

EMRS Disease Management Toolkit System Navigation Exercises



United States
Department of
Agriculture

EMRS System Navigation Exercise

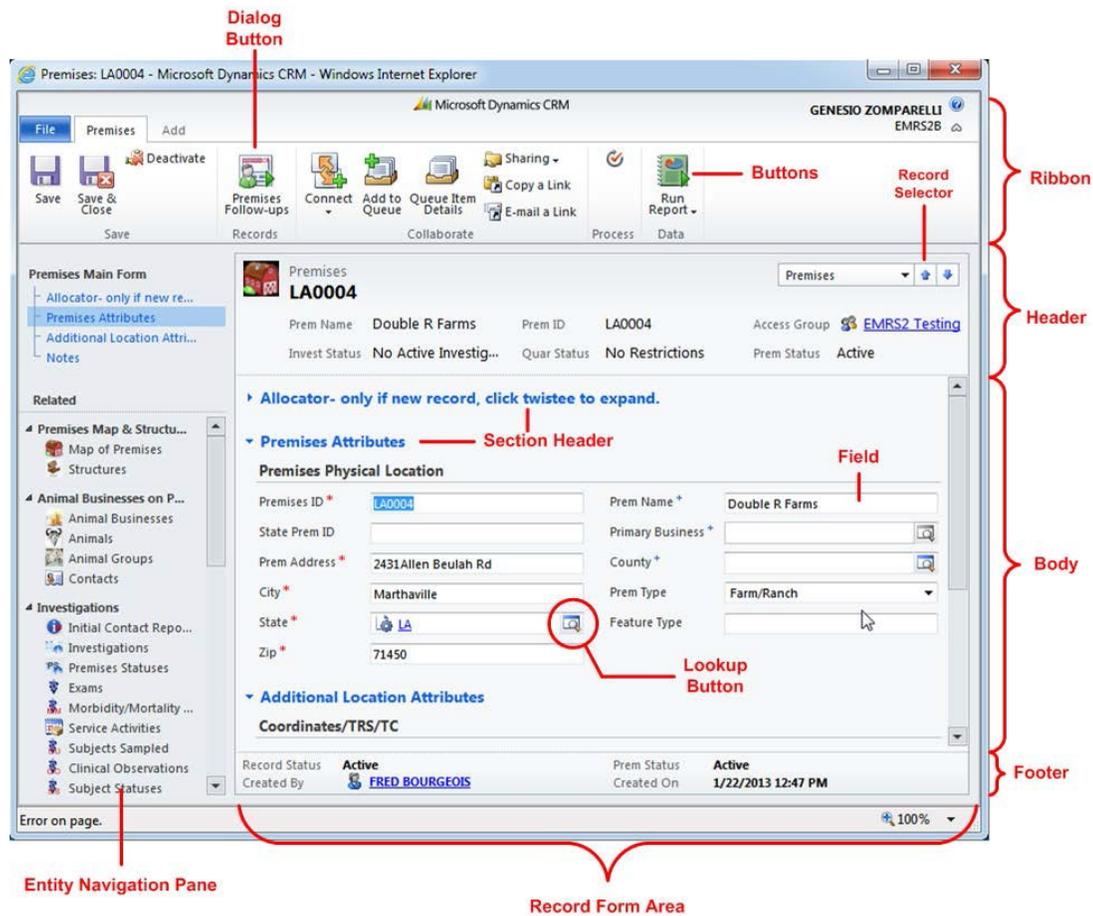
- 1) Login to EMRS2 Training (url: <https://emrs2t.aphis.usda.gov/main.aspx>)
- 2) Review the items on the Home Page.
- 3) In the Navigation Pane on the left side of the screen, select Disease Management and then Premises.
- 4) Review the screen to identify the items in the screen shot below. If it is not already visible, click to view the Chart at the right side of the screen.

The screenshot displays the Microsoft Dynamics CRM interface for EMRS2B. The interface is annotated with red lines and labels identifying key components:

- Application Areas:** The top navigation pane includes 'My Work', 'Premises/Producers', 'Investigations', and 'Movements & Tracing'. The 'Premises/Producers' area is expanded to show 'Premises', 'Animal Businesses', 'Contacts', 'Animals', 'Animal Groups', and 'Structures'. The 'Entities' label points to this list.
- Entity Navigation Pane:** The left sidebar contains 'EMRS2 Home', 'Disease Management', 'Knowledge Management', 'Enterprise Reporting', and 'Settings'.
- View Selector:** Located above the grid, it shows 'Premises: Active Premises'.
- Grid:** A table of premises records with columns for Prem ID, Prem Name, Prem Type, and Primary Operator. The record for 'LA0004 Double R Farms' is selected.
- Index Bar:** A horizontal bar below the grid showing the current page (1) and total records (53).
- Chart:** A pie chart on the right titled 'Active Prefs by State' showing a single slice for 'LA'.
- Ribbon:** The top ribbon contains tabs for 'File', 'Premises', 'View', 'Charts', and 'Add'. The 'Premises' tab is active, showing buttons for 'Edit', 'Deactivate', 'Premises Follow-ups', 'Connect', 'Add to Queue', 'Share', 'Copy a Link', 'E-mail a Link', 'Follow', 'Unfollow', 'Run Report', 'Import Data', 'Filter', 'Export to Excel', 'Advanced Find', and 'Refresh View'.
- Quick Find:** A search box labeled 'Search for records' is located above the grid.

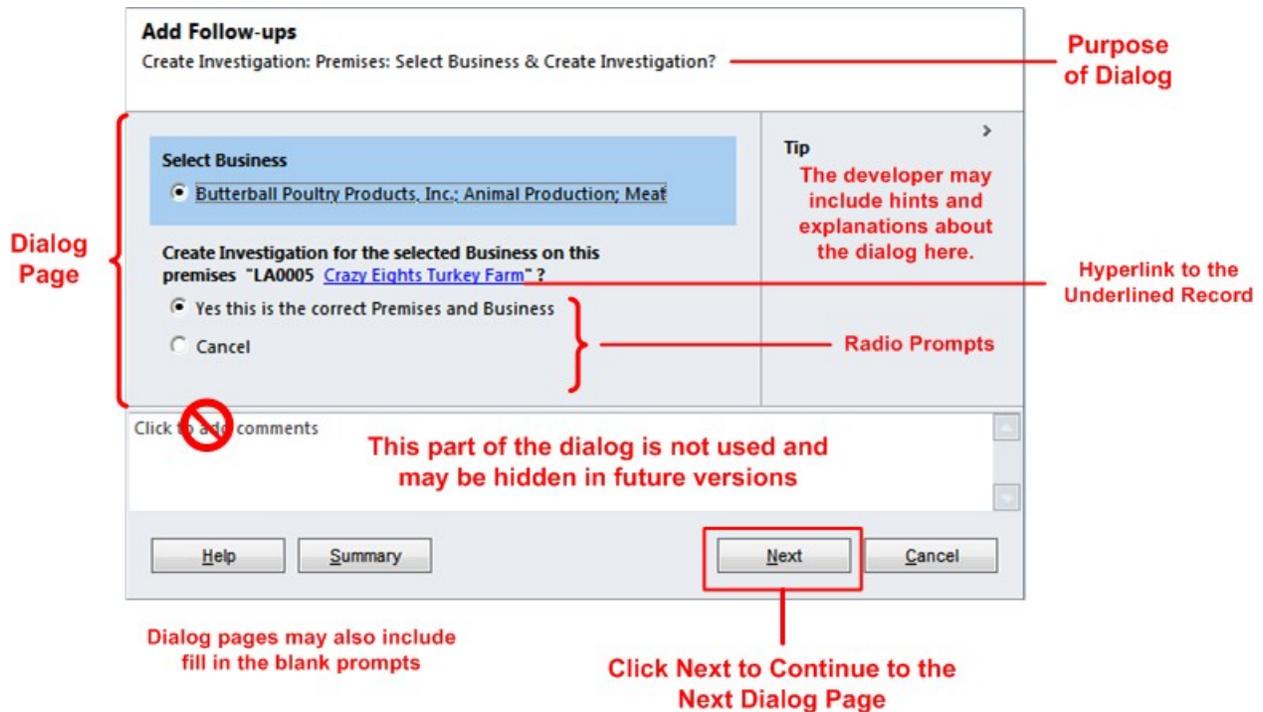
- 5) Experiment with making changes in the View Grid.
 - a. If desired, collapse the chart to see more of the grid.
 - b. Resize a column in the grid by grabbing the column line in the header and dragging (similar to resizing a column in Excel).
 - c. Note that you are viewing active premises. Use the View Selector to view inactive premises. Switch the view back to active premises.
- 6) Experiment with sorting items in the view grid.
 - a. Sort by one column: select a column by clicking the column header. Toggle in ascending/descending order by selecting the arrow that appears at the right side of the column.

- b. Sort by multiple columns: select the first column. Hold the shift key and select one or more additional columns to further sort (for example, sort by city and then prem type).
 - c. Return to the default View Grid by selecting Premises in the left Navigation Pane.
- 7) Use the Index Bar at the bottom of the screen to filter records to your city's first letter. First, sort by city by selecting the city column header. Then, select the appropriate letter for your city in the Index Bar.
 - 8) Use Quick Find to search for a specific record in your state. Enter search criteria in the search box. You can use an asterisk * for wildcard searches. Select the search icon.
 - 9) Select a record in the grid by **single** clicking in the row or selecting the check box to highlight the desired record in the grid.
 - 10) Open the premises form for the selected record by clicking on the highlighted premises id in the Prem ID column.
 - 11) Review the form to identify the items in the screen shot below.



- 12) Note the fields that use a Lookup Button. Experiment with how you would change the county field using the lookup in 3 different ways:
 - a. Select the lookup icon to open and select from the list.
 - b. Type all or part of the county name in the field and tab out of the field. If what you typed is a valid county in the lookup, the field will automatically fill or open the dialog box with choices that meet your typed information.
 - c. Begin typing a county you used in a) or b) to see it appear as a "recently used" drop down choice.
 - d. Close the form by selecting the red X or the Save & Close button to return to the premises View Grid.

- 13) Make sure your record is still highlighted in the view grid. Open a dialog by selecting Premises Follow-ups in the ribbon.
- 14) Review the first dialog screen to identify the items in the screen shot below (the dialog you open may look different than the screen shot below, but the identified parts will be the same).



- 15) Close the dialog without completing by clicking the red X or selecting Cancel. Answer "leave this page" in the pop-up warning.
- 16) If necessary, in the left Navigation Pane, select Disease Management and then Premises to view the complete list of active premises again.
- 17) Select the Refresh icon to be sure any changes are visible.
- 18) Select the Recently Visited icon (next to the home icon beneath the ribbon) to view records you have recently visited. Use the pin icon to select one record that you want to stay on the recently viewed list for easy access.

EMRS Adjust Settings

- 1) Follow the steps below to increase the number of items that appear in EMRS2 drop down lists. This will be important during later exercises.
- 2) From the EMRS Home Page, select File > Options.
- 3) In the General tab, change the number of Records per Page to 250.
- 4) Select OK.