# Version 11.2

*Principal Help Files*

## Student Behavior &
## Incident Resolution Engine
### for the **Safest Schools**

# Table of Contents

# The *Grouplink for SafestSchools* Application

## Logging In

- Go to your support Login page. The URL for this page will vary depending on the web address designated in the Grouplink for SafestSchools system.

**Figure 1.1**

-



Enter your **Login ID** and **Password** (*Figure 1.1*). If you do not already have a Login ID and Password, contact your System Administrator.

- To change your password after initial login, click on your username in the upper left-hand corner of the **Grouplink for SafestSchools** screen. Your user account will pop up with your information, including a password text box. Delete the symbols that are currently in the text box and create your new password. For security reasons, this password is hidden. For more information, see the **My Incidents Screen** section.
- If you have forgotten your password, click the **Forgot your password?** link on the support login page.  It will then prompt you to enter the email address you used to set up your **HelpDesk** account. Enter your email address in the text field and click the **Reset Password** button. An email  will be sent to your inbox with a new password. Return to the support login page and enter your username and temporary password. Once you have logged in, click on your username in the upper right-hand corner of the screen and reset your password.

# The *Grouplink for SafestSchools* Menu

The *Grouplink for SafestSchools* displays a menu at the top of each screen in the application (***Figure 2.1***).

***Figure 2.1***
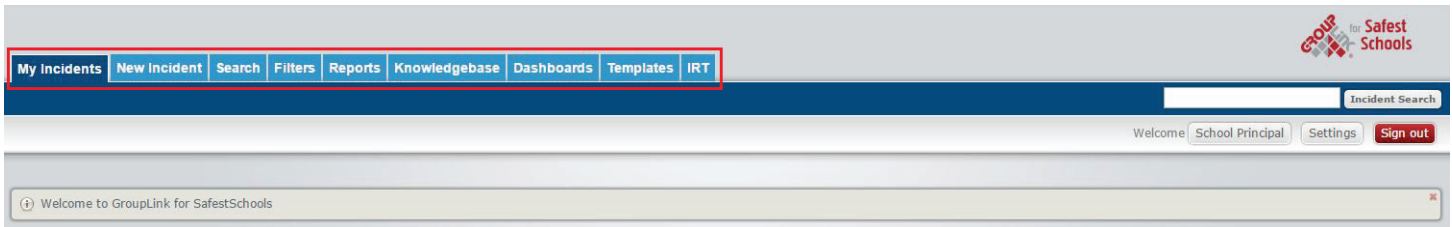


The following icons are shown in the menu:

- The **My Incidents** tab will take you to the My Incidents screen. This is also the first screen that will appear when you log into *Grouplink for SafestSchools*. For more information, see the **My Incidents Screen** section of the Help Files.
- The **New Incident** tab will open a blank Incident for you to fill out. This is discussed in more detail in the **Creating an Incident** section.
- The **Search** tab will take you to the Incident Search screen.  For more information, see the **Search** section.
- The **Filters** tab will take you to the Incident Filters management page where you can apply, edit, or delete Incident Filters.  For more information, see the **Incident Filters** section.
- The **Reports** tab directs you to the Reports management page where you can view, edit, or delete Reports.  For more information, see the **Reports** section.
- The **Knowledgebase** tab will take you to the Knowledgebase screen where you can access public Knowledgebase articles on different topics.  For more information, see the **Knowledgebase** section.
- The **Dashboards** tab will take you to the Dashboards page.  Note that the dashboard icon will only appear and be accessible if your organization has purchased the dashboard feature of *Grouplink for SafestSchools*. Further information can be found in the **Dashboards** section.
- The **Templates** tab will take you to the Incident Templates page.  This page is discussed in the **Incident Templates** section of the Help Files.
- The **IRT** tab stands for Incident Response Time.
- The **Sign out** button will sign you out of the *Grouplink for SafestSchools* application and should always be used before you close your web browser.

# The My Incidents Screen

As mentioned above, the My Incidents screen (*Figure 4*) is, by default, the screen that opens when logging into *G*rouplink for SafestSchools. The My Incidents screen is completely customizable to allow Users to view Incidents based on individual __Incident Filters__. To navigate to the My Incidents screen from any other screen in *G*rouplink for SafestSchools click on the **My Incidents** tab.

*Figure 4*
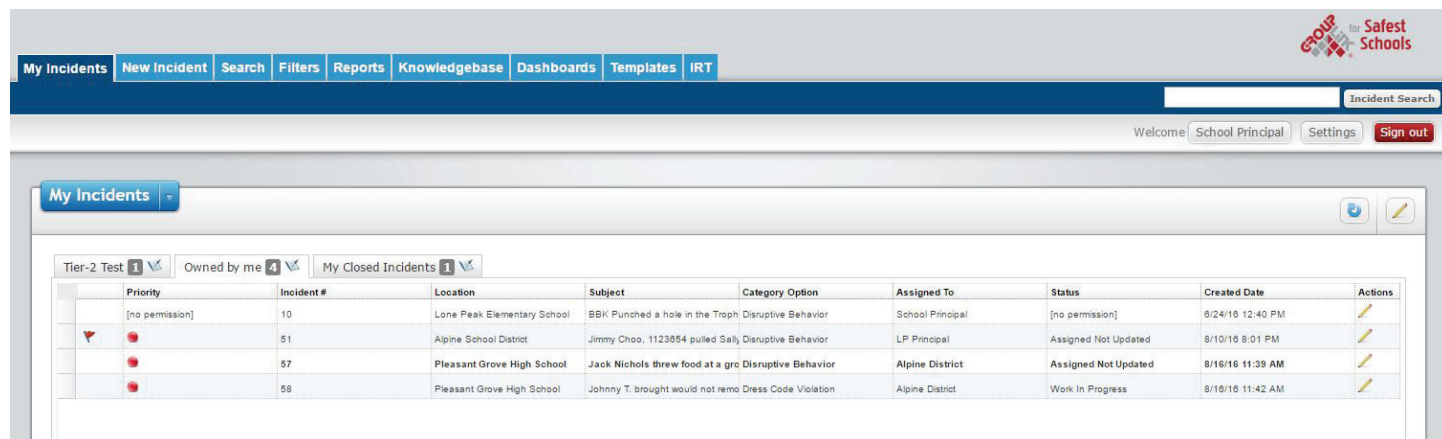


## My Incidents Screen Display.

On the far right side of the toolbar is the quick Incident search. To find an Incident, enter the Incident number, Location, Group, Category, Category Option, Subject, Note, History Subject, or History Note in the text field and click the search icon to the right or simply press enter. This will bring up the desired Incident to be viewed or modified. To search for multiple Incidents at once, separate the Incident numbers by a comma. All Incidents will appear in different windows.

- The **My Incidents** multi-action button will have three options when clicked, **Export**, **Find User**, and **Incident Templates**.

  - The first action listed under the My Incidents multi-action button is Export. Incidents can exported into **PDF** or **Excel** format. Either format can be printed or saved and sent to others in your organization. Note that if History Subject and/or Note are selected columns, the most recent History Subject/Note will be displayed on its own line.
  - The second action listed under the My Incidents multi-action button is **Find User**. This will open the Find User pop-up window (*Figure 5*) where you can search for any user in the *G*rouplink for SafestSchools system or the organization LDAP and view their Incidents.

*Figure 5*



| Last Name | First Name | Email | Username | Location | Status | Roles | Groups | Actions |
|---|---|---|---|---|---|---|---|---|
| #1 | Teacher | lprice@skycentral.com | ds | Alpine School District | Inactive | User | | |
| A.Realist | B. | be_a_realist_now@yahoo.com | be_a_realist_now@yahoo.com | | Active | User | | |
| Cabrera | Dan | dcabrera@grouplink.net | dcabrera@grouplink.net | | Active | User | | |
| Case-Worker | K-12 | londprice@gmail.com | kc | Alpine School District | Inactive | User | | |
| DeliverySubsystem | Mail | mailer-daemon@googlemail.com | mailer-daemon@googlemail.com | | Active | User | | |
| Director | District | jnemrow@grouplink.net | dd | Alpine School District | Active | User, Director | Pleasant Grove High School, Lone | |
| District | Alpine | districtoffice@grouplink.net | district | Alpine School District | Active | User, Director | Pleasant Grove High School, Lone | |
| ITBoss | Big | Big.ITBoss@grouplink.net | Big | Alpine School District | Active | User, Director | | |
| Manager | Manager | dturner@grouplink.net | Manager | | Inactive | Director, User | | |
| Manager | Super | dturner@grouplink.com | Super | | Active | User, Director | | |
| Pillsbury | Andrea | apillsbury@grouplink.net | apillsbury@grouplink.net | | Active | User | | |
| Principal | LP | lpprincipal@grouplink.net | lpprincipal | Lone Peak Elementary School | Active | User, Principal | Lone Peak Elementary School | |
| Principal | LPHS | safeschool.gl.lphs@gmail.com | lphs | Lone Peak Elementary School | Inactive | User | | |
| Principal | PG | pgprincipal@grouplink.net | pgprincipal | Pleasant Grove High School | Active | User, Principal | Pleasant Grove High School | |
| Principal | PGHS | safeschools.gl.pghs@gmail.com | pghs | Pleasant Grove High School | Inactive | User | | |
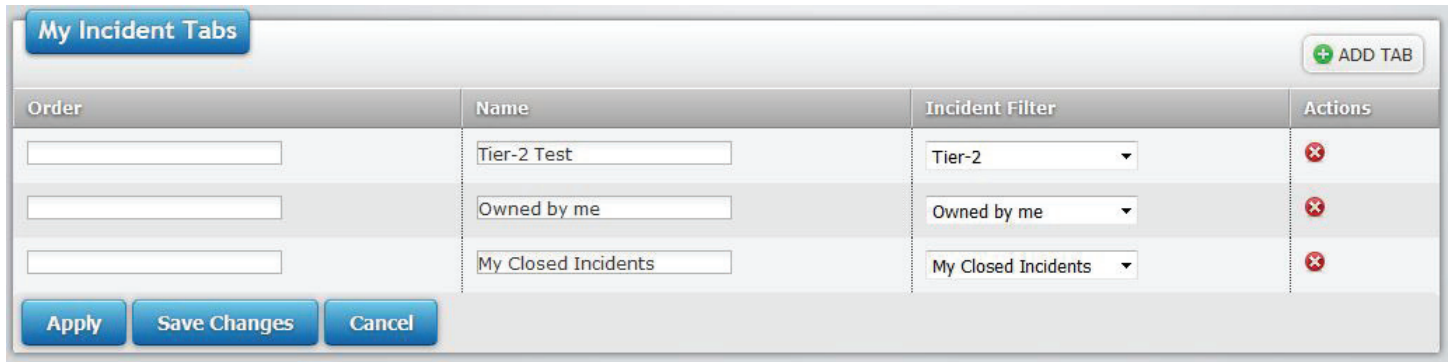
- o   To look up a user, enter their last name, first name, or email address and click the Search *Grouplink for SafestSchools* button. You can do a blank search to bring up every user in the system. If your organization is integrated with LDAP, you can use the Search LDAP button.
- o   Once you have completed your search, click anywhere on the row of the desired user. Doing this will pull all of that user's Incidents in the bottom portion of the window. There are multiple things you can do with a contact from here.

  - ☐   The Create New Incident link will allow you to create an Incident in behalf of the selected user.
  - ☐   To include the user's closed Incidents, check the Show Closed check box.
  - ☐   To view an Incident fully, double click anywhere on the Incident row. Note that if you do not have access to that particular Incident, an Access Denied error message will appear.

- The third action lists the Incident Templates. Hovering over this action will list groups that currently have Incident Templates available to launch. From here you can choose Incident Templates from different Groups. Clicking on an Incident Template will take you to the Pre-Launch page for the Incident Template. For more detailed information, see the **Incident Templates** section of the Help Files.

- The Check Incidents button will refresh the current tab with any recently added Incidents or updates on existing Incidents.
- The Customize Tabs button will open the My Incident Tabs screen. Here you can use saved **Incident Filters** to add Custom Tabs to your My Incidents screen.

## My Incident Tabs

To customize your My Incidents screen, click on the **Customize Tabs** ✏ button in the upper, right-hand corner of the My Incidents screen. This will take you to the **My Incident Tabs** page (*Figure 6*).

*Figure 6*
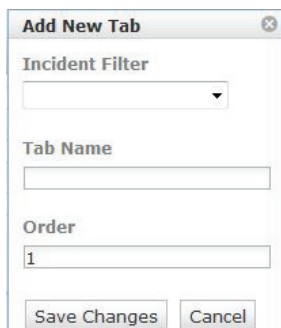


To add a new tab, click the Add Tab button ⊕. An **Add New Tab** pop-up (*Figure 7*) will appear.

*Figure 7*



- Select the Incident Filter you would like to create your new tab from. If you need to create a new filter, this should be done in the Incident Filters screen before adding your new tab.
- Enter the name you would like your tab to be called in the Tab Name text field.
- Select the order in which you would like your new tab to appear. The lower the number in the order field, the further left your tab will appear in the My Incidents screen.
- Once you have filled in the necessary information, click the Save Changes button to add the new tab to the My Incident Tabs list. If you do not wish to create the tab at this time, click the Cancel button. Either action will close the Add New Tab pop-up and take you back to the My Incident Tabs page.

Here, all tabs can be edited as well.

- The first column under the Add Tab button is the Order column. To order all tabs, type the

number corresponding to the tabs desired location on the My Incidents screen. The tabs will be shown from the lowest number to the highest, left to right.

- The Name column is where you can edit the Name of each individual tab.
- The Incident Filter column is where you can change which filter a custom tab is created from. To change the filter, click the down arrow next to the existing filter name and select from the drop-down list the new filter you would like to use.
- At the end of each tab's row in the My Incident Tabs page is a red X icon. To delete a tab, click the red X icon and click the **OK** button when asked if you are sure you want to delete the item. If you do not want to delete the tab, click the **Cancel** button.

Once you have made all the desired changes, click the **Apply** button. This will apply your changes and keep you in the My Incident Tabs screen. Clicking the **Save Changes** button will apply your changes and direct you back to the My Incidents screen. To go back to the My Incidents screen without saving any changes you have made, click the **Cancel** button.

## Incident Tabs

When using v9.1 or higher, the application will automatically create an "Owned By Me" tab, "My Closed Incidents" tab, and default tabs based on Groups that each individual user are currently part of in the system. Tabs created by *Grouplink* for SafestSchools will show all Incidents for that group. To adjust which Incidents are listed, click the **Edit** icon 🖉 and make any changes desired. The order of all tabs (including Custom Tabs) is dependent on the order given in the My Incident Tabs screen.

**Note**: If you have more tabs than are visible, you can use the arrows on either side of the tabs or the **Tab List** drop-down on the far right side to find the desired tab.

Under each tab, the Incidents are listed with nine different default columns: **Priority**, **Incident #**, **Location**, **Subject**, **Category Option**, **Assigned To**, **Status**, **Created Date and Actions**. Columns can be changed, added and edited with the help of the **Customize Tabs** button and individual Incident Filters.

- For example, an Incident Filter can be created to show all open Incidents for the IT group called Open IT Incidents. The filter may include the custom field Room Number. When a new Custom

    Tab is created for the My Incidents screen using the Open IT Incidents filter, the custom field Room Number will be listed as its own column.

The order of your Incidents in each tab is determined by the first column in the Incident Search column order box.

- For example, if Priority is at the top of the list in your Incident Search column order box, the Incidents in your customized tab will be listed in order by Priority.

Each column, including customized columns, can be sorted in ascending or descending order. To sort a column, simply click on the column header. One click will sort in ascending order and another will sort in descending order.

### *Bolded Incidents*
When an Incident is listed in bold print, it is a new Incident that has not yet been updated.

*Flagged Incidents*

Incidents may have a red flag in the very first column of the Incident list indicating that the last update on
the Incident was made by someone other than the logged in user.   *Incident Template Incidents*
Incidents that are part of an Incident Template will have a form down icon 📥 if they are a parent
Incident or a form up icon 📤 if they are a child Incident.

## View Individual Incidents

To access an individual Incident, double-click the desired Incident. It will open in a separate pop-up window and, depending on your user role, allow you to update the Incident as needed. You can also export the Incident to a PDF file that will include the full audit trail.

You also have the ability to select certain Incidents from the My Incidents screen by holding the Shift or Control keys and export multiple Incidents at once.

## Text Bubble View

If a subject, note, or any other value is longer that the width of its field, the text will trail off with ellipses. To view the full text of that field, hover it to view the text bubble (*Figure 8*) with the complete text of that field.

*Figure 8*



| Location | Subject | Category Option | Assigned To | Status |
|---|---|---|---|---|
| Lone Peak Elementary School | Jack Nichols threw food at a group of girls at another table | | | [no perm |
| Alpine School District | Jimmy Choo, 1123654 pulled Sall | Disruptive Behavior | LP Principal | Assigne |
| Pleasant Grove High School | Jack Nichols threw food at a gro | Disruptive Behavior | Alpine District | Assigne |
| Pleasant Grove High School | Johnny T. brought would not remo | Dress Code Violation | Alpine District | Work In |

## Incident Export

It is now possible within the software to export a chosen set of Incidents without having to export your entire Incident list.
To select consecutive Incidents to import, select the first Incident, hold the Shift key, and select the last of your desired Incidents. To select Incidents that are not listed together, hold the Control key and click the desired Incidents.
Once you have selected the Incidents you wish to export, click the drop-down arrow next to the Export button.

# Creating an Incident

Once you have logged into the *Grouplink* for SafestSchools system, click the **New Incident** tab located in the menu. A New Incident window will appear. (*Figure 9*).

*Figure 9*



## Contact Information

In the New Incident window, your **Contact Information** is already filled in with the information of the person logged in including an email address link that, when clicked, will open a blank email to the given Contact. If you are submitting the Incident for another user in your organization, you can select that user from the Contact drop-down list or use the text field as a google-like search to change the Contact.

# Incident Information

You must fill in the Incident Info (*Figure 11*) in order. The drop-down options for each category pre-determine which option(s) will appear in the drop-down for the next category.

*Figure 11*



- **Location**: Choose a location from the drop-down menu. The location options can be based on Buildings, Business Sites, etc. Choose the location that best describes the area where your problem exists.
- **Category**, **Category Option**, and **Assignment**: Choose the appropriate options that apply to your problem from the drop-down lists for these three categories. Note that if there is only one option in the drop-down list, the name will be selected automatically for you.
- **Priority**: Give the new Incident a Priority based on the immediacy of the issue. The default Priority is **Low**.
- **Status**: Select the status of the Incident based on what has or has not been done regarding the issue. The default Status is **Assigned Not Updated**.
- **Submitted by**: This field lists the user who is submitting the Incident.
- **Est. Comp. Date**: When this field is clicked, a date picker will appear giving you the option to select a date when you hope to have this issue resolved.
- If the Internal Asset Tracker or ZENworks Asset Tracker are set up for your organization, a search icon 🔍 will appear to search for assets to be tied to the Incident.
- Other options can be added to the Incident Info section as they are needed for your company or department. Fill in any other categories that have an asterisk (*) next to their name.

# Description

- Fill out the **Subject** and **Note** (*Figure 12*) as you would an email. Give a short title to your problem in the Subject line, and then describe your problem in detail in the Note text box.
- You can attach a relevant file to your Incident by clicking **Browse**. Doing this will launch a pop-up window where you can navigate to files on your computer.

*Figure 12*

Be sure that you have filled in every required field (*). If required fields are not filled out, the Incident will not save.
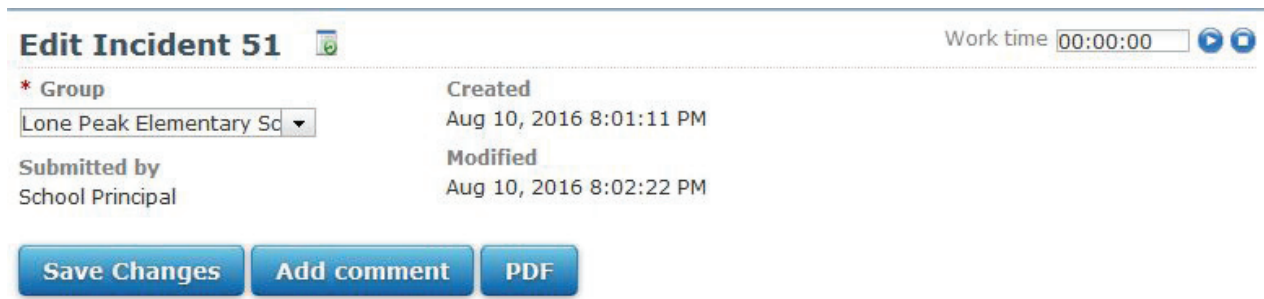
Once you have filled in all the relevant information, click **Save Changes** [Save Changes]. This will submit your Incident which will now appear in the default **Owned by me** tab in the My Incidents screen.

## Created Incident Information

Once Incidents have been created, you can view and edit them. The following is a brief explanation of the contents of a created Incident.

The top of the Incident (*Figure 13*) contains information such as the Incident number, when it was created, who submitted the Incident, and when it was last modified.  Next to the Incident # is a refresh button [icon].  This button should be clicked if the Incident needs to be refreshed for any reason.  Pushing F5 to refresh will create a duplicate Incident with a new Incident ID.  Three buttons also appear in this section.

*Figure 13*



- The **Save Changes** button will save any changes or updates you have made to the Incident.
- The **Add Comment** button will allow you to add a comment to the Incident with any updates that have been made and notify the Principal and/or the User or neither.
  There is also a multi-action drop down on the Add Comment button with the following options:

  - **Received a phone call**:  Selecting this option will open a comment with Received a phone call in the Subject line.  Here, you can add a comment pertaining to the received phone call and click the **Save Changes** button.  If you do not wish to save the received phone call, click the **Cancel** button.
  - **Placed a phone call**:  Selecting this option will open a comment with Placed a phone call in the Subject line.  Here you can add a comment pertaining to the placed phone call and click the **Save Changes** button.  If you do not wish to save the placed phone call, click the **Cancel** button.
  - **Schedule an appointment**:  Selecting this option will allow you to schedule an appointment using the GroupWise Integration feature of *Grouplink for SafestSchools*.  When selected, an appointment window will open (*Figure 14*).  To schedule the appointment, fill out the following information and click the Save Changes button.

***Figure 14***



o **To**: In this field enter the recipient(s) of the appointment. When entering more than one, each email address must be separated by a semicolon.

o **Watcher**: In this field, click to add any person who would like updates on the Incident. When clicking in this field, all users in Grouplink for SafestSchools will be available for selection.

o **CC**: In this field, enter any person you would like to receive a notification about the appointment. Note that entering the email address here WILL NOT post the appointment to the recipient's calendar. It will only notify them of the event.

o **BC**: In this field, enter any person you would like to receive a notification about the appointment. Note that entering the email address here WILL NOT post the appointment to the recipient's calendar. It will only notify them of the event. In this case, no one else will be able to see that this person received notification.

o **Place**: Here, simply enter the location where you would like the appointment to take place.

o **Start Date**: Click in this field to open the date picker and select the date on which you would like the appointment to take place.

o **Start Time**: Click in this field to select the time of the appointment from the drop-down list.

o **Duration**: Select the duration time for the appointment in hours, minutes, or days.

o **Mark As**: From this drop-down, select whether you would like you and the recipient(s) of the appointment to appear as Free, Tentative, Busy, or Out of Office on the GroupWise calendar.

o Click the **Busy Search** button to see whether or not you and the recipient(s) are available for the chosen date and time.

o **Subject**: Enter a Subject for the appointment. The appointment must have either a Subject or a Note to be sent.

o **Note**: Add a note describing the appointment in more detail. The appointment must have either a Note or a Subject to be sent.

o **Attachments**: Add any attachments that pertain to your appointment. An attachment is not required to send the appointment.

o **Notification**: Choose to notify the Principal of the Incident, the User, both or neither.

o   Click the **Save Changes** button to send the appointment or the Cancel button to cancel.
- **Schedule a task**:  To schedule a task, follow the same steps listed above for scheduling an appointment.

- The PDF button will open the Incident as a PDF document that can be printed, saved, or emailed to another person in your organization.

Four new sections will be added to the bottom of the Incident as well (*Figure 15*):  **History Comments, Sub-Incidents**, **Incident Audit**, and **Survey Results**. These four sections record various status changes and actions that occur after the Incident has been created.

*Figure 15*



**History Comments**
Whenever a change is made and saved on an Incident, the person editing the Incident is prompted with a Note textbox. The Note textbox is designed to allow the person editing the Incident to explain and clarify why the Incident is being changed or notify others about a related issue or problem. Attachments can be added to the note as well. The notes are recorded in the History Comments section where everyone who can view the Incident can see them. In this way, every Incident contains a history of explanations, concerns, etc., that pertain to that Incident.

## Sub-Incidents

Incidents can be logged in a series of Parent and Child Incidents. This feature enables Incidents to be organized in a hierarchy. For example, if an Incident is logged concerning a virus that has spread department-wide, it is also very likely that other Incidents will be logged that detail specific problems caused by that virus. All of these sub-problems stem from a single problem—the virus that has spread throughout a department. It is possible to create sub-Incidents regarding the same problem by opening the existing Incident and clicking New Sub Incident under the Sub-Incidents heading. This will allow you to create a new Incident as a Child Incident to the initial problem. Once the sub-Incident is saved, it can be accessed under the Sub-Incident section of the Parent Incident or by searching the Child Incident number.  More information on the Parent/Child Incident relationship can be found in the **Mass Update** section of the Help Files.

## Incident Audit

On every Incident there is an **Incident Audit** section. The Incident Audit is designed to record and time-stamp every change that is made on an Incident.
This section is designed by default to be collapsed. To see the Incident Audit information, click on the blue triangle in the section header.
The Incident Audit section has five different columns:

- **Field Name**: Records the field or category being changed. For example, if the audit trail is recording a change in Status for an Incident, **Status** will appear in the Field Name.
- **From** and **To**: These two columns record the actual change to the Incident—the change from one designation to another. For example, a status can change **from** Awaiting Dispatch **to** Work In Progress.
- **On**: Records the date and time the change was made.
- **By**: Records who made the change.

For example, if Principal sp changes the Status of an Incident **from** Assigned Not Updated **to** Police Notified on June 24, 2016 (5:08 PM), the Incident Audit will record it as shown in **Figure 16**.

### Figure 16

| Field Name | From | To | On | By |
|---|---|---|---|---|
| Incident Created | | | Jun 20, 2016 2:06:54 PM | admin |
| Contact | admin | pghs | Jun 24, 2016 5:08:01 PM | sp |
| Assignment | sp | pghs | Jun 24, 2016 5:08:01 PM | sp |
| Priority | High-Tier 3 | High | Jun 24, 2016 5:08:01 PM | sp |
| Status | Assigned Not Updated | Police Notified | Jun 24, 2016 5:08:01 PM | sp |
| Victim | Timothy O'Leary | | Jun 24, 2016 5:08:01 PM | sp |

## Survey Results

Contacts can be given the opportunity to fill out a survey after the problem described in their Incident is solved. This allows Grouplink for SafestSchools administrators to run reports on customer satisfaction. The results of these surveys are attached to the bottom of the Incident so that, when viewing an incident and its status changes, you can also view the End User's response to the incident system process. If no survey has been taken for an incident, the Survey Results section will read *Survey not submitted*.  For more detailed information, see the **Surveys** section of the Help Files.

# Incident Search

The Incident Search is a tool that allows you to define criteria used for individual Incident Filters. Using this tool you can search for Incidents using multiple Incident fields including custom fields created by your organization.

To enter the Incident Search (**Figure 17**), click on the Search tab at the top of the page.

*Figure 17*



## Create a Filter

The Incident Search automatically loads as a new filter. To name your filter type a new name in the **Filter** Name text field.
You have the option of making the filter private or public. Click the **Mark as Private** check box and the filter will only appear under your **My Filters** section of the Incident Filters Page. Leave the check box blank and the filter will appear organization-wide under the Public Filters section of the Incident Filters Page.

### Field Selection Box
The Field Selection box at the top of the page is where you choose the fields you want to filter on as you create your Incident Filter. Click the down arrow and select the field name for the field you would like to add to your Incident search, then click the green plus sign. You can delete the selected field boxes from your search by clicking the red X next to the field name.

Once you have your Field Boxes added to the Incident Search, you can define your search criteria. The first drop-down box in each Field box is a list of Boolean Operations that can be used to help define your search criteria. These operation choices are:

- Equals
- Not Equals
- Greater Than
- Less Than
- Contains
- Not Contains
- Starts With
- Ends With

The operations listed depend on the Field Box. Once you have chosen a Boolean Operation from the drop-down you can add your search criteria with text fields, drop-downs, or system searches in the different Field Boxes.

The **Created Date**, **Modified Date**, and **Estimated Completion Date** Field Boxes have search criteria options for Today, This Week, This Month, On, Before, After, Range, Last X Hours, Last X Days, Last X Weeks, Last X Months, and Last X Years. Select the criteria for your search and then enter in the date selection or numerical value and the search will be performed with your desired date criteria. This Week, This Month, Last X Hours, Last X Days, Last X Weeks, Last X Months, and Last X Years will all automatically update with the passing of time. For example, if you filter your search to show all open Incidents created in the last 5 hours, this report will automatically update to be exactly 5 hours from the current time on the server.

**Custom Field Selection**

Custom Field selection will appear at the bottom of the Incident fields.

If your organization has multiple Custom Fields with the same Field Label, only one Custom Field box will appear in the Field Selection drop down. To distinguish between the different Custom Fields you will need to narrow your search criteria by including Category Option in your search.

**Note**: to search on checkbox Custom Fields, you must select the Equals or Not Equals option and enter **true** or **false** (not case sensitive).  This information must be entered in English, regardless of the language the application is currently running in.

**Survey Results Selection**

In the next collapsible section, the Survey Results are available to search.  When the black arrow is clicked you will see three Survey Question Field boxes available for your search:

- **Please rate your experience on a scale of 1 to 5, 1 being unsatisfactory, 5 being excellent**
- **Was your Incident answered in a timely manner?**
- **Was your Incident answered?**

**Search Criteria**

- **Drop-down criteria**: click any drop-down arrow and select the option you would like to search by. Once the option you select fills the drop-down box, click the **green plus sign** located to the right of the item to add it to your search criteria. You can also type in the drop-down box to perform google-like searches in the drop-down options.

- **Text Field criteria**: type in any text field among the search boxes. To add your text as criteria for your filter, click the **green plus sign** ⊞ located at the end of the text field.
- **System Search criteria**: click on the **magnifying glass** 🔍 for Category or Category Option to launch a pop-up window that will list these search options in their hierarchical order. There will be a drop-down with two Boolean operation choices, Equals or Not Equals. By default Equals will be the Boolean operation selected in each drop-down. After choosing the Boolean Operation you desire, click on the checkbox next to the Category or Category Option you would like to add to as your search criteria. Click **Apply** and the pop-up window will close and add the selected search criteria to the Field Box. (Note: the search method for Category and Category Option are presented in a separate pop-up window, allowing you to see the hierarchical order. In other words, you are not only able to see what Categories or Category Options are available. You are able to see what Group each Category belongs to or see what Category a Category Option belongs to.) You can close this pop-up window at any time by clicking on the circular x icon in the top-left hand corner of the pop-up window.
- Click on the **magnifying glass** 🔍 for ZENworks Assets to launch a pop-up window with three text fields to search for ZENworks' assets: **Asset Name**, **Asset Type**, and **Operating System**. Enter your desired criteria and click on the **Search Button** to pull up specific ZENworks Assets that can be added as your search criteria. If you want to search all assets, you can leave the search boxes blank and click the Search Button. A list of ZENworks Assets that meet search parameters will appear in the pop-up window. The **Glasses Icon** 👓 can be clicked on to view the ZENworks Asset Detail Page for that asset. Click on the checkbox next to the ZENworks Asset you would like to add to your search criteria, then click on the **Add Selected Assets to the Search Button**. The pop-up window will close and add the selected search criteria to the Field Box.

To remove any search criteria from a Field Box click on the **red X** ☒ located to the right of each option.

Next, define the Column Order for your filter.  Click the down arrow to select a field to display in the column order box  (*Figure 18*). The Column Order box defines how your search results will be displayed and initially sorted, assigning a column to each Field Box Label added. For example, if you add two Groups to your Incident Filter but do not add the Field Box Label "Group" to the Column order box, the filter will still search for your selected Groups, but the search results will not assign Group its own column.

*Figure 18*
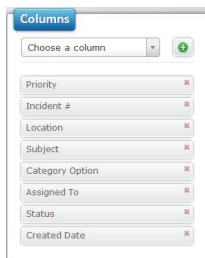


You can arrange the order of the items listed in the Column Order box by drag-and-drop. To move one item, simply click and drag it to the desired place. To move two or more items, select the multiple items (holding the shift key for consecutive items or the control key for non-consecutive) and drag and drop them into their proper place.

The defaults for the results are Priority, Incident #, Location, Subject, Category Option, Assigned To, Status and Created Date..
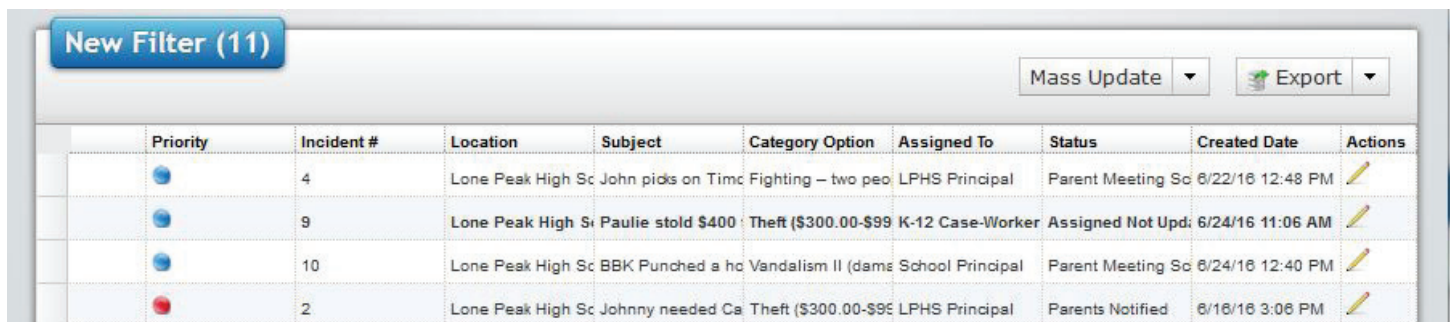
Once you have selected all your search criteria, click on the drop-down arrow in the multi-action button in the top, right-hand corner of the page and select one of the following options:

- **Save Filter**: This will save the Filter and add it to the Incident Filter Page, where it can be managed and used for Dashboards, the My Incident Screen, Graphical Reports, or an incident Search.
- **Reset Filter**: Choosing this option will clear any fields you have added and reset the Incident Search to the default boxes of Priority, Incident #, Location, Subject, Category Option, Assigned To, Status and Created Date.
- **Save As**: This will give you the option to save the filter you have created under a new name. This is useful when modifying an existing filter. You can add or delete fields as desired and save the changes you have made with a new name. This will keep the original filter as it was before.

## Apply a Filter

The **Apply Filter** button will open a separate Search Results pop-up window (*Figure 19*) with the results of the filter you created. The order in which the columns are listed will depend on the order you have chosen in the Column Order box in the Incident Search screen. The results will display in order depending on the first column chosen.

*Figure 19*



- **Note**:  If History Subject and/or Note are selected in the Incident Search, the most recent History Subject/Note will be displayed.

## Mass Update Incidents

To mass update Incidents, use the **Shift** or **Control** key to select which Incidents you would like to update and select the **Mass Update** button in the top left-hand corner of the window.

- The Mass Update box will appear as shown in *Figure 20*.

*F**igure 20**



- You have the option to update the

  - **Work time**:  Format must be in 00:00:00 (hours, minutes, seconds)
  - **Contact**:  Select a contact from the drop-down list or use the text box as a google-like search
  - **Assignment**:  Select a contact from the drop-down list or use the text box as a google-like search
  - **Priority**:  Select a priority from the drop-down list or use the text box as a google-like search
  - **Status**:  Select a status from the drop-down list or use the text box as a google-like search
  - **Estimated Completion Date**:  Clicking in the text box will bring up a calendar from which you can choose a date for estimated completion of all selected Incidents; format for the date must be MM/DD/YYYY
  - **Add a Comment to all selected Incidents**:  Add a Subject and/or Note in the designated text field to add them to all selected Incidents
  - **Group as children**:  Type the number of a **Parent Incident** in the text field to tie all selected Incidents to that Incident in a Parent/Child relationship

- To select a Mass Update option, click the check box to the left of the desired option and fill in the information necessary for that option.  You have the ability to update multiple pieces of information at the same time.
- Once you have selected the update options and filled in the information, click the **Save Chang es** button.  A message will then appear with the following information:

  - **Successfully saved Incidents**:  Here will be listed all Incidents that were saved with the chosen information successfully
  - **Unsuccessfully saved Incidents**:  Here will be listed any Incidents that were unable to save with the information chosen in the Mass Update

  For example:  All selected Incidents are updated with a new Assignment.  All Incidents are successfully updated except one.  This Incident may have a Category or Category Option that cannot be worked on by the chosen Principal and, Grouplink for SafestSchools, would not update properly.

## Mass Delete Incidents

To delete one or more Incidents, select the Incidents you wish to delete and select the **Delete** option from the **Mass Update** multi-action drop-down in the top right-hand corner of the Search Results pop-up window.

- To select multiple consecutive Incidents, select the first Incident, hold the **Shift** key, and select the last Incident.
- To select multiple Incidents that are not listed consecutively, hold the **Control** key and select each Incident.
- When you choose the delete option, a pop-up box will appear asking if you are sure that you want to delete the selected Incidents, and will list the selected Incidents. If you want to delete them, click on the **OK** button.  The window will close and the Incidents will be deleted.  If you do not want to delete them, click the **Cancel** button.

## Export Incidents

You also have the option to Export the Incident List in either an Excel or PDF format.  These documents can be saved, printed, or emailed to anyone in your organization.

You can also select certain Incidents within your Incident List to export.  To export selected Incidents follow the steps under Incident Export in the My Incidents Screen section of the Help Files.

## Incident Sorting and View

In the results window you have the following options:

- Sort the Incidents by the individual columns. For example, to list the Incident results by number in ascending order, click the Incident # column header. To reverse the order, click the column header again.
- To view an individual Incident, double-click the Incident you wish to open. The Incident will open in a separate window.
- If do not wish to update any Incidents, click the **Cancel** button.

# Incident Filters

The **Incident Filters** page (*Figure 21*) is a management page that lists all the **Private Filters** the logged in user has created as well as any **Public Filters** that have been created in the system. It was designed to allow for easy management of your Incident Filters as they are used for the engine of the My Incident Screen, Reports, and Incident Search.

*Figure 21*



## My Filters

The **My Filters** section of the page has a list of Filters that you, the logged in user, have created. These Filters are organized in rows with three columns: **Filter Name**, **Visibility**, and **Actions**.

- The **Filter Name** column lists (in alphabetical order) the Incident filter name that was created by that user.
- The **Visibility** column lists whether a filter is **Public**, indicating the filter is a public filter and the Grouplink for SafestSchoolsore visible in the **Public Filters** throughout the application, or **Private**, indicating that the filter is a private filter, only visible to that user in the application.
- The **Actions** column lists three actions that can be taken for that particular Incident Filter: **Apply**, **Edit**, and **Delete**.

    - If the **Apply** icon ▶ is clicked, that particular Incident Filter will be run and pulled up in the **Search Results** pop-up window for viewing and mass updating purposes.
    - If the **Edit** icon ✏ is clicked, that particular Incident Filter will be opened in the **Incident Search** where it can be edit, changed, and re-saved.
    - If the **Delete** icon ⊗ is clicked, a pop-up message will ask "**Are you sure you want to delete this item?**"  If you would like to delete the Incident Filter, click the **Yes** button and it will be deleted from the application.  If you do not wish to delete the filter, click the **Cancel** button.  If the Filter is in use, it cannot be deleted.  A message will appear when the delete icon clicked indicating where the Filter is in use.

## Public Filters

The **Public Filters** section of the page has a list of Filters that are public and visible to everyone throughout the application (based on the user's rights and privileges). These Filters are organized in rows with three columns: **Filter Name**, **Owner**, and **Actions**.

- The **Filter Name** column lists (in alphabetical order) the Incident filter name of that particular filter in the system.
- The **Owner** column lists the name of the individual that created or last updated the Public Filter. If the System Administrator created the Filter, the Owner's Name will be listed as SYSTEM ADMIN.
- The **Actions** column lists three actions that can be taken for that particular Incident Filter: **Apply**,**Edit**, and **Delete**.

  - If the **Apply** icon  is clicked, that particular Incident Filter will be run and pulled up in the **Search Results** pop-up window for viewing and mass updating purposes.
  - If the **Edit** icon  is clicked, that particular Incident Filter will be opened in the **Incident Search** where it can be edited, changed, and re-saved. If a Public Incident Filter is edited and then saved, that Filter's new owner will be the last individual to edit it. It will then be listed in the **Public Filters** section of the **Incident Filters** page for all users except the individual that edited it. For this user, it will be listed under the **My Filters** section of the Incident Filters page with the **Visibility** listed as Public.
  - If the **Delete** icon  is clicked, a pop-up message will ask "**Are you sure you want to delete this item?**" If you would like to delete the Incident Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button.

## Create New Incident Filter

To create a new Incident Filter from the Incident Filter page, click on the  in the top-right corner of the Incident Filters page. This will take you to the Incident Search page. For information on how to navigate the Incident Search page please see the **Incident Search** section.

# Reports

The **Reports Page** (*Figure 22*) is a management page that lists all the **My Reports** (private Reports, the logged in user has created), as well as any **Public Reports** that have been created in the system. It was designed to allow easy management of your graphical reports and the ability to create automatic, scheduled reports. This tool is also the power behind *Grouplink for SafestSchools's* Dashboard feature.

*Figure 22*



## My Reports

The **My Reports** section of the page has a list of Reports the logged in user has created. These Reports are separated by My Reports and Public Reports, in rows with four columns: **Report Name**, **Owner**, **Actions**, and **Schedule**.

- The **Report Name** column lists (in alphabetical order) the report name that was created by that user.
- The **Owner** column lists who created the report.
- The **Actions** column lists three actions that can be taken for each Report: **View**, **Edit**, and **Delete**.

    - If the **View** icon      is clicked, that particular Report will be run and opened in the **Report Results** pop-up window for viewing purposes (*Figure 23*).

*Figure 23*

## Incidents Assigned

|  | # | % | WorkTime |
|---|---|---|---|
| District, Alpine | 1 | 33.33 % | 00:00:00 |
| Principal, LP | 1 | 33.33 % | 00:00:00 |
| Principal, School | 1 | 33.33 % | 00:00:00 |
| **Grand Total:** | 3 | | 00:00:00 |
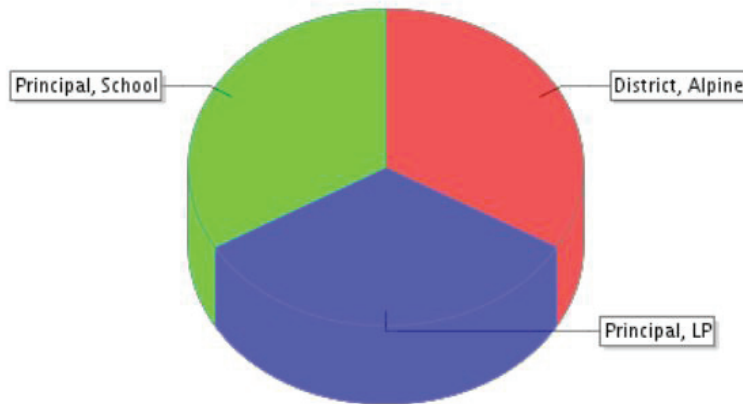


Individual Incidents can be accessed through a report by drilling down the information you have reported on and clicking the Incident number.

- If the **Edit** icon ✎ is clicked, that particular Report will be opened in the Report Editing screen where it can be edited, changed, and re-saved.

- If the **Delete** icon ✖ is clicked, a pop-up message will ask "**Are you sure you want to delete this item?**" If you would like to delete the Incident Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button.

• The **Schedule** column lists the recurrence for that Report in three different ways.

- If there is not recurrence pattern set for the Report, the column will list **Recurrence not set**.

- If a recurrence is set and has not yet been started, a Play icon ▶ will be shown along with a still half-circle pattern ⟲ to the right of it. The still half-cirlce pattern shows that the recurrence pattern is not currently running. To start the set Recurrence Pattern, simply click the play icon. The half-circle icon will begin rotating, indicating the recurrence is running.

- If a recurrence pattern is set and has been started, a Stop icon ⏹ will be shown along with a rotating half-circle pattern ⟲ to the right of it. The rotating half-circle pattern indicates the recurrence pattern is currently running. To stop or pause the Recurrence Pattern, click the stop icon. The rotating half-circle icon will stop indicating the recurrence is no longer running.

## Public Reports

The **Public Reports** section of the page has a list of Reports that are public and visible to everyone throughout the application (based on the user's rights and privileges). These Reports are organized in rows with four columns: **Report Name**, **Owner**, **Actions**, and **Schedule**.

- The **Report Name** column lists (in alphabetical order) the name of that particular report in the system.
- The **Owner** column lists the name of the individual that created or last updated the Public Report. If the System Administrator created the Report the Owner's Name will be listed as SYSTEM ADMIN.
- The **Actions** column lists three actions that can be taken for that particular Report: **View**, **Edit**, and **Delete**.

    - If the **View** icon is clicked, that particular Report will be and pulled up in the **Report Results** pop-up window for viewing purposes.
    - If the **Edit** icon is clicked, that particular Report will be opened in the Report Editing screen where it can be edited, changed, and re-saved. If a Public Report is edited and then saved, that Report's new owner will be the last individual that edited it. The report will be listed in the **Public Reports** section of the Reports page for all users except the individual that edited it. For this user, it will be listed under the **My Reports** section of the **Reports** page, with the **Visibility** listed as public.
    - If the **Delete** icon is clicked, a pop-up message will ask "**Are you sure you want to delete this item?**" If you would like to delete the Incident Filter, click the **Yes** button and it will be deleted from the application. If you do not wish to delete the filter, click the **Cancel** button.

- The **Schedule** column lists the recurrence for that Report in three different ways.

    - If there is not recurrence pattern set for the Report, the column will list **Recurrence not set**.
    - If a recurrence is set and has not yet been started, a Play icon will be shown along with a still half-circle pattern to the right of it. The still half-cirlce pattern shows that the recurrence pattern is not currently running. To start the set Recurrence Pattern, simply click the play icon. The half-circle icon will begin rotating, indicating the recurrence is running.
    - If a recurrence pattern is set and has been started, a Stop icon will be shown along with a rotating half-circle pattern to the right of it. The rotating half-circle pattern indicates the recurrence pattern is currently running. To stop or pause the Recurrence Pattern, click the stop icon. The rotating half-circle icon will stop indicating the recurrence is no longer running.

## Create New Report

To create a new Report from the **Reports** page click on the CREATE NEW button in the top-right corner of the page. This will take you to the **New Report** page (*Figure 24*).

*Figure 24*



Fill out the information on the New Report page

- **Report Name**: Give a name that will properly reflect the Report.
- **Incident Filter**: Select the Incident Filter you would like to create the Report from.
- **Report by date**: If you would like to Report on Incidents for a certain period of time, be sure this box is checked. A drop-down will appear on the right side of the screen in the same row with the choices to **Order by** the **Day**, **Week**, **Month** (default), or **Year**. If you wish to show all Incidents, leave this box unchecked.
- If the Report by date option is not selected, you have the option to run the report grouped by a specific criteria by clicking the **Group report by** drop-down and selecting one of the following options:

  - **Group**
  - **Location**
  - **Category**
  - **Principal**
  - **Priority**
  - **Status**
  - **ZENworks 10 Asset**

- You can then regroup the report results after you have drilled down into a grouped report by clicking on the **Regroup drill down information?** checkbox. Clicking this checkbox will load another drop-down box titled By. This drop-down has the same possible options as the **Group report by** options listed above.

  - For example, if you want to show all Incidents that belong to your IT Group and organize them by Principal, then by priority, open the **Incident Search**, click in the **Group** field box's drop-down and select the IT. Click on the **green plus sign** ⊞ to add it to the search criteria for the Group field box. Next, click on the checkbox in the top right corner of the Group field box to make that a column that appears in the **Column Order** of the report. Save the Filter under the name IT Group.
  - Click the Reports icon at the top of the screen to be taken to the Reports Management page. Click the circular Green Plus icon ⊕ at the top of the page to navigate to the New Report screen and add a new report.
  - Name your report and select the IT Group Incident filter from the **Incident Filter** drop-down. Select Principal from the **Group report by** drop-down and check the **Regroup drill down information** checkbox.  When the By drop-down appears, select Priority from the list. Next, select the Bar graph radio button and check the **Show Graph** checkbox. From the **Report format** drop-down select PDF and Alphabetically from the **Order by** drop-down.
  - Once you have defined your report, click the **Save Changes** button in the top-right corner of the Reports screen.  This will take you back to the Reports Management page where you can choose to View, Edit, or Delete your new report.  Click the View 🖼 icon and the Report will open in a new window and will be grouped by Principal, showing the total number of Incidents assigned to the Principal, the percentage of all the Group's Incidents that it represents, and the Incident's work times. You can click on a Principals name to drill-down and regroup that Student Relationship Manager's Incident by priority. To see the Incidents in each priority for that Student Relationship Manager, click one of the priorities and the Incident details will appear, allowing you to pull up the Incident from the Incident ID or email the Principal it is assigned to by clicking on the Assigned to name.

- **Show Graph**: If you would like to show a graph of the selected Incident template, check this box.Then select whether you want the results displayed in a Pie chart or a Bar graph.
- **Report format**: Select from the drop-down menu which format you would like the report results displayed in. The following options are available for reporting:

  - **PDF**: This option will allow for the report to be emailed to a boss, saved on a computer or network, or be printed.
  - **HTML**: This is simply a text format.
  - **Excel** spreadsheet: This will open the report in Excel and allow you to change and modify the report according to the rules and capabilities of the program.
  - **CSV** file: This format will open as an Excel CSV and will show the Incidents' column titles in columns and rows for modification.

- **Order by**: Select how you want the Incidents ordered in your report. The following options are available:

  - **Alphabetically**: The results will be listed by Principal in alphabetical order.
  - **Greatest # of Incidents**: The Principal with the greatest number of Incidents will be listed first, followed by the next highest and so on.
  - **Configure Scheduler for this report**: When this box is checked, a Scheduler box will

appear.

This is a powerful tool that will allow you to run Reports on a specific schedule without having to manually run the report every time. You can set the following to occur for your report.

- **Recurrence Pattern**: If you would like to create a Recurrence Pattern for your Report that will automatically launch the Report, select the radio button for the option to run the Report

    o **Daily**: Set your Report to Recur Every (X) Day(s)
    o **Weekly**: Set your Report to Recur Every (X) Week(s) on any certain day of the week
    o **Monthly**: Set your Report to run on a certain day of every (X) month(s) OR the First, Second, Third, Fourth, or Fifth (Day of the Week) of every (X) month(s)
    o **Yearly**: Set your Report to run on any certain day of a certain month OR the First, Sec ond, Third, Fourth, or Fifth (Day of the Week) of a certain month every year

- **Range of Recurrence**: In the **Start** text box, state when you would like your report recurrence pattern to begin. Then select whether you want it to **End After** a certain number of occurrences, **End By** a certain date, or **End Never**.
- **Email Message to be sent**: If you would like to send the report to certain people in your organization, add their email addresses in the **To** text field. Add a **Subject** and/or **Body** for your email. The report will be added to the email as an attachment.
- **Example**: You can set a report to run from the **Open IT Incidents** Incident Filter every Monday morning and be sent to the IT Principal for analysis. To do this, you would

    o Select the Open IT Incidents filter from the **Incident Filter** drop-down menu
    o Check the Configure Scheduler for this report checkbox
    o Select the **Weekly** radio button under Recurrence Pattern
    o Set it to **Recur Every 1 Week** and select the **Monday** checkbox
    o Set the **Range of Recurrence** to **Start** the same day you set up the Scheduler and select the **End Never** radio button
    o In the **Email Message to be sent** section, enter the IT Principal's email address (**To**) along with a **Subject** and/or message (**Body**)
    o The Report will be sent in an email every Monday morning as an attachment to the email you provided.

    **Note**:  Scheduled Reports will be sent at 2:30 a.m. the day it is scheduled to be released.

When you have finished filling out all the desired information, click the **Save Changes** button. This will save your Report in the Reports page under your My Reports section where you have View, Edit, or Delete the report.
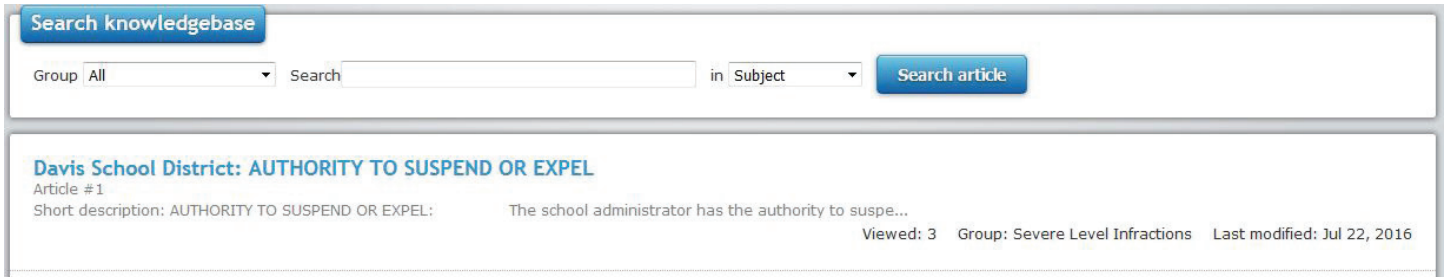
# Knowledgebase

Knowledgebase (KB) articles are available on multiple subjects and offer additional information on subjects that pertain to your organization.  These articles are created by Administrators, Directors, and Principals as they see the need for the information.

## Create a New Article
Locate the **Knowledgebase Article** window (*Figure 52*) by clicking on the **Knowledgebase** tab in the top menu, then **KB Management** in the upper left corner.

*Figure 52*



To create a new article:

- The **KB Management** link will appear in the upper left corner of the page.
- Click **New Article** and you will be taken to a WYSIWYG page where you can create a new article. In the WYSIWYG editor, you can format text and attach files.

You can also create a new article from an existing Incident.

- When an incident concerning a particular issue of interest is closed, a Convert to KB article button will appear (*Figure 53*)

*Figure 53*

- Click the Convert to KB article button and you will be taken to the same WYSIWYG page (*Figure 54*) to edit the Incident Article.

*Figure 54*



- Next, you have the option to make the article Private. To make the article private, select the check box next to the **Private** option. Once the article is made Private, only Student Relationship Managers and Directors belonging to the designated group will be able to view the article.
- Assign the article to a group by selecting one from the **Group** drop-down.
- Once you have added the text for the article, click **Save & View**.

  - Note that you can click the Knowledgebase icon at any time to return to the Main/Search Results page.

## Search for Articles

You can search for articles from the main page of the Knowledgebase screen. To locate this screen, click on the Knowledgebase tab on the menu. In this screen you will automatically see the top 10 viewed public articles. To view more articles, you may either navigate to the next set by clicking the next page in the bottom left corner or change the number of articles viewed per page in the bottom right corner. Once you have changed the number of articles viewed, the system will remember the number you have chosen next time you log in.

You can search for articles on specific subjects by using the search tools at the top of the KB screen.

- Select which group pertains to the articles you would like to find from the **Group** drop-down menu.  If you would like to search all group articles, leave the group setting as **All**.
- Use the **Search** text box as a Google-type search, entering key words in the article you are searching for.
- Using the **in** drop-down menu, select whether you want the key words found in the Subject, Body, or both Subject & Body.
- Click the Search article button **Search article** to find the desired article(s).

- Once you have found the desired article, simply click on the article to bring it to full view. In full view, you have the option to view the article as a downloadable PDF file and **Email** the Whole Page or the Article Link to any email address for easy future access (*Figure 57.1*).

*Figure 57.1*

# Dashboards

Dashboards are designed to harness the power of your saved Reports from the **Reports page** and display them visually using eight different types of Widgets (visual dials or charts used in your Dashboard). Before you start to create your dashboard it is imperative that you create the Report in the **Reports page** that you want to have visually represented in a Dashboard.

- Examples of Reports are: All Open Incidents, Incidents by Location, or All Today's Modified Incidents Grouped by Category and Regrouped by Priority. For help creating Reports please see the **Reports** section of the help files.

## Launching your Dashboard

- To launch the Dashboard, click on the Dashboards tab on the menu. This will pull up the Dashboard Management Page (*Figure 58*) with a list of all your system's Dashboards.
- In each Dashboard's row is an apply icon ▶ . Click this icon to launch that particular Dashboard. The application will automatically start to download the Java swing applet.
- Once it is downloaded click on the **Run** button and the Dashboard will open in a separate, resizable window (*Figure 72*) that will update live every 20 – 40 seconds. This window can be maximized on a 60 inch screen or on a personal desktop.

*Figure 58*
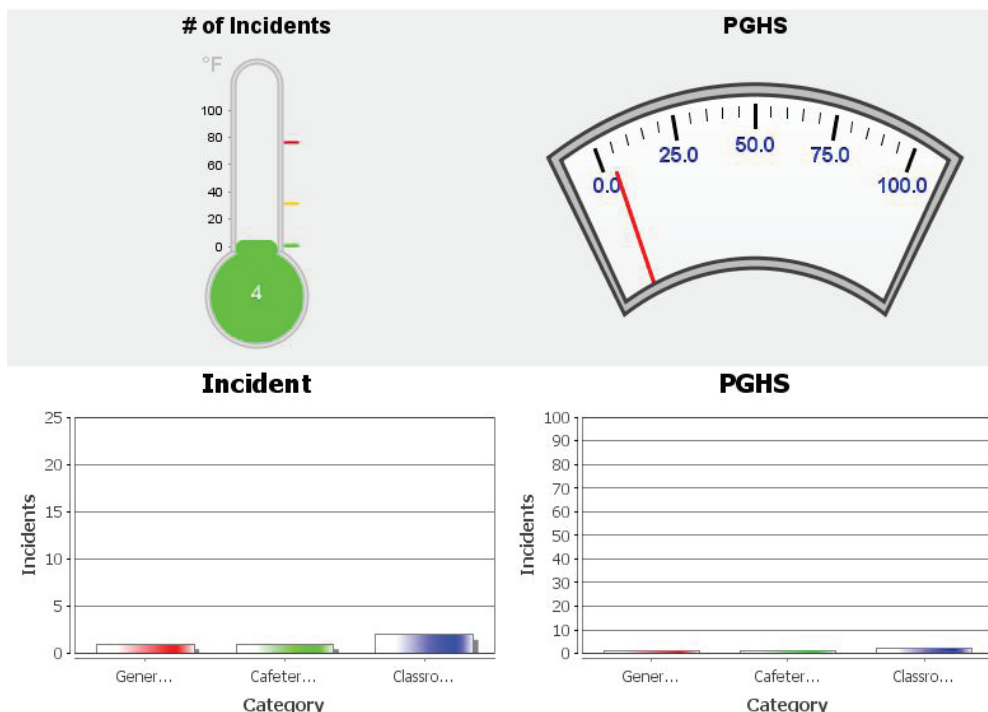


- It is important to note that end users will be able to launch Dashboards; however they will only be able to see the Incidents in that Dashboard they are the Contact for or those they have submitted. It is all based on the same rights and privileges as the **Incident Search**.

# Incident Templates

Incident Templates were designed to help implement your business processes, routine tasks, and requests directly in the application. Directors can create the template once and allow Principals to manually launch the Incident(s) at any time. They can also create an incident Template with multiple Incident layers (Child Incidents) that can be launched automatically based on predefined Workflow. This ensures the next Incident or Incidents in the Template will launch when the previous Incident or Incidents has its status changed to the predefined status.

Incident Templates can be manually launched in two ways.

- The first way to manually launch an incident Template is to select the **Incident Template** option under the My Incidents multi-action button (*Figure 58.1*) on the top left-hand side of the My Incident Screen.

  - Hover over the arrow on the **Incident Template** option to reveal all the groups that have Incident Templates created for them. Hover over a Group in the dropdown and it will reveal the Incident Templates that have been created for that Group.  They will be listed in alphabetical order.
  - Click on the Incident Template you desire to launch and that Incident Template will appear in the Incident Template Pre-Launch Page.

*Figure 58.1*
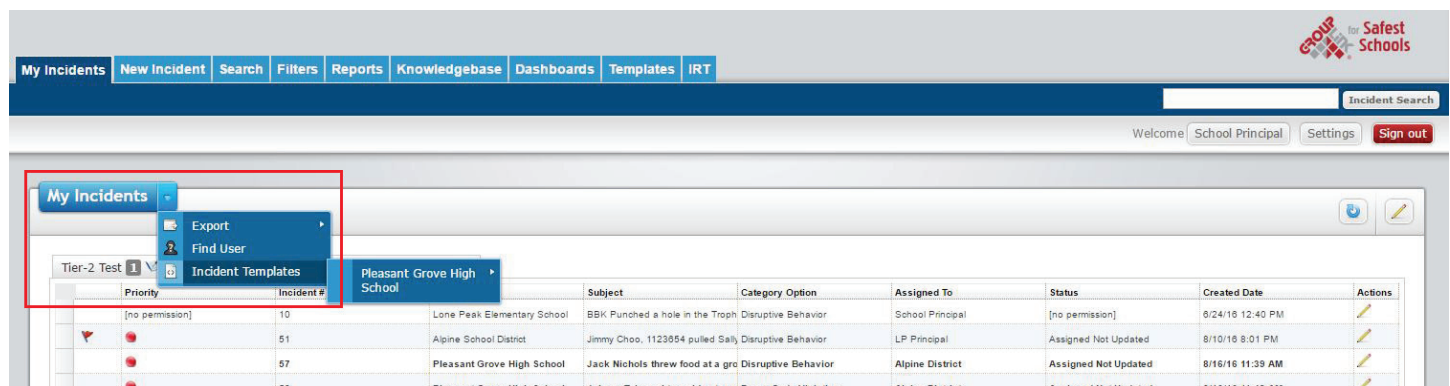


- The second way to manually launch an incident Template is to click on the **Incident** tab on the Menu.

  - Click this tab and you will be taken to the Incident Template Management Page.

## Incident Template Management Page

The Incident Template Management Page is populated with the all your system's Groups represented by Tabs (*Figure 59*). Each Group Tab is populated with a list of all the Incident Templates created for that Group. Here they will be listed in alphabetical order. You can click on each Tab to see the different Incident Templates for each Group.

*Figure 59*



For each Incident Template, under **Action**, there is a **Launch Icon** ⇨ . When the icon is clicked, that Incident Template will open in the **Incident Template Pre-Launch Page**.

## Pre-Launch Page

Once the Incident Template has been opened in the Incident Template Pre-Launch Page (*Figure 63*), the head Incident in the Template will be opened on the right-hand side of the screen with the Tree-Diagram on the left-hand side of the screen.

*Figure 63*
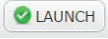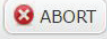
- If the contact information of the Incidents in the Incident Template were left empty when created, they will automatically fill with your information. You may change the contact information if you are launching the Incident Template for another user.
- Navigate through the Incidents in the Incident Template and make any changes that are desired to the Template including adding comments, new contacts, or tying assets. Be sure to save all the changes to each Incident before you navigate to another Incident in the Template.

- In the head Incident of the Template you will see a **Copy this Contact to all sub Incidents** icon next to the **Contact** field. This allows you to apply the change in the Contact name to all the Incidents in the Incident Template. To do this, simply change the Contact in the head Incident Template and click the **Apply to all Icon**.

## Incident Template Launch

When you are done making changes to the Incident Template, click the **Launch Button** LAUNCH in the top right-hand corner of the screen. Clicking on the **Launch Button** will launch the Incident Template and give you a visible confirmation (Incidents Launched Successfully). For the launch to be successful, all of the fields that are required to submit an Incident must be filled out in every Incident of the Template.

If you decide not to launch the Incident Template simply click on the **Abort Button** ABORT. Clicking on the **Abort Button** will pull up a **Confirmation** box asking you if you really want to abort the launch. If you want to abort the launch click **OK**. You will then be taken back to the Incident Template Management Page. If you don't want to abort the launch, click the **Cancel** button.

- It is important to note that all Incidents in the **Incident Template Launch Page** will become rogue Incidents if they are not launched or are aborted from the Incident Template Launch Page. These rogue Incidents will only take up space in your Database. They will not show up in the system or affect any reporting.

# Mobile Devices

*Grouplink for SafestSchools* can be accessed anywhere from smart devices.  This feature was added for the benefit of Principals and Directors who are constantly away from their computer.

## Supported Mobile Devices

Principals have the ability to access *Grouplink for SafestSchools* from their smart devices.  The recommended devices supported by *Grouplink for SafestSchools* are:

- Android Mobile Devices (v 1.1 or higher)
- Blackberry Bold (v 4.6)
- Blackberry Curve (v 4.6)
- iPhone (v 3.0 or higher)
- iPod Touch (v 2.0 or higher)
- Windows Mobile (v 5.2)

## Access *Grouplink for SafestSchools* on PDA

The *Grouplink for SafestSchools* can be accessed the same way you access it through your computer's web browser.  Simply point your browser to http://<servername>/Grouplink for SafestSchools. You will be directed to the *Grouplink for SafestSchools* login page and, upon authentication, you will have access to the My Incidents page in the PDA compatibility mode.

From the My Incidents screen, you have the ability to change which of your groups you are viewing Incidents for by selecting a group from the drop down menu under your user name in the top, left corner of the screen.  You also have the ability to choose to view Incidents assigned to you, from the Incident pool, or all the group Incidents by selecting one of those choices from the drop down menu in the top, right corner of the screen. In the bottom, right corner of the screen, you have the ability to change the number of Incidents listed in your My Incidents screen.

To create a new Incident, simply select the **Create New Incident** link in the top, left corner. You will then be taken to the New Incident screen. This screen is similar to the New Incident screen of a desktop. Fill in the information flow just as you would in a regular Incident.    • Note that the description area is slightly different than a desktop New Incident screen with only
    Subject and Note text fields. Just like the desktop version of *Grouplink for SafestSchools*, only
    Subject is required to submit the Incident.

After filling out the information, select the **Save Changes** button. This will refresh the Incident with the Incident Number at the top and a History Comments section. To return to the My Incidents page, select the My Incidents link in the top, left corner of the screen.

Incidents can be viewed by selecting the individual Incident number.  The Incident will appear as it would on a computer screen. Comments can be submitted from within the Incident by selecting the **Add History Comment** icon  on the far right side of the History Comment section. This feature is the same as the desktop version of *Grouplink for SafestSchools*.

# The *Grouplink* for SafestSchools iPhone/Android Interface

The iPhone and Android are now supported smart phones for the *Grouplink* for SafestSchools application. Using the interface, Principals can create and manage their Incidents directly from their phone.

## Logging In

To log in to the iPhone/Android *Grouplink* for SafestSchools application, simply open a web browser and point it to the *Grouplink* for SafestSchools IP address (***Figure 66***).

*Figure 66*
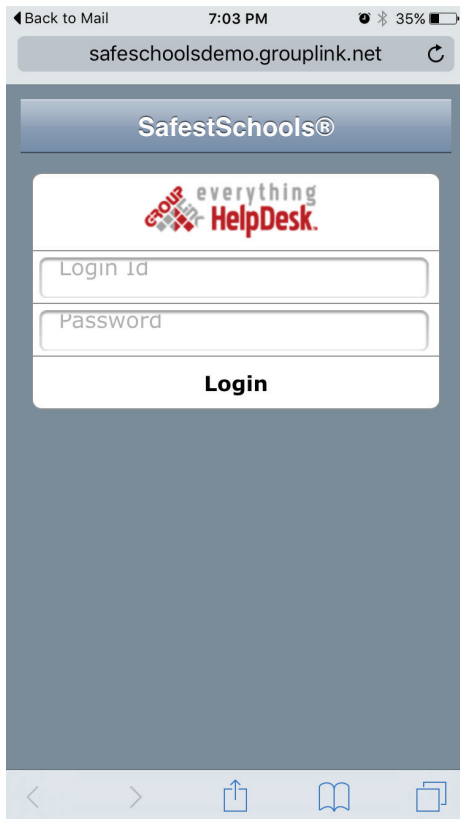
*Figure 67*
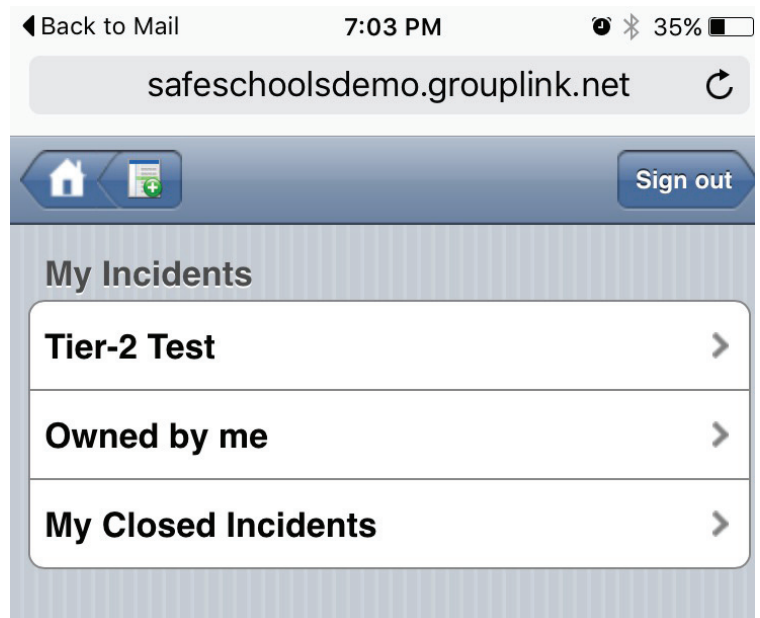
Enter the username and password information exactly as you would on your computer and touch Login. You will be taken directly to the *Grouplink* for SafestSchools iPhone version of the My Incidents screen (***Figure 67***) where all tabs you have created will be listed. To view the Incidents for a particular tab, simply touch the desired tab. To access the My Incidents screen from any other page, press the home icon in the top left corner.

## Sorting Incidents

At the very top you can choose to sort the Incidents by

- **Priority**
- **Id**
- **Contact**
- **Created Date**
- **Modified Date**
- **Location**

## Accessing Incidents

To view an individual Incident, simply touch the Incident you would like to view. The Incident will be pulled up (***Figure 68***) and can be viewed by scrolling through the different sections.

***Figure 68***
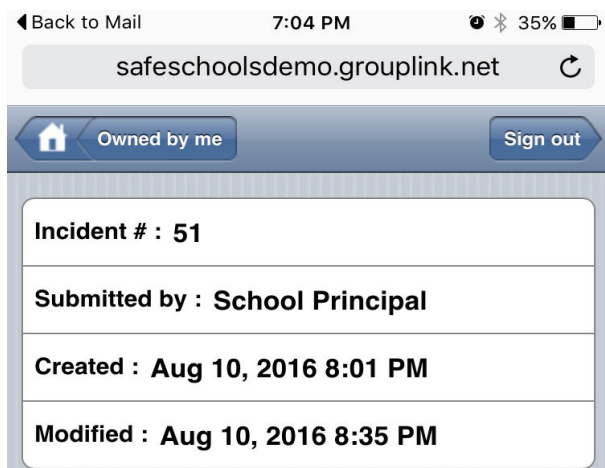


- The top section lists the Incident #, who submitted the Incident, the created date and when it was last modified.
- The Contact Information section lists the name and contact information for the user who is the contact for the Incident. Directly from this section, you have the ability to send an email to or call the contact for the Incident.
- The Incident Info section lists, in order,

  - **Priority**
  - **Status**
  - **Est. Compl. Date**
  - **Location**
  - **Group**
  - **Category**
  - **Category Option**
  - **Assignment**
  - **Any Custom Fields**
  - **Subject**: To scroll through an entire Subject, touch the Subject to enter edit mode, touch and hold in the text box until the magnifying bubble appears and move your finger slowly to the right or left.
  - **Note**: To scroll through an entire Note, use two fingers and drag the note upward to view the lower end.

Below this information is the Save Changes button. When you have made any desired changes to the Incident, press this button and the changes will be saved.

The History Comments button is at the bottom of the page. To view the History Comments, press the button and you will be directed to a separate page for the History Comments. From this page, press the Add comment button to pull up a list of the following History Comment template options:

- **Add comment**: This option will pull up a new blank History Comment which you can fill out, choose to notify the Principal and/or user, and save.
- **Received a phone call**: This will automatically fill the Subject line with the Date and Time and show that a phone call was received about the Incident.
- **Placed a phone call**: When a phone call is placed about the Incident, this option will automatically fill the Subject of the History Comment with the date and time the phone call was placed.
- **Schedule an appointment**: This selection will open an appointment for the contact of the Incident.

  - Add people in your organization to the appointment as well as CC or BC anyone in the organization.
  - Enter the Place where the appointment will be held.
  - Select a Start Date from the scrolling calendar that pulls up with this option.
  - Select the Start Time for the appointment.
  - Select the Duration for however long you need the appointment to last.
  - Mark the calendars of the people involved with the appointment as Free, Tentative, Busy, or Out of Office.
  - Add a Subject and/or Note as desired.
  - You can choose whether or not to notify the Principal and/or User of the Incident.

  When you have filled out the information, press the Save Changes button to post the appointment.
- **Schedule a task**: This screen is similar to the screen of the Schedule an Appointment option. Fill out the fields in the screen and push the Save Changes button at the bottom to post the task.
- **Cancel**: Selecting the Cancel button will cancel the Add History Comment action.

## Create a New Incident

To create a new Incident using the iPhone press the Create New Incident icon  next to the home icon in the top left corner of the screen. The new Incident will display on the screen with the following information:

- **Incident #**: It will be listed as New Incident.
- **Submitted by**: The information here will belong to the logged in user.
- **Created**: This will list the created date.
- **Modified**: Because this is a new Incident, the Modified date will be the same as the Created date.
- **Contact Information**: The Contact Information listed in this section will belong to the logged in user. This can be changed by touching the down arrow at the end of the row and selecting a new Contact from the list.

- **Incident Info**:
    - **Priority**: To change the Priority of the Incident, touch the down arrow at the end of the Priorityrow and select a new Priority.
    - **Status**: To change the Status of the Incident, touch the down arrow at the end of the Status row and select a new Status.
    - **Est. Compl. Date**: This field will auto-fill with the current date. To change the date, touch the over arrow at the end of the row and a scrolling calendar will appear. Select the desired Year, Month, and Day and touch the Done button.
    - **Location**: Touch the down arrow at the end of the row, select your Location from the list that appears, and touch the Done button.
    - **Group**: Select the Group that is relevant to your Incident and touch the Done button.
    - **Category**: Select the Category that is relevant to your Incident and touch the Done button.
    - **Category Option**: Select the Category Option that is relevant to your Incident and touch the Done button.
    - **Assignment**: Select the Assignment that is relevant to your Incident and touch the Done button.
    - **Custom Fields**: Fill in any other Custom Fields set by your organization and touch the Done button.
    - **Subject**: Enter a Subject as you would in an incident on your computer and touch the Done button.
    - **Note**: Enter a Note as you would in an incident on your computer and touch the Done button.

Once all of this information is filled out, touch the Save Changes button. A Save successful message will appear at the top of the screen and your new Incident will appear under the Owned by me section of *Grouplink for SafestSchools* both on your iPhone/Android and your computer.

## Sign Out
To sign out of the application, press the **Sign Out** button Sign out in the top right corner of the screen.