# WebEOC Nexus Board Building Worksheet

Before building a status board in WebEOC Nexus, you may want to gather requirements for the board and sketch a design of the layout on paper or a whiteboard. Use this worksheet to gather requirements for your board.

**Note**: You can build and edit your board in WebEOC Nexus or in [DesignStudio](https://docs.juvare.com/webeoc-onnexa/Documentation/Board%20Building%20Tips/Edit_Board_In_DesignStudio.htm). This worksheet contains links to steps performed in both products.

## General Requirements

What is the board’s name?

What’s the purpose of the board?

What type of board (standard, tasking, resource tracking, and so forth) am I creating?

|  |  |
| --- | --- |
| **Requirement** | **Yes/No** |
| Is an Input view required?  An Input view allows users to enter data.  You can build it in [WebEOC Nexus](https://docs.juvare.com/webeoc-onnexa/Documentation/Boards/Create_And_Edit_Input_Views.htm) or [DesignStudio](https://docs.juvare.com/designstudio/Documentation/Boards/Create_An_Input_View.htm). |  |
| Is a Delete view required?  A Delete view is a type of Input view that contains a confirmation message that allows users to delete a record.  You can build it in [WebEOC Nexus](https://docs.juvare.com/webeoc-onnexa/Documentation/Boards/Create_And_Edit_Input_Views.htm) or [DesignStudio](https://docs.juvare.com/designstudio/Documentation/Boards/Create_A_Delete_View.htm). |  |
| Is a Details View required?  A Details view is a type of Display view that displays the individual record details in a separate window.  You can build it in [WebEOC Nexus](https://docs.juvare.com/webeoc-onnexa/Documentation/Boards/Create_And_Edit_Display_Views.htm) or [DesignStudio](https://docs.juvare.com/designstudio/Documentation/Boards/Create_A_Details_View.htm). |  |
| Is a List View required?  A List view is a type of Display view that displays all the board’s records, depending on a user’s permission and filters.  You can build it in [WebEOC Nexus](https://docs.juvare.com/webeoc-onnexa/Documentation/Boards/Create_And_Edit_Display_Views.htm) or [DesignStudio](https://docs.juvare.com/designstudio/Documentation/Boards/Create_A_List_View.htm). |  |
| Is a [Dashboard view](https://docs.juvare.com/webeoc-onnexa/Documentation/Dashboards/About_Dashboards.htm) required?  A Dashboard view allows users to view multiple boards and maps at one time.  You can build it from [WebEOC Nexus](https://docs.juvare.com/webeoc-onnexa/Documentation/Dashboards/About_Dashboards.htm) or [DesignStudio Pro](https://docs.juvare.com/designstudio/Documentation/Boards/Create_Dashboard_View.htm). |  |
| Should board users be able to [print any of the views to PDFs](https://docs.juvare.com/webeoc-onnexa/Documentation/HTML%20Conventions/Tags_PDFLink.htm?Highlight=pdflink)?  If Yes, list the views here. |  |

## Input View Requirements

Consider these requirements for each Input view if multiple Input views must be built for the board.

### Field Requirements

What fields will be needed to capture data on the Input view? Copy and paste this table to define each field.

|  |  |
| --- | --- |
| What is the field’s name? |  |
| What is the field’s label? |  |
| Is the field required? | Yes/No |
| What type of field is it, text, textarea, checkbox, radio option, or dropdown list?  **Note**: In DesignStudio, you can build a board using components that automate the creation of fields of many types, such as address, date and time, phone, and more. See [Board Components List](https://docs.juvare.com/designstudio/Documentation/Boards/Board_Components_List.htm) for details. |  |
| For dropdown lists, does the list exist in WebEOC Nexus?  If not, you must [create it](https://docs.juvare.com/webeoc-onnexa/Documentation/Lists/Create-A-List.htm). | Yes/No |
| For dropdown lists, if you must create the list, what options must be available in the list? |  |
| For [radio options](https://docs.juvare.com/designstudio/Documentation/Boards/Component_Radio.htm), what options must be available for selection? |  |
| Is the field a [header](https://docs.juvare.com/designstudio/Documentation/Boards/Component_Header.htm) to help organize the layout? | Yes/No |
| Should the field be [conditionally hidden](https://docs.juvare.com/designstudio/Documentation/Boards/Add_A_Conditional_Component.htm)? | Yes/No |
| If the field should be hidden by a condition, what field and value must be set? | |
| Field | Value |
|  |  |

### Other Input View Requirements

|  |  |
| --- | --- |
| **Requirement** | **Yes/No** |
| Will information posted to this board be [data-linked](https://docs.juvare.com/webeoc-onnexa/Documentation/Boards/Data-Linking.htm) to other boards?  If so, which fields will be linked and to which boards and fields will this data be linked? |  |
| Should a [child table](https://docs.juvare.com/designstudio/Documentation/Boards/Create_Child_Input_View.htm) be used in this view? |  |
| Should the view include a [map](https://docs.juvare.com/webeoc-onnexa/Documentation/Mapping/Mapping%20Manager/Enable-Boards-To-Use-Maps.htm)? |  |
| Will user editing privileges be restricted in this view?  **Note**: See Board Access and Permissions below for more information. |  |
| Will the Input view be Add Only?  If all entries, including updates, are to be displayed on the status board, select the **Add Only** checkbox for the Input view in the Board Editor. If the **Add Only** checkbox is not selected, only the last update for a record displays on the status board. Regardless of this selection, all record entries for an incident are recorded in the database, including any updates. |  |
| Will the Input view use the Lock User Input setting?  To set the data entry display to one record entry for the specified status board per user, select the **Lock User Input** checkbox for the Input view in the Board Editor. Subsequent entries made by the user are entered as updates through the Input view for the board and only the last record entry appears. |  |
| Will the Input view use the Lock Position Input setting?  To set the data entry display to one record entry for the specified status board per position, select the **Lock Position Input** checkbox for the Input view in the Board Editor. Subsequent entries made by the position are entered as updates through the board's Input view and only the last record entry appears. |  |
| Will the Input view be assignable?  To define whether a view can be assigned to a group, select the **Assignable** checkbox for the Input view in the Board Editor. By default, a board's view is not assignable. When selected, the view can be assigned in the Groups Manager. This is particularly useful when sharing boards (via import/export or WebEOC Fusion). To disable the view so that it cannot be assigned, clear the checkbox. |  |

## Details View Requirements

### Field Requirements

What fields from the Input view must be displayed on the Details view?

Copy and paste the tables from the Input View Field Requirements to define each field in the Details view.

### Other Details View Requirements

|  |  |
| --- | --- |
| **Requirement** | **Yes/No** |
| Will user editing and/or viewing privileges be restricted in this view?  **Note**: See Board Access and Permissions below to complete this information. |  |
| Should fields be [conditionally hidden](https://docs.juvare.com/designstudio/Documentation/Boards/Add_A_Conditional_Component.htm) on this view? |  |
| Should a [child table](https://docs.juvare.com/designstudio/Documentation/Boards/Create_Child_Input_View.htm) be associated with this view? |  |
| Should the view include a [map](https://docs.juvare.com/webeoc-onnexa/Documentation/Mapping/Mapping%20Manager/Enable-Boards-To-Use-Maps.htm)? |  |

## List View Requirements

If multiple List views are required, consider these requirements for each List view.

### Field Requirements

What fields from the Input view must display on the List view?

|  |  |  |  |
| --- | --- | --- | --- |
| **Field name** | **Column Header** | [**Filter pill?**](https://docs.juvare.com/designstudio/Documentation/Boards/Component_Filter_Pill.htm) | **Visible on Mobile?** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Other List View Requirements

|  |  |
| --- | --- |
| **Requirement** | **Yes/No** |
| Should a [text search or range search](https://docs.juvare.com/designstudio/Documentation/Boards/Add_A_Filter_or_Search_Button_to_a_List_View.htm) be added to this view? |  |
| Should [expression cards](https://docs.juvare.com/designstudio/Documentation/Boards/Component_Card.htm) be created for this view? |  |
| Will user editing privileges be restricted in this view?  **Note**: See Board Access and Permissions below for more information. |  |
| Will View filters be helpful with viewing restrictions?  You can build them in [WebEOC Nexus](https://docs.juvare.com/webeoc-onnexa/Documentation/Boards/Board_Filters.htm) or [DesignStudio](https://docs.juvare.com/designstudio/Documentation/Boards/Build_a_View_Filter_For_a_Display_View.htm). |  |
| Should the view filter be set on a visible or hidden field? |  |

If you will use View filters, which field, operator, and value will be used for the filters?

|  |  |  |
| --- | --- | --- |
| **Field** | **Operator** | **Value** |
|  |  |  |
|  |  |  |
|  |  |  |

## Dashboard View Requirements

* Which [boards](https://docs.juvare.com/webeoc-onnexa/Documentation/Dashboards/Create-A-Dashboard-View.htm) should be included in a Dashboard view?
* Should a [map](https://docs.juvare.com/webeoc-onnexa/Documentation/Dashboards/Create-A-Dashboard-View.htm) be included in the Dashboard view?

## Board Access and Permissions

What types of permission (Admin, Read-only, etc) should be created for this board?

|  |
| --- |
| Board Permission Names |
|  |

Which [positions](https://docs.juvare.com/webeoc-onnexa/Documentation/Positions/Create-A-Position.htm) need access to this board?

|  |
| --- |
| Positions |
|  |

Which [feature groups](https://docs.juvare.com/webeoc-onnexa/Documentation/Groups/Plan_And_Create_A_Feature_Group.htm) must be created, with which positions assigned, with which combination of Input and Display views and Board Permission tags?

|  |  |  |  |
| --- | --- | --- | --- |
| Feature Group | Positions | Input and Display Views | Board Permission Tags |
|  |  |  |  |

After requirements for the board have been identified, you should be ready to begin building the board.