



Onboarding Request Quick Reference Guide

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1. Common Controls

This section of the manual will review the common tools and functions that application uses system-wide. Sorts, Filters, Searches as well as common add, edit, save functionality is covered in this section.



ADD:  or 

In most cases, you will click the Add button on a detail screen to enter new data to a table. Some fields will instantly be illuminated with a red box to show you what fields are required. Any field that does not have a red box around it is not required.

SAVE: 

After adding or editing records, select the Save button to commit the changes. This button will be active  (shown is darker color) when you are able to save the record. All required and validated fields must be populated with the correct information for Save to be active.

CANCEL / CANCEL ALL:  and 

When modifying or adding data, you may feel you've entered data incorrectly or are on the wrong record or need to "undo" what you've begun to do. If you wish to cancel the last change you made (BEFORE A SAVE) on a single record, you will click the CANCEL button. If you have edited multiple records/rows in a list and wish to cancel changes on all rows, select the CANCEL ALL button.

FILTER: 

Each user will have the ability to build their own default filters. The Filter button will allow you to name the filter you wish to have and select the field or fields that you wish to include with the data you wish to filter for. You can also set any filter as your default.

When you click the filter button, you will then click **Config** to build a new filter. In the above example, you can see that you'll click **New**, give the filter a name, select the field you wish to filter against (in this example Category, select an operator (Equal, Not Equal, Less Than, Greater Than, Less Than or Equal To, Greater Than or Equal To, Contains, Starts With, Ends With). You can then enter value to check for. In this case "Mobile Radio". You may then check whether the filter is default or leave it unchecked. If you click **Save**, the system will save the new filter you named to your list of filters for that page. Each user can have as many filters as they wish. If you don't wish to save the filter, simply click apply and the filter will run and the data will be displayed pertaining to the filter you built that you didn't save. You don't have to save a filter.

If you have a new filter you want to build from another filter, you can pull up the filter you want as your base filter and click **Save As** and change the name of the filter and you'll have a new filter. You can click Delete to delete the template you wish to delete.

When you go back to your **List View** page and click **Filter**, you should see the filters you've built for yourself. If you wish to edit a filter, you can click the pencil to edit the specific filter. If there is a filter applied, the filter button will be green.

SORT:

Each user will be able to create their own sorts. By clicking the Sort button and then Config, you will be able to click New and enter a new sort name, select the field or fields you want to use as your primary and/or secondary sorts, click Add Field to add that field to the list and then Save. If you wish to have that particular sort as your default sort, click the Default Sort button before Save. As with Filters, you don't have to save the sort. You can simply click Apply and the system will go to the list view and apply your sort. Also, if there is a sort applied, the sort button will be green.

ATTACHMENTS:

If you have permission, you will be able to attach files (attachments) to individual records within any module. If you see the Attachment button, you will click it and click the Choose Files button. This will allow you to select any file you wish to attach to the specific record you're on.

Once you select the file, it will attach it to the record. If you wish to delete an attachment, you must have permission to do so and you may click the X next to the file to remove it. If you wish to download the attachment and have permission to do so, you can simply click the file and it will download it to your Downloads folder on your workstation. You must have permission to be able to download.

EDIT LAYOUT: 

Layout design is the ability to change List View layouts of data fields. You can edit the layout of every page within any application.

The edit layout button is on the List view of every page that has Lists. Your initial layout may or may not have all of the fields you wish to see or have them in the order you would like to see them.

Transaction #	Agency Name	Sub Agency Name	Contact Name	Contact Phone
100145	Genesee County Medical Control Authority	25-059-01 GENESEE-CO-MCA	Jon C	2059999999
100144	DRUG ENFORCEMENT AGENCY UNDER DOJ	33-043-01 DEA-DOJ	Jon C	2059999999
100143	DRUG ENFORCEMENT AGENCY UNDER DOJ	33-043-01 DEA-DOJ	JC	0000000000
100142	Genesee County Medical Control Authority	25-059-01 GENESEE-CO-MCA	Jon Campbell	2056558949
100141	DRUG ENFORCEMENT AGENCY UNDER DOJ	33-043-01 DEA-DOJ	Jon Campbell, XXIV	2056558949
100140	Otsego County Sheriff Department	69-011-01 OTSEGO-CO-SD	Jon Campbell	2056558949
100139	Otsego County Sheriff Department	69-011-01 OTSEGO-CO-SD	Jon Campbell	2056558949
100138	Genesee County Medical Control Authority	25-059-01 GENESEE-CO-MCA	JonC	2058071502

When you click the edit layout, you'll be able to add the fields from the list on the left to the list on the right. The list on the right are the fields currently in that List view. You can rearrange the order of the fields in your list by clicking the arrow of the field you want to move and then clicking the field that you want to insert it into.

Layout Designer

Layout: Delete New Save Close

Edit	remove	field	rearrange
Adding a filter will automatically set the default filter.	⊗	Transaction #	▶
Field: <input type="text"/> Add Field	⊗	Agency Name	▶
Filter: <input type="text"/>	⊗	Sub Agency Name	▶
Sort: <input type="text"/>	⊗	Contact Name	▶
	⊗	Contact Phone	▶
	⊗	Contact Email	▶
	⊗	Request Type	▶
	⊗	Status	▶
	⊗	Comments	▶
	⊗	Create Date/Time	▶
	⊗	Created By User	▶
	⊗	Submission Date	▶
	⊗	Radio Count	▶
	⊗	Data Enabled	▶

Once you've added the fields you want in your list and arranged them in the order you want them, you can click Save. If you wish to save a new layout and have it available to you, simply change the name of the layout from Default or whatever it was to whatever you would like to save it to and click Save. When you go back to Lists view, you will have the new layout available to you.

Within the List view, you also can sort the data list by any of the columns in your layout. You will click the arrow to the left of the field label at the top. If the arrow is up, it will be sorted in ascending order. If the arrow is down, that field is sorted in descending order. If you need to widen a column, you can move your cursor the right of the title bar for the field you need widened and drag it to the right. *(Depending on the field type, you may not be able to narrow the columns to a certain point.)*



PAGINATION:

Most pages have pagination. This will allow the user to page thru data and/or enter the page number they wish to go to directly.



EXPORT:

Every List view will allow you to export data. Whatever fields are present in the List view you see is what will be exported. You can export to Excel or CSV file.

By clicking the Export button, you will be able to select the filename you would like to create and what format. The file will be exported to your Downloads folder and you should see the file in your lower left portion of your screen.

A dialog box with a light gray background and a dark border. At the top left, the text 'File Name' is displayed in blue. Below it is a white text input field. At the bottom of the dialog, there are three dark blue buttons with white text: 'Export to Excel', 'Export to CSV', and 'Close'.

QUICK SEARCH:



Every List View and Detail View page has a Search... box in the upper righthand corner of the page.

This search box will allow the user to enter information into this box and click the magnifying glass to search the table you're in for that information. In the specific table you are searching, certain fields are pre-defined in the search criteria. This function performs wildcard search of these fields.

There are some additional options available that are more specific to the Radio lists as follows:



Remove from List – This removes the selected record from the list.



Duplicate – This will duplicate the select record in the list. It inserts a new row that is an exact copy of the record you had selected to duplicate.

2. Request Types and Workflow

In this section, we will cover each Request Type in detail and the associated steps that are required.

2.1. Add Radios with New Template and Add Radios with Existing Template (Duplicate)

- Step 1 - Select **Add New Request** to create a new record with Type = "Add Radios with New Template" or "Add Radios with Existing Template (Duplicate)".
- Step 2 - **Save** the new request record. Status will default to "New Request".
- Step 3 - On the **Add New Radios** tab, select the **Add** button to insert a new row into the list.
- Step 4 - Fill in the fields as desired. Here are some specifics about Adding new radios:
 - Serial # must match the designated format for the Model family selected.
 - Flashcode or ESN will be required based on the Model family selected
 - For Add Radios with Existing Template type, select the desired Template Prefix and Template for each record in the list.
 - Most of the remaining fields will already be auto-filled from the Request data.

- Step 5 - **Save** the record. (Repeat steps 3 through 5 to add additional records into the list)
- Step 6 - Select the **Submit Request** button.

2.2. Activate Existing Radio

- Step 1 - Select **Add New Request** to create a new record with Type = “Activate Existing Radio”.
- Step 2 - Fill out comments and other details as required and **Save** the new request record. Status will default to “New Request”.
- Step 3 - On the Select Existing Radios tab, enter a Serial # and hit the enter key OR select the **BROWSE** button to bring up a list to search within. Repeat this process to enter additional records into the list.
- Step 4 - When finished selecting Radios into the list, Select the **Submit Request** button.

2.3. Change Features in Radio, Change Template to New, Change Template to Existing

- Step 1 - Select **Add New Request** to create a new record and select Type = “Change Features in Radio”, “Change Template to New”, or “Change Template to Existing”.
- Step 2 - If you selected “Change Template to Existing”, you also need to select a value for the “**New Template Prefix**” field on the **Select Template and Radios** tab.
- Step 3 - Fill out comments and other details as required and **Save** the new request record. Status will default to “New Request”.
- Step 4 - On the **Select Template and Radios** tab, enter a Serial # and hit the enter key OR select the **BROWSE** button to bring up a list to search within. Repeat this process to enter additional records into the list.
- Step 5 - When finished selecting Radios into the list, Select the **Submit Request** button.

2.4. Disable Radio

- Step 1 - Select **Add New Request** to create a new record and select Type = "Disable Radio"
- Step 2 - An additional field will appear below the request type where you are required to select the "Reason" for the Disable Radio request.
- Step 3 - Fill out comments and other details as required and **Save** the new request record. Status will default to "New Request".
- Step 4 - On the **Select Template and Radios** tab, enter a Serial # and hit the enter key OR select the **BROWSE** button to bring up a list to search within. Repeat this process to enter additional records into the list.
- Step 5 - When finished selecting Radios into the list, Select the **Submit Request** button.

2.5. Add Talkgroup(s)

- Step 1 - Select **Add New Request** to create a new record and select Type = "Add Talkgroup(s)"
- Step 2 - Fill out comments and other details as required and **Save** the new request record. Status will default to "New Request".
- Step 3 - On the **Add Talkgroups** tab, select the **Add** button to insert a new row into the list.
- Step 4 - Fill in the fields as desired. Here are some specifics about adding Talkgroups:
 - Alias must be unique, have no spaces or special characters (** dashes are allowed), and cannot exceed 17 characters.
- Step 5 - **Save** the record. (Repeat steps 3 through 5 to add additional records into the list)
- Step 6 - Select the **Submit Request** button.

2.6. Add Encryption to Talkgroup(s)

- Step 1 - Select **Add New Request** to create a new record and select Type = “Add Encryption to Talkgroup(s)”
- Step 2 - Fill out comments and other details as required and **Save** the new request record. Status will default to “New Request”.
- Step 3 - On the **Select Talkgroups** tab, enter a Talkgroup ID or Alias and hit the enter key OR select the **BROWSE** button to bring up a list to search within. Repeat this process to enter additional records into the list.
- Step 4 - Select the **Submit Request** button.

- END -