

## Working With E Team Reports

[supportcenter.nc4.com/hc/en-us/articles/218454307-Working-With-E-Team-Reports](https://supportcenter.nc4.com/hc/en-us/articles/218454307-Working-With-E-Team-Reports)

### Report Modes

E Team reports are displayed in three distinct modes.

1. **Create Mode** – When you click the Create button from any view page of a particular report, a new report window will open. In most cases, all fields in the new report will be completely blank until you enter data. In some instances, the system will pre-populate fields for you to save time. Online Help identifies these system-generated fields.
2. **Read Mode** – When you make a report selection from within the View Frame, the report opens in a new window. Although this mode is generally for viewing report contents and accessing a document to make updates, there are some actions such as adding attachments that can be done while in this mode. You can read more about these read-only mode actions by [clicking here](#).
3. **Update Mode** – When you need to make changes to a report, clicking on the Update button of the report while in read mode will cause the report to open in a new window allowing you to add, change and save data as necessary.

### Document Locking

E Team is designed so that only one person at a time can access a report in Update mode. If you attempt to access a report that is in use by another E Team user, the system will display a message to let you know who is using the report. If you have the proper authorization, you will see a text link, *Take Over the Lock*, in this message window. Clicking this link releases the lock and in turn locks the original user out of the report, simultaneously causing a window to open on the original users' screen telling them that the document has been taken over by an administrator. Any changes made to the report WILL NOT be saved if the original owner is locked out in this manner.

### Report Layout

The top of each report contains the report title, key form action buttons such as Submit and Cancel, and a Help link that on click will open field help for that document. The reports consist of multiple tabbed sections containing input fields. Clicking on a tab switches focus to that report section. Each tabbed section is scrollable.

### Report Versions

All reports created within the E Team application are saved in History. Each time a report is submitted a new history document is created. History lets you review every change that was made to each report. Later E Team System Administrators can move these history records to an Archive. If needed, documents in archive or history can be restored to activity.

### Report Buttons/Links

The following report action buttons/links are found throughout the application in Create and Update modes of a form instance.

- **Submit** – When you have finished creating or updating a report, click the Submit button to save your changes.
- **Cancel** – To close a report or selection dialog window without saving changes, click the Cancel button.
- **Set** – All fields requiring date/time input contain a Set button. Clicking this button causes the Date Dialog window to open. Click Date and a calendar appears on which you set the date. For setting the time, click the arrow in the hour and minute window and select the correct numbers, then click the OK button. If you just click OK, you get the present time. E Team uses a 24-hour military time clock and Pacific Standard Time (PST) as the default. Your E Team System Administrator can change the time zone.
- **Select** – Select buttons or text links are used throughout E Team to open windows containing data from which to make a selection.
- **Clear** – Clear buttons or text links are used throughout E Team to allow you to remove data contained within a field.
- **Expand** – Expand buttons are used throughout E Team to allow you to read or enter large amounts of text in a small field. Clicking this button causes a new window to open that displays all existing data and allows you to add more.
- **Update** – Update buttons are used throughout E Team. If you are authorized to edit a report, you will see the Update button. Clicking this button will cause the report to open in a new window to allow for updating. Update buttons are also used within reports for the purpose of updating a particular field. Clicking this button causes a new window to open, providing a field in which to add data. Documents that are updated are automatically stamped by the system with the name of the individual performing the update, and the date and time of the update.

The following report buttons/links are found in Read mode.

- **Print** – Clicking this button causes a printable version of the report to open in a new window. To print, click the Send to Printer button in this new window.
- **Update** - If you are authorized to edit a report, you will see the Update button. Clicking this button will cause the report to open in a new window to allow for updating.
- **Delete** – Some E Team users are authorized to delete reports. For these users, a Delete button will be visible at the top of the report. Clicking this button causes the deletion process to begin. When complete, the report will only be available in the History file.
- **Duplicate** – This button is found on Resource Requests and Critical Asset reports. Clicking this button causes a duplicate of the document being viewed to open in a new window. The new document will retain some of the critical information found in the original request. This feature saves time by allowing you to modify the contents of a document and save it as new document.

- Split – This button is found on Resource Requests and Critical Asset reports. Clicking this button allows you to begin the process of splitting the document being viewed in order to have it acted upon by multiple agencies.
- Close – This button is found on all reports in both view and update mode. Clicking this button will close the report without saving any changes to the report.
- Add From File / Add From Library – These buttons are found in read mode under the Attachment tab on all reports that allow attachments to be added. Clicking Add From File will open the standard attachments dialog providing the user a browser-based attachments option. Clicking Add From Library will launch the E Team Document Library window, providing the user the ability to add attachments stored in the E Team Document Library
- Browse – This button appears in all Add Attachment windows and in the Case Management, Case Dependant and the Intel Biography reports where the picture of a person can be attached along with his/her biography. Clicking the Browse button opens the file directory on the user's system. The user can locate the file path of the attachment from the directory structure.