EQuIS Enterprise Training Exercises

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EQuIS Enterprise Training Exercises

Enterprise EZView- Building Reports and Exporting Data

EQuIS Enterprise allows users to build and export reports as different file types, allowing data to be easily imported into third party programs for additional review and/or manipulation. In these exercises, build various reports and export them as Excel (.**xls**), ArcGIS shapefile (.**shp**), tab delimited (.**txt**) and Google Earth (.**kmz**) files.

Publishing Reports to Enterprise

"Other" Reports are .dll reports that are stored in the EQuIS Professional installed directory, rather than in the database itself. EQuIS Professional will automatically recognize custom reports if the *.dll is in the same folder as the EQuIS Professional application.

In order to make these reports, such as the Google Earth Reports, available in EQuIS Enterprise, first publish the reports to the database following the steps below.

Database reports cannot be imported, as they are already stored in the database (in ST_REPORT and ST_REPORT_PARAMETER). Active Reports and Crosstabs may also be published, but need to be done through their respective interfaces.

1. Launch **EQuIS Professional**
2. Login to the Springfield Training Facility (or other desired facility).
3. Click the *Reports* button on the toolbar.
4. When viewing the list of reports, right-click in the white space and choose **Import Report(s)**

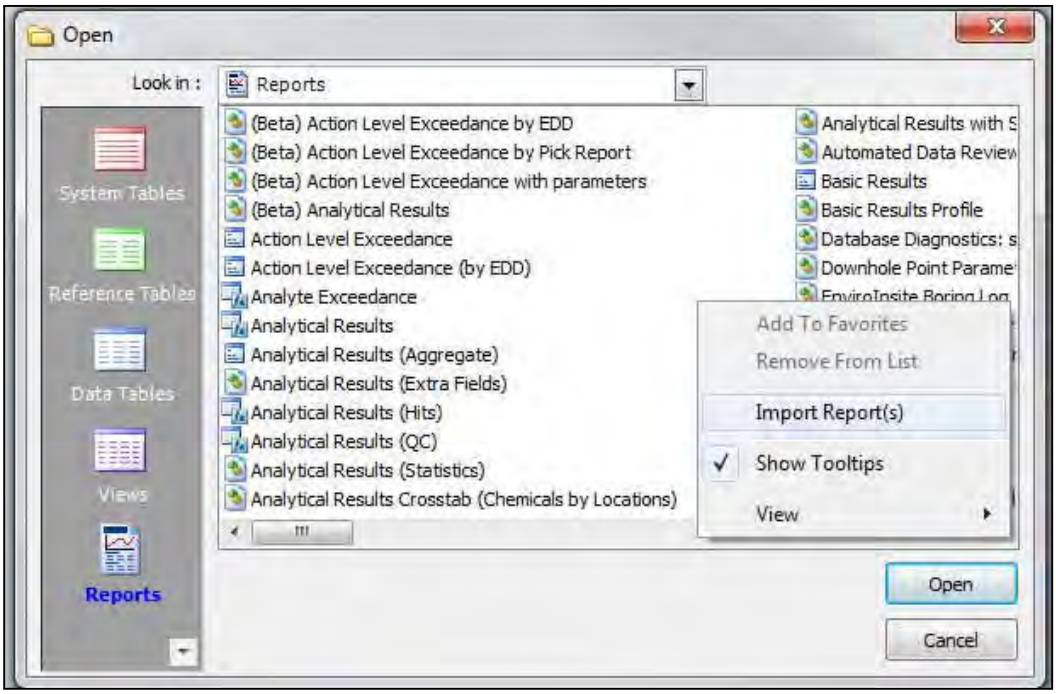


Figure 1- Import Reports

5. Browse to the .NET assembly (*.dll) containing the report(s) to be published, such as the **EarthSoft.Interfaces.Google.dll** located in the *C:\Program Files\EarthSoft\EQuIS* directory by default.

A prompt appears displaying the option to store the assembly in the database (as a BLOB in the st_report.assembly column).

- Clicking ***Yes*** means the bytes of the assembly are stored directly in the database and it is not necessary to copy the *.dll file to any other machines. However, this also makes it more difficult to upgrade the assembly if/when a new version becomes available.

- Clicking ***No*** will **not** store the assembly in the database. Instead, manually copy the assembly to the EQuIS Enterprise{{\bin}} folder (default is C:\Program Files\EarthSoft\EQuIS Enterprise\bin. Having the *.dll stored outside of the database makes it easier to update (by overwriting the existing *.dll with the updated *.dll).

6. For this exercise, select **Yes**.

Another message prompt will occur explaining how many reports were found and have been published.

- Clicking ***Yes*** will commit the changes to the database

- Clicking ***No*** will abort all chanages and nothing will be committed to the database.

7. For this exercise, select **Yes**.

Note: All *.dlls are listed (regardless if the reports associated with them have already been published). However, if you select to import a *.dll and its reports have already been published, you will receive a prompt which asks if you want to republish the *.dll.

Exporting to Excel

This section of the exercise will show users how to export an Analytical Results Report to a Microsoft Excel file. This will allow the file to be imported and manipulated within MS Excel.

This exercise uses the *Analytical Results Report*.

1. Open **Internet Explorer** and type the Enterprise Web page URL into the address bar.

2. Log in to Enterprise with the **User Name** and **Password**.

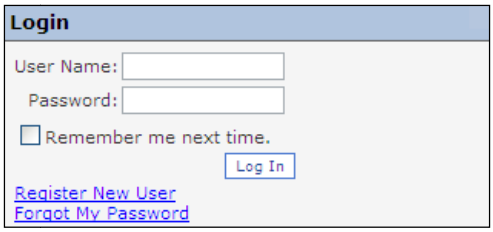


Figure 2: Enterprise Login Screen

3. Once logged in, click on the **Facility** tab to display the subscribed facilities.

Note that the *multiple house* symbol indicates a facility *group* and a *single house* symbol indicates a *single facility*. Both may be selected to run reports against all of the facilities in a facility group or just the locations in one facility.

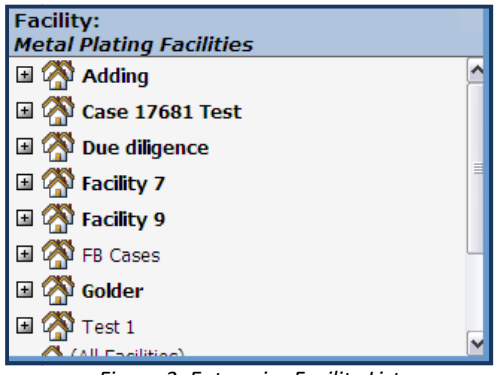


Figure 3: Enterprise Facility List

4. Login to the facility of choice – by selecting a facility name.

This exercise uses the **Metal Plating Facilities**.

5. Click on the **Enterprise EZView** tab located on the left hand side of the screen.

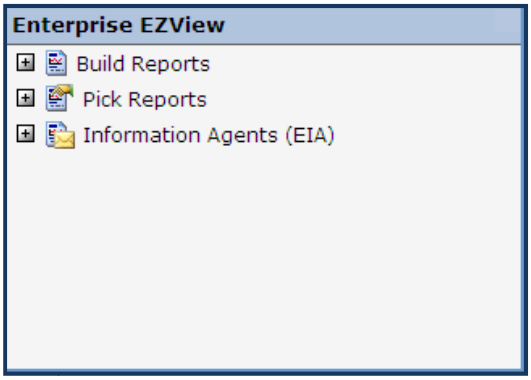


Figure 4: Enterprise EZView

6. Click **Build Reports** to display a list of custom reports.

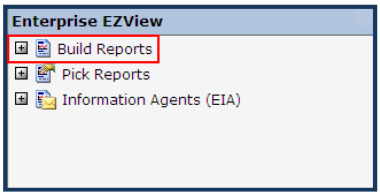


Figure 5: Build Reports

7. For this section, select the **Analytical Results** report.

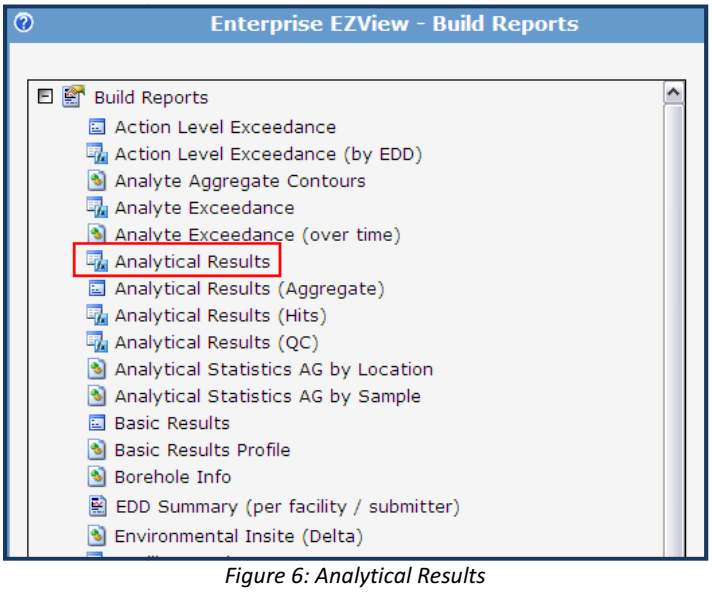


Figure 6: Analytical Results

8. Build the analytical results reports by choosing all of the appropriate criteria (e.g. location, sample type, analytes, etc.).

9. Select the following paramaters:

Parameter	Selection
Location Group	
Sample Type	N
Matrix	WG
Analytical Group	

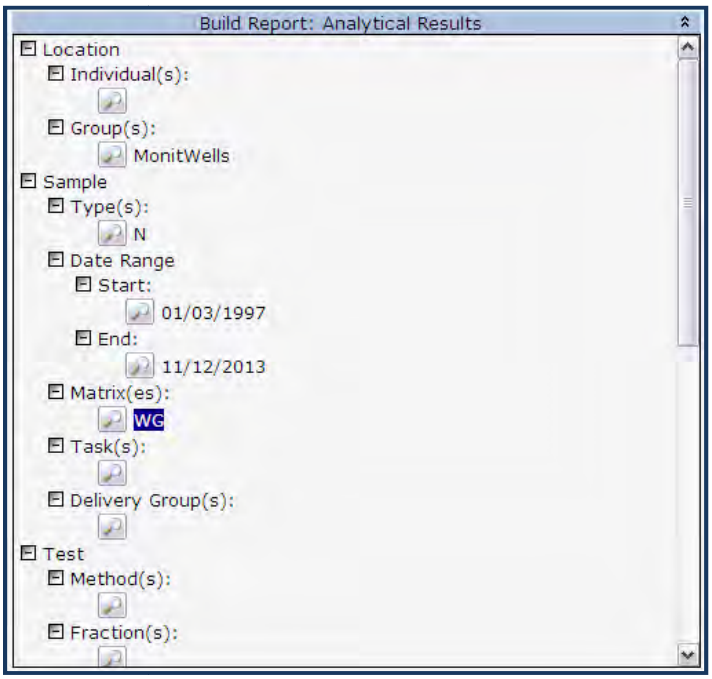


Figure 7: Selecting the Report Parameters

10. To preview a list of the first 30 rows of data, (or the number specified in the administration tab) click the **Preview** button. This is helpful to review the data selected in Step 9 before exporting.

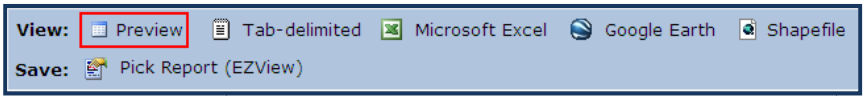


Figure 8: Preview Button

300 of 504 row(s)

facility_id	facility_code	sys_loc_code	loc_group	loc_report_order	sys_sample_cod	sample_name	sample_date	sample_type_
1	Springfield	B-30	MonitWells	1	B-30_19971210	B-30_19971210	12/10/1997 00:0	N
1	Springfield	B-30	MonitWells	1	B-30_19980310	B-30_19980310	03/10/1998 00:0	N
1	Springfield	B-30	MonitWells	1	B-30_19980608	B-30_19980608	06/08/1998 00:0	N
1	Springfield	B-31	MonitWells	2	B-31_19970315	B-31_19970315	03/15/1997 00:0	N
1	Springfield	B-31	MonitWells	2	B-31_19970613	B-31_19970613	06/13/1997 00:0	N
1	Springfield	B-31	MonitWells	2	B-31_19970911	B-31_19970911	09/11/1997 00:0	N
1	Springfield	B-31	MonitWells	2	B-31_19971210	B-31_19971210	12/10/1997 00:0	N
1	Springfield	B-31	MonitWells	2	B-31_19980310	B-31_19980310	03/10/1998 00:0	N
1	Springfield	B-31	MonitWells	2	B-31_19980608	B-31_19980608	06/08/1998 00:0	N
1	Springfield	B-33	MonitWells	4	B-33_19970315	B-33_19970315	03/15/1997 00:0	N
1	Springfield	B-33	MonitWells	4	B-33_19970613	B-33_19970613	06/13/1997 00:0	N
1	Springfield	B-33	MonitWells	4	B-33_19970911	B-33_19970911	09/11/1997 00:0	N
1	Springfield	B-33	MonitWells	4	B-33_19971210	B-33_19971210	12/10/1997 00:0	N
1	Springfield	B-33	MonitWells	4	B-33_19980310	B-33_19980310	03/10/1998 00:0	N
1	Springfield	B-33	MonitWells	4	B-33_19980608	B-33_19980608	06/08/1998 00:0	N
1	Springfield	B-34	MonitWells	5	B-34_19970315	B-34_19970315	03/15/1997 00:0	N
1	Springfield	B-34	MonitWells	5	B-34_19970613	B-34_19970613	06/13/1997 00:0	N
1	Springfield	B-34	MonitWells	5	B-34_19970911	B-34_19970911	09/11/1997 00:0	N

Figure 9: Report Preview Results

11. If the data in the preview appears complete, click the **Microsoft Excel** export button.

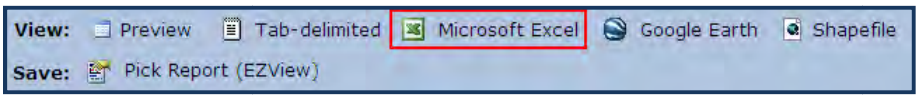


Figure 10: Export to Microsoft Excel

12. Choose Save to save the file to the hard drive or click **Open** to open the file directly in Excel.

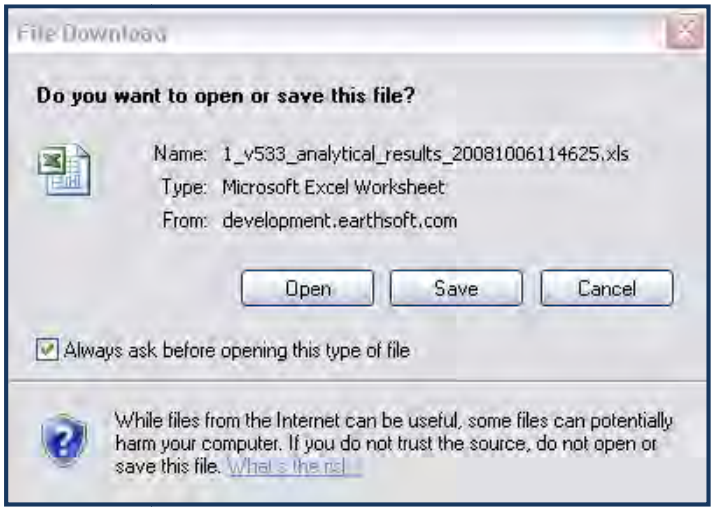
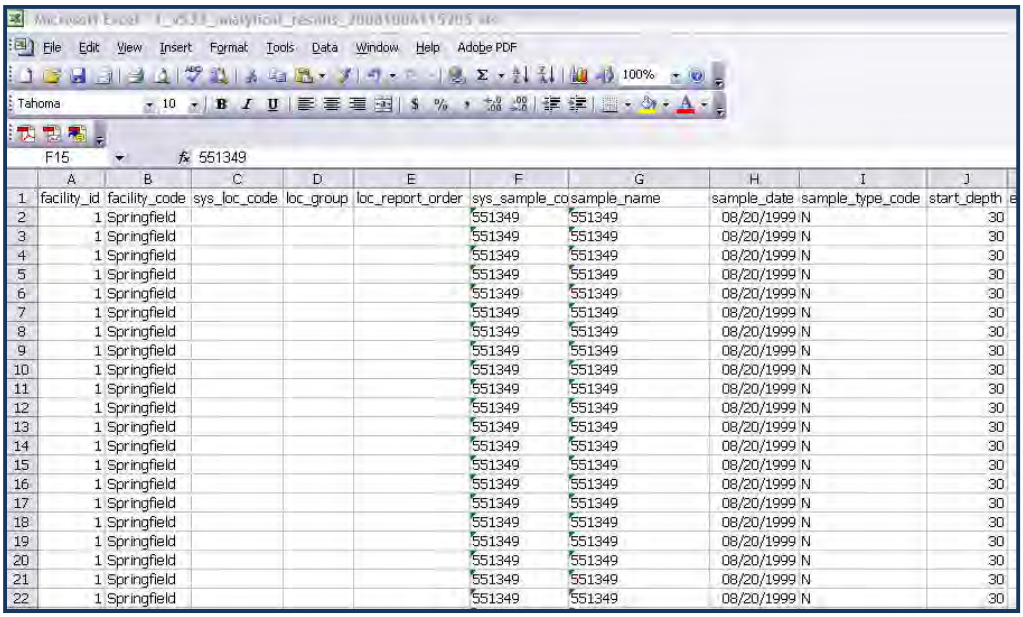


Figure 11: File Download Prompt to Save or Open



	A	B	C	D	E	F	G	H	I	J
1	facility_id	facility_code	sys_loc_code	loc_group	loc_report_order	sys_sample_co	sample_name	sample_date	sample_type_code	start_depth
2	1	Springfield				551349	551349	08/20/1999	N	30
3	1	Springfield				551349	551349	08/20/1999	N	30
4	1	Springfield				551349	551349	08/20/1999	N	30
5	1	Springfield				551349	551349	08/20/1999	N	30
6	1	Springfield				551349	551349	08/20/1999	N	30
7	1	Springfield				551349	551349	08/20/1999	N	30
8	1	Springfield				551349	551349	08/20/1999	N	30
9	1	Springfield				551349	551349	08/20/1999	N	30
10	1	Springfield				551349	551349	08/20/1999	N	30
11	1	Springfield				551349	551349	08/20/1999	N	30
12	1	Springfield				551349	551349	08/20/1999	N	30
13	1	Springfield				551349	551349	08/20/1999	N	30
14	1	Springfield				551349	551349	08/20/1999	N	30
15	1	Springfield				551349	551349	08/20/1999	N	30
16	1	Springfield				551349	551349	08/20/1999	N	30
17	1	Springfield				551349	551349	08/20/1999	N	30
18	1	Springfield				551349	551349	08/20/1999	N	30
19	1	Springfield				551349	551349	08/20/1999	N	30
20	1	Springfield				551349	551349	08/20/1999	N	30
21	1	Springfield				551349	551349	08/20/1999	N	30
22	1	Springfield				551349	551349	08/20/1999	N	30

Figure 12: Exported Results in MS Excel

Exporting to *.txt file

This exercise shows how to export an Analytical Results Report to a text file (.txt) for the purpose of importing and manipulating it in a text editor. The reason for exporting to a .txt file is to avoid Excel issues of when an analyte has an apostrophe (‘) in the name OR when Excel row limits are exceeded.

This exercise uses the *Analytical Results Report.*

1. Follow Steps 1 – 9 outlined in the previous section.

2. Click the **Tab-delimited** export button.

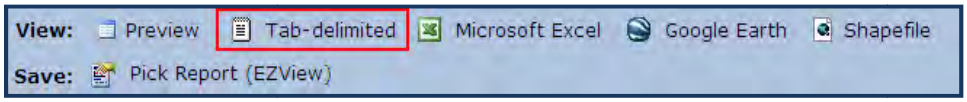
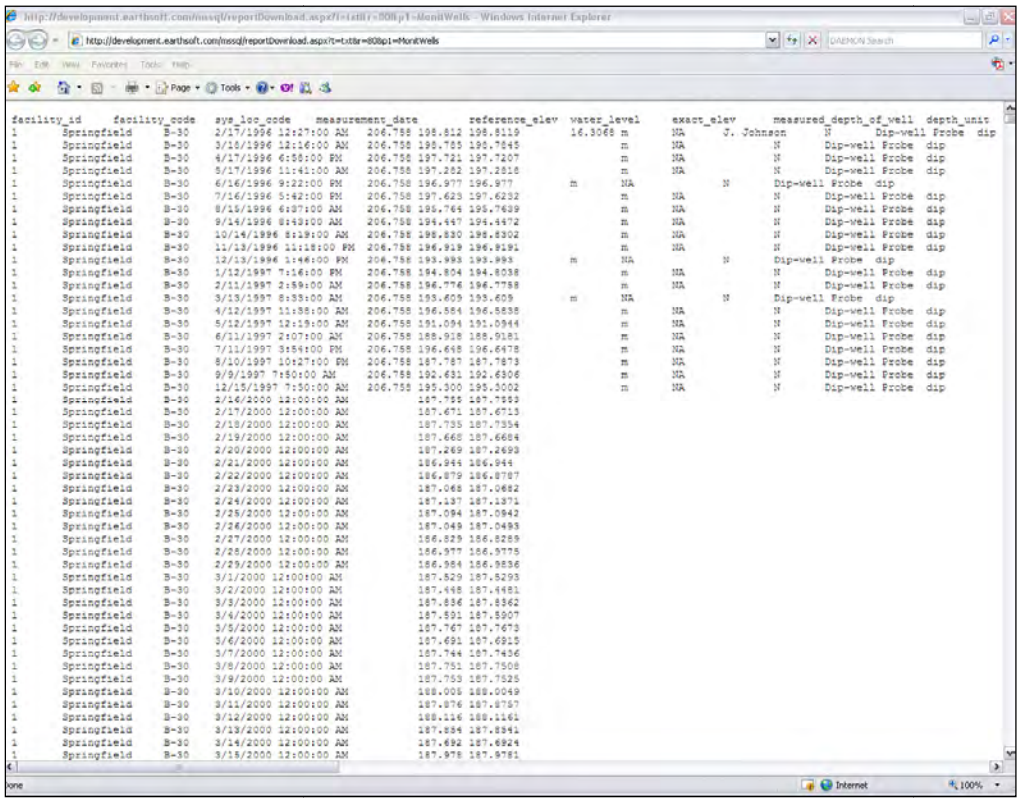


Figure 13: Tab-delimited Option

3. Choose **Save** to save the file to the hard drive or click **Open** to open the file directly in Microsoft Internet Explorer.

4. The TXT file will be opened directly into a new window of Microsoft Internet Explorer.



facility_id	facility_code	sys_loc_code	measurement_date	reference_elev	water_level	exact_elev	measured_depth_of_well	depth_unit
1	Springfield	B-30	2/17/1996 12:17:00 AM	206.758	198.8119	16.3049 m	NA J. Johnson N	Dip-well Probe dip
1	Springfield	B-30	3/15/1996 12:16:00 AM	206.758	198.755	198.7545 m	NA N	Dip-well Probe dip
1	Springfield	B-30	4/17/1996 6:58:00 PM	206.758	197.721	197.7207 m	NA N	Dip-well Probe dip
1	Springfield	B-30	5/17/1996 11:41:00 AM	206.758	197.282	197.2818 m	NA N	Dip-well Probe dip
1	Springfield	B-30	6/16/1996 9:22:00 PM	206.758	196.977	196.977 m	NA N	Dip-well Probe dip
1	Springfield	B-30	7/16/1996 5:42:00 PM	206.758	197.623	197.6232 m	NA N	Dip-well Probe dip
1	Springfield	B-30	8/15/1996 6:37:00 AM	206.758	195.764	195.7639 m	NA N	Dip-well Probe dip
1	Springfield	B-30	9/14/1996 8:43:00 AM	206.758	194.447	194.4472 m	NA N	Dip-well Probe dip
1	Springfield	B-30	10/14/1996 8:19:00 AM	206.758	198.830	198.8302 m	NA N	Dip-well Probe dip
1	Springfield	B-30	11/13/1996 11:18:00 PM	206.758	196.919	196.9191 m	NA N	Dip-well Probe dip
1	Springfield	B-30	12/13/1996 1:48:00 PM	206.758	193.993	193.993 m	NA N	Dip-well Probe dip
1	Springfield	B-30	1/12/1997 7:16:00 PM	206.758	194.804	194.8038 m	NA N	Dip-well Probe dip
1	Springfield	B-30	2/11/1997 2:59:00 AM	206.758	196.776	196.7758 m	NA N	Dip-well Probe dip
1	Springfield	B-30	3/13/1997 8:59:00 AM	206.758	195.609	195.609 m	NA N	Dip-well Probe dip
1	Springfield	B-30	4/12/1997 11:38:00 AM	206.758	196.584	196.5838 m	NA N	Dip-well Probe dip
1	Springfield	B-30	5/12/1997 12:19:00 AM	206.758	191.094	191.0944 m	NA N	Dip-well Probe dip
1	Springfield	B-30	6/11/1997 2:07:00 AM	206.758	188.918	188.9181 m	NA N	Dip-well Probe dip
1	Springfield	B-30	7/11/1997 3:54:00 PM	206.758	196.648	196.6478 m	NA N	Dip-well Probe dip
1	Springfield	B-30	8/10/1997 10:27:00 PM	206.758	187.787	187.7873 m	NA N	Dip-well Probe dip
1	Springfield	B-30	9/9/1997 7:50:00 AM	206.758	192.631	192.6306 m	NA N	Dip-well Probe dip
1	Springfield	B-30	12/15/1997 7:50:00 AM	206.758	195.300	195.3002 m	NA N	Dip-well Probe dip
1	Springfield	B-30	2/14/2000 12:00:00 AM		187.799	187.7993		
1	Springfield	B-30	2/17/2000 12:00:00 AM		187.671	187.6713		
1	Springfield	B-30	2/18/2000 12:00:00 AM		187.735	187.7354		
1	Springfield	B-30	2/19/2000 12:00:00 AM		187.668	187.6684		
1	Springfield	B-30	2/20/2000 12:00:00 AM		187.269	187.2693		
1	Springfield	B-30	2/21/2000 12:00:00 AM		186.944	186.944		
1	Springfield	B-30	2/22/2000 12:00:00 AM		186.879	186.8787		
1	Springfield	B-30	2/23/2000 12:00:00 AM		187.068	187.0682		
1	Springfield	B-30	2/24/2000 12:00:00 AM		187.137	187.1371		
1	Springfield	B-30	2/25/2000 12:00:00 AM		187.094	187.0942		
1	Springfield	B-30	2/26/2000 12:00:00 AM		187.049	187.0493		
1	Springfield	B-30	2/27/2000 12:00:00 AM		186.829	186.8289		
1	Springfield	B-30	2/28/2000 12:00:00 AM		186.977	186.9775		
1	Springfield	B-30	2/29/2000 12:00:00 AM		186.984	186.9836		
1	Springfield	B-30	3/1/2000 12:00:00 AM		187.529	187.5293		
1	Springfield	B-30	3/2/2000 12:00:00 AM		187.448	187.4481		
1	Springfield	B-30	3/3/2000 12:00:00 AM		187.836	187.8362		
1	Springfield	B-30	3/4/2000 12:00:00 AM		187.591	187.5907		
1	Springfield	B-30	3/5/2000 12:00:00 AM		187.767	187.7673		
1	Springfield	B-30	3/6/2000 12:00:00 AM		187.691	187.6915		
1	Springfield	B-30	3/7/2000 12:00:00 AM		187.744	187.7436		
1	Springfield	B-30	3/8/2000 12:00:00 AM		187.751	187.7508		
1	Springfield	B-30	3/9/2000 12:00:00 AM		187.753	187.7525		
1	Springfield	B-30	3/10/2000 12:00:00 AM		188.005	188.0049		
1	Springfield	B-30	3/11/2000 12:00:00 AM		187.876	187.8767		
1	Springfield	B-30	3/12/2000 12:00:00 AM		188.116	188.1161		
1	Springfield	B-30	3/13/2000 12:00:00 AM		187.834	187.8341		
1	Springfield	B-30	3/14/2000 12:00:00 AM		187.692	187.6924		
1	Springfield	B-30	3/15/2000 12:00:00 AM		187.978	187.9781		

Figure 14: Exported Results as Text File (.txt)

Exporting to a *.kmz file

This exercise will show users how to export a Google Earth Report to Google Earth. This will allow the data to be graphically illustrated in Google Earth.

Export data from an *Analytical Results Report* or *Water Levels Report* by building the reports (as shown in previous exercises) and by selecting the Google Earth icon on the toolbar. This creates a .kmz file that can be opened in Google Earth or Save to a directory of choice.

This exercise uses the **Google Earth Analytical Results (Contour) Report**. If Google Earth Analytical Results (Contour) Report is not visible, it is necessary to publish the Google Earth reports via EQuIS Professional. Please contact the database administrator for support with this task.

1. Login to EQuIS Enterprise and a facility.
2. Click on the **Enterprise EZView** tab located on the left hand side of the screen.
3. Click **Build Reports** to display a list of standard reports.
4. For this section, select the **Google Earth: Analytical Results (Contour)** report.

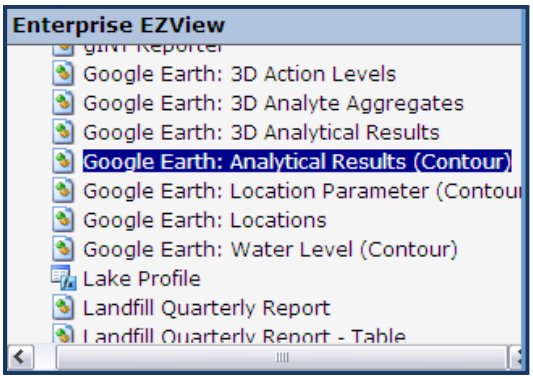


Figure 15: Google Earth: Analytical Results (Contour) menu option

5. Load a previously saved *Analytical Results Report* by choosing a previously saved **Pick Report**.

The Google Earth reports require a saved Pick Report to be selected before it can be exported.

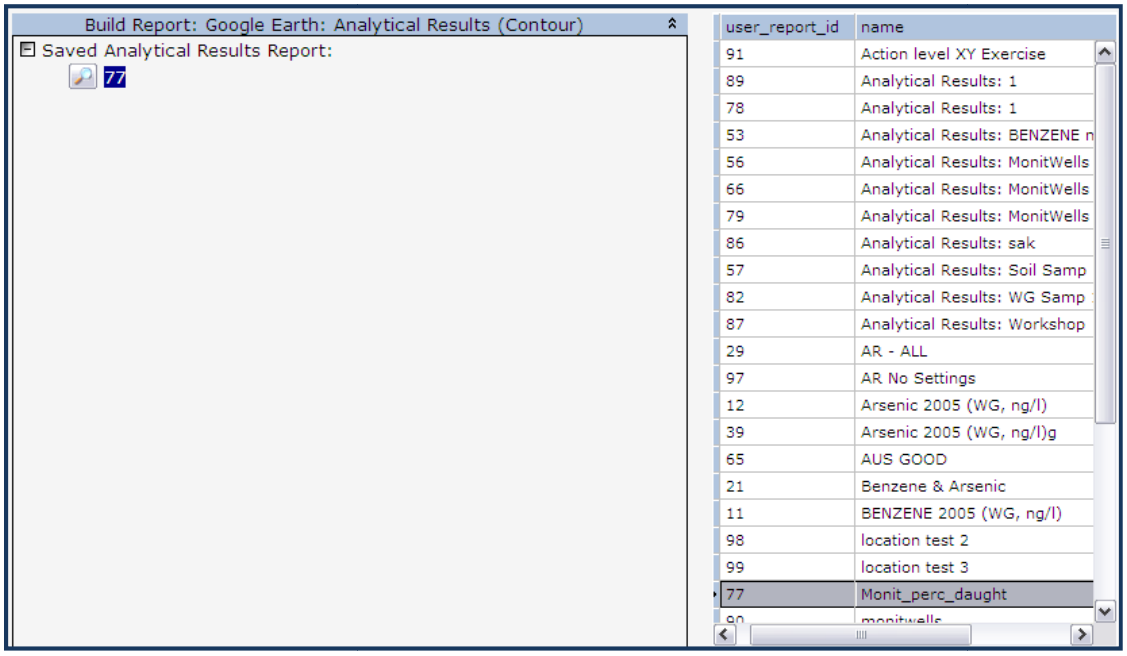


Figure 16: Selecting a Saved Report

6. Click the **Report** button to export to Google Earth.

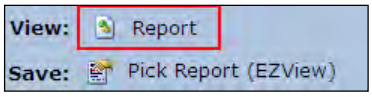


Figure 17: Report Option to Export to Google Earth

7. Save the exported .**kmz** file to the Desktop or, export directly to Google Earth.

If installed, Google Earth launches automatically.

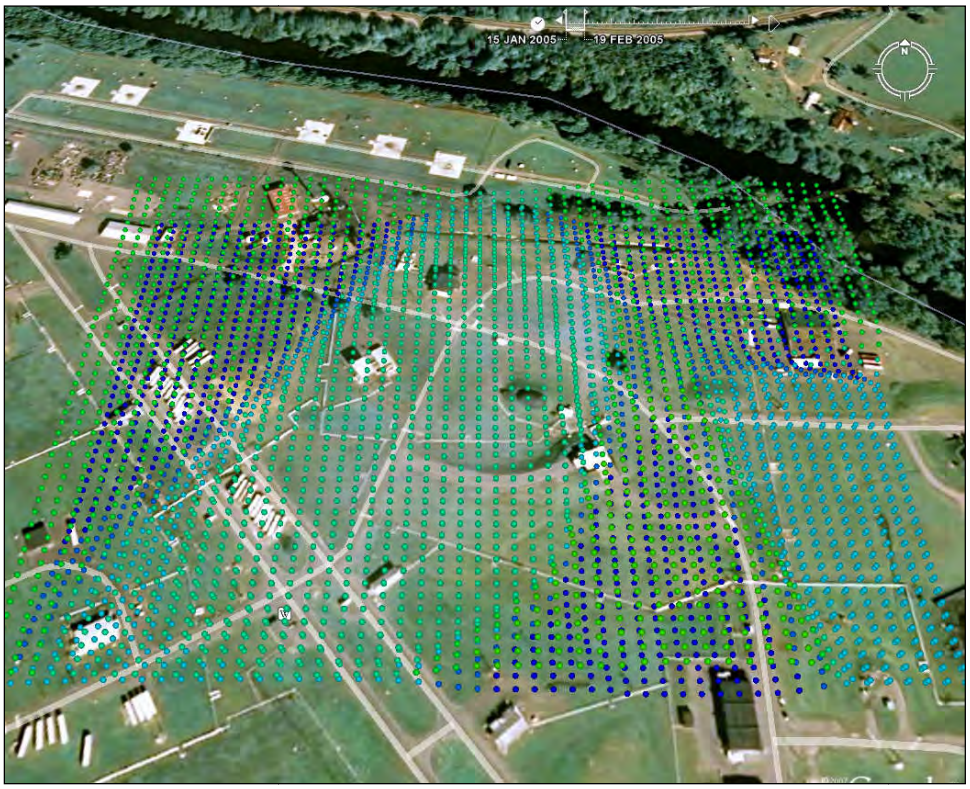


Figure 18: Google Earth Exported Report Results

*Exporting to *.shp file*

This exercise shows users how to export a ArcGIS shapefile. This allows the data to be graphically imported into ArcGIS.

This exercise uses the *Analytical Results Report*.

1. Build an *Analytical Results Report*.
2. Click on the **Enterprise EZView** tab located on the left hand side of the screen.
3. Click **Build Reports** to display a list of custom reports.
4. For this analytical results report, select the following parameters:
    a. **Location Group:** MonitWells
    b. **Sample Type:** N
    c. **Matrix(es):** WG
    d. **Analytical Group:** Perc Daughters

5. Click the **Shapefile** button to download and save as a shapefile. This will download the shapefile and ancillary files to a directory specified by a user. The shapefile can then be imported into ArcGIS.

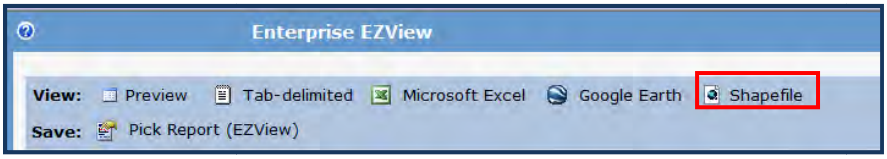


Figure 19: Shapefile Menu Option

Enterprise EZView- Pick Reports and Environmental Information Agents

Enterprise **Environmental Information Agents** (EIAs) are reports that are auto-generated when certain events occur, such as the exceedance of an Action Level, a specified date, or new data arriving to the system. These reports are generated based on saved, pre-selected parameters of reports, called **Pick Reports**. In this exercise, we will learn how to create Pick Reports and schedule EIA reports to be sent to specified users.

This exercise assumes you have already completed the ***Building Reports and Exporting Data*** exercise.

Note: Only users with the Enterprise "Manager" role have access to in Enterprise EZView's Build Reports, Pick Reports, and EIAs.

Pick Reports

Pick Reports are reports with specific saved parameters defined by the user. Pick reports are stored in the database and available to all users subscribed to the facility.

To Build and Make Changes to a Pick Report:

1. Login to Enterprise as a Manager.
2. Select the **Enterprise EZView** tab to expand the list.
3. Select **Build Reports.** The Build Reports list is now displayed on the main portion of the screen.
4. Expand the node next to Build Reports to show the list of all reports available in Enterprise.
5. Select the **Analytical Results** report.
6. The parameter selection screen will open. Make the following selections by clicking the spyglass under each parameter:

Parameters	Selection
Location Group	Monitwells
Sample Matrix	WG
Result Analyte Group	_Perc Daughters
Result Unit	ug/l

7. To save the selections as a pick report, select **Save: Pick Report (EZView)** from the toolbar.

   The **Enterprise EZView- Pick Report** screen will open and the newly created Pick Report is listed under **My Pick Reports** as *Analytical Results: 1.*

8. Single-click on the new pick report to highlight it.

9. On the right-hand side of the screen, select to make the report available in **All of My Facilities** by selecting the corresponding radio button.

10. With the report still highlighted, find the **Tools** menu from the right-hand side of the screen to rename the report. Select **Rename** and rename the report to *<Your Initials> Analytical Results: MonitWells PercDaughters* to make the report easily recognizable.

11. Click off the report to reflect the changes.

Deleting Reports:
Users may delete a report from the list of available Pick Reports by single-clicking the report and selecting **Delete** from the **Tools** menu on the right-hand side of the screen. However, Pick Reports with associated EIAs (as discussed in the next section) cannot be deleted without first deleting the EIA.

12. To View the saved pick report, single-click on it and select **View Pick Report (EZView)** from the **Tools** menu on the right-hand side of the screen.

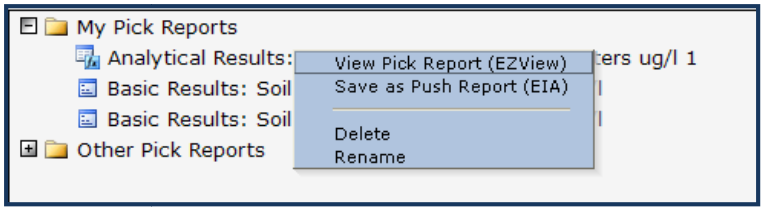


Figure 20: Viewing a Pick Report

13. Preview the output of the saved pick report with the pre-defined parameters by selecting **Preview** from the **View** ribbon. The preview of the report is then displayed below the Pick Report parameters list.

14. Edit the date range of the Pick Report by returning to the **View Pick Report (EZView)** screen and expanding **Sample** and **Date** nodes.

15. Select **End Date** and change the date to March 23, 2000 from the calendar on the right-hand side of the screen.

16. To save any changes made, select **Pick Report (EZView)** from the **Save** toolbar.

Note: The date range can be set to be relative. For example, if an **End Date** of '*Today*' and a **Start Date** of '*1 Year Ago Today*' are selected, the dates are all relative to the current date anytime the report is run from the saved Pick Report.

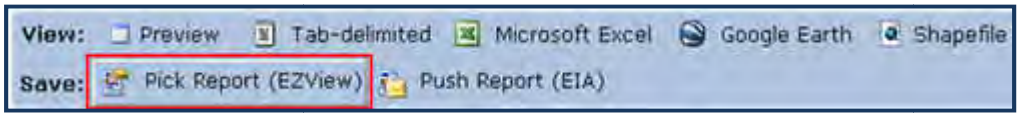


Figure 21: Saving Changes to a Pick Report

Environmental Information Agents (EIAs)

Environmental Information Agents (EIAs), found under the Enterprise EZView list bar, allow users to run Pick Reports when known conditions occur. These conditions include, but are not limited to: When a new EDD is submitted via Enterprise EDP; when a user schedules a report to be generated on a daily, weekly or monthly basis; or when a new EDD is submitted via Enterprise EDP and it exceeds an Action Level.

Building an EIA

1. Log into Enterprise as a Manager.

2. Select the **Enterprise EZView** tab.

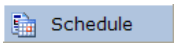
3. Select **Pick Reports**.

4. Single-click on the Pick Report from the previous exercise on the main Pick Reports screen.

5. Select **Save as Push Report (EIA)** from the Tools menu on the right-hand side of the screen.

Figure 22: Pick Report Context Menu

Scheduling an EIA

1. In the Enterprise EIA screen, click on **Schedule**. 

2. Select when the scheduled Information Agent should run:
   a. **Daily**
   b. **Weekly** on a specified day
   c. **Monthly** on a specified date
   d. **Every** specific number of days, beginning on a specified date

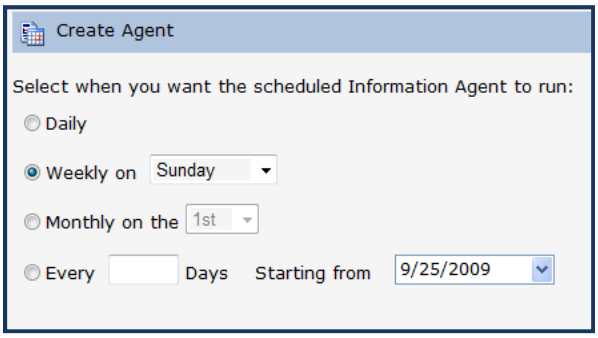
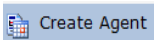


Figure 23: Schedule Menu

3. Select **Create Agent**. 

4. On the Enterprise EIA screen, single-click on the new agent created to highlight it and display the Information Agent Details on the right-hand side of the screen.

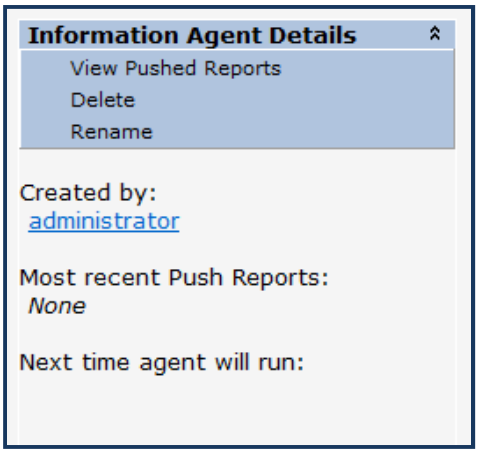


Figure 24: Schedule Information Agent Details

5. Expand the node next to the created agent to display all of the corresponding Push Reports. Single-click on one of the push reports listed to display the **Push Report Details**.

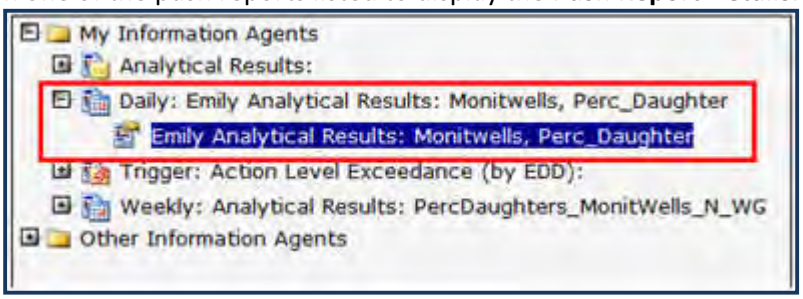


Figure 25: Scheduled EIA and Related Push Report

6. Determine the delivery of the Push Report is by selecting **Everyone Subscribed to Facility** instead of **Only Me** from the **Deliver** to section.

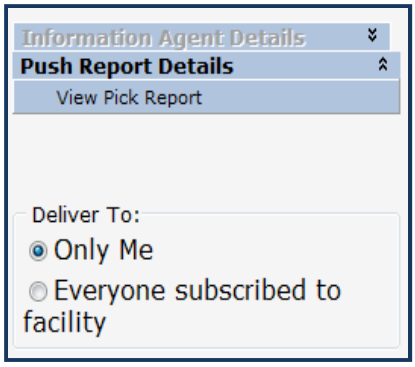
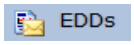


Figure 26: Push Report Details

EDD EIAs

1. To create a different type of Environmental Information Agent, click on **Pick Reports**.
2. Right-click on the Pick Report from the previous exercise in the right-hand pane.
3. Select **Save as Push Report (EIA)**.
4. After right-clicking on a saved Push Report, click on **EDDs**. 

5. An EIA will be created which delivers a Push Report every time a new EDD arrives via Enterprise EDP. Single-click on the created Information Agent to view the **Information Agent Details**.

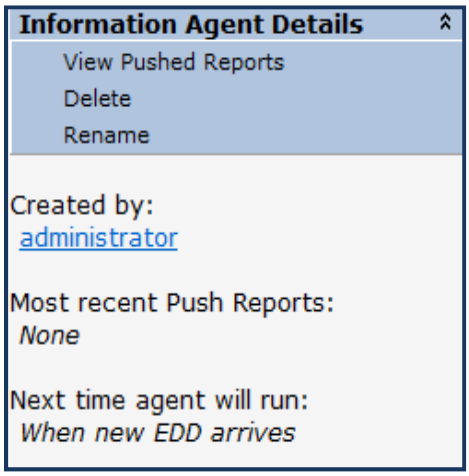


Figure 27: EDD Information Details

6. Expand the node next to the created agent to display all the corresponding Push Reports. Single-click on one of the push reports listed to display the **Push Report Details**.

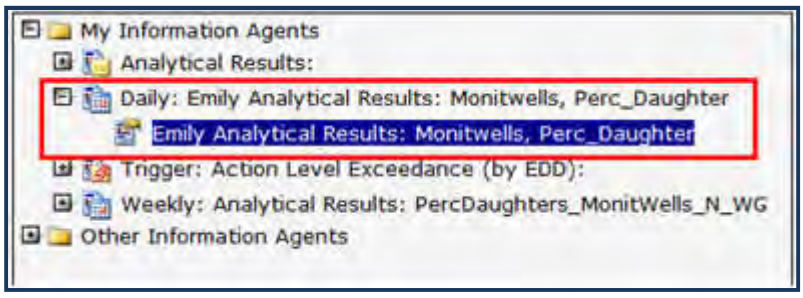


Figure 28: EDD EIA and Related Push Report

7. Limit the report that is generated to only displaying new data by checking the appropriate box. If this box remains unchecked, the generated report will display all data matching the previously defined criteria.

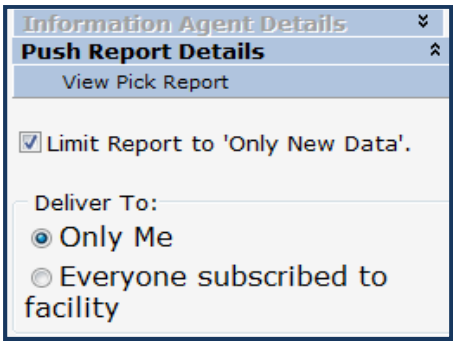


Figure 29: EDD Push Report Details

TRIGGERED EIAs

1. To create a triggered EIA, click on **Pick Reports**.

2. Right-click on the Pick Report from the previous exercise in the right-hand pane.

3. Select **Save as Push Report (EIA)**.

4. After right-clicking on a saved Push Report, move the mouse over **Trigger**. There are several options when setting up a Trigger EIA:

    a. **Self-Trigger-** When an EDD is submitted and accepted via Enterprise EDP, if the data in that EDD meets the requirements of the saved Pick Report and returns data, the report will then be generated based on this trigger.
    b. **Action Level Exceedance (by EDD)**- When an EDD is accepted by Enterprise EDP, this trigger will run to determine if the data contained in the EDD exceeds the **selected Action Level**.
    c. **Analyte Exceedance**- This trigger will run if the EDD accepted by Enterprise EDP returns results from the defined in an Analyte Exceedance Report.
    d. **Location Parameter Exceedance**- This trigger will run if the EDD returns results defined by a Location Parameter Exceedance Report.
    e. **Sample Parameters (Exceedance)** - This trigger will run if the EDD returns results from the defined in a Sample Parameters (Exceedance) Report.

5. Select **Action Level Exceedance (by EDD)**.

6. Click on the spyglass icon under **Action Level** and select **CLEANWATER INDUST**. The submitted EDD will be tested against this Action Level.

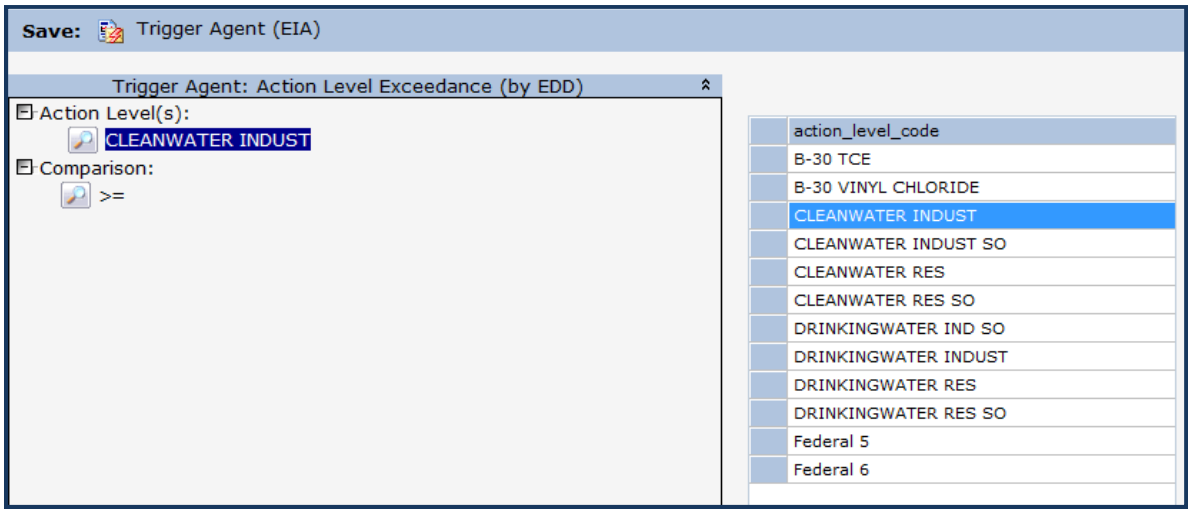
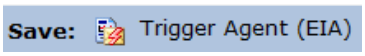


Figure 30: Setting up an Action Level Exceedance (by EDD) Trigger

7. Select **Save: Trigger Agent (EIA)**. 

8. On the Enterprise EIA screen, single-click on the new agent created to highlight it and display the **Information Agent Details** on the right-hand side of the screen.

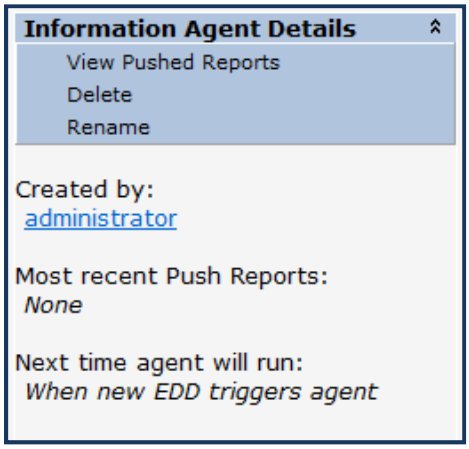


Figure 31: Trigger Information Agent Details

9. Expand the node next to the created agent to display all the corresponding Push Reports. Single-click on one of the push reports listed to display the **Push Report Details**.

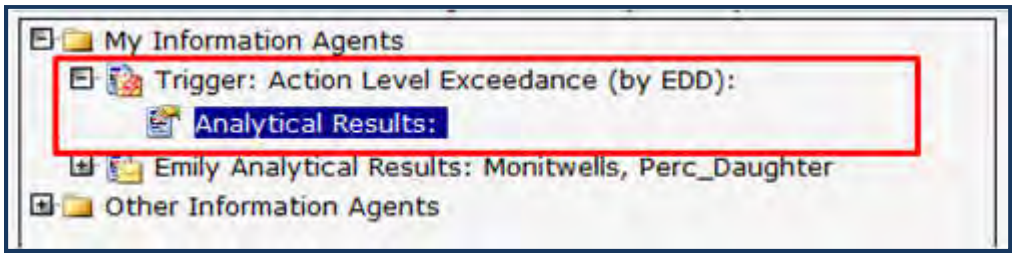


Figure 32: Trigger EIA and Related Push Report

10. Limit the report that is sent to only displaying new data by checking the appropriate box.

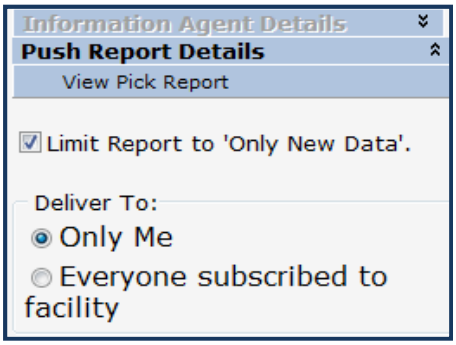


Figure 33: Trigger Push Report Details

Document Manager

The Enterprise Document Manager (Docs & Photos) allows the user to upload documents, associate them with a specific facility as well as a specific location within that facility. The purpose of this exercise is to guide users through the upload process.

Uploading Documents Using the Document Manager

1. Log into EQuIS Enterprise, and log into the **Metal Plating Facilities**.

2. Expand the **Docs & Photos** list bar.

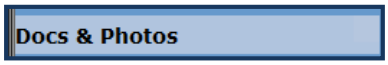


Figure 34: Docs and Photos List Bar

3. Select **Upload**.

Figure 35: Expanded Docs and Photos List Bar

4. After selecting **Upload**, the right pane will open up the document upload form.

5. For the purpose of this exercise, let's assign the following values:

Facility	Metal Plating Facilities (SQL)
File	Browse to and image file for the well
Title	Name the Image File "Well_B-30"
Author	Enter a name for the author
Date	Enter a specific date or use current date
Location	This drop down allows the assignment of a location. 'B-30'

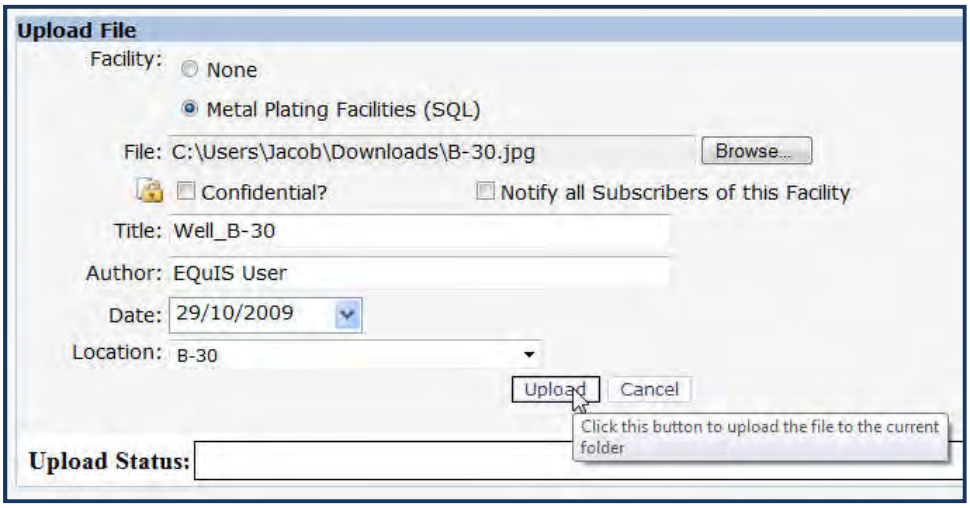


Figure 36: Upload File Options

6. After the details have been filled out, click the **Upload** button. Once the upload is complete, a list of uploaded documents will be available.

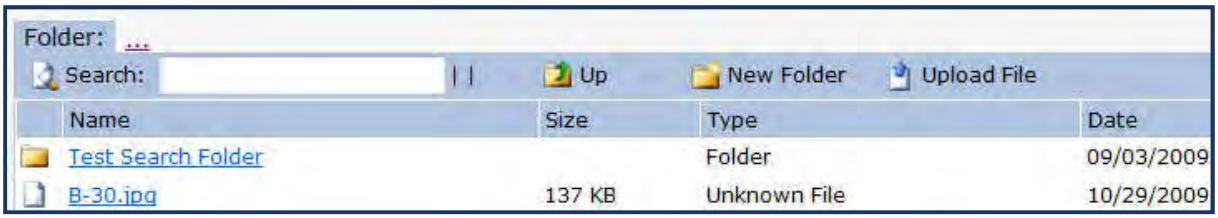


Figure 37: Expanded Docs and Photos List Bar

7. To delete items, select the row and press the **delete** key on the keyboard.