



# User Guide: Investigation Packages

---

Last Updated: August 13, 2020

## Table of Contents

---

<b>Investigation Packages - Overview</b> .....	<b>3</b>
Investigation Package Statuses .....	4
Investigation Package Categories .....	5
<b>Building Investigation Packages</b> .....	<b>6</b>
Build a New Investigation Package .....	6
Add to an Existing Investigation Package .....	7
<b>Managing Investigation Packages</b> .....	<b>8</b>
Investigation Packages - Main Page .....	8
Investigation Packages - View Page .....	9
Investigation Packages - Edit Page .....	10
<b>Technical Escalation Process</b> .....	<b>11</b>

## Investigation Packages - Overview

---

Users who have access to the manager dashboard ([resort.edgeauditor.com](https://resort.edgeauditor.com)) will be able to build their own investigation packages. Investigation packages can contain one or more of the following (depending on the modules used by your resort you may not have access to all of these):

1. Incident Report
  - Go to [https://resort.edgeauditor.com/accident\\_reports](https://resort.edgeauditor.com/accident_reports) and click the *View/Review* button for any listed incident report. You will then see buttons for *Build Investigation Package* and *Manage Investigation Package*.
2. Other Report
  - These are logs, daily inspections, incident investigation reports, etc. that are accessed by going to <https://resort.edgeauditor.com/reports> and clicking *Actions > View Submissions* for any report template listed. Find the submission you're looking for and then you will see buttons for *Build Investigation Package* and *Manage Investigation Package* on the view page of that submitted report.
3. Dispatch Event
  - Go to [https://resort.edgeauditor.com/dispatch\\_events\\_history](https://resort.edgeauditor.com/dispatch_events_history) and click the *View* button for any event listed. You will see buttons for *Build Investigation Package* and *Manage Investigation Package* on the view page of that event.
4. Terrain Park Build
  - Go to [https://resort.edgeauditor.com/park\\_builds](https://resort.edgeauditor.com/park_builds) and click either the *Review Most Recent* or *Review Past Builds* buttons to find a park build. From the park build view page you will then see buttons for *Build Investigation Package* and *Manage Investigation Package*, which you can use to link the park build to an investigation package.
5. Waiver
  - Go to [https://resort.edgeauditor.com/waiver\\_customers](https://resort.edgeauditor.com/waiver_customers) and find the customer you're looking for before clicking on the *View* button to see a list of their completed waivers. Then click on any of the waivers to see buttons for *Build Investigation Package* and *Manage Investigation Package* to link it to an investigation package.
6. Staff Training Summary
  - Go to [https://resort.edgeauditor.com/staff\\_trainings](https://resort.edgeauditor.com/staff_trainings) and locate the staff member. Then click on the *View* button or "eye" icon to link that staff member's training history to an investigation package either by clicking on *Build Investigation Package* or *Manage Investigation Package*.

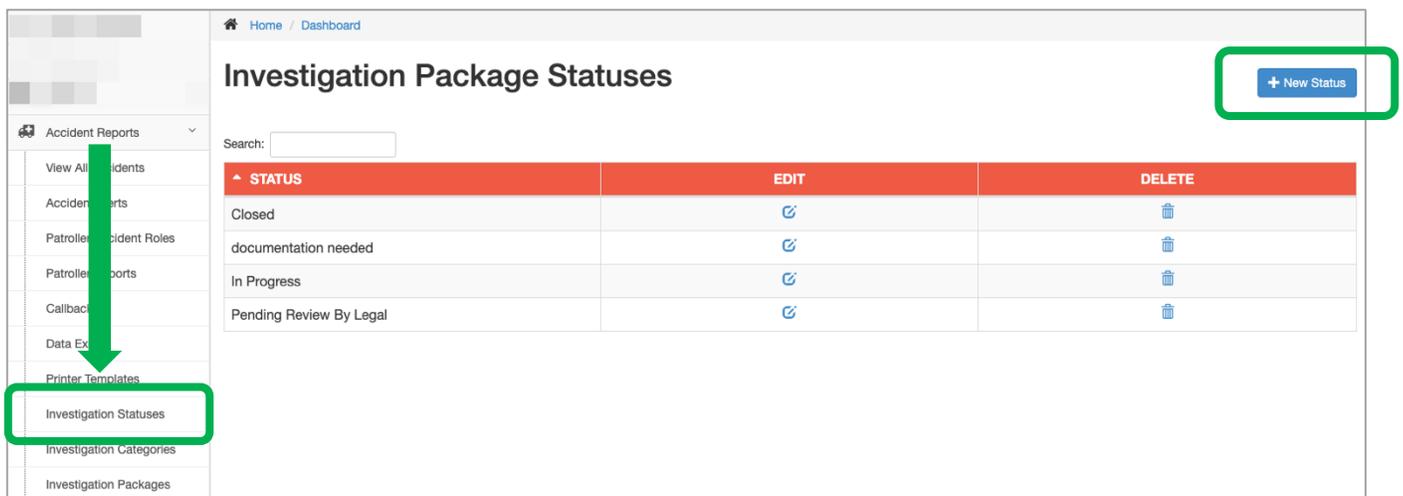
## 7. External Files

- These can be documents, images, video files, etc. that can be uploaded from your computer. There is no file size limit but depending on the speed of your internet connection, the larger the file the longer it will take to attach.

## Investigation Package Statuses

Each investigation package you create can be assigned a specific status, allowing you to keep better track of the status of all current investigations.

1. From a desktop computer, login to the manager dashboard at [resort.edgeauditor.com](https://resort.edgeauditor.com).
2. From the side navigation click on *Incident Reports > Investigation Statuses*.
3. To add a new status, click on the *New Status* button in the top right-hand corner.
  - To modify an existing status, click the edit icon from the second column in the table. To delete a status, click the trash can icon.
4. Enter the name of the new status and click the *Add Status* button.



Home / Dashboard

### Investigation Package Statuses

Search:

STATUS	EDIT	DELETE
Closed		
documentation needed		
In Progress		
Pending Review By Legal		

+ New Status

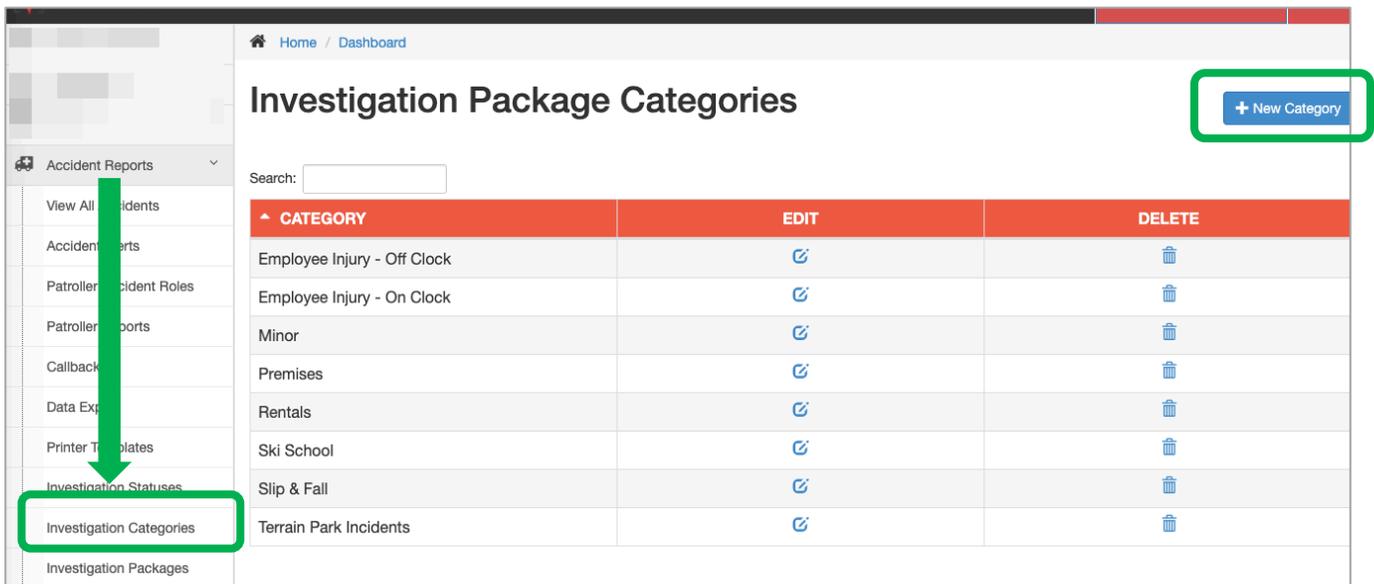
Accident Reports

- View All Accidents
- Accident Reports
- Patrol Incident Roles
- Patrol Reports
- Callback Reports
- Data Export
- Printer Templates
- Investigation Statuses**
- Investigation Categories
- Investigation Packages

## Investigation Package Categories

Each investigation package you create can be assigned to a specific category, allowing you to keep better track of the types of investigations that occur at your location and the frequency at which they occur.

1. From a desktop computer, login to the manager dashboard at [resort.edgeauditor.com](https://resort.edgeauditor.com).
2. From the side navigation click on *Incident Reports > Investigation Categories*.
3. To add a new category, click on the *New Category* button in the top right-hand corner.
  - To modify an existing category, click the edit icon from the second column in the table. To delete a category, click the trash can icon.
4. Enter the name of the new category and click the *Add Category* button.



Home / Dashboard

### Investigation Package Categories

Search:

[+ New Category](#)

CATEGORY	EDIT	DELETE
Employee Injury - Off Clock		
Employee Injury - On Clock		
Minor		
Premises		
Rentals		
Ski School		
Slip & Fall		
Terrain Park Incidents		

## Building Investigation Packages

---

To build an investigation package from scratch, you'll start by selecting either an incident report, other report, dispatch event, terrain park build, waiver or staff training summary.

The view page for each of the above mentioned sections will contain these 2 buttons:



### Build a New Investigation Package

If starting an investigation package via an incident report, the incident #, patient name and incident date fields will be pre-populated based on the data from the incident report. If you build a brand-new package from any other area those 3 fields cannot be filled in as they will auto populate once you attach an incident report.

1. Click the *Build Investigation Package* button to start a new investigation package.
2. Fill in each applicable field. Only "Package Name" is mandatory in order to create a package.
3. When you're done filling in the information, click the *Create Package* button. You will then be redirected to the main investigation packages screen where you'll receive a confirmation message that the package was successfully created.

### Build Investigation Package

<b>Incident #</b> 62126	<b>Patient Name</b> Jean Luc Picard	<b>Incident Date</b> Jun. 11 2019	<b>Package Category</b> Rentals
<b>Package Name</b> J. Picard - Kicking Horse Trail, Dislocated Shoulder+Knee Sprain		<b>Package Status</b> In Progress	

[Create Package](#)

## Add to an Existing Investigation Package

Clicking the *Manage Investigation Package* button will provide you with 2 options:

### Option 1

- If you want to add the incident report, other report, dispatch event, terrain park build, waiver or staff training summary you're viewing to an existing package, click *Add To Investigation Package*. This will open a new screen where you can search for the package you want to add it to by highlighting the package name and using the arrows to move it over to the "Investigation Packages Linked To" box.
- Click the green *Submit* button to save your changes. You'll receive a confirmation message that the package was successfully updated.
  - You can also use this to unlink an item from an investigation package if it's no longer required or was attached by mistake.

### Add to Investigation Package

**Search Filter**

Package Name

Package Created Date

**Investigation Packages**

A. Rodgers - Broken Collarbone  
Female, Teen Injured In Terrain Park  
Hip & Back Injury - Bike Park  
J. Picard - Kicking Horse Trail, Dislocated Shoulder+Knee Sprain  
J. Vardy - Broken Wrist  
Jurassic Park Injury  
L. Shaw - Ankle Injury  
Russell Wilson - Broken Leg  
Sabrina Spellman - Concussion & Neck Injury  
Slip & Fall - Main Parking Lot

**Investigation Packages Linked To**

### Option 2

- If the incident report, other report, dispatch event, terrain park build, waiver or staff training summary you're viewing is already part of an investigation package the name of the package will be shown when you click on the *Manage Investigation Package* button. You can then click on the package name to be taken to that package and view its full contents.

## Managing Investigation Packages

After an investigation package has been created, you may need to make changes to it, attach external documents, add notes or download a copy of all files included.

### Investigation Packages - Main Page

The Investigation Packages main screen can be accessed by clicking on *Incident Reports > Investigation Packages* from the side navigation. You can use the search filters at the top to find a specific package or click on the *Actions* button in the table to view, edit or delete a package. By default, this page is sorted by the “Incident Date” column, with most recent dates appearing first.

#### IMPORTANT NOTES:

- It is not possible to sort by the Patient Name column. If searching for a specific patient, please use the Patient Name search box.
- If you have more than 1 incident report attached to a package only the patient name from the first incident report added will appear in the Patient Name column. It is not possible to display more than 1 patient name.

Investigation Packages								
Search Filters								
Incident #	Patient Name	Package Name	Category	Status	Incident Date From	Incident Date To		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="button" value="Search"/>		<input type="button" value="Clear Filters"/>						
Show 10 entries		Showing 1 to 8 of 8 entries						
INCIDENT #	INCIDENT DATE	PATIENT NAME	PACKAGE NAME	CATEGORY	STATUS	VIEW	EDIT	DELETE
62366	Oct. 16 2019	Patrick Roy	Patrick Roy - Concussion & Neck Injury	Mountain Biking	In Progress			
62126	Jun. 11 2019	Jean Luc Picard	J. Picard - Kicking Horse Trail, Dislocated Shoulder+Knee Sprain	Rentals	In Progress			
59157	Mar. 22 2019	Ted Mosby	Slip & Fall - Main Parking Lot	Slip & Fall	Pending Legal Review			
52432	Feb. 3 2019	Aaron Rodgers	A. Rodgers - Broken Collarbone	Terrain Park Incidents	In Progress			
52434	Feb. 2 2019	Sabrina Spellman	Female, Teen Injured in Terrain Park	Minor	Documentation Needed			
52433	Feb. 2 2019	Russell Wilson	Russell Wilson - Broken Leg	Terrain Park Incidents	Closed - Settlement Reached			
42554	Nov. 8 2018	Jamie Vardy	J. Vardy - Broken Wrist	Employee Injury - Off Clock	Documentation Needed			
			Hip & Back Injury - Steps Outside Pomodoro's	Premises	In Progress			

## Investigation Packages - View Page

The investigations package view page opens a read-only copy of the investigation package. The two main actions you can take from this screen are:

1. Under the Action column click the *View* button to be taken directly to that report, waiver, terrain park build, etc., or click the *Download* button to download a specific external document that is attached to the package.
2. Click the *Download Package* button to download all files belonging to that package. After clicking the button you will be redirected back to the main investigation packages screen with a confirmation message that your package is being built. The actual download won't start until the build process is finished. The time it takes to build and download a package will depend on the size of all files included in the package as well as the speed of your internet connection. **IT IS VERY IMPORTANT YOU DO NOT CLOSE THIS WINDOW WHILE THE BUILD IS IN PROGRESS, OTHERWISE IT WILL CANCEL YOUR DOWNLOAD.** You can continue to navigate the manager dashboard or another website by opening a new browser tab.

### Investigation Package

[Download Package](#)
[Edit](#)

<b>Incident #</b> 62366	<b>Patient Name</b> Patrick Roy	<b>Incident Date</b> Oct. 16, 2019	<b>Package Created Date</b> Jun. 11, 2019
<b>Package Name</b> Patrick Roy - Concussion & Neck Injury	<b>Package Category</b> Mountain Bike Trail	<b>Package Status</b> In Progress	

**Notes**

By	Date	Note
Kirk Muller	Oct. 17, 2019	Patient left resort via ambulance. Looking to get more details in the coming days.

**Package Contents**

Name	Date Completed	Type	Action
Patrick Roy	Oct. 17, 2019	Accident Report	<a href="#" style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 4px;">View</a>
Bike Patrol Trail/Observations Log	Oct. 17, 2019	Report	<a href="#" style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 4px;">View</a>
jump-take off	Oct. 17, 2019	Supporting Document/Media	<a href="#" style="background-color: #007bff; color: white; padding: 2px 10px; border-radius: 4px;">Download</a>
jump-landing	Oct. 17, 2019	Supporting Document/Media	<a href="#" style="background-color: #007bff; color: white; padding: 2px 10px; border-radius: 4px;">Download</a>
Patrick Roy - Bike Rental Waiver	Jul. 17, 2019	Waiver	<a href="#" style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 4px;">View</a>

## Investigation Packages - Edit Page

The investigations package edit page is where you can modify the details of your investigation package. The main actions you can take from this screen are:

1. Change the package name, category or status.
2. Add a new note or modify/delete an existing one.
3. Remove a linked incident report, other report, dispatch event, terrain park build, waiver or staff training summary by clicking the *Delete* button under the Action column. This will only remove the item from the current package.
4. Attach files saved on your computer either by clicking the *Browse Files* button or dragging and dropping them into the section provided (with this method you can attach multiple files at once).

### Edit Investigation Package Save

<b>Incident #</b> 62366	<b>Patient Name</b> Patrick Roy	<b>Incident Date</b> Oct. 16 2019	<b>Package Category</b> Mountain Bike Trail
<b>Package Name</b> Patrick Roy - Concussion & Neck Injury		<b>Package Status</b> In Progress	

**Notes**

By	Date	Note	Edit	Delete
Kirk Muller	Oct. 17, 2019	Patient left resort via ambulance. Looking to get more details in the coming days.	Edit	Delete

New Note

**Package Contents**

Name	Date Completed	Type	Action
Patrick Roy	Oct. 17, 2019	Accident Report	Delete
Bike Patrol Trail/Observations Log	Oct. 17, 2019	Report	Delete
jump-take off	Oct. 17, 2019	Supporting Document/Media	Delete
jump-landing	Oct. 17, 2019	Supporting Document/Media	Delete
Patrick Roy - Bike Rental Waiver	Jul. 17, 2019	Waiver	Delete

Drag & Drop Files Here

or

Browse Files

## 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](mailto: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](mailto:support@edgeauditor.com)**