EMResource® Quick Reference Guide

Create and Manage Sub-Resources

Overview

A resource can own sub-resources, which can range from equipment to contact information. Sub-resources are also designed to report statuses. This two-level hierarchy allows both the facility or agency and an item it owns or service it provides to report statuses appropriate to its level.
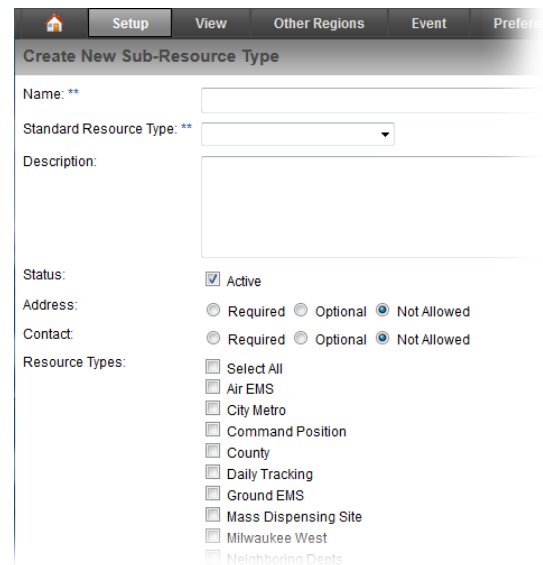
Workflow

Creating and managing sub-resources is a multi-step process, as outlined in this document. Begin by creating the appropriate sub-resource type. Note that you can use status types you have available or create status types that are specifically for sub-resources. This quick reference guide does not cover how to create status types.

Once you have sub-resource types and status types, you can create the sub-resource and make certain it is added to the owning resource's details view.

In addition, the primary sub-resource of any resource type can be included in regional views.

To Create a Sub-Resource Type

1. In the **Setup** menu, click **Resource Types**.
2. Click Create New Sub-Resource Type.
3. For **Name**, enter the name of the type.
4. From **Standard Resource Types**, select the appropriate option.
5. If appropriate, for **Description**, describe the sub-resource type.
6. Verify that the **Active** check box is selected.
7. For **Address**, indicate whether it is required, optional, or not allowed.
8. For **Contact**, indicate whether the information is required, optional, or not allowed.
9. In the *Resource Types* section, select one or more types to associate with this sub-resource type.
10. If appropriate, for **Default Status Type**, select an option to be used as the default status type when appropriate.
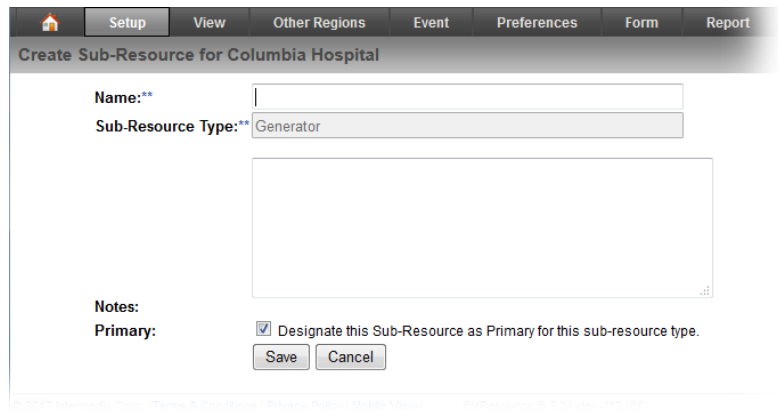
To Create a Sub-Resource Type (continued)

11. In the *Status Types* section, select the status types to associate with this sub-resource type.
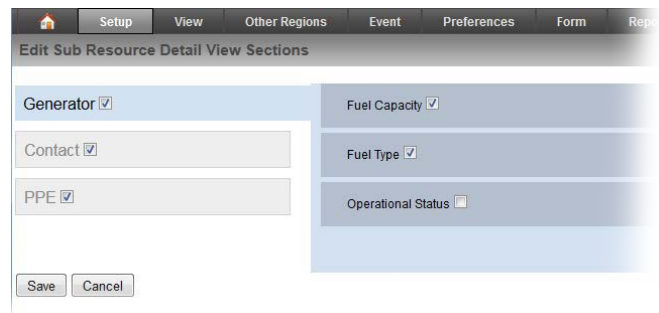
12. Click **Save**.

To Create a Sub-Resource

1. In the **Setup** menu, select **Resources**.

2. Locate the resource you want to add sub-resources to and click its **Sub-Resources** link.

3. Click the add button for the appropriate sub-resource type.

4. For **Name**, enter the sub-resource's name.

5. If appropriate, enter the address and contact information for the sub-resource.

6. For **Notes**, enter any additional information about the sub-resource.

7. If this is to be the primary sub-resource of this type, select the **Primary** check box.

8. Click **Save**.

To Add the Sub-Resource to the Detail View

If the sub-resource type is new, you must add it to the *Detail View* for sub-resources of that type to be available from the view.

1. In the **View** menu, select the appropriate view.

2. Locate the resource to which the sub-resource belongs and click the resource's name. The *Detail View* page opens.

3. In the upper right corner, click **customize**.

4. On the Edit Resource Detail View Sections page, click **Sub-resources**.

5. Select the check box next to the new sub- resource type.

6. Click the sub-resource type's name.

7. On the right, select the status types to include in the *Detail View*.
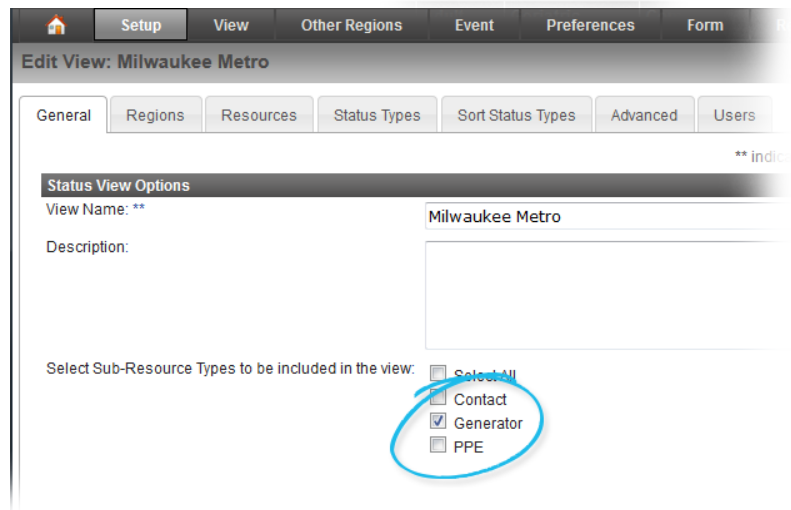
8. Click **Save**.

To Add the Primary Sub-Resource to a View

You can stipulate that the primary sub-resource of any given type is shown in a view. For example, you can set up a view to show a hospital (resource) and its primary generator (sub-resource) and its statuses.

1. In the **Setup** menu, select **Views**.

2. Locate the appropriate view and click its **Edit** link.

3. For **Select Sub-Resource Types to be included in the view**, select the check box for the sub-resource type you want to add.

4. Click the **Resources** tab.

5. Make sure the appropriate resources are selected.

6. Click the **Status Types** tab.

7. Locate and select one or more status types associated with the sub-resource type you are adding to the view.

8. Click **Save**.

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