

Quick Reference Guide

Creating Shared Dashboards

Overview

As an administrator with the *Setup Region Views* right, you can create shared dashboards to provide information about the status of resources and events to users in your region.

Shared dashboards are comprised of [gadgets](#), such as *Bed Utilization*, *Numeric Status KPI*, or *Multi-Status Resource Summary*, that retrieve and display information. When selecting a gadget, you decide what information to include and how to present it by specifying the display parameters, which usually requires identifying the [resource group](#).

Resource groups are resources that share one or more characteristics, such as facility type, location, or coalition. Some resource groups are provided, and you can create your own resource groups through **Setup**. An unlimited number of resource groups can be created and resources can belong to any number of groups.

On a shared dashboard, the information displayed in gadgets is filtered according to user rights. This information is automatically updated every time you access the dashboard and every three minutes. For more information about dashboards, go to the [Client Hub](#) and see the articles [Dashboard Gadgets](#) and [Resource Groups](#).

The screenshot displays the EMResource Region Dashboard interface. At the top, there is a navigation bar with tabs for Setup, View, Other Regions, Event, Preferences, Form, Report, Regional Info, and User Links. Below the navigation bar, the dashboard is titled "Region Dashboard" and includes a "system notice" button. The main content area is divided into several sections:

- Active Events:** A table listing events with columns for Event, Region, and Start Time. It shows "Car Crash on Highway 5" and "Severe Storm Advisory" for Springfield, US.
- ED's on Advisory:** A green box displaying the number "3".
- Emergency Department On Divert for All Hos...:** A yellow bar chart showing a value of "02".
- Facility Status for All Hospitals:** A table listing hospital resources and their status.
- Available Burn Beds:** A table listing hospital resources and the number of available burn beds.

Resource	Status
Cape Coral Hospital	Compromised
Columbia St. Mary's Hospital	Normal
DeSoto Memorial Hospital	Compromised
Fawcett Memorial Hospital	Normal

Name	Summary
Cape Coral Hospital	3
Columbia St. Mary's Hospital	5
DeSoto Memorial Hospital	4
Lee Memorial Hospital	4

To Create Shared Dashboards

You can share dashboards with *All Users*, *Selected Roles*, or *Selected Users* in your region. This flexibility allows you to set up custom dashboards for users such as all EMS roles, specific hospital roles, or for users that belong to a specific geographic location, coalition, or health system. At first, shared dashboards appear blank and must be configured by adding gadgets.

1. Point to **Setup** and in the list, click **Dashboards**. The *Dashboard List* opens.

Note: Default regional dashboards may be available in this list. Default regional dashboards cannot be edited or deleted, but you can hide them from your users.

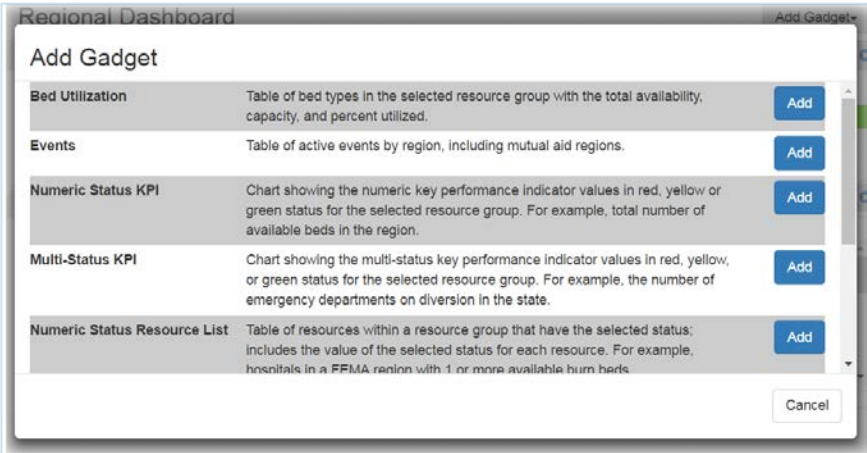



2. On the right, click **Create Shared Dashboard**. The *Create Shared Dashboard* page opens.
3. Enter this information.

Field	Description
Name	Name you want to use for this dashboard.
Number of Columns	Number of columns you want available for displaying and organizing gadgets. Note: Some users may access the solution through a mobile device with a small screen, which might make viewing and navigating information difficult if it appears in more than two or three columns.
Active	Whether the dashboard is available to users. This is automatically selected, which indicates the dashboard is <i>Active</i> . Clear the check box to deactivate the dashboard and hide it from users. Note: To work with inactive dashboards, select the include inactive dashboards checkbox on the upper right side of the page.
Access	Which users have access to the dashboard, including: All Users , Selected Roles , or Selected Users .

4. Click **Save**. The new dashboard appears in the list.
5. Locate the new dashboard and, on that row, click **Configure**. The *Dashboard for <Name>* page opens.

To Create Shared Dashboards (continued)

6. Take any of these actions.

If you want to...	Then...
Add a gadget,	<p>a. Click Add Gadget. The <i>Add Gadget</i> window opens.</p>  <p>b. Locate the type of gadget you want to add, and on that row, click Add. The <i><Gadget Name></i> window opens.</p> <p>c. Enter the parameters for that gadget. Click Done.</p>
Resize a gadget,	Click the lower edge of a gadget and move it up or down to change the height. The width cannot be changed.
Move a gadget,	Click the gray title bar of the gadget and move it to another position on the dashboard.
Refresh a gadget,	<p>On the gadget title bar, click the refresh icon. </p> <p>Note: Information displayed in gadgets is automatically updated every time you access the dashboard and every three minutes.</p>
Adjust the parameters of a gadget,	On the gadget title bar, click the gear icon. 
Delete a gadget,	On the gadget title bar, click the delete icon. 

7. When you are done configuring the dashboard, on the upper right side of the page, click **back**.

For more information, contact your Customer Success Manager or the support desk at 888-735-9559; in the support phone system, press 1 for Client Application Support and then 6 for EMSystems.