Reporting from Lists in IROC

IROC provides dispatch managers with the ability to create reports specified to your needs. You can use the various filter and search tools in IROC Data Management Tool (DMT) to find exactly what you need. You can then save your filters, create favorites, share favorites, and export the material for reporting purposes.

Filtering Lists

Filtering lists is a powerful feature that allows you to quickly find and organize data as you need it. IROC DMT provides several ways to use filters to create custom views of information. You can use one or all of these to find the information for a report.

Breadcrumbs

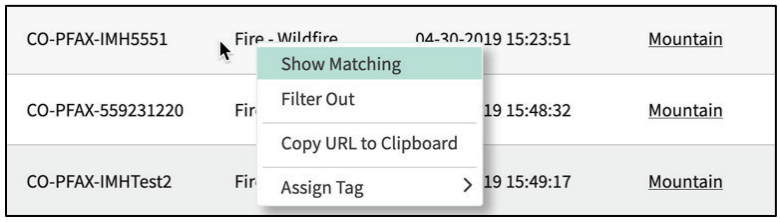
As you apply filters to a list, breadcrumbs appear at the top of the page. Breadcrumbs are ordered from left to right—the leftmost element is the most general, and the right is the most specific.

1. Clicking a *breadcrumb element* (such as =Idaho) keeps that condition but removes all the conditions to the right of it.
2. Clicking the *condition separator* (>) before a condition removes only that condition.
   For example, in the breadcrumbs list shown here, clicking the arrow to the left of "=idaho" *would delete only that condition; everything to the right of it will remain.*

> **Note:** Gray text in a breadcrumbs list cannot be changed.

Right-Click Filtering

Use this tool in any module that provides a list view in the main content area, such as **All Incidents**. Simply right-click on a field and choose either Show Matching or Filter Out.



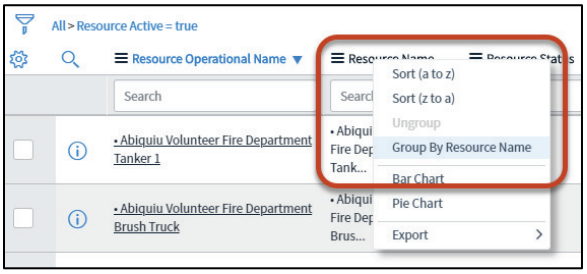
- **Show Matching** – Shows all records that match that term.
- **Filter Out** – Excludes all records that match that term.

> **Tip:** To revert to the previous view of the list, use the breadcrumbs, or click the **Delete** icon (✖) beside the applied filter and click **Run**.

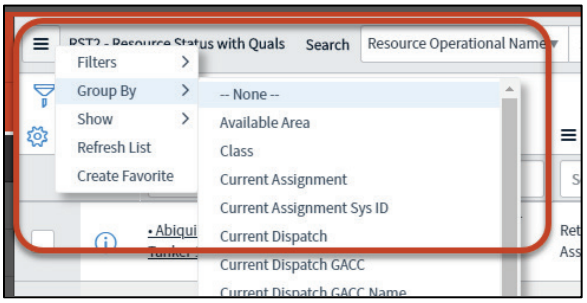
Grouping

You can filter a list by grouping related elements. There are two options for grouping by a column.

1 **Option 1:** Right-click on the column heading you want to group records by and select the **Group By…** option from the drop-down menu.



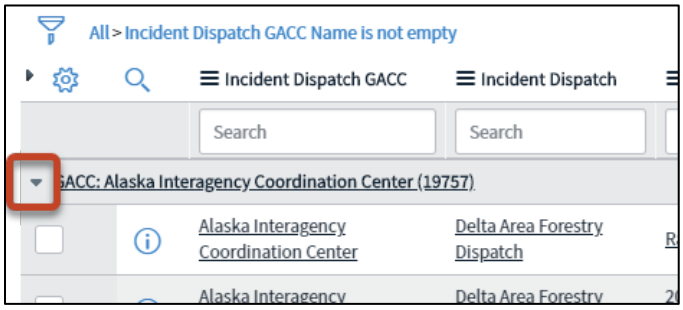
2 **Option 2:** Click the **List Controls** icon at the top left of the main content frame to select an overall category for grouping items. Hover over **Group By…** to open a drop-down menu of options. Click on your preferred option.



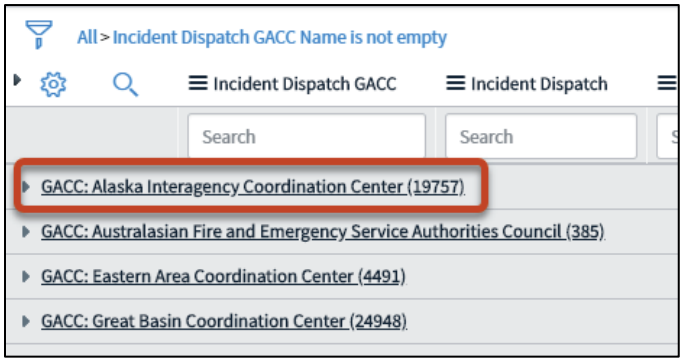
Note: The **Group By…** option is not available for all columns.

3 You then have two options for viewing all records in a grouped list:

a **Option 1:** Click on the arrow to the left of the heading to expand or collapse the list of records.

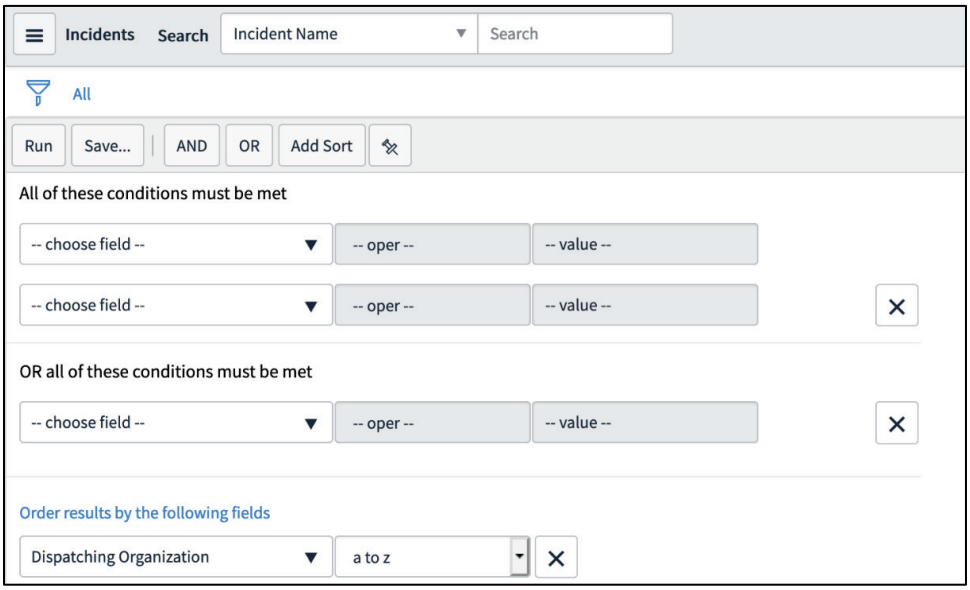


b **Option 2:** Click on the hyperlink to open a separate window that shows only the list of related records.



Complex Filters

Another option for filtering lists is to use the powerful Search and Filter tools.



1 Click the **Filter** icon (▼) to show (or hide) the filter modification options.

2 Click **AND** or **OR** to add conditions to the filter.

   a Choose an option and an operator from the Choose Field and Operator drop-down menus, respectively.

   b Type text in each Search (--value--) field.

Note: The content in the **Choose Field** drop-down varies depending on the list. The content in the **Operator** drop-down varies depending on the selected field. Examples of operators are “is,” “starts with,” “ends with,” and so forth.

3 Click **Add Sort** to add a column sort function to the filter (e.g., sort a column in ascending or descending order after the filter has been applied).

   a Choose a list column from the first drop-down.

   b Indicate in the second drop-down whether to sort in ascending or descending order.

Note: The screenshot shows fields for both the **AND** and the **OR** conditions, as well as for the **Add Sort** function.

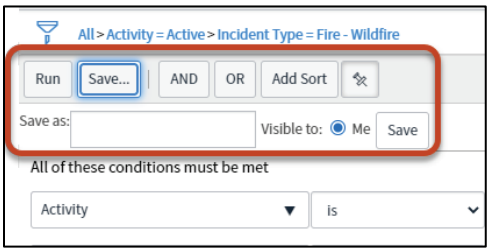
4 To remove a condition, click **Delete** (✖) to the right of the field.

5 After all information is entered, click **Run** to apply the filter to the list.
The filters you have applied will appear in the breadcrumbs.

Saving Filters

After applying filters, you can **Save** them to use again in the future.

1 Enter a name for your filter and click **Save**.



2 To access this filter again from this list, click the **List Controls** (☰) icon and choose it from the Filters drop-down.

Sharing Filters

You can also share a filter with a coworker.

1 After applying filters, highlight the URL in your web browser.

2 Right-click and select Copy from the options or press Ctrl-C.

3 Paste the URL in an email or other message and send to your coworker.
Your coworker must also have access to IROC DMT.

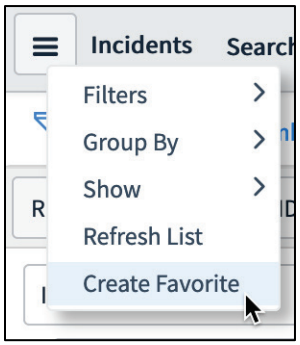
Creating Favorites in the Data Management Tool

After applying a filter, you may want to save it as a favorite for easy access in the future. Favorites are stored at the top of your All Files menu in the Application Navigator and in the Favorites menu.

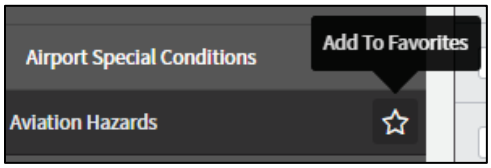
Tip: Creating favorites is a good way to filter out applications or modules that you do not often use.

1 There are several ways to create a favorite after applying a filter.

a Click the **List Controls** icon (☰) and select Create Favorite. In the screen that appears, name the list and apply a color an icon. Then click **Done**.



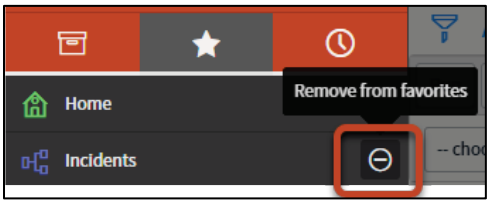
b Hover over the name of an application or module in the File tab of the application navigator. Click the Star to add this to your favorites.



c Drag the last item in a breadcrumbs list to the Favorites menu in the Application Navigator.

2 You can customize your Favorites by clicking the Pencil (✎) icon in the lower right corner of the Favorites menu. Rename your favorite and choose a color and icon to be associated with it.

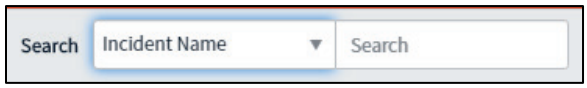
3 To remove a filter, hover to the right of the name in the Favorites menu and click the **Remove From Favorites** icon.



Performing Searches

In addition to applying filters, you can also use the Search tools in DMT to find information for reports.

1 **List search filter** – This tool is found at the top of the main content area.

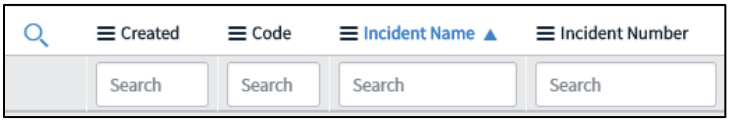


a Choose a data element (column) from the filter drop-down (e.g., “Incident Name”).

b Type your search term in the search field.

c Press Enter.
The main content area will show all records that match your search criteria.

2 **Column header search** –



a Click the **Search** icon (🔍) to show/hide the search fields at the top of each column. (Click this icon again to hide the search fields.)

b Type text in one or more fields.
You can press Tab *on your keyboard to move from field to field.*

d When done, press Enter.

Tip: To remove a search term, delete it from the Search field and press Enter again.

Wildcard Searches

All search fields support wildcard searches. Use the symbols as shown in the left column to perform the search described in the right column.

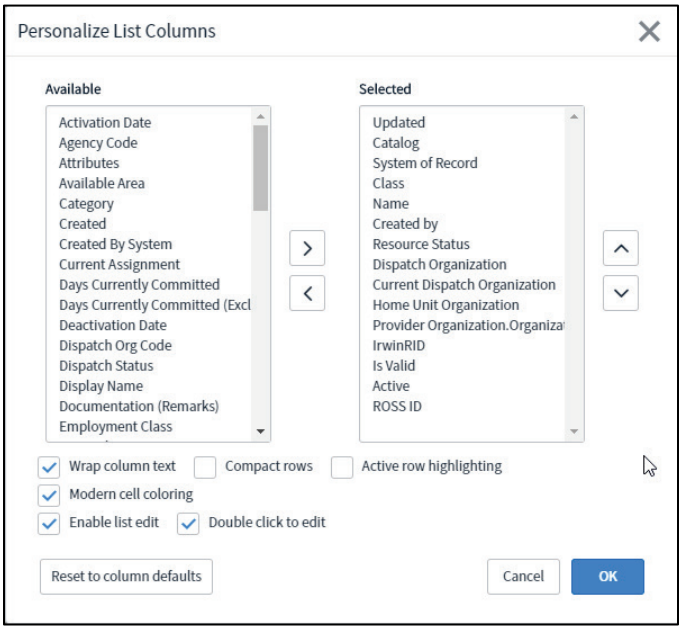
Wildcard Entry	Description
*search-term %search-term%	Values that contain search term
%search-term	Values that end with search term
search term%	Values that start with search term
=search term	Values that equal search term
!*search term	Values that do not contain search term
!=search term	Values that do not equal search term

Personalizing Lists in the Data Management Tool

IROC DMT offers you a way to personalize the information you see in each list—for example, by adding or removing columns or changing their order of appearance on the screen.

> **Tip:** When selecting items in either the **Available** or **Selected** field, you can select more than one item by using Ctrl-Click or Shift-Click. You can also click and drag to select a number of sequential items.

1 Click the **Personalize List (⚙)** icon in the top-left corner of a list view to open the Personalize List Columns screen.



2 To add an item(s) to your list view, select it in the **Available** field and then click the right-pointing arrow.

3 To remove an item(s) from your list view, select it in the **Selected** field and then click the left-pointing arrow.

4 To change the order of columns, click an item in the **Selected** field and use the up or down arrows to move it.

> **Tip:** To move more than one item, click and drag to highlight and then use the up/down arrows to move them as a group.

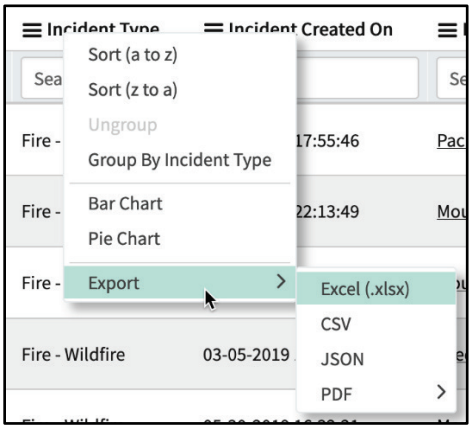
5 Click the checkboxes at the bottom of the screen to change list view and action options.

6 When done, click **OK**.

Exporting Lists in the Data Management Tool

Once you have configured your list to show all relevant information, you can save the list or export it for reporting.

1 Right-click on any column header.

2 Select an option from the Export drop-down (MS Excel, CSV, JSON, or portrait of landscape PDF).

3 When the export is complete, choose **Download** to save or open the file on your device.