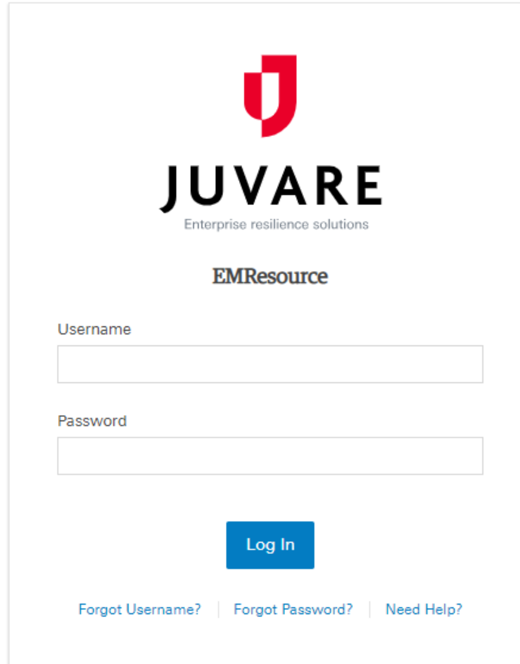
EMResource® Training

Web

To log in to EMResource through the Internet



1. Through your internet browser, go to: https://emresource.juvare.com
   The Log In page opens.
2. Enter the temporary **Username** and **Password** provided by your instructor, and click **Log In**.
   - Username:
   - Password:

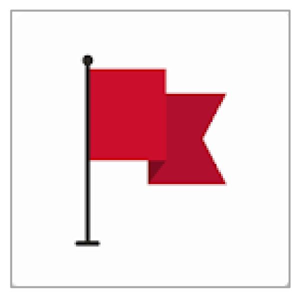
   Note: *After this training, the Username and Password will be reset for this account.*

Mobile

To download the EMResource app for your iOS or Android device

iOS

1. On your phone, open the **App Store**.
2. Search for **EMResource** and in the results, locate **EMResource**.
3. Tap **GET**.



Android

1. On your phone, open the **Play Store**.
2. Search for **EMResource** and in the results, locate **EMResource**.
3. Tap the **EMResource** frame.
4. Tap **Install**.

EMResource / EMTrack / eICS

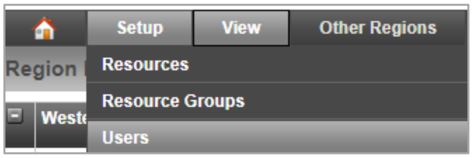
Users that have access to EMResource, EMTrack and eICS are able to navigate back and forth between the applications using the application switcher located on the upper left.

- In EMResource, click the app switcher and select eICS/EMTrack.
- In eICS/EMTrack, click the app switcher and select EMResource.

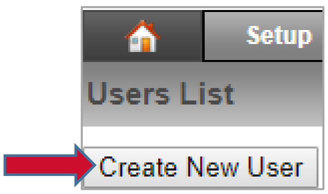
Managing Users

Create a new user

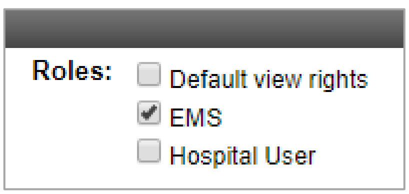
1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.



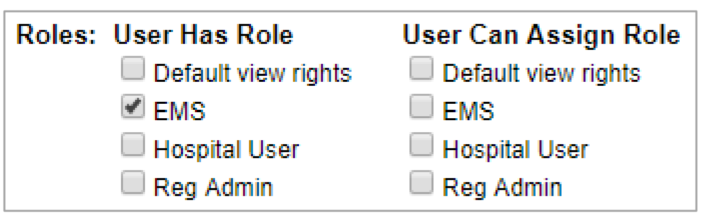
2. Click **Create New User**. The **Create New User** page opens.



3. In the **User Profile** section, enter the appropriate information.
4. In the **User Type & Roles** section, select the role or roles for the user.



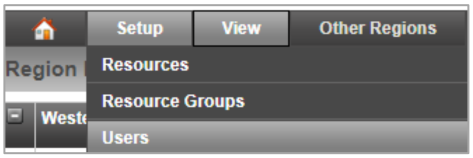
5. In the **User Type & Roles** section, if the user will manage users for a resource, in the **User Can Assign Role** column, select the role or roles that this user can manage.



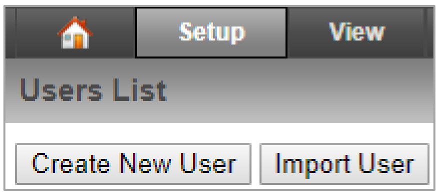
6. In the **Views** section, select the views that should be visible to the user and if appropriate, change the **Default View**.
7. In the **Resource Rights** section, as appropriate, select or clear the check boxes to allow the user access to resources.
8. In the **Resource Rights** section. if the user will manage users for a resource, select the check box for **Administer Users** for the resource that the user will manage users for.
9. If appropriate, expand the **Advanced Options** section to add an **IP Range for login** or to select additional check boxes to grant the individual user specific rights.
10. Click **Save.**

Import a user

1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.

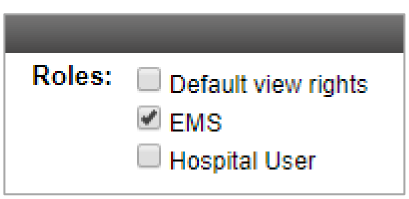


2. Click **Import User**. The **Import User** page will open.



3. Enter the **Username** from EMTrack or eICS that you want to import.
4. Click **Import**. The **Import User Confirmation** page opens.
5. Verify the information on the page is for the correct user.

6. Click **Import**. The Edit User page opens.
7. In the **User Profile** section, enter the appropriate information.
8. In the **User Type & Roles** section, select the role or roles for the user.

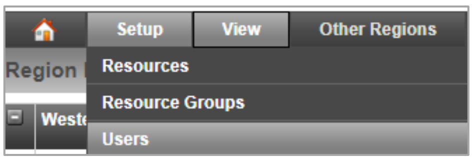


9. In the **User Type & Roles** section, if the user will manage users for a resource, in the **User Can Assign Role** column, select the role or roles that this user can manage.
10. In the **Views** section, select the views that should be visible to the user and if appropriate, change the **Default View**.
11. In the **Resource Rights** section, as appropriate, select or clear the check boxes to allow the user access to resources.
12. In the **Resource Rights** section. if the user will manage users for a resource, select the check box for **Administer Users** for the resource that the user will manage users for.

13. In the **User Preferences** section, update the user's **Notification Preferences** if appropriate.
14. If appropriate, expand the **Advanced Options** section to add an **IP Range for login** or to select additional check boxes to grant the individual user specific rights.
15. Click **Save.**

Edit a user

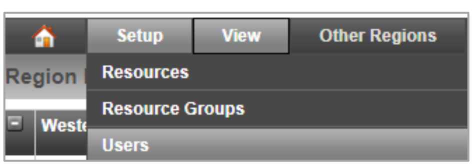
1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.



2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click **Edit**. The **Edit User** page opens.
4. Add/Update/Remove the user's profile information, role(s), access to views, and access to resources.
5. In the **User Preferences** section, update the user's **Notification Preferences** if appropriate.
6. If appropriate, expand the **Advanced Options** section to add/update/remove an **IP Range for login** or to add or remove additional check boxes to grant the individual user specific rights.
7. Click **Save.**

Reset a User's Password

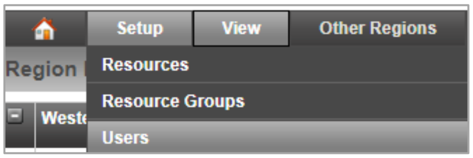
1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.



2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click the **Password** link. The **Change Password** window opens.
4. In **New Password**, enter the temporary password, and then confirm it by entering it again in **Verify Password**.
5. Click **Save.**
6. Click **close.**

De-activate a user

1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.

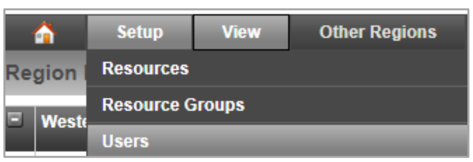


2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click **Edit**. The **Edit User** page opens.
4. In the **User Profile** section, select the **User Status** check box.
5. Click **Save.**

Managing Shared Accounts

Configure a Shared Account

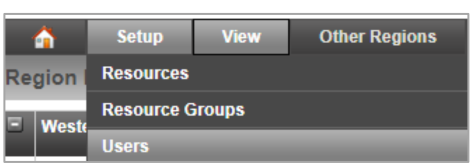
1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.



2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click **Edit**. The **Edit User** page opens.
4. In the **User Profile Section**, select the **Shared Account** check box.
5. Click **Save**.

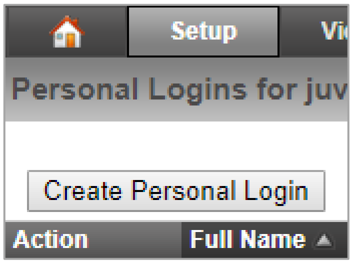
Configure a Personal Login

1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.



2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click **Personal Logins**. The **Personal Logins** page opens.

4. Click **Create Personal Login**.



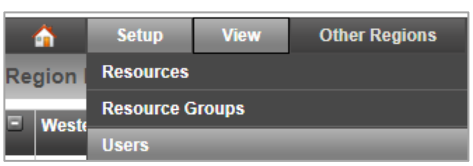
5. Enter the user's email address in the **Login Email** box.
6. Click **Next**.
7. For **Full Name**, enter the user's first and last names.
8. Click **Submit**. An email is sent to the user inviting them to complete the personal login setup.

Deactivate a Personal Login

1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.
2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click **Personal Logins**. The **Personal Logins** page opens.
4. Locate the personal login user in the list.
5. Click **Deactivate** in the first column.

Configure a Shared Account to Prompt User to Create a Personal Login

1. Point to **Setup** and in the menu, click **Users**. The **Users List** page opens.

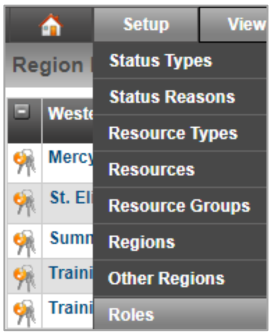


2. As necessary, use the filters and/or search to locate the user you want to edit.
3. On the user's row, click **Edit**. The **Edit User** page opens.
4. In the **User Profile Section**, select the **Personal Logins** check box.
5. Click **Save**.
6. Log out of EMResource
7. Log in as the user you edited. Notice that you are prompted to create a personal login.
8. Log out of EMResource and log in as your training user.

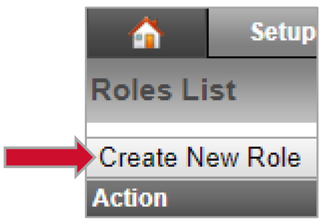
Managing Roles

Create a Role

1. To create a role, from any page, open the Setup menu and click Roles. The Roles List page opens.



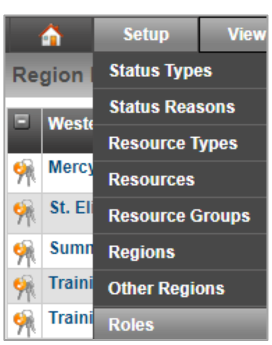
2. Click Create New Role. The Create Role page opens.



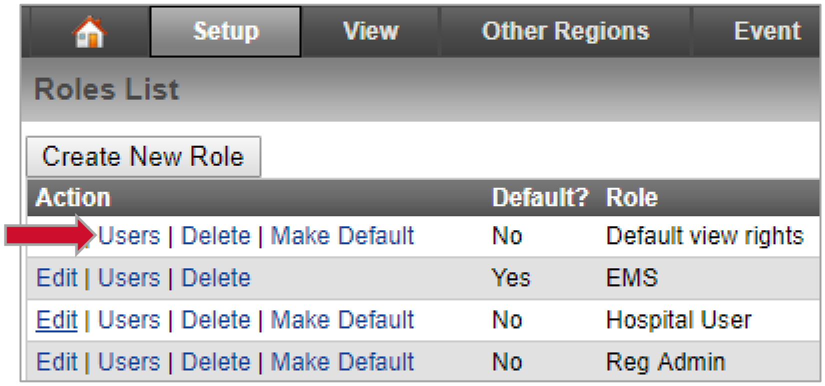
3. In **Name**, enter the role's name.
4. In the **Select the Rights for this Role** section, select the rights to assign to this role.
5. In the **Select the Status Types this Role may view or update** section, select the appropriate check boxes for the status types this role can view and/or update. NOTE: Those status types that have the view right checked and greyed out have the **Status Type Visibility** set to *Allow regions with mutual data sharing agreements to view this status type* or *Only user affiliated with specific resources may view or update this status type* selected.
6. Click **Save**.

Manage a role's users

1. To manage a role's users, from any page, open the **Setup** menu and click **Roles**. The **Roles List** page opens.



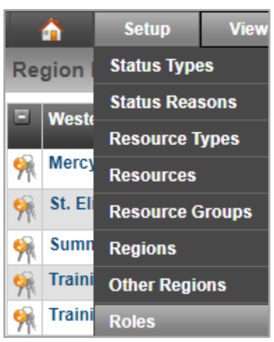
2. Locate the role and click its **Users** link. The **Assign Users to role** page opens.



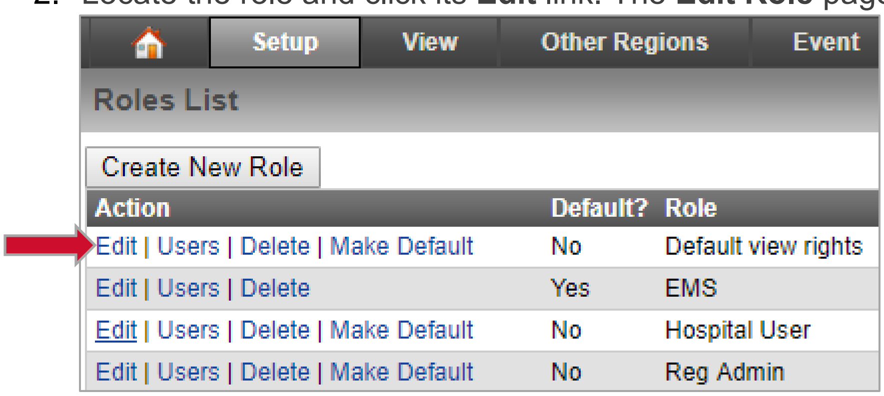
3. Select and/or clear check boxes to assign users to or remove them from this role.
4. Click **Save.**

Edit a Role

1. To edit a role, from any page, open the **Setup** menu and click **Roles**. The **Roles List** page opens.



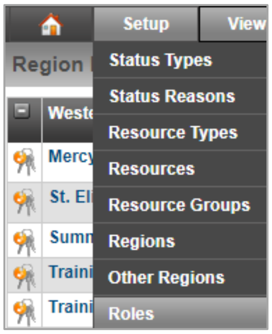
2. Locate the role and click its **Edit** link. The **Edit Role** page opens.



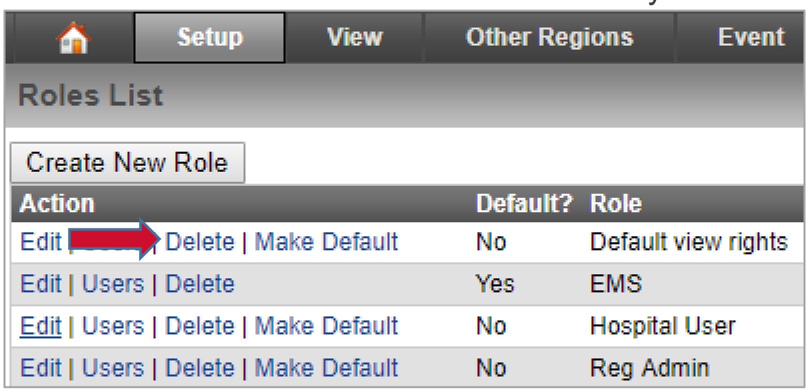
3. In Name, change the role's name, if appropriate.
4. Add or remove the rights to assign to this role in the **Select the Rights for this Role** section.
5. In the **Select the Status Types this Role may view or update** section, add or move the appropriate check boxes.
6. Click **Save**.

Delete a Role

1. To delete a role, from any page, open the **Setup** menu and click **Roles**. The **Roles List** page opens.



2. Locate the role and click its **Delete** link. The system asks you to confirm the deletion.

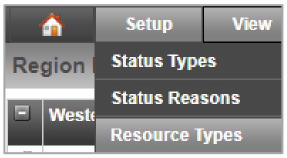


3. Click **OK**.

Managing Resource Types

Create a Resource Type

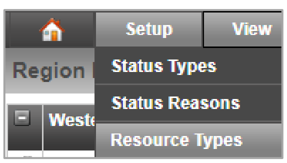
1. To create a resource type, from any page, open the **Setup** menu and click **Resource Types**. The **Resource Type List** opens.



2. Click **Create New Resource Type**. The **Create New Resource Type** page opens.
3. Enter the information in the appropriate fields including **Name**.
4. Select the status types that will be reported by the resource type.
5. Click **Save**.

Edit a Resource Type

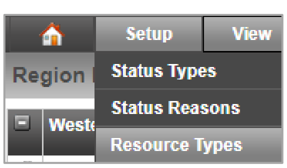
1. To edit a resource type, from any page, open the **Setup** menu and click **Resource Types**. The **Resource Type List** opens.



2. Click **Edit** in the first column. The **Edit Resource Type** page opens.
3. Add/Update/Remove the information in the appropriate fields.
4. Add/Remove the status types that will be reported by the resource type.
5. Click **Save**.

Deactivate a Resource Type

1. To deactivate a resource type, from any page, open the **Setup** menu and click **Resource Types**. The **Resource Type List** opens.

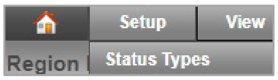


2. Click **Edit** in the first column. The **Edit Resource Type** page opens.
3. Clear the **Active** check box. A confirmation window opens.
4. Click **OK**.
5. Click **Save**.

Managing Status Types

Create a Status Type

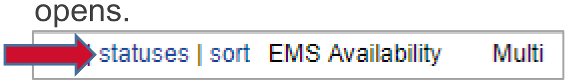
1. To create a status type, from any page, open the **Setup** menu and click **Status Types**. The **Status Type List** opens.



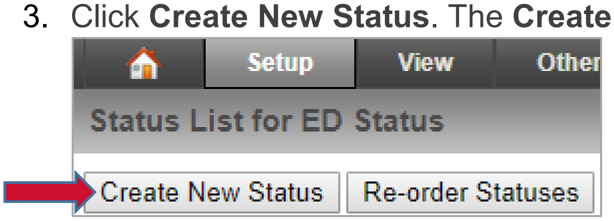
2. Click **Create New Status Type**. The **Status Type List** opens.
3. Select the type (**Select Type)**.
4. Click **Next**. The **Create Status Type** page opens.
5. Specify the settings for this status type.
6. Select the roles that have view rights to this status type (**Roles with view rights**).
7. Select the roles that have update rights for this status type (**Roles with update rights**).
8. Select one or more **Resource Types**.
9. Click **Save**. The **Status Type List** re-opens showing your new status type, or if you are creating a new **Multi** status, the **Status List** page opens so that you can create the associated statuses.

Create a Status

1. To create a status, you will automatically be taken to the **Status List** page immediately after creating a **Multi** status type. Otherwise, from any page, open the **Setup** menu and click **Status Types**. The **Status Type List** opens.
2. Locate the status type and click **statuses** in the first column. The **Status List** page opens.



3. Click **Create New Status**. The **Create New Status** page opens.



4. Complete the appropriate fields.
5. Click **Save.**
6. When you have completed creating all statuses, click **Re-order Statuses**.
7. Reorder the statuses in the order you would like them displayed.
8. Click **Done Re-ordering**.
9. Click **Return to Status Type List** in the top right. The **Status Type List** opens.

Create Status Reasons

1. To create a status reason, from any page, open the **Setup** menu and click **Status Reasons**. The **Status Reasons List** opens.
2. Click **Create Status Reason**. The **Create Status Reason** page opens.
3. In Name, enter the name of the reason.
4. In Definition, enter the definition.
5. In Abbreviation, enter an abbreviation.
6. Leave selected or clear the **Options** check box to include or exclude the status reason from the status comment.
7. Click **Save**.

Edit a Status Type

1. To edit a status type, from any page, open the **Setup** menu and click **Status Types**. The **Status Type List** opens.
2. Locate the status type and click the **Edit** link in the first column. The **Edit Status Type** page opens.
3. Update the settings for the status type.
4. Select or clear the roles that have view and update rights to this status type (**Roles with view rights & Roles with update rights**).
5. Select or clear **Resource Types** check boxes.
6. Click **Save**. The **Status Type List** re-opens.

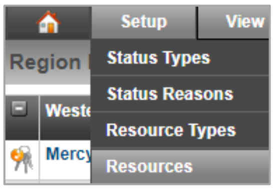
Re-activate/De-activate a Status Type

1. To change the active status of a status type at any time, from any page, open the **Setup** menu and click **Status Types**. The **Status Type List** opens.
2. Locate the status type and click the **Edit** link in the first column. The **Edit Status Type** page opens.
3. Clear or select the **Active** check box to set if the status type is active.
4. Click **Save**. The **Status Type List** re-opens.

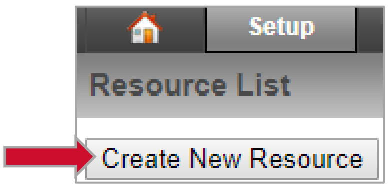
Managing Resources

Create a Resource

1. To create a resource, from any page, open the Setup menu and click Resources. The Resource List opens.



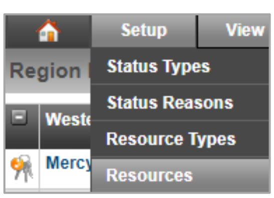
2. Click Create New Resource. The Create New Resource page opens.



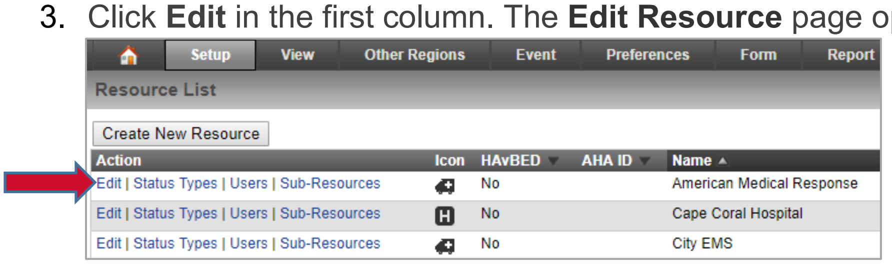
3. Enter the appropriate information including **Name**, **Abbreviation**, and **Resource Type**.
4. Click **Save**. If you are authorized to configure user access, the **Assign Users** page opens.
5. On the **Assign Users** page, select or clear the appropriate check boxes to configure user access to the resource.
6. Click **Save**.

Edit a Resource

1. To edit a resource, from any page, open the **Setup** menu and click **Resources**. The **Resource List** opens.



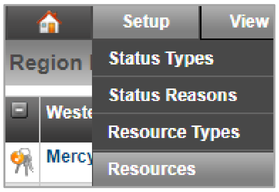
2. Find the resource in the list.
3. Click **Edit** in the first column. The **Edit Resource** page opens.



4. Add/Remove information in the appropriate fields.
5. Click **Save**.

Update User Access to a Resource

1. To edit user access to a resource, from any page, open the **Setup** menu and click **Resource**. The **Resource List** opens.

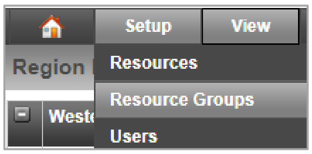


2. Find the resource in the list.
3. Click **Users** in the first column. The **Assign Users** page opens.
4. On the **Assign Users** page, select or clear the appropriate check boxes to configure user access to the resource.
5. Click **Save**

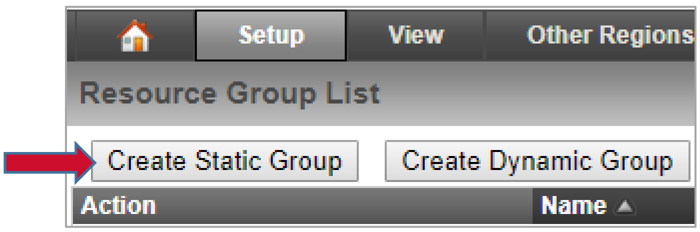
Managing Resource Groups

Create a Static Resource Group

1. To create a static resource group, from any page, open the Setup menu and click Resource Groups. The Resource Group List page opens.



2. Click Create Static Group. The Create Resource Group page opens with the General tab active.

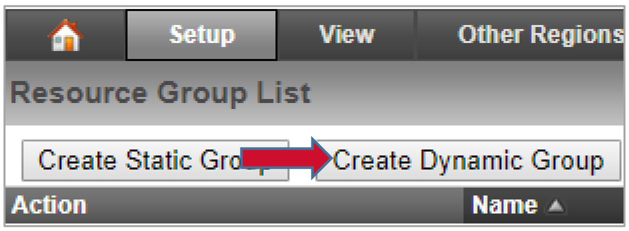


3. Enter the **Name**.
4. Select if the resource group will be **Private** or **Shared**.
5. Click **Next** or click the **Regions** tab. The **Regions** tab opens.
6. Select the check box for one or more regions whose resources you want to include in the group.
7. Click **Next** or click the **Resources** tab. The **Resources** tab opens.
8. Select the check box for one or more resources that you want to include in the group. As appropriate, use the available filters to limit the results in the list of resources.
9. At the bottom of the page, click **Save**. The new resource group appears in the list.

Create a Dynamic Resource Group

1. To create a dynamic resource group, from any page, open the **Setup** menu and click **Resource Groups**. The **Resource Group List** page opens.

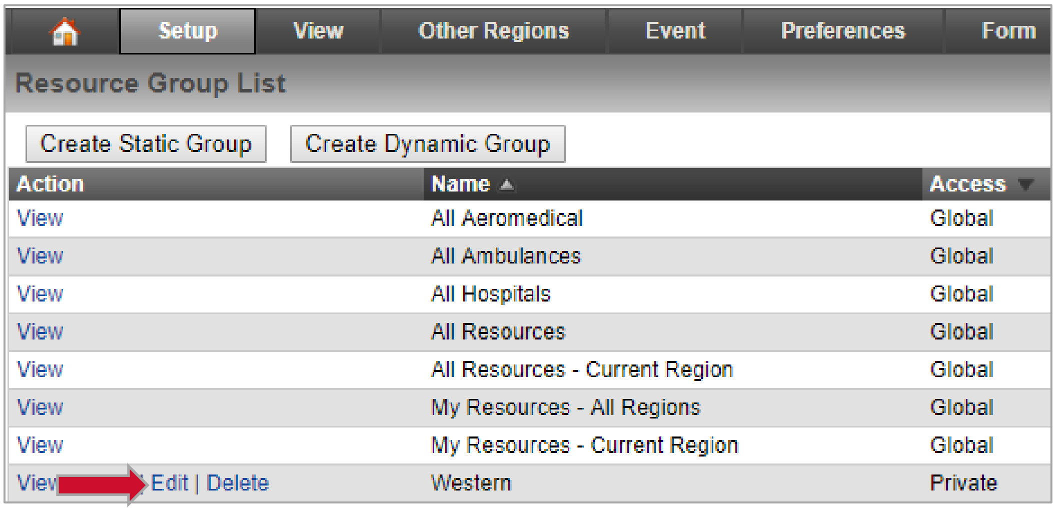
2. Click Create Dynamic Group. The Create Dynamic Resource Group page opens with the General tab active.



3. Enter the **Name.**
4. Select if the resource group will be **Private** or **Shared**.
5. Click **Next** or click the **Regions** tab. The **Regions** tab opens.
6. Select one of the options to select resources based upon a static set of regions or based upon the region that you are logged into.
   NOTE: If you select the static set of regions you must select the regions that you want included.
7. Click Next or click the Standard Resource Type tab. The Standard Resource Type tab opens.
8. As appropriate, select the check box for one or more standard resource types.
   NOTE: If you prefer to define the group by resource types skip this step and go to the next tab.
9. Click **Next** or click the **Resource Types** tab. The **Resource Types** tab opens.
10. As appropriate, select the check box for one or more resource types.
11. Click **Next** or click the **States** tab. The **States** tab opens.
12. As appropriate, select the check box for one or more states to limit resources accordingly.
13. Click **Next** or click the **Counties** tab. The **Counties** tab opens.
14. As appropriate, select the check box for one or more counties to limit resources accordingly.
15. Click **Next** or click the **Preview** tab. The **Preview** tab opens. All resources that meet the criteria you specified for the resource group are presented for review.
16. Click **Save**.

Edit a Resource Group

1. To edit a resource group, from any page, open the **Setup** menu and click **Resource Groups**. The **Resource Group List** page opens.
2. Locate the resource group in the list and click **Edit** in the first column. The **Edit Resource Group** page opens.

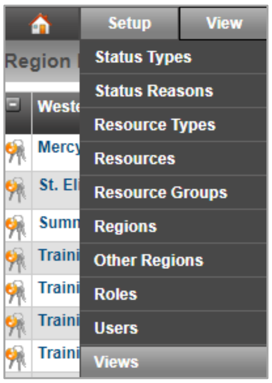


3. As appropriate, add or change the selections on the tabs.
4. Click **Save.**

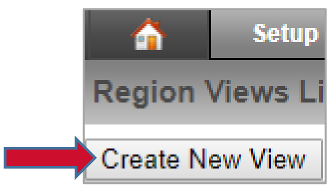
Managing Views

Create a Regional View

1. To create a regional view, from any page, open the **Setup** menu and click **Views**. The **Region Views List** opens.



2. Click **Create New View**. The **Create New View** page opens to the **General** tab.



3. Enter the **View Name** and provide a description.
4. Click **Next** or click the **Regions** tab. The **Regions** tab opens.
5. Select the check box for one or more regions whose resources you want to include in the view.
6. In each tab, select or enter the appropriate information, then click **Next**.
7. Click **Next** or click the **Resources** tab. The **Resources** tab opens.
8. Select the check box for one or more resources that you want to include in the view. As appropriate, use the available filters to limit the results in the list of resources.
9. Click **Next** or click the **Status Types** tab. The **Status Types** tab opens.
10. Select the check box for one or more status types that you want to include in the view. As appropriate, use the available filters to limit the results in the list of status types.
11. Click **Next** or click the **Sort Status Types** tab. The **Sort Status Types** tab opens.
12. Drag and drop the status types to put them in the order that you would like them displayed on the view.
13. Click **Next** or click the **Advanced** tab. The **Advanced** tab opens.
14. Select the appropriate settings for the view so that it displays the information in the way that you would like it to.
15. Drag and drop the resource types to place them in the order that you would like them displayed on the view.

16. Click on a resource type name and change the name displayed for that resource type on the view.
17. Click **Next** or click the **Users** tab. The **Users** tab opens.
18. Clear the check box to restrict the view to specific users.
19. Click **Save**.

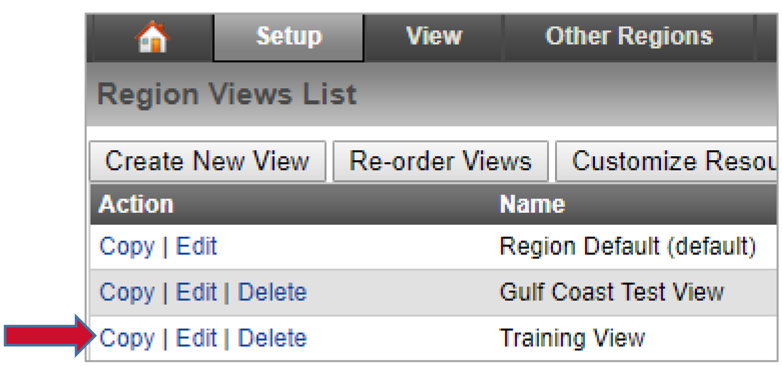
Edit a View

1. To edit a view, from any page, open the **Setup** menu and click **Views**. The **Region Views List** opens.
2. Locate the view you want to edit and click **Edit**. The **Edit View** page opens to the **General** tab.

3. In each tab, enter or select the appropriate information, then click **Next**.
4. When you have completed editing the view, click **Save**.

Copy a View

1. To copy a view, from any page, open the **Setup** menu and click **Views**. The **Region Views List** opens.
2. Locate the view in the list and click **Delete**. The **Create View: Copy** page opens to the

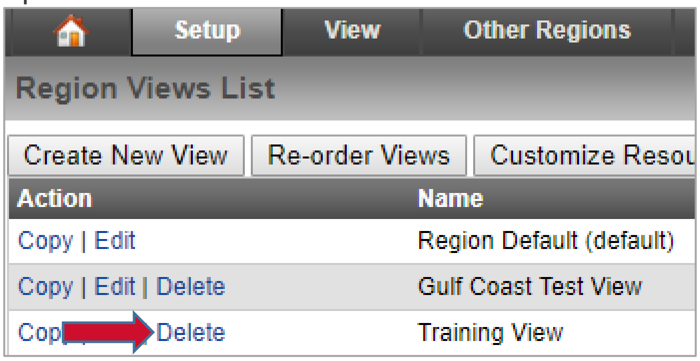


General tab.

3. In each tab, select or enter the appropriate information, then click **Next**.
4. When you have completed configuring the view, click **Save**.

Delete a View

1. To delete a view, from any page, open the **Setup** menu and click **Views**. The **Region Views List** opens.
2. Locate the view in the list and click **Delete**. The **Delete View Confirmation** page opens.

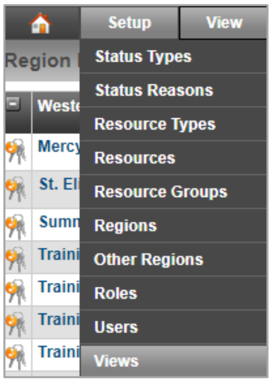


5. Click **Delete**. The **Region Views List** re-opens. The view no longer appears in the list and is no longer available to users.

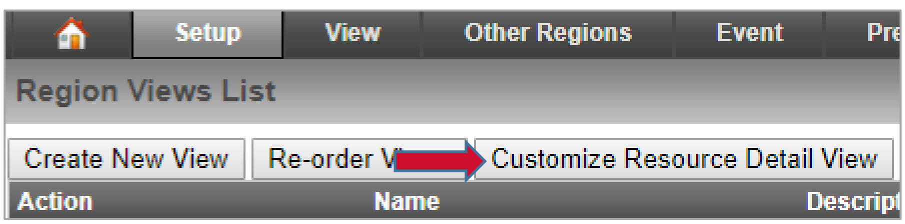
Managing the Resource Detail View

Edit the Resource Detail View

1. To edit the Resource Detail View, from any page, open the **Setup** menu and click **Views**. The **Region Views List** opens.

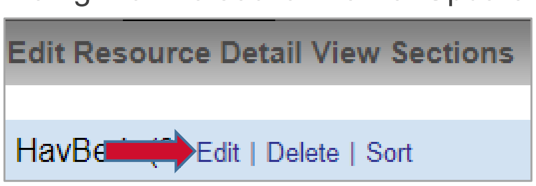


2. Click **Customize Resource Detail View**. The **Edit Resource Detail View Sections** page opens.



3. Create a new section by entering the name of the new section in the box above the **Create Section** button. Click **Create Section**.

4. Edit a section name by selecting the section in the left pane then clicking the **Edit** link to the right of the section name. Update the name and click **Submit**.

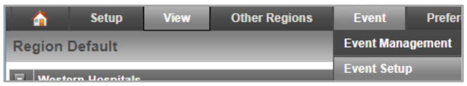


5. Drag and drop sections to rearrange their order on the **Resource Detail View**.
6. Rearrange or move the status types by selecting a section in the left pane and dragging and dropping them where you want them within a section or to another section.
   NOTE: Changes made to the order of status types on the **Resource Detail View** affect how they are displayed in an event.
7. Delete a section by selecting the section in the left pane then clicking the **Delete** link.
   NOTE: All status types in the section are moved to the **No Section Assigned** area.
8. When you have finished making changes, click **Save**.

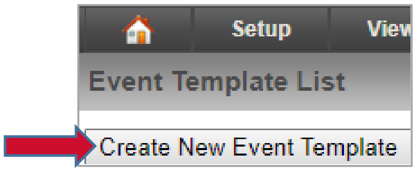
Managing Event Templates

Create an Event Template

1. To create an event template, from any page, open the **Event** menu and click **Event Setup**. The **Event Template List** opens.



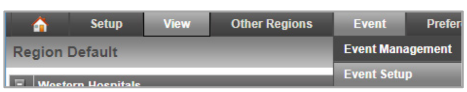
2. Click **Create New Event Template**. The **Create New Event Template** page opens.



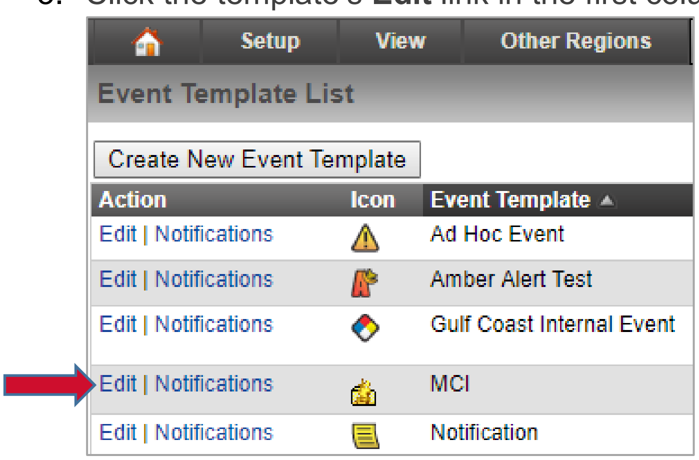
3. Complete the appropriate fields including **Template Name** and **Definition**.
4. Select the **Resource Types** that will be included in the event template.
5. Select the **Status Types** that will be included in the event template.
6. Click **Save**. The **Event Notification Preferences** page opens.
7. Select/Clear the notification check boxes so that the appropriate users are notified.
8. Click **Save**.

Edit an Event Template

1. To edit an event template, from any page, open the **Event** menu and click **Event Setup**. The **Event Template List** opens.



2. Locate the event template in the list.
3. Click the template's **Edit** link in the first column. The **Edit Event Template** page opens.



4. Change/update the fields as appropriate including selecting or clearing the check boxes for resources and selecting additional status types.
5. Click **Save**.

Configure Event Security

1. To configure event security, from any page, open the **Event** menu and click **Event Setup**. The **Event Template List** opens.
2. Locate the event and click the **Security** link in the first column. The **Event Security** page opens.
   NOTE: The event template must have the **Security** check box selected for the **Security** link to display.
3. Select or clear check boxes to select what users can activate or update events based upon this template**.**
4. Click **Save**

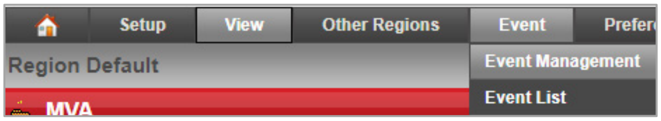
Edit Event Notifications

1. To edit event notifications, from any page, open the **Event** menu and click **Event Management**. The **Event Management** page opens.
2. Locate the event template and click the **Notifications** link in the first column. The **Event Notification Preferences** page opens.
3. Select/Clear the notification check boxes so that the appropriate users are notified in the appropriate manner.
4. Click **Save**.

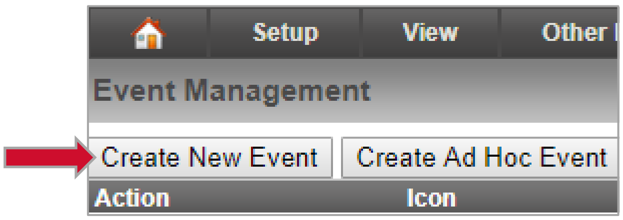
Managing Events

Create an Event from a template

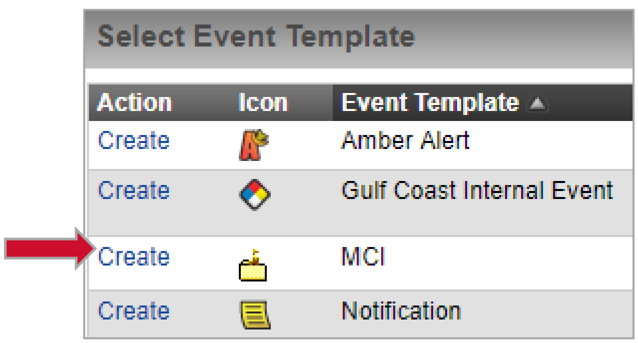
1. To create an event, from any page, open the **Event** menu and click **Event Management**. The **Event Management** page opens.



2. Click **Create New Event**. The **Select Event Template** page opens.



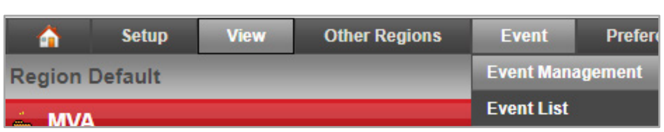
3. Locate the template you want to use for this event and click **Create** in the first column. The **Create New Event** page opens.



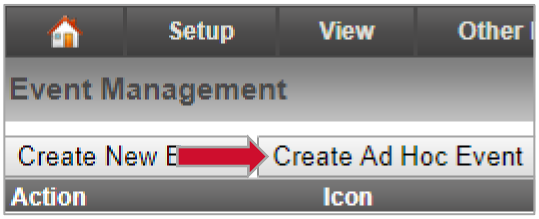
4. Enter information in the appropriate fields including **Title** and **Information.**
5. Click **Save** for an informational event or select resources as appropriate then click **Save.**

Create an Ad Hoc Event

1. To create an event, from any page, open the **Event** menu and click **Event Management**. The **Event Management** page opens.



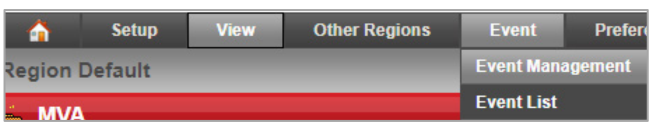
2. Click **Create Ad Hoc Event**. The **Create Ad Hoc Event** page opens.



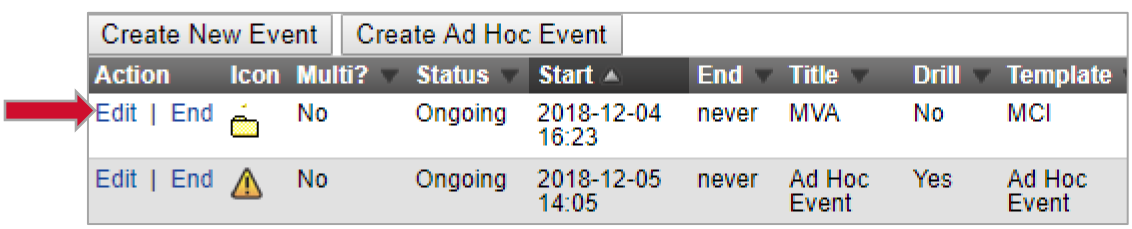
3. Enter information in the appropriate fields including **Title** and **Information.**
4. Click **Next**.
5. Select resources to be included in the event.
6. Click **Next**. The **Select Status Types** page opens.
7. Select the status types to be included in the event.
8. Click **Next.**
9. Review the information on the **Ad Hoc Event Confirmation** page.
10. Click **Yes** to create the Ad Hoc event.

Edit a Template Based Event

1. To edit a template-based event, from any page, open the **Event** menu and click **Event Management**. The **Event Management** page opens.



2. Locate the event and click the **Edit** link in the first column. The **Edit Event** page opens.
3. Add to or change the detail and settings for the event including the **Title** and **Information**. Add **Status Types** and add or remove **Resources to Participate in This Event.**

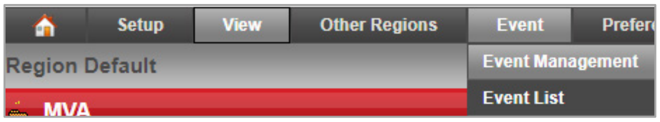


Action	Icon	Multi?	Status	Start	End	Title	Drill	Template
Edit | End		No	Ongoing	2018-12-04 16:23	never	MVA	No	MCI
Edit | End		No	Ongoing	2018-12-05 14:05	never	Ad Hoc Event	Yes	Ad Hoc Event

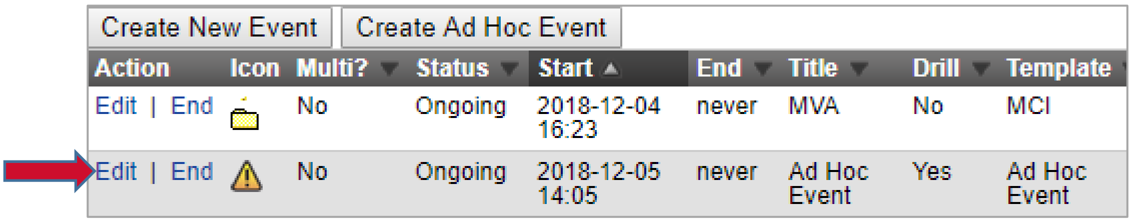
4. Click **Save**

Edit an Ad Hoc Event

1. To edit an ad hoc event, from any page, open the **Event** menu and click **Event Management**. The **Event Management** page opens.



2. Locate the event and click the **Edit** link in the first column. The **Edit Ad Hoc Event** page opens.

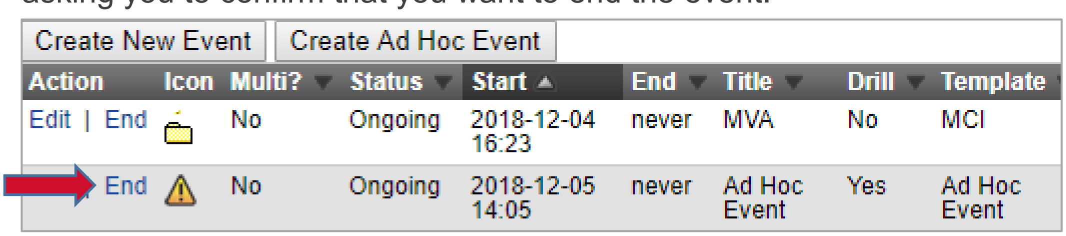


3. Add to or change the detail and settings for the event including the **Title** and **Information**.
4. Click **Next**. The **Select Resources** page opens.
5. If appropriate, add or remove resources from the event.
6. Click **Next**. The **Select Status Types** page opens.
7. If appropriate, add **Status Types** to the event.
8. Click Next. The **Ad Hoc Event Confirmation** page opens
9. Review the information and click **Yes** to confirm your changes

End an Event Manually

1. To end an event manually at any time, from any page, open the **Event** menu and click **Event Management**. The **Event Management** page opens.

2. Locate the event in the list and click the **End** link in the first column. A window opens asking you to confirm that you want to end the event.



3. Click **OK**. The window closes and the **Status** of the event changes to **Ended**.

Create an Event (Mobile)

1. Log in to the EMResource mobile application using your temporary account.
2. Tap **Start New Event** on the **Home** page or **New** on the **Events** page.
3. Select the event template that you want to use to create your event from the list.
4. Enter information in the appropriate fields including **Title** and **Information.**
5. Tap on **Resources** to select the resources to include in the event.
6. Once all resources are selected tap **Done** to return to the **New Event** page.
7. Tap **Start**. You will be taken to the **Events** page with all events listed.

Edit an Event (Mobile)

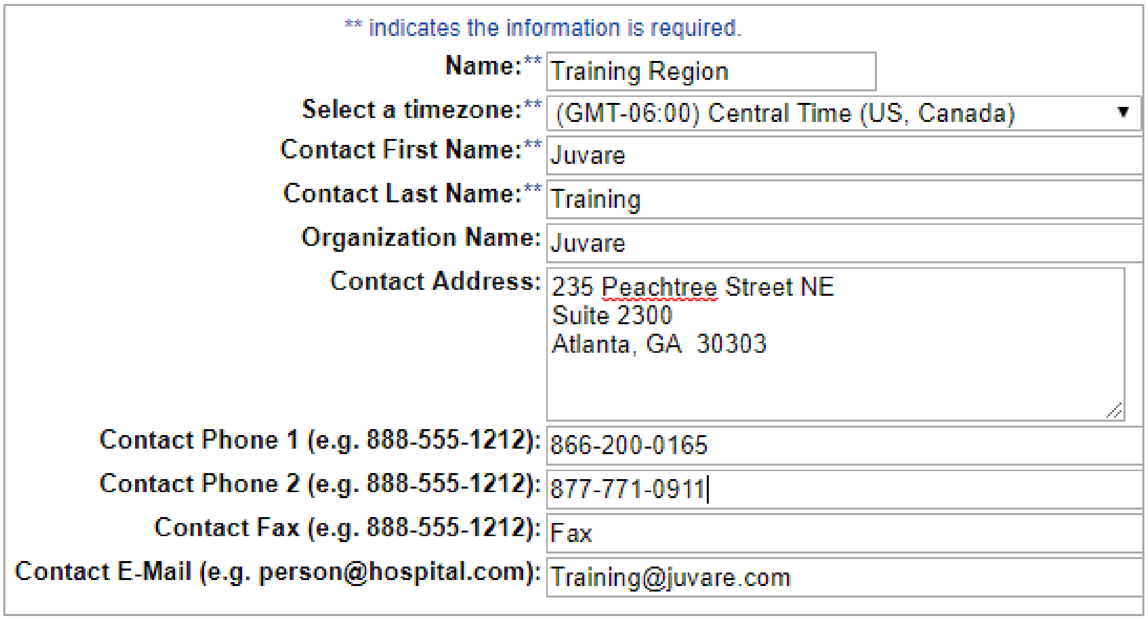
1. Tap on **Events**. The **Events** page will open.
2. Select the incident you want to edit from the list.
3. Tap **Edit Event**
4. Add to or change the detail and settings for the event including the **Title** and **Information**. Add **Status Types** and add or remove **Resources.**
5. Tap **Save.**

End an Event (Mobile)

1. Tap on **Events**. The **Events** page will open.
2. Select the incident you want to end from the list.
3. Tap **End Event.** A window opens asking you to confirm that you want to end the event.
4. Tap **End Event.** You will be taken to the **Events** page and the ended event will no longer be listed.

Regional Contact Information

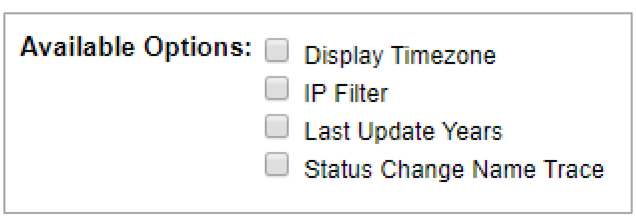
1. From any page, open the **Setup** menu in the main navigation bar and click **Regions**. The **Region List** opens.
2. Locate the region and click its **Edit** link. The **Edit Region** page opens.



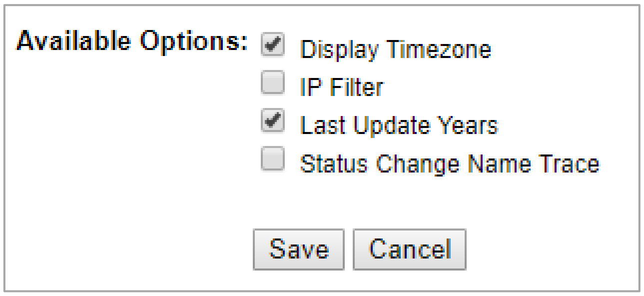
3. Validate/Update the **Contact First Name**, **Contact Last Name**, **Contact Phone 1**, **Contact Phone 2**, **Contact Fax**, and **Contact E-mail**. These items are displayed when users select **Contact** in the upper right corner of the application.

Available Options

1. From any page, open the **Setup** menu in the main navigation bar and click **Regions**. The **Region List** opens.
2. Locate the region and click its **Edit** link. The **Edit Region** page opens.
3. In the **Available Options** section, review the options.



4. Change the **Display Timezone** and **Last Update Years** settings and click **Save**.



5. Review how these changes affect the system.
6. Change the settings back to what they were and save the region.
7. Confirm that changes have been reverted.

Standard Status Types

1. From any page, open the **Setup** menu in the main navigation bar and click **Regions**. The **Region List** opens.
2. Locate the region and click its **Std Status Types** link. The **Standard Status Types** page opens.

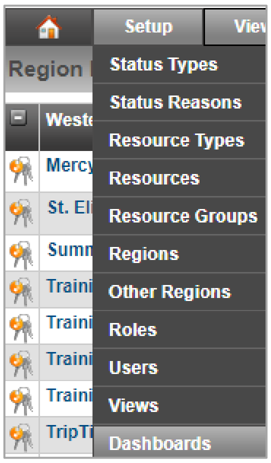
Available?	Add as Status Type?	Standard Status Type	Type	Description
☐	☐	Bed Availability: NICU Level 1	Number	Availability of NICU Level 1 beds. Level 1 Basic ? Provides care for neonatal resuscitation at every delivery; provides care for infants born at 35?37 weeks and are physiologically stable; provision of care to stabilize infants born at less than 35 weeks or who are ill until transfer to a higher level of care becomes available.
☐	☐	Bed Availability: NICU Level 2	Number	
☐	☐	Bed Availability: NICU Level 3	Number	
☐	☐	Bed Availability: NICU Level 4	Number	Availability of NICU Level 4 beds. Level 4 Subspecialty - Provides care for the mothers and comprehensive are of their infants of all gestational ages with the most complex and critically ill neonates/infants with any medical problems, and/or requiring sustained life support.

3. For any given standard status type, do the following:
   3.1. To make the standard status type available to this region, select its check box in the **Available?** column.
   3.2. To create a status type based on the standard status type, select its check box in the **Add as Status Type?** column.
4. Click **Save**.
5. Open the **Setup** menu and select **Status Types**. The **Status Type List** opens.
6. Locate the new status type that you created and click the **Edit** link in the first column.
7. Review the settings and information in the status type that was created.
8. Edit the status type and change the **Roles with view rights** and **Roles with update rights** and select the **Resource Types** that will report this status type.
9. Click **Save**. The **Status Type List** re-opens.

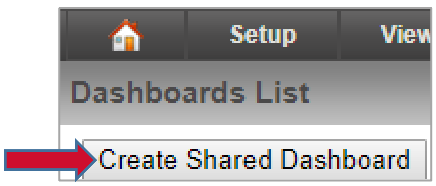
Managing Dashboards

Create a Regional Shared Dashboard

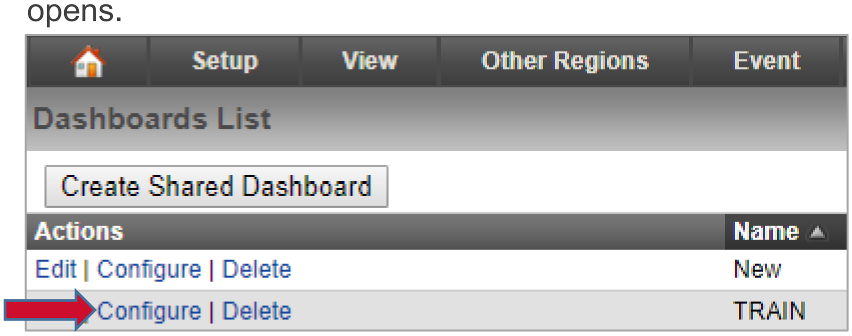
1. To create a regional shared dashboard, from any page, open the **Setup** menu and click **Dashboards**. The **Dashboard List** opens.



2. Click **Create Shared Dashboard**. The **Create Shared Dashboard** page opens.



3. Enter a **Name** for the dashboard and select the **Number of Columns**.
4. Select whether the dashboard is currently active or not and clear the **Active** check box as appropriate.
5. Select which users should have access to the dashboard and configure access appropriately if you select **Selected Roles** or **Selected Users**.
6. Click **Save**. The new dashboard appears in the list.
7. Locate the dashboard in the list and click **Configure** in the first column. The dashboard opens.

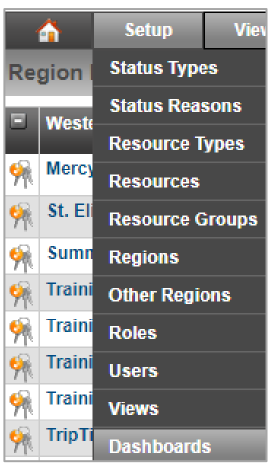


8. Click **Add Gadget**. The **Add Gadget** window opens.
9. Select a gadget from the list and click **Add**.

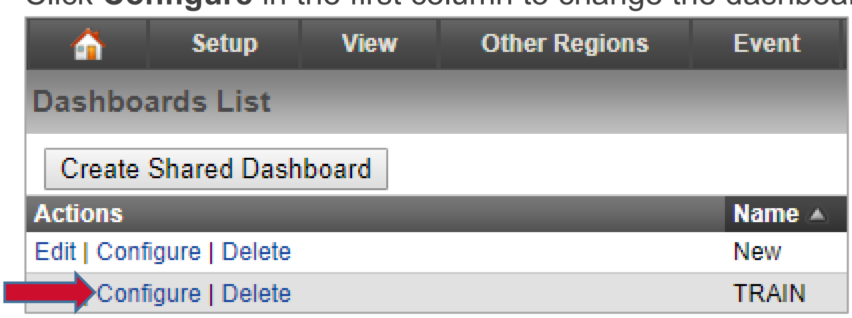
10. The configuration window for that gadget will open.
NOTE: Dashboards use the Standard Status Type so the name you see may be different from the name on a view.
11. Enter the parameters for the gadget you added.
12. Click **Done**. The gadget is added to the dashboard and the information will populate.
13. Add and configure additional gadgets.
14. Resize the length of the gadgets.
15. Drag and drop gadgets on the dashboard to re-order them.
16. When you are done configuring the dashboard, in the upper right, click **back**.

Edit a Dashboard

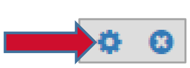
1. To create a regional shared dashboard, from any page, open the **Setup** menu and click **Dashboards**. The **Dashboard List** opens.



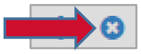
2. Click **Edit** in the first column to edit the **Name**, change the **Number of Columns**, select if the dashboard is **Active**, or edit **Access** to the dashboard.
3. Click **Save** when all you have completed these changes.
4. Click **Configure** in the first column to change the dashboard view.



5. Click on the gear icon in the top right corner of a gadget to change its parameters. Click **Done** when you have completed your changes to the gadget.



6. Click on the X in the top right corner of a gadget to delete it from the dashboard.



7. When you are done configuring the dashboard, in the upper right, click **back**.

View or Edit a User's Dashboard

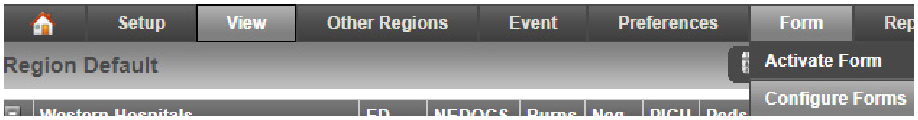
1. To view or edit a user's dashboard, from any page, open the **Setup** menu and click **Users**. The **Users List** opens.
2. Locate the user and click **Edit** in the first column. The **Edit User** page opens.
3. In section **3: Views**, locate **User Dashboards** and click **View User's Dashboard**. The **Dashboard for** page opens.

4. Use the drop-down list to select the dashboard that you want to view.
5. Edit the dashboard configuration for the user as appropriate by adding, resizing, moving, adjusting parameters for, or deleting gadgets.
6. Edit the **Name** or **Number of Columns** on the user's dashboard by clicking **Manage Dashboards** and selecting **Edit Dashboard**. Make the necessary changes for the user and click **Done**.
7. Click **Manage Dashboards** and in the list, click **Copy Dashboard**. The **Copy Dashboard** page opens. Enter a name for the dashboard and click **Done**.
8. Click **Manage Dashboards** and in the list, click **Delete Dashboard**. To confirm and delete the dashboard, click **Done**.
9. When you are done viewing or managing the user's dashboard, in the upper right, click **back**.

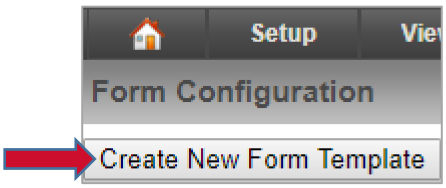
Managing Forms

Create a Form Template

1. To create a form template, from any page, open the **Form** menu and click **Configure Forms**. The **Form Configuration** page opens.



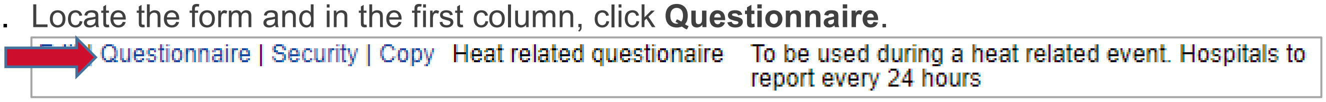
2. Click **Create New Form Template**.



3. In **Title**, enter the form template's title or name.
4. In **Description**, enter a description (purpose) of the form
5. In **Form Activation**, select how the form will be activated.
6. In **Completed Form Delivery**, select how the completed form is to be delivered.
7. Select the notification method(s) for this form (**How to notify** that the form has been completed).
8. Select the **Notification Sound** that you want to play for the completed form notification.
9. Indicate if the form is **Mandatory**.
10. Indicate if the form is **Active**.
11. Click **Next**.
12. Complete the appropriate information for the form activation and delivery methods that you selected.
13. If you see the **Form Security Settings** page, select the check boxes for the appropriate permissions (**Active Form** and/or **Run Report**) for the users.
14. Click **Save**. The **Form Configuration** page re-opens. Your new form appears in the list.

Configure the Form Questionnaire

1. To configure the form questionnaire, from any page, open the **Form** menu and click **Configure Forms**. The **Form Configuration** page opens.
2. Locate the form and in the first column, click **Questionnaire**.

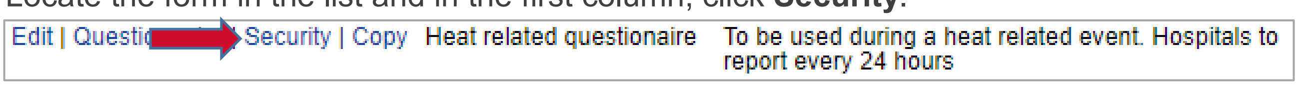


3. Add instructions. Click **Insert** and in the menu, select **Instructions**. The **Instructions** window opens. In the text editor, enter and format the instructions.

4. Add a group. Click **Insert** and in the menu, select **Group**. The **Group** window opens. Enter the **Label** for the question group or leave it blank and click **Save**.
5. Add an element set to the group. Click **+Insert** and in the menu, select **Element Set**. In the **Label** field, enter the name of the set or leave it blank and click **Save**.
6. Populate the element set by clicking the **+** and selecting the element type or by dragging an element from the library into the element set.
   - 6.1. In the **Attributes** section, enter the information requested for that element type.
   - 6.2. If available and appropriate, enter information in the **Validations** section.
   - 6.3. If available, select or enter a list in the **Choices** section.
   - 6.4. If available and appropriate, enter a value in the **Default Value** section.
   - 6.5. Click **Save**.
7. Add a table. In the group click **+Insert** and in the menu, select **Table**.
   - 7.1. In the **Rows** section, for **New Row** enter the name of the row. Click the **+** to add additional roles and enter names for them.
   - 7.2. In the **Columns** section, for **New Column** enter the name of the column. Select the type of content for the column. If appropriate, click the edit icon and enter the **Attributes**, **Validations**, and **Default Value** for that column. Click the **+** to add additional columns and enter names and configure them.
   - 7.3. Drag and drop the rows and columns to change their order within the table.
   - 7.4. Click **Save**. The **Table** window closes.
8. Click **Preview** to preview the questionnaire.
9. Click **Close Preview** to close the **Preview** window.
10. Click **Save and Publish** to publish the form and make it available for use.

Edit Form Security

1. To edit the Form Security, from any page, open the **Form** menu and click **Configure Forms**. The **Form Configuration** page opens.
2. Locate the form in the list and in the first column, click **Security**.



3. Select or clear the check boxes for user to provide them with access to **Activate Form** and/or **Run Report**.
4. Click **Save**. The **Form Configuration** page re-opens.

Reporting

Notification Report

1. To run the notification report, from any page, open the **Report** menu and click **Notification Report**. The **Notifications Report** page opens.
2. Enter some or all of the fields to define the report parameters.
3. Click **Search**.
4. If you want to download the report, click **Export List**. The report is downloaded according to your browser settings.

Roles/Rights Grid Report

1. To run the roles/rights grid report, from any page, open the **Report** menu and click **Admin Reports**. The **Admin Reports Menu** opens.
2. In the **Menu Option** column, select **Roles/Rights Grid**. The **Roles/Rights Grid** page opens.
3. Click **Generate Report**. The report is automatically downloaded according to your browser settings.

Resource Details Report

1. To run the resource details report, from any page, open the **Report** menu and click **Resource Reports**. The **Resource Reports Menu** opens.
2. In the **Menu Option** column, select **Resource Details**. The **Resource Detail Report** page opens.
3. In the **Resources** tab, select the check boxes for every resource you want to include.
4. At the top, click the **Status Types** tab or at the bottom click **Next**.
5. On the **Status Types** tab, select the check boxes for any status types you want to include. You are not required to select any status types.
6. Click **Generate Report**. The file is downloaded according to your browser settings.

Users Report

1. To run the users report, from any page, open the **Setup** menu and click **Users**. The **Users List** opens.
2. Use the filters to select the users that you want to report on.
3. Click **export** in the top right corner. The file is downloaded according to your browser settings.

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