



# WebEOC<sup>®</sup> Dashboard

Administrator Guide

Version 1.0

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# Administration

This document describes the Dashboard feature from the admin manager in WebEOC®.

If your agency has an activation message implemented, it appears in the footer of the dashboard.

**Note:** Dashboard is not supported in migration mode.

## Adding an Administrator Dashboard

To add an administrator dashboard:

1. In the Admin window, click the **Process** tab.
2. Click the **Dashboards** link.
3. In the *Dashboards* window, click the **Create Dashboard** button.
4. In the *Create Dashboard* window, enter a name for the dashboard in the **Dashboard Name** field.

The screenshot shows the 'Dashboards: Create Dashboard' form. It includes a text field for 'Dashboard Name' with a red asterisk indicating it is required. Below this is a dropdown menu for 'Select Number of Items to Display' currently set to '3'. Underneath is a 'Select Layout' section with four grid icons: a 2x2 grid (the first one is highlighted in blue), a 1x2 grid, a 2x1 grid, and a 1x1 grid. At the bottom is a 'Select Items to Display in Your Dashboard' section with a large container divided into three panes (two side-by-side on top and one centered below them), each containing a blue plus sign icon.

5. Select the number of boards you want to display.
6. Select a layout from the options provided.
7. Click the plus symbol to include a board in the applicable pane.

8. In the *Select Dashboard Item Type* window, select **Board** and click the **Next** button.

Select Dashboard Item Type

Filter... Filter

Board  
Map

Next

9. In the *Select Board* window, choose a board to include and click the **Next** button.

Select Board

Filter... Filter

After Action Review  
Autonumber Example 2  
Autonumber Example 3  
Autonumber Examples  
Aviation Mission Tracker  
Business Status Summary  
Checklist  
Checklist (Published)  
Checklist (Working)  
County Disaster Declarations

Previous Next

10. In the *Select View* window, choose the view you want to display and click the **Next** button.

Select View

Filter... Filter

List  
Report

Previous Next

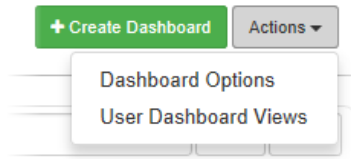
11. If the *Select View Filters* window appears, select the check box for any applicable filters. Filters do not apply to every view.
12. Repeat these steps for the other panes.
13. Click the **Save** button to create the dashboard.

## Adding and Assigning a User Dashboard

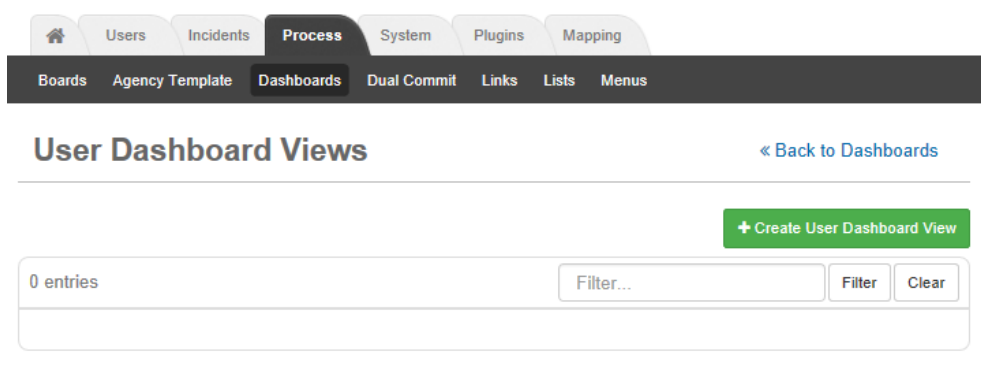
Users can build custom dashboards by clicking the **Dashboards** link on the control panel. Administrators must make the boards available to users using the Dashboards admin manager. For additional information, see the “Creating a Custom User Dashboard” topic in this guide.

To make boards available to users:

1. In the *Dashboard* window, select **User Dashboard Views** in the **Actions** menu.



2. In the *User Dashboard Views* window, click the **Create User Dashboard View** button.



3. In the *Add User Dashboard View* window, enter a name for the dashboard in the **Name** field. Since boards have multiple views and you can assign multiple board views to a dashboard, the name of the dashboard must be descriptive. For example, when creating an Event Reporting dashboard for the Logistics section, name the dashboard *Event Reporting - Logistics*.

### User Dashboard Views: Create User Dashboard View

[« Back to User Dashboard Views](#)

A screenshot of the 'Add User Dashboard View' form. The form has a grey header bar labeled 'Details'. Below the header, there are several fields: 'Name' with a red asterisk and an empty text box; 'Item Type' with two radio buttons, 'Board' (selected) and 'Map'; 'Board' with a dropdown menu showing 'After Action Review'; 'Display' with a dropdown menu showing 'List'; and 'View Filters' with an empty text box.

4. Select a board from the **Board** drop-down list.

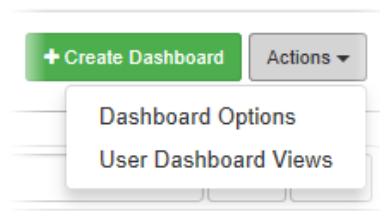
5. Select the applicable display for the board from the **Display** drop-down list.
6. If filters appear in the *View Filters* section, select the check box for the applicable filter. Filters do not apply for every view.
7. To grant access, assign one or more groups to the dashboard by selecting them in the **Available** list and use the right arrow to move them to the **Assigned** list.
8. Click the **Save** button.

## Launching Dashboards on Login

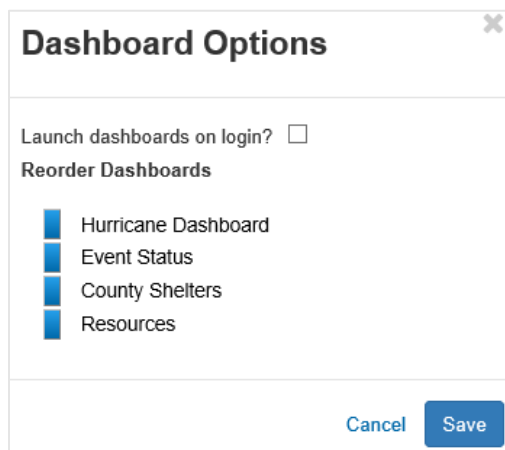
This feature affects all users assigned to the dashboard.

To launch dashboards on login:

1. In the *Dashboard* window, select **Dashboard Options** in the **Actions** menu.



2. In the *Dashboard Options* window, select the **Launch dashboards on login?** check box.
3. Click the **Save** button.

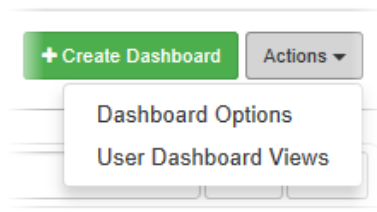


## Reordering Dashboards

In the Dashboards admin manager, administrators can change the order of the tabs that appear in the user's dashboard view.

To reorder the dashboard tabs:

1. In the *Dashboard* window, select **Dashboard Options** in the **Actions** menu.



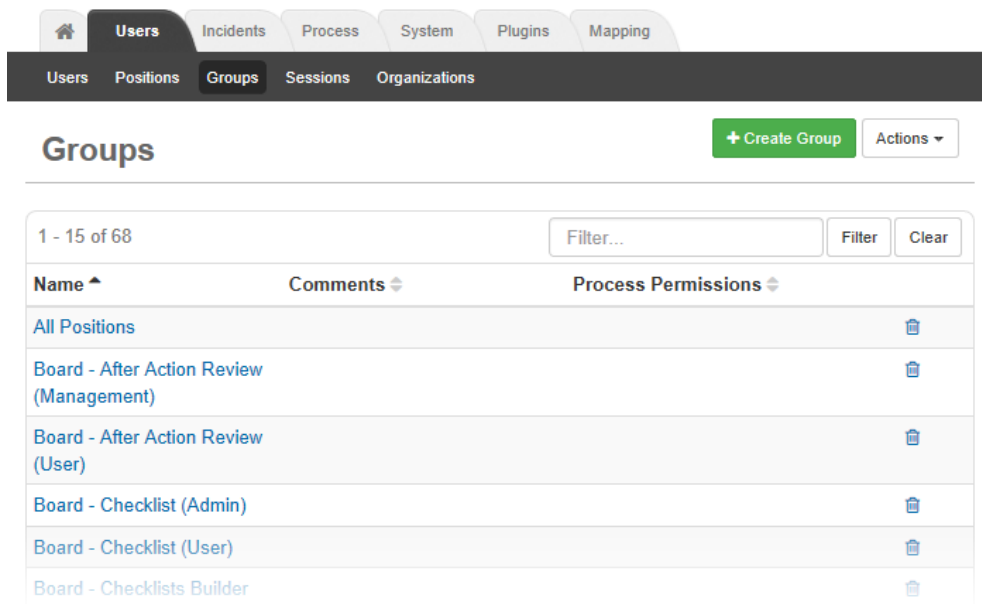
2. In the *Dashboard Options* window, select the box next to a dashboard name, and drag the dashboard up or down in the list.
3. Click the **Save** button.

## Assigning Dashboards to Groups

To give users access to the dashboards you have created, you must assign the dashboards to the appropriate groups using the Groups manager.

To assign dashboards to a group:

1. In the admin window, click the **Groups** link from the *Users* section.



2. In the *Groups* window, click the group you want to add dashboards to.
3. In the *Edit Group* window, click the *Dashboards* tab.



4. Select a dashboard from the **Available** list and click the right arrow to move the selection to the **Assigned** list.

**Groups: Edit Group** [« Back to Groups](#)

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**Details**

Name \*

Comments

Organizational Group ☐ Check to allow this group to have process permissions.

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**Settings**

[Positions](#) [Incidents](#) [Boards](#) [Subscription Boards](#) [Plugins](#) [Links](#) [Menus](#) [Dashboards](#) [Maps](#)

[+ Add Position](#)

9 entries

☐ Name ^

5. Click the **Save** button.

# Users

From the control panel, users can access dashboards created by administrators and create a custom dashboard for the position they are assigned to.

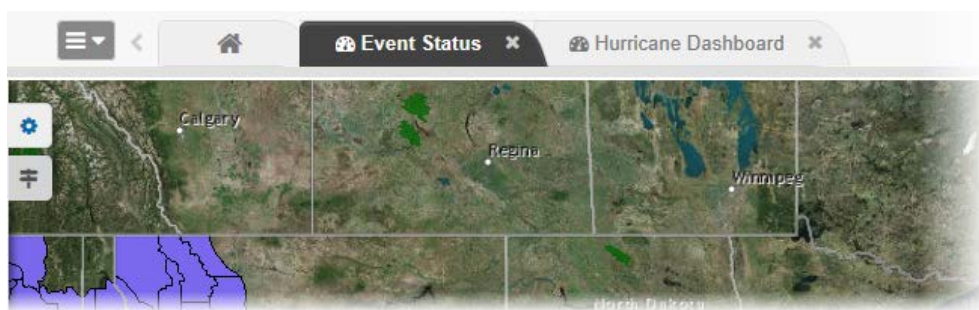
## Accessing Dashboards

Administrators can configure an unlimited number of dashboards for users to view. Each dashboard will be contained in a tab in the dashboard window.

Dashboards may open automatically after logging in or changing positions. This feature is determined by settings configured by your administrator.

To access administrator-configured dashboards:

1. On the control panel, click the **Dashboards** link in the *Tools* section.
2. Click the dashboards to open them.
3. In the *Dashboards* window, click the tabs to switch between dashboards. Board data is automatically refreshed when records are added or updated.



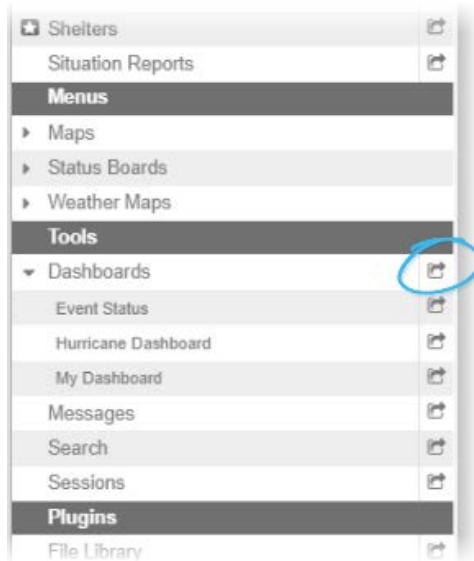
**Note:** Board paging automatically appears if the record limit for a view is reached. The number of records that appear in a list view is set in the input view for that board.

## Creating a Custom User Dashboard

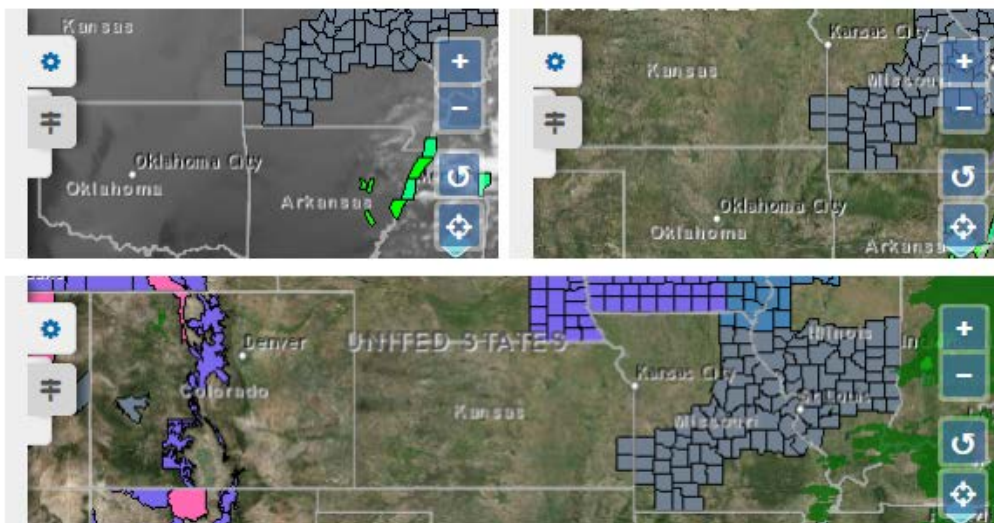
Users are only allowed to have one custom dashboard for every position they are assigned to. Dashboards may open automatically depending on settings configured by your administrator.

To create a custom user dashboard:

1. On the control panel, click the arrow on the right side of the **Dashboards** link in the *Tools* section.

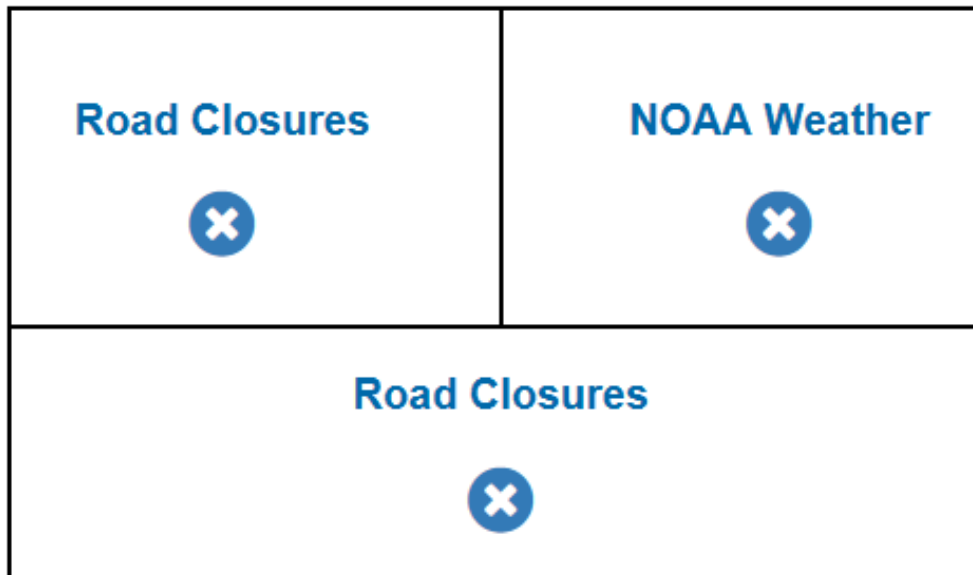


2. Click the gear icon in the top right corner.



3. In the *My Dashboard Configuration* window, select the number of boards you want in your dashboard.
4. Select a layout from the options provided.
5. Click the plus symbol to include a board in the applicable pane.
6. In the *Select Board* window, choose a board to include, and click the **Save** button.
7. Repeat these steps for the other panes.

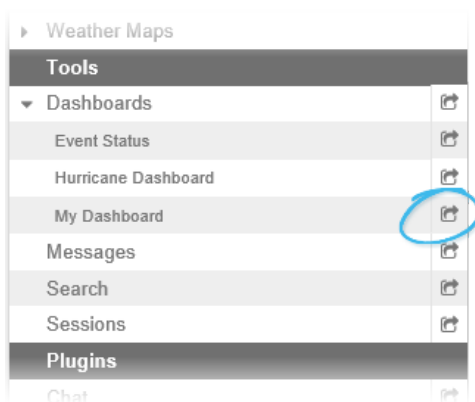
- Click the **Save** button to create the dashboard. Your custom dashboard is added to the dashboard window.



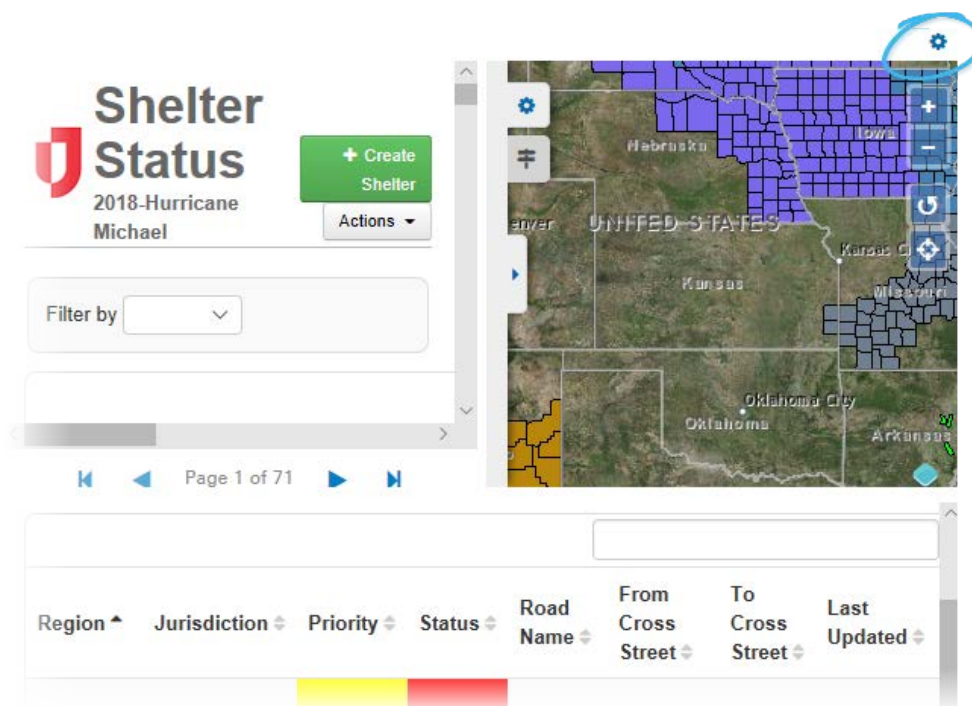
## Editing Your Custom Dashboard

To access your custom dashboard:

- On the control panel, click the arrow on the right side of the **My Dashboard** link in the *Tools* section.



2. In the *My Dashboard* window, click the edit icon.



3. In the *My Dashboard Configuration* window, you can change number of boards to display, the layout, and the boards that are assigned to the dashboard. Click the minus symbol to remove a board from the dashboard and click the plus symbol to add a different board to the dashboard.
4. Click the **Save** button to save your changes.

## Accessing Your Custom Dashboard

See the “Creating a Custom User Dashboard” topic in this chapter for instructions on adding a dashboard.

To access your custom dashboard:

1. On the control panel, click **Dashboards** in the *Tool* section.
2. Click **My Dashboard**.