

WebEOC® Fusion

Subscription Boards Guide

Version 2.1

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Introduction to Subscription Boards

WebEOC Fusion brings a new dimension to the concept of collaboration. With WebEOC Fusion, emergency managers can reach out not only to neighboring counties, but also to WebEOC users in other parts of the world in times of need. Fusion ultimately acts as the central communications hub to route messages.

In addition, Fusion enables dissimilar systems to interface securely and rapidly. It serves as a centralized data exchange switch that connects users to the tools that further enable them to stay aware of the increasing numbers of situations calling for instant and informed decisions. Users can easily share essential information with all WebEOC systems through status boards created from any of the connected WebEOC systems, creating a common operating picture for all users, regardless of location.

Configuration

WebEOC can be configured to allow regional installations to securely and reliably share information through WebEOC Fusion. A Fusion server encrypts and routes data from firewall-protected WebEOC servers to other subscribed WebEOC installations.

WebEOC instances that are all connected to a single Fusion server can see the subscription boards and regional incidents published by the other WebEOCs that are also connected to that Fusion server. It is also possible for any individual WebEOC to be connected to multiple WebEOC Fusion servers. However, subscription boards and regional incidents only exist on the server they were published on.

Important: WebEOC 7.0 or later is required for this process.

Preparing for Configuration

Before you configure WebEOC for Fusion, you must:

- 1. Install and run WebEOC 7.0 or later.
- 2. Install and configure a WebEOC Fusion server.
- 3. Have subscriber credentials (serial number and password) created for the WebEOC and obtain the URL of the Fusion instance.
- 4. Have a WebEOC user login with administrator privileges and multiple login capability. This login will be used by the subscription boards Pullservice adapter to insert messages from Fusion into WebEOC. The local administrator account must have DBO privileges in SQL Server®, or the user must be logged on with local administrator rights and SA privileges.

Configuring the WebEOC Connection

The WebEOC Fusion server URL and subscriber login credentials are provided by the WebEOC Fusion server administrator. Using these credentials, you can configure the WebEOC connection with Fusion by doing any of the following:

- Importing the Fusion URL directly within your WebEOC.
- Configuring the connection via the System tab within your WebEOC.
- Using the WebEOC Configuration Tool.

WebEOC instances can be subscribers on multiple Fusion servers. The following procedures detail the setup between one server and one client. You must repeat the steps in your chosen procedure for each WebEOC Fusion server a WebEOC subscribes to.

Note: Credentials differ for each Fusion server subscribed to this WebEOC.

To add a Fusion server to a WebEOC configuration via import

Note: Prior to starting this procedure, you must use the Quick Create feature in your instance of WebEOC Fusion to obtain the URL required for import. For instructions on using Quick Create to add a new subscriber, see the WebEOC Fusion 2.1 Administrator Guide.

- 1. Log in to your instance of WebEOC.
- 2. Open the Admin window and go to System: WebEOC Fusion. The WebEOC Fusion page opens.
- 3. In the upper right corner, click **Actions**.
- 4. From the drop-down list, select Import.



5. In the *Import URL* window, enter the appropriate Fusion server URL.



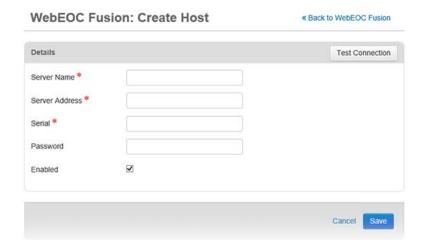
Note: The Fusion URL is created when you use the Quick Create feature in your Fusion instance. After you use Quick Create to add a subscriber, a one-time use URL is generated and appears in a window.

6. Click **Import**.

To add a Fusion server to a WebEOC configuration via the System tab

- 1. Log in to your instance of WebEOC.
- 2. Open the Admin window and go to System: WebEOC Fusion. The WebEOC Fusion page opens.

3. In the upper right corner, click Create Host. The WebEOC Fusion: Create Host page opens.



4. In the **Server Name** field, enter a name for the connection.

Note: We suggest this name be user-friendly and indicative of the region it serves (for example, Southeast Regional Server). This name appears when publishing subscription boards and on the display panels of users who use subscription boards.

- 5. In the **Server Address** field, enter the URL of the WebEOC Fusion server in the format http://www.Domain-Name/esiwebfusion.
- 6. In the **Serial** field, enter the serial number for your WebEOC that was generated by WebEOC Fusion and provided to you by the Fusion system administrator.

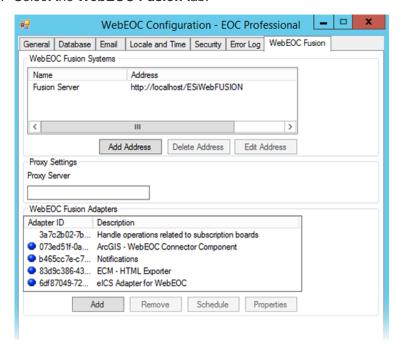
Note: The serial number is in the form of a hash (for example, a60446a2-5f75-4ca2-b562-450d0781641d).

- 7. In the **Password** field, enter the password for your WebEOC subscriber account as set by the Fusion server administrator.
- 8. Verify that the **Enabled** check box is selected.
- 9. In the upper right corner of the page, within the **Details** header, click **Test Connection**.
- 10. When the Connection Tested Successfully window opens, click OK.
- 11. Click Save.

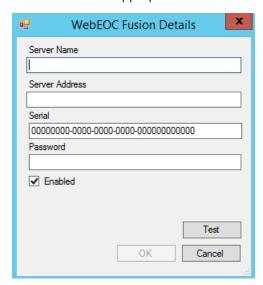
To add a Fusion server to a WebEOC configuration using the Configuration Tool

1. Log in to the Local Administrator account.

- Navigate to and launch the configuration tool. Go to: Start: All Programs: ESi Software: WebEOC
 Org Name: Configuration Tool.
- 3. Select the **WebEOC Fusion** tab.



- 4. Click Add Address.
- 5. In the *Details* window, enter the WebEOC Fusion server information and WebEOC subscriber credentials in the appropriate fields.



Note: These credentials (serial number and password) must be created by the Fusion server administrator, and only one WebEOC can use each set of credentials.

6. In the **Server Name** field, enter a name for the connection.

Note: We suggest this name be user-friendly and indicative of the region it serves (for example, Southeast Regional Server). This name appears when publishing subscription boards and on the display panels of users who use subscription boards.

- 7. Enter the URL of the WebEOC Fusion server in the format http://www.Domain-Name/esiwebfusion.
- 8. Enter the serial number for your WebEOC that was generated by WebEOC Fusion and provided to you by the Fusion system administrator.

Note: The serial number is in the form of a hash (for example, a60446a2-5f75-4ca2-b562-450d0781641d).

- 9. Enter the password for your WebEOC subscriber account as set by the Fusion server administrator.
- 10. In the Details window, click Test.

Important: Be sure "Enabled" is selected.

11. In the Connection Tested Successfully window, click OK.



12. In the *Details* window, click **OK**.

Note: After all WebEOC Fusion servers have been added to the Configuration Tool, click **Save** to save the configuration tool.

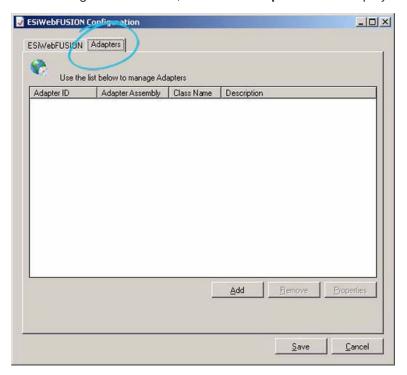
Configuring the Subscription Boards Adapter

To add the subscription board adapter to the WebEOC Fusion server

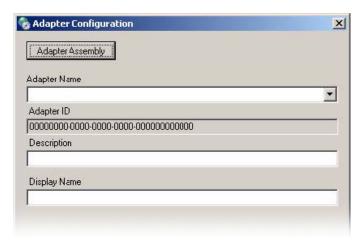
- 1. Log in to a Local System Administrator account.
- 2. Navigate to and launch the configuration tool. Go to: **Start**: **All Programs**: **ESi Software**:

ESiWebFUSION: Configuration Tool.





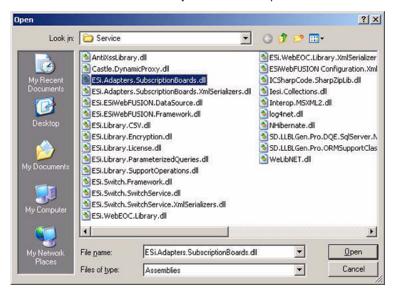
- 4. Click Add. The Adapter Configuration window opens.
- 5. In the Adapter Configuration window, click Adapter Assembly.



6. Navigate to the directory location specified during the initial installation.

Tip: If the default directory was specified, then browse to **Local Disk [C:]**: **Program Files**: **ESiWebFUSION**: **Service**.

7. Locate the file named **ESi.Adapters.SubscriptionBoards.dll**, and click **Open**. The adapter becomes a choice in the **Adapter Name** drop-down list in the *Adapter Configuration* window.



- 8. If necessary, select the adapter from the drop-down list.
- 9. Accept the default Adapter Name, Adapter ID, and Description.
- 10. Enter a name (e.g., Subscription Boards and Regional Incidents) in the Display Name field.

Note: This name appears on the WebEOC Fusion Administration page within the Services link

- 11. Click **OK**. The adapter is added to the list in the **Adapters** tab window.
- 12. Click **Save** to save the added adapter.

After the subscription board adapter has been set up, you can add subscribers (WebEOC servers) to the Fusion server through the WebEOC Fusion Admin Manager.

Administration

WebEOC Fusion employs two features in WebEOC 7 versions and later—subscription boards and regional incidents—that, when used together, enable users to easily share boards and incident data across the Fusion network.

Subscription boards are boards shared by two or more WebEOCs on a Fusion network, typically used in conjunction with regional incidents. A regional incident is also shared across the network with other WebEOCs. In order for data sharing to occur across the network, users must have access to the subscription boards from their WebEOC Control Panel and use a regional incident.

In WebEOC, users log in to a regional incident through a mapped local incident. This feature allows users to log in to a single incident that supports both local and regional data. Since regional incidents on separate WebEOC Fusion servers can be mapped to a single local incident, users can post local data to their local boards and regional data to the regional boards, even if they are on different Fusion servers.

Regional Incidents

Creating a Regional Incident

To create a regional incident

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the Admin window, click the **Incidents** tab, followed by the **Incidents** subtab.
- 4. On the *Active Incidents* page, click the **Actions** button and select **View Regional Incidents** from the drop-down list.



 On the Regional Incidents page, click Publish New Regional Incident. The Publish Regional Incident page opens.

Publish Regional Incident Details Name * Date 12/28/2015 06:11:41 Subscribers Host * Select Host... Automatically publish to future subscribers Mapping © Create Local Incident Use Local Incident No available incidents Upload local data

6. In the Details section, enter a name for the regional incident in the Name field.

Tip: The Date field automatically populates and is therefore read-only.

7. In the Subscribers section, select the host from the **Host** drop-down list.

Note: This is the Fusion server that you are publishing the regional incident to.

8. Once a host is selected, the **Add Subscriber** link becomes available. Click **Add Subscriber** and, in the *Add Subscriber* window, select the check box next to each subscriber you want to share this incident with.

Tip: You can select multiple subscribers. To include all subscribers, select the check box next to the **Name** column heading. If you have a long list of subscribers, use the **Filter** field to manage subscribers and find the appropriate ones you want to add.

- 9. Click Add.
- 10. Optionally, select the **Automatically publish to future subscribers** check box if you want to apply this feature.
- 11. In the *Mapping* section, select the **Create Local Incident** radio button to create the regional incident and its corresponding local incident.

- a. If you select the Create Local Incident radio button, the *Incidents: Edit Incident* page opens for the new local incident after you click Publish. This page allows you to assign groups to use the local incident.
- b. Click Add Group and select the check box next to each group you want added.

Tip: You can select multiple groups. To include all groups, select the check box next to the **Name** column heading. If you have a long list of groups, use the **Filter** field to manage groups and find the appropriate ones you want to add.

- c. Click Add.
- d. In the *Regional Incident Mapping* section, the regional incident that this local incident is mapped to appears.

Note: At a later time, you can remove the mapped connection by selecting the check box next to the regional incident and clicking **Remove**.

e. Click Save to save the local incident settings, or click Cancel to abort the operation.

Note: If you select the **Create Local Incident** option, the locally made incident is named exactly the same as the regional incident.

- 12. Alternatively, select the **Use Local Incident** radio button to map this regional incident to an existing local incident.
 - a. If you select **Use Local Incident**, you must also select the incident you want to map to from the drop-down list.



b. You must log in to the local incident in order to use the regional incident. If you want to upload the local data, select the **Upload local data** check box.

Note: If **Upload local data** is selected, only data associated with the selected local incident in the subscription boards for this host is uploaded. Uploaded data is only retrievable by WebEOC version 7.3 or later.

13. Click **Publish** to publish the regional incident, or click **Cancel** to abort the operation.

Subscribing to a Regional Incident

To subscribe to a regional incident

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the Admin window, click the **Incidents** tab, followed by the **Incidents** subtab.
- 4. On the *Active Incidents* page, click the **Actions** button and select **View Regional Incidents** from the drop-down list.



- 5. On the *Regional Incidents* page, click **Subscribe to Regional Incident** for the regional incident you want to subscribe to.
- 6. On the *Subscribe to Regional Incident* page, change the name of the incident in the **Name** field, if desired.

Note: This only changes the name on your WebEOC. The name of the newly created local incident may be changed through the Edit Incident window.

7. In the Mapping section, select the Create Local Incident radio button to create the regional incident and its corresponding local incident, or select the Use Local Incident radio button to map this regional incident to an existing local incident.

 a. If you select **Use Local Incident**, you must also select the incident you want to map to from the drop-down list.



b. You must log in to the local incident in order to use the regional incident. If you want to upload the local data, select the **Upload local data** check box.

Note: If **Upload local data** is selected, only data associated with this incident in the subscription boards for this host is uploaded. Data from local boards and subscription boards on other hosts is not uploaded. Additionally, uploaded data is only retrievable by WebEOC version 7.3 or later.

8. Select the **Download regional data** check box if you want to download the regional data.

Note: If you do not select this feature, you will only receive new regional data. You cannot see data that was posted before you subscribed.

9. Click Subscribe.

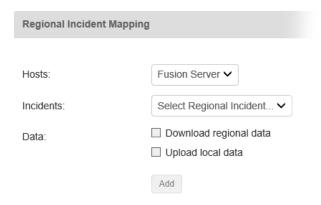
Escalating from a Local to Regional Incident

Before you escalate a local incident to a regional one, you must first create the regional incident to map to, or there must already be a regional incident published by another subscriber. See "Creating a Regional Incident" for instructions on creating a regional incident.

To escalate a local incident to a regional incident

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header
- 3. In the Admin window, click the Incidents tab, followed by the Incidents subtab.
- 4. On the Active Incidents page, select the incident you want to escalate to a regional incident.

5. On the *Incidents: Edit Incident* page, go to the *Regional Incident Mapping* section at the bottom of the page.



- 6. Select the host server from the **Hosts** drop-down list.
- 7. Select the regional incident you want to map this local incident to from the **Incidents** drop-down list.
- 8. Select the **Download regional data** check box if you want to download the regional data.
- 9. Alternatively, select the **Upload local data** check box if you want to upload your local incident data.
- 10. Click **Add** to map this local incident to the regional incident. The mapped regional incident appears with your configuration data.

Note: You can add one mapping to a regional incident per WebEOC Fusion host. If you are connected to multiple hosts, you may map to additional regional incidents, but a regional incident may be mapped to only one local incident.

11. Click **Save**, or click **Cancel** to abort the operation.

Note: The **Cancel** button does not undo the incident mapping. To undo the incident mapping, you must remove the mapping by selecting the incident and clicking the **Remove** button.

Subscription Boards

Publishing a Board

To publish a board as a subscription board

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the **Process** tab of the *Admin* window, click the **Boards** subtab.

- 4. On the Boards page, select the board you want to publish as a subscription board.
- 5. On the *Board: Edit Board* page, go to the *Tools* section and click **Publish Board**, located near the end of the page.



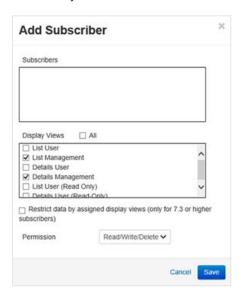
6. On the Publish Board: [Board Name] page, select the server from the drop-down list.

Note: If there is only one server connected, it is selected by default.

7. Select the subscriber you want to share this board with by clicking **Add Subscriber** in the *Subscribers* section.

Publish Board: After Action Review Server Name Fusion Server > Subscribers + Add Subscriber

8. In the *Display Views* section of the *Add Subscriber* window, select the **All** check box to send the subscriber all the display views associated with this board, or select the display view check boxes individually.



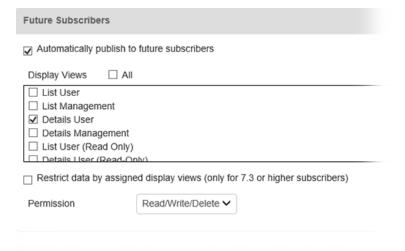
Note: If you select a display view that contains a view link, the linked display views are automatically selected as well. You can opt to deselect the linked views, but this should only be done if you are sure it will not cause errors in the board.

9. Select the Restrict data by assigned display views check box if you want to restrict the data.

Note: This restricts the subscriber's WebEOC to the data allowed by the assigned display's view filters, preventing the Reporter and the API from using data the subscriber's users cannot see.

Important: This feature requires that there are view filters turned on by default on all selected display views

- 10. In the **Permission** drop-down list, select the maximum permission you want to allow the subscriber for posting to this board.
- 11. Click Save.
- 12. *In the Future Subscribers* section, select the **Automatically publish to future subscribers** check box if you want future subscribers to have access to this board.



Note: If you select this feature, you must also configure the permissions for the display views. To do so, select the **All** check box to send future subscribers all the display views associated with this board, or select the display view check boxes individually.

- 13. Select the Restrict data by assigned display views check box if you want to restrict the data.
- 14. In the **Permission** drop-down list, select the maximum permission you want to allow the subscriber for posting to this board.

15. In the *Data* section, select the **Upload previous posts** check box if you want to upload the previous board data.



Important: Once a board is published, this option cannot be checked or unchecked. This means that, for all boards published from this WebEOC instance prior to its upgrade to WebEOC 7.3 or later, board posts cannot be uploaded to newly added WebEOC subscribers.

a. If newly added WebEOC subscribers must be able to get this board's data, follow the steps outlined in "Managing Changes."

Note: If this board is incident independent, then all board data is uploaded. If the board is not incident independent, only data that is currently mapped to a regional incident on the same Fusion server uploads by this feature. Uploaded data is only retrievable by WebEOC version 7.3 or later.

16. Click **Save** to save the subscription board settings, or click **Cancel** to abort the operation.

Managing Changes

If you need to make changes to a currently published board, you can make those changes on the fly and republish them with ease.

To manage changes to a subscription board

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the **Process** tab of the *Admin* window, click the **Boards** subtab.
- 4. On the Boards page, select your subscription board.
- 5. On the *Board: Edit Board* page, go to the *Tools* section and click **Publish Board**, located near the end of the page.



6. On the *Publish Board:* [Board Name] page, click **Save** to republish the board, or click **Cancel** to abort the operation.

Note: After a board is initially published, you can add or remove subscribers, but you cannot change its ability to upload previous posts. Republishing a board removes the republish alert.

Sending Existing Data to Newly Added Subscribers

In order to upload data to newly added subscribers, you must unpublish the board and republish it with the **Upload previous posts** check box selected. This is done on the *Publish Board* page.

Once you republish the board, you must re-map the local incident to the same existing regional incident, selecting the **Upload local data** check box. This is achieved using the *Edit Incident* page.

Viewing a Status as a Publisher

If you do not have WebEOC version 7.3 or later, you cannot access this feature. If your Fusion server is not at version 2.0 or later, you are unable to access to this feature.

To view a subscription board status as a publisher

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the **Maintenance** tab of the *Admin* window, click the **Service Log** subtab.
- 4. On the Boards page, select the appropriate subscription board.
- 5. On the Board: Edit Board page, click **Status** in the Publish subsection.



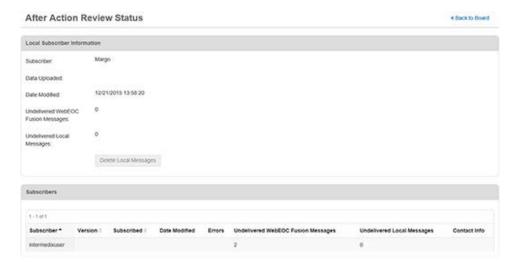
6. On the [Board] Status page, the Local Subscriber Information section shows all of your information as the publisher. The Subscribers section contains a table with subscriber details. For information about each column in the table, see the descriptions below.

Note: Status information is available for subscribers who are subscribed to the board. Information on subscribers using WebEOC versions earlier than 7.3 is not available or may be inaccurate.

Status Table Columns: Descriptions

Subscriber

The name of the subscriber. This column always populates regardless of the subscriber's version of WebEOC or whether it is subscribed to the board.



Version

The version of WebEOC used by the subscriber.

Subscribed

If the subscriber is subscribed to the board. Displays a red check mark if subscribed.

Note: The **Version** and **Subscribed** columns only populate for subscribers who have WebEOC 7.3 or later and have subscribed to the board.

Date Modified

The date the board was last modified or updated for the subscriber.

Note: All the dates should be the same. If a subscriber does not have the most current subscription board, the publisher should contact the subscriber or Customer Support.

Errors

Populates if subscribers have had issues subscribing to your board or receiving updates to the board structure.

Undelivered WebEOC Fusion Messages

The messages waiting on the WebEOC Fusion server for the subscriber.

Important: Contact Customer Support before deleting undelivered messages.

Undelivered Local Messages

Message for this subscription board that cannot be processed by the subscriber's WebEOC.

Important: Contact Customer Support before deleting undelivered messages.

Contact Info

The subscriber's contact information as entered for the subscriber on the Fusion server.

Viewing a Status as a Subscriber

If you do not have WebEOC version 7.3 or later, you cannot access this feature. If the publisher did not publish a board in WebEOC 7.3 or later, information may be missing. If your Fusion server is not at version 2.0 or later, you cannot access this feature.

To view a subscription board status as a subscriber

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the **Process** tab of the *Admin* window, click the **Boards** subtab.
- 4. On the *Boards* page, select the appropriate subscription board.
- 5. On the Board: Edit Board page, click **Status** in the Publish subsection.



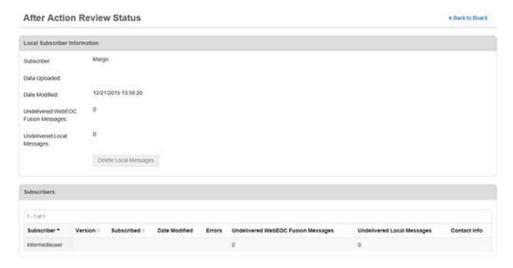
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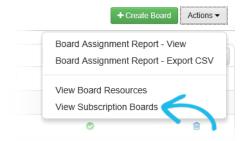
Contact Info

The subscriber's contact information as entered for the subscriber on the Fusion server.

Subscribing to a Subscription Board

To subscribe to a subscription board

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the **Process** tab of the *Admin* window, click the **Boards** subtab.
- On the Boards page, click the Actions button in the upper right corner and select View Subscription Boards from the drop-down list.



- 5. On the Subscription Boards page, click the subscribe icon next to the board you want to subscribe to.
- 6. When the confirmation window opens, click **OK**.
- 7. In the Subscribe to Board window, select the groups you want to have access to this board.
- 8. Optionally, in the **Label** field you can re-label the board.
- 9. Select the input view you want this group to have access to from the Input drop-down list.
- 10. Select the display view you want this group to have access to from the Display drop-down list.
- 11. Select the permission you want to allow this group to have from the **Permission** drop-down list
- 12. Select the **Download previous posts** check box if you want to download the available board data.

13. Click **Save** to save the subscription board settings, or click **Cancel** to abort the operation.

Managing Errors

To manage subscription board errors

- 1. Log in to your WebEOC.
- 2. Click the Admin icon in the header.
- 3. In the **Process** tab of the *Admin* window, click the **Boards** subtab.
- 4. On the *Boards* page, select the appropriate subscription board.
- 5. On the *Board: Edit Board* page, go to the *Tools* section and click **Board Editor**.



6. Select the error symbol to open the error detail pop-up window.

Tip: On the Board Editor page, hover over the error symbol to view a truncated error message.

7. If you are unable to resolve the errors, contact Customer Support.

Users

Subscription boards are boards shared between or among several WebEOCs over the Fusion network. A subscription board is published to the Fusion server and offered for use to connected WebEOCs.

WebEOCs that subscribe to the board can, depending on their level of permission, read, read/write, or read/write/delete information on the board. A record is added to a subscribing (local) WebEOC. The record moves from the local copy of the board to the server and is then added to each participating WebEOC.

Using Subscription Boards

In the control panel menu, subscription boards are grouped together and displayed in a separate, expandable/collapsible section (e.g., "State COGs") immediately after the group of standard boards. If your system is subscribing to multiple WebEOC Fusion servers, subscription boards are grouped and labeled per the server.

Subscription boards are used in the same way as any standard board on a user's WebEOC control panel: users can add/update, view, sort, and filter data as determined by the permissions allowed by the board owner and group permissions on the subscribing (local) WebEOC server.

The control panel menu shows a local incident mapped to a regional incident on a WebEOC Fusion server named *Documentation*.

Subscription boards are located in the *Boards [Server Name]* section under the local boards section. These boards function the same as local boards, except that data posted to these boards is pushed to other subscribers. Data posted by other subscribers is also pushed to your subscription boards.

Board Attachments

Files attached to records posted to a subscription board through a regional incident are passed across the Fusion hub to subscribers. Attachments can be downloaded or viewed directly from the board's display.

The maximum size of a board post with attachments is 4 MB. If the 4 MB limit is exceeded, an error displays and the record is sent with the attachments stripped from the entry.

Board Emails

Subscription board emails work the same as they do for local boards. You cannot set up emailing or control panel notifications on a subscriber's subscription board; this can only be accomplished on the publisher side.

Losing Connectivity to the Server

Should you lose connectivity to the WebEOC Fusion server, you can continue to add information to a subscription board. However, until connectivity is restored, new messages are not received from or relayed to other WebEOCs.

To indicate that WebEOC is not exchanging information with the Fusion server, an "Offline" warning appears next to the server name on the control panel. If this occurs, advise your WebEOC administrator of the situation.

You can still access the subscription boards locally, and you are able to add and view entries as needed. The information, however, is not relayed through the server to other subscribers until the connection is restored.

When the connection is restored, the "Offline" notification disappears from your control panel and your subscription boards automatically synchronize with the other subscribers' boards. All subscription board entries made while the connection was down are sent to all other WebEOCs in the region and the local WebEOC receives all posts from other subscribers. After synchronization, the subscribing WebEOCs once again have all entries for the subscription boards.

Regional Incidents

Regional incidents are created by an administrator on a WebEOC server connected to the Fusion network and offered for subscription to other member WebEOCs. The WebEOC administrator activates the regional incident on the local server, maps it to an existing or new local incident on your WebEOC, and assigns access permissions to authorized users.

Users log in to the local incident as directed by their WebEOC administrator in order to use a regional incident. In the control panel menu, the user can see the local incident and any mapped regional incidents next to the server name or names. Messages posted to local boards post under the local incidents, and messages posted or data linked to subscription boards seamlessly send under the mapped regional incident for that WebEOC Fusion server.