EMResource®

# Quick Reference Guide

# Creating and Managing Sub-Resources

## Introduction

A resource can own sub-resources, which can range from equipment to contact information. Sub-resources are also designed to report statuses. This two-level hierarchy allows both the facility or agency and an item it owns or service it provides to report statuses appropriate to its level.

## Workflow

Creating and managing sub-resources is a multi-step process, as outlined in this document. Begin by creating the appropriate sub-resource type. Note that you can use status types you have available or create status types that are specifically for sub-resources. This quick reference guide does not cover how to create status types.
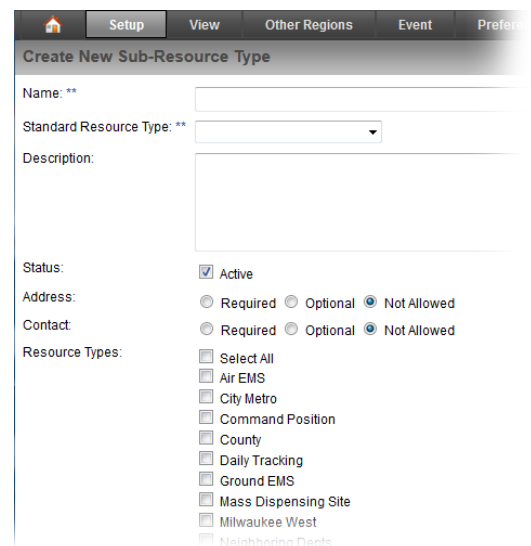
Once you have sub-resource types and status types, you can create the sub-resource and make certain it is added to the owning resource's details view.

In addition, the primary sub-resource of any resource type can be included in regional views.

## To Create a Sub-Resource Type

Just as every resource belongs to a resource type, every sub-resource must belong to a sub-resource type.

1. In the **Setup** menu, click **Resource Types**.
2. Click **Create New Sub-Resource Type**.
3. For **Name**, enter the name of the type.
4. From **Standard Resource Types**, select the appropriate option.
5. If appropriate, for **Description**, describe the sub-resource type.
6. Verify that the **Active** check box is selected.
7. For **Address**, indicate whether it is required, optional, or not allowed.
8. For **Contact**, indicate whether the information is required, optional, or not allowed.

## To Create a Sub-Resource Type (continued)

9. In the *Resource Types* section, select one or more types to associate with this sub-resource type.

10. If appropriate, for **Default Status Type**, select an option to be used as the default status type when appropriate.

11. In the *Status Types* section, select the status types to associate with this sub-resource type.

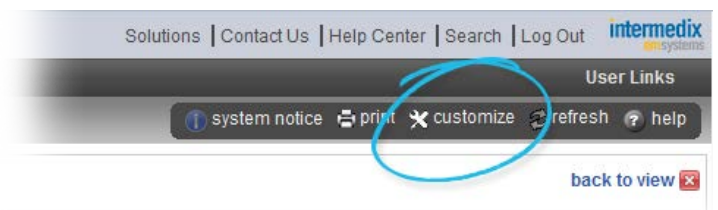12. Click **Save**.

## To Create a Sub-Resource

1. In the **Setup** menu, select **Resources**.

2. Locate the resource you want to add sub-resources to and click its **Sub-Resources** link.



3. Click the add button for the appropriate sub-resource type.

4. For **Name**, enter the sub-resource's name.

5. If appropriate, enter the address information for the sub-resource.

6. If appropriate, enter the contact information for the sub-resource.

7. For **Notes**, enter any additional information about the sub-resource.

8. If this is to be the primary sub-resource of this type, select the **Primary** check box.

9. Click **Save**.

## To Add the Sub-Resource to the Detail View

If the sub-resource type is new, you must add it to the *Detail View* for sub-resources of that type to be available from the view.

1. In the **View** menu, select the appropriate view.

2. Locate the resource to which the sub-resource belongs and click the resource's name. The *Detail View* page opens.

3. In the upper right corner, click **customize**.



4. On the *Edit Resource Detail View Sections* page, click **Sub-resources**.

## To Add the Sub-Resource to the Detail View (continued)

5. Select the check box next to the new sub-resource type.

6. Click the sub-resource type's name.

7. On the right, select the status types to include in the *Detail View*.

8. Click **Save**.
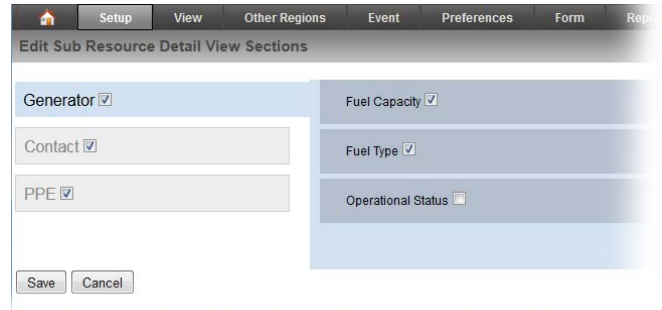
## To Add the Primary Sub-Resource to a View

You can stipulate that the primary sub-resource of any given type is shown in a view. For example, you can set up a view to show an hospital (resource) and its primary generator (sub-resource) and its statuses.

1. In the **Setup** menu, select **Views**.

2. Locate the appropriate view and click its **Edit** link.

3. For **Select Sub-Resource Types to be included in the view**, select the check box for the sub-resource type you want to add.

4. Click the **Resources** tab.

5. Make sure the appropriate resources are selected.

6. Click the **Status Types** tab.

7. Locate and select one or more status types associated with the sub-resource type you are adding to the view.

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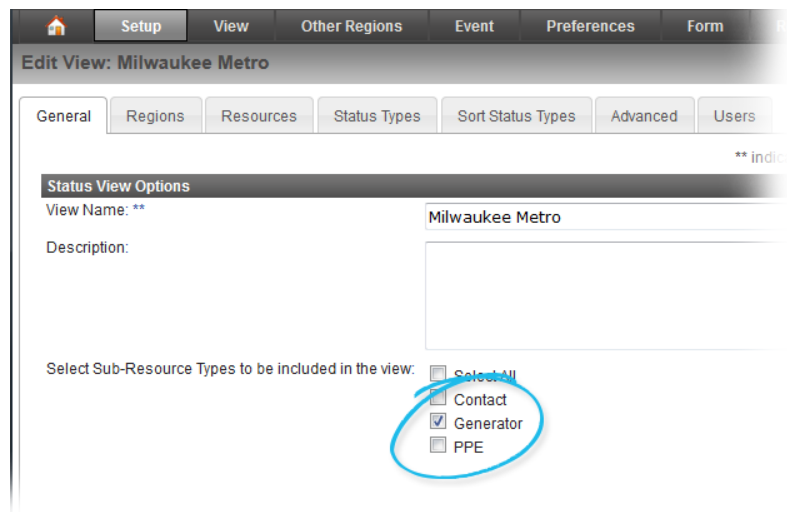
For more information, contact your Customer Success Manager or the support desk at 888-735-9559; in the support phone system, press 1 for Client Application Support and then 6 for EMSystems.