How to Use Settings

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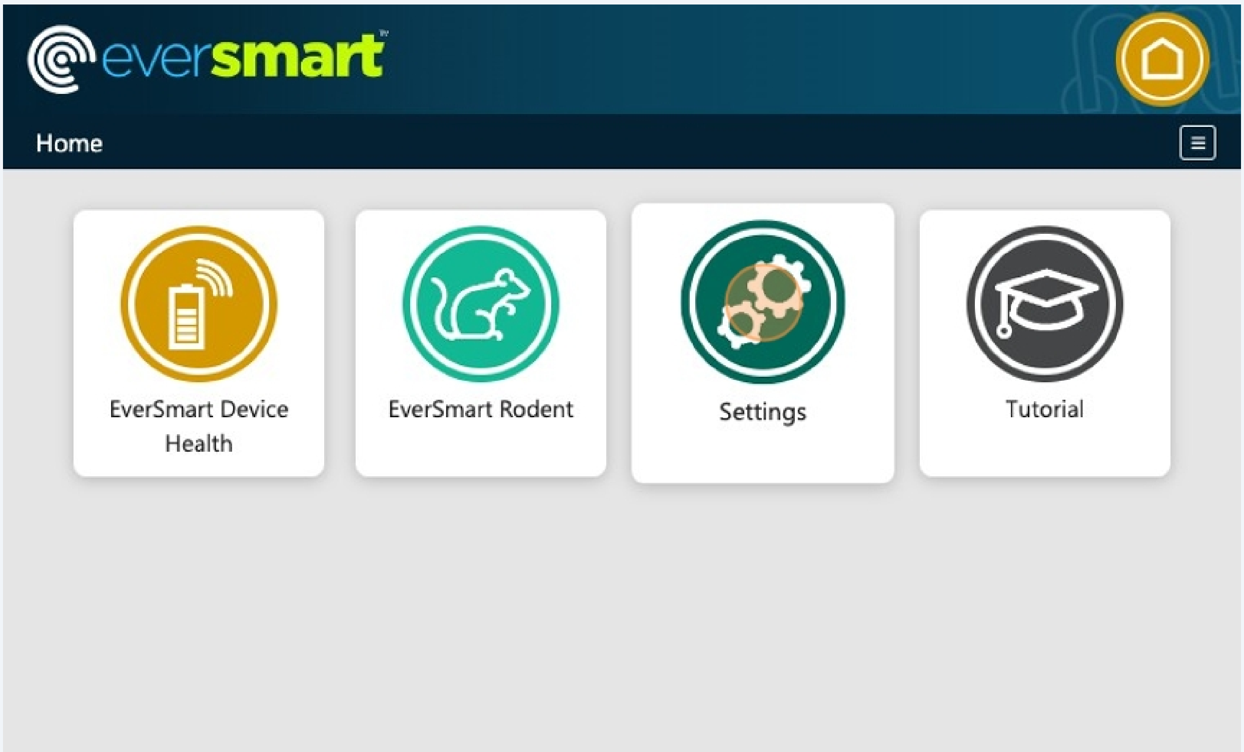
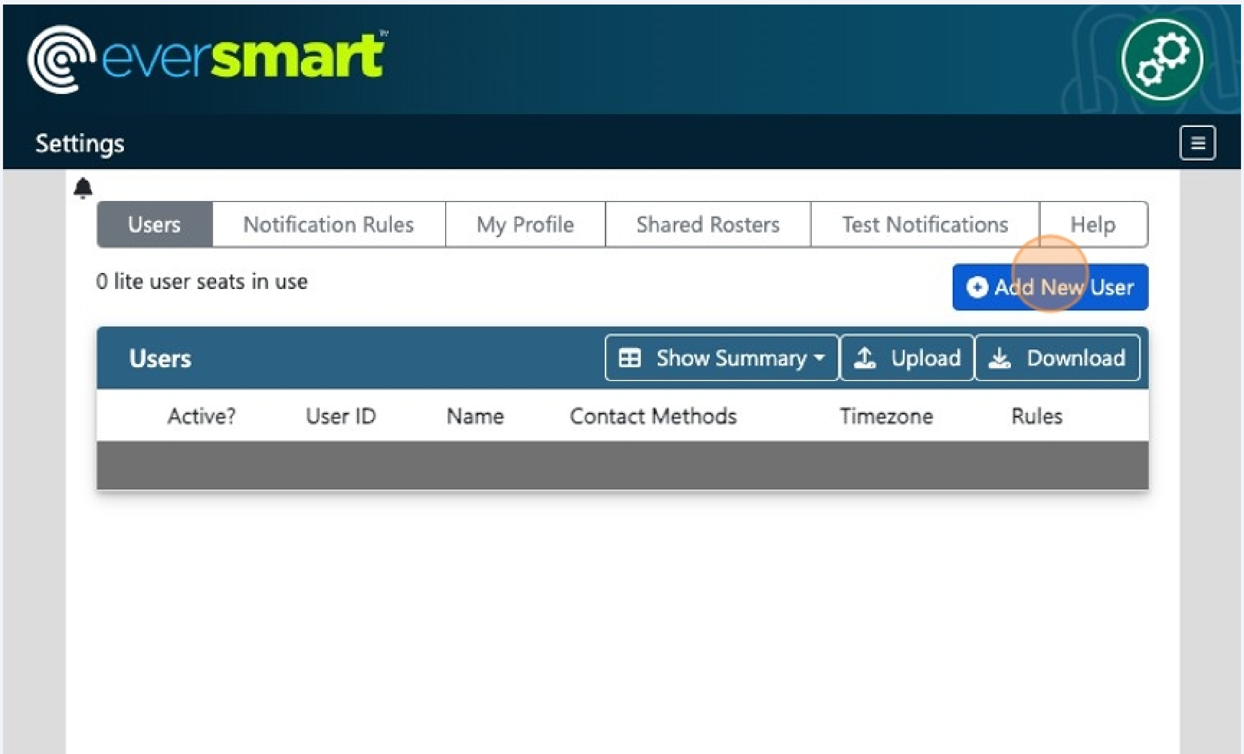
Use the Settings dashboard to configure users and notification rules for receiving notifications from EverSmart Alert

1 Open Settings



2 Start by clicking "Add New User" to add a new user to receive notifications

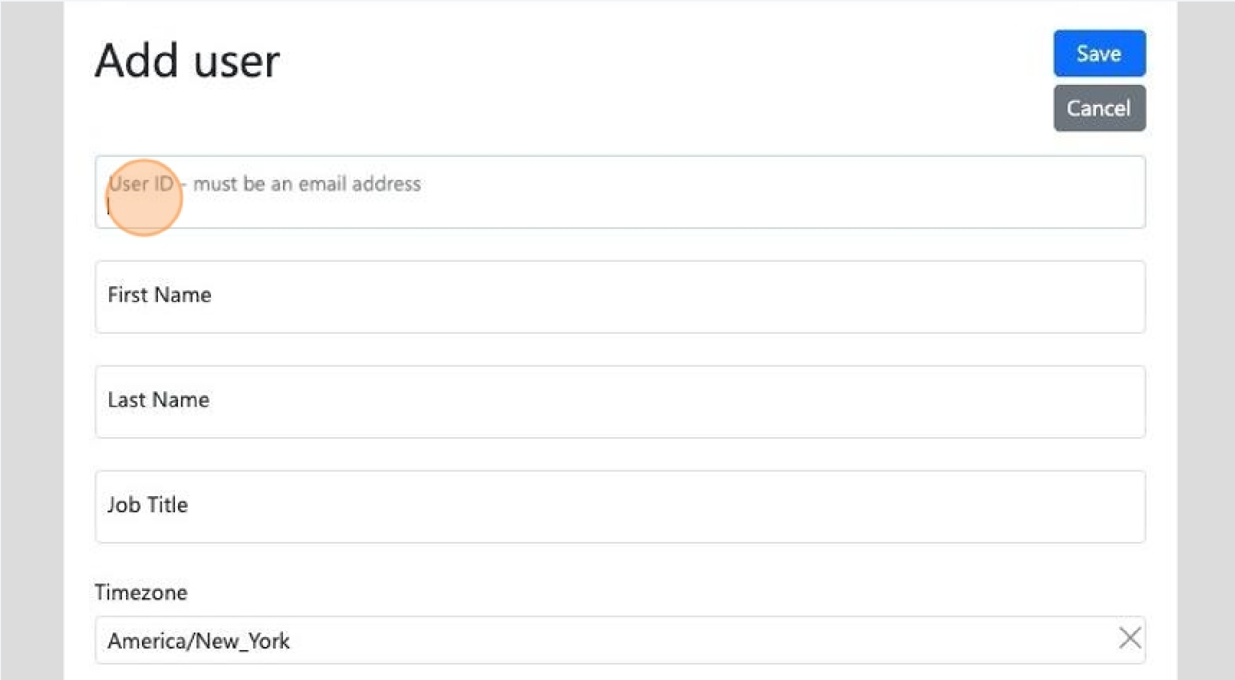


If you have removed users from the Settings without fully deleting them, you will see Add User as a dropdown instead of Add New User as a button. To add a New User via the dropdown, click Add User, then click Add New User on the bottom of the dropdown.

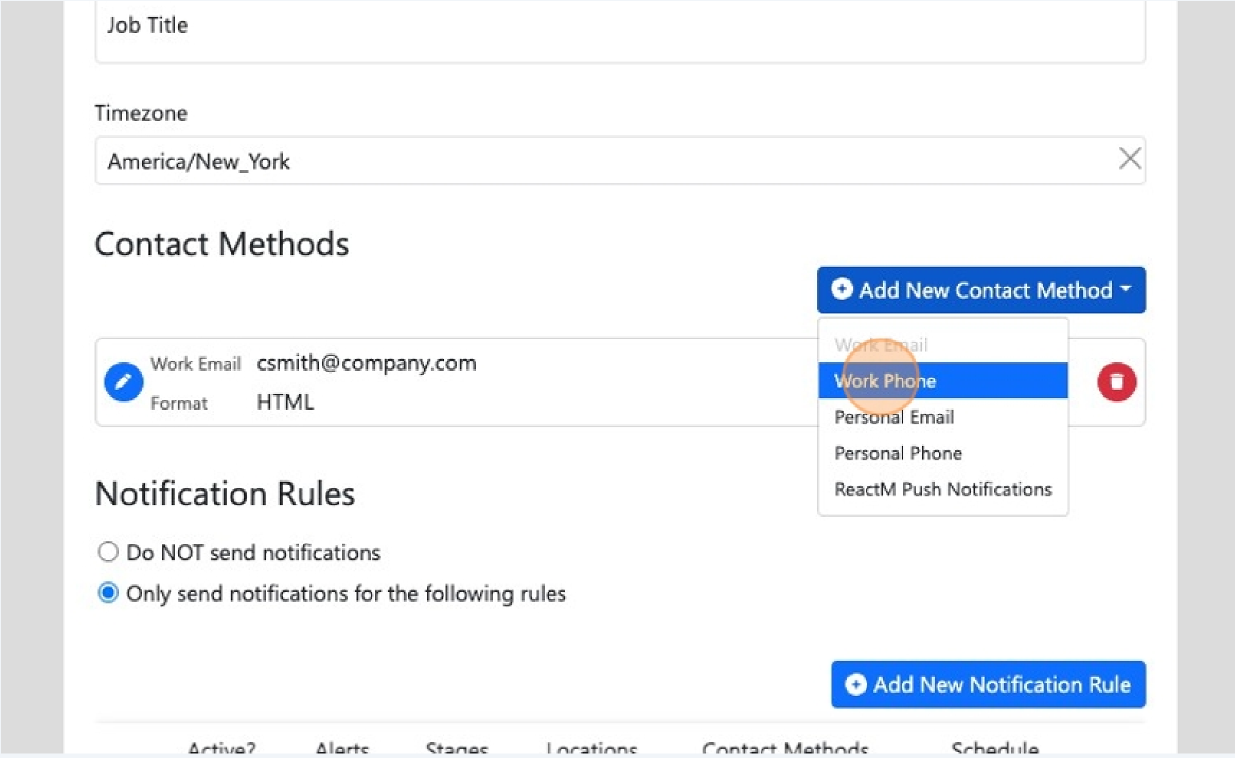
3

Enter an email address for the User ID.

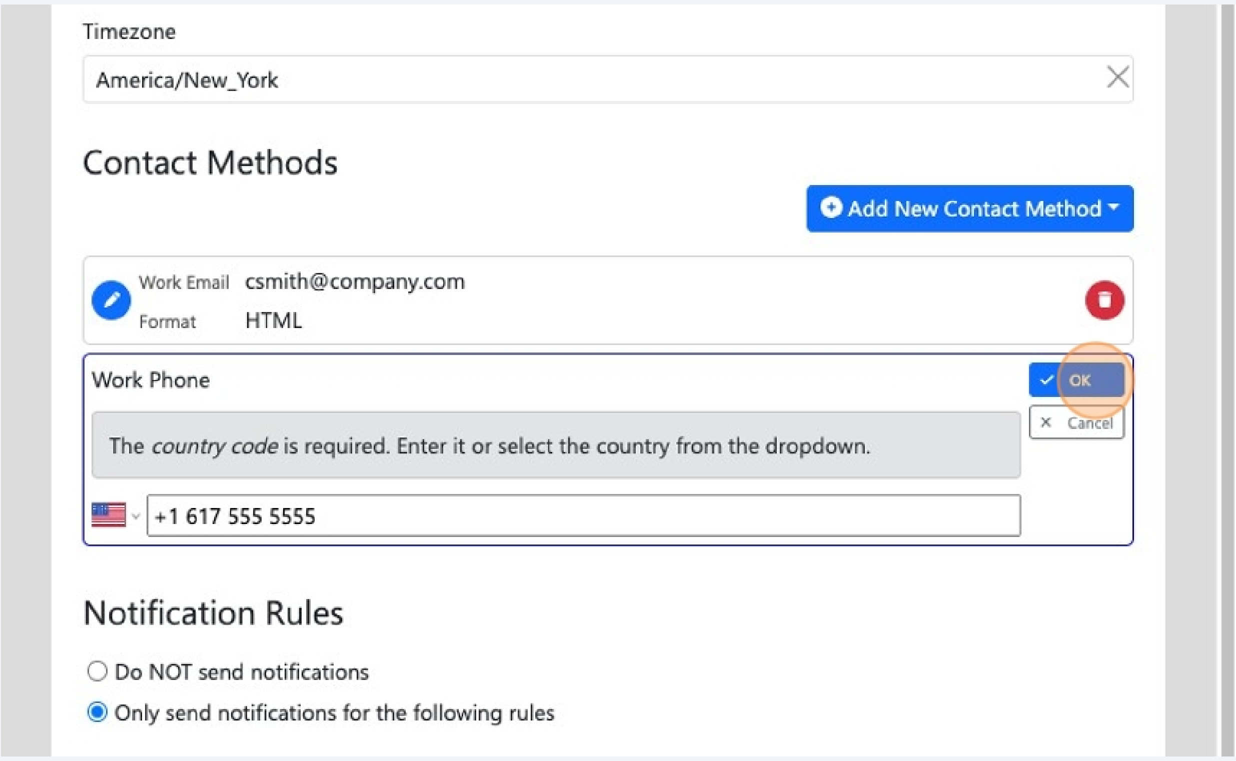
"First Name" and "Last Name" are also required fields, but "Job Title" is optional. "Timezone" defaults to your local timezone, but you can change that by clicking the drop down.



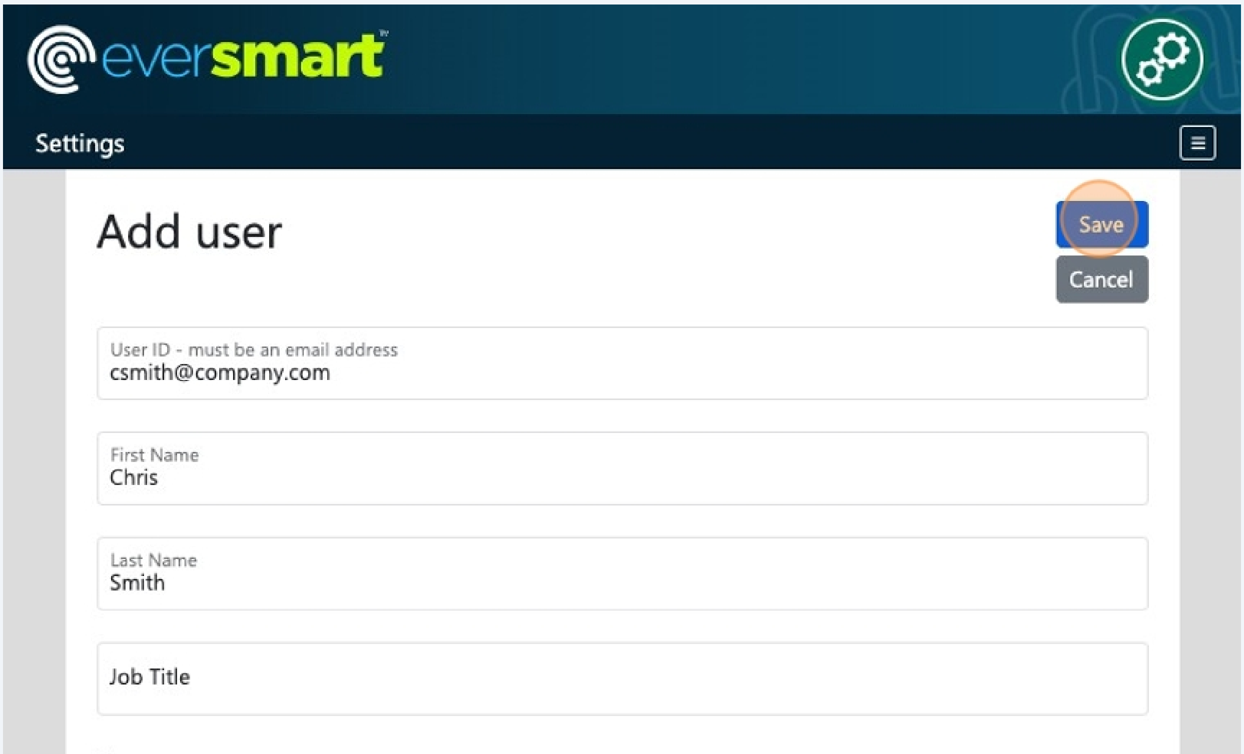
4 To enable SMS notifications, click "Add New Contact Method", then select "Work Phone" or "Personal Phone"



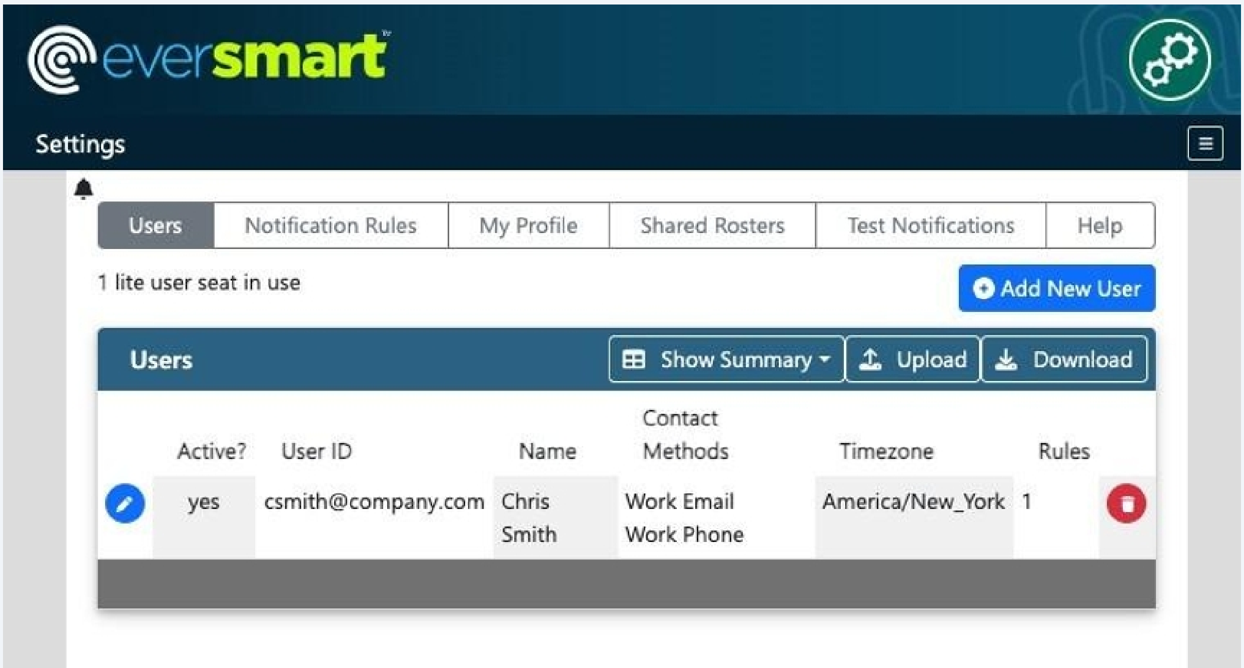
5 Enter the phone number and click "OK"



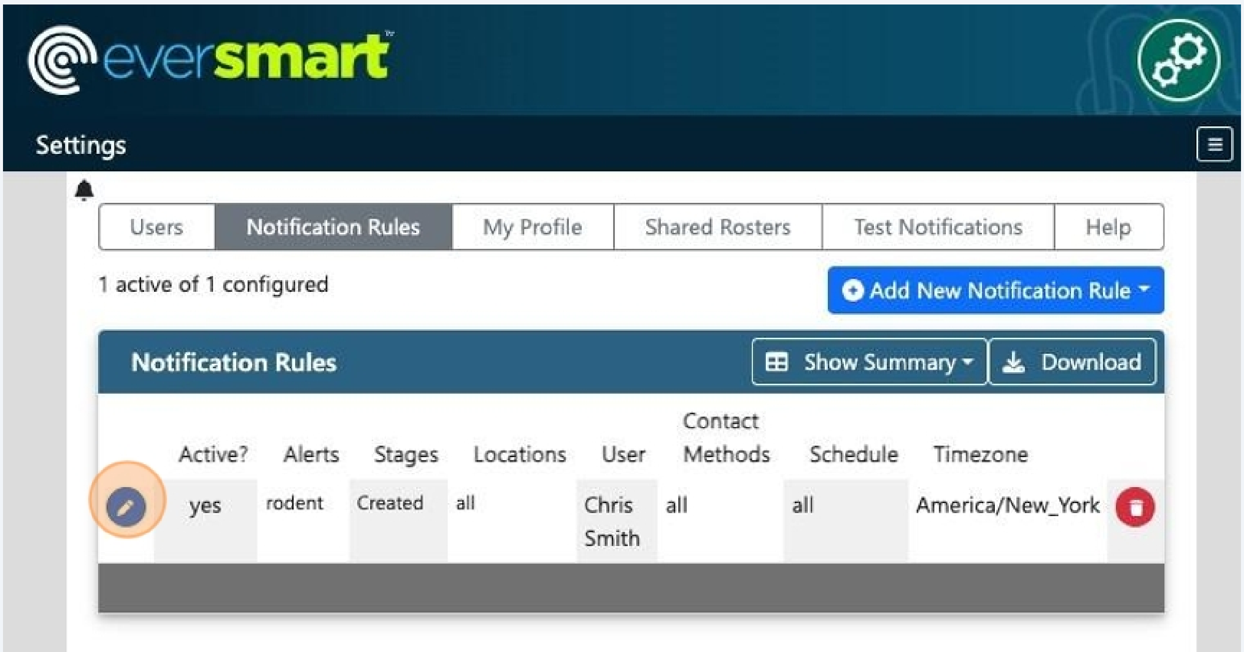
6 IMPORTANT - click the "Save" button to save the new user



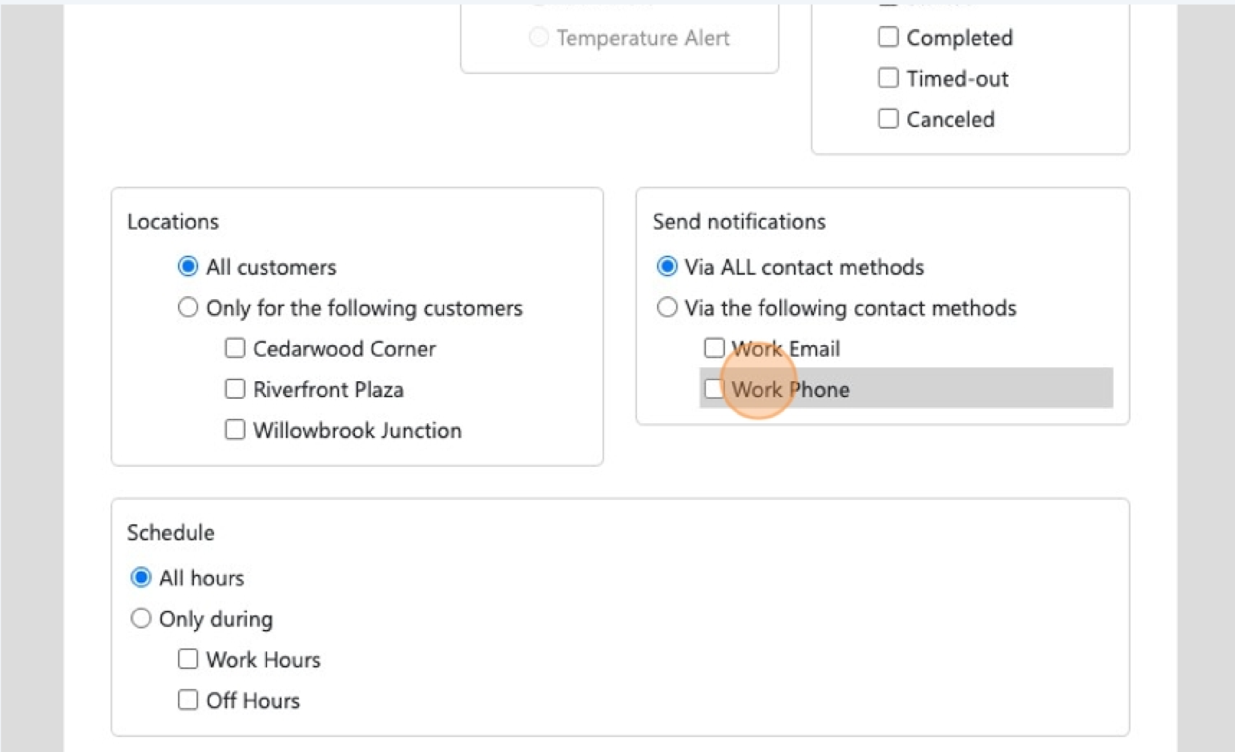
7 Review the users in your configuration on the "Users" tab. You can click the "Pencil" icon to edit an existing user, the "Trash" icon to delete an existing user, or the "Add New User" button to add a new user to your configuration.



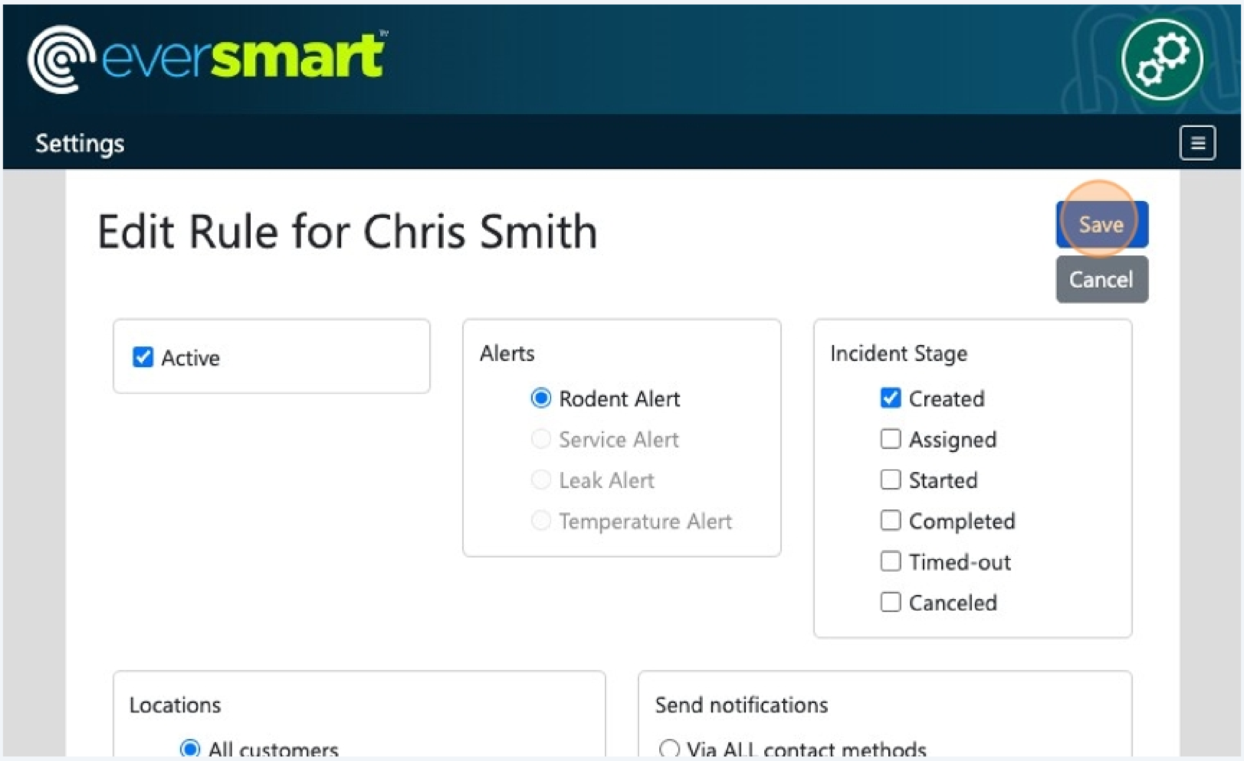
8 Use the "Notification Rules" tab to review all the notification rules for all users in your configuration. Click the "Pencil" icon to edit an existing Notification Rule.



9 Edit this rule to filter by location, filter by work hours vs off hours, or choose which contact method(s) to notify.

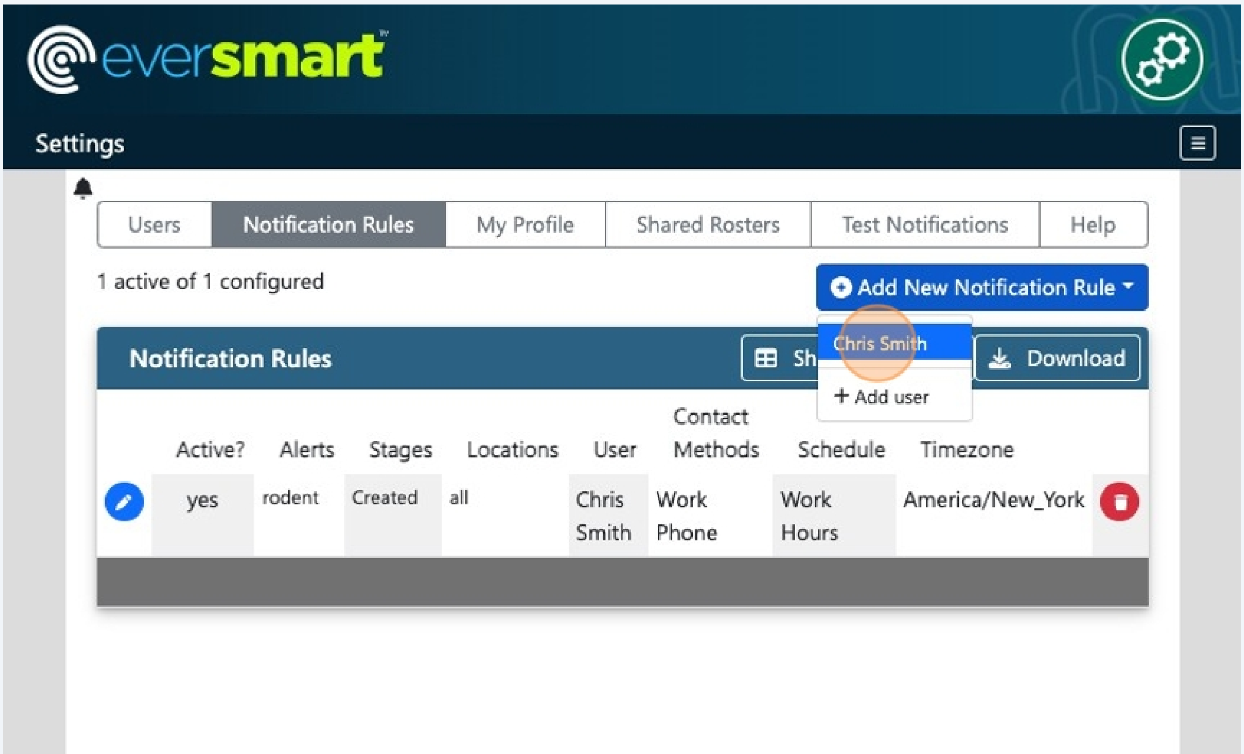


10 IMPORTANT - Click "Save" to save the changes to the notification rule

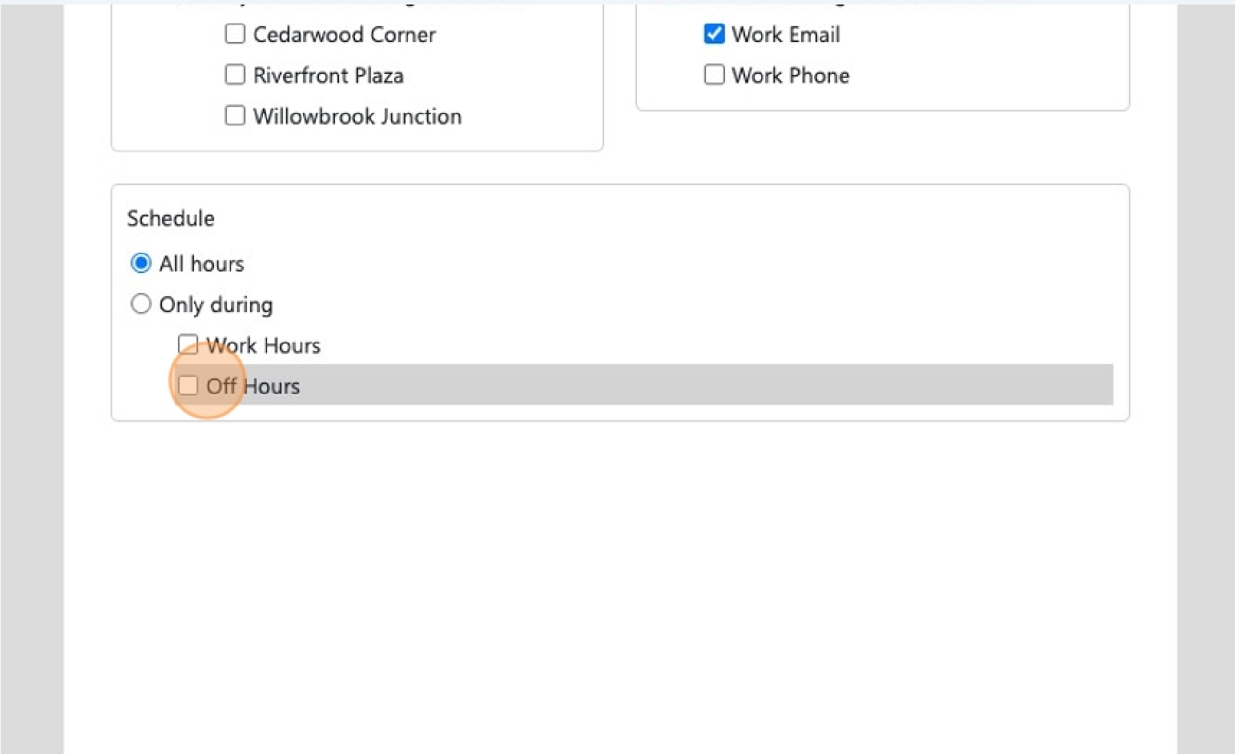


11 To add a new Notification Rule, click "Add New Notification Rule" then choose the existing user.

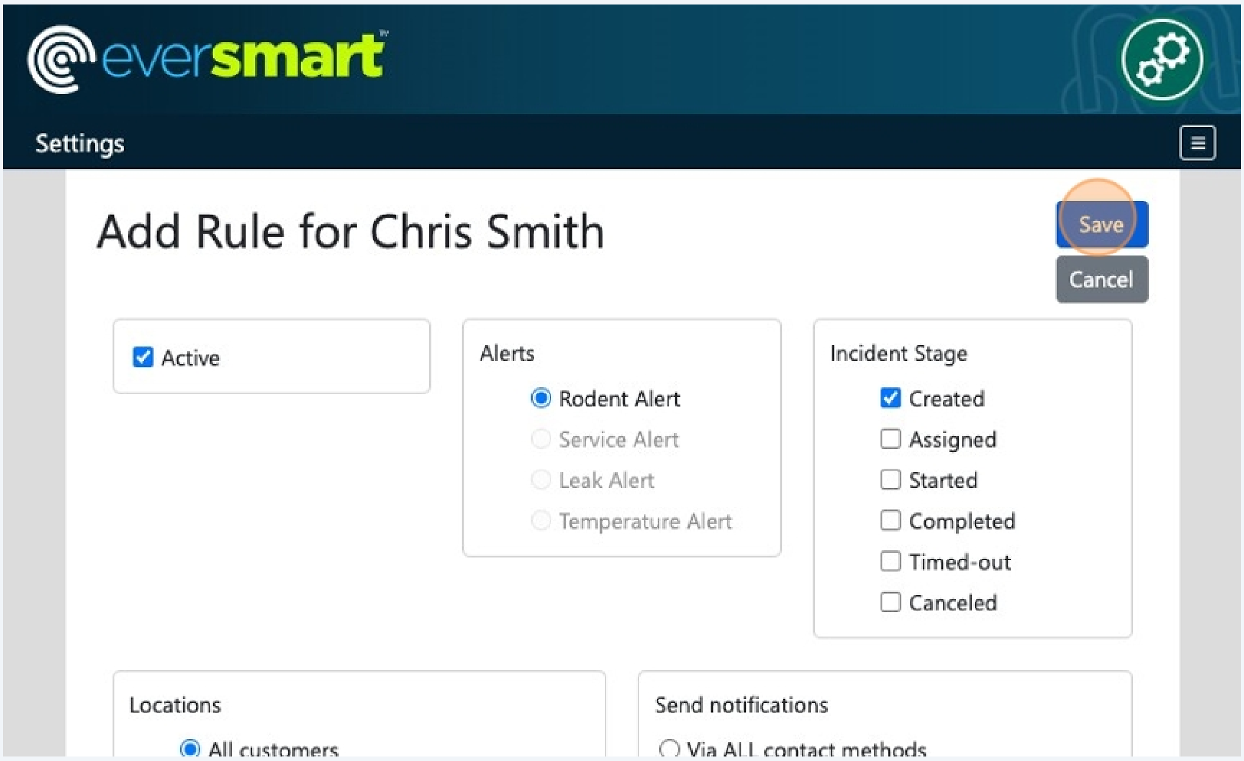
Tip: you can add a new user in the same step by choosing the "Add user" option at the bottom of the user list.



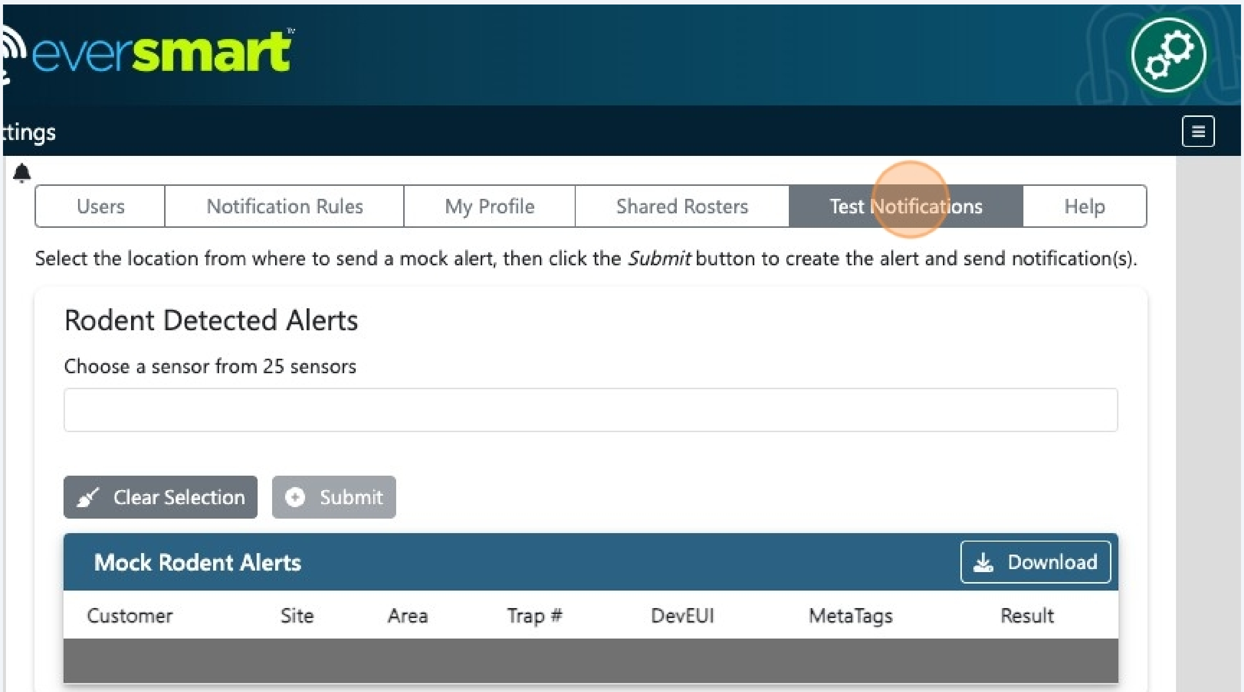
12 For example, configure a new rule to text the user if an alert occurs at "Cedarwood Corner" or "Riverfront Plaza" during off hours.



13 IMPORTANT - Click "Save" to add the new notification rule

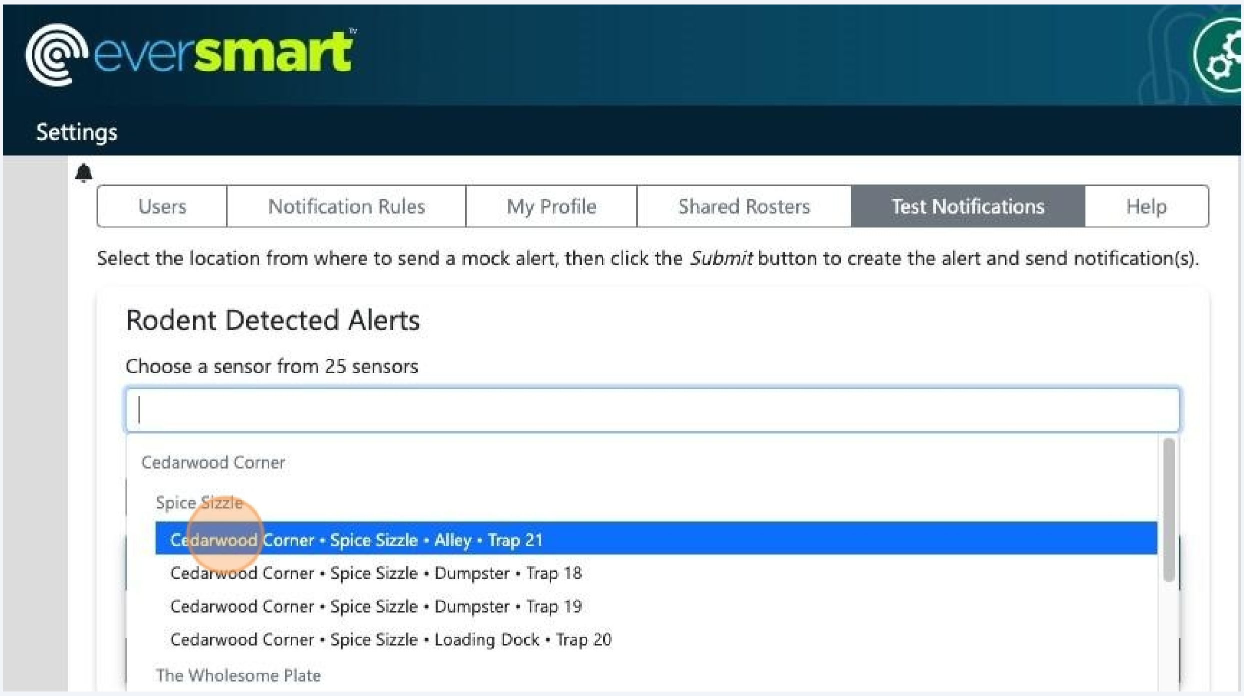


14 You can test your configuration on the "Test Notifications" tab.

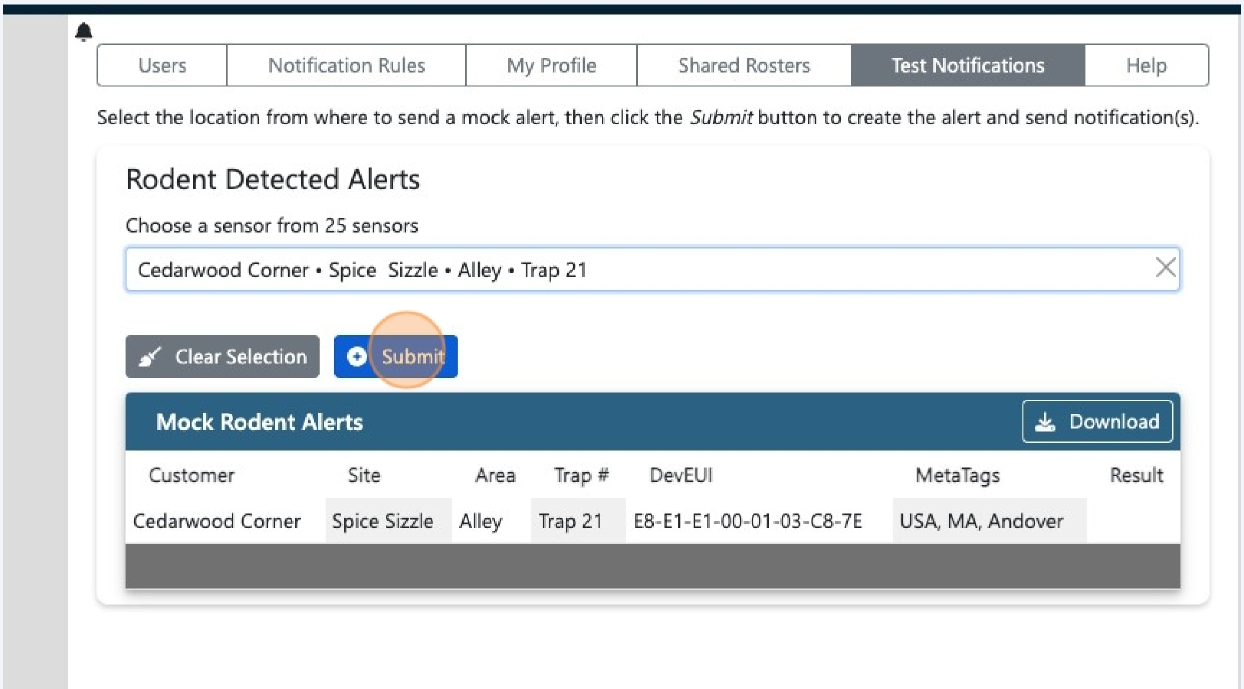


15 Find the sensor you would like to test and click to select it.

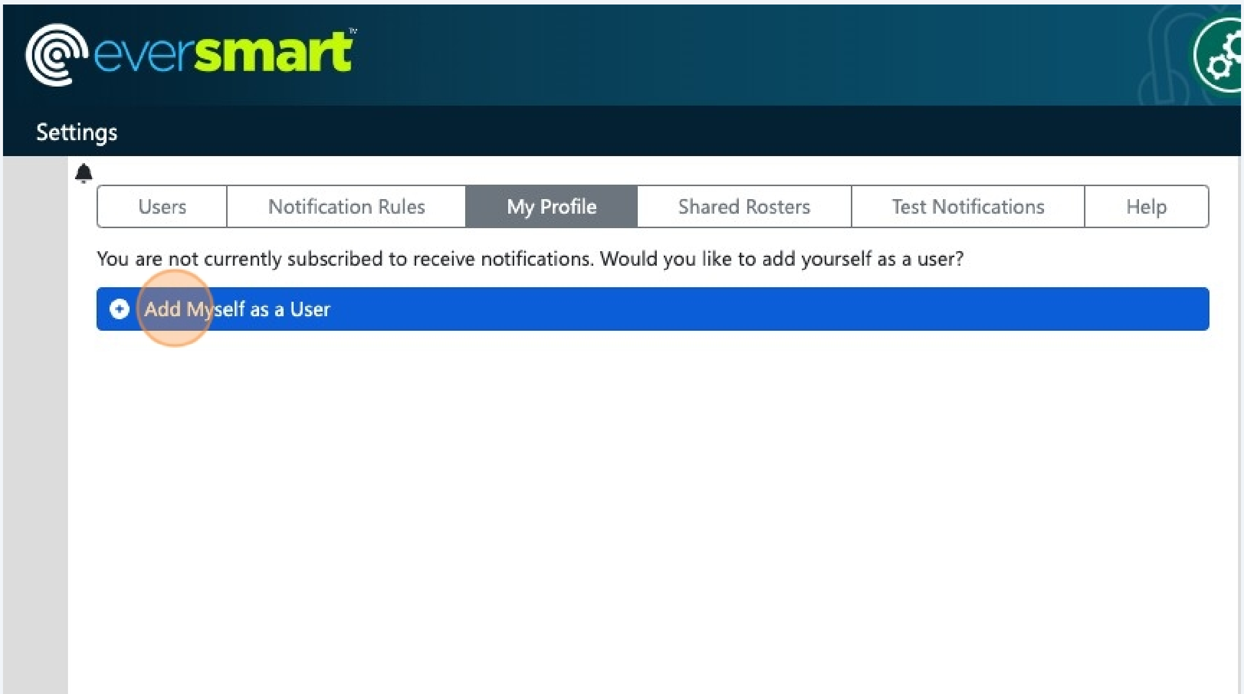
TIP: if you have a large number of sensors, you can enter text to search for the one you want.



16 Click "Submit" to generate the alert and send the applicable notifications.



17 To configure your personal notification settings, click the "My Profile" tab, then click "Add Myself as a User"



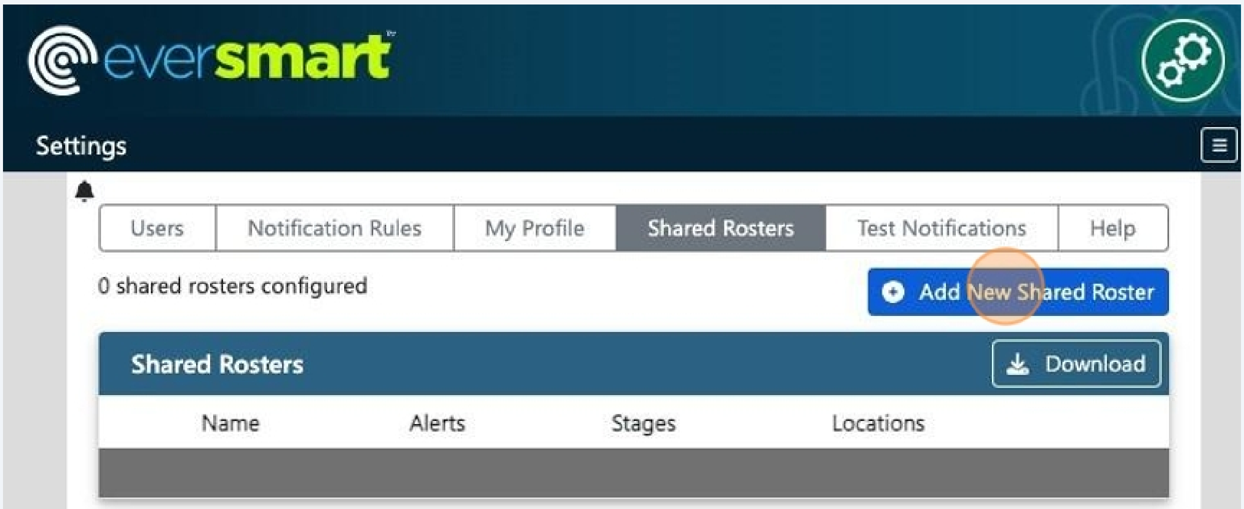
18 To make changes, click the "Edit" button

19

Use the "Shared Rosters" tab to review the shared rosters in your configuration. A shared roster is a kind of global rule that any user can link to.

Shared rosters are designed for large configurations where the workforce is organized into teams with assigned locations that may change over time. With shared rosters, the administrator can easily change the assigned locations of a whole team at once.

To add a new shared roster, click "Add New Shared Roster"

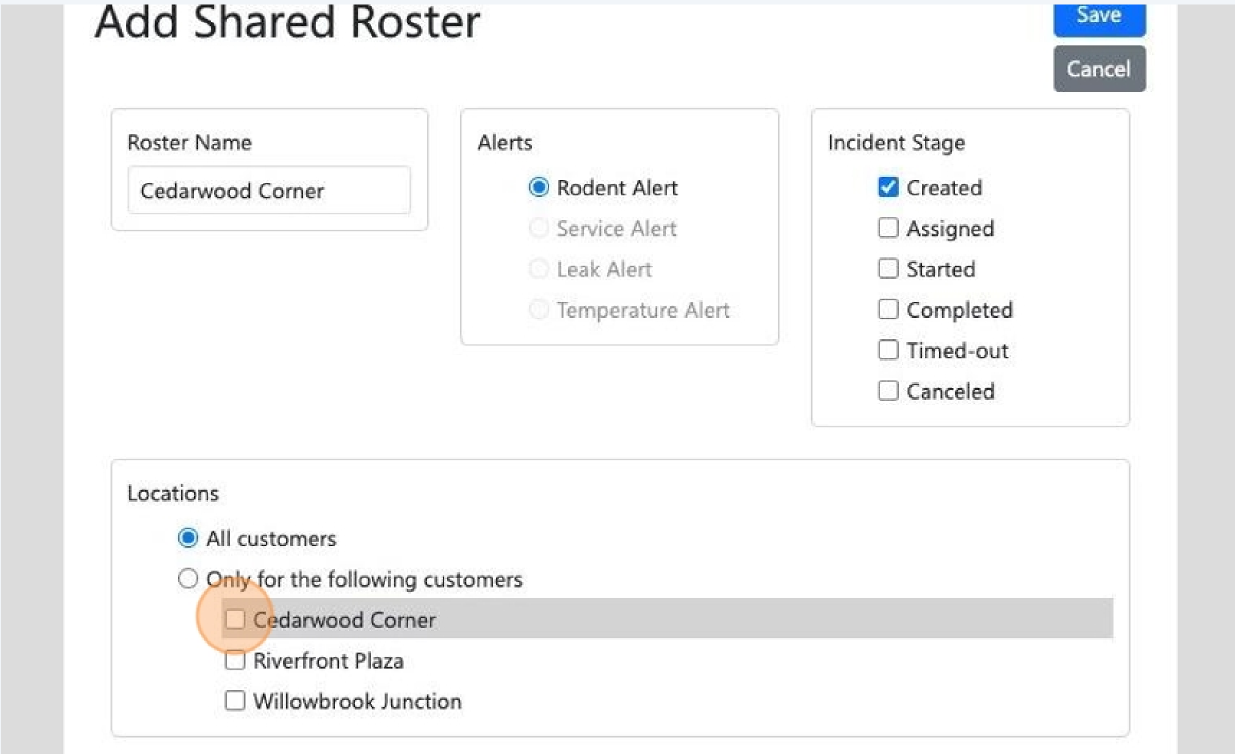


Shared rosters are added / changed / deleted globally by administrators via this page and are then accessible by all users.

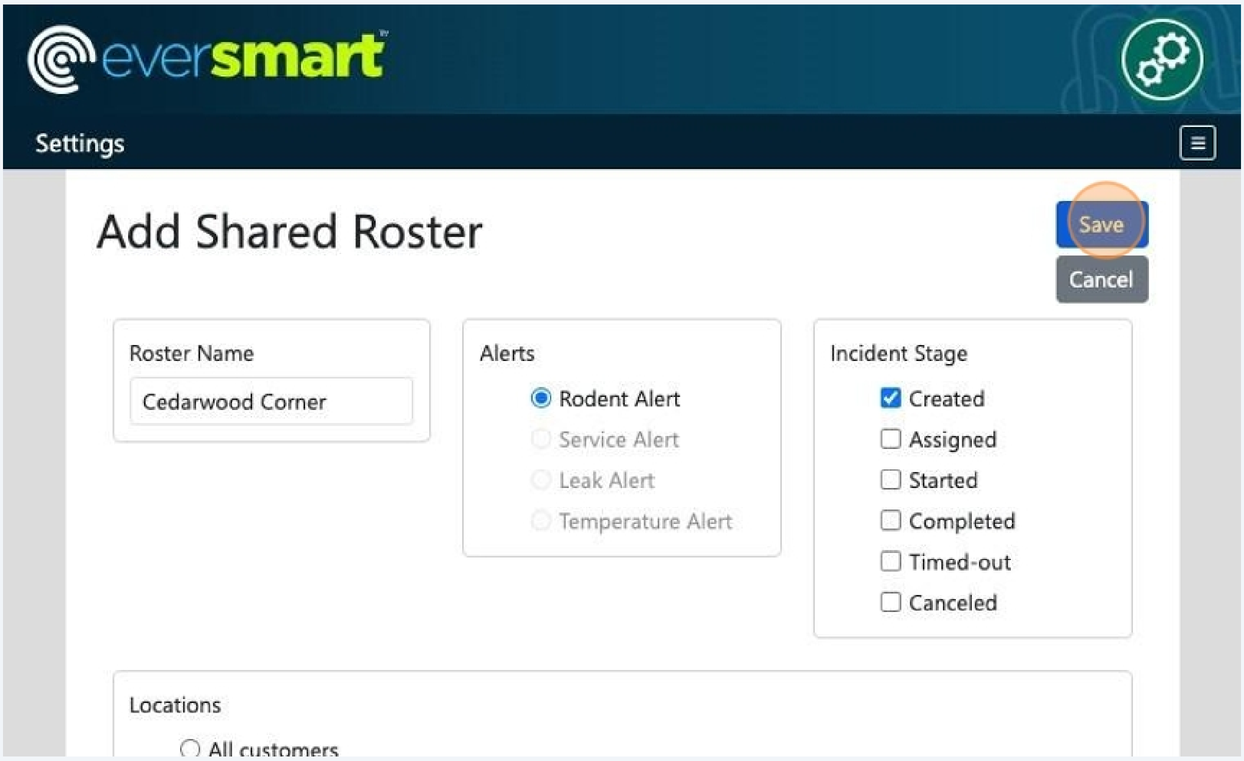
When a shared roster is added, users can link to it via the Add Rule page.

Any changes to a shared roster will be applied to users who have previously linked to the roster. When a shared roster is deleted, then it will no longer appear for users who linked to that roster.

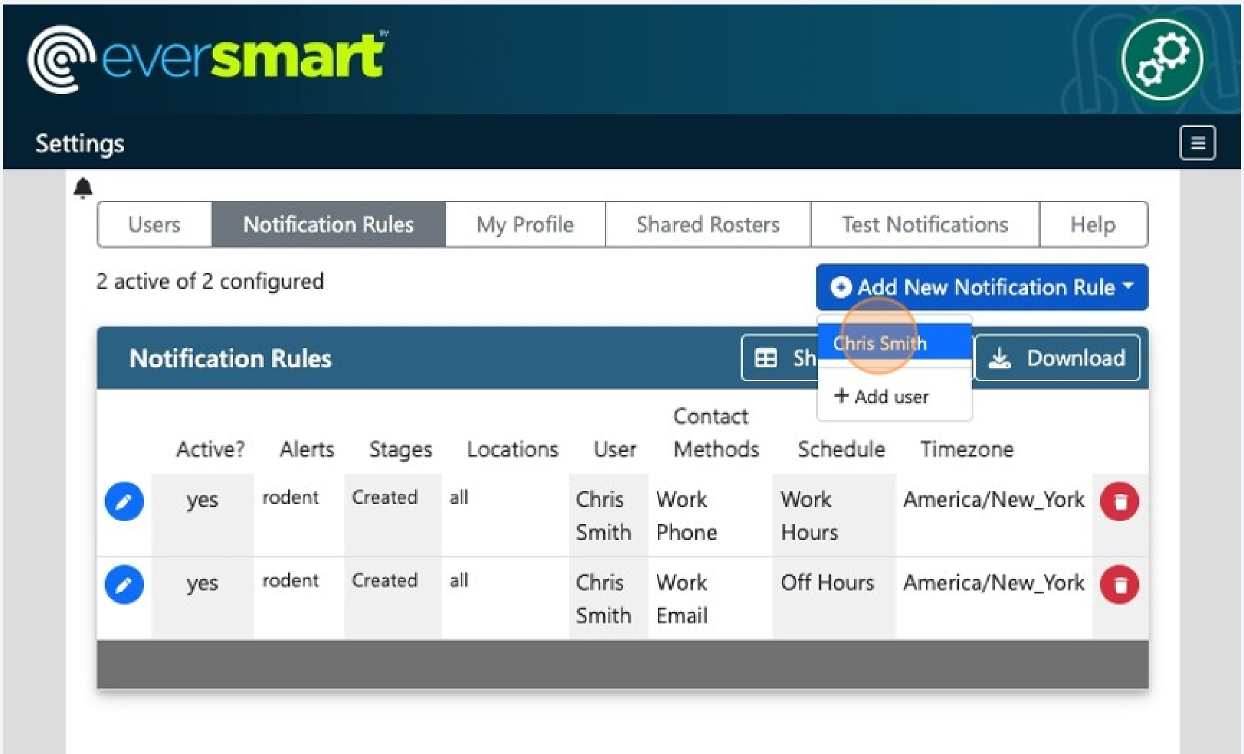
20 Enter a name for the shared roster, then select the locations for the roster



21 IMPORTANT - Click "Save" to add the new shared roster



22 To link a user to the new shared roster, return to the Notification Rules page, then click "Add New Notification Rule" and select the desired user



23 Check the "Link to shared roster" checkbox, then pick which roster to link to.

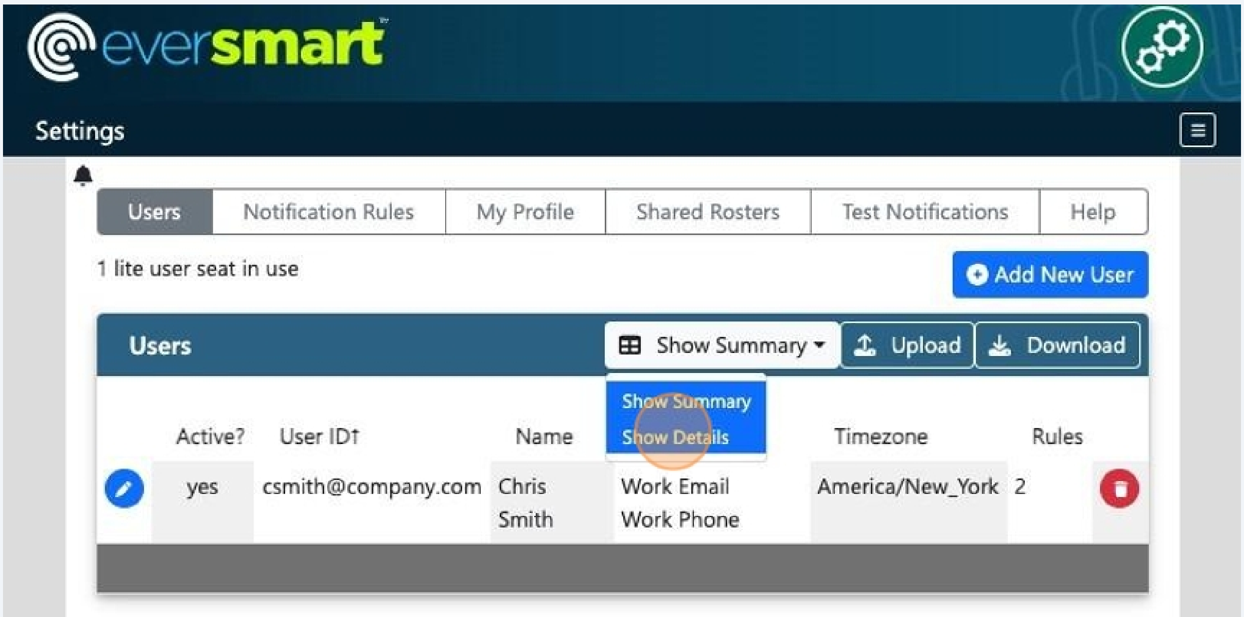
When the user links to a shared roster, they can set up their own contact methods and schedule, but the other settings (especially the locations!) will come from the shared roster

Don't forget to click the "Save" button!

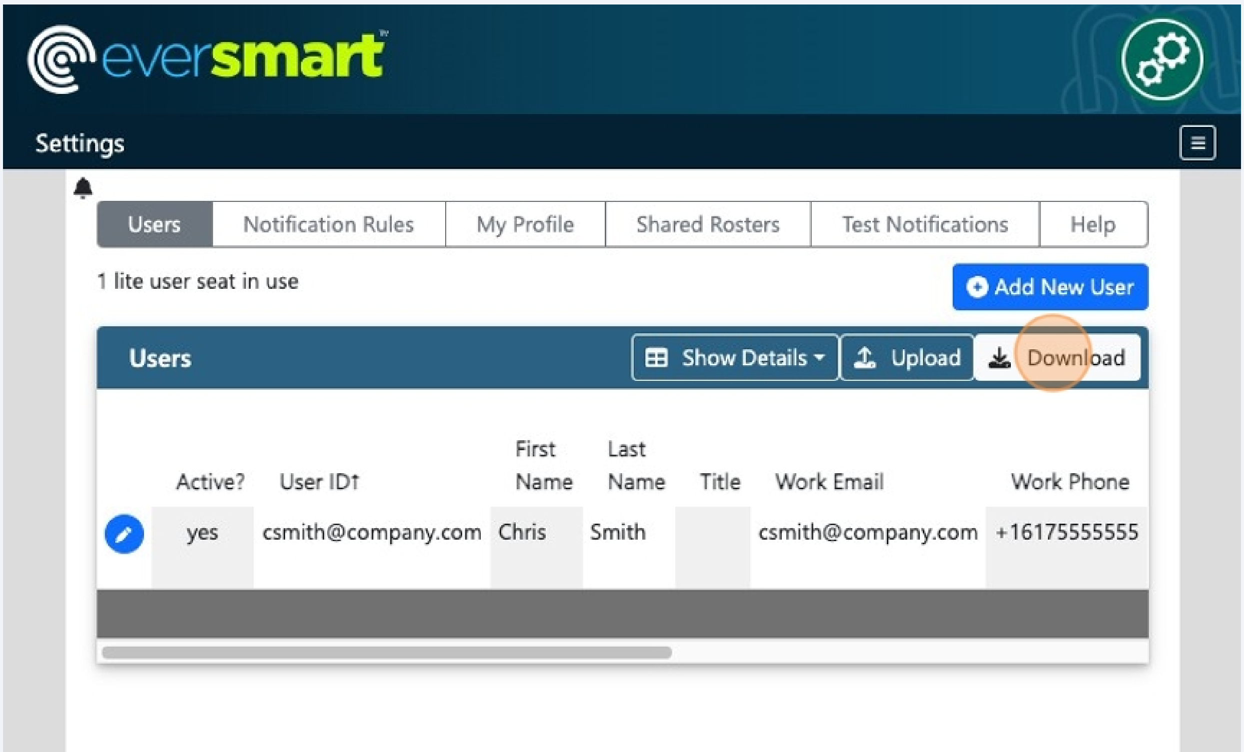
24 If you have a large number of users, continue reading to learn how to "Upload" all users in a single step

25 The first step is to create an example CSV file that will show you the correct format for the upload file.

Go to the Users tab, then click the "Show Summary" button and pick "Show Details"



26 Click "Download"



27 Open the example csv file using the spreadsheet editor of your choice.

Now create your own spreadsheet with your list of users using the same column names. When you are done creating your spreadsheet, export it to a csv file.

IMPORTANT - you must export with the header row or the app will not be able to upload the users correctly

The only rules that will be created by the Upload are rules linked to shared rosters. For this reason, we recommend using shared rosters in conjunction with the Upload feature.

The order of the columns is not important.

The "User ID" column is required and must contain a valid email address.

Any text within the "Links" column must be a comma or newline delimitted list of existing shared roster names. The shared roster names must use exact spelling and casing. Any discrepancies will not allow the user to be added.

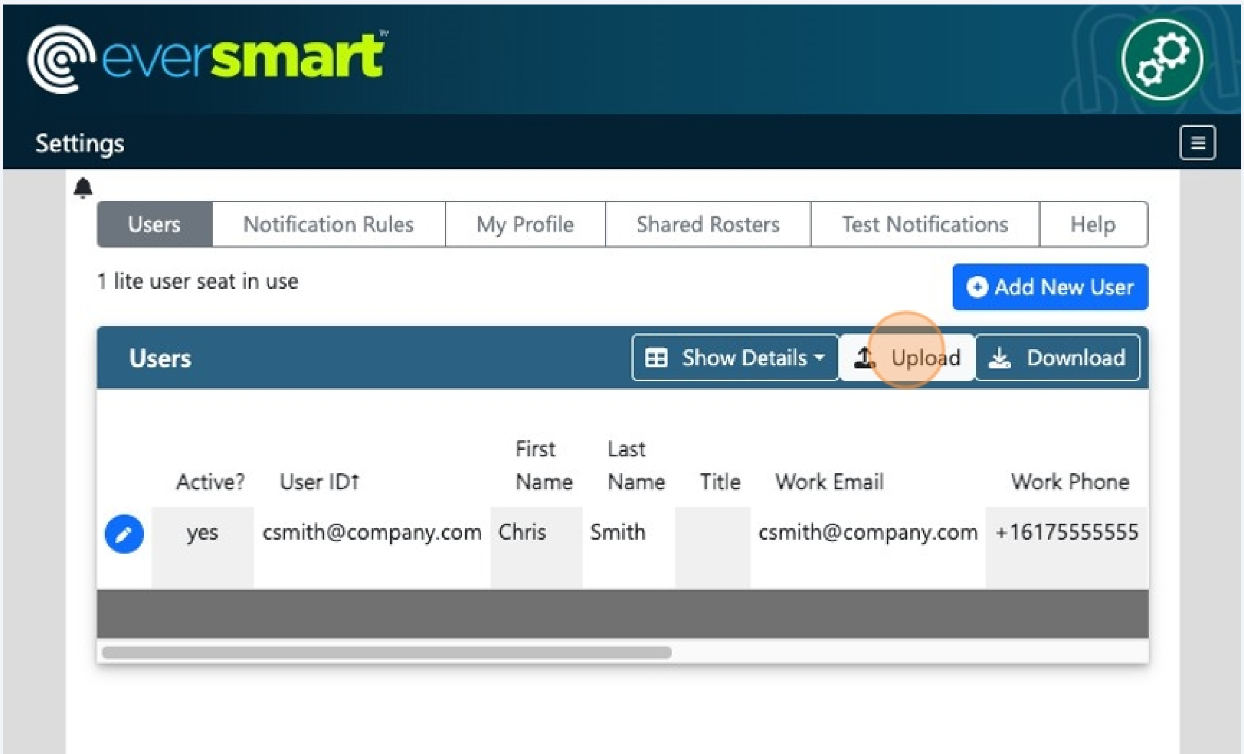
If the timezone is not supplied, the timezone of the browser will be used instead.

If the "Work Email" is not supplied, the "User ID" will be used for the work email instead.

All other columns are optional.

If a user already exists, then the existing user will be updated with the settings from the uploaded file.

28 When you are ready to upload the users csv, click the "Upload" button.



29 You will be prompted to approve the changes before they are saved to the server.