



USER'S MANUAL

IRIS – Immediate Response Information System

TechRadium, Inc.

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Revision Sheet

Release No.	Date	Revision Description
Rev. 0	10/10/07	User's Manual Template and Checklist
Rev. 1	10/11/07	User's Manual for IRIS version 7.0
Rev. 2	2/5/08	Updates and revisions
Rev. 3	5/15/08	Version 7.2 updates with reporting re-design
Rev. 4	2/25/09	Version 7.3 updates with survey merge
Rev. 5	12/2/09	GIS additional filter update
Rev. 6	2/18/14	Updated contact information and miscellaneous interface changes.
Rev. 7	10/23/14	Updated GIS filter section
Rev. 8	5/26/20	Added incident management, additional reports and miscellaneous.

USER'S MANUAL

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1.0 GENERAL INFORMATION

1.0 GENERAL INFORMATION

1.1 System Overview

IRIS, the Immediate Response Information System, is a system for broadcasting alerts to multiple communication devices simultaneously via a secure web-based administrator interface, designed and developed by TechRadium, Inc. Alerts are delivered according to organization and/or individual user preferences including multilingual translations. IRIS has multiple options for message creation including text-to-speech, a method for recording voice and saved alerts. Two other key components of the system are the user data management module and the system reporting module.

1.2 Copyright and Patent Protection Notice

Copyright © 2020 by TechRadium, Inc. The IRIS product is protected by U.S. Patents 7,130,389; 7,174,005; 7,362,852; 7,418,085; 7,496,183; 7,519,165; 7,624,171; 7,684,548; 7,685,245; 7,773,729; and 8,165,274. Patents Pending.

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1.3 Authorized Use Permission

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In particular, without limiting the foregoing, you agree not to engage in, participate in, or knowingly permit any disassembly, decompilation, or other reverse engineering of any part of the Software or the functions or operation thereof.

You agree to comply with all applicable laws regarding use of the Software.

1.4 Points of Contact

1.4.1 Information

For information about IRIS or questions about your organization's set up and account, please contact your account executive or send an email to sales@useiris.com or call the toll-free number 1-866-894-5474. Visit the www.useiris.com website for more information.

1.4.2 Technical Support

For assistance in using the system or if any unforeseen problems arise, contact a technical support specialist by either sending an email to support@useiris.com or calling the toll-free number 1-866-894-5474.

1.4.3 Emergency After Hours Support

Available 24 hours a day, our emergency support staff will be able to help with sending alert notifications as well as other problems that need immediate attention by calling the toll-free number 1-866-905-IRIS (4747) and will require a PIN (personal identification number) to be given to the emergency support specialist.

2.0 SYSTEM SUMMARY

2.0 SYSTEM SUMMARY

2.1 System Configuration

IRIS can be accessed via any web-browser on a computer connected to the Internet. There is no hardware or software to install. The system is primarily configured with the user and group data provided when first implemented.



2.2 Data Flows

Initial and concurrent data uploaded is stored in a database adjacent or remote to the system. User data can be modified via the web-based administrator interface. Saved alerts are also stored within the database as well as all reporting information. User data is used to broadcast each alert and all responses to each alert is stored in the database for current and future reporting.

2.3 User Access Levels

User access levels primarily depend on the user and the type of organization the user belongs to. Any user with administrative rights will be able to modify user data for the groups that he/she have been assigned to administer. He/she will also be able to send alerts to users in only those groups. Depending on the type of organization, users without administrative rights may or may not be able to edit their individual data only. These users will not have access to the sending of an alert or any report features as well as any other user information belonging to another user.

2.4 Contingencies and Alternate Modes of Operation

If an administrator of the system (a user with administrative rights) does not have access to a computer with a web-browser or the computer does not have Internet access, then the administrator can contact a customer support specialist to perform the needed operations for him/her. In the event that an organization sends out more than one alert at the same time, then the alert with highest priority will take precedence. If both alerts have the same priority, then the alert that made it into the queue first will take precedence. Depending on the maximum queue limits, the number of total recipients, and the message size, both alerts could possibly broadcast simultaneously.

3.0 GETTING STARTED

3.0 GETTING STARTED

3.1 Signing On

To sign in to the system, users will need to go to <https://www.irisdispatch.com> and enter their username and password in the respective fields, then click on the **Sign In** button.



The image shows a sign-in form for IRIS 7.3 Administration. It features a title, two input fields for Username and Password, a SIGN IN button with a right-pointing arrow, a link for forgotten credentials, and a support contact number.

IRIS 7.3 Administration

Username:

Password:

SIGN IN ➔

Forgot your username/password? [Click Here](#)

If you do not have your username and/or password, please call customer support at 1-800-716-6521.

3.2 System Menu

The menu for an administrator, once signed in, will appear on the top, while the bulk of the page will contain the steps for broadcasting an alert. The administrator interface can be navigated by clicking on any of the links in this menu. Listed below are the names and description of each menu item. Some menu options may not be available depending on what features are available and the rights of the administrator.



For users without administrative rights, the only menu item will be a link to Sign Out of the system.

3.2.1 Home Page

This is the first page an administrator sees after successfully signing onto the system.

Current activity is the first thing listed on this page. This shows any alerts that are in progress for the organization as well as other alert information. Any noteworthy system updates are listed below the activity details.

Welcome to IRIS

Need assistance? Call Toll-Free:

1.866.905.4747 

Activity Details

Signed In As	Smith, Joe
Scheduled Alerts	0
Last Alert	<u>Thursday, March 10, 2016 3:17 PM</u>
Total Alerts Sent	14
Last Data Update	December 16, 2015
Current Users	29 / 1000

IRIS News and System Updates

No current news or updates.

Options

-  [Download User's Manual](#)
-  [Upload a User Data File](#)
-  [Opt-in / Opt-out For Updates Via E-mail](#)



Comments / Feedback

If you have any suggestions that will help us make IRIS better for you, please fill out the box below and click the submit button.

SUBMIT 

There is a link to upload new user data files in the Options box. This page will list all uploaded data files to date as well as provide a form for uploading data files containing new users and updated information on current users. These data files are processed by our technical staff once uploaded. Common file formats include .csv, .txt and .xls (comma delimited, tab delimited and Excel).

Another link in the Options box is the Opt-in/Opt-out for Updates. This allows the administrator to determine whether to receive and system updates or news via email.

Below the options is a form for user feedback. All feedback generated by administrators will be carefully considered for future upgrades and features. If there is a problem or error with the system, please contact a technical service specialist. Refer to section 1.4.2.

Also available as sub-menu options in the Home tab are a direct link to the administrator's user profile and a Help / Tutorials section. This page lists video tutorials that walk through certain features of the system.

3.2.2 Alerts

This tab will take the administrator to the 1st step for broadcasting an alert and allows the administrator to select between different alert options. Sub-menu options include accessing saved alerts and alert categories.

3.2.3 Incidents

If available, this tab allows the administrator to group alerts and other information into incidents for reporting purposes as well as to present timely, quickly changing information on a web page for necessary users.

3.2.4 Users

This tab allows the administrator to access functions that include searching for users, modifying user information and adding new users. User groups are also managed in a sub-menu option under this tab.

3.2.5 Surveys

If available, the tab allows an administrator to create and manage surveys that can be broadcasted to selected recipients. Results of surveys are listed under the Reports tab.

3.2.6 Reports

This tab allows the administrator to retrieve information on all alerts sent as well as their receipt status. If surveys are available, then those reports are also accessible through this tab.

3.2.7 Sign Out

A function that allows the user to sign out of the system and ending the session which will deny all future access until the user successfully signs in again.

3.3 Changing Username and Password

An administrator can change any username/password for any user he/she has administrative rights for including themselves. This can be done by looking up the user in the **Administer Users** section and changing the username/password information using the modify user form. If a selected username already exists in the system, the administrator will be prompted to enter a new unique username.

3.4 Exit the System


To properly exit the system, the user must click on the **Sign Out** link in the menu. This will ensure that the session is completely closed. Closing the browser does not always close out the session, thus allowing for an unauthorized user to gain access to the user account.

4.0 BROADCASTING ALERTS

4.0 BROADCASTING ALERTS

4.1 Step 1 – Select Message Type

This page allows the administrator to select from three different options on sending a message as well as describe how each alert degree color notifies users by devices listed.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
 <p>TEXT TO SPEECH ALERT</p> <p>CLICK HERE >>></p>				<p>SEVERE</p> <p>Phone 1 (Work) Phone 3 (Cell) Phone 2 SMS Email</p>
 <p>VOICE RECORDED ALERT</p> <p>CLICK HERE >>></p>				<p>HIGH</p> <p>Phone 1 (Work) Phone 3 (Cell)</p>
 <p>SAVED ALERT</p> <p>CLICK HERE >>></p>				<p>ELEVATED</p> <p>Phone 1 (Work)</p>
				<p>GUARDED</p> <p>Phone 3 (Cell)</p>
				<p>LOW</p> <p>Email</p>

4.2 Step 2 - Compose Text to Speech Alert

By clicking on the Text To Speech button from Step 1, a compose alert form will load for the administrator to complete.

4.2.1 Alert Degree

This allows the administrator to color-code the alert based on priority of the message. Each color can be adapted to an organization's notification policy. For example, red alerts can be emergency notifications while green alerts can be general information notifications.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
--------------------------------	----------------------------	----------------------------	-------------------------------	----------------------

Alert Degree:

Category:

Subject:

Message: [Listen Now!](#)

Message Preview:

The last preview created is listed above. If any changes are made to the text, click on the Listen Now link again to hear the changes.

Pager / Text Message:
(Optional)

Caller ID: 305 Characters Remaining for Pager / Text Message

4.2.2 Category

This allows the administrator to assign a category to each alert they send out. Alerts can also be grouped together on the reporting page. Refer to section 4.8 for information on managing these categories.

4.2.3 Subject

The subject field specifies a subject line for email and text messaging. This field also is used as the title of the alert in the reports.

4.2.4 Message

The message the administrator wants to broadcast is typed in here. This message will be translated to the proper languages as well as converted to speech for broadcasts to phones. A Listen Now! link allows for the administrator to preview the audio that will play for phone calls when the message is converted from text to speech. If other languages are available, those translations and audios can be previewed as well by selecting the desired language from the dropdown menu and clicking the Translate button.

4.2.5 Pager / Text Message

Most alphanumeric pagers and text message devices can only receive a maximum number of characters per message. This field allows the administrator to provide a summarized version of the message for those devices.

4.2.6 Caller ID

This field is optional. If an organization has users that have numeric pagers, then this will be the number transmitted to those devices. In some cases this number will also be the caller ID for broadcasts to phones with the caller ID feature. If a number is not specified in this field or for the organization, then the default call-in phone number will be used and if dialed by a user, the system will playback the last alert notification received.

4.3 Step 2 – Voice Recording Alert

By clicking on the Voice Recording Alert button from Step 1, a compose alert form will load for the administrator to complete.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
<p>Alert Degree: <input checked="" type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/></p> <p>Category: <input type="text" value="Select a Category..."/></p> <p>Subject: <input type="text"/></p> <p>Message: (Optional) <input type="text"/></p> <p>Pager / Text Message: (Optional) <input type="text"/></p> <p>Caller ID: (Optional) <input type="text" value="2812074893"/> <input type="button" value="?"/> 305 Characters Remaining for Pager / Text Message</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Voice Recording</p> <p>10 digit (North America) or up to 16 digit (International) phone number where the system can call you to record a voice message with no spaces, dashes or punctuation (e.g., 5551113333).</p> <p>Important: Please prefix international phone numbers with 011 if your number is outside of North America.</p> </div> <p>Phone Number: <input type="text"/> Extension: <input type="text"/></p> <p style="text-align: right;"><input type="button" value="CALL ME"/> <input type="button" value="GO TO STEP 3"/></p>				

4.3.1 Alert Degree

This allows the administrator to color-code the alert based on priority of the message. Each color can be adapted to an organization's notification policy. For example, red alerts can be emergency notifications while green alerts can be general information notifications.

4.3.2 Category

This allows the administrator to assign a category to each alert they send out. Alerts can also be grouped together on the reporting page. Refer to section 4.8 for information on managing these categories.

4.3.3 Subject

The subject field specifies a subject line for email and text messaging. This field also is used as the title of the alert in the reports.

4.3.4 Message

The message field allows the administrator to type the content of their voice recorded message. This way an email or SMS/Text message can be sent along with a voice recorded message. This field is optional.

4.3.5 SMS/Pager Text

The SMS/Pager Text field allows the administrator to type the content of their voice recorded message. This way an email or SMS/Text message can be sent along with a voice recorded message. This field is optional.

4.3.6 Caller ID

The Caller ID field allows the administrator to include the Caller ID number so message recipients know the source of the message they are receiving.

4.3.7 Phone Number

The phone field allows the administrator to type in his/her phone number so that the system can call and the administrator can record a message over the phone. This is done by filling out the form and then clicking on the Call Me button. Once recorded, options will be given to play the recording, call again to record a new message or continue on to the next step of the broadcast alert process.

NOTE: The system has a security feature that will lock out the voice recording feature for an administrator if they attempt to record too many calls before broadcasting an alert. If this happens, please contact a system administrator or customer support.

4.4 Step 2 – Saved Alert

If this option was clicked by administrator in Step 1, then a listing of saved alerts will appear on the page. The administrator can edit the saved alert by clicking on the title. To select the saved alert, click on the radio (circle) button in the right-hand column and then click on the Go To Step 3 button at the bottom of the page.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
--------------------------------	----------------------------	----------------------------	-------------------------------	----------------------

	Title/Subject	Category	Type	Date Modified	Select
1.	Parents/Grandparents Day Test	General	TTS	3/13/2007 8:07 PM	<input type="radio"/>
2.	Report Cards	General	Voice	2/5/2008 1:25 PM	<input type="radio"/>
3.	System Test	General	TTS	2/5/2008 1:25 PM	<input type="radio"/>

GO TO STEP 3 

4.4.1 Creating a New Saved Alert

The administrator can create a new saved alert by clicking on the **Saved Alerts** link in the top menu under the **Alerts** tab. This page will list all current saved alerts as well as a button for creating new messages.

Existing saved alerts can also be deleted on this page by selecting each alert with a check in the box in the right-hand column and then clicking on the Delete Selected button at the bottom of the page. Clicking on either the New TTS Alert or New Voice Alert button will begin the message creation process with an option to save the message once completed. Any alert created during the Broadcast Alert process can also be saved and will be listed under Saved Alerts.

Saved alerts can be made public to all administrators within the organization or restricted to the author of the saved alert. This is done by clicking on one of two icons for the saved alert under the column Type.

Saved Alerts










All of your saved alert messages, also referred to as *pre-defined* messages, are listed below. These are commonly used for established emergency scenarios or routine alert messages.

You can change or delete any of them by clicking on the title or create a new message by clicking on the buttons below. The clock icon next to the date allows you to set the saved alert as a recurring alert that will automatically broadcast weekly, monthly or yearly.

There are two formats of alerts to choose from, text-to-speech (typed message) or voice (recorded message).

NEW TTS ALERT 

NEW VOICE ALERT 

	<u>Title/Subject</u> ▼	<u>Category</u>	<u>Action</u>	<u>Type</u>	<u>Last Modified</u>	<u>Delete?</u>
1.	Parents/Grandparents Day Test	General		 TTS	 3/13/2007 8:07 PM	<input type="checkbox"/>
2.	Report Cards	General		 Voice	 2/5/2008 1:25 PM	<input type="checkbox"/>
3.	System Test	General		 TTS	 2/5/2008 1:25 PM	<input type="checkbox"/>



Saved alert is restricted to the administrator that created the alert.
Click on the lock icon for the alert to make it public to all administrators in organization.

DELETE SELECTED 







Saved alert is public and can be used by all administrators in organization.
Click on the public icon to restrict access to the administrator that created the alert.

A saved alert can also be made recurring. This allows a saved alert to be broadcasted weekly, monthly, or yearly. To access this feature, click on the clock icon next to the last modified date of the saved alert. Ongoing recurring alerts can be suspended by selecting that option under the Status field in the Recurring Option form.

Saved Alerts - Recurring Options

Listed below are the details for the saved alert as well as options for setting up recurring broadcasts for the alert. Setting the status to *Off* under recurring options will erase any current recurring settings you have for this alert. If you wish to save your options but stop recurring broadcasts for this alert, set the status to *Suspended*.

Saved Alert Details 	
Title	System Test
Degree	 Yellow
Category	General
Type	TTS
Message Text	test
Message Audio	N/A (Text to Speech)
SMS/Pager Text	N/A
Groups	Test School

Recurring Options	
Status	Off - No Options ▼
Frequency	None ▼
Start Date	<input type="text"/> 
End Date	<input type="text"/>  (Optional)
Start Time	8:00 AM ▼
End Time	9:00 PM ▼

SAVE 

4.4.2 Modifying / Deleting a Saved Alert

The administrator can modify a saved alert either by clicking on the title during the broadcast alert process or after clicking the **Saved Alerts** link located in the top menu under the **Alerts** tab. Once modified, the saved alert can be saved with changes or saved as a new saved alert, keeping the original intact. Saved alerts can be deleted on the main Saved Alerts listing page by checking the box next to each alert that is to be deleted and then clicking on the Delete Selected button at the bottom of the page.

4.5 Step 3 – Selecting Groups

To send to users on the system, one or more groups must be selected as well as sub-grouping options. Once selected, the administrator can go to Step 4 or go back to Step 2 to edit the message. If a group is in **bold** text, then it is a top level organization group. If this group is selected, it will override all other groups below it since it encompasses the entire organization. Sub-groups (users, grades, languages) will still apply to top level group.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
--------------------------------	----------------------------	----------------------------	-------------------------------	----------------------

Groups	Users	Grades	Languages
<input type="checkbox"/> Test ISD			Administration
<input type="checkbox"/> ... Subs			Administration (1)
<input type="checkbox"/> ... Test ISD - Janitors			Administration (10)
<input type="checkbox"/> ... Test ISD - admin			Administration (1)
<input type="checkbox"/> Test School			High School (11)
<input type="checkbox"/> ... Band			High School (1)
<input type="checkbox"/> ... Spanish			High School (1)

← EDIT MESSAGE

GO TO STEP 4 →

4.5.2 Users Sub-Grouping

If an organization has more than one user type (i.e. parents, students, managers, faculty, etc), then this tab will appear next to the Groups tab. This allows the administrator to select types of users to receive the alert. If this tab is present, then at least one user type *must* be selected.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
--------------------------------	----------------------------	----------------------------	-------------------------------	----------------------

Groups	Users	Grades	Languages
--------	-------	--------	-----------

User Types:
 - Users are categorized by the following types listed below.
 - At least one type must be selected.

Admin
 Faculty
 Parents

✦ EDIT MESSAGE

GO TO STEP 4 ✦

4.5.3 School Grades Sub-Grouping

For school type organizations, the Grades tab will appear. In this case, the required data is the grade level. This allows administrators to further limit what users in a group are broadcasted to. For example, an administrator selects Smith Elementary group checkbox and then selects grade levels 01, 02, and 03. Once the alert is broadcasted, only users with those grade levels belonging to that group will be alerted. To send to entire group, do not check any grade levels.

4.5.4 Languages Sub-Grouping

This tab allows administrators to send to users that have a language preference selected in their profile. For example, if your message pertains to only Spanish speaking users and you select only Spanish, then only users with that language selected in his/her profile will receive the alert. By default, all languages are selected so as to not exclude any users. This option is for grouping intended recipients only, not translation. IRIS handles translation automatically based on user preferences.

4.5.5 Additional Filters Sub-Grouping

This tab allows administrators to further filter users based on more dynamic information such as gender, zip code and specific custom fields that reside within each user's profile. These additional filters may or may not be available based on the organization's settings.

4.5.6 Additional Filters Sub-Grouping with Geographical Areas

As stated above, this feature may or may not be available based on the organization's settings. This particular filter will allow an administrator to select an area on a map and find all recipients within that area that belong to the organization. A weather radar overlay may also be available for the mapping module. This feature is also referred to as GIS or Geographical Information System.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
---------------------------------------	-----------------------------------	-----------------------------------	--------------------------------------	-----------------------------

Groups	User Types	Grades	Languages	Additional Filters
--------	------------	--------	-----------	---------------------------

Additional Filters:

- Select from the available additional filters below to further narrow the list of message recipients.

Geographic Area Filter:

- Click on the link to open a window that will allow you to define geographic areas or if already defined, allow to recreate areas.
- To clear all defined areas for this alert, click on the red button if available.

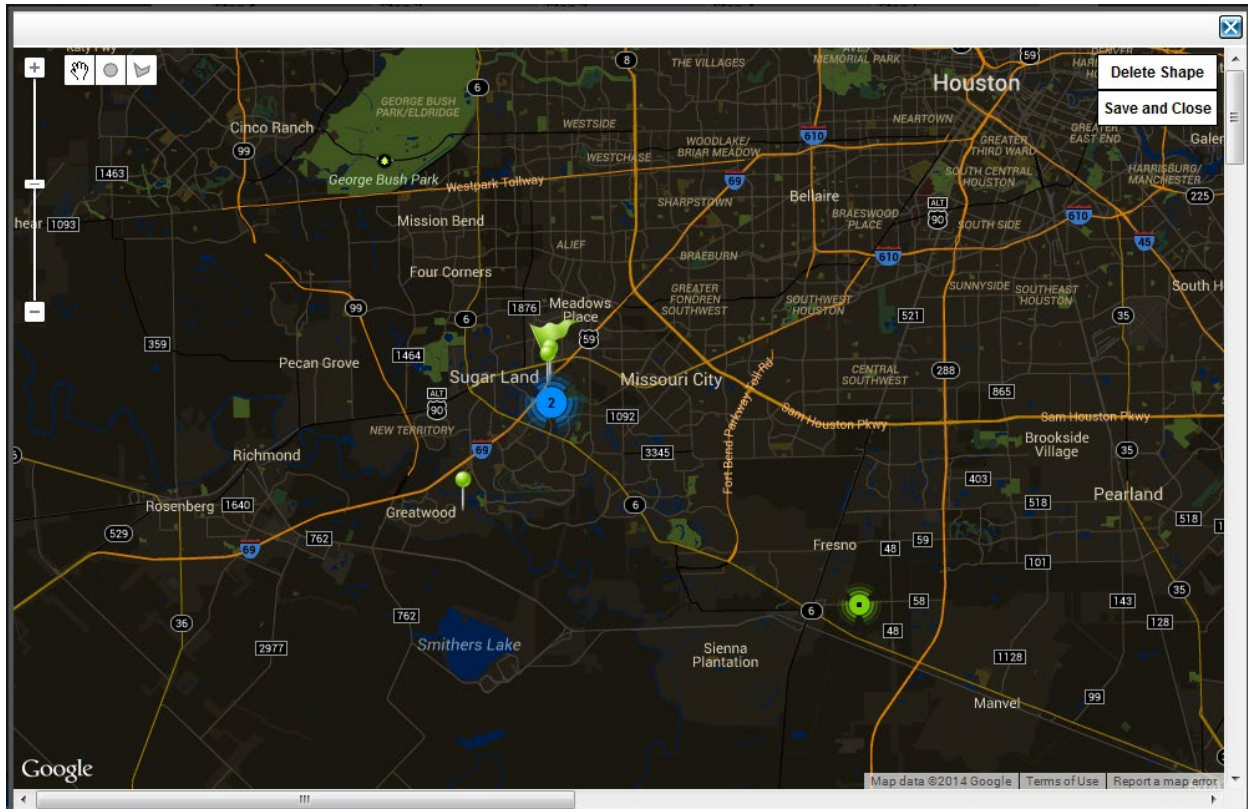
Geographic Area

 [Edit Geographic Area](#)

Zip Code	Gender
<input type="checkbox"/> 33579	<input type="checkbox"/> Male
<input type="checkbox"/> 33611	<input type="checkbox"/> Female
<input type="checkbox"/> 33618	
<input type="checkbox"/> 33635	
<input type="checkbox"/> 55413	
<input type="checkbox"/> 77018	
<input type="checkbox"/> 77030	
<input type="checkbox"/> 77354	
<input type="checkbox"/> 77478	

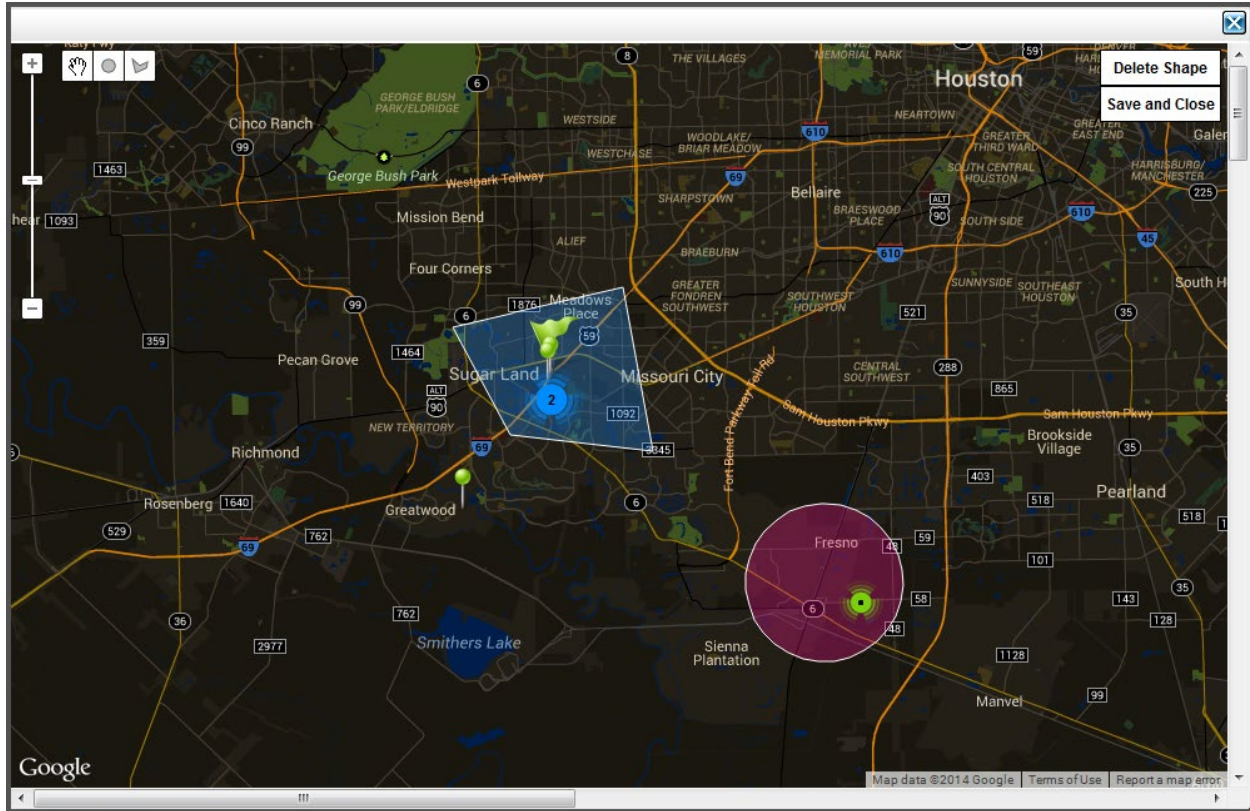
 EDIT MESSAGE	GO TO STEP 4 
---	---

To use this filter, click on the "Edit Geographic Area" link. This will open a small window with the map interface.



To draw a polygon, click on the polygon button in the upper left toolbar and then click anywhere on the map to plot the first point. Then move the cursor to another part of the map and click again to plot the second point. Continue this process until the desired polygon is drawn. On the final plotted point, click the mouse on the first point to finish the polygon. A circle can also be drawn by clicking on the circle button and clicking anywhere on the map to start and then clicking again to finish. Each shape can be edited by clicking on them and dragging the outside points to a desired position. They can also be dragged to a different location by selecting the shape and using the mouse to drag. Shapes can also be deleted by clicking on the shape and then clicking on the Delete Shape button in upper right corner.

Each user is displayed on the map by a colored circle. Depending on the zoom level and the proximity of users, they may be grouped into a circle marker and a quantity displayed. Groups and organizations, if geocoded, are also displayed on the map. Organizations are represented by a green flag and groups are represented by green pins.



Once all polygons/circles have been drawn, click on the Save and Close button in the upper right corner to store all of those points within the database and close the map window. At that point, continue editing other group options and/or finish broadcasting the alert. If a geographic area has been defined, then an option to clear the filter is available on the Additional Filters tab next to the Edit Geographic Area link.

4.6 Step 4 – Confirm Recipients

This step is to confirm the correct groups and sub-groups have been selected and that the total number in each group is correct.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
--------------------------------	----------------------------	----------------------------	-------------------------------	----------------------

Alert Summary

Title	Test
Type	Text-to-Speech
Degree	<input checked="" type="checkbox"/> Green
Category	Testing
Caller ID	(281) 207-4893
Incident?	N/A

Call Scheduling

Start Date	06/01/2020
Start Time	N/A
End Time	N/A

Call Options

Request a conference room for
Select a time period

Allow recipient to request assistance

None

Email Attachment

Upload File : N/A

Message Content

Message Text	Test
SMS / Pager Text	

Selected Groups	User Types	Languages
David Hickey Test Group (1) ^{CA}	Admin Managers Employees General Unassigned Visitor Alumni	English (US)
Total Unique Recipients: 1		

✦ EDIT GROUPS

✦ EDIT MESSAGE

SAVE AS NEW

SEND ALERT MESSAGE

An alert can be scheduled to be broadcasted at a future date and time as well as only go out between a start time and end time each day in the event the broadcast did not finish. The time window is set to the organization default. To broadcast continually until finished, select “N/A” for both start and end times.

If enabled, a dropdown is available to assign the alert to an open incident. This feature may or may not be enabled for the organization. Refer to section 6.0 for Incident Management.

If enabled, an option to upload an email attachment is provided on this page. The file must be 2MB or smaller. An uploaded file will be attached to all outgoing emails for the alert. To upload a file, click on the Upload File link and a small window will appear allowing the administrator to select and upload a file. Once done, the file name will appear in the Email Attachment box.

If enabled for one of the groups selected, the Call options box will appear on this page allowing either a conference room to be set up for recipients in those groups (refer to Section 5.2.3) or for allowing recipient user to request assistance which will be flagged on a report (refer to Section 5.2.4). Conference rooms allow a called recipient to transfer to a room during the call or furnishes a phone number in an email/text message to call in to a conference room.

If the number of recipients is less than 500 users, then all the users will be listed with a checkbox next to their name. This allows the administrator to unselect individual recipients that the alert does not need to be broadcasted to.

All select groups will be listed along with total recipients in each group and an overall total below that. Next to the gray box, the sub-grouping options will be listed. Anything displayed in red will alert the administrator to review his/her grouping selections.



Once all information has been confirmed, the Send Alert Message button should be clicked. The Save As New button allows the administrator to store this alert in the Saved Alerts section as a new saved alert.





4.7 Step 5 – Broadcast

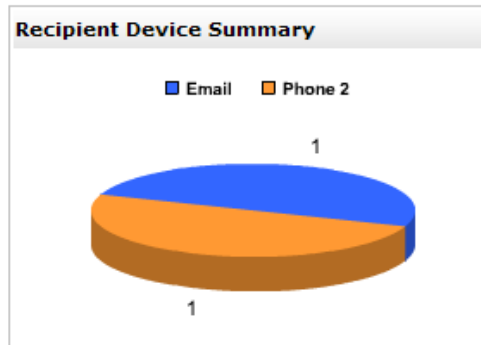
This page will display confirmation that the alert has been sent or scheduled. There will be a list of options to allow for cancelling the alert, viewing more information for the alert and changing the scheduled delivery date/time.

Step 1. Select Message Type	Step 2. Compose Message	Step 3. Select Group(s)	Step 4. Confirm Recipients	Step 5. Broadcast
--------------------------------	----------------------------	----------------------------	-------------------------------	----------------------

Broadcasting - Alert 130915

Alert Details	
Title	Absent From School Today
Status	 Queued to Start
Degree	 Red
Category	Attendance
Sender	Smith, Joe
Created	Wed, 2/25/2009 1:26 PM
Start Date	Wednesday, 2/25/2009
Time Window	8:00 AM to 9:00 PM
Started	----
Ended	----
Calls	0 / 1 Calls Made
Emails	0 / 1 Emails Sent

Options	
	Cancel Alert
	View Groups
	Search Recipients
	Change Schedule Date / Time Window





Message Content	
Message Text	Your child was absent from school today.
Message Audio	N/A (Text to Speech)
SMS/Pager Text	Your child was absent from school today.

4.8 Alert Categories

This page will display all categories that are available when broadcasting an alert. Some categories are defaults and cannot be modified or deleted. Only administrators with access rights to this page will be allowed to manage categories for the entire organization.

Alert Categories

Category	Add/Modify	Delete
+ <input type="text"/>		
1. General	Default	
2. Attendance		

These categories are available for administrators within your organization to assign alerts and other content to. Categories that are grayed out are system defaults and cannot be edited or deleted. New categories can be created and user-defined categories can be modified as well as deleted.

5.0 USER AND GROUP MANAGEMENT

5.0 USER AND GROUP MANAGEMENT

5.1 Manage Users

An administrator should navigate to this section by clicking on the **Users** tab or the **Manage Users** link under the **Users** tab in the system menu. The page below will load first allowing the administrator to search for a specific user by first letter of last name, whole or partial last name, user's phone number, email address, local id (student or employee id), custom fields or by listing all users in a specific group or groups. A result page will appear once the search has been initiated listing all matches. By clicking on the name of a user in the list, the administrator will be able to modify that user's information.

User Accounts

[NEW USER](#) 

List Users by Last Name

Click on a letter below to list all users whose last name begins with that letter:

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Search Users

Search by any of the following:

Last Name

First Name (Optional)

-OR-

Phone Number

-OR-

Email Address

-OR-

Local ID

-OR-

Custom Fields (Custom 1, Custom 2, Custom 3)

[SEARCH](#) 
[RESET](#) 

List Users by Group

Select group(s) below to list all users that are assigned to those groups:

Hold down the CTRL key to select multiple groups.

Normal Test Group
Spanish
Subs
Support Group
Test ISD - admin

[LIST USERS](#) 

Export Updates

Users that have access to the profile administration tool and update their profiles. These changes are logged and can be exported to an Excel file.*

All

[EXPORT](#) 

* Profile changes that are made via file uploads by the organization are not logged here. Only individual changes are logged.


Also available is the ability to export user profile updates. This export will list all changes made by users to their profile if this is allowed by the organization. Refer to section 3.1 as to how users without administrative rights can access their profile.

5.1.1 Modifying User Information

On the following page is the form for changing user contact and personal information. Fields that are denoted by an asterisk (*) are required fields and must not be left blank. This form also allows for changing the username and password of the user as well as the option to assign the user to one or more groups. Users with a language preference other than English can select from different languages as well in which to receive their alerts. Depending on the type of organization, some additional fields may appear (i.e. Grade, Position, etc.). An administrator also has the option to deactivate a user. The user will still be in the system but will not have access to his/her account nor will he/she receive any alert notifications.

Next to each phone contact device is a check box for SMS / Text Message (short message service) which basically denotes whether the phone device can receive text messages. This type of device, more typically than not, will be a cellular phone. Devices with this box checked will receive a text message any time that device is not selected to be called. Refer to the alert degrees for the organization when sending an alert notification to see what devices are contacted. Organizations can have up to 5 phone contact devices enabled (the default configuration is 3 phone contact devices).

Each organization has a default call matrix which is shown for each user under Notified By. An administrator can change this for each user individually based on how that user would like to receive his/her alert notification based on contact device and color degree of alert.

If the user is an administrator of the system, then the icon  will appear at top. If clicked on, a window showing all groups that the user is an administrator of.

5.1.2 Adding a New User

An administrator should navigate to this section by clicking on the **New User** button at the top of the Administer Users page. This form will be identical to the modify user form except all fields will be blank. Administrators should make sure to fill out the form as completely as possible. Remember, each user must be assigned to at least one group to ensure that if that group is selected during an alert notification, the user will be broadcasted to. By default, all groups that are administered by the administrator that is creating the new user will be selected. This can be changed by selecting the correct groups for that user.

Modify IRIS User Account

* - Required field
 Note: Please enter at least one contact phone number AND an email address for notifications.

» **Contact Information:**

Phone Number 1: Ext: Phone 1 Text Msg

Phone Number 2: Ext: Phone 2 Text Msg

Phone Number 3: Ext: Phone 3 Text Msg

Email:

Email 2:

Pager Number: Ext: Alphanumeric Pager?

» **User Information:**

*First Name:

*Last Name:

Middle Initial:

» Primary Address

Address 1:

Address 2:

City:

State:

Zip:

Country:

» Secondary Address

Address 1:

Address 2:

City:

State:

Zip:

Country:

Language:

Gender:

» **Select Group(s):**

Hold down CTRL to select more than one.

- Test School
- Band
- Subs
- Test ISD - admin
- Test ISD - Janitors

» **Account Information:**

Date of Birth (MM/DD/YYYY):

Local ID:

Last 4 SSN:

Username:

New Password:

Verify Password:

PIN:

User Type:

Custom 1:

Custom 2:

Custom 3:


» **Notified By:**

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 1 Text Msg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone 2 Text Msg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone 3 Text Msg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.1.3 Modifying User Information via Users Sign In

Users of an organization *without* administrative rights and who have received a valid username and password may sign in at <https://www.irisdispatch.com/users> to modify their information. Organizations have the option to limit their users to what fields can be modified. Fields that cannot be modified will be grayed out. User information is separated into tabbed sections here. An additional tab is also included to list any alerts received by the user.

Profile Information	Contact Information	Contact Preferences	Alerts Received
> Profile Information			
*First Name:	<input type="text" value="JOHN"/>		
*Last Name:	<input type="text" value="DOE"/>		
Middle Initial:	<input type="text"/>		
*Username:	<input type="text" value="testparent"/>		
New Password:	<input type="text"/>		
Verify Password:	<input type="text"/>		
Language:	<input type="text" value="English (US)"/>		
Gender:	<input type="text"/>		
Date of Birth:	<input type="text" value="01/01/1999"/>		
Last Four Digits (SSN):	<input type="text"/>		
Local ID:	<input type="text" value="-----"/>		
Primary Group:	<input type="text" value="-----"/>		
Custom 1:	<input type="text" value="03"/>		
Custom 2:	<input type="text"/>		
Custom 3:	<input type="text"/>		

SAVE 

5.1.4 Assigning Administrative Rights

Please contact the account executive assigned to your organization or technical help specialist to request a new administrative right assignment or any administrative right changes.





5.1.5 Deleting Users

Administrators only have access to deactivate a user. If a user account needs to be deleted, then please contact the account executive assigned to your organization or a technical help specialist.

5.2 Manage Groups

An administrator should navigate to this section by clicking on the **Manage Groups** link under the **Users** tab in the system menu. The initial page for this section lists all groups that the administrator has rights for as well as a form to create new groups. For school type organizations, the group creation form has additional fields that allow the administrator to assign the new group to a specific school as well as a group level. There is an export option for each group and that process can be started by clicking on the Excel icon for the corresponding group. This will load a page with options to select fields and other filter options for including within the exported spreadsheet.


Groups

Current Groups	Level	Total	
1. Test Organization	Organization		
2. ... Subs	Administration	(1)	
3. ... Test ISD - Janitors	Administration	(10)	
4. ... Test ISD - admin	Administration	(1)	
5. Internal Tests	Administration	(7)	
6. ... Normal Test Group	Administration	(1)	
7. ... Support Group	Administration	(2)	
8. Test School	High School	(11)	
9. ... Band	High School	(2)	
10. ... Spanish	High School	(1)	

Create a New Group


Primary Group:

Group Name:

CREATE GROUP 

*(Total Users Assigned).

Bold groups are system defaults and cannot be modified.

 Option to export users in a group to a spreadsheet file.

5.2.1 Modifying Groups and Assignments

By clicking on a name of a group from the list, the following page will appear. This page allows the administrator to edit the name of the group, edit the address of the group if different from the organization as well as assign users to that group or remove users from that group. If an administrator has rights to only one top-level group, then additional fields are available to allow for customized default caller id and email address that are used when sending an alert.

In the group assignment portion, a search utility is provided to narrow down the user list. By clicking on the Search link, a form will appear to search users by name, user type, email, phone number, grade (school type organizations only) and other groups.

The group level and administrators of the group being modified are also listed in the box at the top, but cannot be edited.

Modify Groups page:

Groups - View & Modify

Edit Group Information

* Group Name: <input type="text" value="Test School"/>	Group Admins: <input type="text" value="No admins exist for this group."/>
Group Address 1: <input type="text"/>	Group Level: <input type="text" value="High School"/>
Group Address 2: <input type="text"/>	
Group City: <input type="text"/>	
Group State: <input type="text" value="Select One"/>	
Group Zip Code: <input type="text"/>	
Group Country: <input type="text" value="United States"/>	

SUBMIT
✔

NEW USER
👤

Assign Users 🔍 Search

Select User(s) To Add To This Group:

Use the search to display users to assign.

Hold down the Ctrl key to select multiple users.

ADD
➔

← REMOVE

Remove Users 🔍 Search

Select User(s) To Remove From This Group:

DOE, JANE (123456)
 DOE, JOHN

Hold down the Ctrl key to select multiple users.

5.2.2 Deleting Groups

Administrators do not have access to delete groups. If a group needs to be deleted, then please contact the account executive assigned to your organization or a technical help specialist. Careful consideration must be made when a group is to be deleted.

5.2.3 Conference Rooms

Conference rooms are available on a group by group basis and allow members of a group access to a conference room following an alert notification for a conference call. For example, this can be used to conference key emergency management personnel. Conference rooms allow a called recipient to transfer to a room during the call or furnishes a phone number in an email/text message to call in to a conference room. For users to be notified of an existing conference room to join as a result of an alert notification, the group that the alert was sent must be conference room enabled and the option selected when sending

the alert (refer to section 4.5). To enable a group for this feature, please contact the account executive assigned to your organization or a technical help specialist.

5.2.4 Assistance Requests

Assistance requests are also available on a group by group basis and allow members of a group to specify if they need assistance during an alert notification, for example, during an area evacuation. For users to be asked this question during a broadcast, the group that the alert was sent must be assistance request enabled and the option selected when sending the alert (refer to section 4.6). When a user receives a call that uses this feature and they respond by pressing the corresponding number key on their touch-tone phone (default key is 5), the result is recorded and is then furnished in the alert report. To enable a group for this feature, please contact the account executive assigned to your organization or a technical help specialist.

6.0 INCIDENT MANAGEMENT

6.0 INCIDENT MANAGEMENT

This feature is *optional* based on the system settings. Incident management may or may not be available based on the organization's account and needs. This tool helps administrators organize alerts and other information into events or incidents and manage those incidents. Various features within this tool allow for this management to occur.

6.1 Incidents

This page lists all the different incidents either created by an administrator as well as closed incidents or incidents that are no longer active. Available actions or options include creating a new incident and search incidents. The search incident option allows the administrator to filter the list of incidents by date range, creator and category. To edit or view an incident in a list, click on the title of the incident.

Incidents

Ongoing Incidents		
Title	Date ▲	Duration
Explosion	6/1/2020 10:30 AM	0h 29m 1s
Flooding	5/29/2020 8:51 AM	3d 2h 8m 11s
Hurricane Incident	3/30/2020 8:15 AM	63d 2h 43m 24s
Covid 19	3/19/2020 1:47 PM	73d 21h 12m 7s

Closed Incidents		
Title	Date ▲	Duration
Test	2/18/2019 11:11 AM	29d 23h 0m 0s
Sample Incident	2/13/2019 12:52 PM	29d 23h 0m 0s
New Incident For TAS	9/20/2018 9:21 AM	30d 0h 0m 0s
Test	9/13/2018 2:35 PM	30d 0h 0m 0s
Test	9/13/2018 2:32 PM	30d 0h 0m 0s
Test	9/5/2018 4:19 PM	30d 0h 0m 0s

Options

[Create a New Incident](#)

[Search Incidents](#)

Incident Summary

Priority	Incidents/Alerts
1	3
2	0
3	6
4	1
5	1

Total Incidents: 10

6.2 Create a New Incident

This page allows the administrator to create a new incident. From here, a title is given to the incident, a category is selected, and a description is typed in. A priority is also assigned. This follows the IRIS 5 color priority scale with 1 (red) being the highest priority to 5 (green) being the lowest priority. Also available is the option to provide a web page for users that contains incident information that can be reviewed as needed in real-time. Once all the information has been selected / filled in, then the incident is created by clicking on the Submit button.

Incidents

Create a New Incident

Title	<input style="width: 95%;" type="text"/>
Category	<input style="width: 95%;" type="text" value="Select a Category..."/>
Description	<div style="border: 1px solid #ccc; height: 100px; width: 95%;"></div>
Priority	Highest 1 <input type="radio"/> 2 <input type="radio"/> 3 <input checked="" type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> Lowest
Web Page?	Yes <input type="radio"/> No <input checked="" type="radio"/> <i>(Optional - Can be added later.)</i>

SUBMIT

6.3 Editing and Managing an Incident

This page allows the administrator to edit and manage an incident. All the details for the incident as well as options or actions the administrator can perform are displayed.

Incidents

Details

Title	Hurricane Incident
Created	03/30/2020 08:15 AM
Closed	----
Category	Demo
Priority	3
Web Page	View Here
Alerts	2
Files	0

Options

- [Edit Incident Details](#)
- [Edit Web Page Content](#)
- [Incident Mapping](#)
- [Close Incident](#)
- [Incident Alerts](#)
- [Incident Files](#)

Assigned Alerts

Eligible Unassigned Alerts

	Title	Category	Sender	Date (CST) ▲	Size
	This Is A Test Alert	Testing	Rodkey, R	Sat, 5/9/20	
	Testing The Alert System	Testing	Rodkey, R	Sat, 5/9/20	






Options include editing the details of an incident, edit the web page content for the optional page that can be provided to users, incident mapping, closing out an incident, viewing/assigning alerts and viewing/assigning files. On initial page load, the assigned alerts are displayed with a tab option to view/assign additional alerts.




6.3.1 Edit Incident Details

This function allows the administrator to edit the details of the incident, most of which was done in the creation process (section 6.2).

Incidents

Details	
Title	Hurricane Incident
Created	03/30/2020 08:15 AM
Closed	----
Category	Demo
Priority	3
Web Page	View Here
Alerts	2
Files	0

Options	
	Edit Web Page Content
	Incident Mapping
	Close Incident
	Incident Alerts
	Incident Files

Edit Details	
Title	<input type="text" value="Hurricane Incident"/>
Created Date	<input type="text" value="03/30/2020 8:15 AM"/> 
Closed Date	<input type="text"/> 
Category	<input type="text" value="Demo"/> ▼
Description	<input type="text" value="This is our incident for the hurricane."/>
Priority	Highest 1 <input type="radio"/> 2 <input type="radio"/> 3 <input checked="" type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> Lowest
Web Page?	Yes <input checked="" type="radio"/> No <input type="radio"/>
Token ID	r4yh0p8p15 







SUBMIT 



6.3.2 Incident Web Page


This function allows the administrator to edit the details for the optional web page that can be provided to users. The content can be typed in the form provided at the bottom of the page. The web page can be secured. Users must have a valid username and password within the system to access a secured web page. To view the web page, a link in the details box can be clicked on. This link can be shared with anyone necessary.

Incidents

Details	
Title	Hurricane Incident
Created	03/30/2020 08:15 AM
Closed	----
Category	Demo
Priority	3
Web Page	View Here
Alerts	2
Files	0

Options	
	Edit Incident Details
	Incident Mapping - 
	Close Incident
	Incident Alerts
	Incident Files

Edit Web Page Content	
Content 	<p>Hurricane landfall imminent. Please take all necessary precautions and evacuate the area using designated evacuation routes.</p>
Secure? 	Yes <input type="radio"/> No <input checked="" type="radio"/>

SUBMIT 

The web page will show users the details of the incident as well as any other provided content. If an area has been defined under incident mapping (section 6.3.3) then a link to display the map with the outlined area(s) will be shown. Also, if any files are attached to the incident (section 6.3.5), those will be made available for download.

IRIS™ Immediate Response Information System
by TechRadium, Inc.

Hurricane Incident

Created	Monday, 3/30/2020 8:15 AM
Category	Demo
Affected Area	Show Map

Hurricane landfall imminent. Please take all necessary precautions and evacuate the area using designated evacuation routes.

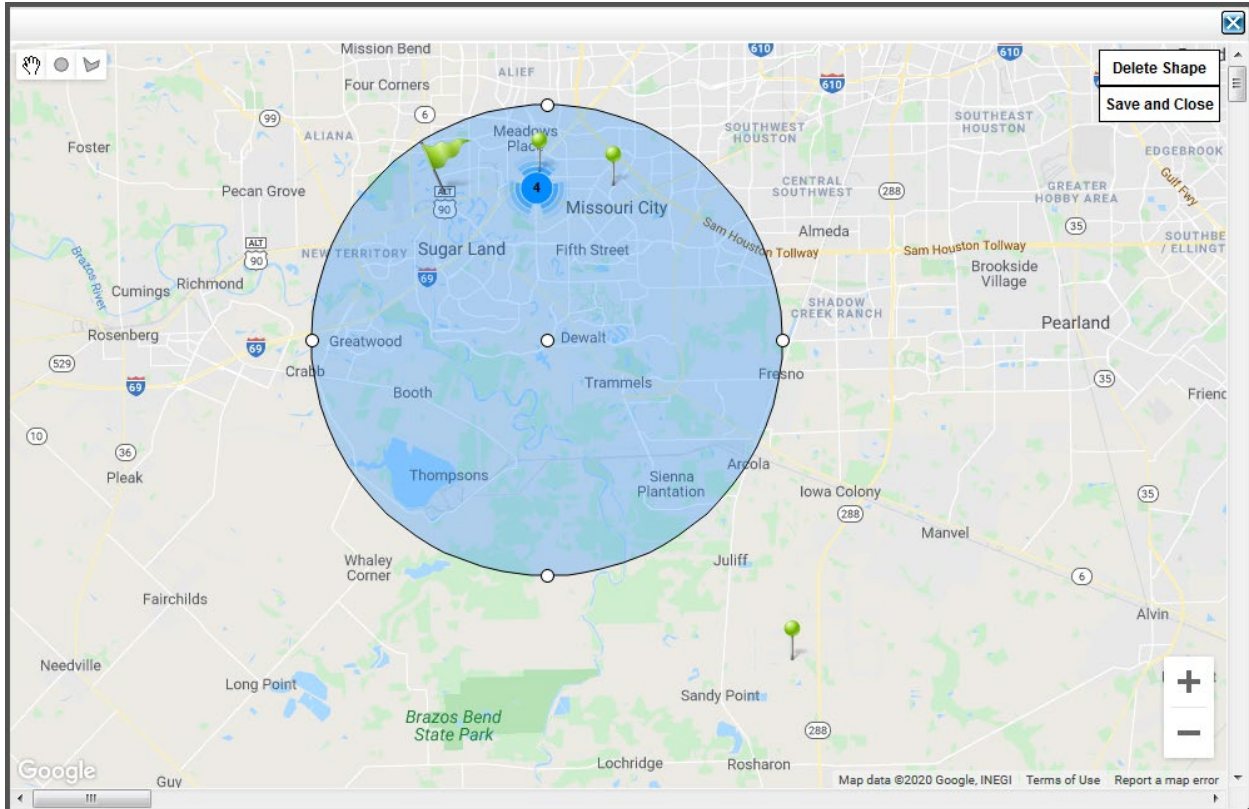
Files Available

Test File	Test
---------------------------	------

Copyright © TechRadium, Inc. , 2020. All Rights Reserved. IRIS is protected by U.S. Patents 7,130,389; 7,174,005; 7,362,852; 7,418,085; 7,496,183; 7,519,165; 7,624,171; 7,684,548; 7,685,245; 7,773,729; and 8,165,274; Patents Pending | [Privacy Policy](#)

6.3.3 Incident Mapping

This function allows the administrator to define one or more areas to highlight the affected zones for the incident. Polygons and circles can be drawn on the map. Circles will display the radius in miles when hovered over. To draw a zone, click on either the polygon icon or circle icon in the top left corner, then click on the desired area on the map. If a polygon, click each point around desired area. Click on the initial point to complete the polygon. For circles, click and hold, then drag to change the size. To edit any zone, click on that zone and click, hold and drag to move shape or click, hold and drag any of the points to resize. To delete a zone, click on that shape and then click on the Delete Shape button. To save any created zones, click on the Save and Close button.



6.3.4 Incident Alerts

This function lists the attached alerts to the incident (refer to image in 6.3). An alert can be assigned to an incident either when sending an alert in step 4 (refer to section 4.6) or here under the Eligible Unassigned Alerts tab. This tab will show alerts that have been broadcasted while this incident has been active. To assign alerts, click on the checkbox of all desired alerts and then click the Assign Alerts button.

6.3.5 Incident Files

This function lists the attached files to the incident that can be made available for users to download. Files can be uploaded using the File Manager tool (refer to section 6.4). To assign a file, click on the Unassigned Files tab, click on the checkbox of the desired files and then click on the Assign Files button.

Assigned Files
Unassigned Files

<input type="checkbox"/> File Name ▼	Size	Date
<input type="checkbox"/> Test File	10 bytes	10/12/2015 12:23 PM


ASSIGN FILES

6.4 File Manager


This page allows the administrator to upload new files that can be assigned to incidents. This page is accessed by the main menu under the Incidents dropdown. To upload a new file, click on the Upload a New File link under Options. This will display the Upload a New File form. Enter the title and description and then click the Browse button to find the file on your computer to upload. Once done, click on the Submit button.

File Manager


Uploaded Files		
Title ▼	Size	Date
• Test File	10 bytes	10/12/2015 12:23 PM

Options	
	Upload a New File

Upload a New File	
Title	<input type="text"/>
Description	<input type="text"/>
File	<input type="button" value="Browse..."/> No file selected.



To edit an uploaded file, click on the title of the file in the list and an edit form will be displayed. The title and description can be changed here. A new file can also be uploaded which will overwrite the current file. All incidents that the file is attached to is listed and can be modified. To save any changes, click on the Submit button. To Delete the file, click on the Delete button. This will remove the file and all associations to any incidents.

Edit File Details	
Title	<input type="text" value="Test File"/>
Date Uploaded	10/12/2015 12:23 PM
Description	<input type="text" value="Test"/>
File	 test.txt
Overwrite File?	<input type="button" value="Browse..."/> No file selected.
Incidents	<ul style="list-style-type: none">Covid 19ExplosionFlooding<li style="background-color: #007bff; color: white;">Hurricane Incident

SUBMIT



DELETE



7.0 SURVEYS

7.0 SURVEYS

This feature is *optional* based on the system settings. Surveys may or may not be available. Refer to section 1.4.1 for contact information regarding system settings and organization setup.




7.1 Survey Creation

This page is accessed via the **Surveys** tab. Current activity is the first thing listed on this page. This shows all active survey templates as well as any scheduled or running instances of those surveys.




To the right of the title of survey template is the date and time when the template was last updated.

The screenshot shows a survey template card. At the top left is the title "Test". To the right of the title is the text "Last Updated: 05/27/2020 4:34 PM" followed by two icons: a pencil and a trash can. Below the title and date are two links: "Show/Hide 1 Instances" with a green up/down arrow icon, and "Show/Hide Questions" with a green up/down arrow icon. At the bottom left is a button labeled "Schedule Survey" with a calendar icon and a green plus sign. At the bottom right is the text "Created By: Hickey, David L".

For each template, a set of available actions is represented by two icons on the right of the last updated date and one icon below the template name.

-  Edit the content of the survey template.
-  Delete the template.
-  Create and schedule a new instance of the survey.

If a template has any instances scheduled or currently running, they can be viewed by clicking on **Show/Hide Instances**. All details of those instances will then be displayed. Administrators will not be able to delete or archive any templates while they have scheduled and current instances. There are three actions for each instance available.

-  Remove the instance.
-  Edit the instance of the survey.
-  Delete / stop the instance.

Test				Last Updated: 05/27/2020 4:34 PM
Show/Hide 1 Instances		Show/Hide Questions		
Name	Date	Time	Status	
Test	05/30/2020	Continuous	Scheduled	
Schedule Survey			Created By: Hickey, David L	

Impacted				Last Updated: 12/20/2018 9:26 AM
Show/Hide 1 Instances		Show/Hide Questions		
Name	Date	Time	Status	
Impacted	12/20/2018	Continuous	Completed Report	
Schedule Survey			Created By: Rodkey, Ryan S	

If an instance is in progress or has completed, there will be a link to the report for that survey.

7.1.1 Creating a New Survey Template

This function can be accessed by clicking on the link **Create Survey** under the **Survey** tab. This page allows the administrator to title the survey template. Once the Continue button is click, the survey template will have been created. The next step is adding survey questions and possible answers to the template.

Create New Template

Template Name:

BACK TO SURVEYS

CONTINUE

7.1.2 Creating a New Survey Template - Content

After completing the title section, now an administrator will be asked to create questions for the survey template and a list of available answers to those questions.

Template for Survey: Test

* Question:

(255 Character Limit)

* Answer 1:

* Answer 2:

Answer 3:

Answer 4:

Answer 5:

Answer 6:

Answer 7:

Answer 8:

Answer 9:

[★ BACK TO SURVEYS](#)[CREATE QUESTION !\[\]\(9dfdaff1d86ba3c1f8353b4d1b61b8c5_img.jpg\)](#)

Each question can have up to 9 available answers to choose from with a minimum of 2 answers required. Click on the Create Question button to save the question and answers. After each question and corresponding answer options are created, a new question and answer form will be made available. Previously created questions can be reviewed and edited by clicking on the question number at the top. Once finished creating all questions and answers, the administrator can go back to the list of surveys by click on the Back to Surveys button.

7.1.3 Creating a New Survey Instance – Schedule Survey

To schedule a new instance of the survey template that was created, from the Surveys page, the administrator can click on the Schedule Survey button for the desired survey template. This will load the Survey Format form. This is where the name of the survey can be edited, and scheduling options can be selected for date and times. Currently, only survey by email is available. Recipients will receive a link in an email that will bring them to an online survey. Once all scheduling options have been made, the administrator will click on the Review Questions button to continue.

1. Schedule Survey	2. Review Questions	3. Choose Recipients	4. Review and Create
Survey Format			
Survey Name:	<input type="text" value="Test"/> required		
Survey Type:	Online (Link Sent in Email)		
Send To:	<input checked="" type="checkbox"/> E-mail		
Start Date:	Today, Thursday, 5/28/2020 ▾		
Start Time:	N/A ▾		
End Time:	N/A ▾		
<p>NOTE: Start and End Times specify the time constraints in which e-mails are sent each day. If an alert is not finished by the specified End Time, then it will resume at the specified Start Time the following day. To run continuously, select N/A for both Start and End Times.</p>			
← BACK TO SURVEYS		REVIEW QUESTIONS →	

7.1.4 Creating a New Survey Instance – Review Questions

This page allows for the review of the survey questions and possible answers. No actions can be performed on this page for those items.

7.1.5 Creating a New Survey Instance – Choose Recipients

This page allows the selection of groups and sub-group options. By select one or more groups, the sub-group option tabs will become accessible. It is required to select at least one group and at least one user type. A user type is a category of users in the system (i.e. employees, students, homeowners, etc.). If an organization has users with language preferences besides English, then those users can be filtered by selecting the preferred language(s) under the Languages tab meaning that the survey will only be sent to those selected users.

One other tab may be available based on organization system settings titled Additional Filters. This tab allows administrators to further filter users based on more dynamic information such as gender, zip code and specific custom fields that reside within each user's profile.

1. Schedule Survey

2. Review Questions

3. Choose Recipients

4. Review and Create

Groups	Users	Languages	Additional Filters
<input type="checkbox"/>	Test Organization		(All Users)
<input type="checkbox"/>	... Subs	Administration	(1)
<input type="checkbox"/>	... Test ISD - Janitors	Administration	(10)
<input type="checkbox"/>	... Test ISD - admin	Administration	(1)
<input type="checkbox"/>	Internal Tests	Administration	(7)
<input type="checkbox"/>	... Normal Test Group	Administration	(1)
<input type="checkbox"/>	... Support Group	Administration	(2)
<input checked="" type="checkbox"/>	Test School	High School	(11)
<input type="checkbox"/>	... Band	High School	(2)
<input type="checkbox"/>	... Spanish	High School	(1)




7.1.6 Creating a New Survey Instance – Review and Create

This page details all aspects of the survey including the content of the survey as well as the intended recipients. To edit any part of the survey, click on the Edit Section button for either format or groups. If the grouping options selected equate to zero users, then the administrator will not be allowed to continue. Click on the Create Survey Instance button to initiate an instance of the survey. This will begin surveying the recipients based on the date and time scheduling. Once created, the administrator will be returned to the initial survey page with the template and instances listed.

1. Choose Devices

2. Review Questions

3. Choose Recipients

4. Review and Create

You have entered the following:

- If this information is correct click "Create Survey Instance Now".
- If you would like to make changes click "Edit Section".

Survey Format



Survey Name	Test
Survey Type	Text to Speech (TTS)
Send To	email
Caller ID	5554641000
Start Time	N/A
End Time	N/A

Survey Content

Survey Question 1	What is your favorite color?
Answer 1	Red
Answer 2	Green


Survey Groups



Groups <ul style="list-style-type: none"> • Test School (3) 	User Types Selected <ul style="list-style-type: none"> • Admin • Faculty • Parents
	Languages Selected <ul style="list-style-type: none"> • English (US) • Spanish (MX)





7.2 Edit a Survey Template



To edit a survey template, click on the  button on the right within the title bar of the survey template on the surveys page. An add form will be displayed for the administrator to add additional questions and answers. Links to current questions are listed at the top of the page. To edit an existing question or any answers for a question, click on the questions number link.



Template for Survey: **Test**

Question : [New](#) | [1](#)

* Question:  

(255 Character Limit)

* Answer 1:  

* Answer 2:  

Answer 3:

Answer 4:

Answer 5:

Answer 6:

Answer 7:

Answer 8:

Answer 9:

 **BACK TO SURVEYS**

SAVE 

DELETE 

New questions can be created by clicking on the Create Question button. Existing questions and answers can be saved by clicking on the Save button or deleted by clicking on the Delete button.

To delete an answer, make the answer field blank if the answer is no longer needed. Each question is required to have at least two answers.

7.3 Edit a Survey Instance

This page allows for the intended recipients to be modified. There are two sections that can be modified, the format of the survey and the intended recipients. This feature is useful if a survey is set to start at a

future date and/or time and changes need to be made. Once any changes have been made, then those changes will be saved by clicking on the Update Survey Instance Format button for format changes and Update Survey Instance Recipients button for grouping changes.

Below is a screen capture of the edit survey instance format form. You can switch back and forth between the format and recipients by clicking on the relevant button. For format changes to be saved, the Update button at the bottom must be clicked.

1. Schedule Survey
2. Review Questions
3. Choose Recipients
4. Review and Create

Survey Format

[EDIT RECIPIENTS](#)

Survey Name:	Test required
Survey Type:	Online (Link Sent in Email)
Send To:	<input checked="" type="checkbox"/> E-mail
Start Date:	Saturday, 5/30/2020 ▼
Start Time:	N/A ▼
End Time:	N/A ▼

NOTE: Start and End Times specify the time constraints in which e-mails are sent each day. If an alert is not finished by the specified End Time, then it will resume at the specified Start Time the following day. To run continuously, select N/A for both Start and End Times.

BACK TO SURVEYS

UPDATE FORMAT

Changing recipients for a scheduled instance will show the group and recipient selection form (refer to 6.1.5). Any changes must be saved by clicking on the Update Recipients button.

7.4 Survey Reports

The initial report page lists all surveys and their status listed in descending order by date. Also listed is the time window (set time or continuous). The status of the survey indicates if the survey is scheduled, complete or currently running.

Survey Reports

	Survey Name	Created by	Date	Time	Status
1.	Test 2	Joe Smith	5/29/2020	5:00 PM - 7:00 PM	Complete
2.	Test	Joe Smith	5/28/2020	Continuous	Complete

By clicking on the title of the survey on the list above, a detail page for that survey will be displayed. This page shows the question and answers for the survey as well as the responses. Other information included is the type, groups sent to, number of recipients, contact devices, date / time, and the status of the survey.

Report for Survey: Test

Overview	Results	Recipients	>> Back to Index
-----------------	----------------	-------------------	--

Survey Details	
Groups	Band
User Types	Admin, Faculty, Parents
Languages	English (US), Spanish (MX)
Devices	Email
Recipients	2
Scheduled Date	Thursday, 5/28/2020
Scheduled Time	Continuous
Status	Complete

Survey Questions	
Question 1	What is your favorite color?

The results of the survey listed by question and what answers were selected are listed under the Results tab. A more detailed listing of responses is listed under the Recipients tab and allows for an export of the results to an Excel spreadsheet.

8.0 REPORTING

8.0 REPORTING

8.1 Alerts Summary

An administrator should navigate to this section by clicking on the **Reports** tab in the system menu or the **Alerts** link under the **Reports** tab. The initial page for this section lists all alerts scheduled or in progress for the organization with the date / time information and who sent the alert. Scheduled alerts can be canceled from this page if listed. Forms are available at the top for searching for specific alerts and recipients based on various parameters. A list of total alerts per category is also listed and those alerts can be accessed by clicking on the category name. On the bottom of the page is some graphical statistics for alerts sent.

Message Reports - Summary

In-Progress / Scheduled Alerts	Sender	Status	Cancel?
<input type="radio"/> Test	Smith, J	Queued	

Search Messages

Sender:

Group:

Category:

*Start Date:

*End Date:

Type:

SEARCH

Search Recipients

Category:

*Last Name:

Phone Number:

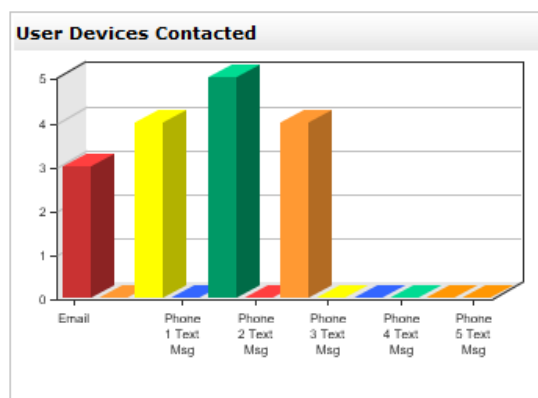
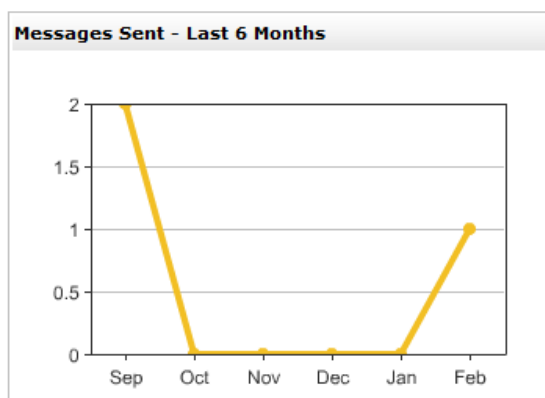
Local ID:

*Start Date:

*End Date:

SEARCH

Message Category	Total
1. General	143
2. Attendance	3



By either searching for alerts using the search form or clicking on a category or a segment in one of the two graphs, a listing of those alerts will be provided.

8.1.1 Search Alerts

If a search is performed using the search form on the alerts summary page or one of the segments in either of the two graphs are clicked both of which are also on the alerts summary page, then a result page listing those alerts will be displayed. The page will also provide the search parameters at the top which can be changed and a new search submitted. The listing will show the alert degree, title, category, sender, date sent and size (total recipients compared to total users in the organization). The list can be sorted by clicking on the column headers. To view the details of an alert, click on the title of a specific alert.

Reports - Search Alerts

Search Parameters					
Sender:	All	Start Date:	02/27/2008		SEARCH
Degree:	Green	End Date:	02/27/2009		
Category:	All	Type:	All		

Search Results

	Title	Category	Sender	Date (CST) ▲	Size
<input checked="" type="checkbox"/>	Test SMS	General	Smith, J	Tue, 5/13/08 1:02 PM	
<input checked="" type="checkbox"/>	Test Email Alert	General	Smith, J	Tue, 4/1/08 9:43 AM	
<input checked="" type="checkbox"/>	Testing Email Only	General	Smith, J	Wed, 3/26/08 10:14 AM	
<input checked="" type="checkbox"/>	Testing Email SMS	General	Smith, J	Wed, 3/12/08 11:04 AM	

8.1.2 Alert Categories

If a category is clicked on the alerts summary page, then a list of all alerts under that category will be displayed. This list includes the alert degree, title, sender, date sent, and size (total recipients compared to total users in the organization). Alerts can be reassigned to different categories by selecting each alert's checkbox and then selecting the appropriate category in the "Move selected alerts to category" drop down menu. There is also a drop down menu to change the listing to a different category.

Reports - Alert Category

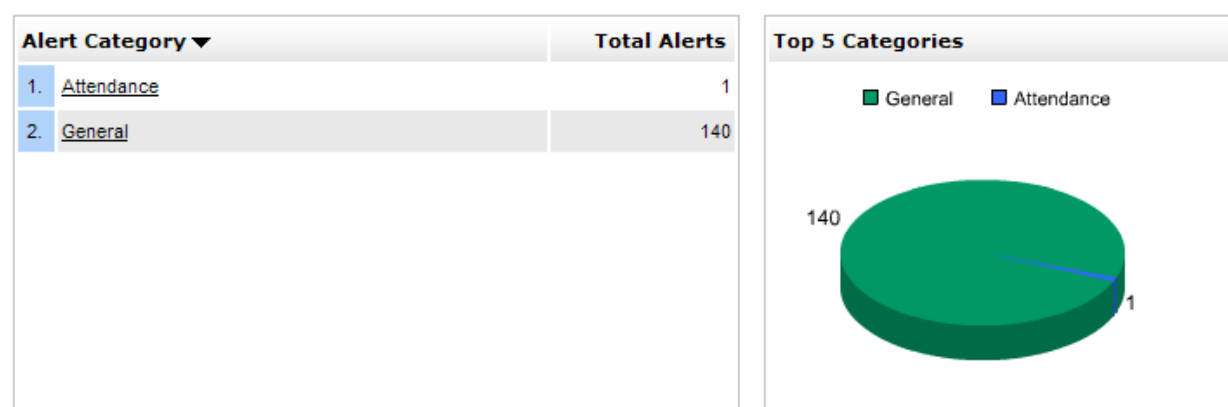
Listed below are all alerts for the selected category. To change the category, select a different category from the drop down menu below. To move any of the listed alerts to a different category, select the alerts and then the desired category.

Current category: Move selected alerts to category: [Complete Category Listing](#)

<input type="checkbox"/>	Title	Sender	Date (CST) ▲	Size
<input type="checkbox"/>	Absent From School Today	Smith, J	Wed, 2/25/09 1:26 PM	

All categories can be seen by clicking on the Complete Category Listing link.

Reports - Alert Categories



8.2 Alert Details

By clicking on the title of the alert, the contents of that alert can be viewed. This will show the title, sender, degree, date / time information and the actual message. The administrator has several options on this page including the ability to cancel the alert if in progress, edit & resend the alert, and delete the alert.

Cancelling the alert will stop any calls not currently in the queue and keep them from going out. Edit & Resend allows an administrator edit the message and recipients and send as a new alert. By deleting the alert, all recipient information will be deleted as well. This action is permanent. The delete alert function may be disabled depending on an organization's policies.







Another option available is the ability to post the alert on social media. Currently, Facebook and Twitter are available options. This can only be done on this page after the alert has been created.

Other options include: Export Contacted Summary, Search Recipients, View Groups, View Message Content and Resend Based on Status.

Alert details page:

Reports - Alert 13548053

Alert Details	
Title	Test
Status	Completed
Degree	Red
Category	General
Incident	----
Sender	Smith, Joe
Created	Thu, 3/10/2016 3:17 PM
Start Date	Thursday, 3/10/2016
Time Window	8:00 AM to 9:00 PM
Started	Thu, 3/10/2016 3:17 PM
Ended	Thu, 3/10/2016 3:19 PM
Calls	2 / 2 Calls Made
Emails	1 / 1 Emails Sent

Options	
	View Groups
	Search Recipients
	Export Contacted Summary
	Edit and Resend Alert
	Share 0
	Tweet

Recipient Status Summary	
<p>A pie chart showing the distribution of recipient statuses. The green section, representing 'Human' recipients, accounts for 2 out of 3 total recipients. The blue section, representing 'Email' recipients, accounts for 1 out of 3 total recipients. A legend below the chart identifies the colors: blue for Email and green for Human.</p>	
<p><i>Click desired section within chart to view detail.</i></p>	

Message Content	
Message Text	This is a test.
Message Audio	N/A (Text to Speech)
Pager / Text Message	Test.

The Resend Based on Status option allows an administrator to send the same alert to recipients based on their present call status. For example, the alert can be re-sent to all recipients with a call status of “No Answer”.

Depending on what option is selected from the Options box, the box on the bottom of the page could be the Message Content as shown above or change to any of the following.

All groups and sub-groups, including additional filters, are shown if the View Groups link is clicked.

Groups	Usertypes	Languages
Band	Admin Faculty Parents	English Spanish

If the alert is scheduled to go out at a future date/time then the Change Schedule Date/Time Window link is available. This will provide a form to change those parameters for the alert.

Change Scheduled Date/Times

Start Date:

Start Time:

End Time:

SUBMIT

The Search Recipients box as well as a list of recipients is shown if the Search Recipients link is clicked or a portion of the pie chart is clicked.

Search Recipients

Call Status Human Machine No Answer Unreachable Duplicate

Device Type Phone 1 Phone 2 Phone 3 Email Text Msg Pager

Email Status Email Sent Received Bounced

Last Name

Group

SEARCH **EXPORT**

Recipient ▼	ID	Type	Contact ID	Status	Date/Time (CST)
Smith, Joe		Email	david@techradio.cm	Email Sent	10/1/2015 4:20 PM

Each recipient listed has their name, contact type, contact ID (phone number or email address), status of the contact and the date/time contacted. A list of call status definitions is provided by clicking on the link Call Status Definitions.

Another feature on this page is the ability to export the list of recipients that is currently displayed to an Excel spreadsheet.




Call Status Definitions

Call Made to Extension	Call was made to a phone extension and message was left with machine/voicemail.
Canceled	Alert was canceled prior to user being contacted.
Do Not Contact Phone / Email / Pager	User has opted out of receiving notification on a device. Device was not contacted.
Duplicate Contact	First occurrence of number that is in same alert multiple times is contacted and all others set to duplicates as to not contact the user on a single device more than intended.
Email Sent	Email message successfully sent to user.
Email Received	Email message successfully received by user. Requires acknowledgement by user.
Human Answer	Call was answered by a person and listened to in its entirety.
Machine Answer	Call was answered by a machine/voicemail and message was left.
No Answer	Call was attempted multiple times but neither a person or machine/voicemail answered.
Pager	Call was made to a pager and the pager return number was transmitted.
Phone Call Disconnected	Call was answered but a person disconnected the call before end of message.
SMS Error	Text message attempted to be sent to user but failed.
SMS Message Sent	Text message successfully sent to user.
SMS Message Received	Text message successfully received by user. Requires acknowledgement by user.
Unreachable	Call was attempted but could not be completed as dialed. Number may be out of service.
Updated (User Called In)	A person called the IRIS system to listen to the message.

8.3 Email Responses

This feature is *optional*. Organizations can capture incoming responses via email from any recipients of recent alerts broadcasted. This allows for two-way communication with the administrator and the recipient. The list of responses can be narrowed down using the filter parameters at the top of the page.


Reports - Email Responses

Filter Parameters	
Start Date:	06/01/2020 
End Date:	06/02/2020 
Subject / Title:	<input type="text"/>
Status:	<input checked="" type="radio"/> All <input type="radio"/> New Responses (No Reply Sent) <input type="radio"/> New Replies From Users SEARCH 

Responses


Response From	Subject	Date (CST) ▲	Reply
Hickey, D	Re: Test	Mon, 6/1/20 12:10 PM	

To reply to a response, click on the envelope icon in the Reply column. This will open a pop-up window with a form that has a message box to type in the reply. Once the reply has been completed, the Submit button will send the reply to the user via email.

Email Reply 

Respond via Email

User Name	Hickey, David
Email	david.hickey@parker.com
Message	<div style="border: 1px solid gray; padding: 5px; min-height: 150px;"> <pre>>Replying to alert email. ></pre> </div>



SUBMIT 

8.3 SMS Responses

This feature is *optional*. Organizations can capture incoming responses by recipients via SMS / text message from any recent alerts broadcasted. This allows for two-way communication between the administrator and the recipient. The list of responses can be narrowed down using the filter parameters at the top of the page. A summary is also included that shows responses by group.

Reports - SMS Responses

Filter Parameters


Start Date:  End Date: 

User's Last Name:




Phone Number:

Group:

Keyword / Phrase:

[SEARCH](#) 


Responses

Response From	Phone	Message	Date (CST) ▲	Reply
Unknown	(888) 374-3741	Okay	Wed, 4/8/20 11:25 AM	
Rodkey, Ryan	(713) 788-7122	I am ok	Mon, 3/30/20 7:22 AM	
Unknown	(214) 987-6258	Thanku	Fri, 3/13/20 12:51 PM	

Response Summary by Group


#	Group	SMS Reply	Call In
1.	All TechRadium Employees	1	0
2.	Need Assistance Test	1	0
3.	Ryan Rodkey - Demo Group	1	0
4.	Ryan Rodkey - WaterPro Lunch 2018	1	0
5.	Sample Test Group	1	0

To reply to a SMS / text message response, click on the phone icon in the Reply column. This will pop-up a window with a form that has a message box to type in the reply. Once the reply has been completed, the Submit button will send the reply to the user via SMS / text message. Character limits apply here with the default being 145 characters.

SMS Reply 

Respond via Text Message (SMS)

User Name	Rodkey, Ryan
Phone Number	[REDACTED]
Message	Thank you! <small>145 Characters Text Message</small>

SUBMIT 

8.5 Survey Reports

Refer to section 7.4 for more details on survey reports.

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9.0 INDEX

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