HC Standard®

Administrator Manual

Version 4.4

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HC Standard® Administrator

To Contact GER
Global Emergency Resources, LLC
1030 Stevens Creek Road
Augusta, Georgia 30907-3204
Tel: 866.242.4035
support@ger911.com
ger911.com

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Table of Contents

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.

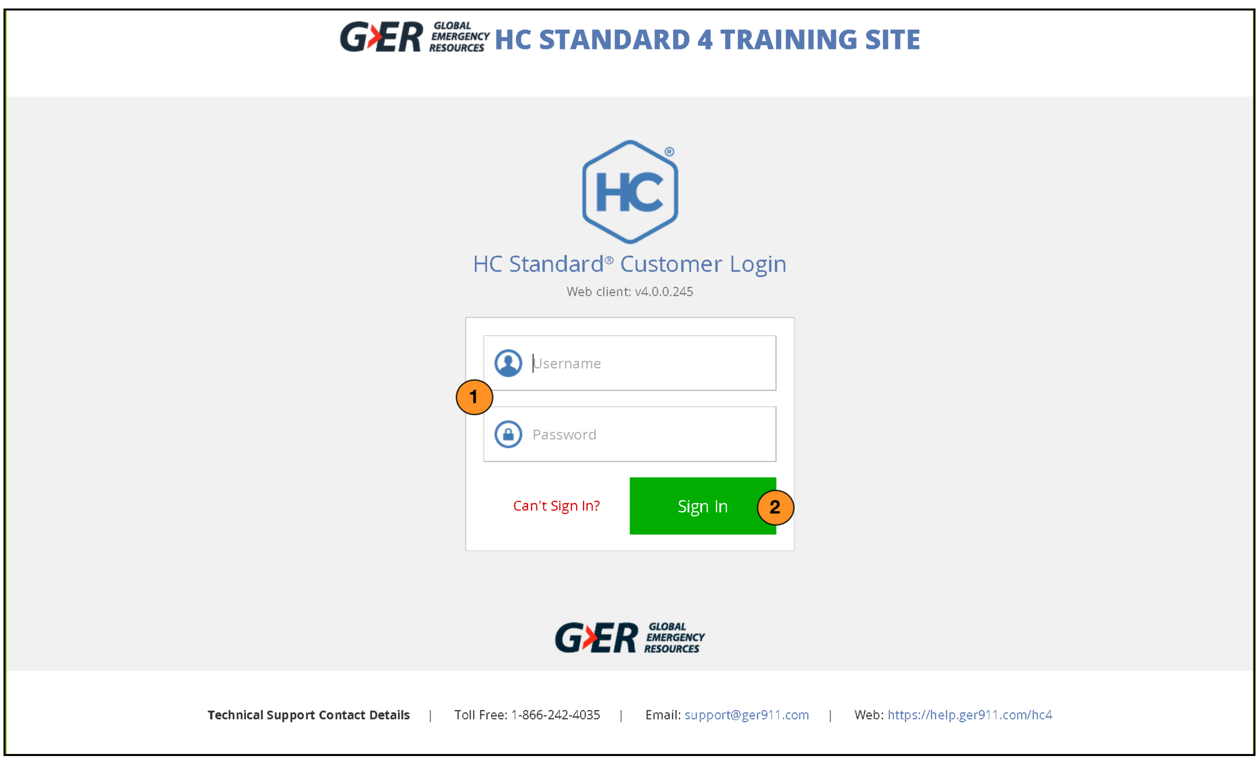


FIGURE 2-1: Login Prompt

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.

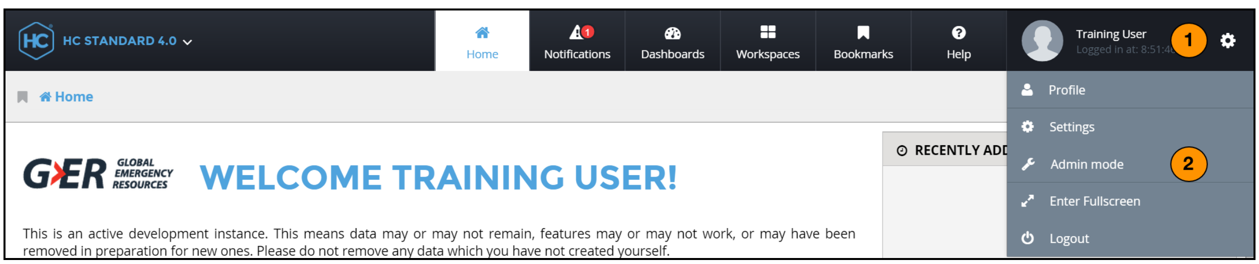


FIGURE 2-2: Admin mode in User Tab

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.

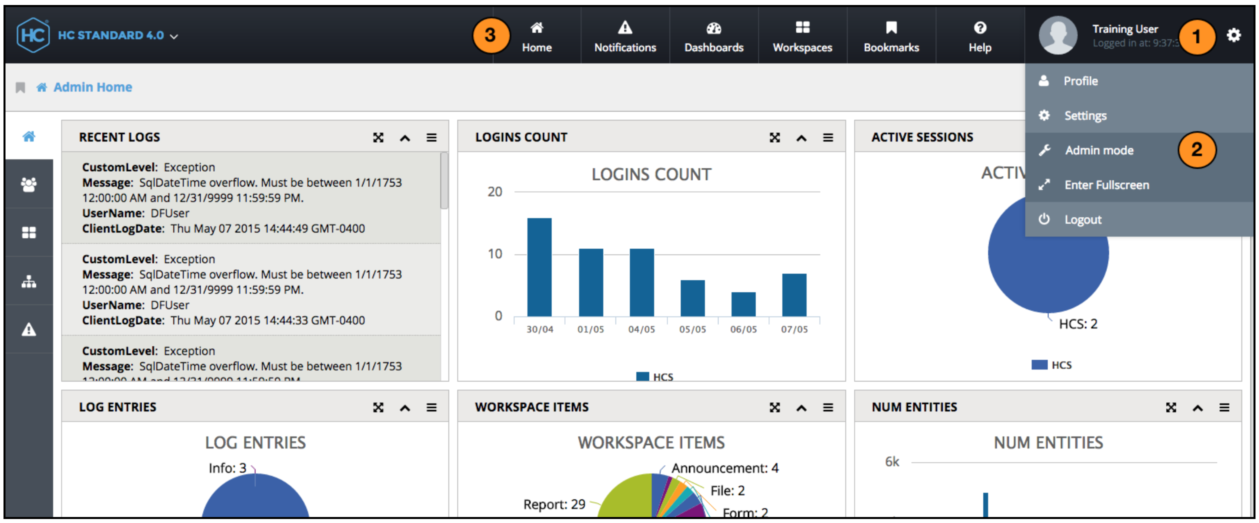


FIGURE 2-3: Leaving Admin mode

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.

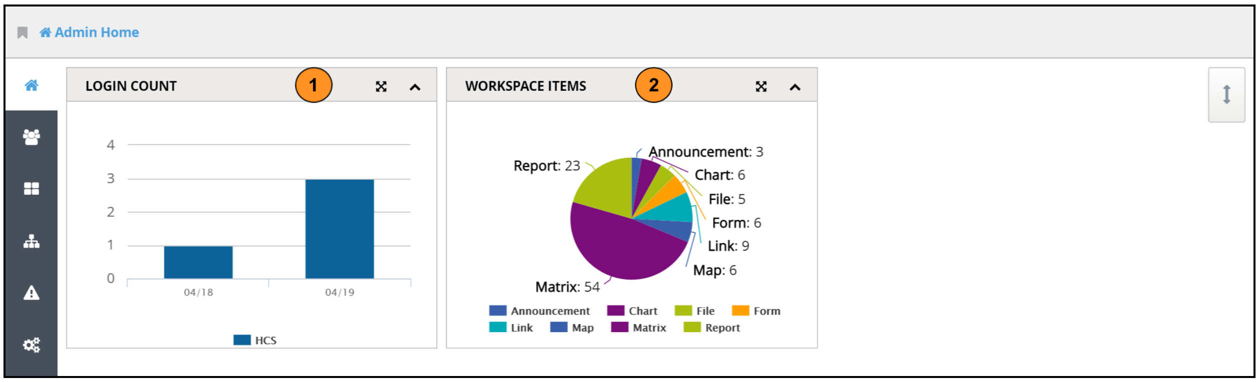


FIGURE 2-4: Admin mode Dashboard

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.

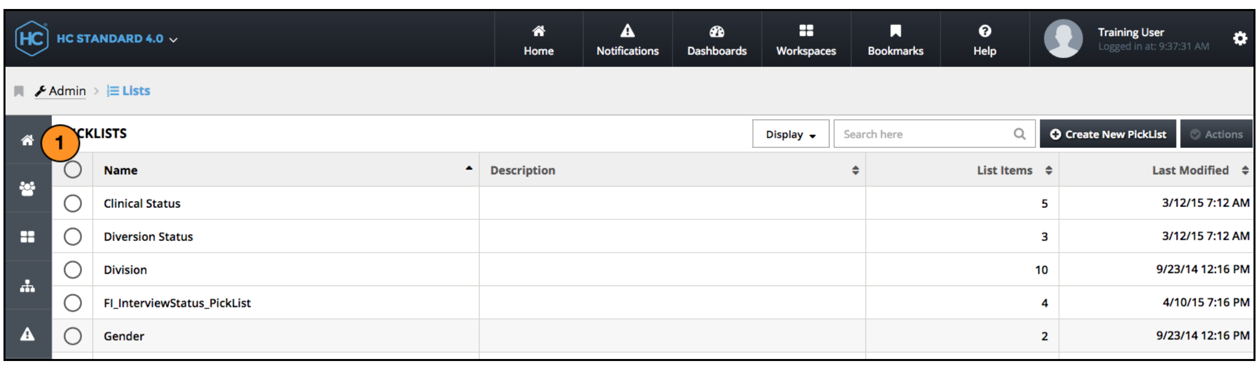


FIGURE 2-5: Admin Dashboard Home button

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.

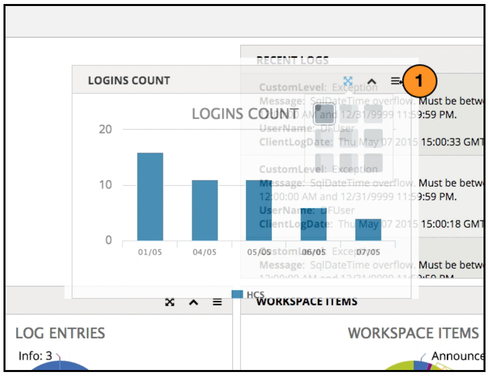


FIGURE 2-6: Move Dashboard item

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.

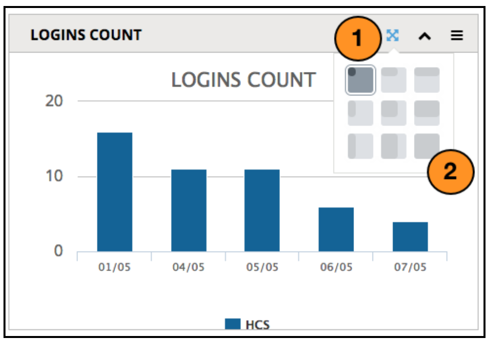


FIGURE 2-7: Adjust Dashboard Item Size

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.

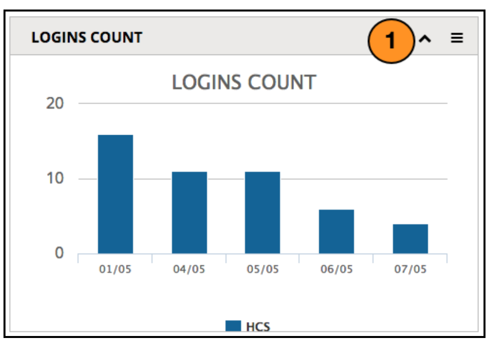


FIGURE 2-8: Collapse/Expand Dashboard Item

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 re-arranged.

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.

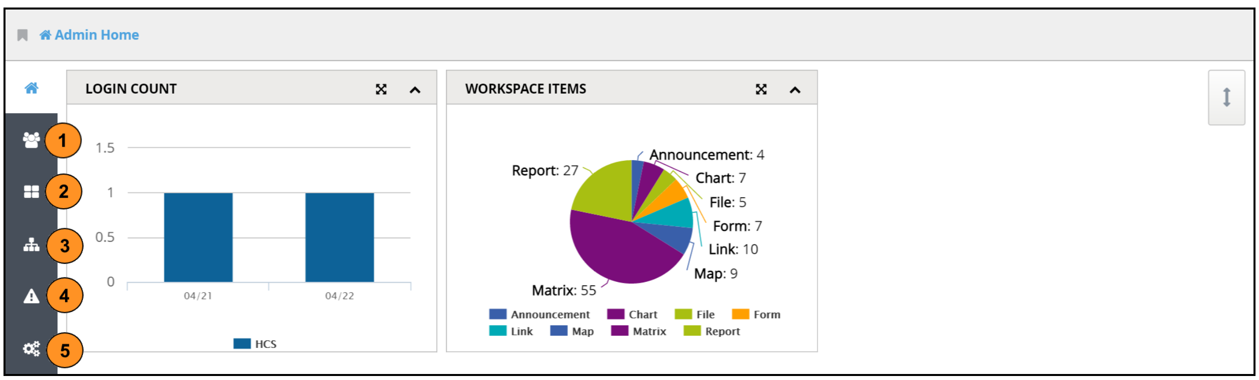


FIGURE 2-9: Admin Categories

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.

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

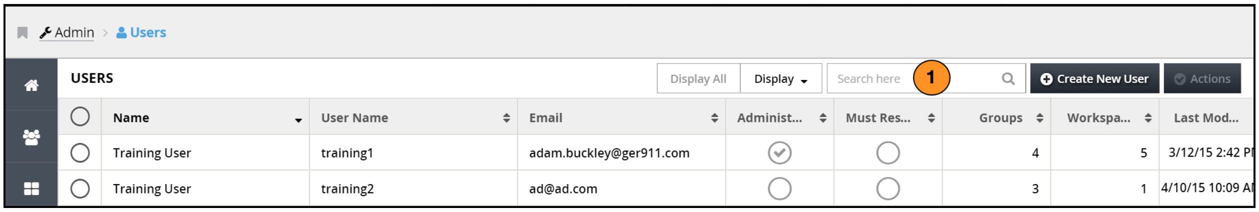


FIGURE 2-10: Search Bar

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.

1. *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.
2. A small **arrow** pointing up or down, at the right side of each column header, indicates the selected order.

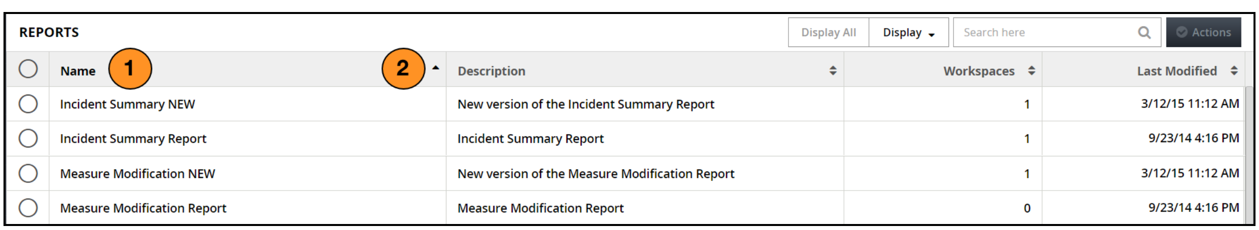


FIGURE 2-11: Example: Ascending Sort applied to Name

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**.

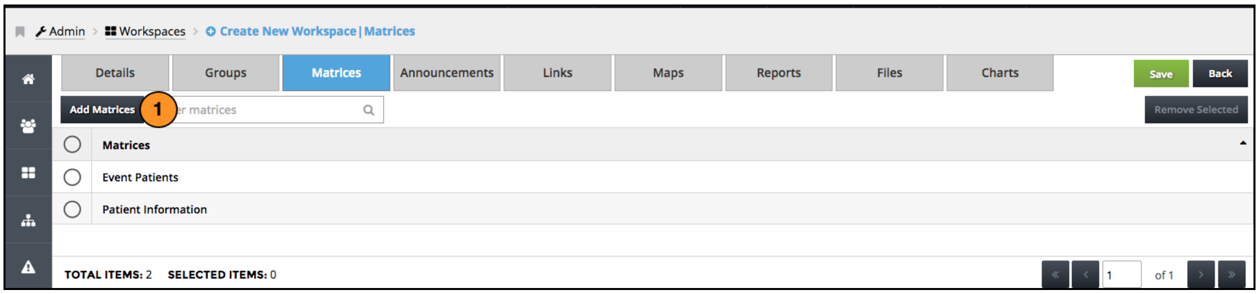


FIGURE 2-12: Add Matrices Button

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.

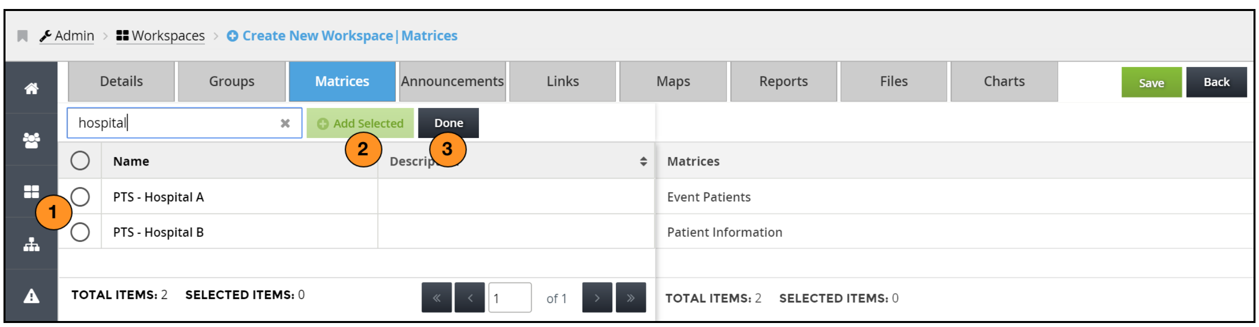


FIGURE 2-13: Add Items

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.

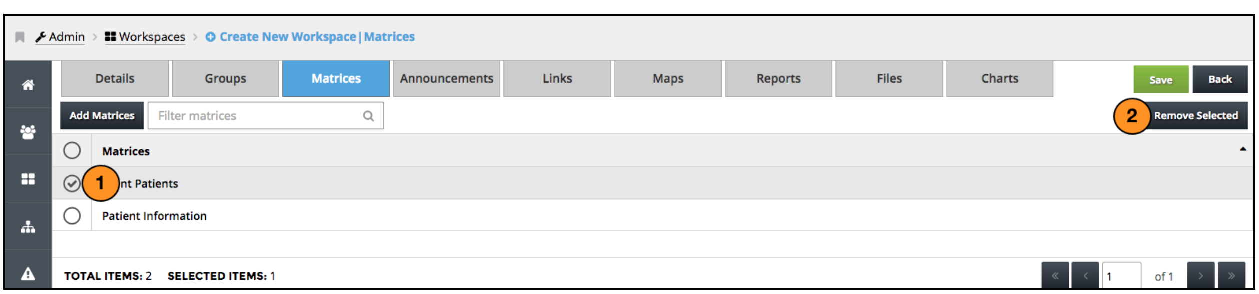


FIGURE 2-14: Remove Selected Items

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, allegies, and triage information.

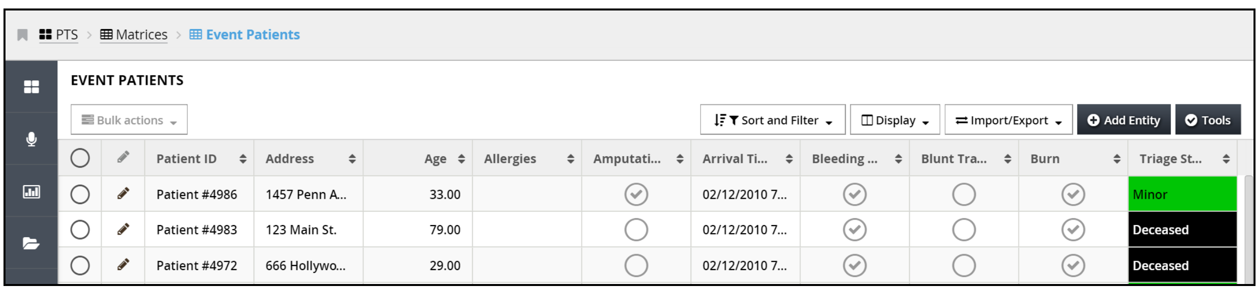


FIGURE 3-1: Fully realized matrix example

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.

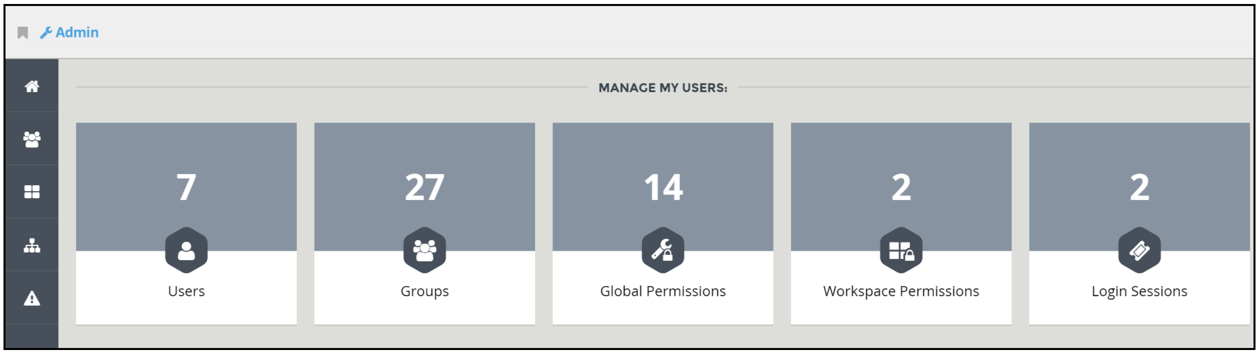


FIGURE 4-1: Users, User Groups, and Permissions

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.

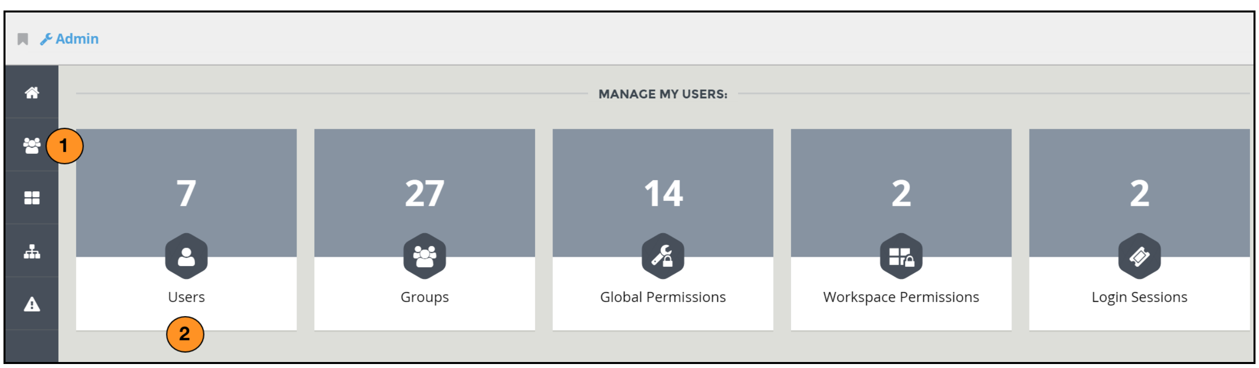


FIGURE 4-2: Users

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.

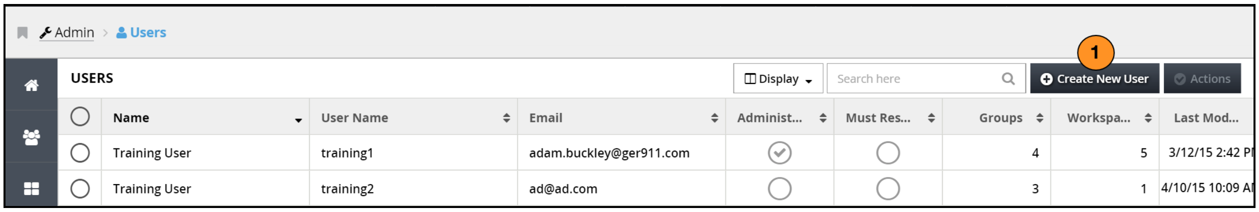


FIGURE 4-3: Create New User Button

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.

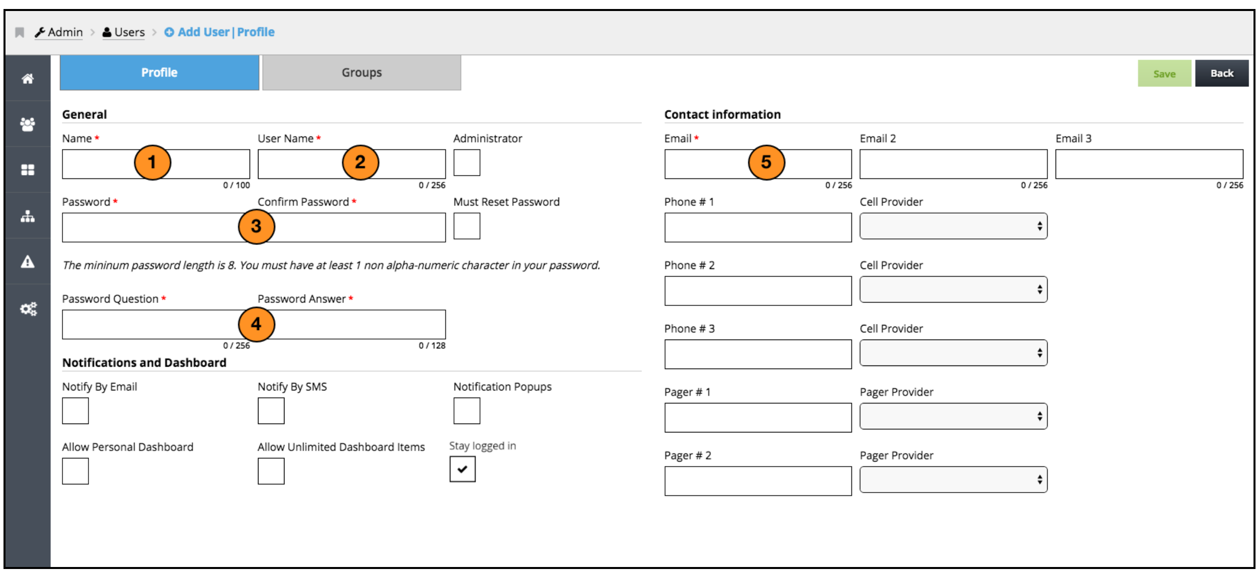


FIGURE 4-4: Add User - Profile

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. .

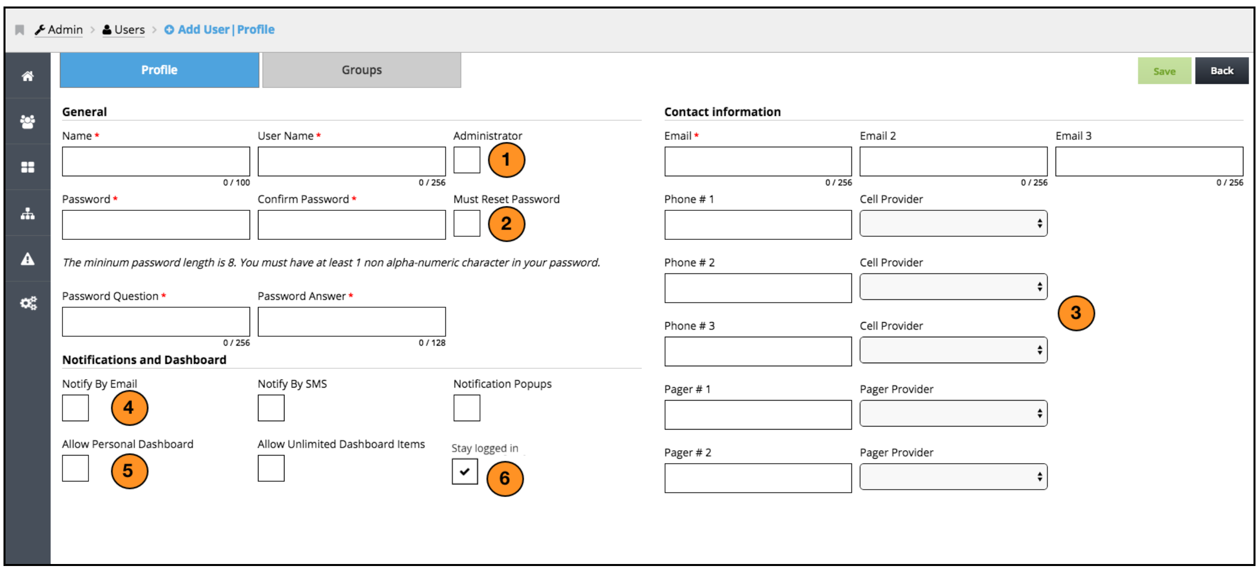


FIGURE 4-5: User Profile - Additional Fields

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.

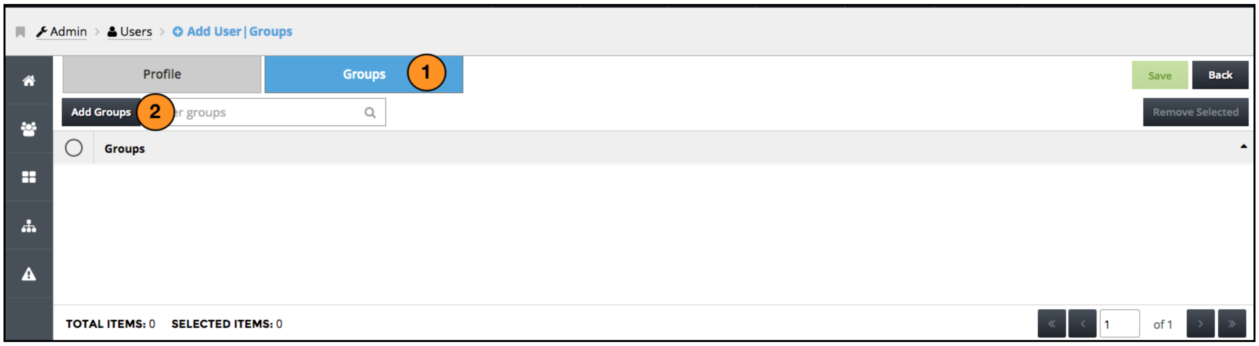


FIGURE 4-6: Add User - Groups

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.

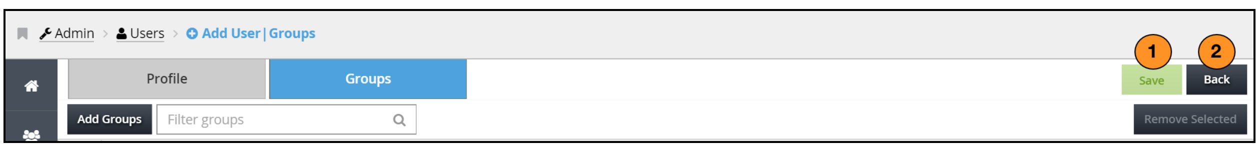


FIGURE 4-7: Save and Back Buttons

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.

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.

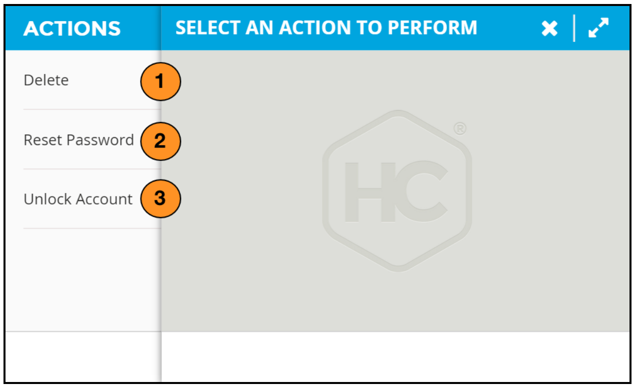


FIGURE 4-9: User Actions

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.

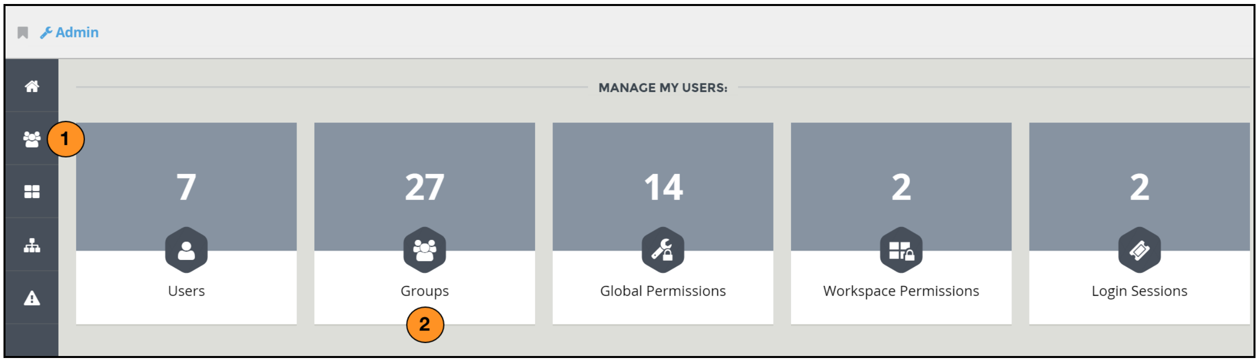
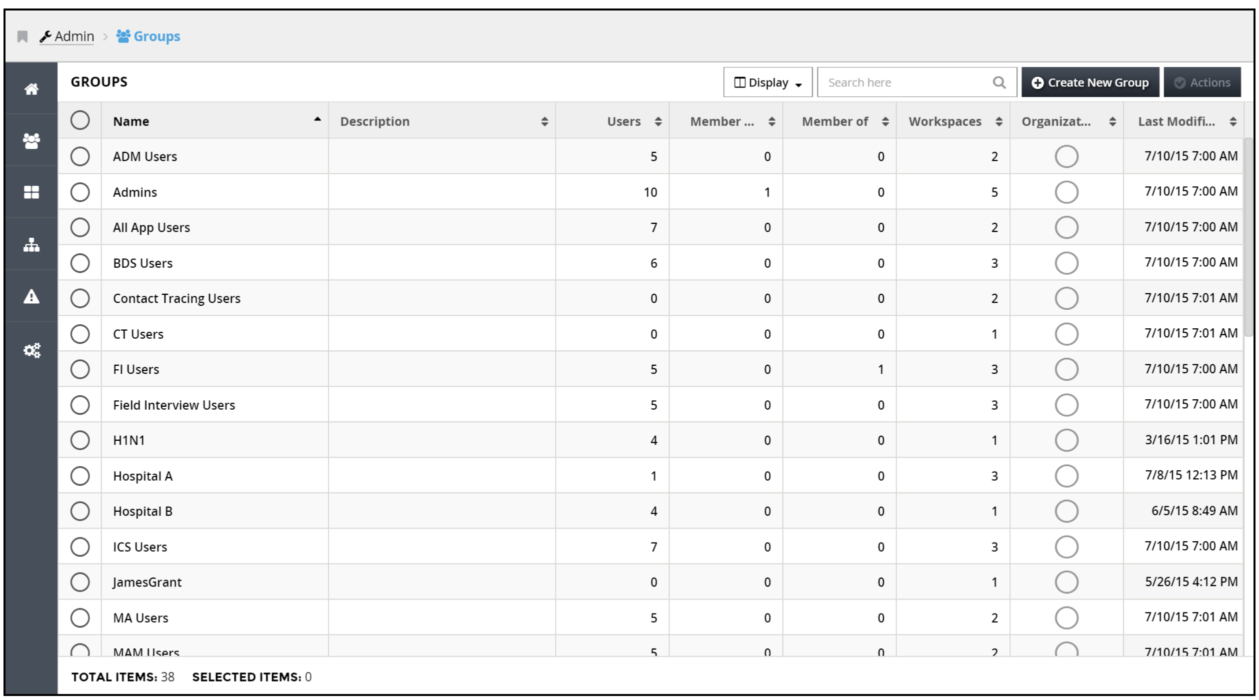


FIGURE 4-10: Groups

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 ...	Member of	Workspaces	Organizat...	Last Modifi...
ADM Users		5	0	0	2		7/10/15 7:00 AM
Admins		10	1	0	5		7/10/15 7:00 AM
All App Users		7	0	0	2		7/10/15 7:00 AM
BDS Users		6	0	0	3		7/10/15 7:00 AM
Contact Tracing Users		0	0	0	2		7/10/15 7:01 AM
CT Users		0	0	0	1		7/10/15 7:01 AM
FI Users		5	0	1	3		7/10/15 7:00 AM
Field Interview Users		5	0	0	3		7/10/15 7:00 AM
H1N1		4	0	0	1		3/16/15 1:01 PM
Hospital A		1	0	0	3		7/8/15 12:13 PM
Hospital B		4	0	0	1		6/5/15 8:49 AM
ICS Users		7	0	0	3		7/10/15 7:00 AM
JamesGrant		0	0	0	1		5/26/15 4:12 PM
MA Users		5	0	0	2		7/10/15 7:01 AM
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.

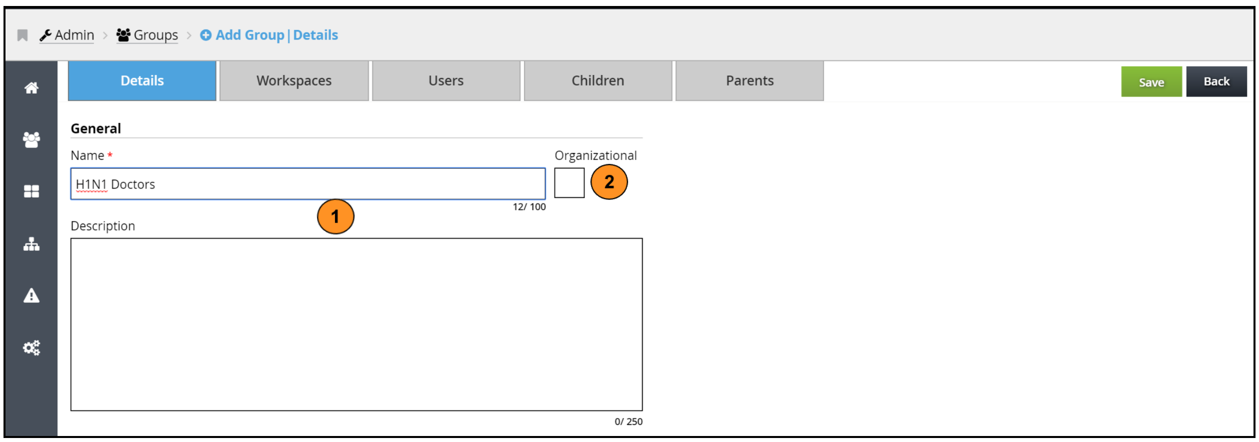


FIGURE 4-13: Add Group

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.

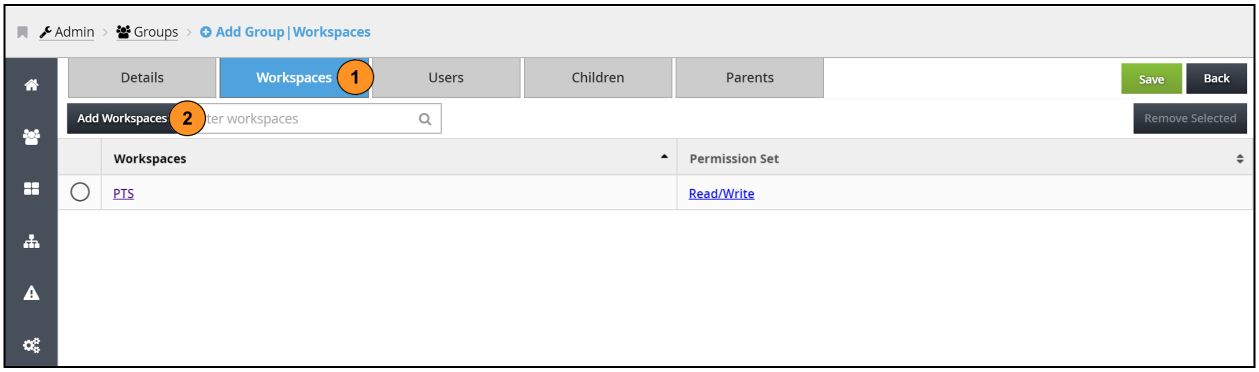


FIGURE 4-14: Add Workspaces Panel

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.

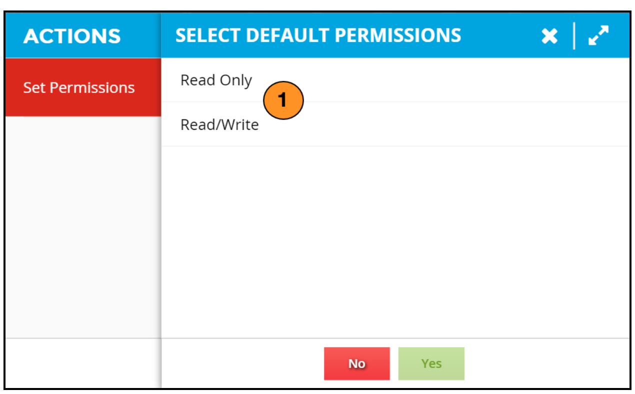


FIGURE 4-15: Set Permissions Action

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.

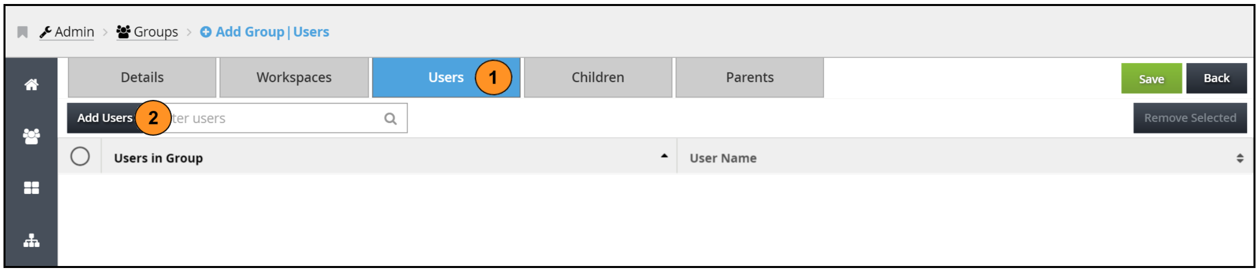


FIGURE 4-16: Add Users

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.

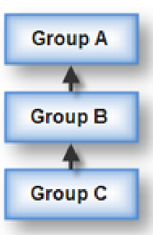


FIGURE 4-17: Group Diagram

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.

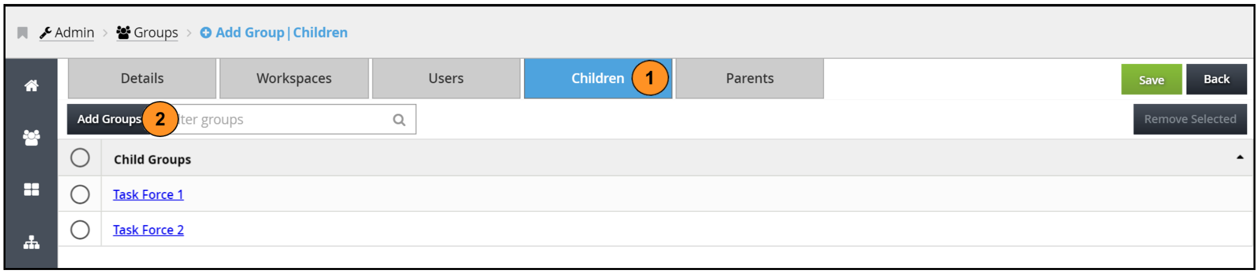


FIGURE 4-18: User Group Example

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.

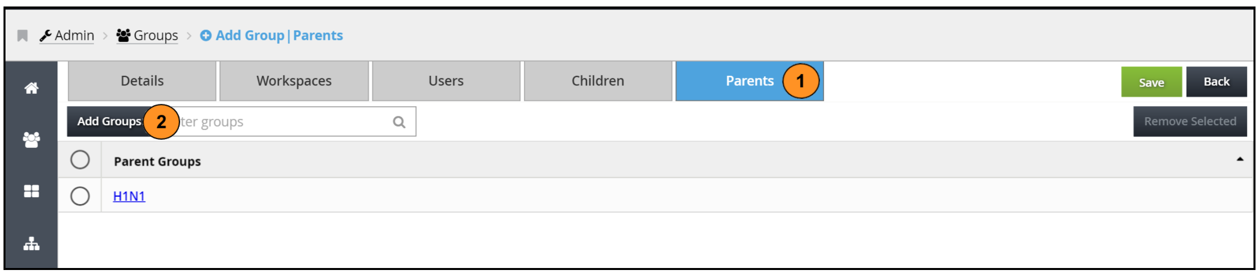


FIGURE 4-19: User Group Example

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

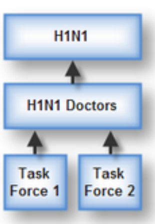


FIGURE 4-20: Example Group Diagram

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.

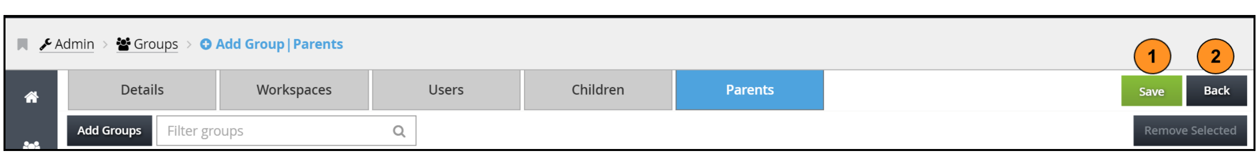


FIGURE 4-21: Save and Back Button

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.

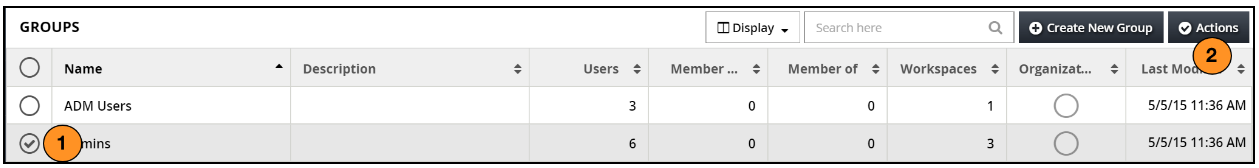


FIGURE 4-22: User Group Actions button

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.

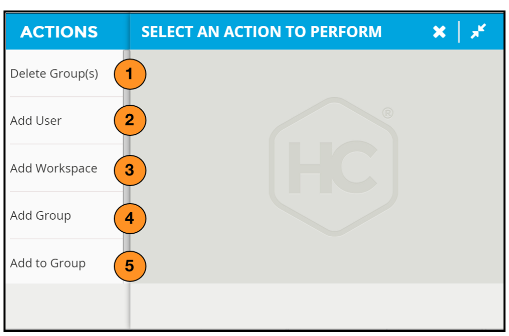


FIGURE 4-23: User Group Actions

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.

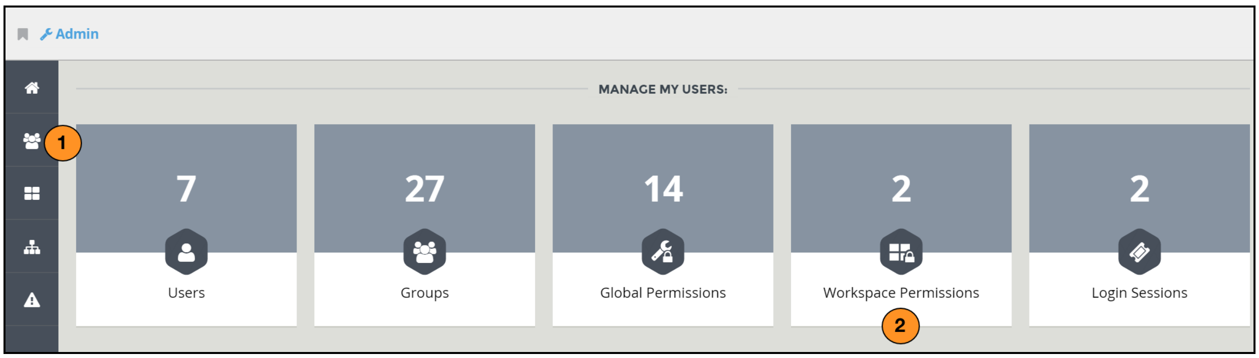


FIGURE 4-24: Workspace Permissions

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.

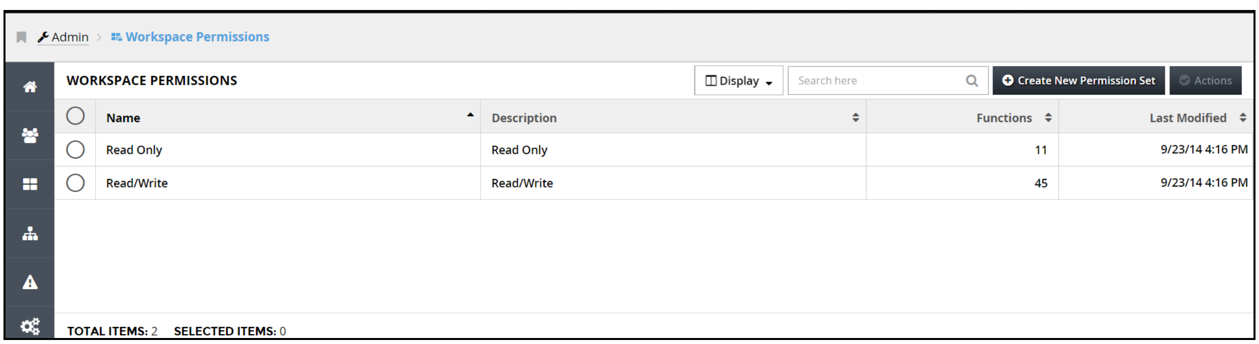


FIGURE 4-25: Workspace Permissions List

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.

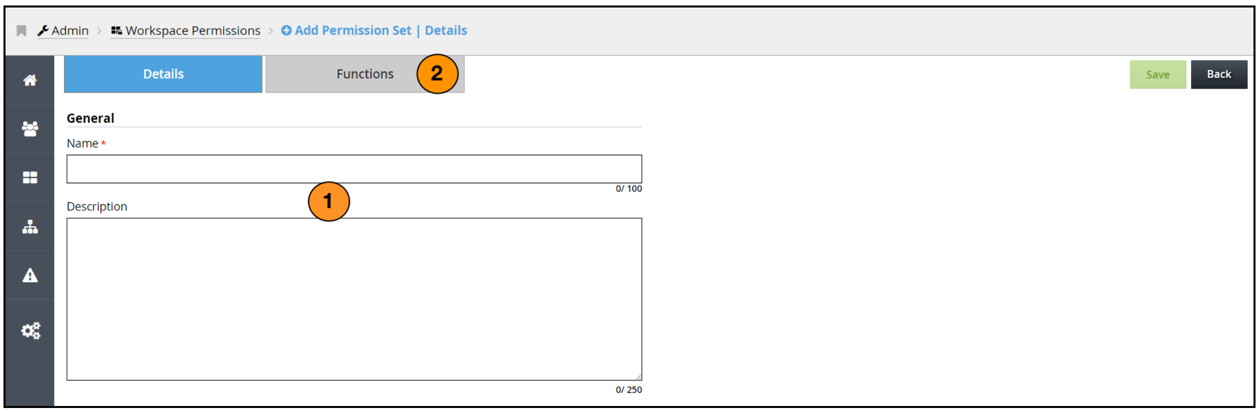


FIGURE 4-27: Create New Permission Set - Details

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.

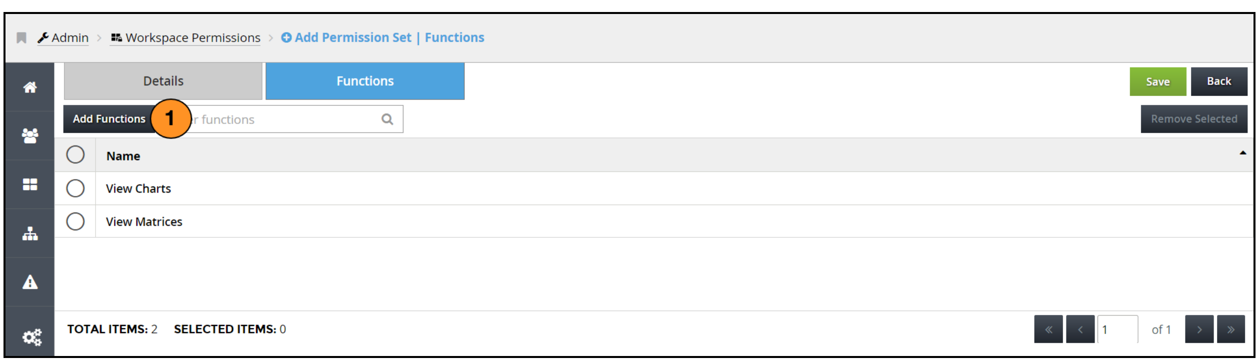


FIGURE 4-28: Create A Permission Set - Functions

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.

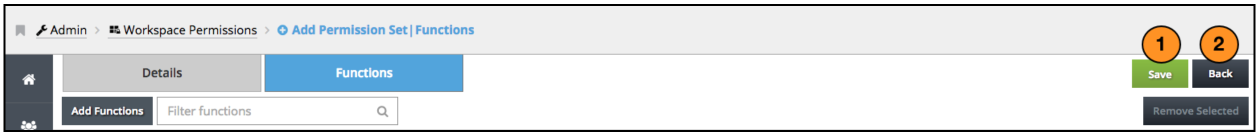


FIGURE 4-29: Save and Back buttons

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.

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.

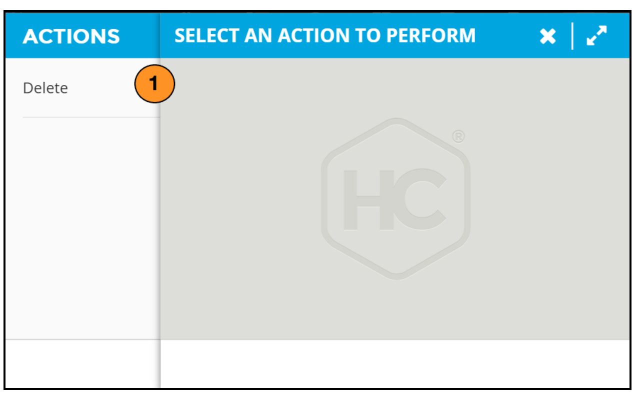


FIGURE 4-31: Workspace Permission Set - Other Actions

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.

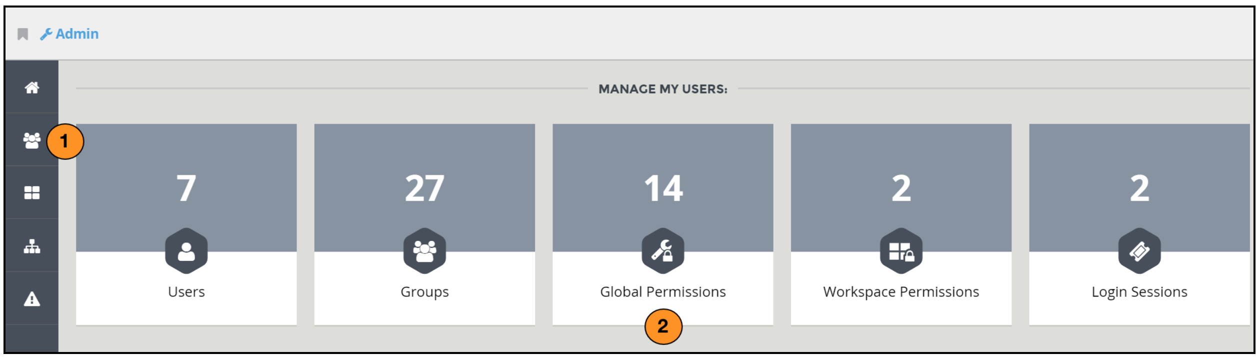


FIGURE 4-32: Global Permissions

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.

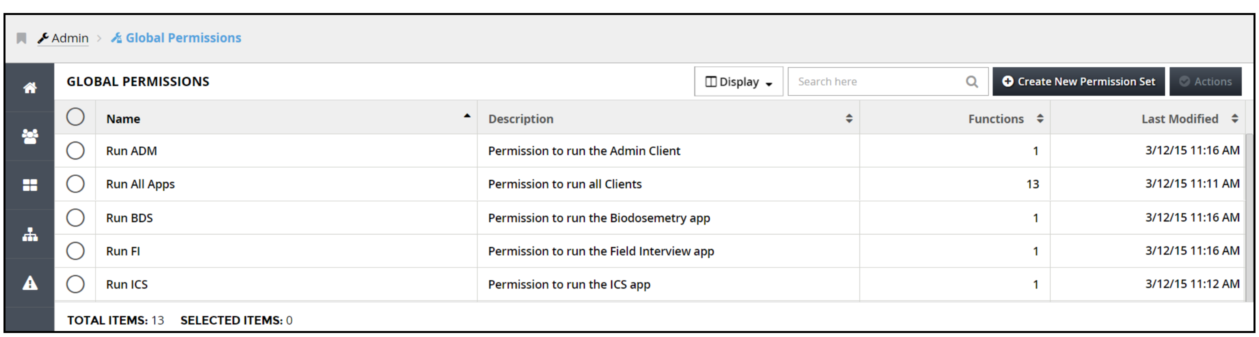


FIGURE 4-33: Global Permissions List

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.

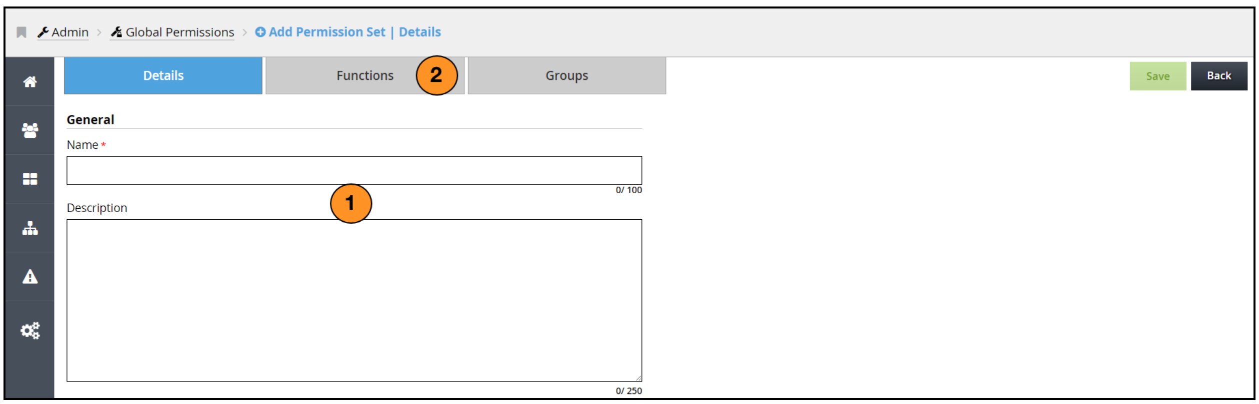


FIGURE 4-35: Create New Permission Set - Details

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.

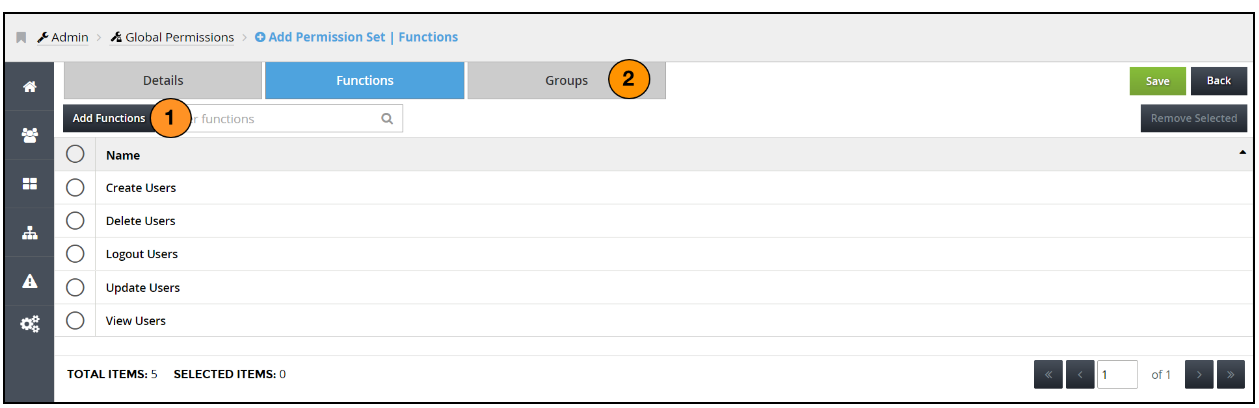


FIGURE 4-36: Create A Permission Set - Functions

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.

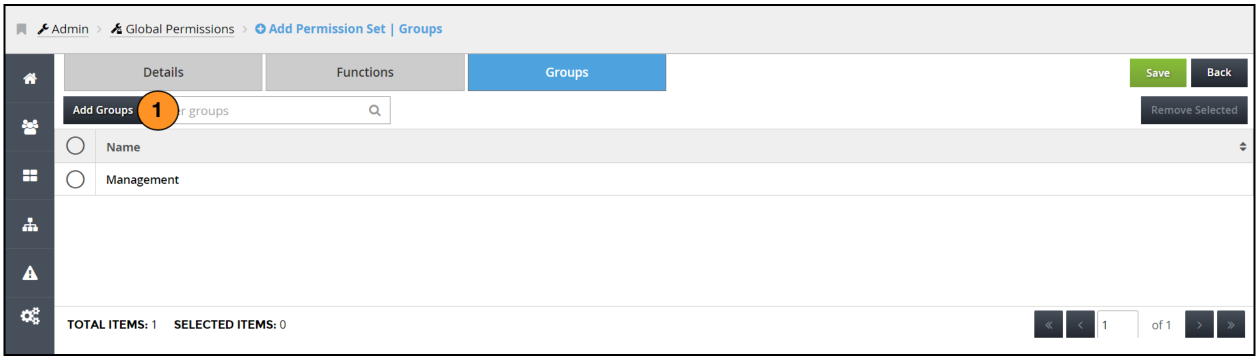


FIGURE 4-37: Create Permission Set - Groups

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.

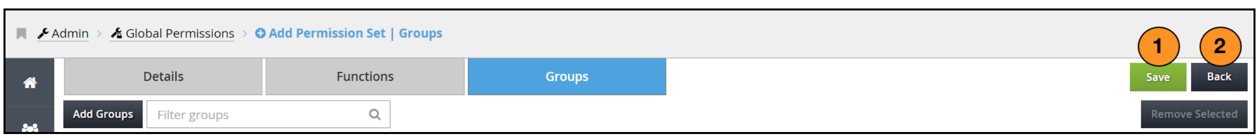


FIGURE 4-38: Save and Back buttons

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.

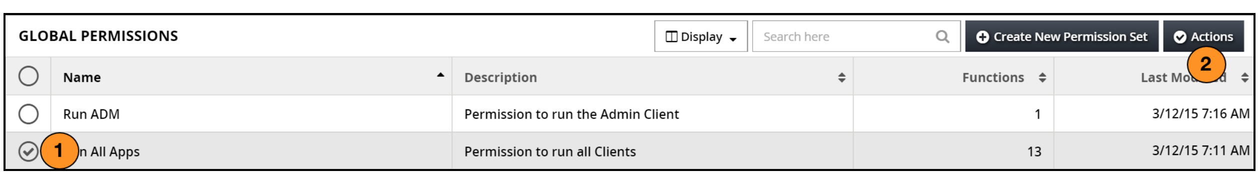


FIGURE 4-39: Actions Button

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

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

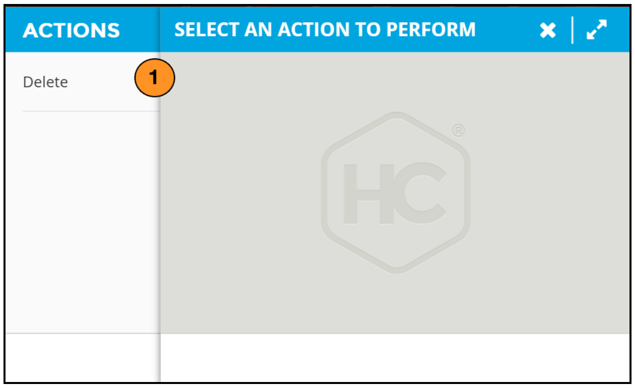


FIGURE 4-40: Permission Set - Other Actions

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.

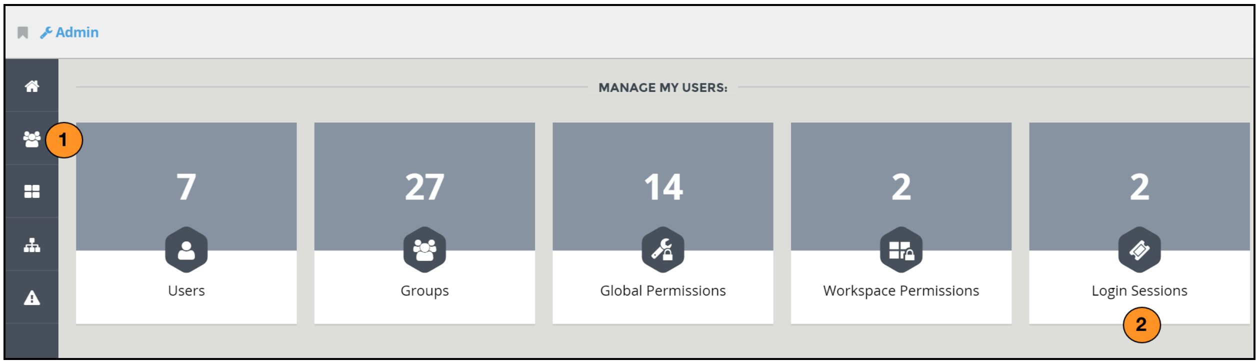


FIGURE 4-41: Login Sessions

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.

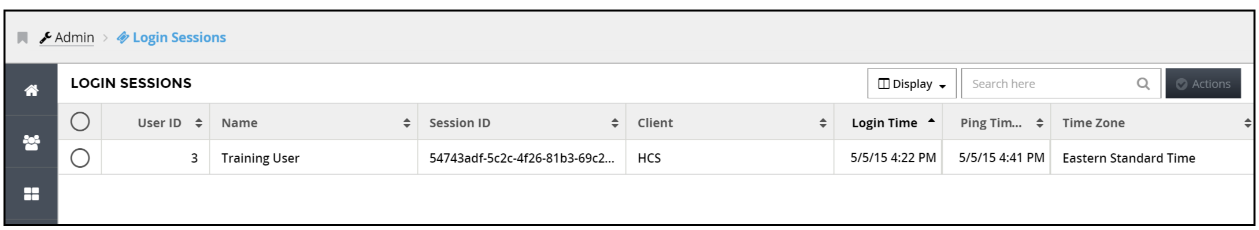


FIGURE 4-42: Login Sessions list

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.

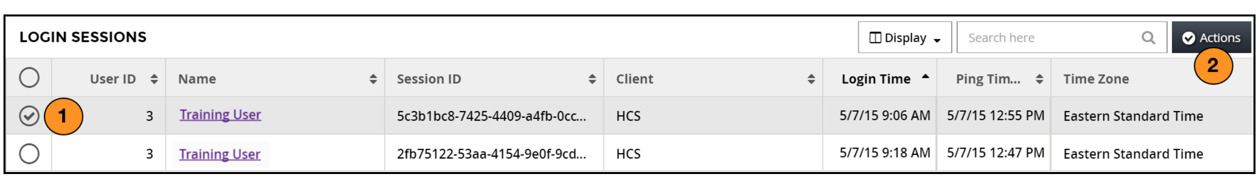


FIGURE 4-43: Actions Button

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

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

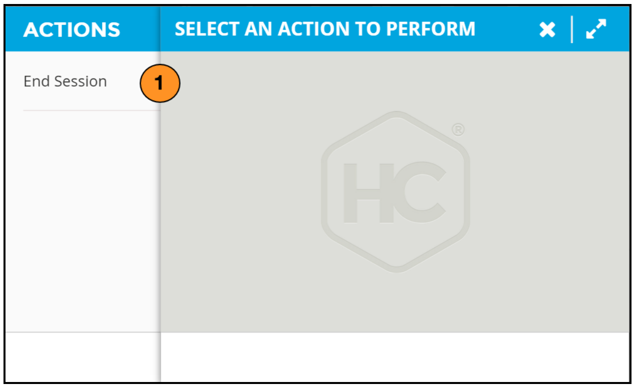


FIGURE 4-44: Logon Sessions - Other Actions

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.

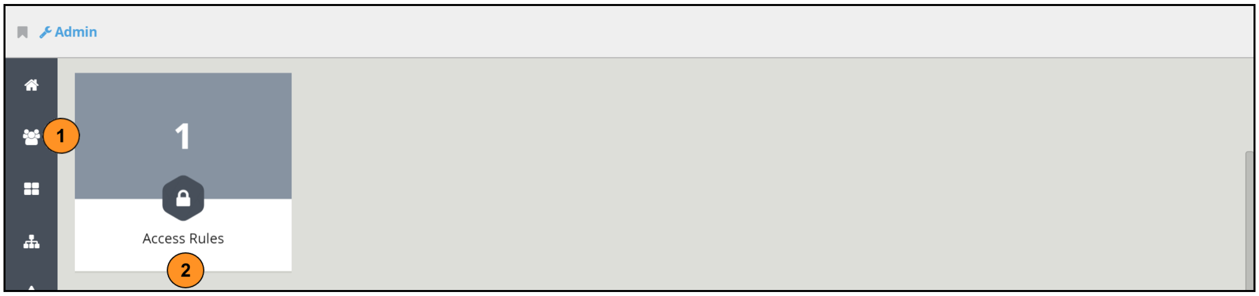


FIGURE 4-45: Access Rules

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

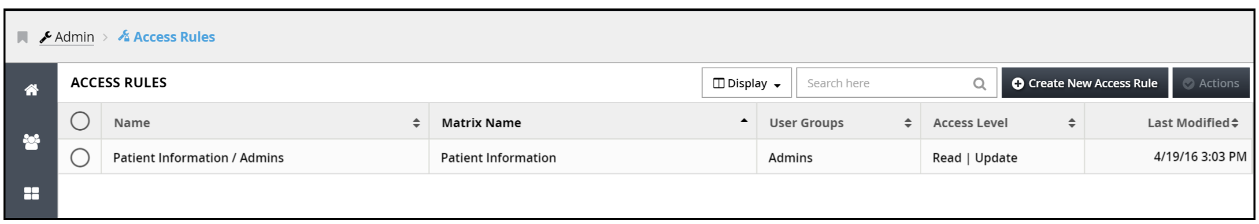


FIGURE 4-46: Login Sessions list

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.

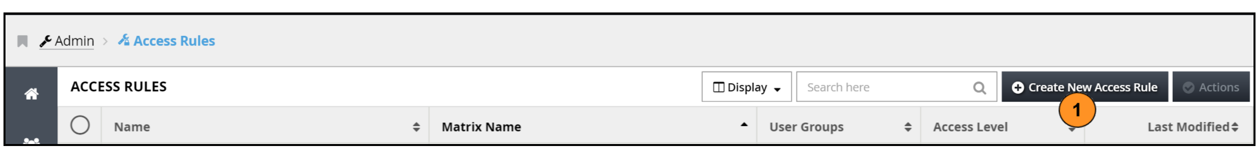


FIGURE 4-47: Create New Access Rule

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

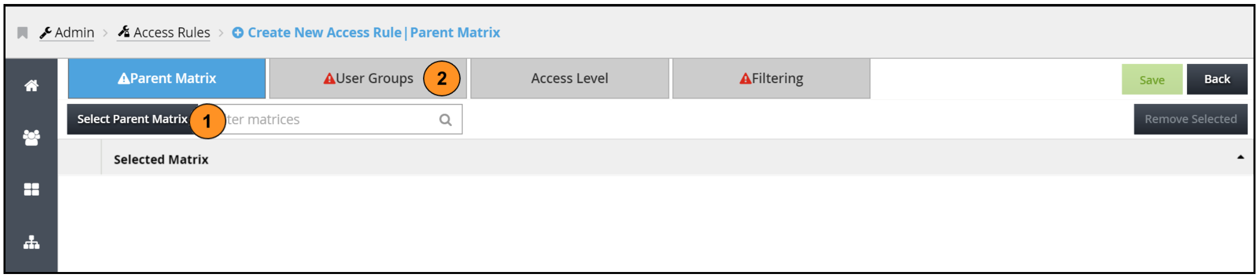


FIGURE 4-48: Access Rules - Parent Matrix

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.

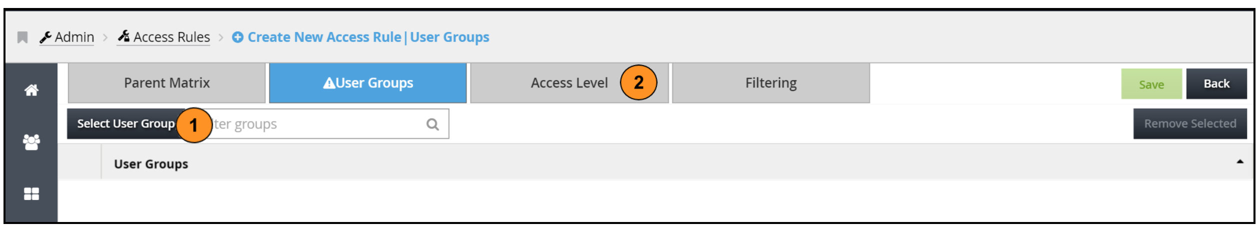


FIGURE 4-49: Access Rules - User Groups

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.

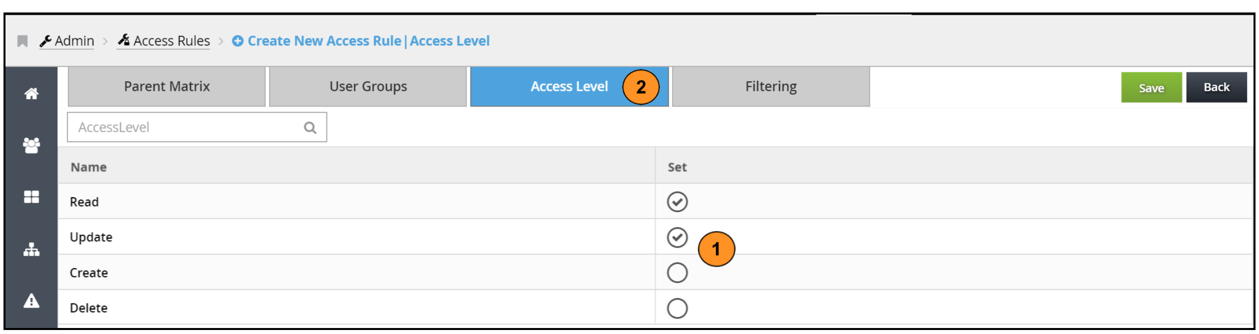


FIGURE 4-50: Access Rules - Access Level

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.

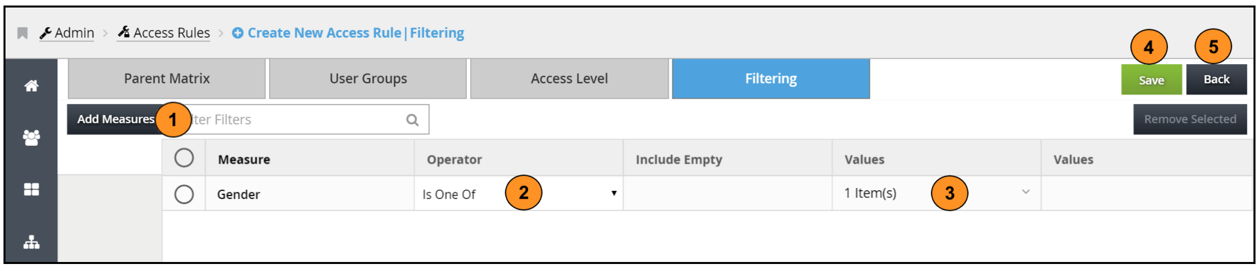


FIGURE 4-51: Access Rules - Filtering

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.

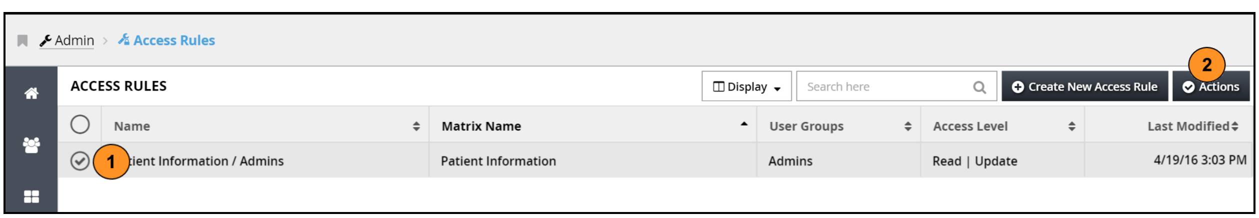


FIGURE 4-52: Actions Button

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

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

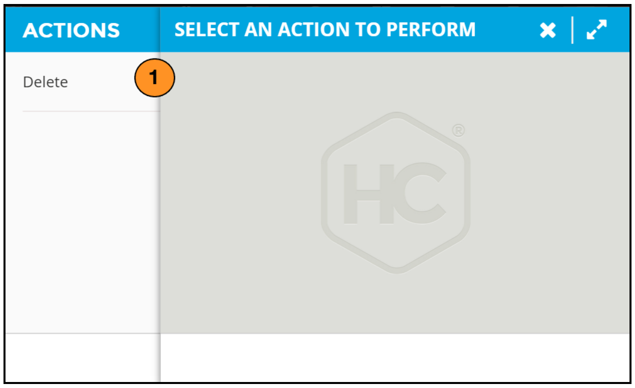


FIGURE 4-53: Access Rulest - Other Actions

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.

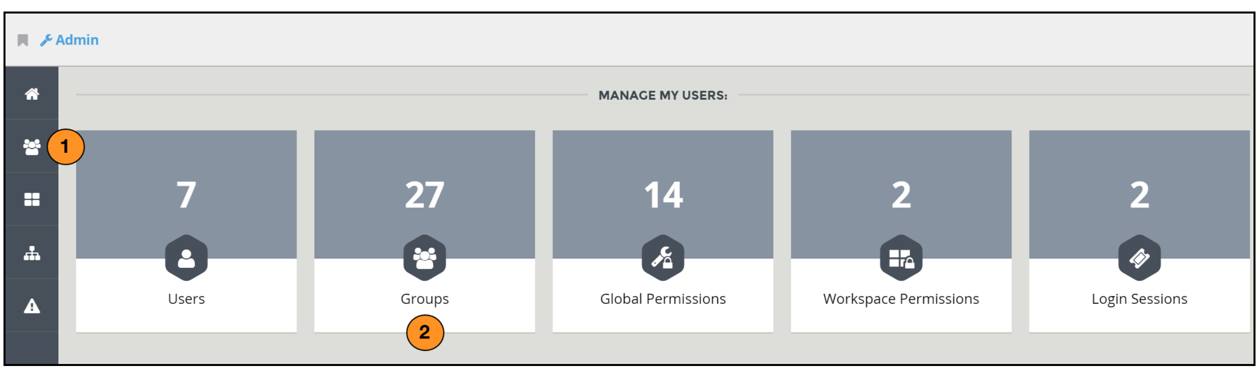


FIGURE 4-54: Groups

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.

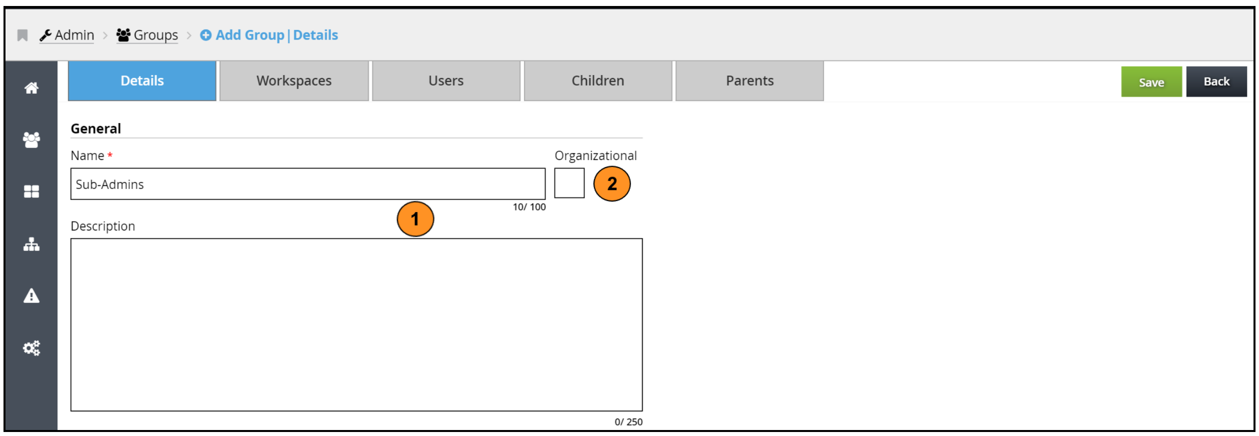


FIGURE 4-56: Add Group

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.

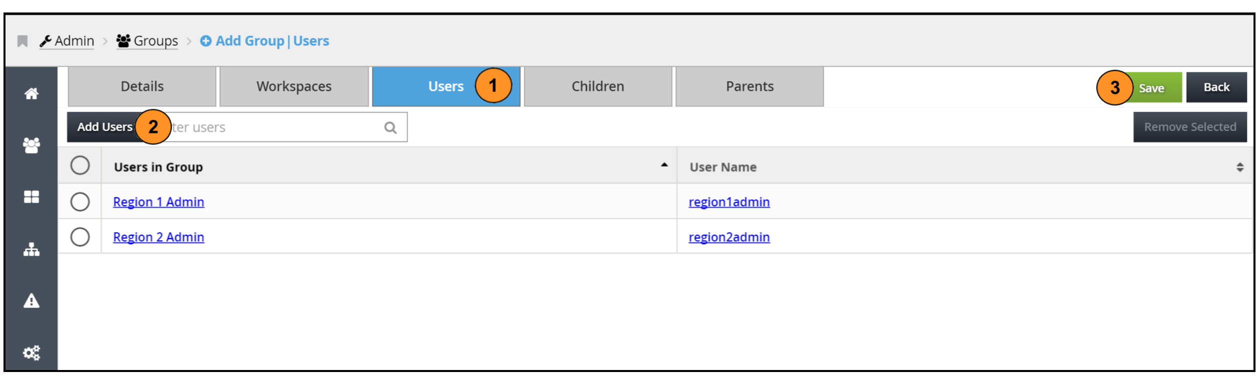


FIGURE 4-57: Add Users to Sub-Admin group

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.

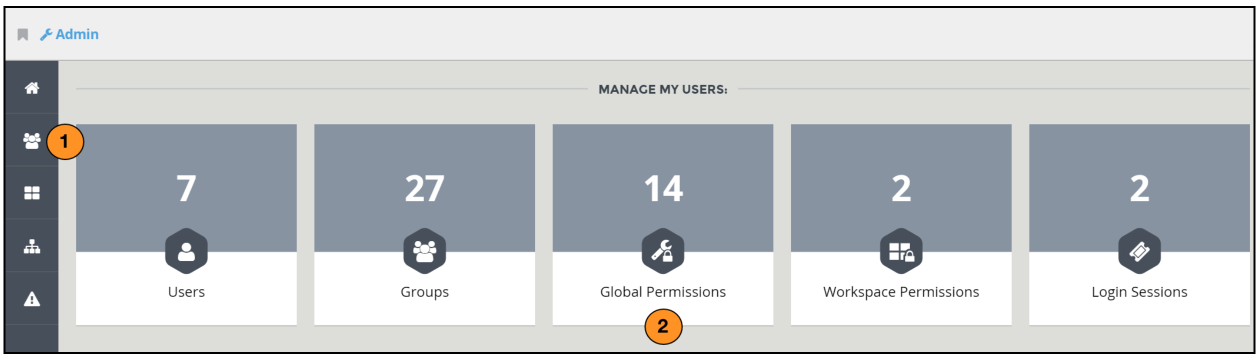


FIGURE 4-58: Global Permissions

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.

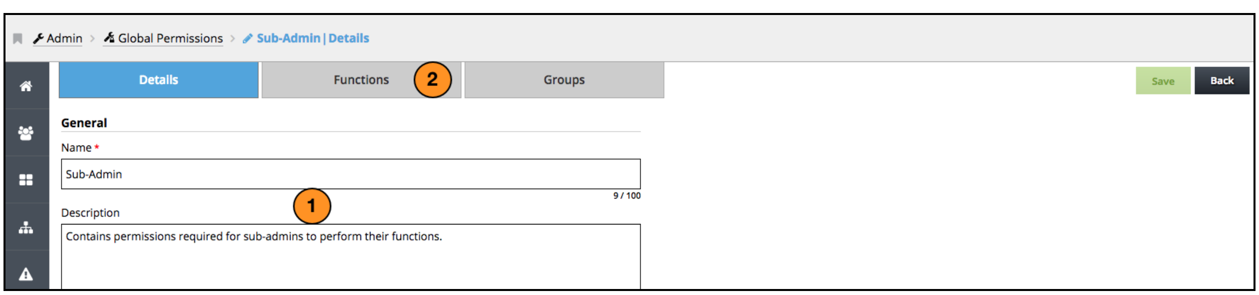


FIGURE 4-60: Create New Permission Set - Details

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.

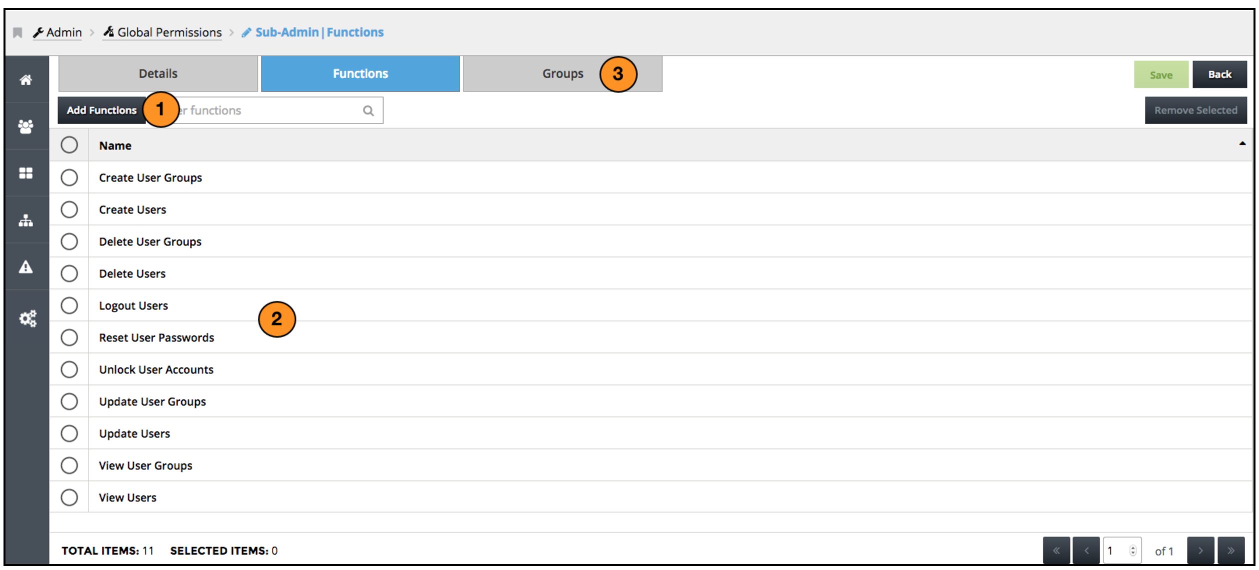


FIGURE 4-61: Create A Permission Set - Functions

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.

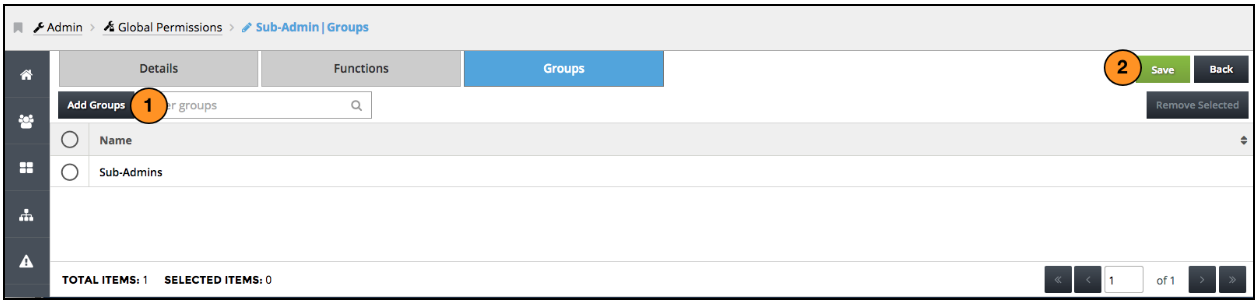


FIGURE 4-62: Add Sub-Admin user group to permission set

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.

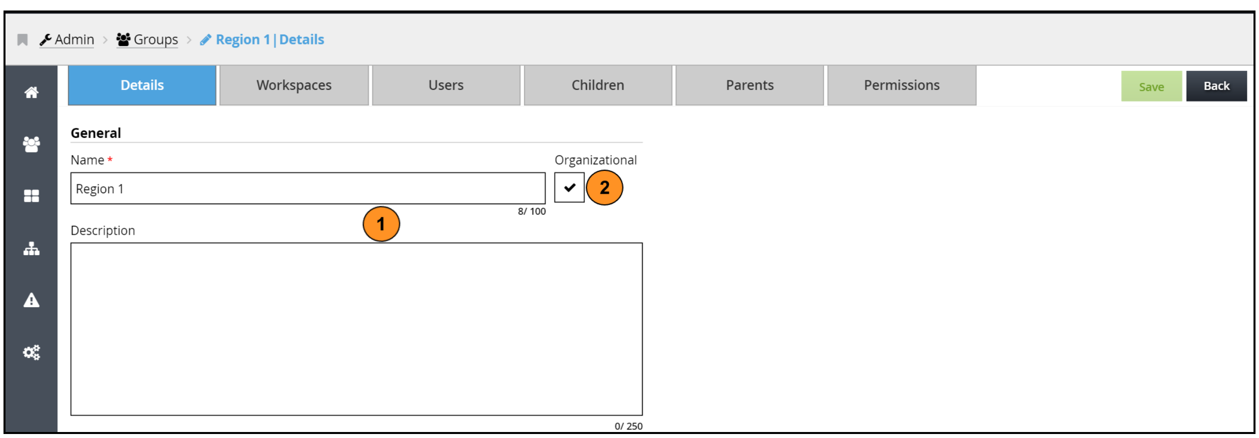


FIGURE 4-63: Add Group - Details

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.

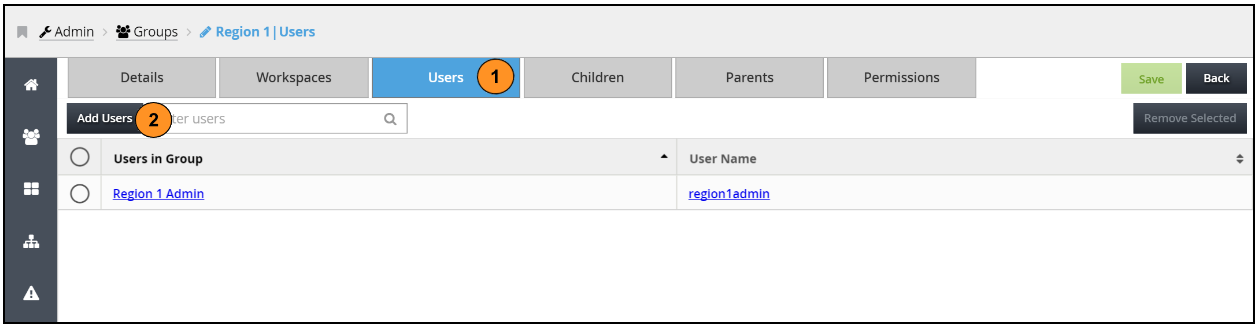


FIGURE 4-64: Add Group - Users

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.

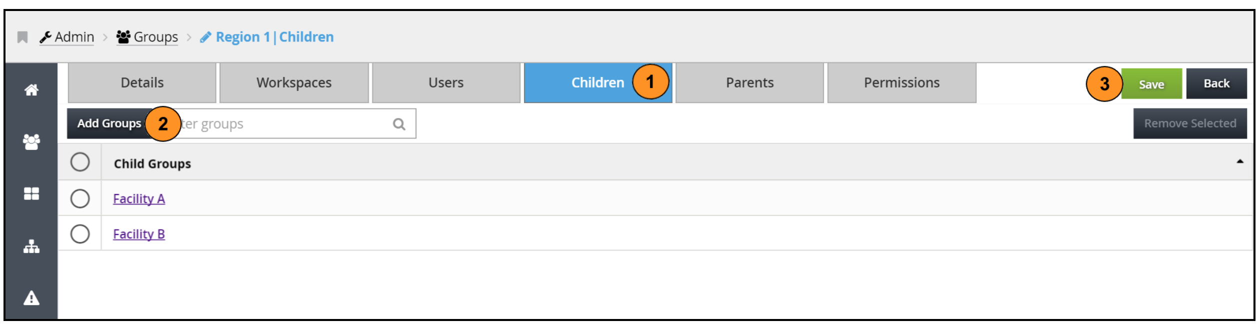


FIGURE 4-65: Add Group - Member Groups

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.

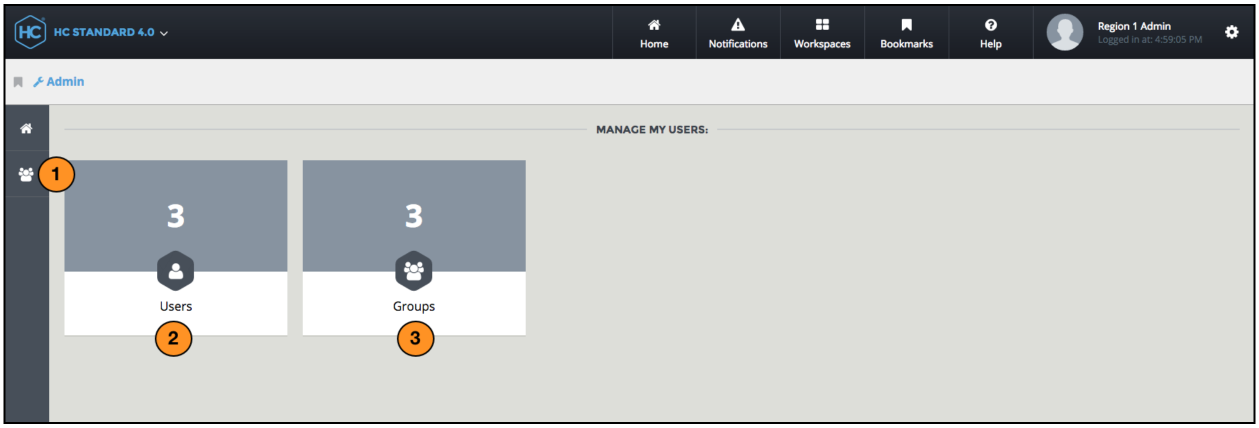


FIGURE 4-66: Sub-Admin Tools

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.

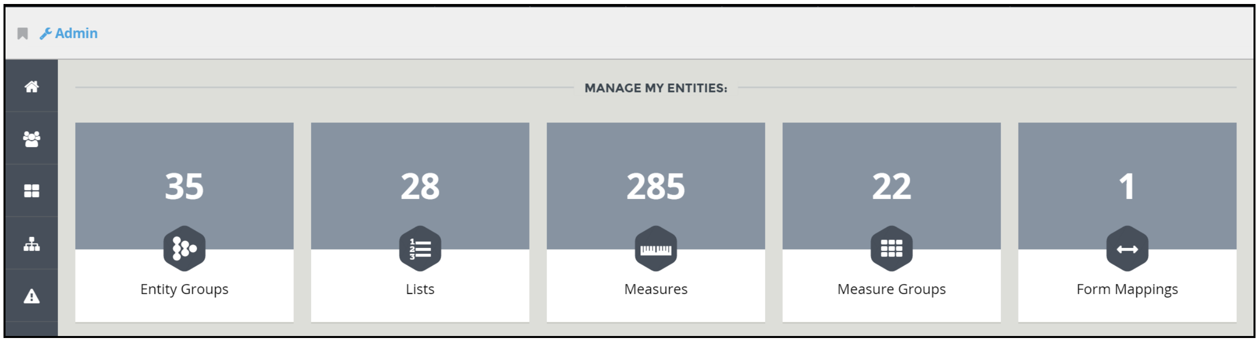


FIGURE 5-1: Entities

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.

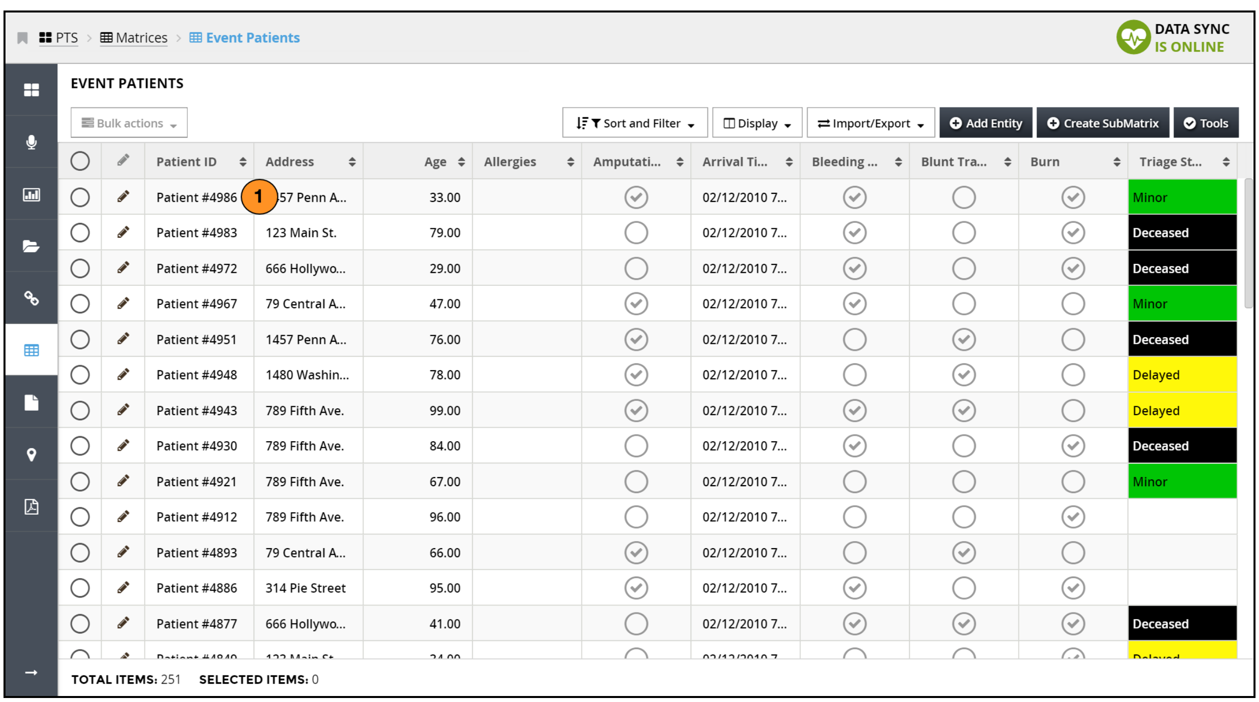


FIGURE 5-2: Entities in a matrix

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.

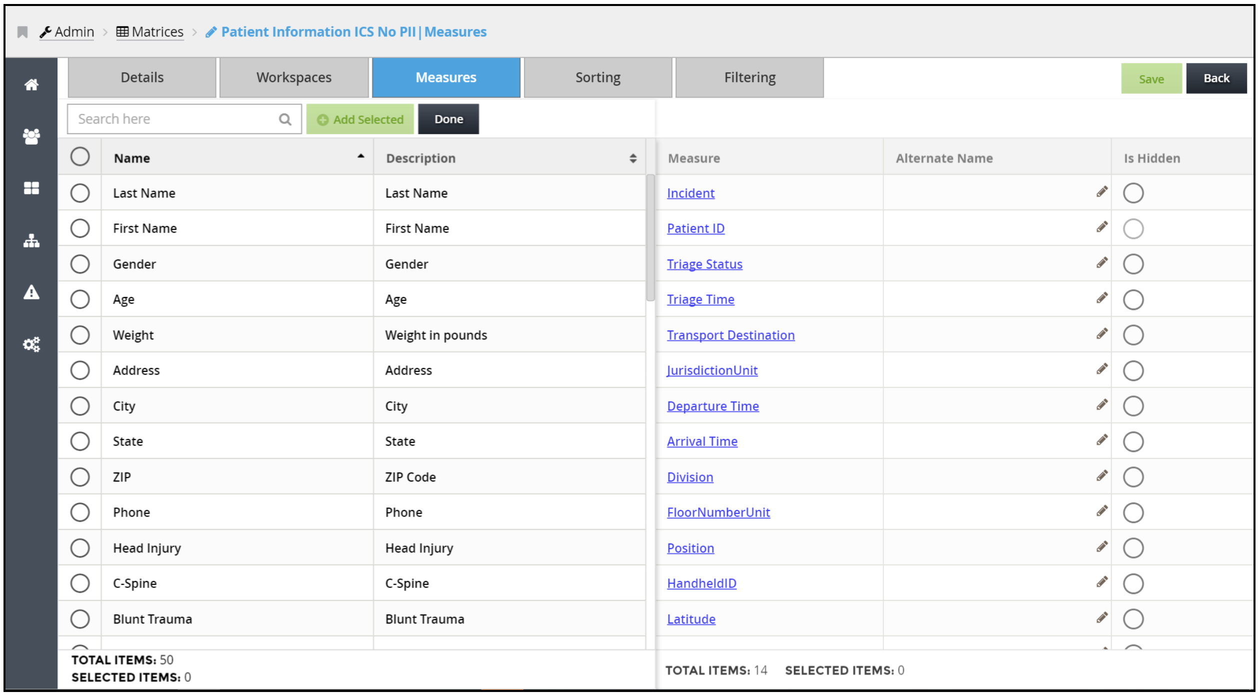


FIGURE 5-3: List of measures in a matrix

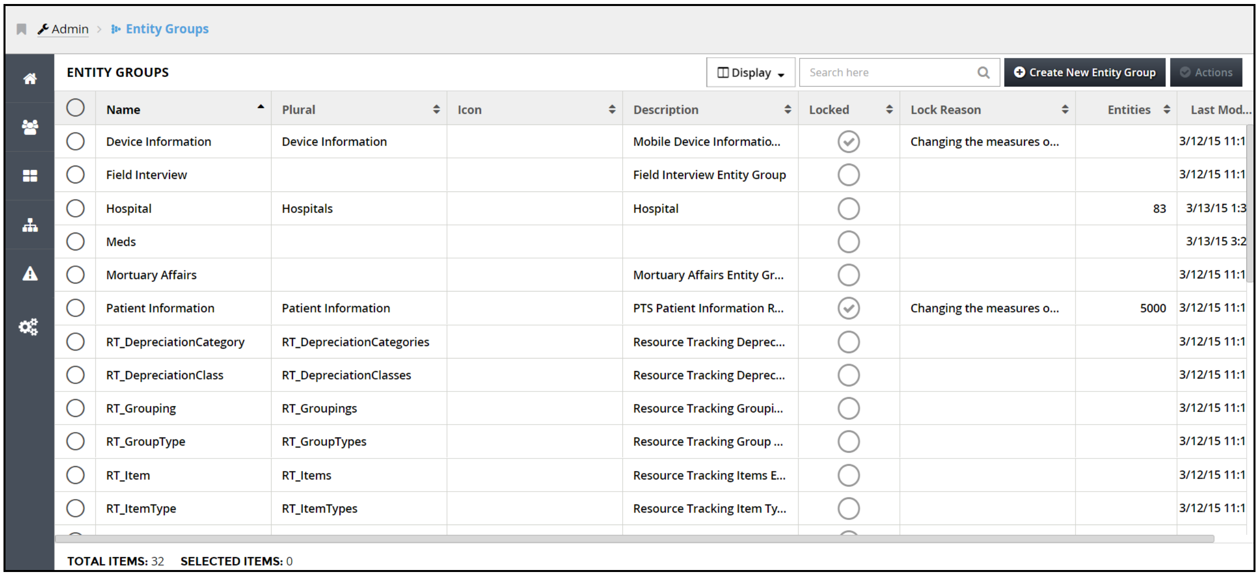
Note: It can be helpful to think of an **Entity** as a box containing useful information that needs to be tracked and a **Measure** as one of the items of interest in the box.

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.



Admin > Entity Groups

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...	✓	Changing the measures o...		3/12/15 11:1
Field Interview			Field Interview Entity Group				3/12/15 11:1
Hospital	Hospitals		Hospital			83	3/13/15 1:3
Meds							3/13/15 3:2
Mortuary Affairs			Mortuary Affairs Entity Gr...				3/12/15 11:1
Patient Information	Patient Information		PTS Patient Information R...	✓	Changing the measures o...	5000	3/12/15 11:1
RT_DepreciationCategory	RT_DepreciationCategories		Resource Tracking Deprec...				3/12/15 11:1
RT_DepreciationClass	RT_DepreciationClasses		Resource Tracking Deprec...				3/12/15 11:1
RT_Grouping	RT_Groupings		Resource Tracking Groupi...				3/12/15 11:1
RT_GroupType	RT_GroupTypes		Resource Tracking Group ...				3/12/15 11:1
RT_Item	RT_Items		Resource Tracking Items E...				3/12/15 11:1
RT_ItemType	RT_ItemTypes		Resource Tracking Item Ty...				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).

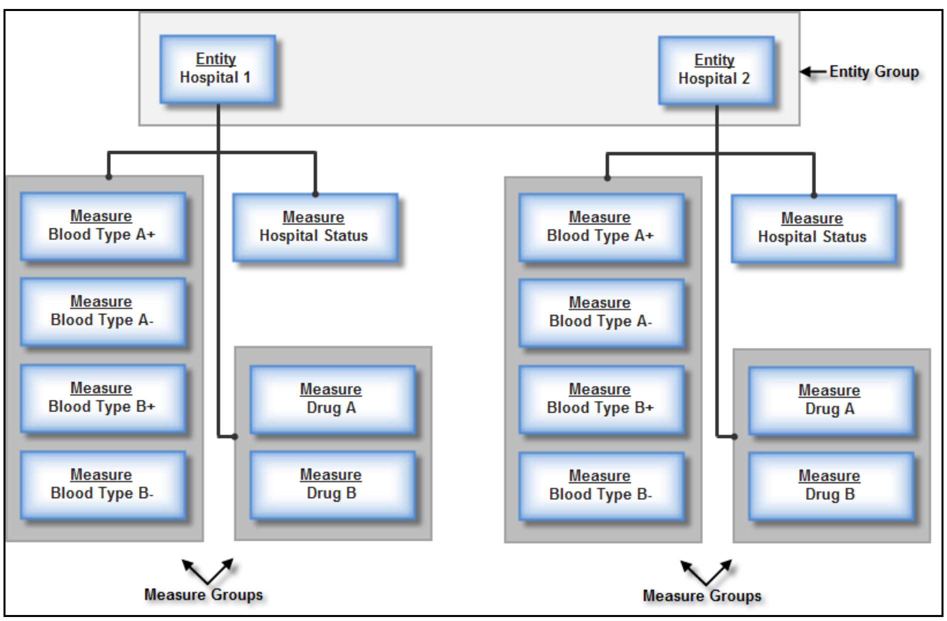


FIGURE 5-5: Entity Relationship Diagram

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.

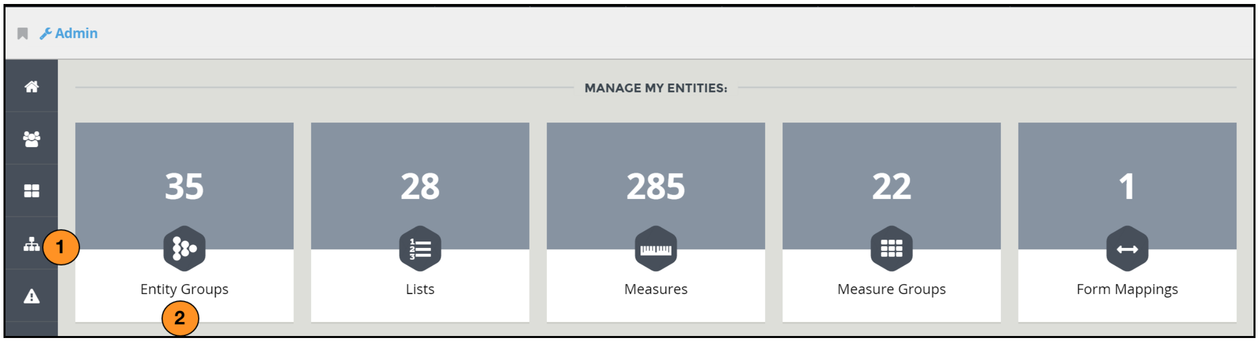
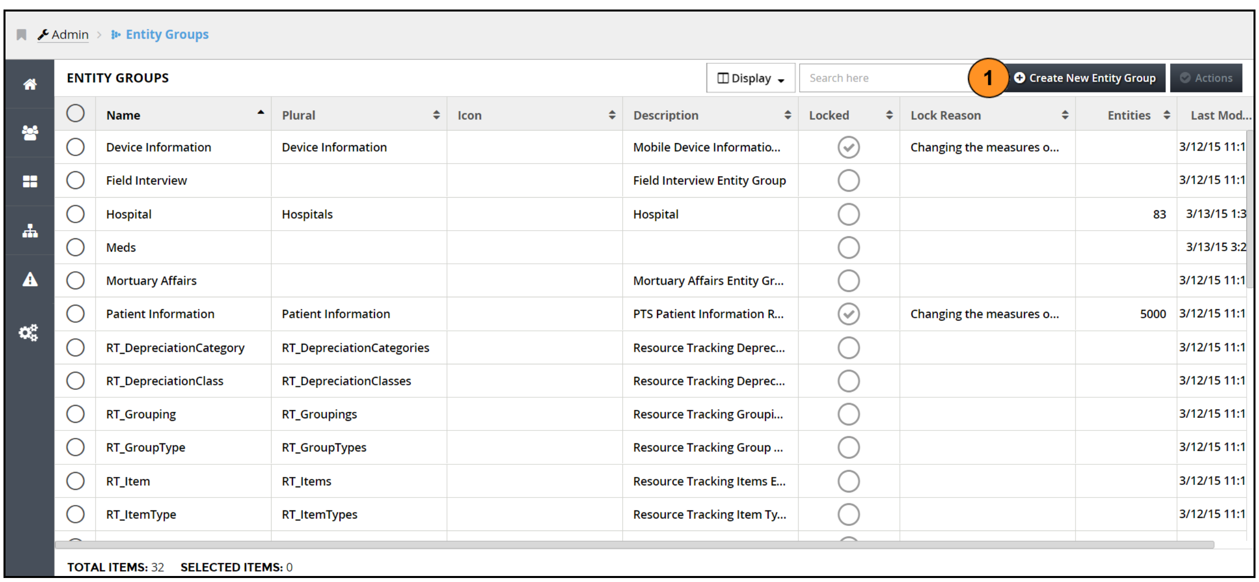


FIGURE 5-6: Entity Groups button

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.



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

TOTAL ITEMS: 32 SELECTED ITEMS: 0

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.

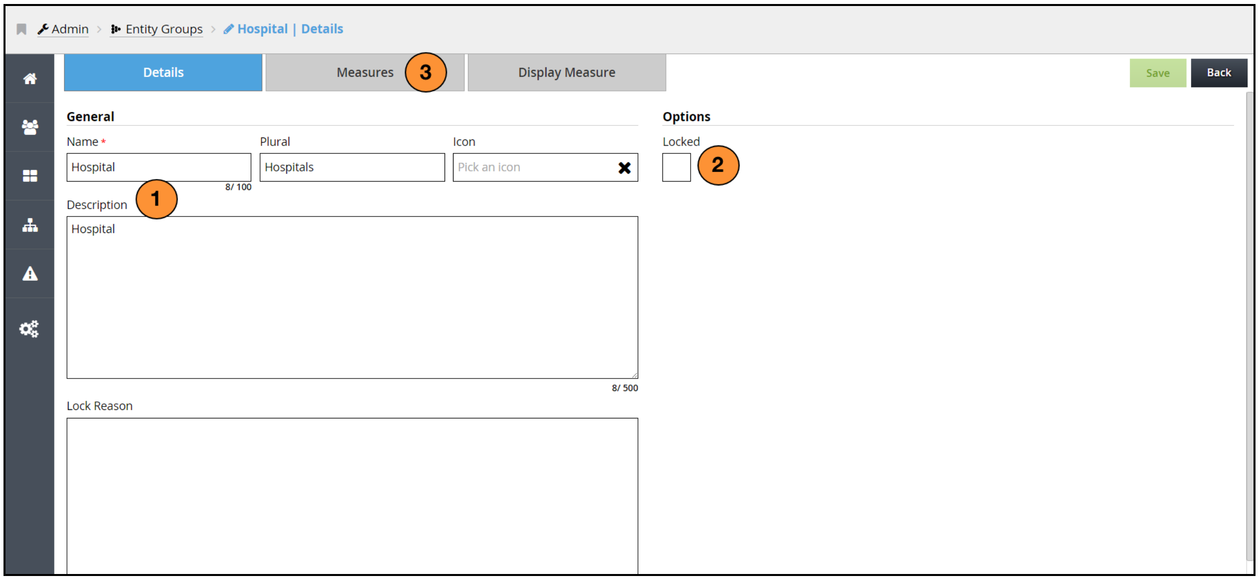


FIGURE 5-8: Edit Entity Group Dialog

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

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

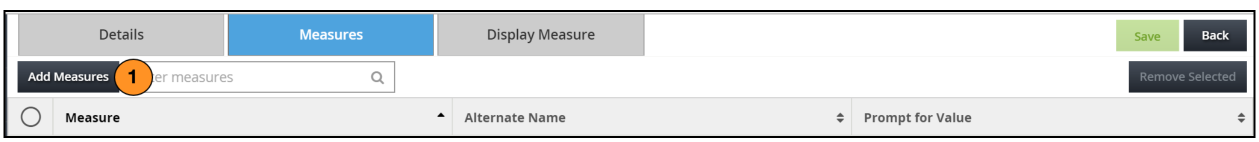


FIGURE 5-9: Add Measures button

Modifying which measures are added can be accomplished by moving them. For more information, ssee "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.

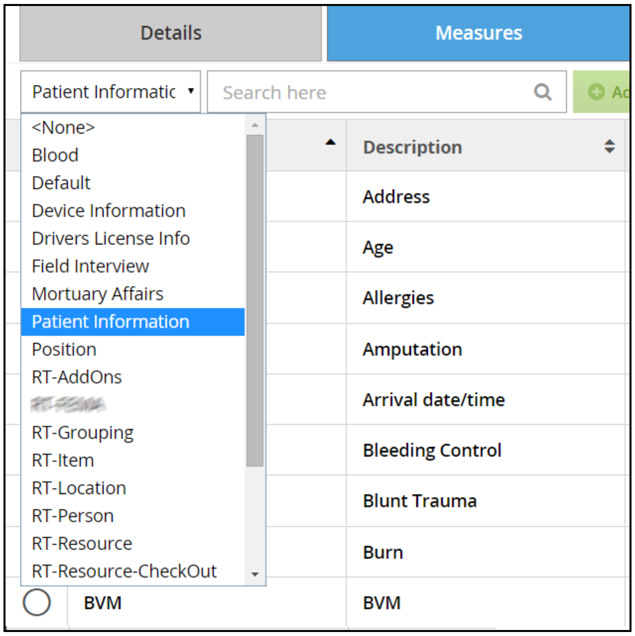


FIGURE 5-10: Group Filter Dropdown

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.

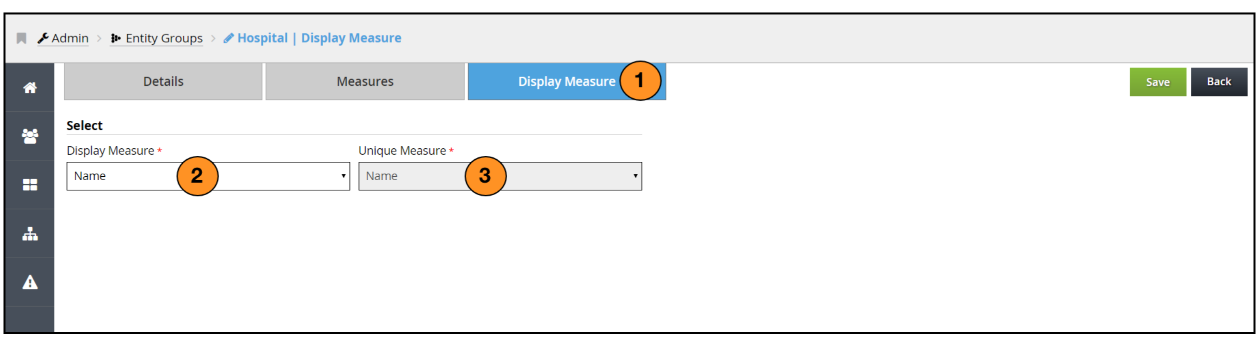


FIGURE 5-11: Edit Entity Group - Display Measure

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.

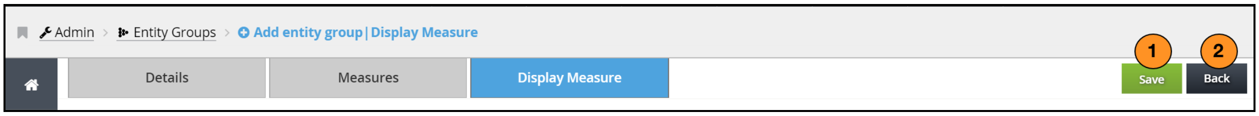


FIGURE 5-12: Save and Back Buttons

5 - 1.1 Sections

Sections allow an Administator 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**.

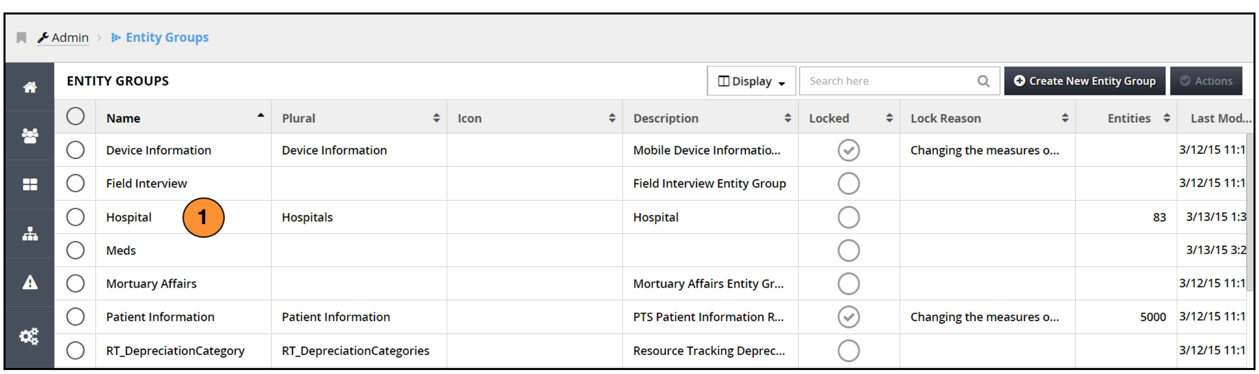


FIGURE 5-14: Select Entity Group

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.

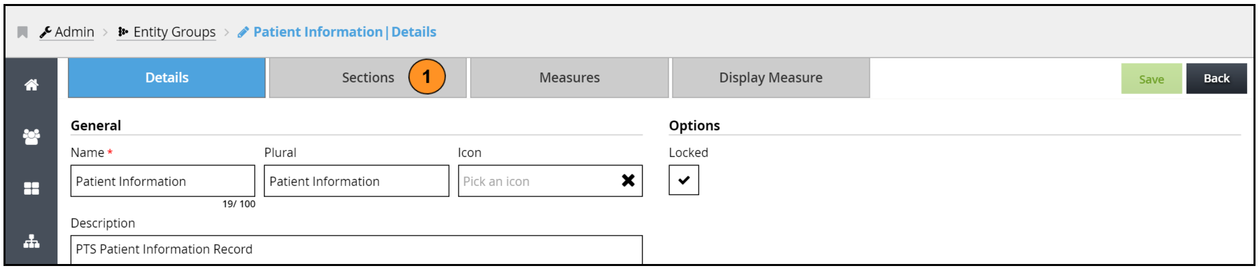


FIGURE 5-15: Edit Entity Group - Details

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.

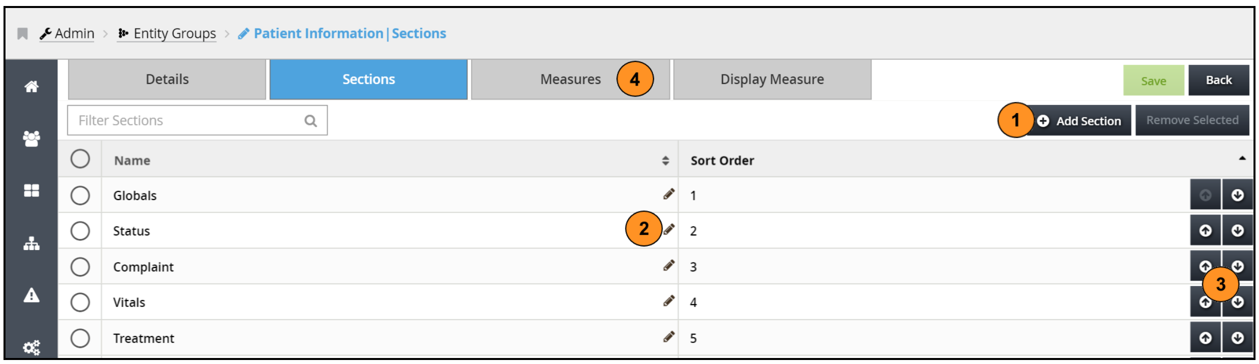


FIGURE 5-16: Edit Entity Group - Sections

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.

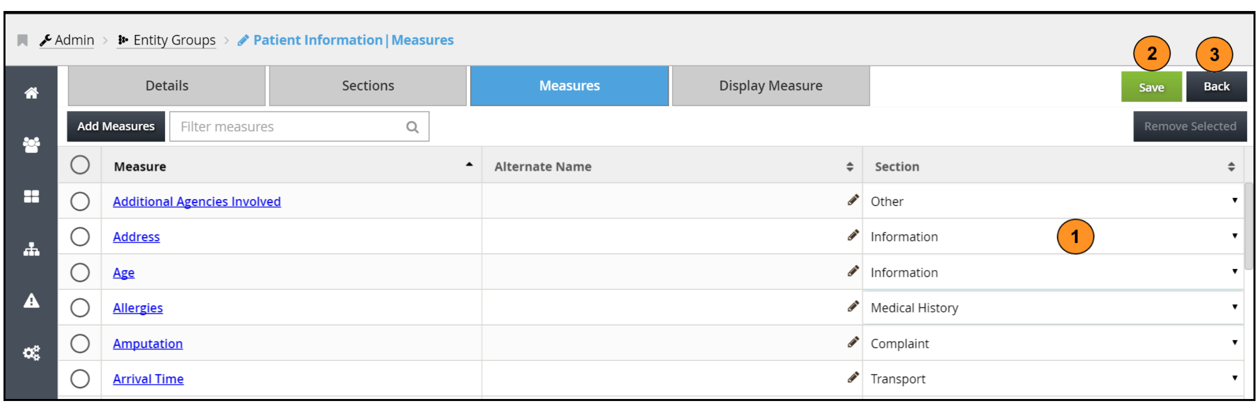


FIGURE 5-17: Edit Entity Group - Measures in Sections

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.

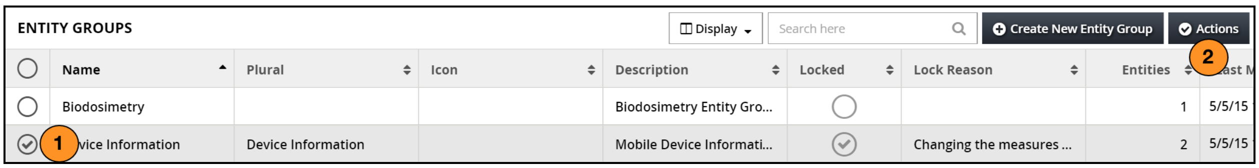


FIGURE 5-18: Actions Button

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

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

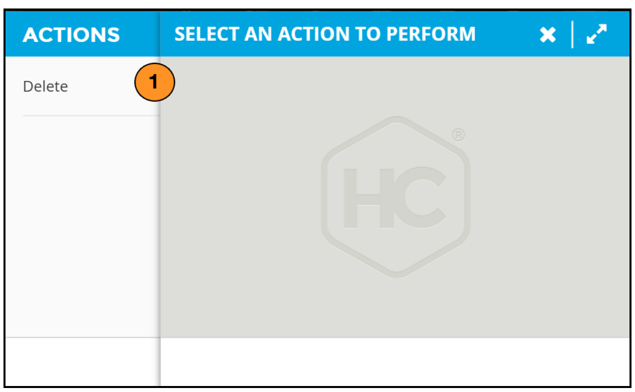


FIGURE 5-19: Entity Group - Other Actions

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.

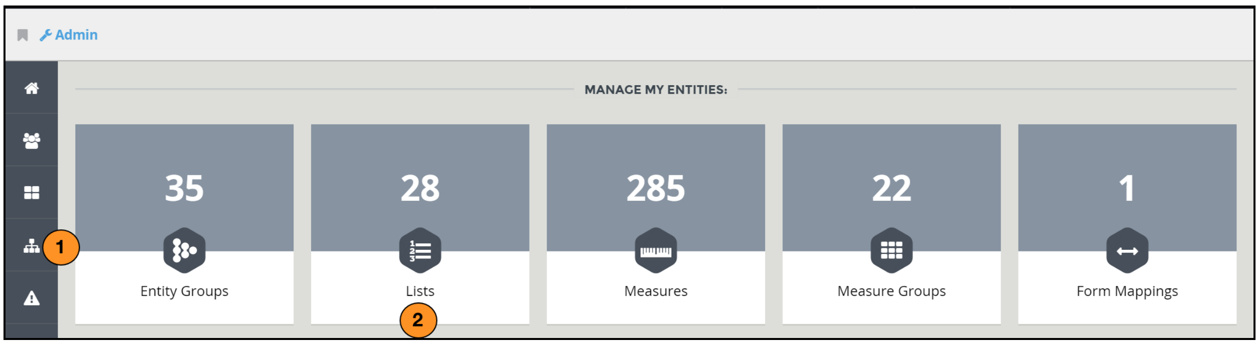


FIGURE 5-20: Lists

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

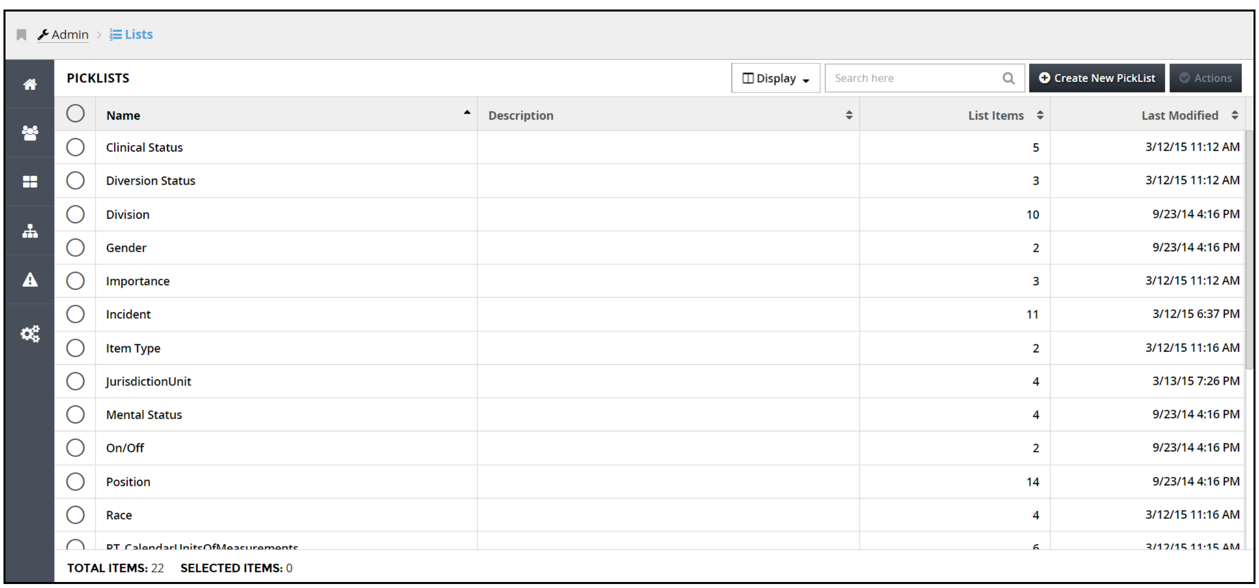


FIGURE 5-21: Lists List

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.

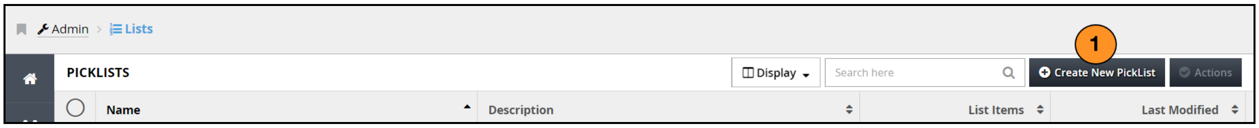


FIGURE 5-22: Create PickList Button

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.

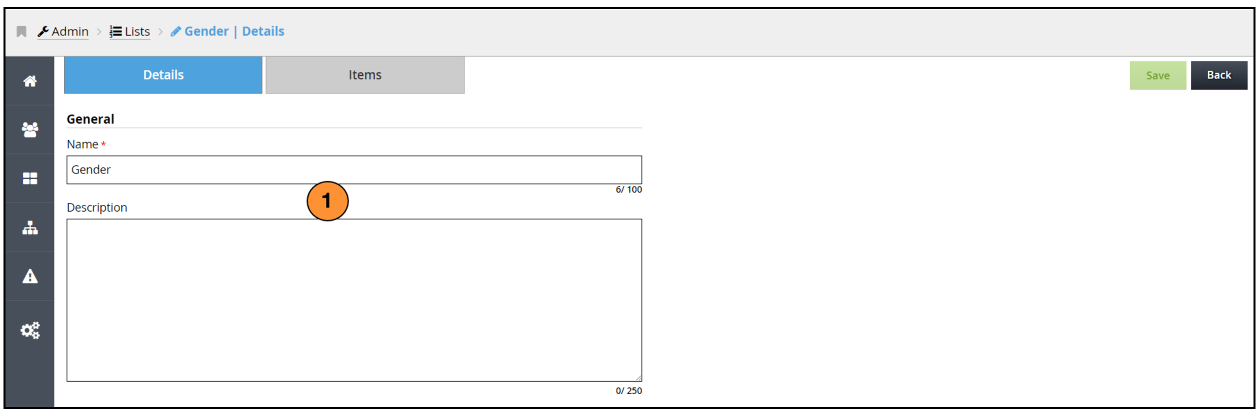


FIGURE 5-23: Creating PickList - Details

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.

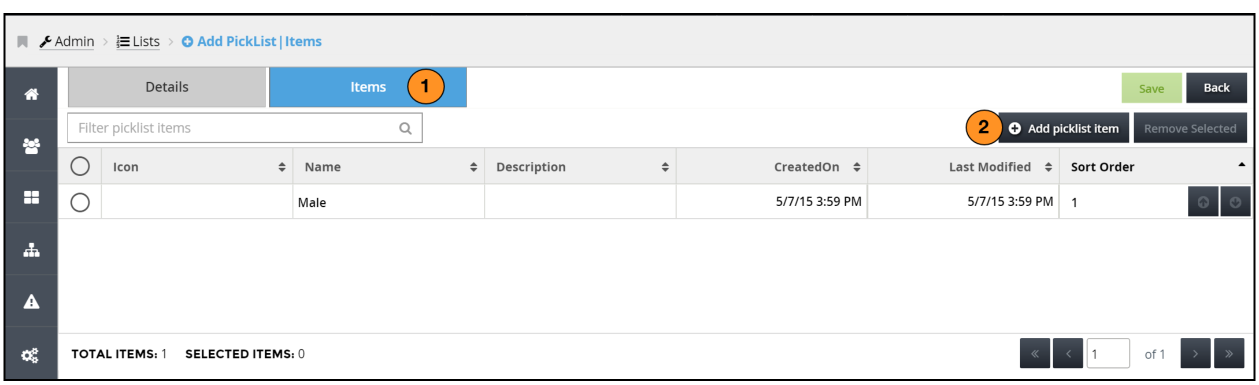


FIGURE 5-24: Create PickList - Items

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.

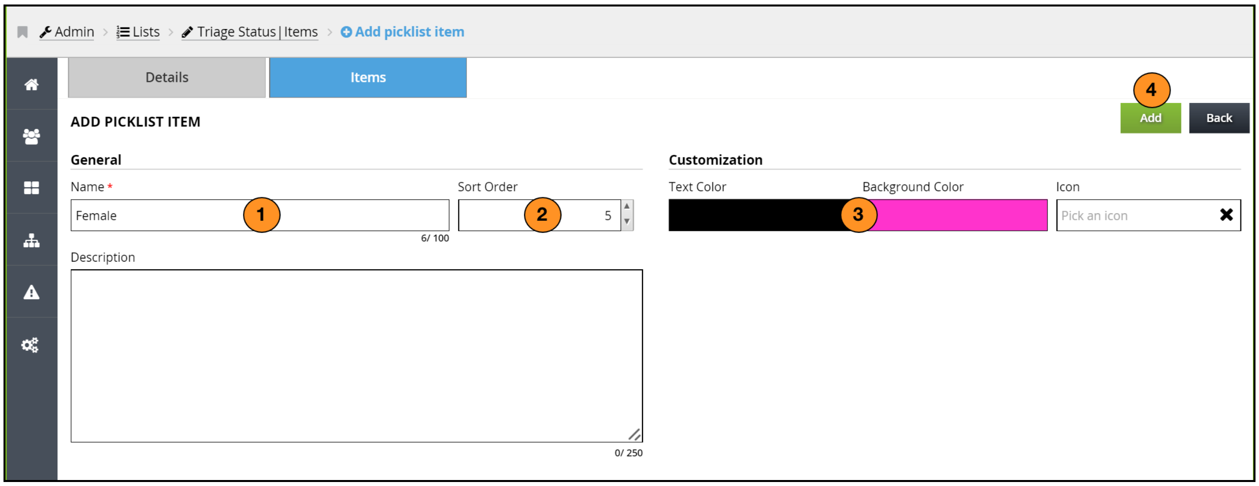


FIGURE 5-25: Adding an Item to a PickList

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.

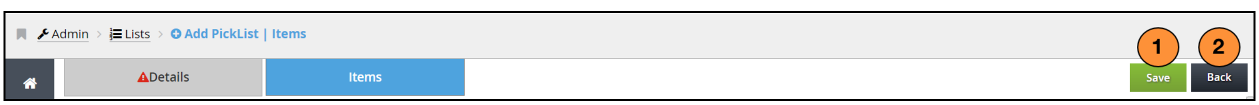


FIGURE 5-26: Save and Back Buttons

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.

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.

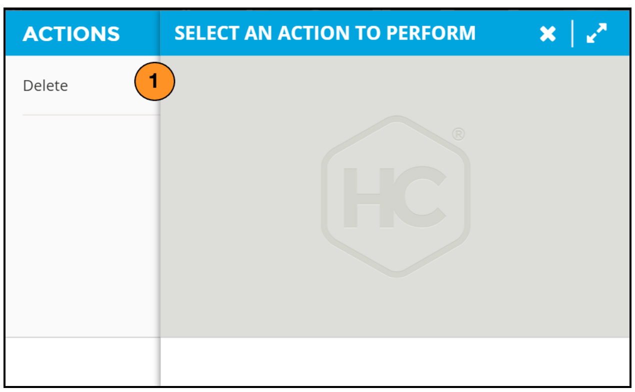


FIGURE 5-28: Lists - Other Actions

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.

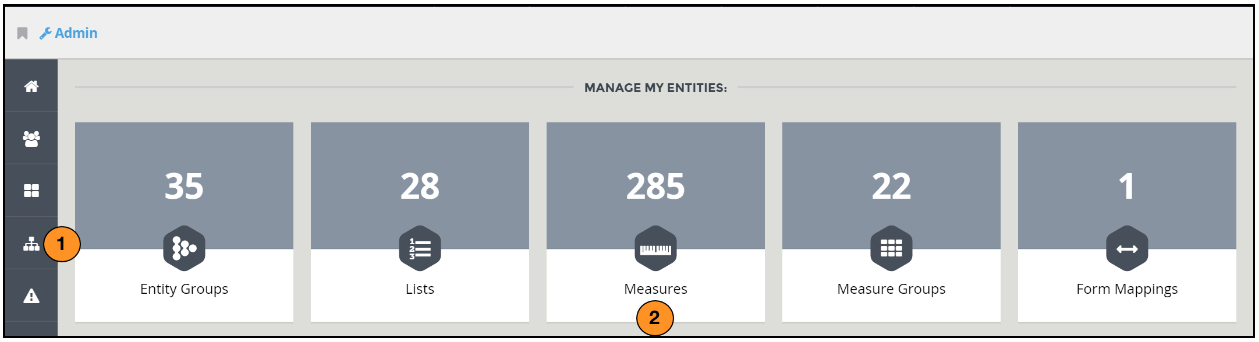
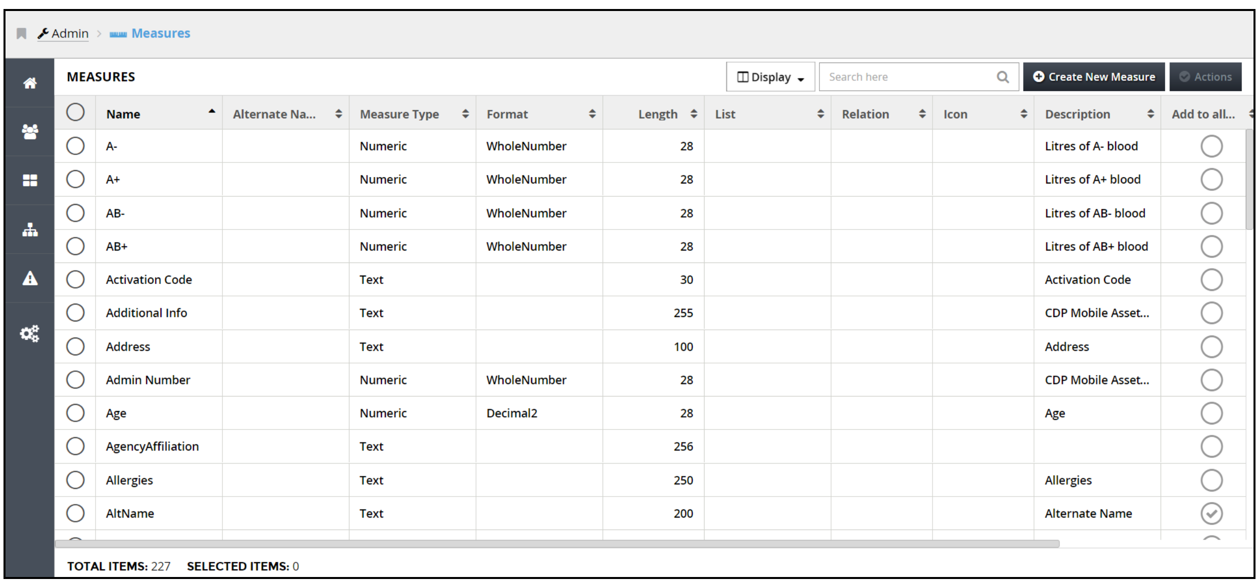


FIGURE 5-29: Measures

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


Admin > Measures

MEASURES

Display | Search here | Create New Measure | Actions

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

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.

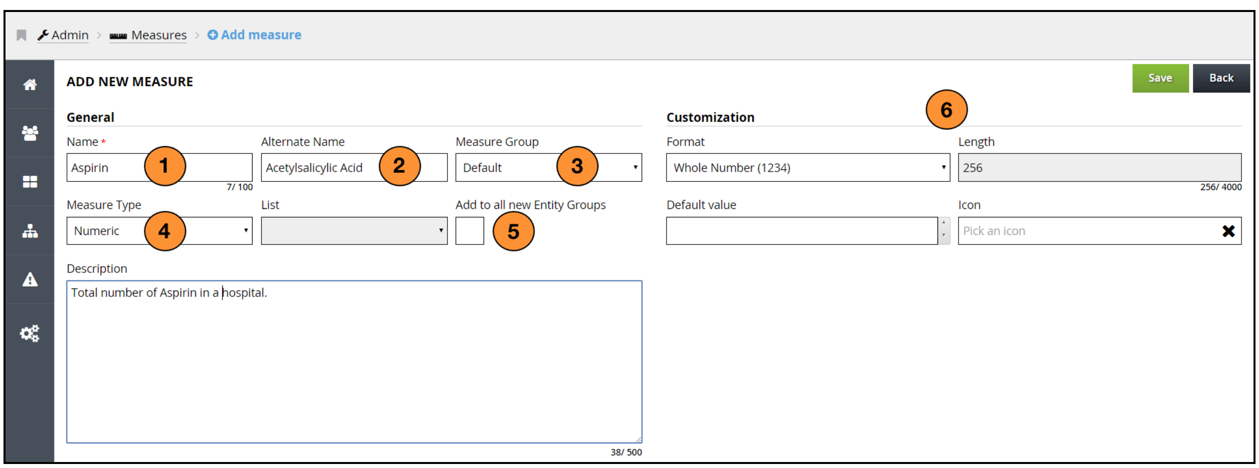


FIGURE 5-32: Creating a new measure.

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

Measure Type	Format
Checkbox	• Not Applicable
Date/Time	• Date Only (MM/DD/YY) • Date and Time (MM/DD/YY HH:MM:SS) • Time Only (HH:MM:SS)
Numeric	• Whole Number (1234) • Percent (12%) • Decimal (1234.00) • Coordinate (25.000023) • Currency ($1234.00) • General (123.456)
List	• Not Applicable
Text	• Not Applicable
Relation	• 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.

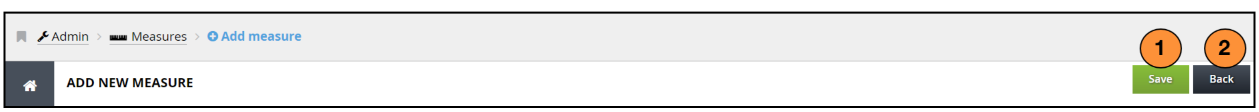


FIGURE 5-33: Save and Back Buttons

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.

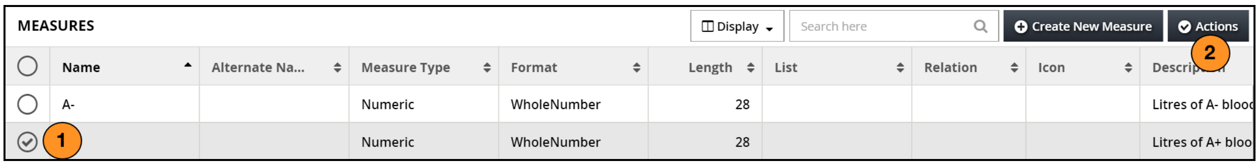


FIGURE 5-34: Actions Button

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

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

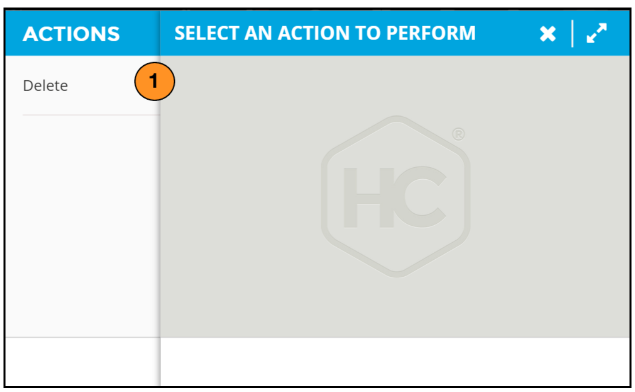


FIGURE 5-35: Measure - Other Actions

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.

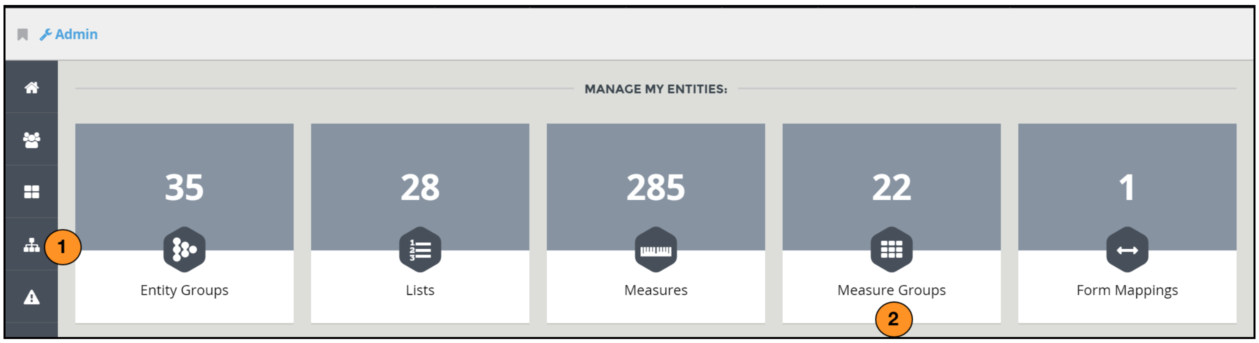


FIGURE 5-36: Measure Groups

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

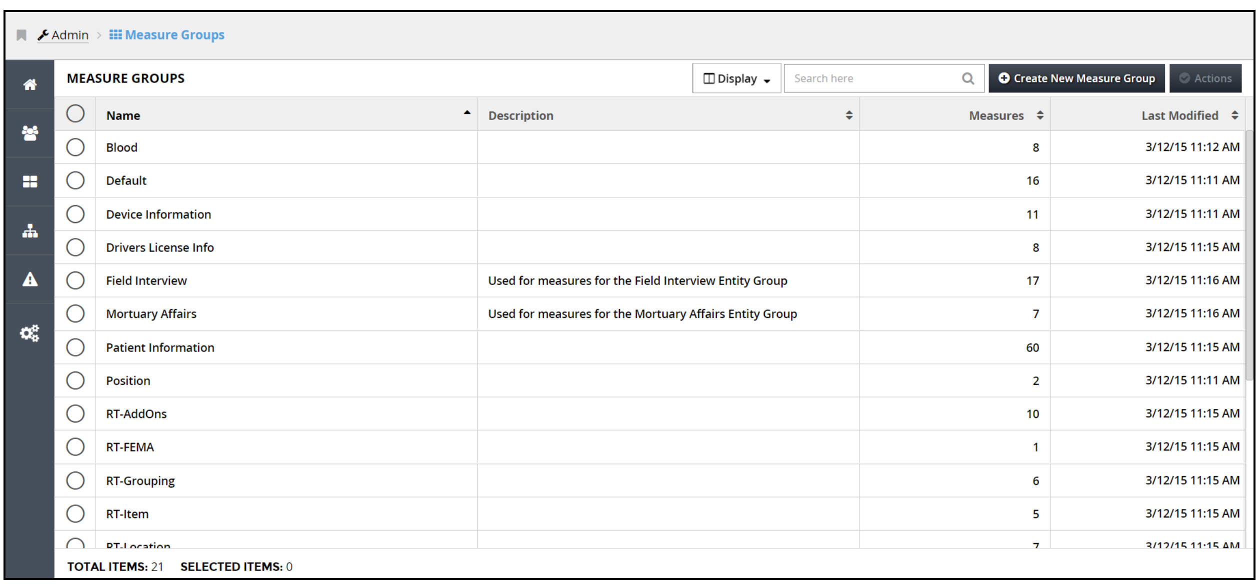


FIGURE 5-37: Measure Groups Listing

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.

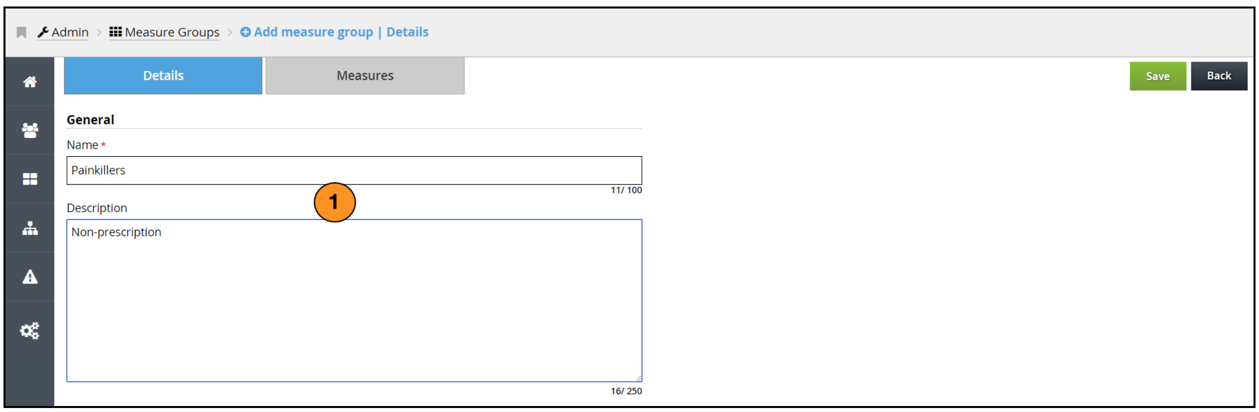


FIGURE 5-39: Creating Measure Group - Details

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.

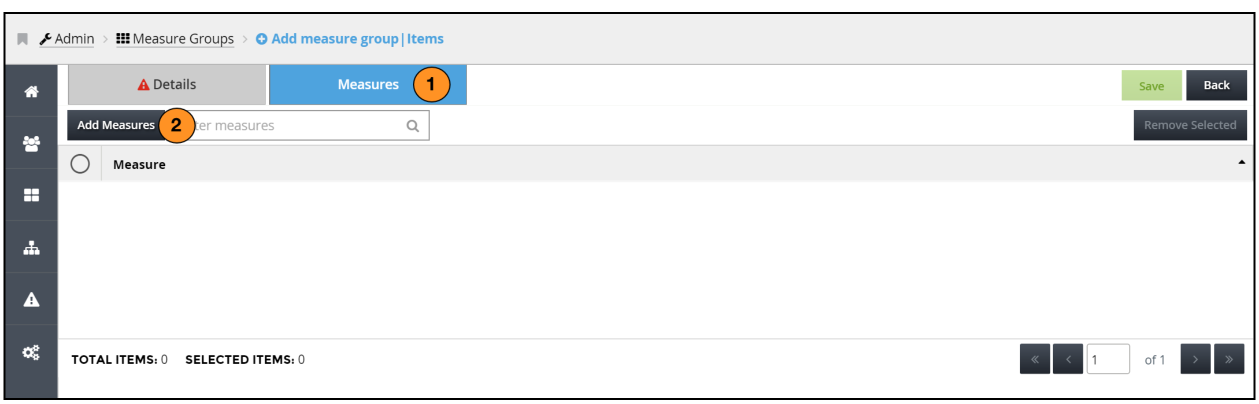


FIGURE 5-40: Creating Measure Group - Measures

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.

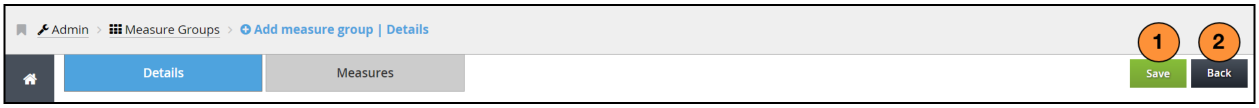


FIGURE 5-41: Save and Back Buttons

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.

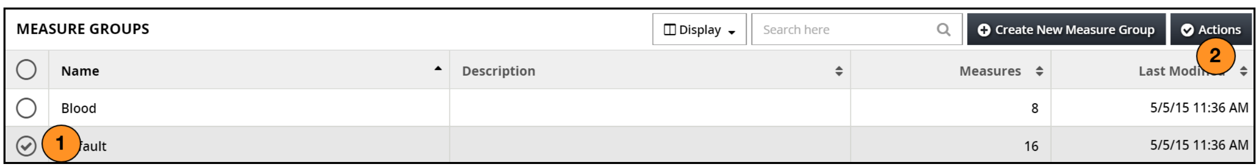


FIGURE 5-42: Actions Button

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

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

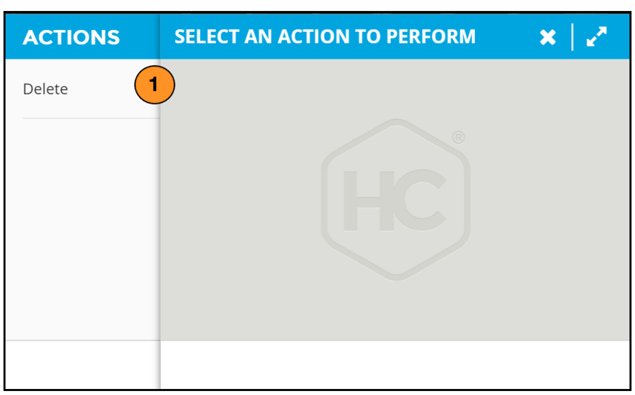


FIGURE 5-43: Measure Groups- Other Actions

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.

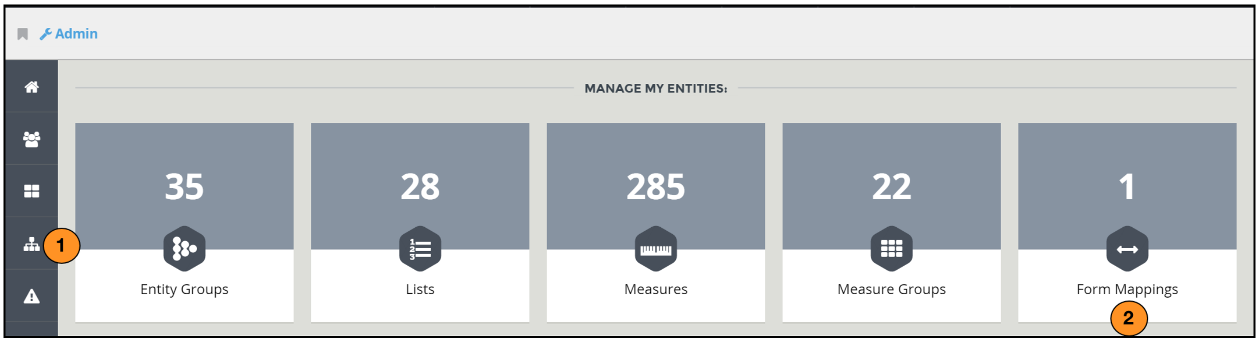


FIGURE 5-44: Form Mapping

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.

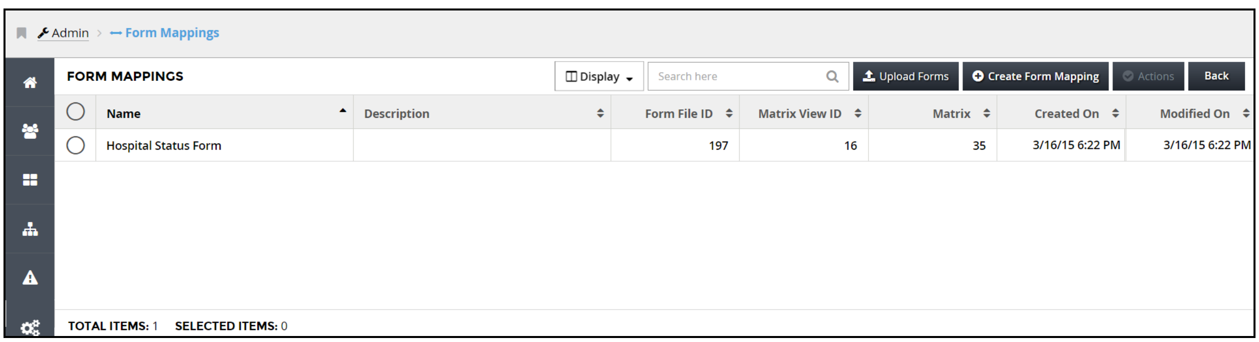


FIGURE 5-45: Form Mappings Listing

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.

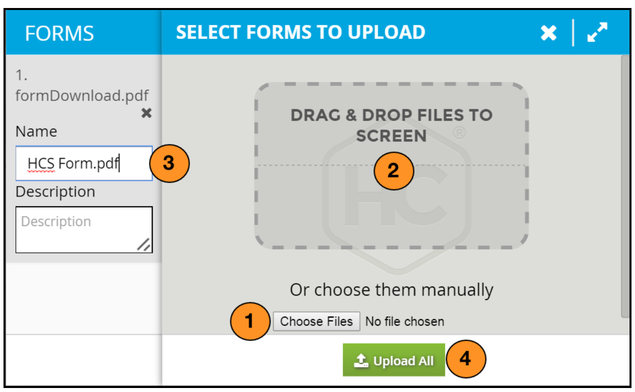


FIGURE 5-47: Upload Forms Naming

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**.

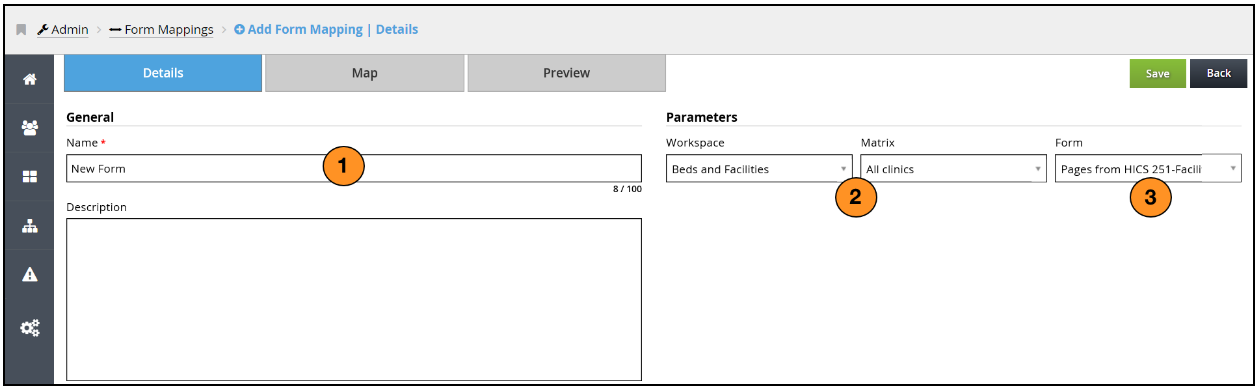


FIGURE 5-49: Form Mapping - Details tab

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.

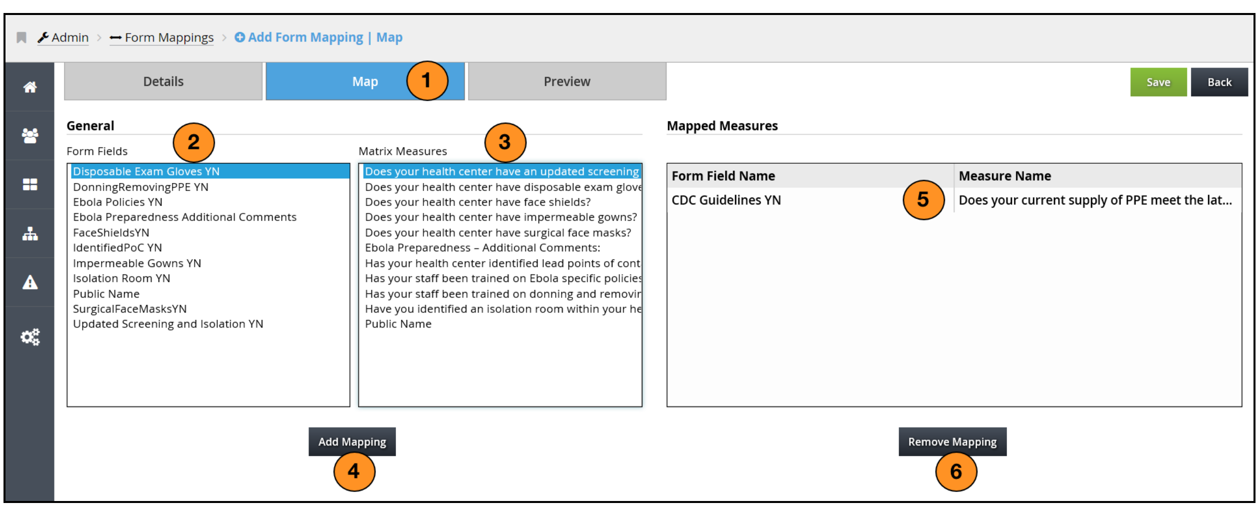


FIGURE 5-50: Form Mapping - Map tab

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.

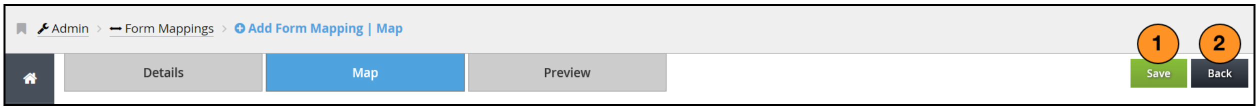


FIGURE 5-51: Save and Back Buttons

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.

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.

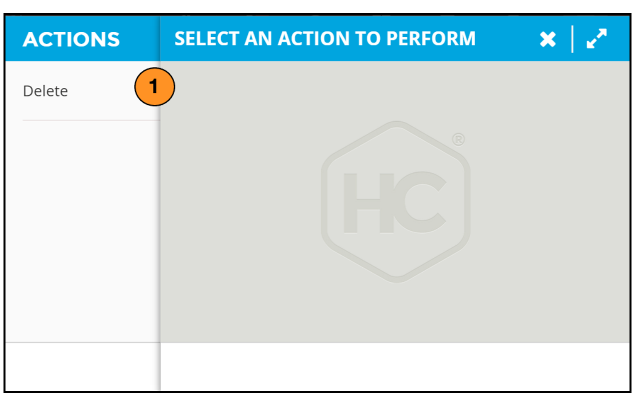


FIGURE 5-53: Form Mappings - Other Actions

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.

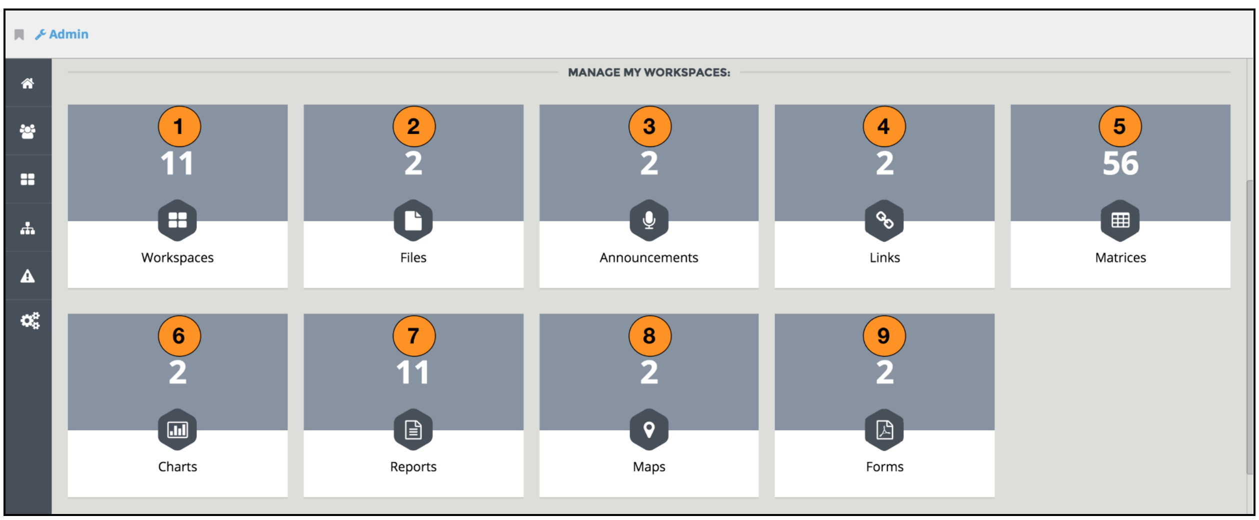


FIGURE 6-1: Workspace Items

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.

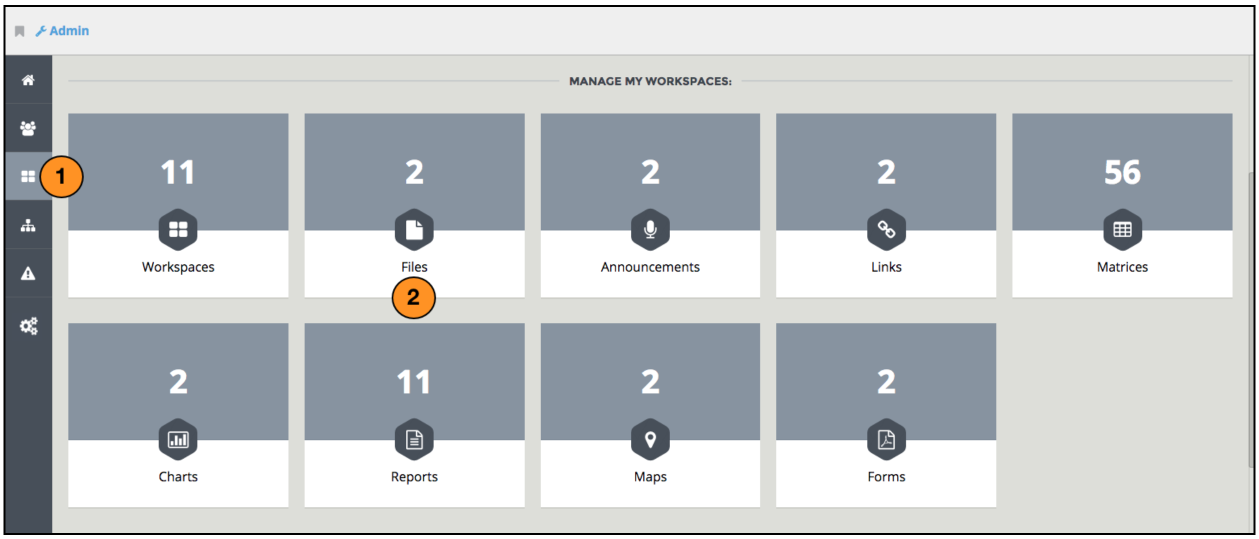


FIGURE 6-2: Files

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

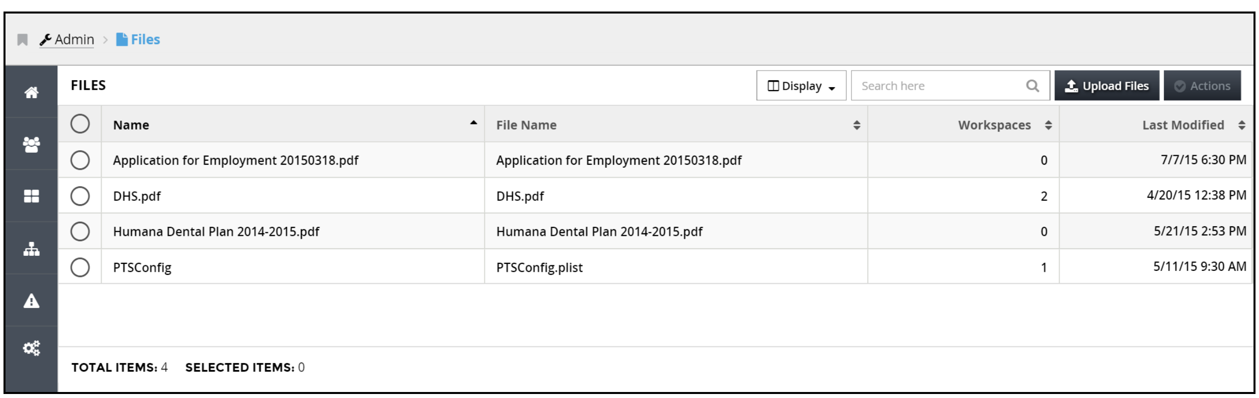


FIGURE 6-3: Files List

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.

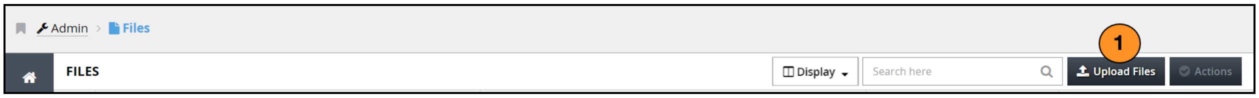


FIGURE 6-4: Upload Files Button

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.

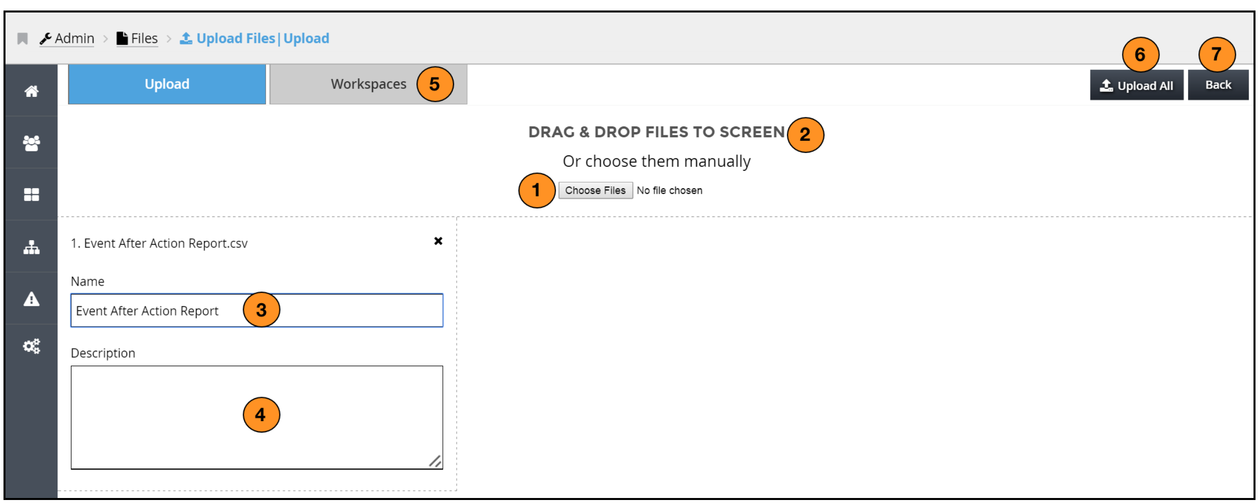


FIGURE 6-5: Upload a File

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.

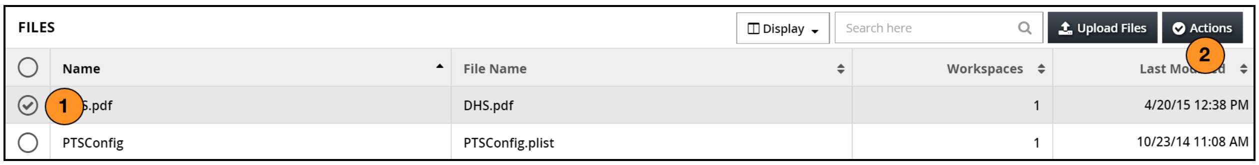


FIGURE 6-6: Actions Button

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

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

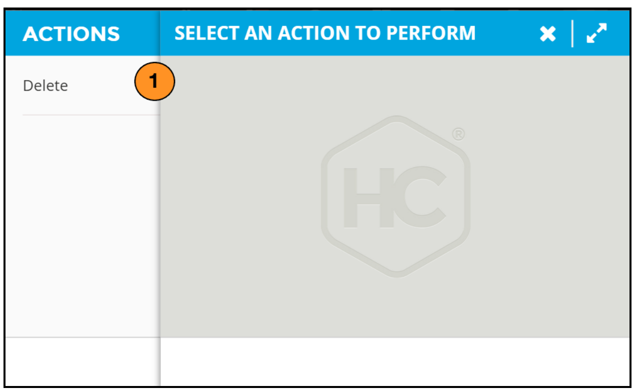


FIGURE 6-7: Files - Other Actions

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.

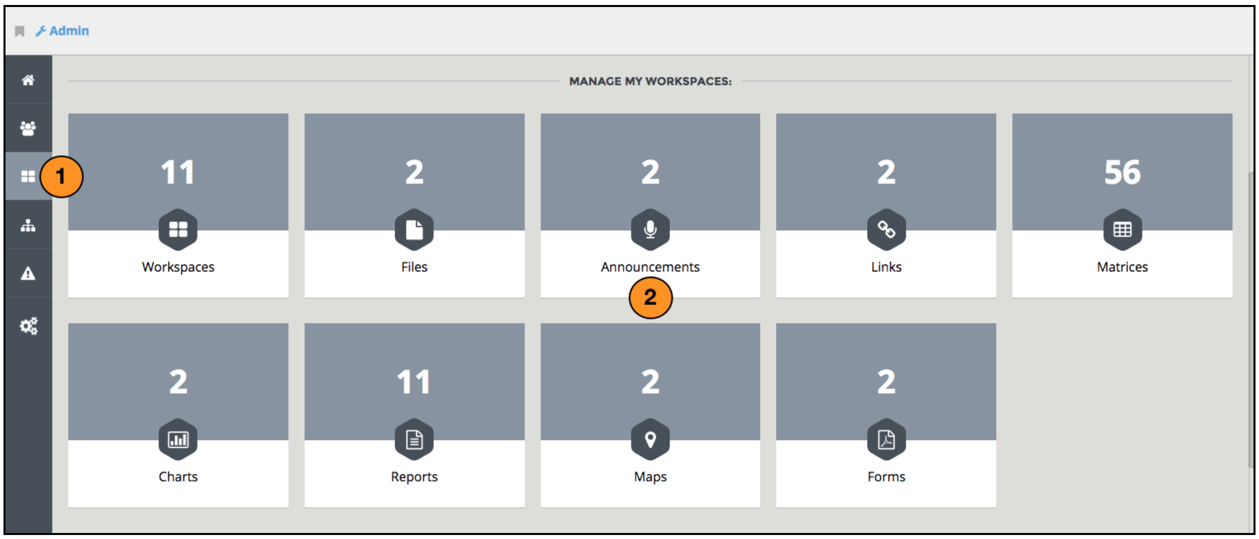


FIGURE 6-8: Announcements

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

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.

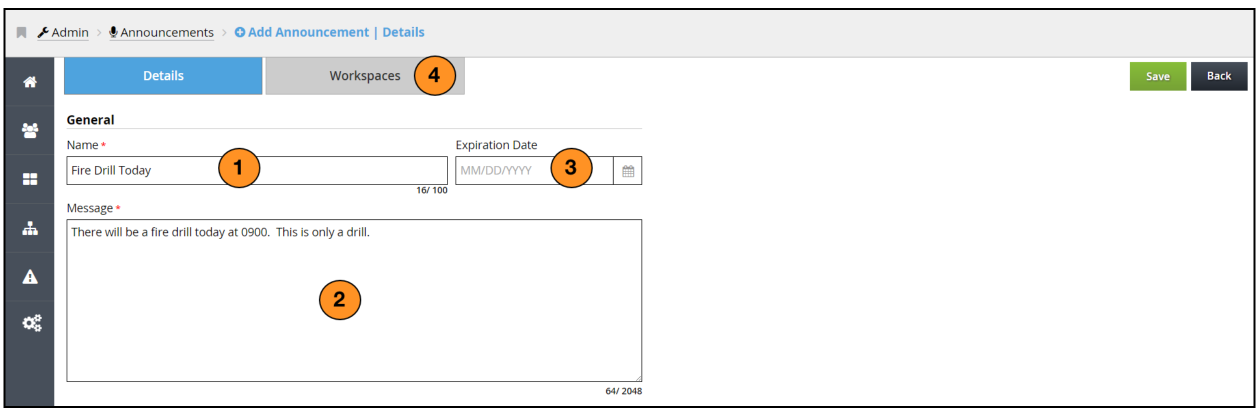


FIGURE 6-11: Add Announcement - Details

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 out-dated 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.

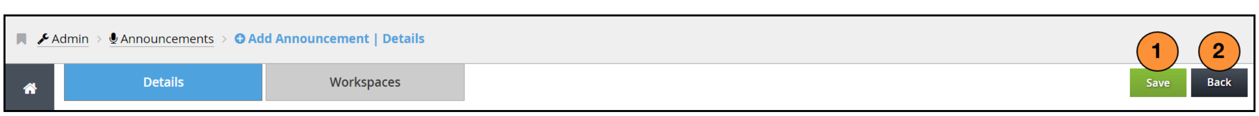


FIGURE 6-12: Save and Back buttons

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.

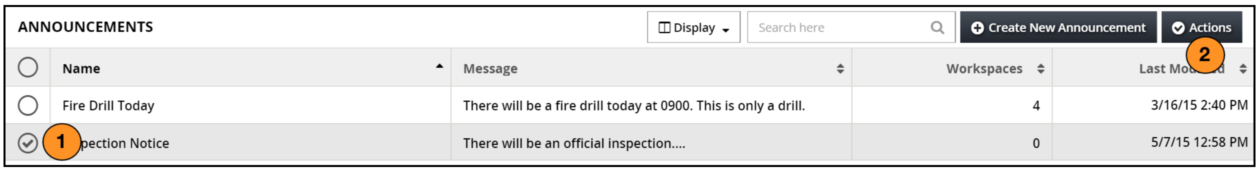


FIGURE 6-13: Actions Button

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

1. **Delete** permanently removes the announcement from the system.

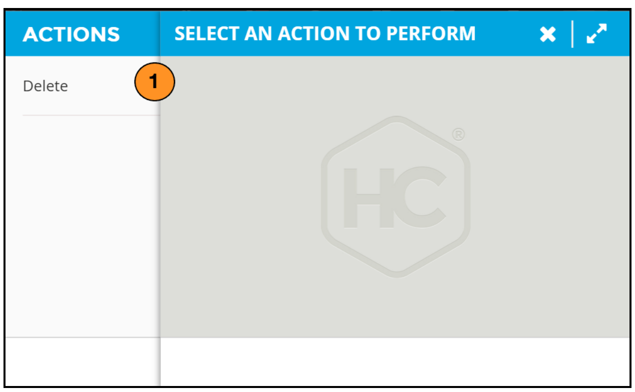


FIGURE 6-14: Announcements - Other Actions

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.

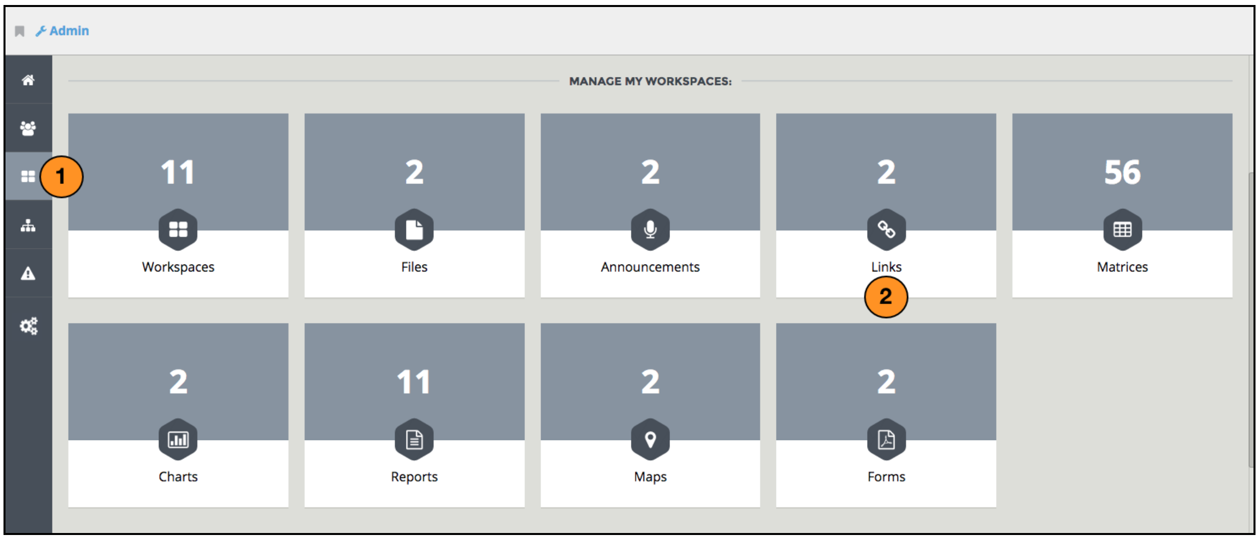


FIGURE 6-15: Links

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

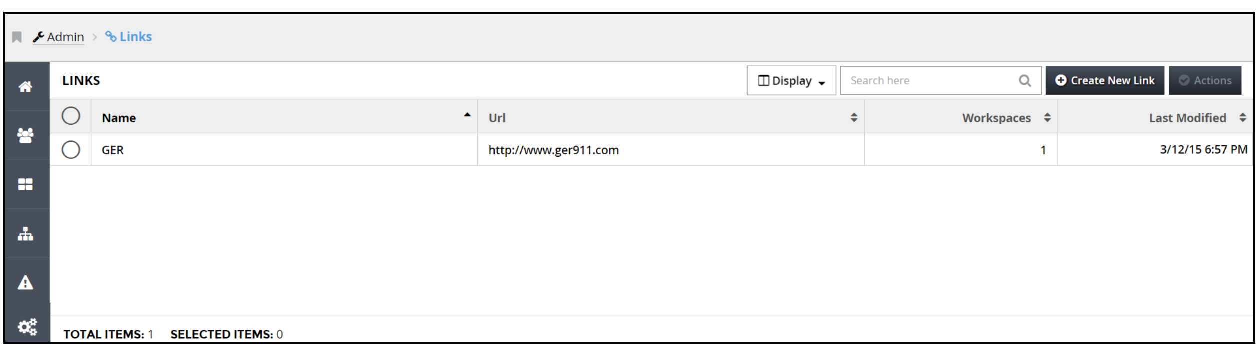


FIGURE 6-16: Links Listing

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.

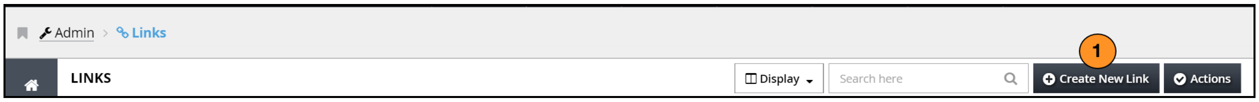


FIGURE 6-17: Create New Link Button

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:** Sentinal 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.

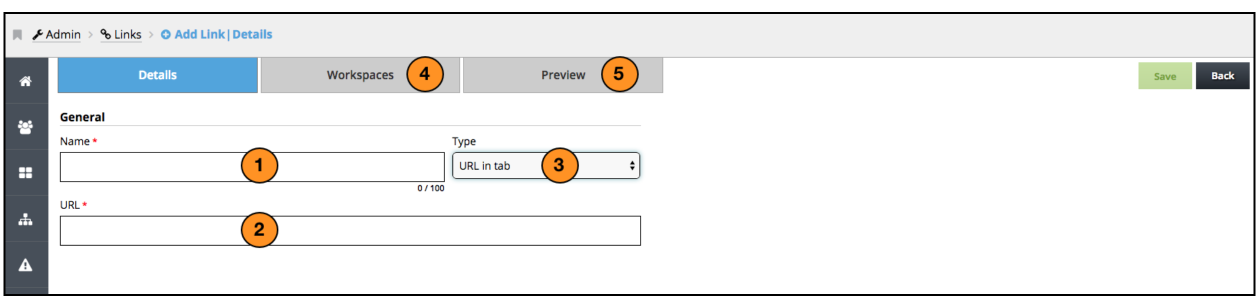


FIGURE 6-18: Adding a Link - Details

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.

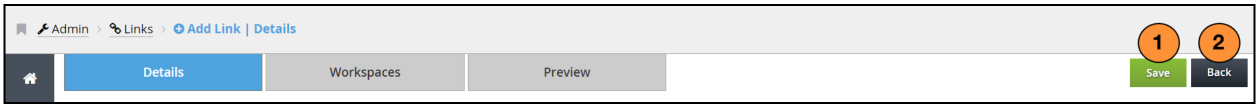


FIGURE 6-19: Save and Back buttons

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.

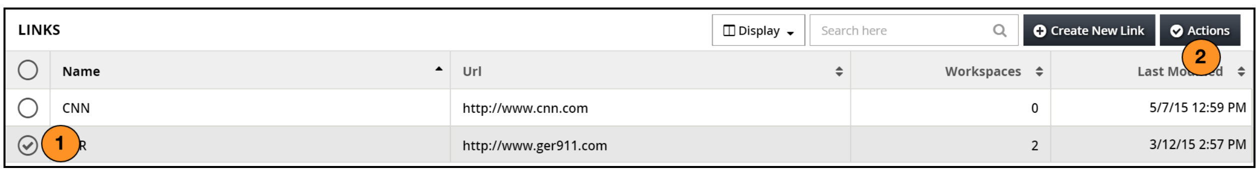


FIGURE 6-20: Actions Button

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

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

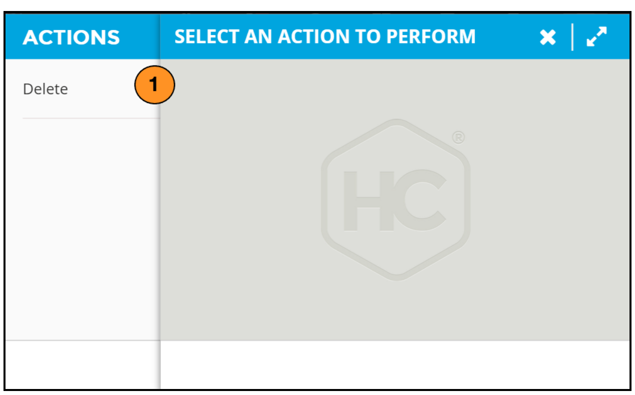


FIGURE 6-21: Links - Other Actions

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.

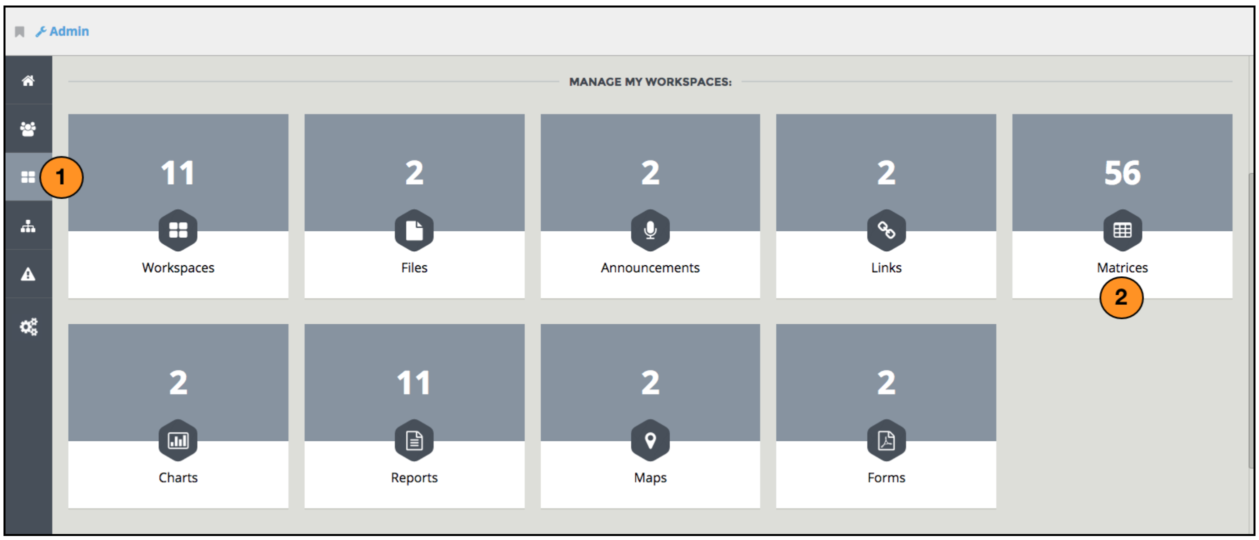


FIGURE 6-22: Matrices

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.

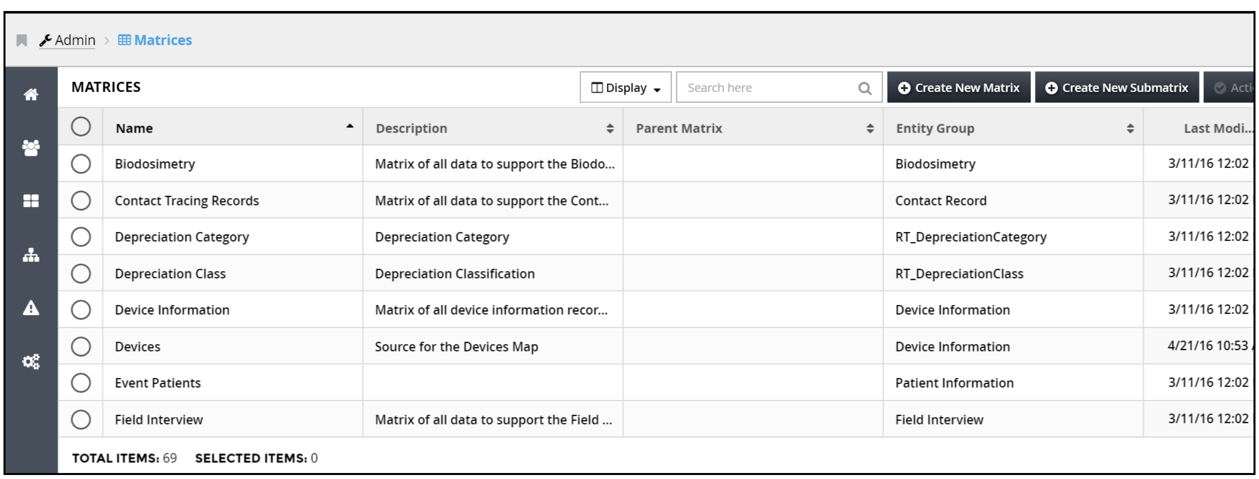


FIGURE 6-23: Matrices Listing

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.

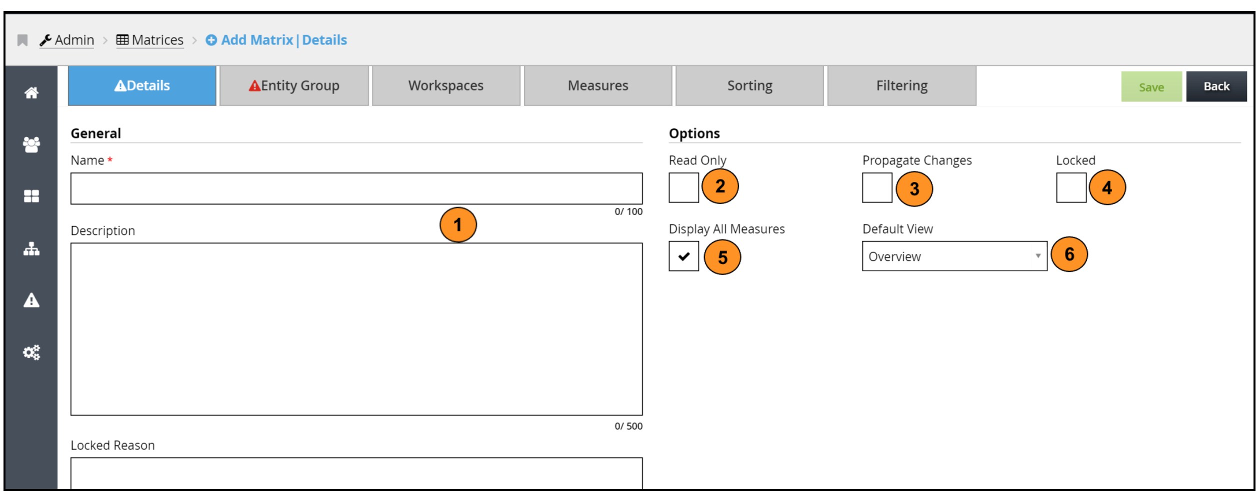


FIGURE 6-25: Add Matrix - Details

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.

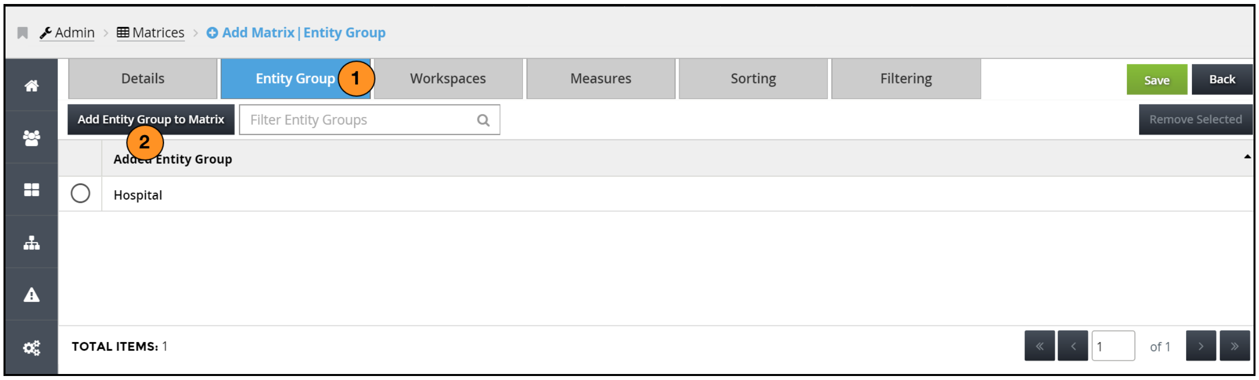


FIGURE 6-26: Add Matrix - Entity Group

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.

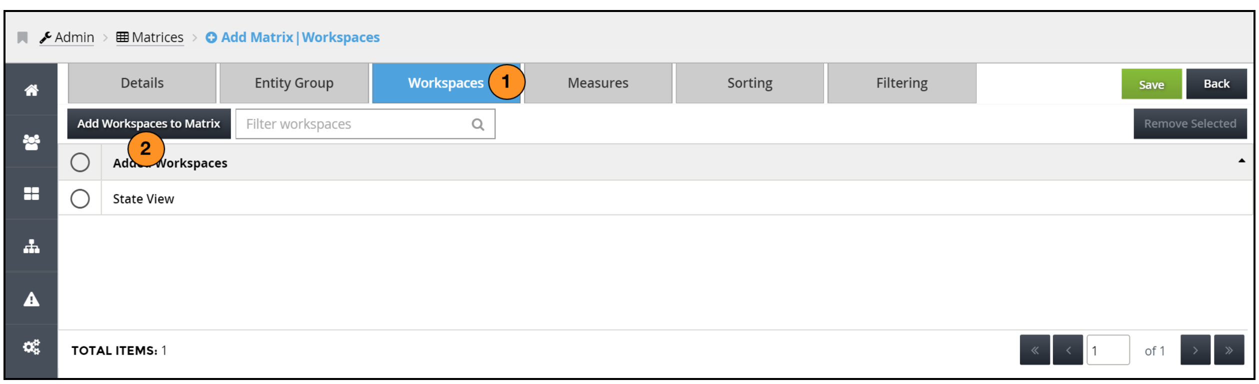


FIGURE 6-27: Add Matrix - Workspaces

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.

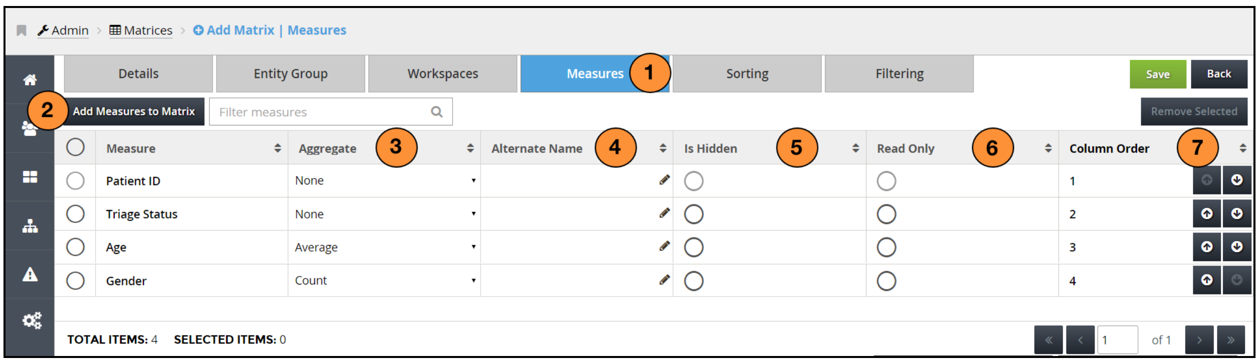


FIGURE 6-28: Add Matrix - Measures

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.

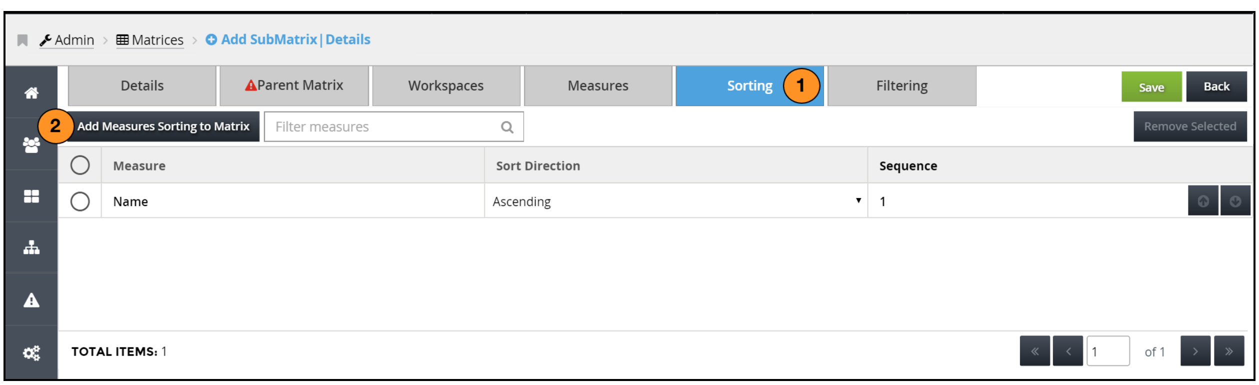


FIGURE 6-29: Add Matrix - Sorting

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.

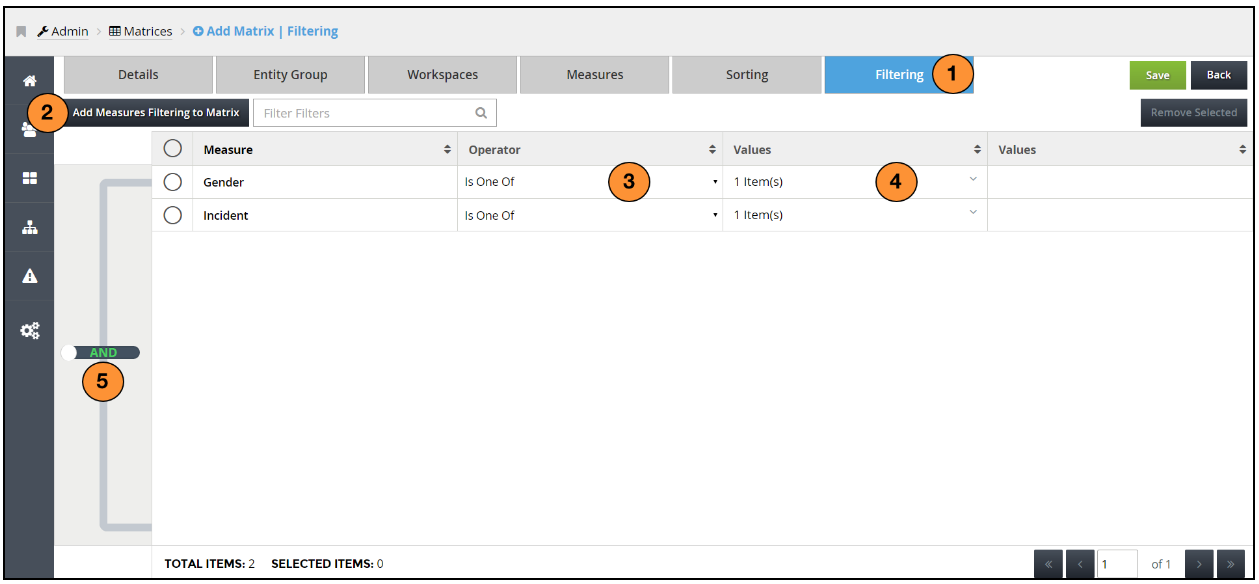


FIGURE 6-30: Adding a Matrix - Filtering

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.

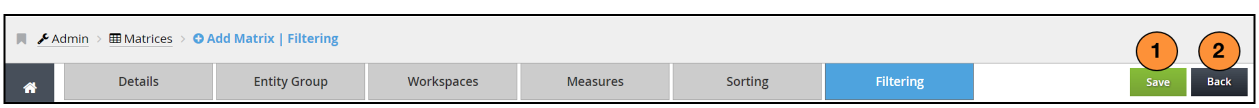


FIGURE 6-31: Save and Back buttons

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.

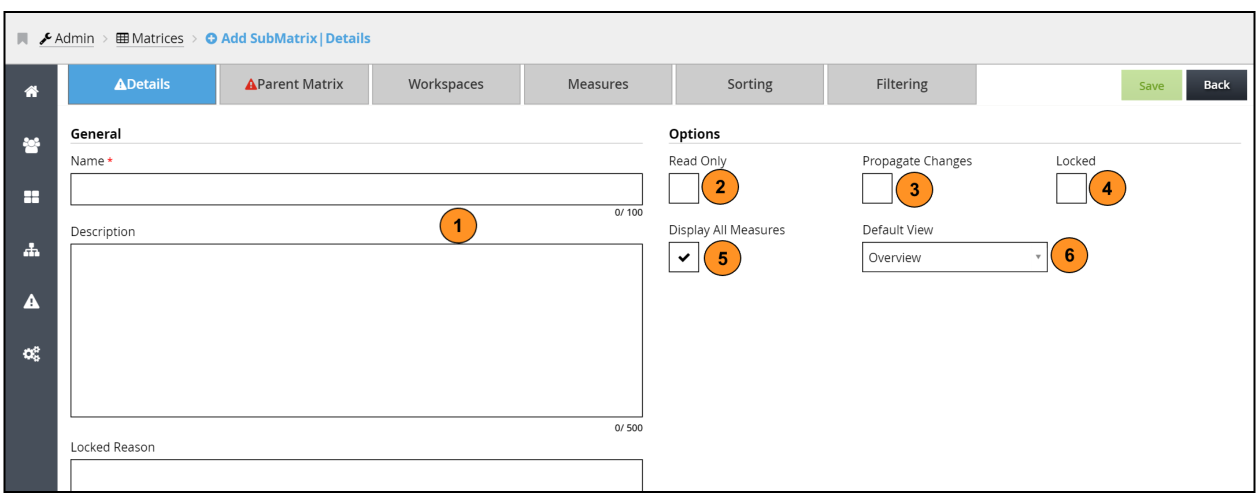


FIGURE 6-33: Add SubMatrix - Details

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.

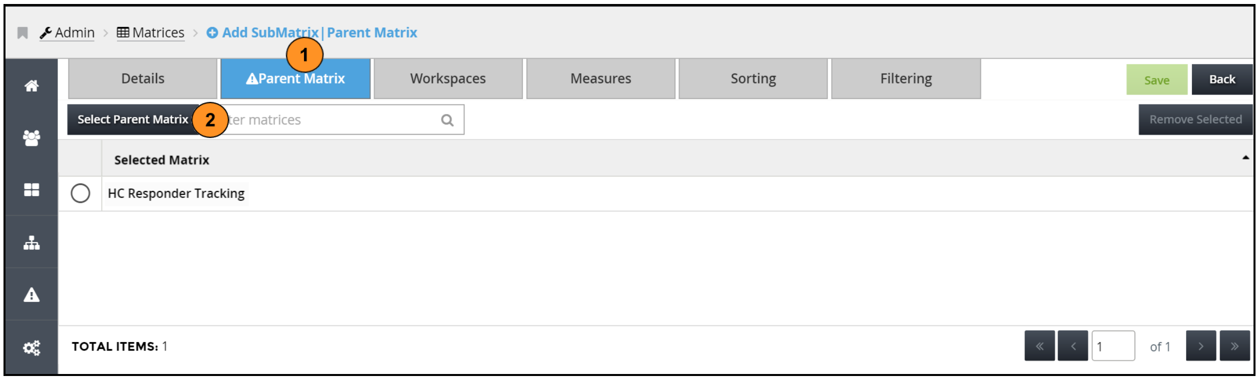


FIGURE 6-34: Add SubMatrix - Parent Matrix

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.

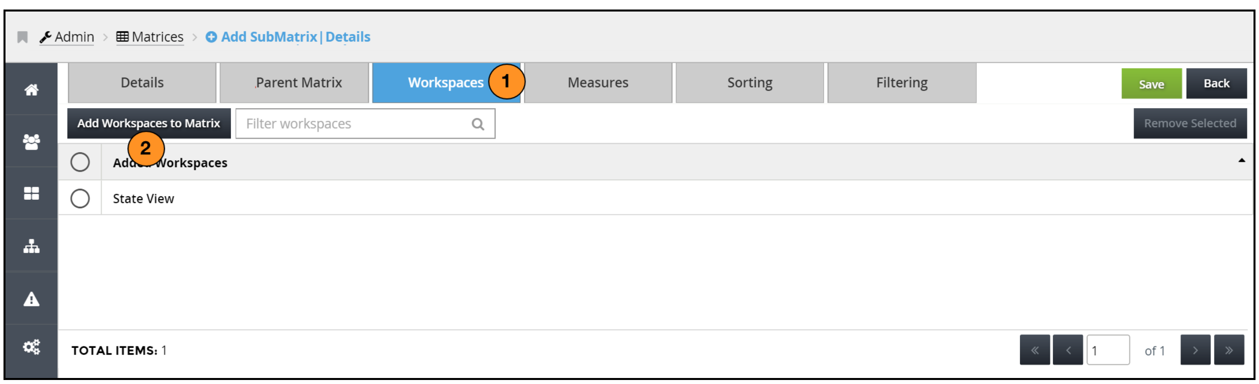


FIGURE 6-35: Add SubMatrix - Workspaces

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.

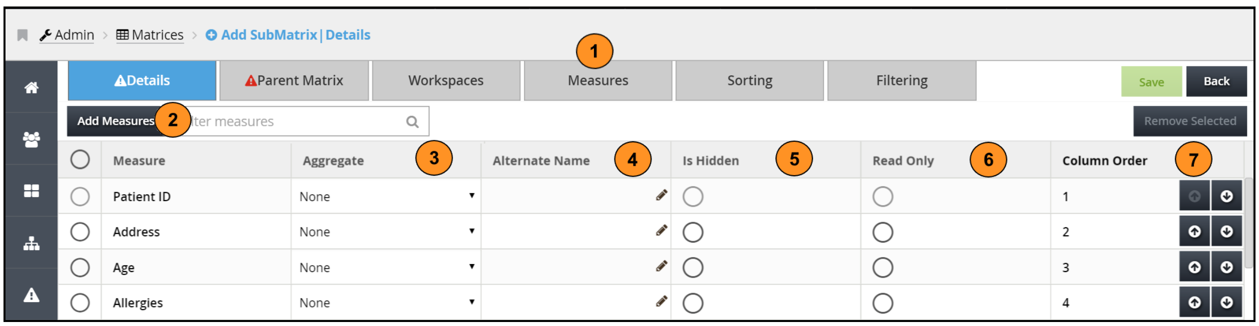


FIGURE 6-36: Add SubMatrix - Measures

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.

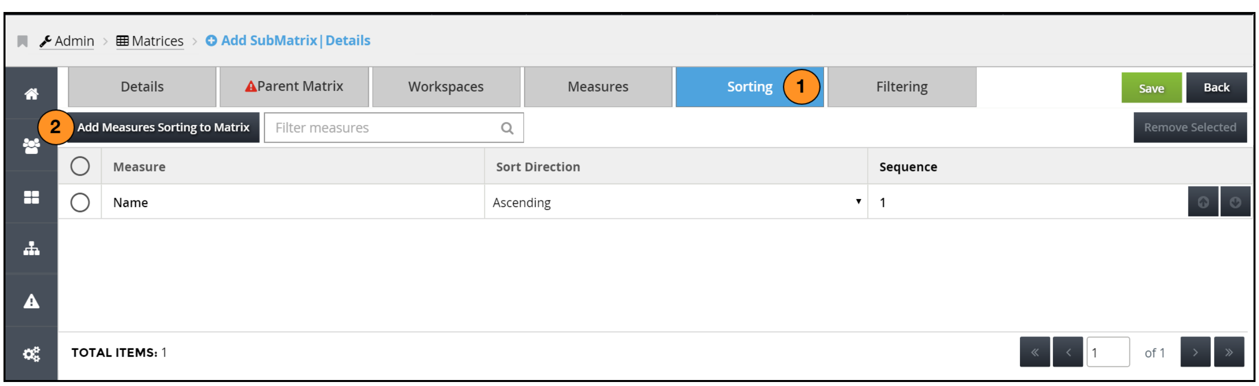


FIGURE 6-37: Add SubMatrix - Sorting

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.

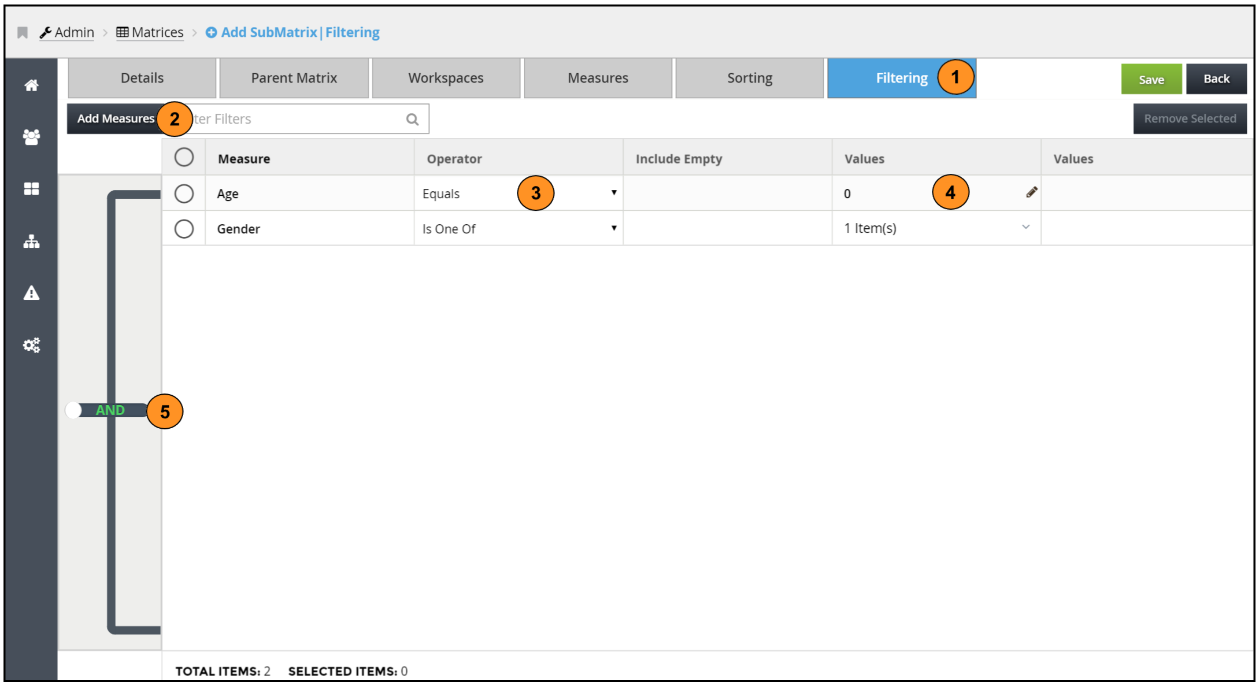


FIGURE 6-38: Adding a SubMatrix - Filtering

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.

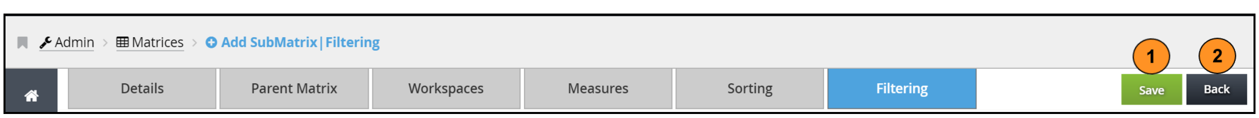


FIGURE 6-39: Save and Back Buttons

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.

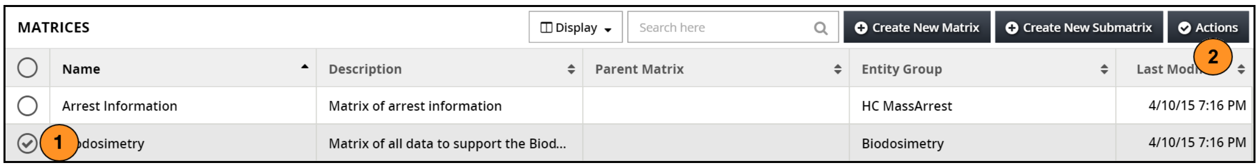


FIGURE 6-40: Actions Button

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.

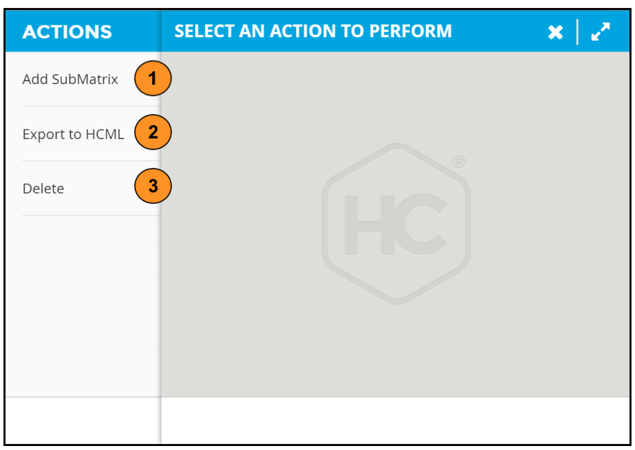


FIGURE 6-41: Matrices - Other Actions

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.

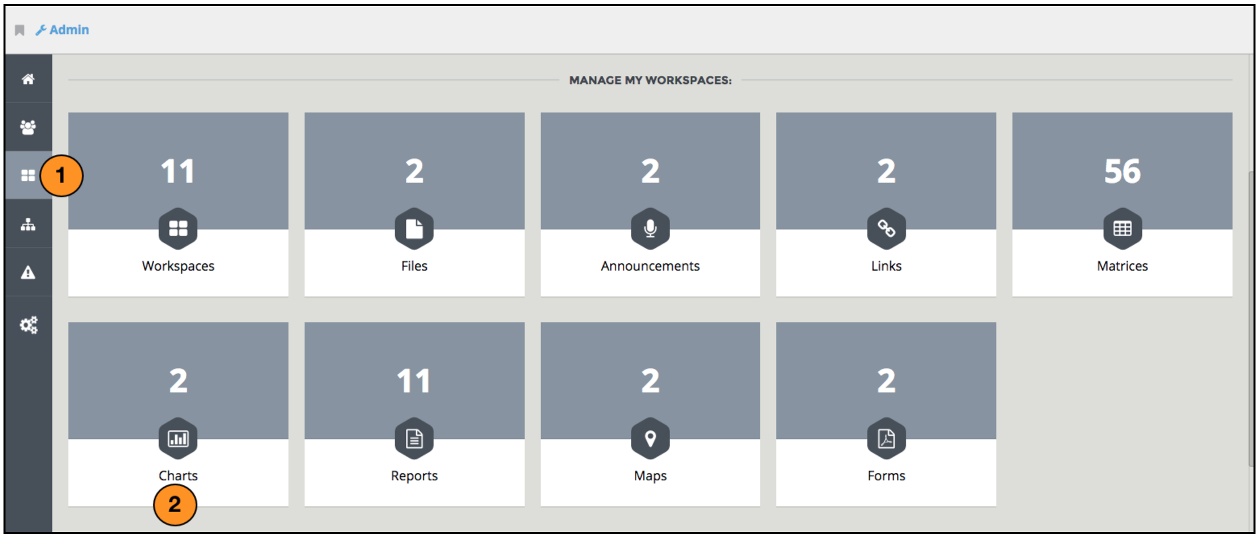


FIGURE 6-42: Charts

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.

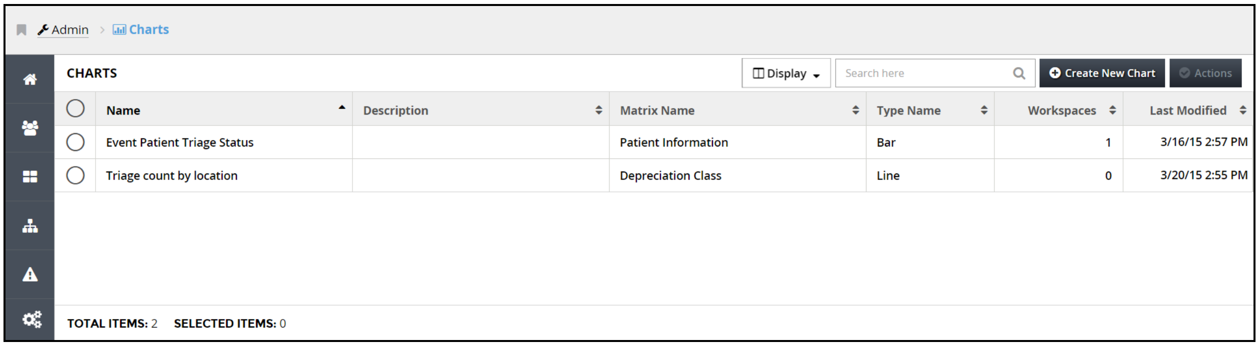


FIGURE 6-43: Charts Listing

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).

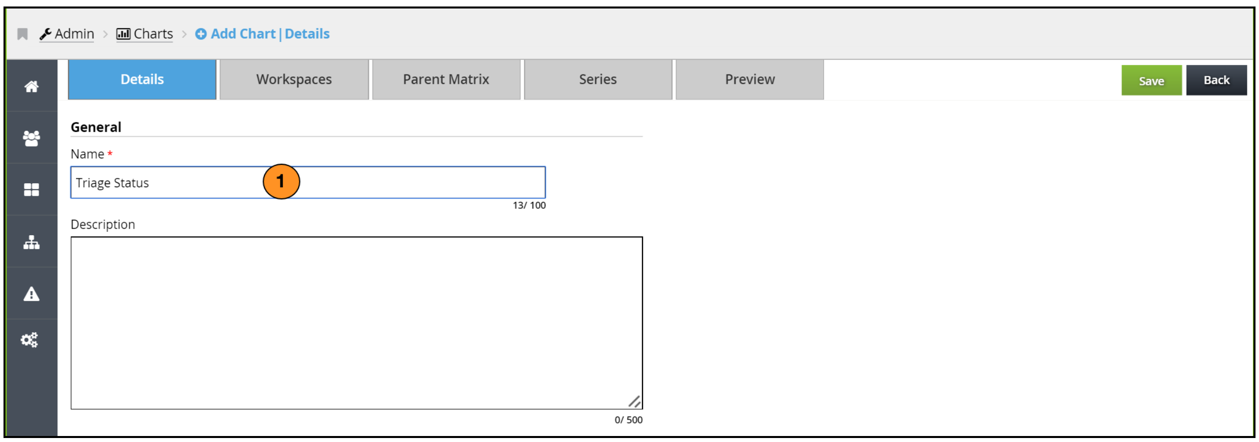


FIGURE 6-45: Add Chart - Details

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.

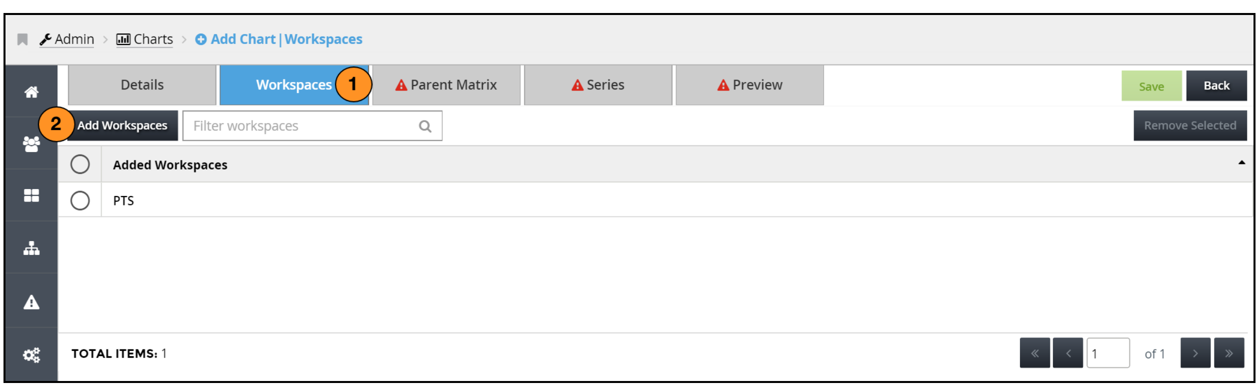


FIGURE 6-46: Charts - Workspaces

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.

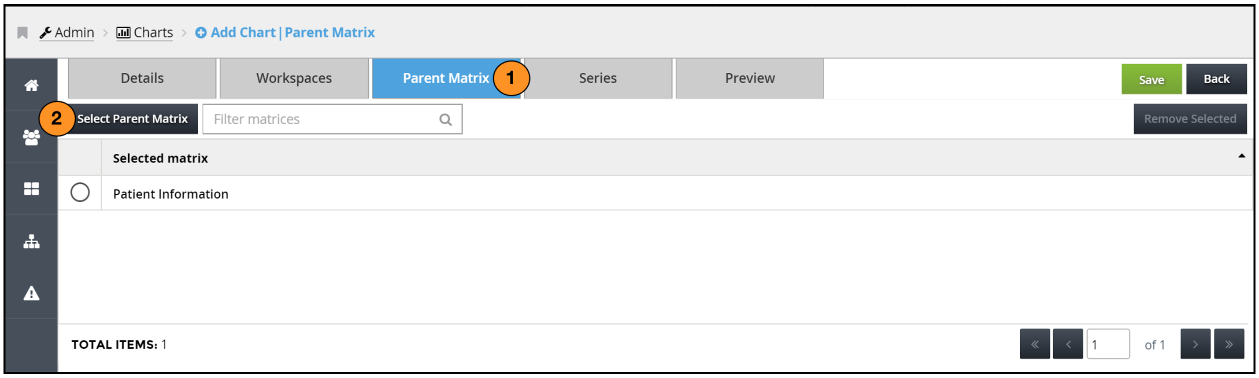


FIGURE 6-47: Charts - Parent Matrix

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.

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.

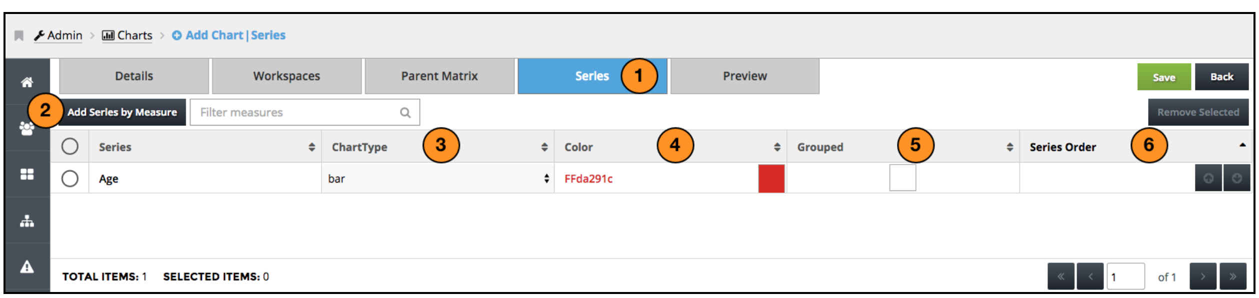


FIGURE 6-48: Creating a Chart - Series

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.

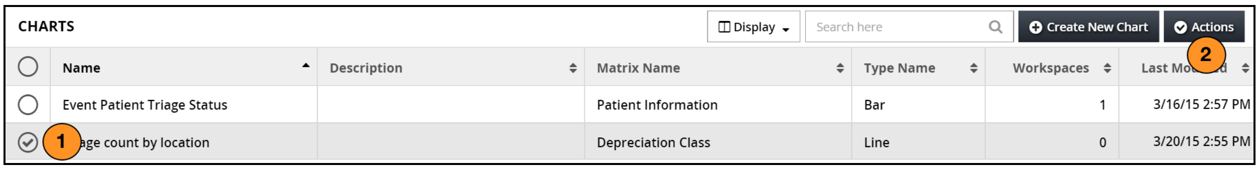


FIGURE 6-51: Actions Button

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

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

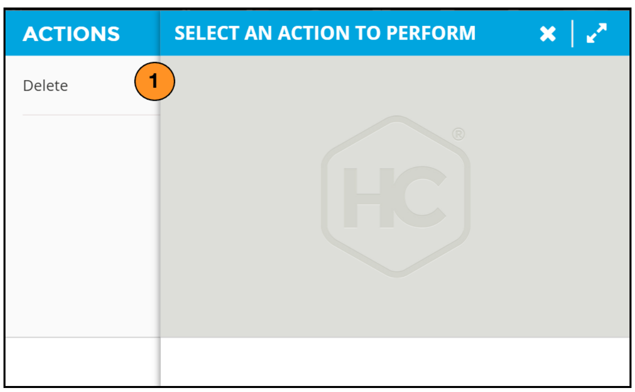


FIGURE 6-52: Charts - Other Actions

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.

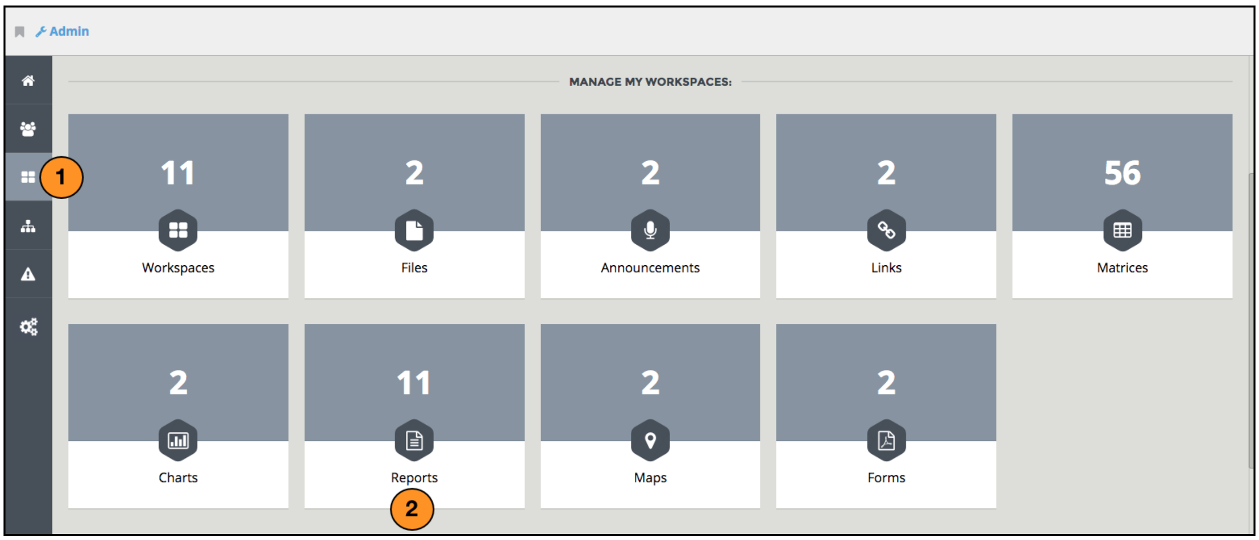


FIGURE 6-53: Reports

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
Hospitals A+	Report showing the hospitals A+ chart	0	10/22/13 11:38 AM
Hospitals Blood	Report of all hospitals blood supply	2	10/22/13 11:38 AM
Incident Summary NEW	New version of the Incident Summary Report	3	11/10/14 4:42 PM
Incident Summary Report	Incident Summary Report	6	2/21/14 2:17 PM
Measure Modification NEW	New version of the Measure Modification Report	2	11/14/14 3:19 PM
Measure Modification Report	Measure Modification Report	1	10/22/13 11:43 AM
Multi-Casualty Branch Manager NEW	New version of the Multi-Casualty Branch Manager Report	3	11/10/14 4:42 PM
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.

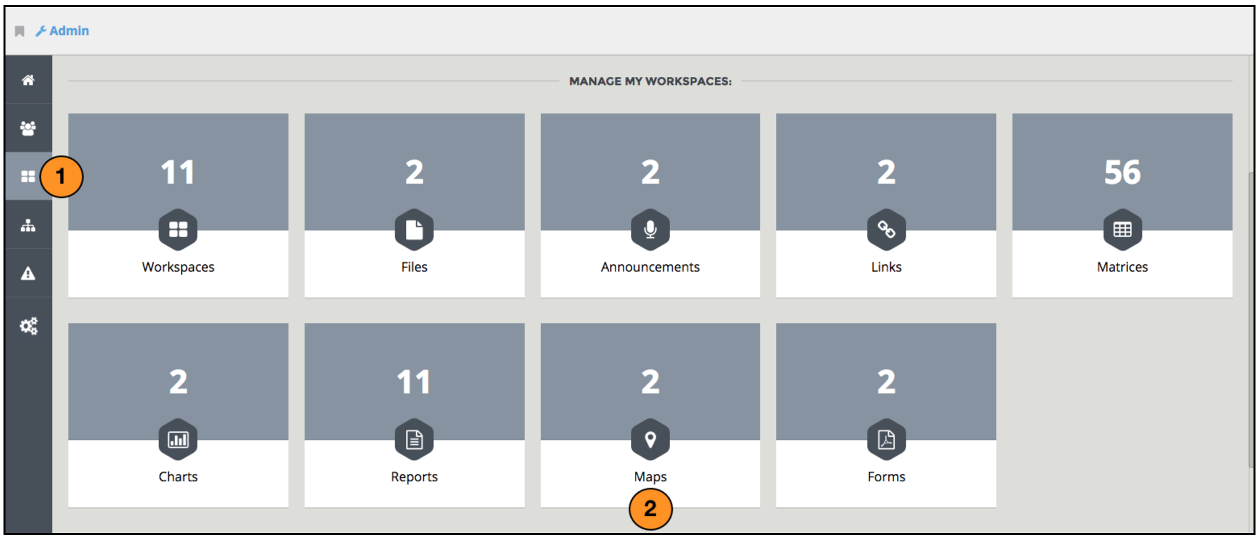


FIGURE 6-55: Maps

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

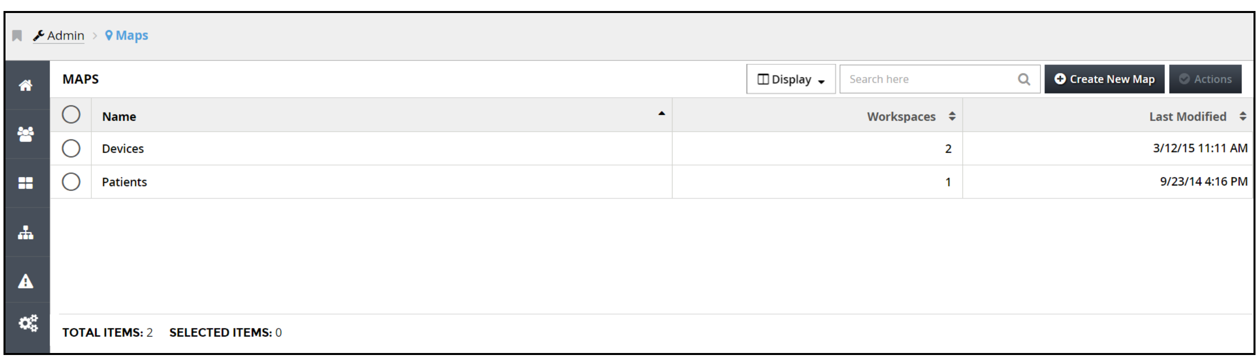


FIGURE 6-56: Maps Listing

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.

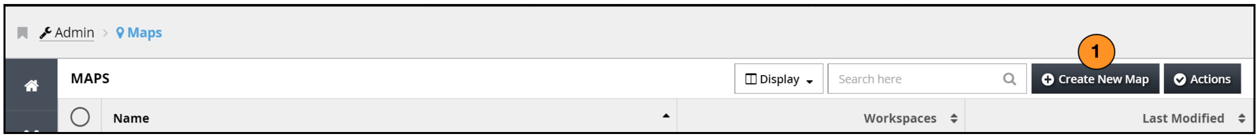


FIGURE 6-57: Create a New Map Button

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.

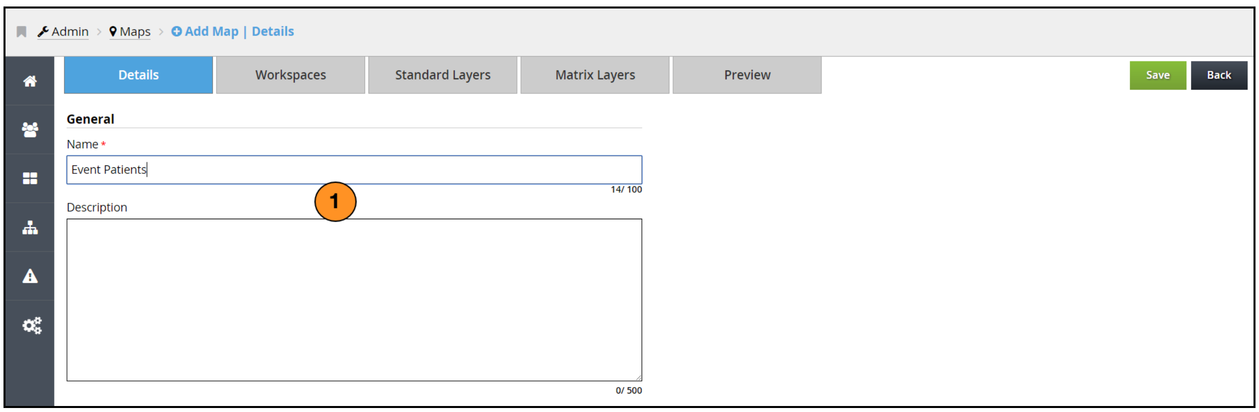


FIGURE 6-58: Add Map - Details

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.

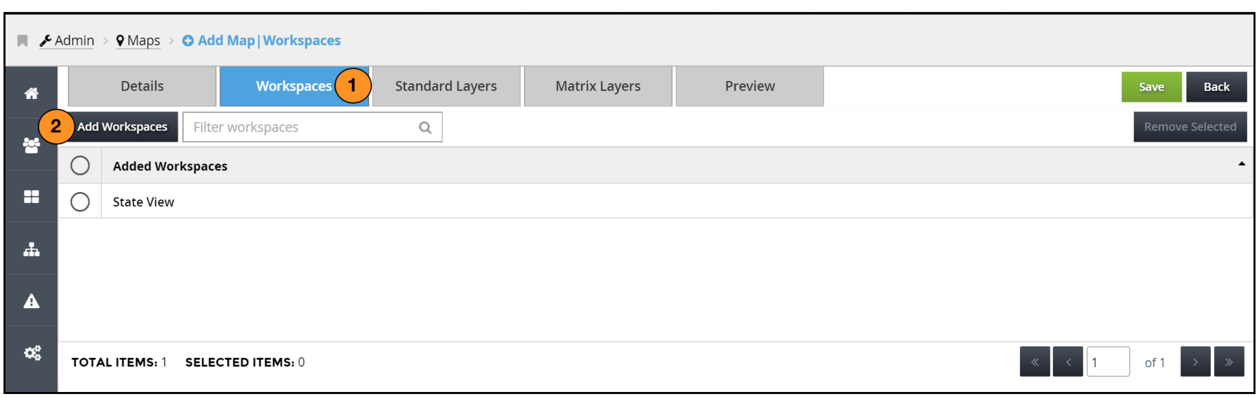


FIGURE 6-59: Add Map - Workspaces

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.

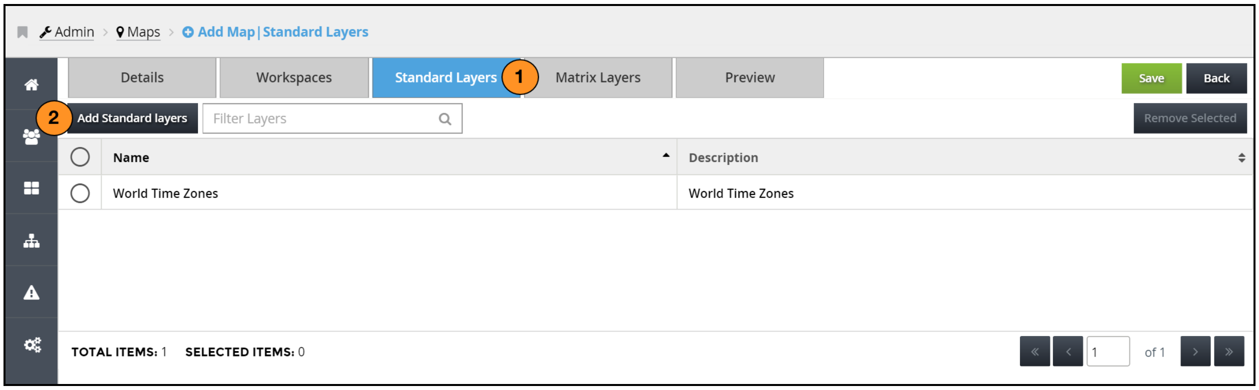


FIGURE 6-60: Adding a Map - Standard Layers

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*).

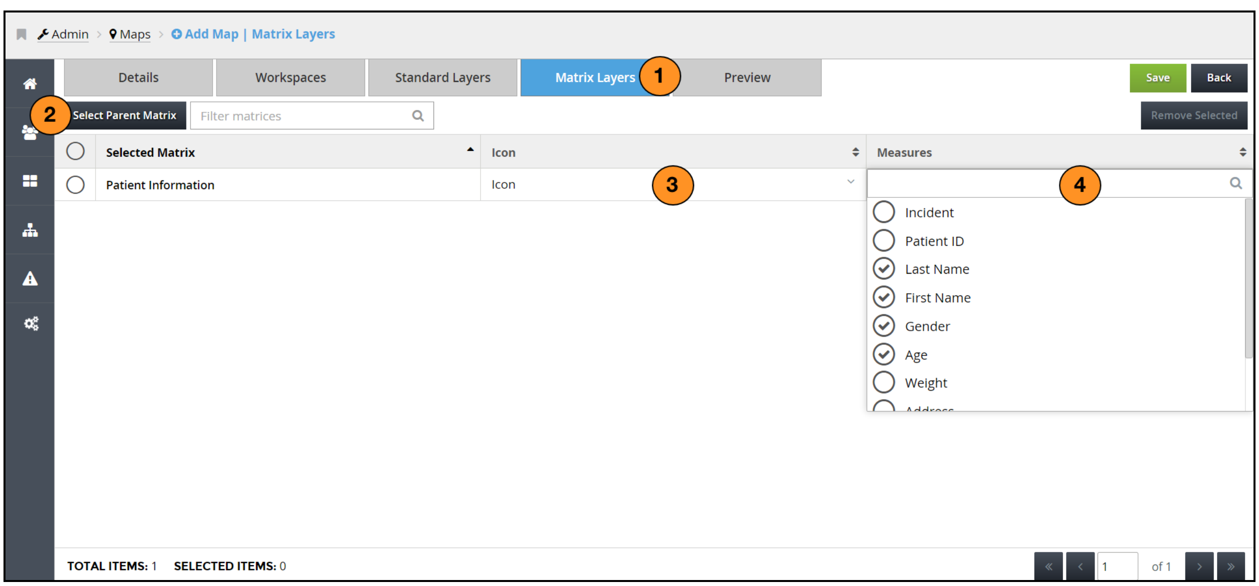


FIGURE 6-61: Add a Map - Matrix Layers

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

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

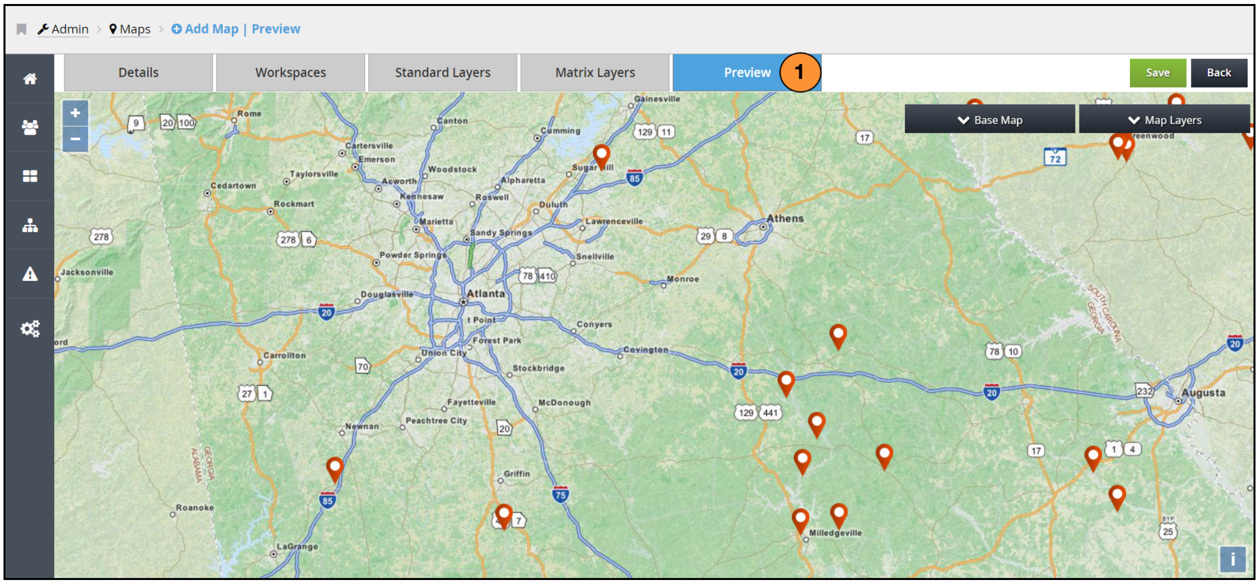


FIGURE 6-62: Create a New Map - Preview

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.

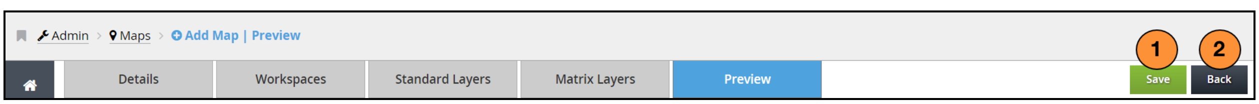


FIGURE 6-63: Save and Back buttons

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.

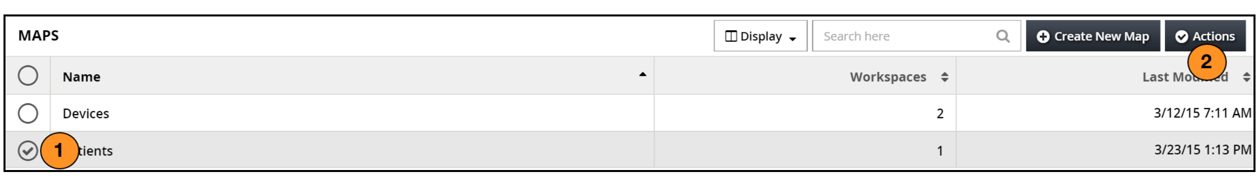


FIGURE 6-64: Actions Button

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

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

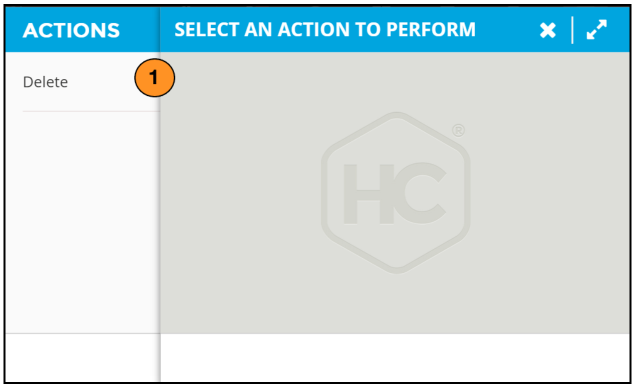


FIGURE 6-65: Maps - Other Actions

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.

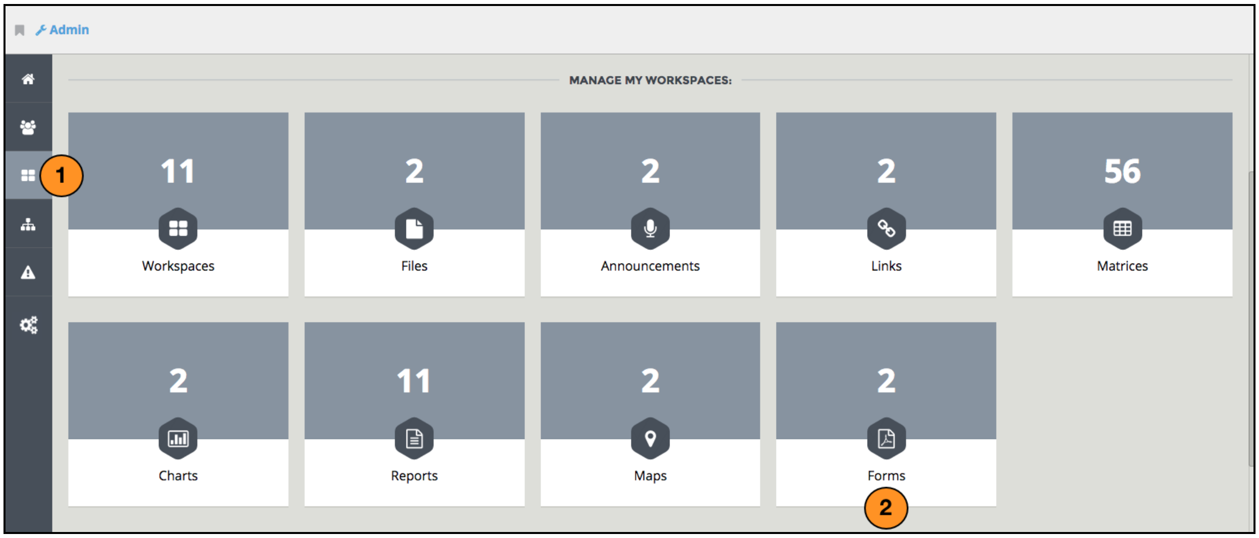


FIGURE 6-66: Forms

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

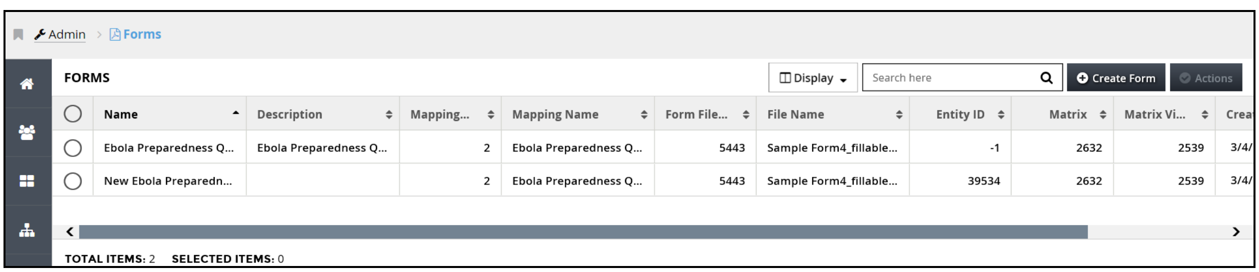


FIGURE 6-67: Forms Listing

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.

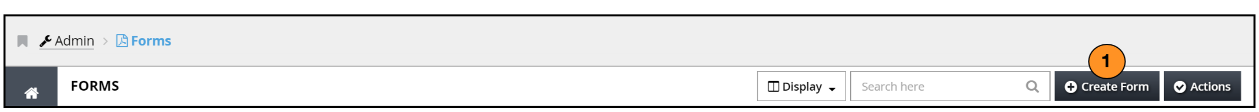


FIGURE 6-68: Create a New Form Button

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.

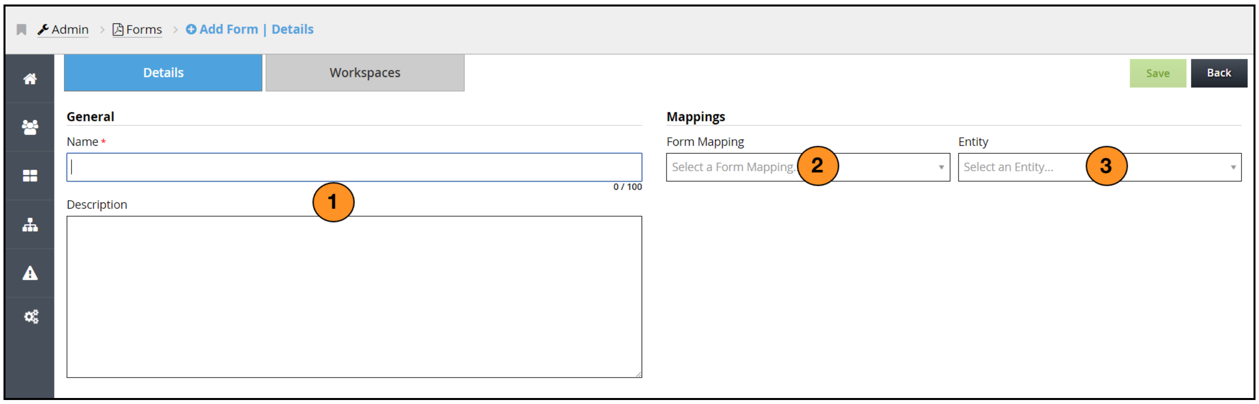


FIGURE 6-69: Add Form - Details

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.

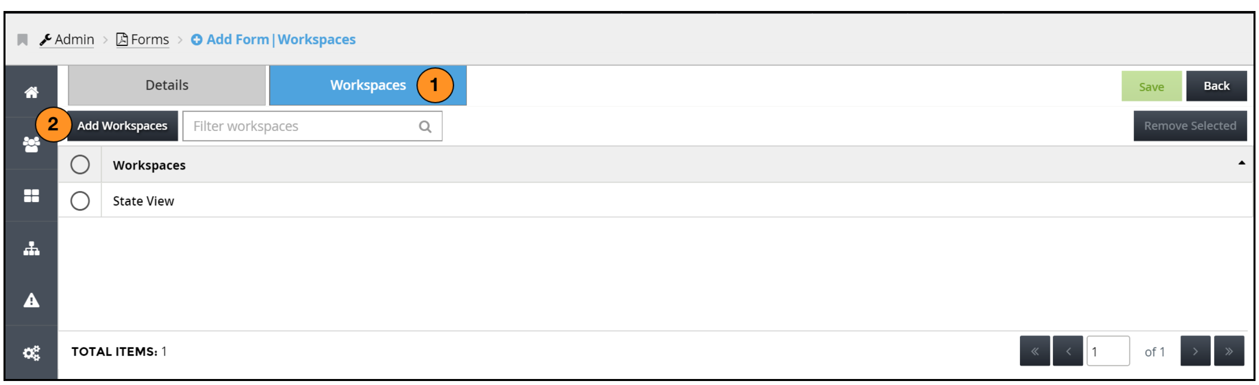


FIGURE 6-70: Add Form - Workspaces

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.

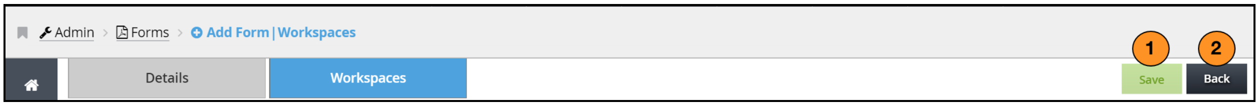


FIGURE 6-71: Save and Back buttons

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.

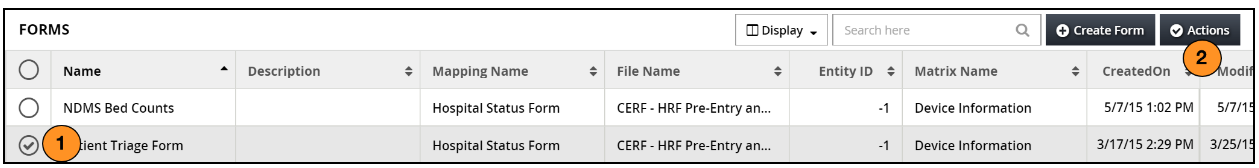


FIGURE 6-72: Actions Button

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.

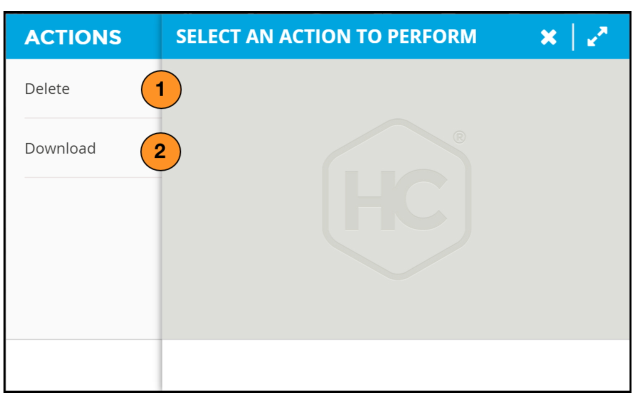


FIGURE 6-73: Forms - Other Actions

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.

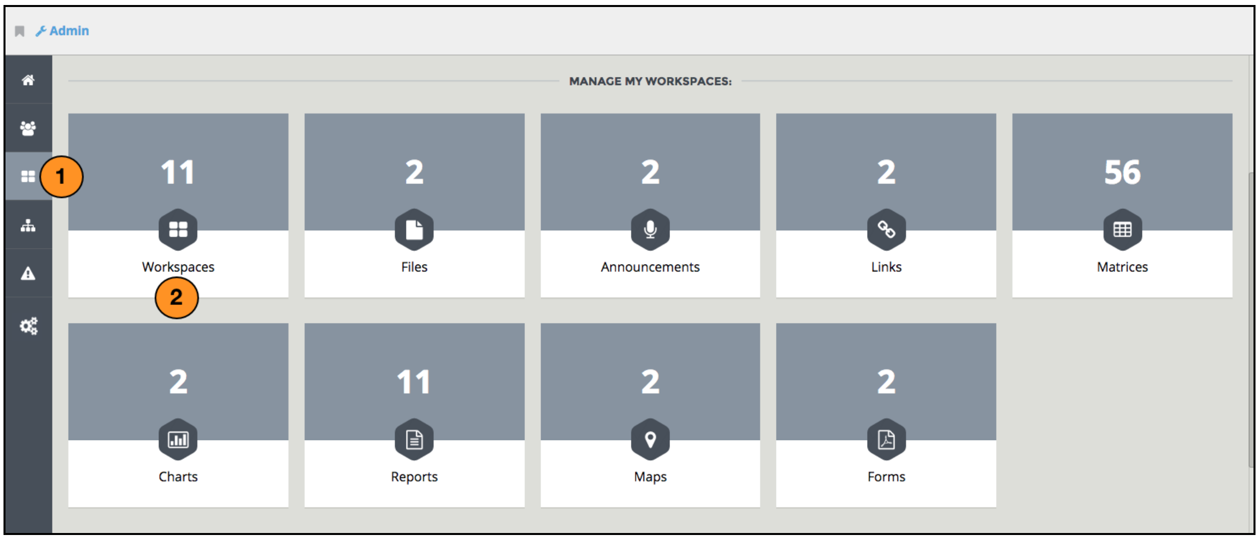


FIGURE 6-74: Workspaces

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

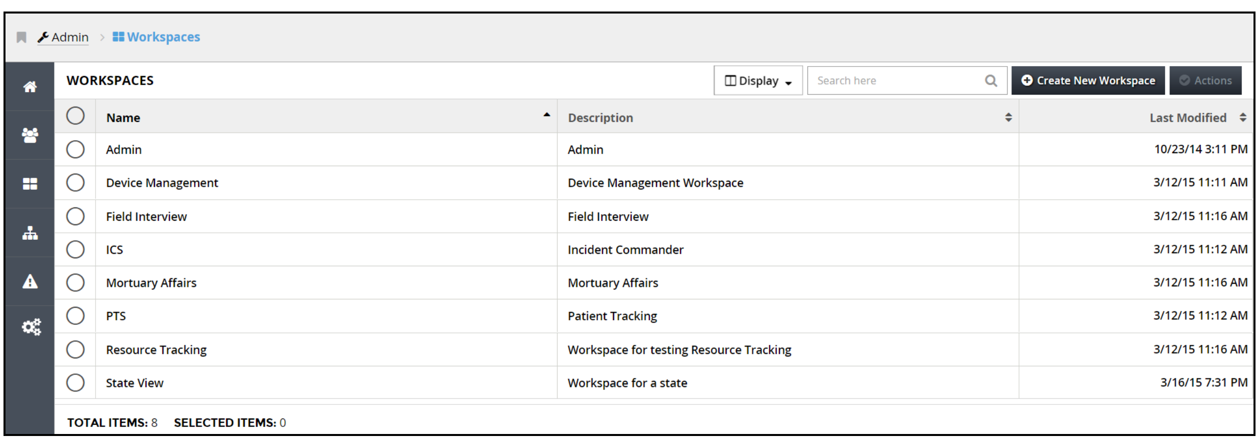


FIGURE 6-75: Workspaces List

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.

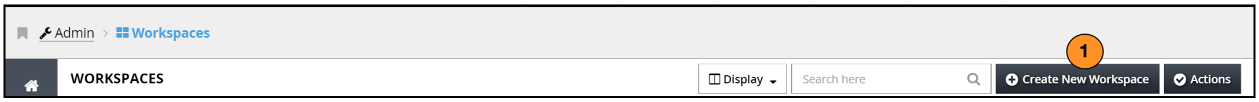


FIGURE 6-76: Create Workspaces Button

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.

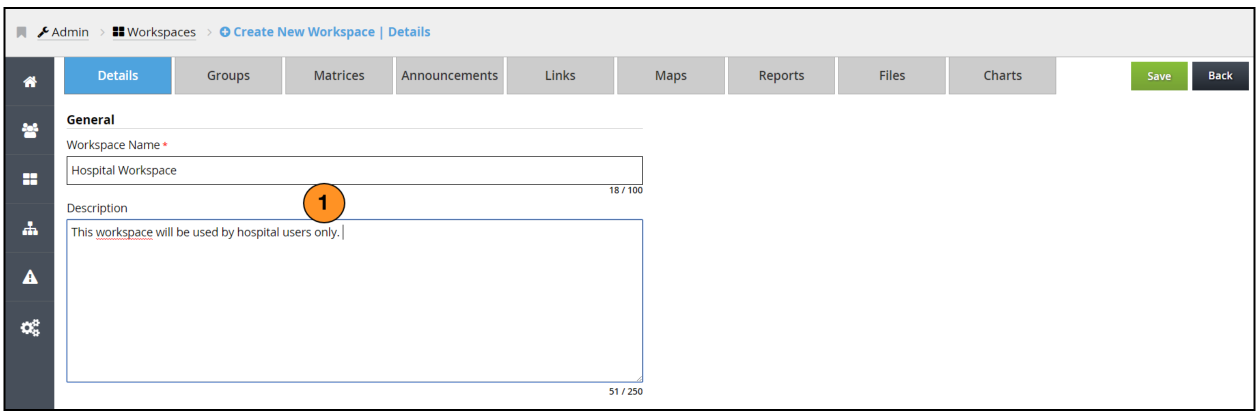


FIGURE 6-77: Create New Workspace - Details

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.

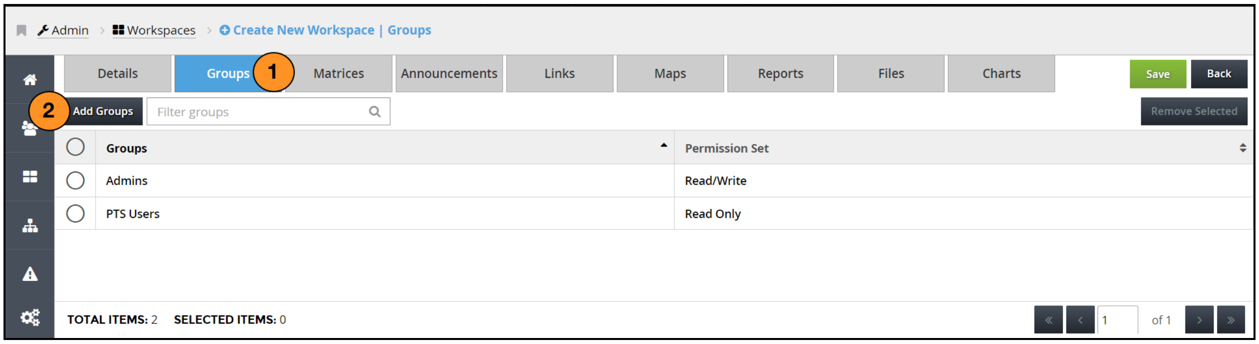


FIGURE 6-78: Create a Workspace - Groups

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.

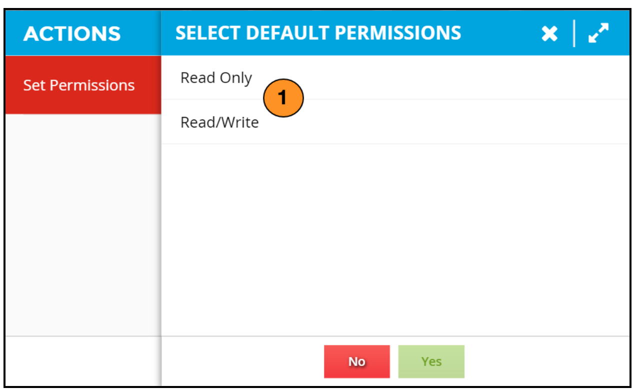


FIGURE 6-79: Create Workspace - Set Permission

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.

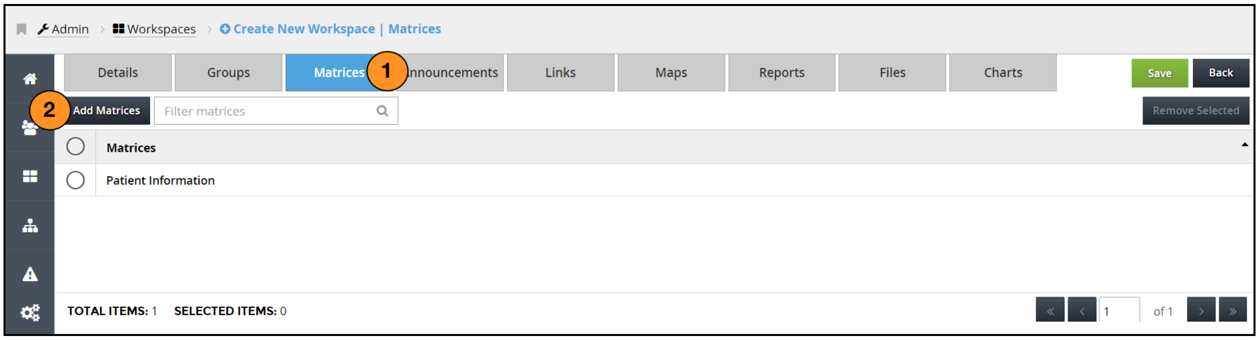


FIGURE 6-80: Create a Workspace - Matrices

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.

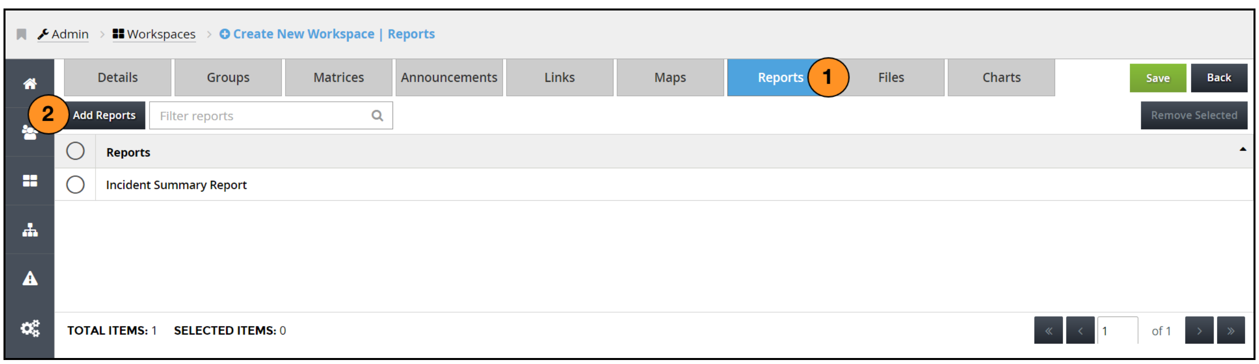


FIGURE 6-81: Create a Workspace - Reports

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.

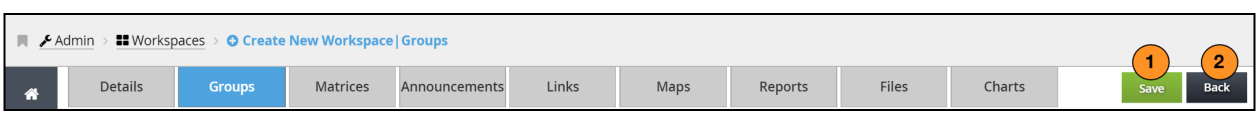


FIGURE 6-82: Save and Back buttons

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.

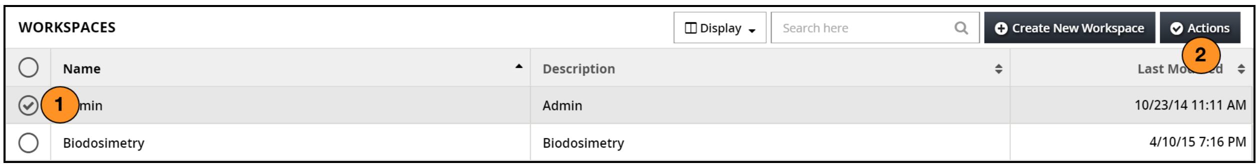


FIGURE 6-83: Actions Button

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

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

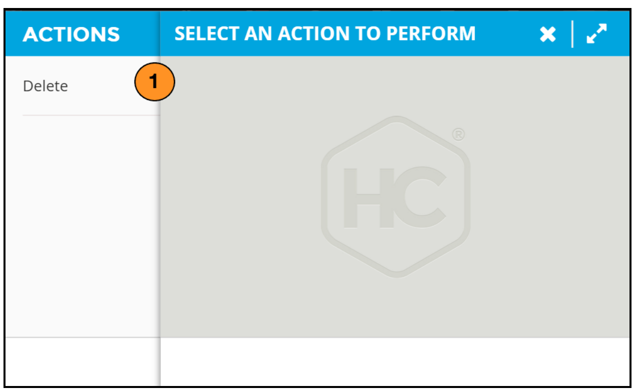


FIGURE 6-84: Workspaces - Other Actions

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.

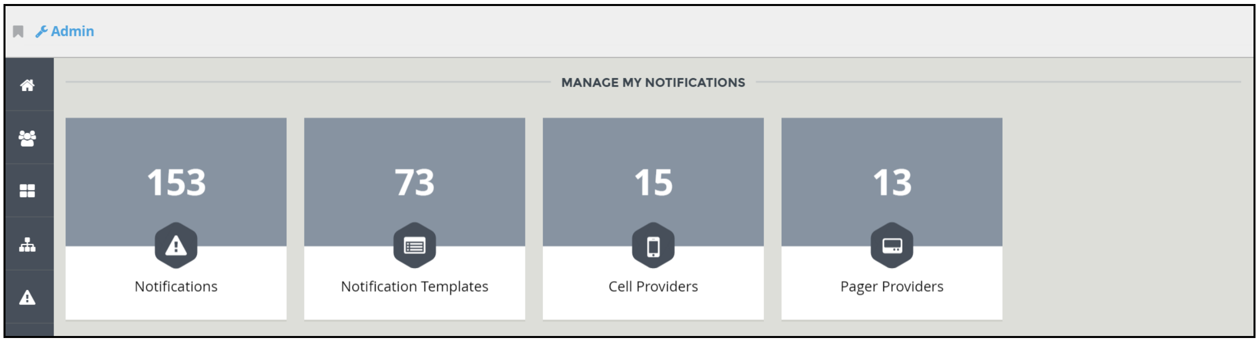


FIGURE 7-1: Notifications

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.

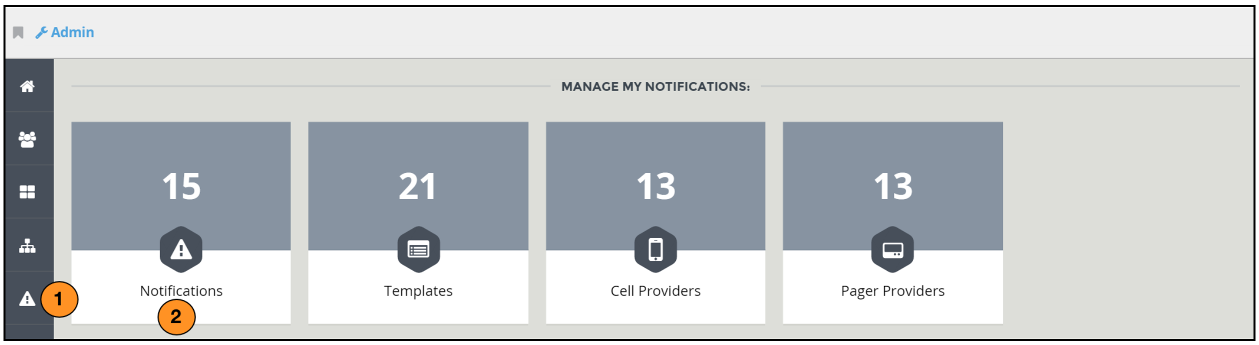


FIGURE 7-2: Notifications

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.

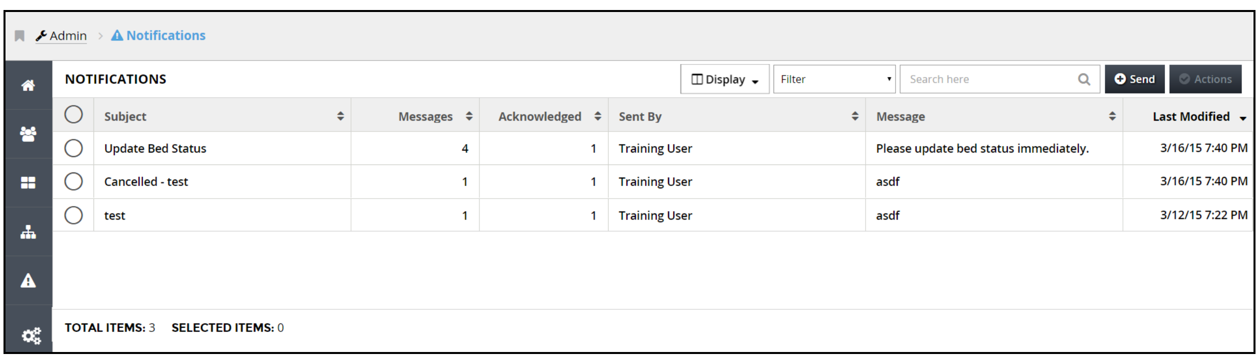


FIGURE 7-3: Notifications List

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.

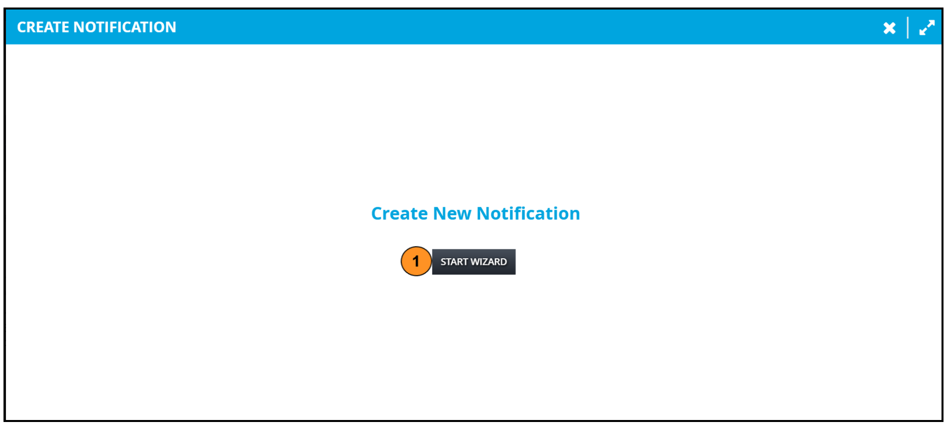


FIGURE 7-5: Create Notification

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

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

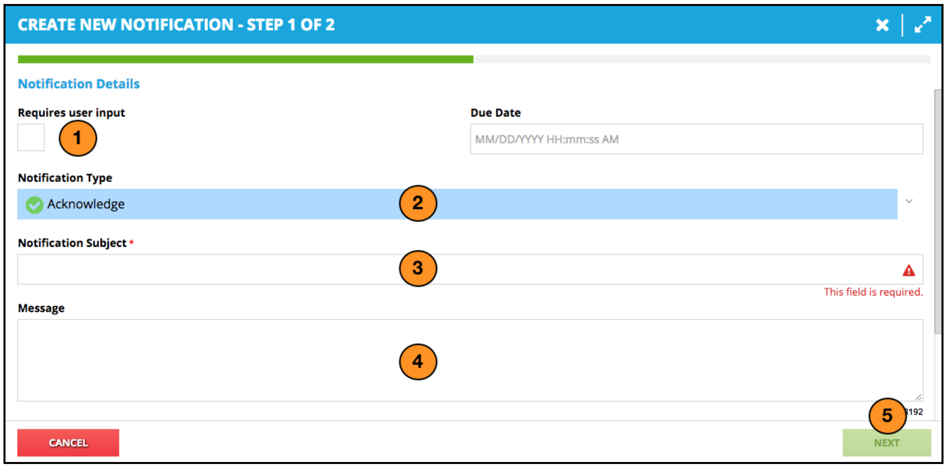


FIGURE 7-6: Create New Notification - Step 1

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

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

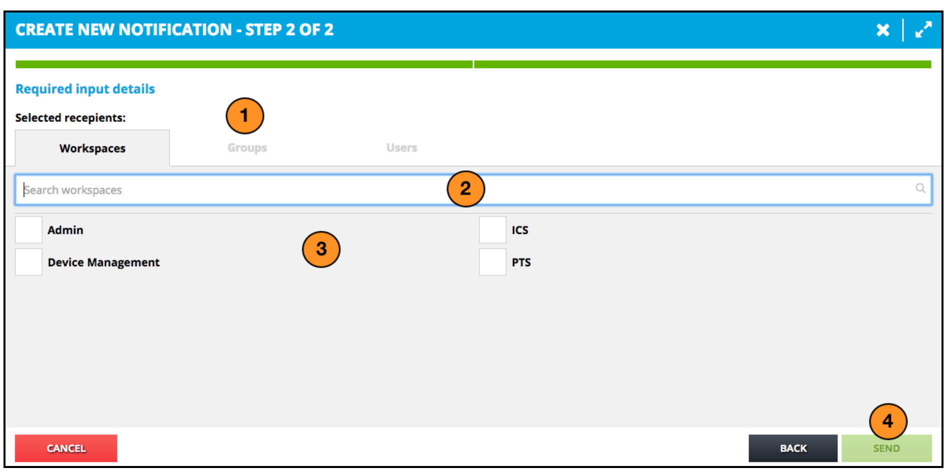


FIGURE 7-7: Create Notification - Step 2

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.

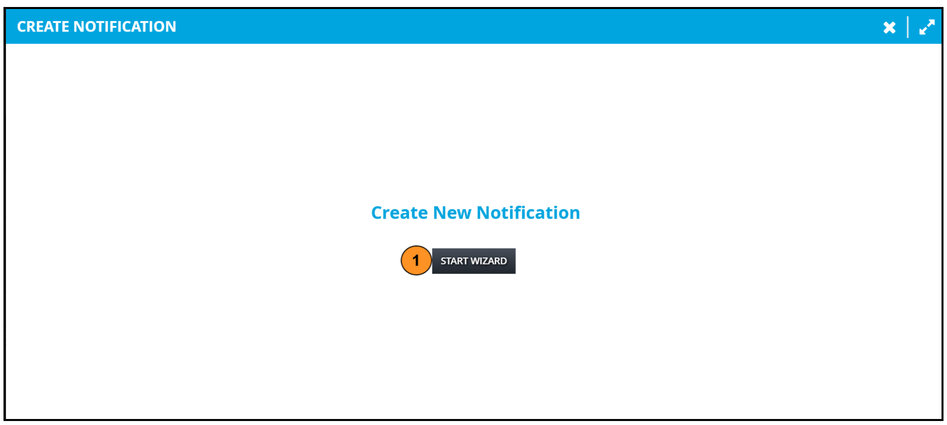


FIGURE 7-9: Create Notification

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.

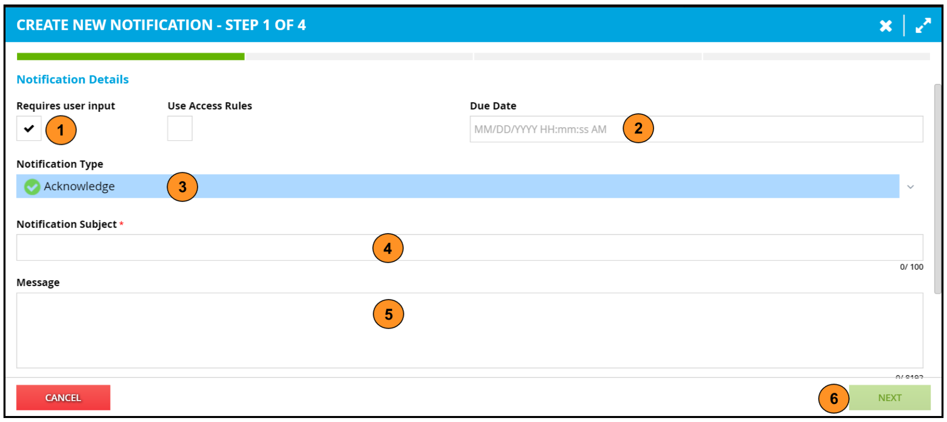


FIGURE 7-10: Create New Notification - Step 1

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.

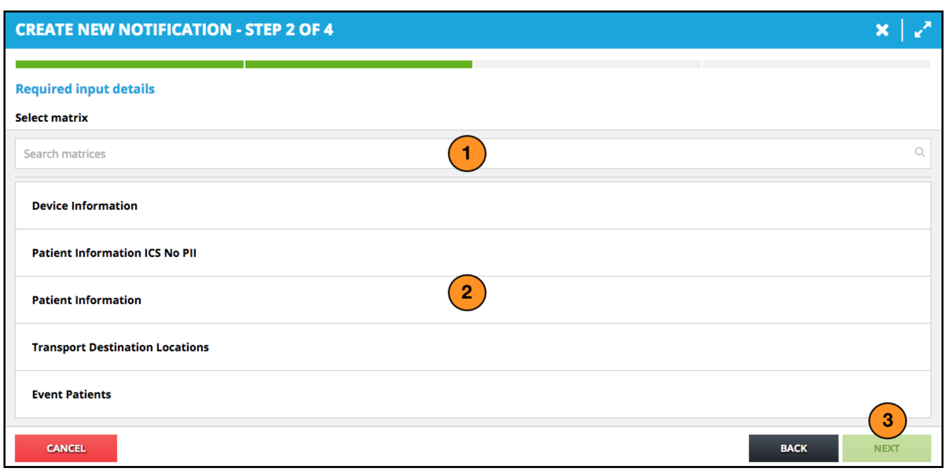


FIGURE 7-11: Create Notification - Step 2

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.

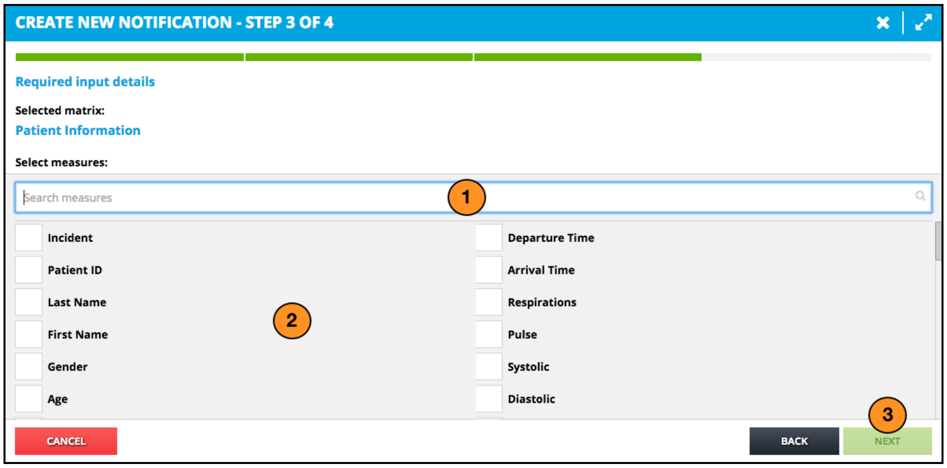


FIGURE 7-12: Create Notification - Step 3

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.

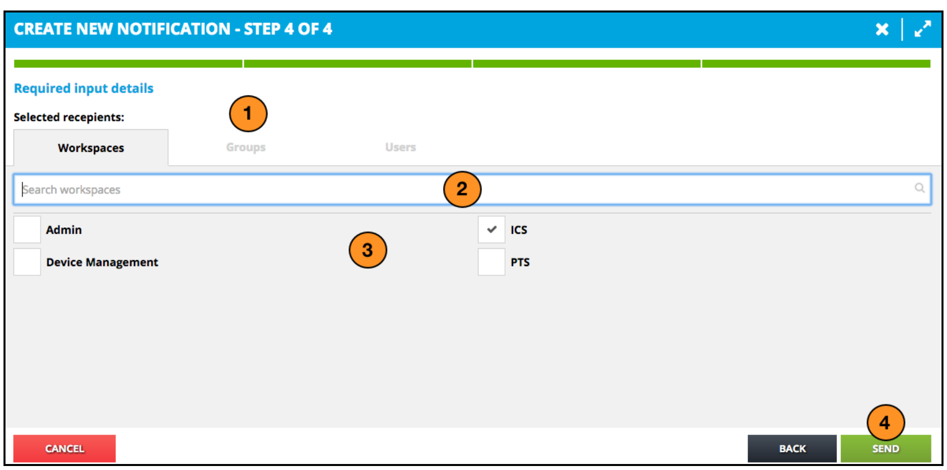


FIGURE 7-13: Create Notification - Step 4

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.

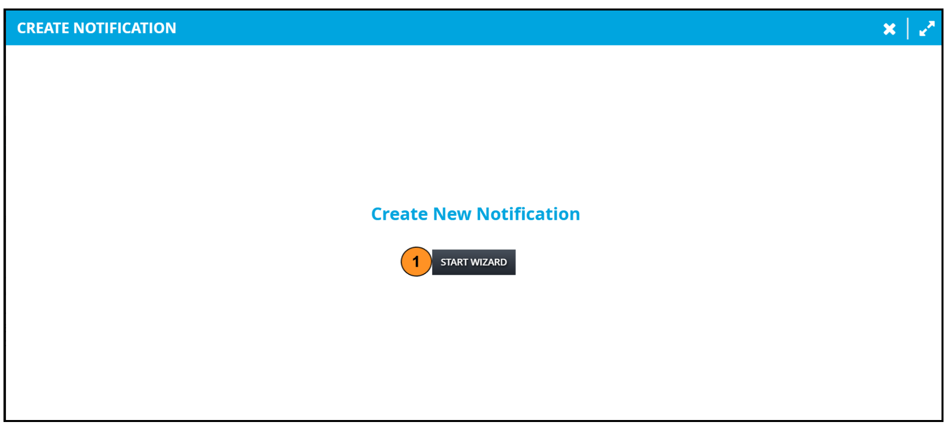


FIGURE 7-15: Create Notification

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.

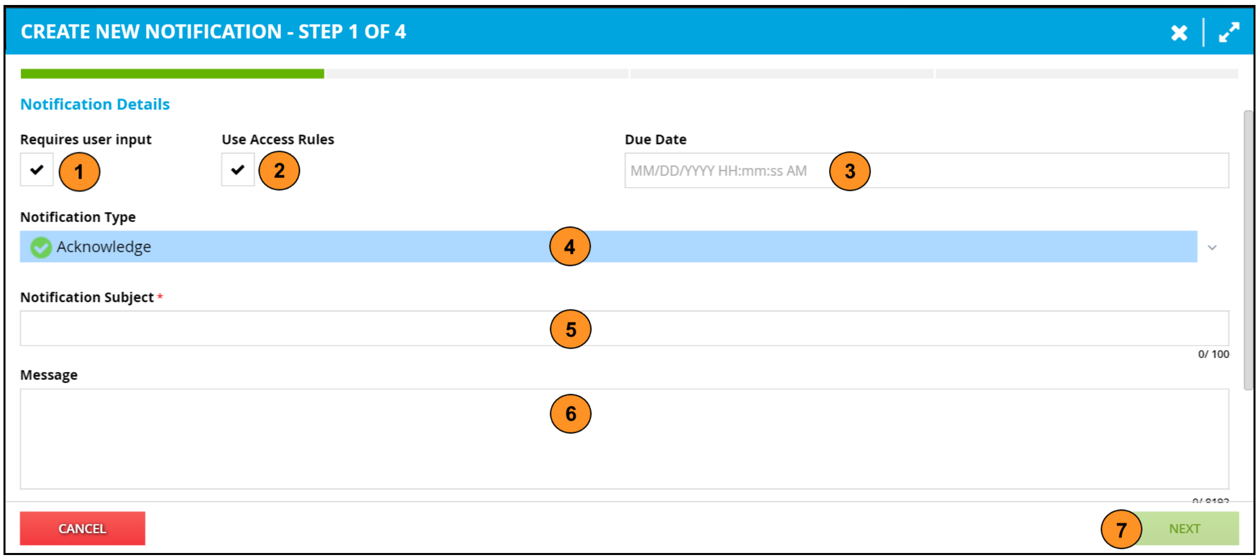


FIGURE 7-16: Access Rule Notification Step 1

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**.

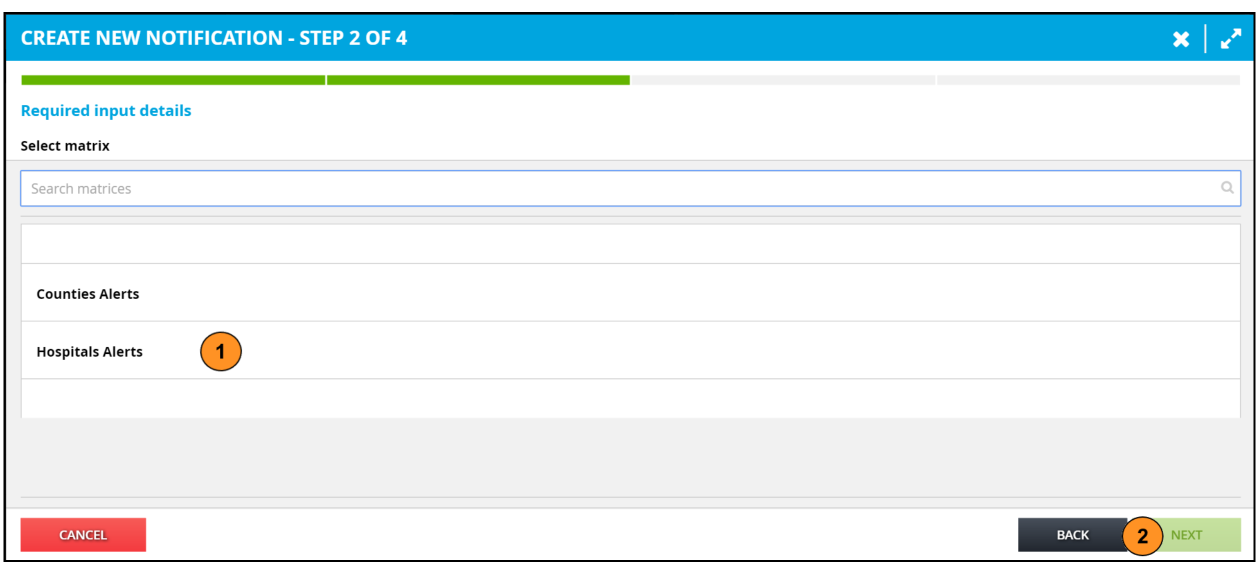


FIGURE 7-17: Access Rule Notification - Step 2

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

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

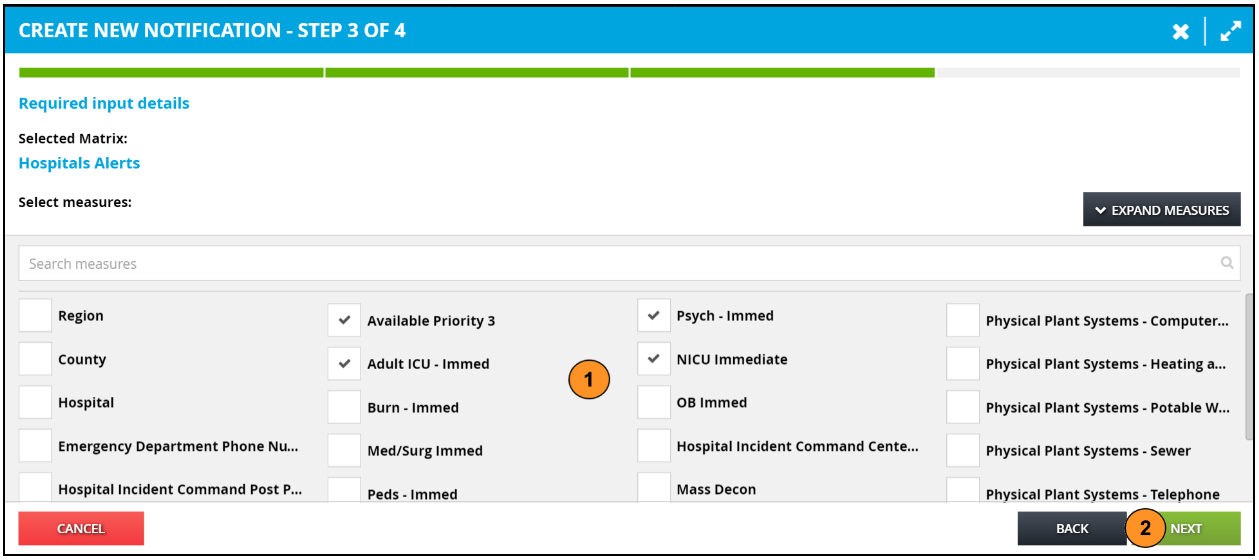


FIGURE 7-18: Access Rule Notification - Step 3

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.

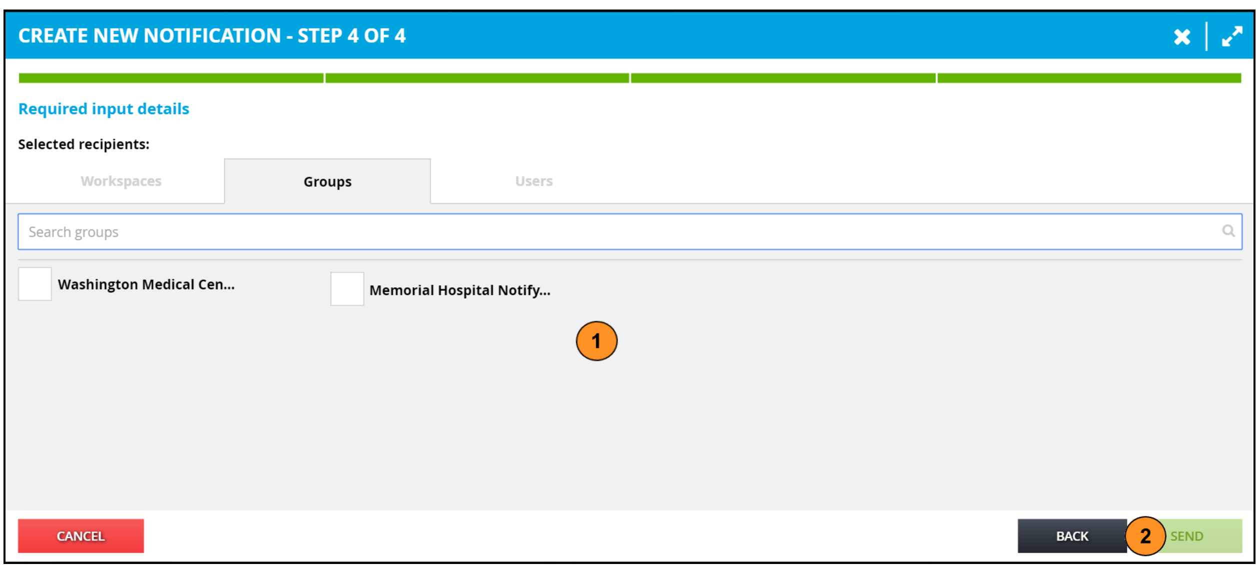


FIGURE 7-19: Access Rule Notification - Step 4.

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.

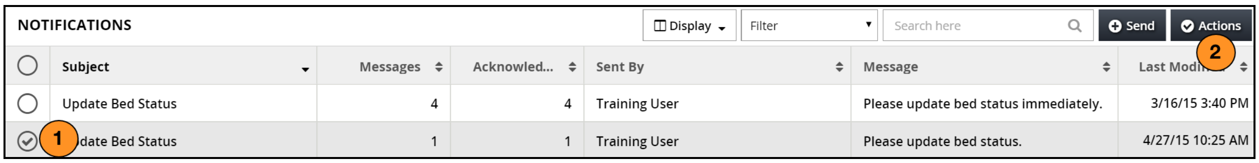


FIGURE 7-20: Actions Button

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.

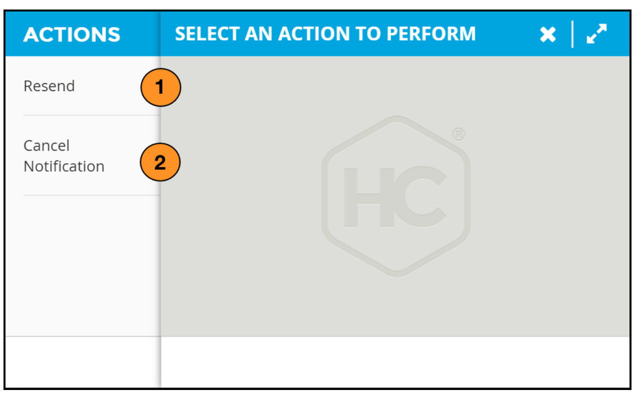


FIGURE 7-21: Notifications - Other Actions

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**.

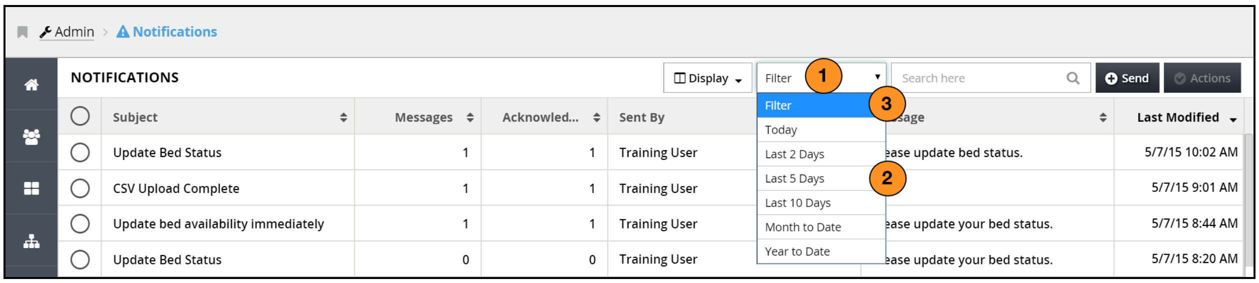


FIGURE 7-22: Filter Options

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.

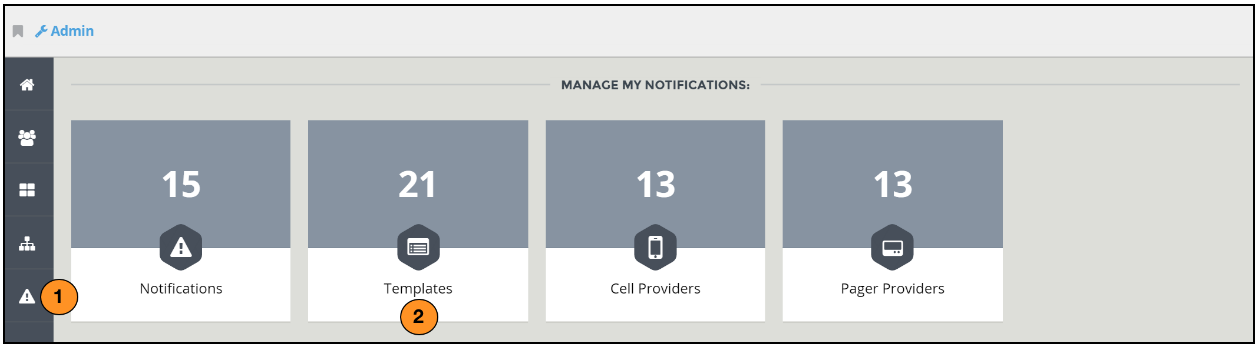


FIGURE 7-23: Notification Templates

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

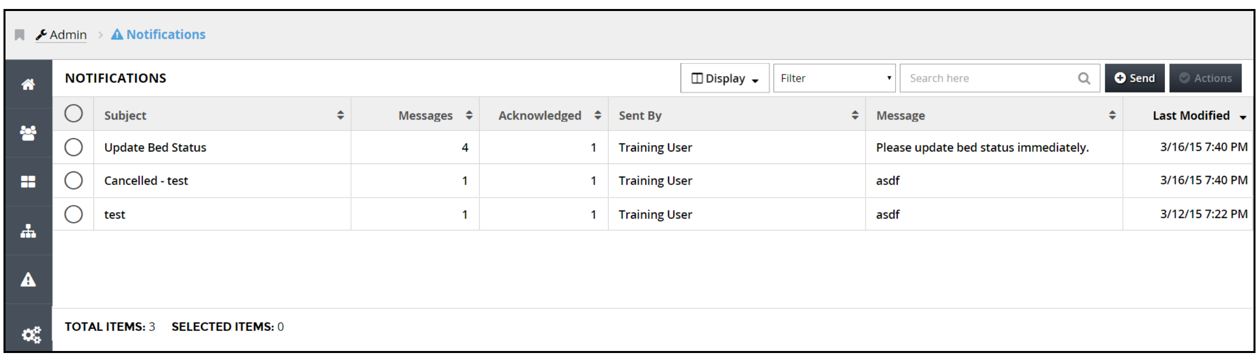


FIGURE 7-24: Notification Template List

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.

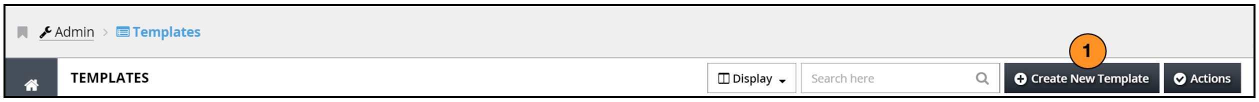


FIGURE 7-25: Create New Template Button

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.

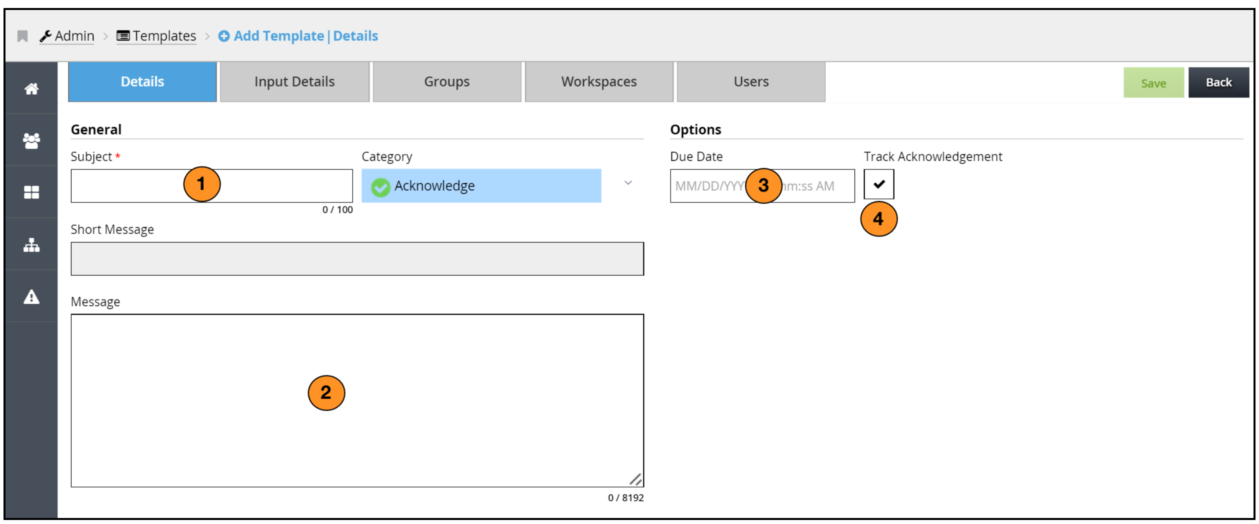


FIGURE 7-26: Notification Template

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.

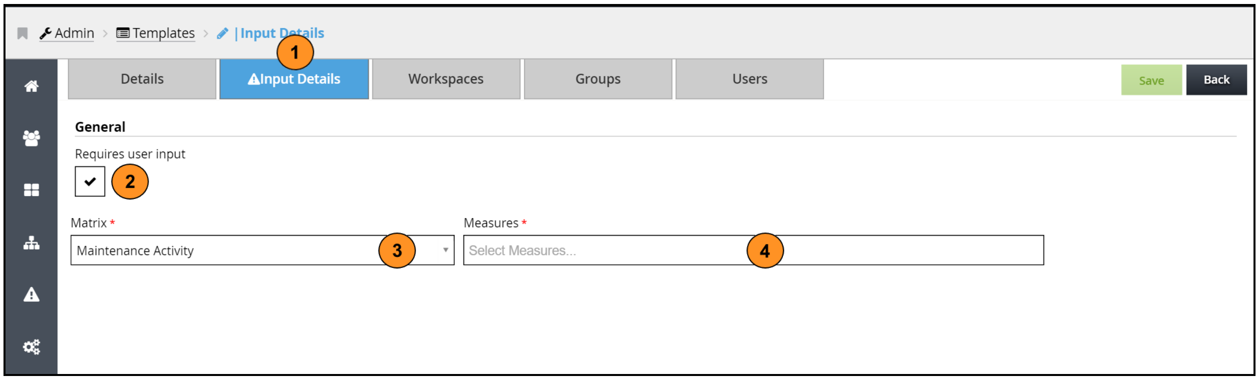


FIGURE 7-27: Notification Template - Input Details

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.

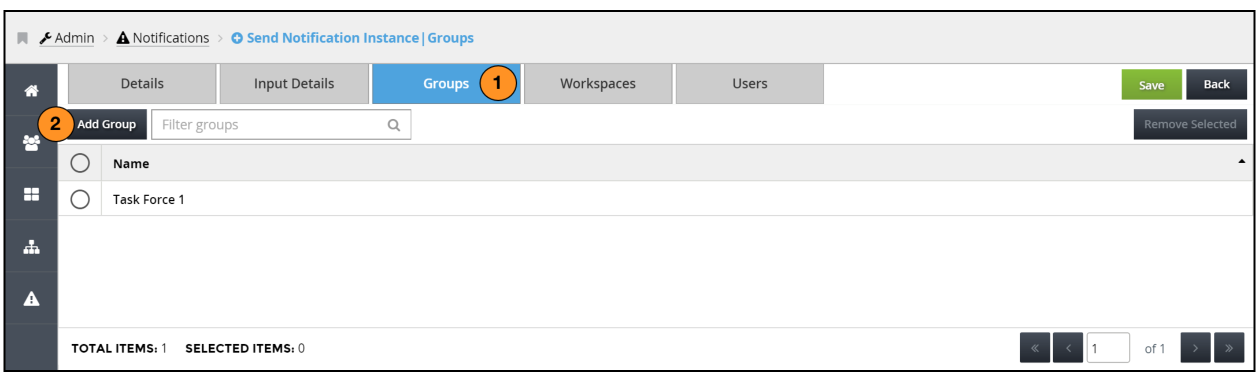


FIGURE 7-28: Notification Template - Groups

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.

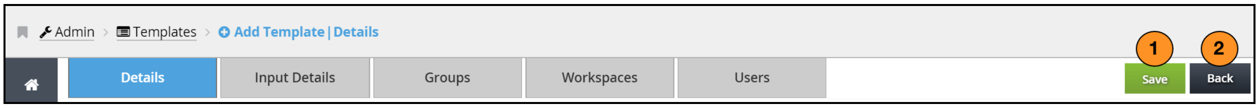


FIGURE 7-30: Save and Back buttons

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.

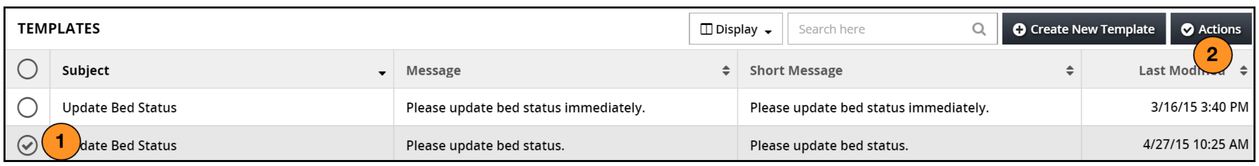


FIGURE 7-31: Actions Button

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.

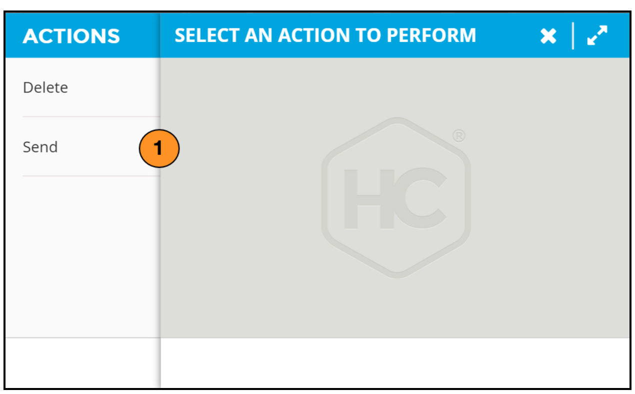


FIGURE 7-32: Notification Templates - Actions

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.

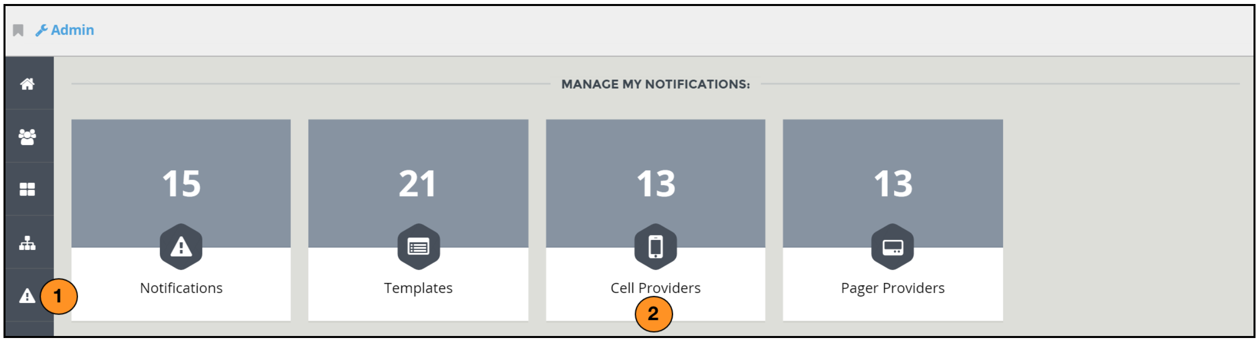


FIGURE 7-33: Cell Providers

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.

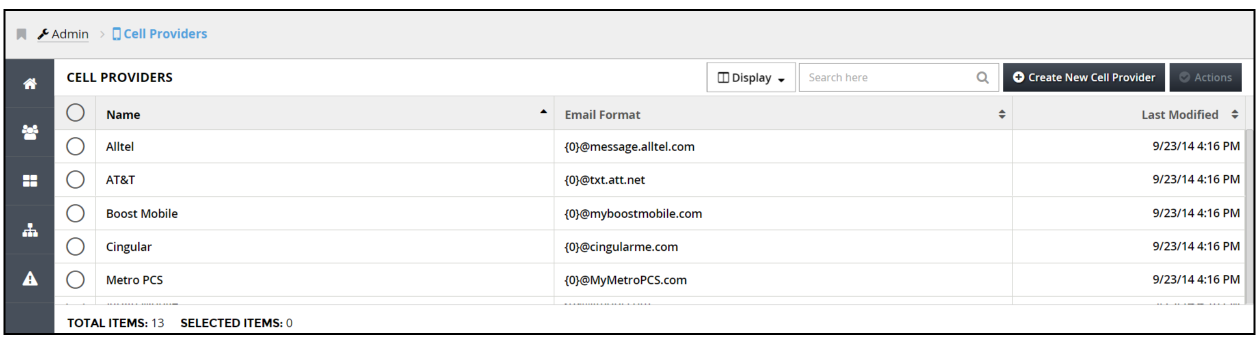


FIGURE 7-34: Cell Providers List

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.

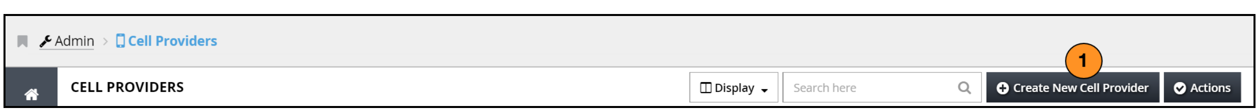


FIGURE 7-35: Create New Cell Provider Button

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

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

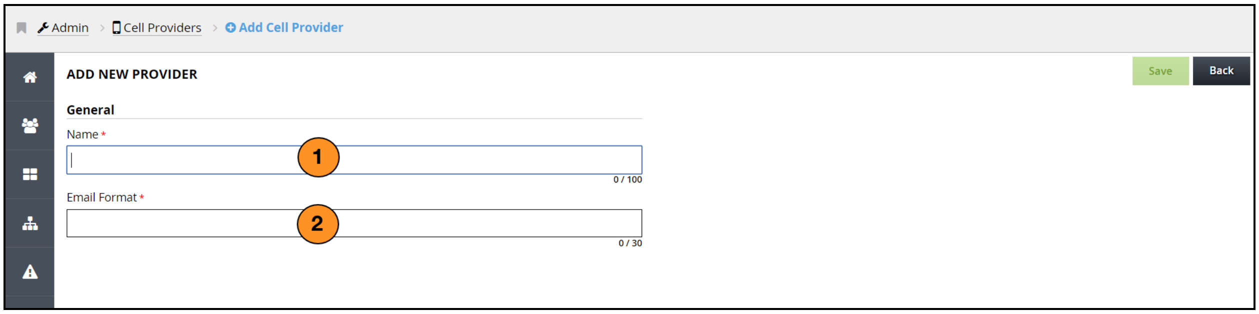


FIGURE 7-36: Create New Cell Provider Dialog

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.

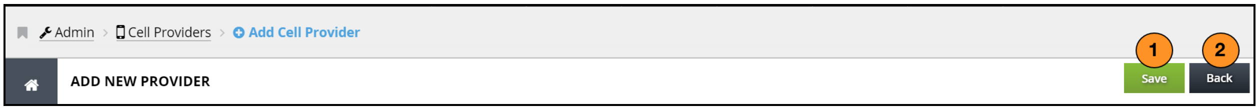


FIGURE 7-37: Save and Back buttons

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.

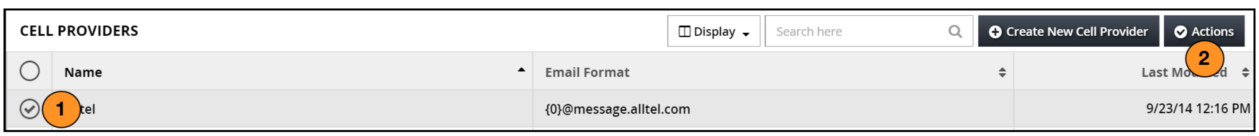


FIGURE 7-38: Actions Button

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

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

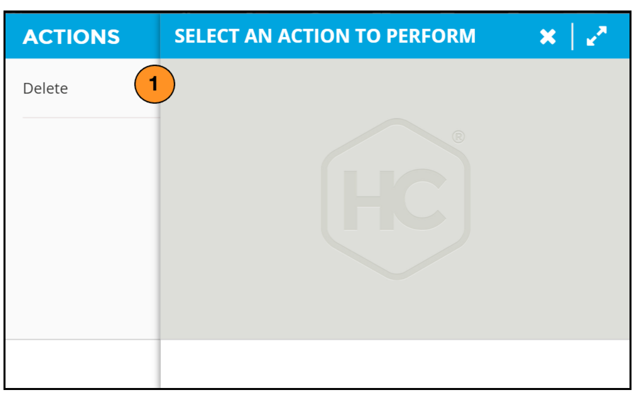


FIGURE 7-39: Cell Providers- Other Actions

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

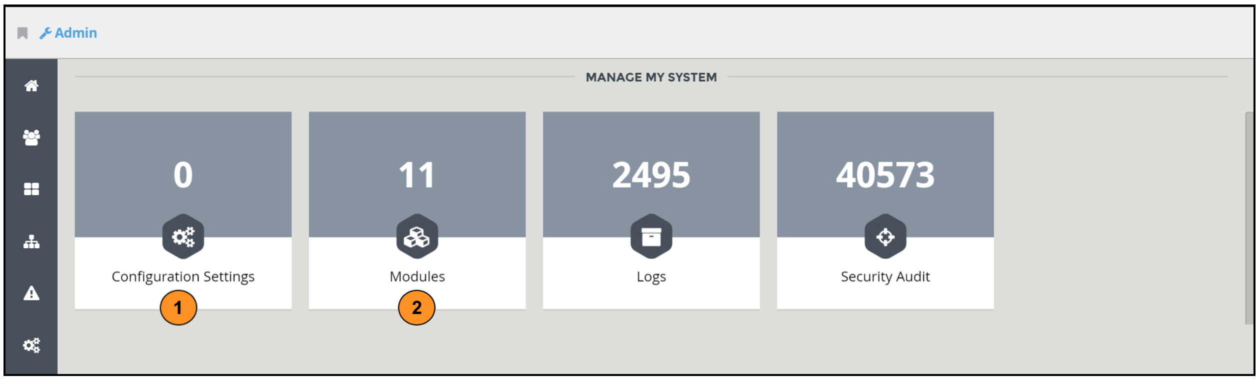


FIGURE 8-1: Manage My System

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.

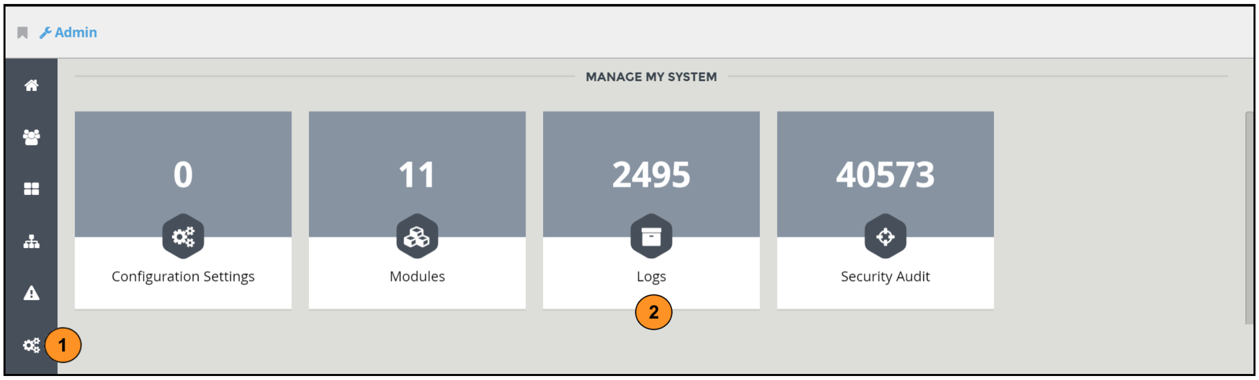


FIGURE 8-2: Logs

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.

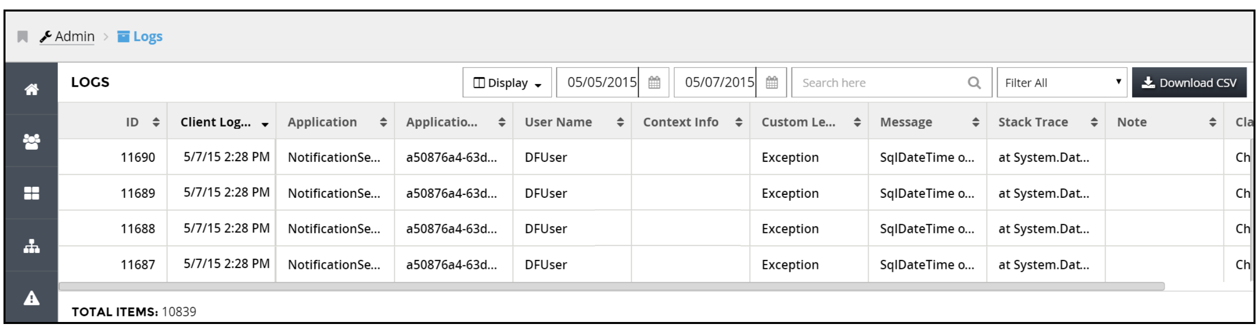


FIGURE 8-3: Logs List

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.

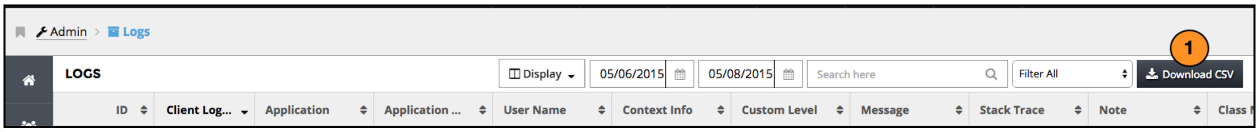


FIGURE 8-4: Download CSV button

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.

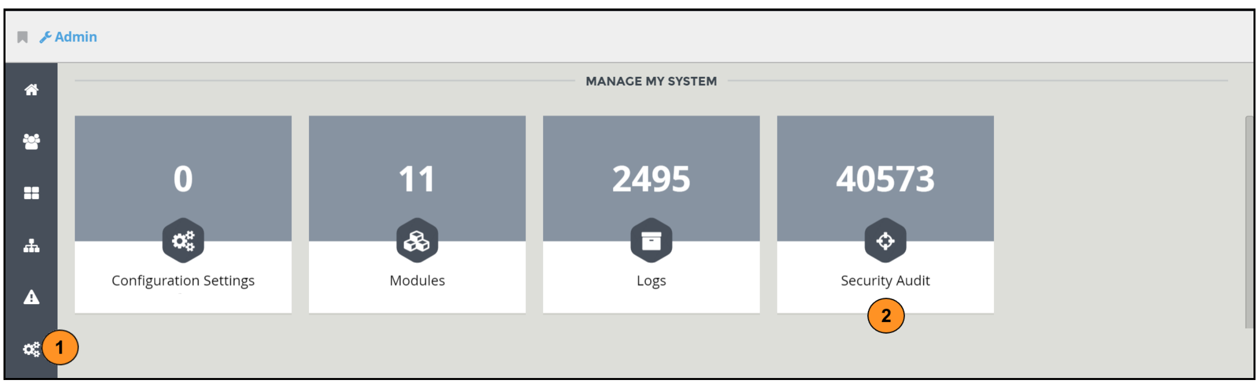


FIGURE 8-5: Security Audit

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.

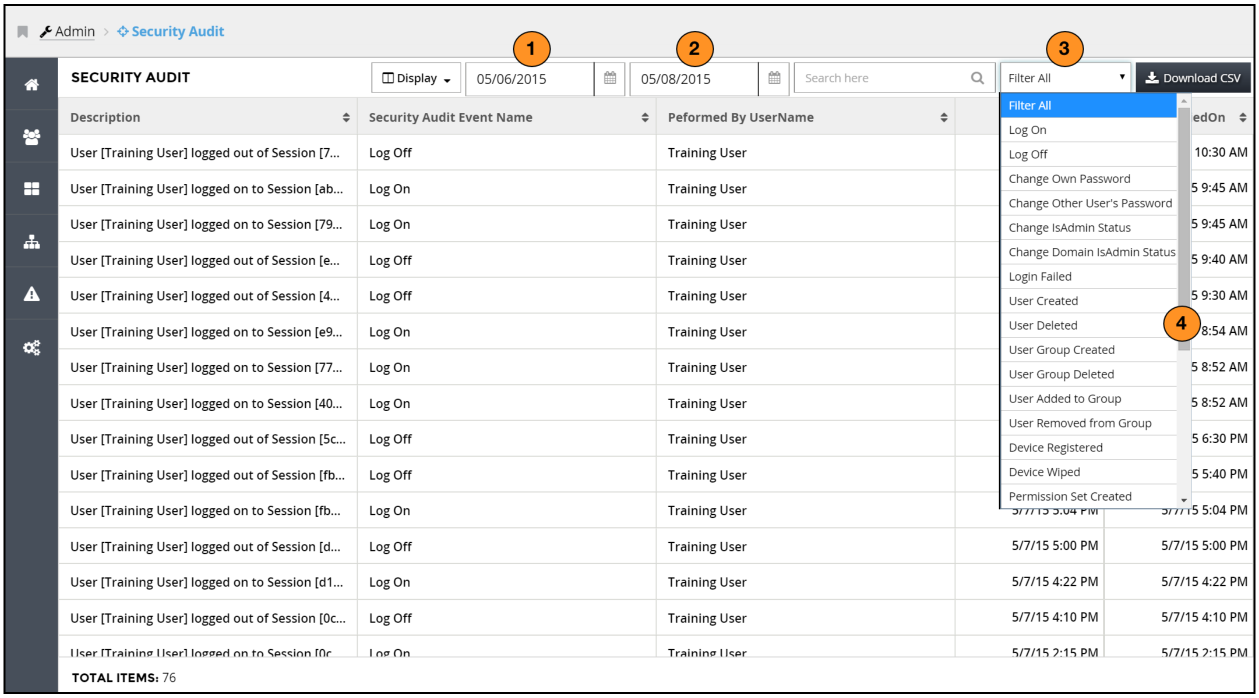


FIGURE 8-6: Security Audit List

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.

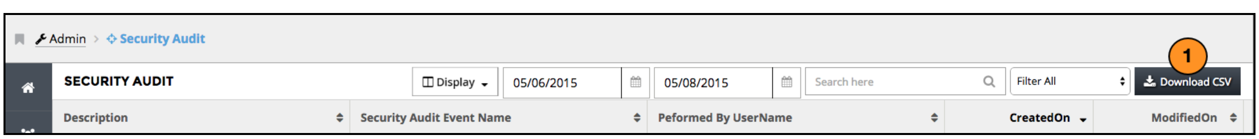


FIGURE 8-7: Download CSV button

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.