Welcome to NC4 Training

Module: Configuration

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1 Module: Configuration

The NC4 application is deployed with a central database called the **Data Dictionary** and an online library named **References**. Within the Data Dictionary and References are configurable keywords, user definable values, default menus and color codes that are used to generate and display reports and content for drop-down menus.

The configuration process is critical to tailoring the application to the operational needs of the organization; and in this module is composed of the following:

> **References > Organization Charts** provide the method to identify the various organizations and the positions within the entity. You can build and display your organizational structure online, based on the structure of your organization and skill sets of your personnel. Within this **Organization,** you can create hierarchical levels, define the individual positions within each level, and include contact information and department or position duties (checklists) for each level or position.
> **Data Dictionary > Position Template** has the ability to create any number of customized menus that can be assigned to any position/user within any organization created within your system. This feature enables the user/system administrator/jurisdiction to define, modify and control which forms/reports are assigned to or displayed for which position(s).
> **References > Sites** allows the user to load critical sites into the system or you can create a list of fixed sites and their locations to reference. Sites from this list can then be accessed in the geo location section of any report. These sites include critical infrastructures such as airports and schools.
> **References > Reference Documents** can act as a library for all personnel utilizing the system enabling you to store and retrieve documents. All plans, checklists, SOPs, and other reference material including the application courseware can be electronically stored within the system.
> **References > Task Template** provide a template to create tasks that can be reused and repeatedly assigned without entering a completely new task each time.

Note: All person names and corresponding titles used in this document are fictitious. The names and titles are being used for the sole purpose of illustrating the systems' features and functionalities in an instructional environment.

Learning Objectives

After completing this module, you will be able to:

- Create, view and update Organization Charts and Positions.
- Create, view update and assign Position Templates.
- Create, view and update Sites.
- Create, view and update Reference Documents.
- Create view and update Task Templates.

I C O N   K E Y

📂 Valuable information
✎ Test your knowledge
🖥 Keyboard exercise
📖 Review

2 References-Organization Charts

Organization Charts provide a method to create and maintain an organizational structure within a jurisdiction or Incident/Event/Activity. **Organizations** and **Positions** added in the **Organization Chart** section become available for use in your Personal Profile. In addition, the Organizations and Positions assist in structuring and defining the reports views that are displayed for each position.

2.1 Locating Organization Charts

Existing **Organization Charts** are presented to you alphabetically when you select **Organization Chart** under **References** in the **Report** navigation drop down menu, as shown in Figure 1.
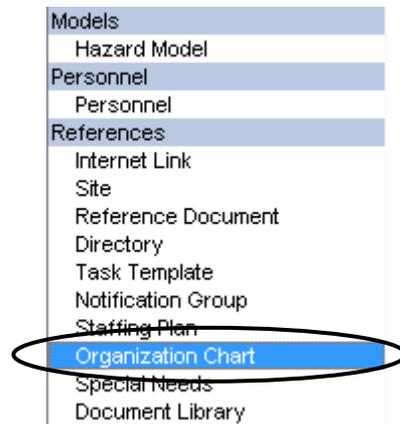
Figure 1 Locating Organization Chart

2.2 Viewing Existing Organization Charts

To *view* an existing **Organization Chart**, click the **Organization's Name** link as shown in Figure 2 to open the **Organization Chart** displayed in Figure 3.

Figure 2 Organization Chart Summary Screen
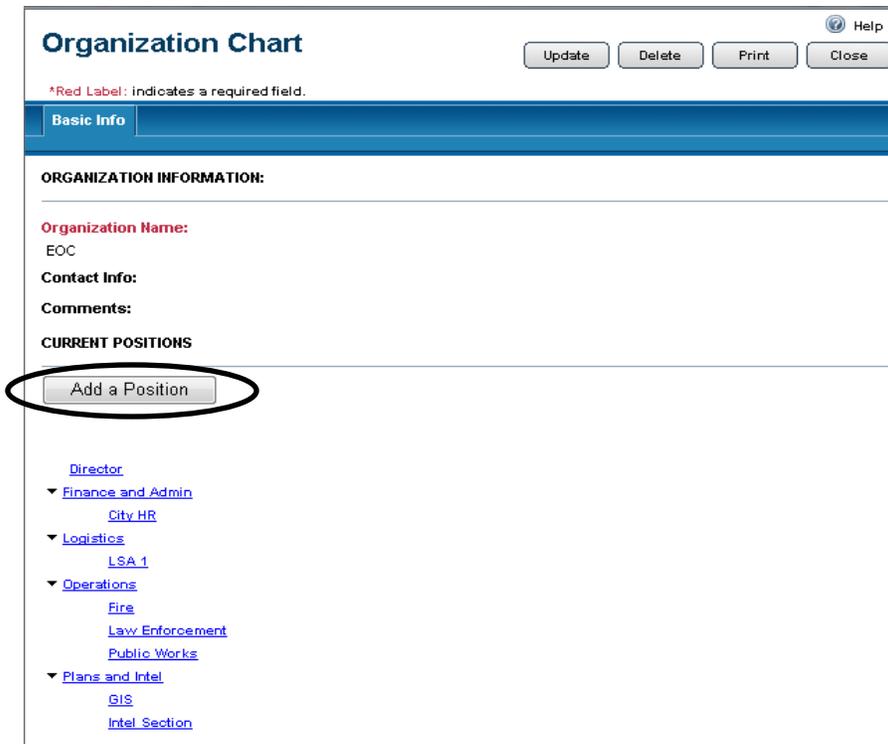
Figure 3 Org Chart in *View* Mode

In Figure 3, the **Org Chart** is opened in *View* mode and contains the **Add a Position** button.

You will see the [Update] [Delete] [Print] [Close] buttons in the upper right of the Organization Chart form depending on your access level and discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy, and the **Close** button to close the report window and return to the summary screen.
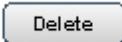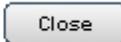
📂 Deleted reports are removed from active lists but are maintained in history.

2.3   Creating an Organization Chart

To create a new Organization Chart, perform the following steps:

1   Select **Organization Chart** from the **Report** navigation drop down menu as shown in Figure 4.
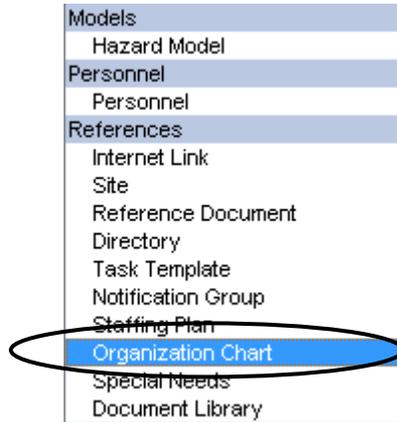
Figure 4 Organization Chart in Report Navigation Menu

2   Click the [Create] button as shown in Figure 5, to open a new Organization Chart .
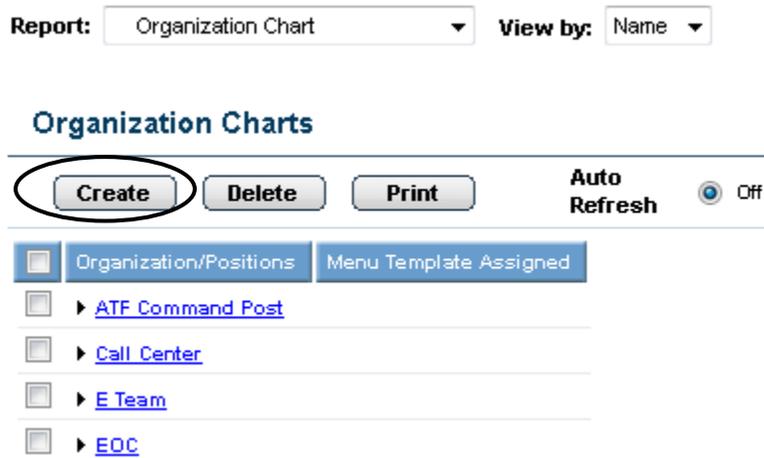
Figure 5 Opening a new Organization Chart

3   In the **Organization Information** section of the new **Organization Chart** form, key in an Organization Name and any appropriate **Contact Info** or **Comments** in the fields provided, as shown in Figure 6.

Figure 6 New Organization Chart
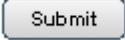
4   Click the [Submit] button in the upper right of the form to save the organization information.

The Organization Chart screen now opens in *View* mode with the **Add a Position** button, as shown in Figure 7.
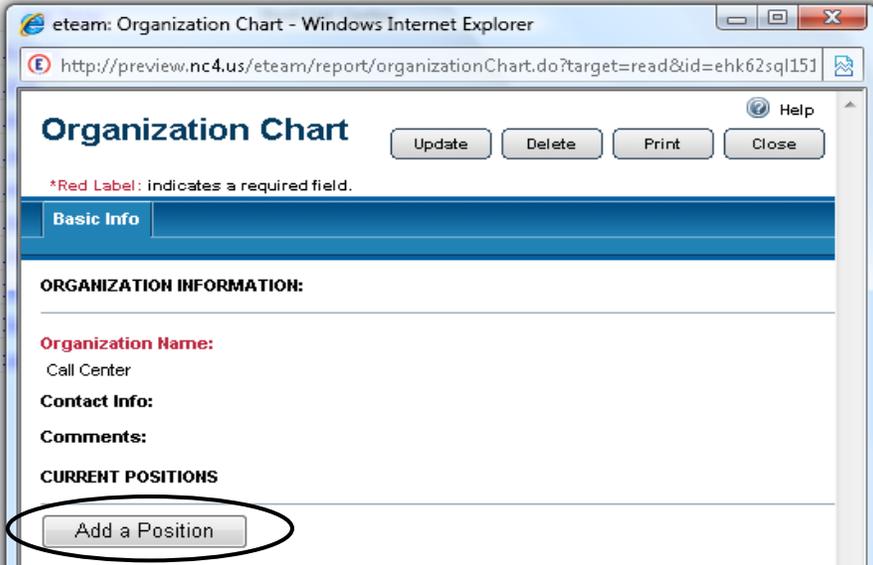
Figure 7 Organization Chart in View mode

You will see the [Update] [Delete] [Print] [Close] buttons in the upper right of the **Organization Chart** form depending on your access level and discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy, and the **Close** button to close the report window and return to the summary screen.
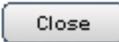
📂 Deleted reports are removed from active lists but are maintained in history.

2.3.1   Adding a Position to an Organization

A **position** is governed by the **organization** in which it was created. When an **Organization** is selected, the user will be able to *view* or select the positions that are assigned to that organization.

To open an existing Organization Chart, perform the following:

1   Click on or expand an existing **Organization** Name link as shown in Figure 8.

Figure 8 Open an Existing Organization

2   Click the [Add a Position] button which will open to the **Organizational Element** window, as shown in Figure 9.
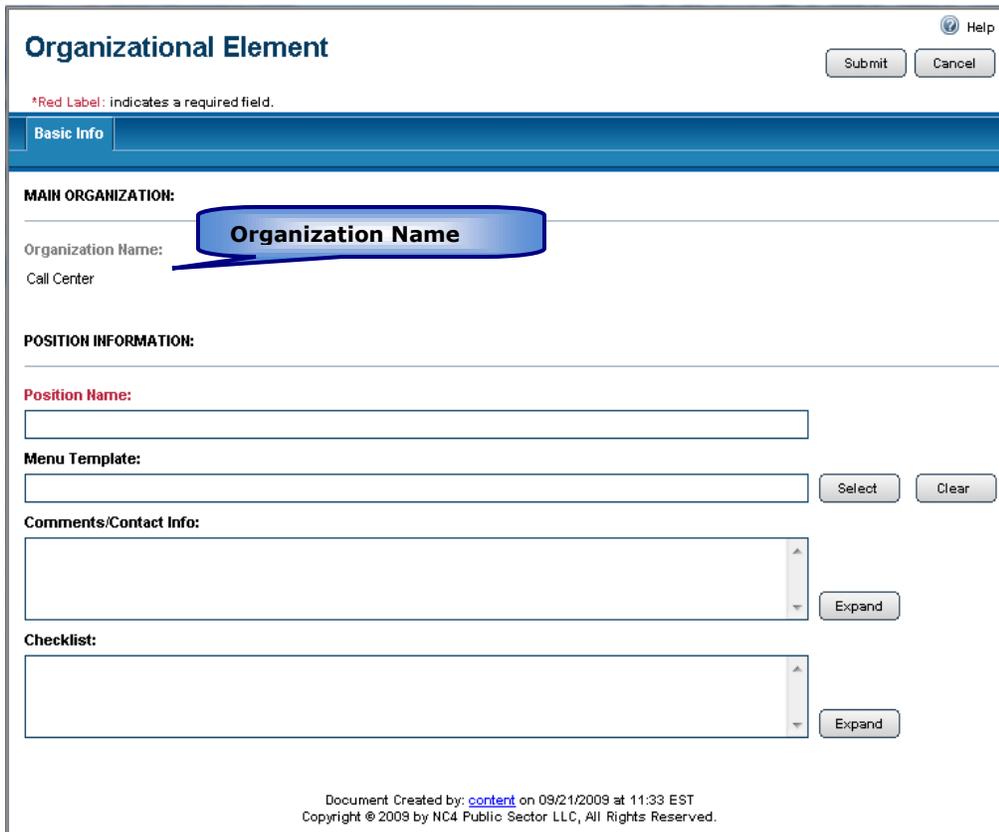
Figure 9 Organizational Element Window

You will observe that the Organization Name is grayed in on the **Organization Element** form.

3   Key in a **Position Name** in the Red Labeled field.

4   Select a **Position Menu Template** by clicking the [Select] button as shown in Figure 10.
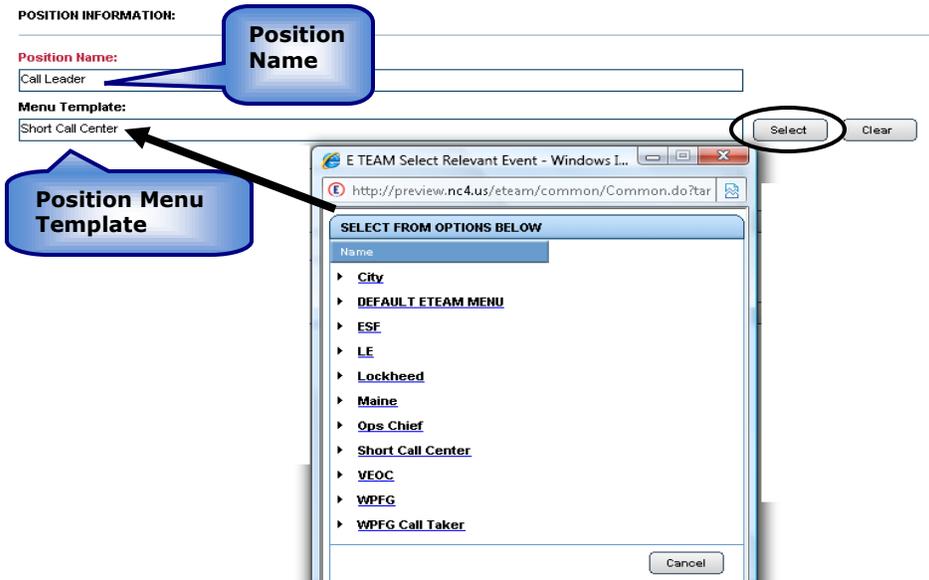
Figure 10 Position Name and Menu Template

The **Position Menu Template** determines the default **Report** navigation drop down menu for individuals with this position selected in their **Personal Profile**. More information about creating and assigning a **Position Menu Template** can be found in Section 3.0.

5   Key in any appropriate **Comments/Contact Info** and **Checklist** duties for the position as shown in Figure 11.

Figure 11 Contact Info and Checklist Fields

The information entered in the Checklist field will populate the **Duties Checklist** dialog box that users may see when they submit their **Personal Profile** in the NC4 application or click the **Checklist** button in the **Top Tools** frame.

6   Click the [Submit] button to save the information for this position.

The **Position** has been added to the **Organization** and the information is displayed in the **Organizational Element** form in *View* mode as shown in Figure 12.
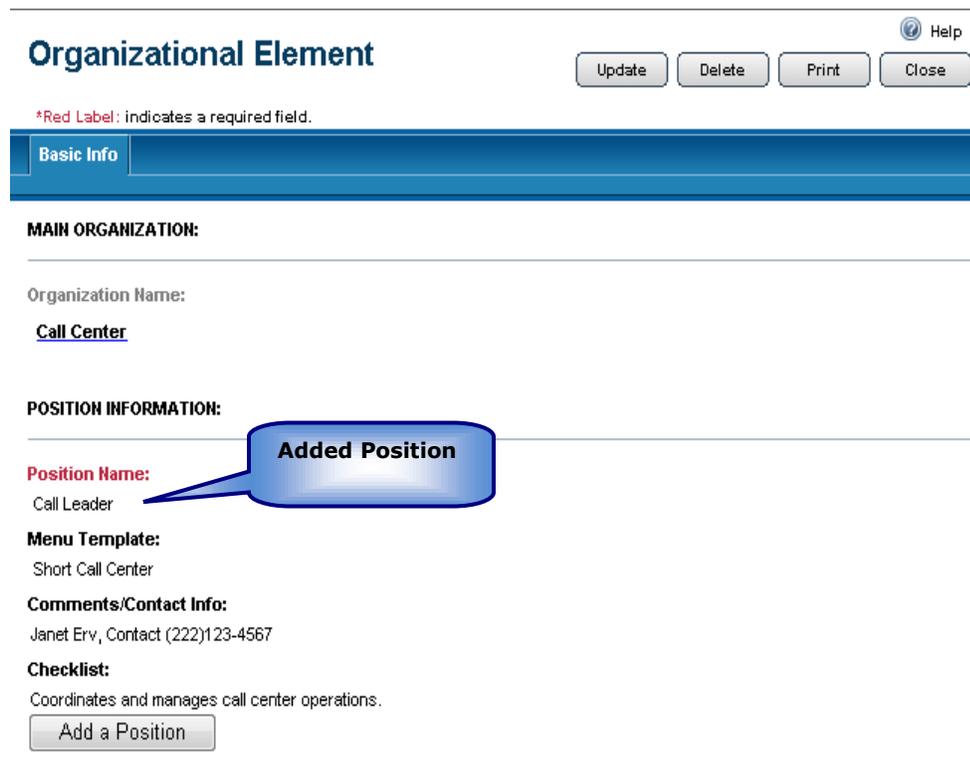
Figure 12 Completed Position form

7   To add a subordinate position to the position that has been created in the **Position Name** field, click the [Add a Position] button on the completed **Organizational Element** form and repeat the same process. Click the **Submit** button to save the new position to the system.
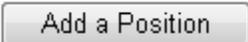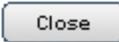
You will see the [Update] [Delete] [Print] [Close] buttons in the upper right of the **Organizational Element** form depending on your access level and discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy, and the **Close** button to close the report window and return to the summary screen.

<blockquote>📁 Deleted reports are removed from active lists but are maintained in history.</blockquote>

2.3.2 Completed Organization Chart with Positions

A complete **Organization Chart** with a **Menu Template Assigned** may resemble the examples shown in Figure 13.

Figure 13 Completed Organization Chart with Positions

Organization Charts can be created and updated at any time.

3 Data Dictionary-Position Template

The NC4 application has the ability to create any number of customized menus that can be assigned to any position/user within any organization created within your system. This feature enables the user/system administrator/jurisdiction to define, modify and control which forms/reports are assigned to or displayed for which position(s).

It is a valuable tool because it enables a menu list to be tailored specifically to a user/position; it enables the system to display the menu that contains only those forms/reports in the **Navigation** frame that the user will access. The users do not have any extraneous options around which to navigate.

3.1 What is a Position Template?

The Position-Based Menus are lists of the forms/reports associated with a given position/user. They are created using the **Position Template** in Data Dictionary. With the **Position Template**, you determine the content of the menu list to be provided in the report navigation frame based on the position of the user.

The system administrator has the ability to customize both the **Full Menu** and the **Position Menu** to best meet the needs of the organization, position, and situation. The menus only display those reports and views available based on that position's level of access. At login, the system displays the position menu assigned to the user or, if no menu assignment has been made, the default menu and view as defined by your system administrator displays.

A **Position Menu** is a way of ensuring that precious processing time is not wasted accommodating menu choices that will not be used by the particular individual/office/agency/jurisdiction.

Position Menus consist of two steps. The first step is **"creating"** the menu template, the second is **"assigning or associating"** the menu template to a position within an organization. The **Position Template** can be assigned to more than one organization or position.

3.2 Viewing & Updating Position Based Menus

This section of the module provides an overview of **Position Based Menus** and the **Position Template** used to create the **Position Based Menus**. You will become familiar with the layout of the **Position Template** and understand the type of information that it can contain.

To *View* existing **Position Based Menus** select **Position Template** from the **Report** navigation drop down menu, as shown in Figure 14.
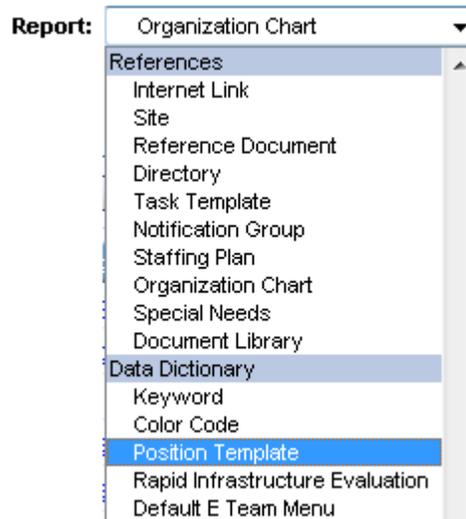
> 🖿 Data Dictionary is the top-level report type for Position Template.

Figure 14 Selecting Position Template

Position Templates can be viewed by **Name, Assignments**, or **History**, as shown in Figure 15.

Figure 15 Position Template Viewed by Name

Remember, when you are assigned a **Position Template**, your **Report** navigation drop down menu is based on your position. Once you log in and submit your Personal Profile your position is included (established) in your **Personal Profile**. The position indicated in your **Personal Profile** is established in the **Organization Chart** and accesses the associated **Position Based Menu** that was created by using the **Position Template**. What is included in the **Position Template** determines what appears in the **Report** navigation drop down menu when a user submits his or her profile.

Figure 16 shows two different **Position Based Menus**. Note the differences between the available **Report** navigation drop down menu items.
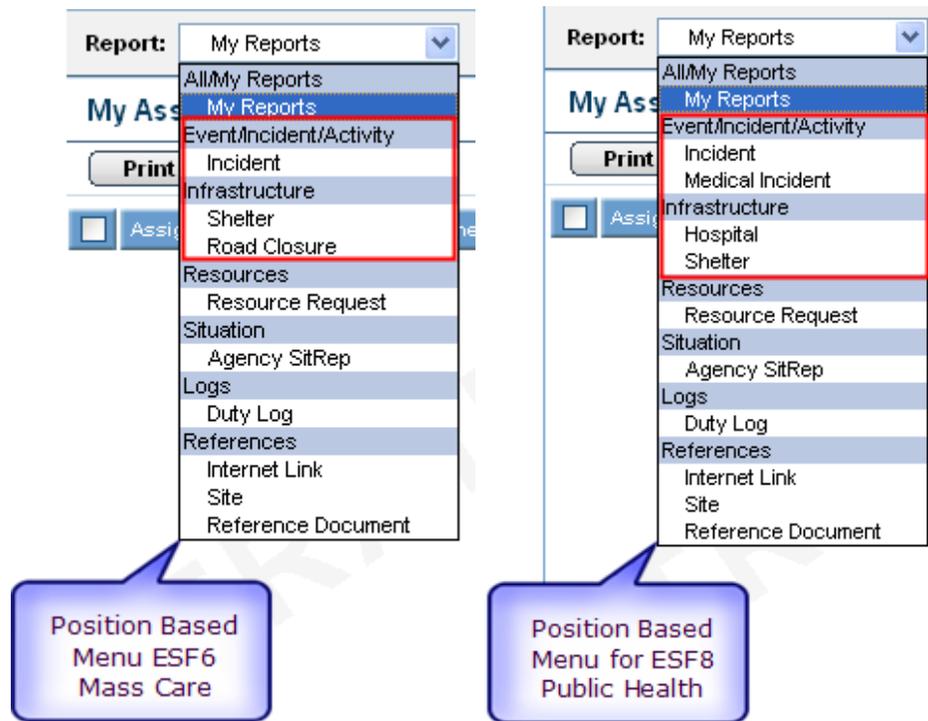
Figure 16 Two Different Position Based Menus

This view gives you a snapshot of the **Report** navigation drop down menu differences between positions within a jurisdiction.

To change which **Position Based Menu** is displayed in your **Report** navigation drop down menu, the position indicated in your **Personal Profile** needs to be changed.

Changing the content of an existing **Position Based Menu** is similar to creating a new **Position Based Menu**, which is described later in this module. First access the associated **Position Template** from the **Report** summary screen, click the **Update** button and update it to make the changes required, and click the **Submit** button to complete the update.

Updates made to a **Position Template** take effect immediately. However, a logged on user will not see the changes until they:

• Refresh the browser window, or

• Login to the system again.

Users who change his or her position on the **Personal Profile** form during a session will see the **Report** navigation drop down menu associated with the new position after submitting his or her updated Personal Profile.

Users may also have the ability to toggle between his or her **Position Menu** and the **Full Menu** by clicking on the radio button in the **top navigation frame** as shown in Figure 17. This option must be enabled within Position Menu, View Options tab. Also it is covered in section 3.3.2.1 of this module.

> 📂 The Full Menu contains all forms and reports available for the user's access level.

Figure 17 Position and Full Menu Buttons

3.3   Creating a Position Template

This section of the module will assist you in creating a Position Menu Template. You will become familiar with the layout of the template and understand the type of information that it can contain.

To create a new Position Template, perform the following steps:

1   Select **Position Template** from the **Report** navigation drop down menu.

2   Click the **Create** button on the Position Template summary screen as shown in Figure 18.

Figure 18 Creating a Position Template

📂 Data Dictionary is the top-level report structure for Position Template.

This will open a new Position Template as shown in Figure 19.

Figure 19 New Position Template form

Note that when the **Position Template** form opens, there are two tabs, the **Basic Info** tab displays as the default and the **View Options** is the second tab. We will summarize the tabs used in this form.

3.3.1   Basic Info

As shown in Figure 19, the **Position Template** form contains the following **Basic Info** section fields that identify the template:

- Template Name

- Description

3.3.1.1 TEMPLATE NAME

Key the name of the template into the **Template Name** field as shown in Figure 20. It is suggested that the name be analogous to the position which the template applies. This is a required field.

*Template Name:

Figure 20 Template Name Field

📂 *Red Label indicates a required field.
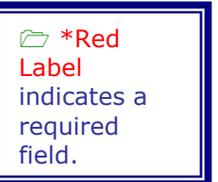
3.3.1.2 DESCRIPTION

Key a description of the template into the **Description** field as shown in Figure 21.

Description:

Figure 21 Description Field

Proceed to the **View Options** tab.

3.3.2   View Options

The **View Options** tab shown in Figure 22 contains two options with distinct functionality.
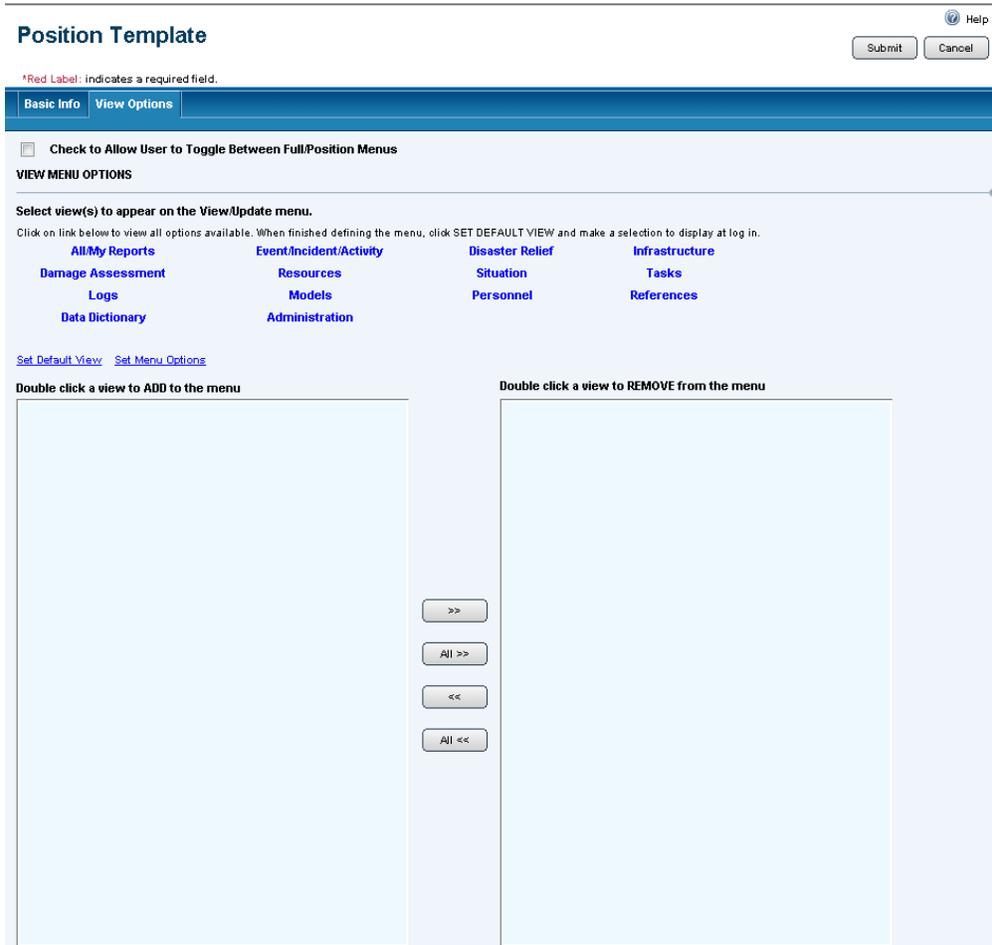
Figure 22 View Options Tab

3.3.2.1   MENU TOGGLE

The top of the screen provides the option for the user(s) assigned to this Position Template to be able to **toggle** between his or her **Position Menu** and the **Full Menu**, which contains all forms and reports available for the user's access level. To enable this functionality click in the checkbox indicated for **Check to Allow User to Toggle Between Full/Position Menus**, as shown in Figure 23. If you do not want to provide this access, leave the box blank.
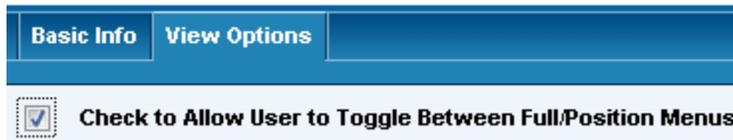
Figure 23 Enable Menu Access

When this option is enabled, the user will have the ability to toggle between his or her assigned **Position Menu** and the **Full Menu** by the click of a radio button on the **top navigation frame**, as shown in Figure 24. The radio buttons used to toggle between menus will only be visible in the **top navigation frame** to those users who have selected a position with a **Position Menu** having this option checked.

Figure 24 Top Navigation Frame

If this position is not granted the option to toggle between menus, the **Report** navigation drop down menu will only display those forms and reports specifically granted to this position. **The Position Menu** and **Full Menu** options will not appear in the top navigation frame.

3.3.2.2   VIEW MENU AND REPORT ACCESS OPTIONS

To associate the reports with a Position Template:

1   Click one of the top-level report structures, such as **"Infrastructure".**

All available reports within that report structure will appear in the menu on the left.

2   Select the reports from the menu on the left that are to appear in the **Report** navigation and **View by** drop down menus for this position.

Each report <u>Name</u> link you click moves to the box on the right, as shown in Figure 25.
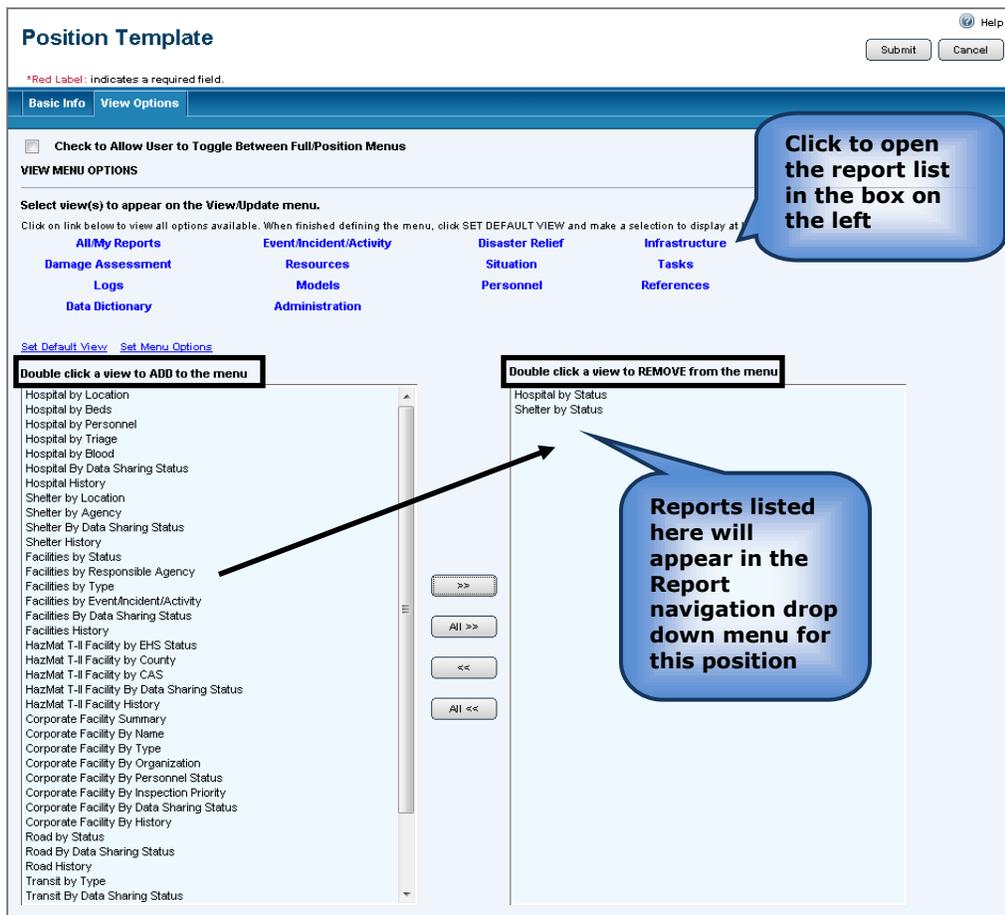
Figure 25 Selecting Report Options

There are multiple ways to move the reports from right to left and left to right, enabling or disabling access.

To move an individual report:

- Double click the report <u>Name</u> link. Double clicking the report <u>Name</u> link of an individual report will move it in both directions. If clicked on the left it will move to the right; if clicked on the right it will move to the left.

- Single click the requested report to highlight it and then click the [>>] button. This will move the report from the left to the right, which will add the report to this position's Report navigation drop down menu.
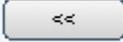
- Single click the requested report to highlight it and then click the [<<] button. This will move the report from the right to the left, which will remove the report from this position's Report navigation drop down menu.

To move All reports
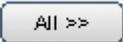
- Click the [All >>] button to move the entire report list from the left to the right, which will add all the reports to this position's Report navigation drop down menu.

- Click the [All <<] button to move the entire report list from the right to the left, which will remove all the reports from this position's Report navigation drop down menu.

The **Set Default View** and **Set Menu Options** are covered in the Module: Menu Views.

3.4 Completing Position Template

When you have completed the **View Options** tab, click the [Submit] button in the upper right to save the report. The **Position Template** will now be available in *View*/Update mode, as shown in Figure 26.
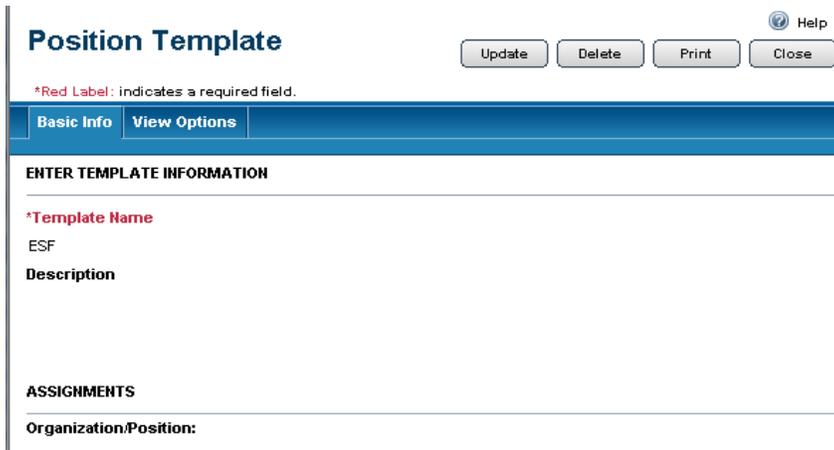
Figure 26 Completed Position Template in *View* Mode

To view the list of reports you selected for the **Report** navigation drop down menu for this position, click the **View Options** tab. Then click the top-level report structure, and the reports will be listed in the box on the left, as shown in Figure 27.
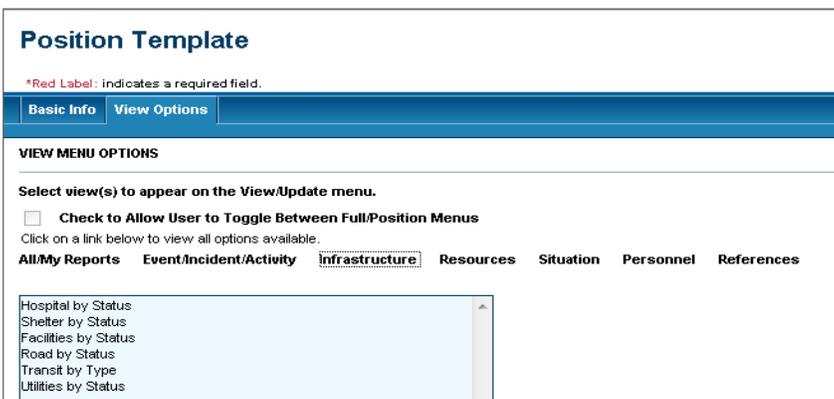
Figure 27 View Options Tab in *View* Mode

At this point, you have created the report list that will appear in the **Report** navigation drop down menu for this position. The next step is to assign the **Position Template** to a position in the **References Organization Position** report type.

3.5 Updating a Position Template

To change the content of an existing **Position Template**, click the **Template Name** link in the **Position Template by Name** summary screen. The Position Template will be presented to you. Click the **Update** button in the upper right of the form to make the required changes.

Updates made to a **Position Template** take effect immediately; however, a user already logged onto the system will not see the changes until they do one of the following:

- Change the position in their Personal Profile.
- Refresh the browser window.
- Log in to the system again.

When you have completed the information, click the **Submit** button in the upper right corner of the form to save the report.

With the **Position Template** in *view* mode, you may also use the control button in the upper right to:

- **Update** button – Click the | Update | button to open the report in Edit mode to update and edit the data fields.

- **Delete** button – Click the | Delete | button to delete this report from active view. This report will be maintained for viewing, but not updating in History.

- **Print** button – Click the | Print | button to send the report to the printer.

🗁 Note: To change which **Position Menu** is displayed when you log on to the system, change the position indicated in the Personal Profile to the position that has been displayed in the Data Dictionary Position Menu Template.   Users who change the position on their Personal Profile document during a session will see the menu associated with the new position after submitting the updated profile document.

🗁🗁 For more information about Personal Profiles refer to Module: Personal Profile.

4 Assigning a Position Template

After completing the Position Template, you must assign it to the position for which it was created. This allows the Position Template to be activated so users can see and use the individually configured menu. You can assign a new or modified Position Template to an existing position or to a new position.

4.1   Adding a Position Template to an Existing Position

To assign a **Position Template** to an existing position:

1   Select **Organization Chart** (under References top-level report structure) from the **Report** navigation drop down menu.

2   From the **Organization Charts** summary screen, find the organization and expand its **Organization Chart**, as shown in Figure 28.

The expanded **Organization Chart** identifies the organization and its positions.

> 📁
> References is the top-level report structure for the Organization Chart.

Figure 28 Organization Charts Summary Screen

3   Click the <u>Name</u> link of a **Position** within the organization.

This will open the **Organizational Element** in *View* mode. Here you can see which **Menu Template**, if any, is assigned to this Position, as shown in Figure 29.
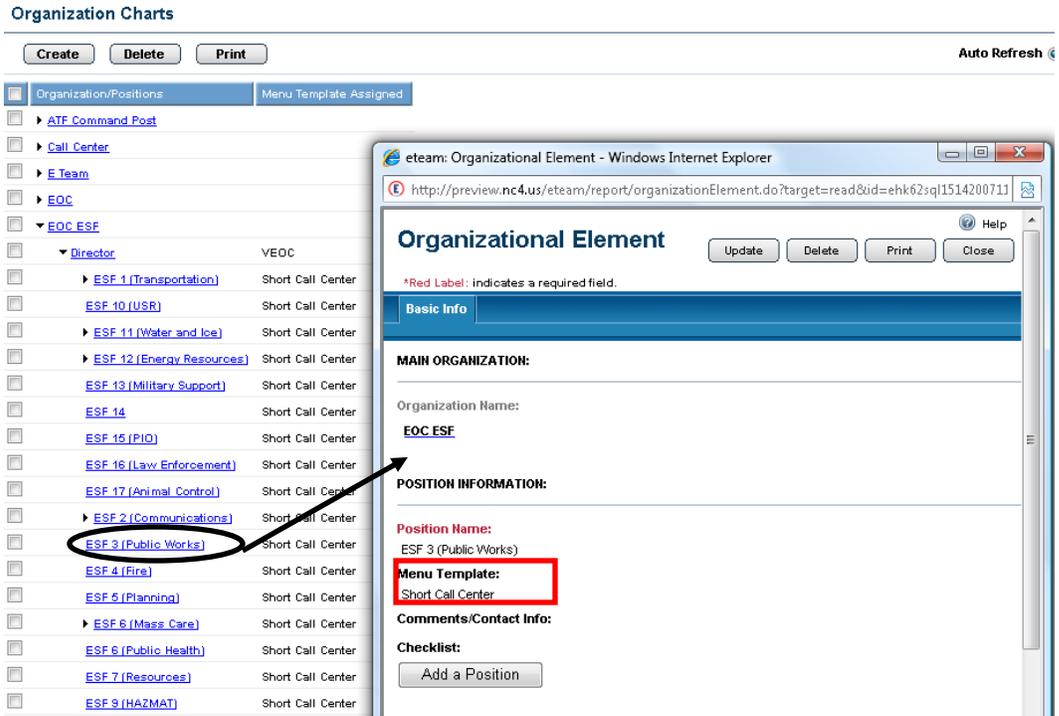
Figure 29 Viewing an Organizational Element

4   Click   the   [Update]   button   to   open   the   **Organizational Element** form to update the **Menu Template** field.

5   Click the **Select** button to the right of the **Menu Template** field to open the **Menu Template** dialog box as shown in Figure 30.
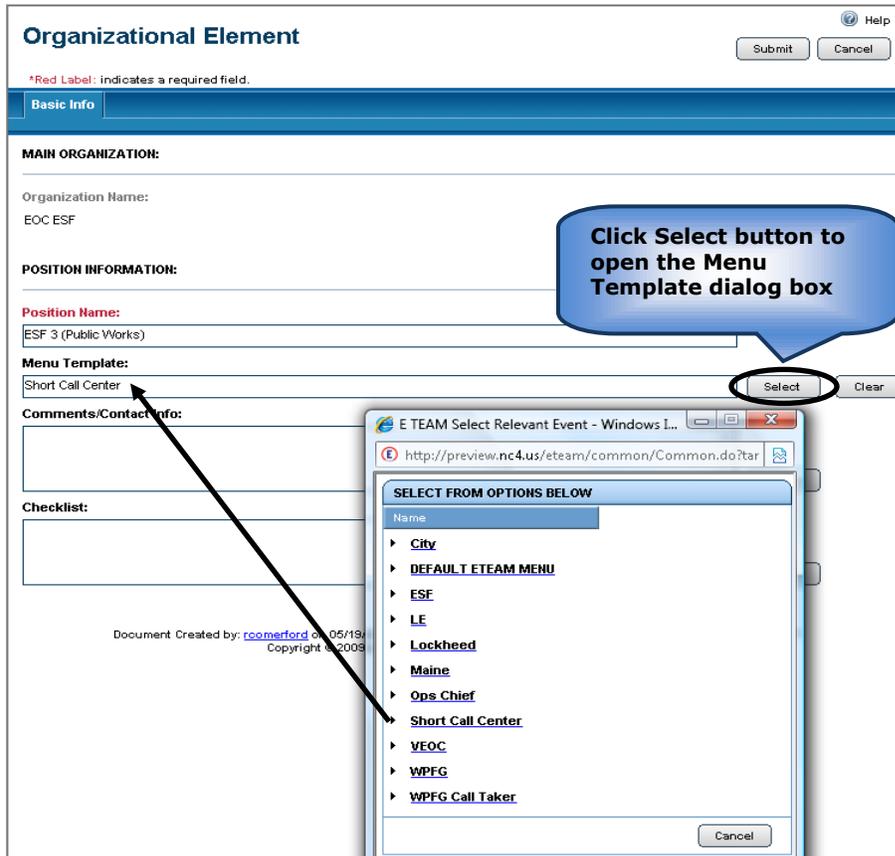
Figure 30 Menu Template Dialog Box

6   Click the **Menu Template** Name link to populate the Menu Template field.

7   Click the **Submit** button in the upper right to save your changes.

The **Position** with its associated **Menu Template** is now available for use in the system.

4.2   Adding a Position Menu to a new Position

Assigning a Position Based Menu also occurs when a new position is added to an organization chart. Assigning a **Position Template** when creating a new position is accomplished in the same manner as assigning a **Position Template** to an existing position.

To assign a **Position Template** to a new position in an existing organization:

1   Select **Organization Chart** from the **Report** navigation drop down menu.

A list of existing organizations with organization charts displays in the **Organization Charts** summary screen.

2   Click the Expand All link to the right of the Organization Charts Name in the summary screen to expand all levels of the organization, as shown in Figure 31.

3   Click the Position Name link to open that position's **Organizational Element**.
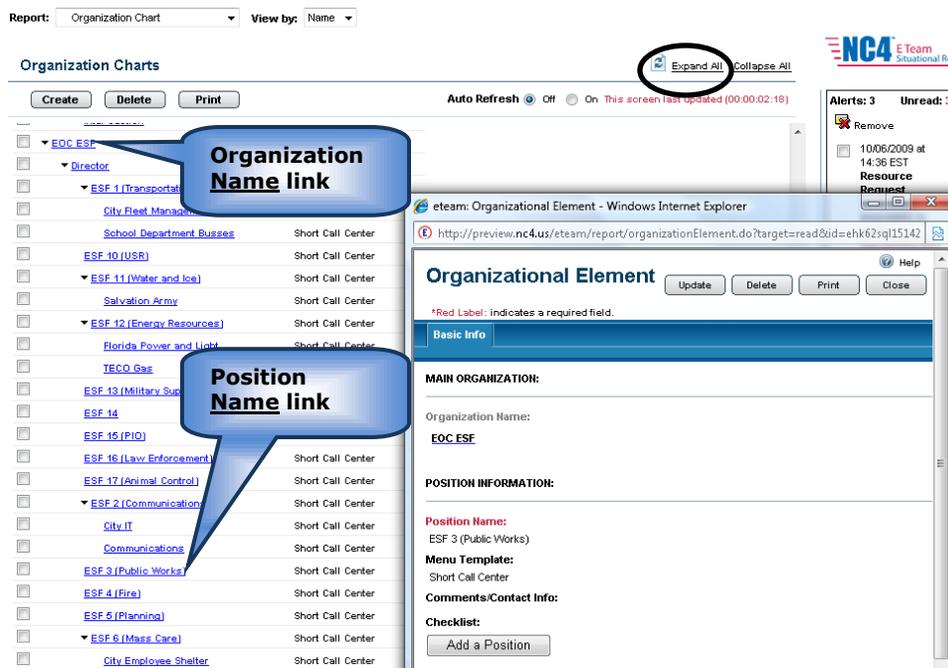
📂 Positions are added to an Organization Chart one at a time.

Figure 31 Open an Existing Organizational Element

4   Within the Organizational Element window, click the **Add a Position** button (shown above in Figure 31) to open another **Organizational Element** window for a new subordinate position as shown in Figure 32.

Figure 32 New Organizational Element Form

5   Complete the new Organization Element by entering a **Position Name** such as "ESF 10—HazMat Coordinator".

6   After entering a Position Name click the **Select** button to the right of the **Menu Template** field to open the **Menu Template** dialog box.

7   Click the <u>Name</u> link in the Menu Template dialog box to populate the **Menu Template** field.

8   Complete the **Comments/Contact Info** and **Checklist** fields with available information.

This creates a completed **Organization Element** with an associated **Menu Template** as shown in Figure 33.

Figure 33 Completed Position with Menu Template

9   Click the [Submit] button in the upper right to save the information for this Position.

The new position with the associated Menu Template is now available for use in the system.

After a Menu Template is assigned to a position, the **Position Template** will identify the assigned positions, as shown in Figure 34.

Figure 34 Position Template with Assigned Positions

After creating the **Position Template**, you must assign the menu to the position for which it was created. This allows the menu to be activated so users can use the menu. You can assign a new or modified template to an existing position or to a new position.

5 Comprehensive Exercise

In this section of the module, you will follow a step-by-step walk through of creating an Organization, adding a position and assigning a position template to a position. You will become familiar with the details of the Organization form and gain practical experience with the type of information it can contain.

Before you sign on to the application, you will need to know the name of the **Organization**, the subordinate **positions** and the **reports** that will be used by the organization.

🖥   All class participants should log on to the application and follow along step-by-step with the workbook.

✏️ *This exercise allows learners to login and create an **Org Chart**.*

In this **Org Chart** form exercise you will login to the system, and navigate to create a new Organization Report.

Remember, all red label fields are required. To complete the **Org Chart** form, please follow the steps below:

1. **Login** to the application, your **Personal Profile** form appears.

2. Click the **Submit** button in the upper right of the Personal Profile form to access the application.

3. Your **Alert Bulletin** (if any Alert Bulletins exist in the system) and **Duties Checklist** appear.

4. Read the **Alert Bulletin** to become familiar with the situation awareness.

5. Click the **Close** button in the upper right to close the Alert Bulletin.

6. Review your **Duties Checklist** to gain a better understanding of the duties assigned to your role for this activity.

7. Click the **Cancel** button in the upper right to close the Duties **Checklist** form.

8. Go to the **Report Navigation Frame**:

    a. Select **Organization Chart** from the **Report** navigation drop down menu.

b. Click the **Create** button on the Organization Charts summary screen. You are presented with the Organization Chart form.

9. Go to the **Basic Info tab** fields, which is the only tab on this form:

    a. Key in the name of the organization in the **Organization Name** field**.**

10. Go to the **Contact Info** field located below the Organization Name section.

    a. Key in the name, phone number and other pertinent information.

    Remember that you can click on the **Expand** link to open the **Expanded Text Window** which will allow you to include additional information.

11. Go to the **Comments** field and supply additional useful information.

12. Click the **Submit** button in the upper right to save the report in the system.

13. You will be presented with the new Organization chart in *View* mode.

14. Click the **Close** button in the upper right to close the form.

✏ *This exercise allows learners to login and* ***Add a Position to an Organization Chart****.*
In this Organization Chart-Add a Position form exercise you will access the **Add a Position** button to add positions to an existing **Organization Chart**.

Remember, all red label fields are required. To **Add a Position**, please follow the steps below:

1. Select **Organization Chart** from the **Report** navigation drop down menu.

2. Click the <u>Name</u> link of the Organization.

    a. Click the **Add a Position** button in the **Current Positions** section.

3. Key in the **Position Name**.

4. Go to **Menu Template** which is below the **Position Name** field.

    a. Click the **Select** button to open the Menu Template Name list.

      b. Click the <u>Name </u>link of the desired template.

5. Go to the **Comments/Contact Info** field and key in pertinent information.

    Remember that you can click the **Expand** link to open the **Expanded Text Window** which will allow you to include additional information.

6. Go to the **Checklist** section.

      a. Key in four duties that the position is required to perform.

7. Click the **Submit** button in the upper right to save the report in the system.

Repeat the process by clicking the original organization chart to add more positions to the organization chart at this level.

✏*This exercise allows learners to login and **Create a Position Template**.*

In this **Position Template** exercise, you will navigate to create a **Position Template.**

Remember, all red label fields are required. To complete the **Position Template** form, please follow the steps below:

1. Go to the **Report Navigation Frame**:

      a. Select **Position Template** from the **Report** navigation drop down menu.

      b. Click the **Create** button on the **Position Template By Name** summary screen. You are presented with the **Position Template** form.

2. Key in the **Template Name** in the assigned field.

3. Key in the description of the position template in the **Description** field.

4. Go to the **View Options tab.**

5. Go to the **View Menu Options** section.

6. Click the **All/My Reports** <u>Name</u> link.

7. Click the **All>>** button to select all the reports in **All/My Reports**.

8. Click the **Event/Incident/Activity** <u>Name</u> link.

9. Click the following report <u>Name</u> links:

    a. Incident by Name

    b. Incident by Status

    c. Emergency Event by Name

    d. Emergency Event by Status

    e. Alert Bulletin by Date/Time

10. Click the **Submit** button in the upper right to save the report in the system.

✎ *This exercise allows learners to login and **Assign a Position Template** to a position.*

To assign a menu template to an existing position, follow these steps:

1. Select **Organization Chart** from the **Report** navigation drop down menu.

2. Click the triangle icon of the organization until you arrive at the <u>Name</u> link of the position.

    a. Click the <u>Name</u> link of the Position.

    b. Click the **Update** button in the far right of the form.

3. Validate that the correct position name is in the field.

    a. Go to **Menu Template** which is below the **Position Name** field.

    a. Click the **Select** button to open the Menu Template Name list.

    b. Click the <u>Name</u> link of the desired template.

4. Click the **Submit** button in the upper right to save the report in the system.

    a. Review the Organization Template form to ensure that the correct template has been added.

    b. Click the **Close** button in the upper right to return to the center view frame.

6 References-Sites

6.1 Site References

The Site form is used to identify local sites for use in geo location functions. Critical sites can be pre-loaded into the system or you can create a list of fixed sites and their locations. Sites from this list can then be accessed in the location section of any report. These sites include critical infrastructures, airports, or any other site that you may need to reference.

6.1.1 Creating a new Site Reference:

1   Select **Site** from the **Report** navigation drop down menu as shown in Figure 35.
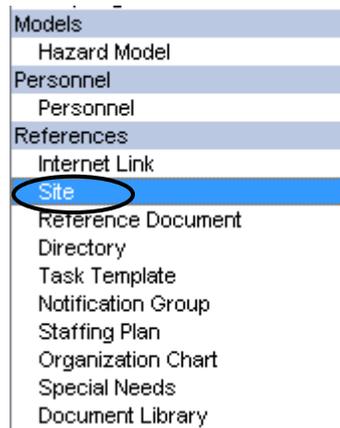

Figure 35 Site in Report Navigation Drop Down Menu

2   Click the **Create** button on the **Site** summary screen.

The new **Site** References form will open as shown in Figure 36.

Figure 36 New Site References Form

6.1.1.1   SITE REFERENCE – CRITICAL INFORMATION

The top section of the **Site** References form contains the following fields:

- Site Name

- Responsible Agency

- Site Type

- Critical Facility Priority Level

- Critical Facility

Site Name and **Site Type** are required fields; key in this information or click the Search/Add link to select from the available **Site Types**. Use the **Responsible Agency** drop down menu or click the Search/Add link to add an agency to this field.

Complete the section by clicking the **Yes** or **No** radio button to indicate whether this is a **Critical Facility**, and by making a selection from the **Critical Facility Priority Level** drop down menu.

The completed **Site References Critical Information** section is shown in Figure 37.

Figure 37 Site References - Critical Information

6.1.1.2   CONTACT INFORMATION FOR THIS SITE

The **Site** References form also provides a section to indicate Contact Information for individuals at this location, as shown in Figure 38. Key available contact names and telephone numbers into the **Contact Name** and **Contact #** fields. Up to 10 contacts can be added to this report form.

Figure 38 Contact Information for this Site Fields

6.1.2   Completing a Site Reference Report

Completing the geo location information will allow you to use the site for geo location purposes. Complete the other data sections in the Geo-Location, Attachments & Overlays and Distribution & Sharing tabs, if appropriate. They are covered in Module: Common Functions.

Figure 39 Completing a Site References Report

Click the Submit button to save the **Site** References Report then click the **Close** button in *View* mode to return to the **Site** summary screen.

You will see the Update Delete Print Close buttons in the upper right of the Site References form depending on your access level and discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy, and the **Close** button to close the report window.

📁 Deleted reports are removed from active lists but are maintained in history.

6.1.3   Using a Site Reference

After a Site Reference has been saved, it can be accessed by clicking a Select Site link in a report's **Geo-Location** tab in *Update/Edit* mode. Figure 40 shows a **Site** Name field in an Incident Report populated by a saved Site Reference. The report's location fields will be automatically populated by the information for the Site Reference.
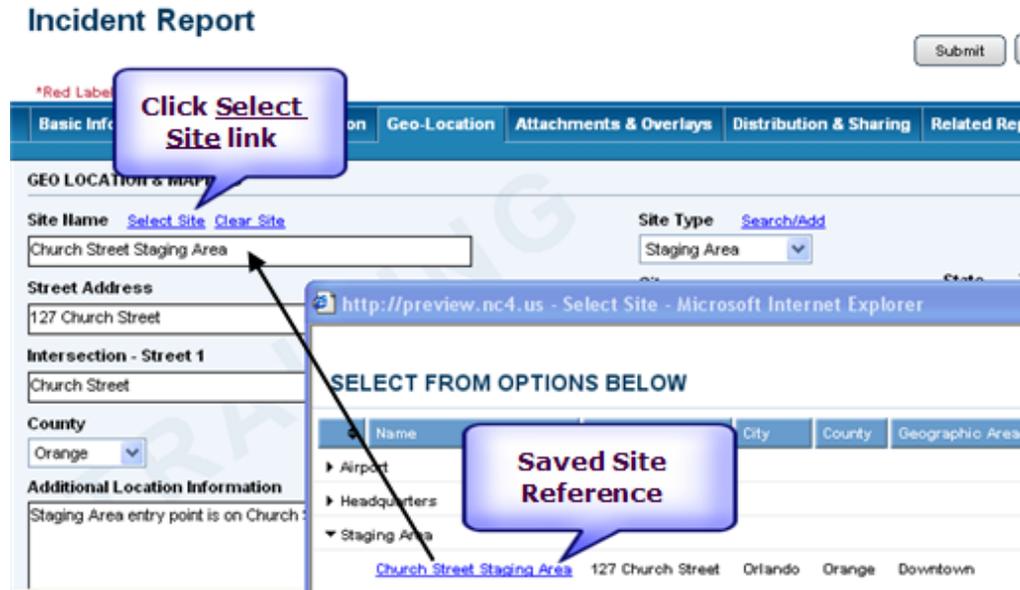

> 🗁 A Report's site location fields are auto-filled by the Site References information.

Figure 40 Site Reference in Incident Report

7 References-Documents

7.1 Reference Documents

Reference Documents are used to create a document library for storage and retrieval. All plans, checklists, SOPs, and other reference material including courseware documents can be electronically stored within the system. For example, the Reference Document can be used for easy access to a jurisdiction's emergency management planning documents.

7.1.1 Creating a Reference Document

1   Select **Reference Document** from the **Report** navigation drop down menu as shown in Figure 41.
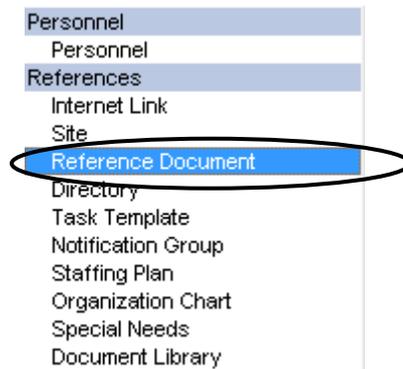
**Figure 41 Reference Document in
Report Navigation Drop Down Menu**

2   Click the [Create] button on the **Reference Document** summary screen.

The new **Reference Document** form will open as shown in Figure 42.

Figure 42 New Reference Document

7.1.1.1   REFERENCE DOCUMENT BASIC INFO FIELDS

The Reference Document form contains the following fields:

- Category

- Title

- Comments

Category and **Title** are required fields. Click the Select/Add link to make a selection from the available **Categories** in the dialog box or key the new category into the **Other** field and click the **Add** button, as shown in Figure 43.
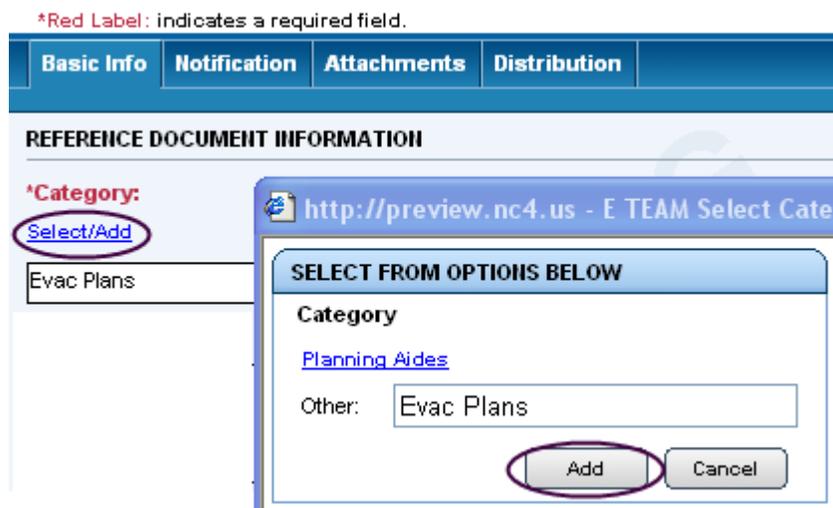

Figure 43 Category Dialog Box

Key the information into the **Title** and **Comments** fields. If more space is required for your comments, click the **Update** button to open the date and time stamped **Expanded Text Window**.

7.1.2   Completing Reference Documents w/o Attachments

Complete the data sections in the **Notification** and **Distribution** tabs, if appropriate. **Notification** and **Distribution** are covered in the Module: Common Functions.

The Reference Document form must be created, submitted, and available in *View* mode before a document can be added in the Attachments tab.

Click the Submit button to save the Reference Document as shown in Figure 44.

> 🖙 The Reference Document form must be available in *View* mode before you can attach a document.

> 🗁 Notification and Distribution are covered in the Module: Common Functions.

Figure 44 Completing a Reference Document Form

7.1.3   Adding an Attachment to Reference Document

To add documents to the **Attachments** section of a **saved** Reference
Document:

   1   Select **Reference Document** from the **Report** navigation drop down
      menu.

   2   Click the <u>Name</u> link of the **Reference Document** in the **Title** field on
   the summary screen as shown in Figure 45.

Figure 45 Opening a Reference Document in *View* Mode

3   Click the **Attachments** tab on the Reference Document form.

4   On the **Attachments** page, click the [Add From File] button as shown in Figure 46 to add a document from a file.

Note that if the document can be found in the Document Library; click the [Add From Library] button as shown in Figure 46. The Add From Library button will be discussed in step 7.
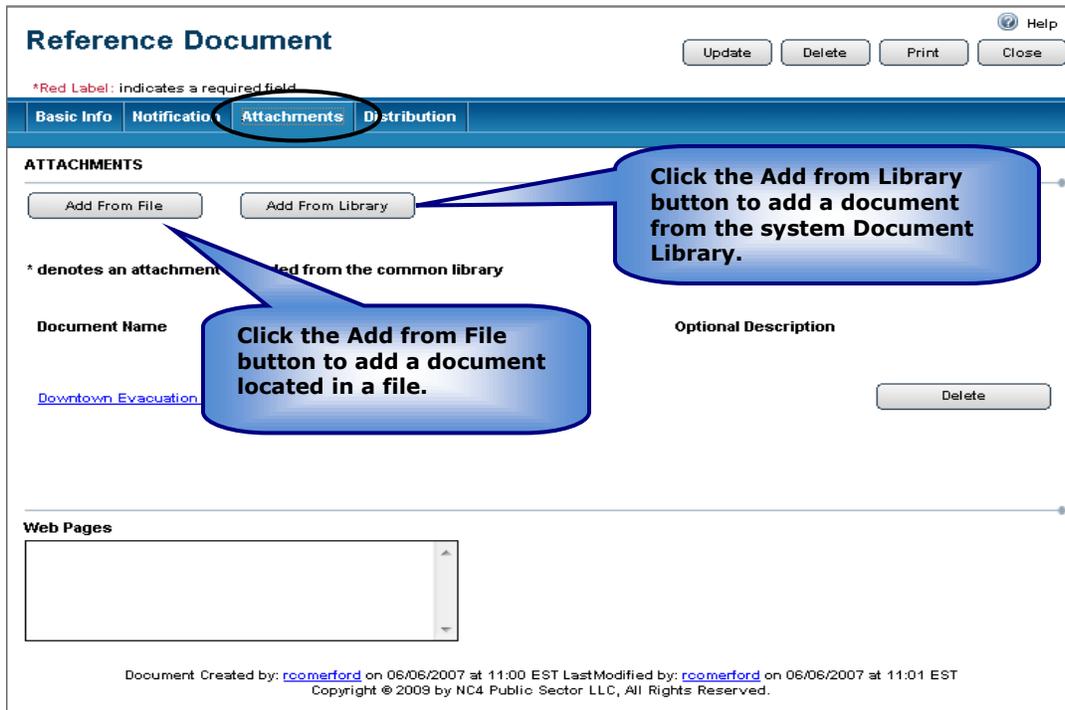

Figure 46 Attachments Tab

This action opens a new window as shown in Figure 47.
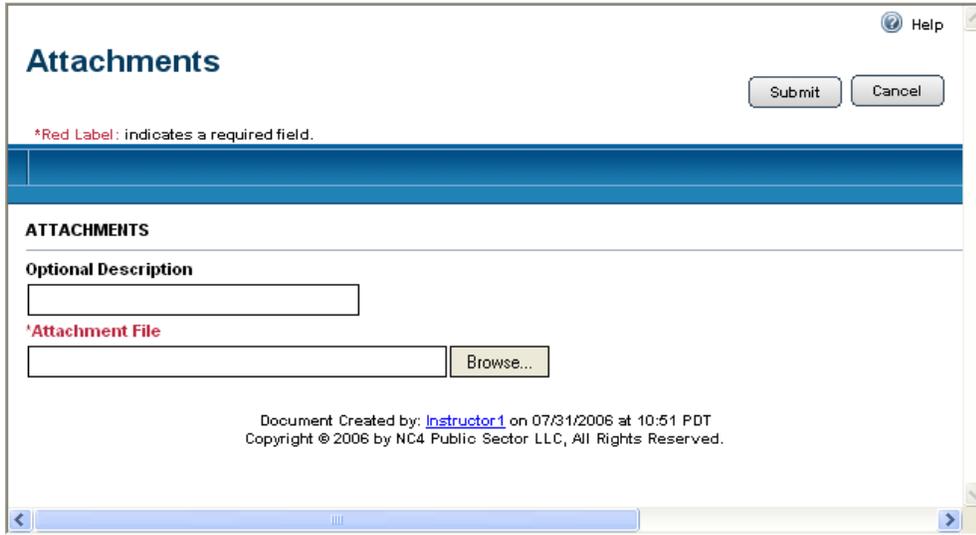
Figure 47 Attachments Add from File Window

5   Enter a description in the **Optional Description** field, then click the [Browse...] button to select a file from your personal computer or file server, as shown in Figure 48.
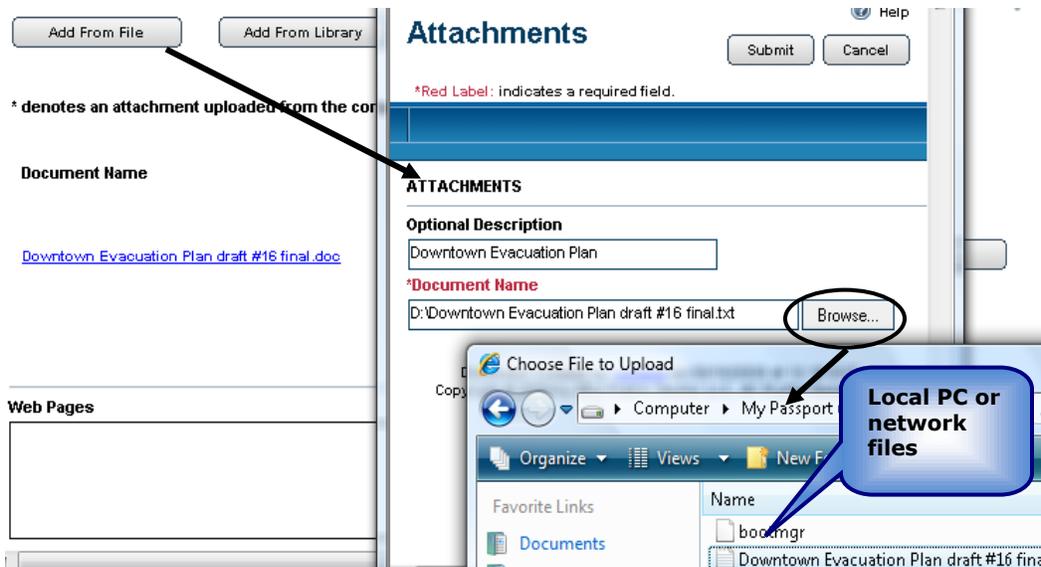

Figure 48 Attaching a File

6   After selecting a local or network file, click the button to save the completed Reference with attachment. The **Attachments** window will immediately close and return you to the **Reference Document Basic Info** tab in *View* mode.   Click the **Attachments** tab to view the document <u>Name</u> link for the Reference.

7   To select a document from the Document Library, click the button. This opens the **Document Library** window as shown in Figure 49.

The Document Library is discussed in more detail in Module: Workbook.

Figure 49 Document Library screen

8   Click the checkbox for the document you wish to add.

9   Click the button to attach the reference document from the **Document Library** as shown in Figure 49.   The **Attachments** window will immediately close and return you to the Reference Document **Basic Info** tab in *View* mode.   Click the **Attachments** tab to view the document <u>Name</u> link.

7.1.4   Viewing an Attachment in Reference Document

The **Reference Document** form appears in *View* mode after it has been saved with an attachment. Clicking the **Attachments** tab as shown in Figure 50, shows the Name link for the attached file.
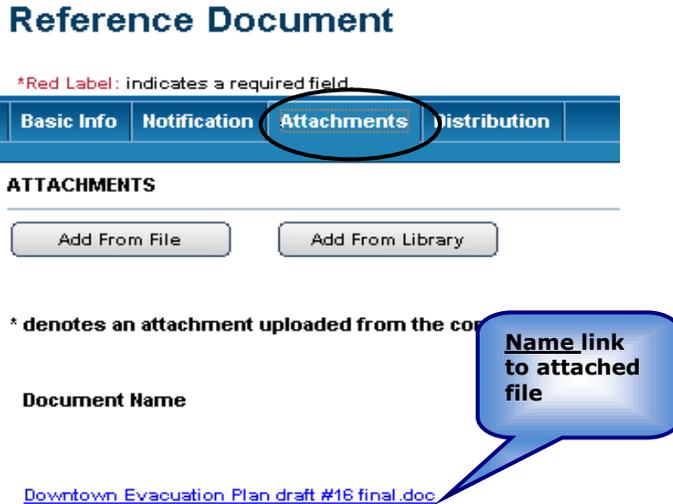
Figure 50 Name Link and Delete button to Attached File

Clicking the Name link as shown in Figure 50 will open the document provided the PC has the required software installed as shown in Figure 51.
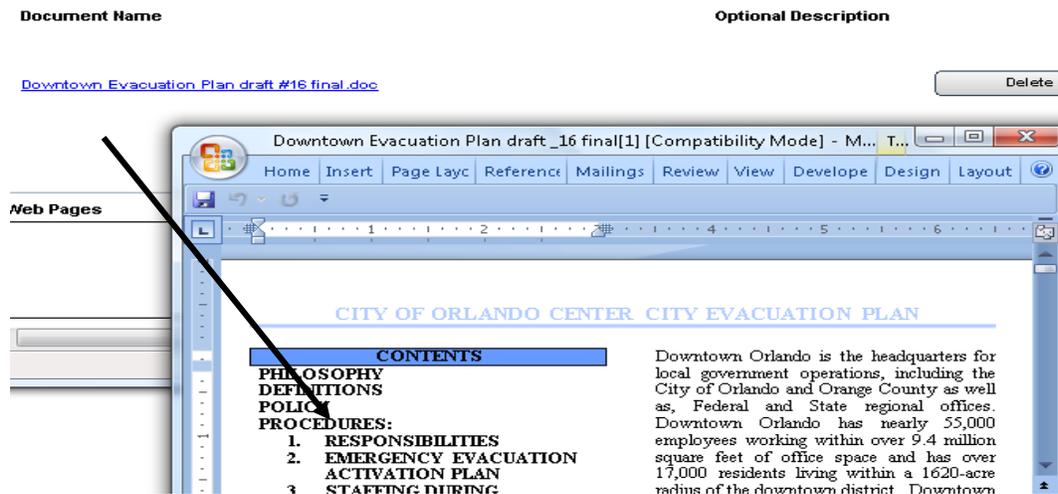

Figure 51 Opening an Attachment

Close the document based on the software used to view the document when you have completed the review of the attached files.

7.1.5   Deleting an Attachment in Reference Document

Click the [Delete] button that corresponds to the document as shown in Figure 52 to remove any reference documents that have been attached.

Figure 52 Deleting an Attachment
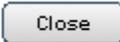
You will see the [Update] [Delete] [Print] [Close] buttons in the upper right of the Reference Document form in *View* mode depending on your access level and discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy, and the **Close** button to close the report window.

8 References-Task Template

Task Templates provide a template to create action plans to support tasks and sub tasks. The process to use the action plan in reports is as follows:

- A generic version of the action plan is created in **Task Template**. The template can be selected to populate any of the reports that have a field labeled **Action Plan**.

- By selecting the task template in the Action Plan field, the template is attached to an event, incident or activity. The selected task travels with the event, incident or activity report.

- **Task Template** forms are created in the **References** report structure and cannot be accessed from the **Tasks** report structure.

- Users can then update the tasks and sub tasks templates to reflect the actual incident or activity.

8.1 Creating a Task Template

To create a new Task Template, perform the following steps:

1 Select **Task Template** from the **Report** navigation drop down menu.
2 Click the ⬚Create⬚ button from the **Task Templates by Name** summary screen.
3 A **Task Template** opens in a new window as shown in Figure 53.

> 🗀 *Red Label indicates a required field.

Figure 53 Task Template Form

> 🗀 Scroll down to see all the fields in the Task Template form.

The form contains many fields, some of which you must scroll down in the window to view. Required fields are noted by a red asterisk (*).

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8.2 Task Template Fields

We will address each of the categories and fields as they appear.

8.2.1 Priority/Assign Task/Task Detail/Related Sub Tasks

8.2.1.1   PRIORITY

Select from the choices under the **Priority** drop down menu, as shown in Figure 54, such as "Black-Flash," "Red-High," "Green-Low," etc.
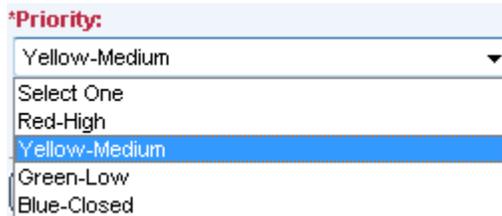

Figure 54 Task Template Priority Menu

8.2.1.2   ASSIGN TASK

In this section of the form there are fields relating to the individual or organization to which the task is being assigned, as shown in Figure 55. When you choose an **Individual, Organization/Location, Position** or **Agency** from the system lists, all available system profile data will be used to automatically populate the other responsibility fields. To change the responsibility, click the **Clear Responsibility** button to clear all the fields. To forward the task to a selected Individual ONLY, Uncheck the box.
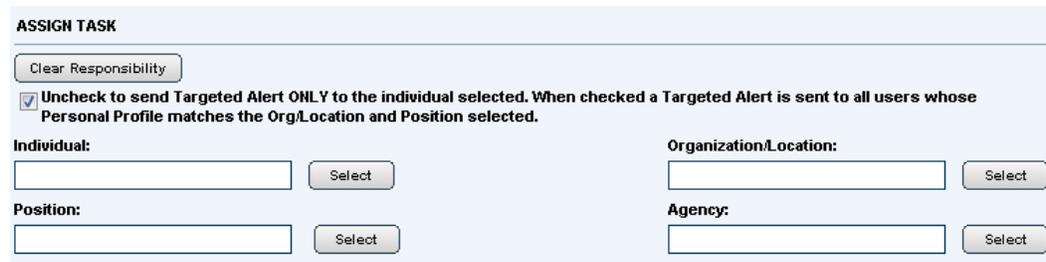
Figure 55 Assign Task Fields

8.2.1.3   TASK DETAIL

The **Task Detail** section contains fields to place information to assist with capturing the **Requestor's** information, the **Template Name**, **Task Category** and **Additional Task Details**, as shown in Figure 56.


Figure 56 Task Detail Fields

Key in the requestor's information and any required information using the **Search/Add** button or the associated drop down menu for the **Task Category**. Provide any additional information in the **Additional Task Details** field and document any concerns in the **Concerns** field.

8.2.1.4   RELATED SUB-TASKS

This field will populate with a **Sub Task** button after you have clicked **Submit** and the form is presented to you in *View* mode, as shown in Figure 57.


Figure 57 Related Sub-Tasks Field

Section 8.4 guides you through completing the **Sub-Task Template**.

8.3 Completing the Task Template form

When you have completed the **Task Template** form with the information you have available, click the [Submit] button in the upper right to save the report. The report is then available from the *View*/Update mode.

The other data sections in the Notification, Attachments and Distribution form tabs are covered in Module: Common Functions.

8.4   Creating a Sub Task Template

To create a new Sub Task Template, perform the following steps:

1   Select **Task Template** from the **Report** navigation drop down menu.
2   Select the appropriate **Task Template** by clicking its corresponding **Name** link.
3   Scroll to the end of the report to see the **Add Sub-Task Template** button.
4   Click the **Add Sub-Task Template** button.
5   A **Sub Task Template** opens in a new window as shown in Figure 58.

📂 *Red Label indicates a required field.

Figure 58 Sub-Task Template Fields

Note that the **Related Action Plan Template** field has been populated with the **Task Template** name. This defines the association with the Task Template.

6   Complete all the information fields which are similar to the **Task Template** report fields.
7   Click the **Submit** button to save the **Sub-Task Template** report.
8   The **Sub-Task Template** report can be viewed using the **View by** sort option under **Task Template**. Select **Sub Task Template History** from the drop down menu as shown in Figure 59.


Figure 59 Sub-Task Template Summary listing