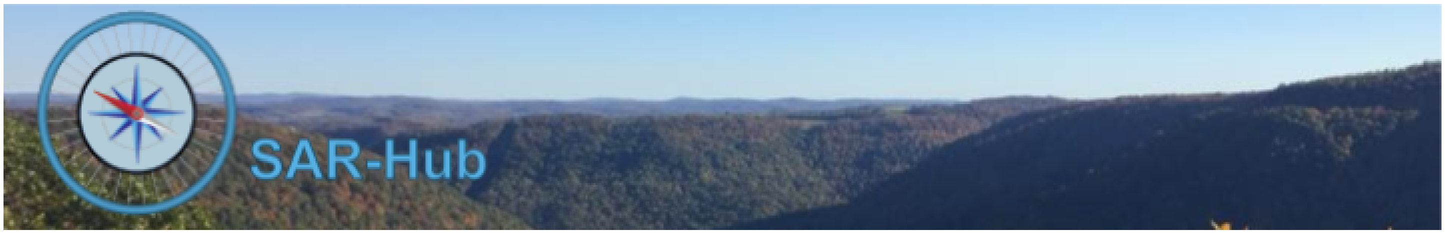


Setting up an Agency

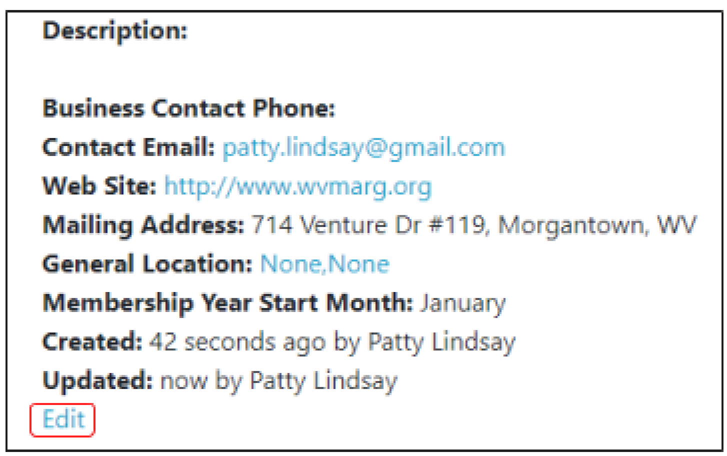
Request that the agency be created in SAR-Hub.

Email contact@sar-hub.com with the following:

1. Your Name
2. Your Email address(es).. Ideally one email address should be associated with a Google or a Microsoft account. (I'm working to get Facebook logins working, but Facebook has put a hold on verification of individual Facebook developers during COVID19.)
3. Name of your SAR Agency
4. Nickname, abbreviation or acronym
5. Website or social media page for your agency
6. Location or Address of the Agency, or central location of a response area.

Once you are notified that the agency has been created: See the SAR-Hub Basics document for help on logging in and then navigating to the Agency Detail pages. This and other documents are available on the https://www.sar-hub.com/about page. When logging in, use an account that has email address you supplied above.

On the Agency Detail page, click "Edit" to add details for your agency

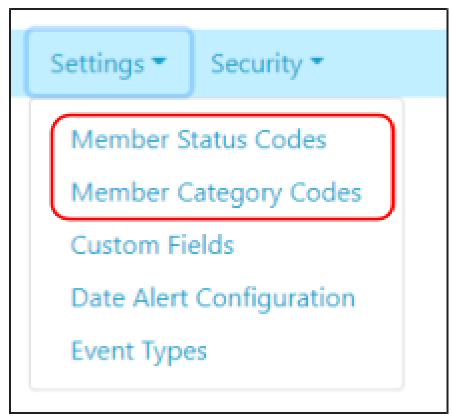


Member fields:

SAR-Hub provides for “standard” and “custom” member fields. The data for both custom and standard fields can be imported from a spreadsheet. The following are the “standard” roster fields:

1. Last Name 2. First Name 3. Email Address(es) 4. Member Status. Default values are “Active” and “Inactive”. You can add additional values as desired. 5. Member Category 6. Member Id 7. Mobile Telephone 8. Home Telephone 9. Work Telephone 10. Other Telephone	11. Street 12. City 13. State 14. Zip 15. Emergency Contact Name 16. Emergency Contact Relationship 17. Emergency Contact Home Telephone 18. Emergency Contact Mobile Telephone 19. Emergency Contact Work Telephone 20. Emergency Contact Email 21. Emergency Contact Note

You can define the valid Member Status and Member Category values for your agency by clicking on the applicable items in the “Settings” dropdown menu on the Agency Detail page.



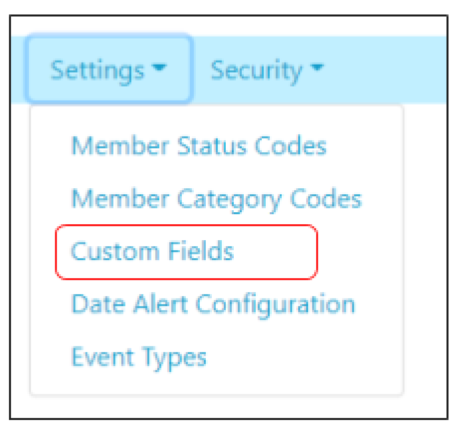
Next consider the custom fields.

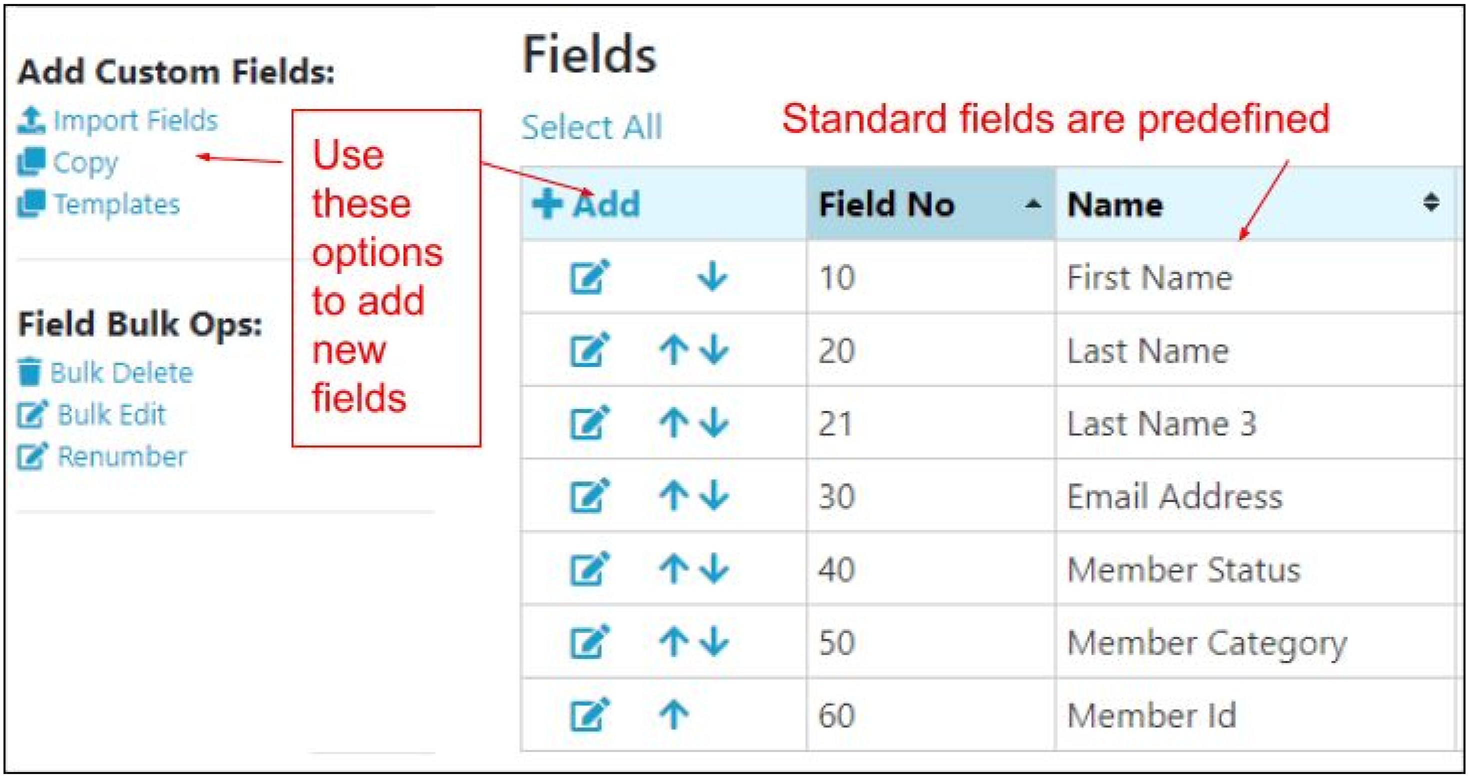
SAR-Hub provides some templates for custom fields or you can define your own, or use a combination. See Appendix A for a list of available templates.

- If you have a spreadsheet that contains your roster, and you are happy with the fields that you have established, you can import the field names and the data from the spreadsheet into SAR-Hub. You can also use the templates, and rename the spreadsheet columns to match the template names (or vice versa) before importing the data.

- Whether you are importing your field names from your spreadsheet, using templates, or defining your own, define the fields before you import the data.

To define your list of custom fields, click “Custom Fields” in the “Settings” dropdown menu on the Agency Detail page.
Note: See the [SAR-Hub Basics] document for help on the common editing wizards found on many pages.





The standard roster fields will already be included. You can add custom fields in the following ways:

- Click “Add” to manually add a field

- Click “Import Fields” to import fields from the column heads of a spreadsheet.
  - Open the spreadsheet in Excel, Google Sheets, etc and then save it as a “CSV” file.
  - The spreadsheet import process will read the column headers. The process will look at the data in the columns and attempt to determine the data type. For example, if all of the values are blank or a valid date, it will set the data type to “Date”.
  - Once they’ve imported, delete any fields you don’t want to include in your SAR-Hub roster.
  - **Delete any fields that will be mapped to the standard fields**

- Click “Copy” to copy the fields from another agency’s roster. (It copies just the field definitions, not the member data).

- Click “Templates” to get a menu of the predefined Templates. You can select as many as you like.

Tweak your field list as needed. Note that fields can be deleted or added later as needed.

Considerations for deciding which fields to include in the custom fields:

- Fields that will only be used to keep a historical record for an individual can be omitted from the roster custom fields and included in the individual's qualification history. Depending on your agency's needs, that might be the date IC-100 was completed, or the date the initial SARTECH-II was achieved, or a recertification date.

- If it's a date that you want a Date Alert to be sent when it approaches, e.g. the expiration date for SARTECH-II, then include it in the custom field list.

- Include any field you might want to run a report on, such as a list of members and their email addresses and what SARTECH level they have completed.

Field Types that are available:

- Text - Most fields will be a text field. Unless it fits another category, make the field a text field.

- Date - Although a date can be stored in a text field, it's best to make it a date field so that the contents can be sorted and compared appropriately.

- True or False - A field that only has two possible values, True or False. An example would be that a member either has taken ICS100 or has not.

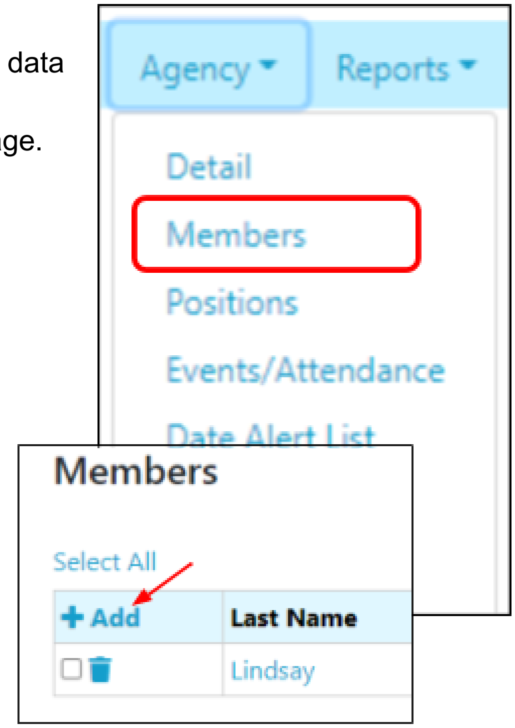
- Choice - If the values for the field are a defined list, and you want to make sure that a valid choice is made for each field, then a Choice field is a good choice. You define which values are valid, and when the field is updated a list to choose from is given. Note that if you define a field as a Choice field and import that field from a spreadsheet, the import process will automatically add any values found.

- Integer - Unless you plan to do calculations (such as sum or average) on a field, numeric fields can be stored as text fields.

- Decimal - A field that you want to do calculations on that contains a decimal point.

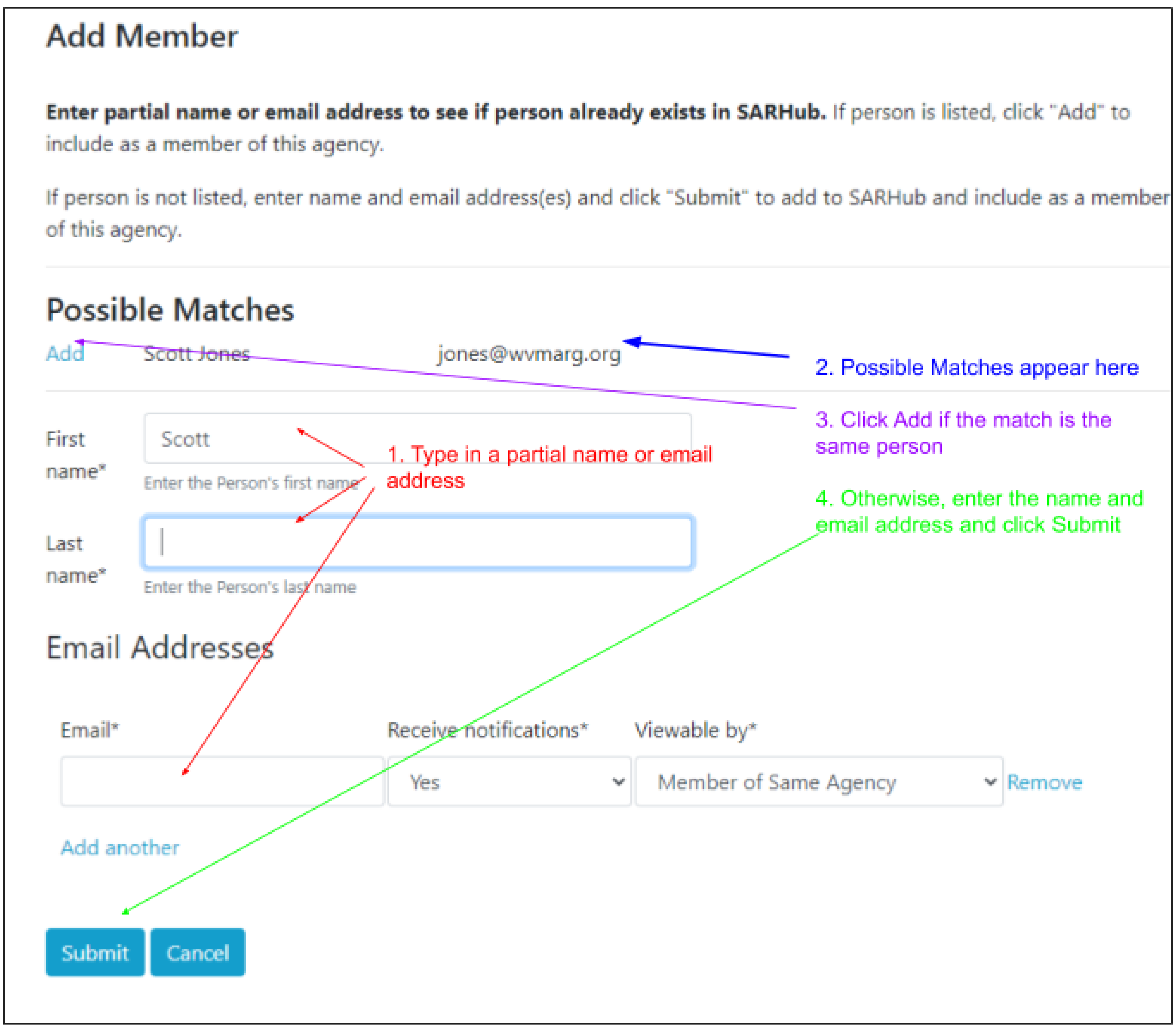
Adding Members:

Once you have defined the custom field list, you can either import the data from a spreadsheet or enter it through SAR-Hub. To do either, click "Members" in the "Agency" dropdown menu on your Agency Detail page.



Manually adding members: Click the "Add" button to add a member manually.

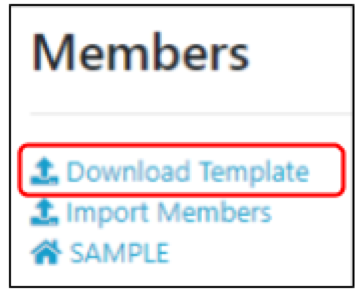
It's not uncommon for a person to be a member of multiple SAR agencies. To help prevent duplication of entries, as you add new members the Add Member page will help you determine whether the person already exists in SAR-Hub in another agency.



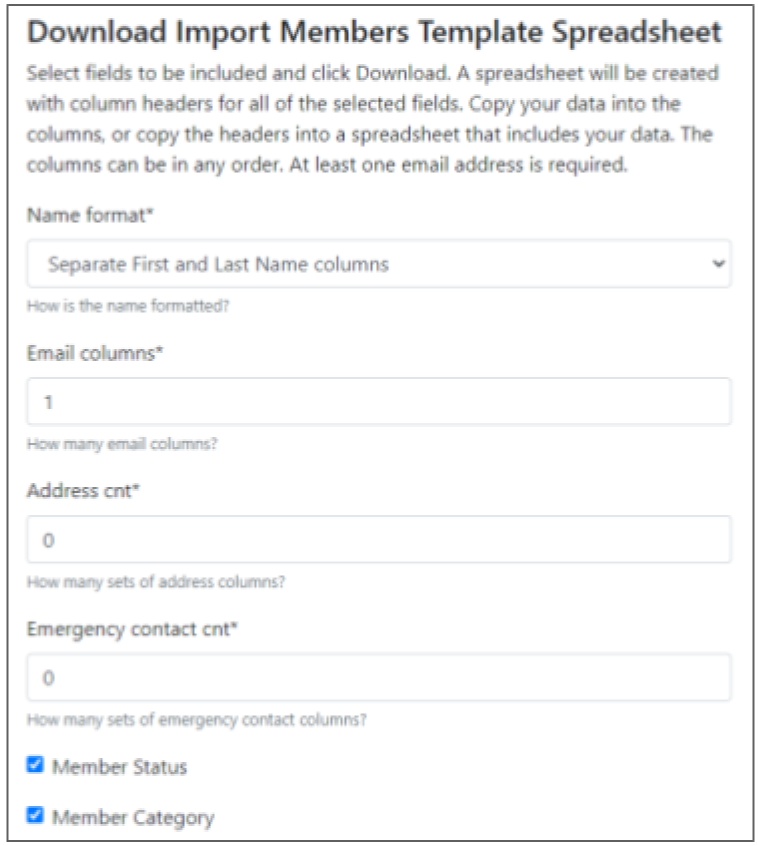
Importing members from a spreadsheet:

Preparation of Spreadsheet for Import:

- Click “Download Template” to create a sample spreadsheet for your import.



- Answer the questions about the name format, how many addresses (if any) and emergency contacts (if any) per member you plan to import and click Download to get a customized template.



- You can copy and paste the headers from the template into your spreadsheet, or copy the data from your spreadsheet into the template. The order of the columns is not important.

- The spreadsheet must contain the name and email address for the person. Individuals who do not have email addresses can be loaded manually. Additionally, a given email address must be associated with only one member. If members share an email address, remove it from the spreadsheet for all but one of the members.

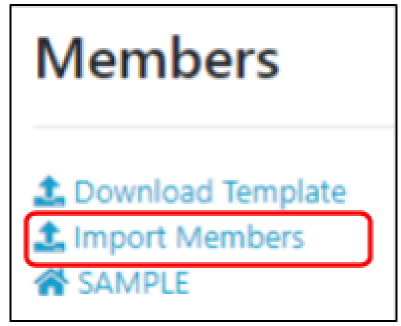
- The column headers in the spreadsheet will be matched with the custom field names. Any columns that do not match, will not be imported to custom fields.

- There is also an option to select which columns should be imported to the member’s Qualification History. Columns can be imported both to a custom field and to the Qualification History..

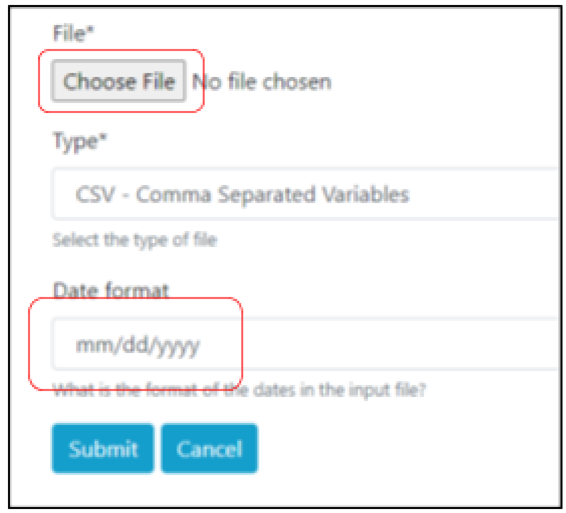
- Convert the spreadsheet to a “CSV” file if it is another format. (Open the spreadsheet in Excel, Google Sheets, etc and then save it as a “CSV” file.)

Initial Import of Members from a spreadsheet:

- Click “Import Members” (can be found in the left bar of the Members page)

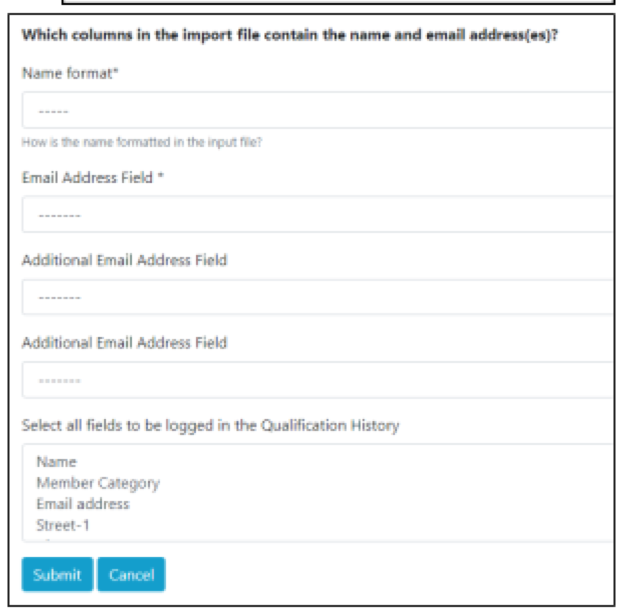


- Select the CSV file saved above.
- Choose the format used for dates in the spreadsheet (if any).
- Click Submit.



- Select:
  - The appropriate name format
  - The name columns
  - The Email Address columns
  - All fields to be logged to the Qualification History. (To select multiple fields, click each field while holding the CTRL or Command button down.)

- Click “Submit”

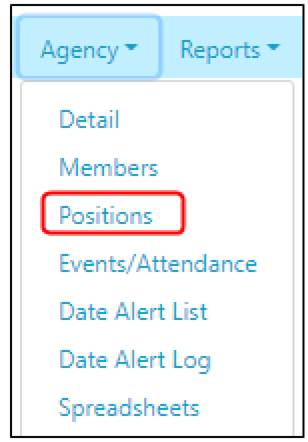


Import of Additional Data from a spreadsheet:

You can repeat the import either form the same spreadsheet, or another spreadsheet. You might decide to add data from additional columns, or have data for your members stored in another spreadsheet. Any existing data for the same fields will be overwritten. If you don’t want to overwrite the data, remove those columns from the spreadsheet. Once the members have been created in SAR-Hub, it is not necessary to include the email address with subsequent imports. If an email address is not present, the names for the new data will be matched against the names already in SAR-Hub for your agency. Any rows where the names don’t match, will be rejected.

Defining Agency Positions:

You can define agency positions and assign members to each position. These positions will display on the Agency Detail page along with any contact information (email addresses and telephone numbers) that the viewer meets the criteria for as specified by the member incumbent in the position.   If the member has designated “viewable by Member of Same Agency” for a particular email address or telephone number, only members of your agency will be able to see the contact information. If the member has designated “viewable by Member of Any Agency”, then members of other agencies can see that particular email address or telephone number.



To add, edit or delete positions click “Positions” in the “Agency” dropdown menu on your Agency Detail page.

A sample position list page. Note that Term Start Date, End Date and Count are intended to be used internally by the Agency to keep track of the positions. They will not appear on the Agency Detail page so will not be seen outside of the agency.

Agency: Sample Agency

Positions

Add	Seq No	Position	Last Name	First Name	Term Start Date	Term End Date	Term Count
	10	President	Admin	Minnie	None	None	None
	20	Chief	Doe	Jane	None	None	None

A sample as shown on the Agency Detail page.

Agency Positions

Position	Name	Email	Phone
President	Minnie Admin	wvmarg1@wvmarg.org	555-123-4689(m), 555-123-4567(w)
Chief	Jane Doe	wvmarg2@wvmarg.org	555-323-4689(m)

Appendix A - Custom Field Templates

You can add the fields in the templates to your custom field list, Click “Custom Fields” on your Agency Detail page, and then “Templates” in the left menu bar.

Templates can be used in combination, select as many as you like. If you don’t want all of the fields in a particular template, you can delete them. You can also rename the fields, adjust the valid values list and alter the Date Alerts.

Roster Template: Membership Date Joined Membership Valid Thru Date Background Check Date Position(s) Held **Roster Template: Appalachian Search and Rescue Conference** Primary ASRC Team ASRC Field Level (values of Field4, Field3, Field2, Field1) ASRC Field Expiration Date (with DateAlert) ASRC Search Manager Level (values of SM4, SM3, SM2, SM1) ASRC Search Manager Expiration Date (with DateAlert) ASRC Join Year (Adjusted) **Roster Template: Pennsylvania DCNR** PA DCNR Field Level (values of FTM, FTL) PA DCNR Field Expiration Date	**Roster Template: ICS, First Aid, CPR** CPR AED Expiration Date (with DateAlert) First Aid Expiration Date (with DateAlert) Wilderness First Aid Expiration Date (with DateAlert) IS-100 IS-200 IS-700 IS-800 ICS-300 ICS-400 **Roster Template: SARTECH** SARTECH Level (values of SARTECH-III, SARTECH-II, SARTECH-I) SARTECH Expiration Date (with DateAlert)

Note: if you have a set of fields you think would make a worthwhile template, or suggestions for improvement to the above, please let Patty know.