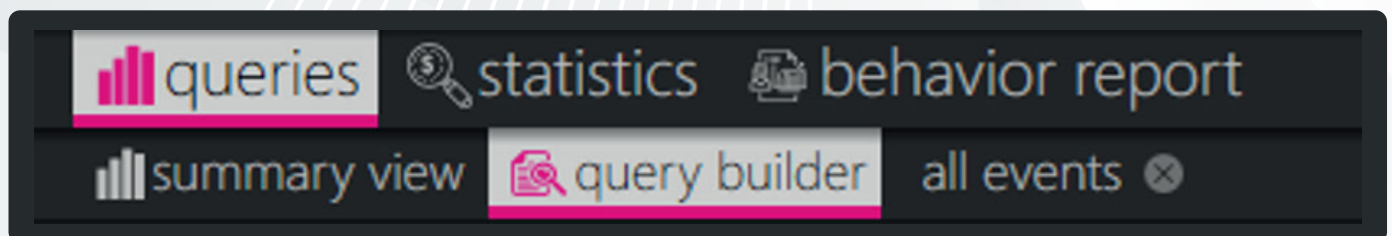
- If you would prefer to see the Aggregation in a bar graph, just click on the "Bar" button and the graph will look like this:



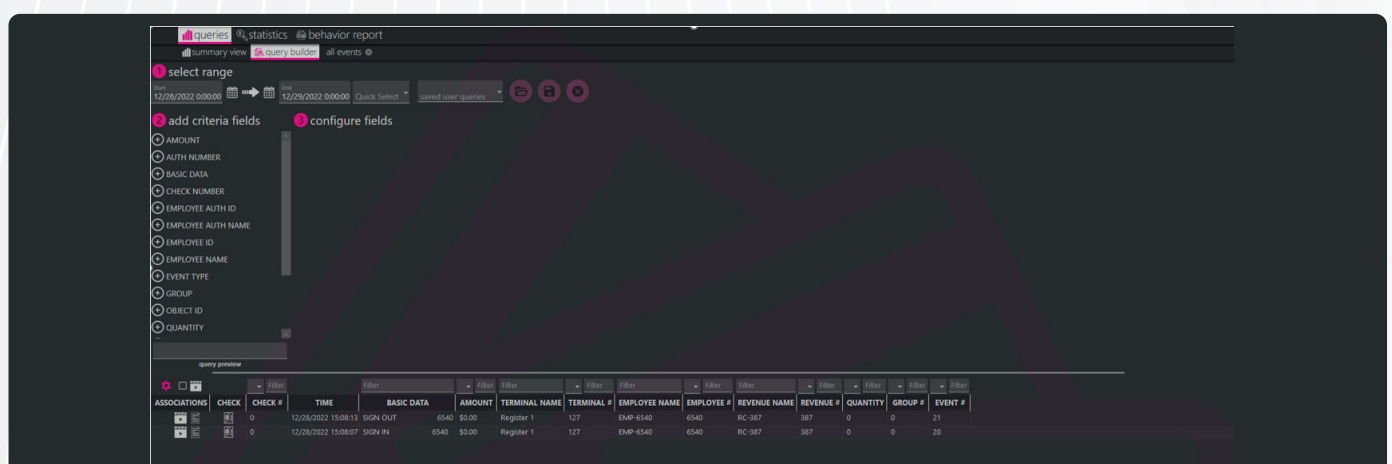
- You can also capture the image by clicking on the  icon and save it to a file or to a case. Export the data from this aggregation by clicking on the .
- Once you click on either a piece of the graph or an employee name, the next screen will look like the screen you were on before entering the aggregate mode. You will notice, however, that all the transactions are now isolated to the employee you selected from the graph. You can now review each event and see what the employee is doing to create more events than their co-workers.

POS Query Builder

- To navigate to the query builder, go to the top navigation bar and select “POS”. Then select “Queries” and then “Query Builder”.



- For the most part, the eConnect team will build custom queries for you to access at any time. However, the “Query Builder” is how you can generate data in a way you choose to customize. “Query Builder” is also a great way to search for specific data criteria, such as a particular employee’s transactions or a specific check number.
- After selecting “Query Builder” you will see this screen:



When looking at the “Query Builder” you will see a number guide to walk you through building a query or completing a search. Follow the numbers to build your query and then click “Query”.

- Start with number 1 by setting your date and time range or clicking on the drop-down and selecting a preset time frame.
- Next is number 2 where you will select what you want to search for. To select a criteria field, click on the “+” next to the criteria you want to be included in the query. Once you have chosen from number 2 it will be displayed under the number 3.
- You will then fill out the field for number 4 based on the criteria selected.
*Note: You can go back to number 2 and add more search criteria, but it must be along the same line of data.

BASIC DATA	EMPLOYEE #	AMOUNT	TERMINAL #	EMPLOYEE NAME	REVENUE NAME	REVENUE #	TERMINAL NAME	CHECK #	QUANTITY	OBJECT #	TABLE #	GROUP #	EVENT #
------------	------------	--------	------------	---------------	--------------	-----------	---------------	---------	----------	----------	---------	---------	---------

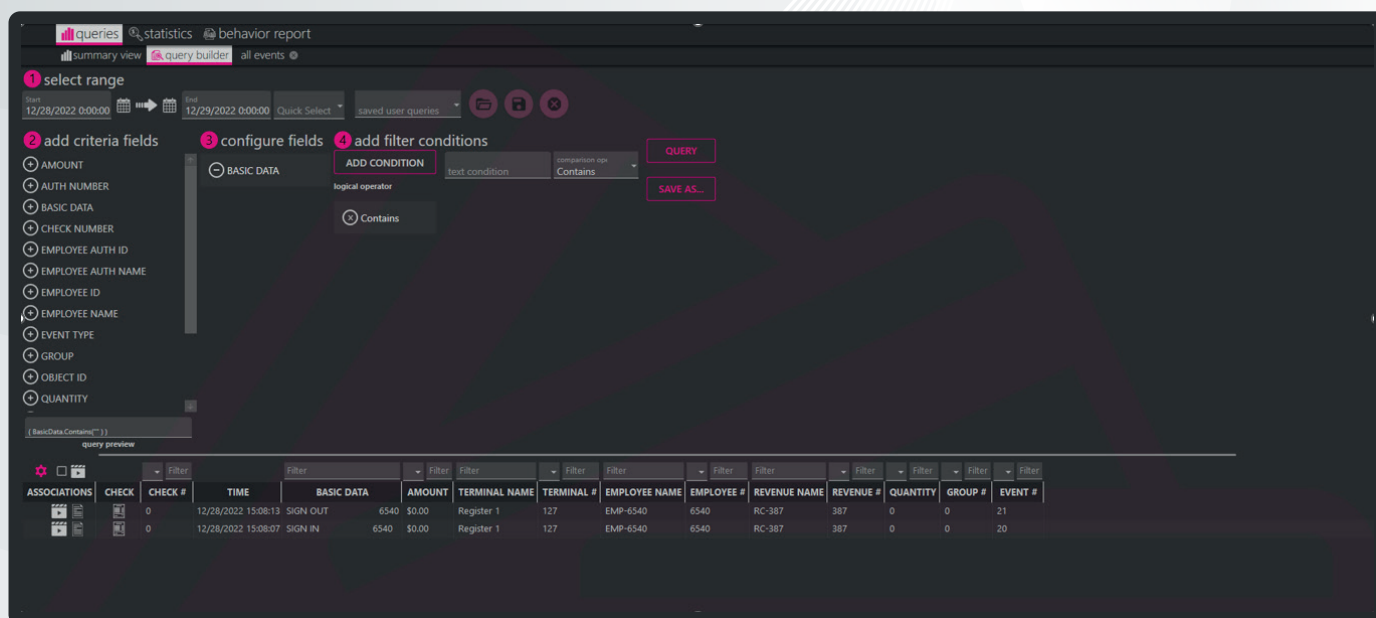
- Within the query builder, there are 3 areas you’ll want to be proficient in *Basic Data*, *Check Number*, and *Event Type*.

Basic Data

- With basic data, you can search any keyword your POS system uses as it appears on a receipt or the terminal within the Basic Data column. *Note: Spelling must match how the data is displayed in your POS system.

Example

- **1.** Select the date/time range by using either the calendars or the drop-down menu, then press the “+” sign next to Basic Data to initiate your query. To the right you will see some new fields expand out. These are the attributes that you will apply to your search.
- **2.** Select the condition from the “Add Criteria Fields” column. This will prompt new options to display under “Configure Fields”.
- **3.** Enter the text or keyword you are searching for. You can either wait a few seconds and results will populate at the bottom half of the screen or you can click “Query” off to the right. Clicking “Query” will show your results on a separate grid view page.



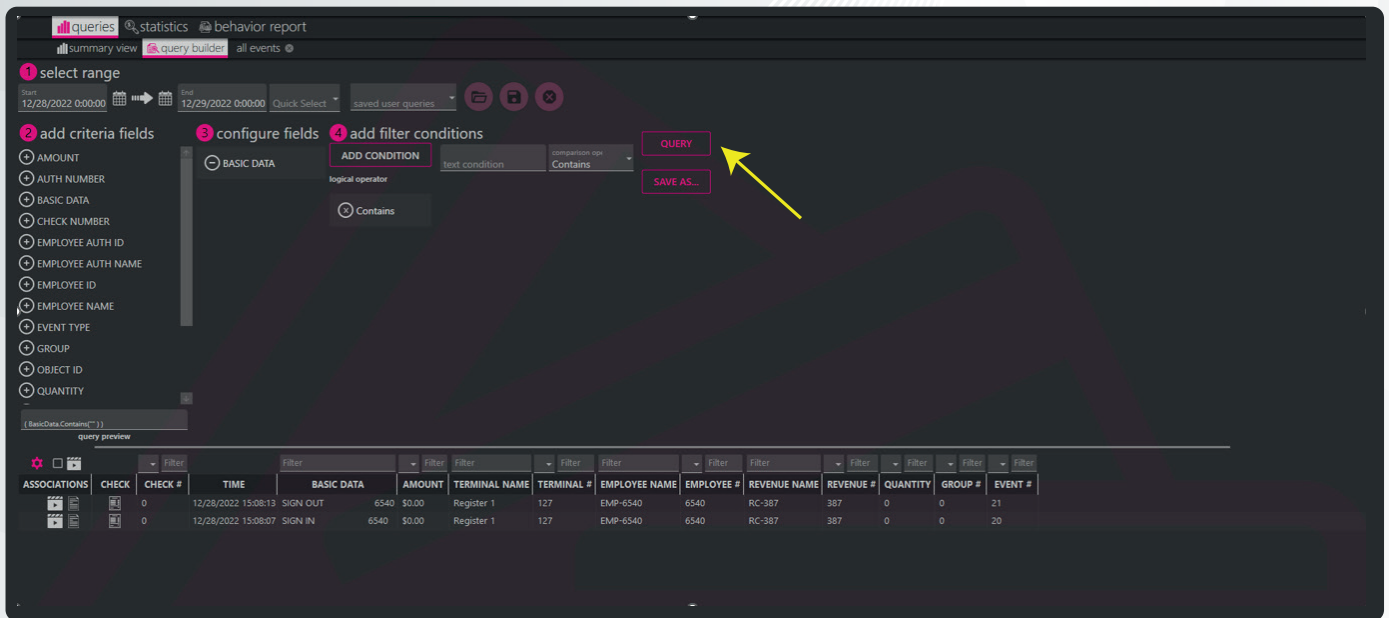
- You may also save the query for future use by clicking the “Save AS” button on the right. If selected, you will be prompted to name the query. The query will then be available in your Summary View POS Queries list.
- *Note – If you enter information for a Basic Data search and you don’t get the results you are looking for, adjust the spelling to match your POS data.
- With training and practice, you can create more advanced queries. If you would like further assistance with advanced queries, please email us at investigations@econnect.tv. Our team is here to help you.

Check Number Query Search

- This is a useful tool when you are looking for a specific check on a specific day. This is especially helpful when researching customer complaints.

Example

- Select the date/time range by using either the calendars or the drop-down menu, then press the “+” sign next to Check Number to initiate your query. **CHECK NUMBER** To the right you will see some new fields expand out. These are the attributes that you will apply to your search.
- Enter the check number you want to review in the blank field and hit the “Query” button or wait to see if the results display below.



- ***Note:** Many POS systems re-use check numbers, so you may need to search for the correct date/time to retrieve the correct check number.

Event Type

- As POS transactions come into eConnect, they are stored in categories and the Event Type identifiers will help you find them.

Example

- **1.** Select the date/time range by using either the calendars or the drop-down menu, then press the "+" sign next to Event Type to initiate your query.
Ⓢ EVENT TYPE To the right you will see some new fields expand out. These are the attributes that you will apply to your search.
- **2.** Select from the dropdown in the highlighted area and find the POS function you would like to review. Click the "Query" button or wait to see if the results display below.

The screenshot shows a query builder interface with the following components:

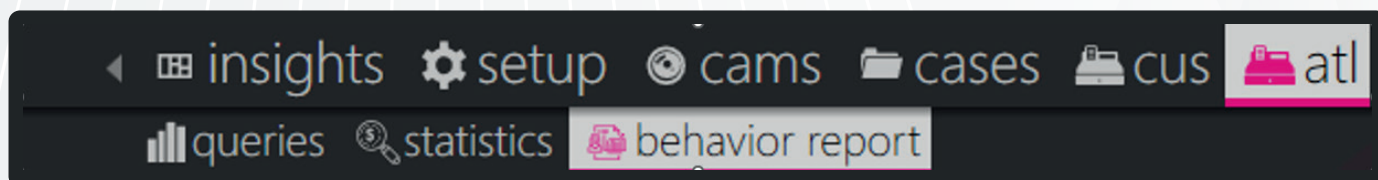
- Step 1: select range** - Includes date pickers for Start (12/28/2022 0:00:00) and End (12/29/2022 0:00:00), a 'Quick Select' dropdown, and a 'saved user queries' dropdown.
- Step 2: add criteria fields** - A list of fields on the left: AMOUNT, AUTH NUMBER, BASIC DATA, CHECK NUMBER, EMPLOYEE AUTH ID, EMPLOYEE AUTH NAME, EMPLOYEE ID, EMPLOYEE NAME, EVENT TYPE, GROUP, OBJECT ID, and QUANTITY.
- Step 3: configure fields** - A field 'EVENT TYPE' is selected with a minus sign icon.
- Step 4: add filter conditions** - An 'ADD CONDITION' button is present. Below it, a logical operator 'Equals 14' is shown. To the right, a 'Comparison Value' of '14' is entered, and a 'comparison opt' of 'Equals' is selected. A 'Lookup Data' dropdown shows '[14] NoSale'.
- Buttons** - 'QUERY' and 'SAVE AS...' buttons are on the right, with a yellow arrow pointing to the 'QUERY' button.

- ***Note:** If you do not receive any results on a query, this event type may not be active for your POS or you can try a different date range.

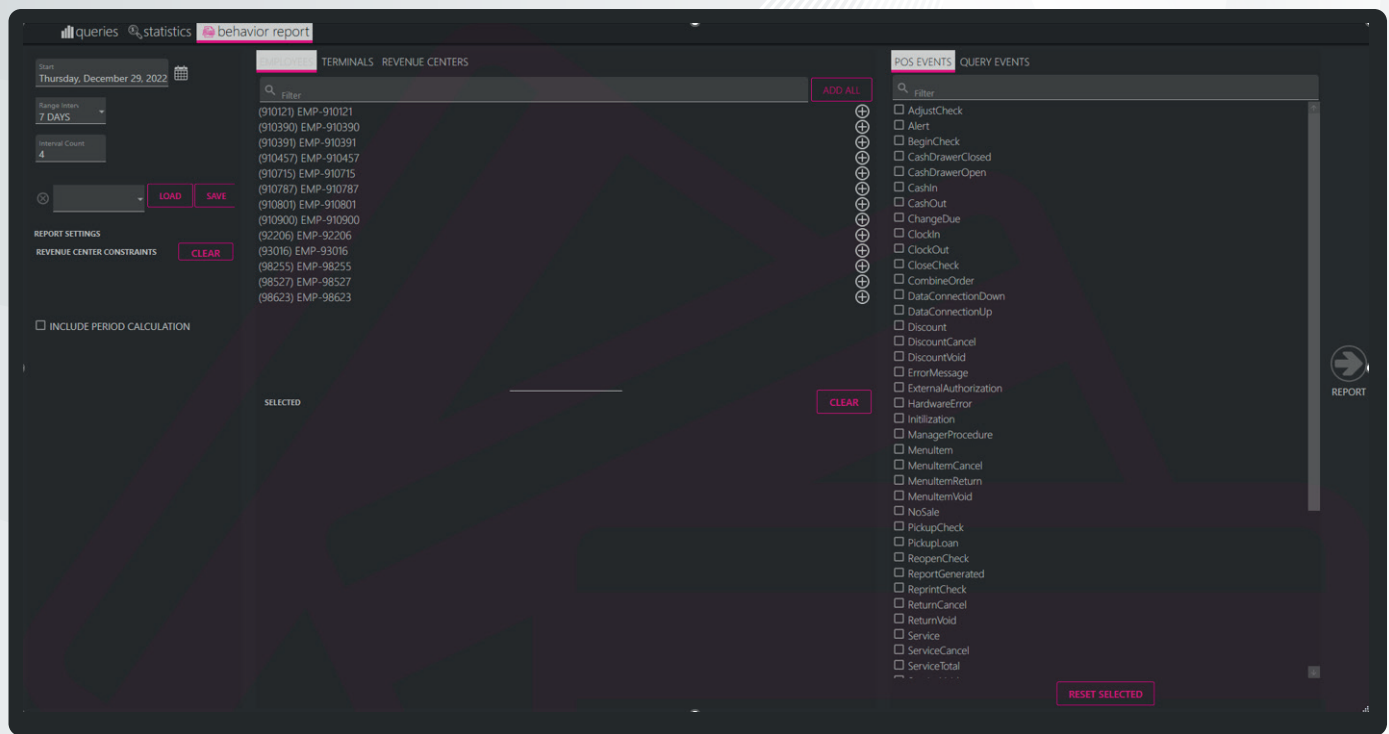
POS Behavior Report

The Behavior Report is another way to compare employees to each other to find unusual occurrences. Behavioral Intelligence is one of the most effective ways to isolate trends by employees who work in similar revenue centers. Using the standard deviation methodology, you can now see which employees are operating outside the norm.

- Navigate to the POS Behavior Report by clicking "POS" on the top navigation bar. Then select "Behavior Report" on the second line.



- Once you click "Behavior Report" you will see this screen:




- It contains three attribute sections: **When Who, and What**

Section #1 Interval Range (When?)


On the far left, you will see the first set of attributes to run this report. These include:

- **The Calendar** – Choose your date to work from.
- **Range Interval** – How many days of data do you want to be grouped?
- **Interval Count** – How many of the Range Interval groups do you want to analyze? (Example: A range interval of 7 days and an interval count of 4 will show a total of 28 days of data.)
- You also have the option to use the dropdown to load a previously saved behavior report or save a behavior report you set up.

Tuesday, December 03, 2019 

RANGE INTERVAL

INTERVAL COUNT



REPORT SETTINGS

REVENUE CENTER CONSTRAINTS

☐ INCLUDE PERIOD CALCULATION


- Now that you have Time selected, move the “Focus” to the center of the page.




Section #2 Behavior Focus (Who?)

In this section, you have three options to choose from. You can choose to analyze Employees, Terminals, or Revenue Centers.

- One of the best ways to analyze behavior is to select Revenue Centers and then add all the employees from that revenue center. When you select employees for a revenue center, the final report will show you transactions for only that location even if the employee has worked at multiple locations.

EMPLOYEES TERMINALS **REVENUE CENTERS**

 Filter

(387) RC-387   

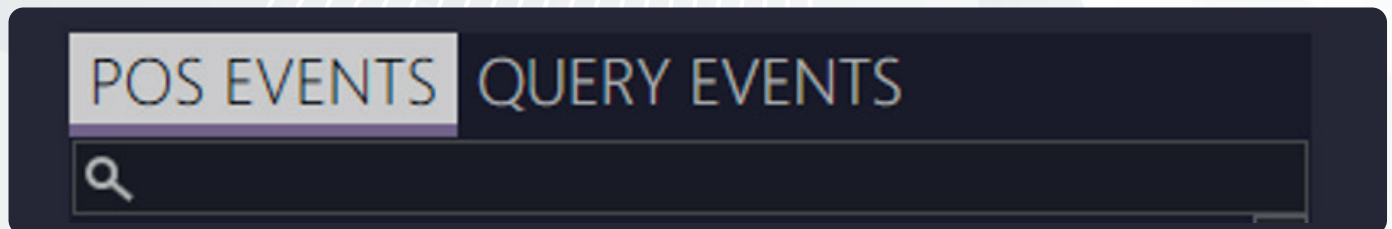
SELECTED

- This will allow you to isolate the individuals in each revenue center.
- You can also use terminals as a tool to isolate as needed.
- Use the “Clear” button in the lower part of the screen to reset the attributes in this section.

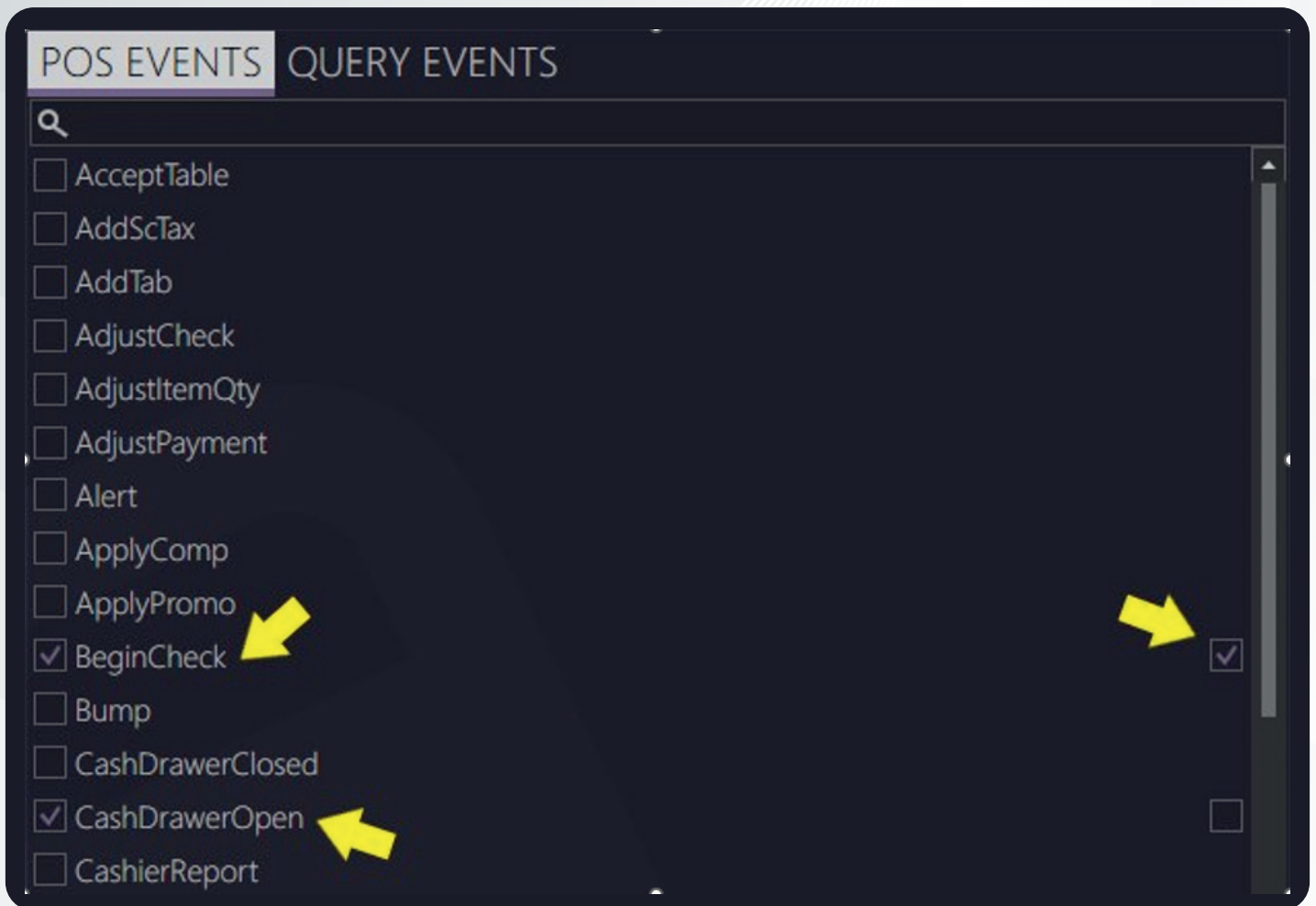
Section #3 Event Type Selection (What?)


In this section you simply select the event types or queries you want to analyze.

- Here you can choose from POS Events or Query Events. You can choose from one or both sections to use for comparison.



- Check the box next to each event you want to analyze.
- If an event or query is not found during your search it will not be displayed on your report.
- It is advisable to choose “Begin Check” for analysis as this gives a good idea of how many total transactions an employee participates in.
- You can also compare any event to another event to show a percentage. For example, once you select “BeginCheck”, to the right another box can be checked. By checking that box it will compare Begin Checks to everything else selected. In this example, “CashDrawerOpen” has also been selected. This will show you the percentage of Begin Checks to Open Cash Drawers. (See Below)
- *Note: In POS Events, you will have some options that are not turned on or the POS that you are using does not support those events.



- This can show additional information relating to employee fraud. The data can fall within the standard deviation, but the percentages can show the data still needs to be reviewed.
- Once you have selected your events/queries, click the arrow above "Report" to  get your results.

POS Behavior Report- Analyzing the Report

Congratulations! You should now see a screen like this:

	1/5/2019 - 11/12/2019		1/12/2019 - 11/19/2019		1/19/2019 - 11/26/2019		1/26/2019 - 12/3/2019		AVERAGE	
NAME	BEGINCHECK	CASHDRAWEROPEN	BEGINCHECK	CASHDRAWEROPEN	BEGINCHECK	CASHDRAWEROPEN	BEGINCHECK	CASHDRAWEROPEN	BEGINCHECK	CASHDRAWEROPEN
(98436)					4	16	602	15	151.5	7.75
(98464)							205	6	51.25	1.5
(98708)	1233	31	1392	23	463	17			772	17.75
(98736)	29	1			137	3		10	41.5	3.5
(98794)			215	3	278	7	65	12	139.5	5.5
(98853)	235								58.75	
(98855)					331	6			82.75	1.5
(98859)							223		55.75	
(98861)			1	1	152	4			38.25	1.25
(98864)					14	6			3.5	1.5
(98870)					977	13			244.25	3.25
(995687)	861	17	980	20	281	6	1013	16	783.75	14.75
AVERAGE	196.5	4.08	215.67	3.92	219.75	6.5	175.67	4.92	201.9	4.85

- Notice the legend on the bottom left. It will tell you how many standard deviations the person has from the average.
 ABOVE AVERAGE
 ONE STD DEV
 TWO STD DEV
 THREE+ STD DEV
- In the sample report above, you can see that two of the employees are highlighted in red. You would most likely focus your attention on these individuals and drill into their transactions.
- The averages on the far right are the total averages for each person. To the left, you will see the four interval counts. Each of those numbers is hyperlinked to the corresponding data.
- Anyone in pink is above the average for the time frame selected.

POS Statistics

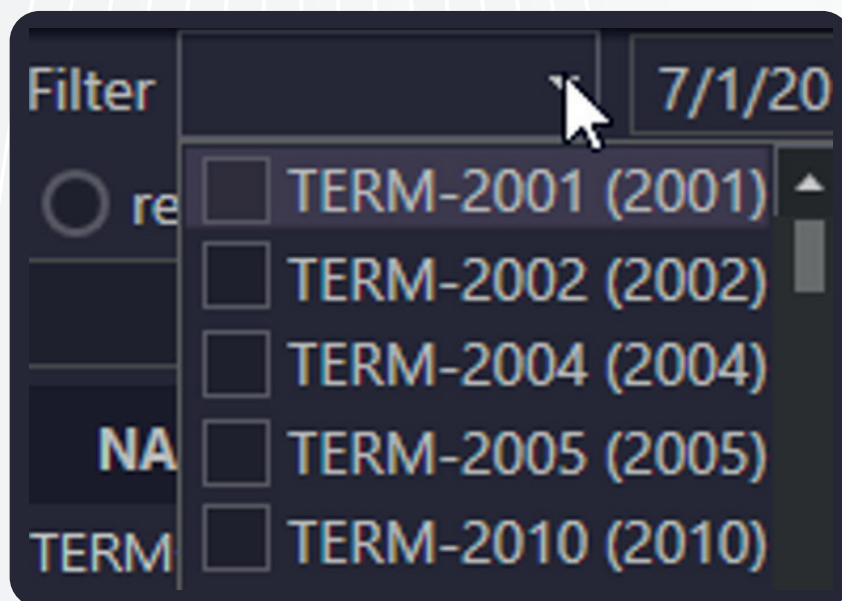
This is a straightforward and easy-to-use report. It gives you more of a grid-style view and allows you to quickly filter information.

- Navigate to the Statistics Report by clicking "POS" on the top navigation bar, then "Statistics" on the second line.

- This report has three major focal points: Revenue Center, Employee, and Terminal.
- Choose your date range at the very top.
- Click on one of the buttons below the date to choose revenue center, employee, or terminal.

☐ revenue center ☐ employee ☒ terminal

- Once the report populates you can realign the columns to your liking by clicking and dragging the dark-colored boxes to the left or right.
- You can also filter each column with the dropdowns.
- You can also select which names you want to show by clicking the Filter drop-down located by the date.



- Each underlined number is hyperlinked to the data associated with that number.

queries **statistics** behavior report

Filter Start 12/15/2022 0:00:00 End 12/29/2022 13:22:56 Quick Select Last 14 Days

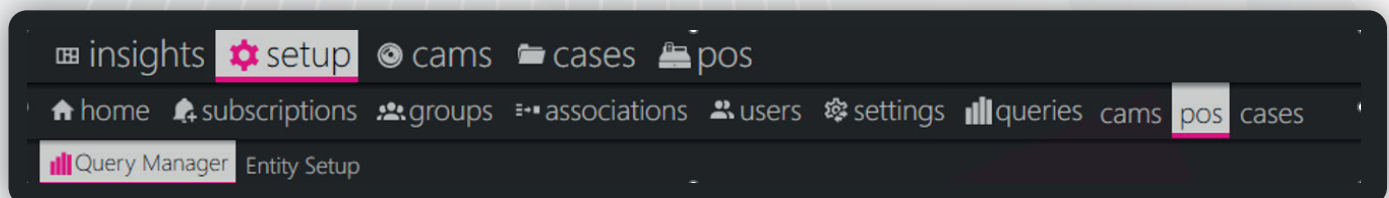
☐ revenue center ☒ employee ☐ terminal

NAME	ID	CHECKS	MI	MI AVG	MI VOIDS	MI VOIDS %	TOTAL \$	AVG \$	DISCOUNTS	DISCOUNT %	DISCOUNT \$	DISCOUNT \$ %	CASH TOTAL	CREDIT CARD TOTAL	OTHERS TOTAL
EMP-910121	910121	851	1831	2.15	123	6	\$5,051.09	\$5.94	151	17.00	(\$88.54)	2	\$0.00	\$0.00	\$6,543.09
EMP-910390	910390	335	1055	3.15	62	5	\$2,939.91	\$8.78	66	19.00	(\$66.11)	2	\$0.00	\$0.00	\$3,494.30
EMP-910391	910391	1055	3572	3.39	153	4	\$10,095.46	\$9.57	213	20.00	(\$242.55)	2	\$0.00	\$0.00	\$12,271.25
EMP-910457	910457	417	1294	3.10	56	4	\$3,741.22	\$8.97	62	14.00	(\$37.32)	1	\$0.00	\$0.00	\$4,571.17
EMP-910715	910715	538	1094	2.03	73	6	\$3,018.72	\$5.61	112	20.00	(\$71.74)	2	\$0.00	\$0.00	\$3,776.99
EMP-910787	910787	1	5	5.00	4	80	\$0.00	\$0.00	0	0.00	\$0.00	0	\$0.00	\$0.00	\$0.00
EMP-910900	910900	3	6	2.00	0	0	\$19.83	\$6.61	2	66.00	(\$1.28)	7	\$0.00	\$0.00	\$22.39
EMP-92206	92206	20	55	2.75	6	10	\$130.53	\$6.53	5	25.00	(\$2.34)	2	\$0.00	\$0.00	\$149.90
EMP-93016	93016	1981	5811	2.93	149	2	\$17,353.13	\$8.76	359	18.00	(\$347.08)	2	\$0.00	\$0.00	\$20,863.93
EMP-98255	98255	552	1303	2.36	65	4	\$3,635.06	\$6.59	96	17.00	(\$67.38)	2	\$0.00	\$0.00	\$4,671.83
EMP-98527	98527	2	6	3.00	6	100	\$0.00	\$0.00	0	0.00	\$0.00	0	\$0.00	\$0.00	\$0.00
EMP-98623	98623	568	1662	2.93	130	7	\$4,613.83	\$8.12	88	15.00	(\$97.52)	2	\$0.00	\$0.00	\$5,899.30

Building Alerts

Alerts are very easy to set up, but keep in mind that you will get a screen pop-up every time that transaction type takes place on the bottom right corner of your screen.

- On the top navigation bar click on "Setup" and then "POS".



- Select the query you want to receive an alert for on the left side. Then check the box that says, "Real Time Alerts" and click "Save Query/Execute". You will now see pop-ups on the lower right-hand corner of your screen.

NAME Advanced Query

DESCRIPTION Void + TX Cancel

Void & Transaction Cancel Event

QUERY

```





CANNED ECONNECT QUERY - THIS QUERY MAY BE REMOVED / CHANGED IN THE FUTURE
IF YOU MODIFY THIS QUERY DIRECTLY, IT COULD BE CHANGED ON A FUTURE UPDATE
IF YOU WOULD LIKE TO MODIFY THIS QUERY, PLEASE COPY ITS CONTENTS AND PASTE
IN A NEW QUERY. YOU CAN DISABLE THIS QUERY WITHOUT UPGRADE RISKS.
=====
from posMain in context.POSDataEventView
let posSub = from posSub1 in context.POSDataEvents where
posSub1.POSTerminalID == posMain.POSTerminalID &&
posSub1.CheckNumber == posMain.CheckNumber &&
posSub1.EventTypeID == 13 &&
posSub1.DataTimeStamp > posMain.DataTimeStamp.AddMinutes(-10) &&
posSub1.DataTimeStamp < posMain.DataTimeStamp.AddMinutes(60) &&
posSub1.DataOwnerID == posMain.DataOwnerID

```

☐ Disabled ☒ Real-time Alerts ☐ Private

Created By "System"

- You will see a bell icon next to the query title once alerts have been enabled.

	Void + NoSale	System
 	Void + TX Cancel	System
	Voids > 3/Check	System

- Please note that not all users will have access to this section.