

Quick Reference Guide for Administration

Basic User Management

Register Myself

1. On your site's home page, click the **Register Now** button.
2. Complete the registration form and click **Save**.

Register a User

1. Log in to the system.
2. Go to **Administration: Accounts**.
3. Complete the registration form and click **Save**.

Note: In your system, a user may be referred to as *responder*, *volunteer*, or *recipient*.

Update a User's Password

1. Open the user's profile window. To do so, search for the user and then click his or her name in search results.
2. Click the **Account Settings** tab.
3. Enter and confirm the new password. Be sure to follow the password guidelines.
4. Click **Change**. After you change the password, the user will receive an email with his or her username and new password.

Reset Password

* New Password:

* Retye New Password:

× Password must be 6 characters or longer
× Password must contain a number
× Password must contain a letter
× Confirmation password must match

Must be at least six (6) characters in length and contain at least one (1) numeral, one (1) letter, and no spaces. Passwords are case-sensitive.

Change

TIPS

- ✓ Password strength is important because it makes it harder for an intruder to gain access to the user's account.
- ✓ The password strength indicator will help you choose a strong password. As you type, the indicator shows whether the new password meets the requirements.

Notes

Account Status

Active - Users can log in, manage their profiles, have unit membership, and receive messages from an administrator.

Inactive - Users do not appear in search results and cannot be contacted by an administrator. They may receive non-emergency notifications related to the status of their account.

Closed - Users cannot log in or receive notifications. An administrator can reopen a closed account.

Archived - Accounts that are no longer used. An administrator cannot reopen an archived account.

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Search for Users

1. Go to **Responders: Responder Search**.
2. Enter the user's name or the desired search criteria.
3. Click **Search**.
4. Once you find the user in the search results, click his or her name to open the user's profile window.

You can also search for users using the quick search bar.

[? Help Center](#) | [Log Out](#) |

Search Results

Sort By
Name

Check All 51-100 of 200

#	<input type="checkbox"/>	Defilippi, Andrew	0 % Complete	Mifflin County PA 88439
A		Independent Clinical Social Worker		
B		Show more information		
C	<input type="checkbox"/>	Deutschendorf, Barbara	0 % Complete	Butler County PA 78052
D		Medical Records and Health Info... (ECL 4)		Drafter, Civil
E		Show more information		
F	<input type="checkbox"/>	Deutschendorf, Bernard	0 % Complete	Bradford County PA 90007
G		Drafter, Civil		
H		Show more information		
I	<input type="checkbox"/>	Diering, Nicholas	0 % Complete	Lycoming County PA 54730
J		Registered Nurse (ECL 4)		
K		Show more information		
L	<input type="checkbox"/>	Doman, Brian	0 % Complete	Dauphin County PA 69397
M		Respiratory Therapy Technician		Nurse Practitioner (ECL 3)
N				
O				

Note: The **Responders** and **Responder Search** tabs might have different labels in your system.

Notes

You can search for users by account type, i.e., the user's role in the system.

System Administrator
Client support staff.

System Coordinator
Can access user accounts at the state level and create a user account with any role.

Local and Regional Administrators
Can create and access user accounts only at the organizational level as defined by system administrators.

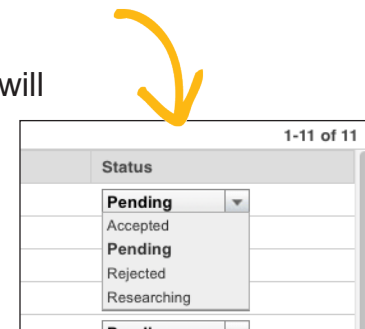
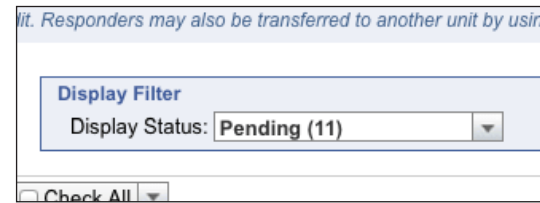
User
A basic role that allows for receiving messages and having membership in one or more organizational units. May also be referred to as responder, volunteer, or recipient.

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Membership Functions

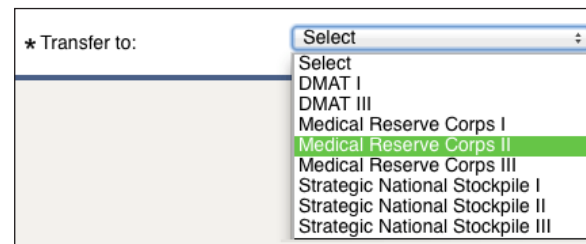
Approve User Membership

1. Go to **Responders: Units**.
2. Click the name of the unit you want to manage.
3. On the page that opens, use the drop-down menu in the corresponding row to change the user's status to **Accepted**.
4. Click the **Save Changes** button to save the user's new status. You will see a list of the most recently approved users.
5. Click **Continue** to return to the list of unit members.



Transfer User Membership

1. Go to **Responders: Units**.
2. Click the name of the unit containing the users you want to transfer.
3. Select the check boxes next to the users you want to transfer.
4. Select **Transfer Recipients** from the **Action** drop-down menu.
5. From the **Transfer To** drop-down menu, select the unit you wish to transfer users to.
6. Click **Submit Action**.
7. On the page that opens, enter a message to administrator(s) providing a reason for this transfer.
8. Click **Submit**.



Note: *Units* may be referred to as *organizations* or *categories* in your system.

Notes

Pending

Refers to a user who has not yet been accepted into this unit.

Accepted

Refers to a user who is an approved member of this unit. Users must have this status in order to receive messages sent to this unit.

Researching

May be used by an administrator to indicate that a process has been initiated to determine whether this user may be accepted into the unit.

Rejected

Refers to a user who has been formally denied membership in this unit.

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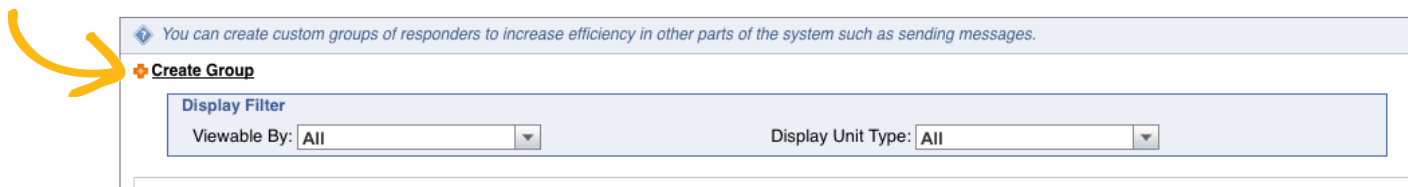
Membership Functions

Create Groups of Users

1. Go to **Responders: Groups**.
2. Click **Create Group** and enter the information requested. Note that you must choose a unique name for this group.
3. Click **Save Changes**.

Add Users To a Group

1. Go to **Responders: Groups**.
2. Click the name of the group to which you want to add users, then click the **Add Responders** button.
3. On the search page, enter details about the users you want to find and click **Search**.
4. Select the check boxes next to the users you want to add.
5. Click **Add Responders**.



TIPS

- ✓ Create groups to store frequently-used lists of recipients for messages.
- ✓ You can delete a group using the **Action** drop-down menu at the bottom of the page.

Notes

Units vs. Groups

Units are organizational structures that hold users for administrative purposes. Users must be approved into a unit prior to gaining access to the full functionality of the system.

Groups are ad hoc collections of users for the purpose of saving administrators time. Think of groups as a saved search that you can use over and over when choosing recipients for a message.

Quick Reference Guide for Administration

Profile Photo Management*

* This function may not be available in some of your systems.

Take a User's Photo


1. Open the user's profile window and go to **Account Settings**.
2. Scroll down to the **Responder Photo** section.
3. Click the **Take Photo** button.
4. If prompted by the browser, follow the instructions to enable the Adobe Flash® Player.
5. Make sure the camera is positioned in front of the user's face and click **Take Picture**.
6. Once captured, the new photo will be automatically uploaded.

Upload a User's Photo

1. Open the user's profile window and go to **Account Settings**.
2. Scroll down to the **Responder Photo** section.
3. Click the **Browse** button and select the image.
4. Click **Upload** to upload the photo.

Responder Photo

Current Photo:



* Update Photo:

Take Photo

A webcam and Flash are required.

— OR —

Browse...

The photo must be of type GIF or JPEG and may be no larger than 600000 bytes in size.
Uploaded images should have an aspect ratio of

Notes

Before taking a photo, make sure your web camera is connected and you have Adobe Flash® Player installed on your computer.

The image you're uploading must be in the .jpeg or .gif format and no larger than 600 KB in size.

Recommended photo aspect ratio is 3:4. If the image dimensions are different, it will be resized, which might cause some distortion.