



Cal OES

GOVERNOR'S OFFICE
OF EMERGENCY SERVICES



WEBEOC ARCHIVE USER GUIDE

REVISION HISTORY

Version	Change Date	Author	Comments
1.0	05/19/2025	Smitha Rebello	Created Initial Draft
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TABLE OF CONTENTS

WebEOC Archive User Guide	1
REVISION HISTORY	2
Table of Contents	3
1 Introduction	5
1.1 User Permissions Matrix.....	5
1.2 Glossary	5
2 Getting Started.....	6
2.1 Accessing the Boards.....	6
2.2 Internal Users: Live/Production Site.....	7
2.3 Community Portal Users.....	8
3 Search Bars in the WebEOC Archive.....	10
3.1 Header Search Bar	10
3.1.1 Search Examples.....	10
3.2 List View Search Bar.....	11
4 List Views: Creating, Editing and Saving.....	11
4.1 Internal View.....	11
4.1.1 Printing a List View	12
4.1.2 Exporting a List View	12
4.2 Community View	13
4.3 Filter Logic.....	13
5 Reports Board	14
5.1 Accessing a Report.....	14
5.1.1 Internal Users	15
5.1.2 Community Users	16
5.2 Creating a New Report.....	16
5.2.1 Internal Users	16
5.2.1.1 Saving a Report.....	18
5.2.2 Community Users	19
5.3 Report Access and Permissions	19
5.3.1 Internal Users	19
5.3.2 Community Users	19

6	Application Support	19
6.1	Resource Library	19
6.1.1	Internal User Resource Library	19
6.1.2	Community User Resource Library	19
6.2	Support Information	19

1 INTRODUCTION

WebEOC Archive is a static set of records with many similarities to Cal EOC360, its parent application. The features described in this Guide work the same way across any application you have access to as a Cal EOC360 and WebEOC Archive user.

All applications in WebEOC Archive share a common header and set of action buttons. For more information about the navigation icons and action options, check out our Cal EOC360 User Guide.

WebEOC Archive contains selected data from our CalEOC (WebEOC) system from 2019 to 2024. Additional archived data is available for this period; also an older archived database covering 2014 to 2018. Data not found in WebEOC Archive are available by request to RSI.support@caloes.ca.gov.

1.1 USER PERMISSIONS MATRIX

		Applications/Boards								
		Incidents	Initial Damage Estimate (IDE)	Proclamation	Significant Event	Regional Event Summary (RES)	After Action Report (AAR)	EMMA	Resource Request System (RRS)	
Personas	Community	Operational Areas (OA)	Read Only	Read Only	Read Only	Read Only	No Access	Read Only	Read Only	Read Only
		EMMA Coordinators	Read Only	Read Only	Read Only	Read Only	No Access	Read Only	Read Only	Read Only
		ESF Staff	Read Only	Read Only	Read Only	Read Only	No Access	Read Only	Read Only	Read Only
	Internal Users	SOC	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only
		AAR Admin	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only
		Internal EOC Admin	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only
		Internal Recovery	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only
		Warning Center	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only	Read Only

1.2 GLOSSARY

Terms and phrases that will be helpful in understanding this user guide and WebEOC Archive:

Application In the Salesforce Engage platform, applications are sets of user capabilities. The WebEOC Archive is an application for accessing our past data archives. Cal EOC360 and Resource Request Systems are the current applications for managing and documenting incidents, and for requesting resources (respectively). The WebEOC Archive application includes the following components:

- Archived Incidents
- Archived Initial Damage Estimate (IDE)
- Archived Regional Event Summary
- Archived Proclamation
- Archived Significant Event
- Archived EMMA Request
- Archived Resource Request
- Archived Task
- Archived After Action Report (AAR)

Board	One of the nine components that make up the WebEOC Archive suite. (Interchangeable with “module”).
Community User	Any user who, in general, is connected to an Operational Area or State Agency.
Internal User	Any user who, in general, is a member of Cal OES.
List	A collection of records within a single board/module.
Module	One of the nine components that make up the WebEOC Archive suite. (Interchangeable with “board”).
Record	Any individual data set in a list: an incident, a proclamation, a resource request, etc.

2 GETTING STARTED

2.1 ACCESSING THE BOARDS

There are two types of interfaces (portals) available for WebEOC Archive:

- Internal interface (portal) for Internal Cal OES employees
- Community interface (portal) for Community Users
 - Operational Areas (OA’s)
 - State Agencies / Emergency Support Functions (ESF’s)

Each interface (portal) has two environments with different URLs for each:

- Live
 - Internal Live Environment: <https://caloes.lightning.force.com>
 - Community Live Environment: <https://engage.caloes.ca.gov>
- Training
 - Internal Training Environment: <https://caloes--training.sandbox.lightning.force.com>
 - Community Training Environment: <https://caloes--training.sandbox.my.site.com>

Once logged in, both environments’ functions are identical.

2.2 INTERNAL USERS: LIVE/PRODUCTION SITE

- Navigate to <https://caloes.lightning.force.com>
- Click the [Log in with CalOES Single Sign On](#) button
- The title next to the 9-dot App Launcher menu indicates the application you are currently in.



Figure 2 - Internal user 9-dot menu example

- If you are not in WebEOC Archive, use the 9-dot App Launcher menu to search for and select WebEOC Archive.

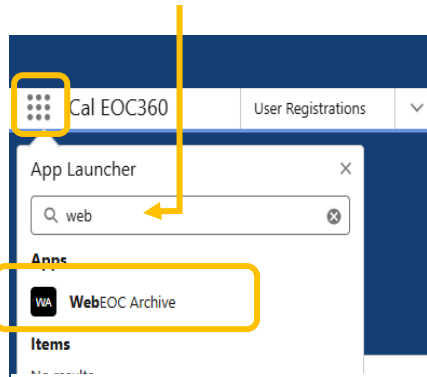


Figure 3 - Internal user app menu example

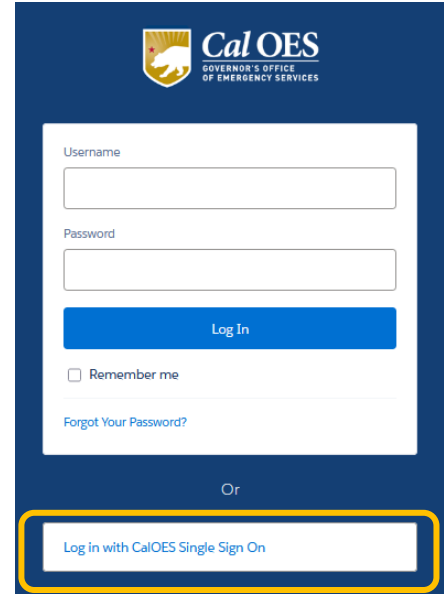


Figure 1 - Log in page for Cal OES staff users

Alternatively, you can use the App Launcher screen to go directly to the Archive you need.

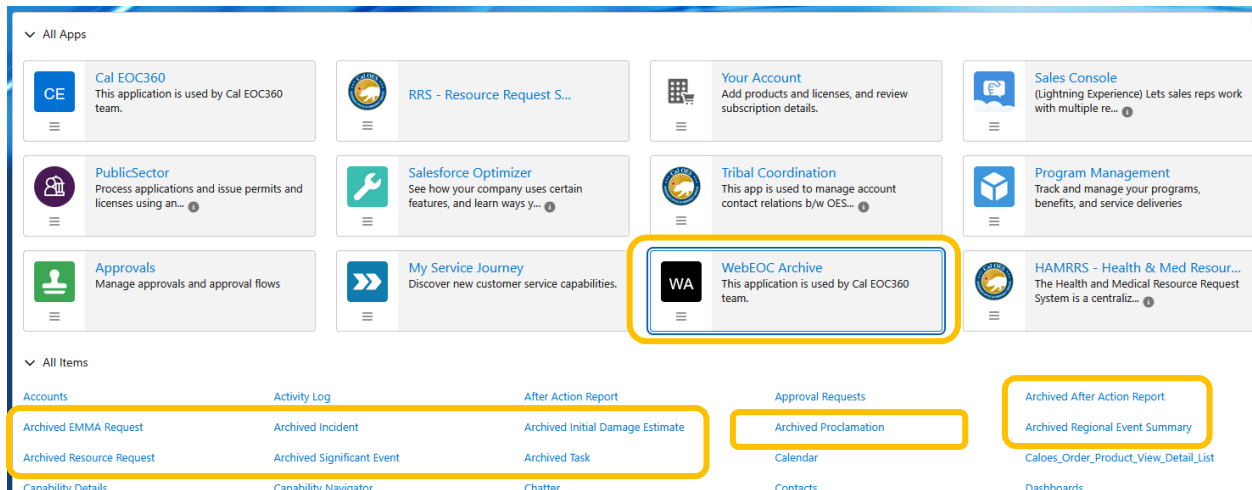


Figure 4 - Internal App Launcher screen

2.3 COMMUNITY PORTAL USERS

The procedures for accessing both the Live and Training environments are identical except for the URL.

- Community Live Environment: <https://engage.caloes.ca.gov>
- Community Training Environment: <https://caloes--training.sandbox.my.site.com>

Note: The Training environment is clearly identified to avoid confusion.

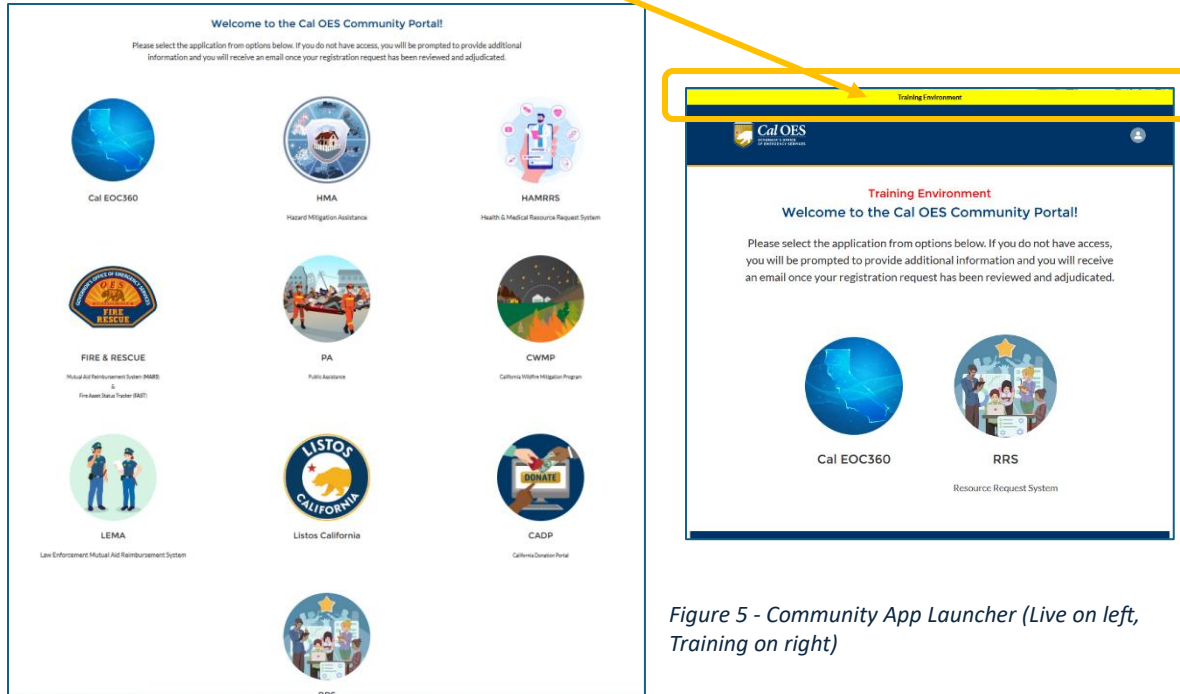


Figure 5 - Community App Launcher (Live on left, Training on right)

- Sign in to the Cal OES Community Portal, then select the Cal EOC360 application.
- Hover over the icon, then click the Go To App button.



Cal EOC360

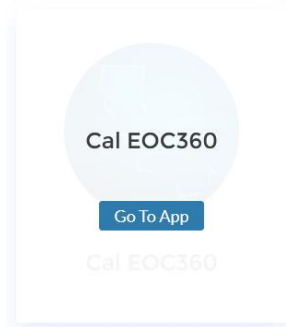


Figure 6 - Activating the Cal EOC360 Application

- Click on the WebEOC Archive icon.

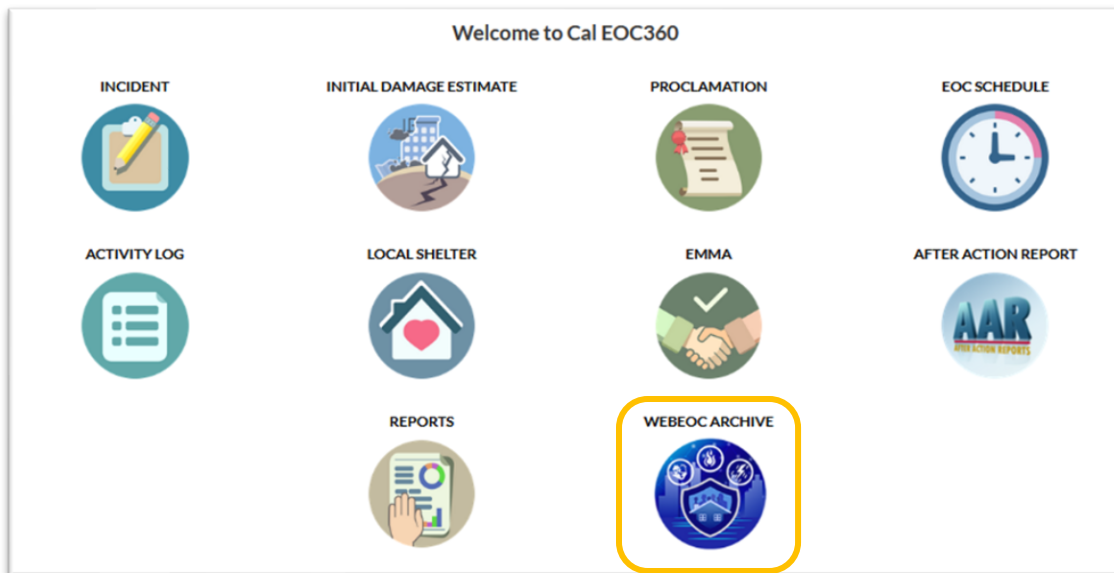


Figure 7 - Cal EOC360 Community Portal modules

This will take you to the available modules within WebEOC Archive.



Figure 8 - WebEOC Archive modules

Note that, as in the old CalEOC/WebEOC system, modules are not linked like they are in the new Cal EOC360 system. Incident names may vary across records for the same event.

3 SEARCH BARS IN THE WEBEOC ARCHIVE

The WebEOC Archive is a static set of records with many similarities to Cal EOC360, its parent application. The features described in this chapter work the same way across any application you have access to as a Cal EOC360 and WebEOC Archive user.

All applications in WebEOC Archive share a common header and set of action buttons. For more information about the navigation icons and action options, check out our Cal EOC360 User Guide.

There are several ways to find information, including a header search bar, a list view search bar, creating a reusable list view specific to your terms, and creating a report. Each method has its strengths.

3.1 HEADER SEARCH BAR

The search bar in the header will search across all records in the Salesforce Engage system to which a user has permissions to view.

Internal User:



Figure 9 - Internal user header

Community User:

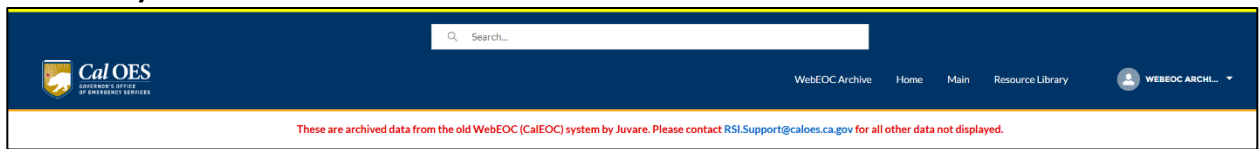


Figure 10 - Community user header

3.1.1 SEARCH EXAMPLES

Internal Users

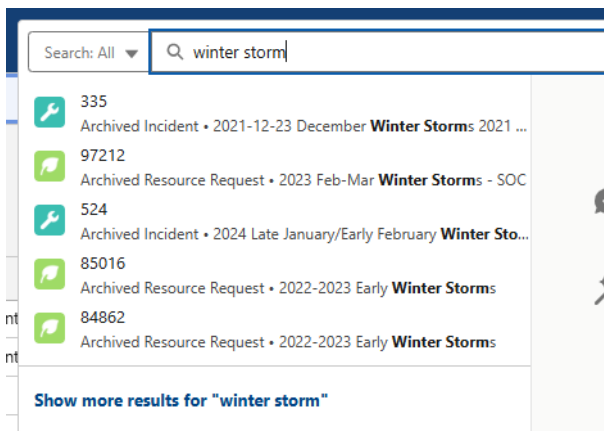


Figure 12 - Internal User Search Results

Community Users

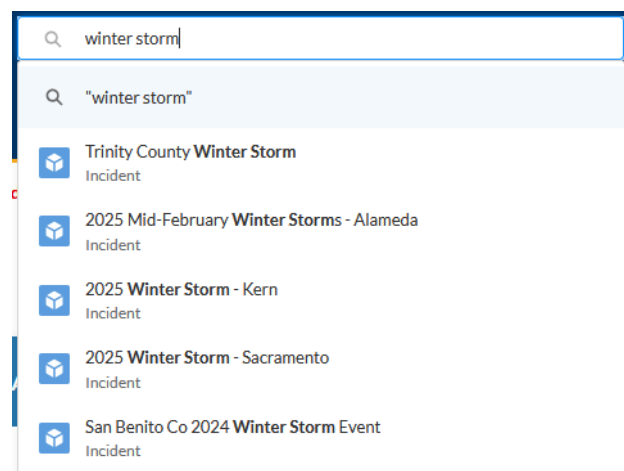


Figure 11 - Community User Search Results

3.2 LIST VIEW SEARCH BAR

When first visiting a board, you'll see the Recently Viewed list of records. Choose ALL from the List View menu. Using the search bar in the upper right area above the List View, you can find information that's specific to your needs.

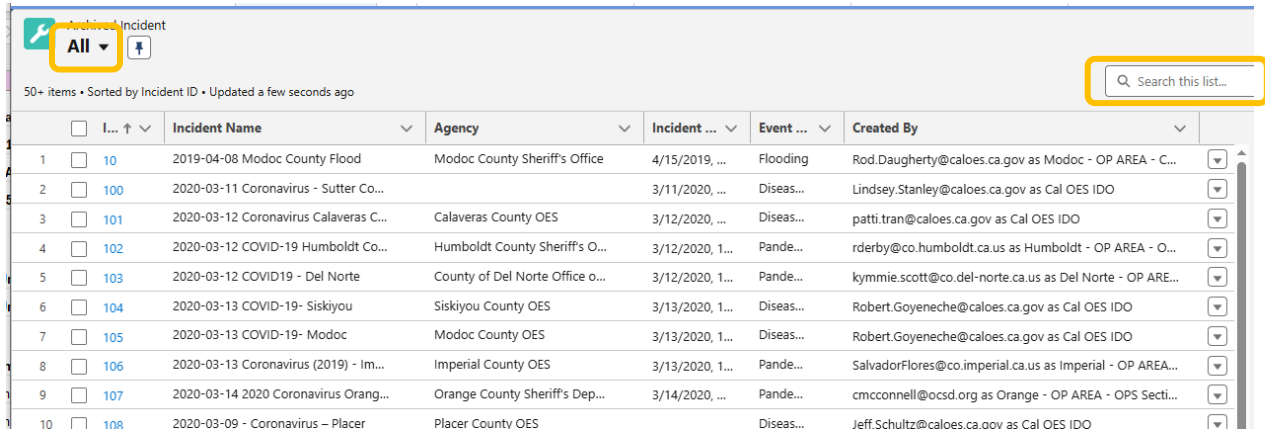


Figure 13 - Example List View, Archived Incident

4 LIST VIEWS: CREATING, EDITING AND SAVING

List views are great for a quick, configurable way to see, print and export list-oriented information in most modules.

There are two limitations to the List View search:

- Saved List views are personal and may not be shared with other users.
- List views in WebEOC Archive modules (Archived Resource Request and Archived Task) that have thousands of records may be incomplete. This search and list view option will only use the first 2,000 records. The list view may not show *all* relevant records.

Go to the module you wish to search (Archived Incident, Archived Resource Request, etc.). Use the gear and filter icons in the upper right corner of your screen to create and edit a List View.

4.1 INTERNAL VIEW

To create a new List View, use the gear icon to create a new or clone (a starter list view).

To edit a new or existing view, use the funnel icon to add new, edit existing or delete filters (conditions).



Figure 15 - Gear and Filter icons

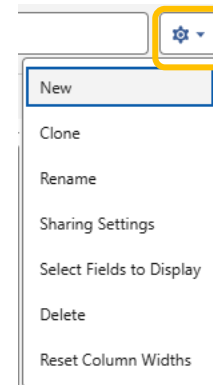


Figure 14 - Gear icon options

The filter fields may include more options than are visible on the main list view columns. These fields contain data from the archives and can be searched.

Click on Add Filter to add, or click on a filter to edit.

Once you have your list view configured, click the Save button to make this view an option in your List View menu.

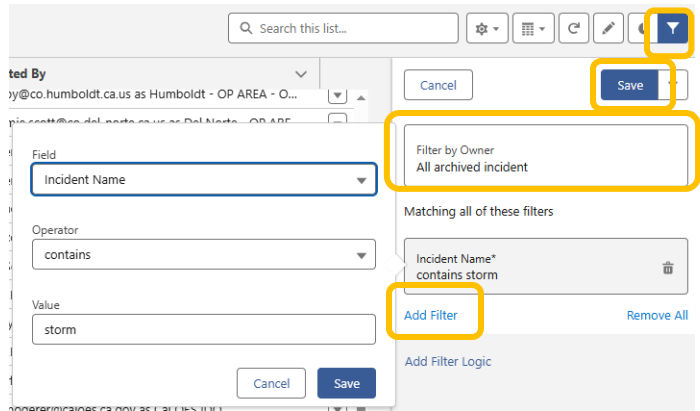


Figure 16 - Filter funnel, filter options, Save button

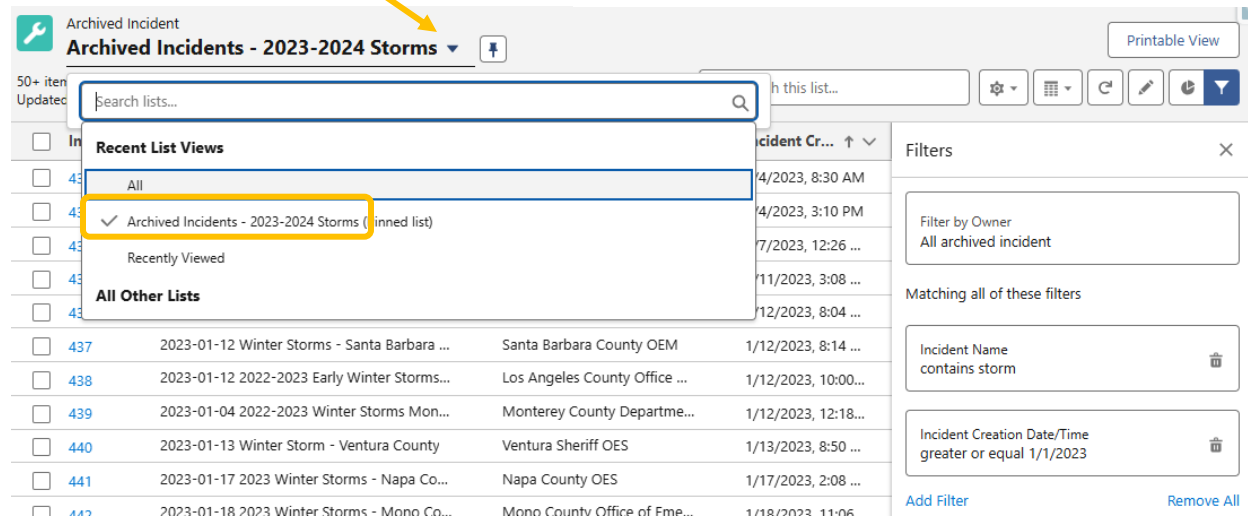


Figure 17 – Cloned and renamed list with filter shown on rights, saved to List View menu

4.1.1 PRINTING A LIST VIEW

Using the Printable View button in the upper right action area opens a new tab in your browser with a print-ready view of that list. Send to the printer using the Print This Page link (upper right corner), then save the page as a PDF or click to Close the Window.



Figure 18 - Printable Page options

4.1.2 EXPORTING A LIST VIEW

- To show different columns, use the gear icon to Select Fields to Display.
- Select the Printable View button for a new browser tab with your data.

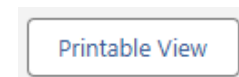


Figure 19 - Print button

- Check and adjust the Number of Records on the far right to make sure your list is complete.
- Adjust the Number of records displayed if needed.

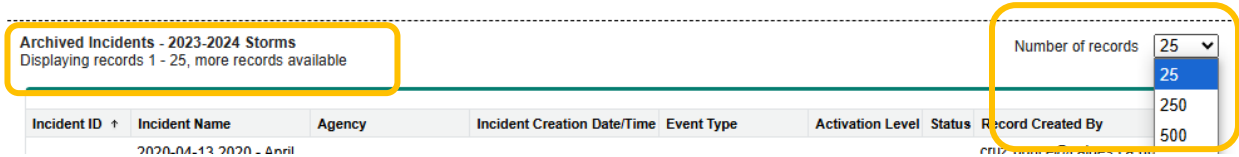


Figure 20 - Print view showing more records

- Once you have your display in order, select all data on that page using your mouse or keyboard.
- Copy, then paste it into a blank spreadsheet.

4.2 COMMUNITY VIEW

Community members can create a new List View using the gear icon and clone option. A new or cloned list view can be saved for your own use—the other options are disabled as indicated by the little information icons next to those choices.

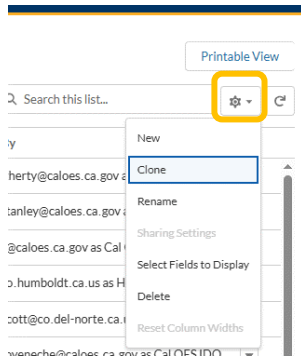


Figure 23 - Gear icon and clone list view option

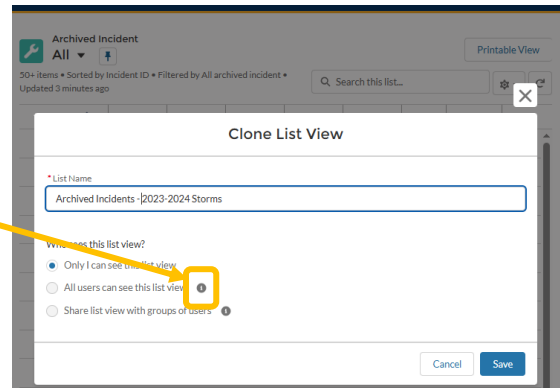


Figure 22 - Creating a new List View with information icons

NOTE: the filters will be available *only during creation of the list view*. Once the list view has been configured and saved, it can be used or deleted but filters can't be edited.

4.3 FILTER LOGIC

For conditional or combined requirements like a duration AND (either “atmospheric river” OR “storm”), use the Add Filter Logic option to configure your logic rules.

Colored boxes indicate changes that have not been saved.

Once saved, this List View is an option in your menu of List Views. Each new list view is specific to the module you're in.

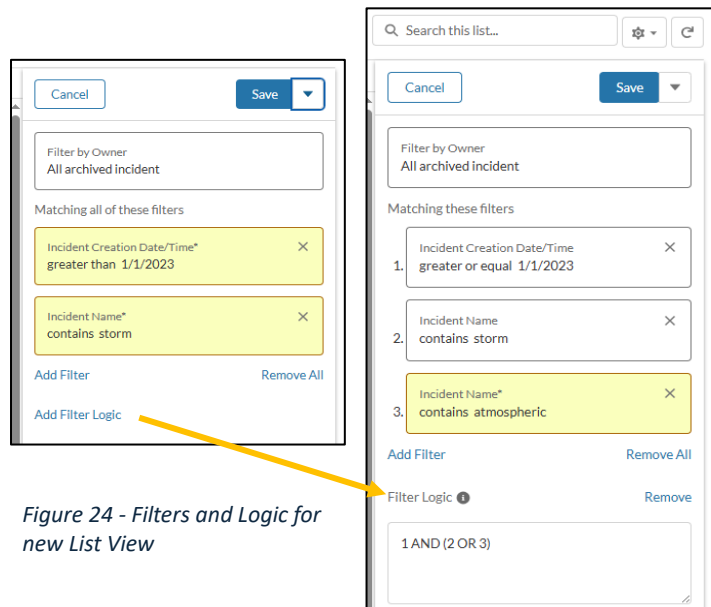


Figure 24 - Filters and Logic for new List View

5 REPORTS BOARD

You can also find records using the Reports module. For Archived Resource Requests and Archived Tasks (with thousands of records), Reports will be a more reliable way to find your records.

5.1 ACCESSING A REPORT

Recent Reports is the default view. Recently Viewed is the default for other modules in Cal EOC360 and WebEOC Archive as well.

If you are new to Reports, you may see a blank screen (nothing Recent).

- Select All Reports to get started.

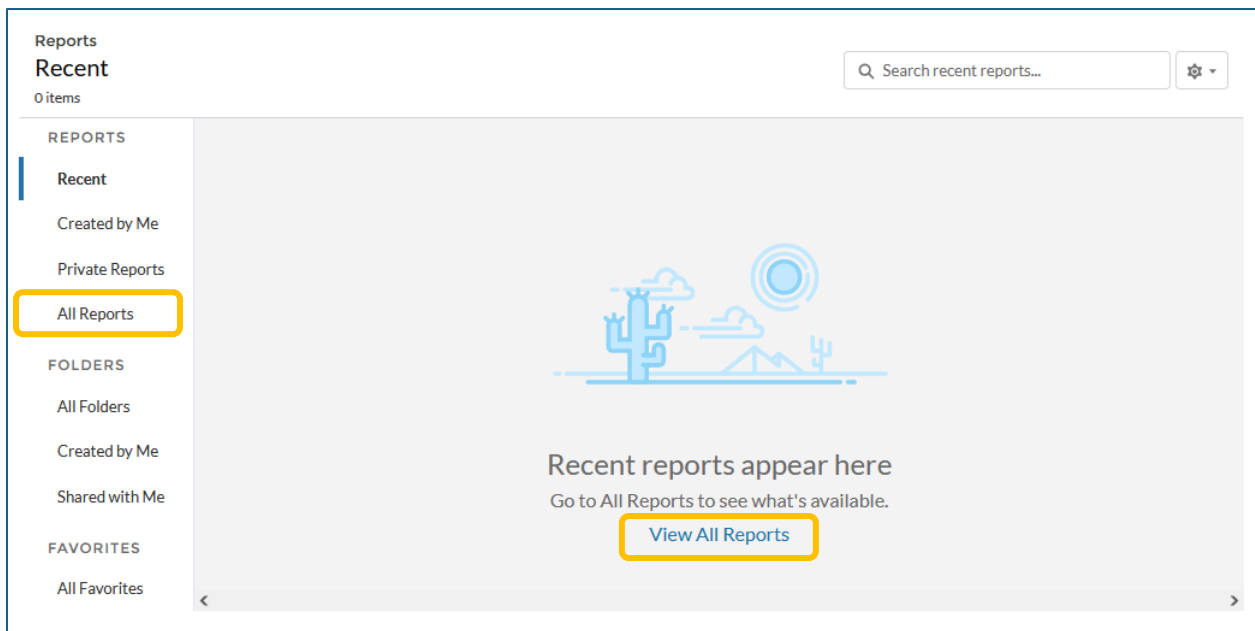


Figure 25 - Community Reports - No Recent Reports

- Select a view from the Reports column.

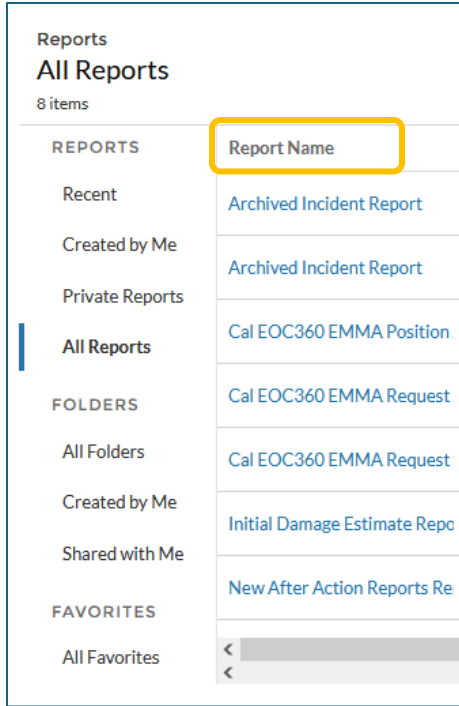


Figure 27 - Community Reports - All Reports

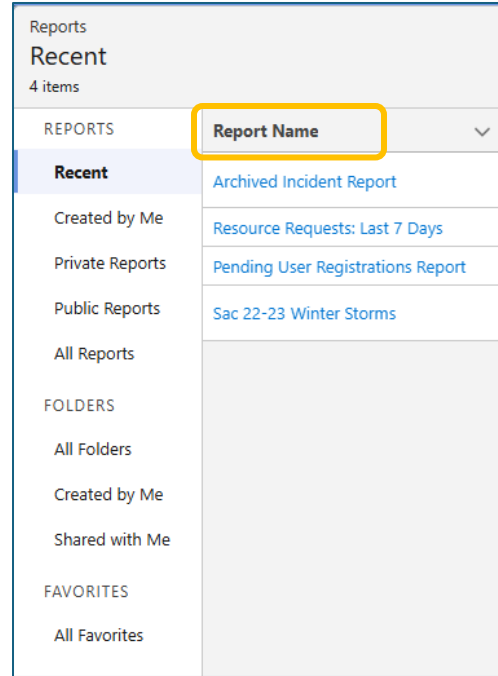


Figure 27 - Internal Reports - Recent Reports

- Click on a Report Name to open it.
 - Internal Users: The report will open in a new browser tab within WebEOC Archive.
 - Community Users: The report will open within the same browser window/tab.

5.1.1 Internal USERS

- Click the dropdown arrow to open the list of applications.
- Select Reports. This will display a Recent List View.
- Each report will open in a new browser tab.
- If you see the screen with No Results, click on the [Show All](#) link.

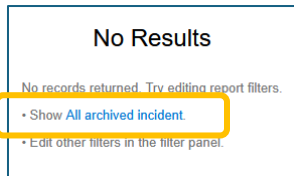


Figure 29 - No Results, Show All

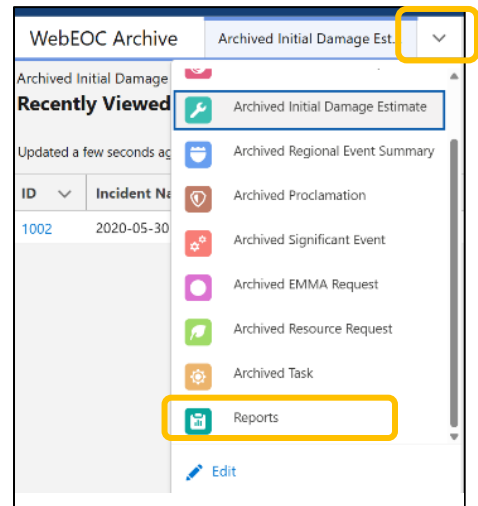


Figure 28 - Internal applications menu

5.1.2 COMMUNITY USERS

Click on the Reports icon to access available reports. The list will default to Recent reports.

Community Users can access reports listed in All Reports. If specific reports are needed, please send a request to RSI.support@caloes.ca.gov describing the information you need.



Figure 30 - Community portal archive applications

5.2 CREATING A NEW REPORT

The ability to create a new report is dependent on the user's permissions.

5.2.1 INTERNAL USERS

- Click New Report in the upper right area of the screen. This will open a Create a Report page.
- Select All to see Archived and other report templates.
- In the Search Report Types box, type Archive to see templates for the archive modules.

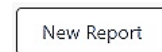


Figure 31 - New Report button

Create Report

Category	Select a Report Type																												
Recently Used	<input type="text" value="archive"/>																												
All	<input type="button" value="Filter report types (0)"/>																												
Accounts & Contacts	Showing results for archive																												
Activities	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 70%;">Report Type Name</th> <th style="width: 30%;">Category</th> </tr> </thead> <tbody> <tr><td>Activities with Archived Resource Request</td><td>Standard</td></tr> <tr><td>Archived After Action Report</td><td>Standard</td></tr> <tr><td>Archived EMMA Response</td><td>Standard</td></tr> <tr><td>Archived EMMA Response History</td><td>Standard</td></tr> <tr><td>Archived Incident</td><td>Standard</td></tr> <tr><td>Archived Initial Damage Estimate</td><td>Standard</td></tr> <tr><td>Archived Proclamation</td><td>Standard</td></tr> <tr><td>Archived Proclamation History</td><td>Standard</td></tr> <tr><td>Archived Regional Event Summary</td><td>Standard</td></tr> <tr><td>Archived Resource Request</td><td>Standard</td></tr> <tr><td>Archived Resource Request with Archived Task</td><td>Standard</td></tr> <tr><td>Archived Significant Event</td><td>Standard</td></tr> <tr><td>Archived Significant Event History</td><td>Standard</td></tr> </tbody> </table>	Report Type Name	Category	Activities with Archived Resource Request	Standard	Archived After Action Report	Standard	Archived EMMA Response	Standard	Archived EMMA Response History	Standard	Archived Incident	Standard	Archived Initial Damage Estimate	Standard	Archived Proclamation	Standard	Archived Proclamation History	Standard	Archived Regional Event Summary	Standard	Archived Resource Request	Standard	Archived Resource Request with Archived Task	Standard	Archived Significant Event	Standard	Archived Significant Event History	Standard
Report Type Name	Category																												
Activities with Archived Resource Request	Standard																												
Archived After Action Report	Standard																												
Archived EMMA Response	Standard																												
Archived EMMA Response History	Standard																												
Archived Incident	Standard																												
Archived Initial Damage Estimate	Standard																												
Archived Proclamation	Standard																												
Archived Proclamation History	Standard																												
Archived Regional Event Summary	Standard																												
Archived Resource Request	Standard																												
Archived Resource Request with Archived Task	Standard																												
Archived Significant Event	Standard																												
Archived Significant Event History	Standard																												
Contracts and Standard Orders																													
Price Books, Resources and Assets																													
Administrative Reports																													
File and Content Reports																													
Other Reports																													

Figure 32 - Archived report templates

Note: If the report name does not start with “Archived” the information will not be in WebEOC Archive. It may be from Cal EOC360 (the parent app) where more recent information is stored.

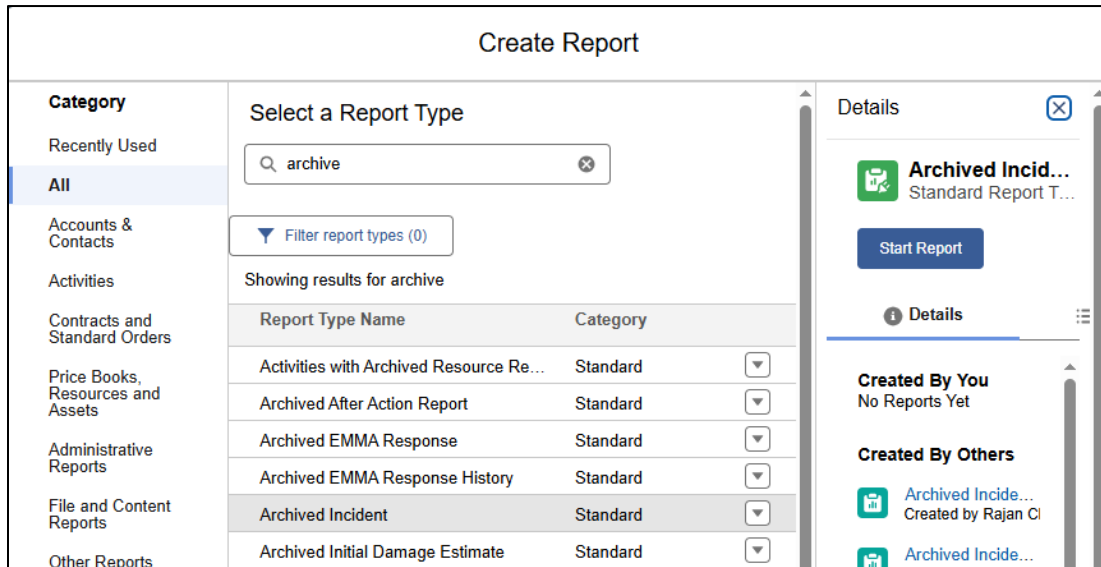


Figure 33 - Start a Report screen

- Select the type of report you wish to create.
- Click the Start Report button on the right side.

This will bring up a report list with pre-selected columns already in place.

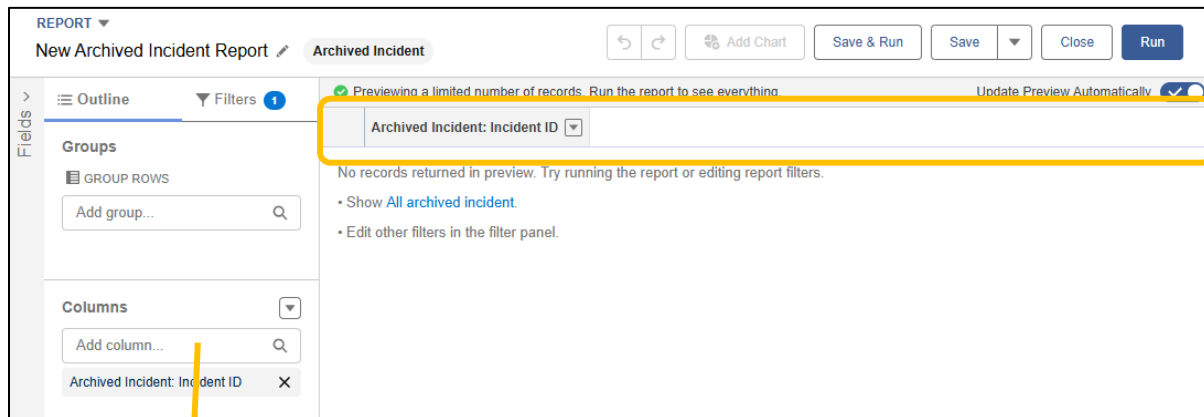


Figure 34 - New Report template

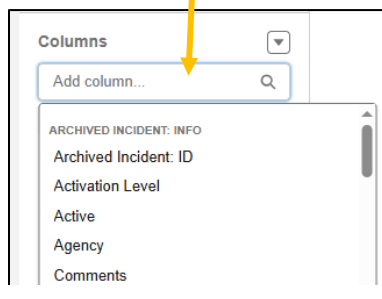


Figure 35 - Add Column selector

Add new columns with the Add Column field. The lists can be searched by typing. Available fields differ from module to module.

Columns may be dragged within the column list on the left side of the report, or in the headers, to change the order on the display.

Columns and groups can be removed by clicking the X on the right side of the column/group name.

Adding a group will sort the records by the group's field(s). In this case, we're grouping by the Event Type (in the first column).

<input type="checkbox"/> Active Shooter (1)	36	2019-08-19 Gilroy Festival Incident	2019-08-19 Gilroy Festival Incident
Subtotal			
<input type="checkbox"/> Agency Assist (1)	237	2021-02-25 CA MPP State Support	2021-02-25 Ca MPP state support
Subtotal			
<input type="checkbox"/> Agriculture and Natural	512	2023-12-05 Avian Flu Event	2023-12-05 Avian Flu Event
Subtotal			

Figure 36 - Incident list grouped by Event Type

Note: Available columns and groups are limited to fields available in the type of report being created.

Helpful tools and buttons:

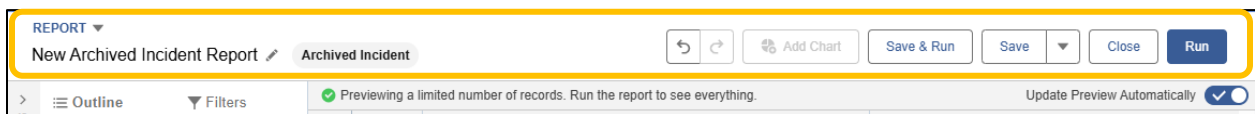


Figure 37 - Working Report Header options

Top row (highlighted):

- Report Name (editable by clicking on pencil)
- Active/working module name
- Undo button
- Save and Run Report button
- Save (and Properties) buttons
- Close (to close Report without saving when done)
- Run the report button

Selectors Row:

- Outline: determine which groups, fields and order your report will display
- Filters: allows display of records with certain characteristics
- Update Preview Automatically: displays a partial report with set fields, groups, and filters

5.2.1.1 SAVING A REPORT

- Click the Save or Save & Run button.
- Name the report.
- Add a description if desired—it will be helpful later on.
- Select the folder to save it to.
- Click [Save](#).

The *new* report will now appear in the Reports list under the folder selected.

5.2.2 COMMUNITY USERS

Community Users are limited to using existing reports. The gear icon in the Reports list view has two options to configure an existing report. If a new report is needed, send an email to RSI.Support@caloes.ca.gov with required dates and information being requested.

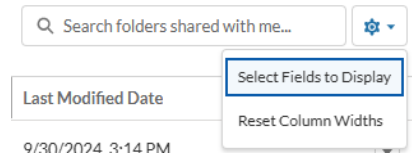


Figure 38 - Community User Report options

5.3 REPORT ACCESS AND PERMISSIONS

5.3.1 INTERNAL USERS

- Internal users have access to create and manage reports.
- Internal users have access to all report folders.

5.3.2 COMMUNITY USERS

- Community users have access to view the reports created by ADMINS
- If the community user needs a specific report or reports for records between 2014 - 2018, please contact RSI Support at RSI.Support@caloes.ca.gov

6 APPLICATION SUPPORT

6.1 RESOURCE LIBRARY

A resource library is available in the WebEOC Archive. This User Guide can be found there.

6.1.1 INTERNAL USER RESOURCE LIBRARY

- Select Files from the main tab dropdown menu (application modules)
- Select Libraries from the list on the left

Note: documents may be in any of the folders.

6.1.2 COMMUNITY USER RESOURCE LIBRARY

- Click the Resource Library link from the upper right corner of your browser window.

6.2 SUPPORT INFORMATION

If you run into system errors, please take a screenshot and email as much information as you can. We'll try to reproduce your error and resolve it.

To contact the WebEOC Archive support team, email RSI.support@caloes.ca.gov.