# Getting Started with SIMULATIONiQ Enterprise

The Enterprise Administrator completes the following system set-up tasks to enable users to get started using SIMULATIONiQ Enterprise:

| | |
|---|---|
| **User Management** | User Lists, Pending Users, User Timesheets. |
| **System Administration** | Organization Structure, Bulk Upload, Inventory, Task Access. |
| **System Configuration** | Email Settings, Parameters, Portal Settings. |
| **AV Configuration** | Zones, Rooms, Software Configurations, Offline Processes, Computers and Servers, Locations. |
| **Dashboard** | Create notices, ticker messages, events. |

## 1. Identify Educators, Learners, SIM Techs, and SPs

**Educators have access to the following system features by default:**

- Educator Dashboard: message center, to-do list, favorites, calendar, my items
- Items Library (checklist creation)
- Cases & Scenarios
- Session Calendar
- Live or Recorded Video access
- Performance Evaluations
- Scores and Reports
- View upcoming sessions and events
- Survey
- Update their user profile

**Learners have access to the following by default:**

- Learner Dashboard: message center, to-do list, calendar
- Pre-sim study
- Pre-encounter checklist/quiz
- Post encounter checklist/quiz
- Electronic Health Record (add on module)
- Video (if granted access)
- Survey
- Register for open sessions
- View upcoming sessions and events
- Update their user profile

**Standardized Patients (SPs) have access the following by default:**

- SP Dashboard: message center, to-do list, calendar, favorites
- Case Trainer (case training tool)
- Video (if granted access)
- Evaluations
- Survey
- Update their user profile
- Provide availability
- Complete learner assessments

**Sim Techs** have access to the following by default:

- Sim Tech Dashboard: message center, favorites, information, to do list, calendar

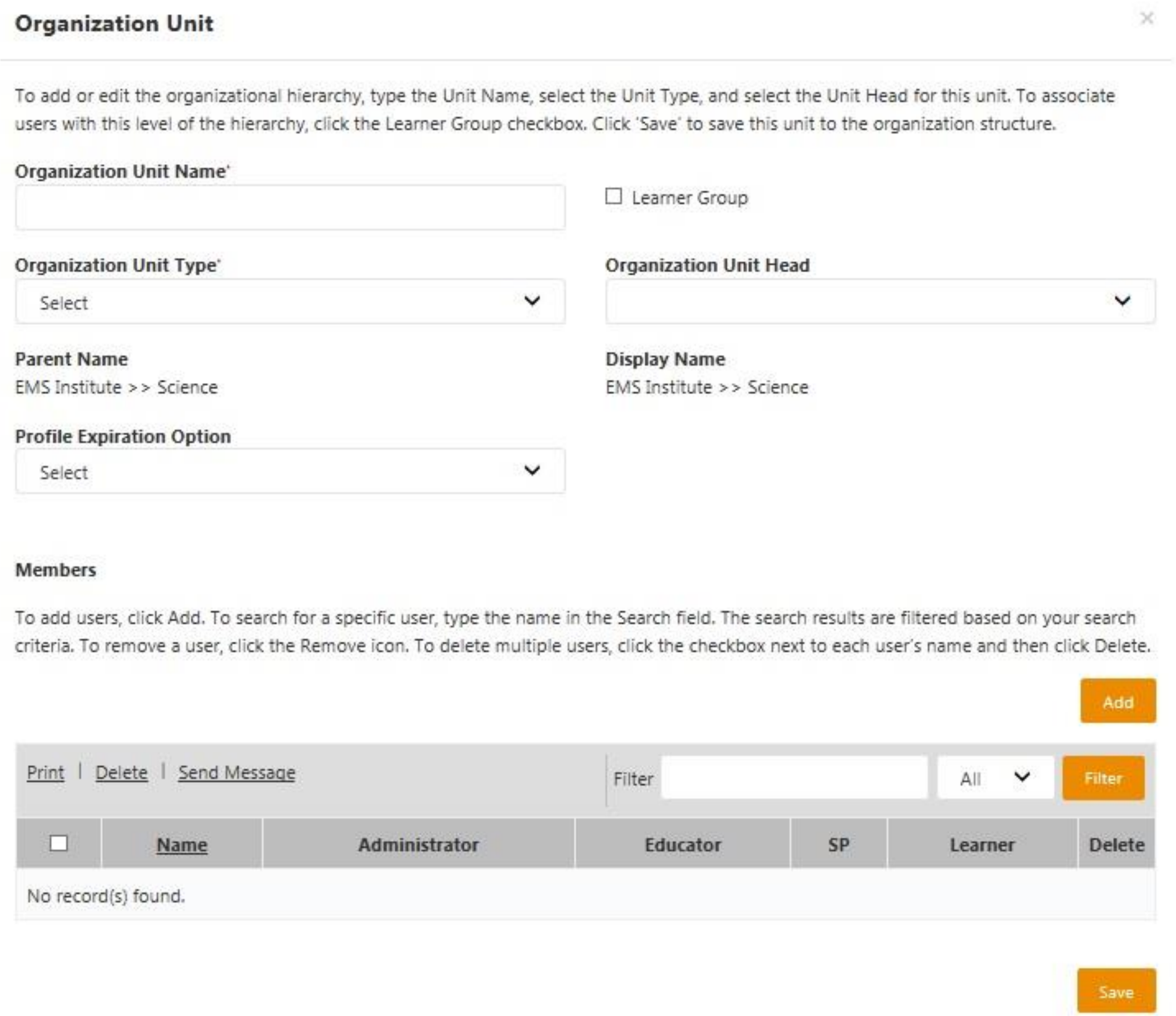
## 2. Define Your Organization Structure

*Settings > System Administration > Organization Structure > Add New*

Your SIMULATIONiQ Enterprise application is delivered with one parent Organization Unit, which defines your organization and gives you the ability to structure it with any number of units within an organizational hierarchy.

Once the Organizational Structure is defined, you can associate learner groups and user accounts with one or more levels in the structure.

- Run reports by unit name to see room and equipment usage.
- Designate Learner Groups within each Organization Unit, and then add learners as members.
- Apply permissions to an entire Organization unit to view and/or download videos.




1. Click **Settings > System Administration > Organization Structure.**

The list of Organization Units appears on the right. Your parent organization appears at the top of the list and, if other units have not been 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.

3. Click **Add New**. The Organization Unit screen appears.

4. Complete the *required fields.

***Note***: When adding members to an Organizational Unit, choose "Department" as the Organization Unit Type and click the Learner Group checkbox so members are automatically put into a Learner Group.

### *Create Learner Groups*

*Settings > System Administration > Organization Structure > Add New*

Use Learner Groups to classify learners for each level of the Organization Structure.

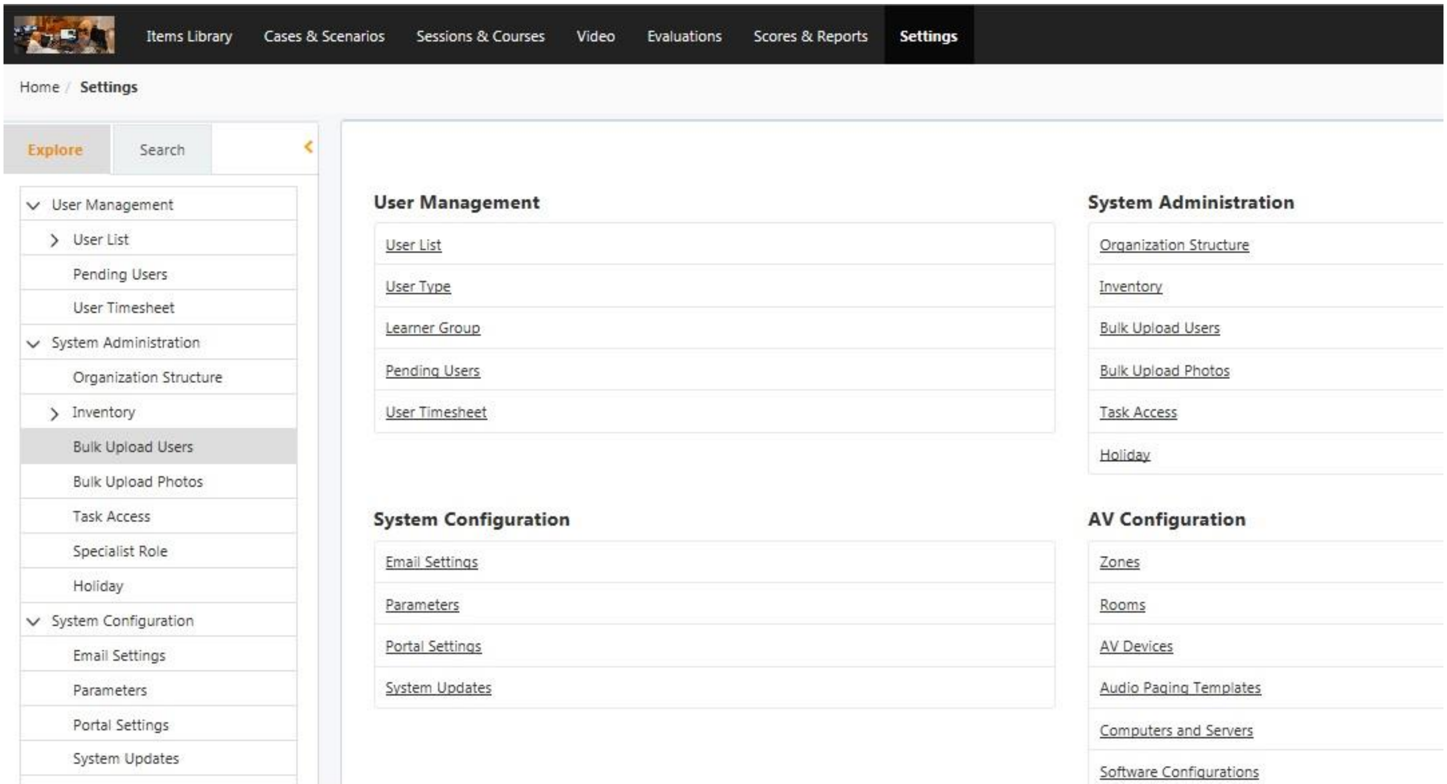
- Organize learners based on a skill level, i.e., Nursing, 2nd Year
- Filter your search for learners by a selected Learner Group.
- Allow learners to self-register for sessions.
- View and/or download videos can be applied to an entire Learner Group.

1. Click the **Learner Group** checkbox.
2. Click **Add** to search for and select users and then click **Add**.
3. Click **Save** to save the members of this organization unit.

## 3. Bulk Upload Users

*Settings > Bulk Upload Users*

The Administrator creates separate Excel spreadsheets for each user type (Educators, SPs, and Learners) and then uploads each file to SIMULATIONiQ™ Enterprise.


Items Library
Cases & Scenarios
Sessions & Courses
Video
Evaluations
Scores & Reports
Settings
Home / Settings
Explore
Search
User Management
User List
Pending Users
User Timesheet
System Administration
Organization Structure
Inventory
Bulk Upload Users
Bulk Upload Photos
Task Access
Specialist Role
Holiday
System Configuration
Email Settings
Parameters
Portal Settings
System Updates
User Management
User List
User Type
Learner Group
Pending Users
User Timesheet
System Administration
Organization Structure
Inventory
Bulk Upload Users
Bulk Upload Photos
Task Access
Holiday
System Configuration
Email Settings
Parameters
Portal Settings
System Updates
AV Configuration
Zones
Rooms
AV Devices
Audio Paging Templates
Computers and Servers
Software Configurations

## 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 |
| ☐ | Inventory Clerk | Learner |
| ☐ | Live View Only | SP |
| ☐ | SIM Tech | SIM Tech |
| ☐ | SP | SP |
| ☐ | SP Video Access | SP |
| ☐ | SP View Only | Educator |
| ☐ | Student | Learner |

**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

## 4. Define Parameters

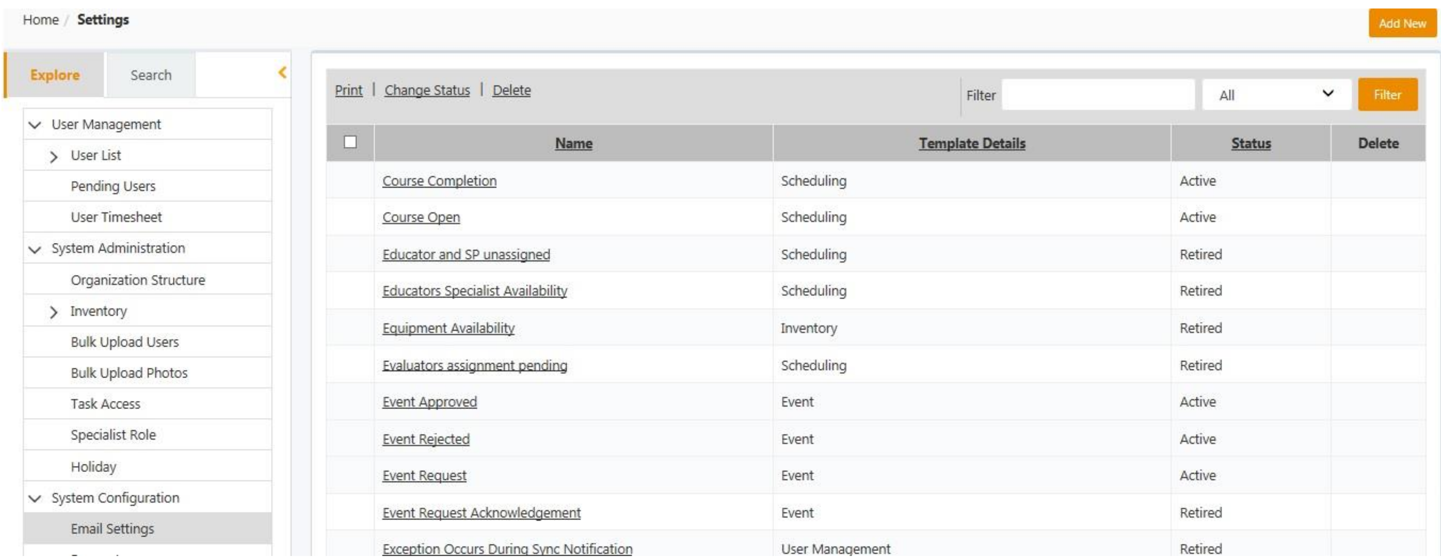
*Settings > Parameters*

Most parameters are set by EMS when configuring your application, but the Administrator can customize parameters to control the function of frequently used tools.

## 5. Customize Email Templates

*Settings > System Configuration > Email Settings*

Email Settings allow Administrators to use system-defined or create customized email templates for User Management, Scheduling, Inventory and Event Management.



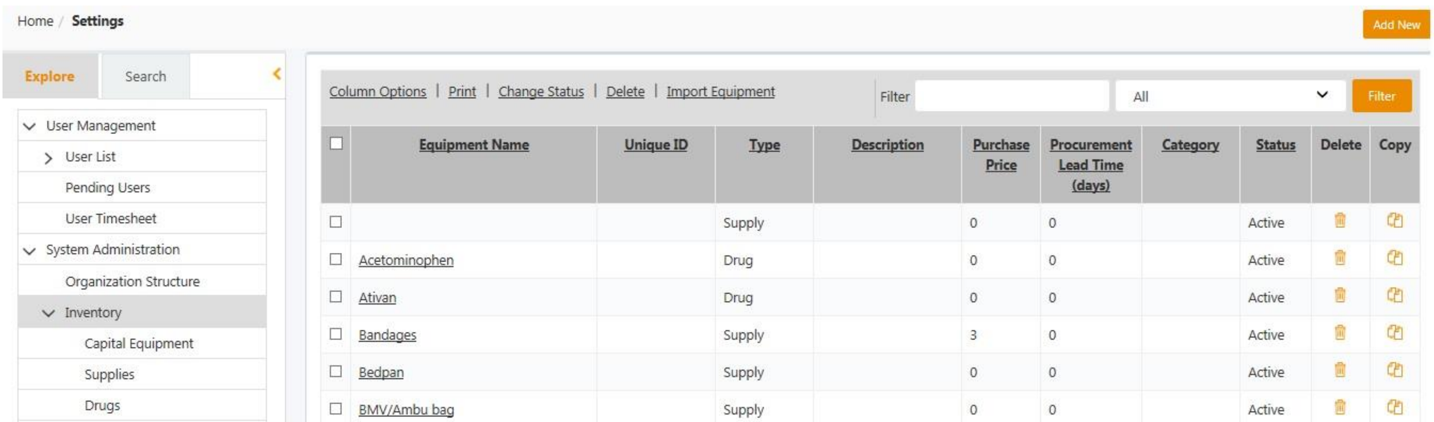

**IMPORTANT! Email Settings by default show a status of Retired. Email templates must be active to be used.**

## 6. Manage Inventory

*Settings > Inventory*

Use Inventory to manage capital equipment, supplies and drugs in your simulation center.

- Store information including available quantity, procurement and a minimum quantity to e-mail the system administrator when the supply falls below the threshold.
- Add support files for each item, such as photos, assembly instructions, or any other supporting documentation.
- Add warranty information and service records for capital equipment.
- Mark supplies and drugs as disposable or non-disposable. Disposable inventory will be subtracted from the inventory when used in a session.



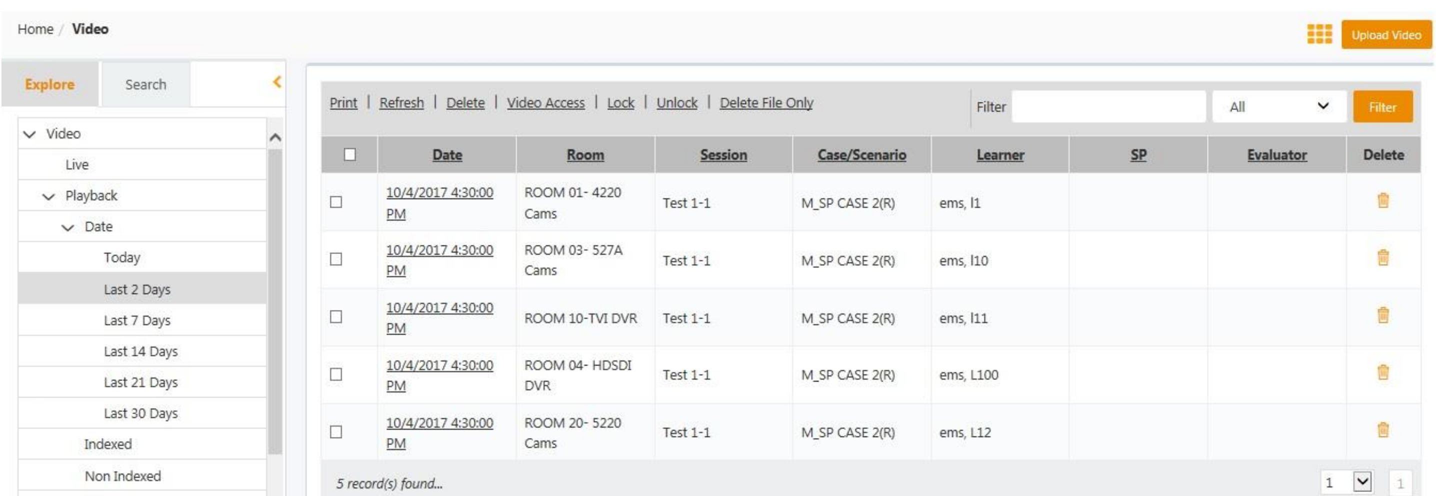

### *Import Equipment*

- Equipment can be imported using an Excel spreadsheet.
- Inventory quantities can be updated in bulk.

## 7. Create Bookmarks

*Video > Bookmarks*

Upload bookmark icons to note specific points within recorded video for easy location and viewing at a later time.




Bookmarks are created by naming the action it represents and obtaining an image file to be the bookmark's icon. Save the image to your computer and then upload the image. It will be easy to identify the bookmark task by its icon.

### *Using bookmarks*

When video is rolling, either while recording live or during playback, a bookmark can be applied. The bookmark is an annotation of a particular point in the video and time stamps it.

## 8. Build your Items Library

*Items Library*

The Items Library is the repository for the following building blocks for cases and scenarios:

- **Create categories** to organize your evaluation checklist questions and define the response types and scoring options to be used for each question.

- **Create questions** for the following checklist types:
  - Learner Pre Encounter
  - Learner Post Encounter
  - Performance Assessment
  - Learner Self-Assessment
  - SP Performance Assessment
  - Survey

- **Add multimedia files** (image, document, audio or video files) to associate with questions, cases, scenarios that would assist in the simulation.

## 9. Create Cases & Scenarios

*Cases & Scenarios > Cases & Scenarios*

A **case** defines an encounter between a learner and a standardized patient.
A **scenario** define an encounter between a team of learners and a manikin.

### ***Create Checklists***

*Cases & Scenarios > Checklists*

A checklist is a pre-defined set of questions for assessments: learner pre-encounter, learner post-encounter, learner self-assessment, survey, performance assessment or SP performance assessment.

## 10. Schedule Sessions

*Sessions and Courses > Simulation Sessions*

Schedule sessions between a learner and an SP or a simulator using a case or scenario for training and evaluation.

## 11. Evaluate the Session

*Dashboard > To Do List*

An Evaluator, either an Educator or and SP, select the performance assessment from the Dashboard To Do List, reviews the video recording of the session, and then completes a checklist to evaluate the learner's performance.

## 12. Generate Scores & Reports

Administrators and Educators can generate scores and statistic for learners and SP performance, and center and inventory utilization reports to review how the simulation center is being used. Reports may be generated in .pdf or Excel formats and printed, saved, and scheduled to be delivered to recipients.