eAgent 2.0 User Manual

Updated March 2019

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1 Introduction

This manual is designed to educate authorized personnel on the use of and describe the basic components of eAgent 2.0.

eAgent 2.0 is a full access web application that allows authorized personnel to send entries, inquiries, reports, and transmit CJIS data. This web-based application is compatible with the most modern operating systems and web-browsers, including mobile devices, and will not require an installation. It is also fully compliant with NCIC 2000 and NLETS. One of the main advantages to using eAgent 2.0 is its ability to automatically distribute updates to your device, therefore eAgent 2.0 will always be up to date.

Note: eAgent 2.0 works with each host agency to customize and meet the business needs of that particular user community. This manual is a general overview of the eAgent 2.0 application, therefore certain sections may not match exactly with the version of eAgent 2.0 that was specifically customized for your agency. However, this manual provides you with the necessary information to quickly become proficient at using the eAgent 2.0 application.

2 How to Access

eAgent 2.0 is a web application, therefore you must have a web browser and access to the host agency's secure intranet to use it. Follow these steps to access eAgent 2.0:

1. Open a Web Browser (Internet Explorer 11, Microsoft Edge, Safari, Mozilla Firefox, or Chrome).
2. Navigate to the eAgent 2.0 URL.
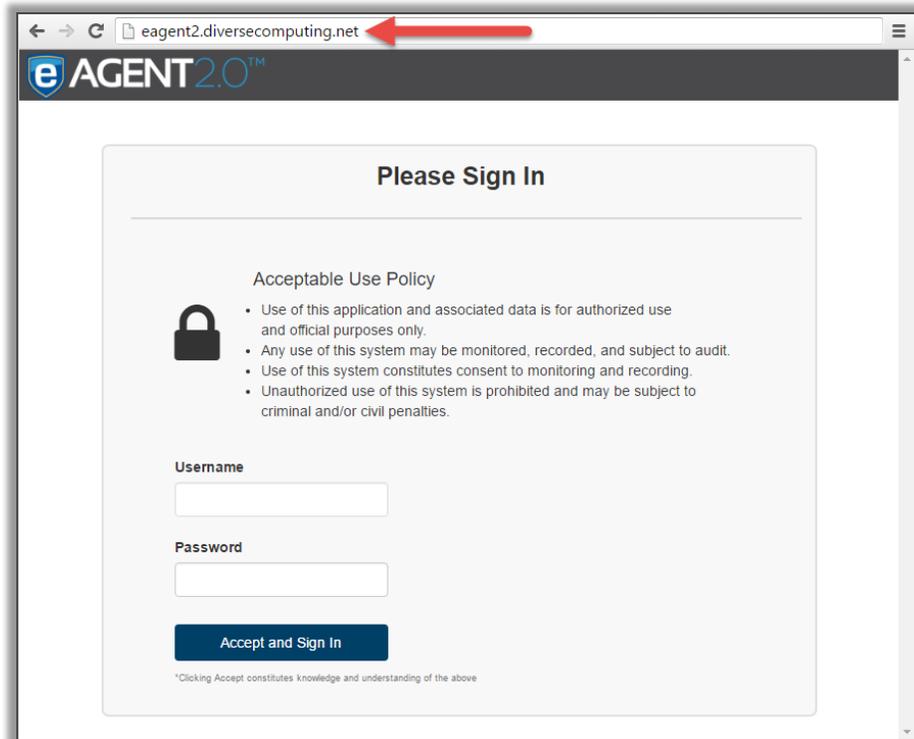
Browser highlighting eAgent 2.0 URL

2.1   Logging In

To begin, each authorized user must log in to the eAgent 2.0 application. Once you navigate to the eAgent 2.0 URL, a sign in screen will appear. Enter your eAgent 2.0 username and password into the sign in screen and click **Accept and Sign In**. If you are using the application for the first time, see your TAC to receive your login information.

You must share your location with the browser in order to have access to eAgent 2.0. If this is your first time accessing the application, select the **Always Share** option from the browser notification or edit your location settings in the browser settings menu. For more information on different browser location settings see the Appendix in section 10.3.
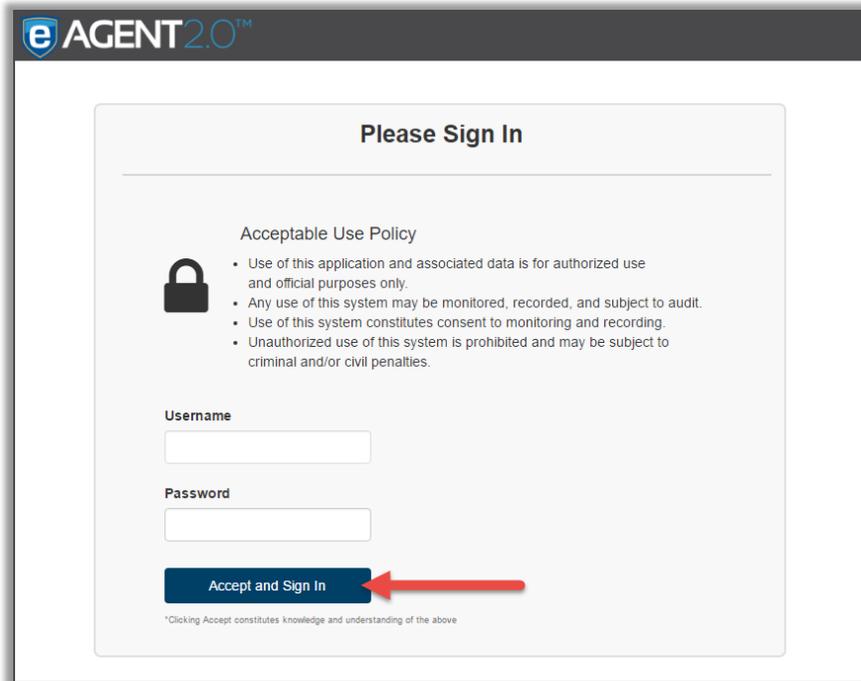
eAgent 2.0 sign in screen

The first time you log in to eAgent 2.0 the application will prompt you to accept the End User License Agreement. Read through the agreement and click **Agree and Continue**.
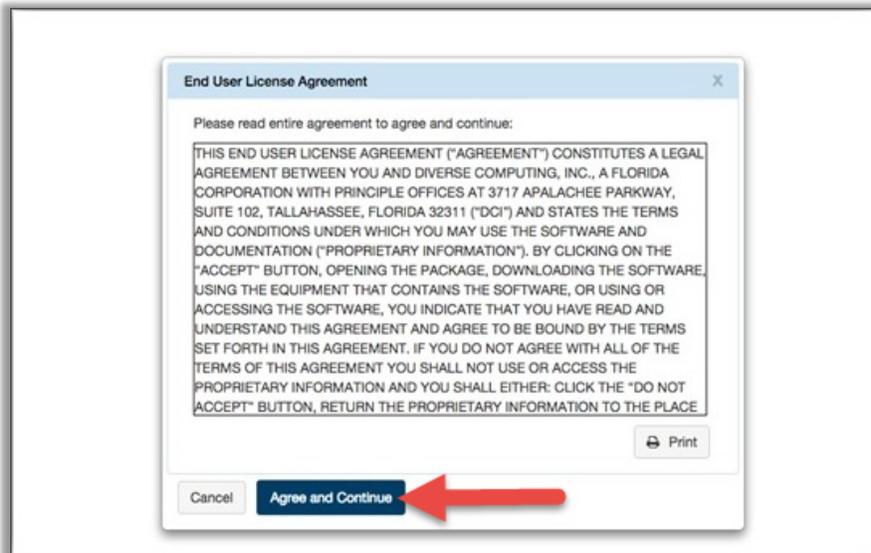
eAgent 2.0 End User License Agreement

2.2   Logging Out
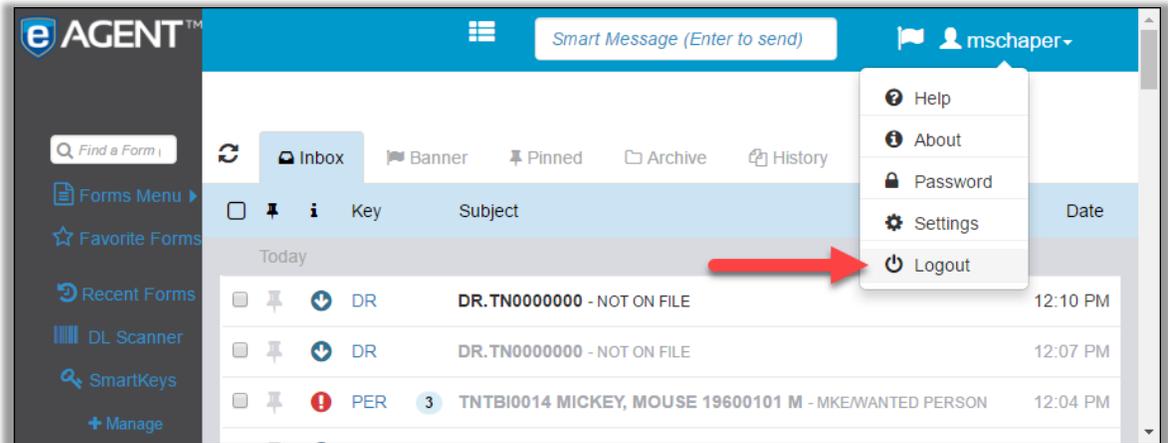
For security reasons, it is important to log out of your user account when you finish using eAgent 2.0. To log out:

1. Click on your username from the top right of the screen to view your **user drop-down menu**. Refer to section 3.7 for more information on the user drop-down menu.
2. Select **Logout**.
3. The page will redirect you to the Sign In screen.

User drop-down menu highlighting "Logout" selection

3 eAgent 2.0 Environment

The design of eAgent 2.0 functions similarly to an email inbox. All incoming messages display in a primary inbox tab and the additional tabs provide methods of organization. Review the following sections to become more familiar with the features of the application.

3.1   Inbox Tab

You can view all incoming message responses in the Inbox Tab. The message responses in this tab are organized chronologically using the section headings "Today", "Yesterday", and "Past". To navigate through messages in the Inbox use the up and down arrows (↑, ↓) on your keyboard. The check box to the left of the currently selected message will be outlined in blue.

Click on the refresh icon ($\mathcal{C}$) to the left of the Inbox tab to refresh the Inbox without refreshing the entire browser. If you refresh your browser and not the Inbox tab, it will cause you to lose any forms you have open.
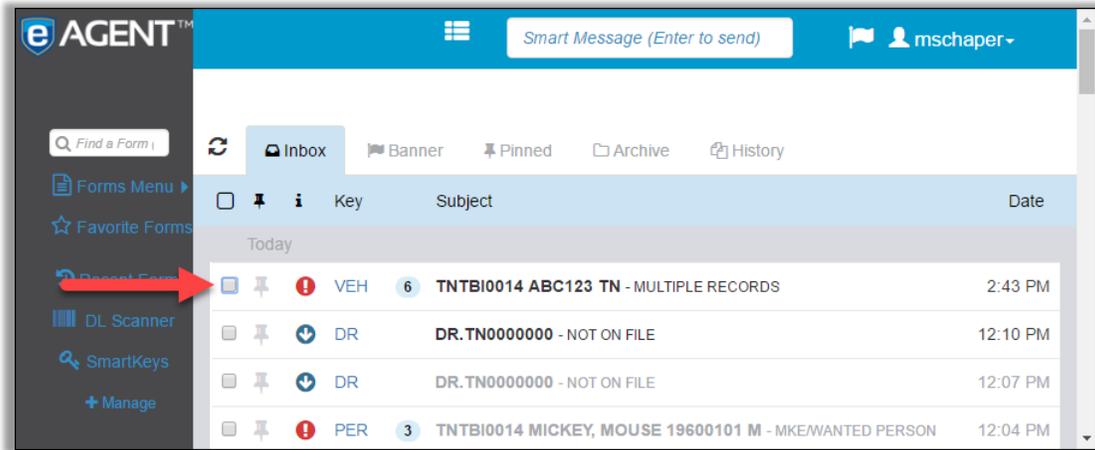
eAgent 2.0 Inbox highlighting selected message

Each message in the Inbox displays the message priority, MKE, message count, subject of the message, and the date the message was received. Messages that you receive for the current day will display the time instead of the date. The following describes the key components of each message:
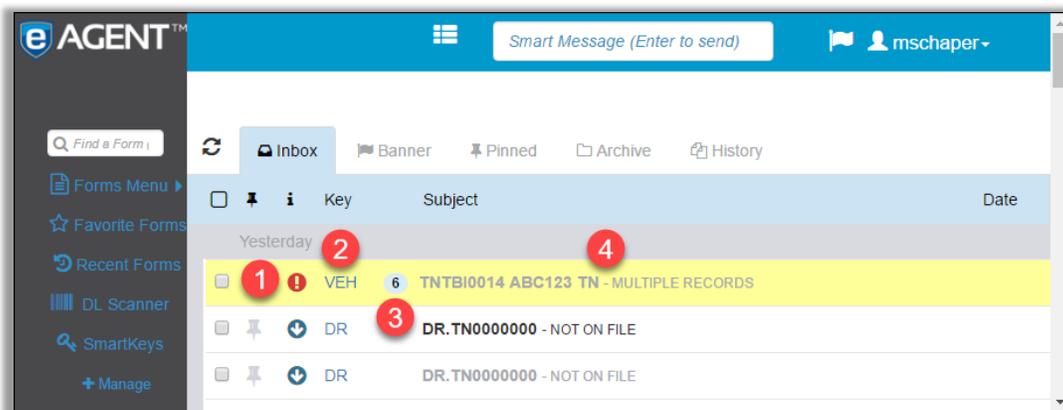

Inbox tab highlighting message subject components

1. **Message priorities** are represented by colored icons which display to the left of the MKE. These indicate low, medium, and high priority responses. Refer to section 3.7 for more information on these icons.
2. The **Message Key** displays to the left of the message count and shows the MKE of the form you have sent. With the exception of unsolicited messages, you can select the MKE of a message to open the form from the Inbox.
3. The **Message Count** will display to the left of the subject for messages with multiple responses. This shows the number of responses associated with a transaction but does not include the transaction itself.
4. The message **Subject** displays core information about the message. The example above shows "Multiple Records" for a message that had multiple responses. Other message subjects may display important information about the content of a message or refer to the priority of the message response.

3.1.1 Agency Mode

Activating Agency Mode causes users who are in the same agency to receive the same messages in their Inbox. This feature allows you to view and interact with any messages that the users in your agency send or receive. There will be minor changes to the Inbox display when Agency Mode activates.

The following section explains key components of transactions in Agency Mode:
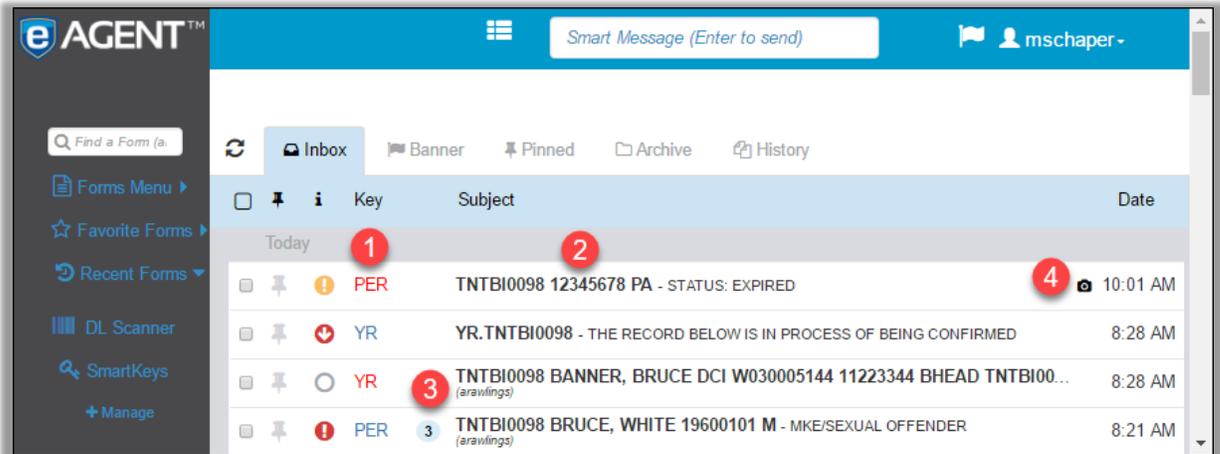

Agency Mode Inbox display

1. The **Message Key** of a message is highlighted in red when it is unread by all members of your agency group. The Message Key color will change to blue once someone in your agency group reads the message.
2. The message **Subject** is in bold black type when unread by you, even if someone else in your agency group has already read it. Once you open the message the color will change to grey.
3. The **Username** of the user who sent a transaction will appear beneath the subject of the message. Your username will not appear on transactions sent by you.
4. When you see a **camera icon** in the subject line of a message it indicates there is an image attached to the message response.

3.2   Archive Tab

If you choose to archive messages, they will appear in the Archive Tab and will no longer display in your Inbox.
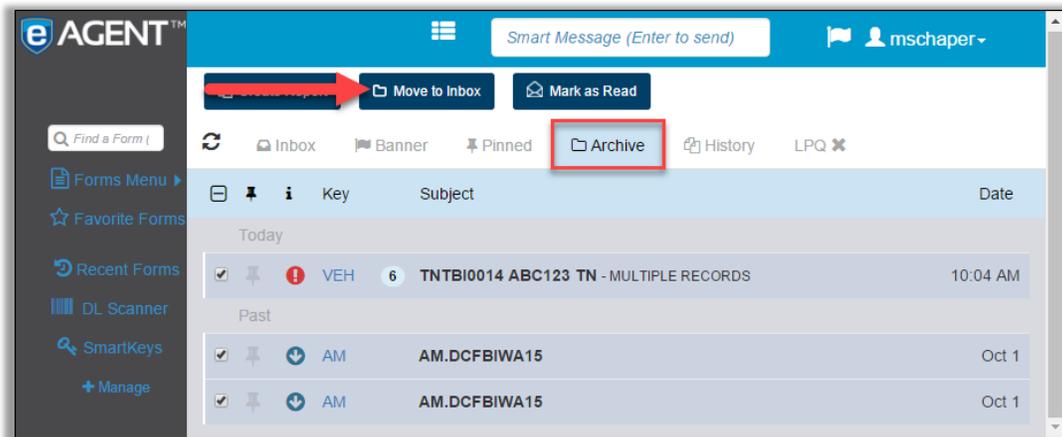
To move messages to the Archive Tab:

1. Check the boxes to the left of the messages you would like to move.
2. The buttons "Create Report" and "Move to Archive" will appear at the top of the Inbox. If you select any unread messages the "Mark as Read" button will also appear.
3. Select **Move to Archive.** You can then view these messages by selecting the **Archive** tab.
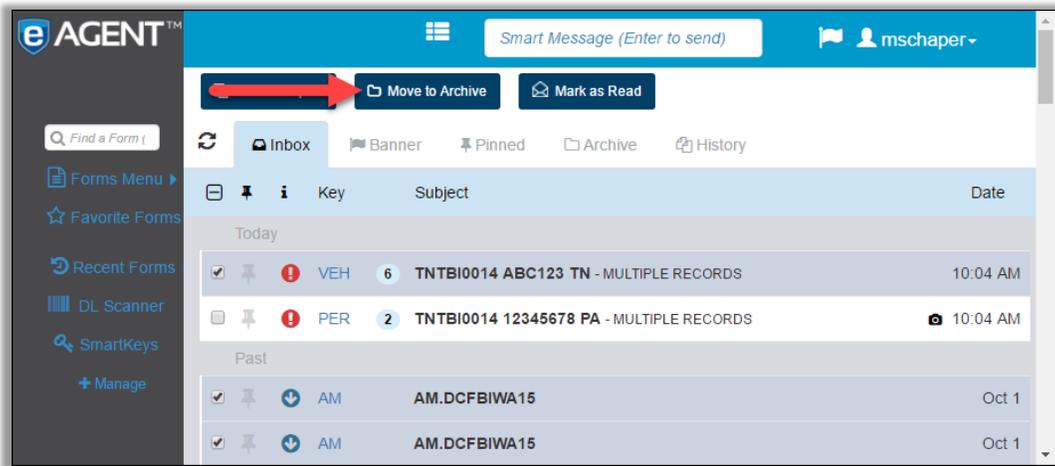
Inbox tab highlighting "Move to Archive" button

Once you are in the Archive Tab, you have the option to move messages back to the Inbox. Check the boxes for the messages you wish to move and select the **Move to Inbox** button at the top of the screen. The messages will disappear from the Archive Tab and reappear in the Inbox.
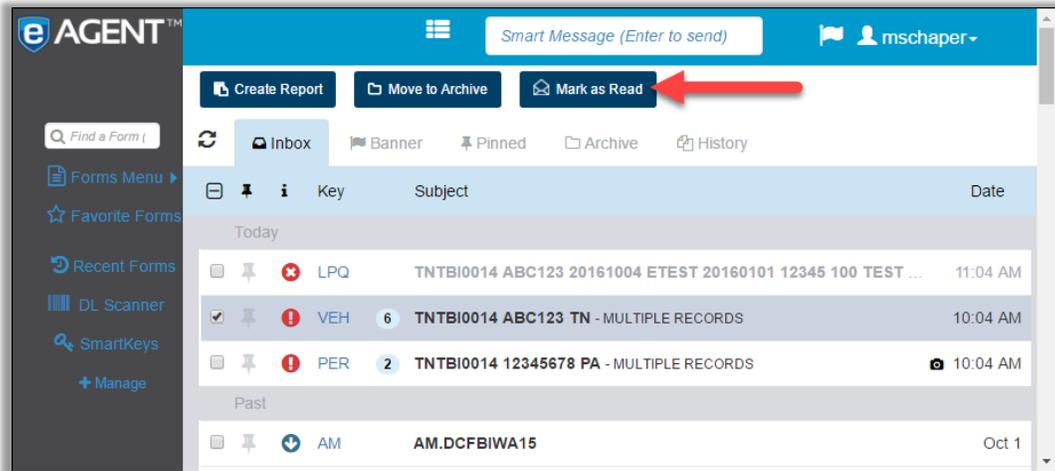

Archive tab highlighting "Move to Inbox" button

3.3   Mark as Read

To mark unread messages as read:

1. Check the boxes to the left of the unread message(s) you would like to mark as read.
2. Three buttons will appear at the top of the Inbox: "Create Report", "Move to Archive", and "Mark as Read."
3. Select **Mark as Read**. The message subject will change from bold black type to grey.

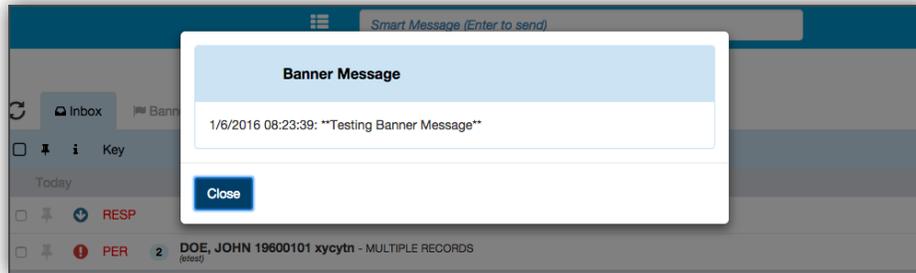*Inbox tab highlighting "Mark as Read" button*

3.4   Banner Tab

The **Banner Tab** displays all banner messages in the same format as messages in the Inbox tab.
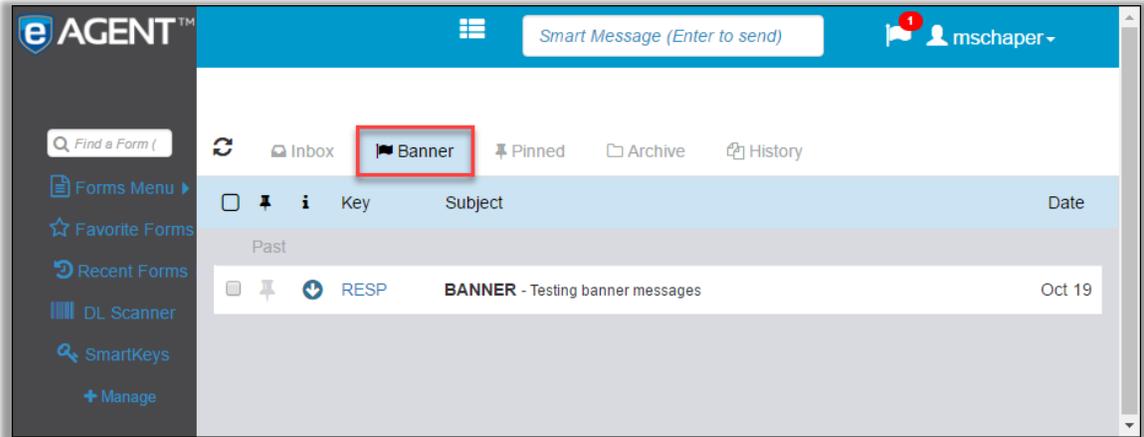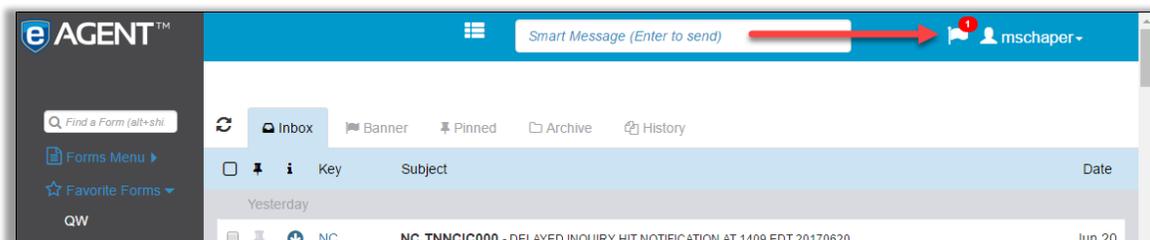

Banner tab selected

If you receive a banner message while you are using eAgent 2.0, it will display as a popup on your screen. Closing this popup will mark the message as read in the Banner tab.


Banner message popup

If you are logged out of the application, any banner messages you receive on the current day will display as a popup when you first log in. Banner messages you receive while logged out of the application on previous days will be stored in your Inbox as unread messages. A red notification on the banner icon in the top navigation bar will alert you to the number of unread messages in your Banner tab.
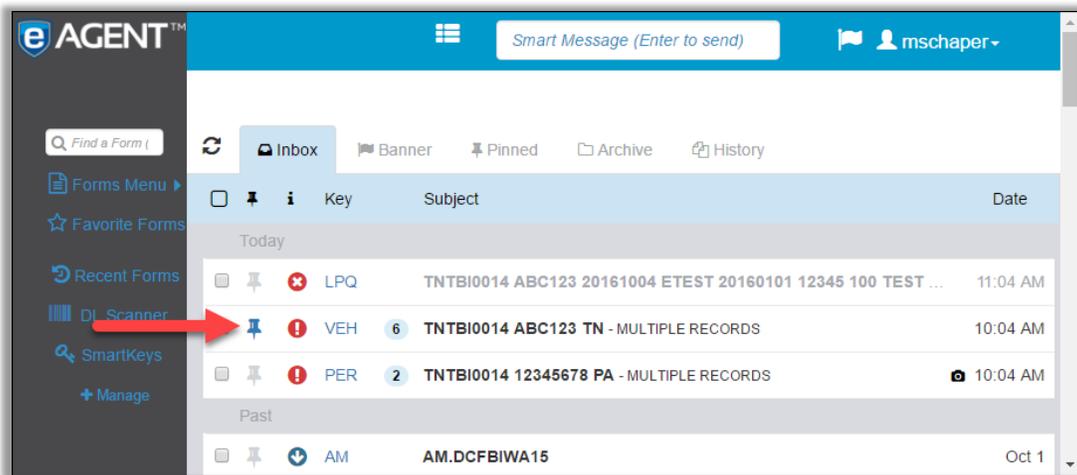

Banner icon notification

3.5 Pinned Tab

This tab displays messages you have pinned in your Inbox or Archive.
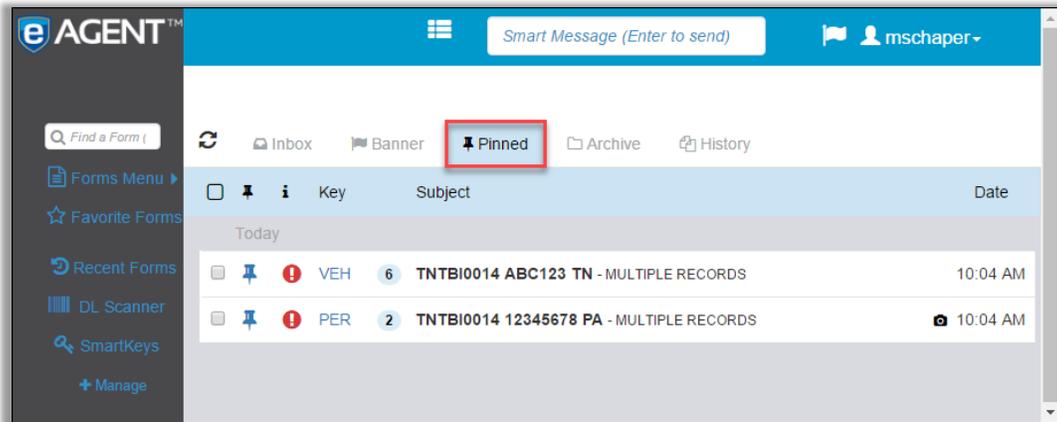
Pinned tab selected

To pin a message, click the **pin icon** to the left of any message in the Inbox. The icon will fill in blue to show that the message has been pinned.

*Inbox tab highlighting blue pin Icon*

To unpin a message, select the blue pin icon for any pinned message. The icon color will change back to grey, indicating that the message is not pinned.

3.6   History Tab

The History tab allows you to search through all your messages. You can narrow your search using the following search fields:

- Start/End date
- Start/End time
- Message Keys
- ORIs
- Text
- User Names

eAgent 2.0 will include archived messages and exclude unsolicited messages in your search by default. To change these settings, find the "Search Criteria" section while in the History Tab and check or uncheck the boxes next to **Include Archived** and **Exclude Unsolicited** before you click the search button.
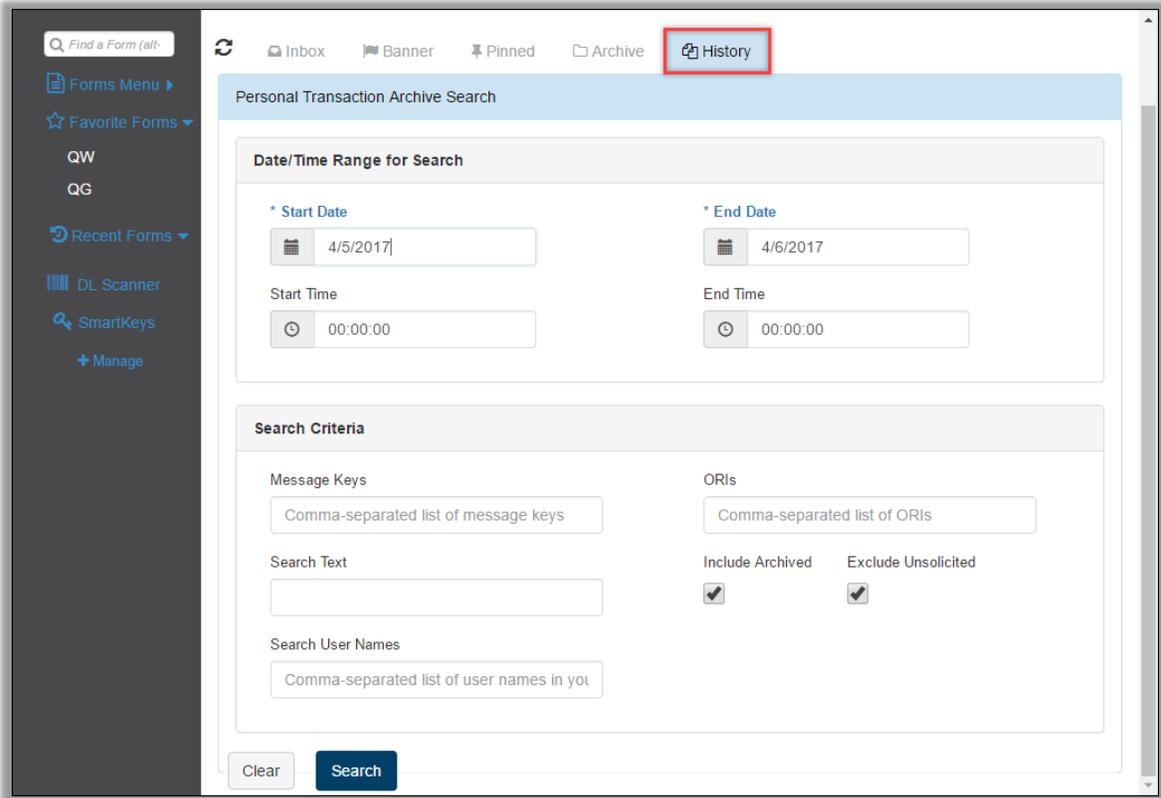
History tab

Enter your search parameters and click **Search**. A new **Results** tab will open listing all the messages that match your search, and the search parameters will display at the top. When you are not actively viewing a search results page, you can also view the parameters of a search by hovering your mouse over the Results tab. The application allows you to perform multiple searches at once, and each one will open in a new Results tab.
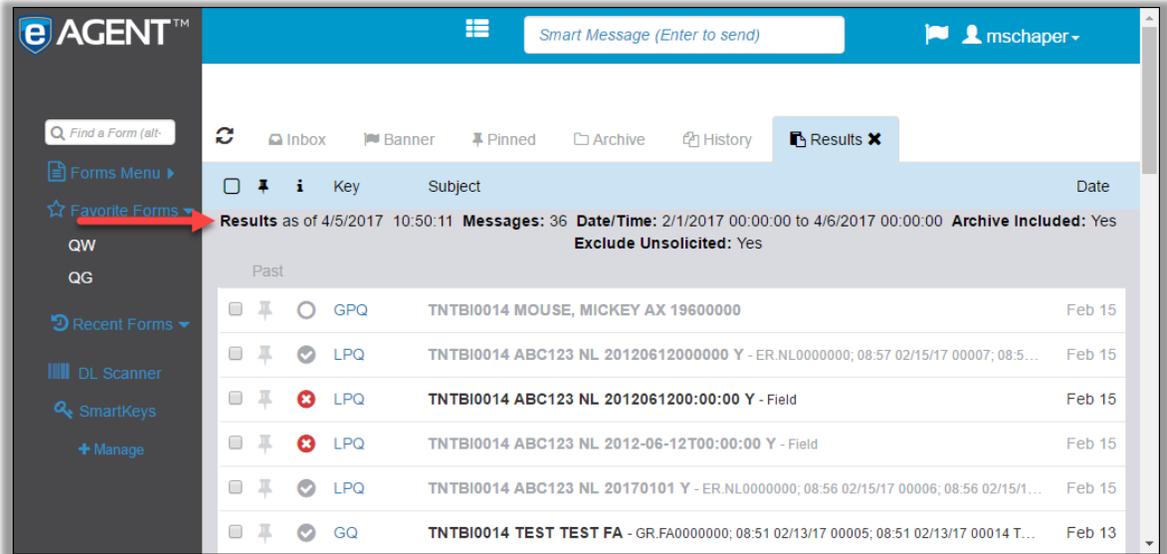

History search results page highlighting search parameters

3.7   User Dropdown Menu

The User Dropdown menu allows you to access several features within eAgent 2.0:

- eAgent 2.0 Help
- About
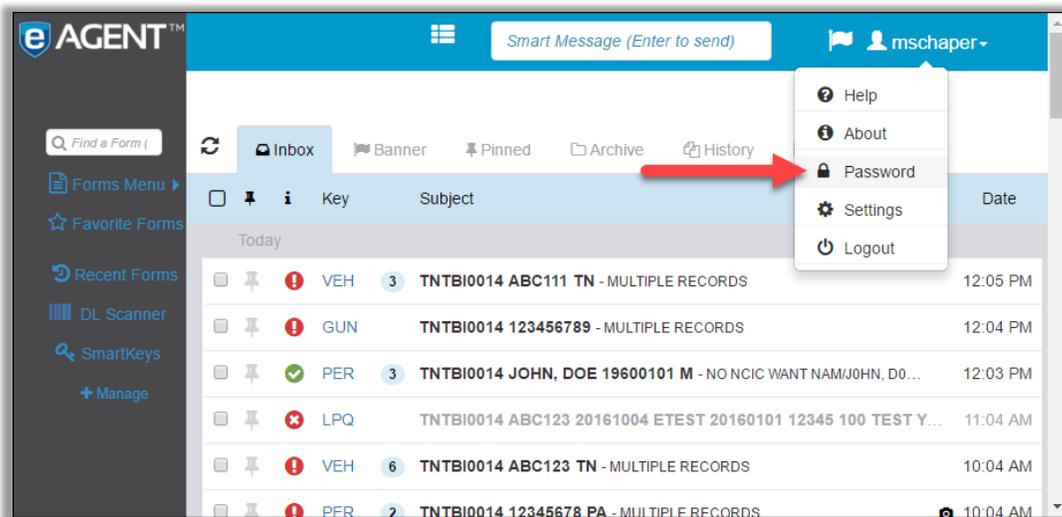- Change password
- User settings
- Logout

Click on your username in the top right corner of the application to view the dropdown selections. The dropdown will remain visible until you click on your username again.
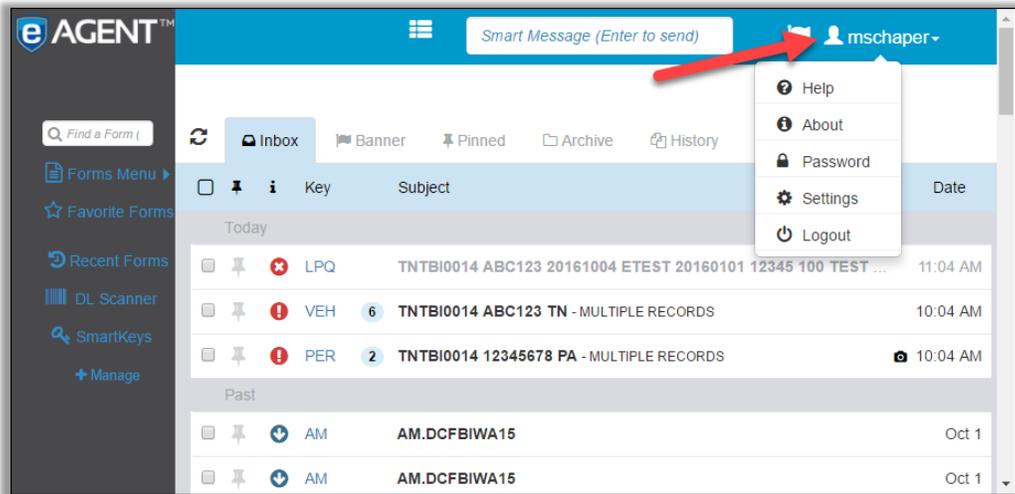
User dropdown menu highlighting username
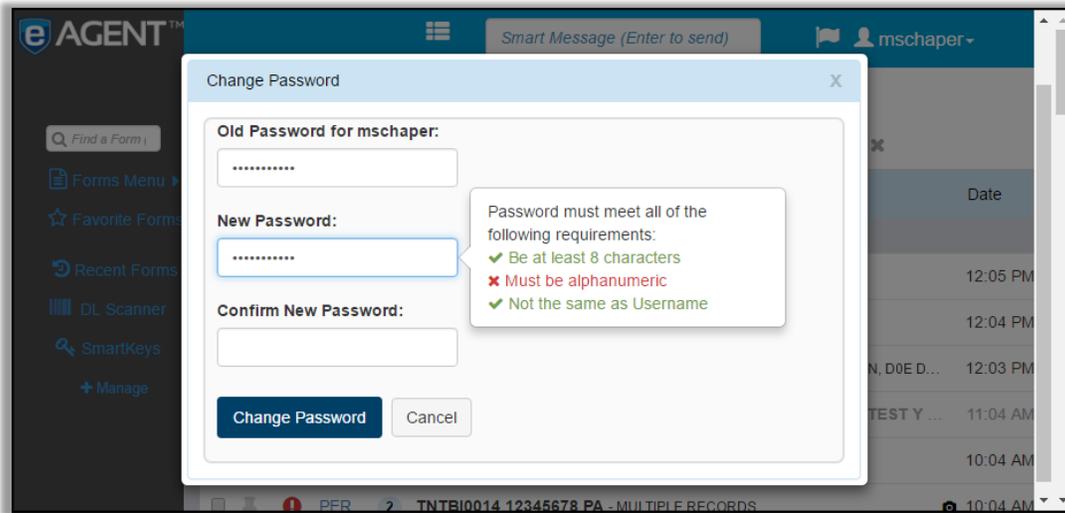
3.8   Change Password

Select **Password** from your user dropdown to create a new password.

User dropdown highlighting 'Password' selection

Your new password must meet specific password requirements:

- Must be at least 8 characters
- Must be alphanumeric
- Not the same as Username
- Not the same as your last 10 passwords used in eAgent 2.0

Change Password notification

Select Change Password and a confirmation message will appear on the screen. Use this password the next time you log in to eAgent 2.0.

3.9   Priority Icons

Priority Icons display to the right of the pin icon on messages in your Inbox. These colored icons indicate the priority level of a message. The following table describes what each icon represents:

Icon	Category	Priority	Description
Green Check	Response	Low	No Record
Yellow Exclamation	Response	Medium	No Registration or Expired
Red Exclamation	Response	High	Hit
Blue Arrow	Unsolicited	Low	AM Messages
Red Arrow	Unsolicited	High	YQ Messages
Red 'X'	Response	Error	Message Key Errors
Grey Check	Priority Not Configured		
Open Circle	NO RESPONSE		

You can find a similar detailed list in the eAgent 2.0 application by hovering over the "i" symbol in the inbox header.
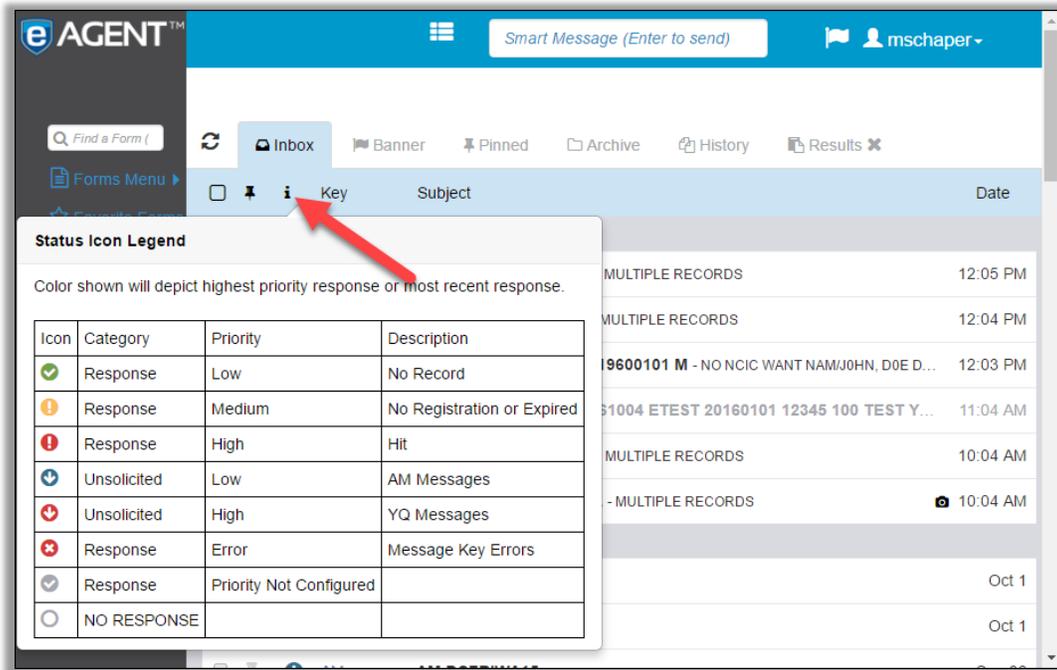
Status icon legend

See the Appendix in section 10.2 of this manual for a complete list of icons in eAgent 2.0.
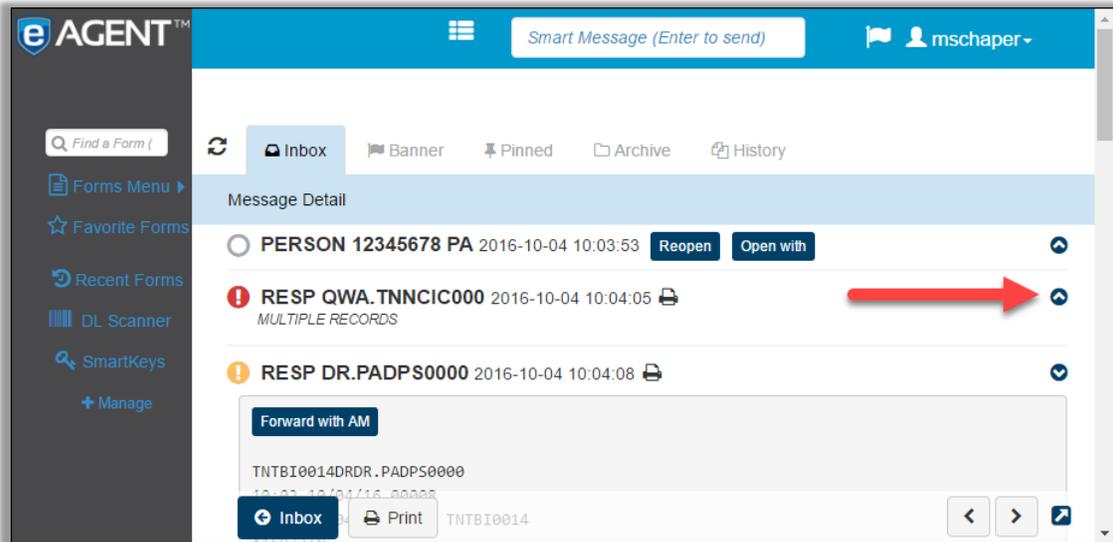
3.10 Message Detail

To view Message Detail, click on any message in your Inbox. When you select a message, the message detail will open in the Inbox tab. If you have the **Split View** setting turned on, the message will open in a new window (See section 3.10.1 for more information).

When you view message detail the transaction information will display first and all associated responses will appear below it.
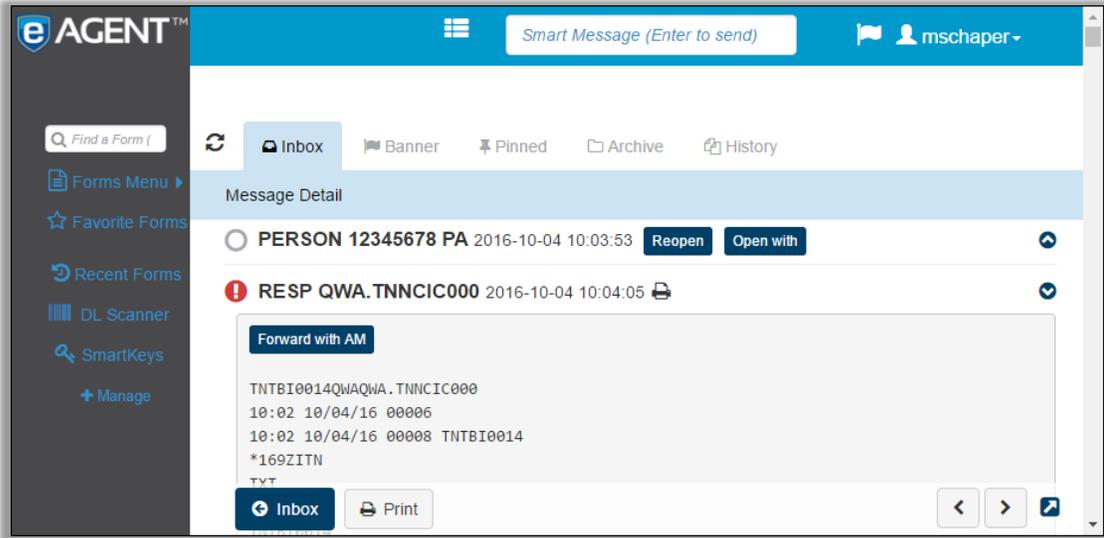

Message detail with multiple responses

You can collapse these responses by clicking on the arrow icon on the right side of the message detail header.

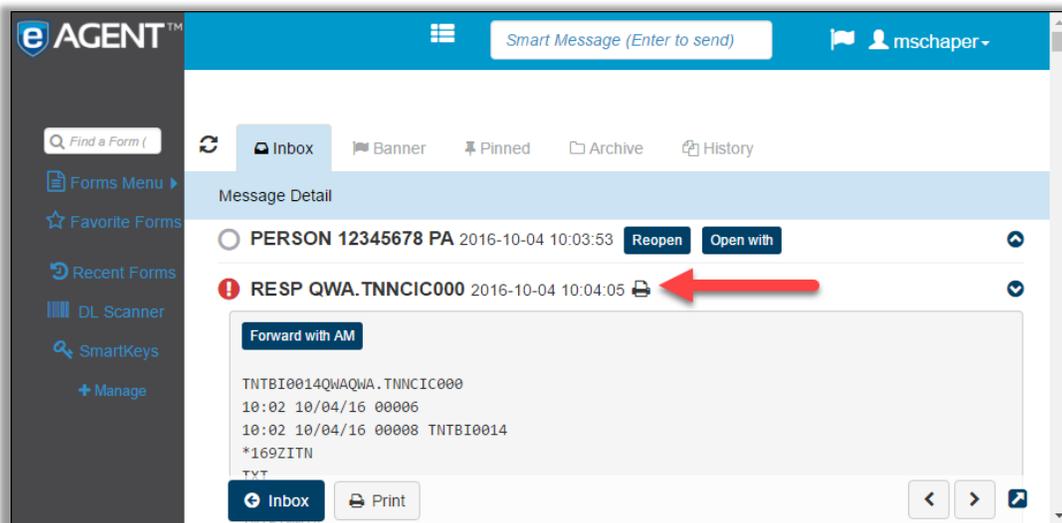*Message detail highlighting toggle arrows*

You can navigate through message details (in tabs) by selecting the arrows at the bottom of the message detail screen. This allows you to navigate through your messages without having to return to the Inbox.
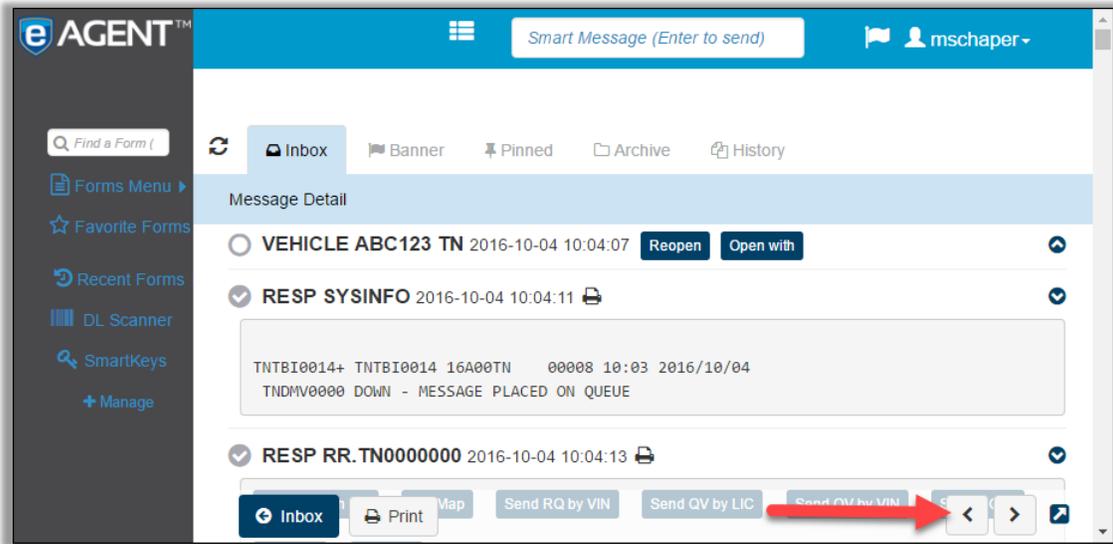
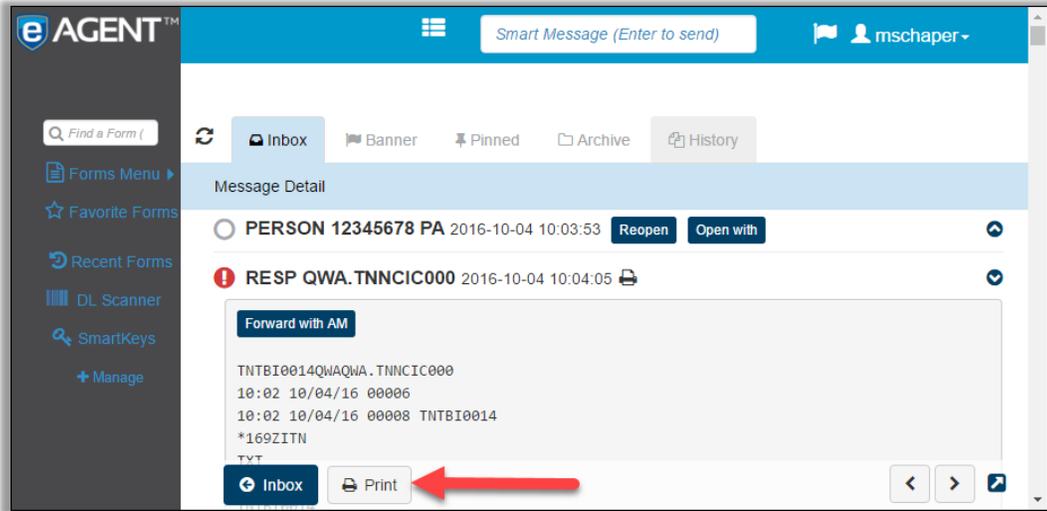*Message detail highlighting navigation arrows*

3.10.1   Printing the Message Detail

To print an individual response within a message detail page, select the printer icon next to the message heading.

*Message detail highlighting "Print Individual Response" icon*

To print all responses for a message that has multiple responses, select the **Print** button that floats at the bottom of the screen.

Message detail highlighting "Print" button

3.10.2   Highlighting

Highlighting that occurs within the message detail draws attention to information that matches with information that was included in the transaction search.
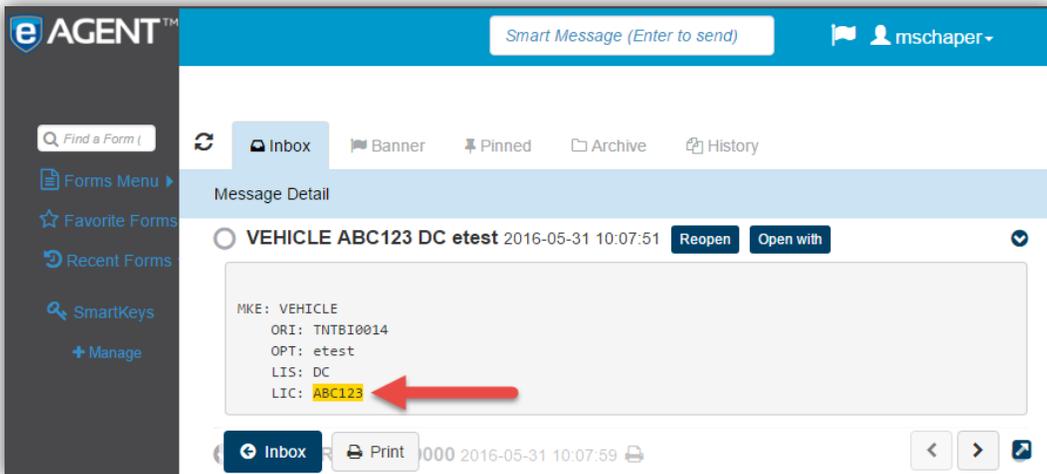
Message detail highlighting

eAgent 2.0 uses three different colors to differentiate between types of information when running transactions. The table below describes what each color refers to:

Color	Information Type
Gold	License Plate/VIN
Pink	Name
Purple	Date of Birth

3.10.3 eAgent Response Buttons

Response Buttons appear at the top of each message response and allow you to quickly take different actions on message information. To use message response buttons:

1. Select the message you wish to use from your Inbox.
2. You will see response buttons that directly relate to the type of message response you choose. For example, if you click a VEH response, you will see a **"Forward with AM"** button at the top of the message detail.
3. Click on the **"Forward with AM"** message response button. An AM form will open with information from the VEH message detail automatically populated in it.

More information on specific Response Buttons can be found in eAgent 2.0 help.
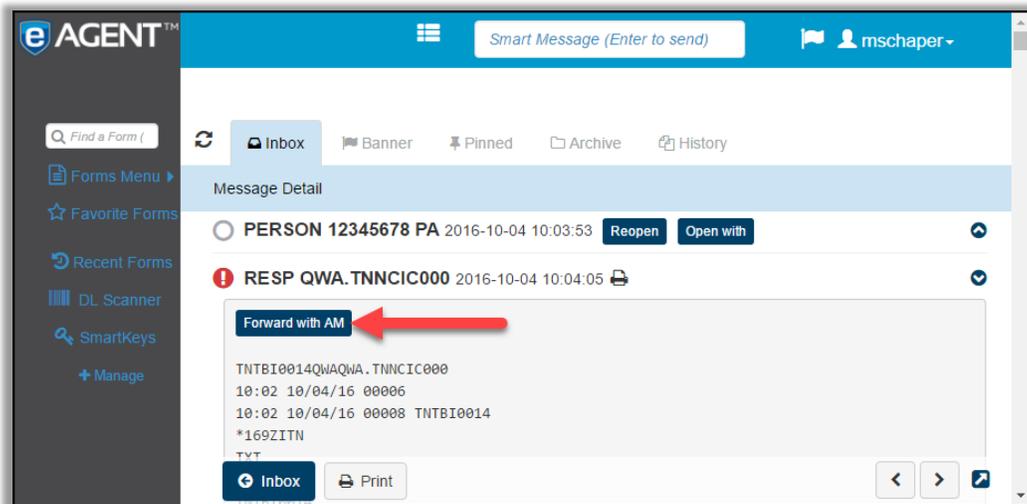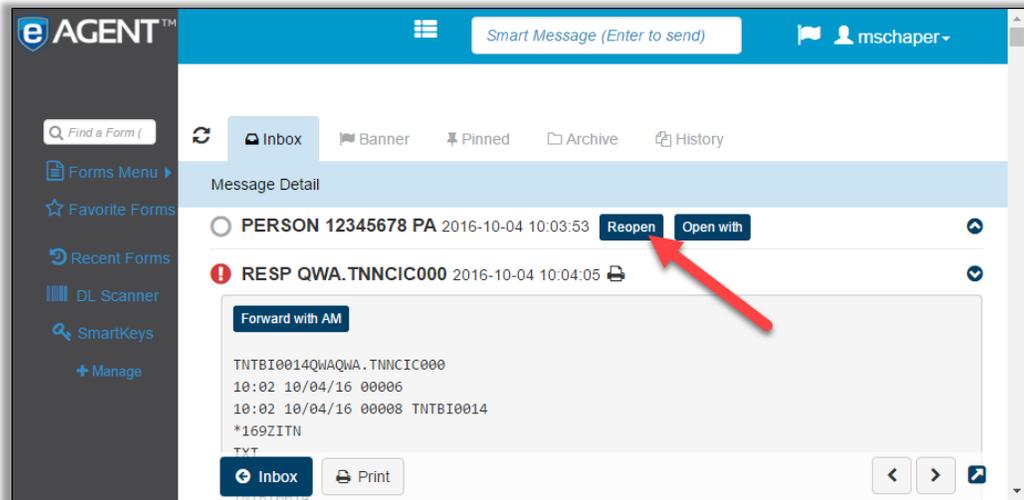

Message detail highlighting "Forward with AM" response button

3.10.4 Reopen Forms

You have the option to reopen message forms for transactions you have previously run, allowing you to resubmit the same transaction or edit a transaction before you submit it. To do this:

1. From the Inbox, click on a message to open the message detail page (refer to section 3.9 for more information).
2. Select **Reopen**.
3. The form will reopen with all of the information you originally entered populated in the fields. Make any necessary edits and click **Submit** to send the transaction.
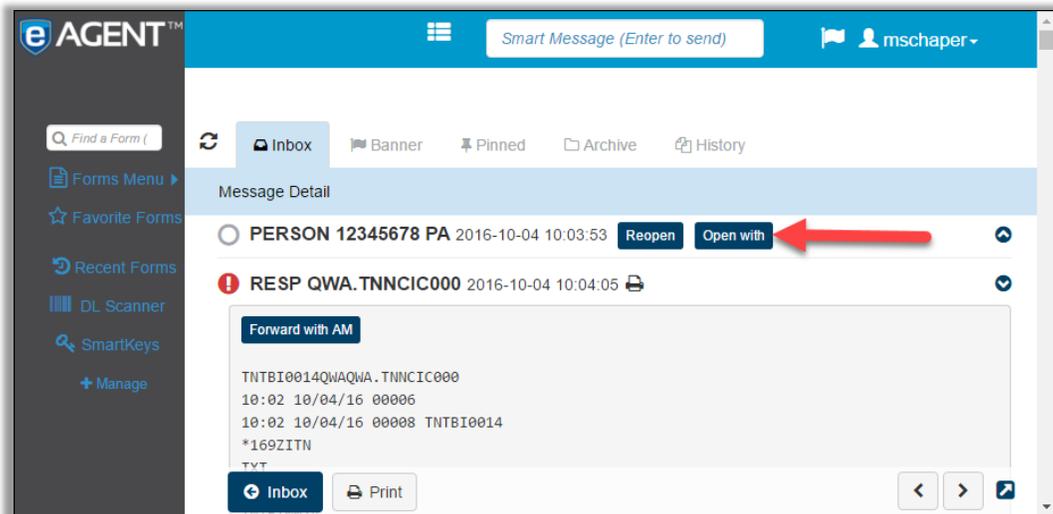
*Message detail highlighting "Reopen" button*

3.10.5   Open With

This feature allows you to reopen a transaction with a specific MKE. To do this:

1. Open a message detail (refer to section 3.9).
2. Select the **Open With** button at the top of the transaction.

Message detail highlighting "Open with" button

3. A notification will appear asking you to select an MKE to open the transaction with. You can select an MKE by typing its name in the filter box and selecting it from the table below, or by scrolling through the list of MKEs located below the filter box.
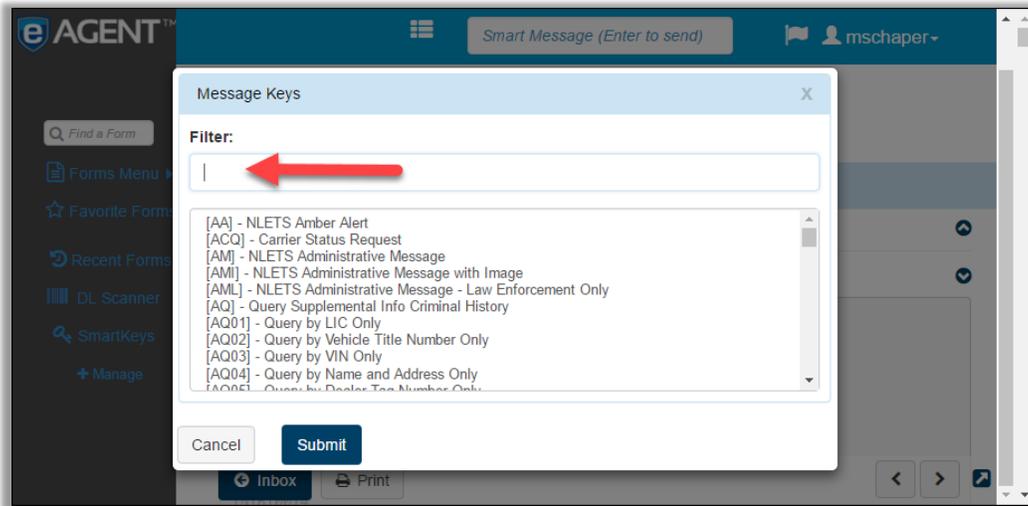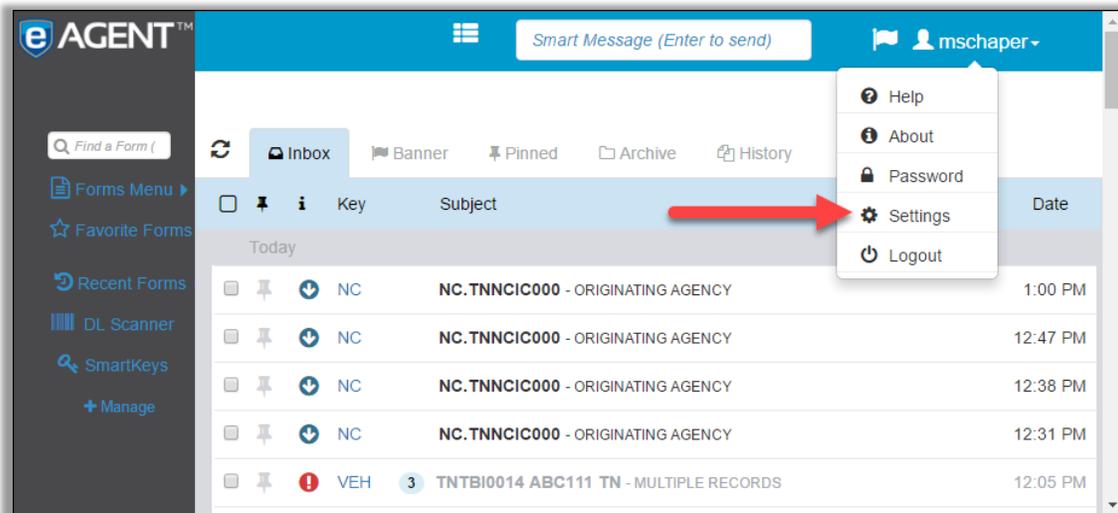
"Open with" message keys notification

4. Once you select an MKE click **Submit**. The form will open with the information from the response already filled in.
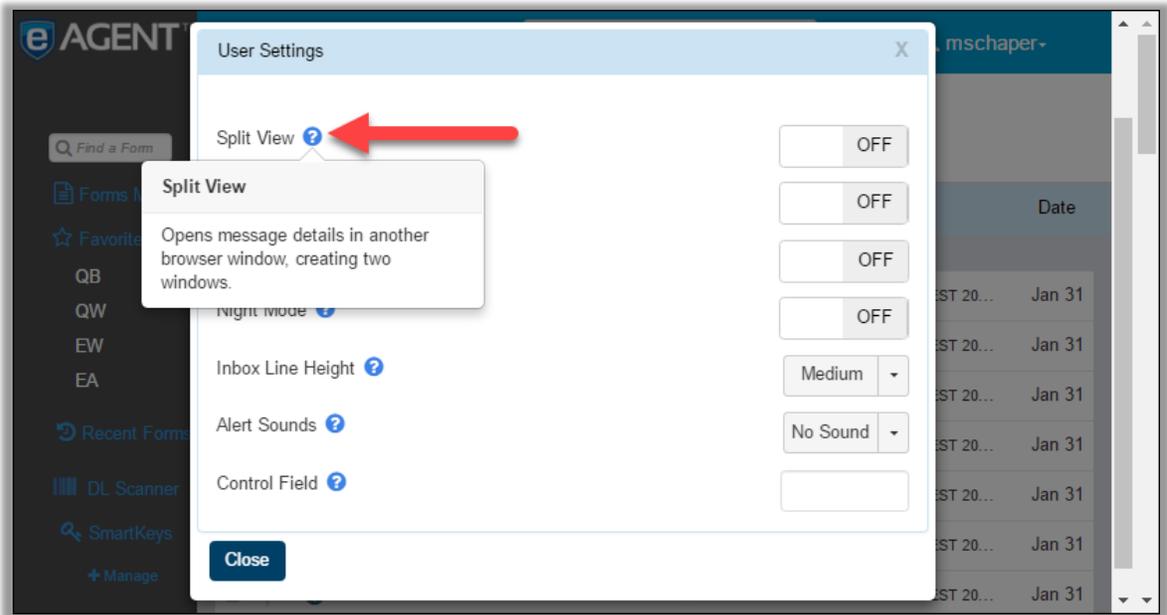
3.11 User Settings

There are several user settings available for you to customize the look and feel of eAgent 2.0. To access user settings select your user dropdown (refer to section 3.7) and click **Settings**.

*User dropdown highlighting user settings selection*

A notification will appear with all available user settings. Once you modify your user settings they will save automatically. You can change these settings by clicking on the toggle buttons on the right side of the User Settings dialog box. To view more information, hover over the question mark (?) icon to the right of each setting.

User settings notification highlighting question mark icon

3.11.1 Split View

The **Split View** setting automatically opens message details in a new window, allowing you to view message details and the Inbox at the same time. Each new message detail will open in the existing window rather than opening a new window each time. To activate Split View, open User Settings and toggle on the Split View option so that the "**On**" button displays.
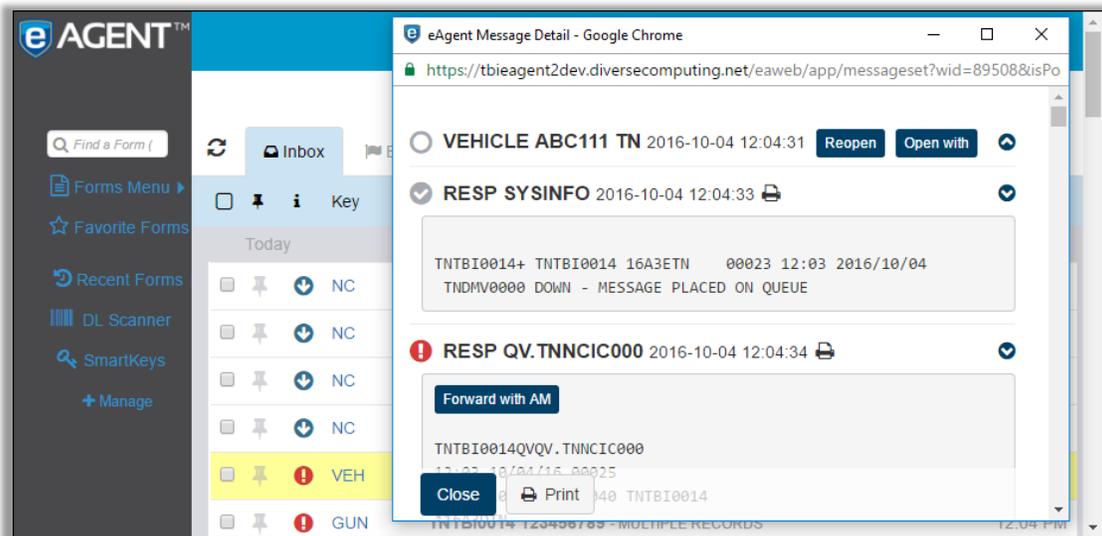
Message detail with Split View activated

3.11.2　　　Pop Out Forms

Pop Out Forms opens forms in a new browser window, allowing you to view forms and message details at the same time. If you open multiple forms at one time, multiple browser windows will open. To activate Pop Out Forms, open User Settings and toggle on the Pop Out Forms option so that the "**On**" button displays.
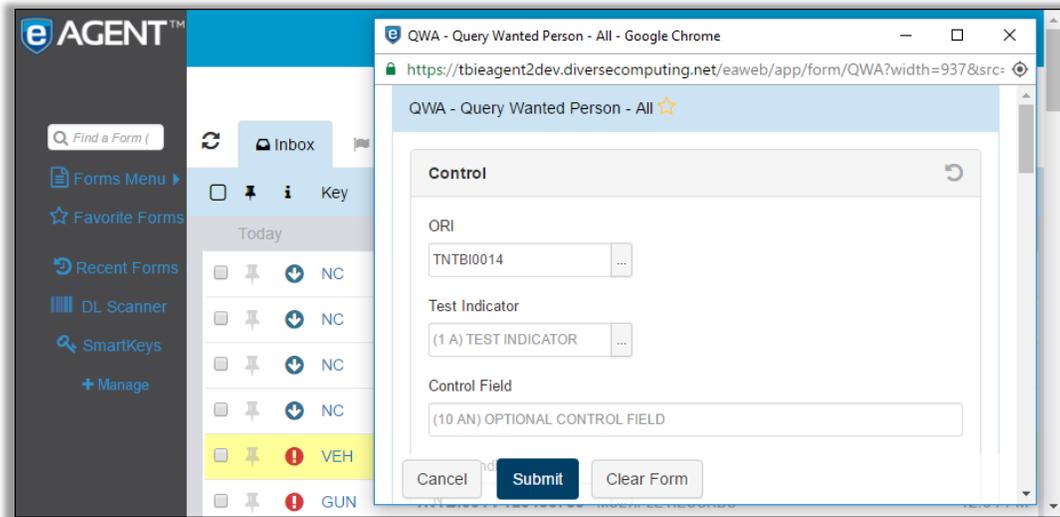
Pop Out Forms setting activated

3.11.3　　　Close on Submit

The **Close on Submit** feature refers to submitting Message Key Forms (Refer to section 6 for more information on completing message key forms). When you activate this setting in Tabs view, forms will automatically close once you select **Submit** and you will be redirected to the Inbox. If you have the Pop Out Forms setting activated, the form window will close once you click Submit.

To activate Close on Submit, open User Settings and toggle on the Close on Submit option so that the "**On"** button displays.

3.11.4   Night Mode

Night Mode inverts the color scheme of the application for ease of viewing in low light environments. When you activate this setting it will affect all sections of eAgent 2.0.

To activate Night Mode, open User Settings and toggle on the Night Mode option so that the "**On**" button displays.
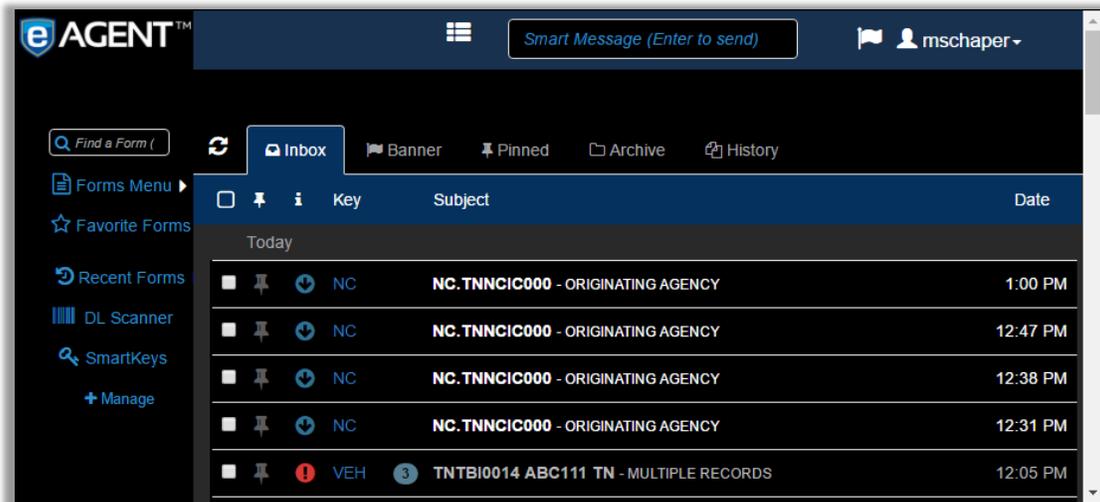

Night Mode setting activated

3.11.5   Inbox Line Height

You are given the option to change the line height of your Inbox according to your viewing preference. This change will affect the Inbox, Flagged, and Archive tabs. The three size options for viewing are **Small**, **Medium**, and **Large**.

To set Inbox Line Height, open User Settings and select a size from the drop-down menu.

3.11.6 Alert Sounds

Select a sound to get an alert each time you receive an unsolicited message. You have three sound options to choose from, however alert sounds are automatically set to "No Sound" in your user settings.
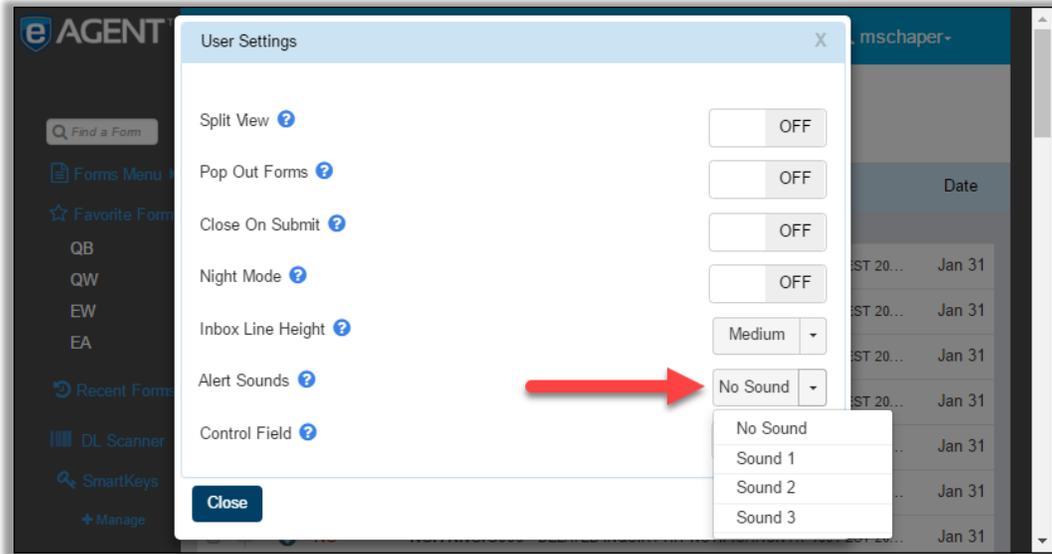
User Settings Highlighting Alert Sounds Options

3.11.7 Control Field

You can set a control number value for all forms through your User Settings. Enter the value you wish to use in the text box across from the Control Field setting in the User Settings notification. Once you change the value it will automatically save in your settings.
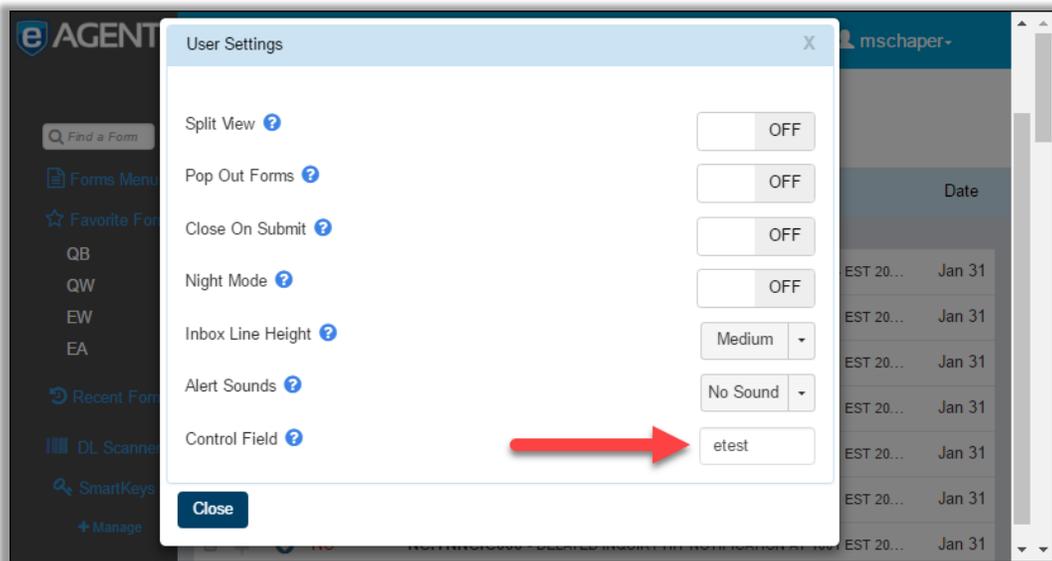

User settings highlighting control number field

4 Smart Message

The Smart Message feature allows you to quickly send three types of transactions: queries on persons, vehicles, and guns. Smart message evaluates your inputs and provides a formatting guide to help you as you enter your queries. The smart message hints will appear below the text field once you begin typing and will become more specific as you narrow your message.

Note that some smart message queries require a forward slash (/) after your text to successfully complete the query.

Smart message will also accept a colon (:) after your text to quickly filter the smart message hints.
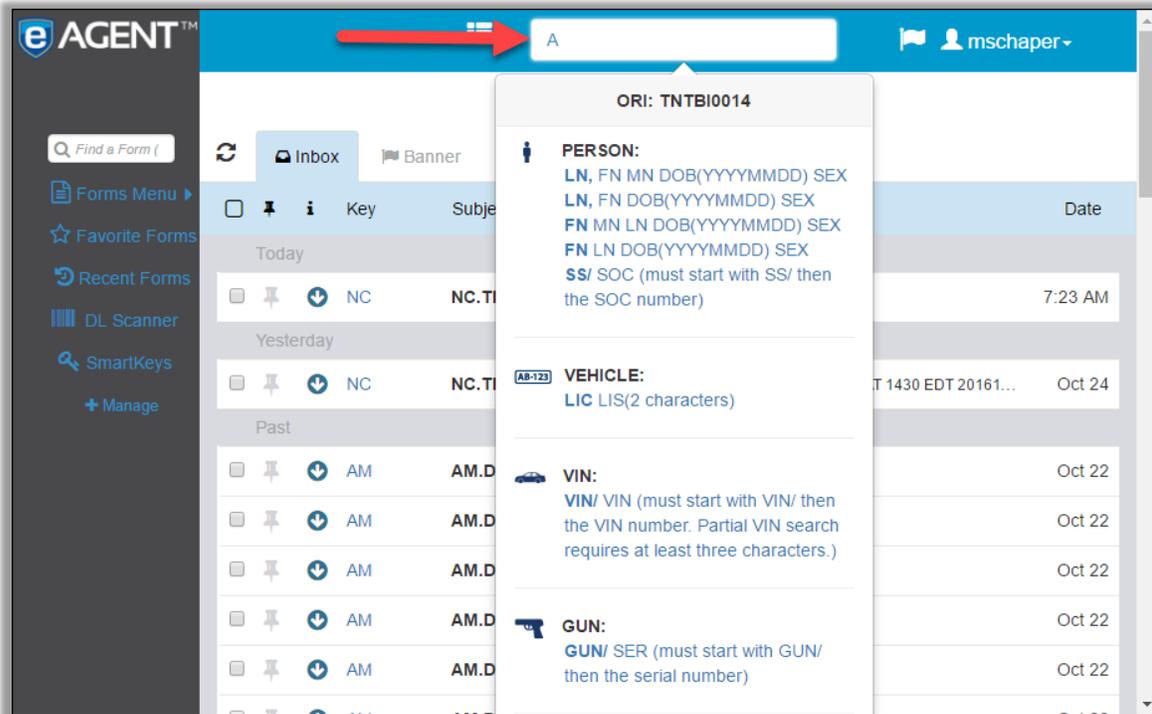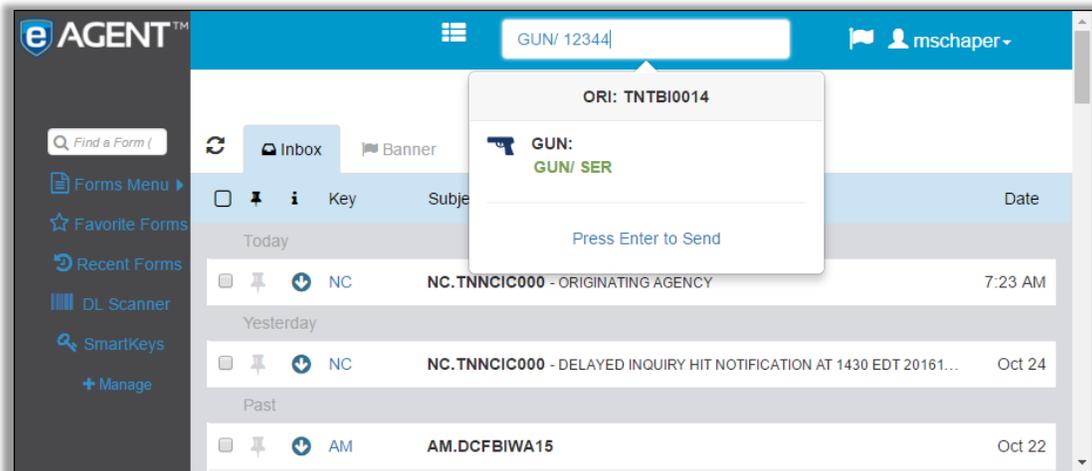

Smart message hints

4.1   Gun

To query a gun in smart message:

1.   When you type the word "GUN," smart message will show you hints for all three types of queries. To quickly filter the query, type a forward slash (/) after your text.
2.   Once you enter "GUN/" into the field using the forward slash, the hints will narrow down and display only the Gun format.
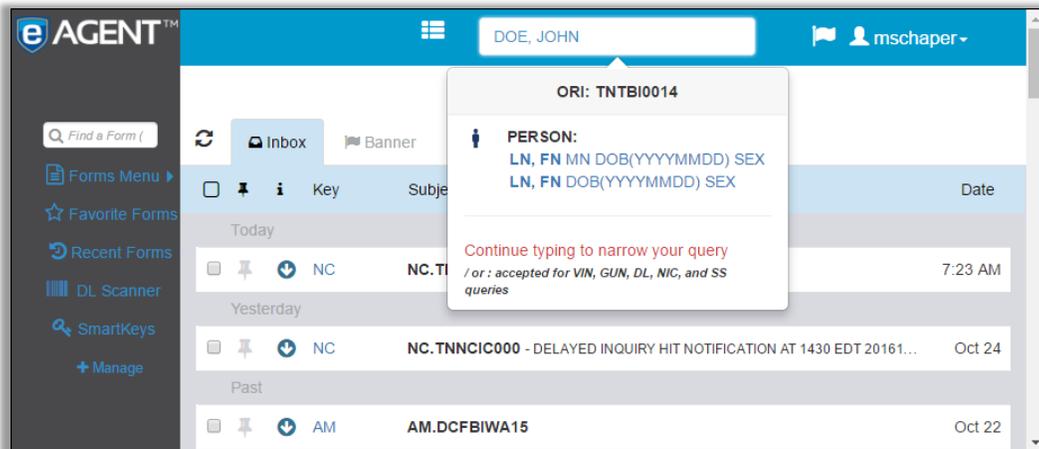3.   Press the Enter key to send your query.

Smart message gun hints

## 4.2   Person

To query a person by name in smart message:

1. Type the name of the person into the Smart Message field.
   a. You can begin with either the first or last name.
   b. If you type the last name first, be sure to place a comma between it and the first name.
2. After the name, insert a single space and enter the date of birth **(YYYYMMDD)**. Insert another space and enter the sex **(M/F/U)**.
3. Press the Enter key to send your query.

Smart message person hints

To query a person by social security number in smart message:

1. Type "SS/" into the field using a forward slash and the hints will narrow down to **Person SS** hints.
2. Enter a single space followed by the social security number.
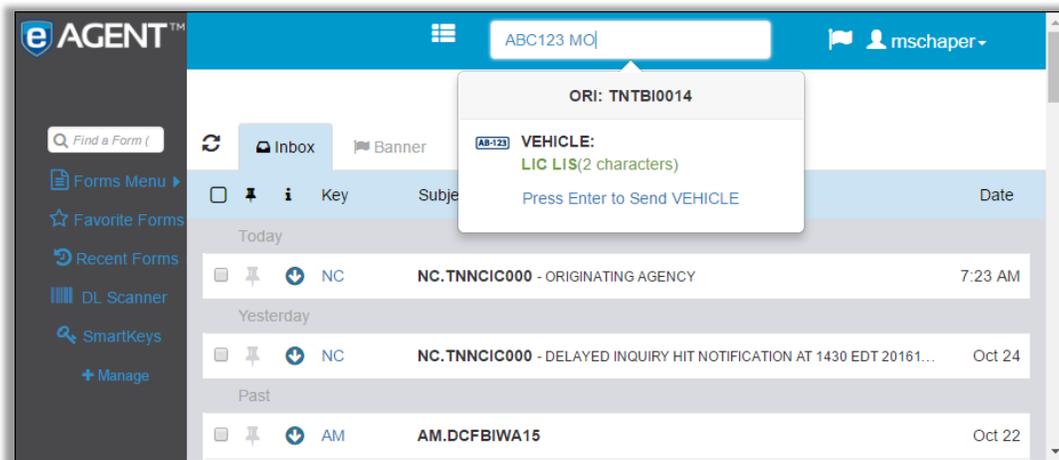3. Press the Enter key to send your query.
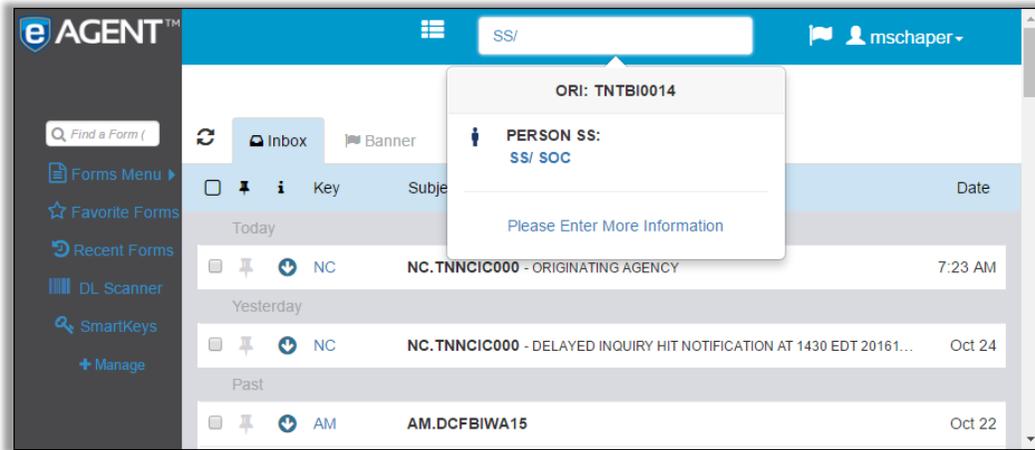
*Smart Message Social Security Number Hints*

4.3   Vehicle

To query a vehicle in smart message:

1. Enter a license plate number and state abbreviation. You must enter the state as an abbreviation to submit the smart message.


Smart message vehicle hints

- OR -

2. Enter a VIN. You must type "VIN/" into the smart message field using a forward slash to search for a VIN in smart message. A partial VIN search requires at least 3 characters (for VMA VYR) or at least 5 characters (for VMA VMO VST VYR). If you enter a full VIN it will perform a state search.
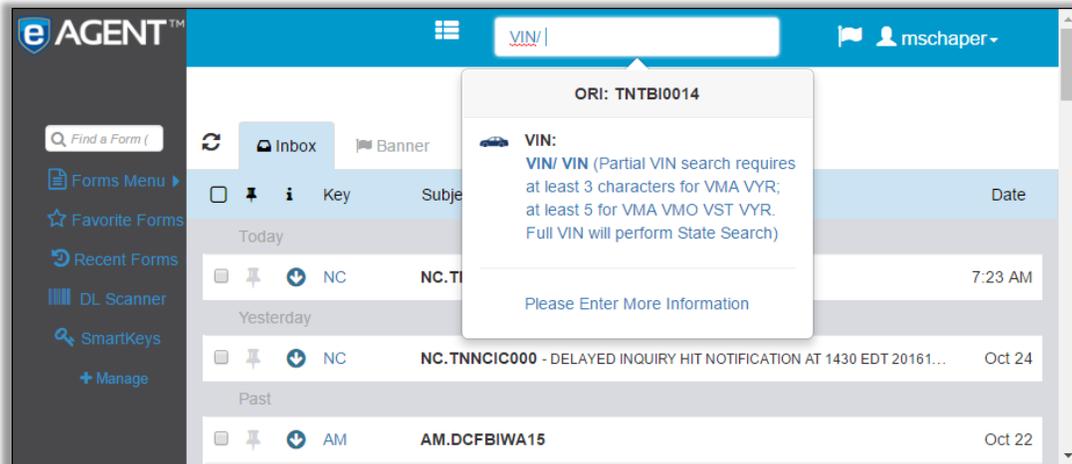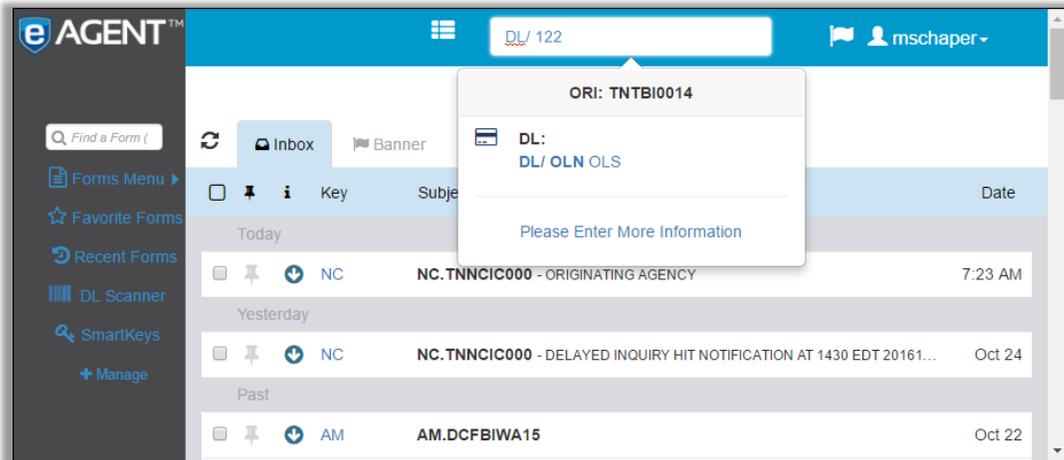
Smart message VIN hints

4.4　NIC

To query a NIC in smart message type **"NIC/"** followed by the NIC number you wish to query. The NIC smart message hints will be able to identify what type of NIC you are running based on the NIC number. Press the Enter key to send your query.
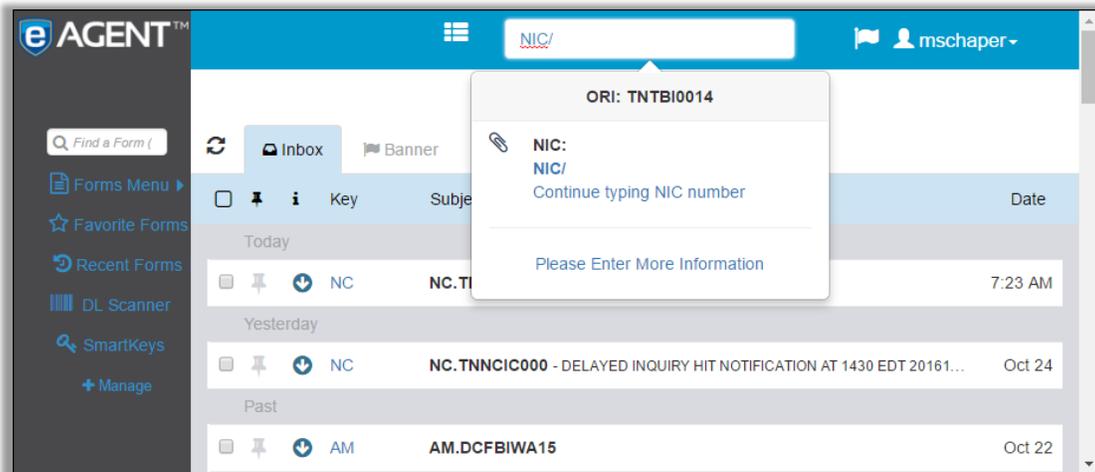
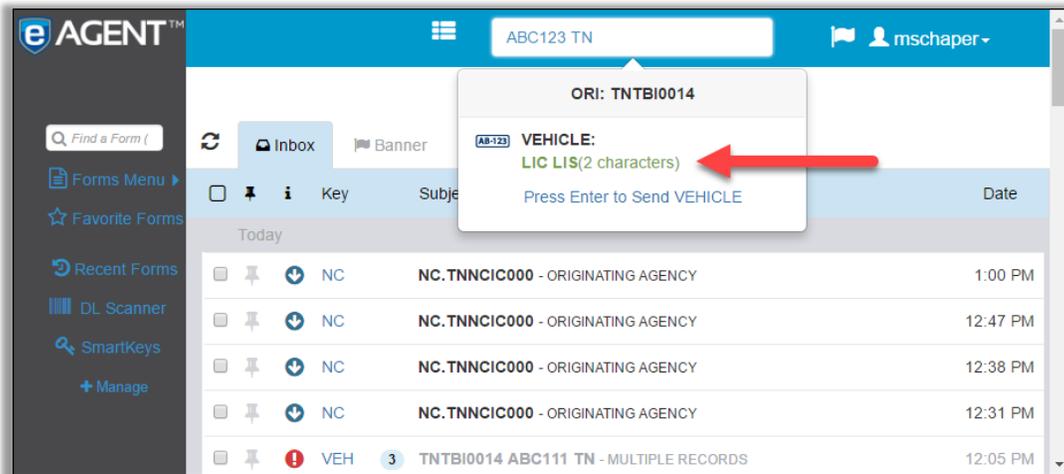*Smart message NIC hints*

4.5　Driver's License

To query a driver's license in smart message, type **"DL/"** followed by the license number and state abbreviation. To successfully submit the smart message, the license number cannot be longer than 20 characters. Press the Enter key to send your query.

Smart message Driver's License hints

4.6   Hints

The smart message hints feature will indicate when your message matches an accepted format by turning green.
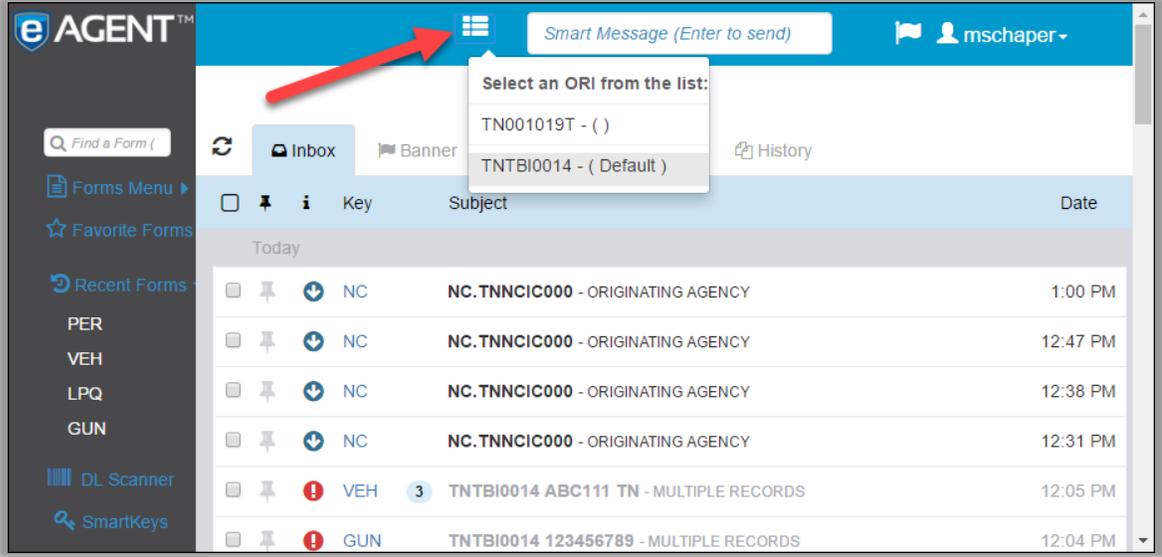

Smart message highlighting green hints

If your message does not match an accepted format the hints will indicate NO MATCH. Smart message will not allow you to send a message in an invalid format. If you attempt to enter a message in an invalid format, the message will not send, and focus will stay in the smart message box so you can retype the query.
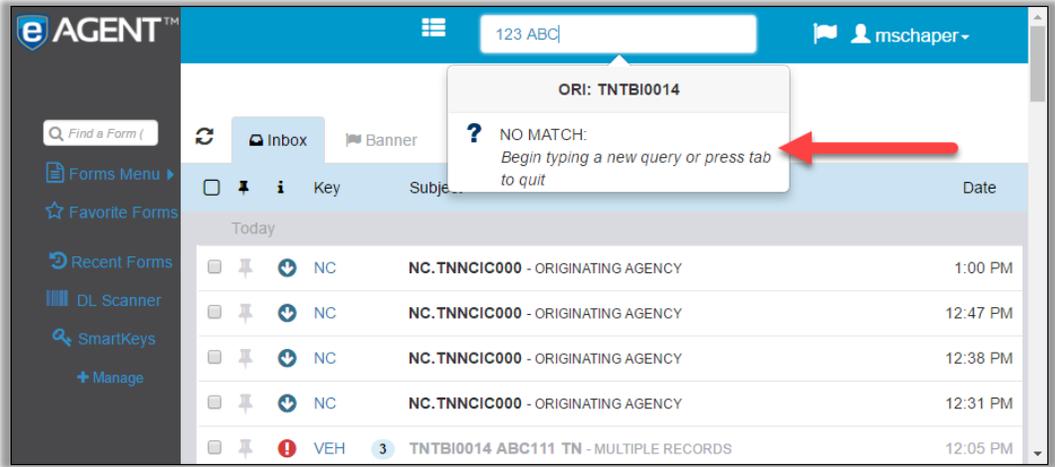
*Smart message displaying "No Match" result*

4.7   Select ORI

Users with multiple ORIs can select which ORI they would like to send messages from in Smart Message. To do this, click on the ORI dropdown icon to the left of the smart message field. The dropdown will display all ORIs that are assigned to you. You can also use the key combination **Alt+Shift+O** to open your ORI dropdown.

ORI dropdown icon

Once you begin typing in the smart message field, the ORI you selected will display at the top of the smart message hints.
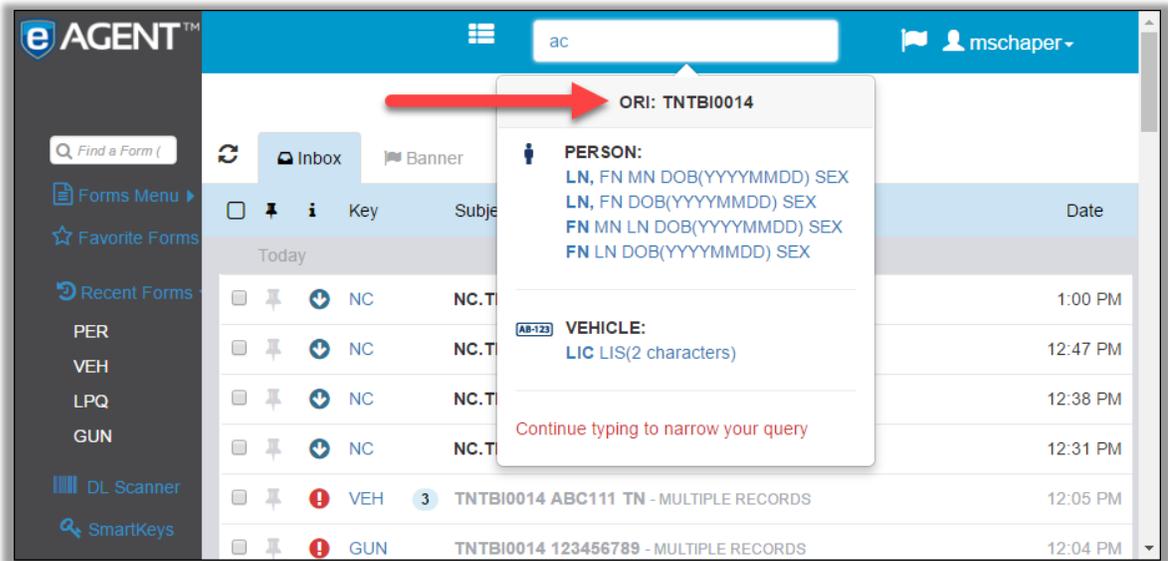
Smart message hints highlighting selected ORI

5 Side Navigation

You can access the primary navigation links in eAgent 2.0 from the navigation panel on the left side of the page.

5.1 Find a Form

To search for a specific form, select the **Find a Form** text box from the top of the side navigation panel. You can also use the **Alt+Shift+K** key combo to bring focus to this text box. Begin typing the name or message key of the form you wish to use, and select it from the dropdown menu that appears. The form will open in either a new tab or in a new window, depending on the user settings you have enabled.
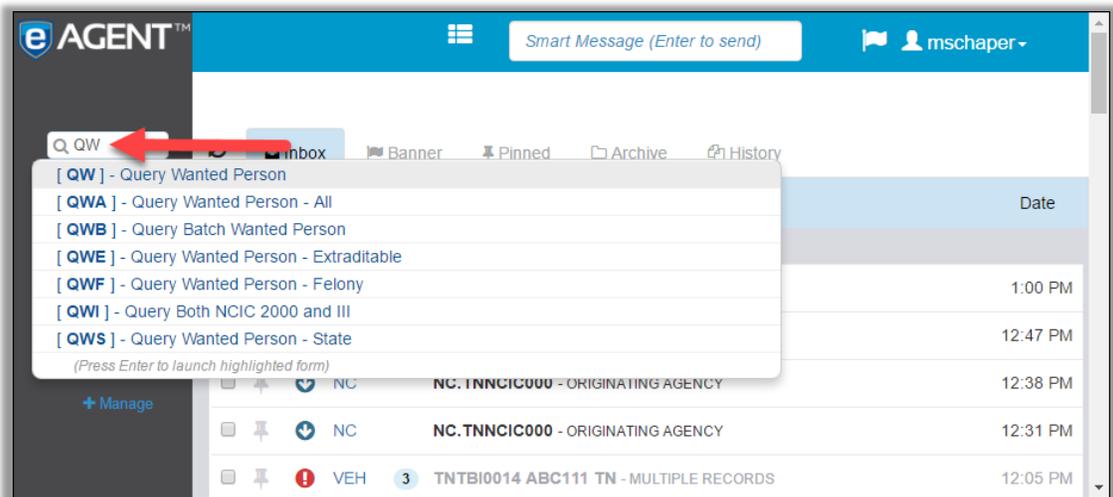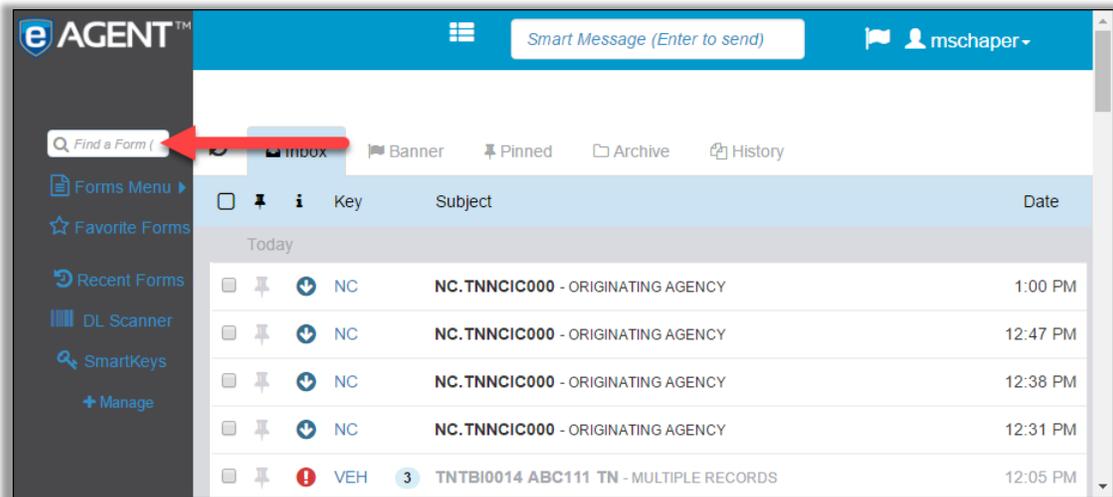

Navigation panel "Find a Form" text box

5.2   Forms Menu

To navigate through all forms in the application, select the **Forms Menu** link from the side navigation panel.

The Forms Menu organizes forms by category and displays them in a tree format. To close the menu, click anywhere on the page outside of the menu. Selecting the Forms Menu again will open the menu tree where you last left off.
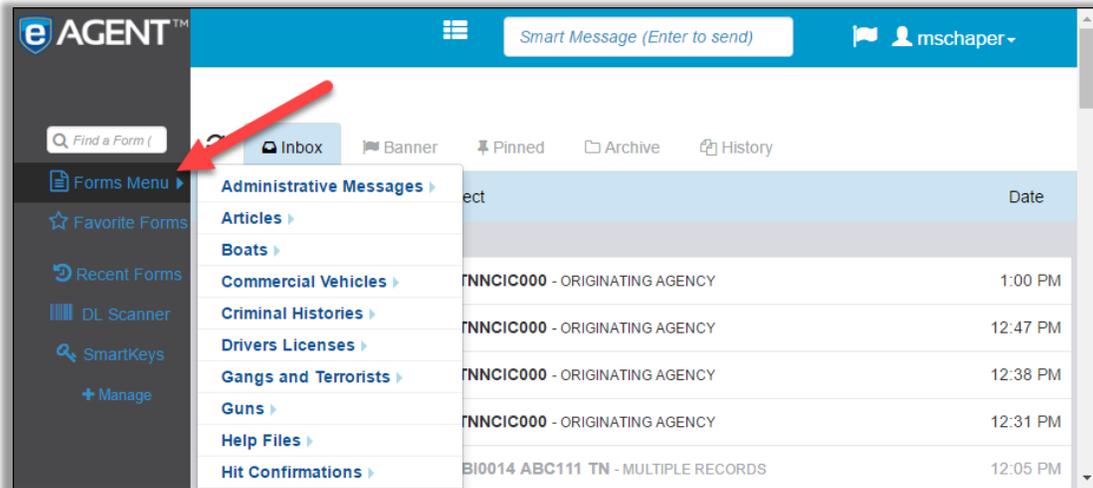
Forms menu

5.3   Favorite Forms

In eAgent 2.0 you can set favorite forms and assign specific key combinations to them. These forms and their key combos display in a list beneath the **Favorite Forms** link in the side navigation. Select Favorite Forms from the side navigation panel and a dropdown list of your favorite forms will appear.
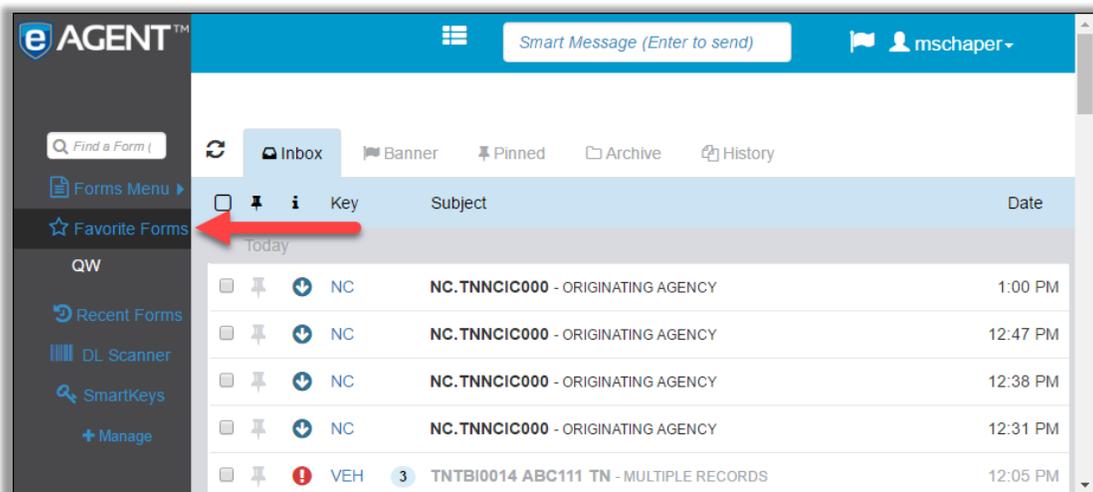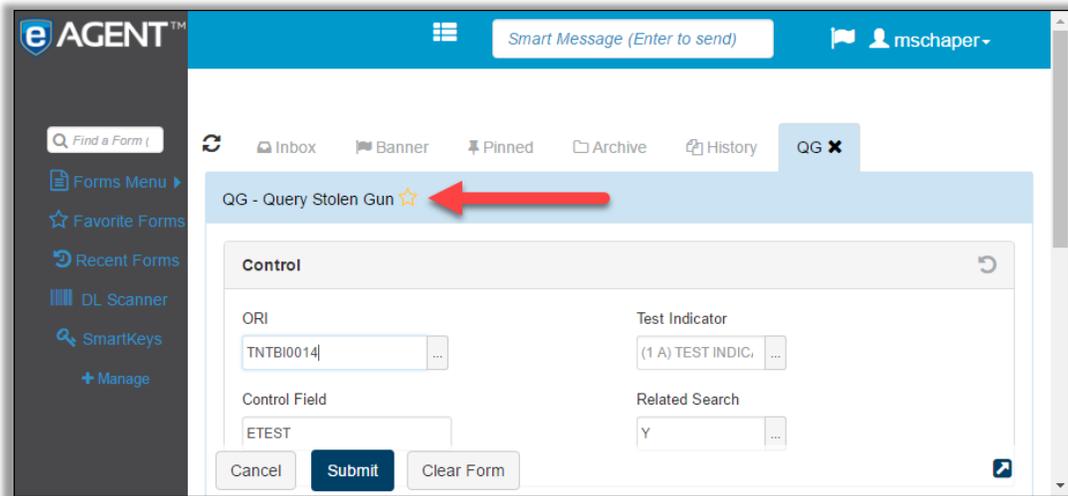

Favorite forms

5.3.1 Setting a Favorite Form

Follow these steps to set a favorite form:

1. Open any form in the application.
2. Select the star shaped icon in the header of the form. The star icon will be filled in yellow for any forms that are already set as a favorite.

*Favorite form star icon*

3. In the notification that pops up, you have the option to choose a key combo from the dropdown menu or select "None". If you select "None" there will not be a shortcut for the form, but it will appear in your favorite forms dropdown menu.
4. Click **Set Favorite**. This form will now be listed under Favorite Forms in the side navigation panel.
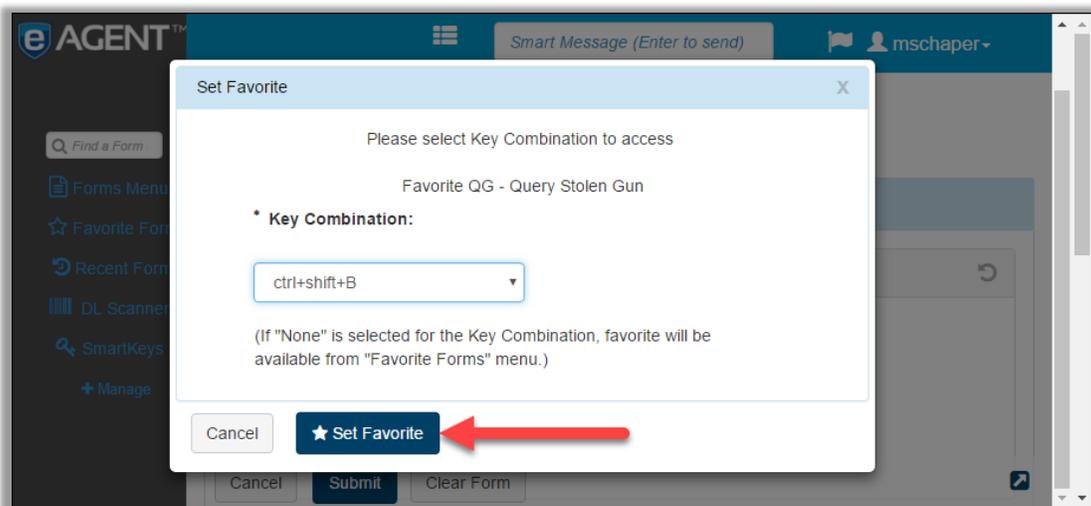
Set favorite notification

5.4 Recent Forms

Recent Forms displays the top five forms you most frequently use. You can toggle this list by clicking the **Recent Forms** link in the side navigation panel.
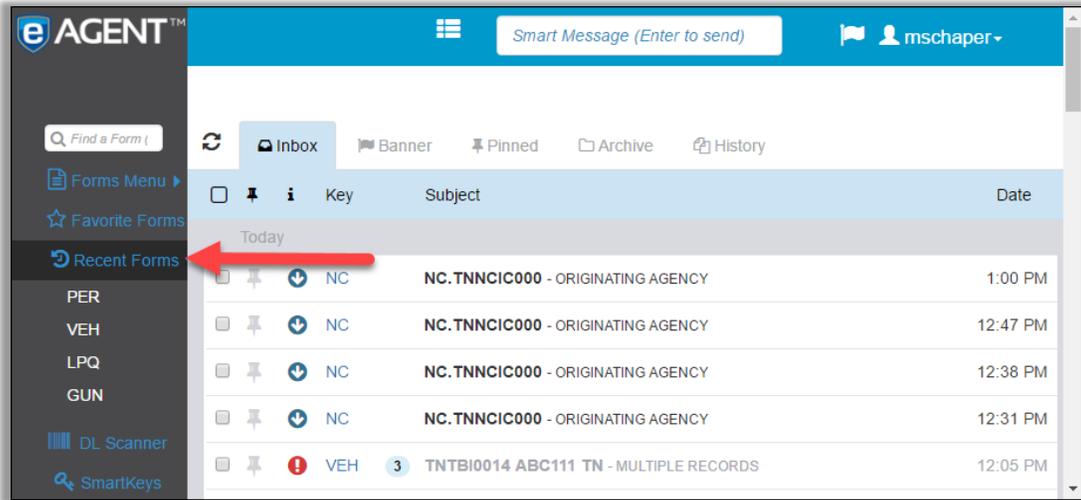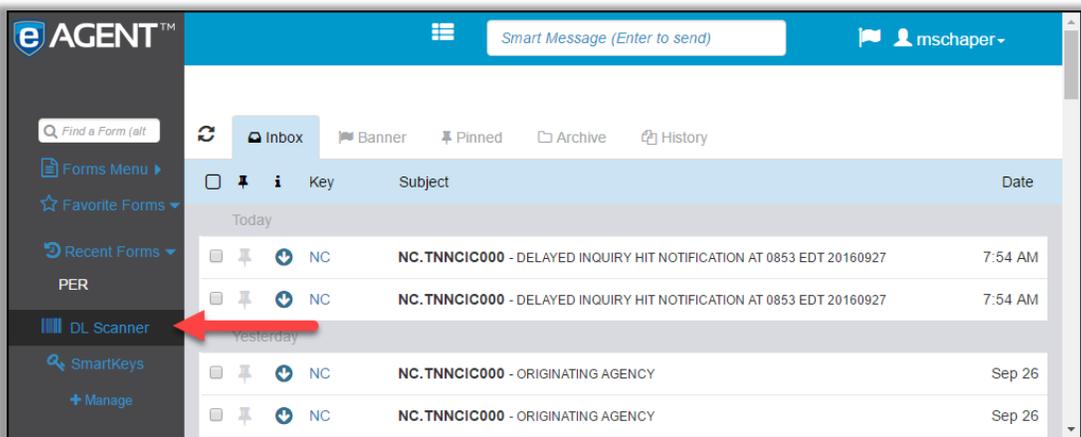

Navigation panel highlighting recent forms link
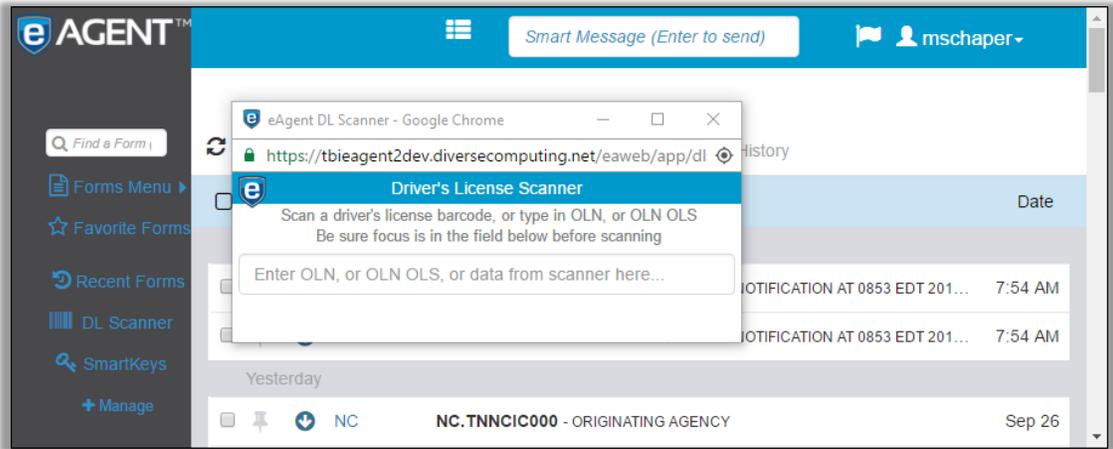
5.5 DL Scanner

The Driver's License Scanner allows you query a person by scanning a driver's license barcode, typing in an Operator License Number, or typing in both an Operator License Number and Operator License State.

Select the **DL Scanner** link from the side navigation panel to open the eAgent DL Scanner window.

DL Scanner

If you choose to scan a driver's license barcode, the transaction will submit automatically, and a response will appear in the Inbox. If you enter an OLN, or OLN OLS, you must press the **Enter** key to submit the transaction.

DL Scanner Window

5.6 Save Drafts

eAgent 2.0 allows you to save an un-submitted message as a Draft to be sent out at a later time. Access your Drafts from your side navigation Save Drafts section by selecting the desired MKE.
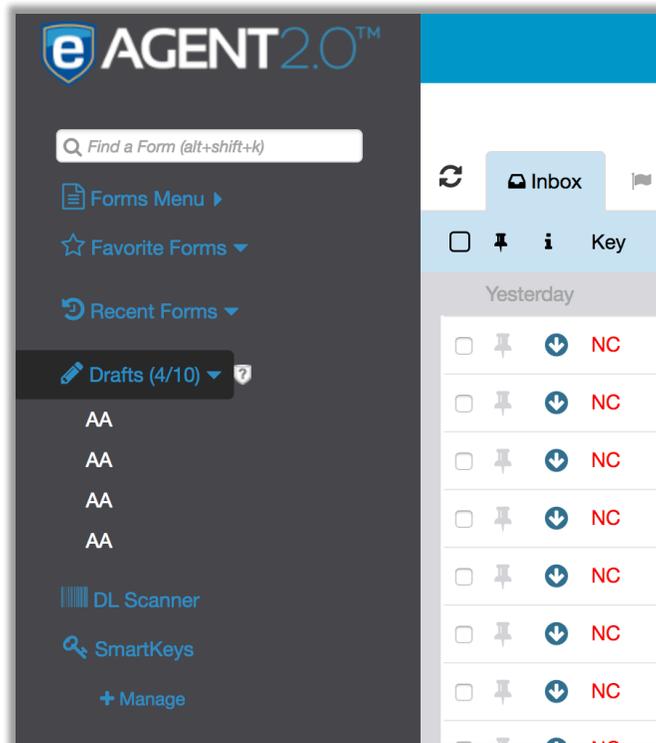
Save Drafts Pictured in Side Navigation Window

The MKE for each Draft is displayed in this list; hover over it to view the timestamp for when the message was last saved. Users can have a maximum of ten drafts at any one time.
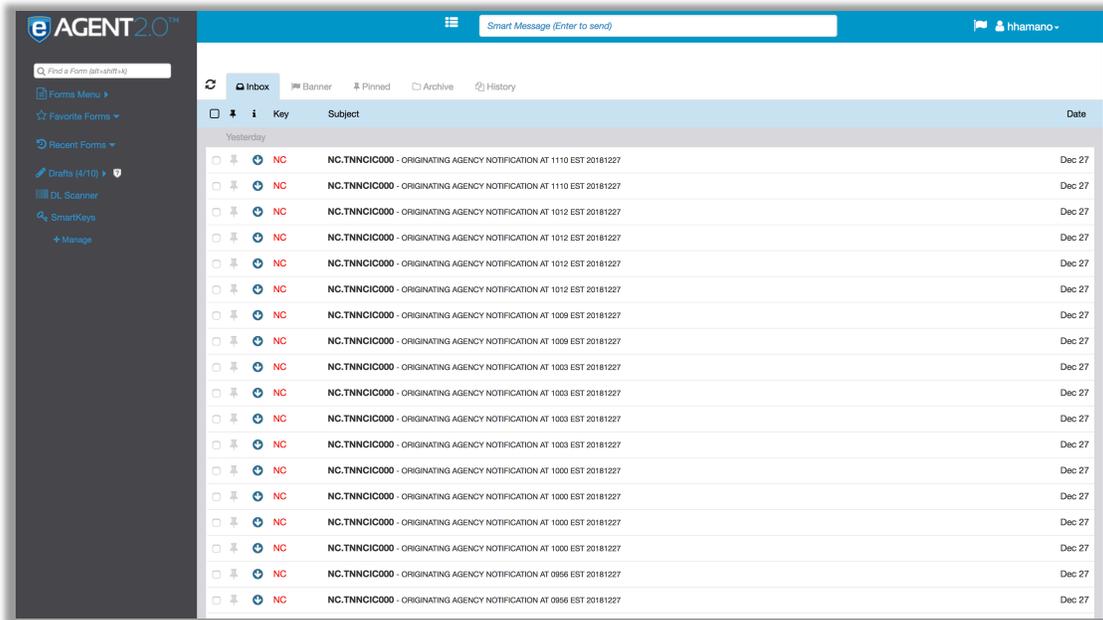

Drafts Inbox

Note: Drafts will be saved for the same retention period as messages in the Inbox. This is set at the implementation level.

Selecting a Draft from the side navigation will open the form. You can only have one copy of a draft open at a time. Submitting your draft will remove it from your Save Drafts list.

Saving a Draft
Any un-submitted message can be saved as a Draft. Navigate to the bottom of a form and select the Save Draft button. This will save the form as-is, including all user entered values. If you make any additional changes be sure to select Save Draft again before logging out of the system.
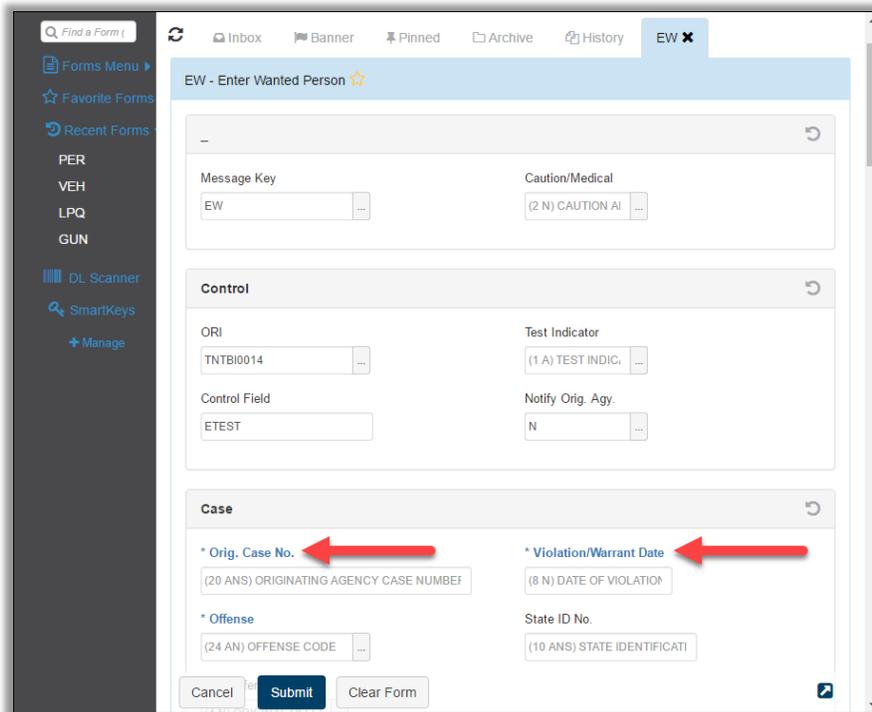
6 Completing and Sending Message Key Forms

6.1   Completing Forms

Once you select a form, it will open in a new tab or window ready for you to fill out. To assist you with submitting accurate transactions, eAgent 2.0 validates your entries in real time using mandatory field indicators and field edit checks. An example of this is shown in the next section for the EW (Enter Wanted Person) form.

6.1.1 Mandatory Field Indicators

Mandatory field indicators are labeled with bold blue typeface and have an asterisk (*) preceding them. Once you enter a valid entry in the field, the asterisk will disappear, and the font will change to plain black text. If you enter all mandatory information for a form, then any remaining mandatory field indicators will change to plain black text. To submit a form, you must enter appropriate values in all mandatory fields.


EW form highlighting mandatory field indicators

Field Edit Checks help you enter correct information in data fields that require specific information. For example, a Social Security Number field requires nine numeric digits to satisfy

that edit check. When you enter incorrect data into one of these fields, it will be highlighted red until the specific criteria for the field is met.
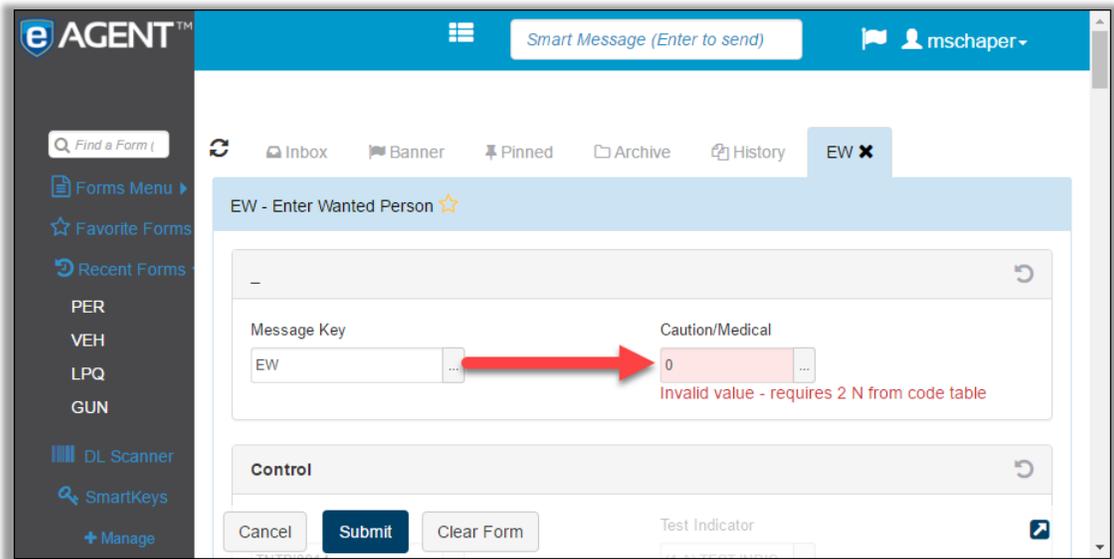
EW form highlighting field edit checks

6.2   Code Tables

Code tables allow you to efficiently search through and filter criteria for certain fields within forms. To access the code table for a field when completing a form, select the ellipses (**…**) button to the right of the corresponding field. Any field with an ellipses button has a code table. The example shown below highlights the ellipses button for the "Offense" field in the Enter Wanted Person form.
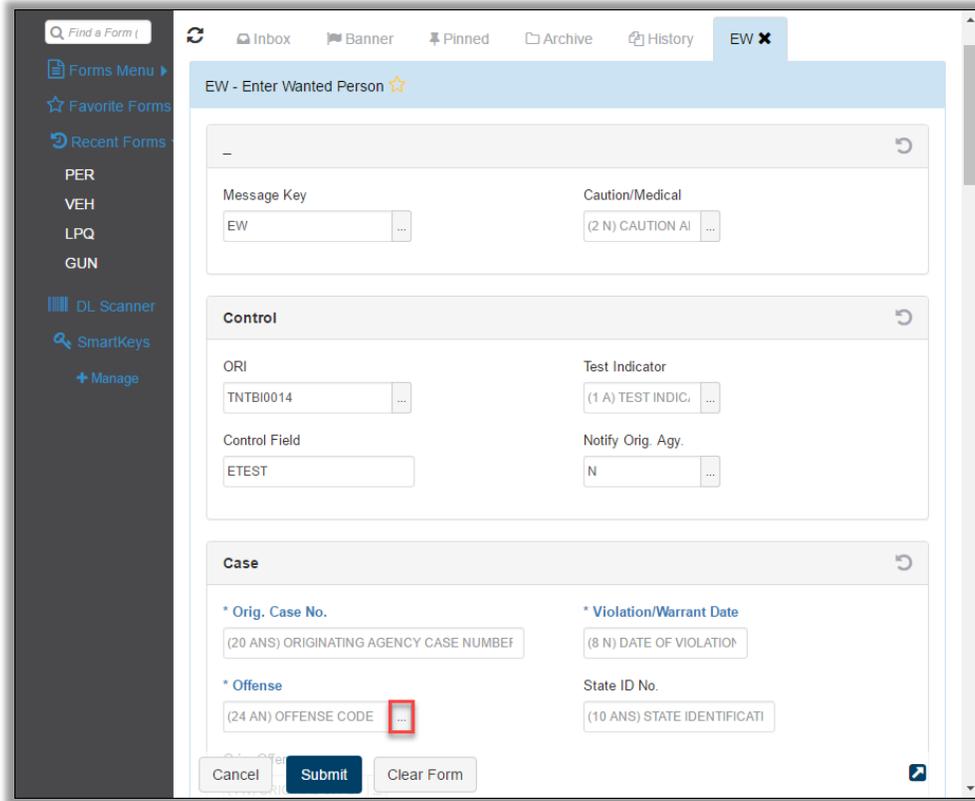
EW form, "Offense" field code table ellipses button

When the code table notification opens, type in the **Filter** field to filter through the code table selections or scroll through the list below to find the correct code. Select a field from the table and click **Submit**.
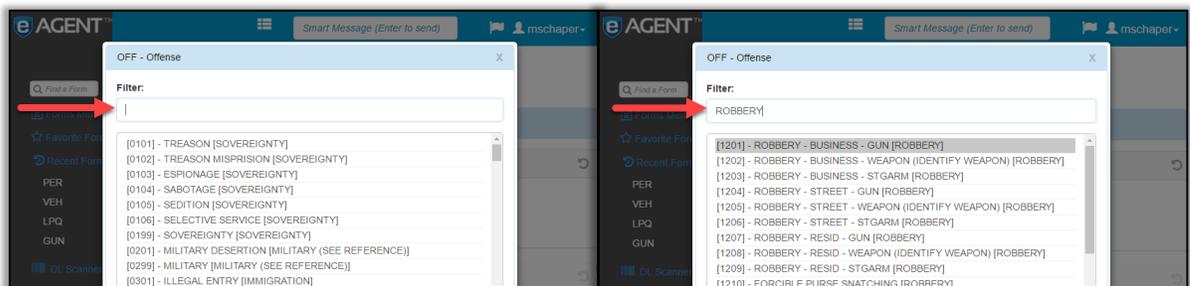
EW form, "Offense" code table filter

6.2.1 Edit Code Tables

You can edit certain code tables by adding and removing custom fields. To do this, select the ellipses button (**…**) for the code table you wish to edit. The example below explains how to add a field to the ORI code table within the Enter Wanted Person form:

1. Click on the ORI ellipses button and a notification will pop up.
2. Select **Insert** to insert a new code into the table.
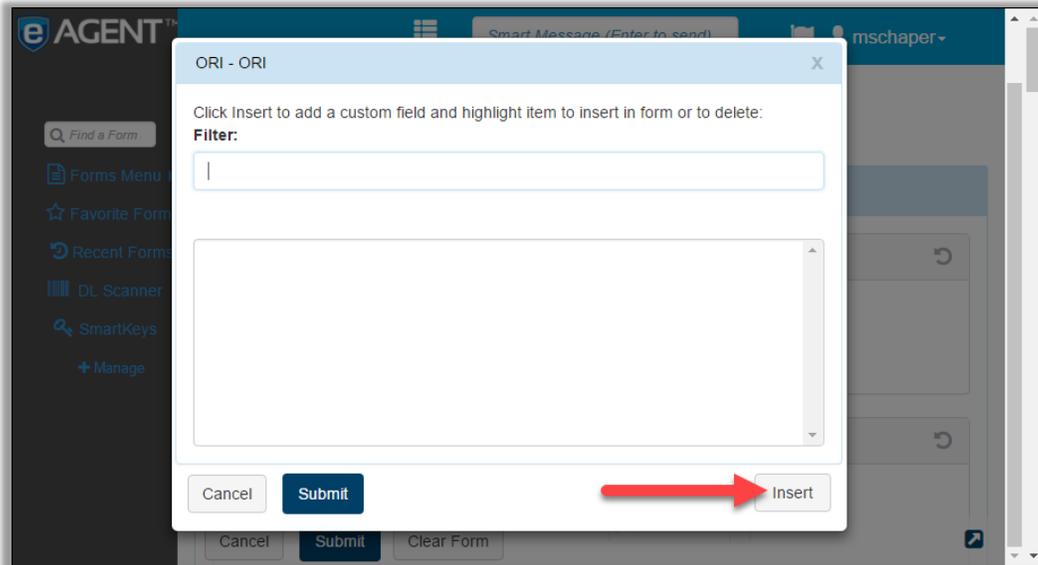
EW Form, ORI edit code table notification highlighting "Insert" button

3. The fields will change, allowing you to enter in a value and a description for the ORI. Complete these fields and select **Add**.
4. Reload the form and the new value will be available in the code table.
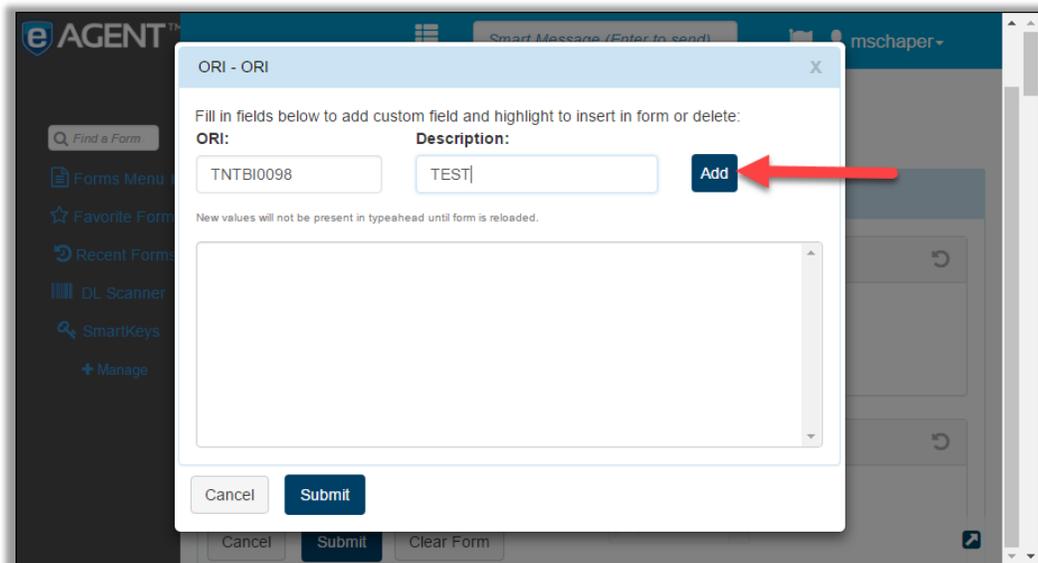
EW form, ORI edit code table notification highlighting "Add" button

To delete a value from a code table, select it in the table and click **Delete**. This can be done from either the main code table page or the Insert page.
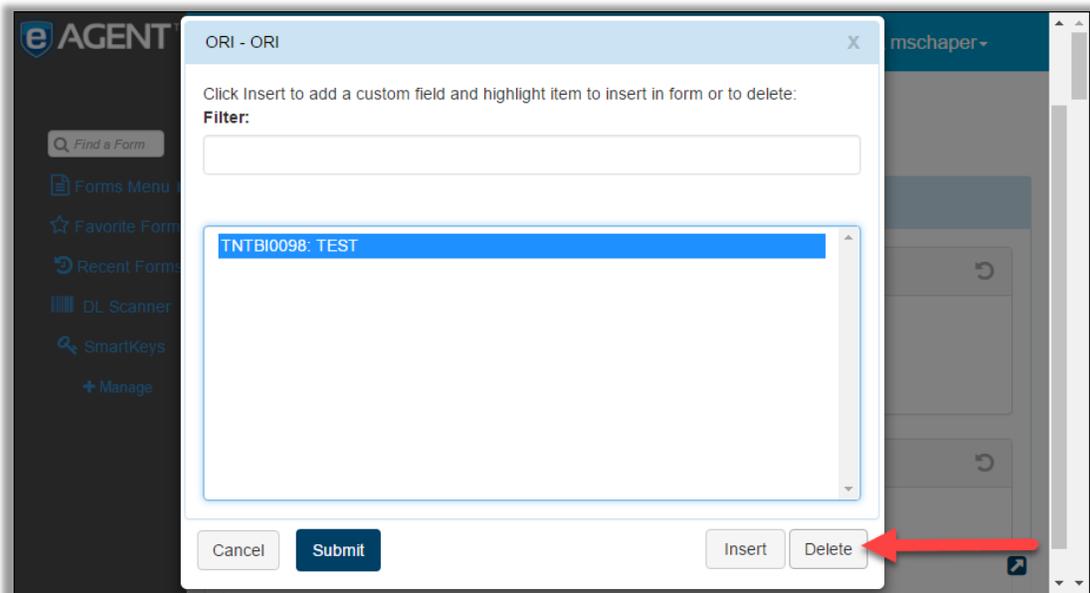
EW form, ORI edit code table notification highlighting "Delete" button

6.3   Submitting Message Forms

To successfully submit a message form, make sure that all mandatory fields are complete. If there are no incomplete mandatory fields indicated with blue lettering and an asterisk, then click the **Submit** button at the bottom of the form to send the message. The Submit, Cancel, and Clear Form buttons float at the bottom of the page for easy access.

EW form highlighting "Submit" button

6.4   Clearing Message Forms

There are two methods of clearing message forms:

1. Select the **Clear Form** button at the bottom of the page. This will clear all sections of the form with the exception of default values.
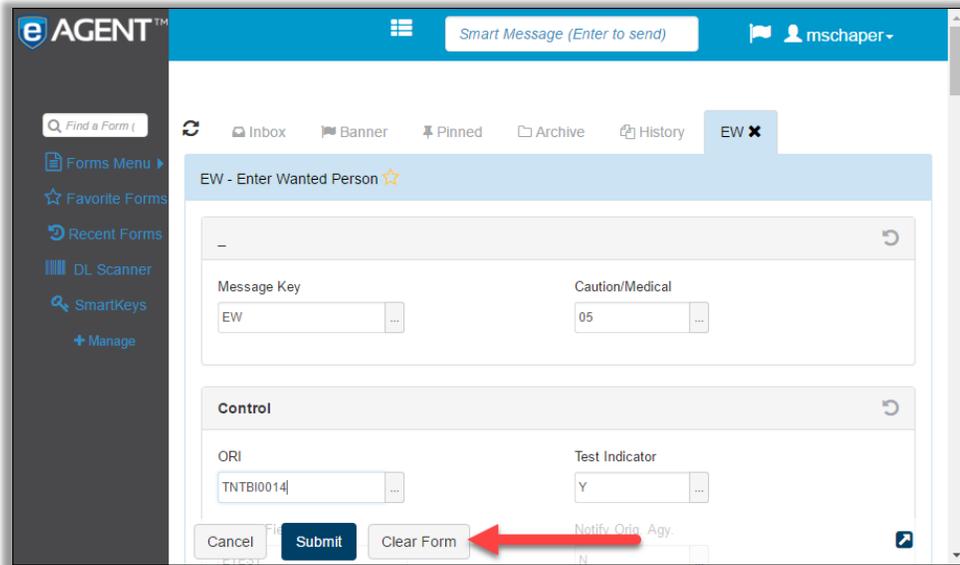
EW form highlighting "Clear Form" button

2. Use the **Clear Section** icon to clear each section of a form individually. This icon is located on the right side of each section header. Selecting it will clear out any information you previously entered in that section, except for default values.
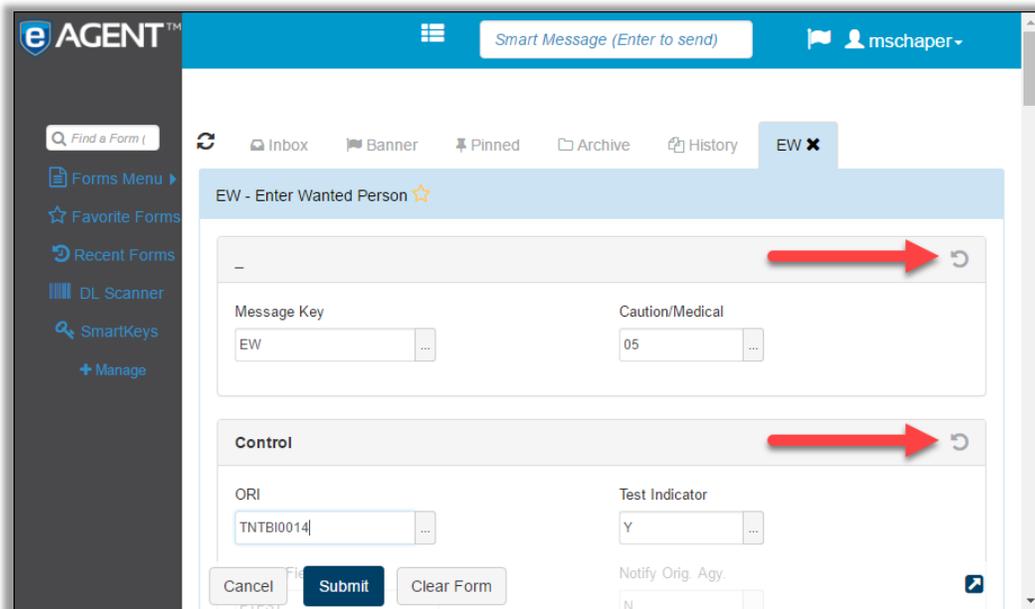
EW form highlighting "Clear Section" icon

6.5   Attaching an Image to a Record

To attach an image to a record, open any form that contains an image field and locate the **Image File** field on the form. You can choose from two options when attaching an image:

1. **Drag and drop** – click and drag the image from your desktop to the box labeled "Drag and Drop Here". Release the image over the box and it should take the place of the text.
2. **Choose Photo** – selecting this will open the finder on your device. Select an image file and click **Open**. Crop the image appropriately and save it as one of the three types of accepted image formats (jpg, png, and gif).

Select the **Remove Image** button underneath an image if you wish to remove it from the form.

EIM form highlighting Image File field

7 Create a Report

You have the ability to create and sort reports in eAgent 2.0 for easy review and printing. To create a report:

1. Select several messages from your Inbox.
2. Choose **Create Report** from the buttons that appear at the top of the page.
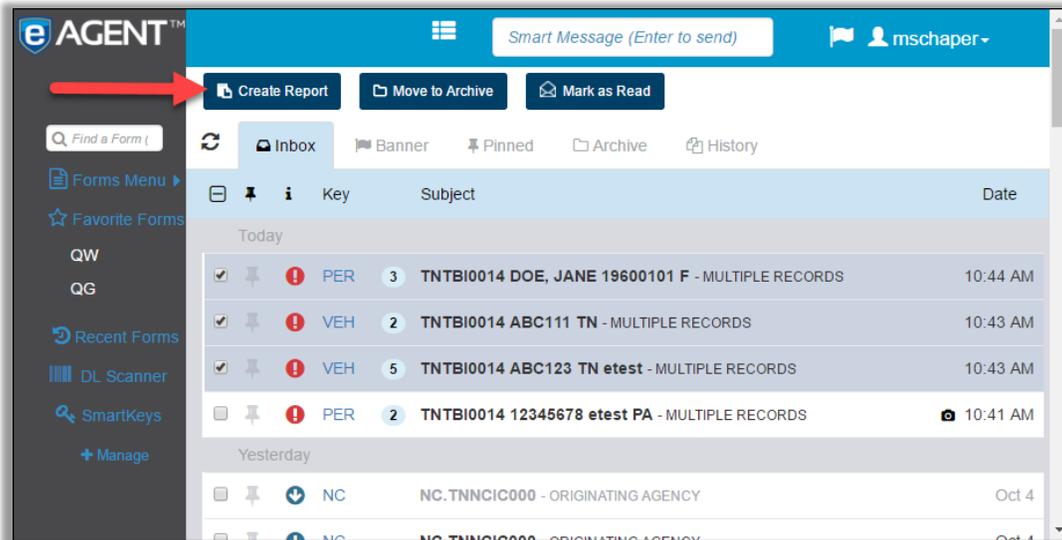
Inbox tab highlighting "Create Report" button

3. The report will generate in a new window and sort automatically by the newest message first. To change the sorting order of the report, click **Sort By** and select an option from the drop-down menu.
4. To print the report, select **Print** and follow the directions from your browser.
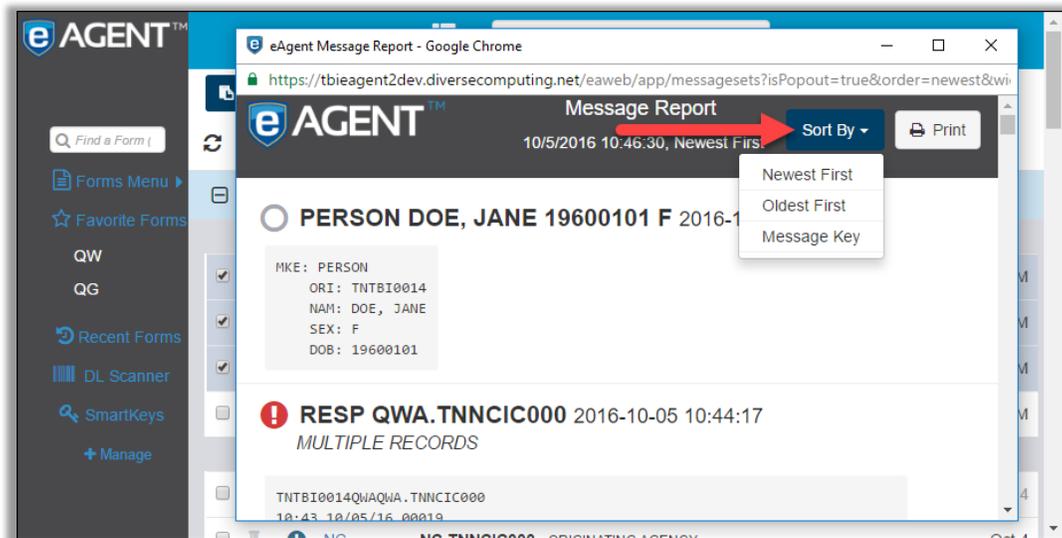
eAgent Message Report highlighting "Sort By" button

8 Additional Features

8.1   YQ Workflow

The Hit Confirmation workflow is designed to help you quickly receive and respond to YQs as they come in.

8.1.1 Incoming YQ

The eAgent 2.0 application alerts you of Hit Confirmation messages with both visual and audio notifications. The notification will display to all users in the group, and it requires a user to acknowledge the notification before taking any other actions in the application. Once a user in the group accepts responsibility of the hit confirmation, the alerts being sent to the group regarding the YQ will stop. A notification will display to the group with the name of the user who accepts responsibility.

Agencies have the option to change their permissions settings to allow users to dismiss YQ notifications. This permits users to dismiss YQ messages without having to claim responsibility for them.
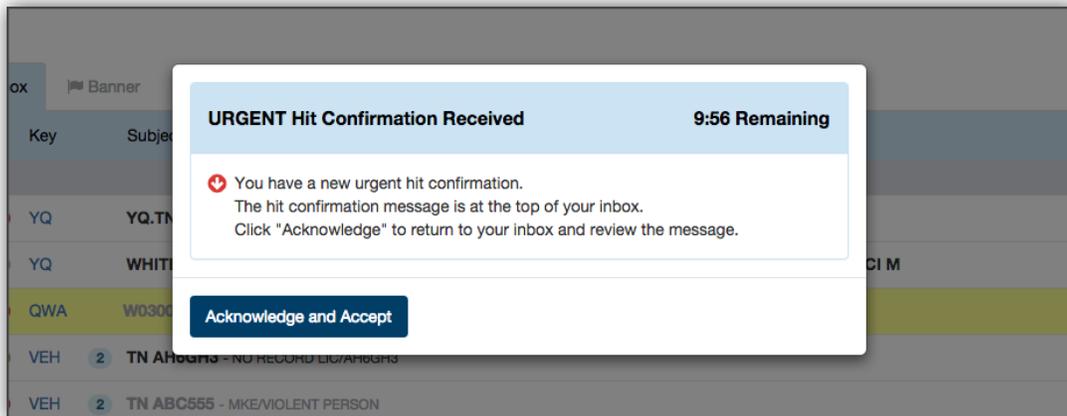
Incoming YQ notification

8.1.2 Accepting a Hit Confirmation

When you receive a hit confirmation, a countdown of the time you have left to accept the YQ will automatically display at the top of the notification. To accept responsibility for it click **Acknowledge and Accept**. The contents of the YQ will open in a new notification.
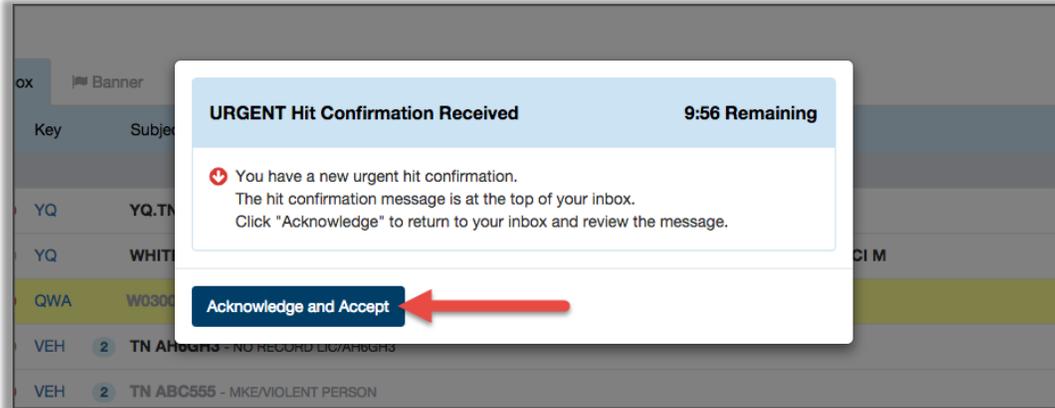
Accepting YQ notification

8.1.3   Responding with YR

To send a YR, select the **Respond with YR** button at the top of YQ message detail window. The YQ will appear at the top of your Inbox if you need to refer to it at any point.
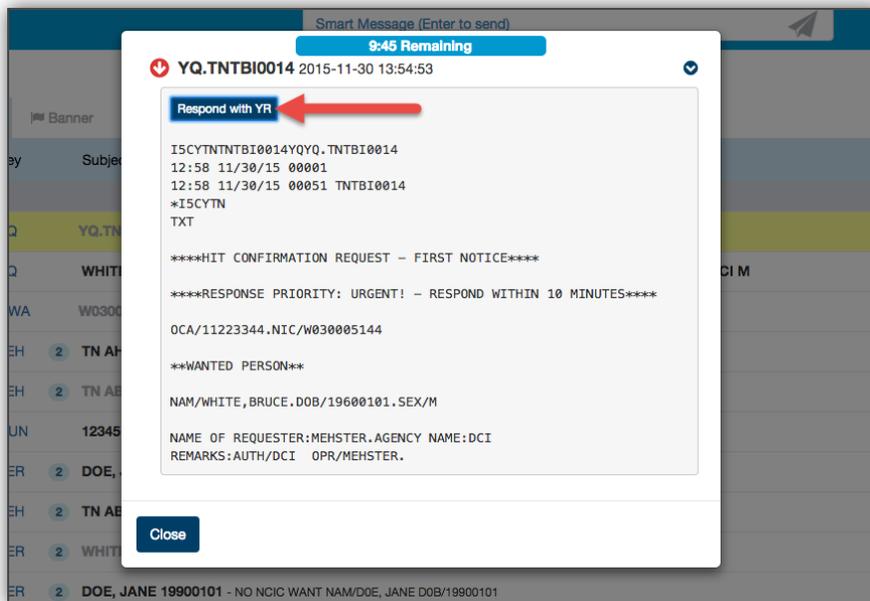
Accepted YQ notification highlighting "Respond with YR" button

For Urgent Hit Confirmations you will have ten minutes to respond, and for a Routine Hit Confirmation you will have an hour. A countdown will display at the top of the YQ notification with the amount of time you have left to respond.

8.1.4 Hit Confirmation Reminders

In the case where you accept a hit confirmation but choose to continue other work before responding with a YR, you will receive a notification reminding you to respond. This reminder will pop up when approximately three minutes remain for an urgent hit confirmation, and when seven minutes remain for a routine hit confirmation. The countdown of the remaining time will display at the top of the notification. To respond with a pending response select **Send Pending Response**.

Agencies can change their permissions settings to send a hit confirmation reminder to all users in the agency. This would include the username of the user who accepted responsibility for the YQ.
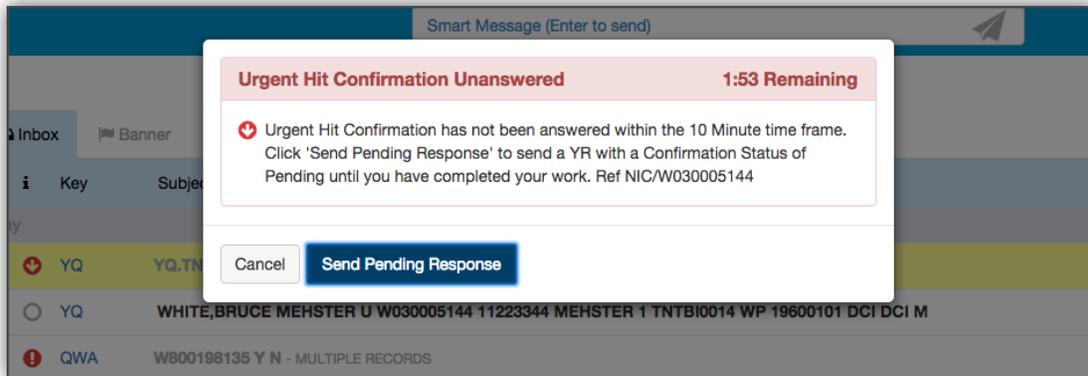
Hit confirmation reminder notification

When you choose to send a pending response, the notification will prompt you to enter the hours required to confirm Hit Confirmation. Enter the hours in the box next to "Hours Conf" and click **Send YR**. A confirmation notification will appear reminding you to complete a YR response, and a YR response will appear in the Inbox as well.
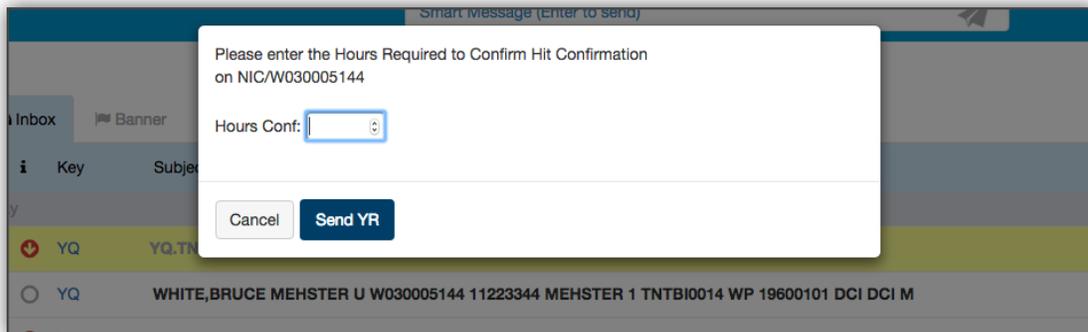
Pending YR notification

8.2   SmartKeys

SmartKeys can be set by your TAC or admin and allow you to quickly open and submit forms.

8.2.1 Using SmartKeys

Select the **SmartKeys** link from the side navigation to open the SmartKeys entry box window.
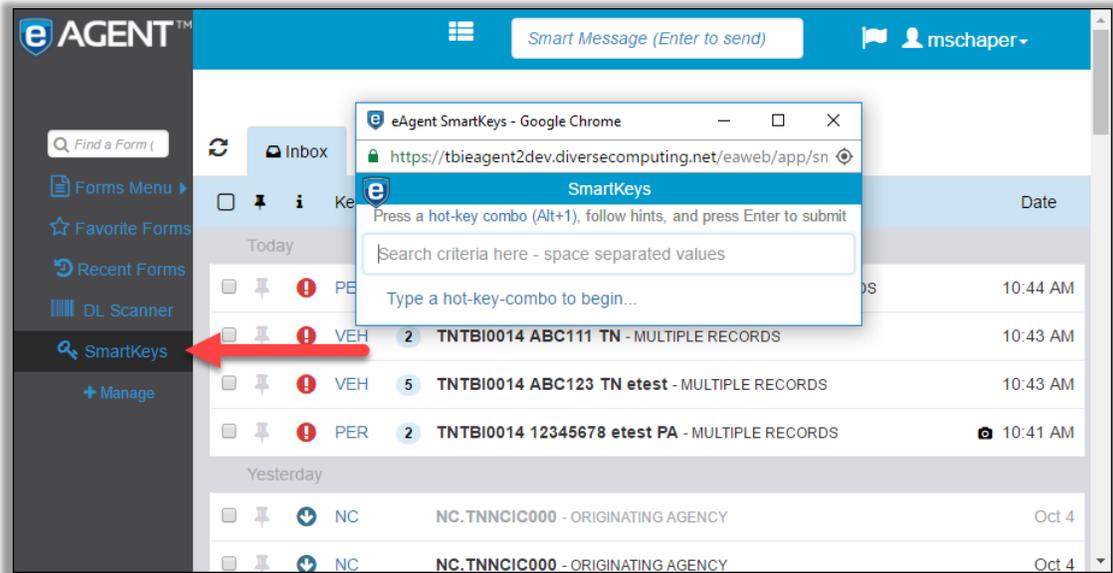
SmartKeys entry box

There are three main components to the SmartKeys entry box:

1. **SmartKey Help**: you can open this feature by clicking the **hot-key combo** link at the top of the entry box, or by selecting **Alt+1** while the entry box is in focus. The help feature displays all available smartkeys and their details: the key-combination, form name, action, and a description of the form and its values.
    a. The blue text shown in SmartKey help indicates values that the user is to enter.
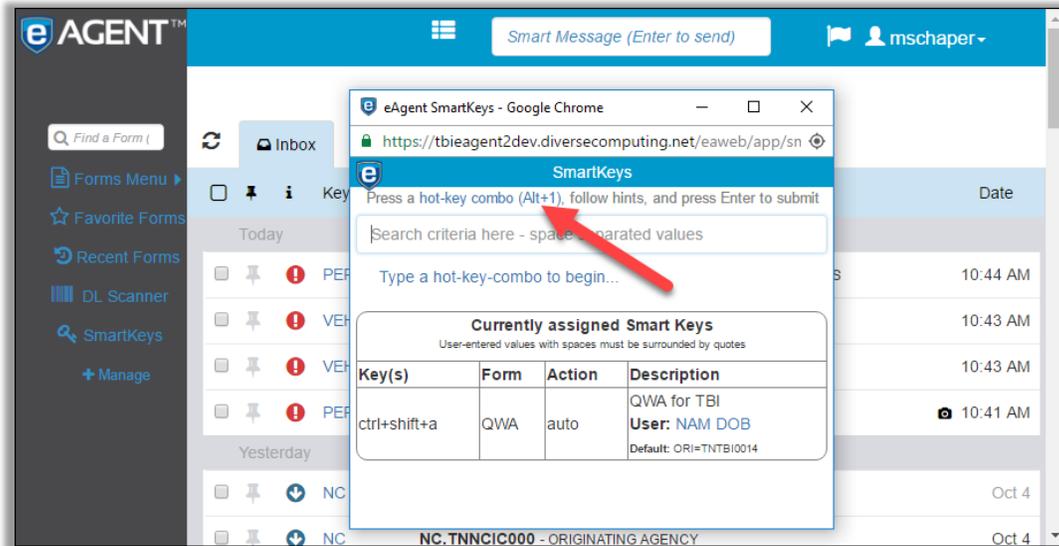
SmartKeys Help

2. **Entry field:** this section of the SmartKeys entry box allows you to activate forms. Enter the appropriate hot-key combination, then type in the appropriate values with a space separating each. Press Enter to send the message.

3. **SmartKey hints**: these display automatically beneath the entry field when you enter a hot-key combination. The first value that displays is the MKE of your SmartKey. All values after the colon (:) are the values you enter in to the entry field, which display in the order you must enter them in. As you enter each value into the field the hints will bold, showing that you have completed that part of the SmartKey requirement.
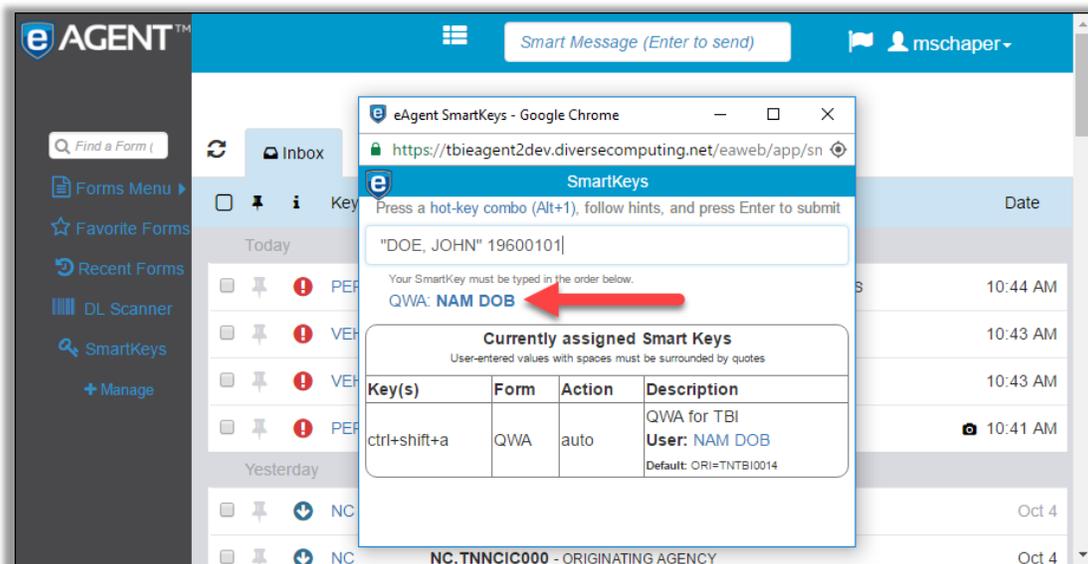
SmartKey entry box hints

8.3   VINassist™

eAgent 2.0 includes VINassist™ functionality to simplify vehicle entry and limit entry errors. There are two ways to use VINassist™ within the application:

1. Run a VIN query through the VIN (Vehicle Info by VIN) form or by using Smart Message.
2. Use the VINassist™ link to populate vehicle information in an EV or EW form. To do this:
    a. Open an EV and enter a VIN in the field. Select the VINassist™ link.
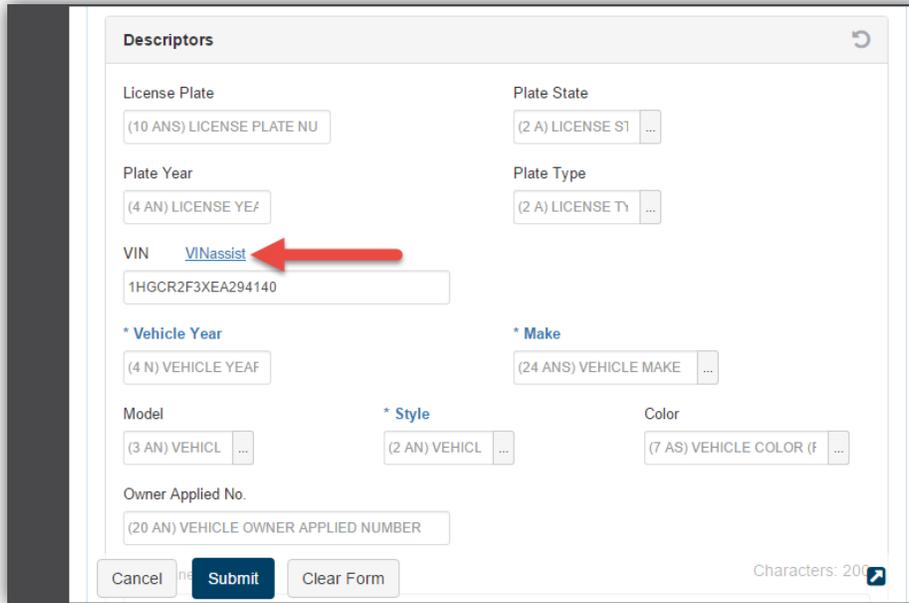
EV form highlighting VINassist™ Link

    b. A notification will pop up with all relevant information for the VIN you entered. Review the information and select **Populate**. All the VIN information will populate into the appropriate fields in the form.
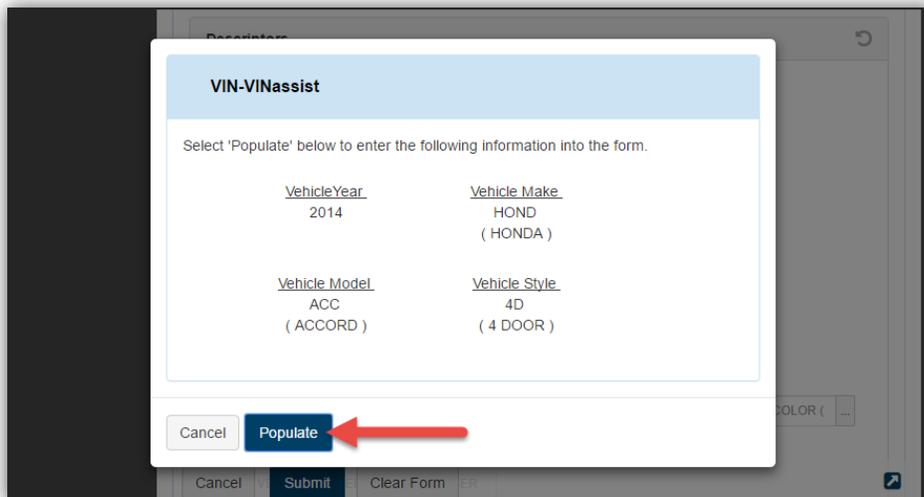
VINassist™ notification highlighting "Populate" button

8.4   Team Inbox

With the Team Inbox feature, users have the option of logging in to a shared inbox. Unlike Agency Mode, only one copy of a message is delivered to this inbox and it is treated as a single inbox regardless of the number of users accessing it or the device they access it from.
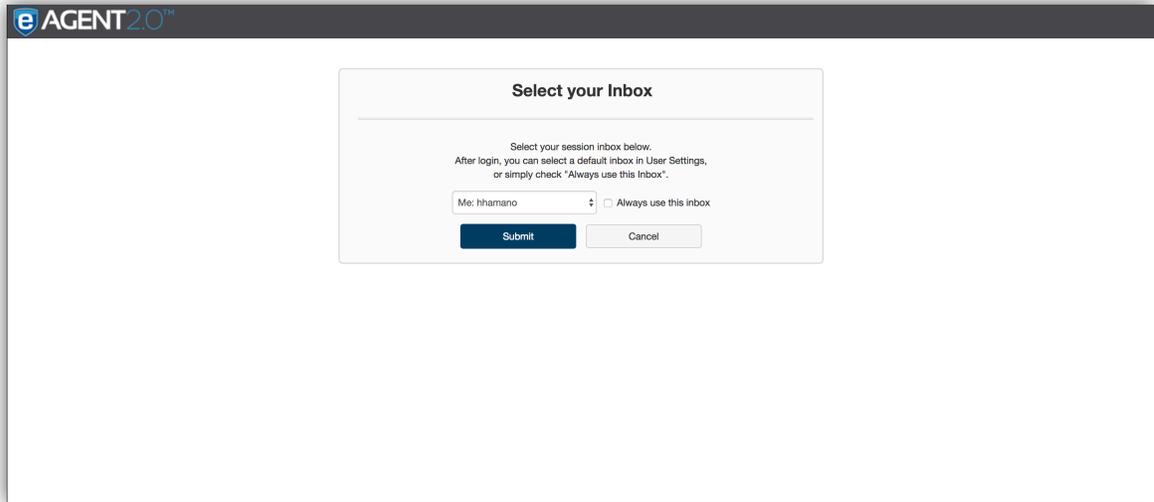
eAgent 2.0 login page

8.4.1 Accessing a Team Inbox

Users who have a Team Inbox assigned to them in the ECM will be able to select an inbox after logging in. Users will see an option for their default profile and all Team Inboxes they have access to.

If users select the checkbox on this page they will always be logged into the selected inbox by default. Selecting a personal inbox as a default option is particularly useful for users who will only rarely need to access their Team Inboxes. The default inbox can be changed any time in user settings.
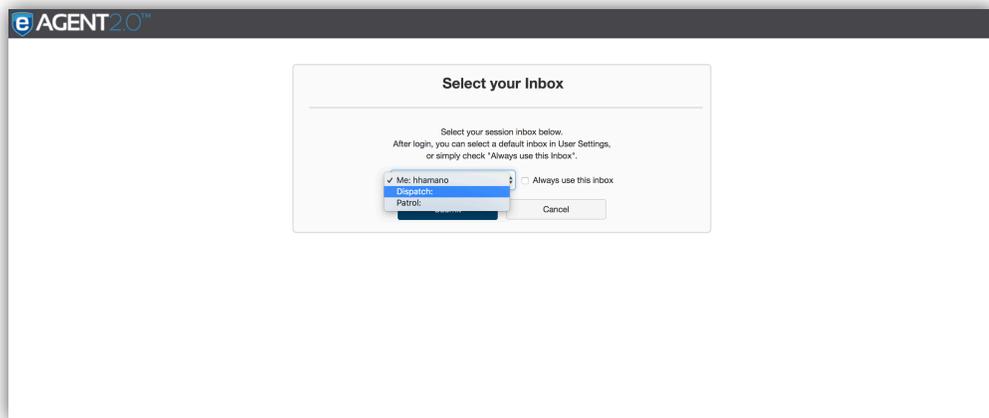
Dropdown menu showing personal and Team Inboxes

8.4.2 Navigating the Team Inbox

Team Inboxes have the same layout as personal inboxes. One distinction is the Team Inbox name located in the side navigation. Selecting the gear icon to the left of the Team Inbox label will open your user settings.
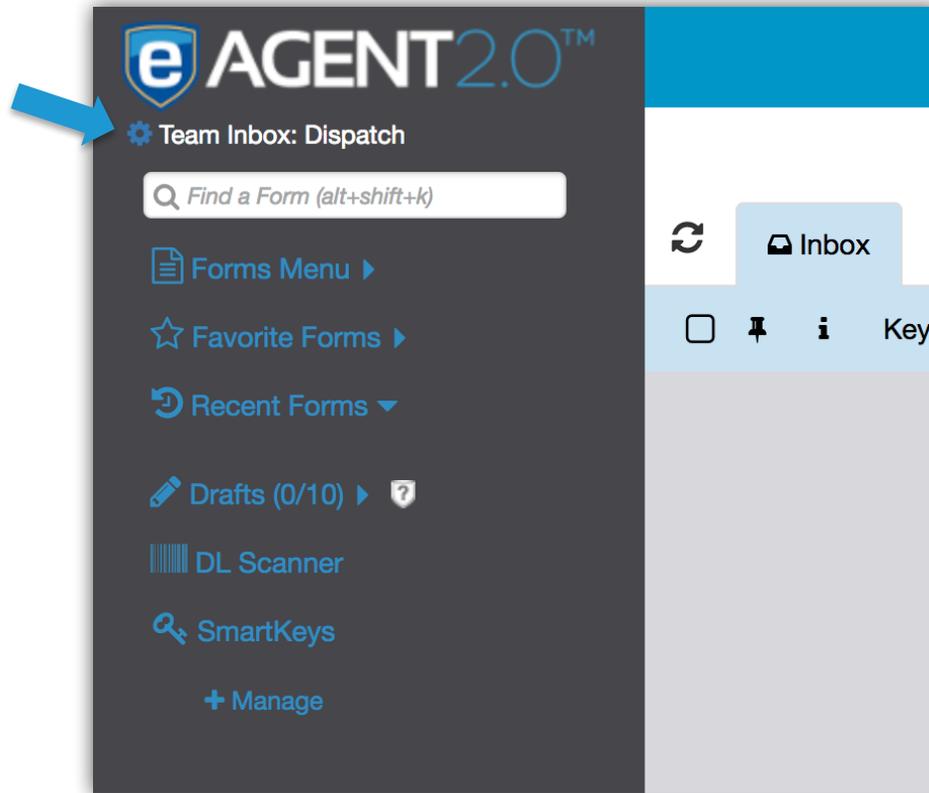
User settings access in Team Inbox

8.4.3 Reading Messages

Once a user opens a message it is marked as read for all users in the inbox. This will update in real time if multiple users are accessing the same inbox at once. Solicited messages display in the inbox with the username of the user that solicited it. This allows for auditing by users even in the shared inbox.

8.4.4 Moving Messages

Pinning or moving to the Archive will affect all users with access to that inbox. If user A pins a message, that message will then also be pinned for user B.

Note that the side navigation is not linked to the inbox. Users are still able to have custom favorites and individual draft messages.

8.4.5 Changing Default Inbox

To change your default inbox or select to have no default set, select user settings from the person dropdown.

Selecting No Default will force the user to select an inbox upon login. Selecting another Team Inbox will make that the default inbox next time the user logs in.

The user must always log out and log back in to access another Team Inbox.
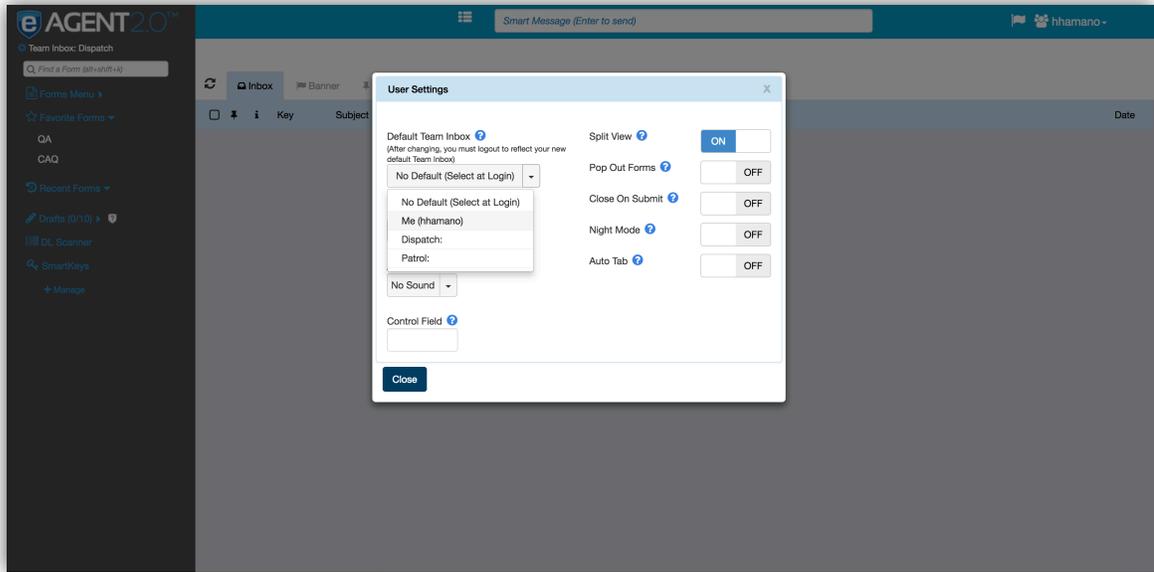
Change default inbox in User Settings window

8.4.6 Search History

Admin and TAC users have the ability to search across Team Inboxes. This can be done on the Search People section of the History tab.

Searches will display results for that inbox even if you are currently logged into a different inbox. Note that you can only search by either username or inbox, but not both.
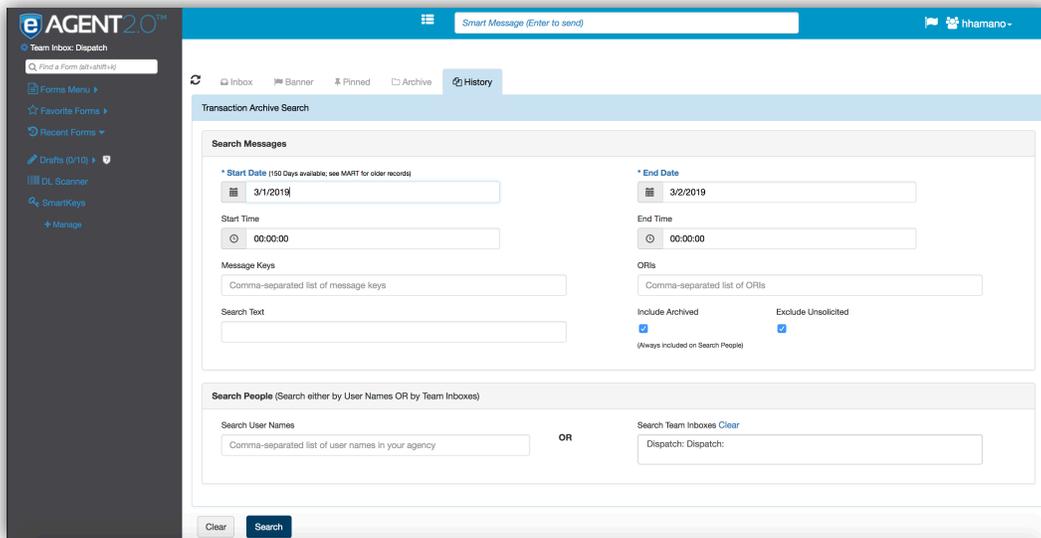
History tab selected in Team Inbox

9 Mobile Environment

Much of the functionality in eAgent 2.0 Desktop is available on mobile platforms. This section reviews the components of eAgent 2.0 on a mobile environment and will familiarize you with its use.

9.1   Inbox

When you first login you will be brought directly to the Inbox, which functions the same in mobile as it does in desktop. The mobile version of eAgent 2.0 collapses the side navigation and condenses its features to optimize the use of space.
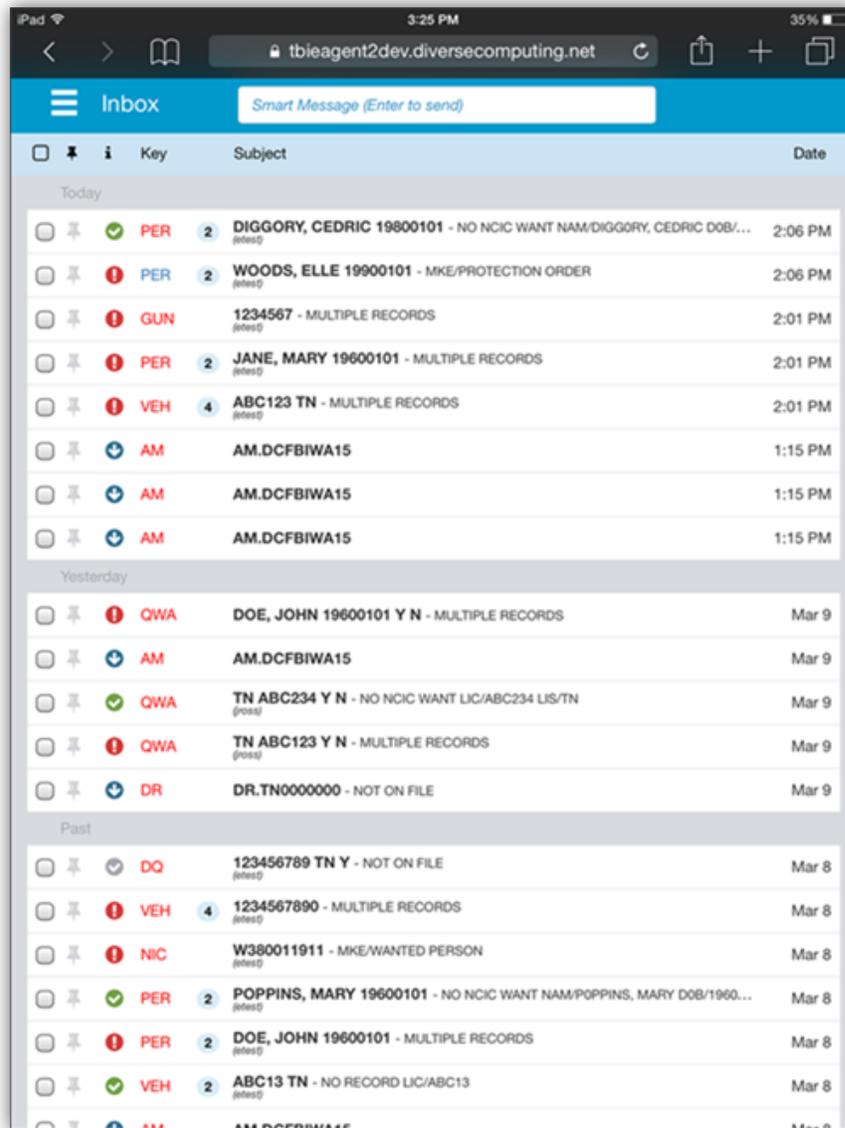
Mobile environment Inbox

9.2   Side Navigation

To access the side navigation in mobile, select the hamburger icon (☰) from the top left-hand side of the screen. The side navigation will popover and allow you to open a different tab or access your favorite and recent forms. The label to the right of the hamburger icon indicates the tab you are currently in.

The tab functionality of a browser is not available in mobile, and if you open a different tab it will instead open in place of the Inbox.
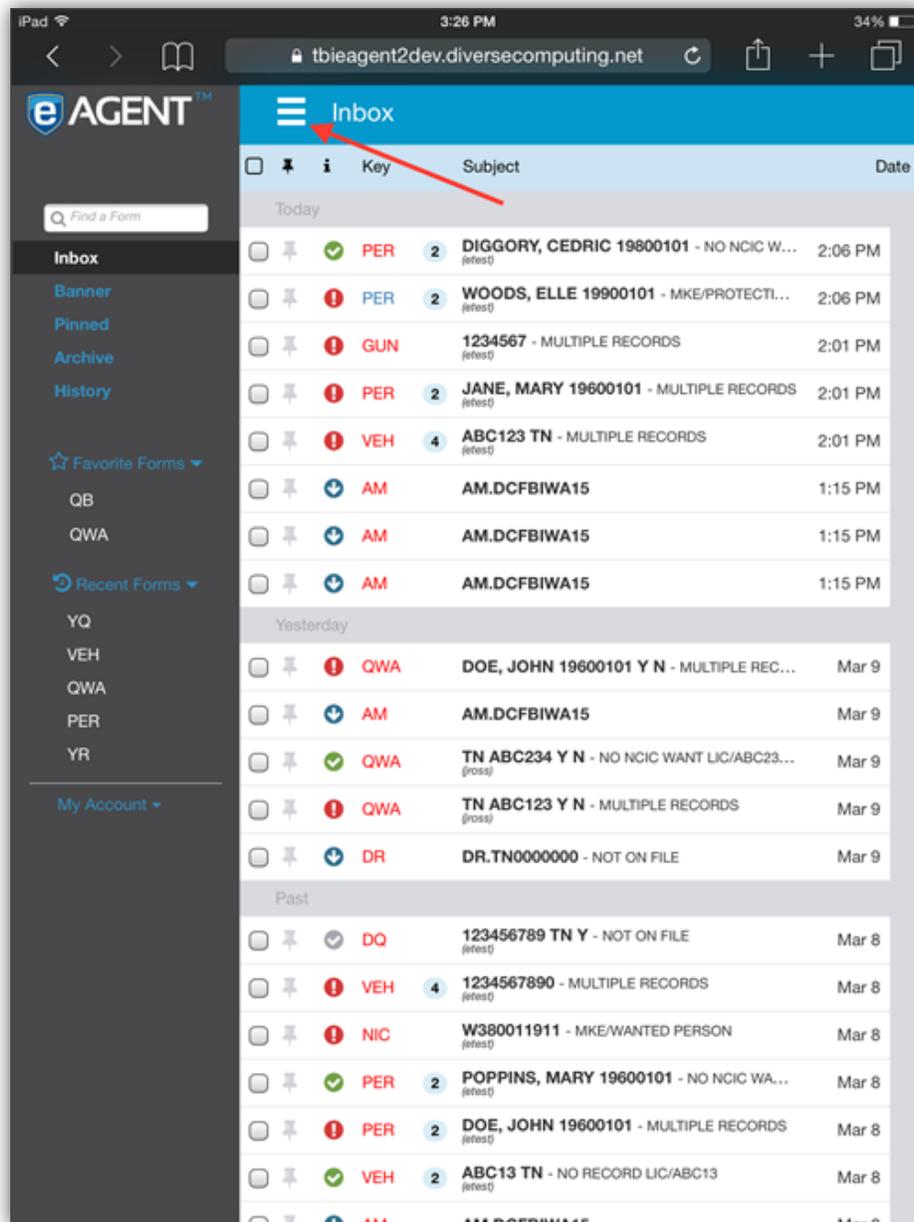
Mobile environment highlighting hamburger icon

The Navigation Panel is also where you will access your account options via **My Account**. You can access all tabs from this menu except the Forms Menu, which is not available in mobile. The

My Account link is where you will access eAgent Help, user settings, and log out of the application.
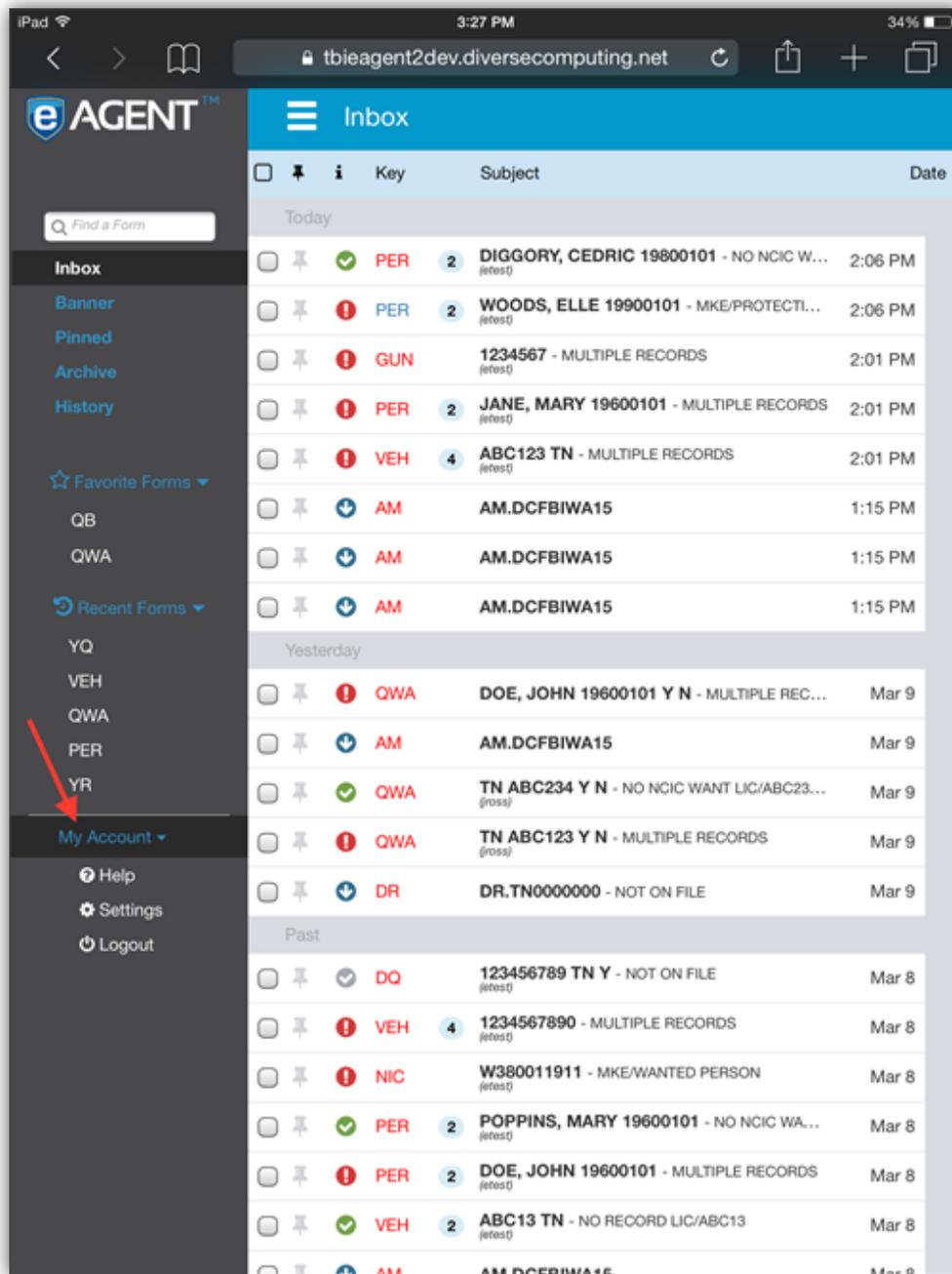
Mobile environment highlighting "My Account" link

After you make a selection in the side navigation, it will automatically close the page and redirect you to your selection. To manually close the side navigation, select the hamburger icon again. If you are on a smaller screen, such as a phone, simply select any space outside of the side navigation to close it.

10 Appendix

10.1   Key Combinations

There are several standard key combinations within the application that allow you to more efficiently use the features of eAgent 2.0. Refer to the following table for these key combinations.

Key Combo	Description
Alt+1	Field Help: when focus is in any field form, shows help for that field.
Alt+1	SmartKeys Help: when focus is in the SmartKeys entry box, shows currently assigned SmartKeys.
Ctrl+.	When focus is on a form field that has an ellipsis, launches code table.
Alt+S	When focus is in a form, submits the active form.
Alt+Shift+K	Opens/Closes find a form search box.
Alt+Shift+O	Displays the ORI dropdown.

10.2   Icons

Icon	Description
🔍	Find a Form; Allows you to search for a specific form by name or MKE.
📄	Forms Menu; Allows you to find forms via a menu tree in the side navigation.
☆	Favorite Forms; Allows quick access for forms you have added as a favorite.
�	Recent Forms; Displays your five most used forms.
|||||	DL Scanner; Allows you to scan a driver's license barcode, or query a person by OLN or OLN OLS.
🔑	SmartKeys; Opens a pop-out with information on smartkeys.
🔄	Refresh Inbox; Allows you refresh your Inbox without refreshing the whole browser.
📥	Inbox Tab; Primary tab where all incoming messages display.
📌	Pin; Allows you to pin specific messages that will display in the Pinned tab.
i	Icon Legend; Hover over this in your Inbox to see a legend for Priority Icons.
🚩	Banner Tab; Allows you to view banner messages in a separate tab from the Inbox.

Icon	Description
	Archive Tab; You can view messages they have chosen to archive. Move to Archive; Allows you to move selected messages to the Archive tab.
	History Tab; Allows you to search for messages.
	Toggle Side Navigation; In mobile you can select this to toggle the side navigation bar. (Note: This icon is white in the application.)
	ORI Dropdown: Users with multiple ORIs can select which one they would like to send for in Smart Message. (Note: This icon is white in the application.)
	User Icon; Allows you to access Settings, Help, and Logout. (Note: This icon is white in the application)
	Help; This provides you with help content to guide you through using eAgent 2.0.
	Settings; You can set various settings to modify your user experience.
	Logout; Allows you to log out of the application.
	Calendar; This displays a calendar for you to select dates within the History tab.
	Time; This allows you to select a start/end time on the History tab.
	Clear Section; Allows you to clear a section of the form, with the exception of defaulted values.
	Create Report; Allows you to generate a sortable report from selected messages.
	Print; Allows you to print a report or message detail.
	Return to Inbox; Allows you to return to the Inbox from the message detail page. (Note: This icon is white on a blue button in the application.)
	Mark as Read; Allows you to mark unread messages as read. (Note: This icon is white in the application.)

10.3 Browser Location Settings

Browser	Enable Location
Internet Explorer 11	1. Click on the tools icon (⚙) from the browser toolbar and select **Internet Options**. 2. Select the **Privacy** tab. 3. Under the Location section, uncheck the box labeled "Never allow websites to request your physical location". 4. Reload the eAgent site and select **Always Allow** under the "Options for this site" drop-down menu when the browser requests to track your physical location.
Microsoft Edge	1. When you first visit the eAgent 2.0 website on the Edge browser, a notification will automatically appear at the bottom of the screen prompting you to let the application use your location. 2. Select **Yes** in order to successfully login.
Safari	1. Click on the System Preferences icon ( ) from the Apple menu. 2. Select the **Security and Privacy** option from the System Preferences window. 3. Select the **Privacy** tab. 4. Make sure the padlock icon on the bottom left corner of the window is unlocked. If not, click it and enter your admin name and password to unlock it. 5. Select **Location Services** from the list of options on the left. 6. Check the box labeled "Enable Location Services", and make sure that the box for the Safari application has a checkmark next to it. 7. Reload the eAgent site and select **Allow** when the browser asks to use your current location.
Mozilla Firefox	1. When you first visit the eAgent 2.0 website using Firefox, a notification should automatically popup asking you if you would like to share your location with this website. 2. Select **Always Share Location** from the drop down menu. 3. If you need to access this notification again, select the globe icon from the browser toolbar (🌐).
Chrome	1. Click on the hamburger icon (☰) in the browser window and select **Settings** > **Show Advanced Settings** from the drop-down menu. 2. Under the Privacy section, select **Content Settings**. 3. Find the Location section and select the option have the browser "Ask when a site tries to track your physical location". 4. Reload the eAgent site and select **Always Share** when the browser prompts you to share your location.