

## Common Report Features and Functions

[supportcenter.nc4.com/hc/en-us/articles/217944168-Common-Report-Features-and-Functions](https://supportcenter.nc4.com/hc/en-us/articles/217944168-Common-Report-Features-and-Functions)

E Team reports contain many common features and functions, learning how to use these enables you to move throughout E Team with ease.

### Required Fields

Fields marked with a red label indicate that the field is required. You must enter data in these fields in order for the report to be accepted by the system. If you miss a required field, the system will prompt you to enter the required data on Submit.

### Date/Time Fields

Any time you need to enter a date and time you will be using the Date Dialog windows. All fields requiring date/time input include a Set button or text hyperlink. Clicking either of these options opens the initial Date Dialog window.

1. To select the current date and time click on OK.
2. To change the date, click Calendar and a calendar window opens on which you set the date.
3. Use the arrows to change the month and year. Click on Today to reset the calendar to today's date. Click on a day to select it and close the calendar.
4. To change the time, click the drop down arrow in the hour and minute fields and make your selections.
5. Click Clear to clear all fields and start over.
6. Click Cancel to close the window without setting/changing date/time.
7. When you are done click OK to save your settings.

### Picklists

The values contained in the E Team picklists can be customized by your administrator to meet the needs of your organization. If you need an item permanently added to the list, contact your E Team system administrator.

The E Team application uses three basic means by which to make selections from predefined lists.

1. Drop down picklists have an arrow on the right of the input field. Click the arrow and the available list displays. Select the item you want, and it appears in the input field.
2. Multi-picklists have a Select button or text hyperlink next to the field. Clicking on either of these options opens a window containing all available choices. You can select as many items as you wish. Your selection(s) will appear in the input field.

\*Status:

Select One
Black-Major Assistance Required
Red-Assistance Required
Yellow-Under Control
Green-Resolved
Gray-Unknown
Blue-Report Closed

**Supporting Agencies Select**

**SELECT FROM OPTIONS BELOW**

- ☐ Agricultural Commissioner/Weights and Measures
- ☐ Alt Public Defender
- ☐ Animal Care and Control
- ☐ Assessor
- ☐ Auditor-Controller
- ☐ Beaches and Harbors
- ☐ Emergency Management
- ☐ FBI
- ☐ FEMA
- ☐ Fire Dept
- ☐ Health
- ☐ HHS
- ☐ Police Dept
- ☐ Public Works
- ☐ SNS
- ☐ Transportation

OK Cancel

3. Search/Add picklists are drop down picklists that can display a Search/Add or Select button or text hyperlink next to the field. You can use the drop down arrow, when present, to make a selection, or click on the Search/Add option to open a window allowing you to:

- Search for an item by typing that item into the field. This causes the list to auto scroll down to the closest match. Use of this feature saves time when presented with long picklists.
- Add a new item, if the one you need is not on the list, by typing into the Other field and clicking on the Add button. Adding an item in this fashion will NOT permanently add the item to the drop down list for future.
- When done click *Add* to close the window and see your results in the input field.

**Facility Type Search/Add**

Select One

**Site Type**

Search:

- Airport
- Bank
- CID Storage
- COOP Facility
- Corporate Campus
- Daycare
- Distribution Center
- Embassy
- Executive Home
- Factory
- Headquarters
- Headquarters Annex
- Military
- Office Building

Other:

Add Cancel

### Attachment Fields

You can attach a file or a website reference to any E Team report using the Attachments section. File attachments can be added or deleted ONLY in read mode of the report.

File attachments can be added multiple ways:

#### 1. Standard Document Attachment

- Click Add From File to open the E Team Attachments window.
- Click Browse to open your system's standard file selection window and make your selection.
- The file selection window will close and the selected file name is displayed in the File Attachment field.
- If you wish, you may enter an Optional Description for the file selected. This description will appear instead of the actual file name when viewing the attachment list for the report. If you do not enter an Optional Description the actual file name will display in E Team.
- Click Submit to close the Attachments window. The attached file description/name is now displayed with an active document link.

#### 2. Document Library. Display of the Add From Library option is controlled by your E Team system Administrator and may not be visible to all users.

- Click Add From Library to open the E Team Document Library window.
- Click on the plus "+" plus or "-" minus symbols next to the folders in the left frame to expand/collapse sub-folder options.
- Click on a folder to display all available files in the right view frame.

- Place a checkmark in the box next the file(s) you wish to attach to your document.
- Click on Select/Attach button at the top right to attach the document(s).

3. Web Page Attachments. You can attach a web page reference to any E Team report using the Attachments section of the report. Web page references can be added and deleted ONLY from the create and update modes of the report. Users can then jump to the web page while in read-only mode of the report by clicking the web page link.

- With the document in edit mode, select the Attachments tab.
- Enter the url by typing directly in the Web Pages field. You may enter as many references as necessary. Separate each entry with a comma or line break. The data will be saved when you submit the report. You must enter the complete URL of each website or page to ensure a link will be created for the entry.  
*Example: <http://support.nc4.us>.*

#### Viewing File Attachments

You can view an attached file from the read or update mode of the report by clicking on the attachment listing link to open for viewing or to save to file.

#### Downloading Attachments

Attachments can only be downloaded from read mode of the report. You may download any number of attachments at one time.

- With the document in read mode, select the Attachments tab.
- Click on the checkbox to the left of the attachment listing.
- Select all you wish to download.
- When ready, click on the Download option at top of the listing section. The downloaded file(s) will be saved as a single .zip file.

#### Deleting Attachments

Attachments can only be deleted from read mode of the report. You may delete any number of attachments at one time.

- With the document in read mode, select the Attachments tab.
- Click on the checkbox to the left of the attachment listing.
- Select all that are applicable.
- When ready, click on the Delete option at top of the listing section.  
*The deleted file(s) will no longer be listed as an attachment to this report, however, all deleted attachments will remain accessible in History.*

#### Access Control Fields

The Access Control section of the report is used to define who can view the report. Fill in this section ONLY IF YOU WISH TO RESTRICT ACCESS to the report from the general population of E Team users. If you leave the fields empty, the report will be accessible by all E Team users.

On submit of a document E Team validates access control setting against responsibility assignments and notification recipients. If a user in either of those is not included in the form access control, the user will be presented with a dialog containing a list of users impacted to allow for changes to be made to the form as needed.

**ACCESS CONTROL**

(Unless you limit access control as specified below, this document is viewable by all E Team users.)

**Group 1**

[Text input field with dropdown arrow] [Select]

**Individual 2**

[Text input field with dropdown arrow] [Select]

1. Select all Groups that SHOULD HAVE access to the report. [Access Control Groups](#) are created by your system administrator. In addition, your system administrator may have elected to establish a default distribution setting for your organization. When this occurs the default group data will appear in this field on all reports.
2. Select all individuals that SHOULD HAVE access to the report.

#### Geo-Location and Mapping Fields

When you work with reports in E Team, you can enter information that enables the system to generate icons to represent these reports, both on the map and in Incident report Geolocation Workflow view. You can then choose to display these icons on the E Team map by geo locating the report using the Location section fields within the report.

1. Click Select Site to open the Site Selection window containing a list of preloaded sites. If your site is not available in the list provided close the window. *Selecting a preloaded site causes the system to populate the Site Type, Address, City, State, Zip, Intersection, County, Geographic Area, Additional Location Data, Latitude, and Longitude fields for you from data contained in the associated Site Report.*

If you were unable to select a preloaded site or if data is missing, manually enter your information in the Site Type, Address, City, State, Zip, and Intersection fields.

*If the preloaded data is not accurate you can alter the data manually, however, adding or changing information to a preloaded site here, will not automatically update the associated Site Report. To update outdated site information for all users, you must update the Site Report located under References.*

2. Once you have entered the location data, you have the option of Geolocating (placing a report icon on the E Team map) in one of four ways:


- by Address or by Intersection
  - Click on the by Address or by Intersection option.
  - The results window will display allowing you to make a selection.

- Select *Accept* to accept the selection and close the results window.
- Select *Cancel* to close the results window without making a selection.
- Select *Show on Map* if you wish to see the selected location on the map. The map window will open to display the selected location to you. If you want to change the location position, close the window and make a different selection from the results window and repeat. When you are satisfied with the location position on the map, click *Accept* in the results dialog window.

- by Lat & Long

- If you know the latitude and longitude of the location you wish to mark on the map, you can use this information to geo locate the location. Click on the by Lat & Long option.
- Enter the Latitude and Longitude values in decimal degrees.
- Click *Accept* to close the window display the Latitude and Longitude on the report.
- Click *Cancel* to close the dialog and return to the E Team report. No data will be saved on the report and the form will NOT be geolocated.

- by Map

- Select the *by Map* option.
- Click the *Locate* button to launch the NC4 "locate" map window.
- Click the Locate widget  in the top right tool bar.
- Click on the map to set the location.
- Click *Reset* and click location on the map again to make a change if needed.

- When done click **Save** to accept the location and close the map window. The Latitude and Longitude will be posted to your report and the *Show on Map?* option will be set to **Yes**.

3. Next to *Show on Map?* there are two radio buttons that let you indicate whether you want this location displayed on the map. The default setting is **NO**. However, as soon as you geo locate, the system automatically changes this setting to **YES**. Alternatively, if you change the radio button to **YES** without geo locating, the system will prompt you to geo locate.

*Selecting the **Clear Latitude/Longitude Information** link causes the Latitude and Longitude fields to reset and removes the report icon from the map.*

Once a report has been geolocated the map can be launched from *Read-only* mode of the report by clicking on the *Display on Map* hyperlink located at the bottom of the geolocation section of the report. When launched in this manner the map will zoom to the associated report location.

The following icons are used in the Geolocation Workflow view for Incidents to indicate whether the associated Incident report has been geolocated:

#### Notification Fields

##### Standard Notification Fields



Indicates the report instance has been geolocated.



Indicates the report instance has not been geolocated.

You can use the Notification section to notify both E Team users and non-users about a report within the system. This section provides fields for you to select individuals from the E Team Directory and/or from a convenient list of predefined notification groups, as well as enter email addresses for those not appearing in either list.

Notifications can be sent as email, text, email pager, or E Team Targeted Alerts (default). E Team users select their Preferred Method of Notification when they complete or update their Personal Profile document.

##### Sending E Team Standard Notification

1. While in update mode of a report instance, select the Notification tab.
2. Select the Yes option.
3. Type in the Message field to include a text message that will appear in the message being sent.
4. Click on the Individuals text link. A list of all individuals contained in the E Team directory is displayed in the Select Recipient's box. You can sort listing by clicking on Name or Position headers.
5. Click on a name to add it to the Notification List. The selected name is removed from the selection list and placed in the Notification List field to the right. To remove a recipient from the Notification List click on name to move it back to the selection window.
6. Click on the Groups text link (Notification Groups and membership are managed created by your E Team system administrator) and repeat steps 4 and 5 above to select from a list of pre-defined groups.  
*You can view a groups membership by navigating to **References > Notification Group** in the E Team menu and selecting the Group.*
7. Enter email address(es) in the Other Email Addresses field to notify individuals not appearing in the lists provided.

Notification is triggered when you click on the Submit button of the report you are working on. At this time E Team validates the report instance access control settings against notification recipients. If a selected recipient has been restricted from viewing this document, the user will be presented with a dialog containing a list of users impacted to allow for changes to be made to the form as needed prior to sending the notification.

Targeted Alerts are generated for individuals and all members of a group who have selected E Team Alerts as a preferred method of notification on their Personal Profile document. Users who have chosen to receive Targeted Alerts will see their Targeted Alerts frame on the E Team main window update to reflect the new alert.

A document link will be included in notification received by E Team users who have selected email as their Preferred Method of Notification on their Personal Profile. When the link is clicked, the E Team login window will display and the user will be required to log into E Team prior to viewing the report. Once logged into the system, the associated report will be displayed.

Once the document has been submitted Send Notification will automatically be set back to No.

In the read mode of reports, the notification section will include a Targeted Alert Status button. When the Targeted Alert Status button is clicked, a new window opens displaying the status of all Targeted Alerts sent from this document. Each Alert listing will indicate a status of New or Read.

##### Outlook Notification Fields

Outlook notification can be used with Incident and Alert Bulletin reports ONLY. Use of Outlook notification will not impact concurrent use of other E Team notification options available on your system.

If your E Team application has been properly configured within the E Team Data Dictionary AND Outlook is enabled for use on the computer being used, you will be presented with an Outlook Notification Group selection window on Submit as shown below.

Please select a group/name from the list and click "Add" to add it to the "Selected" list box. After selecting the names/groups, please select "Send Email" at the bottom to complete.

**Notify Groups:**

EteamOutlookTesting

**Selected:**

Add>>> Remove

Send Email Cancel

You may select Cancel to close this window and skip Outlook Notification or follow the instructions below to generate an Outlook Notification.

1. Select from available groups on the right and add to the left.
2. When done, select Send Email.
3. The system will launch an Outlook pre-formatted email.
4. You may edit the email and send as usual, e.g. spell check, add attachments, additional recipients, etc.
5. When ready send via Outlook as usual.

#### Mass Notification Systems

E Team currently supports integration with [Everbridge](#) and [ERMS](#) mass notification systems. If your organization is using one of these systems, you will be presented with additional email options on the Notification section of reports. To review these options, click the system name above.

#### Responsibility/Assignment Fields

E Team provides a way for you to assign responsibility for reports and tasks at varying levels. Responsibility can be assigned to a single individual or to all individuals sharing a position within a selected Organization.

- Selecting an individual to be responsible for a particular report or task causes the system to populate the Agency, Organization/Location and Position fields for you with data from that person's Personal Profile document.
- Selecting an Organization/Location and Position first, filters the listing of Individuals from which to make a selection by displaying only those individuals where the profile matches the Organization/Location and Position selected.

When the document is submitted, the assigned E Team user(s) will be notified by means of a Targeted Alert. E Team users can also quickly locate their assignments in the My Assignments view.

On submit of each document E Team validates the report instance access control settings against responsibility assignments. If a user has been assigned responsibility but has been restricted from accessing the form a dialog containing a list of users impacted is presented to allow for changes to be made to the form as needed.

**RESPONSIBLE ENTITY:**

Clear Responsibility

☒ Uncheck to send Targeted Alert ONLY to the individual selected. When checked a Targeted Alert is sent to all users whose Personal Profile matches the Org/Location and Position selected.

Individual:  Select

Position:  Select

Organization/Location:  Select

Agency:  Select

- Click on Clear Responsibility to remove an existing entry.
- Leave box checked to assign to a position within an organization and then make the appropriate selections in the Organization/Location and Position fields.
- Uncheck the box to assign to an individual and then make selection from the Individual field.

*Please note that your E Team system administrator has the ability to set the default state of this field to be either checked or unchecked on all forms.*

#### Report Relationships

E Team provides you with the ability to relate most reports to an Event, Incident or Activity. This feature provides a way to capture the big picture and roll up related costs.

In general, your top level E Team report is an Event. Events can be comprised of multiple Incidents and/or Activities. Typically, all other system reports are generated based on the occurrence of an Event, Incident or Activity.

Key views within E Team are setup to capture Event detail. Therefore, it is important that you select relationship values at an Event level whenever possible. If you do not know the name of the Event, you can select the Incident or Activity instead.

When you are presented with a Related Report field:

1. Click Select to open the relationship window.
2. Make a single selection from the available list. Options will be listed alphabetically by report type.
  - A - Indicates *Planned Activity*
  - E - Indicates *Emergency Event*
  - I - Indicates *Incident*
  - P - Indicates *Planned Event*
3. Click OK.

Relationship of a report to a specific Event can also be preformed directly from within the Event report. While in the Event report, users with the proper rights have the ability to relate or un-relate reports using the Related Reports field found on both the Emergency and Planned Event reports. Details on performing this function can be found by clicking on the help option at the top of an Event Report.

### **Situation Summary**

The situation summary is a critical element to many reports. The situation summary provides a chronological account of the situation. The situation summary should be updated as often as possible to provide a current overview of the situation.

The *Initial Situation Summary* is generally added when the document instance is created.

You can add additional summary documents in both read and update modes of the form by clicking on the *Add Situation Summary* link displayed at the top of this field once an initial Situation Summary has been entered and saved. On click a new window opens allowing you to enter the summary detail and submit.

All summary documents created will appear in chronological order in this field with the most recent on top. Other than to correct grammar or spelling errors, existing situation summary document content is generally not altered. However, these entries can be updated or deleted by clicking on the specific situation summary listing link while in read-only mode of the form instance.