Bay Area Urban Area Security Initiative

Community Resilience Initiative

Community Recovery Coordination Platform

User Manual

December 2025

CONSTANT ASSOCIATES

BAY AREA URBAN AREAS SECURITY INITIATIVE

Table of Contents

User Manual

Introduction

Purpose

This platform provides a free and flexible platform for coordination to help ensure community service providers have the resources they need to meet needs across communities of the Bay Area. This is intended as a tool for resourcing unmet needs, particularly during long-term recovery, and as a supplement rather than replacement for current systems. The goals of this platform are to:

- Improve Information Collection
- Enhance Situational Awareness
- Strengthen Collaboration

Overview

Microsoft Teams helps communities and organizations with long-term recovery by offering a free platform for communication and resource requests. Channels provide space for discussions, while embedded surveys and an ArcGIS dashboard support introductions and coordination.

By participating in conversations, submitting requests, completing the capabilities survey, and sharing the platform, you'll contribute to making Microsoft Teams more effective and valuable.

Definitions and Terminology

Capability Survey: A survey where organizations can share their resources and abilities to support needs. often defined by measurable performance objectives and supported by resources, planning, and training.

Guest: Lowest level of permission for a Microsoft Teams page. Guests can participate in channels and chats and view pages but cannot change team settings.

Long-Term Recovery: Multiyear efforts from across the community to restore, redevelop, and revitalize a community after a disaster.

Member: Full participation access for a Microsoft Teams page. Members can create channels and participate in the group. Members cannot delete channels or teams.

Multifactor Authentication: A security process requiring two or more verification methods (e.g., password plus mobile code) to confirm a user's identity.

Owner: User who has editable access to a Microsoft Teams page. Owners can moderate roles and posts across posts, edit the team infrastructure, manage channels, and participate in Teams functions.

Request Survey: A survey where organizations can appeal for resources or assistance to support their work, especially for long-term recovery efforts.

Unmet Needs: Requirements or demands that have not been fulfilled and are not currently accommodated by existing systems for recovery or nonprofit coordination.

Microsoft Teams

Joining the Platform

To become a member of the platform, please complete the required request form. The link to this form may be obtained from an existing member or directly from the platform administrator. Existing members also have the ability to submit requests on behalf of others. Upon submission, the administrator will review your application and assign you an appropriate role.

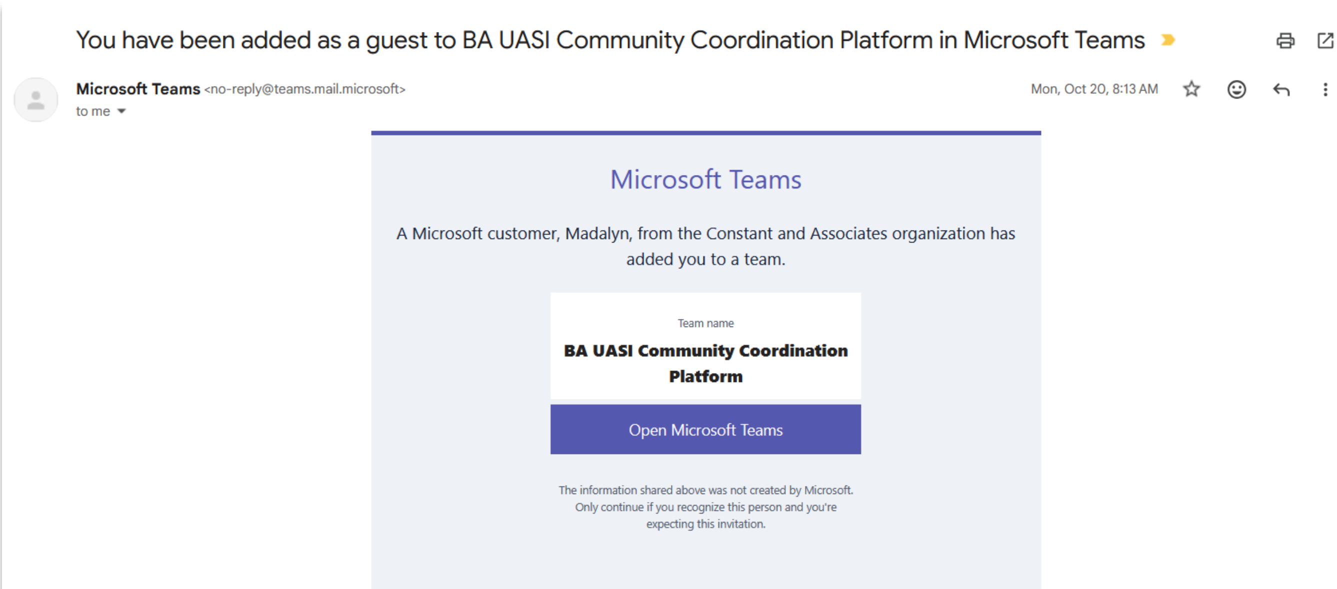


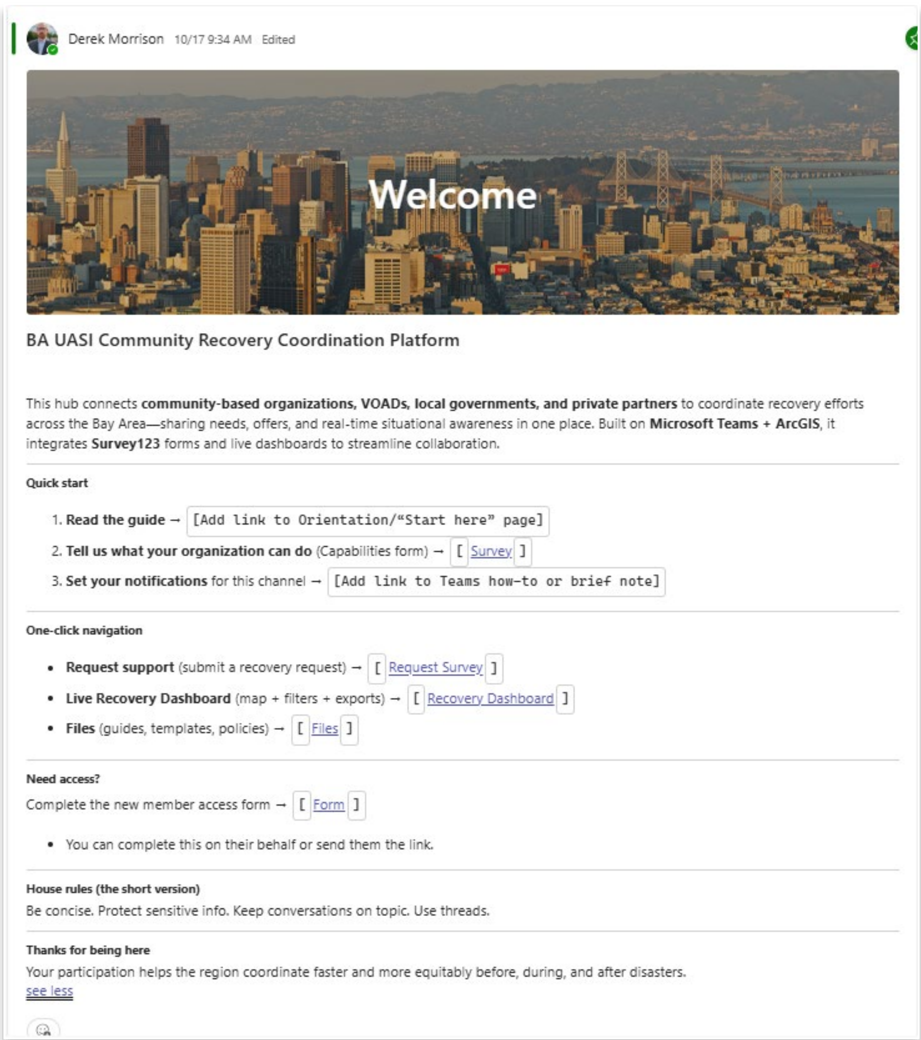
Image 1: Welcome Email

After your membership is established, you will receive two emails from Microsoft Teams. Please locate the email stating that you have been added as a guest and select "Open Microsoft Teams." A new window will prompt you to set up multifactor authentication. You may configure a multifactor authentication for identity confirmation, or choose to skip this step to proceed to the platform.

Communication Channels

Welcome Post

When you first open the platform, you'll see a welcome post in the Posts tab. This post introduces the Community Recovery Coordination Platform and explains its purpose: connecting organizations and partners to share resources, requests, and real-time information. It provides quick-start steps such as reading the orientation guide, completing a capabilities survey, and setting notifications. The post also includes one-click links for submitting support requests, accessing the live recovery dashboard, and finding files like guides and templates. Additionally, it outlines how to request access for new members, shares basic communication guidelines, and emphasizes the importance of participation in supporting equitable and efficient disaster recovery.



Derek Morrison 10/17 9:34 AM Edited

Welcome

BA UASI Community Recovery Coordination Platform

This hub connects **community-based organizations, VOADs, local governments, and private partners** to coordinate recovery efforts across the Bay Area—sharing needs, offers, and real-time situational awareness in one place. Built on **Microsoft Teams + ArcGIS**, it integrates **Survey123** forms and live dashboards to streamline collaboration.

Quick start

1. **Read the guide** → [Add link to Orientation/"Start here" page]
2. **Tell us what your organization can do** (Capabilities form) → [Survey]
3. **Set your notifications** for this channel → [Add link to Teams how-to or brief note]

One-click navigation

- **Request support** (submit a recovery request) → [Request Survey]
- **Live Recovery Dashboard** (map + filters + exports) → [Recovery Dashboard]
- **Files** (guides, templates, policies) → [Files]

Need access?

Complete the new member access form → [Form]

- You can complete this on their behalf or send them the link.

House rules (the short version)

Be concise. Protect sensitive info. Keep conversations on topic. Use threads.

Thanks for being here

Your participation helps the region coordinate faster and more equitably before, during, and after disasters.

see less

Image 2: Welcome Post

New Requests

When person submits a new survey request, it generates a post on this page for discussion among participants. Remember to review these posts regularly and tag anyone relevant who hasn't replied yet. If you find duplicate posts or if the group asks for removal, you can also delete them.

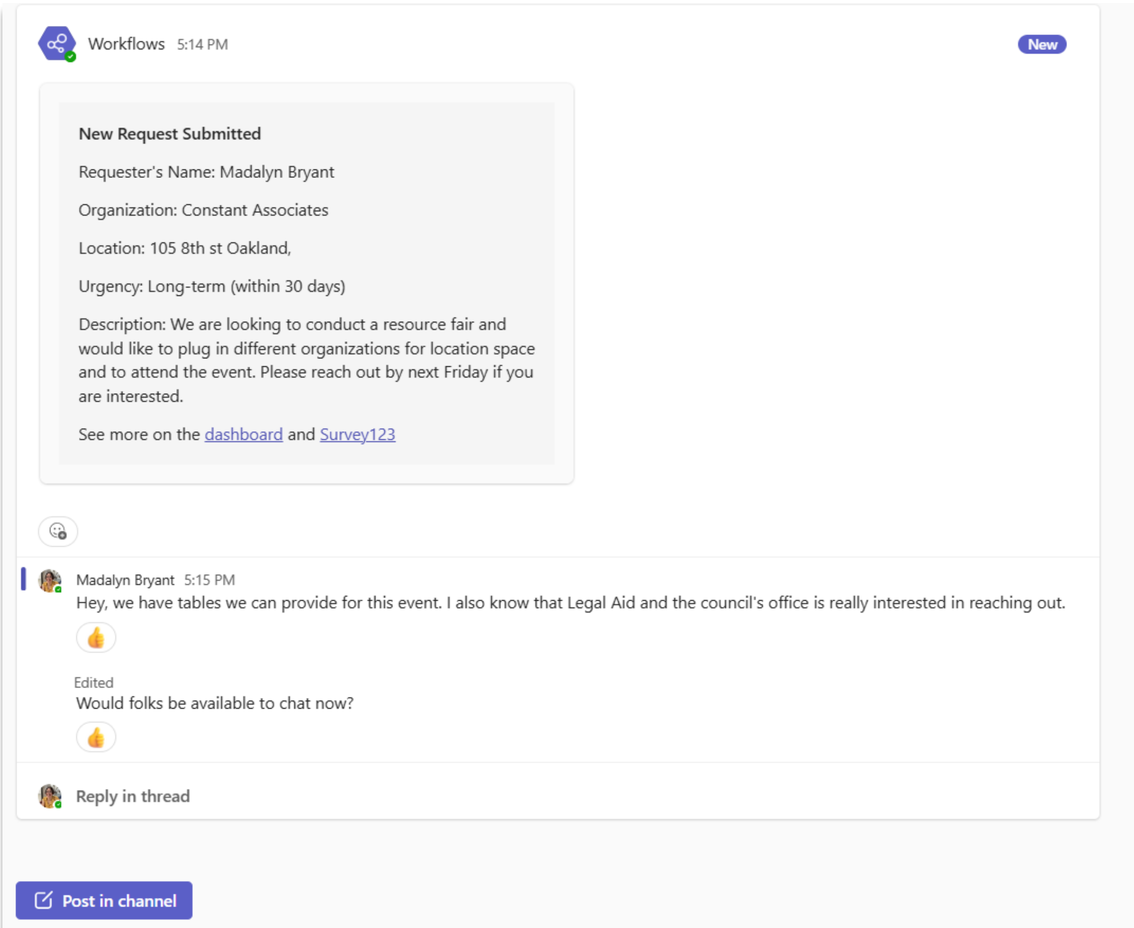


Image 3: Example Automated Request Post

Meet Now

The Meet Now feature allows users to start an instant meeting without scheduling it in advance. It's available in channels, chats, and calendars, making it easy to quickly connect with team members.

- **Owners:** Can start a Meet Now session or schedule a meeting in any channel they own, invite participants, and manage meeting settings such as recording and breakout rooms.
- **Members:** Can also start Meet Now in channels they belong to and invite others, but their control over meeting options may be limited compared to owners.
- **Guests:** Can join Meet Now meetings when invited but cannot initiate them. Their permissions are restricted—they typically cannot access channel files or advanced meeting controls.

This feature is ideal for spontaneous discussions or urgent collaboration without the need for formal scheduling.

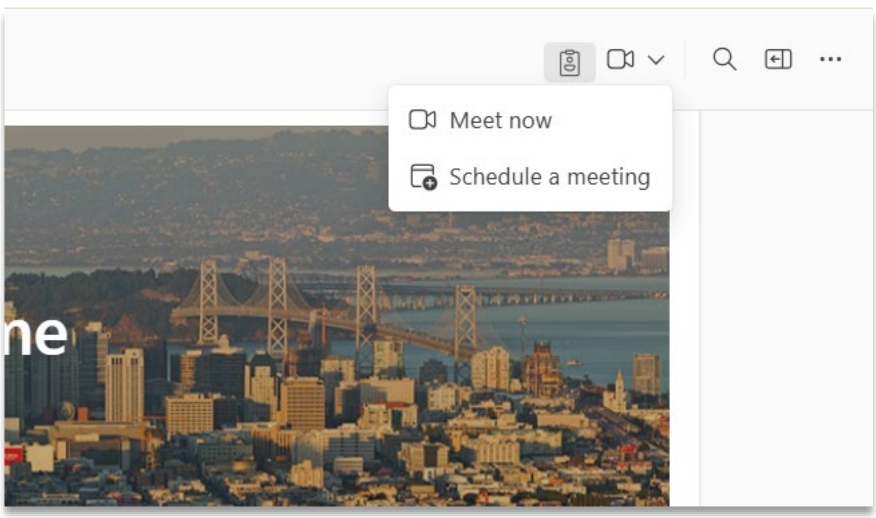


Image 1: "Meet Now" or "Schedule a Meeting"

Alerts and Notifications

Teams Notifications

Notifications in Microsoft Teams help you stay informed about activity within a specific team or channel. You can customize alerts for posts, mentions, and replies to ensure you don't miss important updates.

- **Owners:** Have full control over notification settings for themselves and can guide team-wide settings. They can also manage channel moderation and decide if members can post or tag the entire team.
- **Members:** Can personalize their own notifications for channels and chats, including turning on alerts for all activity or only mentions. They cannot change team-wide settings.
- **Guests:** Have limited options—typically they can adjust personal notifications for mentions and replies but may not have access to advanced settings like channel moderation or tagging permissions.

To set notifications, click the ellipsis (…) next to a channel, select Channel notifications, and choose your preferred level: All activity, Mentions & replies, or Off.

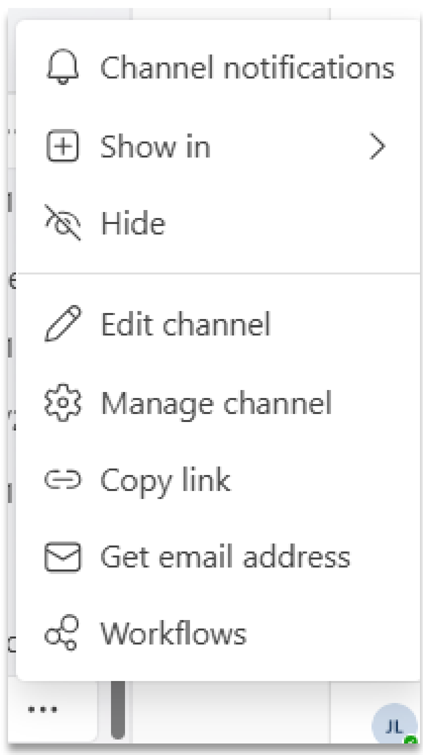


Image 2 :Pop-up Window for the Channel Notifications

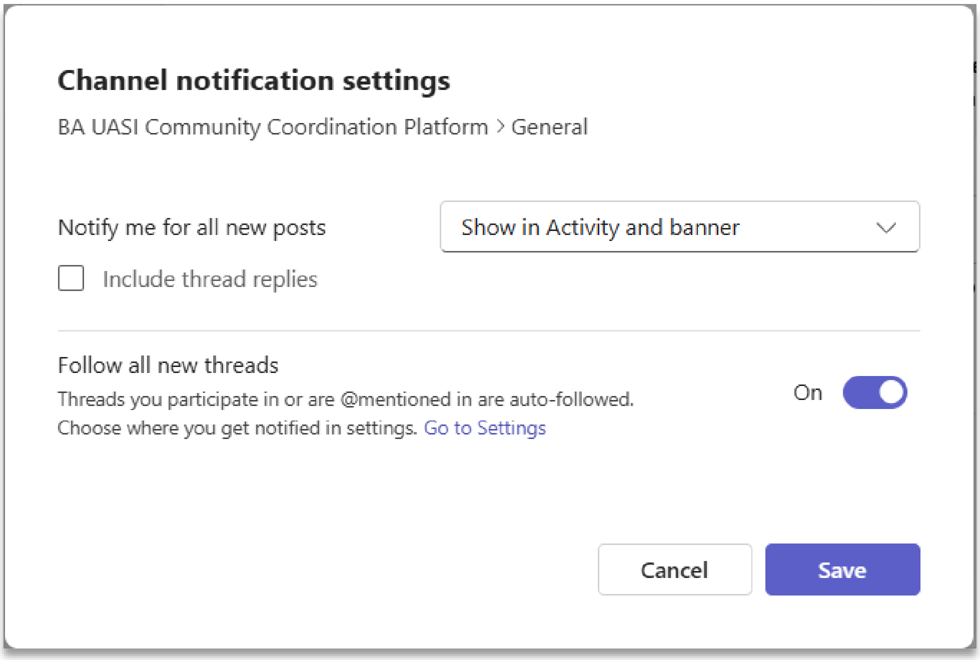


Image 3: Notification Options

Email Notifications

Microsoft Teams can send email notifications to keep you informed about missed activity, mentions, and messages when you’re not actively using the app. These notifications are controlled through your Teams settings under Notifications → Email.

- **Owners:** Can configure their own email notification preferences and also influence team-wide settings, such as enabling or disabling certain notifications for the team.
- **Members:** Can adjust personal email notifications for missed activity, mentions, and digest summaries but cannot change team-wide defaults.
- **Guests:** Have limited options—typically they can receive email notifications for mentions and missed activity but may not have access to advanced customization or digest summaries.

Common options include setting the frequency for missed activity emails (e.g., As soon as possible, Every 10 minutes, or Daily) and enabling or disabling notifications for specific events.

File/Folders

The Files tab in each channel provides a central location for storing and sharing documents, templates, and resources. This feature enhances collaboration by allowing team members to access, edit, and manage files in real time without leaving the Teams environment.

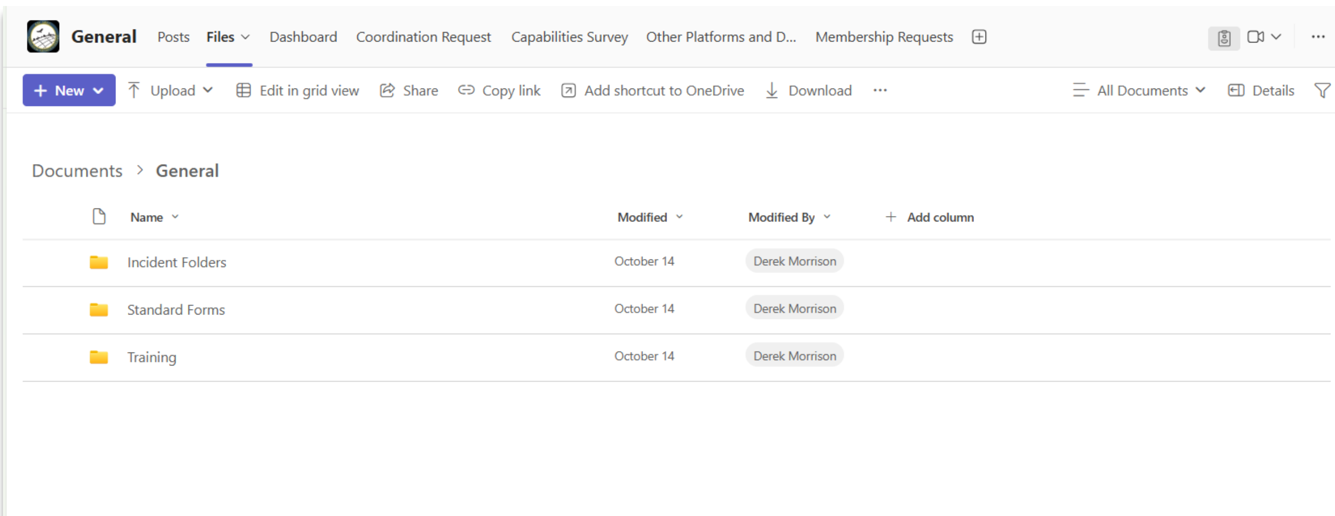


Image 4: Filesharing on Microsoft Teams

Example Files and Folders:

Standard Forms: Includes commonly used documents such as volunteer forms and FEMA tracking sheets.

Incident Folders: Created by administrators at the start of an incident to store meeting minutes, resource lists, and other coordination materials. These folders serve as a reference point for ongoing and future recovery efforts.

Role-Based Access and Permissions

Owners:

- Full control over file management within the team.
- Can create, rename, move, and delete folders and files.
- Can set permissions for members and guests, including restricting editing or download options.
- Responsible for organizing incident folders and ensuring critical documents are available.

Members:

- Can upload, edit, and collaborate on files within the team's channels.
- Can create new folders but cannot change team-wide permissions.
- Ideal for contributing updates, sharing resources, and maintaining documentation during incidents.

Guests:

- Limited access—can view and edit files if permissions allow but cannot create or delete folders.
- Typically restricted from accessing sensitive documents or administrative folders.
- Useful for external partners who need visibility into shared resources without full control.

Tip: Files can be opened directly in Teams or synced to OneDrive for easier offline access. Use version history to track changes and restore previous versions if needed.

Dashboard and Surveys

The platform leverages ArcGIS and Survey123 to enhance situational awareness and streamline data collection.

Survey 123

Survey123 is a form-based data collection tool integrated into Teams, allowing organizations to submit structured information that feeds directly into the ArcGIS dashboards for analysis and coordination.

Role-Based Guidance

- **Owners:**
  - Ensure the survey link is accessible to all team members.
  - Monitor completion and follow up with organizations that have not submitted responses.
  - Validate data accuracy and approve updates to the dashboard.
- **Members:**
  - Complete the survey for their organization or assist others.
  - Update responses as capabilities change during an incident.
  - Use dashboard insights to align resources with requests.
- **Guests:**
  - May complete the survey if representing an external organization.
  - Limited visibility—can submit data but may not access full dashboard analytics.

Tip: Keeping survey responses current ensures accurate resource matching and improves coordination.

Capabilities Survey

The Capabilities Survey is essential for identifying what services and resources each organization can provide. Completing this survey ensures your organization appears on the dashboard and helps match requests with available capabilities.

Accessing the Survey:

- Open the Capabilities Survey tab in Teams or use the embedded Survey123 link.
- The survey typically takes 10–15 minutes to complete.

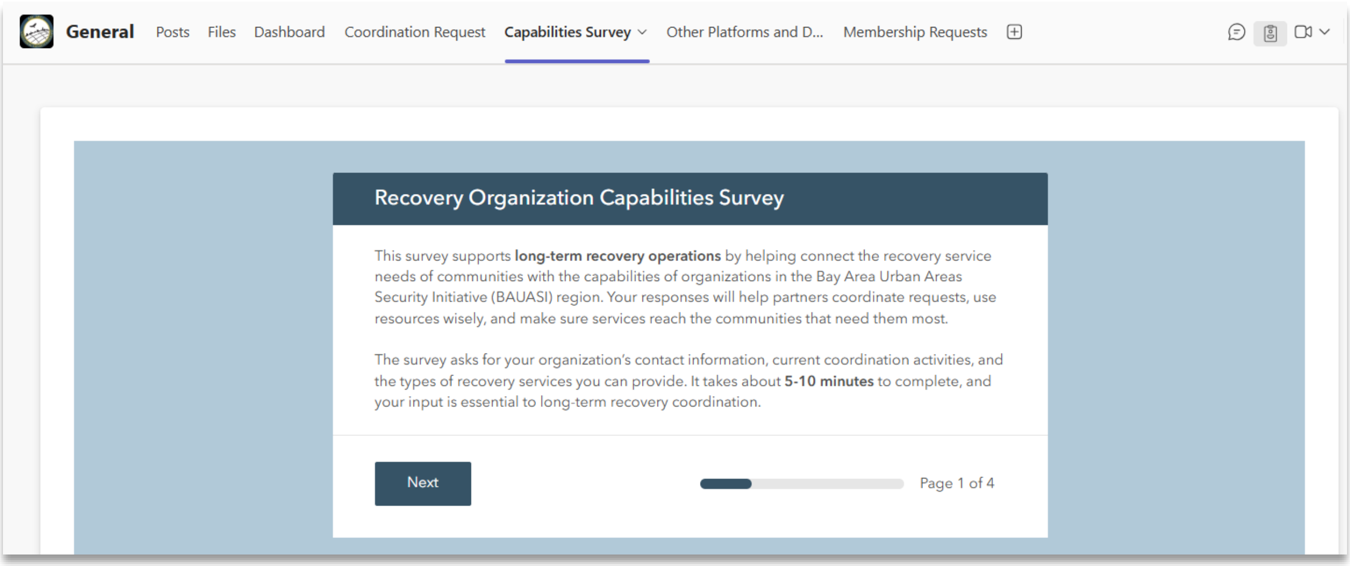


Image 5: Capabilities Survey

Survey Structure

- Page 1 – Organization Details
  - Enter your organization's name, address, and primary contact information. You can also add additional contacts. This information will be visible to anyone with dashboard access.
- Page 2 – Additional Contact Information
  - Confirm or add extra points of contact for coordination purposes.
- Page 3 – Coordination Details
  - Indicate whether you are working with other organizations or government agencies.
- Page 4 – Services Provided
  - Provide details about your capabilities to help match requests with your services:
    - Immediate, short-term, and long-term needs you can meet.
    - Categories of work (e.g., shelter, food distribution, medical support).
    - Location details, including service areas and operational zones.

Requests Survey

The Requests Survey is designed to capture the recovery service needs of communities and organizations during long-term recovery operations. By submitting a request, you help partners match needs with available capabilities, coordinate resources effectively, and ensure services are delivered where they are most needed.

Accessing the Requests Survey

- Open the Coordination Request tab in Microsoft Teams to access the embedded survey.
- Alternatively, use the Survey123 link provided in the platform for direct access.

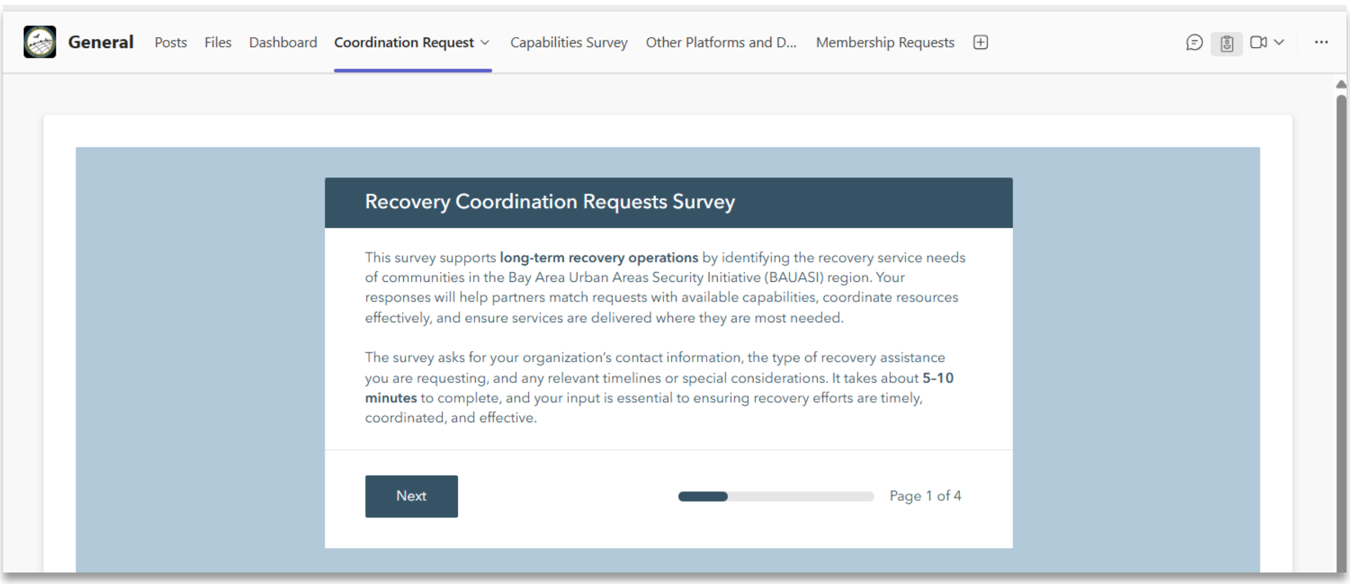


Image 6: Coordination Request Survey

Survey Structure

- Page 1 – Organization Contact Information
  - Provide your organization's name, address, and primary contact details. This ensures responders know who submitted the request.
- Page 2 – Request Details
  - Describe the type of assistance you need (e.g., supplies, personnel, technical support) and specify any relevant timelines or urgent requirements.
- Page 3 – Special Considerations
  - Include any constraints or conditions that may affect service delivery, such as accessibility needs or coordination with other agencies.
- Page 4 – Location and Scope
  - Indicate the geographic area where assistance is required and provide details about the scale of the need (e.g., number of people affected, size of the facility).

Tip: Submitting accurate and complete information helps prioritize and allocate resources efficiently.

Dashboard

The platform's dashboard, powered by ArcGIS, provides a dynamic, visual overview of recovery coordination activities. It integrates real-time data from submitted surveys, allowing users to monitor requests, organizational capabilities, and resource locations across the Bay Area.

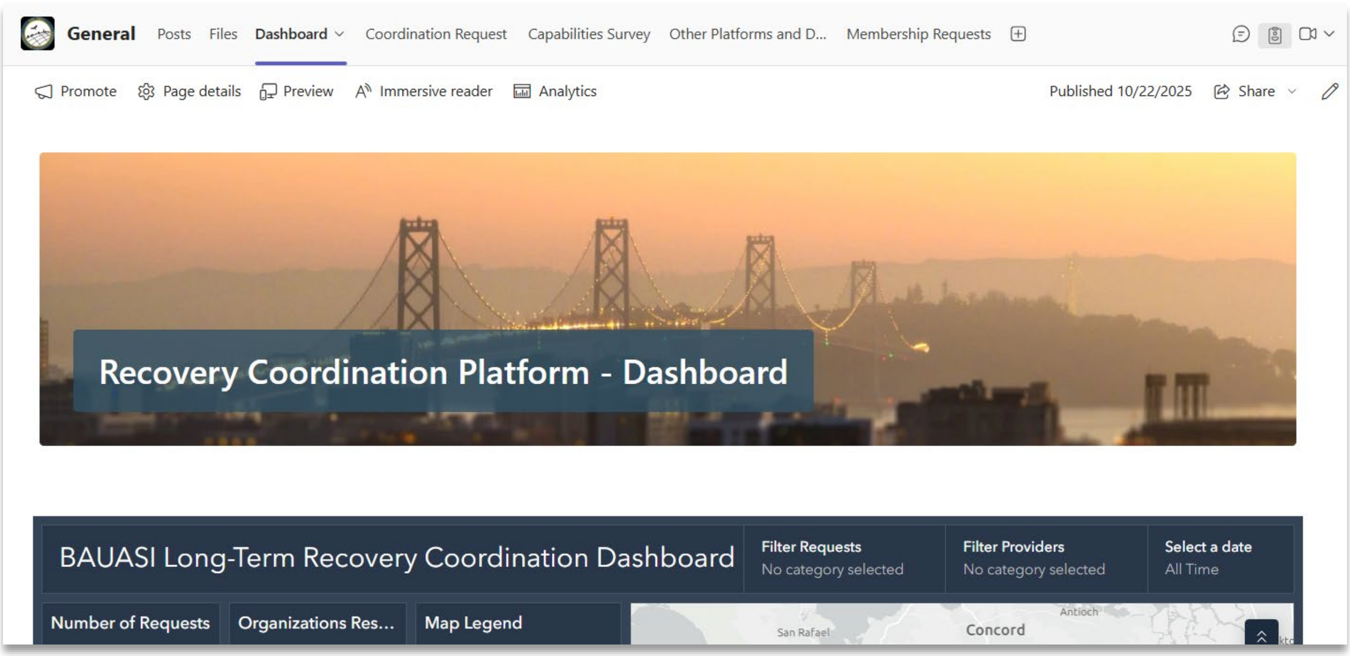


Image 7: Recovery Dashboard

Accessing the Dashboard

- Navigate to the Dashboard tab within Microsoft Teams to view the Recovery Coordination Platform dashboard.
- The dashboard is interactive and updates automatically as new requests and capabilities are submitted via Survey123.

Dashboard Features

1. Request and Capability Summary

- The left panel displays the total number of requests and responding organizations.
- Urgency indicators show how many requests are immediate (within 24 hours), short-term (within 5–7 days), or long-term (within 30 days).

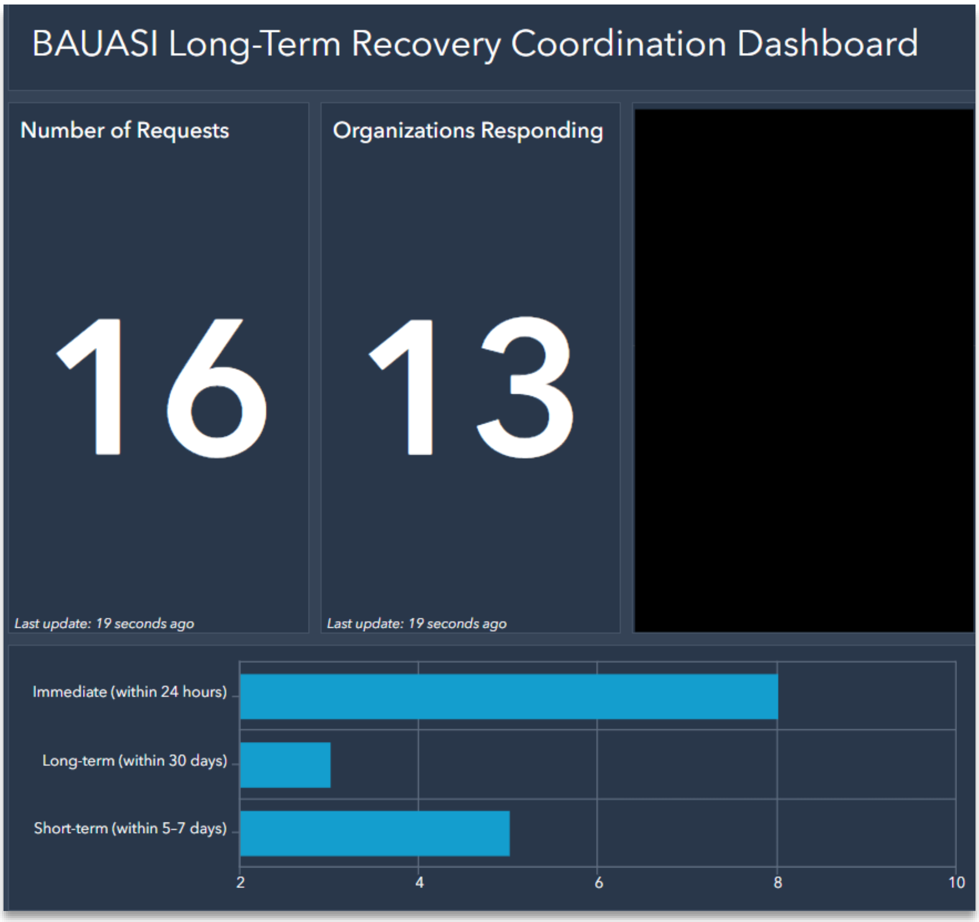


Image 11: Request and Capabilities Indicators

2. Date Filter

- Use the date filter in the top right corner to view requests from the last two weeks or all time.
- This helps focus on recent activity or analyze trends over a longer period.

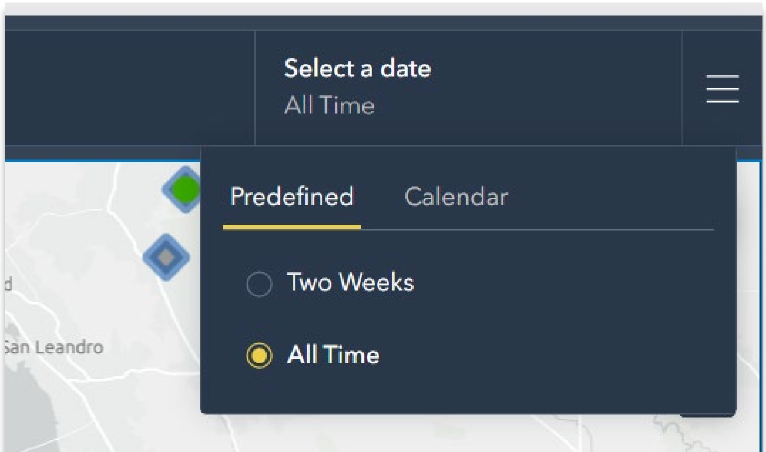


Image 12: Date Filter

3. Interactive Map

- The main section features a live map with color-coded markers:
  - **Blue squares** represent organizations providing services.
  - **Colored circles** indicate active requests, with colors corresponding to urgency.
- Selecting an organization or request on the map or in the table opens a pop-up with detailed information from the relevant survey.

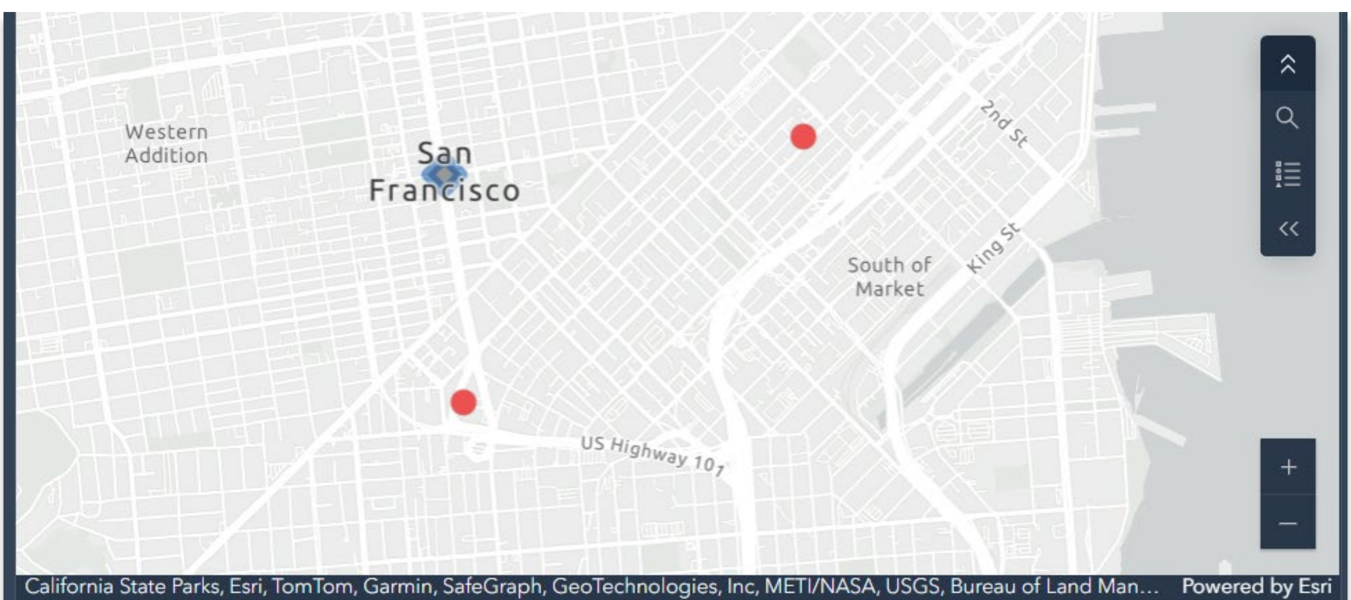


Image 13: San Francisco Capabilities and Requests

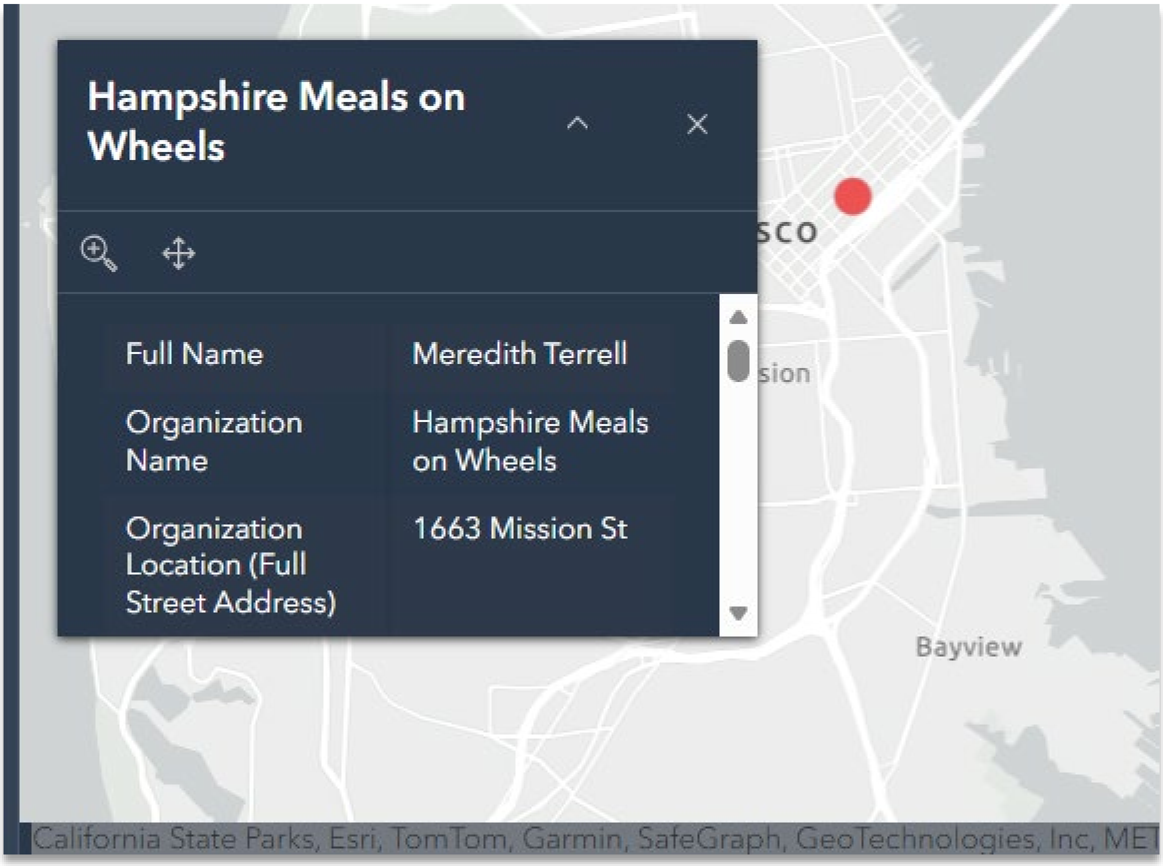


Image 84: Pop-Up Window for an Organization Request

4. Data Export Options

- Users can download dashboard data for further analysis or reporting.
- Export formats include shapefile, CSV, KML, Excel, GeoJSON, and more.
- To export, expand the options menu on the right-hand side and select the desired format.

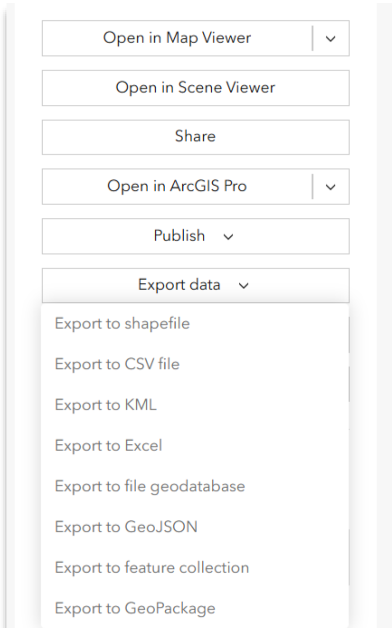


Image 15: Pop-Up Window to Download Data

Map Legend and Pop-Ups

- The map legend clarifies the meaning of each marker and color.
- Clicking on a marker opens a pop-up window displaying organization details, location, and request specifics, as submitted in the surveys.

Image 16: Coordination Map

Tip: Use the dashboard to quickly identify urgent needs, locate available resources, and coordinate responses efficiently. Exporting data can support reporting, planning, and sharing information with external partners.

Troubleshooting

If you encounter issues while using the Dashboard, Surveys, or other features of the Community Coordination Platform, use the following guidance to resolve common problems:

General Access Issues

Cannot log in or access Teams:

- Ensure you are using the correct email address and password.
- Check for any required multifactor authentication steps.
- If you are a new user, confirm that your membership request has been approved by the administrator.

Missing tabs or features:

- Refresh your Teams window or restart the application.
- Verify your role (Owner, Member, Guest) as some features may be restricted based on permissions.
- Contact the platform administrator if you believe you should have access to a specific tab or feature.

Dashboard Problems

Dashboard not loading or displaying data:

- Check your internet connection.
- Make sure you are using a supported browser or the latest version of the Teams app.
- Try clearing your browser cache or restarting Teams.
- If the dashboard still does not load, reach out to the administrator for support.

Map markers or data missing:

- Confirm that recent surveys (Capabilities or Requests) have been submitted and processed.
- Use the date filter to adjust the time range and ensure you are viewing the correct period.
- If data is still missing, notify the administrator to check for data integration issues.

Survey Issues

Unable to submit a survey:

- Ensure all required fields are completed.
- Check for any error messages and follow the instructions provided.
- If the survey is embedded in Teams and not loading, try accessing it via the direct Survey123 link.

Survey responses not appearing on the dashboard:

- Allow a few minutes for data to sync between Survey123 and ArcGIS.
- Confirm that you submitted the survey successfully.
- If responses are still missing, contact the administrator to verify data integration.

Exporting Data

Cannot download dashboard data:

- Make sure you have the necessary permissions to export data.
- Try using a different export format (CSV, Excel, etc.).
- If the export option is not visible, expand the options menu on the right-hand side of the dashboard.

Getting Help

- If you continue to experience issues, reach out to the platform owner or administrator for assistance.
- Provide details about the problem, including screenshots if possible, to help resolve your issue quickly.

Tip: Regularly check for platform updates and review any new guidance or FAQs shared by administrators to stay informed about new features and troubleshooting steps.