ESI® University

WebEOC® Super User Student Manual

Printed in USA.

USERS

The Users Section

Introduction

Instructions in this chapter are performed in the *Users* section of the *Admin* window.

This chapter will cover the following *Users* managers.

- *Users*
- *Positions*
- *Groups*
- *Sessions*

You must be a WebEOC administrator or have appropriate admin profile permissions to perform the functions outlined in this chapter.

The Users Manager

The *Users* manager allows WebEOC administrators to create and edit basic user settings (user names, passwords, permissions, email addresses, etc.) for user accounts. You can also build user reports in the *Users* manager. The *User Activity Report* lists users; their last attempted log-in date and time; and their last successful log-in date and time.

Each user account must be assigned to a position; each position must be assigned to a group; and each group must be assigned to an incident. Without a position, a user cannot log in to WebEOC. Without a group, a user does not have permission to any incidents, and without being assigned to an incident, a user does not have permission to any boards, plug-ins, etc.

Position assignments made in the *Users* manager are automatically applied to the *Positions* manager. Changes made in the *Positions* manager are automatically applied to the *Users* manager. The *Administrative Access Report* shows you which users have full or partial administrative access and which admin managers they have access to.

If you (the WebEOC administrator) provide a position name, position access code (PAC), and your agency's WebEOC URL, users can set up their own accounts. If users will be setting up their own accounts, provide

NOTES

them with the instructions in this section. Users cannot grant themselves WebEOC administrator permissions. User accounts configured as administrators must be created by a WebEOC administrator. Granting users WebEOC administrator privileges through the *Users* manager automatically enables them to perform all administrative functions in WebEOC.

Planning a New User Account

Before creating a user account, you should determine the user's information and permission requirements. Answer the following questions before creating a user account.

- What will be an appropriate user name and password for the user account?
- What position or positions will the user be assigned to? Does the position already exist?
- Will the user be a WebEOC administrator?
- Will the user need to be able to send emails?
- Will multiple users be assigned to the account?

Single-user or Multi-user Accounts

Log-in accounts can be configured as either single- or multi-user. Multi-user accounts allow more than one user to log in using the same user account at any one time. Single-user accounts allow only one person to be logged in to a particular account. If a user logs in to an active single-user account, the active user is logged out.

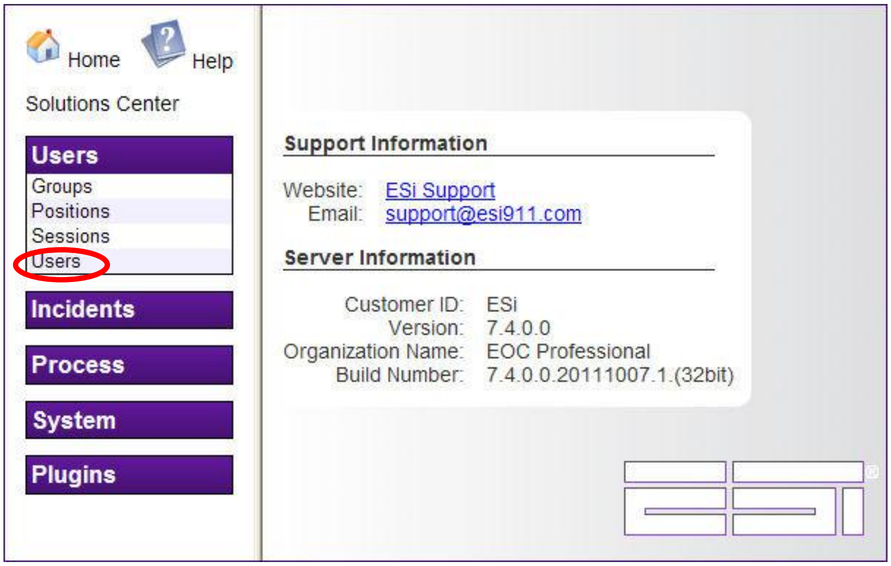
If your account is configured as single user and someone else is logged into that account, when you select the **OK** button, the other user who is involuntarily logged off receives a pop- up message on his or her *Control Panel*. When involuntarily logged off, the logged off user should exit the system (by selecting the *Log Off* button) and contact the WebEOC administrator for assistance.

NOTES

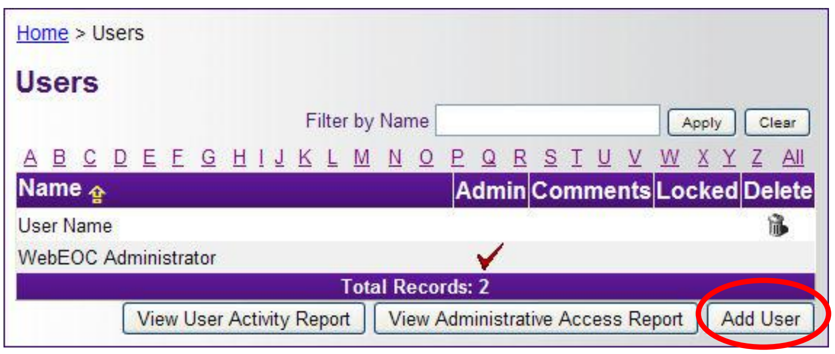
Adding a User Account

To add a new user account, follow the steps below.

1. In the admin manager window, select the **Users** link in the *Users* section.

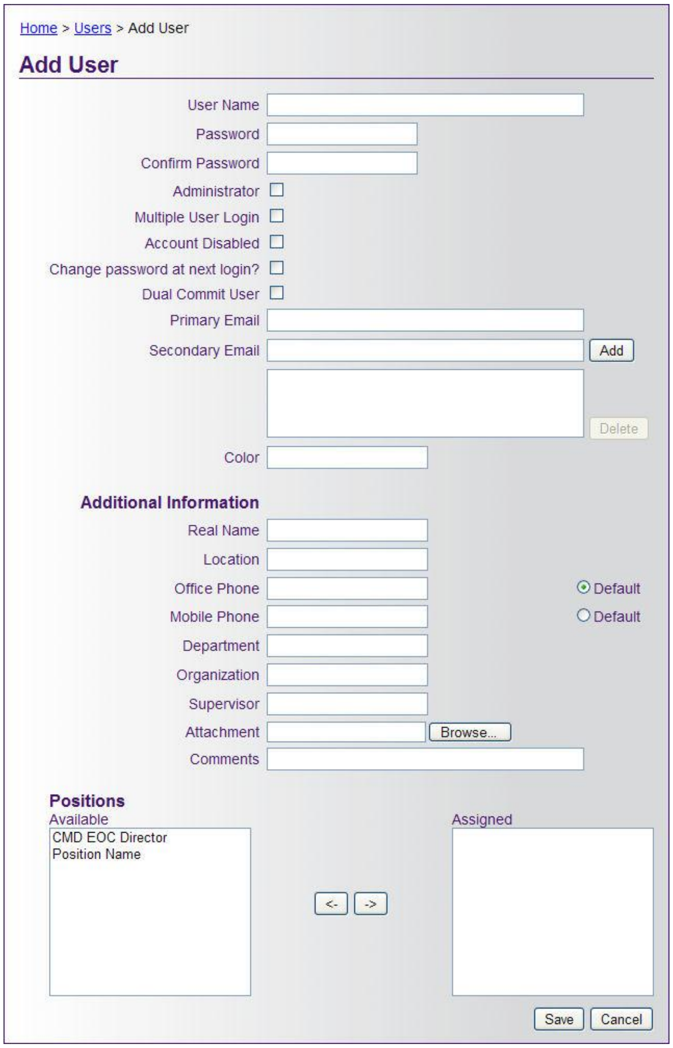


2. In the *Users* window, select the **Add User** button.



NOTES

3. In the *Add User* window, enter the user name the user will use to log in to WebEOC in the *User Name* field.



4. Enter the password the user will use to log in to WebEOC in the *Password* field, and reenter the password in the *Confirm Password* field. If the passwords do not match, a red error will appear next to the *Confirm Password* field. Passwords are case sensitive, are

NOTES

limited to 50 characters, and can contain any character (i.e., alpha- numeric and/or special characters such as a space, #, &, $, etc.). The only exception to this rule is the single quotation mark symbol which, for security reasons, cannot be used in passwords.

5. Select the **Administrator** checkbox to allow the user unrestricted access in WebEOC. The *Administrator* checkbox will not be available for users who do not have WebEOC administrator privileges, even if they have access to the *Users* manager through an admin profile.

Administrator permissions are permanently assigned to the WebEOC administrator system account and cannot be modified.

WebEOC administrator privileges override any permissions set up in the *Admin Profiles* manager.

6. If multiple users will use this account simultaneously, select the **Multiple User Login** checkbox.

If you do not select the *Multiple User Login* checkbox and multiple users use this account, the last user successfully logging in will cause the user currently logged in to be logged out of WebEOC. When this occurs, the user attempting log-in will be asked to confirm if they want to continue the log-in sequence and log off the other user. The user logged out of WebEOC will receive an error message on his *Control Panel*.

7. *Account Disabled* is used to disable an existing account.

8. If you want to force the user to change his password the next time he or she logs in, select the **Change password at next login?** checkbox.

9. If this user account will be used for Dual Commit purposes, select the **Dual Commit User** checkbox. You can select the *Multiple User Login* checkbox for Dual Commit user accounts. See *Chapter 5: The Process Section* for detailed instructions on the Dual Commit feature.

Note: When the *Dual Commit User* checkbox is selected, this user account will not appear in the *Users* drop-down list.

NOTES

10. If the user will need to be able to send emails, enter an **email address** in the *Primary Email* field. See *Chapter 6: The Systems Section* for detailed instructions on how to enable the email feature.

As long as your SMTP server is configured in WebEOC, emails can be sent from within the WebEOC *Messages* plug-in or an email-enabled status board to any external email enabled device. If an email address is not set for a user, the email capability will not be available for that user in the *Messages* plug-in.

11. If the user has a secondary email address, enter the **email address** in the *Secondary Email* field, and select the **Add** button.

Note: An unlimited number of email addresses may be configured for a user. When an email is generated in WebEOC, the message is sent to the primary and any secondary email addresses that have been configured.

12. To assign a background color to a user name, click inside the *Color* field, and when the color palette appears, use the crosshair icon to select the color. You can also enter a color code in the field.

Note: Background colors can be useful to distinguish between user names that are displayed on a status board.

13. In the *Additional Information* section, complete the fields as applicable. Information in this section will populate the *Additional Login Information* window. In the *Attachment* field, you can attach a JPEG, PDF, etc., to this user account.

14. Assign a position to the user account by selecting the **position** from the *Available* list, and selecting the **right arrow** to move the position to the *Assigned* list.

15. When you have completed the *Add User* window, select the **Save** button to save the user account, or select the **Cancel** button to abort the operation.

Editing an Existing User Account

To edit an existing user account, follow the steps below.

1. In the *Users* window, select the **name** of the user account you want to edit from the *Name* column.

NOTES

Note: The *User List* can also be filtered by selecting the letter of the alphabet that corresponds to the first letter in the user's first or last name.

2. Make your changes in the *Edit User* screen.

3. To delete a secondary email address, select the **email address** you want to delete, and select the **Delete** button.

4. To remove an assigned position, select the **position** in the *Assigned* section, and select the **left arrow** to move the position into the *Available* section.

   Note: If you make position changes in the *Users* manager, those changes will automatically be applied to the *Positions* manager.

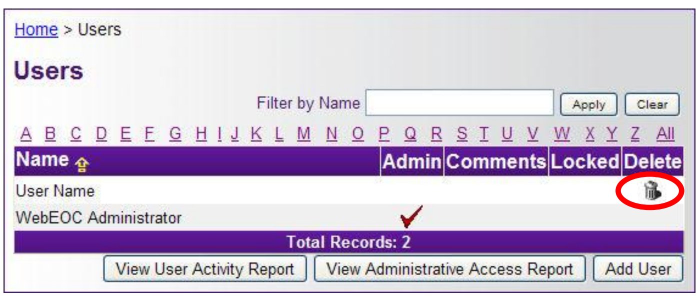
5. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

Deleting a User Account

The WebEOC administrator account cannot be deleted from the system. Deleting a user account will remove the user from the *Groups* and *Positions* managers.

To delete a user, follow the steps below.

1. In the *Users* window, select the **trash can icon** next to the user account you want to delete.



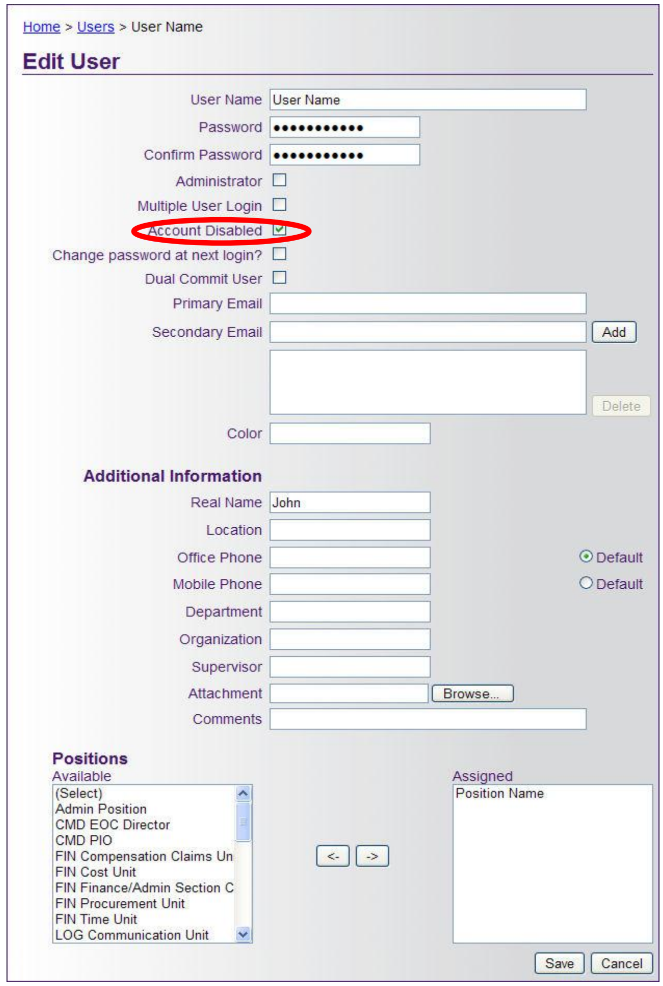
2. When the delete confirmation window appears, select the **OK** button to permanently delete the user account, or select the **Cancel** button to abort the operation.

NOTES

Locking and Unlocking a User Account

Only a WebEOC administrator or a user with appropriate admin profile permissions can lock or unlock a user account.

In "The General Manager" section in *Chapter 6: The System Section*, the administrator can set a limit to the number of times a user can log in unsuccessfully. If a user exceeds the number of log in attempts allowed, his or her user account will be automatically locked and a lock icon will appear next to his name in the *User List* window.



Locking a User Account

To manually lock a user account, follow the steps below.

1. In the *Users* window, select the user account you want to lock.
2. In the *Edit User*, elect the Account Disabled checkbox.
3. Select the Save button to save your changes, or select the Cancel button to abort the operation.

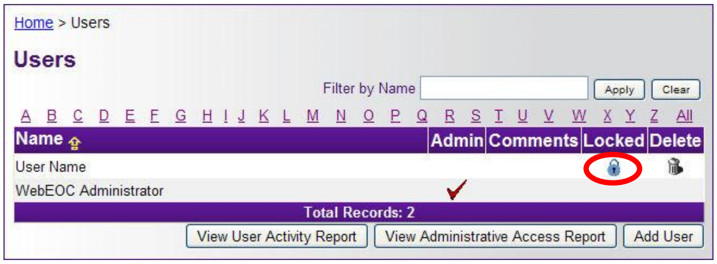
NOTES

Unlocking a User Account

To manually unlock a user account, follow the steps below.

1. Select the **Users** link in the *Users* section of the *Admin* window.

2. Select the **lock icon** next to the user account that has been locked.



3. Select the **OK** button to unlock the user account, or select the **Cancel** button to abort the operation.

NOTES

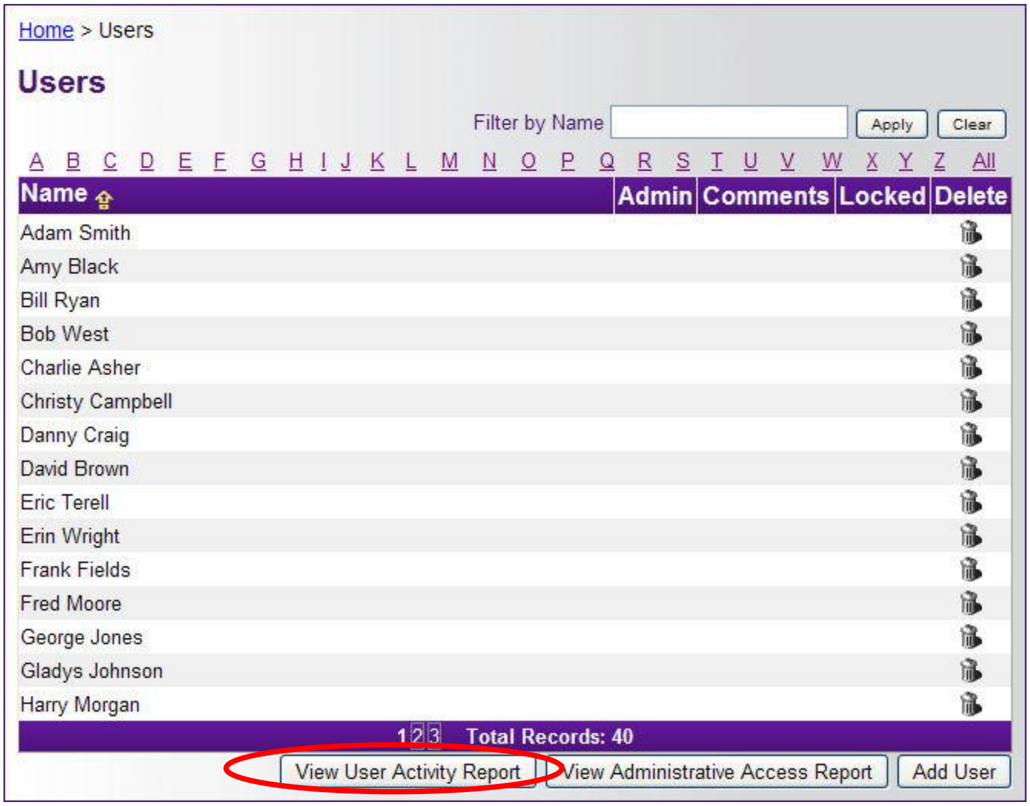
Viewing the User Activity Report

The *User Activity Report* lists users; their last attempted log-in date and time; and their last successful log-in date and time. It is in PDF format. This report assists you in managing user accounts.

To view the *User Activity Report*, follow the steps below.

1. Select the **Users** link in the *Users* section of the *Admin* window.

2. In the *Users* window, select the **View User Activity Report** button.



NOTES

3. The *User Activity Report* will appear as a PDF in a new window. Select the **Print icon** in the PDF toolbar to print the report.

User Activity Report

User Name	Attempted Log In	Successful Log In
User Name	10/20/2011 11:51:37	10/20/2011 16:45:33
Adam Smith	10/20/2011 17:05:34	10/20/2011 17:05:34
Amy Black	10/20/2011 17:05:46	10/20/2011 17:05:46
Bill Ryan	10/20/2011 17:06:10	10/20/2011 17:06:10
Bob West	10/20/2011 17:06:27	10/20/2011 17:06:27
Charlie Asher	10/20/2011 17:06:58	10/20/2011 17:06:58
Christy Campbell	10/20/2011 17:07:12	10/20/2011 17:07:12
Danny Craig	10/20/2011 17:07:23	10/20/2011 17:07:23
David Brown	10/20/2011 17:09:38	10/20/2011 17:09:38
Eric Terell	10/20/2011 17:09:56	10/20/2011 17:09:56
Erin Wright	10/20/2011 17:11:18	10/20/2011 17:11:18
Frank Fields	10/20/2011 17:11:41	10/20/2011 17:11:41
Fred Moore	10/20/2011 17:12:10	10/20/2011 17:12:10
George Jones	10/20/2011 17:12:21	10/20/2011 17:12:21
Gladys Johnson	10/20/2011 17:12:34	10/20/2011 17:12:34
Harry Morgan	10/20/2011 17:12:49	10/20/2011 17:12:49
Helen Lumpkin	10/20/2011 17:13:50	10/20/2011 17:13:51
Irene Carey	10/20/2011 17:14:15	10/20/2011 17:14:16
Iris Smith	10/20/2011 17:14:38	10/20/2011 17:14:38
Jason Wright	10/20/2011 17:14:53	10/20/2011 17:14:53
Jeff Rudder	10/20/2011 17:15:18	10/20/2011 17:15:18
Kelsey Graham	10/20/2011 17:15:48	10/20/2011 17:15:48
Kevin Bacon	10/20/2011 17:16:06	10/20/2011 17:16:06
Leslie Wilbanks	10/20/2011 17:16:23	10/20/2011 17:16:23
Lindsay Willingham	10/20/2011 17:16:41	10/20/2011 17:16:41
Melanie Scott	10/20/2011 17:17:03	10/20/2011 17:17:03
Morgan Nicholson	10/20/2011 17:17:16	10/20/2011 17:17:16
Nick Carter	10/20/2011 17:17:27	10/20/2011 17:17:27
Nicole Lewis	10/20/2011 17:18:09	10/20/2011 17:18:09
Oliver Mock	10/20/2011 17:18:30	10/20/2011 17:18:30
Oscar Busman	10/20/2011 17:19:01	10/20/2011 17:19:01
Payton Marks	10/20/2011 17:19:15	10/20/2011 17:19:15
Peter Jones	10/20/2011 17:19:35	10/20/2011 17:19:35
Richard Reeves	10/20/2011 17:19:45	10/20/2011 17:19:45
Roger Dobbins	10/20/2011 17:19:57	10/20/2011 17:19:57
Scott Knox	10/20/2011 17:32:43	10/20/2011 17:32:43
Steve Sandler	10/20/2011 17:32:57	10/20/2011 17:32:57
Travis McIntire	10/20/2011 17:33:09	10/20/2011 17:33:09
Trent Butler	10/20/2011 17:33:20	10/20/2011 17:33:20
WebEOC Administrator	10/20/2011 17:33:46	10/20/2011 17:33:46

1 / 1

Viewing the Administrative Access Report

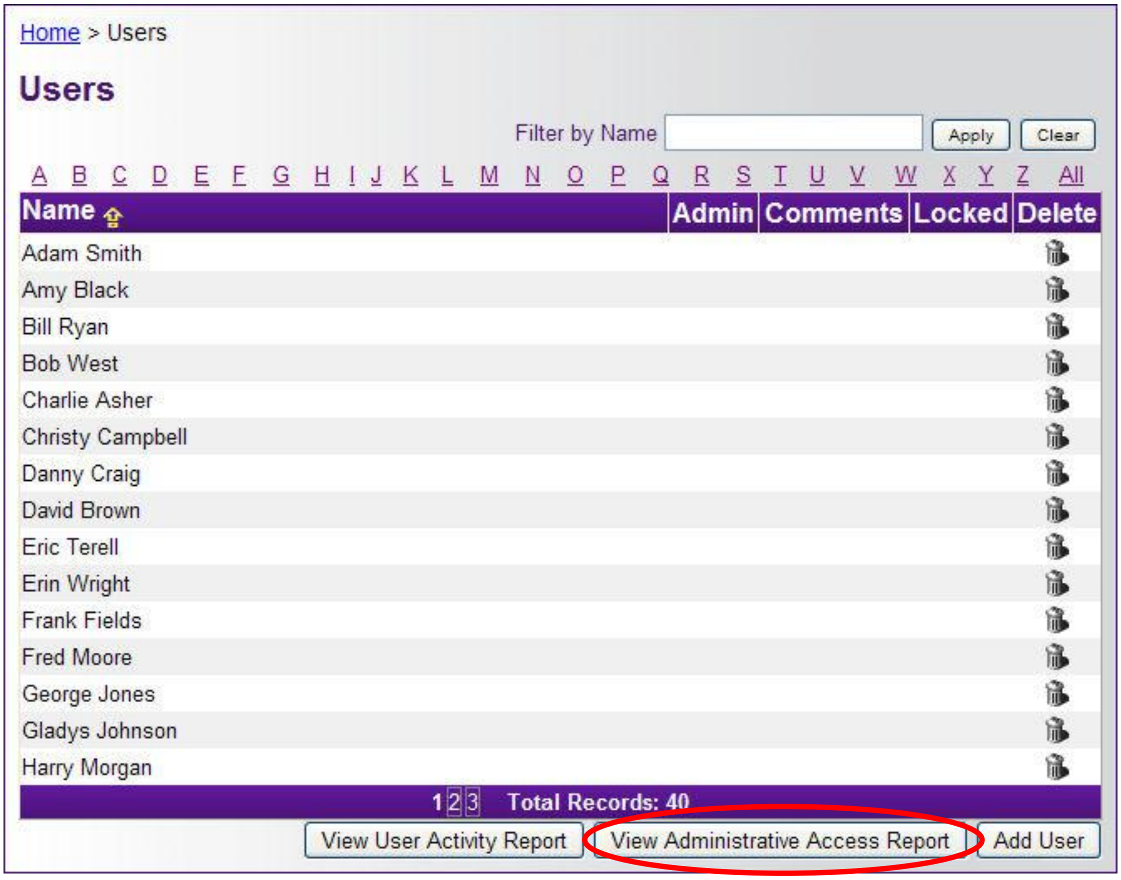
The *Administrative Access Report* shows you which users have full or partial administrative access and which admin managers they have access to. Only users with access to the *User* manager can access this report.

NOTES

To view the *Administrative Access Report*, follow the steps below.

1. Select the **Users** link in the *Users* section of the *Admin* window.

2. In the *Users* window, select the **View Administrative Access Report** button.



NOTES

3. The *Administrative Access Report* will open in a new window. Right-click in the window, and use your browser to print the report.

Administrative Access Report

	Admin Profiles	Archives	Audit Log	Boards	CAP Messaging	Checklists	Dual Commit	File Library	General	Groups	Incidents	Links	Lists	MapTac	Master Views	Menus	Positions	Reporter	Scroller	Sessions	Simulator	Users
Adam Smith	✓		✓	✓	✓	✓	✓	✓			✓	✓		✓		✓	✓			✓	✓	✓
Bob West				✓		✓	✓	✓			✓	✓				✓					✓	
Charlie Asher	✓		✓		✓									✓			✓			✓		✓
Danny Craig	✓		✓	✓	✓	✓	✓	✓			✓	✓		✓		✓	✓			✓	✓	✓
Eric Terell	✓		✓		✓									✓			✓			✓		✓
Frank Fields	✓		✓	✓	✓	✓	✓	✓			✓	✓		✓		✓	✓			✓	✓	✓
Gladys Johnson	✓		✓	✓	✓	✓	✓	✓		✓	✓	✓		✓		✓	✓	✓		✓	✓	✓
Harry Morgan								✓		✓		✓				✓		✓		✓		✓
Jason Wright								✓		✓		✓				✓		✓		✓		✓
Jeff Rudder	✓		✓		✓									✓			✓			✓		✓
John Redmond	✓		✓		✓									✓			✓			✓		✓
Kelsey Graham								✓		✓		✓				✓		✓		✓		✓
Kevin Bacon	✓		✓		✓									✓			✓			✓		✓
Lindsay Willingham				✓		✓	✓	✓			✓	✓				✓					✓	
Melanie Scott								✓		✓		✓				✓		✓		✓		✓
Morgan Nicholson				✓		✓	✓	✓		✓	✓	✓				✓		✓		✓	✓	✓
Nicole Lewis				✓		✓	✓	✓			✓	✓				✓					✓	
Oscar Busman	✓		✓	✓	✓	✓	✓	✓		✓	✓	✓		✓		✓	✓	✓		✓	✓	✓
Richard Reeves	✓		✓	✓	✓	✓	✓	✓		✓	✓	✓		✓		✓	✓	✓		✓	✓	✓
Steve Sandler								✓		✓		✓				✓		✓		✓		✓
Sue Andrews	✓		✓	✓	✓	✓	✓	✓			✓	✓		✓		✓	✓			✓	✓	✓
Travis McIntire	✓		✓		✓									✓			✓			✓		✓
Trent Butler				✓		✓	✓	✓		✓	✓	✓				✓		✓		✓	✓	✓
User Name *	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
WebEOC Administrator *	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

* Denotes full administrator

NOTES

MASTERVIEWS

The Master Views Manager

In WebEOC, organizations can track individual incidents or combine multiple incidents for viewing in a common master view. Once configured by an administrator in the *Master Views* manager, a user logged in to the master view can view the data from all sub-incidents together or on a per incident basis by selecting the appropriate incident filter on each board display. The ability to view the master view, along with its sub-incidents, is available only to those users with the appropriate group permissions.

The option to track multiple incidents simultaneously yet separately, or rolled up into master views, means that a local EOC can track their own ongoing emergency while a district EOC

NOTES

combines several local incidents into a master view, and at the same time the state EOC could have a master view of all regional incidents. Each tier's information can have a different level of detail based on the information requirements for each organization.

Users select which incident or master view to participate in when logging in to WebEOC. Master Views are not themselves incidents; instead they are a view of information from selected incidents. Incidents are archived to and retrieved from the database on a per incident basis. If a member incident (sub-incident) of a master view is archived, all information related to the archived incident is removed from all boards and plug-ins in the master view when displays next refresh.

Logging in to a Master View

Master Views and assigned sub-incidents are easily identified when logging in to WebEOC.

- Master views and incidents that have not been assigned to a master view are displayed left-justified in the *Incident* drop-down list.

- Sub-incidents assigned to master views are grouped together immediately under the master view and preceded by three short dashes.

- If an incident is assigned to more than one master view, it will appear under each master view to which it is assigned.

- A master view with no assigned sub-incidents will not appear in the login window.

NOTES

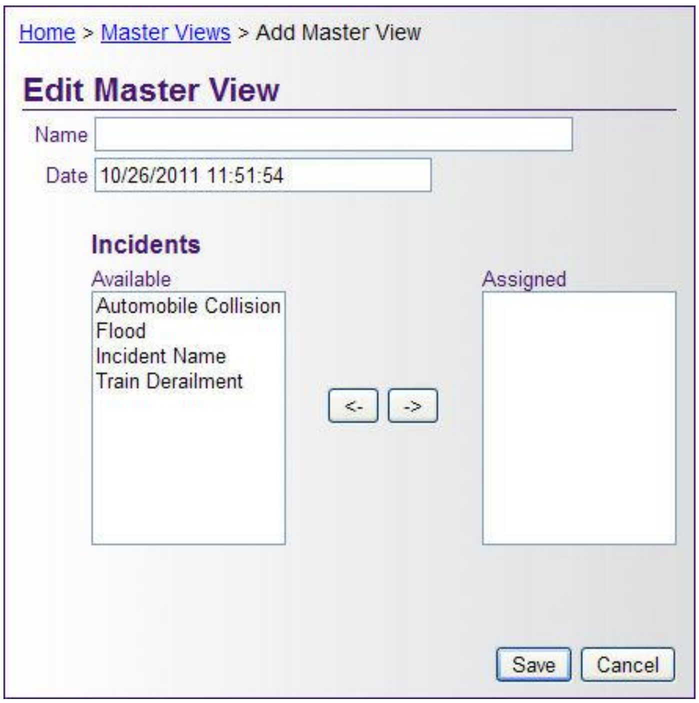
Adding a Master View

To create a new master view, follow the steps below.

1. Select the **Master Views** link in the *Incidents* section of the *Admin* window.

2. Select the **Add Master View** button in the *Master Views* window.

3. Enter a **name** for the master view in the *Name* field.



NOTES

4. The date is automatically set to the current date and time. If you want to change the date, delete the text, and enter a new **mm/dd/yyyy hh:mm:ss** (month, day, year, hour, minutes, and seconds).

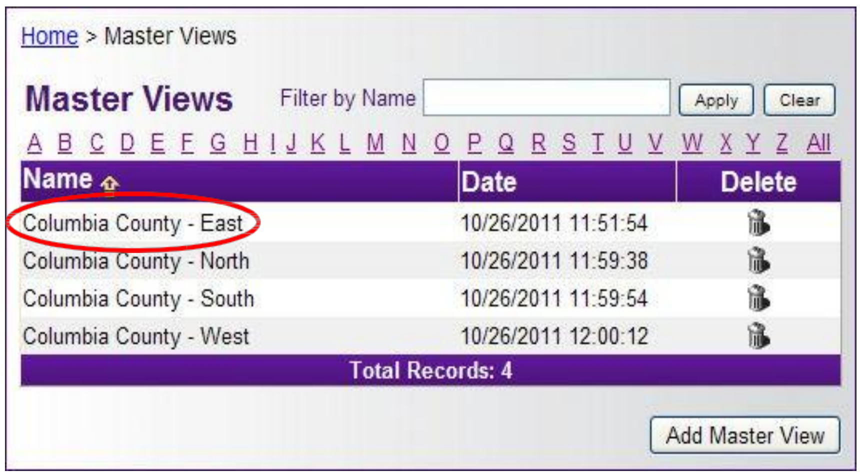
5. Select the **incidents** from the *Available* list that you want to assign to the master view, and select the **right arrow** to move the incidents to the *Assigned* list.

Any changes you make to incident assignments in the *Master Views* manager will automatically update in the *Incidents* manager.

6. Select the **Save** button to create the master view, or select the **Cancel** button to abort the operation.

Editing a Master View

To edit a master view, follow the steps below.



1. Select the **Master Views** link in the *Incidents* section of the *Admin* window.

2. Select the **name** of the master view you want to edit from the *Master Views* window.

3. Make your changes in the *Edit Master View* window.

4. Select the **Save** button to save your changes, or select the **Cancel** button to abort the operation.

NOTES

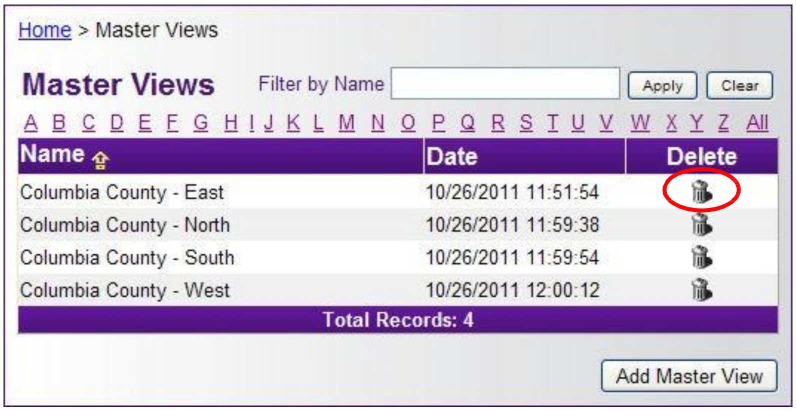
Deleting a Master View

Deleting a master view does not delete the incidents.

To delete a master view, follow the steps below.

1. Select the **Master Views** link in the *Incidents* section of the *Admin* window.

2. Select the **trash can icon** next to the name of the master view to be deleted.



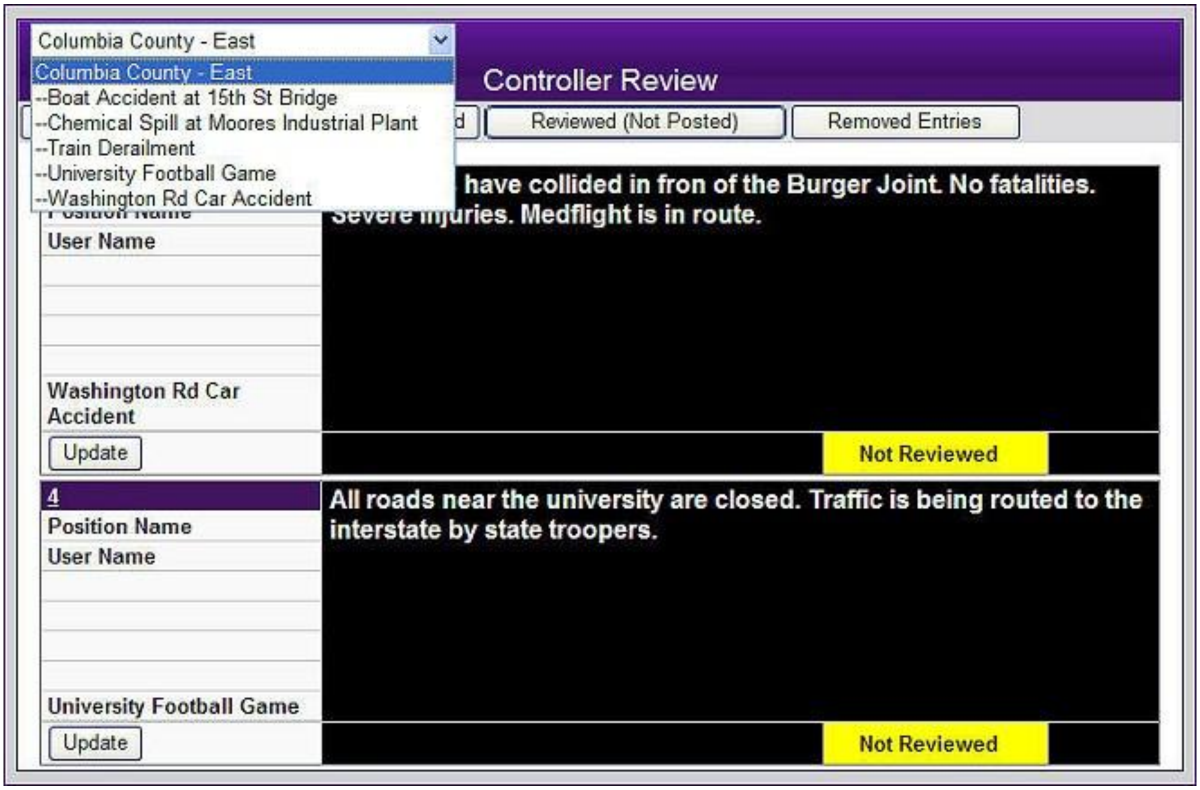
3. When the delete confirmation dialog box appears, select the **OK** button to delete the master view, or select the **Cancel** button to abort the operation.

Managing a Master View

When status board entries from multiple incidents are viewed collectively in a master view, a filter drop-down list will be added in the upper left corner of each board.

To display entries for an individual incident in the master view, select the incident from the filter drop-down list. The board will refresh and display only those entries related to the incident selected.

NOTES



Note: You can design or modify a board to display the name of the incident next to each entry. This is done in the *Advanced Board Editor* by including the system field named "incident" in the board view. A board configured in this fashion and displayed through a master view enables users to easily relate each entry to its respective incident. See *Chapter 8: Basic Board Building* for detailed instructions on modifying boards.

NOTES

Information is entered, updated, and managed from a master view in much the same way as users do when logged into an individual incident. Like board master views, the input view contains an incident drop-down list when logged in to a master view. Select the incident from the drop-down list, and complete the data or settings. Information is posted and recorded to the incident selected from the list.

If only one sub-incident is assigned to the master view, the incident drop-down list will not appear in the input view or display view. It is assumed that all data will be associated with the single sub-incident.

When updating board entries in a master view, the incident drop-down list will not appear in the input view. The incident was determined when the entry was initially entered.

NOTES

REPORTER

The Reporter Manager

In addition to real-time access to emergency information, WebEOC provides extensive information retrieval and reporting capabilities. Agencies can generate an unlimited number of preformatted or *ad hoc* reports based on individual status boards. Preformatted reports can be added as a link to the *Control Panel*.

Use the *Reporter* manager if:

- You need greater filtering capabilities than are present in the *Archives* manager,
- You need to sort archived data, or
- You want the information presented in a report format.

An unlimited number of user-defined reports can be developed for both default and locally developed status boards.

Two types of board reports are available: *Standard* and *Custom*. The *Standard Report* is built using standard *Reporter* manager tools. The *Custom Report* is built using HTML and can be developed in an external editor, such as Adobe® Dreamweaver®, and then pasted into the *Reporter* manager.

NOTES

A multi-board incident report can be generated through the *Incident* manager.

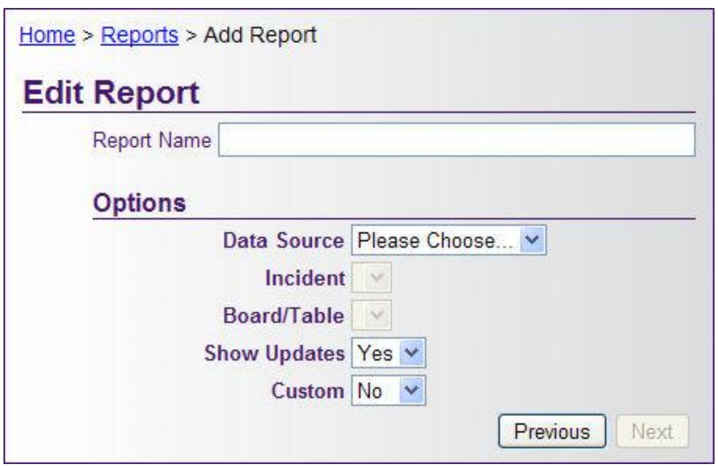
Creating a Standard Board Report

To create a standard board report, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the *Admin* window.

2. Select the **Add Report** button.

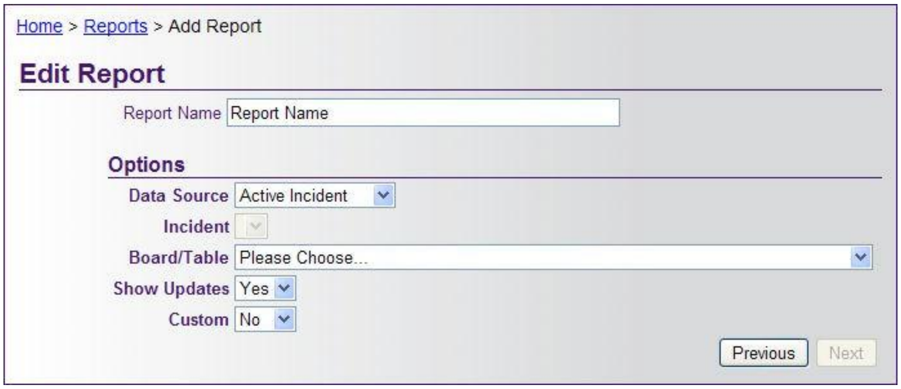
3. Enter a **name** for the report in the *Report Name* field.



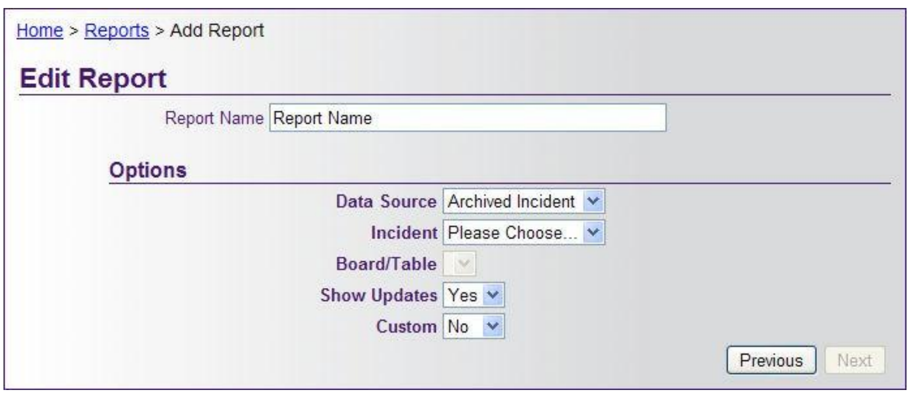
NOTES

4. From the *Data Source* drop-down list, select either **Active Incident** or **Archived Incident**.

5. If you select *Active Incident*, select the **board** or **table** from the *Board/Table* drop-down list. This is the board or table that will be used to generate the report.



6. If you select *Archived Incident*, select the **incident** from the *Incident* drop-down list. This is the incident that will be used to generate the report.



NOTES

7. From the *Show Updates* drop-down list, select either **Yes** or **No**. If *Yes* is selected, the report will include all updates that have been made to an entry. When updates are included, the initial entry and any updates made will appear in the report. If *No* is selected, the report will include only the last update made to an entry.

8. From the *Custom* drop-down list, select **No**. This feature is detailed in the *Adding a Custom (HTML) Report* section in this chapter.

9. Select the **Next** button to continue to the *Edit Report Fields* window, or select the **Previous** button to return to the *Reports* window.

10. The *Edit Report Fields* window allows you to add the data fields that will be included in the report. Select a **field** from the *Available Fields* drop-down list, and select the **Add Field** button. The *Available Fields* list is populated from the board you selected in the *Edit Report* window.

Note: If this is an existing report and the board/table was changed, you must remove and/or add data fields corresponding to the board currently selected.

NOTES

11. Repeat step 10 for each data field you want to include in the report. After adding the fields, you can change the order the fields will display in the report by selecting the **field**, and selecting the **Up** or **Down** button. To delete a field, select the **field**, and select the **Remove** button.

12. When you have finished selecting and ordering the data fields, select the **Next** button to continue to the *Edit Report Sort* window, or select the **Previous** to return to the *Edit Report Fields* window without saving your changes.

13. Use the *Edit Report Sort* window to establish the parameters on which entries will be sorted and displayed in the report. Single or multiple parameters may be configured for the sort protocol.

14. Select the **field** from the *Available Fields* drop-down list. The list is based on the board specified for the report in *Edit Report* window.

Sort criteria using fields that have been configured as [TEXTAREA] in the *Boards* manager are not supported, and if configured will not be executed.

Note: If this is an existing report and the board/board table was changed, you must remove and/or add data fields corresponding to the board currently selected.

NOTES

15. Select either **ASC** for ascending or **DESC** for descending from the drop-down list.

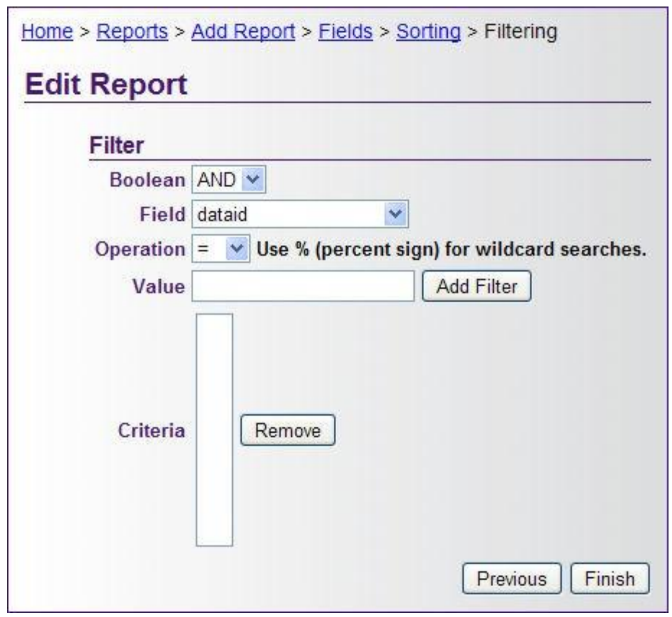
16. Select the **Add Sort** button.

17. Repeat the steps for each rule added. As each rule is configured, it is added to the *Displayed Fields* pane.

To remove a parameter, select the **parameter** in the *Displayed Fields* pane, and select the **Remove** button.

18. After the sort parameters have been set, select the **Next** button to continue to the *Edit Report Filter* window, or select the **Previous** button to return to the *Edit Report Fields* window without saving your changes.

19. The *Edit Report Filter* window allows you to create a single query using one or more criteria to filter board entries included in the final report. The last filter configuration for an existing report is displayed in the *Edit Report Filter* window. If this is an existing report, and the board/board table was changed, you must remove and/or add the corresponding data fields to the board currently selected.



20. Select **AND** or **OR** from the *Boolean* drop-down list, and select the **field** from the *Field* drop-down list. Where multiple parameters are configured for the query, select **AND** or **OR** for the second and subsequent parameters. If **AND/OR** is not specified, *AND* will automatically be appended to the second and subsequent parameters.

Note: See the *Query Option Table* at the end of this section for Boolean descriptions.

NOTES

21. Select =, <, >, <>, or **LIKE** from the *Operation* drop-down list.

22. Enter a **value** in the *Value* field, and select the **Add Filter** button.

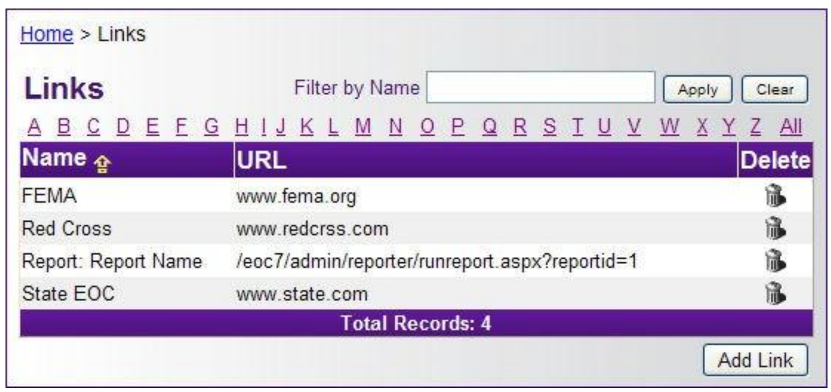
23. The query will appear in the *Criteria* pane. To delete a filter parameter, select the **parameter** in the *Criteria* pane, and select the **Remove** button.

24. After filter queries have been set, select the **Finish** button to save the report parameters, or select the **Previous** button to return to the *Edit Report Sort* window without saving your changes.

25. To create a link for the report, select the **Create Link** icon next to the report in the *Reports* window.

The link is created and added to the *Links* manager and will also appear in the *Available* list in the *Groups* and *Menus* managers.

After you create the report, you need to add the report link to each group profile or menu as applicable.



NOTES

Query Option Table

If all board entries are to be included in the report, leave the *Criteria* pane blank. A combination of criteria may be configured using simple query statements. Queries are constructed based on the parameters (*Boolean* and *Operation*) selected. The table below describes each query parameter.

Symbol	Query Option
AND	"AND" is used in multi-query statements to specify that entries must meet all parameters linked by "AND" in order to be included in the report.
OR	"OR" is used in multi-query statements to specify that entries meeting any parameter linked by "OR" will be included in the report.
LIKE	The query result will include matches containing the parameter entered in the *Value* field. This is comparable to a "contains" query. The wildcard (%) can be used with a "like" query.
=	The query result will include entries that exactly match the parameter entered in the *Value* field.
<	The query result will include matches that are less than the parameter entered in the *Value* field (numerically or alphabetically).
>	The query result will include matches that are greater than the parameter entered in the *Value* field (numerically or alphabetically).
<>	The query result will exclude those entries matching the parameter entered in the *Value* field.

NOTES

Running a Board Report

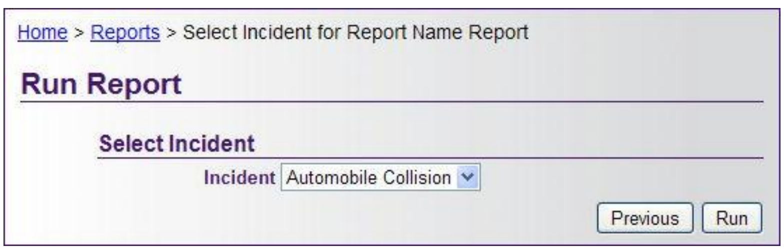
To run a report using the *Reporter* manager, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the *Admin* window.

2. Select the **Run** icon next to the report to be created.

3. If you are running a report for an archived incident, the report is automatically generated and displayed in a report preview window. Skip to step 5. If you are running a report for an active incident, continue to step 4.

4. In the *Run Report* window, select the **incident** from the *Incident* drop-down list.



5. Select the **Run** button to preview the report, or select the **Previous** button to return to the *Reports* window.

6. When the report opens, select the **Print Report** link to generate a hardcopy, or select the **Close Window** link to close the report preview window.

NOTES

Adding a Custom (HTML) Report

Custom board reports developed in an external HTML editor or WebEOC's basic board builder can be imported directly into the *Reporter* manager. The *Reporter* manager employs HTML tags in addition to several special tags for controlling data to be displayed. A user must know HTML standards to fully understand the functionality of special HTML tags supported for the *Reporter* manager. See *Chapter 9: HTML Conventions* for detailed instructions on using tags.

To add a custom report, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the *Admin* window.

2. Select the **Add Report** button.

3. Enter a **name** for the report in the *Report Name* field.

NOTES

4. From the *Data Source* drop-down list, select either **Active Incident** or **Archived Incident**.

5. If you selected *Active Incident*, select the **board** or **table** from the *Board/Table* drop-down list. This is the board or table that will be used to generate the report.

6. If you selected *Archived Incident*, select the **incident** from the *Incident* drop-down list. This is the incident that will be used to generate the report.

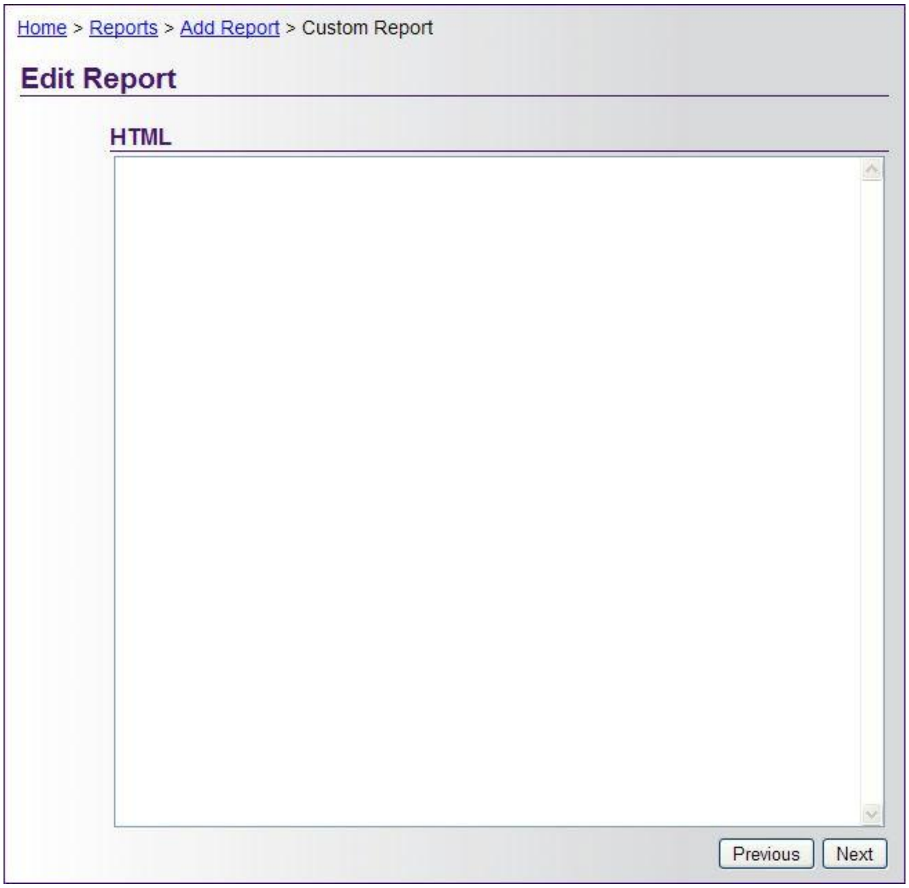
7. From the *Show Updates* drop-down list, select either **Yes** or **No**. If *Yes* is selected, the report will include all updates that have been made to an entry. When updates are included, the initial entry and any updates made will appear in the report. If *No* is selected, the report will include only the last update made to an entry.

8. From the *Custom* drop-down list, select **Yes** from the *Custom* drop-down list.

9. Select the **Next** button to continue building the report, or select the **Previous** button to return to the *Reports* window.

NOTES

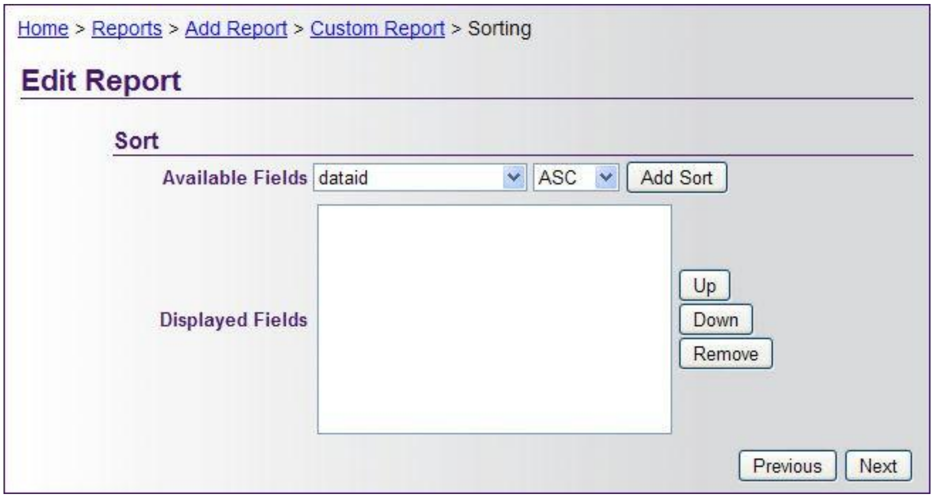
10. In the *Edit Report* window, paste the **code** from your HTML editor into the *HTML* text field.



11. Select the **Next** button to continue building the report, or select the **Previous** button to return to the *Edit Report* window.

NOTES

12. Use the *Edit Report Sort* window to establish the parameters on which entries will be sorted and displayed in the report. Single or multiple parameters may be configured for the sort protocol.



13. Select the **field** from the *Available Fields* drop-down list. The list is based on the board specified for the report in *Edit Report* window.

Sort criteria using fields that have been configured as [TEXTAREA] in *Boards* manager are not supported, and if configured will not be executed.

Note: If this is an existing report and the board/board table was changed, you must remove and/or add data fields corresponding to the board currently selected.

14. Select either **ASC** for ascending or **DESC** for descending from the drop-down list.

15. Select the **Add Sort** button.

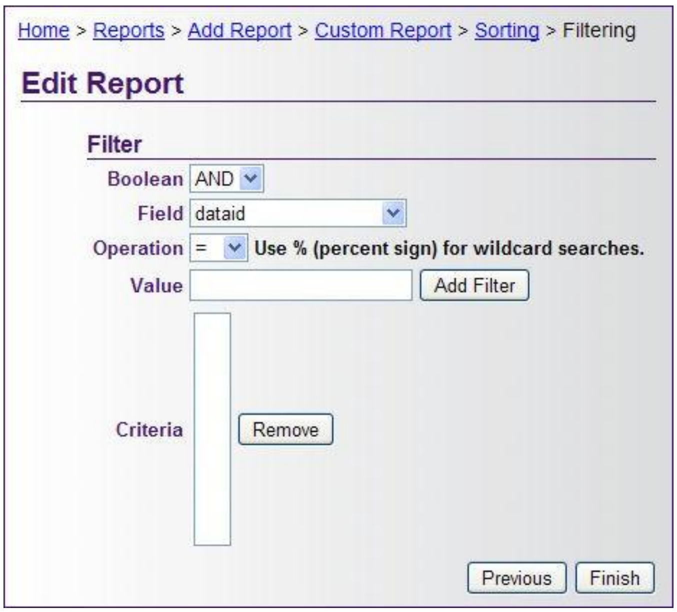
16. Repeat the steps for each rule added. As each rule is configured, it is added to the *Displayed Fields* pane.

NOTES

To remove a parameter, select the **parameter** in the *Displayed Fields* pane, and select the **Remove** button.

17. After the sort parameters have been set, select the **Next** button to continue to the *Edit Report Filter* window, or select the **Previous** button to return to the *Edit Report Fields* window without saving your changes.

18. Select **AND** or **OR** from the *Boolean* drop-down list, and select the **field** from the *Field* drop-down list. Where multiple parameters are configured for the query, select **AND** or **OR** for the second and subsequent parameters. If **AND/OR** is not specified, *AND* will automatically be appended to the second and subsequent parameters.



Note: See the *Query Option Table* in this chapter for Boolean descriptions.

19. Select =, <, >, <>, or **LIKE** from the *Operation* drop-down list.

NOTES

20. Enter a **value** in the *Value* field, and select the **Add Filter** button.

21. The query will appear in the *Criteria* pane. To delete a filter parameter, select the **parameter** in the *Criteria* pane, and select the **Remove** button.

22. After filter queries have been set, select the **Finish** button to save the report parameters, or select the **Previous** button to return to the *Edit Report Sort* window without saving your changes.

Deleting a Board Report

To delete a board report, you must delete the report in the *Reporter* manager and delete the link to that report in the *Links* manager.

To delete a board report, follow the steps below.

1. Select the **Reporter** link in the *Incidents* section of the *Admin* window.

2. Select the **trash can icon** next to the report you want to delete.

3. When the delete confirmation dialog box appears, select the **OK** button to delete the report, or select the **Cancel** button to abort the operation.

Note: After you have deleted a report in the *Reporter* manager, you must delete the report from the *Links* manager. See *Chapter 5: The Process Section* for detailed instructions on deleting links.

NOTES

ESi® University
8601 Dunwoody Place
Suite 126
Atlanta, GA 30350
678-680-4970
1-866-937-4911
www.ESi911.com
ESiU@ESi911.com