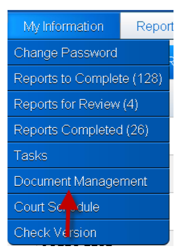
DOCUMENT MANAGEMENT

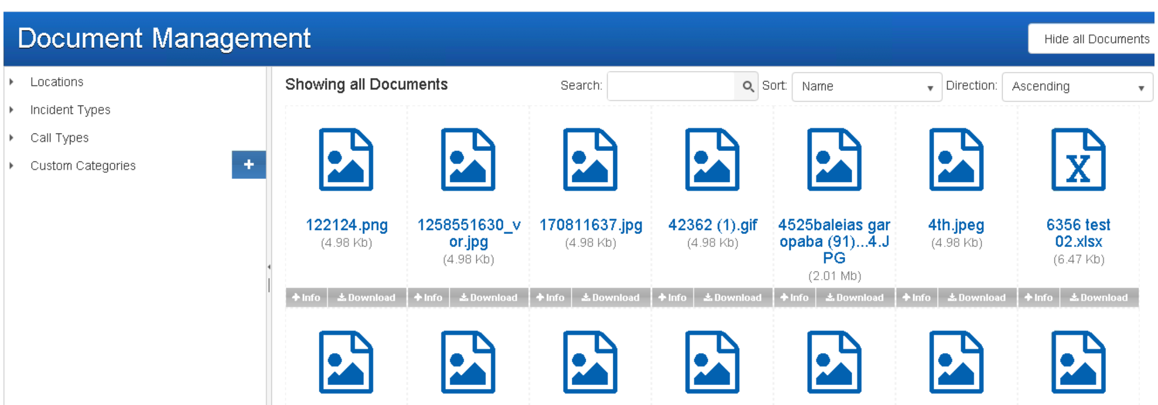
Uploading Documents – Locations, Incident Types and Locations

The Document Management Module of Report Exec replaces the Group Notes and Group Documents. Through Document Management, organizations have the ability to upload documents as system wide documentation, or specific to a Group. In addition to being able to link documentation to a specific location, incident type or call type; organizations have the ability to create more custom documentation to step a user through emergency or crisis events. Unlike Group Notes and Documents, where only Group Supervisors could add information, Document Management has been added as a module that organizations can provide access to through the Roles function in Admin.

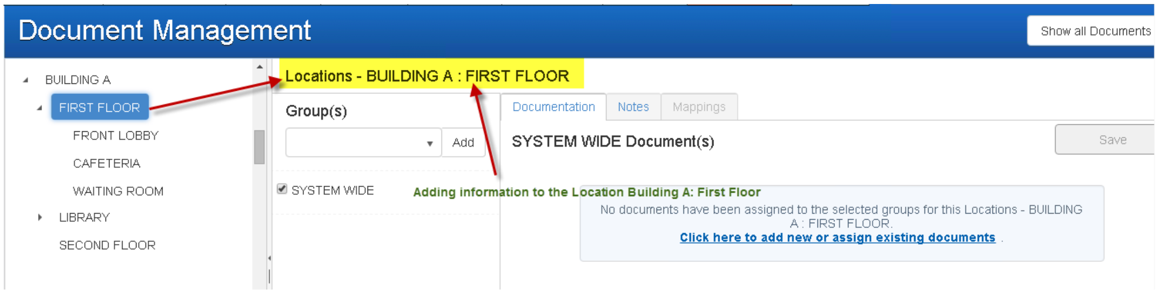
To access Document Management, go to My Information > Document Management (If you do not see Document Management you will need to enable the module in the Group and your Role)



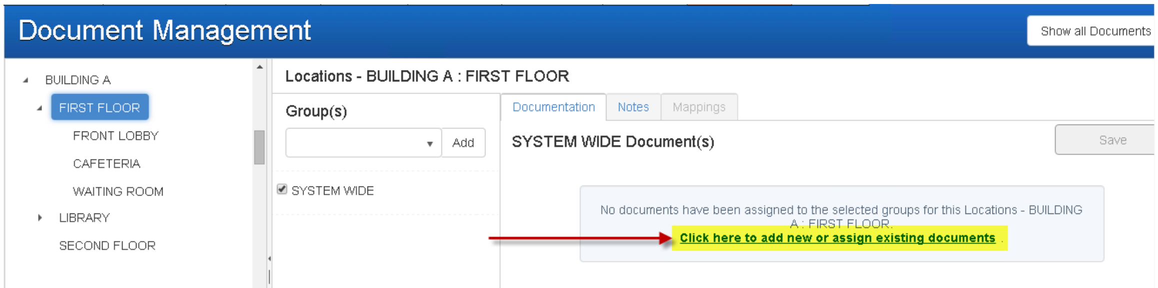
Once the Document Management module is opened, a user will see all documents that have been uploaded through System Wide or their Group.



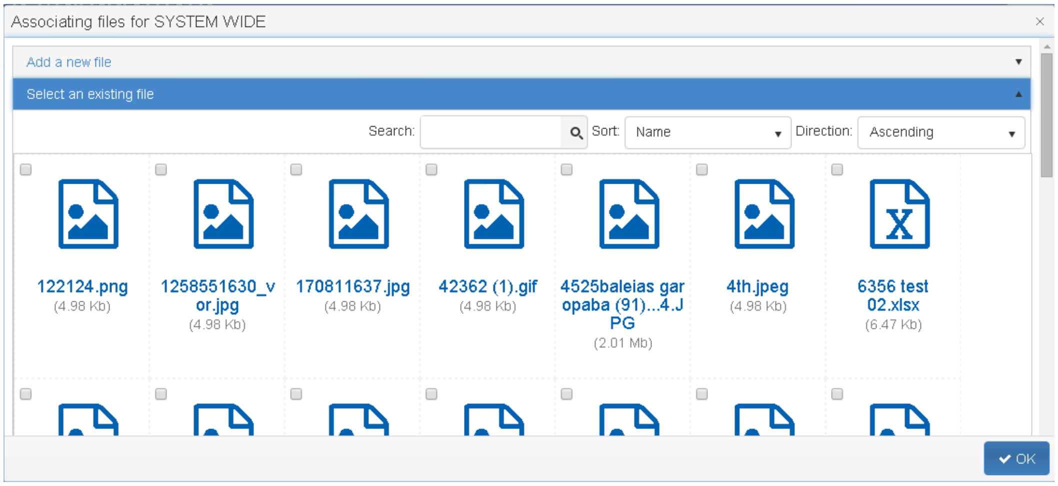
To add a new document, click the arrow to the left of Locations, Incident Types or Call Types to open the listing (Custom Categories will be discussed later), and click the item to add the documentation to.



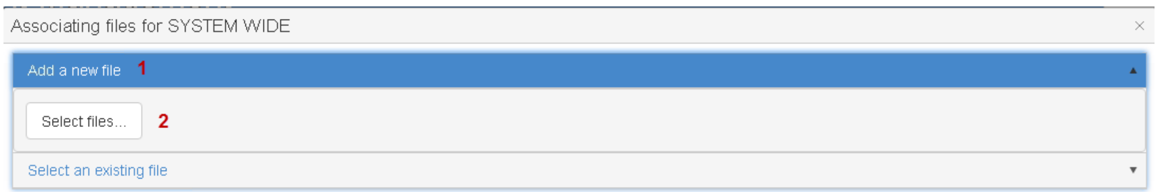
To add a new document, or link a document already uploaded to the system, click the link to add or assign existing documents.



Clicking the link will open a page to select a previously uploaded item, or add a new item

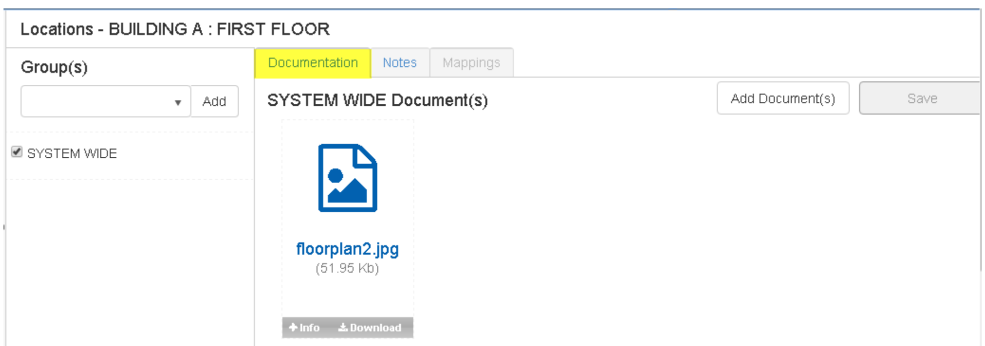


To add a new file, click Add a New File, then click the Select button that shows after clicking

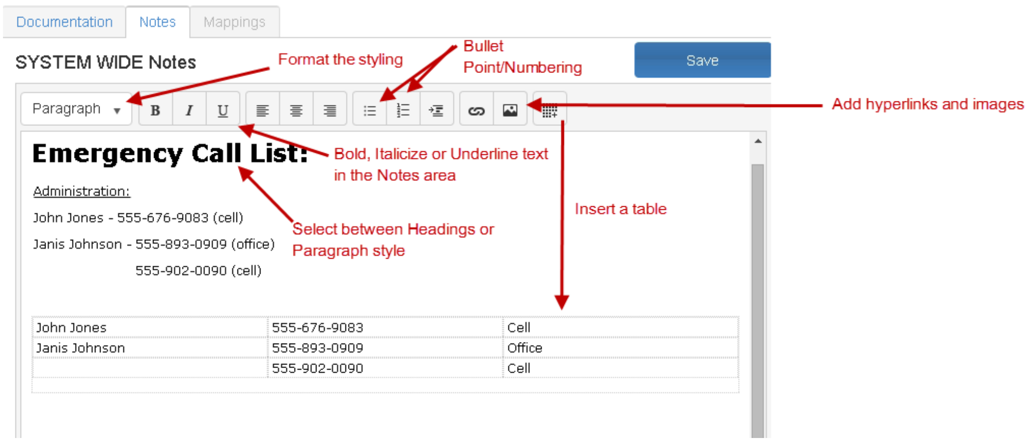


Once the file is browsed to, double click to select, at this point it is not uploaded to Report Exec, but is displayed on the page. Please note, multiple files can be attached at the same time.

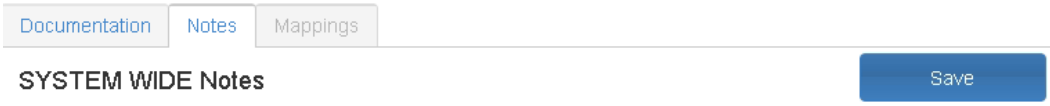
Click Upload files to save the file(s) to Report Exec. Once the file(s) are uploaded, you will be brought back to the original page to select an existing file or add a new file, close that window and the uploaded file will be visible linked to the location/incident type/call type that was selected in the Documentation tab



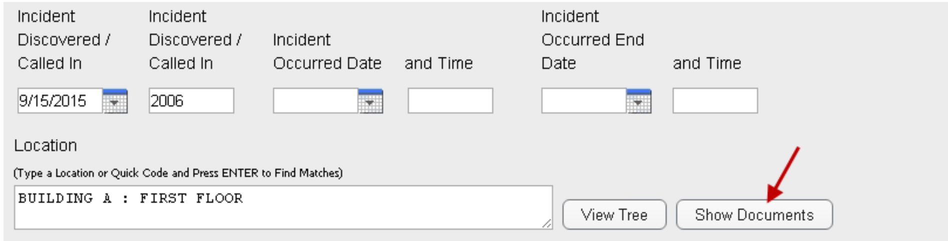
To add Notes to the location, click the Notes tab. When adding Notes, users have the ability to use different styles (i.e. Heading 1, Heading 2, Paragraph (Normal), etc.); **bold**, *italicize,* <u>or underline</u> text; change the justification; bullet point or number; embed images; insert hyperlinks and add tables.

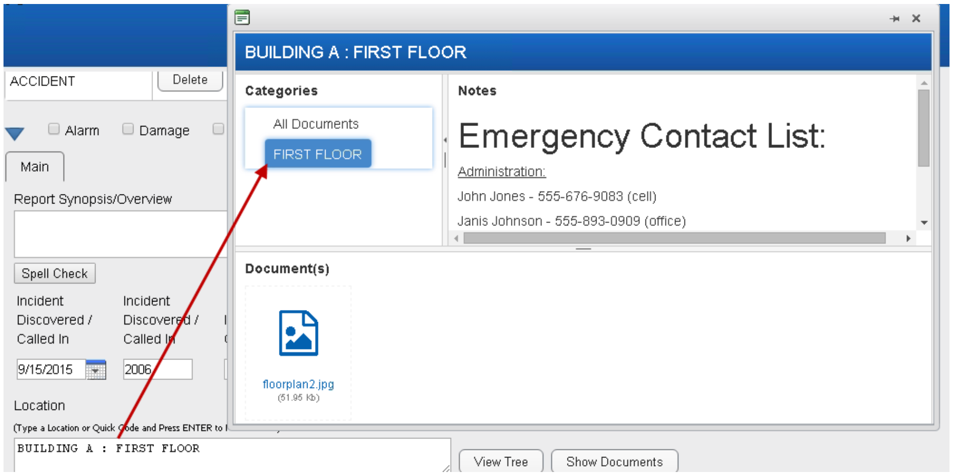


Make sure to click Save after making updates



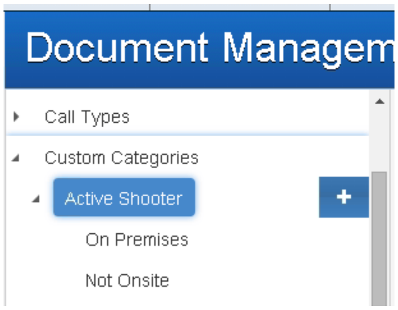
When an item is selected that has file(s) associated, a "Show Documents" button displays to the right of the selection.



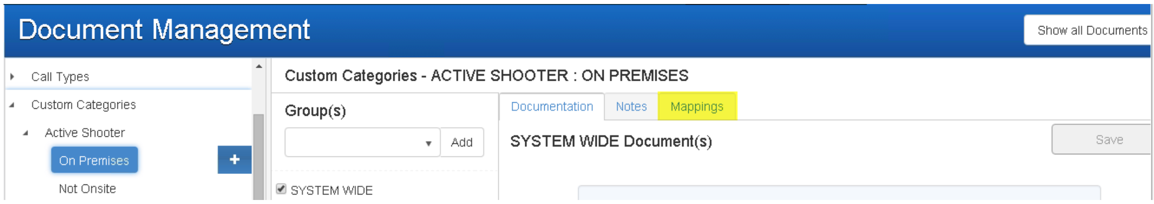


Custom Categories

The Custom Categories option gives organizations the ability to step their users through an event. In the below example there is a category for Active Shooter that breaks down to whether the individual is still on premises or has left.



To upload documentation or attach notes, a user should follow the same steps as adding a new file. When using the Custom Categories option, a third tab titled "Mapping" becomes active.



Mapping the information to a specific Location, Incident Type or Call Type is required. To map an item:

1. Click the Mapping tab
2. Select a Type (Incident Type, Location, Call Type)
3. Once selecting a type, click the "Select" button and select the proper item that corresponds to the type that was selected
4. Click Add Map