STANDARD OPERATING PROCEDURE

Portal Administrators Guide

May 28, 2026

1. Introduction & Purpose

The Code 3 Rescue Command Portal is a secure, cloud-based platform engineered to streamline advanced command, control, and multi-agency coordination for modern venues. By integrating real-time personnel data, spatial and temporal analytics, resource distribution channels, and a centralized technical help desk into a single application shell, the portal provides administrators and dispatchers with an all-inclusive workspace to manage live event safety operations. Designed to support rapid decision-making under high-pressure conditions, the platform bridges the gap between field personnel, console dispatchers, and venue executives.

The purpose of this User's Guide is to establish a standardized, procedural framework for using the portal's core operational and administrative modules. By detailing the sequential workflows for **Analytics**, **Resources**, **Billing**, **Support Hub**, and **Configuration**, this document ensures that system administrators can confidently navigate the application, maintain continuous operational readiness, and maximize the utility of their Code 3 Rescue infrastructure. Ultimately, this guide serves to optimize response workflows, safeguard sensitive personnel records, and maintain accurate institutional command structures during live venue deployments.

General Request Policies

- ***Portal Access:*** The shift board is located at the Customer portal at **https://portal.c3rescue.com** under the 'Shift Board' navigation tab.
- ***Status Indicators:*** Shifts display specific indicators to denote their status. Open shifts will display a Green / Open Slot marker. Pending requests display an Amber / REQ marker, and trades display a Purple / Trade marker.
- ***Approval Required*:** Requesting a shift does not guarantee assignment. An Administrator or designated Shift Approver must review and approve all shift requests before they become active assignments.

MODULE 1: Creating Shifts, Managing Trades, and Roster Generation

1. Creating and Managing Shifts (For Admins & Dispatch)

Administrators and Dispatchers have full capability to generate, assign, and modify shifts. The platform provides tools for rapid shift creation and conflict detection.

1. **Create a Shift:** From the Shift Board, click the Create Shift button.
2. **Configure Details:** Select the assigned personnel (or leave as 'Unassigned' for an Open Shift). Set the Start and End times. You may use the 'Quick Shift' buttons to instantly populate standard 8-hour blocks (Day, Swing, or Night).

3 **Setting the Zone / Role** is important as the name of the shift that is displayed is keyed on this field.

4 **Assign Slots:** If you require multiple responders for a single operational period, increase the 'Number of Personnel (Slots)' value. This will automatically generate multiple individual open shifts for teams to claim.

5 **Save Changes:** When satisfied with the form details of the shift, click “Save Changes” to save the shift to the shift board calendar as an active / open shift. 

> **Conflict Detection:** The system will automatically check for scheduling conflicts. If the selected responder is already assigned to an overlapping shift, a red warning will appear at the bottom of the form.

2. Processing Approvals & Generating Rosters

When personnel request open shifts or attempt to trade shifts, these requests enter the Pending Approvals queue.

- **Reviewing Requests:** Click the Pending Approvals button (highlighted in amber) at the top of the Shift Board. This opens a list of all incoming requests. You may rapidly Approve or Deny personnel from this menu.
- **Daily Roster Generation:** To generate an official Command Roster, click the Daily Roster button. This will automatically generate and download a formatted PDF document grouping all active personnel by their operational zones for the current day.

MODULE 2: Responder Management, Digital Maps, and Configurations, and Integrations

1. Responder & Staff Management

Administrators manage personnel access via the Configuration tab. Here user permissions are set, approver status is selected and staff accounts are created manually by administrators.

- **Manual Onboarding:** Click 'Add Manually' in the Active Roster panel. Enter the responder's name, email, and assign their Role (e.g., Responder, Dispatch, Admin). A secure, one-time verification link will be emailed to them.
- **Shift Approvers**: By checking the 'Designate as Shift Approver' box during onboarding (or by toggling the 'Approver' checkbox in the roster list), that staff member will receive notifications for all incoming shift requests.
- **Self-Registration:** Responders can self-register from the main login screen by inputting your venue's unique Signup Access Code, found in the Responder Management panel.

2. Digital Map & Points of Interest (POIs)

The Digital Map module provides enhanced situational awareness for all responders and dispatchers.

Custom Blueprints (Pro/Enterprise): If your venue utilizes custom floor plans, navigate to the Digital Map tab and upload a high-resolution PDF blueprint to overlay onto the map. Choose your file and click the button. **Upload Map**

Placing POIs:

1. **Click Edit** POIs: ON to enter edit mode. Your cursor will become a crosshair. Click anywhere on the map to place a marker.
2. **Categorize Assets:** When the dialog opens, name the POI and select its category (e.g., AED Defibrillator, Security Post, Emergency Exit, Command Post). This dictates the icon and color applied to the map.
3. **Click Save Marker.**

3. Configuration & Administration Control

The Configuration page acts as the master management hub for your venue, allowing administrators to establish identity systems, adjust system brand aesthetics, control public-facing incident logic, and manage core internal rosters.

Procedural Workflow:

1. **Access the Module:** Click **Configuration** within the sidebar menu under the "Admin Control" header to open the primary settings workspace.

2. **Manage Venue Branding:** Locate the **Venue Branding** dashboard section at the top of the interface:

   i. Review the existing image placeholder to view your asset's current rendering.
   ii. Click **Choose File** (the file picker input) to stage a clean PNG or JPG image from your local machine.
   iii. Click **Upload Logo** to fire the asynchronous transfer. The system will process the asset via a storage proxy, bypass local device constraints, and immediately update both your management dashboard preview and the main sidebar brand header image across all operational profiles.

3. **Audit Active Personnel:** For enterprise-tier accounts, scroll down to the **Responder Management** control center to audit your operational roster:

   - Review the **Signup Access Code** card to retrieve the current secure, 6-character registration token. Share this alphanumeric string with external responders to let them self-onboard securely via the portal login portal wrapper.
   - Use the **Sort Dropdown** on the active roster header to toggle between alphabetical ordering (A–Z), enrollment date history ("Date Added"), or real-time presence activity tracks ("Last Active").

4. **Onboard Staff Manually:** To invite internal team members directly without relying on self-registration codes:

   i. Click the **Add Manually** button to pull up the stylized account invitation dialog overlay.
   ii. Provide the responder's full legal name and distinct corporate email address.

iii. Set their system authorization tier via the **Assigned Role** dropdown menu. Choose between full-access management roles (*Admin*, *Dispatch*) or restricted field operational accounts (*Paramedic*, *Security*, *Police*, *Firefighter*, *EMT*, *First Responder*).

iv. Check the **Designate as Shift Approver** box if you want this specific profile to receive automated request emails and possess authority to override roster slots. Click **Send Invite** to dispatch a secure, one-time authentication linkage.

5 **Administer Roster Security Actions:** Manage individual personnel entries within your active list layout to enforce strict system control:

v. **Adjust Permissions:** Toggle an inline dropdown menu to instantly swap security clear levels or check/uncheck their active **Approver** status flag.

vi. **Resend System Welcome Emails:** Click the **Envelope** icon to redeploy an official system onboarding message with login instructions.

vii. **Deploy Standard Password Resets:** Click the **Key** icon to trigger an automated, standard recovery link direct to their inbox.

viii. **Enforce Password Overwrites:** Click the **Lock** icon to completely overwrite a profile's password credentials via a manual command block dialog if emergency access recovery is required.

ix. **Revoke Roster Access:** Click the **Trash** icon to fully purge a responder's record profile from the active database grid.

6 **Maintain Key Venue Contacts:** Scroll to the **Venue Contacts** section to build out your emergency directory:

x. Click **New Contact** to slide out the contact data sub-form container.

xi. Complete the full name string field, enter their official designation role (e.g., Event Coordinator, Chief of Security), and provide their direct mobile phone number.

xii. Toggle the **Mark as Primary Contact** check box if this individual serves as the first-line escalation asset for active dispatch operations, then select **Save Contact**.

7 **Configure Public Reporting Prefs:** Navigate to the **Public Reporting App** form container at the base of the layout to tailor the UI elements displayed to venue attendees when scanning public emergency QR placards:

xiii. Input customized text directions in the **Instruction Text** block to guide visitors on how to flag a localized crowd incident.

xiv. Craft precise safety notices in the **Emergency Warning** text field to instruct attendees on when to bypass the local web form and immediately ring municipal emergency lines.

xv. Select **Save Preferences** to commit the textual instructions to the database core.

4. CAD & Dispatch Integrations

Code 3 Rescue supports direct synchronization with primary dispatch networks via the Integrations tab.

- ***I Am Responding (IaR)***: Enable the master toggle and input your Subscriber ID and API Key. You may define custom Dispatch Mappings to route specific incident types (e.g., EMS vs Security) differently, or use the IGNORE flag to prevent specific incident types from syncing.

- ***First Due:*** First Due integrations require a Webhook Endpoint URL and Bearer Token. Ensure your First Due endpoint is properly configured to receive JSON payloads to prevent silent dispatch failures.

MODULE 3: Analytics, Resources, Billing and Support Hub

1. Analytics

Procedural Workflow:

❶ **Access the Module:** Click on **Analytics** within the sidebar menu under the "Admin Control" header to initialize data retrieval.

❷ **Review Core Metrics:** Evaluate the top row of performance indicators:

i. **Total Volume:** The absolute count of incidents reported over the trailing 30 days.

ii. **Avg Response:** The mean duration (in seconds) between an incident's initial timestamp and dispatcher acknowledgment.

iii. **Primary Hazard:** The most frequently reported incident type classification (e.g., Medical, Security, Hazard).

iv. **Peak Traffic:** The day of the week exhibiting the highest cumulative incident volume.

❸ **Analyze Spatial Densities:** Scroll to the **Spatial Heatmap** card. Use the map interface to locate high-density incident clusters across your venue geography.

4 **Expand to Fullscreen:** Click the **Expand (`fa-expand`)** button on the heatmap card header to launch a full-viewport, detailed hotspot map. Use your mouse wheel or touchscreen gestures to zoom and isolate specific localized cluster zones. Click the close button to return.

5 **Evaluate Temporal Distribution:** Review the **Incident Distribution** doughnut chart to see the percentage breakdown of event types. Next, examine the **Temporal Analysis** heatmap grid at the bottom of the page to identify operational windows of high activity grouped by hour of the day and day of the week.

2. Billing

The Billing module tracks contract parameters, handles secure electronic processing, and aggregates monthly financial statements.

Procedural Workflow:

1 **Access Billing Details:** Click **Billing** in the sidebar menu.

- **Verify Subscription Health:** Review the top header card to confirm your subscription status (e.g., Active) along with your current base plan parameters and the upcoming invoice issuance date.
- **Audit Outstanding Balances:** Check the real-time financial summaries calculated against your base contract pricing, provisioned activation dates, and posted payment logs to verify if an immediate balance is due.
- **Examine Transaction Ledgers:** Scroll down to the **Payment History** table. Review historical rows for date stamps, description tags, precise total amounts,

and color-coded processing state badges (e.g., green for Posted/Paid, red for Overdue, yellow for Pending).

❷ **Extract Invoices:** Click the **Download Statement** text link on the card header to open the statement generation modal. Select the desired historical billing month from the dropdown menu, review the itemized breakdown (including past balance forwards), and click **Download PDF** to compile an official financial statement using client-side layout engines.

- **Submit Electronic Payments:** If a balance is due, click **Make Payment** on the main dashboard quick actions row. Enter the cardholder name, debit/credit card number, expiration date, and CVV into the secure dialog framework, then submit for processing.

3. Support Hub

The Support Hub acts as an encrypted line of communication between venue command staff and the system engineering team, featuring an itemized ticket tracking desk and integrated knowledge search.

Procedural Workflow:

❶ **Launch the Support Desk:** Click **Support Hub** from the sidebar list.

❷ **Query the Knowledge Base (KB):** Type terms into the centralized document search field on the Home view dashboard and hit Enter to jump directly to the Knowledge tab. Click any resulting article card to expand its content details inline and toggle step-by-step troubleshooting copy.

❸ **Initiate a Support Request:** If your query requires specialized technician assistance, return to the Home view dashboard or click the ticket tab to open the request compiler:

i. Select a quick-action route (e.g., Report Bug, Billing Inquiry, Feature Request) or open a fresh ticket document.
ii. Provide an explicit, descriptive **Subject Line**.
iii. Specify the operational **Category** and **Priority level** (Normal or High).
iv. Type out the complete technical details or issue description inside the text area field, then click **Submit Ticket**.

❹ **Monitor Request Lifecycles:** Navigate to the **My Tickets** view tab to review an aggregate history table of all submitted items alongside their current statuses (e.g., Open, Closed, Processing).

❺ **Engage in the Activity Stream:** Click **View** or click the subject text on any row to open that ticket's detailed message thread view. Review chronologically mapped communications split cleanly between your client messages and official technical agent replies.

❻ **Transmit Thread Replies:** To add more information to an active case file, enter your text inside the input field at the base of the conversation viewer and click **Send**. The portal will pass the transmission to storage and automatically flip the ticket's status back to an active state for developer review.

4. Resources

The Resource Center acts as a centralized repository for documentation, manuals, and deployable media assets optimized for your specific venue platform.

Procedural Workflow:

1. **Navigate to Resources:** Click **Resources** in the sidebar menu.
2. **Locate System Guides:** Find the **System Guides** section layout containing the 2x2 responsive grid card matrix.
3. **Select Your Manual:** Identify the specific documentation asset required for your current operational task:
   - **Administrator Guide:** Procedural documentation detailing overall portal configurations, financial tools, and personnel user access.
   - **Dispatch Console:** Functional instructions regarding real-time incident routing, live triage tracking, and spatial marker management.
   - **Responder Mobile App:** Instructional overview for field operations staff, detailing status updates, routing telemetry, and incident reporting.
   - **Shift Board Rules:** Administrative guidelines covering schedule logic, automated conflict/overtime alerts, open slot requests, and the peer-to-peer trade workflow.
4. **Execute Download:** Click the **Download PDF** button anchored to the bottom of the corresponding guide card. The application will trigger a secure link opening the target system guide artifact in a new tab or initiating a local disk download.