EDGEauditor

User Guide: Creating & Managing Non-Incident Reports

Last Updated: September 10, 2021

Table of Contents

Overview

Welcome to EDGEauditor!

EDGEauditor helps resorts remove their reliance on paper-based forms, waivers and more by transitioning all of these pertinent documents into digital form. Whether you're a small family-operated resort or an operation with thousands of employees, this digitized tool will improve efficiency and accuracy while decreasing administrative overhead and mitigating risk.

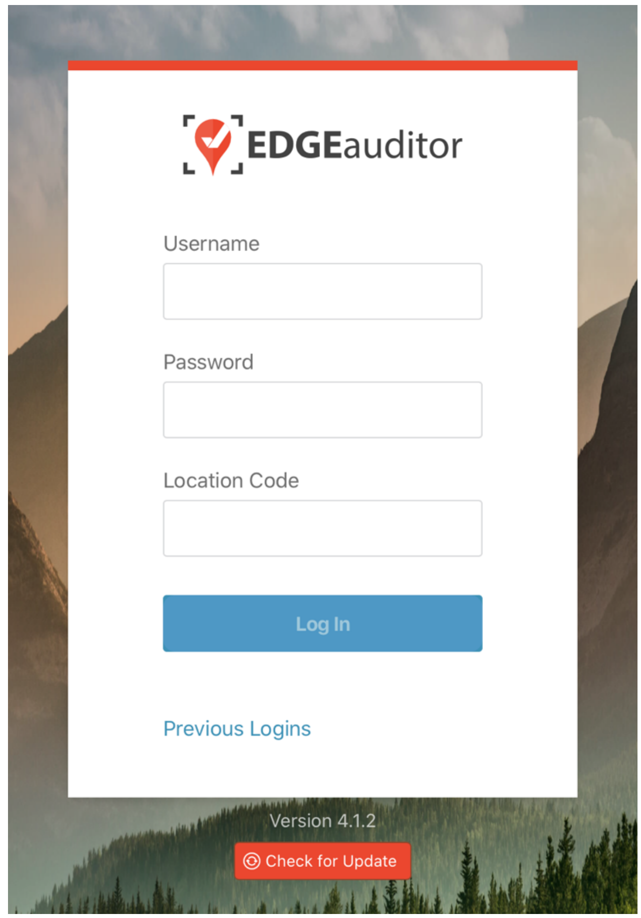
Some of the many benefits to using EDGEauditor are:

- Helping you maintain more consistent, complete and accurate reports with additional information that's just not possible with paper.
- Never having to deal with legacy versions of the software, or people using different versions. EDGEauditor is a SaaS (Software as a Service) solution so every update made to the software is automatically applied to every user.
- Desktop-based manager dashboard provides administrative users with a full 360-degree view of all reports, ability to approve or reject reports, add new sections or criteria to reports, export data and much more!
- Easily manage security and access permissions to each individual user so there's no need to worry about things going missing or being altered.
- Enable email and text alerts for incident reporting based on the criteria you set.
- Saving incident reports, daily logs, inspections and other reports locally on a tablet and then upload later when an internet connection is available.
- Through tablets and smartphones, your staff can start to catalog every piece of risk mitigation you have on your property.

Login

The login screen is a single point of entry into EDGEauditor. The EDGEauditor app is what frontline staff will use to complete and submit reports and is what we will review first. The EDGEauditor manager dashboard (reviewed later) is an online website where managers review and approve submitted reports.

Accessing the EDGEauditor App



Mobile Device:

1. Download the EDGEauditor app from download.edgeauditor.com. You'll want to choose one of the download options that appears directly beneath the EDGEauditor RESORT logo.
2. Launch the app and on the login screen, enter your username, password and location code (case sensitive).
3. Tap the *Log In* button to log into the EDGEauditor application.

IMPORTANT: If you are using an iOS device, before you can access the app for the first time you will need to go into *Settings > General > Profile (or Device Management) > CloudStorm Solutions > Trust "CloudStorm" > Trust*.

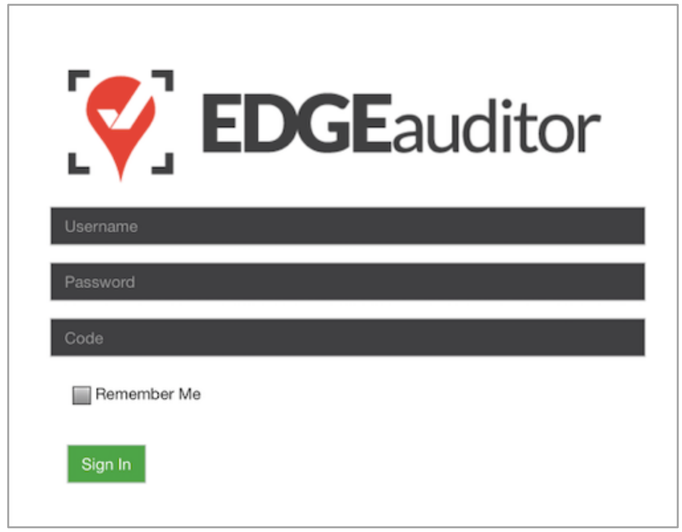
Desktop Computer:

1. Open Chrome browser and go to browser.edgeauditor.com.
2. On the login screen, enter your username, password and location code (case sensitive).
3. Click the 'Log In' button to log into the EDGEauditor application.

Accessing the EDGEauditor Manager Dashboard

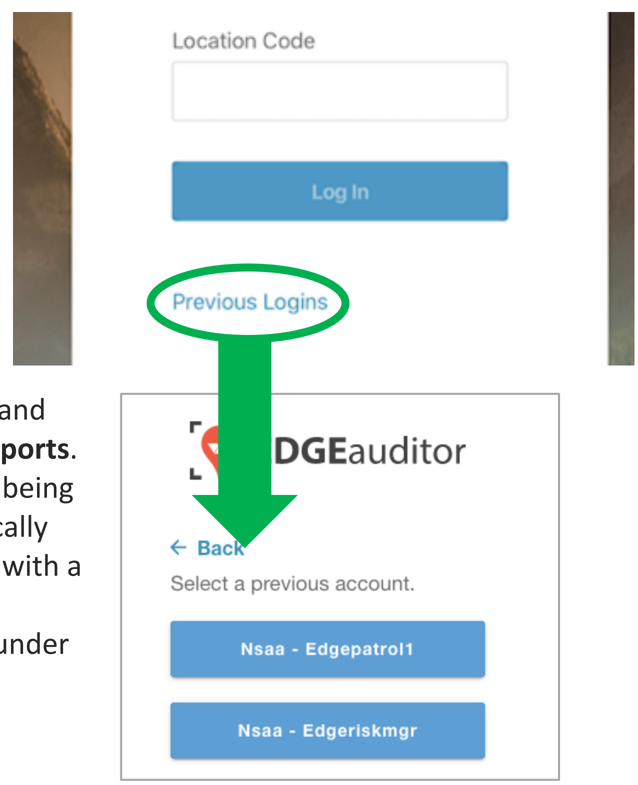
Desktop Computer:

1. Open Chrome browser and go to resort.edgeauditor.com.
2. On the login screen, enter your username, password and location code (case sensitive).
3. Click the *Sign In* button to log into the website.



Additional Notes

- Both the manager dashboard and the browser-based version of the app are optimized to work with Chrome browser.
- On the EDGEauditor app, if a previous login is saved it will be shown when you select *Previous Logins* located beneath the *Log In* button.
- You can then select the username and just add the password as a shortcut to login as that user. <u>A maximum of 2 previous logins can be saved. If logging in with a third user, it will clear the other logins.</u>
    - If either of those previous users have reports saved locally, the app will not be able to clear them until the user(s) logs in and clears the report(s) from **Pending Local Reports**. This login "failsafe" prevents reports from being accidentally deleted. If both users have locally saved reports you will not be able to login with a new user until one of the existing users submits/deletes the reports saved locally under their profile.



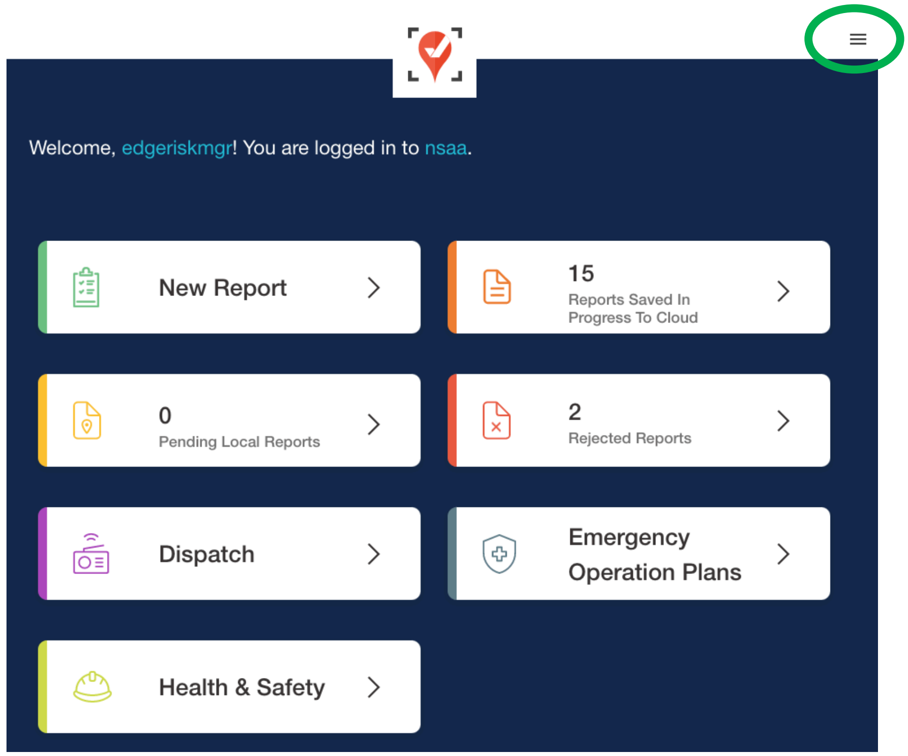
EDGEauditor

Getting Started

Upon successful login, you will be taken directly to the app home screen that shows each of the modules your user profile has access to. Access to specific modules are determined by the user permissions setup by your manager or those being used by your resort so you may not see all of these when logged in.

To access the settings for your account, select the menu icon located at the top right-hand corner of the main screen (circled in green on the image to the right). From settings you can:

- View your username and location.
- Log out of the app (be sure to do this every time you're finished using the app; this is a security feature to prevent unauthorized access to your account).
- Change your password – if your user profile allows for this (make sure you either memorize it or write it down and keep it in a safe place so you have it when needed).



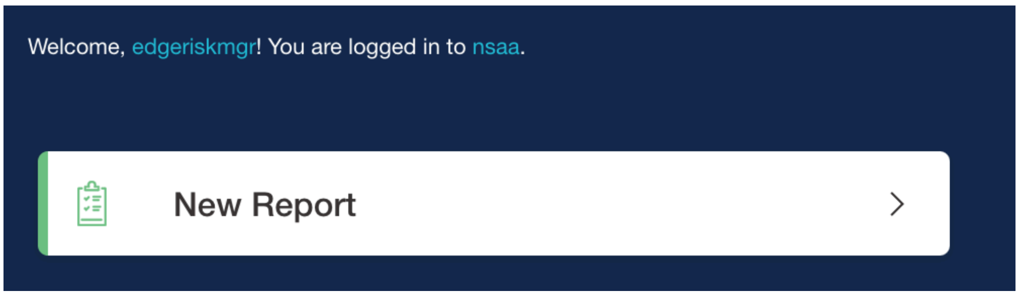
Online / Offline Mode

The mobile app version of EDGEauditor that can be used on a phone or tablet allows you to use certain features even without an internet or cellular connection. <u>The only modules that can be used in OFFLINE mode are **Reports** (incident report and other reports), **Emergency Operation Plans** and **Health & Safety**.</u> However, functionality may be limited (e.g., location mapping will not be available on the incident report). You will know whether your device is connected by the ONLINE / OFFLINE icon that appears in the top right-hand corner of most screens on the app. If your connection status changes, the icon will change to reflect this. Depending on the screen size of your device, you may just see the connected/disconnected icon.

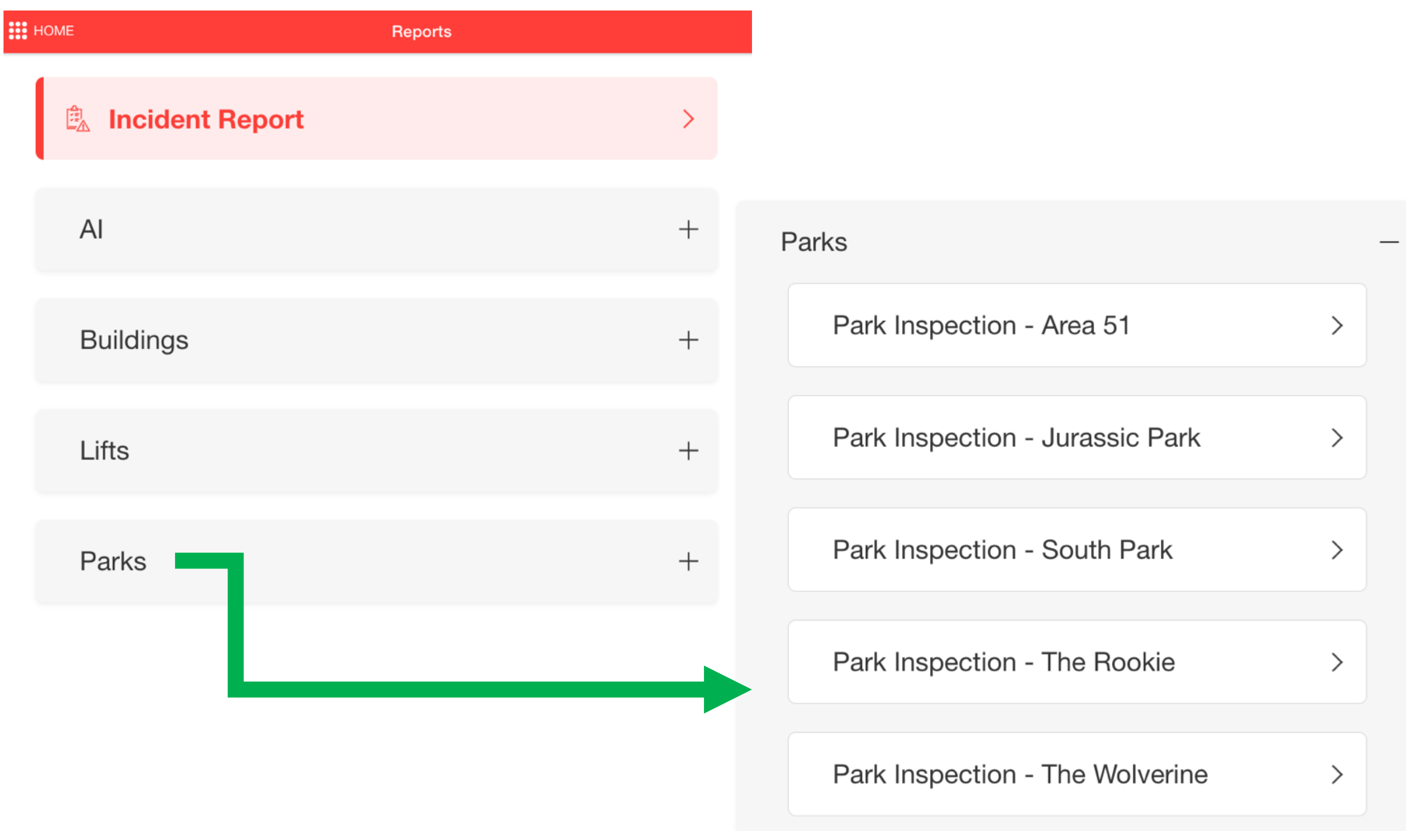
The **New Report** module is where you will likely spend the bulk of your time in the EDGEauditor app completing incident reports and other reports. Most, if not all, of the reports you see here should be familiar if you used the paper-based ones previously. This is because EDGEauditor has taken copies of all these reports and digitized them. For the purposes of this guide we are going to review non-incident reports.

Starting a New Report:

1. Select NEW REPORT from the app home screen.



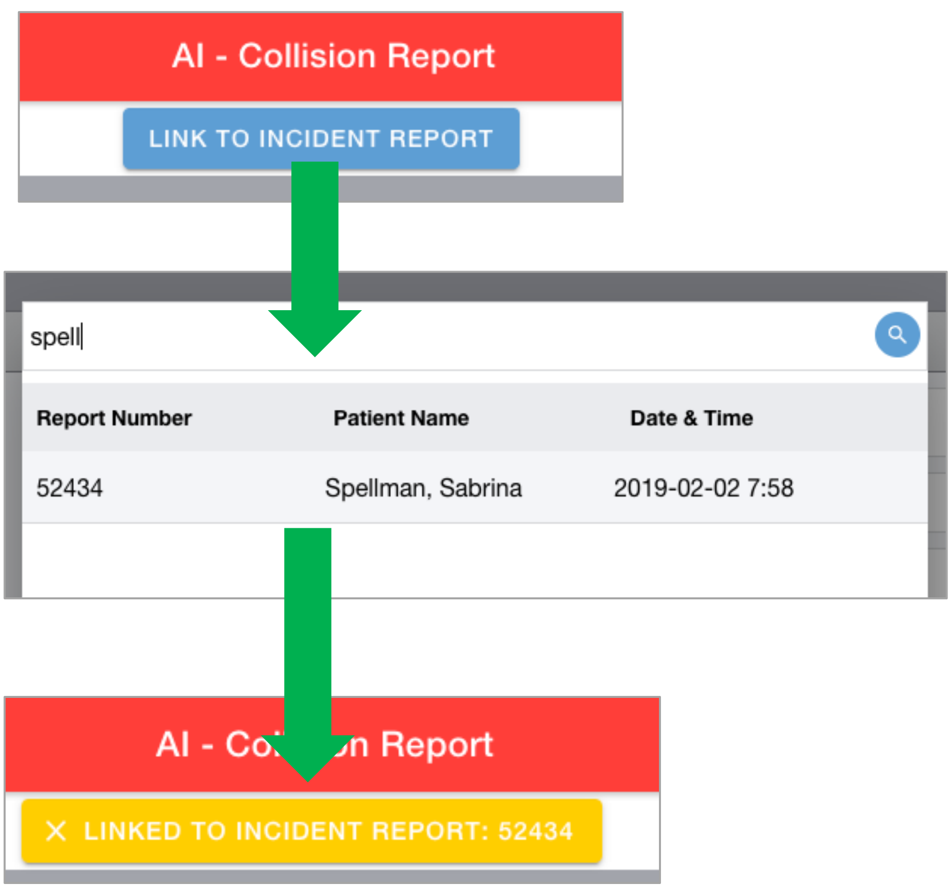
2. Find the report you are looking for from the list that appears and select it to open it. If the report is inside a folder you will see a "+". Simply select the folder name to expand the folder and reveal the reports belonging to it.



Non-Incident Reports – General Functionality & Question Types

Linking to an Incident Report

- If your report is able to be linked to an incident report you will see a blue *LINK TO INCIDENT REPORT* button located at the top of the screen just below the report name. Selecting this button will open up a dialog box where you can search by patient name (if incident occurred within the last 30 days) or incident report number in order to link it to the current report you are completing.
    - You can search by a partial match using patient first name or last name. If searching by incident # this needs to be an exact match.
    - Results will filter automatically after you have entered your search query.
    - Select the correct record from the search results to link it to the report. You will know the link has been completed as the button will change from blue to yellow at the top of the report and it will show the incident report number it is linked to.
    - To remove a linked report, simply select the yellow button. Select it a second time to go through the linking process again.
    - If you need to link a report to more than one incident report this can be done using the manager dashboard (explained later in this guide).

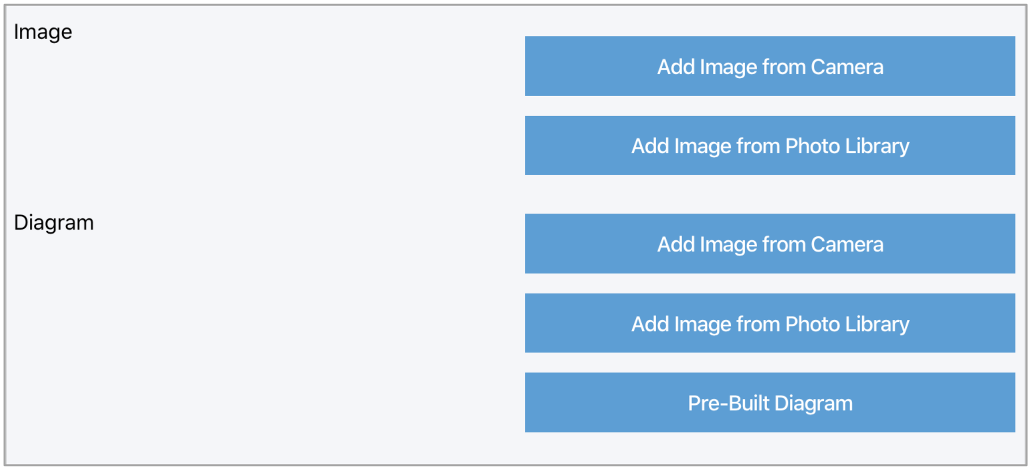


Question Types

The report you are completing can contain a variety of question types. The below table explains how each question type functions with corresponding screenshots from the app on pages 10 and 11 to show how these questions would display.

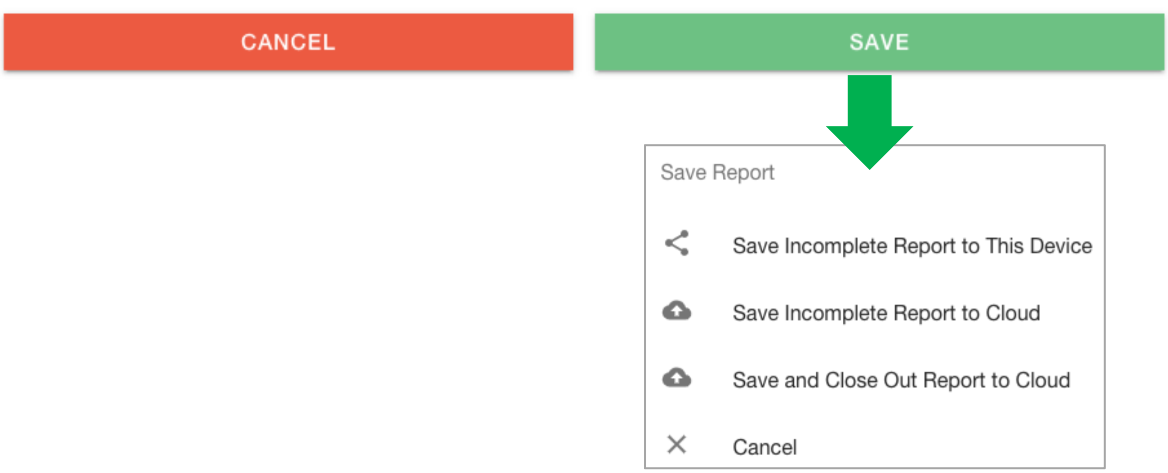
Question Type	Explanation
Date	Opens calendar picker to select the month, day and year.
Time	Opens time picker to select the hour and minutes (24-hr clock).
String	Can input up to 100 characters.
Text	No limit to the number of characters that can be entered.
Checkbox	Select the box in order to indicate if something is "YES" (e.g., correct signage in place).
Boolean	Allows you to "toggle" between two pre-defined values you specify (e.g., "open" or "closed").
Select	Displays drop-down list of pre-defined options to choose from. You can also type to filter results that will appear in the drop-drop. Choosing the "x" after a selection is made will remove it.
Number	Allow entry of numerical values only.
Signature	Allows you to add a digital signature. Selecting "Clear" will erase the signature so it can be added again.
Patroller	Creates a pre-defined drop down list of all staff who have a staff type of "Patroller" on https://resort.edgeauditor.com/staffs. Choosing the "x" after a selection is made will remove it.
Lift Operator	Creates a pre-defined drop down list of all staff who have a staff type of "Lift Operator" on https://resort.edgeauditor.com/staffs. You can also type to filter results that will appear in the drop-drop. Choosing the "x" after a selection is made will remove it.
Ski Instructor	Creates a pre-defined drop down list of all staff who have a staff type of "Ski Instructor" on https://resort.edgeauditor.com/staffs. You can also type to filter results that will appear in the drop-drop. Choosing the "x" after a selection is made will remove it.
Lift Maintenance Staff	Creates a pre-defined drop down list of all staff who have a staff type of "Lift Maintenance Staff" on https://resort.edgeauditor.com/staffs. You can also type to filter results that will appear in the drop-drop. Choosing the "x" after a selection is made will remove it.
Park Staff	Creates a pre-defined drop down list of all staff who have a staff type of "Park Staff" on https://resort.edgeauditor.com/staffs. You can also type to filter results that will appear in the drop-drop. Choosing the "x" after a selection is made will remove it.
Image	Allows you to upload a photo already saved to the device (browser, iOS and Android) or take a photo using the device (iOS and Android).
Diagram	There are 3 choices for which type of diagram to use: *Add Image from Camera, Add Image from Photo Library or Pre-Built* Diagram (allows you to use one of the pre-existing diagrams added to https://resort.edgeauditor.com/diagrams). On the browser-based version of EDGEauditor (browser.edgeauditor.com) there is only the ability to use *Pre-Built Diagram* or upload an image already saved on your computer. For more information on diagrams, please see the separate user guide created for this feature.

Date	2/10/2020
Time	07:50
String	Novice skier, third lesson this year.
Text	Incident occurred around 11am. Sabrina was following my lead at the correct speed in the slow zone, when Tracy sped up and collided with her following a turn. Sabrina complained of severe left leg pain (10/10), while Tracy stated she was fine. I contacted patrol and Patrick arrived. He took Sabrina down to patrol in a sled. Both skiers were using her own skis and helmet.
Checkbox	☐
Boolean	Closed / Open
Select	Hard Pack
Number	25
Signature	Signature CLEAR 
Patroller	Patrick Roy
Lift Operator	James Holden
Ski Instructor	Jack O'Neill
Lift Maintenance Staff	Cameron Mitchell
Park Staff	Alan Grant



Saving Reports

- Selecting the green *SAVE* button at the bottom of the report screen will display 3 options for saving. Unlike the incident report, there are no mandatory fields that must be completed before you can save a report.
  - *Save Incomplete Report to this Device >* Selecting this option saves the report to the specific device you are using, meaning to access the report again you would have to use the same computer, tablet or phone. To access this report again you would select **Pending Local Reports** from the app home screen.
  - *Save Incomplete Report to Cloud >* Selecting this option saves the incomplete report to the cloud, meaning you can complete the report on any device with the EDGEauditor app installed. To access this report again you would select **Reports Saved In Progress To Cloud** from the app home screen and then choose *Other Reports in Progress*.
  - *Save and Close Out Report to Cloud >* Selecting this option indicates you have completed the report and are submitting it for review/approval.
- Regardless of the save option you choose, you will receive a prompt confirming your selection.

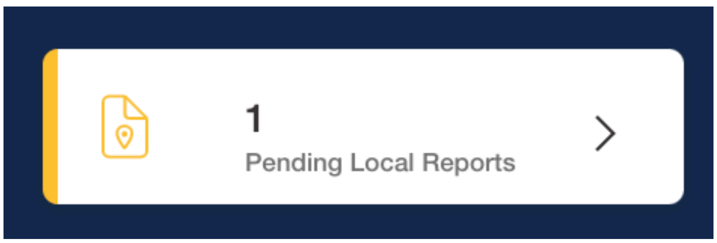


Pending Local Reports

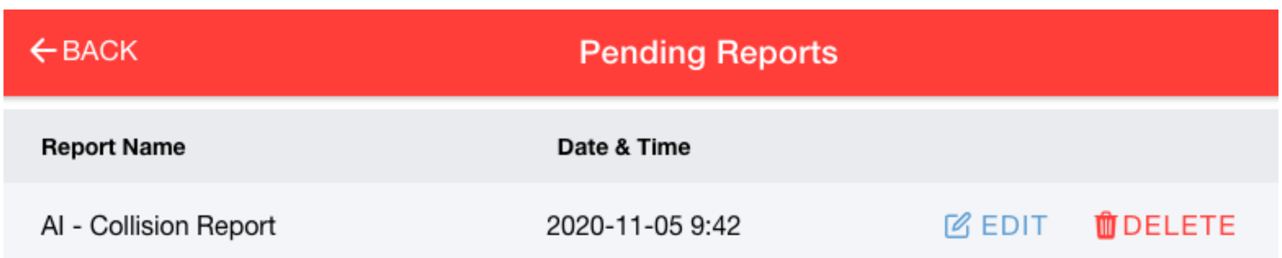
If you started a report and selected *Save Incomplete Report to this Device*, then back on the main screen you will see a numerical value (e.g., '1') in the **Pending Local Reports** module (as illustrated by the below screen shot).

Accessing Pending Local Reports:

1. Select **Pending Local Reports** from the app main screen.



2. Find the report you wish to finish from the list and select the edit icon (the one with the blue background). You can now go through and continue with the report.

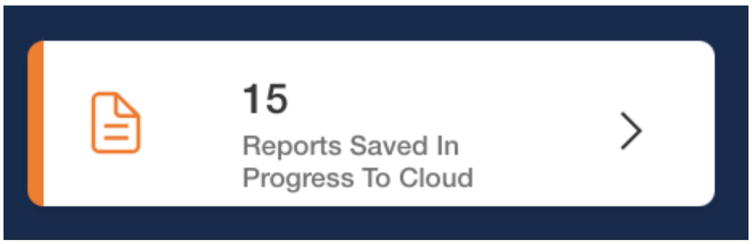


Reports Saved In Progress To Cloud

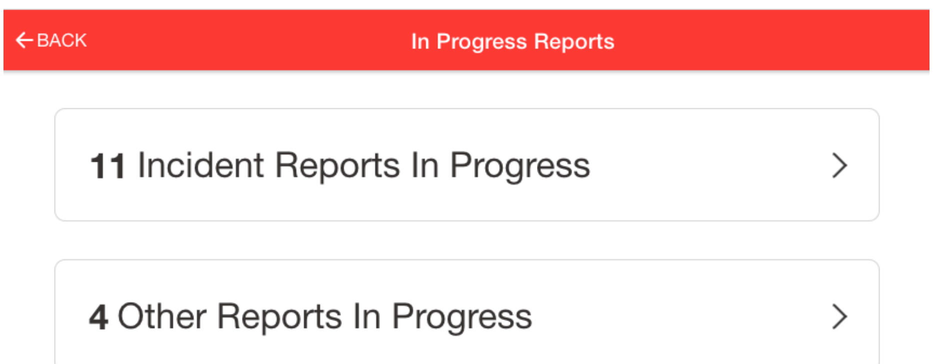
If you started a report and selected *Save Incomplete Report to Cloud*, you will see a numerical value in the **Reports Saved In Progress To Cloud** module (as illustrated by the below screen shot).

Updating Reports Saved In Progress To Cloud:

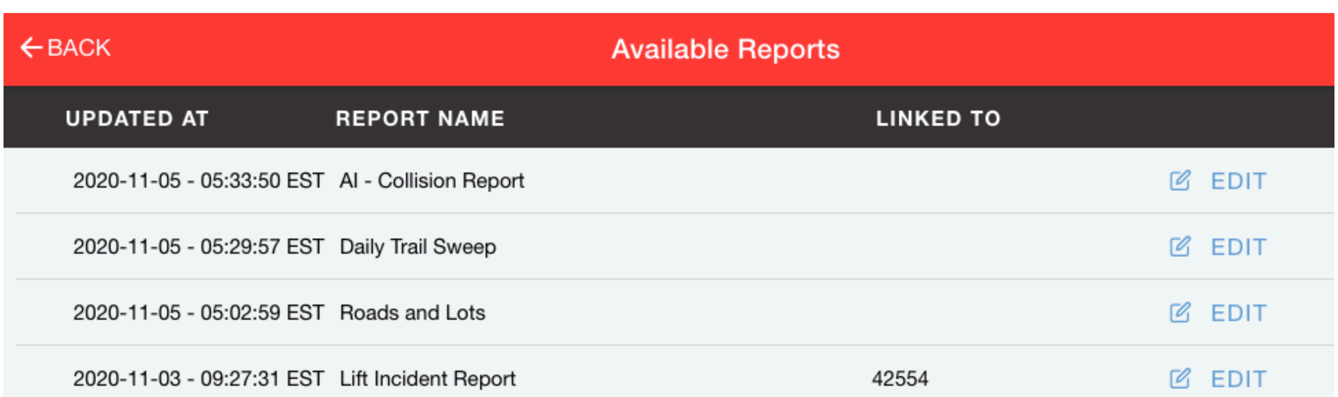
1. From the app home screen select **Reports Saved In Progress To Cloud**.



2. On the next screen select *Other Reports In Progress*.



3. Find the report you want to finish and select the edit icon. If the report is currently linked to an incident report, the report number will show in the "LINKED TO" column.



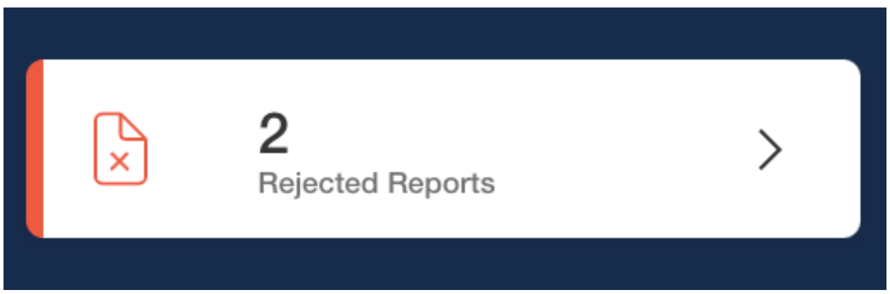
Rejected Reports

After you've submitted a report (incident report, daily log, checklist, inspection, etc.) for approval by selecting *Save Report > Save and Close Out Report to Cloud*, it will appear on the manager dashboard (resort.edgeauditor.com) for supervisor or manager approval. If any reports have been rejected, it will appear as a numerical value on the **Rejected Reports** module on the app main screen (as illustrated by the below screen shot).

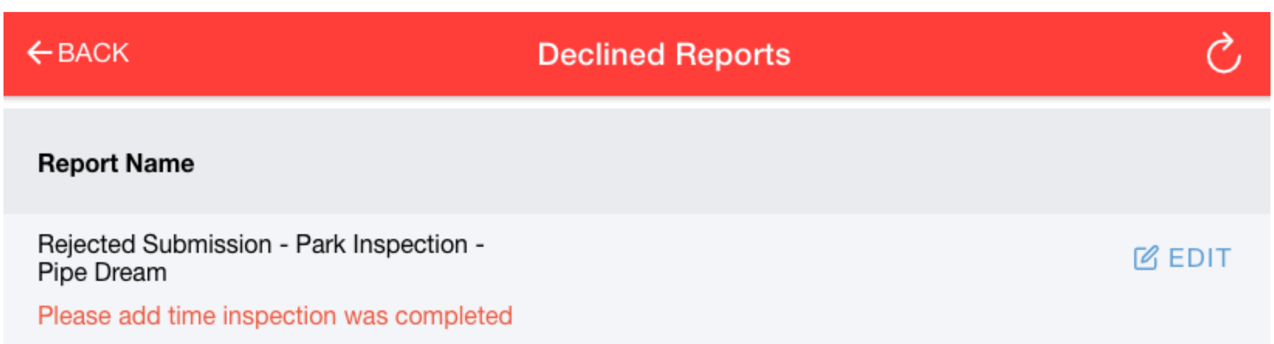
A report can be rejected for any number of reasons. It really depends on the standards set by your resort for report completion. If a report is rejected, the approver has the option to leave a comment so you can quickly tell what needs to be corrected.

Finding a Rejected Report:

1. Select **Rejected Reports** from the main screen.



2. Find the rejected report you're looking for and select the edit button. You can now update/fix the report following the reason given for its rejection and then re-submit for approval by choosing *Save and Close Out Report to Cloud*.



EDGEauditor

Viewing Submitted Reports

After you've submitted a report for approval by selecting *Save Report > Save and Close Out Report to Cloud*, it will appear on the manager dashboard. Only users who have been given access to the manager dashboard and that specific report (through report group settings) will be able to review submitted reports. To access submitted reports, open Chrome browser and go to resort.edgeauditor.com. You will login with the same credentials used to access the EDGEauditor app. After logging in, there are 2 different ways you can view submitted reports. Both are explained in detail below.

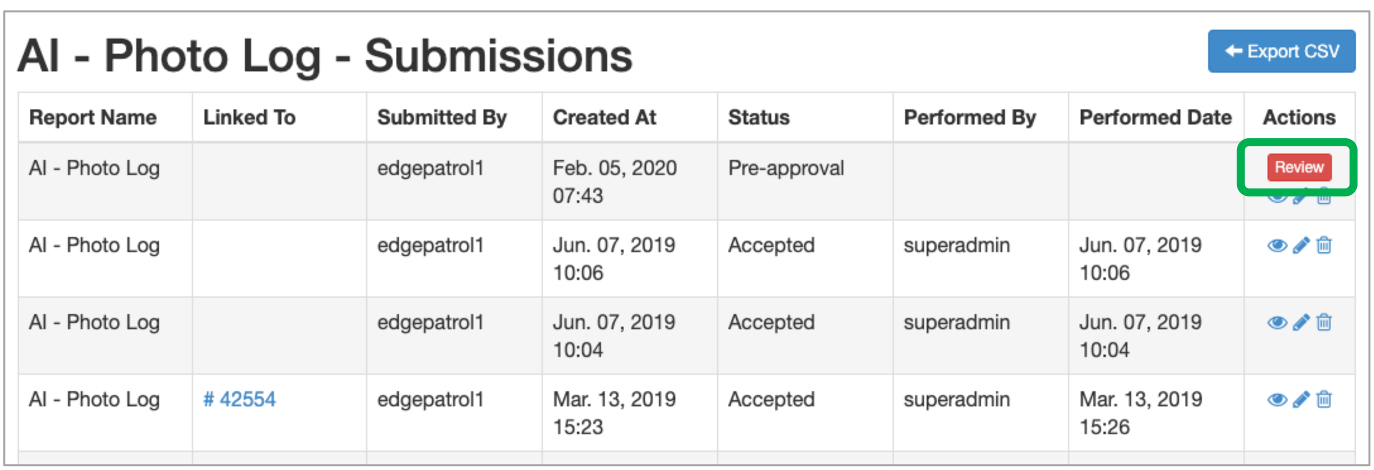
Option #1: Reviewing Reports > View All Screen

From the side navigation, click on *Reports > View All & Manage*. Locate the report you're looking for – if it's housed within a report folder, click the "eye" icon to the right of the folder name to view all reports belonging to that folder. Once you locate the report, click *Actions > View Submissions* located beside the report name. This will display a list of every submission for that particular report. You will know which ones require your attention based on the "Status" column.

Status Types:

- *Available* > Report is in progress and not yet ready for review.
- *Pre-Approval* > Report is complete and ready for supervisor/manager review.
- *Rejected* > Supervisor/manager reviewed the report and then rejected it for various reasons.
- *Accepted* > Submitted report was reviewed and approved by supervisor/manager.

For reports with a status of "Pre-approval" click the *Review* button to review the report.

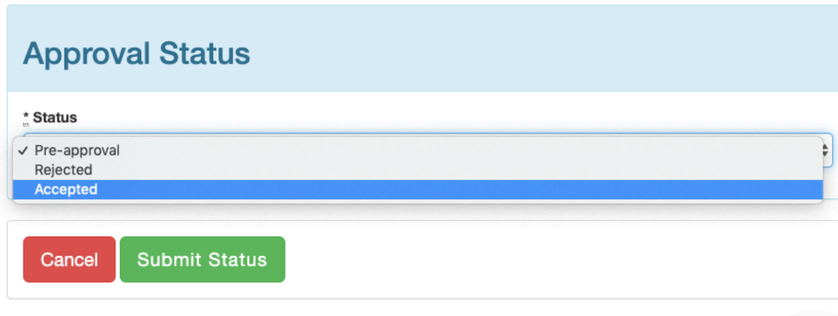

AI - Photo Log - Submissions

Export CSV

Report Name	Linked To	Submitted By	Created At	Status	Performed By	Performed Date	Actions
AI - Photo Log		edgepatrol1	Feb. 05, 2020 07:43	Pre-approval			Review
AI - Photo Log		edgepatrol1	Jun. 07, 2019 10:06	Accepted	superadmin	Jun. 07, 2019 10:06	
AI - Photo Log		edgepatrol1	Jun. 07, 2019 10:04	Accepted	superadmin	Jun. 07, 2019 10:04	
AI - Photo Log	# 42554	edgepatrol1	Mar. 13, 2019 15:23	Accepted	superadmin	Mar. 13, 2019 15:26	

If no changes are required, the user can change the status of the report from "Pre-approval" to "Accepted" under the New Approval section located at the end of the report.
If changes are required, you have two options:

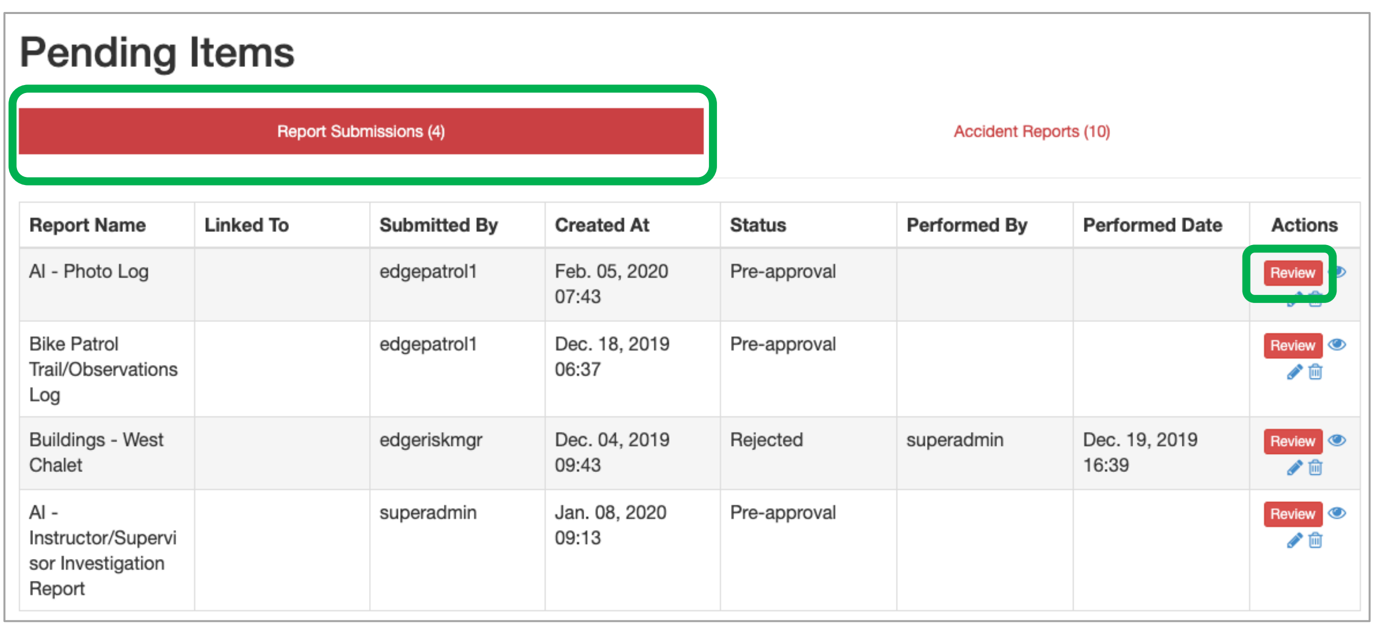
1. Go back to the main submissions screen for that report and click the "pencil" icon to make the modifications to the report directly from within the manager dashboard.
2. Change the status of the report from "Pre-approval" to "Rejected" and include a comment as to why it was rejected. Once a report has been rejected, it will appear in the **Rejected Reports** module on the app (as explained on page 14). <u>Only the user attached to the submission will see this rejected report on the app. This is because access to each report is assigned at the user level via report groups feature.</u>



Option #2: Reviewing Reports > Pending Submissions Screen

The other way to review a submitted report is through the "Pending Submissions" screen by reviewing those reports located under the "Report Submissions" tab (this is also the default screen you will land on each time you login to the manager dashboard). The Pending Submissions screen will only show reports that have a status of "Available", "Pre-Approval" or "Rejected".

To review reports with status of "Pre-Approval", simply click the Review button on the right side of the screen. The review/edit/approval/rejection process is then identical to what was described for Option 1. Once a report status is changed from "Pre-Approval" to "Accepted", it will be removed from the Pending Submissions screen. It can be accessed at any time by going to *Reports > View All & Manage* (described in detail on previous page).



Pending Items

Report Submissions (4) | Accident Reports (10)

Report Name	Linked To	Submitted By	Created At	Status	Performed By	Performed Date	Actions
AI - Photo Log		edgepatrol1	Feb. 05, 2020 07:43	Pre-approval			Review
Bike Patrol Trail/Observations Log		edgepatrol1	Dec. 18, 2019 06:37	Pre-approval			Review
Buildings - West Chalet		edgeriskmgr	Dec. 04, 2019 09:43	Rejected	superadmin	Dec. 19, 2019 16:39	Review
AI - Instructor/Supervisor Investigation Report		superadmin	Jan. 08, 2020 09:13	Pre-approval			Review

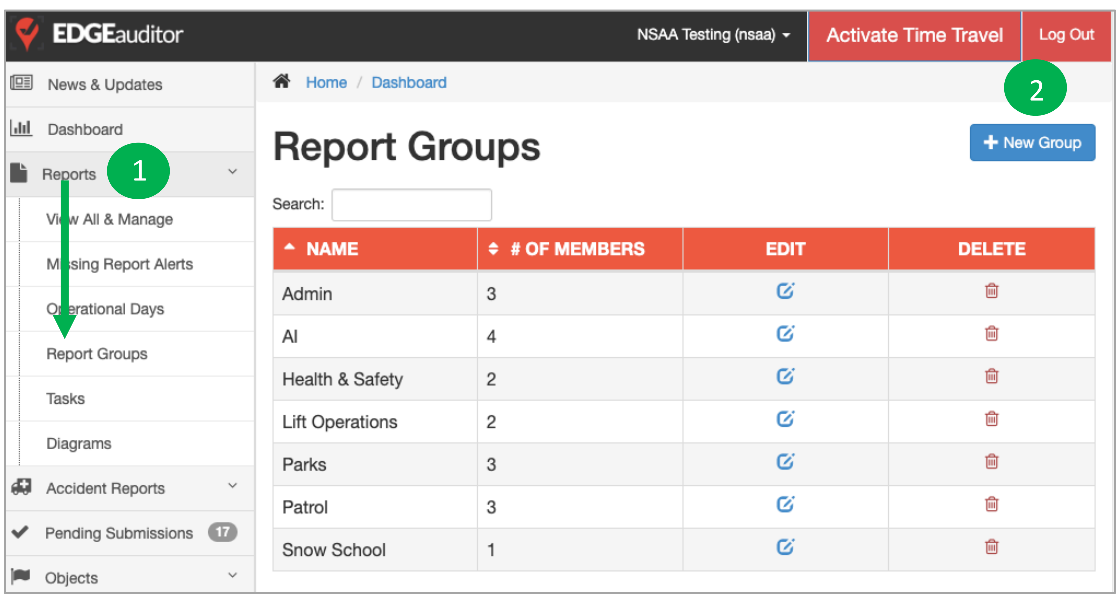
Building Reports (Manager Dashboard)

EDGEauditor allows you to digitize any paper-based report, log or checklist so everything can be completed from within the EDGEauditor app. In most cases, your EDGEauditor account manager will create the digital versions of these reports for you. However, if you wish to modify a report or have a resource who is comfortable using the platform to build reports this guide will walk you through how to do that.

Creating Reporting Groups

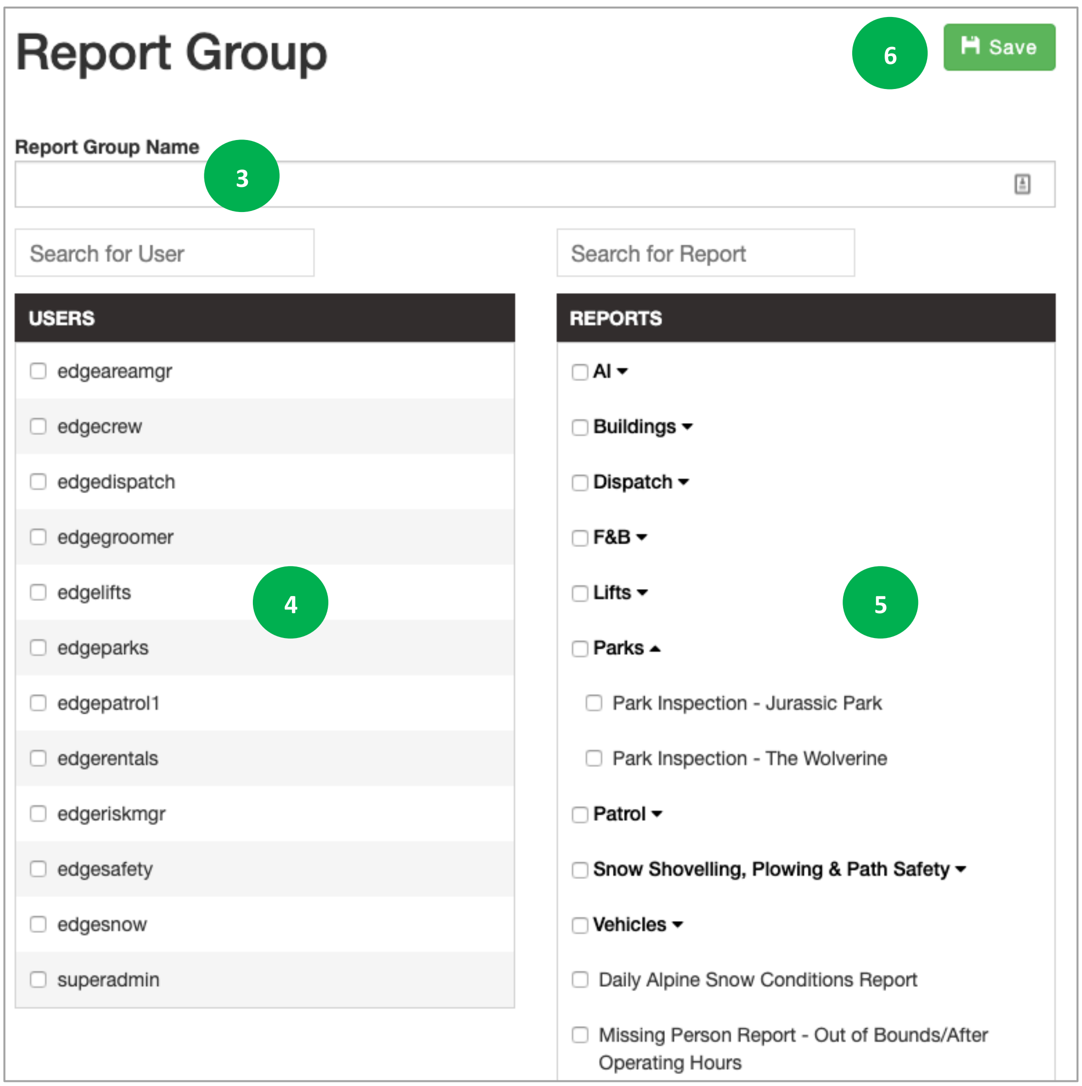
Before you start building your report, you should setup a report group. Report Groups are used to control what reports different users can access within EDGEauditor. For example, groomers would only have access to grooming logs, so they wouldn't see daily park inspections or accident investigation reports.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com and from the side navigation, go to *Reports > Report Groups*.
2. On the far right-hand side of the screen click the blue "+ New Group" button.



3. On the next screen, name your report group (e.g., Snowmaking, Grooming, Patrol, Admin, Parks, etc.).
4. From the left-side of the screen, select the users you want to be included in the group. You can either go through the list or if you know the user(s) name you can start to type to filter the results.

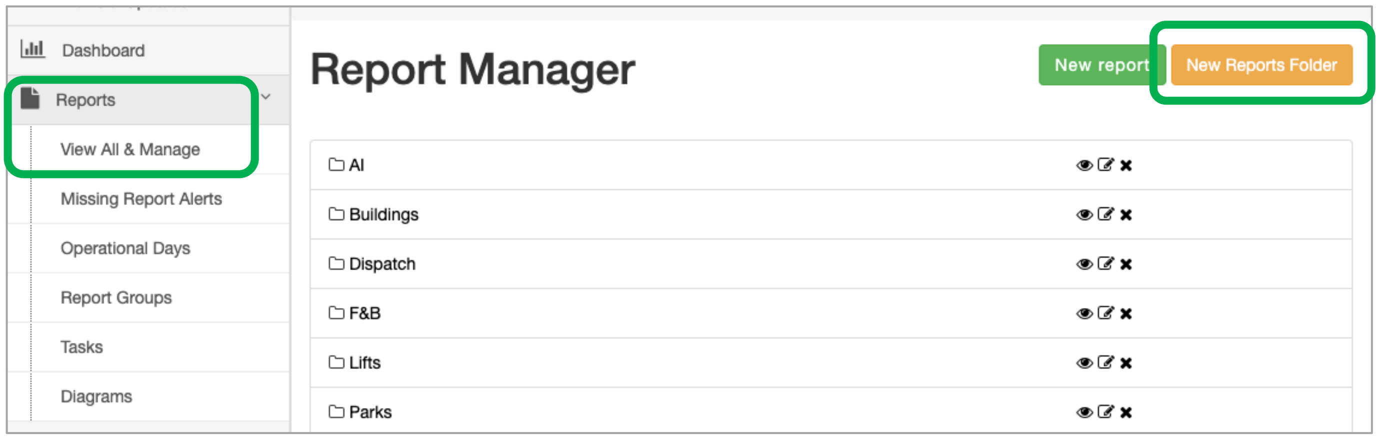
5. From the right-side of the screen, select the reports that you want those users you've selected to have access to.
    - If the reports are contained within a report folder you can either select the box beside the folder name to choose all folders belonging to that folder (and subsequent sub folders) or click the folder name to expand and only choose select reports.
    - For reports not contained within folders you can use the search functionality to type the report name and filter the results.
6. Click the green *Save* button in the top-right hand corner when finished.
7. To edit an existing group, click the "Edit Group" button back on the Report Groups main screen.
8. Repeat steps #1 through #6 for each report group to be created or modified.



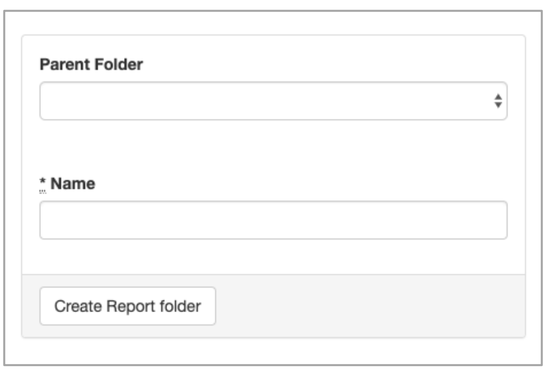
Organizing Reports Within Folders

If you have a lot of reports, it can simplify locating them on the app by grouping similar reports together within a folder (e.g., *Parks* folder for all park inspections). The folder you create on the dashboard will be available on the app with the chosen reports located inside.

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.
2. From the side navigation, go to *Reports > View All & Manage* and then click the orange "New Reports Folder" button.



3. Choose a parent folder if it applies or leave this drop-down empty.
4. Name your folder (e.g., Accident Investigation, Grooming, Health & Safety, Parks...) and click the "Create Report Folder" button.



5. To change the folder name or parent folder at any time, click the edit icon to the right of the report folder. To view the report contents of a folder, click the "eye" icon.

Different Report Layouts Explained

EDGEauditor offers 3 different types of report layouts – grid, single page & multi page. You can use a combination of one or more within the same report. To help you choose which one is right for your report the below screen shots illustrate examples of each type.

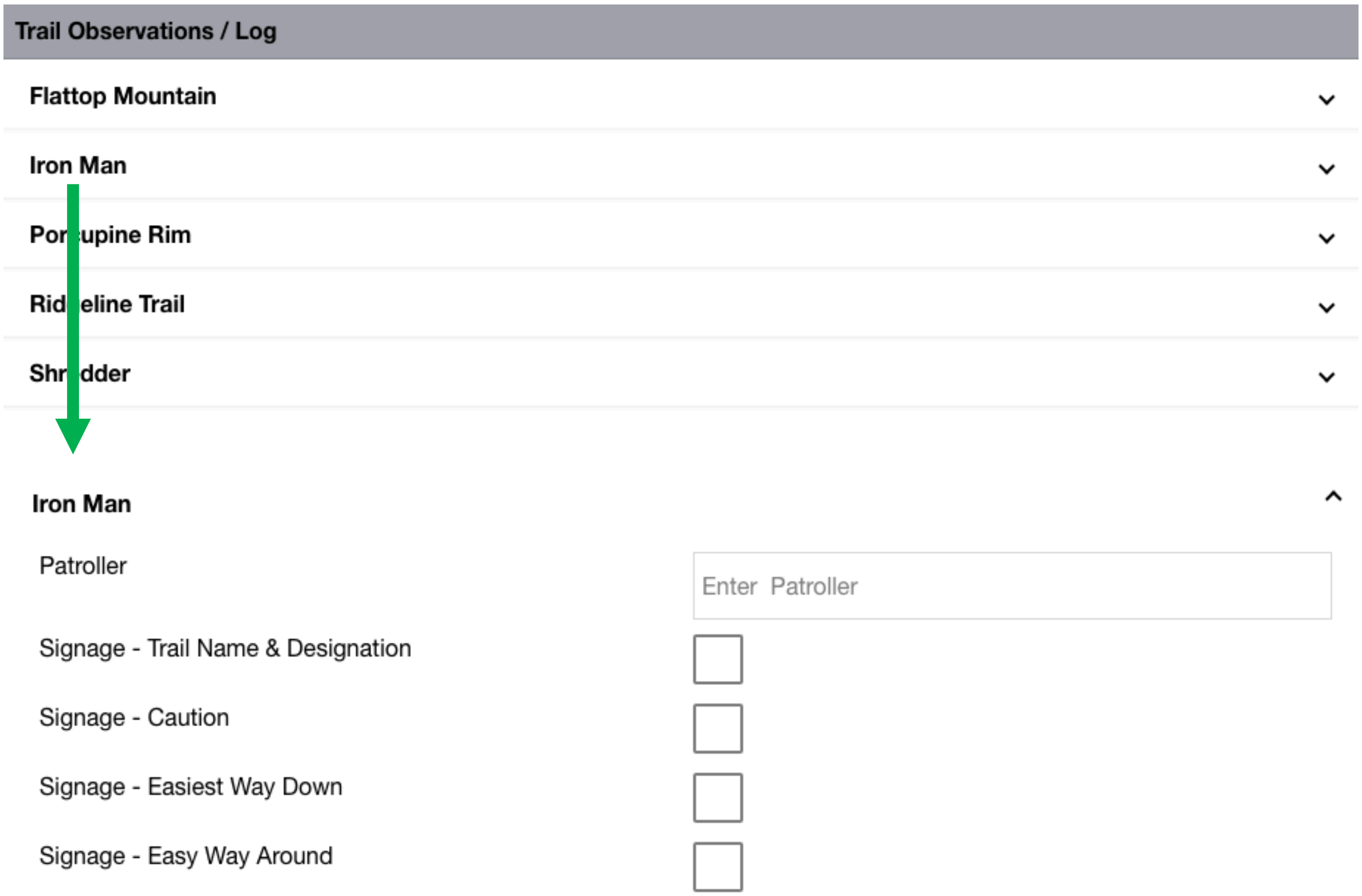
1. *Grid Layout:* Questions are listed horizontally across the screen on the app.

Parking Lots	Open	Condition	Time	Completed By	Comments / Notes
Employee Parking Lot	☐	Select Condition		Enter Completed By	Enter Comments / Notes
Parking Lot 1 (West Chalet)	☐	Select Condition		Enter Completed By	Enter Comments / Notes
Parking Lot 3	☐	Select Condition		Enter Completed By	Enter Comments / Notes
Parking Lot 4 (15 Min Drop Off)	☐	Select Condition		Enter Completed By	Enter Comments / Notes

2. *Single Page Layout:* Most common layout with questions listed vertically down the page.

Skier Information	
AI	
Injured's name	Enter Injured's name
Date of incident	
Time of incident	
Skiing/snowboarding ability level	Select Skiing/snowboarding ability level
Other party involved	Enter Other party involved
Relationship to other party	Enter Relationship to other party

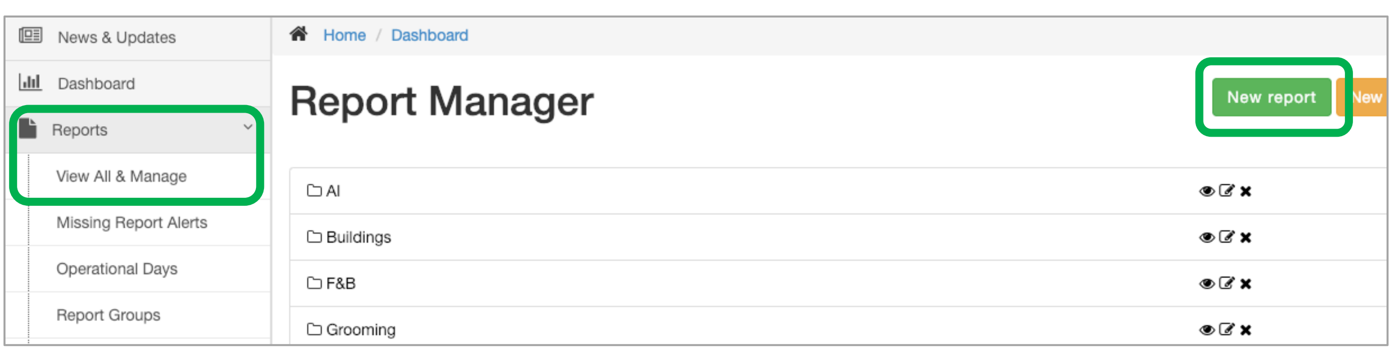
3. *Multi Page Layout:* Each object is condensed by default and then expanded when the section name is selected.



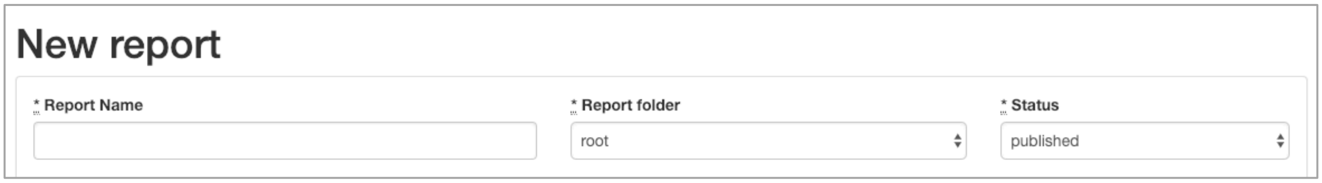
Building a New Report

1. From a desktop computer, login to the manager dashboard at resort.edgeauditor.com.

2. From the side navigation, go to *Reports > View All & Manage* and then click the green "New report" button.



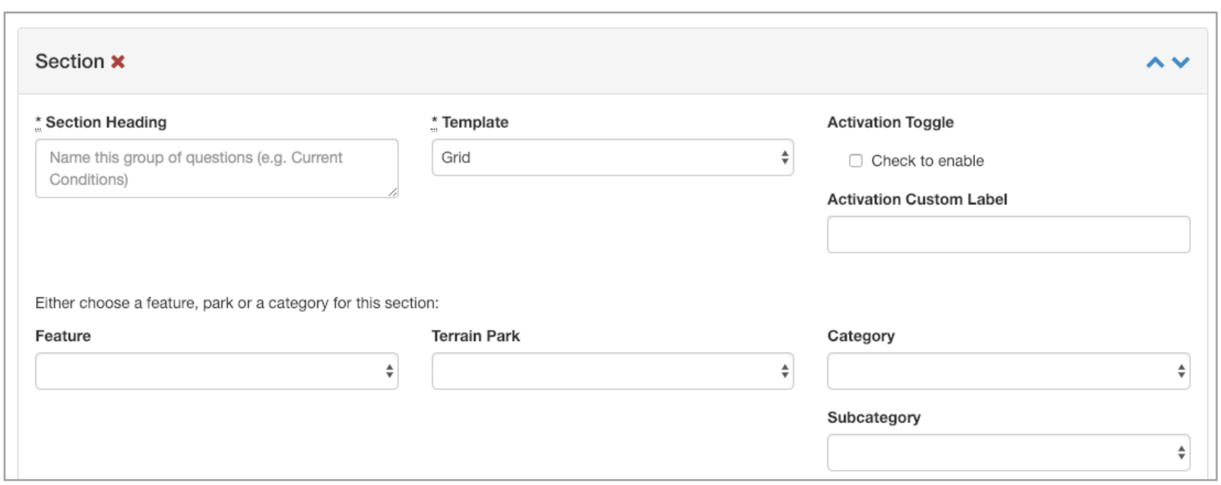
3. On the next screen, you will see the following 3 options at the top of the page:



- *Report Name* > Name your new report
- *Report folder* > Leave this as the default ("root") to not have it belong to any folder or use the drop down to add to a folder you created.
- *Status* >
  - Published: Report will appear on the app
  - Unpublished: Report will not appear on the app

4. Directly beneath those 3 fields, you will see the following options available for selection:
   - *Auto approve submissions* > If selected, each time the report is submitted the status will automatically be set to "Auto Approved" (eliminates the need for a user to manual approve the report each time).
   - *Allow staff to view historical submissions from the data entry APP* > If selected, this allows staff members to view previous submissions of the report from the app.
   - *Allow this report to be attached to an accident report* > If selected, this will provide staff with the ability to link it to an existing incident report when completing the report on the app.

5. Next, click the "Add Section" button to add the first section to your report. Before you start adding questions, you'll want to fill out the fields shown below that apply. There is no limit to the number of sections a report can have.



- *Section Heading* > Mandatory field where you give your report section a title (e.g., Park Inspection)

- *Template* > This is where you'll choose the layout for your report – Grid, Single Page or Multi-Page (see explanation of the different layouts on pages 19 & 20).
- *Activation Toggle* > Optional feature that you can check to enable. Enabling this feature won't allow users to complete questions in the section until it's checked (works with select, string, text, checkbox and Boolean type questions). If using, ensure you add a Label in the field directly beneath "Activation Custom Label".
- *Feature / Terrain Park / Category* > You must choose one of these drop downs to use
    - *Feature* > Choosing one of the available features from the drop down will act as the sub-title for your section. Feature names are pre-populated from your objects (e.g., Ski Runs, Lifts, Buildings, Other Objects, etc.).
    - *Terrain Park* > Use this drop down for your Terrain Park checklists and inspections. Doing so will auto-populate each feature from your most recent approved park build so that you only have to set up the questions once when building your report, as opposed to creating identical questions over and over each time a new feature is added or removed from a park.
    - *Category* > The available drop-down options are those items found under "Objects" in the side navigation (e.g., Ski Runs, Buildings, etc.). If you choose a category such as Vehicles without a subcategory selection, the questions within the section will be asked of every vehicle you have setup within EDGEauditor. Alternatively, you can choose a subcategory of vehicle, such as "Truck" or "Groomer" and the questions will only be asked of those vehicles that fall under those specific classifications. Similar to Terrain Park, this allows you to ask the same questions of multiple objects without having to create new questions each time.

6. Now that you've finished inputting/selecting the section information, it's time to start adding your questions. There are a variety of question types you can choose from. The table from page 10 shows the complete list of question types that are available with a brief explanation for each.

7. Proceed to add each question as needed with the appropriate question type attached to it.

8. At the end of the page you'll see a button with the label "Add Approval Group". This optional step allows you to add multiple tiers of approval to a report before it is considered to be "accepted". The order you add these groups in is the order in which they will receive notifications that a report requires their approval.
    - To use this feature, an approval group must first be added to https://resort.edgeauditor.com/approval_groups where you can select one or more users to be added to a group. Each time a report is submitted that this approval group is attached to those users will receive an email notification informing them a report requires their approval. Once the first tier of approval is complete, the next approval group will receive the same notification – this process continues until all groups have

approved the report. If the report is rejected at any point, the approval process will start over again once the report is resubmitted with the required corrections.

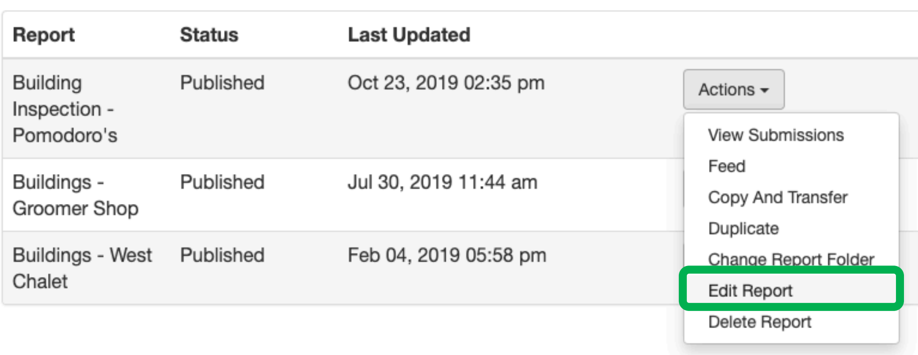
9. Once you've added all questions/sections and added any applicable approval groups (optional), click the green "Create Report" button at the bottom of the screen.

10. You will receive a confirmation message that your report was successfully created and will be asked to add it to a report group (explained on pages 16 & 17). This will ensure users belonging to that report group will be able to access the new report.

11. Login to the EDGEauditor app to view and use your new report by clicking on NEW REPORT from the app home screen. Your report will either be listed on this screen or located inside the report folder you added it to.

Making Changes to an Existing Report

1. To make any changes to a report, go to resort.edgeauditor.com and go to *Reports > View All & Manage*. Locate the report you want to edit and click the "Actions" button to the right of the report and choose the "Edit Report" option.



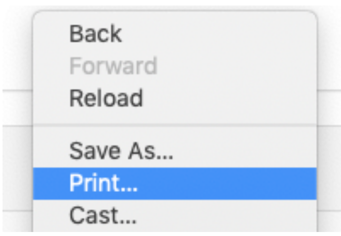
2. Make your changes before clicking the green "Update Report" button located at the bottom of the screen.

EDGEauditor

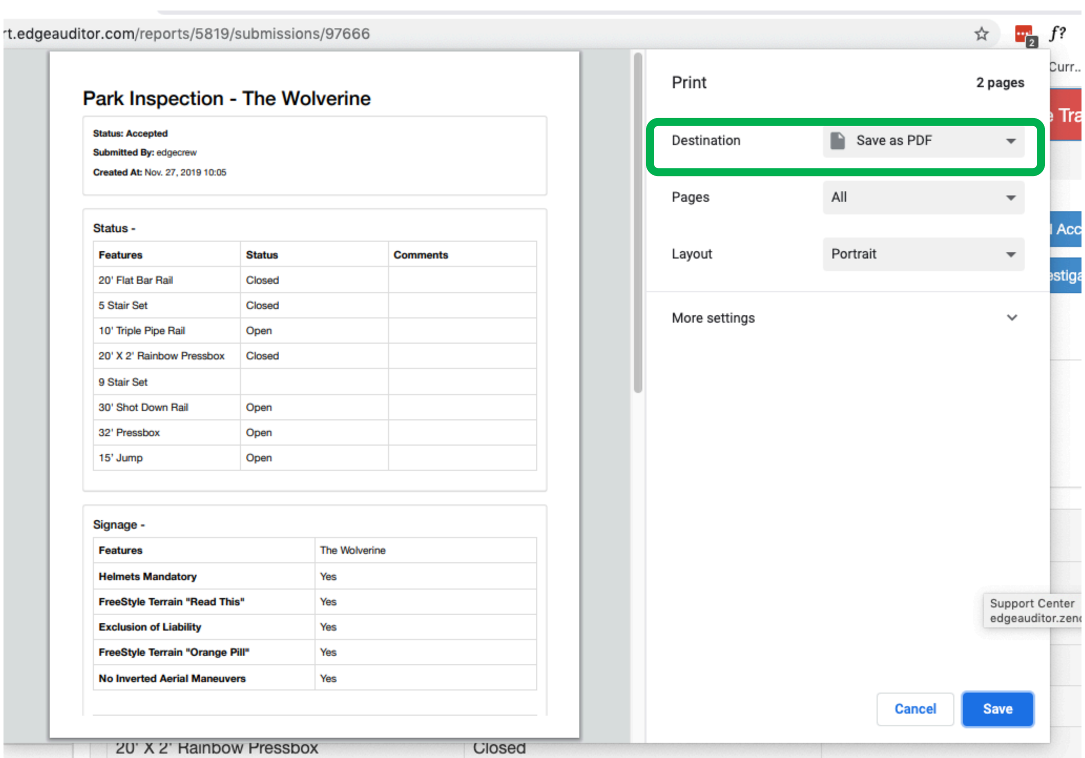
Printing Reports

If you're looking to create a printed copy or PDF of a submitted report, this can be done using the print functionality built into Chrome. To print a report, please follow the below steps.

1. Open the report you wish to print a copy of either via the Pending Submissions screen or by going to *Reports > View All & Manage*.
2. Once the report is open on your screen, right click on the screen with your cursor to bring up a short cut menu like the one shown below. Choose the "Print" option. Choosing the "Print" option will open Chrome's print preview. From here you can choose to create a PDF copy of the report or select a printer to send the report to by toggling the available options in the drop down to the right of the "Destination" option.



- If you choose "Save as PDF" click the "Save" button located at the bottom of the window to save a copy to your computer.
- If you choose the option to send to a printer, the save button will change to "Print".

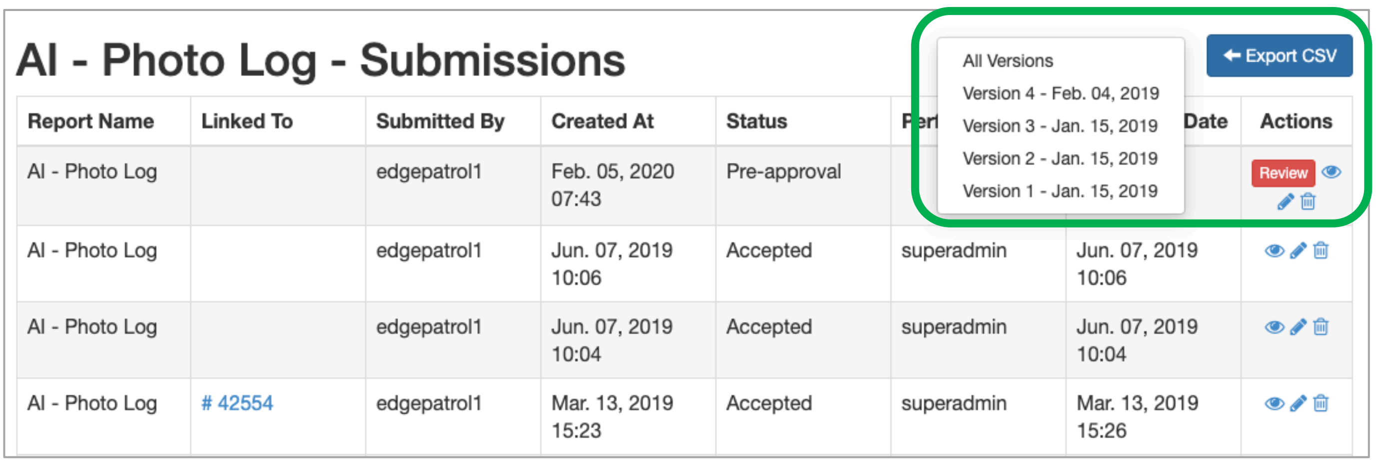


Exporting Reports

If you're looking to export data from your reports into a format that can be further manipulated, there is the option to export report data to csv. This export functionality is limited to work with reports that use the *Single Page* template option. If your report template doesn't use *Single Page* or uses a combination of Single Page and other templates (*Grid* or *Multi Page*) csv is not compatible with these formats so the data may not align properly.

To export reports that use the Single Page template, please follow these steps:

1. Find the report you wish to export either via the Pending Submissions screen or by going to *Reports > View All & Manage*.
2. Once you locate the report, click *Actions > View Submissions* located beside the report name. This will display a list of every submission for that particular report.
3. At the top right-hand side of the screen you will see a blue "Export CSV" button. Clicking this button will open a sub menu where you can choose to export *All Versions* or just a particular report version.


AI - Photo Log - Submissions

Export CSV

All Versions
Version 4 - Feb. 04, 2019
Version 3 - Jan. 15, 2019
Version 2 - Jan. 15, 2019
Version 1 - Jan. 15, 2019

Report Name	Linked To	Submitted By	Created At	Status	Perf	Date	Actions
AI - Photo Log		edgepatrol1	Feb. 05, 2020 07:43	Pre-approval			Review
AI - Photo Log		edgepatrol1	Jun. 07, 2019 10:06	Accepted	superadmin	Jun. 07, 2019 10:06	
AI - Photo Log		edgepatrol1	Jun. 07, 2019 10:04	Accepted	superadmin	Jun. 07, 2019 10:04	
AI - Photo Log	# 42554	edgepatrol1	Mar. 13, 2019 15:23	Accepted	superadmin	Mar. 13, 2019 15:26	

4. Once you choose your export option you'll receive a confirmation that your export is in progress.
5. Your export will download as a zip file once the export process is complete. It can then be unzipped and the csv file will open in Excel for viewing.

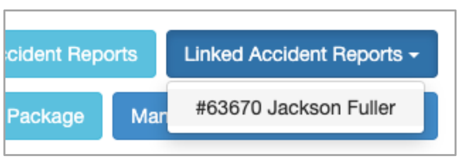
Linking a Report to an Incident Report Using the Manager Dashboard

On the EDGEauditor app users only have the ability to link to one incident report. If a user wants to link the same report to multiple incident reports, forgets to link a report to an incident report prior to submitting the report on the app, or links the report to the incorrect incident this linking process can be managed on the manager dashboard.

How to Link a Report to an Incident Report Using the Manager Dashboard

1. How to access: Navigate to *Reports > View All & Manage* and choose "View Submissions" for any of the reports listed. From the "Actions" column, choose to review/view the report by clicking on the "eye" icon.

2. The button "Linked Incident Reports" when clicked on will show a list of any currently linked accident reports. You can click on any of those to be taken to that specific accident report.

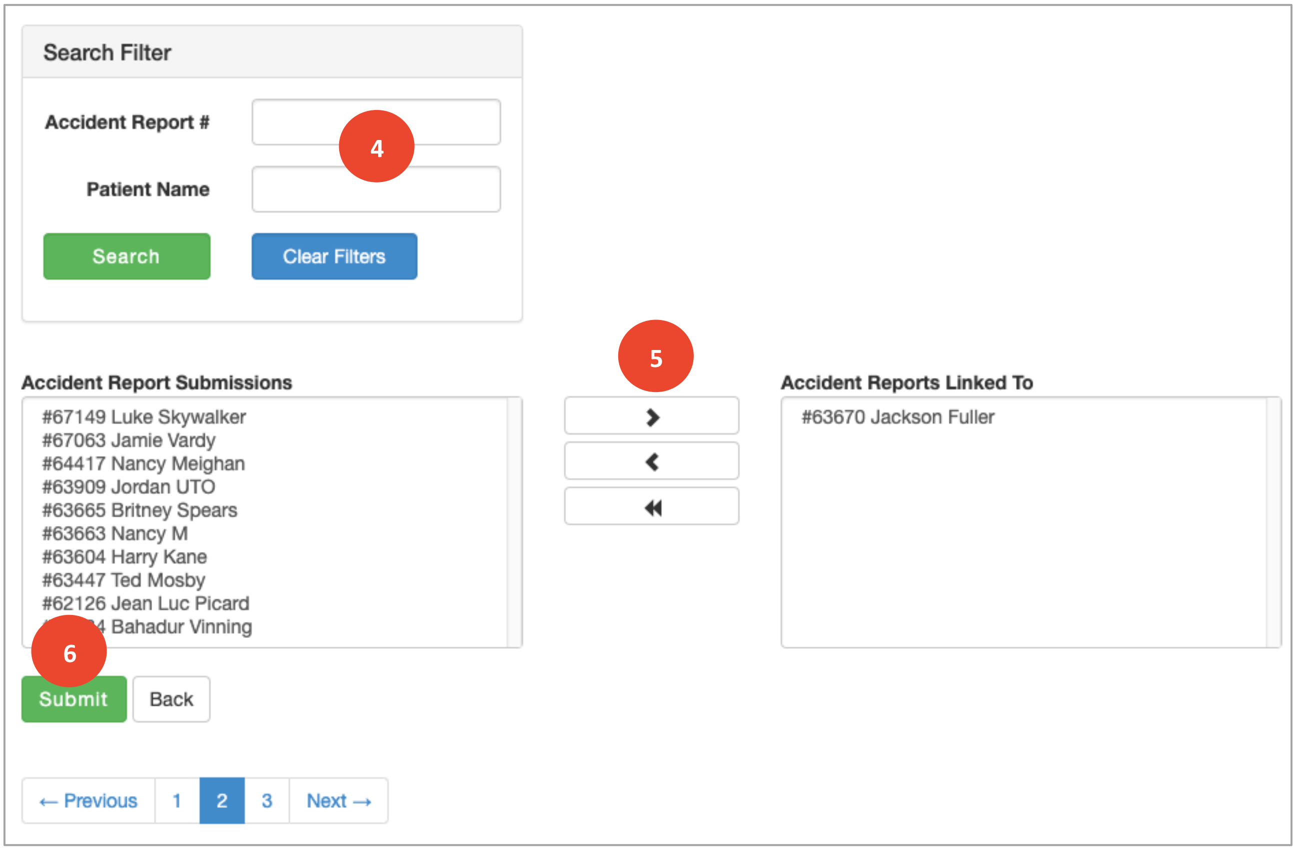


3. To add/edit/remove a linked accident report, click on the "Manage Linked Incident Reports" button.

4. Use the search filters to search by Incident Report # and/or Patient Name (partial or exact search term matches). To clear your search results, press the "Clear Filters" button.

5. Use the arrows in the boxes below to add/remove linked incident reports. Holding down the CTRL key (on a Windows computer) or the Command key (on a Mac) allows you to highlight multiple records at a time. If your search results require you to scroll through multiple pages, you don't need to click "Submit" after moving over a record to "Incident Reports Linked To". The database will remember the selections you moved over as you scroll through the pages.

6. When you are done, click the "Submit" button.



7. You will then see the changes you made reflected the next time you click on "Linked Accident Reports" from the report screen.

IMPORTANT NOTE: You can only use the "Manage Linked Accident Reports" functionality with the most current version of a report. For example, if you have a report with versions 1, 2 & 3, you can still view any previously linked incident reports for versions #1 & #2 but you cannot edit/manage any of the linked reports. In rare cases where this may need to be changed for older report versions, please email your account manager who can schedule this modification with developers.

EDGEauditor

Technical Escalation Process

Escalations may be required when team members encounter technical issues within the application. Before contacting EDGEauditor support, please ensure you:

1. Determine if the issue is isolated to a single or handful of devices or affecting all tablets.
2. Armed with the above information, contact your IT resource so they can do some internal troubleshooting first in the event it is internet related.

If your internal IT department cannot resolve the issue, please follow these steps for incident reporting to EDGEauditor:

- Go to https://edgeauditor.zendesk.com/hc/en-us/requests/new and complete the required information in order to submit your ticket. The more information you are able to provide the easier it will be for the support team to troubleshoot. Otherwise, you can open a ticket by sending an email to support@edgeauditor.com.
- For severity Level 1 Service Incidents (defined below), please call 1-866-485-3571.

Business Hours Support

- For severity Level 1 Service Incidents, support is available 24 hours a day, seven days a week.
- All other service incidents will be handled during EDGEauditor business hours:
    - 9:00am to 5:00pm ET Monday to Friday (except statutory holidays observed in the province of Ontario, Canada)

After Business Hours Support

EDGEauditor provides after hours technical support should resorts encounter Level 1 Service Incidents, which are defined as:

- Application is not accessible on all devices.
- Application is accessible but major functions (e.g., saving) are unusable to the extent that the normal business use of the application is significantly impeded.

For support after hours and during statutory holidays, please call 1-866-485-3571
or send an email to support@edgeauditor.com