



GLOBAL **SECURE** SYSTEMS™

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Bioterrorism Readiness Suite™ 4.1

Alerting User Guide



PREPARE » RESPOND » RECOVER

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1 Introduction

Welcome to the BTRS 4.1 Alerting User Guide!

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

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:

- Receive alerts from other users within your health area network (HAN)
- Locate contact information for other users within your HAN
- Read your HAN's latest news and announcements

What's New in This Version?

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

- *Alert profile scheduling* — You can now assign which days and times each alerting profile will be active, enabling you to create an automated daily schedule for receiving alerts. Alert notifications will be sent to the devices you choose anytime, day or night, based on your active profile. BTRS automatically changes activates/deactivates the alerting profile at the time you designate in your schedule. For example, BTRS can automatically switch your active alerting profile on Friday at 6:00 pm to “Out of Office”. On Monday morning at 7:00 am, BTRS then switches to your “In Office” alerting profile.

- *Expanded e-mail confirmation ability* — Alert recipients can now confirm an alert by replying to an e-mail directly rather than going through the portal. This is particularly useful when using handheld devices that cannot access the Internet.
- *Password and profile update reminders* — You may now receive e-mail notifications to remind you to update your profile or change your password in accordance with your organization's requirements.

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. In addition, this guide focuses only on those functions users with BTRS Alerting licenses perform.

Deciding Which Book to Use

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

The *Alerting User Guide* provides information about daily BTRS use for users with BTRS Alerting licenses, including receiving alerts, accessing news and announcements, and updating your profile.

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	<p>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.</p> <p>Microsoft developed the term “Digital Dashboard” to reflect different areas and components of the page, similar to that of a car’s dashboard.</p>	<p>This term is used to represent two things:</p> <ul style="list-style-type: none"> • 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 <i>Document Library</i> or <i>Directory</i> dashboard. This guide also refers to this definition as “page” or “Web page.”

Microsoft® or technical term	Definition	What this means in BTRS
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.”
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 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.
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 scroll box to see different portions of the page that are not currently visible. Scrolling only changes what is displayed.
Select	<p>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.</p> <p>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.</p>

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.

Formatting Convention	Description
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.
<i>Italics type</i>	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.

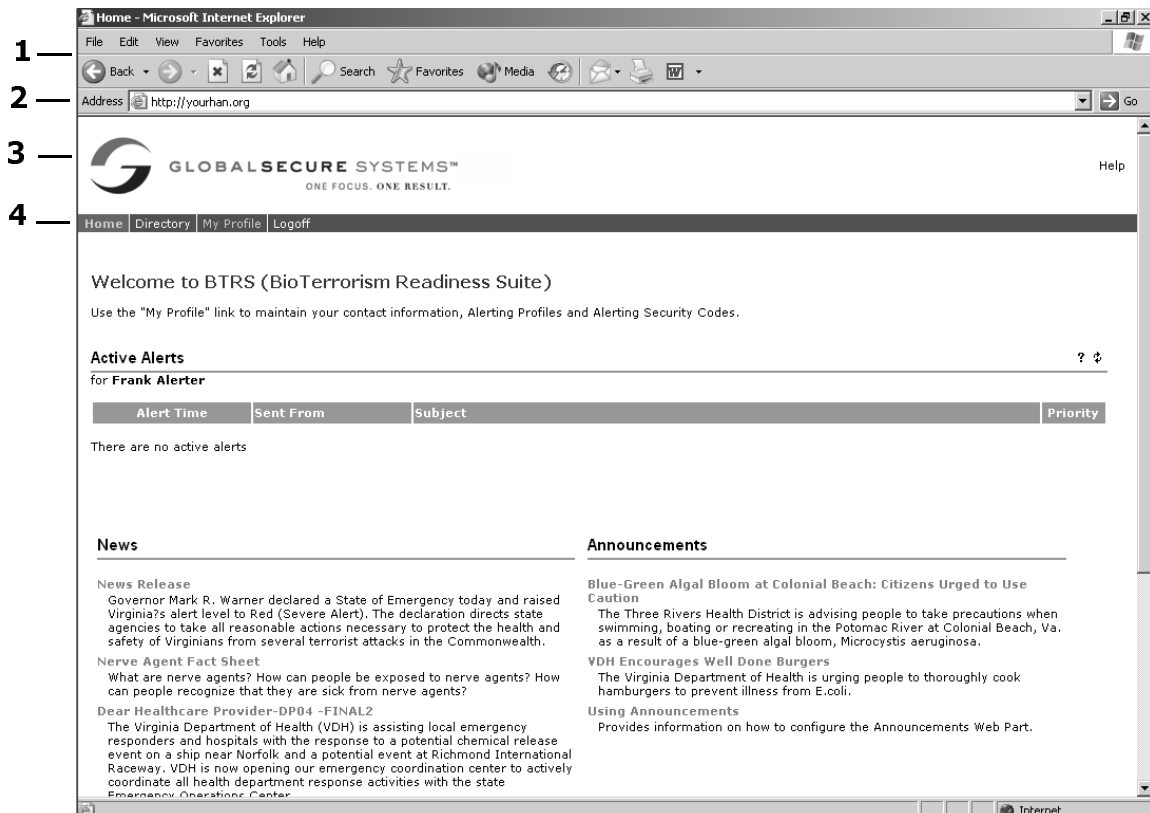


Caution - We tell you the dos and don'ts of working with BTRS to help you avoid damaging files or losing data. Often this information is essential to the completion of the task on which you are working.

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.

Number	Description
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.

2

Getting Started

Using the BTRS system is as easy as accessing the Internet. The BTRS portal is like any other Web site; once you access it, you can easily move about to view news, announcements, and alerts posted for your organization's use.

Before you get started using BTRS, take a moment to learn more about how BTRS security is set up. The BTRS system is used by many types of users, including those who create and manage user accounts, those who post and collaborate on documents, and those who use BTRS only to receive alerts. Each set of users may have different levels of access within the portal. When you're ready, log in to BTRS, and begin your adventures in the BTRS portal on the home page, which serves as the central area and starting point for many of the step-by-step instructions in this guide.

If you get stuck and cannot find the answer to a question either in this guide or in the online help, contact your organization's BTRS administrator.

Understanding Types of Users and Roles

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

If you are unsure what license and permissions you have been assigned, check with your BTRS administrator.

Types of User Licenses

Each BTRS user is assigned a particular type of user license when his or her account is created. Your BTRS administrator determines which license you receive – either BTRS Administration, BTRS Collaboration, or BTRS Alerting.

The following table shows the kinds of functions you can perform with each license:

What you can do	BTRS Administration	BTRS Collaboration	BTRS Alerting
Update your user profile	X	X	X

What you can do	BTRS Administration	BTRS Collaboration	BTRS Alerting
Update another user's profile	X		
Receive alerts	X	X	X
Send alerts	X	X	
Cancel alerts	X	X	
Read information and documents posted on the home page	X	X	
Use document collaboration tools (discuss, check-in/out or publish, and fax documents)	X	X	
View the role-based directory	X	X	X
Manage users, roles, role groups, and folders	X		
Generate reports	X		

Roles, Role Groups, and Organizational Units

In BTRS, each user can be assigned to one or more roles, and these roles may be assigned to one or more role groups within Organizational Units (OU). This enables you to save valuable time in emergencies by quickly receiving alerts that relate to the function(s) you perform. In addition, security and permissions in BTRS are often assigned to roles or role groups, rather than to individual users, to help administrators maintain an organized environment.

The following table briefly describes what roles, role groups, and OUs are, and how they function in BTRS.

This group	Denotes this
User	An individual user in BTRS (e.g., Peg Simpson)
Role	The function that one or more users perform (e.g. Peg Simpson and Jack Underhill both are assigned to the role Springfield Public Health Officers)

This group	Denotes this
Organizational Unit	<p>A way to organize one or more roles that fall under a single jurisdiction, or that work as a team (e.g., Epidemiologists, HAN Coordinators, and Emergency Services Coordinators who all work in Hudson County)</p> <p>For organizational purposes, this unit is often created to group roles working for the same organization or in the same area</p>
Role Group	<p>Several roles that can be assigned or collected into a single group (e.g., All workers in all roles in the city of Springfield, or all California HAN Coordinators)</p> <p>For alerting and security purposes, this unit is often created to group roles in similar job functions or locations</p>

Types of User Permissions

In addition to user licenses, BTRS administrators can also assign various security permission levels to each user account. These permissions can be assigned either to your role or role group. Therefore, when you use the BTRS portal, you may be able to see and access areas and items that other users cannot, and vice versa.

Role-based Permissions

Permissions assigned to your role can include the ability to:

- Receive alerts from other users
- Belong to one or more role groups

To help maintain a secure environment within the BTRS portal, most users do not work with role-based permissions; instead, these rights are generally handled by BTRS administrators.

Logging on to the BTRS Portal

To access the BTRS software, you must log on to a secure portal. You will need the following information from your BTRS administrator before you begin:

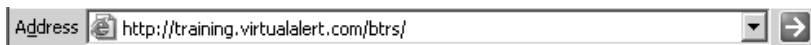
- The user name and password you will use to log on
- The Web address (URL) of your BTRS portal



The first time you log on to the BTRS portal, you need to complete your profile information. For more information, see “Logging on for the First Time” on page 19.

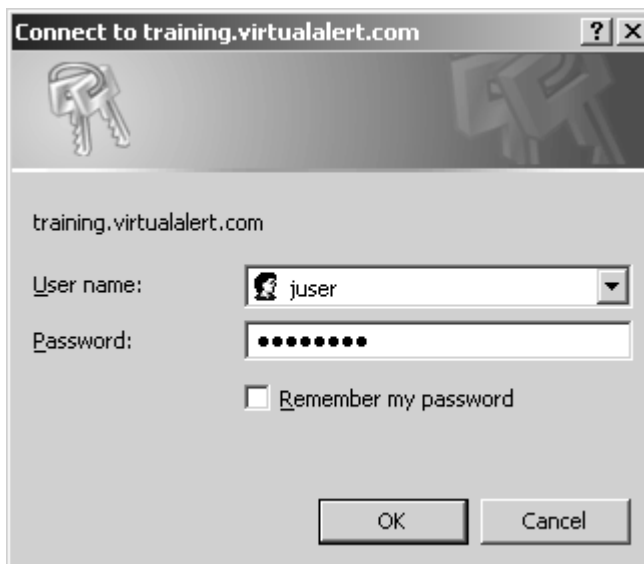
► To log on to the BTRS portal

- 1 Open Microsoft® Internet Explorer.
- 2 In the **Address** bar, type the Web address of your BTRS portal.



- 3 Press **ENTER** or click .

The *Connect to* dialog box opens.



- 4 In the **User name** field, type the user name provided by your BTRS administrator.

Your user name is case sensitive. Make sure it appears in the field exactly as it was given to you.

- 5 In the **Password** field, type your password.

Your password is case sensitive. Make sure it appears in the field exactly as it was given to you.

If you forget your password, contact your BTRS administrator.

You may change your password after successfully logging in for the first time. For more information, see “Changing Your Password” in Chapter 3, page 33.

6 Click **OK**.

The *Connect to* dialog box closes and the BTRS portal appears in your browser window.

Logging off of the BTRS Portal

When you are done accessing information through the BTRS portal, you may log off and close your browser window.

You may also choose to close the browser by clicking the X in the top right corner of the window; however, your session will not end until you have closed all browser windows.

► **To log off of the BTRS portal**

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

BTRS displays a message reminding you to close your browser window to complete the log off process.

2 Click **Logoff**.

Microsoft® Internet Explorer displays the message, “The Web page you are viewing is trying to close the window. Do you want to close this window?”

3 Click **Yes**.

The browser window closes.

Navigating through the BTRS Portal

One of the first steps toward becoming an experienced BTRS user is learning how to navigate through the BTRS portal. Several pages in the portal contain standard elements to help you become familiar with the format and layout of the pages, including the BTRS navigation bar and help functions. In addition, you can move between pages within the portal to return to a previous view easily using one of several methods.

Using the Navigation Bar

The BTRS navigation bar is the primary feature that enables you to quickly access all areas of the portal. On each page of the portal, the navigation bar provides links to other pages and sections.

Home | **Directory** | **My Profile** | **Logoff**

BTRS navigation bar

The area of the BTRS portal that you are currently viewing appears on the navigation bar in a different color. Clicking any of the navigation bar links takes you directly to that section's main page.

Using Bookmarks

You can create a bookmark to your BTRS Home page by logging into the Home page and using the “Add to Favorites” feature on your Browser.

Due to the security restrictions of a web portal, once you add the portal page to your favorites, you must enter the bookmarks properties and **delete any text** that appears after the .gov, .org, .com, etc.

For example: <http://www.microsoft.com/isapi/gomscom.asp?target=/> should be edited to say <http://www.microsoft.com>.

► To edit the bookmarks properties

- 1 From the **Favorites** menu in your browser, navigate to the Home page bookmark and right-click it.
- 2 From the sub-menu, select **Properties**.
The *Bookmark Properties* dialog box displays.
- 3 On the **Web Documents** tab, the URL field, highlight the Web address of the portal.
- 4 If anything appears after the .gov/.com/.org, etc. delete it.
- 5 Click **Apply**.
The browser saves the edit to the bookmark.
- 6 Click **OK**.

Moving between Pages

If you inadvertently access the wrong page or are finished viewing a page and want to return to the previous page you were viewing, BTRS does allow you to click Internet Explorer’s **Back** button to return to the previous page you were viewing.



Back button in the Internet Explorer window

Using Search

BTRS enables you to search for published documents, folders, and categories within your BTRS portal using both simple and advanced searches. Simple searches allow you to look for items by keyword. Advanced searches enable to add query elements such as data, author, title, file name, and category.

The BTRS Search bar appears on many pages in the BTRS portal, as well as the *Search* page. By default, the Search bar appears in simple search mode.



The Directory section of the BTRS portal uses a separate search function to locate users within the directory. For more information about this feature, see “Searching for Users in the Directory” on page 42.

Using Search Engine Parameters

Any search is only effective if you are able to locate the item you are looking for, and often, part of the reason you are searching is because you do not know when the item was created, what it is called, or what type of file it is. In these cases, you can use several different methods to locate what you are looking for.

While most search engines use similar methods to perform queries, the following table lists some common and basic search methods to help you locate folders, documents, and categories:

For example, type this	To do this
regional, director, meeting	Search for items that contain the words “regional,” “director,” <i>and</i> “meeting”
“regional director meeting”	Search for items that contain the phrase “regional director meeting”
regional or director or meeting	Search for items that contain the words “regional,” “director,” <i>or</i> “meeting”
*.doc	Search for all files with a .doc extension
reg*.doc	Search for all .doc file names that begin with “reg”

Performing Simple Searches

Using the simple search method allows you to look for items quickly, by entering one or more keywords that are a part of the item’s name.

You can perform a simple search either from the Search bar on any page in the BTRS portal, or by accessing the *Search* page.

► To perform a simple search

- 7 In the **Search** list, select **This Site**. Using the key in “Using Search Engine Parameters” on page 18, in the **for** field, type the word or words you want to use in the search.
- 8 Click **Go**.

BTRS searches for your terms. When the search is complete, BTRS displays the search summary and matching documents.

To organize your search results, follow the steps in “Viewing Search Results” on page 20.

Viewing Search Results

After you complete your search, you can organize the results list in several ways, including by date, title, author, and match ranking.

► To sort search results

- 1 Follow the steps in either “Performing Simple Searches” on page 15.
- 2 On the search results page, under Matching Documents, click one of the following:

Click this	To do this
Best Match	Sort matching documents starting with highest ranking match results
Author	List matching documents alphabetically by the first letter in the author's name
Title	List matching documents alphabetically by the title of the document
Date	Sort matching documents by the date last modified

- 3 To change the order the search results are listed in from ascending to descending, click the appropriate link again.

The triangle indicator switches from ▼ to ▲.

► Using Help

On each page of the BTRS portal, you can access online help that pertains to the topic you are working on. For example, if you click the **Help** link on the *My Profile* page, the help system opens to the “My Profile” section.

Elements of the Home Page

The BTRS home page contains several elements that provide you with a quick overview of current alerts, news, and events within your organization. These areas include:

- Active Alerts
- News
- Announcements



Because your BTRS portal can be customized so that it represents the needs of your organization, your portal pages might appear differently than those of another user, and from the graphics included in this guide.

Active Alerts

The Active Alerts section of the BTRS home page displays all active alerts sent to you, even if you have already confirmed the alert. Once the alert expires, the alert no longer appears on the page, even if you have not confirmed the alert.

▼ Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

To sort active alerts, click any column title. Clicking the date and time link for an active alert displays the alert's details, including time sent, the alert sender's name, the alert message text, and the alert's expiration time; you can also confirm receipt of the alert. For more information about receiving alerts, see "Using the Alerting System" on page 35.

News

The News section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization's current news. These items are posted and managed by users with rights to publish BTRS home page content.

Clicking any of the News links displays the contents of the article, or takes you to a designated Web page.

Announcements

The Announcements section of the BTRS home page displays documents posted to your BTRS portal that reflect your organization's current announcements, in the order they were posted. These items are posted and managed by users with rights to publish BTRS home page content.

Clicking any of the Announcements links displays the contents of the announcement, or takes you to a designated Web page.

3

Creating and Managing Your Profile

As a BTRS user, you need to create a profile that contains information about you, where you work, what type of work you perform, and how you want to be contacted in the case an alert is sent to you. In addition, you can set and update passwords and codes to log on to BTRS and to confirm alerts as part of your individual profile.

Keeping the information in your profile up-to-date is critical to the success of the BTRS alerting system. As phone numbers, e-mail addresses, and job locations often change, BTRS prompts you periodically to verify your information. In addition, you may receive e-mail reminders to change your password or update your profile if your BTRS administrator requires you to do so.

When your system or BTRS administrator initially creates your account, he or she may provide some or all of your profile information. When you log on for the first time, you need to confirm and/or complete the information in your profile so that other BTRS users in your HAN can contact you and send you alerts.

Logging on for the First Time

The first time you log onto the portal, you must verify and complete the information in your profile before continuing.

You will need to do the following to complete your profile:

- Verify and/or enter your profile information – see “Maintaining Your Profile Information” on page 19
- Set an alerting security code – “Using Alerting Security Codes” on page 24
- Create an alerting profile – “Using Alerting Profiles” on page 26

A separate page automatically appears to assist you in entering the information for each of these profile elements.

You can also change your password (see “Changing Your Password” on page 33) and set up your alert profile schedule (see “Scheduling Alerting Profiles” on page 30) after you complete your profile.

Maintaining Your Profile Information

Your profile is one of the most important elements of BTRS. Use the *My Profile* pages to enter information about you, including your background, and your work and home contact information. When you enter information in your profile, you can receive alerts from others in your alerting network. In addition, information you enter on this page appears

in the *My Directory* page so that others in your network with permissions can view your profile information to contact you.

When you complete and save your profile information, either for the first time or when you make changes, BTRS sends you an e-mail (to the e-mail address you specify) to confirm your changes.

Creating Your Profile

When you log on to BTRS for the first time or after not modifying your profile for 30 days, the *Profile Confirmation Required* page appears. Enter information on this page to complete or update your profile.

► To create your profile

- 1 Log on to the BTRS portal using the steps in “Logging on to the BTRS Portal” on page 12.

After you successfully log on, the *Profile Confirmation Required* page appears.

Home
Search
Categories
Document Library
Subscriptions
Alerts
Directory
My Profile
Logoff

Your password is set to expire in 5 days.

Actions

- ⚡ Back to BTRS Home
- Change My Profile
- Change My Alerting Profiles
- Change My Password
- Set My Alerting Security Code

Information

Profile Confirmation Required
Our records indicate that you have not changed your profile within the last 30 days.

Please verify that all information is correct and click **Save**.

* Indicates a required field

Prefix: Mr.

First Name: Jerry*

Last Name: Hernandez*

Business Category: ⌵

Professional Licenses: Educator
Environmental
Food/Nutrition
Law Enforcement
Medical Doctor

Specialties: Allergist/Immunologist
Anesthesiologist
Colon & Rectal Surgeon
Dermatologist
Emergency Physician

Organization:

Title:

Degrees:



Missing or incorrectly formatted information is highlighted in yellow on the *Profile Confirmation Required* page to assist you in locating errors.

- 2 Enter the following personal information:

In this field or list	Do this
Prefix	Select Dr. , Mr. , Ms. , or Mrs.

In this field or list	Do this
First Name	Type your first name <i>This is a required field</i> <i>The only special characters BTRS recognizes are apostrophe and hyphen. Accents and other characters used in user names are currently not supported.</i>
Last Name	Type your last name <i>The only special characters BTRS recognizes are apostrophe and hyphen. Accents and other characters used in user names are currently not supported.</i>
Main Business Category	Select the type of industry that you work in
Professional Licenses	Select one or more professional licenses that you hold <i>Press CTRL while clicking to select more than one type</i>
Specialties	Select one or more medical specialties you practice <i>Press CTRL while clicking to select more than one type</i>
Organization	Type the name of your organization
Title	Type your professional title
Degrees	Type any degrees that you hold

3 Enter the following Work Contact information:

In this field or list	Do this
Work Location	Type information about where you work, such as Building 1045, Intensive Care Wing, or Sacramento
Work Address	Type the address of the facility you work in
Work City	Type the name of the city in which your facility is located
Work State/Province	Select the state or province in which your facility is located

In this field or list	Do this
Work Zip/Postal Code	Type the ZIP or Postal code for the facility in which you work <i>You must enter 5-10 characters</i>
Work Email	Type an active work e-mail address <i>This is a required field</i> Enter the complete address; for example: joe_user@ca.gov or fred.smith@hospital.org
Work Phone	Type your work phone number, including area code and any extension <i>You must enter at least 10 digits</i>
Work Fax	Type your work fax number, including area code <i>You must enter 10 digits</i>

4 Enter the following Home Contact information:

In this field or list	Do this
Home Address	Type your home address
Home City	Type the name of the city in which you live
Home State/Province	Select the state or province in which you live
Home Zip/Postal Code	Type the ZIP or Postal code for the city in which you live <i>You must enter 5-10 characters</i>
Home Phone	Type your home phone number, including area code <i>You must enter at least 10 digits</i>

5 Enter the following Alternate Contact information:

In this field or list	Do this
Alternate Email	Type an e-mail address other than your work e-mail address Enter the complete address; for example: joe_user@ca.gov or fred.smith@hospital.org
Cell Phone	Type your cell phone number, including area code <i>You must enter 10 digits</i>

In this field or list	Do this
Alpha Pager	Type the e-mail address of your alpha pager Enter the complete address; for example: 6498511022@pagerco.net
Numeric Pager #	Type the phone number of your numeric pager <i>You must enter 10 digits</i>
Alternate Phone	Type a phone number other than that of your primary work, home, or cell phones, including area code <i>You must enter at least 10 digits</i>
Satellite Phone	Type the number of your satellite phone, including area code
Other Means of Contact	Provide information for any additional means people may use to contact you <i>This information can be an e-mail address, or a phone or fax number</i>

6 Enter the following Miscellaneous information:

In this field or list	Do this
Languages Spoken	Select one or more languages that you speak
CPR Certified	Select this check box if you are certified to perform cardio-pulmonary resuscitation (CPR)

7 Click **Save**.

The *User Profile Change Confirmation* page appears.

8 Click **OK**.

The *My Profile* page appears.

– or –

If you are logging on for the first time, the *Set My Alerting Security Code* page appears. Follow the steps in “Setting Your Alerting Security Code” on page 25 to set your alerting security code.

BTRS also sends you an e-mail to confirm the information you just entered.

Updating Your Profile Information

You can change your profile information at any time if your contact information changes, such as your office location, phone number, or e-mail address. In addition, if you do not make any changes to your profile, every 30 days BTRS will prompt you when you log on to verify your information and make any necessary updates. You may also receive an e-mail notification reminding you to log in and verify your profile information.

► To update your profile information

- 1 On the BTRS navigation bar, click **My Profile**.
The *My Profile* page appears and displays your current profile information.
- 2 Under Actions, click **Change My Profile**.
The *Change My Profile* page appears.
- 3 Using the steps in “To create your profile” on page 20 as a guide, make any changes to your profile.
- 4 At the bottom of the page, click **Save**.
BTRS displays the message, “Profile successfully changed!”
- 5 Click **OK**.
The *My Profile* page appears, and BTRS sends you an e-mail to confirm the changes you made.

Using Alerting Security Codes

The alerting security code is a four-digit number you enter to confirm an alert over the phone. When you receive an alert via a phone call at one of your designated phone numbers, you will be asked to enter this number to confirm your identity before the alert message will play.

Your alerting security code does not expire, but you can change the number at any time through the BTRS portal. You may also choose to have your BTRS administrator change your code for you.



Your alerting security code and your password (which you use to log into BTRS) have different values and are not used for the same purpose. For more information on passwords, see “Changing Your Password” on page 33.

Setting Your Alerting Security Code

As part of the profile confirmation process, the first time you log on to the BTRS portal, you will be prompted to create an alerting security code.

The screenshot shows the BTRS portal navigation bar with links: Home, Search, Categories, Document Library, Subscriptions, Alerts, Directory, My Profile, and Logoff. Below the navigation bar, a message states: "Your password is set to expire in 5 days." The main content area is divided into two columns: "Actions" and "Information".

Actions:

- Back to BTRS Home
- Change My Profile
- Change My Alerting Profiles
- Change My Password
- Set My Alerting Security Code**

Information:

Set My Alerting Security Code
Our records indicate that you have not set an Alerting Security Code!

You must set your Alerting Security Code before creating Alerting Profiles. An Alerting Security Code insures the delivery of secure alerts over automated voice systems. The Alerting Security Code entered must consist of exactly 4 numbers.

New Alerting Security Code:

Verify New Alerting Security Code:

Set My Alerting Security Code page

The *Set My Alerting Security Code* page only appears when you log on for the first time, after you complete the steps in “Creating Your Profile” on page 20. To change an existing security alerting code, follow the steps in “Changing Your Alerting Security Code” on page 25.

► To set your alerting security code

- 1 On the *Set My Alerting Security Code* page, in the **New Alerting Security Code** field, type the four-digit alerting security code you want to use.
- 2 In the **Verify New Alerting Security Code** field, reenter your alerting code.
- 3 Click **Save**.

The *Alerting Security Code Change Confirmation* page appears.

- 4 Click **OK**.

The *Create an Alerting Profile* page appears. Use the steps in “Creating Alerting Profiles” on page 27 to create your alerting profile.

Changing Your Alerting Security Code

You can change your alerting security code at any time to another four-digit number, either for security reasons, or if you’ve forgotten the number.

► To change your alerting security code

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

- 2 Under Actions, click **Change My Alerting Security Code**.

The *Change My Alerting Security Code* page appears.

- 3 In the **New Alerting Security Code** field, type the new four-digit alerting security code you want to use.
- 4 In the **Verify New Alerting Security Code** field, reenter your alerting code.
- 5 Click **Save**.

BTRS displays the message, “Alerting Security Code successfully changed for [your name]!”

- 6 Click **OK**.

The *My Profile* page displays, showing your current profile information.

Using Alerting Profiles

Depending on your organization’s alerting procedures and regulations, your organization may need to contact you with an alert at various times, even if you’re away from the office or at another location. After you set your alerting security code, you have the ability to create, edit, and activate several different alerting profiles to meet those needs. In addition, you can use the Alerting Profile Scheduler to set when each profile will be active.

About Alerting Profiles

Alerting profiles merely provide a way for you to tell BTRS how you want to be notified in case an alert is sent to you. BTRS allows you to create an automated list of contact methods, such as cell phone, e-mail, and pagers, for low, medium, and high profile alerts. In addition, you can specify which of those contact methods you want to use for each alert, based on the alert’s priority (low, medium, or high), and the order in which the alert is sent to each device.

You can create several different profiles that enable you to specify different scenarios for contacting you. For example, when you are at work, you may want to be notified of an alert through your work e-mail address and work phone. When you go home, however, or if you are called away from your office, you may opt to be notified through other methods, such as your home phone, cell phone, or pager. In addition, if you travel or plan a vacation, and will not be able to respond to alerts, you may want to create another profile that sends notifications to your work e-mail only, or does not notify you at all. By creating several alerting profiles, you need only to change your active alerting profile and designating times when each is active, you can automatically receive alerts at the proper location, 24 hours a day, 7 days a week.

Creating Alerting Profiles

The first time you log on to BTRS, you are prompted to create an alerting profile as part of the profile confirmation process. In addition, you can create additional profiles at any time. Creating an alerting profile enables your organization to alert you using the methods you designate. You can also set an alerting schedule that employs the profiles you create.



You may opt to not create an alerting profile when you first log on to BTRS. If you do not create any alerting profile, you will still receive an e-mail each time an alert is sent to your role.

► To create an alerting profile

- 1 On the BTRS navigation bar, click **My Profile**.

– or –

If you are logging on for the first time, after completing the steps in “To set your alerting security code” on page 25, skip to step 4.

The *My Profile* page appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change the Alerting Profiles* page appears.

Home Search Categories Document Library Subscriptions Alerts Directory My Profile BTRS Admin Logoff	
Your password is set to expire in 5 days.	
Actions Back to BTRS Home <ul style="list-style-type: none"> Change My Profile Change My Alerting Profiles Change My Password Change My Alerting Security Code 	Information <hr/> <p>Create an Alerting Profile Our records indicate that you have not set up an alerting profile!</p> <p>Your alerting profile contains the preferred methods of contact in the event an alert is sent to you. Click New button to create an alerting profile.</p> <p>Default Alerting Profile: (none)</p> <div style="border: 1px solid black; height: 50px; width: 200px; margin: 10px auto;"></div> <p style="text-align: center;"> <input type="button" value="Set as Default"/> <input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Scheduler"/> </p>

If you are logging on for the first time, the *Create an Alerting Profile* page appears after you complete the steps in “To set your alerting security code” on page 25.

- 3 Click **New**.

The *Profile Name* page appears.

- 4 In the **Profile Name** field, type the name you want to give your alerting profile.

Create a name that accurately reflects the purpose of the profile, such as “daily,” “weekend,” “on call,” or “vacation.”

- 5 To set this as your default profile profile, select the **Set as default** check box.
- 6 Under High Priority Alerts, in the **Location** lists, select one or more contact devices you would like BTRTS to send alerts to when high priority alerts are sent to you.

When an alert is sent to you, the device you select in the **Location 1** list will be contacted first; the device in the **Location 2** list will be contacted second, etc.



If you create and set as default an alerting profile in which you select **(none)** for all locations, you will *only* receive alerts on the BTRTS portal.

If you are logging on for the first time, you can now continue to the portal home page. Under Actions, click **Back to BTRTS Home**.

- 7 Repeat step 6 for the Medium and Low Priority Alerts sections.
- 8 Click **Save**.

The *Change My Alerting Profiles* page appears and displays the profile you created. You can assign the days and times you want the profile to be active, otherwise, BTRTS activates your default profile.

Editing Alerting Profiles

You have the option at any time to edit your alerting profiles by changing how you want to be contacted for one or more alerting priorities.

► To edit an alerting profile

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* page appears.

- 3 Select the alerting profile that you would like to change.

- 4 Click **Edit**.

The *Profile Name* page appears, and displays the profile's current information.

- 5 Make any necessary changes to your alerting profile.

- 6 Click **Save**.

BTRS saves your changes and displays the *Change My Alerting Profiles* page.

Deleting Alerting Profiles

When you no longer need to use a particular alerting profile, you can delete it so that it no longer appears in the alerting profile list. Deleting an alerting profile also removes it from your Alerting Profile Schedule.

► To delete an alerting profile

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* page appears.

- 3 Select the alerting profile that you would like to delete.

- 4 Click **Delete**.

BTRS displays the message, "Are you sure you want to delete [name of alerting profile]?"

- 5 Click **OK**.

The alerting profile is removed from the alerting profile list.

Scheduling Alerting Profiles

BTRS automatically activates alerting profiles using the days/times you specify in the Alerting Profile scheduler. During days/times that no profiles are scheduled to be active, your default profile will be activated. If you choose, you can opt to not use the Scheduler, and merely set a different default profile as necessary. BTRS sends alerts to the devices you select based on your active alerting profile.



If you choose to use the Alerting Profile Scheduler, BTRS will continue to automatically activate the alerting profiles you include until you remove them from your schedule.

► To set your alerting profile schedule

- 1 Use the steps in “To create an alerting profile” on page 27 to create one or more alerting profiles.
- 2 On the *Change My Alerting Profiles* page, click **Scheduler**.

The *Change Alerting Profile Schedule for [name of user]* window opens.

Change Alerting Profile Schedule for Jerry Hernandez

Show Instructions

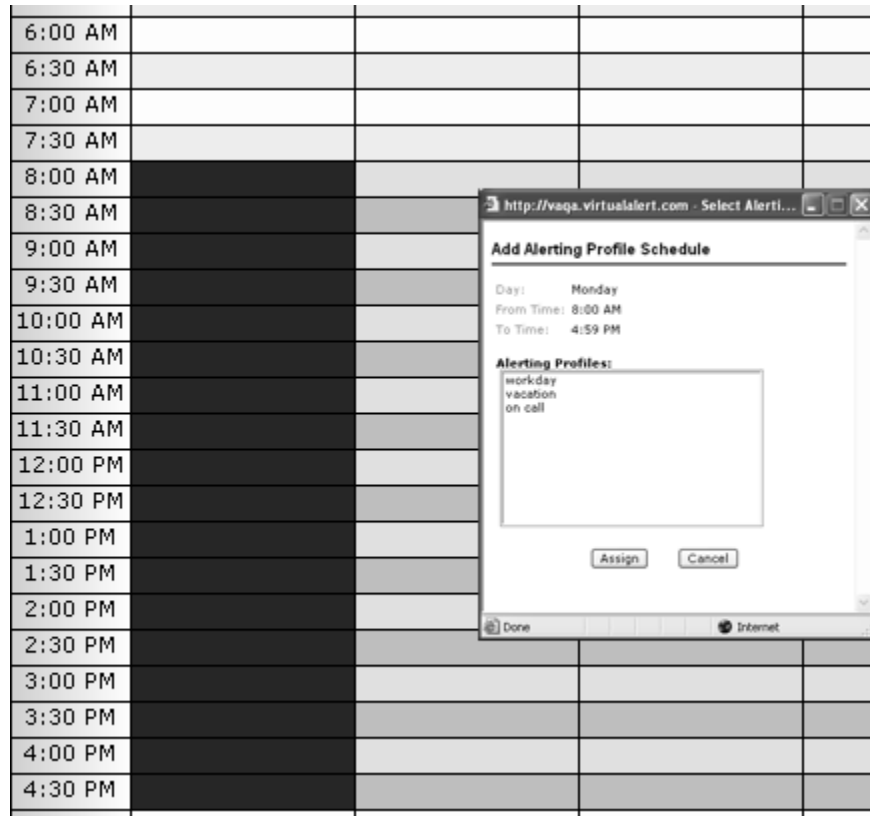
	Monday	Tuesday	Wednesday	Thursday	Friday
0:00 AM					
0:30 AM					
1:00 AM					
1:30 AM					
2:00 AM					
2:30 AM					
3:00 AM					
3:30 AM					
4:00 AM					
4:30 AM					
5:00 AM					
5:30 AM					
6:00 AM					
6:30 AM					
7:00 AM					
7:30 AM					
8:00 AM					
8:30 AM					
9:00 AM					
9:30 AM					
10:00 AM					
10:30 AM					
11:00 AM					
11:30 AM					
12:00 PM					

Change Alerting Profile Schedule window

- 3 Place your cursor over the day/time you want to activate an alerting profile, then click and drag to the time you want to deactivate the profile.

You can change the time period during which the profile is active at any time.


The *Add Alerting Profile Schedule* dialog box opens.



Add Alerting Profile Schedule dialog box

- 4 In the **Alerting Profiles** list, select the profile you want to activate for this time period.
- 5 Click **Assign**.

The *Add Alerting Profile Schedule* window closes, and the profile name appears on the schedule.

7:00 AM				
7:30 AM				
8:00 AM	 X			
8:30 AM	Profile Name: workday			
9:00 AM				
9:30 AM				
10:00 AM				
10:30 AM				
11:00 AM				
11:30 AM				
12:00 PM				
12:30 PM				
1:00 PM				
1:30 PM				
2:00 PM				
2:30 PM				
3:00 PM				
3:30 PM				
4:00 PM				
4:30 PM				
5:00 PM				

Change Alerting Profile Schedule window, with profile added

- 6 Repeat steps 3-5 to assign additional times.
- 7 To close the *Change Alerting Profile Schedule* window, click the **X** in the upper right corner of the window.

► **To edit your alerting profile schedule**

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

- 2 Under Actions, click **Change My Alerting Profiles**.

The *Change My Alerting Profiles* page appears.

- 3 Click **Scheduler**.

The *Change Alerting Profile Schedule for [name of user]* window opens.

- 4 Perform one or more of the following functions.

To do this	Do this
Move an existing scheduled block	Place your cursor over the header of the block, then click and drag to the desired time period.
Change the hours assigned to an existing scheduled block	Place your cursor over the top or bottom border, then click and drag to adjust the time period.

To do this	Do this
Remove an existing scheduled block	Click the X in the upper right corner of the block
Assign a different profile to an existing scheduled block	Select the block, then click to display the View/Edit Alerting Profile Schedule window – or – click the [icon graphic] in the header of the block

- 5 To close the *Change Alerting Profile Schedule for [name of user]* window, click the **X** in the upper right corner of the window.

Changing Your Password

When your BTRS administrator creates your user account, he or she assigns a user name and password that you use to log into BTRS. Although your user name cannot be changed, you can change your password after you log on for the first time.

Before changing your password, be sure that you follow your organization's security guidelines or requirements for your password. Check with your BTRS administrator if you have any questions.

After you change your password successfully, BTRS requires you to log in using your new password.



Your password is not the same as your alerting security code, which is the four-digit number you use to identify yourself on the phone when you receive an alert. For more information on alerting security codes, see “Setting Your Alerting Security Code” on page 25.

► To change your password

- 1 On the BTRS navigation bar, click **My Profile**.

The *My Profile* page appears.

- 2 Under Actions, click **Change My Password**.

The *Change My Password* page appears.

- 3 In the **Current Password** field, type your existing password.

- 4 In the **New Password** field, type the new password you want to use.
- 5 In the **Verify New Password** field, reenter your new password.
- 6 Click **Save**.

BTRS displays the message, “Are you sure you want to change your password?”

- 7 Click **OK**.

BTRS displays the message, “Password successfully changed!”

- 8 Click **OK**.

The *Connect to [BTRS portal URL]* dialog box displays.

- 9 Using your new password, log on to the BTRS portal.

4 Using the Alerting System

The alerting feature in BTRS provides a powerful and efficient method to receive information about important events in your area. Alert messages can be sent to users' e-mail addresses, phones, fax numbers, and/or alpha pagers.

Receiving and confirming alerts is simple and takes only a few moments to do. You can choose how you are alerted so that you don't miss any critical information.

Viewing Active Alerts

For more information about setting and modifying your alerting profile, see "Using Alerting Profiles" in Chapter 3, page 26.

When an alert is sent, you can be contacted in one of three methods:

- Through the devices you specify in your active alerting profile
- Through your work fax only
- Through your work e-mail only

In addition, the alert is always posted on the BTRS portal for the duration of the alert, even if you have already confirmed receipt of the alert.

Viewing Active Alerts on the BTRS Home Page

The BTRS home page displays all active alerts sent to you by another user. In addition, you can view the alert's priority, the name of the user who sent the alert, and the subject of the alert. All alerts remain on the BTRS home page for the duration of the alert (determined by the user sending the alert), even if you have already confirmed the alert through any device (phone, e-mail, portal, etc.).

▼ Alert Time	Sent From	Subject	Priority
8/24/2004 1:43:23 PM	Chris Edwards	Investigation Results	Medium

Active alert on the BTRS home page

Viewing Active Alert Details

From the BTRS home page, you can view additional information about an alert by clicking the date and time link in the **Alert Time** column. Doing so displays the *Alert Details* page.

By default, alerts appear in the order sent to you. To sort the alerts in ascending order by sender or subject, click the column once. To sort the

results in descending order, click the column again. An arrow appears next to the column's title to indicate the order in which the alerts are sorted.

The *Alert Details* page displays detailed information about the alert, including the date/time the alert was sent, the date/time the alert will expire, the name of the alert sender, the text of the alert message, the alert's status, and the roles, role groups, and/or selected users notified. You can also listen to recorded messages the sender included with the alert.

► **To view the details of an alert you received**

- 1 On the BTRS home page, in the **Alert Time** column, click the link that contains the date and time for the alert you want to view.

The *Alert Details* page appears.

- 2 Perform one or more of the following functions:

Click this	To do this
Back to previous view	Return to <i>View My Sent Alerts</i> page
Confirm Receipt of Alert	If you haven't already done so, confirm that you have received the alert
email address link	Send an e-mail message to the alert sender (only if Enable Signature was selected for the alert)
recorded message link	If included, listen to an attached .wav file
View	Display the list of each role and/or role group you sent the alert to (only if alert was sent by role)



If an alert recipient confirms an alert via email by clicking "Reply", there could be a delay between his/her actual confirmation and BTRS's receipt of the confirmation, depending on the speed of the user's email provider. Once BTRS receives the alert confirmation email, it will update the confirmation information.

Confirming Receipt of Alerts

For more information about creating and activating alerting profiles, "Using Alerting Profiles" in Chapter 3, page 26.

You can confirm alerts sent to you through one of several methods: e-mail, telephone, or the BTRS portal, depending on which devices you include in your active alerting profile. BTRS sends notifications to each device based on the order you select in your alerting profile.



In the case that a Work Fax or Work Email Only alert is sent, only your designated fax number or e-mail address will receive notification.

While BTRS will only send one notification to each e-mail account in your active alerting profile, BTRS will keep sending notifications to the phone numbers until you confirm an alert. The person sending the alert determines how many times BTRS will notify you during an alert. So, you may receive several notifications at the same phone number. After you confirm that you have received the alert, using any method, any other scheduled notifications are discontinued.



If you confirm an alert via email by clicking "Reply", there could be a delay between your actual confirmation and BTRS's receipt of the confirmation, depending on the speed of the user's email provider. Once BTRS receives your alert confirmation email, it will stop sending you notifications.

If you are unable to confirm an alert through any device, your BTRS administrator can confirm the alert for you. Contact your BTRS administrator for more information.

The user who sends the alert can view the progress of the alert at any time on the *My Sent Alerts* or *Alert History Log* pages, including both the details of which devices your alert was sent to, as well as the time and method of your confirmation.



To verify that you have confirmed receipt of an alert, click the **Date/Time Sent** column either on the BTRS home page or on the *Alerts* page to display the *Alert Details* page. If the **Confirm Receipt of This Alert** link displays at the top of the page, you have not yet confirmed the alert.

Confirming Alerts through the BTRS Portal

You can choose to confirm an alert through the BTRS portal in one of two ways – either on the BTRS home page, or from the *Alerts* page.

► To confirm receipt of an alert on the BTRS home page

- 1 On the BTRS home page, click the **Date/Time** link for the alert you want to confirm.

The *Alert Details* page appears.

Alert Details[Back to Previous View](#)[Confirm Receipt of Alert](#)**Investigation Results**

Medium

Time Sent: 8/24/2004 1:43:23 PM
Expires: 8/24/2004 2:43:23 PM
From: Chris Edwards
Message: Investigation results for the 4/27 ecoli case are available for review in the Ecoli Workgroup folder.
Status: Pending

Roles Activated: [View Roles Notified](#)
 (1 roles)

- 2 At the top of the page, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the page.

► **To confirm receipt of an alert on the Alert Details page**

- 1 On the BTRS navigation bar, click **Alerts**.

The *Alerts* page appears.

- 2 Under Active Alerts, in the **Alert Time** column, click the date and time link of the alert you want to confirm.

The *Alert Details* page appears.

- 3 At the top of the page, click **Confirm Receipt of Alert**.

The alert is confirmed, and the Confirm Receipt of Alert link no longer appears on the page.

Confirming Alerts via Telephone

If you elect to have an alert sent to any standard telephone or cellular phone, you can confirm receipt of the alert from your phone without logging in to BTRS. Depending on settings determined by your BTRS administrator, you may receive up to 10 calls at each phone number for each alert, until you confirm the alert.



If a Work Fax or Work Email Only alert is sent to you, you will not receive telephone calls, even if you have entered phone numbers in your alerting profile.

► **To confirm an alert via the phone**

- 1 Upon answering your phone, listen to the automated greeting.
- 2 Press any key on your phone to continue.

For more information about setting and changing your alerting security code, see "Using Alerting Security Codes" in Chapter 3, page 24.

- 3 When prompted, enter the four-digit security code you created as your alerting security code.
- 4 After successfully entering your code, listen to the alert message.

– or –

If you are unable to enter your code, or if you enter an incorrect code, the prompt repeats.

After three unsuccessful entries, BTRS disconnects.

- 5 When you have listened to the entire alert message, press **1** on your phone to confirm the alert, or **2** to repeat the message.

Confirming Alerts via E-mail

If you elect to have an alert sent to your e-mail address, you can confirm the alert via the e-mail message, using either of two methods:

- Clicking the confirmation link in the email
- Replying to the email

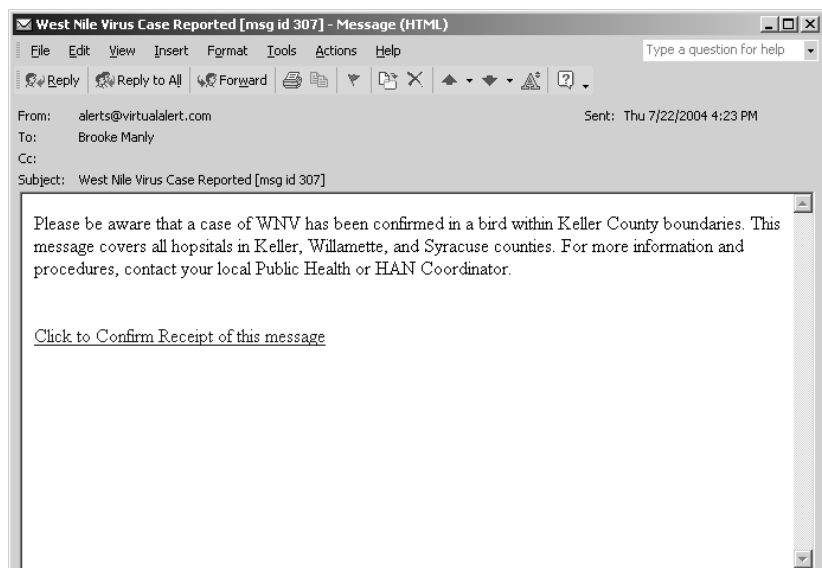


If a Work Fax Only alert is sent to you, you will not receive an e-mail, even if you have entered e-mail addresses in your alerting profile.

► To confirm an alert using the "Click to Confirm" link

- 1 Upon opening the e-mail message, review the alert message in the e-mail.

The e-mail displays the subject, including the message ID number, and message of the alert. To view the name of the alert sender, you need to review the information on the BTRS home page or on the *Alerts* page.



- 2 At the end of the alert message, click the **Click to Confirm Receipt of this message** link.

If you are not currently logged in to your BTRS portal, you are prompted to log in to BTRS.

After you successfully log on, BTRS displays the message, “Alert confirmed as received.”

► **To confirm an alert by replying to the e-mail**

- 1 Upon opening the e-mail message, review the alert message in the e-mail.

The e-mail displays the subject, including the message ID number, and message of the alert. To view the name of the alert sender, you need to review the information on the BTRS home page or on the *Alerts* page.

- 2 In the email interface, click **Reply**.

The email program generates a reply email.

- 3 If the subject for the reply email does not include the message **ID number** of the original alert email, type it in the **Subject** field.

You must type the message ID in the following format (brackets included): [id:####]

- 4 In the **Subject** field, after the message ID number, type **Confirm**.



Any emails that do not include a correct message ID number and the correctly spelled word “Confirm” will not register with BTRS as confirmations.

- 5 In the email interface, click **Send**.

Your email program sends the email. When BTRS receives your reply, it marks the alert notification as confirmed and halts all other attempts to contact you.



If you confirm an alert via email by clicking “Reply”, there could be a delay between your actual confirmation and BTRS’s receipt of the confirmation, depending on the speed of the user’s email provider. Once BTRS receives your alert confirmation email, it will stop sending you notifications.

5 Using My Directory

The Directory section of the BTRS portal enables you to view, search for, and export other BTRS users' contact information. Because each BTRS user must update the information in his or her profile at least every 30 days, you can rely on the fact that the contact data in the directory is up-to-date. You can use this information to e-mail or fax items that BTRS does not, or to update your organization's contact database in other applications, such as Microsoft® Excel and Outlook®.

Depending on which data other users enter about themselves, you may be able to view the following information about each user:

- Name
- Title
- Organization name
- Type of industry user works in
- What languages the user speaks
- Roles the user is assigned to
- Contact information:
 - e-mail address
 - Work phone number
 - Fax number



All other information in that user's profile appears as **(private)**.

In addition to locating user information using the directory tree view, you can also search for individual users' contact information, and copy directory information into other applications.

Using the Directory Tree View

For more information about what roles and OUs are, see "Roles, Role Groups, and Organizational Units" in Chapter 2, page 10.

The directory tree organizes user information by each role and Organizational Unit (OU) created in your BTRS portal. The name of each OU appears in bold, with an icon () to the left. All roles appear in the tree as links; clicking the link displays each user in that role and the associated contact information.

► **To view users in the Directory Tree**

- 1 On the BTRS navigation bar, click **Directory**.

The *My Directory* page appears.

- 2 In the left pane, on the **Directory Tree** tab, expand the tree to locate the role for which you want to view user information.

You can also search for users. For more information, see “Searching for Users in the Directory” on page 42.

- 3 Click the link for any role to display contact information in the right pane.

Searching for Users in the Directory

In addition to viewing users in the directory tree by role, you can search for individual users using other criteria, including the user’s name, the company he or she works for, or the city in which he or she works. For example, you can perform a search to look for all users who work in Los Angeles, or whose title is HAN Coordinator.

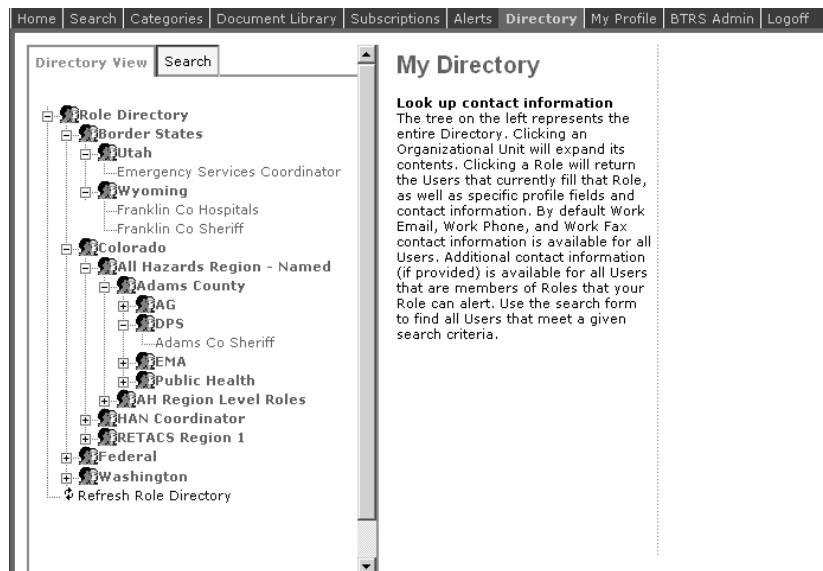


Search results only display information entered by other users that you have permission to view.

► **To search for users in the directory**

- 1 On the BTRS navigation bar, click **Directory**.

The *My Directory* page appears.



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

Directory View Search

Field: Name

Criteria: Contains

Text:

search

3 In the **Field** list, select one of the following:

Select this option	To search by
Name	The user's name
Title	The user's job title
Organization	The name of the organization the user works for
Business Category	The category of business the user selected in his or her profile
Prof. License	A professional license the user holds
Specialty	The specialty the user selected in his or her profile
Spoken Languages	A language the user speaks
Work Location	The user's job location
Work City	The city in which the user works

4 Based on the selection you made in step 3, in the **Criteria** list, select one of the following:

Select this option	To search for
Contains	Words that contain the letter, word, or phrase you enter in the Text field
Equals	Words that appear exactly as you enter in the Text field
Begins with	Words that begin with the letter or letters you enter in the Text field

Select this option	To search for
Ends with	Words that end with the letter or letters you enter in the Text field

- Based on the selection you made in step 3, in the **Text** field, type the letter, letters, word, or phrase you want BTRS to search for in the directory.

- Click **search**.

The results of your search display in the right pane.

To view more of the right pane, place your cursor on the scroll bar between the left and right panes, then click and drag the scroll bar to the left.

Home Search Categories Document Library Subscriptions Alerts Directory My Profile BTRS Admin Logoff

Directory View Search (1 Users returned)

* denotes alertable roles.

Name	Title	Organization	Bus.Category	Languages Spoken	Roles	Contact Information
Frank DePalma	Sheriff	Adams County Sheriff	Public Health	-	Adams Co Sheriff*	Email Address: depalmafr@dle.co.us Work Phone: (302) 451-1600 x301 Fax: (302) 451-1601

Exporting Directory Information

After performing a search or locating users within a role, you can quickly create a Microsoft® Excel spreadsheet or a table in Microsoft® Word that contains all user information displayed on the page.

► To copy user information to a spreadsheet

- On the *Directory* page, select all the text you want to insert into the spreadsheet (or you can quickly select all text on the page by pressing **CTRL + A**).
- Right-click the selected text, and click **Copy** (or press **CTRL + C**).
- Open a new or existing document in Microsoft® Excel or Word.
- Place your cursor at the location in the spreadsheet or document where you want to insert user information.
- On the **Edit** menu, click **Paste** (or press **CTRL + V**).

The text from the *Directory* page appears in the document or spreadsheet.

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.

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).

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.

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.

F

form see **page**.

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.

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.

profile (portal) Information about individual documents that are uploaded into BTRS. See also **My Profile**.

R

role A position within an Organizational Unit (OU) that consists of one 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.

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.

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