Villages Golf & Country Club
Emergency Preparedness Committee (EPC)
Records Database and Document Management System Manual (DMS)

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1 Introduction
This manual is written for use by those who are active in the Villages Emergency Preparedness Committee, a Committee of the Club Board. Any other usage is unauthorized.

Two Internet applications residing on the thevillagesepc.org web site are described here. First is the Villages EPC Records Database. It contains both personal and property information for those residing within the EPC Sectors. The EPC Database Records Administration Team is responsible for keeping the resident portion of this information up to date. EPC Sector Chiefs and others will be able to view and possibly modify this information and generate reports for their Sector/Area.

The second application is the EPC Document Management System (DMS). This is a repository for documents only. Examples include this manual, the triage instruction sheet, Damage Assessment Forms, etc. Users of the system can view and print these documents as needed.

2 Rationale
How do these applications help EPC Directors, Sector Chiefs, and Others in their roles?

2.1 Directors
- Standardizes Documents and Information within the EPC.
- Automatic Remote Backup means Resident, Residence, and Document information will never be lost.
- Allows immediate Internet access to all EPC Sector and Area information.
- Volunteer Report lists all EPC volunteers within a specific Sector.

2.2 Sector Chiefs
- Allows access to EPC information in a timely and standardized fashion.
- Allows immediate Internet access to all EPC Sector and Area information.
- Simplifies communication of changes to Area Reps within each Sector.
- Allows access and modification of standard documents easily, preventing stale information.

2.3 Area Reps
- Standardized Area Damage Assessment Forms can be printed whenever needed.
- Allows immediate Internet access to all EPC Sector and Area information.
- Area Reps have access to the latest EPC Documentation.
3 Start Page
The easiest way to access either the Records Database or the Document Management System is through the Start Page which can be found at the following URL:
http://www.thevillagesepc.org/start

The Login page above is the first page a user will see. All users have individual usernames and passwords. Users may click on the “Forgot Username?” or “Forgot Password?” links to retrieve their usernames and passwords.

Enter the Username and Password and click the "Login" button to enter the system.

4 Application Choice Page

Upon logging into the system or exiting an application, the user is taken to the Application Choice Page shown above. Here the user can choose to run the Records Database or DMS Application, or logout from the system. If a user has no access to the Records Database application, that user will automatically be directed to the DMS application.
5 Villages EPC Records Database Application

The Villages EPC Records Database contains both resident and residence information. Residents are people. They have skills and can have positions within the EPC organization. Residences are property. If a residence is not vacant, it may contain tools/equipment useful in an emergency.

5.1 Main Records Page

This is the Main Records Page of the Records Database Application. Although not shown here, there may be news about the application on this page. Clicking the Help button on a page brings up a copy of this manual. Users can reach various pages by clicking the link. The user may also exit the application from almost any page by clicking the "Exit Records Database" button at the upper right corner of the application.

Under the Welcome line, the line in parentheses lists the user's type (Sys Admin, Sector Admin, Modify, View) as well as what the user is allowed to access (Sectors, Areas). In addition, for the Sector Admin and Modify user types it also lists whether the user has limited or full modification.
privileges. Only members of the EPC Database Records Administration Team or an Sys Admin user type have full modification privileges. As an example, this user, whose first name is Bill, is allowed to view all the residents and residences in Sector 5. Attempting to access records outside what the user is permitted to view will result in an error message.

Users can view information on a specific residence by entering the Residence Number (House Number) and clicking the "View "button.

Users can view Resident information in two ways:

- One is by entering the Resident's Name either completely or partly, by using the "%" wildcard symbol. For this search, there is no letter case sensitivity. Thus, Young and young are equivalent for search purposes. Here are some examples. Entering "%young" will list all residents whose last name is Young. Entering %young% will list all residents who have the phrase "young" in their name. "Nick%" will list all residents whose name starts with "Nick".
- The other way to view residents is by entering the Residence Number (House Number) where they reside.

Entering both a Resident Name and a Residence Number when trying to view Resident information will generate an error.

After entering your choice of search methods, click "Search for Resident" to search and display residents matching the search criteria.
5.2 View Residence Page

The graphic above displays the result of searching for Residence information on Residence Number 8099.

<table>
<thead>
<tr>
<th>Residence Number:</th>
<th>8099</th>
<th>Street:</th>
<th>Cabernet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sector:</td>
<td>5</td>
<td>Area:</td>
<td>5</td>
</tr>
<tr>
<td>Tools:</td>
<td>Axe, Pry Bar</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication Equipment:</td>
<td>Walkie Talkies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Camping Equipment:</td>
<td>Cooking Equipment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation Equipment:</td>
<td>Golf Cart-Electric</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Equipment:</td>
<td>Various Tools, Ladder, Air compressor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Modified:</td>
<td>2012-09-11 17:40:34</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The graphic above displays the result of searching for Residence information on Residence Number 8099.
5.3 View Resident Page

The screenshot below shows the results of searching for residents. The user can click the "View" button on a record to bring up the specific information about that Resident. A user may also return to the Main Record Page by clicking the "Return to Record Page" button.

Clicking on the "View" button for the Nick Yannaccone record displays the following page:
The user can return directly to the Main Records Page by clicking the "Return to Records Page" button. The user may also return to the previous search results page by clicking the "Return to Search Results Page" button.
5.4 **Send Email Page (Special Permission Required)**

The Send Email Page is only available to select user accounts. It allows the sending of simple text emails with an optional attachment to members of the EPC team. Email may be sent to the following groups in one or more sectors depending on permissions:

- Sector Chiefs
- Sector Chiefs and Area Representatives
- Sector Chiefs, Medical, Area, and Special Representatives
- All EPC Volunteers in the Sector(s)
- All Villages Residents in the Sector(s)

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**Send Email Page**

Sending email EPC Volunteers should be done with caution so as to avoid being viewed as spam by the recipients. Please use this feature for vital EPC communications only. Thank you.

To:  Sector Chiefs and Area Reps

Subject:

Message:

Attachment? (Optional)  Browse...  No file selected.

Send Email

No, Return to Records Page
5.5 Reports Page

The work engine of the records database is in generating reports for the various sectors and areas of the Villages.

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**Reports Page**

Go to History Report

Go to CSV Report

For all of the reports below: If a report does not load or print in your browser, please use the “Save as” feature to save a copy of the report on your PC or Mac. You can then load the file using the word processing program of your choice.

**Sector and Area Summary Report (RTF Format)**

(a.k.a. Summary of Resident Information Report)

Please enter the Sector and Area Number of the report desired.

Sector: 1  Area: 

Get Summary Report

**Residence Report (RTF Format)**

Please enter single residence number for single residence report. Please enter the Sector and Area Number for residence report for that sector and area.

Residence Number:  OR  Sector: 1  Area: 

Get Residence Report

**Resident Report (RTF Format)**

Please enter the Sector and Area Number for resident report for that sector and area.

Sector: 1  Area: 

Get Resident Report

**Volunteer Report (RTF Format)**

Please choose the Sector Number of the report desired.

Sector: 1  

Get Volunteer Report
Users can reach the History Report or CSV Report by clicking the named link. With the exception of the History and CSV Reports, all reports are generated in Rich Text Format (RTF) for compatibility reasons.

5.5.1 **Sector and Area Summary Report**

Lists information about the residences and residents in the Sector and Area specified. This is an augmented version of the Summary of Resident Information report. For each residence lists the following:
- Address
- Resident Names
- Phone Numbers
- Personal Considerations
- Skills, Equipment, and EPC Position

5.5.2 **Residence Report**

Long form version of the Summary Report, listing all the information for each residence within the sector and area specified including resident information.

5.5.3 **Resident Report**

Lists all the Resident Information for residents in the specified Sector and Area.

5.5.4 **Volunteers Report**

Contact List for volunteers in the specified Sector and Area.

5.6 **History Report**

The History Report Page allows the user to enter a date range to find changes that took place in their Sectors and Areas. Following is the History Report page:
Clicking the "Get History Report" button produces a web page report that shows the viewable changes in the date range specified. The following changes are displayed for each change record:

- **Record Type:** Residence or Resident
- **Action:** Create, Modify, or Delete
- **By:** Name of person who made the change.
- **Residence/Resident:** Either the Residence Number or the Resident Name changed.
- **Sector:** Sector Number
- **Area:** Area Number
- **Timestamp:** Date and time when the change was made. Format is YYYY-MM-DD HH:MM:SS. Hours are expressed in 24 hour clock notation. (e.g. 20 is 8PM).
5.7 CSV Report (Special Permission Required)

The CSV Report Page is only available to select user accounts. It allows the generation of Comma Separated Value (CSV) files of the entire resident and residence database. These CSV files can then be read by spreadsheet and other programs such as Microsoft Excel, thus allowing the creation of other reports of interest.

**CSV Report Page**

**Resident CSV Report**

Name, Residence, and Street are always in the report.

- Email Address: 
- Emergency Contact Email: 
- Home Phone: 
- Mobile Phone: 
- Personal Considerations: 
- Skills: 
- Other Skills: 
- Notes: 
- EPC Role:

The following option splits the "Name" field into "Last Name" and "First Name" fields. It then sorts the resident records by Last Name in ascending order.

- Last Name Sort: 

[Resident CSV Report]

**Residence CSV Report**

Residence, Street, Sector, and Area are always in the report.

- Tools: 
- Communication Equipment: 
- Camping Equipment: 
- Transportation Equipment: 
- Other Equipment: 
- Notes:

[Residence CSV Report]

[Return to Reports Page]
5.7.1 Resident CSV Report
The Resident CSV Report creates a CSV File from the list of residents in the database. The Name, Residence (House Number), and Street are always included in the report. In addition, the following fields may be added by clicking the associated checkbox:
- Email Address (of the Resident)
- Emergency Contact Email Address (The Email address used to contact relatives in the event of an emergency)
- Main Phone
- Other Phone
- Personal Considerations
- Skills
- Other Skills
- Notes
- EPC Role (creates four columns: EPC Role, EPC Notes, EPC Sector, EPC Area)

In addition, there is the ability to split the "Name" field into "Last Name" and "First Name" fields and then have the resident records sorted by the "Last Name" field in ascending order. This checkbox option is labeled Last Name Sort.

5.7.2 Residence CSV Report
The Residence CSV Report creates a CSV File from the list of residences in the database. The Residence (House Number), Street, Sector, and Area are always included in the report. In addition, the following fields may be added by clicking the associated checkbox:
- Tools
- Communication Equipment
- Camping Equipment
- Transportation Equipment
- Other Equipment
- Notes
6 Document Management System (DMS) Application

The Villages EPC Document Management System (DMS) contains those documents needed by EPC Sector Chiefs, Area Reps, and others. Access is controlled through username, password, and other permissions. Examples of documents stored in this repository include Damage Assessment Worksheets, Sector and Area Maps, and EPC Director Lists.

6.1 Main Page

This is the main page of the DMS. The user can search for documents by clicking on the Search icon (see 5.4), or exit the application by clicking on the Exit icon.

The Menu Bar contains the following fields:

- Home
  - Clicking this field returns the user to the Main Page.
- Help
  - A link to the PDF version of this manual.
Location
To the right of the "Home" field there is a vertical line followed by location information showing where the user is in the DMS. This may either be a single location such as "Document Listing" or a linked breadcrumb list such as "Document Listing>File Details>File View". Clicking on "Document Listing" in this case will take you to the Main (Home) Page. Clicking on "File Details" will take you to the "File Details" page as described below.

Username
The username of the logged in user is shown at the right hand of the menu bar.

Documents are stored in a tree configuration of categories with "EPC Documents" being the root category. Clicking the '+' key next to any category will expand it. Following is the view of the main page with some of the categories expanded.

Clicking on the file type icon (picture) will bring up the File Details page for that file (see 5.3.1).
6.2 File Pages

6.2.1 File Details Page

The example above shows the File Details Page for a specific file. Information about the file is displayed on this page. Clicking on the View icon (see 5.3.2) will allow the user to download the file to their personal computer, or view the file in their web browser (if supported).

Clicking on the History icon will show the revision history of the file as shown below:
6.2.2 File View Page

The File View Page allows the user to either download the file to their personal computer by clicking the "Download" button, or view the file in their browser (if supported) by clicking "Click Here".

6.3 Searches

6.3.1 Search Page

At the top of the Main Page is the Search icon. Clicking on this icon brings up the search page:

The Search Page allows searching for a document in the DMS. Most searches are done for phrases that closely match the one specified. Clicking the "Exact Phrase" checkbox returns only those with the exact phrase. Case sensitivity is also ignored unless the user checks the "Case Sensitivity" checkbox.
6.3.2 Search Example
The following is a search example:

In this example, we are searching for the term "Triage. Clicking the "Search" button produces the following result:

If there is more than one search result, each result will be displayed as a line on the Search Results page.

By clicking on the "File Name", the user will display the File Details page for that file. Clicking on the View icon will cause the file to be loaded for viewing directly into the browser window (if supported).

7 Bugs and Feature Requests
Any Problem (Bug) reports and/or Feature Requests should be sent to the EPC Records Database and Document Management System Administrator.