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Bioterrorism Readiness Suite™ 4.1 Administrator Guide

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1 Introduction

Welcome to the BTRS 4.1 Administrator Guide!

BTRS administrators perform additional functions to ensure the efficiency and security of the BTRS portal. These tasks include setting permission levels and assigning user licenses to other BTRS users.

In order to accomplish these important tasks, you must first understand the requirements of the BTRS system, as well as the different types of licenses available and the associated activities each license enables users to perform.

This chapter provides you with information about:

- BTRS, including what's new for this version
- How this guide has been put together
- Using this guide and the BTRS portal
- Technical aspects of administering the BTRS portal
- Differences between the three user license levels

What Is Bioterrorism Readiness Suite?

Bioterrorism Readiness Suite™ (BTRS) serves as a single, central point of log-on and access for finding, creating, and sharing information through a browser-based interface. If you have access to the Internet, you can access BTRS' portal content and collaboration areas, links to resources and applications, alerts, notification functions, and the role-based directory. Like any Web site, you simply click on buttons and links to access content and perform functions.

BTRS enables you to:

- Send alerts to and receive alerts from other users within your health area network (HAN)
- Securely share and collaborate on documents
- Locate contact information for other users within your HAN
- Read your HAN's latest news and announcements
- Manage users, roles and role groups
- Manage portal content and settings
- Generate reports

What's New in This Version?

BTRS 4.1 includes the following additional features and improvements over BTRS 3.0:

- *Customizable role alerting priority* — BTRS Administrators can assign roles an alerting priority from 1 (as highest priority) to 10 which determine the order that notifications are sent to users during an alert. Roles designated with higher priorities receive notifications before those in lower priorities, regardless of the order in which they are selected for inclusion within the "Alert Recipients" field.
- *Alert scenario templates* — BTRS Administrators can create templates for standard alerting scenarios to enable single-click alert activation. The template includes the alert's priority, duration, subject, and message, as well as which roles and role groups will be alerted. In addition, the administrator can designate which roles have the ability to use the template. Each template that a user has permission to use appears on the Send Alert by Role page. Templates can also be used for the new phone-based alerting functionality in this version as well. For more information, see the *User Guide*.
- *Confirm alert for users* — BTRS Administrators can now confirm alerts on behalf of users they have permission to manage on the Unconfirmed Alerts page. For example, as part of a contingency plan, users in the field may now call in to an administrator to confirm an alert if he or she is unable to confirm the alert through any other device.
- *Include agency billing codes for alert phone calls* — BTRS Administrators can assign telephone billing codes by Organizational Unit (OU) in the User Directory. For each alert sent, the billing code assigned to the sender's OU is appended to all phone numbers dialed for tracking and assigning charges as they appear on billing statements.
- *Role extract* — In addition to extracting user information through the Directory Extract, BTRS Administrators can now gather and export user data for any role the administrator can manage. The report combines the flexibility of the Directory Extract with the extended reporting capabilities of the Basic User Report to enable administrators to extract information about the users assigned to each role, directly to HTML or CSV format.
- *Password and profile update reminders* — BTRS Administrators can enable and configure proactive e-mail reminders that are automatically sent to users who have not modified their password or profile information within a designated period of time. In addition, designated BTRS Administrators receive an e-mail notification if a user's password expires.
- *Organize role groups within OUs* — BTRS Administrators can create Organizational Units (OUs) to help organize role groups within the Role Group Directory. Role groups can now be structured in the directory tree structure in the same way as users and roles, including

increased ability for editing, moving, and renaming OUs, as well as assigning managers to the OU instead of to each role group.

About This Guide

To make the learning process more efficient for you, information in this guide is presented in a format different from previous versions of BTRS. The organization of the book helps you easily gain access to what you need, and then move on with your job.

Where appropriate, this guide provides best practice examples for you to use in your BTRS portal, to help you in making decisions about setting up and administering your directories, Document Library, portal home page, and reports and logs.

Deciding Which Book to Use

We decided that the best way to organize and format the documentation was to divide the information into two books — a *User Guide* and an *Administrator Guide*. While both books provide step-by-step instructions, the focus of each is directed at accomplishing different types of tasks.

The *User Guide* is aimed at the day-to-day operations for those with BTRS Collaboration licenses working through the BTRS portal to collaborate on and post documents, and to send and receive alerts. The *User Guide* contains an overview of BTRS, provides descriptions of its functionality, and shows you how to accomplish specific tasks.

The *Administrator Guide* focuses on more advanced and technical operations, including:

- Setting up user accounts and permissions
- Managing portal content, folders, documents, and discussions
- Generating reports

Standards and Conventions Used in This Guide

This BTRS guide uses several conventions to help make accessing information easy and efficient. These conventions include:

- Standard user-friendly terminology
- Step-by-step instructions for completing processes
- Notes, tips, and cautions for using the BTRS portal
- A glossary of terms and an index for easy information lookup

Standard Terminology

This section describes both the technical and common terms used in this guide. Wherever possible, we have attempted to use familiar language that accurately reflects the functions it represents.

Microsoft® Technology Terminology

The BTRS system shares many terms with the product Microsoft® SharePoint Portal Server, as the SharePoint® product has been used to create the portal environment in which you'll be working. Although these terms may be unfamiliar to you, they represent elements of Internet browsers and windows that you likely already recognize. In addition to the following terms, please see the Glossary for additional definitions.

The following table "translates" some of the more technical terms into everyday language:

Microsoft® or technical term	Definition	What this means in BTRS
Dashboard	A page on a dashboard site. Each dashboard contains a collection of Web parts in a modular view that can be presented to users in a Web browser. Microsoft developed the term "Digital Dashboard" to reflect different areas and components of the page, similar to that of a car's dashboard.	This term is used to represent two things: • The menu of choices you can select from on the Web page to access another area of the portal. Physically, this bar appears near the top of each page in the BTRS portal. This guide also refers to the "dashboard" as the "BTRS navigation bar." • The page of the portal you are viewing or accessing, such as the *Document Library* or *Directory* dashboard. This guide also refers to this definition as "page" or "Web page."
Dashboard site	A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web part forms. The dashboard site is used to distribute information to workspace users through a Web browser.	The entire Web site or portal. This guide also refers to "dashboard site" as "portal."

Microsoft® or technical term	Definition	What this means in BTRS
Portal	A Web site considered as an entry point to other Web sites, often by being or providing access to a search engine.	Rather than representing an entry point, the entire Web site, or all the dashboards put together. The BTRS portal provides you with access to other users' contact information, important documents and news, and alerts. This guide uses "portal" as the primary term to define how BTRS functions.
Web Part	A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework.	A section of a Web page containing information organized by function or type, such the Announcements section on the home page, or document folders. This guide also refers to "Web part" as "section" or "area."
Workspace	An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.	The entire Web site or portal. This guide also refers to "workspace" as "portal."

Common Actions Terminology

This BTRS guide uses use common terms for actions and maneuvers you might perform while using BTRS. If you are new to using Microsoft® Windows® or a mouse, these terms may seem unfamiliar to you, but as you become more familiar with the Microsoft® Windows® environment, you can quickly become a skilled user.

The following table provides instructions on how to perform the most common actions.

Term	Action
Click	Point to the item you want, and then quickly press and release the left mouse button.
Expand	In the tree view, click the + (plus sign) next to the item.

Term	Action
Open	Point to the item you want, and then quickly press and release the left mouse button twice (also referred to as “double-click”).
Point	Move the mouse until the mouse pointer is positioned over (pointing to) the item you want (also referred to as “roll over”).
Right-click	Point to the item you want, and then quickly press and release the right mouse button.
Scroll	Click the scroll box in the vertical or horizontal scroll bar and drag the drag the scroll box to see different portions of the page that are not currently visible. Scrolling only changes what is displayed.
Select	Click the item you want. A selected item usually appears in a different color or with a frame around it to indicate that it is selected. To select multiple items, press **CTRL** or **SHIFT** while you click. To deselect one or more items, press **CTRL** or **SHIFT** and click the item again.

Step-by Step Instructions

Each time you need to complete an operation using BTRS, this guide provides easy-to-follow instructions to walk you through your task. Each set of instructions has a step title that describes what the task can help you do. The steps needed to perform the task are numbered in sequence.

The following table describes the different formatting conventions you might encounter when you follow the step-by-step instructions.

Formatting Convention	Description
Triangular bullet	Identifies a step-by-step instruction to complete a task. The step title occurs after the triangular bullet and the steps are listed in sequence below the step title.
SMALL CAPS	Identifies a keyboard action. Keys can be used alone, in combinations, or in sequences. For example, **CTRL + P** means to hold down the **CTRL** key while pressing **P**.
ALL CAPS	Identifies a particular URL or path name.
Bold type	Identifies the name of a BTRS button, field, list, or menu item in a step-by-step instruction.

Formatting Convention	Description
Italics type	Identifies the name of a window, page, dialog box, or form.
`Courier` type	Identifies specific text for you to type in a field or on a page.

Note, Tip, and Caution Boxes

Throughout this guide you'll find information in special boxes called Note, Tip, and Caution. Margin icons are displayed next to this information that can help make you a smarter and more effective BTRS user.

Note - This information adds to or further explains a topic, to help you become more familiar with how BTRS works.

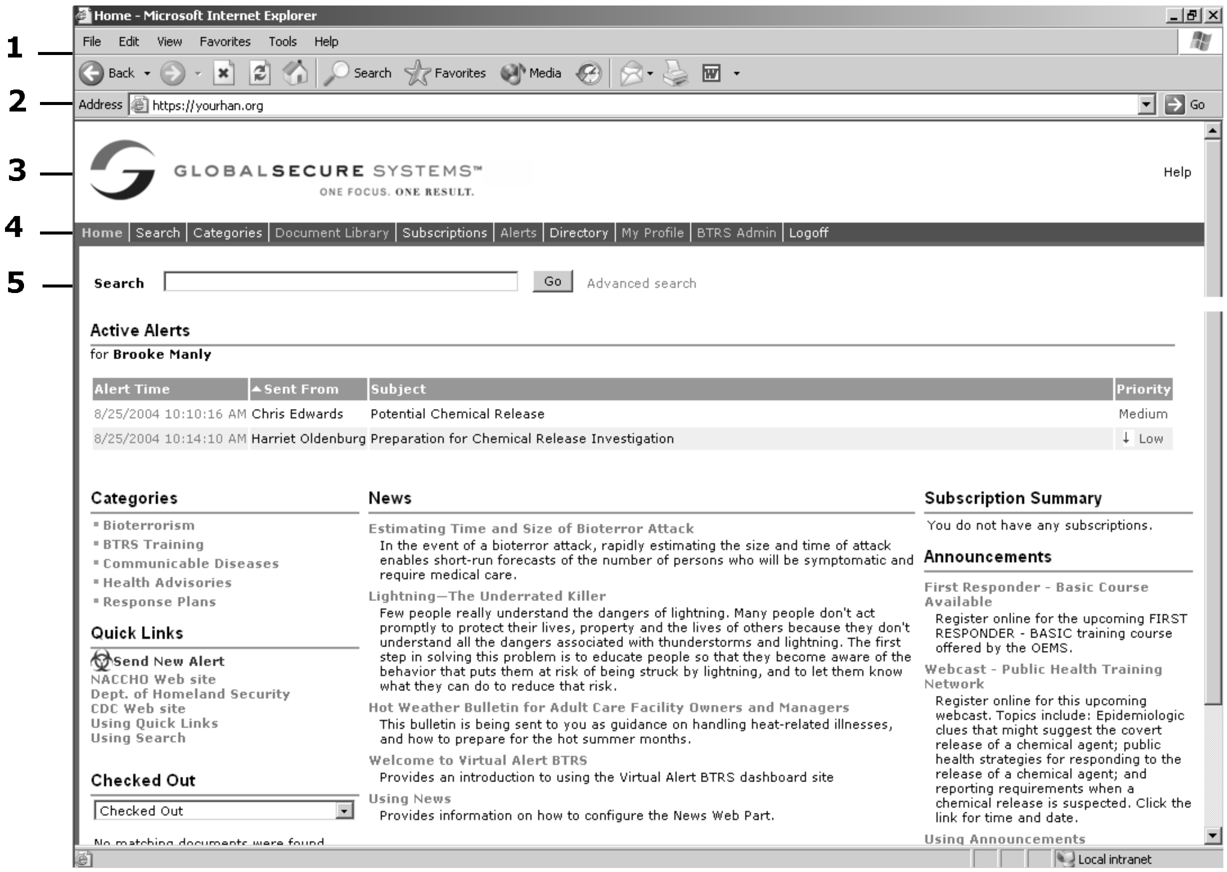
Tip - These are hints and shortcuts that can help increase your productivity as a BTRS user.

Caution - We tell you the dos and don'ts of working with BTRS to help you avoid damaging files or losing data. Often this information is essential to the completion of the task on which you are working.

Understanding Page Elements in the BTRS Portal

The BTRS system has been designed so that you can easily navigate throughout the portal. While each page in the BTRS portal contains specific information and instructions, the layout of the page remains constant so that you can become familiar with the portal in a short period of time.

This section identifies some of the elements you'll see throughout the portal, and how each functions.



Elements of the Home Page

Using this example of the BTRS portal home page, look for the following standard elements:

Number	Description
1	The browser window's Menu bar and Standard Buttons toolbar (you may choose to view any or all of Internet Explorer's toolbars). Use these menus and buttons to print pages, open and close windows, and move back and forth between Web pages.
2	The browser window's Address bar. You can type the URL of your portal here, or view a list of recently-visited pages.
3	The BTRS portal title bar. This area may display your HAN's custom logo or other graphics, and displays the name of the page you are currently viewing.
4	The BTRS navigation bar. You can click these links to visit other areas of the portal. The area you are currently viewing is displayed on the navigation bar in a different color.

Number	Description
5	The BTRS Search bar. This section enables you to search in either simple or advanced mode for items in the portal using keywords, author name, date, file name, or title.

Administering the BTRS Portal

The BTRS portal is managed by users called “BTRS Admins” who administer and oversee the daily operations of the BTRS portal. Administrators have access to areas within the portal that other users do not, and:

- Manage home page content, folders and categories
- Create and maintain user- and role-based information in the directories
- Set preferences for the entire portal

Accessing the BTRS Admin Dashboard

In order to perform administrative functions within BTRS, you must be able to access the BTRS Admin dashboard, or section, of the portal. The BTRS Admin section is only visible to those users assigned BTRS Admin licenses. In the BTRS Admin section, you can:

- Manage users, roles, and role groups
- Generate reports
- Assign folder and category permissions
- Create alert templates
- Set global preferences for alerts and reminders.

This guide primarily focuses on those tasks you can perform only if you have a BTRS Admin license.

System Requirements

Each BTRS workstation requires:

- A Microsoft Windows®-based PC running Microsoft® Windows 98 or higher, with all required service packs installed
- Microsoft® Internet Explorer 5.5 or higher, with all required service packs installed

To view documents in the Document Library, workstations must have the appropriate software applications installed. In addition, to use the discussions feature in the Document Library, each workstation must be configured properly. For more information or help with this feature, contact your System Administrator or Global Secure Systems.

Understanding License Types

Each user in the BTRS system is assigned one of three licenses that correspond to the type of work that user performs within the BTRS portal. These licenses are:

- BTRS Admin
- BTRS Collaborator
- BTRS Alerting

Administrators

The BTRS Admin license provides the most access to all sections and functionality within the BTRS portal. While each BTRS administrator may have varying management permissions, the license enables administrators to:

- Post content on the home page (based on whether or not the management right is assigned)

  For more information about assigning management rights, see “Assigning Management Rights to Roles” on page 76.

- Create, update, and view user accounts, Organizational Units (OUs), roles, and role groups (based on the OUs you are assigned to manage)

  For more information about what users, roles, OUs, and role groups are and how they function, see “Making Sense of Users, OUs, Roles, and Role Groups” on page 53. For more information about assigning OU managers, see “Assigning Managers to Role OUs” on page 67 and “Assigning Managers to User OUs” on page 99.

- Set Document Library folder access permissions and approval routing (based on the folders you are assigned administrator privileges)

  For more information about setting folder permissions, see “Working with Folder Permissions” on page 39. For more information about setting up folder approval routing, see “Working with Folder Approval Routing” on page 42.

- Create and edit Document Library categories. For more information, see “Managing Categories” on page 22.
- Create and edit alert templates. For more information, see “Creating Alert Templates” on page 29.
- Generate reports and extract user information (based on the roles and users you are assigned to manage. For more information, see “Generating Reports and Logs” on page 113.
- Set and edit user password and profile reminders. For more information, see “Managing Reminders” on page 26.

- Send, receive, resend, and cancel alerts (based on the roles you can send alerts to); and confirm alerts for users you have rights to manage. For more information about sending, receiving, resending, and canceling alerts, see the *User Guide*. For more information about assigning alertable roles, see “Assigning Alertable Roles to Roles” on page 73.

Collaborators

BTRS Collaborator licenses enable BTRS users to access and work in the Document Library, and to send and receive alerts. Collaborators, while unable to access the BTRS Admin section, can also:

- Cancel alerts they send
- Be assigned Admin-level folder permissions
- Be assigned as approvers for folders
- In the Directory, view BTRS users’:
    - Names and titles
    - Organization name and business category
    - Spoken languages
    - Assigned roles
    - Contact information (based on alertable roles)
- Add and update their own user profile information

Alerting Users

The BTRS Alerting license provides limited access to users in the HAN who need to be alerted. Alerting users, while unable to access documents on the BTRS portal, can:

- View news and announcements on the BTRS home page
- Receive and view alerts
- In the Directory, view BTRS users’:
    - Name and title
    - Organization name and business category
    - Spoken languages
    - Assigned roles
    - Contact information (work phone and e-mail address only)
- Add and update their own user profile information

2 Managing Portal Content and Settings

In addition to working with users, roles, and role groups, BTRS administrators who have other assigned rights can administer the following sections and settings:

You can manage these items	If you have this application right assigned to your role
News	Can Publish BTRS Home Page Content
Announcements	Can Publish BTRS Home Page Content
Quick Links	Can Publish BTRS Home Page Content
Alert Settings	Can Manage Alert Settings

Each of these items functions globally within the BTRS portal, including the information that appears on the BTRS home page (for all users), as well as the method in which alerts are sent to each user.

As the settings in this chapter affect all BTRS users, be sure that the role assigned these application rights coordinates the management of these duties.

Managing Home Page Content

The home page of your BTRS portal serves as a single location for your users to gather information about current happenings, view active alerts, check on the status of documents posted to the portal, and to quickly access other areas of the portal and external Web sites. By maintaining and updating your home page content, you can efficiently pass information to your users, and enable them to work productively with minimal effort.

Managing News

The News section of the BTRS home page provides you with a highly-visible area that all users, regardless of license or role permissions, view as soon as they log in. The content in the News section is governed by the **News** folder in the Document Library. All documents you post in the **News** folder appear on the home page. You can also modify the profile for each news item, including the item's description, title, and author; or delete the item when you no longer need it to appear on the home page.

Before you post items in the **News** folder, you must have permission to publish content to the BTRS portal home page. For information about assigning application rights, see "Assigning Application Rights to Roles" on page 74.

Posting News Items

Items posted in the **News** folder in the Document Library appear on the BTRS home page in the order you post them; the most recent item appears at the top of the list.

The **News** folder does not support document check in/publishing; items that you post to the folder are automatically published. By default, only the five most recently-posted articles appear on the BTRS home page, although all news items are available in the **News** folder in the Document Library. For more information about standard folders, see the *User Guide*.

To post a news item

1. On the BTRS navigation bar, click **Document Library**.

   The *Document Library* page appears.

2. Under Documents, click **Portal Content**.

   The *Document Library* page updates to reflect the folder structure.

3. Under Documents, click **News**.

   The *Document Library* page updates to reflect the folder structure.

4. Under the path of the folder, click **Add Document**.

   The *Add a document* page appears.

5. Next to the **Document file name** field, click **Browse**.

   BTRS opens the *Choose File* dialog box.

6. Navigate to and select the file you want to post as news.

7. Click **Open**.

   BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

8. Click **Continue**.

   The *Document Profile* page appears.

9 In the **Select a profile** list, select **News Item**.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, and **Description** fields.

10 In the **Title** field, type the name you want to appear as the document's title.

This information appears in bold on the home page.

11 In the **Author** field, type the name of the person who either created or is responsible for this document.

12 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document when it is posted.

13 Click **Save**.

The *Document Library* page appears and displays your document as published. The News section of the home page displays the news item at the top of the list.

Modifying News Items

After you publish a news item to the BTRS home page, you can modify the document's profile, or post an updated version of the document.

▸ To update a news item profile

The following steps assume you have navigated to **Document Library | Portal Content | News**.

1 In the **News** folder, locate the document for which you want to update the profile.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Edit Profile**.

The *Document Profile page* appears.

4 Modify the document profile as necessary.

5 Click **Save**.

The *Document Inspection* page appears and displays the updated information.

▸ To post an updated news item

1 In the **News** folder, locate the document you want to update.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Update File**.

The *Update a document* page appears.

4 Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

5 Navigate to and select the updated news file.

6 Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

7 Click **Continue**.

The *Document Profile* page appears.

8 Update the document profile as necessary.

9 Click **Save**.

The *Document Inspection* page displays the updated information.

Deleting News Items

When you no longer need to display a news item on the BTRS home page, you can delete it from the Document Library.

You must remove the document from the **News** folder to remove it from the News section of the home page. In addition, deleting documents from the **News** folder removes the item from the Document Library completely. If you want to archive the item in another folder, you need to publish the document in that folder.

To delete a news item

The following steps assume you have navigated to **Document Library | Portal Content | News**.

1 In the **News** folder, locate the document that you want to delete.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Delete**.

BTRS displays the message, “Are you sure you want to delete this document?”

4 Click **OK**.

BTRS deletes the news item from the Document Library. The news item no longer appears on the BTRS home page.

Managing Announcements

The Announcements section of the BTRS home page provides you with a highly-visible area that all users, regardless of license or role permissions, view as soon as they log in. The content in the Announcements section is governed by the **Announcements** folder in the Document Library. All documents you post in the **Announcements** folder appear on the home page. You can also modify the profile for each announcement, including the item’s description, title, and author; or delete the announcement when you no longer need it to appear on the home page.

Before you post items in the **Announcements** folder, you must have permission to publish content to the BTRS portal home page. For information about assigning application rights, see “Assigning Application Rights to Roles” on page 74.

Posting Announcements

Items posted in the **Announcements** folder in the Document Library appear on the BTRS home page in the order you post them; the most recent item appears at the top of the list.

The **Announcements** folder does not support document check in/publishing; items that you post to the folder are automatically published. For more information about standard folders, see the *User Guide*.

To post an announcement

1. On the BTRS navigation bar, click **Document Library**.

   The *Document Library* page appears.

2. Under Documents, click **Portal Content**.

   The *Document Library* page updates to reflect the folder structure.

3. Under Documents, click **Announcements**.

   The *Document Library* page updates to reflect the folder structure.

4. Under the path of the folder, click **Add Document**.

   The *Add a document* page appears.

5. Next to the **Document file name** field, click **Browse.**

   BTRS opens the *Choose file* dialog box.

6. Navigate to and select the file you want to post.

7. Click **Open**.

   BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

8. Click **Continue**.

   The *Document Profile* page appears.

9. In the **Select a profile** list, select **Announcement**.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, and **Description** fields.

10. In the **Title** field, type the name you want to appear as the document's title.

    This information appears in bold on the home page.

11. In the **Author** field, type the name of the person who either created or is responsible for this document.

12. In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

    This information displays under the name of the document when it is posted.

13 Click **Save**.

The *Document Library* page appears and displays your document as published. The Announcements section of the home page displays the announcement at the top of the list.

Modifying Announcements

After you publish an announcement to the BTRS home page, you can modify the document's profile, or post an updated version of the document.

The following steps assume you have navigated to **Document Library | Portal Content | Announcements**.

▸ To update an announcement profile

1 In the **Announcements** folder, locate the document for which you want to update the profile.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Edit Profile**.

The *Document Profile* page appears.

4 Modify the document profile as necessary.

5 Click **Save**.

The *Document Inspection* page displays the updated information.

▸ To post an updated announcement

1 In the **Announcements** folder, locate the document you want to update.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Update File**.

The *Update a document* page appears.

4 Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

5 Navigate to and select the updated announcement file.

6 Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

7 Click **Continue**.

The *Document Profile* page appears.

8 Update the document profile as necessary.

9 Click **Save**.

The *Document Inspection* page displays the updated information.

Deleting Announcements

When you no longer need to display an announcement on the BTRS home page, you can delete it from the Document Library.

You must remove the document from the **Announcements** folder to remove it from the Announcements section of the home page. In addition, deleting documents from the **Announcements** folder removes the item from the Document Library completely. If you want to archive the item in another folder, you need to publish the document in that folder.

To delete an announcement

The following steps assume you have navigated to **Document Library | Portal Content | Announcements**.

1 In the **Announcements** folder, locate the document you want to delete.

2 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Delete**.

BTRS displays the message, “Are you sure you want to delete this document?”

4 Click **OK**.

BTRS deletes the announcement from the Document Library. The announcement no longer appears on the BTRS home page.

Managing Quick Links

For more information about the types of licenses in BTRS, see “Understanding License Types” on page 10.

The Quick Links section of the BTRS home page provides users with Collaborator and BTRS Admin licenses with access to Web sites frequently accessed by your HAN. Users with Alerting licenses do not see the Quick Links section. The links in the Quick Links section are governed by the **Quick Links** folder in the Document Library. All Web addresses (URLs) you post in the **Quick Links** folder appear on the home page.

You can also update the profile for each link, including the link’s description, address, title, and categories; or delete the link when you no longer need it to appear on the home page.

Before you can post links in the **Quick Links** folder, you must have permission to publish content to the BTRS portal home page. For information about assigning application rights, see “Assigning Application Rights to Roles” on page 74.

Adding Quick Links

Items posted in the **Quick Links** folder in the Document Library appear on the BTRS home page in alphabetical order.

The **Quick Links** folder does not support document check in/publishing; items that you post to the folder are automatically published.

The following steps assume you have navigated to **Document Library | Portal Content | Quick Links**.

To add quick links

1 On the BTRS navigation bar, click **Document Library**.

The *Document Library* page appears.

2 Under Documents, click **Portal Content**.

The *Document Library* page updates to reflect the folder structure.

3 Under Documents, click **Quick Links**.

The *Document Library* page updates to reflect the folder structure.

4 Under the path of the folder, click **Add Document**.

The *Add a document* page appears.

5 Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

Even though you are posting a link, you still need to upload a document file to the Quick Links folder. Because BTRS uses the URL you enter in the **Link** field to locate the web site rather than the file you select here, you may upload any file for this process. For example, you can use a graphic or an empty Microsoft® Word document.

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6 Navigate to and select the file you want to post.

7 Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

8 Click **Continue**.

The *Document Profile* page appears.

9 In the **Select a profile** list, select **Web Link**.

10 In the **Link** field, type the complete URL of the Web site to which you want the link to go.

If you enter document properties information in Microsoft® Word, Excel, PowerPoint, and Visio, the information automatically populates the **Title**, **Author**, and **Description** fields.

11 In the **Title** field, type the name you want to appear as the title of the web site.

This information appears in bold on the home page.

12 In the **Description** field, type any comments or introductory information about this document that will help others to identify it.

This information displays under the name of the document in the **Quick Links** folder, and as a tool tip when you roll over the link on the BTRS home page.

13 In the **Categories** list, select one or more categories in which you want the link to appear.

Press **CTRL** while clicking to select more than one item. To deselect an item, press **CTRL** and click the item again.

14 Click **Save**.

The *Document Library* page displaying the Web link, and the link appears in the Quick Links section of the home page.

Modifying Quick Links

After you add a Web link to the Quick Links section of the BTRS home page, you can modify the link's profile, or post an updated version of the link's associated document.

To update a quick link profile

The following steps assume you have navigated to **Document Library | Portal Content | Quick Links.**

1 In the **Quick Links** folder, locate the link for which you want to update the profile.

2 Under the name of the link, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Edit Profile**.

The *Document Profile* page appears.

4 Modify the link's profile as necessary.

5 Click **Save**.

The *Document Inspection* page appears and displays the updated information.

To post an updated quick link

Documents posted as quick links do not open when you click the link. Instead, a browser window opens to the URL you enter in the **Link** field.

1 In the **Quick Links** folder, locate the link you want to update.

2 Under the name of the link, click **Show Actions**.

The *Document Inspection* page appears.

3 Under Actions, click **Update File**.

The *Update a document* page appears.

4 Next to the **Document file name** field, click **Browse**.

BTRS opens the *Choose file* dialog box.

5 Navigate to and select the updated link file.

6 Click **Open**.

BTRS closes the *Choose file* dialog box, and displays the document path in the Document file name field.

7 Click **Continue**.

The *Document Profile* page appears.

8 Update the document profile as necessary.

9 Click **Save**.

The *Document Inspection* page displays the updated information.

Deleting Quick Links

When you no longer need to display a link in the Quick Links section on the BTRS home page, you can delete it from the Document Library.

You must remove the link and its associated document from the **Quick Links** folder to remove it from the Quick Links section of the home page.

To delete a quick link

The following steps assume you have navigated to **Document Library | Portal Content | Quick Links.**

1. In the **Quick Links** folder, locate the link you want to delete.
2. Under the name of the link, click **Show Actions**.

   The *Document Inspection* page appears.
3. Under Actions, click **Delete**.

   BTRS displays the message, "Are you sure you want to delete this document?"
4. Click **OK**.

   BTRS deletes the link from the Document Library. The link no longer appears on the BTRS home page.

Managing Categories

In addition to folders in the Document Library, categories provide an easy method for organizing documents, so that users can quickly locate and access documents posted on your portal. When users post documents on the portal, they can select from the list of categories you create to assign to documents. Categories appear on the BTRS home page in alphabetical order.

All users assigned BTRS Admin licenses have the ability to create, edit, and delete categories.

The Document Totals Log details the number of documents assigned to each category. For more information, see "Document Totals Log" on page 130.

As you manage your Document Library, you may also want to update the categories that appear as well. BTRS enables you to modify category names, or delete those that are outdated or that are no longer used.

Adding Categories

Categories and subcategories provide an additional method for users to locate documents by topic, responsible group, or any other sorting process that enables users to efficiently access documents stored in the library. You can add categories to the BTRS portal so that users can organize documents that are posted.

The following table provides an overview of where categories and subcategories appear in the BTRS portal:

Where to look	Category	Subcategory
Categories section on the BTRS home page	X	
Categories section of the BTRS portal (dashboard)	X	X

Where to look	Category	Subcategory
In the **Categories** list on the *Document Profile* page (when you check in or publish base documents and Web links)	X	X

To add a category

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Categories**.

The *Manage Categories* page appears.

3 In the field next to the **Create New** button, type the name of the category you want to create.

4 Click **Create New**.

The *Manage Categories* page appears and displays the new subcategory. The category also appears on the BTRS home page and in the Categories section.

To create a subcategory

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Categories**.

The *Manage Categories* page appears.

3 Locate and click the name of the category to which you want to add a subcategory.

The *Manage Categories* page updates to reflect the category structure.

4 In the field next to the **Create New** button, type the name of the category you want to create.

5 Click **Create New**.

The *Manage Categories* page appears and displays the new subcategory. The category also appears in the Categories section, but not on the BTRS home page.

Modifying Categories

You can rename an existing category, as well as add a description of the category, and the name of the person responsible for the category and that person's e-mail address. Renaming a category does not affect the documents in that category; the document profile is automatically updated to reflect the new category name.

To modify a category

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Categories**.

The *Manage Categories* page appears.

3 Next to the name of the category you want to edit, click .

4 In the **Category Name** field, make any changes to the name of the category.

5 In the **Category Description** field, type a brief description of the category's purpose.

This text appears under the category name on that category's *Categories* page.

6 In the **Contact Name** field, type the name of the person responsible for managing this category.

The name of the contact appears under the category name on that category's *Categories* page.

7 In the **Contact E-mail** field, type the responsible person's e-mail address.

When you add an e-mail address for the responsible person, the contact name that appears on the *Categories* page becomes a link to send e-mail to the contact.

8 Click **Save**.

The *Manage Categories* page appears.

Deleting Categories

When you no longer need to use a category to organize your documents, you can delete it. When a category is deleted, it no longer appears on the BTRS home page, in the Categories section, or in the **Categories** list on the *Document Profile* page. Any subcategories created within the category are also deleted. In the Document Library section, the category is removed from the document profile for each document assigned to that category; the documents in the category are not deleted.

To delete a category

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Categories**.

The *Manage Categories* page appears.

3 Next to the name of the category you want to delete, click .

BTRS displays the message, "Are you sure you want to delete this category?"

4 Click **OK**.

The *Manage Categories* page updates to reflect the deleted category.

Managing Alert Settings

In addition to determining which roles or role groups a role can alert, BTRS administrators can also set customized global alerting preferences for each alert sent. These global preferences include the number of times BTRS attempts to contact each user, the number of minutes between each attempt, and whether or not BTRS will continue to send alert messages to users if the alert should expire before all users are contacted.

Before you can change the default alert settings, you must have permission to manage alert settings. For information about assigning application rights, see “Assigning Application Rights to Roles” on page 74.

To manage global alert settings

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Alert Settings**.

The *Manage Alert Settings* page appears.

3 In the **Action Upon Expiration** list, select **Continue on Expiration** if you want alert calls to be made even if an alert expires before all calls are made.

– or –

Select **Stop on Expiration** if you want alert calls to stop when an alert expires, even if all calls have not yet been made.

4 In the **Minimum Interval Between Attempts** field, enter the minimum number of minutes you want BTRS to wait between attempting calls to each user’s selected locations.

Enter a number between 1 and 15.

5 In the **Number of Attempts** field, enter the total number of attempts you want BTRS to make to each selected location.

Enter a number between 1 and 10.

6 In the **Delay before sending Telephone Notifications** field, enter the number of minutes you want BTRS to wait before initiating phone calls for sending alert notifications and faxes.

Enter a number between 0 and 60.

7 In the **Read Alert Signature** list, select **On** if you want BTRS to read the alert signature over the phone, if included.

– or –

Select **Off** if you do not want BTRS to include an alert signature in phone-based messages.

The signature will still appear in e-mail messages, faxes, and on the portal.

8 In the **Include Alert Time Sent** list, select **On** if you want BTRS to include the date and time alerts are sent in the message.

– or –

Select **Off** if you do not want this information included in any alerts.

9 In the **Call-in PIN Code** field, type the ten digit number you want all users to enter to initiate alerts over the phone.

For more information about phone-in alerts, see the *User Guide*.

10 Click **Save**.

BTRS displays the message, “Do you want to save the changes?”

11 Click **OK**.

BTRS saves the alert settings.

Managing Reminders

BTRS Administrators can set up e-mail reminders to be sent to users who have not updated the information in their profiles, or who have not changed their passwords, for a specified period of time.

Before you can change reminder settings, you must have permission to manage reminder settings. For information about assigning application rights, see “Assigning Application Rights to Roles” on page 74.

Managing Profile Reminders

Profile reminders can be sent to each BTRS user who has not updated his or her profile in the number of days you indicate on the *Manage Profile Reminders* page. An e-mail notification is sent to each user’s work e-mail address, reminding him or her to log in and update the information on the *My Profile* page.

If you choose not to set any values on this page, no profile reminders will be sent to users. Once set, reminders cannot be deactivated. For help with this feature, contact Global Secure Systems.

To manage profile reminders

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Reminders, click **Manage Profile Reminder**.

   The *Manage Profile Reminder* page appears.

3. In the **Reminder Schedule** field, type the number of days you want BTRS to wait before sending a reminder to users to update their profiles.

   Enter a number between 1 and 150.

   For example, if you want BTRS to send a reminder to users who have not updated their profiles in 30 days, type "30" in this field.

4. Click **Save**.

   BTRS displays the message, "Do you want to save the changes?"

5. Click **OK**.

   BTRS saves the settings.

Managing Password Reminders

Password reminders can be sent to each BTRS user who has not changed his or her password in the number of days you indicate on the *Manage Password Reminders* page. An e-mail notification is sent to each user's work e-mail address, reminding him or her to log in and change the password. In addition, you can designate one or more BTRS administrators to receive an e-mail notification once a user's password expires, and at the interval you specify until the password is changed (either by an administrator or by the user).

If you choose not to set any values on this page, no password reminders will be sent to users. Once set, reminders cannot be deactivated. For help with this feature, contact Global Secure Systems.

To manage password reminders

1. On the BTRS navigation bar, click **BTRS Admin**.

   The **BTRS Admin** page appears.

2. Under Manage Reminders, click **Manage Password Reminder**.

   The *Manage Password Reminder* page appears.

3. In the **Administrator Email** field, type the e-mail address of a BTRS administrator who will receive notification that users' passwords have expired, then click **Add**.

   The administrator's e-mail address appears in the list.

4. Repeat step 3 for each administrator you want to receive a notification.

To remove an administrator from the notification list, select the e-mail address, then click **Remove selection**.

5 In the **Expired Password Reminder Interval** field, type the number days you want BTRS to wait between sending notifications to administrators for each user whose password remains unchanged.

6 In the **Reminder Schedule** field, type the number of days before expiration that the user will receive a reminder to change his or her password, then click **Add**.

The number appears in the list.

7 Repeat step 6 for each day you want to add to the list.

Reminders will be sent on each day you specify, until the user updates his or her profile.

8 To sort multiple days in descending order (starting with the first reminder), select the **Sort Descending** checkbox.

To remove a day from the reminder list, select the number, then click **Remove selection**.

9 Click **Save**.

BTRS displays the message, “Do you want to save the changes?”

10 Click **OK**.

BTRS saves the settings.

Managing Alert Templates

BTRS Administrators can create alert templates that contain all the information needed to send alerts quickly. Each template includes all alert details, including which roles and/or role groups will receive the alert, as well as the names of the roles who can use the template to send alerts from the *Send Alert by Role* page.

When sending an alert using a template, a user cannot change any of the alert information you include. However, users may choose to include a custom signature that includes the user’s name, organization, and e-mail address.

Before you can create or edit alert templates, you must have permission to manage alert templates. For information about assigning application rights, see “Assigning Application Rights to Roles” on page 74.

Creating Alert Templates

If you have permission to do so, you can create templates for sending alerts that users in the roles you choose can view and select on the *Send Alert by Role* page. Each alert automatically includes all the information you enter, so users do not need to spend additional time entering message text and selecting roles and role groups to receive the alert.

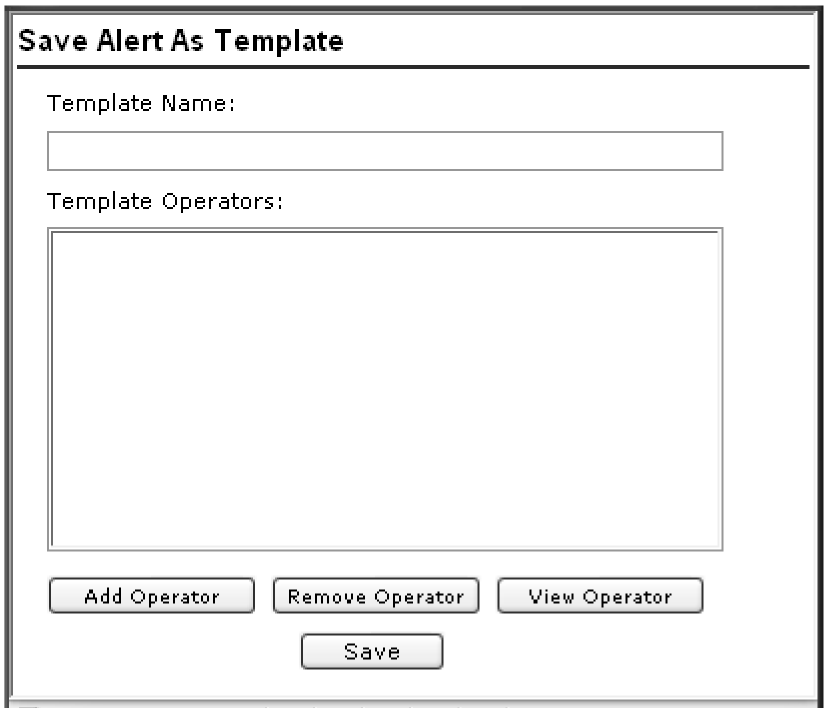
In addition, if you include the Phone In Role as an operator for the template, the template can be used for phone-based alerts. For more information about initiating alerts over the phone, see the *User Guide*.

To create an alert template from an alert

1 Follow steps 1 – 5 in To send an alert by role in the *User Guide*.

2 Click **Save as Template**.

The *Save Alert As Template* window opens.



Save Alert As Template window

3 In **Template Name**, type a name for your template.

4 Click **Add Operator**.

The *Select Roles* window opens.

5 On the **Tree** tab, expand the tree to locate the role(s) you want to assign as operator(s) to the template.

To enable users to use this template for phone-based alerts, you must select Phone In Role as an operator.

6 When you have finished selecting operators, click **OK**.

The *Select Roles* window closes, and the *Save Alert As Template* window displays the selected roles in the **Template Operators** field.

7 Click **Save**.

BTRS saves the template and updates the Alert Templates section on the *Send Alert By Role* page.

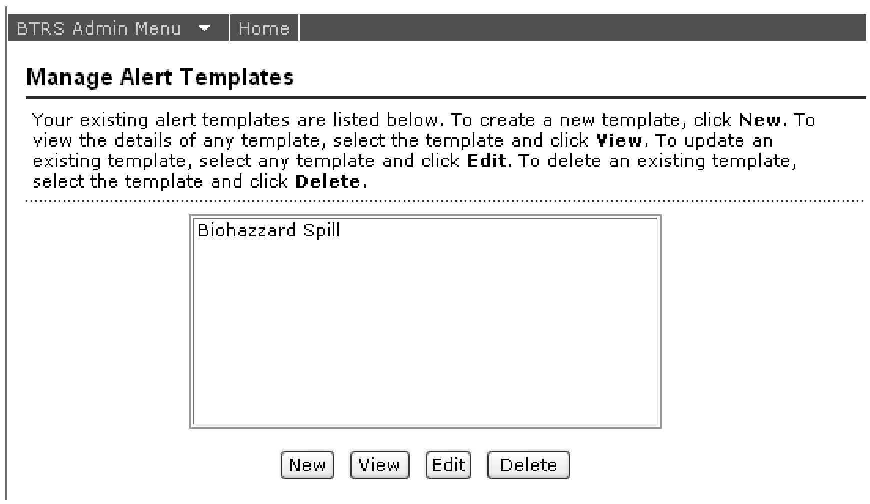
To create an alert template from BTRS Admin

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Alert Templates**.

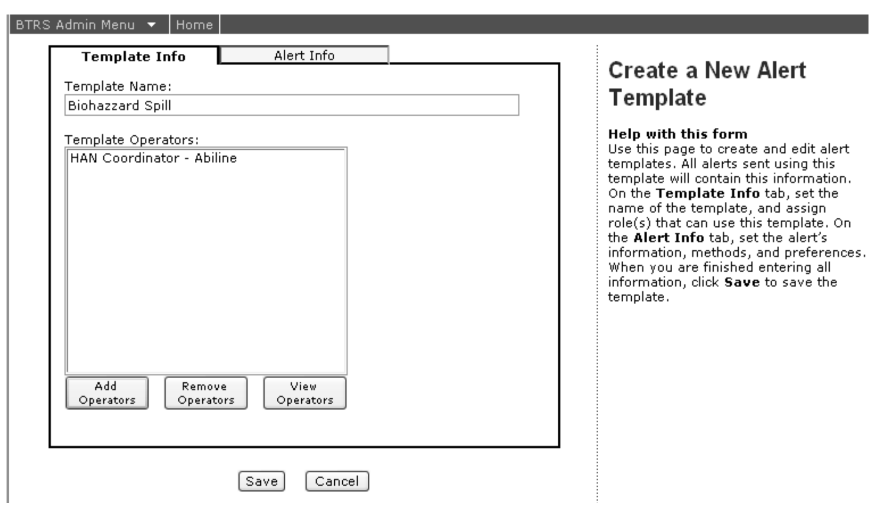
The *Manage Alert Templates* page appears.



Manage Alert Templates page

3 Click **New**.

The *Create a New Alert Template* page appears.



Create New Alert Template page - Info tab

4 On the **Template Info** tab, in the **Template Name** field, type a name for the template.

This name appears on the *Send Alert by Role* page for operators to select.

5 Under Template Operators, click **Add Operators**.

The *Select Roles* window opens.

You may also search for roles on the **Search** tab, or select from an alphabetical listing on the **List** tab.

6 On the **Tree** tab, expand the tree to locate the role(s) you want to assign as operator(s) to the template.

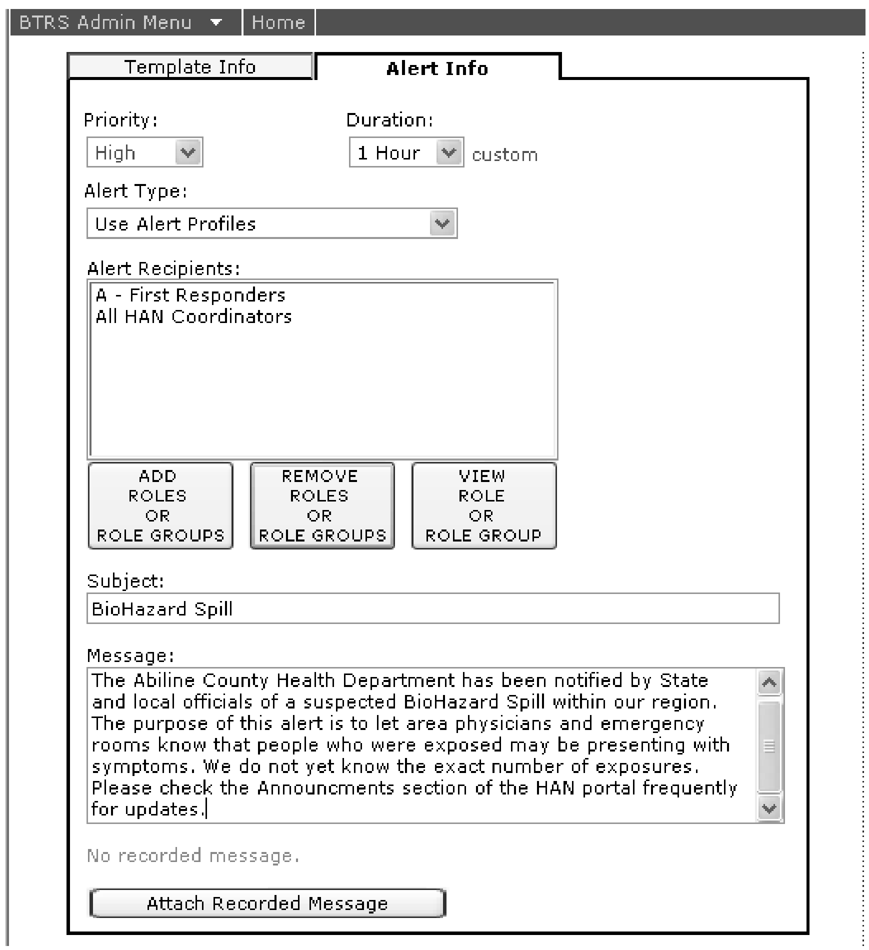
To enable users to use this template for phone-based alerts, you must select Phone In Role as an operator.

---

7 Click **OK**.

BTRS closes the *Select Roles* window, and displays the role(s) you select in the **Template Operators** list.

8 Click the **Alert Info** tab.



Create New Alert Template page - Alert Info tab

9 In the **Priority** list, select **Low**, **Medium**, or **High**.

10 In the **Duration** list, select **1 Hour**, **1 Day**, or **1 Week**.

– or –

To select a different range of time, click custom, and select the numbers or days and/or hours you want the alert to remain active.

11 In the **Alert Type** list, select one of the following methods:

Select this	To do this
Use Alert Profiles	Send an alert to each user based on his or her active alerting profile
Fax Only Alert	Send an alert to each user’s designated work fax number
Work Email Only Alert	Send an alert to each user’s work e-mail address

12 Under Alert Recipients, do one or more of the following:

Select this	To do this
ADD ROLES OR ROLE GROUPS	Open the *Select Alertable Roles* or **Select Alertable Role Groups** window and select one or more roles or role groups that will receive this alert
REMOVE ROLES OR ROLE GROUPS	Remove the selected role(s) and/or role group(s) from the **Alert Recipients** list
VIEW ROLE OR ROLE GROUP	View the role’s or role group’s profile details

13 In the **Subject** field, type the subject or title of your alert.

14 In the **Message** field, type the alert message.

You can enter up to 2,000 characters.

15 To include a pre-recorded message for phone-based notifications, click **Attach Recorded Message**.

The *Attach Recorded Message* dialog box opens.

Attach Recorded Message dialog box

16 Click **Browse** to locate the file you want to upload.

Recorded messages must be .wav files in PCM format. The default sound recorder settings for Windows will work. For help with this feature, contact your System Administrator.

Recorded messages replace the **Subject**, **Message**, and **Signature** you enter for all phone alerts. The subject, message, and signature are still included in e-mail, fax, and portal notifications.

---

17 When you are done, click **Save**.

BTRS saves the alert template.

Editing Alert Templates

You can make changes to any alert template you create, including changing the template's name, who can use template, who receives alerts sent using the template, and any of the alert details.

To edit alert templates

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Alert Templates**.

The *Manage Alert Templates* page appears.

3 Select the name of the template you want to edit, then click **Edit**.

The **Edit an Alert Template** page displays.

4 Using the steps from "Creating Alert Templates" on page 29 as a guide, make any necessary changes to the template.

5 When you are finished, click **Save**.

BTRS saves the changes.

Deleting Alert Templates

You can delete any template that you create if you no longer need to use it. Deleting the template does not affect the details of alerts already sent using that template, but does remove it from the *Send Alert by Role* page for all operators.

To delete an alert template

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Portal Content and Settings, click **Manage Alert Templates**.

   The *Manage Alert Templates* page appears.

3. Select the name of the template you want to delete, then click **Delete**.

   BTRS displays the message, “Are you sure you want to delete this template?”

4. Click **OK**.

   BTRS deletes the template from the list. The template no longer appears on the *Send Alert by User* page.

Viewing Alert Templates

You can view the details of your existing templates at any time on the *Manage Alert Templates* page.

To view alert template details

1. On the BTRS navigation bar, click **BTRS Admin**.

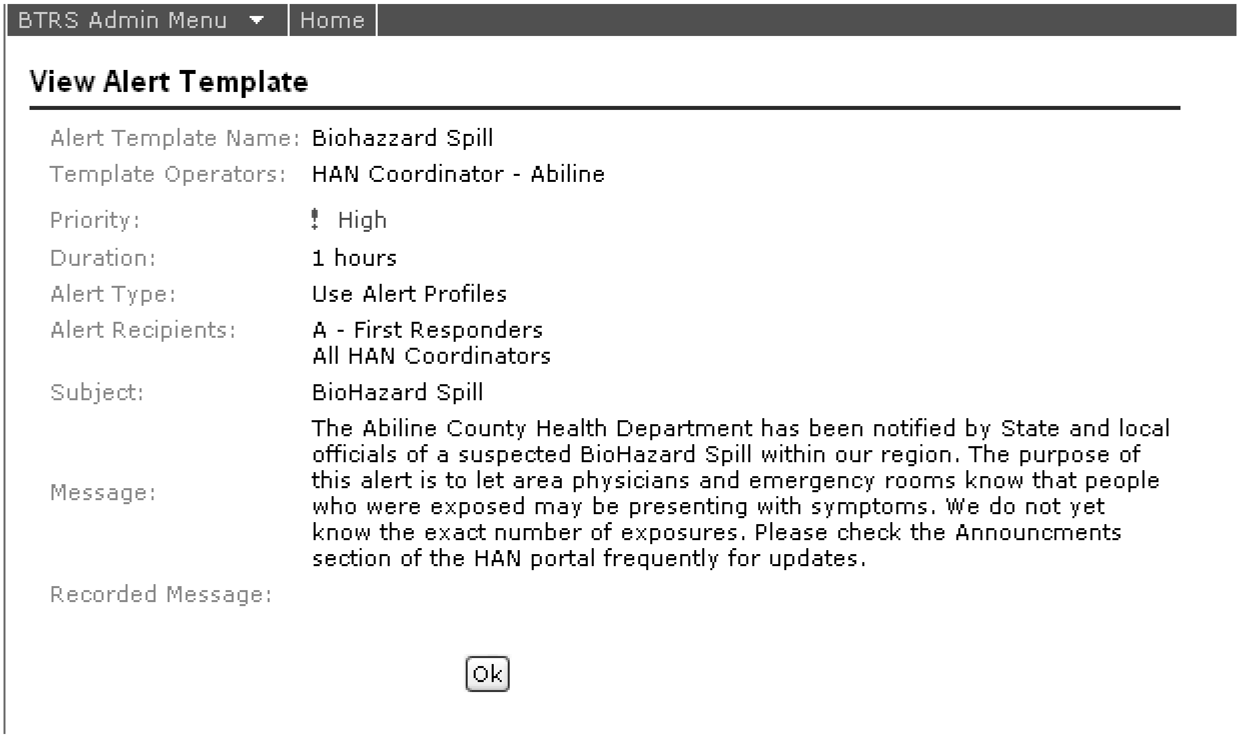
   The *BTRS Admin* page appears.

2. Under Manage Portal Content and Settings, click **Manage Alert Templates**.

   The *Manage Alert Templates* page appears.

3. Select the name of the template you want to view, then click **View**.

   The *View Alert Template* page displays the details of the template you select.



View Alert Template page

3 Managing Folders and Documents

Within the Document Library, users can create a folder directory and post documents based on the permissions they have been assigned. As an administrator, you can manage both of these elements to keep the portal working in an efficient and organized manner.

Managing Folders

The steps for creating folders are included in the *User Guide*.

Managing the folders within your Document Library can make adding and managing the documents in the library a much easier task. By assigning folder profiles, permissions, and approval routing, you can maintain control over who accesses each folder and the information within it.

You can generate the Folder Permission Report at any time to view the number of documents assigned to each folder in the Document Library. For more information, see "Folder Permission Report" on page 133.

Working with Folder Profiles

Folder profiles can provide you with a method to categorize the documents within each folder. The default document type is a base document, but you can also add Web links, news, and/or announcements profiles as well.

Adding Document Profiles to Folders

If you have permission to do so, you can determine for each folder what types of document profiles can be assigned. If necessary, you can add one or more of these profile types to a folder so that users can assign them to documents.

To add document profiles to folders

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Folders**.

The *Manage Folders* page appears.

3 In the **Choose a document folder** list, select the folder profile to which you want to add document types.

4 Select the **Set Folder Profiles** option.

5 Click **Next**.

The *Manage Folders* page displays the available document types.

6 Under All Available Document Profiles, select one or more of the following:

Select this document type	If users will create
Base document	Standard documents in the document library (can be document file, such as .doc, .xls, .pdf, .ppt, .mbd, .htm, or .txt; or graphics file, such as .bmp, .gif, or .jpg)
Web link	Links to a page of a Web site
Announcement	Base documents (see above), but without category or description options
News item	Base documents (see above), but without category or description options

7 Click **add**>>.

The document types display in the **Profiles assigned to this folder** list.

8 To change the default document type for this folder, in the **Default Profile** list, select any one of the types you are including in the folder.

9 Click **Submit**.

BTRS displays the message, “Document profiles successfully updated!”

Modifying Document Profiles in Folders

If you have permission to manage a folder, you can change what types of document profiles can be assigned to that folder. The default document type is a base document, but you can also add Web links, news, and/or announcements profiles as well.

To modify folder document profiles

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Folders**.

The *Manage Folders* page appears.

3 In the **Choose a document folder** list, select the folder profile to which you want to add document types.

4 Select the **Set Folder Profiles** option.

5 Click **Next**.

The *Manage Folders* page displays the available document types.

6 Under All Available Document Profiles, select one or more of the following:

Select this document type	If users will create
Base document	Standard documents in the document library (can be document file, such as .doc, .xls, .pdf, .ppt, .mbd, .htm, or .txt; or graphics file, such as .bmp, .gif, or .jpg)
Web link	Links to a page of a Web site
Announcement	Base documents (see above), but without category or description options
News item	Base documents (see above), but without category or description options

7 Click **add**>>.

The document types display in the **Profiles assigned to this folder** list.

– or –

To remove a document type from this folder, click **remove**.

8 To change the default document type for this folder, in the **Default Profile** list, select any one of the types you are including in the folder.

9 Click **Submit**.

BTRS displays the message, “Document profiles successfully updated!”

Working with Folder Permissions

For each folder in the Document Library that you have permission to manage, you can select which roles may view, author, and/or administer documents and subfolders within that folder.

By default, each existing folder has the following permissions established:

This user license	Has this set of permissions
BTRS Alerting	None (cannot view)
BTRS Collaboration	Author

This user license	Has this set of permissions
BTRS Admin	Admin

In addition, each folder you create in the Document Library automatically assumes the permissions of its parent folder. Consequently, if you do not set any of your own folder permissions, each folder you create in the Document Library will inherit the default permissions as described in the previous table.

For more information about the types of permissions you can assign and how each functions, see the *User Guide*.

Setting Folder Permissions

With the exception of the Document Library's three default folders (Portal Content, Documents, and Dashboard), you can establish folder permissions if you have the ability to manage that folder. You can create customized folder permissions for each folder, or apply the same permissions to a folder and all of its subfolders.

Before you can save your settings, you must assign at least one of the following as an Admin for the folder:

- Any role you are a member of
- Any role group you are a member of
- The BTRS Admin license

To set folder permissions for a folder

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Content and Settings, click **Manage Folders**.

   The *Manage Folders* page appears.

3. In the folder list, select the folder for which you want to set permissions.
4. Select the **Set Folder Permissions** option.
5. Click **Next**.

   The *Manage Folders* page displays the current permissions established for the folder.

6. For each level of permissions, click **Add** to select the roles, role groups, and/or licenses you want to assign the corresponding level of access.

   – or –

   For each level of permissions, click **Remove** to select the roles, role groups, and/or licenses you do not want to assign the corresponding level of access.

7 To apply this permission set up to all existing subfolders, select the **Apply to all subfolders** check box.

The permission scheme for this folder will automatically be inherited by any new subfolder created.

8 Click **Submit**.

BTRS displays the message, "Permissions for [folder path/folder name] successfully updated!"

Modifying Folder Permissions

With the exception of the Document Library's three default folders (Portal Content, Documents, and Dashboard), you can establish folder permissions if you have the ability to manage that folder. You can create customized folder permissions for each folder, or apply the same permissions to a folder and all of its subfolders.

Before you can save your settings, you must assign at least one of the following as an Admin for the folder:

- Any role you are a member of
- Any role group you are a member of
- The BTRS Admin license

To modify folder permissions for a folder

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* page appears.

3 In the folder list, select the folder for which you want to modify permissions.

4 Select the **Set Folder Permissions** option.

5 Click **Next**.

The *Manage Folders* page displays the current permissions established for the folder.

6 For each level of permissions, click **Add** to select the role, role group, and/or license you want to assign the corresponding level of access.

7 For each level of permissions, click **Remove** to select the role, role group, and/or license you do not want to assign the corresponding level of access.

8 To apply the new permission set up to all existing subfolders, select the **Apply to all subfolders** check box.

The approval routing scheme for this folder will automatically be inherited by any new subfolder created.

9 Click **Submit**.

BTRS displays the message, “Permissions for [folder path/folder name] successfully updated!”

Working with Folder Approval Routing

If you want each document posted to a folder to be reviewed and approved before it is published, you can select which users must give their approval first. You can choose to have one, all, or a sequence of reviewers approve the document. If any approver rejects the document, the document is automatically checked in to the Document Library so that the author can make changes.

Setting Folder Approval Routing

In addition to levels of permission assigned to each folder in the Document Library, if you have permission to manage a folder, you can establish and update approval routing for that folder.

To set folder approval routing

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* page appears.

3 In the folder list, select the folder for which you want to set approval routing.

4 Select the **Set Folder Approval Routing** option.

5 Click **Next**.

The *Manage Folders* page displays approver selection information.

6 Under the **Approvers** list, click **ADD USERS**.

BTRS opens the *Select Users* window.

7 Perform one or more of the following functions:

On this tab	Do this
Tree	In the **Organizational Unit** list, click the name of each user you want to add
Search	In the **Find User** field, type all or part of the person’s name, and click **go** In the results list, click the name of each user you want to add
List	In the alphabetical list, click the name of each user you want to add

8 When you are done, click **OK**.

BTRS closes the *Select Users* window, and displays the name of each user selected in the **Approvers** list.

9 Select one of the following options:

Select this option	To set up this routing structure
No approval required (default)	No user needs to approve documents before they are published (default)
Everyone must approve (parallel)	All persons selected must approve the document, in any order
Only one approval needed	Any one of the selected persons must approve the document
All must approve in assigned order (serial)	All persons selected must approve the document, in the order they appear in the **Approvers** list As the document is approved, only one approver at a time will see the document in the **Awaiting Your Approval** list on the home page

10 To apply the same approval routing to all existing subfolders, select the **Apply to all subfolders** check box.

11 Click **Submit**.

BTRS displays the message, “Approval routing for [folder path/folder name] successfully updated!”

Modifying Folder Approval Routing

In addition to levels of permission assigned to each folder in the Document Library, if you have permission to manage a folder, you can establish and update approval routing for that folder.

To set folder approval routing

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Content and Settings, click **Manage Folders**.

The *Manage Folders* page appears.

3 In the folder list, select the folder for which you want to modify approval routing.

4 Select the **Set Folder Approval Routing** option.

5 Click **Next**.

The *Manage Folders* page displays the current approver structure.

6 Under the **Approvers** list, click either **ADD USERS** or **REMOVE USERS**.

BTRS opens the *Select Users* window.

– or –

If you do not need to change the users in the **Approval** list, skip to step 9.

7 Perform one or more of the following functions:

On this tab	Do this
Tree	In the **Organizational Unit** list, click the name of each user you want to add or remove
Search	In the **Find User** field, type all or part of the person's name, and click **go** In the results list, click the name of each user you want to add or remove
List	In the alphabetical list, click the name of each user you want to add or remove

To view information user profile information, on the **Tree** and **Search** tabs, right-click the name of the user, and click **View User Properties**.

8 When you are done, click **OK**.

BTRS closes the *Select Users* window, and displays the name of each user selected in the **Approvers** list.

9 Select one of the following options:

Select this option	To set up this routing structure
No approval required (default)	No user needs to approve documents before they are published (default)
Everyone must approve (parallel)	All persons selected must approve the document, in any order
Only one approval needed	Any one of the selected persons must approve the document

Select this option	To set up this routing structure
All must approve in assigned order (serial)	All persons selected must approve the document, in the order they appear in the **Approvers** list As the document is approved, only one approver at a time will see the document in the **Awaiting Your Approval** list on the home page

10 To apply the same approval routing to all existing subfolders, select the **Apply to all subfolders** check box.

11 Click **Submit**.

BTRS displays the message, “Approval routing for [folder path/folder name] successfully updated!”

Managing Documents

The steps for adding documents to the portal are included in the *User Guide*.

In addition to working with folders to maintain order within your document library, you can manage down to the document level to further streamline productivity and efficiency in the Document Library section of the BTRS portal. You can keep document discussions up to date, manage approval routing and documents that have been checked out, generate reports on various aspects of the library, and create and delete subscriptions for users.

Managing Document Discussions

The steps for adding and modifying discussions in documents are included in the *User Guide*.

As users collaborate on documents posted on the BTRS portal, users can create discussion threads for each document. These discussions are stored separately from the document, so you can manage them without reviewing each document in the library.

If have a BTRS Admin license, you can delete obsolete or unnecessary discussions from documents in the library. In addition, if a document containing discussion threads is deleted from the Document Library before the discussions are deleted, you can delete the discussions so they no longer appear in the workspace.

Users can delete their own discussions from the document; however, only BTRS administrators can delete entire discussion threads in the BTRS Admin section of the portal.

To delete document discussions

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Content and Settings, click **Manage Discussions**.

The *Manage Discussions* page appears.

3 Under Documents in this workspace, locate and select the discussion you want to delete.

Discussions are listed using the folder path and name of the document in which they reside.

4 Click **Delete discussions on selected documents**.

BTRS deletes alll discussions in the document.

Managing Checked Out Documents

If a document has been checked out from the Document Library but needs to be made available to other users, and the person who checked out the document is not available to check in or publish the document, you can check the document back in if you have administrator permissions for that folder.

When you undo check out for a document, BTRS reverts to the last version of the document published or checked in to the Document Library. Any changes made to the document after check out do not appear.

To undo a checked out document

You can also access the *Document Inspection* page for checked out documents through the Documents Checked Out Log. For more information, see "Documents Checked Out Log" in Chapter 7, page 126.

1 On the BTRS navigation bar, click **Document Library**.

The *Document Library* page appears.

2 Navigate to and locate the document you want to check back in.

3 Under the name of the document, click **Show Actions**.

The *Document Inspection* page appears.

4 In the right pane, under Information, verify that the document is currently checked out.

5 Under Actions, click **Undo Check Out**.

BTRS displays the message, "Are you sure that you want to undo your check out of this document? You will lose all of the changes that you have saved on the server."

This option does not appear if you do not have permission to check the document in.

6 Click **OK**.

The *Document Inspection* page updates to reflect the last version of the document in the library.

Managing Document Approval Routing

If necessary, you can override the approval routing assigned to an individual document within a folder so that the document can be published. For example if a particular reviewer is on vacation or will be unavailable for an extended period of time, you can remove the document's approval routing if the document only needs to be reviewed and approved by that person. You have the option to either remove approval routing so that the document can be published, or you can cancel the publishing process so that the document reverts to a checked in status.

You can manage approval routing on a document-by-document basis. Overriding approval or canceling publishing for a particular document only affects that document, and not the remaining documents in the folder.

To manage document approval routing

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Reports and Logs, click **Documents Awaiting Approval Log**.

   The *Documents Awaiting Approval* page appears.

3. In the Actions column for the document you want to approve and publish, click **Override Approval**.

   BTRS displays the message, “Are you sure you want to override approval of this document? The document will be published live to the portal.”

   – or –

   To stop the document's approval routing and publishing process altogether, click **Cancel Publishing**.

   BTRS displays the message, “Are you sure you want to cancel publishing of this document? The document will revert back to a checked in state.”

4. Click **OK**.

   Your selected request is processed. A message corresponding to your selection displays.

Generating Document Reports

For more information about generating these reports and logs and what information is included in each, see Chapter 7, "Generating Reports and Logs," on page 113.

If you have permission to manage a folder, you can generate document logs and reports for each folder in the Document Library.

You can create the following logs and reports:

This log/report	Provides this information
Fax History Log	Which documents have been faxed to each role (or all roles), sorted by date/time sent or document title
Folder Permission Report	Roles and licenses assigned to each folder permission
Documents Checked Out Log	List by document title of each document checked out, its location, who checked it out, and when
Documents Awaiting Approval Log	List by document of each document currently needing approval from one or more approvers (each approver remaining is listed)
Document History Report	Lists document version history in order document was published to the portal
Document Totals Log	View number of documents within each folder, category, and/or last published by a specific user
Modified Content Report	List of each document that has been checked out/in, its location, the user who modified it, and when

Managing User Subscriptions

If you need to and if you have permission to manage other user's subscriptions, you can create and assign subscriptions to specific roles and role groups. You can also delete subscriptions for individual users.

Viewing a User's Subscriptions

If you need to, you can search for and view the subscriptions a user has created or been assigned. To search for a user and see the results of the search, you must be able to manage that user's OU, role, or role group.

To view a user's subscriptions

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Portal Content and Settings, click **Manage Subscriptions**.

   The *Manage Subscriptions* page appears.

3. In the field under **View User Subscriptions**, type the username of the individual.

4. Click **Go**.

   The *Subscriptions* page appears and displays the user's existing subscriptions.

Creating Role-based Subscriptions

You can create subscriptions to documents or folders within the Document Library, for one or more roles and/or role groups, through the *Manage Subscriptions* page. When you create a subscription, notifications are posted on the BTRS home page, and each user in the role/role group automatically is notified via e-mail as often as you choose.

To create a subscription for a role or role group

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Portal Content and Settings, click **Manage Subscriptions**.

   The *Manage Subscriptions* page appears.

3. Under Assign Subscriptions, in the **Choose a document folder** list, select the folder for which you want to create a subscription.

   – or –

   If you are creating a subscription for an individual document, select the folder in which the document is stored.

4 Click **Next**.

The *Assigning Subscriptions* form appears.

5 Under the **Roles to assign this subscription to** list, click **ADD ROLES**.

BTRS opens the *Universal Selector* window.

6 Select the role(s) and/or role group(s) you want to include in this subscription.

7 When you are done, click **OK**.

BTRS closes the *Universal Selector* window and displays the roles and role groups you select in the **Roles to assign this subscription to** list.

8 In the **Subscription Title** field, type a name for this subscription.

9 In the **Choose a document to assign subscriptions for** list, select the name of the document for which you want to create a subscription.

If the document you want is not listed in the current folder, at the top of the form under **current folder**, you can select another folder by clicking **change**.

– or –

If you want to create a subscription to the entire folder, select the **Check here to subscribe to entire folder** check box.

10 In the **How Often** list, select the how frequently you want the users in the roles/role groups you've selected to receive e-mail notifications: **When a change occurs**, **Once a day**, **Once a week**, or **Never (portal only)**.

11 Click **Submit**.

BTRS creates the subscriptions and displays the subscription details. BTRS shows a list of all users, along with the status of the subscription at the bottom of the page.

Deleting Subscriptions for Users

If necessary, you can delete a user's subscriptions, either individually or all at once.

▸ To delete a subscription

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Portal Content and Settings, click **Manage Subscriptions**.

The *Manage Subscriptions* page appears.

3 In the field under **View User Subscriptions**, type the username of the individual.

4 Click **Go**.

The *Subscriptions* page appears and displays the user’s existing subscriptions.

5 Locate the specific subscription you want to delete, and click **Delete subscription**.

BTRS displays the message, “Are you sure you want to delete this subscription?”

– or –

To delete all of the user’s subscriptions, click **Delete all subscriptions**.

BTRS displays the message, “Are you sure you want to delete all subscriptions?”

6 Click **OK**.

BTRS deletes the subscriptions.

4 Setting Up Your Directories

The BTRS application uses a combination of permissions to create a secure environment within the portal. These permissions are assigned through different types of user licenses, application rights, and Document Library permissions, which may vary from user to user.

This chapter is designed to help you become familiar with the organizational terms used in BTRS' directories, and to assist you in planning the steps of creating the role and user structures for your portal.

Making Sense of Users, OUs, Roles, and Role Groups

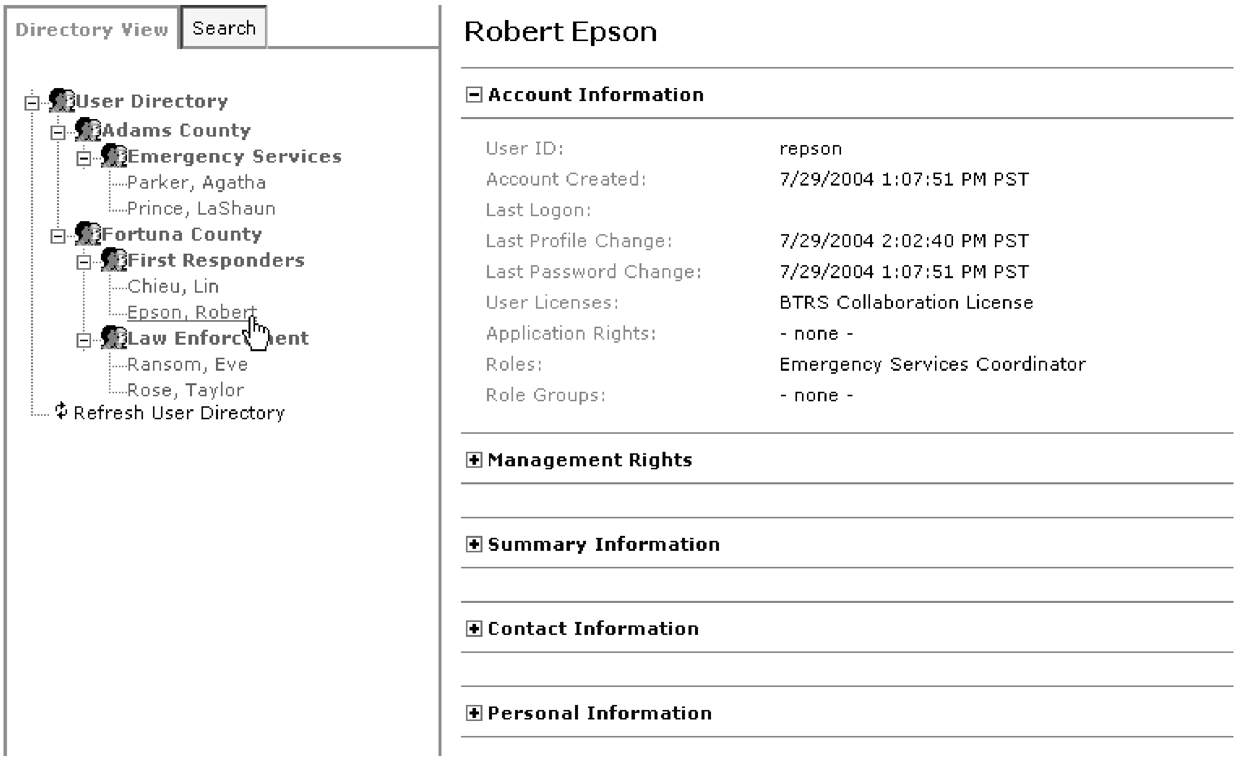
Within the BTRS directory trees, BTRS Administrators can create a network of users, roles, and role groups, based on how they use the BTRS portal, what functions each performs, and where each user works. Setting up your directories is a very important part of making sure that users can access the information they need, and so that your system operates smoothly.

To better understand how BTRS works and before you begin creating user data, take a moment to review the different elements of the directories in the BTRS Admin section, to become familiar with what each does and how each of these elements work together.

What Is a User?

A user represents one person who uses the BTRS portal. While each user may belong to more than one role or role group, the information in a user profile reflects that of one person.

Users appear in the User Directory in the BTRS Admin section. As users are the smallest unit in the user directory, they do not contain sub-elements. For more information about working with users, see "Working with Users" on page 101.

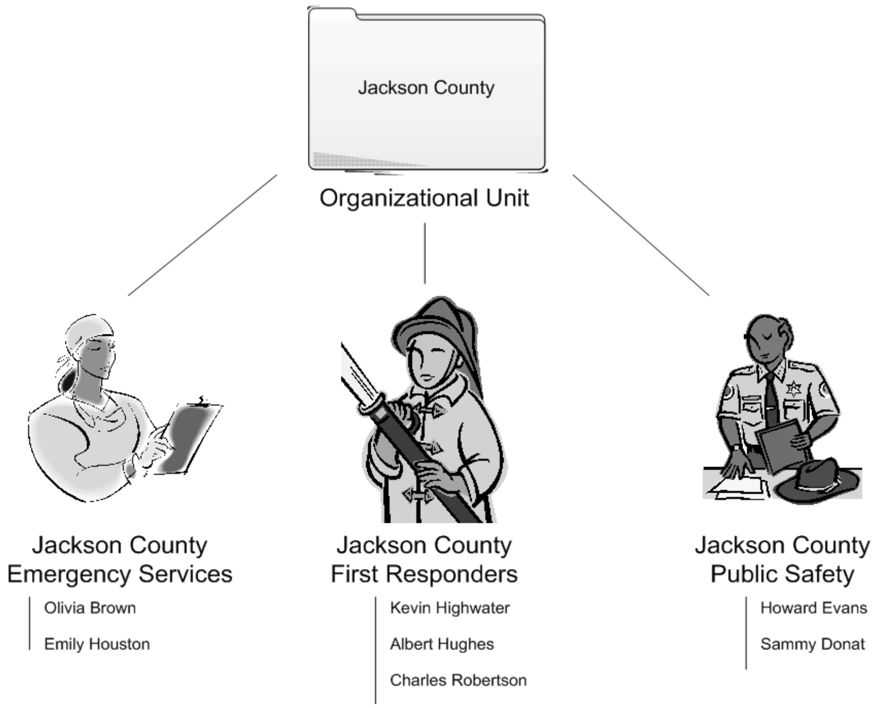


Sample User Directory tree (user profile details displayed)

What Is an OU?

An Organizational Unit (OU) contains one or more users, roles, or role groups within your BTRS network. OUs appear in the User, Role, and Role Group Directories in the BTRS Admin section. OUs might represent one or more agencies, jurisdictions, towns, counties, departments, divisions, or geographical regions; each OU can include many roles, users, or role groups who perform several functions within the framework.

For more information about working with role OUs, see “Creating Role Directory Structures” on page 60. For more information about working with user OUs, see “Creating User Directory Structures” on page 59. For more information about working with role group OUs, see “Working with Role Group OUs” on page 85.



Sample Organizational Unit Structure

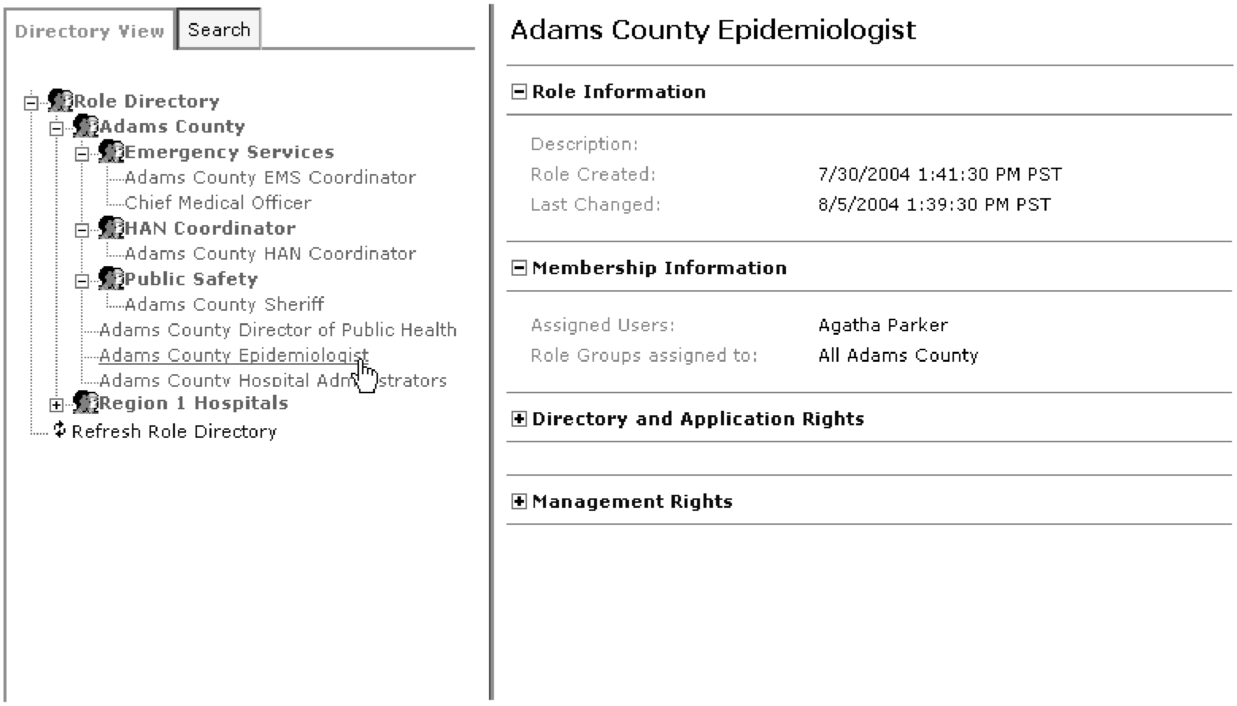
What Is a Role?

A role represents one or more people (users) who perform the function indicated by that role. For example, the Jackson County First Responders role in the previous illustration shows that Kevin Highwater, Albert Hughes, and Charles Robertson all work in the First Responder capacity in Jackson County.

Just as more than one user can be assigned to a single role, each user can perform more than one role. For example, Kevin Highwater serves as a First Responder in Jackson County, but he also works in Milltown as part of the town’s First Responder unit. He is assigned two roles: Jackson County First Responder, and Milltown First Responder.

Roles can be organized into role OU’s or grouped into role groups.

Roles appear in the Role Directory in the BTRS Admin section. For more information aboout working with roles, see “Working with Roles” on page 71.



Sample Role Directory tree displaying role profile details

What Is a Role Group?

A role group is a collection of one or more roles that perform the same function, need the same alerts, or need access to the same areas of the portal. For example, each county may have a role called “OES Public Information Officer”. To avoid having to send 32 alerts to each county’s Public Information Officer, you can create a role group called “All OES PIOs” and include the Public Information Officer role from each of the counties.

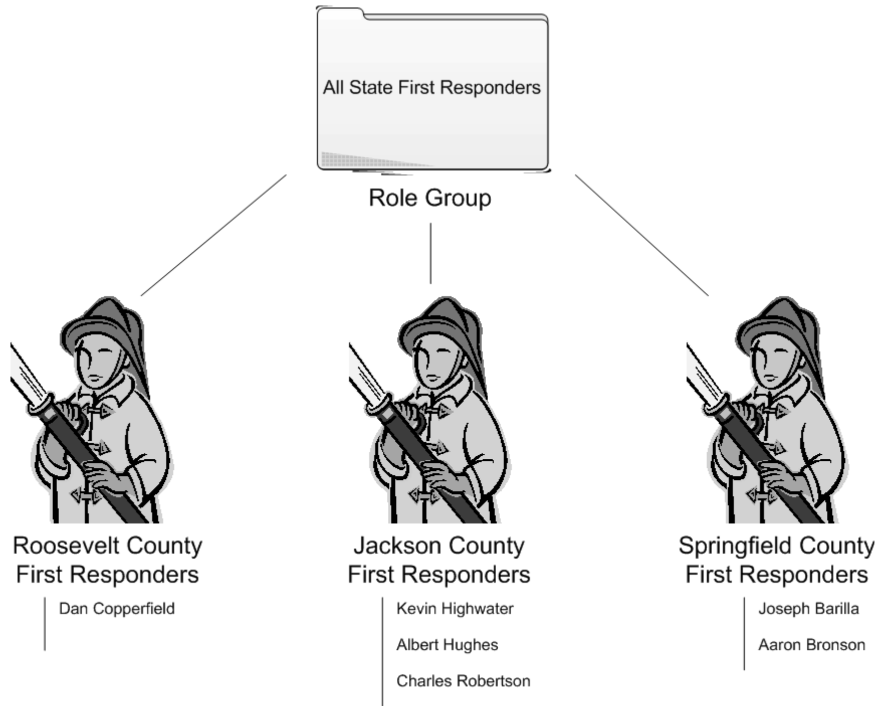
A role group can include several roles, and hence, all the users assigned to those roles. For example, if you have a role group called “First Responders”, you can include roles such as “Fire Department, “EMT Transport Services,” and “OES Public Information Officer”.

Likewise a role may be included in more than one role group. In the examples above, the Public Information Officer role appears in both the All OES PIO role group and the First Responder role group.

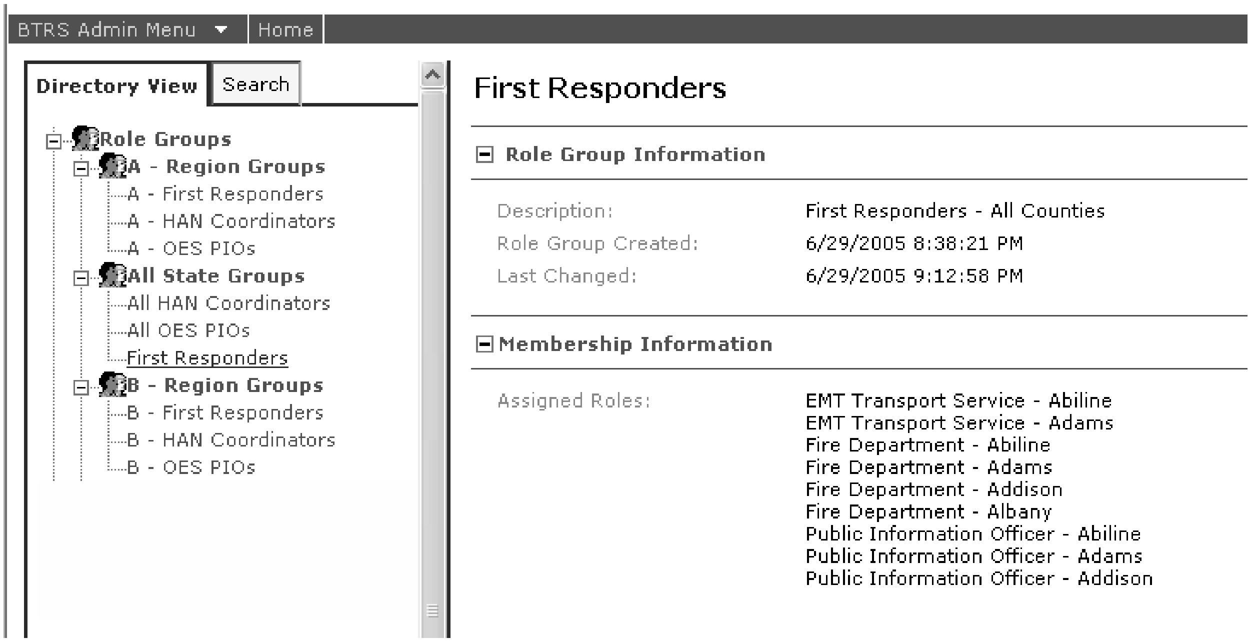
Role groups are similar to OUs, in that they provide you with a method to organize roles. However, while OUs provide organization within the BTRS system (to make maintenance and management easier), role groups collect roles by real-world location, or by function (to make alerting and working together easier).

One or more role groups may be organized within an OU in the Role Groups Directory.

Role groups appear in the Role Groups Directory in the BTRS Admin section. For more information about working with role groups, see “Working with Role Groups” on page 90.



Sample Role Group Structure



Sample Role Groups Directory tree (role group profile details displayed)

Planning Your Directory Setup

Setting up your directories can be a daunting task if you have many users and functions to include in your structure. Before you begin the process of creating each user account, use the following examples as a tool to help you determine what might be the best approach.

Determining the Order to Create Directory Data

Because BTRS is so flexible, you can create data in just about any order you like, as you can assign permissions at the user or role level. However, selecting an order to enter your data can streamline the process and eliminate extra time organizing, such as moving existing users and roles into newly-created Organizational Units.

The following provide just a few examples of the order in which you might create data. Each method enables you to easily assign role permissions to each user as you create individual accounts, or you can choose instead to assign users to roles through the Role Directory after you have created user accounts.

Example 1

1. Organizational Units in Role Directory
2. Roles in Role Directory
3. Organizational Units in User Directory
4. Users in User Directory

   Assign users to roles
5. Organizational Units in Role Groups Directory
6. Role groups in Role Group Directory

   Assign roles to role groups

Example 2

1. Organizational Units in Role Groups Directory
2. Role groups in Role Group Directory
3. Organizational Units in Role Directory
4. Roles in Role Directory

   Assign roles to role groups
5. Organizational Units in User Directory
6. Users in User Directory

   Assign users to roles

Example 3

1. Organizational Units in Role Directory

2 Organizational Units in User Directory

3 Roles in Role Directory

4 Organizational Units in Role Groups Directory

5 Role groups in Role Group Directory

Assign roles to role groups

6 Users in User Directory

Assign users to roles

Creating User Directory Structures

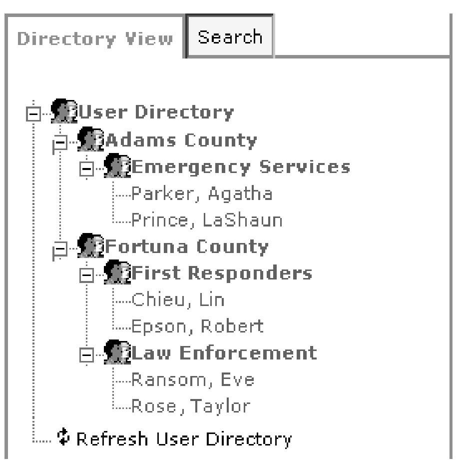
For more information about working in the User Directory, see Chapter 6, “Managing Users,” on page 95.

You can work with Organizational Units (OUs) in the BTRS Admin section in three ways: through the User Directory, the Role Directory, and the Role Group Directory. While the processes setting up and maintaining OUs in either directory are quite similar, the OUs you set up, and their corresponding functionality and purpose, may be quite different.

In the User Directory, for example, you can create two OUs called “Adams County” and “Fortuna County.” In Adams County, two users both work in the “Emergency Services” role. In Fortuna County, two users work in the “First Responders” role, and two work in the “Law Enforcement” role.

Organizational Unit (level 1)	*Adams County*	*Fortuna County*	
Organizational Unit (level 2)	Emergency Services	First Responders	Law Enforcement
Users	Agatha Parker	Lin Chieu	Taylor Rose
	LaShaun Prince	Robert Epson	Eve Ransom

This structure appears as follows in the User Directory:



Creating Role Directory Structures

For more information about working in the Role Directory, see Chapter 5, “Managing Roles and Role Groups,” on page 63.

BTRS enables you to create directory structures that are as simple or complex as you need. In addition to individual roles, each OU may contain additional “sub-OUs,” each of which contains roles.

For example, you can create OUs in the Role Directory called “Adams County” and “Region 1 Hospitals.” The Adams County OU might contain roles such as the “Adams County EMS Coordinator” and “Adams County Sheriff.” The Region 1 Hospitals OU may contain additional sub-OUs, including “Farber Hospital” and “Mercy Hospital,” and roles such as “Mercy Hospital Chief Medical Officer,” and “Pulmonary Specialist.” The following table displays this information by hierarchical level:

Organizational Unit (level 1)	*Adams County*	*Region 1 Hospitals*	
Organizational Unit (level 2)	None	Farber Hospital	Mercy Hospital
Roles	Adams County EMS Coordinator	Pulmonary Specialist	Mercy Hospital Chief Medical Officer
	Adams County Sheriff		

In the Role Directory tree, this organizational structure appears as follows:

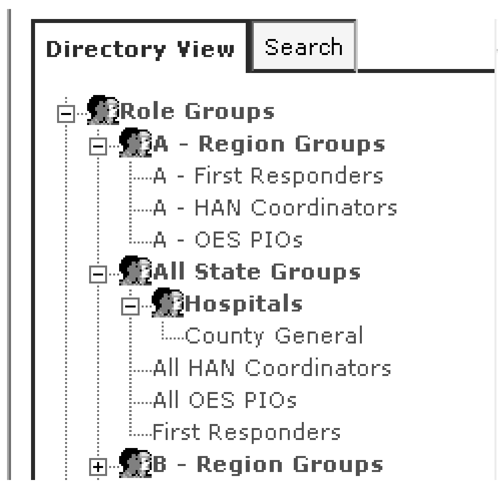
Creating Role Group Directory Structures

BTRS enables you to create directory structures that are as simple or complex as you need. In addition to individual role groups, each OU may contain additional “sub-OUs,” each of which contains role groups.

For example, you can create OUs in the Role Group Directory called “A - Region Groups” and “All State Groups,” which contain various role groups. Inside the “All State Groups” OU, you can also create a sub-OU called “Hospitals,” which contains a role group called “County General.” The following table displays this information by hierarchical level:

Organizational Unit (level 1)	*A - Region Groups*	*All State Groups*	
Organizational Unit (level 2)	None	Hospitals	None
Role Groups	A - First Responders	County General	All HAN Coordinators
	A - HAN Coordinators		All OES PIOs
	A - OES PIOs		First Responders

In the Role Group Directory tree, this organizational structure appears as follows:



5 Managing Roles and Role Groups

Roles function in BTRS to represent one or more users who perform the same function. Because the person filling a role may change as time goes on, you can easily disassociate the user from the role without having to move or delete any information in your directory.

For more information about setting up User Directory structures, see “Creating User Directory Structures” in Chapter 4, page 59.

Within the Role Directory, roles are organized into role-based Organizational Units (OUs). In the Role Groups Directory, roles are grouped into role groups, which can also be organized into OUs. Role OUs provide a method for organizing the roles within your organization, while role groups enable both BTRS Admins and end users to quickly select a single group to send alerts, or set up subscriptions or folder permissions.

For more information on roles, role groups, and OUs, see the *User Guide*.

Information presented in this chapter assumes that at least one of the roles to which you have been assigned can manage the user accounts, Organizational Units (OUs), roles, and role groups with whom you are working.

Working with Role OUs

For more information about what OUs are and what they represent, see “What Is an OU?” in Chapter 4, page 54.

You can work with Organizational Units (OUs) in the BTRS Admin section in three ways: through the User Directory, the Role Directory, and the Role Groups Directory. In the Role Directory, roles are grouped into OUs to represent geographic areas, teams, or other methods you choose. While the processes setting up and maintaining OUs in all directories are quite similar, the OUs you set up, and their corresponding functionality and purpose, may be quite different.

OUs in the Role Directory serve to help you organize all the functions that your users perform. When you set up OUs in the Role Directory, you can emulate your organization’s structure for easy maintanence, and create roles within the OUs to represent the functions people in your organization execute.

Once you have created role OUs, you can rename or move the OU if you need to do so. In addition, if you want users in particular roles to be able to view and manage OUs in the Role Directory, you can assign those roles management rights for select OUs.

You cannot delete role OUs from the Role Directory. For more information or for help with this feature, please contact Global Secure Systems.

Creating Role OUs

For more information about planning your directory setup, see "Planning Your Directory Setup" in Chapter 4, page 58.

The first step in setting up your Role Directory is to create the role OUs that will serve as the organizational backbone of the directory.

To create an OU in the Role Directory

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the Role Directory OU, and click **Create New OU**.

If you are creating an OU that will reside within another OU, right-click the name of the parent OU.

In the right pane, the *Create New OU within Role Directory* form appears.

5 In the **OU Name** field, type a name for the OU.

6 Click **Create**.

BTRS displays the message, "[name of OU] was successfully created."

7 Click **OK** to refresh the Role Directory tree.

Editing Role OU Profiles

After you create an OU, you can rename or move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the roles within them move as well.

You cannot delete role OUs from the Role Directory. If you need to delete an OU, please contact Global Secure Systems.

Renaming Role OUs

Should you need to change the name of an OU, you can update the name of the OU without affecting any sub-OUs or roles contained within it.

Do **not** rename the top-level Role OU.

To rename a role OU

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the name of the OU you want to rename, and click **Edit OU.**

In the right pane, the *Rename OU [name of OU]* form appears.

5 In the **OU Name** field, update the name of the OU.

6 Click **Save**.

BTRS displays the message, "[new OU name] was successfully updated."

7 Click **OK** to refresh the Role Directory tree.

Moving Role OUs

You can also move a single role to another location in the directory. For more information, see "Moving Roles to Different OUs" on page 66.

Should you need to, you can move an entire OU (and all of its contents) to another location in the directory.

▸ To move a role OU

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the name of the OU you want to move, and click **Move OU**.

In the right pane, the *Move OU [name of OU]* form appears.

5 Next to the Currently Selected OU field, click **SELECT OU**.

BTRS opens the *Select Role OUs* window.

6 Double-click the name of the OU that will serve as the new parent OU.

To move the OU to the highest level in the directory, select the Role Directory OU.

---

7 Click **OK**.

BTRS closes the *Select Role OUs* window, and displays the name of the OU in the **Currently Selected OU** field.

8 Click **Move**.

BTRS displays the message, "[name of OU] was successfully moved to [new location]."

9 Click **OK** to refresh the Role Directory tree.

Moving Roles to Different OUs

For more information about planning your directory setup, see “Planning Your Directory Setup” in Chapter 4, page 58.

When you create a role, it becomes part of the Role Directory structure. If you create role OUs before setting up your roles, each role is automatically “assigned” to the OU within which it resides. If you decide to create roles first, you can then move the role under its appropriate OU at a later time. Organizing your roles within OUs can help tremendously with the maintenance of your directory, and for assigning management rights to OUs in the directory.

You can also move an entire OU (including all its roles) to another location in the directory. For more information, see “Moving Role OUs” on page 65.

To move a single role to a different OU

The steps in this process assume both the OU and role that will manage it have been created. For more information about creating role OUs, see “Creating Role OUs” on page 64. For more information about creating roles, see “Creating Roles” on page 71.

1. On the BTRS navigation bar, click **BTRS Admin**.

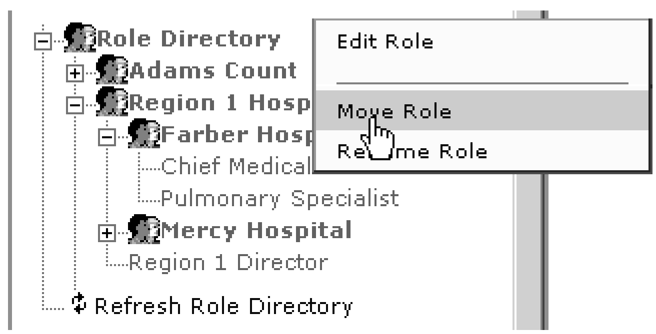
   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Manage Roles**.

   The *Manage Roles* page appears.

3. In the left pane, expand the directory tree.

4. Right-click the role you want to move, and click **Move Role**.



   In the right pane, the *Move Role [name of role]* form appears.

5. Next to the Currently Selected OU field, click **SELECT OU**.

   BTRS opens the *Select Role OUs* window.

6. On the **Tree** tab, locate and double-click the OU to which you move this role.

7. Click **OK**.

   The name of the role appears in the **Currently Selected OU** field.

8. When you are done, click **Save**.

   BTRS displays the message, “Are you sure you want to move [name of role]?”

9. Click **OK**.

   BTRS displays the message, “[name of role] was successfully moved to [name of OU].”

To move multiple roles to another OU

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Manage Roles**.

   The *Manage Roles* page appears.

3. In the left pane, expand the directory tree.

4. Right-click the OU that you want to move the roles to, and click **Move Roles to this OU**.

   In the right pane, the *Move Roles to [name of OU]* form appears.

5. Under Selected Roles, click **ADD ROLES**.

   BTRS opens the *Select Roles* window.

6. Select one or more roles you want to move to the new OU.

7. Click **OK**.

   BTRS closes the *Select Roles* window, and displays the roles in the **Selected Roles** list.

8. Click **Move**.

   BTRS displays the message, “Are you sure you want to move the selected Role(s) to [name of new OU]?”

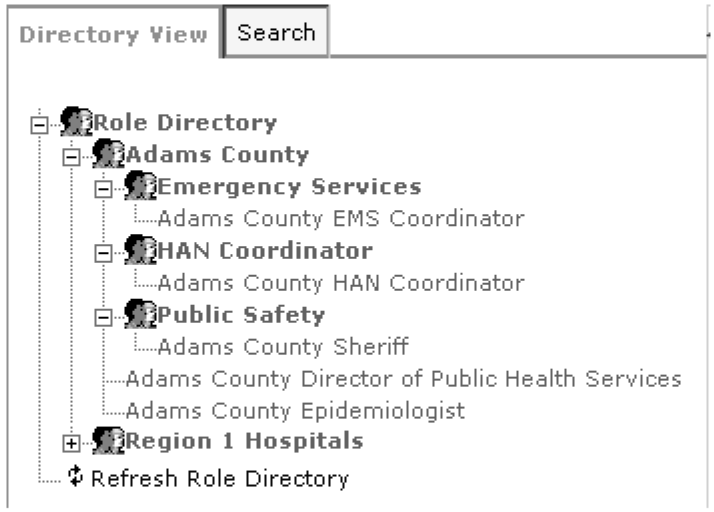
9. Click **OK**.

   A message displays, showing all roles assigned to the parent OU.

Assigning Managers to Role OUs

As you create roles and link users to those roles, you can designate one or more roles to manage role OUs in the directory. By default, roles are not given permission to view any other roles or OUs in the Role Directory. If the users in a particular role, however, need to view, change, or add roles, you can select specific OUs for that role to manage, which then become visible in the Role Directory.

For example, the BTRS Administrator can set up an OU called Adams County that contains several OUs and roles that appear as follows:



Role Directory view - Assigned to manage all available OUs and roles

In this structure, the BTRS Administrator is able to view all OUs and roles created in the Role Directory.

If the Adams County EMS Coordinator role, on the other hand, is given permission to manage only the Emergency Services OU, when the users in that role view the Role Directory, it appears as follows:

Role Directory view - Assigned to manage single OU only

You can assign managers to OUs in the Role Directory tree in two ways:

- Through the OU's profile — see "To assign OU managers by OU" on page 68
- By selecting the individual role(s) — see "To assign OU managers by role" on page 70

To assign OU managers by OU

The steps in this process assume both the role OU and role that will manage it have been created. For more information about creating role OUs, see "Creating Role OUs" on page 64. For more information about creating roles, see "Creating Roles" on page 71.

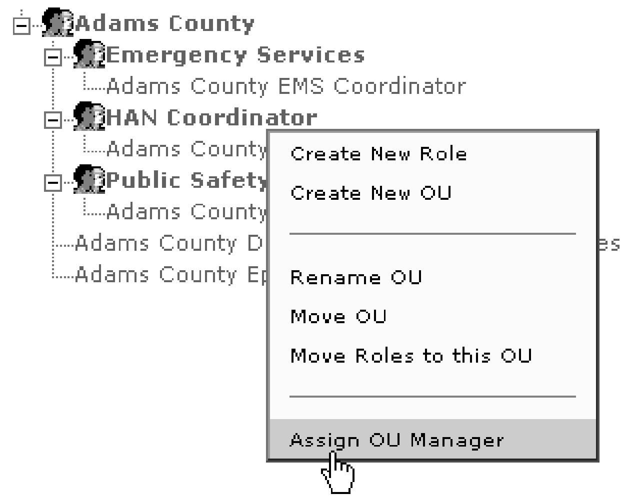
1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Manage Roles**.

   The *Manage Roles* page appears.

3. In the left pane, expand the directory tree.
4. Locate the name of the OU to which you want to assign a managing role.
5. Right-click the OU, and click **Assign OU Manager**.



In the right pane, the *Assign Managers to [name of OU]* page appears.

6 Under Current Managers, click **ADD ROLES**.

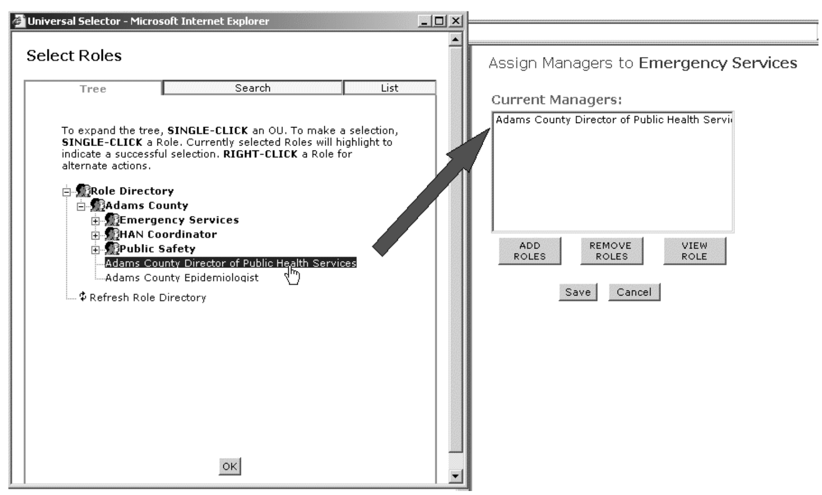
BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

7 On the **Tree** tab, locate and double-click the role(s) you want to manage this OU.

8 Click **OK**.

In the right pane, the role appears in the **Current Managers** list.



9 When you are done, click **Save**.

BTRS displays the message, “The following roles have been assigned as managers of [name of OU] [name of role].”

10 Click **OK** to refresh the Role Directory tree.

To assign OU managers by role

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* page appears.

3 In the left pane, expand the directory tree.

4 Locate the name of the role that you want to assign to manage the OU.

5 Right-click the OU, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

6 Click the **Management Rights** tab.

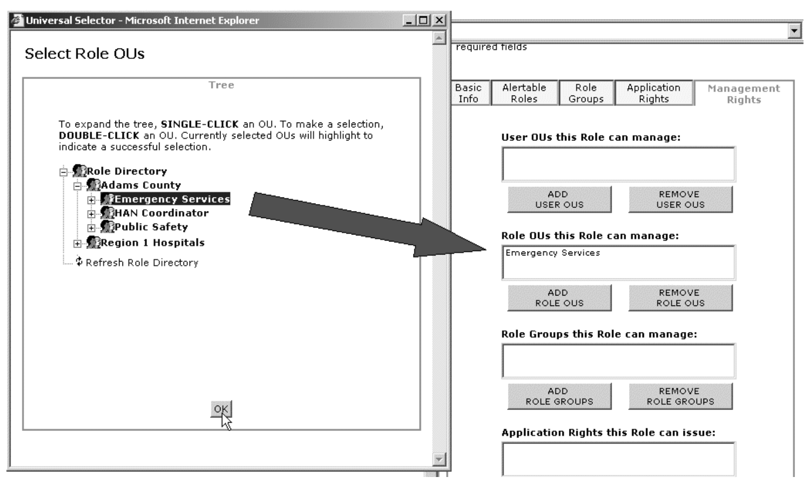
7 Under Role OUs this Role can manage, click **ADD ROLE OUS**.

BTRS opens the *Select Role OUs* window.

8 Locate and double-click the OU you want to this role to manage.

9 Click **OK**.

In the right pane, the Role OU appears in the **Role OUs this Role can manage** list.



10 When you are done, click **Save**.

BTRS displays the message, “[name of role] successfully saved.”

Working with Roles

Roles perform an integral function in BTRS, as many of the functions users can perform are based on roles and role groups. Setting up and maintaining the roles in the Role Directory is an important part of making sure BTRS users can effectively use the Document Library, access the user directories, and send and receive alerts.

BTRS enables you to create roles that contain permissions for alerting, and granting application and management rights. In addition, you can easily update which users are assigned to roles, and which role groups the role belongs to without having to move or delete objects you have already created.

You cannot delete roles from the Role Directory. For more information or for help with this feature, please contact Global Secure Systems.

Creating Roles

When you create a role, in addition to assigning one or more users to the role, you can assign several types of permissions to the role profile. These permissions include the roles and role groups to which the new role is able to send alerts, the role group(s) to which the role is assigned, and administrative application and management rights.

The steps for creating a role are divided into sections according to each tab on the *Create New Role* page:

This tab	Includes this role profile information
Basic Info	• Name and description of the role • Alert priority for the roles • Users assigned to the role
Alertable Roles	• The roles and/or role groups to which the users in this role can send alerts
Role Groups	• The role group(s) to which this role is assigned
Application Rights	Enables users in the role to do one or more of the following: • Create role groups • Assign management rights to other roles • Publish content on the BTRS home page

This tab	Includes this role profile information
Management Rights	Enables users in the role to do manage one or more of the following: • User OUs • Role OUs • Role Group OUs Also enables users in the role to do one or more of the following: • Grant application rights to other roles • Assign user licenses to other users

To access the *Create New Role* form

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Manage Roles**.

   The *Manage Roles* page appears.

3. In the left pane, on the **Directory View** tab, expand the tree to locate the OU in which you want to create the role.

4. Right-click the name of the OU, and click **Create New Role**.

   In the right pane, the *Create New Role Within [name of OU]* form appears.

5. Continue to the next section to add basic information about the role.

Assigning Users to Roles

One of the simplest yet most important elements of creating roles is naming the role so that users easily recognize it, and assigning the appropriate users to that role. Once assigned to a role, each user receives all permissions granted to that role.

One particular role that does not have specific users is the Phone In Role. By default, PhoneAlert User is assigned to this role, so that any user with appropriate permissions can generate a phone alert, using a phone alert template. For more information on phone alerts, see the *User Guide* . For more information on creating alert templates, see “Creating Alert Templates” on page 29.

To enter role information on the Basic Information tab

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* form or the *Edit Role [name of role]* form.

1. On the **Basic Information** tab, in the **Name** field, type the name of the role.

2. In the **Description** field, type a brief comment describing the purpose of the role.

3. In the **Alert Priority** list, select a priority from 10 to 1 (1 being the highest)

4 Under Users Assigned to this Role, click **ADD USERS**.

BTRS opens the *Select Users* window.

You may also search for the user on the **Search** tab, or select from an alphabetical listing on the **List** tab.

5 On the **Tree** tab, expand the tree to locate the user(s) you want to assign to the role.

You may select as many users as perform the function defined by the role.

6 Click **OK**.

BTRS closes the *Select Users* window, and displays the user(s) you select in the **Users assigned to this Role** list.

To view information about a particular user you have selected, click the name of the user, then click **View User**.

---

7 Click **Save** to save the role without alerting or management capabilities.

– or –

Continue to the next section to add roles this role can alert.

Assigning Alertable Roles to Roles

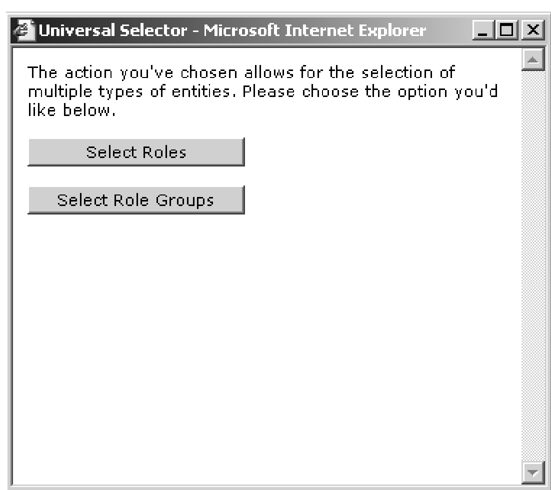
By default, roles you create do not have permission to send alerts to any other role or role group (including the role itself). Before users in a role can effectively send alerts, you must determine each role and/or role group this role will be able to choose from when sending an alert.

▸ To enter role information on the Alertable Roles tab

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* page or the *Edit Role [name of role]* page.

1 On the **Alertable Roles** tab, under This Role Can Alert, click **ADD ROLES OR ROLE GROUPS**.

BTRS opens the *Universal Selector* window.



2 Click **Select Roles** to open the *Select Roles* window.

– or –

Click **Select Role Groups** to open the *Select Role Groups* window.

3 Select the role(s) or role group(s) you want this role to be able to alert.

4 Click **OK**.

BTRS closes the *Select Roles* or the *Select Role Groups* window and displays the names of the role(s) or role group(s) in the **This Role Can Alert** list.

5 Repeat step 1 through step 4 to add role(s) or role group(s).

6 Select the **This Role Can Alert Itself** check box if you want the users in this role to be able to send alerts to all the users in this role (including themselves).

7 Click **Save** to save the role without assigning additional alerting or management capabilities.

– or –

Continue to the next section to assign this role to one or more role groups.

Assigning Roles to Role Groups

Roles groups provide another method for BTRS Admins and end users to identify and work with roles. You can assign folder permissions in the Document Library, create subscriptions, and send alerts to role groups. For more information about role groups, see “Working with Role Group OUs” on page 85.

To enter information on the Role Groups tab

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* page or the *Edit Role [name of role]* page.

1 On the **Role Groups** tab, under Role Groups this Role is a member of, click **ADD ROLE GROUPS**.

BTRS opens the *Select Role Groups* window.

2 Select one or more role groups you want this role to belong to.

3 Click **OK**.

BTRS closes the *Select Role Groups* window, and displays the name(s) of the role group(s) in the **Role Groups this Role is a member of** list.

4 Click **Save** to save the role without assigning additional management capabilities.

– or –

Continue to the next section to assign application rights to this role.

Assigning Application Rights to Roles

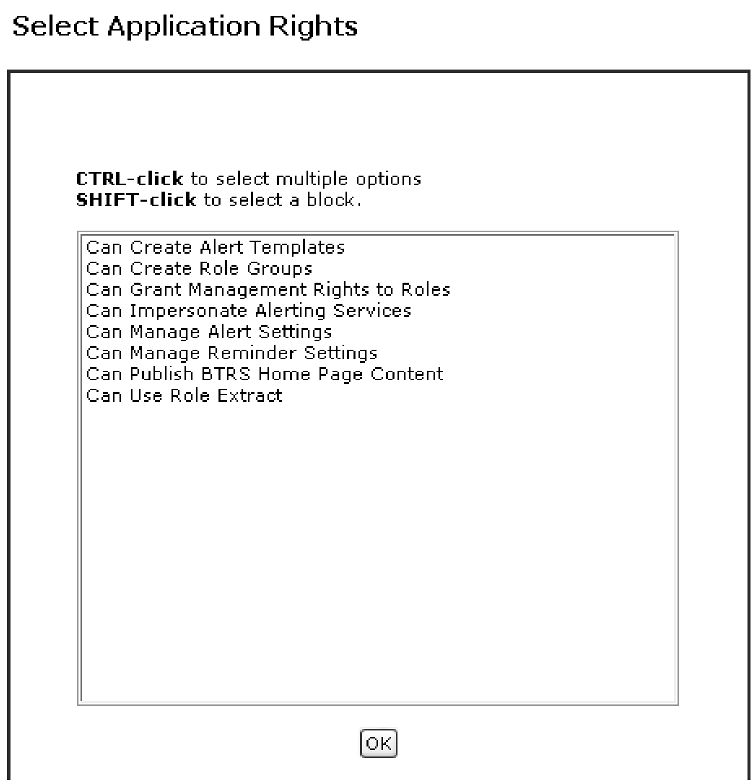
If users in a particular role need to set global alert settings, create role groups or alert templates, publish content to your BTRS home page, grant management permissions to other roles, and/or use Role Extract or another application (such as HospCap) you can assign one or more application rights to that role.

To enter role information on the Application Rights tab

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* form or the *Edit Role [name of role]* form.

1 On the **Application Rights** tab, under Application Rights granted to this Role, click **ADD APPLICATION RIGHTS**.

BTRS opens the *Select Application Rights* window.



Each of the following options only appear if your role has permission to grant these management functions.

2 Select one or more of the following:

Select this option	To enable users in this role to do this
Can Create Alert Templates	Access the *Manage Alert Templates* page to create templates for sending alerts
Can Create Role Groups	Create role groups in the Role Group Directory tree
Can Grant Management Rights to Roles	Assign management rights to other roles *This right only applies to those roles this role can manage (see next section for more information)*

Select this option	To enable users in this role to do this
Can Manage Alert Settings	Set and change default global alerting preferences
Can Manage Reminder Settings	Set reminder information for users to update profiles and passwords
Can Publish BTRS Home Page Content	Post news and announcements, and add/remove quick links (that appear on the BTRS home page)
Can Use Role Extract	Access the Role Extract page to export user information based on role

If your organization uses HospCap, you can also select one or more permission levels for accessing the application. For more information see the *HospCap Administrator Guide*.

3 Click **OK**.

BTRS closes the *Select Application Rights* window, and displays the options in the **Application Rights granted to this Role** list.

4 Click **Save** to save the role without assigning additional management capabilities.

– or –

Continue to the next section to assign management rights to this role.

Assigning Management Rights to Roles

On the **Management Rights** tab, you can grant permissions to roles for a variety of functions to enable the users in a role to:

- Manage other:
  - User OUs
  - Role OUs
  - Role Group OUs
- Grant one or more application rights to other roles
- Grant one or more management rights to other roles

To enter role information on the Management Rights tab

The following steps assume that you have navigated to either the *Create New Role within [name of OU]* form or the *Edit Role [name of role]* page.

1 On the **Management Rights** tab, under User OUs this Role can manage, click **ADD USER OUS**.

BTRS opens the *Select User OUs* window.

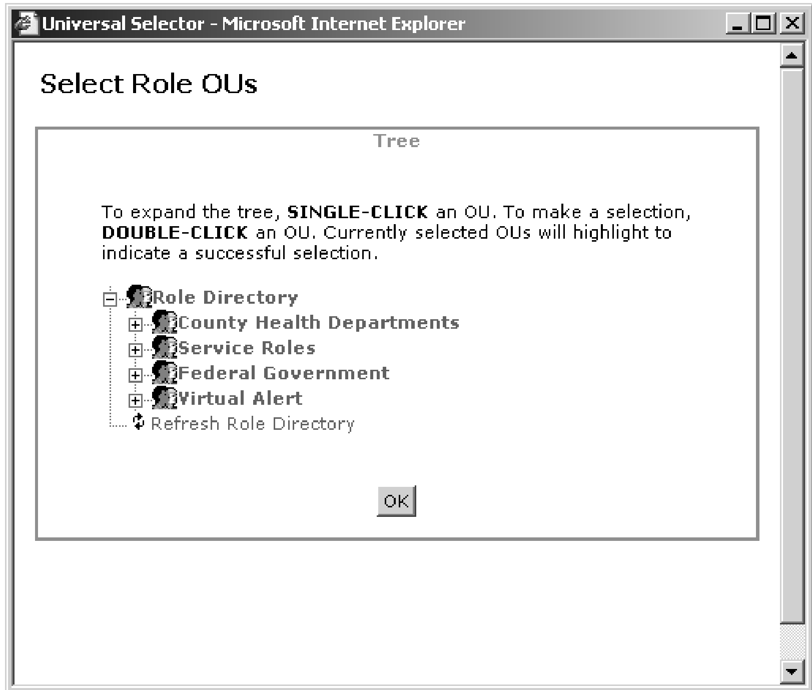
2 Double-click one or more user OUs that you want this role to manage.

3 Click **OK**.

BTRS closes the *Select User OUs* window, and displays the OUs in the **User OUs this Role can manage** list.

4 Under Role OUs this Role can manage, click **ADD ROLE OUS**.

BTRS opens the *Select Role OUs* window.



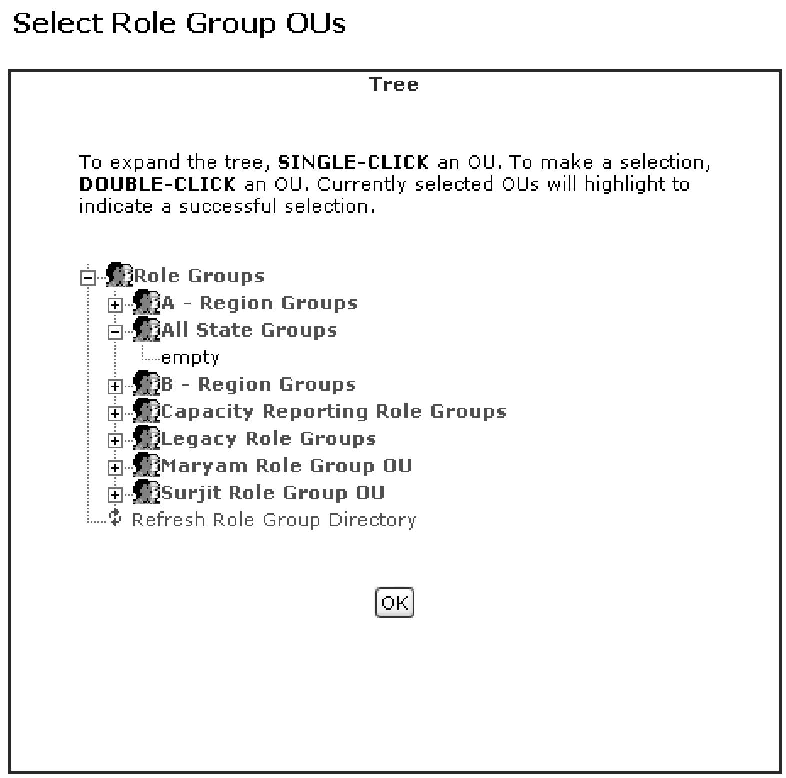
5 Double-click one or more role OUs that you want this role to manage.

6 Click **OK**.

BTRS closes the *Select Role OUs* window, and displays the OUs in the **Role OUs this Role can manage** list.

7 Under Role Group OUs this Role can manage, click **ADD ROLE GROUP OUS**.

BTRS opens the *Select Role Group OUs* window.



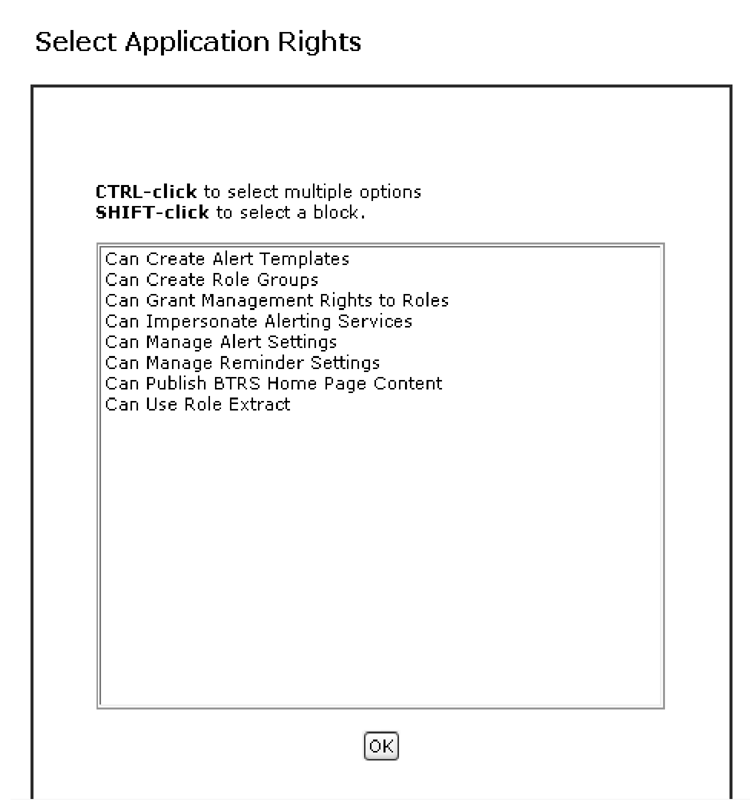
8 Select one or more role group OUs that you want this role to manage.

9 Click **OK**.

BTRS closes the *Select Role Group OUs* window, and displays the OUs in the **Role Group OUs this Role can manage** list.

10 Under Application Rights this Role can issue, click **ADD APPLICATION RIGHTS**.

BTRS opens the *Select Application Rights* window.



Only those application rights your role has permission to assign appear in the list.

11 Select one or more of the following

Select this option	To enable users in this role to do this
Can Create Alert Templates	Access the *Manage Alert Templates* page to create templates for sending alerts
Can Create Role Groups	Create role groups in the Role Group Directory tree
Can Grant Management Rights to Roles	Assign management rights to other roles *This right only applies to those roles this role can manage (see next section for more information)*
Can Manage Alert Settings	Set and change default global alerting preferences
Can Manage Reminder Settings	Set reminder information for users to update profiles and passwords
Can Publish BTRS Home Page Content	Post news and announcements, and add/remove quick links (that appear on the BTRS home page)

Select this option	To enable users in this role to do this
Can Use Role Extract	Access the Role Extract page to export user information based on role

12 Click **OK**.

BTRS closes the *Select Delegated Application Rights* window, and displays the options in the **Application Rights this Role can issue** list.

13 Under Licenses this Role can issue, click **ADD LICENSES**.

BTRS opens the *Select Delegated Licenses* window.

14 Select one or more license levels you want this role to be able to assign to new users.

15 Click **OK**.

BTRS closes the *Select Delegated Licenses* window, and displays the options in the **Licenses this Role can issue** list.

16 Click **Save**.

BTRS displays the message, "[name of role] successfully saved."

17 Click **OK** to refresh the Role Directory tree.

Editing Role Profiles

After creating a role, you can change the name of the role and the role's alert priority, as well as add or remove users. You can also update the roles and role groups to which the role can send alerts. In addition, you can change the role groups the role is assigned to, and the application and management rights the role has.

You cannot delete roles from the Role Directory. If you need to delete a role, please contact Global Secure Systems.

Renaming Roles

If you need to, you can change a role's name without affecting any of the users assigned to the role, or the role's profile information.

To rename a role

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Roles**.

The *Manage Roles* page appears.

3 In the left pane, expand the directory tree.

4 Locate and right-click the role you want to rename, and click **Rename Role**.

The *Rename [name of role]* form appears.

5 In the **New Role Name** field, update the name of the role.

6 Click **Save**.

BTRS displays the message, “[old role name] was successfully renamed to [new role name].”

7 Click **OK** to update the Role Directory tree.

Updating Basic Role Information

If you need to, you can add more users to or remove users from a role, change the role’s description, and change the role’s alerting priority.

To update basic role information

The following steps assume that you have navigated to the *Manage Roles* page.

1 On the *Manage Roles* page, in the left pane, expand the directory tree.

2 Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3 On the **Basic Info** tab, in the **Description** field, make any changes to the roles description.

4 In the **Alert Priority** list, select the alerting priority you want to assign to this role.

5 Under **Users Assigned to this Role**, do one or more of the following:

Click this	To do this
ADD USERS	Open the *Select Users* window and select one or users to add to the role
REMOVE USERS	Remove the selected user(s) from the role
VIEW USER	View the user’s profile details

6 When you are done, click **Save**.

BTRS displays the message, “[name of role] successfully saved.”

Updating Alertable Roles

If you need to, you can update which roles and/or role groups a particular role can send alerts to.

To update a role’s alertable roles

The following steps assume that you have navigated to the *Manage Roles* page.

1 On the *Manage Roles* page, in the left pane, expand the directory tree.

2 Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3 Click the **Alertable Roles** tab.

4 Under This Role Can Alert, do one or more of the following:

Click this	To do this
ADD ROLES OR ROLE GROUPS	Open the *Select Roles* or *Select Role Groups* window and select one or more roles or role groups that this role can alert
REMOVE ROLES OR ROLE GROUPS	Remove the selected role(s) and/ or role group(s) from the list that this role can alert
VIEW ROLE OR ROLE GROUP	View the role's or role group's profile details

5 When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Roles Assigned to Role Groups

If necessary, you can update the role groups to which a role is assigned.

To update the role groups this role is assigned to

The following steps assume that you have navigated to the *Manage Roles* page.

1 On the *Manage Roles* page, in the left pane, expand the directory tree.

2 Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3 Click the **Role Groups** tab.

4 Under Role Groups this Role is a member of, do one or more of the following:

Click this	To do this
ADD ROLE GROUPS	Open the *Select Role Groups* window and select one or more role groups to add this role to
REMOVE ROLE GROUPS	Remove this role from the selected role group(s)
VIEW ROLE GROUP	View the role group's profile details

5 When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Application Rights Assigned to Roles

Should you need to, you can change which application rights are granted to a particular role.

To update a role's assigned application rights

The following steps assume that you have navigated to the *Manage Roles* page.

1 On the *Manage Roles* page, in the left pane, expand the directory tree.

2 Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3 Click the **Application Rights** tab.

4 Under Application Rights granted to this Role, do one or more of the following:

Click this	To do this
ADD APPLICATION RIGHTS	Open the *Select Application Rights* window and select one or more application rights that this role can grant to other roles
REMOVE APPLICATION RIGHTS	Remove this role's permission to grant the selected application right(s) to other roles

5 When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Updating Management Rights Assigned to Roles

If a role's management requirements change, you can update which rights are assigned to that role.

To update a role's assigned application rights

The following steps assume that you have navigated to the *Manage Roles* page.

1 On the *Manage Roles* page, in the left pane, expand the directory tree.

2 Right-click the role you want to update, and click **Edit Role**.

In the right pane, the *Edit Role [name of role]* form appears.

3 Click the **Management Rights** tab.

For more information about what permissions each section provides, see "Assigning Management Rights to Roles" on page 76.

4 In each section of the form, do one or more of the following:

Click the section's	To do this
"ADD" button	Open the corresponding window and select one or more items to apply to this role
"REMOVE" button	Remove the selected item from this role's profile

5 When you are done, click **Save**.

BTRS displays the message, "[name of role] successfully saved."

Viewing Role Details

You can see how a role is configured through the Manage Roles function, including which users are assigned to the role, which roles and role groups that role can alert, which role groups to role belongs to, and the role's assigned management and application rights.

In addition, you can view any templates to which the role has been assigned as an operator. The *Assigned Alert Templates* page displays the name and template ID for each assigned template.

To view a role's details

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Manage Roles**.

   The *Manage Roles* page appears.

3. In the left pane, on the **Directory View** tab, expand the tree to locate the role you want to view.

4. Click the role's name.

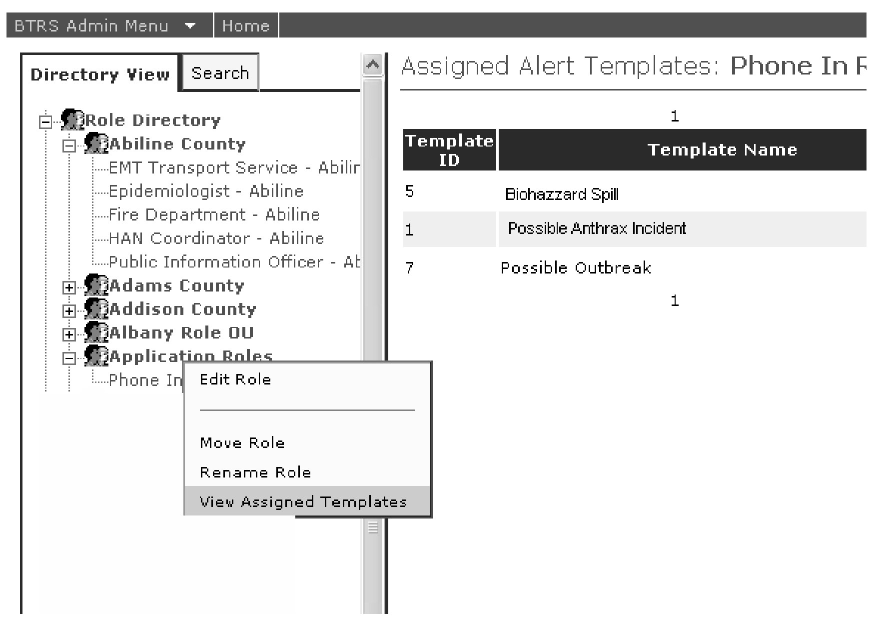
   In the right pane, the role's information displays.

To view a role's assigned templates

1. On the *Manage Roles* page, in the left pane, expand the directory tree.

2. Right-click the role for which you want to view alert templates, and click **View Assigned Templates**.

   The *Assigned Alert Templates* page displays.



Searching for Existing Roles

After you have created roles, you can search for them at any time in the Role Directory. BTRS enables you to search for roles either by entering all or part of the name of the role.

Only those roles that you have permission to manage appear in the search results.

To search for existing roles

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 In the left pane, click the **Search** tab.

Letters you enter in this field are not case sensitive.

3 In the **Search Role** field, type the search string you want to use:

For example, type this	To search for
d	All roles with words containing the letter “d”
dir	All roles with words containing the string “dir”
director	All roles with words containing the string “director”

4 Click **Search**.

BTRS searches for and displays a list of roles with names containing the search criteria you entered.

– or –

If no roles are found, BTRS displays the message “no Role found.”

5 To view a role’s profile, click the name of the role.

– or –

To edit the role’s properties, right-click the role and choose an option.

Working with Role Group OUs

For more information about what OUs are and what they represent, see “Making Sense of Users, OUs, Roles, and Role Groups” on page 53.

You can use Organizational Units (OU) to help you organize the role groups that your organization uses in the Role Groups Directory. You can create OUs to emulate your organization’s internal structure, or to reflect that of all organizations within your HAN. Role groups can also be organized within OUs based on the functions that the role groups include, such as “All Epidemiologists,” or “Jackson County First Responders.”

Once you have created role group OUs, you can rename or move the OU if you need to do so. In addition, if you want users in particular roles to be able to view and manage OUs in the Role Groups Directory, you can assign those roles management rights for select OUs.

You cannot delete role group OUs from the Role Groups Directory. For more information or for help with this feature, please contact Global Secure Systems.

Creating Role Group OUs

For more information about planning your directory setup, see "Planning Your Directory Setup" in Chapter 4, page 58

The first step in setting up your Role Groups Directory is to create the role group OUs that will serve as the organizational backbone of the directory.

To create an OU in the Role Groups Directory

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the Role Groups OU, and click **Create New OU**.

If you are creating an OU that will reside within another OU, right-click the name of the parent OU.

In the right pane, the *Create New OU within Role Groups* page appears.

5 In the **OU Name** field, type a name for the OU.

6 Click **Save**.

BTRS displays the message, "[name of OU] was successfully created".

7 Click **OK** to refresh the Role Groups Directory tree.

Editing Role Group OU Profiles

After you create an OU, you can rename or move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the role groups within them move as well.

You cannot delete role group OUs from the Role Groups Directory. If you need to delete an OU, please contact Global Secure Systems.

Renaming Role Group OUs

Should you need to change the name of an OU, you can update the name of the OU without affecting any sub-OUs or role groups contained within it.

Do **not** rename the top-level Role OU.

To rename a role group OU

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2. Under Manage Groups and Users, click **Manage Role Groups**.

   The *Manage Role Groups* page appears.

3. In the left pane, expand the directory tree.
4. Right-click the name of the OU you want to rename, and click *Edit OU*.

   In the right pane, the *Edit OU [name of OU]* page appears.

5. In the **OU Name** field, update the name of the OU.
6. Click **Save**.

   BTRS displays the message, “[new OU name] was successfully updated.”

7. Click **OK** to refresh the Role Groups Directory tree.

Moving Role Group OUs

You can also move a single role group to another location in the directory. For more information, see “Moving Role Groups to Different OUs” in Chapter 5, page 88.

Should you need to, you can move an entire OU (and all of its contents) to another location in the directory.

To move a role group OU

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2. Under Manage Groups and Users, click **Manage Roles**.

   The *Manage Roles* page appears.

3. In the left pane, expand the directory tree.
4. Right-click the name of the OU you want to move, and click **Move OU**.

   In the right pane, the *Move OU [name of OU]* page appears.

5. Next to the **Currently Selected OU** field, click **SELECT OU**.

   BTRS opens the *Select Role Groups OUs* window.

6 Double-click the name of the OU that will serve as the new parent OU.

To move the OU to the highest level in the directory, select the Role Groups OU.

---

7 Click **OK**.

BTRS closes the *Select Role Groups OUs* window, and displays the name of the OU in the **Currently Selected OU** field.

8 Click **Move**.

BTRS displays the message, “[name of OU] was successfully moved to [new location].”

9 Click **OK** to refresh the Role Groups Directory tree.

Moving Role Groups to Different OUs

For more information about planning your directory setup, see “Planning Your Directory Setup” in Chapter 4, page 58.

When you create a role group, it becomes part of the Role Groups Directory structure. If you create role group OUs before setting up your role groups, each role group is automatically “assigned” to the OU within which it resides. If you decide to create role groups first, you can then move the role group under its appropriate OU at a later time. Organizing your role groups within OUs can help tremendously with the maintenance of your directory, and for assigning management rights to OUs in the directory.

You can also move an entire OU (including all its role groups) to another location in the directory. For more information, see “Moving Role OUs” on page 65.

To move a single role group to a different OU

The steps in this process assume both the OU and role that will manage it have been created. For more information about creating role group OUs, see “Creating Role Group OUs” on page 86. For more information about creating roles, see “Creating Roles” on page 71.

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the role group you want to move, and click **Move Role Group**.

In the right pane, the *Move Role Group [name of role group]* page appears.

5 Next to the **Currently Selected OU** field, click **SELECT OU**.

BTRS opens the *Select Role Groups OUs* window.

You may also search for the OU on the **Search** tab, or select from an alphabetical listing on the **List** tab.

6 On the **Tree** tab, locate and double-click the OU to which you move this role group.

7 Click **OK**.

The name of the role group appears in the **Currently Selected OU** field.

8 When you are finished, click **Save**.

BTRS displays the message, “[name of role group] was successfully moved to [name of OU].”

To move multiple role groups to another OU

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the OU that you want to move the role groups to, and click **Move Role Groups to this OU**.

In the right pane, the *Move Role Groups to [name of OU]* page appears.

5 Under Selected Roles, click **ADD ROLE GROUPS**.

BTRS opens the Select Role Groups window.

6 Select one or more role groups you want to move to the new OU.

7 Click **OK**.

BTRS closes the *Select Role Groups* window, and displays the role groups in the **Selected Role Groups** list.

8 Click **Move**.

A message displays, showing all roles assigned to the parent OU.

Assigning Managers to Role Group OUs

As you create role groups and assign roles to those role groups, you can designate one or more roles to manage role group OUs in the directory. By default, users are not given permission to view any role groups or OUs in the Role Groups Directory. If the users in a particular role, however, need to view, change, or add role groups, you can select specific OUs for that role to manage, which then become visible in the Role Groups Directory.

▸ To assign OU managers by OU

The steps in this process assume both the OU and role that will manage it have been created. For more information about creating role group OUs, see “Creating Role Group OUs” on page 86. For more information about creating roles, see “Creating Roles” on page 71.

1 On the BTRS navigation bar, click **BTRS Admin**.

  The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Role Groups**.

  The *Manage Role Groups* page appears.

3 In the left pane, expand the directory tree.

4 Locate the name of the OU to which you want to assign a managing role.

5 Right-click the OU, and click **Assign OU Manager**.

  In the right pane, the *Assign Managers to [name of OU]* page appears.

6 Under Current Managers, click **ADD ROLES**.

  BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

7 On the **Tree** tab, locate and double-click the role(s) you want to manage this OU.

8 Click **OK**.

  In the right pane, the role appears in the **Current Managers** list.

9 When you are finished, click **Save**.

  BTRS displays the message, “The following roles have been assigned as managers of [name of OU] [name of role].”

10 Click **OK** to refresh the Role Groups Directory tree.

Working with Role Groups

Role groups provide another method of structuring the roles and users in your organization by combining one or more roles into larger groups. Users can choose to send alerts to a role group, rather than selecting all roles individually. In addition, BTRS Administrators can also create subscriptions for and assign document folder permissions by role group.

Creating Role Groups

When you create a role group, you can assign one or more roles to the role group. Each role you assign to the group can receive alerts sent to the role group. You can also create subscriptions, as well as set up folder permissions in the Document Library, based on role group.

▸ To create a role group

1 On the BTRS navigation bar, click **BTRS Admin**.

  The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Role Groups**.

  The *Manage Role Groups* page appears.

3 In the left pane, right-click Role Groups, then click **Create New Role Group**.

In the right pane, the *Create New Role Group* page appears.

4 In the **Name** field, type the name of the role group.

5 In the **Description** field, type a brief comment about the roles in this role group.

This information appears on the details page for that role group.

You can also add roles to role groups on the *Manage Roles* pages. For more information, see “Assigning Roles to Role Groups” on page 74.

---

6 Under Roles assigned to this Role Group, click **ADD ROLES**.

BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the List tab.

7 On the **Tree** tab, locate and double-click the role(s) you want to include in this role group.

8 Click **OK**.

BTRS closes the *Select Roles* window, and displays the role(s) you select in the **Roles assigned to this Role Group** list.

To view information about a particular role you have selected, click the name of the role, then click **View Role**.

---

9 Click **Save**.

BTRS displays message, “[name of role group] successfully saved.”

Editing Role Group Profiles

After creating a role group, you can change the name of the role group, as well as add or remove other roles from within the group.

You cannot delete role groups from the Role Groups Directory. If you need to delete a role group, please contact Global Secure Systems.

Renaming Role Groups

If you need to do so, you can rename a role group without disturbing any of the roles within the group.

To rename a role group

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* page appears.

3 In the left pane, expand the tree directory.

4 Right-click the name of the role group you want to rename, and click **Rename Role Group**.

In the right pane, the *Rename [name of role group]* page appears.

5 In the **New Role Group Name** field, update the current role group name.

6 Click **Save**.

BTRS displays the message, "[old role group name] was successfully renamed to [new role group name]."

7 Click **OK** to refresh the Role Group Directory tree.

Updating Roles Assigned to Role Groups

If you need to update the roles assigned to a role group, you can add or remove one or more roles.

To update the roles assigned to a role group

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Role Groups**.

The *Manage Role Groups* page appears.

3 In the left pane, expand the tree directory.

4 Right-click the name of the role group you want to rename, and click **Edit Role Group**.

In the right pane, the *Edit [name of role group]* form appears.

5 Perform one or more of the following tasks:

Click this	To do this
ADD ROLES	Open the *Select Roles* window and add one or more roles to the role group
REMOVE ROLES	Remove the role(s) from the role group
VIEW ROLE	View the role's profile details

6 When you are done, click **Save**.

BTRS displays the message, "[name of role group] successfully saved."

7 Click **OK** to refresh the Role Group Directory tree.

Viewing Role Group Details

You can see how a role group is configured through the Manage Role Groups function, including the which roles are assigned to the role group, and which role is assigned to manage the role group.

To view a role group's details

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Manage Role Groups**.

   The *Manage Role Groups* page appears.

3. In the left pane, on the **Directory View** tab, locate the role group you want to view.

4. Click the role group's name.

   In the right pane, the role group's information displays.

Searching for Existing Role Groups

After you have created role groups, you can search for them at any time in the Role Directory. BTRS enables you to search for role groups either by entering all or part of the name of the group.

Only those role groups that you have permission to manage appear in the search results.

To search for existing role groups

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. In the left pane, click the **Search** tab.

3. In the **Search Role Group** field, type the search string you want to use:

Letters you enter in this field are not case sensitive.

For example, type this	To search for
d	All role groups with words containing the letter "d"
dir	All role groups with words containing the string "dir"
director	All role groups with words containing the string "director"

4 Click **Search**.

BTRS searches for and displays a list of role groups with names containing the search criteria you entered.

– or –

If no role groups are found, BTRS displays the message “no Role Group found.”

To view a role group’s profile, click the name of the group.

6 Managing Users

Users function as the smallest element of organization in BTRS. User accounts provide information about each user with access to the BTRS portal, including that person’s contact information, job and specialty information, what type of BTRS license the user has been given, and the roles that user serves. In addition, users can create their own passwords and security codes, and alerting profiles.

For more information about setting up User Directory structures, see “Creating User Directory Structures” in Chapter 4, page 59.

In the User Directory tree, you can create user-based Organizational Units (OUs) to help organize the profiles of those people who access and use BTRS. While this structure can be created in the same way as the Role and Role Groups Directories, you can also choose to create user OUs that reflect a different framework, such as by the user’s last name, the locations the users work in, or who the users work for.

BTRS enables you as an administrator to create and maintain information in user accounts, reset password and alerting security information, and to search for and deactivate users in the user directory as necessary.

Information presented in this chapter assumes that the role to which you have been assigned can manage the user accounts, organizational units, and roles you are working with.

Working with User OUs

For more information about what OUs are and what they represent, see “What Is an OU?” in Chapter 4, page 54.

You can work with Organizational Units (OUs) in the BTRS Admin section in three ways: through the User Directory, the Role Directory, and the Role Groups Directory. In the User Directory, users are grouped into OUs, which can be based on geographic area, teams, or other methods you choose. While the processes for setting up and maintaining OUs in all directories are quite similar, the OUs you set up, and their corresponding functionality and purpose, may be quite different.

OUs in the User Directory serve to help you organize all the users in your HAN. When you set up OUs in the User Directory, you can emulate your organization’s structure for easy maintenance. In addition, you can assign telephone billing codes to each OU to help with long distance charges associated with alerts. Each alert sent will include the billing code at the end of each number dialed.

After you create an OU, you can rename or move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the users within them move as well.

You cannot delete OUs from the User Directory. If you need to delete an OU, please contact Global Secure Systems.

Creating User OUs

For more information about planning your directory setup, see "Planning Your Directory Setup" in Chapter 4, page 58.

The first step in setting up your User Directory is to create the user OUs that will serve as the organizational backbone of the directory.

To create an OU in the User Directory

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the User Directory OU, and click **Create New OU**.

If you are creating an OU that will reside within another OU, right-click the name of the parent OU.

In the right pane, the *Create New OU within User Directory* page appears.

5 In the **New OU Name** field, type a name for the OU.

This field does not display if this feature is not enabled. For more information or for help with this feature, contact Global Secure Systems.

6 In the **Billing Code for OU** field, type the billing code number that will be applied to each alert telephone notification for all users in this OU.

This is an optional value. You can enter up to 20 digits.

7 Click **Create**.

BTRS displays the message, "[name of OU] was successfully created."

8 Click **OK**.

The directory tree refreshes. When you expand the tree, the new OU appears.

Editing User OU Profiles

After you create an OU, you can rename it, change the OU's billing code, and reset the billing code for all sub-OUs; you can also move the OU to another location in the tree. When you move an OU to another location, all sub-OUs and the roles within them move as well.

You cannot delete user OUs from the User Directory. If you need to delete an OU, please contact Global Secure Systems.

Renaming User OUs

Should you need to change the name of an OU, you can update the name of the OU without affecting any sub-OUs or users contained within it. You can also change the OU's billing code, or that of all sub-OUs.

Do **not** rename the top-level Role OU.

To rename a user OU

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the name of the OU you want to rename, and click **Edit OU**.

In the right pane, the *Edit OU [name of OU]* page appears.

5 In the **OU Name** field, type the new name of the OU.

This field does not display if this feature is not enabled. For more information or help with this feature, contact Global Secure Systems.

6 In the **Billing Code for OU** field, type the billing code number that will be applied to each alert telephone notification for all users in this OU.

This is an optional value. You can enter up to 20 digits.

7 If you want the billing code from step 6 to apply to all sub-OUs, select the **Reset Billing Code of all Sub OUs** checkbox.

New sub-OUs will automatically inherit this billing code, but that can be changed if necessary.

8 Click **Save**.

BTRS displays the message, "[old OU name] successfully renamed to [new OU name]."

9 Click **OK**.

Moving User OUs

You can also move a single user to another location in the directory. For more information, see "Moving Users to Different OUs" on page 98.

Should you need to, you can move an entire OU (and all of its contents) to another location in the directory.

To move a user OU

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

You can also access BTRS Admin menu functions from the BTRS Admin submenu.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the name of the OU you want to move, and click **Move OU**.

   In the right pane, the *Move OU [name of OU]* form appears.

5 Next to the **Currently Selected OU** field, click **SELECT OU**.

   BTRS opens the *Select User OUs* window.

6 Double-click the name of the OU that will serve as the new parent OU.

To move the OU to the highest level in the directory, select the User Directory OU.

---

7 Click **OK**.

   BTRS closes the *Select User OUs* window, and displays the name of the OU in the **Currently Selected OU** field.

8 Click **Move**.

   BTRS displays the message, “[name of OU] was successfully moved to [new location].”

9 Click **OK** to refresh the User Directory tree.

Moving Users to Different OUs

For more information about planning your directory setup, see “Planning Your Directory Setup” in Chapter 4, page 58.

When you create a user account, it becomes part of the User Directory structure. If you create user OUs before setting up your user account, each user is automatically “assigned” to the OU within which it resides. If you decide to create users first, you can then move the user to its appropriate OU at a later time. Organizing your users within OUs can help tremendously with the maintenance of your directory, and for assigning management rights to OUs in the directory.

You can also move an entire OU (including all its users) to another location in the directory. For more information, see “Moving User OUs” on page 97.

To move a single user to a different OU

The steps in this process assume both the user and OU have been created. For more information about creating user OUs, see “Creating User OUs” on page 96. For more information about creating user, see “Creating Users” on page 101.

1 On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

   The *Manage Users* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the user you want to move, and click **Move User**.

   In the right pane, the *Move [name of user]* page appears.

5 Next to the **Currently Selected OU** field, click **SELECT OU**.

   BTRS opens the *Select User OUs* window.

6 On the **Tree** tab, locate and double-click the OU to which you move this user.

7 Click **OK**.

The name of the user appears in the **Currently Selected OU** field.

8 When you are done, click **Move**.

BTRS displays the message, “Are you sure you want to move [name of user] to [name of OU]?”

9 Click **OK**.

BTRS displays the message, “[name of user] was successfully moved to [name of OU].”

To move multiple users to another OU

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, expand the directory tree.

4 Right-click the OU that you want to move the users to, and click **Move Users to This OU**.

In the right pane, the *Move Users to [name of OU]* page appears.

5 Under Selected Users, click **ADD USERS**.

BTRS opens the *Select Users* window.

You can also search for users on the **Search** tab, or select from an alphabetical listing on the **List** tab.

6 On the **Tree** tab, select one or more users you want to move to the new OU.

7 Click **OK**.

BTRS closes the *Select Users* window, and displays the users in the **Selected Users** list.

8 Click **Move**.

BTRS displays the message, “Are you sure you want to move the selected User(s) to [name of new OU]?”

9 Click **OK**.

A message displays, showing all users assigned to the parent OU.

Assigning Managers to User OUs

As you create OUs and users within those OUs, you can designate one or more roles to manage OUs in the User Directory. By default, users are not given permission to view any other users or OUs in the User Directory. If the users in a particular role, however, need to view, change, or add User Directory information, you can select specific OUs for that role to manage, which then become visible in the User Directory.

Before users can view the OUs they are assigned to manage, you must assign each user to the role managing the OU.

You can assign managers to OUs in the User Directory tree by selecting the user OU the role will manage.

To assign user OU managers

The steps in this process assume both the user OU and role that will manage it have been created. For more information about creating user OUs, see “Creating User OUs” on page 96. For more information about creating roles, see “Creating Roles” in Chapter 5, page 71.

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, expand the directory tree.

4 Locate the name of the OU to which you want to assign a managing role.

5 Right-click the OU, and click **Assign OU Managers**.

In the right pane, the *Assign Managers to [name of OU]* page appears.

6 Under Current Managers, click **ADD ROLES**.

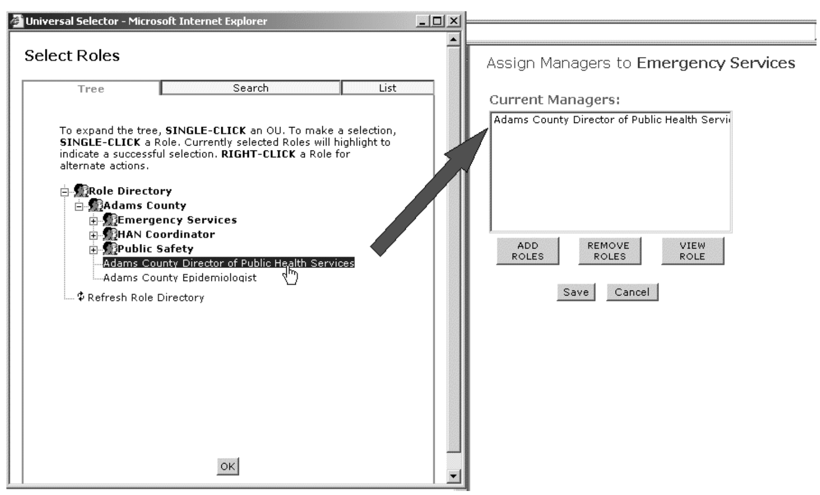
BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

7 On the **Tree** tab, locate and double-click the role(s) you want to manage this OU.

8 Click **OK**.

In the right pane, the role appears in the **Current Managers** list.



9 When you are done, click **Save**.

BTRS displays the message, “The following roles have been assigned as managers of [name of OU]: [name of role].”

10 Click **OK** to refresh the User Directory tree.

Working with Users

Within the User Directory, you can create new and work with existing user profiles, assigning users to roles and OUs. BTRS administrators can reset users' passwords and alerting security codes, and modify user profiles. In addition, administrators can deactivate users who no longer need access to the BTRS portal, and confirm alerts for users.

Creating Users

When you create a BTRS user, you set up the initial profile for that user, including the user's username and password, and the type of license that user will have. Each user belongs to a specific OU. You can choose also to assign each user to a role when you create the account, or assign users to roles through the Manage Roles function. In addition, you can enter the user's contact information, or allow the user to enter this information the first time he or she logs in to the BTRS portal.

For information about creating user OUs, see "Creating User OUs" on page 96; for information about creating roles, see "Creating Roles" on page 71.

Before you create user accounts, Global Secure Systems recommends that you create the OU structure for your user directory. Doing so enables you to create users within the appropriate OU and assign roles, and save you from having to move the users into an organizational structure later. For more information about planning the setup of your user directory, see "Planning Your Directory Setup" on page 58.

To create a user account

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. In the left pane, on the **Directory View** tab, expand the tree to locate the OU in which you want to create the user account.

3. Right-click the name of the OU, and click **Create New User**.

   In the right pane, the *Create New User Within [name of the OU]* page displays.

4. On the **Required Information** tab, enter the following information:

In this field or list	Do this
Prefix	Select **Dr.**, **Mr.**, **Mrs.**, or **Ms.**
First Name	Type the user's first name (required)
Last Name	Type the user's last name (required)
Work Email	Type the user's e-mail address at work

In this field or list	Do this
User ID	Type the username the user will use to log in (this value cannot be changed) User IDs cannot exceed 20 characters
Password	Type a password for the user to log in with
Verify Password	Reenter the user's password
Licenses	Select **BTRS Alerting License**, **BTRS Admin License**, or **BTRS Collaboration License**

For more information about which license to select, see "Understanding License Types" on page 10.

5 On the **Work Contact** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Organization	Type the name of the user's organization
Title	Type the user's professional title
Business Category	Select the type of industry the user works in
Professional Licenses	Select one or more professional licenses the user holds *Press* **CTRL** *while clicking to select more than one type*
Specialties	Select one or more medical specialties the user practices *Press* **CTRL** *while clicking to select more than one type*
Work Location	Type information about where the user works, such as Building 1045, Intensive Care Wing, or Sacramento

In this field or list	Do this
Work Address	Type the address of the facility the user works in
Work City	Type the name of the city in which the facility is located
Work State/Province	Select the state or province in which your facility is located
Work Zip/Postal Code	Type the ZIP or Postal code for the facility in which the user works *You must enter 5-10 characters*
Work Phone	Type the user's work phone number, including area code and any extension *You must enter at least 10 digits*
Work Fax	Type the user's work fax number, including area code *You must enter 10 digits*

6 On the **Home Contact** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Home Address	Type the user's home address
Home City	Type the name of the city in which the user lives
Home State/Province	Select the state or province in which the user lives
Home Zip/Postal Code	Type the ZIP or Postal code for the city in which the user lives *You must enter 5-10 characters*
Home Phone	Type the user's home phone number, including area code *You must enter 10 digits*

7 On the **Alternate Contact** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Cell Phone	Type the user's cell phone number, including area code *You must enter 10 digits*
Numeric Pager	Type the phone number of the user's numeric pager *You must enter 10 digits*
Alpha Pager Email	Type the e-mail address of the user's alpha-numeric pager
Alternate Phone	Type a phone number other than that of the user's primary work, home, or cell phones, including area code *You must enter at least 10 digits*
Alternate Email	Type an e-mail address other than the user's work e-mail address Enter the complete address; for example: `joe_user@ca.gov` or `fred.smith@hospital.org`
Satellite Phone	Type the number of the user's satellite phone, including area code
Other Means of Contact	Provide information for any additional means people may use to contact the user

8 On the **Misc. Personal** tab, enter the following information.

– or –

You may skip this step and allow the user to enter this information upon log in.

In this field or list	Do this
Degrees	Type any degrees the user holds
Lang. Spoken	Select one or more languages the user speaks

In this field or list	Do this
CPR Cert.	Select this check box if the user is CPR certified

You can save the user's profile without assigning the user to a role, however, the user will not receive alerts until he or she is assigned to a role.

9 Click **Save**.

– or –

Leave the page open and skip to the next section to assign the user to one or more roles.

After saving the user account, BTRS displays the message, "This User has not been assigned a Role. Are you sure you want to save this User without an assigned Role?"

10 Click **OK** to save without assigning a role.

BTRS displays the message, "User Account for [name of user] successfully created in [name of OU]."

11 Click **OK** to refresh the User Directory tree.

Assigning Users to Roles

BTRS enables you to assign users to roles either through the Manage Users function or through the Manage Roles function.

In the first case, you assign an individual user to his or her roles; you likely would assign roles on a one-by-one basis after the initial setup, on an ongoing maintenance basis.

In the Manage Roles function you access the role and assign all users who perform that function; this method might save time when you first create your user directory by allowing you to create all users, then assign roles in bulk.

This section describes the process for assigning users to roles through the Manage Users function. For information on assigning roles to users through the Manage Roles function, see "Assigning Users to Roles" on page 72.

To assign users to roles through the Manage Users function

1 Follow the steps in "To create a user account" on page 101 to create a user account.

2 On the **Roles** tab, click **Add Roles**.

BTRS opens the *Select Roles* window.

You may also search for the role on the **Search** tab, or select from an alphabetical listing on the **List** tab.

3 On the **Tree** tab, expand the tree to locate the role you want to assign to the user.

You may select as many roles as pertain to that user's job functions.

4 Click **OK**.

BTRS closes the *Select Roles* window, and displays the role(s) you select in the **Roles assigned to this User** list.

To view information about a particular role you have selected, click the name of the role, then click **View Role**.

5 When you are finished, click **Save**.

Viewing User Profiles

You can see how an individual user's account is configured through the Manage Users function, including the user's account information, management rights, and the user's profile summary, contact information, and personal information.

To view a user's profile

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, on the **Directory View** tab, expand the tree to locate the user you want to view.

4 Click the user's name.

In the right pane, the user's profile and account information display.

Editing User Profiles

After you save a user's account, you can make modifications to the account, including:

- Updating contact information
- Adding or deleting roles assigned to the user
- Updating the user's alerting profile(s)
- Resetting the user's password
- Resetting the user's security code

Changes you make to an active user account may take up to 15 minutes to take effect.

You can also move an existing user to another OU. For information, see "Moving Users to Different OUs" on page 98.

To edit a user's account profile

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, on the **Directory View** tab, expand the tree to locate the user account you want to update.

4 Right-click the user's name, and click **Edit User Properties**.

In the right pane, the *Edit User [name of the user]* page displays.

5 Modify the user's profile and assigned roles as necessary.

For more information about entering user profile data, see "Creating Users" on page 101. For more information about assigning users to roles, see "Assigning Users to Roles" on page 105.

6 Click **Save**.

BTRS displays the message, "User Account for [name of user] successfully saved!"

BTRS sends an e-mail notification to the user to inform him or her that the profile was updated.

Editing Alerting Profiles

Should you need to, you can update a user's alerting profiles, including modifying or deleting existing profiles or creating new profiles. You can also update a user's alerting profile schedule.

To edit an alerting profile

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, on the **Directory View** tab, expand the tree to locate the user account for which you want to update alerting profiles.

4 Right-click the user's name, and click **Edit Alerting Profiles**.

The user's alerting security code must be set before you can create an alerting profile. For more information about setting alerting security codes, see "Resetting Alerting Security Codes" on page 108. For more information about alerting profiles see the *User Guide*.

In the right pane, the *Change Alerting Profiles for [name of user]* page appears.

5 Select an existing profile, and perform one or more of the following functions:

Click this	To do this
Set as Default	Set selected profile as the default
Edit	Display the *Profile Name* page For information about editing alerting profiles, see the *User Guide*
Delete	Delete that profile
Scheduler	Open the user's alerting profile schedule

– or –

To create a new profile, click **New**.

The *Profile Name* page displays. For more information about creating new alerting profiles, see the *User Guide*.

Resetting User Passwords

Should you need to, you can reset a user's password so they can access the BTRS portal.

Original passwords do not display in the user's profile, however, the user can choose to change his or her password to the password he or she previously used.

To reset a user's password

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, on the **Directory View** tab, expand the tree to locate the user account for which you want to reset the password.

4 Right-click the user's name, and click **Reset User Password**.

In the right pane, the *Reset Password for [name of user]* page appears.

5 In the **New Password** field, type a new password for the user.

6 In the **Verify Password** field, reenter the new password.

7 Click **Save**.

BTRS displays the message, "Password successfully reset for [name of user]!"

Resetting Alerting Security Codes

Should you need to, you can reset a user's security code so they can listen to alert messages over the phone.

Current security codes do not display in the user’s profile, however, the user can choose to change his or her security code to the one he or she previously used.

To reset a user’s security code

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, on the **Directory View** tab, expand the tree to locate the user account for which you want to reset the security code.

4 Right-click the user’s name, and click **Reset Alerting Security Code**.

In the right pane, the *Reset Alerting Security Code for [name of user]* form appears.

5 In the **New Alerting Security Code** field, type a new security code for the user.

6 In the **Verify Alerting Security Code** field, reenter the new code.

7 Click **Save**.

BTRS displays the message, “Alerting security code successfully reset for [name of user]!”

Deactivating Users

When a user no longer needs to access the BTRS portal, you can deactivate the account to prevent unauthorized entry.

Take care in selecting users for deactivation. Once removed from the User Directory, you cannot reactivate a user account. For more information on or for help with this feature, please contact Global Secure Systems.

To deactivate a user

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, on the **Directory View** tab, expand the tree to locate the user account you want to deactivate.

4 Right-click the user’s name, and click **Deactivate User**.

BTRS displays the message, “Are you sure you want to deactivate [name of user]?”

5 Click **OK** to confirm.

BTRS displays the message, “User [name of user] has been deactivated.”

– or –

If you want the user to remain active, click **Cancel**.

Searching for Existing Users

After you have created user accounts, you can search for individual users in the User Directory. BTRS enables you to search for users either by entering all or part of the user’s name.

Only those users you have permission to manage appear in the search results.

To search for existing users

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page appears.

3 In the left pane, click the **Search** tab.

4 In the **Search User** field, type the search string you want to use:

For example, type this	To search for
D	All users whose names (first or last) contain the letter “D”
Del	All users whose names (first or last) contains the string “Del”
Delgado	All users whose names (first or last) contain the string “Delgado”

5 Click **Search**.

BTRS searches for and displays a list of users with names containing the search criteria you entered.

– or –

If no users are found, BTRS displays the message “no User Found.”

6 To view a user’s profile, click the user’s name.

– or –

Right-click the user’s name for other actions you can perform.

Confirming Alerts for Users

BTRS Administrators can confirm alerts for users they can manage who are unable to confirm an alert from any device. When you confirm an alert for a user, the user's confirmation status changes on the *Alert Details* page, including the date/time you confirm, as well as the name of the administrator who confirmed the alert in the Reason column.

To confirm an alert for a user

1 On the BTRS navigation bar, click **BTRS Admin**.

The **BTRS Admin** page appears.

2 Under Manage Groups and Users, click **Manage Users**.

The *Manage Users* page displays.

3 In the left pane, in the directory tree, locate the name of the user for whom you want to confirm an alert.

4 Right-click the user's name, and click **Confirm Alerts for User**.

The *Unconfirmed Alerts for [name of user]* page displays.

5 Next to the **Date/Time Sent** column for the alert(s) you want to confirm, select the check box(es).

You must confirm alerts separately for each page of the results list.

6 Click **Confirm**.

BTRS displays the message, "Are you sure you want to confirm the selected alert(s)?"

7 Click **OK**.

7 Generating Reports and Logs

To augment the numerous functions that BTRS provides, BTRS administrators have the ability to generate several reports and logs to maintain and track data, documents, and users within the portal. Each log or report provides a detailed analysis of one or more facets of the BTRS system, including the Document Library, the alerting system, and the User and Role Directories.

This chapter provides both steps for generating each report, and where applicable, an overview of the details included in the results. This chapter assumes that you have a BTRS Admin license, and appropriate management or alerting permissions to generate each log or report.

User Reports

BTRS provides four user-based reports for BTRS administrators to review information entered in user profiles. All reports enable administrators to view profile information for only those users or OUs that the administrator can manage.

Basic User Report

The Basic User Report enables BTRS administrators to view select profile information for all users within the role and user OUs the administrator's role can manage. The report displays only the profile information you choose for each user you are able to manage. In addition, you can select whether to export the query results to an .html page or a .csv file (to import into Microsoft® Excel or other table).

The report can help you locate a particular aspect of each user's profile, such as a cell phone or pager number; what type of license each user is assigned; or which roles each user is assigned to. Conversely, the report can help you locate what information might be missing from users' profiles.

You can select one or more profile items to include in the report from the following types of information:

- Personal information
- Work contact information
- Home contact information
- Alternate contact information

- Miscellaneous personal information
- User account information

The data displayed in the report is determined by the information each user enters in his or her profile.

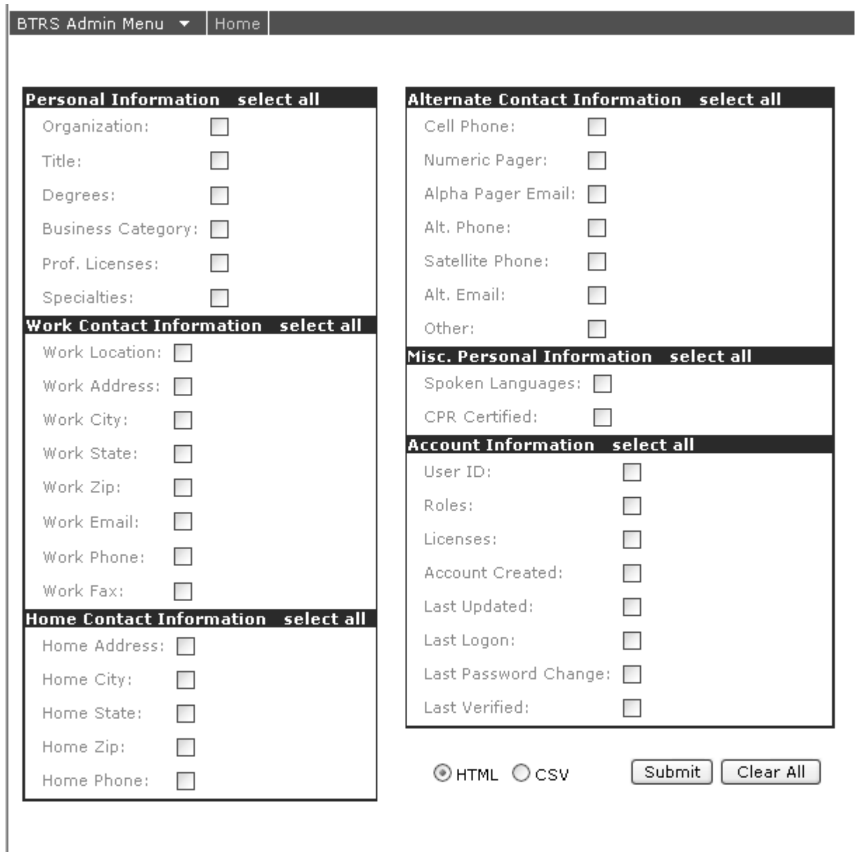
To generate a Basic User Report

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Basic User Report**.

The *Basic User Report* form opens.



Basic User Report form

3 For each section, select one or more options to include in the report.

– or –

To include all the elements of a particular section, click the **select all** link next to the section's title.

4 Under the **Roles to Extract** list, select one of the following extract options:

Select this option	To format the extract in this way
HTML	Results appear in a Web browser window in HTML format
CSV	Results appear in a Web browser in Microsoft® Excel format

5 When you are done, at the bottom of the page, click **Submit**.

BTRS generates the query results in the format you request.

– or –

If no users meet the criteria you entered, BTRS displays the message, “No users match the search criteria.”

In HTML format, to view users on subsequent pages, click the numbered links at the top or bottom of the page. To close the window, click the **X** in the top-right corner.

(2595 users returned)

... 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52

First Name	Last Name	Work Zip	Work Email	User ID	Roles
Peter	O'Toole		maryam.o'kelley@anagency.gov	potoole	QA Role
Admin	User		test1@anycounty.gov	adminuser	QA Role
Bob	Smith	10001	bsmith@abilinecounty.gov	bsmith	HAN Coordinator - Public Information
Francis	Jones	10001	fjones@abilinecounty.gov	fjones	Fire Department -
Betty	Johnson	10001	bjohnson@abilinecounty.gov	bjsmith	Epidemiologist - Ab
Richard	Bosco	10001	rbosco@abilinecounty.gov	rbosco	EMT Transport Serv
Peter	Henderson	10021	phenderson@adamscounty.gov	phenderson	Public Information
Brandon	Weslowski	10021	bwesloski@adamscounty.gov	bweslowski	Fire Department -
Sandra	Kelly	10021	skelly@adamscounty.gov	skelly	Epidemiologist - Ad

Basic User Report (selected criteria displayed)

Directory Extract

The Directory Extract provides profile information for each user in the User OUs that a BTRS administrator has permission to manage. The Directory Extract enables you to search for and view all the available profile information for only those users who meet the criteria you specify in your query. In addition, you can select whether to export the query results to an .html page, a .csv file (to import into Microsoft® Excel or other table), or to an .xml file (to import into other databases).

For example, the report can help you quickly locate all users who speak a particular language, have entered a cell phone number, or work in a particular city or state. Conversely, you can easily review the results to determine which users have not entered information in their user profiles.

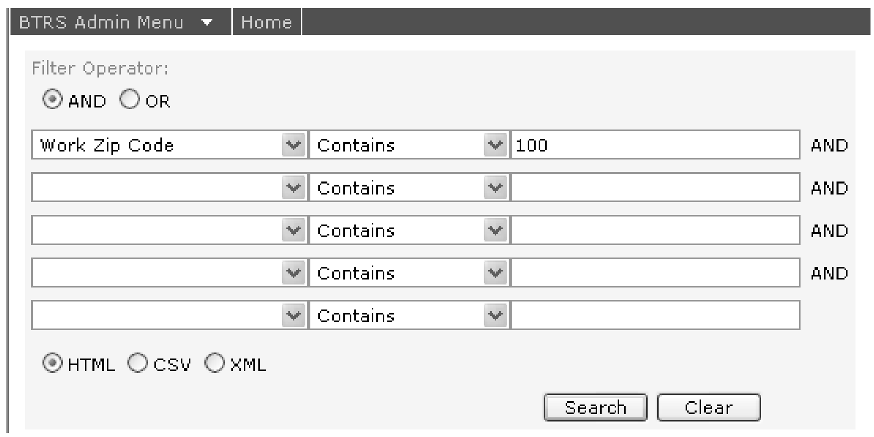
To create a directory extract

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Manage Groups and Users, click **Directory Extract**.

   The *Directory Extract* form opens.



3. In the first drop-down list, select the user profile item you want to search for, such as **Last Name**, **City**, or **Cell Phone**.

4. In the second drop-down list, select the term that best suits your search type:

Select this term	To search for items in the first column that
Contains	Include anywhere the text you type in the next step For example, to search for the city “Richmond”, type “`ri`” or “`mond`” in the third field
Equals	Match exactly the text you type in the next step For example, to search for the city “Richmond”, type “`Richmond`”
Starts with	Begin with the text you type in the next step For example, to search for the city “Richmond”, type ‘`r`”, “`ri`”, or “`rich`” in the third field
Ends with	End with the text you type in the next step For example, to search for the city “Richmond”, type “`mond`” or “`d`” in the third field

5 In the third field, type the text you want to search for, based on the information you entered in the first and second lists.

6 Repeat step 3 – step 5 for each criterium you want to include in the query.

7 On the right side of the page, select **AND** if you want BTRS to search for users who meet all the criteria you specify.

– or –

Select **OR** if you want BTRS to search for users who meet any of the criteria you specify.

8 Under the criteria you entered, select one of the following extract options:

Select this option	To format the extract in this way
HTML	Results appear in a Web browser window (saved as an .html file)
CSV	Results appear in a Microsoft® Excel window (saved as a .csv file)
XML	Results appear in a Web browser window (saved as an .xml file)

9 Click **Search**.

BTRS generates the query results in the format you request.

– or –

If no users meet the criteria you entered, BTRS displays the message, "No users match the search criteria."

Found 7 records

1

Last Name	First Name	Business Category	Professional Licenses	Specialties	Organization	Title	Degrees	Work Location	Work
Bosco	Richard	Public Health	CCMC		Abiline County				
Henderson	Peter	Public Health	CCMC		Allensberg				
Johnson	Betty	Hospitals	CCMC		County General	Dr.			
Jones	Francis	Public Safety	EMT		Abiline County				
Kelly	Sandra	Public Health	CPR		Adams County				
Smith	Bob	Emergency Services			Allensberg				
Weslowski	Brandon	Public Health			Adams County				

Directory Extract results (selected criteria displayed)

Role Extract

The Role Extract enables BTRS Administrators to generate a list of user information based on roles that the administrator can manage. You can select from the list of role(s) you can manage, then choose which profile information to include in the report. The generated report displays each user's first and last name, as well as the profile information each user has entered for each additional field you include. In addition, the report lists each role you select, and indicates which users belong to which roles.

Before you can use the Role Extract, you must have permission to access the Role Extract page. For information about assigning application rights, see "Assigning Application Rights to Roles" on page 74.

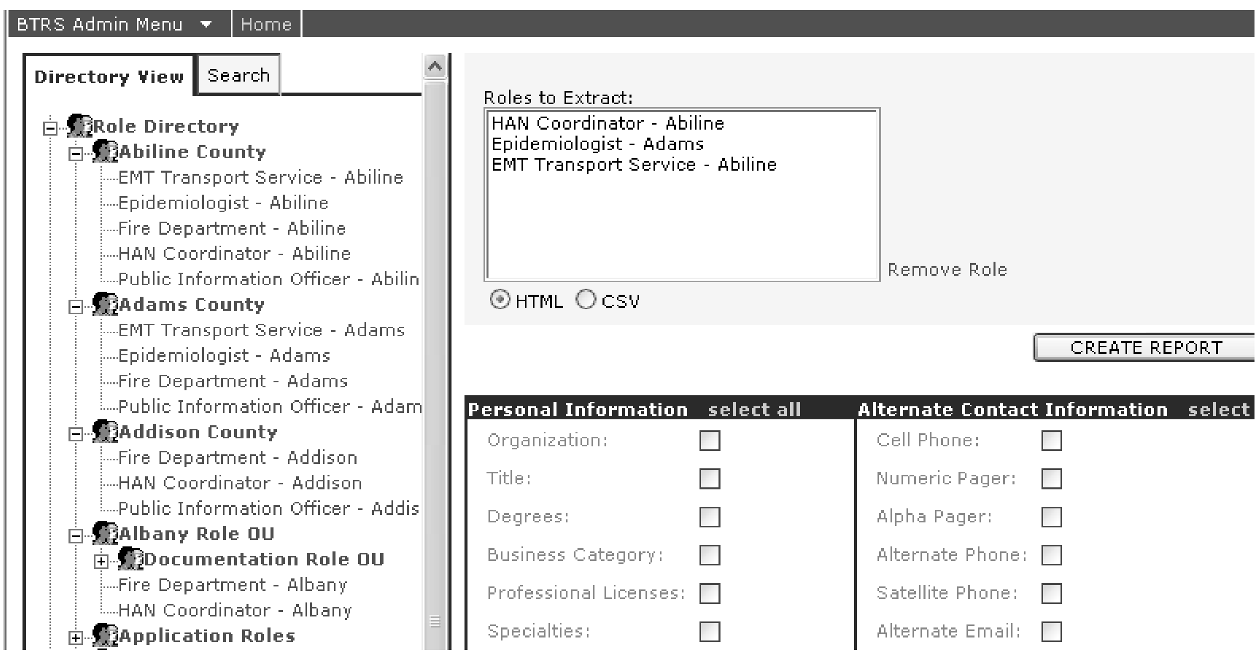
To generate the Role Extract

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Manage Groups and Users, click **Role Extract**.

The *Role Extract* form appears.



Role Extract form

3 In the left pane, select one or more roles for which you want to extract user information.

Each role you select appears in the right pane in the **Roles to Extract** list.

4 In the right pane, for each section, select one or more user profile options to include in the report.

– or –

To include all the elements of a particular section, click the select all link next to the section's title.

By default, each user's first and last name are included in the search results.

5 Under the **Roles to Extract** list, select one of the following extract options:

Select this option	To format the extract in this way
HTML	Results appear in a Web browser window in HTML format
CSV	Results appear in a Web browser in Microsoft® Excel format

6 When you are done, click **CREATE REPORT**.

BTRS displays the message, "Are you sure you want to create this report?"

7 Click **OK**.

BTRS generates the query results in the format you request.

Total users: 3

Last Name	First Name	User ID	Work Zip	Work Email	HAN Coordinator - Abiline	Epidemiologist - Adams	EMT Transport Service - Abiline
Bosco	Richard	rbosco	10001	rbosco@abilinecounty.gov			X
Kelly	Sandra	skelly	10021	skelly@adamscounty.gov		X	
Smith	Bob	bsmith	10001	bsmith@abilinecounty.gov	X		

Role Extract results

Blast Fax Report

The Blast Fax Report enables BTRS administrators to create .csv files to use in conjunction with external blast fax applications. All the role(s) and role group(s) that you have permission to alert appear in the *Creating Blast Fax Report* page.

The report includes each user's first and last name, and the fax number entered in that user's profile. In addition, you can elect to include or exclude those users who have not entered fax numbers.

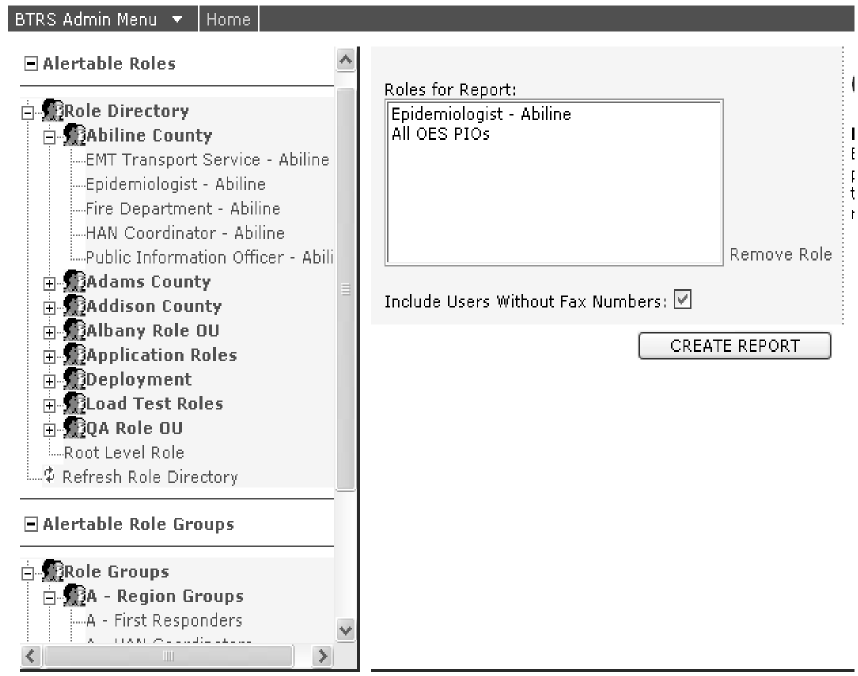
▸ To generate a Blast Fax Report

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **Blast Fax Report**.

The *Creating Blast Fax Report* page opens.



Creating Blast Fax Report page

You may select as many roles and or role groups as you wish. In the right pane, roles and role groups you select appear in the **Roles for Report** list.

3 In the left pane, in the tree, do one or more of the following:

To do this	Do this
Select individual roles and/or role groups	Click each role and/or role group to which you want to send the alert
Select all roles or role groups within an OU	Right-click the OU that contains the roles or role groups you want to include in the alert, and click **Select All Roles in OU** or **Select All Role Groups in OU**
Select all roles or role groups within an OU and its sub-OUs	Right-click the OU that contains the sub-OUs and roles you want to include in the alert, and click **Select All Roles in OU and Sub OUs** or **Select all Role Groups in OU and Sub OUs**

Each role and role group you select appears in the right pane in the **Roles for Report** list. Only the roles and role groups you have permission to alert appear in the tree.

4 Select the **Include Users without Fax Numbers** check box if you want to generate a report that includes all the users in the roles and role groups you select, regardless of whether all users have entered a fax number in their profiles.

5 Click **CREATE REPORT**.

BTRS displays the message, “Are you sure you want to create this report?”

6 Click **OK**.

BTRS generates the report in a .csv file format.

Alert Reports

BTRS provides a log for BTRS administrators to view alerts sent by users you can manage. The Alert History Log enables you to search for and view the details of each alert sent. It provides a list of all alerts sent that match the date/time, role, and/or user criteria you enter.

Action	Date/Time Sent	Expiration	Sent From	Subject	Priority
N/A	8/26/2004 9:31:05 AM	8/31/2004 9:31:05 AM	Brooke Manly	Early Warning Siren System Testing This Week	Medium
N/A	8/25/2004 10:14:10 AM	8/26/2004 10:14:10 AM	Harriet Oldenburg	Preparation for Chemical Release Investigation	↓ Low
N/A	8/25/2004 10:10:16 AM	8/26/2004 1:10:16 PM	Chris Edwards	Potential Evacuation in Littlefield Due to Chemical Release	Medium
N/A	8/24/2004 2:28:17 PM	8/28/2004 2:28:17 PM	Georgette Rankin	Chemical Exposure in Littlefield	! High
N/A	8/24/2004 2:27:22 PM	8/31/2004 2:27:22 PM	Georgette Rankin	Major Spillage in Littlefield Accident - Trucks Carrying Chemicals	! High
N/A	8/14/2004 1:43:23 PM	8/14/2004 2:43:23 PM	Chris Edwards	Investigation Results	↓ Low

1

Alert History Log (sorted by sent date/time)

For more information about reviewing the details of a sent alert, see the *User Guide*.

The log includes the following information:

This column	Includes the following information
Action	If applicable, the Cancel button; otherwise, displays **NA** (Not Applicable) **The Cancel button appears for any non-cancelled alert until it expires** Click the **Cancel** button to cancel an active alert
Date/Time Sent	The date and time the alert was sent Click the link to view the alert's details on the *Alert Details* page
Expiration	The date and time the alert expires
Sent From	The name of the user who sent the alert
Subject	The text the sender entered in the **Subject** field
Priority	The priority the sender selected (**Low**, **Medium**, or **High**)

Alert History Log

The Alert History Log enables you to search for alerts sent by specific individuals, as well as by the role the alert was sent to, and the period of time during which it was sent.

The values you provide in each field in the *Alert History Log* page are optional. To view all alerts sent by all users you can manage, leave all fields blank, then click **Search**.

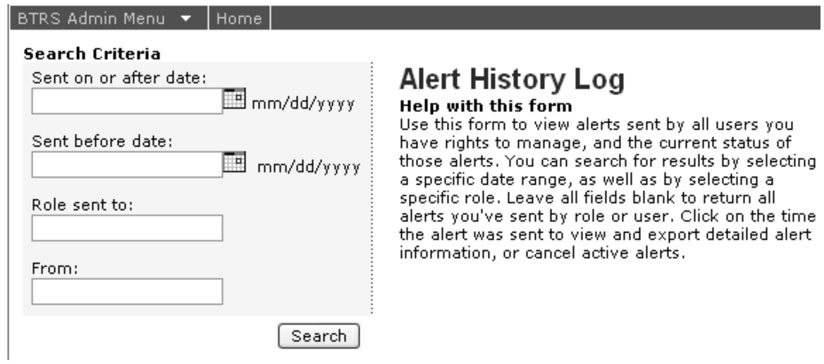
To generate an Alert History Log

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **Alert History Log**.

The *Alert History Log* page opens.



You can enter values for each field in the page as necessary; the values you provide are optional. To view all the alerts sent by users you can manage, leave all fields blank, then click **Search**.

3 In the **Sent on or after** date field, type or select the date on or after which the alert was sent.

Click the calendar icon next to the field to view and select from dates on the calendar.

In the **Sent before date** field, type or select the date before which the alert was sent. Searches do not include the date you enter in this field.

Click the calendar icon next to the field to view and select from dates on the calendar.

4 In the **Role sent to** field, type the name of the role or role group the alert was sent to.

You can type some or all of the role, to search for sent alerts. For example, to view alerts sent to the Northwest Region HAN Coordinator, type “`north`” or “`northwest`”.

Only those alerts sent by users you can manage appear in the results of your search, regardless of which role(s) or role group(s) the alert is sent to.

---

5 In the **From** field, type the name of the user who sent the alert.

You can type any part of the user’s name. For example, to search for the user named George Krantz, type “`kran`” or “`geo`”.

6 Click **Search**.

The alerts matching your criteria display on the bottom half of the page. To view additional pages of results, click the numbered links above or below the alert results section.

– or –

If no alerts match the criteria you enter, BTRS displays the message, “Found 0 records.”

Document Reports

BTRS contains several reports and logs to help BTRS administrators track and monitor activity within the Document Library. These reports and logs provide historical data for documents that have been checked out, modified, faxed, reside in a particular folder, or are waiting to be approved.

Fax History Log

The Fax History Log enables you to search for and view the details of documents in the Document Library faxed by users you can manage. You can search for faxes sent by specific individuals, as well as by the role or role group the fax was sent to, and the period of time during which it was sent.

The Fax History Log displays a list of documents faxed by users you can manage. The results displayed in the log are determined by the criteria you enter in the *Fax History Log* page.

Date/Time Sent	Sent From	Document Title
8/29/2004 9:10:37 AM	Patrick Harris	Hamilton County First Responder Basic Training Course
7/05/2004 6:47:15 AM	Verna Burns	DOH Investigation Procedure Recommendations
5/15/2004 9:26:04 AM	Brooke Manly	Physician Contact List 02-04
4/21/2004 12:49:31 AM	Harriet Oldenburg	Littlefield Chemical Exposure Investigation Results
3/08/2004 8:49:38 AM	LaTrice Henderson	CDC West Nile Virus Quarantine Guidelines

Fax History Log (sorted by date)

The log includes the following information:

This column	Includes this information
Date/Time Sent	The date and time the fax was sent Click the link to display the fax details on the *Fax Details* page
Sent From	The name of the user who sent the fax
Document Title	The name of the document faxed

Only those documents in the Document Library that have been faxed using the Fax option appear in this log. You can view alerts sent via fax in the Alert History Log. For more information about faxing documents, see the *User Guide*. For more information about the Alert History Log, see “Alert History Log” on page 122.

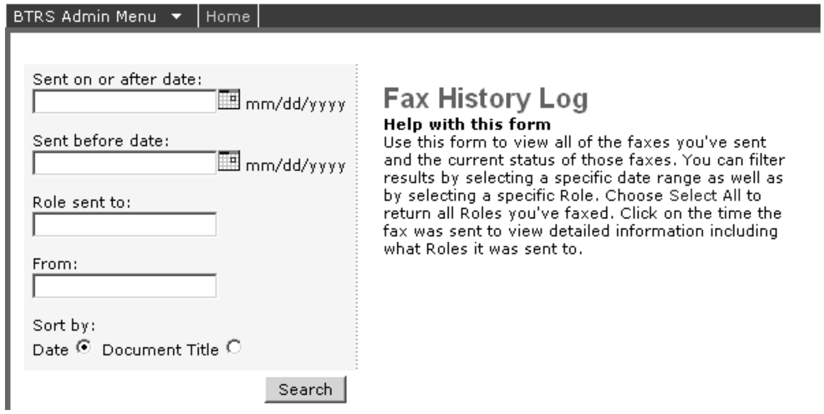
To generate a Fax History Log

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **Fax History Log**.

The *Fax History Log* page opens.



You can enter values for each field in the form as necessary; the values you provide are optional. To view all the faxes sent by users you can manage, leave all fields blank, then click **Search**.

3 In the **Sent on or after** date field, type or select the date on or after which the fax was sent.

Click the calendar icon next to the field to view and select from dates on the calendar.

4 In the **Sent before date** field, type or select the date before which the fax was sent. Searches do not include the date you enter in this field.

Click the calendar icon next to the field to view and select from dates on the calendar.

5 In the **Role sent to** field, type the name of the role or role group the fax was sent to.

You can type some or all of the role name. For example, to view faxes sent to the Northwest Region HAN Coordinator, type "`north`" or "`HAN`".

Only those faxes sent by users you can manage appear in the results of your search, regardless of which role(s) or role group(s) the fax is sent to.

---

6 In the **From** field, type the name of the user who faxed the document.

You can type any part of the user's name. For example, to search the user named George Krantz, type "`kran`" or "`geo`".

7 Click **Search**.

The faxes matching your criteria display on the bottom half of the page. To view additional pages of results, click the numbers above or below the document titles.

– or –

If no faxes match the criteria you enter, BTRS displays the message, "Found 0 records."

Documents Checked Out Log

The Documents Checked Out Log provides a list by document title of all documents currently checked out from folders you can manage. The log provides information about the document, the folder it in which it is located in the Document Library, the user who checked the document out, and the date and time the user checked it out.

The Documents Checked Out Log is an automatically generated log that displays a complete list of all documents currently checked out to users.

BTRS Admin Menu | Home

Title	Folder	Checked Out By	Date
Lightning—The Underrated Killer	../Documents/Public Health Information	STATEHAN\swilliams	9/2/2004 9:12:29 AM
Fight the Bite! Avoid Mosquito Bites to Avoid Infection	../Documents/Public Health Information	STATEHAN\holdenburg	9/3/2004 9:17:16 AM
BTRS 2.3a Administrator Guide	../Documents/BTRS Documentation	STATEHAN\msonnell	9/3/2004 9:17:50 AM
A Reporter's Guide to Terrorism: A Practical Guide to the Threat of Terrorism	../Documents/Public Relations/Media Releases	STATEHAN\msonnell	9/7/2004 10:42:00 AM
CDC Offers Advice for People to Protect Themselves During and After a Hurricane	../Documents/Public Relations/Media Releases	STATEHAN\holdenburg	9/10/2004 10:42:10 AM
Flood Recovery Bulletin: Tips for Post-flood Sanitation and Hygiene	../Documents/Public Relations/Media Releases	STATEHAN\holdenburg	9/17/2004 10:42:18 AM

Documents Checked Out Log

You can check in a document that has been checked out by another user through the *Document Inspection* page. For more information about undoing a checked out document, see “Managing Checked Out Documents” in Chapter 3, page 46.

The log includes the following information:

This column	Includes this information
Title	The title of the document Click the link to display the document’s information on the *Document Inspection* page
Folder	The location where the document is stored in the Document Library
Checked Out By	The username of the person to whom the document is checked out
Date	The date and time the document was checked out

To generate a Documents Checked Out Log

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

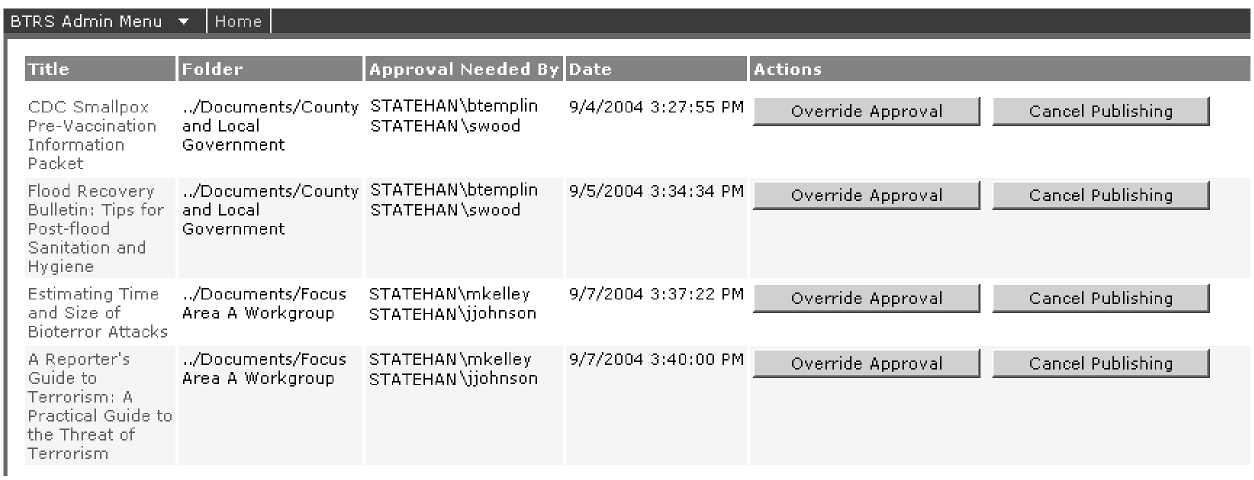
2 Under Reports and Logs, click **Documents Checked Out Log**.

The *Documents Checked Out Log* page appears, displaying all documents currently checked out.

Documents Awaiting Approval Log

The Documents Awaiting Approval Log enables BTRS administrators to view documents that have been added to the Document Library in folders you manage, but that have not yet been approved for publishing. In addition, you can either approve or reject documents for other users in the case that the document needs to be worked on or published without the approval of a designated user. You do not need to be an assigned approver to view or approve/reject the documents in this log.

The Documents Awaiting Approval Log is an automatically generated log that displays a complete list of all documents currently waiting for the approval of one or more users before being published in the Document Library.


BTRS Admin Menu | Home

Title	Folder	Approval Needed By	Date	Actions	
CDC Smallpox Pre-Vaccination Information Packet	../Documents/County and Local Government	STATEHAN\btemplin STATEHAN\swood	9/4/2004 3:27:55 PM	Override Approval	Cancel Publishing
Flood Recovery Bulletin: Tips for Post-flood Sanitation and Hygiene	../Documents/County and Local Government	STATEHAN\btemplin STATEHAN\swood	9/5/2004 3:34:34 PM	Override Approval	Cancel Publishing
Estimating Time and Size of Bioterror Attacks	../Documents/Focus Area A Workgroup	STATEHAN\mkelley STATEHAN\jjohnson	9/7/2004 3:37:22 PM	Override Approval	Cancel Publishing
A Reporter's Guide to Terrorism: A Practical Guide to the Threat of Terrorism	../Documents/Focus Area A Workgroup	STATEHAN\mkelley STATEHAN\jjohnson	9/7/2004 3:40:00 PM	Override Approval	Cancel Publishing

Documents Awaiting Approval Log

The log includes the following information:

This column	Includes this information
Title	The name of the document Click the link to display the document's details on the *Document Inspection* page
Folder	The location where the document is stored in the Document Library
Approval Needed By	The username(s) of the user(s) who have been selected to approve the document *Some documents may not require the approval of all displayed users*
Date	The date and time the document was added to the Document Library

This column	Includes this information
Actions	The **Override Approval** and **Cancel Publishing** buttons Click the buttons to approve or reject the document; for more information, see “Working with Folder Approval Routing” on page 42

To generate a Documents Awaiting Approval Log

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

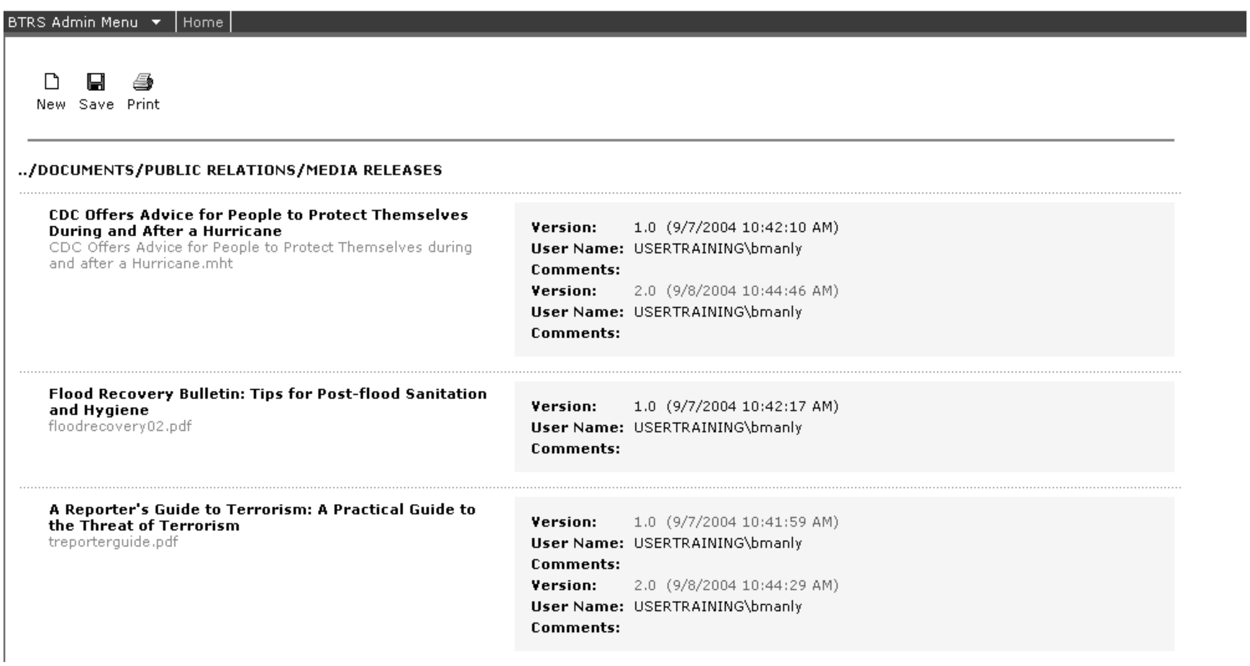
2 Under Reports and Logs, click **Documents Awaiting Approval**.

The *Documents Awaiting Approval* page appears, displaying all documents currently waiting to be approved.

Document History Report

The Document History Report provides BTRS administrators with a method to review the history of documents in folders you can manage. Each document is listed by folder, and includes a link to each version of the published document. In addition, the name of the user who published the last version of the document, as well as the date and time the document was published, is included for each document.

The Document History Report provides version history information for documents in one or more folder(s) you select to view. The report enables you to view versions of each published document, and additional information including who published the version, and when.



Document History Report

If the document is checked in and has not yet been published, BTRS displays the message, “No version history for this document” next to the document name.

The log contains the following information:

This area	Includes this information
Folder path	Location of the folder that contains the documents displayed in the report (displayed above document title in left pane)
Document title	Name of the document (displayed in bold in left pane), and document’s file name (displayed under document title)
Version	Last published version of the document, and date and time it was published Click the link to view that version of the document
User Name	Name of the user who published that version of the the document
Comments	Text entered by the user in the **Version Comments** field on the *Document Inspection* page for that version of the document

To generate a Document History Report

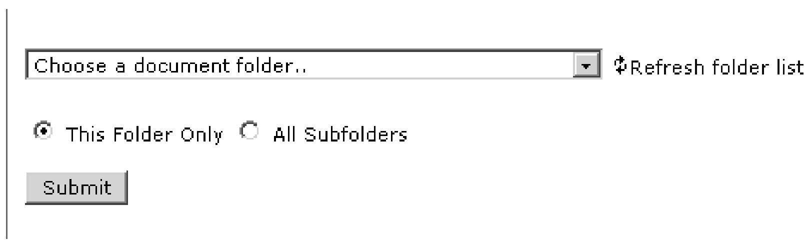
1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **Document History Report**.

The *Document History Report* form opens.

If the folder you want to select does not appear, next to the list, click **Refresh Folder List**.



3 In the list, select the folder that contains the document(s) for which you want to view version history.

4 Select **This Folder Only** to view only those documents in the folder you selected.

– or –

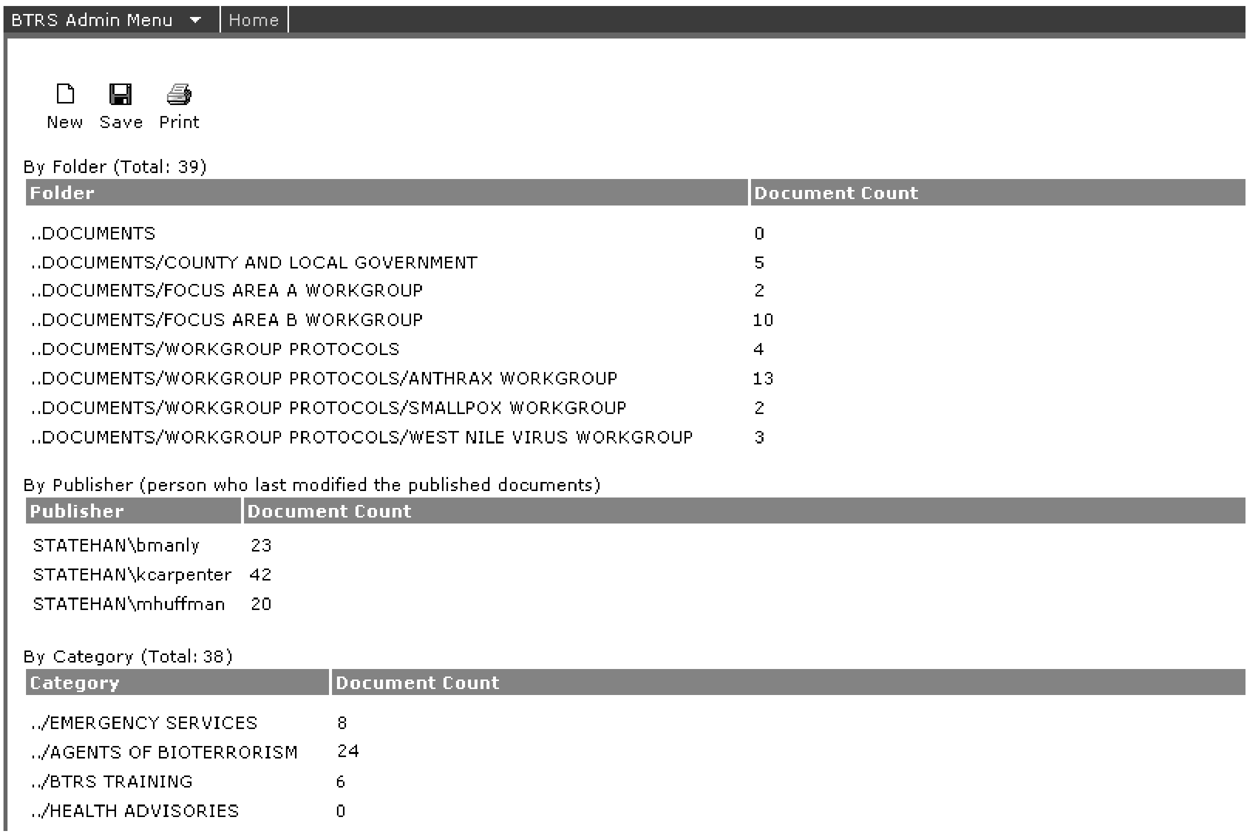
Select **All Subfolders** to view documents in this folder and all subfolders.

5 Click **Submit**.

BTRS generates the report and displays the results on the page.

Document Totals Log

The Document Totals Log displays the total number of documents within the Document Library that match criteria you enter. In the log, you can choose to view all documents stored in folders you have permission to view; the number of documents last published by each user (regardless of permissions); and/or the number of documents assigned to each category.


BTRS Admin Menu | Home

New Save Print

By Folder (Total: 39)

Folder	Document Count
..DOCUMENTS	0
..DOCUMENTS/COUNTY AND LOCAL GOVERNMENT	5
..DOCUMENTS/FOCUS AREA A WORKGROUP	2
..DOCUMENTS/FOCUS AREA B WORKGROUP	10
..DOCUMENTS/WORKGROUP PROTOCOLS	4
..DOCUMENTS/WORKGROUP PROTOCOLS/ANTHRAX WORKGROUP	13
..DOCUMENTS/WORKGROUP PROTOCOLS/SMALLPOX WORKGROUP	2
..DOCUMENTS/WORKGROUP PROTOCOLS/WEST NILE VIRUS WORKGROUP	3

By Publisher (person who last modified the published documents)

Publisher	Document Count
STATEHAN\bmanly	23
STATEHAN\kcarpenter	42
STATEHAN\mhuffman	20

By Category (Total: 38)

Category	Document Count
../EMERGENCY SERVICES	8
../AGENTS OF BIOTERRORISM	24
../BTRS TRAINING	6
../HEALTH ADVISORIES	0

Document Totals Log (all criteria displayed)

To generate a Document Totals Log

1. On the BTRS navigation bar, click **BTRS Admin**.

   The *BTRS Admin* page appears.

2. Under Reports and Logs, click **Document Totals Log**.

   The *Document Totals Log* form opens.

3 Select one or more of the following options:

Select this option	**To see these results**
View By Folder	The number of documents stored in each folder Only documents in folders you have access to appear in the total count
View By Publisher	The number of documents each user was last to publish Only published versions of documents appear in the total count
View By Category	The number of documents assigned to each category

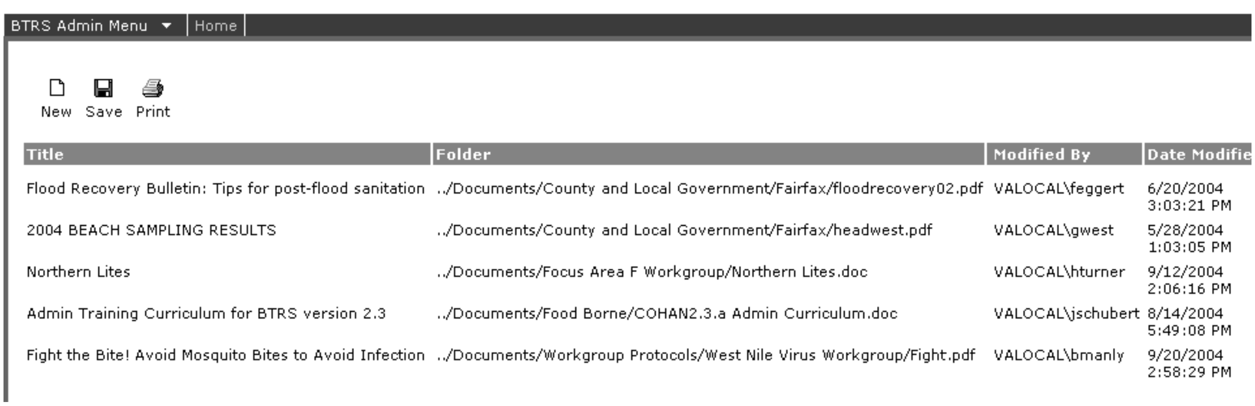
4 Click **View**.

BTRS generates the log and displays the results according to the options you select.

Modified Content Report

The Modified Content Report enables BTRS administrators to view the most recent publishing information for each document within a particular folder. The report includes the name and location of the document, the name of the user who last published the document, and the date and time the document was published.

The Modified Content Report displays the documents that have been modified and republished to the Document Library. The report provides the name of each document, the location of that document in the Document Library, the name of the person who last modified the document, and when the document was last modified.



Title	Folder	Modified By	Date Modifie
Flood Recovery Bulletin: Tips for post-flood sanitation	../Documents/County and Local Government/Fairfax/floodrecovery02.pdf	VALOCAL\feggert	6/20/2004 3:03:21 PM
2004 BEACH SAMPLING RESULTS	../Documents/County and Local Government/Fairfax/headwest.pdf	VALOCAL\gwest	5/28/2004 1:03:05 PM
Northern Lites	../Documents/Focus Area F Workgroup/Northern Lites.doc	VALOCAL\hturner	9/12/2004 2:06:16 PM
Admin Training Curriculum for BTRS version 2.3	../Documents/Food Borne/COHAN2.3.a Admin Curriculum.doc	VALOCAL\jschubert	8/14/2004 5:49:08 PM
Fight the Bite! Avoid Mosquito Bites to Avoid Infection	../Documents/Workgroup Protocols/West Nile Virus Workgroup/Fight.pdf	VALOCAL\bmanly	9/20/2004 2:58:29 PM

Modified Content Report (sorted by folder)

The report contains the following information:

This column	Contains this information
Title	The name of the document
Folder	The location where the document is stored in the Document Library
Modified By	The username of the person who last published the document (in domain/username format)
Date Modified	The date and time the document was last published

To generate a Modified Content Report

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **Modified Content Report**.

If the folder you want to select does not appear, next to the list, click **Refresh Folder List**.

The *Modified Content Report* form opens.

3 In the list, select the folder that contains the documents for which you want to view publishing history.

The report includes documents in all subfolders you have permission to view as well.

To view all the documents published in a particular folder, leave the **Documents published after** and **Documents published before** fields blank.

4 In the **Documents published after** field, type or select the date on or after which the document was published.

Click the calendar icon next to the field to view and select from dates on the calendar.

5 In the **Documents published before** field, type or select the date before which the document was published. Searches do not include the date you enter in this field.

Click the calendar icon next to the field to view and select from dates on the calendar.

6 Select one of the following sorting options:

Select this option	To sort results by
Folder	The folder in which the document resides
Author	The name of the user who last published the document
Date Modified	The date and time the document was last published

7 Click **Submit**.

BTRS generates the report and displays the results in the method(s) you select.

Folder Reports

BTRS provides you with a report to monitor the permissions and approval routing set for each folder in the Document Library. Each BTRS administrator can generate a Folder Permission Report to review information for each folder he or she can view in the Document Library.

Folder Permission Report

For more information about permission levels for folders in the Document Library, see "Working with Folder Permissions" in Chapter 3, page 39.

The Folder Permission Report enables BTRS administrators to review the folder permissions and approval routing set for folders in the Document Library. As long as you have at least Reader permissions for a folder, you can view permissions and approval routing for that folder in the Folder Permission Report.

To generate a Folder Permission Report

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **Folder Permission Report**.

If the folder you want to select does not appear, next to the list, click **Refresh Folder List**.

The *Folder Permission Report* form displays.

3 In the list, select the folder that contains the documents for which you want to view reent publishing history.

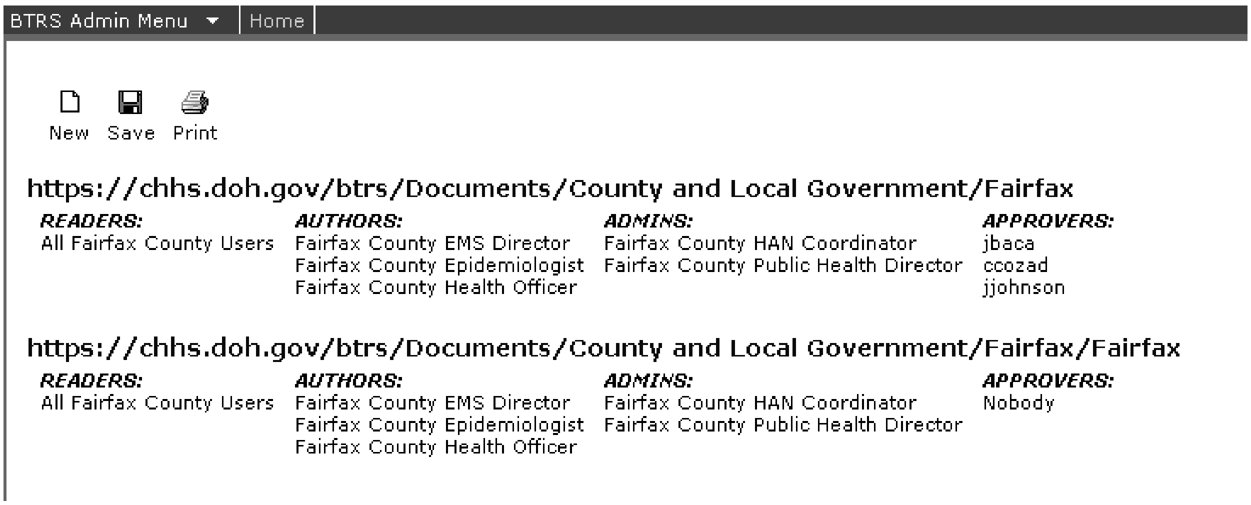
4 Select **This Folder Only** to view only those documents in the folder you selected.

– or –

Select **All Subfolders** to view documents in this folder and all subfolders.

5 Click **Submit**.

BTRS generates the report and displays all modified documents in the folder(s) you select.



Folder Permission Report (folder and subfolders displayed)

License Reports

BTRS provides a method for BTRS administrators to track the number and type of licenses assigned within the BTRS portal. You can generate the License Count Log at any time to view the number of licenses assigned by license level.

License Count Log

For more information about assigning licenses, see "Creating Users" on page 101.

The License Count Log is an automatically generated log that provides data for each type of BTRS user license assigned in the portal. The number of licenses displayed includes those for all users in the User Directory, regardless of your management rights.

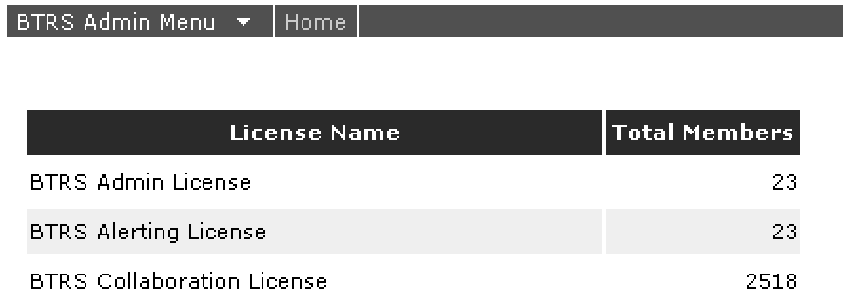
▸ To generate a License Count Log

1 On the BTRS navigation bar, click **BTRS Admin**.

The *BTRS Admin* page appears.

2 Under Reports and Logs, click **License Count Log**.

The *License Count Log* page appears, displaying the number of each type of license assigned.



License Name	Total Members
BTRS Admin License	23
BTRS Alerting License	23
BTRS Collaboration License	2518

Glossary

A

active alerts Alerts that have been sent and have not yet expired.

alert A notification sent to inform or warn roles or users within the BTRS directory.

alert details All details of a sent alert, including the alert's sender, subject, message, priority, send time, expiration, and roles or users notified.

alertable roles Roles designated by a BTRS Administrator to receive alerts from a particular role or role group.

alerting priority The numeric value assigned to a role or user that indicates the order in which users are alerted. (1 is highest).

alert template A standardized set of alerting details that a given group of users has permission to use to send alerts.

application One or more programs in applications software that you can run on your computer. Some examples of applications are database programs (Microsoft® Access), word processors (Microsoft® Word), and spreadsheets (Microsoft® Excel).

approve The process of accepting a draft version of a document as ready for publishing in the Document Library. Only those users designated to be approvers for a specific folder can approve documents. See also **reject**.

Author A user who has permission to add, edit, delete, or read all documents in a folder. Authors can also create, rename, and delete folders, but cannot set folder security policies. In an enhanced folder, authors can also submit any document for publishing.

B

Back button In Microsoft® Internet Explorer, a button on the Standard Buttons toolbar that enables you to return to the page you were previously viewing. Not all pages enable you to use the Back button.

browser A software application used to locate and display Web pages. To use BTRS, you need to use Microsoft® Internet Explorer's browser. Most browsers can display both text and graphics, as well as sound and video.

BTRS Admin A BTRS user with broader permissions to manage portal content and settings, as well as roles, role groups, and users. In addition, BTRS Admins can generate and view various administrative reports and logs.

BTRS System Administrator A user who has permission to set up, configure, and maintain servers; manage server resources; create and update indexes; and control security at the top level of the workspace.

C

categories Groups of related content, organized hierarchically by subject matter.

category folder A folder that is used by coordinators to organize categories.

check in Add or return a document to an enhanced folder. Releases the editing reservation on a document, allowing others to open and edit it. See also **check out**, **enhanced folder**.

check out Create a writable version of a document while preventing other users from editing the same document. See also **check in**, **enhanced folder**.

D

dashboard See **digital dashboard**.

dashboard site A Web site created by using Digital Dashboard technology. The dashboard site contains a number of pages, or dashboards, and includes customization pages and custom Web Part forms. The dashboard site is used to distribute information to workspace users through a Web browser. BTRS is a dashboard site. See also **digital dashboard**, **Web Part**.

digital dashboard A page on a dashboard site. Each dashboard contains a collection of Web Parts in a modular view that can be presented to users in a Web browser. See also **dashboard site**, **Web part**.

directory The collection of Organizational Units (OUs) and the roles, users, or role groups within those OUs.

discussions A feature for adding threaded comments about a document.

document A discrete unit of content and its associated metadata.

Document Library The storage location for documents in the workspace. See also: **folder**.

document profile A set of properties applied to similar documents.

E

enhanced folder A document storage folder that supports document management tasks such as check-in, check-out, versioning, approval, and publishing. See also **folder**, **standard folder**.

extract A generated list of users that meet search criteria; also to create a data report in another format.

F

folder A means of organizing and storing programs, files, and documents on a disk or server. See also **enhanced folder**, **standard folder**.

form see **page**.

full-text search Search of documents, document properties, and content through the use of full-text search predicates. See also **search**.

H

home page The page in BTRS to which users are taken upon login. The page enables users to access news, announcements, and alerts, as well as other areas of the BTRS portal.

K

keywords One or more words associated with a document, folder, or category that a user can use to search for that document, folder, or category.

M

maximize When using a window, to enlarge the size of the window (usually so that it covers the entire page). See also **minimize**.

minimize When using a window, to reduce the size of and replace the window with an icon on your task bar. Minimizing retains the information displayed in the window while allowing you to view other windows. Clicking the icon on the task bar restores the window to its previous size and position. See also **maximize**.

My Profile Information about individual users that can be updated by those users.

N

navigation bar A series of links on each page in BTRS that enable you to view another section of BTRS, such as My Profile, Directory, and Alerts.

O

Organizational Unit (OU) A container that holds objects (such as roles, users, or role groups), similar to a folder. Typically, an organization will create OUs that resemble their organizational structure, maintaining an OU for each department.

P

page A document on the World Wide Web that displays all the content assigned to that page, such as the BTRS home page or Alerts page. In BTRS, a Web page that serves to perform a particular function, such as sending an alert, entering document profiles, or generating a report.

permission(s) Authorizations within the portal, which determine access to documents/ sections in the workspace. For example, the three standard permissions are: Reader, Author, and BTRS Admin.

profile (portal) Information about individual documents that are uploaded into BTRS. The profile information is attached to the corresponding documents and aids in searches. See also **My Profile**.

publish To make a document available to Readers. See also **approve**.

R

Reader A user who can search for and read documents but cannot add them to the workspace. By default, all folder users have Reader permissions. In an enhanced folder, Readers can only view folders and published versions of documents. A Reader cannot check out, edit, or delete workspace documents, nor view draft document versions.

reject The process of not accepting a draft version of a document as ready for publishing in the Document Library. Only those users designated to be approvers for a specific folder can reject documents. See also **approve**.

role A position within an Organizational Unit (OU) that consists of ne or more users.

role group One or more roles grouped together for the purposes of assigning alertable roles, folder permissions, or management rights. See also **alertable roles**, **roles**.

S

search The functionality of finding information in documents based on keywords found in the text of those documents or related to the properties of the documents. This is commonly referred to as full-text search. See also **index**.

standard folder Supports document profiles, but does not support check in, check out, publishing, or document version history.

subscription A request for notification when changes are made to a document; the contents of a folder or a category; or a search results list.

T

tree A method of organizing Organizational Units (OUs), roles, role groups, and/or users in which the groups appear similar to that of the branches of a tree. Clicking the items in the tree expands or collapses the information stored with that branch.

U

undo check out Cancel the check-out of a document. Undoing a document check out makes the last version of the document available for all users to check out.

V

version history The (reverse) chronological listing of revisions that have been made to an item, and any associated comments attached to the version by the user performing the check-in or check-out.

version label A number or other text that indicates the version of an item.

W

Web browser See **browser**.

Web page See **page**.

Web part A customizable, reusable component used to display specific information on a dashboard. Web parts are used to associate Web-based content (such as XML, HTML, and scripting) with a specific set of properties in an organizational framework. See also **dashboard site**, **digital dashboard**.

window An enclosed, rectangular area that displays on your monitor page that runs a program or displays data. You can have several windows open at one time; most allow to you to resize, move, maximize, and minimize the window. See also minimize, maximize and application.

workspace An organized collection of documents, content sources, management folders, categories, document profiles, subscriptions, and discussions. It provides a central location to organize, manage, and publish content.

Index

C

D