

HC Standard®

Administrator Manual

Version 4.4

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HC Standard® Administrator

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Chapter 1 - User Manual Overview

1 - 1: Roles in HC Standard®

Users: HC Standard® Users view and update information in the system.

Sub-Admins: HC Standard® Administrators manage users under their jurisdiction and provide access to items created by an HC Standard® Administrator (Admin).

Admins: HC Standard® Administrators create, manage, and grant item access to users and Sub-Admins. This role has unlimited system access.

1 - 2: Audience for this Manual

This manual is intended for users (including Admins) with different degrees of knowledge and experience with the system. A glossary of terminology is included at the end of this manual.

- **Admin:** HC Standard® Administrators have unlimited system access and will learn to manage aspects of the system and will also enable users to have access to specific areas of the system. The key administrator functions include item creation and permissions.

HC Standard® is a healthcare situational awareness system, and will be configured in accordance with each organization's policies and procedures involving healthcare information management. By utilizing this system, access may be granted to sensitive healthcare information and Patient Health Information (PHI). As such, all organizations and users are considered HIPAA associates and must exhibit all the care and security control as with any other sensitive PHI. For more information about the intent of this system within specific organizations, please see your supervisor or Admin.

1 - 3: System Requirements

HC Standard® users, granted appropriate permissions, may access HC Standard® over the Internet using any device that has the following features:

System Requirements

PC

- Microsoft Internet Explorer 10 (or higher); or the latest version of Google Chrome or Mozilla Firefox
- Adobe Acrobat Reader 6.0+ for Forms; other PDF reader software may be used but is not supported
- 1.6 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor
- Minimum 1gb (or more) RAM
- Internet Access

Mobile Device

- *iOS 5+*
- *Android 4+*

Chapter 2 - Getting Started with HC Standard® Administrator Mode

2 - 1: Login URL

To launch HC Standard®, open any web browser and enter the organization's access **URL** into the navigation bar.

- HC Standard® URL: _____

Each organization is provided a unique access URL. If the access URL is unknown, please contact GER Technical Support by calling **1.866.242.4035** or by emailing **support@ger911.com**.

2 - 2: Logging In

After successful navigation to the organization's access URL, the login prompt will appear on the screen. In order to successfully log into the system, a valid username and password are required. This credential-based system ensures that only authorized users gain access to admin tools in HC Standard®. To log into HC Standard®, as shown in FIGURE 2-1:

1. Type the valid **Username** and **Password**, provided by an Admin.
2. Click or tap the **Sign in** button.

The screenshot shows the HC Standard® Customer Login interface. At the top, the GER logo is displayed next to the text "HC STANDARD 4 TRAINING SITE". The center of the page features the HC logo. Below it, the text "HC Standard® Customer Login" is centered, followed by "Web client: v4.0.0.245". The main area contains a login form with two input fields: "Username" and "Password". A red circle with the number "1" is placed over the "Username" field. A green circle with the number "2" is placed over the "Sign In" button, which is highlighted in green. At the bottom left of the form is a link "Can't Sign In?", and at the bottom right is the GER logo. The footer of the page provides technical support contact details, including a toll-free number, email, and web address.

FIGURE 2-1: Login Prompt

The login may fail for the following reasons:

- An invalid username/password combination will lead to an error message. Proceeding into the HC Standard® application will not be possible until a valid username and password are entered.
- Three consecutive attempts to log in with a valid username, but an invalid password will result in an error message stating, **Account is Locked Out**. Logging into the system with that specific username will not be possible (even with the valid password) for the predetermined lockout period.



Note: The default lockout period is 15 minutes. In order to log in with a locked account, another Admin must be contacted.

2 - 3: Entering Admin mode

Only user accounts designated with HC Standard® Administrator permissions will have access to HC Standard® Admin mode. After the initial login is completed, Admin mode can easily be switched on and off within the HC Standard® application. In the example below, the user is entering Admin mode. To access HC Standard® Admin mode, as shown in FIGURE 2-2:

1. Click or tap the **User** icon.
2. Click or tap the **Admin mode** option located in the drop-down menu.

The screenshot shows the HC Standard 4.0 application interface. At the top, there is a navigation bar with icons for Home, Notifications (with 1 notification), Dashboards, Workspaces, Bookmarks, and Help. On the far right of the navigation bar is a user profile icon labeled "Training User" and "Logged in at: 8:51 AM". Below the navigation bar, the main content area displays the "WELCOME TRAINING USER!" message. On the left side, there is a sidebar with a "RECENTLY ADDED" section. On the right side, there is a dropdown menu with several options: Profile, Settings, Admin mode (which is highlighted with a yellow circle containing the number 2), Enter Fullscreen, and Logout.

FIGURE 2-2: Admin mode in User Tab



Important! If Admin mode is unavailable, the appropriate administrator permissions have not been assigned.

2 - 4: Leaving Admin mode

Admin can leave Admin mode at any time. To leave Admin mode and return to HC Standard®, as shown in FIGURE 2-3:

1. Click or tap the **User** icon.
2. Click or tap the **Admin mode** option located in the drop-down menu.
OR
3. Click or tap the **Home** icon.

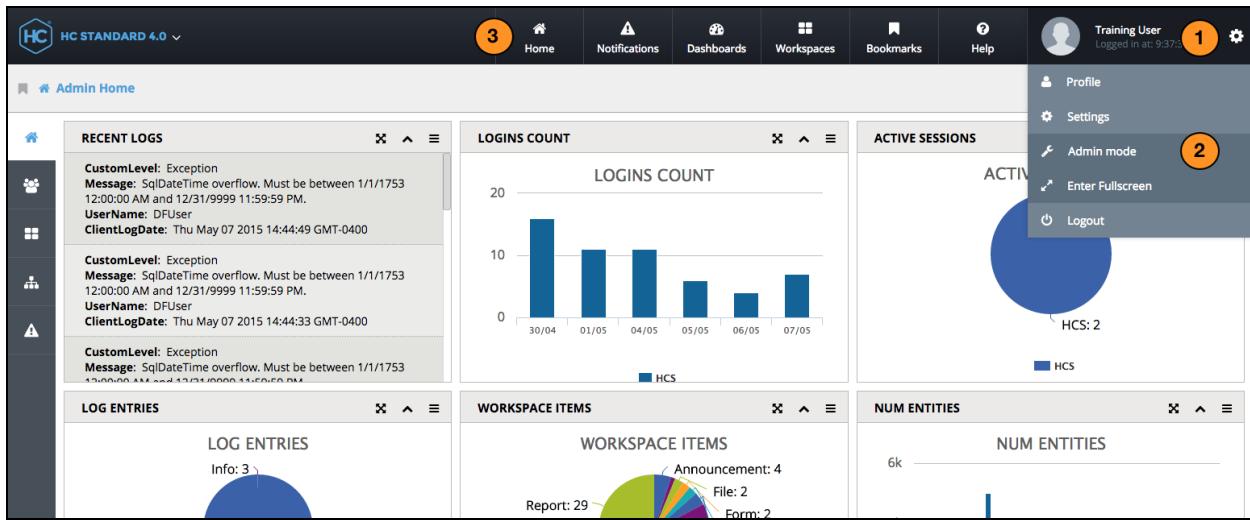


FIGURE 2-3: Leaving Admin mode

2 - 5: Admin Dashboard

After logging into HC Standard® and entering Admin mode, the Admin dashboard appears on the screen. The dashboard displays relevant information about the system and provides access to all administrative functions. This screen can be accessed at any time while in Admin mode.

Admin dashboard items, as shown in FIGURE 2-4, include:

1. **Logins Count:** Displays the historical number of users that have logged into the system. The graph distinguishes between the different platforms from which a user has logged in.
2. **Workspace Items:** Displays the total amount of workspace items, separated by item type.

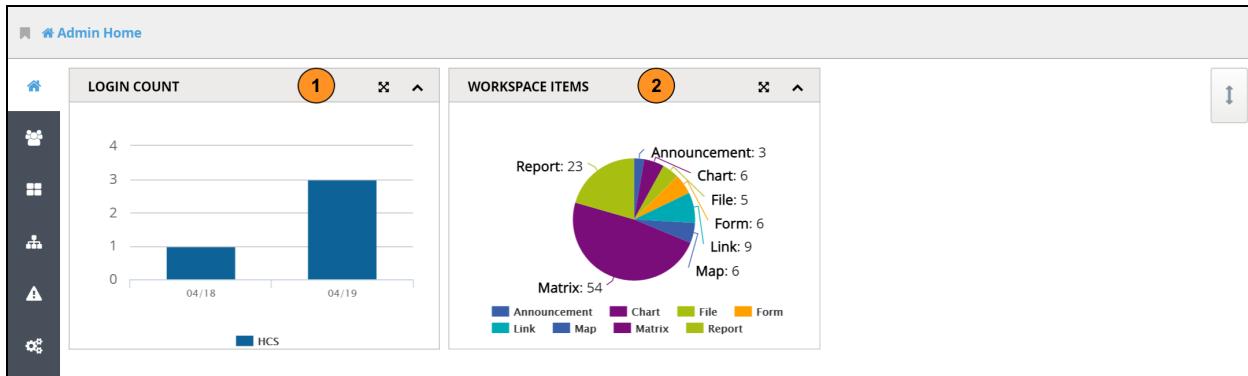


FIGURE 2-4: Admin mode Dashboard

The Admin dashboard is accessible from anywhere in Admin mode. To return to the Admin dashboard, as shown in FIGURE 2-5:

1. Click or tap the **Admin Dashboard Home** button.

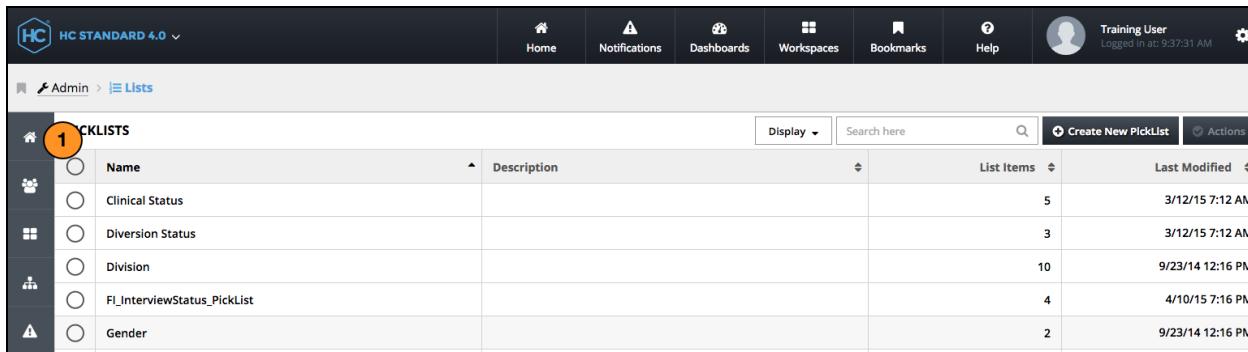


FIGURE 2-5: Admin Dashboard Home button

Admin functions are grouped into categories and displayed as icons in the left-hand side of the screen. If the application is being used on a smaller screen, it will adapt to the appropriate size for the web browser and the icons may display in a row at the top of the screen.

2 - 5.1 Arrange and Size Dashboard Items

Items selected for the dashboard are displayed in panes and arranged by rows & columns.

The ability to arrange panes on the dashboard allows for the management of pertinent information by moving the most used data to the best location on the dashboard. Each pane can be moved to any location dashboard to provide the best visual awareness for that information.

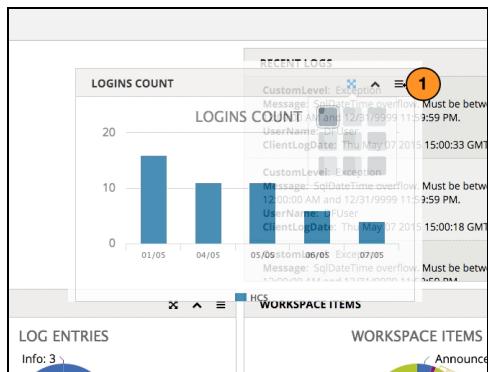


FIGURE 2-6: Move Dashboard item

To move a pane on the dashboard, as shown in FIGURE 2-6:

1. Click or tap on the **3 line** button on the dashboard header.
2. Drag the window to the desired location.

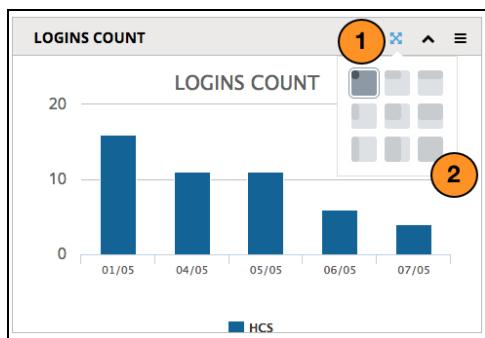


FIGURE 2-7: Adjust Dashboard Item Size

Each pane on the dashboard may be resized on the dashboard. To re-size a dashboard item, as shown in FIGURE 2-7:

1. Click or tap on the **expanding arrows** button.
2. Select the item size.

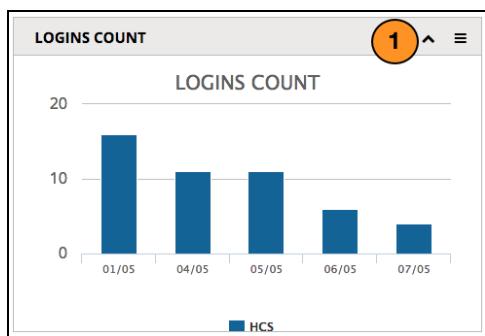


FIGURE 2-8: Collapse/Expand Dashboard Item

Each pane on the dashboard may be collapsed or expanded on the dashboard. To collapse or expand a dashboard item, as shown in FIGURE 2-8:

1. Click or tap the **up arrow** button to collapse an item. Click or tap again to expand the item.



Note: Admin Dashboard items cannot be changed, added or removed; they can only be rearranged.

2 - 6: Categories

There are four different categories of Admin functions within the Admin mode. Each category contains tools that aid in the management of different functions and assets. The tools for each category are discussed within the corresponding chapters of this manual.

The four categories, as shown in FIGURE 2-9, include:

1. **Users, Groups, and Permissions:** This **Manage My Users** section contains tools to manage individual user accounts, groups of users, and permission sets.
2. **Workspaces:** Workspaces are containers that hold the different functions and data a user can access. This **Manage My Workspaces** section contains tools that help with the creation, management, and access to view and/or update workspace content.
3. **Entities:** In an HC Standard® matrix, the rows represent entities and the columns represent measures. The tools in the **Manage My Entities** section manage information relating to these, as well as lists and forms.
4. **Notifications:** Within HC Standard®, messages can be created, saved as templates, and sent to any combination of users and groups via the HC Standard® user interface, e-mail or SMS text. This **Manage My Notifications** section contains tools that aid in the creation and distribution of messages.
5. **System:** Logs and system-wide configuration options are managed in the **Manage My System** section. These tools should only be used by GER technical support.

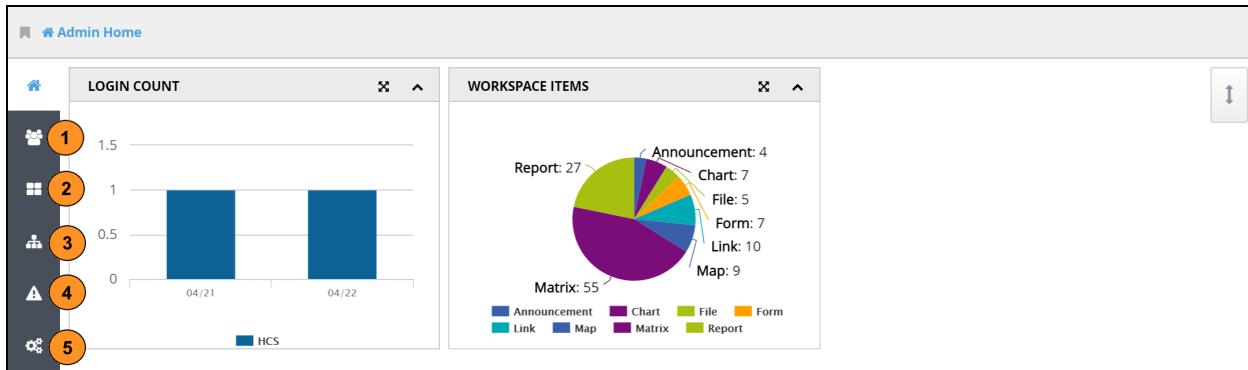
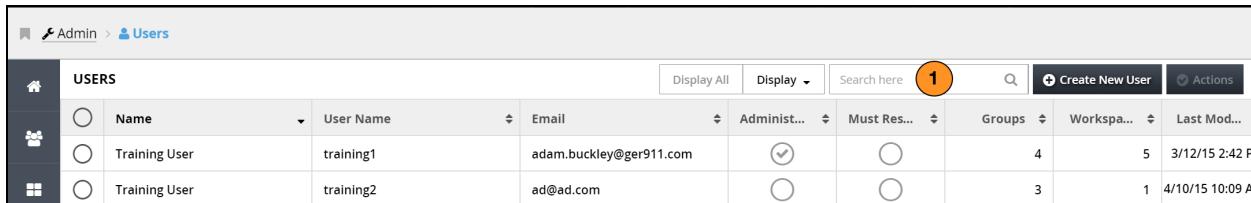


FIGURE 2-9: Admin Categories

2 - 7: Searching, Sorting, and Navigating

There are several additional types of controls available throughout the HC Standard® Admin mode, including searching and sorting. These controls become available to the user when a tool that contains items in a list is selected.

- Whenever searching is available, a **search box** will appear, as shown in FIGURE 2-10.



USERS									
	Name	User Name	Email	Administ...	Must Res...	Groups	Workspa...	Last Mod...	Actions
<input type="radio"/>	Training User	training1	adam.buckley@ger911.com	<input checked="" type="checkbox"/>	<input type="radio"/>	4	5	3/12/15 2:42 PM	
<input type="radio"/>	Training User	training2	ad@ad.com	<input type="radio"/>	<input type="radio"/>	3	1	4/10/15 10:09 AM	

FIGURE 2-10: Search Bar

After entering a search string into the box, the items listed on the current page will be filtered (usually by **Name**), so that only those containing the string are displayed. The search can be changed or modified by replacing the text in the box.



Note: A search will ignore case and return any upper or lower case entries that match the search criteria.

When items are displayed in a table in HC Standard® Admin mode, they can be sorted by any column in the table, as shown in FIGURE 2-11.

- Click or tap the column **header** to toggle between sorting in ascending and descending order. Click or tap on a column header a third time to clear the sorting for a column.
- A small **arrow** pointing up or down, at the right side of each column header, indicates the selected order.



REPORTS			
	Name	Description	Workspaces
<input type="radio"/>	Incident Summary NEW	New version of the Incident Summary Report	1
<input type="radio"/>	Incident Summary Report	Incident Summary Report	1
<input type="radio"/>	Measure Modification NEW	New version of the Measure Modification Report	1
<input type="radio"/>	Measure Modification Report	Measure Modification Report	0

FIGURE 2-11: Example: Ascending Sort applied to Name

2 - 8: Selecting Items from an Available List

In different locations in Admin mode, it is possible to select items from a list of all objects of a certain type that are currently available in the system. FIGURE 2-12 shows an example of how an Admin can select the matrices to be included within a new workspace. Instructions for accessing tools, like the **Create New Workspace** tool, are provided in their respective sections within this manual.



Note: Items are added to or removed from the list the same way in all scenarios.

To add available items to the new list, as shown in FIGURE 2-12:

1. Click or tap on the **Add <Item>** button to open the **Add <item>** dialog box. In FIGURE 2-12, the **Add <Item>** button is labeled **Add Matrices**.

The screenshot shows the 'Create New Workspace | Matrices' interface. At the top, there's a navigation bar with tabs: Details, Groups, Matrices (which is selected and highlighted in blue), Announcements, Links, Maps, Reports, Files, and Charts. Below the navigation bar is a search bar with the placeholder 'Filter matrices'. A large list area contains three items: 'Matrices', 'Event Patients', and 'Patient Information', each preceded by a radio button. At the bottom of this list is a summary: 'TOTAL ITEMS: 2 SELECTED ITEMS: 0'. On the right side of the screen are 'Save' and 'Back' buttons, and a 'Remove Selected' button. A small warning icon is visible on the left.

FIGURE 2-12: Add Matrices Button

In FIGURE 2-13, matrices are being added to a workspace.

1. Click or tap the **circle** for each item to be added.
2. Click or tap the **Add Selected** button.
3. Click or tap the **Done** button to close the **Add <Item>** dialog box.

This screenshot shows the 'Create New Workspace | Matrices' interface after some items have been selected. The 'Matrices' tab is still active. A search bar at the top has 'hospital' typed into it. Below the search bar, there are two buttons: 'Add Selected' (highlighted with a red circle) and 'Done' (also highlighted with a red circle). The list of items now includes 'Name' (selected), 'PTS - Hospital A', and 'PTS - Hospital B'. To the right of the list, there are columns for 'Description' and 'Category' (e.g., 'Matrices', 'Event Patients', 'Patient Information'). At the bottom, the summary shows 'TOTAL ITEMS: 2 SELECTED ITEMS: 0'. The right side features 'Save' and 'Back' buttons, and a 'Remove Selected' button. A warning icon is present on the left.

FIGURE 2-13: Add Items

In FIGURE 2-14, a matrix is being removed from the workspace. To remove items from a list:

1. Click or tap the **circle** for each item to be removed.
2. Click or tap the **Remove Selected** button.

This screenshot shows the 'Create New Workspace | Matrices' interface after one item has been selected for removal. The 'Matrices' tab is active. The search bar now shows 'Patient'. A single item, 'Patient Patients', has a checked radio button next to it (highlighted with a red circle). The 'Remove Selected' button on the right side of the screen is also highlighted with a red circle. The list below shows 'Patient Patients' and 'Patient Information'. The bottom summary shows 'TOTAL ITEMS: 2 SELECTED ITEMS: 1'. The right side includes 'Save' and 'Back' buttons, and a 'Remove Selected' button. A warning icon is on the left.

FIGURE 2-14: Remove Selected Items

Chapter 3 - Designing Your HC Standard® System

3 - 1: Before You Get Started

HC Standard® was designed to be flexible and customizable in order to efficiently meet the needs of individual organizations. Therefore, it is important to fully understand and document the organization's current business processes before starting to configure the system.

To build out a system that fits into each unique business process, it is important to visually map out the process. This aids in understanding the needs of key users within an organization. Spending this time on the front end will aid in a more efficiently designed system.

Generally, users only need access to critical job-specific information. Therefore, organizations are strongly encouraged to start the design of each system slowly and with a clear and simple approach. This eliminates unnecessary confusion for various users.

One of the most important components of building out an HC Standard® system is giving users access to data. This manual explains how to create and modify the elements discussed, and how to make them available within HC Standard®.

3 - 2: Users: Key Groups and their Respective Roles

Begin by listing all of the potential users and categorizing them into different groups. Groups should be created based on related job duties and responsibilities. Each group will be given access to certain data in HC Standard®, along with the permission to view and/or edit that data. Keep in mind that individual users can be placed in more than one group, and entire groups can be placed within other groups.

3 - 2.1 Identify Key User Groups

Make a list of all the key groups within the organization. Ensure that all of the key users have an opportunity to identify the groups involved in their areas of operation. For example, user groups might include "Responders", "Leadership" and "All Employees".

3 - 2.2 Identify Administrators (Admins)

Admins are users with advanced privileges in HC Standard®. Admins have the ability to create and manage users and permissions, workspaces and workspace items, entities, and notifications.

Any Admin user given permission to make changes to matrices or entity groups must be in the **System Notifications** user group. Users in this group will receive notifications, emails, or text messages when changes to matrices or entity groups are completed.



Important! The System Notifications user group should never be deleted.

3 - 2.3 Identify Sub-Administrators (Sub-Admins)

Depending on the size of an organization and scale of the system, Admin responsibilities may need to be divided up among certain users. When a user is delegated to perform some, but not all, Admin functions in the system, the user is considered a sub-administrator, or **Sub-Admin**.

3 - 2.4 Identify Key Operational Duties of Group Members

After identifying the key user groups within the organization, the next step is identifying elements that each group needs to access.

For example, All Employees may need to have access to summary reports and charts, but may not be given permission to update the status of a specific item on the 5th floor of a building. Therefore, a top down approach is recommended. To do this, first identify the general areas of responsibility for each group and the related tasks the users will need to perform. It is easier to go back later and refine permissions for certain members of a group who require a higher level of access.

3 - 3: Data: Entities and their Characteristics

It is necessary to identify the entities that need to be tracked and the information about these entities that needs to be collected. FIGURE 3-1 is an example where the entities being tracked are patients and the data being collected about each patient includes age, allergies, and triage information.

EVENT PATIENTS											
	Patient ID	Address	Age	Allergies	Amputati...	Arrival Ti...	Bleeding ...	Blunt Tra...	Burn	Triage St...	
<input type="radio"/>	Patient #4986	1457 Penn A...	33.00		<input checked="" type="checkbox"/>	02/12/2010 7...	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	Minor	
<input type="radio"/>	Patient #4983	123 Main St.	79.00		<input type="radio"/>	02/12/2010 7...	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	Deceased	
<input type="radio"/>	Patient #4972	666 Hollywo...	29.00		<input type="radio"/>	02/12/2010 7...	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>	Deceased	

FIGURE 3-1: Fully realized matrix example

3 - 3.1 Identify Entity Groups

Entities are the things that can be tracked. Entities of the same type are put into entity groups (e.g. "Patients", "Buildings", "Vehicles", or "Equipment").

3 - 3.2 Identify Measures

Organizations must determine what of information needs to be collected about each entity. Each category of information is known as a measure. Measures show the status of the entities and contain a single piece of information that needs to be tracked. For example, status and features, such as Vehicle Condition and Wheel Base are measures that describe Vehicle entities.

Once it is clear what needs to be tracked and what specific data should be collected, it is much easier to begin to build out an HC Standard system to meet unique needs and business processes.

3 - 3.3 Using Administrator Tools

Certain items contained in HC Standard®, including charts and reports are built out from other items, so there is a logical sequence to creating them when starting from scratch. The **Users** category is a good place to start.

Chapter 4 - Users and Permissions

The **Users** category contains multiple tools including the **Users** tool, for management of individual user accounts, and the **Groups** tool, which allows users to be associated and assigned permissions en masse. FIGURE 4-1 shows the **Users** category.

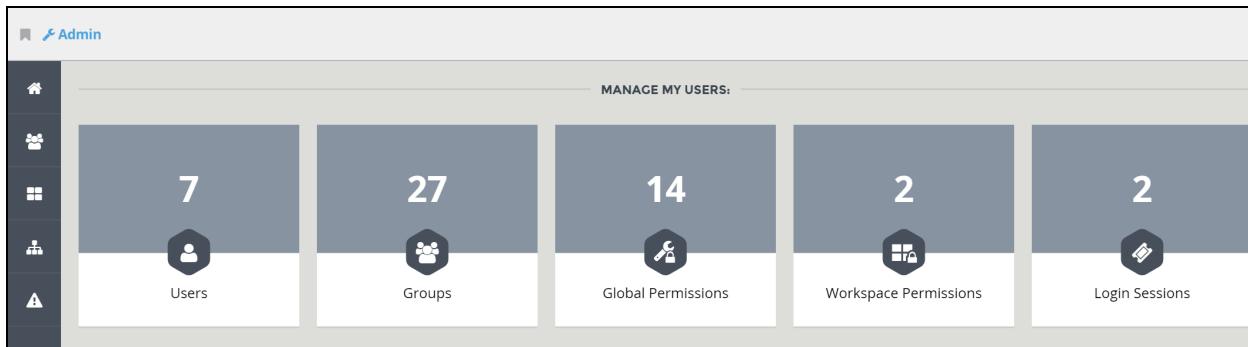


FIGURE 4-1: Users, User Groups, and Permissions

Access to HC Standard® workspaces, containing all data in the system, is granted only to user groups that have been assigned to those workspaces and given a set of permissions. The **Users**, **Groups**, **Permissions**, and **Sessions** tools are used to provide users with the ability to view and work with data in HC Standard®. A user who is not assigned to any groups will see nothing in HC Standard®.

4 - 1: Users

To manage users, as shown in FIGURE 4-2:

1. Click or tap on the **Users** and **Permissions** icon.
2. Click or tap on the **Users** icon under the **Manage My Users** section.

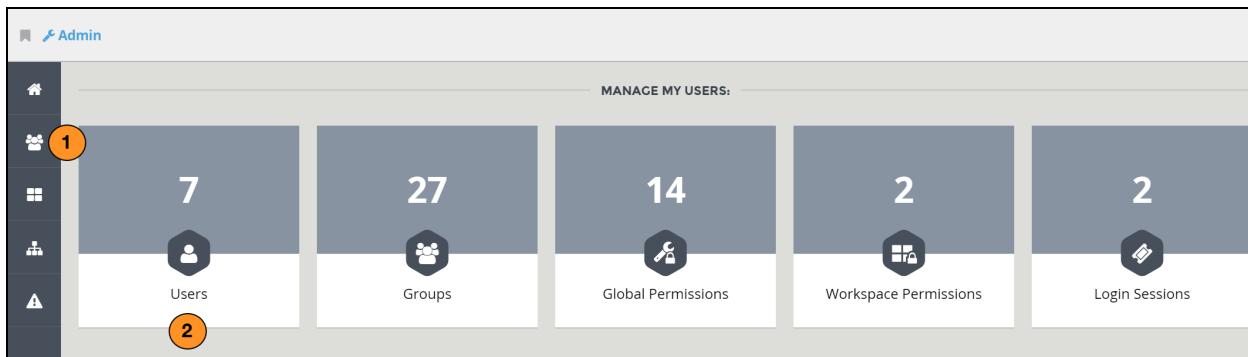


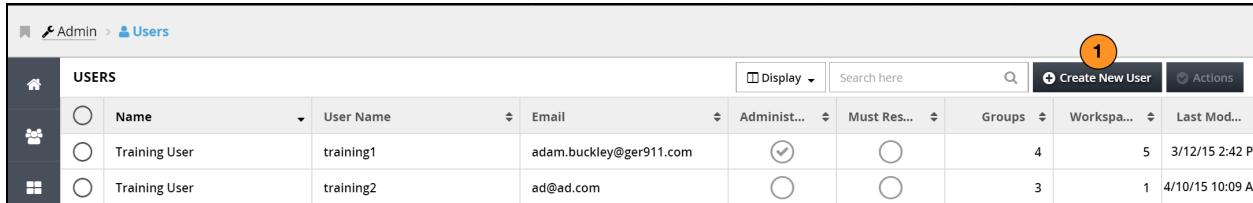
FIGURE 4-2: Users

On the main **Users** page, all existing users in the system are listed by name, along with preferences and other information associated with each account.

4 - 1.1 Creating Users

To create a new user in the system, as shown in FIGURE 4-3:

1. Click or tap the **Create New User** button.

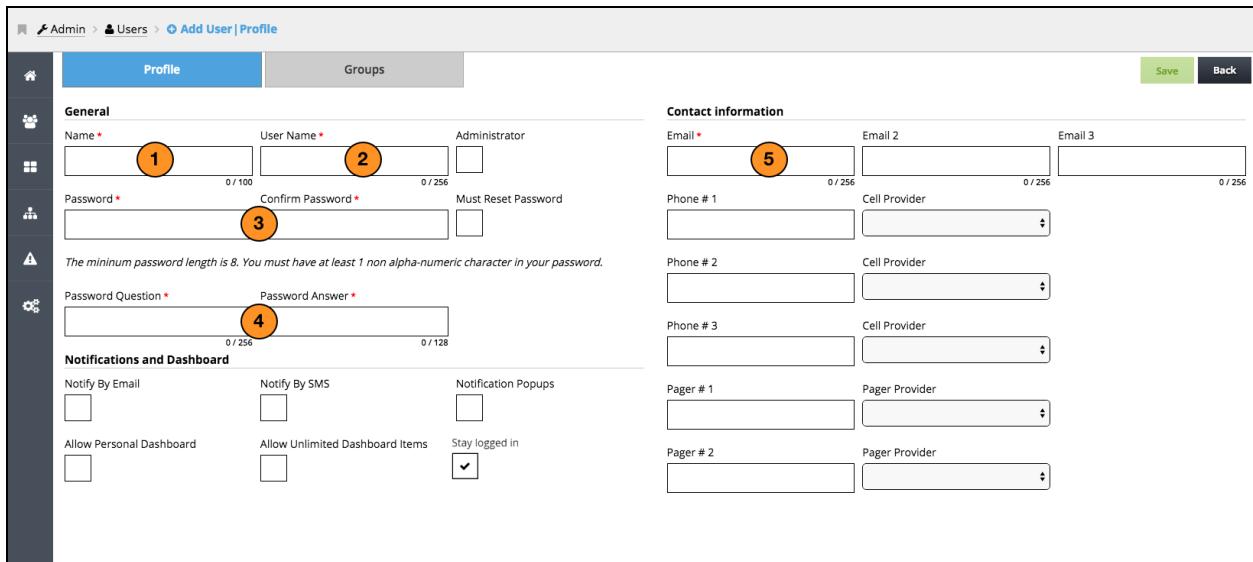


USERS									Actions	
	Name	User Name	Email	Administrator	Must Reset...	Groups	Workspa...	Last Mod...		
	Training User	training1	adam.buckley@ger911.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	5	3/12/15 2:42 PM		
	Training User	training2	ad@ad.com	<input type="checkbox"/>	<input type="checkbox"/>	3	1	4/10/15 10:09 AM		

FIGURE 4-3: Create New User Button

The **Add User** tool will open with the **Profile** tab already selected. The following are required fields to enter and are represented with a red asterisk, as shown in FIGURE 4-4:

1. Enter a **Name** for the account (usually the full name of the person who will be using it).
2. Enter a **User Name** that will be required at login.
3. Enter a **Password** and **Confirm Password** for the user.
4. Enter a **Password Question** and **Answer**.
5. Enter an **Email** address for the user.



Profile
Groups

General
Contact information

Name *

User Name *

Administrator

Password *

Confirm Password *

Must Reset Password

The minimum password length is 8. You must have at least 1 non alpha-numeric character in your password.

Password Question *

Password Answer *

Email *

Email 2

Email 3

Phone # 1

Cell Provider

Phone # 2

Cell Provider

Phone # 3

Cell Provider

Pager # 1

Pager Provider

Pager # 2

Pager Provider

Notifications and Dashboard

Notify By Email

Notify By SMS

Notification Popups

Allow Personal Dashboard

Allow Unlimited Dashboard Items

Stay logged in

FIGURE 4-4: Add User - Profile

No other fields are required to be entered. However, if a phone number is not provided, the user will not receive text messages containing notifications. For more information, see "Notifications" on page 108.

FIGURE 4-5 shows additional fields to enter for a user.

1. Click or tap the **Administrator** checkbox to grant users access to the Admin mode. The number of accounts that can be designated as administrator is limited by the HC Standard® license. If Admin privileges have been assigned for too many accounts, the action will be blocked, and a message will be sent stating that the number of Admin accounts is limited.
2. Click or tap the **Must Reset Password** checkbox to require the user change the password immediately upon logging into the system with the existing password for the first time.
3. Enter **Cell** and **Pager** information to receive notifications via SMS text.
4. Click or tap the **SMS**, **Email**, or **Notification Popups** checkboxes to receive notifications by the desired method.
5. Click or tap the **Allow Personal Dashboard** checkbox to provide the ability to customize dashboards in the HC Standard® based on accessibility of information. Due to the amount of bandwidth used by multiple dashboards, there is a limit of six items that can be added. Exceptions can be made and access to unlimited dashboard items can be granted by clicking or tapping the **Allow Unlimited Dashboard Items** checkbox.
6. Click or tap the **Stay logged in** checkbox to allow the user to stay logged in even when the user has not performed any actions in a certain amount of time..

The screenshot shows the 'Add User | Profile' interface. At the top, there are tabs for 'Profile' (selected) and 'Groups'. On the right, there are 'Save' and 'Back' buttons. The form is divided into several sections:

- General:** Fields for Name*, User Name*, and Administrator (checkbox). The 'Administrator' checkbox is circled with a orange circle containing the number 1.
- Contact Information:** Fields for Email*, Email 2, and Email 3. Below these are fields for Phone #1, Phone #2, Phone #3, Cell Provider, Pager #1, Pager #2, and Pager Provider. The 'Cell Provider' dropdown for Phone #1 is circled with a orange circle containing the number 2.
- Notifications and Dashboard:** A section with checkboxes for Notify By Email (circled with a orange circle containing the number 4), Notify By SMS, Notification Popups, Allow Personal Dashboard (circled with a orange circle containing the number 5), Allow Unlimited Dashboard Items, and Stay logged in (checkbox). The 'Stay logged in' checkbox is circled with a orange circle containing the number 6.

FIGURE 4-5: User Profile - Additional Fields

Notification settings can be entered when a new account is created in Admin mode, but it can also be entered by the user when logged into HC Standard® using the **User Profile**.

The **Groups** tab of the tool allows the Admin to assign a user to a user group or multiple groups. These assignments can be made at any time, or when appropriate groups are created.

To assign a user to a user group(s), as shown in FIGURE 4-6:

1. Click or tap the **Groups** tab.
2. Click or tap the **Add Group** button. Select from the available groups, see "Selecting Items from an Available List" on page 8. These assignments can be made at a later time, if desired, or if the appropriate groups have not yet been created.



FIGURE 4-6: Add User - Groups

When done adding information to the profile of the **Add User** tool, exit the tool, as shown in FIGURE 4-7:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 4-7: Save and Back Buttons

4 - 1.2 Other User Action(s)

Other actions may be performed with users including deleting an account, resetting a password, and unlocking an account.

To perform any of the above actions on one or more users, as shown in FIGURE 4-8:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

USERS									<input type="button" value="Display"/>	Search here	<input type="button" value="Create New User"/>	<input checked="" type="checkbox"/> Actions
<input type="radio"/>	Name	User Name	Email	Administ...	Must Res...	Groups	Workspa...	Last Log...				
<input type="radio"/>	Training User	training1	training@ger911.com	<input checked="" type="radio"/>	<input type="radio"/>	4	5	5/7/15 12:51 P				
<input checked="" type="radio"/>	Training User	training2	ad@ad.com	<input type="radio"/>	<input checked="" type="radio"/>	3	1	4/10/15 10:09 A				

FIGURE 4-8: Users - Action Button

Select the desired action and follow the prompt, as shown in FIGURE 4-9:

1. **Delete** removes the account from the system.
2. **Reset Password** allows for a new password to be assigned to the account. The current password is not required to perform this action.
3. **Unlock Account** allows for the unlocking of an account that has been locked out due to multiple failed login attempts.

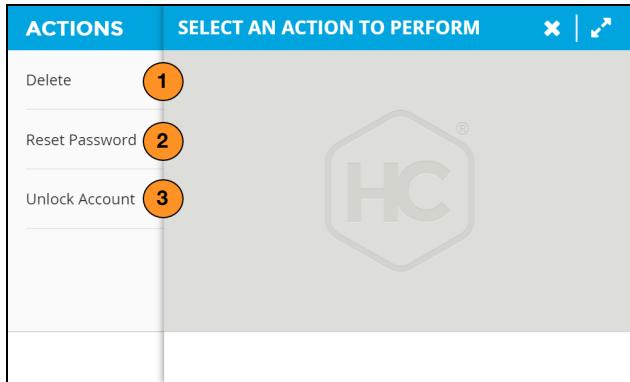


FIGURE 4-9: User Actions

4 - 2: Groups

To manage groups, as shown in FIGURE 4-10:

1. Click or tap on the **Users**, and **Permissions** icon.
2. Click or tap on the **Groups** icon under the **Manage My Users** section.

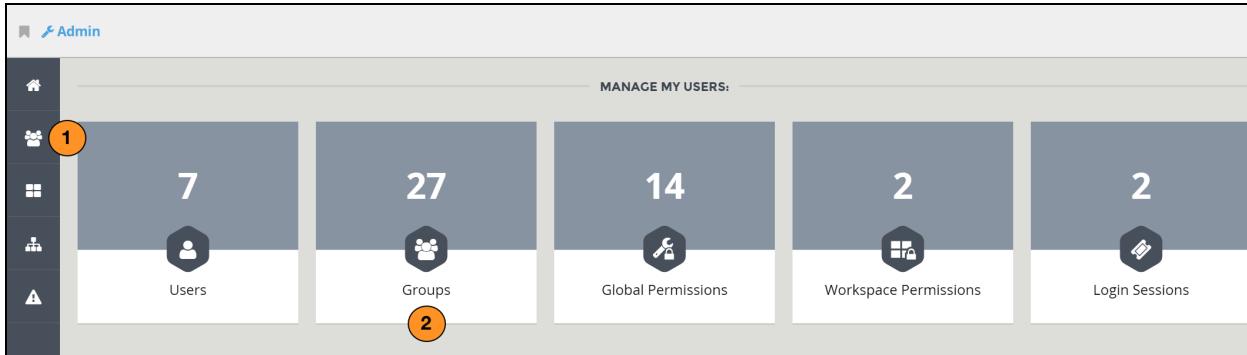


FIGURE 4-10: Groups

FIGURE 4-11 shows the main **Groups** page. On this page is a list of all existing user groups, and descriptions (if any) of those groups.

	Name	Description	Users	Member of	Workspaces	Organization	Last Modified
<input type="radio"/>	ADM Users		5	0	0	2	7/10/15 7:00 AM
<input type="radio"/>	Admins		10	1	0	5	7/10/15 7:00 AM
<input type="radio"/>	All App Users		7	0	0	2	7/10/15 7:00 AM
<input type="radio"/>	BDS Users		6	0	0	3	7/10/15 7:00 AM
<input type="radio"/>	Contact Tracing Users		0	0	0	2	7/10/15 7:01 AM
<input type="radio"/>	CT Users		0	0	0	1	7/10/15 7:01 AM
<input type="radio"/>	FI Users		5	0	1	3	7/10/15 7:00 AM
<input type="radio"/>	Field Interview Users		5	0	0	3	7/10/15 7:00 AM
<input type="radio"/>	H1N1		4	0	0	1	3/16/15 1:01 PM
<input type="radio"/>	Hospital A		1	0	0	3	7/8/15 12:13 PM
<input type="radio"/>	Hospital B		4	0	0	1	6/5/15 8:49 AM
<input type="radio"/>	ICS Users		7	0	0	3	7/10/15 7:00 AM
<input type="radio"/>	JamesGrant		0	0	0	1	5/26/15 4:12 PM
<input type="radio"/>	MA Users		5	0	0	2	7/10/15 7:01 AM
<input type="radio"/>	MAM Users		5	0	0	2	7/10/15 7:01 AM

TOTAL ITEMS: 38 SELECTED ITEMS: 0

FIGURE 4-11: User Groups Main Page

4 - 2.1 Creating New Groups

To create a group, as shown in FIGURE 4-12:

1. Click or tap on the **Create New Group** button.



FIGURE 4-12: Create Group Button

The **Add Group** tool will display with the **Details** tab already selected. FIGURE 4-13 is an example of creating a new group, entitled "H1N1 Doctors".

1. Enter a **Name** and **Description** for the new group on the **Details** page of the **Add Group** tool.
2. Click or tap the **Organizational** checkbox if this user group will be used for Sub-Admin use.

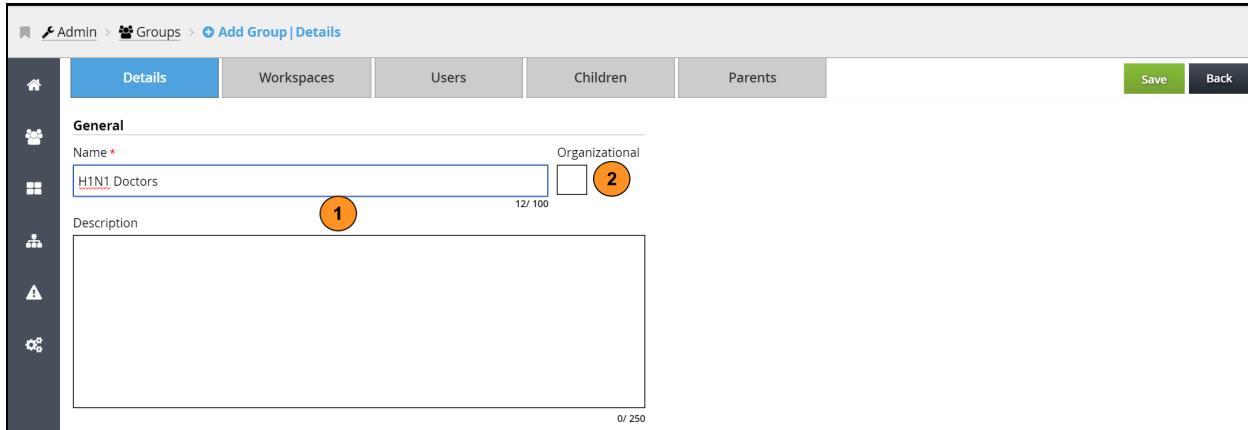


FIGURE 4-13: Add Group

The other tabs along the top of the screen include settings to assign **Users** to the group, to assign the group to **Workspaces** and to determine the group's relationship with other user groups. It is also possible to complete these actions at a later time.

4 - 2.2 Assigning Workspaces to Groups

Access to workspaces is granted exclusively through groups. To grant access from within the **Groups** tool, as shown in FIGURE 4-14:

1. Click or tap the **Workspaces** tab.
2. Click or tap the **Add Workspaces** button to see a list of all available workspaces in the system. To add or remove workspaces from the selected group, see "Selecting Items from an Available List" on page 8.



FIGURE 4-14: Add Workspaces Panel

After workspaces are placed in the group, each workspace must be assigned a permission set which specifies exactly what the members of this group will and will not be able to do within the workspace. After *clicking or tapping* the **Add Selected** button, a prompt requiring a permission set to be selected will appear, as shown in FIGURE 4-15. If the desired permission set has not yet been created, the Admin will first need to create the new permission set before assigning the user group to a workspace. For more information, see "Workspace Permissions" on page 24.

1. Select the permission set.
2. Click or tap **Yes** to confirm or **No** to cancel.

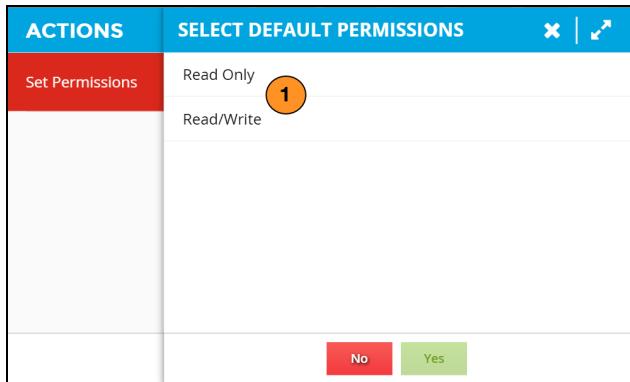


FIGURE 4-15: Set Permissions Action

4 - 2.3 Assigning Users to Groups

FIGURE 4-16 shows the **Users** tab selected from within the **Add New Group** tool. To assign one or more users to a group:

1. Click or tap the **Users** tab to add, edit, or remove users from the group. A list of all users currently assigned to that group will be shown.
2. Click or tap the **Add Users** button to bring up a list of all available users in the system. To add or remove users from the selected group, see "Selecting Items from an Available List" on page 8.

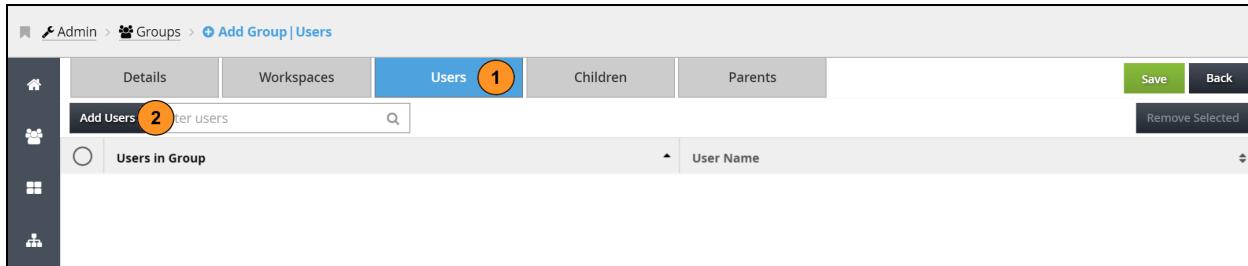


FIGURE 4-16: Add Users



Note: To search through all users and find a certain string of characters, enter the string in the search box in the left-hand corner of the screen.

4 - 2.4 Working with Members

User groups can be members of other user groups. In FIGURE 4-17, "GROUP C" is a member of "GROUP B", and "GROUP B" is a member of "GROUP A". For example, if Group A has access to a patient workspace, then Group B and Group C also have access to the patient workspace. If Group B has access to a Regional workspace, then only Group C will also have access not Group A.



FIGURE 4-17: Group Diagram

The next step in creating a user group is assigning groups as children to the user group. In the example shown in FIGURE 4-18, "Task Force 1" and "Task Force 2" have been added as children to the new user group. To add an existing user group (and all of its members) to the user group being added or edited:

1. Click or tap on the **Children** tab in either the **Add Group** or **Edit Group** tool.
2. Click or tap the **Add Groups** button. To add or remove **Child Groups** from the selected group, see "Selecting Items from an Available List" on page 8.

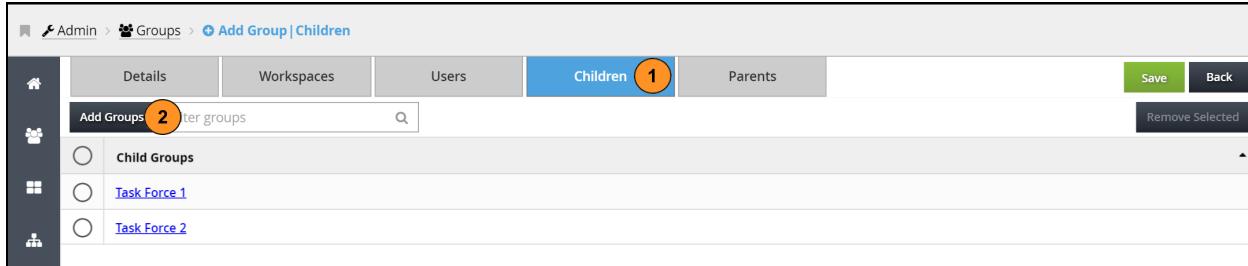


FIGURE 4-18: User Group Example

In the example shown in FIGURE 4-19, the new user group is made a parent of the "H1N1" user group. To add the user group to an already existing user group:

1. Click or tap the **Parents** tab.
2. Click or tap the **Add Groups** button to bring up a list of all **Available Groups** in the system. To add or remove **Parent Groups** from the selected group, see "Selecting Items from an Available List" on page 8.

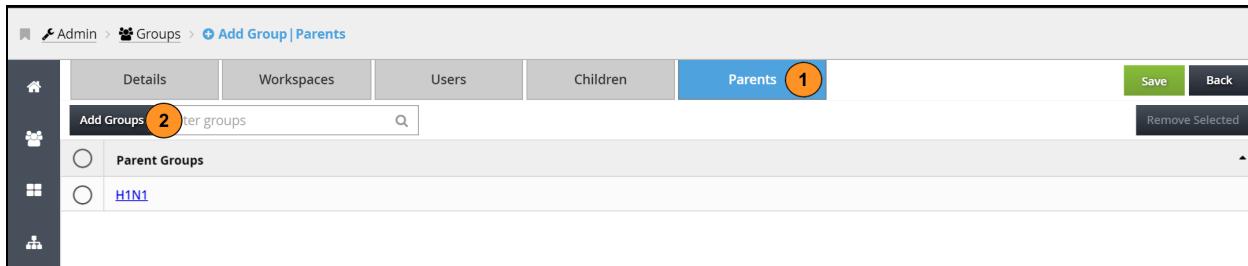


FIGURE 4-19: User Group Example

FIGURE 4-20 is an example of the relationship between the groups.

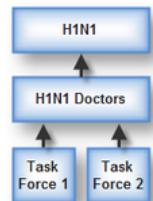


FIGURE 4-20: Example Group Diagram

To exit the group tool, as shown in FIGURE 4-21:

1. Click or tap the **Save** button to keep any changes.
- OR
2. Click or tap the **Back** button to abandon any changes and close the tool.

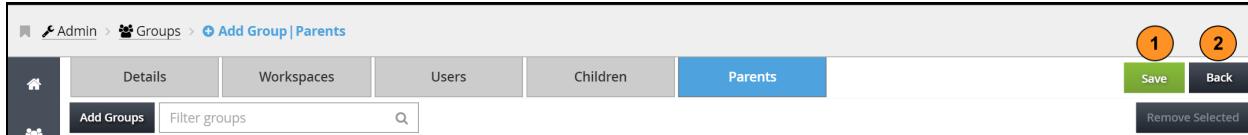


FIGURE 4-21: Save and Back Button

4 - 2.5 Other User Group Action(s)

Other actions may be performed with user groups including deleting groups, adding users, adding workspaces, adding groups, and adding to groups.

To perform any of the above actions on one or more user groups, as shown in FIGURE 4-22:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

GROUPS								
	Name	Description	Users	Member ...	Member of	Workspaces	Organizat...	Last Mod...
<input type="radio"/>	ADM Users		3	0	0	1	<input type="radio"/>	5/5/15 11:36 AM
<input checked="" type="radio"/>	1 mins		6	0	0	3	<input type="radio"/>	5/5/15 11:36 AM

FIGURE 4-22: User Group Actions button

Select the desired action and follow the prompt, as shown in FIGURE 4-23:

1. **Delete Group(s)** removes the group from the system entirely. (Note: this does not delete the users within the groups.)
2. **Add User** adds existing users within the system to the group or groups selected.
3. **Add Workspace** adds an existing workspace within the system to the group or groups selected. This workspace will be made available to all users within the group.
4. **Add Group** adds child groups to the selected group.
5. **Add to Group** adds the selected groups as children to another group.

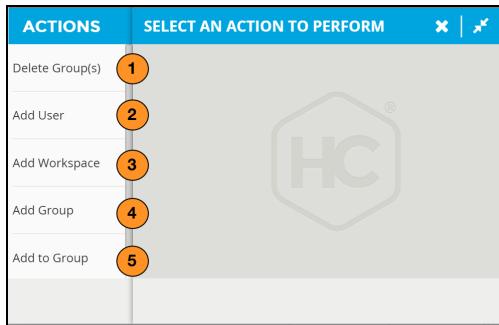


FIGURE 4-23: User Group Actions

4 - 3: Workspace Permissions

All data in HC Standard® is made available through workspaces. Matrices, charts, and other items are placed in a workspace. User groups are assigned to the workspace and given access to those items with one of the permission sets available in the system.

To manage workspace permissions, as shown in FIGURE 4-24:

1. Click or tap on the **Users and Permissions** icon.
2. Click or tap on the **Workspace Permissions** icon under the **Manage My Users** section.

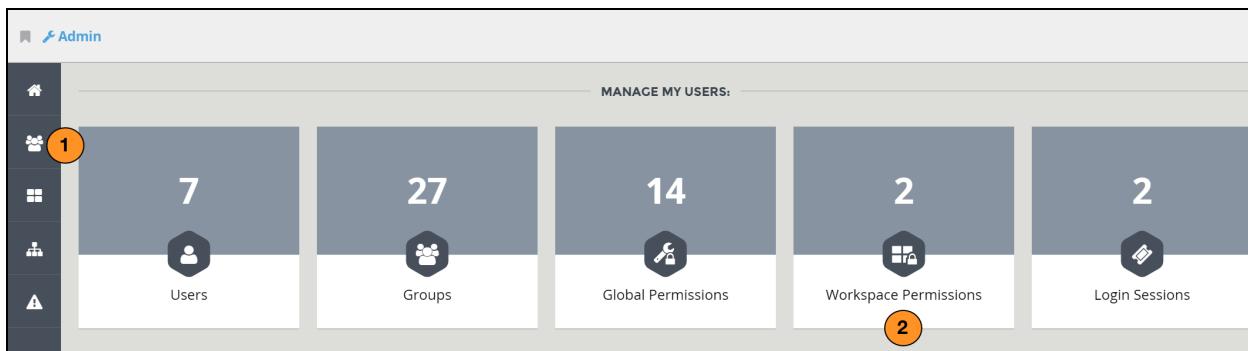


FIGURE 4-24: Workspace Permissions

FIGURE 4-25 shows the main **Permissions** page. This page displays all existing permission sets, along with the description provided for each, if there is one.

WORKSPACE PERMISSIONS				
	Name	Description	Functions	Last Modified
<input type="radio"/>	Read Only	Read Only	11	9/23/14 4:16 PM
<input type="radio"/>	Read/Write	Read/Write	45	9/23/14 4:16 PM

TOTAL ITEMS: 2 SELECTED ITEMS: 0

FIGURE 4-25: Workspace Permissions List

The default workspace permissions included in every HC Standard® installation include:

- **Read Only** - group of permissions that allow a user to only view workspace items, but not modify them.
- **Read/Write** - group of permissions that allow a user to not only view workspace items, but also modify them.

4 - 3.1 Creating a Permission Set

To create a new permission set, as shown in FIGURE 4-26:

1. Click or tap the **Create New Permission Set** button.



FIGURE 4-26: Create New Permission Set Button

The **Create New Permission Set** tool will display with the **Details** tab already selected, as shown in FIGURE 4-27.

1. Enter a **Name** and add a **Description**, if desired.
2. Click or tap the **Functions** tab.

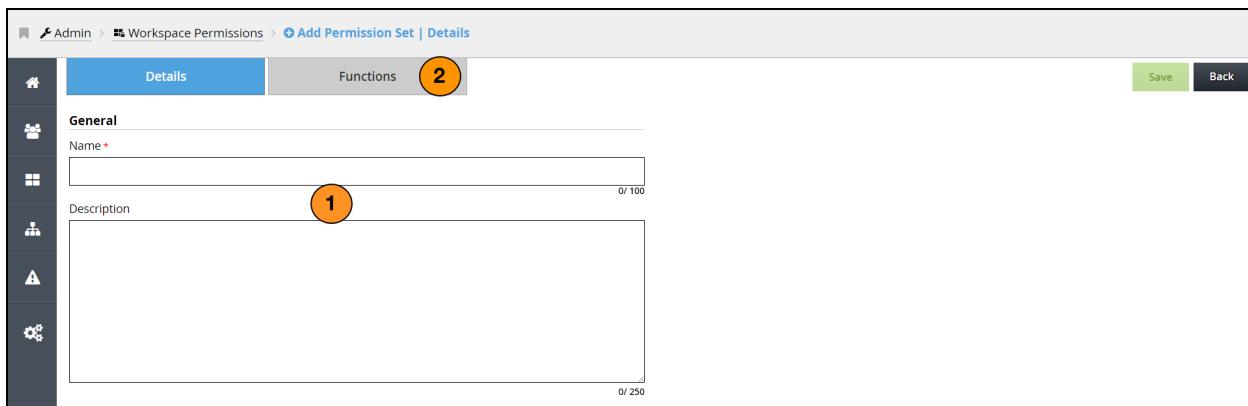


FIGURE 4-27: Create New Permission Set - Details

In FIGURE 4-28, the **View Chart** and **View Matrices** functions have been added to the **Functions** list. This means users assigned to this permission set will only be able to view charts and have read-only access to matrices in the workspace.

1. Click or tap the **Add Functions** button. Select functions from the available groups. For more information, see "Selecting Items from an Available List" on page 8.

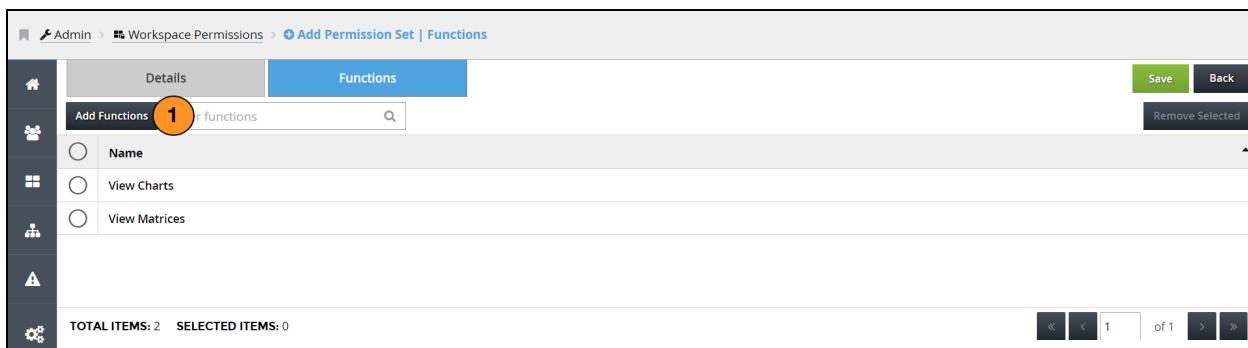


FIGURE 4-28: Create A Permission Set - Functions

To exit the workspace permissions tool, as shown in FIGURE 4-29:

1. Click or tap the **Save** button to keep any changes.
- OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 4-29: Save and Back buttons

4 - 3.2 Other Workspace Permission Set Action(s)

One other action, delete, may be performed with workspace permission sets.

To perform this action on a permission set, as shown in FIGURE 4-30:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

WORKSPACE PERMISSIONS					Display All	Display ▾	Search here	Q	+ Create New Permission Set	<input checked="" type="checkbox"/> Actions
<input type="radio"/>	Name	▲	Description	▼	Functions	▼	Last Modified	▼		
<input checked="" type="radio"/>	1 Read Only		Read Only		11		9/23/14 12:16 PM			
<input type="radio"/>	Read/Write		Read/Write		45		9/23/14 12:16 PM			

FIGURE 4-30: Workspace Permission - Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 4-31.

1. **Delete** removes the permission set from the system.

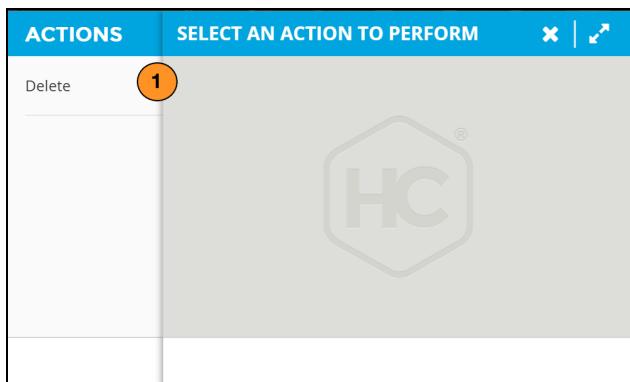


FIGURE 4-31: Workspace Permission Set - Other Actions

4 - 4: Global Permissions

System-wide permissions, such as the ability to run the mobile patient tracking application or use Incident Commander, are controlled through Global Permissions. Another use for global permissions is to delegate user and user group administrative functions to Sub-Admins.

To manage global permissions, as shown in FIGURE 4-32:

1. Click or tap on the **Users and Permissions** icon.
2. Click or tap on the **Global Permissions** icon under the **Manage My Users** section.

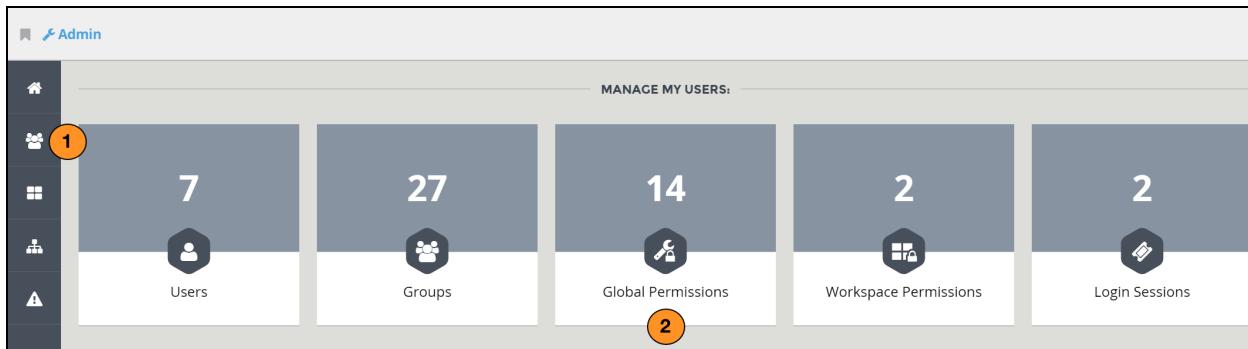


FIGURE 4-32: Global Permissions

The default global permissions included in every installation of HC Standard® include:

- **Run ADM** - permission to run the admin client
- **Run All Apps** - permission to run all clients
- **Run PTS** - permission to run the patient tracking application
- **Run Web** - permission to run PTS Web
- **Sub-Admin Creation** - permission to create a Sub-Admin
- **User Management** - permission to manage users in the system

FIGURE 4-33 shows the main **Global Permissions** page. This page displays all existing global permission sets, along with the description provided for each.

GLOBAL PERMISSIONS				
	Name	Description	Functions	Last Modified
<input type="checkbox"/>	Run ADM	Permission to run the Admin Client	1	3/12/15 11:16 AM
<input type="checkbox"/>	Run All Apps	Permission to run all Clients	13	3/12/15 11:11 AM
<input type="checkbox"/>	Run BDS	Permission to run the Biodosimetry app	1	3/12/15 11:16 AM
<input type="checkbox"/>	Run FI	Permission to run the Field Interview app	1	3/12/15 11:16 AM
<input type="checkbox"/>	Run ICS	Permission to run the ICS app	1	3/12/15 11:12 AM

TOTAL ITEMS: 13 SELECTED ITEMS: 0

FIGURE 4-33: Global Permissions List

4 - 4.1 Creating a Permission Set

To create a new permission set, as shown in FIGURE 4-34:

1. Click or tap the **Create New Permission Set** button.



FIGURE 4-34: Create New Permission Set Button

The **Create New Permission Set** tool will display with the **Details** tab already selected, as shown in FIGURE 4-35.

1. Enter a **Name** and a **Description**, if desired.
2. Click or tap the **Functions** tab.

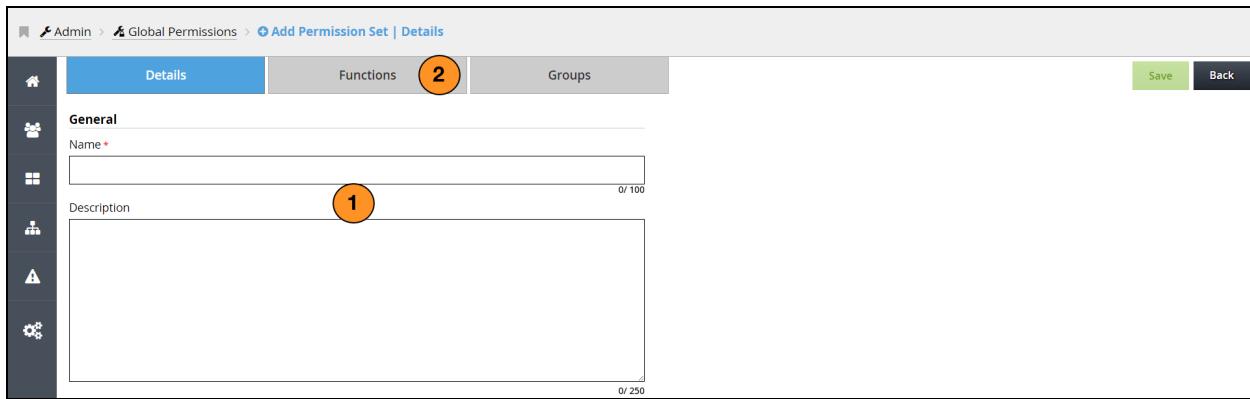


FIGURE 4-35: Create New Permission Set - Details

In FIGURE 4-36, functions related to managing users have been added to the **Functions** list. This means a Sub-Admin assigned to this global permission set will only be able to create, delete, assign, and logout users.

1. Click or tap the **Add Functions** button. Select functions from the available groups. For more information, see "Selecting Items from an Available List" on page 8.
2. Click or tap the **Groups** tab.

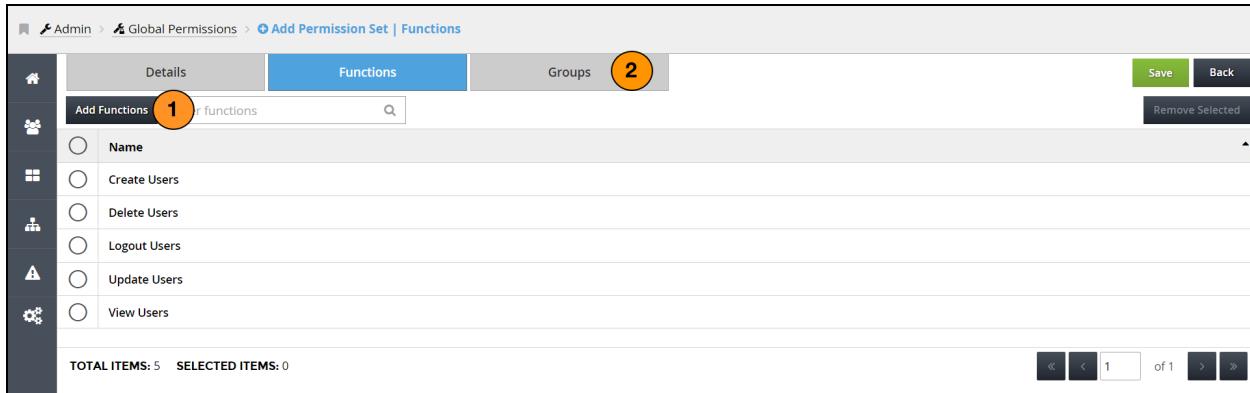


FIGURE 4-36: Create A Permission Set - Functions

To add the permission set to a group, as shown in FIGURE 4-37.

1. Click or tap the **Add Groups** button to apply the permission set to a user group. Select user groups from the available groups. For more information, see "Selecting Items from an Available List" on page 8.

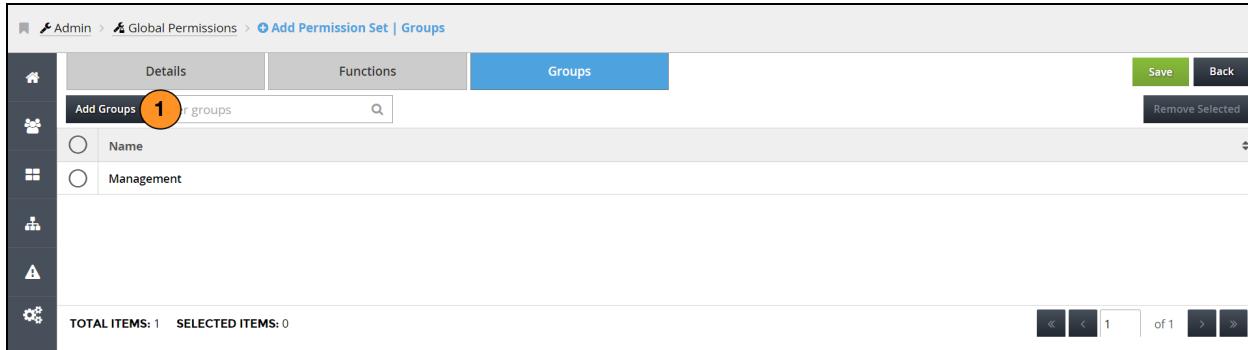


FIGURE 4-37: Create Permission Set - Groups

To exit the global permissions tool, as shown in FIGURE 4-38:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 4-38: Save and Back buttons

4 - 4.2 Other Permission Set Action(s)

One other action, delete, may be performed with global permission sets.

To perform this action on a global permission set, as shown in FIGURE 4-39:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

GLOBAL PERMISSIONS				<input type="button" value="Display"/>	<input type="text" value="Search here"/>	<input type="button" value="Create New Permission Set"/>	<input checked="" type="checkbox"/> Actions
<input type="radio"/>	Name	Description	Functions			Last Modified	
<input type="radio"/>	Run ADM	Permission to run the Admin Client	1			3/12/15 7:16 AM	
<input checked="" type="radio"/>	1 in All Apps	Permission to run all Clients	13			3/12/15 7:11 AM	

FIGURE 4-39: Actions Button

Select the desired **action** and follow the prompt, as shown in FIGURE 4-40.

1. **Delete** removes the permission set from the system.



FIGURE 4-40: Permission Set - Other Actions

4 - 5: Login Sessions

The login sessions tool displays all users currently logged in to the system.

To manage login sessions, as shown in FIGURE 4-41:

1. Click or tap on the **Users and Permissions** icon.
2. Click or tap on the **Login Sessions** icon under the **Manage My Users** section.

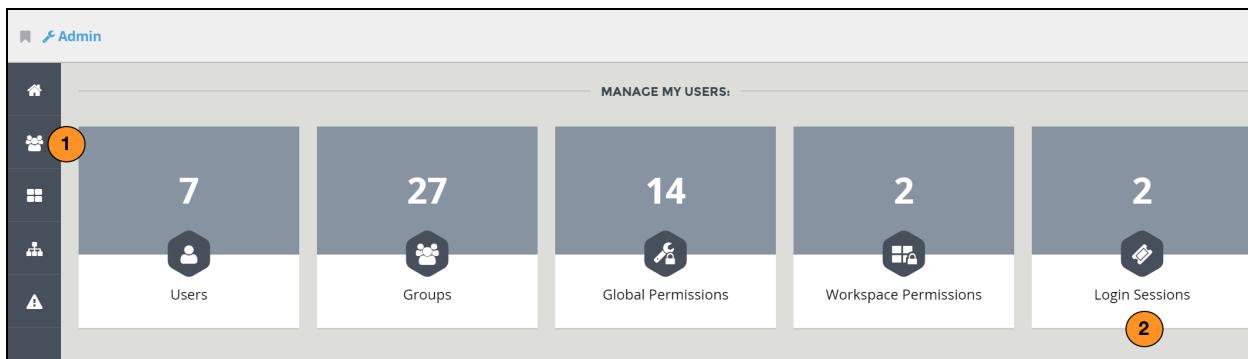


FIGURE 4-41: Login Sessions

FIGURE 4-42 below shows the main **Login Sessions** page. This page displays current user sessions, along with the Session ID, Client, Login Time, Ping Time, and Time Zone.

LOGIN SESSIONS									<input type="button" value="Display"/>	<input type="text" value="Search here"/>	<input type="button" value="Actions"/>
	User ID	Name	Session ID	Client	Login Time	Ping Tim...	Time Zone				
<input type="radio"/>	3	Training User	54743adf-5c2c-4f26-81b3-69c2...	HCS	5/5/15 4:22 PM	5/5/15 4:41 PM	Eastern Standard Time				

FIGURE 4-42: Login Sessions list

4 - 5.1 Other Login Sessions Action(s)

One other action, end session, may be performed with login sessions.

To perform this action on a login session, as shown in FIGURE 4-43.

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

LOGIN SESSIONS									<input type="button" value="Display"/>	<input type="text" value="Search here"/>	<input type="button" value="Actions"/>
	User ID	Name	Session ID	Client	Login Time	Ping Tim...	Time Zone				
<input checked="" type="radio"/>	1	Training User	5c3b1bc8-7425-4409-a4fb-0cc...	HCS	5/7/15 9:06 AM	5/7/15 12:55 PM	Eastern Standard Time				
<input type="radio"/>	3	Training User	2fb75122-53aa-4154-9e0f-9cd...	HCS	5/7/15 9:18 AM	5/7/15 12:47 PM	Eastern Standard Time				

FIGURE 4-43: Actions Button

Select the desired **action** and follow the prompt, as shown in FIGURE 4-44.

1. **End Session** immediately logs out the selected user.

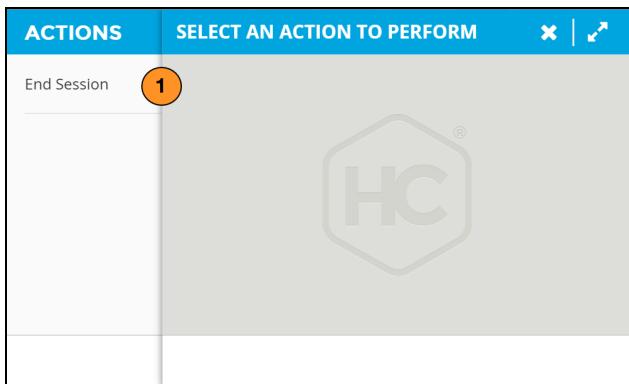


FIGURE 4-44: Logon Sessions - Other Actions

4 - 6: Access Rules

Access Rules are used to filter particular entities to certain users when a Request For Input notification is sent.

To manage access rules as shown in FIGURE 4-45:

1. Click or tap on the **Users and Permissions** icon.
2. Click or tap on the **Access Rules** icon under the **Manage My Users** section.

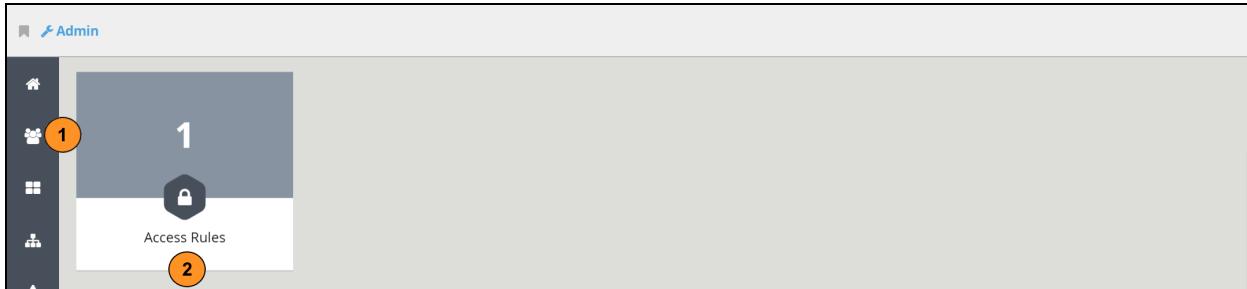


FIGURE 4-45: Access Rules

FIGURE 4-46 below shows the main **Access Rules** page. This page displays existing access rules, matrices used, and user group access levels.

ACCESS RULES						<input type="button" value="Display"/>	Search here	<input type="button" value="Create New Access Rule"/>	<input type="button" value="Actions"/>
<input type="radio"/>	Name	<input type="button" value="Matrix Name"/>		User Groups	<input type="button" value="Access Level"/>		Last Modified		
<input type="radio"/>	Patient Information / Admins	Patient Information		Admins	Read Update		4/19/16 3:03 PM		

FIGURE 4-46: Login Sessions list

4 - 6.1 Creating an Access Rule

To create a new access rule, as shown in FIGURE 4-47:

1. Click or tap the **Create New Access Rule** button.

ACCESS RULES						<input type="button" value="Display"/>	Search here	<input type="button" value="Create New Access Rule"/>	<input type="button" value="Actions"/>
<input type="radio"/>	Name	<input type="button" value="Matrix Name"/>		User Groups	<input type="button" value="Access Level"/>		Last Modified		

FIGURE 4-47: Create New Access Rule

The **Create New Access Rule** tool will display with the **Parent Matrix** tab already selected, as shown in FIGURE 4-6.

1. Click or tap the **Select Parent Matrix** button. Select desired matrix to be used only with this access rule. For more information, see "Selecting Items from an Available List" on page 8.
2. Click or tap the **User Groups** tab.

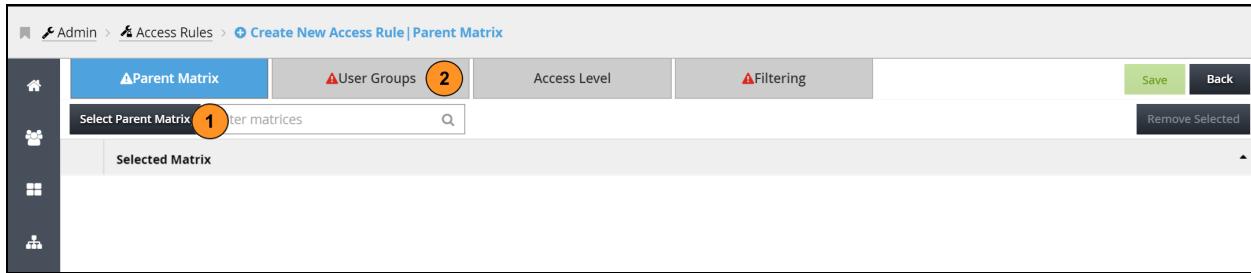


FIGURE 4-48: Access Rules - Parent Matrix

Assign user groups to this access rule, as shown in FIGURE 4-49:

1. Click or tap **Select User Group** button to assign the access rule to a particular user group. For more information, see "Selecting Items from an Available List" on page 8.
2. Click or tap **Access Level** tab.

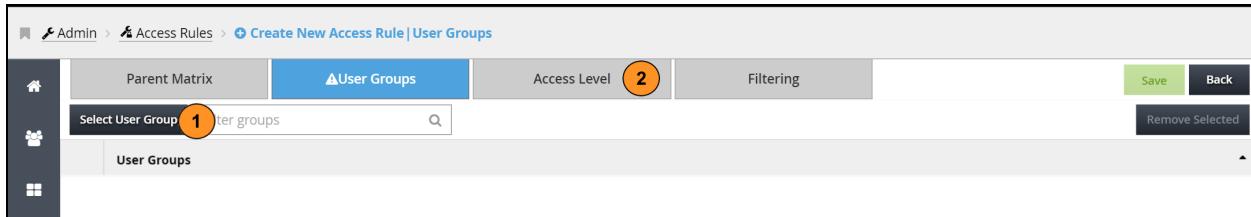


FIGURE 4-49: Access Rules - User Groups

Set the access level, as shown in FIGURE 4-50:

1. Click or tap the desired function check box.
2. Click or tap **Filtering** tab.

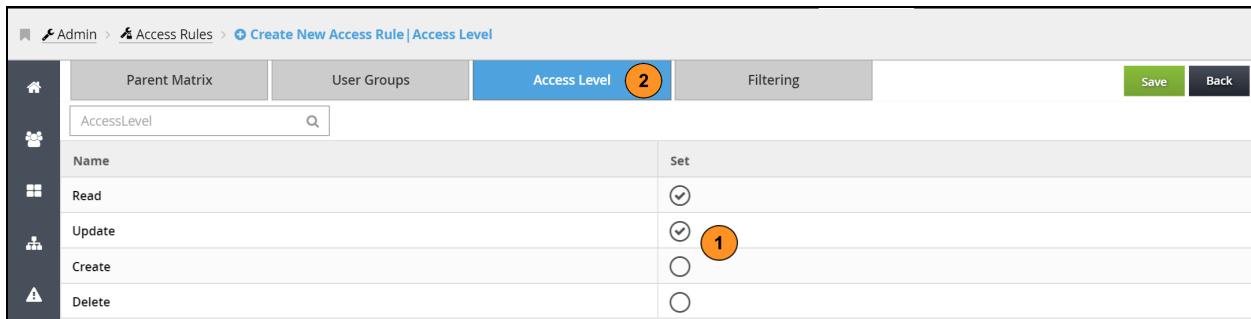


FIGURE 4-50: Access Rules - Access Level

Set a filter that would identify the entities this access rule will access, as shown in FIGURE 4-51:

1. Click or tap **Add Measures** button. Add filtering options if necessary. For more information, see "Selecting Items from an Available List" on page 8.

Each item in the list consists of the **measure**, an **operator** to compare by, and some set of **values**. The operator and values will vary depending on the kind of data the measure contains.

2. Once a measure has been added to the list, click or tap the **operator** drop-down to select the filter.
3. Enter a **value** for the filter.
4. Click or tap **Save** to save the access rule.
5. Click or tap **Back** to cancel the access rule.

Measure	Operator	Include Empty	Values	Values
Gender	Is One Of		1 Item(s)	

FIGURE 4-51: Access Rules - Filtering

Use of an access rule is performed by sending a Notification with Request for Input. For more information, see "Notifications" on page 108.

4 - 6.2 Other Access Rule Action(s)

One other action, end session, may be performed with login sessions.

To perform this action on a login session, as shown in FIGURE 4-52.

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

Name	Matrix Name	User Groups	Access Level	Last Modified
Patient Information / Admins	Patient Information	Admins	Read Update	4/19/16 3:03 PM

FIGURE 4-52: Actions Button

Select the desired **action** and follow the prompt, as shown in 4 - 6.

1. **Delete** removes the access rule from the system.

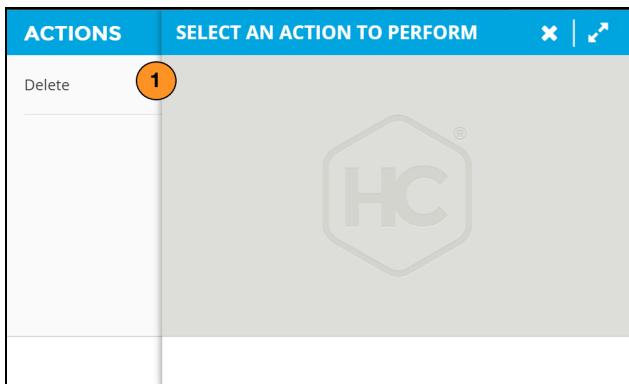


FIGURE 4-53: Access Rulest - Other Actions

4 - 7: Sub-Admins

4 - 7.1 Sub-Admin Overview

Depending on the size of an organization and scale of the system, Admin responsibilities may need to be divided up among certain users. When a user is delegated to perform some, but not all, Admin functions in the system, the user is considered a sub-administrator, or **Sub-Admin**.

For example, an organization could have five separate regions. Within each region there could be ten hospitals. Inside each hospital, there could be 20 users. That works out to be 1000 users. An Admin may delegate management of users to multiple Sub-Admins.

In this case, Sub-Admins can be created to manage each region and hospital. The hospital Sub-Admins only have permission to manage the users in their facility, and the regional Sub-Admins only have permission to manage the users in their region.

There are a few steps needed to create a properly configured sub-admin hierarchy. This uses a few of the tools covered previously in this chapter. Each step is explained in the sections that follow.

4 - 7.2 Creating a Sub-Admin User Group

The first user group necessary for Sub-Admin delegation is the overall Sub-Admin user group. Users assigned to this group will receive special global permissions that enable them to manage certain users and user groups.



Note: Note that the overall Sub-Admin user group only needs to be created once. This user group may already exist in the system.

To access User Groups, as shown in FIGURE 4-54:

1. Click or tap on the **Users and Permissions** icon.
2. Click or tap on the **Groups** icon under the **Manage My Users** section.

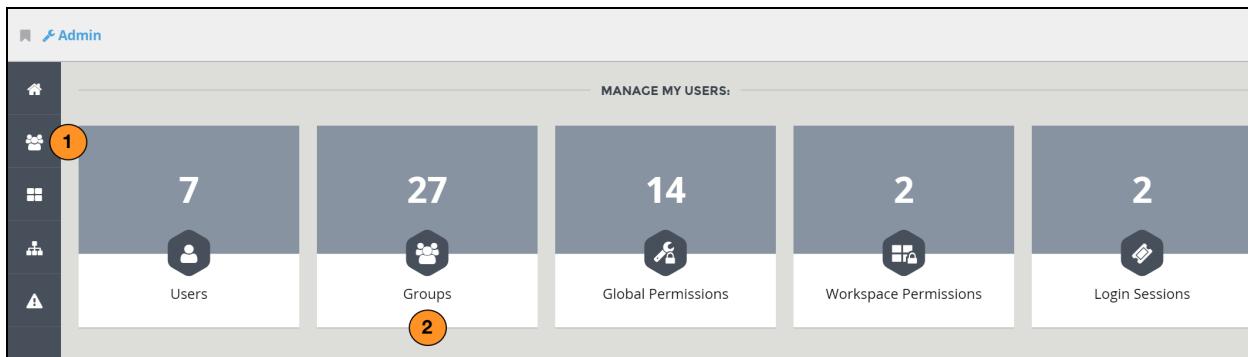


FIGURE 4-54: Groups

To create a new Sub-Admin User Group, as shown in FIGURE 4-55:

1. Click or tap on the **Create New Group** button.



FIGURE 4-55: Create Group Button

The **Add Group** tool will display with the **Details** tab already selected, as shown in FIGURE 4-56.

1. Enter a **Name** and **Description** for the new Sub-Admin group on the **Details** page of the **Add Group** tool.
2. Leave **Organizational** unchecked.

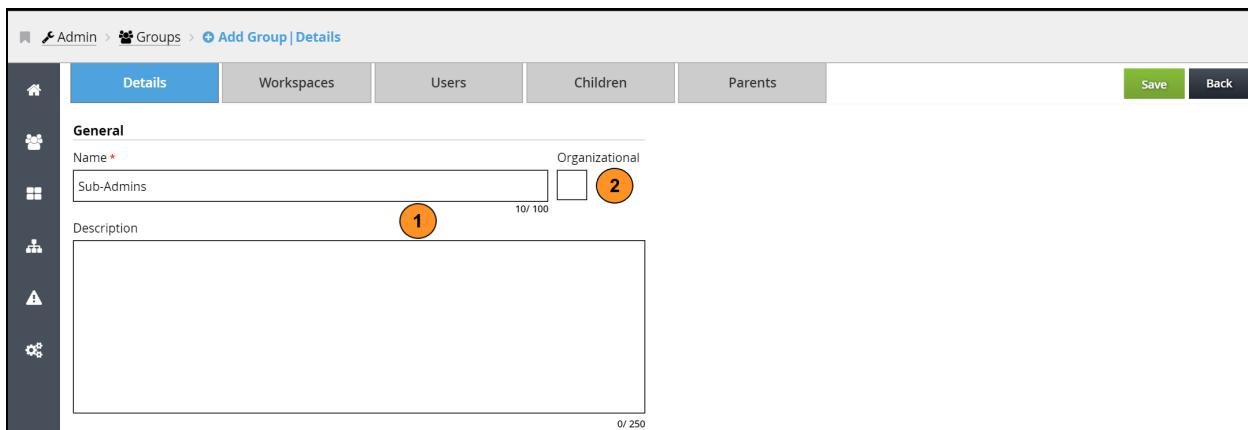


FIGURE 4-56: Add Group

The next step in the process of creating a Sub-Admin group is to add the users who will become Sub-Admins. To add users to the group, as shown in FIGURE 4-57:

1. Click or tap the **Users** tab to add, edit, or remove users from the group. A list of all users currently assigned to that group will be shown.
2. Click or tap the **Add Users** button to bring up a list of all available users in the system. To add or remove users from the selected group, see "Selecting Items from an Available List" on page 8.
3. When done adding users to the group, click or tap the **Save** button to keep changes.

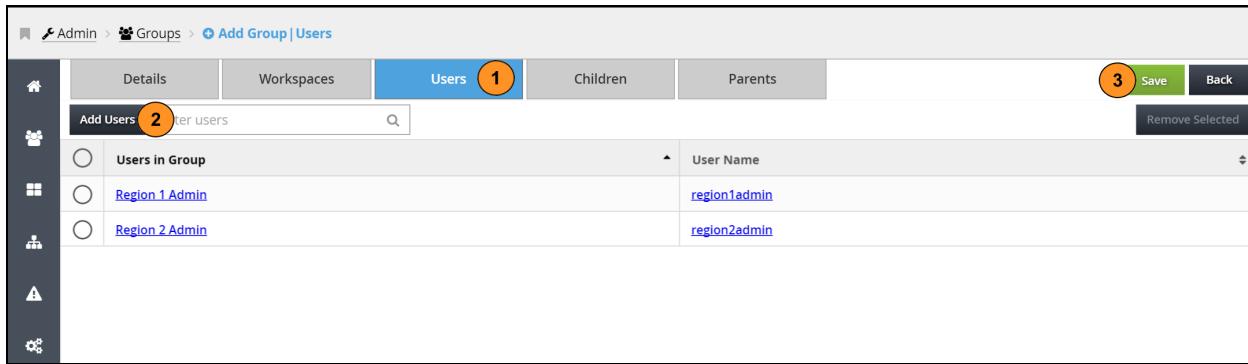


FIGURE 4-57: Add Users to Sub-Admin group

4 - 7.3 Creating a Sub-Admin Global Permission Set

A Global Permission set needs to be created in order to group the various sub-admin functions together. In the example below, the goal for Sub-Admins is to only manage users within their respective region.



Note: The Sub-Admin Global Permission Set only needs to be created once. This Global Permission Set may already exist in the system.

To access Global Permission Sets, as shown in FIGURE 4-58:

1. Click or tap on the **Users and Permissions** icon.
2. Click or tap on the **Global Permissions** icon under the **Manage My Users** section.

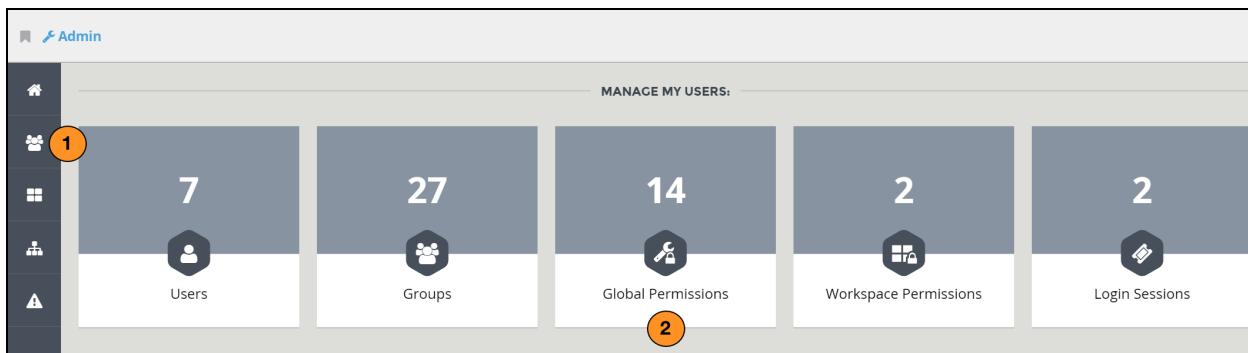


FIGURE 4-58: Global Permissions

To create a Sub-Admin Global Permission Set, as shown in FIGURE 4-59:

1. Click or tap the **Create New Permission Set** button.



FIGURE 4-59: Create New Permission Set Button

The **Create New Permission Set** tool will display with the **Details** tab already selected, as shown in FIGURE 4-60.

1. Enter a **Name** and add a **Description**, if desired.
2. Click or tap the **Functions** tab.

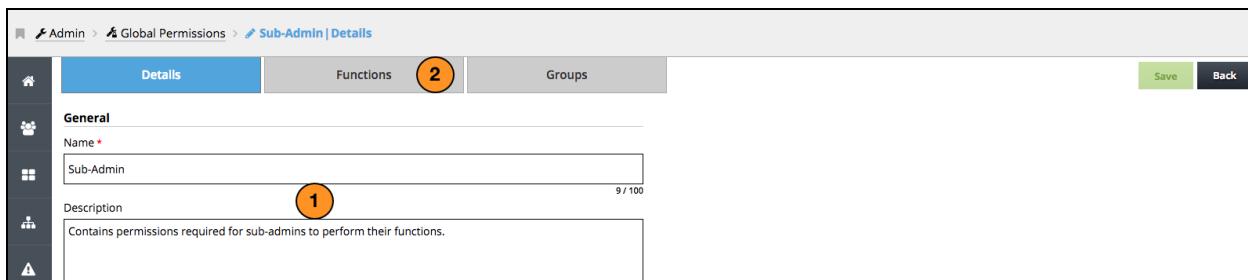


FIGURE 4-60: Create New Permission Set - Details

The next step in creating a Sub-Admin Global Permission Set is to add only the functions needed for Sub-Admins. In this example, a Sub-Admin assigned to this permission set will only be able to create, delete, assign, and logout users. To add functions to the group, as shown in FIGURE 4-61:

1. Click or tap the **Add Functions** button. Select functions from the available groups. For more information, see "Selecting Items from an Available List" on page 8.
2. For this example, only the following functions should be added to the group:
 - Create User Groups
 - Create Users
 - Delete User Groups
 - Delete Users
 - Logout Users
 - Reset User Passwords
 - Unlock User Accounts
 - Update User Groups
 - Update Users
 - View User Groups
 - View Users
3. Click or tap the **Groups** tab.

The screenshot shows a user interface for managing global permissions. The top navigation bar includes 'Admin', 'Global Permissions', and 'Sub-Admin | Functions'. The main content area has three tabs: 'Details', 'Functions' (which is selected and highlighted in blue), and 'Groups' (which is also highlighted with an orange circle labeled '3'). Below the tabs is a search bar with placeholder text 'Search functions' and a magnifying glass icon. A large list of functions is displayed, each preceded by a radio button. The functions listed are: Name, Create User Groups, Create Users, Delete User Groups, Delete Users, Logout Users (which is highlighted with an orange circle labeled '2'), Reset User Passwords, Unlock User Accounts, Update User Groups, Update Users, View User Groups, and View Users. At the bottom left, it says 'TOTAL ITEMS: 11 SELECTED ITEMS: 0'. At the bottom right, there are navigation buttons for page navigation.

FIGURE 4-61: Create A Permission Set - Functions

The last step for creating a Sub-Admin Global Permission set is to add the **Sub-Admins** user group created earlier to the permission set.

To add the group to the permission set, as shown in FIGURE 4-62

1. Click or tap the **Add Groups** button to apply the permission set to a user group. Select the **Sub Admin** user group from the available groups. For more information, see "Selecting Items from an Available List" on page 8.
2. When done adding the **Sub-Admin** user group to the permission set, click or tap the **Save** button to keep changes.

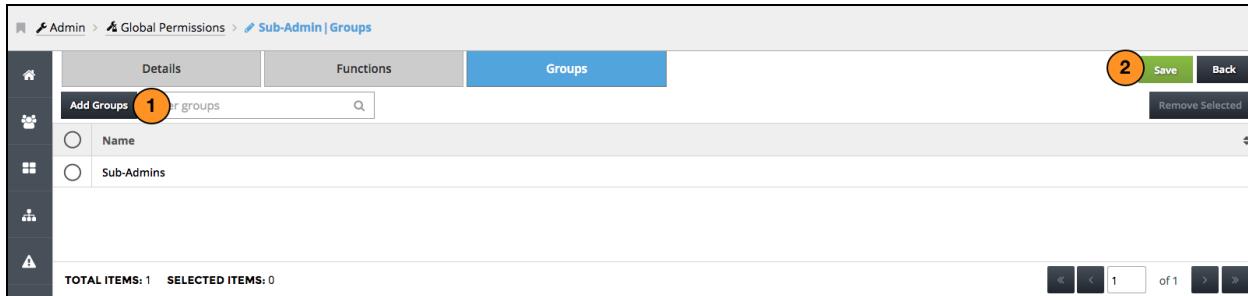


FIGURE 4-62: Add Sub-Admin user group to permission set

4 - 7.4 Creating an Organizational Hierarchy

Once Sub-Admins have been established, it is necessary to create a hierarchy of user groups that each Sub-Admin will manage. In the example below, an Admin is creating a Region 1 hierarchy for the Region 1 Sub-Admin. In this group, there are two facilities. An Admin will need to create a unique organizational group for each level and item in the hierarchy.

Access the **Add Group** tool from the **Groups** main page to create an Organizational user group.

The **Add Group** tool will display with the **Details** tab already selected, as shown in FIGURE 4-63.

1. Enter a **Name** and **Description** for the new organizational group on the **Details** page of the **Add Group** tool.
2. Check the **Organizational** checkbox.

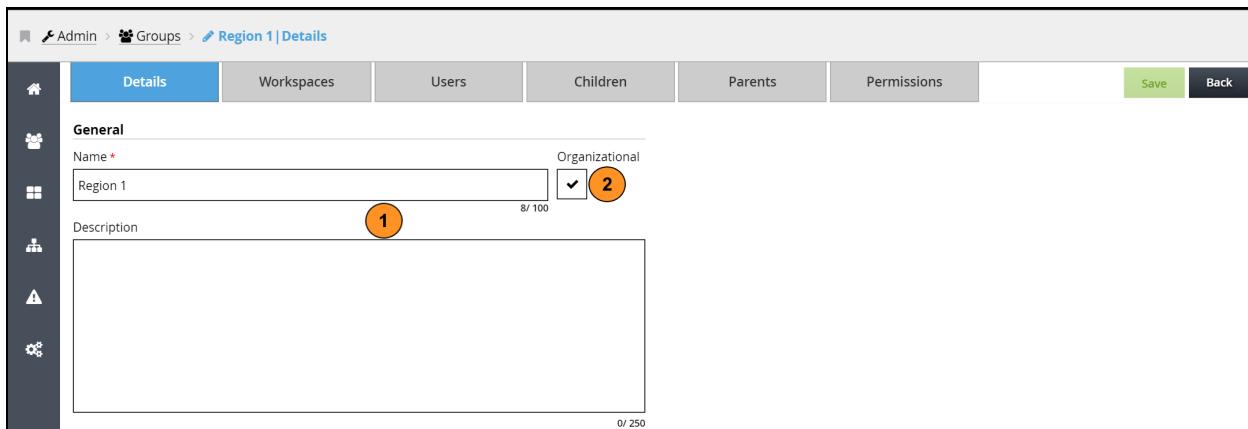


FIGURE 4-63: Add Group - Details

The next step in working with the Organizational Group is to associate a Sub-Admin who will manage this group of users. To add users to the group, as shown in FIGURE 4-64:

1. Click or tap the **Users** tab to add, edit, or remove users from the group. A list of all users currently assigned to that group will be shown.
2. Click or tap the **Add Users** button to bring up a list of all available users in the system. To add or remove users from the selected group, see "Selecting Items from an Available List" on page 8.



FIGURE 4-64: Add Group - Users

The last step necessary is to associate the user groups that the Sub-Admin can manage, as shown in FIGURE 4-65.

1. Click or tap on the **Children** tab in either the **Add Group** or **Edit Group** tool.
2. Click or tap the **Add Groups** button. To add or remove member groups from the selected group, see "Selecting Items from an Available List" on page 8.
3. Click or tap **Save** to save the group.

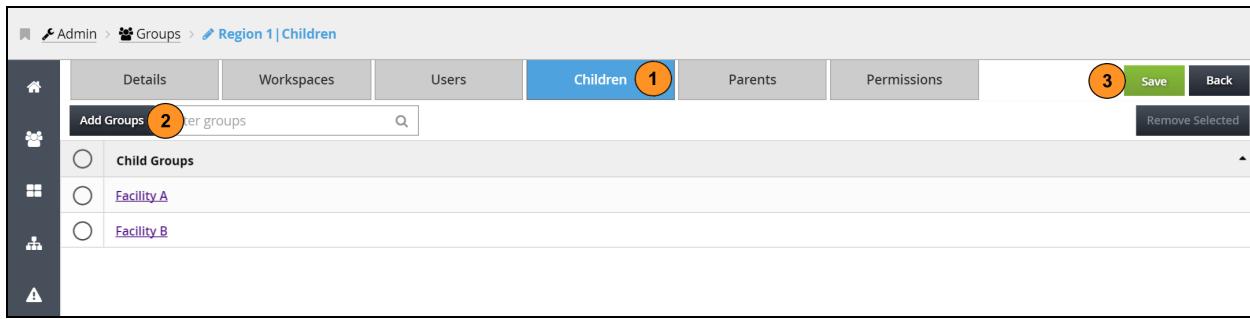


FIGURE 4-65: Add Group - Member Groups

4 - 7.5 What Sub-Admins See

When Sub-Admins access Admin mode, only certain tools are available. Following the example, these Sub-Admins will only access User management tools, as shown in FIGURE 4-66.

1. The **Users and Permissions** icon.
2. **Users** - to manage users in the Sub-Admin's Organizational group.
3. **Groups** - to manage user groups in the Sub-Admin's Organizational group.

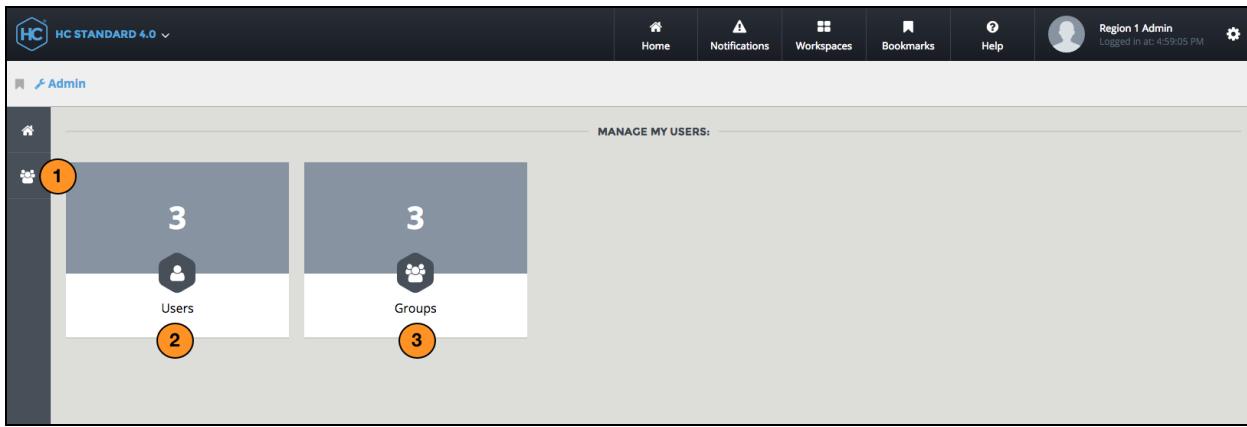


FIGURE 4-66: Sub-Admin Tools

Chapter 5 - Entities

In an HC Standard® **Matrix**, or table, the rows represent entities and the columns represent measures. **Matrices** can be managed using the tools found in the **Entities** category. FIGURE 5-1 shows the **Entities** category.

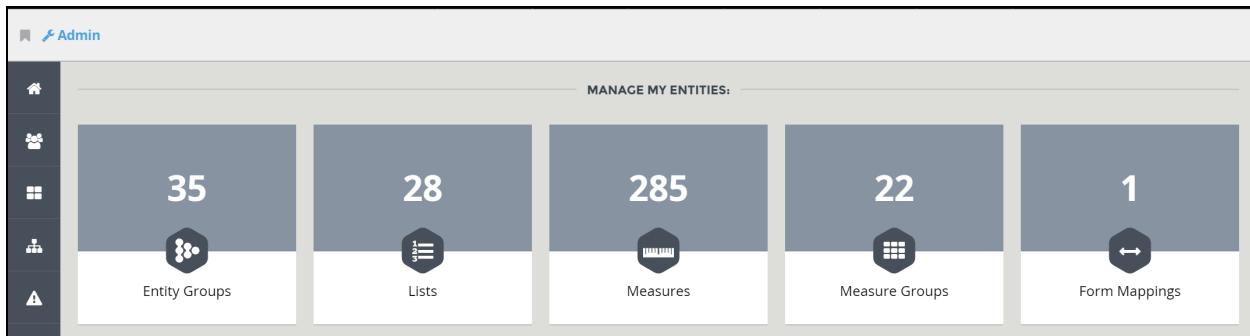


FIGURE 5-1: Entities

HC Standard® provides the ability to track and manage a wide range of information. Examples include a building, a hospital, a person, an incident or even a piece of equipment. Regardless of what is being tracked and managed, all of these things are called **entities**. An **entity** is a noun - person, place, or thing that needs to be tracked (e.g. patients). Each entity has certain attributes and can be grouped together with other entities.

FIGURE 5-2 shows a matrix with patient entities.

1. Each patient listed in the **Patient ID** column is an entity.

The screenshot shows a matrix titled 'EVENT PATIENTS'. The columns are: Patient ID, Address, Age, Allergies, Amputati..., Arrival Ti..., Bleeding ..., Blunt Tra..., Burn, and Triage St... . The rows list various patients with their details and status. A green 'DATA SYNC IS ONLINE' icon is in the top right. The table includes a toolbar with Bulk actions, Sort and Filter, Display, Import/Export, Add Entity, Create SubMatrix, and Tools.

EVENT PATIENTS											
		Patient ID	Address	Age	Allergies	Amputati...	Arrival Ti...	Bleeding ...	Blunt Tra...	Burn	Triage St...
		Patient #4986	157 Penn A...	33.00		(✓)	02/12/2010 7...	(✓)	(○)	(✓)	Minor
		Patient #4983	123 Main St.	79.00		(○)	02/12/2010 7...	(✓)	(○)	(✓)	Deceased
		Patient #4972	666 Hollywo...	29.00		(○)	02/12/2010 7...	(✓)	(○)	(✓)	Deceased
		Patient #4967	79 Central A...	47.00		(✓)	02/12/2010 7...	(✓)	(○)	(○)	Minor
		Patient #4951	1457 Penn A...	76.00		(✓)	02/12/2010 7...	(○)	(✓)	(○)	Deceased
		Patient #4948	1480 Washin...	78.00		(✓)	02/12/2010 7...	(○)	(✓)	(○)	Delayed
		Patient #4943	789 Fifth Ave.	99.00		(✓)	02/12/2010 7...	(✓)	(✓)	(○)	Delayed
		Patient #4930	789 Fifth Ave.	84.00		(○)	02/12/2010 7...	(✓)	(○)	(✓)	Deceased
		Patient #4921	789 Fifth Ave.	67.00		(○)	02/12/2010 7...	(○)	(○)	(○)	Minor
		Patient #4912	789 Fifth Ave.	96.00		(○)	02/12/2010 7...	(○)	(○)	(✓)	
		Patient #4893	79 Central A...	66.00		(✓)	02/12/2010 7...	(○)	(✓)	(○)	
		Patient #4886	314 Pie Street	95.00		(✓)	02/12/2010 7...	(✓)	(○)	(✓)	
		Patient #4877	666 Hollywo...	41.00		(○)	02/12/2010 7...	(✓)	(✓)	(✓)	Deceased
		Patient #4840	123 Main St.	24.00		(○)	02/12/2010 7...	(○)	(○)	(○)	Delayed
TOTAL ITEMS: 251 SELECTED ITEMS: 0											

FIGURE 5-2: Entities in a matrix

Measures are data elements that allow, when taken together, for a clear picture of the status of a given **Entity**. For example, if the hospital entity is being monitored, useful measures might include supplies of blood and medications on hand in the hospital, and the current diversion status of the facility.

FIGURE 5-3 shows sample measures that could be used with a patient entity.

Name		Description	Measure	Alternate Name	Is Hidden
<input type="radio"/>	Name	Last Name	Incident		<input type="checkbox"/>
<input type="radio"/>	Last Name	First Name	Patient ID		<input type="checkbox"/>
<input type="radio"/>	First Name	Gender	Triage Status		<input type="checkbox"/>
<input type="radio"/>	Gender	Age	Triage Time		<input type="checkbox"/>
<input type="radio"/>	Age	Weight	Transport Destination		<input type="checkbox"/>
<input type="radio"/>	Weight	Address	JurisdictionUnit		<input type="checkbox"/>
<input type="radio"/>	Address	City	Departure Time		<input type="checkbox"/>
<input type="radio"/>	City	State	Arrival Time		<input type="checkbox"/>
<input type="radio"/>	State	ZIP	Division		<input type="checkbox"/>
<input type="radio"/>	ZIP	Phone	FloorNumberUnit		<input type="checkbox"/>
<input type="radio"/>	Phone	Head Injury	Position		<input type="checkbox"/>
<input type="radio"/>	Head Injury	C-Spine	HandheldID		<input type="checkbox"/>
<input type="radio"/>	C-Spine	Blunt Trauma	Latitude		<input type="checkbox"/>
TOTAL ITEMS: 50			TOTAL ITEMS: 14 SELECTED ITEMS: 0		
SELECTED ITEMS: 0					

FIGURE 5-3: List of measures in a matrix



Note: It can be helpful to think of an **Entity** as a box containing useful information that needs to be tracked and a **Measure** as one of the items of interest in the box.

5 - 1: Entity Groups

Entity Groups contain the facilities, people and other entities that are described by the measures in the system. The **Entity Groups**' tool is used in Admin mode to create and edit groups. Entities are added to and deleted from the group by users working in HC Standard® or with a mobile application. To add or delete entities, a user must have specific permission granted by an Admin.

An entity group contains similar entities and all of the measures that apply to those entities. For example, a "beds" entity group would contain all of the different "bed" entities that need to be tracked, as well as all of the measures (i.e. specific data categories/things) that must be known about those beds.

FIGURE 5-4 lists examples of entity groups, their description, locked status and reason, and number of entities.

ENTITY GROUPS								Display	Search here	Create New Entity Group	Actions
	Name	Plural	Icon	Description	Locked	Lock Reason	Entities	Last Mod...			
	Device Information	Device Information		Mobile Device Informatio...	<input checked="" type="checkbox"/>	Changing the measures o...		3/12/15 11:1			
	Field Interview			Field Interview Entity Gr...	<input type="checkbox"/>			3/12/15 11:1			
	Hospital	Hospitals		Hospital	<input type="checkbox"/>		83	3/13/15 1:3			
	Meds				<input type="checkbox"/>			3/13/15 3:2			
	Mortuary Affairs			Mortuary Affairs Entity Gr...	<input type="checkbox"/>			3/12/15 11:1			
	Patient Information	Patient Information		PTS Patient Information R...	<input checked="" type="checkbox"/>	Changing the measures o...	5000	3/12/15 11:1			
	RT DepreciationCategory	RT DepreciationCategories		Resource Tracking Deprec...	<input type="checkbox"/>			3/12/15 11:1			
	RT DepreciationClass	RT DepreciationClasses		Resource Tracking Deprec...	<input type="checkbox"/>			3/12/15 11:1			
	RT Grouping	RT Groupings		Resource Tracking Groupi...	<input type="checkbox"/>			3/12/15 11:1			
	RT GroupType	RT GroupTypes		Resource Tracking Group ...	<input type="checkbox"/>			3/12/15 11:1			
	RT Item	RT Items		Resource Tracking Items E...	<input type="checkbox"/>			3/12/15 11:1			
	RT ItemType	RT ItemTypes		Resource Tracking Item Ty...	<input type="checkbox"/>			3/12/15 11:1			

TOTAL ITEMS: 32 SELECTED ITEMS: 0

FIGURE 5-4: Entity Groups

An entity can have many different measures placed within it. Entities that have common attributes, such as hospitals, are placed into entity groups. Measures can also be placed in groups created by administrators, but can be left in the default group. The example in FIGURE 5-5 shows the relationship of a hospital entity group, containing entities **Hospital 1** and **Hospital 2**. Each hospital entity contains entire measure groups (e.g. blood types) and individual measures that belong to other measure groups (e.g. hospital status).

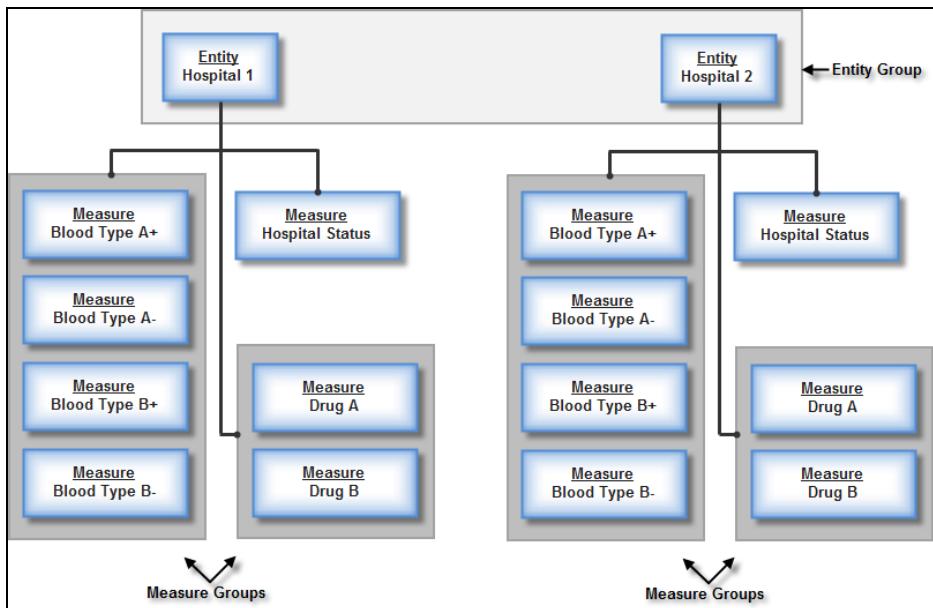


FIGURE 5-5: Entity Relationship Diagram

The purpose of HC Standard® is to track the status of entities, such as hospitals or patients. The functionality in the entities category allows for the creating and defining of the unique entities and statuses that need to be tracked throughout different organizations.

To manage entity groups, as shown in FIGURE 5-6:

1. Click or tap on the **Entities** icon.
2. Click or tap on the **Entity Groups** icon under the **Manage My Entities** section.

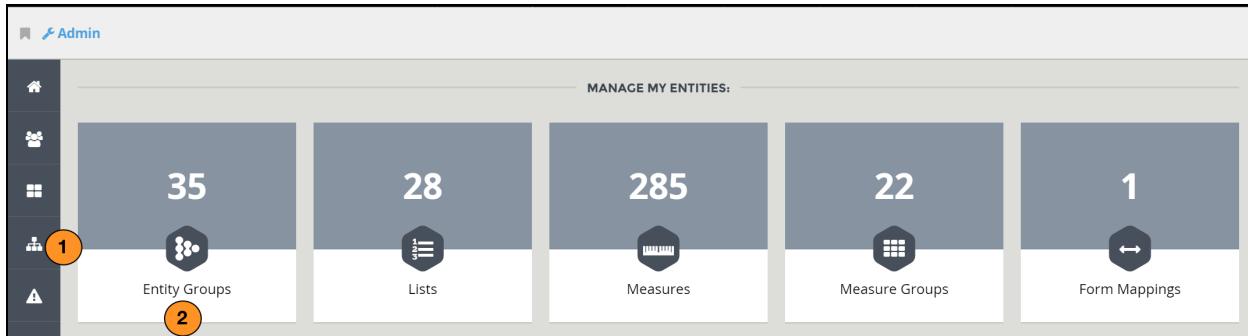


FIGURE 5-6: Entity Groups button

On the main **Entity Groups** page there is a list of existing entity groups, and several parameters that define each one.

To create a new entity group, as shown in FIGURE 5-7:

1. Click or tap **Create New Entity Group** button.

	ENTITY GROUPS							Display	Actions
	Name	Plural	Icon	Description	Locked	Lock Reason	Entities	Last Mod...	
	Device Information	Device Information		Mobile Device Informatio...	<input checked="" type="checkbox"/>	Changing the measures o...		3/12/15 11:1	
	Field Interview			Field Interview Entity Gr...	<input type="checkbox"/>			3/12/15 11:1	
	Hospital	Hospitals		Hospital	<input type="checkbox"/>		83	3/13/15 1:3	
	Meds				<input type="checkbox"/>			3/13/15 3:2	
	Mortuary Affairs			Mortuary Affairs Entity Gr...	<input type="checkbox"/>			3/12/15 11:1	
	Patient Information	Patient Information		PTS Patient Information R...	<input checked="" type="checkbox"/>	Changing the measures o...	5000	3/12/15 11:1	
	RT_DepreciationCategory	RT_DepreciationCategories		Resource Tracking Deprec...	<input type="checkbox"/>			3/12/15 11:1	
	RT_DepreciationClass	RT_DepreciationClasses		Resource Tracking Deprec...	<input type="checkbox"/>			3/12/15 11:1	
	RT_Grouping	RT_Groupings		Resource Tracking Groupi...	<input type="checkbox"/>			3/12/15 11:1	
	RT_GroupType	RT_GroupTypes		Resource Tracking Group ...	<input type="checkbox"/>			3/12/15 11:1	
	RT_Item	RT_Items		Resource Tracking Items E...	<input type="checkbox"/>			3/12/15 11:1	
	RT_ItemType	RT_ItemTypes		Resource Tracking Item Ty...	<input type="checkbox"/>			3/12/15 11:1	

FIGURE 5-7: Create New Entity Group Button

The **Create New Entity Group** tool will open, with the **Details** tab already selected, as shown in FIGURE 5-8.

1. Enter a **Name**, the **plural** form used by the application when it refers to more than one entity, and the **Description** of the entity group.
2. Settings can also be chosen to **lock** the entity group and provide a **reason** for extra precautions. Locking will initiate a warning any time an Admin tries to make a change to the locked entity group. It will not prevent the change, but it will caution the administrator making the change to be certain that it is appropriate.
3. Within the **Edit Entity Group** tool, *click or tap* the **Measures** tab to review and change the measures that are available to use in conjunction with the selected entity group.

FIGURE 5-8: Edit Entity Group Dialog

To add measures to the entity group, as shown in FIGURE 5-9:

1. *Click or tap* the **Add Measures** button.

FIGURE 5-9: Add Measures button

Modifying which measures are added can be accomplished by moving them. For more information, see "Selecting Items from an Available List" on page 8.

The **Group Filter** drop-down list, pictured in FIGURE 5-10, filters the available measures by a specific measure group.

Description	BVM
Address	
Age	
Allergies	
Amputation	
Arrival date/time	
Bleeding Control	
Blunt Trauma	
Burn	
BVM	

FIGURE 5-10: Group Filter Dropdown

Measures can be associated with any number of entity groups. If certain measures need to be used with multiple entity groups (e.g. available beds being used within the entity groups for hospitals, nursing homes and alternate care facilities) they can be assigned to all entity groups, rather than being recreated for each individually.

To select a measure in the entity group that will act as the entity identifier, as shown in FIGURE 5-11:

1. Click or tap the **Display Measure** tab.
2. Set a **Display Measure** by selecting a measure from the drop-down list. This measure is how to identify the entities in a matrix. For example, if an entity group is created for tracking people, a name measure may be selected. If an entity group is being created for tracking products, a serial number measure may be selected.
3. Set a **Unique Measure** by selecting a measure from the drop-down list. Data entered in this measure for each entity will act as the unique identifier for the entity and prevents duplicate entities from being created.

FIGURE 5-11: Edit Entity Group - Display Measure

To exit the edit entity group tool, as shown in FIGURE 5-12:

1. Click or tap the **Save** button to keep any changes.
- OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 5-12: Save and Back Buttons

5 - 1.1 Sections

Sections allow an Administrator to break up measures into sections when displayed in the Entity View, as shown in FIGURE 5-13:

FIGURE 5-13: Sections in Entity View

Sections are managed in an entity group and will automatically apply to all matrices created from the entity group.

To add or modify sections, as shown in FIGURE 5-14:

1. Double click or tap an existing entity group.

	Name	Plural	Icon	Description	Locked	Lock Reason	Entities	Last Mod.
Device Information	Device Information			Mobile Device Informatio...	<input checked="" type="checkbox"/>	Changing the measures o...		3/12/15 11:1
Field Interview				Field Interview Entity Gr...	<input type="checkbox"/>			3/12/15 11:1
Hospital	1 Hospitals			Hospital	<input type="checkbox"/>		83	3/13/15 1:3
Meds					<input type="checkbox"/>			3/13/15 3:2
Mortuary Affairs				Mortuary Affairs Entity Gr...	<input type="checkbox"/>			3/12/15 11:1
Patient Information	Patient Information			PTS Patient Information R...	<input checked="" type="checkbox"/>	Changing the measures o...	5000	3/12/15 11:1
RT_DepreciationCategory	RT_DepreciationCategories			Resource Tracking Deprec...	<input type="checkbox"/>			3/12/15 11:1

FIGURE 5-14: Select Entity Group

The **Edit Entity Group** tool will open, with the **Details** tab selected, as shown in FIGURE 5-15:

1. Click or tap the **Sections** tab.

This screenshot shows the 'Edit Entity Group - Details' interface. The top navigation bar includes 'Admin > Entity Groups > Patient Information | Details'. The tabs at the top are 'Details' (selected), 'Sections' (highlighted with a red circle containing the number 1), 'Measures', and 'Display Measure'. On the left, there's a sidebar with icons for Home, Admin, Entity Groups, and Help. The main area has two sections: 'General' and 'Options'. Under 'General', there are fields for 'Name' (Patient Information), 'Plural' (Patient Information), 'Icon' (set to 'Pick an icon'), and 'Description' (PTS Patient Information Record). Under 'Options', there's a checked checkbox for 'Locked'. At the bottom right are 'Save' and 'Back' buttons.

FIGURE 5-15: Edit Entity Group - Details

To create a new section, as shown in FIGURE 5-16:

1. Click or tap the **Add Section** button and enter a section name.
2. Click or tap the **pencil** icon next to an existing section to edit the name.
3. Sort the sections using the **up** and **down** arrow button.
4. Click or tap the **Measures** tab when complete.

This screenshot shows the 'Edit Entity Group - Sections' interface. The top navigation bar is identical to Figure 5-15. The tabs are 'Details', 'Sections' (selected and highlighted with a red circle containing the number 4), 'Measures', and 'Display Measure'. The main area displays a list of sections: Name, Globals, Status, Complaint, Vitals, and Treatment. Each section has a 'Sort Order' column with up and down arrows. To the right of the list is a sorting grid with numbered circles (1, 2, 3) indicating the current sort order. At the top right are 'Save' and 'Back' buttons, and a '1 + Add Section' button. A 'Filter Sections' search bar is also present.

FIGURE 5-16: Edit Entity Group - Sections

To assign a measure to a section, as seen in FIGURE 5-17:

1. Click or tap the **Section** drop-down for a particular measure and select a section.
2. Click or tap **Save** to commit changes to the entity group.
3. Click or tap **Back** to abandon changes to the entity group.

This screenshot shows the 'Edit Entity Group - Measures in Sections' interface. The top navigation bar is identical to previous figures. The tabs are 'Details', 'Sections', 'Measures' (selected and highlighted with a red circle containing the number 2), and 'Display Measure'. The main area shows a list of measures: Measure, Additional Agencies Involved, Address, Age, Allergies, Amputation, and Arrival Time. Each measure has an 'Alternate Name' field and a 'Section' dropdown. The 'Section' dropdown for 'Measure' is set to 'Information' (highlighted with a red circle containing the number 1). Other dropdown options include 'Other', 'Medical History', 'Complaint', and 'Transport'. At the top right are 'Save' (highlighted with a red circle containing the number 2) and 'Back' buttons, and a 'Remove Selected' button. A 'Filter measures' search bar is also present.

FIGURE 5-17: Edit Entity Group - Measures in Sections

The assigned measures will now appear in the appropriate sections for any matrix that is created from the entity group.

5 - 1.2 Other Entity Group Action(s)

One other action, delete, may be performed with entity groups.

To perform this action on an entity group, as shown in FIGURE 5-18:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

ENTITY GROUPS											<input type="button" value="Display"/>	<input type="text" value="Search here"/>	<input type="button" value="Create New Entity Group"/>	<input checked="" type="checkbox"/> Actions
	Name	Plural	Icon	Description	Locked	Lock Reason	Entities	Last M...						
<input type="radio"/>	Biodosimetry			Biodosimetry Entity Gro...	<input type="radio"/>		1	5/5/15						
<input checked="" type="radio"/>	Device Information	Device Information		Mobile Device Informati...	<input checked="" type="radio"/>	Changing the measures ...	2	5/5/15						

FIGURE 5-18: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 5-19.

1. **Delete** removes the entity group from the system.

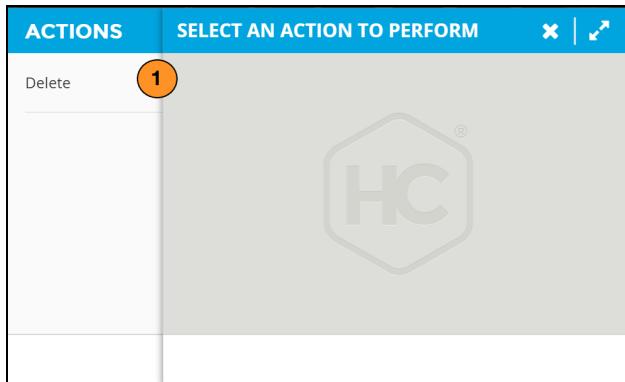


FIGURE 5-19: Entity Group - Other Actions

5 - 2: Lists

Lists are used to populate drop-downs that contain a set of **Items**. For example, a list of the fifty states could be created, and then used by measures called Home Address State, Work Address State and Birth State. **Lists** can also be helpful to store commonly used information (e.g. Triage Status, Divisions or Room Status).

To manage lists, as shown in FIGURE 5-20:

1. Click or tap on the **Entities** icon.
2. Click or tap on the **Lists** icon under the **Manage My Entities** section.

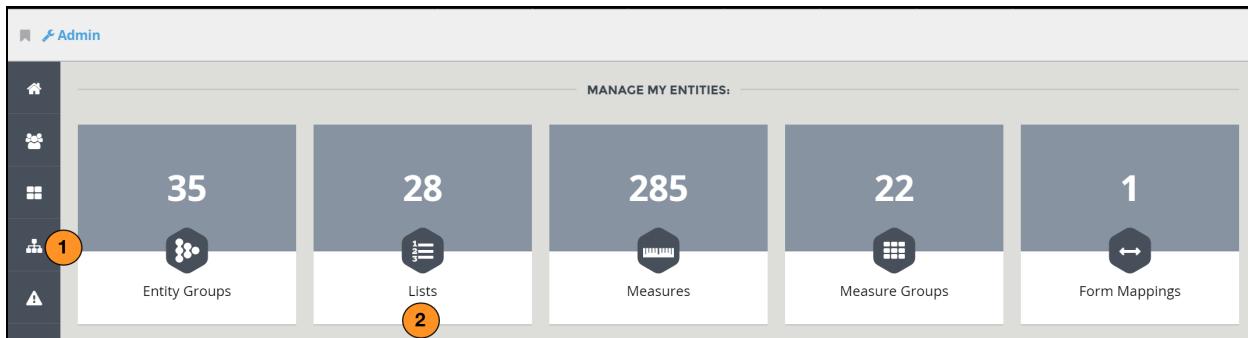


FIGURE 5-20: Lists

FIGURE 5-21 shows the main **Lists** page. This page presents all existing lists, along with their names and descriptions.

	Name	Description	List Items	Last Modified
<input type="radio"/>	Clinical Status		5	3/12/15 11:12 AM
<input type="radio"/>	Diversion Status		3	3/12/15 11:12 AM
<input type="radio"/>	Division		10	9/23/14 4:16 PM
<input type="radio"/>	Gender		2	9/23/14 4:16 PM
<input type="radio"/>	Importance		3	3/12/15 11:12 AM
<input type="radio"/>	Incident		11	3/12/15 6:37 PM
<input type="radio"/>	Item Type		2	3/12/15 11:16 AM
<input type="radio"/>	JurisdictionUnit		4	3/13/15 7:26 PM
<input type="radio"/>	Mental Status		4	9/23/14 4:16 PM
<input type="radio"/>	On/Off		2	9/23/14 4:16 PM
<input type="radio"/>	Position		14	9/23/14 4:16 PM
<input type="radio"/>	Race		4	3/12/15 11:16 AM
<input type="radio"/>	DT_CalendarUnitOfMeasurements		6	3/12/15 11:15 AM

TOTAL ITEMS: 22 SELECTED ITEMS: 0

FIGURE 5-21: Lists List

5 - 2.1 Creating a New List

To add a new list, as shown in FIGURE 5-22:

1. Click or tap on the **Create New PickList** button.



FIGURE 5-22: Create PickList Button

The **Create List** tool will open, with the **Details** tab already selected, as shown in FIGURE 5-23.

1. Enter a name for the list and a **description**, if desired.

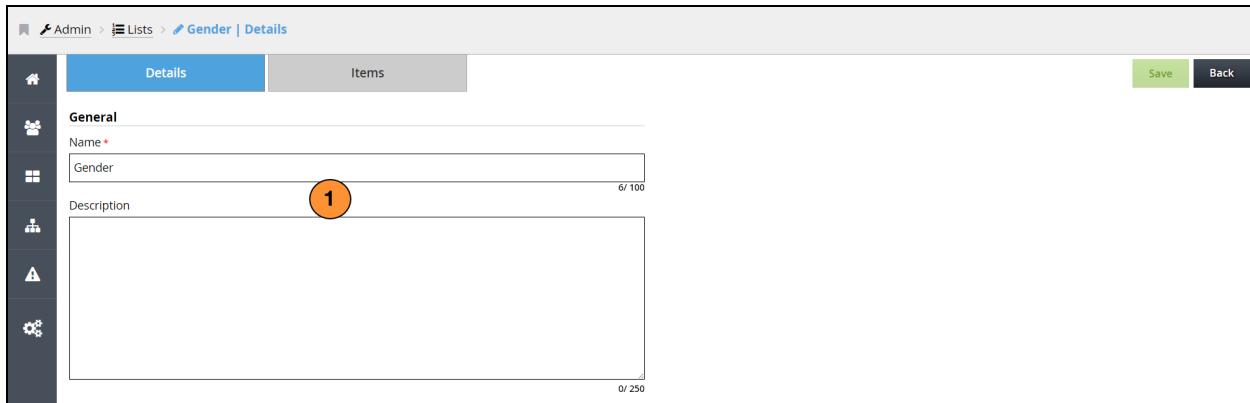


FIGURE 5-23: Creating PickList - Details

To add each individual item on the picklist, as shown in FIGURE 5-24:

1. Click or tap the **Items** tab.
2. Click or tap the **Add picklist item** button.

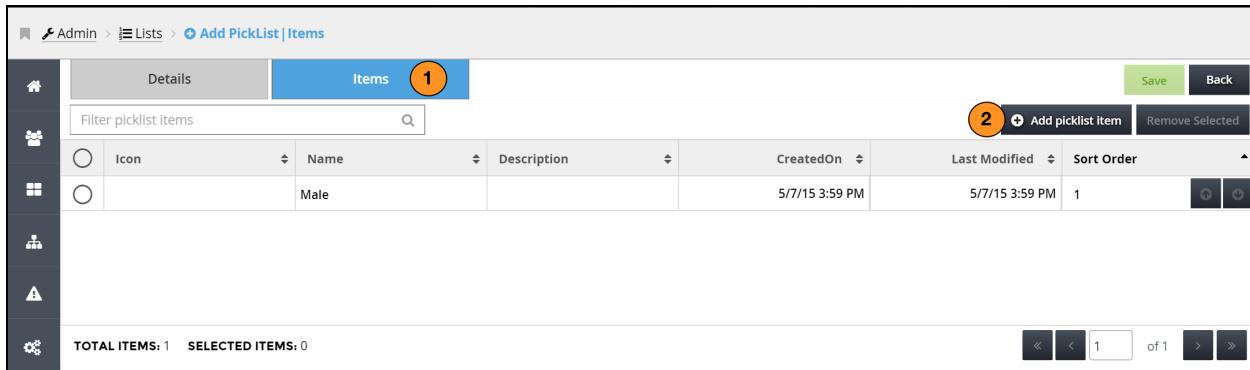


FIGURE 5-24: Create PickList - Items

Add item information, as shown in FIGURE 5-25.

1. Enter the **Name** of the item.
2. Enter a **Sort Order** that defines the position of the new item on the list. Leaving this as-is places the item at the bottom of the list.
3. Specific **Text Color** and **Background Color** can also be selected, along with an **icon**. The selected icon will appear in a matrix when this item is selected as the value for a measure that uses the list.
4. Click or tap the **Add** button.

The screenshot shows the 'Add picklist item' interface. On the left is a sidebar with icons for Home, Lists, and Admin. The main area has tabs for 'Details' and 'Items', with 'Items' selected. A left sidebar lists 'ADD PICKLIST ITEM' under 'General' and 'Description'. The 'General' section contains a 'Name' field with 'Female' and a 'Sort Order' field with '2'. The 'Customization' section includes 'Text Color' (black), 'Background Color' (pink), and an 'Icon' field with 'Pick an icon'. A green 'Add' button is at the top right, and a 'Back' button is below it. Numbered circles (1-4) highlight specific elements: 1 points to the 'Name' field, 2 points to the 'Sort Order' field, 3 points to the 'Background Color' bar, and 4 points to the 'Add' button.

FIGURE 5-25: Adding an Item to a PickList

To exit the lists tool, as shown in FIGURE 5-26:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.

The screenshot shows the 'Add PickList | Items' screen. It has tabs for 'Details' and 'Items', with 'Details' selected. A green 'Save' button and a black 'Back' button are at the top right. Numbered circles (1 and 2) point to the 'Save' and 'Back' buttons respectively.

FIGURE 5-26: Save and Back Buttons



Important! One of the measure types in HC Standard® is **List**, which requires users to pick from a list of options when assigning the value of that Measure. For example, the measure "Hospital Diversion Status" might offer the options "Open", "Special Diversion" and "Full". In these cases, the list must be created before the measure that will use it is created.

5 - 2.2 Other List Action(s)

One other action, delete, may be performed with lists.

To perform this action on a list, as shown in FIGURE 5-27:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

PICKLISTS				Display	Search here	Create New PickList	Actions
Name	Description	List Items	Last Modified				
<input type="radio"/>	Name						
<input checked="" type="radio"/>	1nical Status	5	3/12/15 7:12 AM				
<input type="radio"/>	Diversion Status	3	3/12/15 7:12 AM				

FIGURE 5-27: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 5-28.

1. **Delete** removes the list from the system.

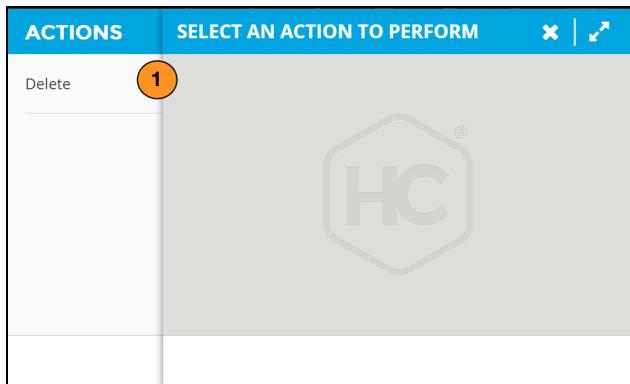


FIGURE 5-28: Lists - Other Actions

5 - 3: Measures

Measures contain the data that is tracked in HC Standard®. A measure is a specific piece of information that a user wants to know about an entity.

To manage measures, as shown in FIGURE 5-29:

1. Click or tap on the **Entities** icon.
2. Click or tap on the **Measures** icon under the **Manage My Entities** section.

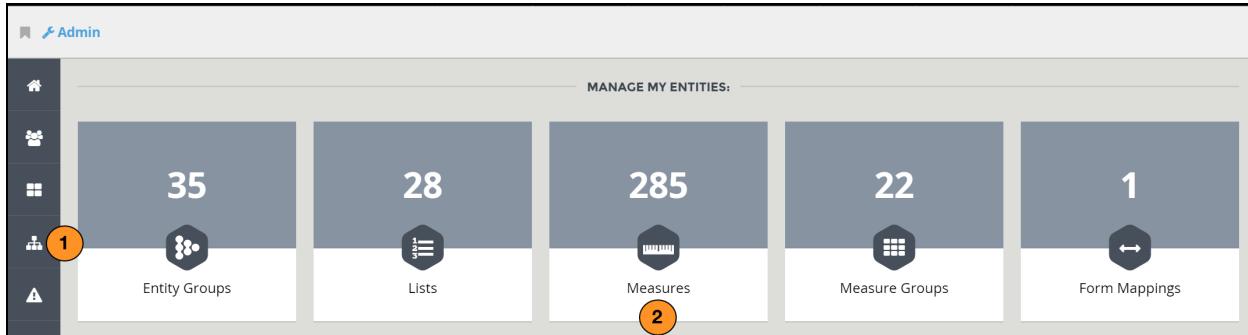


FIGURE 5-29: Measures

FIGURE 5-30 shows the **Measures** tool main page. This page contains a list of available measures and several parameters that define each one.

The screenshot shows a table titled 'MEASURES' with 227 items listed. The columns are: Name, Alternate Name, Measure Type, Format, Length, List, Relation, Icon, Description, and Add to all... . The table includes icons for each row and a search bar at the top right.

	Name	Alternate Name	Measure Type	Format	Length	List	Relation	Icon	Description	Add to all...
<input type="radio"/>	A-		Numeric	WholeNumber	28				Litres of A-blood	<input type="radio"/>
<input type="radio"/>	A+		Numeric	WholeNumber	28				Litres of A+ blood	<input type="radio"/>
<input type="radio"/>	AB-		Numeric	WholeNumber	28				Litres of AB- blood	<input type="radio"/>
<input type="radio"/>	AB+		Numeric	WholeNumber	28				Litres of AB+ blood	<input type="radio"/>
<input type="radio"/>	Activation Code		Text		30				Activation Code	<input type="radio"/>
<input type="radio"/>	Additional Info		Text		255				CDP Mobile Asset...	<input type="radio"/>
<input type="radio"/>	Address		Text		100				Address	<input type="radio"/>
<input type="radio"/>	Admin Number		Numeric	WholeNumber	28				CDP Mobile Asset...	<input type="radio"/>
<input type="radio"/>	Age		Numeric	Decimal2	28				Age	<input type="radio"/>
<input type="radio"/>	AgencyAffiliation		Text		256					<input type="radio"/>
<input type="radio"/>	Allergies		Text		250				Allergies	<input type="radio"/>
<input type="radio"/>	AltName		Text		200				Alternate Name	<input checked="" type="radio"/>

TOTAL ITEMS: 227 SELECTED ITEMS: 0

FIGURE 5-30: Measures List

5 - 3.1 Creating a New Measure

To add a new measure, as shown in FIGURE 5-31:

1. Click or tap the **Create New Measure** button.



FIGURE 5-31: Create New Measure Button

Selecting this button displays the **Add Measure** tool, as shown in FIGURE 5-32.

Fields used for measures include:

1. A **Name** for the measure is required and a **Description** may be included, if desired.
2. An **Alternate Name** can also be provided. For example, if the measure is "Aspirin", the alternate name might be "acetylsalicylic acid". Alternate names for a measure appear in the matrix column headers when displayed in HC Standard®.
3. Measures can be part of a **Measure Group** or the **Default Measure Group**. For example, "Aspirin" could be part of the "Painkillers" measure group.
4. **Measure type** is used to specify the kind of measure.
5. **Check Add to all new entity groups** to add this measure to all new entity groups automatically.
6. Customization options include **Format**, **Length**, **Default value**, and **Icon**. Icons will appear in a matrix, report, or map.

 A screenshot of the 'ADD NEW MEASURE' form. The left sidebar shows icons for General, Measure Type, Description, and Settings. The main form has sections for 'General' and 'Customization'. In the 'General' section, field 1 is 'Name' (Aspirin), field 2 is 'Alternate Name' (Acetylsalicylic Acid), field 3 is 'Measure Group' (Default), field 4 is 'Measure Type' (Numeric), and field 5 is a checkbox for 'Add to all new Entity Groups'. In the 'Customization' section, field 6 is 'Format' (Whole Number (1234)), field 7 is 'Length' (256), and field 8 is 'Icon' (Pick an icon).

FIGURE 5-32: Creating a new measure.



Note: Opening the **Edit Entity Group** tool to add a measure to an entity group will show the **Name** of available measures, not the **Alternate Name**.

The **Measure Type** can be in a number of different formats including: Checkbox, Date/Time, Numeric, List, Text, or Relation. By default, the measure will be a Text type that is 256 characters long. Depending on the measure type selected from the drop-down list, there can be additional specifications for **Format**, **Length**, and **List** parameters. For example, if the "Numeric" measure type is chosen, the format could be specified as "Whole Number", "Decimal", "Currency", etc.

The available measure types and their formats are listed in the table below.

Measure Types and Formats

<u>Measure Type</u>	<u>Format</u>
Checkbox	<ul style="list-style-type: none"> Not Applicable
Date/Time	<ul style="list-style-type: none"> Date Only (MM/DD/YY) Date and Time (MM/DD/YY HH:MM:SS) Time Only (HH:MM:SS)
Numeric	<ul style="list-style-type: none"> Whole Number (1234) Percent (12%) Decimal (1234.00) Coordinate (25.000023) Currency (\$1234.00) General (123.456)
List	<ul style="list-style-type: none"> Not Applicable
Text	<ul style="list-style-type: none"> Not Applicable
Relation	<ul style="list-style-type: none"> Not Applicable

To exit the measures tool, as shown in FIGURE 5-33:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 5-33: Save and Back Buttons



Note: Measures are always associated with exactly one group. If a measure is not placed in another group, it will be placed in the default group.

5 - 3.2 Other Measure Action(s)

One other action, delete, may be performed with measures.

To perform this action on a measure, as shown in FIGURE 5-34:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

MEASURES											<input type="button" value="Display"/>	<input type="text" value="Search here"/>	<input type="button" value="Create New Measure"/>	<input checked="" type="checkbox"/> Actions
	Name	Alternate Na...	Measure Type	Format	Length	List	Relation	Icon	Description					
<input type="radio"/>	A-		Numeric	WholeNumber	28								Litres of A- blood	
<input checked="" type="radio"/>	1		Numeric	WholeNumber	28								Litres of A+ bloo	

FIGURE 5-34: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 5-35.

1. Delete removes the list from the system.

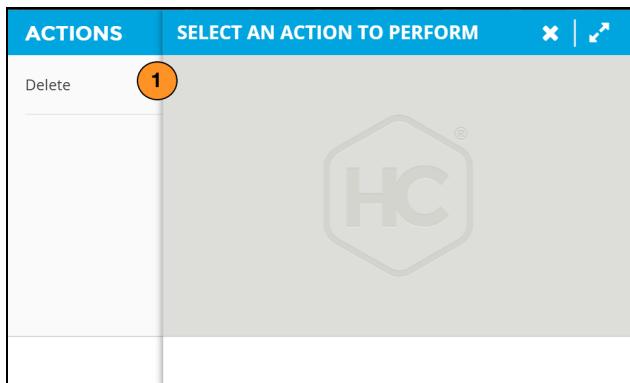


FIGURE 5-35: Measure - Other Actions

5 - 4: Measure Groups

The **Measure Groups** tool provides the ability to gather any number of measures together under a common label. For example, a patient's measure group would include Name, Age, Gender, and Triage Status measures.

To manage measure groups, as shown in FIGURE 5-36:

1. Click or tap on the **Entities** icon.
2. Click or tap on the **Measure Groups** icon under the **Manage My Entities** section.

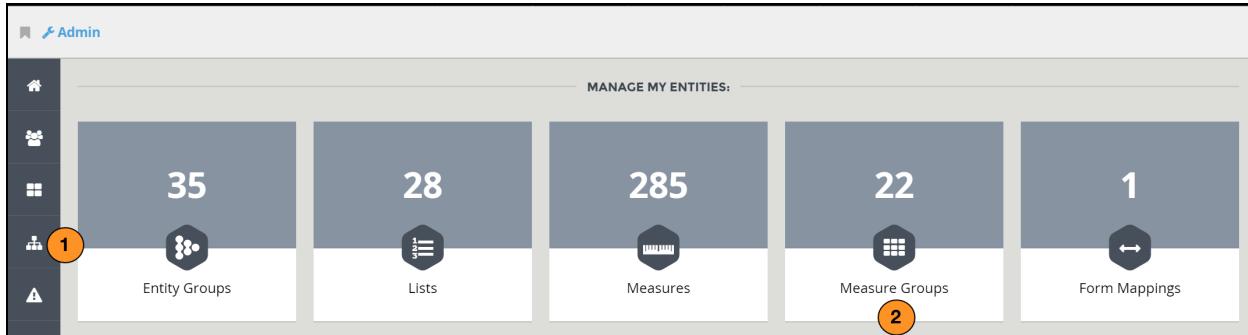


FIGURE 5-36: Measure Groups

FIGURE 5-37 shows the main **Measure Group** page. This page lists all existing measure groups, along with their names and descriptions.

MEASURE GROUPS				
	Name	Description	Measures	Last Modified
Entity Group	Name		8	3/12/15 11:12 AM
Entity Group	Blood		16	3/12/15 11:11 AM
Entity Group	Default		11	3/12/15 11:11 AM
Entity Group	Device Information		8	3/12/15 11:15 AM
Entity Group	Drivers License Info		17	3/12/15 11:16 AM
Entity Group	Field Interview	Used for measures for the Field Interview Entity Group	7	3/12/15 11:16 AM
Entity Group	Mortuary Affairs	Used for measures for the Mortuary Affairs Entity Group	60	3/12/15 11:15 AM
Entity Group	Patient Information		2	3/12/15 11:11 AM
Entity Group	Position		10	3/12/15 11:15 AM
Entity Group	RT-AddOns		1	3/12/15 11:15 AM
Entity Group	RT-FEMA		6	3/12/15 11:15 AM
Entity Group	RT-Grouping		5	3/12/15 11:15 AM
Entity Group	RT-Item		7	3/12/15 11:15 AM
Entity Group	RT-Location			

FIGURE 5-37: Measure Groups Listing

5 - 4.1 Creating a New Measure Group

To create a new group, as shown in FIGURE 5-38:

1. Click or tap on the **Create New Measure Group** button.



FIGURE 5-38: Create New Measure Group Button

The **Add Measure Group** tool displays with the **Details** tab already selected, as shown in FIGURE 5-39.

1. Enter a **name** for the group and a **description**, if desired.

This screenshot shows the 'Add measure group | Details' form. On the left is a sidebar with icons for home, users, measures, and settings. The main area has two tabs: 'Details' (which is selected and highlighted with a red circle) and 'Measures'. Under the 'Details' tab, there are fields for 'Name' (containing 'Painkillers') and 'Description' (containing 'Non-prescription'). In the bottom right corner of the main area, there are 'Save' and 'Back' buttons.

FIGURE 5-39: Creating Measure Group - Details

To associate individual measures with the new group, as shown in FIGURE 5-40:

1. Click or tap on the **Measures** tab.
2. Click or tap the **Add Measures** button. Select the desired **measures** from the available list to add them to the measures in the group. For more information, see "Selecting Items from an Available List" on page 8.

This screenshot shows the 'Add measure group | Items' form. It has a similar structure to Figure 5-39, with a sidebar and tabs for 'Details' and 'Measures'. The 'Measures' tab is selected and highlighted with a red circle. Below it, there's a search bar with 'Add Measures' and a count of '2 other measures'. A list of measures is shown, with one item selected. At the bottom, there are buttons for 'Save', 'Back', and 'Remove Selected', along with pagination controls.

FIGURE 5-40: Creating Measure Group - Measures

To exit the measures groups too, as shown in FIGURE 5-41:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 5-41: Save and Back Buttons

5 - 4.2 Other Measure Group Action(s)

One other action, delete, may be performed with measure groups.

To perform this action on a measure group, as shown in FIGURE 5-42:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

MEASURE GROUPS				
	Name	Description	Measures	Last Modified
<input type="radio"/>	Blood		8	5/5/15 11:36 AM
<input checked="" type="radio"/> 1	fault		16	5/5/15 11:36 AM

FIGURE 5-42: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 5-43.

1. **Delete** removes the measure group from the system.

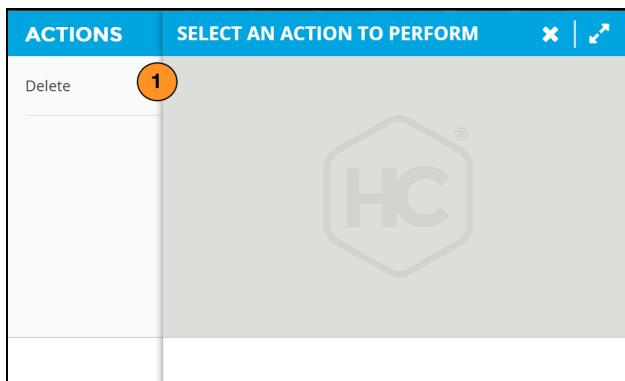


FIGURE 5-43: Measure Groups- Other Actions

5 - 5: Form Mapping

The **Form Mapping** tool provides the ability to upload a PDF form and link it with a matrix. After establishing a Form Mapping, Admins will use the Forms tool to create the workspace item and place it in a specific workspace, see "Forms" on page 99.

To manage form mappings, as shown in FIGURE 5-44:

1. Click or tap on the **Entities** icon.
2. Click or tap on the **Form Mappings** icon under the **Manage My Entities** section.

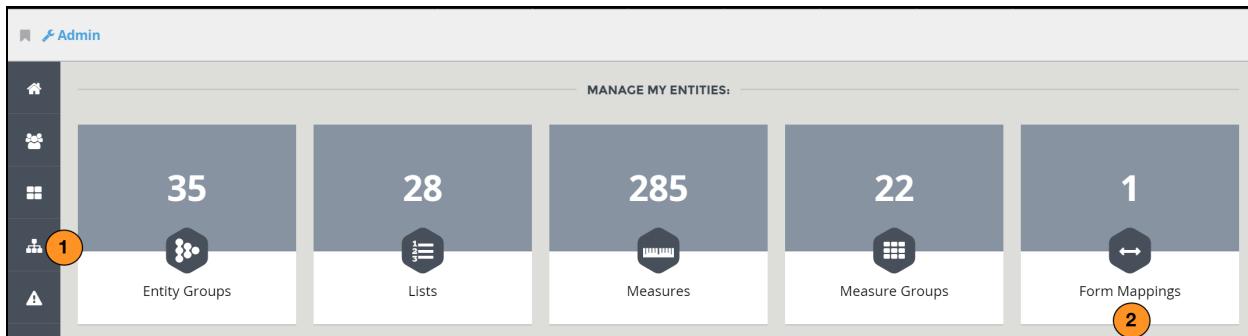


FIGURE 5-44: Form Mapping

FIGURE 5-45 shows the main **Form Mappings** page. This page shows a series of all existing form mappings, along with their names and descriptions.

	Name	Description	Form File ID	Matrix View ID	Matrix	Created On	Modified On
<input type="radio"/>	Hospital Status Form		197	16	35	3/16/15 6:22 PM	3/16/15 6:22 PM

TOTAL ITEMS: 1 SELECTED ITEMS: 0

FIGURE 5-45: Form Mappings Listing

5 - 5.1 Upload a New Form

Before a new PDF form can be utilized, the form must first be uploaded and then the form mapping can be created.



Note: A fillable PDF form is required to use Forms in HC Standard. For more information on how to create a fillable form, see <https://helpx.adobe.com/acrobat/kb/create-fillable-pdf-forms-acrobat.html>.

To upload a new form, as shown in FIGURE 5-46:

1. Click or tap on the **Upload Forms** button.

FIGURE 5-46: Upload Forms Button

The **Forms** tool will open, as shown in FIGURE 5-47

1. Click or tap on the **Choose Files** or **Browse** button to upload a file. In the screen that opens, navigate to the location where the file is stored, select it, and click the **Open** button.
2. Alternatively, the user can *drag & drop* files into the browser window to select the file for upload.
3. Enter a name for the PDF in the **Name** field.
4. Click or tap the **Upload All** button when done.

FIGURE 5-47: Upload Forms Naming

5 - 5.2 Creating a New Form Mapping

Form mappings are used to associate an existing or new PDF form to a matrix.

To add a form mapping, as shown in FIGURE 5-48:

1. Click or tap the **Create Form Mapping** button.

FIGURE 5-48: Upload Files Button

The **Add Form Mapping** tool will be displayed with the **Details** tab selected, as shown in FIGURE 5-49.

1. Enter a **Name** for the form mapping and description, if desired.
2. Select the **Workspace** then **Matrix** that will be used to map the form.
3. Select the **Form**.

Admin > Form Mappings > Add Form Mapping | Details

General	Parameters
Name <input type="text" value="New Form"/> 1	Workspace Beds and Facilities
Description <div style="height: 100px;"></div>	Matrix All clinics
	Form Pages from HICS 251-Facili

Save Back

FIGURE 5-49: Form Mapping - Details tab

To associate a form field with a measure, as shown in FIGURE 5-50:

1. Click or tap the **Map** tab. This tab is where form fields are tied to specific measures.
2. Select the form field under the **Form Fields** section.
3. Select a measure under the **Matrix Measures** section.
4. Click or tap the **Add Mapping** button to save the association. The relationship will be saved and displayed in the **Mapped Measures** section.

Repeat as necessary for all fields in the form.

To remove a mapped measure, as shown in FIGURE 5-50:

5. Select the relationship to be deleted.
6. Click or tap the **Remove Mapping** button.

Admin > Form Mappings > Add Form Mapping | Map

General	Mapped Measures		
Form Fields Disposable Exam Gloves YN 2	Matrix Measures Does your health center have an updated screening 3		
<table border="1"> <tr> <td>Form Field Name CDC Guidelines YN</td> <td>Measure Name Does your current supply of PPE meet the lat...</td> </tr> </table>		Form Field Name CDC Guidelines YN	Measure Name Does your current supply of PPE meet the lat...
Form Field Name CDC Guidelines YN	Measure Name Does your current supply of PPE meet the lat...		

Add Mapping Remove Mapping 4 6

FIGURE 5-50: Form Mapping - Map tab

When done mapping form fields to measures, *click or tap* the **Preview** tab to see how the form will look.

To exit the form mappings tool, as shown in FIGURE 5-51:

1. *Click or tap* the **Save** button to keep any changes.
- OR
2. *Click or tap* the **Back** button to abandon any changes and close the tool.



FIGURE 5-51: Save and Back Buttons

For the next process in adding a Form to HC Standard®, see "Forms" on page 99.

5 - 5.3 Other Form Mappings Action(s)

One other action, delete, may be performed with form mappings.

To perform this action on a form mapping, as shown in FIGURE 5-52:

1. *Click or tap* the **circle** of the desired item.
2. *Click or tap* the **Actions** button.

FORM MAPPINGS					<input type="checkbox"/> Display	Search here	<input type="button" value="Upload Forms"/>	<input type="button" value="Create Form Mapping"/>	<input checked="" type="checkbox"/> Actions
<input type="radio"/>	Name	▲	Description	▼	CreatedOn	▼	ModifiedOn	▼	
<input type="radio"/>	Hospital Status Form				3/16/15 2:22 PM		3/16/15 2:22 PM		
<input checked="" type="radio"/>	1 Client Triage				5/7/15 1:10 PM		5/7/15 1:10 PM		

FIGURE 5-52: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 5-53.

1. **Delete** removes the list from the system.

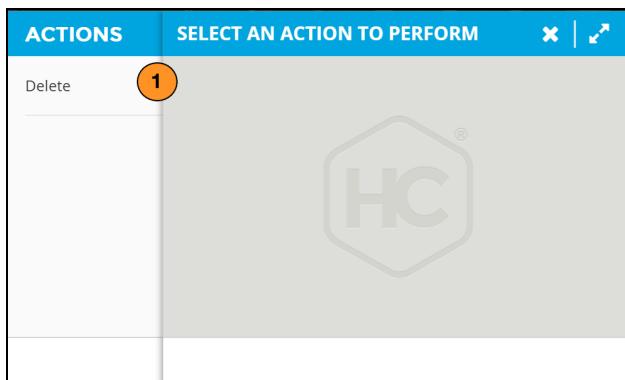


FIGURE 5-53: Form Mappings - Other Actions

Chapter 6 - Workspace Items

Workspaces are matched with groups of users so that the users may access the information they need. Tools in workspace items are to aid in the creating, editing, and managing of the contents within the workspaces.

Each workspace item tool has a specific purpose, as shown in FIGURE 6-1.

1. **Workspaces** contain the settings to create, edit, and delete workspaces. Other settings, including which users can see a workspace and which controls are available, can also be found here.
2. **Files** are images, documents, audio files, etc., that are associated with workspaces.
3. **Announcements** allow users with appropriate permission to create messages that are placed in workspaces and are displayed for users assigned to those workspaces when the user(s) log in.
4. **Links** allow for the sharing of URLs for websites related to that specific workspace.
5. **Matrices** display data in a table, with each row representing an entity, and each column containing the data for a measure.
6. **Charts** display matrix data in pie or bar graphical format.
7. **Reports** format data for print output. Reports can also be easily exported to files in several popular formats.
8. **Maps** allow data to be placed on a map in the geographically correct location for any entity that has been "geocoded", meaning that a latitude and longitude have been provided for the entity. Mapping functionality requires the optional Maps Extension.
9. **Forms** allow PDF documents to be uploaded and mapped to matrix data at a later time.

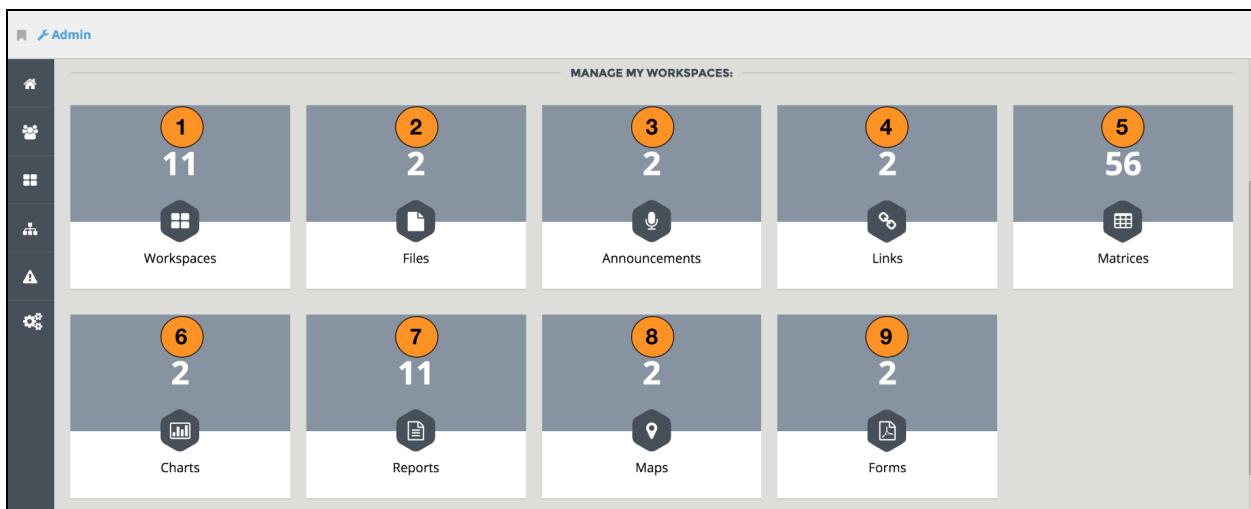


FIGURE 6-1: Workspace Items

6 - 1: Files

The **Files** tool allows for the uploading of almost any type of file into the system. These files then become available to be placed in any number of workspaces.

To manage files, as shown in FIGURE 6-2:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Files** icon under the **Manage My Workspaces** section.

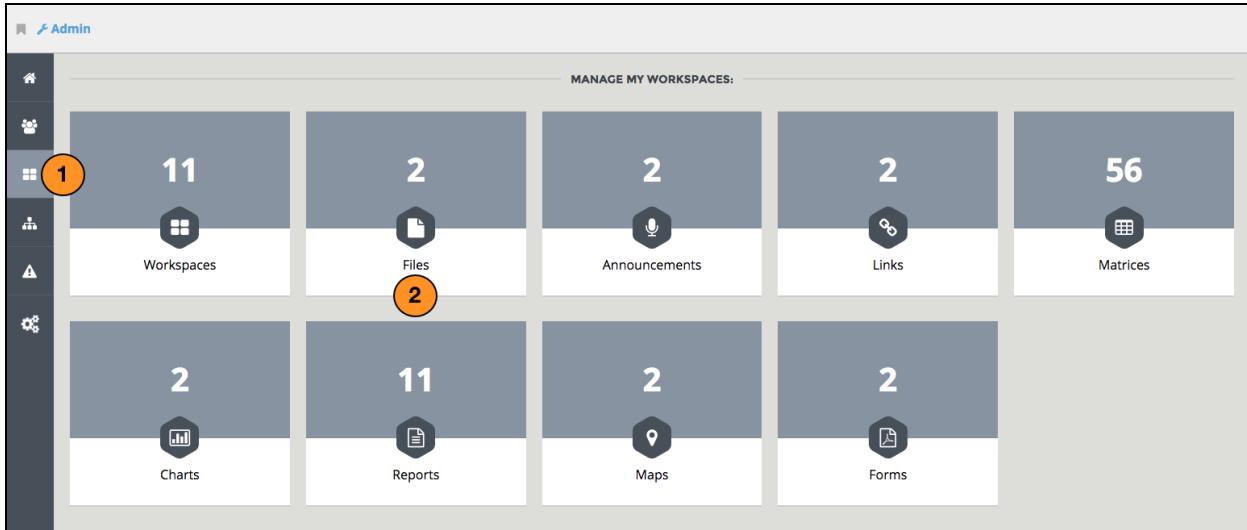


FIGURE 6-2: Files

FIGURE 6-3 shows the main **Files** page. This page lists all existing files, along with the description provided for each, if any.

The screenshot shows the 'FILES' list page. The top navigation bar includes 'Admin' and 'Files' icons, and buttons for 'Display', 'Search here', 'Upload Files', and 'Actions'. The main area is a table with the following data:

Name	File Name	Workspaces	Last Modified
Application for Employment 20150318.pdf	Application for Employment 20150318.pdf	0	7/7/15 6:30 PM
DHS.pdf	DHS.pdf	2	4/20/15 12:38 PM
Humana Dental Plan 2014-2015.pdf	Humana Dental Plan 2014-2015.pdf	0	5/21/15 2:53 PM
PTSConfig.plist	PTSConfig.plist	1	5/11/15 9:30 AM

TOTAL ITEMS: 4 SELECTED ITEMS: 0

FIGURE 6-3: Files List

6 - 1.1 Uploading a New File

Files can be added to the database from any device connected to a user's computer, such as a local hard drive, a flash drive, or network location.

To add files, as shown in FIGURE 6-4:

1. Click or tap the **Upload Files** button.



FIGURE 6-4: Upload Files Button

Selecting this button will display the **Upload Files** tool, showing the files on the local hard drive that can be selected for upload, as shown in FIGURE 6-5.

To upload a file:

1. Click or tap on the **Choose Files** or **Browse** button. Navigate to the location where the newly uploaded file is stored. Select the newly uploaded file and click or tap the **Open** button.

To return to the **Upload** tab without selecting a file, click or tap the **Cancel** button. Clicking or tapping the **Open** button will cause the file name to be shown in the **Upload** tab.

2. Alternatively, files can be *dragged & dropped* into the browser window to select the file for upload.
3. Enter the name the file should have in HC Standard® in the **Name** field.
4. Enter a description for the file, if desired, in the **Description** field.
5. Click or tap the **Workspaces** tab. Select **Workspaces** from the available groups to place the file. For more information, see "Selecting Items from an Available List" on page 8.
6. Click or tap the **Upload All** button to upload the file.
7. Click or tap the **Back** button.

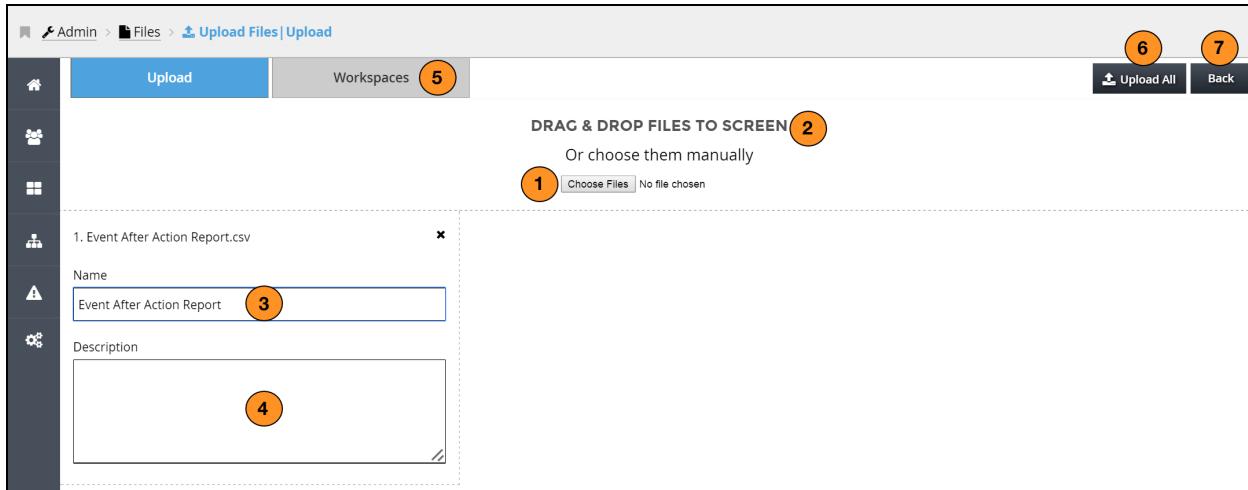


FIGURE 6-5: Upload a File

6 - 1.2 Other File Action(s)

One other action, delete, may be performed with files.

To perform any of the above actions on one or more files, as shown in FIGURE 6-6:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

FILES			
	File Name	Workspaces	Last Modified
<input type="radio"/>	DHS.pdf	1	4/20/15 12:38 PM
<input checked="" type="radio"/> 1	PTSConfig.plist	1	10/23/14 11:08 AM

FIGURE 6-6: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-7:

1. Delete removes the file from the system.

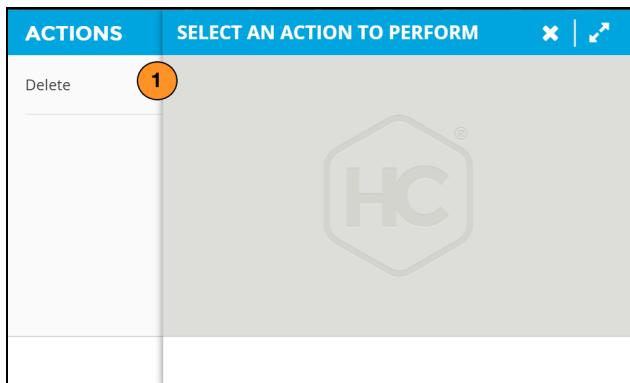


FIGURE 6-7: Files - Other Actions

6 - 2: Announcements

Announcements are notices that are posted on a bulletin board within a workspace. Announcements are also highlighted separately on the user's home screen.

To manage announcements, as shown in FIGURE 6-8:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Announcements** icon under the **Manage My Workspaces** section.

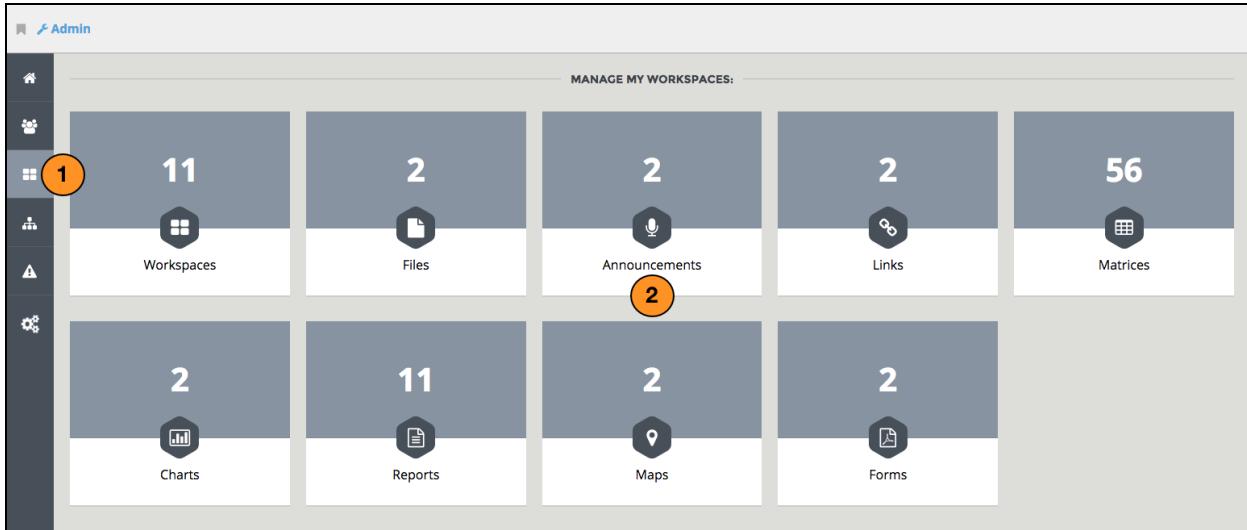


FIGURE 6-8: Announcements

FIGURE 6-9 shows the main **Announcements** page. This page lists all existing announcements, along with the message for each.

ANNOUNCEMENTS				
	Name	Message	Workspaces	Last Modified
<input type="radio"/>	Fire Drill Today	There will be a fire drill today at 0900. This is only a drill.	4	3/16/15 6:40 PM

TOTAL ITEMS: 1 SELECTED ITEMS: 0

FIGURE 6-9: Announcements List

6 - 2.1 Creating a New Announcement

To create a new announcement, as shown in FIGURE 6-10:

1. Click or tap the **Create New Announcement** button.



FIGURE 6-10: Create a New Announcement Button

The **Add Announcement** tool will display with the **Details** tab already selected, as shown in FIGURE 6-11.

1. Enter the **name** of the announcement.
2. Enter the information that needs to be shared in the **Message** field.
3. Click or tap the date field to set an **expiration date**, if desired.
4. Click or tap the **Workspaces** tab. Select workspaces from the available list. For more information, see "Selecting Items from an Available List" on page 8.

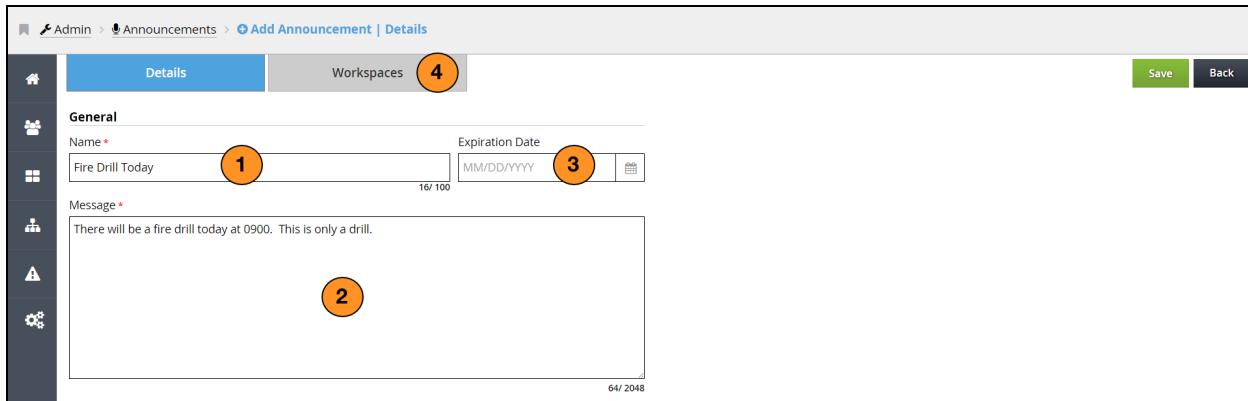


FIGURE 6-11: Add Announcement - Details



Note: The expiration default is set to “none”, however, an exact date is recommended to ensure that only current information is shown, and to prevent workspaces from becoming cluttered with outdated announcements. Announcements are automatically removed when they expire.

To exit the announcements tool, as shown in FIGURE 6-12:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-12: Save and Back buttons

6 - 2.2 Other Announcement Action(s)

One other action, delete, may be performed with announcements:

To perform any of the above actions on one or more announcements, as shown in FIGURE 6-13:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

ANNOUNCEMENTS			
	Name	Message	Workspaces
<input type="radio"/>	Fire Drill Today	There will be a fire drill today at 0900. This is only a drill.	4
<input checked="" type="radio"/> 1	Inspection Notice	There will be an official inspection....	0

FIGURE 6-13: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-14.

1. Delete permanently removes the announcement from the system.

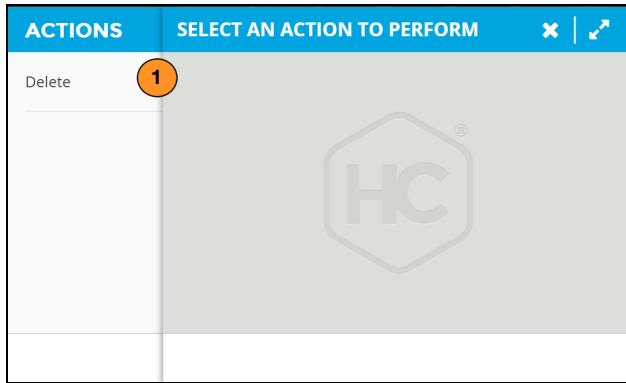


FIGURE 6-14: Announcements - Other Actions

6 - 3: Links

The **Links** tool allows website URLs to be saved as objects that can be placed in workspaces. The website links can be launched and viewed within the HC Standard® operating environment.

To manage links, as shown in FIGURE 6-15:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Links** icon under the **Manage My Workspaces** section.

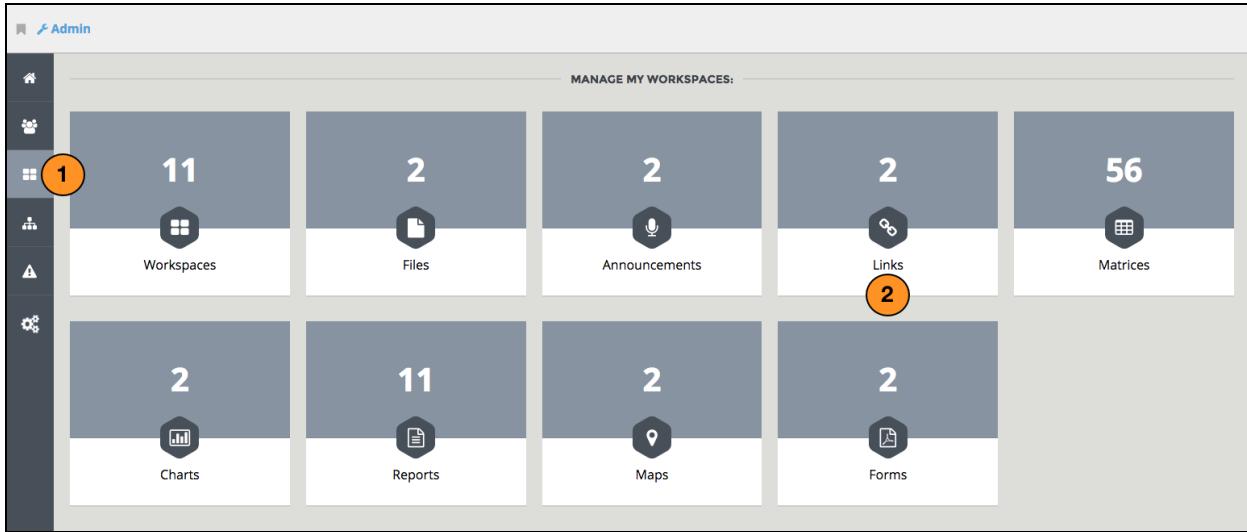


FIGURE 6-15: Links

FIGURE 6-16 below shows the main **Links** page. This page shows a list of existing links and the URL associated with each.

LINKS				
	Name	Url	Workspaces	Last Modified
	GER	http://www.ger911.com	1	3/12/15 6:57 PM

FIGURE 6-16: Links Listing

6 - 3.1 Creating a Link

To add a new link, as shown in FIGURE 6-17:

1. Click or tap on the **Create New Link** button.

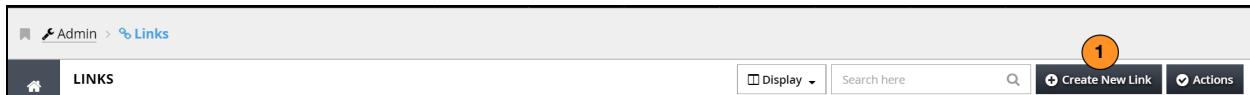


FIGURE 6-17: Create New Link Button

The **Add Link** tool will display with the **Details** tab already selected, as shown in FIGURE 6-18.

1. Enter a **Name** for the link, and select a **Type**.
2. Enter the website address into the **URL** field.
3. Select the **URL type**.

Types of URLs:

- **URL in tab:** Opens the link in a new browser tab. A user's browser will need to have pop-ups enabled for the HC Standard® site to view this link type.
 - **URL in frame:** Opens the link inside a frame in HC Standard®. Unsecured websites will not display unless mixed content settings are enabled in a user's browser settings.
 - **URL with session token in frame:** Enables single sign-on for HC Standard® applications. *For GER use only.*
 - **Twitter feed:** If entering a Twitter feed, use this type to properly display the feed.
 - **Camera:** Sentinel AVE camera links can be used with this type to overlay camera controls on the video. Other camera feeds may be added using **URL in tab** or **URL in frame** type.
4. To associate individual workspaces with the new link, click or tap on the **Workspaces** tab. Select an available **workspace** from the list. For more information, see "Selecting Items from an Available List" on page 8.
 5. To ensure the link is correct after entering the URL, click or tap the **Preview** tab.

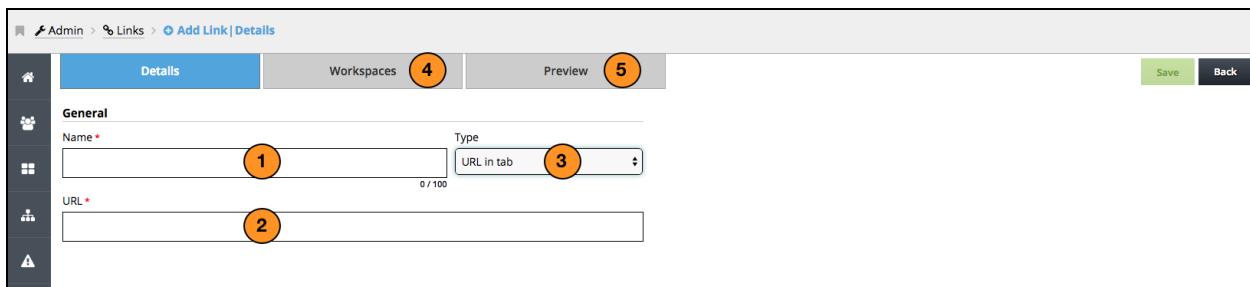


FIGURE 6-18: Adding a Link - Details

To exit the links tool, as shown in FIGURE 6-19:

1. Click or tap the **Save** button to keep any changes.
- OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-19: Save and Back buttons

6 - 3.2 Other Link Action(s)

One other action, delete, may be performed with links:

To perform this action on one or more links, as shown in FIGURE 6-20:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

LINKS				
	Name	Url	Workspaces	Last Modified
<input type="radio"/>	CNN	http://www.cnn.com	0	5/7/15 12:59 PM
<input checked="" type="radio"/> 1	R	http://www.ger911.com	2	3/12/15 2:57 PM

FIGURE 6-20: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-21.

1. **Delete** removes the link from the system.

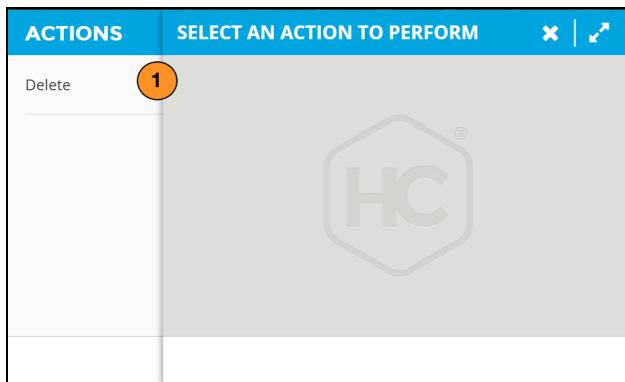


FIGURE 6-21: Links - Other Actions

6 - 4: Matrices

The **Matrices** tool creates a table view of data. Matrices are the heart of the system because data is entered and updated in matrices. Charts, reports and maps are generated from the data in a matrix. A matrix is a view of the data in a grid format, where each measure is a column and each entity (facilities, people, etc.) is a row.

To manage matrices, as shown in FIGURE 6-22:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Matrices** icon under the **Manage My Workspaces** section.

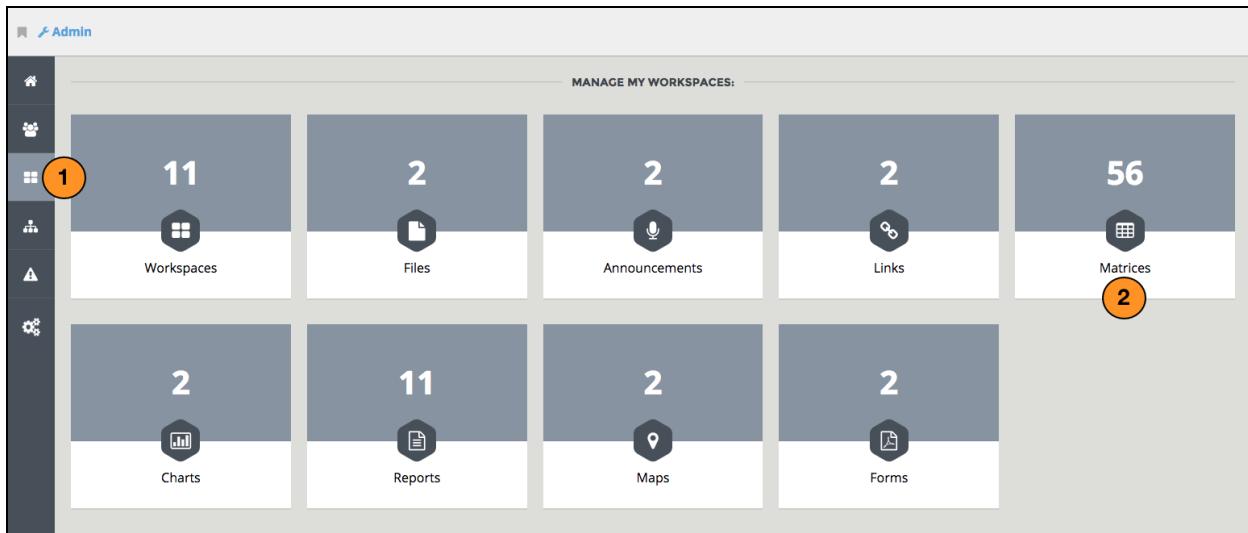


FIGURE 6-22: Matrices

FIGURE 6-23 shows the main **Matrices** page. This page lists the names of existing matrices. A Description, Parent Matrix, and Entity Group is defined for each.

MATRICES					
	Name	Description	Parent Matrix	Entity Group	Last Mod...
<input type="radio"/>	Biodosimetry	Matrix of all data to support the Biodo...		Biodosimetry	3/11/16 12:02
<input type="radio"/>	Contact Tracing Records	Matrix of all data to support the Cont...		Contact Record	3/11/16 12:02
<input type="radio"/>	Depreciation Category	Depreciation Category		RT_DepreciationCategory	3/11/16 12:02
<input type="radio"/>	Depreciation Class	Depreciation Classification		RT_DepreciationClass	3/11/16 12:02
<input type="radio"/>	Device Information	Matrix of all device information recor...		Device Information	3/11/16 12:02
<input type="radio"/>	Devices	Source for the Devices Map		Device Information	4/21/16 10:53
<input type="radio"/>	Event Patients			Patient Information	3/11/16 12:02
<input type="radio"/>	Field Interview	Matrix of all data to support the Field ...		Field Interview	3/11/16 12:02

FIGURE 6-23: Matrices Listing

6 - 4.1 Adding a Matrix

To add a new matrix, as shown in FIGURE 6-24:

1. Click or tap the **Create New Matrix** button.



FIGURE 6-24: Create New Matrix Button

The **Add Matrix** tool will display with the **Details** tab already selected, as shown in FIGURE 6-25.

1. Enter a **Name** for the new matrix and a **Description**, if desired.

Other options that can be selected include:

2. **Read Only**: The matrix can be set to read only by selecting this checkbox. If the box is checked, users will not be able to update data in the matrix, no matter what permissions the users have been given for the workspace(s) containing the matrix.
3. **Propagate Changes**: If this option is selected, then measures added to this matrix will also be added to any sub-matrices (or child matrices) that have been created directly from this matrix. Propagation does not flow through to children of children – that is, it will not go two (or more) levels down from this matrix.
4. **Locked**: By selecting this option, a matrix will be locked for editing so that measures cannot be added or taken from the matrix. A **Locked Reason** may also be entered.
5. **Display All Measures**: Selecting this option will ensure all available measures are displayed when a user opens this matrix. Unselecting this option will cause a matrix to only display the number of measures that fit in a user's display and the user will need to use the **Display** button to see the remaining measures.
6. **Default View**: The item selected in this list will be the first view a user sees when they select an entity to view from the matrix.

 A screenshot of the 'Add Matrix | Details' form. The top navigation bar includes 'Admin > Matrices > Add Matrix | Details', 'Save', and 'Back'. The form has several tabs: 'Details' (selected), 'Entity Group', 'Workspaces', 'Measures', 'Sorting', and 'Filtering'.
 - **General Section**: Contains fields for 'Name' (with a red circle '1' over it) and 'Description' (with a red circle '1' over it).
 - **Options Section**: Contains checkboxes for 'Read Only' (with a red circle '2' over it), 'Propagate Changes' (with a red circle '3' over it), and 'Locked' (with a red circle '4' over it). It also includes a dropdown for 'Display All Measures' (with a red circle '5' over it) and a dropdown for 'Default View' (with a red circle '6' over it).
 - **Side Panel**: Shows icons for Home, Entity Group, Workspaces, Measures, Sorting, Filtering, Save, and Back.

FIGURE 6-25: Add Matrix - Details

Next, select the entity group that contains the entities and measures for the matrix, as shown in FIGURE 6-26.

1. Click or tap the **Entity Group** tab to select a single entity group to use with the matrix (only one entity group may be assigned). An entity group must be added before continuing.
2. Click or tap the **Add Entity** button. Select an entity group. For more information, see "Selecting Items from an Available List" on page 8.

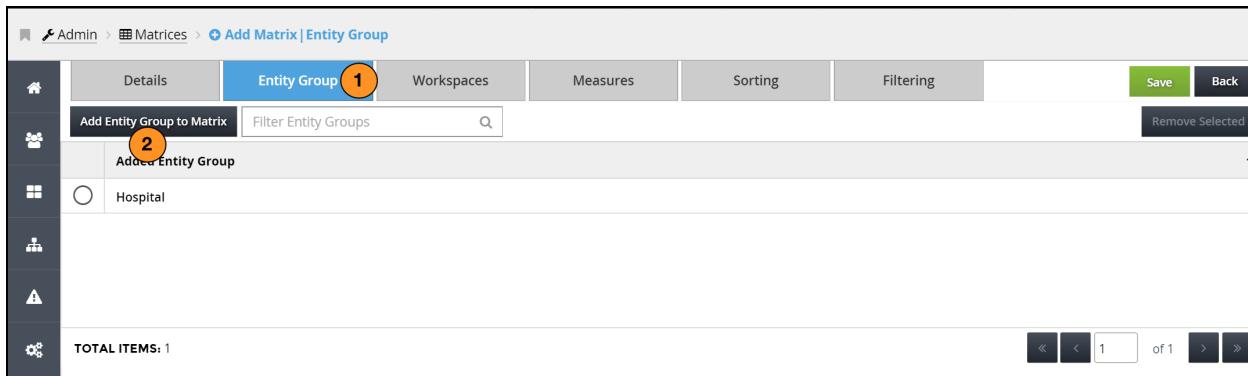


FIGURE 6-26: Add Matrix - Entity Group

Next, assign the matrix to a workspace, as shown in FIGURE 6-27.

1. Click or tap the **Workspaces** tab to add the matrix to workspaces.
2. Click or tap the **Add Workspaces** button. Add desired workspace(s) on this tab before proceeding. For more information, see "Selecting Items from an Available List" on page 8.

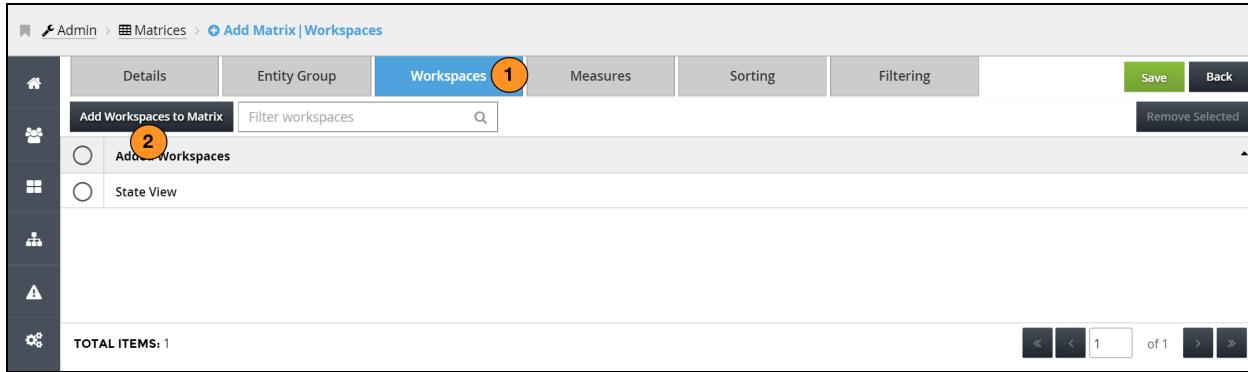


FIGURE 6-27: Add Matrix - Workspaces

Select the measures to include in the matrix, as shown in FIGURE 6-28.

1. Click or tap the **Measures** tab to see all current measures assigned to the matrix.
2. Click or tap the **Add Measures** button. Add measures to the matrix. For more information, see "Selecting Items from an Available List" on page 8.



Note: If the matrix being created has a parent matrix, only measures available in the parent matrix will be available for selection.

Once measures have been selected for the matrix, the remaining columns can be filled out.

3. **Aggregate Column:** In the **Aggregate** column, use the picklist to select a calculation to be performed on all values for a certain measure in a matrix. The value resulting from the calculation will be shown at the bottom of the column.
4. **Alternate Name Column:** Define **Alternate Names** for measures in this matrix only. Alternate names defined here are not shared with other matrices that contain the same measure.
5. **Is Hidden:** Select the **Is Hidden** circle if the measure should not be displayed in the matrix by default.
6. **Read Only:** The **Read Only** circle limits the measure for editing by users. Once selected, the measure can only be viewed by users.
7. **Column Order:** To change the order in which the measures appear in the matrix, *click or tap* the **up** and **down** arrows to reorder the measures to the desired sequence.

Measure	Aggregate	Alternate Name	Is Hidden	Read Only	Column Order
Patient ID	None				1
Triage Status	None				2
Age	Average				3
Gender	Count				4

FIGURE 6-28: Add Matrix - Measures

To specify sorting options, as shown in FIGURE 6-29:

1. *Click or tap* the **Sorting** tab to specify a **default sort** for the matrix.
2. *Click or tap* the **Add Measures** button. *Add* the measure(s) to specify a sort. For more information, see "Selecting Items from an Available List" on page 8.

Measure	Sort Direction	Sequence
Name	Ascending	1

FIGURE 6-29: Add Matrix - Sorting

To set a matrix filter, as shown in FIGURE 6-30:

1. Click or tap the **Filtering** tab to set a default filter on the matrix.
2. Click or tap the **Add Measures Filtering to Matrix** button. Add filtering options if necessary. For more information, see "Selecting Items from an Available List" on page 8.

Each item in the list consists of the **measure**, an **operator** to compare by, and some set of **values**. The operator and values will vary depending on the kind of data the measure contains.

3. Once a measure has been added to the list, click or tap the **operator** drop-down to select the filter.
4. Enter a value for the filter.
5. Select compound filtering operation **toggle**. This toggle will change between **AND** or **OR** operation.
 - **AND** - The matrix will filter and only show data that matches all these conditions.
 - **OR** - The matrix will filter and show any data that matches at least one of these conditions.

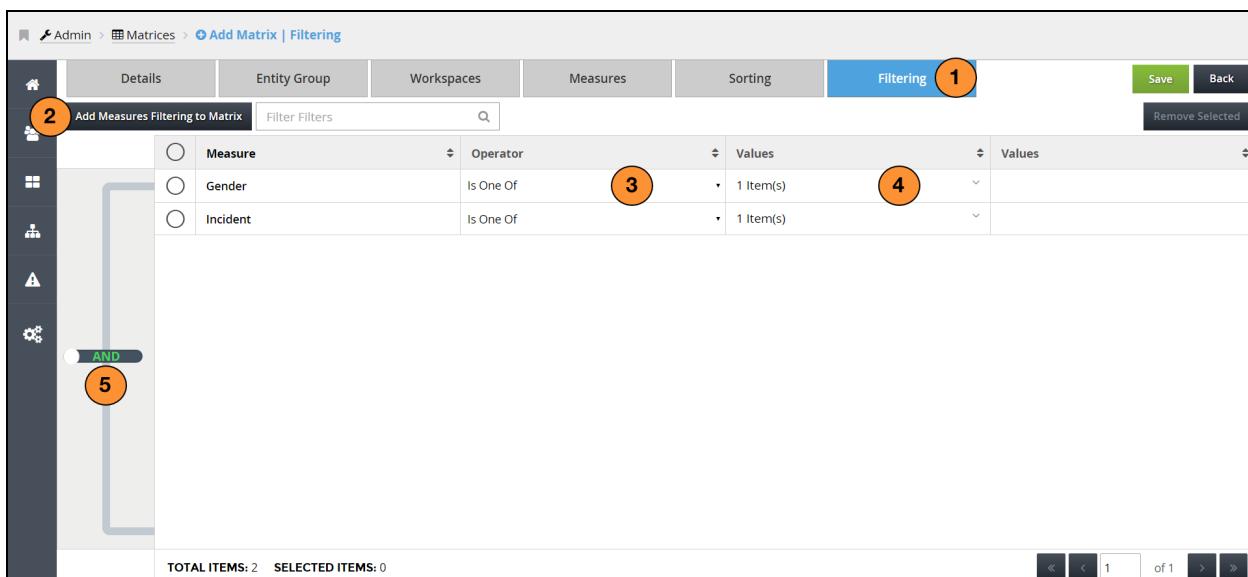


FIGURE 6-30: Adding a Matrix - Filtering

To exit the matrices tool, as shown in FIGURE 6-31:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-31: Save and Back buttons

6 - 4.2 Adding a SubMatrix

To add a new submatrix, as shown in FIGURE 6-32:

1. Click or tap the **Create New Matrix** button.



FIGURE 6-32: Create New Sub Matrix Button

The **Add Matrix** tool will display with the **Details** tab already selected, as shown in FIGURE 6-33.

1. Enter a **Name** for the new matrix and a **Description**, if desired.

Other options that can be selected include:

2. **Read Only**: The matrix can be set to read only by selecting this checkbox. If the box is checked, users will not be able to update data in the matrix, no matter what permissions the users have been given for the workspace(s) containing the matrix.
3. **Propagate Changes**: If this option is selected, then measures added to this matrix will also be added to any sub-matrices (or child matrices) that have been created directly from this matrix. Propagation does not flow through to children of children – that is, it will not go two (or more) levels down from this matrix.
4. **Locked**: By selecting this option, a matrix will be locked for editing so that measures cannot be added or taken from the matrix. A **Locked Reason** may also be entered.
5. **Display All Measures**: Selecting this option will ensure all available measures are displayed when a user opens this matrix. Unselecting this option will cause a matrix to only display the number of measures that fit in a user's display and the user will need to use the **Display** button to see the remaining measures.
6. **Default View**: The item selected in this list will be the first view a user sees when they select an entity to view from the matrix.

 A screenshot of a 'Add SubMatrix | Details' form. The top navigation bar shows 'Admin > Matrices > Add SubMatrix | Details'. The form has tabs for 'Details' (selected), 'Parent Matrix', 'Workspaces', 'Measures', 'Sorting', and 'Filtering'. On the left is a sidebar with icons for Home, General, Workspaces, Measures, Sort, Filter, and Save/Back. The 'General' section contains fields for 'Name' (with a red asterisk) and 'Description' (with a character count of 0/100). The 'Options' section contains checkboxes for 'Read Only' (highlighted with a red circle), 'Propagate Changes' (highlighted with a red circle), 'Locked' (highlighted with a red circle), 'Display All Measures' (highlighted with a red circle), and a dropdown for 'Default View' (highlighted with a red circle) set to 'Overview'.

FIGURE 6-33: Add SubMatrix - Details

Next, select the parent matrix that links this submatrix , as shown in FIGURE 6-34.

1. Click or tap the **Parent Matrix** tab to select a single matrix to use with the submatrix (only one matrix may be assigned). A matrix must be added before continuing.
2. Click or tap the **Select Parent Matrix** button. Select a matrix. For more information, see "Selecting Items from an Available List" on page 1.

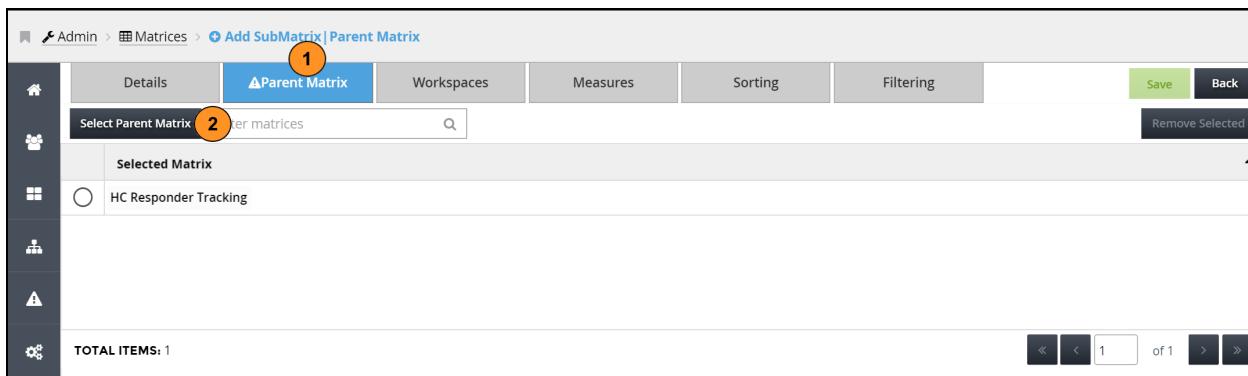


FIGURE 6-34: Add SubMatrix - Parent Matrix

Next, assign the matrix to a workspace Workspaces assigned to the parent matrix will appear by default, as shown in FIGURE 6-35.

1. Click or tap the **Workspaces** tab to add the matrix to workspaces.
2. Click or tap the **Add Workspaces** button. Add desired workspace(s) on this tab before proceeding. For more information, see "Selecting Items from an Available List" on page 1.

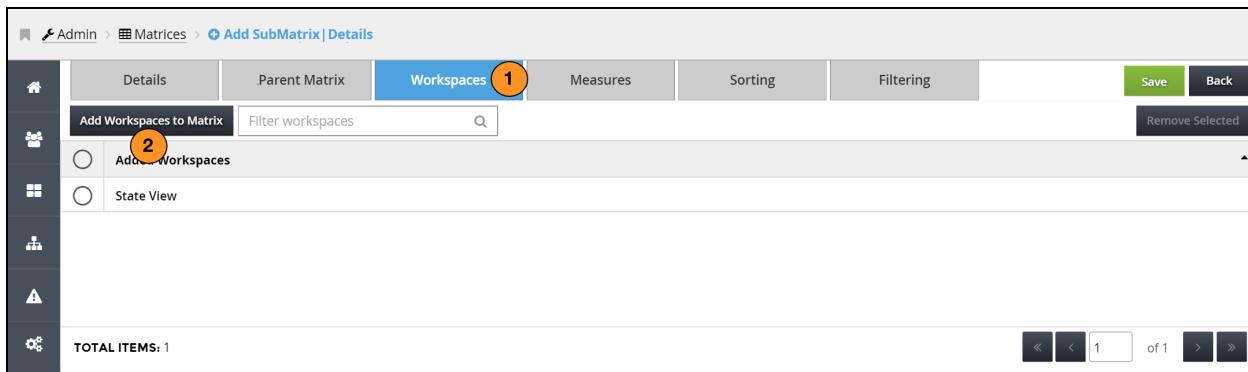


FIGURE 6-35: Add SubMatrix - Workspaces

Select the measures to include in the matrix, as shown in FIGURE 6-36.

1. Click or tap the **Measures** tab to see all current measures assigned to the matrix.
2. Click or tap the **Add Measures** button. Add measures to the matrix. For more information, see "Selecting Items from an Available List" on page 1.



Note: If the matrix being created has a parent matrix, only measures available in the parent matrix will be available for selection.

Once measures have been selected for the matrix, the remaining columns can be filled out.

3. **Aggregate Column:** In the **Aggregate** column, use the picklist to select a calculation to be performed on all values for a certain measure in a matrix. The value resulting from the calculation will be shown at the bottom of the column.
4. **Alternate Name Column:** Define **Alternate Names** for measures in this matrix only. Alternate names defined here are not shared with other matrices that contain the same measure.
5. **Is Hidden:** Select the **Is Hidden** circle if the measure should not be displayed in the matrix by default.
6. **Read Only:** The **Read Only** circle limits the measure for editing by users. Once selected, the measure can only be viewed by users.
7. **Column Order:** To change the order in which the measures appear in the matrix, *click or tap* the **up** and **down** arrows to reorder the measures to the desired sequence.

Measure	Aggregate	Alternate Name	Is Hidden	Read Only	Column Order
Measure	None		<input type="radio"/>	<input type="radio"/>	1
Patient ID	None		<input type="radio"/>	<input type="radio"/>	2
Address	None		<input type="radio"/>	<input type="radio"/>	3
Age	None		<input type="radio"/>	<input type="radio"/>	4
Allergies	None		<input type="radio"/>	<input type="radio"/>	

FIGURE 6-36: Add SubMatrix - Measures

To modify sorting options, as shown in FIGURE 6-37:

1. *Click or tap* the **Sorting** tab to specify a **default sort** for the matrix.
2. *Click or tap* the **Add Measures** button. *Add* the measure(s) to specify a sort. For more information, see "Selecting Items from an Available List" on page 1.

Sort Direction	Sequence
Ascending	1

FIGURE 6-37: Add SubMatrix - Sorting

To modify the matrix filter, as shown in FIGURE 6-38:

1. Click or tap the **Filtering** tab to set a default filter on the matrix.
2. Click or tap the **Add Measures Filtering to Matrix** button. Add filtering options if necessary. For more information, see "Selecting Items from an Available List" on page 1.

Each item in the list consists of the **measure**, an **operator** to compare by, and some set of **values**. The operator and values will vary depending on the kind of data the measure contains.

3. Once a measure has been added to the list, click or tap the **operator** drop-down to select the filter.
4. Enter a value for the filter.
5. Select compound filtering operation **toggle**. This toggle will change between **AND** or **OR** operation.
 - **AND** - The matrix will filter and only show data that matches all these conditions.
 - **OR** - The matrix will filter and show any data that matches at least one of these conditions.

Measure	Operator	Include Empty	Values	Values
Age	Equals		0	(4)
Gender	Is One Of		1 Item(s)	

FIGURE 6-38: Adding a SubMatrix - Filtering

To exit the submatrices tool, as shown in FIGURE 6-39:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.

FIGURE 6-39: Save and Back Buttons

6 - 4.3 Other Matrix Action(s)

One other action, delete, may be performed with matrices:

To perform this action on one or more matrices, as shown in FIGURE 6-40:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

MATRICES		Display	Search here		Create New Matrix	Create New Submatrix	Actions
Name	Description	Parent Matrix	Entity Group	Last Modified			
Arrest Information	Matrix of arrest information		HC MassArrest	4/10/15 7:16 PM			
1 Biodosimetry	Matrix of all data to support the Biol...		Biodosimetry	4/10/15 7:16 PM			

FIGURE 6-40: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-41.

1. **Add SubMatrix** starts the **Submatrix** tool with options from the selected matrix already applied.
2. **Export to HCML** is used by GER Technicians only.
3. **Delete** removes the matrix from the system.

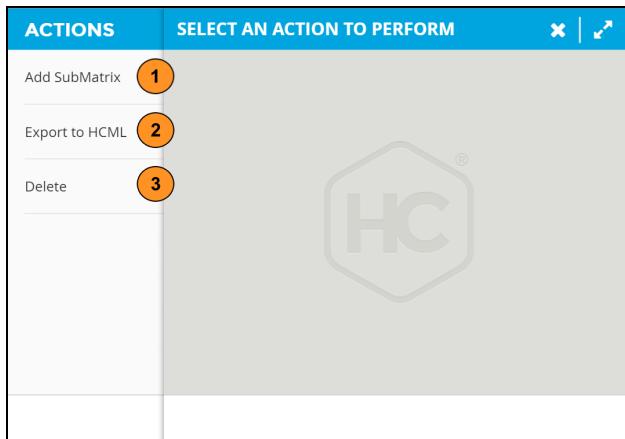


FIGURE 6-41: Matrices - Other Actions

6 - 5: Charts

The **Charts** tool presents the matrix data in a visual form.

To manage charts, as shown in FIGURE 6-42:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Charts** icon under the **Manage My Workspaces** section.

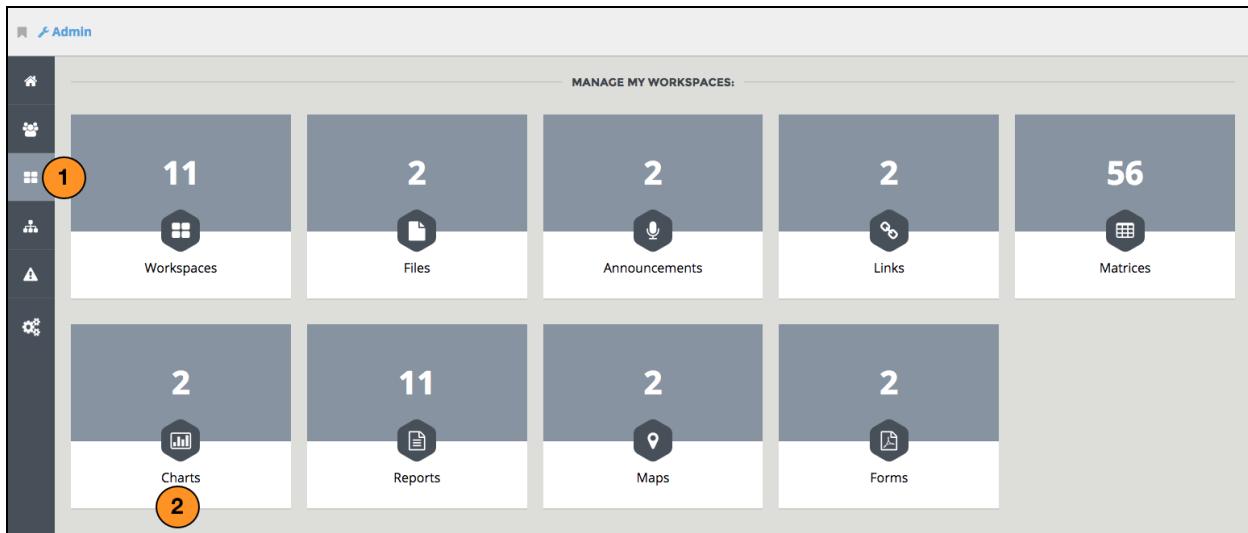


FIGURE 6-42: Charts

FIGURE 6-43 shows the main **Charts** page. This page lists all existing charts, a description (if available), and the type of chart for each.

The screenshot shows a table titled 'CHARTS' with columns: Name, Description, Matrix Name, Type Name, Workspaces, and Last Modified. The table contains three rows of data:

Name	Description	Matrix Name	Type Name	Workspaces	Last Modified
Event Patient Triage Status		Patient Information	Bar	1	3/16/15 2:57 PM
Triage count by location		Depreciation Class	Line	0	3/20/15 2:55 PM

At the bottom of the table, it says 'TOTAL ITEMS: 2 SELECTED ITEMS: 0'.

FIGURE 6-43: Charts Listing

6 - 5.1 Creating a New Chart

To add a new chart, as shown in FIGURE 6-44:

1. Click or tap the **Create New Chart** button.



FIGURE 6-44: Create New Chart Button

The **Add Chart** tool will display with the **Details** tab already selected, as shown in FIGURE 6-45.

1. Enter a **Name** and **Description** (if desired).

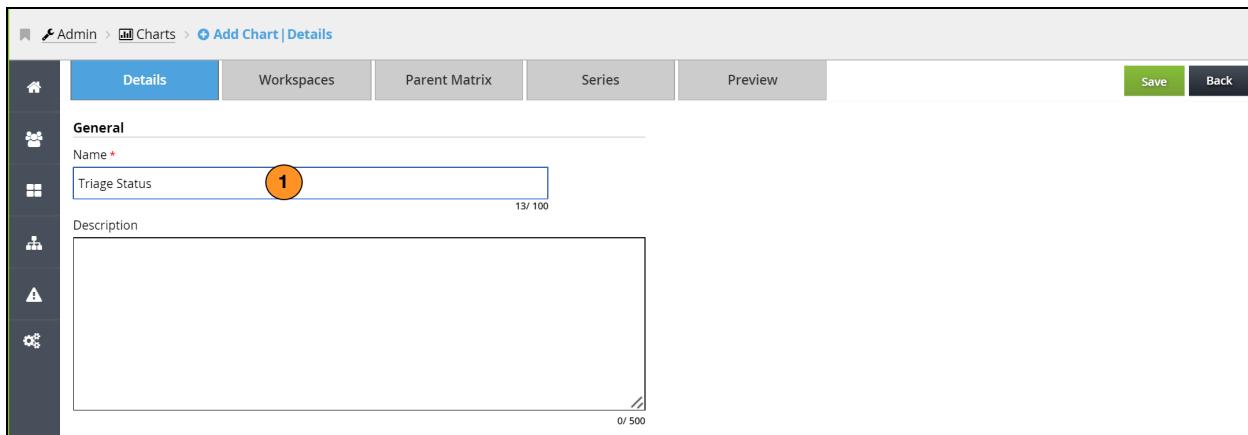


FIGURE 6-45: Add Chart - Details

To assign the chart to a workspace, as shown in FIGURE 6-46:

1. Click or tap the **Workspace** tab.
2. Click or tap the **Add Workspaces** button. Select workspaces from the available list. For more information, see "Selecting Items from an Available List" on page 8.

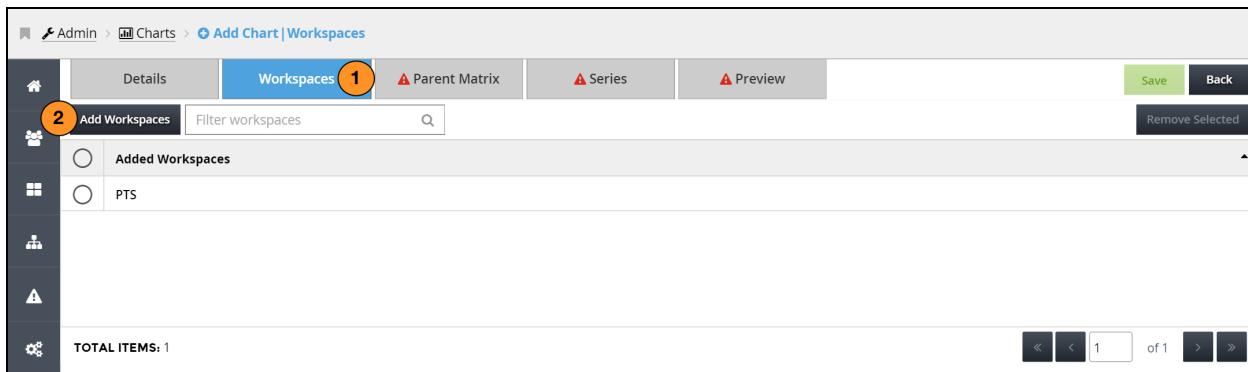


FIGURE 6-46: Charts - Workspaces

To select the matrix that contains the chart data, as shown in FIGURE 6-47:

1. Click or tap the **Parent Matrix** tab.
2. Click or tap **Select Parent Matrix** button. Select a matrix from the available list. For more information, see "Selecting Items from an Available List" on page 8.

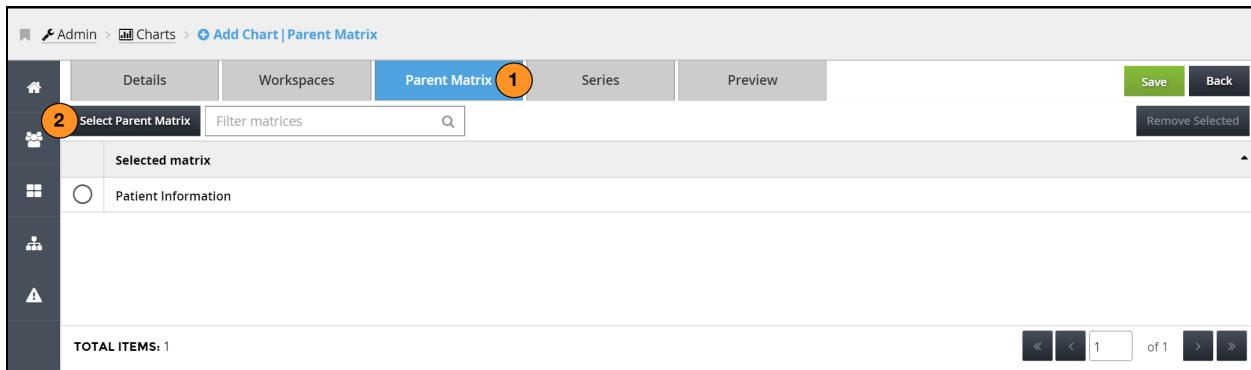


FIGURE 6-47: Charts - Parent Matrix

To customize the chart data, as shown in FIGURE 6-48:

1. Click or tap the **Series** tab.
2. Click or tap the **Add Series by Measure** button. Select the measure from the matrix. For more information, see "Selecting Items from an Available List" on page 8.
3. Select a **chart type**.
4. Determine the specific **color** of measure data.
5. Toggle grouping for each measure that will have their measure values combined into one bar or pie piece on the chart.
6. If more than one measure is being charted, a **series order** may be applied to specify which measure's data to display first in the chart.

For example if a numeric measure, like Age, is ungrouped, the chart will display each entity and their respective age. If Age is grouped, the chart will display each age and a count of how many entities have that age.

6. If more than one measure is being charted, a **series order** may be applied to specify which measure's data to display first in the chart.

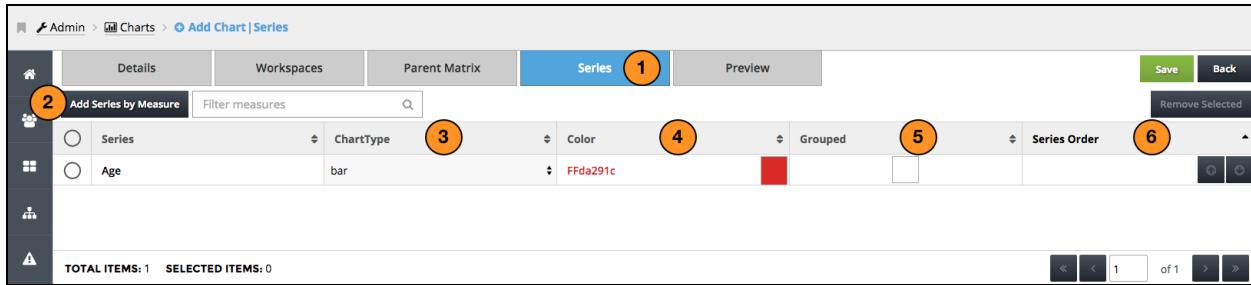


FIGURE 6-48: Creating a Chart - Series

To preview the chart, as shown in FIGURE 6-49:

1. Click or tap the **Preview** tab.

If further changes need to be made, *navigate* to the appropriate tabs at the top of the page to make the necessary changes.



FIGURE 6-49: Adding a Chart - Preview

To exit the charts tool, as shown in FIGURE 6-50:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-50: Save and Back buttons

6 - 5.2 Other Chart Action(s)

One other action, delete, can be performed with charts:

To perform this action on one or more charts, as shown in FIGURE 6-51:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

CHARTS						
	Name	Description	Matrix Name	Type Name	Workspaces	Last Modified
<input type="radio"/>	Event Patient Triage Status		Patient Information	Bar	1	3/16/15 2:57 PM
<input checked="" type="radio"/> 1	Page count by location		Depreciation Class	Line	0	3/20/15 2:55 PM

FIGURE 6-51: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-52.

1. **Delete** removes the chart from the system.

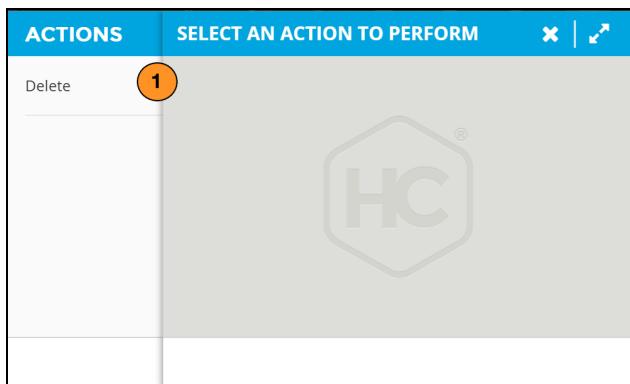


FIGURE 6-52: Charts - Other Actions

6 - 6: Reports

Reports present the data in a visual manner and add a title and other formatting that make them more suitable for printing. Reports take a "snapshot" of data and time stamp it the moment it is run. Once run, reports can be printed, or exported in various file formats.

To view existing reports, as shown in FIGURE 6-53:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Reports** icon under the **Manage My Workspaces** section.

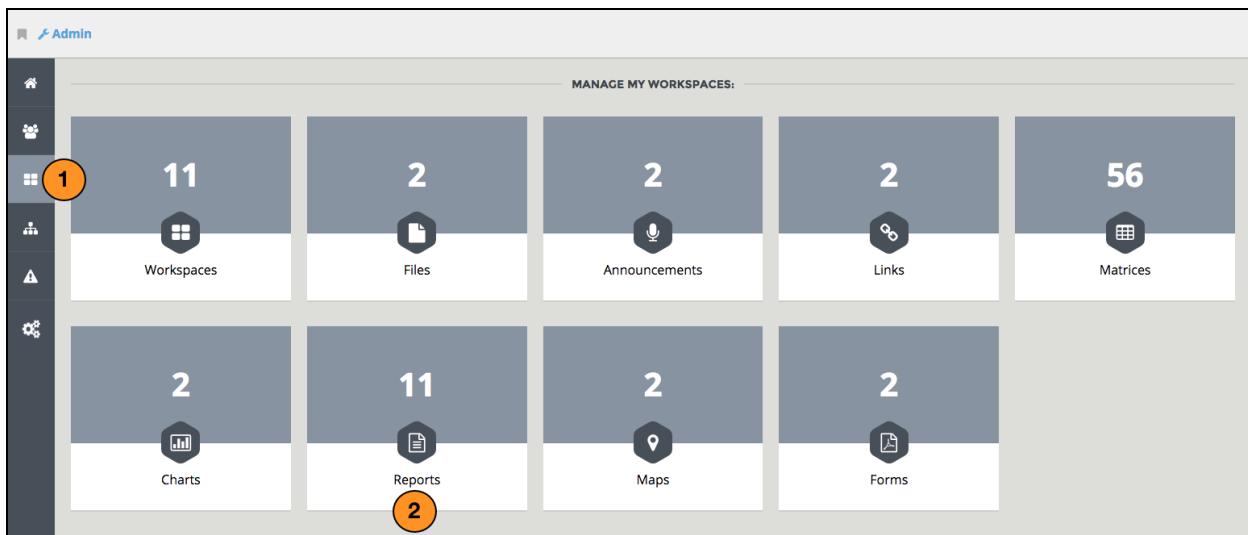


FIGURE 6-53: Reports

FIGURE 6-54 shows the main **Reports** page and lists all existing reports, and a description (if available) for each.

There are no Admin functions within the **Reports** tool. To add an existing report to a workspace, see "Workspaces" on page 102.

REPORTS					Display	Search here	Actions
	Name	Description	Workspaces	Last Modified			
<input type="radio"/>	Hospitals A+	Report showing the hospitals A+ chart	0	10/22/13 11:38 AM			
<input type="radio"/>	Hospitals Blood	Report of all hospitals blood supply	2	10/22/13 11:38 AM			
<input type="radio"/>	Incident Summary NEW	New version of the Incident Summary Report	3	11/10/14 4:42 PM			
<input type="radio"/>	Incident Summary Report	Incident Summary Report	6	2/21/14 2:17 PM			
<input type="radio"/>	Measure Modification NEW	New version of the Measure Modification Report	2	11/14/14 3:19 PM			
<input type="radio"/>	Measure Modification Report	Measure Modification Report	1	10/22/13 11:43 AM			
<input type="radio"/>	Multi-Casualty Branch Manager NEW	New version of the Multi-Casualty Branch Manager Report	3	11/10/14 4:42 PM			
<input type="radio"/>	Multi-Casualty Branch Manager Report	Multi-Casualty Branch Manager Report	4	2/21/14 2:29 PM			

TOTAL ITEMS: 34 SELECTED ITEMS: 0

FIGURE 6-54: Reports Listing

6 - 7: Maps

Maps associate data with geographical locations. The ability to view data visually on a map is an invaluable tool. Critical statuses such as Hospital Status, Blood Availability, and Pharmaceuticals can all be mapped out.

To manage maps, as shown in FIGURE 6-55:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Maps** icon under the **Manage My Workspaces** section.

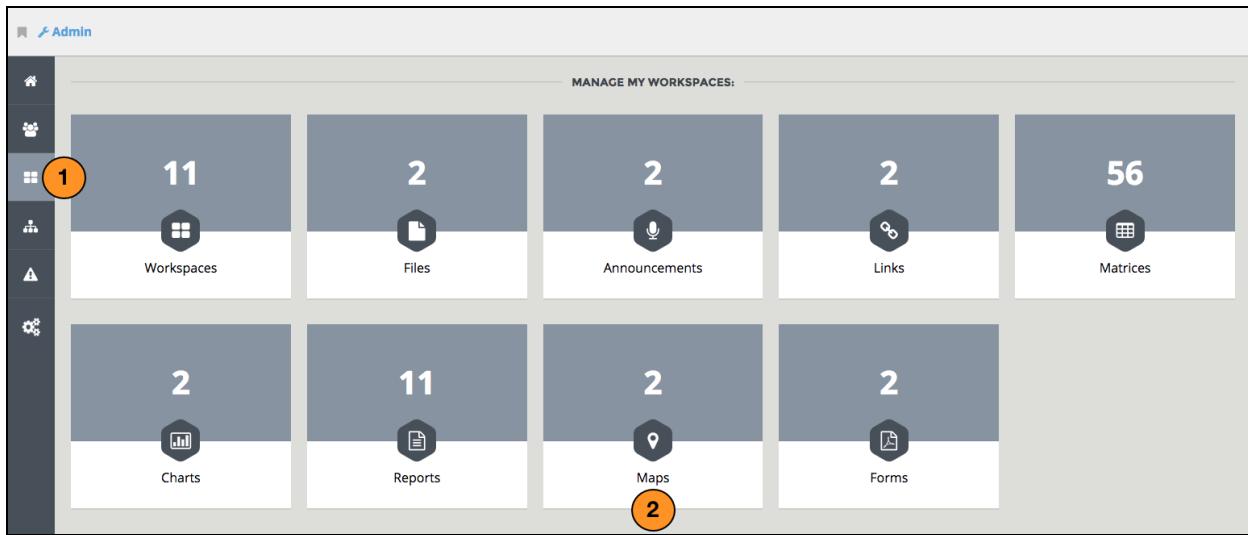


FIGURE 6-55: Maps

FIGURE 6-56 shows the main **Maps** page. This page lists all existing maps.

The screenshot shows a table titled 'MAPS' with the following data:

Name	Workspaces	Last Modified
Devices	2	3/12/15 11:11 AM
Patients	1	9/23/14 4:16 PM
Total Items: 2 Selected Items: 0		

FIGURE 6-56: Maps Listing

6 - 7.1 Creating a New Map

To add a new map, as shown in FIGURE 6-57:

1. Click or tap the **Create New Map** button.



FIGURE 6-57: Create a New Map Button

The **Add Map** tool will display with the **Details** tab already selected, as shown in FIGURE 6-58.

1. Enter a **Name** and a brief **Description**, if desired.

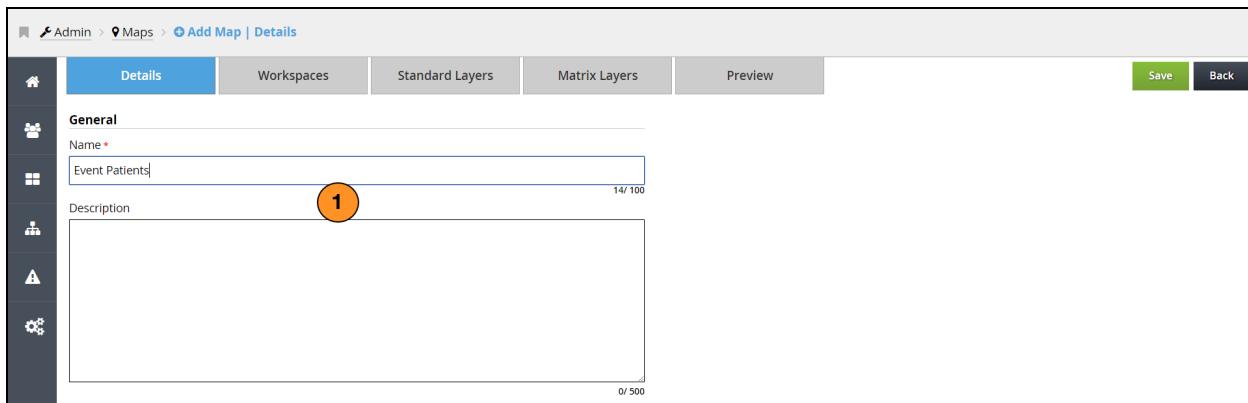


FIGURE 6-58: Add Map - Details

To assign the map to a workspace, as shown in FIGURE 6-59:

1. Click or tap on the **Workspaces** tab to add a workspace to the map.
2. Click or tap **Add Workspaces** button. Assign one or more workspaces to the map. For more information, see "Selecting Items from an Available List" on page 8.

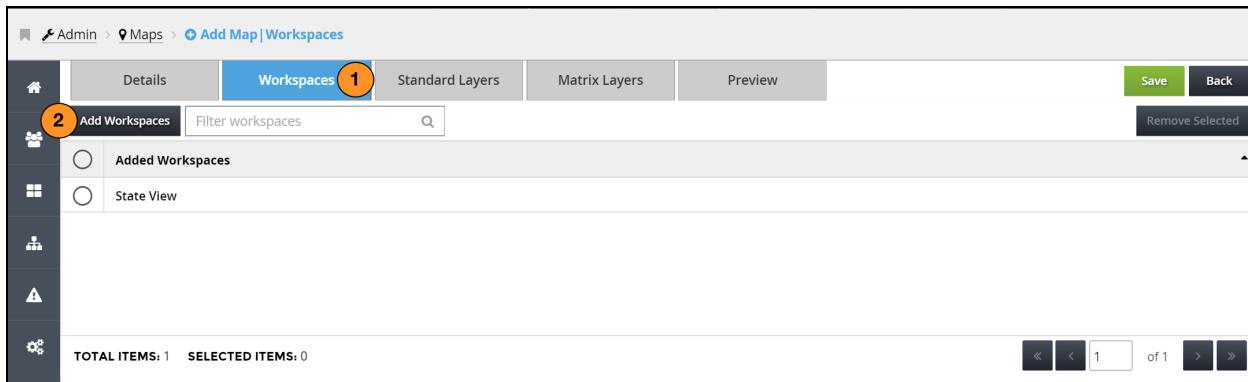


FIGURE 6-59: Add Map - Workspaces

To include overlays in addition to matrix data, such as weather radar or time zone, as shown in FIGURE 6-60:

1. Click or tap the **Standard Layers** tab.
2. Click or tap the **Add Standard Layers** button. Select any **Standard Layers** that should be included in the map. For more information, see "Selecting Items from an Available List" on page 8.

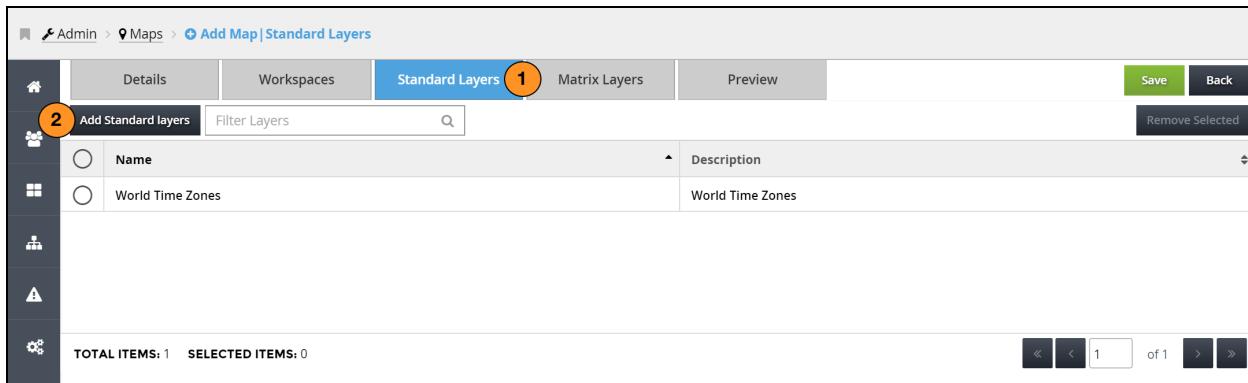


FIGURE 6-60: Adding a Map - Standard Layers

To determine matrix data that should be included on the map, as shown in FIGURE 6-61:

1. Click or tap the **Matrix Layers** tab.
2. Click or tap the **Select Parent Matrix** button. Add a **parent matrix** or multiple **matrices** that contain the data that is to be mapped. For more information, see "Selecting Items from an Available List" on page 8.
3. Use the **Icon** column to set customized icons for each map layer.
4. Use the **Measures** column to set what kind of measure information will be displayed with the location data (this information will be displayed when a location is *clicked/tapped*).

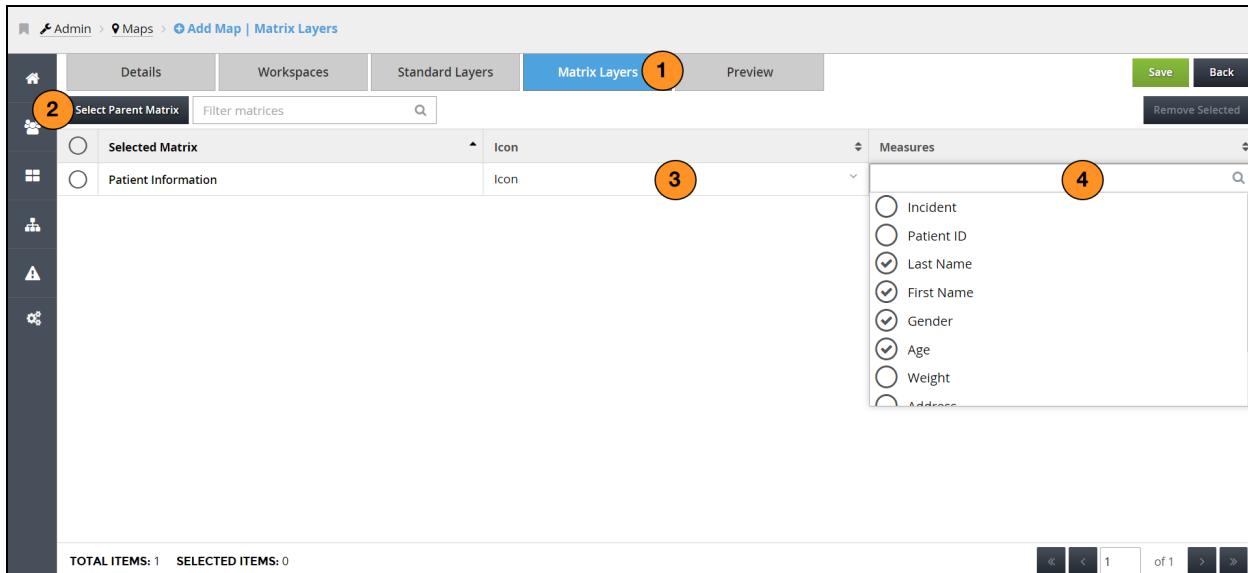


FIGURE 6-61: Add a Map - Matrix Layers

To preview the map, as shown in FIGURE 6-62:

1. Click or tap the **Preview** tab.

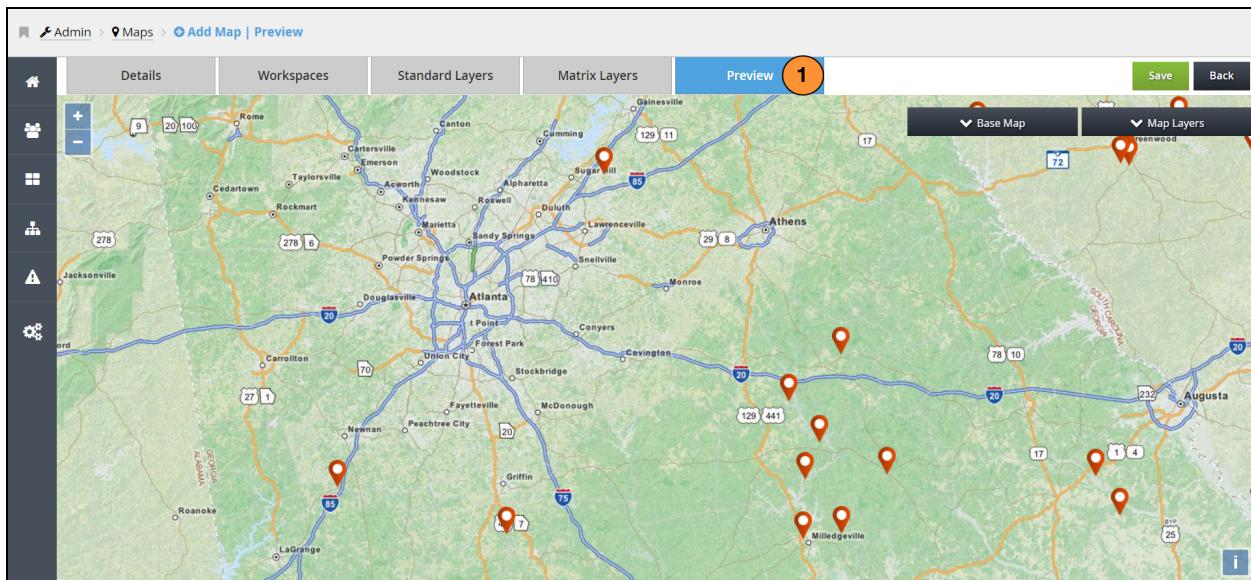


FIGURE 6-62: Create a New Map - Preview

To exit the maps tool, as shown in FIGURE 6-63:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-63: Save and Back buttons

6 - 7.2 Other Map Action(s)

One other action, delete, may be performed with maps:

To perform this action on one or more maps, as shown in FIGURE 6-64:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

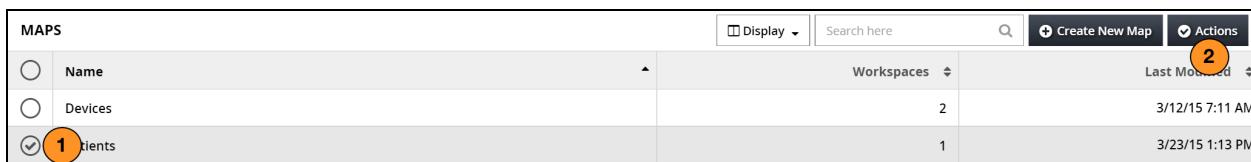


FIGURE 6-64: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-65.

1. **Delete** removes the map from the system.

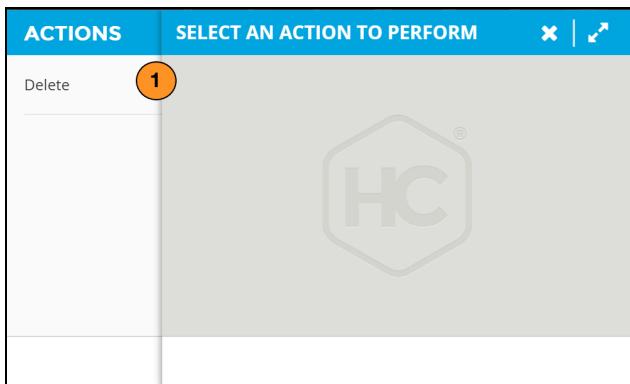


FIGURE 6-65: Maps - Other Actions

6 - 8: Forms

The **Forms** tool allows data to be input into a matrix using a PDF form. This custom interface is created for data input.

To manage forms, as shown in FIGURE 6-66:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Forms** icon under the **Manage My Workspaces** section.

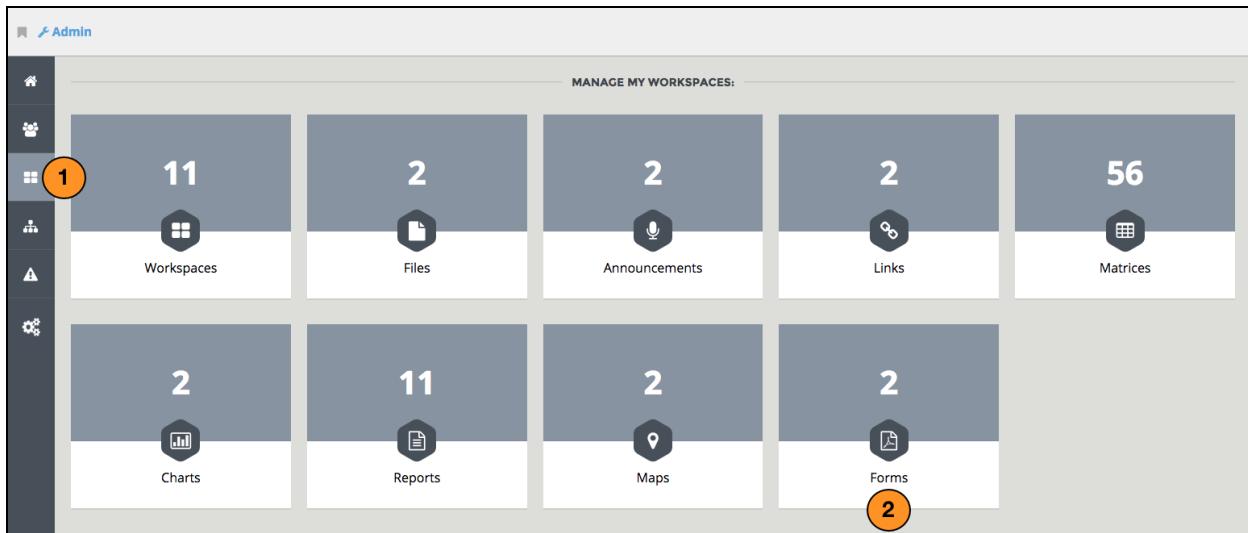


FIGURE 6-66: Forms

FIGURE 6-67 shows the main **Forms** page. This page lists all existing forms in the system.

FORMS									
	Name	Description	Mapping...	Mapping Name	Form File...	File Name	Entity ID	Matrix	Matrix Vi...
<input type="radio"/>	Ebola Preparedness Q...	Ebola Preparedness Q...	2	Ebola Preparedness Q...	5443	Sample Form4_fillable...	-1	2632	2539 3/4
<input type="radio"/>	New Ebola Preparedn...		2	Ebola Preparedness Q...	5443	Sample Form4_fillable...	39534	2632	2539 3/4

TOTAL ITEMS: 2 SELECTED ITEMS: 0

FIGURE 6-67: Forms Listing

6 - 8.1 Creating a New Form

To add a new form, as shown in FIGURE 6-68:

1. Click or tap the **Create Form** button.



FIGURE 6-68: Create a New Form Button

The **Add Form** tool will display with the **Details** tab already selected, as shown in FIGURE 6-69.

1. *Enter a Name* and a brief **Description** (if desired).
2. *Select an existing Form Mapping*. For more information, see "Form Mapping" on page 64.
3. The **Entity** drop-down is a filtered list of entities from the matrix that was used to map the form fields. There are two admin options:
 - *Leave the Entity field blank* - This means that each time the form is submitted, a new entity is created with the submitted information.
 - *Select a specific Entity* - This means that this specific form will only update the information for the selected entity.

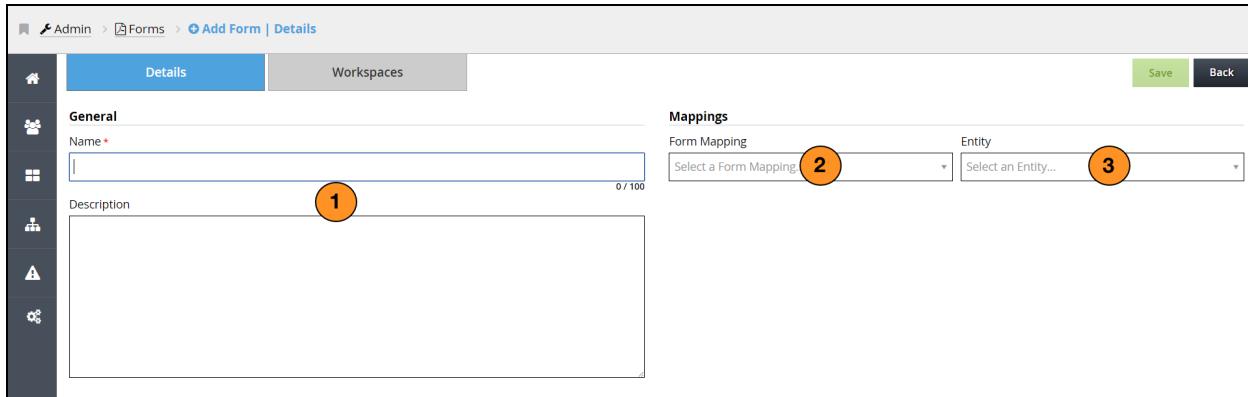


FIGURE 6-69: Add Form - Details

To assign the form to a workspace, as shown in FIGURE 6-70:

1. *Click or tap the Workspace tab.*
2. *Click or tap the Add Workspaces button. Select workspaces from the available list. For more information, see "Selecting Items from an Available List" on page 8.*



FIGURE 6-70: Add Form - Workspaces

To exit the forms tool, as shown in FIGURE 6-71:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-71: Save and Back buttons

6 - 8.2 Other Forms Action(s)

Other actions may be performed with forms including deleting a form and downloading a form.

To perform either of these actions on a form, as shown in FIGURE 6-72:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

FORMS										<input type="button" value="Display"/>	<input type="text" value="Search here"/>	<input type="button" value="Create Form"/>	<input checked="" type="checkbox"/> Actions	
	Name	Description	Mapping Name	File Name	Entity ID	Matrix Name	CreatedOn	ModifiedOn						
<input type="radio"/>	NDMS Bed Counts		Hospital Status Form	CERF - HRF Pre-Entry an...	-1	Device Information	5/7/15 1:02 PM	5/7/15						
<input checked="" type="radio"/>	1 Client Triage Form		Hospital Status Form	CERF - HRF Pre-Entry an...	-1	Device Information	3/17/15 2:29 PM	3/25/15						

FIGURE 6-72: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-73.

1. **Delete** removes the form from the system.
2. **Download** will download the form PDF.

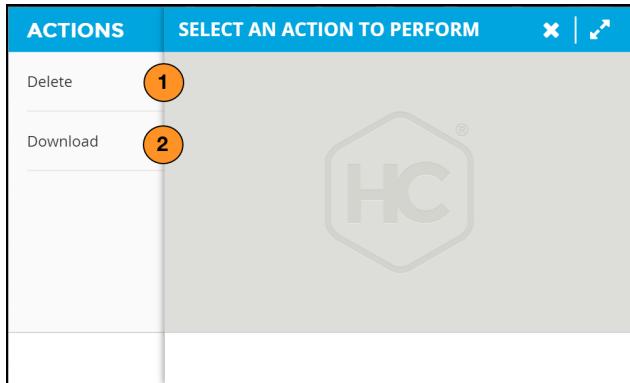


FIGURE 6-73: Forms - Other Actions

6 - 9: Workspaces

The Workspaces tool allows the creation of workspaces, management of workspace content and access to view and update those contents. Once various user groups, matrices, charts, reports, maps, announcements, links, and files, have been established, the workspace area aids in determining which groups have access to particular workspaces, and exactly what the user(s) can do in the workspace.

To manage workspaces, as shown in FIGURE 6-74:

1. Click or tap on the **Workspaces & Workspaces Items** icon.
2. Click or tap on the **Workspaces** icon under the **Manage My Workspaces** section.

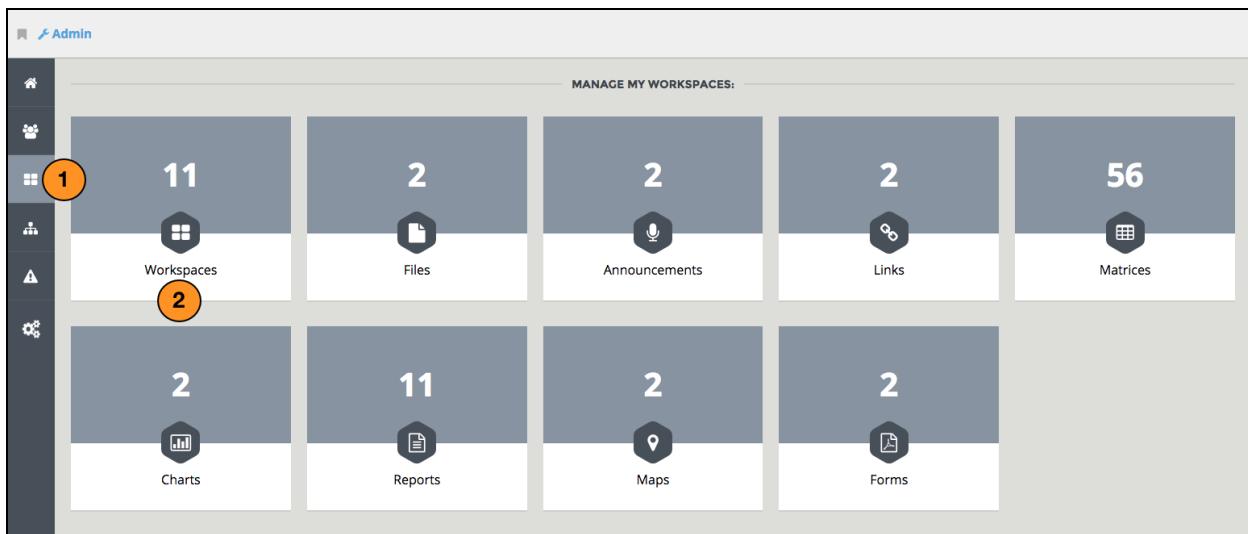


FIGURE 6-74: Workspaces

FIGURE 6-75 shows the main **Workspaces** page. This page lists all workspaces previously created and allows the user to create new workspaces.

The screenshot shows a table titled 'WORKSPACES' with the following columns: Name, Description, and Last Modified. The table lists eight workspaces:

Name	Description	Last Modified
Admin	Admin	10/23/14 3:11 PM
Device Management	Device Management Workspace	3/12/15 11:11 AM
Field Interview	Field Interview	3/12/15 11:16 AM
ICS	Incident Commander	3/12/15 11:12 AM
Mortuary Affairs	Mortuary Affairs	3/12/15 11:16 AM
PTS	Patient Tracking	3/12/15 11:12 AM
Resource Tracking	Workspace for testing Resource Tracking	3/12/15 11:16 AM
State View	Workspace for a state	3/16/15 7:31 PM

TOTAL ITEMS: 8 SELECTED ITEMS: 0

FIGURE 6-75: Workspaces List

Creating a new workspace involves, at minimum, adding three sets of information:

- **Details:** The name and description of the workspace.
- **Items:** Some areas of information to be used in the workspace (e.g. matrices, reports, maps, etc.)
- **Groups:** The users who will use the workspace and the actions the users are allowed to take.

6 - 9.1 Creating a Workspace

To create and configure a new workspace, as shown in FIGURE 6-76:

1. Click or tap the **Create New Workspace** button.



FIGURE 6-76: Create Workspaces Button

The **Create New Workspace** tool will display with the **Details** tab already selected, as shown in FIGURE 6-77.

1. Enter a **workspace name** and **add a description**, if desired.

 A screenshot of the 'Create New Workspace | Details' form. On the left is a sidebar with icons for Home, Groups, Matrices, Announcements, Links, Maps, Reports, Files, and Charts. The 'Details' tab is selected and highlighted in blue. The main area shows a 'General' section with a 'Workspace Name' field containing 'Hospital Workspace' and a 'Description' field containing 'This workspace will be used by hospital users only.' Both fields have a character count indicator (18 / 100 and 51 / 250). A red circle with the number '1' is placed over the 'Description' field. At the top right are 'Save' and 'Back' buttons.

FIGURE 6-77: Create New Workspace - Details

To add items and assign permissions to a workspace click or tap the tabs along the top of the **Create New Workspace** tool to add the desired item or items.

In the series below of example steps, user groups are assigned to a workspace, and a matrix and report are added as workspace items. The process for adding other workspace items (Announcements, Links, Maps, Files, and Charts) is the same as adding a matrix or report.

FIGURE 6-78 is an example of assigning permissions so that groups have access to see and use the information contained in the workspace. In this example, **Admins** can both read and write to anything in the workspace. The **PTS Users** group members can read, but cannot make changes to, items in the workspace.

1. Click or tap the **Groups** tab.
2. Click or tap the **Add Groups** button. Select a User Group from the available list. For more information, see "Selecting Items from an Available List" on page 8.

Groups	Permission Set
Groups	Read Only
Admins	ReadWrite
PTS Users	Read Only

TOTAL ITEMS: 2 SELECTED ITEMS: 0

FIGURE 6-78: Create a Workspace - Groups

Select the appropriate permission for each user group, as shown in FIGURE 6-79.

1. Select the desired permission for each user group added to the workspace.

ACTIONS	SELECT DEFAULT PERMISSIONS
Set Permissions	Read Only <input checked="" type="radio"/> Read/Write <input type="radio"/>

No Yes

FIGURE 6-79: Create Workspace - Set Permission

The next step in the process of creating a workspace, involves adding workspace items to the workspace. In the example in FIGURE 6-80, the **Patient Information** matrix has been added to the **Workspace Matrices** list.

1. Click or tap the **Matrices** tab.
2. Click or tap the **Add Matrices** button. Select a **matrix** from the available list. For more information, see "Selecting Items from an Available List" on page 8.

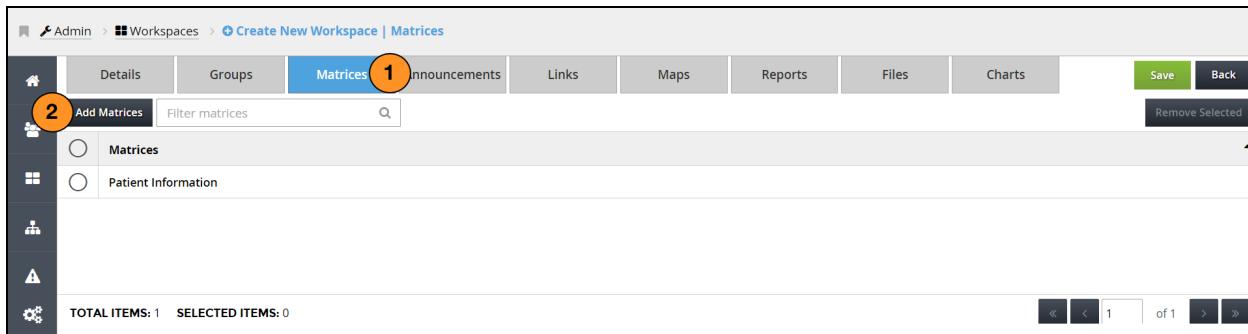


FIGURE 6-80: Create a Workspace - Matrices

In FIGURE 6-81, the **Incident Summary** report has been added into the **Workspace Reports** list.

1. Click or tap the **Reports** tab.
2. Click or tap the **Add Reports** button. Select a **report** from the available groups. For more information, see "Selecting Items from an Available List" on page 8.

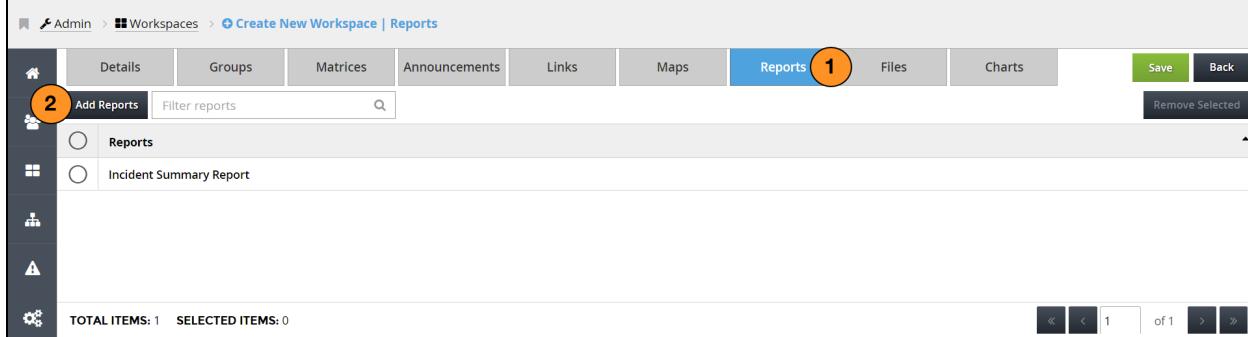


FIGURE 6-81: Create a Workspace - Reports

To exit the workspace tool, as shown in FIGURE 6-82:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.



FIGURE 6-82: Save and Back buttons

6 - 9.2 Other Workspace Action(s)

One other action, delete, may be performed with workspaces:

To perform this action on one or more workspaces, as shown in FIGURE 6-83:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

WORKSPACES		
	Description	Last Modified
<input type="radio"/>	Name	
<input checked="" type="radio"/> 1 min	Admin	10/23/14 11:11 AM
<input type="radio"/>	Biodosimetry	4/10/15 7:16 PM

FIGURE 6-83: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 6-84.

1. **Delete** removes the workspace from the system.

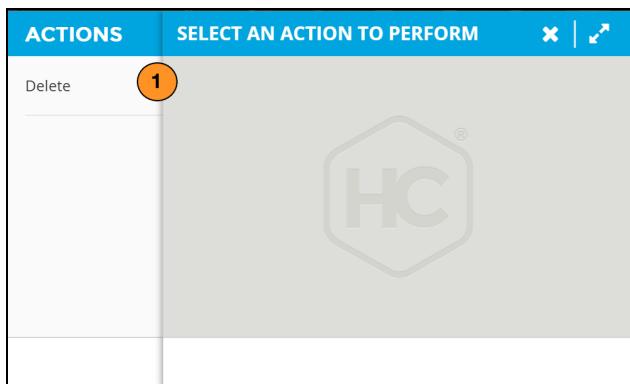


FIGURE 6-84: Workspaces - Other Actions

Chapter 7 - Notifications and System Security Services

In the Healthcare and Emergency Services environment, there are many cases where groups and organizations need to get information quickly. Whether a state administrator is notifying all hospitals to expect a possible surge in patients due to a mass casualty incident or a transport officer is organizing a long term care facility evacuation, the ability to send a notification to a designated group proves invaluable. Additional system logs and security audit services are grouped in this section. FIGURE 7-1 shows the **Notifications** category.

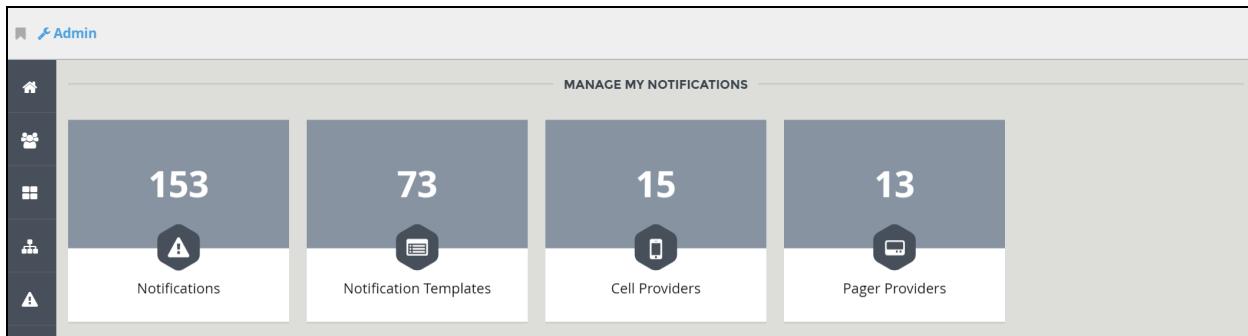


FIGURE 7-1: Notifications

Notifications allow an Admin to communicate directly with users or user groups via e-mail, text messages, alphanumeric page, and/or directly within HC Standard®.

The notification tools allow an Admin to send **Notifications**, create **Notification Templates**, and manage **Cellular** and **Pager Providers**.

7 - 1: Notifications

Notification tools aid in the creating and managing of messages from the Admin. Messages can be created, saved as templates, and sent to any combination of users and groups via HC Standard®, e-mail or SMS text.

To manage notifications, as shown in FIGURE 7-2:

1. Click or tap on the **Notifications & Templates** icon.
2. Click or tap on the **Notifications** icon under the **Manage My Notifications** section.

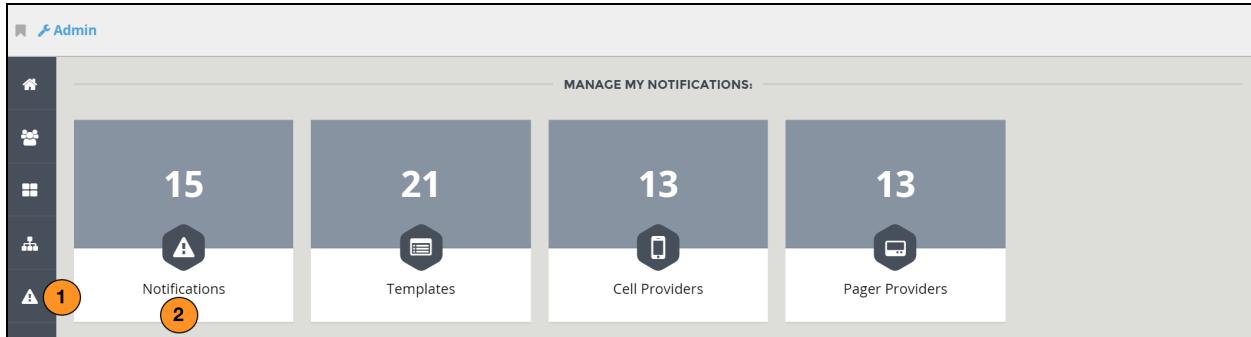


FIGURE 7-2: Notifications

FIGURE 7-3 shows the main notifications page. This page lists all notifications previously created and sent. It also allows for a new notification to be sent.

NOTIFICATIONS						Display	Filter	Search here	Send	Actions
<input type="radio"/>	Subject	Messages	Acknowledged	Sent By	Message	Last Modified				
<input type="radio"/>	Update Bed Status	4	1	Training User	Please update bed status immediately.	3/16/15 7:40 PM				
<input type="radio"/>	Cancelled - test	1	1	Training User	asdf	3/16/15 7:40 PM				
<input type="radio"/>	test	1	1	Training User	asdf	3/12/15 7:22 PM				
TOTAL ITEMS: 3 SELECTED ITEMS: 0										

FIGURE 7-3: Notifications List

7 - 1.1 Sending Notifications

A notification can be sent to any combination of groups, workspaces and users. When sending a notification to a group or workspace, all users in the group or workspace are notified. The basic steps to create a new notification involve:

- **Creating** the notification content.
- **Choosing** the groups, users and workspaces that should receive the notification.
- **Sending** the notification.

To create a new notification, as shown in FIGURE 7-4:

1. Click or tap the **Send** button.



FIGURE 7-4: Send Notification Button

FIGURE 7-5 shows the **Create Notification** dialog.

1. Click or tap the **Start Wizard** button.

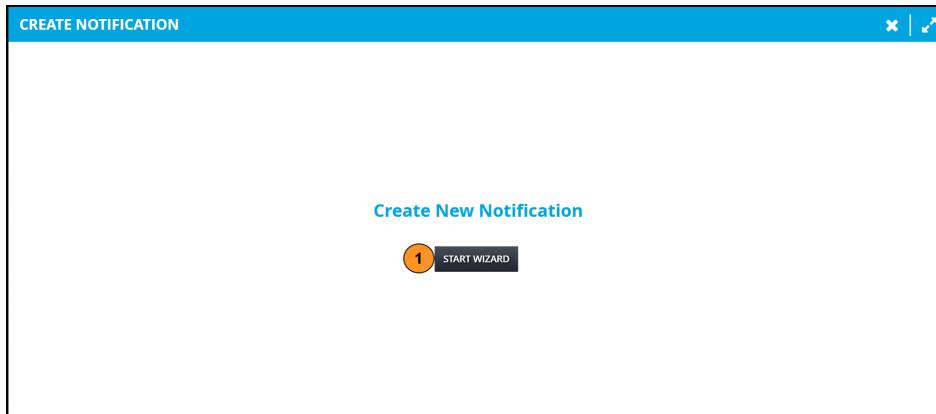


FIGURE 7-5: Create Notification

Enter the notification options, as shown in FIGURE 7-6:

1. **UncheckRequires user input.**
2. **Select the Notification Type.**
3. **Enter the Notification Subject.**
4. **Enter the Message.**
5. **Click or tap the Next button.**

FIGURE 7-6: Create New Notification - Step 1

To select any combination of recipients, as shown in FIGURE 7-7:

1. **Click or tapWorkspaces, Groups, or Users.**
2. **Search for recipients.**
3. **Select desired recipients.**
4. **Click or tap the Send button when ready to send the notification.**

FIGURE 7-7: Create Notification - Step 2

7 - 1.2 Sending a Notification with a request for matrix-based input

Users with the appropriate permission are able to send notifications to other users or workspaces.

To send a notification that requires user input to update a matrix, as shown in FIGURE 7-8:

1. Click or tap the **Send** button.



FIGURE 7-8: Notification Bar

FIGURE 7-9 shows the **Create Notification** dialog.

1. Click or tap the **Start Wizard** button.

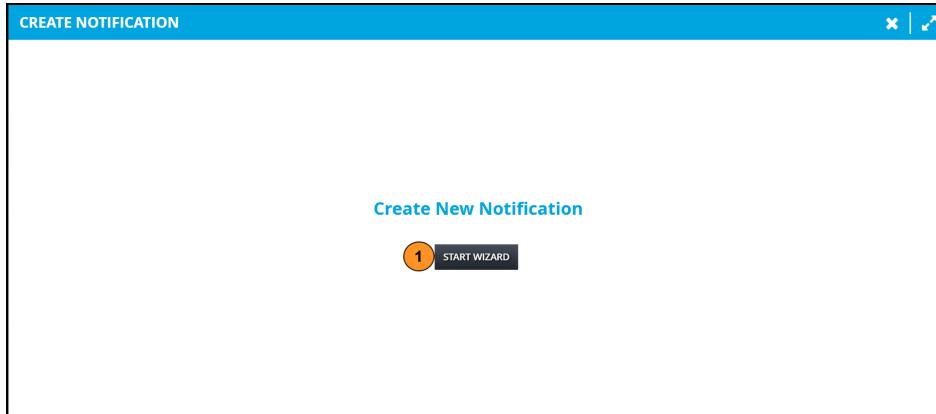


FIGURE 7-9: Create Notification

Enter the notification options, as shown in FIGURE 7-10:

1. Click or tap **Requires user input** to place a check.
2. Enter the **Due Date** if **Requires user input** is checked.
3. Select the **Notification Type**.
4. Enter the **Notification Subject**.
5. Enter the **Message**.
6. Click or tap the **Next** button.

FIGURE 7-10: Create New Notification - Step 1

Select the matrix that users need to update, as shown in FIGURE 7-11:

1. Search for the **matrix**.
2. Select the desired **matrix**.
3. Click or tap the **Next** button.

FIGURE 7-11: Create Notification - Step 2

Select the measures that users will update, as shown in FIGURE 7-12:

1. Search for **measures**.
2. Select desired **measure(s)**.
3. Click or tap the **Next** button.

The screenshot shows the 'CREATE NEW NOTIFICATION - STEP 3 OF 4' window. At the top, it says 'Required input details' and 'Selected matrix: Patient Information'. Below that, under 'Select measures:', there is a search bar labeled 'Search measures' (marked with orange circle 1). To its right is a list of measures: Departure Time, Arrival Time, Respirations, Pulse, Systolic, and Diastolic. On the left, there is a list of patient information fields: Incident, Patient ID, Last Name, First Name, Gender, and Age (marked with orange circle 2). At the bottom right are 'BACK' and 'NEXT' buttons (marked with orange circle 3).

FIGURE 7-12: Create Notification - Step 3

To select any combination of recipients, as shown in FIGURE 7-13:

1. Click or tap **Workspaces**, **Groups**, or **Users** to select any combination of recipients.
2. Search for **recipients**.
3. Select desired **recipients**.
4. Click or tap the **Send** button when ready to send the notification.

The screenshot shows the 'CREATE NEW NOTIFICATION - STEP 4 OF 4' window. At the top, it says 'Required input details' and 'Selected recipients:'. There are three tabs: 'Workspaces' (marked with orange circle 1), 'Groups', and 'Users'. Below that is a search bar labeled 'Search workspaces' (marked with orange circle 2). To its right is a list of workspaces: Admin (marked with orange circle 3) and Device Management. At the bottom right are 'BACK' and 'SEND' buttons (marked with orange circle 4).

FIGURE 7-13: Create Notification - Step 4



Important! Only users that have read/write access to the matrix will receive the notification.

7 - 1.3 Sending a Notification with a request for Access Rule-based input

One of the notification options are to use Access Rules which allows certain users to only edit certain entities in a notification request. If Access Rules have been configured by an administrator, then users with the appropriate permissions may send Access Rule-based notifications to other users.

To send a notification that requires user input to update based on an Access Rule, as shown in FIGURE 7-14:

1. *Click or tap the **Notification** button.*
2. *Click or tap the **Send Notification** button.*



FIGURE 7-14: Notification Bar

FIGURE 7-15 shows the **Create Notification** dialog.

1. *Click or tap the **Start Wizard** button.*

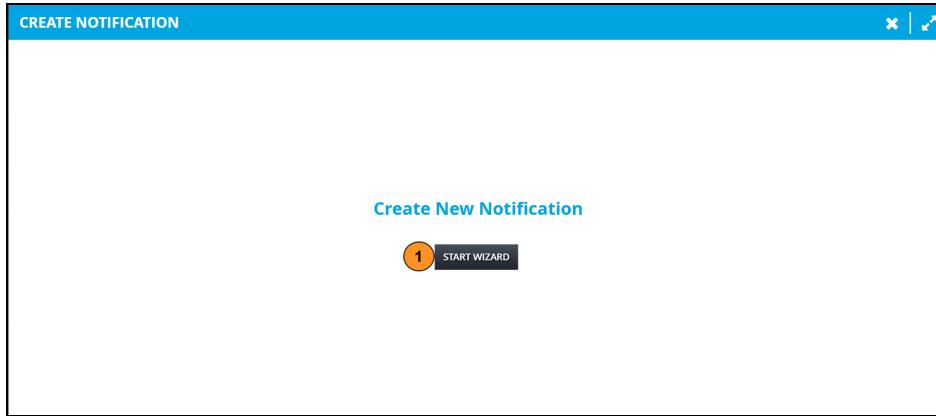


FIGURE 7-15: Create Notification

Enter the notification options, as shown in FIGURE 7-16:

1. Click or tap **Requires user input** to place a check.
2. Click or tap **Use Access Rules** to place a check.
3. Enter the **Due Date** if **Requires user input** is checked.
4. Select the **Notification Type**.
5. Enter the **Notification Subject**.
6. Enter the **Message**.
7. Click or tap the **Next** button.

CREATE NEW NOTIFICATION - STEP 1 OF 4

Notification Details

Requires user input 1

Use Access Rules 2

Due Date MM/DD/YYYY HH:mm:ss AM 3

Notification Type 4
Acknowledge

Notification Subject * 5

Message 6

CANCEL 7 NEXT

FIGURE 7-16: Access Rule Notification Step 1

Matrices that have an access rule created for them will be displayed, as shown in FIGURE 7-17:

1. Select the **matrix** to use.
2. Click or tap **Next**.

CREATE NEW NOTIFICATION - STEP 2 OF 4

Required input details

Select matrix

Search matrices

Counties Alerts

Hospitals Alerts 1

CANCEL BACK 2 NEXT

FIGURE 7-17: Access Rule Notification - Step 2

Select the measures that users will update, as shown in FIGURE 7-18:

1. Select desired measure(s).
2. Click or tap Next.

CREATE NEW NOTIFICATION - STEP 3 OF 4

Required input details

Selected Matrix:
Hospitals Alerts

Select measures:

Search measures

Region	<input checked="" type="checkbox"/> Available Priority 3	<input checked="" type="checkbox"/> Psych - Immed	<input type="checkbox"/> Physical Plant Systems - Computer...
County	<input checked="" type="checkbox"/> Adult ICU - Immed	<input checked="" type="checkbox"/> NICU Immediate	<input type="checkbox"/> Physical Plant Systems - Heating a...
Hospital	<input type="checkbox"/> Burn - Immed	<input type="checkbox"/> OB Immed	<input type="checkbox"/> Physical Plant Systems - Potable W...
Emergency Department Phone Nu...	<input type="checkbox"/> Med/Surg Immed	<input type="checkbox"/> Hospital Incident Command Cente...	<input type="checkbox"/> Physical Plant Systems - Sewer
Hospital Incident Command Post P...	<input type="checkbox"/> Peds - Immed	<input type="checkbox"/> Mass Decon	<input type="checkbox"/> Physical Plant Systems - Telephone

CANCEL **BACK** **2 NEXT**

FIGURE 7-18: Access Rule Notification - Step 3

To select any combination of user groups, as shown in FIGURE 7-19:

1. Click or tap desired recipient groups.
2. Click or tap the **Send** button when ready to send the notification.

CREATE NEW NOTIFICATION - STEP 4 OF 4

Required input details

Selected recipients:

Workspaces Groups Users

Search groups

<input type="checkbox"/> Washington Medical Cen...	<input checked="" type="checkbox"/> Memorial Hospital Notify...
--	---

CANCEL **BACK** **2 SEND**

FIGURE 7-19: Access Rule Notification - Step 4.

7 - 1.4 Other Notification Action(s)

Other actions may be performed with notifications including sending a notification and canceling a notification.

To perform any of the above actions on one or more notifications, as shown in FIGURE 7-20:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

NOTIFICATIONS						
	Subject	Messages	Acknowledged...	Sent By	Message	Last Modified
<input type="radio"/>	Update Bed Status	4	4	Training User	Please update bed status immediately.	3/16/15 3:40 PM
<input checked="" type="radio"/> 1	Update Bed Status	1	1	Training User	Please update bed status.	4/27/15 10:25 AM

FIGURE 7-20: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 7-21.

1. **Resend Notification** will resend the notification to those users on the original distribution who have not yet acknowledged it.
2. **Cancel Notification** will send the notification to everyone on the original distribution with "Canceled" added to the subject header.

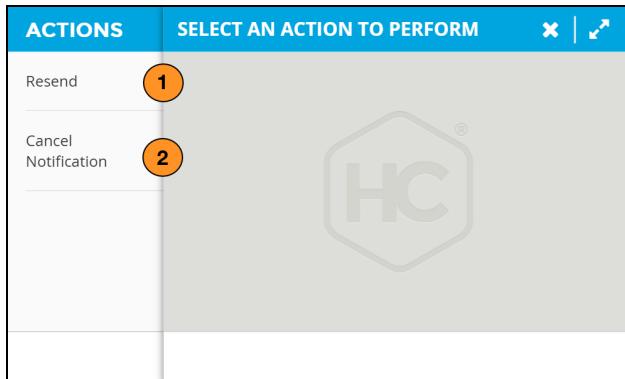


FIGURE 7-21: Notifications - Other Actions

7 - 1.5 Filtering Notifications

The main Notifications page may contain many notification listings. Pre-determined filter tools are available to sort and filter the list.

To filter notifications, as shown in FIGURE 7-22:

1. Click or tap the **Filter** button.
2. Select the desired **Filter** from the drop-down menu.

To remove the filter:

3. Click or tap the **Filter** item listed in the drop-down menu called **Filter**.

The screenshot shows a table of notifications with columns: Subject, Messages, Acknowledged..., and Sent By. At the top right, there is a 'Display' dropdown, a 'Filter' button (circled 1), a search bar, and a 'Send' button. A dropdown menu for 'Filter' is open, showing options like Today, Last 2 Days, Last 5 Days, Last 10 Days, Month to Date, and Year to Date. The 'Today' option is highlighted (circled 2). The 'Filter' button in the main header is also circled 3.

NOTIFICATIONS				
	Subject	Messages	Acknowledged...	Sent By
<input type="radio"/>	Update Bed Status	1	1	Training User
<input type="radio"/>	CSV Upload Complete	1	1	Training User
<input type="radio"/>	Update bed availability immediately	1	1	Training User
<input type="radio"/>	Update Bed Status	0	0	Training User

FIGURE 7-22: Filter Options

7 - 2: Notification Templates

Notification Templates help to organize and manage Notifications. Use the **Templates** tool to create a notification that will be sent at a later time or be re-used over time.

To manage notification templates, as shown in FIGURE 7-23:

1. Click or tap on the **Notifications & Templates** icon.
2. Click or tap on the **Templates** icon under the **Manage My Notifications** section.

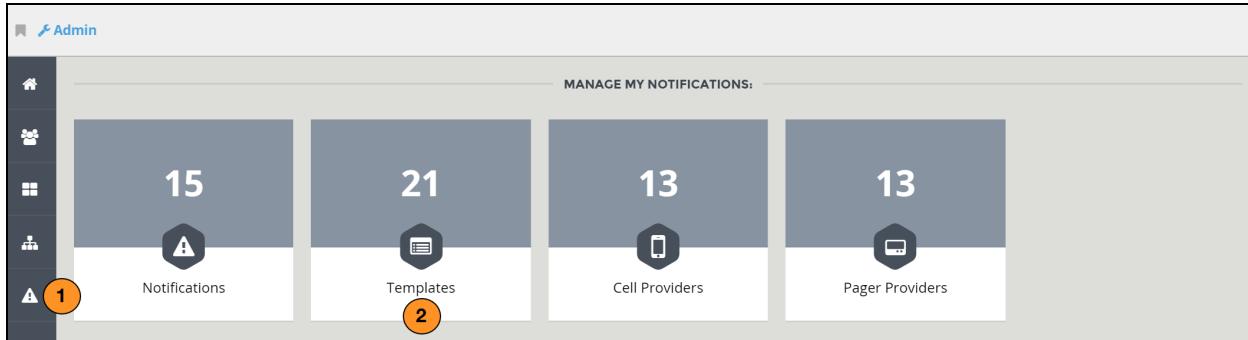


FIGURE 7-23: Notification Templates

FIGURE 7-24 shows the main notification templates page. This page lists all notification templates previously created. This also allows for the sending of a notification template.

NOTIFICATIONS						
	Subject	Messages	Acknowledged	Sent By	Message	Last Modified
<input type="radio"/>	Update Bed Status	4	1	Training User	Please update bed status immediately.	3/16/15 7:40 PM
<input type="radio"/>	Cancelled - test	1	1	Training User	asdf	3/16/15 7:40 PM
<input type="radio"/>	test	1	1	Training User	asdf	3/12/15 7:22 PM

TOTAL ITEMS: 3 SELECTED ITEMS: 0

FIGURE 7-24: Notification Template List

7 - 2.1 Creating a Notification Template

To create a notification template, as shown in FIGURE 7-25:

1. Click or tap the **Create New Template** button.

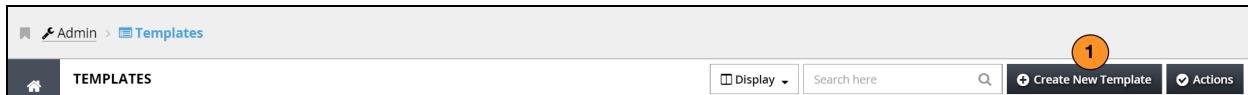


FIGURE 7-25: Create New Template Button

The **Add Template** tool will display with the **Details** tab already selected, as shown in FIGURE 7-26.

1. Enter a **Subject**.
2. Enter a **Message**.
3. Set a due date. This is optional and will automatically expire and remove the notification after the due date has passed.
4. Enable or disable **Track Acknowledgment** to track users that received the notification. This forces a notification received message window to continuously pop-up on a user's screen until the user *clicks or taps* the acknowledge button.

 A screenshot of the 'Add Template | Details' page. On the left is a sidebar with icons for Home, Admin, Templates, and Add Template. The main area has tabs: 'Details' (which is blue and highlighted), 'Input Details', 'Groups', 'Workspaces', and 'Users'. In the 'Details' tab, there are two sections: 'General' and 'Options'.

- General:** Contains fields for 'Subject' (with a red asterisk) and 'Category'. The 'Subject' field has an orange circle with '1' over it. The 'Category' dropdown is set to 'Acknowledge' and has an orange circle with '2' over it.
- Options:** Contains 'Due Date' (a date/time input field with an orange circle and '3' over it) and 'Track Acknowledgement' (a checked checkbox with an orange circle and '4' over it).

 There are also sections for 'Short Message' and 'Message' with their respective text areas.

FIGURE 7-26: Notification Template

If this notification will be used to request matrix data input, as shown in FIGURE 7-27:

1. Click or tap **Input Details** tab.
2. Click or tap **Requires user input** check.
3. Select a **Matrix**.
4. Select the **Measures** to be included.

FIGURE 7-27: Notification Template - Input Details

Notifications can be sent to any combination of user groups, workspaces, and users.

- **Groups** will distribute to all members in a specific user group.
- **Workspaces** will send the notification to all users who have access to a particular workspace.
- **Users** will send the notification to specific user(s).

In the example shown in FIGURE 7-28, a user group has been designated as the recipient of the notification.

1. Click or tap the **Groups** tab.
2. Click or tap the **Add Group** button. Select an item from the available list. For more information, see "Selecting Items from an Available List" on page 1. Repeat this step for each recipient type for the notification.

FIGURE 7-28: Notification Template - Groups

To send or cancel the notification, as shown in FIGURE 7-29:

1. Click or tap the **Save** button when ready to send the notification. The notification will send immediately.
OR
2. Click or tap **Back** to discard the notification.

FIGURE 7-29: Save and Back buttons

To exit the notification templates tool, as shown in FIGURE 7-30:

1. Click or tap the **Save** button to keep any changes.
OR
2. Click or tap the **Back** button to abandon any changes and close the tool.

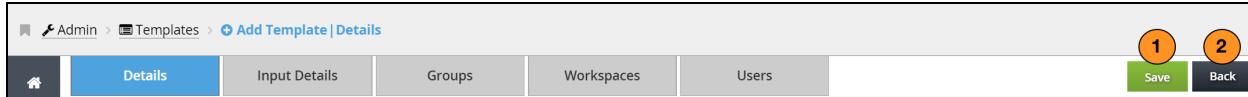


FIGURE 7-30: Save and Back buttons

7 - 2.2 Sending a Notification from a Template

To send a notification that is based on a template, as shown in FIGURE 7-31:

1. Click or tap the **circle** to the left of the desired subject template.
2. Click or tap the **Actions** button.

TEMPLATES				
	Subject	Message	Short Message	Last Modified
<input type="radio"/>	Subject			
<input type="radio"/>	Update Bed Status	Please update bed status immediately.	Please update bed status immediately.	3/16/15 3:40 PM
<input checked="" type="radio"/> 1	Update Bed Status	Please update bed status.	Please update bed status.	4/27/15 10:25 AM

FIGURE 7-31: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 7-32.

1. Click or tap the **Send** button and confirm the action.

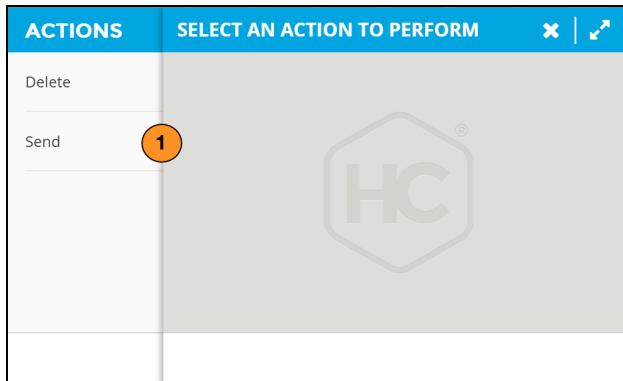


FIGURE 7-32: Notification Templates - Actions

7 - 3: Cell and Pager Providers

The Cell and Providers tools allow an Admin to build the list from which users will select the carrier that provides service for the users' cell phone or alphanumeric pager. The process for creating and managing providers is the same for both. The section below details working with Cell providers; the process for managing Pager providers is exactly the same.

To manage cell providers, as shown in FIGURE 7-33:

1. Click or tap on the **Notifications & Templates** icon.
2. Click or tap on the **Cell Providers** icon under the **Manage My Notifications** section.

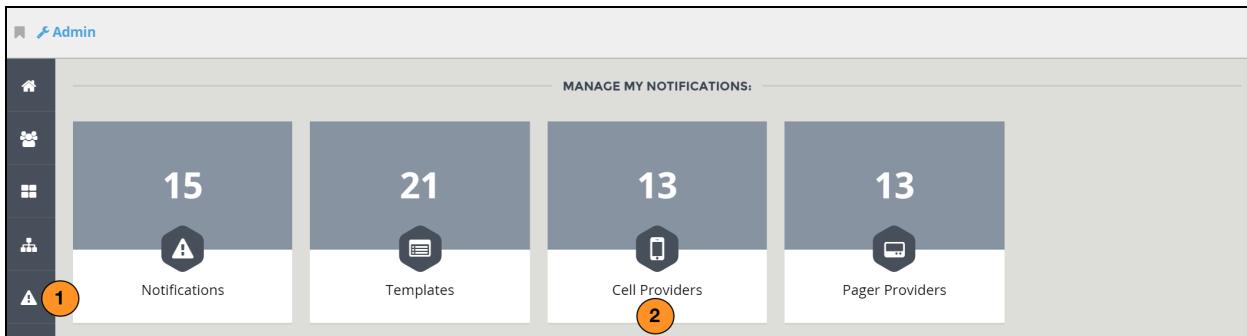


FIGURE 7-33: Cell Providers

FIGURE 7-34 shows Providers already in the system and are listed by carrier name, along with the e-mail format that will be used to send text messages to users who select that carrier.

CELL PROVIDERS			
	Name	Email Format	Last Modified
<input type="radio"/>	Alltel	{0}@message.alltel.com	9/23/14 4:16 PM
<input type="radio"/>	AT&T	{0}@txt.att.net	9/23/14 4:16 PM
<input type="radio"/>	Boost Mobile	{0}@myboostmobile.com	9/23/14 4:16 PM
<input type="radio"/>	Cingular	{0}@cingularme.com	9/23/14 4:16 PM
<input type="radio"/>	Metro PCS	{0}@MyMetroPCS.com	9/23/14 4:16 PM

FIGURE 7-34: Cell Providers List

7 - 3.1 Creating a New Cell Provider

To create a new cell provider, as shown in FIGURE 7-35:

1. Click or tap the **Create New Cell Provider** button.

FIGURE 7-35: Create New Cell Provider Button

The **Create New Cell Provider** tool will display, as shown in FIGURE 7-36.

1. Enter a Name.
2. Enter an Email Format.

The screenshot shows a web-based administrative interface for adding a new cell provider. The title bar indicates the path: Admin > Cell Providers > Add Cell Provider. The main form is titled 'ADD NEW PROVIDER' and contains two fields: 'Name' and 'Email Format'. Both fields have red asterisks indicating they are required. The 'Name' field has a character limit of 100 characters, and the 'Email Format' field has a limit of 30 characters. A red circle with the number '1' is overlaid on the 'Name' input field, and another red circle with the number '2' is overlaid on the 'Email Format' input field. The interface includes a sidebar with icons for Home, General, Advanced, and Rules. At the top right are 'Save' and 'Back' buttons.

FIGURE 7-36: Create New Cell Provider Dialog

Note: Knowing which **Email Format** to use:

These formats are volatile due to changes in cell providers (mergers, etc.), so it is not practical to maintain a list in this document. Many web sites list the available SMS email formats. These lists can be found online by using a web search (e.g. Google) with a query similar to the following:

"SMS email provider list"

The search will return a list of links, some of which will contain lists of email formats.



The format may be shown in various ways. The examples below show some possible representations for the "Alltel" cell provider. Notice that all of these formats end with "@message.Alltel.com".

mobile#@message.Alltel.com
n@message.Alltel.com
10DigitNumber@message.Alltel.com

When adding the **Email Format** to HC Standard®, replace any text appearing before the "@" with "{0}". The resulting format should look like the following example:

{0}@message.Alltel.com

To exit the cell providers' tool, as shown in FIGURE 7-37:

1. Click or tap the **Save** button to keep any changes.
- OR
2. Click or tap the **Back** button to abandon any changes and close the tool.

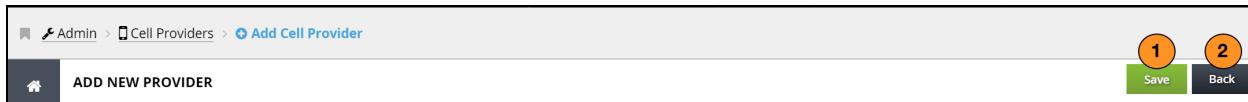


FIGURE 7-37: Save and Back buttons

7 - 3.2 Other Cell Provider Action(s)

One other action, delete, may be performed with cell providers.

To perform this action on one or more cell providers, as shown in FIGURE 7-38:

1. Click or tap the **circle** of the desired item.
2. Click or tap the **Actions** button.

CELL PROVIDERS			<input type="button" value="Display"/>	Search here	<input type="button" value="Create New Cell Provider"/>	<input checked="" type="button" value="Actions"/>
<input type="radio"/>	Name		<input type="button" value="Display"/>	<input type="button" value="Search"/>		Last Modified
<input checked="" type="radio"/>	1	tel	{0}@message.attel.com			9/23/14 12:16 PM

FIGURE 7-38: Actions Button

Select the desired action and follow the prompt, as shown in FIGURE 7-39.

1. **Delete** remove the provider from the system.

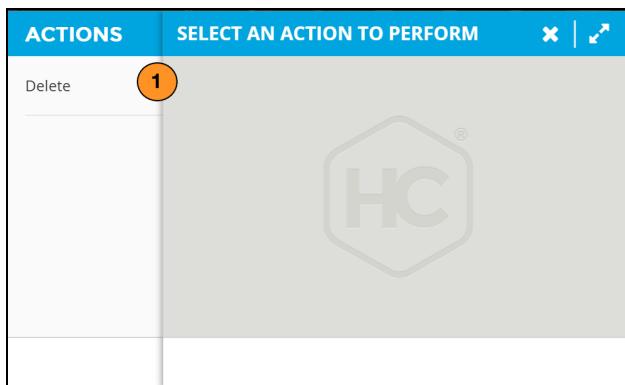


FIGURE 7-39: Cell Providers- Other Actions

Chapter 8 - System

Logs and system-wide configuration options are managed in the **Manage My System** section. These tools are mainly used by GER technical support.

The following options should only be managed by GER technical support, as shown in FIGURE 8-1:

1. Configuration Settings
2. Modules

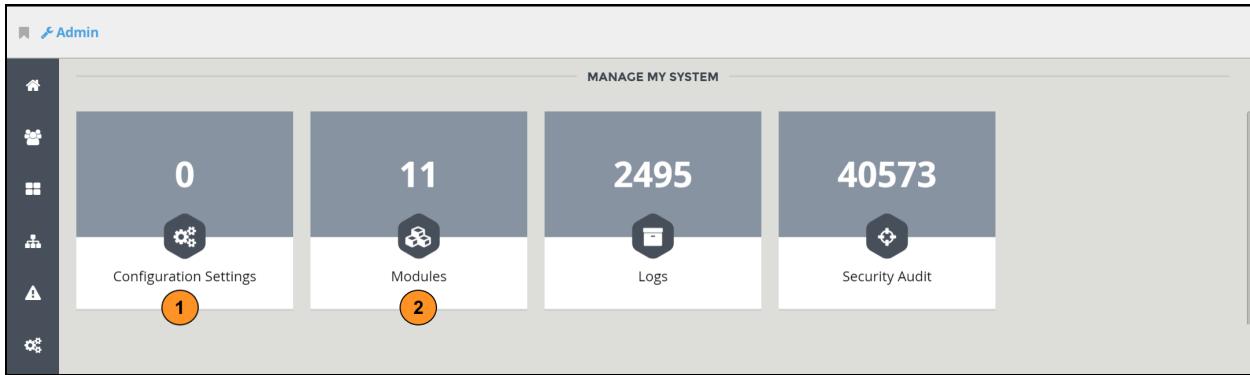


FIGURE 8-1: Manage My System

8 - 1: Logs

The **Logs** tool gives a complete listing of the log table pulled directly from the sequel server database for the application. Generally, this tool is used by a GER Technician when troubleshooting the system.

To view logs, as shown in FIGURE 8-2:

1. Click or tap on the **System** icon.
2. Click or tap on the **Logs** icon under the **Manage My System** section.

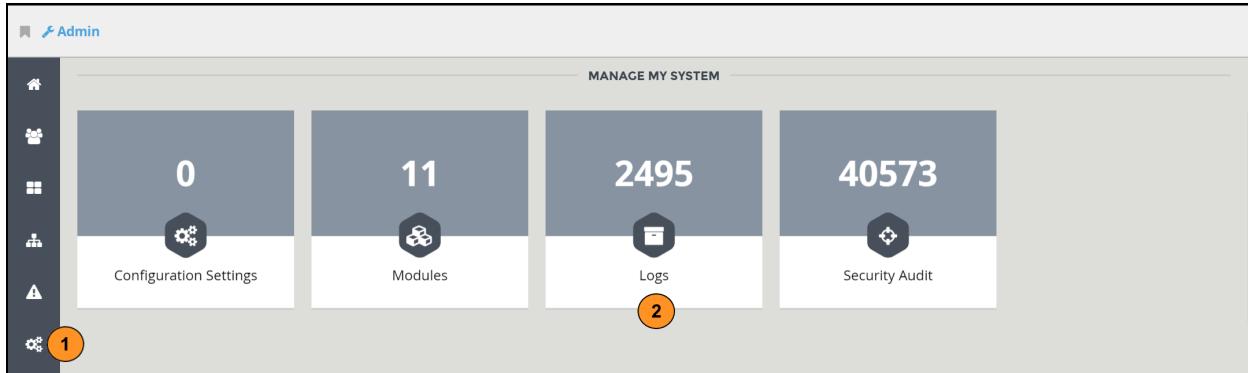


FIGURE 8-2: Logs

FIGURE 8-3 shows the main Logs page. This page lists all logs collected by the system. Admins do not manage anything on this page.

	LOGS											
	ID	Client Log...	Application	Applicatio...	User Name	Context Info	Custom Le...	Message	Stack Trace	Note	Class	
	11690	5/7/15 2:28 PM	NotificationSe...	a50876a4-63d...	DFUser		Exception	SqlDateTime o...	at System.Dat...		Ch	
	11689	5/7/15 2:28 PM	NotificationSe...	a50876a4-63d...	DFUser		Exception	SqlDateTime o...	at System.Dat...		Ch	
	11688	5/7/15 2:28 PM	NotificationSe...	a50876a4-63d...	DFUser		Exception	SqlDateTime o...	at System.Dat...		Ch	
	11687	5/7/15 2:28 PM	NotificationSe...	a50876a4-63d...	DFUser		Exception	SqlDateTime o...	at System.Dat...		Ch	

TOTAL ITEMS: 10839

FIGURE 8-3: Logs List

8 - 1.1 Download Logs CSV

Admins may download a CSV log of all entries in the system.

To download a CSV, as shown in FIGURE 8-4:

1. Click or tap the **Download CSV** button and the CSV file will download.

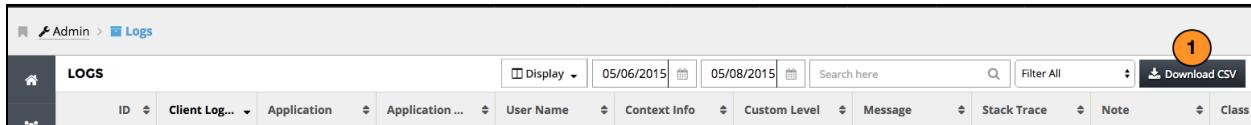


FIGURE 8-4: Download CSV button

8 - 2: Security Audit

The security audit section allows an Admin to view a detailed report of security related changes made by all users of the system. To view this report, an administrator must be assigned to the security audit group.

To view the security audit, as shown in FIGURE 8-5:

1. Click or tap on the **System** icon.
2. Click or tap on the **Security Audit** icon under the **Manage My System** section.

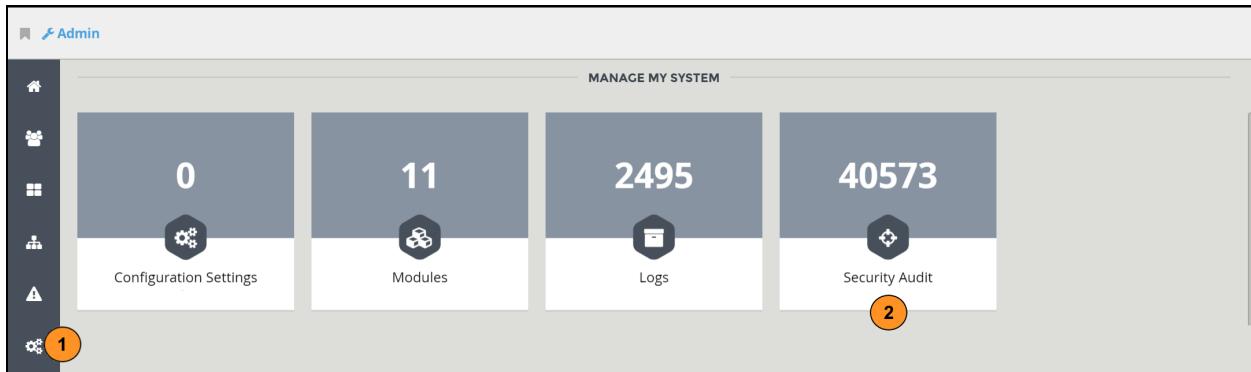


FIGURE 8-5: Security Audit

FIGURE 8-6 shows the main security audit page. This page lists all entries collected by the system. This view can be filtered to a certain date range or type of event.

To filter the information by date range:

1. Click or tap to set a **beginning date**.
2. Click or tap to set an **end date**.

To filter to by event type:

3. Click or tap the **Filter All** drop-down menu.
4. Click or tap the event type.

SECURITY AUDIT

Description	Security Audit Event Name	Performed By UserName	CreatedOn	ModifiedOn
User [Training User] logged out of Session [7...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [ab...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [79...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged out of Session [e...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged out of Session [4...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [e9...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [77...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [40...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged out of Session [5c...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged out of Session [fb...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [fb...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged out of Session [d...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [d1...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged out of Session [0c...	Log Off	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM
User [Training User] logged on to Session [0c...	Log On	Training User	5/7/15 5:04 PM	5/7/15 5:04 PM

TOTAL ITEMS: 76

FIGURE 8-6: Security Audit List

8 - 2.1 Download Security Audit CSV

Admins may download a CSV log of all entries in the system.

To download a CSV, as shown in FIGURE 8-7:

1. Click or tap the **Download CSV** button and the CSV file will download.

SECURITY AUDIT

Description	Security Audit Event Name	Performed By UserName	CreatedOn	ModifiedOn
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FIGURE 8-7: Download CSV button

Chapter 9 - Glossary

Word or Phrase	Description
Administrator	A user with all privileges in HC Standard®. They have the ability to configure data, manage users, create and delete items, etc.
Admin mode	This is where the system configuration and setup occurs. User accounts designated with administrator permissions will have access to HC Standard® Admin mode.
Announcements	Notices that are posted on a bulletin board within a Workspace.
Application	Any system within the HC Standard® Suite (e.g. HC Patient Tracking, Mass Arrest, Incident Commander, CHATS Module, EPCR Module, etc.).
Application Launcher	Use to quickly switch to another application in the HC Standard® Suite.
Bookmarks	Allows quick access to previously saved items in HC Standard®.
Breadcrumb Navigation Bar	At any point within HC Standard®, this can be used to return to a previously visited section of the application. This is also known as the system path and is located below the tab navigation menu.
Charts	Provide a graphical displays of live matrix data.
Dashboard	A graphical interface that displays live relevant data to a user.
Download CSV	Allows a user to download matrix data into a .csv excel file.
eMEDS Interface	Image Trend ePCR.
Entity	An entity is a noun - person, place, or thing that needs to be tracked (e.g. patients). Each entity has certain attributes and can be grouped together with other entities.
Entity Group	A group of similar entities and associated measures.
EPTS	Electronic Patient Tracking System.
EWRAP	Emergency Wireless Routing Access Point. An EWRAP is a portable router that provides a secure data connection for users to connect any wireless device to a network or WAN.
Files	Any type of document or media file can be stored in a Workspace for viewing by appropriate users. A user must have the proper software installed on the user's local computer for viewing certain file formats.
Filters	Used to restrict or control the data displayed in a matrix.
Forms	Allows a user to enter matrix data by using a fillable PDF form.
Global Permissions	System-wide permissions, such as the ability to run the mobile patient tracking application or use Incident Commander, are controlled through Global Permissions. Other uses for global permissions include delegating Admin functions, such as creating workspaces and users to Sub-Admins.
ICS Settings / Information	Incident Command System settings. Incident, Division, and Position are referred to as the ICS Settings.
Incident Commander	Provides a high level summary of incident information in near real-time. Data is displayed in an easy-to-view customizable dashboard.

Links	Provide quick access to web resources such as traffic reports, weather conditions, live video feeds, event specific websites, or any other web link pertinent to the Workspace.
Lists	Used to populate drop down pick lists that contain a set of items. For example, a list of the fifty states could be created, then used by measures called "Home Address State", "Work Address State" and "Birth State". Lists can be used to store commonly used information (e.g. "Triage Status", "Divisions" or "Room Status").
Map Layers	Users may toggle additional map layers that may be of interest. Layers may include weather radar, geological fault lines, or even time zone references.
Maps	Displays matrix data that includes GPS coordinates on a visual map representation.
Matrix	A table of data. This is where a user spends the majority of time and where visualization of data takes place. Matrices supply the information used in reports, maps and charts.
Matrices	Plural term for Matrix.
MCI	Mass Casualty Incident. Any incident in which emergency medical services resources, such as personnel and equipment, are overwhelmed by the number and severity of casualties.
Measures	Data elements that, when taken together, provide a clear picture of the status of a given entity.
Measure Group	Allows users to gather any number of measures together under a common label (e.g. body parts, vital information, demographic information, etc.).
Measure Type	Can be a check box, date/time, numeric value, list, free text, or a relation.
Notifications	View received alerts and send new alerts to other users.
Permission Set	A list of system functions created and assigned to a user group. This defines the functions a specific user group will be able to perform in HC Standard®.
Reports	Provide an organized view of matrix data that a user can view, print, or export.
Sort	Used to order the data displayed in a matrix in ascending or descending order.
Sub-Admin	A user who is delegated to perform some, but not all, Admin functions in the system.
Synchronization	This term describes the sending of data from a mobile device to the back-end HC Standard® database for viewing on the web interface.
User Groups	The section within HC Standard® Admin mode that allows permissions to be created for a specific group of users.
Workspace	Related Reports, Charts, Files, Announcements, Matrices, and Links are stored in one area called a Workspace. A user may have more than one Workspace.
Workspace Permissions	All data in HC Standard® is made available through workspaces. Matrices, charts and other items are placed in a workspace. User groups are assigned to the workspace and given access to those items with one of the permission sets available in the system.