SimplyCast

COMMAND HUB & EVENT USER GUIDE

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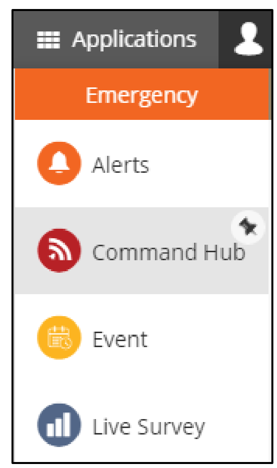
Overview

Command Hub is the main dashboard of the SimplyCast platform where you can manage the real-time progress of an ongoing crisis or emergency situation as well as view all your sending reports in one place as they are being updated in real time. Officials can customize this common operating picture dashboard according to what they deem useful at each level of deployment and it allows them to model the real world by letting them share the information that is most relevant to their expertise.

Pre-made event templates for any communication process can be created in the Event module and listed on the Command Hub Dashboard so they can be easily and quickly launched in the event of an emergency. Launching one of these pre-made event templates will send the user through an accelerated setup process that allows the pre-defined elements to be customized.

Default Dashboard

The Default Dashboard is the first thing you will see when you first access the Command Hub channel through the Applications toolbar at the top of your screen. When you access Command Hub in the future, you will automatically be directed to the Command Hub Dashboard you have most recently used.



From the Default Dashboard you can:

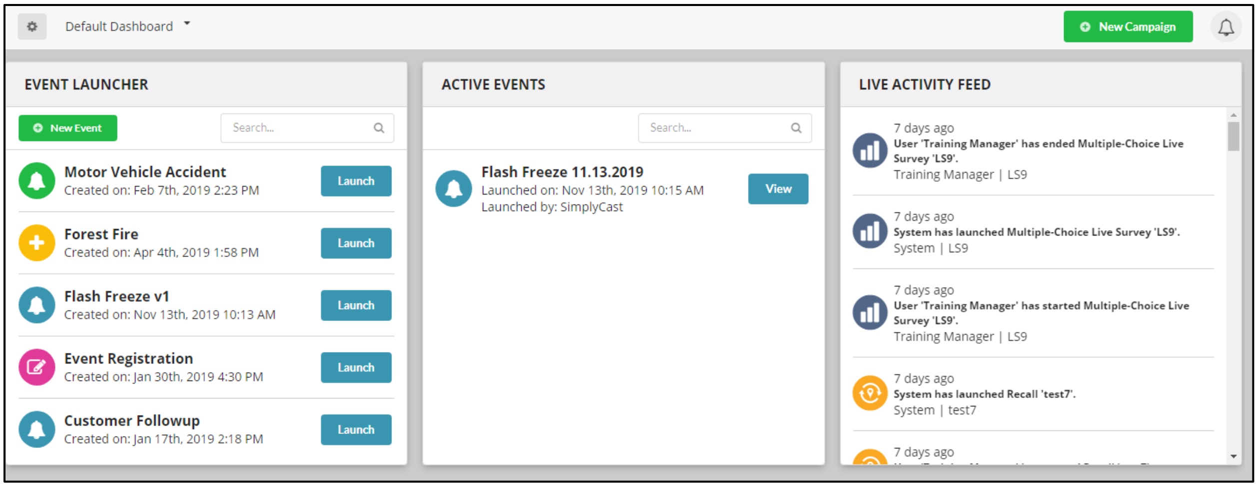
View the Default Widgets

[**Note:** A widget is a small form of an application or channel that has limited functionality.]

Upon entering the Default Dashboard in Command Hub, there are three widgets automatically situated on the dashboard.

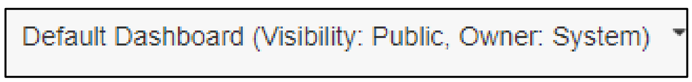
These are:

- Event Launcher
- Active Events
- Live Activity Feed



These widgets cannot be removed from the Default Dashboard. For more information on the functions of each of these widgets, refer to the *Add Widgets* section further on in this document.

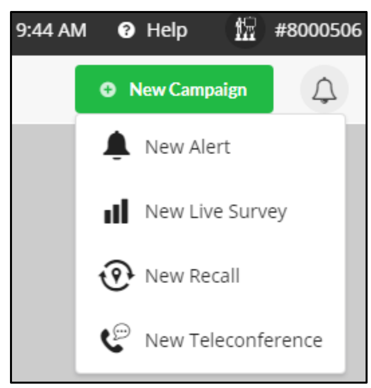
View Dashboard Information



At the top left of your dashboard, next to the Actions dropdown menu, you will see the dashboard dropdown which includes the following information about the current dashboard:

- **Dashboard Name:** The name given to the dashboard when it was created by a user or the system
- **Dashboard Visibility:** The level of visibility of the dashboard, either personal, public, or another users'
- **Dashboard Owner:** The user who owns, or has been assigned, the dashboard

Create a New Campaign



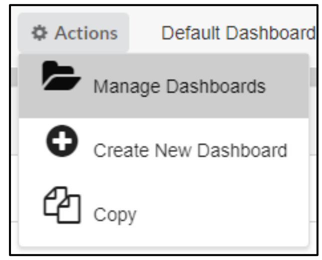
Instead of entering each channel individually to set up a communication campaign, you can do so right from the Default Dashboard. By navigating to the top right-hand side of your screen, you will find the green New Campaign button.

Clicking this button will open a dropdown menu with the following options:

- New Alert
- New Live Survey
- New Recall
- New Teleconference

Selecting any of these options will direct you to that particular module's setup page, allowing you to efficiently create a campaign to send out to your contacts. Refer to the corresponding user guides for each of these applications to learn how to set up a campaign.

Manage Dashboards

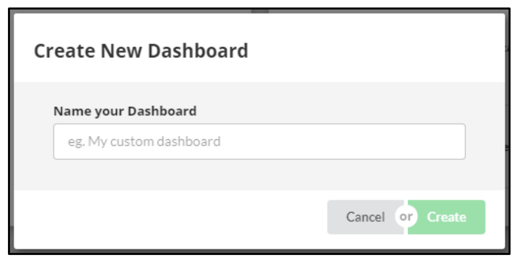


You have the ability to edit and manage multiple dashboards. To do this, you need to go to the Manage Dashboards page in Command Hub.

- Navigate to the top left of your screen to find the Actions menu.
- Click this button to bring up a dropdown menu with three items: Manage Dashboards, Create New Dashboard, and Copy.
- Select the Manage Dashboards option to be directed to a page where you can edit and manage your various custom dashboards.
- Refer to the *Manage Dashboards* section in the *Custom Dashboards* section below for more information about this view.

Create a New Dashboard

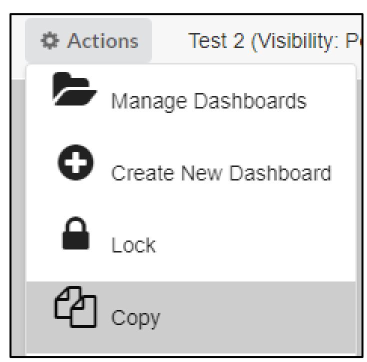
To create a new dashboard:



- Locate the green Create dashboard at the top left of the screen.
- Clicking this button will produce a pop-up where you can enter the name of your new dashboard.
- Click the green Create button when you have named the dashboard and you will be directed to your new blank dashboard. Alternatively, click Cancel to return to the default dashboard without creating a new one.

[**Note:** Refer to the Custom Dashboards section for more information on custom dashboards and their options.]

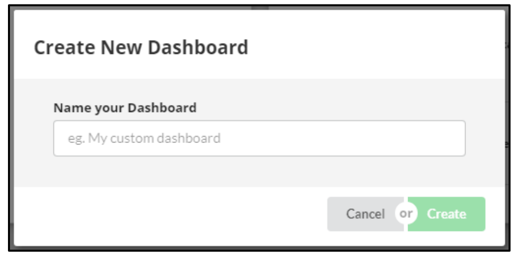
Copy the Default Dashboard



If you would like to duplicate the default dashboard:

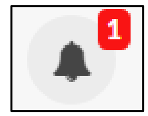
- Navigate to the top left-hand corner of your screen where you will the Actions button.
- Click this button to open a dropdown menu with the option to copy your dashboard.

- Select the Copy option and a pop-up window will appear asking you to name your new dashboard.
- Click the green Create button when you have named the dashboard and you will be directed to your new, duplicated dashboard. Alternatively, click Cancel to return to the default dashboard without making a copy.



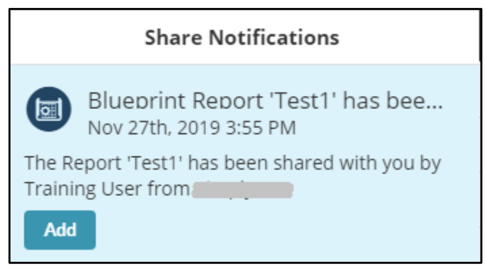
View Share Notifications

Whenever another user in your SimplyCast account shares a blueprint reporting widget with your account, account group, or network, you will receive a notification indicating that the report was shared with you.



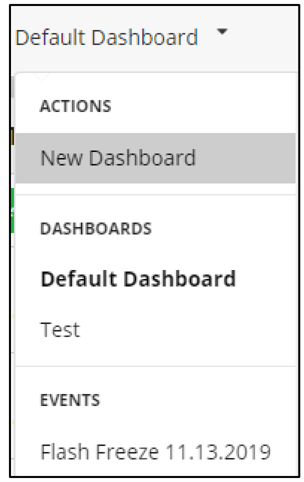
To view any shared notifications you have received:

- Navigate to the top right-hand corner of the Command Hub Dashboard where you will find a gray bell button underneath the top black bar, next to the blue Add Widgets button. If you have any new notifications you will see a red marker appear over the button.
- Click this button to open a sidebar menu from the right side of your screen.
- If you have any new share notifications, you will be able to see them in this sidebar. If the sidebar is empty, this means you have no new share notifications.
  > For each new notification you will see a description of newly granted access, as well as a blue Add button that you can click to add the widget to your Command Hub dashboard.



- Click the blue View all Share Notifications button appearing at the bottom of the sidebar to view all your recent share notifications and add any of the shared widgets to your dashboard. Alternatively, click Close to close the sidebar without viewing your share notifications.

Custom Dashboards



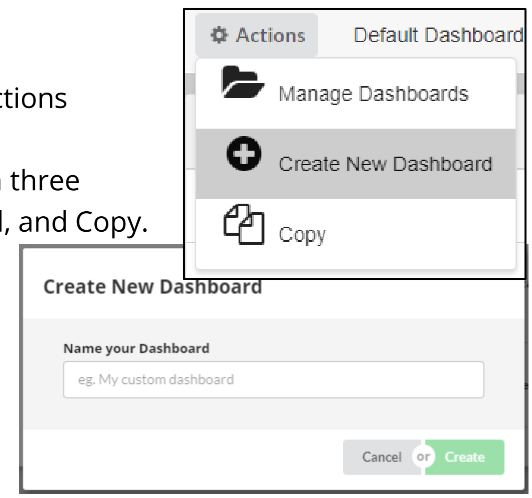
Rather than always copying your Default dashboard for each new event or incident and being stuck with only the three widget options, you are able to create your own custom dashboard where you can add additional widgets for each campaign.

Custom dashboards exist in three permission states:

- **Personal:** Private dashboards that are only accessible to the user who created them
- **Public:** Dashboards that have been published by a user to make them available to all members of an account
- **Other Users':** Dashboards that have been shared with a user but were not created by them

You are able to view which type of custom dashboard you are on at the top of the page, to the right of the Actions menu.

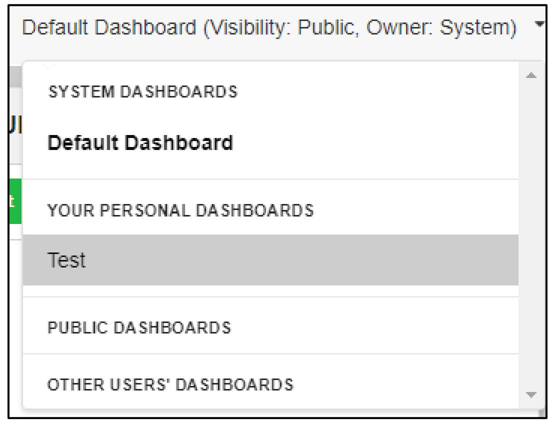
To create a new custom dashboard:



- Navigate to the top left of your screen to find the Actions menu.
- Click this button to bring up a dropdown menu with three items: Manage Dashboards, Create New Dashboard, and Copy.
- Select the option to create a new dashboard, which will bring up a pop-up window where you can type in the name of your new dashboard.
- Click the green Create button to create the new dashboard or click Cancel to return to the default dashboard without creating a new one.

Once you have created a new custom dashboard you can:

Switch Between Multiple Dashboards



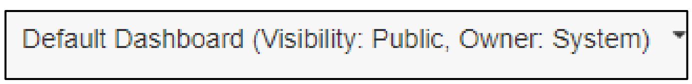
Typically, you will want to create a new dashboard for each separate ongoing event (especially if you are not launching a pre-made Event template). Alternatively, you can base dashboards on different types of "views" you wish to monitor.

To switch between multiple dashboards:

- Navigate to the top left of your screen to find the Default Dashboard heading with a downward arrow to its right.
- Click this arrow to bring up a dropdown list with four dashboard sections: System Dashboards (your default dashboard), Personal Dashboards (your unpublished private dashboards), Public Dashboards (your published personal dashboards), and Other Users' Dashboards (dashboards that have been shared with you).
- Select the name of the dashboard in any of these sections you wish to view.

[**Note:** If you have not yet created a new custom dashboard, the only option appearing in your list will be Default Dashboard.]

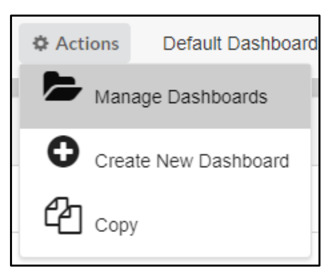
View Dashboard Information



At the top left of your dashboard, next to the Actions dropdown menu, you will see the dashboard dropdown which includes the following information about the current dashboard:

- **Dashboard Name:** The name given to the dashboard when it was created by a user or the system
- **Dashboard Visibility:** The level of visibility of the dashboard, either personal, public, or another users'
- **Dashboard Owner:** The user who owns, or has been assigned, the dashboard

Manage Dashboards



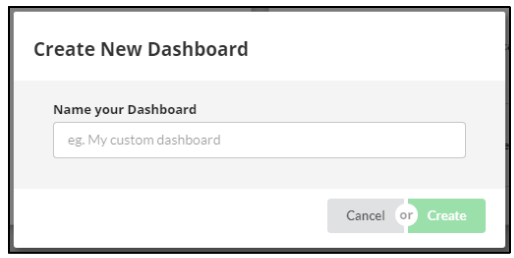
You have the ability to edit and manage multiple custom dashboards. To do this, you need to go to the Manage Dashboards page in Command Hub.

- Navigate to the top left of your screen to find the Actions menu.
- Click this button to bring up a dropdown menu with three items: Manage Dashboards, Create New Dashboard, and Copy.
- Select the Manage Dashboards option to be directed to a page where you can edit and manage your various custom dashboards.

From here: you can:

Create Custom Dashboard

To create a new dashboard:



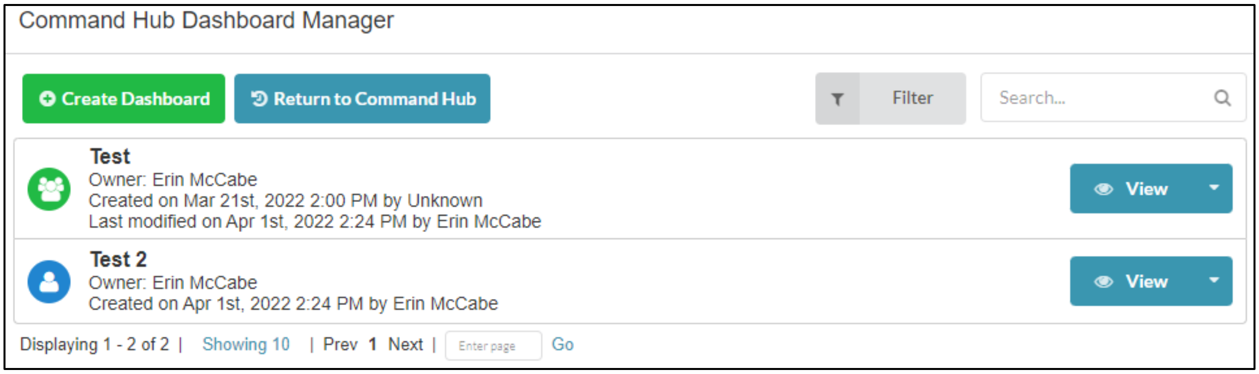
- Locate the green Create dashboard at the top left of the screen.
- Clicking this button will produce a pop-up where you can enter the name of your new dashboard.
- Click the green Create button when you have named the dashboard and you will be directed to your new blank dashboard. Alternatively, click Cancel to return to the default dashboard without creating a new one.

View the List of Custom Dashboards

Below the Create Dashboard button is the list of all the custom dashboards that have been created. If there are no dashboards listed, this means none have been created. Next to each dashboard will be an icon displaying that custom dashboard's visibility as either a personal (a blue circle with a person) or public (a green circle with multiple people).

You will also be able to see the following information for each dashboard:

- **Owner:** The owner of the dashboard/who the dashboard is assigned to
- **Created:** The date and time the custom dashboard was created and by who
- **Last Modified:** The date and time the custom dashboard was last modified and by who



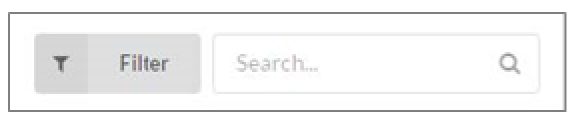
Navigate Multiple Pages of Dashboards

To view a custom dashboard that does not appear on the first page of the list:

- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of pages of dashboards.
- Click either a page number to proceed to another page of dashboards or the Next button, which will take you to the next page of dashboards.
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- Choose how many alerts to display at a time by clicking on the “Showing…” link located to the right of the number of displayed dashboards.

Search for Custom Dashboard

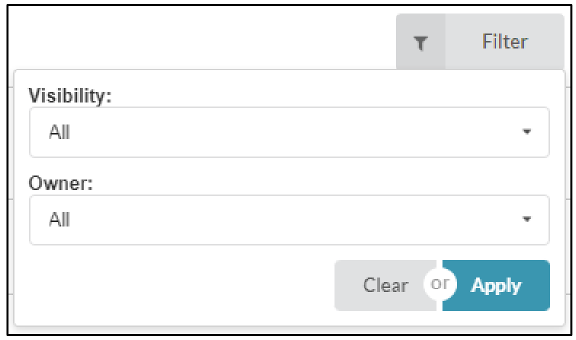
To search for a particular custom dashboard:



- Locate the search bar that appears in the top right-hand corner of the page.
- Type in the text that you would like the system to search by.
- The dashboards will begin to filter automatically.

Filter Custom Dashboards

To filter the list of custom dashboards:



- Find the gray Filter button at the top right-hand side of the Dashboard Manager beside the search bar.
- Click the Filter button and a menu will appear with two dropdown menus to allow you to filter dashboards by visibility and owner.
    - > Clicking the Visibility dropdown will provide you with the ability to filter by public, personal or all dashboards.
    - > Clicking the Owner dropdown will provide you with the ability to filter by a list of users on your account who have created custom dashboards.
- Click the blue Apply button to implement the filter. Or, click Clear if you do not wish to filter the dashboards, which will close the dropdown menu.
- The normally gray Filter button will appear green when a filter has been applied to the list of dashboards. To remove the filter, click the Filter button again and select Clear to remove all filters.

View Custom Dashboard

To view a custom dashboard that appears in the list, click the blue View button that appears across from the dashboard you would like to access. You will be directed to that dashboard and will be able to view the information displayed there.

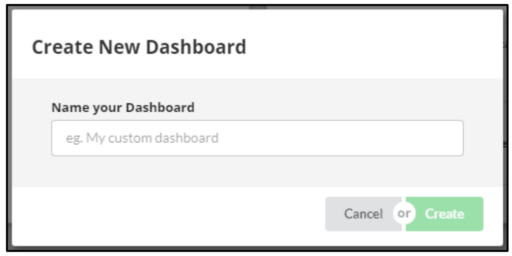
Refer to the *Monitoring Dashboard Widgets* section for more information.

Copy Custom Dashboard

If you would like to duplicate a custom dashboard:

- Navigate to the right-hand side of your screen across from the dashboard you wish to copy.
- You will see a blue View button. Click the arrow on the right side of this button to open a dropdown menu with the option to copy your dashboard.
- Select the Copy option and a pop-up window will appear asking you to name your new dashboard.

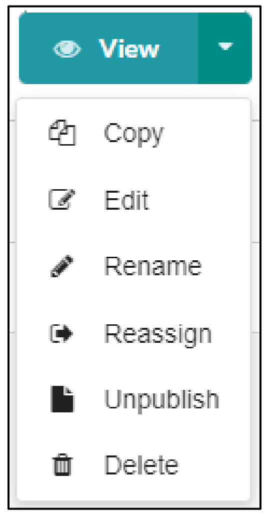
- Click the green Create button when you have named the dashboard and you will be directed to your new, duplicated dashboard. Alternatively, click Cancel to return to the default dashboard without making a copy.



Edit Custom Dashboard

If you would like to edit a custom dashboard:

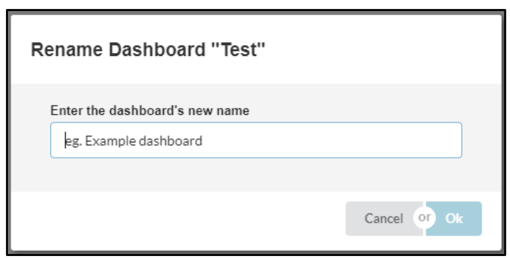
- Navigate to the right-hand side of your screen across from the dashboard you wish to edit.
- You will see a blue View button. Click the arrow on the right side of this button to open a dropdown menu with the option to edit your dashboard.
- Select the Edit option and you will be directed to the custom dashboard where you can add and remove widgets, customize the layout, etc. Refer to the *Add Widgets* section for more information about how to edit a custom dashboard.



Rename Custom Dashboard

If you would like to rename a custom dashboard:

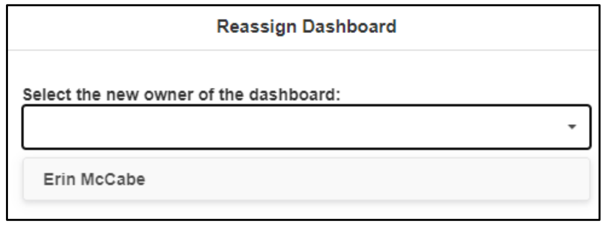
- Navigate to the right-hand side of your screen across from the dashboard you wish to rename.
- You will see a blue View button. Click the arrow on the right side of this button to open a dropdown menu with the option to change the name of your dashboard.
- Select the Rename option and a pop-up window will appear asking you to rename your dashboard.
- Click the blue OK button when you have renamed the dashboard to close the pop-up and change the name. Alternatively, click Cancel to close the pop-up without renaming the dashboard.



Re-assign Custom Dashboard

To re-assign a custom dashboard to a different owner:

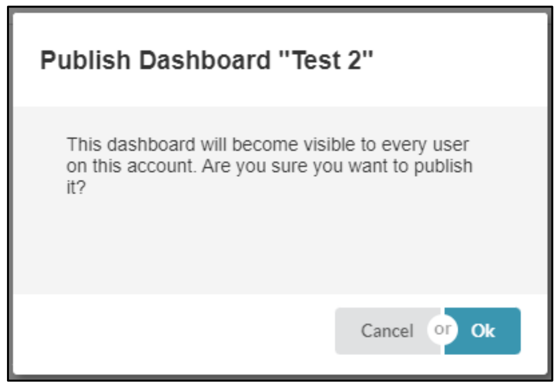
- Navigate to the right-hand side of your screen across from the dashboard you wish to re-assign.



- You will see a blue View button. Click the arrow on the right side of this button to open a dropdown menu with the option to re-assign your dashboard.
- Select the Re-assign option and a sidebar will appear from the right of your screen with a dropdown menu asking you to select a new owner for your dashboard.
- Choose from the available users in the dropdown list.
- Click the blue Save button when you have chosen a new owner for the dashboard. Alternatively, click Cancel to close the sidebar without choosing a new owner.

Publish/Unpublish Custom Dashboard

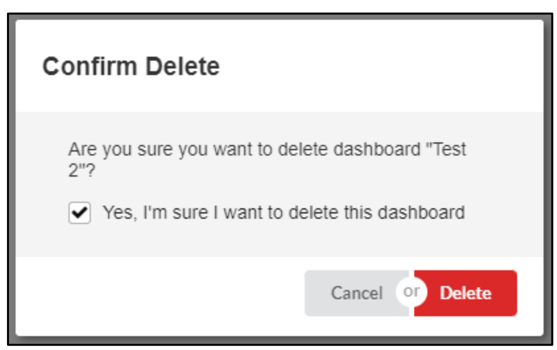
If you would like to publish/unpublish a custom dashboard:



- Navigate to the right-hand side of your screen across from the dashboard you wish to publish/unpublish.
- You will see a blue View button. Click the arrow on the right side of this button to open a dropdown menu with the option to change the status of your dashboard.
- Select the Publish/Unpublish option and a pop-up window will appear asking you to confirm you wish to publish or unpublish your dashboard.
- Click the blue OK button to confirm and close the pop-up. Alternatively, click Cancel to close the pop-up without changing the dashboard's published status.

Delete Custom Dashboard

If you would like to delete a custom dashboard:



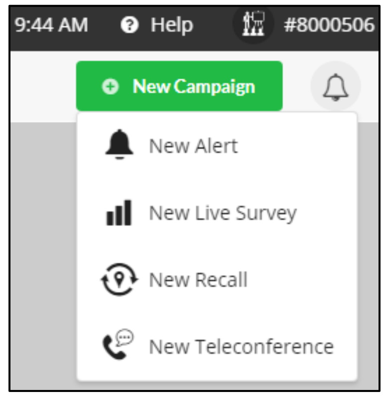
- Navigate to the right-hand side of your screen across from the dashboard you wish to delete.
- You will see a blue View button. Click the arrow on the right side of this button to open a dropdown menu with the option to delete your dashboard.
- Select the Delete option and a pop-up window will appear asking you to confirm you wish to delete or unpublish your dashboard.
- Check off the checkbox in the pop-up.

- Click the red Delete button to confirm and close the pop-up. Alternatively, click Cancel to close the pop-up without deleting the dashboard.

Return to Command Hub

To exit the Manage Dashboards view and return to the last Command Hub dashboard you accessed, click the blue Return to Command Hub button located to the right of the green create dashboard button.

Create a New Campaign



When on a custom dashboard, you are able to set up a communication campaign right from your custom dashboard, instead of entering each application individually to do so. By navigating to the top right-hand side of your screen, you will find the green New Campaign button.

Clicking this button will open a dropdown menu with the following options:

- New Alert
- New Live Survey
- New Recall
- New Teleconference

Selecting any of these options will direct you to that channel's setup page, allowing you to efficiently create a campaign to send out to your contacts. Please refer to the corresponding user guides for each of these channels to learn how to set up a campaign.

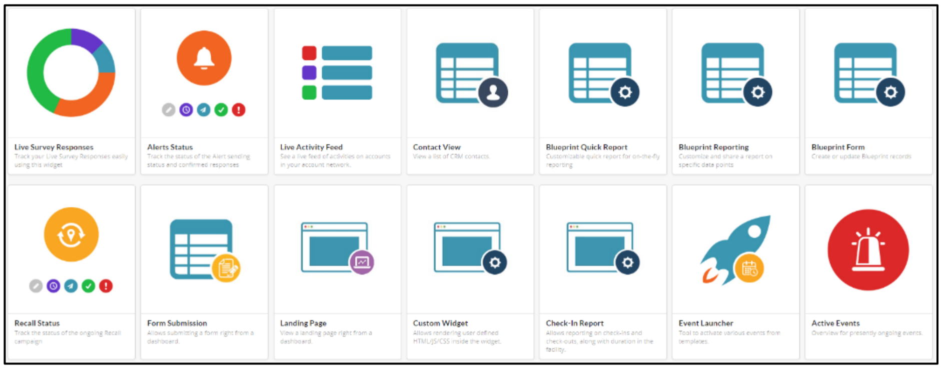
Add Widgets

When you create a new custom dashboard, it is a blank slate. You have the option to customize it however you like by adding widgets to create easy access to your active campaigns pertaining to the ongoing event or incident for which you created the dashboard.

A widget is a small form of an application that has limited functionality and can be added to the dashboard by a user. A widget of a SimplyCast channel allows the user to view the status of an active campaign and any responses it has received, updated in near real time.

To add widgets to your custom Command Hub dashboard, navigate to the top right-hand corner of your screen in a custom dashboard where you will see a blue Add Widgets button next to the green New Campaign button. Clicking the Add Widgets button will bring up a page with the available widgets you can choose to add to your dashboard.

These are:

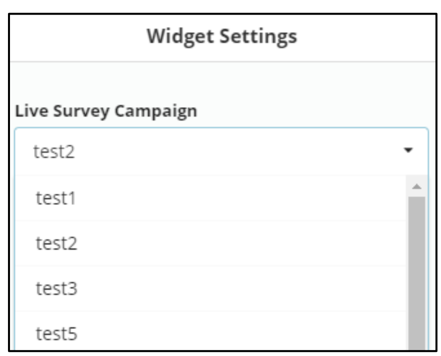


- Live Survey Responses
- Alerts Status
- Live Activity Feed
- Contact View
- Blueprint Quick Report
- Blueprint Reporting
- Blueprint Form
- Recall Status
- Form Submission
- Landing Page
- Custom Widget
- Check-in Report
- Event Launcher
- Active Events

Live Survey Responses

This widget allows you to view incoming responses to deployed live surveys without having to enter the specific survey's report. Responses to your selected survey will be updated in real time. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:



- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you select the Live Survey campaign from the dropdown menu that you would like to view on the dashboard.
- Below the Live Survey Campaign field you have the option to choose how you would like the data to be presented in the chart Style Field. Choose whether you wish to view the responses data in a pie chart or bar graph from the dropdown menu provided.

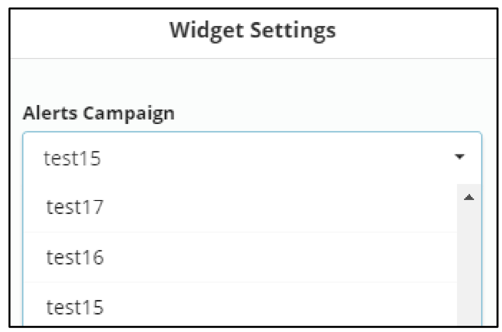
- When finished, click the blue Add to Dashboard button at the bottom of the sidebar to add the widget, or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Alerts Status

This widget allows you to track the status of the alerts that pertain to an ongoing event or incident. You are able to view both the alert's sending status as well as any confirmed responses as they come in. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:



- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you select the specific alert from the dropdown menu that you would like to view on the dashboard.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Live Activity Feed

This widget allows you to see a live feed of the actions taken by other account users in your network, so everyone can remain up-to-date and on the same page. Hover over this widget and an Add to Dashboard button will appear.

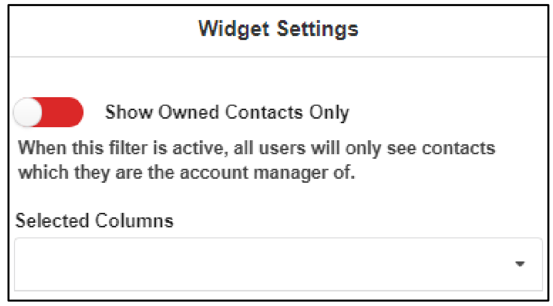
Clicking this button will immediately add the widget to your custom dashboard.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

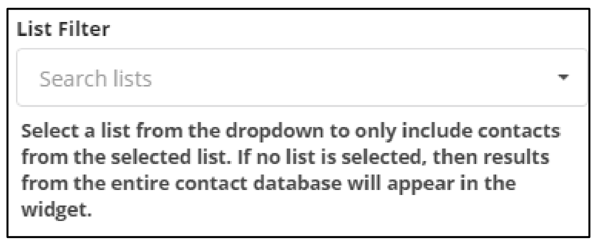
Contact View

This widget allows you to view a list of your CRM contacts on the Command Hub dashboard. You are able to view contacts' names, along with their basic contact information. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:



- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you select the information columns you would like to view on the dashboard for each contact from the Selected Columns dropdown menu.
- You can click on the toggle button to enable the Show Owned Contacts Only feature, which will only display the contacts an individual user is the account manager of when they view the Command Hub dashboard. To enable this option, make sure the toggle is pointed to the right and colored green.
- You can click on the List Filter dropdown to specify the list of contacts to be displayed, rather than the entire contact database. You can type in this dropdown to search for a specific list if it isn't displayed right away.



- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

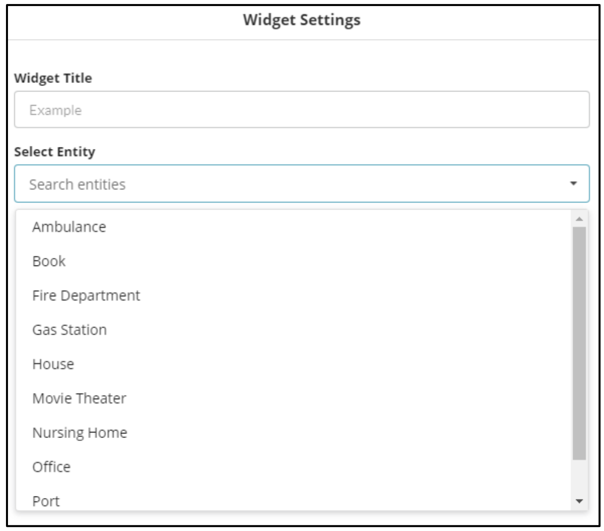
Blueprint Quick Report

This widget allows you to create a blueprint report on the fly showing one or more blueprints and their associated records in an easy-to-read report displayed on your custom dashboard. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:

- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can input a name for the new widget in the Widget Title field.

- Then, select your desired blueprint entity from the dropdown list provided in the Entity Type field.
- Three more fields will appear below the Select Entity field in the sidebar. In the first field, you must choose which blueprint forms to use for creating and updating records. Refer to the *SimplyCast Blueprints & Map User Guide* for more information about blueprint forms. If you have not created any custom forms for the chosen blueprint entity, the fields will be populated with the "Autogenerated Form" options.



- In the next field, you must check off which fields belonging to the chosen entity you would like to appear in the Quick Report. Click the checkboxes located on the left side of the field names you wish to include in the report.
- The last new field that appears in the Widget Settings sidebar is where you are able to create a filter to determine what information you would like to receive in this Quick Report. Refer to the *SimplyCast Blueprints & Map User Guide* for more information on creating a filter for your blueprint report.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

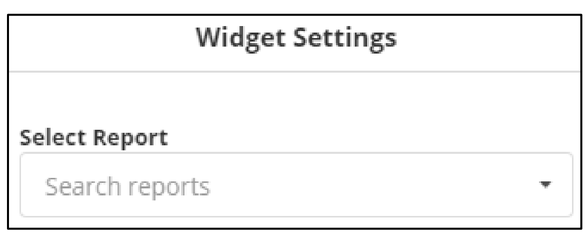
For more information about this widget, refer to the *Monitoring Dashboard Widgets* section.

Blueprint Reporting

This widget allows you to view and share specific information about one or more blueprints and any associated records in an easy-to-read report displayed on your custom dashboard. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:

- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can select a pre-made blueprint report to view on your custom dashboard from the Select Report dropdown menu.

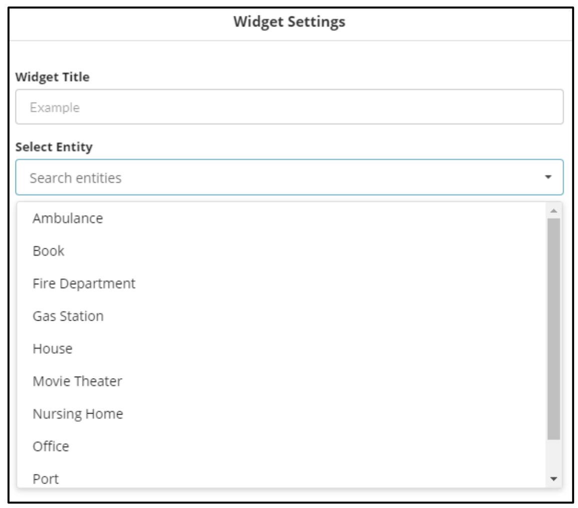


- You are also able to select the update form you want to use for the associated report. If none is selected, an autogenerated form will be used.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Blueprint Form

This widget allows you to add a method for creating new records for a chosen blueprint entity to your custom dashboard using either an autogenerated form (containing all entity fields) or a custom form created in the Blueprints application. Refer to the *SimplyCast Blueprints & Map User Guide* for more information about creating forms. Hover over this widget and an Add to Dashboard button will appear.



When you click Add to Dashboard for this option:

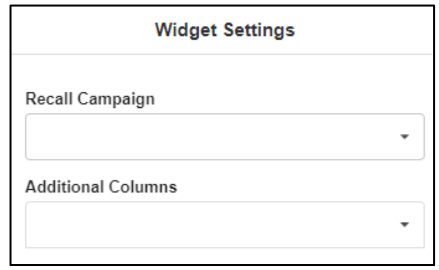
- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can input a name for the new widget in the Widget Title field.
- Select your desired blueprint entity from the dropdown list provided in the Entity Type field.
- A new field will appear where you can choose which form you would like to add to the dashboard for creating new records of this entity. If you have not created any custom forms for the chosen blueprint entity, the fields will be populated with the "Autogenerated Form" option. Refer to the *SimplyCast Blueprints & Map User Guide* to learn more about creating custom forms.
- If you click on the Share checkbox, new records submitted in the form will be shared automatically after submission.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Recall Status

This widget allows you to track the status of an ongoing recall pertaining to an incident or event without having to enter the specific recall's report. Responses to the recall will be updated in real time. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:



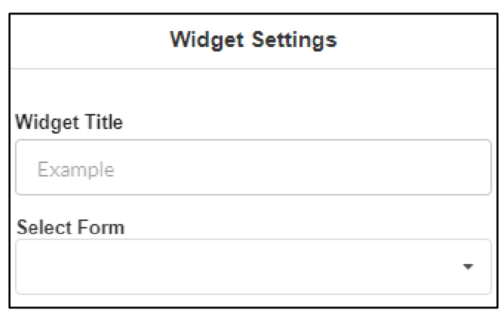
- A Widget Settings Dashboard will open on the right-hand side of the Add Widgets screen where you can select the recall campaign from the dropdown menu that you would like to view on your dashboard.
- In the Additional Columns dropdown, you can choose to add more information columns to the widget that will pull contact information from the CRM. Select up to five of these columns if desired and they will show up underneath the dropdown menu.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget to your custom dashboard or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Form Submission

This widget allows you to view and submit form created in the Form Builder from your custom dashboard. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:



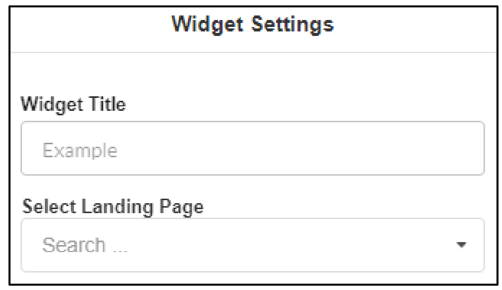
- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can name the widget in the Widget Title field.
- Then, select a pre-made form to view on your custom dashboard from the Select Form dropdown menu.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Landing Page

This widget allows you to view a landing page created in the Landing Page Generator from your custom dashboard. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:



- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can name the widget in the Widget Title field.
- Then, select a pre-made landing page to view on your custom dashboard from the Select Landing Page dropdown menu.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

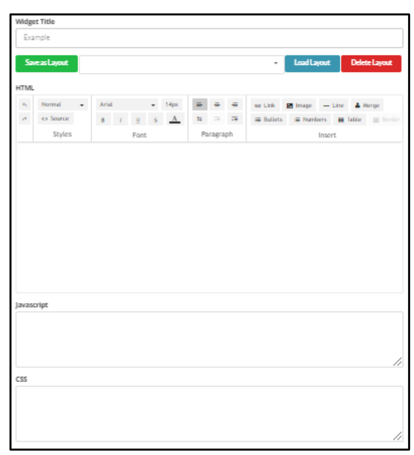
For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Custom Widget

This widget allows you to add a widget containing custom code to your custom dashboard. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:

- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can name the widget in the Widget Title field.
- At any time, you can save the custom widget you’re working on as a layout, so it can easily be accessedfor future widgets.



- You can then load a pre-existing layout from a custom that you have saved as a layout before by finding it in the dropdown, and then clicking the Load Layout button.
- You can also delete a layout by selecting the layout from the dropdown and then selecting Delete Layout.
- Then, add your custom HTML, Javascript, or CSS code to the appropriate field in the sidebar as required.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Check-in Report

This widget allows you to view an automatic report of check-ins and check-outs from a facility. Hover over this widget and an Add to Dashboard button will appear.

When you click Add to Dashboard for this option:

- A Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you can name the widget in the Widget Title field.
- Then, select a facility from the Facility dropdown menu. For a list to be treated as a facility, it must have been assigned to a check-in element in a landing page. For more information on setting up a Facility, consult the QR Check-In section of the Landing Page user guide.
- Click the blue Add to Dashboard button at the bottom of the sidebar to add the widget or click the Cancel button to close the sidebar without adding the widget.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Event Launcher

This widget allows you to quickly launch an event from the list of pre-made templates. Hover over this widget and an Add to Dashboard button will appear.

Clicking this button will immediately add the widget to your custom dashboard.

For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

Active Events

This widget provides you with an overview of any events or incidents that are currently ongoing. Hover over this widget and an Add to Dashboard button will appear.

Clicking this button will immediately add the widget to your custom dashboard.

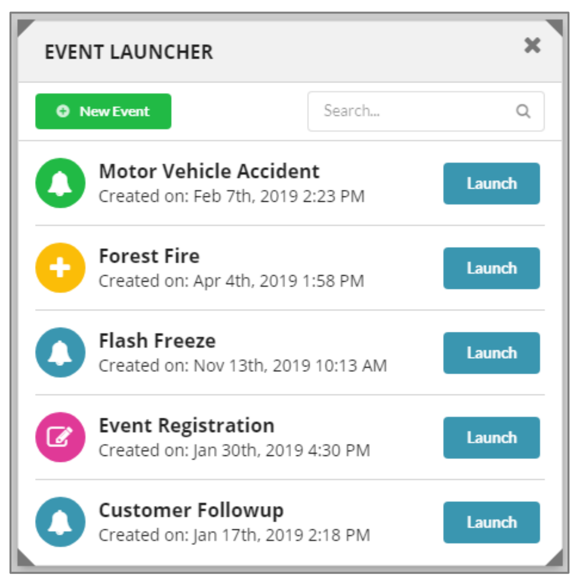
For more information about this widget, refer to the *Monitoring Dashboard Widgets* section of this guide.

[**Note:** You are able to add as many of one type of widget as you need to your dashboard. Once you have chosen the widgets you wish to add to your custom dashboard, click the blue Return to Dashboard button that appears on the bottom right-hand side of the screen and you will be directed back to your custom dashboard where you will see the widgets that you have added.]

Customize Widget Placement

You are able to arrange the dashboard widgets into whatever order you would like and modify the size of each widget on your dashboard.

To move a widget to another position on your dashboard:



- Hover your mouse over the title bar of the widget you would like to move. Your mouse will change to a four-way arrow, indicating that the widget can be dragged and dropped to a new location.
- Click and drag the widget to its new location on the dashboard. Other widgets will move out of the way as the one you are dragging moves over them.

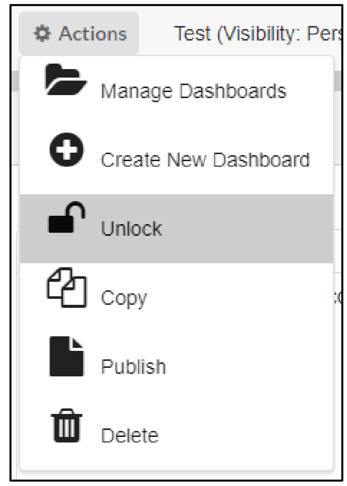
To modify the size of a widget:

- Hover your mouse over any of the widget's corners. Your cursor will change to a two-way arrow, indicating that the corner can be pulled out or pushed in to change the widget size.
- Click and drag the corner of the widget until it is the desired width and height.
- Other widgets will move out of the way as the widget's size expands or decreases.

Lock In/Unlock Your Dashboard Settings

Once you have configured your dashboard to your specifications, you are able to lock in your widget placements so they are unable to be modified by you or other users of the system.

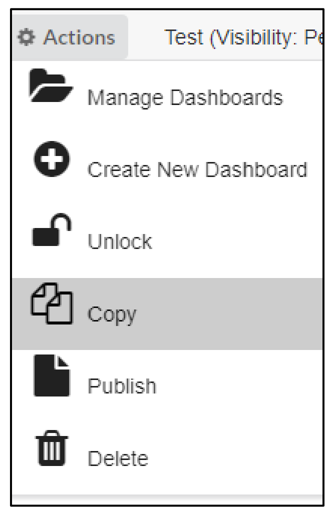
To lock in your dashboard settings:



- Proceed to the top left-hand corner of your screen where you will find a gray Actions button underneath the top black bar.
- Click this button to open a dropdown menu with the option to “Lock” your dashboard.
- Select this option and your dashboard will now be unable to be rearranged and you will be unable to add widgets or select different campaigns to view.

[**Note:** To unlock your dashboard, repeat the above steps but rather than “Lock” there will be an “Unlock” option that, when clicked, will allow you to make changes to your dashboard again.]

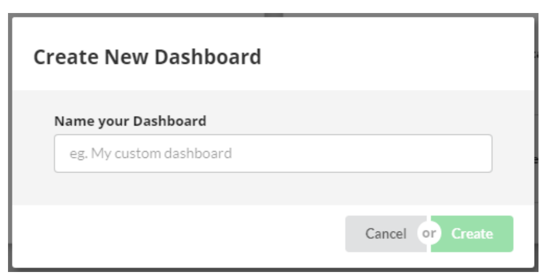
Copy the Custom Dashboard



If you have a custom dashboard that you like, you are able to make a copy of it to use as a template for a new custom dashboard.

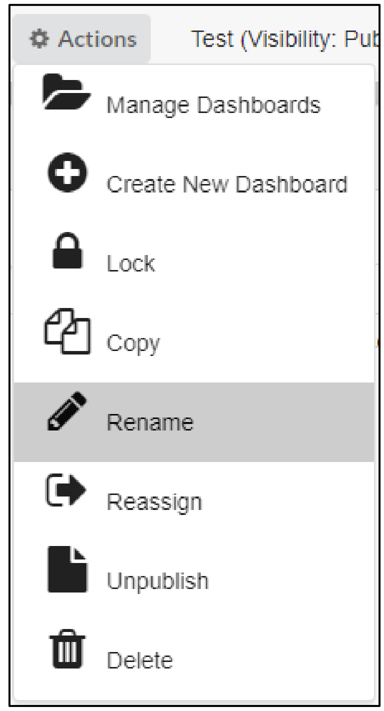
To copy the dashboard:

- Navigate to the top left-hand corner of your screen where you will find a gray button that says Actions with a gear icon.
- Click this button to open a dropdown menu with the option to Copy your dashboard.
- Select the Copy option and a pop-up window will appear asking you to name your new dashboard.
- Click OK when you have named the dashboard and you will be directed to your new, duplicated dashboard. Alternatively, click Cancel to return to the custom dashboard without making a copy.

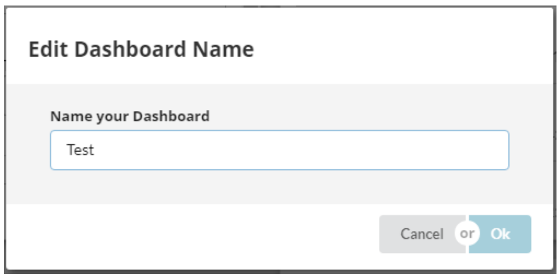


Edit the Dashboard Name

To edit the name of a custom dashboard you have created:

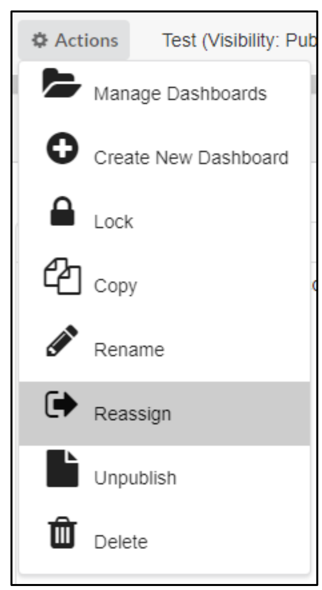


- Navigate to the top left-hand corner of your screen where you will find a gray button that says Actions with a gear icon.
- Click this button to open a dropdown menu where you will see the Rename option.
- Select this option to open a pop-up window where you can type in a new name for the dashboard.
- Click OK when you have renamed the dashboard. Alternatively, click Cancel to return to the custom dashboard without making a copy.

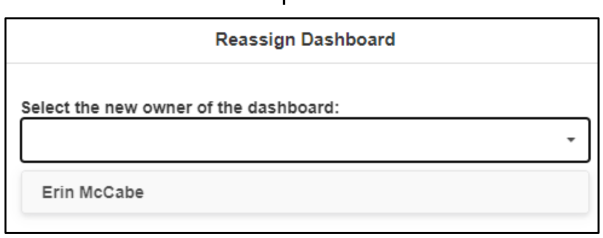


Re-assign the Dashboard

To re-assign a custom dashboard to a different owner from the dashboard view:

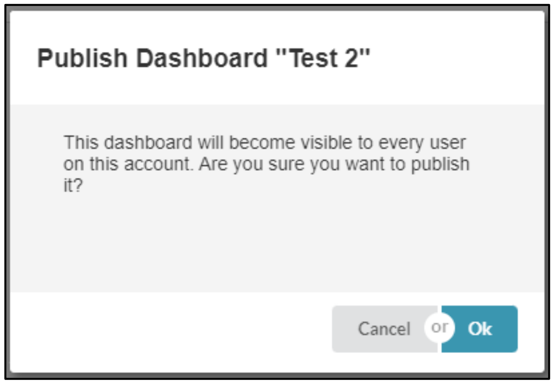


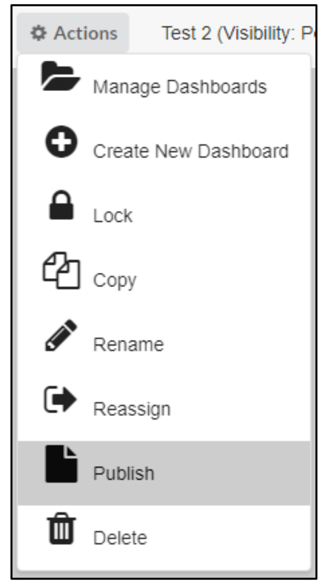
- Navigate to the top left-hand corner of your screen where you will find a gray button that says Actions with a gear icon.
- Click this button to open a dropdown menu where you will see the Re-assign option.
- Select the Re-assign option and a sidebar will appear from the right of your screen with a dropdown menu asking you to select a new owner for your dashboard.
- Choose from the available users in the dropdown list.
- Click the blue Save button when you have chosen a new owner for the dashboard. Alternatively, click Cancel to close the sidebar without choosing a new owner.



Publish/Unpublish the Dashboard

If you would like to publish/unpublish a custom dashboard from the dashboard view:

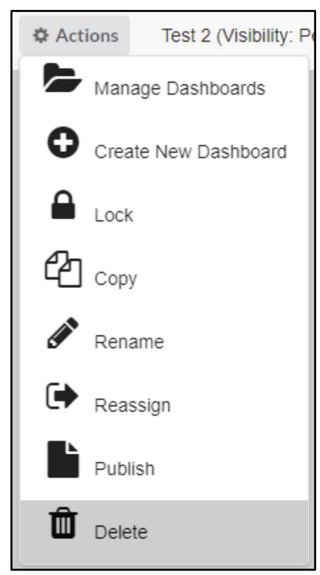




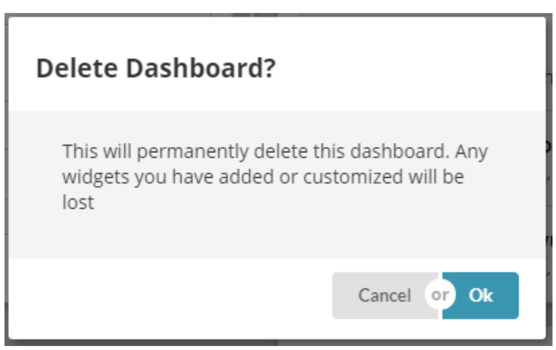
- Navigate to the top left-hand corner of your screen where you will find a gray button that says Actions with a gear icon.
- Click this button to open a dropdown menu where you will see the Publish/Unpublish option.
- Select the Publish/Unpublish option and a pop-up window will appear asking you to confirm you wish to publish or unpublish your dashboard.
- Click the blue OK button to confirm and close the pop-up. Alternatively, click Cancel to close the pop-up without changing the dashboard's published status.

Delete the Dashboard

If you would like to delete a custom dashboard and all its information from the dashboard view:



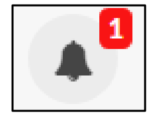
- Navigate to the top left-hand corner of your screen where you will find a gray button that says Actions with a gear icon.
- Click this button to open a dropdown menu where you will see the Delete option.



- Select this option and a pop-up window will appear asking you to confirm you would like to delete the dashboard and all its widgets and settings.
- Click the Delete button to confirm the deletion and return to the main Default Dashboard. Or, click Cancel to close the pop-up window without deleting the custom dashboard.

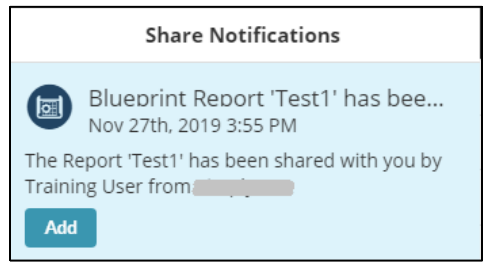
View Share Notifications

Whenever another user in your SimplyCast account shares a blueprint reporting widget with your account, account group, or network, you will receive a notification indicating that the report was shared with you.



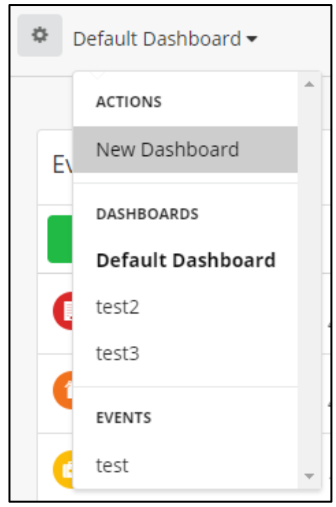
To view any shared notifications you have received:

- Navigate to the top right-hand corner of your custom dashboard where you will find a gray bell button underneath the top black bar, next to the blue Add Widgets button. If you have any new notifications, you will see a red marker appear over the button.
- Click this button to open a sidebar menu from the right side of your screen.
- If you have any new share notifications, you will be able to see them in this sidebar. If the sidebar is empty, this means you have no new share notifications.
  - > For each new notification you will see a description of newly granted access, as well as a blue Add button that you can click to add the widget to your Command Hub dashboard.



- Click the blue View all Share Notifications button appearing at the bottom of the sidebar to view all of your recent share notifications and add any of the shared widgets to your dashboard. Alternatively, click Close to close the sidebar without viewing your share notifications.

Event Dashboard



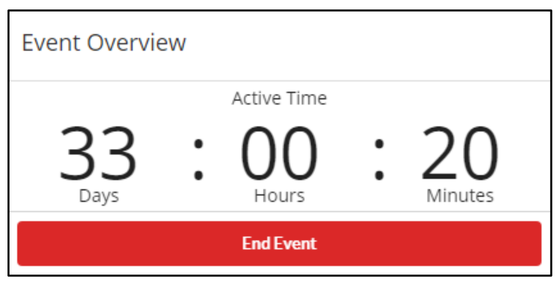
Event dashboards only exist in Command Hub whenever you have an active event. When you first launch an event template from either the Event application (refer to the Event section to learn more) or from the Event Launcher widget on a custom or default dashboard, the Event dashboard will appear as a dashboard dedicated to that particular event.

You can switch between your Event dashboard and your default and custom dashboards by navigating to the gray gear button at the top left of your screen next to the dashboard name and choosing the dashboard you would like to access.

When the Event dashboard opens on your screen, there are three widgets that are added by default:

- Event Overview
- Campaign Management
- Event Task List

Event Overview



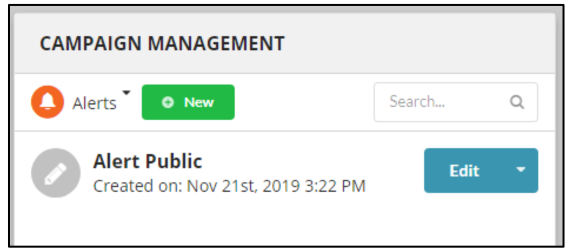
The Event Overview widget shows you a clock indicating the number of days, hours, and minutes that the current event has been active for.

You are also able to end the active event from this widget. To end the event, click on the red End Event button that appears at the bottom of the Event Overview widget.

Campaign Management

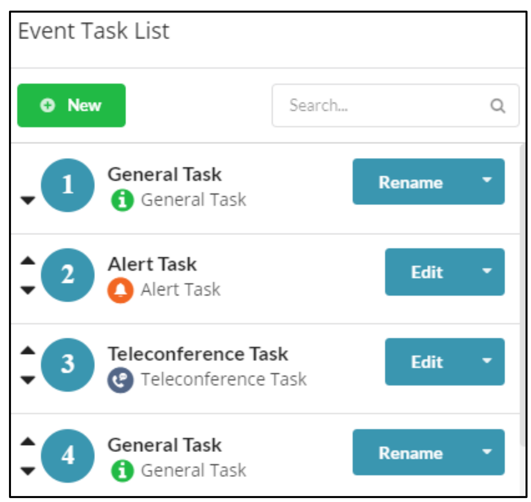
The Campaign Management widget allows you to easily sort through the tasks that need to be completed, as well as edit any of these tasks.

To view all tasks within a certain channel:



- Locate the dropdown menu on the left side of the widget directly underneath the Campaign Management header.
- The widget will show you all of your alerts by default, but by clicking on the dropdown, you will see a list of all the channels you can sort your tasks by. Choose a channel to see all the created tasks/campaigns associated with that channel for this event template.
- Next to every task there is an icon. If the icon is colored gray with a pencil, the task has not been completed and the content can be edited by clicking the blue Edit button next to the corresponding task, which will direct you to the setup process for that task/campaign.
- If the icon is blue, this means the campaign is in the process of being sent. You can abort the sending of Alerts campaigns by clicking the blue Abort that is in place of the blue Edit button across from the campaign.
- If the icon displays a green checkmark, the task has been completed and you can view the associated report for the task by clicking the blue Report button on the right.
- Create a new campaign (that is not part of the set task list appearing in the Event Task List widget) by clicking the green New button beside the dropdown menu. A pop-up menu will appear where you can name your new campaign. Refer to the respective channel's user guide for more information on how to set up a campaign.
- Search for a specific campaign by typing into the search bar located to the right of the module dropdown menu.

Event Task List

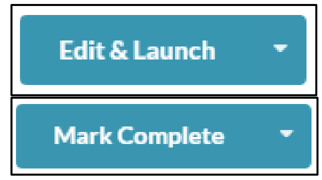


The Event Task List widget displays the various tasks you have created in the event template that need to be completed during an active event. (Refer to the *Create a New Draft* section to learn more about event templates). Each task is numbered to reflect when it should be completed during the ongoing event, with the most urgent task at the top of the list. Below the name of each task you are able to see the type of task it is (Alert, Recall, etc.).

To search for a specific task in the Event Task List:

- Type the name of the task into the search bar located at the top left side of the Event Task List widget, next to the Filter button.
- Your task list will begin to filter automatically to match the typed-in text, in the order in which the tasks are prioritized.

To edit and launch a task:



- Click on the blue Edit & Launch button appearing next to the task you wish to launch (except in the case of a general task, which will have a Mark Complete button beside it instead).

[**Note:** You are able to launch tasks out of order, for example, launching Task 3 before Task 1.]

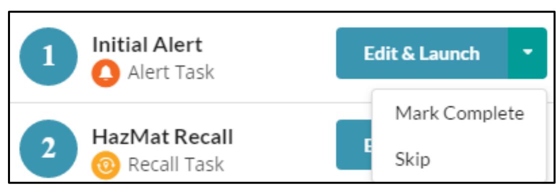
- You will be directed into the setup process for this task where you will see the templated information for this task. Edit any of the information as necessary and proceed to the end of the setup process. Refer to the respective channel's user guide for more information regarding the campaign setup process.
- Click the blue Complete button at the bottom right-hand corner and your task will be launched.

Just like a custom dashboard, you can add and remove other widgets for each task relevant to the specific event and have them display up-to-date information on the Event Dashboard. Refer to the Add Widgets section for more information regarding the available widgets.

You are also able to skip any task you do not wish to complete.

To skip a task:

- Locate the downward-facing arrow on the right side of the blue Edit & Launch button next to the task you wish to skip.
- When this arrow button is clicked, a dropdown menu with two options appears. The second of these two options is Skip.
- Click the Skip option and it will change the numbered icon next to that task in the Event Task List widget to a green checkmark.



To mark a task complete:

- Locate the downward-facing arrow on the right side of the blue Edit & Launch button next to the task you wish to mark complete.
- When this arrow button is clicked, a dropdown menu with two options appears. The first of these two options is Mark Complete.
- Click this option and it will change the numbered icon next to that task in the Event Task List widget to a green checkmark.

[**Note:** If you mistakenly skip a task or mark it complete, and would like to complete it at a later time, you are still able to do so by finding it in the Campaign Management widget and launching the task from there. Refer to *Campaign Management* section for more information about this widget.]

[**Note:** The only difference between skipping a task and marking it complete will be how it is reported in the Event Report. Refer to the *Reports* section learn more about Event Reports.]

At the top right-hand corner of the dashboard, you will see two buttons: a green New Campaign button and a blue Add Widgets button. Clicking the New Campaign button will bring up a dropdown menu where you can choose to create a new alert, live status, recall, or teleconference.

Clicking any of these options will direct you to the setup process for that particular channel. Refer to the associated user guides for more information.

Clicking the Add Widgets button will direct you to a page with the nine available widgets you can add to the dashboard. Refer to the *Add Widgets* section for more information about adding widgets.

Monitoring Dashboard Widgets

The purpose of adding widgets to your dashboard is so that you can view as much incoming information from your various campaigns as possible in one centralized location. This helps you to develop a fully rounded common operating picture, allowing you to coordinate all parties involved and come up with viable strategies on how best to move forward.

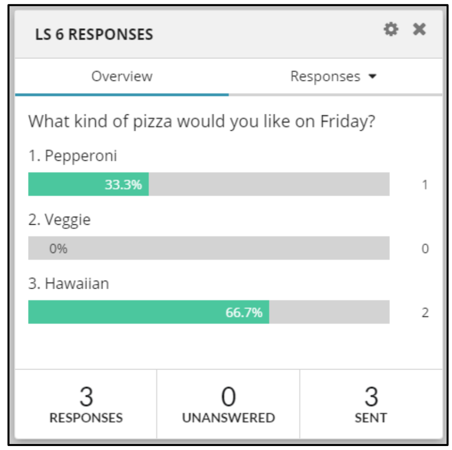
Each specific widget provides you with certain reporting information regarding a campaign.

Here is a breakdown of what information is able to be viewed within each widget:

Live Survey Responses

At the top of this widget you will see the title of the live survey you are monitoring responses for. To the right of the title, there is are two buttons: a gear button and an “X” button.

- Click the gear button to bring up a sidebar to the right of your screen with a dropdown menu.
- Select the live survey you wish to monitor responses for from the options in the dropdown (if different than the live survey you selected when adding the widget to the dashboard).
- Click the blue Save Settings button at the bottom of the sidebar once you have chosen a live survey to display, or the Cancel button to close the sidebar without making any changes.
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

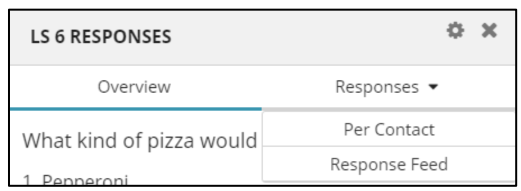


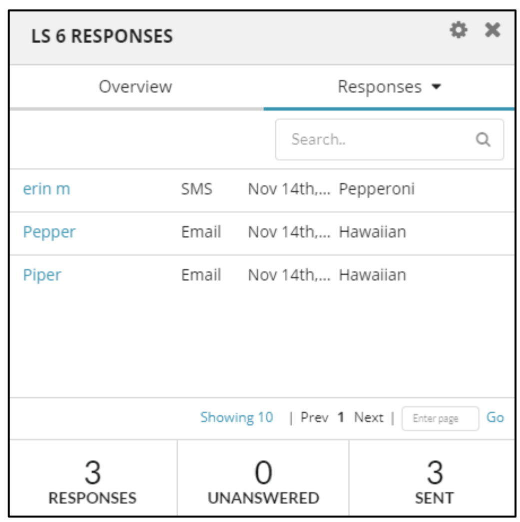
Below the title of the live survey at the top of the widget, you will see two tabs: Overview and Responses.

[**Note:** For open-ended live surveys, only the Responses tab will be available.]

In the Overview tab, you are able to see the visual representation of the responses you have received to your survey request as a bar graph.

To the right of the Overview tab you will see the Responses dropdown menu. Clicking the dropdown menu will show you two options: Per Contact and Response Feed. Choosing the Per Contact option will switch the widget to the contact view, where you can see the most recent response received from the live survey recipient.





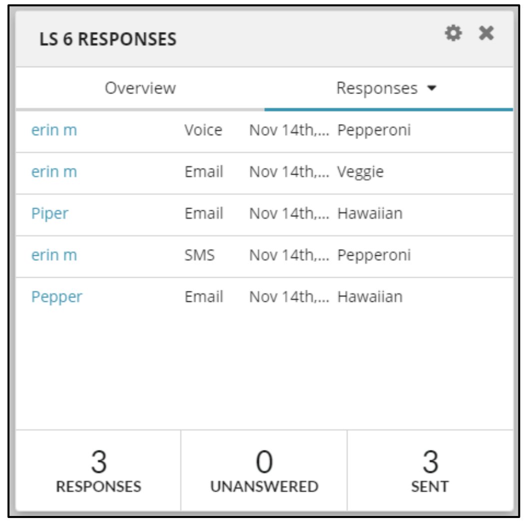
Here, you are able to see:

- A list of each of the contacts who responded to your survey
- The delivery method (email, SMS or voice in the case of a multiple choice live survey) the contact used to respond
- The time the contact responded to the survey (hover over the column to view the entire response date and time)
- The response given by the contact

Search for contacts by typing out a query in the search bar at the top right of the widget. Results will automatically filter.

Navigate multiple pages of contact responses by using the page numbers at the bottom of the widget. Click on the page number to visit or click Next to proceed to the next page of contacts. If you know the page you want to go to, enter the page number in the field provided and select Go.

The second option in the Responses dropdown menu is the Response Feed option. Choosing this option will show you a page with all the responses your live survey has received.



[**Note:** This option will display all responses received from each contact, including multiple responses.]

For each response you are able to see:

- The name of the contact who responded
- The delivery method (email, SMS, or voice in the case of a multiple choice live survey) the contact used to respond to the live survey
- The time the contact responded to the survey (hover over the column to view the entire response date and time)
- The response given by the contact

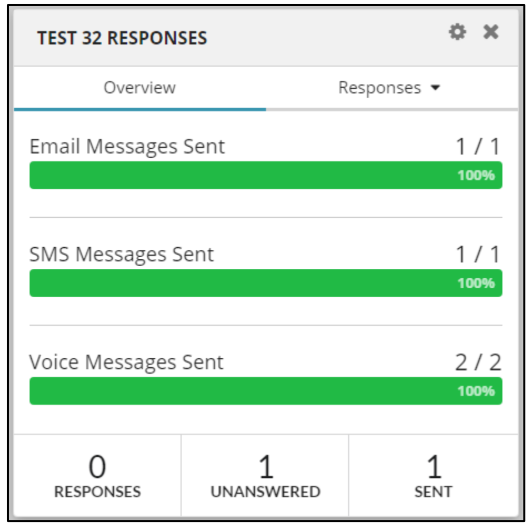
Clicking the name of any contact in either of these two tabs will direct you to that contact's profile page in the CRM where you can view and edit their information. Refer to the *SimplyCast CRM User Guide* for more information on managing contact information.

At the bottom of the Live Survey Responses widget there are three blocks. The first block indicates the total number of responses the live survey received, the second block indicates the total number of sent surveys that remain unanswered, and the third block indicates the total number of contacts who were sent the live survey.

Alerts Status

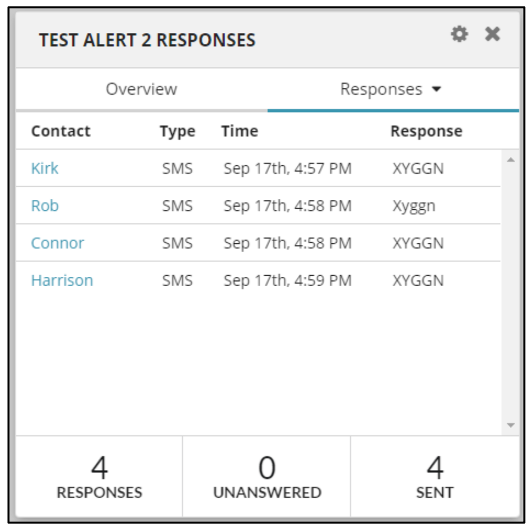
At the top of this widget you will see the title of the alert you are monitoring. To the right of the title, there is are two buttons: a gear button and an "X" button.

- Click the gear button to bring up a sidebar to the right of your screen with a dropdown menu.
- Select the alert you wish to monitor responses for from the options in the dropdown (if different than the alert you selected when adding the widget to the dashboard).



- Click the blue Save Settings button at the bottom of the sidebar once you have chosen an alert to display, or the Cancel button to close the sidebar without making any changes.
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

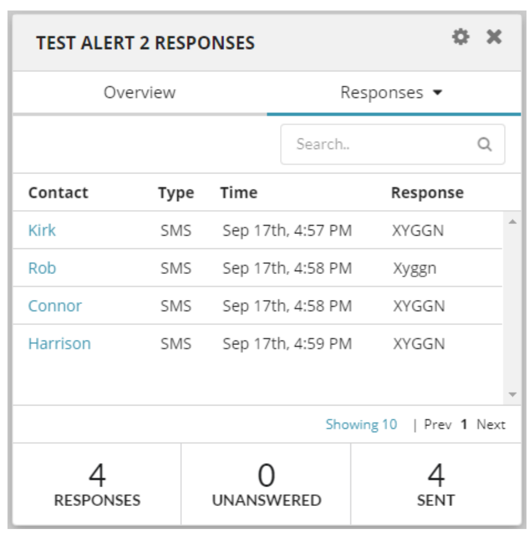
Below the title of the alert at the top of the widget, you will see two tabs: Overview and Responses. In the Overview tab, you are able to see the visual representation of the number of alerts sent successfully and unsuccessfully via each channel via a bar graph.



To the right of the Overview tab you will see the Responses dropdown menu. Clicking the dropdown menu will provide you with two options: Response Feed and All Responses. Choosing the Response Feed option will direct you to a page where you are able to see which contacts have responded to acknowledge that they have received your alert.

In this tab you are able to see:

- The name of the contact who responded
- The delivery type (email, SMS, or voice) the contact used to respond to the alert
- The time the contact responded to the alert
- The response given by the contact



The second option in the Responses dropdown menu is the All Responses option. Choosing this option will show you a page with all the responses your alert has received.

For each response you are able to see:

- The name of the contact who responded
- The delivery method (email, SMS, or voice) the contact used to respond to the alert
- The time the contact responded to the survey
- The response given by the contact

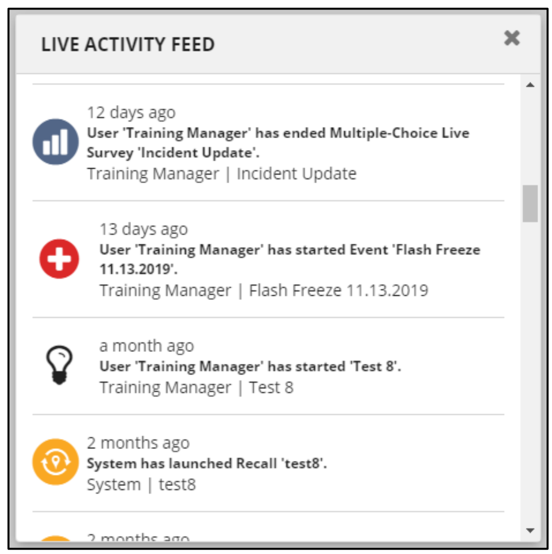
Search for contacts by typing out a query in the search bar at the top right of the widget. Results will automatically filter.

Navigate multiple pages of contact responses by using the page numbers at the bottom of the widget. Click on the page number to visit or click Next to proceed to the next page of contacts. If you know the page you want to go to, enter the page number in the field provided and select Go.

Clicking the name of any contact in either of these two tabs will direct you to that contact's profile page in the CRM where you can view and edit their information. Refer to the *SimplyCast CRM User Guide* for more information on managing contact information.

At the bottom of the Alerts Status widget there are three blocks. The first block indicates the total number of responses the alert received, the second block indicates the total number of sent alerts that remain unanswered, and the third block indicates the total number of contacts that were sent the alert.

Live Activity Feed

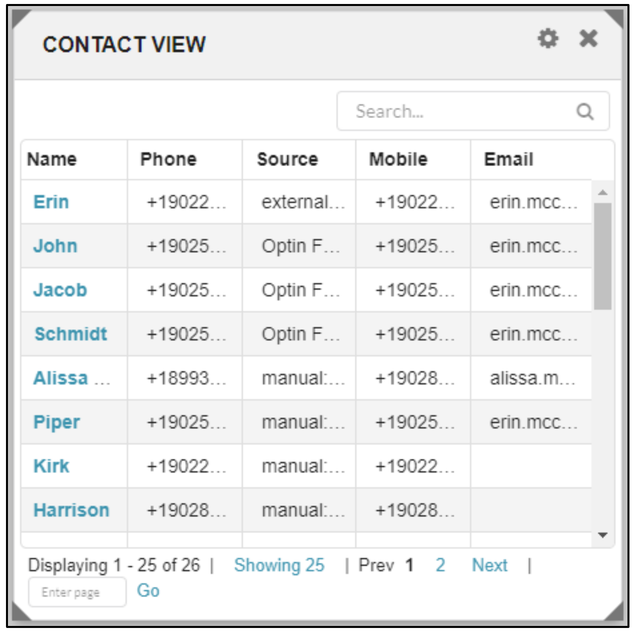


This widget will automatically update in near real time with information pertaining to tasks and actions that members of your account network are performing. When this widget is placed on a custom dashboard, it will provide updates that are not event-specific. You will see the general activity of all network/account members and any campaigns they've launched.

[**Note:** If this widget is placed on an event dashboard, it will only be updated with activity that is directly associated with that particular ongoing event.]

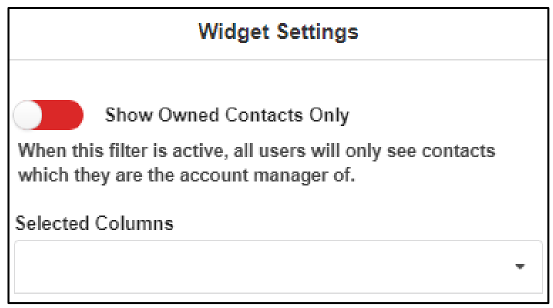
For each new activity, you will be able to see how long ago it was performed, who performed it, and the task's name. To the left of this information, you will see the icon of the module associated with the activity (e.g. the orange Alerts icon when a new alert has been launched). Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Contact View



At the top of this widget you will see the name of the Contact View widget. To the right of the name, there are two buttons: a gear button and an "X" button.

- Click the gear button to bring up a Widget Settings sidebar will open on the right-hand side of the Add Widgets screen where you select the information columns you would like to view on the dashboard for each contact from the Selected Columns dropdown menu (if different from the columns you selected upon adding the widget to the dashboard.
- You can click on the toggle button to enable the Show Owned Contacts Only feature, which will only display the contacts an individual user is the account manager of when they view the Command Hub dashboard. To enable this option, make sure the toggle is pointed to the right and colored green.

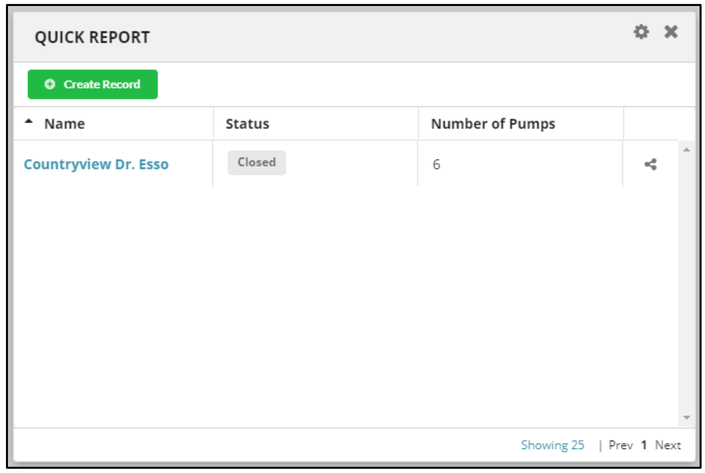


- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.

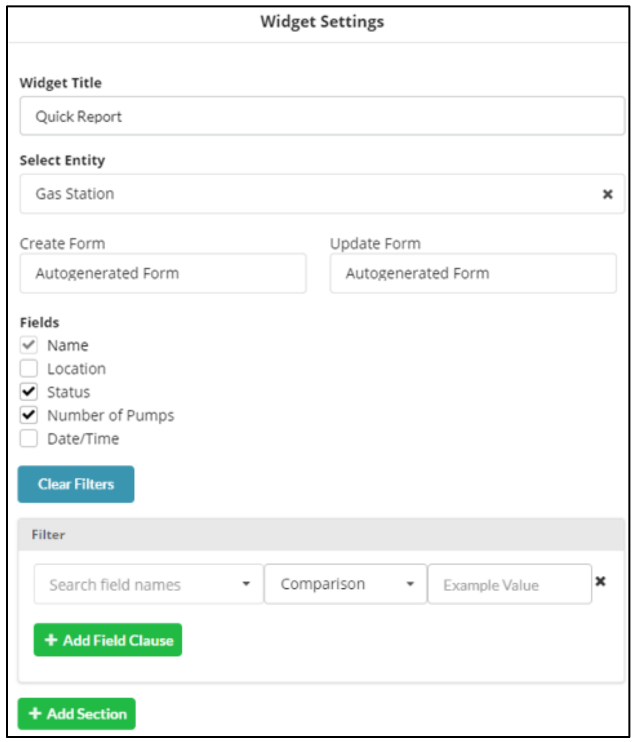
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Once you have chosen the fields to display in your Contact View widget, the contacts and their information will appear in the widget. Click on the name of a contact to be directed to their CRM profile.

Blueprint Quick Report



At the top of this widget you will see the title of the blueprint you are monitoring. To the right of the title, there is are two buttons: a gear button and an "X" button.



- Click the gear button to bring up a sidebar to the right of your screen.
- In the Widget Title field you can change the name that appears at the top of the Blueprint Quick Report widget. Type the new widget name into the field.
- Select the entity (blueprint) you wish to monitor data for from the options in the Select Entity dropdown (if different than the blueprint you selected when adding the widget to the dashboard).
- In the next field set, choose which blueprint form to use for creating and updating records. Refer to the *SimplyCast Blueprints & Map User Guide* for more information about blueprint forms. If you have not created any custom forms for the chosen blueprint entity, the fields will be populated with the "Autogenerated Form" option.
- Next, choose which entity fields you would like to display in the Blueprint Quick Report widget by checking off the boxes next to your desired field names.
- To filter which records you see in your Blueprint Quick Report widget, you can create a filter in the bottom section of the Widget Settings sidebar. First, choose the field you would like to filter your records by from the dropdown menu on the left.
- In the second dropdown field, choose the parameter you wish your chosen field to adhere to (e.g. when choosing a field with a dropdown data type, your parameter options are: is equal to, is not equal to, is empty, is not empty, is any of, is none of).
- Then, depending on the field selected, you may or may not be required to input a value in a third field that appears. If you see this third field, you will either need to choose a value from a dropdown or enter in a value yourself.
- Additional rules for the filter can be added using both the Add Field Clause and Add Section buttons.

- You can also clear any active filters by clicking on the Clear Filters button.
- When finished, click the blue Save Settings button at the bottom of the sidebar once you have chosen a blueprint to display, or the Cancel button to close the sidebar without making any changes.

- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Once you have chosen which data fields to display in your Blueprint Quick Report widget, these columns will be seen in your widget directly underneath the widget title. The information related to each of the records associated with the blueprint you selected will be listed in these columns, provided you have not added a filter, in which case only the records that meet the filter requirements will be displayed in the widget.

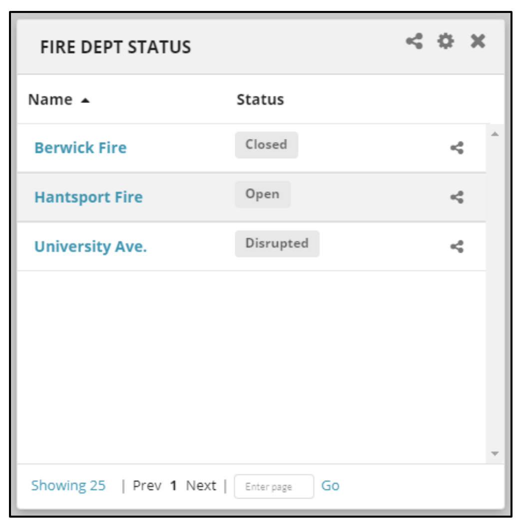
Every time a record associated with the blueprint is modified, the information displayed in the blueprint will be updated automatically in near real time.

To view records that are not on the first page of the widget:

- Navigate to the bottom of the list of objects where you will find the page numbers indicating the total number of objects associated with the current blueprint you are monitoring.
- Click either the page number you would like to visit to proceed to another page of objects or the Next button, which will take you to the next page of objects.
- Choose how many objects to display at a time by clicking the "Showing…" link located to the right of the number of displayed objects.

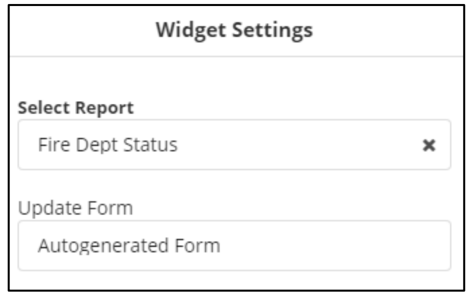
To learn how to create blueprints and records, refer to the *SimplyCast Blueprints & Maps User Guide*.

Blueprint Reporting



At the top of this widget you will see the title of the blueprint report you are monitoring. To the right of the title, there are three buttons: a sharing button, a gear button, and an "X" button.

- Click the gear button to bring up a sidebar to the right of your screen with two fields.
- In the first field you can change which blueprint report that appears on the Command Hub Dashboard. Select your desired report from the options in the Select Report dropdown (if different than the blueprint you selected when adding the widget to the dashboard).

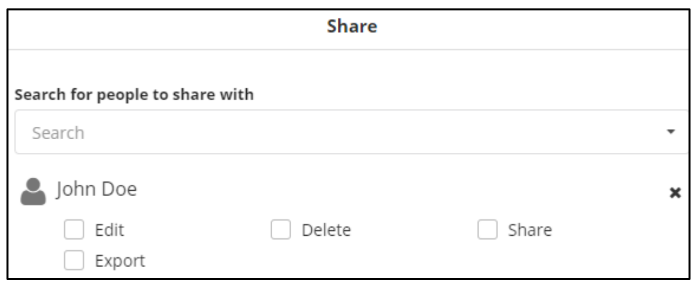


- Next, choose which blueprint form to use for updating records. Refer to the *SimplyCast Blueprints & Map User Guide* for more information about blueprint forms. If you have not created any custom forms for the chosen blueprint entity, the fields will be populated with the "Autogenerated Form" option.
- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Once you have chosen the report to display in your Blueprint Reporting widget, the data will appear in the widget. The information related to each of the records associated with the report you selected will be listed in the columns chosen when the report was created.

Every time a record associated with the blueprint report is modified, the information displayed in the Blueprint Reporting widget will be updated automatically in near real time.

To share the Blueprint Reporting widget with other members of your account network:



- Click the Share Widget button appearing at the top right of the widget, beside the gear button.
- A sidebar will open from the right of your screen where you are asked to choose who to share the widget with (users, accounts, or groups that are part of your network).
- Select a user, account, or group to share the widget with from the dropdown menu. A new section will appear below the dropdown field where you can manage the access level you wish to provide the "sharee."
- By checking off any of the checkboxes in this section you can give the "sharee" the ability to edit the reporting widget, delete the reporting widget, and/or further share the reporting widget.

[**Note:** Just by selecting a "sharee" from the dropdown menu you are giving them access to view the report. If you don't want to, you don't have to give them any additional privileges.]

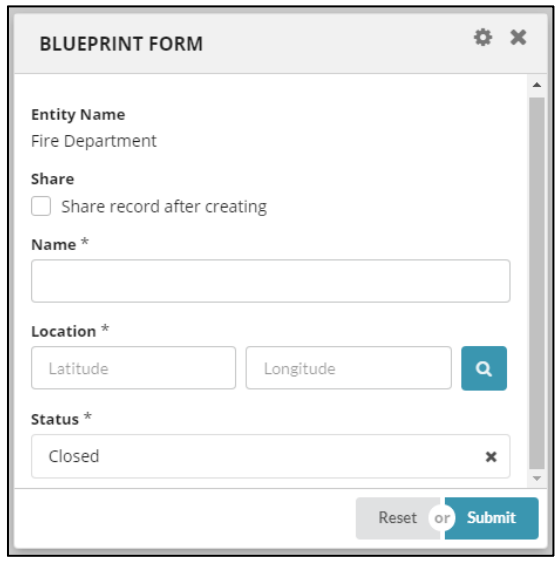
- Repeat for any other "sharees" you wish to share the widget with.
- When you have finished, click the blue Save button to share the widget with your selected users, accounts, and/or groups. Click Cancel to close the sidebar without sharing the widget.

To view data that is not on the first page of the Blueprint Reporting widget:

- Navigate to the bottom of the list of records where you will find the page numbers indicating the total number of records associated with the current blueprint report you are monitoring.
- Click either the page number you would like to visit to proceed to another page of records or the Next button, which will take you to the next page of records.
- Choose how many records to display at a time by clicking the “Showing…” link located to the right of the number of displayed records.

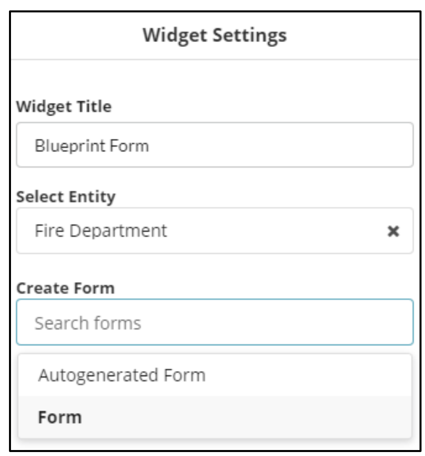
To learn how to create blueprint reports, refer to the *SimplyCast Blueprints & Maps User Guide*.

Blueprint Form



At the top of this widget you will see the title of the blueprint form you are displaying. To the right of the title, there are two buttons: a gear button and an “X” button.

- Click the gear button to bring up a sidebar to the right of your screen.
- In the first field you can name your Blueprint Form widget.
- Next, you can change which blueprint form appears on the Command Hub Dashboard. Select your desired blueprint entity from the options in the Select Entity dropdown (if different than the blueprint you selected when adding the widget to the dashboard).
- Next, choose which blueprint form to use for creating new records. If you have not created any custom forms for the chosen blueprint entity, the fields will be populated with the “Autogenerated Form” option.



[**Note:** You will only be able to select any “create” forms you may have created for an entity. You cannot view or select any “update” or “create and update” forms. Refer to the *SimplyCast Blueprints & Map User Guide* for more information about blueprint forms.]

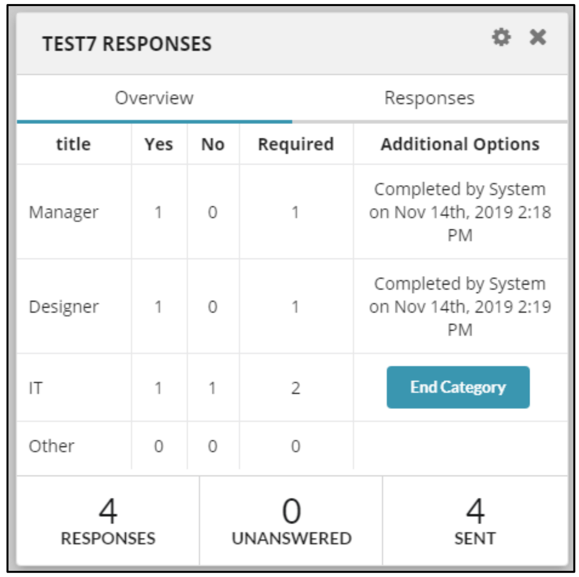
- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.

- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Once you have chosen the form to display in your Blueprint Form widget, the form fields will appear in the widget. To create a new record using the form, fill out the fields in the widget and click the blue Submit button.

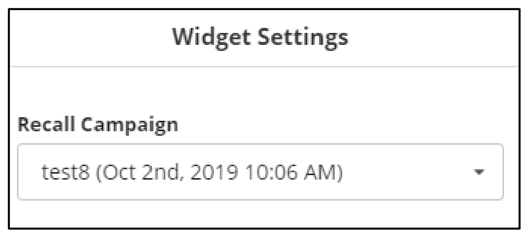
Clear any data that may be in any of the form fields by clicking the gray Reset button next to the Submit button (Or the back button, for multi-page Blueprint Forms).

Recall Status



At the top of this widget you will see the title of the recall you are monitoring. To the right of the title, there are two buttons: a gear button and an "X" button.

- Click the gear button to bring up a sidebar to the right of your screen with a dropdown menu.
- Select the recall you wish to monitor the status of from the options in the dropdown (if different than the recall you selected when adding the widget to the dashboard).
- Click the blue Save Settings button at the bottom of the sidebar once you have chosen a recall to display, or the Cancel button to close the sidebar without making any changes.
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.



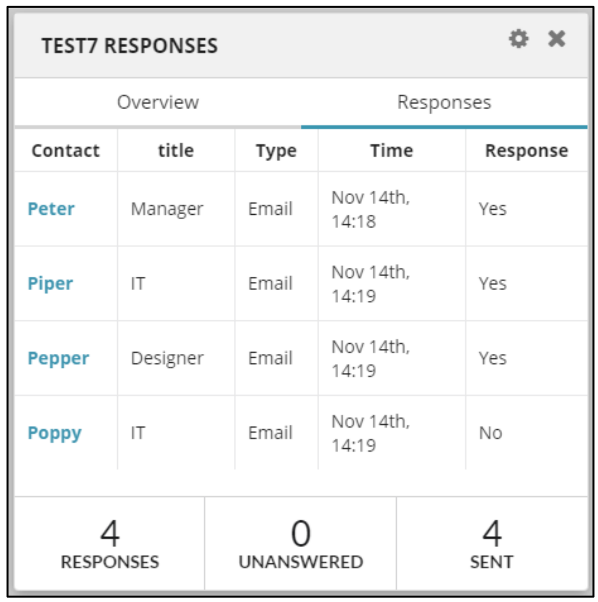
Below the title of the recall at the top of the widget, you will see two tabs: Overview and Responses. In the Overview tab, you are able to see a table with five columns of information displayed:

- **[CRM field]:** This column will be named after the CRM column that you have told the system to look at when determining the responder's role (for example, Title or Responder Type). Each of the options you created for this recall will appear in this column as well as an "Other" option which will record responses from contacts who don't match any of the available categories.
- **Yes:** This column refers to the number of contacts in the previous column's category who have confirmed their ability to respond to the recall.

- **No:** This column refers to the number of contacts in the first column's category who have confirmed that they are unable to respond to the recall.
- **Required:** This column refers to the number of responders you have determined to be required for each of the category types when creating this recall.
- **Additional Options:** In this column you will see a blue button that will allow you to end the recall for a specific category. Clicking the End Category button means that no more responses will be recorded in the recall report for that category. Once clicked, the button will disappear beside the ended category and in its place you will see text saying that the recall has been completed, by whom, as well as when it was ended.

[**Note:** Depending on whether you have set a category to be manually or automatically ended, a category may be completed without you having to click the button. Refer to the *SimplyCast Recall User Guide* for more information about the recall setup.]

To the right of the Overview tab you will see the Responses tab. Clicking the tab will direct you to a page where you are able to see which contacts have responded to acknowledge that they have received your recall.



In this tab you are able to see:

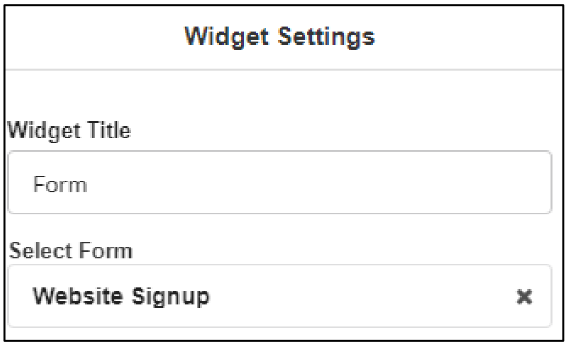
- The name of the contact who responded
- The responder category they are associated with (this column will reflect the name of the CRM column you selected when creating the recall)
- The delivery type (email, SMS, or voice) the responder used to respond to the recall
- The time the responder responded to the recall
- The response given by the responder
- Any additional information from any extra columns you may have selected to display.

Clicking the name of any contact in the Responses tab will direct you to that contact's profile page in the CRM where you can view and edit their information. Refer to the *SimplyCast CRM User Guide* for more information on managing contact information.

At the bottom of the Recall Status widget there are three blocks. The first block indicates the total number of responses the recall received, the second block indicates the total number of sent recalls that remain unanswered, and the third block indicates the total number of contacts who were sent the recall.

Form Submission

At the top of this widget you will see the title of the Form widget you are displaying. To the right of the title, there are two buttons: a gear button and an "X" button.



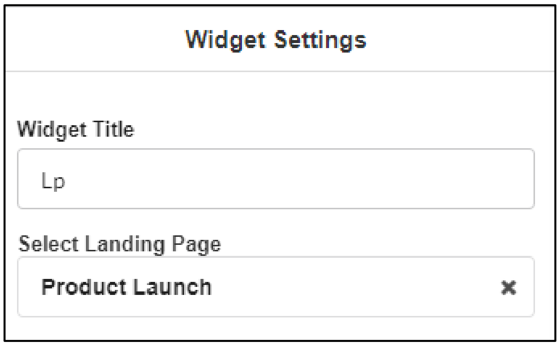
- Click the gear button to bring up a sidebar to the right of your screen.
- In the first field you can name your Form widget.
- Next, you can change which form appears on the Command Hub Dashboard. Select your desired form from the options in the Select Form dropdown (if different than the form you selected when adding the widget to the dashboard).
- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.

- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Once you have chosen the form to display in your Form widget, the form fields will appear in the widget. To create a new submission using the form, fill out the fields in the widget and click the form's Submit button.

Landing Page

At the top of this widget you will see the title of the Landing Page widget you are displaying. To the right of the title, there are two buttons: a gear button and an "X" button.

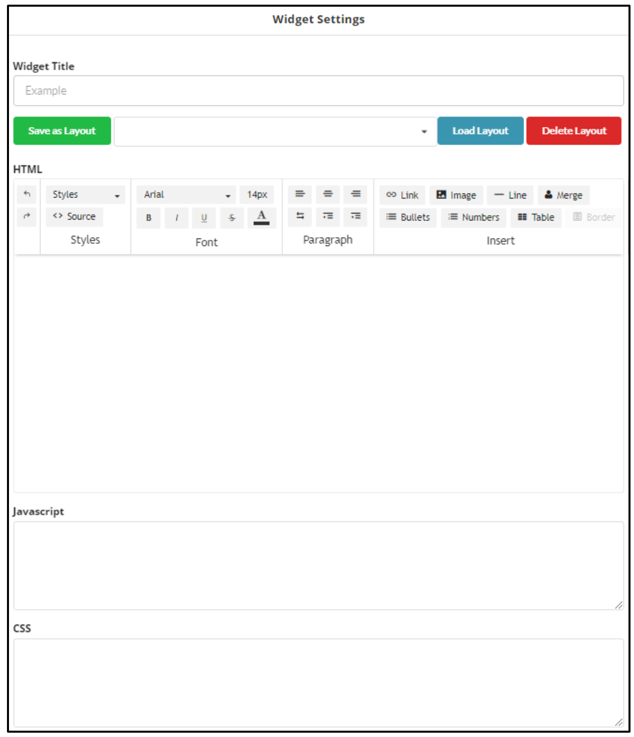


- Click the gear button to bring up a sidebar to the right of your screen.
- In the first field you can name your Landing Page widget.
- Next, you can change which landing page appears on the Command Hub Dashboard. Select your desired landing page from the options in the Select Landing Page dropdown (if different than the landing page you selected when adding the widget to the dashboard).

- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

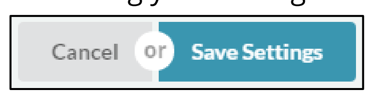
Once you have chosen the landing page to display in your Landing Page widget, the page will appear in the widget, along with any associated forms or links. To create a new submission using a landing page form, fill out the fields in the widget and click the form's Submit button.

Custom Widget



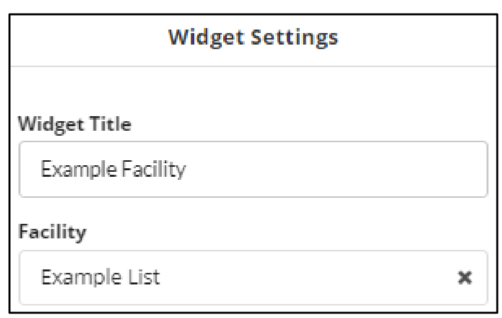
At the top of this widget you will see the title of the Custom widget you are displaying. To the right of the title, there are two buttons: a gear button and an "X" button.

- Click the gear button to bring up a sidebar to the right of your screen.
- In the first field you can name your Custom widget.
- Next, you can change the code that appears in the widget on the Command Hub Dashboard. Enter the desired code into the HTML, JavaScript, or CSS textboxes (if different than the landing page you selected when adding the widget to the dashboard).
- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.
- Clicking the "X" button next to the gear button will delete this widget from your dashboard.



Once you have added the code to display in your Custom widget, it will appear in the widget on the Command Hub dashboard.

Check-In Report

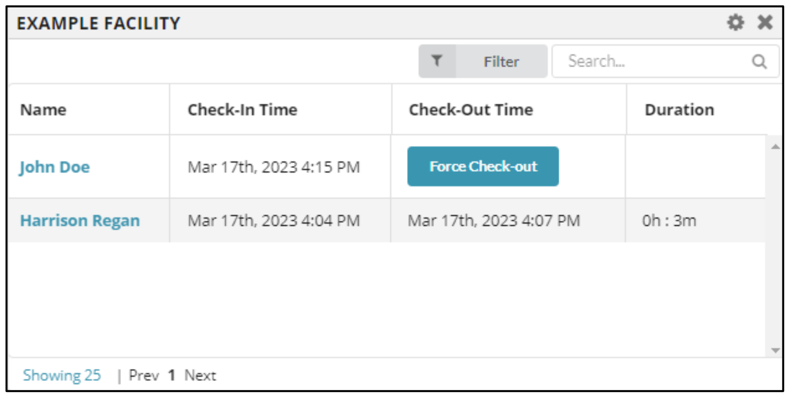


At the top of this widget, you will see the title of the Check-In Report widget you are displaying. To the right of the title, there are two buttons: a gear button and an "X" button.

- Click the gear button to bring up a sidebar to the right of your screen.
- In the first field you can name your Check-In Report widget.
- In the second field, you can select the Facility associated with the Report.
- Click the blue Save Settings button at the bottom of the sidebar once you have finished configuring your settings or click Cancel to close the sidebar without saving your settings.

- Clicking the "X" button next to the gear button will delete this widget from your dashboard.

Below the title at the top of the widget, you will see a table with four columns of information displayed:



- **Name:** This column displays the name of a contact has checked in to the facility
- **Check-In Time:** This column displays the date and time a contact was checked in.
- **Check-Out Time:** In this column you will see the time an individual checked out from the facility. If they are still checked-in, there will instead be a blue button that will allow you to manually check-out the corresponding contact.
- **Duration:** This column displays the amount of time a checked-out contact was checked in for.

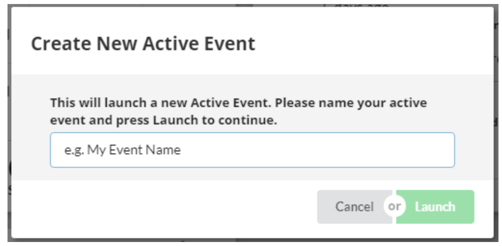
Clicking the name of any contact will direct you to that contact's profile page in the CRM where you can view and edit their information. Refer to the SimplyCast CRM User Guide for more information on managing contact information.

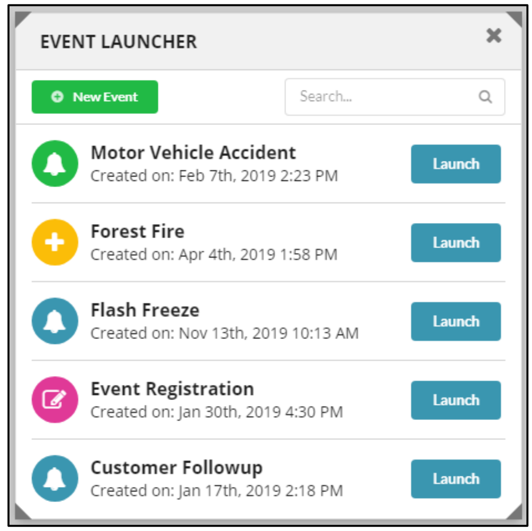
To search for a specific contact, begin typing the name of the contact you are looking for in the search bar located at the top of the widget on the right-hand side. Results will begin to filter automatically.

Event Launcher

This widget will allow you to launch a new event or event template whenever the need arises.

At the top of this widget you will see a green New Event button. This will allow you to launch a brand-new active event that is not based off a pre-made template. Clicking this button will bring up a pop-up window asking you to name your new event. Once you name the event, click the green Launch button to continue to the event dashboard. Refer to the *Event Dashboard* section for more information regarding event dashboards.

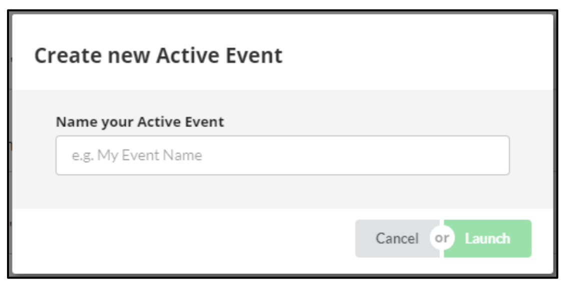




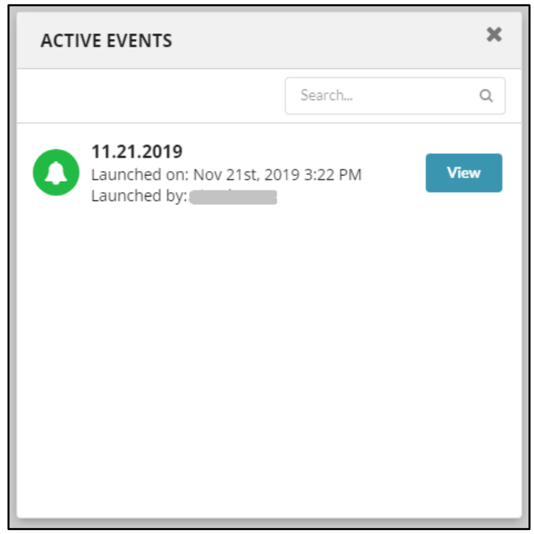
Below the green New Event button you will see the list of all your published event templates. To the right of each template is a blue Launch button that, when clicked, will initiate an active event using that template and direct you to the event dashboard for the new event. If there is nothing in the space below the button, you have not created/published any event templates. For more information about creating event drafts and templates, refer to the *Event Draft Setup* and *Event Templates* sections respectively.

To search for a specific event template that you would like to launch, begin typing the name of the template you are looking for in the search bar located to the right of the green New Event button at the top of the widget. Results will begin to filter automatically.

To launch a new active event, click the blue Launch button across from the event template you wish to launch. A pop-up menu will appear where you can provide a name for your new active event. After naming the event, click the green Launch button to be directed to the Event dashboard where you can monitor and manage your event.



Active Events



This widget will allow you to view a list of all the currently ongoing events that have been launched by members of your account network.

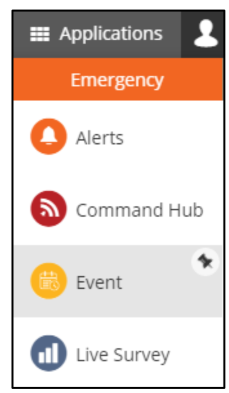
For each active event, you are provided the following information:

- The name of the ongoing event
- The date and time the event was launched
- The network account that launched the event

For events that you have permission to access, you will also see a blue View button to the right of the event description. Clicking this button will direct you to the event dashboard for this event.

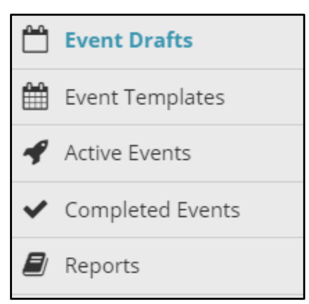
To search for a specific active event, begin typing the name of the template you are looking for in the search bar located at the top of the widget on the right-hand side. Results will begin to filter automatically.

Event



An event is essentially templated communication process that can be executed and managed on a dashboard in Command Hub. Each separate communication process is its own "event" and must be managed as such. In the Event module, you can create drafts of specific communication processes for various situations with step-by-step tasks and pre-created content. You can then create templates from these drafts and publish them to the Event Launcher widget on your Command Hub Dashboard where they can be launched as needed.

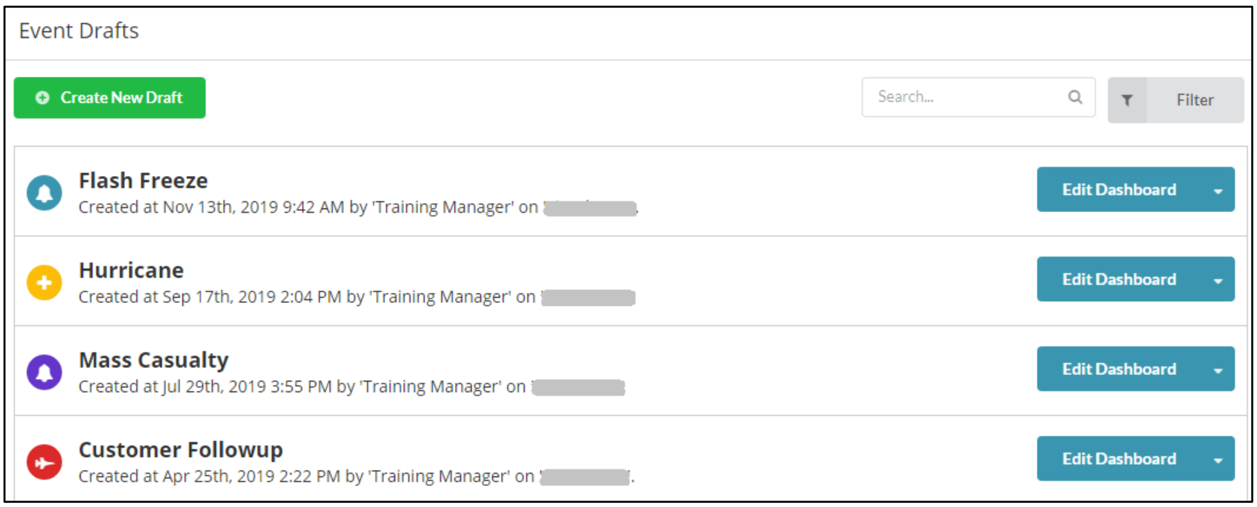
The dashboard for the Event application can be accessed by navigating to the Applications menu in the top black bar on your screen and selecting Event from the options that appear. Once you are on the Event dashboard, there are five tabs on the left-hand side of your screen.



- Event Drafts
- Event Templates
- Active Events
- Completed Events
- Reports

Event Drafts

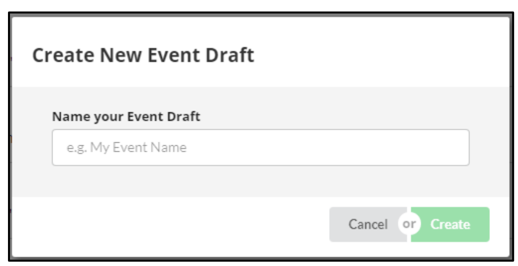
The first tab in the menu on the left side of your screen is Event Drafts and this is the page where you will automatically be brought when you first enter the Event application. Creating a draft of your communication process is the first step in creating an event template that can be launched from the Event Launcher widget.



In the Event Drafts tab, you are able to:

Create a New Draft

If you wish to create a new event draft, there is a green Create New Draft button at the top of the Event Drafts screen on the left-hand side.



Clicking this button will open a pop-up window where you can name the new draft. Enter a name in the field provided and click the green Create button to proceed to the main event draft creation process. Click Cancel to close the pop-up without creating a new event draft.

Refer to the *Event Draft Setup* section to learn how to create and set up your event draft.

View the List of Drafts

Below the Create New Draft button, you will see a list of all of the event drafts you have created, with the most recent appearing at the top. If there are no drafts listed, this means you have not yet created one.

For each draft you will be able to see the following information:

- The colored icon given to the draft
- The name of the event draft
- The date and time the draft was created
- The user who created the event draft
- The network account the creator belongs to
- Any descriptions or labels given to the event draft by the creator

Navigate Multiple Draft Pages

To navigate through the pages of drafts:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of event drafts you have created.
- Click either the page number you would like to visit to proceed to another page of drafts or click the Next button, which will take you to the next page of drafts. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.
- You can also choose how many drafts to display at a time by clicking on the "Showing..." link located to the right of the number of displayed drafts.

Search for Event Drafts

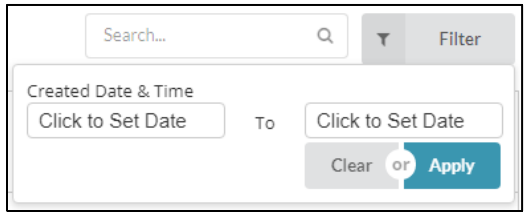
If you are looking for a particular event draft you have already created, you can easily search through your drafts in the list on the Event Drafts page by:

- Selecting the search box that appears in the top right-hand corner of the page next to the gray Filter button.
- Typing in the text that you would like the system to search for.
- The list of drafts will automatically filter.

Filter Event Drafts

You have the ability to filter your event drafts to show items created on a particular date, at a particular time, or within a certain window of time.

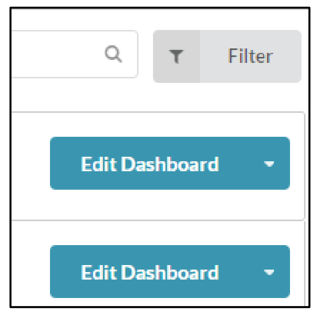
To filter your event drafts:



- Find the gray Filter button located at the top right-hand side of your screen in the Event Drafts page, beside the search bar.
- Click the Filter button and a dropdown menu will appear where you will see two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter event drafts from.
- Below these fields there is a calendar you can also use to choose the date that you would like to filter drafts from.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your drafts, which will close the dropdown menu.

Edit a Draft

To edit one of your event drafts:

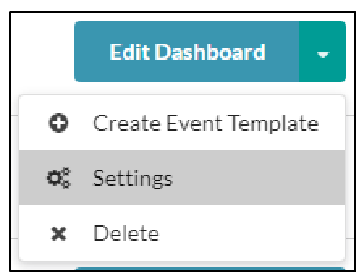


- Look to the right-hand side of your screen underneath the gray filter button where you will see blue Edit Dashboard buttons across from the each of the event drafts you have created.
- Clicking the Edit Dashboard button will direct you to the event dashboard for that particular event draft where you can make any changes desired.

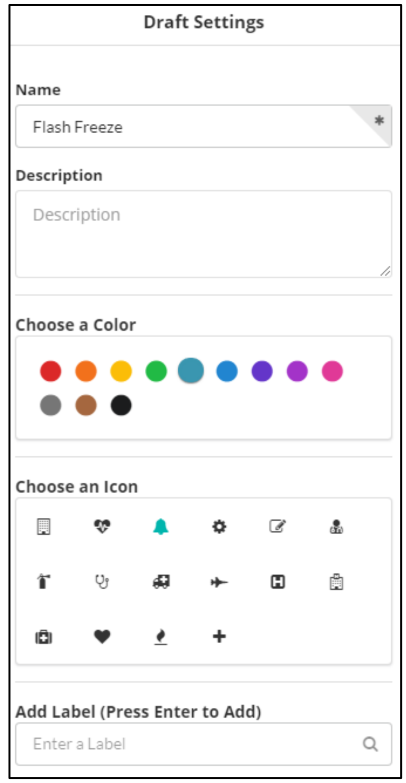
Edit Draft Settings

You are also able to change some settings for each of your event drafts to make them more distinct and easier to locate.

To edit the settings of your event drafts:



- Navigate to the right-hand side of your screen across from any of your event drafts where you will see a blue Edit Dashboard button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with three options.
- Choose the Settings option in this dropdown menu, and a sidebar will come out from the right-hand side of your screen.

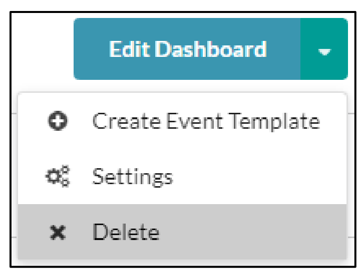


- There are five sections in this sidebar, the first one being a field where you can modify the name of the event draft. Type in the new name for the draft in the textbox provided if you would like to change the name of your event draft.
- The second field is where you can input a description for your event draft. Simply type a description into the textbox provided in this field. This is an optional field.
- The third section asks you to choose a color for the icon that appears to the left of your event draft name. Click on the color you would like to use for your icon.
- The section below the Choose a Color section is where you can select an image for your event icon. The default image that is used for all new event drafts is a "+" sign, but you can change the icon so it displays one of the images available in this section.
- The last field in the Settings sidebar is where you can add labels to your event drafts. Input a label for your draft into the field provided and press the Enter button on your keyboard. This will add the label to the section underneath the Label field in the sidebar, allowing you to add additional labels if you need to.

[**Note:** Labels are essentially tags that you can use to segment your drafts into groups and search for them more easily.]

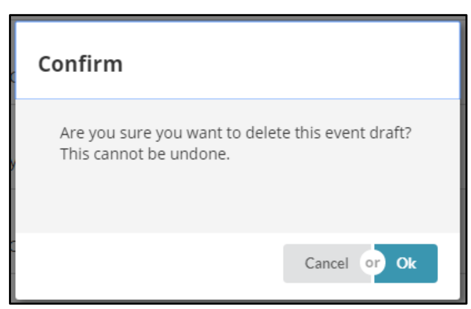
- When you are finished configuring your settings, click the blue Save button at the bottom of the sidebar to save your changes, or click the Cancel button to close the sidebar without saving any changes.

Delete an Event Draft



To delete an event draft:

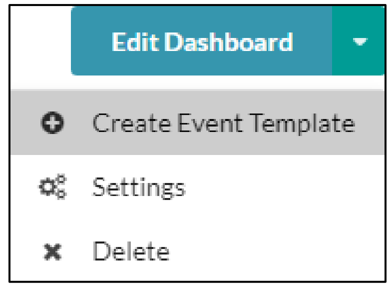
- Navigate to the right-hand side of your screen across from any of your event drafts where you will see a blue Edit Dashboard button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with three options.
- The third option in this dropdown lets you delete an event draft and all its configurations. Clicking the Delete option will cause a pop-up window to appear asking you to confirm the deletion of the draft.



- Click the blue OK button to delete the event draft or click Cancel to close the pop-up window without completing the deletion of the draft.

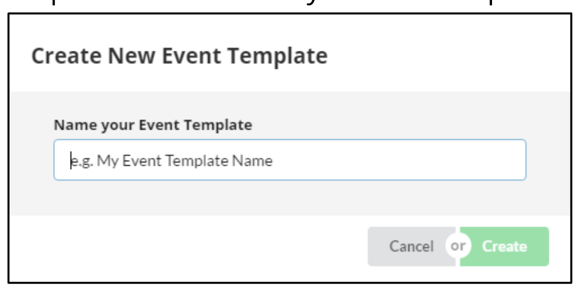
Create an Event Template

Event templates are used to launch active events from either the default or a custom dashboard. Drafts are essentially working copies of an event, that can be modified whenever needed. Templates are more or less finalized versions, or "snapshots" of these drafts.



To create a template out of an event draft:

- Navigate to the right-hand side of your screen across from any of your event drafts where you will see a blue Edit Dashboard button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will cause a dropdown menu to appear with three options.
- The first option in this dropdown lets you create an event template which will be able to be published to the Event Launcher widget on your Command Hub dashboard. Clicking this button will bring up a pop-up window asking you to provide a name for your new template.
- Enter the template name into the field provided and click the green Create button to be directed to the Event Templates page in the Event application or click Cancel to close the pop-up window without templating the draft.



Refer to the *Event Templates* section to learn more about Event Templates.

Event Draft Setup

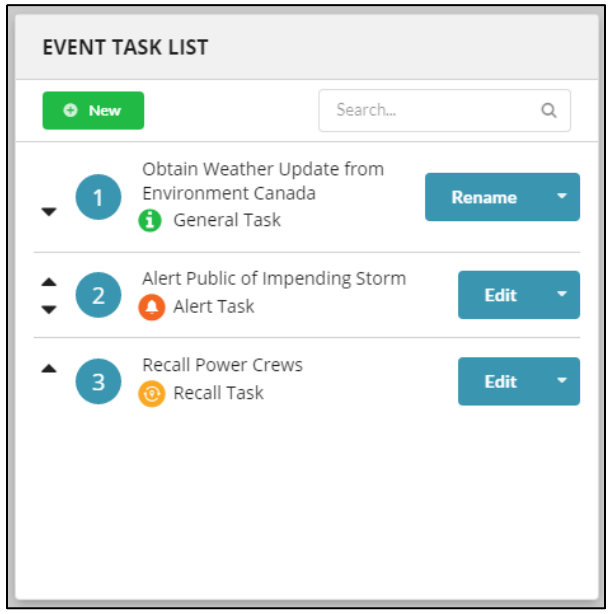
To create a new event draft, click on the green Create New Draft button located at the top of the Event Drafts page in the Event application. You will be directed to a dashboard for your new draft where you are able to configure the layout of the widgets and content that will be used during an active event of this nature. When you arrive on the dashboard for the new event draft, there are three widgets that are automatically placed on the dashboard:

- Event Overview
- Campaign Management
- Event Task List

Refer to the *Event Dashboard* section for more information about these widgets.

To begin designing your event draft layout:

Create a New Task

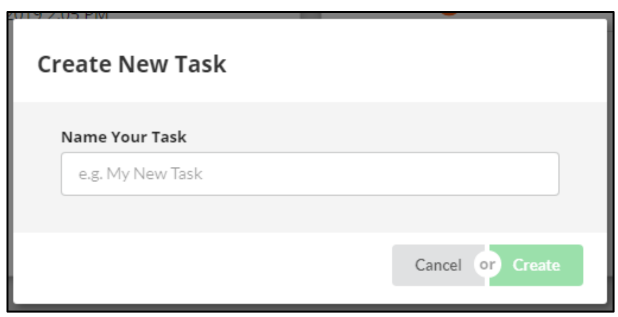


In the Event Task List widget, you will see a green New button. This is how you can begin creating the ordered task list that you will follow during an active event.

Click this button and a dropdown menu will appear with five options for tasks you can create:

- General Task
- Alert Task
- Live Survey Task
- Recall Task
- Teleconference Task

When you select a task from this dropdown menu a pop-up window will appear where you can name the new task. Once you have provided a name and clicked the green Create button, you will be directed into the setup process for that application where you can create a framework for the campaign's content. This content can be updated and completed each time the event is launched.

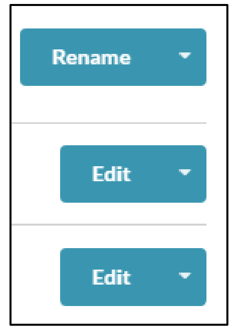


Refer to the respective channel's user guide to learn how to set up the communication tasks.

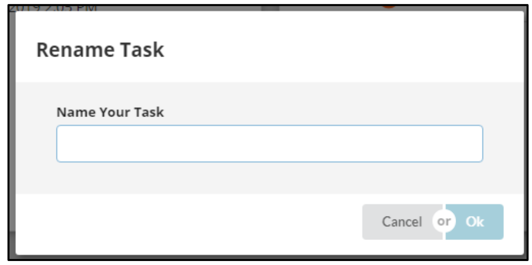
[**Note:** There is no setup process when creating a General Task. You will be asked to insert a task name into the pop-up window that appears, and when you click the green Create button the task will immediately be added to the Event Task List widget on the dashboard.]

[**Note:** When selecting the contacts for a new task, you will only be able to select contacts from lists, filters, map, and OnCall groups. You are not able to add individual or new contacts due to the fact that should you turn this draft into a template and one of these contacts is removed from your CRM, the template may not be updated and there's a chance that the template will not have any contacts to send to. By eliminating these two contact selection options, this helps ensure that there will always be contacts to receive the message.]

Edit/Rename a Task



When you have created a new task and it has been added to the Event Task List and/or the Campaign Management widgets on your dashboard, you are able to edit the content for the task by locating the blue Edit button to the right of the task name in either of these widgets. Clicking the Edit button will open up the setup process for the task.

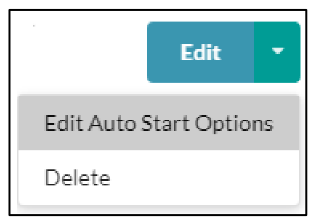


For general tasks, you are only able to rename them as there is no setup involved with this task type. To rename a general task, click on the blue Rename button located to the right of the current task name in the Event Task List widget. Enter the new name for your task into the pop-up window that appears and click the blue OK button to save your changes, or the Cancel button to close the pop-up without renaming your general task.

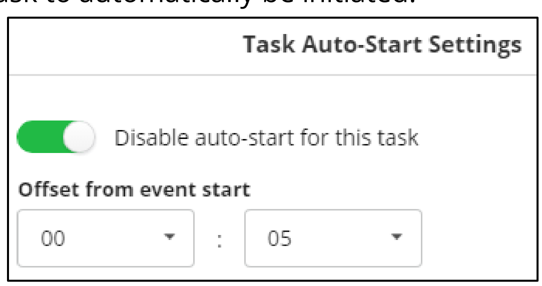
Enable Auto Start

When you have created a new task and it has been added to the Event Task list widget on your dashboard and is fully configured, you are able to enable an auto start functionality that will cause the task to automatically deploy a certain number of minutes after a new instance of this event is launched.

To do this:

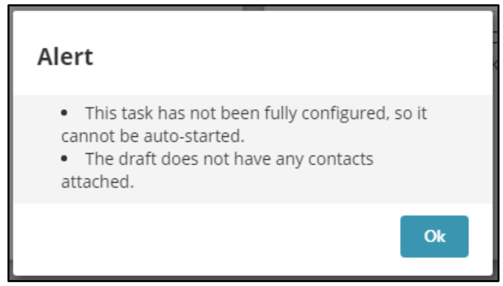


- Click the downward-facing arrow button attached to the blue Edit button located to the right of the current task name and select Edit Auto Start Options, which will bring up a sidebar from the right side of your screen.
- Click on the red toggle to enable the auto start option for this task. Once the toggle has turned green, a new field set will appear asking you to select the number of hours and minutes from the start of the event you wish this task to automatically be initiated.
- Choose the number of hours and/or minutes from the two sets of dropdown menus located in this field. The dropdown on the left refers to the number of hours and the one on the right refers to the number of minutes.



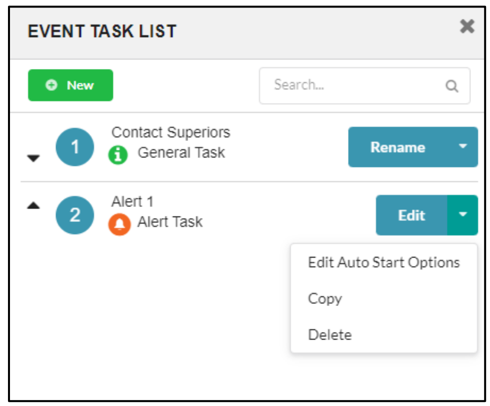
[**Note:** By leaving both dropdowns with the value of 00:00, this means that the task will be initiated immediately upon the launch of the event.]

- Click the blue Save Settings button at the bottom of the sidebar to save the auto start time or click the Cancel button to close the sidebar without saving your settings.



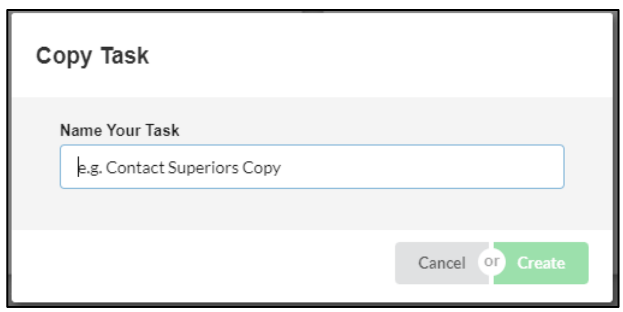
[**Note:** You can only enable the auto start functionality if the task has been completely configured. You will receive an error pop-up if the task has not been fully configured.]

Copy a Task



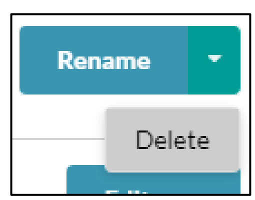
When you have created a new task and it has been added to the Event Task List widget on your dashboard, you are able to copy the task by:

- Clicking on the downward-facing arrow button attached to the blue Edit or Rename button located to the right of the current task name.
- Click the arrow button, and then select the Copy option that will bring up a pop-up window asking you to provide a new name for the copied task.
- Click the green Create button to copy the task and close the pop-up window or click the Cancel button to close the pop-up without copying the task.

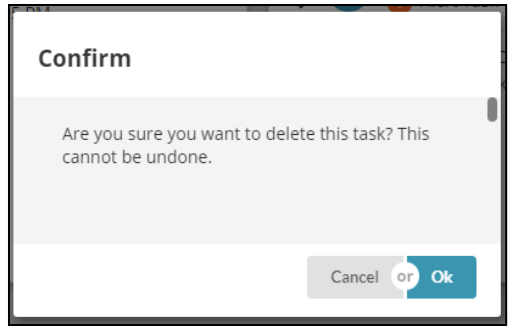


Delete a Task

When you have created a new task and it has been added to the Event Task List widget on your dashboard, you are able to delete the task by:



- Clicking on the downward-facing arrow button attached to the blue Edit or Rename button located to the right of the current task name.
- Click the arrow button, and then select the Delete option that will bring up a pop-up window asking you to confirm the deletion of the task.
- Click the blue OK button to delete the task and close the pop-up window or click the Cancel button to close the pop-up without deleting the task.

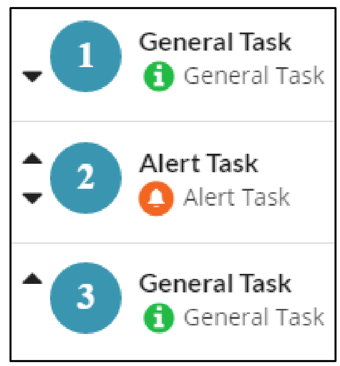


Re-order Tasks

When you have created multiple tasks and they are numbered in your Event Task List widget, you are able to re-order these tasks if you need to.

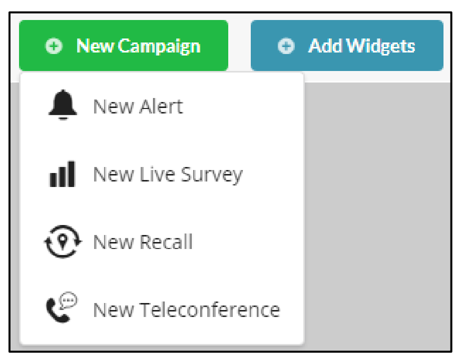
To re-order your tasks:

- Locate the black arrow buttons that appear to the left of the task number in the Event Task List widget.
- To move a task up one position in the list, click an upward-facing arrow, and to move a task down one position click a downward-facing arrow.
- Continue clicking the arrows for a specific task until it reaches the desired position in the task list. Tasks will automatically be re-numbered whenever their positions change.



Create a New Campaign

Rather than creating a new task that will appear in the Event Task List widget, you can create a new message that can be sent out at any time during an active event. This new campaign will only appear in the Campaign Management widget and not as part of the pre-determined order of tasks.



Navigate to the top right corner of your screen where you will see the green New Campaign button next to the blue Add Widgets button. Clicking this button will provide you a dropdown menu with the choice to create a new alert, live survey, recall, or teleconference.

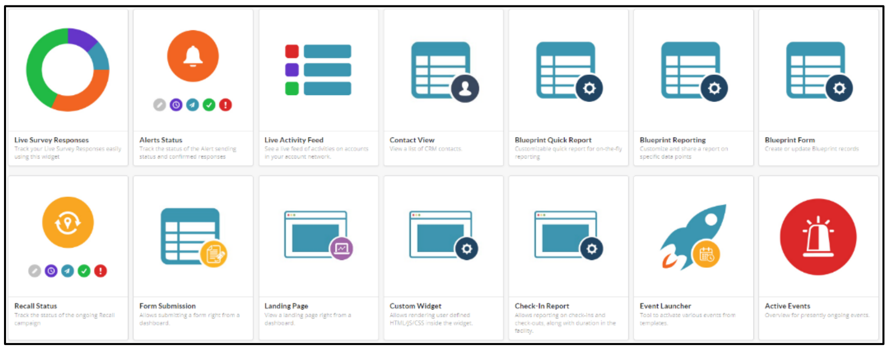
Refer to the respective user guides for these applications to learn more about the setup process for each of these campaign types.

Add Widgets

As with any dashboard, you can add widgets to display incoming information related to any created tasks or campaigns.

To add widgets to your event dashboard draft, navigate to the top right-hand corner of your screen where you will see a blue Add Widgets button next to the green New Campaign button. Clicking the Add Widgets button will bring up a page with the available widgets you can choose to add to your dashboard.

These are:



- Live Survey Responses
- Alerts Status
- Live Activity Feed
- Contact View
- Blueprint Quick Report
- Blueprint Reporting
- Blueprint Form
- Recall Status
- Form Submission
- Landing Page
- Custom Widget
- Check-In Report
- Event Launcher
- Active Events

For more information on adding these widgets and what information each displays, refer to the *Add Widgets* and *Monitoring Dashboard Widgets* sections.

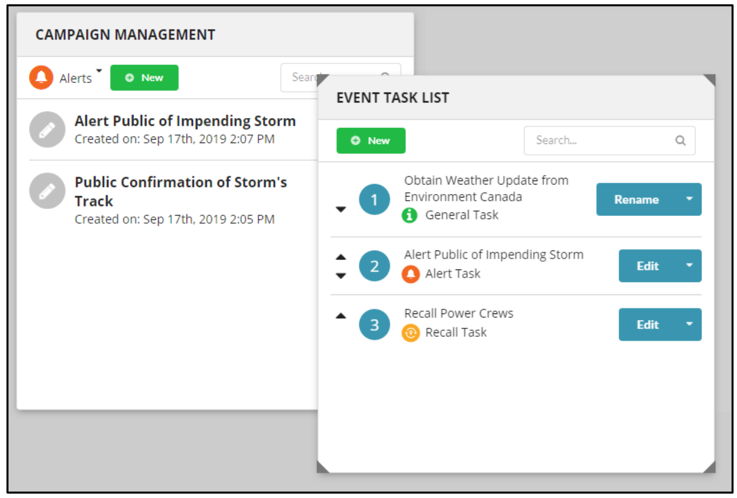
Customize Widget Placement

When designing the layout for your event dashboard draft you are able to arrange your widgets into whatever order you would like and modify the size of each widget on the dashboard.

To move a widget to another position on your dashboard:

- Hover your mouse over the title bar of the widget you would like to move. Your mouse will change to a four-way arrow, indicating that the widget can be dragged and dropped to a new location.

- Click and drag the widget to its new location on the dashboard. Other widgets will move out of the way as the one you are dragging moves over them.



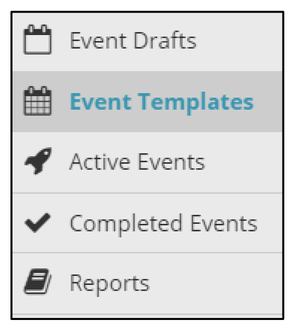
To modify the size of a widget:

- Hover your mouse over any of the widget's corners. Your cursor will change to a two-way arrow, indicating that the corner can be pulled out or pushed in to change the widget size.
- Click and drag the corner of the widget until it is the desired width and height.
- Other widgets will move out of the way as the widget's size expands or decreases.

Once you have finished designing your event draft, you must save the draft by clicking the blue Save Layout button that appears at the bottom right-hand side of your screen. This will take you back to the main Event Drafts page in the Event application where you will see your new draft event in the list of drafts.

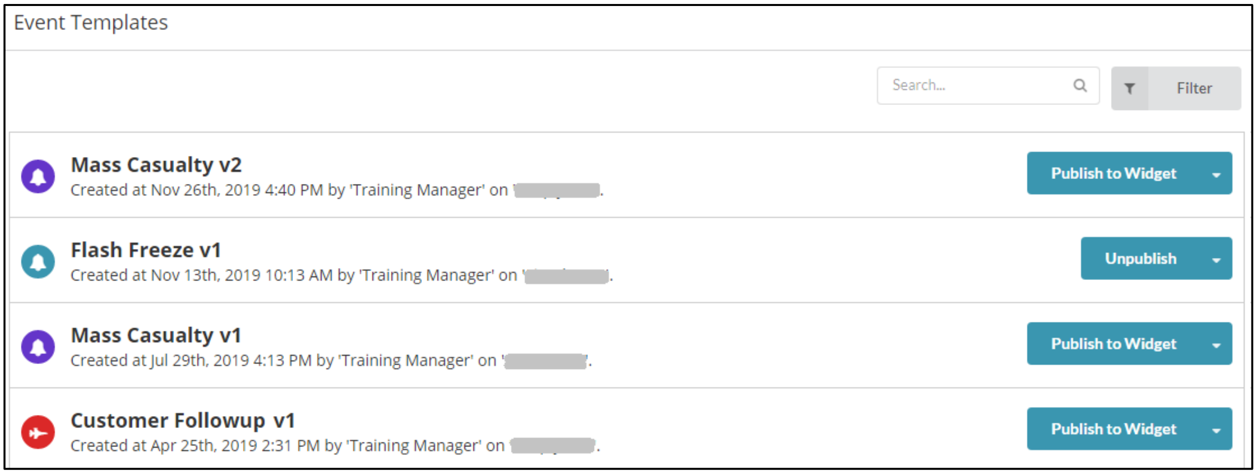
If you do not wish to save this new event draft, click the Cancel button located next to the Save Layout button in your event draft dashboard. You will be brought back to the main Event Drafts page without saving your current event draft.

Event Templates



The second tab in the menu on the left side of your screen in the Event module is Event Templates and this is the page where you will be able to see all the templates you have created from your event drafts. Creating event templates is the second step you must take before being able to launch a new templated event.

In the Events Templates tab, you are able to:



View the List of Templates

On the Event Templates page, you will see a list of all the event templates created from event drafts, with the most recent appearing at the top. If there are no templates listed, this means you have not yet created one (Refer to the *Create an Event Template* section for information on how to create a new template from an event draft).

For each template you will be able to see the following information:

- The name given to the event template
- The date and time the template was created
- The user who created the event template
- The account the creator belongs to
- Any descriptions or labels given to the event draft by the creator

Navigate Multiple Template Pages

Your event templates will appear in a list in the Event Templates page in the event module.

To navigate through the pages of templates:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of event templates you have created.
- Click either the page number you would like to visit to proceed to another page of templates or click the Next button, which will take you to the next page of templates. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.

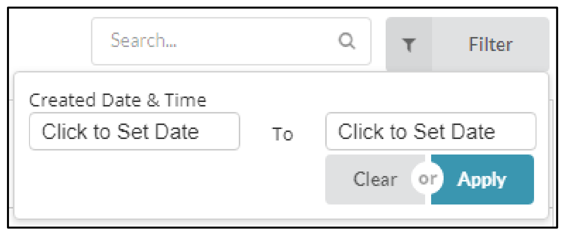
- You can also choose how many templates to display at a time by clicking on the "Showing…" link located to the right of the number of displayed templates.

Search for Event Templates

If you are looking for a particular event template, you can easily search through the templates in the list on the Event Templates page by:

- Selecting the search box that appears in the top right-hand corner of the page next to the gray Filter button.
- Typing in the text that you would like the system to search for.
- The list of templates will automatically filter to match the typed-in text.

Filter Event Templates



You have the ability to filter your event templates to show items created on a particular date, at a particular time, or within a certain window of time.

To filter your event templates:

- Find the gray Filter button that is located at the top righthand side of your screen in the Event Templates page, beside the search bar.
- Click the Filter button and a dropdown menu will appear where you will see two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter event templates from.
- Below these fields there is a calendar you can also use to choose the date that you would like to filter templates from.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your templates, which will close the dropdown menu.

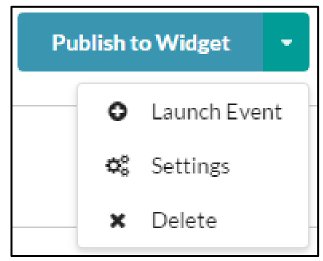
Publish/Unpublish Template to Event Launcher Widget

To publish/unpublish a template to the Event Launcher widget:

- Look to the right-hand side of your screen underneath the gray filter button where you will see either a blue Publish to Widget button or an Unpublish button across from each of the event templates you have created.
- Clicking the Publish to Widget button will cause the event template to become viewable on Event Launcher widgets located on users' various dashboards. Users are now able to launch a new active event from this template you have created.
- Clicking the Unpublish button will remove this template from all Event Launcher widgets, preventing it from being used to launch active events.

[**Note:** Unpublished event templates can still be launched from the Event application.]

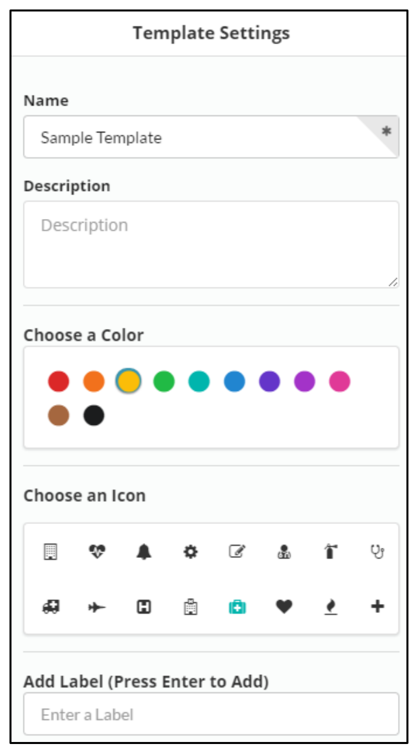
Edit Template Settings



You are also able to change some settings for each of your event templates to make them more distinct and easier to locate.

To edit the settings of your event templates:

- Navigate to the right-hand side of your screen across from any of your event templates where you will see a blue Publish/Unpublish to Widget button.
- On the right side of this button you will see a downward facing arrow. Clicking this arrow will make a dropdown menu appear with three options.
- Choose the Settings option in this dropdown menu, and a sidebar will come out from the right-hand side of your screen.
- There are five sections in this sidebar, the first one being a field where you can modify the name of the event template. Type in the new name for the template in the textbox provide if you would like to change the name of your event template.
- The second section is where you can input a description for your event template. Simply type a description into the textbox provided in this field.
- The third section asks you to choose a color for the icon that appears to the left of your event template name. Click on the color you would like to use for your icon.
- The section below the Color field is where you can select an image for your event icon. The default image that is used for all new event templates is the icon associated with the event draft, but you can change the icon so it pictures one of the images available in this field.
- The last section in the Settings sidebar is where you can add labels to your event templates. Input a label for your

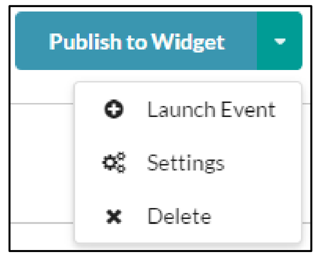


template into the field provided and press the Enter button on your keyboard. This will add the label to the section underneath the Label field in the sidebar, allowing you to add additional labels if you need to.

[**Note:** Labels are essentially tags you can use to segment your templates into groups and search for them more easily.]

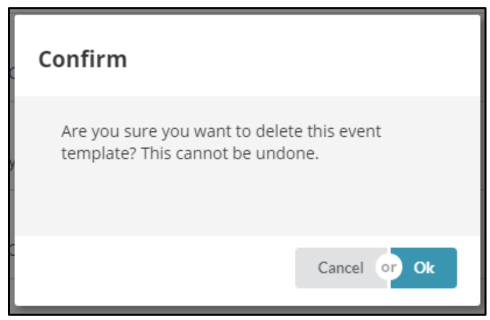
- When you are finished configuring your settings, click the blue Save button at the bottom of the sidebar to save your changes, or click the Cancel button to close the sidebar without saving any changes.

Delete an Event Template

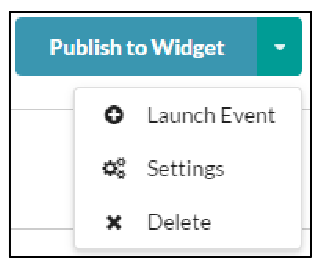


To delete an event template:

- Navigate to the right-hand side of your screen across from any of your event templates where you will see a blue Publish/Unpublish to Widget button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with three options.
- The third option in this dropdown lets you delete an event template and all its configuration. Clicking the Delete option will cause a pop-up window to appear asking you to confirm the deletion of the template.
- Click the blue OK button to delete the event template or click Cancel to close the pop-up window without deleting the template.

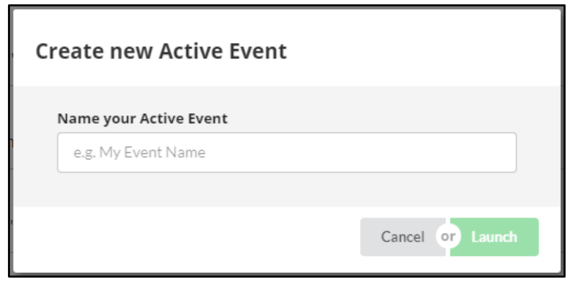


Launch an Event



To launch a template as a new active event:

- Navigate to the right-hand side of the screen across from any of your event templates where you will see a blue Publish/Unpublish to Widget button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with three options.



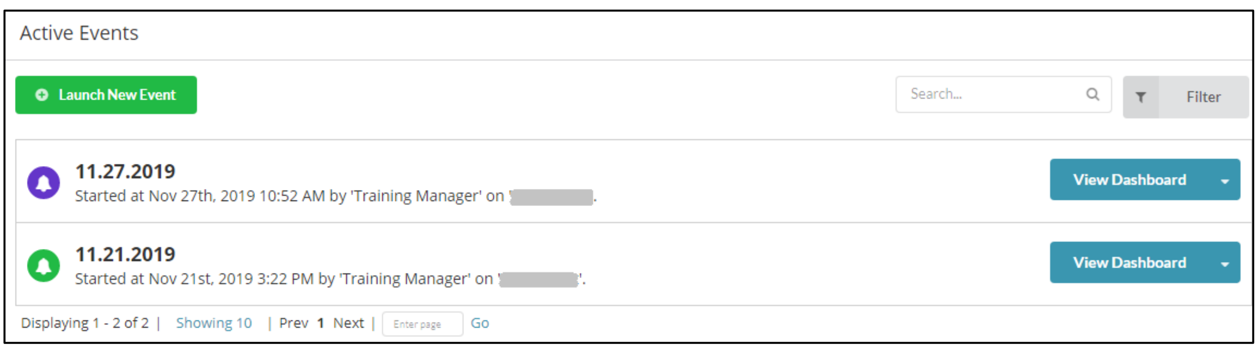
- The first of these options is Launch Event, which, when clicked, will open a pop-up window where you can provide a name for your new event. By default, the new event will have the same name as the event template but this can be modified, if desired. Enter a name in the field provided and click the green Launch button to begin a new active event using this template. After clicking Launch, you will be directed to the Event dashboard where you can monitor and manage the ongoing event.

[**Note:** You can also launch events via the Command Hub Event Launcher widget. Refer to the *Monitoring Dashboard Widgets* section for more information.]

Refer to the *Event Dashboard* and *Monitoring Dashboard Widgets* sections for how to manage your ongoing event from the Event Dashboard.

Active Events

The third tab in the menu on the left side of your screen in the Event application is Active Events and this is the page where you will be able to see all of the ongoing events that are being managed and monitored by users in your account network.



In the Active Events tab, you are able to:

View the List of Active Events

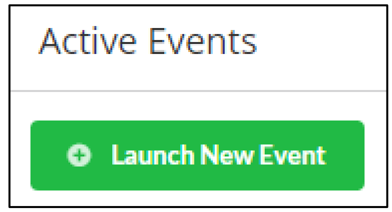
On the Active Events page, you will see a list of all of the events that are currently active in your account network, with the most recently launched appearing at the top. If there are no events listed, this means you have no active events in your network.

For each active event you will be able to see the following information:

- The name given to the event
- The date and time the event was launched
- The user who launched the event
- The account the launcher belongs to
- Any descriptions or labels given to the event by the launcher

Launch a New Event

If you wish to launch a brand-new active event that is not based on a previously created event template, there is a green Launch New Event button at the top of the Active Events tab on the left-hand side in the Event application.



Clicking this button will direct you to the naming page where you can name the new event before being directed to the event dashboard, where you can begin configuring widgets and campaigns.

Refer to the *Add Widgets* section for more information on how to add widgets to your event dashboard.

Navigate Multiple Event Pages

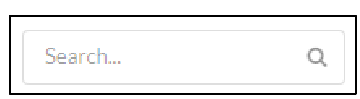
Your active events will appear in a list in the Active Events page in the event module.

To navigate through the pages of active events:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of events you have launched.
- Click either the page number you would like to visit to proceed to another page of events or click the Next button, which will take you to the next page of events. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.
- You can also choose how many active events to display at a time by clicking on the "Showing…" link located to the right of the number of displayed events.

Search for Active Events

To search for a particular active event:



- Select the search box that appears in the top right-hand corner of the page next to the gray Filter button.

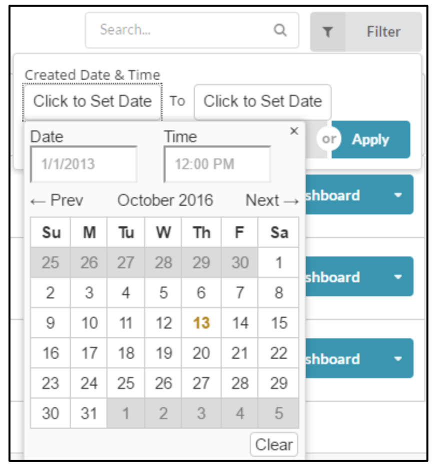
- Type in the text that you would like the system to search for.
- The list of active events will automatically filter.

Filter Active Events

You have the ability to filter your active events to show those launched on a particular date, at a particular time, or within a certain window of time.

To filter your active events:

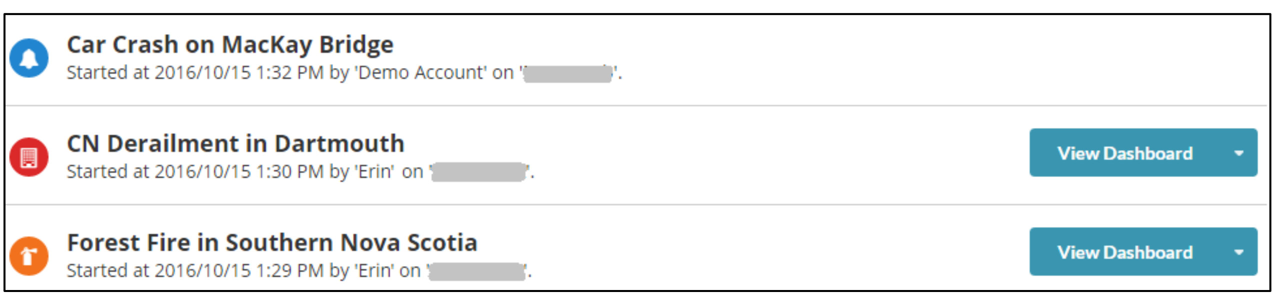
- Find the gray Filter button that is located at the top right-hand side of your screen in the Active Events page, beside the search bar.
- Click the Filter button and a dropdown menu will appear where you will see two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter events from.
- Below these fields there is a calendar you can also use to choose the date that you would like to filter events from.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your events, which will close the dropdown menu.



View Event Dashboard

To view the dashboard for an active event:

- Look to the right-hand side of your screen underneath the gray filter button where you may see a blue View Dashboard button across from the each of the active events.

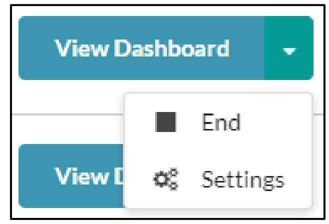


[**Note:** Depending on your level of permissions, you may not see a View Dashboard button next to certain events. These events were created by users in other accounts therefore you may not have access to view these events. Refer to the *SimplyCast Account Networks User Guide* for more information about permissions.]

- Clicking the blue View Dashboard button will direct you to the dashboard for that ongoing event where you can monitor and manage the event. Refer to the *Event Dashboards* section for more information regarding event dashboards.

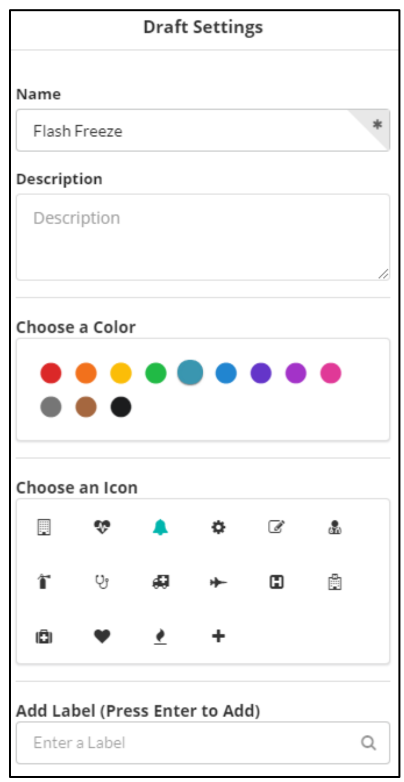
Edit Event Settings

You are also able to change some settings for each of your active events (if you have the permissions to do so) to make them more distinct.



To edit the settings of your events:

- Navigate to the right-hand side of your screen across from any of your active events where you may see a blue View Dashboard button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with two options.
- Choose the Settings option in this dropdown menu, and a sidebar will come out from the right-hand side of your screen.
- There are five fields in this sidebar, the first one being a field where you can modify the name of the event. Type in the new name for the event in the textbox provide if you would like to change the name of your active event.
- The second field is where you can input a description for your event. Simply type a description into the textbox provided in this field.
- The third field asks you to choose a color for the icon that appears to the left of your event name. Click on the color you would like to use for your icon.
- The field below the Choose a Color field is where you can select an image for your event icon. The default image that is used for all new events is the image associated with the template, but you can change the icon so it pictures one of the images available in this field.
- The last field in the Settings sidebar is where you can add labels to your active events. Input a label for your event into the field provided and press the Enter button on your keyboard. This will add the label to the section underneath the Label field in the sidebar, allowing you to add additional labels if you need to.

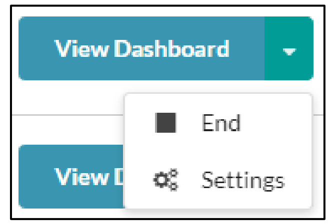


[**Note:** Labels are essentially tags that you can use to segment your templates into groups and search for them more easily.]

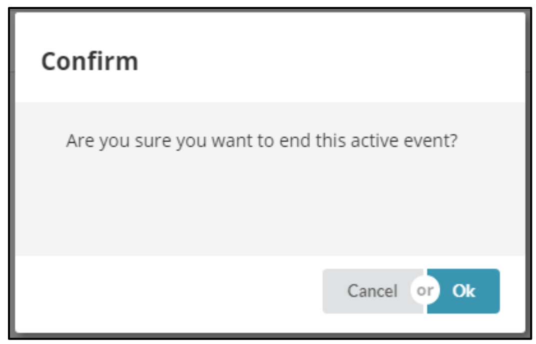
- When you are finished configuring your settings, click the blue Save button at the bottom of the sidebar to save your changes, or click the Cancel button to close the sidebar without saving any changes.

End an Active Event

To end an active event (if you have the permissions to do so):



- Navigate to the right-hand side of your screen across from any of your event templates where you may see a blue View Dashboard button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with two options.
- The first option in this dropdown lets you end the event and have it marked as complete in the report Clicking the End option will cause a pop-up window to appear asking you to confirm you would like to end the active event.
- Click the blue OK button to end the event or click Cancel to close the pop-up window without ending the event.



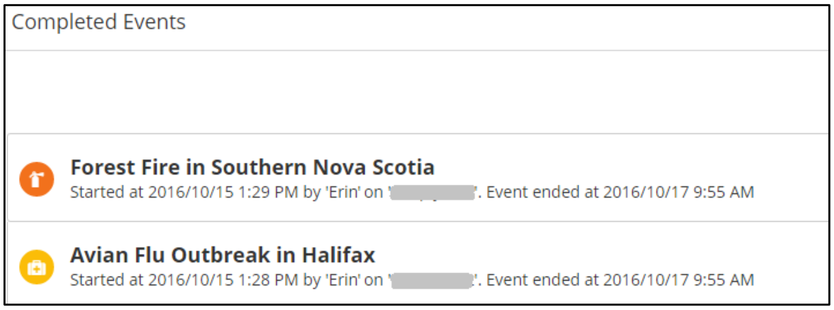
Completed Events

The fourth tab in the menu on the left side of your screen in the Event module is Completed Events and this is the page where you will be able to see all of the events that have been ended by users in your account network.

In the Completed Events tab, you are able to:

View the List of Completed Events

On the Completed Events page, you will see a list of all of the events that have been ended by users in your account network, with the most recently completed appearing at the top. If there are no events listed, this means you have no completed events in your network.



For each completed event you will be able to see the following information:

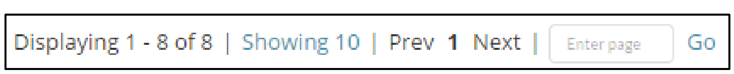
- The name given to the event
- The date and time the event was launched
- The user who launched the event
- The account network the launcher belongs to
- The date and time the event was ended
- Any descriptions or labels given to the event by the launcher

Navigate Multiple Pages of Completed Events

Your completed events will appear in a list in the Completed Events page in the event module.

To navigate through the pages of completed events:

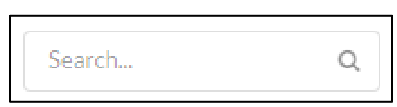
- Look to the bottom of your screen where you will find the page numbers indicating the total number of events you have ended.
- Click either the page number you would like to visit to proceed to another page of events or click the Next button, which will take you to the next page of events. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.
- You can also choose how many completed events to display at a time by clicking on the "Showing..." link located to the right of the number of displayed events.



Search for Completed Events

To search for a particular event that has been ended:

- Select the search box that appears in the top right-hand corner of the page next to the gray Filter button.
- Type in the text that you would like the system to search for.

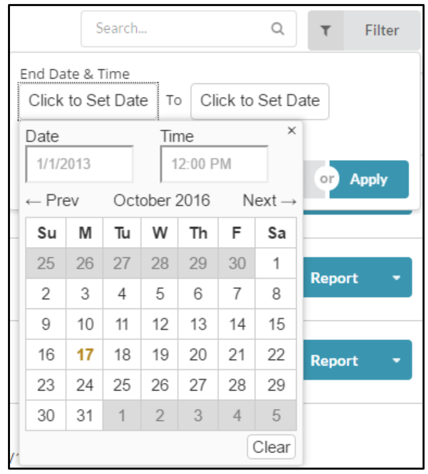


- The list of completed events will automatically filter.

Filter Completed Events

You can filter your completed events to show those launched on a particular date, at a particular time, or within a certain window of time.

To filter your completed events:



- Find the gray Filter button that is located at the top right-hand side of your screen in the Completed Events page, beside the search bar.
- Click the Filter button and a dropdown menu will appear where you will see two boxes that say Click to Set Date.
- Click either box and another dropdown menu will show up with two fields labeled Date and Time in which you can manually insert the date and time you would like to filter events from.
- Below these fields there is a calendar you can also use to choose the date that you would like to filter events from.
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your events, which will close the dropdown menu.

View the Event Report

To view the report for a completed event:

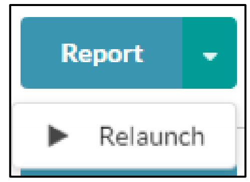
- Look to the right-hand side of your screen underneath the gray filter button where you may see a blue Report button across from the each of the active events.

[**Note:** Depending on your level of permissions, you may not see a Report button next to certain events. Some of these events will have been created by users in other accounts on your network, therefore you may not have access to view these reports. Refer to the *SimplyCast Account Networks User Guide* for more information about permissions.]

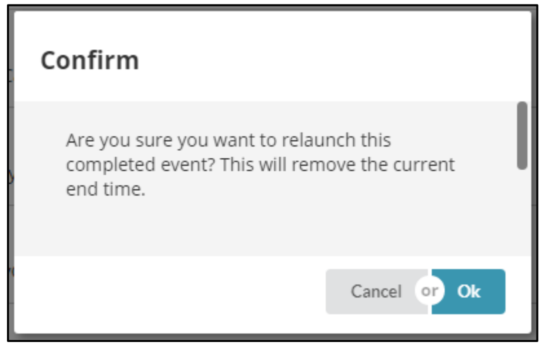
- Clicking the Report button will direct you to the report for that ongoing event where you can view the information regarding the completed event. Refer to the *Reports* section for more information regarding event reports.

Relaunch an Event

To relaunch an ended event (if you have the permissions to do so):

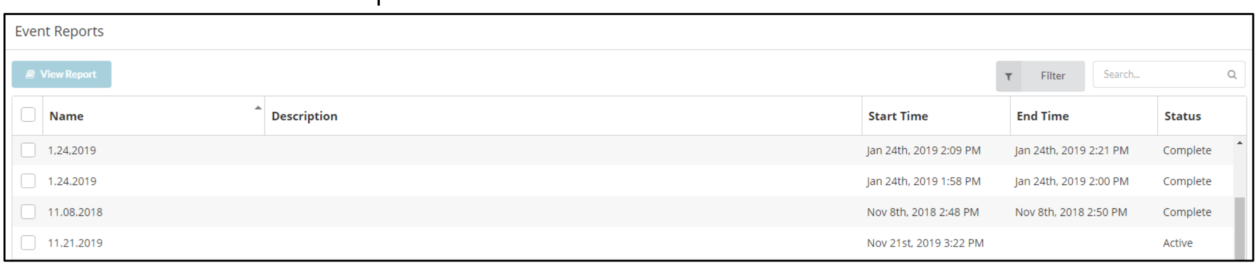


- Navigate to the right-hand side of your screen across from any of your event templates where you may see a blue View Dashboard button.
- On the right side of this button you will see a downward-facing arrow. Clicking this arrow will make a dropdown menu appear with the option to relaunch the event.
- Clicking the Relaunch option will cause a pop-up window to appear asking you to confirm you would like to relaunch the completed event, saying that it will remove the currently displayed end time.
- Click the blue OK button to relaunch the event or click Cancel to close the pop-up window without launching the event again.



Reports

To navigate to the main Event Reporting interface, locate the Reports tab located on the left side of your screen, the last of five tabs in the menu. Clicking this tab will direct you to the main reporting page for the Event module. Here you are able to see all the reports for events you have either created or have permission to view.



Once on the main Event reporting page, you are able to:

View the List of Event Reports

On the main Event Reporting page, you will see a list of all of the events that have been ended by users in your account network, with the most recently completed event appearing at the top of the list. If there are no events listed, this means that there are no reports available to view.

For each completed event you will be able to see five columns of information:

- **Name**: The name given to the event
- **Description**: Any descriptive information provided for the event
- **Start Time**: The date and time the event was launched

- **End Time**: The date and time the event was ended (if available)
- **Status**: The current state of the event

Navigate Multiple Pages of Reports

To navigate through the pages of Event reports:

- Look to the bottom of your screen in the Reporting interface where you will find the page numbers indicating the total number of event reports.
- Click either the page number you would like to visit to proceed to another page of events or click the Next button, which will take you to the next page of event reports. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.
- You can also choose how many reports to display at a time by clicking on the "Showing…" link located to the right of the number of displayed event reports.

Search for Event Reports

To search for a particular event report:

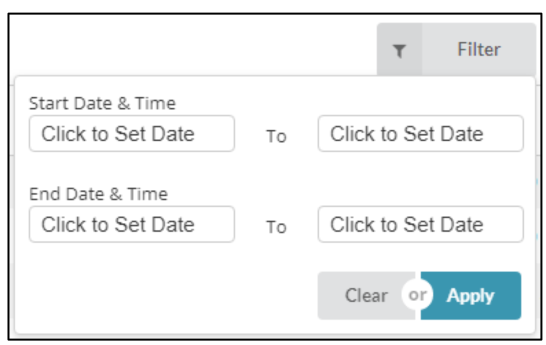
- Select the search box that appears in the top right-hand corner of the page next to the gray Filter button.
- Type in the text that you would like the system to search for.
- The list of event reports will automatically filter.

Filter/Sort Event Reports

You can filter your event reports to show reports from a particular date, at a particular time, or within a certain window of time.

To filter your reports using the filter button:

- Find the gray Filter button located at the top right-hand side of your screen in the Reporting page, directly above the list of reports beside the search bar.
- Click the Filter button and a dropdown menu will appear in which you will see two sets of boxes that say Click to Set Date, one for filtering event reports by start date and the other, by end date.



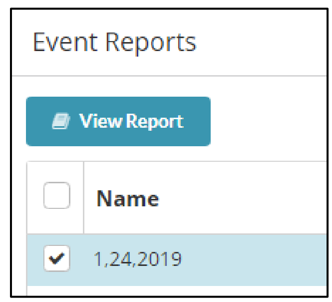
- Click any box and another dropdown menu will show up with two fields labeled Date and Time where you can manually insert the date and time you would like to filter event reports from.
- Below these fields there is a calendar you can also use to choose the date that you would like to filter events from
- Click Apply to implement the filter. Or, click Clear if you do not wish to filter your reports, which will close the dropdown menu.

To sort your reports using the table columns:

- Each report is organized into a table with five information columns. Click the name of either the Name, Start Date, or End Date columns to sort the report according to that column.

[**Note:** Reports are sorted by end date as a default, with the most recently ended event at the top of the list.]

View the Event Report

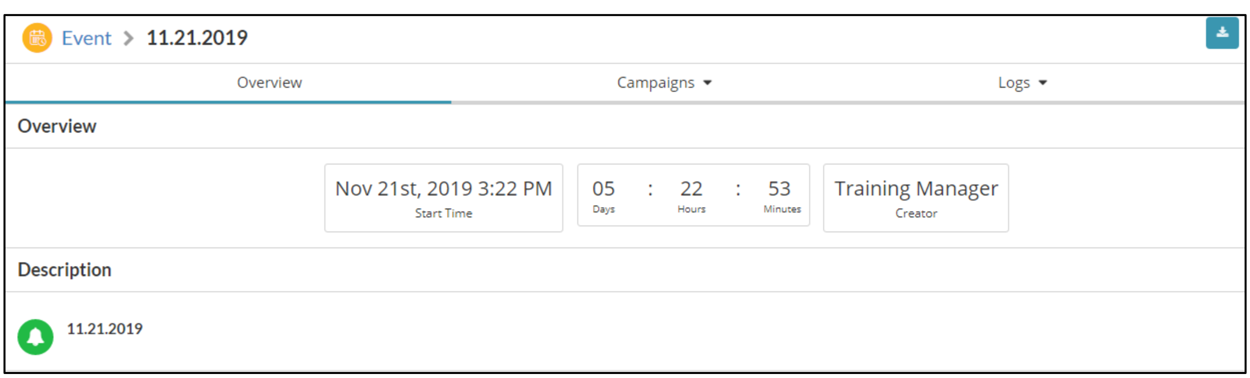


To view the report of an individual event:

- Look to the left-hand side of any of the reports in the list and you will see a checkbox. Clicking the checkbox will activate the blue View Report button located at the top of the list of reports
- Click the blue View Report button and you will be directed to the individual report for that event.

Report Overview

There are three tabs visible at the top of your event report. The first tab located on the left is the Overview tab.



At the top of this section you will see an overview containing four boxes of information:

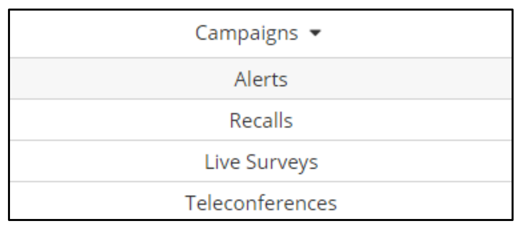
- **Start Time:** This box indicates the date and time that the event was launched.
- **End Time:** This box indicates the date and time the event was ended (if the event is not currently active).
- **Total Event Length:** This box displays the entire length of the event in terms of days, hours, and minutes.
- **Creator:** This box displays the name of the account user who launched the event.

The second section in the Overview tab of your event report is where you will find the description of the event, including the event name and icon. If you chose to include a longer text description for your event, you will also see it in this section.

Depending on whether any tags or labels were added to the event, you will see sections in the Overview tab dedicated to each of these items as well.

Campaigns

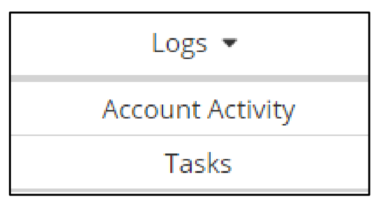
The second tab at the top of your event report is the Campaigns tab. When you click on this option, a dropdown will appear with options for Alerts, Recalls, Live Surveys, and Teleconferences. Choose any of these options to be directed to a page with a list of all the tasks you created for this application in your event template.



Refer to the *Reports* section of the corresponding user guides for more information regarding the reports for these applications.

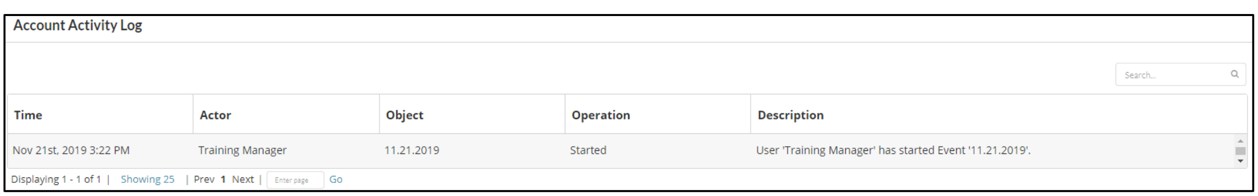
Logs

The third tab located at the top of your event report is the Logs tab. When you click this tab a dropdown menu will appear with two options: Account Activity and Tasks.



Account Activity Log

In the Account Activity tab you will see a table displaying all the actions that have occurred during the course of this event.



Account Activity Log

Search...

Time	Actor	Object	Operation	Description
Nov 21st, 2019 3:22 PM	Training Manager	11.21.2019	Started	User 'Training Manager' has started Event '11.21.2019'.

Displaying 1 - 1 of 1 | Showing 25 | Prev 1 Next | Enter page Go

There are five columns of information in the Account Activity Log:

- **Time:** This column refers to the time the action was taken.
- **Actor:** This column refers to the user or system who performed the action.
- **Object:** This column refers to the name of the task or event that was affected by the action.
- **Operation:** This column refers to the action that was taken.
- **Description:** This column refers to the description for the action that was taken, and by whom.

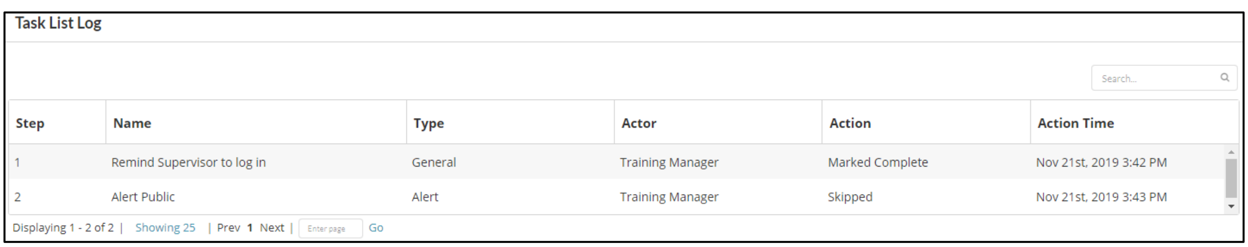
You can search for a specific item in this table by typing your text into the search bar located on the top right corner of the table. The results will automatically filter.

To navigate multiple pages of activity, look to the bottom of the Activity table where you will find the page numbers indicating the total number of actions. Click either the page number you would like to visit to proceed to another page of actions or click the Next button, which will take you to the next page of actions. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.

You can also choose how many actions to display at a time by clicking on the "Showing..." link located to the right of the number of displayed actions.

Task List Log

In the Tasks option in the Logs dropdown, you are able to see information pertaining to the various tasks that are part of the event template.


Task List Log

Step	Name	Type	Actor	Action	Action Time
1	Remind Supervisor to log in	General	Training Manager	Marked Complete	Nov 21st, 2019 3:42 PM
2	Alert Public	Alert	Training Manager	Skipped	Nov 21st, 2019 3:43 PM

There are six columns of information available in the Task List Log:

- **Step:** This column refers to the number the task was listed at in the event template order.
- **Name:** This box refers to the title that was given to the task by the creator.
- **Type:** This box refers to the SimplyCast application that the task was created for, or if it was a general task.
- **Actor:** This box refers to the user or system who performed an action related to the task.
- **Action:** This box refers to the action that was performed related to the task.
- **Action Time:** This box displays the date and time the task action was performed

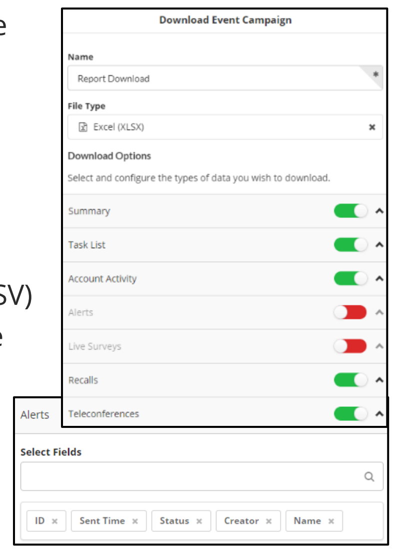
You are able to search for a specific task step in this table by typing your text into the search bar located on the top right corner of the table. The results will automatically filter to match the typed-in text.

To navigate multiple pages of activity, look to the bottom of the Task List Log table where you will find the page numbers indicating the total number of tasks. Click either the page number you would like to visit to proceed to another page of tasks or click the Next button, which will take you to the next page of tasks. Or, enter the page number in the field located to the right of the Next button, and click Go to proceed directly to that page.

You can also choose how many tasks to display at a time by clicking on the “Showing...” link located to the right of the number of displayed tasks.

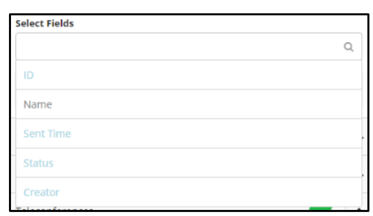
Download the Event Report

To download the entire Event report to your device, there is a blue download button that is located at the top right of the report.



When you click the download button:

- A sidebar will come out from the right-hand side of your screen.In the first field, you can provide a name the report.
- Next, you can choose to download the report in either Text (CSV) or Excel (XLSX) format by clicking the appropriate option in the dropdown menu.
- You are then able to select the download options, selecting which types of data you wish to download.
- Clicking on a section of will expand the associated drawer, giving you a list of columns which you can then remove by clicking the “X” button next to them. You can add back removed fields from the Select Fields search bar, which will expand to show the available fields.
- Selecting the toggle next to a section and switching them from green to red will remove that entire section of data from the report.
- Select the Download button and you will then be directed to a page with all your requested downloads showing the report's name, status, file type, and date it was created.
- Select the event report from this table and click the Download button to complete the download process.
- The page will continue to refresh until the requested download is complete.



Frequently Asked Questions (FAQs)

Are event templates available to everyone? Can they be shared to other users?

If you are part of the same account network with the correct permissions, you can decide who has the ability to see and modify your event templates.

Can you modify the contacts and content of an event task after launch?

Yes, you will have to enter the specific task setup process and ensure all the content is to your liking before deploying. In the edit mode, you are able to make the content more specific to the ongoing event as well as add and delete any contacts.

On a per event basis, can you see a log of all the tasks that occurred and when?

Yes. You can see a task log in the Event Reports interface.

What screen allows you to view all active events?

By proceeding to the Event application and selecting Active Events from the menu on the left side of the screen, you can view a list of all the active events going on in your account network.

Are the terms "task" and "event" interchangeable?

No, an event is the over-arching incident taking place, whereas a task is a specific action that takes place within an event. You can have multiple tasks within an event.

Do you have to create a draft in the Event application?

Yes, in order to create an event draft, you have to go into the Event application and create it there. If you launch a new event from the dashboard, this will be a one-off event that will be unable to be templated for future use.

Are an alert and alert task two different things?

Yes. An alert is a standalone mass notification, whereas an alert task is an alert that is associated with a specific event template.