

CORES® Quick Reference Guide

User Management

Overview

User management in CORES RMS includes registering accounts, updating profiles, resetting passwords, transferring organization memberships, creating groups, and taking photos. These seemingly common tasks are important because they determine who has access to CORES and what information they receive.

The term *users* identifies the basic role assigned to individuals that have a CORES account. In your solution, users may be called responders, volunteers, or recipients, and the **User** and **User Search** tabs may be labeled differently than presented in this reference guide.

User Accounts

On user profiles, under **Account Settings**, every user has one of the following account statuses that indicate account access and whether they will be contacted with new alerts.

- **Active** – Users can log in, manage their profile, be members of organizations and groups, and receive health alert messages.
- **Inactive** – Users do not appear in search results and cannot be contacted by administrators. They do not receive health alert messages; but, may receive messages about the status of their account.
- **Closed** – Users cannot log in and do not receive notifications. Administrators can re-open closed accounts.
- **Archived** – The account is no longer used. Administrators cannot re-open archived accounts.

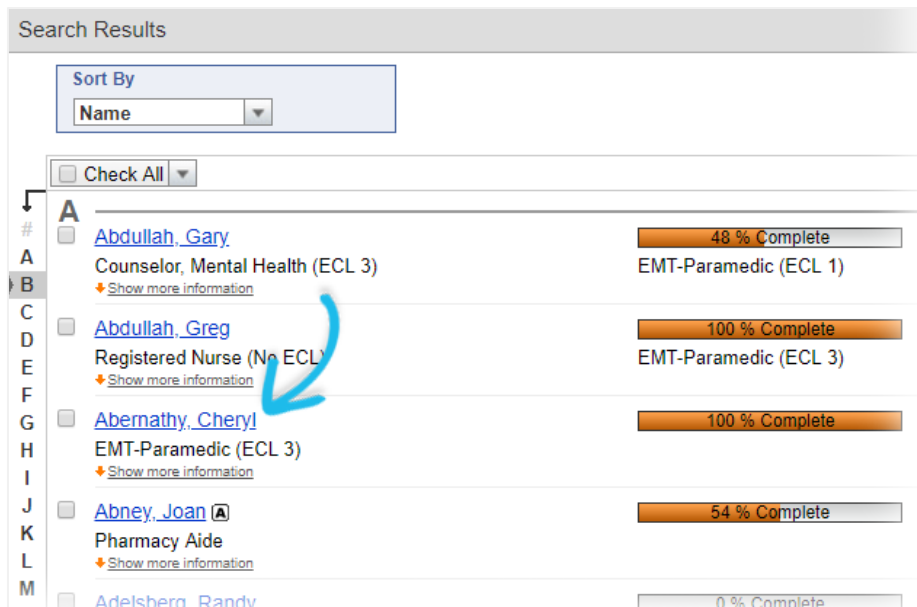
To Register a User Account

1. Click the **Administration** tab, and then click **Accounts**. The *Register User* page opens.
2. Enter the required information.
3. Click **Save** or, to immediately register another user, click **Save & Register Another**.

To Search for and Open a User's Profile

1. Click the **Users** tab, and then click **User Search**. The *User Search* page opens.
2. Enter the search criteria and click **Search**. The *Results* page opens.

3. Locate the user and click their name. The user's profile *Summary* opens in a new window.



Search Results

Sort By
Name

Check All

#	Name	Completion
A	Abdullah, Gary Counselor, Mental Health (ECL 3) EMT-Paramedic (ECL 1)	48 % Complete
B	Abdullah, Greg Registered Nurse (No ECL) EMT-Paramedic (ECL 3)	100 % Complete
C	Abernathy, Cheryl EMT-Paramedic (ECL 3)	100 % Complete
D	Abney, Joan Pharmacy Aide	54 % Complete
E	Adelsberg, Randy	0 % Complete

To Reset a User's Password

Password specifications are listed on the *Account Settings* page. When entering a new password, specific requirements are checked off as the criteria are met.

1. On the user's profile, click **Account Settings**. The *Account Settings* page opens.
2. In **New Password**, enter a password that meets the specified criteria.



Reset Password

* New Password:

* Retype New Password:

× Password must be 6 characters or longer
 × Password must contain a number
 × Password must contain a letter
 × Confirmation password must match

Change

3. In **Retype New Password**, enter the password again to confirm it.
4. Click **Change**. The user receives an email with their new password.

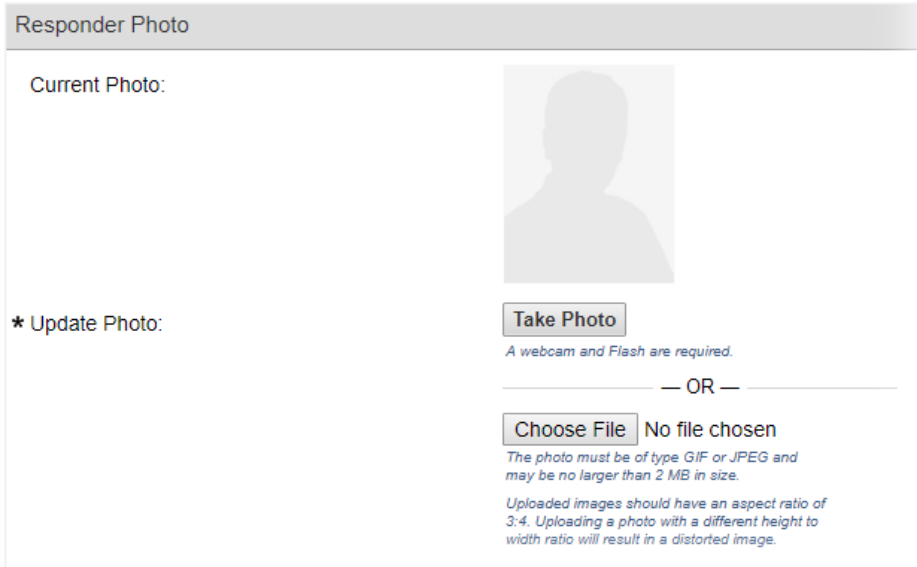
To Take a User's Photo

Before taking a photo, make sure your camera is connected and you have Adobe Flash® Player installed on your computer. Alternatively, use your laptop's camera or upload an existing image.

Note: The recommended aspect ratio for images is 3:4. Images with different dimensions are automatically resized, and this may cause some distortion.

1. On the user's profile, click **Account Settings**. The *Account Settings* page opens.
2. In the *Responder Photo* section, click **Take Photo**. The *Photos* page opens.
3. If prompted by the browser, follow the instructions to enable Adobe Flash Player.

4. Make sure the camera is positioned in front of the user and click **Take Picture**. The photo is automatically uploaded to the account.



Responder Photo

Current Photo:

* Update Photo:

Take Photo
A webcam and Flash are required.

— OR —

Choose File No file chosen
*The photo must be of type GIF or JPEG and may be no larger than 2 MB in size.
Uploaded images should have an aspect ratio of 3:4. Uploading a photo with a different height to width ratio will result in a distorted image.*

To Upload an Existing User Photo

Image uploads must be in JPEG or GIF format, and under 2097152 bytes in size.

1. Go to the user's profile and click **Account Settings**.
2. Locate the *User Photo* section and click **Browse** or **Choose File**. The browser file explorer opens.
3. Locate the file, select it, and click **Open**.
4. In the *User Photo* section, click **Upload**. The photo is uploaded.

Organization Membership

Users have memberships with organizations that identify them as qualified affiliates.

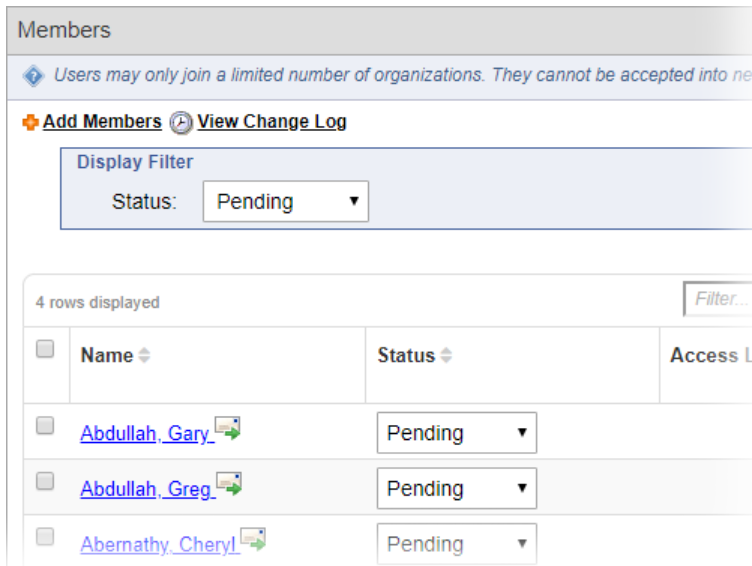
Organizations are official agencies and groups, such as departments, community centers, and healthcare facilities, that might contact users to request their services.

Users can belong as members of multiple organizations; their membership in every organization has one of the following statuses.

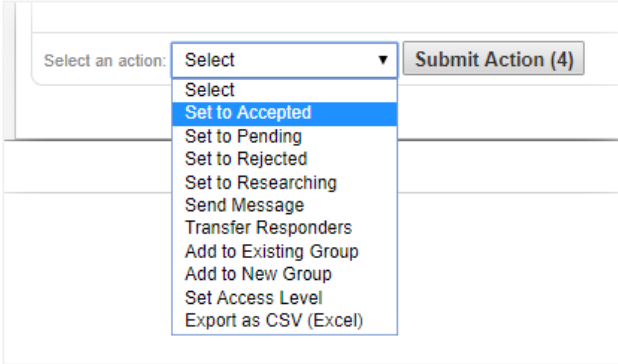
- **Accepted** – Approved member of the organization.
- **Pending** – User has not yet been accepted or rejected.
- **Rejected** – User has been denied membership in the organization.
- **Researching** – A process is in motion to determine whether the user can be accepted into the organization.

To Approve User Membership

1. Click the **Organizations** tab, and then click **All Organizations**. The *All Organizations* page opens.
2. Locate the organization, and to the right of its name, click **Dashboard**. The organization's dashboard page opens.
3. On the sidebar, click **Members**. The *Members* page opens.



4. In the **Status** list, click **Pending**.
5. To update users' membership status, take one of these actions.

If you want to...	Then...
Update the membership status for a single user,	In the user's Status list, click the appropriate status.
Update the membership status for multiple users,	<ol style="list-style-type: none"> a. Select the check box for each user. b. In the Select an action menu, click Set to Accepted. c. Click Submit Action. 

To Transfer User Membership

You may need to transfer a user's membership from one organization to another, for example, when a user's job, role, or responsibility is transferred from one department to another.

1. Click the **Organizations** tab, and then click **All Organizations**. The *All Organizations* page opens.
2. Locate the organization, and to the right of its name, click **Dashboard**. The organization's dashboard page opens.
3. On the sidebar, click **Members**. The *Members* page opens.
4. Select the check box for one or more users you want to transfer to an organization.
5. In the **Select an action** menu, click **Transfer Users**.
6. Click **Submit Action**. The *Organization Selection* window opens.
7. Select the check box for the organization to which you want to transfer the users.
8. Click **Transfer and Notify** or **Transfer**.
9. If you clicked **Transfer and Notify**, click **Notify Administrators** at the top of the page to send an internal message or email to the administrators of the organization that is receiving the transferred members.

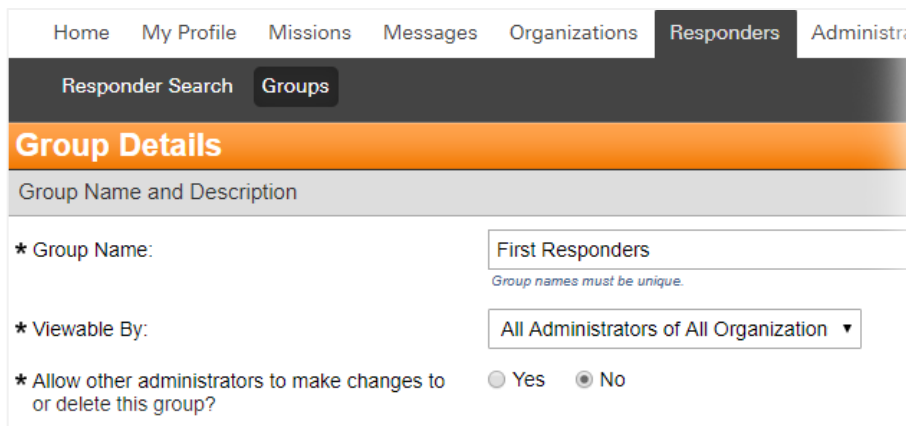
Group Membership

Groups are ad hoc collections of users that can be used as temporary work groups, or to help expedite the selection of users for receiving messages or exporting users.

You can add users to a group while creating it by defining group membership criteria (**Define Criteria**). Alternatively, you can manually add users after you save the new group (**Select Manually**). If you choose **Select Manually**, go to the procedure *To Add Users to an Existing Group* for details.

To Create a Group and Add Users

1. Click the **Users** tab, and then click **Groups**. The *Groups* page opens.
2. Click **Create Group**. The *Group Details* page opens.



Home My Profile Missions Messages Organizations Responders Administrators

Responder Search Groups

Group Details

Group Name and Description

* Group Name:
Group names must be unique.

* Viewable By: ▾

* Allow other administrators to make changes to or delete this group? Yes No

3. Enter the required information.
4. To add members, take one of these actions.

If you want to...	Then...
Define member criteria,	<ol style="list-style-type: none"> a. Click Define Criteria. b. Select and add one or more occupations, training courses, organizations, access levels, and/or system roles. c. Click Save Changes.
Manually select members,	<ol style="list-style-type: none"> a. Click Select Manually. b. Click Save Changes. c. In the <i>Group Details</i> page, click Add Users. The <i>Search Users</i> page opens. d. Enter search criteria and click Search. The <i>Select Users</i> page opens. e. Select the check box for each appropriate user. f. Click Add Users.

To Add Users to an Existing Group

1. Click the **Users** tab, and then click **Groups**. The *Groups* page opens.
2. Click the name of the group. The *Group Details* page opens.
3. Click **Add Users**. The *Search Users* page opens.
4. Enter the search criteria and click **Search**. The *Select Users* page opens.
5. Select the check box for each user you want to add to the group.
6. Click **Add Users**.

To Add Users to an Existing Group by Defining Criteria

1. Click the **Users** tab, and then click **Groups**. The *Groups* page opens.
2. Click the name of the group. The *Group Details* page opens.
3. Click **Edit Information**.
4. Add or select the occupations, training courses, organizations, access levels, and/or system roles for users you want included in the group.
5. Click **Save Changes**.

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