



# **Welcome to NC4 Training**

## **Module: Report Views**

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# 1 Module: Report Views

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.

In this module, we will address how to tailor the application **report access and views** to the operational needs of the organization. The **Report Types** we will be using are:

**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).

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.

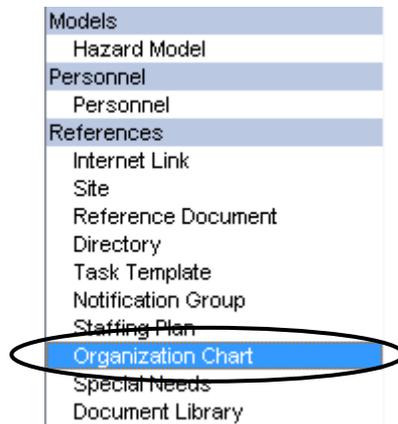


## 2 References-Organization Charts

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.

Report:  View by:

---

**Organization Charts**  [Expand All](#) [Collapse All](#)

---

**Auto Refresh**  Off  On This screen last updated (00:00:01:17)

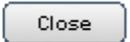
---

<input type="checkbox"/>	Organization/Positions	Menu Template Assigned
<input type="checkbox"/>	<a href="#">ATF Command Post</a>	
<input type="checkbox"/>	<a href="#">Call Center</a>	
<input type="checkbox"/>	<a href="#">E Team</a>	
<input type="checkbox"/>	<a href="#">EOC</a>	
<input type="checkbox"/>	<a href="#">EOC ESF</a>	

**Existing Organizations are listed.**

Figure 2 Organization Chart Summary Screen

**Figure 3 Org Chart in View Mode**

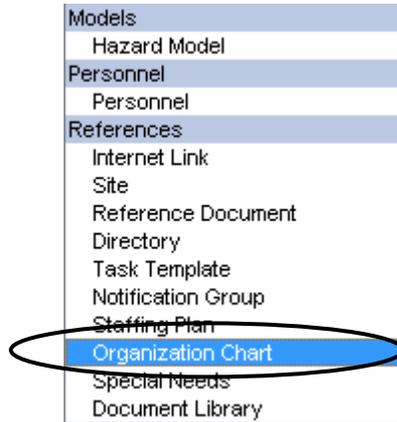
You will see the     buttons in the upper right of the **Organization Chart** form depending on your access level and discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a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

### 2.3 Creating an Organization Chart

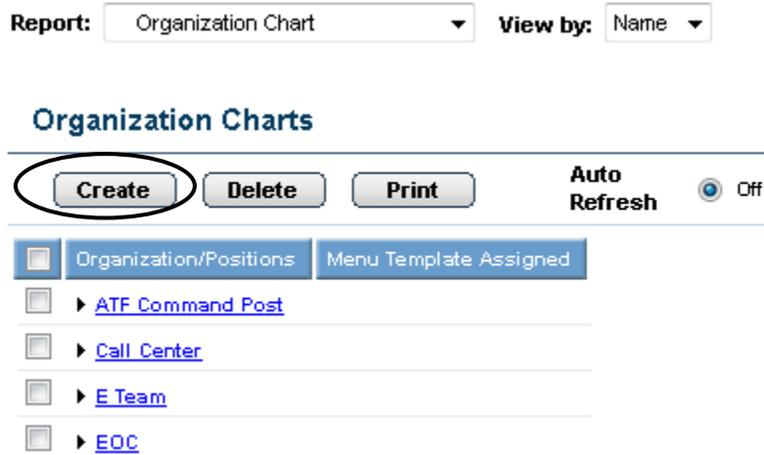
To create a new Organization Chart, perform the following steps:

- 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.

The screenshot shows a web form titled "Organization Chart". At the top right, there are "Submit" and "Cancel" buttons, and a "Help" icon. Below the title, a red asterisk indicates a required field. The form is divided into sections: "Basic Info" (highlighted in blue), "ORGANIZATION INFORMATION:", "Organization Name:" (with a text input field), "Contact Info:" (with a larger text input field and an "Expand" button), and "Comments:" (with a text input field and an "Expand" button).

**Figure 6 New Organization Chart**

- 4 Click the  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.

Report: Organization Chart View by: Name

Organization Charts

Expand All Collapse All

Create Delete Print

Auto Refresh Off On This screen last updated (00:00:04:00)

- Organization/Positions Menu Template Assigned
- ATF Command Post
- Call Center

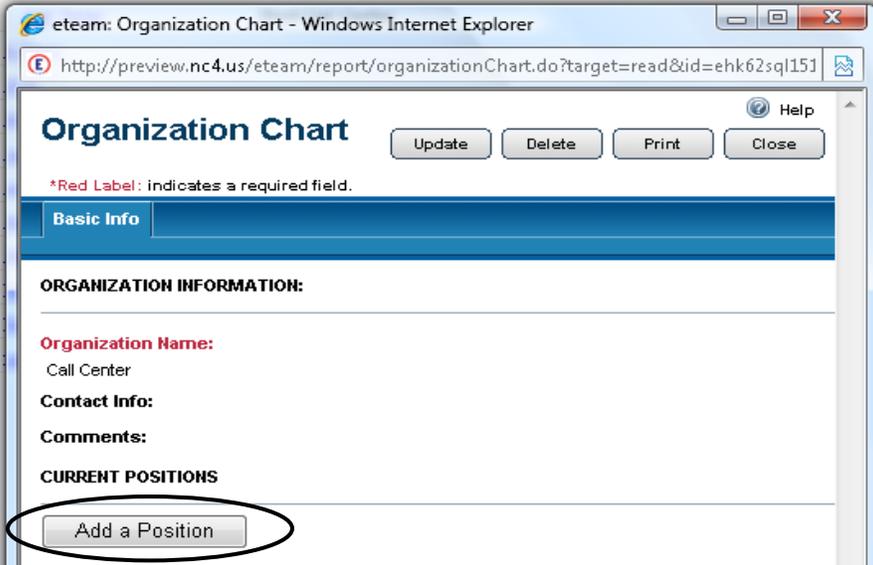
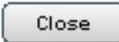


Figure 7 Organization Chart in View mode

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.



## 2.4 Review Exercise-Organization

In this section of the module, you will follow a step-by-step walk through of creating an Organization. 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.

 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.



## 2.5 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:

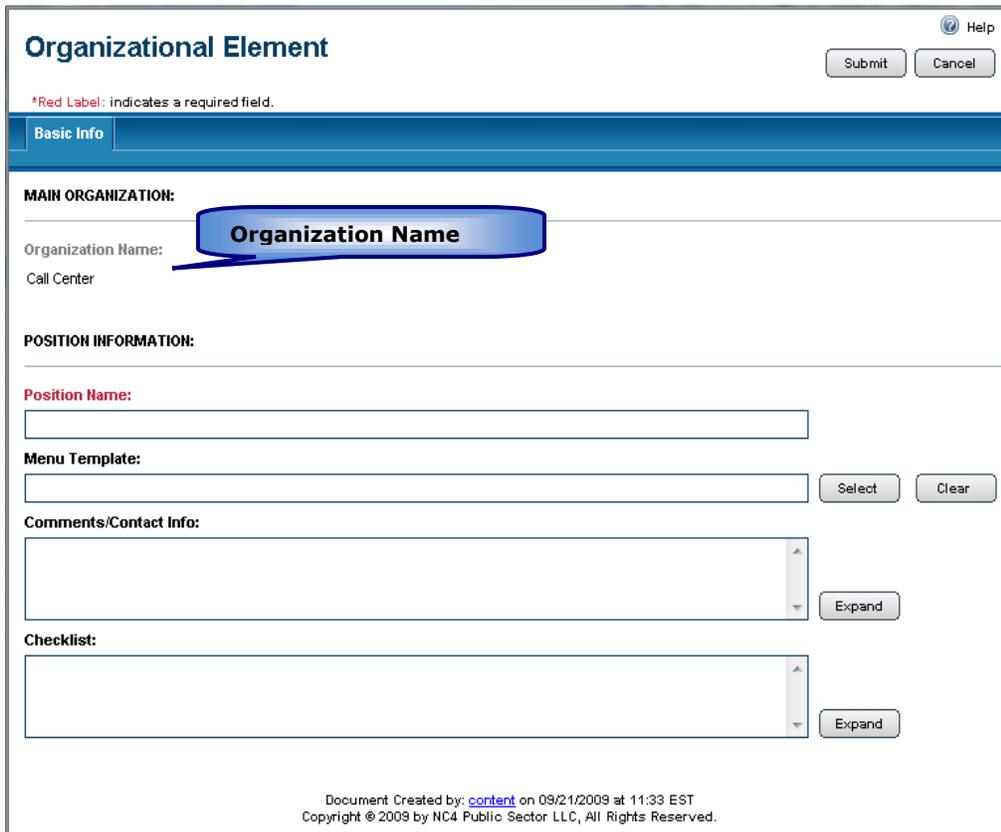
- 1 Click on or expand an existing **Organization Name** link as shown in Figure 8.

The screenshot displays the NC4 software interface. At the top, there are dropdown menus for 'Report: Organization Chart' and 'View by: Name'. Below these are buttons for 'Create', 'Delete', 'Print', 'Refresh', and 'Expand All'. A sidebar on the left lists various organization categories, with 'Call Center' highlighted. A blue callout bubble points to this link. A preview window is open, showing the 'Organization Chart' for the 'Call Center'. The window contains sections for 'Basic Info', 'ORGANIZATION INFORMATION', and 'CURRENT POSITIONS'. The 'Add a Position' button is circled in black. A separate box on the right contains the text: 'Positions are added to an Organization Chart one at a time.'

Figure 8 Open an Existing Organization



- Click the  button which will open to the **Organizational Element** window, as shown in Figure 9.

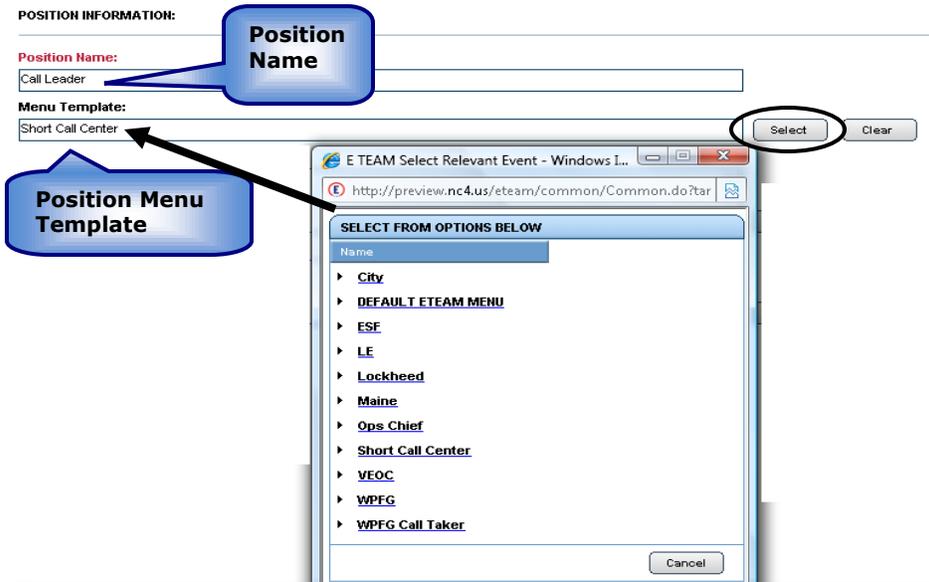


**Figure 9 Organizational Element Window**

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

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

- 4 Select a **Position Menu Template** by clicking the  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 appropriate **Comments/Contact Info** and **Checklist** duties for the position as shown in Figure 11.

**Comments/Contact Info:**

Janet Ery, Contact (222)123-4567



**Checklist:**

Coordinates and manages call center operations.

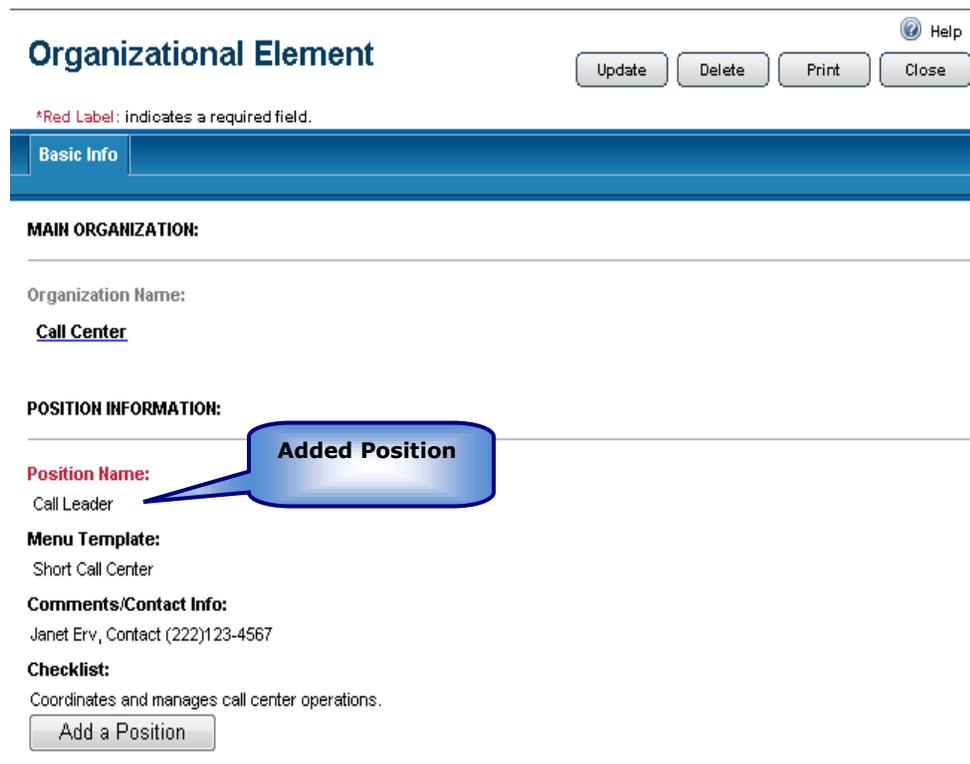


**Figure 11 Contact Info and Checklist Fields**

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  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.



**Organizational Element** Help

Update Delete Print Close

\*Red Label: indicates a required field.

**Basic Info**

**MAIN ORGANIZATION:**

Organization Name:  
Call Center

**POSITION INFORMATION:**

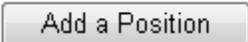
**Position Name:** Added Position  
Call Leader

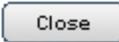
**Menu Template:**  
Short Call Center

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

**Checklist:**  
Coordinates and manages call center operations.

**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  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     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.

### 2.5.1 Completed Organization Chart with Positions

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

Report: Organization Chart View by: Name

---

**Organization Charts**

Create Delete Print

<input type="checkbox"/> Organization/Positions	Menu Template Assigned
<input type="checkbox"/> <a href="#">▼ American Red Cross</a>	
<input type="checkbox"/> <a href="#">▼ Chapter Director</a>	06 Mass Care
<input type="checkbox"/> <a href="#">▼ Disaster Services Director</a>	06 Mass Care
<input type="checkbox"/> <a href="#">Mass Care Officer</a>	06 Mass Care
<input type="checkbox"/> <a href="#">▶ E Team</a>	
<input type="checkbox"/> <a href="#">▼ EOC</a>	
<input type="checkbox"/> <a href="#">01-Director</a>	
<input type="checkbox"/> <a href="#">▼ 02-Command Staff</a>	
<input type="checkbox"/> <a href="#">03-Senior Emergency Management Coordinator</a>	
<input type="checkbox"/> <a href="#">▶ 14-Operations Section</a>	
<input type="checkbox"/> <a href="#">15-Logistics Section</a>	
<input type="checkbox"/> <a href="#">16-Planning and Intel</a>	
<input type="checkbox"/> <a href="#">17-Finance and Administration Section</a>	
<input type="checkbox"/> <a href="#">▶ 09-Liaisons</a>	

**Figure 13 Completed Organization Chart with Positions**

Organization Charts can be created and updated at any time.



## 2.6 Review Exercise- Adding a Position

In this section of the module, you will follow a step-by-step walk through of adding 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**, and the **positions** in 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 **Add a Position to an Organization Chart**.*

In this **Organization Chart-Add a Position** 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 Name 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 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.

5. Go to the **Checklist** section.
  - a. Key in four duties that the position is required to perform.
6. 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.



## 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 will 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.

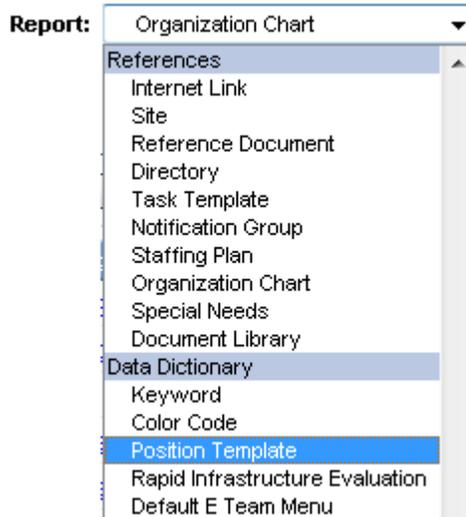
**Position Menus** consist of two steps. The first step is "**creating**" the menu template, the second is "**assigning or associating**" the menu template to a position within an organization. The **Position Template** can be assigned to more than one organization or position.



### 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 Menu**. 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 structure for Position Template.

**Figure 14 Selecting Position Template**

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

Report:  View by:

**Position Template by Name**

**Auto Refresh**  Off

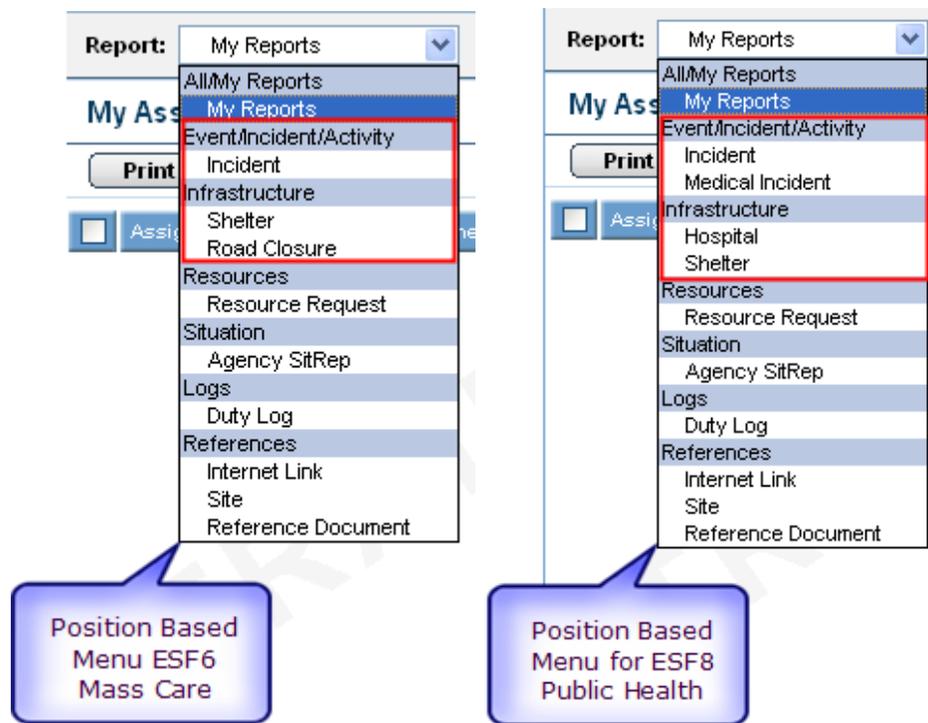
<input type="checkbox"/>	Name	Last Updated
<input type="checkbox"/>	<a href="#">City</a>	06/25/2008 at 04:53 EST
<input type="checkbox"/>	<a href="#">ESF</a>	06/25/2008 at 04:56 EST
<input type="checkbox"/>	<a href="#">LE</a>	07/22/2009 at 08:52 EST
<input type="checkbox"/>	<a href="#">Lockheed</a>	10/01/2009 at 16:04 EST

**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.

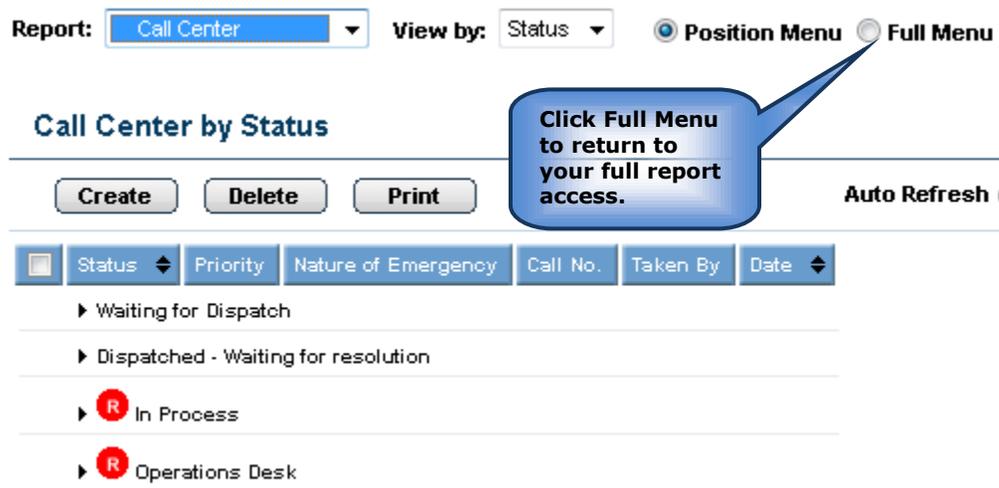
Updates made to a **Position Template** take effect immediately. However, a logged on user will not see the changes until they:

- 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 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.

Report:  View by:

**Position Template by Name** Expand All Collapse All

**Create** **Delete** **Print** **Auto Refresh**  Off  On This screen last updated (00:00:00:25)

<input type="checkbox"/>	Name	Last Updated
<input type="checkbox"/>	<a href="#">City</a>	06/25/2008 at 04:53 EST
<input type="checkbox"/>	<a href="#">ESF</a>	06/25/2008 at 04:56 EST
<input type="checkbox"/>	<a href="#">LE</a>	07/22/2009 at 08:52 EST
<input type="checkbox"/>	<a href="#">Lockheed</a>	10/01/2009 at 16:04 EST

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

**Figure 18 Creating a Position Template**

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

**Position Template**

\*Red Label: indicates a required field.

**Basic Info** **View Options**

**ENTER TEMPLATE INFORMATION**

\*Template Name

Description

**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.

**Position Template** Help  
Submit Cancel

\*Red Label: indicates a required field.

**Basic Info** **View Options**

Check to Allow User to Toggle Between Full/Position Menus

**VIEW MENU OPTIONS**

Select view(s) to appear on the View/Update menu.  
Click on link below to view all options available. When finished defining the menu, click SET DEFAULT VIEW and make a selection to display at log in.

<a href="#">All My Reports</a>	<a href="#">Event/Incident/Activity</a>	<a href="#">Disaster Relief</a>	<a href="#">Infrastructure</a>
<a href="#">Damage Assessment</a>	<a href="#">Resources</a>	<a href="#">Situation</a>	<a href="#">Tasks</a>
<a href="#">Logs</a>	<a href="#">Models</a>	<a href="#">Personnel</a>	<a href="#">References</a>
<a href="#">Data Dictionary</a>	<a href="#">Administration</a>		

[Set Default View](#) [Set Menu Options](#)

Double click a view to ADD to the menu Double click a view to REMOVE from the menu

>>

All >>

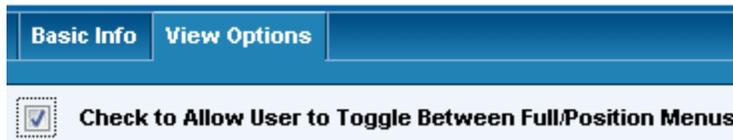
<<

All <<

**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 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 Name link you click moves to the box on the right, as shown in Figure 25.

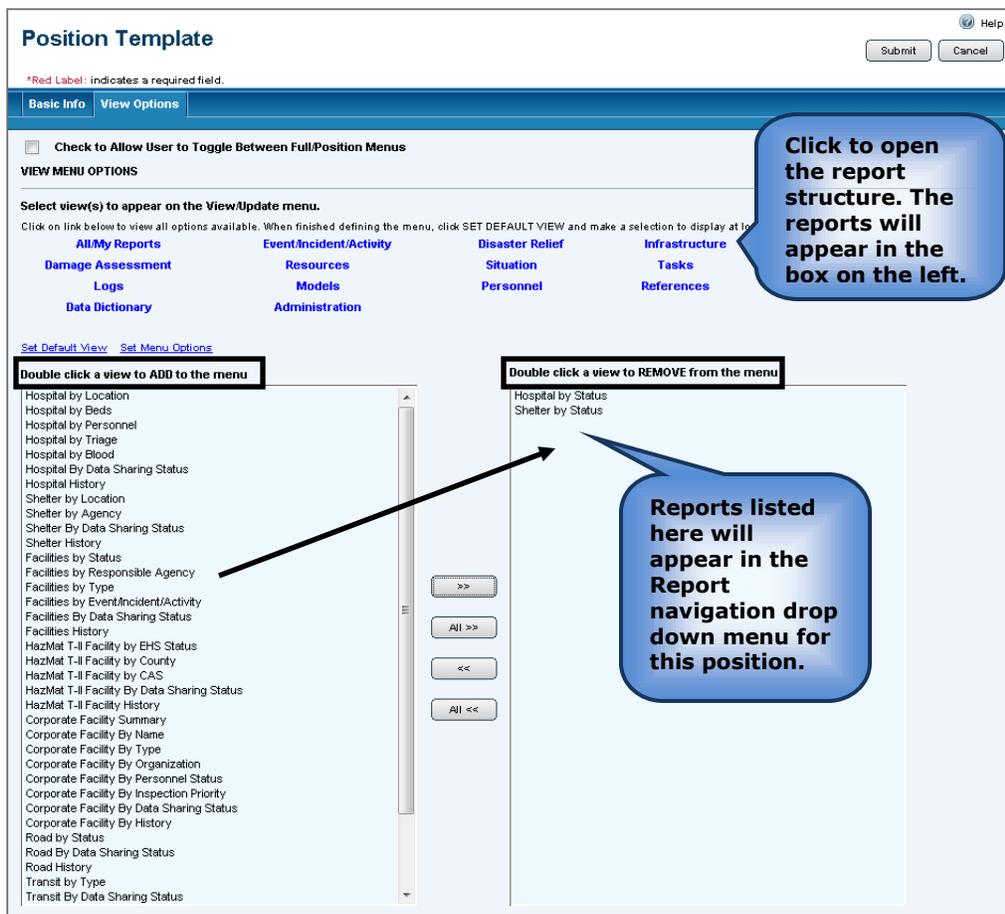
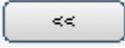


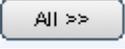
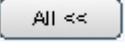
Figure 25 Selecting Report Options

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 Name link. Double clicking the report Name 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

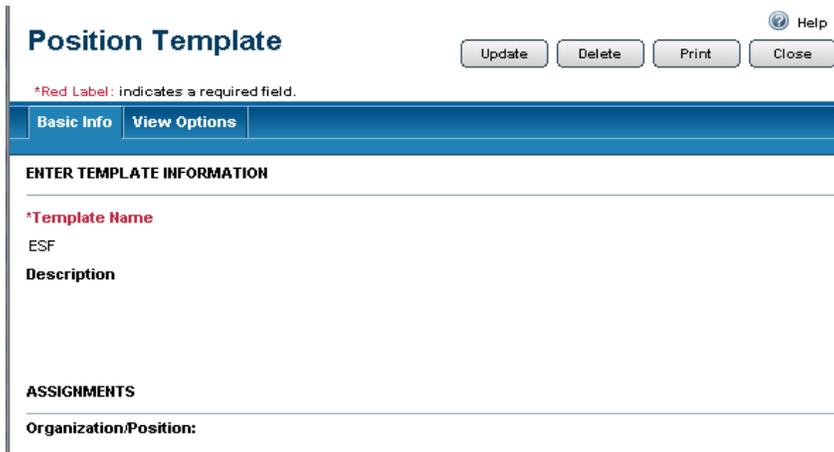
- Click the  button to move the entire report list from the left to the right, which will add all the reports to this position's Report navigation drop down menu.
- Click the  button to move the entire report list from the right to the left, which will remove all the reports from this position's Report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

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



### 3.4 Completing a Position Template

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



**Position Template** Help

Update Delete Print Close

\*Red Label: indicates a required field.

**Basic Info** **View Options**

**ENTER TEMPLATE INFORMATION**

\***Template Name**  
ESF

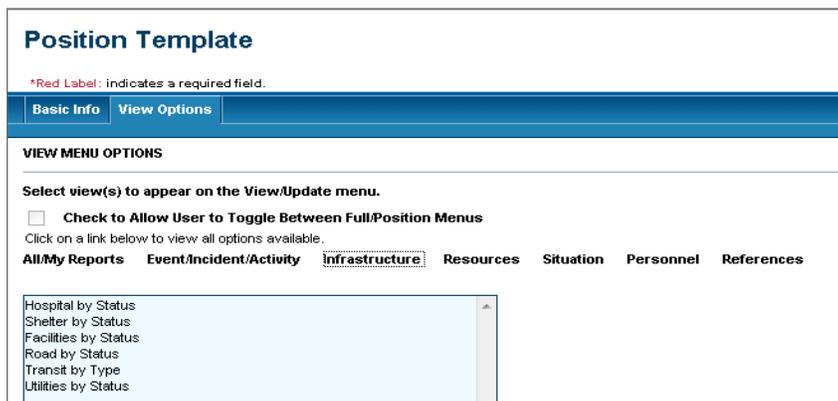
**Description**

**ASSIGNMENTS**

**Organization/Position:**

**Figure 26 Completed Position Template in View Mode**

To view the list of reports you selected for the **Report** navigation drop down menu with 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.



**Position Template**

\*Red Label: indicates a required field.

**Basic Info** **View Options**

**VIEW MENU OPTIONS**

Select view(s) to appear on the View/Update menu.

Check to Allow User to Toggle Between Full/Position Menus  
Click on a link below to view all options available.

**All/My Reports** **Event/Incident/Activity** **Infrastructure** **Resources** **Situation** **Personnel** **References**

Hospital by Status  
Shelter by Status  
Facilities by Status  
Road by Status  
Transit by Type  
Utilities by Status

**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  button to open the report in Edit mode to update and edit the data fields.
- **Delete** button – Click the  button to delete this report from active view. This report will be maintained for viewing, but not updating in History.
- **Print** button – Click the  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.

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

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

### 3.6 Review Exercise-Position Template

In this section of the module, you will follow a step-by-step walk through of creating a position template that can be assigned to a position.

Before you sign on to the application, you will need to know the name of the Organization, the subordinate positions and the reports that 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 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** Name link.
7. Click the **All>>** button to select all the reports in **All/My Reports**.
8. Click the **Event/Incident/Activity** Name link.
9. Click the following report Name 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.



## 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.

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

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

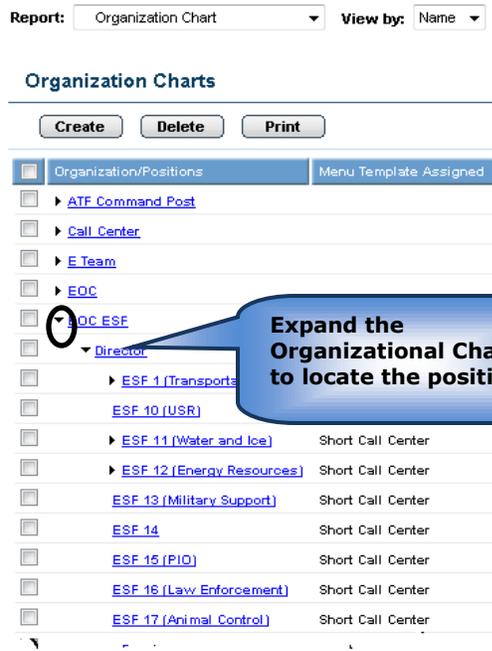
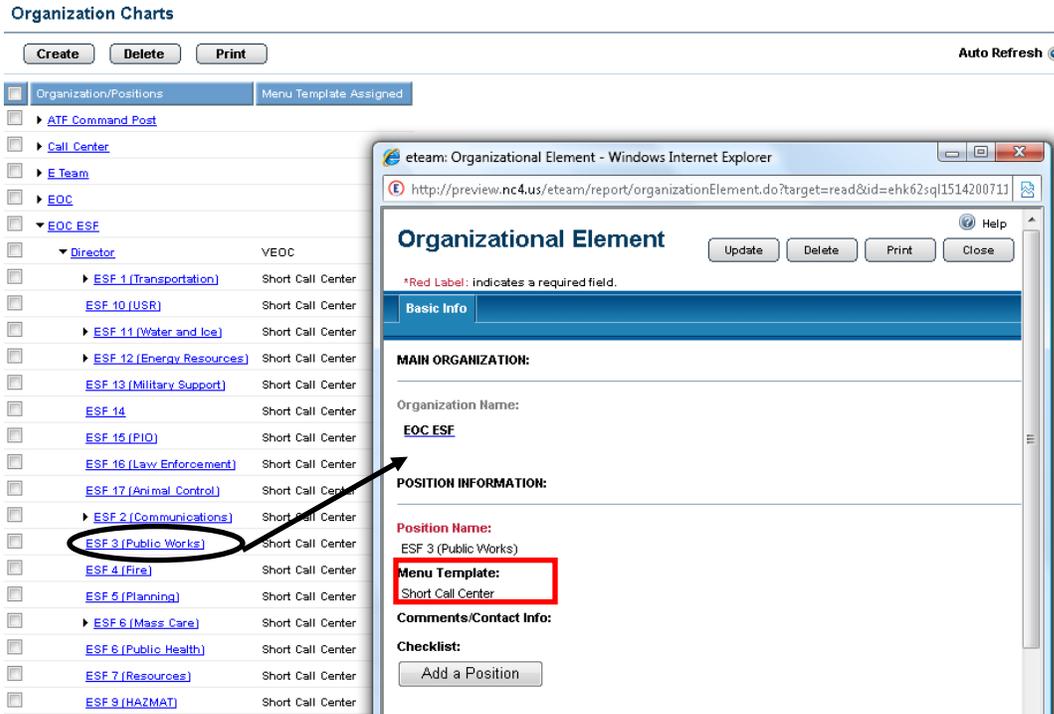


Figure 28 Organization Charts Summary Screen

- 3 Click the Name link of a **Position** within the organization.

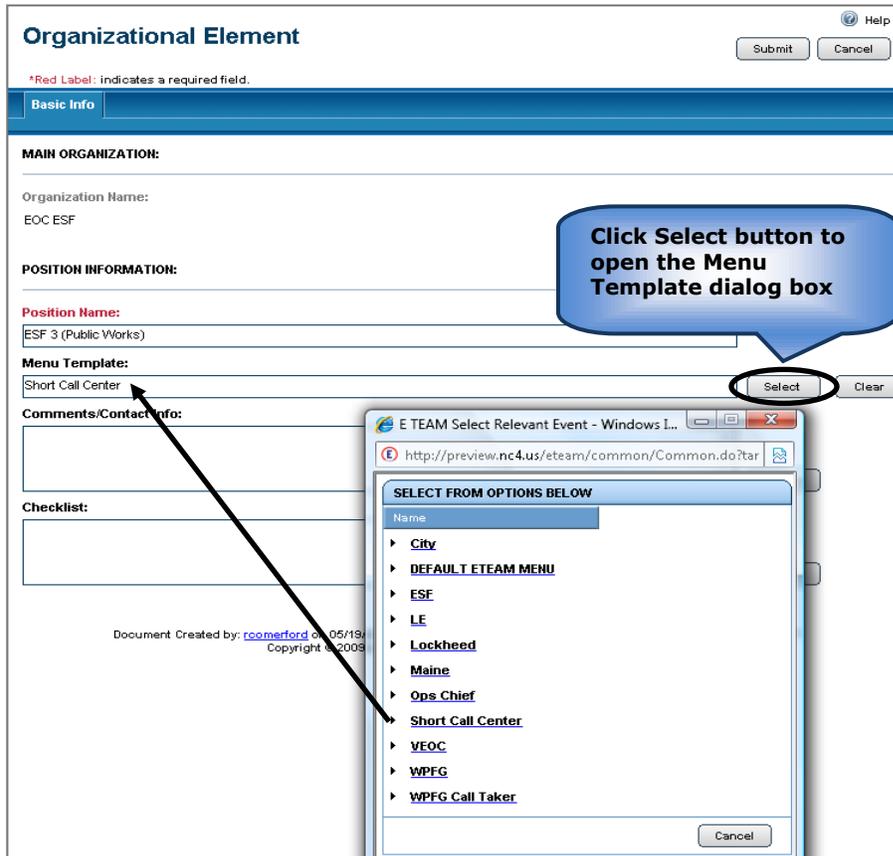
This will open the **Organizational Element** in *View* mode. Here you can see which **Menu Template**, if any, is assigned to this Position, as shown in Figure 29.



**Figure 29 Viewing an Organizational Element**

- 4 Click the  button to open the **Organizational Element** form to update the **Menu Template** field.

- 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**

- Click the **Menu Template** Name link to populate the Menu Template field.
- 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 Template to a New Position

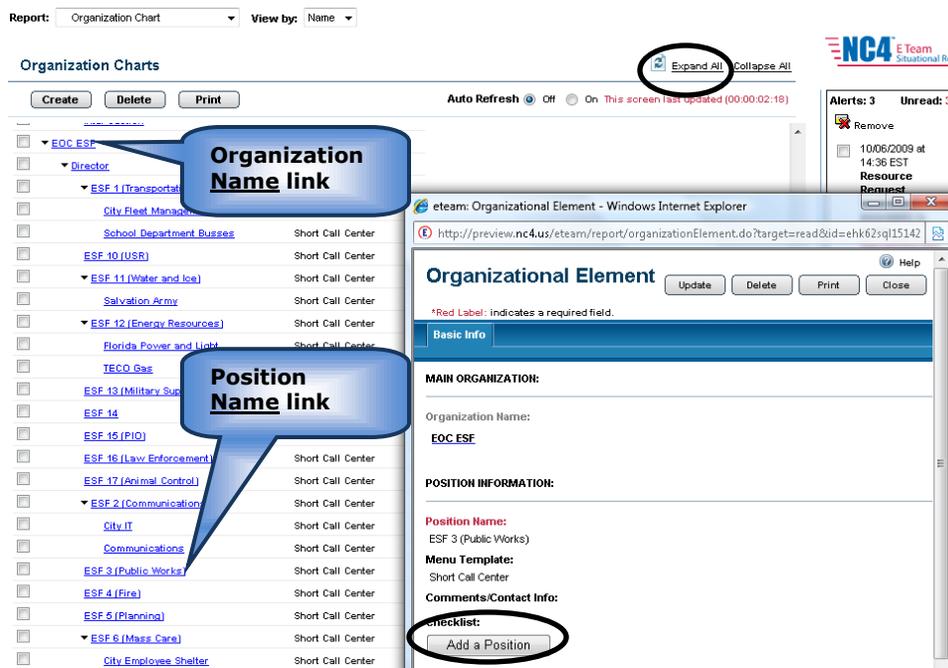
Assigning a Position Based Menu also occurs when a new position is added to an organization chart. Assigning a **Position Template** when creating a new position is accomplished in the same manner as assigning a **Position Template** to an existing position.

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.

**Organizational Element** Help

Submit Cancel

\*Red Label: indicates a required field.

**Basic Info**

**MAIN ORGANIZATION:**

Organization Name:  
EOC ESF

**POSITION INFORMATION:**

**Position Name:**

**Menu Template:**  
Short Call Center Select Clear

**Comments/Contact Info:**  
 Expand

**Checklist:**  
 Expand

**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 Name 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.



The screenshot shows a web-based form titled "Organizational Element". At the top right, there is a "Help" icon and two buttons: "Submit" and "Cancel". Below the title, a note states: "\*Red Label: indicates a required field." The form is divided into sections: "Basic Info" (highlighted in blue), "MAIN ORGANIZATION:", "POSITION INFORMATION:", "Menu Template:", "Comments/Contact Info:", and "Check List:". The "Organization Name" field contains "EOC ESF". The "Position Name" field contains "HazMat Coordinator". The "Menu Template" dropdown is set to "ESF10-HazMat Coordinator", with "Select" and "Clear" buttons. The "Comments/Contact Info" field is empty, with an "Expand" button. The "Check List" contains two items, each with an "Expand" button. At the bottom, a footer reads: "Document Created by: [Instructor 1](#) on 08/21/2006 at 05:03 PDT. Copyright © 2006 by NC4 Public Sector LLC, All Rights Reserved."

**Figure 33 Completed Position with Menu Template**

- 9 Click the  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.

**Position Template** Help

Update Delete Print Close

\*Red Label: indicates a required field.

**Basic Info** View Options

**ENTER TEMPLATE INFORMATION**

**\*Template Name**  
ESF6

**Description**  
position menu for ESF6 - Mass care

This Position Template is assigned to these positions

**ASSIGNMENTS**

**Organization/Position:** [EOC ESF,EOC Director,ESF 6 Mass Care](#)  
[EOC ESF,EOC Director,ESF 6 Mass Care,City Chapter of the Red Cross](#)  
[EOC ESF,EOC Director,ESF 6 Mass Care,City Employee Shelter Team](#)  
[EOC ESF,EOC Director,ESF 6 Mass Care,Shelter Manager](#)

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**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.

### 4.3 Review Exercise-Assigning a Position Template

In this section of the module, you will follow a step-by-step walk through of assigning a position template to a position.

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 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 Name link of the position.
  - a. Click the Name 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 Name 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 Chart and Position 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.