WatchList

User Manual

WatchList is a members-only database for managing your Neighborhood Watch group. It significantly reduces the effort to create and maintain a **Neighborhood Directory** and a **Patrol Schedule**. You can also send **E-Mail Distributions** to everyone in your group.

- Create and maintain a database of neighbors, then automatically format a Neighborhood Directory to distribute.
- Create and rearrange a Patrol Schedule with just a few clicks, then automatically format a document to distribute.
- Solicit patrol volunteers and distribute documents by sending neighborhood-wide e-mails.
- Send weekly automated reminder e-mails to patrol volunteers.

A web-based database interface is easier than using a spreadsheet or word processor and sending e-mails manually to hundreds of people. The **WatchList** website is:

http://WatchList.ged-gen.com

WatchList was developed by Mike Voisin to manage the Bishop Road Neighborhood Watch group near Huntsville, Alabama. It allows other watch groups to use the same program. All residents and group operations are compartmentalized so members of one watch group cannot see private information about other watch groups. Private information is also stored in encrypted format.

Suggestions for improvements and new features are always welcome. There is no guarantee or warranty of data integrity or availability. **WatchList** is not affiliated with any official neighborhood watch organization or law enforcement.

Administrator: Mike Voisin (mvoisin@gmail.com)

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First Things First

1. Contact the **WatchList** site administrator via e-mail at mvoisin@gmail.com. The administrator will create your Neighborhood Watch group and an initial user account.

2. You will receive a user name and password to access the **WatchList** website, and a *separate* user name and password to log into your watch group. Once you log in, you will see the main menu page.

3. Click *Streets* and add the names of all the streets you will patrol in your neighborhood.

4. Click *Group* and edit your neighborhood name as you want it to appear. Sample introductory text is provided for your Neighborhood Directory, the Patrol Schedule and a patrol reminder e-mail. You may edit the text later.

5. Click *Users* and edit your user account. If you want to use the e-mail distribution feature of **WatchList**, enter your Google e-mail address and Google account password. You may wish to create a separate Google e-mail account just for use with the **WatchList**. If you have something other than a Google e-mail account, the administrator will assist you in setting the appropriate options.

6. Click *Directory*, then click the **Add** button to start adding entries for the residents of your neighborhood.

If you already maintain a spreadsheet of your neighbors' names and contact data, you can use **Import** on the *Directory* page to transfer it into **WatchList**.

You should download and backup your Neighborhood Directory database periodically using the **Export** command.

Directory

This is a database of residents in the neighborhood. It stores names and contact information for each home. It is used to automatically generate a Neighborhood Directory and Patrol Schedule. It is also used to send e-mails asking for patrol volunteers, and if desired, to distribute electronic copies of the Neighborhood Directory and Patrol Schedule.

	Home	Click to go back to the main menu page.
	Schedule	Click to go directly to the scheduling page.
	Add	Click to add a new entry to the directory.
	Export	Click to download a spreadsheet file containing all the entries in the directory. You can use this to keep a copy of your database, or to import your data into another program.
	Import	Click to upload a spreadsheet file containing entries to be added to the directory. This file must be a specific format (see the appendix). Current entries will *not* be overwritten. If your spreadsheet contains information that would duplicate what's already in the directory, duplicate entries will be created.
	<number>	Select the number of directory entries to display per page. If there are more entries, you can page back and forth by clicking the arrow icons.
	<entries>	Select the type of directory entries you want to display, either all entries, or only active entries, or only inactive entries.
	<streets>	Select the streets you want to display. If you don't select all streets, then only directory entries of residents living on a particular street will be displayed. If you don't see the street you want listed, you must add that street back on the main menu page, under *Streets*.
	Create Directory	Click to generate a print-out of the Neighborhood Directory. This uses the information currently in the database to format and generate a Portable Document Format (PDF) file. After it is generated, click the View button to display it. While viewing it, you can choose to save the file to your computer, or to print it on your printer. You can find a directory that you previously generated by going back to the main menu page and clicking *Attachments*.
	Search	Enter a word or phrase and click Search to display just those directory entries that match your search criteria. You can search full or partial names, house numbers (not streets), telephone numbers, e-mail addresses and notes. You can also use your browser's built in Find command. However that only works on the entries displayed, if there are multiple pages. It will also not include any note fields that are "collapsed" (hidden from view).
	Clear	Click to clear the previous search results and display all directory entries again.
	Expand / Contract	Click to expand or contract all note fields for entries that have attached administrative notes.
	<letters>	When directory entries are displayed by the name column, you will see capital letters in the command bar. These are short-cuts to surnames in the directory. For example, click M to display the first surname that starts with M. If you don't see a letter, say W for instance, it means there are no surnames that begin with W.

Viewing Entries

You can display the table of directory entries various ways. Click one of the underlined column headings to sort by that column. Click it again to sort in reverse order. You can sort by active entries, by those participating in the neighborhood watch, by last name (the default), by street name, or by number of patrols scheduled.

Missing information, like no telephone number or no e-mail address, has a light red background. This is a reminder for you to obtain that missing information. Rows highlighted with an all gray background indicate inactive entries. Either they moved away, or they don't want their information included in the directory.

Each directory entry has a set of actions. What you are allowed to do varies depending on your role and what you are currently doing.

	Notes	Click to display your administrative notes about this directory entry. To add, delete or modify your notes, click the Edit icon instead. *Hint:* To expand or contract all note fields from view, click the Expand or Contract icon in the command bar above.
	Edit	Click to edit this directory entry to change name, address, contact information, and so on. Once you update an entry, there is no way to undo the changes you made. You can however see what the information was by looking at the main menu page, under *Logs*.
	Duplicate	Click to add a new directory entry using the contents of this directory entry as its initial fields.
	Delete	Click to delete this directory entry. You will be asked to confirm the deletion. There is no way to undo a deletion once you confirm it. You can however see what the information was by looking at the main menu page, under *Logs*.

Status Boxes

	Active entry		Watch participant
	Inactive entry		Watch non-participant

There are two status boxes for each directory entry, an *active* flag, and a *watch* flag. If the entry is "active," it will appear in the Neighborhood Directory print-out. They will also receive e-mail distributions if they provided an e-mail address. An inactive entry is still visible to you in the database, but won't appear in the directory print-out. This is for residents who specifically want to opt out of the Neighborhood Directory for privacy reasons. Or, if a resident moves away, you can maintain the old information for historical reasons, but it won't appear anywhere else or be used in any way.

The watch flag indicates the resident is a potential neighborhood watch patrol volunteer. A majority of residents will never volunteer, but if this flag is set, they will still receive solicitations asking for volunteers. If a resident specifically opts out of the neighborhood watch, clear this checkbox and they will not receive solicitations. There is an option when you send an e-mail, to include everyone, or just people interested in neighborhood watch.

Patrol Column

The *Patrol* column shows the number of times that resident was scheduled to patrol, both in the past and in the future, if they are currently scheduled to patrol.

Add or Edit a Directory Entry

Name

Spouses living at the same address will usually have different contact information. They may share a home phone number, but have different cell or work phone numbers, and different e-mail addresses. In that case create *two* separate directory entries, one for each spouse. If spouses have the same phone numbers and e-mail address, then create one directory entry for both, if desired. In that case specify both their first names together, like "Fred & Wilma."

The database is *not* designed to record children living at the residence. However, if an adult child or boarder also lives at the residence, you may wish to create a separate entry for them.

If you have contact information for a resident, but you do not know their name, specify "Unknown" as their surname. This enables their e-mail address and they will be included in e-mail distributions. Otherwise you can leave the name fields blank. You may want to indicate a house is unoccupied by optionally specifying "Empty" as the surname.

Sometimes house numbers are not consecutive. A vacant lot, a curve in the road, or a cross street may account for "missing" sequential house numbers. If you want your directory entries to be complete and consecutive, you can indicate there is no

such address. Enter NO HOUSE, or NO SUCH ADDRESS as the surname. This can eliminate confusion when referring to nearby addresses.

Address

Since this is a local neighborhood watch, there is no provision for city, state and zip, just a house number and street. To indicate the street, click on the street name so it is highlighted. You can only choose a street that has been previously defined. If you need to add a new street name to the list or edit an existing street, go back to the main menu page, under *Streets*.

Telephone Numbers

There is room for three different telephone numbers. It is recommended that residents provide alternate phone numbers in case, during an emergency, the neighborhood watch volunteer tries to call them and they don't answer. Provision is made for home, work and cellular numbers, but how people use these varies. For many, their cell number is also their home number. Some will not specify which number is which. In those cases, you can enter their primary number as their home phone, even if it's a cell number. The radio box next to each number allows you to specify which of the three is their primary contact number and that will be listed first in the Neighborhood Directory.

E-Mail Addresses

There is room for a primary and secondary e-mail address. E-Mail addresses are used to solicit volunteers for neighborhood watch patrols, and to distribute the Neighborhood Directory and Patrol Schedule. Ordinarily, e-mails are sent only to a resident's primary address, but you can optionally send an e-mail distribution to both addresses. If a resident doesn't want to receive e-mails at work for instance, simply delete their secondary e-mail address from their entry. The radio box next to each address allows you to specify which of the two is their primary contact address.

Some people don't have computers, or they prefer not to provide their e-mail address. They will appear in the Neighborhood Directory and you can still assign them to the Patrol Schedule, but they will not receive e-mail distributions or reminders. You must contact them by phone or with a paper note or flyer.

Patrol Partner

This is a list of all the other residents in the directory. If the particular person you are adding or editing will go on a watch patrol with another person, select the other person in this list. Find their name in the list and click it to highlight it. When you later schedule that person for a patrol, all related partner names will be assigned to the same time slot.

A husband and wife will usually patrol together and you can specify one spouse as the partner of the other. Both their names will then appear on the Patrol Schedule. For other couples, only one spouse is interested in the neighborhood watch, and therefore they are not assigned a partner. Also two neighbors may wish to team up for patrol. Select one as the patrol partner of the other, and both their names will appear on the Patrol Schedule.

If you select a patrol partner for one person, the other person is automatically updated to show them as their partner too. If you are adding a directory entry, that person's patrol partner may not yet be in the directory. Simply finish adding the current person, then add the second person and choose the first person as their patrol partner.

Currently, this is the only way to specify related patrol partners. If during scheduling, you find that two people want to patrol together and they are not already partners, you must come back to the *Directory* page and edit the entry of one or the other.

Notes

You can enter administrative notes about a person in their directory entry. These are notes that only you as a coordinator or scheduler can see. They will not appear in the Neighborhood Directory print-out or Patrol Schedule. You might record a person's preferences for patrols, why they opted out, or your notes about contacts with them, crime incidents at their residence, when a for-sale sign was posted, and so on.

Delete a Directory Entry

Be careful when deleting directory entries. If you delete a person who is assigned to a Patrol Schedule, they are removed from all schedules, both past and future. Since you are deleting their name and contact information, there will be nothing to show for those schedule slots. Instead, the slots to which they were assigned are changed to "- Open Slot -." Their patrol tally, the number of times they were scheduled to patrol, is also erased.

Schedule

Here you can easily assign and rearrange volunteers in the neighborhood watch Patrol Schedule and then generate a schedule print-out complete with dates, names and contact information automatically filled in.

	Home	Click to go back to the main menu page.
	Directory	Click to go directly to the Neighborhood Directory page.
	<year>	Select the starting year for the scheduling period. This is usually the current year, but if you want to update say, the Winter/Spring schedule, and it is already spring, select the previous year. That's because the Winter/Spring schedule started in the winter of the previous year.
	<period>	Select the scheduling period for which you want to create or maintain a Patrol Schedule. Only dates that are within the period you select will be visible in the scheduling boxes, and only those dates will appear in the schedule when you click Create Schedule.
	Calendar	Click to open a basic calendar for planning purposes.
	Send Reminder	Click to manually send a reminder e-mail to the patrol volunteers scheduled for this week, next week, and the week after.
	Create Schedule	Click to generate a print-out of the Patrol Schedule. This uses the information currently in the database and schedule to format and generate a Portable Document Format (PDF) file. After it is generated, click the **View** button to display it. While viewing it, you can choose to save the file to your computer, or to print it on your printer. You can always find a schedule that you previously generated by going back to the main menu page and clicking *Attachments*.

Scheduling is an iterative process:

1. Create an empty schedule for your desired scheduling period, say Spring/Summer.
2. Distribute an empty schedule via e-mail to residents in your neighborhood and ask for volunteers to fill the slots.
3. As you get responses by e-mail, assign volunteers to their desired slots on the schedule.
4. After a few days, create another copy of the schedule that is partially filled.
5. Distribute this preliminary schedule and ask for volunteers to fill the remaining slots.
6. Repeat this process until all schedule slots are filled.
7. Create a final schedule.
8. Distribute the final schedule.

Patrol volunteers must be residents already defined in the Neighborhood Directory database. If they are not, create an entry for them back on the *Directory* page.

To assign volunteers to Patrol Schedule slots:

1. Select the starting year and scheduling period for patrols in the command bar along the top. This defines which dates will appear in the *Day Patrol* and *Evening Patrol* lists.
2. Click on a date to be assigned in either the *Day Patrol* **or** the *Evening Patrol* list. It will appear highlighted.
3. Click on a name in the *Volunteers* list to assign that person to the date highlighted in Step 2.
4. Repeat Steps 2 and 3.

Note: An asterisk (*) in the *Volunteers* list indicates that person has one or more patrol partners. Clicking one partner automatically assigns all partners to the slot. To initially define patrol partners, you must go back to the *Directory* page and edit the entry for one of the partners. Select that person's partner(s) from the *Patrol Partner* list. Then when you come back to the *Schedule* page, you will see the asterisk.

If you make a mistake, or you later want to assign a different volunteer to a particular slot:

1. Click on the date in either the *Day Patrol* or the *Evening Patrol* list. It will appear highlighted.
2. Click the **Clear Slot** button.
3. Click on a name in the *Volunteers* list to assign the new person to the date highlighted in Step 1.

To generate a Patrol Schedule document you can distribute to residents:

1. Select the starting year and scheduling period for patrols in the command bar along the top. This defines which dates will appear in the schedule print-out.
2. Click the **Create Schedule** button.
3. Click the **View** button (when it appears) to display your schedule.
4. While viewing the schedule, use your browser's *Save As* command to save a copy to your computer, or your browser's *Print* command to print it on your printer.
5. You can make changes to your schedule and click the **Create Schedule** button again at any time to update your print-out. If you do that during the same day, it will automatically overwrite the file. If you do that on another day, a new document is created. Files are named according to the date.
6. You can view, download or print a schedule you previously generated by going back to the main menu page and selecting *Attachments*.

Preliminary Schedule

If any slots are empty when you create a schedule, the document is marked **P R E L I M I N A R Y**. To create a final schedule, ensure all slots are assigned with the name of a volunteer. To create a final schedule with unassigned open slots, assign "- Open Slot -" to all empty slots. That special "volunteer" appears at the top of the *Volunteers* list.

Reminder E-Mail

You can manually send a reminder about the next upcoming patrol week. It reminds this week's volunteers to pass on the magnetic car signs to next week's volunteers. It also alerts volunteers scheduled the week after next that their shift is coming up.

Normally the reminder e-mail is automatically sent each week. If you do not have it enabled, or you need to re-send it, you can click **Send Reminder** to send it manually. You have the opportunity to review the message before it is sent. The reminder is sent only for the *next* upcoming scheduling period. Thus if your weekly patrols run from Sunday through Saturday, the reminder will be sent immediately, and it will mention the upcoming Sunday shift change. You cannot send the reminder for another future scheduling period, or one in the past.

The recipients of the reminder are always the patrol volunteers scheduled for this week, next week and the week after. You should ensure those slots are filled on the schedule before you send the reminder. And, especially if you have automatic reminders enabled, you should always ensure your schedule has those slots assigned.

To enable, disable or change the automatic reminder time, or to alter the message itself, see the main menu page, under *Group* options (if you are a coordinator).

E-Mail

Use this page to send an e-mail to residents in the Neighborhood Directory. Compose your message, then click the **Prepare Message** button. You will be asked to verify your message and the list of recipients. When you are ready to send it, click the **Send Message!** button.

<u>Recipients</u>

1. Choose recipients by street. Your e-mail will be sent to *everyone* residing on the streets you select. Click the **Select All Streets** button if you want to send your message to all streets. Use this for example to distribute a copy of the Neighborhood Directory, or to make an announcement to the entire neighborhood.
2. Choose recipients by street, but include only those who participate in the Neighborhood Watch. Use this to solicit neighborhood watch volunteers and to distribute the Patrol Schedule.
3. Choose only Neighborhood Watch volunteers currently assigned to a patrol during a selected period. Use this to communicate just with your patrol volunteers, such as to alert them to a situation, or a schedule change.
4. Choose individual recipients from a list of all possible recipients.

You can send your message to "Undisclosed Recipients." That means everyone will receive the message, but they will not see the other recipients' e-mail addresses. This is done for privacy. It also prevents people from doing a "reply-all," or using the e-mail distribution list for other purposes. On the other hand if you send your message to a few people, you may want them to see and respond to each other. The "Undisclosed Recipients" feature uses Blind Carbon Copy (BCC).

If you are sending by street, you can choose to send your message to both primary *and* secondary e-mail addresses for residents who have both. This is not recommended because it increases the number of e-mails generated. Ordinarily, you use a secondary e-mail address only when you don't get a response from someone's primary address.

<u>Subject and Message</u>

Choose a subject line for your e-mail message. Then enter the body of your message. You can include basic formatting, like bold, italic and underline. First highlight the text you want to format and then click one of the format buttons on the left. This inserts some formatting mark-up into your message. Don't worry, you will see the final form of your message after you click **Prepare Message**.

<u>Attachments</u>

You can attach one or more files to your message. Usually this will be the Neighborhood Directory or the Patrol Schedule. The list of available files is from your Attachments folder. That's where your Neighborhood Directory is created when you click the **Create Directory** button, and where your Patrol Schedule is created when you click the **Create Schedule** button. You can attach your own files too, such as pictures of a suspicious car in your neighborhood. But first, you must upload them to your Attachments folder. Go to the main menu page, under *Attachments*.

<u>Review your Message</u>

Before you can send your message, you must click the **Prepare Message** button. This generates the list of recipients, which gives you an opportunity to see exactly who will get your message. It also shows exactly how your message will appear in HTML format, which is a popular format most people can see. It also includes a text-only portion for people who cannot see HTML messages. People will see one or the other, but not both, and it is all done automatically by their e-mail viewer.

The message sender is always the person currently logged into the **WatchList**. To use a different sender, log out and log in as another user. As the sender, you will always receive a copy of the e-mail you send, as if you were a recipient.

Additionally, you can define up to three other people to receive a copy of all messages sent. They are defined on the main menu page, under *Group*. They can be a co-coordinator, a coordinator of another watch group, or anyone you want to monitor the messages sent through the **WatchList**. They are automatically included on all messages sent and are listed as Blind Carbon Copy (BCC) recipients. That means no one who receives the message will know who the BCC recipients are.

When you are satisfied with the recipients and content of your message, click the **Send Message!** Button. If instead you want to make changes, click **Cancel**. Make your changes and click **Prepare Message** again.

Constraints on the Number of Recipients

There will be a noticeable delay when you click **Send Message!** Be patient and the **WatchList** will respond within several seconds. Your message is probably addressed to hundreds of recipients. The list of recipients may be divided into groups of less than 75 recipients. A separate, but identical e-mail will be sent to each of these groups of recipients. This is done because your e-mail service provider has restrictions on the number of recipients a message can have. Otherwise they will consider you a spammer and temporarily disable your e-mail account. For this reason, **you should not initiate more than one e-mail distribution in any 24-hour period**. Otherwise you risk not being able to use your e-mail account, at least temporarily.

The multiple identical e-mails is transparent and if you use the "Undisclosed Recipients" feature, your recipients will not know. However, as sender, you will receive an e-mail for each separate group of recipients. For example, you may receive three copies of your e-mail because the list of recipients was broken up into three identical messages.

More detailed information about e-mail distributions is described in the **Users** section (see below).

Attachments

Attachments are the documents you can attach to your e-mail distributions. Every time you create a Neighborhood Directory or a Patrol Schedule, a copy of the document is placed in the attachments area. You can then select attachments on the E-Mail page when you compose an e-mail distribution.

You can view, download or delete attachments. First click the attachment in the list so it is highlighted, then click **View** or **Delete**. You can download an attachment by clicking **View**, then use your browser's *Save As* command to save it to your computer.

Neighborhood Directories are named with the year, month and day they were generated. In other words the directory is up to date as of that date. If you later make changes to the directory database, you can create a new directory.

> `2018-02-09-Directory.pdf` is for February 9, 2018.

Patrol Schedules are named with the year, schedule period, month and day, and whether preliminary or not.

> `2018-SprSum-Prelim-0203.pdf` is for Preliminary Spring/Summer 2018, generated Feb 3.
> `2018-SprSum-0223.pdf` is for the final Spring/Summer 2018 schedule, generated Feb 23.

You can also upload your own files so you can attach them to your e-mail distributions. Click the **Browse…** button, select a file on your computer, then click the **Upload** button. Caution: If you upload a file that has the same name as a file that already exists in your attachments area, the existing file will be overwritten.

Streets

Here you define the street names in your neighborhood. These will appear in a list of streets when you add or edit a directory entry. Since it is a neighborhood watch, there will be a limited number of streets that get patrolled. You can add new streets, or edit or delete existing streets.

When adding a street, choose a complete name, like *Main Street*, or *South Charity Lane*, rather than just *Main* or *Charity*. Also choose an abbreviation for each street. This is used in the index to the Neighborhood Directory. Since the index is compact, don't specify an abbreviation longer than three or four capital letters. For example, enter *MS* for *Main Street*, or *SCL* for *South Charity Lane*. The abbreviation should be unique to distinguish between all streets in your neighborhood.

You should not delete a street if there are entries in the directory that specify that street as their address. Otherwise, those directory entries will no longer have a street defined.

Users

Here you can manage user accounts for a few people who are allowed to log into the **WatchList** website. Each user has a defined role, which restricts what they can see and the actions they can perform.

Coordinator

The Neighborhood Watch coordinator is responsible for managing all aspects of the neighborhood watch. This includes creating and maintaining the Neighborhood Directory, soliciting for patrol volunteers, and creating and maintaining the Patrol Schedule. There may be more than one coordinator per group, and in that case they all delegate or share responsibilities as they desire.

Scheduler

A scheduler is an "assistant" coordinator. They can schedule volunteers, update the Neighborhood Directory and send e-mail distributions. However, they cannot modify group options and they cannot change user accounts, except their own, and for volunteers.

Volunteer

A volunteer is a resident of the neighborhood who can view the Patrol Schedule and Neighborhood Directory, and edit only their own directory entry.

The **WatchList** is *not* designed to allow all residents of the neighborhood to log in and view the directory and Patrol Schedule online. That would involve creating a volunteer user account for every resident. Instead, the volunteer role is meant for a few trusted residents, or to grant temporary access to someone to modify their own contact information in the directory.

In order for a volunteer to have access to his own directory entry, you must specify an associated directory entry when you create that user account. If you do not specify a directory entry for the particular user account, that user will not be able to edit their own entry.

Disclosure of Accounts

Although not advised, you can create a user account (coordinator, scheduler or volunteer) for someone who does not live in your neighborhood. This might be a coordinator of an other Neighborhood Watch group, who you want to have access to your group. You would simply give them the user name and password of a user account you create for them.

However this may violate the trust residents have in you to keep their contact information private. You **should not** disclose the access password to the **WatchList** website, or the password to any user account to someone not directly involved in managing your Neighborhood Watch group. Contact information for all residents should be kept private. If you disclose the website access password to too many people, someone may inadvertently share it publicly. That may give hackers an opportunity to attack the website.

Access permissions for each user account role are summarized as follows.

Role	Watch Group	User Accounts	Patrol Schedule	Neighborhood Directory
Coordinator	View, Edit own group	View, Edit Self; Add Coordinator; View, Add, Edit, Delete Scheduler or Volunteer	View, Add, Clear	View Everyone; Add, Edit, Delete Anyone
Scheduler	None, not visible	View, Edit Self; View, Add, Edit Volunteer	View, Add, Clear	View Everyone; Add, Edit, Delete Anyone
Volunteer	None, not visible	None, not visible	View	View Everyone; Edit, Delete Self

Note: The administrator of the **WatchList** creates and maintains the website itself. The administrator has programmatic access to every Neighborhood Watch group. Although contact information is stored in encrypted format, the administrator still has the keys to decrypt it. This is a necessary part of programming. For example the **WatchList** website must be able to decrypt a stored telephone number so that it can be displayed in the Neighborhood Directory.

E-Mail Distributions

Coordinators and schedulers can send e-mail distributions to the neighborhood. E-Mails will be sent by "proxy" to each user's personal e-mail service provider. This means, that when you send an e-mail distribution, the **WatchList** logs into your e-mail service provider and sends the message on your behalf. The e-mail is sent from your personal e-mail account and the recipients will see that the message came from you.

This is done because of restrictions that prevent websites like **WatchList** from sending bulk e-mail messages. A legitimate e-mail account is required to prevent spam, or junk e-mails. Service providers also have restrictions on the number of recipients an e-mail can have. Therefore **WatchList** may divide up your recipient list and send multiple identical e-mails.

If you initiate a large e-mail distribution more than once in a 24-hour period, your e-mail service provider may temporarily suspend your e-mail account. This means you will not be able to send or receive e-mails on your personal account. Therefore you should avoid multiple e-mail distributions per day. Plan what you want to say and *proofread* it so you don't have to send a correction the same day. Or, log in as another user, who has a different e-mail service provider account when you must send additional distributions the same day.

If you have a large number of residents in your neighborhood, over 400, even sending multiple identical e-mails to subsets of recipients might be rejected by your e-mail service provider. In that case, you must send your message to one or two streets in your neighborhood, then wait until the next day to send another message to one or two other streets.

Perhaps you are uncomfortable with storing your personal e-mail password at **WatchList**. Perhaps you don't want to risk having your personal e-mail account suspended. In that case you can create a separate e-mail account at your e-mail service provider. You can then have an e-mail account dedicated to your duties with Neighborhood Watch. That means however, you must check two accounts, your personal e-mail account and your Neighborhood Watch account, when you check for new e-mails. For example, you would receive responses to a request for patrol volunteers at your Neighborhood Watch e-mail account so you must monitor that account for new e-mails.

Note: The first time you send an e-mail distribution using **WatchList**, your e-mail service provider may identify an attempt to log into your account from an unrecognized computer. You must approve access to your account so **WatchList** can use it.

Group

Your Neighborhood Watch group was created by the **WatchList** administrator, who also created a user account for a particular resident to act as Neighborhood Watch coordinator. As coordinator, you can create additional user accounts as needed, even co-coordinator accounts. People in one Neighborhood Watch group cannot see or access other groups.

You can edit the name of your Neighborhood Watch group and set the start day for weekly watch patrols, for example *Sunday* if your patrols will run from Sunday to Saturday. Currently, only weekly shifts are supported.

The Neighborhood Directory distinguishes between home, work and cellular telephone numbers, and between home and work e-mail addresses. If a resident provides more than one number or e-mail address, an indication of which is which is displayed in the Neighborhood Directory print-out. This is indicated by (H) for home, (W) for work, and (C) for cell. You can omit these labels if desired. Simply clear the associated checkbox. They are still maintained in the database, but they will not appear in the print-out. A preferred number or e-mail address always appears first if more than one is given.

You also provide the exact wording of the title page of your Neighborhood Directory, the title page of your Patrol Schedule, and the e-mail that is automatically sent each week to remind your patrol volunteers. Generally, you can include standard, but simple, Hypertext Mark-up Language (HTML) to format your text. How you do that is beyond the scope of these instructions, but you can find good tutorials on the Internet. These are some commonly used mark-up symbols:

`<p> </p>`	The enclosed text is a separate paragraph.
` `	Inserts a line break, or carriage-return and line-feed.
`<ul> </ul>`	Encloses an unnumbered bullet list. Each bullet is a line enclosed with and .
`<li> </li>`	Inserts a bullet list item, within a and block.
`<a href="">` `</a>`	Inserts a link to a website or an e-mail address: click here sample@sample.com
`<b> </b>`	Makes the enclosed text bold format: bold results in **bold**.
`<i> </i>`	Makes the enclosed text italic format: <i>italic</i> results in *italic*.
`<u> </u>`	Makes the enclosed text underlined: <u>underline</u> results in underline.
`<box> </box>`	This is a special symbol understood only by **WatchList**. Use it to insert a box on the introductory page of your Patrol Schedule. The box appears with a lined border around it. Use it to highlight special instructions for patrol volunteers, like reminding them to call the Sheriff's non-emergency number when they see something suspicious.

Special Code Words

You can use certain special code words in your introductory text. They are substituted with actual text. Code words are words enclosed between two percent signs (%).

|	
`%LISTING%` `%INDEX%`	In the Neighborhood Directory, you can insert %LISTING% and/or %INDEX%. These are replaced with "page *n*" where *n* is the page number on which the directory *listing* starts, and the page on which the directory *index* starts. Use these to refer your reader to a specific page in the Neighborhood Directory. The replacement text is also a link, meaning the reader can click on it to move directly to that page in their PDF viewer. This is helpful when someone refers directly to the index page.
`%DATE%`	In the reminder e-mail body, you can insert %DATE%. It is replaced with the day and date when the next patrol period starts, say "Sunday March 11, 2018" for example. This reminds your patrol volunteers when the next patrol week starts.

Neighborhood Map

You can optionally include a map of your neighborhood in the Neighborhood Directory and in the Patrol Schedule. It can help residents locate specific houses in the neighborhood and it helps patrol volunteers determine house numbers if they see something suspicious.

A map is most helpful if it has house numbers for every house, but it may take some effort with a graphics editing program to add them. Consider using your local tax assessor's website. For example see the Madison County, Alabama Tax Assessor, at http://madisoncountyal.gov/departments/tax-assessor, under "Tax Maps." There you can zoom into your neighborhood and get an image of all the streets and houses. Take a screen capture, then edit the image in a graphics editing program.

To include maps, edit your *Group* options and specify two images on your computer to upload, under *Neighborhood Maps*. The image files must be in JPEG format, which usually ends with a ".jpg" extension. Each image should be resized to fit an 8.5 x 11-inch page, after subtracting ½ inch for each of four margins. A resolution of 150 dots per inch (dpi) works well.

The first image should be cropped and rotated for landscape mode. Resize it so the width is 10 inches or less and the height is in proportion, 7.5 inches or less. The second image should be cropped and rotated for portrait mode. Its width should be 7.5 inches or less and its height, in proportion, 10 inches or less. When resizing, keep the width and height proportional so you do not stretch the image in one direction or the other.

The landscape image is used in the Neighborhood Directory, while the portrait is used in the Patrol Schedule. For example if your map is wider than it is tall, you should rotate it 90 degrees so the full image can fit on a portrait mode page.
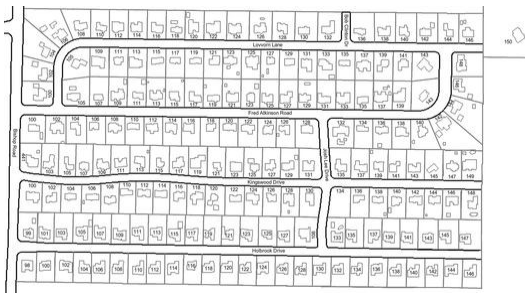
Landscape mode for the Neighborhood Directory
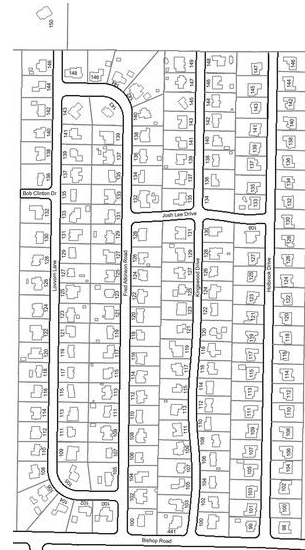
Portrait mode for the Patrol Schedule

E-Mail Distributions

You can define up to three other people to receive a copy of all e-mail distributions you send using **WatchList**. This can be a co-coordinator, a coordinator of another watch group, or anyone else who should monitor your messages. They are listed as Blind Carbon Copy (BCC) recipients. That means no one who receives a message will see these recipients.

You can change the styling of your e-mails using Cascading Style Sheet (CSS) notation. Instructions for doing so are beyond the scope of this document, but you can find tutorials on the Internet. The administrator can assist you with minor changes.

Logs

The **WatchList** keeps a log of activities. For instance if you edit an entry in the Neighborhood Directory, the contents of the entry is recorded before you change it, and again after you change it. This tracks who changed what and when it was changed. It is also possible to go back and see deleted or changed information in case of a mistake.

You can view log entries by selecting the date range during which they occurred. Choose a *from* and *to* date, then click **View**. Each line in the log gives the date and time, the user name, the action, and the fields affected. The action is **A** for *Add*, **E** for *Edit* or **D** for *Delete*, and **L** for log in, **I** for import or **U** for upload. This can be followed by a question mark, which indicates a request to perform the action, or an exclamation point, which indicates the action was performed. For example E? means the edit form was displayed with the current field values. E! means the entry was edited and the new field values are given. If you don't see E! after E? it means the edit operation was canceled and no changes were made.

The log also records the e-mails you send, along with the recipients' e-mail addresses.

Appendix

Neighborhood Directory Import Facility

If you previously managed your Neighborhood Watch group using a spreadsheet program, you can import your data into the **WatchList** without having to add names one at a time using the **Add** button on the *Directory* page. Your spreadsheet must be a file in standard Comma Separated Value (CSV) format. If you are using a spreadsheet program, you can export your data as a CSV file. The first line of the file must be the column headings, *exactly* as in the following table. Columns can be in any order. Extra columns are ignored.

Column Heading	Explanation
`Active`	1=Active (default); 0=Inactive. Whether or not this person should appear in the Neighborhood Directory.
`Watch`	1=Active (default); 0=Inactive. Whether or not this person will participate in the Neighborhood Watch.
`Surname`	The person's last name, or surname. It is set to "Unknown" if not supplied.
`Given`	The person's first name, or given name.
`House`	The house number portion of the person's address.
`Street`	The street name portion of the person's address. **Important:** Streets *must* be spelled <u>exactly</u> like streets already defined for your group. See the main menu page, under *Streets*. Otherwise, this particular entry is not imported. If any entries are rejected, you should **Cancel** the import, correct the error and try again. For example if the spreadsheet you import specifies "Main" or "Main St." and the street you defined for your group is "Main Street," the street names do not match and it is rejected. Or, perhaps the import entries have a street name you did not yet add to your group. Add the street or streets first, then try the import again.
`"Phone Home"`	The person's home telephone number.
`"Phone Work"`	The person's workplace telephone number.
`"Phone Cell"`	The person's cellular telephone number.
`"Phone Prefer"`	A flag that indicates which telephone number is the person's preferred contact number. Enter either "Home," "Work," or "Cell." The default is "Home," or which ever number is supplied if only one is supplied.
`"EMail Home"`	The person's home e-mail address.
`"EMail Work"`	The person's workplace e-mail address.
`"EMail Prefer"`	A flag that indicates which e-mail address is the preferred contact address. Enter "Home" or "Work." The default is "Home," or which ever address is supplied if only one is supplied.
`Notes`	Administrative notes about this person. This can be free-format text, but it must conform to the Comma Separated Value (CSV) file format. You can use the special codes \r and \n to represent carriage-return and line-feed, but if you do, you must use them throughout the note.

<u>Review Your Entries</u>

You will have the opportunity to confirm the import. You should *carefully* review the table of entries. Look for entries in red. If the street name does not exactly match a street you already defined for your watch group, that particular entry is not imported. Check that telephone numbers are formatted properly and they are in the correct column, either Home, Work or Cell. Also check for missing information that may not have been properly mapped to a field in the Directory. Contact the administrator if you feel the import facility should be modified to support peculiarities in your spreadsheet data.

Existing Entries

The import facility only inserts *new* entries. It does not modify *existing* entries in your database. If you import entries that would duplicate entries, then duplicate entries *are* created. You would then have to delete the duplicate entries manually. Therefore you should not re-import the same file more than once. If necessary, create another CSV file containing just those entries that were not imported, if you want to correct and import entries that were rejected. Contact the administrator if you feel it necessary to delete a large number of existing entries before or after you import them. Deleting an entry affects the Patrol Schedule if that person was previously assigned to a patrol slot.

Alternative Columns

Depending on how your data are organized, it may be easier to use alternate columns in your CSV file. The *Address* column can be used in place of the *House* and *Street* columns. The *Primary* and *Secondary* phone and e-mail columns are allowed if you do not differentiate between *Home*, *Work* or *Cell* contacts. Use them if you have only primary and secondary contacts. If you use them, the *Phone Home*, *Phone Work*, or *Phone Cell* columns are ignored.

Column Heading	Explanation
`Address`	If you already use a single column with the house number and street name combined, you may use it in place of the separate House and Street columns above. During import, the Address column is parsed into the separate fields. You can optionally include the House and Street columns. If you do, the Address column is used only when either of those fields is blank. In other words the House and Street columns take precedence and missing information is taken from the Address column. **Important:** The same requirement for exact street names applies to the Address column.
`"Phone Primary"`	The person's primary telephone number. You may optionally indicate whether this number is a home, work or cell number using notation like *(H)*, *Wk*, *Cell*, and so on, *after* the number.
`"Phone Secondary"`	The person's secondary telephone number. You may optionally indicate whether this number is a home, work or cell number using notation like *(H)*, *Wk*, *Cell*, and so on, *after* the number.
`"EMail Primary"`	The person's primary e-mail address. This is placed in the *EMail Home* field.
`"EMail Secondary"`	The person's secondary e-mail address. This is placed in the *EMail Work* field.

Telephone Numbers

You can convert telephone numbers to a uniform format. When data are entered over time, or by different people, the format can vary. For consistency in the Neighborhood Directory, you can choose one format, like 256-555-1212 or (256) 555-1212, and all telephone numbers are changed to that format as they are imported. Your CSV file is not modified.

The import facility attempts to parse telephone numbers intelligently. If an entry has a cell number, but no home number, the preferred number is set to *Cell*. If you use two columns for telephone numbers, use *Phone Primary* and *Phone Secondary*. You can indicate which number is which by including additional text *after* the number, like *(H)* or *(Wk)* or *(Cell)* or *Hm*, and so on. The presence of any H indicates *Home*, the presence of any W, *Work*, and of any C, *Cell*.

For example you have a primary telephone that can be home, work or cell, and a secondary telephone that can be home, work or cell. Then, one entry could have primary 256-555-1212 (H) and secondary 256-555-1212 (W) and another entry could have primary 256-555-1212 (C) and secondary 256-555-1212 (H). The primary telephone number is considered the *preferred* number, which is *Home* in the first entry and *Cell* in the second.

You can also have only one column of telephone numbers. If you use (H), (W), or (C), then the single number is placed in the home, work or cell field in the directory and the preferred phone flag is set accordingly. If you do not specify (H), (W) or (C), then the number is assigned to the Home field and no indication that it is home, work or cell is made.

Regardless of how you use the telephone columns, you must have only one telephone number in any given column.

Reminder E-Mail Table

A reminder e-mail is sent to patrol volunteers to notify them of the start of an upcoming patrol week. It can instruct this week's volunteers to contact next week's volunteers and arrange to hand off the magnetic car signs. It also reminds volunteers scheduled the week after next that their patrol is coming up soon.

The reminder has a table that lists the affected volunteers and their contact information to make it easier for them to contact one another. You can change the style of this table by modifying the *Styling* field for the reminder e-mail on your *Group* page. You can modify the Cascading Style Sheet (CSS) format, but precisely how you do that is beyond the scope of these instructions. There are tutorials available on the Internet. The administrator can help you with minor changes.

Bascially, the table uses a few predefined CSS classes to format the table visually. Simply edit your group settings on the main menu page, under *Group* and modify these classes to change how the table appears in your e-mail.

When you are done, you can test the format of the reminder e-mail. Click the icon under *Actions* on the *Group* page and you will receive the reminder e-mail, addressed only to you. Check your e-mail account as you would normally do.

```
<p><table class="tbl" cellspacing="0">
<tr>
<td class="cel ctr"> </td>
<td class="cel ctr">Day Patrol</td>
<td class="cel ctr">Week Of</td>
<td class="cel ctr">Evening Patrol</td>
</tr>
<tr>
<td class="cel"><p>This Week</p></td>
<td class="cel"><p>NAME<br />
  ADDRESS<br />
  PHONE<br />
  <a href="mailto:EMAIL">EMAIL</a></p></td>
<td class="cel ctr"><p>Feb 4 - 10</p></td>
<td class="cel"><p>NAME<br />
  ADDRESS<br />
  PHONE<br />
  <a href="mailto:EMAIL">EMAIL</a></p></td>
</tr><tr><td class="cel"><p>Next Week</p></td>
<td class="cel"><p>NAME<br />
  ADDRESS<br />
  PHONE<br />
  <a href="mailto:EMAIL">EMAIL</a></p></td>
<td class="cel ctr"><p>Feb 11 - 17</p></td>
<td class="cel"><p>NAME<br />
  ADDRESS<br />
  PHONE<br />
  <a href="mailto:EMAIL">EMAIL</a></p></td>
</tr>
<tr><td class="cel" colspan="4" style="text-align:center; font-weight:bold">The following is advance
notice for planning purposes:</td></tr>
<tr><td class="cel"><p>Coming up<br>the week<br>after next</p></td>
<td class="cel"><p>NAME<br />
  ADDRESS<br />
  PHONE<br />
  <a href="mailto:EMAIL">EMAIL</a><br />
  <a href="mailto:EMAIL">EMAIL</a></p></td>
<td class="cel ctr"><p>DATERANGE</p></td>
<td class="cel"><p>NAME<br />
  ADDRESS<br />
  PHONE<br />
  <a href="mailto:EMAIL">EMAIL</a><br />
  <a href="mailto:EMAIL">EMAIL</a></p></td>
</tr>
</table>
```