ACCOUNT NETWORKS USER GUIDE

inform • manage • respond

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Overview

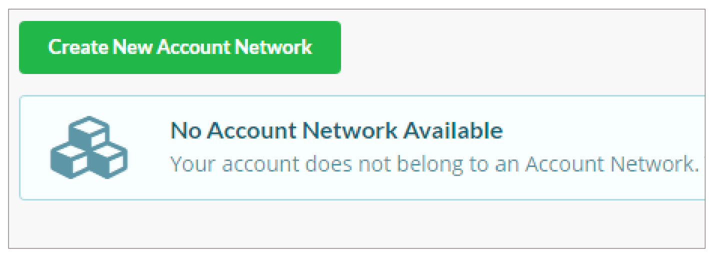
Accounts and Account networks provide the foundation for the EmergHub system. Each individual user of the platform must belong to an account (whether it be one user per account or a multi-user account), and each of these accounts must be a part of an account network, which can contain either a single account or many different accounts.

There are also different roles and permissions that must be applied to users to give them varied access within the platform to maintain security and order. You are able to set up different sets of permissions and assign them once a user has been created within an account. Account network creation and administration is typically reserved for management-level users in the system using the network's master account.

Account Network Homepage

To access the Account Network homepage after creating and accessing your EmergHub account for the first time, you must navigate to the top right-hand corner of your screen where you will find your account ID number. Clicking on this number will cause a sidebar to appear from the right side of the screen. The last option in this sidebar is Account Network. Clicking this will lead you to the Account Network homepage
On the Account Network homepage, you are able to:

1 Create a New Network



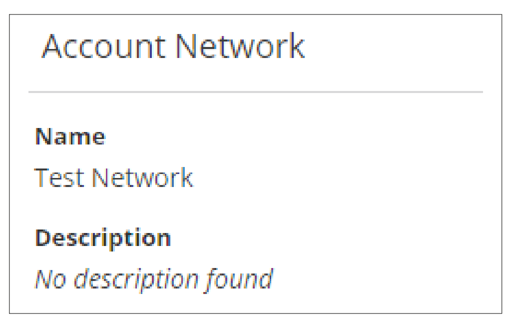
If you are not currently part of an account network, you will have to create one on the Account Network homepage. There will be a green Create New account Network button at the top of the homepage on the left-hand side.

Clicking this button will cause a pop-up window to appear where you have the ability to name the network before being redirected back to the homepage.

[**Note:** In order to become part of an existing account network, a user of that network with sufficient permissions will have to create a new user and/or account from within that account network.]

2 View Your Network Name and Description

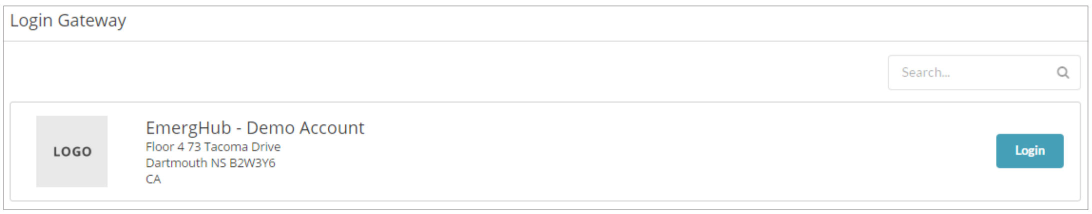
Once you are a part of an account network, when you arrive on the Account Network homepage you will no longer see the green Create New Account Network button. Instead, you will be able to view the name and description (if available) of the network you belong to.



3 Access Login Gateway

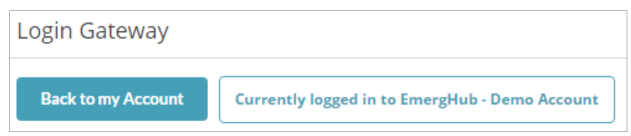
The Login Gateway is the second section appearing on the Account Networks homepage that is only viewable after you are part of an account network. Here, you are able to see any other accounts that your user ID is allowed to access. If there are no accounts listed in this section, you do not have the required permissions needed to access any accounts but your primary one. Refer to page 12 for more information on application role mappings.

Should you have the appropriate permission to access a secondary account, you will see a blue Login button appearing to the right of any secondary account information in this section which, when clicked, will direct you to the main dashboard for that account.



Search for a specific secondary account you have access to by using the search bar located at the top right of the section. Type in the name of the account you are looking for and the results in this section will filter to match the typed text.

[**Note:** To return to your primary account, re-enter the Account Networks homepage through the Account ID menu at the top right corner of your screen. You will see a blue Back to my Account button below the Login Gateway header that you can click to return to your primary account.]



[**Note:** It is not possible for a user to have access to accounts that belong to different account networks. All accounts a user can have access to must be part of the same network.]

Accounts

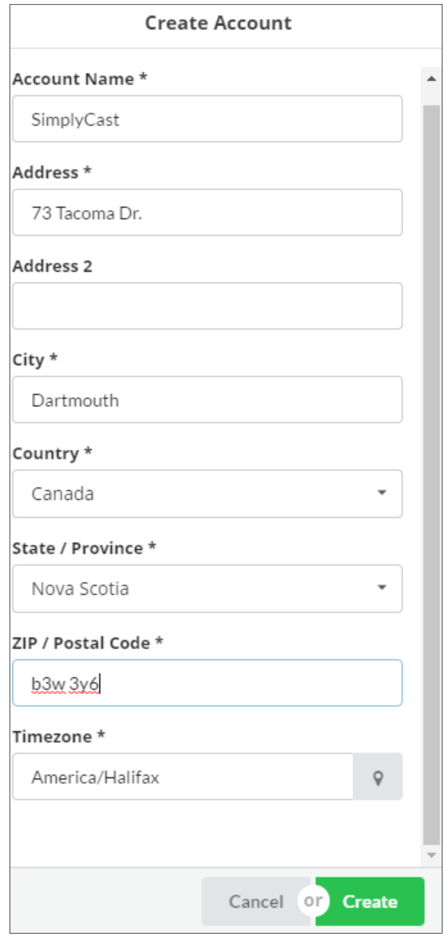
In the menu that appears on the left side of the screen while on the Account Networks homepage, you will see the Account Networks section at the bottom with five sub-categories within the section. The first of these sub-categories is Accounts. Clicking on this option will direct you to the page where you are able to view all of the accounts belonging to the current account network.

On this page you can:

1 Create a New Account

Accounts are the essentially the workspace in which users are able to create, edit, save, share, or delete projects and information. Accounts can contain either a single user or they can accommodate multiple users, each with their own email login but the same account ID number.

To create a new account:



- Locate the green Create New Account button appearing at the top of the Accounts page, Clicking this button will cause a sidebar to appear from the right side of your screen
- The first field in this sidebar is where you must provide a name for the account. This name may be the name of the account user, or if multiple users will belong to the account the name could be the group, company, or role of the users. This is a required field
- The next two fields in the sidebar are where you must enter an address for the account. The first Address field is required
- The fourth field in the Create Account sidebar is where you must enter a city for the account. This field is required
- In the next field, you are required to choose your country from the dropdown list of options provided. Then, depending on the country selected, the next field will become enabled, asking for the state or province you are located in
- The second last field you must fill out in order to create a new account is the ZIP/Postal Code field
- You are required to choose the time zone the new account will adhere to in the sidebar's last field. Clicking the field will open up a map of the world where you can click on the region you belong to. Or, simply type out the name of your city in the field provided below the map and click the blue OK button to select the appropriate time zone
- When you have finished filling out the required information in the Create Account sidebar, click the green Create button located at the bottom to create the account and have it appear in the list on the accounts page, or click the Cancel button to close the sidebar without creating the account

2 View the List of Accounts

When entering the Accounts page, you should immediately see a list of all the accounts that form part of the account network with the most recently created account at the top of the list. If there are no accounts in the list, you have not yet created any.

For each account in the list you will be able to see four items of information associated with the account:

- **Image/Logo:** This is an image (if available) that has been associated with the account. An image can be added or changed by editing the account
- **Account Name:** This is the name that was given to the account upon its creation
- **Account Address:** This displays the address provided for the account upon its creation
- **Edit Button:** This is a blue button that appears at the right side of each account that can be clicked to enter the account's profile where changes can be made. Refer to page 6 for more information

3 Navigate Multiple Pages of Accounts

If there are many accounts in the network, they will be displayed on multiple pages in the Accounts section. To view an account that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of accounts that have been created. Proceed to another page of accounts by clicking either the page number you would like to visit, or the Next button which will take you to the next page of accounts. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many accounts to display at a time by clicking on the “Showing...” link located to the right of the number of displayed accounts.

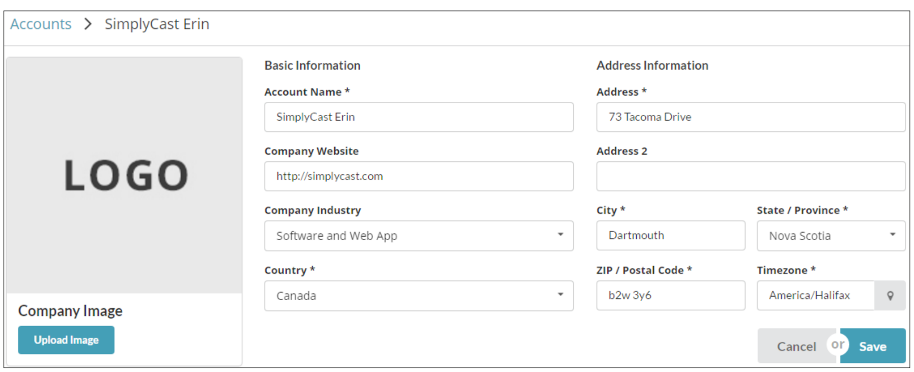
4 Search Accounts

If you are trying to find a particular account belonging to the account network, you can simply use the search bar located at the top right of the screen above the list of all the accounts on the Accounts page. As you type in the name of the account you are searching for, the results will automatically be filtered to show the matches to the typed-in text.

5 Edit an Account

To edit the information for a particular account within the account network, locate the blue Edit button found at the right side of the account information on the Accounts page. Clicking the button will direct you to the account profile page.

In the top section of this page, you are able to modify any of the information fields that were filled out upon account creation, from the basic information to the address information. You are also able to upload an image to use for the account.



Upload an Image

To upload an image:

- Locate the blue Upload Image button found below the image square on the left side of the account profile page. When clicked, an File Upload pop-up window will appear where you can choose an image that has already uploaded to the server, or upload a brand new image
- If you see the image you would like to use in this list, click on it and then click Select in the bottom right-hand corner of the pop-up to continue the process of adding it to your account profile

- If you do not see an image you would like to use or there are no images to choose from, click on the green Upload button found at the top of the pop-up, which will open another pop-up where you are able to search through your device to choose an image to upload. Once you have found an image, click the Open button at the bottom right of the pop-up to add the image to the list in the Image Finder window
- Use the Refresh button located to the right of the Upload button at the top of the Image finder window to refresh the list of images if new ones have been added
- The Settings button next to the Refresh button at the top of the window will display some organizational options when clicked. You are able to choose whether to view added images in thumbnail or list view, determine what information to display with each image (Name, Size, and/or Date), whether they will be ordered by image name, type, size, or date, and whether or not the images are displayed in descending order

[**Note:** In the section on the left side of the Image Finder window, you will see an Images folder. By default, all added images will be placed in this folder, but for organizational purposes, you are able to create subfolders by right-clicking on the folder and selecting the Add New Subfolder option. You are able to create as many subfolders as you like.]

Users

The second section in the account profile is the Users section, where you are able to see a list of all the users who have access to this account. If there are no users visible in this section you have not created any yet. For each user in this list you will see their name, profile image (if available), as well as any personal contact information available.

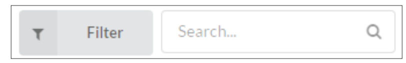
To create a new user for the account:

- Locate the green Create New User button found at the top left corner of the Users section on the Accounts page. When clicked, a sidebar will appear from the right side of your page containing three fields
- The first field you must fill out is the new user's email address that they will use to log in to the system
- The next two fields are the new user's first and last name which must be filled out to create the new user profile
- Click the green Create button at the bottom of this sidebar to complete the creation of the new account user, or click Cancel to close the sidebar without creating a new user

[**Note:** Once the user is created, a confirmation email will be sent to the email address that was used upon the creation of this user including a link to click to verify the address.]

To navigate multiple pages of account users:

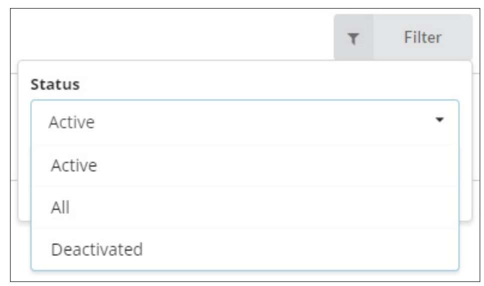
- Look to the bottom of your screen where you will find the page numbers indicating the total number of users you have created for this account
- Proceed to another page of users by clicking either the page number you would like to visit, or the Next button which will take you to the next page of users
- If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many users to display at a time by clicking on the “Showing…” link located to the right of the number of displayed users



To search for account users:

If you are trying to find a particular user belonging to the account, you can simply use the search bar located at the top right of the Users section next to the Filter button and above the list of all the users on the Accounts page. As you type in the name of the user you are searching for, the results will automatically be filtered to show the matches to the typed-in text.

To filter your list of users:



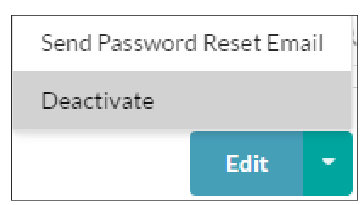
- Find the gray Filter button that is located at the top right-hand side of the Users section on the Accounts page, directly above the list of users, beside the search bar
- Click the Filter button and a dropdown menu will appear in which you will see three options you can filter users by: All, Active, or Deactivated
- Select any option and then click the blue Apply button at the bottom of the dropdown menu to enable the filter. The Filter button will now appear green to indicate a filter has been applied
- Or, click the gray clear button to close the dropdown without implementing a filter, or to remove any filter that is currently applied

To edit a user :

- Locate the blue Edit button appearing at the right-hand side of the page across from the user’s name
- Clicking this button will direct you to the user’s profile located in the All Users sub-category within the Account Network section of the left-hand menu on your screen. Refer to page 11 for more information about how you can edit specific users

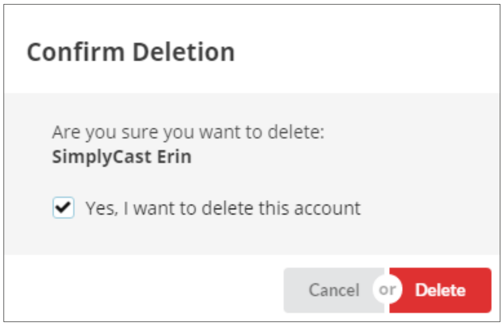
To send a user a password reset email :

- Locate the blue Edit button appearing at the right-hand side of the page across from the user’s name
- Clicking the arrow found on the right side of the button will cause a dropdown menu to appear where you will see the option to send a password reset email to the address provided by the user upon creation



To deactivate a user:

- Locate the blue Edit button appearing at the right-hand side of the page across from the user’s name
- Clicking the arrow found on the right side of the button will cause a dropdown menu to appear where you will see the option to deactivate the user, preventing them from logging into the account



6 Delete an Account

To delete an account:

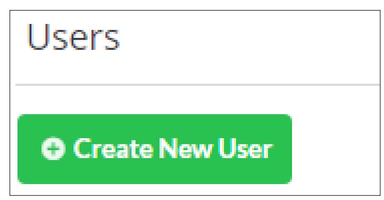
- Locate the blue Edit button appearing at the right-hand side of the page across from the account information on the Accounts page
- Clicking the arrow found on the right side of the button will cause a dropdown menu to appear where you will see the option to delete the account and any data information associated with it
- Once the Delete option has been clicked, a pop-up window will appear where you are asked to confirm the account deletion. Click the checkbox appearing in the window and then click the red Delete button to complete the deletion. Or, click the cancel button to close the pop-up window without deleting the account

All Users

In the menu that appears on the left side of the screen while on the Account Networks homepage, you will see the Account Networks section at the bottom with five sub-categories within the section. The second of these sub-categories is All Users. Clicking on this option will direct you to the page where you are able to view all of the users belonging to the various accounts that make up the account network.

On this page you can:

1 Create a New User



To create a new user and assign them to an account:

- Locate the green Create New User button found at the top left corner of the Users page. When clicked, a sidebar will appear from the right side of your page containing four fields
- The first field is where you must choose a primary account for the user to belong to, that they will access upon logging in. Choose an account from the dropdown list that becomes available when clicking on this field
- The next field you must fill out is the new user's email address that they will use to log in to the system
- The last two fields are the new user's first and last name which must be filled out to create the new user profile
- Click the green Create button at the bottom of this sidebar to complete the creation of the new user, or click Cancel to close the sidebar without creating a new user

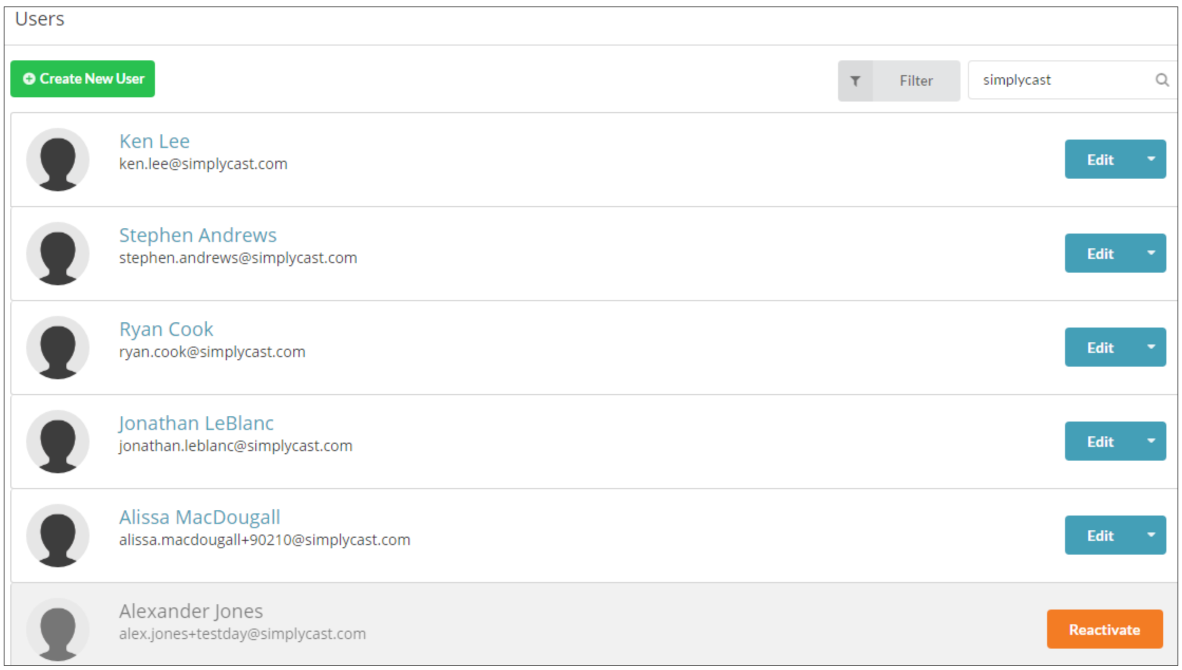
[**Note:** Once the user is created, a confirmation email will be sent to the email address that was used upon the creation of this user including a link to click to verify the address.]

2 View the List of Users

When entering the Users page, you should immediately see a list of all the users that belong to the various accounts within the account network, with the most recently created user at the top of the list.

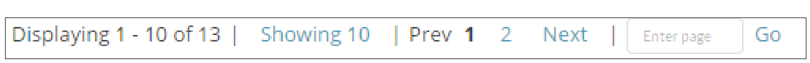
For each user in the list you will be able to see four items of information associated with the account:

- **Image/Logo:** This is an image (if available) that has been associated with the user. An image can be added or changed by editing the user profile. Refer to page 12 for more information
- **Name:** This is the name that was given to the account upon its creation
- **Contact Information:** This displays any contact information for the user (if available)
- **Edit Button:** This is a blue button that appears at the right side of each user that can be clicked to enter the user profile where changes can be made. Refer to page 11 for more information



3 Navigate Multiple Pages of Users

If there are many users in the network, they will be displayed on multiple pages in the All Users section. To view an account that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of accounts that have been created. Proceed to another page of accounts by clicking either the page number you would like to visit, or the Next button which will take you to the next page of accounts. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many accounts to display at a time by clicking on the “Showing...” link located to the right of the number of displayed accounts.



4 Search for Users

To search for users who are part of any account in the network:

- Locate the search bar located at the top right of the Users page next to the Filter button and above the list of all the users on the All Users page
- As you type in the name of the user you are searching for, the results will automatically be filtered to show the matches to the typed-in text

5 Filter Users

To filter your list of users:

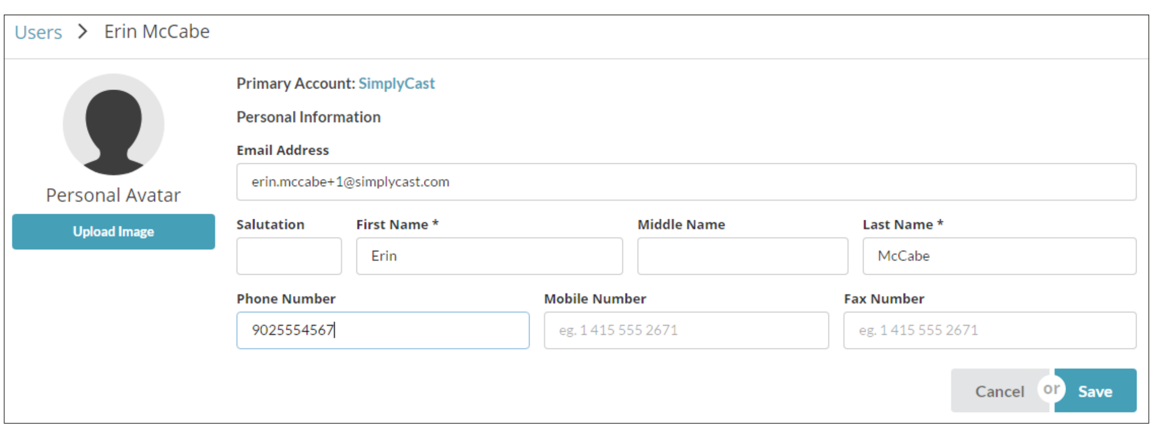
- Find the gray Filter button that is located at the top right-hand side of the All Users page, directly above the list of users, beside the search bar
- Click the Filter button and a dropdown menu will appear in which you will see three options you can filter users by: All, Active, or Deactivated
- Select any option and then click the blue Apply button at the bottom of the dropdown menu to enable the filter. The Filter button will now appear green to indicate a filter has been applied
- Or, click the gray clear button to close the dropdown without implementing a filter, or to remove any filter that is currently applied

6 Edit a User Profile

To edit the profile information for a user in the account network, locate the blue Edit button found at the right side of the user on the All Users page. Clicking the button will direct you to the user profile page.

In the top section of this page, you are able to view and modify any of the information fields that were filled out upon account creation as well as some supplementary information. You will see the Primary Account that the user belongs to and can view the account profile by clicking on the name of the account.

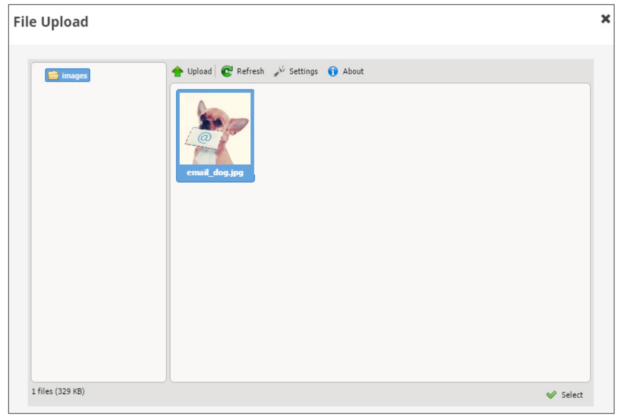
You are also able to upload an image to use as an avatar, as well as user and object roles in the bottom section of the page.



Upload an Image

To upload an image:

1. Locate the blue Upload Image button found below the Personal Avatar square on the left side of the user profile page. When clicked, an File Upload pop-up window will appear where you can choose an image that has already uploaded to the server, or upload a brand new image



2. If you see the image you would like to use in this list, click on it and then click Select in the bottom right-hand corner of the pop-up to continue the process of adding it to your account profile
3. If you do not see an image you would like to use or there are no images to choose from, click on the green Upload button found at the top of the pop-up, which will open another pop-up where you are able to search through your device to choose an image to upload. Once you have found an image, click the Open button at the bottom right of the pop-up to add the image to the list in the Image Finder window
4. Use the Refresh button located to the right of the Upload button at the top of the Image finder window to refresh the list of images if new ones have been added
5. The Settings button next to the Refresh button at the top of the window will display some organizational options when clicked. You are able to choose whether to view added images in thumbnail or list view, determine what information to display with each image (Name, Size, and/or Date), whether they will be ordered by image name, type, size, or date, and whether or not the images are displayed in descending order
6. Repeat Step 2 to continue adding the image as your user avatar

[**Note:** In the section on the left side of the Image Finder window, you will see an Images folder. By default, all added images will be placed in this folder, but for organizational purposes, you are able to create subfolders by right-clicking on the folder and selecting the Add New Subfolder option. You are able to create as many subfolders as you like.]

6. Click the blue Save button at the bottom of this section to save any changes made to your avatar or personal contact information, or click Cancel to remove any changes that haven't yet been saved

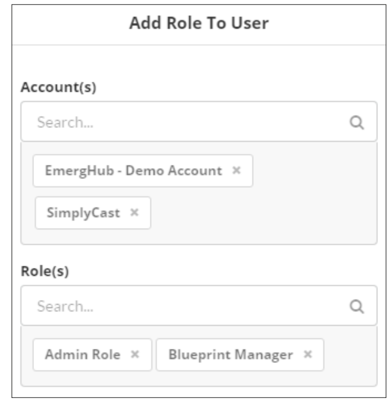
Application Role Mappings

The second section on the All Users page is the Application Role Mappings section, where you are able to add specific sets of pre-created roles to users that provide them with specific permissions as to what they can and cannot do within the EmergHub system. Refer to page 18 or 19 for more information on how to set up a role.

To add a new role mapping to the user:

- Locate the blue Add Role Mapping button found at the top left side of the Applications Role Mapping section, and upon clicking, a sidebar will appear from the right side of your screen

- This sidebar contains two fields. The first field is where you may choose the EmergHub account that you wish to give the user a role for. Clicking this field will cause a dropdown menu to appear containing a list of all the account network accounts that you are able to provide the user access to. Choose as many accounts from the list as you would like using the multi-select feature

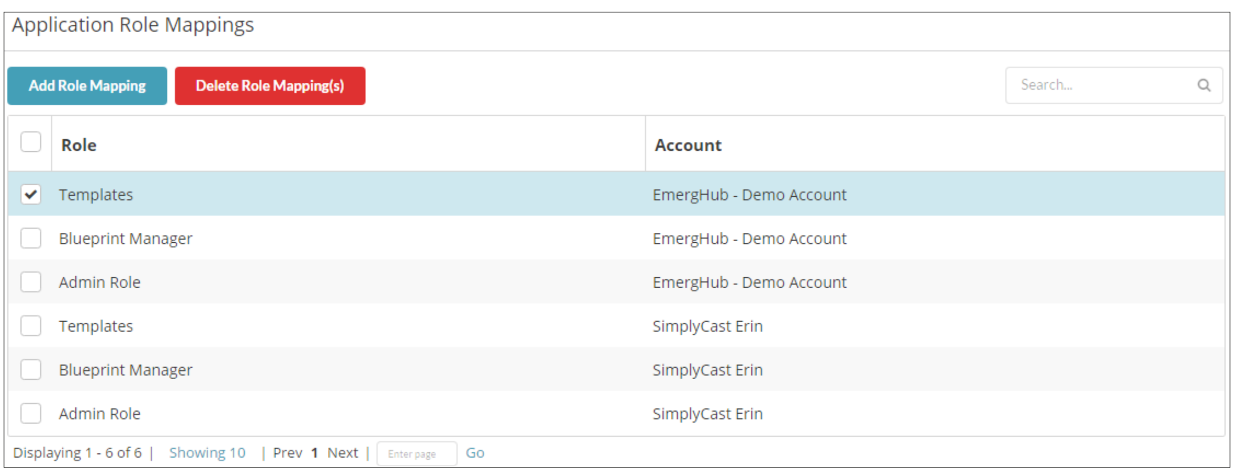


[**Note:** When giving a role to a new user, it is recommended that you first provide them with a role on their primary account before giving them access to any secondary accounts. This will ensure that the user can perform their required tasks within the EmergHub system.]

- The sidebar's second field allows you to select a pre-configured role to assign to the user. Click on the field to open a dropdown menu with the list of available roles. Select as many roles as you wish from this list using the multi-select feature. If there are no roles in the dropdown, you have not created any yet. Refer to page 18 or 19 to learn how to create a role
- When you have finished assigning account roles to the user, click the blue Save button found at the bottom of the sidebar to complete the process, or click Cancel to close the sidebar without saving your changes

To view the list of role mappings applied to the user:

Find the table that appears in the Applications Role Mappings section on a user profile page. In this table is the list of every role given to this particular user. There are two columns of information visible in the table: Role and Account. The Role column contains the name that was given to the specific set of permissions when it was created, and the Account column refers to which EmergHub account the role belongs to.

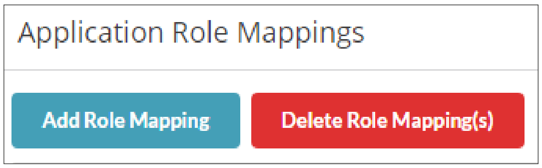


To navigate multiple pages of account roles:

- Look to the bottom of the Account Role Mappings table where you will find the page numbers indicating the total number of roles assigned to this user
- Proceed to another page of roles by clicking either the page number you would like to visit, or the Next button which will take you to the next page of roles
- If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many roles to display at a time by clicking on the "Showing…" link located to the right of the number of displayed account roles

To search for a role:

If you are trying to find a particular role that has been assigned to the user, you can simply use the search bar located at the top right of the Application Role Mappings section across from the blue Add Role Mapping button and above the list of all the roles in a user profile. As you type in the name of the role you are searching for, the results will automatically be filtered to show the matches to the typed-in text.



To delete a role:

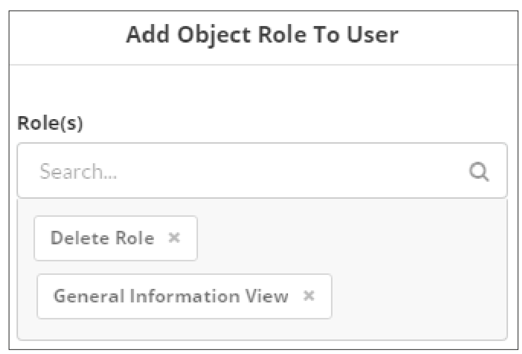
To delete an account role that has been assigned to a user, locate the checkbox that appears on the left side of the name of the role(s) you would like to delete in the Account Role Mappings table. Clicking on a checkbox will cause a red Delete Role Mapping(s) button to appear on top of the table, to the right of the blue Add Role Mapping button. Click this button to cause a pop-up window to appear asking for you to confirm the role deletion. Click the checkbox to confirm and them select the red Delete button to confirm the deletion of the role from the user. Or, click the Cancel button to close the pop-up without deleting the role(s).

Object Role Mappings

The third section on the All Users page is the Object Role Mappings section, where you are able to add specific sets of pre-created permissions to users in respect to various module elements. These permissions refer to shared information and what the user is allowed to do with this information once it has been shared with them. Refer to page 19 for more information on how to set up an object role.

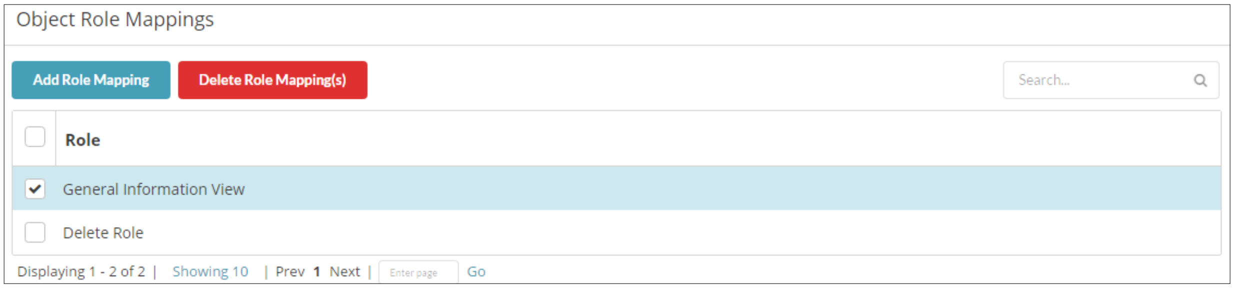
To add a new object role mapping to the user:

- Locate the blue Add Role Mapping button found at the top left side of the Object Role Mappings section, and upon clicking, a sidebar will appear from the right side of your screen
- This sidebar contains a field where you may choose the object role(s) that you wish to give the user. Clicking this field will cause a dropdown menu to appear containing a list of all the object roles you are able to provide the user. Choose as many roles from the list as you would like using the multi-select feature If there are no object roles in the dropdown, you have not created any yet. Refer to page 19 to learn how to create an object role
- When you have finished assigning object roles to the user, click the blue Save button found at the bottom of the sidebar to complete the process, or click Cancel to close the sidebar without saving your changes



To view the list of object role mappings applied to the user:

Find the table that appears in the Object Role Mappings section on a user profile page. In this table is the list of every role given to this particular user. The Role column contains the name that was given to the specific set of object permissions when it was created.

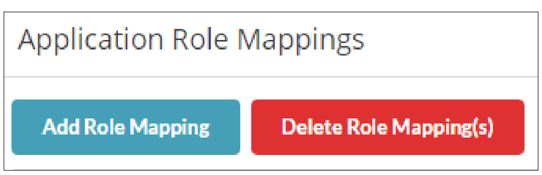


To navigate multiple pages of object roles:

- Look to the bottom of the Object Role Mappings table where you will find the page numbers indicating the total number of roles assigned to this user
- Proceed to another page of roles by clicking either the page number you would like to visit, or the Next button which will take you to the next page of roles
- If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many roles to display at a time by clicking on the "Showing…" link located to the right of the number of displayed object roles

To search for an object role:

If you are trying to find a particular object role that has been assigned to the user, you can simply use the search bar located at the top right of the Object Role Mappings section across from the blue Add Role Mapping button and above the list of all the roles in a user profile. As you type in the name of the role you are searching for, the results will automatically be filtered to show the matches to the typed-in text.



To delete an object role:

To delete an object role that has been assigned to a user, locate the checkbox that appears on the left side of the name of the role(s) you would like to delete in the Object Role Mappings table. Clicking on a checkbox will cause a red Delete Role Mapping(s) button to appear on top of the table, to the right of the blue Add Role Mapping button. Click this button to cause a pop-up window to appear asking for you to confirm the role deletion. Click the checkbox to confirm and them select the red Delete button to confirm the deletion of the role from the user. Or, click the Cancel button to close the pop-up without deleting the role(s).

Roles

In the menu that appears on the left side of the screen while on the Account Networks homepage, you will see the Account Networks section at the bottom with five sub-categories within the section. The third of these sub-categories is Roles. Clicking on this option will direct you to the page where you are able to create and manage your application and object roles that can be assigned to users within accounts in the All Users section.
There are two tabs found at the top of the Role Management page:

- **Application Roles:** These refer to permission sets that are applied to users that are application-based (per module). They can provide users with the ability to access, view, edit, share, and/or delete projects in the specified modules. Refer to page 18 for more information on how to create an application role

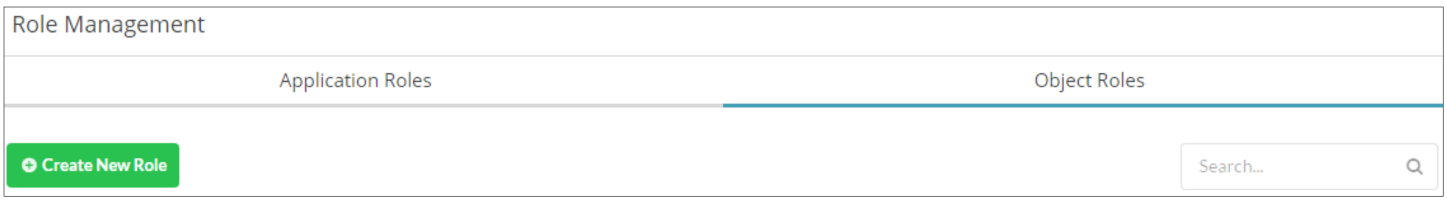
- **Object Roles:** These refer to permission sets that are applied to users that determine what a user is able to do with any specific information that may be shared with them. These roles can provide users with the ability to access, view, edit, share, and/or delete a certain project within a module that has been shared with their account. Refer to page 19 to learn how to create an object role

On this page, in either the Application or Object Roles tabs, you can:

1 Create a New Role

To create a new role:

Locate the green Create New Role button found at the top left side of the Role Management page in the Account Network section, and upon clicking, a pop-up window will appear asking you to provide a name for your new role. When you have entered a name into the textbox provided, click the green Create button to proceed to the next page of the role creation process. Alternatively, click Cancel to close the pop-up window without creating a new role. Refer to page 18 to learn more about creating application roles or page 19 to create an object role.

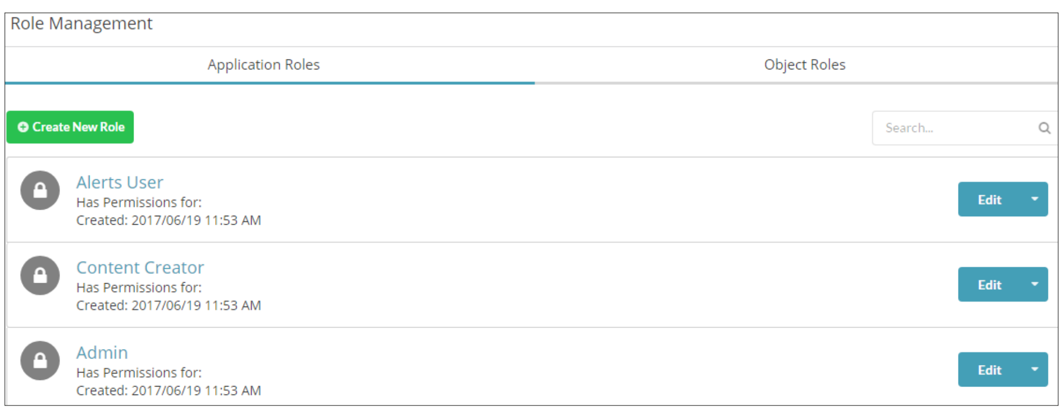


2 View the List of Roles

When entering the Role Management page, you should immediately see a list of all the roles that have been created within the account network, with the most recently created role at the top of the list.

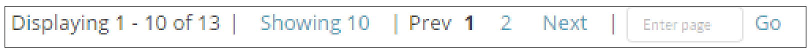
For each role in the list you will be able to see up to four items of information associated with it:

- **Name:** This is the name that was given to the role upon its creation
- **Has Permissions for:** This is displays the names of any applications that the role contains specific permissions for (only available for Application Roles tab)
- **Created:** This displays the date and time the role was created
- **Edit Button:** This is a blue button that appears at the right side of each role that can be clicked to enter the role setup process where changes can be made. Refer to page 18 for more information on configuring application roles and page 19 for object role configuration



3 Navigate Multiple Pages of Roles

If there are many roles in the network, they will be displayed on multiple pages in the Role Management section. To view an role that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of roles that have been created. Proceed to another page of roles by clicking either the page number you would like to visit, or the Next button which will take you to the next page of roles. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many roles to display at a time by clicking on the "Showing..." link located to the right of the number of displayed roles.



4 Search for Roles

To search for a role that has been created in the network:

- Locate the search bar located at the top right of the Role Management page above the list of all the roles on the page
- As you type in the name of the role you are searching for, the results will automatically be filtered to show the matches to the typed-in text

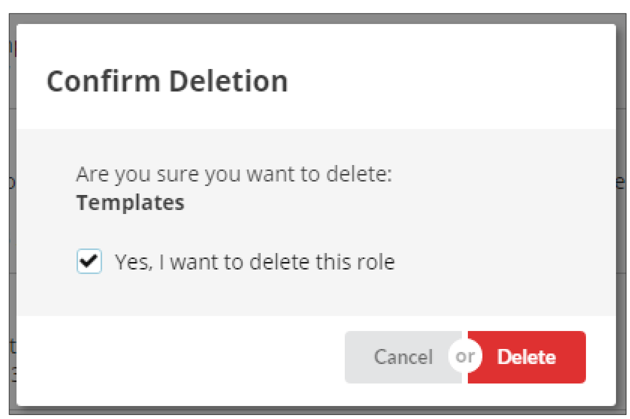
5 Edit a Role

To edit the configurations for a role created in the account network, locate the blue Edit button found at the right side of the role on the Role Management page. Clicking the button will direct you to the role setup process. Refer to page 18 for more information on role settings for application roles and page 19 for object roles.

6 Delete a Role

To delete a role created in the account network:

- Locate the blue Edit button found at the right side of the role on the Role Management page. Clicking the blue arrow button on the right of the Edit button will cause the Delete option to appear
- Clicking Delete will bring up a pop-up window asking you to confirm the deletion of the role
- Click off the checkbox in the window and click the red Delete button to confirm the deletion, or click Cancel to close the pop-up window without deleting the role



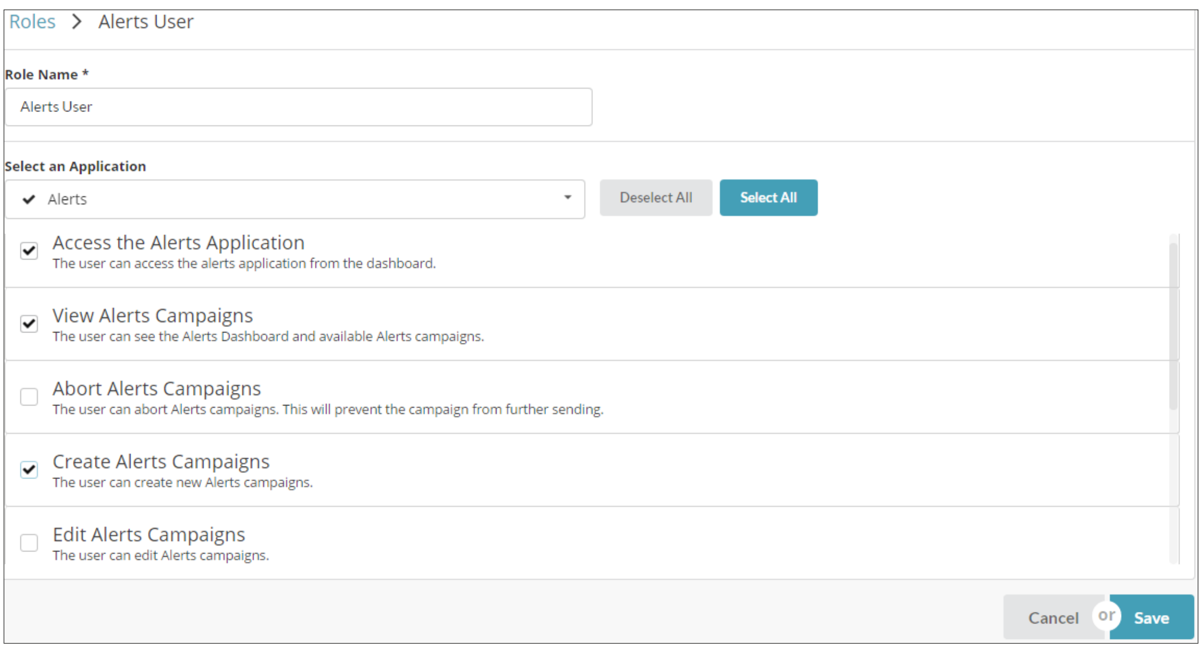
Create an Application Role

Once you have clicked the green Create New Role button found at the top left side of the Applications Roles tab on the Role Management page and have provided a name for your new role, clicking the green Create button will direct you to the next page of the application role creation process.

To configure your new application role:

- The first field you will see on the Application Role setup page is the Role Name field. It will be auto-filled with the name you provided upon the creation of the role, though you are able to modify the name if you wish. This is a mandatory field
- The next field is where you must select an EmergHub application for which to assign permissions from the dropdown menu that appears once clicking on the field. Selecting an application will cause a new section to appear on the page below the dropdown with a list of possible permissions with checkboxes beside them. These permissions include various standard create, view, edit, share, and delete capabilities
- To the right of the Select an Application dropdown, there are two faded buttons: Deselect All and Select All. Once an application has been chosen from the dropdown menu, these buttons will become active allowing for easy selection or deselection of all application permissions

[**Note:** For a more specified role, you are also able to check off various permissions individually instead of doing a mass selection. For example, if you wanted the role to have the ability to create and view alerts, but not be able to delete them, you can select only the permissions you need using the checkboxes located to the left of the permission name.]



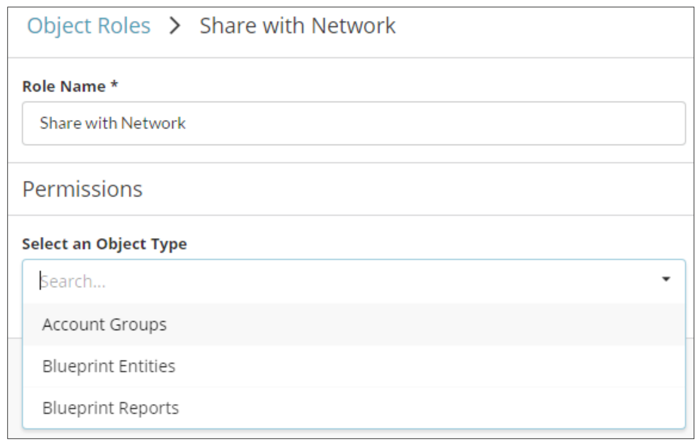
- Repeat for any other applications you wish to add permissions for by selecting the applications from the dropdown menu
- Once you have finished configuring the role, click the blue Save button at the bottom right side of the page to save your new role. Or, click Cancel to return to the main Role Management page without saving any changes

Create an Object Role

Once you have clicked the green Create New Role button found at the top left side of the Object Roles tab on the Role Management page and have provided a name for your new role, clicking the green Create button will direct you to the next page of the object role creation process.

To configure your new object role:

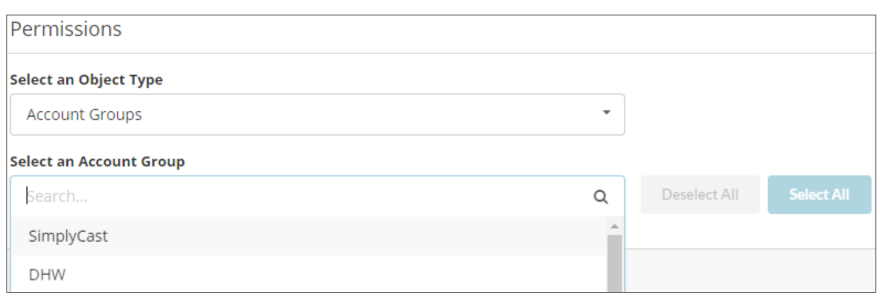
- The first field you will see on the Object Role setup page is the Role Name field. It will be auto-filled with the name you provided upon the creation of the role, though you are able to modify the name if you wish. This is a mandatory field
- The next field is under the Permissions heading and allows you to select an object type for which to assign specific permissions. There are three options available in the dropdown menu that appears when clicking on this field:
    1. **Account Groups:** These refer to a collection of accounts that have been grouped together because they share similar attributes or are part of the same sector. Refer to page 21 for more information on Account Groups
    2. **Blueprint Entities:** These refer to specific blueprint templates that have been created in the Blueprints application. Refer to the Blueprints & Maps User Guide for more information on entities
    3. **Blueprint Reports:** These refer to specific single or combined blueprint reports that have been created in the Blueprints application. Refer to the Blueprints & Maps User Guide for more information



Account Groups

To finish configuring an object role for an account group:

- Select an account group from list of available groups in the dropdown menu that appears after selecting this option
- A new section will appear below the Select an Account Group dropdown menu with the option to choose whether you wish a user possessing this object role to be able to share their data with this particular account group
- Check off the checkbox located to the left of the permission name to assign this permission to the object role
- Repeat for any other account groups you wish to add this permission to by selecting the groups from the dropdown menu

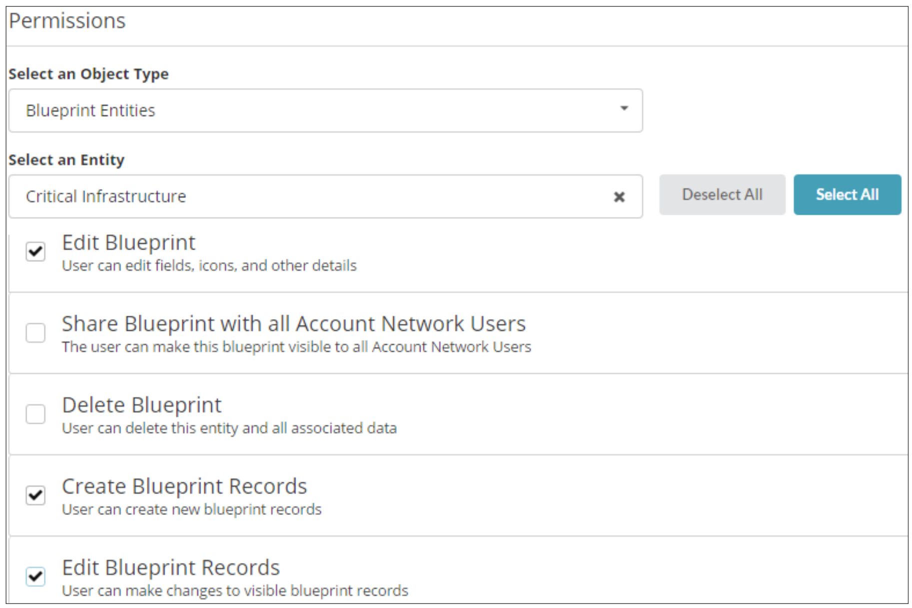


- Once you have finished configuring the role, click the blue Save button at the bottom right side of the page to save your new role. Or, click Cancel to return to the main Role Management page without saving any changes

Blueprint Entities

To finish configuring an object role for a blueprint entity:

- Select a blueprint entity from list of available entities in the dropdown menu that appears after selecting this option
- A new section will appear below the Select an Entity dropdown menu with a list of possible permissions with checkboxes beside them. These permissions include various standard create, edit, delete, and share capabilities for blueprints and blueprint records



- Check off the checkbox located to the left of the permission name to assign any permission to the object role
- To the right of the Select an Entity dropdown, there are two faded buttons: Deselect All and Select All. Once an entity has been chosen from the dropdown menu, these buttons will become active allowing for easy selection or deselection of all application permissions

[**Note:** For a more specified role, you are also able to check off various permissions individually instead of doing a mass selection. For example, if you wanted a user with this role to have the ability to create and edit the entity, but not be able to delete it, you can select only the permissions you need using the checkboxes located to the left of the permission name.]

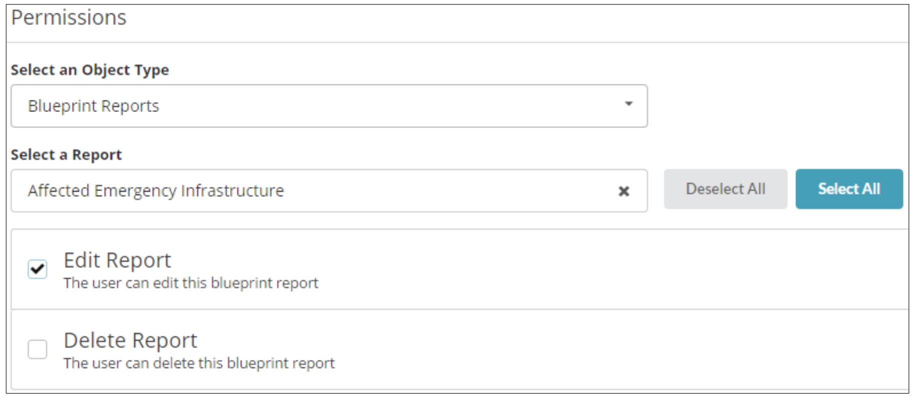
- Repeat for any other blueprint entities you wish to add permissions to by selecting the entities from the dropdown menu
- Once you have finished configuring the object role, click the blue Save button at the bottom right side of the page to save your new role. Or, click Cancel to return to the main Role Management page without saving any changes

Blueprint Reports

To finish configuring an object role for a blueprint report:

- Select a blueprint report from list of available report in the dropdown menu that appears after selecting this option

- A new section will appear below the Select a Report dropdown menu with a list of possible permissions with checkboxes beside them. These permissions allow a user with this object role to edit or delete the specific blueprint report



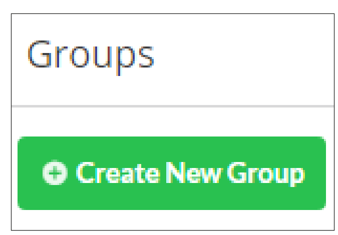
- Check off the checkbox located to the left of the permission name to assign any permission to the object role
- To the right of the Select a Report dropdown, there are two faded buttons: Deselect All and Select All. Once a report has been chosen from the dropdown menu, these buttons will become active allowing for easy selection or deselection of all application permissions

[**Note:** For a more specified role, you are also able to check off various permissions individually instead of doing a mass selection. For example, if you wanted a user with this role to have the ability to edit but not delete the report, you can select only the permission you need using the checkboxes located to the left of the permission name.]

- Repeat for any other blueprint reports you wish to add permissions to by selecting the reports from the dropdown menu
- Once you have finished configuring the object role, click the blue Save button at the bottom right side of the page to save your new role. Or, click Cancel to return to the main Role Management page without saving any changes

Groups

In the menu that appears on the left side of the screen while on the Account Networks homepage, you will see the Account Networks section at the bottom with five sub-categories within the section. The fourth of these sub-categories is Groups. Clicking on this option will direct you to the page where you are able to create and manage your account groups, which are collections of accounts that work within the same realm or sector and may have cause to share information back and forth between themselves.



On this page you are able to:

1 Create a New Group

To create a new group:

Locate the green Create New Group button found at the top left side of the Groups page in the Account Network section, and upon clicking, a pop-up window will appear asking you to provide a name for your new group. When you have entered a name into the textbox provided, click the green Create button to proceed to the next page of the group creation process. Alternatively, click Cancel to close the pop-up window without creating a new group. Refer to page 23 to learn more about creating groups.

2 View the List of Groups

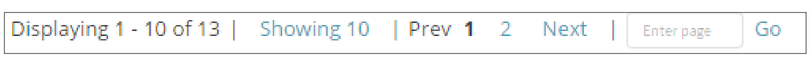
When entering the Groups page, you should immediately see a list of all the account groups that have been created within the account network, with the most recently modified group at the top of the list.

For each group in the list you will be able to see three items of information associated with it:

- **Name:** This is the name that was given to the group upon its creation
- **Created:** This displays the date and time the group was created
- **Edit Button:** This is a blue button that appears at the right side of each group that can be clicked to enter the group setup process where changes can be made. Refer to page 23 for more information on group configuration

3 Navigate Multiple Pages of Groups

If there are many groups in the network, they will be displayed on multiple pages in the Groups page. To view a group that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of groups that have been created. Proceed to another page of groups by clicking either the page number you would like to visit, or the Next button which will take you to the next page of groups. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many groups to display at a time by clicking on the “Showing...” link located to the right of the number of displayed groups.



4 Search for Groups

To search for a group that has been created in the network:

- Locate the search bar located at the top right of the Groups page above the list of all the account groups on the page
- As you type in the name of the group you are searching for, the results will automatically be filtered to show the matches to the typed-in text

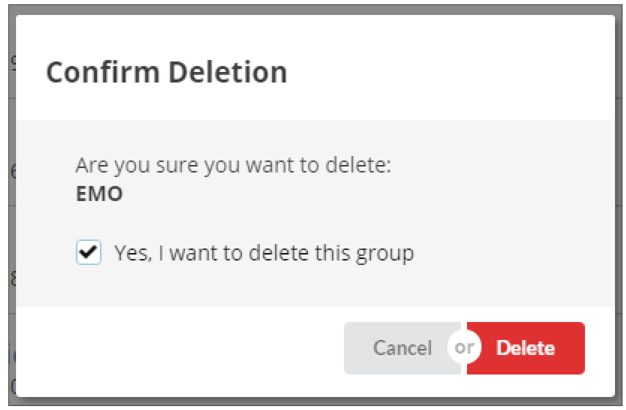
5 Edit a Group

To edit the configurations for an account group created in the account network, locate the blue Edit button found at the right side of the group on the Groups page. Clicking the button will direct you to the group setup process. Refer to page 23 for more information on group configuration.

6 Delete a Group

To delete a group created in the account network:

- Locate the blue Edit button found at the right side of the account group on the Groups page. Clicking the blue arrow button on the right of the Edit button will cause the Delete option to appear
- Clicking Delete will bring up a pop-up window asking you to confirm the deletion of the group
- Click off the checkbox in the window and click the red Delete button to confirm the deletion, or click Cancel to close the pop-up window without deleting the group



Create a Group

Once you have clicked the green Create New Group button found at the top left side of the Groups page and have provided a name for your new group, clicking the green Create button will direct you to the next page of the object group creation process.

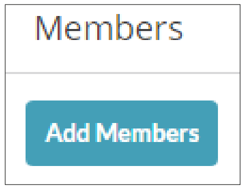
To configure your new group:

- The first field you will see on the Group setup page is the Name field. It will be auto-filled with the name you provided upon the creation of the group, though you are able to modify the name if you wish. This is a mandatory field
- The next field is where you are able to choose a color for the group's label. Select a color from the color palette provided and you will see the new color appear in the Label Preview section found to the left of the Name field
- The third field in the group creation process is where you may select a label icon that will appear to the left side of the group name in the list on the main Groups page. Choose your preferred icon from the array available

Members

The second section on the group configuration page is where you can add, vie, and remove members from the group. A group member refers to a specific account that many contain one or many users. Refer to page 4 to learn more about accounts.

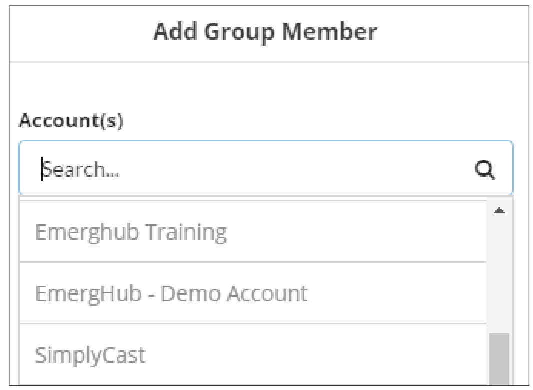
In this section, you can:



1 Add Members

To add an account to the group:

- Locate the blue Add Members button found at the top left corner of the Members section. Clicking this button will open a sidebar from the right of your screen
- In this sidebar you will see the Account(s) field where you are able to choose the EmergHub account you wish to add to the group from the dropdown list that appears when clicking this field. Or, begin typing the name of the desired account into the field and the dropdown results will filter to match the typed-in text
- Click on the account name you wish to choose from the dropdown and it will appear as selected in the dropdown as well as in the box below the Account(s) field. Choose as many accounts as you would like from the dropdown list
- Once you have finished choosing your accounts to add to the group, click the blue Add Members button at the bottom of the sidebar to add the accounts to your group, or click Cancel to close the sidebar without adding any new members

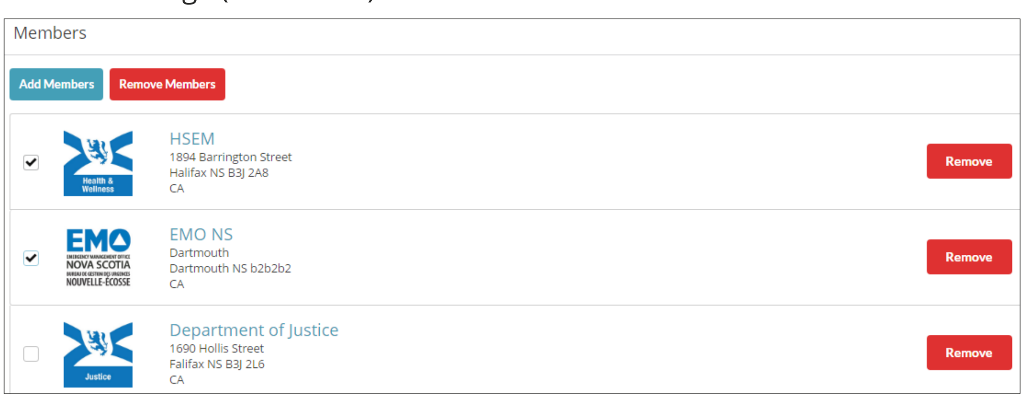


2 View the List of Group Members

In the second section of the group setup page, you will see a list of all the accounts that have been added to the group (if any).

For each account in the list you will be able to see three items of information associated with it:

- **Name:** This is the name that was given to the group upon its creation
- **Address:** This displays the address that was provide for this account upon creation
- **Image/Logo:** This is an image (if available) that has been associated with the account



To view an account that does not appear on the first page of the list, navigate down to the bottom of your screen where you will find the page numbers indicating the total number of group members. Proceed to another page of members by clicking either the page number you would like to visit, or the Next button which will take you to the next page of member accounts. If you know the page number you would like to go to, enter the page number in the provided field and select Go. You can also choose how many accounts to display at a time by clicking on the “Showing...” link located to the right of the number of displayed member accounts.

If you would like to view the profile for any of the accounts that are members of the group, simply click on the name of the account as it appears in the list of group members and you will be directed to the profile for that account where you can view the details and make changes. Refer to page 6 for more information about account configuration.

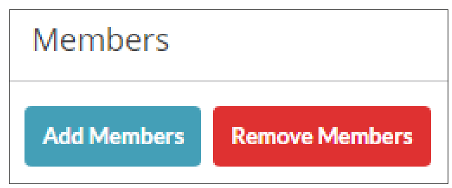
3 Remove Member(s)

In the Members section of the group setup page, you will see a list of all the accounts that have been added to the group (if any).

To remove a member account from a group:

- Locate the red Remove button found at the right side of the account name in the Members section on the page. Clicking this button will cause a pop-up window to appear asking you to confirm the removal
- Click off the checkbox in the window and click the red Remove button to confirm the removal, or click Cancel to close the pop-up window without removing the account from the group

To remove multiple member accounts from a group at once:



- Locate the checkbox that appears on the left side of the name of the member account(s) you would like to remove from the group. Clicking on a checkbox will cause a red Remove Members button to appear on top of the table, to the right of the blue Add Members button
- Click this button to cause a pop-up window to appear asking for you to confirm the account removal
- Click the checkbox to confirm and them select the red Remove button to confirm the removal of the account(s) from the group. Or, click the Cancel button to close the pop-up without removing the account(s).

Once you have finished configuring your group and its members, click the blue Save button found at the bottom of the first section to save your changes and return to the main Groups page. Or, click Cancel to return to the main Groups page without saving any changes.

Settings

In the menu that appears on the left side of the screen while on the Account Networks homepage, you will see the Account Networks section at the bottom with five sub-categories within the section. The last of these sub-categories is Settings. Clicking on this option will direct you to the page where you are able to view and edit some basic information about the Account Network.

On this page you are able to:

1 Edit the Account Network Name

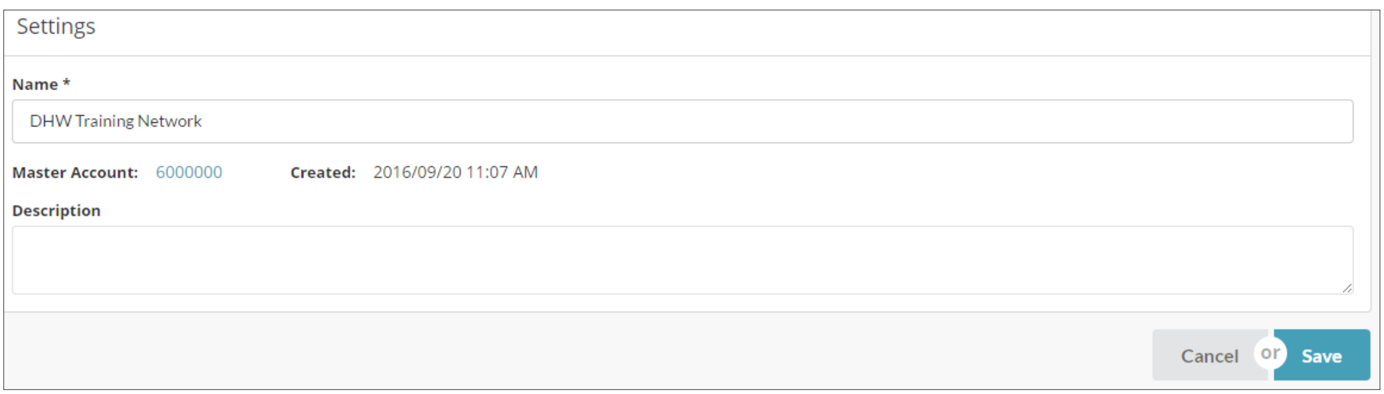
The first field you will see on the Settings page is the Name field which will be auto-filled with the name that was provided upon the creation of the account network, though you are able to modify this name if you wish. The account network must have a name, therefore this is a mandatory field.

2 View the Master Account and Creation Date

Below the Name field on the Settings page you are able to view the network's master account (the EmergHub account that was used to create the network) as well as the date and time the account network was created. Click on the account ID number of the master account to proceed to the profile for that account where you can see further details relating to the account.

3 Add a Network Description

The last field appearing on the Settings page in the Account Network section is where you are able to add or modify the description for the network. Simply type out a description in the textbox provided.



Once you have finished configuring the settings for the account network, click the blue Save button found on the right side of the page below the Description field to save your changes. Alternatively, click Cancel to return to the Accounts section without saving your changes.