Working with the Incident List Feature

The Incident List feature is a new view allowing you to search, view and filter your incident forms to find the ones you are looking for. The Incident List provides several additional tools for finding incidents, as well as a faster load time.

Overview of Incident List Options

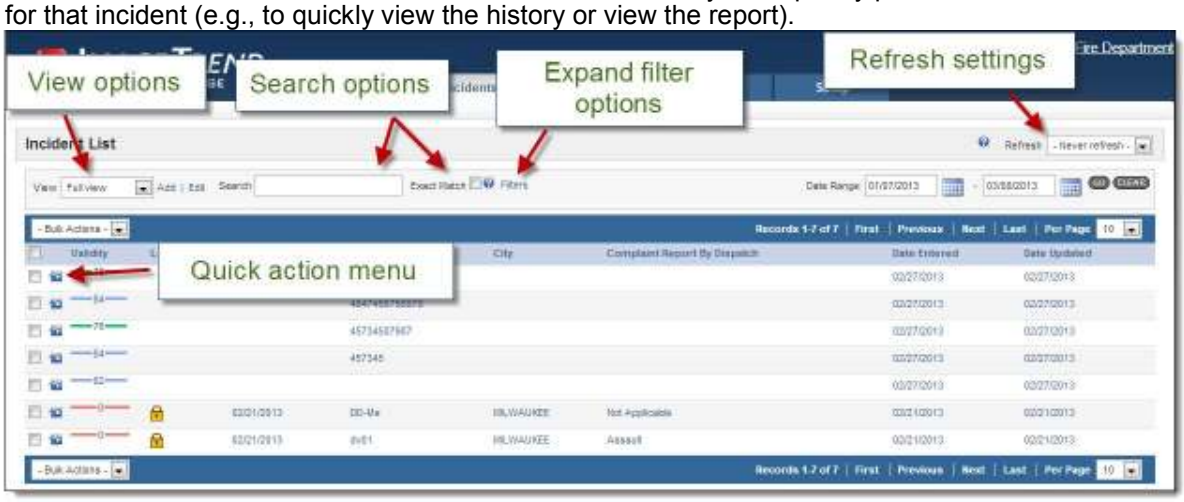
The Incident List page provides you with a collection of tools you can use to find the appropriate incident(s) in your system.

Views allow you to create a set of criteria that incidents must meet in order to be displayed when that view is applied and also to customize which columns you see. You can save a view and use it again any time that you view the incident list.

The **search options** allow you to either search for an incident exactly matching everything you type in the search box (when the *Exact Match* checkbox is selected) or for any incidents that contain what you typed in the *Search* box, even if they also contain additional information (e.g., if you type “”Lake,” you could see results for Lakeville and Lake City). The **filters** options allow you to enter more specific search criteria.

You also have the option to select how often the page will refresh to display new incidents meeting your view and search criteria.

The **Quick Action menu** available for each incident allows you to quickly perform an action for that incident (e.g., to quickly view the history or view the report).

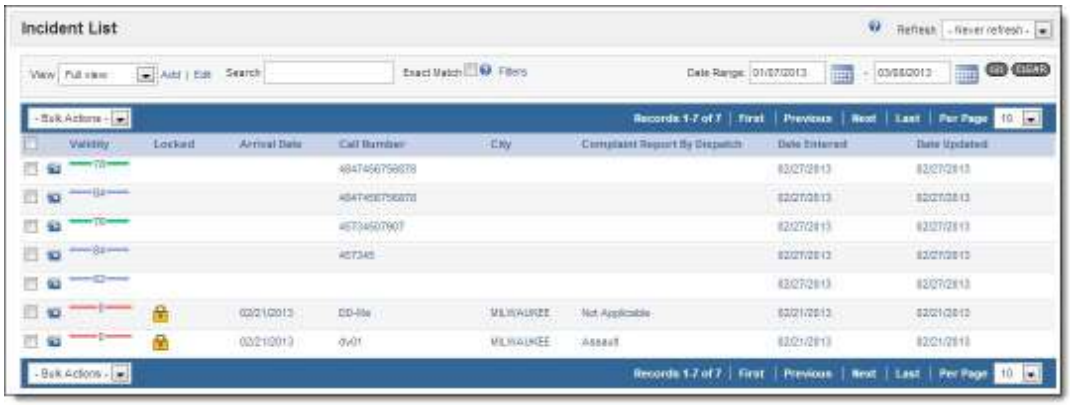


Searching for Incidents from the Incident List

In order to search for incidents, you can use any of the tools available from the *Incident List* page.

1. If necessary, in the upper right, click *My Service* or *My Fire Department.* The home page for your agency appears.

2. Under the *Incidents* tab, select *Incident List.*
   The *Incident List* page appears.



3. To apply a view to determine which incidents appear, from the *View* drop down menu, select the appropriate view.

   NOTE: The *Default View* option will provide the same view options as the default view of the *Run History* page did previously.

   The page refreshes to display the information set up in that view.
4. To perform a basic search,
   a. In the *Search* text box, type your search terms.

      HINT: The *Search* text box will search different options based on the columns that are displayed for the view you are using. For more information about which columns will be searched, click the *Help* icon to the right of the *Search* text box.

   b. To set the search up to return only incidents that match your entire entry in the search text box (e.g., entering *Lake City* would return only incidents with *Lake City,* not incidents with *Lakeville* or *Lake of the Woods,* because it is searching only for values that include the full text of *Lake City*), select the *Exact Match* checkbox.

      OR

      To set the search up to return incidents that include your search terms (e.g., entering *Lake City* would return *Lake City, Lakeville* and *Lake of the Woods,* because it is searching for either *Lake* OR *City*), deselect the *Exact Match* checkbox.

      NOTE: This *Exact Search* option applies only to the *Search* text box, not to the filters or additional search options covered in later steps.
   c. Click *Go.*

      The page is narrowed down to display only incidents matching your search.
5. To search based on date,

a. In the *Date Range* text boxes, type the first and the last date you want to view incidents within.

OR

To select the date from a calendar, click the *Calendar* icon and select the desired date.

OR

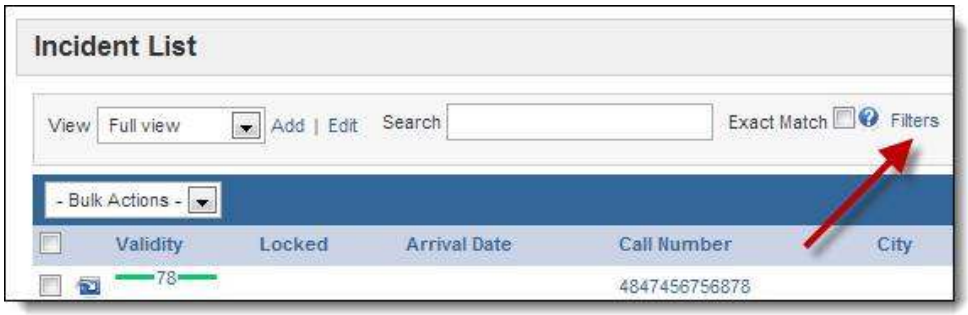
To avoid setting a start or end date for the search, leave the corresponding text box blank.

b. Click *Go.*

NOTE: If you have also entered other search criteria, you will see only incidents that match both those search criteria and the date criteria set here.

6. To perform an advanced search,

a. From the right of the *Search* text box, click the *Filters* link.



Additional search filters are displayed.

b. Enter any search criteria in the new search fields.

NOTE: Some filters have drop down menus that allow you to select how you want your search terms to match the criteria you enter; for example, you could say that you want the incidents with validity scores less than, greater than or equal to a certain number. If there is not a drop down menu to select this kind of information, the search will automatically look for values that contain the full text of your entry. So, searching for *12345* would bring back *12345, 012345* and *123456,* but not *123 45* or *123645.*

c. When finished, click *Go.*

NOTE: If you have also entered other search criteria, you will see only incidents that match both those search criteria and the advanced search criteria set here.

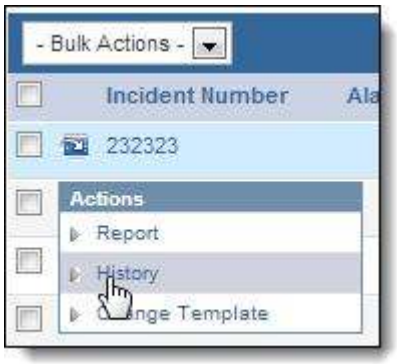
7. **OPTIONAL:** At any time, to clear your existing search and return to the default view, click *Clear.*
8. To open an incident, click on any of the blue links for that incident.
9. To view a report for an incident,

a. Click the *Quick Actions* icon for the report. A drop down menu appears.
b. Click *Report.*

If prompted, enter a reason for viewing the report and click *Submit.*

The report appears.

10. To view the audit trail history of this report,
    a. Click the *Quick Actions* icon for the report. A drop down menu appears.
    b. Click *History.*

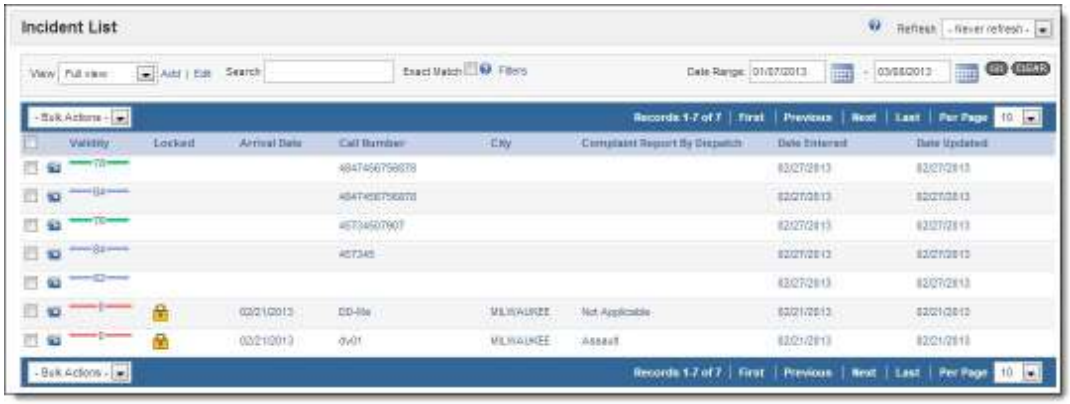


The *Incident History* window appears.

Setting the Refresh Frequency

You can select how often you want the *Incident List* page to automatically refresh to find new incidents.

1. If necessary, in the upper right, click *My Service* or *My Fire Department.* The home page for your agency appears.
2. Under the *Incidents* tab, select *Incident List.*
   The *Incident List* page appears.



3. From the upper right, from the *Refresh* drop down menu, select how often you want the page to automatically refresh.

Creating a View

Views allow you to create a set of criteria that incidents must meet in order to be displayed when that view is applied and also to customize which columns you see. You can create and save your own custom views that you can apply at any time when you're working with the incident list.

There are four different types of views: system views, service views, my views and the default view. Your ability to create and edit views is based on permissions. Users will only be able to create and edit views if they have the correct level of access to the *Incident List* page, and may be able to view only certain types of views based on their permissions.

System views are set up at the system level and only system administrators will be able to edit them, although everyone can view them.

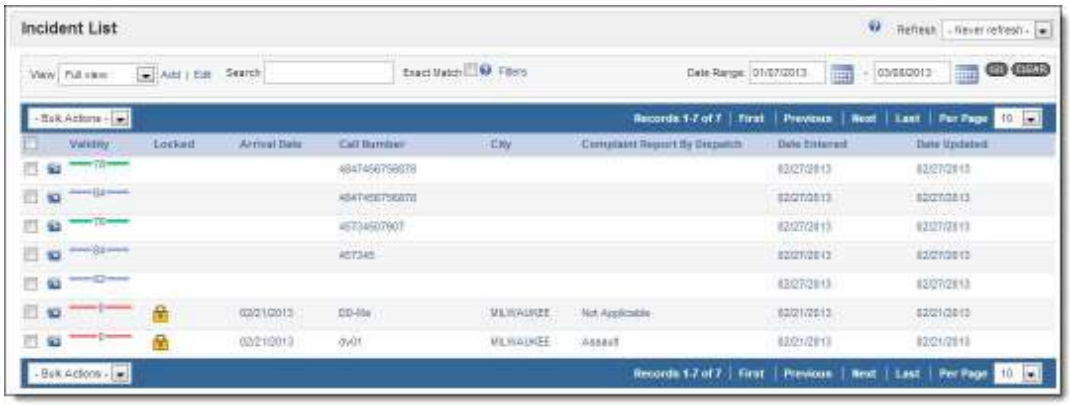
Service views are set up for a specific service by service administrators. Only service administrators will be able to edit these views, although anyone in that service can view them.

My views are created by you and can be edited by you at any time. Only you will be able to use and edit your views.

The **default** view includes all the columns that were included in the default view for the previous *Run History* page. You will not be able to edit this view, although you can use it to view the incident list at any time.

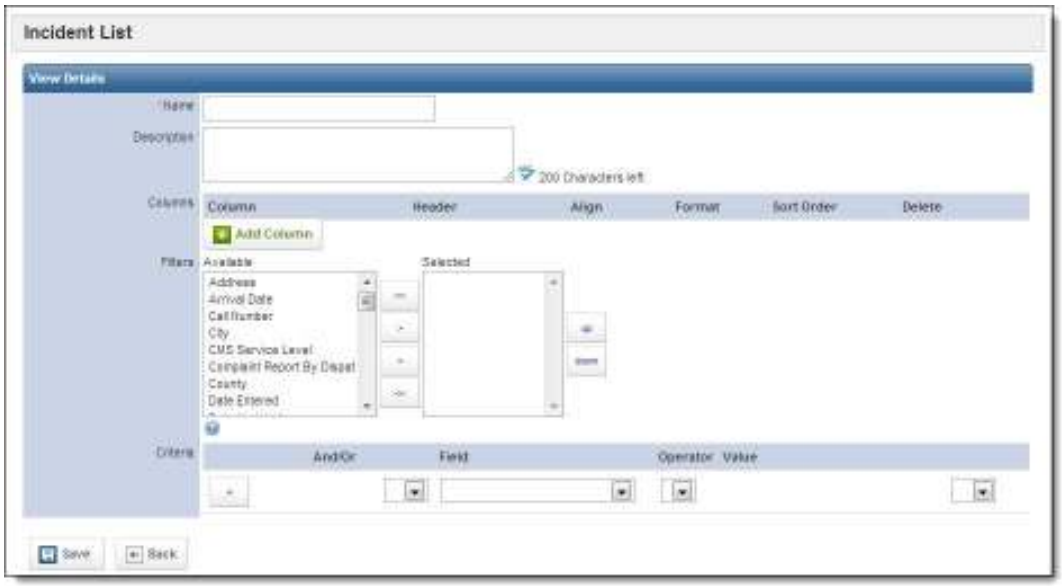
1. If necessary, in the upper right, click *My Service* or *My Fire Department.* The home page for your agency appears.

2. Under the *Incidents* tab, select *Incident List.*
   The *Incident List* page appears.



3. From the right side of the *View* drop down menu, click *Add.*

   The *View Details* page appears.



4. In the *Name* text box, type the name for this view.

   NOTE: This name is what you will see and select from the *View* drop down menu when you want to use this view again.

5. In the *Description* text box, type any additional descriptive details you want to save with this view.

   NOTE: This description will only be visible if someone opens this view for editing.

6. To set up an additional column of information to display on the incident list,
   a. Click *Add Column.*
      A new line appears.

   b. From the *Column* drop down menu, select the field that you want to appear for this column.
   c. **OPTIONAL:** To change the text that will appear in the column header, in the *Header* text box, type the desired header.
   d. From the *Align* drop down menu, select the way you want the text in this column aligned.
   e. If you want to change the formatting for the way the information appears, from the *Format* drop down menu, select the desired formatting.

      HINT: This option will not be available for all columns. It will most commonly be used for dates; you could choose to display the date as 3/21/2013 or March 21, 2013.
   f. If you have multiple columns, to move this one up or down in the order of where it will appear on the page, click the *Up* or *Down* button, as needed.

      HINT: If you drag the column to a new position, make sure that you do not click within a field; clicking within a field will open that field for editing rather than selecting the field to move.

      OR

      Click within the row for a column and drag it to the desired position in the list.
7. To add additional filters to the page that you can use for advanced searches,
   a. In the *Filters* section, from the *Available* scroll list, select the first filter to add.
   b. Click the *Add* icon .
   c. Repeat steps a–b until all desired filters are added.
8. To set up criteria that will narrow down the incidents listed on this page, in the *Criteria* section,
   a. To group multiple pieces of criteria, from the first drop down menu, select the opening parenthesis.

      HINTS:

      You generally only need to use parentheses if you will be creating multiple criteria where some are linked together with *And* (e.g., criteria A AND criteria B must be met) and others are linked together with *Or* (e.g., criteria C OR criteria D must be met).

      It may be easier for you to add parentheses at the end, once you have set up all your criteria already.

      If you want to enter multiple criteria, think of them like a math equation. Criteria will be applied in order unless parentheses are applied to group some of them together.
   b. From the *Field* drop down menu, select which field the criteria will be examining (e.g., *Status*).
   c. From the *Operator* drop down menu, select what is required of the selected value for the criteria to be met (e.g., *is, is before, begins with*).

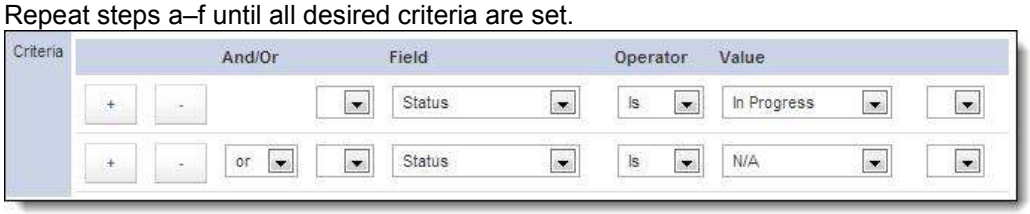
d. From the *Value* drop down menu, select the option that the field should be compared against (e.g., *In Progress*).
The first criteria is complete.

e. To add an additional piece of criteria, click the *Add* icon .

f. To determine how this piece of criteria relates to the others, from the *And/Or* drop down menu, select *And* (i.e., this all pieces of criteria must be met for a record to display) or *Or* (i.e., one of the pieces of criteria must be met for a record to display).

NOTE: If using parenthesis to group criteria, note that the *And* and *Or* options will only be applied within the parentheses. If the option is applied to a single piece of criteria outside a group, it will act upon the individual piece of criteria and the group as a whole.

g. Repeat steps a–f until all desired criteria are set.



h. When finished with a group, from the last drop down menu, select the closed parenthesis.

9. When finished with all criteria, click *Save.*
The *Create View For* window appears.

10. From the drop down menu, select the type of view you are creating.

NOTE: Depending on your permissions, you may not be able to create all these types of views.

System Views

System views are available for all services in the system and can only be created or edited by individuals with system administrator-level permissions. All other users will be able to apply system views when looking at the incident list but will not be able to make any changes.

Service Views

Service views are available for the service the view is created in and can only be created or edited by individuals with service administrator-level permissions. All other users will be able to apply service views when looking at the incident list for that service but will not be able to make any changes.

My View

A view that is saved as a My View will be available only for you. You can use this kind of view to view the incident and you will be able to edit it at any time, but no one else will be able to access it.

11. Click *Save.*
The new view is created.

Keyboard Shortcuts for the Incident List

Keyboard shortcuts allow you to quickly perform an action within the incident list by pressing certain keys on your keyboard.

Keyboard Shortcut	Action
Enter	Refreshes the page and keeps your current search and filter options applied
Esc	Refreshes the page and clears any current search and filter options
→ (right arrow)	Opens the next page of results on the incident list
← (left arrow)	Opens the previous page of results on the incident list