SIMULATIONiQ™ Enterprise

Settings

Education Management Solutions, LLC
436 Creamery Way, Suite 300
Exton, PA 19341
Phone: 877.EMS.5050 (877.367.5050)
www.SIMULATIONiQ.com

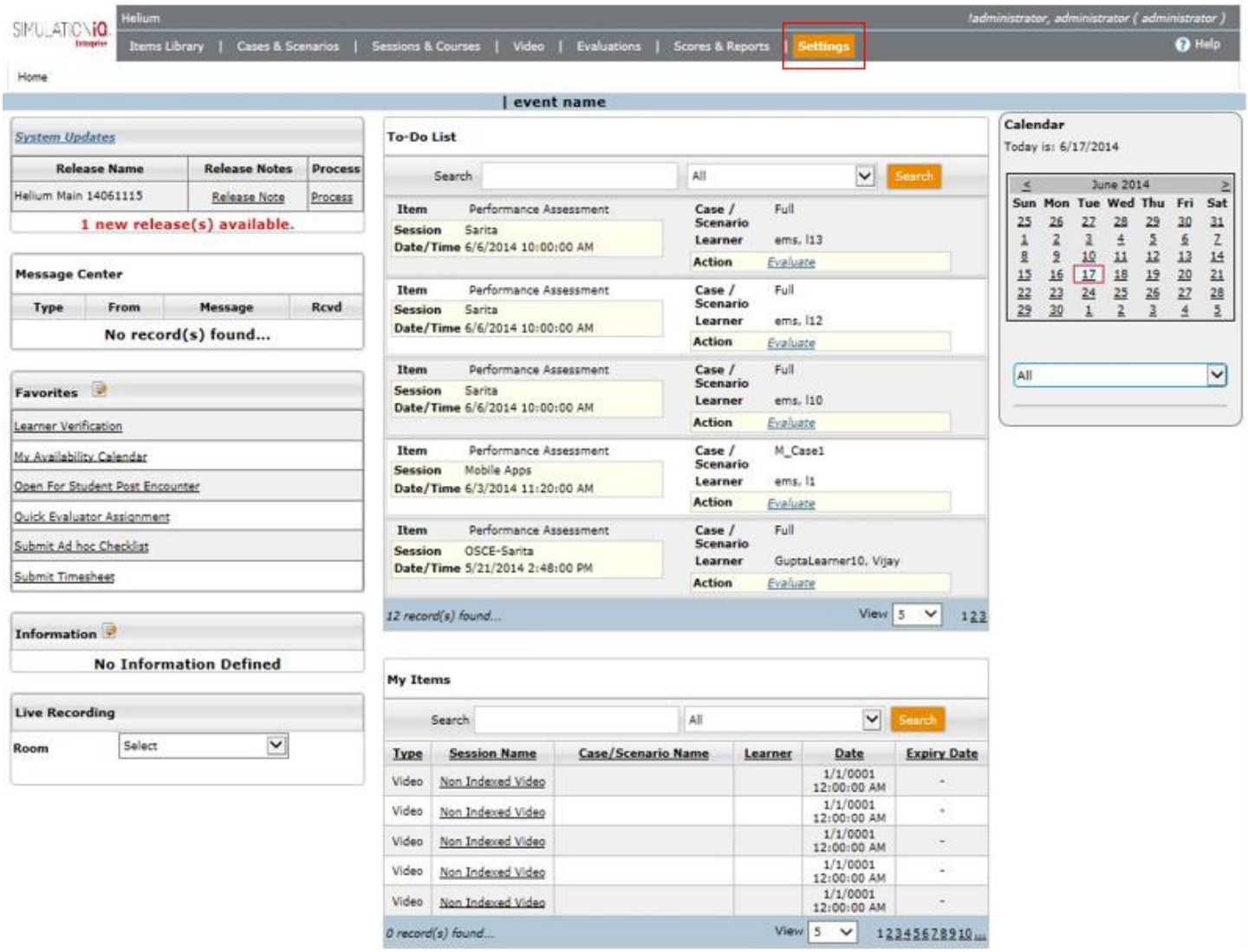
Contents

Settings

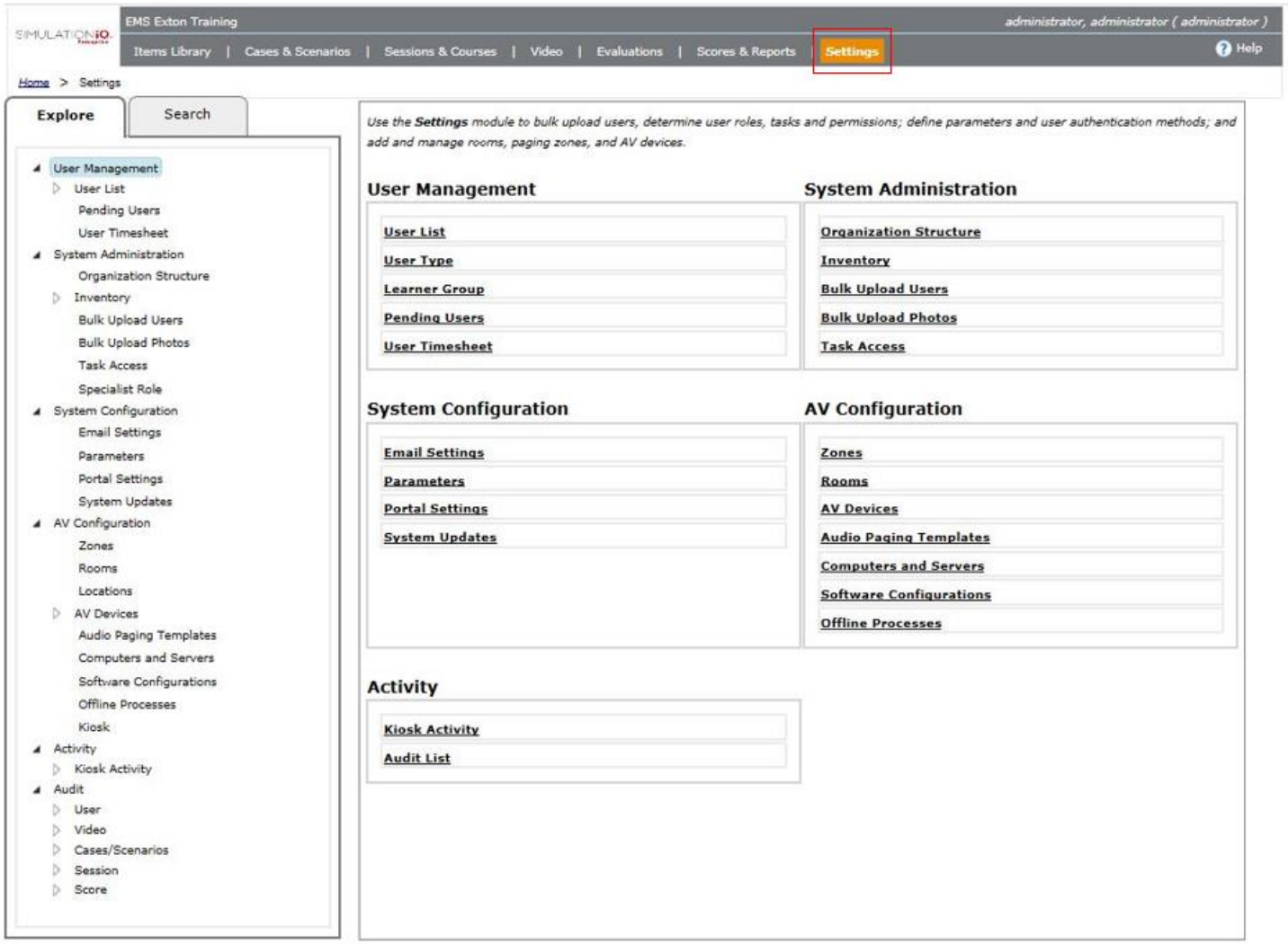
Note: All data contained in the grids in this documentation is for demonstration purposes only.

You are able to adjust or set many of your system's settings. Your EMS Support Administrator may have already configured some system settings for your account, and your Administrator can configure any remaining settings. **Administrators are the only users who can access and make changes to system settings.**

Select **Settings** from the menu bar accessed from the SIMULATIONiQ Enterprise Dashboard as shown in the next graphic. You can find a setting by using either the "Search" or "Explore" tabs.

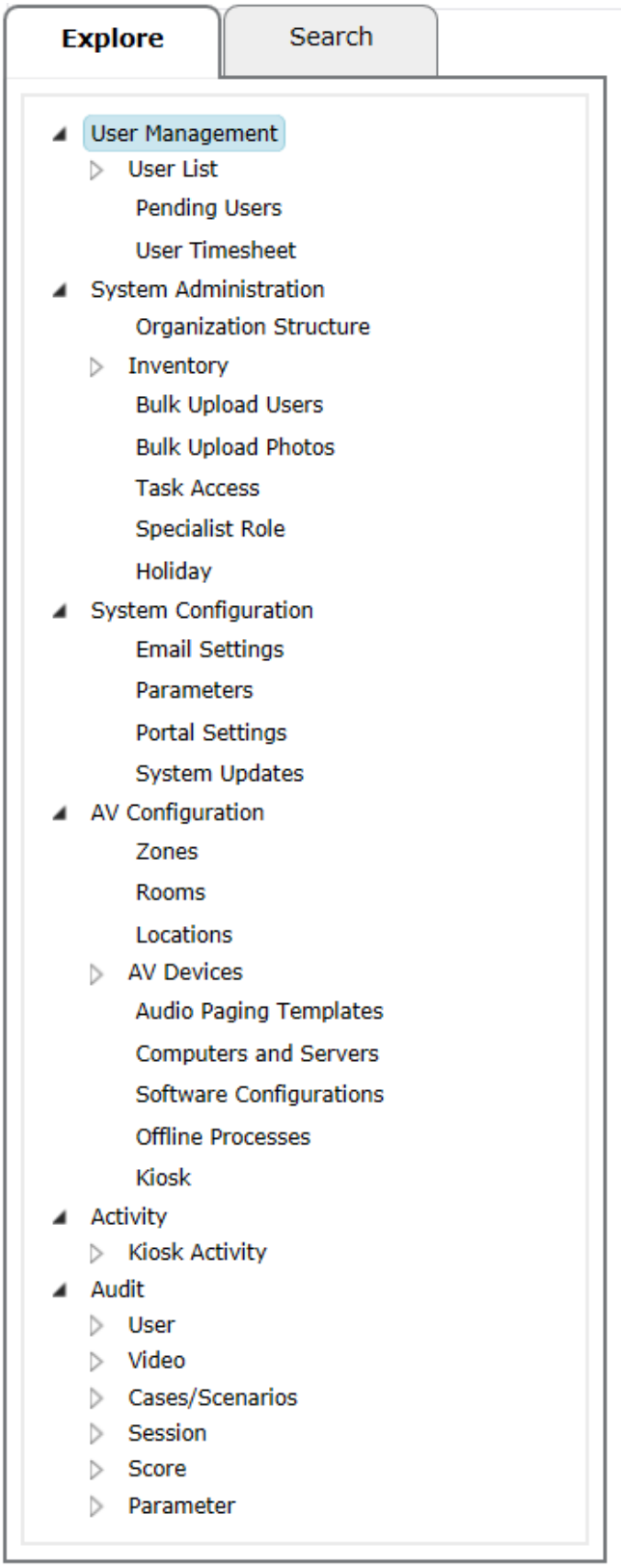


The following menu selections are available from the **Settings** Landing Page:



Explore Tab

The following **Settings** selections are available from the **Explore** tab :



Search Tab

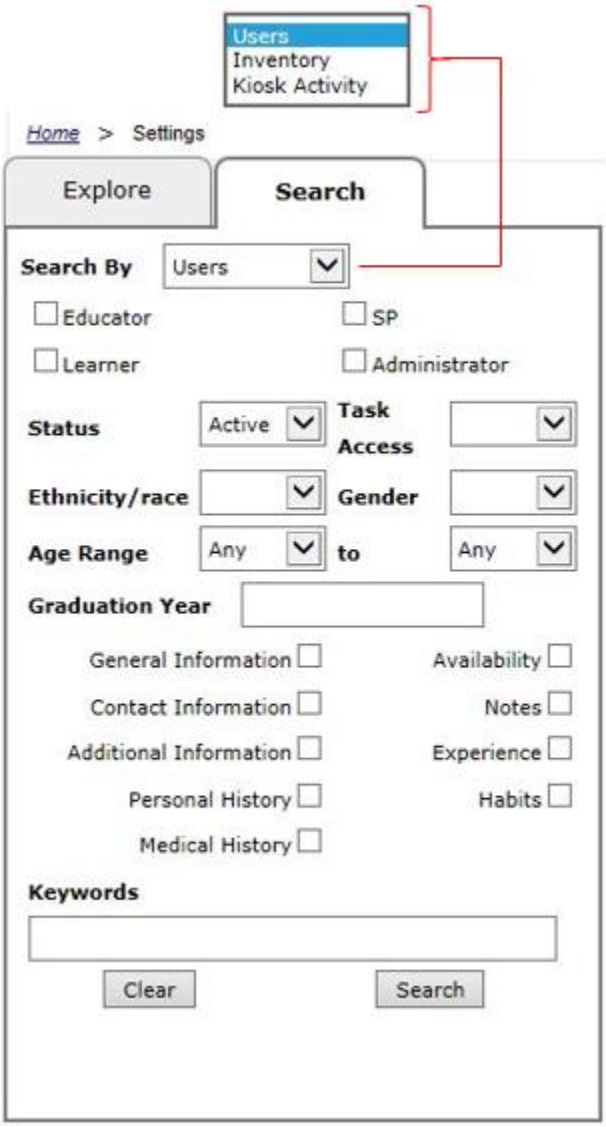
The following **Settings** selections are available from the **Search** tab:

- Users
- Inventory
- Audit

Note, if you have purchased the Kiosk, you will be able to search here for the Kiosk also.

Search Users

You can search for users by choosing “Users” in the “Search By” drop down.



You can select or enter the following information to narrow your search:

Field	Description
Search By	Select **Users** from the drop-down list. Narrow your search by selecting any of the following checkboxes: • Educator • Learner • SP • Administrator
Status	Select **Active, Retired**, **Pending** or **Rejected** (defaults to **Active)**.

	Note: It is recommended that you assign a status of Retired to a user who may no longer be in your application, though data may still be assigned to this person.
Task Access	Click the applicable checkbox if searching for a user by one of the following user types: **Administrator, Faculty, SP** or **Student** (as well as other task access types you may have created).
Ethnicity/Race	Select **White**, **African American**, **American Indian**, **Asian**, or **Other**
Gender	Select **Male** or **Female**
Age Range	Select a numeric range of ages that may include the user(s) (defaults to **Any**).
Graduation Year	Enter the graduation year of the user included in your search.
Keywords	Enter any keywords to customize your search.

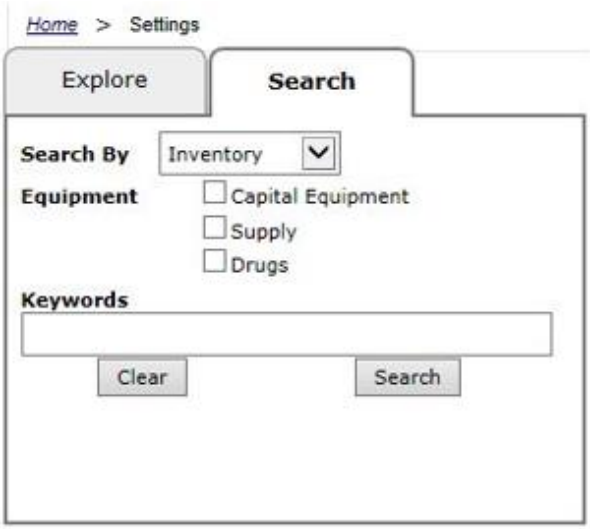
Also, click any of the following checkboxes to further narrow your search:

- General Information
- Contact Information
- Additional Information
- Personal History
- Medical History
- Availability
- Notes
- Experience
- Habits

Click **Clear** to remove your search criteria and start again; click **Search**, and the results will appear in the Landing Page grid.

Search Inventory

You can search for inventory by choosing “Inventory ” in the **Search By** drop down.



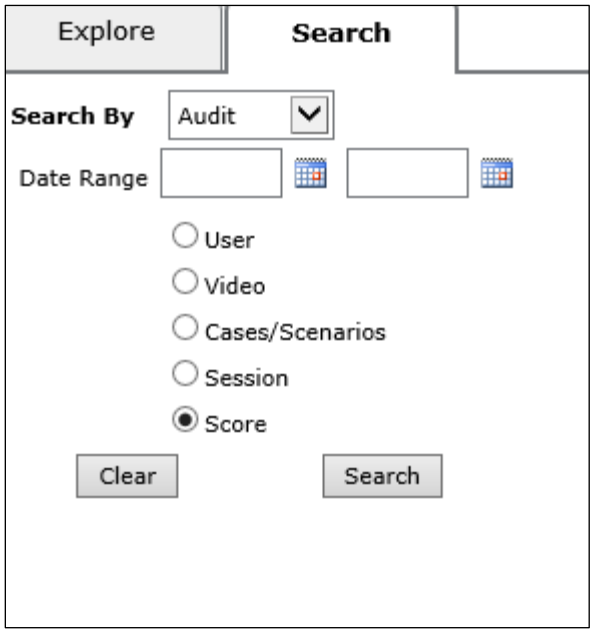
Select or enter the information as follows:

Field	Description
Search	Select **Inventory** from the drop-down list. Narrow your search by selecting any of the following checkboxes: • Capital Equipment • Supply • Drugs
Keywords	Enter any keywords to customize your search.

Click **Clear** to remove your search criteria and start again; click **Search**, and the results will appear in the Landing Page grid.

Search Audit

You can search Audits by choosing “Audit ” in the **Search By** drop down.



Field	Description
Date Range	Select the start date for the range by on the first calendar icon. Select the end date by clicking on the second calendar. You may also type in the date ranges in the empty boxes.
Types of Audit	Select the radio button in front of the type of audit you want to search: user, Video, Cases/Scenarios, Session or Score.

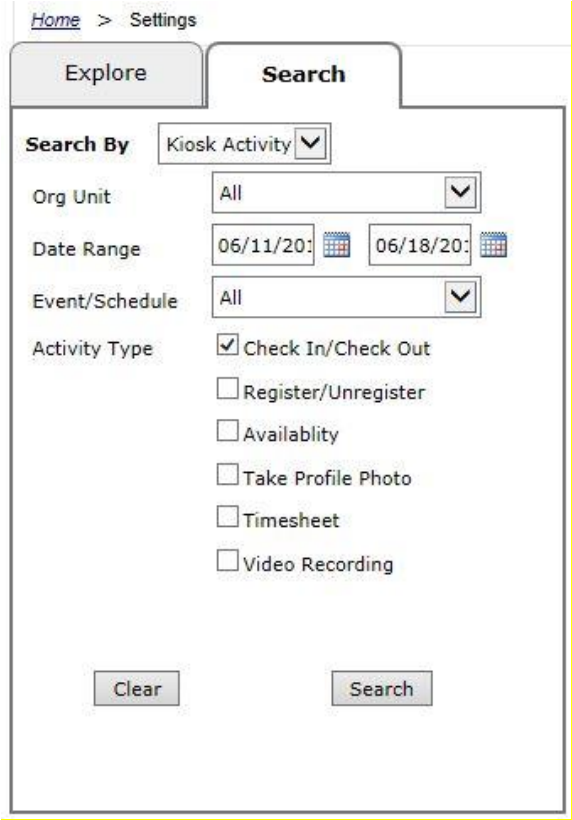
Make your selection and then Click the **Search** icon at the bottom of the section.

Click **Clear** to remove your search criteria and start again; click **Search**, and the results will appear in the Landing Page grid.

Search Kiosk

Note: This selection is available if you have purchased a Kiosk for your institution.

You can search for a kiosk by choosing “Kiosk Activity” in the “Search By” drop down.



You can select or enter the following information to narrow your search:

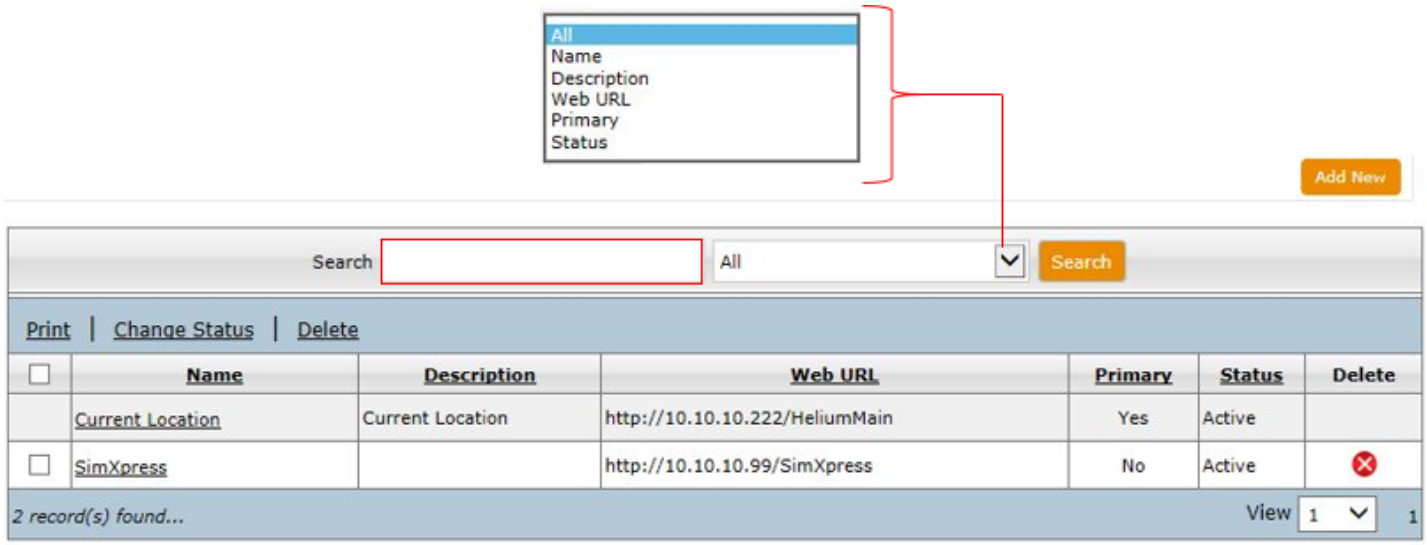
Field	Description
Organization Unit	Select the organization unit for your institution or All from the drop-down list.
Date Range	Enter or select a From and To date range to view Kiosk activity.
Event/Schedule	Select an event/schedule of Kiosk activity from the drop-down list.
Activity Type	Click a checkbox to view any of the following Kiosk activity types: • Check In/Check Out • Register/Unregister • Availability • Take Profile Photo • Timesheet • Video Recording

Click **Clear** to remove your search criteria and start again; click **Search**, and the results will appear in the Landing Page grid.

Searching in SIMULATIONiQ Enterprise

You can also search within SIMULATIONiQ™ Enterprise generally, and the **Settings** module in particular, by entering values at the **Search** text field on the near the top center of the Landing Page and/or selecting column titles from the grid, as shown:

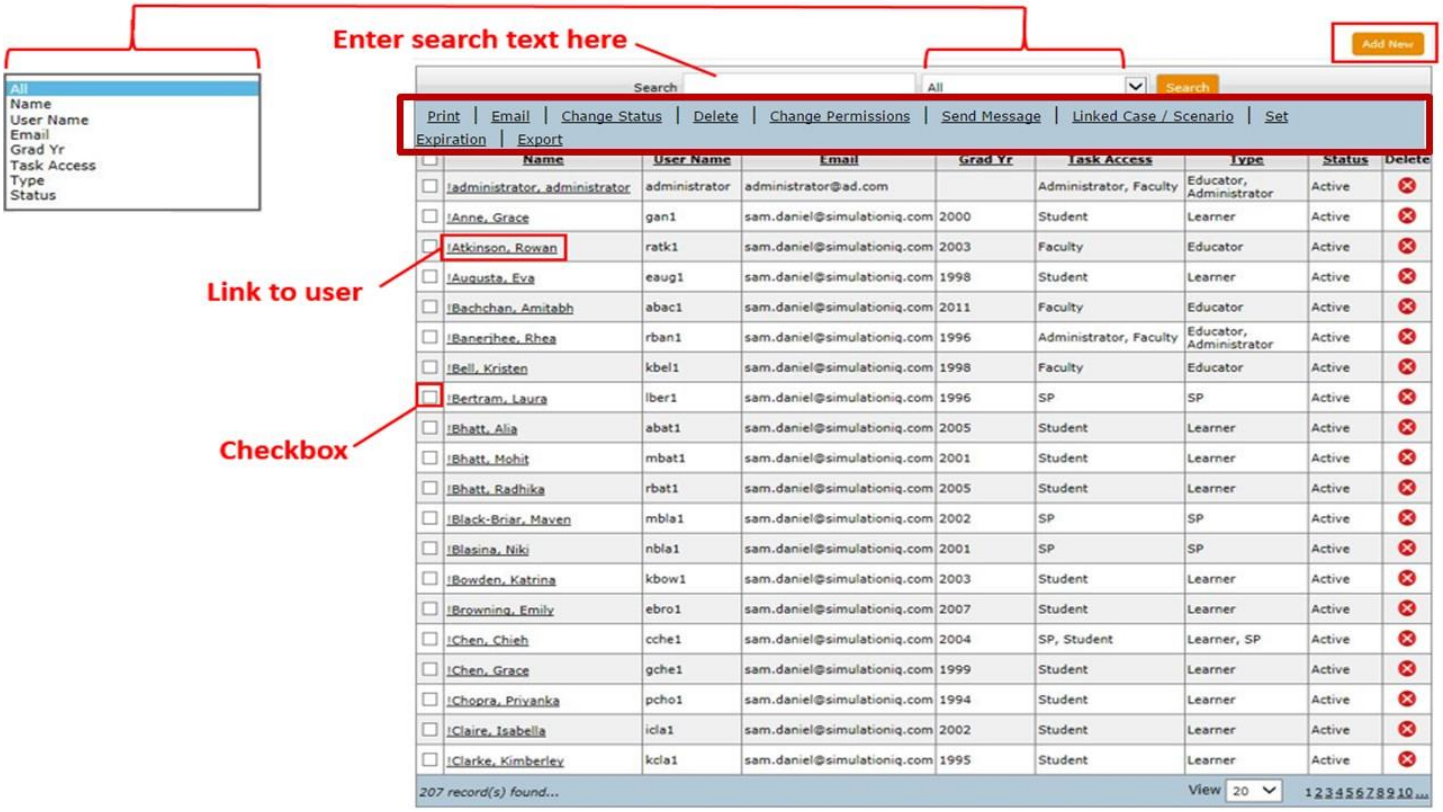
Note: The blue action bar selections (Print, Change Status, and Delete, as shown below) vary within SIMULATIONiQ Enterprise modules, including Settings.



User Management

User List

Click **User List** from the **Explore** tab; the following grid appears:

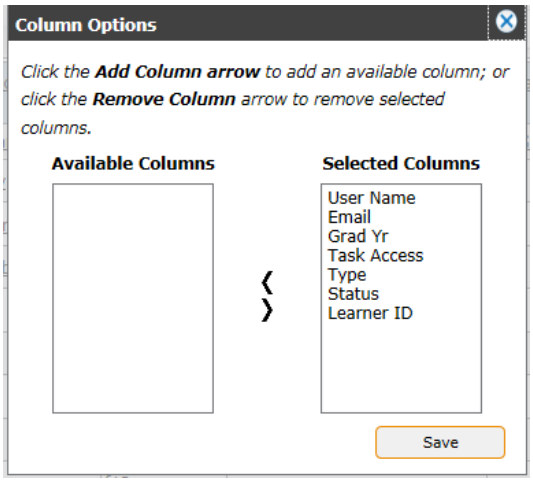


Name	User Name	Email	Grad Yr	Task Access	Type	Status	Delete
!administrator, administrator	administrator	administrator@ad.com		Administrator, Faculty	Educator, Administrator	Active	
!Anne, Grace	gan1	sam.daniel@simulationiq.com	2000	Student	Learner	Active	
!Atkinson, Rowan	ratk1	sam.daniel@simulationiq.com	2003	Faculty	Educator	Active	
!Augusta, Eva	eaug1	sam.daniel@simulationiq.com	1998	Student	Learner	Active	
!Bachchan, Amitabh	abac1	sam.daniel@simulationiq.com	2011	Faculty	Educator	Active	
!Banerjhee, Rhea	rban1	sam.daniel@simulationiq.com	1996	Administrator, Faculty	Educator, Administrator	Active	
!Bell, Kristen	kbel1	sam.daniel@simulationiq.com	1998	Faculty	Educator	Active	
!Bertram, Laura	lber1	sam.daniel@simulationiq.com	1996	SP	SP	Active	
!Bhatt, Alia	abat1	sam.daniel@simulationiq.com	2005	Student	Learner	Active	
!Bhatt, Mohit	mbat1	sam.daniel@simulationiq.com	2001	Student	Learner	Active	
!Bhatt, Radhika	rbat1	sam.daniel@simulationiq.com	2005	Student	Learner	Active	
!Black-Briar, Maven	mbla1	sam.daniel@simulationiq.com	2002	SP	SP	Active	
!Blasina, Niki	nbla1	sam.daniel@simulationiq.com	2001	SP	SP	Active	
!Bowden, Katrina	kbow1	sam.daniel@simulationiq.com	2003	Student	Learner	Active	
!Browning, Emily	ebro1	sam.daniel@simulationiq.com	2007	Student	Learner	Active	
!Chen, Chieh	cche1	sam.daniel@simulationiq.com	2004	SP, Student	Learner, SP	Active	
!Chen, Grace	gche1	sam.daniel@simulationiq.com	1999	Student	Learner	Active	
!Chopra, Priyanka	pcho1	sam.daniel@simulationiq.com	1994	Student	Learner	Active	
!Claire, Isabella	icla1	sam.daniel@simulationiq.com	2002	Student	Learner	Active	
!Clarke, Kimberley	kcla1	sam.daniel@simulationiq.com	1995	Student	Learner	Active	

Grid Options

Note: As with all search grids, you can enter a value at the text field and either search across all column headings or select individual column headings from the drop-down list next to the **Search** button. You can also click the hyperlinked column headings (denoted with an underline) and sort the grids by that heading, such as **Name** in the previous grid.

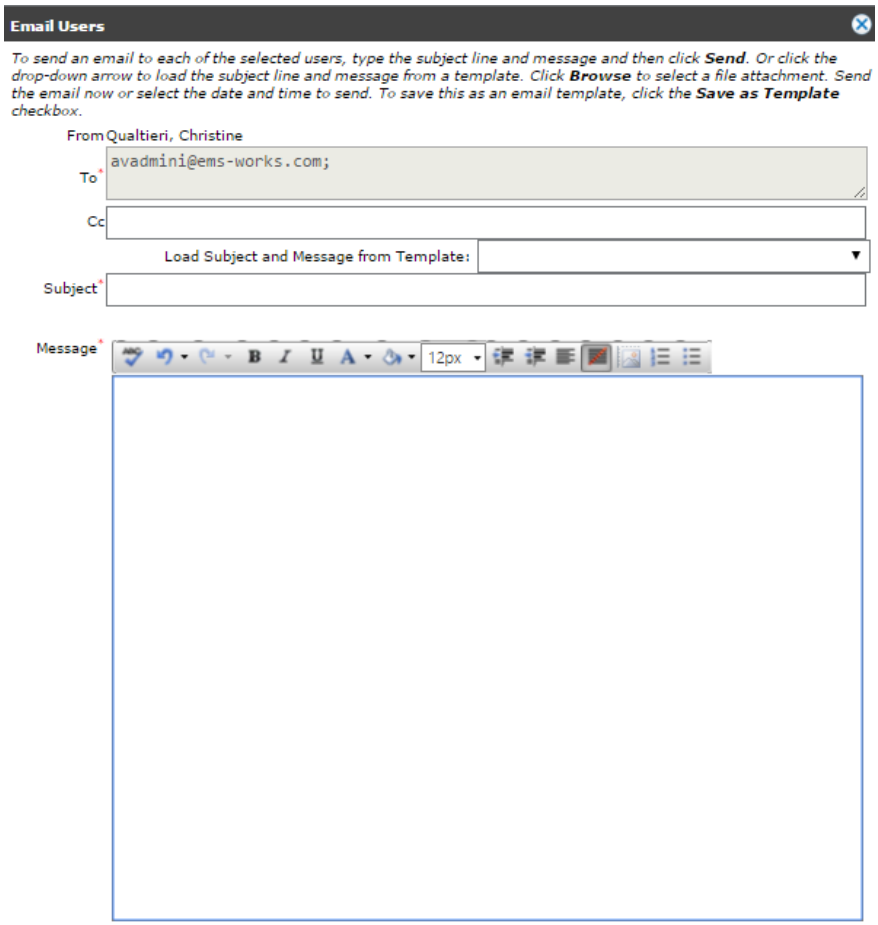
Click the checkbox to left of the **User Name** to access any of the following action bar functions:



- **Column Options** – Add, remove and sort the order of the columns in grid view.

- **Print** – This prints User Profile details.

- **Email** – Use this to enable Email functionality; the following dialog appears:

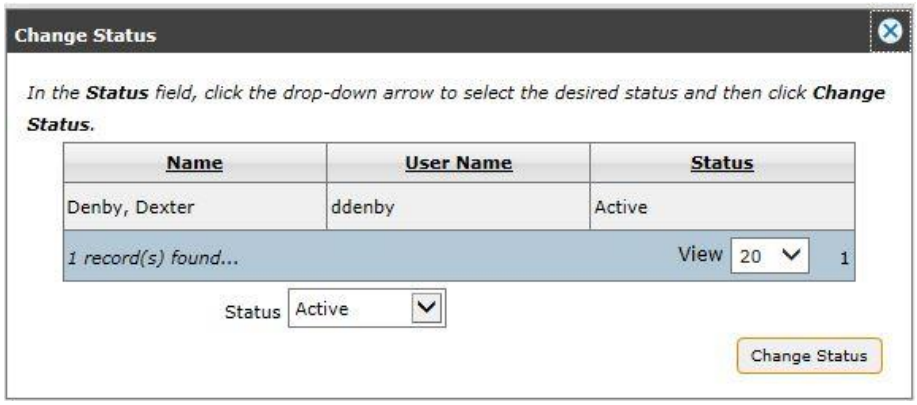


Enter the following information:

Field	Description
From	The username of the individual logged onto SIMULATIONiQ Enterprise appears.
To*	The individual selected at the Landing Page grid appears.
Cc	Enter any other users to be copied on this Email.
Load Subject and Message from Template	Select a message template that can be edited as appropriate (from **System Configuration/Email Settings**).
Subject*	Enter the subject of the Email.
Message*	Enter the body of the Email message.
Attachments	Click **Attach** to search for a file to include with the Email. After selecting the file, click **Upload** and **Save Changes** to include the file (appearing in the Attachments grid).
Schedule	Click the **Send Now** radio button or select a date
Save as Template	Click this field to save your Email message as a template for further use.
*- required field	

Click **Send** to deliver the message after making your selections.

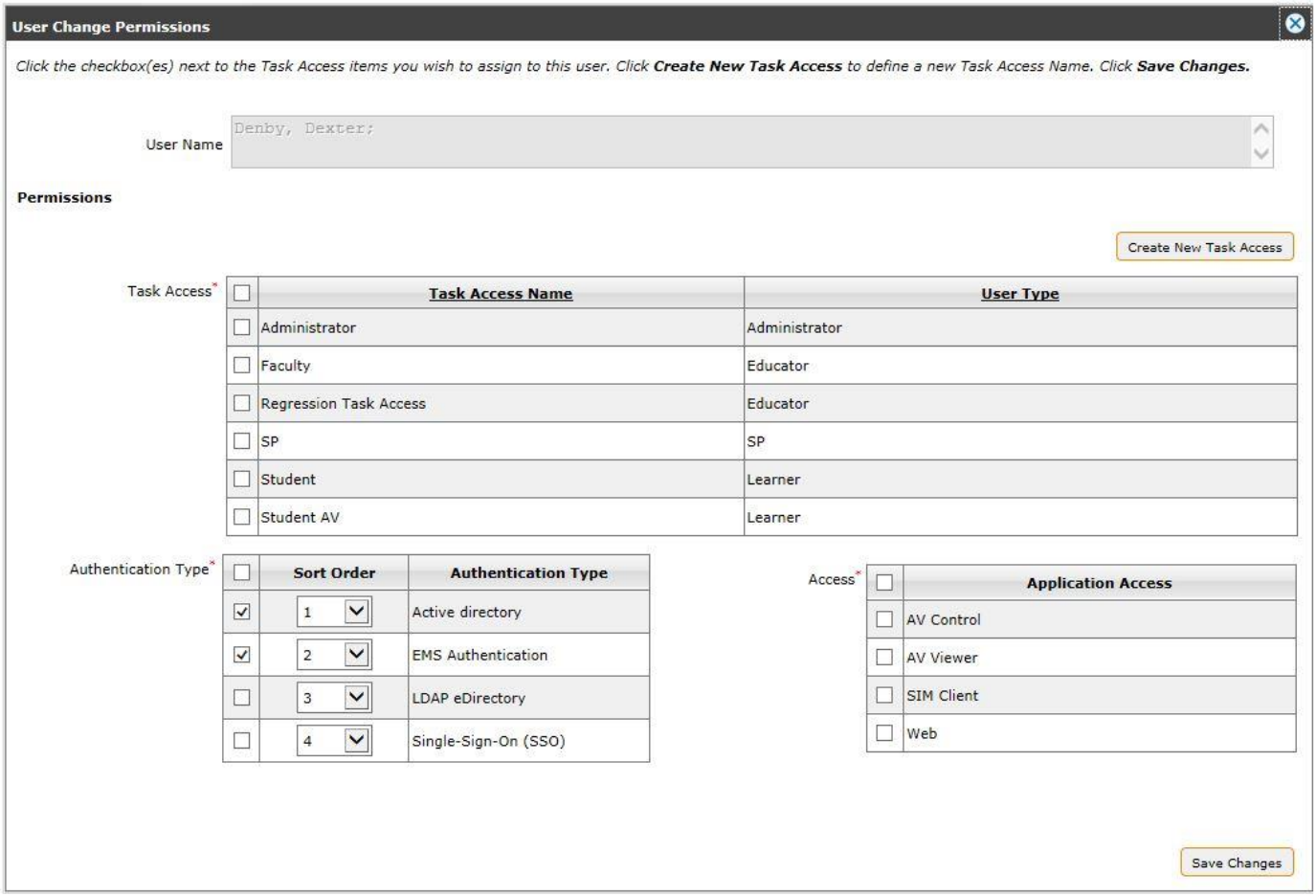
- **Change Status** – This selection calls up the following dialog:



Select either **Active** or **Retired** from the drop-down list. Click **Change Status** to retain your new selection.

- **Delete** – This deletes the selected user. You will receive an “Are you sure. . . “ message before deleting.

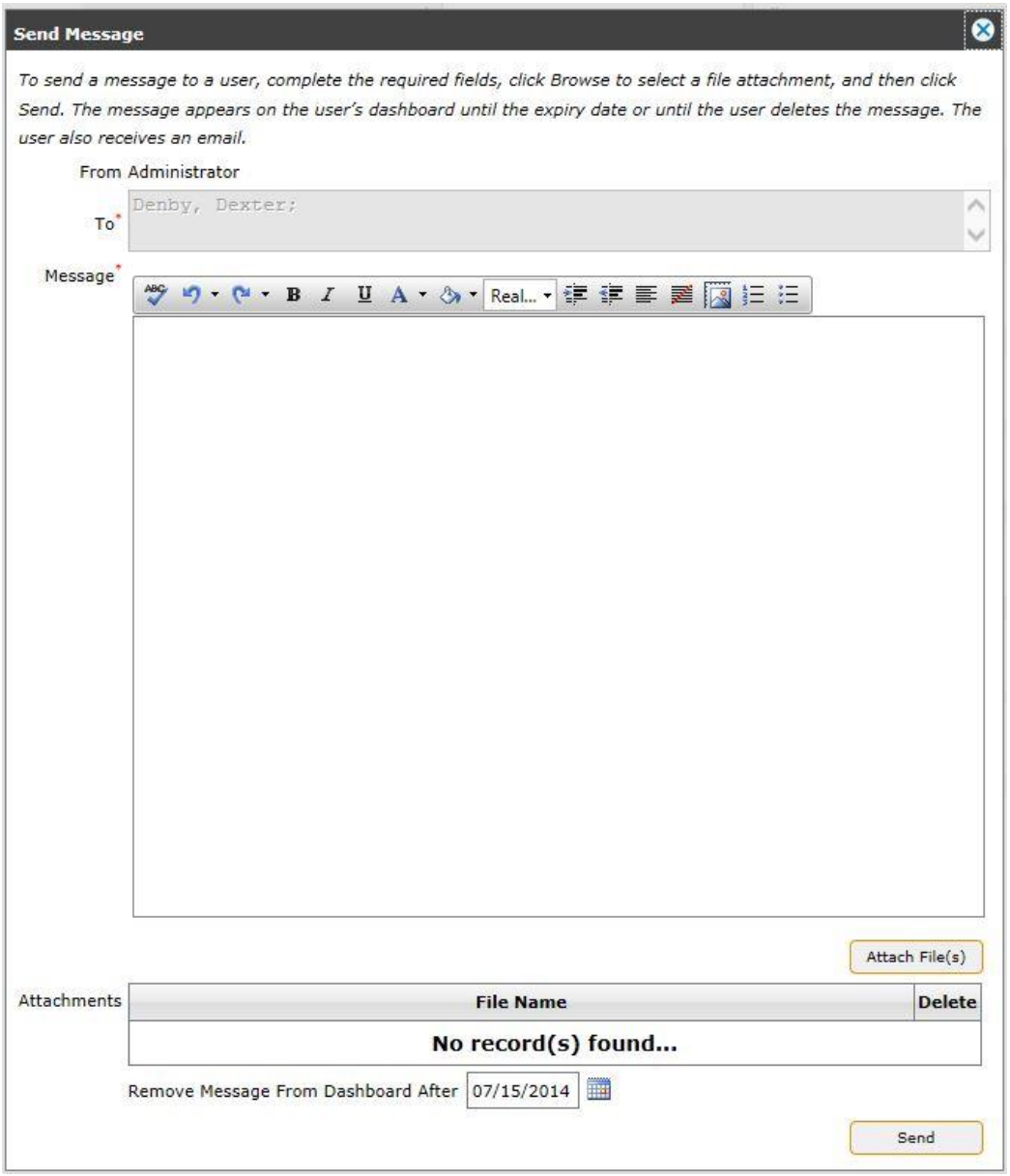
- **Change Permissions** – Use this functionality to change Authentication Methods or Task Access, as follows:



Note: When making a Task Access selection, the dialog box opens further to enable Organization Unit and Learner Group selections; more information on this functionality appears later in Settings.

Click **Save Changes** to retain your selections.

- **Send Message** – Use this to send a message to the user selected at the Landing Page grid, as follows:



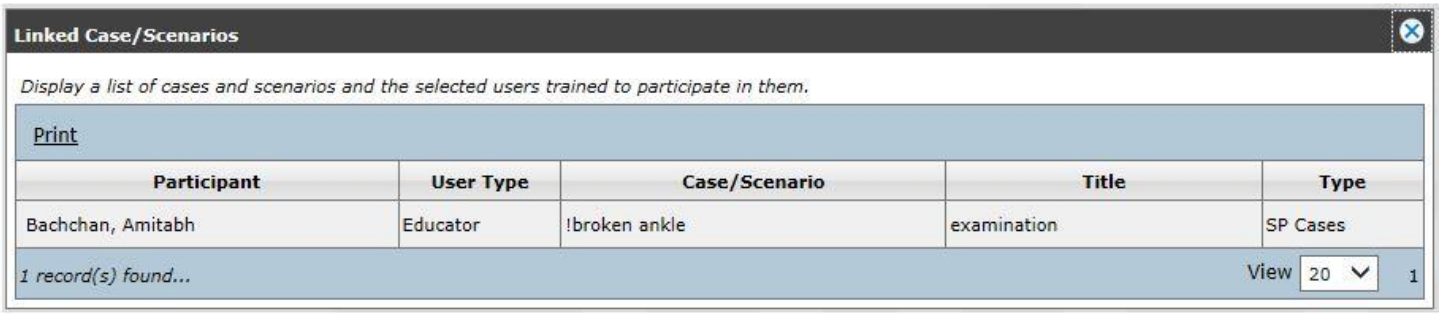
Enter the following information:

Field	Description
From	Administrator appears as the default.
To*	If a checkbox has been clicked next to a user on the Landing Page grid, the user name appears in the To field.
Message*	Enter the message text; use the toolbar icons to modify or format text if desired.
Attachments	Include any attachments with the message here.
Remove Message	Select a date from the calendar icon or enter a date at the text field; this indicates the date that the message will be removed from the dashboard.

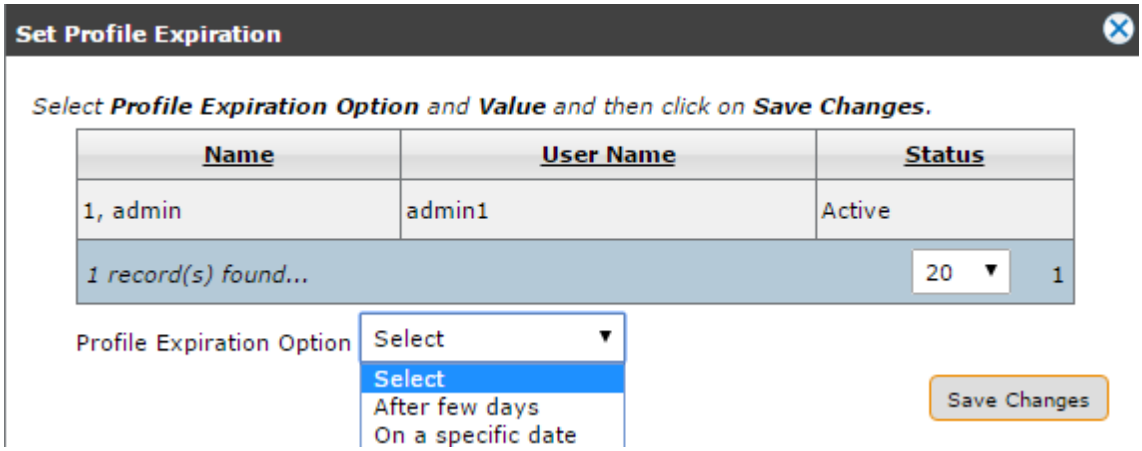
From Dashboard	
*- required field	

After entering the message text and attaching any files, click **Send**. The message appears on the dashboard of the user in the **To** box (To and Message values are required).

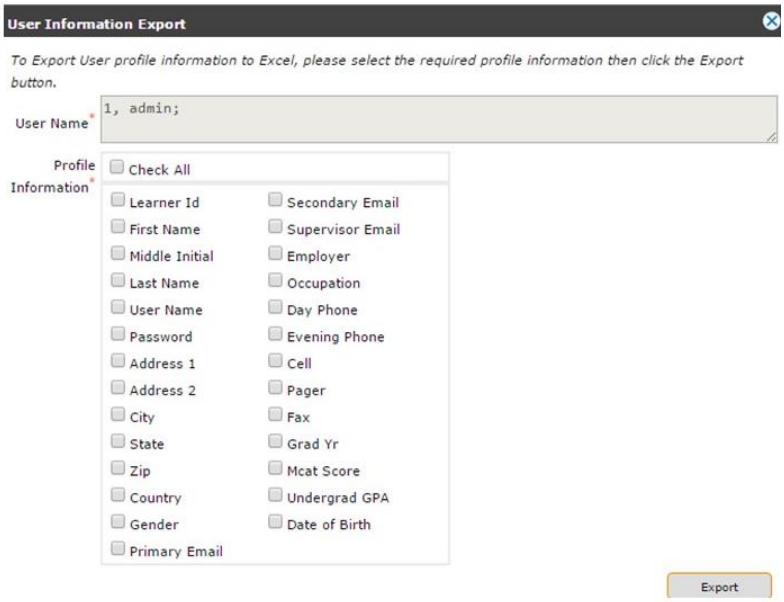
- **Linked Case/Scenario** – Click the checkbox next to the Name column and click the Linked Case/Scenario link to determine if the user has been linked to a case or scenario for training purposes. This is a Read only screen. The following sample dialog appears:



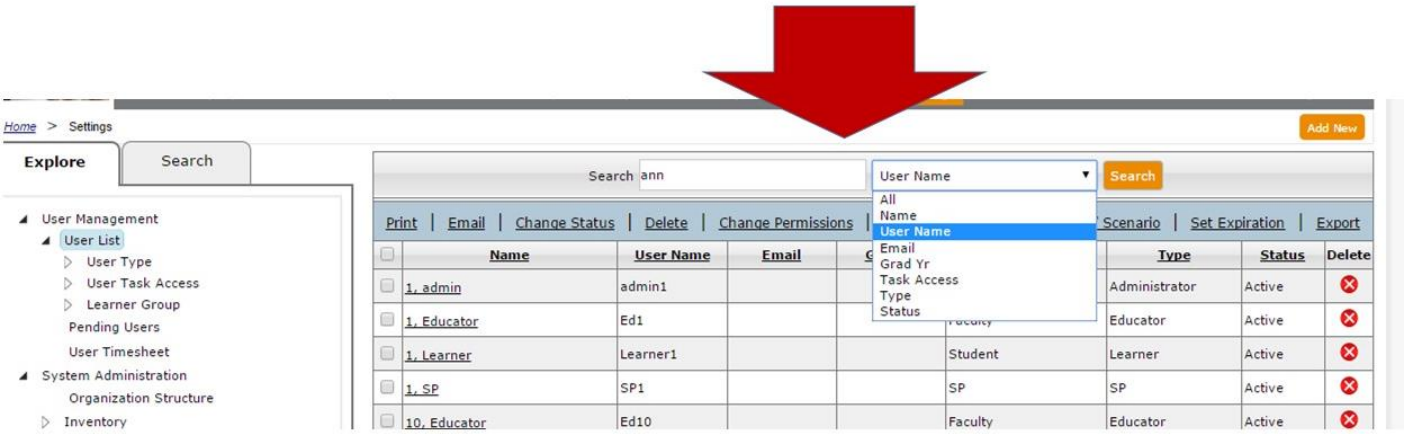
- Set Expiration- Click the checkbox next the name column and click the Set Expiration link to set the expiration date for an account to be active.



- Export – User profile information can be exported from the system into an excel file. You can select the type of information you want to export before hitting the Export button at the bottom of the message box.



If you would like to search for a learner, you can choose to filter by several categories. Type your search term in the Search box and choose your filter option from the drop down.



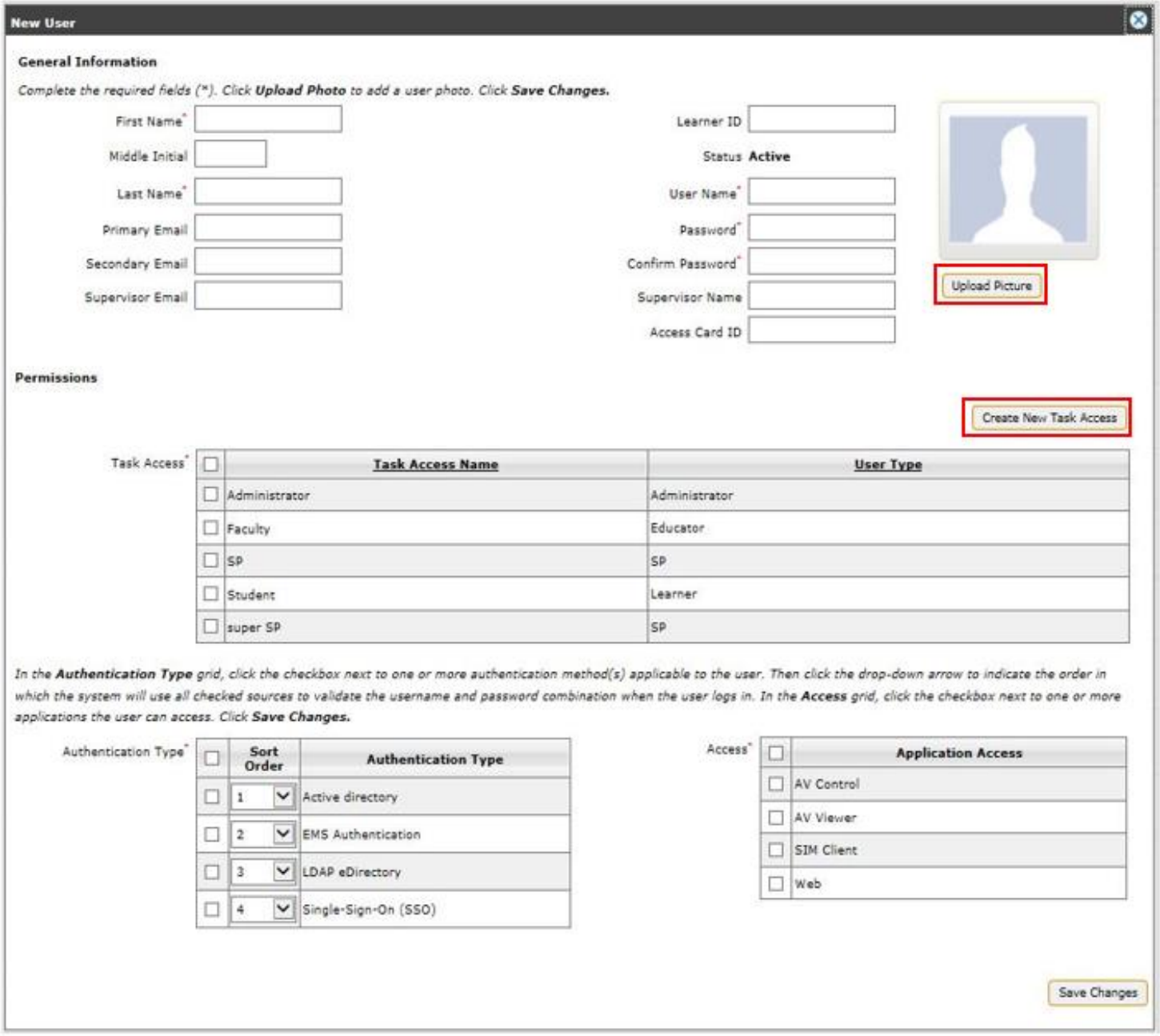
The results will appear as a list with the following columns:

Field	Description
Name	This is the full name of the user.
User Name	This is the abbreviated name for the user to log onto SIMULATIONiQ Enterprise.
Email	This is the user's email address.
Grad Yr.	This is the graduation year if the user is a learner.
Task Access	This is the user's task access (Administrator, Faculty, SP, Learner, or any other Task Access type created by your administrator).
Type	This is the type of user; default types enable particular system activity based on module access (e.g., only administrator types can access Settings).
Status	Users appear with a status of either **Active**, **Retired**, **Pending**, or **Rejected** (users can also be searched by status at the **Search** tab in the left column next to the grid).
Delete	Click the checkbox and click this icon next to the user name (click **OK** at the Confirmation message to delete the user).

Note: Within this grid, you can search for users by Administrator, Educator, SP, and Learner under Type. Overlap is allowed between user roles if a user is assigned to multiple roles.

To select an existing user, navigate to the **User List** grid and click a link under the **Name** column. The **User Profile** page appears.

To add a user, click the **Add New** button appearing in the upper right corner of the Landing Page. The following appears:



The following information about a user can be added. Note, that those fields with the red asterix * are mandatory.

General Information

Field	Description
First Name*	Enter the user's first name.

Field	Description
Middle Initial	Enter the user's middle initial.
Last Name*	Enter the user's last name.
Primary Email	Enter the user's primary Email address.
Secondary Email	Enter the user's secondary Email address, if available.
Supervisor Email	Enter the user's supervisor's Email address.
Learner ID	Enter an ID alphanumeric for the user. **Note**: If a learner does not have an ID and the Learner ID checkbox is checked when generating a report, the Learner field will appear blank.
Status	Select **Active**, **Retired**, **Pending** or **Rejected** from the drop-down list.
User Name*	Enter the username to be used when logging onto SIMULATIONiQ Enterprise.
Password*	Enter the user password; the password must be at least 6 characters and must have at least one letter, one number, and one special character.
Confirm Password*	Enter the user password again to confirm.
Supervisor Name	Enter the user's supervisor's name.
Access Card ID	Enter the Access Card ID if it is used to access the application.
*-required field	

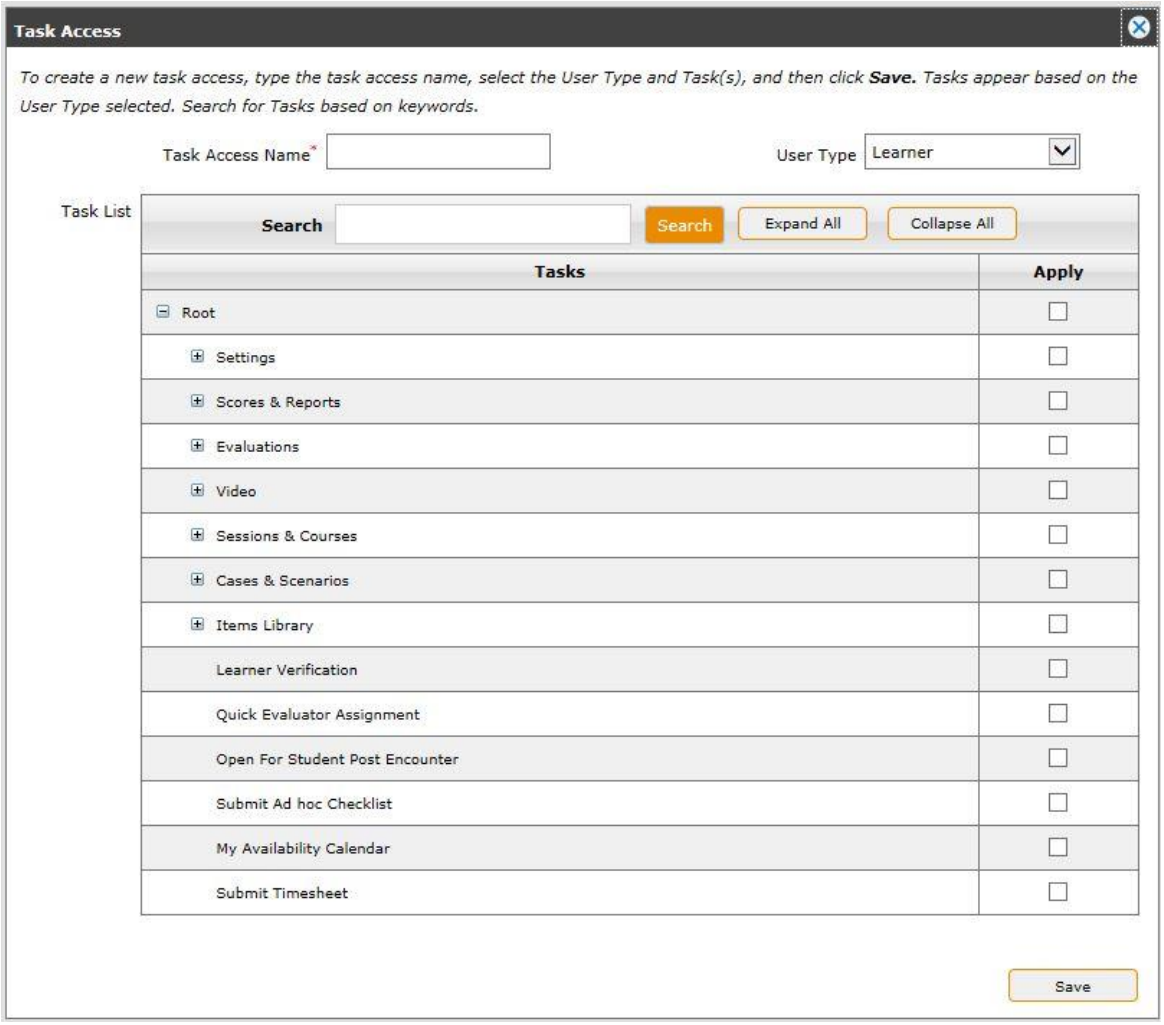
Permissions

Field	Description
EMS Admin	This enables a user to access all functionality.
Faculty	This enables a user to access all functionality except Settings.
Admin	This enables a user to access all functionality except AV Device access to Settings.
SP	This enables a user to access only the Session Calendar/User Availability module of SIMULATIONiQ Enterprise.
Student	This enables a user to access the Scores & Reports modules, as well as videos or checklists that may be assigned to that student.

You can also upload a picture of the user in .bmp, .gif, .jpg, .jpeg, .png, .zip or .tif formats by clicking the **Upload Picture** button.

Note: A Task Access/User Type must be selected first prior to adding permissions.

Click the **Create New Task Access** button to call up the following dialog:



Enter a new **Task Access Name** at this dialog and assign module functionality as desired (i.e., Video, Evaluations, Scores & Reports, etc.). Select a **User Type** based on an existing selection or a new type you have created. Click **Save** to retain your selections and return to the **New User** dialog (the new Task Access will appear in the **Task Access Name** column with your selections – this is a mandatory selection).

At the **Task Access** section of the **New User** page, click the following checkboxes by Task Access Name as appropriate for the user (**Note**: Admin, Faculty, SP and Student are default Task Access groups):

Field	Description
EMS Admin	This enables a user to access all SIMULATIONiQ Enterprise functionality.
Admin	This enables a user to access all functionality except AV Device access to Settings.
Faculty	This enables a user to access all functionality except Settings.
SP	This enables a user to access only the Session Calendar/User Availability module.
Student	This enables a user to access the Scores & Reports modules, as well as videos or checklists that may be assigned to that student.

The **Authentication Type** selections appear after the **Task Access** checkboxes. Choose any of the following selections as appropriate (the sort order automatically changes based on user selections – this is a mandatory selection):

Field	Description
Active Directory	This authenticates and authorizes all user and computers in a Windows-domain network, assigning and enforcing security policies for all computers and installing or updating software.
EMS Authentication	The user must have this authentication to access the application.
LDAP eDirectory	This stands for Lightweight Directory Access Protocol, used for accessing and maintaining distributed directory information services over an Internet Protocol (IP) network.
Single Sign-On (SSO)	This enables a user to log in once and gain access to all systems without being prompted to log in again at each of them, depending on the user's network security policy.

The **Access** selections appear after the Authentication Type checkboxes. Choose any of the following selections as appropriate (this is a mandatory selection):

Field	Description
AV Control	This enables the user to access the AV Control application (for EMS Administrators and Administrators).
AV Viewer	This enables the user to access the AV Viewer application (for EMS Administrators, Administrators, and Educators).
SIM Client	This enables the user to access the SIM Client application (for EMS Administrators and Administrators).
Web	This enables a user to log in once and gain access to the Web application (for access by all EMS default task groups).

Click **Save Changes** after you have made your selections.

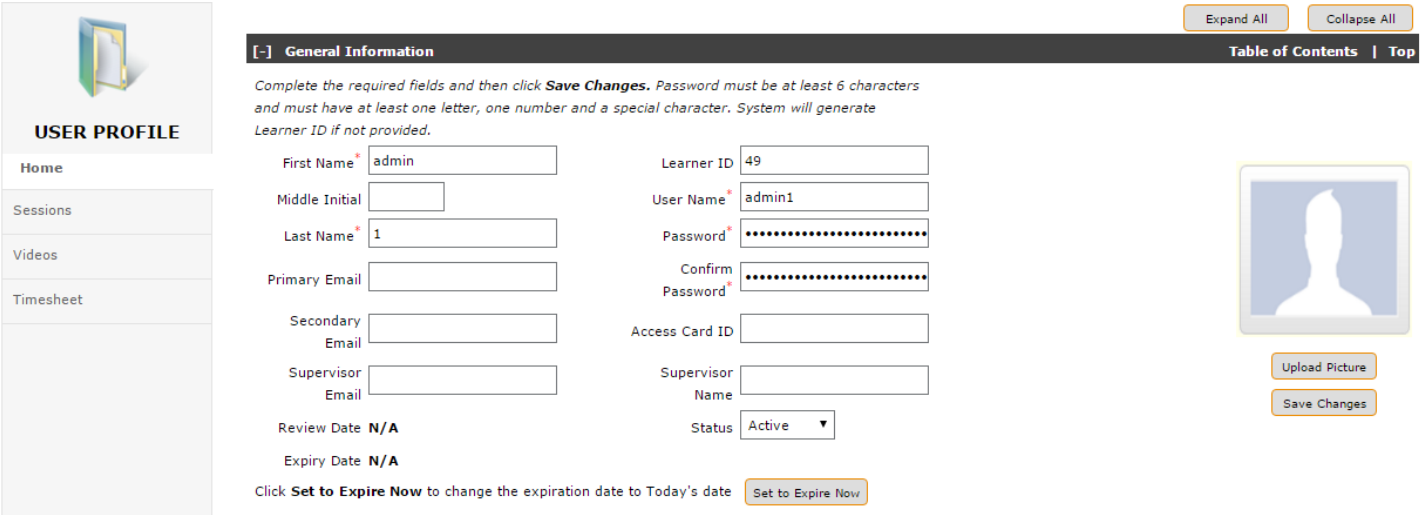
After selecting an existing user from the grid via the **Explore** tab (by clicking on their name), the Landing Page appears with the **User Profile** tool belt; the **Tool Belt** has tabs for **Sessions** to which the user is assigned and **Videos** to be viewed by the user. **Timesheets** are also available from the **Toolbelt.**

The **General Information**, **Permission**, **Authentication Type** and **Access** details entered when the user was first created appear once more, though more details may be needed depending on the user task access.

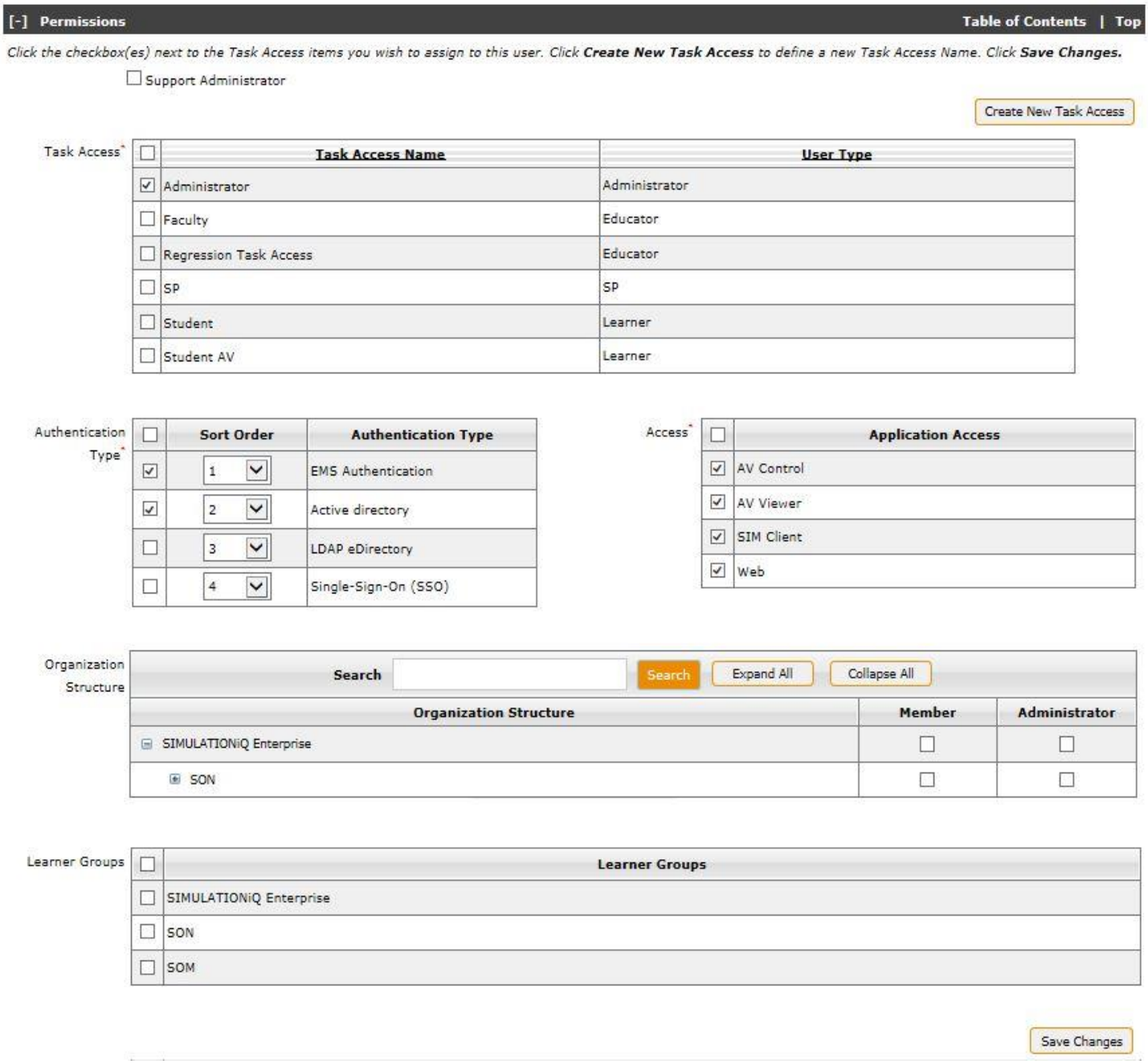
The following remaining sections of the activity page appear based on user type access:

Field	Description
Administrator	General Information Permissions Contact Information Availability Additional Information Personal History Medical History Habits Experience Notes
Educator	General Information Permissions Contact Information Availability Additional Information Notes
SP	General Information Permissions Contact Information Availability Additional Information Personal History Medical History Habits Experience Notes
Learner	General Information Permissions Contact Information Additional Information Notes

A typical **General Information** section appears as shown below, containing the same information entered previously when the user was created.



If any changes are made to the **General Information** section of the **User Profile** page, click **Save Changes**. You can now proceed to the **Permission**s section, as shown below.

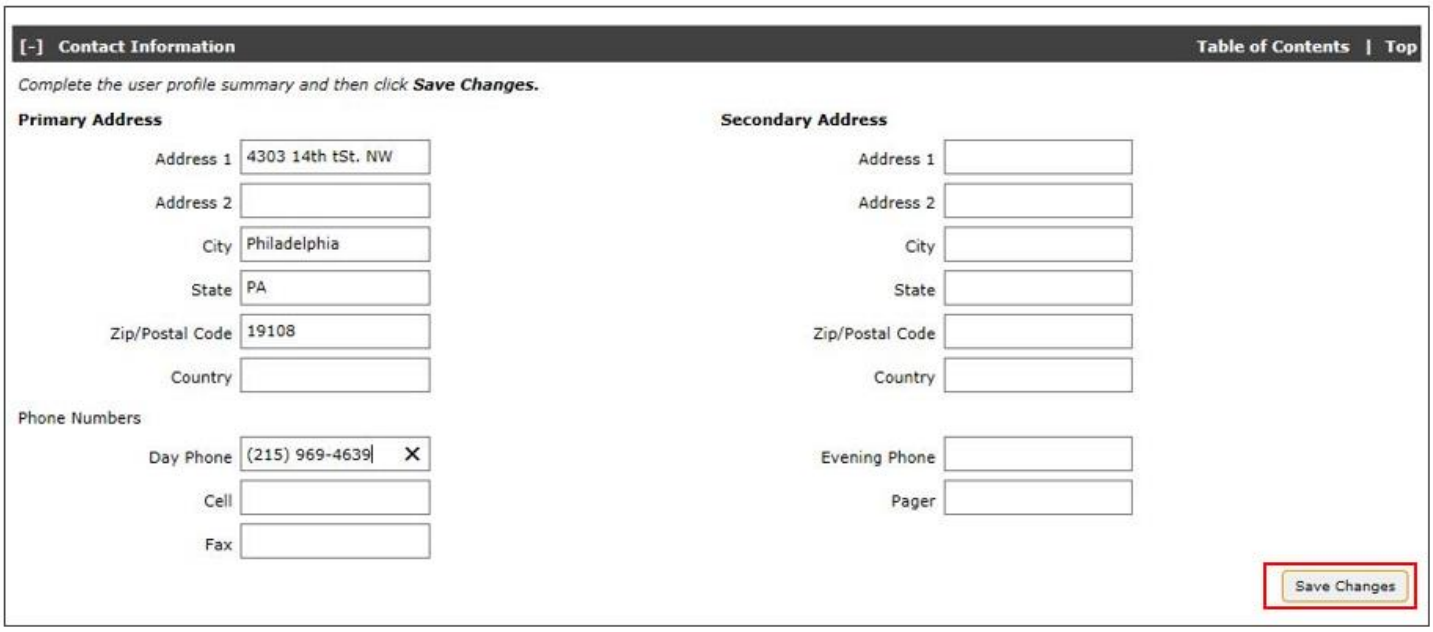


The **Task Access**, **Authentication Type** and **Access** appear as before when the user profile was created. If the user belongs to an **Organization Structure** as a member or administrator, that information is noted in the grid. If the user also belongs to a **Learner Group**, that information is also noted in the grid.

Note: To take a user out of a learner group or organizational unit, navigate to **Organizational Structure** in **Settings**. From the Landing Page accessible from the **Explore** view, click the checkbox next to the group or

unit from which you want to remove the user and select **Edit**. More information on this can be found in the Organization Structure topic.

After completing the **Permissions** section of the page (if not completed previously when the user was first created), click **Save Changes**. You can now proceed to the **Contact Information** section, as shown below.



Complete the following fields:

<u>Contact Information</u>

Primary Address

Field	Description
Address 1	Enter the first line of the user's primary address.
Address 2	Enter the first line of the user's primary address (if applicable).
City	Enter the primary city where the user resides.
State	Enter the primary state where the user resides.
Zip/Postal Code	Enter the primary zip or postal code where the user resides.
Country	Enter the primary country where the user resides.

Secondary Address

Field	Description
Address 1	Enter the first line of the user's secondary address (if applicable).
Address 2	Enter the first line of the user's secondary address (if applicable).
City	Enter a secondary city where the user resides (if applicable).
State	Enter a secondary state where the user resides (if applicable).
Zip/Postal Code	Enter the secondary zip or postal code where the user resides (if applicable).
Country	Enter the secondary country where the user resides (if applicable).

Phone Numbers

Field	Description
Day Phone	Enter the user's daytime phone number.
Cell	Enter the user's cell phone number.
Fax	Enter the user's fax number.
Evening Phone	Enter the user's evening phone number.
Pager	Enter the user's pager number

After completing the **Contact Information** section of the page, click **Save Changes**. You can now proceed to the **Availability** section, as shown below**:**

[-] Availability Table of Contents | Top

Select availability and then click Save Changes.

Availability

	Weekday	Availability
☐	Monday	Morning
☐	Monday	Afternoon
☐	Tuesday	Morning
☐	Tuesday	Afternoon
☐	Wednesday	Morning
☐	Wednesday	Afternoon
☐	Thursday	Morning
☐	Thursday	Afternoon
☐	Friday	Morning
☐	Friday	Afternoon
☐	Saturday	Morning
☐	Saturday	Afternoon
☐	Sunday	Morning
☐	Sunday	Afternoon

Save Changes

Click the checkboxes as applicable to assign when the user will be available for a session and click **Save Changes** when finished.

After completing the **Availability** section of the page, you can now proceed to the **Additional Information** section, as shown below**:**

[-] Additional Information Table of Contents | Top

*Add additional information and then click **Save Changes.***

Date of Birth MM/DD/YYYY
Gender ○ Male ○ Female
Height
Weight
Marital Status
Employer
Occupation
MCAT Score 0.00

Availability
Clinical Center Experience ○ Yes ◉ No
Primary Language
Ethnicity/race
Secondary Language
No. of Children 0
Graduation Year
Undergraduate GPA 0.00

Save Changes

Complete the following fields:

Field	Description
Date of Birth	Enter the user's date of birth.
Gender	Select the user's gender by choosing the applicable radio button.
Height	Enter the user's height.
Weight	Enter the user's weight.
Marital Status	Select the user's marital status from the drop-down list.
Employer	Enter the name of the user's employer, if applicable.
Occupation	Enter the user's occupation.
MCAT Score	Enter the Medical College Admission Test score, if applicable.
Availability	Enter the user availability.
Clinical Center Experience	Select whether or not the user has clinical center experience by clicking the applicable radio button.
Primary Language	Enter the user's primary language.
Ethnicity/Race	Select White, African American, American Indian, Asian, Hisapnic or Other from the drop-down list.
Secondary Language	Enter the user's secondary language, if applicable.
No. of Children	Enter the number of the user's children, if applicable.
Graduation Year	Enter the anticipated graduation year of the user, if applicable.
Undergraduate GPA	Enter the undergraduate grade point average, if applicable.

After completing the **Additional Information** section of the page, click **Save Changes** to retain your selections. You can now proceed to the **Personal History** section, as shown below (for a user entered into SIMULATIONiQ Enterprise as an SP wishing to enroll in an SP program)**:**

[-] Personal History Table of Contents | Top

Complete the following personal history questions and then click Save Changes.

In General, how do you currently feel about the medical :

Have you worked as an SP previously?

Why are you interested in the SP program?

What special skills/abilities/experiences do you bring to the role of SP?

List distinguishing physical features such as scars, birthmarks, tattoos and specify where they are located:

List current medical conditions.

List any physical limitations you may have:

List any surgeries you have had and the year you had them:

It would be helpful to know if you have had a close friend or relative with any significant health problem or disease. Please specify:

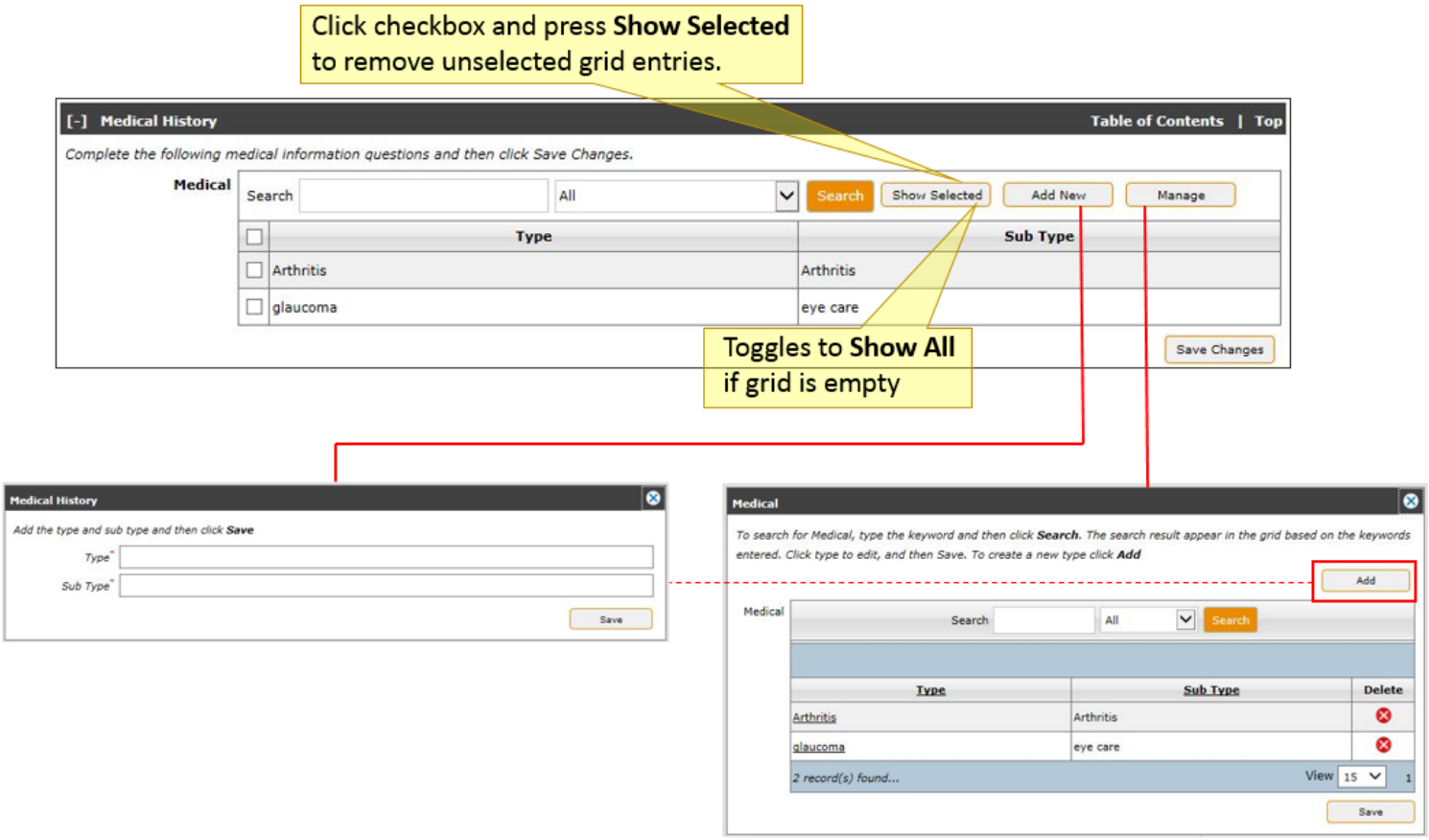
Briefly describe your best experience with medical profession:

Briefly describe your worst experience with the medical profession:

In General, how do you currently feel about the medical profession:

Save Changes

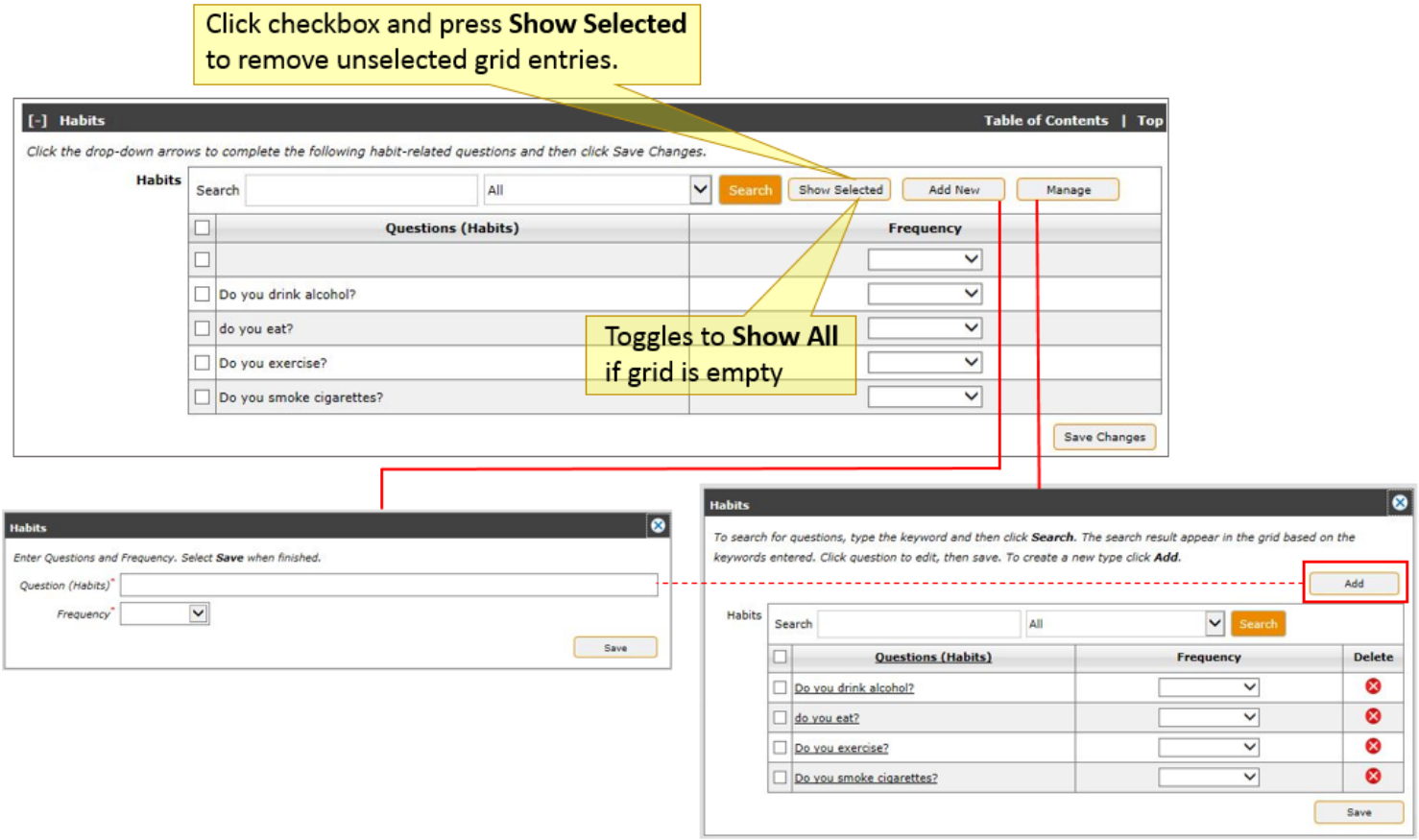
Answer the questions to complete the **Personal History** section of the page; click **Save Changes** when finished. You can now proceed to the **Medical History** section, as shown below.



The following functionality is available:

- **Show All/ Show Selected** – Click **Show All** to display all medical history selections. Click the checkbox next to the grid selection and click **Show Selected** to show only that selection in the grid.
- **Add New** – Click **Add New** to create a new Medical History selection, including type and subtype. Click **Save** when finished.
- **Manage** – Click **Manage** to access a Medical History selection. Search for selection using keywords by **Type**, **Sub Type** or **All**. You can also delete existing selections or add a new selection. Click **Save** when finished.

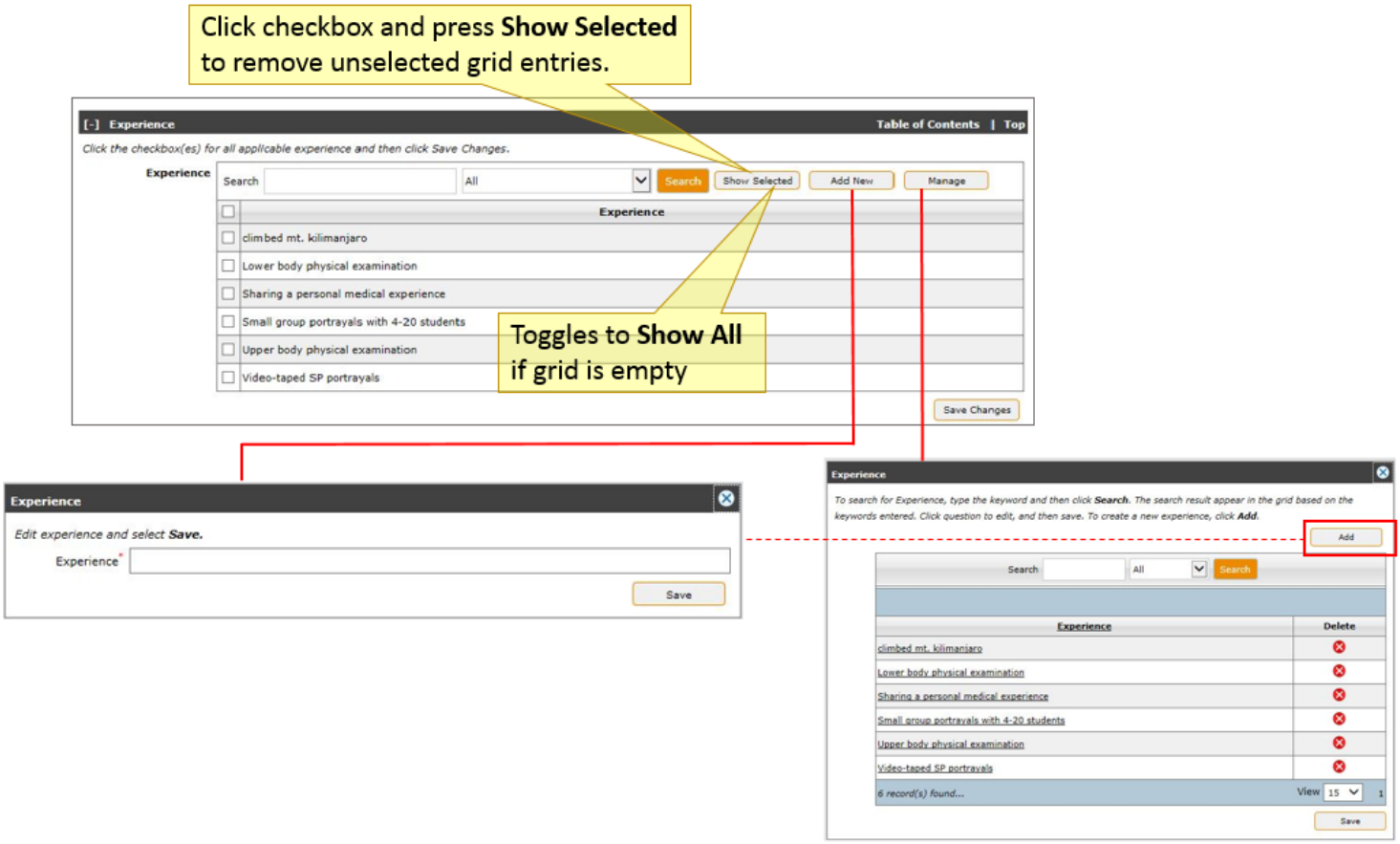
After completing the **Medical History** section of the page, click **Save Changes**. You can now proceed to the **Habits** section, as shown below.



The following functionality is available:

- **Show All/ Show Selected** – Click **Show All** to display all habit selections. Click the checkbox next to the grid selection and click **Show Selected** to show only that selection in the grid.
- **Add New** – Click **Add New** to create a new habit selection, including related Question and Frequency (default selections are **No**, **Occasionally**, **Regularly**, or **Routinely**). Click **Save** when finished.
- **Manage** – Click **Manage** to access a habit selection. Search for selection using keywords by **Type**, **Sub Type** or **All**. You can also delete existing selections or add a new selection; you can also change frequency selections for other habit questions. Click **Save** when finished.

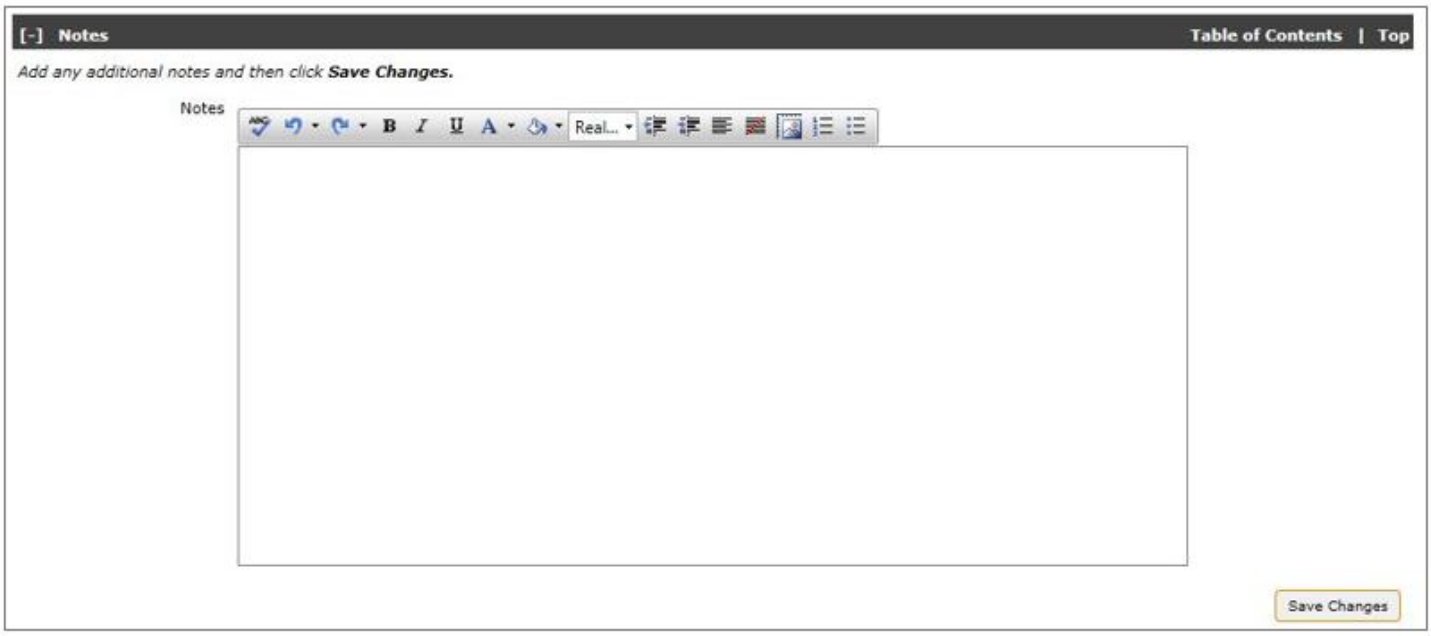
After completing the **Habits** section of the page, click **Save Changes**. You can now proceed to the **Experience** section, as shown below.



The following functionality is available:

- **Show All/ Show Selected** – Click **Show All** to display all experience selections. Click the checkbox next to the grid selection and click **Show Selected** to show only that selection in the grid.
- **Add New** – Click **Add New** to create a new experience selection. Click **Save** when finished.
- **Manage** – Click **Manage** to access a experience selection. Search for selection using keywords by **Experience** or **All**. You can also delete existing experience selections or add a new selection. Click **Save** when finished.

After completing the **Experience** section of the page, click **Save Changes**. You can now proceed to the **Notes** section, as shown below**:**



Enter any notes for this user profile and click **Save Changes**. After entering all user profile details, click **Save All Changes**.

User Type

Click **User Type** from the **Explore** tab; the following grid appears (click **Add New** to add a new user from the **User Profile** page)

Search | All | Search

Print | Email | Change Status | Delete | Change Permissions | Send Message | Linked Case / Scenario | Set Expiration | Export

	Name	User Name	Email	Grad Yr	Task Access	Type	Status	Delete
	1, admin	admin1			Administrator	Administrator	Active	
	1, Educator	Ed1			Faculty	Educator	Active	
	1, Learner	Learner1			Student	Learner	Active	
	1, SP	SP1			SP	SP	Active	
	10, Educator	Ed10			Faculty	Educator	Active	
	10, Learner	Learner10			Student	Learner	Active	
	10, SP	SP10			SP	SP	Active	
	2, admin	admin2			Administrator	Administrator	Active	
	2, Educator	Ed2			Faculty	Educator	Active	
	2, Learner	Learner2			Student	Learner	Active	
	2, SP	SP2			SP	SP	Active	

User Task Access

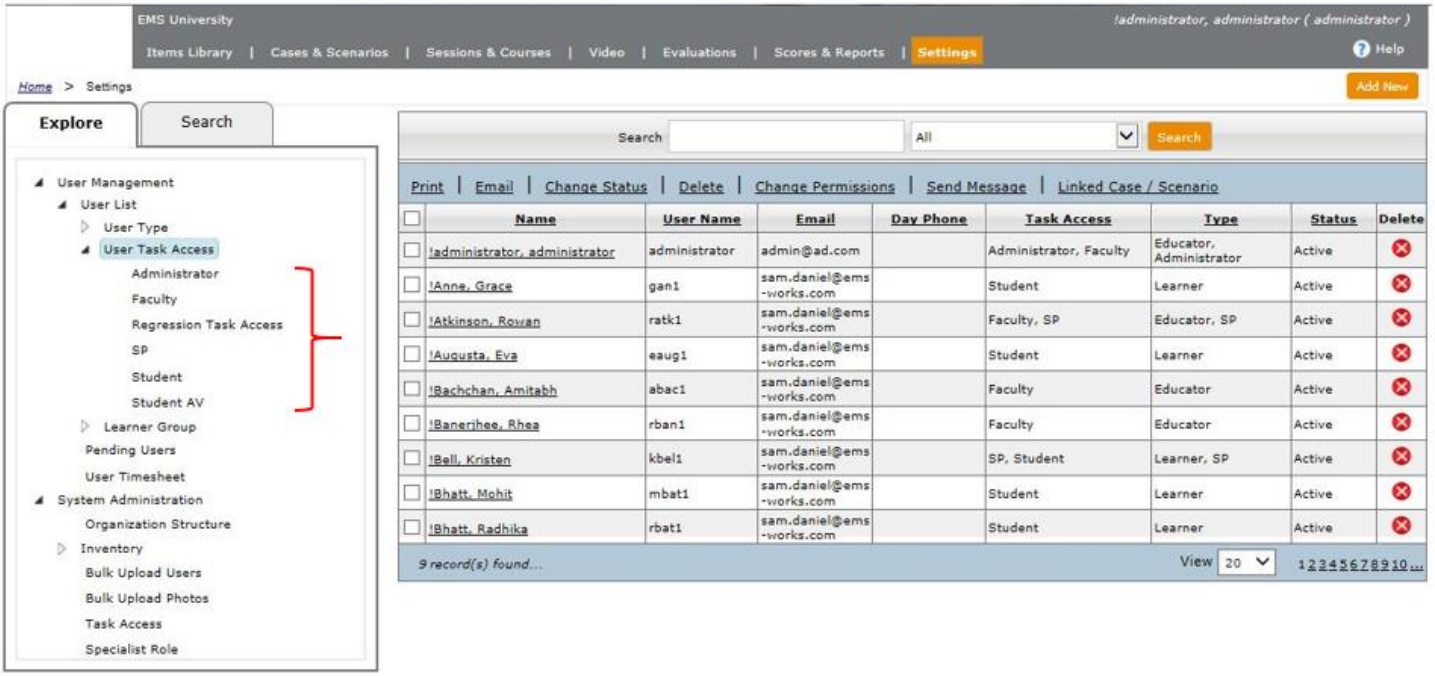
Click **User Task Access** from the **Explore** tab; the following grid appears:

Search | All | Search

Print | Email | Change Status | Delete | Change Permissions | Send Message | Linked Case / Scenario | Set Expiration | Export

	Name	User Name	Email	Grad Yr	Task Access	Type	Status	Delete
	1, admin	admin1			Administrator	Administrator	Active	
	1, Educator	Ed1			Faculty	Educator	Active	
	1, Learner	Learner1			Student	Learner	Active	
	1, SP	SP1			SP	SP	Active	
	10, Educator	Ed10			Faculty	Educator	Active	
	10, Learner	Learner10			Student	Learner	Active	
	10, SP	SP10			SP	SP	Active	
	2, admin	admin2			Administrator	Administrator	Active	
	2, Educator	Ed2			Faculty	Educator	Active	
	2, Learner	Learner2			Student	Learner	Active	
	2, SP	SP2			SP	SP	Active	

The **User Task Access** groups appear from the **Explore** tab in a sample format shown as follows (all groups, including the default selections and any created for your institution, appear in the list highlighted by the red bracket).



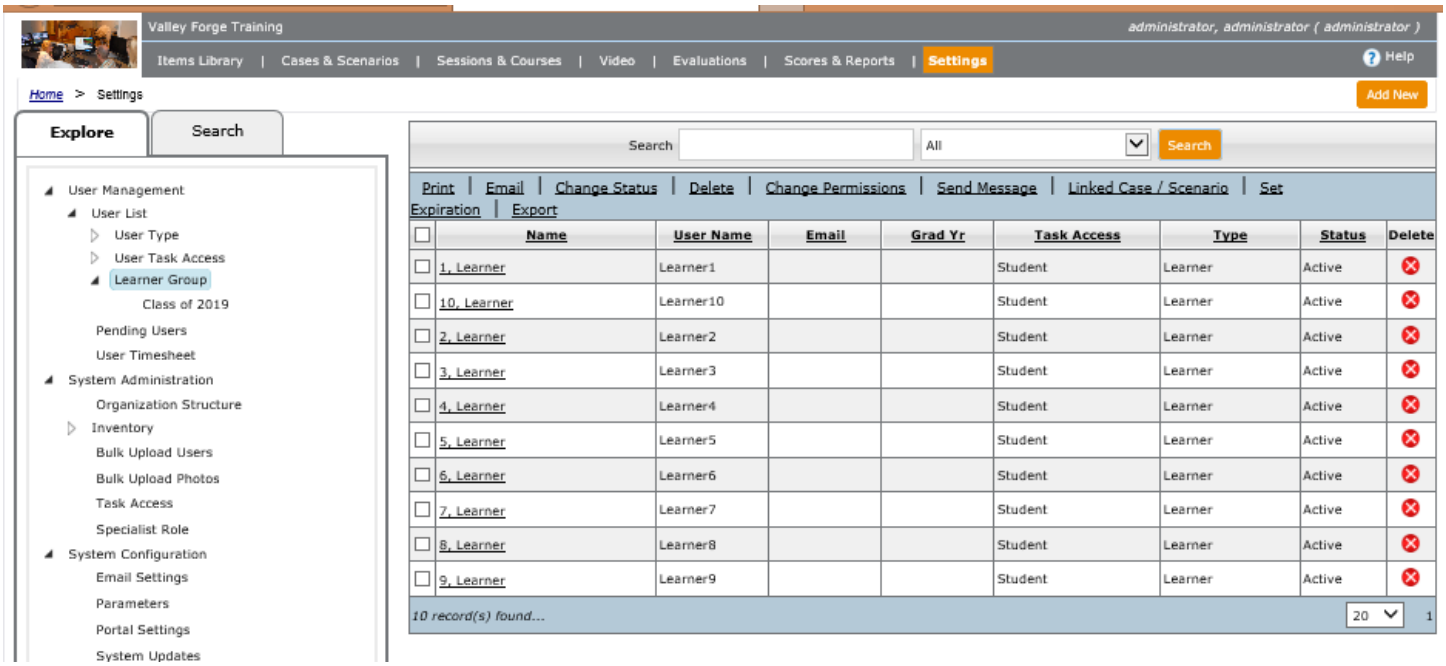
Click on each of the bracketed selections to populate the grid with the users in the selected **User Task Access** group.

The following **Task Access** levels exist within SIMULATIONiQ Enterprise (not including other task groups that may have been added by the user):

Name	Description
Administrator	This enables a user to access all functionality.
Faculty	This enables a user to access all functionality except Settings.
SP	This enables a user to access only the Session Calendar/User Availability module.
Student	This enables a user to access the Scores & Reports modules, as well as videos or checklists that may be assigned to that student.

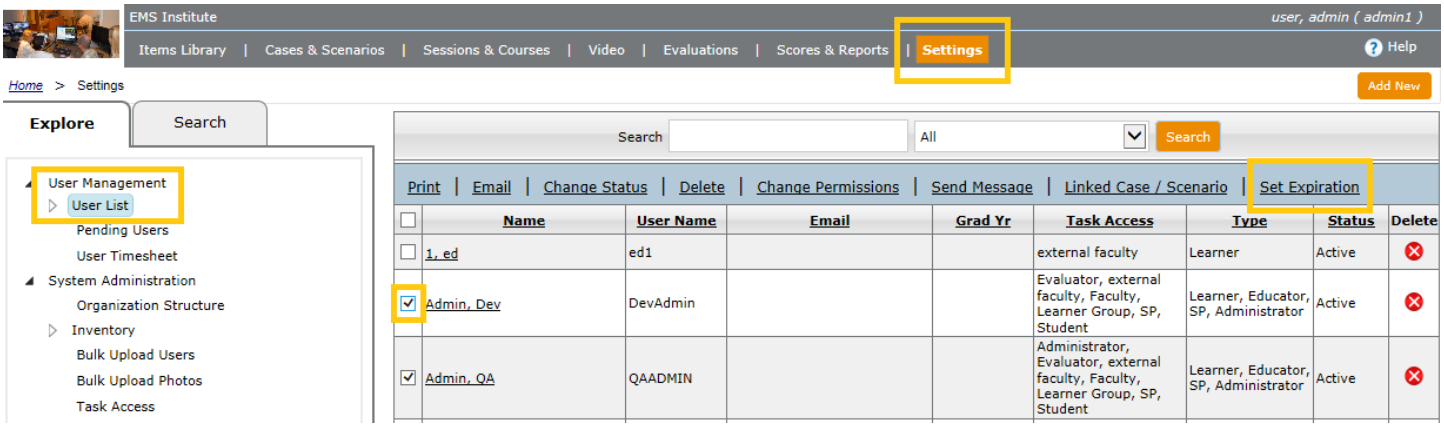
Learner Group

Click **Learner Group** from the **Explore** tab; the following grid appears:

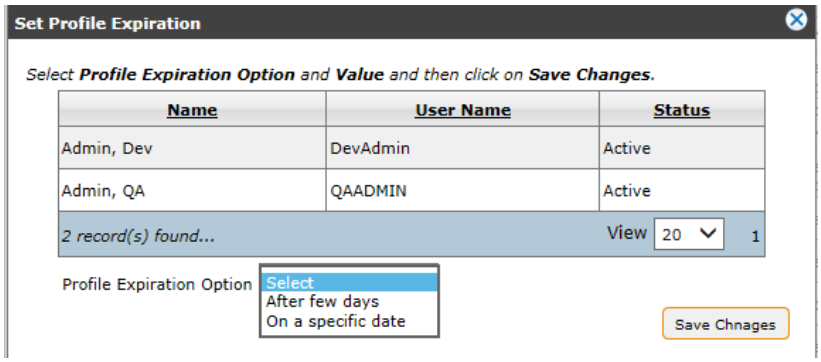


Click on the learner group name to populate the grid with the users in the selected Learner group.

Profile Update



1. **Settings > User List** > click one or more profiles or select all > click **Set Expiration** link.

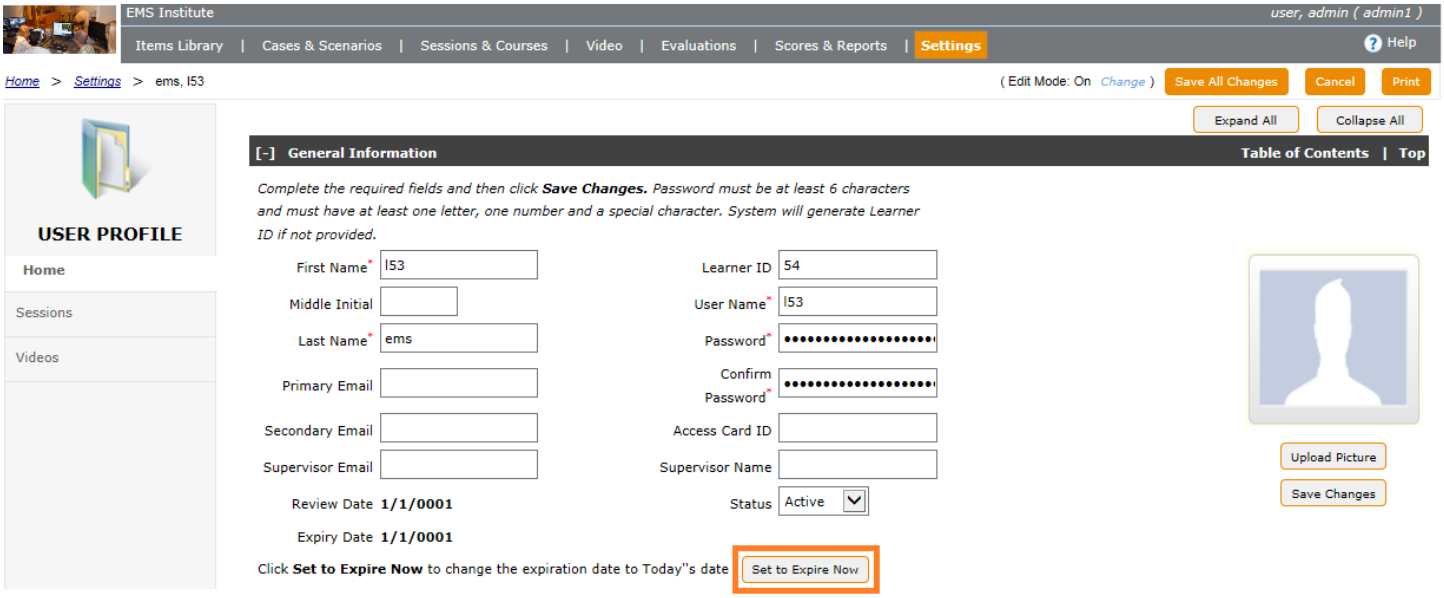


2. In the **Profile Expiration Option** field, select:

- After a few days: a defined number of days (30, 60, or 90 days)
- On a specific date: (i.e., January 31)

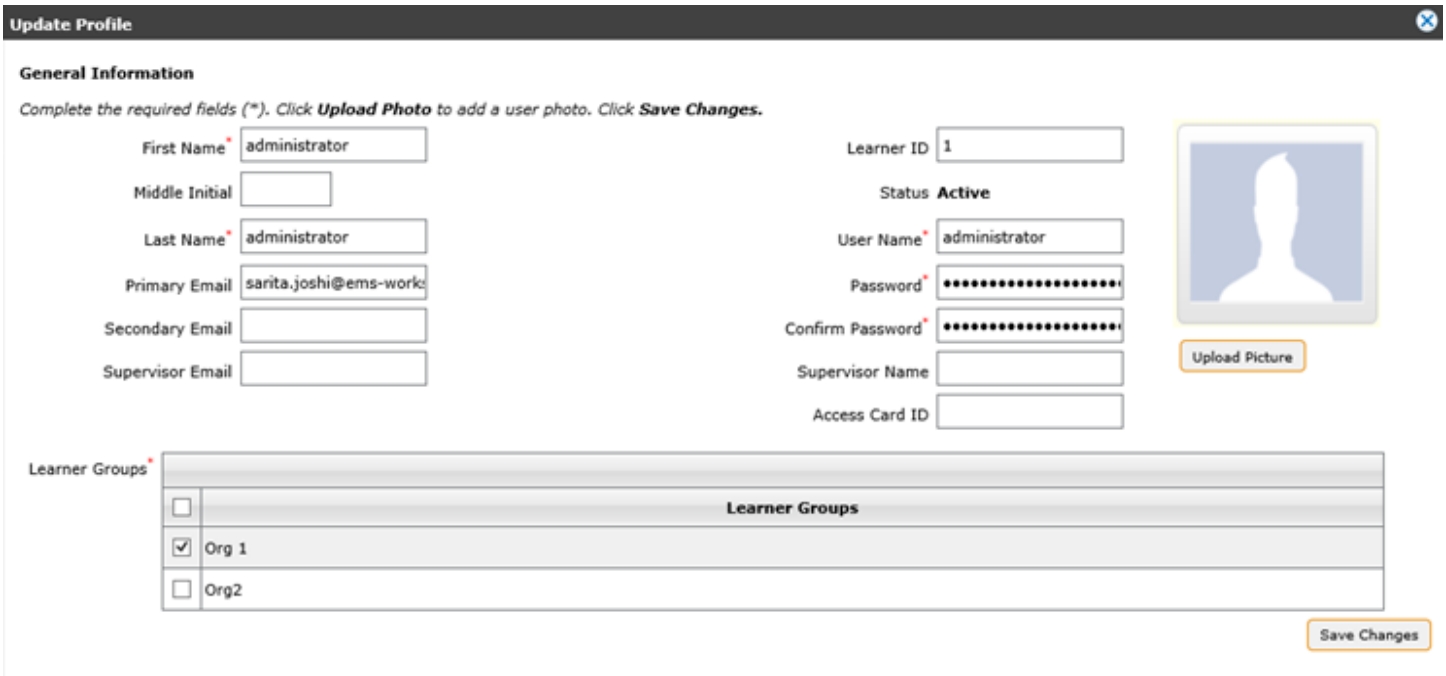
<u>Individual Profiles</u>

Each user profile has a **Set to Expire Now** button to prompt the selected user to review and update his or her user profile immediately.



1. **Settings > User List > Individual Profile.**
2. Click **Set to Expire Now** to prompt the user to review and update his or her user profile immediately.

Update Profile (web and Kiosk)



Profile updates apply when logging in to the web or Kiosk application—users must update their user profile in whichever application they try to log in to first (not both).

During the first login attempt after the user profile expiration date, the **Update Profile** screen appears automatically.

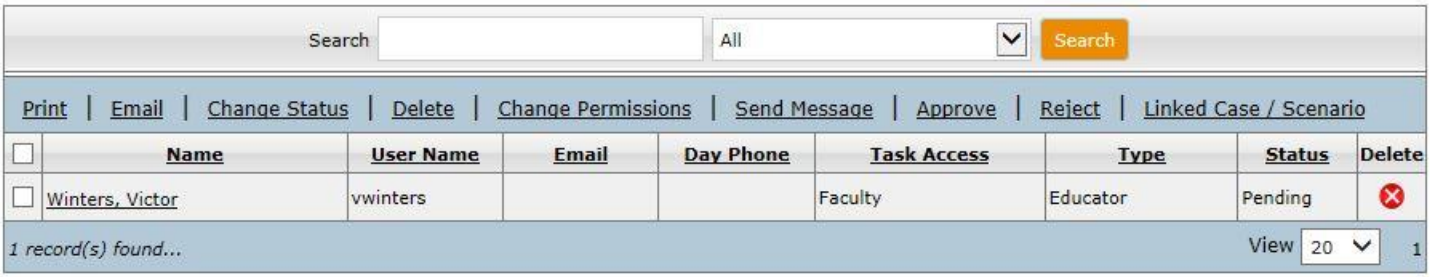
1. Reviews and update all required (*) fields and then click **Save Changes**. ***Note***: Password must be at least 6 characters and must have at least one letter, one number, and a special character.

Then the system resets the user profile expiration date based on the Profile Expiration Date.

Pending Users

Click **Pending Users** from the **Explore** tab; this applies to individuals who have applied to the standardized patient program but have not yet been approved, students pending approval for training, and other task categories. Note that this list does not contain information for users who have been approved and are either considered "active" or "retired."

The following grid appears:



This grid includes the following information:

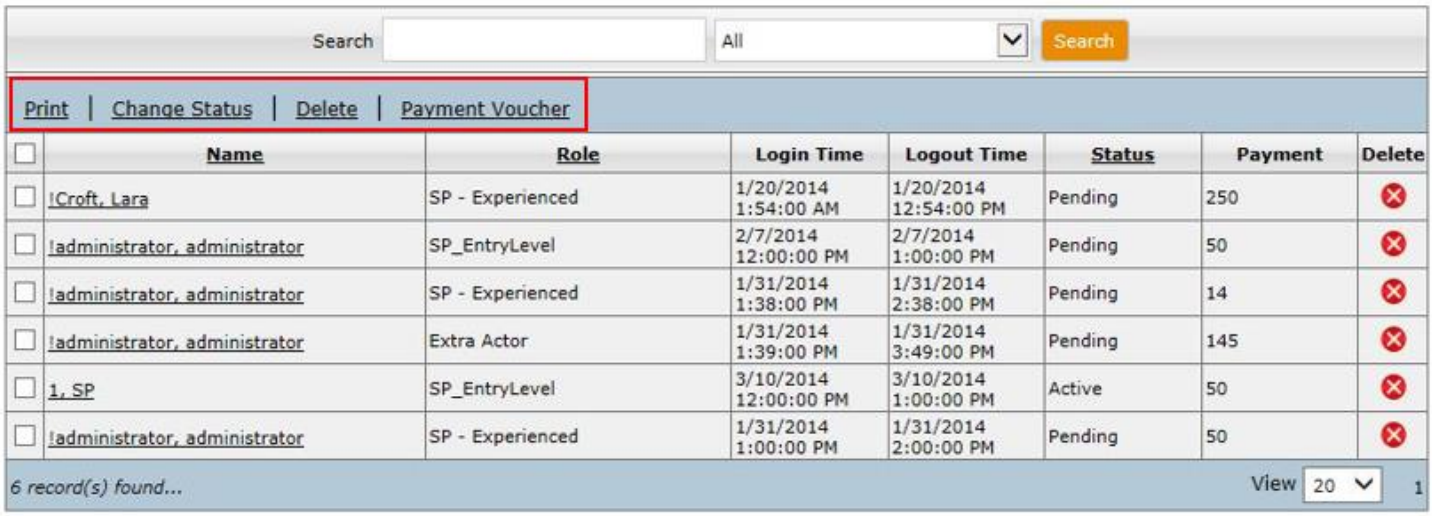
Field	Description
Name	This is the full name of the user.
User Name	This is the user name required to log onto SIMULATIONiQ Enterprise.
Email	This is the Email address of the user.
Day Phone	This is the user's daytime phone number.
Task Access	This is the task access defined for the user.
Type	This is the type of user; default types enable particular system activity based on module access (e.g., only administrator types can access Settings)
Status	This is the user status (should appear as Pending for this grid).
Delete	Click the checkbox next to the name of the user and click this button to delete the user.

To approve a user, click the checkbox and click the **Approve** link to execute this grid function. Rejecting a user removes that user from the grid, though the rejected user can be located by using **Search** tab functionality (a user with approval access will be notified of pending users from the dashboard immediately after logging onto the application).

Once the user is approved, this changes the status of the user to **Active**.

User Timesheet

Click **User Timesheet** from the **Explore** tab; the following grid appears:

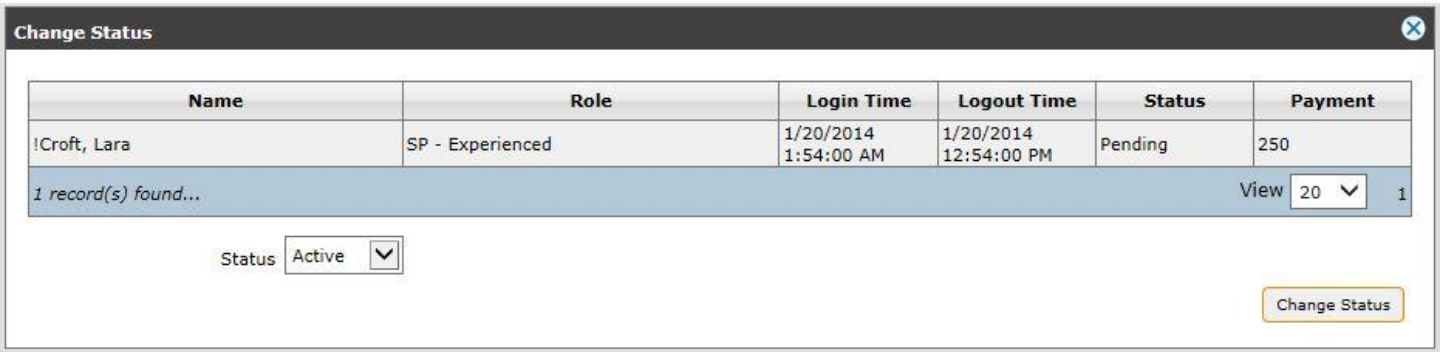


Name	Role	Login Time	Logout Time	Status	Payment	Delete
!Croft, Lara	SP - Experienced	1/20/2014 1:54:00 AM	1/20/2014 12:54:00 PM	Pending	250	
!administrator, administrator	SP_EntryLevel	2/7/2014 12:00:00 PM	2/7/2014 1:00:00 PM	Pending	50	
!administrator, administrator	SP - Experienced	1/31/2014 1:38:00 PM	1/31/2014 2:38:00 PM	Pending	14	
!administrator, administrator	Extra Actor	1/31/2014 1:39:00 PM	1/31/2014 3:49:00 PM	Pending	145	
1, SP	SP_EntryLevel	3/10/2014 12:00:00 PM	3/10/2014 1:00:00 PM	Active	50	
!administrator, administrator	SP - Experienced	1/31/2014 1:00:00 PM	1/31/2014 2:00:00 PM	Pending	50	

The following functionality is available from the menu bar (highlighted above):

- **Print** – Click the checkbox next to the user name and click this selection to generate a .pdf or select Save as Excel.

- **Change Status** - Click the checkbox next to the user name and click this selection; the following appears:



Name	Role	Login Time	Logout Time	Status	Payment
!Croft, Lara	SP - Experienced	1/20/2014 1:54:00 AM	1/20/2014 12:54:00 PM	Pending	250

Select a new Status from the drop-down list (**Active**, **Pending**, or **Rejected**) and click **Change Status**.

- **Delete** – Click the checkbox next to the user name and click this selection to delete the user.

- **Payment Voucher** - Click the checkbox next to the user name and click this selection to generate a payment voucher; a sample follows:

Payment Voucher

!Croft, Lara

EMS Education Management Solutions

Gravity

Date	Role	Duration (hh:mm)	Rate/Hour	Total
01/20/2014	SP - Experienced	11:00	30.00	250.00
			Total Rate	250.00

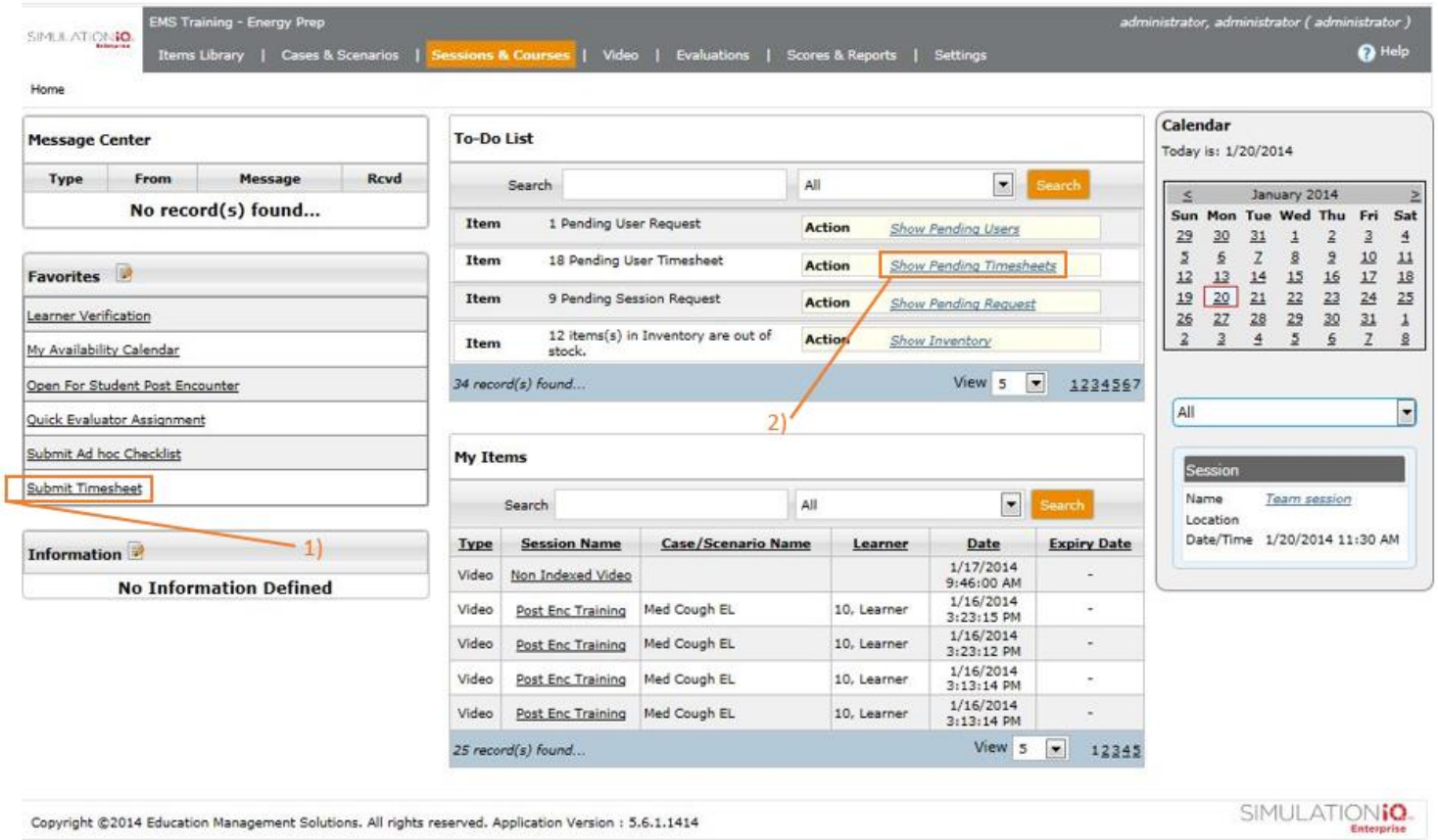
Program Name _____

Signature _____ **Signature** _____

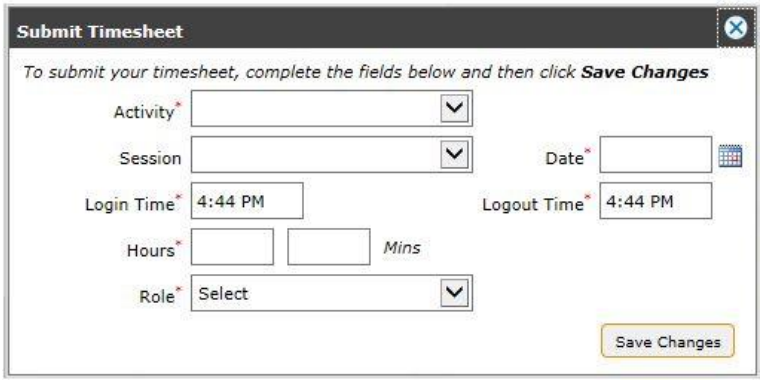
Approved By _____ **Received By** _____

7/17/2014 11:38 AM *Copyright ©2014 Education Management Solutions* *Page 1 of 1*

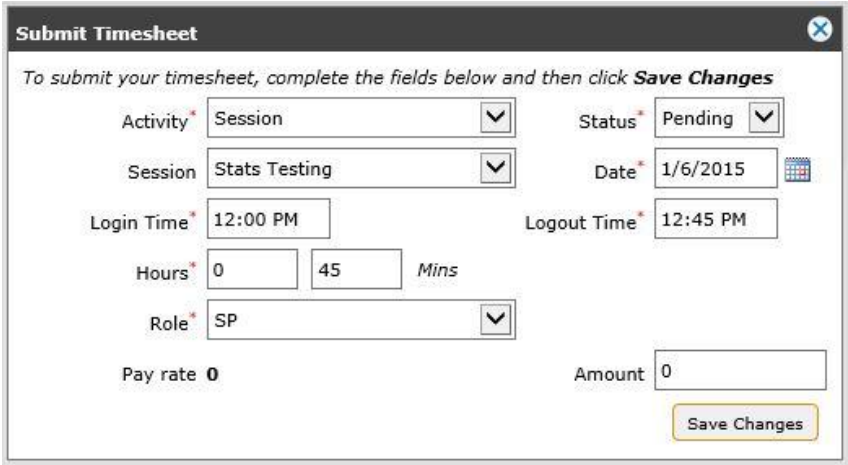
Your institution may allow a standardized patient to submit a timesheet from the dashboard (1, in the following graphic). After that, they are reviewed by an educator or Administrator from the dashboard and either approved or returned to the SP for more information (2, in the following graphic).



An SP completes the following dialog after clicking **Submit Timesheet** from the dashboard:



Once the timesheet is submitted, it appears on the User Timesheet grid for an administrator that is accessed from the **Explore** tab; clicking the Submit Timesheet link calls up the following dialog:



Enter the following information:

Field	Description
Activity*	Select **Session** or **Other Activity** from the drop-down list.
Session	Select the Session from the drop-down list.
Status*	Select a status as follows: **Active** – The timesheet can be viewed by the SP. **Pending** – The SP's timesheet will be reviewed by the administrator. **Rejected** – The SP's timesheet is rejected.
Date*	Select the date by clicking the icon or entering the date at the text field.
Login Time*	Enter the login time (please specify AM or PM).
Logout Time*	Enter the logout time (please specify AM or PM).
Hours*	Enter the hours and minutes to be included in the timesheet.
Role*	Select the SP from the drop-down list.
Pay Rate	The Pay Rate appears based on the **Amount** value approved by the Administrator.
Amount	Enter a pay rate for the SP at this field.
*-denotes required field	

Click **Save Changes** to retain your timesheet details.

System Administration

Click the **System Administration** link to call up the **Settings** Landing Page (the same page one that appears when clicking on the **User Management**, **System Configuration**, or **AV Configuration** selections from the **Explore** tab).

Organization Structure

A facility and its divisions are known as the Organization Structure. Divisions can be made within the hierarchy structure. These divisions are referred to as “units.”

Organization Units are a way to divide your parent Organization Unit into sub-units and distribute your users into them. Think of an organization unit as an organization, and its members have membership within that group. When creating the Organization Units, users can be designated as a member, and if Learner Group is checked, there will also be a Learner Group affiliate, primarily for learners to be members of that group. Regardless of whether a user is a member or a learner, they are all members of that organization unit. Putting learners into that unit’s Learner Group has advantages outlined below.

Advantages to Using Organization Units

The following are advantages of using Organization Units:

- Reports can be run by unit name to see room and equipment usage
- Learner Groups can be designated within each Organization Unit, and then learners can be added as members to it.
- Permissions to view and/or download videos can be applied to an entire Organization unit.

Note: For new customers, your SIMULATIONiQ Enterprise application is delivered with one parent Organizational Unit within the structure, which is listed at the top level of the Organization Structure. If you are an Arcadia customer, your Branches will migrate over into units into your new SIMULATIONiQ Enterprise system.

Types of Members

Each division will have its members. Any organization unit can have three different types of members:

- Members
- Learner Group (if a Learner Group is defined for that unit).
- Administrator(s) – this is just to label who the head of the unit is, it doesn’t have any other unique usage. Administrators are members of the group.

Once the Organizational Structure is defined, learner groups and users can be associated with one or more levels within the structure.

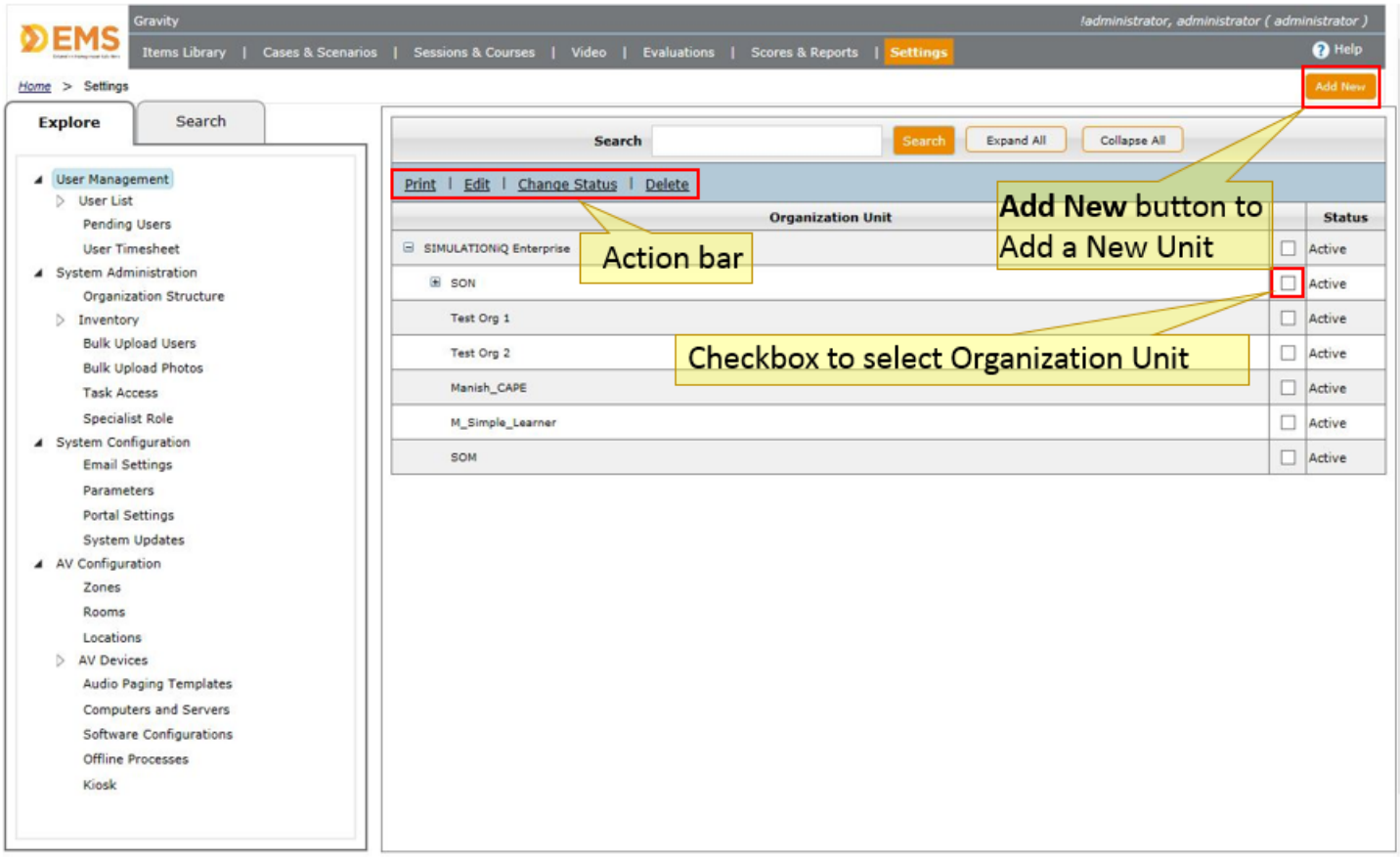
Important Information About Members and Groups

The following is important information about members and groups:

- Learners can be a member of the Members Group or a member of the Learner Group; but we recommend if using a Learner Group within a unit, to put your learners into it.
- A user can be a member of more than one group.
- A Learner can be a member of more than one learner group.

Note: An SP User type *can<u>not</u>* be a member of any Organization structure.

<u>How to Create an Organization Unit</u>

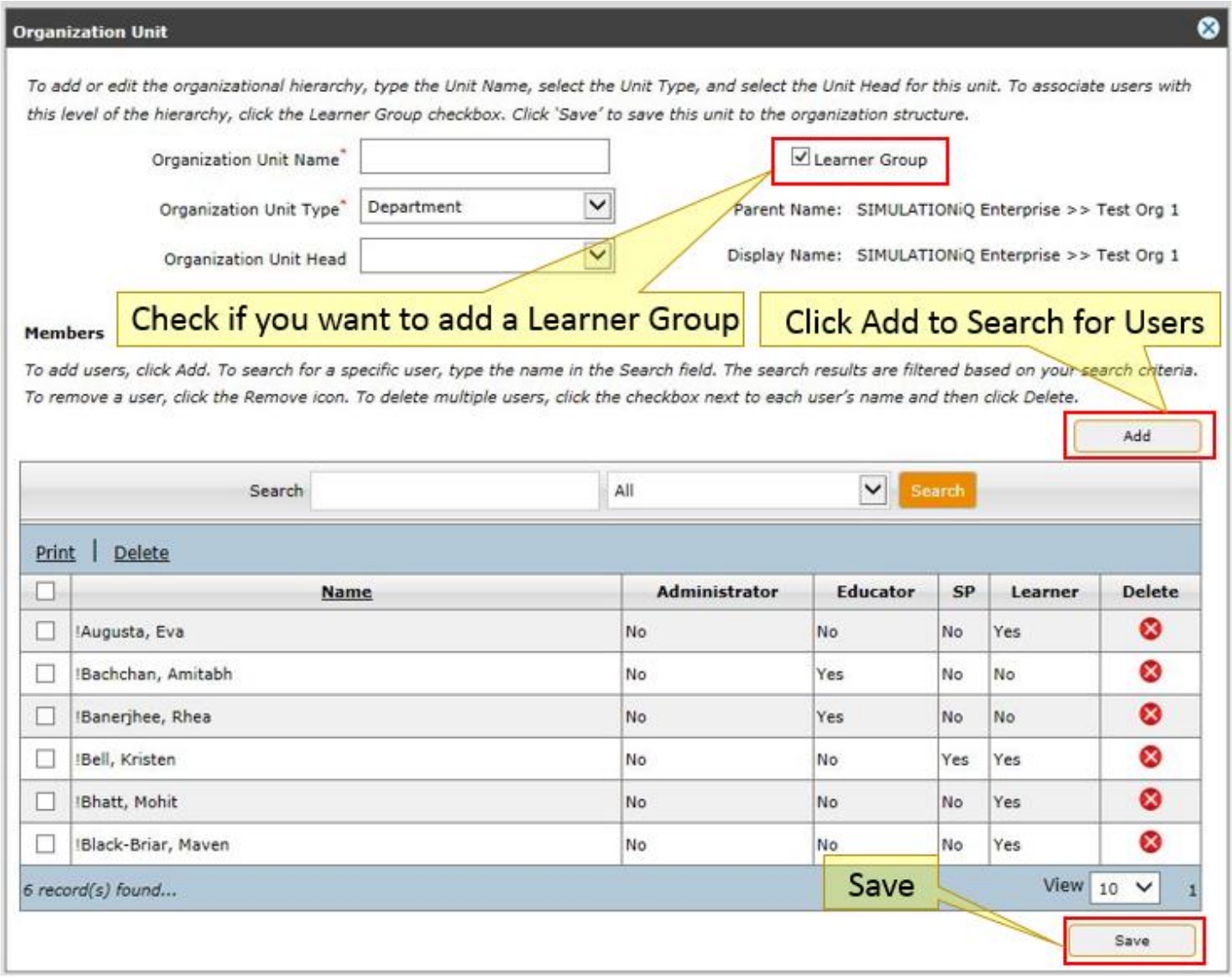


1. In the Settings Task, click on Organization Structure under System Administration.

   The list of Organization Units will be listed. Your parent organization will be at the top of the list and if there hasn't been any other units added, it will be the only one in the list.

2. Click the checkbox to the right of the Organization Unit that will be the parent to the unit you are creating. *Be sure that the unit is the only checkbox checked.*

3. Click the **Add New** button in the upper right corner of the list. The Organization Unit window will display:



4. In the Organization Unit Name* field indicate the name of the unit you are creating. (This is a mandatory field as indicated by the red "*" asterisk.)

5. Select a Unit Type* from the dropdown menu that best describes the type of division you are creating. Your choices are:

   - **Department – using this will enable you to define the department that requests sessions to be scheduled and scheduling sessions.**
   - Employer
   - Hospital
   - Network
   - Institute

- Professional Group
- Sub Professional Group
- Branch
- General Group

6. **Organization Unit Head** – This is optional. The user selected here will be in the Members group of this unit.

About Learner Groups

If this Organization Unit will also have a Learner Group, check the Learner Group checkbox to create a Learner Group (see "Advantages to Using Leaner Groups" for more information).

Advantages to Using Learner Groups

The following are advantages to using Learner Groups:

- Filters your search for learners by a selected Learner Group.
- A Learner Group is necessary if you will be allowing learners to self-register for sessions.
- Permissions to view and/or download videos can be applied to an entire Learner Group.

How to Create a Learner Group

1. Select an Organization Unit by checking the checkbox to the right of its name. If you are creating an Organization Unit and making a Learner Group in the same step, click the **Add New** button.

2. If your Organization Unit has already been created, click **Edit** in the light blue menu bar.

3. Check the **Learner Group** checkbox to make a learner group for your organization unit.

4. **Parent Name**: this is the Parent organization unit that this unit will be a division of. This was the unit that you checked.

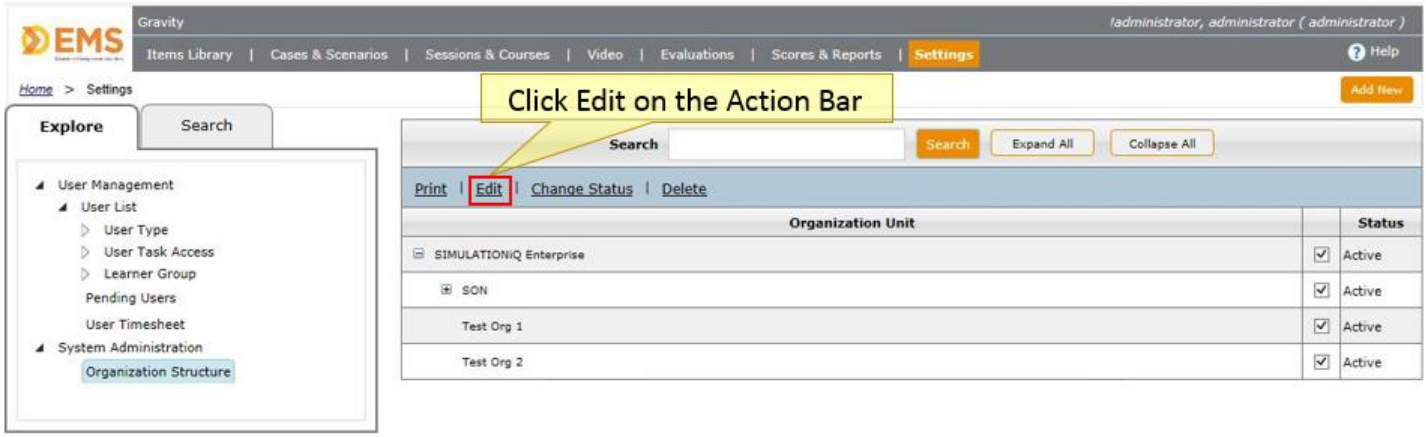
5. **Display Name**: This is the way the Parent organization name and its sub-units are displayed when choosing the Organization Unit in Scores & Reports and when searching for learners on a Session activity page.

The Learner Group will not be listed under **Explore tab > User Management > User List > Learner Group** until refreshing your web page to view the updates. **Refresh your page by pressing the F5 key.**

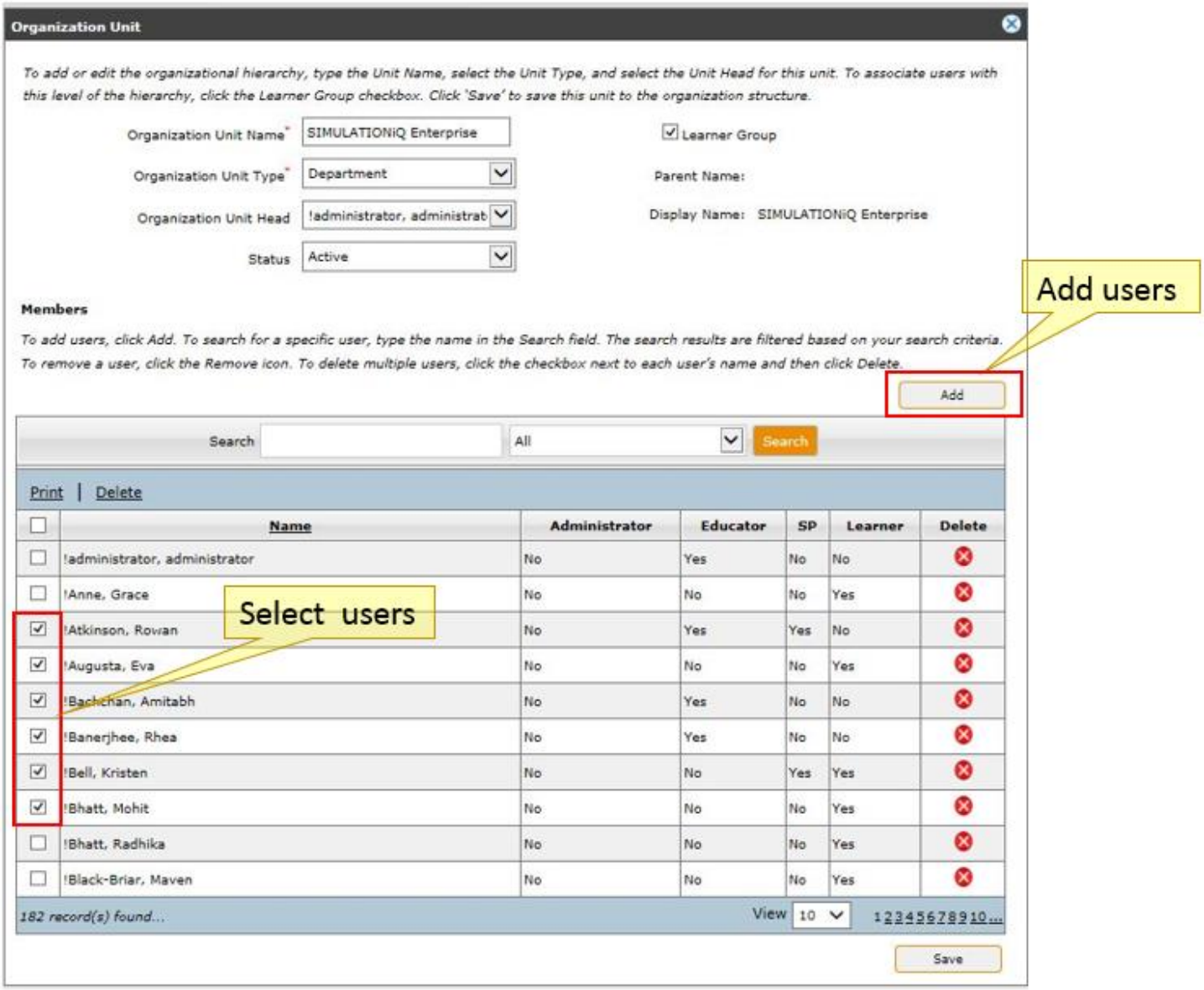
Adding Users to a Group

To add multiple members to an Organization Unit:

1. In Settings > Organization Unit, click the checkbox to the right of the unit listed to select it. Click the **Edit** hyperlink on the **Action** bar (at the top of the columns). This will open the Organization Unit window.

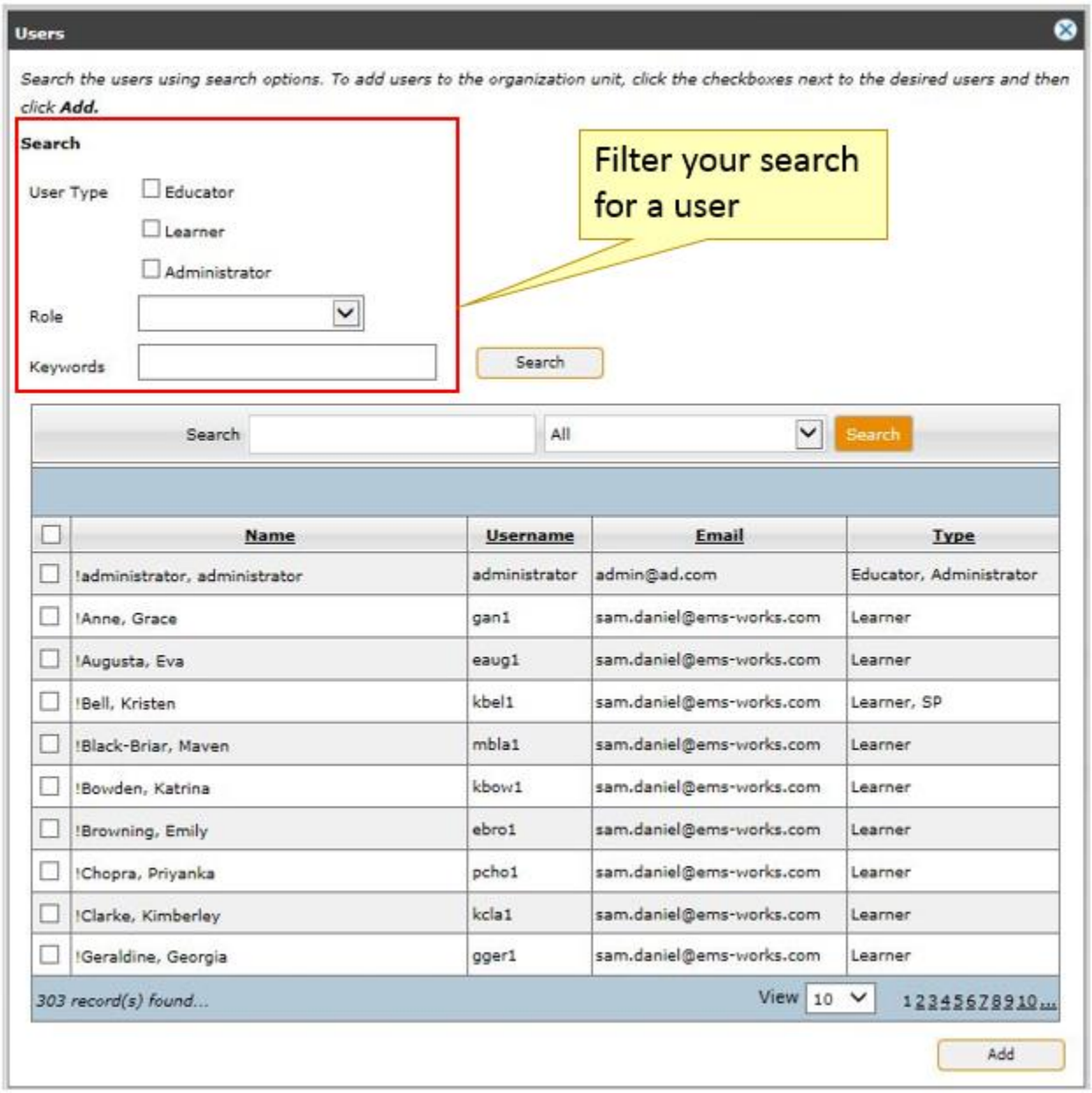


The Organization Unit window



1. Select the users by checking the checkbox next to their name.
2. Click **Save**.
3. To add a user to the group, click the **Add** button. The Users window will display.

<u>The Users Window</u>



Filter Your User Search

To filter your user search within your Organization Structure:

1. Check the checkboxes to filter your search by **user type** or use the drop down menu to filter your search by **user role.**

2. Type a keyword (for example: part of a user name) in the **Keyword** field and click **Search.**

3. Type the name in the Search field and then click **Search.**

4. The search results are filtered based on your search criteria. Select the user by checking the checkbox to the left of their name and then click **Save**.

Add a User to a Unit or Learner Group (Profile Page)

To add a user to a unit or learner group through their profile page:

1. Go to **Settings > Explore tab > User Management > User List** and locate user from the Search Result list on the right.

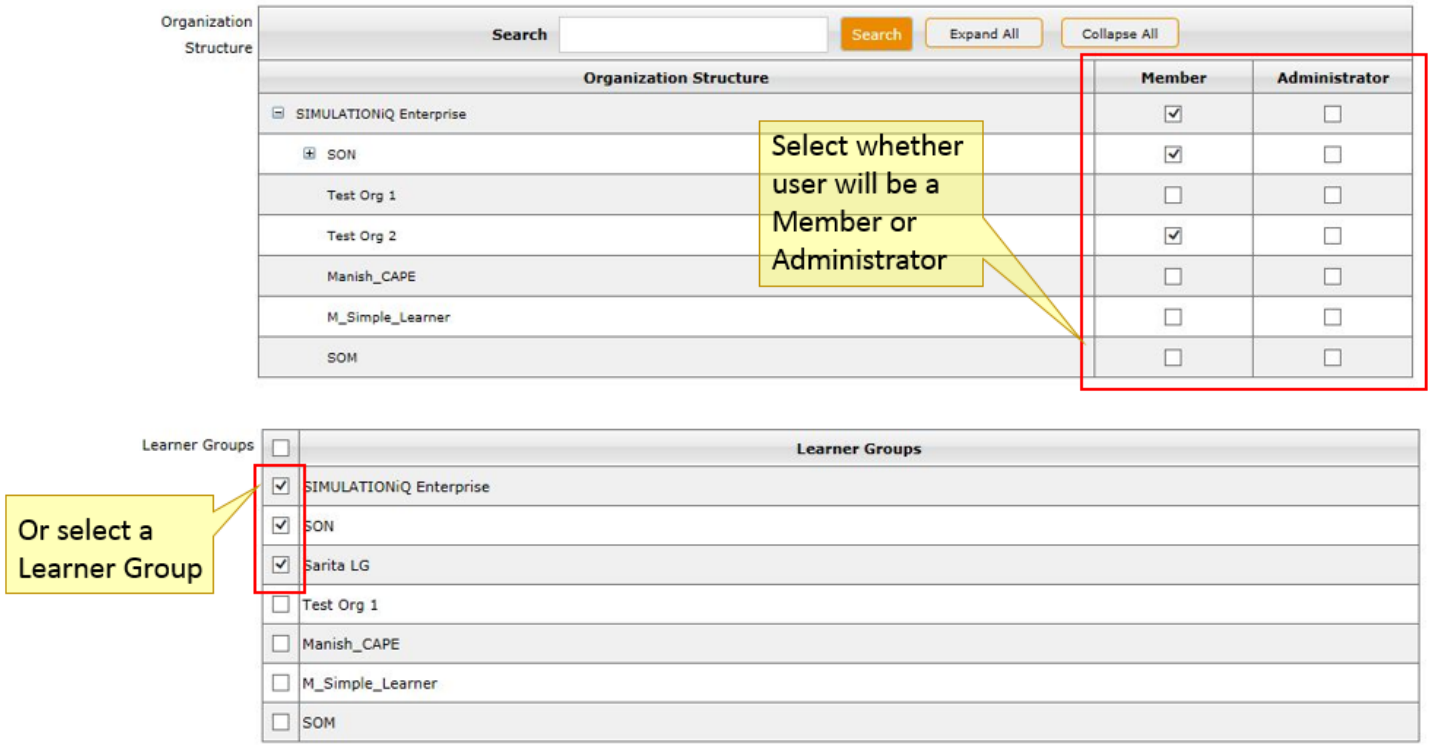
2. Click the user's **name** hyperlink in the Name column. This will open their **Profile Page**.

3. Go to the **Permissions** section of the page. The **Organization Units** will be listed in the Organization Structure grid.

4. Check the checkboxes in the **Member** or the **Administrator** column of any of the appropriate unit.

5. **Save Changes**.

User's Profile Page



Verify User is in a Learner Group from the Explore Tab

View users by going to **Settings > Explore tab > User Management > User List > Learner Group**. The learners should be listed there. They may not be listed if you until your web page is refreshed to view the updates. **Refresh your page by pressing the F5 key.**

Verify User is in a Learner Group from their Profile page

1. Find your user's name by clicking the **Settings > Explore tab > User Management > User List > User Type > Learner**. The list will populate to the Results pane to the right.

2. Click on the user name in the list which will open that user's Profile Page.

3. In the Permissions section of the page, in the Learner Groups grid, verify the checkbox is checked next to the Learner Group you want the user to be a member.

4. **Save Changes.**

To Remove a User from a Unit

To remove a User from a Unit:

1. Go to **Settings** > Explore tab to **Organization Structure**.

2. Select the Organization Unit of the member you which to remove by checking the checkbox to the right of its name.

3. In the Search Results Page to the right, check the checkbox to the right of the listing.

4. Click on **Edit** in the Action bar (at the top of the column).

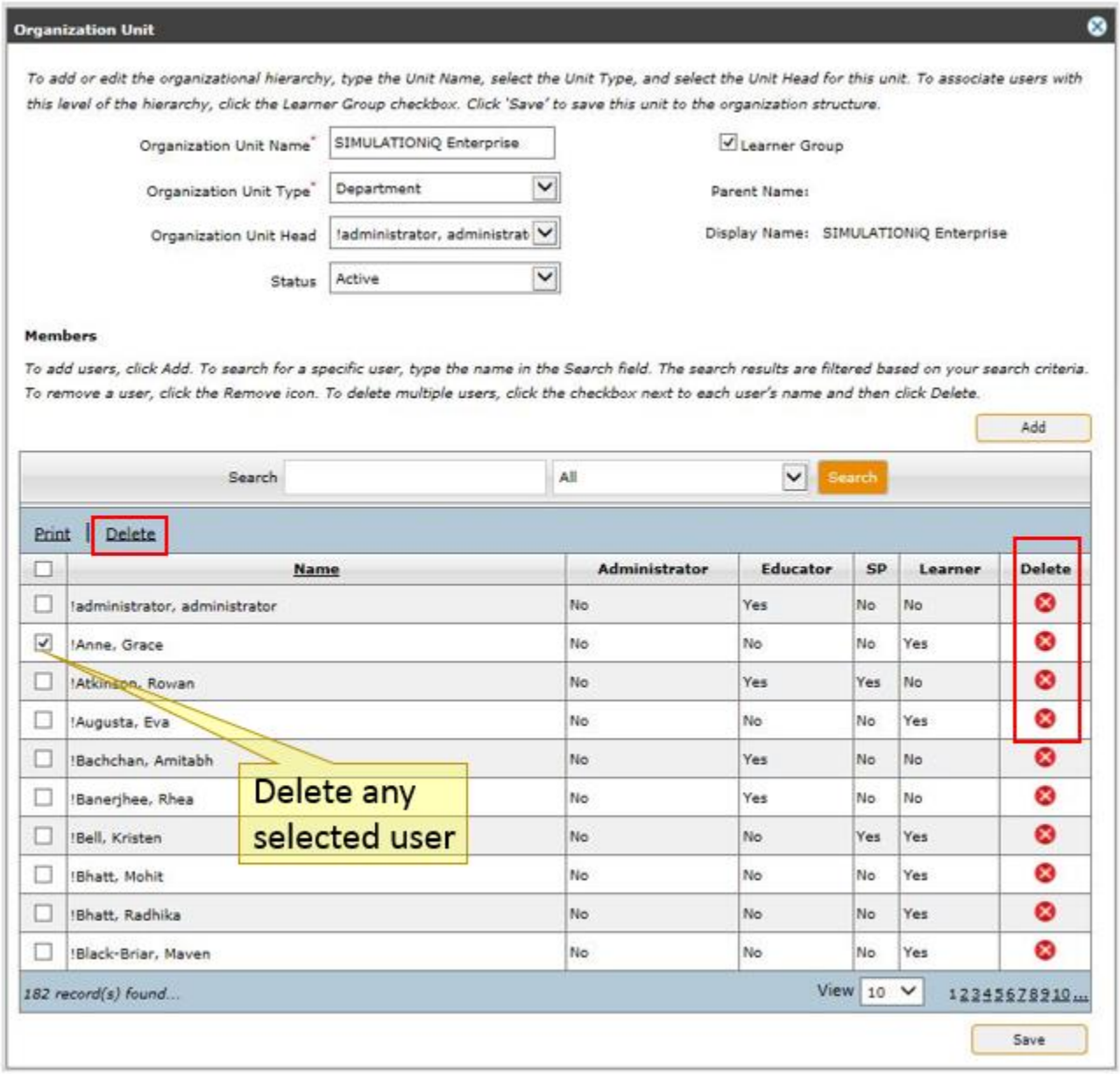
5. The members list will display.

6. Locate the user you want to remove. Select the checkbox next to their name and then either click the delete X icon in the delete column or choose **Delete** in the light blue action bar above the column.

7. To delete multiple users, click the checkbox next to each user's name and then click **Delete**.

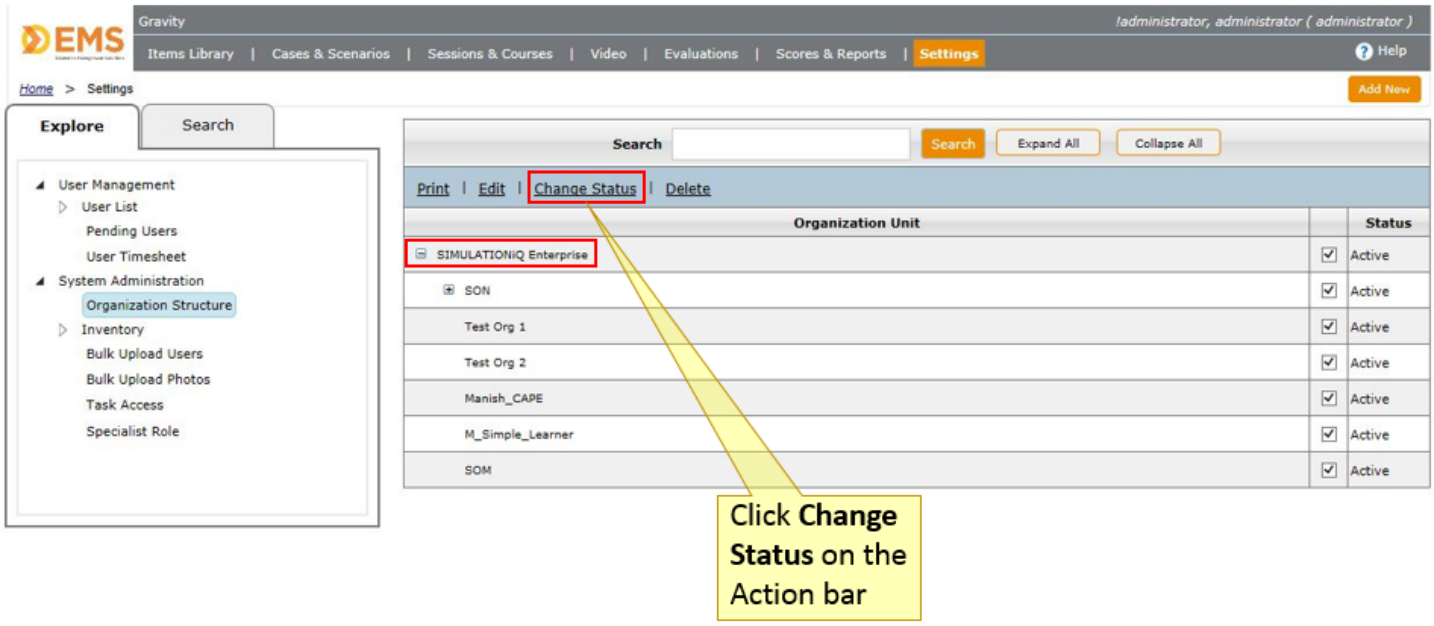
8. **Save**.

IMPORTANT: Deleting a user from a unit does NOT remove them from the system. It only removes them as a member of that unit.



Change Status from Active to Retired

1. In Settings > Organization Unit, click the checkbox to the right of the unit listed to select it. Click the **Change Status** hyperlink on the Action bar (at the top of the columns). This will open the Change Status window.



2. Select whether the Unit will be **Active** or **Retired.**

3. Click the **Change Status** button to save the change.

User Profile Updates

Overview

Administrators can set a mandatory date to prompt users to review and update their user profiles before logging in to the web or Kiosk applications. ***Note***: The profile update does not apply when logging in to the AV applications.

The profile expiration date can be set to:

- a defined number of days (30, 60, or 90 days)
- a specific date (i.e., January 1, 2016)
- expire immediately (for individual profiles only)

Set User Profile Expiration Date

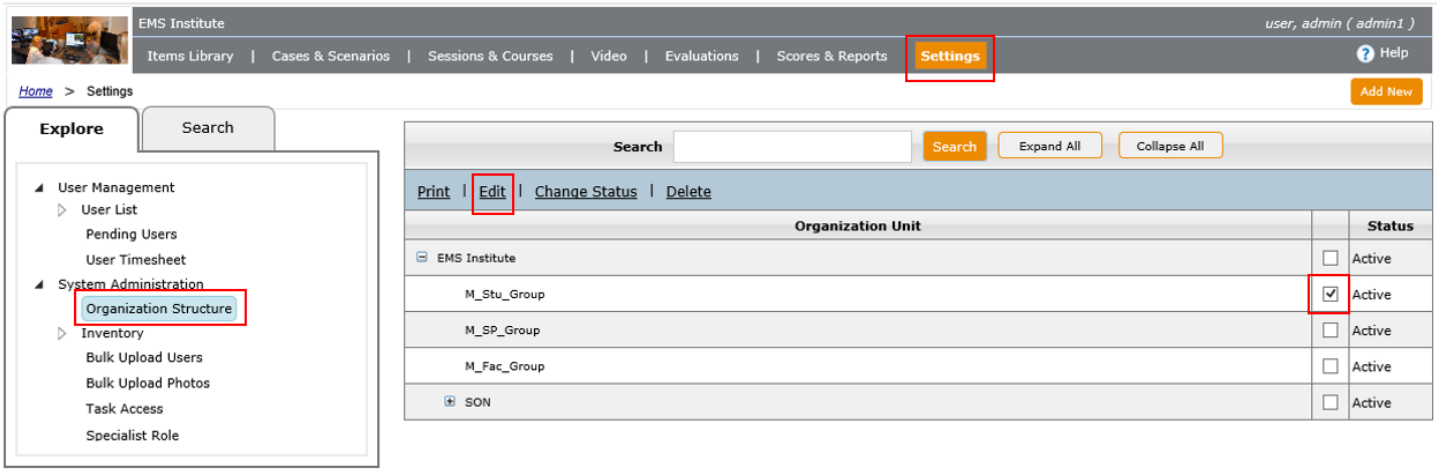
The Administrator can set the user profile updates from the following areas:

a. **Settings > Organization Structure >** click the **Institute >** click **Edit.**

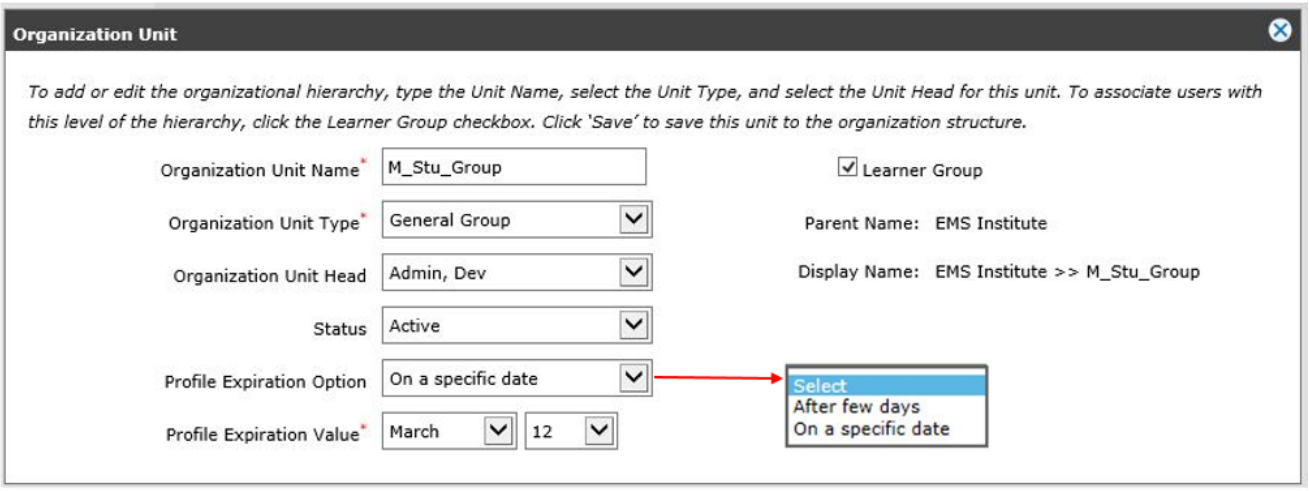
b. **Settings > User List** > click one or more profiles or select all > click **Set Expiration** link.

c. **Settings > Individual Profiles** – Each user profile has a **Set to Expire Now** button to prompt the selected user to review and update his or her user profile immediately.

Organization Structure



1. **Settings > Organization Structure >** click the **Institute >** click **Edit.**



2. In the **Profile Expiration Option** field, select:

- After a few days: a defined number of days (30, 60, or 90 days)
- On a specific date: (i.e., January 1, 2016)

Note: If a user is assigned to more than one institute, then the earliest Organization Unit profile expiration date applies.

Inventory

Click **Inventory** from the **Explore** tab; the following sample grid appears:

Add New

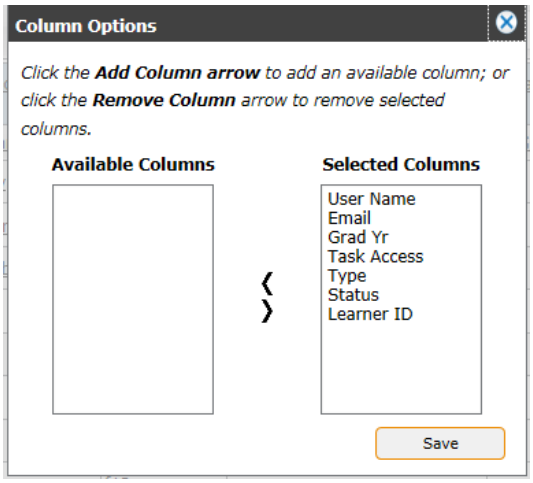
Search | All | Search

Print | Change Status | Delete | Import Equipment

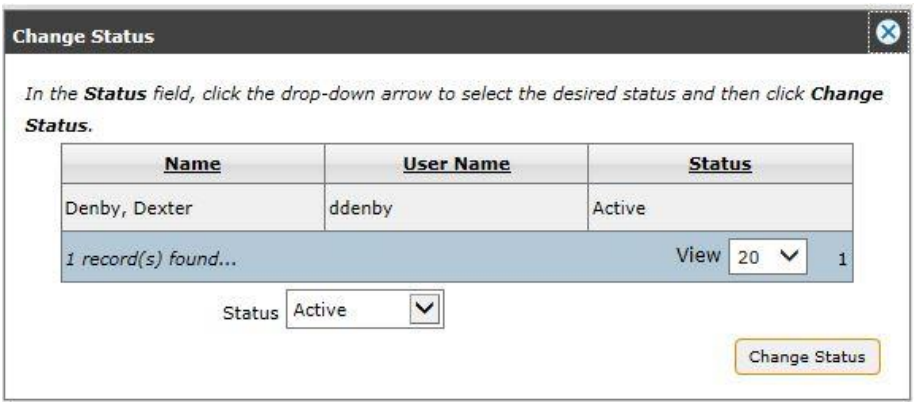
	Equipment Name	Unique ID	Type	Description	Purchase Price	Procurement Lead Time (days)	Manufacturer Website	Status	Delete	Copy
	acetaminophen		Drug		3457	10	http://www.google.com	Active		
	Coumadin		Drug		0	0		Active		
	epinephrine		Drug	desc.1	777	12	http://www.google.com	Active		
	Gauze Pads		Supply		0	0		Active		
	Neosporin		Drug	Ointment	2.5	-1		Active		
	RT 1000 ml normal saline		Supply	description	265	10	www.google.com	Active		
	RT Cytotec 200 mcg tab		Drug	description	50	21	www.google.com	Active		
	RT Ipratropium 2.25mg/ml		Drug	description	126	1	www.google.com	Active		
	RT manikin	Classic-446	Capital	description	12230	0	www.google.com	Available		
	RT manikin	SIM3G043	Capital	description	678	0	google.com	Available		
	RT manikin	SimNewborn	Capital	description	12230	0	www.google.com	Available		
	RT manikin_Copy	SIM JR	Capital	description	12230	0	www.google.com	Available		
	RT surgical masks_Copy		Supply	desc.	4562	10	http://www.google.com	Active		
	Sarita - test		Drug		12	-1		Active		
	Sarita - test		Drug		12	-1		Active		
	SIMMAN 3G	4335	Capital	desc.	4568	0	http://www.google.com	Available		
	SIMMAN 3G	3658	Capital		0	0		Available		
	surgical masks		Supply	desc.	4562	10	http://www.google.com	Active		
	test	123	Capital		0	0		Available		
	X-Ray Machine	XR-16	Capital		0	0		Available		

21 record(s) found... View 20 1 2

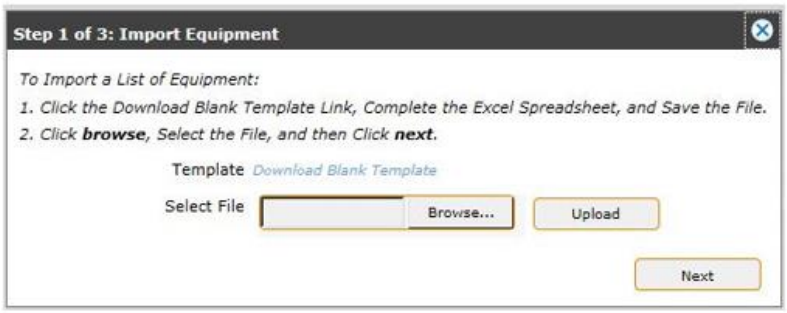
Grid Options



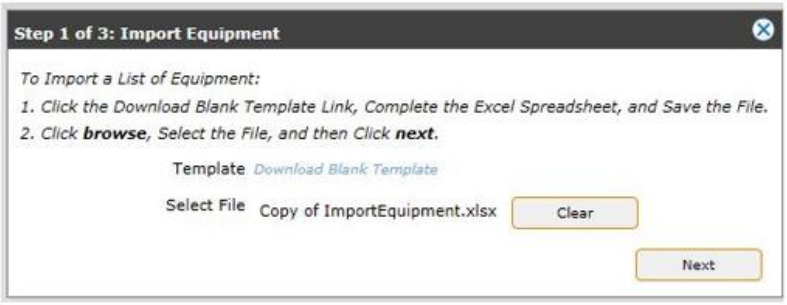
- **Column Options** – Add, remove and sort the order of the columns in grid view.



- **Print** – This prints Inventory details.
- **Change Status** Select either **Active** or **Retired** from the drop-down list. Click **Change Status** to retain your new selection.
- **Delete** – This deletes the selected user. You will receive an “Are you sure. . . “ message before deleting.
- **Import Equipment** – See below:



- **Download Blank Template**
- Add information to template
- **Browse** to locate template on network
- Press **Upload**



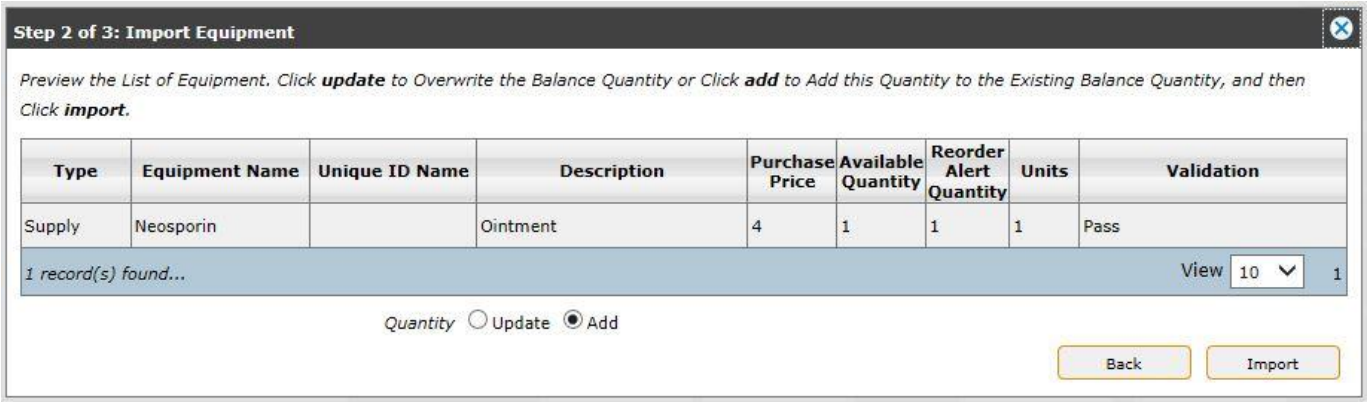
- Press **Next** to begin import (or **Clear** to remove template and re-enter information)

Click the **Download Blank Template** link to download an .xlsw file. Complete the following fields:

Field	Description
Type	Enter **Capital Equipment**, **Supply** or **Drug** to denote the type.
Equipment Name	Enter the name of the equipment (e.g., stethoscope).
Unique ID Name	Enter a unique alphanumeric ID for the equipment.
Description	Enter the equipment description.
Purchase Price	Enter the purchase price (numeric values only).
Available Quantity	Enter the available quantity.
Reorder Alert Quantity	Enter the quantity that will generate an alert to reorder.
Units	Enter the units contained in an inventory item (e.g. 100 tongue depressors to a box).

Note: DO NOT edit the row of the .xlsw file containing the column headings, whether you are important equipment, supplies, or drugs; this will affect the import process.

After completing and saving the equipment spreadsheet, browse for the file, select it, and upload it to continue using the import wizard (click **Clear** to remove the file and select another file). The following appears:



Step 2 of 3: Import Equipment

*Preview the List of Equipment. Click **update** to Overwrite the Balance Quantity or Click **add** to Add this Quantity to the Existing Balance Quantity, and then Click **import**.*

Type	Equipment Name	Unique ID Name	Description	Purchase Price	Available Quantity	Reorder Alert Quantity	Units	Validation
Supply	Neosporin		Ointment	4	1	1	1	Pass

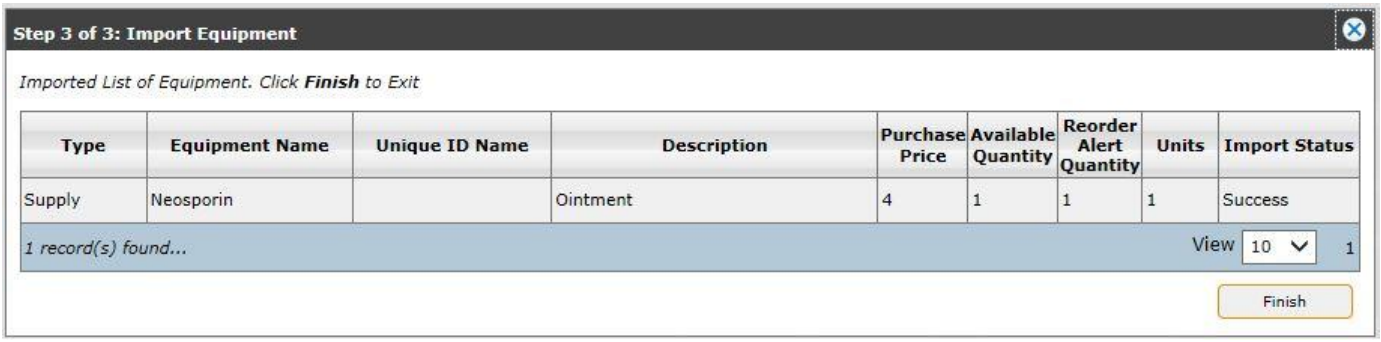
1 record(s) found... View 10 1

Quantity ○ Update ◉ Add

Back Import

Review your import information at this dialog. Click **Back** to return to the first step of the wizard and start again, or click **Import** to proceed.

Click **Import**, and the following appears:



Step 3 of 3: Import Equipment

*Imported List of Equipment. Click **Finish** to Exit*

Type	Equipment Name	Unique ID Name	Description	Purchase Price	Available Quantity	Reorder Alert Quantity	Units	Import Status
Supply	Neosporin		Ointment	4	1	1	1	Success

1 record(s) found... View 10 1

Finish

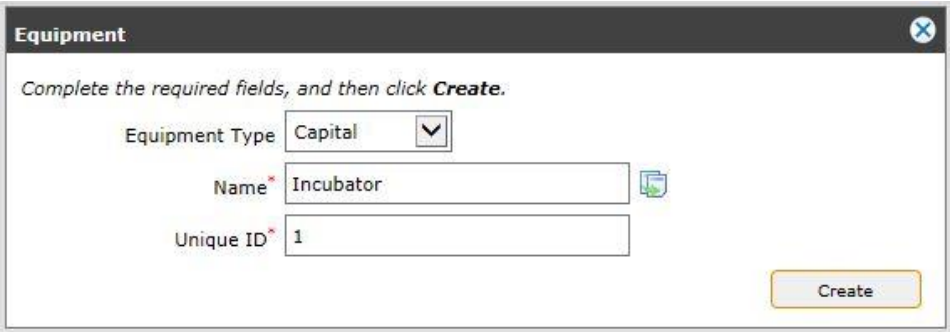
A status message appears in the last column. Click **Finish** after you have imported your equipment.

Capital Equipment

Select **Capital Equipment** from the **Explore** tab under **Inventory** to re-sort the grid by the name of the equipment (the equipment is used when scheduling a session). After the equipment type and quantity is selected for the session, it is automatically removed from the inventory.

Add New Equipment

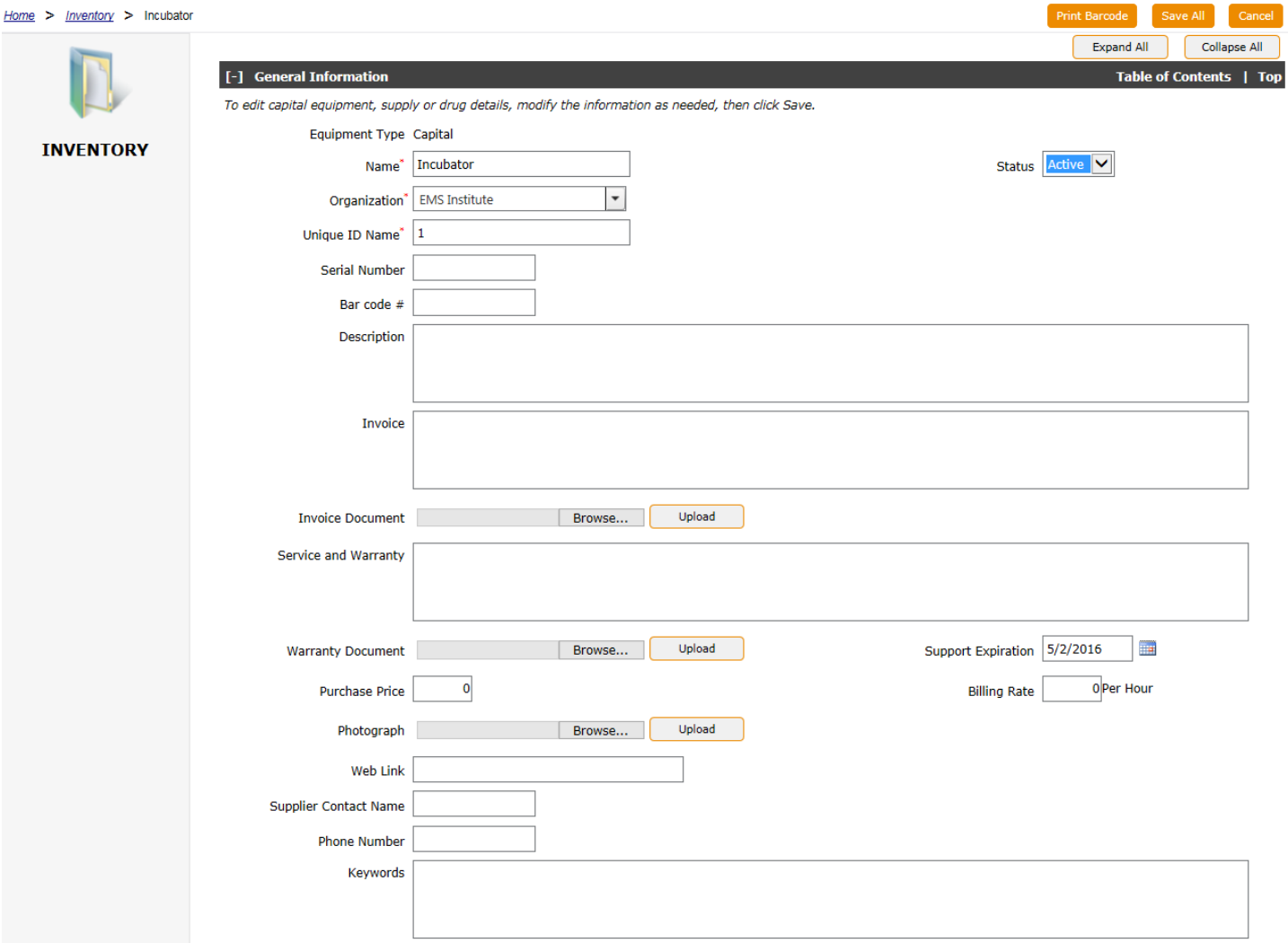
Click **Add New** in the upper right corner of the Landing Page, and the following dialog appears:



Enter the following information:

Field	Description
Equipment Type	Select either **Capital**, **Supply** or **Drug** (this populates based on the **Inventory Type** chosen at the **Explore** tab).
Name*	Enter the name of the equipment.
Unique ID*	Enter a **Unique ID** for the equipment in alphanumeric format.
*-denotes required field	

After you have entered this information, click **Create** to view the following:



Enter the following information:

Field	Description
Name*	Enter the equipment name (defaults from the prior entry).
Status	Select **Active** or **Retired** from the drop-down list.
Organization	Select the organization to which this equipment applies.
Unique ID Name*	Enter the unique ID (defaults from the prior entry).
Serial Number	Enter the serial number for the equipment.
Bar Code	Enter the bar code for the equipment.
Description	Enter a description of the equipment.
Invoice	Enter details on the invoice used for purchasing the equipment.
Invoice Document	Browse for a scanned copy of the invoice and click Upload to attach the invoice at this field.
Service and Warranty	Enter service and warranty details at this field.
Warranty Document	Browse for a scanned copy of the warranty document and click Upload to attach the document at this field.
Support Expiration	Select a support expiration date for the equipment or enter a date at this field.
Purchase Price	Enter the purchase price of the equipment.

Field	Description
Billing Rate	Enter the billing rate for use of the equipment, if applicable.
Photograph	Browse for a photograph of the equipment and click **Upload** to attach the photo at this field.
Web Link	Enter a web link for the equipment manufacturer or distributor.
Supplier Contact Name	Enter the name of the contact used for acquiring the equipment.
Phone Number	Enter the phone number of the equipment contact person.
Keywords	Enter any keywords applicable to the equipment that will facilitate a web search for it.
*-denotes required field	

1) Add Support File

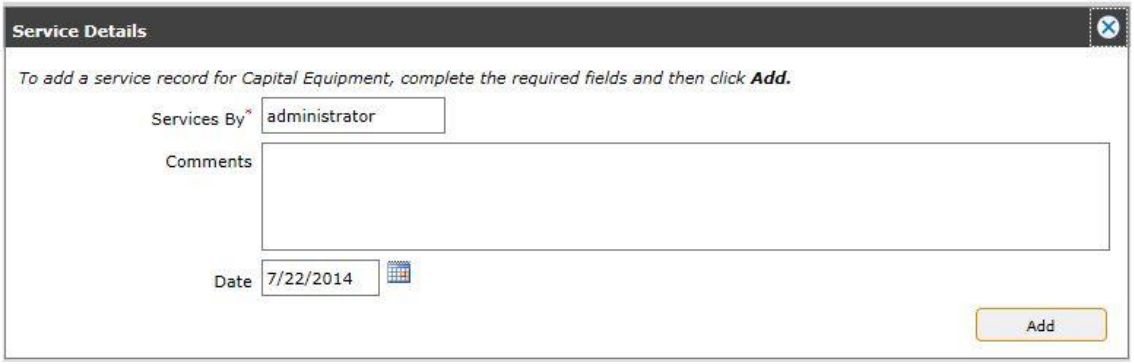
Click **Add Support File** to call up the following:

Enter the following information:

Field	Description
Document*	This displays the name of the support file.
Browse	Click this button to search for a support file.
Upload	Click **Upload** after making your selection to populate the Document field.
Update	Click this button to add the document to the equipment information.
*-denotes required field	

2) Add Service Details

Click **Add Support File** to call up the following:

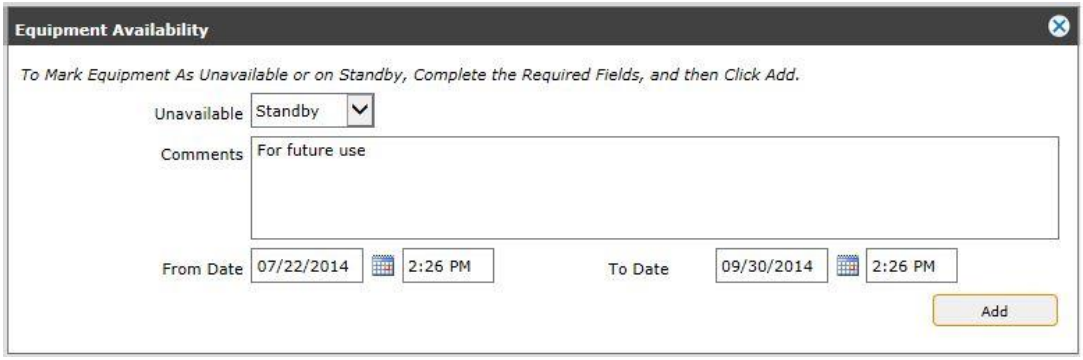


Enter the following information:

Field	Description
Services By*	Enter the name of the user entering service details.
Comments	Enter service details at this text field.
Date	Select a date that this information was entered or enter a date at this field.
Add	Click this button to add these details to the equipment information.
*-denotes required field	

3) Add Availability

Click **Add Availability** to call up the following:



Enter the following information:

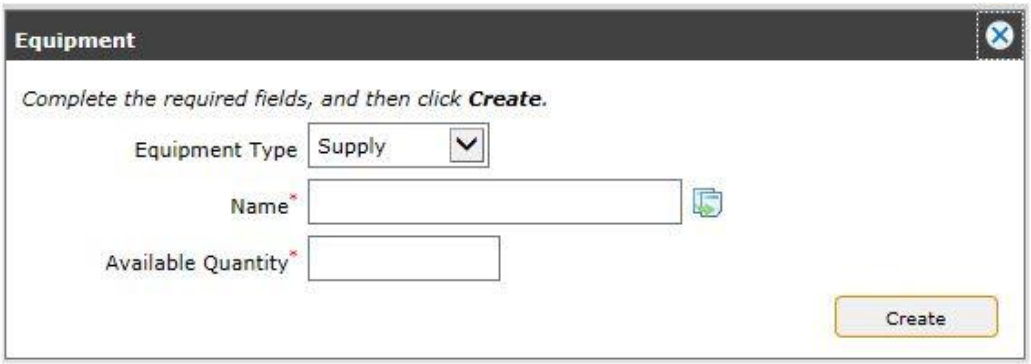
Field	Description
Unavailable	Select **Unavailable** as the default or **Standby** if the equipment will be available in the future.
Comments	Enter any comments related to the equipment.
From Date	Enter the date and time when the equipment will start to be unavailable or on "stand by."
To Date	Enter the date and time when the equipment will no longer be unavailable or on "stand by."
Add	Click this button to add the document to the equipment information.

Click **Save** to retain your selections; the Capital item now appears on the grid on the Landing Page.

Supplies

Select a Supply item from the **Explore** tab under Inventory to re-sort the grid by the name of the Supply item (the equipment is used when scheduling a session). After the equipment type and quantity is selected for the session, it is automatically removed from the inventory.

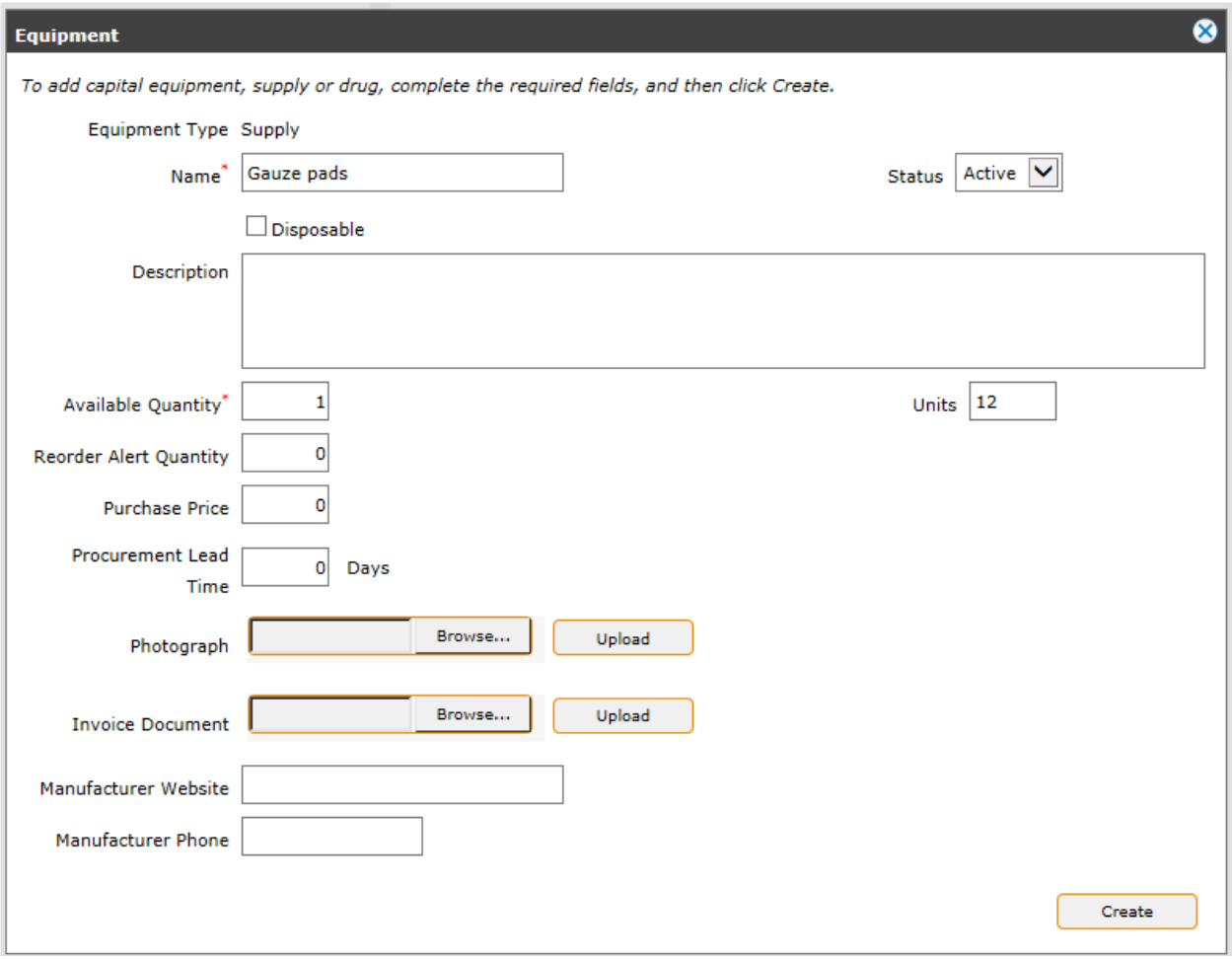
Click **Add New** from the Landing Page for Inventory/Supplies, and the following appears:



Enter the following information:

Field	Description
Equipment Type	Select either **Capital**, **Supply** or **Drug** (this populates based on the Inventory Type chosen at the **Explore** tab).
Name*	Enter the name of the supply item.
Available Quantity*	Enter the **Available Quantity** of the supply item.
*-denotes required field	

After you have entered this information, click **Create** to view the following:



Enter the following information:

Field	Description
Name*	Enter the supply name (defaults from the prior entry).
Status	Select **Active** or **Retired** from the drop-down list.
Disposable	Click this checkbox to indicate if this is a disposable item.
Description	Enter a description of the supply item.
Available Quantity*	Enter the available quantity of the item (e.g., 10 boxes of tongue depressors).
Units	Enter the number of units per item (e.g., 100 tongue depressors per box).
Reorder Alert Quantity	Enter the quantity of items that require a reorder alert.
Purchase Price	Enter the purchase price of the supply item by unit.

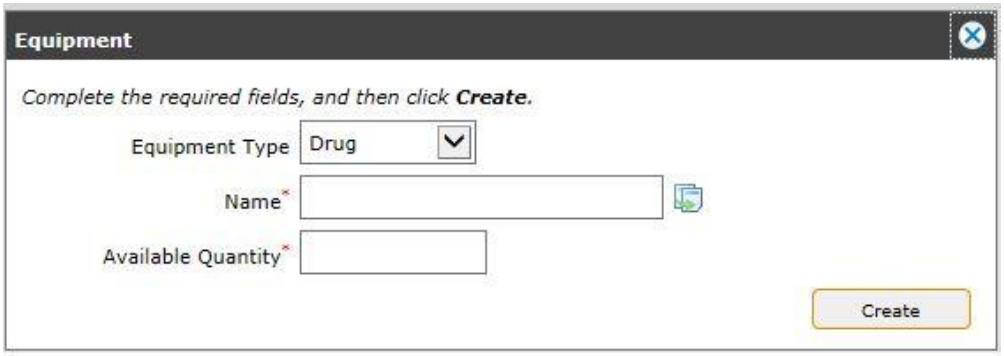
Field	Description
Procurement Lead Time	Enter the number of days to be allowed for supply item delivery from the manufacturer.
Photograph	Browse for a photograph of the supply item and click **Upload** to attach the photo at this field.
Invoice Document	Browse for a scanned copy of the invoice and click **Upload** to attach the invoice at this field.
Manufacturer Website	Enter a web link for the supply item manufacturer or distributor.
Manufacturer Phone	Enter a phone number for a contact person associated with the supply item.
*-denotes required field	

Click **Save** to retain your selections; the Supply item now appears on the grid on the Landing Page.

Drugs

Select a Drug item from the **Explore** tab under Inventory to re-sort the grid by the name of the Drug item (the equipment is used when scheduling a session). After the equipment type and quantity is selected for the session, it is automatically removed from the inventory.

Click **Add New** from the Landing Page for Inventory/Drugs, and the following appears:

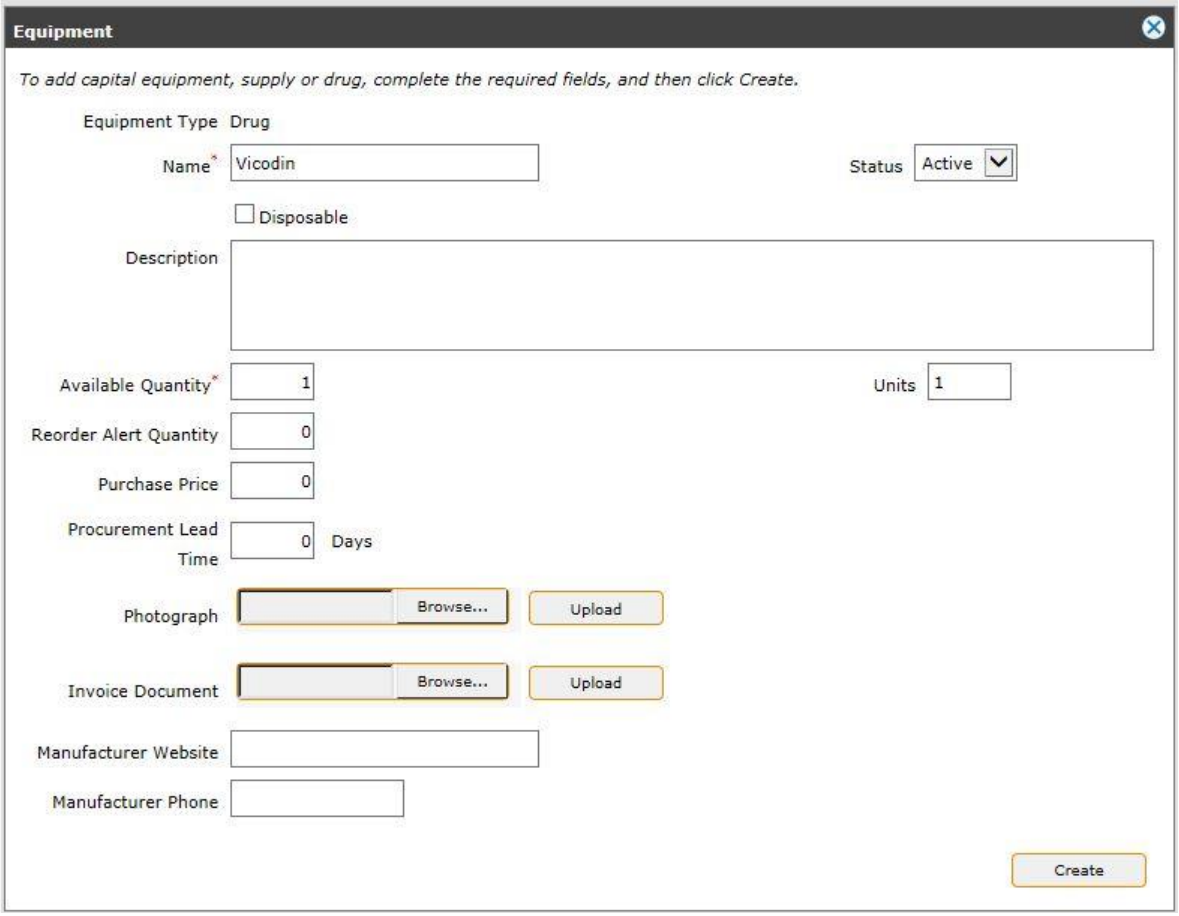


Enter the following information:

Field	Description
Equipment Type	Select either **Capital**, **Supply** or **Drug** (this populates based on the Inventory Type chosen at the Explore tab).
Name*	Enter the name of the drug item.
Available Quantity*	Enter the **Available Quantity** of the drug item.

Field	Description
*-denotes required field	

After you have entered this information, click **Create** to view the following:



Enter the following information:

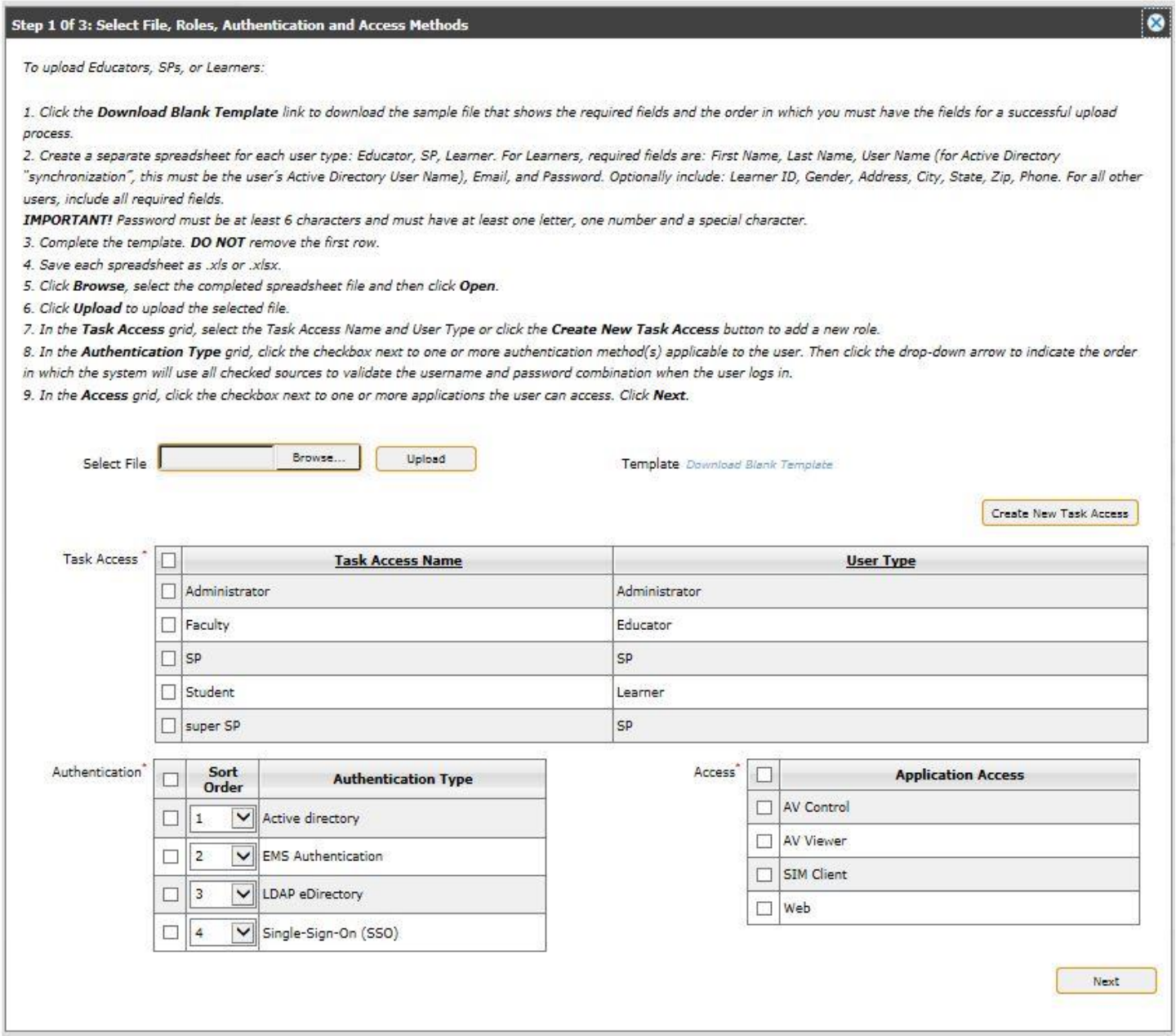
Field	Description
Name*	Enter the equipment name (defaults from the prior entry).
Status	Select **Active** or **Retired** from the drop-down list.
Disposable	Click this checkbox to indicate if this is a disposable item.
Description	Enter a description of the drug item.
Available Quantity*	Enter the available quantity of the item (e.g., 10 bottles of Ibuprofen).
Units	Enter the number of units per item (e.g., 100 250 mg pills per bottle).
Reorder Alert Quantity	Enter the quantity of items that require a reorder alert.
Purchase Price	Enter the purchase price of the drug item by unit.

Field	Description
Procurement Lead Time	Enter the number of days to be allowed for drug item delivery from the manufacturer.
Photograph	Browse for a photograph of the drug item and click **Upload** to attach the photo at this field.
Invoice Document	Browse for a scanned copy of the invoice and click **Upload** to attach the invoice at this field.
Manufacturer Website	Enter a web link for the supply item manufacturer or distributor.
Manufacturer Phone	Enter a phone number for a contact person associated with the drug item.
*-denotes required field	

Click **Save** to retain your selections; the Drug item now appears on the grid on the Landing Page.

Bulk Upload Users

Click **Bulk Upload Users** from the **Explore** tab; the following appears:



Step 1 Of 3: Select File, Roles, Authentication and Access Methods

To upload Educators, SPs, or Learners:

*1. Click the **Download Blank Template** link to download the sample file that shows the required fields and the order in which you must have the fields for a successful upload process.*
2. Create a separate spreadsheet for each user type: Educator, SP, Learner. For Learners, required fields are: First Name, Last Name, User Name (for Active Directory "synchronization", this must be the user's Active Directory User Name), Email, and Password. Optionally include: Learner ID, Gender, Address, City, State, Zip, Phone. For all other users, include all required fields.
***IMPORTANT!** Password must be at least 6 characters and must have at least one letter, one number and a special character.*
*3. Complete the template. **DO NOT** remove the first row.*
4. Save each spreadsheet as .xls or .xlsx.
*5. Click **Browse**, select the completed spreadsheet file and then click **Open**.*
*6. Click **Upload** to upload the selected file.*
*7. In the **Task Access** grid, select the Task Access Name and User Type or click the **Create New Task Access** button to add a new role.*
*8. In the **Authentication Type** grid, click the checkbox next to one or more authentication method(s) applicable to the user. Then click the drop-down arrow to indicate the order in which the system will use all checked sources to validate the username and password combination when the user logs in.*
*9. In the **Access** grid, click the checkbox next to one or more applications the user can access. Click **Next**.*

Select File [ ] Browse... Upload Template *Download Blank Template*

Create New Task Access

Task Access*

	Task Access Name	User Type
	Administrator	Administrator
	Faculty	Educator
	SP	SP
	Student	Learner
	super SP	SP

Authentication*

	Sort Order	Authentication Type
	1	Active directory
	2	EMS Authentication
	3	LDAP eDirectory
	4	Single-Sign-On (SSO)

Access*

	Application Access
	AV Control
	AV Viewer
	SIM Client
	Web

Next

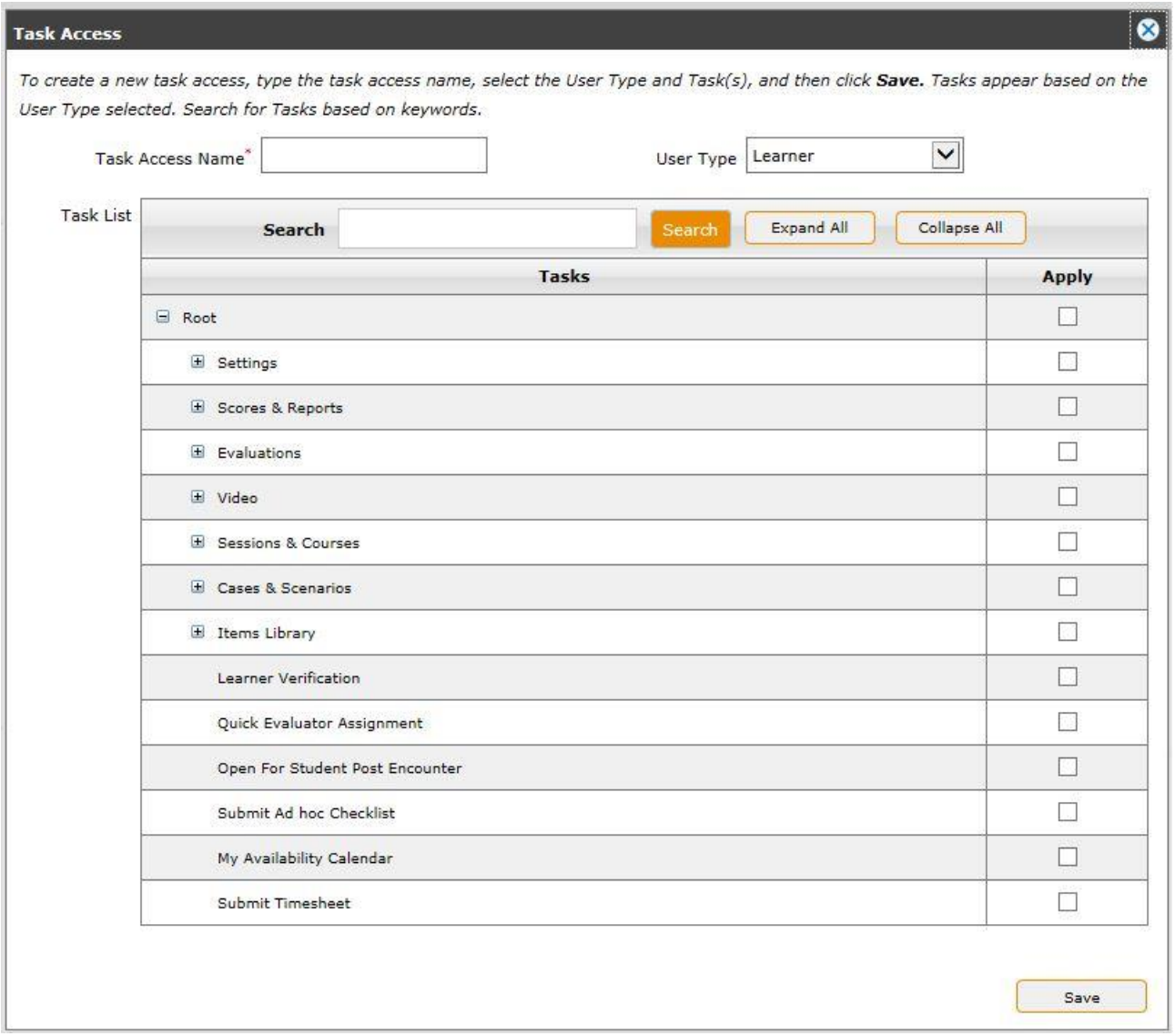
Download the template (in .xls or .xlsw format) to your "Downloads" folder and complete the field information for new users, then save the file to your network. After you have completed the form, return to the Step 1 dialog box, click **Browse** to locate the form, and then click **Upload** to bring the form into SIMULATIONiQ Enterprise.

Note: Please do not edit the format of the template in any way, or else the data may not upload properly.

After doing so, please define the following new user settings:

Field	Description
Task Access*	Select the **Task Access** by clicking a checkbox (**Faculty**, **Admin**, **SP**, **Student**, or any other task access name).
Authentication*	Select the Authentication by clicking a checkbox (**Active directory**, **EMS Authentication**, **LDAP eDirectory**, or **Single Sign-On**; **Note:** EMS Authentication must be selected to access SIMULATIONiQ Enterprise).
Application Access*	Select the **Access** to SIMULATIONiQ Enterprise by clicking a checkbox (**AV Control**, **AV Viewer**, **SIM Client**, or **Web**; **Note**: Access is also defined by the application when selecting a level of task access).
*-denotes required field	

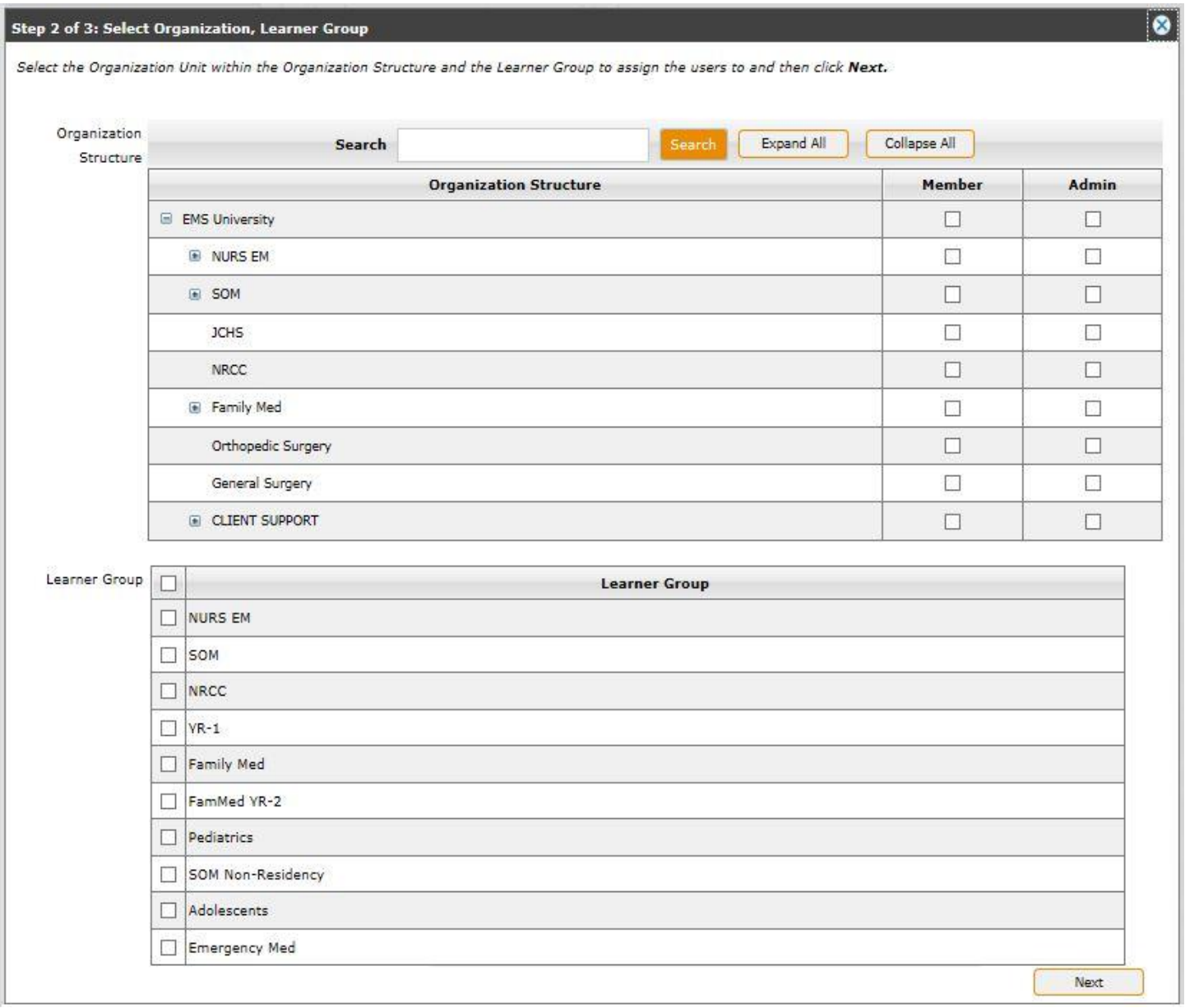
If you want two different user types to have the same access (such as an Educator or SP), you may want to create a new **Task Access Group** and assign your user to that group. To do this, click **Create New Task Access** to call up the following dialog:



This allows the Administrator to create a new level of task access based on an existing User Type. Enter a **Task Access Name***, click the checkboxes in the **Apply** column for each module available to a user with this level of task access. Click **Save** after you have made your selections (the new Task Access appears in the **Task Access** grid at Step 1 of the **Bulk Upload Users** wizard).

Note: Additional Task Access functionality is provided from the Task Access selection in the System Administration group.

After returning to the Bulk Upload Users wizard, click **Next**, and the following screen appears:



Enter any search text to locate an organizational unit within the grid; this associates those units with the users included in the **Bulk Upload** process (a user can also be associated with an organization structure when that structure is created). Choose your selections in the **Member** or **Admin** columns and select the **Learner Groups** for the users included on the **Bulk User Template** by clicking the applicable checkboxes.

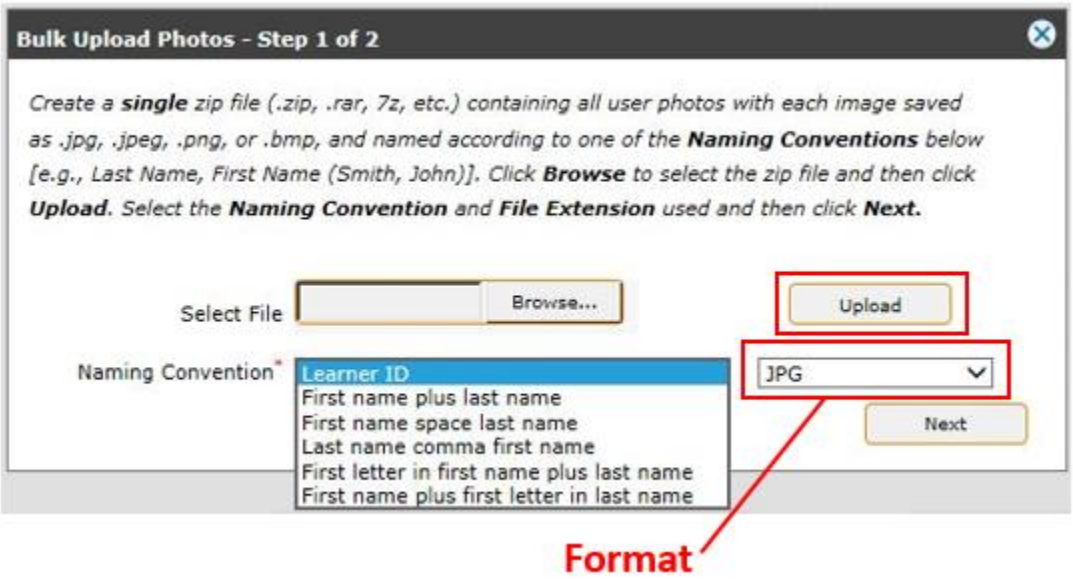
Click **Next**, and the following screen appears:

Erroneous Fields	Student ID	First Name	MI	Last Name	User Name	Email	Gender	Password	Address 1	Address 2	City	State	Zip	Country	Day Phon
	4314	Dexter		Denby	ddenby	ddenby@yahoo.com		dd@123							
		Florence		Farmer	ffarmer	ffarmer@yahoo.com		ff@123							

This lists the users included on the **Bulk User Template** to be imported into SIMULATIONiQ Enterprise. Click **Import**, and a confirmation dialog appears:

Bulk Upload Photos

Click **Bulk Upload Photos** from the **Explore** tab; the following appears:

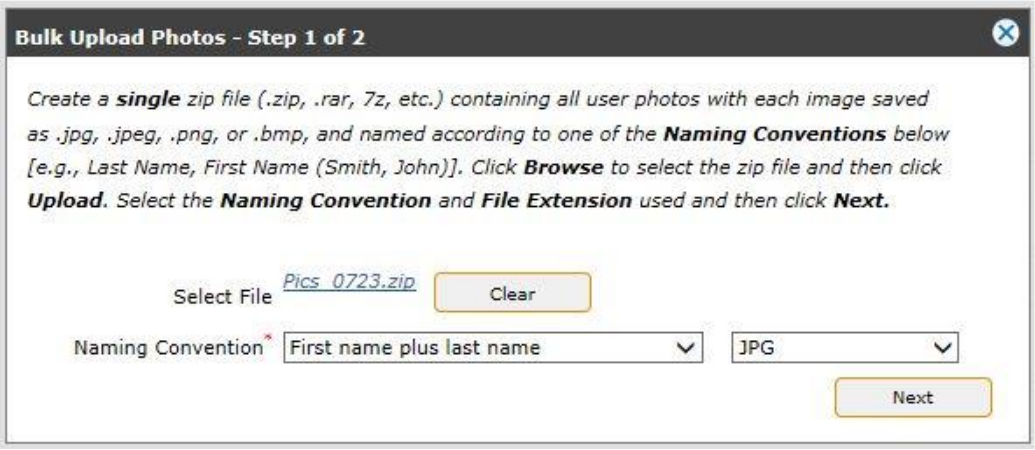


Note: Before uploading photos in accordance with the onscreen instructions, it is important that the photos in the .zip file have been saved in accordance with the naming convention selected in the drop-down list (as shown above). You may upload photos with the following extensions: .jpg, .jpeg, .png, or .bmp.

Enter the following information:

Field	Description
Select File	Select a .zip file of user photos for upload, using the **Browse** button.
Naming Convention*	Select a naming convention associated with the photos in the .zip file so the photos are mapped to your users upon upload (such as first name plus last name of the pictured users).
Format	Select the format of the photos to be uploaded from the drop-down list.
*-denotes required field	

Click **Upload** to add the .zip file of photos for your users, as shown previously:

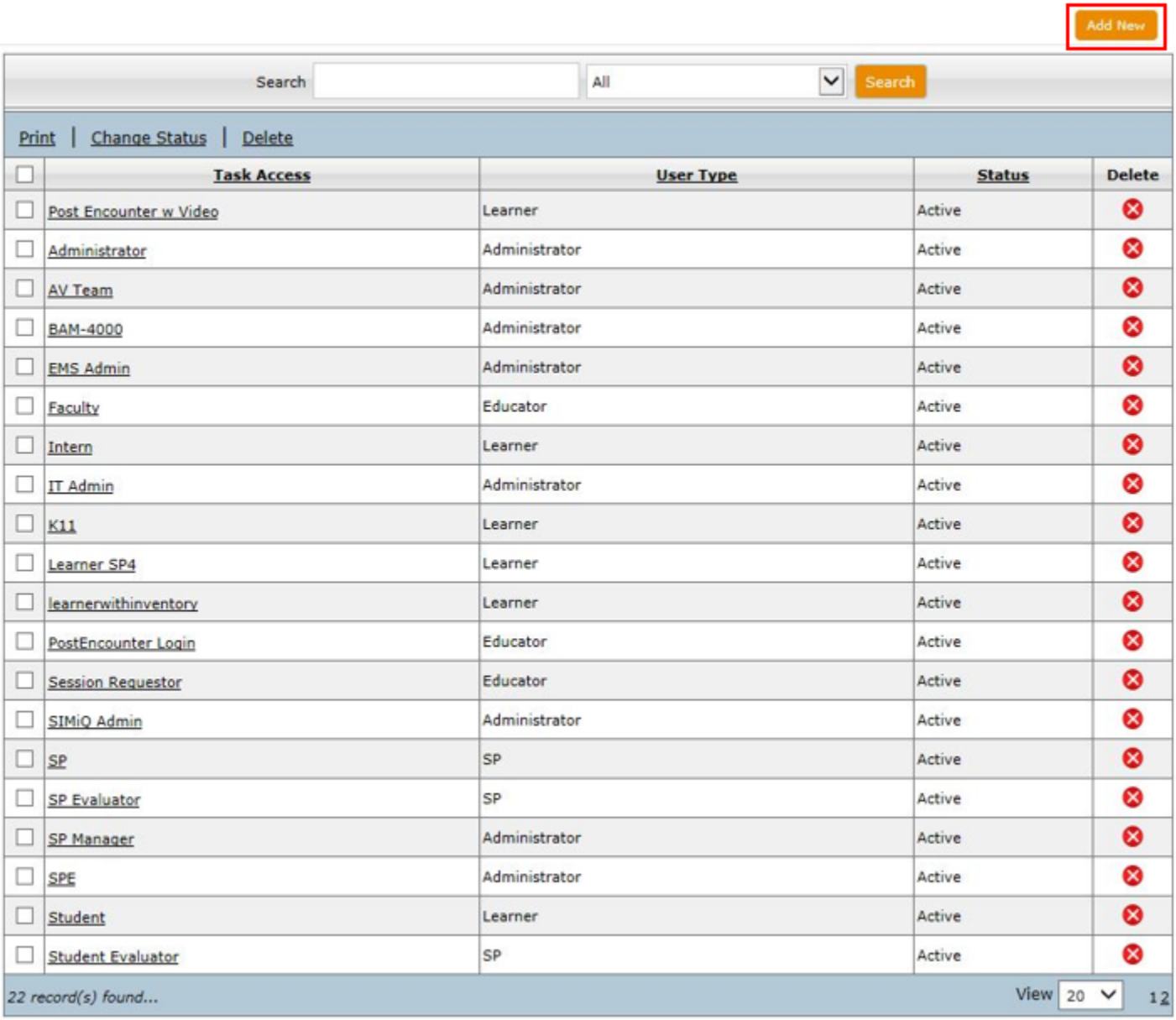


Click **Next**, and the photos appear with the users already residing in the SIMULATIONiQ Enterprise application.

Click the checkboxes associated with the photos you wish to select. After you have made your selections, click **Upload**. A confirmation message appears, and the photos are included with the user profiles based on first name plus last name in accordance with this example.

Task Access

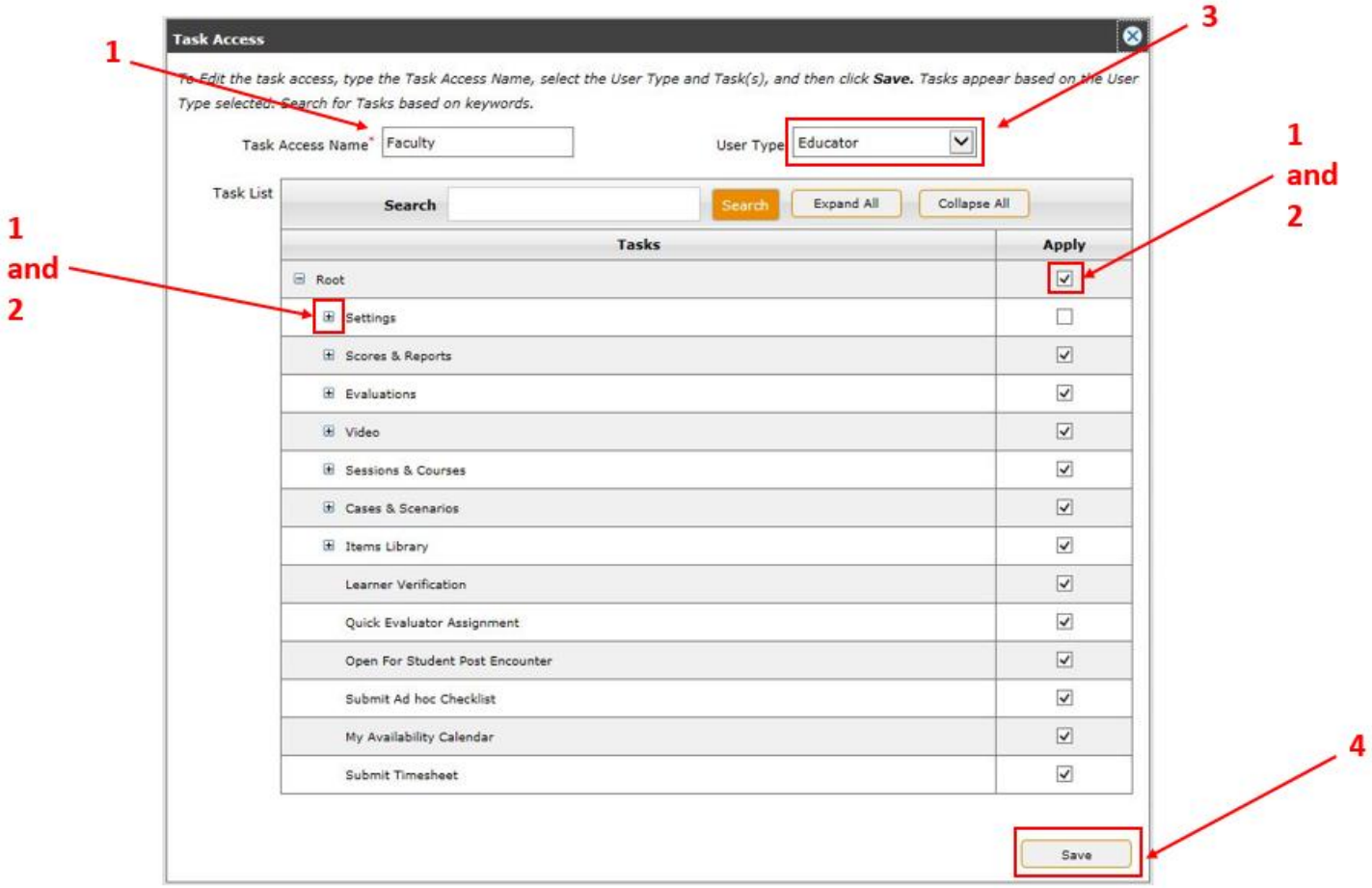
Click **Task Access** from the **Explore** tab; the following grid appears:



Task Access	User Type	Status	Delete
Post Encounter w Video	Learner	Active	
Administrator	Administrator	Active	
AV Team	Administrator	Active	
BAM-4000	Administrator	Active	
EMS Admin	Administrator	Active	
Faculty	Educator	Active	
Intern	Learner	Active	
IT Admin	Administrator	Active	
K11	Learner	Active	
Learner SP4	Learner	Active	
learnerwithinventory	Learner	Active	
PostEncounter Login	Educator	Active	
Session Requestor	Educator	Active	
SIMiQ Admin	Administrator	Active	
SP	SP	Active	
SP Evaluator	SP	Active	
SP Manager	Administrator	Active	
SPE	Administrator	Active	
Student	Learner	Active	
Student Evaluator	SP	Active	

22 record(s) found... View 20 1 2

Click the **Add New** button to call up the following (this is the same dialog as the one that appears when pressing the **Create New Task Access** button at Step 1 of the **Bulk Upload Users** wizard):



1. Enter a new **Task Access Name** at this dialog and assign module functionality as desired (i.e., Video, Evaluations, Scores & Reports, etc.). Click the ⊞ to expand your selections under a task. Click the **Apply** checkbox for the functionality you have chosen and click **Save** to associate that functionality with your new task.

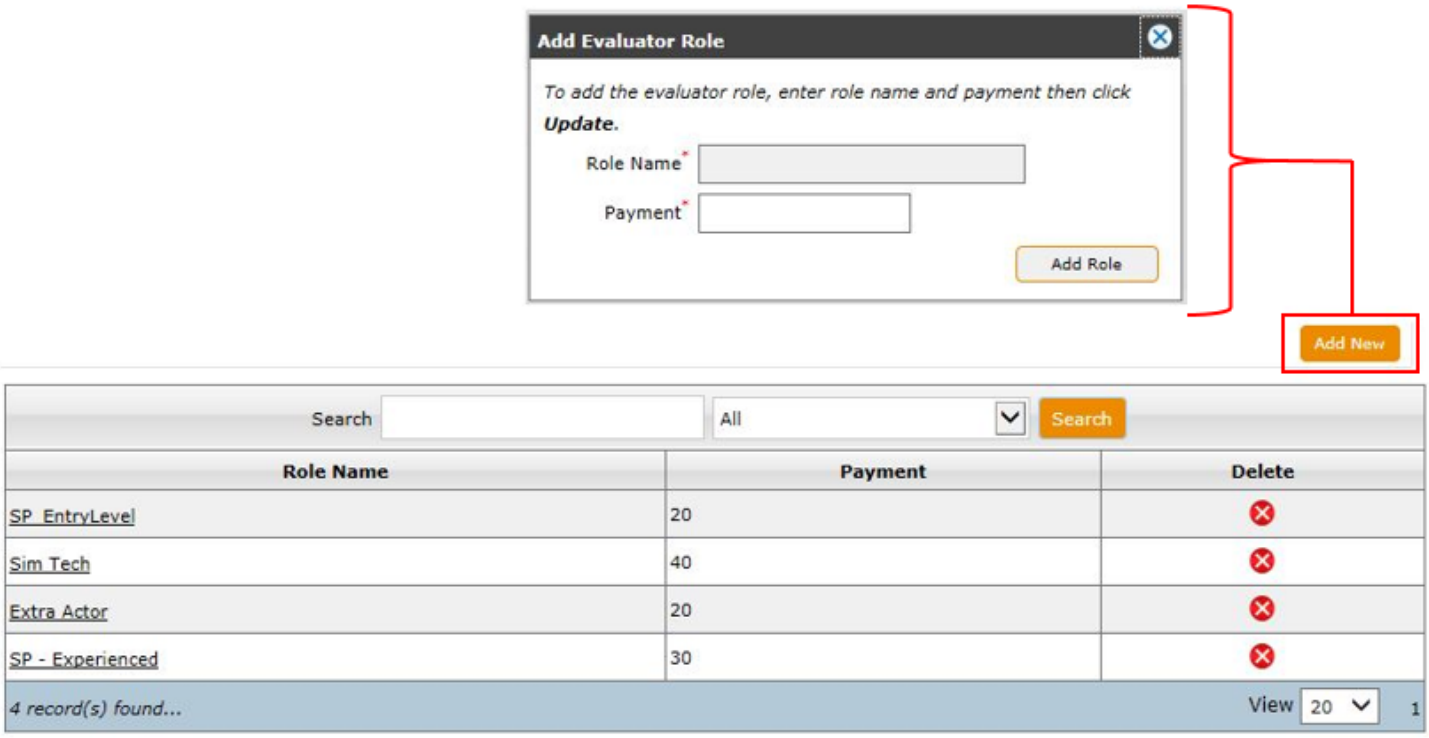
2. For an existing **Task Access Name**, click the ⊞ to expand your selections. Click the **Apply** checkbox for the functionality you have chosen and click **Save** to associate that functionality with your existing task.

3. Select a **User Type** based on an existing selection or a new type you have created.

4. After pressing **Save**, the new Task Access appears in the **Task Access** column with your selections.

Specialist Role

Click **Specialist Role** from the Explore tab; the following grid appears:



Use this functionality to store role names and payment information for evaluators in a simulation scenario. After creating a role, it can be selected from the Activity Page for your simulation session.

You can also search within the grid by selecting **All**, **Role Name**, or **Payment**.

Click the **Add New** Button to call up the dialog as shown with the following fields:

Field	Description
Role Name*	Enter the name of the role.
Payment*	Enter the payment amount for the individual associated with this role (in U.S. dollars).
*-denotes required field	

Click the **Add Role** button after you have entered your information to create the role.

System Configuration

Email Settings

Click **Email Settings** from the **Explore** tab; the following grid appears containing all Email templates:

Add New

Search | All | Search

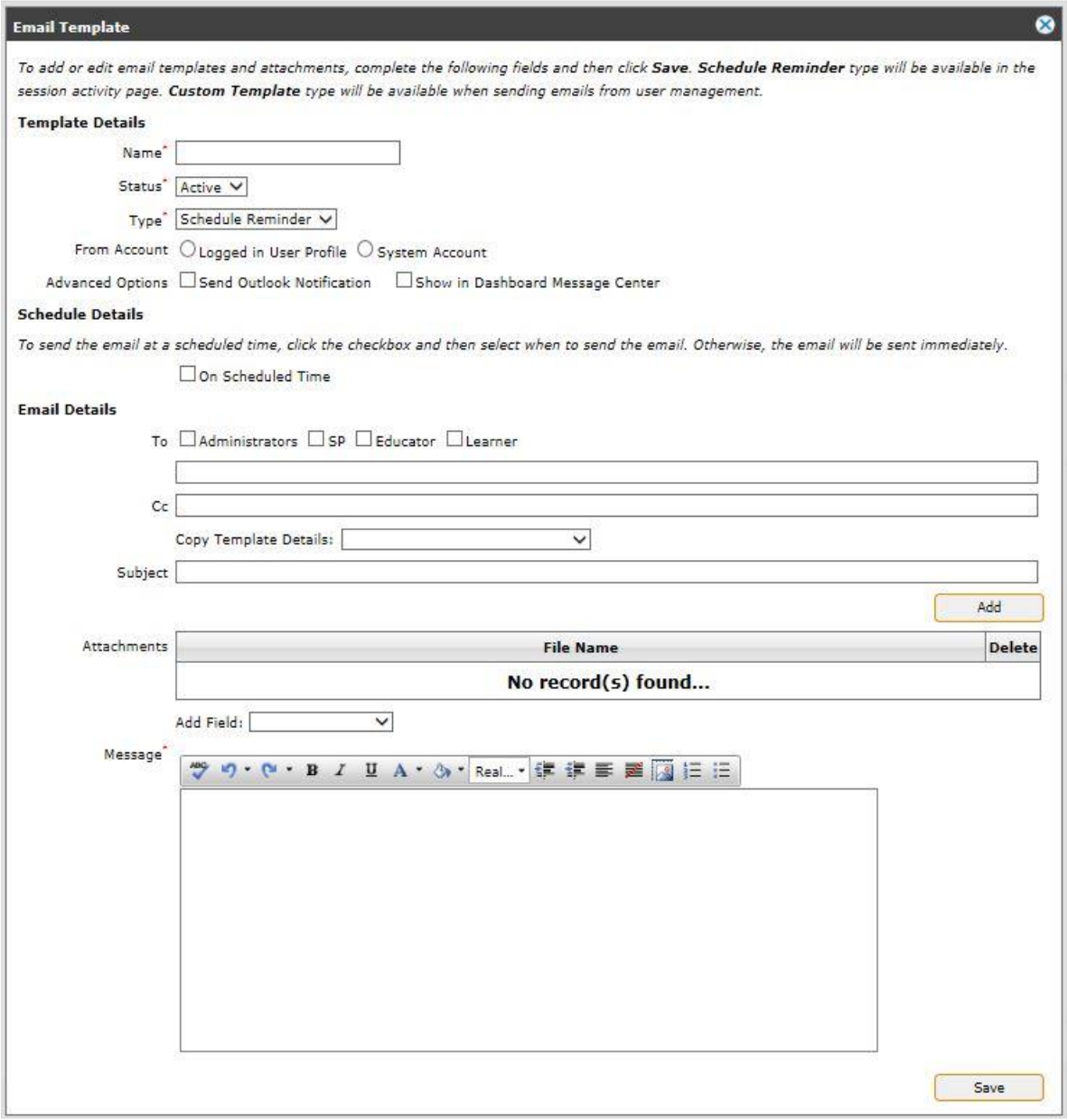
Print | Change Status | Delete

	Name	Template Details	Status	Delete
	Course Completion	Scheduling	Active	
	Course Open	Scheduling	Active	
	Educator and SP unassigned	Scheduling	Active	
	Educators Specialist Availability	Scheduling	Active	
	Equipment Availability	Inventory	Active	
	Evaluators assignment pending	Scheduling	Active	
	Forgot Password	User Management	Active	
	Inventory Out of Stock	Inventory	Active	
	Inventory Status	Inventory	Active	
	Learner Assigned	Scheduling	Active	
	Learner Unassigned	Scheduling	Active	
	New User Added	User Management	Active	
	No OMT performed notification	Scheduling	Active	
	Pending User Approved	User Management	Active	
	Pending User Rejected	User Management	Active	
	Request Canceled	Scheduling	Active	
	Request Modified	Scheduling	Active	
	Schedule Request	Scheduling	Active	
	Schedule Request Acknowledgement	Scheduling	Active	
	Scheduled Report Generation Acknowledgement	Score And Reports	Active	

29 record(s) found... View 20 1 2

Click the **Template Details** colun heading to sort all template types by category (e.g., Event).

Click **Add New** in the upper right corner to call up the following dialog:

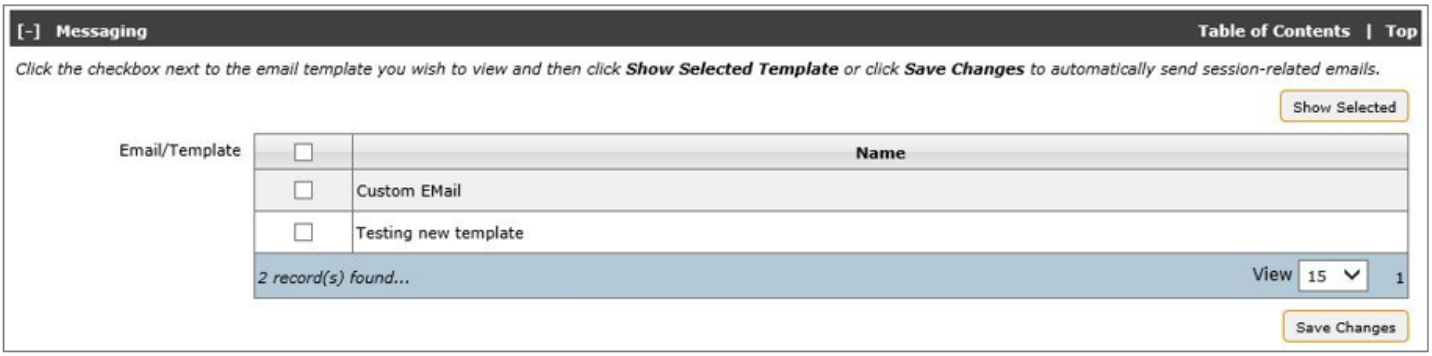


From this dialog, you can customize an Email template to be included on the search grid from the Landing Page (**Note**: Some entries will be grayed out if already populated for an existing template).

The following selections appear:

<u>Template Details</u>

Field	Description
Name*	Enter the name of the Email template.
Status*	**Retired** appears as the default (Email templates must be in **Active** status for use).
Type*	Select **Schedule Reminder** (to remind session attendees) or **Custom Template** from the drop-down list (if **Custom Template** is selected, the To Email default checkbox selections disappear).
Email Options	Click the **User Email** button to generate an Email for a single user based on this template. Click the **Group Email** button to generate an Email using this template for a group of users scheduled for a session (the picture below shows an Email template selected on that session's activity page).
*-denotes required field	



Field	Description
From Account	Click the **Logged in User Profile** radio button to generate an Email using this template from the administrator who is currently logged onto SIMULATIONiQ Enterprise. Click the **System Account** radio button to generate a system-sent Email using this template (no response to the Email is permitted if the Email is system generated).
Advanced Options	Click the **Send Outlook Notification** checkbox to generate an Outlook message to the designated user(s) when an Email is sent using this template. Click the **Show in Dashboard Message Center** checkbox to generate a dashboard notification to the designated user(s) when an Email is sent using this template.

Email Details

Field	Description
To	Select from the **Administrator**, **SP**, **Educator** or **Learner** checkboxes (available for the **Schedule Reminder** template

Field	Description
	type). You can also enter Email addresses for users in the text field.
Cc	Enter Email addresses to be copied on Emails using this template in the text field.
Copy Template Details	If creating a new template from an existing template, select an existing template from the drop-down list.
Subject	Enter the title of the Email to be generated from this template.
Attachments	Click the **Add** button to call up the following:  Click **Browse** to search for a photo to add to the Email template. Click **Upload** to add the photo. Click **Save Changes** when you are finished.
Add Field	Select **Schedule Name**, **Schedule Time**, **First Name**, **Scheduled Date**, or **Room Scheduled** to add any of these fields to the body of the message.
Message*	Enter the text for the Email generated from this template.
*-indicates a required field	

Note: For some scheduling Email templates, you can enter primary, secondary, or employer Email addreses after clicking the applicable checkboxes on the template dialog page.

The following email details are available by default from the template selections on the Landing Page grid:

Template Type	Subject	Email Text
Course Completion	Successful completion of @@CourseName@@	Dear @@Recipient@@, Congratulations on the successful completion of @@CourseName@@ course. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Course Open	@@CourseName@@ is now open for registration.	Dear @@Recipient@@,

Template Type	Subject	Email Text
		The following course is now open for registration. Click the registration link from your dashboard to access. @@CourseName@@ @@StartDate@@ @@EndDate@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email. Please do not reply to this email*.
Educator and SP unassigned	You have been unassigned from @@ScheduleName@@ @@ScheduleDate@@ @@ScheduleTime@@	Dear @@Recipient@@, You have been unassigned from : Schedule Name = @@ScheduleName@@ Schedule Time = @@ScheduleTime@@ ScheduleDate = @@ScheduleDate@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email. Please do not reply to this email.*
Educators Specialist Availability	Educators Specialist Availability for Session	Dear @@Recipient@@, The following Specialists have confirmed/not confirmed their availability: Schedule Name = @@ScheduleName@@ Schedule Time = @@ScheduleTime@@ ScheduleDate = @@ScheduleDate@@ @@Report@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email. Please do not reply to this email.*

Template Type	Subject	Email Text
Equipment Availability	Inventory Availability	Dear #<Selected List> And Administrators#, The following equipment is available: #Due Date# #Equipment Name# #application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Evaluators Assignment Pending	Reminder to complete evaluation	Dear @@Recipient@@, You have one or more evaluations pending. Please login into @@link@@ to review and complete evaluations assigned to you. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Event Approved	Notification an Event has been Approved	Dear @@Recipient@@, The following requested event has been approved. Event Name: @@EventName@@ Event Date: @@EventDate@@ Event Time: @@EventTime@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Event Rejected	Notification an Event has been Rejected	Dear @@Recipient@@, The following event request has been rejected:

Template Type	Subject	Email Text
		Event Name: @@EventName@@ Event Date: @@EventDate@@ Event Time: @@EventTime@@ Please contact the SIMULATIONiQ Enterprise System Administrator with any questions. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Event Request	Notification an Event has been Requested	Dear @@Recipient@@, Administrators @@RequestedBy@@ has requested an event. Event Name: @@EventName@@ Event Date: @@EventDate@@ Event Time: @@EventTime@@ Thanks & Regards, SIMULATIONiQ Enterprise Administrator. *This is an automated email.* *Please do not reply to this email.*
Event Request Acknowledgement	Notification to the requestor that an Event Acknowledgement has been received	Dear @@Recipient@@, We received your event request: Event Name: @@EventName@@ Event Date: @@EventDate@@ Event Time: @@EventTime@@ Duration : @@Duration@@ You will be notified by email if your event request is approved. Thanks & Regards, SIMULATIONiQ Enterprise Administrator. *This is an automated email.* *Please do not reply to this email.*
Forgot Password	New Password for Application	Dear #User#,

Template Type	Subject	Email Text
		We received your request and have changed your password for the application. Your new password is: #password# #application link# Please contact your System Administrator with any questions. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Inventory Out of Stock	Inventory: Out of Stock notice	Dear #<Selected List> And Administrators#, The following equipment is out of stock: #Equipment Name# #Threshold# #Quantity# #Available for User# #Already Scheduled# #Balance# #application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Inventory Status	Inventory Status Reminder	Dear #<Selected List> And Administrators#, The following equipment is below the minimum quantity level: #Equipment Name# #Threshold# #Quantity# #Available for User# #Already Scheduled# #Balance#

Template Type	Subject	Email Text
		#application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Learner Assigned **(Note:** This Email provides the **Session** start time, not the Encounter start time.)	Session for [Request Date/Time]	Dear # Assigned Learners AND <Selected List> AND Administrators#, The following EMR patient is scheduled for this session: #Start Date and End/Due Date# #Schedule Name# #Scenario Name# #Schedule Time# #application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Learner Unassigned	Session for [Request Date/Time]	Dear #Assigned Learners AND <Selected List> AND Administrators#, You are no longer scheduled for the following session: #Request Date# #Requested By# #Schedule Name# #Scenario Name# #Schedule Time# #application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
New User Added	New Login Credentials for Application	Dear #User#,

Template Type	Subject	Email Text
		Welcome to the SIMULATIONiQ Enterprise application. 1. Please click the following link to access the SIMULATIONiQ Enterprise web site: #application link# 2. On the **Login** screen, type: **Login ID:** #Login ID# **Password:** #P# 3. Click the **Sign In** button. Please contact your System Administrator with any questions. Regards, SIMULATIONiQ Enterprise System Administrator *This is an automated email. Please do not reply to this email.*
No OMT performed notification	OMT Rater Responded as No OMT Performed	Dear @@Recipient@@, OMT Rater Responded as No OMT Performed for the Session: Session Name: @@ScheduleName@@ Session Date: @@SessionDate@@ Session Time: @@SessionTime@@ Case Name: @@ScenarioName@@ Learner: @@LearnerName@@ Evaluator: @@EvaluatorName@@ Date: @@ScheduleDate@@ Regards, SIMULATIONiQ Enterprise System Administrator *This is an automated email. Please do not reply to this email.*
Participant Assigned for Event	Notification to a participant that they are assigned to an event.	Dear @@Recipient@@, You are scheduled for the following event: @@EventName@@ @@EventDate@@

Template Type	Subject	Email Text
		@@EventTime@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Participant Unassigned for Event	Notification to a user that they are not assigned to an Event.	Dear @@Recipient@@, You are unassigned for the following event: @@EventName@@ @@EventDate@@ @@EventTime@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Pending User Approved	New Login Credentials for Application	Dear #<Selected List> AND Administrators#, #Username# has requested access to the SIMULATIONiQ Enterprise system: #Username# #Full Name# #Date Signed# #application link#
Pending User Rejected	Request Notification	Dear #User#, We received your request to access the application. Your request has been rejected. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Request Canceled	Canceled Session Request for [Request Date/Time]	Dear #Requested faculty AND <Selected List> AND Administrators#, The following session request has been canceled:

Template Type	Subject	Email Text
		#Request Date# #Schedule Name# #Scenario Name# #application link# Please contact your System Administrator with any questions. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Request Modified	Modified Session Request for [Schedule Name/Date/Time]	Dear #Requested faculty AND <Selected List> AND Administrators#, Your session request has been modified and approved: #Request Date# #Schedule Name# #Scenario Name# #application link# Please contact your System Administrator with any questions. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Schedule Request	New Session Request for [Request Date/Time]	Dear #<Selected List> AND Administrators#, #Requested By# has requested a session: #Schedule Name# #Institute Name# #DateTime# #Duration# #DateTime 2# #Duration 2# #application link#

Template Type	Subject	Email Text
Schedule Request Acknowledgement	New Session Request for [Schedule Name/Date/Time]	Dear #Requested By#, We received your session request: #Schedule Name# #Institute Name# #DateTime# #Duration# #DateTime 2# #Duration 2# You will be notified by email if your session request is approved. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Schedule Report Generation Acknowledgement	Scheduled Report Generation Acknowledgement	Scheduled report(s) are generated on @@GeneratedOn@@. Regards, This is an automated email. Please do not reply to this email.
Self-Signup Acknowledgement	Self-Registration	Dear #User#, We received your request to access the application. If your application is approved, you will be notified by email. Regards, SIMULATIONiQ Enterprise System Administrator This is an automated email. Please do not reply to this email.
Self-Signup Notification	Login Credentials for SIMULATIONiQ Enterprise Application	Dear #<Selected List> AND Administrators#, #Username# has requested access to the SIMULATIONiQ Enterprise system. #Username# #Full Name# #Date Signed#

Template Type	Subject	Email Text
		#application link#
Session Canceled	Canceled Session for [Request Date/Time]	Dear #Requested faculty AND <Selected List> AND Administrators#, The following session request has been canceled: #Request Date# #Schedule Name# #Scenario Name# #application link# Please contact your System Administrator with any questions. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email. Please do not reply to this email.*
Session Rescheduled – Educators	Confirmed Session for [Request Date/Time]	Dear #All Educators AND <Selected List> AND Administrators#, The following session has been rescheduled: #Request Date# #Requested By# #Schedule Name# #Scenario Name# #Schedule Time# #application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email. Please do not reply to this email.*
Session Rescheduled – Learners	Rescheduled Session for [Request Date/Time]	Dear #All Learners AND <Selected List> AND Administrators#, The following session has been rescheduled:

Template Type	Subject	Email Text
		#Request Date# #Requested By# #Schedule Name# #Scenario Name# #Schedule Time# #application link# Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
SP/Educators/Support Staff assigned to session	Assigned to Session @@ScheduleName@@ scheduled @@ScheduleDate@@ @@ScheduleTime@@	Dear @@Recipient@@, You are scheduled for the following session: Session Name : @@ScheduleName@@ Scenario Name : @@ScenarioName@@ Role: @@Role@@ Evaluation Type : @@EvaluationType@@ Evaluation Due Date : @@DueDate@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Statistics Generation Acknowledgement	Statistics Generation Acknowledgement (Scores and Reports)	Statistics Generation Acknowledgement @@GeneratedOn@@. Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Survey Assigned	Survey Assigned @@SurveyName@@ Due Date @@DueDate@@	Dear @@Recipient@@, The following session has been scheduled:

Template Type	Subject	Email Text
		Survey Name = @@SurveyName@@ Due Date = @@DueDate@@ Regards, SIMULATIONiQ Enterprise Administrator *This is an automated email.* *Please do not reply to this email.*
Suspicious Note notification	SOAP Note Marked as Suspicious	Dear @@Recipient@@, The following SOAP Note Marked as Suspicious: Session Name: @@ScheduleName@@ Session Date: @@SessionDate@@ Session Time: @@SessionDate@@ Case Name: @@ScenarioName@@ Learner: @@LearnerName@@ Evaluator: @@EvaluatorName@@ Date: @@ScheduleDate@@ Regards, SIMULATIONiQ Enterprise System Administrator *This is an automated email.* *Please do not reply to this email.*

Parameters

WARNING: <u>Making changes to Parameter settings without consulting EMS Client Support may result in undesirable behavior.</u>

Click **Parameters** from the Explore tab, and the **Parameters** Activity Page appears. This lists all SIMULATIONiQ Enterprise parameters that can be customized to meet the needs of your training institution.

The **Parameters** appear as follows:

General Parameters

Name	*Details*	*Default*	*Values*
Default time zone of the customer	Time zone of the IIS Server – default is EST	EST	Eastern Standard Time - EST Central Standard Time - CST Pacific Standard Time - PST
Delete all audit logs after	Number of days after which all audit logs will be deleted. Default is 30 days. Enter number between 1 and 30.	1	1-30 (To learn more about audit functionality, click here.)
Request event from portal page	Click **Yes** to request an event from the portal page (event assigned to **Pending** status)	Yes	Yes/No
Enable public calendar from portal page	Click **Yes** to enable viewing of your center's calendar from the portal page.	Yes	Yes/No
Application installation folder *(to be modified only if the client moves the server or the IP address changes)*	File path to the folder where web application is installed	N/A	255-character string
Public Application URL	File path to the folder where the web application is installed if installed on a public site.	N/A	255-character string
Application URL *(to be modified only if the client moves the server or the IP address changes)*	Web application URL	N/A	255-character string
Document storage folder *(to be modified only if the client moves the server or the IP address changes)*	File path to folder where supporting documents are stored	N/A	255-character string
Document storage URL *(to be modified only if the client moves the server or the IP address changes)*	Documents URL	N/A	255-character string
Show Apply for a Job link from SIMULATIONiQ Enterprise application home page for SP to apply for a job.	Click **Yes** to enable SPs to apply for a job from the login screen.	Yes	Yes, No
Supported document file formats *Note: 1) Client can add or remove file types.* *2) File types not listed here can be downloaded.* *3) Maximum file size is 2 GB.*	List of viewable document file types	DOC, DOCX, XLS, XLSX, PDF, XPS, TXT, PPT,	N/A

Name	*Details*	*Default*	*Values*
		PPTX, ZIP	
Supported image file formats *Note: 1) Client can add or remove file types.* *2) File types not listed here can be downloaded.* *3) Maximum file size is 2 GB.*	List of viewable image file types	PNG, JPG, JPEG, BMP, GIF, TIF	N/A
Show Sign Up link from application home page for learner self-sign up	Click **Yes** to enable learners to request access from the login screen.	No	Yes, No
In learner portal, Number of days past session date learner post encounter is available	Number of days past the schedule date to show learner post encounter in the learner dashboard	0	Integer from 0 to 99
Supported audio file formats *Note: 1) Client can add or remove file types.* *2) File types not listed here can be downloaded.* *3) Maximum file size is 2 GB.*	List of playable audio file types	WAV, WMV, VLC 3GP MP4 MP3 H264 MOV	N/A
Supported video file formats *Note: 1) Client can add or remove file types.* *2) File types not listed here can be downloaded.* *3) Maximum file size is 2 GB.*	List of viewable video file types	WMV, 3GP 264 MP4	N/A
Nightly Database backup folder	File path to backup folder	Max 255 characters	N/A
Number of days to retain database backup files	Number of days databse backup files will be retained	Enter days between 2-30	Integer from 2-30
Hide Forgot Password link from SIMULATIONiQ Enterprise application logon page	Hide “Forgot Password” link appearing at logon	No	Yes, No
Comma separated Public IP addresses or server names used to access the application *(for example, if the campus is on another network/domain, this is where you enter the IP Address/Server to access)*	List of public IP addresses or server names used to access SIMULATIONiQ Enterprise	N/A	Max 2000 characters
Kiosk message timout duration in seconds	Number of seconds after the timeout message on the Kiosk that the login screen appears	15	NN
Kiosk timeout message duration	Number of seconds of idle time until a time-out	45	NN

Name	*Details*	*Default*	*Values*
	message appears on the Kiosk		
Default Kiosk Check Out Time	Default check out time in hours	23	NN
Time to display Kiosk Welcome Page content for each section	Number of seconds to display welcome text, events and Power Point presentation in Kiosk	15	NN
Enable user access security?	Locks or grants user access to data	No	Yes, No (please refer to Appendix A here for more information)
If the previous parameter is set to Yes, select the default security access for the following (Case, Schedule, Room)	Enable access restrictions for Cases, Sessions, Rooms, and live video	N/A	• Author-Only (only the author of the security objects, including case, scenario, session or room, can access – must belong to an organization unit) • Organization Unit (object access granted based on selected organization unit, including learner groups) • Public (object access to all organization units)
Hide Session name on public calendar	Click **Yes** to hide the Session name		• Default is No
Disable users ability to edit their user profile	Remove ability for users to edit their user profile		• Default is No
Show regular text box instead of rich text box	Hide the formatting tool bar for all text box fields.		• Default is No

Cases and Scenarios

Name	*Details*	*Default*	*Values*
Case Collection Workflow Enabled • When set to **Yes**, the Case Collection will be created as **Pending** (**Approved** and **Rejected** statuses are also available). • Pending case collections show on the dashboard for all educators. • Users can approve or reject Case Collections.	Click **Yes** to create a set of cases in the Cases & Scenarios module. The minimum number of cases to pass the session and the required pass percentage applies to all cases in the collection.	No	Yes, No

• Only approved Case Collections will be displayed in the Session module.			
Case support files in case definition label	Name of the first case support file	N/A	255-character string
Case support files in case definition label	Name of the second case support file	N/A	255-character string
Case support files in case definition label	Name of the third case support file	N/A	255-character string
Case support files in case definition label	Name of the fourth case support file	N/A	255-character string
Case support files in case definition label	Name of the fifth case support file	N/A	255-character string
Show case status	"Being reviewed" message appears when a reviewer opens the case for review, but does not stop another reviewer from reviewing or approving the case.	Yes	Yes, No

Scheduling

Name	*Details*	*Default*	*Values*
Hide the AV Section from Session Activity page and Session Detail Report	Click **Yes** to hide the AV section on the Session creation screen and the Session Details Report.	No	Yes, No
Mark User Availability for Sessions (for NBOME) When set to **Yes**, the user can mark availability for a date range and time or click	Click **Yes** to display the participants assigned to sessions and their confirmation status.	No	Yes, No
Show case name on the dashboard 's To Do List	Select **Case Name** to display the Case/Scenario name in the To-Do List on the Dashboard.	Case Name	None, Case Name, Case Title
Show time preference in sessions	Click **Yes** to display specific time ranges to select from when creating a session.	No	Yes, No
Check SP Availability	Click **Yes** to display the user availability schedule when creating a session.	No (Show Available SPs checkbox will not be checked by default when scheduling	Yes, No

		a session).	
Allow user availability for date range (only for session dates)	Click **Yes** to display specific time ranges to select from when adding user availability.	Yes	Yes, No

Email/Text Messaging

Name	*Details*	*Default*	*Values*
Mobile phone service provider (Client IT Department)	Cell Phone service provider	AT&T	AT&T, Sprint, T-Mobile, Verizon
Mobile phone number to text (SMS) when there is a critical system error	Cell phone number to text a system-generated message when there is a critical system error.	N/A	10-character number value only (no dashes) **Note**: Clicking the **Test SMS** button sends a message to this number; use this only if there is a critical error.
SMTP server to be used for email communication *(supplied by the customer IT department to the EMS Project Manager)*	Email server to send and receive email messages.	N/A	SMTP values depends on client
Port used for SMTP communication *(supplied by the customer IT department to the EMS Project Manager)*	Port used to send and receive Email messages	25	Integer between 1 and 9999
Additional SMTP security required. TLS or SSL *(supplied by the customer IT department to the EMS Project Manager)*	Select whether additional email security is required: Transport Layer Security (TLS) or Secure Sockets Layer (SSL).	None	None, TLS, SSL
SMTP account used to authenticate against the SMTP server while sending emails *(used for sending secure Email only – not the account for all Email addresses)*	SMTP account used to authenticate against the SMTP Server while sending emails.	N/A	String (100 characters)
SMTP password used to authenticate against the SMTP server while sending emails *(used for sending secure Email only – not the account for all Email addresses)*	SMTP password used to authenticate against the SMTP Server while sending emails.	N/A	String (100 characters)
Email address used when sending emails from the service application *(the AV Services running in the background)*	From email address used when sending emails from the service applications.	N/A	String (100 characters) **Note**: Click the **Test Email** button to validate address.
Email addresses to send critical errors	Email address to email when there is a critical system error.	N/A	List of validated Email addresses, separated by comma or semicolon

Name	*Details*	*Default*	*Values*
Email address of EMS Support	Email address of EMS support team to send critical errors and periodic system status.	support@ems-works.com	support@ems-works.com

AV General

Name	*Details*	*Default*	*Values*
Allow start/stop video recording from the dashboard page	Click **Yes** to enable live recording	Yes	Yes, No
Allow video recording in rooms without participants assigned	• When set to **Yes**, Enterprise will record rooms even if there are no participants assigned. • When set to **No**, Enterprise will not record rooms even if there are no participants assigned.	Yes	Yes, No
Allow Video access to SPs	Click **Yes** to enable SPs to have access to video at all times.	No	Yes, No
Allow Live Video access to SPs	Click **Yes** to enable SPs to have access to Live video at all times.	No	Yes, No
Allow Video access to learners	Click **Yes** to enable learners to have access to video at all times.	Yes	Yes, No
Allow Video download to learners	Click **Yes** to enable learners to download video.	No	Yes, No
Allow Video access to evaluator *(assigned by educator as evaluator to the session)*	Click **Yes** to enable Evaluators to access video at all times.	Yes	Yes, No
Allow Video download to evaluator *(assigned by educator as evaluator to the session)*	Click **Yes** to enable Educators to download video.	No	Yes, No
Maximum default duration for manually started video recording	Number of minutes for which a manually started video must record. Enter number between 30 and 240.	180 minutes	Integer between 30 and 240 (Max is 240 minutes, or 4 hours. This refers to how long the camera will run if manually starting a recording. This is a safeguard against excessive video length if the user forgets to stop recording.)
Interval to check and synchronize video play back (seconds; a value between 2 and 60 is optimal)	This is used to synchronize playback during debriefing. Number of seconds for which to check and	5	Integer between 2 and 99

Name	*Details*	*Default*	*Values*
	synchronize video during playback.		
Primary scheduler address	Computer name of the primary AV Scheduler. This is applicable only when there are multiple AV schedulers installed.	Primary Scheduler Computer name	Maximum 50 characters. (e.g., EDU-DVCS)
Seconds to delay processing AV schedule by secondary schedulers *(this is used when a primary recording scheduler does not operate and a secondary recording/paging scheduler is used)*	Number of seconds to delay processing scheduled items by the secondary scheduler. Default is 15 seconds. Enter number between 10 and 60.	Default is 15 seconds	Integer between 10 and 60
Show Health Banner in AV Control	Click Yes to display the system health banner.	Default is No	Yes, No
HTTP port used by SIMULATIONiQ Enterprise WCF Service. These services are used by inter-process communication between AV applications *(this is the port used to communicate between EMS services)*	HTTP port used by WCF Service for inter-process communication between AV applications.	Default is 8000	Integer between 1 and 9999

AV Streaming

Name		*Default*	*Values*
IP address or computer name of Windows Media streaming server	Internal address of IP address (or URL) used by Windows Media Services	255-character text field (validate name)	Depends on client
External IP address or computer name of Windows Media streaming server	External address of IP address (or URL) used by Windows Media Services.	255-character text field (validate name)	Depends on client
Streaming media port	HTTP or RTSP port number used by Windows Media Services for video streaming	2323 (HTTP) or 554 (RTSP)	Integer between 1 and 9999
Streaming media protocol	Streaming protocol used by Windows Media Services.	HTTP	HTTP/RTSP
TCP Port used by HIK Streaming server for both playback and live	HIK Streaming Server TCP Port used for both playback and live video.	556	Integer between 1 and 9999
Primary Streaming Computer	Computer name of the primary streamer. This is applicable only when there are multiple streamer installed.		

Impersonation

Name	*Details*	*Default*	*Values*
Domain name of service or impersonation account	Enter domain name.	N/A	100-character string
Password of service or impersonation account	Enter password.	N/A	100-character string
Username of service or impersonation account	Enter username.	N/A	100-character string

AV – Data Retention

Name	*Details*	*Default*	*Values*
Delete system performance data after so many days	Number of days after which system performance data will be deleted	1 day	Integer between 1 and 30
Delete all information messages after	Number of hours after which information messages will be deleted.	1 hour	Integer between 1 and 72
Delete all warning messages after	Number of days after which all warning messages will be deleted.	7 days	Integer between 1 and 60
Delete all error messages after	Number of days after which all error messages will be deleted.	30 days	Integer between 1 and 60
Keep MP4 files for video synchronization in addition to other converted files	Click **Yes** to keep MP4 files for video synchronization in addition to other converted files	Yes	Yes, No

AV – Features

Name	*Details*	*Default*	*Values*
Allow creating automated paging schedule	Click **Yes** to enable the creation of automated, pre-recorded audio pages to be played during sessions.	Yes	Yes, No
Allow creating automated camera recording schedule	Click **Yes** to enable the creation of automated camera recording during sessions.	Yes	Yes, No
Allow creating automated camera DVD schedule	Click **Yes** to enable the creation of DVD recording during sessions.	Yes	Yes, No

HIK Vision Streaming Server installed and configured for live video	Click **Yes** to enable live streaming using HIK Streaming server for HIK DVRs and IP Cameras.	Yes	Yes, No
HIK Vision Streaming Server installed and configured for video playback	Click **Yes** to enable playback streaming using HIK Streaming server MP4/264 files.	Yes	Yes, No
Convert videos to iPad format	Click **Yes** to convert videos to iPad format.	Yes	Yes, No
Convert videos to Android format	Click **Yes** to convert videos to Android format.	No	Yes, No
Convert videos to Windows Media format	Click **Yes** to convert videos to Windows Media format.	Yes	Yes, No

AV – Logging

Name	*Details*	*Default*	*Values*
Issue disk space warning when free space is below this percentage value	Percentage value at which free disk space warning is issued.	10%	Integer between 5 and 50
Issue disk space error when free space is below this percentage value	Percentage value at which free disk space error is issued.	5%	Integer between 5 and 50
Interval to monitor local system memory and CPU usage	Number of seconds to monitor local system memory and CPU usage.	5 Sec	Integer between 3 and 60

AV – Scheduling/Intervals

Name	*Details*	*Default*	*Values*
Interval to check service status	Number of seconds at which to check status of services.	5 Sec	Integer between 3 and 60
Service restart timeout	Number of seconds to wait for a service to come online from the time when start command is issued.	30 Sec	Integer between 15 and 120
Minutes to wait before making second attempt to start a service	Number of minutes to wait before making second attempt to start a service.	5 Minutes	Integer between 1 and 60
Minutes to wait before making third attempt to start a service	Number of minutes to wait before making third attempt to start a service.	60 Minutes	Integer between 2 and 120 Validate that this interval is more than the “Minutes to wait before making second attempt to start a service” parameter.

Hours to wait before making an attempt to start a service after third attempt	Number of hours to wait before making an attempt to start a service after third attempt.	12 Hours	Integer between 1 and 23 Validate that this value is not less than the "Minutes to wait before making third attempt to start a service" parameter.
Recording schedule reload interval	Number of seconds to reload the recording schedule.	5 Sec	Integer between 3 and 60
Paging and DVD schedule reload interval	Number of seconds to reload the paging and DVD schedule.	5 Sec	Integer between 3 and 60
Interval to monitor local disk space	Number of seconds to check disk space of all computers where services are installed.	10 Sec	Integer between 3 and 60
Pending start, stop or paging schedule items will be marked as expired after this time	Number of minutes after which Pending start, stop or paging schedule items will be marked as expired.	2 Min	Integer between 1 and 10

Evaluation

Name	*Details*	*Default*	*Values*
Hide case/scenario and SP information from learner view of an encounter video *(In a session, each rotation has an encounter.)*	Click **Yes** to hide case and SP information in student view of an encounter video.	No	Yes or No
Number of days to display To Do list items on the dashboard	A given date or a number of days, or -1 for everything	10	Numeric
Show abbreviations during SOAP Note evaluation	Click Yes to enable abbreviations.	Yes	Yes or No
Allow learners to submit an incomplete Pre-Encounter checklist	Click **Yes** to warn learners before submitting an incomplete pre-Encounter checklist. Click **No** to not allow learners to submit partial pre-encounter checklist, but the responses will be saved in the database	No	Yes or No
Allow learners to submit an incomplete Post-Encounter checklist	Click **Yes** to warn learners before submitting an incomplete post-Encounter checklist. Click **No** to not allow learners to submit partial post-encounter checklist, but the responses	No	Yes or No

Name	*Details*	*Default*	*Values*
	will be saved in the database		
Maximum number of characters to display in multi-line learner response text box fields	Enter number between 0 and 8000.	8000	0 to 8000
Show character limit counter on multi-line learner response text box fields	Click **Yes** to display the character limit counter on multi-line learner response text box fields. **Note:** If Yes is selected, you may experience difficulties when typing a Patient Note, such as issues with inserting text and text wrapping.	No	Yes or No
When set to yes, the evaluation will have timer enabled and enforced	Click **Yes** to enable timer on evaluation.	Yes	Yes or No
Hide learner picture during evaluation	Click **Yes** to hide learner picture from evaluators during evaluation. This does not affect checklist scoring.	Yes	Yes or No
Hide learner name during evaluation	Click **Yes** to hide learner name from evaluators during evaluation (this displays the learner ID from the user's profile in the session blueprint and not the learner ID from the database). This does not affect checklist scoring.	No	Yes or No
Hide learner picture before evaluation	Click **Yes** to hide learner picture before evaluation.	No	Yes or No
Show start/stop recording options for learners *(this enables learners to record)*	Click **Yes** to show start/stop recording options for learners.	No	Yes or No
Show start/stop recording options for SP *(this enables SPs to record)*	Click **Yes** to show start/stop recording options for SPs.	No	Yes or No
Allow SPs and educators to submit an incomplete checklist	Click **Yes** to warn SPs and educators before submitting an incomplete checklist. Click **No** to not allow SPs and educators to submit partial checklist, but the responses will be saved in the database.	No	Yes or No
Missing responses on incomplete checklists can only be changed if the previous parameter is set to Yes	Click **Yes** to allow missing responses on a partially submitted checklist to be changed only when Allow SPs and educators to	No	Yes or No

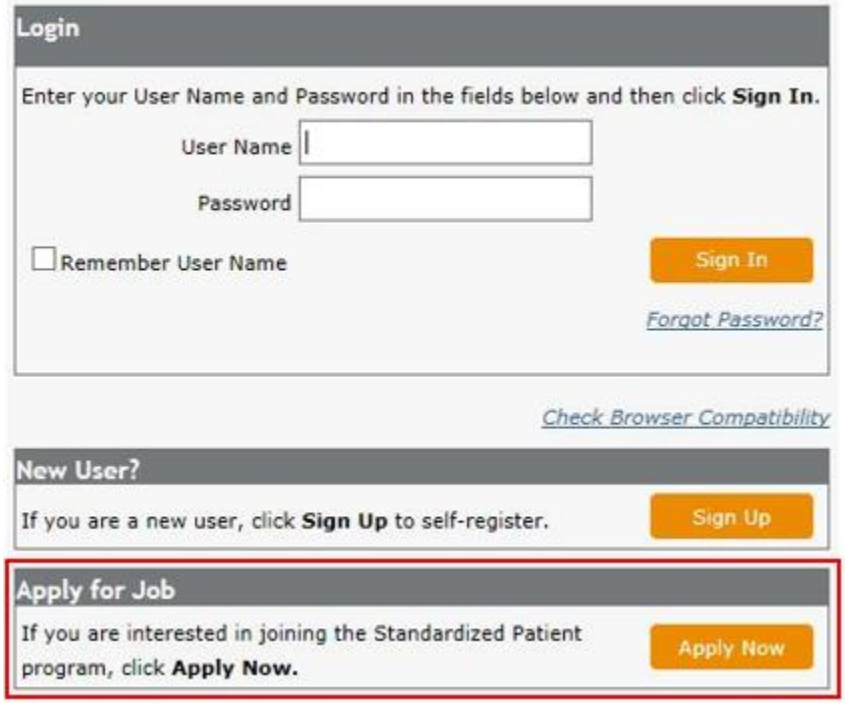
Name	*Details*	*Default*	*Values*
	submit an incomplete checklist is set to **Yes**.		
Allow SP to self-assign to session from the Evaluation computers *(for Cases, Scenarios, or Sessions)*	Click **Yes** to allow SPs to self-assign to a session from the evaluation computers.	No	Yes or No
Allow learners to self-register to session from the Evaluation computers and the system will define the rotation *(for Cases, Scenarios, or Sessions)*	Click **Yes** to allow learners to self-register to session from the evauation computers and the system will define the rotation.	No	Yes or No
Hide Checklist Comments box for Learners	Click **Yes** to hide the comment boxes for the learner comments.	No	Yes or No
Hide Checklist Comments box for Evaluators	Click **Yes** to hide the comment boxes for the evaluator comments.	No	Yes or No
Allow Simple Session assessment on Dashboard	Click **Yes** allow the simple session assessment on the dashboard	No	Yes or No
Allow Post encounter scoring on Dashboard	Click **Yes** to allow the Post encounter to be scored from the dashboard.	No	Yes or No
Hide Quick Access Links on pre-encounter and post-encounter evaluations	Click **Yes** to hide the Quick Access links appearing on the right column of the evaluation	No	Yes or No

Scoring and Reporting

Name	*Details*	*Default*	*Values*
Calculate scores and statistics up to the number of decimals defined. Valid values 0 to 4	Enter the number of decimals up to which scores and statistics should be calculated.	Integer of 2	0 to 4
Number of decimals to display in score and statistical reports. Valid values 0 to 2. Exception: 4 decimals for point-bi-serial, kappa and alpha reports	Enter the number of decimals to display in score and statistical reports. Valid values are 0 to 2. **Exception:** 4 decimals for point-bi-serial, kappa and alpha reports.	Integer of 2	0 to 2

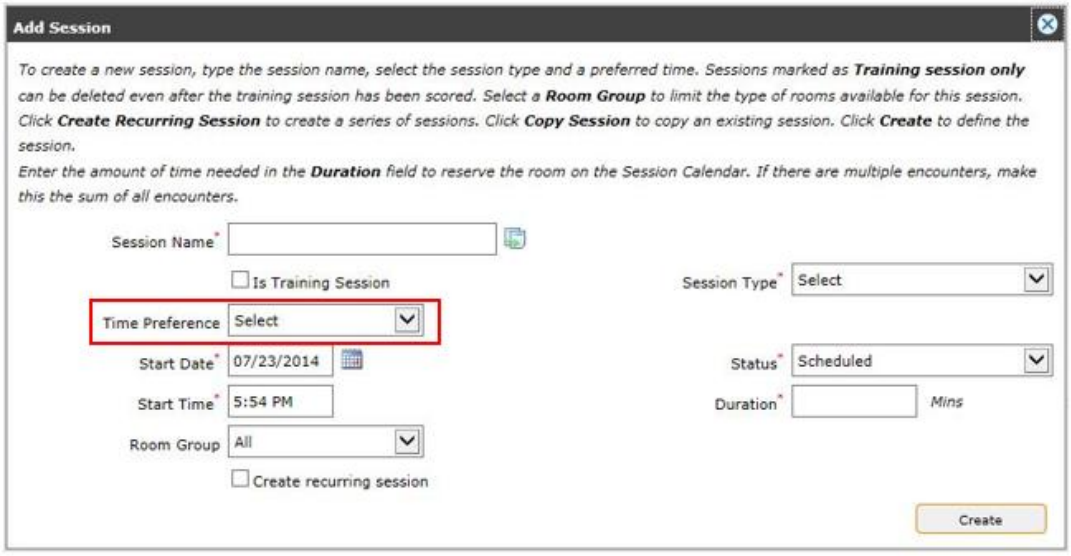
The following is an example of parameter-based functionality:

1) Show **Apply for a Job** link from the application home page for SP to apply for a job.

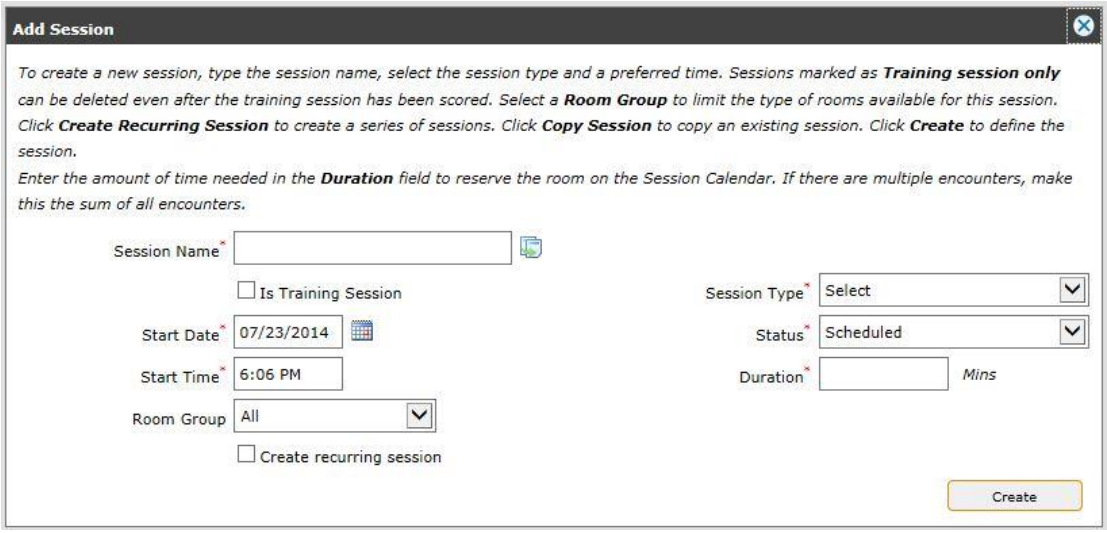


2) Scheduling Time Preference Parameter

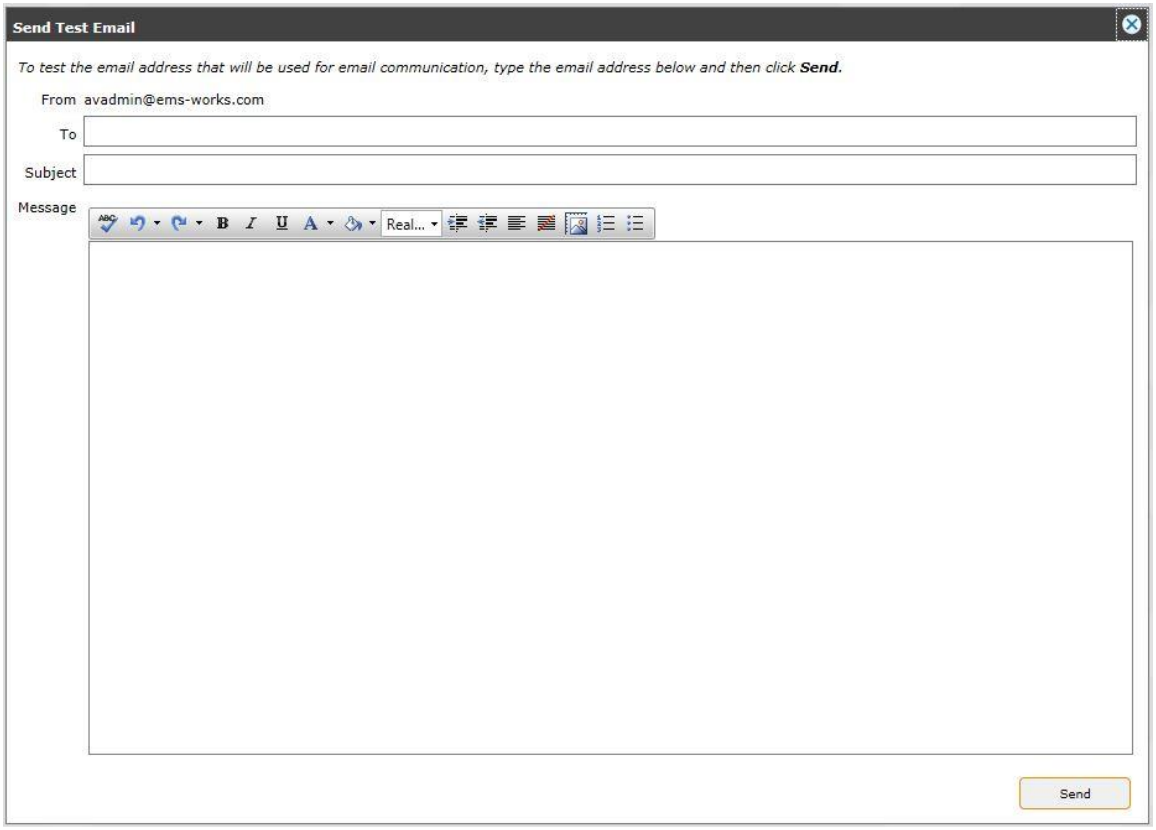
a. Set to Yes



b. Set to No

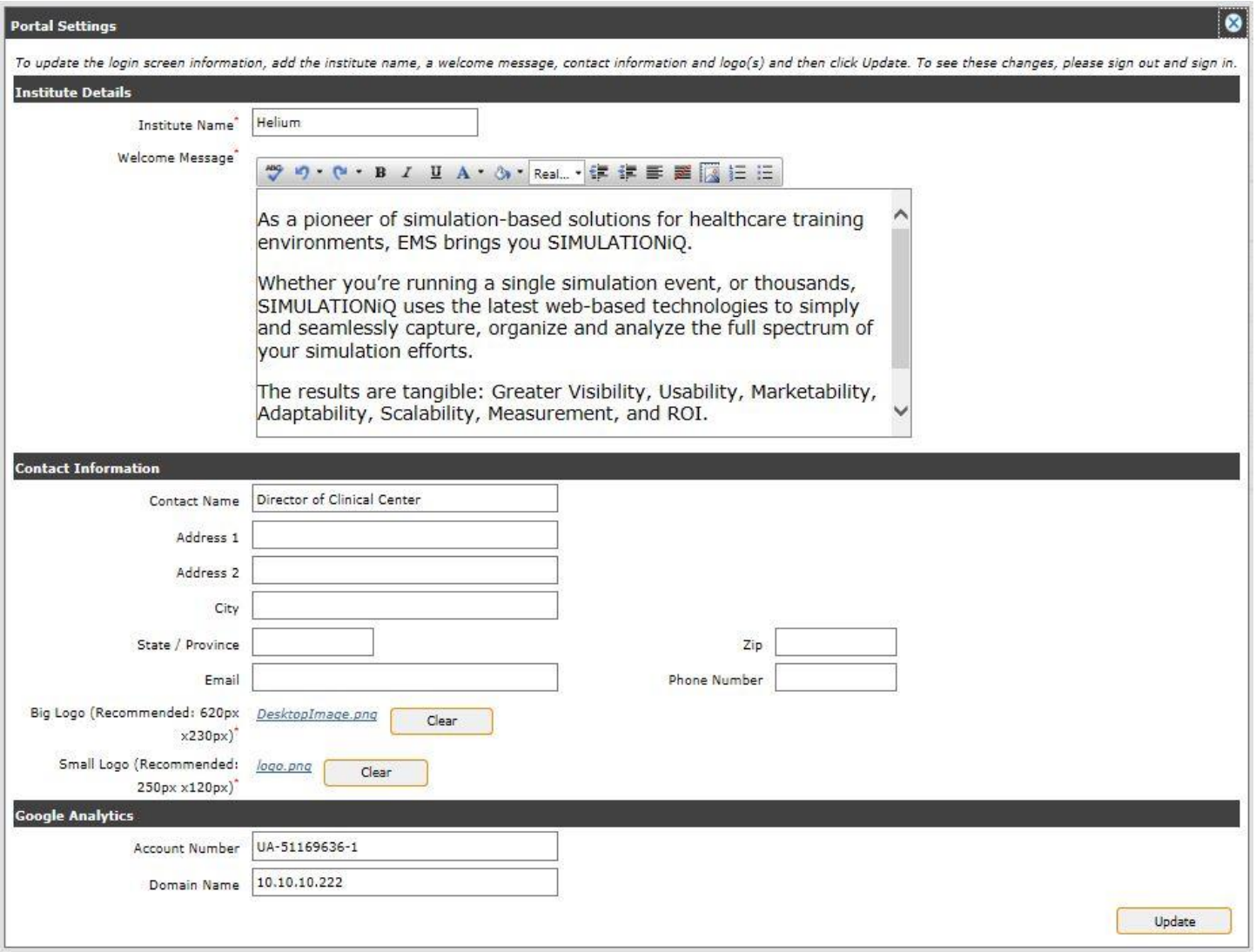


3) Test Email Using the Address When Sending Emails From the Service Application



Portal Settings

Click Portal Settings from the **Explore** tab; the following dialog appears:



The following fields appear:

<u>Institute Details</u>

Field	Description
Institute Name*	Enter the name of your institute.
Welcome Message*	Enter a welcome message.
*-required field	

Contact Information

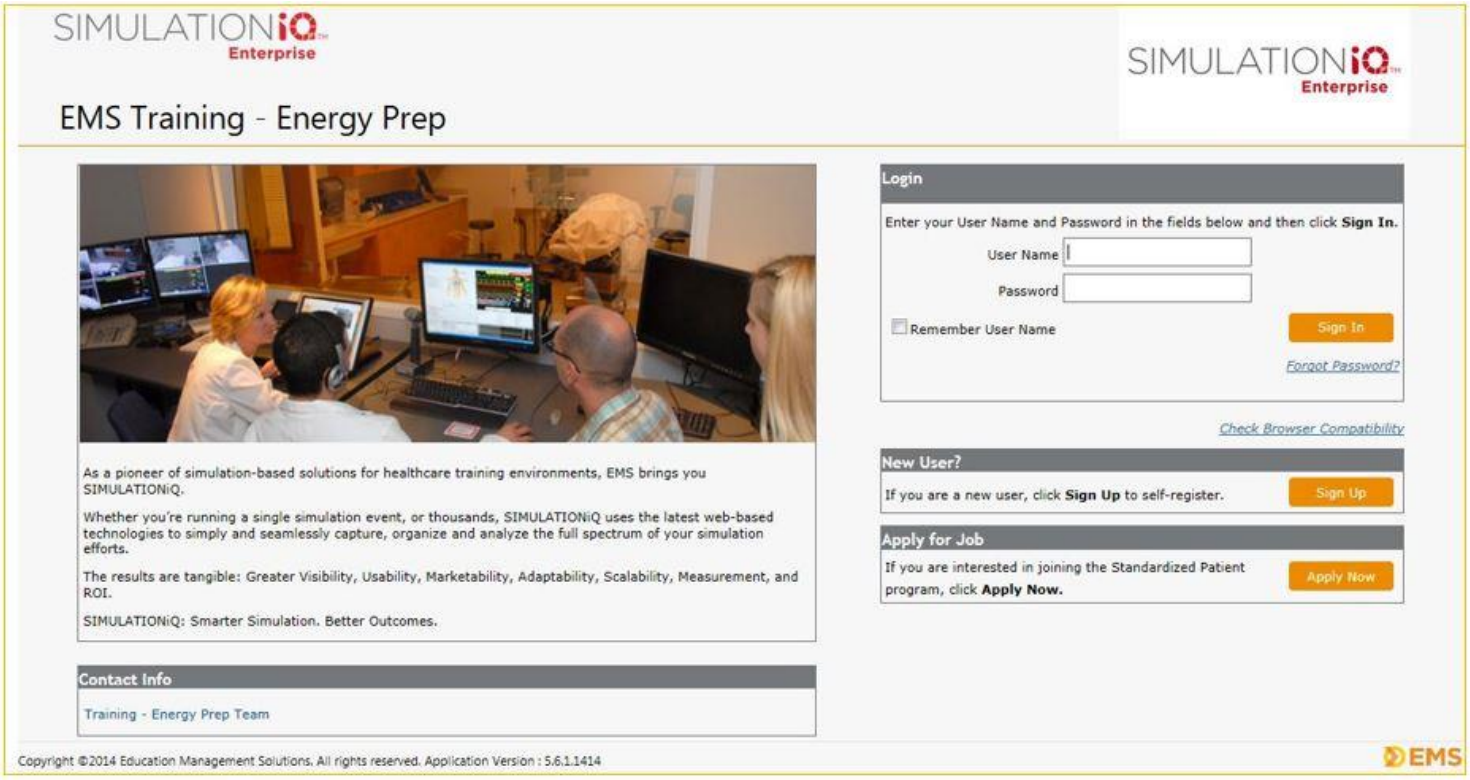
Field	Description
Contact Name	Enter the name or title of the person or name of the institution for contact purposes.
Address 1	Enter the address of the contact (line 1).
Address 2	Enter the address of the contact (line 2 if applicable).
City	Enter the city of the contact.
State/Province	Enter the state or province of the contact.
Zip	Enter the zip code of the contact
Email	Enter the Email address of the contact.
Phone Number	Enter the phone number of the contact.
Big Logo*	Enter the name of the big logo appearing overtop the welcome text on the portal page (supports .bmp,.gif, .jpg, .png, and .tif formats).
Small Logo*	Enter the name of the small logo appearing overtop the login on the portal page (supports .bmp,.gif, .jpg, .png, and .tif formats).
*-required field	

Google Analytics

Field	Description
Account Number	Add your Google Analytics account ID.
Domain Name	Add the URL of your SIMULATIONiQ™ Enterprise web application.
*-required field	

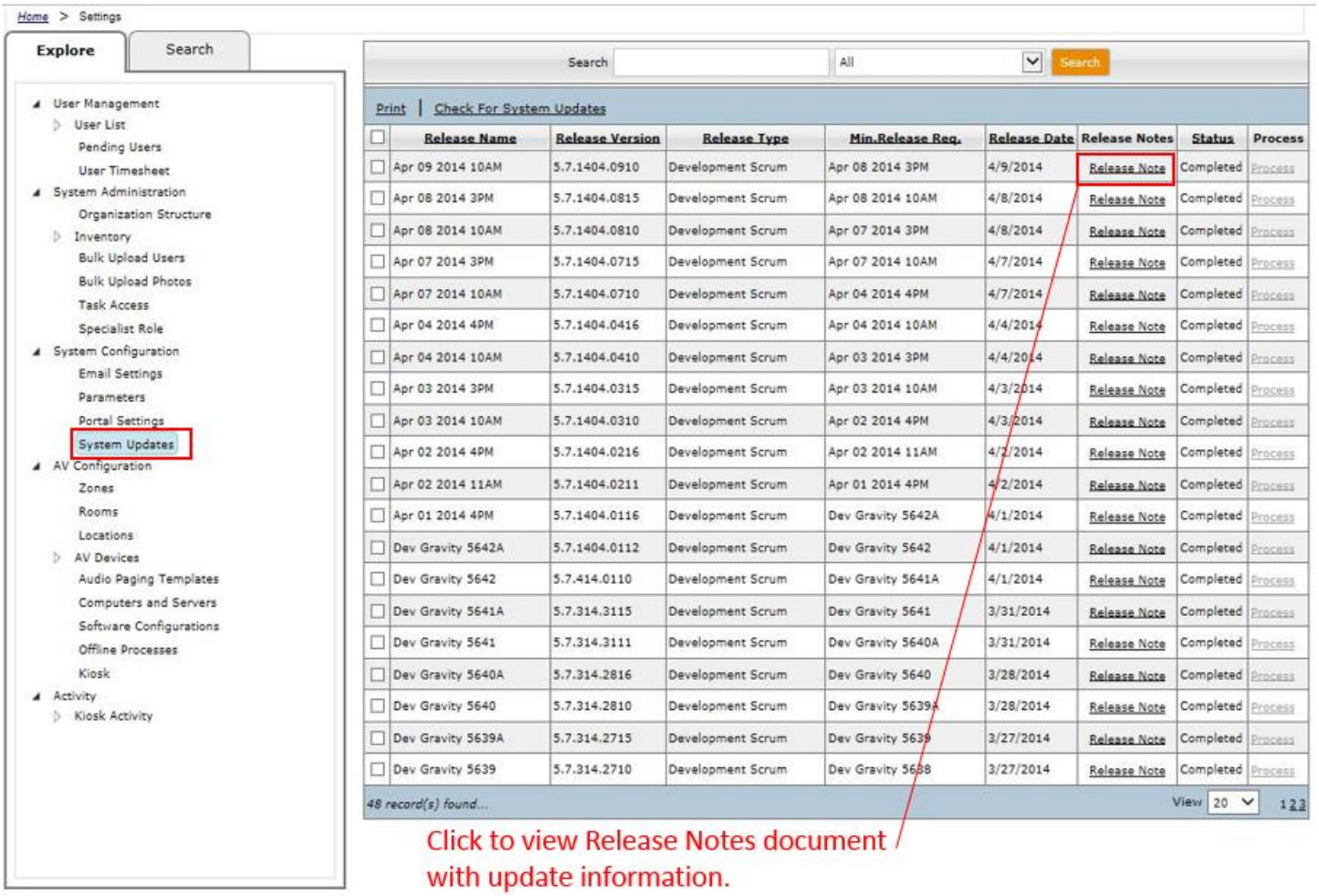
For more information on Google Analytics, please consult Appendix B.

Click **Update** after entering your portal settings; your SIMULATIONiQ Enterprise portal page configuration will appear the next time you log onto the application (a sample appears below).



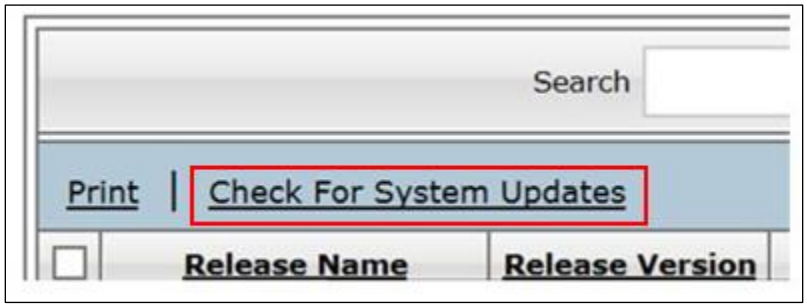
System Updates

Click System Updates from the **Explore** tab; the following dialog appears:

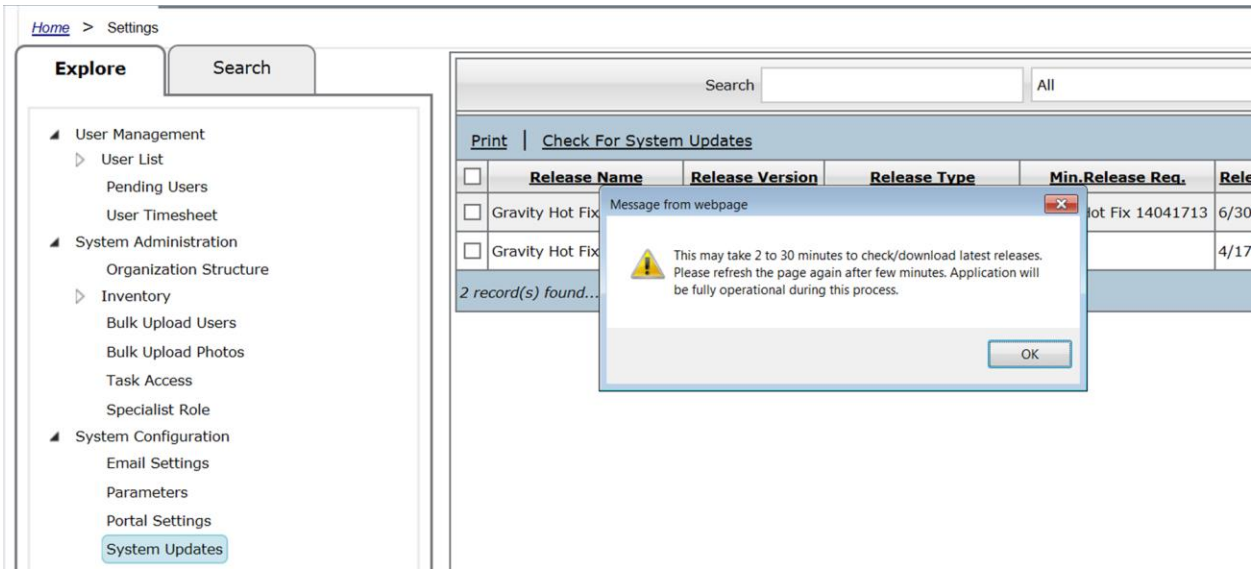


This section displays available and processed system updates, along with Release Notes to define the update, and enables the Administrator to run updates as they become available.

On the right side of the screen, click the **Check for System Updates** link.



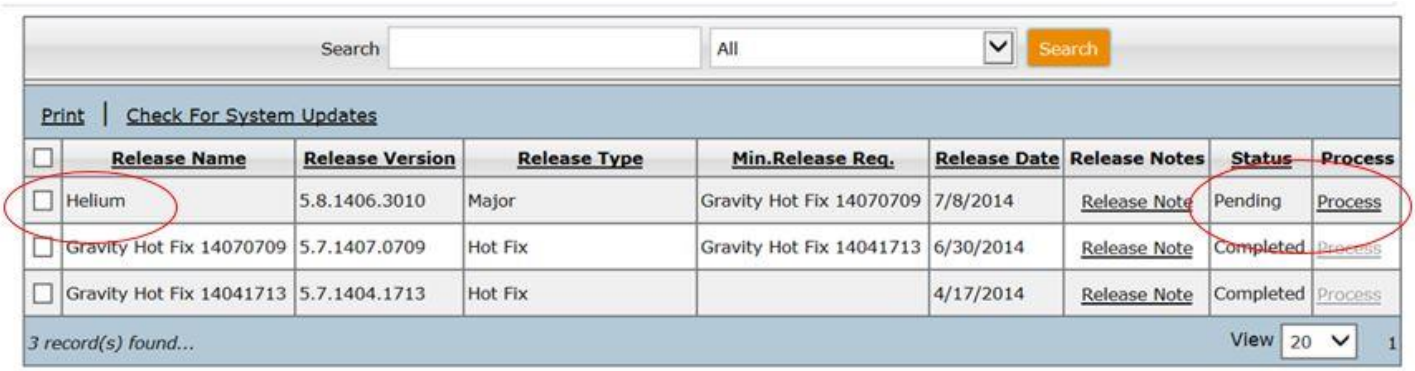
A pop-up appears to indicate that the system is checking to see if updates are available.



***Note*:** *It may not be apparent that the download is occurring. When the download of the update completes, it will appear above the previously installed updates. The system also runs a check for pre-requisites prior to downloading a system update.*

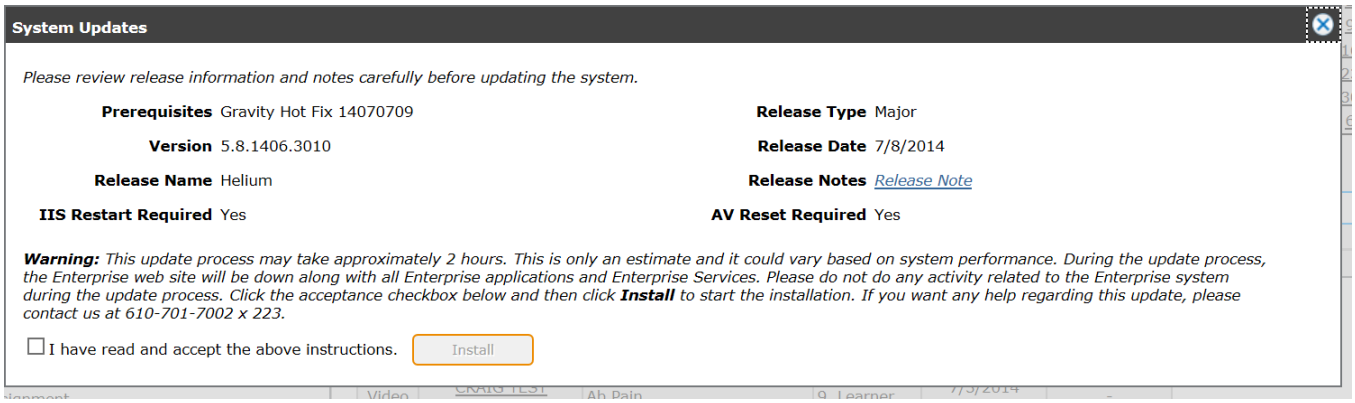
Once this process finishes, any updates ready to be processed will appear at the top of the list with a link to start the process. You can process the update from either the **Settings** task group, or the **Dashboard** (see the following screen shots in this section).

Settings Task Group View

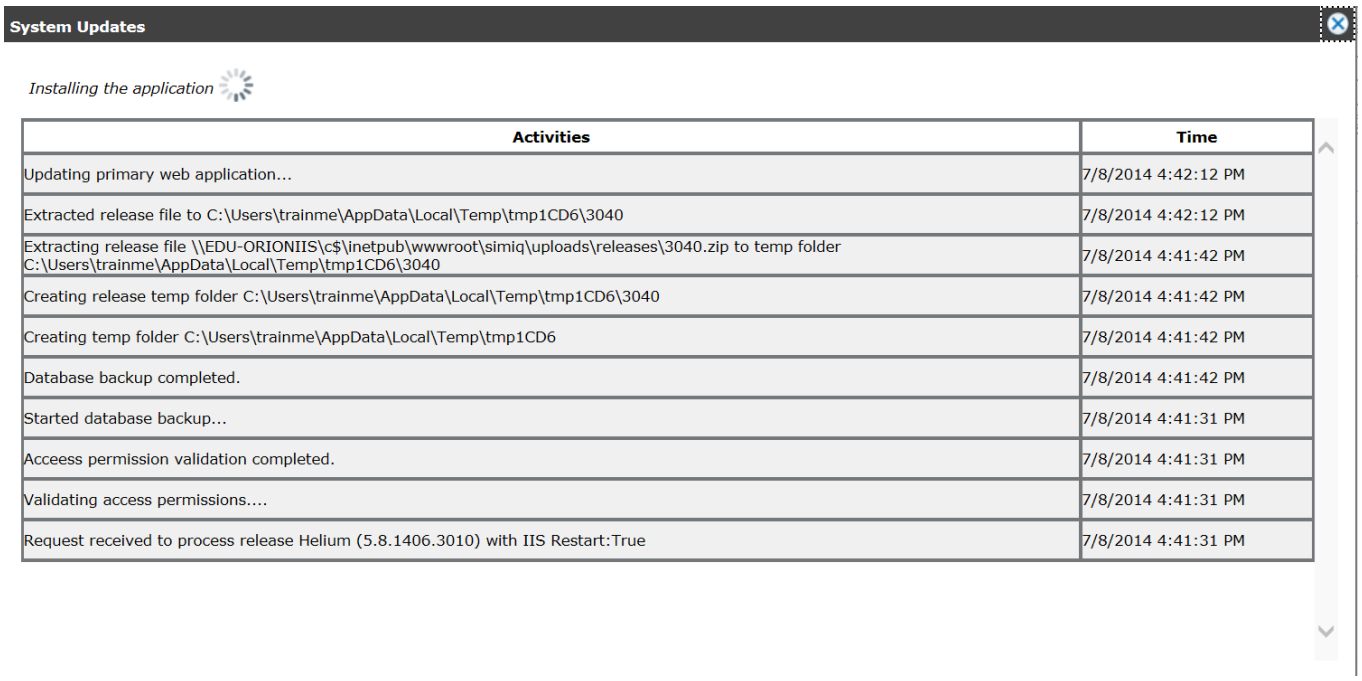


Dashboard View

When the Process link is clicked, a pop-up appears explaining what will be installed, and a link to the release notes is made available.



Click the **I have read and accept the above instructions** checkbox and then click the **Install** button to install the update. A pop-up appears showing the progress of the installation.



Activities	Time
Updating primary web application...	7/8/2014 4:42:12 PM
Extracted release file to C:\Users\trainme\AppData\Local\Temp\tmp1CD6\3040	7/8/2014 4:42:12 PM
Extracting release file \\EDU-ORIONIIS\c$\inetpub\wwwroot\simiq\uploads\releases\3040.zip to temp folder C:\Users\trainme\AppData\Local\Temp\tmp1CD6\3040	7/8/2014 4:41:42 PM
Creating release temp folder C:\Users\trainme\AppData\Local\Temp\tmp1CD6\3040	7/8/2014 4:41:42 PM
Creating temp folder C:\Users\trainme\AppData\Local\Temp\tmp1CD6	7/8/2014 4:41:42 PM
Database backup completed.	7/8/2014 4:41:42 PM
Started database backup...	7/8/2014 4:41:31 PM
Acceess permission validation completed.	7/8/2014 4:41:31 PM
Validating access permissions....	7/8/2014 4:41:31 PM
Request received to process release Helium (5.8.1406.3010) with IIS Restart:True	7/8/2014 4:41:31 PM

When the update is complete, the system will automatically log you out. Once you log in to the system again, the **System Updates** screen shows the update status as **Completed** and the Process link is greyed-out.

Print | Check For System Updates

	Release Name	Release Version	Release Type	Min.Release Req.	Release Date	Release Notes	Status	Process
	Dev Gravity 5639A	5.7.314.2715	Development Scrum	Dev Gravity 5639	3/27/2014	Release Note	Completed	Process
	Dev Gravity 5639	5.7.314.2710	Development Scrum	Dev Gravity 5638	3/27/2014	Release Note	Completed	Process
	Dev Gravity 5638	5.7.314.2612	Development Scrum	Dev Gravity 5637A	3/26/2014	Release Note	Completed	Process

3 record(s) found... View 20 1 2

Note: The system checks for prerequisites prior to the installation of any update.

AV Configuration

The sections AV Devices, Computers and Servers, Software Configurations, Offline Processes and Kiosk will be automatically populated as part of your configuration and will be “read only” information.

Zones

WARNING: Making changes to Room Zone settings without consulting EMS Client Support may result in undesirable behavior.

Zones are used to group rooms either by functionality (SIM rooms, SP rooms, floor layout, etc.) or by paging zones (rooms where the paging announcement will play). Grouping rooms into zones is helpful when selecting a room on a Session Activity page because it will filter the list of rooms by that zone. Grouping rooms into zones is also helpful in AV Control, where selecting the Zone drop-down menu will display that particular floor plan (the AV Control Layout checkbox needs to be checked in the Zone Details window for this to occur).

A Paging zone is created depending on the type of paging announcements that you want to play within your institution. For example, there might be announcements you want to play everywhere, so that all participants are aware of the progression of a session (this could be one type of zone) or there might be announcements that are to be played only in patient rooms (this could be another type of zone). In order for a room to be part of a paging zone, it must be equipped with speakers and configured hardware.)

Click Zones from the **Explore** tab; the following grid appears:

Add New

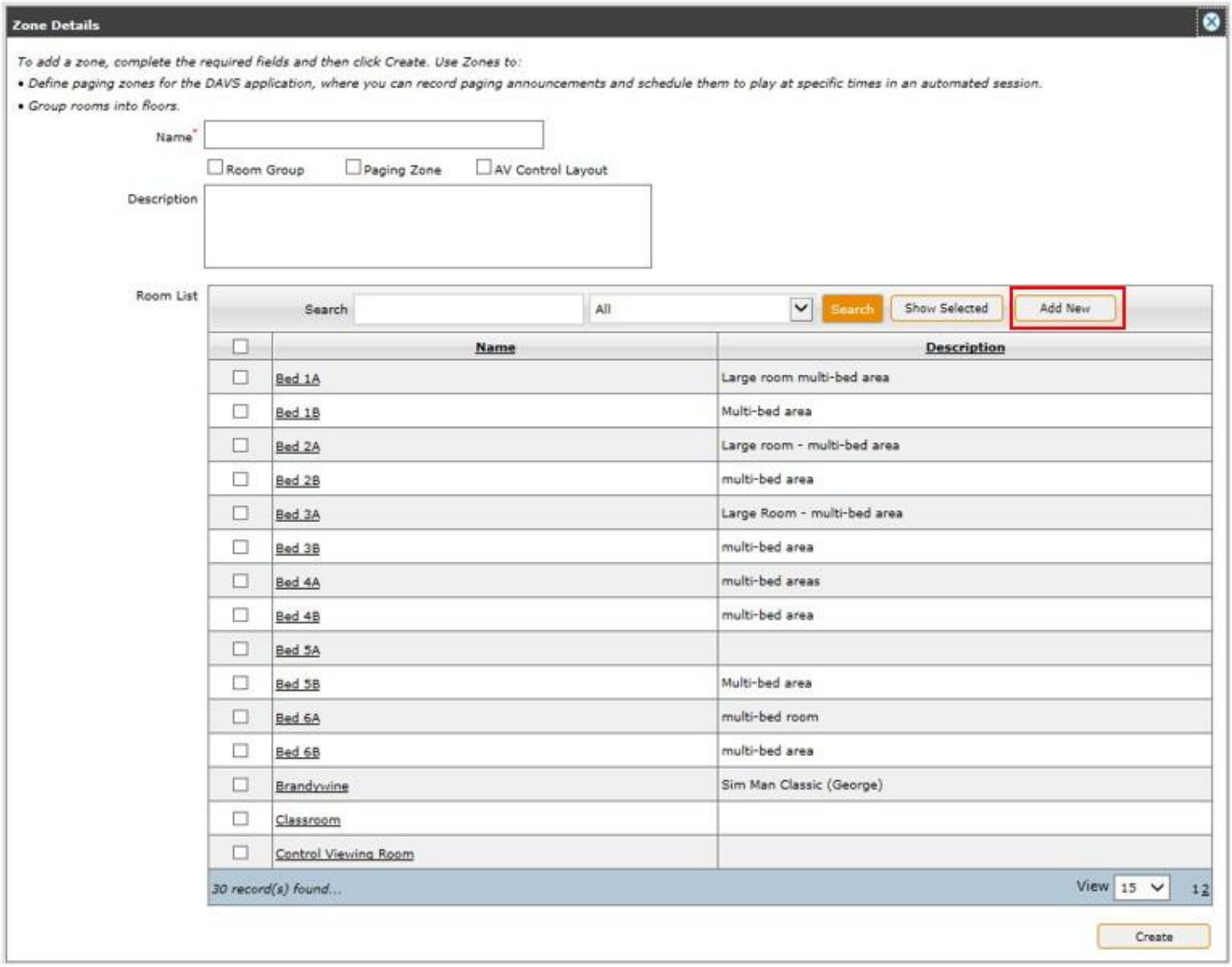
Search | All | Search

Print | Change Status | Delete

	Name	Description	Rooms	Status	Delete
	All		Debrief, Room 1, Room 2, Room 3, Room 4, Room 5, Room 6, Room 7	Active	
	ALL Sim Rooms		Room 10, Room 6, Room 7, Room 8, Room 9	Active	
	ALL SP Rooms		Room 1, Room 2, Room 3, Room 4, Room 5	Active	
	Brandywine Paging	Paging in only Brandywine Room	Brandywine, Room 1, Room 2	Active	
	EMS		Brandywine, VF Training Rm	Active	
	Large Multi-bed area		Bed 1A, Bed 1B, Bed 2A, Bed 2B, Bed 3A, Bed 3B, Bed 4A, Bed 4B, Bed 5A, Bed 5B, Bed 6A, Bed 6B	Active	
	OSCE Zones	To cfg OSCE		Active	
	Page Zone (Bran & Velly)	Page (Brnadywine & Valley)	Brandywine, VF Training Rm	Active	
	Paging Zone for both rooms		Brandywine, VF Training Rm	Active	
	Portable		UNIT01	Active	
	Room 6 Cases	Bariatric Asthma Post Surg	Room 6	Active	
	Simulator Storage		Room 4	Active	
	SP Rooms	Use when scheduling both SP rooms at the same time	Room 2, Room 3	Active	
	Twilight Zone	do not atempt to adjust your set	Room 1, Room 10, Room 2, Room 3, Room 4, Room 5, Room 6, Room 7, Room 8, Room 9	Active	
	Valley Forge Paging	Paging only in Valley Forge Training Room	Room 3, Room 4, Room 5, VF Training Rm	Active	

15 record(s) found... View 1 1

Click **Add New** to call up the following to enter a new zone:



Enter the following information:

Field	Description
Name*	Enter the name of the new zone; also: • Click the **Room Group** checkbox if you want to include the room in a room group (rooms can be grouped by similarity, i.e., Sim rooms, patient rooms, or by geographic areas). • Click the **Paging Zone** checkbox if a paging template will be assigned to this zone. • Click the **AV Control Layout** checkbox to enable AV Control functionality for this zone.
Description	Enter a description of the zone in the text field.

Field	Description
Room List	Select a room from the list of those available at the grid by clicking the checkbox.
*-required field	

Enter grid search criteria and click the **Show Selected** checkbox to sort room information based on search criteria. Click the **Add New** button highlighted in red to call up a dialog to enter new room information (this functionality is explained in the Rooms topic that follows).

Click **Create** to save all Zone Details entered at this dialog.

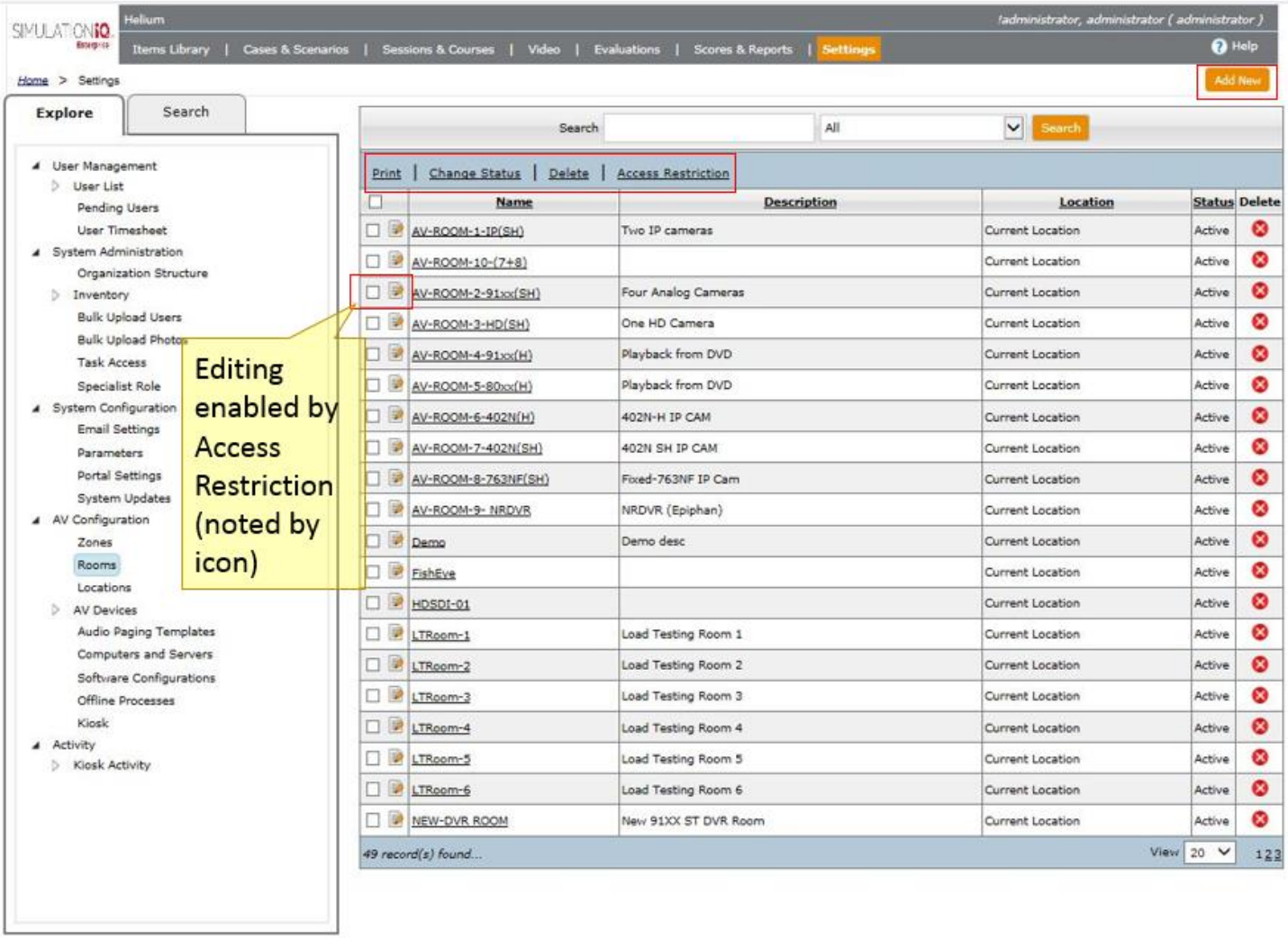
Rooms

WARNING: Making changes to Room settings without consulting EMS Client Support may result in undesirable behavior.

Within SIMULATIONiQ Enterprise, you can configure a room for different purposes as part of a learning encounter or session. A room can be added even if it does not have cameras or paging announcement speakers; this way, it can be scheduled for meetings or other non-recorded events.

A room equipped with cameras can be used to record an SP encounter or a simulation scenario; it can also be used for post-encounter debriefing activities. A room can also be set up to play messages to learners indicating various session activities (if it is part of a zone).

Click Rooms from the **Explore** tab; the following grid appears:

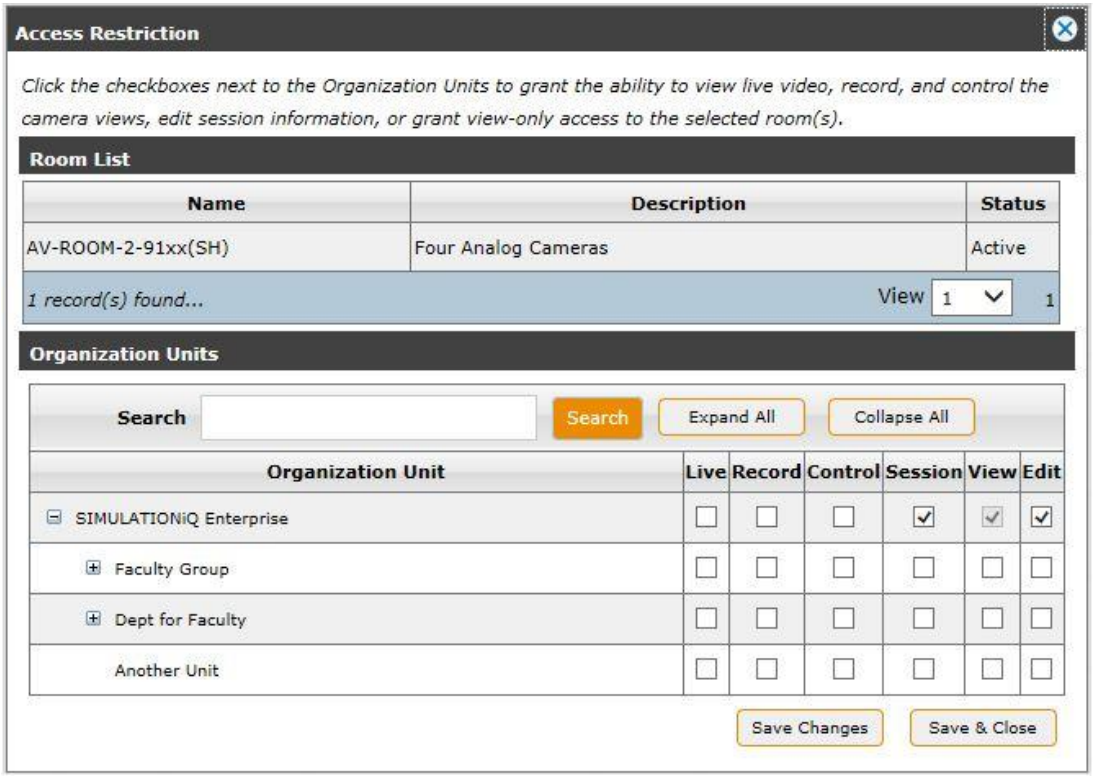


Note: The icon next to the room indicates that access restrictions have been enabled.

The following functionality is available from the Landing Page grid:

- **Print** – Click the checkbox next to a selection and click **Print** to generate a list of selected grid details.
- **Change Status** – Click the checkbox and click **Change Status** to change the room status (**Active** and **Retired** are the selections).
- **Delete** – Click the checkbox and click **Delete** to remove the room selection.
- **Access Restriction** – Click the checkbox for one or more rooms to view any access restrictions that apply; this functionality is enabled by selecting Yes at the "Enable User Access Security" parameter in Settings and then selecting whether or not access is Public, by Organization Unit, or Author-Only (this is set up by your Enterprise Support Administrator – this functionality is new as of the Helium release).

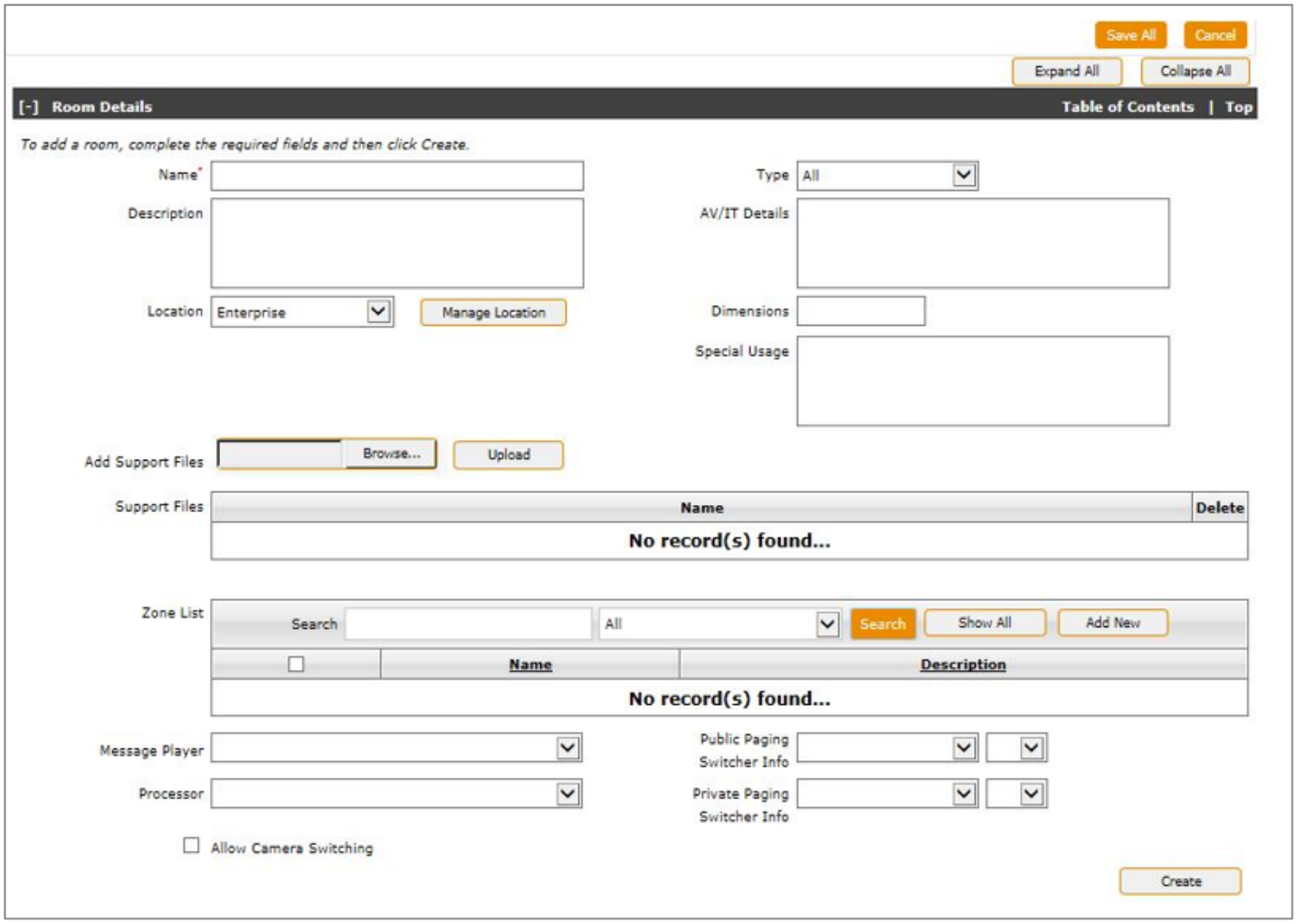
The following sample dialog appears:



The following checkbox selections appear:

Checkbox	Selection
Live	Click the checkbox to enable live viewing.
Record	Click the checkbox to enable live recording
Control	Click the checkbox to enable session indexing and recording through AV Control.
Session	Click this checkbox to schedule a session in this room.
View	Click this checkbox to view room settings information.
Edit	Click this checkbox to edit room settings information.

Click **Add New** from the button in the upper right corner of the Room Landing Page; the Room Activity Page appears showing the following:



Enter the following information:

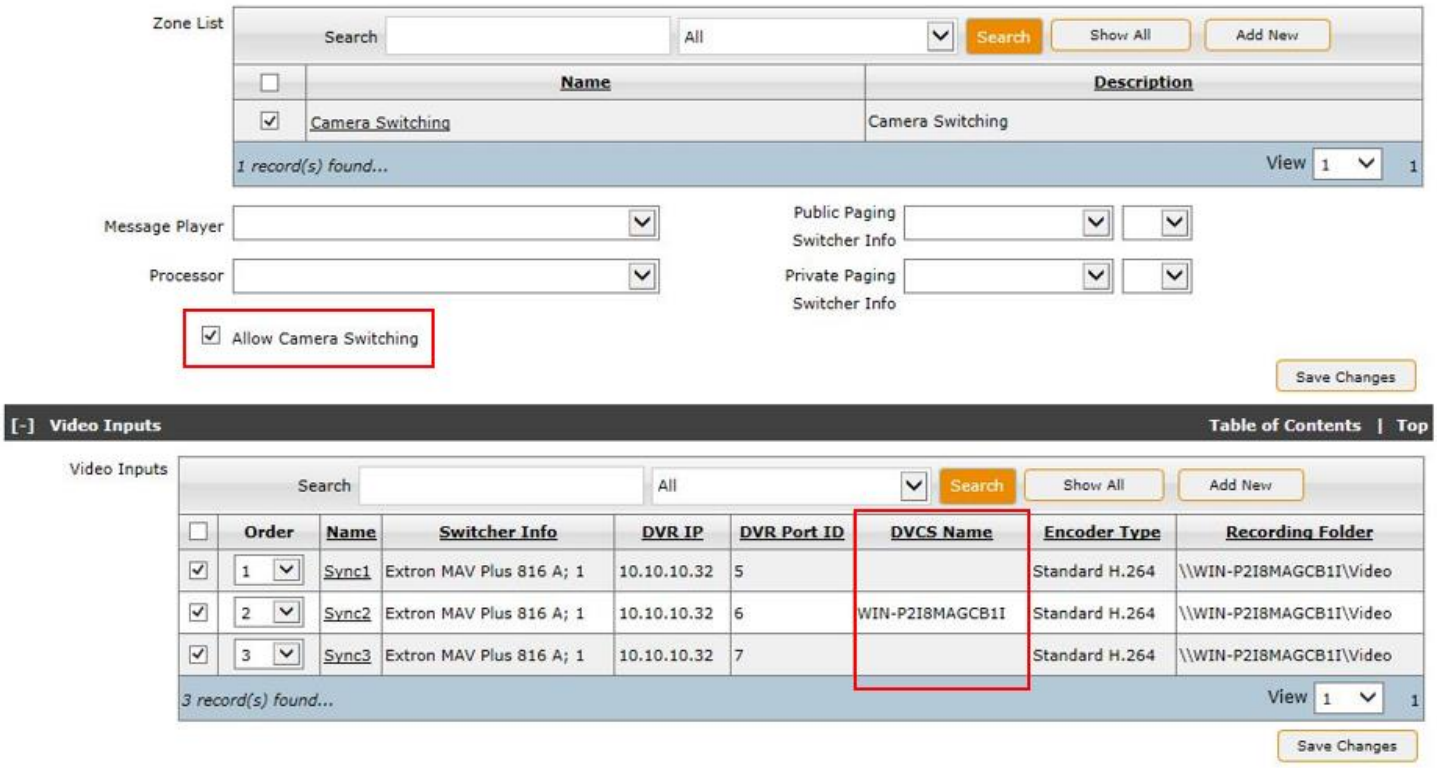
<u>Room Details</u>

Field	Description
Name*	Enter the name and/or room number.
Description	Enter a description to identify the room for training purposes, such as trauma center, neonatal care, medical/surgical care, etc.
Location	Enter the secondary location to run a secondary unit (e.g., SIM One HD), as opposed to the primary location running the primary unit (e.g., SIMULATIONiQ Enterprise). **Note**: Any location added by clicking the Manage Location button should be a secondary location (e.g., for another

Field	Description
	simulator); the primary unit is installed by EMS upon initial site configuration.
Type	Select the room training type default from the drop-down list.
AV/IT Details	Enter particular AV/IT details about the room (such as “Used for Web Video”).
Dimensions	Enter the room dimensions.
Special Usage	Enter any special usage considerations for the room.
Add Support Files	Add a support file by browsing on your network sand clicking Upload (e.g., a room floor diagram).
Support Files	Any support files added for the room appear in this grid.
Zone List	Search for the zone within the grid by entering a text search, selecting All, Name or Description as search criteria; click **Show All** to show all zones that include this room (to add the room to a zone, click **Add New** and enter the details of the new zone – this defines the area where a paging announcement is to be played).
Message Player	Click the drop-down list to view all available MacFi recorders; select one to use for your room.
Processor	Use this to configure your Crestron unit for room for audio paging. You can add the processor from Settings>AV Devices>Processor Controls.
Public Paging Switcher Info	Select the public paging switcher from the drop-down list; this is based on the AV Device configuration for your room setup as part of installation (this enables paging within zones).
Private Paging Switcher Info	Select the private paging switcher from the drop-down list; this is based on the AV Device configuration for your room setup as part of installation (this enables paging within a room in a zone).
Allow Camera Switching	Click this checkbox to allow a camera to be used in multiple rooms. **Note**: A camera may be mapped to more than one room in SIMULATIONiQ - BUT it may be mapped to ONLY TWO rooms at any one time.
*- required field	

Click **Create** when you have finished entering data at this section (button toggles to **Save Changes** for an existing room).

To enable dynamic camera switching, your room needs to be configured as follows:



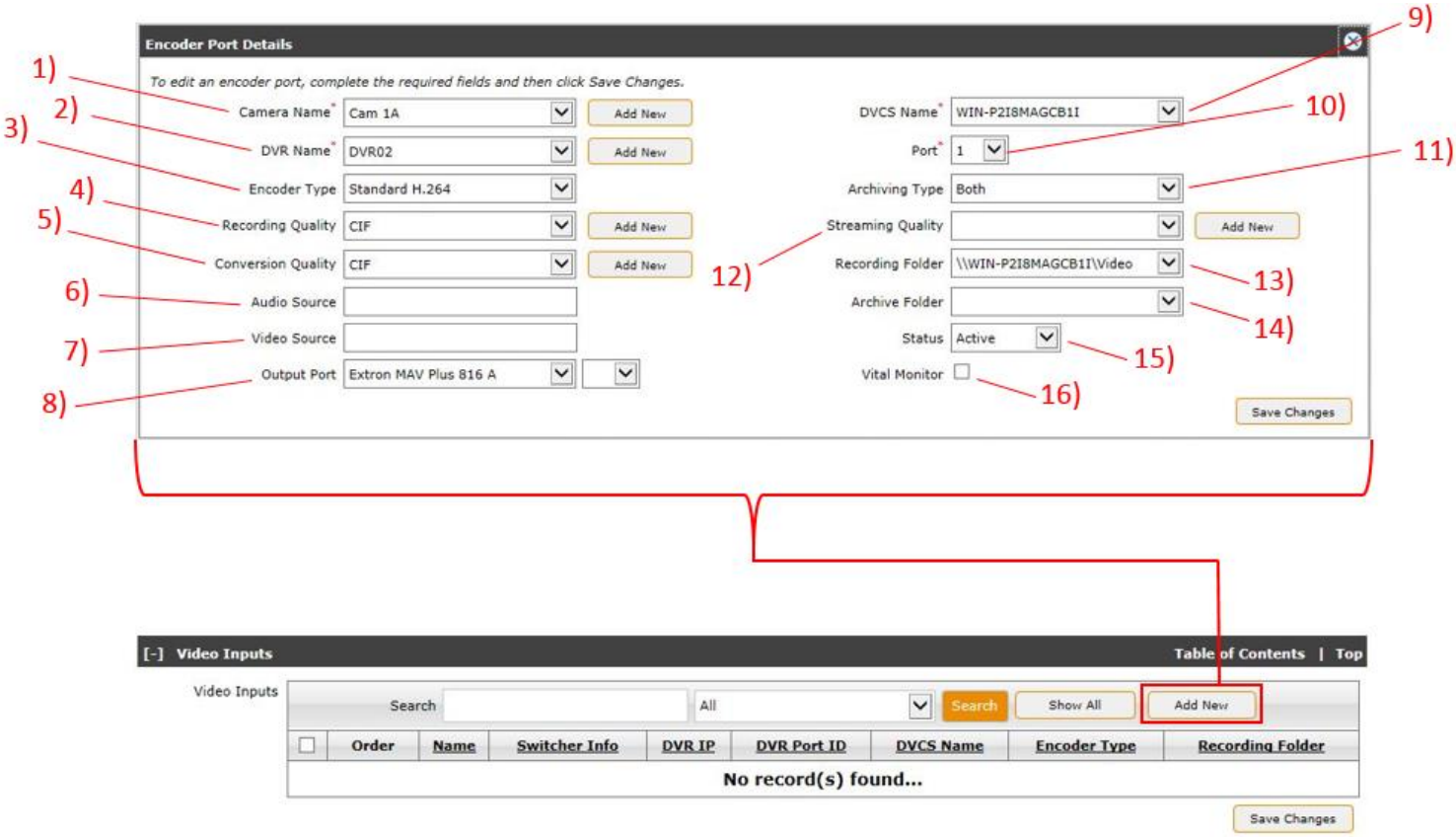
As shown in the example, the **Allow Camera Switching checkbox** is checked. Also, no more than one DVCS must be included in your configuration (e.g., in the above example, cameras Sync1 and Sync3 are not associated with a DVCS, but camera Sync2 is associated).

Note: A zone appears on the zone list as shown above, but it is not necessary to create a zone for camera switching.

Video Inputs

Note: Please do not change any video input settings without consulting EMS Client Support.

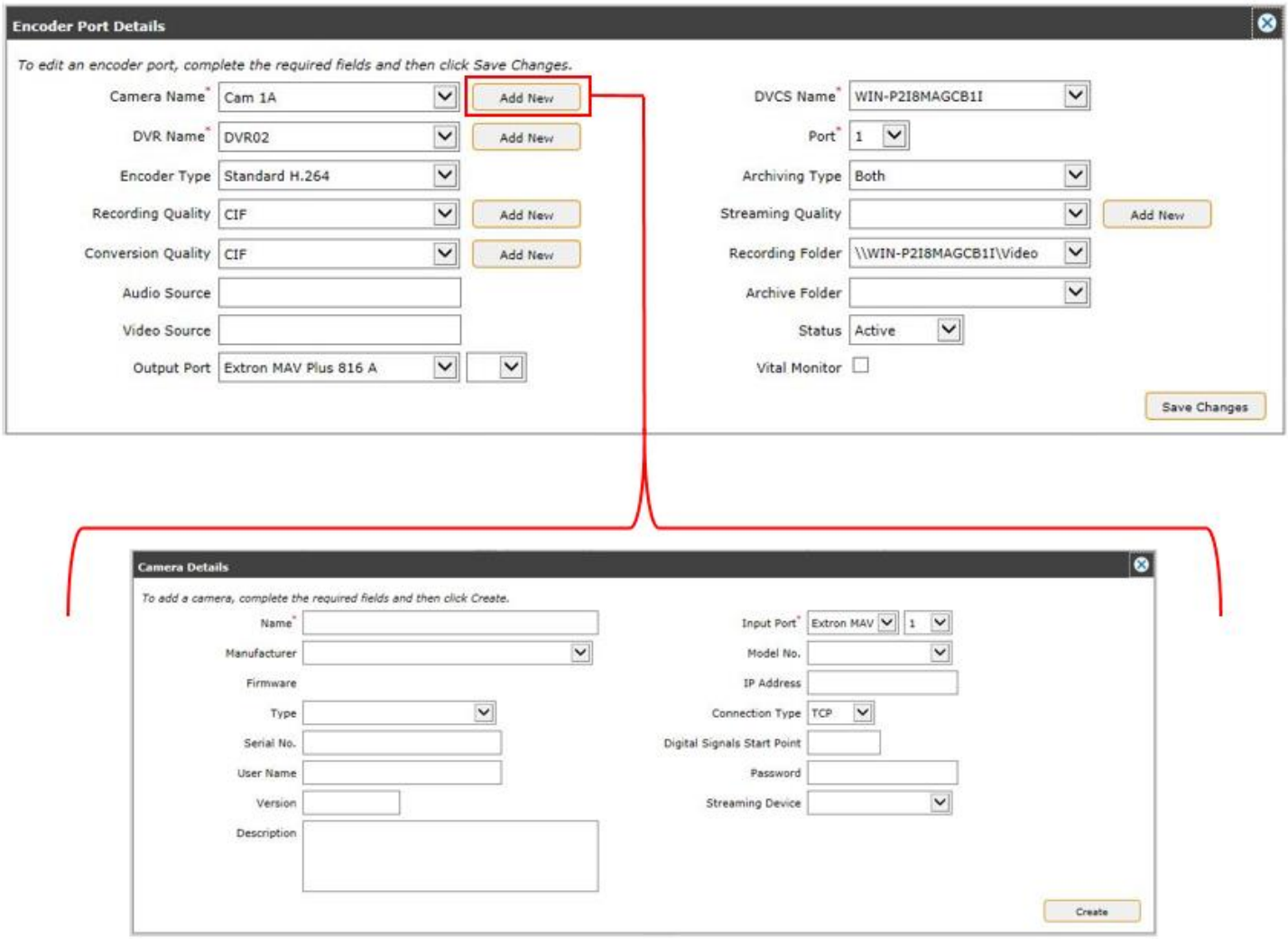
Search for video input details from the grid selections, or click **Add New** to add a new video input, as follows:



Enter the following information:

	Field	Description
1	**Camera Name***	Enter the name of the camera used to record a process in the simulation or SP session (e.g., vitals sign monitor, patient during assessment, etc.).
*-Required field		

Click the **Add New** button to call up the following dialog:



Note: <u>Please do not change any camera settings without consulting EMS Client Support.</u>

The following fields appear:

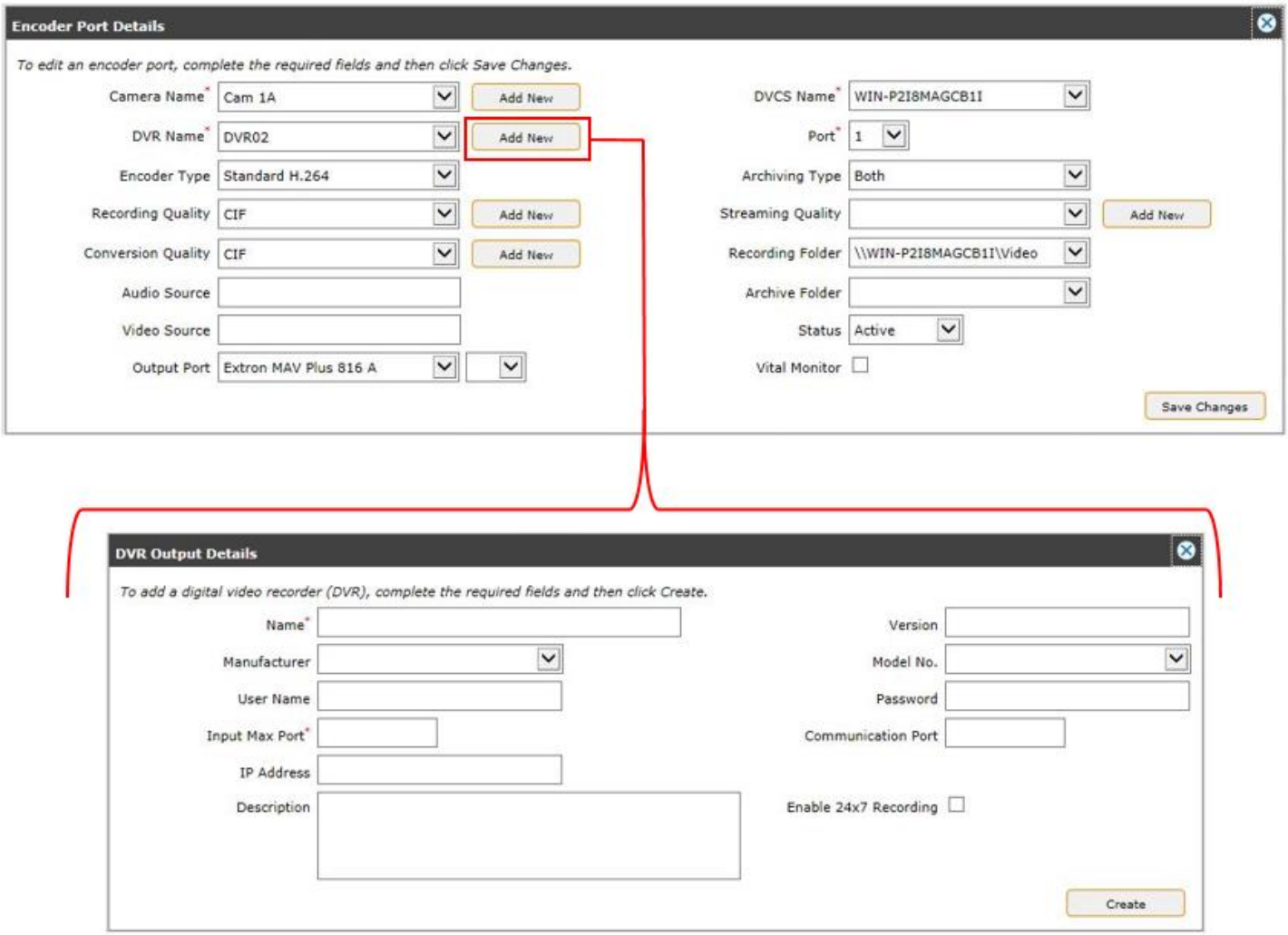
Field	Description
Name*	Enter the camera name.
Manufacturer	Select the name of the camera manufacturer from the drop-down list.
Firmware	
Type	Select Analog Camera, HIK Vision: IP Cam, or VNC: Screen Capture from the drop-down list.
Serial Number	Enter the camera serial number.
User Name	Enter your user name as determined by the EMS Support Administrator; this information is required to configure your

Field	Description
	event server to receive uploaded images and notification messages.
Version	Enter the camera version number.
Description	Enter a description of the camera including the camera's physical location.
Input Port	Select both a port type and a numeric value for the port at these fields.
Model No.	Select the camera model number from the drop-down list.
IP Address	Enter the IP address for the camera (**Note**: The first three numbers of the address of 192.168.2.4, for example, should be the same as that of the control workstation, such as 192.168.2.10).
Connection Type	Select TCP, HTTP, UDP, or CresNET from the drop-down list.
Digital Signals Start Point	This is a number mapped to a command string that indicates the first activity for this camera (e.g., 43 could indicate a pan-left movement by Camera 2). Contact your EMS Support Administrator for more information.
Password	Enter your password; this information is required to configure your event server to receive uploaded images and notification messages.
Streaming Device	Select a device to receive the streaming video from the drop-down list.
Status	Select **Active** or **Retired** (for an existing camera).
*- required field	

Click **Save Changes** to return to the Encoder Port Details dialog box.

	Field	Description
2	**DVR Name**	Select the encoder type for video capture to enable camera viewing (configured within AV Configuration/AV Devices in Settings by your EMS Administrator).
*-required field		

Click the **Add New** button to call up the following dialog:



Note: **<u>Please do not change any DVR settings without consulting EMS Client Support.</u>**

The following fields appear:

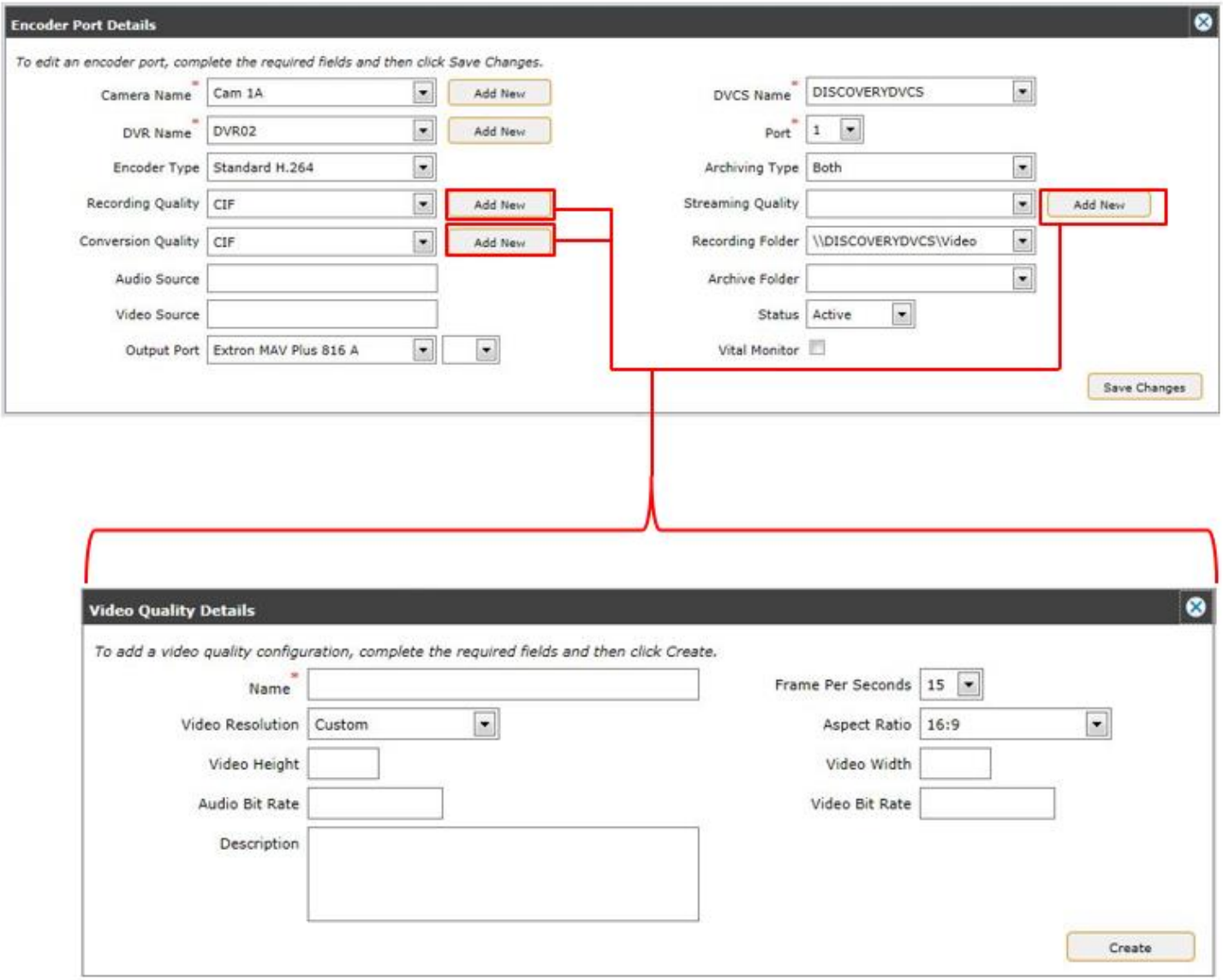
Field	Description
Name*	Enter the DVR name.
Manufacturer	Select the DVR manufacturer from the drop-down list.
User Name	Enter the user name that can access this DVR for configuration purposes.
Input Max Port	Enter the maximum number of input ports on the DVR.
IP Address	Enter the IP Address for the DVR (**Note**: The first three numbers of the address of 192.168.2.4, for example, should be the same as that of the control workstation, such as 192.168.2.10).

Field	Description
Description	Enter a description of the DVR including the DVR's physical location.
Version	Enter the DVR version number.
Model No.	Select the DVR model number from the drop-down list.
Password	Enter your password; this information is required to configure your event server to receive recordings from your DVR.
Communications Port	Enter the port number that will allow data transfer to and from the DVR server.
Enable 24 x 7 Recording	This is only applicable for a DVR supporting 24 x 7 recording (configured by your Support Administrator). **Note:** As of the Helium release, this functionality is compatible only with DVRs using the 3GP video file format.
*- required field	

Click **Save Changes** to return to the **Encoder Port Details** dialog box.

	Field	Description
3	**Encoder Type**	Select the encoder type for video capture to enable camera viewing (configured within AV Configuration/AV Devices in Settings by your EMS Administrator).
4	**Recording Quality**	Choose a video quality selection from the drop-down list (configured within AV Configuration/AV Devices in Settings by your EMS Administrator; this may be the same selection for both Conversion Quality and Streaming Quality).

Click the **Add New** button to call up the following dialog:



Note: <u>Please do not change any recording quality settings without consulting EMS Client Support.</u>

The following fields appear:

Field	Description
Name*	Enter the name associated with the video quality configuration.
Video Resolution	Select Custom, QCIF, CIF, or 4CIF from the drop-down list.
Video Height	Enter the height of the video in pixels.
Audio Bit Rate	This is the quality at which the audio recording is saved. The higher the bit rate, the better the quality of sound. However, the higher bit rate also increases the size of the file.

Field	Description
Description	This describes the video resolution settings configured for this encoder port (e.g., the Custom resolution based on factory settings could be 320 x 240 at 448 kbps).
Frames Per Second	Enter the frames per second depending on the quality of the video resolution; higher frame rates are recommended when recording scenes with a lot of movement.
Aspect Ratio	Select either 4:3 (Universal) or 16:9 (Widescreen, High Definition and European).
Video Width	Enter the width of the video in pixels.
Video Bit Rate	This refers to the quality of the video signal is saved at after some level of compression which is measured in bits per second. The higher the bit rate the better the quality. However, the higher bit rate also increases the size of the file.
*- required field	

Click **Save Changes** to return to the **Encoder Port Details** dialog box.

	Field	Description
5	**Conversion Quality**	Choose a video quality selection from the drop-down list (configured within AV Configuration/AV Devices in Settings by your EMS Administrator; this may be the same selection for both Recording Quality and Streaming Quality). **Note**: The same **Add New** functionality is available from this field as that of Field 4, Recording Quality.
6	**Audio Source**	Audio and Video sources are the physical port numbers on the DVR where the cameras are connected. They are generally marked as 1 for IP cameras that are not connected to a DVR and VNC screen capture setups.
7	**Video Source**	
8	**Output Port**	Select an Output Port number on the matrix switcher.
9	**DVCS Name***	Select a DVCS Encoder from the drop-down list.
10	**Port***	Select the encoder port number from the drop-down list.
11	**Archiving Type**	Select **Network Share**, **Device**, or **Both** from the drop-down list.
12	**Streaming Quality**	Choose a video quality selection from the drop-down list (configured within AV Configuration/AV Devices in Settings by your EMS Administrator; this may be the same selection for both Recording Quality and Conversion Quality). **Note**: The same **Add New** functionality is available from this field as that of Field 4, Recording Quality.
13	**Recording Folder**	Select the folder for real-time DVR recordings.
14	**Archive Folder**	Select the folder to use for archiving DVR recordings.
15	**Status**	Select Active or Retired (for an existing encoder port).
16	**Vital Monitor**	Click this checkbox for this port to be enabled for a vitals sign monitor in AV Control; please consult your AV Control documentation for more information

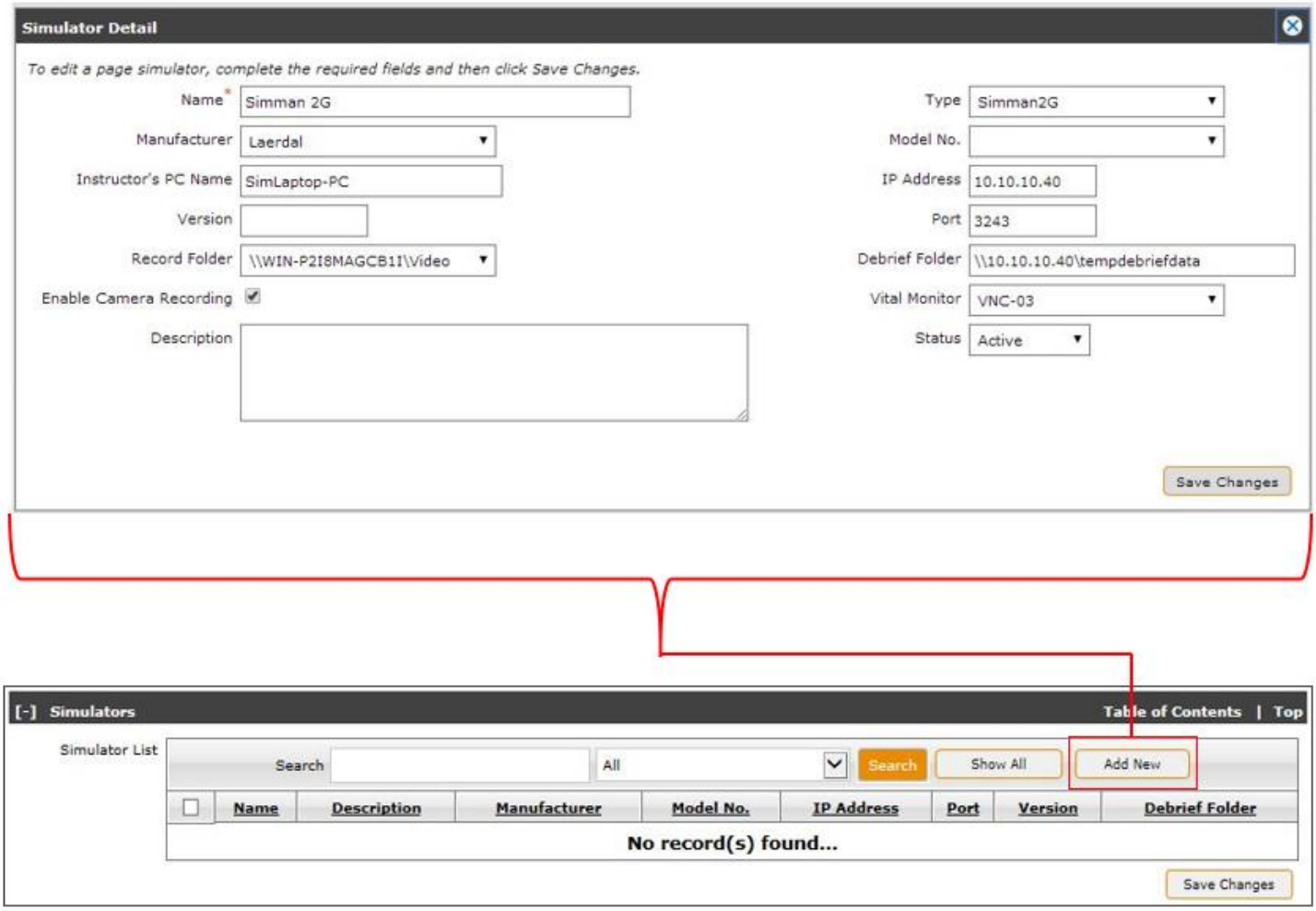
	Field	Description
		(**Note**: Your web and AV Control applications must be configured to the same URL to use this functionality).
	*-required field	

Click **Save Changes** to retain video input details entered at this dialog. Click **Save Changes** again at the grid to retain all grid selections.

Simulators

Note: Please do not change any simulator settings without consulting EMS Client Support.

Search for simulator details from the grid selections, or click **Add New** to add a new simulator, as follows:



Enter the following information:

Field	Description
Name*	Enter the simulator name (e.g., SimMan 3G).
Manufacturer	Enter the manufacturer name (e.g., Laerdal).
Instructor's PC Name	Enter the name of the instructor PC to which the simulator is mapped, including the name of the PC user followed by the domain name.
Version	Enter the version number of the simulator software.
Record Folder	Select the recording folder from the drop-down list (this may be the same as the folder for the DVR recordings).
Enable Camera Recording?	Click this checkbox to enable camera recording in the room where the simulator is to be used in a session.
Description	Enter simulator/room details at this text box.
Type	Select the simulator type from the drop-down list.
Model Number	Select the model number from the drop-down list.
IP Address	Enter the simulator IP address (mapped to the simulator laptop).
Port	Enter the simulator port number (mapped to the simulator laptop).
Debrief Folder	Enter the location of the files generated from the debriefing assessment.
Vital Monitor	If you clicked the **Vital Monitor** checkbox at the **Encoder Port** dialog for the room, the Vital Monitor will appear in the drop-down list; thics configures the vital monitor with the simulator.
Status	Select **Active** or **Retired** from the drop-down list for an existing simulator (Active is the default).
*- required field	

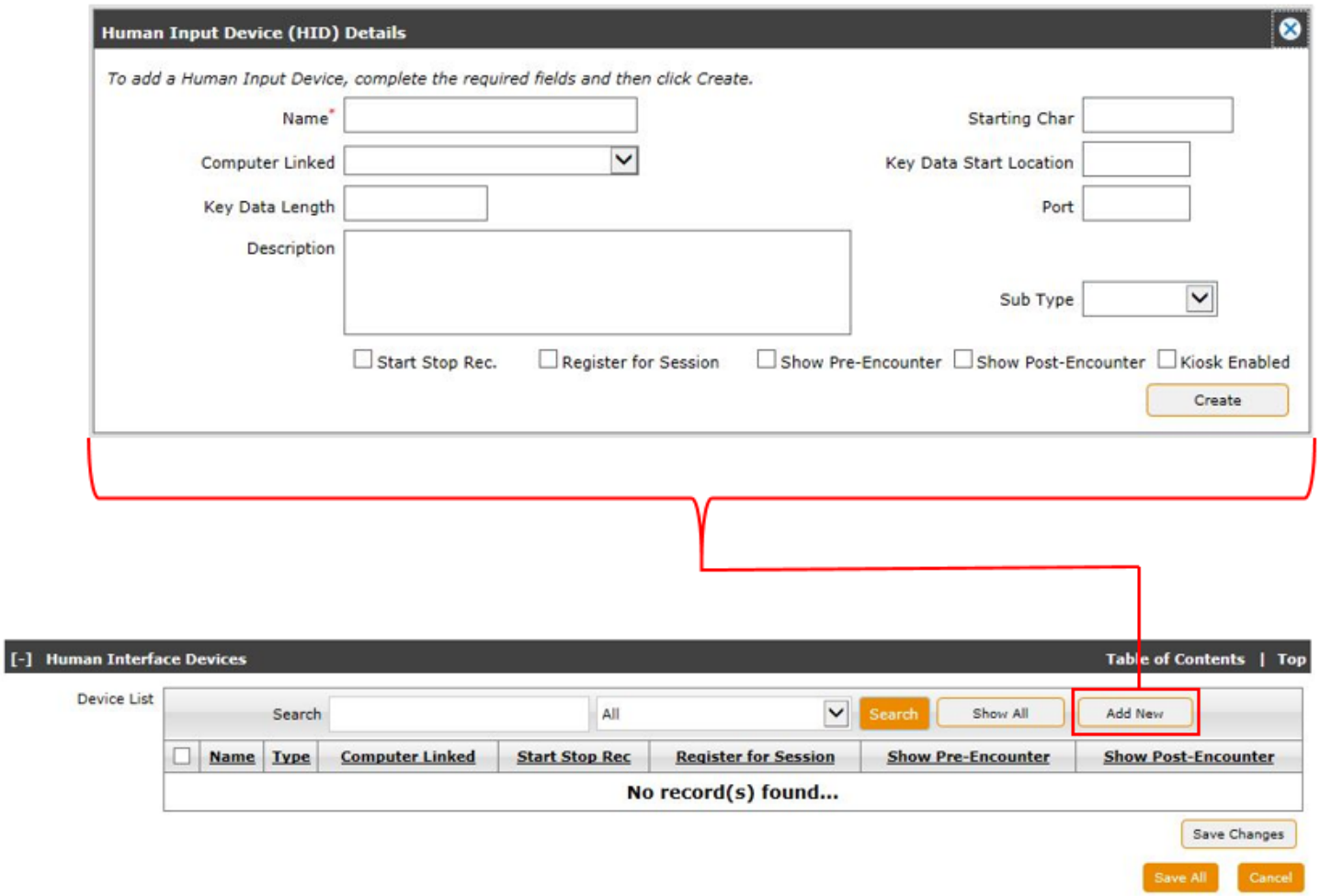
Note: If any updates to an existing simulator configuration affect AV Control, it may be necessary to restart the server (such as the SIM Server) to update the new settings (during the restart, the server/device may go offline briefly before the green Running status reappears). Please consult the AV System Monitor section of your AV Control/Viewer/SIM Client documentation for more information.

Click **Create** to retain new simulator details entered at this dialog. Click **Save Changes** again at the grid to retain all grid selections.

Human Interface Devices

Note: Please do not change any human interface device settings without consulting EMS Client Support.

Search for human interface device (HID) details from the grid selections, or click **Add New** to add a new device, as follows:



Enter the following information:

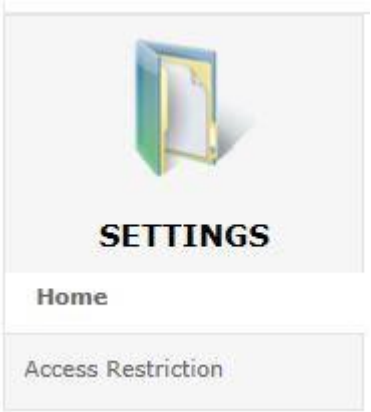
Field	Description
Name*	Identify the human interface device at this field (e.g., headset, fingerprint scanner, magnetic stripe reader, etc.)
Computer Linked	Select the computer linked to this device from the drop-down list.
Key Data Length	For a proximity card, this is the length of the string of transmitted data that validates the user and allows access to SIMULATIONiQ Enterprise (e.g., if the data string begins at field 15 and ends at field 35, the key data length would be 20).

Field	Description
Description	Enter a description of the human interface device in this text box.
Starting Char	For a proximity card, this is the starting character in the string of data to be transmitted that will validate the user and allow access to SIMULATIONiQ Enterprise.
Key Data Start Location	For a proximity card, this is the field location marking the beginning of the string to data to be transmitted (in the **Key Data Length** example, this would be field 15).
Port	Enter the port number of the mapped device so that data can be transmitted to that device.
Status	Select **Active** or **Retired** (for an existing device).
Sub Type	Select a default device type from a list of available selections that matches this device type.
*- required field	

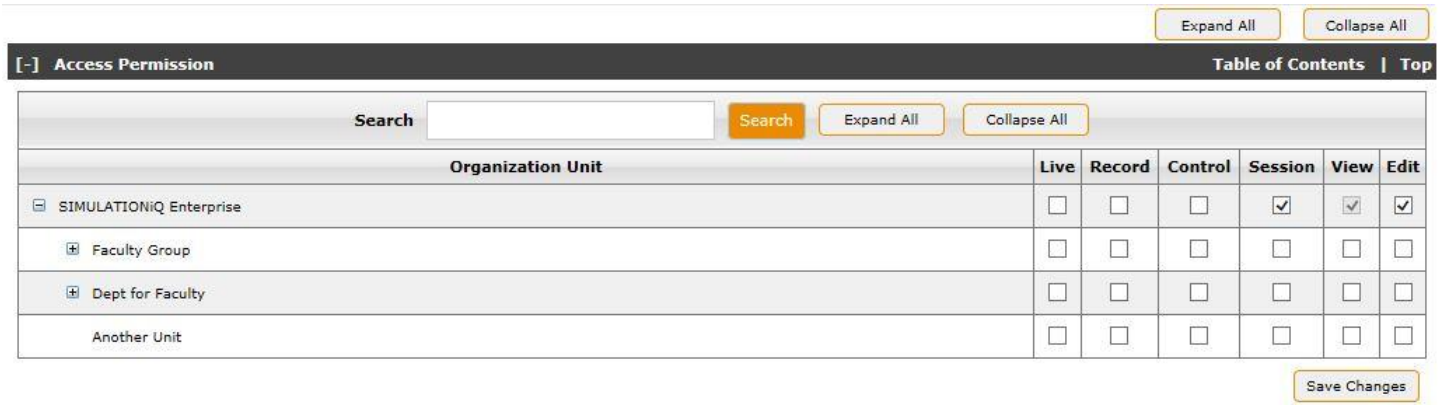
Click any one of the following checkboxes to designate the following HID functionality:

Field	Description
Start/Stop Rec.	Click this checkbox to enable HID functionality upon the start and stop of recording for a session.
Register for Session	Click this checkbox to enable HID functionality upon registration for a session.
Show Pre-Encounter	Click this checkbox to enable HID functionality during the learner pre-encounter.
Show Post-Encounter	Click this checkbox to enable HID functionality during the learner post-encounter.
Kiosk Enabled	Click this checkbox to enable HID functionality when operation the Kiosk.

Click **Save Changes** within each section of the Activity Page and **Save All** to retain all page selections. Click **Cancel** to get rid of any screen changes and return to the Landing Page; click **Print** to produce a hard copy of room details.



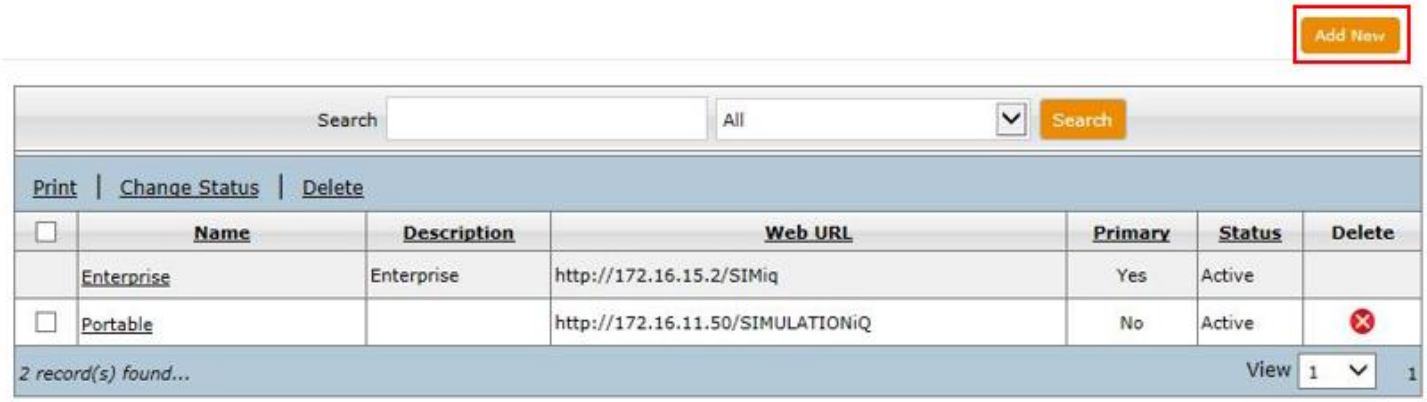
A Room tool belt appears to the left of the Room activity page. From here, you can click **Home** to acess the Room Activity Page or click **Access Restriction** to call up the following:



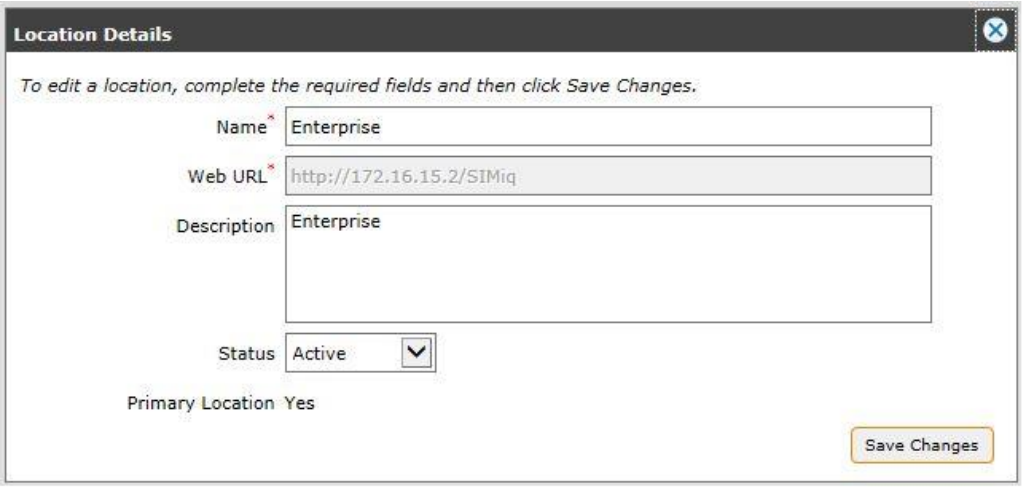
In this example, a user belonging to the SIMULATIONiQ Enterprise Organization Unit has view access (can read session activity page but make no changes; default for the session) as well as edit access (full access to edit the session).

Locations

Click Locations from the **Explore** tab; the following grid appears:



Click the **Add New** button and the following dialog appears:



Enter the following information:

Field	Description
Name*	Enter the name of the new location.
Web URL*	Enter the web URL mapped to your location.
Description	Enter a location description..
Archive Folder	Select an archive folder from your network to retain data input at this location.
Primary Location	If a Primary Location has already been entered, this field defaults to **No**.
*-required field	

Note: If selecting a secondary location, a **Sync** button appears on the dialog for synching the secondary location with a primary location.

Click **Create** when you have finished to save your location details.

Audio Paging Templates

Note: Make sure that **Paging Zones** are defined before creating any **Paging Template**.

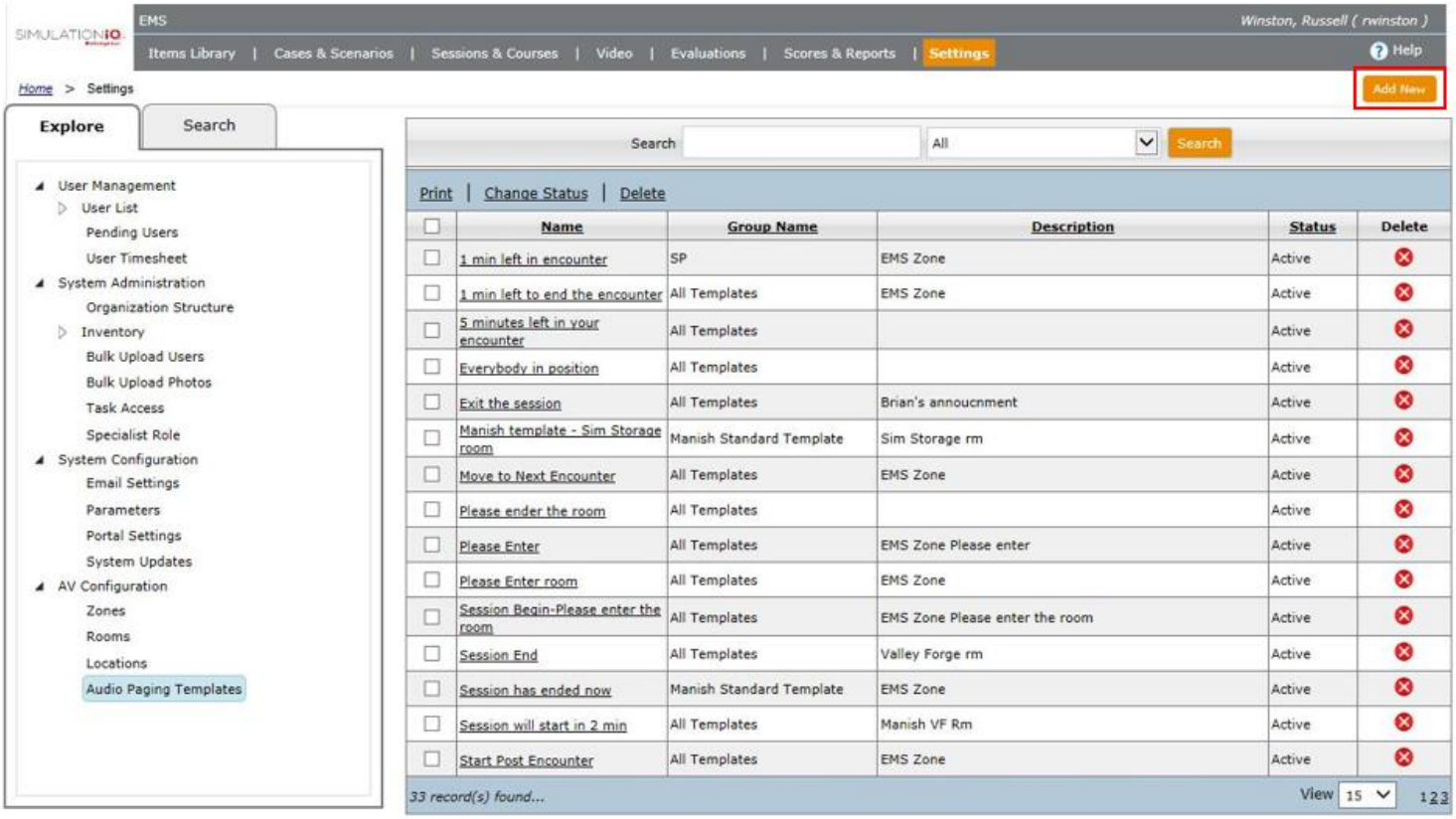
Note: An **Audio Paging Template** can only be a member of one zone. Think of a **Paging Template** as an envelope and the announcement message is the letter, one announcement message to one **Paging Template**. Deleting a template deletes the message inside of it (you can have more than one Paging Template in one **Template Group**, however).

Connecting the paging announcement to a **Paging Template** determines the precise time the announcement will be played in the session. The template defines the point within the encounter at which the message is to be played. You can link a paging announcement to one of four “events” (the beginning of a session, the beginning of each encounter, the end of each encounter, or the end of a session), and set it to play seconds or minutes before, after, or “immediately” in relation to each event. For example, you can set an announcement to play “2 minutes before the session starts,” “immediately after the end of each encounter,” and “5 minutes after the session ends.”

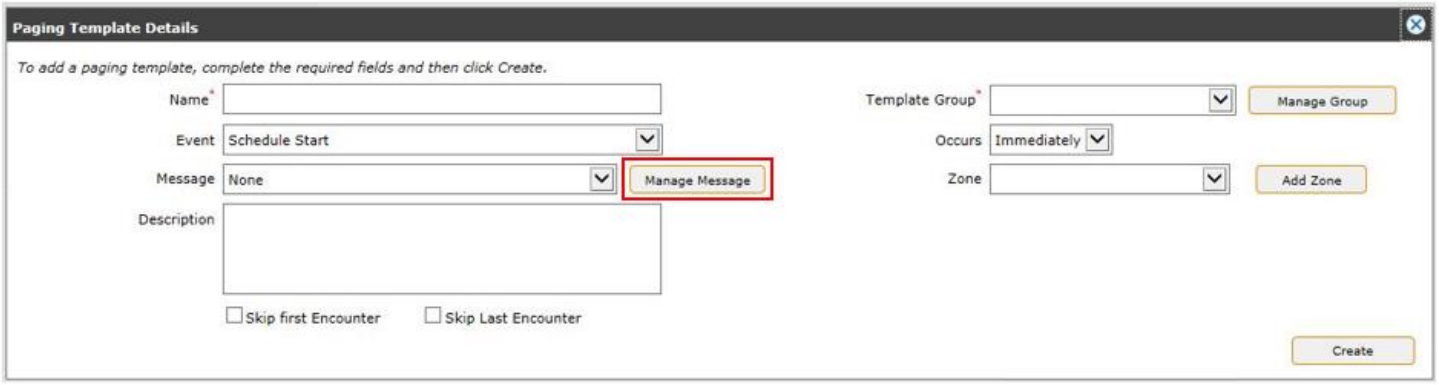
If you have a message such as “You may enter a room,” you may want that message to be heard “immediately” at the start of the encounter. For an announcement such as “You have two minutes remaining,” you may want this to play two minutes before the end of the encounter. By creating a template for each of these announcements and selecting the template when creating your session, the announcements will be heard during each encounter scheduled in the session.

To view a list of **Audio Paging Templates**, click the selection from either the Landing Page or the Explore tab.

The following view appears:



Click **Add New** to call up the following:



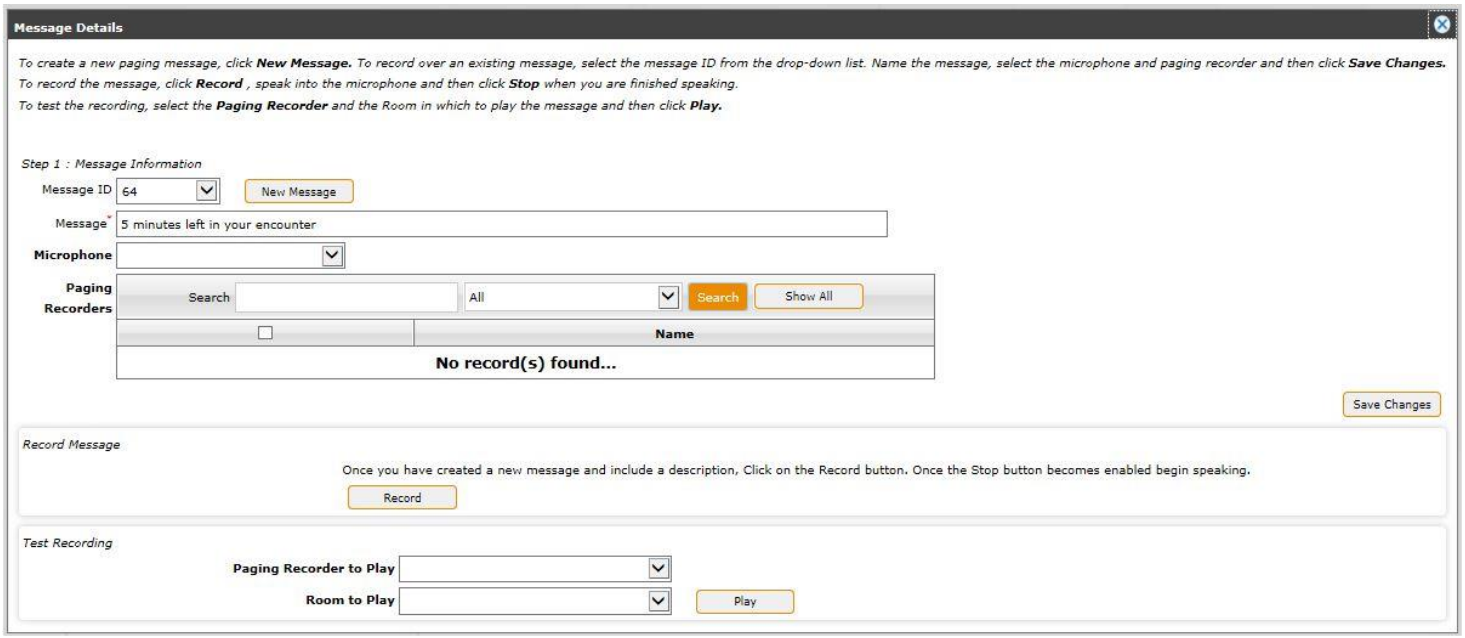
Enter the following information:

Field	Description
Name*	Enter the name of the paging template so that you can easily recognize its content and purpose.

Field	Description
Event	This identifies when the announcement is to be played. A paging announcement may be linked to one of four "Events": the beginning of the session, the beginning of the encounter, the end of the encounter, or the end of a session.
Message*	This is the message to be included in the template (the MacFi player can save up to 99 messages).
Description	Enter a description of the message.
Skip First Encounter	Click this checkbox if you do not want a message from the paging template to be heard for the first encounter in a session.
Skip Last Encounter	Click this checkbox if you do not want a message from the paging template to be heard for the last encounter in a session.
*-required field	

Add a Message to a Template

To manage messages (including creating new messages), click the **Manage Message** button to call up the following:



The following information appears:

Field	Description
Message ID	This is automatically assigned (click the **New Message** button to clear all other fields so a new message can be entered).

Field	Description
Message*	Enter the text of the message to be recorded.
MicroPhone	Select a microphone from a list for all rooms in the room zone associated with this **Audio Paging Template**.
MacFi Recorders	Click **Show All** to list all MacFi recorders in your system. Search by recorder name or click **Show All** to list all recorders. Click the checkbox next to the selected recorder and click **Show All** to view only those selections from the list.
Record Message	Click the **Record** button after making your microphone selection (the button changes to **Stop** while recording; click when you have finished). **Hint**: Try to avoid long periods of silence before, during, or after a recording. You might need to practice the recording sequence a few times until you are satisfied with the result.
Test Recording	
MacFi to Play	Select the recorder used for your message for playback also.
Room to Play	Select the room associated with the recorder for playback; click **Play** after you have made your recorder and room selections.
*-required field	

Template Groups

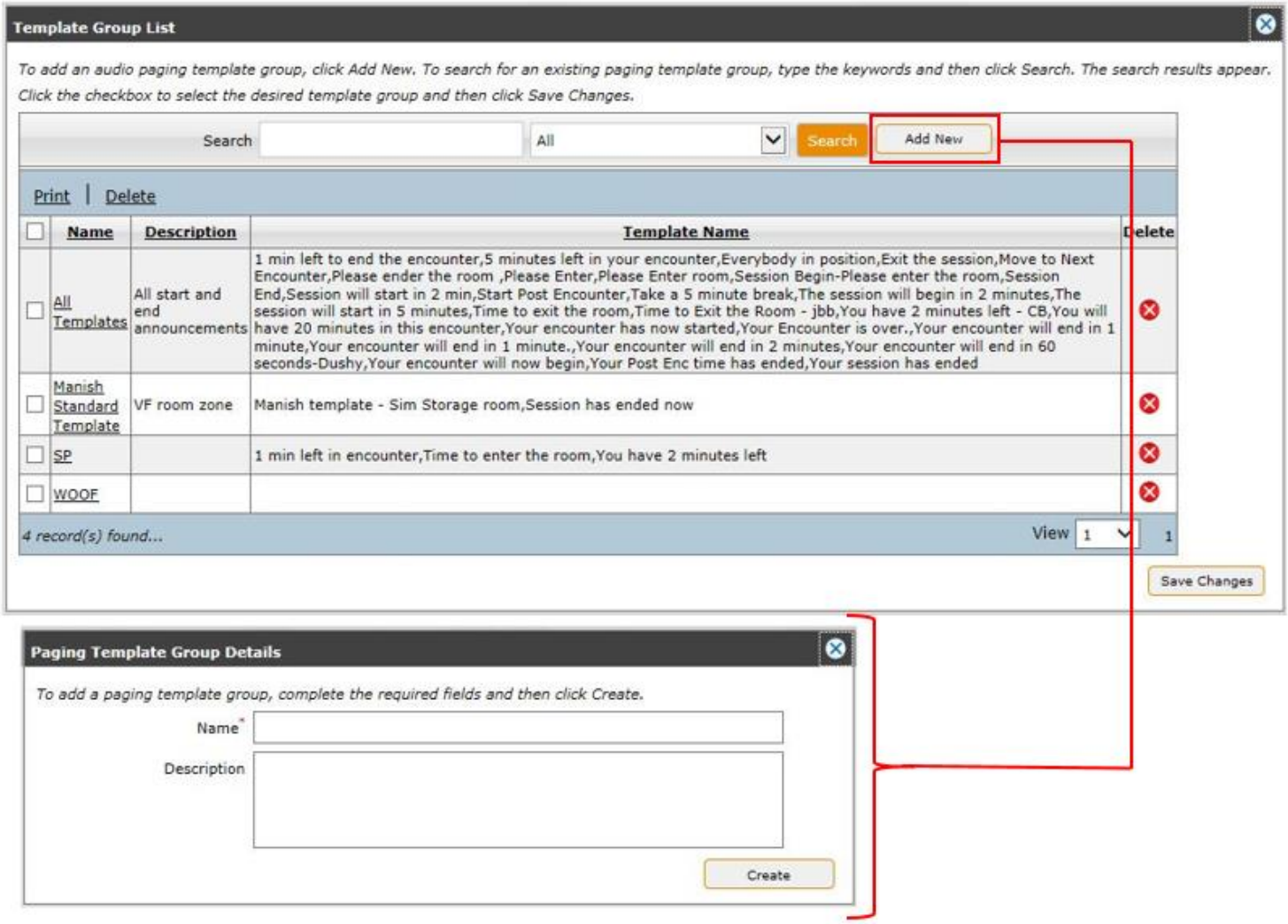
After entering message details, click **Save Changes** to return to the **Paging Template Details** dialog. From here, you can create a **Template Group**.

If you have a large number of **Paging Templates**, it might be helpful to organize them in **Template Groups**. For example, you might have several templates that you use for all of your OSCE events, and a different set that you use for training sessions.

The following selection appears:

Field	Description
Template Group*	Select a **Template Group** from the drop-down list.
*-required field	

To manage template groups (including creating new template groups), click the **Manage Group** button to call up the following:



Locate a **Template Group** within the grid by entering the **Name**, **Description**, or **Template Group Name** and pressing **Search**. You can also print a **Template Group** by clicking the checkbox next to the name and pressing **Print**. You can also delete a **Template Group** by clicking the applicable checkbox and pressing ⊗.

Click the **Add New** button at the **Template Group List** dialog to define a new **Paging Template Group**. When you have finished entering the name of the template group (required) and a description (optional), click **Create**. The new **Paging Template Group** can now be assigned to a **Paging Template**.

Click the **Save Changes** button to return to the **Paging Template Details** dialog.

Assign a Template to a Paging Zone

The following selections appear for adding a **Paging Zone**:

Field	Description
Occurs	This designates the point related to the encounter when the message is to be played. Select **Before** (default), **Immediately** or **After** from the drop-down list (enter the numeric value and select seconds or minutes). For example, if you have a message such as "You may enter a room," you may want that message to be heard "immediately" at the start of the encounter. For an announcement such as "You have two minutes remaining," you may want this to play two minutes before the end of the encounter.
Zone	Select the **Room Zone** from the drop-down list; click Add Zone to call up the **Zone Details** dialog box (described in the Paging Zones section).
Status	Select **Active** or **Retired** (Active is the default) for existing templates.

After entering the required information at this dialog, you have now performed the following:

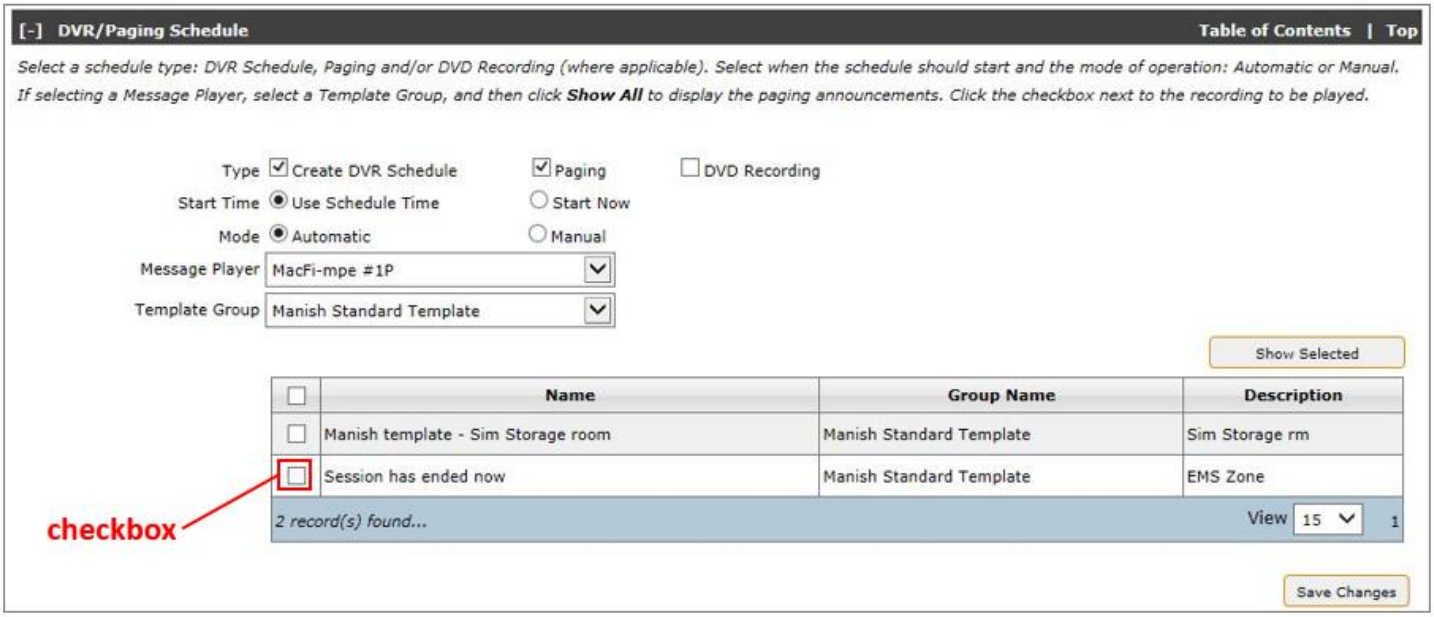
1) Linked a new or existing message with a **Paging Template**.
2) Associated the Paging Template with a **Paging Template Group**.
3) Associated the Paging Template Group with a **Room Zone**.

Click **Save Changes** to retain all **Paging Template Details**.

Create a Paging Schedule

Within the Session Calendar, select an existing session to add a paging schedule or create a paging schedule for a new session; please consult your Session Calendar documentation for more details (information is also available from the Online Guide that can be accessed by clicking the  icon in the upper right corner within the web application).

A sample **DVR/Paging Schedule** section within the Session Activity Page appears below:



Enter the following information:

Field	Description
Create DVR Schedule	Check this box to send the session recording to AV Control.
Paging Schedule	Check this box and the paging **Template Group** drop-down list is populated.
DVD Recording	Check **DVD Recording** to make a recorded file that will play on a DVD player (optional equipment).
Start Time	Select whether the start time will **Use Schedule Time**, which is the time specified in the General Information section of this activity page; select **Start Now** to start the recording immediately.
Mode	Click the **Automatic** radio button to assign a pre-recorded paging template to be played during the automated session. Click **Manual**, and use intervention will be required to play the recorded messages or make announcements at the recording session.
Message Player	Select a **Message Player** from the drop-down list.
Template Group	Select a **Template Group** from the drop-down list; messages associated with the selected **Template Group** appear in the grid.

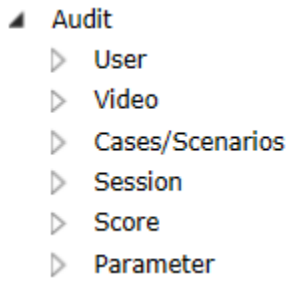
Click **Save Changes** after you have entered your session details and click **Save All** at the top of the activity page. This retains paging details for your scheduled session (these details also appear when selecting the session in AV Control).

Audit Log

B

The Audit Log tracks the following User, Video, Case and Scenario, Session, and Score activity in SIMULATIONiQ Enterprise for the current date, the last 7 days, or the last 30 days.

The Audit selections appear as follows from the Explore tab:



The Audit selections appear as follows from the Search tab:

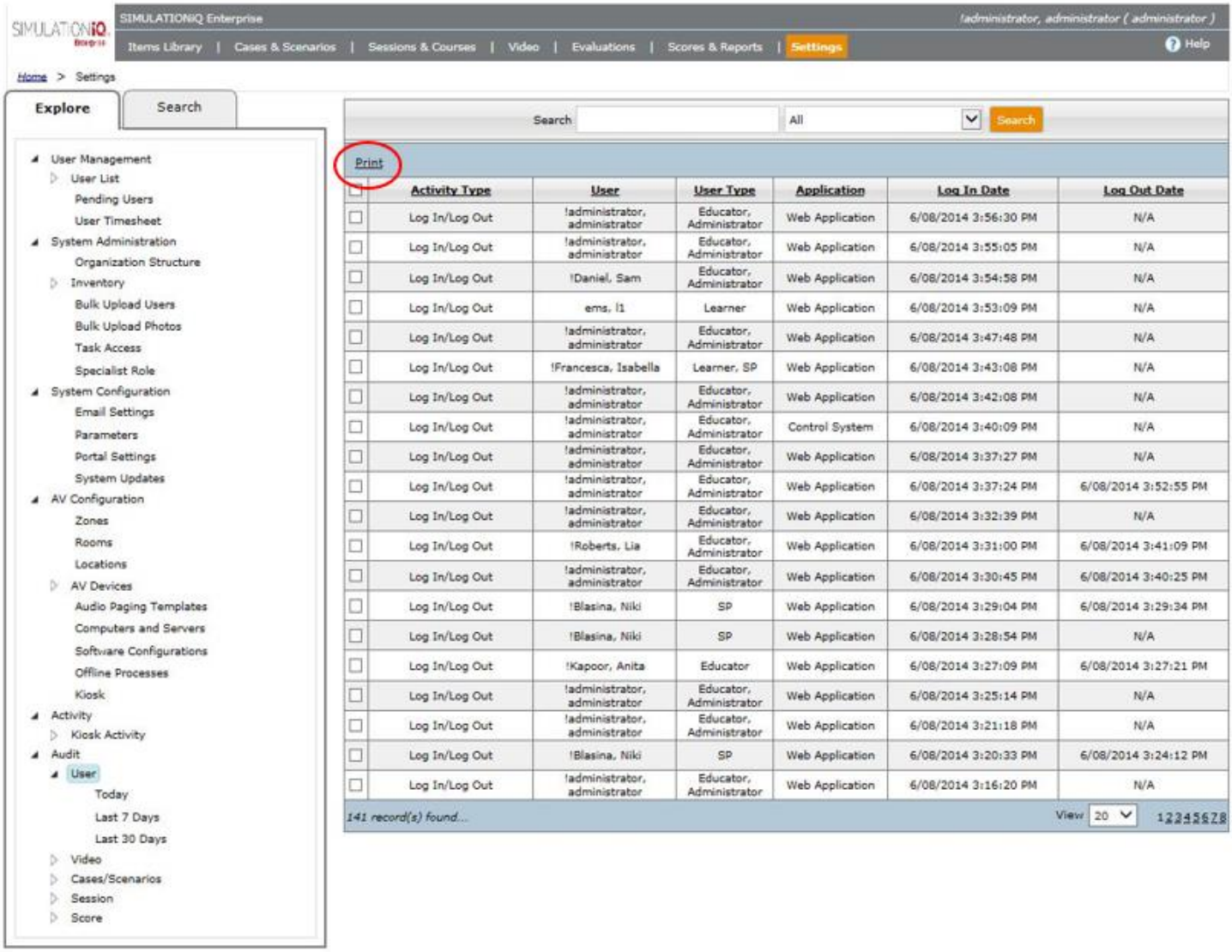
To search for User, Video, Case & Scenario, Session, and Score audit log data:

1. Click the **Settings>Search** tab.
2. Click the Search By drop-down arrow and the select **Audit**.
3. Enter the search criteris and then click **Search**.

IMPORTANT! The system will only display audit data for the number of days indicated in the Audit Log parameter.

User

The User audit log selections appear as follows from the Explore tab:



Activity Type	User	User Type	Application	Log In Date	Log Out Date
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:56:30 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:55:05 PM	N/A
Log In/Log Out	!Daniel, Sam	Educator, Administrator	Web Application	6/08/2014 3:54:58 PM	N/A
Log In/Log Out	ems, l1	Learner	Web Application	6/08/2014 3:53:09 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:47:48 PM	N/A
Log In/Log Out	!Francesca, Isabella	Learner, SP	Web Application	6/08/2014 3:43:08 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:42:08 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Control System	6/08/2014 3:40:09 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:37:27 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:37:24 PM	6/08/2014 3:52:55 PM
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:32:39 PM	N/A
Log In/Log Out	!Roberts, Lia	Educator, Administrator	Web Application	6/08/2014 3:31:00 PM	6/08/2014 3:41:09 PM
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:30:45 PM	6/08/2014 3:40:25 PM
Log In/Log Out	!Blasina, Niki	SP	Web Application	6/08/2014 3:29:04 PM	6/08/2014 3:29:34 PM
Log In/Log Out	!Blasina, Niki	SP	Web Application	6/08/2014 3:28:54 PM	N/A
Log In/Log Out	!Kapoor, Anita	Educator	Web Application	6/08/2014 3:27:09 PM	6/08/2014 3:27:21 PM
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:25:14 PM	N/A
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:21:18 PM	N/A
Log In/Log Out	!Blasina, Niki	SP	Web Application	6/08/2014 3:20:33 PM	6/08/2014 3:24:12 PM
Log In/Log Out	!administrator, administrator	Educator, Administrator	Web Application	6/08/2014 3:16:20 PM	N/A

Note: Regardless of access restrictions, all Administrators always have full access to the application.

This grid displays user log in/log out activity, as shown:

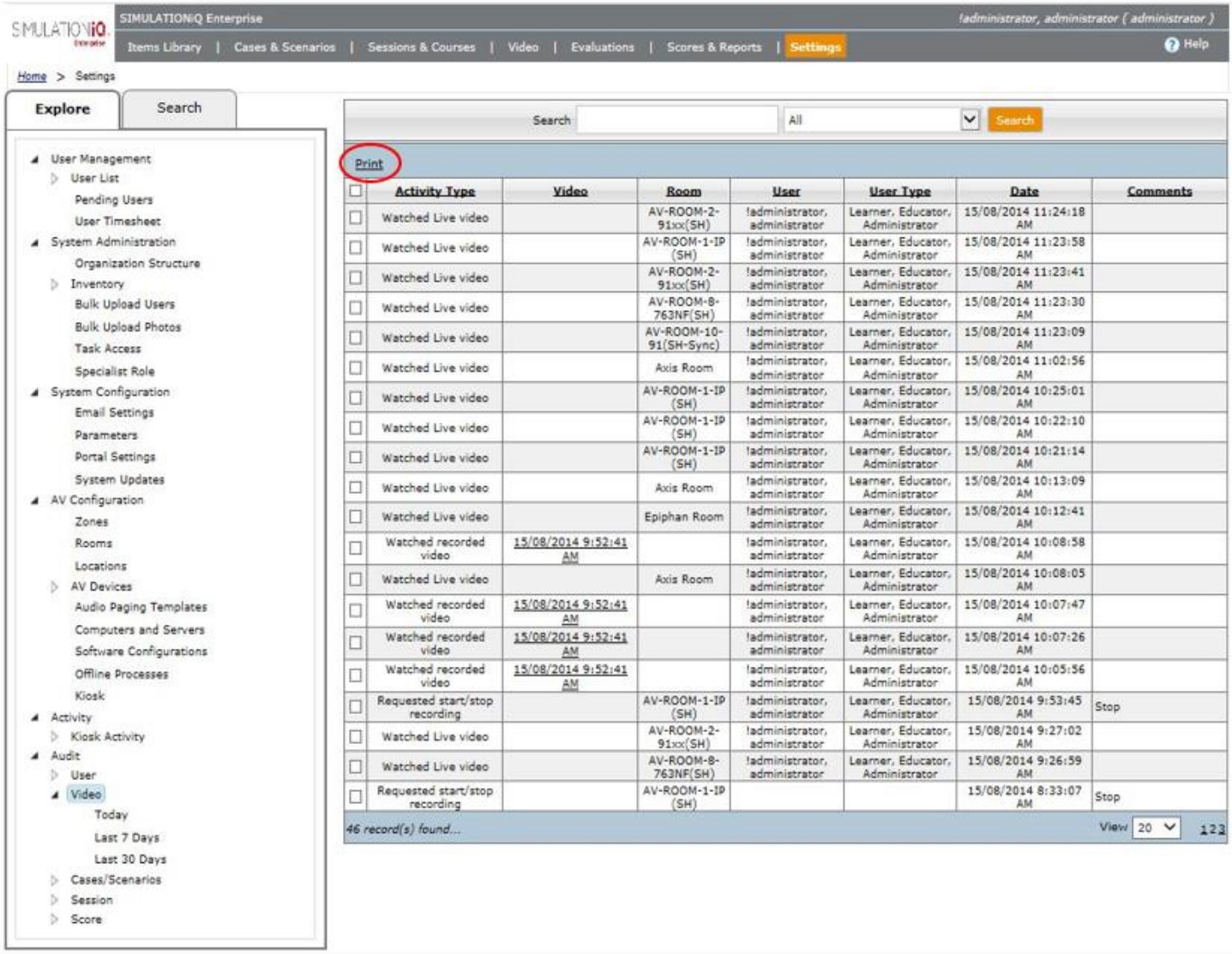
Field	Description
Activity Type	This displays the Log In/Log Out activity of the user (either when the user logs into or out of the web or AV application or when the user is automatically logged out of the web or AV application).
User	This displays the User Name
User Type	This displays the User Type (can be more than one, such as Educator and SP).
Application	This displays the application upon which the user has logged in and/or logged off (such as the web or AV desktop applications).

Field	Description
Log In Date	This displays the date and time of the user's logon activity.
Log Out Date	This displays the date and time of the user's logoff activity.

Click a checkbox or checkboxes to select audit details for a user or group of users; click the **Print** link on the action bar as shown to print a user audit report.

Video

The Video audit log selections appear as follows from the Explore tab:



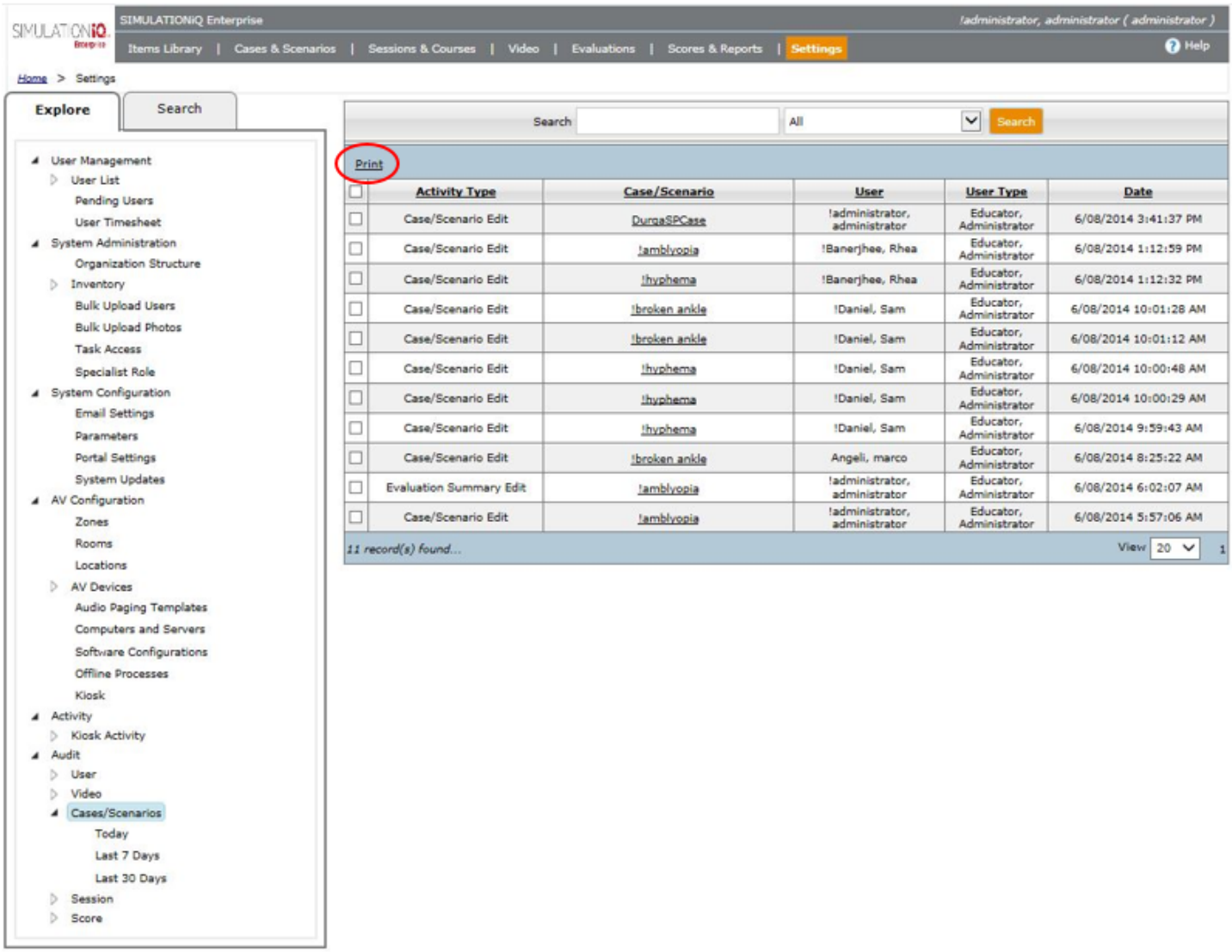
This grid displays video-related audit activity, as shown:

Field	Description
Activity Type	This displays the type of video-related activity from the following selections: • Watch Live Video • Watch Recorded Video • Requested Video Deletion • Requested Start/Stop Recording • Saved Changes to Video Access
Video	Click the hyperlink to view the video, if available; the link displays the video popup with the option for the user to select show details and navigate to the video activity page.
Room	This displays the room in which the video was recorded (if watching live video).
User	This displays the user name.
User Type	This displays the user type.
Date	This displays the date and time stamp associated with the video.
Comments	This displays any comments associated with the video (e.g., Start and Stop for requesting start/stop recording).

Click a checkbox or checkboxes to select audit details for a video or group of videos; click the **Print** link on the action bar as shown to print a video audit report.

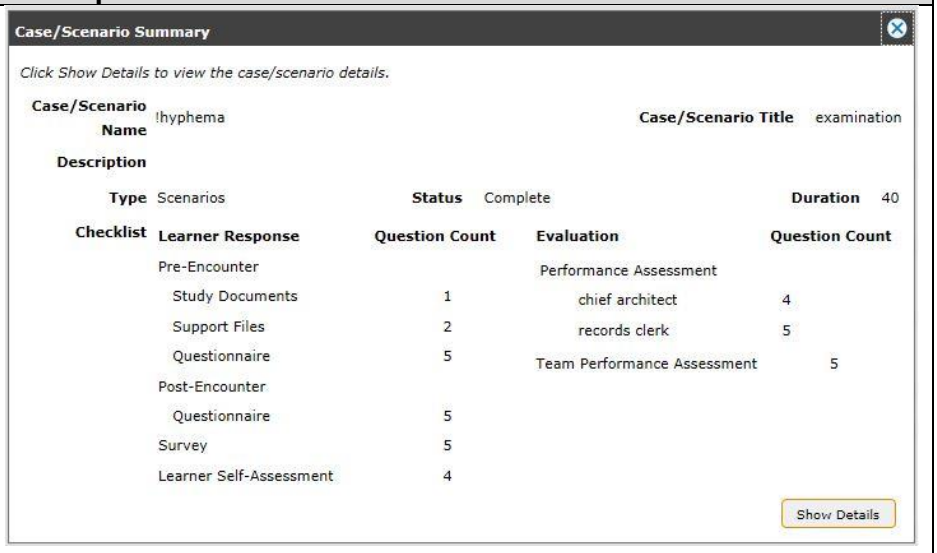
Case/Scenario

The Case/Scenario audit log selections appear as follows from the Explore tab:



This grid displays case and scenario-related audit activity, as shown:

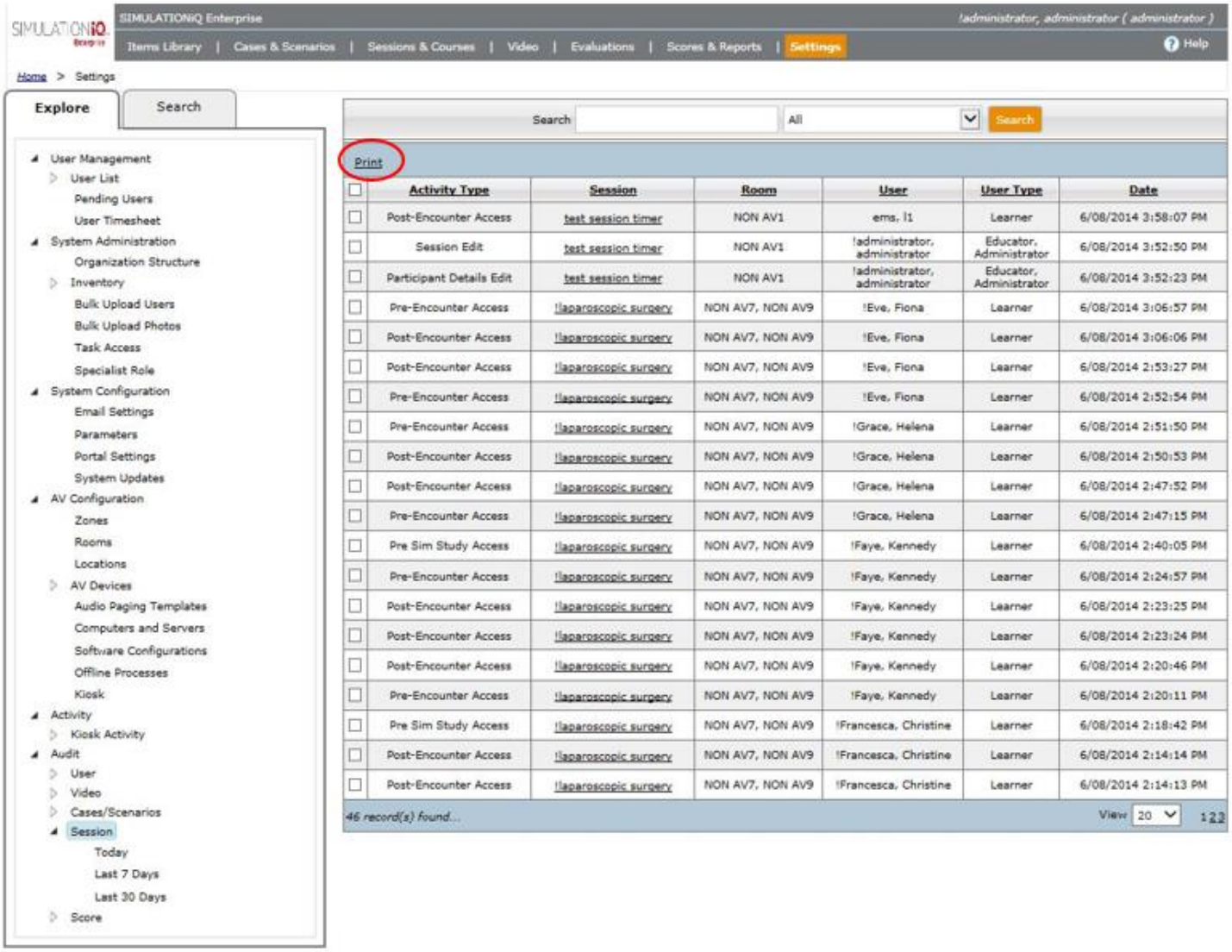
Field	Description
Activity Type	This displays the type of Case/Scenario audit activity; this would be Case/Scenario Edit for the entire activity page except Evaluation Summary or Learner Assessment (activity is triggered when user selects **Save** or **Save All**).
Case/Scenario	Click this hyperlink to view a summary of Case/Scenario activity (a sample follows):

Field	Description
	 Case/Scenario Summary Click Show Details to view the case/scenario details. Case/Scenario Name: !hyphema Case/Scenario Title: examination Description: Type: Scenarios Status: Complete Duration: 40 Checklist Learner Response — Question Count Pre-Encounter Study Documents 1 Support Files 2 Questionnaire 5 Post-Encounter Questionnaire 5 Survey 5 Learner Self-Assessment 4 Evaluation — Question Count Performance Assessment chief architect 4 records clerk 5 Team Performance Assessment 5 Show Details Click the **Show Details** button to view the Case/Scenario Activity page.
User	The name of the user performing the audit activity appears at this field.
User Type	The type of the user performing the audit activity appears at this field.
Date	The date and time of the audit activity appears at this field.

Click a checkbox or checkboxes to select audit details for a case/scenario or a group; click the **Print** link on the action bar as shown to print a case/scenario audit report.

Session

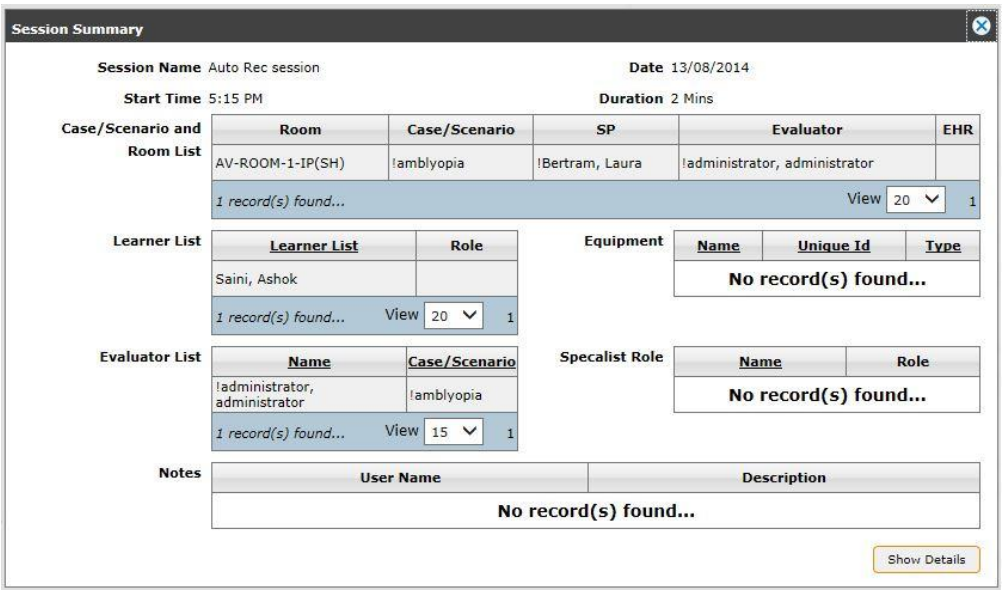
The Session audit log selections appear as follows from the Explore tab (including Event activity – click the **Session** column hyperlink to sort by application within the Sessions and Courses module):



Activity Type	Session	Room	User	User Type	Date
Post-Encounter Access	test session timer	NON AV1	ems, l1	Learner	6/08/2014 3:58:07 PM
Session Edit	test session timer	NON AV1	!administrator, administrator	Educator, Administrator	6/08/2014 3:52:50 PM
Participant Details Edit	test session timer	NON AV1	!administrator, administrator	Educator, Administrator	6/08/2014 3:52:23 PM
Pre-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Eve, Fiona	Learner	6/08/2014 3:06:57 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Eve, Fiona	Learner	6/08/2014 3:06:06 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Eve, Fiona	Learner	6/08/2014 2:53:27 PM
Pre-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Eve, Fiona	Learner	6/08/2014 2:52:54 PM
Pre-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Grace, Helena	Learner	6/08/2014 2:51:50 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Grace, Helena	Learner	6/08/2014 2:50:53 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Grace, Helena	Learner	6/08/2014 2:47:52 PM
Pre-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Grace, Helena	Learner	6/08/2014 2:47:15 PM
Pre Sim Study Access	!laparoscopic surgery	NON AV7, NON AV9	!Faye, Kennedy	Learner	6/08/2014 2:40:05 PM
Pre-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Faye, Kennedy	Learner	6/08/2014 2:24:57 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Faye, Kennedy	Learner	6/08/2014 2:23:25 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Faye, Kennedy	Learner	6/08/2014 2:23:24 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Faye, Kennedy	Learner	6/08/2014 2:20:46 PM
Pre-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Faye, Kennedy	Learner	6/08/2014 2:20:11 PM
Pre Sim Study Access	!laparoscopic surgery	NON AV7, NON AV9	!Francesca, Christine	Learner	6/08/2014 2:18:42 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Francesca, Christine	Learner	6/08/2014 2:14:14 PM
Post-Encounter Access	!laparoscopic surgery	NON AV7, NON AV9	!Francesca, Christine	Learner	6/08/2014 2:14:13 PM

This grid displays case and scenario-related audit activity, as shown:

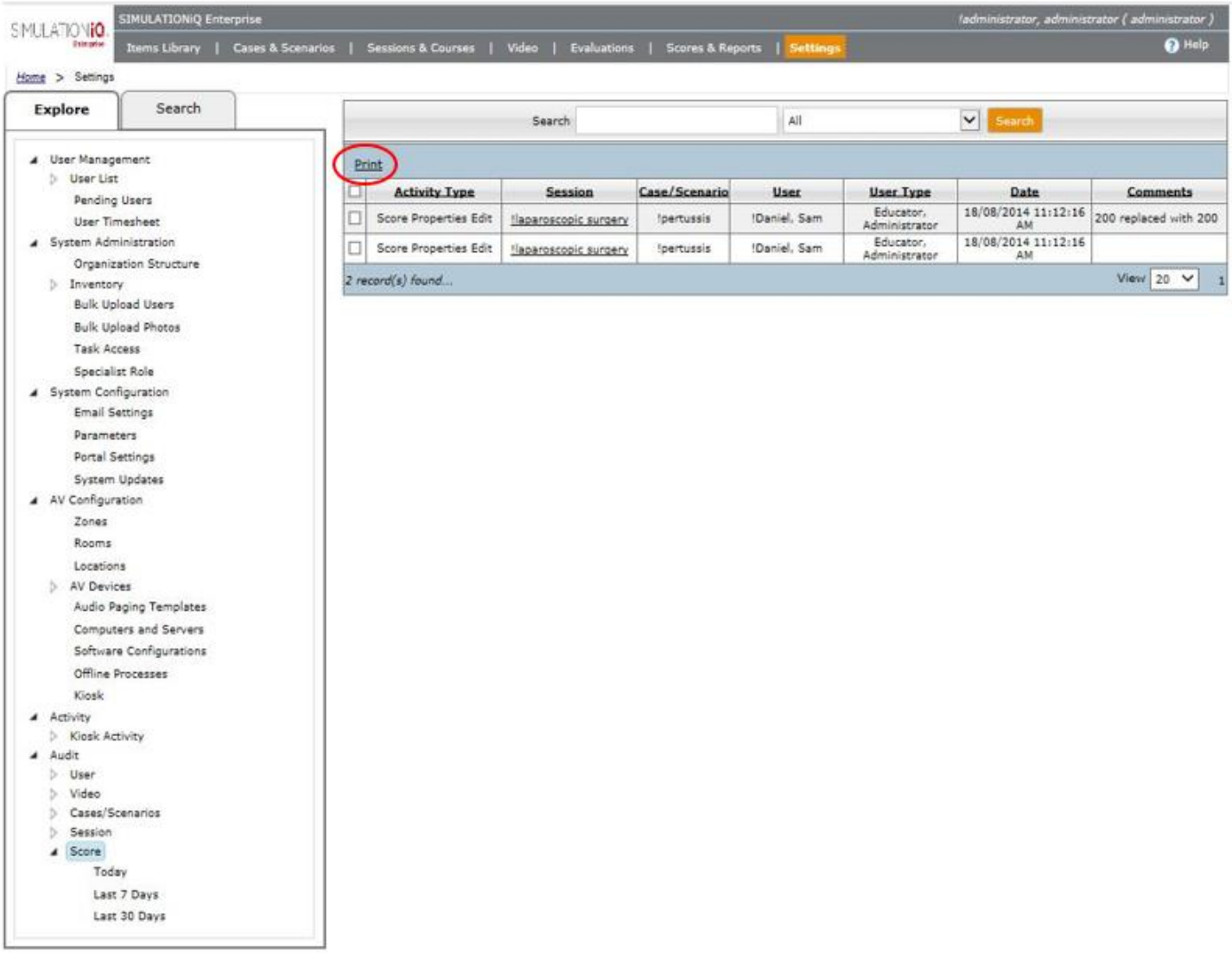
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Activity Type</td><td>This displays the following types of Session audit activity:
<table>
<tr><th>Section of Session Activity Page</th><th>Save Type</th><th>Session Save (for overall page)</th></tr>
<tr><td>General Information</td><td></td><td>✓</td></tr>
<tr><td>Case/Scenario Details</td><td>Case/Scenario Details</td><td></td></tr>
<tr><td>Participant Details</td><td>Participant Details</td><td></td></tr>
<tr><td>Session Evaluators</td><td>Session Evaluators</td><td></td></tr>
<tr><td>Specialists and Support Staff</td><td></td><td>✓</td></tr>
</table></td></tr>
</table>

Field	Description
	<table><tr><td>Equipment List</td><td></td><td>✓</td></tr><tr><td>Messaging</td><td></td><td>✓</td></tr><tr><td>DVR/Paging Schedule</td><td>DVR/Paging Schedule</td><td></td></tr><tr><td>Learner Survey</td><td></td><td>✓</td></tr><tr><td>Shrink Details</td><td></td><td>✓</td></tr><tr><td>Accreditation Details</td><td></td><td>✓</td></tr><tr><td>Incident Reports</td><td></td><td>✓</td></tr><tr><td>Session Notes</td><td></td><td>✓</td></tr><tr><td>Tool Belt (Practice/Edit Responses)</td><td>Pre-Encounter Access</td><td></td></tr><tr><td>Tool Belt (Practice/Edit Responses)</td><td>Post-Encounter Access</td><td></td></tr><tr><td>Tool Belt (Practice/Edit Responses)</td><td>Pre-Sim Study Access</td><td></td></tr></table> Audit activity is triggered when user selects **Save** or **Save All**.
Session	Click this hyperlink to view a summary of Session activity (a sample follows):  Click the **Show Details** button to view the Session activity page.
Room	This displays the name of the room where the session took place.
User	The name of the user performing the audit activity appears at this field.
User Type	The type of the user performing the audit activity appears at this field.
Date	The date and time of the audit activity appears at this field.

Click a checkbox or checkboxes to select audit details for a session or a group; click the **Print** link on the action bar as shown to print a session audit report.

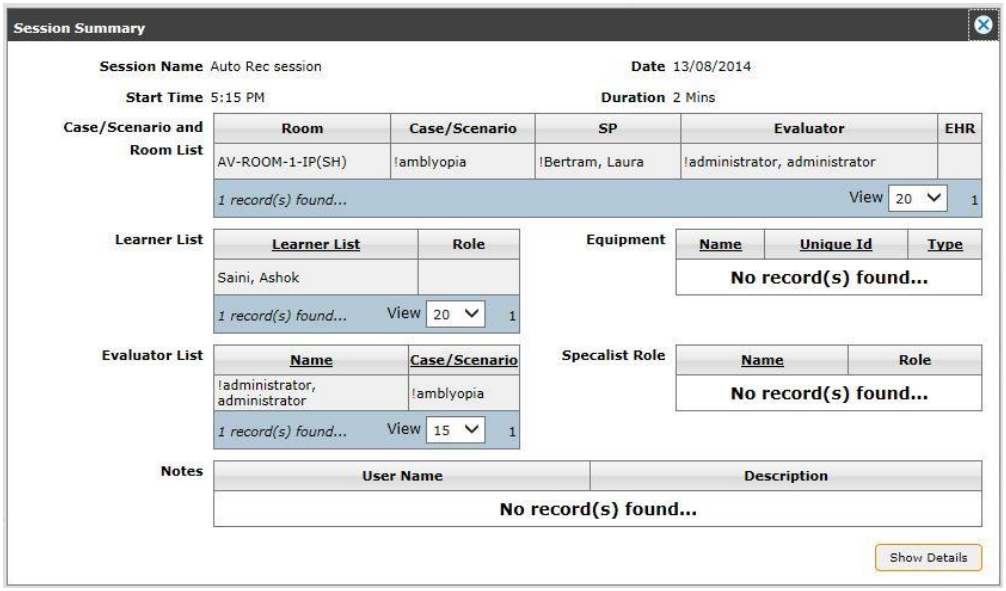
Score

The Score audit log selections appear as follows from the Explore tab:



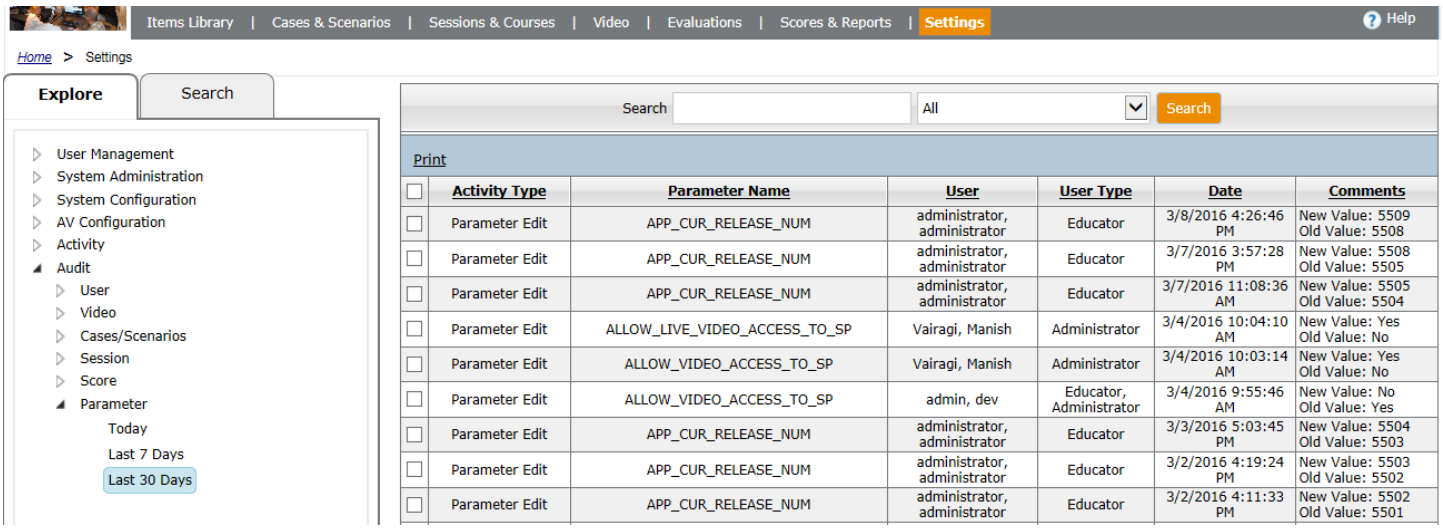
This grid displays scoring audit activity, as shown:

Field	Description
Activity Type	This displays the type of scoring audit activity; this would be a Score Properties save for the entire activity page except Evaluation Response (activity is triggered when user selects **Save** or **Save All**).
Session	Click this hyperlink to view a summary of Session activity (a sample follows):

Field	Description
	 Click the **Show Details** button to view the Session activity page.
Case/Scenario	The Case/Scenario name appears at this field.
User	The name of the user performing the audit activity appears at this field.
User Type	The type of the user performing the audit activity appears at this field.
Date	The date of the audit activity appears at this field.
Comments	Information describing the audit activity appears at this field.

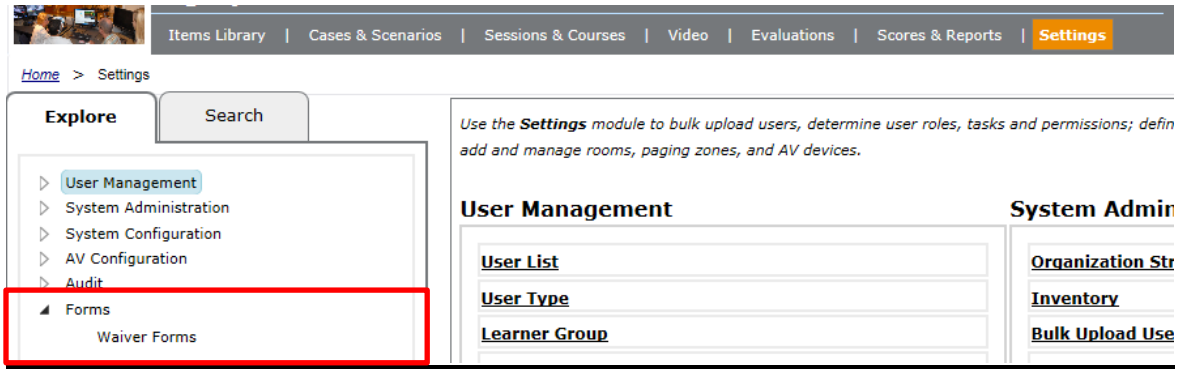
Click a checkbox or checkboxes to select scoring audit details for a single case/scenario and session combination or a group; click the **Print** link on the action bar as shown to print a scoring audit report.

Parameter



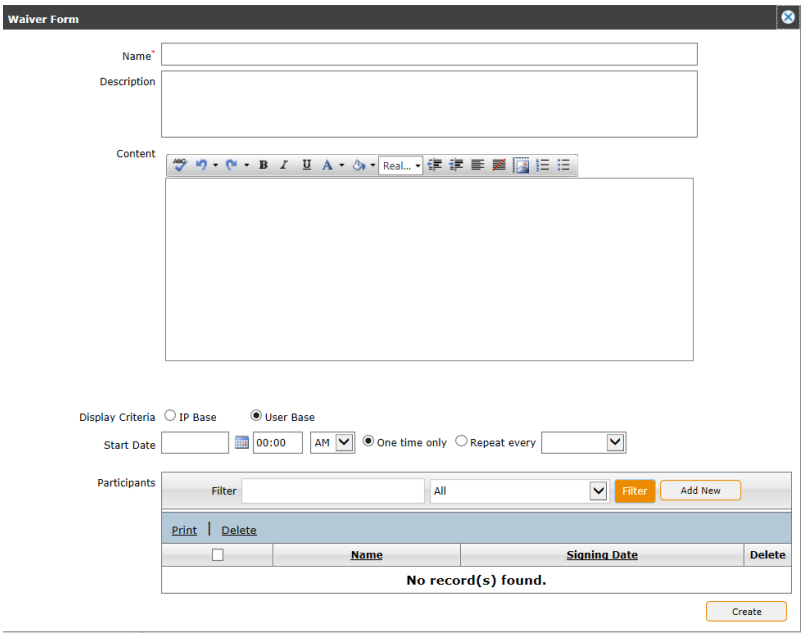
Parameter auditing tracks user name, parameter name and parameter change when a parameter is updated.

Forms



Create a waiver form, such as a video consent disclaimer or confidentially agreement to display after login to capture a digital signature to indicate agreement to the terms.

1. Click **Settings > Forms > Waiver Forms > Add New.**



2. Complete the fields as follows:

Name	Name of the waiver form.
Description	Description of the waiver.
Content	Type the text of what should be displayed in the waiver, e.g., video consent disclaimer or confidentially agreement.
Display Criteria	Select whether to display the waiver based on IP address or user.
Start Date	Enter the start date and time to display the waiver. Click to display once or repeat every 3, 6, 9, or 12 months.

Participants	Select All or click Add New to filter and select participants by User Type, Role, Graduation Year, Learner Group, Keywords or select participants from the grid. Click Assign Participants.

3. Click **Create** to add the waiver form. The form appears after user authentication and users must agree to the terms of the disclaimer in order to access the application.

Appendix A – User Access Security

Introduction

Use the SIMULATIONiQ™ Enterprise User Access Security feature to grant secure access to the following:

- **Cases & Scenarios**
- **Sessions**
- **Rooms**

IMPORTANT! User Access Security is **disabled by default**. You must follow the steps in this document to enable this feature.

In order to grant access properly:

1. All users must belong to an Organization Unit or Learner Group. ***Note***: If a user belongs to more than one Organization Unit, the system will grant access according to the highest privilege available.

2. The **Enable user access security** parameter must be set to **Yes**.

3. The **Default security access** parameter must be set to one of the following:
   - Author-only
   - Organization unit-only
   - Public access: all organization units can access

   IMPORTANT! Users always have access to the Cases & Scenarios, Sessions, and Rooms they create.

   Note: This parameter is used to allow access to any **NEW** Cases & Scenarios, Sessions or Rooms that are created once user access security is enabled. For example, when a new session is created, security access determines who has access to the session by default.

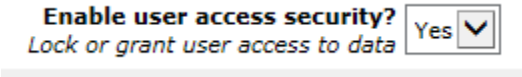
4. Security access to **EXISTING** Cases & Scenarios, Sessions or Rooms must be set. Complete the steps on the following pages to grant access.

Parameters

To apply user access security, enable the following two Parameters first:

1) Enable user access security

1. Click **Settings > Parameters**.



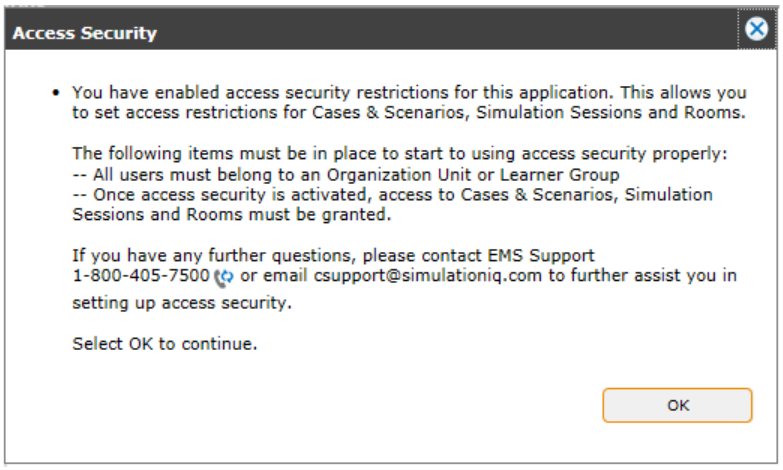
2. In the **General** section, click **Yes** next to the **Enable user access security** parameter.

The following message appears to remind you that:

- You have enabled access security restrictions for Cases & Scenarios, Sessions, and Rooms.
- All users must belong to an Organization Unit.
- Now you can grant default security access to one of the following:
  - Author-only
  - Organization unit-only
  - Public access

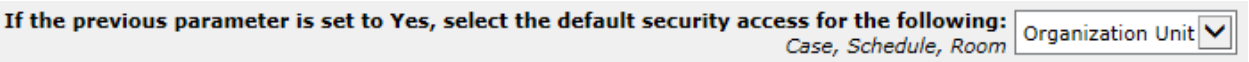
  This allows access to any **NEW** Cases & Scenarios, Sessions or Rooms that are created once user access security is enabled. (See the next Parameter)

- Security access to **EXISTING** Cases & Scenarios, Sessions or Rooms must be set. Complete the steps on the following pages to grant access.



3. Click **OK**.

2) Select the default security access



1. Now that user access security is enabled, select one of the following next to the **If the previous parameter is set to Yes, select the default security access for the following: Case, Session, Room** parameter to grant access to one of the following:

Security Access	Description
Author-only	Can only be accessed only by the user who created either the case or scenario, session, or room.
Organization Unit	Can be accessed by all users who belong to the selected organization unit.
Public	All organization units can access.

Note: This parameter is used to allow access to any **NEW** Cases & Scenarios, Sessions or Rooms that are created. For example, when a new session is created, this determines who has access to the session by default.

Cases & Scenarios Access Restrictions

Applicable Screens

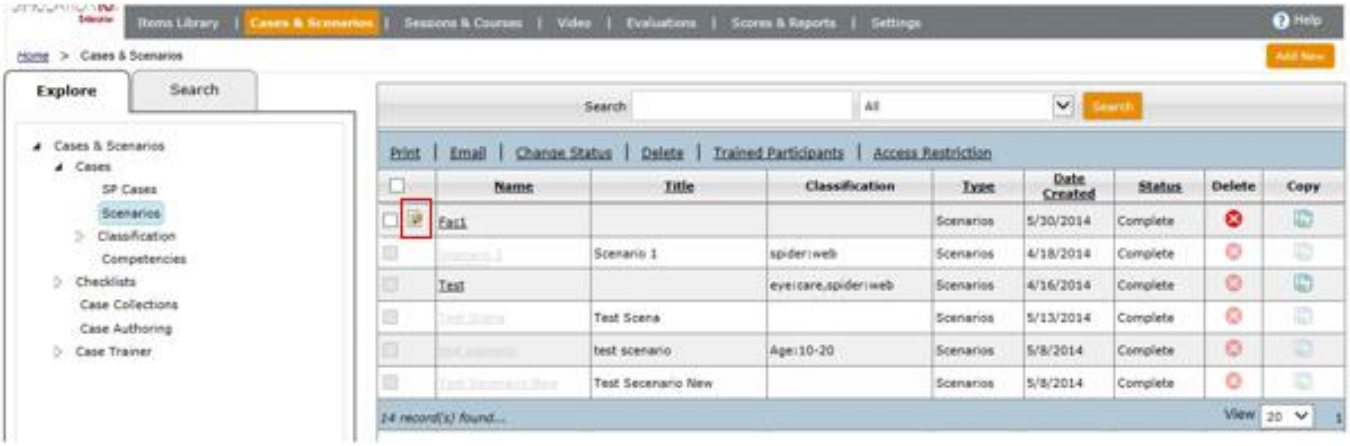
User access security applies to the following screens in Cases and Scenarios. Each area is defined on the following pages.

Cases & Scenarios screens	Description
Landing Page > SP Cases Landing Page > Scenarios	• Displays the cases or scenarios you have edit or read-only access to. • Enables you to grant Edit or Read-only access to one or more Cases and Scenarios.
Toolbelt > Sessions	Displays the sessions you have edit or read-only access to.
Toolbelt > Access Restrictions	Click to grant edit or read-only access.
Case or Scenario activity page > Follow-up	Only the cases and scenarios you have access to based on your security access restrictions appear.
Case Collection	Only the cases you have access to based on your security access restrictions appear.
Case Trainer	Only the cases you have access to based on your security access restrictions appear.

IMPORTANT! All drop-down fields throughout the application where the Case or Scenario can be selected will only display the Cases or Scenarios that the user has been granted access to view or edit.

Landing Page Security Access

The Cases and Scenarios Landing Pages display the following security access restrictions:



Editable cases and scenarios appear as follows:

- An edit icon appears next to the name of the cases and scenarios you can edit based on your security access, such as author-only access.
- Print, Email, Change Status, Delete, Trained Participants, and Access Restriction links are only available for editable Cases or Scenarios.

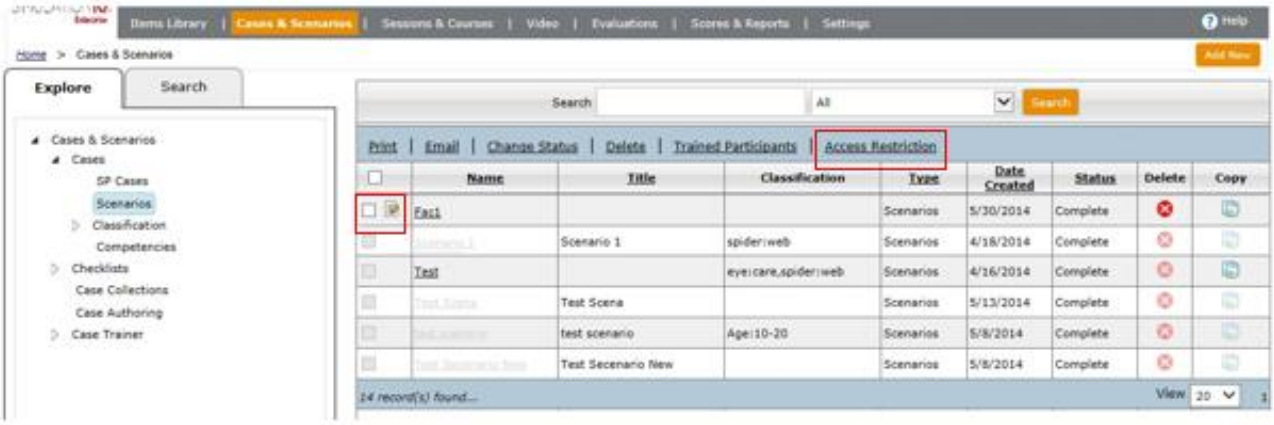
Read-only cases and scenarios appear as follows:

- Checkboxes are greyed out.
- The Delete and Copy functions are greyed out.
  Note: Depending on your browser, the case or scenario may not be greyed out but a mouse-over message may appear instead.

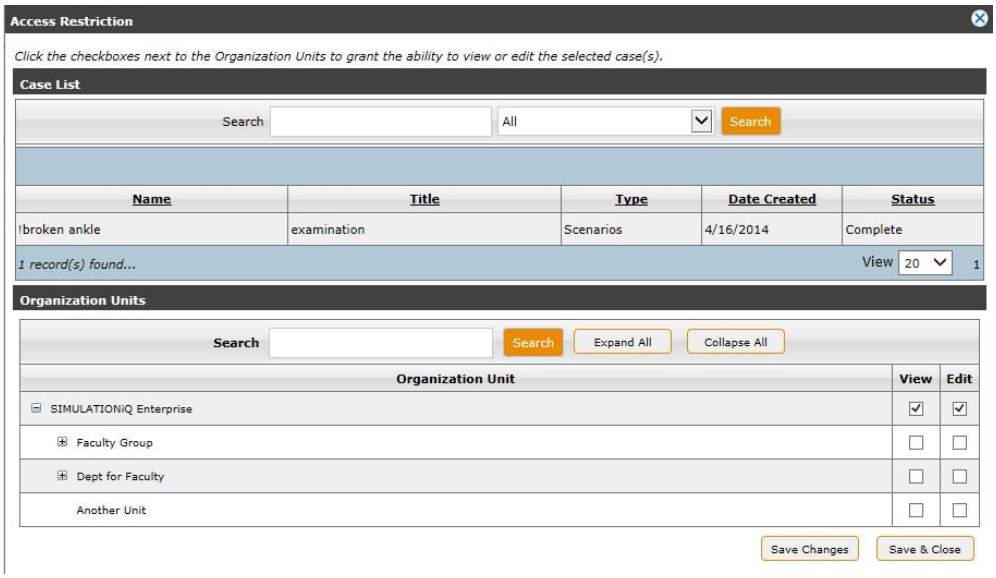
No access

- Case and Scenario checkbox and name is greyed out.

Grant Edit or Read-only access to one or more Cases and Scenarios from the Landing Page



1. Click the checkbox(es) next to the Case or Scenario you wish to grant edit or read-only access to.
2. Click the **Access Restriction** link at the top of the grid. The **Access Restriction** pop-up appears.

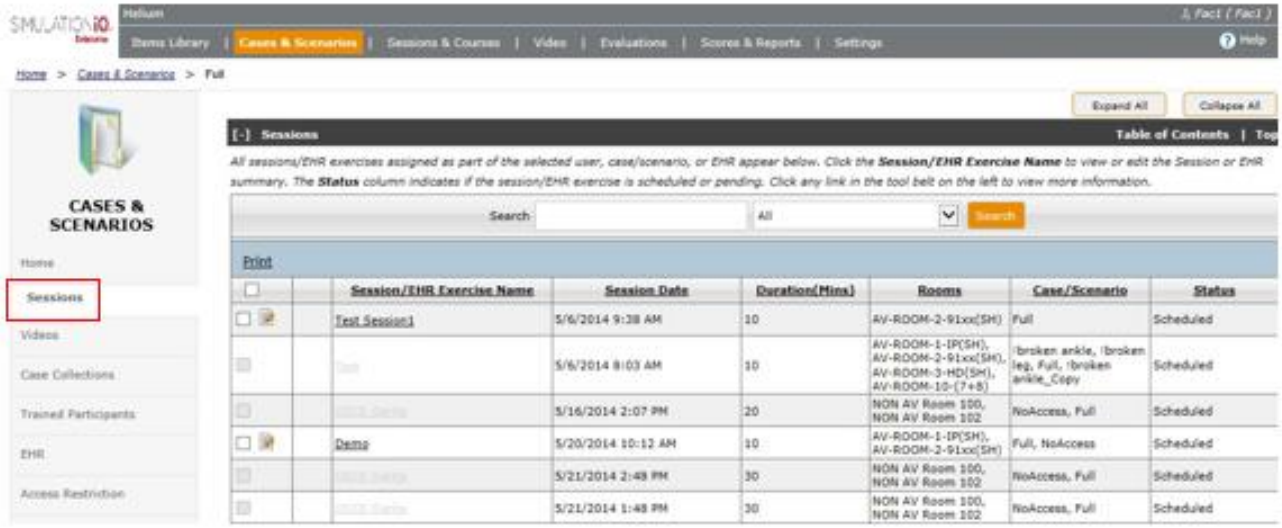


3. Click the checkboxes next to each Organization Unit as defined below and then click **Save & Close**.

Checkbox	Description
View	Grants ability to view the activity page and make no changes (read only).
Edit	User has full access to edit the session. The user may be limited to the cases, scenarios and rooms they can access based on their security access restrictions.

Sessions in Toolbelt for Case or Scenario

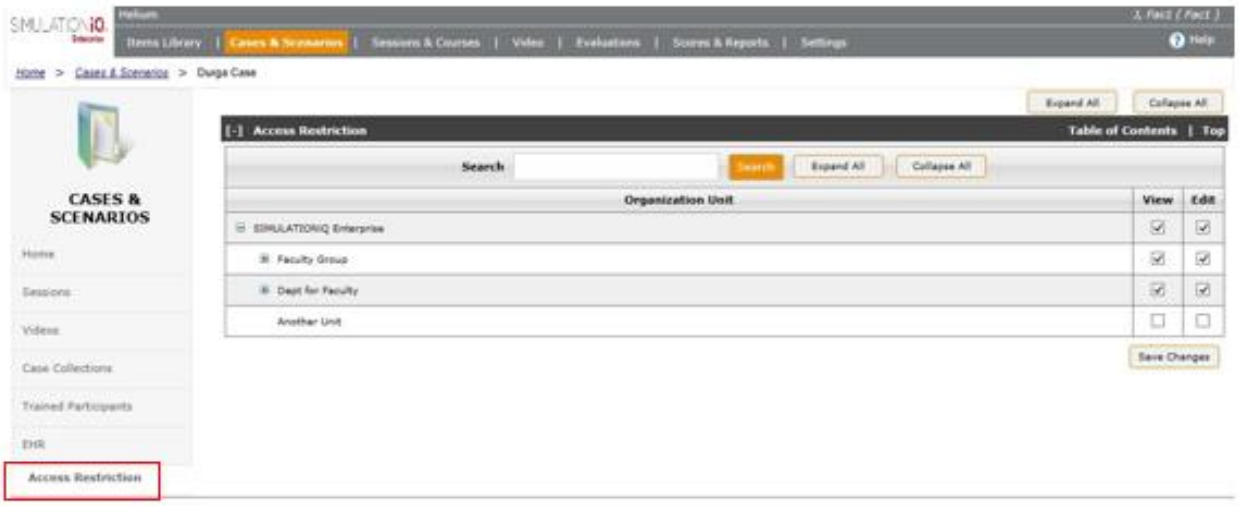
The **Sessions** link in the Toolbelt of the selected Case or Scenario displays the following security access restrictions:



Editable sessions are enabled and non-editable screens are greyed out. ***Note***: Depending on your browser, the case/session/room/function may not be greyed out but a mouse-over message may appear instead.

Access Restrictions in the Case or Scenario Toolbelt

Click the **Access Restrictions** link in the Toolbelt of the selected Case or Scenario to grant edit or read-only access.

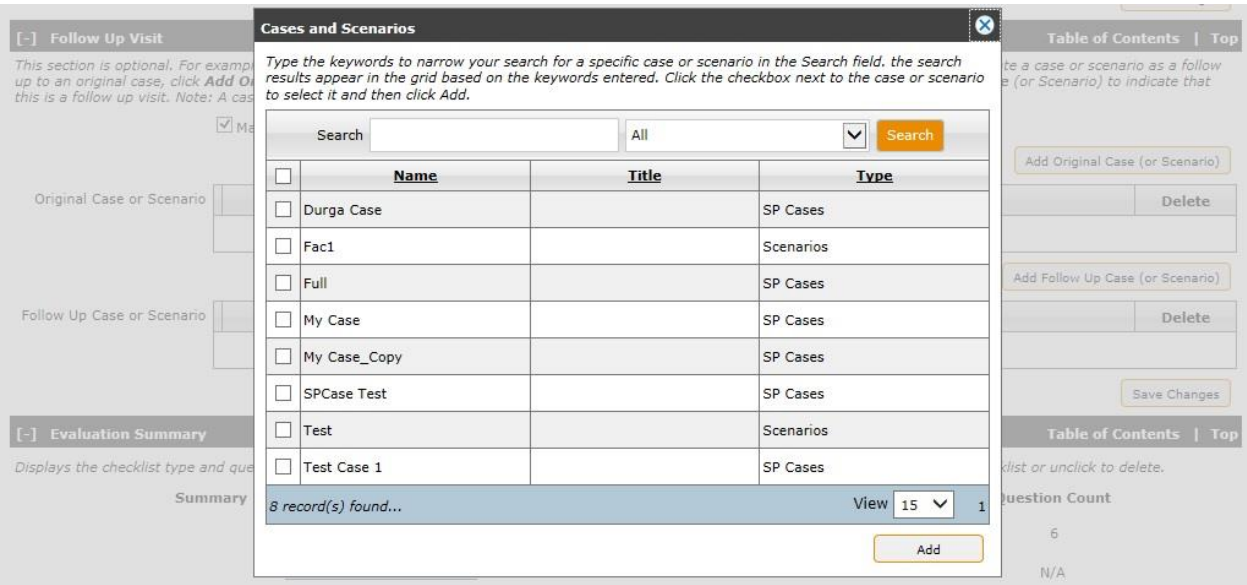


1. Click the checkboxes next to each Organization Unit as defined below and then click **Save Changes**.

Checkbox	Description
View	Grants ability to view the activity page and make no changes (read only).
Edit	User has full access to edit the session. The user may be limited to the cases, scenarios and rooms they can access based on their security access restrictions.

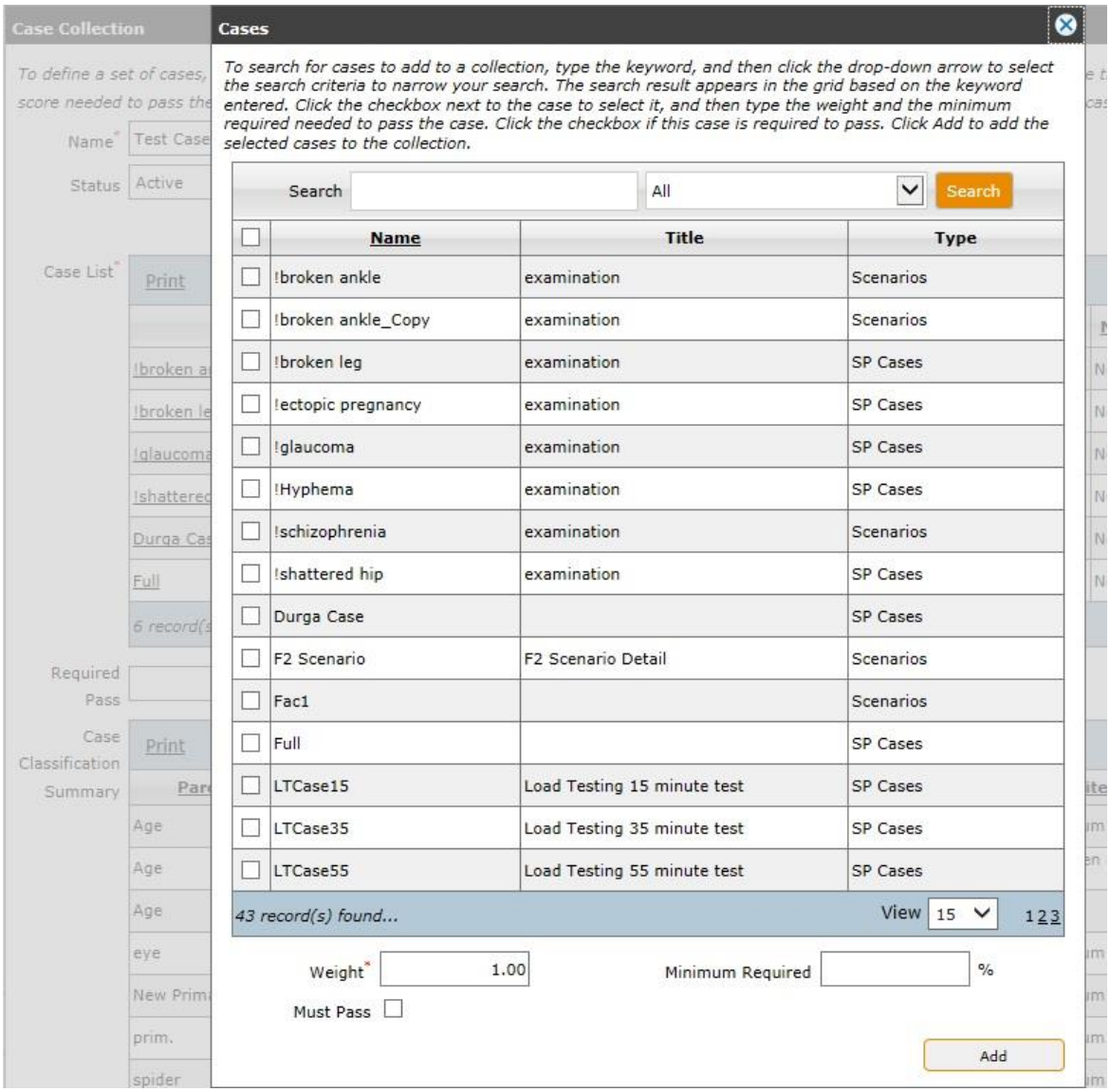
Add Follow-up Visit for Case or Scenario

When adding a follow-up visit to a case or scenario, only the cases and scenarios you have access to based on your security access restrictions appear in the pop-up window.



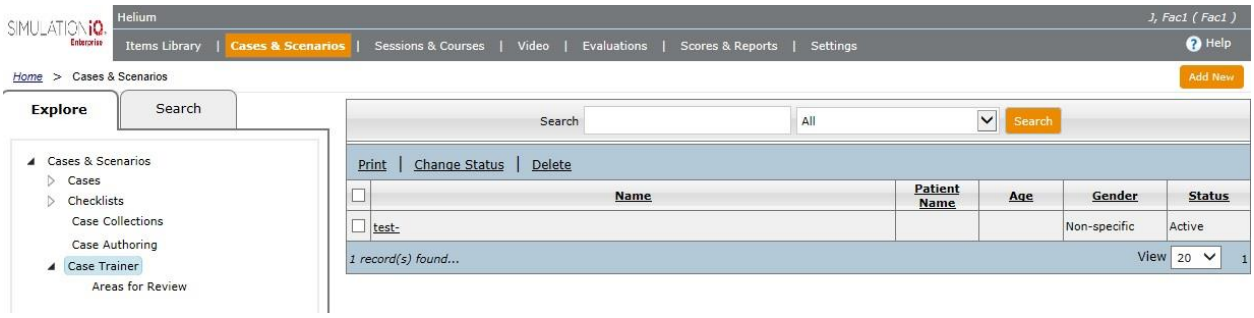
Add Case to Case Collection

When adding a case to a case collection, only the cases you have access to based on your security access restrictions appear in the pop-window.



Case List in Case Trainer

When adding a case to Case Trainer, only the cases you have access to based on your security access restrictions appear in the pop-window.



Session Access Permissions

Applicable Screens

User access security applies to the following screens in Sessions & Courses:

IMPORTANT!

- Session creator always has full access to the session he or she created.
- If you have edit access to a session but do not have access to a case, you will not have access to the case within the session (including scoring and reporting), but you may change the evaluator for the case.
- If you create a session for automatic recording but choose a room you do not have record access to, the automatic recording will not be compromised.

Session screens	Description
Calendar	• The View drop-down will only show the Rooms and Cases/Scenarios that you can view or edit. • You can view the Session Summary when you select the session. • If you do not have access to view the session, then the Show Details button does not appear.
Landing Page > Sessions & Courses	• Displays the sessions you have edit or read-only access to. • Enables you to grant Edit or Read-only access to one or more Sessions.

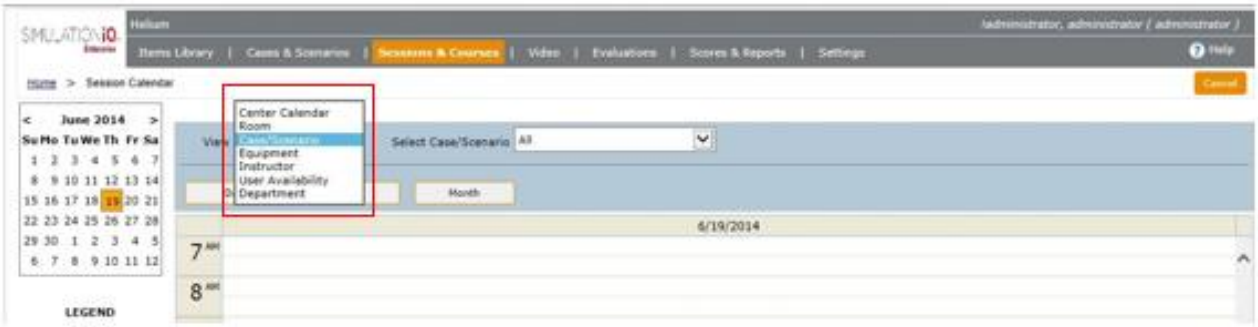
Session screens	Description
Copy session	You cannot copy a session if you do not have read-access to one or more **Cases or Rooms** in the original session.
Toolbelt > Monitor Session	You can view the Case/Scenario Summary when you select the case: ▪ If you have access to View/Edit the case/scenario, then the Show Details button appears. ▪ If you do not have access to View the case/scenario, then the Show Details button does not appear.
Toolbelt > Scoring Properties	• Case drop-down only contains the cases you have access to.
Toolbelt > Access Restrictions	Click to grant edit or read-only access.
Toolbelt > Practice Responses	• You only have access to view the practice responses if you have view/edit access to the case. • You only have access to view the practice responses if you are an evaluator of that Session. • Administrator can edit any evaluation.
Toolbelt > Edit Responses	• You only have access to view the evaluation if you have view/edit to the case. • You only have access to edit the evaluation if you are an evaluator of that case in the Session. • Administrator can edit any evaluation.
Advanced View	• Contains the cases/scenarios you have access to view/edit. • Contains the rooms you have access to view/edit.
Session activity page > Case List and Equipment	• Case list will only contain the cases you have access to view/edit. • If you do not have access to the room and the room is already scheduled, you are not able to change or modify that room.
Evaluation > Checklist with Live Video	• If you are an evaluator of the case within a session then you will have access to view the checklist
Evaluation > Checklist in Edit mode	• You only have access to view the evaluation if you have view/edit access to the case • You only have access to edit the evaluation if you are an evaluator of that case in the Session. • Administrator has access to edit any evaluation
Evaluation > Checklist in Score mode	• You only have access to view the evaluation if you have view/edit access to the case

Session screens	Description
	▪ You only have access to edit the evaluation if you are an evaluator of that case in the Session. ▪ Administrator has access to edit any evaluation

IMPORTANT! All Session drop-down fields throughout the application will only display the Sessions that you have been granted access to view or edit.

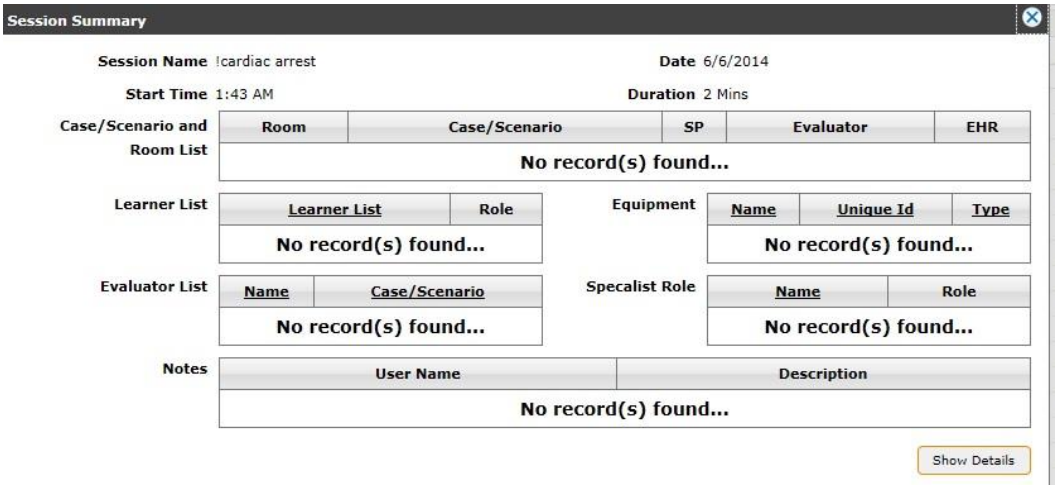
Calendar

View



The View drop-down will only show the Rooms and Cases/Scenarios that you can view or edit.

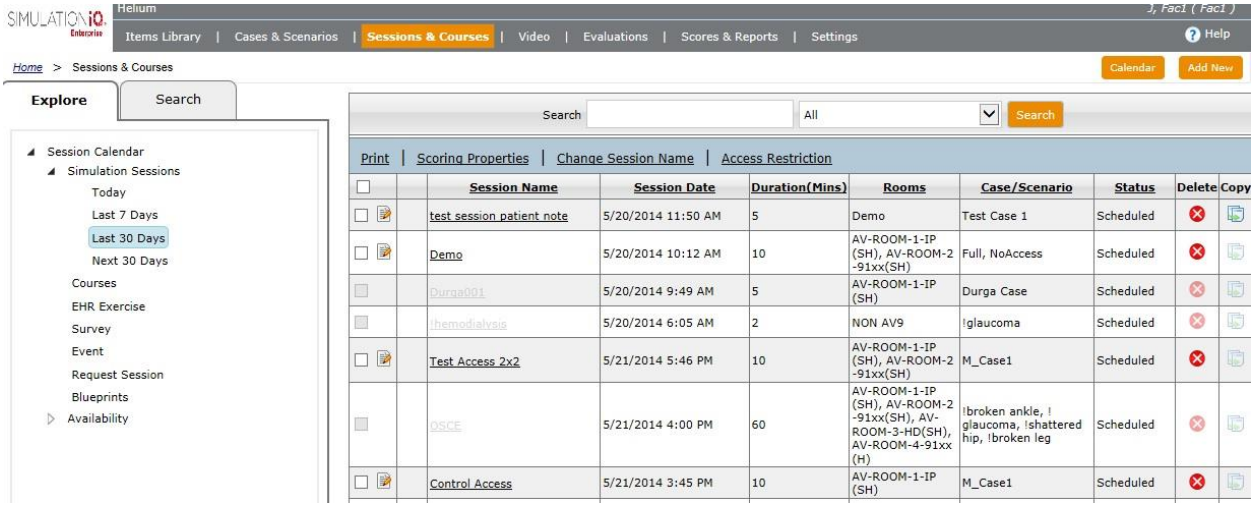
Session Summary



- You can view the Session Summary when you select the session.
- If you do not have access to View the session, then the Show Details button does not appear.

Landing Page security access

The Session Landing Page displays the following security access restrictions:



Editable Sessions appear as follows:

- An edit icon appears next to the name of the session you can edit based on your security access, such as author-only access.
- Print, Scoring Properties, Change Session Name, and Access Restriction links are only available for editable Sessions.

Read-only Sessions appear as follows:

- Checkboxes are greyed out.
- The Delete and Copy functions are greyed out.
  Note: Depending on your browser, the session may not be greyed out but a mouse-over message may appear instead.

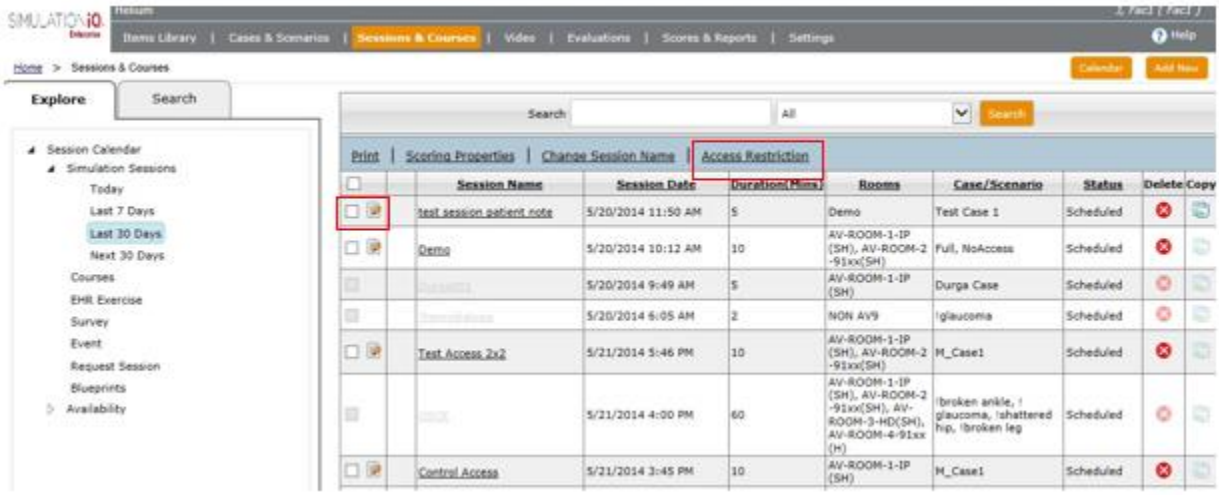
No access

- Case and Scenario checkbox and name is greyed out.

Copy Session

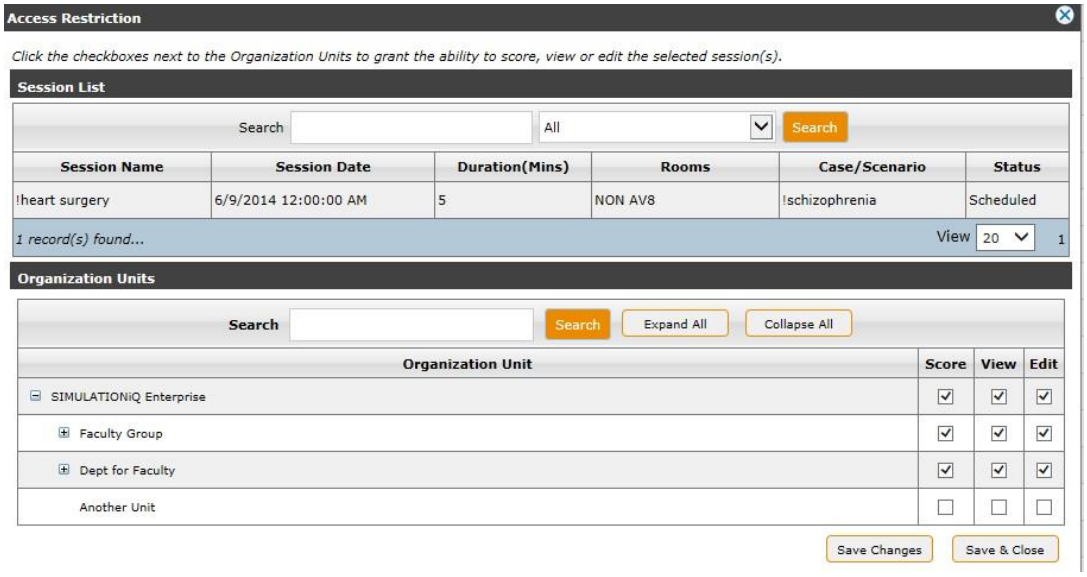
You cannot copy a session when you do not have read-access to one or more **Cases or Rooms** in the original session.

Grant Edit or Read-only access to one or more Sessions from the Landing Page



1. Click the checkbox(es) next to the Session(s) you wish to grant **edit** or **read-only** access to.

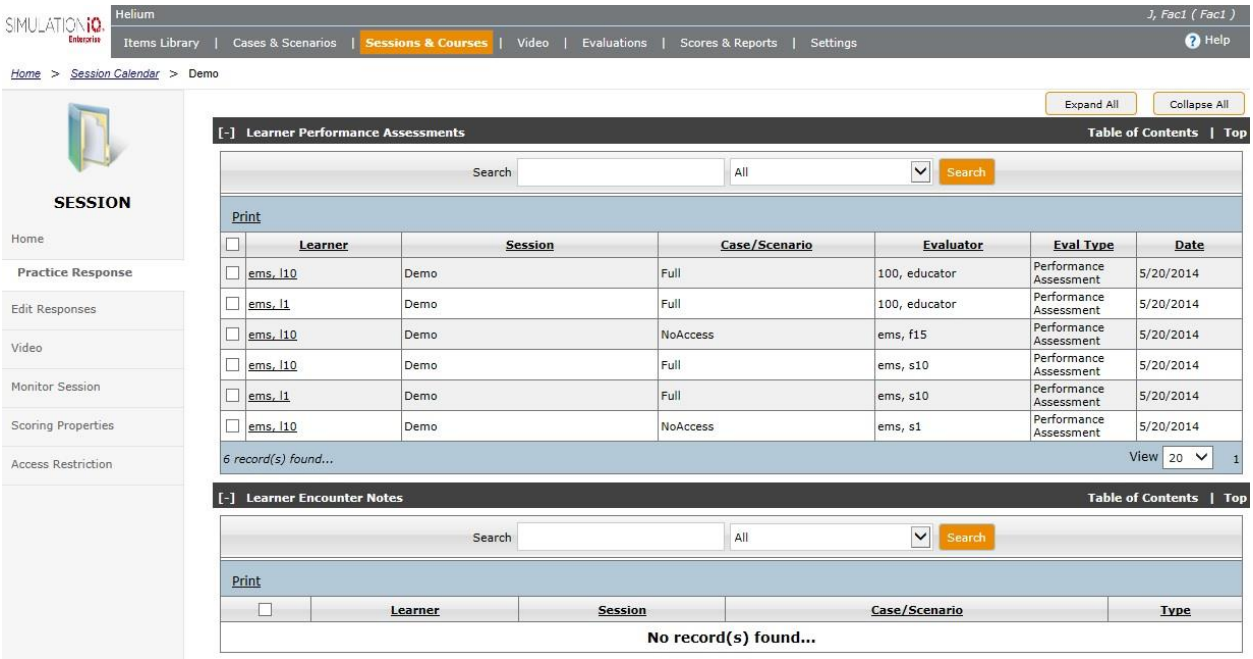
2. Click the **Access Restriction** link at the top of the grid. The **Access Restriction** pop-up appears.



3. Click the checkboxes next to each Organization Unit as defined below and then click **Save & Close**.

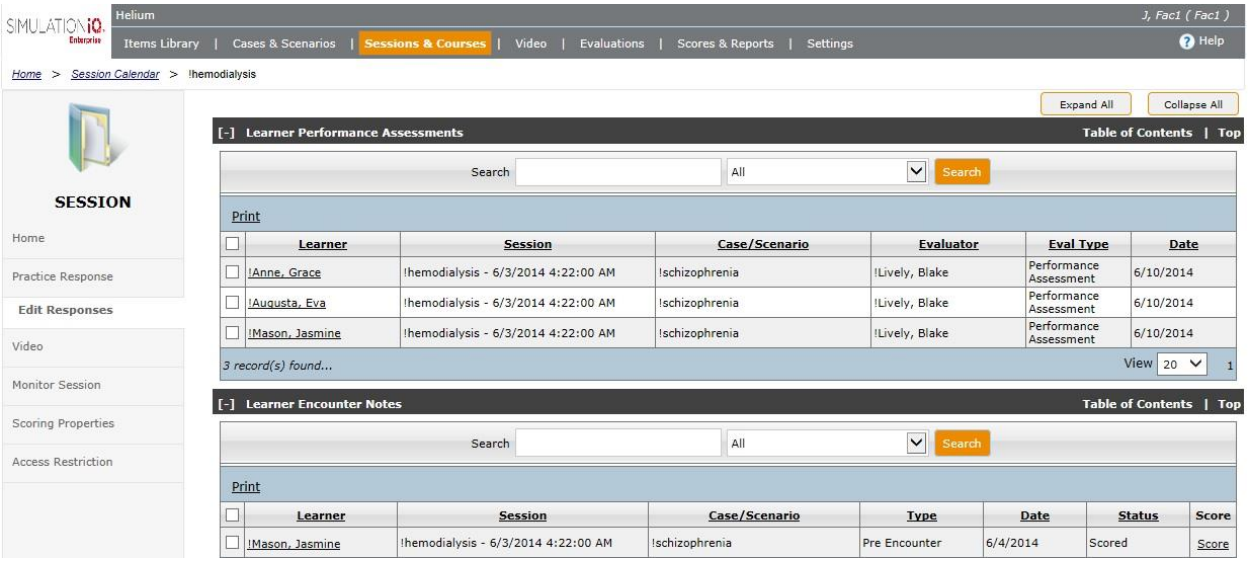
Checkbox	Description
View	Grants ability to view the activity page and make no changes (read only).
Edit	Full access to edit the session. You may be limited to the cases, scenarios and rooms you can access based on your security access restrictions.
Score	This will allow the session to appear in the Session filter in Scores and Reports. View is enabled when Score is selected. Statistics are not affected.

Practice Response in Session Toolbelt



- You only have access to view the practice responses if you have view/edit access to the case.
- You only have access to view the practice responses if you are an evaluator of that Session.
- Administrator has access to edit any evaluation.

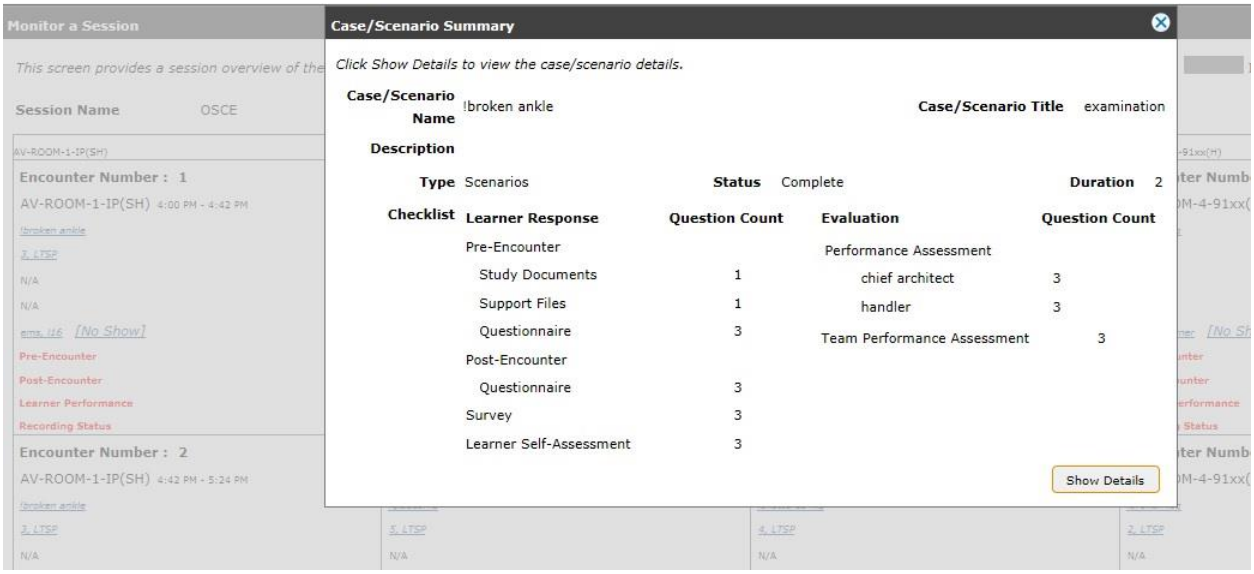
Edit Responses in Session Toolbelt



- You only have access to view the evaluation if you have view/edit to the case.
- You only have access to edit the evaluation if you are an evaluator of that case in the Session.
- Administrator has access to edit any evaluation.

Monitor Session in Session Toolbelt

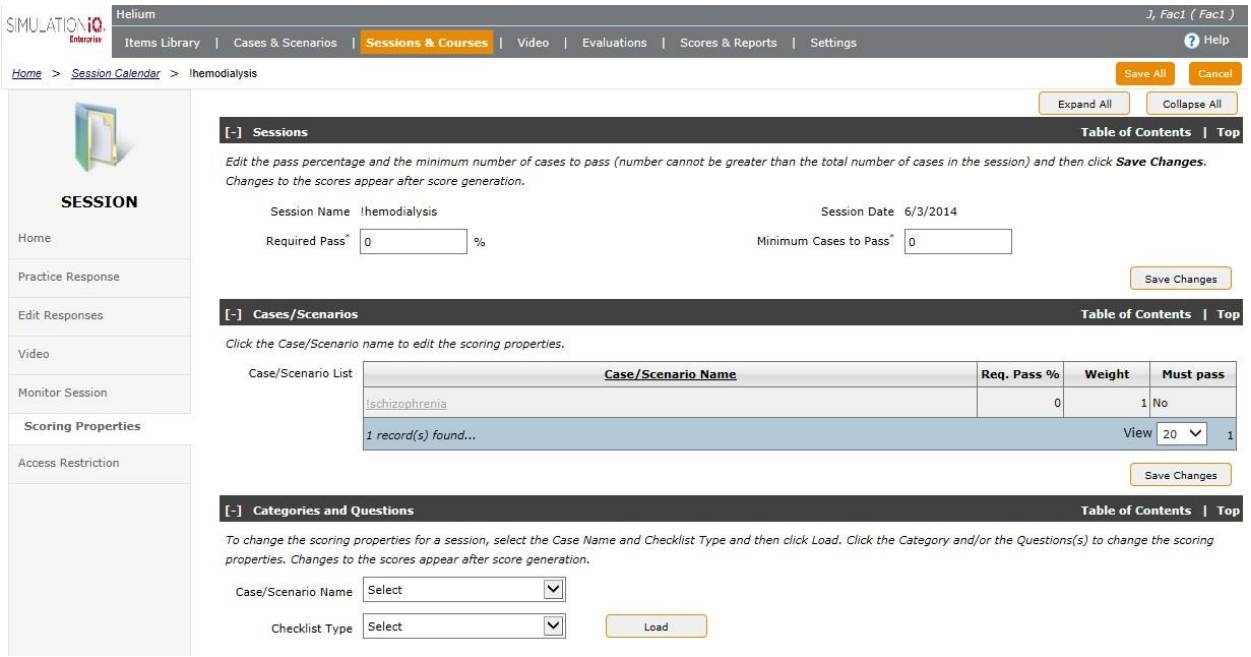
The **Monitor Session** link in the Toolbelt of the selected Session displays the following security access restrictions:



You can view the Case/Scenario Summary when you select the case:

- If you have access to View/Edit the case/scenario, then the Show Details button appears.
- If you do not have access to View the case/scenario, then the Show Details button does not appear.

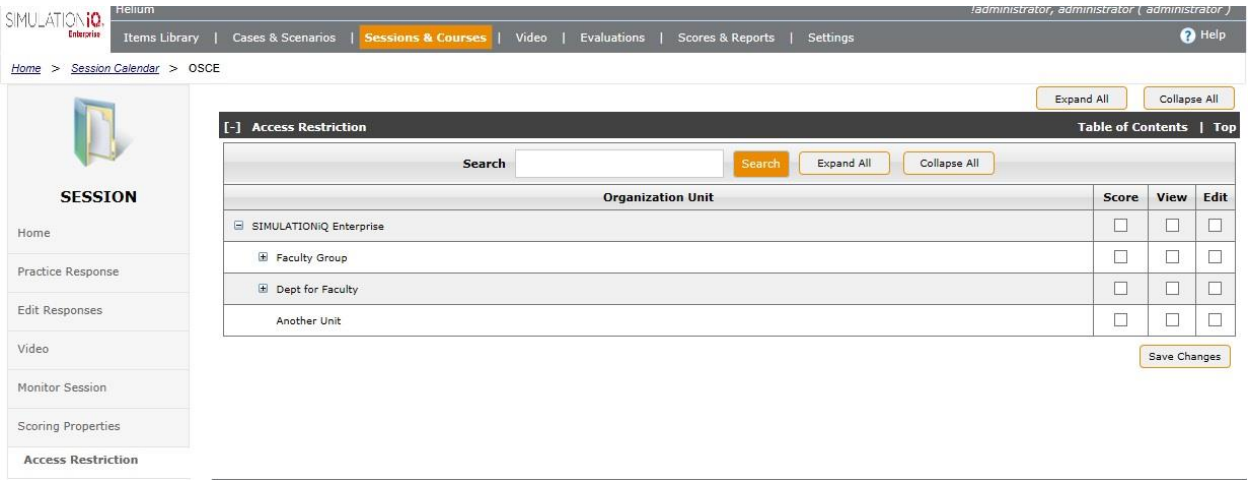
Scoring Properties in Toolbelt



Case drop-down only contains the cases you have access to.

Access Restrictions in the Session Toolbelt

Click the **Access Restrictions** link in the Toolbelt of the selected Session to grant edit or read-only access.

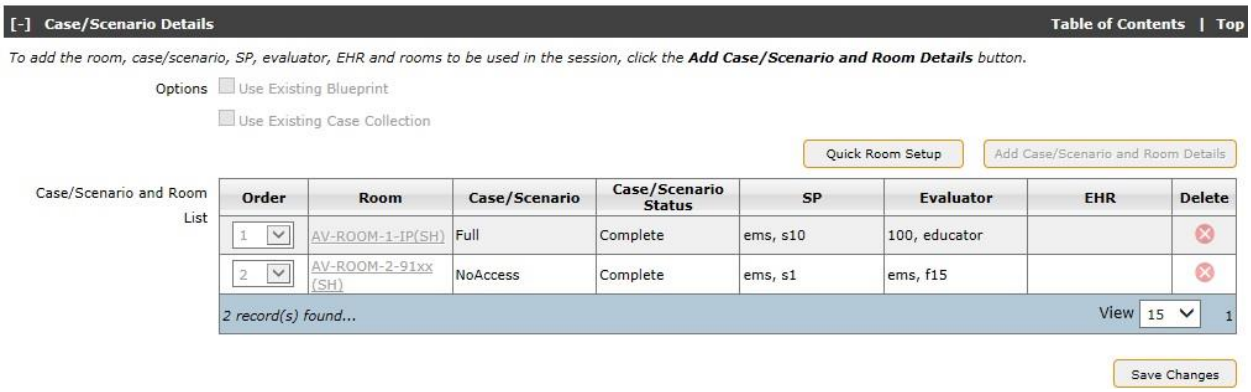


1. Click the checkboxes next to each Organization Unit as defined below and then click **Save Changes**.

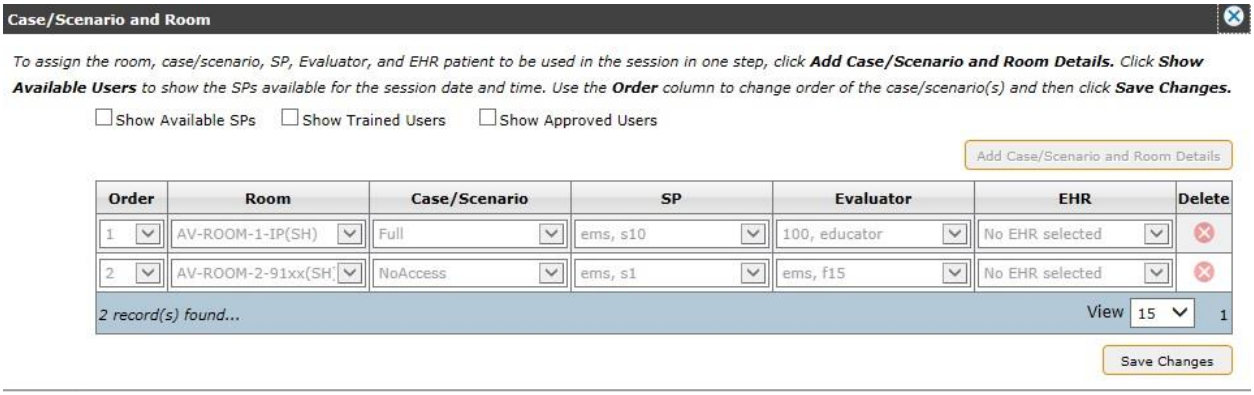
Checkbox	Description

View	Grants ability to view the activity page and make no changes (read only).
Edit	You have full access to edit the session. You may be limited to the cases, scenarios and rooms you can access based on your security access restrictions.

Session Activity Page > Case/Scenario Details



The Case/Scenario and Details screen only contains the cases/scenarios and rooms that you have access to view/edit.



If you do not have access to the room or if the room is already scheduled, you cannot access that room.

Room Access Permissions

Applicable Screens

User access security applies to the following areas in **Settings > Rooms**:

IMPORTANT! The changes you make to **Settings > Rooms** affects the following functions in AV Viewer and AV Control. *See* AV Access Permissions *for more information.*

Access Restrictions

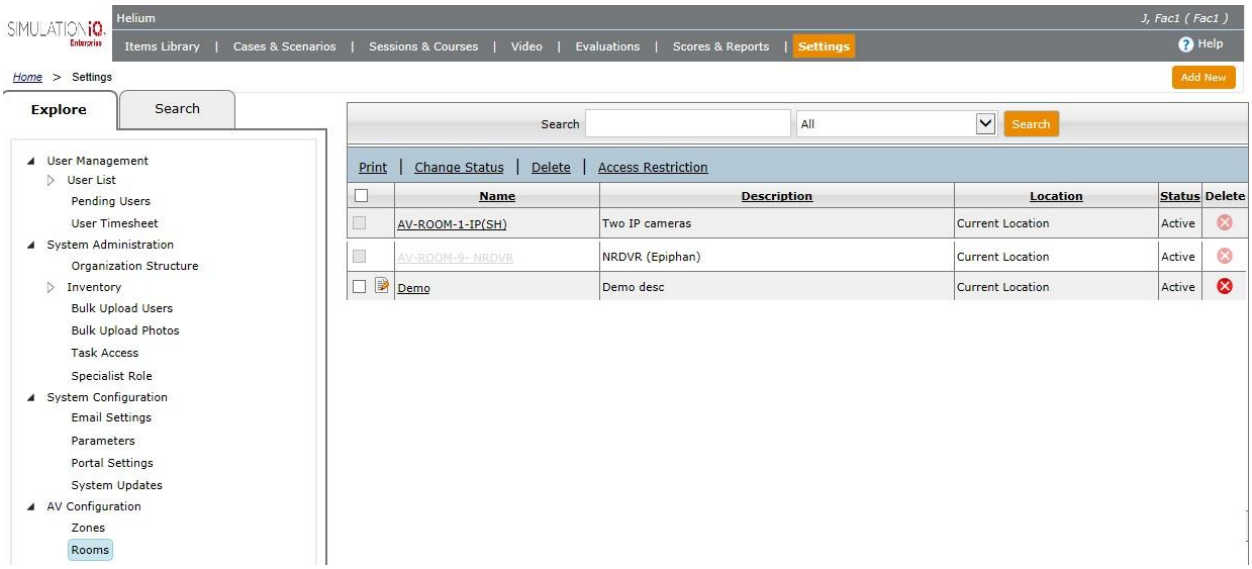
Live	Grants ability to view live video
Record	Grants ability to view recorded video
Control	Grants ability to control the cameras
Session	Grants ability to view/edit session information
View	Grants view only access to the room
Edit	Grants ability to edit the room details

Room screens	Description
Landing Page > Rooms	• Displays the rooms you have edit or read-only access to. • Enables you to grant Edit or Read-only access to one or more rooms.
Toolbelt > Access Restrictions	Click to grant edit or read-only access.

Each area is defined below.

Landing Page Security Access

The Rooms Landing Page displays the following security access restrictions:



Editable rooms appear as follows:

- An edit icon appears next to the name of the room you can edit based on your user security access.
- Print, Change Status, Delete, and Access Restriction links are only available for editable Rooms.

Read-only Rooms appear as follows:

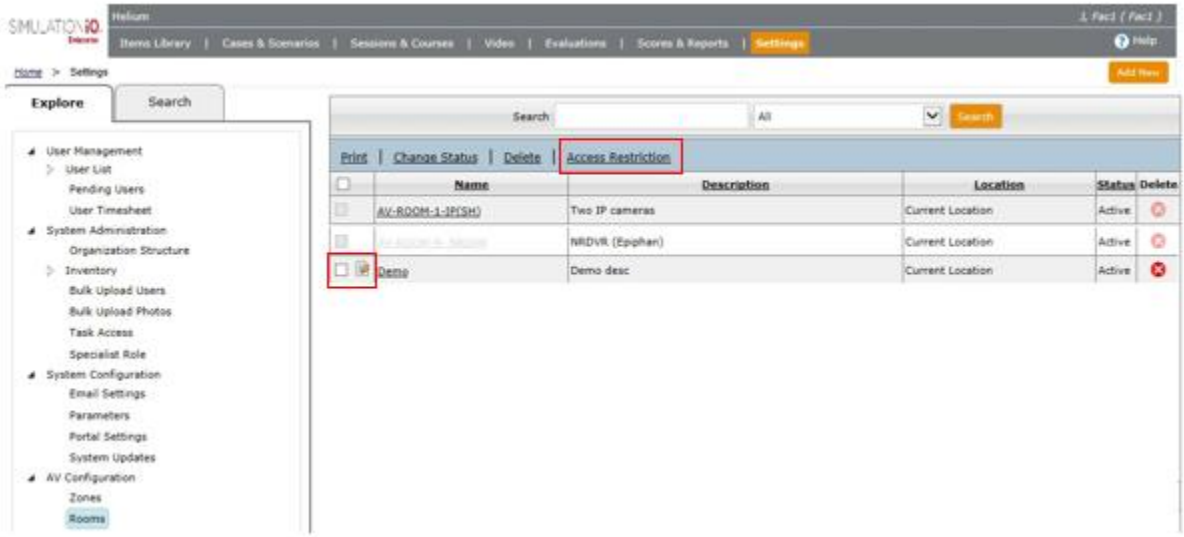
- Checkboxes are greyed out.
- The Delete function is greyed out.

Note: Depending on your browser, the room may not be greyed out but a mouse-over message may appear instead.

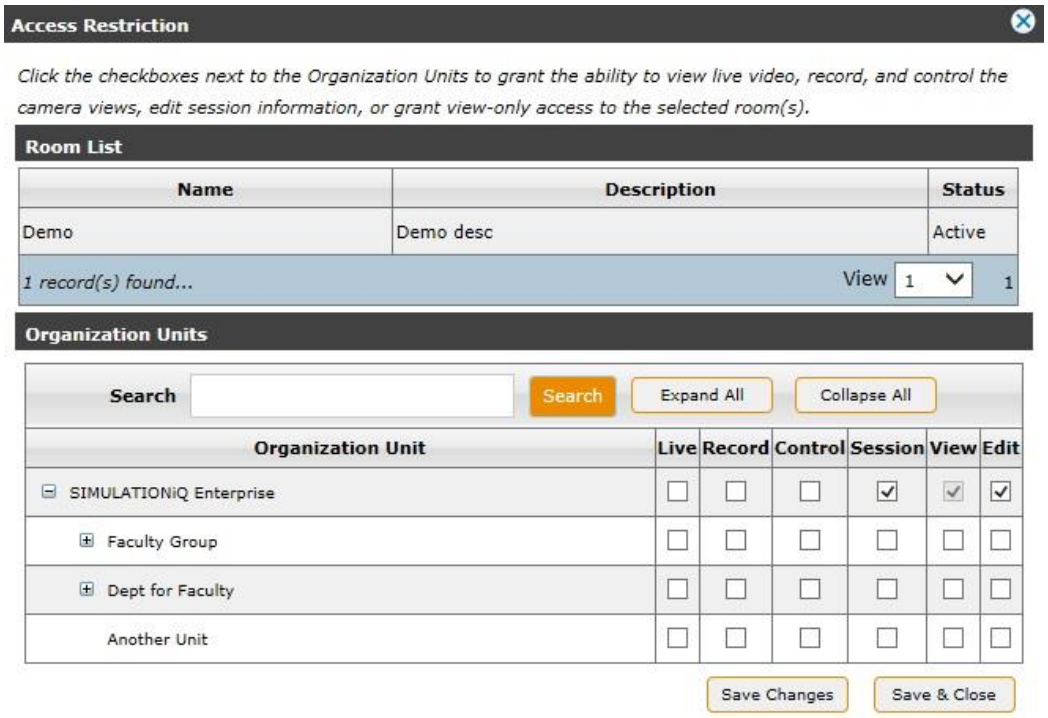
No access

- Room checkbox and name is greyed out.

Grant Edit or Read-only access to one or more Rooms from the Landing Page



1. Click the checkbox(es) next to the Room(s) you wish to grant **edit** or **read-only** access to.
2. Click the **Access Restriction** link at the top of the grid. The **Access Restriction** pop-up appears.

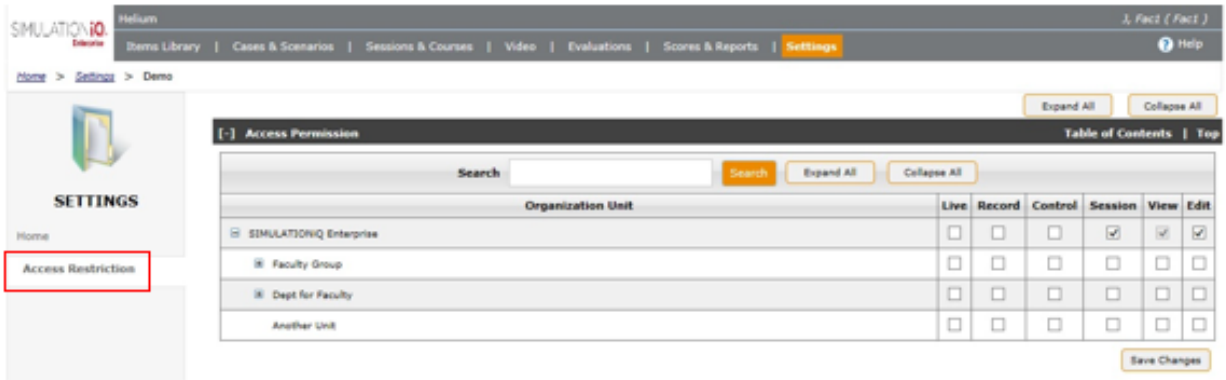


3. Click the checkboxes as defined below and then click **Save & Close**.

Checkbox	Description
Live	Grants the ability to view live video for this room. ***Note:*** Clicking Live automatically enables the Session and View checkboxes, and you can remove any checkmarks that are automatically checked.
Record	Grants the ability to record video in this room. ***Note:*** Clicking Record automatically enables the Live, Session and View checkboxes, and you can remove any checkmarks that are automatically checked.
Control	Grants the ability to control the cameras for this room. ***Note:*** Clicking Control automatically enables the Live, Record, Session and View checkboxes, and you can remove any checkmarks that are automatically checked.
Session	Grants the ability to edit the session information. ***Note:*** Clicking Session automatically enables the View checkboxes, and you can remove any checkmarks that are automatically checked.
View	Grants read-only access.
Edit	Grants the ability to edit the room details, video inputs, simulators and human interface devices mapped to the room. ***Note:*** Clicking Edit automatically enables the Session and View checkboxes, and you can remove any checkmarks that are automatically checked.

Access Restrictions in the Room Toolbelt

Click the **Access Restrictions** link in the Toolbelt of the selected Room to grant access as defined below:



1. Click the checkboxes as defined below and then click **Save & Close**.

Checkbox	Description
Live	Grants the ability to view live video for this room. ***Note:*** Clicking Live automatically enables the Session and View checkboxes, and you can remove any checkmarks that are automatically checked.
Record	Grants the ability to record live video in this room. ***Note:*** Clicking Record automatically enables the Live, Session and View checkboxes, and you can remove any checkmarks that are automatically checked.
Control	Grants the ability to control the cameras for this room. ***Note:*** Clicking Control automatically enables the Live, Record, Session and View checkboxes, and you can remove any checkmarks that are automatically checked.
Session	Grants the ability to edit the session information. ***Note:*** Clicking Session automatically enables the View checkboxes, and you can remove any checkmarks that are automatically checked.
View	Grants read-only access.
Edit	Grants the ability to edit the room details, video inputs, simulators and human interface devices mapped to the room. ***Note:*** Clicking Edit automatically enables the Session and View checkboxes, and you can remove any checkmarks that are automatically checked.

AV Access Permissions

Applicable Screens

User access security applies to the following areas in in AV Control and Viewer:

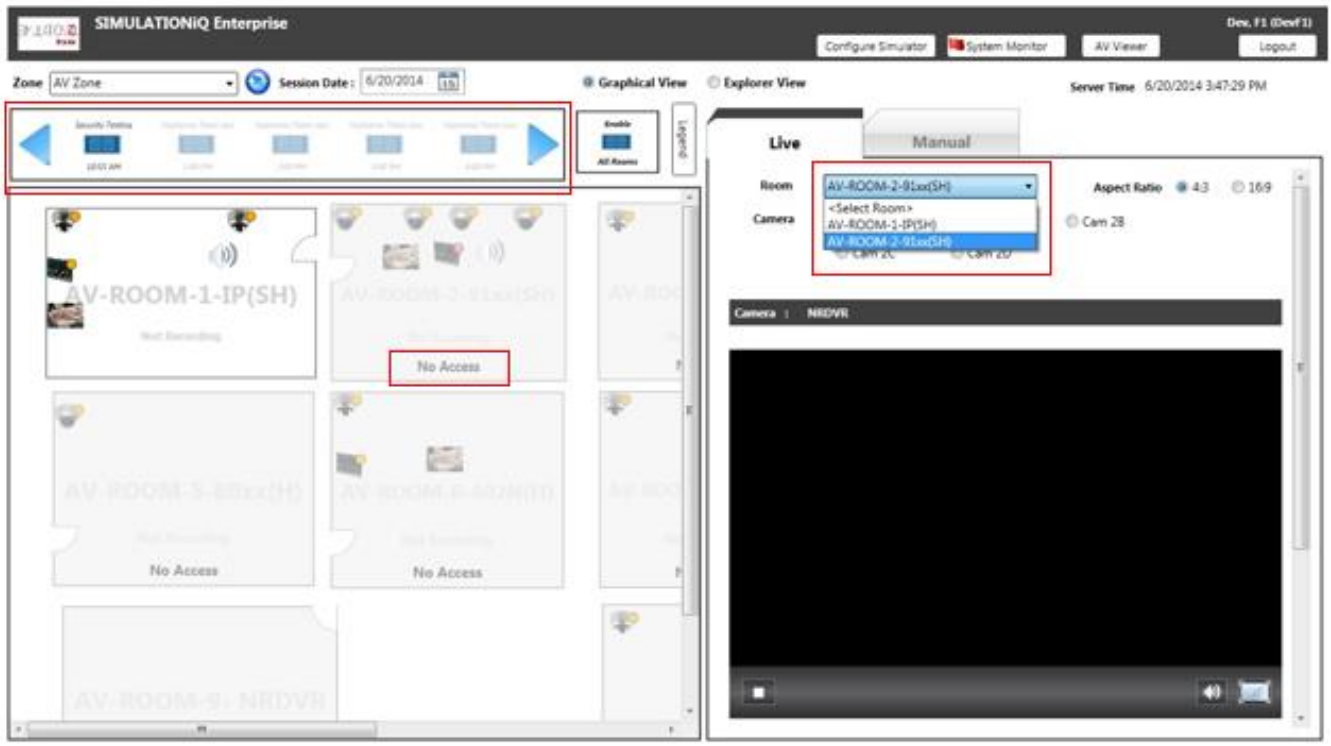
- Sessions: Displays the sessions you have access to.
- Rooms: Displays the rooms you have access to.

IMPORTANT! The security access restrictions made in **Settings > Rooms** affects the following functions in AV Viewer and AV Control:

- Live video
- Recorded video
- Camera control
- View/edit session
- View/edit room details

See Grant Edit or Read-Only Access to one or more Rooms from the Landing Page *for more information.*

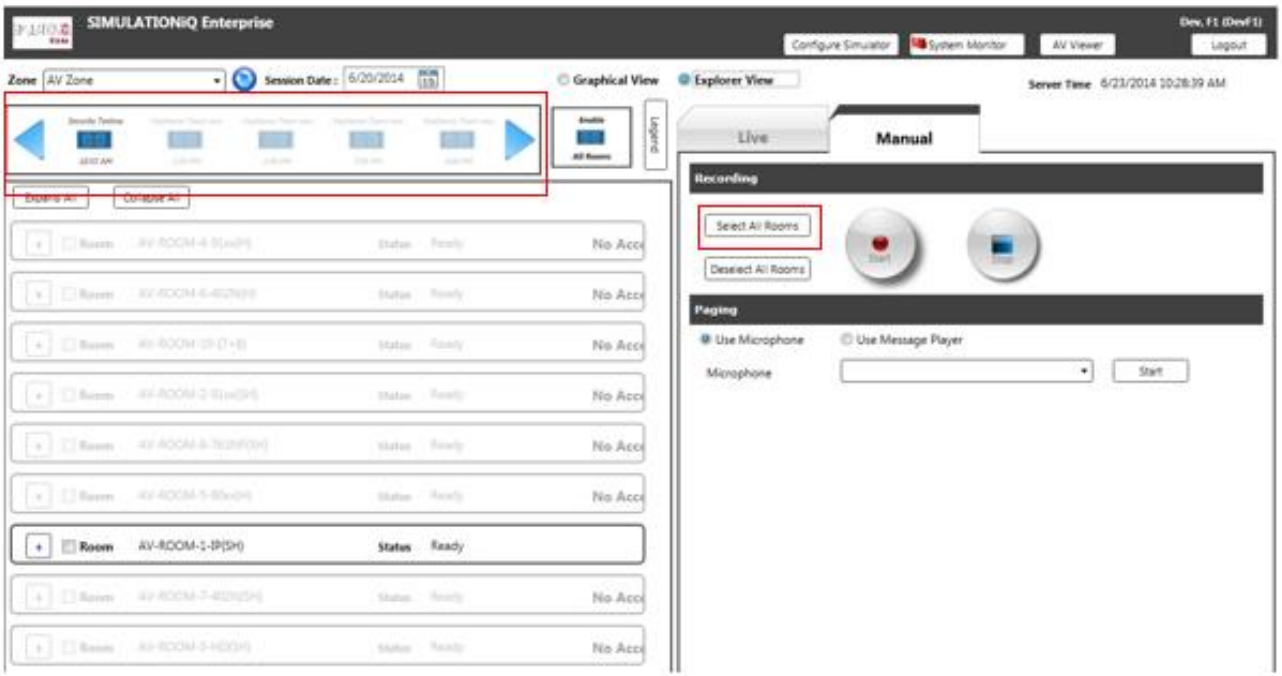
AV Control Graphical View



In Graphical View, only the sessions and rooms you have view/edit access to appear.

Note: **Enable All Rooms** only enables the rooms in which you have access to record.

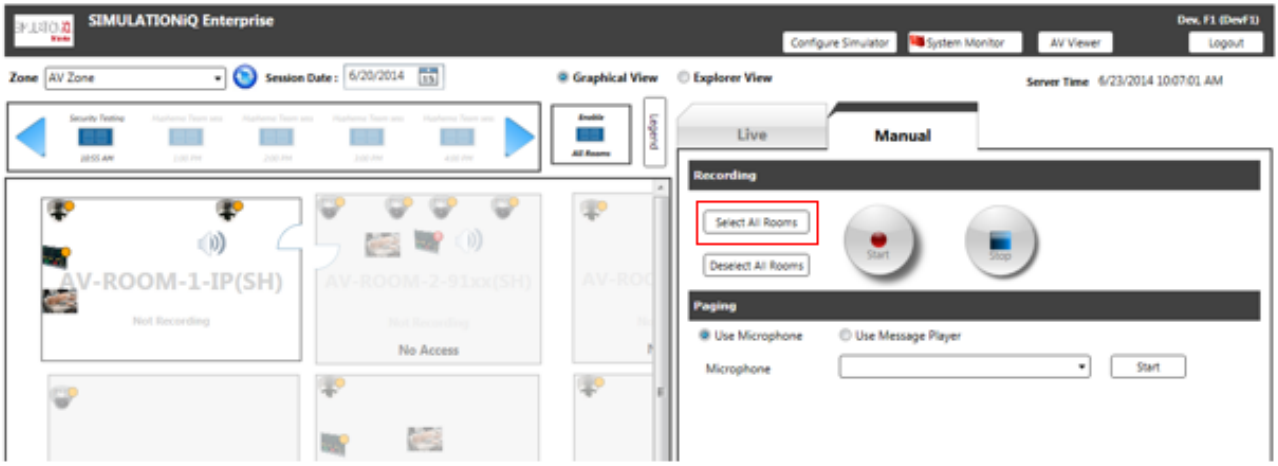
AV Control Explorer View



In Explorer View, only the sessions and rooms you have view/edit access to appear.

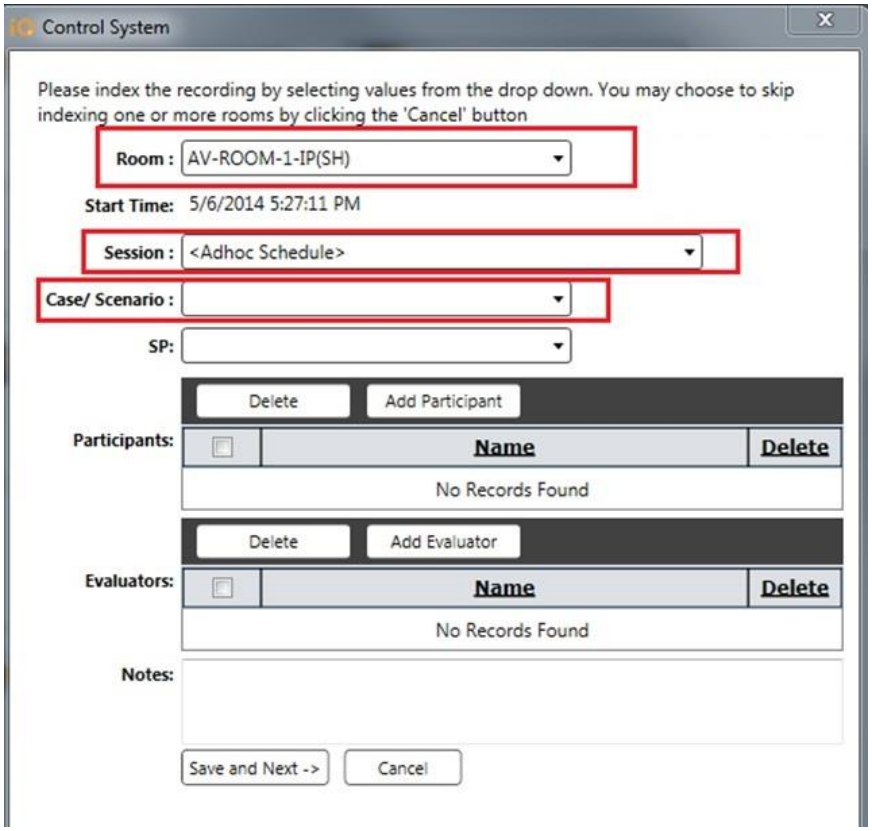
Note: **Enable All Rooms** only enables the rooms in which you have access to record.

AV Control Manual Mode Security Access



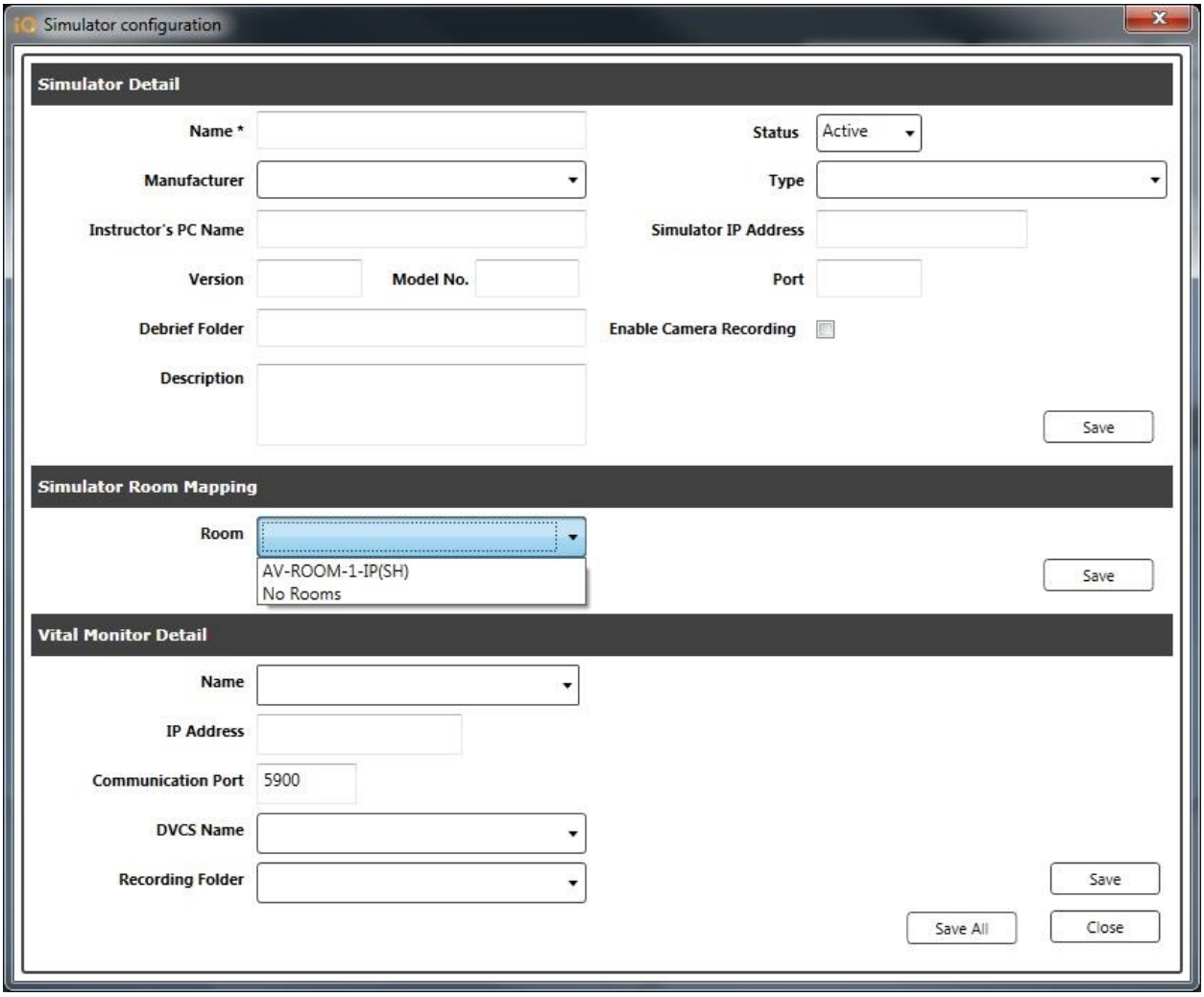
- In Manual mode, only the rooms you have view/edit access to appear.
- Paging is only applicable to the rooms you have access to view/edit.

AV Control Indexing Security Access



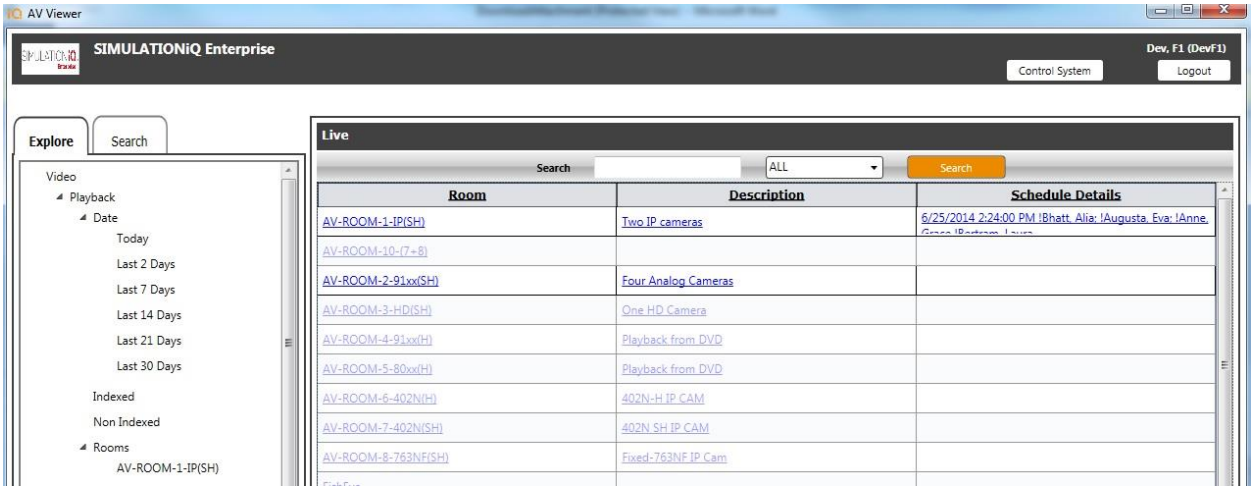
In AV Control, only the Rooms, Sessions and Cases/Scenarios that you have view/edit access to appear.

AV Control Simulator Configuration Security Access (where available)

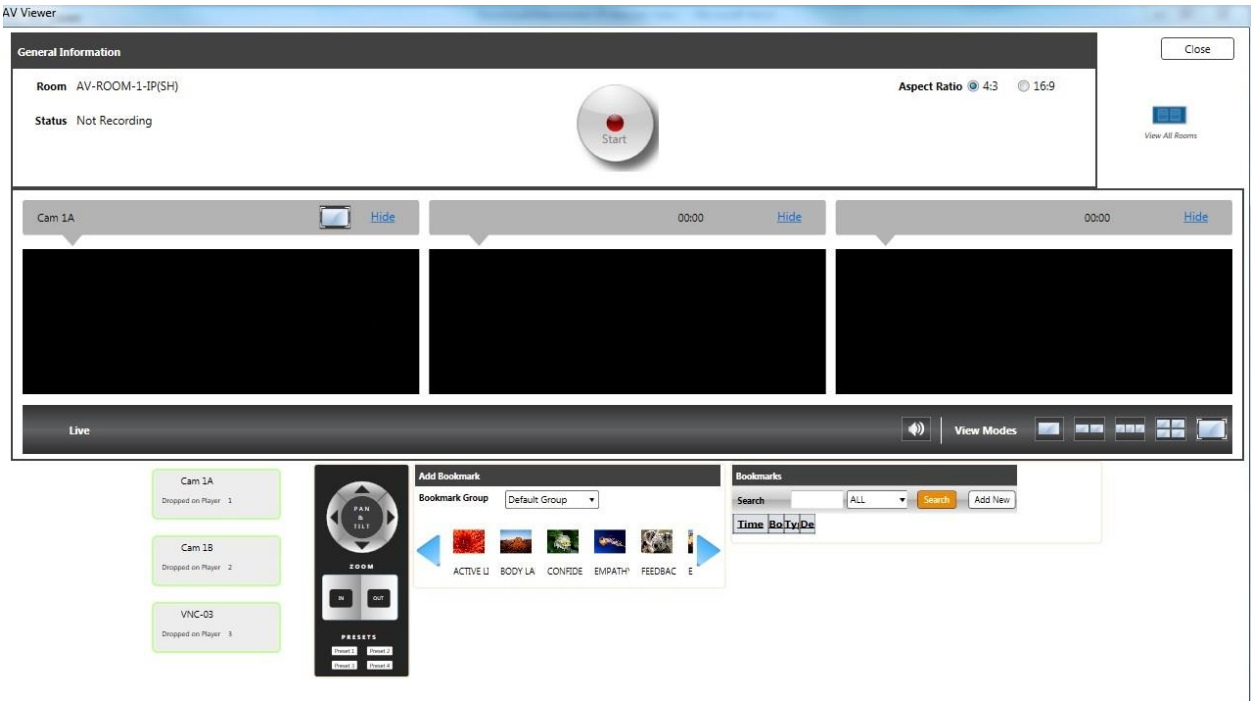


In the Simulator Configuration wizard, only the Rooms you have view/edit access to appear.

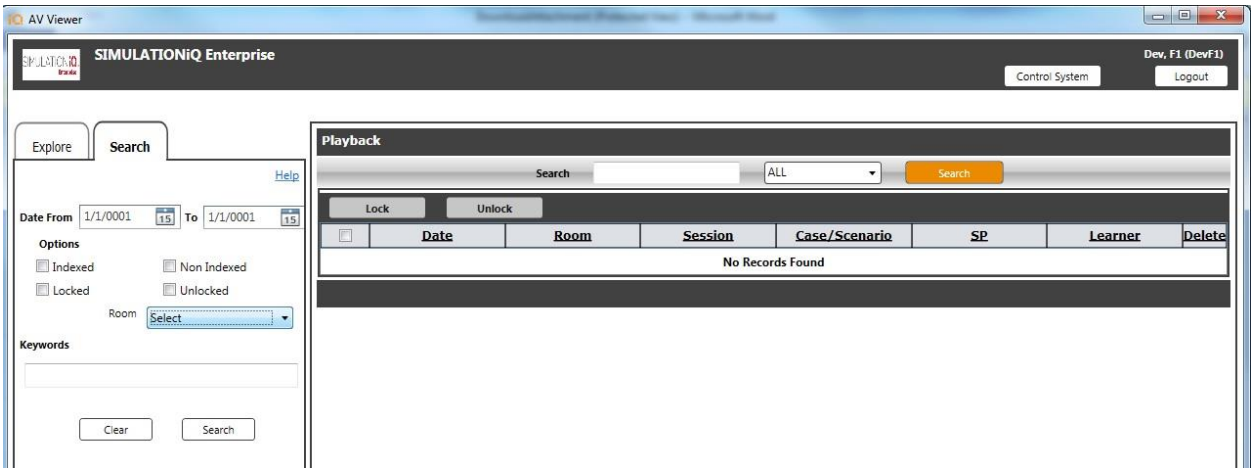
AV Viewer Security Access (where available)



In AV Viewer, only the rooms you have access to appear.

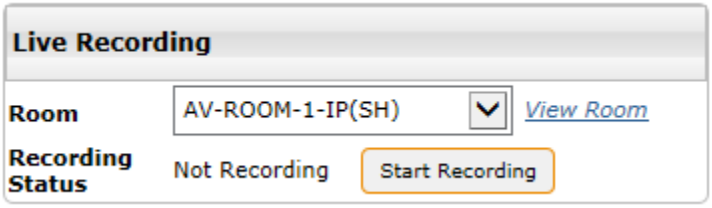


If you do not have access to record, then the **Record** button will not appear.



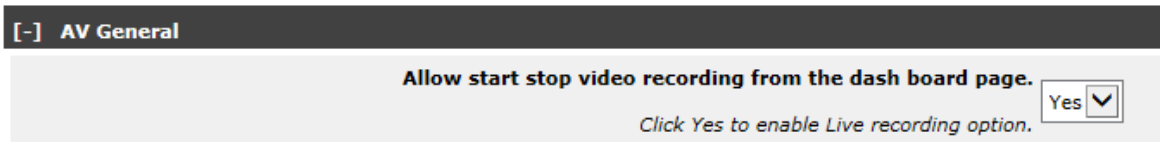
The search results only display the rooms you have access to.

Live Recording from the Dashboard Access Permissions



The Live Recording section on the Dashboard enables you to start/stop the recording from a dedicated room PC or from a user PC.

IMPORTANT! If security access restrictions are enabled, then changes made to **Settings > Rooms** affects the following functions in Live Recording from the Dashboard.



- Set the **Allow start/stop video recording from the Dashboard** parameter to **Yes** to indicate that live recording is available from the Dashboard.
- Only the rooms the user has access to in the room drop-down list.
- Click the **View Room** link to view live video, control the cameras, and bookmark the recording, depending on the security access restrictions enabled.
- The recording status and elapsed time for the selected room appears once the Start Recording button is clicked.

See Grant Edit or Read-Only Access to one or more Rooms from the Landing Page *for more information.*

Appendix B – Google Analytics

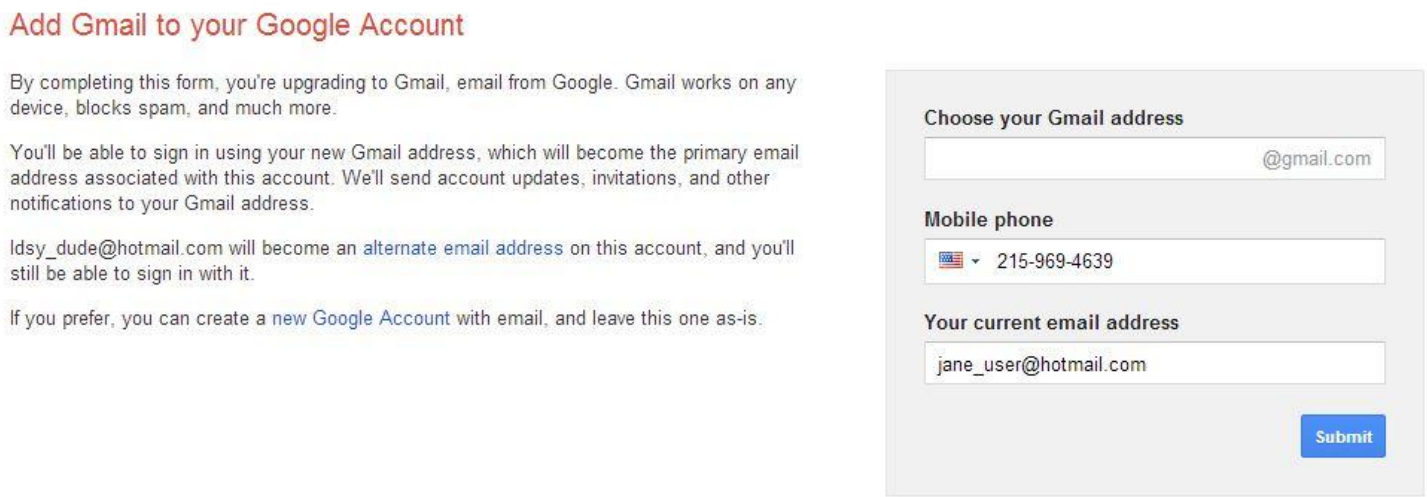
Introduction

Use Google Analytics to send usage data from your SIMULATIONiQ™ Enterprise web application to your Google Analytics account.

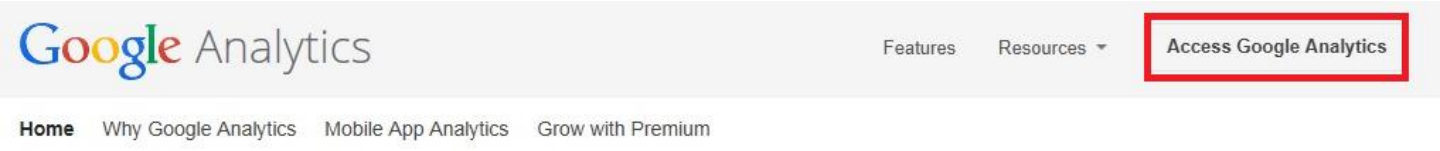
Getting Started

Step 1: Create a Gmail account if you don't already have one

Google > Gmail > Create an account.



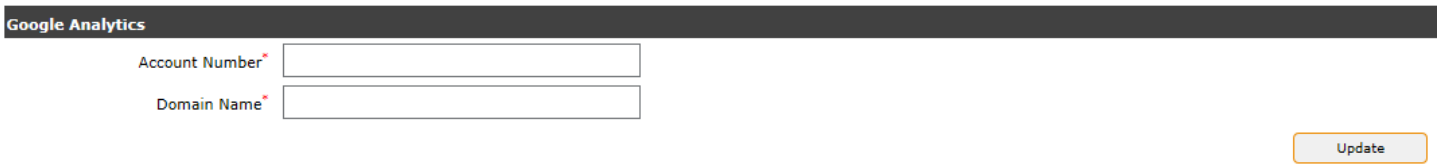
Step 2: Create a Google Analytics account



Visit www.google.com/analytics to create a Google Analytics account. Click **Access Google Analytics** and follow the instructions.

Step 3: Add your tracking code to the SIMULATIONiQ™ Enterprise web application

1. From the SIMULATIONiQ™ Enterprise web application, click **Settings > Portal Settings**.



In the **Google Analytics** section:

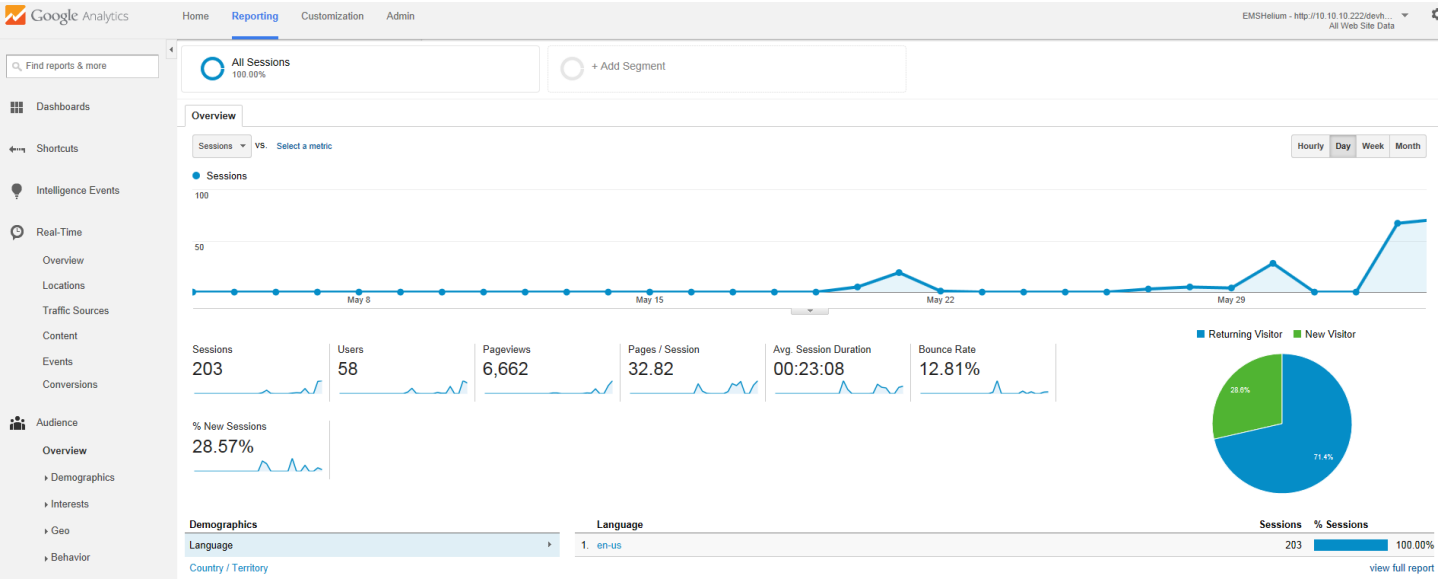
2. In the **Account Number** field, add your Google Analytics account ID. ***Note***: To find your account ID in Google Analytics, click **Admin > Account Settings**.

3. In the **Domain Name** field, add the URL of your SIMULATIONiQ™ Enterprise web application

4. Click **Update**. SIMULATIONiQ™ Enterprise web application usage data will be sent to your Google Analytics account.

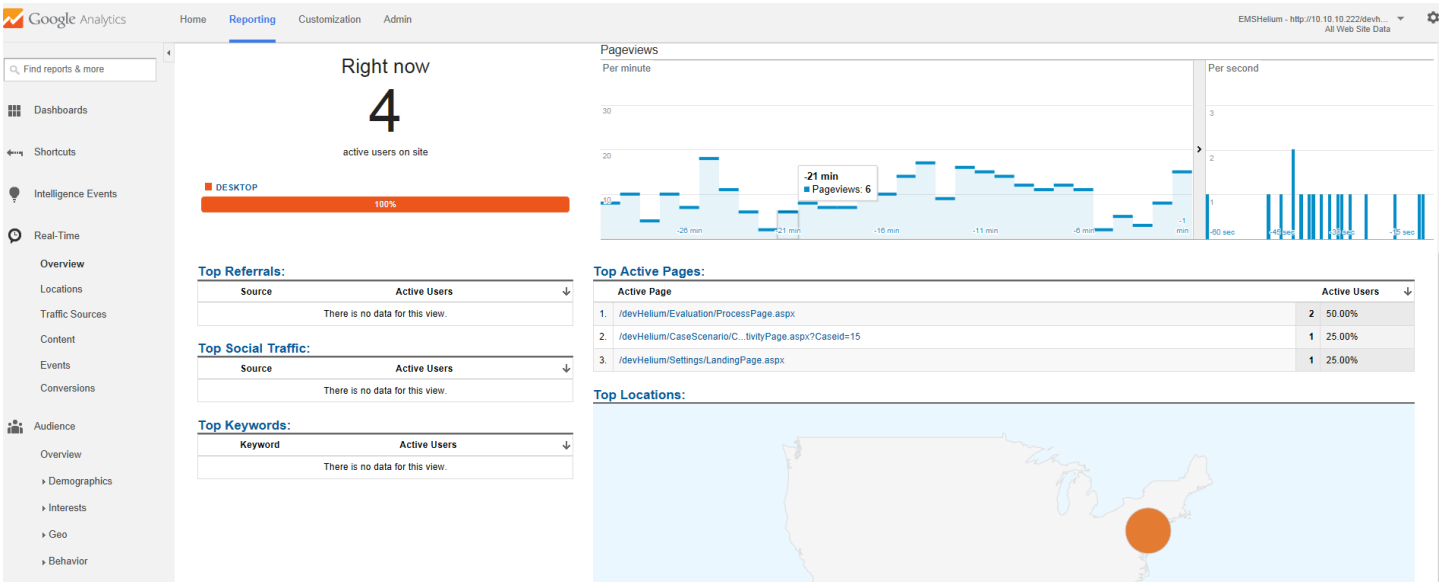
For more information about setting up your Google Analytics account, visit: https://support.google.com/analytics/answer/1008015?hl=en.

Google Analytics Reporting examples



Reporting > Audience > Overview

Use this section to understand you audience characteristics.



Reporting > Real-Time > Overview

Use this section to monitor SIMULATIONiQ™ Enterprise user activity as it happens.