

# Caliber

PUBLIC SAFETY

Protecting Tomorrow–Today.™

## Online RMS

Community Reporting

Agency Admin Guide

May 26, 2020

## REVISION HISTORY

Revised By	Revision Date	Version	Notes
T. Thompson	05/26/2020	1.0	Released Version

## CONTENTS

REVISION HISTORY .....	1
INTRODUCTION .....	3
COMMUNITY REPORTING WITH CUSTOM FORMS .....	4
AGENCY RESPONSIBILITIES .....	4
ADMINISTRATION AND CONFIGURATION .....	5
Permissions and Settings: .....	5
Number Generation: .....	6
Maintenance Values: .....	8
MAKING A CUSTOM FORM PUBLICLY AVAILABLE .....	9
ADDING A PUBLICLY AVAILABLE CUSTOM FORM TO YOUR WEBSITE .....	15
Web Page Modifications: .....	15
Display Configuration Options: .....	16
Sample Display: .....	18
Closing .....	18

## INTRODUCTION

At Caliber, our customers are our priority. In response to COVID-19, we are offering a new product feature to support **Community Reporting** of minor crime, tips, and other police related events. The **Community Reporting** feature leverages the power of **Online RMS Custom Forms** for agencies to embed a public form in an existing website using a couple of lines of HTML code.

With this new enhancement, agencies can create their own Community Reporting public forms using the Custom Forms module and make the forms available to the public via the agency's own website.

**Community Reporting** will help agencies:

- Promote social distancing by reducing officer to public interactions for minor police reports.
- Better service your community by reducing non-essential contacts to make sure officers are available to provide help when emergencies arise.
- Keep officers on patrol and protecting communities by offering an alternate method for the public to report minor police reports without the need to dispatch an officer.

This document provides an overview for how authorized Caliber Online RMS users will take action and manage **Community Reporting** submissions from the public.

## COMMUNITY REPORTING WITH CUSTOM FORMS

**Community Reporting** leverages the power of **Online RMS Custom Forms**. Agencies have full control of creating and managing publicly available **Custom Forms** without the need for additional services from Caliber.

**Community Reporting** easily displays within your agency's existing website, creating a consistent online experience for your community to submit reports online.

### Agency Responsibilities

- Contact your Caliber Customer Success Manager (**CSM**) or enter a support request to sign-up for **Community Reporting**.
  - Caliber will add the **Community Reporting** (Public Custom Form) feature to your agency.
- Agency Administrators are responsible for creating and managing **Custom Forms** or assigning privileges to other agency personnel to create and manage **Custom Forms** for public availability.
- Maintain and Manage your Agency's existing public facing agency website.
- Modifications to your Agency's website to add **Community Reporting**.
  - Caliber recommends that a system or website administrator perform the modifications. See "**Adding a Publicly Available Custom Form to Your Website**" section of this document.

## Administration and Configuration

### Permissions and Settings:

There are two new permissions for public form access and management.

#### 1. User Form Admin – Make Publicly Available

##### Permissions

###### Permission Description

User Form Admin - Make Publicly Available

- This permission controls which RMS user roles have permission to make a **Custom Form** publicly accessible (e.g. **Manage Public Access** button for Custom Form)

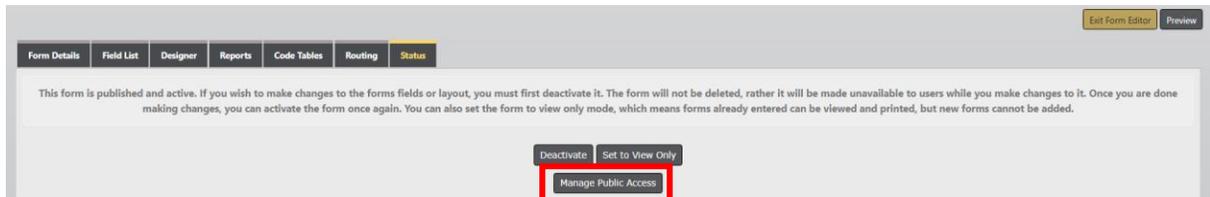


FIGURE 1: CUSTOM FORM - STATUS TAB - MANAGE PUBLIC ACCESS BUTTON

- The **Agency\_Admin** role has this new permission by default. Assign the **User Form Admin – Make Publicly Available** permission to other roles as needed.

#### 2. User Forms – Create Incident From Form permission

##### Permissions

###### Permission Description

User Forms - Create Incident From Form

- This permission controls whether the **Create Incident** option appears to Online RMS users when reviewing publicly available **Custom Forms** submitted by the public.

FIGURE 2: REVIEW PUBLICLY AVAILABLE FORM - WITH CREATE INCIDENT OPTION

## Number Generation:

The **Create Incident** option from publicly available custom forms requires your agency have an active **Number Generation format** configured. If your agency has a Number Generation format configured, you are ready to go and can skip this section. Otherwise, you will need to select one of the below options available to generate an incident report from a publicly available custom form.

1. Generate **Incident Number** from Online RMS (**recommended**).
  - Configure **Number Generation** from the Agency Maintenance page. Go to **Administration menu – Agencies – Select to Edit Agency – Number Generation – Add Number Generation**.
    - Select **Type** of **Incident**
    - Select **Format** (e.g. YYIR00000. YY – 2 digit year, IR – Placeholder (substitute) value, 00000 - # of digits for incident)
    - Enter a **Placeholder** value, such as **CR**. The placeholder value will replace the **IR** value in the selected format.
    - Enter a **Next Number** (Starting #) for the report number (e.g. **1**).
    - Enter **Start** and **End Dates**. Set the end date to the last day of the year (e.g. 12/31/2020). Enter additional formats for 2021, 2022, etc. as desired.

- With this option configured, when selecting **Create Incident** from a publicly available custom form, the user will see that the **Report Number** will **Auto Generate**.

The screenshot shows a web interface for reviewing a form. At the top, there are three tabs: 'Approve Form', 'View Form', and 'Attachments'. Below the tabs is a 'COMMENT' section with a text area containing the text: 'Reviewed community submission and creating incident report to document offense reported!'. Underneath is a 'CREATE INCIDENT' section with a checked checkbox and the text: 'Upon Creation, this form will be associated with the incident. Any information entered here can be changed later.' At the bottom, there is a 'REPORT NUMBER' field with the text 'Auto Generated' inside it, which is highlighted by a red rectangular box.

FIGURE 3: REVIEW PUBLICLY AVAILABLE FORM – AUTO GENERATE # CONFIGURED.

2. Manually enter **Incident Number** from **CAD**.
  - This option is for agencies that use a **CAD system** to generate **Incident/Case Report numbers** for RMS.
    - With this option, users will need to request a case number from **CAD** or self-generate from **Caliber Mobile**.
  - Additional set-up is required to configure RMS to **not** create a RMS incident report from a CAD spill. This will prevent the Case number for generating an incident report in RMS before the officer can generate the incident report from the publicly available **Custom Form**.
    - In **Caliber CAD**, create a **Tracking Number Generator** for **Community reports submitted by the public** and configure a **Type code**.
      - In **Online RMS**, update **XML Doc Options** for the **CAD interface** to ignore the **Case Tracking Number** generator **Type** configure for **Community Reports**. Option code of **IGNORE\_INCIDENT\_TYPES**.
      - If you need assistance, please Contact **Caliber Customer Support**.
  - Within **Online RMS** configure a **Number Generation** format following the steps in **1) Generate Incident Number from Online RMS**, with the following exceptions.
    - Select a **Format** template that matches the **Tracking Number** format configured in **CAD**.
    - Enter **0** (zero) in the **Next Number** field.
  - With this option configured, when selecting **Create Incident** from a publicly available **Custom Form**, the user is required to type the number provided from **CAD** to generate the incident report in **Online RMS**.

FIGURE 4: REVIEW PUBLICLY AVAILABLE FORM – MANUALLY ENTER INCIDENT REPORT #.

## Maintenance Values:

For agencies using **Incident Report Types**, a new **Agency Maintenance** setting is available to default the **Incident Type** for Incident Reports created from a publicly available **Custom Form**. Default the type to an existing **Incident Type** or add a new **Incident Type** for **Community Reporting**.

Schema Maintenance Values			
Keyword	Value	Description	
FORM_INCIDENT_DEFAULT_TYPE	BLANK	Default Incident Type When Creating an Incident from a Custom Form. BLANK is used as a default value when no setting is desired	

- Add a new **Incident Type** by navigating to **Administration menu – Tables – Code Tables** and search by table name of **INCIDENT\_TYPE\_CODES**. If you do not have access to the **Admin Code Tables** page contact Caliber support for assistance with adding a new **Incident Type** to use with **Community Reporting**.
- Enter the new code by navigating to **Administration menu – Agencies – Select to Edit Agency – Agency Settings – Other Tables – Maint. Values – Add Maint. Value – Keyword = FORM\_INCIDENT\_DEFAULT\_TYPE** – set **Value** to the desired **Incident Type Code**.

## Making a Custom Form Publicly Available

**Community Reporting** leverages the power of **Online RMS Custom Forms** for agencies to create and manage their own publicly available forms. If your agency is not familiar with the **RMS Custom Forms** module, please contact Caliber Support to request assistance to help your agency with creating a **Custom Form** for **Community Reporting**.

- **Create a custom form** containing fields you wish to present to the public to complete and submit a public form. Public facing forms support the below **Custom Form Field Types**. Setting a **Custom Form Field** as required will display the field as required and make the field required by the public to submit a Community Report.
  - Date
  - Date & Time
  - Text – Single Line
  - Text – Multiple Lines
  - Checkbox
  - Radio Buttons
  - Select LOV - Single Value
  - Auto Complete
  
- **Publicly displayed data.** In addition to **Custom Form** data fields, the **Custom Form Title** and **Description** fields from the **Form Details** tab, the **Help Text** for each **field type**, and the form **Section Groups** from the **Designer** tab will appear on the agency’s web page when the **Custom Form** is displayed to the public.

The screenshot shows the 'Form Details' tab with the following fields highlighted in red:

- TITLE:** Online Police Self-Reporting Form
- DESCRIPTION:** IF THIS IS AN EMERGENCY PLEASE DIAL 911 NOTE: In the event that this involves shoplifting, you may be asked to come to the Police Department at a later date to file charges and you may also be asked to provide additional documentation regarding the statement or receipt of the stolen items. Once submitted, you will be contacted by a representative of the Police Department within 5 business days. If you have not heard from someone within 5 business days, please call XXX-XXX-XXXX to check the

FIGURE 5: CUSTOM FORM – FORM DETAILS TAB – TITLE AND DESCRIPTION FIELDS

FIELD TYPE	LABEL	FIELD ID
Text - Single Line	Best time of day to be contacted	SELF_CRIME_BEST_TIME
REQUIRED	DISPLAYED	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
HELP TEXT		

The 'HELP TEXT' field in the table is highlighted with a red border.

FIGURE 6: CUSTOM FORM - FIELD TYPE - HELP TEXT.

The screenshot shows a window titled "Questions" with a red border. It contains several questions, each followed by three radio button options labeled "Test1", "Test2", and "Test3". The questions are:
 

- Do you know that filing a false police report is a crime?
- Are you eighteen (18) years of age or older?
- Did the incident occur within the City limits?
- Do you know who committed this crime?

 Below the questions is a text input field with the prompt "If yes, provide any known suspect information". At the bottom, there is a "Choose One" label followed by three radio button options labeled "Test1", "Test2", and "Test3".

FIGURE 7: CUSTOM FORM DESIGNER - SECTION GROUP HEADERS

- Configure Security, Role Access, and Form Types on **Custom Form Details** Tab.
  - Set the **Default Security Level** at a Level equal to the lowest level of the user security you want to access the form. As an example, Officer.

The screenshot shows a dropdown menu titled "DEFAULT SECURITY LEVEL". The selected option is "Patrol Officer".

FIGURE 8: CUSTOM FORM – FORM DETAILS TAB - SECURITY LEVEL.

- Set the user **Roles** that will have access to view the **Public Custom Forms** within Online RMS. It is suggested, these **Roles** be the same as **Roles** configured on the **Routing** Tab to Review Forms submitted by the public.

The screenshot shows a field titled "ROLES" with a search icon. Two roles are selected and displayed in tags: "OFFICER" and "OFFICER\_SUPERVISOR".

FIGURE 9: CUSTOM FORM - FORM DETAILS TAB - ROLES.

- For **Publicly Available** forms that you want to **Create Incidents** from the submission, you must **Set** the **Form Types** to **Freestanding Forms** and **Incidents**.

The screenshot shows a field titled "FORM TYPES" with a search icon and a help icon. Two form types are selected and displayed in tags: "Freestanding Forms" and "Incidents".

FIGURE 10: CUSTOM FORM - FORM DETAILS TAB - FORM TYPES.

- Configure **Routing** for **Custom Form**. Select the **Custom Form Routing** tab.
  - Check the **Enable Routing For this Form** checkbox.



FIGURE 11: CUSTOM FORM - ROUTING TAB - ROUTING ENABLED.

- The **Routing Options** checkboxes **do not apply** to publicly submitted forms. Checking these will not have an impact on publicly available **Custom Forms**.

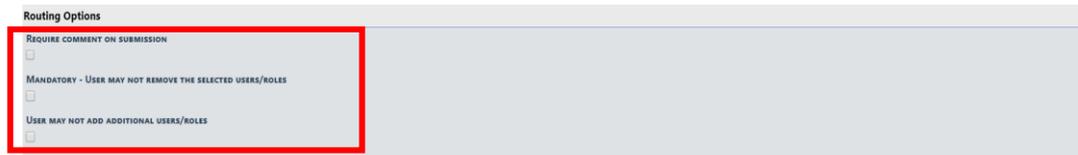


FIGURE 12: CUSTOM FORM - ROUTING OPTIONS - DO NOT APPLY TO PUBLICLY AVAILABLE FORMS.

- Notification options** – Select individual users and/or Roles to notify.
  - User Routing Options** - Select individual users to notify when a public form is submitted.

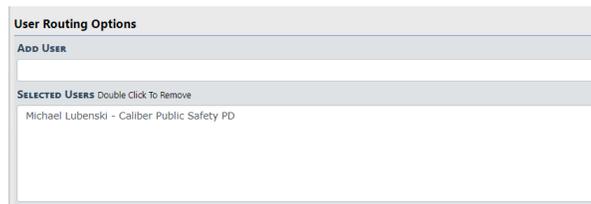


FIGURE 13: CUSTOM FORMS - ROUTING OPTIONS - ADD USERS AS DESIRED.

- Role Routing Options** – Select user **Roles** to notify when a public form is submitted.

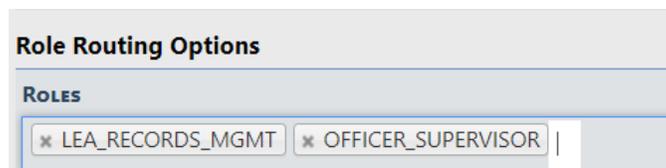


FIGURE 14: CUSTOM FORM - ROUTING OPTIONS - ADD ROLES AS DESIRED.

- **Agencies –**
  - Leave blank to route to the agency defined on the Token for the public available **Custom Form (recommended)**.
  - Add an agency if you wish to route to a different agency than designated on the Token for the public available **Custom Form**



FIGURE 15: CUSTOM FORM - ROUTING OPTIONS - ROUTE AGENCIES AS DESIRED.

- **Manage Public Access.** Select the Custom Form **Status** tab.
  - Select the **Manage Public Access** button. This option will only appear for users having a role with the **User Form Admin – Make Publicly Available** permission.

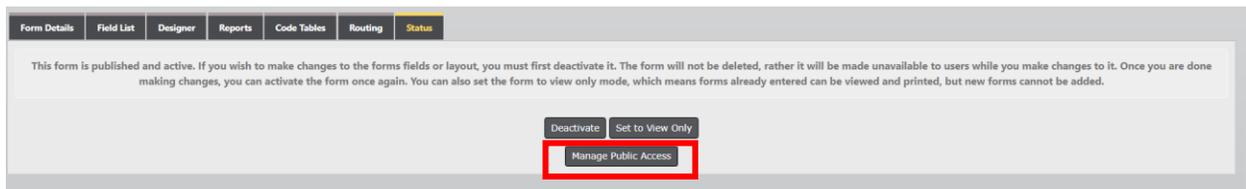


FIGURE 16: CUSTOM FORM - STATUS TAB - MANAGE PUBLIC ACCESS.

- Select **Create Token**.



FIGURE 17: CUSTOM FORM - MANAGE PUBLIC ACCESS - CREATE TOKEN.

- **Select the Agency** as the agency to **Save** for this **Custom Form**.
  - The form will route to this agency, unless a different agency is specified on the **Custom Form Routing Options** tab.

- Enter **Allowed Domain(s)**.
  - This will be the domain of the agency’s website, where the public form will be available. As example, if your website is, [www.myagency.com](http://www.myagency.com) you would enter **www.myagency.com** for **Allowed Domains**.

Create Public Access Token

Select the Agency This Form Will Be Saved To And Specify Allowed Domains

**SELECT AN AGENCY**

City Police Department

**ALLOWED DOMAINS (E.G. MYAGENCY.COM, COUNTYSHERRIFF.COM)**

myagency.com

Cancel Save

FIGURE 18: CUSTOM FORM - MANAGE PUBLIC ACCESS - TOKEN SETUP.

- A unique **Token ID Number** will generate for the agency and form combination upon saving.
  - Copy the **Token**, using your mouse to highlight and pressing the **Ctrl + C** keys on your keyboard at the same time.
  - Your website administrator will need the token to add the custom form to your website’s website (see “Adding Custom Form to Website” section).

Agency	Token
Caliber Public Safety PD	a21e1d1d-e578-4fe1-a57a-ed7868173b46

FIGURE 19: CUSTOM FORM - PUBLICLY AVAILABLE TOKEN

- For Multi-tenant sites or agencies configured as an Organization with sub-agencies, the same custom form can be made publicly available on different websites or web pages within the same website to route public submissions of the form to different agencies.
  - Select to **Create Token** and enter the information to generate a unique token for each agency and website/page combination.
    - Enter the token on the appropriate web page.

- When the public completes and submits the form from your website, a **Custom Form** submission will generate for the agency associated to the Token ID used to embed the public form on that web page.

Agency	Token
Burlington Police Department	59c40c00-ea85-40a6-96d6-503ea1549459
Caliber Public Safety PD	b27fdfe7-fecc-4686-97a9-dc6c98c91317
Model County	37acd52f-7ec2-4749-9573-20d7e2ffb95b

FIGURE 20: CUSTOM FORM - PUBLIC TOKENS FOR MULTIPLE AGENCIES - SHARING SAME FORM.

- When finished with the **Custom Form**, click on the **Status** tab and select  .
  - **Important Note: Public Custom Forms** are **not** accessible from your website until the form is activated.
  - If a **Public Custom Form** is **not** activated, the public will see the below error when navigating to the web page you configured to display the **Public Form**.



### ERROR RETRIEVING FORM: 404

Form ID: b27fdfe7-fecc-4686-97a9-dc6c98c91317

Environment: demo

Is the form active for Public Access?

Is 'community.public-safety-cloud.com' an Allowed Domain?

FIGURE 21: WEB PAGE ERROR IF CUSTOM FORM IS NOT ACTIVATED.

## Adding a Publicly Available Custom Form to Your Website

**Community Reporting** easily displays within your agency’s existing website, creating a consistent online experience for your community to submit reports online. **Publicly available custom forms** inherit the look & feel of its surroundings on your website, making it appear as if it were an original part of your web page.

**Caliber recommends that a system or website administrator perform the following modifications** to your existing website, as the specific way in which your website works may vary greatly from that of other agencies.

### Web Page Modifications:

The source of an existing web page is typically structured with an invisible **<head>** section (which contains many of the needed resources, such as JavaScript and CSS), and the **<body>** section which is displayed in the end user’s internet browser. **Community Reporting** requires the addition of one line to the end of the **<head>** section, and one line within the **<body>** section *where the custom form information should display*.

Below is a simplified example of a web page and how it should be modified to enable Community Reporting. **NOTE:** The “id” is the Token ID generated for the **Custom Form** in **Online RMS**. The **id="12345678-abcd-1234-abcd-1234567890ab"** in the **<caliber-custom-form>** section **must be changed to use the Token generated** for your **Custom Form** in **Online RMS**. The yellow highlighted lines must be added to your existing website.

#1

```

<html>
  <head>
    <!-- (Existing content) -->
    <!-- ... -->
    <!-- Add the following line for Caliber Community Reporting -->
    <script src="https://community.public-safety-cloud.com/assets/custom-form-
bundle.js" crossorigin=""></script>
  </head>
  <body>
    <!-- (Existing content) -->
    <!-- ... -->

```

#2

```

<!-- In the desired location, add the following line for Caliber Community Reporting -->
<caliber-custom-form id="12345678-abcd-1234-abcd-1234567890ab">
</caliber-custom-form>
<!-- ... -->
</body>
</html>

```

1. The **first modification (#1)** tells the internet browser where to find the JavaScript that displays the **Custom Form** from **Online RMS**. **Do not modify the contents of this line.** Any changes to this line may cause the **Custom Form** not to display and may break other functionality of your web page.
2. The **second modification (#2)** identifies the location in your existing website where the **Custom Form** should display. You **\*MUST\*** update the `id="12345678-abcd-1234-abcd-1234567890ab"` to use the Token generated for your **Custom Form**.

### Display Configuration Options:

There are four (4) optional configuration settings that can be added to the `<caliber-custom-form ...></caliber-custom-form>` line. These configuration options are shown below with their default values.

Configuration Options	Description
<code>hide-images="false"</code>	Hides the section of the form that allows the end-user to submit a JPEG image which will be attached to the <b>Custom Form</b> in <b>Online RMS</b> .
<code>hide-title="false"</code>	Removes the <b>Custom Form's Title</b> from the form when displaying on your website. This may be useful if the web page has an existing title/heading that you prefer to use.
<code>hide-description="false"</code>	Removes the <b>Custom Form's Description</b> from the form when displaying on your website. This may be useful if the web page has an existing description that you prefer to use.
<code>hide-section-headers="false"</code>	Removes the <b>Custom Form's Section</b> Group label from the <b>Custom Form</b> field designer when displayed on your website.

- If you desire different display options than the default values, you can override the default values by adding the appropriate configuration option to the **caliber-custom-form ...</caliber-custom-form>** line and setting the value to **“true”**.
  - As example if you do not want to have the **Custom Form Title** displayed on the web page, you would use the following code. The **id** is the **ID** generated for your **Custom Form**.

```
<caliber-custom-form
  hide-title="true"
  id="12345678-abcd-1234-abcd-1234567890ab">
</caliber-custom-form>
```

- Below is an example of all available configuration options. The **id** is the **Token ID** generated for your **Custom Form**.

```
<caliber-custom-form
  hide-images="false"
  hide-title="false"
  hide-description="false"
  hide-section-headers="false"
  id="12345678-abcd-1234-abcd-1234567890ab">
</caliber-custom-form>
```

## Sample Display:

**Publicly available custom forms** inherit the look & feel of its surroundings on your website, making it appear as if it were an original part of your web page.

Below is a simple example of how a Public Custom Form will display within your agency's website. The **Title**, **Description**, **Section Headers**, and **Questions** will be specific to the **Custom Form** you created.

The screenshot shows a browser window with the Caliber Public Safety logo and navigation menu. The main content area displays a form titled "Online Police Self-Reporting Form". The form includes a description, a "Questions" section with several yes/no questions, and a text area for suspect information. A sidebar on the right contains contact support information and a "CONTACT SALES" button. Red boxes and arrows highlight the Title, Description, Section Headers, and Questions sections of the form.

FIGURE 22: SAMPLE DISPLAY OF A PUBLIC CUSTOM FORM

## Closing

If you are interested in using the **Community Reporting** Feature or have questions about creating and managing **Custom Forms** for Public Availability, please contact your CSM or Caliber Support.