



Welcome to NC4 Training

Module: References

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1 Module: References

References are made available to assist with the effective handling and resolution of Events/Incidents/Activities. References are different sources of information or tools that can be pre-loaded into the Reference section for retrieval by all personnel using the system. The required access rights enable you to create and update certain reference data in the NC4 application.

The References listed here are covered in more detail in the Module: Configuration.

- Site
- Reference Documents
- Task Template

Learning Objectives

After completing this module, learners will be able to:

- Create, view and update References.
- Describe the elements of the various References.

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.

ICON KEY

	Valuable information
	Test your knowledge
	Keyboard exercise
	Review

2 General Overview of References

This section of the module provides an overview of some of the available references. You will become familiar with the various reference types and understand the information they contain.

References are accessed by selecting the appropriate references in the Report navigation drop down menu as shown in Figure 1. We will explore each reference category in detail.

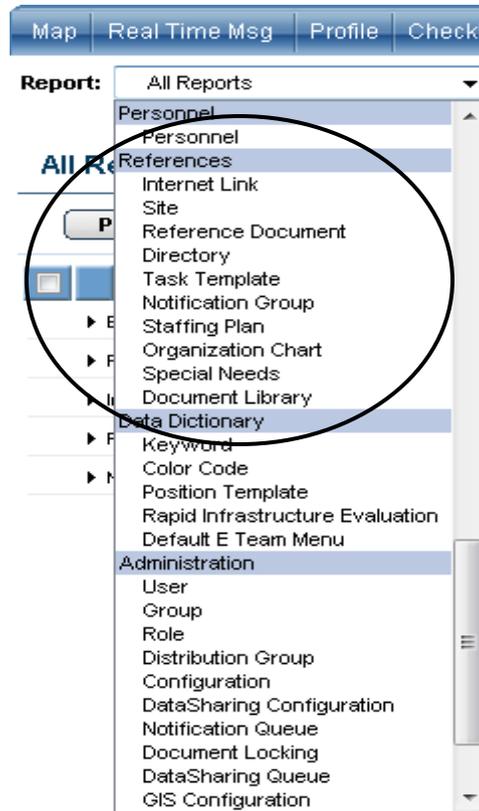


Figure 1 References in Report Navigation Drop Down Menu

2.1 Reference Types

The Reference types include:

2.1.1 Internet Link

This Reference type allows you to enter and store URLs to websites of interest so that other users can access them from within the system. You can create and view a listing of important Internet sites. These critical web sites can assist in monitoring the overall situation and provide vital planning information. Examples include weather sites, the jurisdiction's governmental web site, news sites, etc. The full URL is the required format.

2.1.2 Site

Critical sites can be pre-loaded 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, airports, or any other site that you may need to reference.

Site is covered in the Module: Configuration

2.1.3 Reference Document

The NC4 application is a library for all personnel utilizing the system enabling you to store and retrieve documents. All plans, checklists, SOPs, and other reference material can be electronically stored within the system. The documents must be provided in an electronic format for storage.

Reference Document is covered in the Module: Configuration

2.1.4 Directory

The Directory provides a single location to lookup, track and maintain Users (those with a system login ID) and Non-users (persons without a system login). The Directory supports tracking contact information, skill sets and availability. The information in this directory can be accessed through Notification (Individual and Groups), Distribution and Responsibility sections.

2.1.5 Task Template

Task Templates provide a template to create tasks that can be reused and assigned for multiple Action Plans without entering a completely new task each time.

Task Templates is covered in the Module: Configuration



2.1.6 Notification Group

Notification Groups provide the ability to create lists of email addresses for system notifications. The groups created can be accessed in the Notification section of a report.

2.1.7 Staffing Plans

Staff scheduling allows you to create, store and modify schedules. Staffing Plans provide the means to determine a schedule for an Organization and can be viewed based on the Date, Person, or Organization.

2.1.8 Organization Chart

Organization Charts provide the method to identify the various organizations and the positions within them. 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 checklists for each level or position.

Organization Chart is covered in the Module: Configuration

2.1.9 Special Needs

Special Needs provides a listing of individuals with their contact information who have special care needs within the community. The system also provides the ability to map an individual's location or provide alerts regarding the individual in times of emergency.

2.1.10 Document Library

The NC4 application provides system storage for documents that can be associated with a report. The documents must be provided in an electronic format for storage. Using the Attachments section of a report form, a user can attach documents in a folder format.



3 Reference Categories

In this section of the module, you will follow a step-by-step walk through of the various References. You will become familiar with the details of the References forms and gain practical experience with the type of information they can contain. We will summarize the unique fields used in these forms.

3.1 Internet Link

This Reference allows you to enter and store URLs to websites of interest so that other users can access them from within the system. You can create and view a listing of important Internet sites. These critical websites can assist in monitoring the overall situation and provide vital planning information. Examples include weather sites, the jurisdiction's governmental website, news sites, etc. The full URL is the required format.

3.1.1 Viewing Internet Links

Internet Links are viewed in the summary screen after selecting Internet Link from the **Report** navigation drop down menu as shown in Figure 2, and are sorted alphabetically by **Category**.

Report: View by:

Internet Links by Category

<input type="checkbox"/>	Category	Name	URL	Updated At
	▶ EM agencies			
	▶ News			
	▶ Weather			

Figure 2 Internet Links Summary Screen



Expand a **Category** in the Internet Links summary screen by clicking the  icon as shown in Figure 3.

Report: View by:

Internet Links by Category  [Expand All](#) [Collapse All](#)

Auto Refresh Off On This screen last updated (00:00:00:51)

 Category	Name	URL	Updated At
▶ EM agencies			
▶ News			
<input checked="" type="checkbox"/> Weather			
<input type="checkbox"/>	Melbourne Weather	http://www.srh.noaa.gov/mlb/	06/24/2009 at 15:18 EST
<input type="checkbox"/>	The Weather Channel	http://www.weather.com	07/07/2009 at 11:59 EST
<input type="checkbox"/>	NHC Miami	http://www.nhc.noaa.gov/index.shtml	05/18/2007 at 23:41 EST

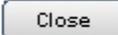
Internet Link Name

Internet Link URL

Figure 3 Internet Links Expanded

Clicking the Name link in the **Name** column will open the information page for that link in *View* mode, as shown in Figure 4.

Figure 4 Internet Link Report form in View Mode

You will see the     buttons in the upper right of the **Internet Links** 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.

3.1.2 Opening Internet Links

From the **Internet Links** summary screen, clicking the URL Name link will launch (open) that URL in a new web browser window, as shown in Figure 5. Note that the new window opens independently of the NC4 application and should be closed when you have completed your task.



The Internet Link Reference opens in a new browser window. Close it when you have completed your task.

Figure 5 Opening an Internet URL link

3.1.3 Creating a New Internet Link

- 1 Select **Internet Link** from the **Report** navigation drop down menu.
- 2 Click the **Create** button on the **Internet Links** summary screen, as shown in Figure 6.



Figure 6 Create a New Internet Link

A new **Internet Links** form opens as shown in Figure 7.

Figure 7 New Internet Links Form

3.1.3.1 CATEGORY, NAME, URL AND DESCRIPTION

The **Internet Links** form contains instructions on how to complete the form. The form contains the following fields:

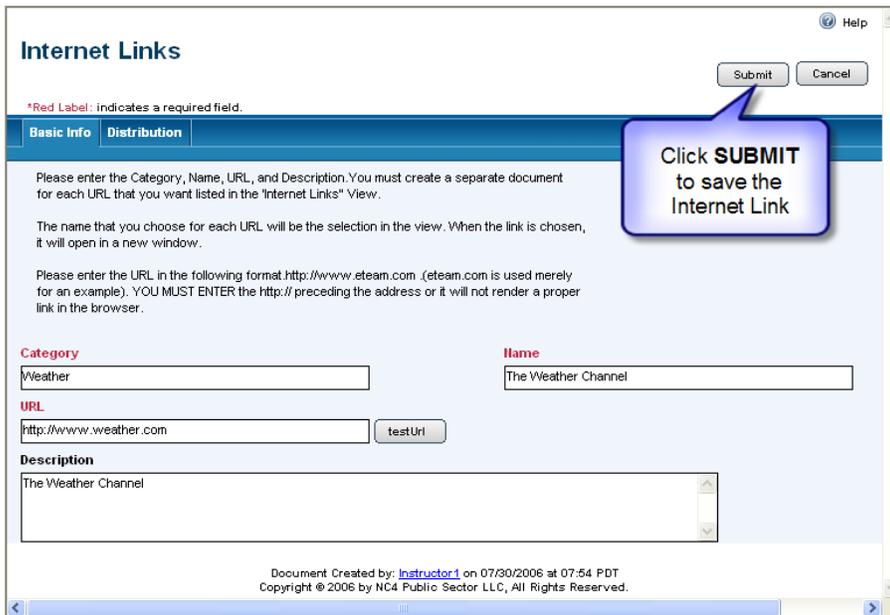
- Category
- Name
- URL
- Description

3.1.4 Completing an Internet Link

Category, Name, and URL are required fields; key in this information as well as a description of the internet link in the **Description** field. Click the button to test the Internet URL. A valid URL will open the website in a pop-up window.

Click the **Submit** button to save the Internet Link as shown in Figure 8, then click the **Close** button in *View* mode to return to the Internet Link summary screen as shown in Figure 2.

 *Red Label indicates a required field.



The screenshot shows a web browser window titled "Internet Links". At the top right, there are "Submit" and "Cancel" buttons. Below the title bar, a red asterisk icon is followed by the text "*Red Label: indicates a required field." The form has two tabs: "Basic Info" (selected) and "Distribution". The "Basic Info" tab contains the following fields:

- Category:** A text box containing "Weather".
- Name:** A text box containing "The Weather Channel".
- URL:** A text box containing "http://www.weather.com" and a "testUrl" button.
- Description:** A text area containing "The Weather Channel".

A callout box with a blue border and a speech bubble icon points to the "Submit" button, containing the text "Click SUBMIT to save the Internet Link". At the bottom of the form, there is a footer: "Document Created by: [Instructor1](#) on 07/30/2006 at 07:54 PDT. Copyright © 2006 by NC4 Public Sector LLC, All Rights Reserved."

 Distribution is covered in the Module: Common Functions.

Figure 8 Saving an Internet Link

3.2 Site Reference

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.

3.2.1 Creating a new Site Reference:

- 1 Select **Site** from the **Report** navigation drop down menu as shown in Figure 9.

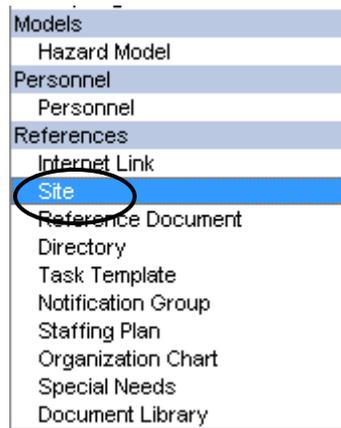


Figure 9 Site in Report Navigation Drop Down Menu

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

The new **Site** References form will open as shown in Figure 10.

The screenshot shows a web form titled "Site" with a "Help" icon in the top right. Below the title are "Submit" and "Cancel" buttons. A legend states: "*Red Label: Indicates a required field." The form has four tabs: "Basic Info", "Geo-Location", "Attachments & Overlays", and "Distribution & Sharing". The "Basic Info" tab is active, showing the following fields:

- CRITICAL INFORMATION**
 - Site Name** (text input field)
 - Responsible Agency** (dropdown menu with "Search/Add" link)
 - Site Type** (dropdown menu with "Search/Add" link)
 - Critical Facility Priority Level** (dropdown menu)
 - Critical Facility?** (radio buttons for "Yes" and "No")
- CONTACT INFORMATION FOR THIS SITE**
 - Fields for **Contact 1 Name** through **Contact 10 Name** (text input fields)
 - Fields for **Contact 1 #** through **Contact 10 #** (text input fields)

At the bottom of the form, it says: "Document Created by: instructor1 on 07/30/2006 at 08:08 PDT. Copyright © 2006 by NC4 Public Sector LLC, All Rights Reserved."

 *Red Label indicates a required field.

Figure 10 New Site References Form

3.2.1.1 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 the information for **Site Name**, and for **Site Type**, **Responsible Agency** and **Critical Facility Priority Level**, use the drop down menu or click the [Search/Add](#) link to populate the field.

Complete the section by clicking the **Yes** or **No** radio button to indicate whether this is a **Critical Facility**.

The completed Site References Critical Information section is shown in Figure 11.

Basic Info | Geo-Location | Attachments & Overlays | Distribution & Sharing

CRITICAL INFORMATION

Site Name
Orlando International Airport

Responsible Agency [Search/Add](#)
Orlando International Airport (GOAA)

Site Type [Search/Add](#)
Airport

Critical Facility Priority Level
High

Critical Facility? Yes No

Figure 11 Site References - Critical Information

3.2.1.2 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 12. 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.

CONTACT INFORMATION FOR THIS SITE	
Contact 1 Name Bill Weaver, Ops Director	Contact 1 # 321-222-1111
Contact 2 Name Steve Shaffer, TSA Director	Contact 2 # 407-999-2233
Contact 3 Name	Contact 3 #

Figure 12 Contact Information for this Site Fields



3.2.2 Completing a Site Reference Report

You must complete the **Geo Location** information to use the location information in the Site References on the Geo location Map. Complete the other data sections in the Geo-Location, Attachments & Overlays and Distribution & Sharing tabs, if appropriate. They are covered in the Module: Common Functions.

Site Help

Submit Cancel

*Red Label: indicates a required field.

Basic Info **Geo-Location** Attachments & Overlays Distribution & Sharing

CRITICAL INFORMATION

Site Name
City Hall

Site Type [Search/Add](#)
Government Facility

Critical Facility? Yes No

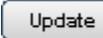
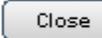
Responsibility
OPD

Critical Facility Priority Level
Select One

Tabs are covered in Module: Common Functions

Figure 13 Completing a Site References Report

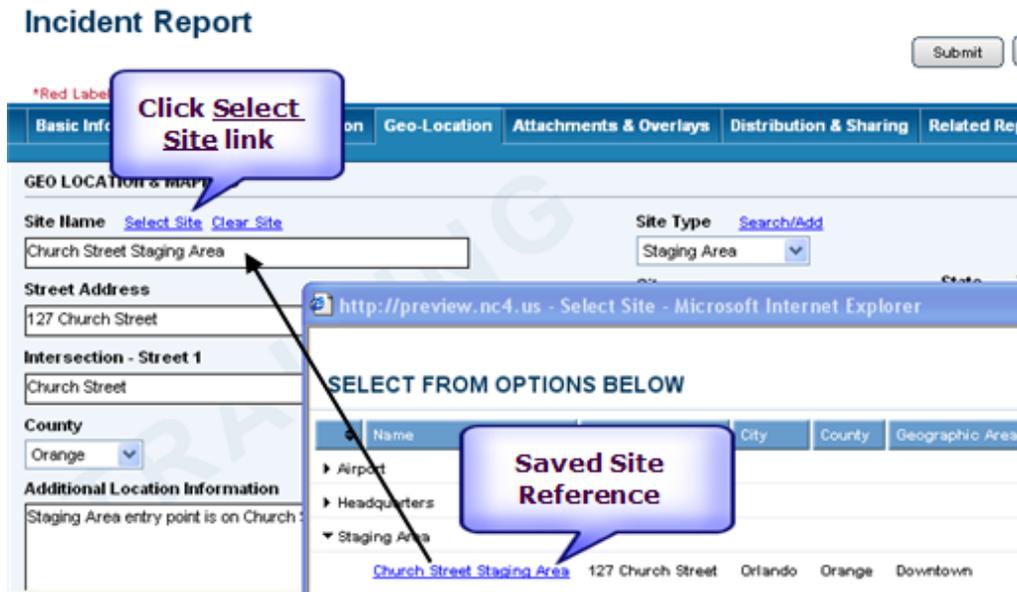
Click the  button to save the **Site References** Report then click the **Close** button in *View* mode to return to the **Site** summary screen.

You will see the     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.

3.2.3 Using a Site Reference

If you have entered the geo-location information in the site report, you can use that information where the link **Select Site** is indicated in a report. After a **Site Reference** has been saved, it can be accessed by clicking a Select Site link in a report's **Geo-Location** tab. Figure 14 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 14 Site Reference in Incident Report

3.3 Reference Document

Reference Documents are used to create a document library for storage and retrieval. All plans, checklists, SOPs, and other reference material 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.

3.3.1 Creating a Reference Document

- 1 Select **Reference Document** from the **Report** navigation drop down menu as shown in Figure 15.

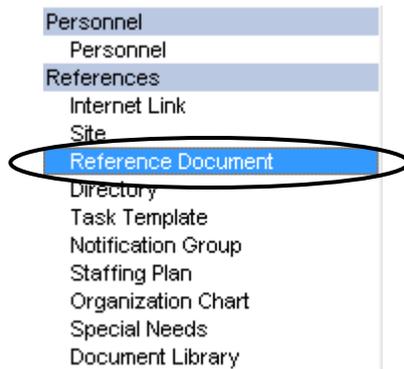


Figure 15 Reference Document in Report Navigation Drop Down Menu

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

The new Reference Document form will open as shown in Figure 16.

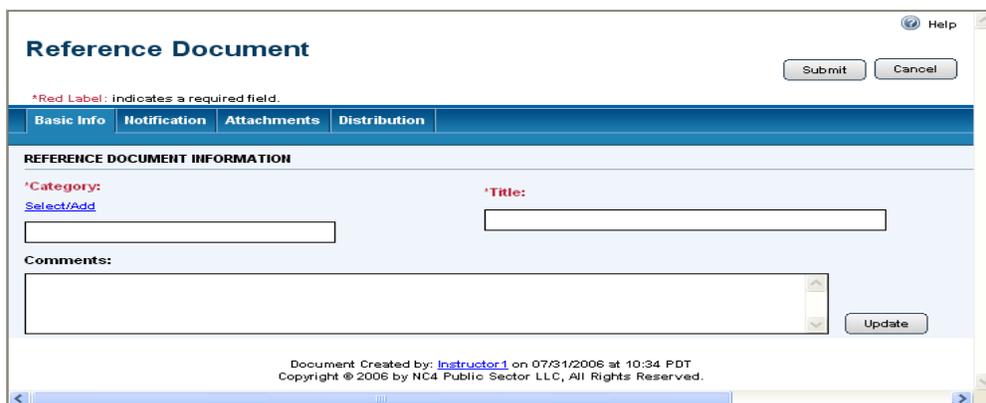


Figure 16 New Reference Document

3.3.1.1 REFERENCE DOCUMENT 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 17.

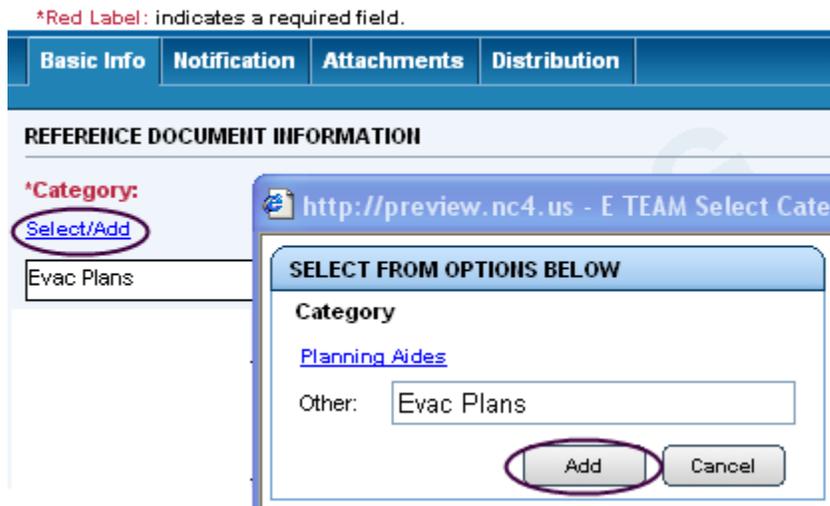


Figure 17 Category Dialog Box

Key the information into the **Title** and **Comments** fields. If more space is required for your comments, or you need to update the information, click the **Update** button to open the **Expanded Text Window**.

3.3.2 Completing Reference Documents

Complete the other 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  button to save the **Reference Document** as shown in Figure 18.

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



 *Red Label indicates a required field.

Figure 18 Completing a Reference Document Form

3.3.3 Adding a Reference Document Attachment

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 summary screen Name link of the **Reference Document** as shown in Figure 19.

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



Figure 19 Opening a Reference Document in View Mode

3 Click the **Attachments** tab on the Reference Document form. Do not click the UPDATE button. Clicking the **Update** button will suppress the **Add From File** and **Add From Library** buttons.

4 On the **Attachments** page, click the  button as shown in Figure 20 to add a document from a file.

Note that if the document can be found in the **Document Library**; click the  button as shown in Figure 20. The **Add From Library** button will be discussed in step 7.

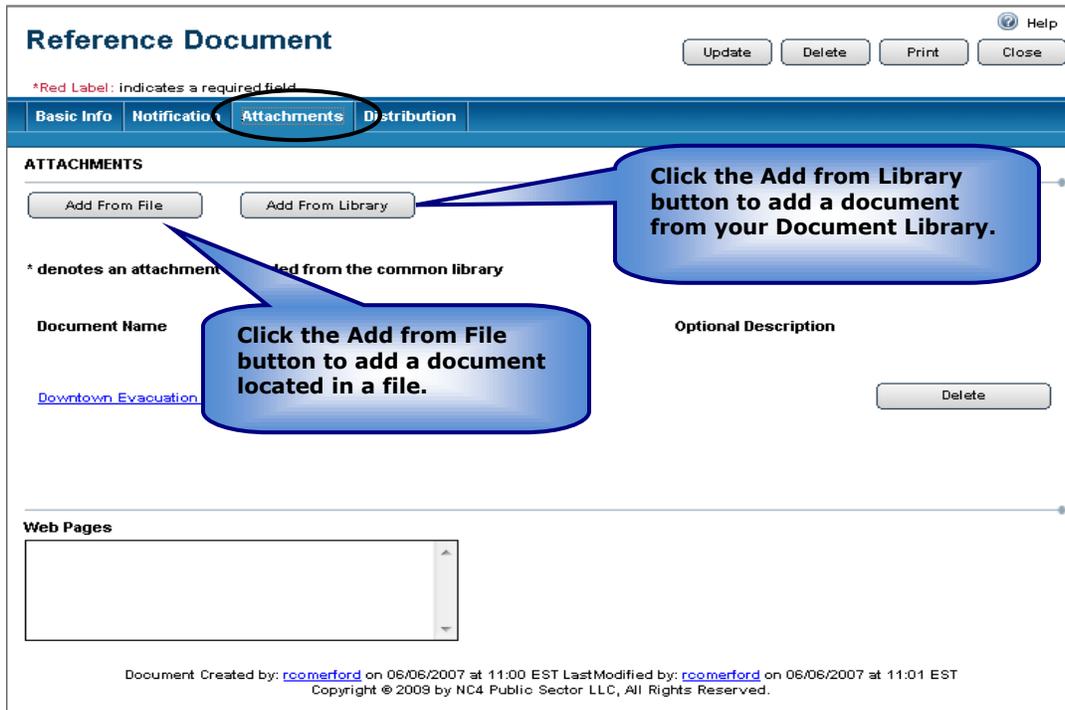


Figure 20 Attachments Tab

This opens a new window as shown in Figure 21.

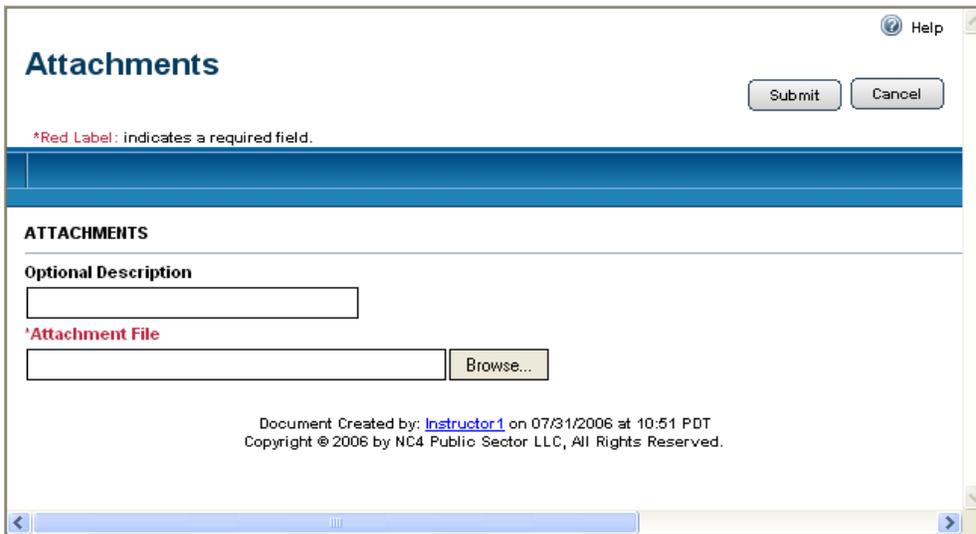


Figure 21 Attachments Window

- 5 Enter information 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 22.

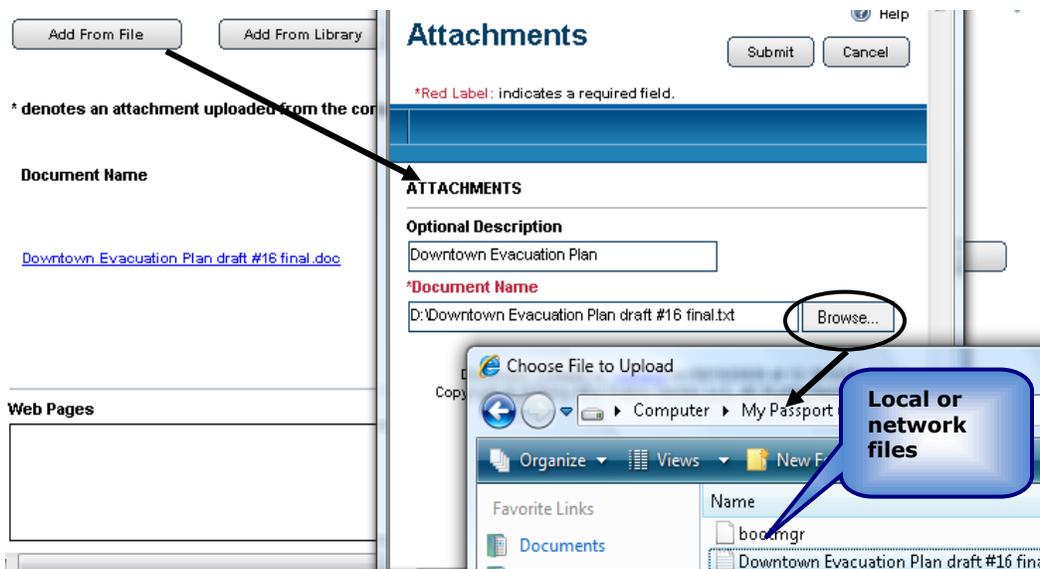
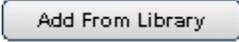


Figure 22 Attaching a File

- 6 After selecting a local or network file, click the  button to save the completed Reference and attachment. The **Attachments** window will immediately close and return you to the Reference Document **Basic Info** tab in *View* mode. Click on the **Attachments** tab to view the document Name link for the Reference.
- 7 To select a document to add to the **Document Library**, click on the  button. This opens the **Document Library** window as shown in Figure 23.

The **Document Library** is discussed in more detail in this module in section 3.9.

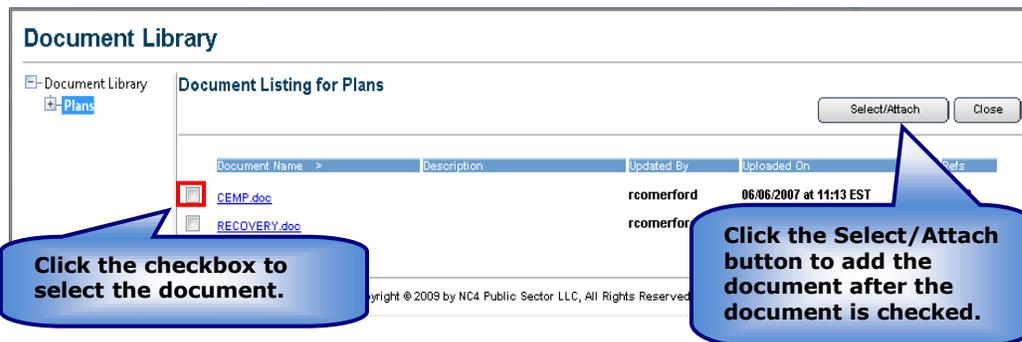


Figure 23 Document Library screen

- 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 23. 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 Name link for the Reference.
- 10 Click the  button that corresponds to the document as shown in Figure 20 to remove any reference documents that have been attached.

3.3.4 Completing a Reference Document-Attachments Document

The **Reference Document** form appears in *View* mode after it has been saved with an attachment. Clicking the **Attachments** tab shown in Figure 24, shows the Name link for the attached file.

Reference Document

*Red Label: indicates a required field.

Basic Info	Notification	Attachments	Distribution
------------	--------------	--------------------	--------------

ATTACHMENTS

Add From File Add From Library

* denotes an attachment uploaded from the common library

Document Name

[Downtown Evacuation Plan draft #16 final.doc](#)

Name link to attached file

Figure 24 Name Link to Attached File

An asterisk (*) preceding the Name link indicates that the file was sourced from the library.

Clicking the Name link in Figure 24 will open the document provided the PC has the required software installed as shown in Figure 25.

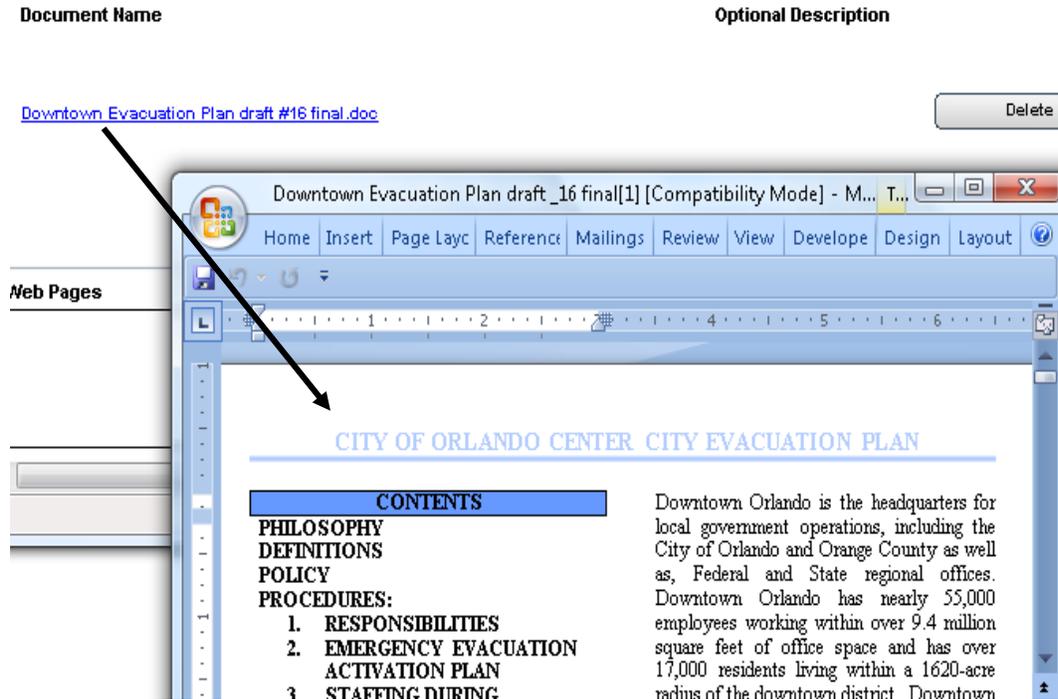


Figure 25 Open an Attachment

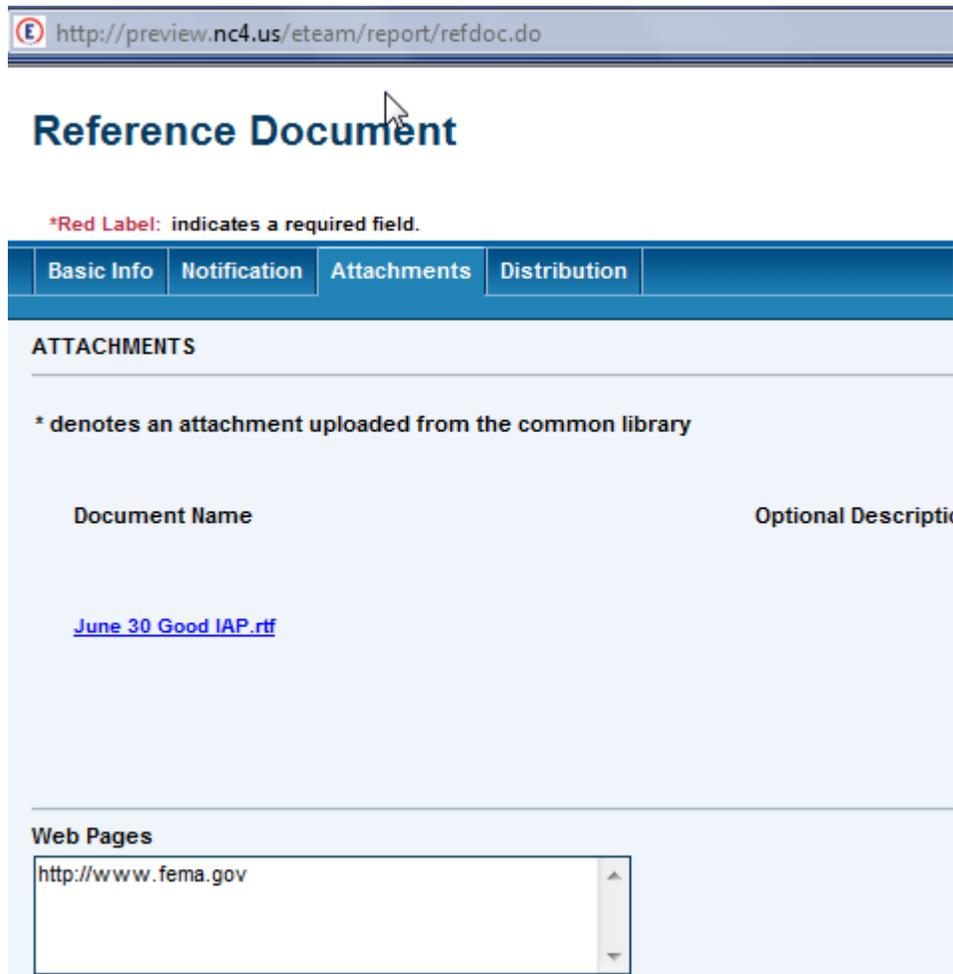
Close the document based on the software used to view the document when you have completed the review of the attached files.

You will see the 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.

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

3.3.5 Completing a Reference Document-Attachment Web Pages

URL addresses can be added within the **Attachments** section using the *Create* or *View/Update* functionality. To add a web page, click the **Update** button, click the **Attachments** tab; proceed to the **Web Pages** field and key in the appropriate URL, as shown in Figure 26.



The screenshot shows a web browser window with the address bar containing the URL: <http://preview.nc4.us/eteam/report/refdoc.do>. The page title is "Reference Document". Below the title, there is a red asterisk followed by the text: "*Red Label: indicates a required field." The page has a navigation bar with four tabs: "Basic Info", "Notification", "Attachments", and "Distribution". The "Attachments" tab is selected. Below the navigation bar, the section is titled "ATTACHMENTS". A note states: "* denotes an attachment uploaded from the common library". There is a table with two columns: "Document Name" and "Optional Description". One entry is visible: "[June 30 Good IAP.rtf](#)". Below the attachments section, there is a "Web Pages" section with a text input field containing the URL "http://www.fema.gov".

Figure 26 Adding a URL in the Web Page field

When you have completed the Reference Document 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.

3.4 Directory

The **Directory** is the central on-line repository or listing of both system users and non-users who have profile information in the NC4 application. This **Directory** provides quick access to profiles, contact info, skill sets and displays who is logged into the system and the length of time they have been using the system.

3.4.1 The Components of the Directory

The **Directory** consists of the following views:

User Name: Lists Profiles of personnel who have system login IDs.

Non-User Name: Lists Profiles of personnel who **DO NOT** have login IDs but have profiles in the system to track contact information, skills and critical functions.

User Organization: Lists system users (those personnel WITH login IDs) by their organization.

Non-User Organization: Lists non-users (those **WITHOUT** login IDs) by their organization.

User Skill Sets: Lists Users (those WITH login IDs) by their skill sets as defined in their Personal Profile.

Non-User Skill Sets: Lists Non-users (those **WITHOUT** login IDs) by their skill sets as defined in their Personal Profile.

All Users & Non-Users: Lists ALL personnel maintained in the system both with and without login IDs.

User Profile History: Lists Users (those WITH login IDs) by their history usage within the application.

Non-User Profile History: Lists Non-users (those **WITHOUT** login IDs) by their history usage within the application.



3.4.2 Viewing the User Names Directory

The **User Names** section of the Directory contains a listing of all Users that have system login IDs. The **User Names Directory** is maintained by the System Administrator and cannot be edited by Users from within the

Directory. System users can edit their own profile by clicking the



button.

 Users can access their Personal Profile for update upon login or by clicking the Profile button in the top tools frame.

To view the User Names Directory:

- 1 Select **Directory** from the **Report** navigation drop down menu, as shown in Figure 27.

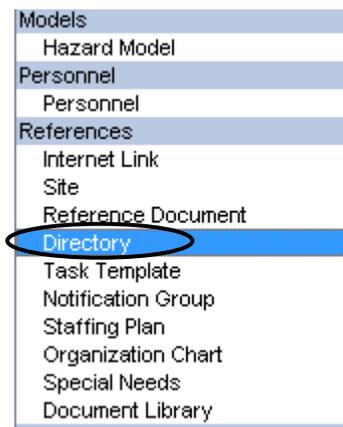


Figure 27 Directory in Report Navigation Menu

The **Directory by User Name** is displayed as shown in Figure 28, sorted alphabetically.

Directory by User Names Expand All Collapse All

Auto Refresh Off On This screen last updated (00:00:00:26)

<input type="checkbox"/>	Name	Location	Position	Online Since
<input type="checkbox"/>	admin_cpog	E Team	E Team Support	Off Line
<input type="checkbox"/>	Admin_NC4	E Team	E Team Support	Off Line
<input type="checkbox"/>	Analyst_Courseware	EOC	Director	Off Line

Figure 28 Directory by User Names

Clicking the triangle icon “▶” next to a letter opens the alphabetical list of **Users** as shown in Figure 28.

Note that the **Directory** list indicates a User’s online status in the **Online Since** column.

Clicking a **User's Name** link will open their **User Personal Profile** as shown in Figure 29.

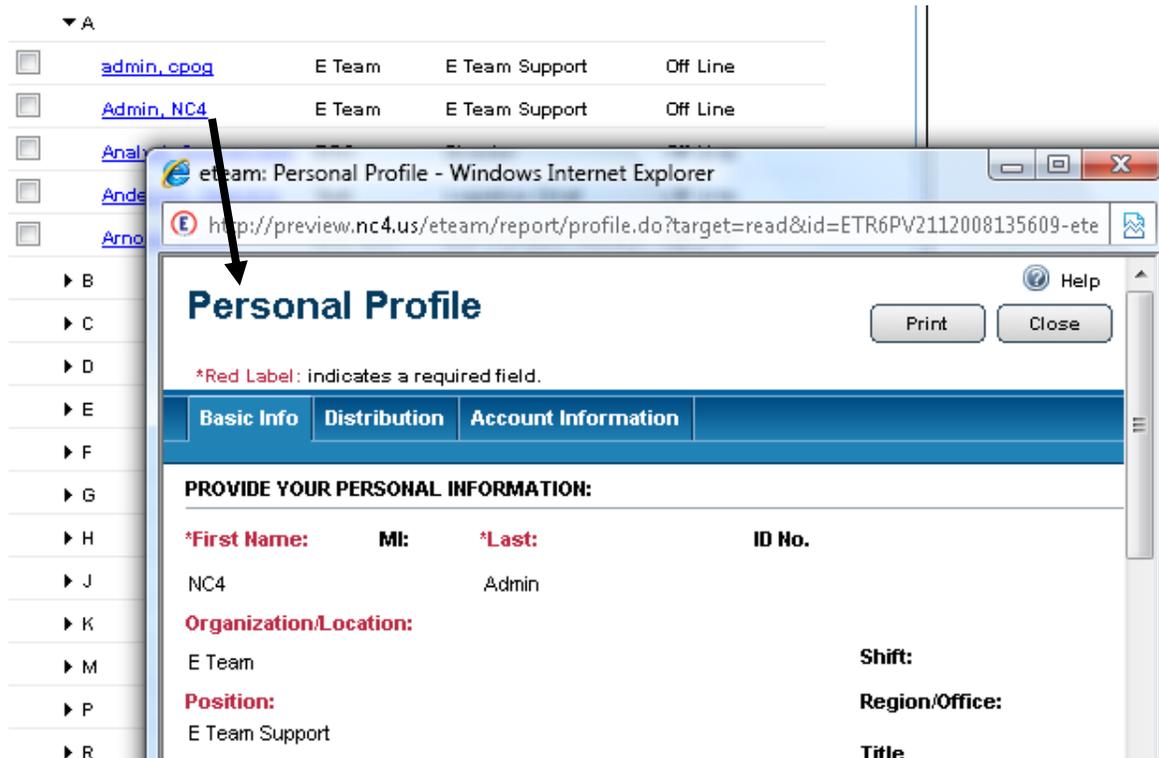


Figure 29 Opening a User Profile from the Directory List

3.4.3 Viewing/Updating the Directory by Non-User Names

The Directory by **Non-User Names** lists personnel that **DO NOT** have system login IDs. You may include personnel in this **Directory** and track their contact information, available skill sets and other profile elements.

To view the Directory by **Non-User Names** in the center view frame:

- 1 Select **Directory** from the **Report** navigation drop down menu.
- 2 Select **Non-User Name** from the **View by** drop down menu to open the **Directory by Non-User Names**, which is sorted alphabetically, as shown in Figure 30.

Report: View by:

Directory by Non-user Names

Auto Refresh Off On This screen last updated (00:00:00:08)

<input type="checkbox"/>	Name	Location	Position
<input type="checkbox"/>	James, John	EOC	GIS

Figure 30 Directory by Non-User Names

Clicking the triangle icon "▾" next to a letter opens the alphabetical list of **Non-users**.

Clicking the **Non-user's Name** link will open the **Non-user's Personal Profile**, as shown in Figure 31.

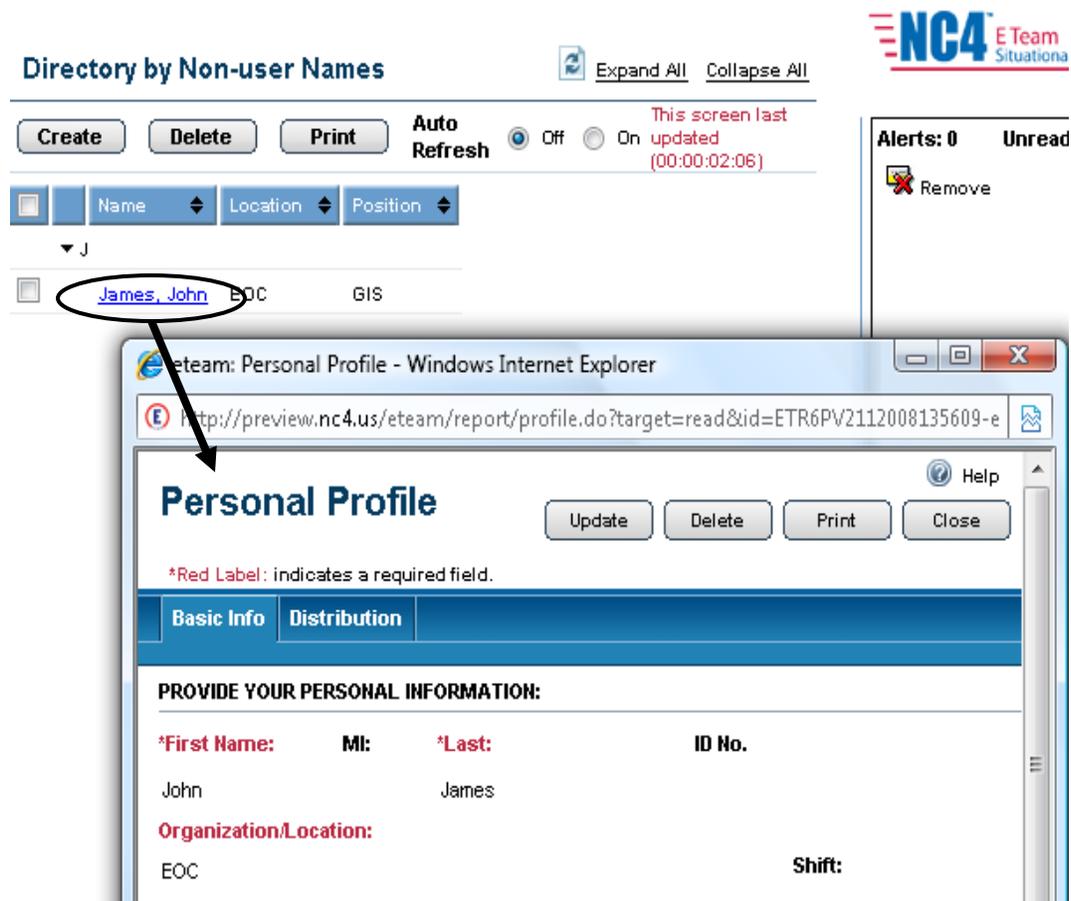
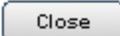


Figure 31 Opening a Non-user's Personal Profile from the Directory List

You will see the     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.

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

Note that you may edit or update a Non-user's Personal Profile from within the Directory. More information about the Personal Profile can be found in the Module: Personal Profile.

3.4.4 Creating/Updating a Non-User Personal Profile

From the **Directory by Non-User Names** summary screen, click the **Create** button to open a new **Personal Profile** form, as shown in Figure 32.

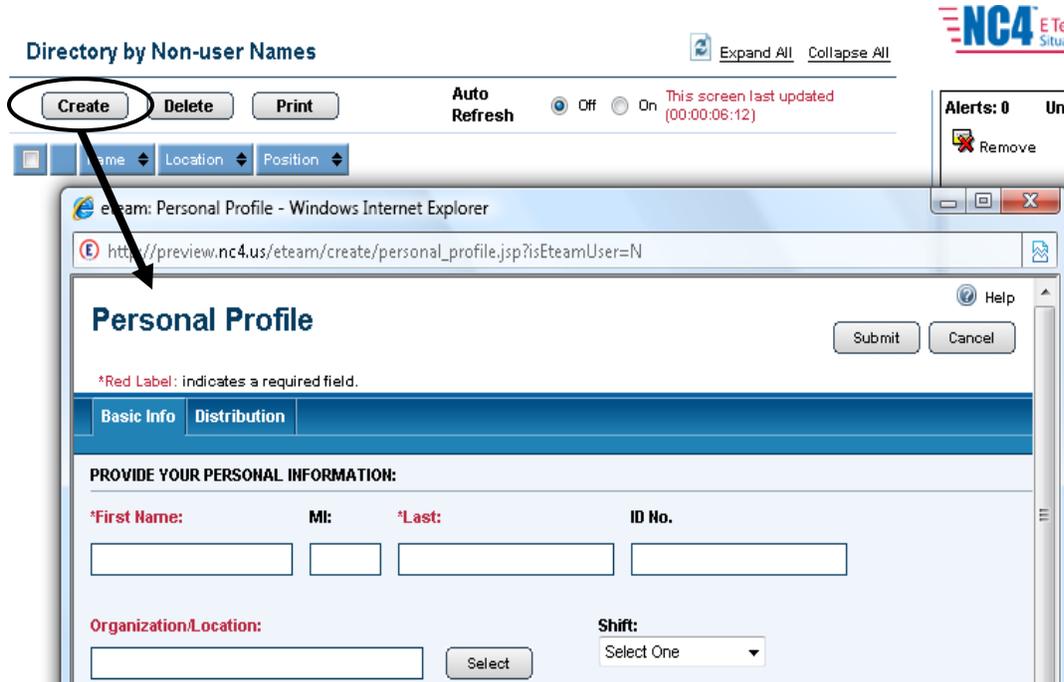


Figure 32 New Personal Profile Report Form

Complete the fields in the Personal Profile for the **Non-User** and click the **Submit** button to save the report. The Non-User Profile is now available in *View* mode.

More information about how to complete a Personal Profile can be found in the Module: Personal Profile.

3.4.5 Directory by User Organization

The Directory by **User Organization** lists Users by their Organization as entered in their Personal Profile.

To view the Directory by User Organization, select **User Organization** from the **View by** drop down menu, as shown in Figure 33.



Figure 33 Directory by User Organization

Click a triangle icon “▶” next to an Organization to display **Users** from that **Organization**, as shown in Figure 33.

Click a **User’s Name** link to open that **User’s Personal Profile** in *View* mode.

The individual User Personal Profiles **cannot** be edited by anyone other than the profile owner and the System Administrator.

3.4.6 Directory by Non-User Organization

The **Directory by Non-User Organization** lists Non-users by their Organization as entered in their Personal Profile.

To view the Directory by **Non-User** Organization, select **Non-User** Organization from the **View by** drop down menu, as shown in Figure 34.

Report: **View by:**

Directory by Non-user Organization [Expand All](#) [Collapse All](#)

Auto Refresh Off On This screen last updated (00:00:00:07)

<input type="checkbox"/>	Organization	Name	Position	Office Phone	Cell Phone
<input type="checkbox"/>	EOC	James, John	GIS	NR	NR

Figure 34 Directory by Non-user Organization

Clicking the triangle icon “▶” next to an **Organization** name opens the alphabetical list of **Non-Users** in that **Organization**, as shown in Figure 34.

Clicking the **Non-User's Name** link will open the **Non-User's Personal Profile**, as shown in Figure 35.

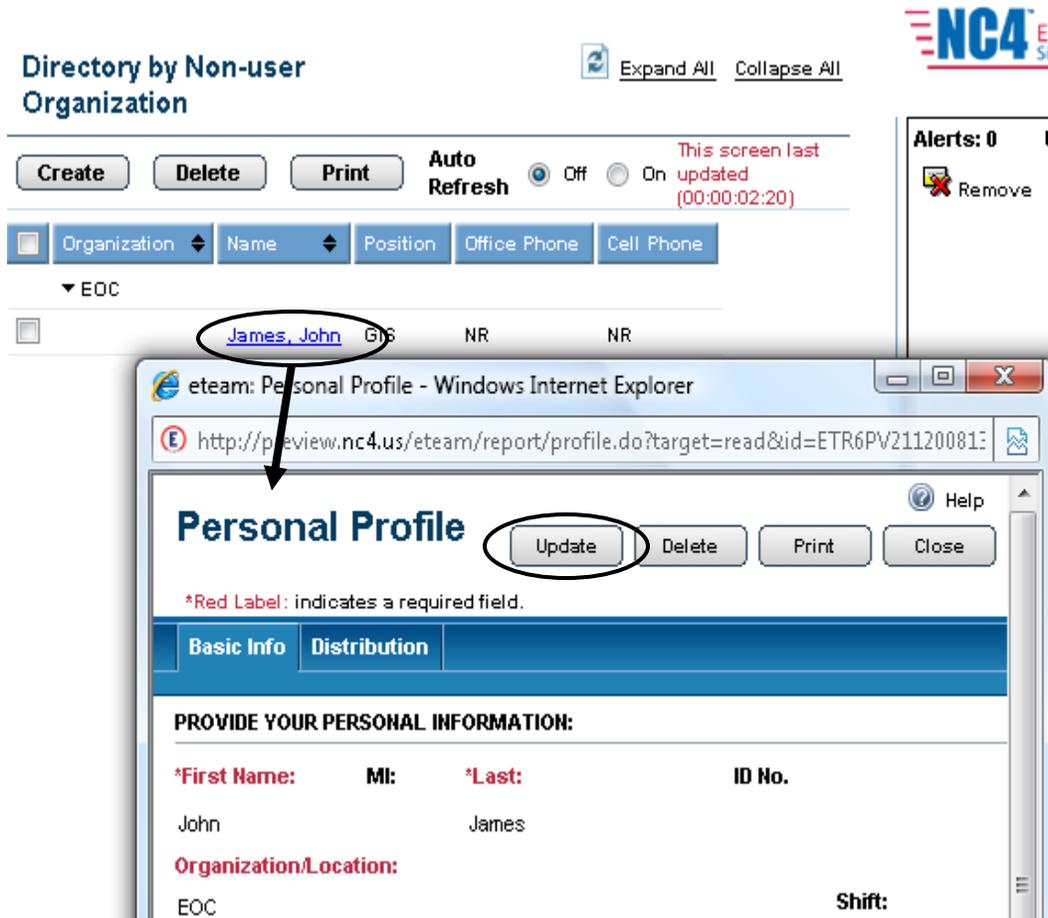


Figure 35 Opening a Non-user's Personal Profile from the Directory

Clicking the **Update** button will open the **Non-user Personal Profile** for updating and editing, as shown in Figure 35.

More information about creating/updating Personal Profiles can be found in the Module: Personal Profile.

3.4.7 Directory by User Skill Sets

The **Directory by User Skill Sets** lists system users by the skill sets identified in their **Personal Profile**. This is used frequently when searching for specific personnel skills such as language skills (translators), medics and other critical skills.

To view the **Directory by User Skill Sets**, select **User Skill Sets** from the **View by** drop down menu as shown in Figure 36.

Report: **View by:**

Directory by User Skill Sets [Expand All](#) [Collapse All](#)

Auto Refresh Off On This screen last updated (00:00:00:09)

<input type="checkbox"/>	Skill Sets	Name	Organization	Position	Office Phone	Cell Phone	Online Since
	▶ Not Reported						
	▶ CEM						
	▶ CPR						
	▶ French Speaking						
<input checked="" type="checkbox"/>	HazMat Specialist	Developer, Content	EOC	Director	123-456-7890	123-456-7891	Off Line

Figure 36 Directory by User Skill Sets

Clicking the triangle icon “▶” next to a **Skill Set** opens the alphabetical list of **Users** with that skill in their Personal Profile, as shown in Figure 36.

Clicking a **User’s Name** link will open that User’s Personal Profile in *View* mode.

3.4.8 Directory by Non-User Skill Sets

The **Directory by Non-user Skill Sets** lists non-users by the skill sets identified in their **Personal Profile**. This is used frequently when searching for specific personnel skills such as language skills (translators), medics and other critical skills.

To view the **Directory by Non-user Skill Sets**, select **Non-User Skill Sets** from the **View by** drop down menu, as shown in Figure 37.

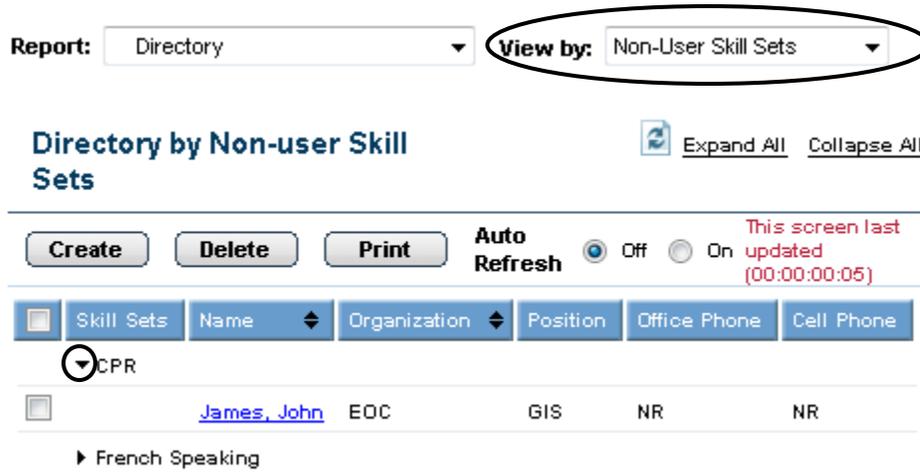


Figure 37 Directory by Non-user Skill Sets

Clicking the triangle icon “▶” next to a **Skill Set** opens the alphabetical list of **Non-Users** with that skill in their Personal Profile, as shown in Figure 37.

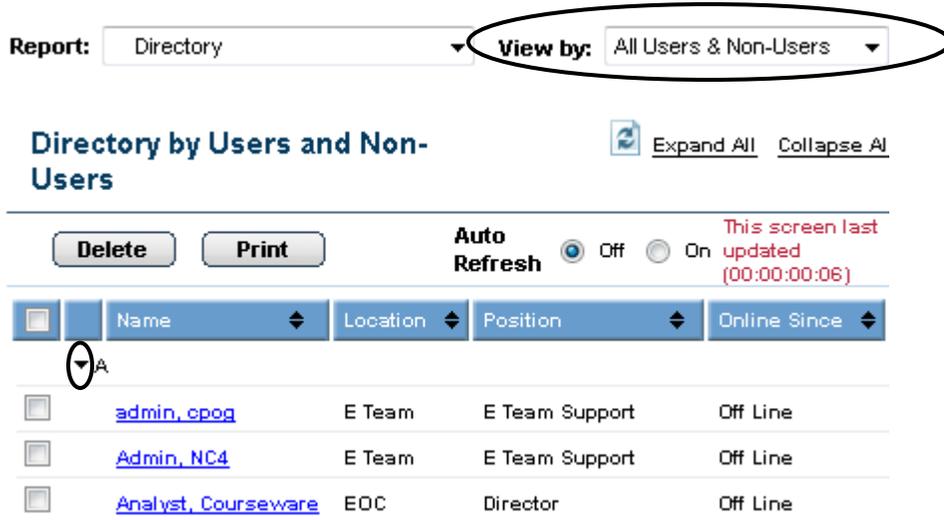
Clicking a **Non-User’s Name** link will open that Personal Profile in *View* mode.

Note that **Non-User Personal Profiles** can be Updated or Created within the Directory.

3.4.9 Directory by Users and Non Users

The **Directory by Users and Non-Users** is a full alphabetic list of all Personal Profile entries in the NC4 application. As with the specific Directory components in this module, only **Non-User** profiles are accessible for Edit/Update.

To view the **Directory by Users and Non-Users**, select **All Users & Non-Users** from the **View by** drop down menu, as shown in Figure 38.



Only Non-Users Personal Profiles are accessible for Edit/Update from within the Directory.

Figure 38 Directory by Users and Non-Users

Clicking the triangle icon "▾" next to a letter opens the alphabetical list of **All Users** in the system, as shown in Figure 38.

Clicking a Name link will open that Personal Profile. The **Directory by Users and Non-Users** provides the ability to view and examine all Users and Non-Users in the system.

Only the Personal Profile owner or System Administrator can update a Personal Profile with an associated system login.

3.4.10 User Profile History

The **User Profile History** report form displays the user activity within the application. To view the **User Profile History** report form, select **User Profile History** in from the **View by** drop down menu, as shown in Figure 39.

Report: **View by:**

User Profile History [Expand All](#) [Collapse All](#)

Auto Refresh Off On This screen last updated (00:00:00:11)

<input type="checkbox"/>	Login ID	Logged in As	Agency/Location	Updated At	Updated By
	▶ aarnold				
	▶ abullen				
	▼ admin				
<input type="checkbox"/>	eTEAM,Admin	EOC		02/11/2008 at 17:40 EST	eTEAM, Admin
<input type="checkbox"/>	eTEAM,Admin	EOC		02/11/2008 at 17:40 EST	eTEAM, Admin

Figure 39 User Profile History

Clicking the triangle icon “▶” next to a letter opens the **History** list in the summary screen.

3.4.11 Non-User Profile History

To view **Non-User Profile History**, select **Non-User Profile History** from the **View by** drop down menu, as shown in Figure 40.

Report: **View by:**

Non-User Profile History Expand All Collapse All

Auto Refresh Off On This screen last updated (00:00:00:45)

<input type="checkbox"/>	Non E Team User	Agency/Location	Updated At	Updated By	Deleted At	Deleted By
	▶ ,					
	James, John					
<input type="checkbox"/>	EOC		09/22/2009 at 17:27 EST	content		
<input type="checkbox"/>	EOC		09/22/2009 at 17:16 EST	content		

Figure 40 Non-User Profile History

Clicking the triangle icon "▶" next to a letter opens the history list in the summary screen.

3.5 Notification Group

The NC4 application allows the creation of groups of email addresses for notifications. The groups created can be accessed in the **Notification** section of a report.

3.5.1 Creating a Notification Group

To create a new **Notification Group**, perform the following steps:

- 1 Select **Notification Group** from the **Report** navigation drop down menu, as shown in Figure 41.

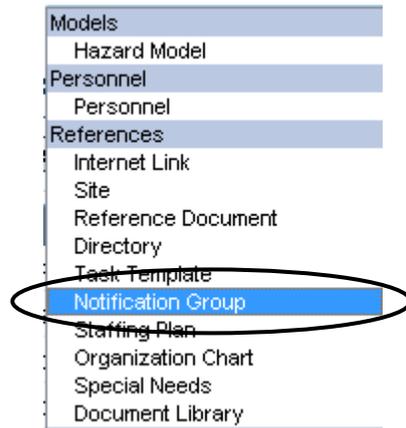


Figure 41 Notification Group in Report Navigation Drop Down Menu

- 2 Click the  button on the **Notification Groups** summary screen.

This opens the new **Notification Group** form as shown in Figure 42.

- 3 Key in the **Group Name** and a **Description**. **Group Name** is a required field.

Notification Group Help

Submit Cancel

*Red Label: indicates a required field.

Basic Info **Distribution**

Group Name
Full EOC Activation

Description
For full EOC activation

ENTER EMAIL ADDRESSES OF GROUP MEMBERS
Click **SELECT** to add group members from E Team profiles.

Add email addresses of additional group members by typing directly in the field below. To include a URL link to the appropriate document include an "(E)" in front of the users email address e.g. "(E)JSmith@abcd.com".

Note: Please separate the multiple values by new line, or blank line.

xxxx@xxx.com Select

Document Created by: rcomerford on 05/18/2007 at 23:56 EST LastModified by: rcomerford on 05/18/2007 at 23:56 EST
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Distribution is covered in Module: Common Functions

***Red Label** indicates a required field.

Figure 42 Notification Group Form

- Clicking the **Select** button will open a notification name dialog box, shown in Figure 43. To enter the email addresses of an individual on the list, enable the checkbox. Then click the **OK** button.

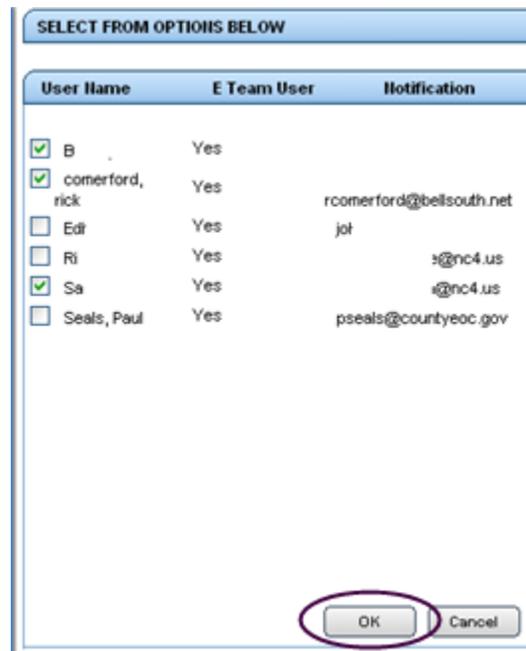


Figure 43 Email Name Dialog Box

You may also key in email addresses of those you want to include in the notification group. Note that each email address must be separated by a blank line.

- Click the  button to save this **Notification Group**. The **Notification Group** is now open in *View Mode*.

You will see the     buttons in the upper right of the Notification Group 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.

3.5.2 Using Notification Groups in Reports

The new **Notification Group** is now available in any report for **Notification** purposes as shown in Figure 44.

Medical Incident Report Help

Submit Cancel

*Red Label: indicates a required field.

Basic Info **Notification** **Geo-Location** **Attachments & Overlays** **Distribution & Sharing**

NOTIFICATION

Send Notification? Yes No

Message (max. 140 characters for mobile users)

Select Recipients Individuals Groups

(click a link to add to the notification list)

Email Group Name	Notification List
EOC Level 2 Activation	(click a link to remove a user from the notification list)
Executive Policy Group	[group] Full EOC Activation

Click **Groups** to display Notification Groups in the system

Click a Notification Group **Name** link to add it to the Notification List

Figure 44 Selecting an Email Group

Notification is covered in detail in the Module: Common Functions.

The list of the names in the group is not displayed in the **Notification List** field in the reports.

3.6 Staffing Plan

Use the Staffing Plan to assign staff to positions within your operations center, command post, or organization for a given day and shift. Staff scheduling allows you to create, store and modify personnel schedules.

3.6.1 Creating a Staffing Plan Reference

To create a new **Staffing Plan** Reference, perform the following steps:

- 1 Select **Staffing Plan** from the **Report** navigation drop down menu, as shown in Figure 45.

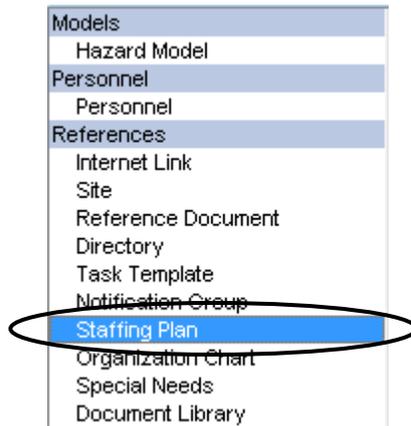


Figure 45 Staffing Plan in Report Navigation Drop Down Menu

- Click the **Create** button on the **Staffing Plan** summary screen, as shown in Figure 46.

Figure 46 Staffing Plan Summary Screen

The **Staff Scheduling** form displays as shown in Figure 47.

- Click the **Set** button to select the date for the schedule; select an **Organization** by clicking a radio button; and select the **Shift** from the drop down menu as shown. Both the **Date** and **Shift** are required fields.

*Red Label indicates a required field.

Figure 47 Staff Scheduling Form

- Click the **Submit** button to save this information before you define the **Staff Schedule**. This **Staffing Reference** form must be created, submitted, and available in *View* mode before you can assign a person to a Position.



3.6.1.1 UPDATING AND ADDING POSITIONS

- 1 Open the **Staffing Plan** as shown in Figure 48.
- 2 Click the position to be assigned.

It may be necessary to expand several levels depending on how the organization is structured.

Report: View by:

Staffing Plans by Date Expand All Collapse All

Auto Refresh Off On
 This screen last updated (00:00:05:00)

Date	Organization	Shift	Position/Assigned To
▼ 07/25/2009	▼ EOC	▼ Third 2300-0700	▼ EOC
			Director [NOT ASSIGNED]
			▶ Logistics [TestTest]
			▶ Operations [NOT ASSIGNED]
			▶ Plans and Intel [NOT ASSIGNED]
▶ 06/06/2007			

Note: Callouts in the image point to 'Expand Organization levels' and 'Position Name link'.

Figure 48 Staffing Plan Levels

- 3 Click the **Position Name** link to open the **Staffing** description form in *View* mode.
- 4 Click the button to update the **Staffing** information for this position.

Note the **Schedule Information** is automatically populated by the system, as shown in Figure 49 .

- 5 Click the button to open a new window that lists all system users.



- Click the Name link of the individual to assign him or her to that position.

The **Staff Scheduling** form will be auto-filled based on the individual's **Personal Profile** as shown in Figure 49.

Notification is covered in the Module: Common Functions.

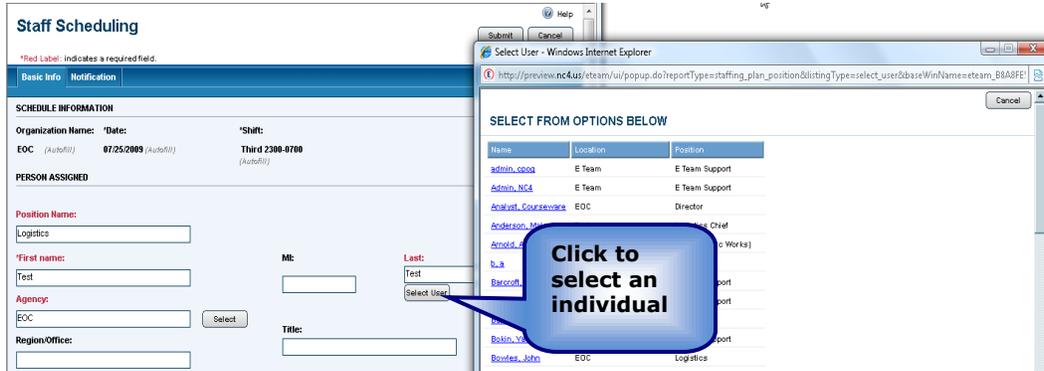
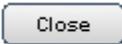


Figure 49 Assigning an Individual to a Scheduled Position

3.6.2 Completing a Staffing Plan

Click the  button on the complete **Staff Scheduling** form to save the information.

You will see the     buttons in the upper right of the Staff Scheduling 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.

You will be able to view the newly added individual when the **Staff Schedule** is expanded to view the **Positions**, as shown in Figure 50.

Report: View by:

Staffing Plans by Date  [Expand All](#) [Collapse All](#)

Auto Refresh Off On This screen last updated (00:00:13:35)

<input type="checkbox"/>	Date	Organization	Shift	Position/Assigned To
	▼ 07/25/2009			
		▼ EOC		
			▼ Third 2300-0700	
<input type="checkbox"/>				▼ EOC
<input type="checkbox"/>				Director ASSIGNED
<input type="checkbox"/>				▶ Logistics [TestTest]

Figure 50 Completed Staffing Plan Entry

3.7 Organization Chart

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 Reference section become available for use in the Personal Profile section; they are added to the Select Position dialog box list. In addition, the **Organizations** and **Positions** added here determine the **Position Based Menu** assigned to individual users in the system. More information about **Position Based Menus** can be found in the Module: Report Views.

3.7.1 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 51.

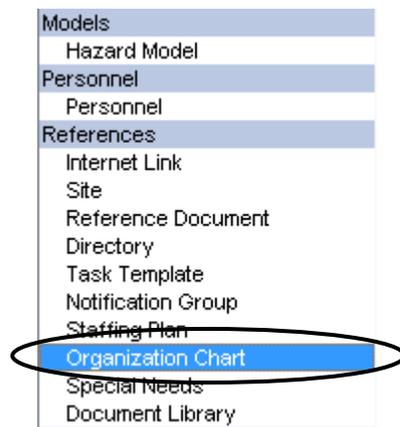


Figure 51 Organization Chart in Report Navigation Drop Down Menu

The **Organization Chart** summary screen opens as shown in Figure 52.

- 2 Click the **Create** button to create a new **Organization Chart**.

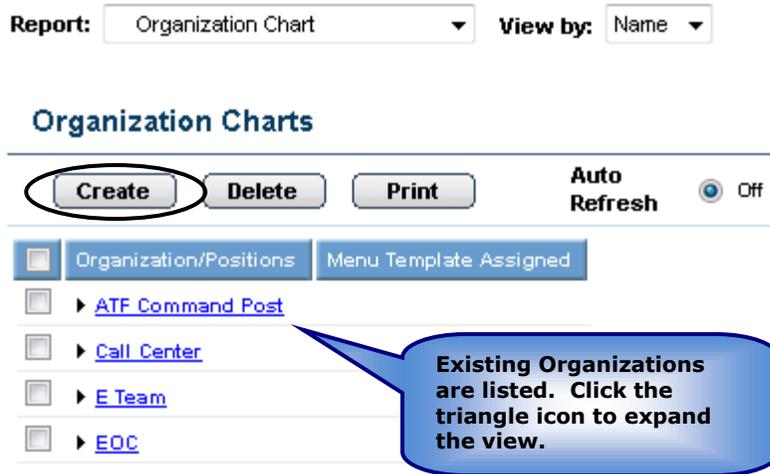
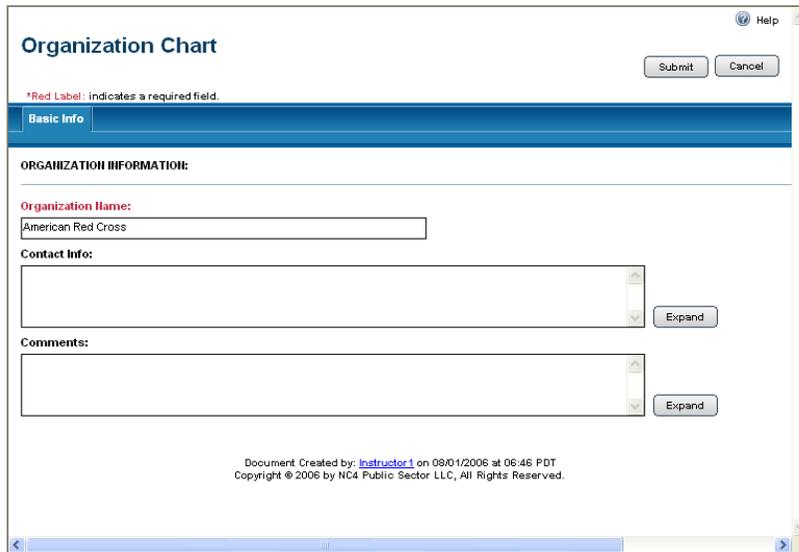


Figure 52 Organization Chart Summary Screen

- 3 In the **Organization Information** section of the new **Organization Chart** form, key in a name for the **Organization** and any appropriate **Contact Info** or **Comments** as shown in Figure 53.



 The Organization name must be available in *View* mode before you can create an Organization Chart.

Figure 53 Organization Information

- 4 Click the  button to save the organization information.

The **Organization Information** screen now opens in *View* mode.

You will see the     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.

3.7.2 Adding a Position to an Organization

When an **Organization** has been created and saved, positions can be added to that organization.

- 1 Click on or expand an existing **Organization Name** link as shown in Figure 54.

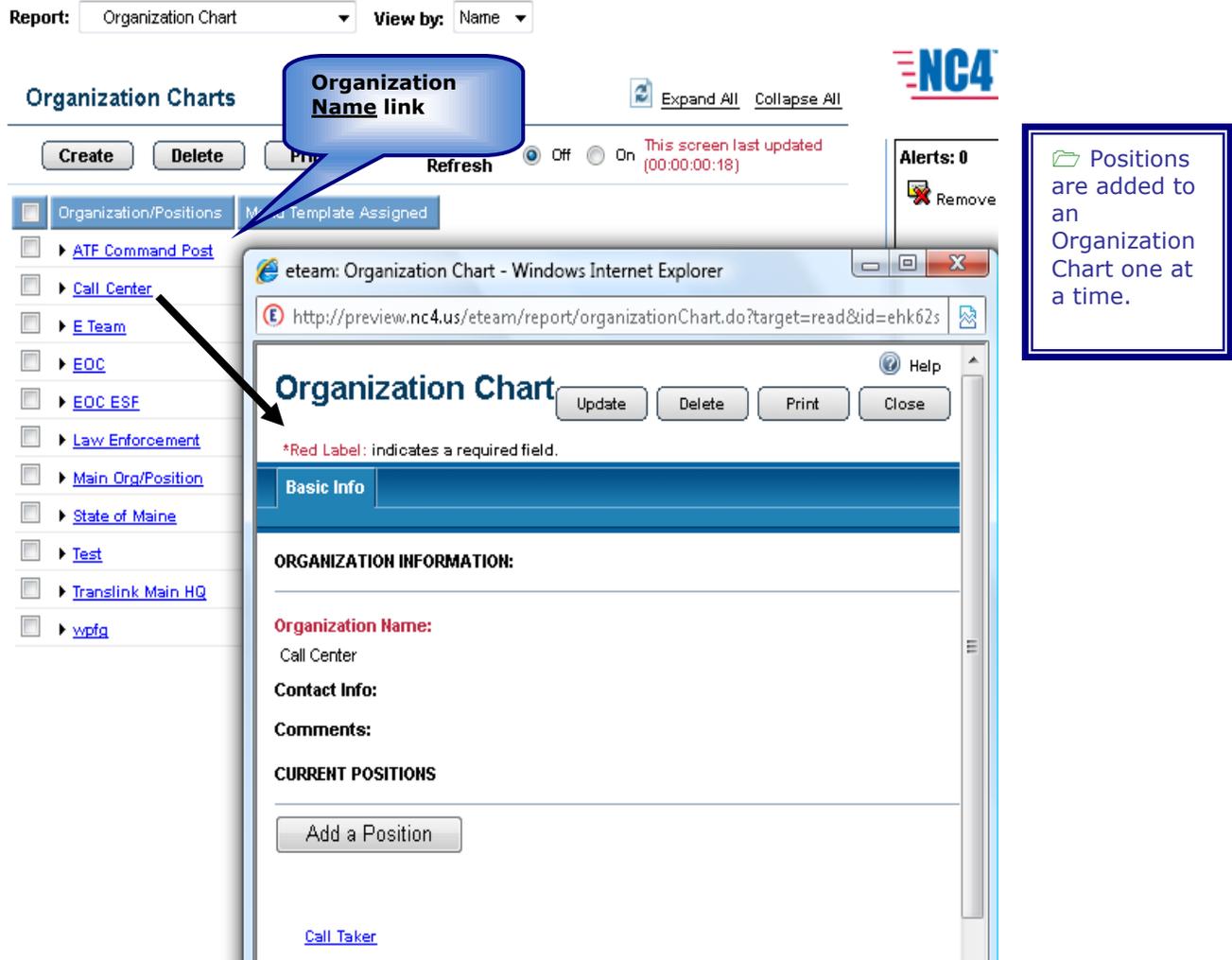
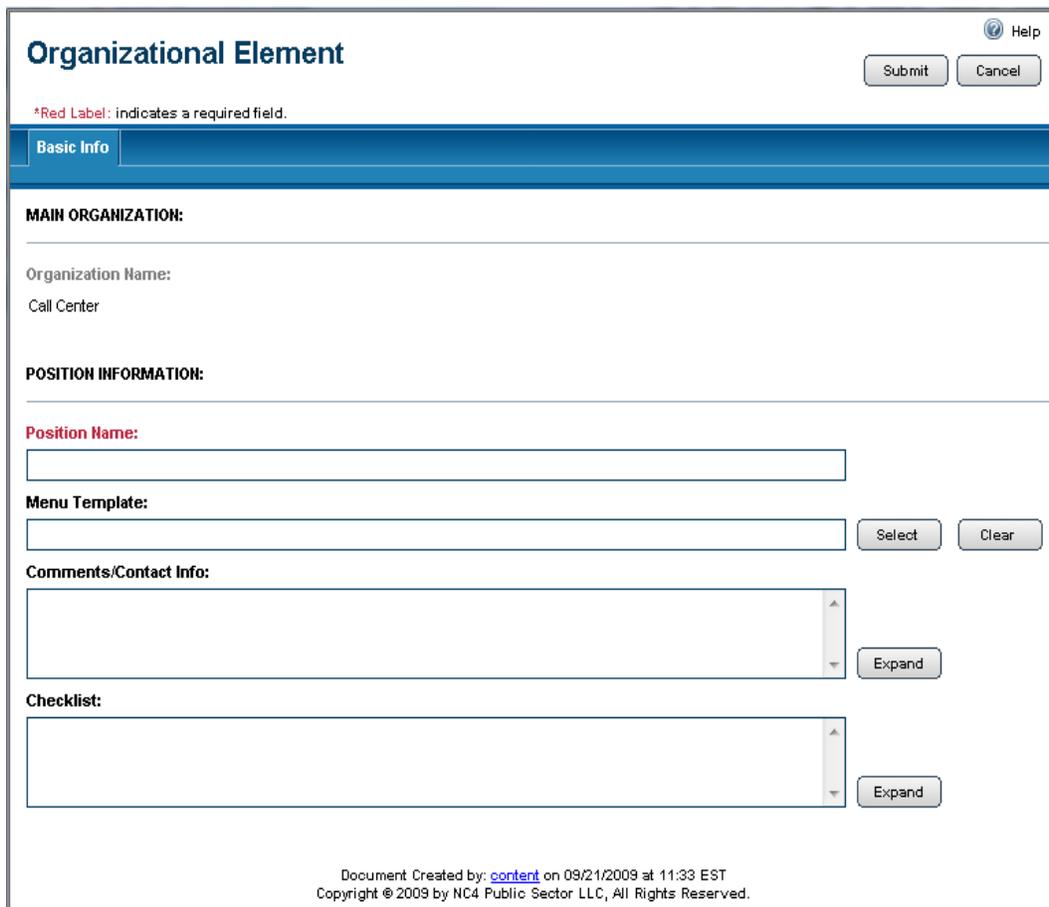


Figure 54 Open an Existing Organization

- 2 Click the  button to open the **Organizational Element** window as shown in Figure 55.



Organizational Element Help Submit Cancel

*Red Label: indicates a required field.

Basic Info

MAIN ORGANIZATION:

Organization Name:
Call Center

POSITION INFORMATION:

Position Name:

Menu Template:
 Select Clear

Comments/Contact Info:
 Expand

Checklist:
 Expand

Document Created by: [content](#) on 09/21/2009 at 11:33 EST
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Figure 55 Organizational Element Window

- 3 Key in a **Position Name** in the required field.

- 4 Select a **Position Menu Template** by clicking the  button as shown in Figure 56.

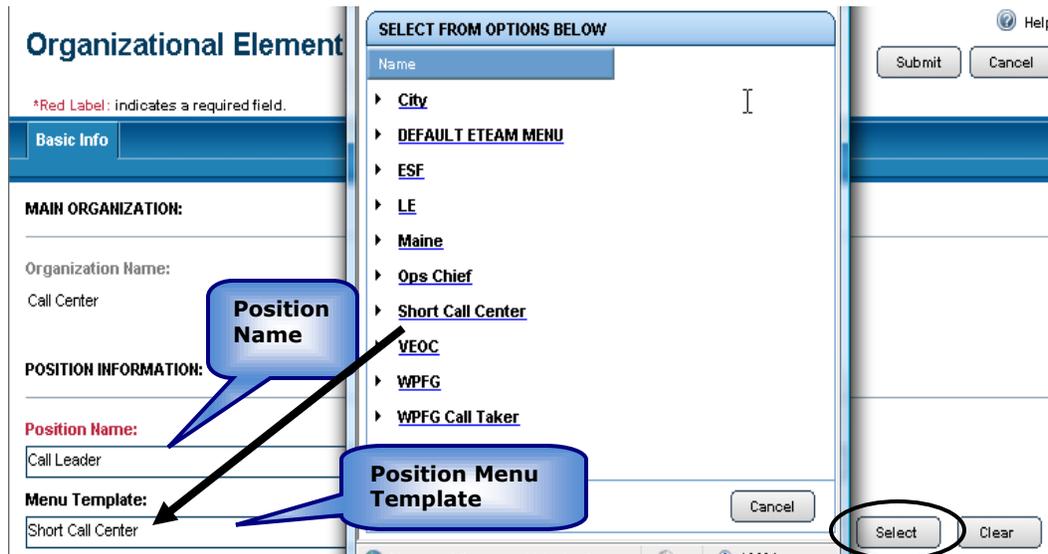


Figure 56 Position Name and Template

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

- 5 Key in any appropriate **Comments/Contact Info** and **Check List** duties for the position as shown in Figure 57.

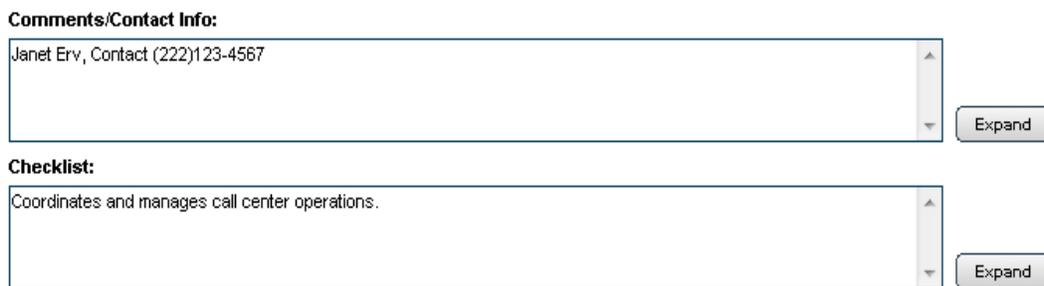
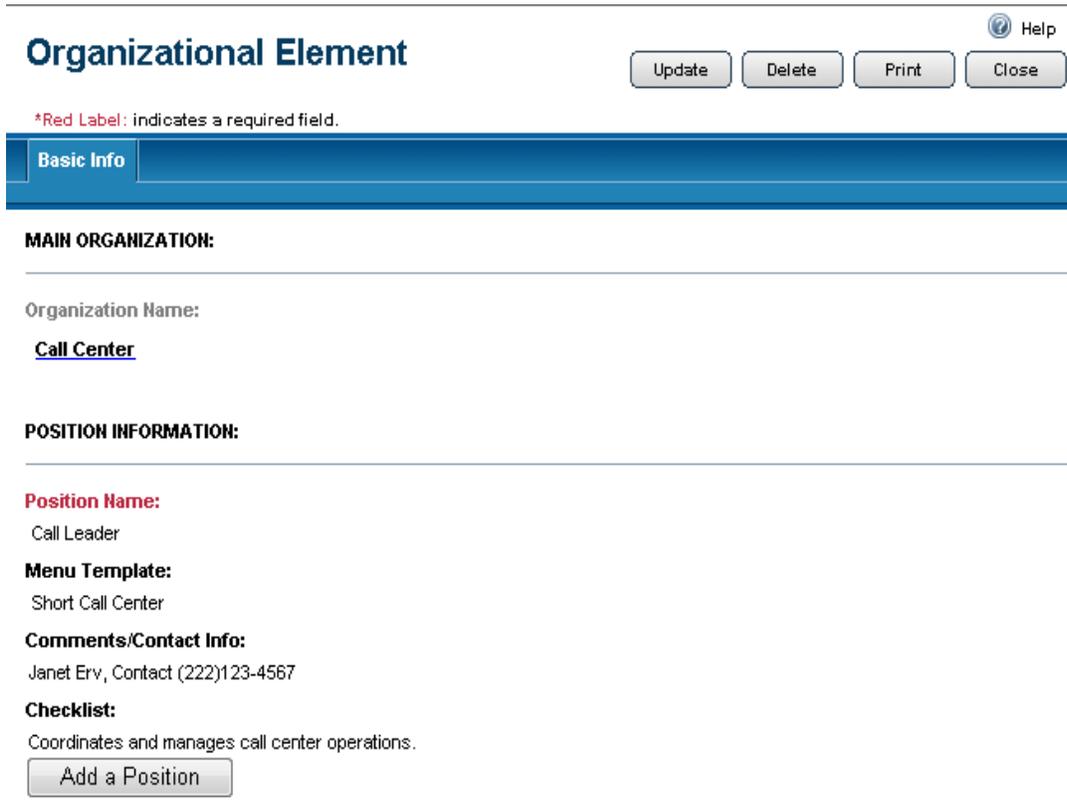


Figure 57 Contact Info and Check List Fields

The information entered in the **Checklist** field will populate the **Duties Checklist** that users may see when they access the NC4 application or click the **Checklist** button in the Top Tools Frame.

- Click the  button to save the information for this position.

The **Organizational Element** opens in *View* mode as shown in Figure 58.



Organizational Element Help

Update Delete Print Close

*Red Label: indicates a required field.

Basic Info

MAIN ORGANIZATION:

Organization Name:
Call Center

POSITION INFORMATION:

Position Name:
Call Leader

Menu Template:
Short Call Center

Comments/Contact Info:
Janet Erv, Contact (222)123-4567

Checklist:
Coordinates and manages call center operations.

Add a Position

Figure 58 Complete Organizational Element in View Mode

You will see the     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.

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



- Click the  button on the completed **Organizational Element** form to add a subordinate position to the **Organization Element**.

3.7.3 Completed Organization Chart

A complete **Organization Chart** may resemble the example shown in Figure 59.

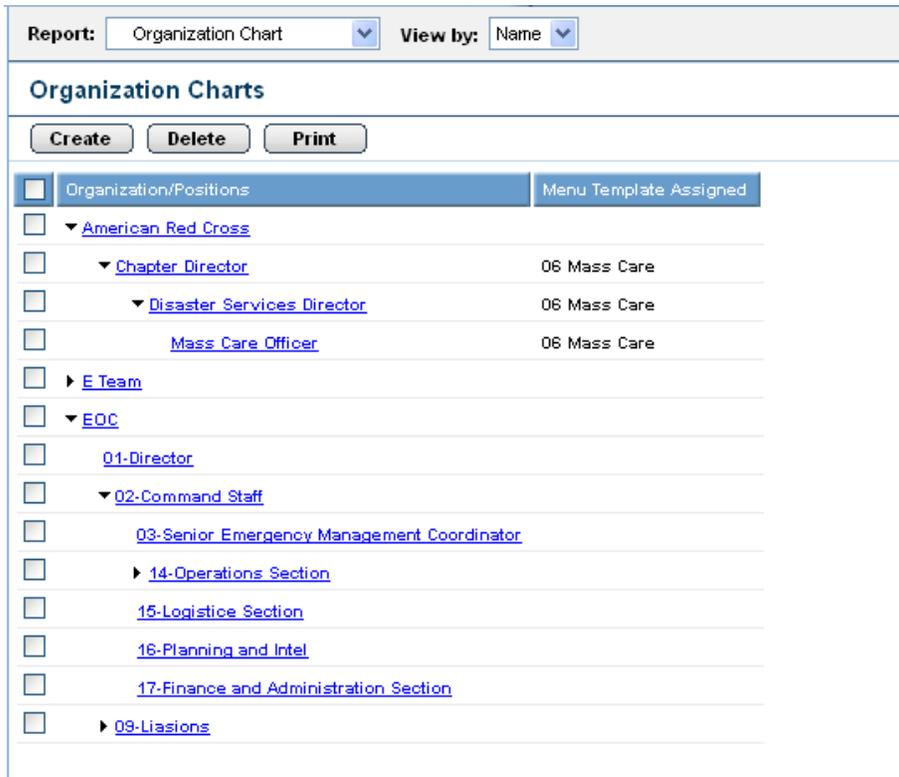


Figure 59 Completed Organization Chart

Organization Charts can be created and updated at any time.

3.8 Special Needs

The Special Needs form provides a listing of individuals with their contact information who have special care needs within the community. The system also provides the ability to map an individual's location or provide alerts regarding the individual in times of emergency.

It captures age, location, medical conditions and special needs information that is then readily available at the time it is most needed.

Use the **Special Needs** report form to document the specific needs of individuals who require special care in times of emergency.

3.8.1 Creating a Special Needs Reference

To create a new **Special Needs** reference, perform the following steps:

- 1 Select **Special Needs** from the **Report** navigation drop down menu as shown in Figure 60.

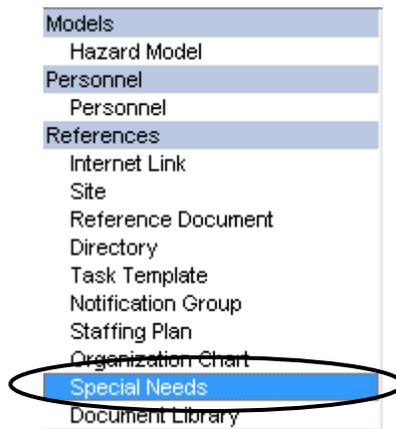


Figure 60 Special Needs in Report Navigation Drop Down Menu

The **Special Needs** summary screen opens as shown in Figure 61.

- 2 Click the  button to create a new **Special Needs** reference.



Figure 61 Special Needs Summary Screen

- 3 The new **Special Needs** form will open as shown in Figure 62.



[Help](#)

Special Needs

***Red Label:** indicates a required field.

Basic Info	Additional Info	Notification	Geo-Location	Attachments & Overlays	Distribution & Sharing
------------	-----------------	--------------	--------------	------------------------	------------------------

Last Name **Middle Initial** **First Name**

Gender Male Female **Date of Birth** [Set](#) [Clear](#) **Age**

Telephone

Mobile Home Park Name [Search/Add](#) **Community/ Subdivision Name**

Home Type Mobile/Manufactured Single Family Apt/Condo RV **Apartment Floor** [Search/Add](#)

Do You Live Alone **Mailing Address Same as Home**

Mailing Address 1 **Mailing Address 2**

Mailing City **Mailing State** **Mailing Zip**

Shelter Requirements Staying Home Regular Shelter Special Needs Shelter Staying with Family/Friends

Transportation Requirements No Transportation Required To shelter To Family Friends To Nursing Home To Hospital

Impairment Deaf Hearing Blind Visually

Emergency Contact Telephone **Emergency Contact Name**

Primary Doctors Name **Relationship To You**

Do you receive care in home through a Public/Private Agency? Community Assistance Home Health Hospice

Agency Name [Search/Add](#) **Primary Doctors Telephone**

Agency Telephone

Document Created by: [content](#) on 09/21/2009 at 11:56 EST
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***Red Label** indicates a required field.

Figure 62 Special Needs Report Form



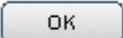
3.8.1.1 SPECIAL NEEDS FIELDS

The **Special Needs** form contains the following fields on the **Basic Info** tab:

- Name (Fields: Last Name, Middle Initial, First Name)
- Gender
- Date of Birth
- Telephone
- Residence (Fields: Mobile Home Park Name, Community/Subdivision Name, Home Type, Apartment Floor)
- Do You Live Alone
- Mailing Address (Fields: Mailing Address Same as Home, Mailing Address 1, Mailing Address 2, Mailing City, Mailing State, Mailing Zip)
- Shelter Requirements
- Transportation Requirements
- Impairment
- Emergency Contact Information (Fields: Emergency Contact Name, Emergency Contact Telephone, Relationship To You)
- Primary Doctor Information (Fields: Primary Doctors Name, Primary Doctors Telephone)
- Do you receive care in home through a Public/Private Agency?

Agency Information (Fields: Agency Name, Agency Telephone)

Last Name and **First Name** are required fields. Most fields on the form allow you to key in the appropriate detail as requested or provide options through the use of radio buttons. Click the radio button for the most appropriate choice for these fields.

Click on the Set link for the **Date of Birth** field to open a form to select the date and time from a calendar using the  button and click the  button when complete.



Click on the [Search/Add](#) link or use the drop down menus to select from the menu for the **Mobile Home Park Name, Apartment Floor, and Agency Name** fields. Drop down menus are also provided for **Mailing State and Relationship To You** fields.

The **Additional Info** tab provides fields for more specific care issues. Key the appropriate response into each field as needed.

3.8.2 Completing a Special Needs Reference

As indicated in Figure 63, complete the other data sections in the Notification, Geo-Location, Attachments & Overlays and Distribution & Sharing tabs, if appropriate. They are covered in the Module: Common Functions.

Click the  button to save the **Special Needs Reference** report then click the **Close** button in *View* mode to return to the **Special Needs** summary screen.



Figure 63 Completing a Special Needs Reference

You will see the     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.

3.9 Document Library

Document Library feature allows the user to post documents that can be shared. The document library folder structure is configured in the **Data Dictionary Keyword Category**.

3.9.1 Viewing the Document Library

Document Library reference documents are viewed in the summary screen after selecting **Document Library** from the **Report** navigation drop down menu, as shown in Figure 64.

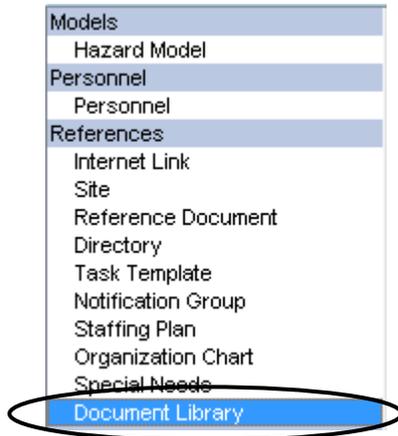


Figure 64 Locating Document Library

The **Document Library** summary screen opens as shown in Figure 65 where the documents are sorted alphabetically.

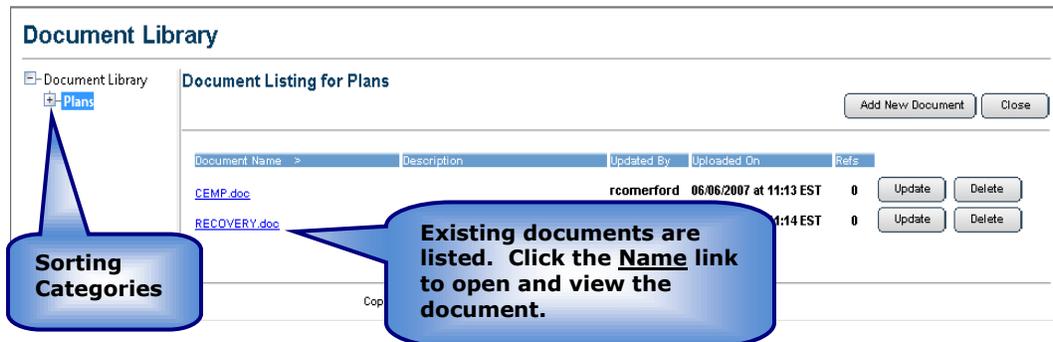


Figure 65 Document Library Summary Screen

Documents can be viewed by category using the folders in the left navigation frame. Click the + symbol to open the folder, then the category Name, to view documents enveloped in the folder sorting utility as shown in Figure 66. Click the category **Name** in order to view the documents for that category.



Figure 66 Sorting Documents by Category

3.9.2 Building the Document Library

To add a new document to the **Document Library**, perform the following steps:

- 1 Select **Document Library** from the **Report** drop down menu.
- 1.1 Click the **Add New Document** button shown in Figure 66 to open the **Upload/Update Document** screen shown in Figure 67.

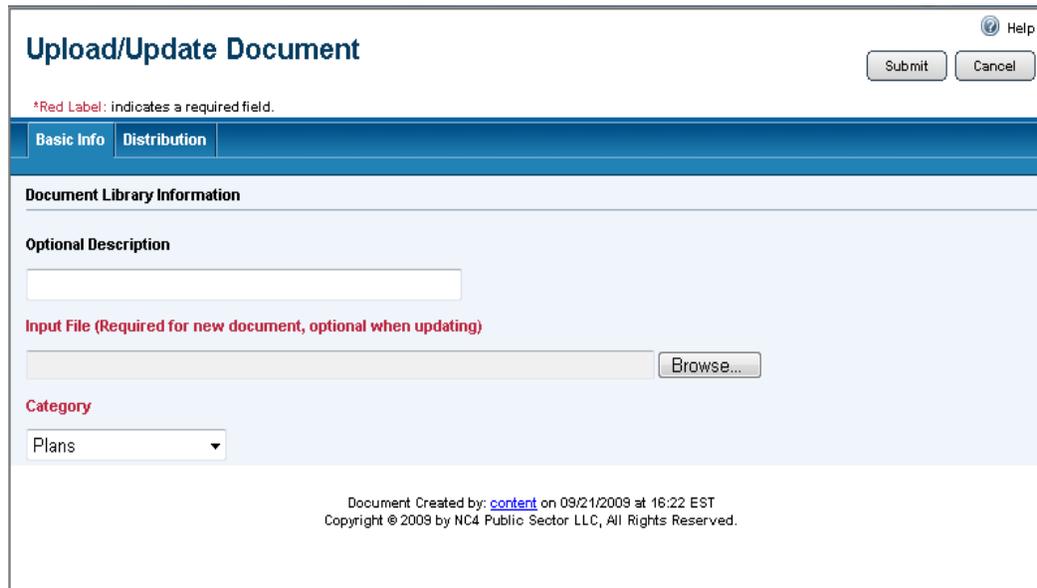


Figure 67 Upload/Update Document screen

- 2 Key in the appropriate description of the document into the **Optional Description** field.
- 3 Click the **Browse** button to select a new or updated document as shown in Figure 68. Selecting an **Input File** is required.

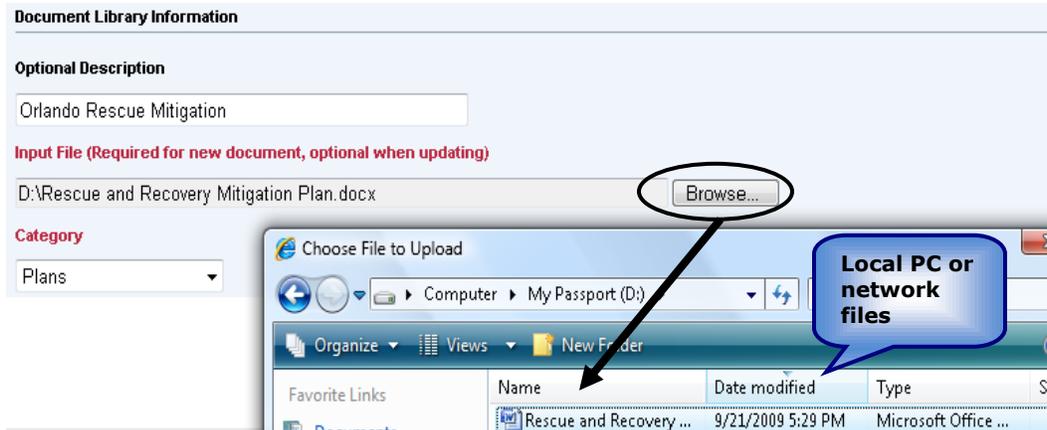


Figure 68 Attaching a Document

- 4 **Category** is a required field. Select a category from the drop down menu.
- 5 Click the button to save the new or updated document.

The new or updated document can be seen as a Name link in the **Document Library** summary screen which opens in *View* mode.

You will see the buttons at the end of each document listing. Use the **Update** button to edit or add the document and the **Delete** button to delete it. Use 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.