EMTrack™ Quick Reference Guide

Dashboard Management

Overview

EMTrack allows you to create and manage filters that identify specific patients or groups of patients. These filters can be used to find certain patients, and they can be added to your dashboard, as gadgets, to provide information about certain types of patients at a glance. Combining filter criteria appropriately is essential for building useful gadgets and dashboards.

Filters and Gadgets

Before you build a dashboard, you will want to create filters, which are reusable sets of search criteria for use in client gadgets.

Configuring a division-level incident gadget involves selecting the appropriate division. There are no configuration options for the region-level incident gadget.

Configuring a client gadget includes selecting the appropriate filter. The summary gadget also calls for specifying how information is grouped, sorted, and displayed.

Incident Mode

While configuring a client list or client summary gadget, you can enable or disable incident mode. When the user selects this feature and specifies the incident, each enabled gadget shows only the patients who are associated with that incident.

Sharing

Depending on your role, you may be able to share the dashboards you create with other users based on a role, division type, or specific division. The dashboard is available to these users. However, they cannot change or reconfigure its layout, gadgets, or filters used.

Options

You can add a personal dashboard by starting from scratch. If your role permits, you can also create a dashboard by copying and customizing an existing dashboard.

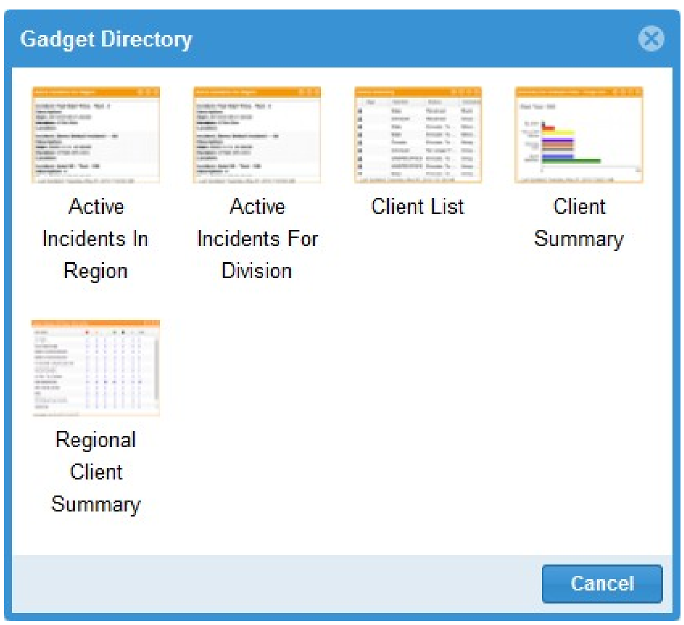
You can easily change the layout of your dashboard to one of the predefined settings using the **Change Dashboard Layout** option. You can also re-arrange the board by clicking and dragging gadgets.

It is important to note that you can build filters from within client gadgets. In addition, division administrators can design and build division-level dashboards. Refer to the EMTrack Help Center for details on these features.

To Build a Personal Dashboard

1. From any page, click the **Dashboard** tab.
2. Click **Configure** and select **Add Personal Dashboard**.

3. Add a gadget by doing one of the following:
   - In the gadget placeholder, click the **add a new gadget** link.
   - Click **Configure**, and then **Add Gadget**.
4. In the *Gadget Directory*, click the type of gadget you want to add. It appears in the dashboard.

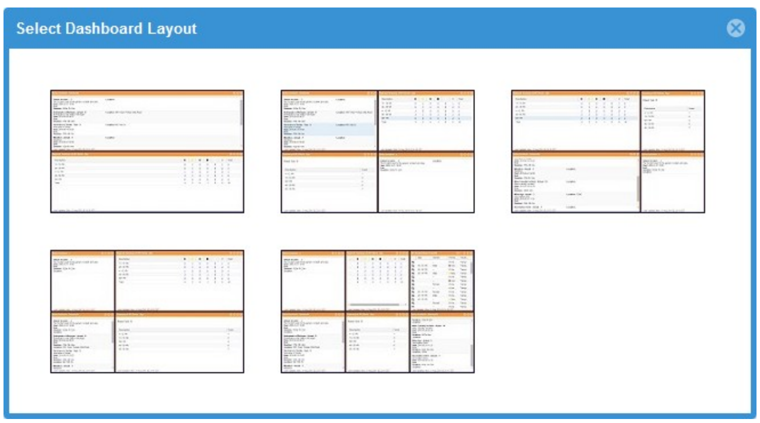


5. As appropriate, take these actions.

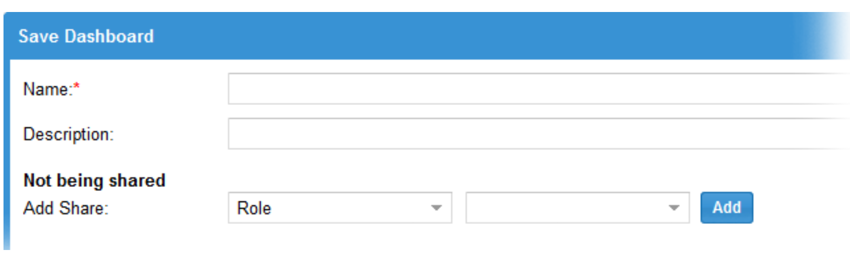
If you want to configure the gadget…	Then…
Active Incidents In Region	Not applicable – there are no configuration options for this gadget.
Active Incident For Division	From **Division**, select the division and click **Apply**.
Client List	a. For **Filter**, select the filter b. Clear or select the **Enable Incident Mode** check box. c. Click **Apply**.

If you want to configure the gadget…	Then…
Client Summary	a. For **Filter**, select the filter you want. b. For **Group By**, select the data type you want to group by. c. For **Sort By**, select the appropriate sort option. d. For **Summary Type**, select the appropriate type. e. Clear or select the **Enable Incident Mode** check box. f. Click **Apply**.
Regional Client Summary	a. For **Filter**, select the filter you want. b. For **Group By**, select the data type you want to group by. c. Clear or select the **Enable Incident Mode** check box. d. Click **Apply**.

6. To change the dashboard layout:
    a. Click **Configure**, and then **Change Dashboard Layout**.
    b. In the *Select Dashboard Layout* window, click the layout you want.



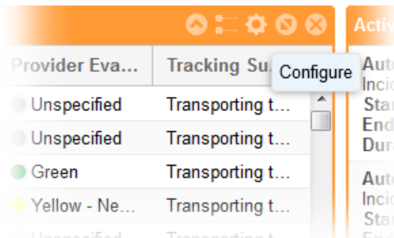
7. When you are done, click **Save**.
8. In the *Save Dashboard* window:



    c. For **Name**, enter a name for the dashboard.
    d. For **Description**, enter a description, if appropriate.
    e. If appropriate, for **Add Share**, share this dashboard by **Role**, **Division Type**, or a specific **Division**, and click **Add**.
    f. Repeat step c to add more sharing options.
    g. Click **Save**.

To Copy a Dashboard

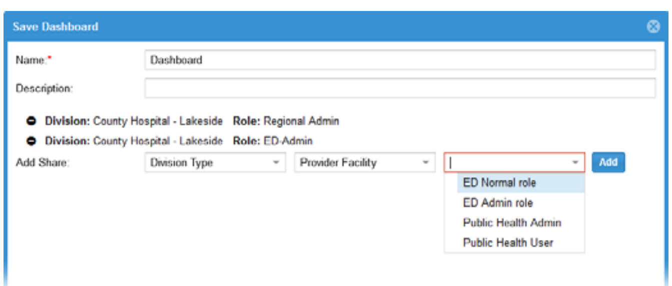
1. From any page, click the **Dashboard** tab.
2. For **Current Dashboard**, select the dashboard you want to copy.
3. Click **Configure** and select **Copy Dashboard**.



4. Remove a gadget by clicking its close icon.
5. Reconfigure a gadget by clicking its **Configure** icon and changing its settings.
6. Add a gadget by clicking **Configure** and then **Add Gadget**.
7. Follow steps 4 – 8 in the procedure To Build a Personal Dashboard to complete the process.

To Share a Dashboard

1. From any page, click the **Dashboard** tab.
2. For **Current Dashboard**, select the dashboard you want to share.
3. Click **Save**.



4. In the *Save Dashboard* window, take these actions.

If you want to share by…	Then…
Role	a. For **Add Share**, select **Role** from the first drop-down list. b. Select the specific role from the second list. c. Click **Add**. d. Repeat steps a – c to share by other roles.

If you want to share by…	Then…
Division Type	a. For **Add Share**, select **Division Type** from the first drop-down list. b. Select the **Regional** option or the type of provider from the second list. c. Select the specific role from the third list. d. Click **Add**. e. Repeat steps a – d to share by other division types.
Division	a. For **Add Share**, select **Division** from the first drop-down list. b. Select the specific provider from the second list. c. Select the specific role from the third list. d. Click **Add**. e. Repeat steps a – d to share with other specific divisions.

5. Click **Save**.

Juvare envisions a future where communities are resilient in the face of danger. Offering precise, vigilant, and connected solutions, Juvare fosters networks of mutual assistance to help organizations bounce forward. For more information about Juvare solutions, contact the Juvare Support Center, support@juvare.com or 877-771-0911.