

Online RMS

11.11

Admin Guide

6 December 2022

Caliber Public Safety Online RMS 11.11 Admin Guide 6 December 2022

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COLOSSUS, INCORPORATED, 102 West Third Street, Suite 750, Winston-Salem NC 27101.

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Phone (24/7 support line):	800.274.2911
Fax:	336.722.3479
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Before you call, e-mail or fax, please gather the following information:

- Whether all users are affected
- Any error messages on the screen
- Any efforts made to correct a situation
- Duration of the problem

This information will help us serve you more efficiently and accurately.

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Chapter 1. Introduction

Access Administration

Use the following procedure to access Online RMS Administration.

1. Open the RMS application to the *Home* page to display the Navigation bar as shown.

Collber Administration - Incidents - Master Indices - Records Management - Forms And Reports - Help -

- **Note:** The icons/labels vary in the Navigation bar depending upon which areas your assigned roles allow you to access. For example, if none of your roles include working with incident reports, you would not have an Incidents icon/label in your Navigation bar.
- 2. Perform one of the following steps:
 - Click on the *Administration* label to display the drop-down menu and select the appropriate option.



Note: On the *Administrative Home* page the icons are arranged in functional groups as shown in the screen examples below.

• Click the *Administration* label, then click *Administration* again from the drop-down menu to display the *Administration Home* page as shown.

System			System Administration		
ຄ		Else .	This option available for state-wide	SELECT SYSTEM	
Manage Sys	tem	Agencies (77)	configuration only	ISP Test (TSTC)	
Security				Miscellaneous	
*		&	4	120 A	
Roles (45	o) Sec	curity Groups (10)	Users (223)	Reports	Message Center
				=	
Maintenance				Technical Notes Log	Training Videos
\$					
Permissions	2262)	Tables	Custom Forms		
Module Ad	min				
Administrative					
		Ê			
View Cac	ne	Auditing			

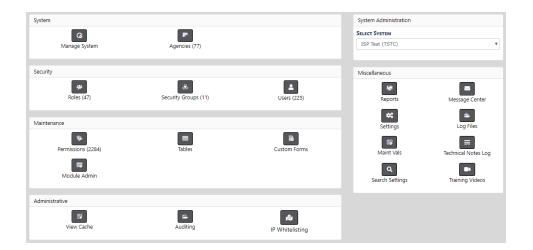
Note: The appearance of the menu and page varies depending upon your agency's set-up.

3. Click the appropriate icon to open the portion of the program in which you want to work.

Levels of Administration

Company Level

The first and top level of administration is the company level. Only Caliber Public Safety personnel can administer application functionality at this level.



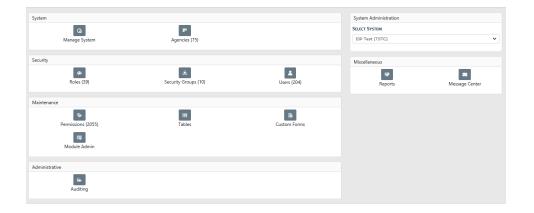
For agencies having security requirements to not allow access to Caliber Online RMS outside of approved networks, Caliber Public Safety personnel can define the following settings via the **IP Whitelisting** icon under the *Administrative* section:

- Define Authorized IP ranges for client network requests.
- Bundle with 2FA for access outside of IP ranges.
- Requires a system admin or Caliber DBA to configure.

P Range		
Agency		Active
All Agencies	~	
Addresses		
	To specify a range, use a '-' (es of IP addresses below, one per line. hyphen) to denote the range. .1 - 10.2.2.2
10.0.1.1 - 10.2.2.2 10.19.152.2		

Schema Level

Another level of administration is the Schema Level. Each agency has their own schema, unless they are a multiple agency schema. Another example might consist of administration of law enforcement agencies using Online RMS within a county or district; for example, the sheriff's office and all police departments within a specific county.



Agency Level

The third level of administration is at the agency level. This level applies to administration of an individual agency that uses Online RMS. The following *Administrative Home* page shows the features available to administrators with this level of access.

System		Miscellaneous	
gr. Agency		स्टि Reports	Message Center
Security			
ی Security Groups (1)	Users (9)		
Maintenance			
Custom Forms	Eig Module Admin		
Administrative			

Within the system, all users, including administrative users, are defined by the roles and permissions assigned to them. The features and functions available to individual users vary considerably. "Roles and Permissions" below for more information.

Roles and Permissions

Once a user has been added to an agency, that user can log into the system but has no access to system features until his/her roles have been assigned. Caliber Public Safety develops roles for each type of personnel employed by an agency, and these roles consist of permissions or privileges. Several permissions are used to make up each of the various roles used by an agency.

Because system tasks performed by one user (for example, an officer) differ from those performed by another user (for example a patrol supervisor), the two roles also differ. Certain users are given permissions to perform specific tasks within the system by the

Officer role while other users are given permissions to perform other tasks by the Patrol Supervisor role.

- A user must be assigned at least one role in order to perform tasks within the system.
- A user can be assigned more than one role.
- Two different roles may include one or more of the same permissions, but within a specific agency, each role is unique in its permissions make-up.
- Certain users may be able to delegate some or all their permissions/privileges to another user for a period of time.

Master Index Security

User access to master index data in Online RMS is controlled by **Master Index Security**, a hierarchical design where **Level 1** is the lowest and **Level 3** is the highest security. The Security Level exists on every master index record, and on each user account, to control data access. The **Master Index Security** applies to all master indices: Person, Address, Organization, Vehicle, Property, and Gang.

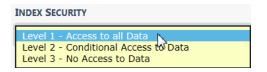
Master Indices Security Levels



- Level 1
 - No security restrictions to the master index record.
 - The default level for new master indices records.
- Level 2
 - Conditional security in place to restrict viewing of involvement data from the indices summary page.
- Level 3

- Restrict viewing of the master indices in searches and displaying on event records.

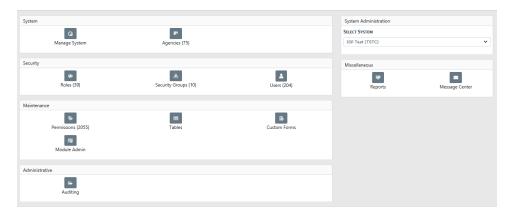
User Account Index Security Levels



- Level 1
 - View full details of master index records having Security Level 1.
 - Only view the indices demographic information for master indices records having **Security Level 2**.
 - And, Not see master indices records that have Security Level 3.
 - The default level for all new user accounts.
- Level 2
 - View the full details for master indices records having Security Level 1.
 - View the details for master indices records having Security Level 2.
 - And, Not see master indices records that have Security Level 3.
- Level 3
 - View the full details for master indices records having Security Level 1.
 - View the full details for master indices records having Security Level 2.
 - And, view the full details for master indices records having Security Level 3.

Chapter 2. System Administration

The *Administrative Home* page has a **System** section which may contain one to three icons, depending on user privileges.



If a particular schema has more than one agency involved, there will be a **Select System** selection list in the upper right corner of the screen. If you are an administrator with permissions for multiple agencies, use this drop-down list to select an agency. Most administrators, however, only have permissions in one agency.

System Information

Use the following procedure to edit data on the **System Information** tab of the *Manage System* page.

- From the Administrative Home page, click the Manage System icon to open the Manage System page. For details on accessing the Administration Home page, refer to "Access Administration" on page 1
- 2. If needed, click the System Information tab to bring it to the front as shown.

Caliber	Administration -	Incidents 🔻	Master Indices -	Records Mar	nagement -	Forms And Repo	orts 🔻 🛛	-lelp 👻	≗ - 98/0 æ ↔
									Go Back Update
System Informat	ion Quick Links								
COUNTY CODE					WEBSITE				
350									
COUNTY NAME					PHONE				
ISP Test (TSTC)									
COUNTY DESCRIPTION	л				Fax				
				11					
System Admin	istrators								
Select User									▼ Add
Mailing Addres	55								
ADDRESS 1					ADDRESS 2				
111									
Спу			STATE			Z	P		
Indianapolis			Alaska			T	82116		
Application Se	ttings								
INDEX ALLOWABLE	Hours				JUVENILE AGE				
100					17				
PASSWORD ATTEMP	TS ALLOWED				INACTIVE DAY	S ALLOWED			
3					60				
				Go Back	Update				

- 3. Make changes as needed to the fields in the **System Information** section. The County Code and County Name are read-only, they are not modifiable.
- 4. Select the System Administrator from the list.
- 5. Make changes as needed to the fields in the Mailing Address section.
- 6. Make changes as needed to the fields in the Application Settings section.
- 7. Click **Update** to display the message, *System updated successfully*.

Quick Links

Your agency administrator can preset **Internal Quick Links** and **External Quick Links** for the agency, making them available to all users with appropriate permissions who want them on their Home Page.

- Internal Quick Links provide quick access to areas within Online RMS.
- External Quick Links provide quick access to external URLs.

Use the following procedure to add or edit links on the **Quick Links** tab of the *Manage System* page.

1. Click the **Quick Links** tab to bring it to the front as shown.

Internal Quick Links			Add Internal Quick Li
Quick Link	Category	Agency	Actions
Address	Default Links		1
Approve Incident Report	Reports	District 42, Versailles	er i
Broadcast Messages	Default Links	District 21, Toll Road - SC	e 🔒
Create Field Arrest	RMS	District 16, Peru - GA	ce* 💼
Custom Forms Search	RMS	District 16, Peru - GA	1
Evidence Management Module	RMS	State of Mark	6
Field Arrests	Default Links	District 21, Toll Road - SC	e 1
INVENTORY	RMS		2
Person Search	Default Links	District 16, Peru - GA	2
Tow/Impound	RMS	District 34, Jasper	C 🖬
Transfer	Default Links	District 42, Versailles	1
View CAD Calls	RMS		2
View Incident Report	RMS	District 16, Peru - GA	1
x	Master Indices	All Other	C 🛙
External Quick Links			Add External Quick Li
Quick Link		Agency	Actions
Approve Incident Report - External	1	District 42, Versailles	ef 🔒
IPSC Home Page	1	District 21, Toll Road - SC	12° 🖬
Indiana General Assembly	1	District 21, Toll Road - SC	e 🕫
State Statutes			C 1

2. You can edit an existing link or add new.

a. To Edit

- In the Internal Quick Links or External Quick Links grid, locate the link you

want to edit and click the edit icon under the Actions column display the Edit Internal Quick Links window.

Internal Quick Link	Internal Quick Link
QUICK LINK NAME	
Approve Incident Report	
LINK	
Approve Incident Report	~
CATEGORY	
Reports	~
AGENCY	
District 4	~
	Cancel Save

Internal Quick	: Link External Quick Link
LINK NAME	
Approve Incider	nt Report - External
URL	
https://1	/rms/ApprovalIncReport.do?dispatchto=getRecen
Agency	
District 4	· · · · · · · · · · · · · · · · · · ·
	Cancel Save

- Select and type changes in the fields as needed.

b. To Add New

- Click Add Internal Quick Links for an internal link, or click Add External Quick Links for an external URL to open the associated Quick Link window.
- Give the Quick Link a **Name**.
- Provide the remaining information.
- 3. Click Save to save the changes.
 - **Note:** The users with appropriate permissions can choose which available Quick Links they want to display on their Home Page. Refer to the *Caliber Online RMS User Guide* for more information.

Chapter 3. Attachments

Attachments Overview

Attachments are files that are accessed by other programs, such as a picture, document, spreadsheet, etc. These files are uploaded and saved to Online RMS modules that support attachments. For example, mugshot attachments could be uploaded and saved to person records, or mechanic hand-written quotes uploaded to Fleet Vehicle records.

Attachments appear in a grid, or columnar format.

Attachments Add Attachment				
Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	± 🗹 💼

You can edit and delete attachments that were only created by you. Users with administrator privileges have the ability to edit and delete attachments for any user.

Click on the **Image Library** link to access your personal RMS image library that contains images uploaded by you from a mobile device, or other devices. For more information on the **Image Library**, refer to the *Image Library* chapter of the *Online RMS User Guide*.



Add Attachments

Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to add. For example, to add an Attachment tied to a person, go to that person record and page down to the **Attachment** section, then follow the directions below.

Ø Attachments			🖪 Image Libr	ary 😋 Add Attachment
Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1		09/25/2012	1 C 💼

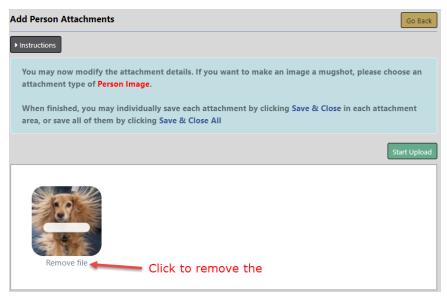
1. Click on the Add Attachment link to begin the upload process. For information on the Image Library link, refer to "Attachments Overview" on the previous page.

Note: By using the **Add Attachment** link, attachments are added to a temporary holding place or queue; you must then upload the files.

a. Drag files to the Queue or click Here to add files from Windows Explorer.

 Instructions Click to dis 	play instructions	
You may use this to upload pdf,j greater than 10 megabytes.	ipg,jpeg,bmp,png,doc,docx,xls,xlsx,txt,ppt,vsf,pptx files. Files must	be no
You may upload a maxiumum of	f 10 files at once.	
Once you have uploaded the file	s, you will be able to add descriptions / edit file names / etc	
	Sta	art Upload
Option 1: Drag and drop files into this box	Drop Files Here, Or Click Here to Add Files Option 2: Click on the word Here to add files	

b. When all the files are in the **Queue**, click **Start Upload** button to add the attachments. Click on **Remove File** to remove from the Queue.



Note: To abandon the upload process and return to the previous window click the **Go Back** button.

c. Modify the attachment details when the following dialog window appears.

Person Image	✓ Imag	e	
FILE NAME	DATE 0	f Info	
Fred_Flintstone.png	06/14	4/2021	
Рното Туре	PRIMARY IMAGE	PHYSICAL DESCRIP	PTION
Mugshot - Profile 🗸 🗸		Height: 5' 04";	Weigh 🗸
DESCRIPTION			
	Save & Close		

- d. Click **Save & Close** to save each attachment individually, or click **Save & Close All** to save all of them at once.
- e. The attachments then appear in the **Attachments** grid. You can view additional information, download, edit, or delete the attachment.
- **Note**: Up to ten (10) items or a maximum of 10 megabytes per file can be uploaded at one time. Agencies may purchase a Rich Media Package that allows file uploads with a max of 50 MB per file and rich media file types.

Edit Attachments

Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to update. For example, to update an Attachment tied to a person, go to that record and page down to the **Attachment** section, then follow the directions below.

1. Click the edit icon on the record you need to update.

Attachments Edit Image Library O Add Attachments				orary 🔁 Add Attachmen
Keyword	File Name	Description	Date of Info	Actions
Mugshot - Front	383_1	Dow	09/25/2012	

Note: You cannot update attachments created by another user.

2. Make the necessary updates in the Edit window.

Note: The content of the **Edit** window will vary by module and file type. The **Edit Person Attachment** is used for illustration purposes.

Edit Person Attachment Go f	Back
ATTACHMENT TYPE	
Person Image	~
KEYWORD	
Image	~
FILE NAME	
383_1	
DESCRIPTION	
РНОТО ТУРЕ	
Mugshot - Front	~
PRIMARY IMAGE	
PHYSICAL DESCRIPTION	
Height: 5' 10"; Weight: 195; Eye Color: Blue; Hair Color: Blond or Strawberry; Hair Style: Braided; Hair L 🗸	0
DATE OF INFO	
09/25/2012	#
Update	

3. Click **Update** to update the record, or click **Go Back** to return to the previous window without saving.

Delete Attachments

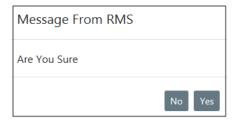
Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you need to delete. For example, to delete an **Attachment** tied to a person, go to that record and page down to the **Attachment** section, then follow the directions below.

1. Click the delete icon a on the record you want to delete.

Attachments Edit Image Library			brary 🔂 Add Atta	hmeni ete	
Keyword	File Name	Description	Date of Info	Actions	Ļ
Mugshot - Front	383_1	Dow	09/25/2012		

NOTE: You cannot delete attachments created by another user.

2. A confirmation window appears. Click **Yes** to delete or **No** to return to the previous window without deleting.



Download Attachments

Several Online RMS modules support **Attachments**. Access the module and record that contains the **Attachment** you want to download. For example, to download an **Attachment** tied to a person, go to that record and page down to the **Attachment** section, then follow the directions below.

1. Click the download icon on the record you want to download.

Attachments Edit Image Library O Add Attached					nmen te
Keyword	File Name	Description	Date of Info	Actions	
Mugshot - Front	383_1	Dow	09/25/2012	- 2 0	Ē

- 2. The file downloads automatically to your local machine.
- 3. Click on the file to open.

Chapter 4. Manage Agencies

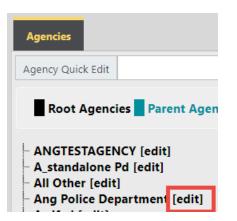
Manage Agencies Overview

To access this option from the Online RMSHome page, perform one of the following tasks:

- Click on the **Administration** top menu option to display the drop-down menu, then select the **Agencies** option.
- Click the Administration top menu option, then click Administration from the drop-down menu to open the Administration page, then click the Agencies icon.

To add an agency, refer to "Add Agency" on page 74 for more information.

To update an agency, click **[edit]** next to an agency name to open the existing *Agency Profile*.



Refer to "Agency Profile" below for agency profile details.

Agency Profile

From the *Manage Agencies* page, click **[edit]** next to an agency to open the *Agency Profile* page for that agency. The *Agency Profile* contains up to six tabs. You may or may see all tabs, depending on your permissions.

gencies / Agency Profile						
			Go Back	Update	Man	age Agency Credentia
Agency Information - Ang Police Department Sub Agen	ncy Agenc	y Organization	Number Generation	Quick L	.inks	Agency Settings
Agency Information						
AGENCY INTERNAL CODE		ORI NUMBE	R			
ANGPD						
AGENCY DISPLAY CODE		WEBSITE				
ANGPD						
AGENCY CODE DISPLAY TEXT		PHONE				
Ang Police Department		415-888-	9999			
AGENCY TYPE		Fax				
Police Agency	•					
TIME ZONE		INCIDENT RE	PORT HEADER DISPLAY			
(GMT-06:00) Central Time(US and Canada)	•					
Agency Administrators						
ADD USER						
Select User	▼ Add					

The **Agency Information** tab is the first tab (far left) on the *Agency Profile* page. If another tab is in front, click the **Agency Information** tab to bring it to the front. "Agency Information Tab" below for more information.

Agency Information Tab

The Agency Profile has five tabs, defaulting to the Agency Information tab.

gencies / Agency Profile					
			Go Back	Update Ma	anage Agency Credent
Agency Information - Ang Police Department Sul	Agency Agen	cy Organization	Number Generation	Quick Links	Agency Settings
Agency Information					
AGENCY INTERNAL CODE		ORI NUMBE	R		
ANGPD					
AGENCY DISPLAY CODE		WEBSITE			
ANGPD					
AGENCY CODE DISPLAY TEXT		PHONE			
Ang Police Department		415-888-	9999		
AGENCY TYPE		Fax			
Police Agency	Ŧ				
TIME ZONE		INCIDENT RE	PORT HEADER DISPLAY		
(GMT-06:00) Central Time(US and Canada)	•				
-					
Agency Administrators Add User					
Select User	▼ Add				

The Agency Information tab has twelve sections, depending on your permissions:

Agency Information

This section is used to record and maintain identification and other information data specific to the agency. The data recorded here is printed under the badge/logo on the incident reports.

Agency Administrators

This section is comprised of a grid or table listing all agency administrators. When

agency administrators are listed, click in the **Actions** column to open the *Manage User* page for the agency administrator listed in that row. The *Manage User* page allows you to enter/edit profile information, security settings, preferences, subscriptions, and employee information for the selected user. ("Manage Users" on page 93 for more information.)

To add an agency administrator, select a user from the drop-down box and click **Add**.

Agency User Subscriptions

Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of user subscriptions. Caliber Admins enter user subscription limits when a new agency is added to Online RMS, and subscription limits are updated when your agency purchases additional user subscriptions.

This section is read-only to agencies. The *Manage Subscription Counts* link is accessible to Caliber Admin staff only.

Agency User Subscriptions O Manage Subscription Counts						
Subscription Type	Allocated	Actual	Difference			
Full Time	10	0	10			
Part Time	10	0	10			
Reserve	10	0	10			
Full Time Non-Sworn	10	0	10			
Part Time Non-Sworn	10	0	10			
View Only	10	0	10			
TOTAL	60	0	60			

Note: If your agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional subscriptions, or deactivate an existing user account. For more information on **User Sub-scriptions**, refer to "Agency Information Tab" on the previous page.

You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

Features

The section enables Online RMS personnel to enable the features.

Search Interfaces

This section allows the agency to select interfaces to use. The <u>Setup User Search</u> <u>Interface Access</u> link opens the <u>Setup User Search Interfaces</u> page where you can select screens from the drop-down selection list (or leave the default values as is) and select available search interfaces from the drop-down selection list.

Search Interfaces
SELECT SEARCH INTERFACES
× InterAct (Tab) × LEAP Quick Search (Tab) × Jail Tracker: Person In Jail (Tab)
Setup User Search Interface Access

Attachment Interfaces

Jail Tracker - Facilities to Search

State Submissions Configuration

Miscellaneous

This section is used to set up LEA Security Level and LEA CASE Update Days and other miscellaneous information. It is also used to select NIBR City Indicators from the **Available** box and moved them to the **Selected** box. An administrator with the appropriate permissions can use the arrows to move available features

NIBR City Indicator

Address Information

This section is used to edit/maintain agency address information and set the Geo Code (latitude and longitude values) for the agency address.

Agency Logo

This section is used to upload and display an image of the agency logo. This logo appears on printed incident reports.

Enter the necessary data into this tab, then click the **Update** button.

If needed, click the **Manage Agency Credentials** button to add or update *Credentials*, the user name and password for a NIBRS Portal as an example.

Sub Agency Tab

A sub agency is one for which the primary agency dispatches in response to calls for service. The **Sub Agency** tab is used to add sub agencies and to delete them.

Use the following procedure to add a sub agency.

- 1. Access the Agency Profile page for the primary agency.
- 2. Click the Sub Agency tab, the second from the left tab.

Agencies / Sub Agencies						
						Go Back
Agency Information - Ang Police Department	Sub Agency	Agency Organization	Number Generation	Quick Links	Agency Settings	
					🔂 Ac	ld Sub Agency
Show 10 ¢ entries				Sea	rch:	
Sub Agency	11 Sub Age	ncy Type		ti Ac	tions	
		No data available in	n table			
Showing 0 to 0 of 0 entries					Previ	ous Next

3. Click the Add Sub Agency link to open the Add Sub Agency window.

Add Sub Agency	
SUB AGENCY	
ANGTESTAGENCY	~
Түре	
- Select -	~
	Cancel Save

- 4. Click I to the right of the **Sub Agency** field and select an agency.
- 5. Click I to the right of the **Type** field and select an agency type.
- 6. Click **Save** to close the window and return to the **Sub Agency** tab of the *Agency Profile* page with the new sub agency listed.

Agency Organization Tab

Agency Organization is the third tab from the left on the *Agency Profile* page. If another tab is in front, click the **Agency Organization** tab to bring the *Agency Organization Entry* page to the front as shown in the following example.

					Go Back Upd			
Agency Information - Ang Police	Department Sub Agency	Agency Organization	Number Generation	Quick Links	Agency Settings			
Current Org Settings		Edi	t Org Settings					
LEVEL	R оот	Lev	EL	F T	Соот			
ID	Users / Assignments	ID	Select-		USERS / ASSIGNMENTS			
PARENT Indiana State Police	Is Geographic	Pai	RENT					
RESTRICT SELF ASSIGNMENT	Access Restricted	Res	ndiana State Police	Δ	CCESS RESTRICTED			
RESTRICT CASE SHARING		RESTRICT CASE SHARING						
			Default					
	unique display header that i of this organization's paren ganization units.			-				
Current Display Header (This Org Unit)			Active Display Header (This Org Unit Or a Parent) Ang Police Department					
EDIT DISPLAY HEADER								
Ang Police Department								
Route Settings								
Edit Route Settings								
		Go Back Upd	ate					

This tab is used for statewide configurations. To share data with agencies outside of your State, contact Caliber Support to configure this ability. The parent agency is made a root agency then the regions or districts are configured as child agencies. This function is configured by Caliber Admins only. Then the Header can be configured to show the agency's name.

Note: To share data with agencies outside of your State, contact *Caliber Support* to configure this ability.

The top panel is used to set and maintain organization settings.

Current Org Settings: Display the current settings.

Edit Org Settings: Provide fields and boxes to use for editing organization settings.

The bottom panel is used to specify a unique display header.

Display Header – This field is used to specify a unique display header that may appear on reports and screens for this organization unit.

Current Display Header (This Org Unit)

Edit Display Header: Use this text field to edit the display header.

Active Display Header (This Org Unit Or a Parent)

Route Settings:

<u>Edit Route Settings</u> link opens the *Agency Route Settings* page where you can select the appropriate value for **Case Management Review**, **Field Arrest Submit**, **Impound Submit**, and **Pending Approval**.

CASE MANAGEMENT REVIEW	Go Back Save
User Agency	~
FIELD ARREST SUBMIT	
User Agency	~
IMPOUND SUBMIT	
User Agency	~
PENDING APPROVAL	
User Agency	~

Click **Save** to save new settings; click **Go Back** to return to the *Agency Organization Entry* page.

Number Generation Tab

The **Number Generation**tab is the fourth tab on the *Agency Profile* page. The **Number Generation** tab is used to set up and format automatic number generation for system forms and reports.

Add Number Generation

Beginning with Online RMS 11.3.2, agencies can create *Community Reporting* public forms using the *Qustom Forms* module, making the forms available to the public via the agency's website. Publicly available custom forms require an active **Number Generation** format.

For more information about *Community Reporting* public forms, refer to "Community Reporting with Custom Forms" on page 272.

Use the following procedure to add a number generation for a type of form/report.

1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.

- 2. Click [edit] in the same row as an agency listing to open the *Agency Profile* page for that agency.
- 3. On the Agency Profile page, click the **Number Generation** tab to bring it to the front as shown.

Agency Information - Olive Branch Poli	ce Department	Sub Agency	Agency Organization	Number Generation	Quick Links	Agency Settings		
Indicates # is currently in use	Hide Expired						OA	dd Number Gener
Гуре	Format		Next Number	Placeholder	Effective	Date	End Date	Actions
Dispatch #	YYYY0000000	00	1		1/1/11 1	2:00:00 AM		21
Dispatch #	YYYY0000000	0	1	-	1/1/11 1	2:00:00 AM		
Evidence Audit Report #	YYYYIR000		1	•	1/1/11 1	2:00:00 AM		1
Evidence Audit Report #	YYYYIR000		1	-	1/1/11 1	2:00:00 AM		2
ncident	YYYY0000000	0	1	-	1/1/11	2:00:00 AM		21
ncident	YYYY0000000	0	1	•	1/1/11	2:00:00 AM		21
EA Case Number	0000YY		1	-	1/1/11	2:00:00 AM		
Officer Daily Log #	YYMMIR0000	1	1	-	1/1/11 1	2:00:00 AM		12

4. Click the Add Number Generation link on the top right, immediately under the tab headers to open the Number Generation form.

Number Generation		
ТУРЕ		FORMAT
Warrant	~	000YYYYMM 🗸
PLACE HOLDER		NEXT NUMBER
		1
EFFECTIVE DATE		END DATE
04/01/2019	曲	#
		Close Save

5. In the selection field under the **Type** column, click and select a type (for example, Dispatch, Incident, or Officer Daily Log #) from the list.

Note: If using the *Oreate Incident* option from publicly available custom forms, select *Incident* as the **Type**.

6. In the select format field under the **Format** column, click \checkmark and select a format from the list.

Zeros represent the number of digits in each Next Number; the IR Value is whatever value you choose (one or more letters, numbers, symbols, and so forth – or nothing at all); YY indicates a two digit representation of the year; YYYY represents a four digit representation of the year; and MM represents a two digit representation of the month.

- **Note:** If using the *Create Incident* option from publicly available custom forms and users manually enter the Incident Number from Caliber CAD, select a **Format** that matches the **Tracking Number** format configured in Caliber CAD.
- 7. Enter the Place Holder.
 - **Note:** If using the *Create Incident* option from publicly available custom forms, enter a **Place Holder** such as **CR**. This placeholder value replaces the **IR** value in the selected format.
- 8. In the **Next Number** field, type the beginning number for this series of numbers (e.g. 1).
 - **Note:** If using the Create Incident option from publicly available custom forms and users manually enter the Incident Number from Caliber CAD, enter **0** (zero) as the **Next Number**.
- 9. In the **Effective Date** field, use the calendar tool to specify a beginning date.
- **10.** Optionally, use the calendar tool to specify an **End Date**.
- 11. Click **Save** to add this generation of numbers.
 - **Note**: You cannot create a number generation when a valid, unexpired already exists. You can edit an existing entry to add an expiration date, then create a new one to pick up where the last one left off.

Edit Number Generation

Use the following procedure to edit a number generation.

- 1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.
- 2. Click [edit] on the same row as an agency listing to open the Agency Profile page for that agency.
- 3. On the Agency Profile page, click the **Number Generation** tab to bring it to the front as shown.

								Go Ba
Agency Information - Olive Branch Police D	epartment Sub Ag	ency Age	ency Organization	Number Generation	Quick Links	Agency Settings		
Indicates # is currently in use	Hide Expired						O A	dd Number Generatio
Туре	Format	Next N	lumber	Placeholder	Effective	e Date	End Date	Actions
Dispatch #	YYYY00000000	1		-	1/1/11 1	12:00:00 AM		2
Dispatch #	YYYY00000000	1		-	1/1/11 1	12:00:00 AM		6
Evidence Audit Report #	YYYYIR000	1		-	1/1/11 1	2:00:00 AM		6
Evidence Audit Report #	YYYYIR000	1		-	1/1/11 1	12:00:00 AM		6
Incident	YYYY00000000	1		-	1/1/11 1	2:00:00 AM		2
Incident	YYYY00000000	1		-	1/1/11 1	12:00:00 AM		2
LEA Case Number	0000YY	1		-	1/1/11 1	2:00:00 AM		6
Officer Daily Log #	YYMMIR0000	1		-	1/1/11 1	2:00:00 AM		1

- 4. Locate the listing of the number generation that you want to edit in the **Number Generation** grid.
- 5. Click in the Actions column to the far left in the same row as the listing to pull the details of that record into the fields at the bottom of the page as shown.

Number Generation		
Түре		FORMAT
Warrant	~	000YYYYMM 🗸
PLACE HOLDER		NEXT NUMBER
•		1
EFFECTIVE DATE		END DATE
04/01/2019	#	#
		Close Save

- 6. Make changes as needed. (Use the drop-down selection lists and calendar icons where available to ensure consistency and accuracy.)
- 7. Click Save to save the changes and refresh the display with the new values.

Delete Number Generation

Use the following procedure to delete a number generation record.

- 1. On the Administrative Home page, click the Agencies icon to display the Manage Agencies page.
- 2. Click [edit] the same row as an agency listing to open the Agency Profile page for that agency.

- 3. On the Agency Profile page, click the **Number Generation** tab to bring it to the front as shown.
- Locate the listing of the number generation that you want to delete in the Number Generation grid.
- 5. Click to the far left in the same row to display the prompt, Are you sure?
- 6. Click Yes to confirm deletion and close the window.

The listing no longer appears in the Number Generation grid.

Quick Links Tab

Access the *Agency Profile* page for any agency from the *Manage Agency* page. The Quick Links tab is the fourth (from the left) on the *Agency Profile* page. If another tab is in front, click the **Quick Links** tab to bring it to the front as shown in the following example.

					G	io Bac
Agency Information - Ang Police Department	Sub Agency	Agency Organization	Number Generation	Quick Links	Agency Settings	
County Internal Links						
Quick Link		Category		Agency		
Address		Default Links				
INVENTORY		RMS				
View CAD Calls		RMS				
Agency Internal Links					Add Agency Internal Qu	ick lir
County External Links						
Quick Link			Agency			
State Statutes						
Agency External Links					Add Agency External Qu	ick lir
		Go Back Upd	ate			

- "Edit Quick Link" below for instruction on editing an existing quick link.
- "Add Quick Link" on the next page for instruction on creating a new quick link.

Edit Quick Link

On the Agency Quick Links page, use the following procedure to edit an agency quick link.

1. From the Agency Internal Quick Links grid or the Agency External Quick Links grid, click in the Action column in the same row as the link to be edited.

The Edit Agency Internal Quick Link or the Edit Agency External Quick Link window displays.

- 2. Make changes to the field content as needed.
- 3. Click **Update** to save the changes, close the window, and return to the *Agency Quick Links* page.

Add Quick Link

Use the following procedure to add a quick link.

- 1. Determine if you want to add an internal quick link or an external quick link.
 - Click <u>Add Agency Internal Quick Link</u> to open the *Add Agency Internal Quick Link* window.

Internal Quick Link	
QUICK LINK NAME	
LINK	
Select Link	~
CATEGORY	
Default Links	~
AGENCY	
State of Mark	
	Cancel Save

• Click the <u>Add Agency External Quick Link</u> to open the *Add Agency External Quick Link* window.

External Quick Link	
LINK NAME	
URL	
AGENCY	
State of Mark	
	Cancel Save

- 2. Complete all the fields on the window.
- 3. Click Save.

Agency Settings

Agency Settings is the fifth (from the left) tab on the *Agency Profile* page. If another tab is in front, click the **Agency Settings** tab to bring it to the front as shown in the following example. Refer to "Agency Profile" on page 17 for instructions on accessing the *Agency Profile*.

gency Information - Indiana State Police	Sub Agency	Agency Organization	Number Generation	Quick Links	Agency Settings	
Select one of the links below:						
ssignment Setup		Activity Tables		Ot	her Tables	
Assignment Shift Codes	0	Activity Codes		0 0	C Evidence / Held Property Locations	
Assignment Codes	8	Activity Template		0 0	K Evidence / Held Property Destinations	5
🚔 Agency Vehicles	4	Contract Categories		0		
🎭 Agency Equipment	2					
					1udges	
alls For Service Tables		County & Township Ta	bles	1	—	
and for berrice lables		county of rounding ru	Sics		Offense Codes	
🛱 Disposition Codes	45	🏦 County Codes		-	Case Officer Groups	
 Call Type Codes 	437	Township Codes		1		
① Call Received Codes	15				Vehicle Location Codes	
					Case Routing	
					Search Options	
					Maint Values	
					Case Supervisors	
				i i		
					2	
					P	
					Configure Criminal Complaint Submission	
					Agency Rich Media Storage Notification User Groups	

This page consists of five panels, each of which contains links to specific areas of the Online RMS application. Assignment Set Up and Activity Tables are used in the Officer Daily Module. Calls for Service Tables are used only in the Calls for Service

module. The **County & Township Tables** and **Other Tables** are self explanatory. Each of these tables is described in a separate topic as listed.

Assignment Setup Panel – "Assignment Set up" below.

Activity Tables Panel – "Activity Tables" on page 38.

Calls for Service Tables Panel – "Calls for Service Tables" on page 44.

County and Township Tables Panel - "County and Township Tables" on page 48.

Other Tables Panel – "Other Tables" on page 51.

Assignment Set up

The **Assignment Setup** panel contains four links to the *Officer Daily Log Administration* page which contain several tabs of information. Each link in the **Assignment Setup** panel display a total record count of information that exists in particular tabs of the *Officer Daily Log Administration* page.

Assig	gnment Setup	
▦	Assignment Shift Codes	2
2	Assignment Codes	2
a a a a a a a a a a a a a a a a a a a	Agency Vehicles	1
56	Agency Equipment	0

: Vehicles Equipment
e agency you are
g the "effective codes"
nistering.

For example, the Assignment Shift Codes in the **Assignment Setup** panel ties to the Shift Codes tab of the *Officer Daily Log Administration* page. If two entries in the Shift Codes tab exist, then the number 2 appears to the right of the Assignment Shift Codes in the **Assignment Setup** panel.

Config	Assignment Codes	Activity Co	des Activity Templates	Time Category Codes	Shift Codes	Vehicles Equipment
Exclu	sive Agency Codes	Effectiv	e Agency Codes			
Show	10 🗢 entries			Two entries	Search	€ Add Shift Coo
Code		11	Description		11 Active	11 Actions
PATRO	L3RD		Patrol Midnight - 8AM Sł	nift	No	2
	LDDAYSHIFT		Patrol 8 AM - 4 PM		No	2 0

Assig	gnment Setup	
曲	Assignment Shift Codes	→2
٤	Assignment Codes	2
Ť	Agency Vehicles	1
56	Agency Equipment	0

Assignment Shift Codes

Click the <u>Assignment Shift Codes link</u> link to open the Officer Daily Log Administration page, then click on the **Shift Codes** tab.

							_		
Config	Assignment Codes	Activity Co	odes	Activity Templates	Time Category Codes	Shift C	odes	Vehicles	Equipment
Exclu	sive Agency Codes	Effectiv	ve Agen	ncy Codes					
								•	Add Shift Cod
show	10 🗢 entries					:	Search:		
Code	10 🗢 entries	†↓	Descrip	ption			Search:	11 4	Actions
				ption Midnight - 8AM 1	Shift			1	Actions

• Click in the Actions column to open the Edit Shift Codewindow.

Edit Shift Code		
CODE		
PATROL3RD		
DESCRIPTION		
Patrol Midnight - 8AM Shift		
ACTIVE		
\checkmark		
	Close	Save

- Change field content as needed.
- Check the Active box to activate/deactivate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Assignment Shift Codes page, if not, No displays.)
- Click Save to update the assignment shift code and close the window; click Close to cancel changes and close the window.
- Click 💼 in the Actions column to delete the record listed in the same line.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

• Click the <u>Add Shift Code</u> button to open the *Add Assignment Shift Code* window to add an assignment shift code.

New Shift Code		
CODE		
DESCRIPTION		
Active		
	CI	ose Save

- Complete the Code and Description fields. Shift Code must be UPPERCASE.
- Check the Active box to activate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Assignment Shift Codes page, if not, No displays.)

- Click Save to add the assignment shift code and close the window; click Close to cancel and close the window.
- Click **Go Back** to close the Assignment Shift Codes page and return to the Agency Settings page.

Assignment Codes

Click the <u>Assignment Codes</u> link to open the *Officer Daily Log Administration* page, then click on the **Assignment Codes** tab.

	ration						Go
ate of Mark Configuration							
Config Assignment Code	s Activity Codes	Activity Templa	ates Time C	Category Codes	Shift Codes	Vehicles	Equipment
Exclusive Agency Codes	Effective Agency Cod	ies					
						Add a	Assignment Code
						- Undu /	Assignment Code
Show 10 + entries					Sear		Assignment Code
Show 10 + entries	Description 1	Category î↓	Module 1↓	Minimum Sta			Actions
	Description 14 Foot Patrol	Category	Module 🕮	Minimum Sta No	ffing î∔	ch:	
Assignment Code 1			Module 14		ffing 1∔	ch: Active 14	Actions

• Click in the Actions column to open the Edit Assignment Code window.

CODE FOOT_TRAIN	
DESCRIPTION Foot Patrol ACTIVE MINIMUM STAFFING	
MODULE O OFFICER DAILY LOG O SCHEDULING CATEGORY Training	Close Save

- Change field content as needed.

- Click Save to update the assignment shift code and close the window; or click
 Close to cancel changes and close the window.
- Click 💼 in the Actions column to delete a record listed.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

 Click the <u>Add Assignment Code</u> button to open the Add Assignment Code window to add an assignment code.

New Assignment Code	
CODE	
MINIMUM STAFFING	
MODULE	
○ Officer Daily Log ○ Scheduling	
CATEGORY	
-Select-	
	Close Save

- Complete the Code. Enter letters and/or numbers. Letters must be in UPPERCASE.
- Add a **Description**
- Check the Active box or leave it blank to make it inactive.
- Optionally click Minimum Staffing.
- Optionally select one Module.
- Optionally select a **Category** from the list.
- Click Save to add the assignment code and close the window; or click Close to cancel and close the window.

• Click **Go Back** to close the Assignment Codes page and return to the Agency Settings page.

Agency Vehicles

Click the <u>Agency Vehicles</u> link to open the Officer Daily Log Administration page, then click on the **Agency Vehicles** tab.

cer Daily Log Administration Go Ba										
ate of Mark Configuration										
Config	Assignmen	t Codes	Activity Codes	Activity Templates	Time Category Cod	des Shift Codes	Vehicles	Equipment		
Agenc	y Vehicles	Effe	ctive Agency Ve	hicles						
								• Add Vehicle		
Show 1	.0 \$ ent	ries				Sea	rch:			
Year 1↓	Make 1↓	Model	11 VIN	1↓ Lice	nse 11 Description	n 1↓	Active 🕮	Actions		
2010			V123456234	337HZK33 2H1	4U Marked Pat	trol Unit - Black	Yes	2		
Showing	1 to 1 of 1	entries					Previ	ous 1 Next		

• Click in the Actions column to open the Update Agency Vehicle window as shown.

Agency Vehicle	
YEAR	VIN
2010	V123456234337HZK33
Маке	MODEL
	
LICENSE	UNIT #
2HT4U	
ACTIVE	
Marked Patrol Unit - Black	
	Close Save

- Change field content as needed.
- Check the Active box to activate the vehicle. (If a vehicle is active, Yes displays in the Active column to the right of that code listing on the Agency Vehicles page, if not, No displays.)
- Click Save to update the vehicle record and close the window; click Close to cancel changes and close the window.

• Click in the Actions column to delete the record listed in the same line.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

Click the Add Vehicle button to open the Add Agency Vehicle window to add a vehicle.

Agency Vehicle	
YEAR	VIN
Маке	MODEL
—	
LICENSE	UNIT #
Active	
\checkmark	
DESCRIPTION	
	Close Save

- Complete fields.
- Click Save to add the vehicle and close the window; click Close to cancel and close the window.
- Click **Go Back** to close the *Agency Vehicles* page and return to the *Agency Settings* page.

Agency Equipment

Click the <u>Agency Equipment</u> link to open the Officer Daily Log Administration page, then click the **Agency Equipment** tab.

cer Daily Log Administration Go I								
tate of Ma	rk Confi <u>c</u>	guration						
Config	Assig	nment Codes	Activity Codes	Activity Templates	Time Category Codes	Shift Codes	Vehicles	Equipment
Agen	cy Equi	pment	Effective Agene	y Equipment				
							•	Add Equipment
Show	10 🕈	entries				Search		
Туре	11	Serial #	11 Make	11 Model	11 Description	11 Active	11 A	ctions
				No data ava	ilable in table			
Showing	g 0 to 0	of 0 entries					Pre	evious Next

- Click I in the Actions column to open the Update Agency Equipment window.
 - Change field content as needed.
 - Check the **Active** box to activate the equipment. (If the equipment is active, Yes displays in the **Active** column to the right of that code listing on the *Agency Equipment* page, if not, *No* displays.)
 - Click Save to update the agency equipment record and close the window; click
 Close to cancel changes and close the window.
- Click 👼 in the Actions column to delete the record listed in the same line.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

Click the <u>Add Equipment</u> button to open the Add Agency Equipment window to add equipment.

Agency Equipm	ent	
Түре		SERIAL NUMBER
-Select-	~	
Маке		MODEL
ACTIVE		
\checkmark		
DESCRIPTION		
		Close

- Complete fields.

- Click Save to add the equipment and close the window; click Close to cancel and close the window.
- Click **Go Back** to close the *Agency Equipment* page and return to the *Agency Settings* page.

Activity Tables

The Activity Tables panel contains three links, each of which is described below.

Activity Codes

Click the <u>Activity Codes</u> link to open the *Officer Daily Log Administration* page, then click on the **Activity Codes** tab.

Activity Templates	Time Category Codes	Shift Coo	les Vehicles	Equipment
	Time Category Codes	Shift Coo	les Vehicles	
odes				Add Activity Code
				Add Activity Codo
				G Add Activity Code
			Search:	
Description		11 Act	tive	11 Actions
Animal Complaint		Yes	;	e
Parking Complaint		Yes	:	2
				Previous 1 Next
	Animal Complaint	Animal Complaint	Animal Complaint Yes	Description 11 Active Animal Complaint Yes

• Click in the Actions column to open the Edit Activity Code window as shown.

Edit Activity Code		
CODE		
ANIMAL		
DESCRIPTION		
Animal Complaint		
ACTIVE		
\checkmark		
	Close	ve

- Change field content as needed.

- Check the Active box to activate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Activity Codes page, if not, No displays.)
- Click Save to update the activity code and close the window; click Close to cancel changes and close the window.
- Click 💼 in the Actions column to delete the record listed in the same line.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

Click the Add Activity Code button to open the New Activity Code window to add an activity code.

New Activity Code	
CODE	
DESCRIPTION	
	Close Save

- Complete the Code and Description fields. The Code must be UPPERCASE.
- Check the Active box to activate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Activity Codes page, if not, No displays.)
- Click Save to add the activity code and close the window; click Close to cancel and close the window.
- Click **Go Back** to return to the Agency Settings page.

Activity Templates

Click the <u>Activity Templates</u> link to open the *Officer Daily Log Administration* page, then click on the **Activity Templates** tab.

Caliber Public Safety

					_		
Config Assignmen	t Codes	Activity Codes	Activity Templates	Time Category Code	s Shift Codes	Vehicles	Equipment
Exclusive Agency	Codes	Effective Age	ency Codes				
						🕀 Add Activ	ity Template
Show 10 🜩 ent	ries				Search		
	1	Description	1	Active 1	Activities	1↓ Act	tions
Activity Code							

• Click I in the **Actions** column to the right of the activity template that requires another activity to open the *Add Activity To Template* window as shown.

Template Activity	
TEMPLATE CODE	
10	
ACTIVITY	
Animal Complaint	~
COUNT	
0	
	Close Save

- − Click ✓ in the Activity Code field to open a selection list of activity codes.
- Select the appropriate activity code.
- Complete the **Count** field. A number goes here is for a template for a recurring activity that occurs at the agency, for example, for downtown building checks, the number could be 5 to indicate that five buildings are checked.
- Click Save to add the activity code and close the window; click the X in the upper right corner of the window to cancel and close the window.
- Click in the Actions column to the right of the template requiring changes to open the *Edit Template* window as shown.

Activity Template	
TEMPLATE CODE	
10 DESCRIPTION	
Downtown Checks	
\checkmark	
I	Close Save

- Change field content as needed.
- Check the Active box to activate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Activity Templates page, if not, No displays.)
- Click Save to add the activity code and close the window; click the X in the upper right corner of the window to cancel and close the window.
- Click in the **Actions** column to delete the template listed in the same line. A system message, *Activity Template Deleted Successfully*, confirms the deletion of the template.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

 Click the Add Template button to open the Add Template window to add an activity template.

Activity Template			
TEMPLATE CODE			
DESCRIPTION			
ACTIVE			
		Close	Save
		Close	Save

 Complete the Template Code and Description fields. The Template Code must be in UPPERCASE.

- Check the Active box to activate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Activity Templates page, if not, No displays.)
- Click Save to add the template code and close the window; click Close to cancel and close the window.
- Click **Go Back** to return to the Agency Settings page.

Time Categories

Click the <u>Time Categories</u> link to open the *Officer Daily Log Administration* page, then click on the **Time Category Codes** tab.

ate of Ma	rk Configuration						
Config	Assignment Codes	Activity Codes	Activity Templates	Time Category	y Codes Shif	ft Codes Veh	icles Equipment
Exclu	sive Agency Codes	Effective Age	ency Codes				
Show	10 🗢 entries					• Add Ti Search:	me Category Code
Code	1↓	Description		1↓ 🗛	ctive		Actions
Code GAS	ţ1.	Description Gas Vehicle		11 Ad		1.	Actions

• Click in the **Actions** column to the right of the time category code that you want to change to open the *Edit Time Category Code* window as shown.

Edit Time Category Code			
CODE			
GAS DESCRIPTION			
Gas Vehicle			
		Close	Save

- Change field content as needed.

- Check the Active box to activate the code. (If a code is active, Yes displays in the Active column to the right of that code listing on the *Time Category Codes* page, if not, *No* displays.)
- Click Save to update the time category code and close the window; click Close to cancel changes and close the window.
- Click in the **Actions** column to delete the time code listed in the same line. A system message, *Time Category Code Deleted Successfully*, confirms the deletion of the template.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

 Click the Add Time Category link to open the New Time Category Code window to add a time category code.

New Time Category Code		
CODE DESCRIPTION ACTIVE		
	Close	Save

- Complete the Code and Description fields. The Code must be UPPERCASE.
- Check the Active box to activate the time category code. (If a code is active, Yes displays in the Active column to the right of that code listing on the Time Category Codes page, if not, No displays.)
- Click Save to add the time category code and close the window; click Close to cancel and close the window.
- Click **Go Back** to return to the Agency Settings page.

Calls for Service Tables

The **Calls for Service Tables** panel contains three links, each of which is described below.

Disposition Codes

The <u>Disposition Codes</u> link opens the Call Disposition Codes page.

			Go Back Add Disposition Code
Show 10 + entries			Search:
Disposition Code	Description 1	Event Type	11 Actions
4	Noise	Police	2
10	Animal Abuse	Police	d
Showing 1 to 2 of 2 entries			Previous 1 Next
	Go Back		_

• Click in the Actions column to open the Edit Call Disposition Code window as shown.

Edit Disposition Code
DISPOSITION CODE
DESCRIPTION
Noise EVENT TYPE
Police
Close Save

- Change field content as needed.
- Click Save to update the call disposition code and close the window; click Close to cancel changes and close the window.
- Click 🔳 in the Actions column to delete the record listed in the same line.

Note: A record that has been used cannot be deleted. It can only be edited or made inactive.

 Click the Add Disposition Code button to open the Add Call Disposition Code window to add a call disposition code.

Add Disposition Code	
DISPOSITION CODE	
1	
DESCRIPTION	
EVENT TYPE	
-Select-	~
	Close Save

- Complete the **Disposition Code** and **Description** fields.
- Select an Event Type from the drop-down list.
- Click Save to add the call disposition code and close the window; click Close to cancel and close the window.
- Click Go Back to close the Activity Codes page and return to the Agency Settings page.

Call Type Codes

The <u>Call Type Codes</u> link opens the Call Type Codespage.

								Go Back	< 🗘	Add Call Type Code
Show 10 🜩 entrie	s							Search:		
Call Type Code	†↓	Description	11	Dispatch Event	11	Default Priority	î↓	Active	î1	Actions
15		Trespassing		Police		Low		true		2
Showing 1 to 1 of 1 er	tries								Previ	ous 1 Next
				Go Back						

• Click in the Actions column to open the Edit Call Type Code window as shown.

Edit Call Type Code	
CALL TYPE CODE	
15	
DESCRIPTION	
Trespassing	
EVENT TYPE	
Police	
DEFAULT PRIORITY	
Low	~
ACTIVE	
\checkmark	
Close	Save

- Change field content as needed.
- Check the Active box to activate the code. (If a code is active, *true* displays in the Active column to the right of that code listing on the Call Type Codes page, if not, *false* displays.)
- Click Save to update the call type code and close the window; click Close to cancel changes and close the window.
- Click in the **Actions** column to delete the record listed in the same line. A system message, *Call Type Code Deleted Successfully*, confirms the deletion of the code.
- Click the Add Call Type Code link to open the Add Call Type Code window to add a call type code.

Add Call Type Code	
CALL TYPE CODE DESCRIPTION EVENT TYPE -Select- DEFAULT PRIORITY	×
Low Active	~
	Close Save

- Complete the **Call Type Code** and **Description** fields.

- Select the appropriate **Event Type** from the drop down list.
- Select the appropriate **Default Priority** from the drop down list.
- Check the **Active** box to activate the code. (If a code is active, *true* displays in the **Active** column on the *Call Type Codes* page, if not, *false* displays.)
- Click Save to add the call type code and close the window; click Close to cancel and close the window.
- Click Go Back to close the Call Type Codes page and return to the Agency Settings page.

Call Received Codes

The <u>Call Received Codes</u> link opens the Call Received Codes page.

			Go Back Add Received Code
Show 10 + entries			Search:
Call Received Code	t↓	Description	11 Actions
Emergency Call		9-1-1	ď
InPerson		Walk-in	e
Showing 1 to 2 of 2 entries			Previous 1 Next
	Go Bac	k	

• Click in the Actions column to open the Edit Call Received Code window as shown.

Edit Call Received Code	
CALL RECEIVED CODE	
Emergency Call	
DESCRIPTION	
9-1-1	×
-	
	Close Save

- Change field content as needed.
- Click Save to update the call disposition code and close the window; click Close to cancel changes and close the window.

- Click in the Actions column to delete the record listed in the same line. A system message, Call Received Code Removed Successfully, confirms the deletion of the code.
- Click the Add Call Received Code link to open the Add Call Received Code window to add a call received code.

CALL RECEIVED CODE
Close Save

- Complete the Received Code and Description fields.
- Click Save to add the call received code and close the window; click Close to cancel and close the window.
- Click Go Back to close the Call Received Codes page and return to the Agency Settings page.

County and Township Tables

This panel contains two links, each of which is described below.

County Codes

The County Codes link opens the County Codes page.

				Go Back Add County Code	
Show 10 + entries Search:					
Code 1	Description 11	Notes 11	Agency 11	Actions 11	
ISPBENTON	Benton County	Benton County, IN	State of Mark	e	
ISPBOONE	Boone County	Boone County, IN	State of Mark	e	
Showing 1 to 2 of 2 en	tries			Previous 1 Next	

• Click in the Actions column to open the Edit County Code window as shown.

Edit County Code
Agency
State of Mark
County Code
ISPBENTON
County Name
Benton County
Notes
Benton County, IN
Cancel Save

- Change field content as needed.
- Click Save to update the county code and close the window; click Cancel to cancel changes and close the window.
- Click in the Actions column to delete the record listed in the same line. The system message, "County Code Removed Successfully," confirms deletion of the record.
- Click the <u>Add County Code</u> button to open the **Add County Code** window to add a county code.

Add County Code	
SELECT EXISTING COUNTY	
-Select-	~
COUNTY CODE	
COUNTY NAME	
NOTES	
	Cancel Save

- Select Existing County from the drop-down selection list.
- Complete the County Code and County Name fields
- Enter notes in the **Notes** field, if needed.

- Click Save to add the county code and close the window; click Cancel to cancel and close the window.
- Click Go Back to close the County Codespage and return to the Agency Settingspage.

Township Codes

The Township Codes link opens the Township Codes page.

				Go Back Ac	ld Township Code	
Show 10 ¢ entries Search:						
Code 1↓	Description 14	Notes 14	County Code 🛛 🕮	County Desc 🛛 🕄	Actions 1	
ISPBENTON	Benton Township	Benton Township, IN	ISPBENTON	Benton County	2	
ISPBOONE	Boone	Boone Township, IN	ISPBOONE	Boone County	2	
Showing 1 to 2 of 2 entries Previous 1 Next						

• Click in the Actions column to open the Edit Township Code window as shown.

Edit Township
COUNTY
Benton County
TOWNSHIP CODE
ISPALLEN
TOWNSHIP NAME
Allen Township
NOTES
Benton Township, IN
Cancel Save

- Change field content as needed.
- Click Save to update the township code and close the window; click Cancel to cancel changes and close the window.
- Click in the Actions column to delete the record listed in the same line. The system message, "Township Code Removed Successfully," confirms deletion of the record.

 Click the <u>Add Township Code</u> button to open the **Add Township Code** window to add a township code.

Add Township	
COUNTY CODE	
-Select-	~
SELECT EXISTING TOWNSHIP	
-Select-	~
TOWNSHIP CODE	
TOWNSHIP NAME	
NOTES	
	Cancel

- Select County Code from the drop-down selection list.
- Select Existing Township from the drop-down selection list.

Or enter new

- Township Code and Township Name fields.
- Enter notes in the **Notes** field, if needed.
- Click Save to add the township code and close the window; click Cancel to cancel and close the window.
- Click Go Back to close the Township Codes page and return to the Agency Settings page.

Other Tables

The **Other Tables** panel on the **Agency Settings** tab contains several links, as described below.

Evidence / Held Property Locations

The Evidence / Held Property Locations link opens the Evidence - Held Property Locations page.

Code 1	Description	Property 11	Locker 11	Officer 11	Active 11	Actions
		Туре		Access		
N/A	N/A		Ν	γ	Y	2
O_IMPOUND	Impound		N	γ	Y	2
O_LARGE	Large Item Storage		N	γ	Y	2
O_OTHER	Other		N	γ	Y	2
TRANS_UNKNWN	Transported - Unknown Location		Y	Y	γ	6

If needed, type a search value in the **Search** field and click **Search** to redisplay the *Evid*ence - Held Property Locations page that match your search criteria.

• When you have located the listing of the record requiring editing, click in the **Actions** column to the far right of the listing to open the *Edit Evidence - Held Property Location* page.

Code O_LARGE DESCRIPTION	Go Back AGENCY Indiana State Police
Large Item Storage	a
	Officer Access
Active	PROPERTY TYPE Evidence Sack Save

- Change field content as needed.
- If needed, check the Locker box to indicate that the evidence location is a locker or click to remove the check if the location is not a locker. (If Locker is checked, Y displays under the Locker column for the location on the Evidence / Held Property Locations page.)
- Uncheck the Officer Access box to prevent access.
- Select Active or Inactive from the Status field drop-down selection list to indicate whether or not the location is active. (If the location status is active, Ydisplays in the Active column on the *Evidence Locations* page, if not, *N* displays.)
- Click Save to save changes to the record and return to the Evidence / Held Property Locations page.

- Click in the Actions column to delete the record listed in the same line. The message, "Are you sure you want to delete this Property Location?" displays. Click **Yes** to confirm deletion or click **No** to keep the record.
- Click the Add Evidence/Held Property Locations button to open the Add Evidence -Held Property Location window to add another location record.

		Go Back
Code	Agency	
	Indiana State Police	
DESCRIPTION		
LOCKER	OFFICER ACCESS	
STATUS	PROPERTY TYPE	
Active	✓ -Select-	~
	Cancel Save	

- Complete the fields appropriately.
- Click Save to return to the Evidence Locations page where the new evidence location is now listed.
- Click the **Print Location Barcodes** button to print location barcode labels.

Location Barcodes Print Options						
Please select what information you would like to Print. Search:						
	Code 1	Description 11	Property Type 🕮	Locker 11	Officer Access 11	
	N/A	N/A	Evidence	N	γ	
	O_IMPOUND	Impound	Evidence	N	Y	
	O_LARGE	Large Item Storage	Evidence	N	Y	
	O_OTHER	Other	Evidence	N	Y	
	TRANS_UNKNWN	Transported - Unknown Location		Υ	Y	
Print Individual Barcode Labels (Otherwise Group on Same Page)						
					Cancel	

- Select the items for which you want to print barcodes. Prints on letter sized paper, 20 labels per page.
- Check the Print Individual Barcode Labels box if you wish to print one barcode label per page.
- Click Print.

Evidence / Held Property Destinations

The <u>Evidence / Held Property Destinations</u> link opens the *Evidence - Held Property Destinations* page.

DESTINATION CODE		DESCRIPTION			Go Back Save
Show 50 ¢ entries					Search:
Code ti	Description		11	Active	11 Actions 11
ATTR	Defense Attorney			Υ	
CRT	Court			Υ	6
LIMS_M	Mailed to LIMS			Υ	2
OFF	Officer			Υ	6
PROS	Prosecutor			Y	2
T_LIMS	Submitted to LIMS			Υ	6
TOOFF	TO Officer			Y	2
Showing 1 to 7 of 7 entries					Previous 1 Next
		Ge	Back		

• Click in the Actions column of the record you want to update. Three fields at the top of the page populate with the record you are updating. Use these fields to edit the record as follows:

DESTINATION CODE		DESCRIPTION Court		Active	Go Back Update
Show 50 ¢ entries				•	Search:
Code ti	Description		11 🗛	ctive	11 Actions 11
ATTR	Defense Attorney		Y		
CRT	Court		Y		
LIMS_M	Mailed to LIMS		Y		2
OFF	Officer		Y		2
PROS	Prosecutor		Y		6
T_LIMS	Submitted to LIMS		Y		2
TOOFF	TO Officer		Y		e 1
Showing 1 to 7 of 7 entries					Previous 1 Next
		Go Back			

- Change the content in the **Destination Code** and the **Description** fields as needed.
- Check the Active box to activate the code. (If a code is active [Active check box checked], Ydisplays in the Active column on the Evidence Held Property Destination page, if not, N displays.)
- Click Update to update the evidence- held property destination record and close the window; click Cancel to cancel changes and close the window.

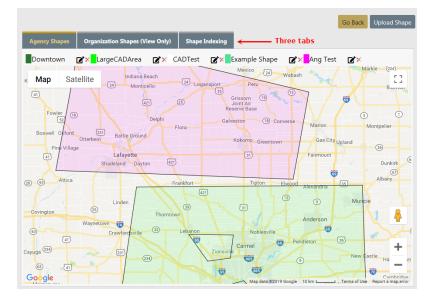
- Click in the Actions column to delete the record listed in the same line. The message, "Are you sure you want to delete?", displays. Click **Yes** to confirm deletion or click **No** to keep the record.
- To add another evidence destination, use the three fields near the bottom of the page as follows:
 - Click in the **Destination Code** field and type in a code for the evidence held property destination.
 - Click in the **Description** field and type in a brief description of the evidence held property destination.
 - Check the Active box to activate the code. (If the Active check box is checked, Y displays in the Active column on the Evidence Held Property Destination page, if not, N displays.)
 - Click Save to save the new destination code or click Go Back to clear the fields and return to the Agency Settings page.

Reporting Areas

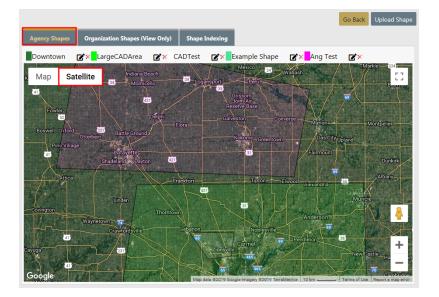
The Reporting Areas link opens the Reporting Areas page.

Show 10 ¢ entries					😰 Show N Searc	Map • Add Reporting Area
Reporting Area	t⊥	Status	11	Agency Name	ti	Actions 1
Downtown-East		Active		State of Mark		•
West-Business		Active		State of Mark		9
Showing 1 to 2 of 2 entries						Previous 1 Next
			Go E	Back		

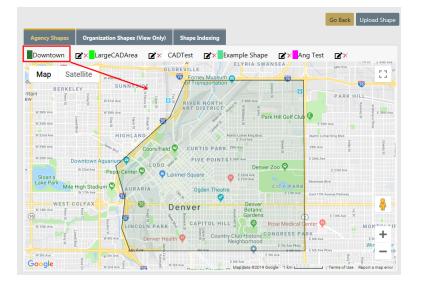
• Click the <u>Show Map</u> link to open the *Mapping Shapes* map as shown in the following example.



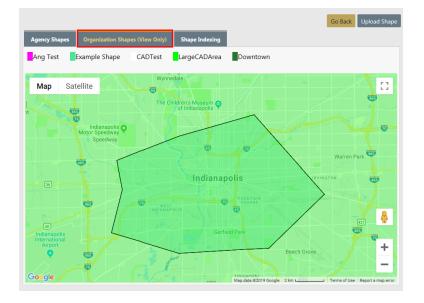
 Click Satellite in the upper left corner to change the display as shown in the following example.



- Click on the different areas to view that area on the map.



 Click on the Organization Shapes (View Only) tab to view for the organization only.



 Click on the Upload Shape button on the upper right of the page to select a file to upload.

FILE		SHAPE NAME
	Browse	
SHAPE TYPE		COLOR
Other	~	
	Go Back	Upload

- Click on the **Shape Indexing** tab to index the shapes.

				Go Back Upload Shape
Agency Shapes	Organization Shapes (View Only)	Shape Indexing		
				Show Totals
Name	Last Index Date	Indexed Total	Actual Total	Actions
Downtown	08/11/2016 1647			•
LargeCADArea	08/11/2016 1704			•
CADTest	08/11/2016 1705			
Example Shape	08/11/2016 1705			•
Ang Test	08/09/2017 1515			

Click on the select icon **b** to index a shape.

- Click **Save Changes** to save your changes and return to the *Reporting Areas* page.
- Click **Go Back** to return to the *Reporting Areas* page.
- If needed, type a search value in the **Search** field and click **Search** to redisplay the *Reporting Areas* page with the search results.
- Click in the Actions column to the far right of the listing to open the View Reporting Areas page.

BEAT	
Test	
SUB BEAT	
Test	
STATUS	
Active	
	Go Back

- This is a view only page.
- Click **Go Back** to close the *View Reporting Areas* page and return to the *Reporting Areas* page.
- Click the <u>Add Reporting Area</u> link to open the *Add Reporting Areas* page to add another reporting area record.

BEAT	
SUB BEAT	
STATUS	
-Select-	~
	Go Back Save

- Complete the fields appropriately.
- Click Save to save the new record and return to the Reporting Areas page where the new reporting area is listed.
- Click **Go Back** to close the Add Reporting Areas window without saving and return to the *Reporting Areas* page.
- On the Reporting Areas page, click Go Back to return to the Agency Settings page.

Towing Companies

<u> </u>	<u>paio</u> op olie			50 p 4 g 6 .		
					Go Back	Add Towing Company
Show 10 \Leftrightarrow entries					Search:	
Name	11 Street	11 Phone	11 Email 1	County	11 Active	11 Actions 11
Aaa Tow	1300 Bush Street	111 333 3333			No	(2)
AAA TOWING	100 Main	111 222 3333		ANG TEST COUNTY	No	Z 💼
ABC 123 Towing	102 Smith Dr.	888 222 2555		Daviess DIST 34	Yes	Z
ACME WRECKER	100 Anywhere	777 777 7777		Ripley County	Yes	Z
Asdfsa	Asdfadf	581 635 1635			Yes	6
Big John's Towing	2358 East St.	456 158 1651		Red	Yes	6
Big Tow	345 Howard Street, Building G	888 777 7777		Elkhart	Yes	Z
Browns	123 Front St	555 555 1234		LaGrange County	Yes	B
Delco Road Towing	123 Delco Road	444 444 4444		Crawford DIST34	Yes	2
DI Towing	1200 Broadway	303 333 2333			Yes	6
Showing 1 to 10 of 23 entries					Previous	1 2 3 Next

The Towing Companies link opens the *Towing Companies* page.

in the **Actions** column to the far right of the listing to open the *Edit Towing* Click Company page.

Towing Company				Go Back
Company Name		Street Name		
Aaa Tow		1300 Bush Street		
Сіту	STATE		Zip	
San Francisco	California	~	94115	
PHONE	COUNTY		EMAIL ADDRESS	
111 - 333 - 3333	-Select-	~		
Active				
	Go Ba	ck Save		

- Change field content as needed.
- Click Save to save changes to the record and return to the Towing Companies page.
- Click in the Actions column to delete the record listed in the same line. The message, "Are you sure?" displays. Click **Yes** to confirm deletion or click **No** to keep the record.
- Click Add Towing Company in the upper right corner to open the Add Towing Company page.
 - Complete the fields appropriately.
 - Click Save to save the new record and return to the *Towing Companies* page where the new towing company is listed.
 - Click Go Back to close the Add Towing Company page without saving and return to the Towing Companies page.
- Click **Go Back** to return to the *Agency Settings* page.

Judges

The <u>Judges</u> link opens the Judges page.

							Go Back € Add Judge
Show 10	entries				Searc	:h:	
No. ↑↓	Last Name 🛛 🕅	First Name 🛛 🕄	Middle Name 🛛 🕄	Title 11	User ID 👔	Active î	Actions
7	Stem	Robert		Judge		Y	2
8	Roe	Jan		Judge		Y	2
9	Webber	Fredrick		Judge		Y	2
10	Zan	Debbie		Judge		Y	2
11	Smith	John		JUDGE		Y	2
12	Smith	John		JUDGE		Y	2
14	Bloom	Judy		JUDGE		Y	2
15	Bloom	Judy		JUDGE		Y	2
16	Jerry	Smith		JUDGE		Y	2
17	Judy	Judge		JUDGE		Y	2
Showing 1	to 10 of 16 entries					Previous 1	2 Next

• Click in the Actions column to the far right of the listing to open the Edit Judges page.

Judge
LAST NAME
Stem
FIRST NAME
Robert
MIDDLE NAME
TITLE
Judge
USER ID
ACTIVE
\checkmark
Close Save

- Change field content as needed.
- Click **Save** to save changes to the record and return to the *Judges* page.
- Click in the **Actions** column to delete the record listed in the same line. The message, "Are you sure?" displays. Click **Yes** to confirm deletion or click **No** to keep the record.
- Click Add Judge in the upper right corner to open the Judges page as shown.

Judge		
LAST NAME		
FIRST NAME		
MIDDLE NAME		
TITLE		
USER ID		
ACTIVE		
	Close Sa	ave

- Complete the fields appropriately.
- Click Save to save the new record and return to the Judges page, or click Close to return to the Judges listing without saving the new record.
- Click **Go Back** to return to the *Agency Settings* page.

Court Locations

The <u>Court Locations</u> link opens the Court Locations page.

					Go	Back 🕈	Add Court Location
Show	Show 50 ¢ entries Search:						
ID †I.	Name î	Address 11	Status 🔃	Court	Receiving 11 Agency	Sort 11 Order	Actions 11
58	Court #1 -	7865 Westbrook Street San Francisco California 94115-	Active	true	true	2	6
72	Court #2 -	65 Eastbrook Street Carpinteria California 93013-	Active	true	false	4	2
88	Court #3 -	1 Main Indianapolis Indiana 12345-	Active	false	false	3	6

• Click in the Actions column to the far right of the listing to open the Edit Court Location page.

Court Location			Go Back
Court Name		Court Name 2	
Court #1			
Address 1		Address 2	
7865 Westbrook Street			
Сіту		STATE	
San Francisco		California	*
Zip		PHONE	
94115 -			
JURISDICTION NAME		JURISDICTION TYPE	
		-Select-	*
Comment			
SORT ORDER			
2			
COURT LOCATION	RECEIVED FROM AGENCY	Active	AFFIDAVIT FOOTER
	s	ave	

- Change field content as needed.
- The **Sort Order** is where this record falls in the Court *List Of Values*. In this example, Court #1 appears as the second option on the list.

Complaint Details
CRIMINAL COMPLAINT NUMBER
20COMP0181
Court
-Select- 🔓 🗸 🗸
-Select-
Judv's Court
Court #1
Court #3
Court #2
A'postrophe's Court
another court
Court Location 1
DL Supreme Court
New Court
test

- Click **Save** to save changes to the record and return to the *Court Locations* page.
- Click in the **Actions** column to delete the record listed in the same line. The message, "Are you sure?" displays. Click **Yes** to confirm deletion or click **No** to keep the record.
- Click Add Court Location in the upper right corner to open the *Court Location* page as shown.

Court Location			Go Back
Court Name		Court Name 2	
1			
Address 1		Address 2	
Сітү		STATE	
		-Select-	~
Zip		PHONE	
-			
JURISDICTION NAME		JURISDICTION TYPE	
		-Select-	~
Comment			
Sort Order			
COURT LOCATION	RECEIVED FROM AGENCY	Астіче	Affidavit Footer
	Sa	ve	

- Complete the fields appropriately.
- The Sort Order is where this record falls in the Court List Of Values.
- Click Save to save the new record and return to the *Court Locations* page, or click
 Go Back to return to the *Court Locations* listing without saving the new record.
- Click Go Back to return to the Agency Settings page.

Offense Codes

The Offense Codes link opens the Local Offense Codes page.

Show 10 \$	entries		Go Back 🕒 Add	d Local Offense Code 📗 🖶 Print
Local ↑ Offense	Description 1	State Offense 👔	NIBRS Code îl	Status Actions 1
0001	Ordinance Violation - Disorderly Conduct			Inactive
1111555	Test			Inactive
12333	Local Offense - Failure to Register			Active
6.2.106.A :M: 1350	Homicide Criminally Negligent Manner	35-42-1-1 M01	09A	Inactive
ANG TEST	Ang Test			Active
IA-32644	Testing			Inactive
REGION 2 LOCAL OFFENSE TEST	Region 2 Local Offense Test			Active
TEST LOCAL OFFENSE	Test Offense Description	10-14-3-29.5	90Z	Active
TESTING123	Testing123	9-21-8-52A	90Z	Inactive
Showing 1 to 9 c	of 9 entries			Previous 1 Next

• Click in the Actions column to the far right of the listing to open the Edit Local Offense Code page.

		Go Back
OFFENSE	REQUIRE APPROVAL	
0001		
AGENCY		
× County of Mark		
DESCRIPTION		
Ordinance Violation - Disorderly Conduct		
STATE OFFENSE		
-Select-		~
NIBRS CODE		
-Select-		~
STATUS		
Active		~
ARREST CODES		
	Go Back Save	

- Ensure that the button to the left of the Require Approval label is checked, if all incident reports with this offense must be approved.
- Change content in all fields as needed.
- Select Active or Inactive from the Status field drop-down selection list to indicate whether or not the offense code is active. (If the offense code status is active, Active displays in the Status column on the Local Offense Codes page, if not, Inactive displays.)
- Click Save to save changes to the record and return to the Local Offense Codes page. Click Go Back to cancel changes and return to the Local Offense Codes page.
- Click in the Actions column to delete the record listed in the same line. The message, "Are you sure you want to delete Offense Code?" displays. Click Yes to confirm deletion or click No to keep the record.
- Click the Add Local Offense Code button to open the Add Local Offense Code page to add another offense code record.

	Go Back
OFFENSE	
DESCRIPTION	
Go Ba	ck Save

- Complete the fields appropriately.
- Click **Save** to save the new record and return to the *Local Offense Codes* page where the new reporting area is listed.
- Click **Go Back** to close the *Add Local Offense Code* page without saving and return to the *Local Offense Codes* page.
- Click Go Back to return to the Agency Settings page.

Case Officer Groups

The Case Officer Groups link opens the Case Officer Groups page.

D35 GROUP		
	Jennifer Hackberry Brian DeNoyer	20
D42 GROUP 12	Jimmy Buffett Peter (off) T Avery Annelyn Aficial Charles Livingwell	2
GROUP 2	Derek J Livangood Dana McMillan Derek J Livangood Dana M	20

• Click in the Actions column to the far right of the listing to edit an existing record.

GROUP NAME D35 GROUP OFFICERS Search Select All Select No Employee Evidence2 #654321 Christian (osuper) Fred Gordmanson #200 Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672 Officer Supsonsen #68249	Officer Group				
OFFICERS Search Select All Select No Employee Evidence2 #654321 Christian (osuper) Fred Gordmanson #200 Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672	GROUP NAME				
Search Select All Select All Employee Evidence2 #654321 Jennifer Hackberry #4 Christian (osuper) Fred Gordmanson #200 Brian DeNoyer #702 Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672	D35 GROUP				
Employee Evidence2 #654321 Christian (osuper) Fred Gordmanson #200 Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672	OFFICERS				
Christian (osuper) Fred Gordmanson #200 Brian DeNoyer #702 Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672	Search			Select All	Select None
Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672	Employee Evidence2 #654321	^	Jennifer Hackberry #4		~
Crispy Pastry #94672	Christian (osuper) Fred Gordmanson #200		Brian DeNoyer #702		
	Christian (osuper) Gordmanson2 #90				
Officer Sunsonsen #68249	Crispy Pastry #94672				
	Officer Sunsonsen #68249				
Really		\sim			\sim
				Canc	el Update

- Click an officer in the left window to move it to the right window. Officers that appear in the right window are included in the group. Click the Select All button to include all officers that appear in the left window. Click the Select None button to remove all officers from the group.
- Click the **Update** button to save your changes.
- Click in the Actions column to delete a record. The message, "Are you sure?" displays. Click Yes to confirm deletion or click No to keep the record.
- Click the CAD Add Officer Group button to add a new Officer Group record.

Officer Group			
GROUP NAME			
OFFICERS			
Search		Select All	Select None
Employee Evidence2 #654321 Christian (osuper) Fred Gordmanson #200 Christian (osuper) Gordmanson2 #90 Crispy Pastry #94672	^		^
Officer Sunsonsen #68249 ReallyReallyReally VeryVeryVeryVeryVery	~		~
		Ca	ancel Save

- Enter a unique **Group Name**. It must be unique within the organization.
- Click an officer in the left window to move it to the right window. Officers that appear in the right window are included in the group. Click the Select All button to include all officers that appear in the left window. Click the Select None button to remove all officers from the group.

The group may contain any officer in the organization. A single group may contain officers from different agencies.

Users with access to the *Agency Settings* tab can see all groups for the entire organization.

- Click the **Save** button.

Screening Questions

Screening Questions are used with the *Field Arrest* module in conjunction with the incarceration progress.

The <u>Screening Questions</u> link opens the *Screening Questions* page that lists the question sets.

				Go Back • Add Question Type
Name	Module	Active	Special Category	Actions
Juvenile Protection:	Field Arrests	No	Juvenile Questions	2
Screening Questions	Field Arrests	No		2
Drugs Screening	Field Arrests	Yes		2
test	Field Arrests	No	Juvenile Questions	2

• Click the <u>Add Question Type</u> link on the top right of the window to open the Screening Questions page to add a question set.

		Go Back
NAME	MODULE	
Juvenile Protection:	Field Arrests	~
ACTIVE	SPECIAL CATEGORY	
	-Select-	~
	Save	
		Add Question
Question	Active	Actions

- Enter a Name for the question set, select values for the Module and Special Category.
- Check the **Active** box to make it active, or leave the box blank to make it inactive.
- Click Save to save the new record, or click Go Back to cancel the entry and return to the previous screen.
- Once you have created a new question set, click the <u>Add Question</u> link on the bottom right of the page to open the <u>Screening Questions</u> page to enter more questions related to the question set.

	Go Back
NAME	YES / NO QUESTION
s	ave

- Enter the question in the **Name** field.

 Check the Yes/No Question box if the question can be answered with a Yes or No, others leave it blank. Click Save to display the answer options.

If a Yes/No Question

ACTIVE			Go Back
\checkmark			
		(Add Answe
	Comment Required	Default	Actions
			Ĩ
		V	Ĩ
			Ē
		Comment Required	Comment Required Default

If not a Yes/No Question

NAME AC Were minors present and was action taken?				Go Back
were minors present and was action taken?			0	Add Answer
Answer		Comment Required	Default	Actions
Yes, minor(s) were released to a responsible family				Ô
Yes, social service responded directly to take charge of th	e m [Ĩ
TEST NEW RESPONSE TO QUESTION	[Ē
Maybe	[Ē
Save				

- Check the Active box to make it active, or leave the box blank to make it inactive.
- Select appropriate values based on the question type.
- Click the <u>Add Answer</u> link on the upper right of the window to add additional answers if needed, click **Save**, then click the **Go Back** button to return to the previous page.

Note: Use the icons in the Actions column to edit or delete questions.

Note: If there are no answers tied to a question, the **Active** checkbox on the Question automatically is unchecked and disabled until at least one answer is added.

Vehicle Location Codes

This link opens the Vehicle Impound Location Codes page as shown.

Show 10 🜩 e	entries		• Add Loo	Go Back cation Code
Code î↓	Description 1	Agency Code 🛛 🕅	Actions	11
CLAB	Crime Lab Garage	IPSC		2
STLOT	Storage Lot	IPSC		2
WRCK	Wrecker Company	IPSC		2
Showing 1 to 3 o	f 3 entries		Previous	1 Next

To add a code, click the Add Location Code link to display the Add Impound Location Code window.

Location Code	
IMPOUND LOCATION CODE	
DESCRIPTION	
	Cancel Save

Type an alphanumeric code in the **Impound Location Code** field, and type a description for the code in the **Description** field. Click **Save** to save the code and return to the *Vehicle Impound Location Code* page with the new code listed.

Add as many location codes as needed. The following page example shows four location codes.

To edit a code, click in the **Actions** column to the far right of the code listing to open the *Edit Vehicle Impound Location Code* window where you can edit the code and/or description then click **Save**.

To delete a code click in the **Actions** column to the far right of the code listing to open the message, *Vehicle Impound Code Deleted Successfully*. Click **Yes** to return to the page where the deleted code is no longer listed.

Narrative Templates

The Narrative Templates link opens the Narrative Templates page.

					Gol	Back Add	l Template
Agency Templa	tes E	ffective Agency Ten	mplates				
Show 10 ¢	entries						
Name	t↓	Description	†↓	Offenses	†↓	Actions	ţ†
			No data available i	n table			
Showing 0 to () of 0 en	tries			I	Previous	Next
<							>

- Click in the Actions column to the far right of a listing to open the Edit Narrative Template page.
 - Change content in all fields as needed.
 - Click Save to save changes to the record and return to the Narrative Templates page. Click Cancel to cancel changes and return to the Narrative Templates page.
- Click in the Actions column to delete the record listed in the same line. The message, *Are you sure you want to delete this template*?displays. Click **Yes** to confirm deletion or click **Cancel** to keep the record.
- Click the <u>Add Template</u> button in the title bar of the grid to open the <u>Add Narrative</u> *Template* page to add another narrative template.

Add Narrative Template	Go Back Save
Template Name	NARRATIVE CATEGORY
	-Select- 🗸
DESCRIPTION	
X 6 @ @ ← → Q \$; ∞ ∞ ⊑ ⊞ ≣	55
B I U II II = :≣ III III Styles - Format	• Size • ▲• ⊨ = I Line Hei •

- Complete the fields at the top of the page appropriately.
- Type the content of the template in the large pane, using the tool bar at the top of the pane to format the text as needed.
- Click **Save** to save the new template as often as needed.
- Click **Go Back** to close the *Add Narrative Template* page and return to the *Narrative Templates* page.
- Click **Go Back** to return to the *Agency Settings* page.

Case Routing

Administrators with appropriate permissions can route cases to external agencies.

The <u>Case Routing</u> link opens the Agency Case Routing page.

Go Back
In addition to agencies within the organization, select the external agencies cases can be routed to
SELECT AGENCIES
× A_standalone Pd
Save

- To *select* an available agency, click in the **Select Agencies** box then select one or more agencies from the list that appears.
 - To *deselect* an agency, click on the X to the left of the agency name to remove it from the **Select Agencies** box.
- Click **Save**. A successful message appears in green when the save is complete.
- Click **Go Back** on the upper right of the page to return to the Agency Settings page.

Search Options

Administrators of a multi-tier organization have the ability with appropriate permissions to set the Online RMS *Default Search Options* to control what agency data is searchable by default. For example, the *Search Option* default could be set to either allow users to search data within their agency, all agencies within an organization., or all agency schemas.

The <u>Search Options</u> link opens the Agency Search Options page.

G

- Click on the **down arrow** then select an option from the list.
- Click **Update** to save the change.
- Click **Go Back** on the upper right of the page to return to the Agency Settings page.

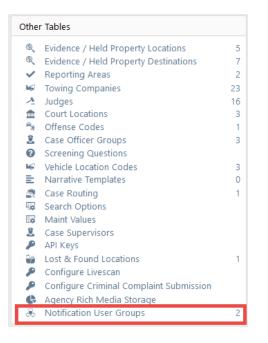
Maint Values

Maintenance Values provides administrators with proper permissions the ability to configure module behavior and restrictions for the agency.

For details, refer to "Maintenance Values" on page 345.

Notification User Groups

Provides the ability to configure user groups at the agency level to allow defined users to filter Notifications on their Home Page by that user group.



User Groups		Go Back Add Group
Show 100 ¢ entries		Search:
Name	1. Users	11 Actions
ISP 1	Sally (osuper) Adams Admin 1 NEW 4 Annelyn Aficial	Ø 🖲
Test Notification Agency Group	Christine Saur Dana M	1
howing 1 to 2 of 2 entries		Previous 1 Next

Click the Add Group button to add a new group.

	Go Back
Group Details	
Group Options	
Name	
Test Group 2	
Users	
SELECTED USERS [Remove AII]	
Officer 1 - Police Agency	^
Officer 2 - Police Agency Admin 1 - Police Agency	
	× .
Save	

- Enter a **Name** for the group.
- Select the **Users** for the group.
- Click Save.

Users identified in the group can then filter Notifications on their Home Page by that group.

Notifications	
-Filter By Users-	~
-Filter By Users-	
Daytime Officers	
Daytime Officers	
Weekend Officers	
ISP 1	
Shift #1 D42	
Test Group 2	
Test Notification Agency Group	

Add Agency

Use the following procedure to add an agency record.

- 1. On the *Administrative Home* page, click the **Agencies** icon to display the *Manage Agencies* page.
- 2. Choose one of the following options to add an agency:
 - a. Click Add Agency link in the upper right corner to display the Agency Profile page.

			Go Back Sa
Agency Information -			
Agency Information			
AGENCY INTERNAL CODE		ORI NUMBER	
AGENCY DISPLAY CODE		WEBSITE	
AGENCY CODE DISPLAY TEXT		PHONE	
AGENCY TYPE		FAX	
-Select-	~		
TIME ZONE		POINT OF CONTACT	
-Select-	~		
External Authentication			
Enabled Type Host	Port	Shared Secret	Enable Level Action
			~
Agency Administrators			
Agency Administrators			

Enter data into the available fields in each section, then click Save.

The form saves and opens in edit mode with six tabs:

- "Agency Information Tab" on page 18 for information on the Agency Information tab.
- "Sub Agency Tab" on page 21 for information on the **Sub Agency** tab.
- "Agency Organization Tab" on page 21 for information on the Agency Organization tab.
- See "Number Generation Tab" on page 23 for information on the **Number Generation** tab.
- See "Quick Links Tab" on page 27 for information on the **Quick Links** tab.
- "Agency Settings" on page 29 for information on the Agency Settings tab.
- b. Or, click the AgencySetup Wizard to guide you through the setup process. You can either manually enter data or upload setup data from an Excel spreadsheet using this method.

TO UPLOAD:

Click **Download Template** to download a formatted Excel spreadsheet.

Enter data into the Agency Setup. x/s Excel spreadsheet and Save.

In Online RMS, click **Choose File** and select the *AgencySetup.xls* Excel spread-sheet.

Click Upload.

TO MANUALLY ENTER DATA:

Click Manually Enter Data to open the Wizard.

Enter data into the first tab then click **Next**. Repeat until all tabs are completed. Click **Finish**.

Chapter 5. Roles

Once a user has been added to an agency, that user can log into the system but has no access to system features until his/her roles have been assigned. Caliber Public Safety develops roles for each type of personnel employed by an agency, and these roles consist of permissions or privileges. Several permissions are used to make up each of the roles used by an agency.

Because system tasks performed by one user (for example, an officer) differ from those performed by another user (for example a patrol supervisor), the two roles also differ. Certain users are given permissions to perform specific tasks within the system by the Officer role while other users are given permissions to perform other tasks by the Patrol Supervisor role.

- A user must be assigned at least one role in order to perform tasks within the system.
- A user can be assigned more than one role.
- Two different roles may include one or more of the same permissions, but within a specific agency, each role is unique in its permissions make-up.
- Certain users may be able to delegate some or all their permissions/privileges to another user for a period of time.

Access Roles Module

System roles used by an agency can be added and edited via the **Role**s module by certain users with administrative permissions.

From the Home page access the Roles module one of two ways:

• Click on the Administration menu option to display a drop-down menu and select the **Roles** option.



• Click on the Administration menu option, then click again on the Administration drop-down option to display the *Administrative Home* page. On the *Administrative Home* page, click the **Roles** icon located under the Security section.

	r 🗸	Administration 🔻 Incide	nts 🔻
😭 Home		Administration	
Broadcast I	Mes	Custom Forms	
		Agencies	
No Messag	les	Broadcast Messages	
		Manage System	
Notification	ns	Permissions	
		Roles	
-Filter By l	Jser	Security Groups	
Count 11	No	Tables	
2	IN	Users	ACTIV
42	DEP	ARTMENT VEHICLE SERVI	CE REQ

System		
G Manage System	Agencies (77)	
Converting		
Security		
Roles (45)	Security Groups (10)	Users (206)

The Roles page displays as shown.

Administratic	n / Roles		
Show 10	entries		Go Back Add Role Compare Search:
Compare ↑↓	Role Name îl	Role Description	Actions 11
	AGENCY_ADMIN	Role for Agency Administrators	
	AGENCY_AD_HOC_REPORTING_TOOL	Agency Ad Hoc Reporting Tool	
	CAL_ADMIN	Schedule Administrator	
	CAL_MANAGER	Calendar Manager	
	CASE_SUPERVISOR	CASE_SUPERVISOR	
	CFS	Dispatch type role for Calls for Service	2 • Z
	CID_SUPERVISOR	Role for assigning general Investigative functions to Investigator Supervisor	
	CID_USER	Role for assigning general Investigative functions to Investigator	
	COMMAND	Command Staff	
	COPY_DL TEST	IA-52785	2 ⊗ 2
Showing 1 to	10 of 45 entries	Previot	us 1 2 3 4 5 Next
		Go Back	

From this page, administrative users with the appropriate roles/permissions can edit existing roles, add new roles, compare roles, and copy roles for the agency.

- "Edit Role" below.
- "Add Role" on page 81

Edit Role

Use the following procedure to edit a role.

- **Note**: Never edit Roles that came with the software; make a copy of the Role then edit the copy as needed. For details on how to copy a Role refer to "Copy Role" on page 83.
- 1. From the *Roles* page, locate the record to be changed as follows:
 - Scroll down the list of roles until you locate the one you want to edit. (Only roles with an edit icon in the Actions column can be edited.)
 - Use the **Search** fields to return the record as shown.

Show 10	• entries		Go Back Add Role Compare Search: copy_ ×
Compareî↓	Role Name 🛛 🕅	Role Description	ti Actions ti
	COPY_DL TEST	IA-52785	202
	COPY_USER_ADMIN	Role for User Admins	2 • C
Showing 1 to	2 of 2 entries (filtered from 45 to	tal entries)	Previous 1 Next
		Go Back	

2. Click in the Actions column to display the *Edit Role* page as shown in the example.

Role	Role Permission Categories			
ROLE N/	AME			
Copy_	DI Test			
ROLE DE	SCRIPTION			
IA-527	85			
ACCESS	LEVEL		RESTRICT TO AGENCY	
2000	- DBA Functions	~	-Select-	~
		Go Back	Save	

- 3. If needed, make changes to the **Role Description** and **Access Level** fields. (**Role Name** cannot be changed.)
- 4. Continue with Step 5 or go directly to Step 7, as appropriate.
- 5. Click **Role Permission Categories** tab to display the *Role Permission Categories* page as shown in the example.

ole Name: Copy_DI Test				
items selected	Remove all	Add		
Administration - Manage System	- Administration - Activate Users in Agency	+		
	 Administration - Activate Users in Organization 	+		
Administration - Product Module Configuration	 Administration - Activate Users in System 	+		
	 Administration - Add County 	+		
	Administration - Add Supervised Agencies to Use	r +		
	Administration - Agency Admin	+		
	Administration - Agency Civil Process Admin	+		
	Administration - Agency Field Arrest Admin	+		
	Administration - Agency Officer Daily Admin	+		
	Administration - Agency Setup Wizard	+		
	Administration - Always Access Tables Administra	tion +		
	Administration - Application Settings	+		
	Administration - Change Users Password in Agen	cy +		
	Administration - Change Users Password in Organ	hization +		
	Administration - Change Users Password in Syste	m +		
	Administration - Code Tables	+		
	Administration - Deactivate Users in Agency	+		

- 6. Remove or add permissions to this role for your agency as follows:
 - In the panel to the left, click (minus sign) to the far right in the same line to remove that permission.
 - In the panel to the right, click (plus sign) to the far right in the same line to add that permission.
 - Repeat as needed until you have removed or added permissions to tailor this role to your agency's needs.
- 7. Click **Save** at the bottom of the page to save changes and return to the *Roles* page.

Add Role

Use the following procedure to add a role for your agency.

1. From the *Roles* page, click the <u>Add Role</u> button in the upper right corner to display the *Add Role* page as shown.

ROLE NAME		
ROLE DESCRIPTION		
ACCESS LEVEL	RESTRICT TO ORGANIZATION	
-Select-	 ✓ -Select- 	~
	Go Back Save	

- 2. Type the name you want to use for this role in the **Role Name** field. The name must be unique.
- 3. Optionally, type a **Role Description** you want to use.
- 4. Click I to the far right in the Access Level field to display a list of selections as shown in the following example. This list may vary by agency.

A /		CC .	LEV	
A	LLE	33	LEV	EL.

-Select-
2000 - DBA Functions
1500 - System/Organization Admin Functions
1400 - Agency Admin Functions
1000 - Other Admin Functions
900 - Common Supervisor Functions
800 - Common Clerk Functions
700 - Evidence Functions
600 - Common Entry Functions
500 - Common View Functions
801
802
803

- 5. Select the appropriate level of access for this role.
- 6. If applicable, click 🛨 to the far right in the **Restrict to Organization** field to display a list of selections, and select the appropriate option.
- 7. Click **Save** to save this record and display the system message, *Role details added successfully.*
- 8. Click **Role Permission Categories** tab to display the *Role Permission Categories* page as shown in the example.

items selected	Remove all		Add all
Basic Access		Administration - Activate Users in Agency	+
Broadcast Messages - Add and Edit	- ^	Administration - Activate Users in Organization	+ ^
Broadcast Messages - Delete A Message	-	Administration - Activate Users in System	+
	-	Administration - Add County	+
Calls For Service - Create New Incident From Call	-	Administration - Add Supervised Agencies to User	+
Calls For Service - Open a Closed Call For Edit	-	Administration - Agency Admin	+
	-	Administration - Agency Civil Process Admin	+
	-	Administration - Agency Field Arrest Admin	+
	-	Administration - Agency Officer Daily Admin	+
External Search	-	Administration - Agency Setup Wizard	+
	-	Administration - Always Access Tables Administration	+
	-	Administration - Application Settings	+
	-	Administration - Change Users Password in Agency	+
	-	Administration - Change Users Password in Organization	+
	-	Administration - Change Users Password in System	+
	-	Administration - Code Tables	+
Notifications - Add Notifications	- ~	Administration - Deactivate Users in Agency	+ ~

- 9. Add permissions to this role for your agency as follows:
 - In the panel to the right, click (plus sign) to the far right in the same line to add that permission.
 - Repeat as needed until you have added permissions to tailor this role to your agency's needs.
 - If you add a permission by mistake, click = (minus sign) in the left panel to the far right to remove that permission.

- **10.** Click **Save** at the bottom of the page to save your changes.
- 11. Review permissions and continue as follows:
 - If needed, make additional changes and click **Save** to return to the *Edit Role* page.
 - If changes are not needed, click **Go Back** to return to the *Edit Role* page.

12. Continue as follows:

- If needed, make changes and click **Save** to return to the *Roles* page.
- If changes are not needed, click **Go Back** to return to the *Roles* page.

Copy Role

To save time setting up a new role, you have the ability to copy one role to another role if they have similar traits. During the copy process, you can update the new role as needed.

Note: Never edit Roles that came with the software; make a copy of the Role then edit the copy as needed. For details on how to edit a Role refer to "Edit Role" on page 79.

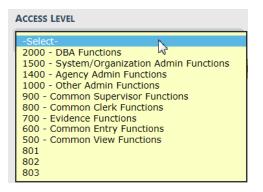
Use the following procedure to copy one role to another role for your agency.

1. From the *Roles* page, locate the role you want to copy then click the *Copy* icon under the *Actions* column to display the *Copy Role* page as shown.

Compare î↓	Role Name 🌐	Role Description	Actions	
	COPY_DL TEST	IA-52785	? • C	

Copy Role	
ROLE NAME	
COPY_COPY_DL TEST	
DESCRIPTION	
IA-52785	
ACCESS LEVEL	
2000 - DBA Functions	~
RESTRICT TO ORGANIZATION	
	~
	Cancel Save

- 2. Type the name you want to use for this role in the **Role Name** field, or keep the name that appears by default. The name must be unique.
- 3. Type a **Description**, or keep the default description.
- 4. Click I to the far right in the Access Level field to display a list of selections as shown in the following example. This list will vary by agency.



- 5. Select the appropriate level of access for this role.
- 6. If applicable, click I to the far right in the **Restrict to Organization** field to display a list of selections, and select the appropriate option.
- 7. Click **Save** to save this record and display the system message, *Role details added successfully.*
- 8. Click Role Permission Categories tab to display the *Role Permission Categories* page as shown in the example.

items selected	Remove all	Add
Administration - Manage System	Administration - Activate Users in Agency	+
Administration - Product Field Arrest Admin	Administration - Activate Users in Organization	+
Administration - Product Module Configuration	Administration - Activate Users in System	+
Administration - Show The Main Administration Menu	- Administration - Add County	+
	Administration - Add Supervised Agencies to User	+
	Administration - Agency Admin	+
	Administration - Agency Civil Process Admin	+
	Administration - Agency Field Arrest Admin	+
	Administration - Agency Officer Daily Admin	+
	Administration - Agency Setup Wizard	+
	Administration - Always Access Tables Administration	n +
	Administration - Application Settings	+
	Administration - Change Users Password in Agency	+
	Administration - Change Users Password in Organiz	ation +
	Administration - Change Users Password in System	+
	Administration - Code Tables	+
	Administration - Deactivate Users in Agency	+

- 9. Add permissions to this role for your agency as follows:
 - In the panel to the right, click ± (plus sign) to the far right in the same line to add that permission.
 - Repeat as needed until you have added permissions to tailor this role to your agency's needs.
 - If you add a permission by mistake, click = (minus sign) in the left panel to the far right to remove that permission.
- **10.** Click **Save** at the bottom of the page to save your changes.
- 11. Review permissions and continue as follows:
 - If needed, make additional changes and click **Save** to return to the *Edit Role* page.
 - If changes are not needed, click **Go Back** to return to the *Edit Role* page.
- **12.** Continue as follows:
 - If needed, make changes and click **Save** to return to the *Roles* page.
 - If changes are not needed, click **Go Back** to return to the *Role*spage.

Compare Role

Compare two or more roles to understand permission differences between them, and to identify potential duplicates.

Use the following procedure to compare roles for your agency.

1. From the *Roles* page, place a check mark on each role you want to compare, then click the **Compare** button on the top right of the window.

Show 10	• entries	S	Back Add Role Compa	are
Compareî↓	Role Name 🛛	Role Description	Actions	11
	COPY_DL TEST	IA-52785	€ • C	
	DL TEST	IA-52785	€ 🛛 🗹	
	IBR	Test role created by Ang for IBR permissions.	€ ⊕ ⊄	
	ROLE TO TEST CASE MANAGEMENT	Created by Ang	€ 🛛 🗹	

2. The *Compare Roles* page opens, listing the permissions each roles you chose to compare. The differences between roles are highlighted in red. You can also click the arrow button at the top of each role to change the permission sort order.

Roles / Compare Roles						
					Go Back	
Role Name Only diffe			Role Name	Role Description		
Copy_DI Test between	roles IA-52785		DI Test	IA-52785		
Access Level	Organization		Access Level	Organization		
2000			2000			
Copy_DI Test Permissions		ţ1.	DI Test Permissions		Ť1	
Administration - Manage S	ystem		Administration - Product	Field Arrest Admin		
Administration - Product Field Arrest Admin			Administration - Product	Module Configuration		
Administration - Product Module Configuration			Administration - Show Th	e Main Administration Menu		
Administration - Show The M	fain Administration Menu			Previous 1	Next	
	Previous 1	Next				

3. Click the **Back** button on the top right of the page to return to the *Roles* page.

Chapter 6. Security Groups

Within an agency, security groups can be created to provide additional security for certain kinds of records. For example, an agency might want to restrict access to open cases except for those individuals who are working on and/or supervising the progress of those cases.

Access Security Groups Module

Security Groups for an agency can be added, edited, and deleted via the Security Groups module. Users with the appropriate administrative permissions can access the Security Groups module as follows:

From the Home page,

- hover the cursor over the Administration menu/label to display a drop-down menu and select the Security Groups option, or
- from the Administrative Home page, click the Security Groups icon.

The Security Groups page displays as shown.

Show 10	• entries		Go Back Add Security Group Search:		
ID 1	Security Group Name	Agency Description	11 Actions 11		
1	Admins	District 21, Toll Road - SC	6		
2	Case & Incident Dist 21 ONLY	District 21, Toll Road - SC	e		
3	DIC	District 16, Peru - GA	d		
4	Dist 16 CID users	District 16, Peru - GA	e		
5	Dist 21 CID Members Only	District 21, Toll Road - SC	e		
6	District 16 and 21 Patrol	District 21, Toll Road - SC	Z		
7	Internal Affair	District 52, Indianapolis	Z		
8	Multi-Agency Group	District 21, Toll Road - SC	e		
9	NO AGENCY TEST		d		
10	Test 42	District 42, Versailles	6		
Showing 1	to 10 of 10 entries		Previous 1 Next		
Go Back					

From this page, administrative users with the appropriate roles/permissions can edit existing security groups, delete security groups, and add new security groups for the agency.

- "Edit Security Group" below.
- "Delete Security Group" on page 90
- "Add Security Group" on page 90.

Edit Security Group

Use the following procedure to edit a security group.

- 1. From the Security Groups page, locate the record to be changed, using one of the following methods:
 - Scroll down the list of groups until you locate the one you want to edit.
 - Use the **Search** fields to return the record.

D 1↓	Security Group Name	Agency Description	11 Ac	tions î
2	Case & Incident Dist 21 ONLY	District 21, Toll Road - SC		2 0
1	Dist 16 CID users	District 16, Peru - GA		e i
5	Dist 21 CID Members Only	District 21, Toll Road - SC		2

2. Click in the Actions column to display the *Edit Security Group* page as shown in the example.

	Go Back
NAME	
Dist 16 CID users	
AGENCY	
District 16, Peru - GA	~
Security Group Users	
SELECT USER	
SELECTED USERS	
Masterson,Bat (cid) R (District 16, Peru - GA) Goodman,Charles (cid) H (District 16, Peru - GA)	
ENFORCE EXCLUSIVE ACCESS	
Go Back Update	

- 3. If needed, make changes to the Agency field. (The Name field cannot be changed.)
- 4. Change the users listed in the Selected Users field as follows:
 - a. To add users, click into the **Select User** field and begin typing the first or last name to display a list of users that match your entered text, then select one or more from the list to add it to the **Selected Users** box.

Security Group Users			
SELECT USER			
ch			×
Chuck (evid) Albert - District 14, Lafayette	⊳	^	
Herman (cid) Chapman - District 22, Ft Wayn	e		
In Ch arge - District 52, Indianapolis			
In Ch arge - Indiana State Police		J	
		*	

- b. To remove a user from the **Selected Users** box, select the name and **double-click** on the name.
- 5. To select users from another agency, click the **Agency** field and choose from the drop-down list. Follow the previous step to add or remove users for that agency.
- 6. Click **Update** to save changes and return to the Security Groups page.
- 7. Click Go Back to return to the Administrative Home page

Delete Security Group

Use the following procedure to delete a security group record.

- 1. On the *Administrative Home* page, click the **Security Groups** icon to display the *Security Groups* page.
- 2. In the Action column, click in the same row as a security group listing to display the prompt, *Are you sure you want to delete this Work Group?*
- 3. Click Yes to confirm deletion and close the window.

The listing no longer appears on the Security Groups grid.

Add Security Group

Use the following procedure to add a security group for your agency.

1. From the Security Groups page, click the Add Security Group button in the upper right corner to display the Add Security Group page as shown.

		Go Back
NAME		
1		
AGENCY		
Select Agency		~
Security Group Users		
SELECT USER		
		
SELECTED USERS		
ENFORCE EXCLUSIVE ACCESS		
	Go Back Save	

2. Type the name you want to use for this group in the Name field.

3. Click into the **Agency** field to display a list of selections as shown in the following example.

AGENCY			
Select Agency	N		
ANGTESTAGENCY	13		
A_standalone Pd			
All Other			
Ang Police Department			
Area Units-A1			
Area Units-A2			
Area Units-A3			
Area Units-A4			
Area Units-A5			
Asdfad			
Baxter Pd			
CAR and X Units			
CID			

- 4. Select the agency for which you are adding this group.
- 5. Add users to this group as follows:
 - a. To add users, click into the **Select User** field and begin typing the first or last name to display a list of users that match your entered text, then select one or more from the list to add it to the **Selected Users** box.

ecurity Group Users			
SELECT USER			
ch			×
Chuck (evid) Albert - District 14, Lafayette	>	^	
Herman (cid) Ch apman - District 22, Ft Wayne			
In Ch arge - District 52, Indianapolis			
In Ch arge - Indiana State Police		J	
		~	

- b. To remove a user from the **Selected Users** box, select the name and **double-click** on the name.
- 6. To select users from another agency, click the **Agency** field and choose from the drop-down list. Follow the previous step to add or remove users for that agency.
- 7. Check the Enforce Exclusive Access box, if applicable.
- 8. Click **Save** to save and return to the Security Groups page.

Chapter 7. Manage Users

Users Overview

Administrators with the appropriate permissions can add and update users to an agency or schema.

- One user may be permitted to log into different schemas, depending upon the roles assigned to that user.
- A user has multiple roles, depending upon the tasks that user is expected to perform.
- User names cannot be deleted, only disabled (made inactive).
- A user name can only be used once within one database.
- An administrator with the appropriate permissions can emulate another user and view that user's screens to troubleshoot.

Manage Users

From the Administration Homepage, click the **Users** icon to open the Manage Users page. (Alternatively, select **Users** from the Administration drop-down menu.) For details on accessing the Administration Homepage refer to "Access Administration" on page 1.

anage U	sers								
		_							Go Back Add User Mass User Entry
User Acc	counts I	og							
Search	hicks		S	tatus A	Active	 Subscri 	ption Level	-All-	Reset Search
									Show 100 ¢ entries
First 11	Middle 🔃	Last 11	User 11 Name	Status	s 11 Subscription 11 Level	Agency 11	SA 🔃	User Role	Actions
Aaron		Hicks	ODL_US ER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	Edit - C - C - C - C - C - C - C - C - C -
Showing	1 to 1 of 1 e	entries							Emulate Delete Change Password
									Previous 1 Next
						Go Back	(

The *Manage Users* page contains buttons to add users, and two tabs: *User Accounts* and *Log.* The *User Accounts* tab opens by default.

Filter Results List

You can filter the results list by using the Search, Status, and Subscription Level search boxes. For example, to only list active user accounts, select *Active* in the Status field, or enter part of the person's name in the Search text box.

Click the **Search** button to display the search results based on the entries in the search fields.

Add User Buttons

You can add one user or enter multiple users by using the Add User or Mass User Entry button on the top right of the form.

To add one user, refer to "Add a User" on page 124.

To add multiple users, refer to "Add Mass Users" on page 126.

User Accounts Tab

From the User Accounts tab you can use the icons in the Action column to Manage User Accounts, Change Passwords, Deactivate or Activate Users, and Emulate Users.

- Edit 🗹 icon
 - Click the Edit icon under the Actions column to open the User Details page to update user roles, employee information, security settings, etc. See "User Details" on page 97 for more information.



- Emulate users 🛄 icon
 - Click the Emulate icon under the Actions column.
 - See "Emulate a User" on page 121 for instructions.

• Change passwords 🗖 icon

There are two ways to change a password: The Change Password or Edit Icon.

a. Change Password Icon

Click the **Change Password icon** under the *Actions* column to display the *Change Password* window.

Change Passwo	rd		
NEW PASSWORD			
CONFIRM PASSWORD)		
	Cancel	Change Password	Reset Via E-Mail

Enter **New Password** and re-enter to **Confirm**, then click **Change Password** or **Reset Via Email**.

b. Edit Icon

Click the **Edit icon** under the *Actions* column to open the *User Details* page, then click the **Change Password** link on the left sidebar navigation under *User Quick Links*. See "User Details" on page 97 for more information.

- Deactivate
 and Activate
 users icons
 - Click on the red or green person icon under the Actions column, whichever applies. (The example displays a red icon.)
 - See "Deactivate a User" on page 101 and "Activate a User" on page 100 for instructions.

Log Tab

Multi-tier organizations can temporarily assign a user to a different agency. Assignment changes are recorded automatically to a database log table. The *Log* tab allows you to view the assignment changes that have taken place.

Click on the Logtab to open the search screen.

					Go Back Add User M	lass User Entry
User Accounts Lo	9					
Agency		OLD AGENCY	DATE FROM		D ATE T O	
-Select-	•	-Select-	•	曲		
ASSIGNEE		Туре				
		All	Ŧ			
			Reset			
			Go Back			

Enter your **search criteria**, then click the **Search** button to list records that match your entered data.

- Select a specific Agency. To select all, leave the choice as -Select -.
- Select a specific Old Agency. To select all, leave the choice as -Select -.
- Select the **Date From** and **Date To**, or leave them blank to select all dates.
- Enter all or part of the Assignee name, or leave it blank to select all.
- Select the **Type** of assignment.

Note: The **Type** *Home* means the default agency association changed to another agency within the organization.

lanage Users											
User Accounts	Log								Go Back	Add User Mass U	User Entry
Agency		OLD	AGENCY		Da	te F ro	ом		DATE TO		
Area Units-A1	Ŧ	-s	elect-		• ·			苗			苗
ASSIGNEE		Туре									
		AI			*						
					Reset Sear	ch					
Agency	1 Old Agency	11	Assigner	11	Assignee	١t	Start Date 💷	End Dat	te Li	Туре	⊥1
Area Units-A1	Area Units-A1		Brent (officer) Williams		Brent (officer) Williams		02/15/2018 15:38			Home	
A			Ralph Lauren		Ralph Lauren		06/01/2012 24:00			Assignment	
Area Units-A1											

User Details

The User Details is a landing page that contains an organized set of links to various user settings and functions, such as security settings, officer information, employee information, profile information, change password, deactivate or activate account, and more.

Manage Users / User Details						
🛓 Dana M	Profile Information					Go Back Emulate
User ID: D_OFFICER						
Status: Active	User Information					
Type: Full Time Organization: Indiana State Police		First Name		MIDDLE NAME		Last Name
Home Agency: District 42, Versailles		Dana				м
Officer: No		•				
Employee: Yes - Active		TELEPHONE		E-MAIL		E-MAIL ENABLED
User Quick Links				JK @h	cor	
Deactivate User		SUBSCRIPTION LEVEL				
Change Password		Full Time	~			
Change Home Agency						
Create Assignment Go To						
Profile Information						
Security Settings						
Preferences						
External Searches						
Subscriptions						
Agency & Assignments						
Officer Information						
Employee Information						
Jurisdictions						
Account History						

A photo of the employee can be uploaded via the Employee Management page. For details, refer to "Manage an Employee" on page 136.

Access User Details

- 1. Access the *Manage Users* page from the *Administration* menu on the top menu bar. For instructions, refer to "Manage Users" on page 93.
- 2. Access the User Details page from the Manage Users page by editing or adding new users.

Manage U	sers								
User Ac	counts L	og							Go Back Add User Mass User Entry
Search	hicks		St	atus Acti	ve	 Subscr 	iption Level	-All-	Reset Search Show 100 🜩 entries
First 11	Middle 🔃	Last 🔃	User 🔃 Name	Status 🔃	Subscription 11	Agency 1	SA 11	User Role	Actions
Aaron		Hicks	ODL_US ER	Active		District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	Edit - C - C - C - C - C - C - C - C - C -
Showing	1 to 1 of 1 e	ntries							Change Password Previous 1 Next
						Go Bad	k		

User Details Page Layout

The User Details page contains three sections on the left sidebar of the window:

🛓 Dana M							
User ID: D OFFICER							
Status: Active							
Type: Full Time							
Organization: Indiana State Police							
Home Agency: District 42, Versailles							
Officer: No							
Employee: Yes - Active							
User Quick Links							
Deactivate User							
Change Password							
Change Home Agency							
Create Assignment							
Go To							
Profile Information							
Security Settings							
Preferences							
External Searches							
Subscriptions							
Agency & Assignments							
Officer Information							
Employee Information							
Jurisdictions							
Account History							

• User Information.

- Various user information, such as the user id, an active or inactive user account, whether the user is full or part time, the organization and home agency of the user, whether or not the user is an officer, and whether the user is an active or inactive employee.
- This section is read-only.
- Quick Links.
 - Links for quick access to specific functions, such as the ability to quickly deactivate or inactivate the user, change the password, change their home agency, and create an assignment.

"Deactivate a User" on page 101

"Activate a User" on the next page

"Change Password" on page 102

"Change Home Agency" on page 104

"Create Assignment" on page 105

- Go To.
 - These are tabs to other user settings, such as Subscriptions, Officer Information, Preferences, and more.
 - Click a tab to display the user settings for that tab. For example, click Preferences to view and update notification and other preference settings.
 - The Profile Information tab opens by default when you access the User Details landing page.
 - Click on a tab under the Go To section of the left sidebar to access the tab. Profile Information is used in the below example.

Profile Information			Go Back Emulate Update
User Information			
	First Name	MIDDLE NAME	Last Name
	Dana		м
	TELEPHONE	E-MAIL	E-MAIL ENABLED
		JK @ha	
	SUBSCRIPTION LEVEL		
	Full Time	~	

Refer to the following for tab details:

"Profile Information Tab" on page 106

"Security Settings Tab" on page 106

"Preferences Tab" on page 108

"Subscriptions Tab" on page 110

"Agency & Assignments Tab" on page 111

"Officer Information Tab" on page 113

"Employee Information Tab" on page 115

"Jurisdictions" on page 117

"Account History" on page 120

Activate a User

Use the following procedure to activate a user.

- 1. Access the *Manage Users* page. For more information, refer to "Manage Users" on page 93.
- 2. Locate the user to *Activate* and click on the **green person** icon in the *Actions* column on the user record.

lanage Users										
										Go Back Add User
User Accounts	Log									
a sut					Deactivated	T Subra		All-	Reset Search	Show 100 ¢ entries
Search			St	tatus	Deactivated	• Subsc	ription Level	AII-	, Reset Search	
First 🗈 Mi	iddle 11	Last		Jser	1 Status 11	Subscription 1	Agency 11	SA 11	User Role	Actions
			N	Name		Level				
Angeline		Ng		OFFICE ANG	R Deactivated	Full Time	Indiana State Police	Default	AGENCY_ADMIN DBA SYSTEM_ADMIN	

Note: The system does not allow you to create or reactivate an RMS user with a duplicate badge number.

Note: Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of **User Subscriptions**. If your agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional subscriptions, or deactivate an existing user account. For more information on **User Subscriptions**, refer to "Agency Information Tab" on page 18 of the Agency Profile.

You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

3. Enter a reason for activating the user and click **Activate** to confirm, or **Cancel** to return to the *Users Lookup* page.

Activate User	
Please enter reason to activate this User:	
	1
	Cancel Activate

Deactivate a User

Use the following procedure to deactivate, or disable, a user record to make them inactive.

- 1. Access the *Manage Users* page. For more information, refer to "Manage Users" on page 93.
- 2. Locate the user to *Deactivate* and click on the **red person** icon in the *Actions* column on the user record.

Aanage Use									
									Go Back Add User
User Acco	ounts Lo	9							
				IS Active		1		lle T Pasat Saard	Show 100 ¢ entries
Search			Statu	IS ACTIVE		Subscription I	.evel -A	II- • Reset Search	5now 100 € entries
First 👔	Middle 🕮	Last 11		Status 🔃	Subscription 11	Agency 11	SA 11	User Role	Actions
			Name		Level				
Aaron		Hicks	ODL_US ER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	r 🛎 🖻 📘

3. Enter a reason for deactivating the user and click **Deactivate** to confirm, or **Cancel** to return to the *Manage Users* page.

Deactivate User	
Please enter reason to deactivate this User:	~
	Cancel Deactivate

Change Password

Administrators can change a user's password when the user has forgotten their password or is locked out.

However, users are encouraged to reset their own password using the **forgot password** link on the login page. Refer to the *Forgotten Password Procedure* section in the *Online RMS User Guide* for instructions.

There are two ways to reset a user's password:

- From the Manage Users page.
- From the Users Detail page.

Reset from Manage Users Page

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click on the Change Password icon.

fanage Users											
										Go Back	Add User Mass User E
User Acco	ounts Log	g									
				1		1					
Search	saur		Statu	5 Active	~	Subscription	Level -	All-	✓ Reset	Search	Show 100 \$ ent
First 1	Middle 11	Last 11		Status 🛍	Subscription 11	Agency 🛍	SA 11	User Role		Actions	
			Name		Level						
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK			C 🛎 👂 🕹

Reset from Users Detail Page

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click on the Edit icon to open the Users Detail page.

lanage Us	ers									
User Acc	ounts Lo	ka							٩	o Back Add User Mass User Entry
Search	saur		Statu	s Active	~	Subscription	Level -	-All-	✓ Reset Search	h Show 100 ¢ entrie
First 11	Middle	Last 11	User 11 Name	Status 11	Subscription 11 Level	Agency 11	SA 11	User Role		Actions
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK		C 🛎 👂 占

3. Click Change Password.

Manage Users / User Details
Christine SaurTest
User ID: CSAURTEST3
Status: Active
Type: Full Time
Organization: Indiana State Police
Home Agency: District 42, Versailles
Officer: No
Employee: Yes - Active
User Quick Links
Deactivate User
Change Password
Change Home Agency
Create Assignment
Go To
Profile Information

Change Home Agency

Administrators can change a user's home agency from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click on the Edit icon to open the Users Detail page.

/lanage Use	rs										
										Go Back	Add User Mass User Entry
User Acco	unts Log	,									
Search s	aur		Statu	s Active	~	Subscription	Level -	All-	✓ Reset Se	arch	Show 100 \$ entries
First 11	Middle	Last 11		Status 11	Subscription 11	Agency 11	SA 11	User Role		Actions	;
			Name		Level						
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK			6 2 2

3. Click Change Home Agency.

Manage Users / User Details
Christine SaurTest
User ID: CSAURTEST3
Status: Active
Type: Full Time
Organization: Indiana State Police
Home Agency: District 42, Versailles
Officer: No
Employee: Yes - Active
User Quick Links
Deactivate User
Change Password
Change Home Agency
Create Assignment
Go To
Profile Information

4. Select the Home Agency from the drop-down list.

Change Home Agency	
District 42, Versailles	~
	Cancel Save

5. Click Save.

Create Assignment

Administrators can create a user's assignment from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click on the Edit icon on the Manage Users page to open the Users Detail page.

lanage Us	ers									
									(Go Back Add User Mass User Er
User Acco	ounts	Log		r						
Search	saur		Statu	s Active	~	Subscription	Level -	All-	✓ Reset Sea	rch Show 100 \$ entr
First 1	Middle	ti Last ti	User 11 Name	Status 🕮	Subscription 11	Agency 11	SA 11	User Role		Actions
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK		C # P 占

3. Click Create Assignment.

Manage Users / User Detail
Christine SaurTest
User ID: CSAURTEST3
Status: Active
Type: Full Time
Organization: Indiana State Police
Home Agency: District 42, Versailles
Officer: No
Employee: Yes - Active
User Quick Links
Deactivate User
Change Password
Change Home Agency
Create Assignment
Go To
Profile Information

4. In the New User Assignment dialog box opens.

New User Assignment				
Assignment				
-Select-				~
START DATE		END DATE		
	曲			曲
Астіче				
			Cancel	Save

- 5. Select the Assignment from the drop-down list.
- 6. Select the Start Date.
- 7. Optionally, select an End Date.
- 8. Deselect Active if you do not want enable this setting at this time, otherwise, keep it checked.
- 9. Click Save.
- 10. Click the **Update** button on the top right of the window.

Profile Information Tab

The *Profile Information* tab of the *User Details* page contains basic user contact information.

Profile Information			Go Back Emulate Update
User Information			
	First Name	MIDDLE NAME	Last Name
	Christine		SaurTest
	TELEPHONE	E-MAIL	E-MAIL ENABLED
	5551112222	ccsa	
	SUBSCRIPTION LEVEL		
	Full Time	*	

For details on accessing the User Details page, refer to "User Details" on page 97.

Make any necessary changes then click the **Update** button to save changes.

To Emulate a user, refer to "Emulate a User" on page 121.

Security Settings Tab

The Security Settings tab of the User Details page contains settings, such as roles and security levels assigned to the user, two factor authentication, mobile integration, and Team Support login id.

Roles and Security Levels

- 1. Click I in the **Incident Security Level** field and select the appropriate incident security level for this user.
- 2. Click I in the **Index Security Level** field and select the appropriate index security level for this user.

Level 1 is the lowest security level; users with this security level have access only to data that has not been restricted. Level 3 is the highest level; users with this security level have access to all data.

- 3. Check the **Is Caliber Employee System Admin** box if this employee is an agency admin, or leave it blank.
- 4. Click on one or more **Roles** to *select* from the list of roles that appear on the left.

To *deselect* a role, click a **Role** on the right.

You can also shorten the roles list by using the **Search** text box. Enter part of the role name to shorten the list by your entered text.

Optionally, use the Select All or Select None button to quickly select or deselect all.

5. Click into the **Security Groups** text box, then select one or more security groups from the list of groups that appears. This feature is the same as that described for Roles.

Two Factor Authentication

- 1. Check the box to Enable.
- 2. Optionally, type the User Name.

Mobile Integration

- 1. Enter the **Mobile User Name**, if applicable.
- 2. Enter a Terminal ID, if applicable.
- 3. Enter the Unit ID, if applicable.
- 4. Enter the One Time Password User Name, if applicable

Team Support

If configured for your agency, users with a Team Support account can sign into Team Support from within Online RMS using the single sign-on feature.

The following criteria must be met to utilize this feature:

- The Team Support SSO feature must be enabled for the agency.
- And the agency admin must have the permission category Support Set Team Support SSO ID to see and enter the Team Support Login ID on the User Admin page.
- And the user must have the following to submit tickets using SSO:
 - Permission category Support Access Team Support SSO assigned to their role.
 - Permission category *ESSupport submit tickets* assigned to their role.
 - Team Support Login ID.

Follow these steps to grant access to user:

- 1. Enter the user's Team Support Login ID or leave it blank.
 - Suppose a login id exists and the user chooses to submit a ticket from within Online RMS. In that case, a new browser window opens, logging the user into the Team Support website automatically, where they can submit a ticket.
 - Suppose the login id field is blank and the user chooses to submit a ticket from within the Online RMS. In that case, an Online RMS Support form opens, where they can submit a ticket or provide feedback to Caliber Staff without logging into Team Support.

For more information on submitting support tickets, refer to the *Caliber Online RMS User Guide*.

When finished updating the User, click **Update** on the top right of the window.

Preferences Tab

Administrators can update the user's preferences from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click the Edit icon on the Manage Users page.

vlanage U	sers										
										Go Back Add Use	r Mass User Entry
User Ac	counts Lo	g									
Search	saur		Statu	s Active	~	Subscription	Level -	-All-	✓ Reset Sea	arch Show	100 ¢ entries
First 1	Middle	Last 11	User 11	Status 11	Subscription 11	Agency 1	SA 11	User Role		Actions	
			Name		Level	, gainey in					
Christine	2	SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK		C	÷ 👂 🔼

3. Click Preferences on the User Details page.



4. Preferences opens.

							Go Back	Save		
ODL_USER - Profile Information	Security Settings	Preferences	Subscrip	otions	Officer Information	Employee Information				
Notification Settings							C Edit User	Filters		
EMAIL NOTIFICATIONS PRIORITY					ALERT					
Select			•							
HOURS FOR NOTIFICATIONS					SEND SUBSCRIPTION NOT	IFICATIONS				
Begin	End									
Options										
INCIDENT SETUP WIZARD				Day / Night Mode						
On			•	Normal / Day Mode						
BREADCRUMB OPTIONS				DEFAUL	SEARCH AGENCY					
Enabled - Always show Breadcr	rumbs on pages that	use them	•	All A	gencies/Schema			۲		
Default Search Interfaces										
SELECT SEARCH INTERFACES Q										
Click To Select										
Geographic Areas										
COURT PAPERS Q										
Click To Select										
WARRANTS Q										
Click To Select										
		(Go Back	Save]					

- 5. Complete the form as needed.
- 6. Optionally, click the Edit User Filters link to include or exclude this user in or from user groups.

For more information on *Preferences*, refer to the *Online RMS User Guide*.

Subscriptions Tab

The **Subscriptions** tab displays existing subscriptions for the user you are viewing.

								Go Bac
OFFICER_DMM -	Profile Information	Security Setting	s Preferences		Officer Information	Employee Information		
					_		•	Add Subscriptio
Name ↓î	Туре	tt I	ndex Name	↓† F	leason		Creation ↓↑ Date	Actions
Vehicle	Index Accessed		336	A	sdf		05/04/2017	2 💼
Property	Index Accessed	A	APPLIANCE 1588	A	sdf		05/03/2017	2

Click the edit icon to edit the subscription, or click the trash icon to delete the subscription.

With appropriate permissions, users can **Subscribe** to existing master index records (person, address, vehicle, etc.) to receive notification when someone views, updates or associates records to which they have interest.

For example, users can **Subscribe** to Williams Jones' master person record to receive notification when someone applies updates to his master person record.

For more information on creating a new subscription, refer to the Master Indices chapter in the *Caliber Online RMS User Guide*.

Agency & Assignments Tab

Administrators can update the user's agency and assignments from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click the Edit icon on the Manage Users page.

lanage Use	ers								
									Go Back Add User Mass User Ent
User Acco	unts Log	,							
Search s	aur		Statu	s Active	~	Subscription	Level	-All-	✓ Reset Search Show 100 ♀ entrie
First 11	Middle	Last 11		Status 11	Subscription 11	Agency 11	SA 11	User Role	Actions
			Name		Level				
Christine		SaurTest	CSAURTE	Active	Full Time	District 42,	Default	LEA_CLERK	🕜 🛎 👂 🔼

3. Click Agency & Assignments on the User Details page.



4. Agency & Assignments opens.

Agency & Assignr	nents	Go Back Emulate Update
Self Assignment		
ENABLE SELF	Agencies User Can Self Assign To (No Selection	N = ALL)
Assignment	Search	Select All Select None
Default 🗸	Area Units-A1	
	Area Units-A2	
	Area Units-A3	
	Area Units-A4	
	Area Units-A5	
	CAR and X Units	
	CID	
	CIS-CID 🗸	
Supervised Agencies		
SELECT SUPERVISED AGEN	CIES	
Search		Select All Select None
Area Units-A1	A	
Area Units-A2		
Area Units-A3		
Area Units-A4		
Area Units-A5		
CAR and X Units		
CID		
CIS-CID	-	

- 5. Change the **Enable Self Assignment** to *No* if you do not want the user to selfassign. Otherwise, leave it as *Default* to use the setting set for your agency, or change it to Yes to allow the user to self-assign.
- 6. If applicable, limit the **agencies** to which the user can self-assign, otherwise do not select any agencies from the list if you want the user to have the ability to self-assign with all agencies.
- 7. If applicable, select Supervised Agencies.
- 8. Click the Update button.

Officer Information Tab

Administrators can update the user's officer information from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click the Edit icon on the Manage Users page.

Manage Users							
						Go	Back Add User Mass User Entry
User Accounts Log						_	
Crunt Louis	Status	Antina	✓ Subscriptio	a Laural	A.II.	× Reset Search	Show 100 ¢ entries
Search saur	Status	Active	✓ Subscriptio	n Level	All-	 Reset Search 	Show 100 ¢ entries
First 11 Middle11 L			cription 1 Agency 1	SA 11	User Role		Actions
	Name	Level					
Christine S	aurTest CSAURTE ST3	Active Full Ti	ime District 42, Versailles	Default	LEA_CLERK		12 🛎 P 📥

3. Click Officer Information on the User Details page.

Go To							
Profile Information							
Security Settings							
Preferences							
Subscriptions							
Agency & Assignments							
Officer Information							
Employee Information							
Jurisdictions							
Account History							

4. Officer Information opens.

												Go Ba
OFFICE	R_DMM - Prof	file Informa	ntion Sec	urity Settings	Prefere	ences Subscription	s Officer Infor	nation	Employee Inform	ation		
Officer	Informati	on										
FIRST NA	AME						AGENCY					
Dana							District 34, Jas	per				~
MIDDLE	NAME					1	BADGE #					
							DMM12345					
LAST NA	ME						DISPATCH ID		er mouse over Badge detail		ubble for	
McMilla	an						6008a	1	buugo uotun			
SUFFIX							CAD BADGE	-				_
							6008a				interfaces to	
TITLE							JOB STATUS	match	officers in RN	1S with	h CAD officer	5.
Patrol 0	Officer						🖌 Patrol 🗌 Dete	ctive 🗹 A	Active			
						Go Back Upd	ate Save					
Officer	History											
Date	Last Name	First Name	Middle Name	Suffix	Title	Agency	Badge Number	Dispatc Id	h CAD Badge	Patrol	Detective	Active
2017- 06-21	McMillan	Dana			Patrol Officer	District 42, Versaille	s DMM12345		6008a	Y	Ν	Ν
2017- 06-08	McMillan	Dana			Patrol Officer	District 34, Jasper	DMM12345		6008a	Y	Ν	Ν
2017- 02-02	McMillan	Dana			Patrol Officer	District 42, Versaille	s DMM12345		6008a	Y	Ν	Ν
2015- 07-23	McMillan	Dana			Patrol Officer	District 42, Versaille	s DMM12345			Y	N	Ν

If you receive a note stating no officer exists for the user, then click on the provided link to add one.

Officer Information	Go Back Emulate Save	
No C	Officer Record Exists for This U	Jser
	Click Here to Add One	

5. Complete each of the fields for which you have information.

Hover your mouse over the CAD Badge blue information bubble ¹ for mapping instructions with CAD users.

Note: For agencies with Caliber CAD spill integration with Online RMS, **CAD Badge** *must* match **Badge Number** in Caliber CAD.

Note: The system does not allow you to create or reactivate an RMS user with a duplicate badge number.

6. Click the **Update** button on the top right of the form to save.

Employee Information Tab

Administrators can update employee information from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click the Edit icon on the Manage Users page.

lanage Us	ers										
										Go Back	Add User Mass User Entry
User Acco	ounts	Log									
Search	saur		Stat	us Active	~	Subscription	Level -	-All-	✓ Reset	Search	Show 100 \$ entries
First 1	Middle	11 Last 1	User 1	Status 11	Subscription 11	Agency 11	SA 11	User Role		Action	5
			Name		Level						
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK			2 - 2 -

3. Click Employee Information on the User Details page.



4. Employee Info sub-tab opens.

mployee Information		Go Back Emulate
🐁 Employee Info 🔹 Training 🥌	Tabs	
	Active Status	User
	Active 🗸	CSAURTEST3
	Agency	
	District 42, Versailles	
Last Name	First Name	MIDDLE NAME
SaurTest	Christine	
Suffix	MAIDEN NAME	TITLE
		-Select-
Sex	RACE	Етниісіту
Female 🗸 🗸	White 🗸	-Select-
SSN	DOB	PLACE OF BIRTH
	曲	
Employee ID	Employee Type	Employee Level
	Patrol Sworn 🗸 🗸	-Select- 🗸
HAND DOMINANCE	BARGAINING UNIT	BLOOD TYPE
-Select- 🗸		-Select-
Longevity Date	HIRE DATE	END DATE
曲	曲	曲
	Go Back Update Save	
Employee History		0
Service History		Add Service History
C Education		• Add Education

Note: This page and the *Personnel Management Module* share the same employee data.

- 5. Complete the form, then click **Update** to save without archiving, or click **Save** to archive the employee record.
- 6. Optionally, click the **Training** tab to add training courses or certification to the employee record.

Employee Information	Go Back Emulate
Lemployee Info	
Courses	• Advanced Search • Quick Add Course
Certifications	O Add Certification 🚓
Eligible Ranks	

- a. Click the catalog icon 📠 to the right of **Course** to view the course catalog.
- b. Click the catalog icon 🚠 to the right of **Certifications** to view the certification catalog.

For more information on courses and certifications, refer to the "Training Module" on page 151.

7. Click **Go Back** to return to the *Manage Users* page.

Jurisdictions

You can update, add, enable or disable Jurisdictions.

Update or Add Jurisdiction

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click the Edit icon on the Manage Users page.

lanage Use	irs									
User Acco	unts Log	2							G	o Back Add User Mass User Entry
Search s	aur		Statu	s Active	~	Subscription	Level -	All-	✓ Reset Search	h Show 100 ¢ entries
First 11	Middle	Last 11	User 11 Name	Status 11	Subscription 11 Level	Agency 11	SA 11	User Role		Actions
Christine		SaurTest	CSAURTE ST3	Active	Full Time	District 42, Versailles	Default	LEA_CLERK		C = P 🔼

3. Click Jurisdictions on the User Details page.



4. Jurisdictions opens.

Jurisdictio	ns		Go Back Emulate Add Jurisdiction					
County ↑	Agency 11	Date Created 11	Date Disabled 🕦	Default 🔃	Active 🟗	Actions		
ISP Test (TSTC)	District 42, Versailles	10/22/2020		Yes	Yes			

Note: Click the **Emulate** button to emulate that user. For more information on emulating users, refer to "Emulate a User" on page 121.

- 5. If applicable, click Add Jurisdiction to add a jurisdiction.
 - a. Select a Jurisdiction from the drop-down list.
 - b. If applicable, select an Agency from drop drop-down list.
 - c. Click Save.

Change the Default Jurisdiction

You can change the default Jurisdiction when multiple Jurisdictions exist. Only one Jurisdiction can be marked as the default.

1. Click on the **Default Schema** icon to flag that entry as the default schema. The record without the Default Schema icon is considered the default.

Jurisdictions Go Back Emulate Add Jurisdiction									
County 1	Agency 11	Date Created 11	Date Disabled 11	Default 🔃	Active 🔃	Actions			
ISP Test (TSTC)	District 42, Versailles	10/22/2020		Yes	Yes	A			
State of Maryland (TSTD)	City Police Department	10/26/2020		No	Yes	*			
Jurisdictions			(Go Back	mulate Ac	ld Jurisdiction			
County 1	Agency 🛍	Date Created 11	Date Disabled 11	Default 🔃	Active 11	Actions			
ISP Test (TSTC)	District 42, Versailles	10/22/2020		No	Yes	*			
State of Maryland (TSTD)	City Police Department	10/26/2020		Yes	Yes	A			

• Hover your mouse over the icon to see a description of the icon.

Enable or Disable Jurisdictions

You can enable or disable Jurisdictions.

1. Click on the red paddle lock icon to **Disable** or the green icon to **Enable**.

Jurisdictions Go Back Emulate Add Jurisdiction							
County 1	Agency 11	Date Created 11	Date Disabled 🔃	Default 11	Active 11	Actions	
ISP Test (TSTC)	District 42, Versailles	10/22/2020		Yes	Yes		
State of Maryland (TSTD)	City Police Department	10/26/2020	10/26/2020	No	No		

2. Click Yes to confirm, or No to return to Jurisdictions without performing the requested change.

Account History

Caliber Public Safety Online RMS automatically captures and logs when users log in or out of the application and whenever user account statuses change.

The log files can be viewed for specific users from the User Details page.

- 1. Access the *Manage Users* page from the Administration top menu bar and search for the user account. For instructions, refer to "Manage Users" on page 93.
- 2. Click the Edit icon on the Manage Users page.

Vlanage U	sers										
									l	Go Back Add Use	r Mass User Entry
User Acc	counts Lo	a									
		2								_	
Search	saur		Statu	s Active	~	Subscription	Level -	-All-	✓ Reset Sear	rch Show	100 \$ entries
First 1	Middle 1	Last 11		Status 11	Subscription 11	Agency 11	SA 11	User Role		Actions	
			Name		Level						
Christine	2	SaurTest	CSAURTE	Active	Full Time		Default	LEA_CLERK		ď	æ 👂 🔼
			ST3			Versailles					

3. Click Account History on the User Details page.

N	/lanage Users / User Details
1 0	Christine SaurTest
Use	er ID: CSAURTEST3
Sta	tus: Active
Тур	e: Full Time
-	ganization: Indiana State Police
Ho	me Agency: District 42, Versailles
	icer: No
Em	ployee: Yes - Active
Use	er Quick Links
Dea	activate User
Cha	ange Password
Cha	ange Home Agency
Cre	ate Assignment
Go	То
	Profile Information
	Security Settings
	Preferences
	Subscriptions
	Agency & Assignments
	Officer Information
	Employee Information
	Jurisdictions
	Account History

4. Account History opens as read-only.

There are two tabs: Status History and Login History.

The Status History tab opens by default.

Account History	Account History							
Status History Login History								
Last Login Date 10/26/2020 1437		LAST PASSWORD CHANGE DATE 06/01/2020 1025						
Status 11	Date		User 11					
Active	11/18/2019 10:53		Joe Friday					
Locked-Inactive	11/15/2019 09:00		System Updated					
Active	06/13/2019 17:08		MICHELLE LEVI					
Locked-Inactive	06/13/2019 14:18		Christine Saur					
Locked-Inactive	06/13/2019 14:18		Christine Saur					
Active	02/13/2019 15:17		Christine Saur					
Active	11/15/2018 13:09		Joe Friday					
Locked-Inactive	10/15/2018 09:00		System Updated					
Active	02/23/2018 16:25		Joe Friday					
Locked-Inactive	02/14/2018 16:50		Christine Saur					
Locked-Inactive	02/14/2018 16:50		Christine Saur					

The Login History tab displays IP address information, among other data.

Account Histo	Account History Go Back Emulate									
Status History Login History										
100 • 26 1/1										
Login Date 🛛 🕮	Logout Date 🛛 🕮	IP Address 1	City 🔃	State 🕮	Country 🕮	Latitude 🕮	Longitude 🕮	Login Failed 14		
10/26/2022 18:58:31	10/26/2022 20:59:17	73.243.41.249	Littleton	US-CO	US	39.54371	-105.01366	No		
10/26/2022 18:58:26		73.243.41.249	Littleton	US-CO	US	39.54371	-105.01366	Yes - Invalid Password		
10/26/2022 18:53:38	10/26/2022 18:56:55	73.243.41.249	Littleton	US-CO	US	39.54371	-105.01366	No		
10/26/2022 13:18:04	10/26/2022 14:57:43	73.243.41.249	Littleton	US-CO	US	39.54371	-105.01366	No		
10/26/2022 13:18:00		73.243.41.249	Littleton	US-CO	US	39.54371	-105.01366	Yes - Invalid Password		

Emulate a User

Administrators, with appropriate permissions, can **Emulate** (act as) other users within their own agency. Emulation is a troubleshooting tool, allowing the administrator to look at a user account to determine the nature of a problem and facilitate solutions.

Note: Emulation activity is logged to the database for auditing and tracking purposes.

There are two ways to Emulate a user:

• From the Manage Users page.

• From the User Details page.

Manage Users Page

Use the following procedure to Emulate a user's account from the Manage Users page.

- 1. Access the *Manage Users* page and search for the user you want to emulate. For more information, refer to "Manage Users" on page 93.
- 2. Click on the emulate icon in the Actions column to display that user's Home page.

User Details Page

Use the following procedure to Emulate a user's account from the User Details page.

- 1. Access the User Details page for that user. For more information, refer to "User Details" on page 97.
- 2. Click the **Emulate** button on the top right of the window to emulate the user.

Emulate

Navigate Online RMS as the Emulated User

1. Whichever method you use to emulate a user, the **Home Page** appears as if you are that user.

	Incidents - Master Indices - Records Management -	Forms A	nd Reports - Help -		🚢 Christine SaurTest 👻	25/0 🔘
Nome						
Broadcast	Messages					
No Messa	ges To Display					
Notificatio	ons			Q Show All • Add Notification	Recent Activities	
-Filter By	Users- V	Searc	1		My Cases (Active Count)	0
Count	Notification Type	†1	Last Notification	11 Priority 11	My Case Activities (Active Cou	nt) 🗿
1	Welcome to Online RMS		10/22/2020 06:04 PM EST	Low/Informational	Forms For Review	2
47	WARRANT REMOVED FROM FIELD ARREST		10/21/2020 07:24 PM EST	High		
1	FORM REVIEW - Online Police Self-Reporting Form		10/20/2020 04:54 PM EST	High	Quick Links	manag
1	FORM REVIEW - test		10/20/2020 04:07 PM EST	High		
10	FORM REVIEW		07/29/2020 02:10 PM EST	High	External Links	manag
6	FORM REVIEW - INFORMATIONAL		02/14/2019 11:30 AM EST	High		
3	WARRANT LOG		11/14/2018 03:39 PM EST	High		
5	INCIDENT REPORT TRANSFERRED - CLERK		10/24/2018 11:59 PM EST	High		

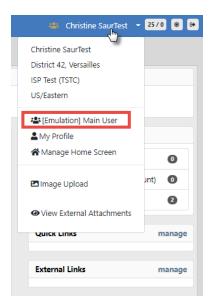
Notice that the name of the user you are emulating appears on the top right.

- 2. Navigate through Online RMS as if you were the user to locate the information you need.
- 3. To stop emulation, refer to "Stop Emulating User" below.

Stop Emulating User

Whichever method you use to emulate a user, the same process stops emulation.

1. To stop emulating the user, click on the **user's name**, then select **[Emulation] Main User** from the drop-down list.



 Your own Home Page appears and your name displays on the top right of the window.

Christine Saur [District 42, Versailles]	-	25/0	۲	•	

Add a User

Use the following procedure to add one user record.

Note: For instructions on adding multiple user records at once, refer to "Add Mass Users" on page 126.

- 1. Access the *Manage Users* page. For details, refer to "Manage Users" on page 93.
- 2. Click the Add User button to open the Add User page.

Manage Users		
		Go Back Add User Mass User Entry
User Accounts Log	A	Add a New User 🦟
Manage Users / Add User		
		Go Back Save
User Information		
This is a Caliber RMS Admin User		
User ID	Password	Confirm Password
First Name	MIDDLE NAME	Last Name
Agency	E-MAIL	TELEPHONE
-Select-		
* 🔿 Sworn 🔿 Not Sworn	Agency Administrator	
Sex	Race	SUBSCRIPTION LEVEL
-Select- 🗸	-Select-	✓ -Select- ✓

Note: Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of **User Subscriptions**. If your agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional subscriptions, or deactivate an existing user account. For more information on **User Sub**scriptions, refer to "Agency Information Tab" on page 18 of the Agency Profile.

You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

- **Note**: When First Name, Last Name, Sex, and Race are entered, the app will check for duplicate Employee records matching these values. If any are found, a button will appear allowing you to select an Employee match to associate to the new user rather than create a new employee record. Similarly, when Sworn is selected and First Name and Last Name are entered, the same as above will occur for Officer matches.
- **Note**: Selecting an Employee record will add a field showing the Employee information and a button to de-select the record. Also, the Sex and Race fields will be disabled while an Employee is selected, as these fields now reflect an existing record's information (Sex and Race is stored solely in Employee records). Selecting an Officer record will also a field showing the Officer information and a de-select button will appear. The Detective, Supervisor, Title, Badge #, and CAD ID fields will be disabled while an Officer is selected to reflect the selected officer's information. Selecting Not Sworn after selecting an Officer match will clear the selected Officer and all Officer fields.
- 3. Check This is a Caliber RMS Admin User if the user is an admin user, otherwise leave it blank.
- 4. Complete the form with the appropriate information.
 - You must choose either **Sworn** or **Not Sworn**. The user is automatically assigned roles to fit these needs.
 - Check the **Agency Administrator** box if applicable.
- 5. Click Save to save your entries to this tab.

Note: The system automatically creates an employee record.

6. The User Details page opens. Enter the necessary information in the applicable sections.

For more information on the User Details page and applicable sections, refer to "User Details" on page 97.

Add Mass Users

Use the following procedure to add multiple user records at once.

Note: For instructions on adding one user record, refer to "Add a User" on page 124.

- 1. Access the Manage Users page. For details, refer to "Manage Users" on page 93.
- 2. Click the Mass User Entry button to open the Mass User Entry page.

Manage Users							
User Accounts Log				Add M	Go Back Add Use		
Manage Users / Mass User E	ntry						
Click the add user link to insert another user Add Another User NEW USER	This is a Caliber RMS Admin Us User ID csaur	er	Password		Go Back Save		
	First Name		Middle Name		Last Name		
	AGENCY -Select-	~	E-Mail		Telephone		
	* O Sworn O Not Sworn Sex -Select-	~	Agency Administrator RACE -Select-	~	SUBSCRIPTION LEVEL	~	

Note: Agency administrators can easily track end-user subscriptions by monitoring the allocation and usage of **User Subscriptions**. If your agency's user subscription allowed limit has been reached, you receive a warning stating the maximum number has been reached and to contact support to add additional subscriptions, or deactivate an existing user account. For more information on **User Subscriptions**, refer to "Agency Information Tab" on page 18 of the Agency Profile.

You have reached the maximum number of active named user accounts for your Organization. Please contact support to add additional user accounts or deactivate an existing user account.

Note: When First Name, Last Name, Sex, and Race are entered, the app will check for duplicate Employee records matching these values. If any are found, a button will appear allowing you to select an Employee match to associate to the new user rather, than create a new employee record. Similarly, when Sworn is selected and First Name Caliber Public Safety

and Last Name are entered, the same as above will occur for Officer matches.

- **Note**: Selecting an Employee record will add a field showing the Employee information and a button to de-select the record. Also, the Sex and Race fields will be disabled while an Employee is selected, as these fields now reflect an existing record's information (Sex and Race is stored solely in Employee records). Selecting an Officer record will also a field showing the Officer information and a de-select button will appear. The Detective, Supervisor, Title, Badge #, and CAD ID fields will be disabled while an Officer is selected to reflect the selected officer's information. Selecting Not Sworn after selecting an Officer match will clear the selected Officer and all Officer fields.
- **Note**: Attempting to save a user add when a user has potential Employee/Officer matches, but for whom a match has not been selected, will display a dialog asking you if you wish to continue making new records despite matches to existing records. If multiple user records select the same Employee/Officer record, a validation error will occur.
- 3. Check This is a Caliber RMS Admin User if an admin user, otherwise leave it blank.
- 4. Complete the form with the appropriate information.
 - You must choose either Sworn or Not Sworn.
 - When you enter the person's first and last name, the NEW USER name on the left changes to the first and last name as shown below.

Manage Users / Mass User E	
Click the add user link to insert another user	
Add Another User Image: New User	
Click the add user link to insert another user	This is a Caliber RMS Admin User
Add Another User	User ID
Christine SaurTest	csaurTest
	First Name
	Christine

5. Click the Add Another User to display another set of user fields. Notice that NEW USER displays on the left until you enter the first and last name.

Manage Users / Mass User E	ntry				
Click the add user link to insert					Go Back Save
another user	This is a Caliber RMS Admin User				
Add Another User	User ID		Password		Confirm Password
 Christine SaurTes NEW USER 	csaurTest				•••••
-	First Name		MIDDLE NAME		Last Name
\	Christine				SaurTest
	Agency		E-MAIL		TELEPHONE
\ \	District 42, Versailles	~	ccsaur1@gmail.com		5551112222
\	* O Sworn Not Sworn		 Agency Administrator Organization Administrator 		
\ \	Sex		RACE		SUBSCRIPTION LEVEL
	Female	~	White	~	Full Time (987 Remaining) 🗸 🗸
	This is a Caliber RMS Admin User				
	User ID		Password		CONFIRM PASSWORD
	First Name		MIDDLE NAME		Last Name
	Agency		E-MAIL		TELEPHONE
	-Select-	~			
	* O Sworn O Not Sworn		Agency Administrator		
	Sex		RACE		SUBSCRIPTION LEVEL
	-Select-	~	-Select-	~	-Select- 🗸

- 6. Repeat steps 3 and 4.
- 7. Repeat steps 5 and 6 until all the new users have been entered.
- 8. Click Save to save all new entries.
- 9. Click Go Back to return to the Manage Users page.
- **10.** On the *Manage Users* page, search for the newly added records to update the roles, preferences, subscriptions.

For more information on searching and updating, refer to "Manage Users" on page 93.

Chapter 8. Personnel Management

The **Personnel Management** module provides the ability to manage employee information, regardless of whether employees have an Online RMS account.

Administrators with the appropriate permissions can add personnel to an agency or schema. **Personnel Management** is included in release 10.30 and above as a standard feature.

- Master Employee records cannot be deleted, only disabled (made inactive).
- An employee name can only be used once within one database.
- Master Employee records can be archived (saved) before applying updates.
- Three new permission categories for managing personnel are available to assign to roles:
 - Schema/System Level
 - Organization/Multi-tier Agency Level
 - Agency Level

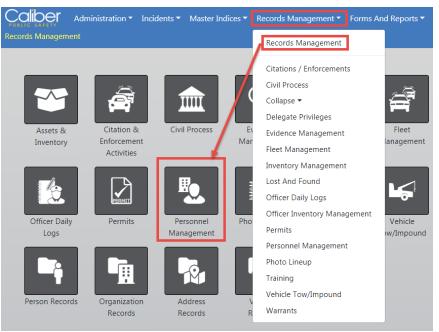
Note: The new permission categories are assigned to the *System_Admin*, *Organization_Admin*, and *Agency_Admin* roles, respectively, for the initial 10.30 release.

This module also provides a method of tracking training and certifications of employees, providing the **Training Module** is activated for your agency. For more information about the **Training Module** refer to "Training Module" on page 151. Training

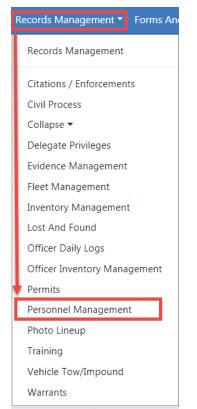
Access Personnel Management

Click the **Records Management** option on the top navigation bar, then click Records Management on the menu that appears to display the *Records Management* page. Click the **Personnel Management** icon to open the *Employee Search* page. Alternatively, select **Personnel Management** from the **Records Management** drop down menu.

Option 1



Option 2



Enter your search criteria in the *Employee Search* page to display a list of employees, or click the **Add Employee** to add a new employee.

See "Employee Search" below and "Add an Employee" on the next page for instructions on searching and adding employees, respectively.

Employee Search

Use the following procedure to search for specific employee records.

- 1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 129, if needed.)
- 2. Enter the search criteria on the *Employee Search* page. Enter data into as many fields as you would like. The more information you enter, the shorter the search results, or leave all fields blank to return a list of all employees.

Calber				⊖ Go	Back Search
Records Management / Employ	ee Search				
Employee Search				(Add Employee
ACTIVE STATUS		User Name		Agency	
Active	•			All Agencies	• #
LAST NAME		FIRST NAME		MIDDLE NAME	
SUFFIX		Maiden Name		TITLE	
				-Select-	•
SEX		RACE		ETHNICITY	
-Select-	•	-Select-	•	-Select-	•
SSN		DOB		PLACE OF BIRTH	
			#		
EMPLOYEE ID		EMPLOYEE TYPE		EMPLOYEE LEVEL	
		-Select-	•	-Select-	•
HAND DOMINANCE		BARGAINING UNIT		BLOOD TYPE	
-Select-	•			-Select-	•
LONGEVITY DATE FROM		LONGEVITY DATE TO		IS SYSTEM USER	
	曲		曲	Yes No	
HIRE DATE FROM		HIRE DATE TO			
	苗		苗		
END DATE FROM		END DATE TO			
	曲		曲		
Additional Search Criteria					
-Select-	Ŧ				
		Go Back Reset Search			
		So back Reset Search			

Additional search criteria is included in Online RMS 10.31 and above. Click on **Addi-tional Criteria** and choose *Course* or *Certifications* from the list.

ADDITIONAL SEARCH CRITERIA	
-Select- Courses Certifications	

- **Note**: Leave the **Is System User** Yes and No options **blank** to return a list of employees that match the search criteria, regardless of whether or not they are Online RMS users. Click **Yes** to return a list of employees that *are* only Online RMS users. Click **No** to return a list of only employees that *are not* Online RMS users.
- 3. Click the **Search** button at the bottom of the page to display the *Employee Search Results*, or click the **Reset** button to remove the entered criteria to start the search over.

Users with proper permissions can edit employee records, export the search results to a file, or view basic employee information from the *Employee Search Results* page.

Employee Search Results Example

Records Mai	nagement /	Employee Sea	arch / Employe	e Search Results			
		sults to a	file		Refine Search		Add Employee
Last ⊥↑ Name	First ⊥† Name	Middle ⊥î Name	Employee ⊥† ID	Employee ⊥† Type	User ID ⊥†	Agency ⊥î	Actions
Clark	Christine			Communications Personnel		District 42, Versailles	
Wright2	Frank2	Llyod2 Click nan	555 ne to view	Patrol Sworn basic informa	OFFICER_45	District 42, Versailles	Edit
EMPLOYEE	NEW			Juvenile Home		District 42, Versailles	ď

Click on the **Refine Search** button to update your criteria, or click either **New Search** to discard your current search and start a new one.

Refer to the OnlineRMSUser Guide for instructions on exporting search results to a file.

Refer to "Manage an Employee" on page 136 for instructions on editing employee records.

Add an Employee

Use the following procedure to add an employee record.

- 1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 129, if needed.)
- 2. Click the Add Employee button on the top right of the Employee Search page to open the Employee page.

Records Management /	Employee Search			
Employee Search				Add Employe
ACTIVE STATUS		User Name	Agency	
Active	T		All Agencies	• a
Last Name		FIRST NAME	MIDDLE NAME	

					Go Back
ACTIVE STATUS		AGENCY			
-Select-	~	District 42, Versailles	~		
LAST NAME		FIRST NAME		MIDDLE NAME	
SUFFIX		MAIDEN NAME		TITLE	
				-Select-	~
SEX		RACE		ETHNICITY	
-Select-	~	-Select-	~	-Select-	~
SSN		DOB		PLACE OF BIRTH	
			曲		
EMPLOYEE ID		EMPLOYEE TYPE		EMPLOYEE LEVEL	
		-Select-	~	-Select-	~
HAND DOMINANCE		BARGAINING UNIT		BLOOD TYPE	
-Select-	~			-Select-	~
LONGEVITY DATE		HIRE DATE		END DATE	
	曲		曲		曲
		Go Back Save			

3. Enter the applicable information in the fields provided.

					Go Back
ACTIVE STATUS		AGENCY			
Active	~	District 42, Versailles	~		
LAST NAME		FIRST NAME		MIDDLE NAME	
SUFFIX		MAIDEN NAME		TITLE	
				-Select-	~
SEX		RACE		ETHNICITY	
Female	~	-Select-	~	-Select-	~
SSN		DOB		PLACE OF BIRTH	
***-**-1214			曲		
EMPLOYEE ID		EMPLOYEE TYPE		EMPLOYEE LEVEL	
		Communications Personnel	~	-Select-	~
HAND DOMINANCE		BARGAINING UNIT		BLOOD TYPE	
-Select-	~			-Select-	~
LONGEVITY DATE		HIRE DATE		END DATE	
	曲		曲		曲
		Go Back Save			

- All but the last four digits of the entered SSN is masked with asterisks for privacy purposes.
- 4. Click Save to display additional data options.

Lengloyee Info					
		Active Status		Agency	
		Active	~	District 42, Versailles	~
		User			
			Associate User		
LAST NAME		First Name		MIDDLE NAME	
ElmoreTest2		PhilTest2			
Suffix		Maiden Name		TITLE	
				-Select-	~
Sex		RACE		Етнистту	
Male	~	-Select-	~	-Select-	~
SSN		DOB		PLACE OF BIRTH	
			曲		
EMPLOYEE ID		Employee Type		EMPLOYEE LEVEL	
	_	Patrol Sworn	~	-Select-	~
HAND DOMINANCE	~	Bargaining Unit		Select-	~
-Select-	Ť	Hire Date		END DATE	· ·
LUNGEVITT DATE	曲		曲	LND DATE	É
-					
			Save		
Employee History					0
Service History				0	Add Service History
Service History				0	Add Service History Add Education
Service History Education				0	Add Service History Add Education Add Language
Service History				0	Add Service History Add Education
Service History Education					Add Service History Add Education Add Language
Service History Education UD Languages Skills					Add Service History Add Education Add Language Add Skill
Service History Education ULanguages Skills Classifications					Add Service History Add Education Add Language Add Language Add Skill Add Classification
Service History Education Languages Skills Classifications Affiliations					Add Service History Add Education Add Language Add Skill Add Classification Add Affiliation
Service History Education Languages Skills Affiliations Addresses					Add Service History Add Education Add Language Add Language Add Classification Add Classification Add Affiliation Add Affiliation Add Address
Service History Education Stanguages Skills Classifications Affiliations Addresses Employee Contacts				•	Add Service History Add Education Add Language Add Language Add Classification Add Address Add Address Add Address Add Contact
Service History Education Languages Skills Affiliations Addresses Employee Contacts Phone Numbers				•	Add Service History Add Education Add Language Add Language Add Classification Add Classification Add Affiliation Add Address Add Address Add Phone Number
Service History Education Stills Classifications Addresses Employee Contacts Phone Numbers Medical Info				•	Add Service History Add Education Add Education Add Language Add Classification Add Classification Add Affiliation Add Affiliation Add Address Add Phone Number Add Medical Info
Service History Education Languages Skills Addresses Employee Contacts Medical Info Other Info				•	Add Service History Add Education Add Language Add Language Add Classification Add Add Affiliation Add Address Add Address Add Address Add Phone Number Add Phone Number Add Info
Service History Education UI Languages Skills Classifications Affiliations Addresses Employee Contacts Phone Numbers Medical Info Other Info Groups				C C Add	Add Service History Add Education Add Language Add Language Add Classification Add Add Skill Add Classification Add Affiliation Add Address Add Phone Number Add Phone Number Add Info Add Info Employee to Group

Note: The **Employee Info** data is shared with the *User Module* in instances when the employee has a corresponding Online RMS user record.

Additional Data

This area is used to capture other employee data such as, Service History, Education, Languages, Addresses, etc. You can also attach documents or photos, and add a picture of the employee.

Click on an individual link, complete the entry form that appears, then click **Save**. The entry form is varies by individual link.

Example:

- a. Click on the Add Education link to display the Education entry form.
- b. Enter the appropriate data and click Save.

Education	×
Түре	
Bachelor of Arts	~
DATE OF INFO	
03/20/2019	曲
COMMENTS	
	Cancel Save

c. The saved data displays in the **Education** grid.

tæ Education			Add Education
Education	Comments	Date Of Info	Actions
Bachelor of Arts		02/26/2019	2

Note: The Service History data is shared with the Officer Daily Log.

5. Optionally click on the *Training* tab to register the employee for training. For details refer to "Manage an Employee" below.

Manage an Employee

You can update an existing employee record, and with proper permissions, you can delete certain existing details of that employee such as, Education, Skills, Phone Numbers, etc.

If the employee is also an Online RMS user, a **Manage User** button appears on the *Employee* page for easy access to the user record.

If your agency is using the **Training Module**, and you have proper permissions, you can also track training and certifications for the employee.

Update Existing Employee Record

Use the following procedure to update an employee record.

- 1. Access the *Personnel Management* page. (See "Access Personnel Management" on page 129, if needed.)
- 2. Search for the employee record you need to update. (See "Employee Search" on page 131, if needed.)
- 3. Click in the Actions column to the far right of the user record to display the *Employee* page. There are two tabs: *Employee* Info and *Training*. The *Employee* Info tab opens by default.

ast 1	î First ↓î	Middle 1	Employee ↓↑	Employee Type 💷	User ID		Agency	11 Actions
ame	Name	Name	ID				, geney	
ark	Christine			Communications			District 42,	
				Personnel			Versailles	
Calib	or							_
		/ee Search Resu	ılts / Edit Employ					
							Man	age User Go B
鬼 Employ	yee Info 🔅 T	raining						
			ACTIVE ST	ATUS		User		
			Active		~	WPERKIN	5 Ur	n-Associate Use
			Agency			OFFICER ID		
			District	42, Versailles		322		
LAST NAM	IE		FIRST NA	ME		MIDDLE NA	ME	
PERKINS	5		WENDY					
SUFFIX			MAIDEN I	NAME		TITLE		
						-Select-		
Sex			RACE			Етнистт		
Female			✓ White		~	-Select-		
SSN			DOB			PLACE OF B	IRTH	
					曲			
Employee	ID		Employer	Түре		EMPLOYEE L	EVEL	
			Patrol	Sworn	~	-Select-		
HAND DO	MINANCE		BARGAINI	ng Unit		BLOOD TYPE	E	
-Select-			~			-Select-		
Longevit	Υ DATE		HIRE DAT	E		END DATE		
			曲		曲			đ

- 4. To add an employee picture, page down while on the *Employee Info* tab then click the **Add Attachment** link, upload the photo, then choose **Employee Photo** as the image type.
- 5. Make other changes as needed on the *Employee Info* tab. Refer to "Add an Employee" on page 132 for instructions on adding additional data options.
 - Note: The Associate/Un-Associate User button appears as either Associate User or Un-Associate User depending on whether there is an existing user ID associated with the employee. Click the **Associate User** button to find potential matches to Online RMS user IDs based on First Name and Last Name. Click the **Un-Associate User** button to de-link an employee from a user ID.

Employee Search / Employee Search R	esults / Edit Employee			
Employee Info				Manage User Go Back
	Active Status	~	User WPERKINS	Un-Associate User
	Agency District 42, Versailles		OFFICER ID 322	1
LAST NAME	First Name		Middle Name	

6. If applicable, click on the *Training* tab to manage **Courses**, **Certifications**, and view **Eligible Ranks** for the employee.

Courses						¢	Advanced Search OQuic	k Add Course 🔓
Name	Course Type	Description	Score	Pass/Fail	Start Date	Completed Date	Days Until Expiration	Actions
Basic Training 100		0					N/A	6

If the employee is also an Online RMS user, you can click on the Manage User button to manage the user account.

To view the course catalog, click the **Course Catalog** icon 4.

Courses

a. Click Quick Add Course to add a course to the employee record, then click Add Details to add attachments, or click Save to add the course to the employee record without attachments. For more information on attachments, refer to "Attachments" on page 11.

Course	×
Course	
-Select-	~
Соят	
Score	
Pass/Fail	
-Select-	~
ON DUTY	
-Select-	~
COMPLETED DATE	
	#
	Cancel Add Details Save

b. Optionally, click **Advanced Search** link to search for and select an existing course. Enter search criteria then click **Search** to display the *Course Search Results*.

						Go Back	Add Course
NAME	A	GENCY		COURSE TYPE		COURSE CLASSIFICA	TION
		All Agencies	∽ ≞	-Select-	~	-Select-	~
COURSE ID	CA	ATALOG COURSE		INSTRUCTOR		LOCATION	
		-Select-	~				
START DATE FROM	ST	TART DATE TO		END DATE FROM		END DATE TO	
ŧ			#				#
ADDITIONAL SEARCH CRITERIA							
-Select-		~					
			Go Back Res	et Search			

Click the Hand icon to select the course.

							Re	ine Search	N	lew S	Search
🖹 🖹 🎦 🍫 29 result(s) fi	ound							Previous	1	2	Next
Course ↓↑	Location	↓î	# Attendees 🕸	Start Date 🛛 🕸	1	End Date 💷	Agency	Ļţ	Ac	tion	s
Advanced K-9 Training 201			0				Area Units-A	1	_	→	5

c. Click the **Edit** icon on the search results screen to open *Employee Course Information*. Make necessary changes then click **Save**.

To view the course catalog, click the Course Catalog icon 📥.

d. Click the **Delete** icon **to** delete a *Employee Course Information* record.

e. Click Yes to confirm delete or click No to exit without deleting.

Message From RMS	
Are You Sure?	
No Yes	

Certifications

a. Click the **Add Certification** link on the Edit Employee screen to add a Certification, then click **Save**.

Certificat	ion Level Click to view Certification
CERTIFICATION	Catalog
Tazer	~ ()
DATE OF INFO	Click to view details
02/26/2019	曲
	Cancel Save

- b. Click the **Delete** icon in the Actions column to delete.
- c. Click **Yes** to confirm delete or click **No** to exit without deleting.

Message From RMS
Are You Sure?
No Yes

Eligible Ranks

- a. The *Eligible Ranks* section is view only. Data cannot be changed or deleted from this section.
- 7. Click Update or Save (Save and Archive).

Update

This option updates the current *Master Employee* record. Select this option if you want to overwrite the *Master Employee* record without arching (saving) a copy prior to the update.

Save

This option creates a new *Master Employee* record with your changes, and archives (saves) a copy of the master record before the update. *Archived* data is an accumulation of historical information that can be viewed later. Archived data is not changeable; it is meant to be a snapshot in time.

For example, if you add Kris LeClaire's middle name to her *Master Employee* record and click **Save**, then a new *Master Employee* record is created containing the middle name, and the record without the middle name is saved (archived) for later viewing under the *Employee History* grid of the *Employee* page.

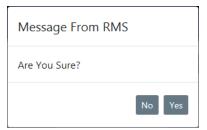
Delete Additional Options

You can delete existing Additional Options (details) with the proper permissions.

1. Click the Delete icon and under to the Actions column to delete.

🕿 Education			Add Education
Education	Comments	Date Of Info	Actions
GED Certification	0	02/28/2018	2
Certification	0	12/02/2017	2

2. Click Yes to confirm, or No to return to the Employee page without deleting.



If you chose to click **Yes**, then the *Additional Option* record is permanently removed and cannot be retrieved or viewed later.

Note: Additional Options are not Archived (saved).

Navigate to the User Record

If the employee is also an Online RMS user, a **Manage User** button appears on the *Employee* page for easy access to the user record, otherwise the button does not appear.

			Manage User Go Bac
Employee Info	Training		
ACTIVE STATUS			
Active	~		
USER		AGENCY	
OFFICER_45		District 42, Versailles	
LAST NAME		FIRST NAME	MIDDLE NAME
Wright2		Frank2	Llyod2

See "Manage Users" on page 93 for details on updating the user record.

Chapter 9. Criminal Complaint

The Criminal Complaint module is for managing criminal complaints against arrestees and offenders, and approve or disapprove through a guided review process before submitting it to the state.

To utilize this module, it must be turned on for the agency.

Court Cases can be associated with Criminal Complaints.

Two Approval Levels

The agency has the option to utilize a 1 or 2 level approval for Criminal Complaints. Level 1 is the default.

Level 1

The creator of the complaint sends it to the supervisor for approval.

The supervisor can disapprove and send the complaint back to the creator.

The supervisor approves and submits the complaint data to the court in one action, or approves then submits later.

Level 2

The creator of the complaint sends it to the supervisor for approval.

The supervisor can disapprove and send the complaint back to the creator.

The supervisor approves the complaint.

The court officer can disapprove an approved complaint and send the complaint back to the creator.

The court officer submits the approved complaint data to the court.

Level 1 is the default setting. Your agency administrator can elect to turn on the 2-Level Approval Process using the **Maint Value** settings under the Administration menu.

Turn on Criminal Complaint Approval Level 2

With appropriate permissions, you can turn on 2-Level Approval for your agency using **Maint Value** settings:

- 1. Access the **Maint Value** table. For instructions, refer to "Access Maintenance Values" on page 346.
- 2. In the Search field, type **complaint_2** to display the record.

Show 10 🗢 entries				Searc	h: c	omplain	t_2		×
Keyword †1	Value 11	Description 11			End Dat		Actio	ns	
COMPLAINT_2_LEVEL_APPROVAL	N	Enable 2 level approval for criminal complaints	(07/07/2020					ľ
Showing 1 to 1 of 1 entries (filtered	from 263	total entries)				Prev	vious	1	Next

3. Click the edit icon to open the Edit Maintenance Value dialog.

Edit Maintenance Value						
Application	Module					
E*Justice	E*Core					
EFFECTIVE DATE	Keyword					
07/07/2020	COMPLAINT_2_LEVEL_APPROVA					
VALUE						
N						
	Cancel					

- 4. Change Value from N to Y.
- 5. Click **OK**.

Configurations

Permissions

The following permissions are available:

- Criminal Complaint Add and Edit
- Criminal Complaint Delete

- Criminal Complaint Vlew
- Criminal Complaint Review
- Criminal Complaint Always Edit

New Number Generation Types

- New Number Generation Type for **Criminal Complaint**
- New Number Generation Type for Offender Base Tracking Number
 - Offender / Arrest Tracking Number Arrest (for an arrest complaint).
 - Offender / Arrest Tracking Number Complaint (for on a stand-alone complaint).

EJS_CODES

- Criminal Complaint Type = CRIM_CMPLNT_TYPE_CODES
 - Out of the box values: Arrest, Hearing, Summons, Warrant
- Criminal Type of Hearing = CC_HEARING_TYPE_CODES
 - Out of the box values: Without Notice, Accused Not Arrested
- Criminal Threat Type = CC_THREAT_TYPE_CODES
 - Out of the box values: Bodily Injury, Commission of a Crime, Flight Risk
- Complaint Charge Type = CRIM_CPLT_CHARGE_TYPE_CODES
 - Out of the box values: One or More Felonies, Only Misdemeanors

Notification Types

- Criminal Complaint Approval Request
- Criminal Complaint Disapproved

• Criminal Complaint Ready to be Submitted

Recent Activities - Show Complaints Submitted in Set Number of Days

Complaints Submitted within a past number of defined days appear under *Recent Activities* on your home page. Follow the steps below to set the number of days.

- 1. Access the **Maint Value** table. For instructions, refer to "Access Maintenance Values" on page 346.
- 2. In the Search field, type crim_comp to display the record.

Show 10 💠 entries	crim_comp ×						
Keyword 1	Value 🔃	Description 11	Effective 11 Date	End 11 Date	Actions		
CRIM_COMP_SUBMIT_DAYS	10	Used for recent activities, complaints submitted in XX days.	08/19/2020		ď		
Showing 1 to 1 of 1 entries (fi	howing 1 to 1 of 1 entries (filtered from 267 total entries)						

3. Click the edit icon to open the *Edit Maintenance Value* dialog.

Application	MODULE
E*Justice	E*Core
EFFECTIVE DATE	Keyword
08/19/2020	CRIM_COMP_SUBMIT_DAYS
VALUE	
10	

- 4. Enter the number of days in the Value field.
- 5. Click OK.

Create Criminal Complaint from Arrest

With appropriate permissions, you can turn on the setting to allow users to create criminal complaints from the Arrests using **Maint Value** settings:

- 1. Access the **Maint Value** table. For instructions, refer to "Access Maintenance Values" on page 346.
- 2. In the Search field, type complaint_create to display the record.

Show 10 🗢 entries						Se	earch:	compla	int_create	×
Keyword	ţ1	Value	11	Description	îl.	Effective Date 11	End	Date 🕆	Actions	
COMPLAINT_CREATE_FROM_ARREST		Y		Create Criminal Complaint from Arrest		08/26/2020				Ľ
Showing 1 to 1 of 1 entries (filtered from 267 total entries) Previous 1								I Next		

3. Click the edit icon to open the Edit Maintenance Value dialog.

Application	MODULE
E*Justice	E*Core
EFFECTIVE DATE	Keyword
08/26/2020	COMPLAINT_CREATE_FROM_ARI
VALUE	
Y	

- 4. Enter the Y for allow and N for disallow in the Value field.
- 5. Click OK.

Chapter 10.Court Cases

The Court Case module allows users to create and manage court cases against arrestees and offenders.

To utilize this module, it must be turned on for the agency.

Court Cases can be associated with Criminal Complaints.

Configurations

Permissions

The following permissions are available:

- Court Case Add and Edit
- Court Case Delete
- Court Case Vlew
- Court Case Always Edit
- Manage Court Appearances

E.S_CODES

- Appearance Type = COURT_APP_CODES
- Appearance Reason = COURT_APP_REASON_CODES
- Appearance Status = COURT_APP_STATUS_CODES
 - Values: Active, Closed, Dismissed, CWOF, Guilty, Not Guilty

- Court Case Reference Number Type
- Court Case Status = COURT_CASE_STATUS_CODES
 - Values: Filed, Active, Denied, Closed

Notification Types

- COURT APPEARANCE ASSIGNED
- COURT APPEARANCE UPDATED
- COURT APPEARANCE CANCELLED

Chapter 11. Training Module

The **Training Module** provides administrators with proper permissions the ability to configure Training Courses and Certifications.

The **Training Module** is available with full subscription access to Caliber Online RMS 10.31 and higher. The Training Module is disabled by default but can be enabled, and additional user training is available for purchase. Contact Caliber Public Safety Support for more information.

Agency administrators have the ability to configure this module specific to your agency's needs, such as an eligible list of course types (i.e., gun safety, mobile training, etc.), classification levels, and other configuration settings as described later in this chapter.

There are two components to the Training Module:

- Courses
 - Courses are training classes with specific focus to refine skills (i.e., Online RMS training).
 - Configure courses by way of the Administration menu.
 - There are two components to Courses:

Template

A Course Template is a standard form that is used as a starting point when creating Course Instances. For example, users with proper permissions can create a Template that is pre-populated with a standard class description, prerequisites, and attached documents such as a class outline or handouts, that pull into a newly created Course Instance automatically.

Note: Templates are managed only through the *Administration* menu. For more information on managing Templates refer to "Manage Course Configurations" on page 155.

Course Instance

A specific course to which employees can be assigned. There could be multiple records of the same course, but with different dates or other information.

Note: Course Instances are managed through the *Training* option under the *Records Management* menu. For more information on Course Instances, refer to the *Caliber Online RMS User Guide*

- Certifications
 - Proof of achieving specific skills or knowledge level that are mandatory for specific job duties (i.e., gun safety certification).
 - Create and maintain certifications by way of the *Training* option under the *Records Management* menu.

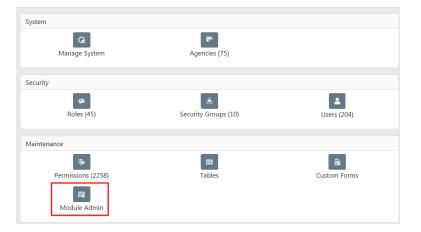
Note: Certifications are managed through the *Training* option under the *Records Management* menu.

There are three new permissions categories beginning with the Online RMS 10.31 release:

- Training Schema Level Management (System Level)
- Training Organization Level Management (Multi-tier Agency Level)
- Training Agency Level Management
 - **Note**: The new permission categories are assigned to the *System_Admin*, *Organization_Admin*, and *Agency_Admin* roles, respectively, for the initial 10.31 release.

Access Course Configuration

1. Click the **Administration** icon on the top navigation bar, then click again on Administration from the drop-down menu to open the *Administration Home* page. Then click on the **Module Admin** link to display the *Module Configuration* page.



	Go Bac
Incident Rules	Configure Incident rules for agency: Select Agency-
Incident Rules	Configure Incident rules for your agency District 42, Versailles
Field Arrests	Configure Field Arrests for product and agency settings.
Field Arrests	Configure Field Arrests For Your Agency Indiana State Police
Officer Daily Logs	Configure Officer Daily Logs for any agency.
Maps Administration	Configure Maps
Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency District 42, Versailles
Lost & Found Locations	Configure Lost & Found Locations For Your Agency District 42, Versailles
Lost & Found Locations	Configure Lost & Found Locations for agency: -Select Agency-
Evidence Labels	Configure Evidence Labels Across Agencies
Evidence Labels	Configure Evidence Labels For Your Agency District 42, Versailles
Warrants	Configure Warrants
Photo Lineups	Configure Photo Lineups
Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

2. Click on the **Training** link on the *Module Configuration* page to display the *Training Administration* page.

ning Administra	ation					Go
Course Templates	Maintenance Settings	Course Types	Course Classifications	Four	tabs	
						Add Course Template
Name			Description	Prerequisites	Active	Actions
ANG Test					Yes	2
Advanced K-9 Trai	ning 201			0	Yes	2
Agency Startup					Yes	6
Andy Test					Yes	2
Basic Training 100			0		Yes	e i
Basic Training 102			0	0	Yes	2
Bookkeeping					Yes	e i
Dana Course			0		Yes	2
EMP TEST					Yes	2
Employee Training					Yes	2
Firearms Training			0	0	Yes	2
Gun Safety			0		Yes	e i
Gun Safety 101			0	0	Yes	2
Intermediate Traini	ing			0	No	2
K-9 Training 101					Yes	2
MY TEMPLATE					Yes	e i

The Training Administration page contains a Product Config tab with four sub-tabs:

- Course Templates
- Maintenance Settings
- Course Types
- Course Classifications

Configure Courses

The *Course Templates*, *Course Types*, and *Course Classifications* tabs are empty by default until configured by your agency administrator to meet your agency's needs. For details on how to configure courses, refer to "Manage Course Configurations" on the facing page.

Number of Days Nearing Expiration

The *Maintenance Settings* tab contains a list of Courses and Certifications that are due to expire within a specified number of days. For details on how to configure the number of days nearing expiration, refer to "Maintenance Settings" on page 162.

Manage Course Configurations

There are four configurations associated with a Course:

- Course Types
- Course Classifications
- Course Template
- Number of days to notify users before Courses and Certifications are due to expire.

Note: The *Training Course Dashboard* and *Training Certification Dashboard* displays a list of Courses and Certifications that are due to expire within a specified number of days. For more information on the Training Dashboard refer to the *Training Module* section of the *Caliber Public Safety Online RMS User Guide*.

It is best practice to configure the courses in the order listed, as *Course Types* and *Course Cassifications* must exist before assigning them to a *Course Template*. For more information on associating a Course Type and Course Classification with a Course Template refer to <u>#CourseTemplates</u>.

Course Types

Add Course Type

- 1. Click on the **Course Types** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 152.
- 2. Click the Add Course Type button to open the Course Type Code window.

Course Templates	Maintenance Settings	Course Types	Course Classifications		
Code	1	Description		Active	Actions
ADVANCED		Advanced Trainir	ıg	Yes	e
BASIC		Basic Training		Yes	2
ELITE		Elite Training 2		No	6
INTERMEDIATE	1	Intermediate Trai	ning	Yes	2

3. Enter the **Code** and **Description**. Leave the **Active** box checked if you want this code to appear within the available code list, otherwise uncheck it.

Note: The **Code** and **Description** fields are required.

Course Type Code	
CODE	
DESCRIPTION	
Active	
	Close Save

4. Click **Save** to create the *Course Type Code*, or click **Close** to return to *Training Admin-istration* without saving the new code.

Update Course Type

- 1. Click the Edit icon in the Action column on the *Course Type* you want to update.
- 2. Make the necessary changes then click **Save**, or click **Close** to return to Training Administration without saving your changes.

Course Type Code		
CODE		
DESCRIPTION		
Active		
\checkmark		
	Close	Save

Delete Course Type

- 1. Click the Delete icon in the Action column on the *Course Type* you want to delete.
- 2. Click Yes to confirm delete, or click No to return the *Course Type* sub-tab without deleting.

Message From RMS
Are You Sure?
No Yes

a. If the *Course Type* is associated with a *Course Template* a message appears at the top of the screen stating it cannot be deleted. For more information on associating a Course Type with a Course Template refer to <u>#CourseTemplates</u>.

Course Classifications

Add Course Classification

- 1. Click on the **Course Classification** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 152.
- 2. Click the Add Course Classification button to open the Course Classification Code window.

				Go
Maintenance Settings	Course Types	Course Classifications		
Descri	ption		Active	Actions
Classifi	ication 1		Yes	2
Classifi	ication 2		Yes	2
Classifi	ication 3		No	2
	Descri Classifi Classifi		Maintenance Settings Course Types Course Classifications Description Classification 1 Classification 2	Maintenance Settings Course Types Course Classifications Description Active Classification 1 Yes Classification 2 Yes

3. Enter the **Code** and **Description**. Leave the **Active** box checked if you want this code to appear within the available code list, otherwise uncheck it.

Course Classification Code
CODE
CLASS1
DESCRIPTION
Classification 1
ACTIVE

Note: The Code and Description fields are required.

4. Click **Save** to create the *Course Classification Code*, or click **Close** to return to *Training Administration* without saving the new code.

Update Course Classification

- 1. Click the **Edit** icon in the Action column on the *Course Classification* you want to update.
- 2. Make the necessary changes then click **Save**, or click **Close** to return to Training Administration without saving your changes.

Course Classification Code	
CODE	
CLASS1	
DESCRIPTION	
Classification 1	
	Close Save

Delete Course Classification

- 1. Click the Delete icon in the Action column on the *Course Classification* you want to delete.
- Click Yes to confirm delete, or click No to return to the Course Classification sub-tab without deleting.

Message From RMS
Are You Sure?
No Yes

a. If the *Course Classification* is associated with a *Course Template*, a message appears at the top of the screen stating it cannot be deleted. For more information on associating a Course Classification with a Course Template refer to #CourseTemplates.

Course Templates

Add Template

- Click on the Course Templates sub-tab on the Training Administration page. For details on accessing the Training Administration page refer to "Access Course Configuration" on page 152.
- 2. Click the Add Course Template link. to open the Add Course Template window.

aining Administra	ation					Go Back
Course Templates	Maintenance Settings	Course Types	s Course Classif	fications		
					€	Add Course Template
Name			Description	Prerequisites	Active	Actions
ANG Test					Yes	e b
Advanced K-9 Trai	ning 201			0	Yes	2
Agency Startup					Yes	2

3. Enter the appropriate information in the fields provided then click **Save** to create the Course Template, or click **Back** to return to *Training Administration*.

Add Course Template			Go Back
NAME	Agency		
Gun Safety 101	District 42, Versailles	~	
COURSE TYPE	COURSE CLASSIFICATION		
-Select-	-Select-	~	
EXPIRATION DAYS	MINIMUM HOURS		PASSING SCORE
MAX ATTENDEES	MINIMUM ATTENDEES		TRAINING COST
EXTERNAL	ACTIVE		
	\checkmark		
DESCRIPTION			
EQUIPMENT			
COMMENTS			
	Save		

4. Optionally, page down to add Prerequisites and Attachments.

Prerequisites	Add Prerequisite
Attachments	• Add Attachment

5. Click Add Prerequisite to open the Course Prerequisite window.

Course Prerequis	site
COURSE	
Basic Training 100	~
	Cancel Save

a. Select the appropriate **Course** as the prerequisite then click **Save**, or click **Cancel** to return to *Edit Course Template* without saving the prerequisite.

- a. The added prerequisites appear in the *Prerequisites* section of the *Edit Course Template*.
- 6. Optionally click Add Attachment to add course documents such as an outline and handouts. For more information on attachments, refer to "Attachments" on page 11.

Update Template

- Click on the Course Templates tab on the Training Administration page. For details on accessing the Training Administration page refer to "Access Course Configuration" on page 152.
- 2. Locate the template you want to edit then click on the Edit icon in the Action column.
 - **Note**: A blue Information Bubble appears in the *Description* and *Prerequisites* columns when details have been entered into these fields. Hover over the bubble to view a portion of the data, or click on the blue bubble to view the entire entry.

aining Administra	ation						Go Ba
Course Templates	Maintenance Settings	Course Types	Course Classifications				
						🕂 Add Cor	urse Template
Name			Description	Prerequisites	Active		Actions
ANG Test	Click the infor	mation bubble	to view details		Yes		, C
Advanced K-9 Trai	ning 201			•0	Yes	Edit	2

- 3. Make the necessary changes then click the **Update** button. For details on the editing the Course Template refer to "Add Template" on page 159.
- 4. Click the **Back** button to return to the *Module Configuration* page.

Delete Template

- Click on the Course Templates sub-tab on the Training Administration page. For details on accessing the Training Administration page refer to "Access Course Configuration" on page 152.
- 2. Click the Delete icon <a>in the Action column on the Course Template you want to delete.
- 3. Click **Yes** to confirm delete, or click **No** to return to the *Course Templates* sub-tab without deleting.

Message From RMS
Are You Sure?
NoYes

a. If the *Course Template* is associated with a *Course Instance*, a message appears at the top of the screen stating it cannot be deleted. For more information on *Course Instances* refer to the *Caliber Public Safety Online RMS User Guide*.

Maintenance Settings

The *Training Administration* page contains a **Maintenance Settings** tab that contains a list of Courses and Certifications that are due to expire within a specified number of days. Users with appropriate permissions can set the number of days nearing expiration.

Set Number of Days Nearing Expiration

- 1. Click on the **Maintenance Settings** tab on the *Training Administration* page. For details on accessing the *Training Administration* page refer to "Access Course Configuration" on page 152.
- 2. Click on the Edit icon in the Actions column to edit the number of days.

Course Templates Maintenance Settings Course Types Cou	rse Classifications		
Keyword	Description	Value	Actions
TRAINING_CERTIFICATION_DASHBOARD_NEAR_EXPIRED_DAYS	Display Certifications that are going to expire this many days from today.	30	
TRAINING_COURSE_DASHBOARD_NEAR_EXPIRED_DAYS	Display Courses that are going to expire this many days from today.	30	Edit 🗹

3. Make the necessary updates in the *Maint Val* form, then click **Save** to apply your changes or click **Close** to cancel and return to the *Maintenance Setting*stab.

Maint Val	
Keyword	
TRAINING_CERTIFICATION_DASHBOARD_NEAR_EXPIRED_DAYS	
DESCRIPTION	
Display Certifications that are going to expire this many days from today.	
VALUE	
30	
	Close Save

Note: The same process applies to both the *Training Certification* and *Training Course* settings.

Chapter 12. Training Videos Module

Training Videos Overview

Beginning with Online RMS 11.4.0, agencies can enhance users' training and learning experience with the **Online Training** feature. The **Online Training** feature offers standard Caliber video-based learning to all users and, optionally, agency-specific videos. In addition, the agency administrator can enable a feature that pops up videos on a particular page, requiring users to watch the videos.

Video Rules and Requirements

- Agency must have the **Online Training** feature turned on and configured to get the pop up (required) videos. Contact Caliber Public Safety to turn on and configure this feature.
- Agency must enable this feature on the agency profile for users to have access to non-standard videos.
- No roles or permissions are associated with this feature; the Online Training feature controls access.
- Supports only MP4 files at this time.
- Contact Caliber Public Safety to upload videos.
- The agency administrator has the option to require user acknowledgment after viewing the video.
- The **date and time** watched by users are saved to the database on videos that **require acknowledgment**.

Benefits of Video-Based Learning

• A cost-effective training approach.

- Provides up-to-date training opportunities.
- Provides a Training Video Library where users can keep track of their videos.

Note: For more information on the **Training Video Library**, refer to the *Online RMS User Guide*.

- Provides the ability to watch videos more than once.
- Enforces required training.
- Provides a history of e-training participation.

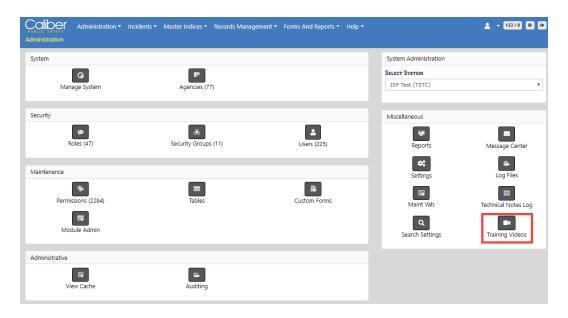
Access Training Videos

Follow these steps to access the Training Videos admin link:

1. Click on the **Administration** label on the top menu bar then click **Administration** again.



2. Click on Training Videos under Miscellaneous.



3. The Training Videos Administration grid appears.

aining Videos Administration								
now	10 🜩 entries					Search:		
Dî	Video URL 11	Page 1 Category	Application 1	l Sort 11 Order	Acknowledge Required	11 Description 11	Actions	
2	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_111.0_Introduction.mp4	Incidents	Data Submission	0	Yes	0	2	
3	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_111.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		2	
4	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_111.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		6	
5	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_111.0_Incident_Navigation.mp4	Incidents	Incidents Mapping	0	No		2	
5	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Approve- Disapprove.mp4			0	No	0	6	
	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Assign Incident- Supplement.mp4			0	No	0	6	
	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Charts.mp4			0	No	0	2	
9	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create a Supplement.mp4			0	No	0	6	
0	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create Incident Report.mp4			0	No	0	2	
1	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Delete.mp4			0	No	0	6	

Search Training Videos

Follow these steps to search Training Videos in Online RMS:

- 1. Access *Training Videos Administration*. For instructions, refer to "Access Training Videos" on page 166.
- 2. Click in the **Search** text box and enter a word or phrase to display results that match your entered text.

inir	g Videos Administration						Go Back Add V
now	10 + entries					Search:	
Dîl	Video URL	Page 1 Category	Application 1 Page	Sort Order	Acknowledge Required	11 Description 11	Actions
	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes	0	C i
	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		C i
	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Data Submission	0	Yes		ß
	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Incident_Navigation.mp4	Incidents	Incidents Mapping	0	No		2 (
	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Approve- Disapprove.mp4			0	No	0	2
	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Assign Incident- Supplement.mp4			0	No	0	8 (
	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Charts.mp4			0	No	0	2
	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create a Supplement.mp4			0	No	0	ß
0	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Create Incident Report.mp4			0	No	0	C I
1	https://www.public-safety-cloud.net/public/RMSTrainingVideos/Delete.mp4			0	No	0	2

rainin	g Videos Administration							Go Back Add Vid
Show	10 • entries						Search: data	>
ID↑:	Video URL		Page 11 Category	Application 11 Page		Acknowledge 1	Description 11	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Ir	ncidents	Data Submission	•	Yes	0	6
4	https://www.public-safety-cloud.net/public/interActRMS- WebHelp/RMS_11.0_Incident_Navigation.mp4	Ir	ncidents	Data Submission	0	Yes		6

Add Training Videos

Follow these steps to add Training Videos to Online RMS:

Note: Contact Caliber Public Safety for video uploads.

- 1. Access *Training Videos Administration*. For instructions, refer to "Access Training Videos" on page 166.
- 2. Optionally, search for specific training videos to ensure the video you want to add doesn't already exist. For instruction, refer to "Search Training Videos" on page 167.
- 3. Click on the Add Video button if the video does not already exist.

Admini	tration / Training Videos Admin						
rainin	g Videos Administration						Go Back Add Vid
Show 10 entries Search:							
ID↑I.	Vīdeo URL 11	Page 11 Category	Application 11 Page	Sort 11 Order	Acknowledge 11 Required	Description 1	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes	0	6
3	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		6

4. The Training Video dialog box appears.

Training Video	
ID	
Video URL	
VIDEO FILE TYPE	
.mp4 Video	T
Application Page	
-Select-	•
VIDEO DESCRIPTION	
Acknowledge Required	SORT ORDER
•	0
	Close Save

5. Complete the following fields in the dialog box:

ID

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the **Save** button.

Video URL

The URL to the video file. Contact Caliber Public Safety to add videos.

Video File Type

Online RMS supports only MP4 files at this time.

Application Page

Select the appropriate **Application Page** from the drop-down list provided.

Application Page

Data Submission
-Select- Administration Agencies Administration Landing Administration Users
Data Submission
Forms and Reports Home Page Incident Names Incident Narratives Incident Offenses Incidents Approval Incidents Create Incidents Header Incidents Landing Incidents Mapping Incidents SmartSearch Incidents Status Incidents Summary
Master Indexes

Video Description

Enter a description for the video.

Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop up automatically each time users log into Online RMS and access a page to which the video is associated until they acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

Sort Order

The Sort Order defaults to 0. The Sort Order is used if you have multiple videos that you want to appear on the same page in a particular order.

For example:

If you want two videos to show on the Home Page, you associate each video to the Home Page, then assign a Sort Order to each video: Video 1 could be Sort Order = 0 and Video 2 could be Sort Order = 1.

If the Sort Order is 0 on all videos, then the videos sort in the order you added the videos.

6. Click Save.

Edit Training Video

Follow these steps to add Training Videos to Online RMS:

- 1. Access *Training Videos Administration*. For instructions, refer to "Access Training Videos" on page 166.
- 2. Optionally, search for specific training videos to ensure the video you want to edit. For instruction, refer to "Search Training Videos" on page 167.
- 3. Click on the Edit icon on the video you want to update.

Trainir	aining Videos Administration Go Back Add							
Show 10 + entries Search:								
ID ti	Video URL 11	Page 11 Category	Application 1: Page	Sort 11 Order	Acknowledge 11 Required	Description 11	Actions	
2	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes	0	2	
3	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		6	

4. The *Training Video* dialog box appears.

Training Video							
ID							
2							
VIDEO URL							
https://www.public-safety-cloud.net/public/InterActRMS-WebHelp/RMS_							
VIDEO FILE TYPE							
.mp4 Video 🔻							
Application Page							
Data Submission	•						
VIDEO DESCRIPTION							
http://www.ejusticesolutions.co WebHelp/RMS_11.0_Introduction							
Acknowledge Required	Sort Order						
v	0						
	Close Save						

5. Update the values in the fields as needed:

ID

The ID is read-only. This number uniquely identifies the video and is generated automatically when you click the Save button.

Video URL

The URL to the video file. Contact Caliber Public Safety to add videos.

Video File Type

Online RMS supports only MP4 files at this time.

Application Page

Select the appropriate Application Page from the drop-down list provided.

Application Page
Data Submission
-Select-
Administration Agencies
Administration Landing
Administration Users
Data Submission
Forms and Reports
Home Page
Incident Names
Incident Narratives
Incident Offenses
Incidents Approval
Incidents Create
Incidents Header
Incidents Landing
Incidents Mapping
Incidents SmartSearch
Incidents Status
Incidents Summary
Master Indexes

Video Description

Enter a description for the video.

Acknowledge Required

Keep the box checked to require users to acknowledge having watched the video. The video continues to pop-up automatically each time you log into Online RMS and access a page to which the video is associated until you acknowledge having watched it. The date and time watched by the user is saved to the database on videos that are required.

Uncheck the box if users are not required to acknowledge having watched the video.

Sort Order

Enter the Sort Order if you want to sort the video list in a particular order. It sorts by ID by default.

6. Click Save.

Delete Training Videos

Follow these steps to delete Training Videos from Online RMS:

- 1. Access *Training Videos Administration*. For instructions, refer to "Access Training Videos" on page 166.
- 2. Optionally, search for specific training videos to ensure the video you want to add doesn't already exist. For instruction, refer to "Search Training Videos" on page 167.
- 3. Click the **Delete icon** on the video you want to remove.

Trainir	ng Videos Administration					(Go Back Add Video
Show 10 • entries Search:							
ID ti	Video URL	11 Page Category	Application 11 Page	Sort 1. Order	Acknowledge Required	1. Description 1	Actions
2	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Data Submission	0	Yes	0	2
3	https://www.public-safety-cloud.net/public/InterActRMS- WebHelp/RMS_11.0_Introduction.mp4	Incidents	Incidents Mapping	0	No		6

4. Click **Yes** to confirm deletion, or **No** to return to the previous screen without deleting.

Chapter 13. Permissions Module

This module provides access to features used by your agency/schema to comprise the various roles necessary for daily operations. Access within this module varies greatly, depending upon the users administrative roles/permissions.

Permission Categories

Permission Categories are assigned certain Roles, and Roles are assigned specific Permissions.

Click the **Permissions** icon on the *Administration Home* page to open the *Permission Categories* page. Alternatively, click the **Permissions** option on the **Administration** menu.

				Go Back
Show 10 + entries	Search	:		
Category		ţ1	Actions	ţ1
Administration - Activate Users in Agency			•	
Administration - Activate Users in Organization			•	
Administration - Activate Users in System			•	
Administration - Add County			•	
Administration - Add Supervised Agencies to User			•	
Administration - Agency Admin			•	
Administration - Agency Civil Process Admin			•	
Administration - Agency Field Arrest Admin			9	
Administration - Agency Officer Daily Admin			•	
Administration - Agency Setup Wizard			•	
Showing 1 to 10 of 388 entries Previous 1 2	3	4 5	39	Next

This page lists the various **Permissions Categories** that are available to your agency/schema. While Permissions Categories are managed by Caliber Public Safety personnel, agency personnel with proper permissions can view the available categories and details. **Permissions Categories** are listed in alphabetical order.

To view the Roles and Permission details of a particular Category, either click the View

icon in the Actions column or on the Category link to open the Permission Category

Details page. With appropriate permissions you can also add one or more roles directly to a Permission Category.

			Go Back
Show 10 + entries	Search:		
Category		1 Actions	; 1↓
Administration - Activate Users in Agency —— Click the link or the View icon to display the Category de	tails —	→ 💿	
Administration - Activate Users in Organization		•	
Administration - Activate Users in System		•	
Administration - Add County		•	
Administration - Add Supervised Agencies to User		9	
Administration - Agency Admin		•	
Administration - Agency Civil Process Admin		•	
Administration - Agency Field Arrest Admin		•	
Administration - Agency Officer Daily Admin		9	
Administration - Agency Setup Wizard		•	
Showing 1 to 10 of 388 entries Previous 1 2	3 4	5 3	89 Next

Note: See "Permission Categories Details" below for more information.

Permission Categories Details

To view the Roles and Permission details associated with a particular **Permission Category**, locate the category to view, then either click the view icon in the **Actions** column or the Category link to open the *Permission Category Details*.

	Edit Role Go Back
Roles	13 Active Users
Role	
CFS	
DISPATCH	
DBA	
OFFICER	
CID_USER	
Permissions	
Permission Description	Dispatch To
Calls For Service - Create an incident from a call	createIncidentFromDispatch
Incidents - Get Header Fields for Incident Creation AJAX	getCreationFields
Ajax call for validating a report # client side	validateReportNumber

From this page, you can:

- View the Roles associated with this **Permission Category**.
- View a list of permissions that are associated with the Roles.
- Add one or more Roles directly to a permission category.

Click the Edit Role button then select one or more Roles.

OLES			
Search		Select All	Select Non
AGENCY_ADMIN	CFS		
AGENCY_AD_HOC_REPORTING_T	DISPATCH		
CAL_ADMIN	DBA		
CAL_MANAGER	OFFICER		
CASE_SUPERVISOR	CID_USER		
CID_SUPERVISOR			
COMMAND			
COPY_DL TEST -			

• View a list of active users that have one or more of the Roles listed.

Click the Active Users link to view the active user list.



Note: For more information on Roles, see "Roles" on page 77.

Chapter 14. Tables

Code Tables and RMS Tables are used throughout the Online RMS application by users with proper permissions and are maintained from the Tables page. Additional System Tables are available to Caliber Public Safety personnel only and are not available for general use.

Access Tables

Click the **Tables** icon on the *Administration Home* page to access the *Tables* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.

Alternatively, click on the **Administration** option on the top navigation bar to display the drop-down menu, then click **Tables**.



The **Tables** page opens with two tabs: Code Tables and RMS Tables.

Note: A System Tables tab is also available to Caliber Public Safety personnel only, for agency setup purposes.



- For information on **Code Tables** "Code Tables" below.
- For information on **RMS Tables** tab is the second tab. "RMS Tables" on page 184.

Code Tables

The **Code Tables** tab is open upon access of the *Tables* page.

Code Tab	les RMS Tables		Go Ba
SEARCH E		Search	
-Select-	- v	Enter search text	
		Reset Search	
S.NO ↓†	Code It	Description 41	Actions
1	INCCASE_OFFICER_REASON_CODES	INCCASE_OFFICER_REASON_CODES	Ľ
2	DELEGATE_PRIVILAGES	DELEGATE_PRIVILAGES	ľ
3	INCCASE_OFFICER_ROLE_CODES	INCCASE_OFFICER_ROLE_CODES	ľ
4	SEARCH_EJS_CASEOFFICER	SEARCH_EJS_CASEOFFICER	ľ
5	PERSON_COLLAPSE_SRCH_CODES	PERSON_COLLAPSE_SRCH_CODES	Ľ
6	SEARCH_DATASET	SEARCH_DATASET	ľ
7	INCCASE_ACTIVITY_NOTES_CODES	INCCASE_ACTIVITY_NOTES_CODES	ľ
8	BUSINESS_COLLAPSE_SRCH_CODES	BUSINESS_COLLAPSE_SRCH_CODES	ľ
9	REPORTS_CATEGORY	REPORTS_CATEGORY	ľ
10	SEARCH_EJS_REPORTS	SEARCH_EJS_REPORTS	ľ
11	VEHICLE_COLLAPSE_SRCH_CODES	VEHICLE_COLLAPSE_SRCH_CODES	Ľ
12	ADDRESS_COLLAPSE_SRCH_CODES	ADDRESS_COLLAPSE_SRCH_CODES	ľ
13	SUBMIT_APPROVAL_GROUP	SUBMIT_APPROVAL_GROUP	ľ

The **Code Tables** tab displays a list of code tables that RMS uses to populate Lists of Values (LOV), or pick lists.

From this tab, administrative users with the appropriate roles/permissions can perform the following tasks:

- Search existing code tables. "Search Code Tables" on the facing page for instructions.
- Edit a code in a code table. For more information, refer to "Edit a Code Table" on the facing page for instructions.

Search Code Tables

Use the following procedure to search the **Code Tables**.

- 1. Click I in the Search By field.
- 2. Select from the drop-down. (Available options include: Code, Description, and Table Name.)
- 3. Click in the Search text field and type in a keyword.
- 4. Click the **Search** button to redisplay the table as shown below for a search for *codes* with the key word *INCIDENT*.

				Go Ba
Code Tables	RMS Tables	5749-04		
Code	~	SEARCH		
		Reset	Search	
S.NO	↓↑ Code	It	Description	↓î Actions
1	INCIDENT_TYPE_CODES	+1	INCIDENT_TYPE_CODES	Actions
2	INCIDENT_STATUS_CODES		INCIDENT_STATUS_CODES	
3	SEARCH_INCIDENT_NARRATIVE		SEARCH_INCIDENT_NARRATIVE	ľ
4	INCIDENT_VALIDATION_TAB_COL	DES	INCIDENT_VALIDATION_TAB_CODES	ľ
5	INCIDENT_WORKGROUP_CODES		INCIDENT_WORKGROUP_CODES	Ľ
6	INCIDENT_ACTION_CODES		INCIDENT_ACTION_CODES	ď
7	INCIDENT_CASE_STATUS_HISTORY		Xref for History_Id_Seq	Ľ
8	INCIDENT_CASES		Xref for Inc_Case_Seq	ď
9	INCIDENT_PROPERTIES		Xref for INCPRO_SEQ	ď
10	INCIDENT_VEHICLES		Xref for INC_VEH_SEQ	Ľ
11	Incident XML Extract		Incident XML Extract	ľ
12	INCIDENT_AUDIT_ACTIVITY_COD	ES	INCIDENT_AUDIT_ACTIVITY_CODES	Ľ
13	INCIDENT_AUDIT_CODES		INCIDENT_AUDIT_CODES	ľ
14	INCIDENTS		Incidents	ď

Codes containing the keyword display.

5. Navigate to the Next page as needed until you locate the specific code.

Edit a Code Table

Use the following procedure to edit a code table.

- 1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 180 for details.
- 2. Click in the Actions column to display Code Table Details.

			Go Back	Setup Agency Codes
Code Table Details				
CODE	SCREEN PROMPT	SCREEN PROMPT		
INCIDENT_TYPE_CODES				
NOTES				
SORT ALPHABETICALLY @ HO	ver mouse over question bubble ting	e for information about		
Codes				Add New Code
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	ā
ARIES	ARIES Accident Report		\checkmark	
NOTES			SYSTEM REQUIRE	D
			Ν	
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	ā
ACC	Accident		\checkmark	_
NOTES			SYSTEM REQUIRE	D
			Ν	
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	â
AFG	Accident FSGI		\checkmark	_
NOTES			SYSTEM REQUIRE	D

- 3. Click the Add New Code link to add a code that has been setup, or update existing entries as needed.
- 4. Click on the **Delete** icon to remove a code from the list.
- 5. Click the **Setup Agency Codes**s button on the top right of the page to include Agency Codes. **Select an Agency** from the list, then click into the **Codes** field and select one or more codes to add them to the **Codes** field.

C. J. T. H. D. 4.1.		Go Back Setup Agency Codes	
Code Table Details			_
CODE	SCREEN PROMPT	SYSTEM REQUIRED	
INCIDENT_TYPE_CODES		Υ	

		Go Back
SELECT AN AGENCY		
Indiana State Police 🗸 🗸		
CODES Q	Click the X to remove selection	
Criminal Trespass	al Bite	
	Save	

Click Save, then click Go Back to return to the Code Table Details page.

- 6. To delete a code from the code table, refer to "Delete a Code" below.
- 7. Click **Save** at the bottom of the page to save changes and return to the *Tables* page.

Delete a Code

Use the following procedure to delete a code from a code table.

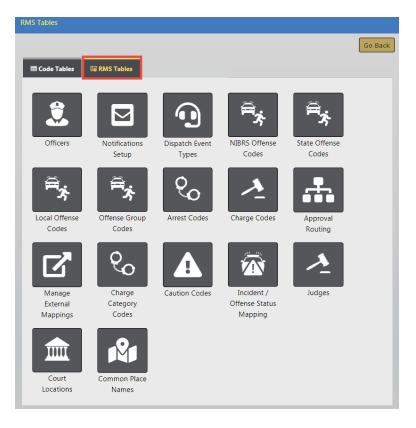
- 1. Locate the code table on the *Tables* page. Refer to "Code Tables" on page 180 for details.
- 2. Click in the Actions column to display the *Edit Code Table*. Refer to "Edit a Code Table" on page 181 for details.
- 3. Locate the code you want to delete then click 👼 to the right of the code.

			Go Back Setup A	Agency Codes
Code Table Details				
CODE	SCREEN PROMPT		SYSTEM REQUIRED	
INCIDENT_TYPE_CODES			Y	
NOTES				
SORT ALPHABETICALLY				
✓				
Codes			• Ac	dd New Cod
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	D
ARIES	ARIES Accident Report		\checkmark	_
NOTES			SYSTEM REQUIRED	
			Ν	
CODE	DESCRIPTION	SCREEN PROMPT	ACTIVE	> 💼
ACC	Accident		\checkmark	_
NOTES			SYSTEM REQUIRED	
			Ν	

4. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Tables* page.

RMS Tables

From the *Tables* page, click the **RMS Tables** tab to display the *Tables* page. For details on how to access the Tables page refer to "Access Tables" on page 179.



Each icon on this page provides links to an RMS Table.

Note: Links are permission-based, so the list varies by user. If you do not see a particular link on the **RMS Tables** tab, it is likely because your user account is not configured to access that item.

- The <u>Officer</u> link displays the *Officers* table. "Officers" on page 186 for information and instructions.
- The <u>Dispatch Event Types</u> link displays the *Dispatch Event Types* table. "Dispatch Event Types" on page 189 for information and instructions.
- The <u>NIBRS Offense Codes</u> link displays the *NIBRS Codes* table. "NIBRS Codes" on page 191 for information and instructions. (National Incident Based Reporting System (NIBRS) is an incident-based reporting system for crimes.)

- The <u>State Offense Codes</u> link displays the <u>State Offense Codes</u> table. "State Offense Codes" on page 193 for information and instructions.
- The <u>Local Offense Codes</u> link displays the *Local Offense Codes* table. "Local Offense Codes" on page 196 for information and instructions.
- The <u>Offense Group Codes</u> link display the *Offense Group Codes* table. See "Offense Group" on page 199 for information and instructions.
- The <u>Arrest Codes</u> link displays the *Arrest Charge Codes* table. "Arrest Charge Codes" on page 201 for information and instructions.
- The <u>Charge Codes</u> link displays the *Charge Codes* table. "Charge Codes" on page 204 for information and instructions.
- The <u>Charge Category Codes</u> link displays the *Charge Categories* table. See "Charge Categories" on page 209 for information and instructions.
- The <u>Caution Codes</u> link displays the *Caution Codes* table. See "Caution Codes" on page 211 for information and instructions.
- The <u>Incident Status / Offense Status Mapping</u> link displays the *Incident Status/Offense Status Mapping* table. See "Incident Status/Offense Status Mapping" on page 218 for information and instructions.
- The <u>Judges</u> link display the Judges table. See "Judges" on page 223 for information and instructions.
- The <u>Court Locations</u> link displays the *Court locations* table. See "Court Locations" on page 220 for information and instructions.
- The <u>Common Place Name</u> link displays the *Common Place Names* table. See "Common Place Names" on page 225 for information and instructions.
- The <u>Approval Routing</u> link displays the <u>Approval Routes</u> table. "Approval Routes" on page 230 for information and instructions.
- The <u>Manage External Mappings</u> link displays the *Mapping Types* table. "Mapping Types" on page 234
- The <u>Notifications Setup</u> link displays the *Notification Types* table. "Notification Types" on page 227 for information and instructions.

Officers

From the **RMS Tables** tab of the *Tables* page, click the <u>Officer</u> link to display the *Officers* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Show 50 🛊 entries					G Search:	o Back 🕀 Add Office
Last Name î↓	First Name î	Middle Name 1↓	Title 11	User Id 1↓	Badge #	11 Actions 1
Admin	County				123	2
Avery	Peter (off)	Т	Officer		205	2
Collins	timmy				997	2
Dude	Det			SA_CID	SA_CID	2
Evidence2	Employee				654321	2
Friday	Joe	A		C_ADMIN	11122	2
Gordmanson	Christian (osuper)	Fred			200	2
Gordmanson	Christian (osuper)	н			70	2
Gordmanson	Christopher	Fred			80	2
Gordmanson2	Christian (osuper)				90	2
Gumbrell	Terry (cid super)	н	CID Supervisor	STATE_CIDSUP1	10	e e

Export Officer List to Excel

You can export the contents of the Officer Table to Excel. Click on the **Export All To Excel** button to download the Excel file to your local machine.

Search Officers

Use the following procedure to search the Officers table.

- 1. Click in the **Search** text field and type in a keyword.
- 2. The search results automatically return records where data matches the text you typed in the Search field.

Last Name	II First Name 11	Middle Name 🛛 🏦	Title 🕮	User Id 🛛 👔	Badge # 👘	Actions	
Hanover	Jeff		Officer Supervisor	STATE_OSUPER8	96965	ľ	Î
Hedges	Joe		Officer		7049	ľ	Î
Officer	Dispatch				88888	ľ	Î
Officer	Test			OFFICER_TEST	1234	ľ	Î
OfficerTest	TestNewOfficer	New	DeleteMe		123456789	ľ	Î
Sunsonsen	Officer				68249	ľ	Î
TempOfficerLN	TempOfficer				887456985	ľ	
TestOfficerLN2	TestOfficer2				654321987741258	ľ	Ĩ
Wright	Greg	QA	SERGEANT-CAPTAIN- WIN	STATE_OFFICER11	9696	ď	
Showing 1 to 9 of 9 ent	ies (filtered from 31	. total entries)			Pre	evious 1	Next

Add an Officer

Use the following procedure to add an officer record to the Officers table.

1. Click the **Add Officer** button in the upper right corner of the *Officers* table to display an *Officer Information* tab.

	Go Back
Officer Information	
Officer Information	
FIRST NAME	Agency
	ANGTESTAGENCY
MIDDLE NAME	BADGE #
LAST NAME	DISPATCH ID
SUFFIX	CAD BADGE
Τιτιε	JOB STATUS
Go Back	Save

- 2. Complete all required fields and optional fields as applicable.
- 3. Click all **Jbb Status** check boxes that apply to this officer.
- 4. Click Save to save the record and return to the Officers table.

Edit an Officer

Use the following procedure to edit an officer record in the Officerstable.

- 1. Locate the officer record you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the *Edit Officer* page as shown.

												Go Back
Officer Information												
Officer	Informat	ion										
FIRST NA	ME						AGENCY					
Joe				All Othe	r				•			
MIDDLE NAME				BADGE #								
A				11122								
LAST NA	ME						DISPATCH I)				
Friday												
SUFFIX							CAD BADGE					
TITLE							JOB STATUS					
							PATROL DETECTIVE ACTIVE					
						Go Back	pdate Save					
							فنعا للننية					
Officer	History											
Date	Last Name	First Name	Middle Name	Suffix	Title	Agency	Badge Number	Dispatch Id	CAD Badge	Patrol	Detective	Active
2013- 03-07	Friday	Joe	A			All Other	11122			Y	Υ	Ν
	Friday	Joe				All Other	11122			Y	Υ	Ν

Officer History appears on the bottom portion of the screen showing updates that have occurred to that particular record. Officer History does not appear if updates to the record have not yet occurred.

- 3. Make changes as needed, clicking Save as needed to prevent loss of changes.
- 4. When changes are complete, click **Update** to save the record and return to the *Officers* table.

Delete an Officer

Use the following procedure to delete an officer record from the Officerstable.

1. Locate the officer record you need to delete from the table.

- 2. Click in the Actions column in the same row as the record listing to display the confirm deletion prompt.
- 3. Confirm deletion and return to the Officerstable.

Dispatch Event Types

From the **RMS Tables** tab of the *Tables* page, click the <u>Dispatch Event Types</u> link to display the *Dispatch Event Types* table. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Show 10 + entries			Go Back Add Event Type Search:
Code 1	Description 14	Active 14	Actions 11
EMS	EMS	true	2
FIRE	Fire	true	ď
POLICE	Police	true	ď
Showing 1 to 3 of 3 entries			Previous 1 Next

Add a Dispatch Event Type

Use the following procedure to add a dispatch event type record to the *Dispatch Events Types* table.

1. Click the Add Event Type button to display an Add Event Type prompt as shown.

Add Event Type	
CODE	
DESCRIPTION	
ACTIVE	
	Cancel Save

2. Click in the **Code** field and type a code for the new dispatch event type.

- 3. Click in the **Description** field and type a brief description of the new dispatch event type.
- 4. Leave the Active button checked.
- 5. Click **Save** to save the record and return to the *Dispatch Events Types* table, or click **Cancel** to return without saving.

Edit a Dispatch Event Type

Use the following procedure to edit a dispatch event type record in the *Dispatch Event Types* table.

- 1. Locate the record you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the Add Event Type prompt as shown with values in the fields and check box.

Edit Event Type	
CODE	
EMS	
DESCRIPTION	
EMS	
	Cancel Save

3. Make changes as needed, then click **Save** to save the changes, and return to the *Dispatch Event Types* table.

Delete a Dispatch Event Type

Use the following procedure to delete a dispatch event type record from the *Dispatch Event Types* table.

- 1. Locate the record you need to delete from the table.
- 2. Click 💼 in the Actions column.
- 3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Dispatch Event Types* table.

NIBRS Codes

From the **RMS Tables** tab of the *Tables* page, click the <u>NIBRS Codes</u> link to display the *NIBRS Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

NIBRS Codes			Go Back 🗣 Add NIBRS Code			
Show 50 \$	entries		Search:			
NIBRS Code∏	Description 11	Offense 🛛 🕄 Group	Crime Against 🛛 🕄	Actions 11		
90Z-S	All Other Offenses - Victim Types S	В	SOCIETY	2		
90Z-NON-S	All Other Offenses - Non-Society Victim	В	PERSON	2		
90Z-ILS	All Other Offenses - Victim Typs - ILS	В	SOCIETY	2		
90Z-IL	All Other Offenses - Victim Type - IL	В	PERSON	2		
90Z-GS	All Other Offenses - Victim Types GS	В	SOCIETY	2		
90Z-GILS	All Other Offenses - Victim Type - GILS	В	SOCIETY	2		
90Z-GIL	All Other Offenses - Victim Type - GIL	В	SOCIETY	2		
90Z-G	All Other Offenses - Victim Types G	В	SOCIETY	2		
90Z- EXCLUSIVE	All Other Offenses - Exclusive on Report	В	SOCIETY	2		
90Z	All Other Offenses	В	PERSON, SOCIETY	2		
90J	Trespass of Real Property	В	SOCIETY	2		
901	Runaway	В	NOT A CRIME	2		

Search NIBRS Codes

Use the following procedure to search the NIBRS Codes table.

- 1. Click in the **Search** text field and type in a keyword.
- 2. Click Search to redisplay the table with the search results.

Add a NIBRS Code

Use the following procedure to add a NIBRS code to the NIBRS Codes table.

1. Click the Add NIBRS Code button in the upper right corner of the NIBRS Codes table to display the Add NIBRS Code page.

CODE	OFFENSE GROUP	DESCRIPTION	
	-Select-	•	
DETAILED DESCRIPTION			
CRIME TARGETS			
Crime Targets Click To Select			

- 2. Click in the **Code** field (required) and type in a code.
- 3. Select an Offense Group, if applicable.
- 4. Click in the **Description** field and type a brief description of the code.
- 5. Click in the **Detailed Description** field and type a long description, if applicable.
- 6. Click in the Crime Targets field and choose one or more options from the list.
- 7. Click **Save** to save the record and return to the *NIBRS Codes* table.

Edit a NIBRS Code

Use the following procedure to edit a NIBRS code to the NIBRS Codes table.

1. Locate the NIBRS code record you need to edit in the table.

2. Click in the Actions column in the same row as the record listing to display the *Edit Officer* page as shown.

NIBRS Code			Go B	lack
CODE	OFFENSE GROUP		DESCRIPTION	
90Z	в	•	All Other Offenses	
DETAILED DESCRIPTION				
				_
CRIME TARGETS				
× PERSON × SOCIETY				
		Go Back	Save	

- 3. Make changes as needed.
- 4. Click **Save**. A successful save message briefly appears at the top of the page.
- 5. Click Go Back to return to the Officerstable.

Delete a NIBRS Code

Use the following procedure to delete a NIBRS code from the NIBRS Codestable.

- 1. Locate the NIBRS code record you need to delete from the table.
- 2. Click 👼 in the Actions column.
- 3. Click Yes to confirm deletion, or click No to cancel deletion, and return to the *NIBRS Codes* table.

State Offense Codes

From the **RMS Tables** tab of the *Tables* page, click the <u>State Offense Codes</u> link to display the *State Offense Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Show 10 💠 er	ntries		Searc	Go Back	Add State Code
State Offense †↓ Code	NIBRS Code 11	Description 🛛	Status 1↓	Actions	t1
10-14-3-29.5	90Z - All Other Offenses	Public Safety- Violation Of Local Travel	Inactive		6
11-8-8-15	90Z - All Other Offenses	CORRECTION- SEX OFFENDER FAIL TO POSSESS	Active		2
11-8-8-17	90Z - All Other Offenses	Correction- Sex Offender Registration Vi	Active		2
11-8-8-18	90Z - All Other Offenses	Correction- Sexual Violent Predator Duty	Active		2
1111555	90Z - All Other Offenses	Test	Active		6

Search State Offense Codes

Use the following procedure to search the State Offense Codes table.

- 1. Click in the **Search** text field and type in a keyword.
- 2. Click Search to redisplay the table with the search results.

Add a State Offense Code

Use the following procedure to add a state offense code to the State Offense Codes table.

1. Click Add State Code button in the upper right corner of the State Offense Codes table to display an Add State Offense Code page as shown below.

State Code				Go Back
State Offense Code	-Select-	~	DESCRIPTION	
DETAILED DESCRIPTION				
				li.
Астіче	IBR Code		Arrest Codes	
OFFENSE GROUPS				
Click To Select				
INCIDENT TYPE				
Click To Select				
		Go Back	Save	

2. Complete all required fields and applicable optional fields.

- 3. Leave the Active button checked.
- 4. Enter the IBR Code.
- 5. Optionally, select the Offense Groups.
- 6. Optionally, select the **Incident Type** to relate incident types to offenses.

Relating one or more Incident Types to an offense requires at least one related offense on the Incident Report when that Incident Type is added to an Incident Report.

7. Click Save to save the record and return to the State Offense Codes table.

Edit a State Offense Code

Use the following procedure to edit a state offense code in the State Offense Codes table.

- 1. Locate the state offense code you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the Edit State Offense Code page as shown.

		Go Back
STATE OFFENSE CODE	NIBRS CODE	DESCRIPTION
10-14-3-29.5	90z - All Other Of 🗸	Public Safety- Violation Of Local Travel Advisory
DETAILED DESCRIPTION		
ACTIVE	IBR CODE	ARREST CODES
OFFENSE GROUPS		
Click To Select		
	Go Back	Save

- 3. Make changes as needed.
- 4. When changes are complete, click **Save** to save the record and return to the *State Offense Codes* table.

Delete a State Offense Code

Use the following procedure to delete a state offense code from the *State Offense Codes* table.

- 1. Locate the code you need to delete from the table.
- 2. Click in the Actions column.
- 3. Click Yes to confirm deletion, or click No to cancel deletion, and return to the State Offense Codes table.

Local Offense Codes

From the **RMS Tables** tab of the *Tables* page, click the <u>Local Offense Codes</u> link to display the *Local Offense Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Show 10 🔹	entries		Go Back C Ado	l Local Offense (Code 🛛 🖶 Print
Local î↓ Offense	Description 👔	State Offense 👔	NIBRS Code 🛛 🕄	Status 🛛 A	ctions îl
0001	Ordinance Violation - Disorderly Conduct			Inactive	e i
1111555	Test			Inactive	2
12333	Local Offense - Failure to Register			Active	2
6.2.106.A :M: 1350	Homicide Criminally Negligent Manner	35-42-1-1 M01	09A	Inactive	2
ANG TEST	Ang Test			Active	2
IA-32644	Testing			Inactive	6
REGION 2 LOCAL OFFENSE TEST	Region 2 Local Offense Test			Active	2
TEST LOCAL OFFENSE	Test Offense Description	10-14-3-29.5	90Z	Active	2
TESTING123	Testing123	9-21-8-52A	90Z	Inactive	2
Showing 1 to 9 o	f 9 entries			Previous	1 Next

Search Local Offense Codes

Use the following procedure to search the Local Offense Codestable.

- 1. Click in the **Search** text field and type in a keyword.
- 2. Click Search to redisplay the table with the search results.

Add a Local Offense Code

Use the following procedure to add a local offense code to the Local Offense Codes table.

1. Click the Add Local Offense Code button to display the Add Local Offense Code page as shown below.

	Go Back
OFFENSE	
DESCRIPTION	
Go Ba	save

- 2. Complete fields.
- 3. Click Save to save the record and return to the Local Offense Codes table.

Edit a Local Offense Code

Use the following procedure to edit a local offense code in the Local Offense Codes table.

- 1. Locate the code you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the Edit Local Offense Code page as shown.

Local Offense Code		Go Back
Offense	REQUIRE APPROVAL	
0001		
Agency Q		
County of Mark		
DESCRIPTION		
Ordinance Violation - Disorderly Conduct		
STATE OFFENSE		
11-8-8-15 - CORRECTION- SEX OFFENDER FAIL TO POS	SESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	•
NIBRS CODE		
90Z - All Other Offenses		•
Status		
InActive		•
Arrest Codes		
G	io Back Save	

- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the *Local Offense Codes* table.

Delete a Local Offense Code

Use the following procedure to delete a local offense code from the *Local Offense Codes* table.

- 1. Locate the code you need to delete from the table.
- 2. Click in the Actions column to display a confirmation prompt.
 - **Note:** A confirmation prompt displays only if the code is not associated with an incident report. Otherwise, the following message displays: This offense cannot be removed because it is associated with one or more incident reports. You may edit this offense and set it to inactive. To inactivate the code, access the *Edit Local Offense Code* page and select **Inactive** from the drop-down menu in the **Status** field, then click **Save**.
- 3. Click Yes to confirm deletion, or click No to cancel deletion, and return to the *Local Offense Codes* table.

Offense Group

From the **RMS Tables** tab of the *Tables* page, click the <u>Offense Group Code</u> link to display the *Offense Group Codes* table. For instructions on accessing the *Tables* page refer to <u>AccessTables.htm</u>.

Offense Groups	ffense Groups G					
Show 50 ¢ entries				Search:		
Group ID	11 0	Group Name 🕅	Agency Code	†↓	Actions 11	
9	Т	TEST GROUP	All Agencies		e	
8	Т	TEST GROUP	All Agencies		2	
5	C	GROUP NAME 1	D13		2	
3	Т	TEST_BURGDUP	D42		e e	
2	т	TEST_BURGDUP	D42		e	
1	Т	TEST_BURGLARY	D42		e	
Showing 1 to 6 of 6 entrie	es			Previ	ous 1 Next	
<					>	

Search Offense Groups

Use the following procedure to search the Offense Groups table.

- 1. Click in the **Search** text field and type in a keyword.
- 2. Click **Search** to redisplay the table with the search results.

Add an Offense Group

Use the following procedure to add an offense group to the Offense Groups table.

1. Click the **Add Offense Group** button to display the *Add Offense Group* page as shown below.

Offense Group	
GROUP NAME	
Agency	
All Agencies	~
OFFENSE CODE	
	E
SELECTED OFFENSES	
	Cancel Save

- 2. Complete fields.
- 3. Click **Save** to save the record and return to the Offense Groups table.

Edit a Local Offense Code

Use the following procedure to edit an offense group code in the Offense Groups table.

- 1. Locate the code you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the *Edit Offense Group* page as shown.

Offense Group	
GROUP NAME	
TEST GROUP	
AGENCY	
All Agencies 🗸	
OFFENSE CODE	
SELECTED OFFENSES	
HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEF ANG TEST CODE Ang Test Off Code	
Cancel Save	

- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the Offense Groups table.

Delete a Local Offense Code

Use the following procedure to delete an offense group from the Offense Groups table.

- 1. Locate the code you need to delete from the table.
- 2. Click 👼 in the Actions column.
- 3. Click Yes to confirm deletion, or click No to cancel deletion.

Arrest Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the <u>Arrest Codes</u> link to display the *Arrest Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Show 10 💠 ent	ries				Go Back Search:	•	Add Arrest Code
Arrest Code 🏻 🏦	Description 1	State Offense	11	Active		11 A	ctions î↓
10-14-3-29.5	PUBLIC SAFETY- VIOLATION OF LOCAL TRAVEL ADVISORY DESIGNATIONS	10-14-3-29.5		Y			2
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15		N			e <u></u>
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17		Y			2
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18		Y			2
1111555	Test	1111555		N			2
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7		Y			2
12333	Local Offense - Failure to Register	12333		Y			2
13-30-10-5	ENVIRONMENT- UNDERGROUND STORAGE TANK VIOLATIONS	13-30-10-5		Y			2
13-30-10-6	ENVIRONMENT- STATE REGULATED WETLAND LAW VIOLATIONS	13-30-10-6		Y			2
13-30-2-1	ENVIRONMENT- ENVIRONMENTAL ACT VIOLATIONS	13-30-2-1		Y			2
Showing 1 to 10 of	968 entries	Pr	revious	1 2	3 4 5		97 Next

Search Arrest Charge Codes

Use the following procedure to search the Arrest Charge Codes table.

- 1. Click in the **Search** text field and type in a keyword.
- 2. Click Search to redisplay the table with the search results.

Add an Arrest Charge Code

Use the following procedure to add an arrest charge code to the *Arrest Charge Codes* table.

1. Click the **Add Arrest Code** button in the upper right corner of the *Arrest Charge Code*s table to display an *Add Arrest Charge Code* page as shown below.

ARREST CODE			WARRANT M	Go Back ODULE O Click info bubble for a definition of this button
STATE OFFENSE				~
	Go Ba	ack Save		

- 2. Complete required fields and applicable optional fields. Any field with a red lefthand border is a required field. You must complete required fields to continue.
- 3. Select the Warrant Module button to allow this arrest code to be used in the Warrant module. The button is green when selected, or gray when deselected.
- 4. Click Save to save the record and return to the Arrest Charge Codes table.

Edit an Arrest Charge Code

Use the following procedure to edit an arrest charge code in the Arrest Charge Codes table.

- 1. Locate the arrest charge code you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the *Edit Arrest Charge Code* page as shown.

		Go Back
ARREST CODE	ACTIVE	WARRANT MODULE
10-14-3-29.5	\checkmark	
CODE DESCRIPTION		
PUBLIC SAFETY- VIOLATION	OF LOCAL TRAVEL ADV	VISORY DESIGNATIONS
STATE OFFENSE		
-Select-		~
	Go Back	Save

- 3. Make changes as needed.
- 4. Click Save to save the record and return to the Arrest Charge Codes table.

Delete an Arrest Charge Code

Use the following procedure to delete an arrest charge code from the *Arrest Charge Codes* table.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column.
- 3. Click **Yes** to confirm deletion, or click **No** to return to the *Arrest Charge Codes* table without deleting.

Charge Codes

From the **RMS Tables** tab of the *Tables* page, click the <u>Charge Codes</u> link to display the *Charge Codes* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

			Go Back	🛨 Add Charge	Code Manage	e Charging Lan	guage Template		
Enter searc	Enter search text Reset Search								
Charge 11 Code	Charge Description	Offense ⊥† Code	Statute 11	Category 11	Class ⊥†	Display ⊥†	Actions		
10-14-3- 29.5	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	2		
11-8-8-15	CORRECTION- SEX OFFENDER FAIL TO POSSESS INDIANA DRIVERS LICENSE OR IDENTIFICATION	11-8-8-15	11-8-8-15	Misdemeanor	Class 1 Misdemeanor	Y	2		
11-8-8-17	CORRECTION- SEX OFFENDER REGISTRATION VIOLATION	11-8-8-17	11-8-8-17	Misdemeanor	Class 1 Misdemeanor	Y	2		
11-8-8-18	CORRECTION- SEXUAL VIOLENT PREDATOR DUTY TO NOTIFY VIOLATION	11-8-8-18	11-8-8-18	Misdemeanor	Class 1 Misdemeanor	Y	2		
12-32-1-7	HUMAN SERVICES- FALSE STATEMENT FOR PUBLIC BENEFITS	12-32-1-7	12-32-1-7	Misdemeanor	Class 1 Misdemeanor	Y	2		

Search Charge Codes

Use the following procedure to search the Charge Codestable.

- 1. Type a keyword in the **Search** text box in the upper right of the form.
- 2. Click **Search** to redisplay the table with the search results that match your entered text.

Add a Charge Code

Use the following procedure to add a charge code to the Charge Codestable.

1. Click the **Add Charge Code** button in the upper right of the *Charge Code*stable to display a *Add Charge Code* page as shown below.

Charge Code						Go	Back
CHARGE CODE		CATEGORY			CLASS		
		-Select-		•	Select a Category First		٣
DESCRIPTION							
BOND TYPE		BOND AMOUNT			DISPLAY		
-Select-	Ŧ						
EFFECTIVE DATE		INACTIVE DATE					
	曲			曲			
OFFENSE CODE		STATUTE			Fine		
CHARGE DETAILS							
CHARGING TITLE					CHARGING LANGUAGE TEMPLATES		
					-Select-	٣	0
MODULES (LEAVE BLANK FOR ALL)							_
Click To Select							_
BOI	sos		SPEEDING		VARIABLE FINE		
SUSPEND	FINGERPRINT	r			Admin Court		
		_					
DOMESTIC VIOLENCE	CANNOT M	ODIFY CATEGORY	CANNOT MODIFY CLA	ss			
DEFAULT CATEGORY & CLASS ON ENTRY		DND TYPE & AMOUNT ON					
DEFAULT CATEGORY & CLASS ON ENTRY	ENTRY	DND TYPE & AMOUNT ON					

- 2. Complete all required fields and any applicable optional fields.
- 3. Check all boxes that apply to this charge code.

Note: The **Display** check box must be checked for the charge code to display throughout areas of Online RMS where charge codes pulled-in.

4. Click **Save** to save the record and return to the *Charge Codes* table.

Edit a Charge Code

Use the following procedure to edit a charge code in the Charge Codestable.

- 1. Locate the record you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the *Edit Charge Code* page.
- 3. Make changes as needed.
- 4. Click Save to save changes and return to the Charge Codestable.

Delete a Charge Code

Use the following procedure to delete a charge code from the *Charge Codes* table. You can delete a charge code when it has not yet been used anywhere in Online RMS.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge code. To disable the charge code, uncheck the **Display** check box.
- 3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Codes* table.

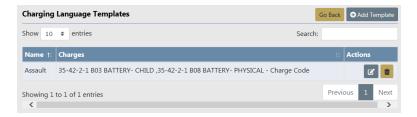
Manage Charging Language Templates

Use the following procedure to manage charging language templates.

Note: You must have appropriate permissions to perform this function.

1. Click the **Manage Charging Language Templates** button in the upper right corner of the *Charge Codes* table to display a *Charging Language Templates* page as shown below.

Note: You cannot delete a charge code that has been used in Online RMS. To disable the charge code, uncheck the **Display** check box.



Add Template

1. Click the Add Template button to open the Add Charging Language Template form.

dd Charging Language Template	Go Back
IMPLATE NAME	
☞ ※ ि ট ট ଢ ← → Ϙ \$3 ∞ ∞ ☶ ≣ ♡	
B I U II, I≟ :≡ I HE HE Styles • Format • Size • IA. A.•	
글 글 Line Hei ▪	
body	
Go Back Save	

- 2. Enter a unique Template Name.
- 3. Enter text into the body area of the template, optionally using the standard formatting options.
- 4. Click Save to create the template and return to Charging Language Template.

Edit a Charging Language Template

Use the following procedure to edit a Charging Language Template.

- 1. Locate the record you need to edit.
- 2. Click in the Actions column to open the Edit Charging Language Template.

it Charging Language Template	Go Back
MPLATE NAME	
ssault	
「 X h l l l l l l l l l l l l l l l l l l	
did purposely, knowingly and unlawfully cause bodily injury to (Victim Name) by (Fact of Offense).	
This in violation of Section 97-3-7(1)(a) MCA of 1972.	
Go Back Save	

- 3. Make changes as needed.
- 4. Click Save to save changes and return to Charging Language Templates.

Delete a Charging Language Template

Use the following procedure to delete a charging language template.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing. If you do not see the delete icon, then you do not have the ability to delete.
- **3.** If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charging Language Template*.
- 4. Click Go Back to return to the Charge Codestable.

Charge Categories

The **Charge Categories** page allows you to manage the Default Bond Type, Amount, and Active setting for Charge Categories. **Charge Categories** are associated to Charge Codes and display on the *Field Arrest* and *Warrant Charge* spages.

From the **RMS Tables** tab of the *Tables* page, click the <u>Charge Category Codes</u> link to display the *Charge Categories* table as shown in the following example. For details on how to access the *Tables* page refer to "Access Tables" on page 179.

Show 10	entries		Go Back C	Add Charge Category
Code †↓	Description 1	Classes	L Active 1	Actions 1
С	Civil	Class:Infraction Bond Type: Bond on Companion Case Bond Amount: \$500	Yes	2
DT	Deliquency	Class:Class C Misdemeanor	Yes	2
F	Felony	Class:Class 1 Felony Bond Type: Drivers license Bond Amount: \$666 Class:Class 2 Felony Class:Class 3 Felony Bond Type: Bond on Companion Case Bond Amount: \$150 Class:Felony State Class:Capital Felony Class:Variable Class Felony	Yes	ď i
М	Misdemeanor	Class:Class A Misdemeanor Bond Type: 25% Surety Bond (Bond Agent) Bond Amount: \$0 Class:Class B Misdemeanor Class:Class C Misdemeanor Class:Variable Class Misdemeanor Class:Lass 1 Misdemeanor Bond Type: Drivers license Bond Amount: \$6000		ď

Add a Charge Category

Use the following procedure to add a charge category to the Charge Categories table.

1. Click the Add Charge Category button in the upper right corner of the Charge Categories table to display a Add Charge Category page, and click the Add Class link to add the Category Code.

RMS Tables / Charge Categ	ory Codes / Add Charge	Category Code				
Charge Category Code						Go Back
CODE	DE	SCRIPTION		ACTIVE		
L						
						Add Class
Code	Description	Bond Type	В	ond Amount	Active	Actions
		-Select-	•			â
		Save				

- 2. Complete all required fields and any applicable optional fields.
- 3. Check the Active box on the top section of the form if applicable.
- 4. Check the Active box on the Class line items where applicable.
- 5. Click Save to save the record and return to the Charge Categories table.

Edit a Charge Category

Use the following procedure to edit a charge category in the Charge Categories table.

- 1. Locate the record you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the *Charge Category* page.
- 3. Make changes as needed.
- 4. Click Save to save changes and return to the Charge Categories table.

Delete a Charge Category

Use the following procedure to delete a charge code from the *Charge Categories* table. You can delete a charge category when it has not yet been used anywhere in Online RMS.

Note: You cannot delete a charge category that has been used in Online RMS. To disable the charge category, uncheck the **Active** check box.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing. If the delete icon is not available to you, then you are not able to delete the charge category. To disable the charge category, uncheck the Action check box.
- 3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Charge Categories* table.

Caution Codes

The **Caution Codes** table provides a method to create and maintain a customized set of warnings that can be used on Master Person and Master Address records to inform personnel, with access to Master Indices, of potential dangers or problems specific to those persons and addresses.

Caution examples

Persons with active warrants, on probation, known to carry firearms, or suicidal tendencies.

An address that has a violent dog or an unusually tall fence.

A red Alert icon appears next to the person's name or address in the *Search Results* window, indicating active Caution Codes or Warrants. Hover your mouse over the Alert icon to view a summary of the all the active alerts, or click on the Alert icon to open details of all active alerts in a pop-up window.



Persor	n Details						
LAST I Smith	KST NAME FIRST NAME SEX RACE mith Joe Male White						
ALIAS Bonb	ies 5 Joe Smith(Alias), J	John Smith(Alias)		CELL PHONE (555)-555-5555	E-MAIL Test@gmail.com		
	tess (Residence) West Elm Street Ch	icago, IL 60610-0001		Неіднт 5' 12"	WEIGHT 160	EYE COLOR Black	
INDEX 2	(ID						
Active	e Warrants						
	Agency:	Indiana State Police		Index ID: 65		0	
	Issue Date:	06/18/2014 11:54			nith, Joe	_	
	Status:	Active	Bond Type: 25	% Surety Bond (Bond Ag	ent)	_	
				% Surety Bond (Bond Ag		_	
Active	Status: Bond Amount:	Active \$0.00		% Surety Bond (Bond Ag	ent)	_	
Active CP ID #	Status: Bond Amount: Charge:	Active \$0.00 35-43-1-1A - ARSON-		% Surety Bond (Bond Ag	ent)	Actions	
CP ID	Status: Bond Amount: Charge: Court Papers	Active \$0.00 35-43-1-1A - ARSON-	VEHICLE	% Surety Bond (Bond Ag Reference #: sd Expiration	ent) fsdc(Docket #)	Actions	
CP ID #	Status: Bond Amount: Charge: Court Papers Type/Sub Type	Active \$0.00 35-43-1-1A - ARSON-	VEHICLE Reference #s	% Surety Bond (Bond Ag Reference #: sd Expiration Date	ent) fsdc(Docket #) People/Organizations		
CP ID #	Status: Bond Amount: Charge: Court Papers Type/Sub Type Subpoena/Civil	Active \$0.00 35-43-1-1A - ARSON- Order/Criminal	VEHICLE Reference #s Court Case Number: abc	% Surety Bond (Bond Ag Reference #: sd Expiration Date 51	ent) fsdc(Docket #) People/Organizations		
CP ID # 53 75	Status: Bond Amount: Charge: Court Papers Type/Sub Type Subpoena/Civil Civil Protection	Active \$0.00 35-43-1-1A - ARSON- Order/Criminal Order/Criminal	VEHICLE Reference #s Court Case Number: abc Court Case Number: 651651	% Surety Bond (Bond Ag Reference #: sd Expiration Date 51 111	ent) fsdc(Docket #) People/Organizations 0 Joe Smith: Active	0	
CP ID # 53 75 78	Status: Bond Amount: Charge: Court Papers Type/Sub Type Subpoena/Civil Civil Protection Civil Protection	Active \$0.00 35-43-1-1A - ARSON- Order/Criminal Order/Criminal	VEHICLE Reference #s Court Case Number: abc Court Case Number: 651651 Court Case Number: 111111	% Surety Bond (Bond Ag Reference #: sd Expiration Date 51 111	ent) fsdc(Docket #) People/Organizations	•	

You may also search person or address records by Caution Code and date range. Refer to the *Caliber Public Safety Online RMS User Guide* for details.

Agency administrators with appropriate permissions can create **Caution Codes**, Caution Categories, and assign Caution Category Roles, allowing administration of **Caution Codes** by specified user Roles and Categories. For example, you could have a specialized unit that keeps track of persons on probation, and only agency administrators or users assigned to this Role can add, edit or delete these codes on person records.

From the **RMS Tables** tab of the *Tables* page, click the <u>Caution Codes</u> link to display the *Caution Codes* table. For instructions on accessing the *Tables* page refer to <u>AccessTables.htm</u>.

					Add Caution Co
how 10 \Rightarrow ent	Description	11 Category 11	Category Roles	Search:	Actions
ASC	Assaultive/Combative			Yes	2 1
AST	Assaulted officer			Yes	C i
DEA	Deceased	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	6
DMMCAUTION	Dana's Caution Code	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	C i
DRG	Known drug user			Yes	2
ESC	Escape Risk			Yes	2
FSG	FSG VIOLENT caution			Yes	2
GNG	Known Gang Member	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	1
HAIDS	Has AIDS	VIPER	VIPER	Yes	2
HEA	Health/Handicapped			Yes	6

Two tabs are associated with the **Caution Codes** page: *Caution Codes* and *Caution Category Codes*.

Caution Codes Tab

The *Caution Codes* tab lists the Category Codes and associated Caution Category Codes and Roles, if any.

Note: Caution Category Codes are optional. Refer to the "Caution Category Codes Tab" on page 216 section for more information.

Caution Codes	Caution Categor	'y Codes				Go Ba
C Add Caute Show 10				Add Caution Code		
Code 11	Caution ↑. Type	Description 1	Category 1	Category Roles	Active	Actions
BOD	Address	Beware of Dog			Yes	6
BF	Address	Big Fence			Yes	6
PVA	Person	Armed at prior arrest	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	6
AST	Person	Assaulted officer			Yes	2
ASC	Person	Assaultive/Combative			Yes	2

Associating a Category Code and Role to a Caution Code allows designated users exclusive access to administer the Category Code on a person record.



Note: If a Caution Category Role is not associated with a Role, or a Caution Category Code is not associated with a Caution category, then every user has access.

Add Caution Codes

Use the following procedure to add a caution code to the *Caution Codes* tab of the Caution Codes table.

1. Click the Add Caution Code button in the upper right corner of the Caution Codes table to display a New Caution Code page.

New Caution Code	
Code	
DESCRIPTION	
Астіче	
-Select-	~
CATEGORY	
-Select-	~
CAN DUPLICATE	
	Close Save

- 2. Complete all required fields.
- 3. Optionally select a **Category** from the list. Categories are defined under the *Caution Category Codes* tab.

Note: Refer to the "Caution Category Codes Tab" on page 216 section for more information.

- 4. Select all buttons that apply to this caution code. Green buttons are active and gray buttons are inactive.
- 5. Click Save to save the record and return to the Caution Codestable.

Edit Caution Codes

Use the following procedure to edit a caution code in the Caution Codestable.

- 1. Locate the record you need to edit.
- 2. Click in the Actions column in the same row as the record to display the Edit Caution Code page.

Edit Caution Code	
Code BOD	
DESCRIPTION	
Beware of Dog	
Астіле	
 ✓ 	
CAUTION TYPE	
Address	~
CATEGORY	
-Select-	~
CAN DUPLICATE	
 ✓ 	
	Close Save

- 3. Make changes as needed.
- 4. Click Save to save changes and return to the Caution Codestable.

Delete Caution Codes

Use the following procedure to delete a caution code from the Caution Codestable.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- **3.** If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Codes* table.

Caution Category Codes Tab

Caution Category Codes group similar Caution Codes and control who has access to administer the Caution Code by the Category Roles based on User Roles.

Note: It is not unusual to create new User Role(s) for Caution Code administration purposes. Refer to "Roles" on page 77 for more information on Roles.

Caution Categories are optional. You can have a few or as many that makes sense for your agency.

				Go Ba
Caution Codes Ca	ution Category Codes			
			🕀 Ac	ld Category Code
Show 10 🜩 entr	ies	Sea	arch:	
Category Code 1	Description 1	Category Roles	Active î	Actions
GTF	Gang Task Force	CID_SUPERVISOR, GANG ALWAYS EDIT AGENCY	Yes	2
VIP	VIPER	VIPER	Yes	2
Showing 1 to 2 of 2	entries		Previ	ous 1 Next
<				>

Add Caution Category Codes

Use the following procedure to add a Caution Category Code to the *Caution Category Codes* tab of the Caution Codes table.

1. Click the Add Category Code button in the upper right corner of the Caution Category Codestab to display a New Category Code page.

New Category Code
CODE
GIF
DESCRIPTION
Gang Task Force
ACTIVE
\checkmark
ROLES
CID_SUPERVISOR & GANG ALWAYS EDIT AGENCY
Close Save

- 2. Complete all required fields.
- 3. The Active box is checked by default.
- 4. Click in the **Roles** field and select one or more from the list to associate to the **Category Code**.
- 5. Click Save to save the record and return to the Caution Category Codestab.

Edit Caution Category Codes

Use the following procedure to edit a charge code in the *Caution Category Codes* tab of the Caution Codes table.

- 1. Locate the record you need to edit.
- 2. Click in the Actions column in the same row as the record to display the Edit Caution Category Code page.

Edit Category Code	
CODE	
VIP	
VIPER	
× VIPER	
	Close Save

- 3. Make changes as needed.
- 4. To remove a Role, click on the X on the left of that Role.
- 5. Click Save to save changes and return to the Caution Category Codestab.

Delete Caution Codes

Use the following procedure to delete a caution code from the Caution Codestable.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- 3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Caution Category Codes* tab.

Incident Status/Offense Status Mapping

The Incident Status / Offense Status Mapping page allows *Incident Status* codes to be mapped to *Offense Status* codes to prevent mismatches.

During the approval process, if the user sets an *Incident Status* to something other than what has been mapped to an *Offense Status*, an error displays disallowing that selection and prompts them to verify the information and make any necessary changes.

From the **RMS Tables** tab of the *Tables* page, click the <u>Incident Status/Offense Status</u> <u>Mapping</u> link/icon to display the *Mapping* stable. For instructions on accessing the *Tables* page refer to <u>AccessTables.htm</u>.

Show 50 \$ er	ntries	Search:	
Incident Code 🏗	Incident/Case Status	Offense Status(es)	11 Actions 1
00	Open	00: Open/Pending	2 0
02	Cleared by Arrest	02: Cleared by Arrest	2
07	Other Enforcement Action	07: Other Enforcement Action 16: Open Pending Destrucyion Of Property	2
10	Cleared Exceptionally By Death Of Offender	10: Cleared Exceptionally By Death of Offender	2
11	Cleared Exceptionally - Prosecution Declined, No Complaint Filed	11: CLEARED EXCEPTIONALLY - PROSECUTION DECLINED, NO COMPLAINT FILED	2
12	Cleared Exceptionally - Extradition Denied	12: CLEARED EXCEPTIONALLY - EXTRADITION DENIED	2
13	Cleared Exceptionally - Victim Refused To Cooperate	13: CLEARED EXCEPTIONALLY - VICTIM REFUSED TO COOPERATE	e i
14	Cleared Exceptionally - Juvenile No Custody	10: Cleared Exceptionally By Death of Offender 11: CLEARED EXCEPTIONALLY - PROSECUTION DECLINED, NO COMPLAINT FILED 12: CLEARED EXCEPTIONALLY - EXTRADITION DENIED 13: CLEARED EXCEPTIONALLY - VICTIM REFUSED TO COOPERATE 14: CLEARED EXCEPTIONALLY - JUVENILE NO CUSTODY	ď
22	Closed - Unfounded	05: Closed	2
30	Cleared by Citation	07: Other Enforcement Action	2

Add Incident and Offense Status Mapping

1. Click the **Add Incident Mapping** button in the upper right corner of the *Mappings* table to display an *Incident Mapping* page.

Incident Mapping	
INCIDENT STATUS CODE	
01 : Warrant Request Approved 🗸 🗸	
OFFENSE CODES	
× 01: Warrant Request × 07: Other Enforcement Action	
Close Save	

- 2. Select an Incident Code from the list.
- 3. Select one or more Offense Codes.
- 4. Click Save to save the record and return to the Mappingstable.

Edit Incident and Offense Status Mapping

1. Locate the record you need to edit.

2. Click in the Actions column in the same row as the record to display the *Incident Mapping* page.

Incident Mapping	
INCIDENT STATUS CODE Other Enforcement Action OFFENSE CODES	
× 07: Other Enforcement Action × 16: Open Pending Destrucyion Of Property	
	Close Save

- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the *Mapping*stable.

Delete Incident and Offense Status Mapping

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- **3.** If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Mapping*stable.

Court Locations

Agencies using the *Qvil Process* and *Warrant* modules have the ability to manage Court Locations. Only agency administrators with proper permissions can add, edit, and delete *Court Locations*. The *Qvil* and *Warrant* modules display the *Court Locations* as a list of values when adding court papers and warrants. You can only select a court location that appears in the list of values; as *Court Locations* change, the list of values from which to choose also automatically change.

There are up to three ways to access the *Court Locations* table, depending on your permission level:

- From the Main Menu select Administration, Module Admin, then Civil Process. For more information refer to "Civil Process Agency Settings" on page 294.
- From the Main Menu select Administration then Agencies. Find the appropriate agency from the listed agencies then click the <u>edit</u> link next to the agency name. For more information refer to the *Other Tables* section of "Agency Settings" on page 29.

• Click the <u>Court Locations</u> link on the **RMS Tables** tab of the <u>Tables</u> page to display the <u>Court Locations</u> table. For instructions on accessing the <u>Tables</u> page refer to <u>AccessTables.htm</u>.

RMS Tables / Court Locations							
					Go Back 🕒	Add Court Lo	cation
Agend	y: District 42, Versailles	•					
Show	50 🗢 entries			Sear	ch:		
ID îl	Name 🗈	Address 11	Status 🛍	Court 11	Receiving î⊥ Agency	Actions	îΙ
1	Court Location 1 - Alternate Name	101 Webster St. Room #345 Bloomington Colorado 11111-2222	Active	true	true	ľ	
2	DL Supreme Court - Judge Dredd	1776 Lincoln Street 390 Zang Street Denver -	Active	true	true	ľ	
11	Judy's Court -	123 Judge Drive Courtopolis Colorado 12345-	Active	true	true		Ē
14	A'postrophe's Court -	123 A'postrophe Lane A'postrophe North Carolina 80012-	Active	true	true	ľ	
23	New Court -	New Court Courtsville Colorado 11111-	Active	true	true	ľ	

Follow the same procedure to add, edit, and delete *Court Locations*, regardless of which access option you use.

Add Court Locations

Use the following procedure to add a court location to the *Court Locations* table.

1. Click the **Add Court Location** button in the upper right corner of the *Court Locations* table to open a blank entry form.

			Go Back
COURT NAME		COURT NAME 2	
ADDRESS 1		ADDRESS 2	
СІТҮ		STATE	
		-Select-	~
ZIP		PHONE	
	-		
JURISDICTION NAME		JURISDICTION TYPE	
		-Select-	~
COMMENT			
COURT LOCATION	RECEIVED FROM AGENCY	ACTIVE	AFFIDAVIT FOOTER
		\checkmark	
		_	
		Save	

- 2. Complete all required fields and optionally complete others.
- **3.** Check all boxes that apply. If you select Affidavit Footer, enter the appropriate information in the additional text box that appears below the buttons.

		AFFIDAVIT FOOTER
AFFIDAVIT FOOTER TEXT		/
	ave	

4. Click **Save** to save the record and return to the *Court Locations* table.

Edit Court Locations

Use the following procedure to edit a caution code in the Court Locations table.

- 1. Locate the record you need to edit.
- 2. Click in the Actions column in the same row as the record to open the record for editing.

	Go Back
COURT NAME	COURT NAME 2
DL Supreme Court	Judge Dredd
ADDRESS 1	ADDRESS 2
1776 Lincoln Street	390 Zang Street
CITY	STATE
Denver	Colorado
ZIP	PHONE
15406 -	303-672-6745
JURISDICTION NAME	JURISDICTION TYPE
	-Select-
COMMENT	
New court location for Denver	
COURT LOCATION RECEIVED FROM	AGENCY ACTIVE AFFIDAVIT FOOTER
\checkmark	
	Save

- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the *Court Locations* table.

Delete Court Locations

Use the following procedure to delete a court location from the Court Locations table.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- **3.** If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Court Locations* table.

Judges

To setup judges, click the <u>Judges</u> link on the **RMS Tables** tab of the *Tables* page. For instructions on accessing the *Tables* page refer to <u>AccessTables.htm</u>.

Show 10	• entries				ć		Go Back • Add Judge
No. 1↓	Last Name	First Name	Middle Name 11	Title 11	Searc	n: Active 11	Actions
7	Stem	Robert		Judge		Y	2 0
8	Roe	Jan		Judge		Y	e e
9	Webber	Fredrick		Judge		Y	2 0
10	Zan	Debbie		Judge		Y	c î
11	Smith	John		JUDGE		Υ	2
12	Smith	John		JUDGE		Υ	2
14	Bloom	Judy		JUDGE		Υ	2
15	Bloom	Judy		JUDGE		Υ	2
16	Jerry	Smith		JUDGE		Υ	2
17	Judy	Judge		JUDGE		Y	2
showing 1	to 10 of 16 entries					Previous 1	2 Next

Add Judge

Use the following procedure to add a judge to the *Judges* table.

1. Click the **Add Judge** button in the upper right corner of the *Judge*stable to open a blank entry form.

Judge	
LAST NAME	
FIRST NAME	
TITLE USER ID	
Close	Save

- 2. Complete all required fields and optionally complete others.
- 3. Click **Save** to save the record and return to the *Judges* table.

Edit Judges

Use the following procedure to edit a judge in the *Judges* table.

- 1. Locate the record you need to edit.
- 2. Click in the Actions column in the same row as the record to open the record for editing.

Judge	
LAST NAME	
Stem	
FIRST NAME	
Robert	
MIDDLE NAME	
TITLE	
Judge	
USER ID	
ACTIVE	
\checkmark	
	Close Save

- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the *Judges* table.

Delete Judges

Use the following procedure to delete a judge from the *Judges* table.

- 1. Locate the record you need to delete from the table.
- 2. Click 🗰 in the Actions column in the same row as the record listing.
- 3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Judges* table.

Common Place Names

The **Clery Act** requires that higher education institutions report campus crimes associated with the institution. Many universities have only one address, yet the campus complex could have hundreds of buildings and locations that are either on or off the main campus, are residential facilities, or adjacent to campus; all of which share the same address. Online RMS provides the ability to associate any *Common Place Name* associated with an address and map it to any pre-defined location code. For example, an officer taking a report for an incident that occurred in a classroom receives the option of choosing from a list of Clery locations like *On Campus* or *Residential Facility*; in this case the officer selects, *On Campus*.

Click the <u>Common Place Names</u> link on the **RMS Tables** tab of the *Tables* page to display your agency's *Common Place Names* table. For instructions on accessing the *Tables* page refer to <u>AccessTables.htm</u>.

			Go Ba	ck 🕀 Add (Common	Place
Show 10 🜩 entries			Search:			
Name	î↓ Agency	1	Active	11 Act	ions	1
Outside Store	Indiana State Police	,	Yes		ľ	Î
hotspot	Indiana State Police	1	Yes		ľ	Î
ANG TEST	District 42, Versailles	,	Yes		ľ	Î
Dead strip	District 42, Versailles	,	Yes		ľ	Ì
District 42 test	District 42, Versailles	,	Yes		ľ	Î
sidewalk	District 35, Evansville	`	Yes		ľ	Î
Hill	All Other	,	Yes		ľ	Î
ANG TEST		,	Yes		ľ	Î
Health Center		•	Yes			Î
TEST		,	Yes		ľ	Ô
Showing 1 to 10 of 11 entries			Pr	evious 1	2	Next

Add Common Place Name

Use the following procedure to add a common place name to the *Common Place Names* table.

1. Click the Add Common Place button in the upper right corner of the Common Place Namestable to open a blank entry form.

AME	AGENCY	ACTIVE	
Outside Store	Indiana State Police	✓	
ATEGORIES			
* Non-Campus × Publi	c Property		
	1 2		

- 2. Enter the Name and select the Agency if applicable.
- 3. The Active box is checked by default.
- 4. Select one or more **Categories** that apply.

Note: Online RMS provides five *Categories* by default: Non-Campus, Off Campus, On Campus, Public Property, Residential Facilities. Contact Caliber Public Safety personnel to assist with updates to this list.

5. Click Save to save the record and return to the Common Place Names table.

Edit Common Place Names

Use the following procedure to edit a common place name in the *Common Place Names* table.

- 1. Locate the record you need to edit.
- 2. Click in the Actions column in the same row as the record to open the record for editing.
- 3. Make changes as needed.
- 4. Click Save to save changes and return to the Common Place Names table.

Delete Common Place Names

Use the following procedure to delete a common place name from the *Common Place Names* table.

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- 3. If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Common Place Names* table.

Notification Types

From the **RMS Tables** tab of the *Tables* page, click the <u>Notifications Setup</u> link to display the *Notification Types* table. For instructions on accessing the *Tables* page refer to <u>AccessTables.htm</u>.

Search Notification Type

Use the following procedure to search the *Notifications Types* table.

- 1. Click I in the Search By field.
- 2. Select from the drop-down. (Available options include: Action URL, Description, Email, Information Notification, Priority, Roles, and Type.)
- 3. Click in the Search text field and type in a keyword.
- 4. Click **Search** to redisplay the table with the search results as shown in the example below.

SEARCH		SEARCH						
urgent		Priority		~				
			Re	eset	Search			
Type↓î	Description 1	Priority ↓1	Informational Notification	††	Send ↓î Email	Action URL	Roles ↓↑ Notify	Actions
15	Disapproved Incident Repor	Urgent	Ν		Y	Irutil.Do?Dispatchto=Navi gatetoincident&Neweditmod e=Y&	Not Available	ľ
39	High Priority Incident Approved - For Your Consideration	Urgent	Ν		N	Irutil.Do?Dispatchto=Navi gatetoincident&	Not Available	ľ
4	Vehicle Alert	Urgent	Ν		N	Vehicle.Do?Dispatchto=Vie w&	Not Available	ľ
8	Gang Alert	Urgent	Ν		Y	Managegang.Do?Dispatchto= Getdata&Summary=True&	Not Available	ľ
2	Administrative	Urgent	N		Y	Display User Profile Main tenance Screen For User	Not Available	ľ
5	Business Alert	Urgent	Ν		Y	Showorganization.Do?Dispa tchto=Vieworganization&	Not Available	ľ
3	Person Alert	Urgent	N		Y	Person.Do?Dispatchto=View &	Not Available	Z
6	Property Alert	Urgent	N		Y	Manageproperties.Do?Dispa tchto=View&	Not Available	ľ
7	Location Alert	Urgent	N		Y	Locations.Do?Dispatchto=V iew&	Not Available	ľ

The example is the result of a search for *Priority* with the key word *Urgent*.

Add a Notification Type

Use the following procedure to add a notification type to the Notification Types table.

1. Click the **Add Notification Type** button in the upper right corner to display an *Add Notification Type* page as shown below.

			Go	io Back
PRIORITY		NOTIFICATION AGENCY TYPE		
Urgent	~	Police Agency		~
DESCRIPTION		ACTION URL		
HIGH PRIORITY INCIDENT APPROVE	D - FOR YOUR CONSIDERATION	IrUtil.do?dispatchto=navigateToIncio	lent&	
ROLES				
* CAL_ADMIN * COMMAND				
NOTIFY COMMENT				
GLOBAL VARIABLE 1	GLOBAL VARIABLE 2	GLOBAL VARIABLE 3	GLOBAL VARIABLE 4	
incidentId	supplementId			
GLOBAL VARIABLE 5				
Other Options				
INFORMATIONAL ONLY	NOTIFY USER	SEND EMAIL	SEND TO ALL AGENCIES	
	\checkmark			
USER DELETE	QUERY ONLY	RESTRICT WORK GROUP		
\checkmark	\checkmark			
	Go Back	Update		

- 2. If needed, click 🖬 in the **Priority** field and select another priority.
- 3. Click I in the **Notification type** field and select a type
- 4. Complete other fields as applicable.
- 5. Click to check Other Options boxes as needed.
- 6. Click Save to save the record and return to the Notification Types table.

Edit a Notification Type

Use the following procedure to edit a notification type record in the *Notification Types* table.

- 1. Locate the notification type record you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the *Edit Notification Type* page.
- 3. Make changes as needed then click **Update**.

Delete a Notification Type

Use the following procedure to delete a notification type record from the *Notification Types* table.

- 1. Locate the notification type record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- 3. Click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Notification Types* table.

Approval Routes

From the **RMS Tables** tab of the *Tables* page, click the <u>Approval Routing</u> link to display the <u>Approval Routes</u> table as shown in the following example:

Click individual links	Go Back
Routing Options	
Add Routes	
View Routes by Offense	
Route Simulator	
Review Routing	

Add Routes

Click Add Routes to open the Add Approval Route page as shown.

RMS Tables / Approval Routing / Add Approval Route				
Offenses			Go B	ack
Select offenses using the autocomplete below, or select a NIBRs of	code	e to add all offenses belonging to that NIBRS code.		
OFFENSE CODE				
NIBRS CODE				
-Select-				۲
SELECTED OFFENSES Leave Blank For All Remove All				
				*
				Ŧ
Notification				
NOTIFICATION		DESTINATION AGENCY		
-Select-		-Same As Source Agency-		•
User cannot change destination agency at time of approval		APPLY TO ANY SUPPLEMENT 🚱		
Source Agencies				
SOURCE AGENCIES Leave Blank For All				
Click To Select				
Statuses				
STATUSES Leave Blank For All				
Click To Select				
(Save			

Complete all required fields and as many others as are applicable.

Click **Save** to open the *Route Results* page with the new route.

View Routes by Offense

Click <u>View Routes by Offense</u> to open the Offenses With Routes page as shown.

how 10 ¢ er	itries		Search:			
Offense Code 1	Description	NIBRS 1 Code	NIBRS Description	Count 1		
14-21-1-36	NATURAL RESOURCE- POSSESS LOOTED PROPERTY	280	Stolen Property Offenses	1		
14-21-2-4	NATURAL RESOURCE- PURCHASE/SALE OF ITEMS REMOVED FROM CEMETERY	280	Stolen Property Offenses	1		
14-22-30-1	NATURAL RESOURCE- UNLAWFUL USE OF EXPLOSIVES IN STATE WATERS	520	Weapon Law Violations	1		
16-42-19-16	HEALTH- LEGEND DRUG FRAUD	90Z	All Other Offenses	1		
22-11-14-6	SAFETY- FIREWORKS REGULATION LAW VIOLATIONS	520	Weapon Law Violations	1		
22-11-20-6	SAFETY- POSSESS ANHYDROUS AMMONIA IN UNAPPROVED CONTAINER	520	Weapon Law Violations	1		
35-42-1-1 M02	MURDER- ATTEMPTED- FIREARM	09A	Murder and Nonnegligent Manslaughter	1		
35-42-1-1 M03	MURDER- ATTEMPTED- KNIFE	09A	Murder and Nonnegligent Manslaughter	1		
35-42-1-1 M04	MURDER- ATTEMPTED- NO WEAPON	09A	Murder and Nonnegligent Manslaughter	1		
35-42-1-1 M05	MURDER- ATTEMPTED- OTHER	09A	Murder and Nonnegligent Manslaughter	1		

Click on a Offense Code link to view offense details.

OFFENSE 14-21-1-	36 - Natural Resource- Po	ossess Looted Prop	perty			Go Back
Route ID	Notification Type	Statuses	Source Agencies	Destination Agency	Required	Actions
768	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	(All Statuses)	(All Agencies)	(Same As Source)	No	C 💼

Route Simulator

Click <u>Route Simulator</u> to open the *Route Simulator* page as shown.

		Go Back
Parameters		
OFFENSE CODE		
		—
SELECTED OFFENSES		
ORIGINATING AGENCY		
-Select-		~
INCIDENT STATUS		
-All Statuses-		~
	Show Routes	
Results		

Click into the **Offense Code** field and begin typing to display a list that matches your entered test. Select the appropriate Offense Code from the list and your selection appears in the **Selected Offenses** box automatically. Repeat for additional offenses. if needed.

Complete required fields and others as needed, then click **Show Routes** to display the results at the bottom of the *Route Simulator* page.

		Go Back
Paramete	rs	
OFFENSE C	ODE	
		
SELECTED (DFFENSES	
14-15-1	1-11 Natural Resource- Operate A Motorboat While I	Icense Suspended
ORIGINATI	NG AGENCY	
Indiana	State Police	~
INCIDENT	STATUS	
-All State	uses-	~
	Show Routes	
Results		
Send	Notification	Destination Agency
	INCIDENT APPROVED - FOLLOW UP CASE DECISION NEEDED	(Can Modify)

Check the Send box and modify the text in the Destination Agency field as needed.

Mapping Types

From the **RMS Tables** tab of the *Tables* page, click the <u>Manage External Mappings</u> link to display the *Mapping Types* table as shown in the following example:

					Gol
			Search	n:	
ŤL	Description	11	Mapping	ţ1	Actions
	Mobile Ethnicity Codes		4		
	Mobile Eye Codes		25		
	Mobile Hair Codes		24		
	Mobile Race Codes		24		
	Mobile Sex Codes		9		
	T.	Mobile Ethnicity Codes Mobile Eye Codes Mobile Hair Codes Mobile Race Codes	Mobile Ethnicity Codes Mobile Eye Codes Mobile Hair Codes Mobile Race Codes	Pescription Mapping Mobile Ethnicity Codes 4 Mobile Eye Codes 25 Mobile Hair Codes 24 Mobile Race Codes 24	Mobile Ethnicity Codes 4 Mobile Eye Codes 25 Mobile Hair Codes 24 Mobile Race Codes 24

Click the Select icon in the **Action**s column to the far right of any code listing to open a *Mapping for Type* page as shown in the following example.

now 10 🗢 entries		Sea	arch:
Schema Name	ti External Code	11 Local Code	11 Actions
All Schemas]	BR	BRO	
All Schemas]	BROWN	BRO	
All Schemas]	BLK	BLK	Z i
All Schemas]	BRO	BRO	2
All Schemas]	GRN	GRN	
All Schemas]	MAR	MAR	
All Schemas]	PNK	PNK	
All Schemas]	BLU	BLU	2
All Schemas]	GRY	GRY	C I
All Schemas]	HAZ	HAZ	

• To add a mapping, click the **Add Mapping** button to open the **Mapping** window as shown below.

Mapping	
EXTERNAL CODE	
LOCAL CODE	
SCHEMA	
-All Schemas-	~
	Cancel Save

Complete required fields and select the **Schema** if applicable.

Click **Save**. Click **OK** to return to the previous page with the new mapping listed at the bottom of the list. (You may need to navigate to another page to see it.)

• To edit a mapping, click in the **Actions** column to the far right of the listing to open the **Mapping** window as shown below.

Mapping	
EXTERNAL CODE	
A	
LOCAL CODE	
A	
SCHEMA	
-All Schemas-	~
	Cancel Save

Edit the value in the Local Code field and select a difference schema as needed.

Click Save.

Chapter 15. Custom Forms

The Custom Forms feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative user who have been assigned the appropriate role with the custom forms privileges can create or edit custom forms, and only users who have been assigned roles with the custom forms privileges can use the forms.

- "Set Up Agency" below for more information on enabling the feature.
- "Set Up Roles" on the next page for information on setting up roles with custom form privileges.

Community Reporting, a new Online RMS 11.3.2 feature (for minor crime, tips, and other police-related events), leverages the power of Online RMS Custom Forms, allowing agencies to create and manage their publicly available forms.

• See "Community Reporting with Custom Forms" on page 272 for information on Community Reporting.

Set Up Agency

Caliber Public Safety personnel has the ability to enable the Custom Forms feature for an agency; once it is enabled, agency users with the proper permissions can give appropriate access to other agency users.

The Agency Profile displays available and enabled features in a read-only format.

GENCY INTE							
	ERNAL CODE				ORI NUMBER		
IPSC					123456789		
GENCY DISF	PLAY CODE				WEBSITE		
IPSC					www.in.gov/isp/		
GENCY COD	DE DISPLAY TEX	т			HONE		
Indiana St	ate Police				317-899-8293		
GENCY TYP					AX		
Police Age	ncy			~	317-233-3057		
IME ZONE					OINT OF CONTACT		
(GMT-05:0	00) Eastern Ti	me(US and Canada)		~			
External Au	uthentication						
	Tupo Hort Port						
Enabled	Туре	Host	F	Port	Shared Secret	Enable Level	Action
Agency Ad	ministrators	Host radius-public-safety-cloud.co	m	Port 1812 Add	Shared Secret	Enable Level	
Agency Adi ADD User Select U	ministrators	radius-public-safety-cloud.co	m	1812			
Agency Adi ADD User Select U	SAFENET V	radius-public-safety-cloud.co	m	1812			Y Update Delete
Agency Adl ADD User Select U Agency Use	SAFENET V	radius-public-safety-cloud.co		1812		USER	Y Update Delete
Agency Ada ADD USER Select U Agency Use Subscripti	SAFENET V	radius-public-safety-cloud.co	om Contraction (Contraction)	1812	Actual	USER	Y Update Delete
Agency Adi ADD USER Select U Agency Use Subscripti Full Time	SAFENET V	radius-public-safety-cloud.co	Allocated 0	1812	Actual 129	USER Difference -129	Y Update Delete
Agency Adi ADD USER Select U Agency Use Subscripti Full Time Part Time	SAFENET S	radius-public-safety-cloud.co	Allocated 0 0	1812	Actual 129 1	USER Difference -129 -1	Y Update Delete
Agency Adi ADD USER Select U Agency Use Subscripti Full Time Reserve Full Time N	SAFENET S	radius-public-safety-cloud.co	Allocated 0 0 0 0	1812	Actual 129 1 1	USER Difference -129 -1 -1	Y Update Delete

Note: For instructions on accessing the Agency Profile refer to "Manage Agencies" on page 17.

Set Up Roles

An administrator with the appropriate permissions must set up specific roles with permission to use Custom Forms. It is up to the agency as to which roles are assigned Custom Form privileges.

The administrator uses the following procedure to add Custom Forms rights to a role.

1. Access the Roles page and locate the Role you want to give Custom Forms rights to.

Note: For details on accessing the Roles page refer to "Roles" on page 77.

2. Click in the Actions column in the same row as the role to open the Edit Role page.

Note: Never edit Roles that came with the software; make a copy of the Role then edit the copy as needed. For details on how to copy a Role refer to "Copy Role" on page 83.

Show 10 ¢ entries Search:					
Comparet	Role Name 11	Role Description	14 Actions 14		
	COPY_DL TEST	IA-52785	€ ⊕ ₫ /		
	COPY_USER_ADMIN	Role for User Admins	€ • e		
Showing 1 to	2 of 2 entries (filtered from 45 total entrie	rs)	Previous 1 Next		
		Go Back			

3. Click the **Role Permission Categories** tab to open the *Role Permission Categories* page where you can add or remove permissions for the selected role.



ole Name: Copy_User_Admin			
23 items selected	Remove all		Add all
Administration - Show The Main Administration Menu	-	Training - Schema level management.	+
Administration - Users	- ^	User External Authentication Configuration	+ ^
Basic Access	-	User Fields Admin - Add And Edit Fields	+
EJS Support - submit tickets	-	User Forms - Add And Edit	+
User Form Admin - Add And Edit Fields	-	User Forms - Add a Comment	+
User Form Admin - Add And Edit Forms	_	User Forms - Delete A Filled Form	+
User Form Admin - Add New Form Fields	-	User Forms - Export Forms to Excel	+
User Form Admin - Delete A Form Design	_	User Forms - Open Any Form For Edit	+
User Form Admin - Edit Form Routing	-	User Forms - Open a Form For Edit at Agency Level	+
User Form Admin - Edit Form Script	_	User Forms - Open a Form For Edit at Org Level	+
User Form Admin - Export Form Template	_	User Forms - Reject a Form	+
User Form Admin - Form Designer		User Forms - Review a Form	+
User Form Admin - Manage All Code Tables		User Forms - Search And View	+
User Form Admin - Manage Code Tables		User Forms - Search Integration	+
		User Forms - Show Comment And Route Log	+
User Form Admin - Manage Form Reports	-	User Forms - View Form Audit Log	+
User Form Admin - Manage Forms	-	Vehicle - Add New Models	+ -
User Form Admin - Preview Form	- *	Vehicle - Add and Edit	· · ·

4. Click Imes to add permissions from the available list on the right, or click imes to remove permissions from that role on the left.

Note: Custom Forms permissions include anything with the prefix *User Form Admin*.

- 5. Click Save to save changes.
- 6. When changes are complete for this role, click **Go Back** to return to the *Roles* page.
- 7. Log out or continue working in the Roles module as needed.

Form Administration

Click the **Administration** label to display the *Administration Home* page. From the *Administration Home* page, click the **Custom Forms** icon to open the *Form Administration* page.

Form Administration	
Create New Form	Create and design a new form
Upload a Form Design	Create a new form by uploading an XML design file. The layout of the fields will be determined by this XML.
Manage Forms	Preview / Edit / Download or Delete Forms.
Manage Custom Fields	Manage custom fields for various application screens.
Manage Sub Forms	View / Modify Sub Forms
Add Sub Form	Create a new Sub Form.
Manage Form Code Tables	Manage Form Code Tables Used By All Forms.
Form Delete Log	Show log of deleted forms, custom fields, and sub forms.

From here, an administrator can create a new custom form, upload a form design, manage forms, manage custom fields, manage sub forms, add sub form, manage code tables, and show the form delete log. When an administrator adds a new form, certain information is required, such as Name, Title, Default Security Level, Officer Entry, Roles, and Form Types. The agency administrator decides how to fill out the required fields. This information may be changed later if the administrator chooses to edit the forms.

Create (Add) New Form

Use the following procedure to create a new form.

1. From the *Administration - Custom Forms* page, click the <u>Create New Form</u> link to open the *Add Form* page as shown.

Administration - Incidents - Master Indices - Records Management - Forms And Reports - Help - 💄 - 13370 💩 🖪					
Create New Form	Create and design a new form				
Upload a Form Design	Create a new form by uploading an XML design file. The layout of the fields will be determined by this XML.				
Manage Forms	Preview / Edit / Download or Delete Forms.				
Manage Custom Fields	Manage custom fields for various application screens.				
Manage Sub Forms	View / Modify Sub Forms				
Add Sub Form	Create a new Sub Form.				
Manage Form Code Tables	Manage Form Code Tables Used By All Forms.				
Form Delete Log	Show log of deleted forms, custom fields, and sub forms.				

	Go Back Save
Please start by entering basic form information. Once the form that the form will not be available to users until you publish a	
Тітье	
1	
DESCRIPTION	
PRINT HEADER	
	li.
RESTRICT TO AGENCY	
Click To Select	
DEFAULT SECURITY LEVEL	OFFICER ENTRY
Patrol Supervisor	-Select-
REVIEW REQUIRED	Restrict Edit
Roles	
Click To Select	
Form Types	
Click To Select	
Sav	•

2. Type a name for the form in the required **Title** field. This should be a name easily related to the form's function because it is what the user sees when searching for a form.

- **3.** Type a brief description of the form in the optional **Description** field, including information for intended users about the forms purpose. The title is visible on the custom form within RMS but not on the printed form.
- **4.** Type a header for the printed form in the optional **Print Header** field. The Printer Header appears only on the printed form.
- 5. Click in the **Restrict to Agency** field then select one or more agencies to give them the ability to view and edit the form. Usually this field is not used.
- 6. Click ✓ in the **Default Security Level** field and select to change the security level so that only users with a security level as high or higher than the selected security level can view and edit the form. The person who created the form can always view the form regardless of security level.
- 7. Click in the Officer Entry field and select the appropriate option. This selection determines whether an officer entry is required, optional, or unspecified when completing the form.
- 8. Check the **Review Required** box, if appropriate. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
- 9. Check the Restrict Edit box, if appropriate.
- **10.** Click in the **Roles** field and select one or more Roles to limit use of this form to those specific Roles.
- **11.** Click in the **Form Types** field and select one or more Form Types to limit this form to specific Form Types.
- 12. Click Save to save.

The designer opens the new form in the Form Editor. "Form Editor" on page 252 for more information.)

		Exit Form Editor	Preview
Form Details Field List Designer Reports Code Tables R	outing Status		
Publish Status	Active Status		
Not Published	Inactive		
Τπιε			
Ang Test Custom Form 3			
DESCRIPTION			
Ang Test Custom Form 3			
Print Header 🚱			
Ang Test Custom Form 3			
RESTRICT TO AGENCY			
Click To Select			
DEFAULT SECURITY LEVEL	OFFICER ENTRY		
Patrol Supervisor 🗸 🗸	Officer is Required		~
REVIEW REQUIRED	RESTRICT EDIT		
\checkmark	\checkmark		
Roles			
× CASE_SUPERVISOR			
Form Types 🚱			
× Vehicles			
Form Admins 🚱			
SELECTED FORM ADMINS Double Click To Remove			
RESTRICT VIEW ACCESS USERS			
SELECTED USERS Double Click To Remove			
	Save		

Note: From the Administration Home page, you can click on the Custom Forms icon to open the Form Administration page then click the <u>Man-age Forms</u> link to open the Manage Forms page at any time. From the Manage Forms page, you can edit, view, print, and/or delete forms.

The **Publish Status** is listed in red text for forms that are not published.

Upload Form Design

Use the following procedure to upload a form design.

1. From the *Form Administration* page, click the <u>Upload a Form Design</u> link to open the *Upload Form* page as shown.

Form Administration	
Select a File	Go Back
Choose File No file chosen	
Upload	

- 2. Click the **Choose File** button in the **Select a File** field to open the *File Explorer* window listing your local directories.
- 3. Navigate to the folder containing form design documents.
- 4. Click to select a file then click the **Open** button to pull the path into the **Select a File** field.
- 5. Click **Upload** to upload the file.

Manage Forms

Use the following procedure to manage forms.

1. From the *Form Administration* page, click the <u>Manage Forms</u> link to open the *Manage Forms* page as shown.

Form Administration / Ma	anage Forms						
							Go Bat
Forms Created By Your							
Name	Creator	Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
A New Form	Some Guy	District 42, Versailles	11/10/2014 1235	5	Yes	Active	🖻 🛓 २ 🥫
A Simple Custom Form	Sgt. Collins	0	11/07/2014 0831	4	Yes	Inactive	r 🛓 Q 💼
Ang Test Custom Form	Homer Simpson	0	03/02/2017 0934	22	Yes	Inactive	r 🛓 Q 💼
Ang Test Custom Form 3	Homer Simpson	All Agencies	02/26/2019 1058	0	No	Inactive	r 🛓 Q 盾
Another Test Form	Derek Livangood	District 42, Versailles	11/05/2014 1224	0	Yes	View Only	r 🛓 Q 💼
D42 Test Form	Joe Friday	District 42, Versailles	11/17/2014 1350	0	Yes	Inactive	r 🛓 Q 💼
Derek Test Form	Joe Friday	District 42, Versailles	11/05/2014 1054	9	Yes	Active	r 🛓 Q 💼
Derek Test Form 2	Joe Friday	0	11/05/2014 1147	4	Yes	Inactive	r 🛓 Q 💼
New Form	Christine Saur	District 42, Versailles	03/29/2018 1346	0	No	Inactive	r 🛓 Q 💼
New Form	Christine Saur	District 42, Versailles	02/28/2019 1206	0	No	Inactive	r 🛓 Q 盾
Other Forms							
Name		Agencies	Date Created	# of Instances	Publish Status	Active Status	Actions
1 Custom Form to Rule Th	iem All	All Agencies	03/28/2013 1038	93	Yes	Inactive	2 4 0
11.0 Custom Form Test		District 42, Versailles	02/25/2019 0906	1	Yes	Active	୮ 🛓 ସ୍ 🕫
Ann Test		0	07/06/2015 1427	0	No	Inactive	🕑 🛓 Q 💼

- 2. Using the icons in the Action column in the same row as the form, continue as follows:
 - To delete a form, click 👼.

Note: You may not delete a form that is active. You must first deactivated it.

- To download a form (in XML format), click
- To open the Form Preview page with an example of a form, click <a>.
- To edit a form, click . ("Form Editor" on page 252 for instructions.)

Manage Custom Fields

At the top of each section of the Custom Fields form, you have the option to add fields from existing forms or upload custom fields.

Form Administration / Cus	tom Fields				
					Go Back
Incident Offender Fields	;			Add Incident Offen	nder Fields 🕒 Upload Custom Fields
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	2 🛓 💼
District 16, Peru - GA	Yes	Active	Yes	6	2 🛓 💼
- All Agencies -	Yes	Active	Yes	196	e 7
District 42, Versailles	Yes	Inactive	Yes	396	2 🛓 💼
A_standalone Pd	No	Inactive	No	0	Z 1
All Other	No	Inactive	No	0	6 🛨 💼
incident Victim Person I	Fields			Add Incident Victim Per	son Fields 😌 Upload Custom Field
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	2 1
- All Agencies -	Yes	Active	Yes	144	2 1
Indiana State Police	No	Inactive	No	0	2 🛓 💼

Add Fields from Existing Forms

1. From the Form Administration page, click the Manage Custom Fields link to open the *Custom Fields* page.

Form Administration / Cus	stom Fields				
Incident Offender Field	5			Add Incident Offer	Go Back
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
ANGTESTAGENCY	No	Inactive	No	0	2 🛓 💼
District 16, Peru - GA	Yes	Active	Yes	6	2 🛓 💼
- All Agencies -	Yes	Active	Yes	196	Z
District 42, Versailles	Yes	Inactive	Yes	396	2 🛓 💼
A_standalone Pd	No	Inactive	No	0	2 🛓 💼
All Other	No	Inactive	No	0	2 ± 5
Incident Victim Person I	Fields			Add Incident Victim Per	son Fields 😌 Upload Custom Field
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
District 42, Versailles	Yes	Active	Yes	317	2 1
- All Agencies -	Yes	Active	Yes	144	2 🛓 💼
Indiana State Police	No	Inactive	No	0	e 7
Incident Offense Fields				 Add Incident Offer 	nse Fields 🕒 Upload Custom Field
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions
All Other	Yes	Active	Yes	19	e 7
Indiana State Police	Yes	Active	Yes	380	2 🛓 💼
- All Agencies -	Yes	Active	Yes	10	2 🛓 💼

You can

If you choose to add fields from existing forms, the following forms are available:

- Incident Offender
- Incident Victim Person
- Incident Offense
- Field Arrest
- Field Contact
- Case
- Warrant
- Citation
- Field Arrest Vehicle
- Incident Header
- Calls For Service
- Impound
- Court Paper

- Fleet Vehicle
- Case Activity
- Criminal Complaint
- 2. Click the appropriate ^Q Add...Fields link to open a page similar to the one shown.

Form Administration / Custom Fields / Add Custom Fields	
SELECT AN AGENCY TO ADD CUSTOM FIELDS FOR	Go Back
ANGTESTAGENCY	•
Create Fields	

- 3. Select an agency from the drop-down list if not already populated.
- 4. Click **Create Fields** to display a page similar to the one shown.

				Exit Form Editor
Field List	Designer	Code Tables	Status	
				Add Fields

5. Click the ^{CD} Add Fields link to open the Add Fields page as shown.

			Go Back Add Another Field
FIELD TYPE		LABEL	FIELD ID
-Select-	~		
REQUIRED		DISPLAYED	
		\checkmark	
HELP TEXT			
		Remove Field	
		Save	

- 6. Complete the fields and select appropriate buttons and click Save.
- 7. Click Add Another Field to add another field, if needed.

Note: If you want to remove the newly added field, click the **Remove Field** button.

- 8. Repeat Steps 6 and 7 until you have added all the fields needed.
- 9. Click Go Back to return to the previous page and click Exit from Editor.
- 10. Optionally click the **Designer** tab to open the Form Designer. This is used to position the fields on the form. For more information on the Form Designer, refer to "Designer Tab" on page 260.
- 11. Optionally click on the **Code Tables** tab to add a code table.
- 12. Click on the Status tab to activate or inactivate the form.
- 13. Click Exit form Editor to return to the *Qustom Fields* home page.
- 14. Click Go Back to return to the Form Administration page.

Upload Custom Fields

1. From the Form Administration page, click the Manage Custom Fields link to open the *Custom Fields* page.

Form Administration / Custom Fields								
					Go Back			
Incident Offender Fields O Upload Custom Fields								
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions			
ANGTESTAGENCY	No	Inactive	No	0	C 🛓 💼			
District 16, Peru - GA	Yes	Active	Yes	6	2 🛓 💼			
- All Agencies -	Yes	Active	Yes	196	C 🛓 💼			
District 42, Versailles	Yes	Inactive	Yes	396	2 🛓 💼			
A_standalone Pd	No	Inactive	No	0	2 🛓 💼			
All Other	No	Inactive	No	0	2 🛓 💼			
Incident Victim Person Field	ls		0	Add Incident Victim Person Fi	elds 🕒 Upload Custom Fields			
Agency	Publish Status	Active Status	Report Exists	# of Instances	Actions			
District 42, Versailles	Yes	Active	Yes	317	C 🛓 💼			
- All Agencies -	Yes	Active	Yes					
		Active	Yes	144	C 🛓 💼			
Indiana State Police	No	Inactive	No	0	2 ± 0 2 ± 0			
Indiana State Police Incident Offense Fields	No			0				
	No Publish Status			0				
Incident Offense Fields		Inactive	No	0 Add Incident Offense Fi	elds 🗢 Upload Custom Fields			
Incident Offense Fields Agency	Publish Status	Inactive Active Status	No Report Exists	O Add Incident Offense Fi # of Instances	elds 🔹 Upload Custom Fields			

2. Click the ^Q Upload Custom Fields link to open the Upload Form.

orm Administration	
elect a File	Go Back
Choose File No file chosen	
Upload	

- 3. Click **Browse** to the right of the **Select a File** field to open the *File Upload* window with your local directories.
- 4. Navigate to the folder containing form design documents.
- 5. Click to select a file and pull the path into the Select a File field.
- 6. Click **Upload** to upload the file and open the *Form Resource Review* page. Fleet Vehicle fields are used for illustration purposes, but the same general process applies to other areas.
 - a. If the Field IDs in the uploaded document match fields that already exist, then enter new **Field IDs** by entering new **Updated Value** values.
 - b. If no duplicate Field IDs are found in the uploaded document, a *No Duplicate Field Values Found* message appears.
- 7. Click the **Continue to Preview** button to open the Add Fields page
- 8. Select an Agency then click the Create Fields button to open the normal Field List screen.
- 9. Add more fields or click on the *Designer* tab to place the new fields on the form. For more information on the *Designer* tab refer to "Designer Tab" on page 260.

Manage Form Code Tables

Use the following procedure to manage form code tables.

1. From the *Form Administration* page, click the <u>Manage Form Code Tables</u> link to open the *Code Tables* page as shown.

Form Administration / Form Code Tables								
								Go Back
						O Ac	dd Co	de Table
Show 10 ¢ entries			Searc	h:				
Table	1 ⊥	Description			îĻ	Actio	ns	
_CS_AIRCRAFT_OWNER_CODES								ľ
_CS_AIRCRAFT_TYPE_CODES								ľ
_CS_ANGTESTCODE								
_CS_ANIMAL_DEST_CODES								ľ
_CS_ANIMAL_DOMEST_CODES								
_CS_AREA_SUB_TYPE_CODES								ľ
_CS_AREA_TYPE_CODES								
_CS_ATTN_LIST								
_CS_BACKSTOP_TYPE_CODES								ľ
_CS_CHECK_FLAG		Check for flag						
Showing 1 to 10 of 152 entries	Pre	evious 1 2	3	4	5		16	Next
Go Ba	ck							

- 2. Add a Code Table.
 - a. Click the Add Code Table link to open the Code Table page as shown.

Form Administration / Form Code Tables / Code Table	
	Go Back
Code Table Details	
Table Identifier ()	
DESCRIPTION	
SORT ALPHABETICALLY When checked, the codes will be sorted alphabetically regardless of how you enter them.	
Codes	• Add New Code
Save	

- b. Complete the fields and select the Sort Alphabetically button if applicable.
- c. Click the Add New Code link to open fields to enter a new code and its label.
- d. Complete the **Code** and **Label** fields then repeat until you have added all the codes you want for this table.
- e. Click **Save** to save the new table and return to the *Code Tables* page.

3. To locate a code table, use the page buttons at the bottom of the page, or use the Search text box.

Previous

4. To edit a code table, click the edit icon in the Actions column.

			Go Back
Code Table Details			
TABLE IDENTIFIER ()			
_CS_AIRCRAFT_OWNE	R_CODES		
DESCRIPTION			
SORT ALPHABETICALLY W	hen checked, the codes will be sorted alphabetica	lly regardless of how you enter the	m.
Codes			Add New Code
CODE	LABEL	ACTIVE	
ST	State		ā
51	State		
CODE	LABEL	ACTIVE	
САР	CAP	\checkmark	Ö
1			_
CODE	LABEL	ACTIVE	-
DEA	DEA/Customs	\checkmark	Î
CODE	LABEL	ACTIVE	
		\checkmark	-
OTH	Other	\mathbf{v}	a
ОТН	Other	V	ā

- Make changes to existing codes or add new codes (refer to "Add a Code Table." on the previous page)
- b. Click **Save** to save changes.
- c. Click Go Back to return to the Code Tables page.
- 5. Click Go Back to return to the Form Administration page.

Form Delete Log

Deleted form activity is written to the **Form Delete Log** table automatically with the form title, date it was deleted, comments, and the user who deleted the form.

Note: This table is read-only.

Use the following procedure to access the Form Delete Log table.

1. From the *Form Administration* page, click the <u>Form Delete Log</u> link to open the *Form Delete Log* page as shown.

				Go Ba
Form Delete Audit			Search:	
Title	# of Instances	Date Deleted	Comment	User
Fleet Vehicle Fields	0	07/02/2018 1732	0	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1642	0	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1639	0	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1636	0	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630	0	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630	0	Joe Friday
Fleet Vehicle Fields	0	07/02/2018 1630	0	Joe Friday
SuperHeroes	1	03/06/2017 1600	0	Homer Simpson
Ang Test	0	03/06/2017 1600	0	Homer Simpson
SuperHeroes2	0	03/07/2016 1324	0	Homer Simpson
howing 1 to 10 of 17 entries	5		Previo	ous 1 2 Next

2. Hover over or click on the blue information bubble for addition information.

07/02/2018 1630	0	Joe Friday
07/02/2018 1630	0	Joe Friday
test	79	Joe Friday
Click to view Entire Entry	0	Homer Simpson

Form Editor

The Form Editor opens as shown below, displaying the **Form Details** tab, when you save a new form.

			Exit Form Editor	Preview
Form Details Field List Designer Reports Code Tables	s Rout	ting Status		
PUBLISH STATUS		Active Status		
Not Published		Inactive		
Тпіє				
Ang Test Custom Form 3				
Ang Test Custom Form 3				
PRINT HEADER				
Ang Test Custom Form 3				
RESTRICT TO AGENCY				
Click To Select				
DEFAULT SECURITY LEVEL		OFFICER ENTRY		
Patrol Supervisor	~	Officer is Required		~
REVIEW REQUIRED		RESTRICT EDIT		
\checkmark		\checkmark		
Roles				
× CASE_SUPERVISOR				
FORM TYPES				
× Vehicles				
Form Admins 😧				
				e
SELECTED FORM ADMINS Double Click To Remove				
RESTRICT VIEW ACCESS USERS				
SELECTED USERS Double Click To Remove				
	Sav	/e		

The Form Editor also displays when you select a form to edit from the *Manage Forms* page after accessing it from the *Form Administration* page.

Note: The only field that cannot be changed once a custom form is published is the **Restrict to Agency** field. All other fields may be modified as long as the form's status is set to *Inactive*.

The Form Editor has seven tabs:

• The **Forms Details** is shown above. It opens upon initial creation of a form when a user saves a new form from the *Add Form* page. It also allows users to change form details after a form has been created.

- The **Number Generation** tab allows the user to configure number generation formats much like the number generation in other modules in Edit Agency. It also allows the user to enable or disable automatic number generation for custom forms. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens. This number is unique to each customer form.
- The **Field List** tab displays a list of custom fields to be used on the form. From this tab, you can add additional fields and edit existing fields.
- The **Designer** tab is used to position the fields on the form.
- The **Reports** tab is used to specify a report for a form type with which the form is associated, including Incidents, Field Arrests, and Contacts.
- The **Code Tables** tab displays a list of Code Tables that the form uses.
- The **Routing** tab is used to specify the who, what, where, and when of form routing details. It also has a setting to allow the creation of an incident during the review process.
- The **Status** tab is used to publish and activate/deactivate forms. The current status of a form is always displayed on this tab.

Click on the Exit Form Editor button on the top right to exit the form editor at any time.

Form Details Tab

The **Form Details** tab of the Form Editor is used to manage the form title, define what prints as the header on the printed copy, manage form security, require review, and more.

Use the following procedure to complete the information on the Form Details tab.

- 1. Enter a unique **Title** for the custom form.
- 2. Optionally, enter a **Description**. This displays to users who are viewing or editing an instance of this form.
- 3. Optionally, enter the **Printer Header**. This appears on the top of the first page when printing this form.
- 4. Optionally, **Restrict To Agency**. Leave blank, or select as many as needed.
- 5. Select the Default Security Level from the list provided.

- 6. Select the Officer Entry from the list provided.
- 7. Optionally, check the **Review Required** box. A notification appears in a yellow box at the top of the *Submit for Review* page requesting a user review a PDF copy of the form before the creator submits it.
- Optionally, check the **Restrict Edit** box to restrict the creator of an instance of this form from putting it back into edit mode once it has been approved and finalized. Only a user with special permissions is allowed to do so.
- 9. Select one or more Roles.
- 10. Select one or more Form Types.
 - **Note**: If you wish to use this form without having to attach it to a specific record, select **Freestanding Forms** from this list. This allows users to add new instances of this form in the Forms & Report page.
- **11.** Optionally, select **Form Admins**. Users added to this list can administer this form regardless of agency.
- 12. Optionally, select **Restrict View Access Users**. Only users added to this list can view, print, and search on this form.
- 13. Click Save.

Number Generation Tab

The **Number Generation** tab of the Form Editor is used to configure number generation formats (a unique number) much like the number generation in other modules in Edit Agency, or to enable or disable automatic number generation. When enabled, a new Instance Number field containing the generated number displays on the view and edit screens.

Enable Number Generation

Use the following procedure to enable number generation.

1. From the Form Editor, click on the **Number Generation** tab.

								Exit Form Editor
Form Details	Number Generation	Field List	Designer	Reports	Code Tables	Routing	Status	
				Enable Nun	nber Generation	n for this for	m	
					Save			

2. Check Enable number Generation for this Form to display additional fields.

Form Details	Number Generation	Field List	Designer	Reports	Code Tables	Routing	Status
				Enable Num	1ber Generatio	n for this fo	rm
Format					Nex	T NUMBER	
YYYYIR000					▼ 1		
PLACE HOLDER					EFFI	CTIVE DATE	
CF					1)/21/2020	
END DATE							
					曲		
					Save		

a. Select a Format from this list.

Note: If the format you want is not listed, refer to the Number Generation tab of "Agency Profile" on page 17.

- b. Enter the **Next Number**; the beginning number of this series of number. For example, if you want the beginning number to be 1, enter 1.
- c. Enter the **Place Holder**. It could be letters or perhaps a hyphen (-). For example, if the number format you are using is YYYIR000 and place holder is CF, then CF replaces the IR in the format.
- d. Select the Effective Date.
- e. Select the End Date, if applicable.
- f. Click Save.
- **Note:** When Number Generation is enabled, a read-only field with the name **Instance Number** appears on the form containing the auto-generated number upon saving the form.

Note: The Instance Number also prints on standard Custom Form printouts.

Disable Number Generation

Use the following procedure to disable number generation.

- 1. From the Form Editor, click on the **Number Generation** tab.
- 2. Uncheck Enable Number Generation for this form.
- 3. All formatting fields no longer appear.
- 4. Click Save.

Field List Tab

The **Field List** tab of the Form Editor is used to create fields to be used on a custom form.

Public facing forms support the following Custom Form Field Types:

- Date
- Date & Time
- Text Single Line
- Text Multiple Line
- Checkbox
- Radio Buttons
- Select LOV Single Value
- Auto Complete

For more information on *Public facing forms*, refer to "Community Reporting with Custom Forms" on page 272.

Use the following procedure to set up fields for a form. Keep the above in mind if you are creating a *Public facing form*.

1. From the Form Editor, click on the **Field List** tab to display the **Name Form**.

													Exit For	m Editor	Previe
Form Details	Field	List	Designer	Reports	Cod	e Tables	Routin	g Status							
														🔁 Ade	d Fields
Show 100 \$	entri	es										Search:			
Field ID	†↓	Label	ţ1	Field Type	e îl	Position	ied î∔	Required	î1	Displayed	ţ1	Comment	11	Actions	11
RANDOM_FIE	D	Rando	m Field	Text - Sing	gle Line	Yes		No		Yes		Don't Specify C	omment	Ľ	Î
Showing 1 to 1	of 1 e	entries											Previou	is 1	Next

Note: You also open this page when you save a new form on the *Add Form* page, but the list is empty for a new form.

2. Click the <u>Add Fields</u> link to open the *Add Fields* page as shown in the following examples.

FIELD TYPE	LABEL		FIELD ID	
-Select-				
REQUIRED	DISPLAYED		Comment	
			Don't Specify Comment	~
DISPLAY IN ADDITIONAL DETAILS				
HELP TEXT				
				1.
		Remove Field		
		Save		

- 3. Type values in the Label field and select to complete the Field Type field.
 - **Note:** Additional parameters may appear based on the chosen Field Type. For example, if you select the Field Type *LOV*, the required field **Field Code Type** appears and the user must select a value. You may flag a field on a custom form and have it displayed as an additional detail when the custom form is displayed in various tables throughout the application. These pages include My Forms (initial and rejected), Forms for Review, Form Search Results, and Notifications. Sub Form fields cannot be set as additional details.
- 4. Enter a value in the Field ID.
- 5. Check the **Required** box if this field is to be a required field.

- 6. Check the **Displayed** box if this field is to be displayed on the form on screen.
- 7. Select a Comment.
- 8. Add content to the **Help Text** box if you want to provide instructions about completing this field.
- 9. You can also perform the following tasks:
 - Click the <u>Add Another Field</u> link to add additional fields so that you can quickly add multiple fields without having to leave the page.

		Go Back Add Another Field
FIELD TYPE	LABEL	FIELD ID
-Select- 🗸		
REQUIRED	DISPLAYED	COMMENT
	\checkmark	Don't Specify Comment 🛛 🗸
HELP TEXT		
	Remove Field	
FIELD TYPE	LABEL	FIELD ID
FIELD TYPE -Select-	LABEL	FIELD ID
	DISPLAYED	FIELD ID COMMENT
-Select- 🗸		L
-Select- 🗸	DISPLAYED	COMMENT
-Select- REQUIRED	DISPLAYED	COMMENT
-Select- REQUIRED	DISPLAYED	COMMENT
-Select- REQUIRED	DISPLAYED	COMMENT

- Click Remove Field to remove a field.
- When the required fields have been filled out and all the information is correct, click Save to save the new custom fields.
- 11. The **Field List** tab displays with the new field listed which has **No** displayed in the **Positioned** column.

Form Details Field L	ist Designer	Reports Co	ode Tables	Routing	Status				
								🔁 Ade	d Field
Show 100 \$ entrie	s						Search:		
Field ID 1	Label î↓	Field 1↓ Type	Positione	d 11	Required 1	Displayed 🕦	Comment 🐴	Actions	ţţ
ADDCOMMENT	Additional Comment	Text - Single Line	No		No	Yes	Comment Optional	ľ	Î
random_field	Random Field	Text - Single Line	Yes		No	Yes	Don't Specify Comment	ľ	Î

Designer Tab

The fields that were set up on the **Field List** tab are positioned and sized on a form using the **Designer** tab of the Form Editor. The **Designer** tab allows you to layout a form using a drag/drop user interface.

- Use the Position Mode to design the visual layout of a form.
- Use the Resize Mode to adjust the position and size (width) of fields in a row based on a percentage of the total form width.

Use the following procedure to position fields on a form.

- 1. From the Forms Editor, click the **Designer** tab to open it.
- 2. Click the <u>Launch Form Designer</u> link to display the form designer page as shown in the example.

D42 Test Form	Controls	Available Fields
Random * • 0	EditInde Cestion Mode Add Section Remove Empty Areas	Ladditional Comment

Note: This page does not adjust to the size of the browser window. Scroll to the right to see the **Available Fields** list.

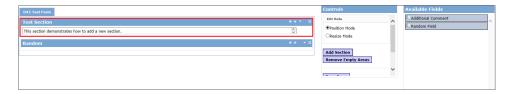
Controls	Available Fields
Edit Mode	I Additional Comment
Position Mode	I-Random Field
OResize Mode	
Add Section Remove Empty Areas	

You can drag and drop the **Controls** pane and the **Available Fields** list anywhere on the screen. For example, you might want to drag the **Available Fields** list so that it is located below the **Controls** to make it easier to see all the elements of the screen at once. However, should you close the Form Designer then reopen it, the elements appear in their default positions once again.

3. Click Add Section in the Controls pane to display the Section Details window as shown.

Section Details	×
Name:	
Section Help Message [Edit Page Only]:	
	Cancel Save

4. Type a name for the section in the **Name** field and a **Section Help Message**. Click **Save** to redisplay the page as shown in the example.



- 5. Adjust a section as follows:
 - Click + in the far right of the new section to add a row, then drag and drop one or more fields into the row.
 - Click X to remove a section.
 - To delete a row from a section, click **X** in to the left of the row in the left margin of the section.

- Rows can hold multiple fields horizontally; however, if you want to add fields vertically, you must add another row.
- Both sections and rows can be repositioned. Use the drag and drop method or the up and down arrows.
- 6. Repeat Steps 3 through 5 to add and adjust as many sections as you need for the form.

Note: You can remove empty sections if you decide you need fewer sections. You can move sections and/or fields as needed by dragging and dropping, and you can revert at any time to return to the form to the state it was at the time you last saved.

7. Click **Save Form** at any time to save the work you have. If the form is not complete, a *Design Validation* box appears giving you the option to save or cancel your design.

Design Validation
Your form is incomplete. You may still save it, however you will not be able to activate it until you fix the following:: You Have Fields that are Not Positioned You have empty sections
Cancel Save Anyways

- It is important to save often to avoid losing work.
- If needed, the **Revert** button allows you to return the form as it was the last time you saved.
- The **Save Form** button label displays in red if any changes have been made since the last save.
- 8. Click the **Resize Mode** radio button and adjust the horizontal alignment of fields as needed.

Fields appear where you can enter alignment values. The values in each box represent a percentage of the total form width. To increase the width of a field or label, type a higher number in the box; to decrease the width of a field or label, type a lower number.

- 9. When you think the form is complete, save and click **Exit Designer** to return to the **Designer** tab of the Forms Editor.
- 10. Click Preview to review your form.

- Use the Switch to... button to toggle between View Mode and Edit Mode.
- Click the **Print** button to open a pdf version of the form to see it as it will appear when printed.
- If the form needs changes, click **Exit Preview** then click the <u>Launch Form</u> <u>Designer</u> link to display the form designer page again where you can make changes.

Reports Tab

The **Reports** tab of the Form Editor is used to specify a report for any Form Type with which a form is associated. Form Types include Incidents, Field Arrests, Field Contacts, and Vehicles. Available options are based on Form Type selections made on the **Form Details** tab. Multiple types may be associated with a form simultaneously.

You have the ability to generate form letters and reports by integrating fillable PDFs.

Use the following procedure to download .jrxml template files.

1. From the Form Editor, click the **Reports** tab to open it.

								Exit Form Editor Pre
orm Details	Field List Designer	Reports	Code Tables	Routing	Status			
For each type t	this form is associated	d to, you may	/ specify report	ts for it.			🛓 Generate	Domain for ALL form type
Cases								
		🛓 G	enerate Domai	n for Cases	🛓 Get Cases I	Report Template	Create New Cas	ses 🚯 Upload Fillable PE
Citations								
	4	Generate D	omain for Cita	tions 🛓 Ge	t Citations Rep	ort Template	Create New Citatio	ons 🚯 Upload Fillable PE
Court Papers								
	🛓 Generate D	omain for C	ourt Papers 🛓	Get Court I	Papers Report	Template 🤂 Cr	eate New Court Pape	ers 🚯 Upload Fillable PE
ield Arrests								
	🛓 Generate	Domain for	Field Arrests	🛓 Get Field	Arrests Report	Template C	reate New Field Arre	sts 🚯 Upload Fillable PE
ield Contacts								
	🛓 Generate Dom	ain for Field	Contacts 🛓 🤇	Get Field Con	tacts Report To	emplate 🚯 Cre	ate New Field Conta	cts 🚯 Upload Fillable PE
	rms							
reestanding Fo	1113							

Report Types that were selected on the Form Details tab are reflected here.

- **Note**: The link titles that appear in blue vary and may not appear exactly as shown in the example.
- 2. Use the <u>Get...Report Template</u> links to download .jrxml template files of the selected association types. Once they are downloaded you can save the templates then edit them as needed.
- 3. Optionally use the <u>Upload Fillable PDF</u> link to locate and upload an existing fillable PDF file that has at least one fillable field on it.

Note: The agency is responsible for procuring the appropriate PDF license that supports the creation of fillable PDFs.

• Click Browse to locate the PDF file, then click Upload.

	Go Back
 The uploaded PDF cannot have any security The uploaded PDF must have at least one fillable field 	
SELECT A FILE	Browse
Upload	browse

- Enter a report **Name** and select **Default** to display this report on the Custom Form for users to print. Multiple fillable PDFs can be associated to one Custom Form. If only one PDF exists, it prints by default regardless if the **Default** option is checked.
- Click the Add Field link to map the Custom Form fields to the Fillable PDF fields.

Edit Filla	ble PDF	Go Back
Name: Lett	er 1 Default: 🖉	⊕Add Field
Address Address Letter Date Name	View The following options are available for this field. Leave this blank for the default value ADDRESS - Acdress ADDRESSLINE - Address Line 1 ADDRESSLINE - Address Line 2 ACF - Age CELLPYONG - Call Phone CELLPYONG - Call Phone DL - Drivers Liense EVECOLOR - Fyr Color FirstNAME - First Name SEX - Gender SEX - Gender HEIGLENF - Height HEIGLENF	
	• SSN - SSN • WEIGHT - Weight • WORKPHONE - Work Phone	sc

A Format String (Token) can be entered for how the data should print, or leave it blank for the default.

For example, for a person the string {FULLNAME} {DOB} could be specified. Labels may also be included by entering the string {TOKEN| Optional label}.

Click on the Blue Info Bubble to view available format options.

Note: Tokens are case sensitive.

4. Optionally use the individual <u>Generate Domain for...</u> links to select the fields on which to report.

Note: Click the <u>Generate Domain for ALL Form Types</u> link to generate them all at once.

Optionally select agencies on the Configuration tab to include in the report. If no
agencies are selected, the report includes all agencies.

Go Back
Configuration D42 Test Form
Select which fields you would like to report on. The page is organized based on the form and sub forms. One tab will be displayed for the main form, and a tab for each sub form will be displayed.
For fields which have comments enabled, you may also choose to report on the comments.
For more complex fields such as master index people, you will have to select exactly which information you want displayed.
Important things to remember
 The more fields you select, the slower the report can get. Only select what is absolutely needed. Remember you can create multiple domains for the same form. The domain created will only be valid for this schema you are currently in. If you want to create a domain for the exact same form in a different schema, you will have to log into the RMS on that schema and repeat this process
Below you may select which agencies will be reported on. If selected, the domain will be restricted to only these agencies forms.
RESTRICT TO AGENCY
× Ang Police Department × Indiana State Police
Generate

• Click on the second tab and select the fields to include. The title of the second tab is the title you gave the report.

				Go Back
Configuration	D42 Test Form			
Additional Co	omment			
Include Cor	nments			
Random Field	ł			
		_	_	
		Gene	rate	

• Click Generate to generate and download an XML file.

- In the pop-up window click **Save** to save the XML file to your computer or network, or click **Open** to view the file.
- Click **Go Back** to return to the previous window.
- 5. Use any Create New... link to open the Add Report page as shown.

Add Report	Go Back
Report Details	
Report Type:* Custom Form Report Report Name:* Description:	
Report Association Details This report will be associated with the D42 Test Form custom form.	
Save Go Back	

- The **Report Type** field always has the value *Custom Form Report*. This field value cannot be changed.
- The **Report Name** field is for a name of your choosing used to differentiate between multiple reports of the same report type.
- The **Description** field allows you to add a description to define the report's purpose.
- At the bottom of the page is a reminder of the form with which this report is associated.
- 6. When you have completed the fields, click **Save** to open the *Edit Report* page as shown in the following example.

Add Report	Go Back
Report Details	
Report Type:* Custom Form Report Report Name:* October Incidents Description: This is a list of incidents reported in October 2018.	
Report Association Details	
This report will be associated with the D42 Test Form custom form.	
Save Go Back	

7. If needed, make changes and click Save.

8. Click **Exit** to return to the Form Editor as shown in Step 1 with the new report listed in the appropriate grid.

Code Tables Tab

The **Code Tables** tab of the Form Editor is used to list code tables used by the form for specified lists of values (LOV) fields, or pick lists, fields and to add code tables.

Use the following procedure to add and edit code tables associated with a form.

1. From the Form Editor, click the **Code Tables** tab to open it.

							Exit Form Editor Preview
Form Details	Field List	Designer	Reports	Code Tables	Routing	Status	
							Add Code Table

If the form has been set up to use one or more code tables for LOVs fields, the tables are listed here. The **Code Table ID** and, if entered, the **Description** of each

table display, and the edit icon in the Actions column provides the ability to edit the table.

- 2. To add a custom code table, continue as follows:
 - Click the Add Code Table link to open the Code Table page as shown.

Go	Back
Code Table Details	
TABLE IDENTIFIER (
DESCRIPTION	
SORT ALPHABETICALLY When checked, the codes will be sorted alphabetically regardless of how you enter	r them.
Codes	
Save	

Complete fields as follows:

- Table Identifier Enter a label to assign to the code table to differentiate it from other code tables. This label must be all upper case alpha-numeric characters with no spaces. Underscores are allowed. _CS_must be added to the label as a prefix to conform to the naming convention for code tables. Note: This is a required field, and the record is not saved properly without a valid label.
- **Description** Enter a description of the custom code table.
- **Sort Alphabetically** Check the box if you want codes to be sorted alphabetically regardless of how they are entered.
- Click Save.
- 3. To add a code to the table, continue as follows:
 - Click <u>Add New Code</u> to open a Code field, a Label field, an Active box and a delete icon across the bottom of the page as shown.

				Go Back
Code Table Details				
TABLE IDENTIFIER				
DESCRIPTION				
SORT ALPHABETICALLY When checked	l, the codes wi	ill be sorted alphab	etically regardless of how yo	u enter them.
Codes				Add New Code
CODE	LABEL	\leftarrow	ACTIVE	
			\checkmark	Ē
		Save		

- Complete the Code and Label fields.
- Click Save.
- 4. To edit a code table, click in the Actions column (see example in Step 1 above) to display the *Code Table* page.

Note: Code tables can be used by more than one form. A list of forms that use this code table display in the yellow banner in the middle of the page.

5. Continue as follows:

- Make changes to any field or box except the **Table Identifier** field. To change this value, you must delete the table and start over.
- Use the delete icon to delete any unneeded codes.
- Click <u>Add New Code</u> to add a new code. (See Step 3.)
- When changes are complete, click **Save**.

Routing Tab

Custom forms can be routed in a way similar to Incident Report routing. Notifications are sent to designated users, roles, and/or – in a statewide organization – agencies. From the Form Editor, the administrator can set up one or more levels of routing as needed, entering comments that are included in the notifications sent to routing recipients.

Use the following procedure to set up routing for a custom form.

1. From the Form Editor, click the **Routing** tab to open the tab as shown.

								Exit Form Editor Preview
Form Details	Number Generation	Field List	Designer	Reports	Code Tables	Routing	Status	
🗌 Enable Routi	ng For This Form							Save

2. Check the **Enable routing for this form** box to enable and display the tab as shown.

								Exit Form Editor Preview
Form Details	Number Generation	Field List	Designer	Reports	Code Tables	Routing	Status	
🗹 Enable Routi	ng For This Form				•			Add Level Save
	Use this screen to add	/edit as mar	ny route level	s as you wo	uld like. When	you are done	e, click the s	ave button
Name	Options	A	gencies		Roles	Users		Actions
			N	o Levels To S	Show			

Note: If routing is not enabled for a form, review submission is not required.

Note: With Online RMS 11.5 and higher, multi-tier routing has been added to route a form through multiple levels of review.

3. Select the Add Level button on the right to open the Route Level form.

ieneral Route Options		
NOTIFICATION TEXT		
Level 2		
Require Comment On Submission Disable Addition of Users Disable Removal of Users Disable Addition of Roles Disable Removal of Roles Disable Removal of Roles User May Concerned User may cancel next level (Does not apply to the second seco	o first level)	
ser Route Options		
NDD User		
ELECTED USERS Double Click To Remove		
ELECTED USERS Double Click To Remove		
ELECTED USERS Double Click To Remove		
ole Route Options		
ole Route Options		
ole Route Options		

- 4. In the General Route Options section:
 - a. Check the **Require Comment On Submission** box if you want to require a comment when the user summits it.
 - b. Check the **Disable Addition of Users** box if you want to prevent users from adding additional users.
 - c. Check the **Disable Removal of Users** box if you want to prevent users from removing users.
 - d. Check the **Disable Addition of Roles** box if you want to prevent users from adding additional roles.
 - e. Check the **Disable Removal of Roles** box if you want to prevent users from removing roles.
 - f. Check the **Require One User** box to require the selection of a user at time of route generation.

- g. Check the User may not cancel next level (Does not apply to first level) box if you do not want users to cancel the next level.
- 5. In the User Route Options section, specify which users are to receive notifications. Click into the Add User box and begin typing a user's name, then select the appropriate user from the list. The selected user appears in the Selected Users box automatically. Double-click on a Selected User to remove them from the selected list.
- 6. In the **Role Route Options** section establish which users are to receive notification by role.
 - a. Choose Roles.
 - a. Choose Agencies.
 - **Note:** Statewide organizations also have the ability to choose route to specific agencies. If no agency is selected, the form automatically routes to the form creator's agency.
- 7. Click **Ok** to add the route to the Routing tab.

Form Details	Number Generation	Field List	Designer	Reports	Code Tables	Routing	Status		
🗹 Enable Rout	ing For This Form								Add Level S
	Use this s	creen to add	l/edit as mar	y route leve	els as you wou	ld like. When	n you are done	e, click the save button	
Allow Cr	eate Incident During	Review Pr	ocess (Only	Applies to	- Freestandi	ng Forms)			
Name	Options		Agencies		R	oles		Users	Actions
Level 1	Comment Required: Ye Disable Add: No Disable Remove: No Can Cancel: No	es	District 21, T District 42, V		0	A_CLERK FICER	RVISOR	Benjamin (cid) Harrison Ralph Lauren	ß

Note: Clicking **Ok** creates your route level only. To save your changes to the database, you must also click the **Save** button when finished adding route levels.

- 8. Optionally, click the Add Level button again to add an additional level, and repeat until all desired levels are complete.
- 9. Optionally, check the Allow Create Incident During Review... checkbox.



Checking this box allows users with appropriate permissions to create an incident during the form review process.

10. Click Save to commit your changes to the database.

Status Tab

From the Form Editor, click the **Status** tab to open it. The **Status** tab is used to publish and activate the form. Current status of the form is always displayed on this tab. It is important that the form is 100% complete and ready to be used before publishing it because some details cannot be changed after the form has been published.

									Exit Fo	orm Editor	Preview
Form Details	Field List	Designer	Reports	Code Tables	Routing	Status					
form,	you can on	ly modify co	ertain prop Iplete befo	erties of the fo incompa re publishing!	orm and its atible with o You can pro	fields, as existing d eview the	odify the design hanges to the fi ta. form at any time me operation!	elds can resu	lt in the for	m being	
				P	ublish And A	ctivate					

The **Publish and Activate Form** button is available only if the form has not yet been published. Click it to set the Published Status to *Published* and the Active Status to *Active*.

The following buttons appear once the form has been published:



Community Reporting with Custom Forms

In response to COVID-19, Caliber Public Safety is offering a new product feature with Online RMS 11.3.2 to support **Community Reporting** of minor crimes, tips, and other police-related events. The **Community Reporting** feature leverages the power of Online RMS *Qustom Forms* for your agency to embed a public form in an existing website using only a couple lines of HTML code. With this enhancement, your agency can create their **Community Reporting** public forms using the *Qustom Forms* module and make the forms available to the public via your agency's website.

Benefits of **Community Reporting**:

- Promote social distancing by reducing officer to public interactions for minor police reports.
- Better service your community by reducing non-essential contacts to ensure 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 section provides instructions on how authorized Caliber Online RMS users administer and configure the **Community Reporting** feature.

Agency Responsibilities

The following are the responsibilities of the agency when requesting the **Community Reporting** feature and implementing *Public Custom Forms*.

- Contact your *Caliber Oustomer 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 setup.
- Agency administrators are responsible for creating and managing *Qustom Forms* or assigning privileges to other agency personnel to create and manage *Qustom 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.

Once your agency has access to the **Community Reporting** feature, follow these steps to implement *Public Custom Forms*.

- 1. "Permissions and Settings" on page 274.
- 2. "Number Generation" on page 275.

- 3. "Maintenance Values" on page 278.
- 4. "Make Custom Forms Publicly Available" on page 280.
- 5. "Add Publicly Available Forms To Your Website" on page 284.

For an example of what the implemented *Public Custom Form* looks like on the website, refer to "Sample Public Custom Form Website Display" on page 287.

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

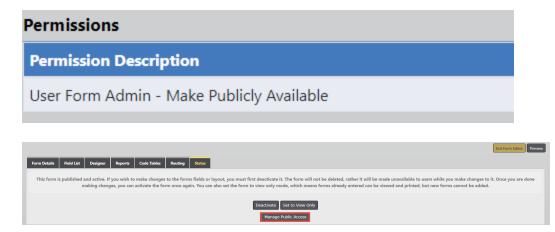
Permissions and Settings

There are two permission categories for public form access and management:

- User Form Admin Make Publicly Available
- User Forms Create Incident Form From

User Form Admin - Make Publicly Available

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



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

Note: For more information on Permission Categories, refer to "Permission Categories" on page 175.

Note: For more information on Roles, see "Roles" on page 77.

User Forms - Create Incident From Form

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

Permissions	
Permission Description	
User Forms - Create Incident From Form	
Approve Form Sview Form	
Comment	
CREATE INCIDENT	
	Save

Number Generation

The **Create Incident** option from publicly available *Custom Forms* requires that your agency has an active *Number Generation format* configured.

Note: For more information on the **Create Incident** option, refer to "Permissions and Settings" on page 274. If your agency <u>does not</u> have an active *Number Generation format* configured, select one of the following options to generate an incident report from a publicly available custom form:

Generate Incident Number from Online RMS (Recommended)

1. On the Number Generation tab of the Agency Profile, create a Number Generation format with **Incident** as the Type.

Note: For detailed instructions on creating a *Number Generation format*, refer to "Add Number Generation" on page 23.

2. Once configured, users see that the Report Number auto-generates when selecting **Create Incident** from a publicly available custom form.

🟚 Approve Form	Wiew Form	Attachmente
Comment		
Reviewed commun	ity submission an	d creating incident report to document offense reported
CREATE INCIDENT		
 Image: A start of the start of		
Upon Creation,	this form will be	associated with the incident. Any information entered here can be changed later.
REPORT NUMBER Auto Generated		

Manually enter Incident Number from CAD

This option is for agencies that use a CAD System to generate Incident and Case Report numbers for Online RMS.

Note: With this option, you need to request a case number from CAD or selfgenerate from Caliber Mobile.

- An additional setup is required to configure Online RMS to avoid the creation of an RMS incident report from a CAD spill. This prevents the Case number from generating an incident report in Online RMS before the officer has a chance to generate the incident report from the publicly available *Custom Form*.
 - a. In *Caliber CAD*, create a **Tracking Number Generator** for **Community Reports Submitted by the public** and configure a **Type Code**.
 - b. 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.

Note: If you need assistance, please call *Caliber Customer Support*.

- 2. In Online RMS, create a Number Generation format on the Number Generation tab of the Agency Profile, following <u>#GenerateIncidentNumberFromRMS</u> with two exceptions:
 - a. Select a **Format** that matches the **Tracking Number** format configured in *Caliber CAD*.
 - b. Enter 0 (zero) in the Next Number field.
- 3. Once configured, users are required to type the number provided from *Caliber CAD* when selecting **Create Incident** from a publicly available custom form to generate the incident report in *Online RMS*

Approve Form I View Form	
Comment	
Reviewed community submission and creating incident report to document offense	reported.
CREATE INCIDENT	
Upon Creation, this form will be associated with the incident. Any informati	on entered here can be changed later.
REPORT NUMBER OPTIONS	1
Enter a # to generate a report number for the current year	
Enter a full # in the format YY-000000 REPORT NUMBER	
REPORT INUMBER	

EJS_CODES

- CODE_TYPE = FORM_REJECT_REASON_CODES
 - Out of the box values: Bad Address

Maintenance Values

Set the Default Incident Type for Incident Reports

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 *Qustom Form*.



With appropriate permissions, you can apply settings by following these steps:

1. Click on **Administration** on the top menu, then click **Tables** to open *ESCode Tables*.



JS Code Tables	Administration -	Incidents 🔻	Maste	er Indices 🔻	Reco	rds Management 🔻	Forms A	and Reports 🔻	Help 🔻	± •	133/0 🏶 🛛
			_								Go Back
III Code Tables	RMS Tables	G System Tab	oles								
SEARCH BY			SE	ARCH							
-Select-		•	E	Enter search	text			Reset	Search		
S.NO L1	Code				١t	Description				11	Actions
1	INCCASE_OFFICER	_REASON_COL	DES			INCCASE_OFFICER_	REASON_	CODES			ľ
2	INCCASE_ACTIVITY	Y_NOTES_COD	ES			INCCASE_ACTIVITY	_NOTES_C	ODES			
3	INCCASE_OFFICER	_ROLE_CODES				INCCASE_OFFICER_	ROLE_CO	DES			ľ
4	BUSINESS_COLLAF	PSE_SRCH_COD	DES			BUSINESS_COLLAPS	SE_SRCH_	CODES			ľ
5	SEARCH_EJS_CASE	OFFICER				SEARCH_EJS_CASEC	OFFICER				ľ

There are three tabs. The Code Tables tab opens by default.

2. Select **Table Name** as *Search By*, enter **INCIDENT_TYPE_CODES** in the *Search text box*, then click the **Search** button to display the INCIDENT_TYPE_CODES list.

Code Tables	🕞 RMS	5 Tables	G Syste	m Table	s				
SEARCH BY			,		EARCH	Reset	Search		
S.NO	Lt	Code		Ļţ	Description			١t	Actions
1		MPA			Minor in Possession - Alcohol				ľ
2		MPT			Minor in Possession - Tobacco				ľ
3		OBM			Obscene Material				ľ

- 3. Locate the **Incident Type** or **Code** you want to associate with the *Public Oustom Form*.
 - a. If the Incident Type exists, make note of the Code and proceed to the next step.
 - b. If the **Incident Type** *does not exist*, and you have the proper permissions, add a new **Incident Type**, then proceed to the next step.
- 4. Enter the **Code** as a *Maintenance Value*.
 - a. Access the Maintenance Value table through the Agency Profile.

For instructions, refer to "Access Maintenance Values" on page 346.

b. Click the Add Maint Value button to open the Add Maintenance Value dialog box.

Agencies / Age	gencies / Agency Settings / Agency Maint Values										
							Go Ba	ck 🕂 Add Maint Valu			
Show 10 \$	entries						Search:				
Keyword	ti.	Value	11	Description	t1	Effective Date	†1	End Date			
					No data a	available in table					

c. In the *Add Maintenance Value* dialog box, select the **Keyword** *FORM_INCIDENT_ DEFAULT_TYPE*, and enter the Code as the **Value**.

Add Maintenance Value	
Keyword	Application
-Select-	·
Module	EFFECTIVE DATE
VALUE	
	Cancel Save

d. Click Save.

Make Custom Forms Publicly Available

Community Reporting leverages the power of Online RMS *Custom Forms*, allowing agencies to create and manage their publicly available forms.

Follow these steps to make *Custom Forms* publicly available:

1. Create a *Custom Form* containing fields you wish to present to the public.

For more information on *Qustom Forms*, refer to "Custom Forms" on page 237.

Publicly Displayed Data

In addition to *Custom Form* data fields, the following appears on the agency's web page when the *Custom Form* displays to the public:

- Custom Form **Title** and **Description** fields from the *Form Details* tab.

Form Details	Field List	Designer	Reports	Code Tables	Routing	Status			
PUBLISH STATE	JS				ACTIVE ST/	ATUS			
Published					Active				
TITLE									
Online Police	Self-Reportir	ng Form							
DESCRIPTION	9								
	DESCRIPTION O 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								

- Help Text for each Field Type.

FIELD TYPE Text - Single Line	LABEL Best time of day to be contacted	FIELD ID SELF_CRIME_BEST_TIME	
Required	Displayed		
HELP TEXT			
	Update		

- Form Section Groups from the Designer tab.

Questions		× + -	G
K.	Do you know that filing a false police report is a crime?	Test2 Test3	
	Are you eighteen (18) years of age or older? <a>Test1	Test2 Test3	
	Did the incident occur within the City limits? \bigcirc_{Test1}	○Test2○Test3	
	Do you know who committed this crime? OTest1	Test2 Test3	
1	If yes, provide any known suspect information		
	Choose One	Test2 Test3	

- 2. Configure Default Security Level, Roles, and Form Types on Form Detailstab.
 - a. Set the **Default Security Level** at a level equal to the lowest level of the user security you want to access the form.

DEFAULT SECURITY LEVEL	
Patrol Officer	•

b. Set the user **Roles** that will have access to view the *Public Qustom 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.

Roles Q		
× OFFICER	× OFFICER_SUPERVISOR	

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



- 3. Configure Routing on the Routing tab.
 - a. Check the Enable Routing for this form checkbox.

Form Details	Field List	Designer	Reports	Code Tables	Routing	Status	
Enable routing for this form							

b. The **Routing Options** checkboxes <u>do not apply</u> to publicly submitted forms. Checking these do not have an impact on publicly available *Custom Forms*.



c. Select **User Routing Options**. Select individual users to notify when a public form is submitted.

Jser Routing Options			
Add User			
SELECTED USERS Double Click To Remove			
Benjamin (cid) Harrison Ralph Lauren	*		
	-		

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

Role Routing Options	
Roles	
* LEA_CLERK * LEA_RECORDS_MGMT * OFFICER * OFFICER_SUPERVISOR	

e. Select Agencies.

Leave blank to route to the agency defined on the Token for the public available *Qustom Form* (recommended).

Add an agency if you wish to route to a different agency than designated on the Token for the public available *Qustom Form*.



- 4. Configure Manage Public Access on the Statustab.
 - a. Select the Manage Public Access button.

Note: This button only appears for users having a role with the *User Form Admin* - *Make Publicly Available* permission.



- b. Select the Create Token button on the upper right.
- c. Select the Agency as the agency to Save for this Custom Form.

The form routes to this agency, unless a different agency is specified on the *Routing Options* tab.

d. Enter Allowed Domain(s).

This is the domain of the agency's website, where the public form is available. For example, if your website is <u>www.myagency.com</u>, you would enter *www.my-agency.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, countysheriff.com)
myagency.com
Cancel

- e. Click Save.
- f. A unique **Token ID Number** generates for the agency and form combination upon saving.
- g. Copy the Token by using your mouse to highlight the Token, then pressing Ctrl + C keys on your keyboard at the same time.

Agen	ncy	Token
Calib	er Public Safety PD	a21e1d1d-e578-4fe1-a57a-ed7868173b46

h. For **multi-tenant sites or agencies** configured as an Organization with subagencies, the same *Qustom Form* can be made publicly available on different websites or web pages within the same website to route public submissions of the form to various agencies.

Select the **Create Token** button and enter the information to generate a unique Token for each agency and website/page combination, then enter the Token on the appropriate web page.

When the public completes and submits the form from your website, a *Qustom Form* submission generates 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

5. When finished with the *Custom Form*, click on the *Status* tab and select the **Activate** button.



- **Note:** *Public Qustom Forms* are <u>not</u> accessible from your website until the form is activated.
- **Note:** If a *Public Qustom Form* is <u>not</u> 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?

Add Publicly Available Forms To Your Website

Community Reporting easily displays within your agency's existing website, creating a consistent online experience for your community to submit report online. **Publicly Available** *Qustom Forms* inherit the look and 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 your website works may vary significantly from that of other agencies.

Web Page Modifications

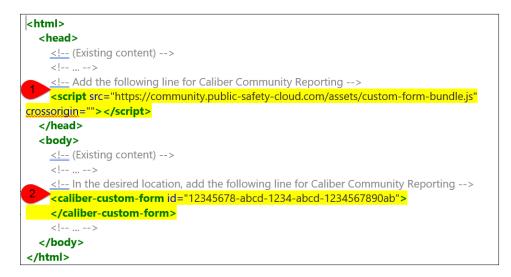
The source of an existing web page is typically structured with an invisible **<head>** section (which contains many of the needed resources, such as JavaScript and CSS), and the **<body>** section that is displayed in the end user's internet browser. **Community Reporting** requires the addition of <u>one line</u> to the end the **<head>** section, and <u>one line</u> 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**.

- The id is the Token ID generated for the *Qustom Form* in Online RMS.
- The id="12345678-abcd-1234-abcd-1234567890ab" in the <caliber-customform section must be changed to use the Token generated for your *Custom Form* in Online RMS.

For more information on the generated **Token ID**, refer to "Make Custom Forms Publicly Available" on page 280.

- The yellow highlighted lines must be added to your existing website.



1. Modification labeled 1 tells the internet browser where to find the JavaScript that displays the *Custom Form* from Online RMS.

- **Note: Do not modify the contents of this line**. Any changes to this line may cause the *Qustom Form* not to display and may break other functionality of your web page.
- 2. Modification labeled 2 identifies the location in your existing website where the *Custom Form* should display.
 - Note: You MUST update the id="12345678-abcd-1234-abcd-1234567890ab" to use the **Token** generated for your *Qustom Form*. For more information on the generated **Token**, refer to "Make Custom Forms Publicly Available" on page 280.

Display Configuration Options

There are four (4) *optional* configuration settings that can be added to the **<caliber-custom-form...></caliber-custom-form>** line.

Configuration Options	Description
hide-images= <mark>"false"</mark>	Hides the section of the form that allows the end-user to submit a JPEG image which will be attached to the <i>Custom Form</i> in <i>Online RMS</i> .
hide-title= <mark>"false"</mark>	Removes the Custom Form's Title 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.
hide-description= <mark>"false"</mark>	Removes the Custom Form's Description 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.
hide-section-headers= <mark>"false"</mark>	Removes the Custom Form's Section Group label from the Custom Form field designer when displayed on your website.

Configuration options with their default values:

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".

Example 1

If you do <u>not</u> want to display the **Custom Form Title** on the web page, use *hide-titlee="true"*. The **id** is the **Token ID** generated for your *Custom Form*.

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

Example 2

Example of all available configuration options. The **id** is the **Token ID** generated for your *Custom Form*.

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

For more information on the generated **Token**, refer to "Make Custom Forms Publicly Available" on page 280.

For an example of how a *Public Custom Form* display on your agency website, refer to "Sample Public Custom Form Website Display" on page 287.

Sample Public Custom Form Website Display

Publicly Available Custom Forms inherit the look and feel of its surroundings on your website, making it appear as if it were an original part of your web page.

Community Reporting | Caliber P × + ← → C G Solutions Services About Caliber Contact **Request A Demo** ber CONTACT SUPPORT Title **Online Police Self-Reporting Form** F THIS IS AN EMERGENCY PLEASE DIAL 911 NOTE: In the event that this involves shoplifting Get online support and explore the tips, tricks and helpful documents in the Calibe ou may be asked to come to the Police Department at a later date to file charges and you nay also be asked to provide additional documentation regarding the statement or receipt of Description 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 662-393-8652 to check the status of your report. **Requests for Proposals** (* Denotes Required Fields) Section Questions your business. Please forward all reque for bids to our Bid Group. Headers Do you know that filing a false police O Yes O No report is a crime? * Are you eighteen (18) years of age or ○ Yes ○ No older? Did the incident occur within the City ○ Yes ○ No Questions limits? CONTACT SALES Do you know who committed this crime? O Yes O No If yes, provide any known suspect nformation

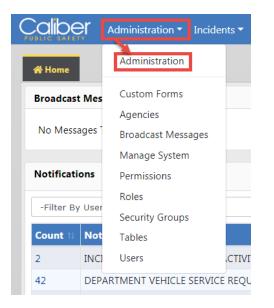
Below is an example of how a *Public Custom Form* displays on your agency website:

Chapter 16. Module Admin

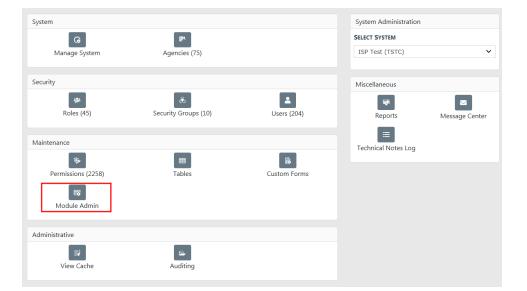
The Module Admin feature must be enabled by Caliber Public Safety personnel in order for an agency to use it. In addition, only administrative users who have been assigned the appropriate role can access and manage the Module Configuration page.

Access Module Admin

Click on the **Administration** label, then **Administration** again, to access the *Administration Home* page.



Click the **Module Admin** link to open the *Module Configuration* page.



Click on individual links			
Incident Rules	Configure Incident rules for agency: -Select Agency-	~	
Incident Rules	Configure Incident rules for your agency District 42, Versailles		
Field Arrests	Configure Field Arrests for product and agency settings.		
Field Arrests	Configure Field Arrests For Your Agency Indiana State Police		
Officer Daily Logs	Configure Officer Daily Logs for any agency.		
Officer Daily Logs	Configure Officer Daily Logs For Your Agency District 42, Versailles		
Maps Administration	Configure Maps		
Civil Process	Configure Civil Process for product and agency settings.		
Civil Process	Configure Civil Process For Your Agency District 42, Versailles		
Lost & Found Locations	Configure Lost & Found Locations For Your Agency District 42, Versailles		
Lost & Found Locations	Configure Lost & Found Locations for agency: -Select Agency-	~	
Evidence Labels	Configure Evidence Labels Across Agencies		
Evidence Labels	Configure Evidence Labels For Your Agency District 42, Versailles		
Warrants	Configure Warrants		
Photo Lineups	Configure Photo Lineups		
Fleet Management	Configure Fleet Management for product and agency settings.		
Training	Configure Training.		
Personnel Management	Configure Personnel Management.		

The column on the left of the *Module Configuration* page contains links to individual topics. Click on an individual link to open a unique configuration page for that topic. **Note**: For multi-level agencies, administrators with appropriate permissions can choose a specific agency within their organization when managing *Incident Rules* and *Lost & Found Locations* configurations.

Gvil Process, Fleet Management, and *Training* are used for illustration purposes; the remaining configuration setting options follow a similar process only with different data requirements.

Incident Rules and Validation Settings

Authorized users can configure Incident rules and validations.

Manage these options from the *Module Configuration* page. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

You can <u>Select Agency</u> to manage its configuration, or you click on the <u>Configure Rules</u> <u>For All Agencies</u> link to open the Rules & Validations page.

Incident Rules	Configure Incident rules for agency:	-Select Agency-			
Incident Rules	Configure Rules For All Agencies				
Rules & Validations - Ang Pol	ice Department				
	cident Victims Incident Offenders				
Agency: Ang Police Department Module: Incident					
	active		Show View:	Condition Edi	itor 💙
My Agency Conditions No Conditions 		,	Add Condition	Expand All	Collapse All
	Save				

Select each tab to add any necessary rule and validations.

You can set up a rule to trigger a set of questions to appear when a specific Incident Type is chosen. For example, Incident Type of Civil Dispute would trigger the Yes or No question of "Was a Civil Citation Issued?"

Civil Process Product Settings

Product configuration options include the following:

- Court Paper Types
- Court Paper Sub-Types
- Reference Types
- Other Party Roles
- Party/Org Roles
- Payment Types
- Log Action Types

To manage these options from the *Module Configuration* page, click the <u>Civil Process</u> link with *product and agency settings* in the description. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency District 42, Versailles

The *Product Config* table opens with the seven configuration options in separate tabs across the top, resting on the **Court Paper Types** tab by default.

vil Process Product Administration			Product Administration Seven Tabs					
Court Paper Types Court Paper Sub-Type		Court Paper Sub-Types	Payment Types	Log Action Types				
Code	Descri	ption	Active	Details		♥ Add	Actions	
OP	Civil Pr	otection Order	Yes	Child Support Civil Civil Criminal Domestic Violence Emergency Order Interim Order Juvenile Petition to Revoke Prot Preliminary	pation		Z I	
NTA	Notice	to Appear	Yes	Child Support Civil Criminal Domestic Violence Emergency Order Extradition Interim Order Jury Trial Juvenile			8	
ORD	Order		Yes	 Child Support Civil Criminal Domestic Violence 			6	

Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

The **Court Paper Types** option is used for illustration purposes.

Add Court Paper Type Code

1. Click on the <u>Add Court Paper Type Code</u> link to display the *Court Paper Type Code* entry form.

Court Paper Type Code
CODE
OP
DESCRIPTION
Civil Protection Order
ACTIVE
\checkmark
SUB-TYPES
× Civil × Domestic Violence
Close Save

- 2. Enter the Code and Description.
- 3. The Active box is checked by default. Deselecting this button allows you to save the information entered and activate the Court Paper Type at a later date.
- 4. Select all Sub-Types that apply.
- 5. Click **Save** to save the record and return to the *Product Config* table., or click **Close** to cancel without saving.

Edit Court Paper Type Code

1. Locate the record you need to edit in the table.

- 2. Click in the Actions column in the same row as the record listing to display the *Court Paper Type Code* page.
- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the *Product Config* table.

Delete Court Paper Type Code

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- **3.** If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Product Config* table.

Civil Process Agency Settings

On the *Module Configuration* page click the <u>Civil Process</u> link with your agency's name in the description. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Civil Process	Configure Civil Process for product and agency settings.
Civil Process	Configure Civil Process For Your Agency District 42, Versailles

The Configuration page appears.

Administration / Module Configuration / Civil Process Configuration	
Civil Process Agency Administration	lack
FEE COLLECTIONS ENABLED	
Save	
Would you like to zero out existing court paper fees?	
RUNNING THIS SCRIPT WILL ADD A FEE COLLECTION TO ALL EXISTING COURT PAPERS IN THE AMOUNT OF THE TOTAL FEES.	
Zero Fees	
Would you like to manage court locations and received from agencies for District 42, Versailles agency?	
Manage Court Locations	

Check the Fee Collections box to enable, or uncheck to disable, then click Save.

Click Zero Fees to zero out existing court paper fees.

Click **Manage Court Locations** to manage Court Locations. For detailed instructions refer to "Court Locations" on page 220.

Click the **Go Back** button on the upper right of the page to return to the *Module Configuration* page.

Fleet Management Settings

Configuration options include the following:

- Equipment Types
- Vehicle Status, Vehicle Category, Vehicle Assignments, Vehicle Groups, Vehicle Repairs, and Vehicle Ratings
- Category Roles
- Misc IDs
- Vendors and Funding Vendors
- Service Request Types and Service Request Status
- Storage Locations
- Budget Codes
- Fuel Types and Fuel Payments
- Fluid Types
- Inspection Types and Inspection Status
- Insurance Claim Types
- Crash Hours Groups
- Crash Damage Codes
- Crash Cause Codes
- Crash Reference Types
- Crash Types Codes

To manage these options from the *Module Configuration* page, click the <u>Fleet Management</u> link. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

The *Product Config* table opens with the configuration options in separate tabs across the top, resting on the **Equipment Types** tab by default.

-	dministration					Та	bs		Go
Equipment Types	Vehicle Status	Vehicle C	Category Ca	tegory Role	es Vehicle Ass	ignments	Vehicle Gr	oups Misc ID	s Vendors
Funding Vendors Vehicle Repairs		Service	Service Request Types		Service Request Status		Storage Locations B		Vehicle Ratings
Fuel Types Fluid	Types Fuel P	ayments	Inspection Typ	es Ins	pection Status	Insurance C	laim Types	Crash Hours (Groups
Crash Damage Codes	Grash Cause	Codes	Crash Reference	Types	Crash Type Codes				
								• A	dd Equipment Type
Code		Descr	iption				Active		Actions
EQTYPE_3		FIRST	_AID_KIT				Yes		2
		HAND	CUFFS				Yes		2
EQTYPE_5							Yes		2
EQTYPE_5 EQTYPE_1		RADA	R				ics		
			R R_GUN				Yes		
EQTYPE_1			R_GUN						

Click on the individual tabs to access the different options. With the appropriate permissions, you can add, edit, and delete settings within each tab. While the data differs with each configuration option, the functionality remains consistent.

The **Equipment Types** option is used for illustration purposes.

Add Equipment Types

1. Click on the <u>Add Equipment Type</u> button to display the Equipment Type entry form.

Equipment Type	
CODE	
DESCRIPTION	
	Close Save

- 2. Enter the Code and Description.
- 3. The Active box is active by default. Deselecting this button allows you to save the information entered and activate the Equipment Type at a later date.
- 4. Click **Save** to save the record and return to the *Product Config* table., or click **Close** to cancel without saving.

Edit Equipment Types

- 1. Locate the record you need to edit in the table.
- 2. Click in the Actions column in the same row as the record listing to display the Equipment Type page.
- 3. Make changes as needed.
- 4. Click **Save** to save changes and return to the *Product Config* table.

Delete Equipment Types

- 1. Locate the record you need to delete from the table.
- 2. Click in the Actions column in the same row as the record listing.
- **3.** If a confirmation prompt displays, click **Yes** to confirm deletion, or click **No** to cancel deletion, and return to the *Product Config* table.

Training Settings and Configuration

Configuration options include the following:

- Course Templates
- Maintenance Settings (List courses and certifications that are about to expire within a set number of days)
- Course Types
- Course Classifications

To manage these options from the *Module Configuration* page, click the <u>Training</u> link. For instructions on accessing the *Module Configuration* page refer to "Access Module Admin" on page 289.

Fleet Management	Configure Fleet Management for product and agency settings.
Training	Configure Training.

For details on settings and configurations refer to "Training Module" on page 151.

Chapter 17. Collapse Duplicate Master Indices

Master Indices are centralized pieces of data that are accessed from different modules of the system for consistency. Each index is represented only once, such as a person, address, vehicle, and organization. For example, all Caliber Public Safety Online RMS modules access the same person record for Jbe Smith with SSN 123-12-1234 and the same vehicle record for VIN ABC1235223DE45455.

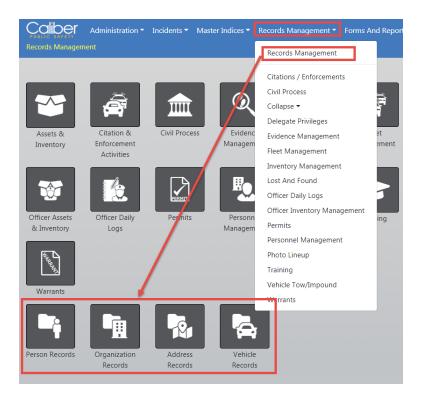
There may be times when users inadvertently create a duplicate master person, address, vehicle, or organization in Caliber Public Safety Online RMS. The agency administrator, with proper permissions, can identify and collapse duplicates records, creating one master person, address, or organization record.

Access Collapse Process

There are two ways to access the **Collapse** process.

Option 1

Click on the *Records Management* label and *Records Management* again, then click the appropriate icon that corresponds to the Master Index you want to collapse.



Option 2

Select **Person Records**, **Address Records**, **Organization Records**, or **Vehicle Records** from the **Records Management** drop down menu.

Master Indices 🔻	Record	s Management 🔻 Forms	And	Reports 👻 Help 👻		
	Reco	ords Management				
		ions / Enforcements Process				
	Colla	apse 🖡 🐂		Collapse		
		gate Privileges ence Management		Address Records Organization Rec	ords	Recent /
• s	Inve	t Management ntory Management		Person Records Vehicle Records	orus	Initial Pendii
ITY UPDATED		And Found er Daily Logs	ŀ	ligh		My Ca
JEST SUBMITTED	Offic	er Inventory Management		ligh		My Ca
)L	Pern	nits	F	ligh		Count
		onnel Management	F	ligh		Evider
CASE DECISION NEE		to Lineup	H	ligh		Open
	Trair Vebi	ning cle Tow/Impound	H	ligh		Arrest
NMENT ENDED		rants	N	/ledium		
			U	Jrgent		Forms
ITY UPDATE REQUES	TED	07/02/2019 11:04 AM CST	F	ligh		Pendii

Search for Duplicate Master Indices

Use the following procedure to search for potential Master Index duplicate records. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization using different search criteria.

1. Access **Person Records** to open the *Select - Collapse Oriteria* page to search for potential duplicates. (See "Access Collapse Process" on page 299, if needed.)



2. You must select one Master Person record as the *primary* record, and at least one Master Person record as the *duplicate*.

You can either manually search for and identify the duplicates, or you can let the system search for potential duplicates based on the search criteria you enter.

Select one option then follow the applicable steps below:

Select a Person

a. Select this option to manually search for and identify duplicates, then click **Continue** to open the *Master Index Search* page.

			Mug Shot Se	earch - By Physical Description	Add Persor
🚢 Person					
LAST NAME		FIRST NAME		MIDDLE NAME	
Clark	×				
TITLE		DOB		AGE	
-Select-	~		曲	То	
RACE		SEX		INDEX ID	
-Select-	~	-Select-	~		
DRIVERS LICENSE		DRIVERS LICENSE STATE		SSN	
		-Select-	~		
NAME TYPE		CREATOR			
-Select-	~				E
CREATION DATE FROM		CREATION DATE TO			
	曲		曲		
PHONETIC	SOUNDEX	STATEWIDE SEARC	н 🕇	SEARCH PREFERENCE	
				ALL ANY	
ADDITIONAL SEARCH C	RITERIA				
- Select -	~				
Search External Sys	stems				
		Go Back Reset S	earch		

b. Enter your search criteria then click **Search** to display the *Person Search Results*, then select the *Master Person* you want to use as the *primary* record.

Q Person Search Results Select Bi Bi 4/2 3 / 3										Select one	
Last ↓↑ Name	First 11 Name	Middle⊥↑ Name	Title↓↑	Sex⊥↑	Race↓↑	DOB ↓↑	SSN ↓î	Misc ID ↓↑	Name⊥î Type	Index ↓↑ ID	Actions
🛕 Clark	Ranelle	Marie		F	W	03/16/1959	123-99-1234		Primary Name	1080	•
A Clark	Ranelle			F	W	03/16/2010		t12344aa10	Primary Name	1082	• 2
CLARK	WILLIAM	RAY		м	W	07/18/1973	111-30-1750	2102131	Primary Name	405	• 0

c. The *Person Collapse* page opens with the selected Master Person record listed as the *Primary Person*. Click the **two-arrow** icon in the *Actions* column to select a different primary person record if necessary.

ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	
rimary	Filters							CI	ick to	change	primary perso
Last Name	First Name	Middle Name									
ptiona	l Filters										
RACE	Sex	DOB	SSN	DL #		Agency					
					Searc	:h Matche	s				
		lansed									• Add Duplicate P
uplicat	tes To Be Co	mapsea									
· ·			emoved from this	list befor	e collapse.						

Hover your mouse over the **blue information bubble** to view detailed information about the Master Person record.

	Collapse / Person Deta	ails											
)	Last Name	First Name	Middle Name		Race	Ethnicity	Sex	DOB	SSN	DL #	Creat Agen		Actions
1080	Clark	Ranelle	Marie		White		Female	03/16/1959	123991234		India	na State	
	ast Name llark	First Nat Ranelle	ИЕ		dle N ame arie		DOB 03/16/19	59 (Age: 60)	SEX Female			lace White	
1	23-99-1234		(R ESIDENCE) st 82nd Street	#415	INDIANA	POLIS, IN 4	6250		INDEX ID 1080				

d. You can search for the duplicate Master Person record by selecting specific **Filters** that match with the primary person, or click the **Add Duplicate Person** link to manually search for a specific Master Person record using your own search criteria.

As a **Filter** example, select the **Last Name** and **First Name** filter buttons to search for other Master Person records that share the same last and first name as the Primary Person, then click **Search Matches** to display a list of potential duplicates. Buttons turn green when selected and those that have not been selected are gray.

Primary Filters	•				
Last Name	First Name	Middle Name			
Optional Filter	s				
	Sex	DOB	SSN	DL #	Creator Agency
		s	earch Matches		

e. Click the select icon in the Actions column to select the New Primary Person Record.

Duplica	tes To Be	e Collaps	ed							C	Add Duplicate Persor
Any und	esired rec	ords shou	ld be rem	oved fro	m this list be	efore col	llapse.				
ID 1↓	Last 1↓ Name	First 1↓ Name	Middle1↓ Name	Race≒	Ethnicityî↓	Sex 1↓	DOB îl	SSNî↓	DL# î↓	Creator Agency	Actions
1082	Clark	Ranelle		White		Female	03/16/2010		T12344AA10	Indiana State Police	b 0 m

Specify Person Details to Search for Potential Duplicates

a. Select this option to let the system search for potential duplicates based on the selected **Filters**, then click **Continue** to open the *Search Person Matches* page.

										Go Back
Primary Filters										
LAST NAME	FIRST NAME		MIDDLE NAM	IE						
Optional Filters										
RACE	SEX		DOB							
SSN	DL #		CREATOR AGE	ENCY						
CREATOR DATE FROM			CREATOR DAT	te T o						
		曲					曲			
				Go Back	Searc	,				
			_			_				
Potential Duplicate	Groups									
Show 25 \$ entrie	es								Previous	Next
									Previous	Next
Showing 0 to 0 of 0 er	ntries									
Last î⊥ First	11 Middle	11 Ra	ce 11 Sex 11	DOB 11	SSN 11	DL↑↓	Creator 11	#Possible 1	Actions	
Name Name	Name					#	Agency	Matches		_
			No	data avai	lable in t	able				
Showing 0 to 0 of 0 er	ntries								Previous	Next

b. Select the **Filters** that apply to your search, then click **Search** to display a list of *Potential Duplicate Groups*.

For example, select **Last Name**, **First Name**, and **Sex** to search for all Master Person records that contain the same last name, first name, and sex.

Primary Filter	'S										
Last Name	FIRST NAME		VIDDLE NAME	E							
		0									
Optional Filte	rs										
RACE	Sex		ООВ		-						
		(teria the			
SSN	DL #	C	REATOR AGE	NCY	S	Search	to o	display n	natches		
		0				1					
CREATOR DATE F	ROM	C	REATOR DAT	e T o							
		#					#				
						<u>.</u>					
				Go Back	Sear	rch					
Potential Dup	olicate Groups			Go Back	Sear	rch					
	blicate Groups			Go Back	Sear	rch			_	_	
Potential Dup	entries			Go Back	Seal	rch			Previous 1	L 2 3	Next
	entries		(Go Back	Sea	rch			Previous 1	1 2 3	Next
Show 25 ¢	entries 5 of 51 entries	Middle		Go Back	C Sear	ssn ti	DL îi #	Creator II Agency	Previous 1 #Possible 11 Matches	L 2 3	Next
Show 25 ¢ Showing 1 to 2 Last Name	entries 5 of 51 entries								#Possible 11		Next
Show 25 ¢ Showing 1 to 2 Last Name ALLEN	entries 5 of 51 entries 1: First Name			Sex11					#Possible 11 Matches		
Show 25 ¢	entries 5 of 51 entries 11 First Name DONALD			Sex 11 M					#Possible 11 Matches 2		
Show 25 \$ Showing 1 to 2 Last Name ALLEN BECKER	entries 5 of 51 entries 1 First Name DONALD CHRISTOPHER			Sex il M M					#Possible # Matches 2 2		
Show 25 ¢ Showing 1 to 2 Last Name ALLEN BECKER BECKER	entries 5 of 51 entries First Name DONALD CHRISTOPHER CHRISTOPHER			Sex 11 M M U					#Possible Matches 2 2 3		

- c. Click the select icon **b** in the *Actions* column to select the Group you want to collapse.
- d. The *Person Collapse* form appears displaying the two matching Master Person Index records under the *Duplicates To Be Collapsed* section.

N	.ast Jame	First Name	Mid Nan		Race	Ethnicit	y Sex I	DOB SSN	DL # C	reator Agen	cy Actions
				Please se	elect a prima	ry perso	n from the lis	t of duplicat	es below.		
rimary	/ Filters										
LAST NAME	First Name								\mathbf{i}		
ption	al Filters										
R ACE	Sex	DOE			DL #	CREATOR Searc	Agency ch Matches			\backslash	
ouplica	ites To Be	Collapsed									O Add Duplicate Perso
	desired reco				this list befo						
		First 🔃	Middle 🔃 Name	Race 11	Ethnicity 1	Sex 11	DOB 11	SSN 11	DL # 11	Creator 11 Agency	Actions
Any une ID fi	Last 11 Name	Name	T anno					10001004			
ID †		Name Ranelle	Marie	White		Female	03/16/1959	123991234		Indiana State Police	

- e. Optionally click the **Add Duplicate Person** link to search for and add another Master Person to the *Duplicates To Be Collapsed* list
- f. Click the select icon in the *Actions* column on the record you want to use as the Primary Person. Hover your mouse over the hand icon to display the Make Primary Person message.

Note: You must select one Primary Person to continue the collapse process.

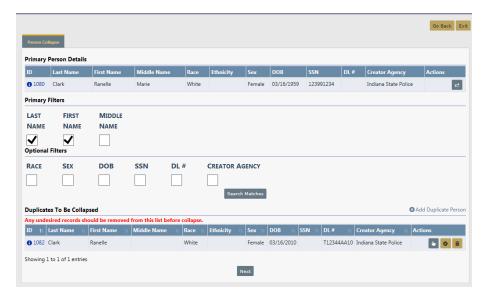
g. The selected duplicate record moves from the *Duplicate To Be Collapsed* section to the *Primary Person Details* section. This primary person record becomes the only Master Person Index record after the collapse process finishes.

Primary	Person De	etails									
ID	Last Name	First Name	Middle Name	Race	Ethnicity	Sex I	DOB	SSN	DL #	Creator Agency	Actions
1080	Clark	Ranelle	Marie	White		Female (03/16/1959	123991234		Indiana State Police	=
Primary	Filters										
Last Name	First Name	Middle Name									
Optiona	l Filters										
	Sex		SSN	DL #	CREATOR	AGENCY	5				
Duplicat	tes To Be (Collapsed								(Add Duplicate Persor
Any und	lesired reco	rds should b	e removed from	n this list l	before collap	se.					
ID †1	Last 👊 Name		iddle 11 Race 1 ame	1 Ethnici	tyn: Sex n	DOB	11 SSN	11 DL #		Creator 11 Act Agency	tions
1 133	Clark	Ranelle	White		Female	03/16/20	010	T12344/		ndiana itate	5

- h. Click on the delete icon to remove records from the Duplicates To Be Collapsed list that should not be included in the collapse process, or click the not duplicate icon to flag the record as Not Duplicate and enter a comment as to why it is not considered a duplicate. Both methods remove the record from the Duplicates To Be Collapsed list.
- 3. Click **Next** to run the collapse process. For more information about running the collapse process refer to "Run Collapse Process" below for instructions on collapsing Primary and Duplicate Master Index Records into one Master Record.
 - **Note**: Before running the collapse process, double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record

Run Collapse Process

Use the following procedure to collapse Primary and Duplicate Master Index records into one Master Record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization using different criteria. Select the Primary and Duplicate Master Person Index records to collapse. (For more information on accessing the collapse process and searching for duplicates see "Access Collapse Process" on page 299 and "Search for Duplicate Master Indices" on page 301, respectively.)



Note: You must select one Primary Person and at least one Duplicate to run the collapse process.

- 2. Double check the *Duplicates To Be Collapsed* list to ensure the only records that appear are those you want to collapse with the *Primary Person* record; remove any that should not be included.
- 3. Click Next
- 4. A warning message appears when the duplicate record is associated with other records in the system such as, incidents, arrests, etc. Hover the mouse over the red triangle for a summary of the associations.

In the example below, the duplicate person is associated with one incident.

Name Name Name Name Ward Ward <th< th=""><th>Name Name Name Ware Ware Ware # Agency 1080 Clark Ranelle Marie White Female 03/16/1959 123991234 Indiana State Police • Warning: Names that have a warning icon next to them, are directly associated to system records. If you do not choose to keep these names, the names will be re by the primary person's name. The changes to these system records can NOT be undone by un-collapsing.</th><th>ctions</th></th<>	Name Name Name Ware Ware Ware # Agency 1080 Clark Ranelle Marie White Female 03/16/1959 123991234 Indiana State Police • Warning: Names that have a warning icon next to them, are directly associated to system records. If you do not choose to keep these names, the names will be re by the primary person's name. The changes to these system records can NOT be undone by un-collapsing.	ctions
Warning: Names that have a warning icon next to them, are directly associated to system records. If you do not choose to keep these names, the names will be r by the primary person's name. The changes to these system records can NOT be undone by un-collapsing. elect the Aliases you want to transfer to the primary person.	Police Warning: Names that have a warning icon next to them, are directly associated to system records. If you do not choose to keep these names, the names will be re by the primary person's name. The changes to these system records can NOT be undone by un-collapsing.	
by the primary person's name. The changes to these system records can NOT be undone by un-collapsing.	by the primary person's name. The changes to these system records can NOT be undone by un-collapsing.	
Last Name First Name Middle Name Title DOB SSN Date Of Info		

5. Select the box to the left of the person you want to transfer to the primary person.



6. Click the **Collapse** button to continue with the collapse process, click **Exit** to abort without collapsing, or click **Go Back** to return to the *Person Collapse* screen.

By choosing **Collapse**, the name on the associated records becomes the primary person name.

7. A warning and comment box appears. Enter a **Comment** and click **Save** to continue the collapse process, or click **Cancel** to abort without collapsing.

Collapse People
Warning: All Duplicates selected will be collapsed into the selected primary Person. COMMENTS
Cancel Save

8. The Person Collapse screen appears when the Collapse process is complete.

	_			Perform a	Another Task E
Person Collapse Primary Pers					🔓 🗹 Edit Perso
LAST NAME Clark	FIRST NAME Ranelle	MIDDLE NAME Marie	DOB 03/16/1959 (Age: 59)	SEX Female	RACE White
DRIVER'S LICENSE # T12344AA10	DRIVER'S LICENSE STATE Indiana	SSN 123-99-1234	ALIASES Ranelle Clark(A	Alias)	
ADDRESS (RES 6081 East 82r 46250	IDENCE) nd Street #415 IN	DIANAPOLIS, IN	INDEX ID 1080		

Click **Perform Another Task** to Collapse other records, click the **Edit Person** link to edit the person details, or click **Exit**.

9. Data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

For more information about the *Collapse Log* or the *UnCollapse* process, refer to "Collapse Log" below.

Collapse Log

Basic Master Index data is collected and logged during the collapse process for auditing and tracking purposes. The *Collapse Log* also provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

The Collapse Date, Collapsed By, Master Index Name and other information depending on the Master Index are tracked in the *Collapse Log*. For example, for the Master Person Index, Race, Sex, DOB, SSN, and Driver's License Number of both the Primary and Duplicate Person records are logged.

Use the following procedure to access the *Collapse Log*. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

- Access the Collapse process through the Records Management menu, then select Person Records for Master Person. For more information on accessing the Collapse process refer to "Access Collapse Process" on page 299.
- 2. Click the Collapse Log button to open the Person Collapse Log.

People Col	lapse		Coll	apse Log
SELECT A CRIT	ERIA TO PROCESS (OLLAPSE		
 Select 	a Person			
Specif	iy Person Detail	s to sear	rch for potential duplicates	
			Go Back Continue	
Search		SE/	ARCH BY	Go Back
Enter search tex	t	S	earch By 🗸	
			Reset Search	
Collapse ↓↑ Date/Time	Collapse By 🛛 🕸	Index ↓↑ ID	Person Summary	Actions
2019-03-04 12:30:53.0	CSAUR	1080	CLARK RANELLE MARIE RACE: White DOB: 1959-03-16 00:00:00.0 SSN: 123991234 DL #: T12344AA10	•
2018-03-07 11:55:36.0	STATE_OFFICER11	1070	HARRIS AVERY MARIE RACE: White DL #: 12345	•
2018-02-26 16:07:51.0	STATE_OFFICER11	740	BRANSON ROBERT RACE: White DOB: 1972-10-24 00:00:00.0 SSN: 123456789 DL #: CO11111	•
2017-08-24 11:15:24.0	STATE_OFFICER11	932	WHITE SAM PERSON01 RACE:Asian DOB:1980-06-01 00:00:00.0	•
2017-06-29 12:59:03.0	STATE_OFFICER11	908	BROWN CHARLIE SNOOPS RACE:White	•
2017-06-06 13:34:23.0	STATE_OFFICER11	910	ZEDILLO REALLY REALLY REALLY LONG LAST NAME ERNESTO EXTREMELY MUCHO LONG FIRST NAME LONG MIDDLE NAME RACE:Native Hawaiian or Other Pacific Islander DOB:1980-10-10 00:00:00.0 SSN:222444556 DL #:MX1234568	•
2016-10-31 13:11:03.0	TSTC	719	KID BILL TEH RACE: White	•

3. Optionally click the Index ID link to open the View Person screen.

Collapse Date/Time	↓† Collaps	se By	11 Inde ID	ex ↓î	Person S	ummar	у				Action	s
2019-03-04 12:30:53.0	CSAUR		1080	_			MARIE RACE DL #:T12344/		OB: 1959-	-03-16 00:00:00.	0	•
A Person Details	Person Summary								Go Back Pi	rint Report Visualization To	ol Update Details	Subscril
Audit Off INDEX ID 1080	&1 ♪ @ ⊗	81 • 4		A 25	* & 00	n e ø	i			Total Involvement	s	
LAST NAME		E	IRST NAME				MIDDLE NAME			Incidents	07/17/2018	2
Clark		F	Ranelle				Marie			CourtPapers	06/18/2017	1
TITLE			OB 3/16/1959				SSN 123-99-1234			CallsForService	03/16/2018	1
SEX			ACE				123-99-1234 ETHNICITY			Incident By Role		
Female			White				Linderi			Offender		2
DRIVERS LICENSE		D	RIVERS LICENS	E STATE						Common Event As	sociations	
RESIDENCE PHONE		0	ELL PHONE				RESIDENCE ADDRESS			Address		1
			-				6081 East 82nd Stree	t #415 INDIAN	APOLIS, IN	Organization		1
							46250			Person		1
A Aliases										By Offense Catego	orv	
Last Name	First name	Middle	Titl		OOB	SSN	Туре		ate Of Info	Property		1
Clark	Ranelle	Marie			3/16/1959	123-99-12			7/12/2018	Person		1
Clark	Ranelle			0	3/16/2010		Alias	C	3/16/2018	Vehicle		1
& Addresses										Society		1
Address					Туре	Occupied	Comment	ts [ate of Info	By Incident Status		
6081 East 82nd St	treet #415 INDIANAPO	LIS, IN 46250			Residence	-		C	7/12/2018	Initial Report		2
R Identification	1									Initial Neport		-
Entremententention		(D	State	Count	v Date of i	Issue E	cpire Date Desci	ription [ate of Info			
	ID Type Classes /	Restrictions										

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For instructions on using the View Person screen refer to the Caliber Online RMS User Guide.

Click the Go Back button to return to the Person Collapse Log.

4. Optionally search for specific records.

Enter your search criteria in the **Search** text box and select the type of data you want to **Search By**, then click the **Search** button.

SEARCH					SEARCH BY	
clark					Search By Index ID Race Sex Dob	
Collapse Date/Time	Collapse B	y ↓†	Index ↓î ID	Pers	Middle Name First Name Last Name	
2019-03-04 12:30:53.0	CSAUR		1080	CLAI #:T1		
2018-03-07 11:55:36.0	STATE_OFF	ICER11	1070	HAR	RRIS AVERY MARIE RACE:White DL #:12345	
						Go F
SEARCH			SEARCH B	r		001
clark			Last Nan	ne	~	
					Reset Search	
	Collapse 💷	Index	11 Person Su	mmary	у	Actions
Collapse Date/Time	Ву	ID				

5. Optionally click the **Select** icon in the *Actions* column to open the *Person Collapse* screen to view the details of the collapsed data.

Collap Date/1		11	Collapse By ↓î	Index ↓↑ ID	Person Sum	mary								Actions
2019-0 12:30:5			CSAUR	1080	CLARK RANE		RACE:Wh	ite DOB: 19	59-03-16 0	0:00:00.0 SSN: 123	991234	DL		•
														Go Back
	ary Pei Name	son	Details First Name	N	liddle Name		Race	Sex	Date	Of Birth	SSN			DL #
Clark			Ranelle		larie		W	F	03/16/			99-1234		DL "
Colla	psed R	eco	rds											
	Inde	x ID	Last Name	Firs	t Name	Middle I	Name	Race	Sex	Date Of Birth		SSN	DL /	ŧ
	1082		Clark	Ran	elle			W	F	03/16/2010			T12	344AA10
сомм	IENTS													
						Go I	Back UnC	Collapse						

Note: The UnCollapse button provides a way to reverse the results of the collapse process. For instructions on using the UnCollapse button refer to "UnCollapse Master Index" below.

6. Click Go Back to return to the Person Collapse Log.

UnCollapse Master Index

The *Collapse Log* provides a way to reverse the results of the collapse process, to *UnCollapse* the duplicate master index from the primary record.

Use the following procedure to uncollapse a Master Index record. While the instructions are specific to Master Person, follow the same general process for Address, Vehicle, and Organization.

- 1. Access the **Collapse Log** through the *Records Management* menu, then select *Person Records* for Master Person. For more information on accessing the **Collapse Log** refer to "Collapse Log" on page 311.
- 2. Identify the collapsed record you want to uncollapse, then click on the **View** icon in the *Actions* column to open the *Person Collapse* screen.

Collapse Date/Time		Collapse By		index ↓î P iD	erson Summ	ary					
2019-03-04 12:30:53.0		CSAUR	:		LARK RANELL T12344AA10	e marie F	RACE:White	DOB:19	59-03-16 00:00:0	0.0 SSN: 1239	91234 DL
											Go Back
Primary Pe	erson [
Last Name Clark		First Name		Middle Na Marie	ame	Race W	Sex F		Of Birth	SSN 123-99-1234	DL #
Clark		Kanelle		Marie		vv	F	03/16/	1929	123-99-1234	
Collapsed	Record	ls									
Ind	ex ID	Last Name		First Name	Middle	Name	Race	Sex	Date Of Birth	SSN	DL #
108	2	Clark		Ranelle			w	F	03/16/2010		T12344AA10
COMMENTS											
					_		Collapse				

3. Select the **Collapsed Records** you want to uncollapse from the Primary Person and enter any **Comments**.

ast Name	First Name	Middle Nam	e	Race	Sex	Date 0	Of Birth	SSN		DL #
llark	Ranelle	Marie		w	F	03/16/	1959	123-9	99-1234	
Collapsed Recor	ds									
Index ID	Last Name	First Name	Middle I	Name	Race	Sex	Date Of Birth		SSN	DL #
1082	Clark	Ranelle			w	F	03/16/2010			T12344AA10
OMMENTS										
Collapsed in error										

4. Click the UnCollapse button to process your request.

Several events occurred as a result of the uncollapse process:

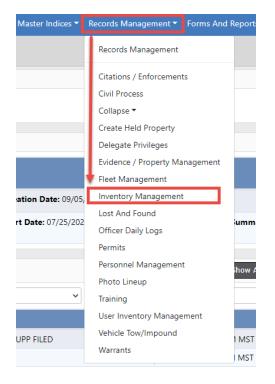
- The primary and duplicate persons are once again separate Master Person records.
- The name on all associated records (i.e., incidents, arrests, etc.) are back to the original pre-collapse state.
- The Person Collapse Logentry has been removed.

SEARCH	SEARCH BY		
clark	Last Name	~	
	Reset Search		
No Collapse Logs Found	d		

Chapter 18. Inventory Administration

Inventory Administration allows users with proper permissions to configure and maintain settings for office supplies, fixed assets, weapons, equipment, vendor list, locations with assigned managers, clothing, and others.

Access Inventory Administration



Click on the Records Management label then click on User Inventory Management.

Click the **Administration** button to open the **Inventory Administration** page containing up to four tabs depending on your agency setup.

						Exit
Inventory Management						
Add New Inventory	Browse	Check-In	Packs	Inspections / Audits	Administration	

	Go Back
Inventory Setup Locations Organizations Vendors	
Select an Administrative Option Above	

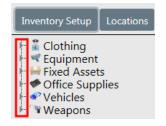
- Inventory Setup
- Locations
- Organizations
- Vendors

Inventory Setup

The *Inventory Setup* tab of the **Inventory Administration** page contains configuration settings of clothing, equipment, fixed assets, office supplies, vehicles, and weapons.

	Go Back
Inventory Setup Locations Organizations Vendors	
Clothing Clothing Fixed Assets Office Supplies Vehicles Weapons	

To the left of each category is a sideways **funnel**. Click on the **funnel** to drill-down for sub-categories, and sub-categories may also have funnels. You can keep drilling-down until no more funnels appear.





Locations

The *Locations* tab of the **Inventory Administration** page contains configuration settings for various types of locations such as a warehouse, closets, rooms, parking lots, and managers assigned to the locations.

Inventory Setup	Organizations Vendors					Go Ba
SAdd / Edit Locations	Location Managers	— Sub-tal	bs			• Add Locatio
Show 10 ¢ entries					Search:	• Add Locate
Location Name	†⊥ Agency	11 Location 11 Type	Self 11 Checkout	Sub Locations	11	Actions 1
D42 - Armory	District 4 Versaille		Yes	Shelf A Shelf B Shelf C Pending Location		2
D42 - Garage	District 4 Versaille		Yes	Shelf 1 Shelf 2 Shelf 3 Pending Location		2 🕫
D42 - Other	District 4 Versaille		Yes	Shelf A Shelf B Shelf C Pending Location		2

There are two sub-tabs, *Add/Edit Locations* and *Location Managers*. Locations are configured and managed through the *Add/Edit Locations* tab and managers are assigned to locations through the *Location Managers* tab.

Organizations

The Organizations tab of the **Inventory Administration** page contains organization configuration settings, particularly useful for multi-agency users.

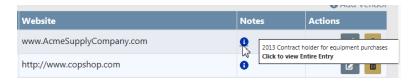
Inventory Setup Locations Organizations Vendors	Go Back
how 10 🗢 entries	Add Organization
Organization Name 1	Actions
County Jail1	a
DMM org	2
ocal Police Department	2
heriff's Office	2
nowing 1 to 4 of 4 entries	Previous 1 Next

Vendors

The *Vendors* tab of the **Inventory Administration** page contains vendor configuration settings.

Inventory Setup Locations Org	anizations Vendors					Go Back
Show 10 🖕 entries				Se	arch:	Add Vendor
Vendor Name	Contract # 11	Phone # 11	Website	11	Notes 11	Actions 11
Acme Supply Company	XL1234567	800-123-4567	www.AcmeSupplyCompany.com		0	e e
Cop Shop Stop	DL-1234	123-456-7899	http://www.copshop.com		0	2
Cop Stuff	ASF-1234	123-435-2323	http://www.interact911.com		0	2
Gear Head	DL-789456	303-303-3003	www.gearhead.com		0	2
Guns and stuff	(321) 123-4567	303-698-5555			0	2
ISP Vendor	8888	222-222-2222	vendor.com		0	2
Warner truck stop		996-587-4521			0	2
Showing 1 to 7 of 7 entries					Prev	ious 1 Next

Hover your mouse over the blue information bubble to view a portion of a note entry that is associated with the vendor record, or click the blue information bubble to view the entire note entry.



Chapter 19. Reports

Online RMS reports consist of five report types: Ad Hoc, Custom Field, Custom Form, and Standard Menu.

- Ad-Hoc reports are created via Jasper Reports or iReports. Once a user with the appropriate permissions has created and saved ad hoc reports, other users within the agency/schema who have been the appropriate roles/permissions, can then use them.
 - Note: iReport allows for a detailed and specific set of design options. A user who wants to alter the form beyond the capabilities of the Custom Form Designer would do so in iReport. They can download the template, make the changes in iReport, then re-upload it here. This will require the user to know how to use iReport.
- Custom field reports are built from user-defined fields that have custom labels.
- Custom forms reports are based on an agency's needs and are designed to gather specific information to meet those needs.
- Standard menu reports are those that are delivered with the system. They are basic, out-of-the-box reports for statistics and such.

For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS*

Report Administration

The *Report Administration* page provides administrators ways to manage the various reports.

Note: For information on how basic users access and use the various RMS reports, refer to the *Caliber Online RMS User Guide*. The **Forms And Reports** menu provides access to existing reports.

You can access, add, and update reports from the *Report Administration* page.

From the *Home* page, click the **Administration** menu label to open the *Administration Home* page, then click on the **Reports** icon to display the *Report Administration* page. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.

୍କ	(Dire		SELECT SYS	STEM		
Manage System	Agencies (75)		ISP Test	(TSTC)		~
Security			Miscellan	eous		
썢 Roles (45)	Security Groups (10)	Users (204)	Repo		Message	Cente
Maintenance			Technica			
Permissions (2258)	Tables	Custom Forms	Log			
Module Admin						
Administrative						
= 4	E					
View Cache	Auditing					
View Cache	Auditing					
View Cache	Auditing					Go B
	Auditing					Go B
Report List	Auditing			Search:		Go B
Report List	Auditing	1 Туре	1 Category	Search: Vali	id 11 ACt	Go B
ieport List now 10 C entries	Auditing	11 Type Standard Menu Report	(L) Category User		id 11 ACt	ions
Report List now 10 ¢ entries Name Jser Roster Report	Auditing			11 Vali	id 11 ACt	ions IZ
Report List how 10 ¢ entries Name Jser Roster Report Ticket Ledger Report		Standard Menu Report	User	11 Vali Yes	id 11. ACt	ions Z
Report List how 10 ¢ entries Name Jser Roster Report Ticket Ledger Report .aw Enforcement Officers Killed or As		Standard Menu Report Standard Menu Report	User Citations	11 Vali Yes Yes	id 11 ACt	ions [2 [2
Report List how 10 • entries Name Jser Roster Report Ticket Ledger Report Law Enforcement Officers Killed or As Supplementary Homicide		Standard Menu Report Standard Menu Report Standard Menu Report	User Citations UCR	Yes Yes Yes	d 11 ACt	ions Z Z
Report List how 10 ¢ entries Vame Jser Roster Report Ticket Ledger Report Law Enforcement Officers Killed or As Supplementary Homicide Persons Arrested - Juveniles		Standard Menu Report Standard Menu Report Standard Menu Report Standard Menu Report	User Citations UCR UCR	11 Vali Yes Yes Yes Yes Yes Yes	id 11 ACt	ions Z Z Z
Report List how 10 ¢ entries Name Jser Roster Report Ficket Ledger Report .aw Enforcement Officers Killed or As Supplementary Homicide Persons Arrested - Juveniles JCR Hate Crime Report	ssaulted (LEOKA)	Standard Menu Report Standard Menu Report Standard Menu Report Standard Menu Report Standard Menu Report	User Citations UCR UCR UCR	11 Vali Yes Yes Yes Yes Yes Yes Yes Yes	d 1 ACt	
Report List how 10 ¢ entries Name Jser Roster Report Ticket Ledger Report aw Enforcement Officers Killed or As Supplementary Homicide Persons Arrested - Juveniles JJCR Hate Crime Report JJCR Age, Sex, and Race Persons Arrester	ssaulted (LEOKA)	Standard Menu Report	User Citations UCR UCR UCR UCR	Yes Yes Yes Yes Yes Yes Yes	id 11 ACt	
Report List how 10 ¢ entries Name Jaser Roster Report Ticket Ledger Report Ausser Roster Report Licket Ledger Report JCR Hate Crime Report JCR Hate Crime Report JCR Age. Sex. and Race Persons Arrest Arrest Codes Report	ssaulted (LEOKA)	Standard Menu Report	User Citations UCR UCR UCR Statistical Statistical	till Valia Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	id 11 ACt	
Report List	ssaulted (LEOKA)	Standard Menu Report Standard Menu Report	User Citations UCR UCR UCR Statistical Statistical Incidents	Yes Yes Yes Yes Yes Yes Yes Yes Yes	id 11 ACt	

This page displays both custom created reports and product reports.

To edit a product report, click the edit icon to display an *Edit Report* page. Here, you can change the report name, category, description, agencies if applicable, and roles. In addition, Operations can control who has access to which reports.

Ad Hoc Reports

As the name implies, an ad hoc report is one created for a specific purpose. Online RMS agencies can create reports that perform specific functions within their agencies. To create ad hoc reports, a user (sometimes referred to as a *superuser*) must have the appropriate permissions and have access to the Jasper Server.

Ad Hoc Tool Access

For a user to access the Open Ad Hoc Tool, an agency administrator must set up that user with the appropriate access permissions.

Use the following procedure to set up ad hoc tool access.

- 1. From the *Home* page, open the **Administration** menu then click on **Users** to open the *Manage Users* page. The page opens to the *User Accounts* tab by default. For more information on accessing the *Administration Home* page, refer to "Access Administration" on page 1.
- 2. Use the **Search** fields to locate the user by typing a search parameter in the **Search** field, in the Status field select *Active*, then click the **Search** button to display a list of users that match your criteria.

User Acc	counts Lo	yg 🖌			1				Go Back Add Use
Search	hicks	1	× Status	Active	~	Subscription	n Level	All- V Res	Search Show 100 ¢ entrie
First 1	Middle11	Last 1	User îl Name	Statusî↓	Subscription 11	Agencyî↓	SA î∔	User Role	Actions
Aaron		Hicks	ODL_US ER	Active	Full Time	District 42, Versailles	Default	OFFICER OFFICER_SUPERVISOR	C 2 P 2
Showing	1 to 1 of 1	entries							Previous 1 Next
						Go Back			

3. Click in the Actions column in the same row as the user's name to open the user's profile page as shown.

					l	Emulate Go Back Sav		
ODL_USER - Profile Inform	ation Security Settings	Preferences	Subscriptions	Officer Information	Employee Informa	ition		
Contact Information								
USER ID LAST LOGIN DATE								
ODL_USER			03/02	2/2019 04:43:38 PM C	эт			
FIRST NAME		MIDDLE NAME		LAS	ST NAME			
Aaron				ŀ	licks			
JURISDICTION		TELEPHONE		EM	EMAIL			
ISP Test (TSTC)				t	test@test.com			
SUBSCRIPTION LEVEL		ENABLE EMAIL		ST	STATUS			
Full Time	~	✓		A	ctive			
Jurisdiction Informatio	n							
County #	Agency	Date Creat	ed I	Date Disabled	Default	Disabled		
ISP Test (TSTC)	District 42, Versailles	03/06/2017			۲			

4. Click the Security Settings tab.

							Go Back	Save		
ODL_USER - Profile Information		Preferences	Subscriptio	ons Offi	cer Information	Employee Information				
Change Password										
NEW PASSWORD			L	ST PASSWO	RD CHANGE DAT	E				
				12/14/2018	05:49:20 PM CS	т				
CONFIRM PASSWORD										
				Change Pass	sword Reset	Via Email				
Security Questions										
QUESTION			A	NSWER				_		
Color of your First Car			▼ 1	Test						
In what Town was your First Job			▼ 1	Fest						
Name of the City you Were Born			▼ []	Test						
Roles, Levels & Security Group	os									
INCIDENT SECURITY LEVEL		INDEX SECURITY								
Animal Control	~	Level 2 - Condi	tional Acces	s to Data	~					
ROLES Q										
* OFFICER_SUPERVISOR * OF	FICER									
SECURITY GROUPS Q										
Click To Select										

5. Click into the **Roles** field and select *AGENCY_AD_HOC_REPORTING_TOOL* from the list.

Roles, Levels & Security Groups			
INCIDENT SECURITY LEVEL		INDEX SECURITY	
Animal Control	~	Level 2 - Conditional Access to Data	~
ROLES Q	N	χ.	
× OFFICER_SUPERVISOR × OFFICER	× agei	NCY_AD_HOC_REPORTING_TOOL	

6. Click Save to save the change.

Ad-Hoc Reporting

With appropriate permissions you can create Ad-Hoc reports and, using the Repository, you can group them into custom categories or topics.

Create an Ad-Hoc Report

The following example steps you through the process to create an Ad-Hoc report and group by reporting areas.

Use the following procedure to select an ad-hoc topic that contains the **Reporting Area** field.

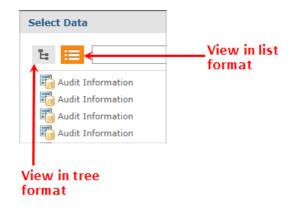
1. From the *Forms and Reports* page, click the **Launch** button under the <u>Ad-Hoc Report-ing</u> section.

ecords Management `	• Forms And Re	eports 🔻 Help 🔻	_		
	Forms And	Reports			
	Add / Sear	ch Custom Forms			
	Reports				
ms & Reports					
Q Search Test Forms	O Add Form		✓ Reports		🔑 Ad-Hoc Reporti
Search on forms entered throughout the application	Fill a new fo	orm by selecting one	Run Application Repo Custom Reports	orts and	Run Ad-Hoc Repo
Search	-Select	- •	View Reports		Launch
					1
InterAct 🔹 🕯 u	.ibrary View → Create →		STATE_OFFICER1	L Help Log Out	1
Recently Viewed Items			c Views your data for analysis and	Repor	ts nd format interactive
PermitTest1View	Ad Hoc view Report		ation. <u>View tutorial</u>	reports fr	rom existing Ad Hoc views.
ermit lest 1 Report	Ad Hoc view	Create	View list	<u>View tuto</u> Create	view list
estArrest Report	Report			create	view list
 Popular Resources 		Dashb	oards		
			related reports into custom I layouts. <u>View tutorial</u>		
 How-to videos 		daebboard			
 How-to videos How-to articles 		dashboard	ayouts. <u>view tutoriai</u>		

2. Click Create under Ad Hoc Views to open the Select Data window.

Ad Hoc Views Visualize your data for analysis and report creation. <u>View tutorial</u> Create View list	
Select Data	
ъ <mark>=</mark>	Q
Audit Information	~
audit Information	
Audit Information	
Audit Information	
Business Violations	
🕞 Business Violations	
Business Violations	
Calls For Service Topic	
Citation Data	•
OK Cancel	

Click on the appropriate icon to view the source in *Tree* format or in *List* format, respectively. The *List* format is selected by default.



- 3. To choose using the *Tre*e format:
 - a. Click + to the left of the Public folder to open the folder.
 - b. Click + to the left of Ad Hoc Components.

- c. Click + to the left of **Topics**.
- d. Select a topic.

Note: The following topics have been modified as follows:

• Calls for Service Topic has been modified as follows:

BEAT and SUB_BEAT is labeled Reporting Area.

Officer Information is labeled Primary Officer.

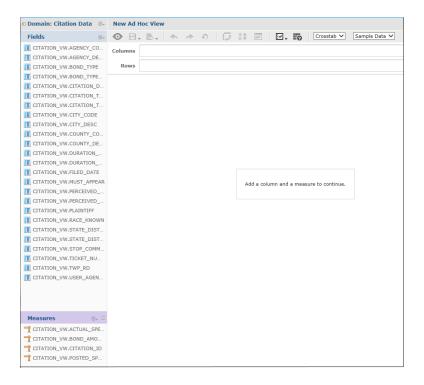
- Evidence Topic has the additional fields: Property Summary, Location Remarks, Reporting Area, and Status description.
- Field Arrest Charges Topic has the additional fields: Person Summary, Address Summary, Impound ID, Vehicle Seized, Vehicle Stored, Currency Seized, Currency Total, Discharge Date, Status Code, Status (to reference new columns), Case Number, Reporting Area, Longitude, and Latitude.
- Field Arrest Topic has the same additional fields as the Field Arrest Charges Topic (see above).
- Field Contact Topic has the additional fields: Notes, Address, Location Reporting Area and general summary information for Officer, Gang, Person, Organization and Vehicle.
- Incident Topic has the additional fields: Status (description), Address (summary), Reporting Area, Incident NIBR City, Incident County, Incident Township.
- Incident Offender Evidence Topic has the additional fields: Property Summary, Status (description), Address (summary), Location Remarks, Reporting Area, Location Agency, Incident NIBR City, Incident County, Incident Township.
- 4. To choose using the *List* format:
 - a. Scroll down and click on the source you want, then click the **Choose Data...** button to open the *Data Chooser* page.

	Choose Data			
	To move items in or out of selected fie	lds, double-click them, drag th	em, or use the direction buttons.	
Fields	Source		Selected Fields	
Pre-filters	► CITATION_VW			
Display				
Save as Topic		<		
		••		

- b. Click on items under the *Source* section then click the **right arrow** to move them into the *Selected Fields* section. Or **double-click** on selected *Source* items to move them automatically into the *Selected Fields* section.
- c. The **Pre-Filters**, **Display**, and **Save as Topic** buttons on the left become active. Click through each button to define the report.

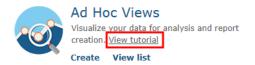
Data Chooser		
	Choose Data	
	To move items in or out of selec	ed fields, double-click them, drag them, or use the direction buttons.
Fields		
Pre-filters	Source	Selected Fields
Display		CITATION_VW
Save as Topic		•
Save as ropic		
		**
		44
		11

- **Pre-Filters**: Create filters to limit the data available in the editor. For example, you can limit the report to list citations with a specific citation type.
- **Display**: Change the display name for fields, re-order fields, and choose whether the fields are listed in groups or not.
- Save as Topic: Save the topic for later use.
- 5. Click OK to open the New Ad Hoc View page.



- 6. Click on titles on the left and drag and drop them into the Columns and Rows fields on the upper right.
- 7. Give your report a title in the designated text box.
- **8.** Use the tool bar to apply other functions. Hover your mouse over each icon on the tool bar for a description of its function.

For more information on Ad Hoc Views, click on the <u>View Tutorial</u> link.



Group Ad-Hoc Reports using the Repository

With Online RMS 11.7.0 and above, you can add folders, or categories, to the report repository to better group your Ad-Hoc reports. Previously, all new Ad-Hoc reports were grouped under *Other Reports* automatically for the users who have permissions to run reports.

The example below illustrates how Ad-Hoc reports can reside in their own categories, separate from *Other Reports*.

Menu for users with permissions to run reports



Numbers 2, 3, 4 in the above example contains Ad-Hoc reports that have been categorized outside of *Other Reports* (number 1).

Before Online RMS 11.7.0, Ad-Hoc reports would all reside under the Other Reports category. To create new categories, see "To Create new categories" below.

For more information on how users run reports, refer to the *Caliber Online RMS User Guide*.

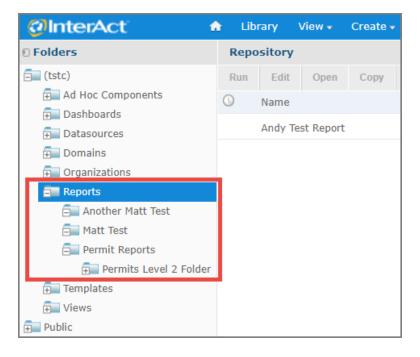
To Create new categories

1. From the *Forms and Reports* page, click the **Launch** button under the <u>Ad-Hoc Report-ing</u> section as shown in Step 1 under "Create an Ad-Hoc Report" on page 325.

2. Click View on the top menu, then **Repository** to open the Repository.

ØInterAct ♠ Library	View - Create -		
Home	Search Results		
	Repository		
Recently Viewed Items Messages			

3. Click + next to the **Reports** folder to expand subfolder categories that may exist, and repeat for any subfolders.



- 4. To create a new subfolder category, right-click on a folder then click Add Folder.
 - a. Enter the folder Name.
 - If you enter a unique name that does not exist, that new folder appears as its own category to the user, rather than under *Other Reports*. Refer to numbers 2 and 3 shown under "Menu for users with permissions to run reports " on the previous page.
 - If you wish to add Ad-Hoc reports to a category that already exists, enter that exact category name when creating the subfolder. *Permit Reports* is used in the example. Name the new subfolder *Permit Reports*, then Ad-Hoc reports added to that new subfolder will display under the existing *Permit Reports* category. Refer to number 4 shown under "Menu for users with permissions to run reports " on the previous page.
 - b. Optionally enter a **Description**.

- c. Click Add.
- **Note:** You cannot delete folders. Submit a support ticket and Caliber staff will delete the folder for you.

Chapter 20. Message Center

This module allows administrators to setup and maintain broadcast messages for users. From the *Administration Home* page, click the **Message Center** icon to open the *Message Center* page as shown. (Alternatively, select **Broadcast Messages** from the **Administration** drop down menu on the top navigation bar.)

System				System Adminis	tration	
G Manage System	Agencies (75	5)		SELECT SYSTEM)	~
Security				Miscellaneous		
# Roles (45)	Security Groups	s (10) Use	L ers (204)	Reports	Message Ce	enter
Maintenance				E Technical Nete	_	
®			8	Technical Note Log	5	
Permissions (2258)	Tables	Custo	om Forms			
æ						
Module Admin						
Administrative						
	â					
View Cache	Auditing					
					Go Back	dd Broadcast Mess
Broadcast Messages	Feature Communications				GO Dack	idd broadcast mess
broadcast messages	reature communications					
Enter Search Text		Subje	ect		~	Search Res
Subject ↓î Url	⊥î Priority⊥î	G↓î Attachments↓î	Message ↓↑ Description	Start Date ↓↑	End Date ↓†	Actions
Hack A Thon Voting	Urgent	Y N	Don't forget to vote for team	04/24/2018 12:02 PM CST	04/25/2019 12:02 PM CST	()

This page has two tabs: **Broadcast Messages** and **Feature Communication**. Depending upon roles, some users see only the **Broadcast Messages** tab; others see both.

- "Broadcast Messages" on the next page for more information and instructions on the first tab.
- "Feature Communications" on page 340 for information and instructions on the second tab.

Broadcast Messages

The **Broadcast Messages** tab is used to manage administrative messages to users. These messages relay information concerning mandatory meeting or firearms qualification notices as well as time sensitive information such as an Attempt to Locate notice for a stolen vehicle or reckless driver. Administrators set up these messages to be displayed to recipients according to their agency affiliation and/or role designation. Each message includes a start and end date/time. Administrators can select from various message types (informational, web sites, Amber Alerts, warnings, training tips, and so forth) and set a specific priority level for each message.

Use the Search fields to search for a specific message as follows:

- 1. Type a string of characters in the first **Search** text field.
- 2. Select from the drop-down list in the subject field to specify where the string can be found.
- 3. Click Search to return search results.

Add Message

Use the following procedure to set up and post a broadcast message.

 From the Broadcast Messages tab on the Message Center page, click the Add Broadcast Message button in the upper right corner to open the Add Broadcast Message page.

oadcast Messages / Add Broadcast Messa	ge		
Message Details			Go Back Save
бивлест		URL	
Message			
Message Type		Priority	
-Select- Login Notification	~	-Select-	~
AGENCY RECIPIENTS			Select All Remove All
Click To Select			
ROLE RECIPIENTS			Select All Remove All
Click To Select			
Start Date / Time		END DATE / TIME	
06/15/2020 0935	曲	06/16/2020 0935	曲
	Go Back	Save	

- 2. Enter a Subject.
- 3. Optionally enter a URL.
- 4. Select the **Global** checkbox if you want to send the notification to schemas rather than agency recipients.

Note: This option is only available to users with *c_admin* permissions.

a. A Schemas field appears. Select one or more Schemas.

GLOBAL	LOGIN NOTIFICATION
Z	
Schemas Q	
× ISP Test (TSTC)	🗙 Texas County, TX (TSTB)

5. Select the Login Notification checkbox if you want the notification to display to users upon login.

Message Type			Priority
Informational		~	Low
GLOBAL	Login Notification Z	Require Acknowledgment	
♥ × 6 G G	∃ 🖬 ← → Q 🖏	•	52
B I <u>U</u> <u>T</u> _x	≣ ∎ IE IE Styles	- Format -	Size - 🚺 - 🛕 - 🖹 🚊 🚊 Line Hei
Online RMS mainter maintenance window		AM - 1:15 AM CST on Su	inday, June 28, 2020. You will not have access to Online RMS during this

- a. When you select the **Login Notification** checkbox, a text editor opens, where you can enter a message and format the content.
- b. Select the **Require Acknowledgment** checkbox if you want to require users to acknowledge the message. If this option is checked, the message appears every time a user logs in, until the user acknowledges the message.
- 6. Select one or more Agency Recipients for your message by selecting from a list.

Note: If Global is checked, skip this step.

- 7. Select one or more Role Recipients.
- 8. Edit the **Start Date** and **Time** if needed (default setting is current date and time) and set an **End Date** and **Time**.

The message automatically expires on the specified end date and time, unless you delete it before that time, or you edit the message and extend the date and time.

9. Click **Save** to save the message. The *Edit Message* page opens with two tabs: *Message Details* and *Attachments*.

oadcast Messages / Ec	lit Broadcast Message				
				Gol	Back Save
Message Details Att	achments				
SUBJECT			URL		
Scheduled Maintenand	ce				
Message					
Online RMS will be una	available for 15 minutes	during an upcoming sc	hedule maintenance window TE	ST	
Message Type			Priority		
Informational		~	Low		~
Global	Login Notification 2	Require Acknowledgment Z			
$\mathbf{B} \mathbf{I} \underline{\mathbf{U}} \mathbf{I}_{\mathbf{x}} \mid \frac{1}{\varepsilon}$		- Format -	E 25 Size - ⊠ - <u>A</u> - E unday, June 28, 2020. You will not h		uring this
				Ir	mages 0/15
AGENCY RECIPIENTS				Select All	Remove All
× District 42, Versaille	25				
ROLE RECIPIENTS				Select All	Remove All
* CID_SUPERVISOR					
START DATE / TIME			END DATE / TIME		
06/15/2020 0957		曲	06/15/2020 1130		曲
		Go Bac	k Save		

- 10. Click Save.
- 11. Optionally click on the **Attachments** tab to upload an image file. Click **Add Attachment** to select a file and upload.

Note: The **Attachments** tab displays after you click **Save** when adding a new attachment.

Message Details	Attachments	Go Back Save
		O Add Attachment

For more information on uploading attachments, refer to "Attachments" on page 11.

12. Repeat Steps to broadcast another message or click **Go Back** to return to the *Message Center* page.

View Message

Use the following procedure to view a broadcast message.

- 1. Access the *Message Center* page. For more information, refer to "Message Center" on page 333.
- 2. Use the **Search** feature to display a specific message.
 - a. Type a string of characters in the first **Search** text field.
 - b. Select from the drop-down list in the subject field to specify where the string can be found.
 - c. Click **Search** to return search results.

Subject ↓î Url ↓	Î Priority↓î	G↓↑	Attachments↓↑	Message ↓↑ Description	Start Date ↓↑	End Date ↓↑	Actions
Reminder	Low	N	N	This is a reminder to turn in	03/04/2019 03:48 PM CST	03/05/2019 03:48 PM CST	201

3. Click is to the far right in the same row as the listing of the message to open a window similar to the one shown.

		Go Bac
Message Details		
SUBJECT	URL	
Test Broadcast Message		
Message		
A broadcast message demonstration.		
Message Type	Priority	
Informational	Low	
GLOBAL		
AGENCY RECIPIENTS		
Ang Police Department		
ROLE RECIPIENTS		
CID_SUPERVISOR		
START DATE / TIME	END DATE / TIME	
12/12/2019 1312	12/13/2019 1312	

4. Click Go Back to return to the Message Center page.

Edit Message

Use the following procedure edit a broadcast message.

1. From the Message Center page, click to the far left in the row listing the message you want to edit to open the Edit Message page. For more information on accessing the Message Center, refer to "Message Center" on page 333.

adcast Messages /	/ Edit Broadcast Messag	e			
Message Details	Attachments			Gol	Back Sav
UBJECT			URL		
Scheduled Mainter	nance				
lessage					
Online RMS will be	unavailable for 15 minu	tes during an upcoming so	hedule maintenance window Ti	ST	,
lessage Type			Priority		
Informational		~	Low		~
LOBAL	Login Notification Z	Require Acknowledgment 2			
	tenance is scheduled at 1		· Size - △ · ▲ · ■		uring this
				In	mages 0/15
GENCY RECIPIENTS				Select All	Remove A
× District 42, Vers	sailles				
OLE RECIPIENTS				Select All	Remove A
× CID_SUPERVISO	DR				
TART DATE / TIME			END DATE / TIME		
06/15/2020 0957		曲	06/15/2020 1130		曲
		Go Ba	save		

2. Make changes or upload attachments as needed. ("Add Message" on page 334 for more information.)

Note: To cancel changes, click **Go Back** at any time to return to the *Message Center* page.

3. Click Save to save changes and return to the Message Center page.

Delete Message

Use the following procedure to delete a broadcast message.

- On the Broadcast Messages tab of the Message Center page, locate the message you want to delete. For more information on access the Message Center, refer to " Message Center" on page 333.
- 2. Click to the far right in the same row to delete the message.

			_				Go Back	Add Broadcast Messag
Broadcast Messa	iges Featu	re Communications						
Enter Search T	ext			Subje	ct		~	Search Reset
Subject ↓î	Url	↓† Priority↓†	G↓↑	Attachments↓↑	Message ↓† Description	Start Date ↓↑	End Date ↓↑	Actions
Reminder		Low	N	Ν	This is a reminder to turn in	03/04/2019 03:48 PM CST	03/05/2019 03:48 PM CST	20
Hack A Thon Voting		Urgent	Y	Ν	Don't forget to vote for team	04/24/2018 12:02 PM CST	04/25/2019 12:02 PM CST	e

- 3. A Are you sure you want to delete this message?dialog box appears.
- 4. Select OK to delete or Cancel to return to messages without deleting.

Feature Communications

From the Message Center page, click the **Features Communications** tab to open the *Feature Communications* page as shown in the following example. For more information on accessing the Message Center, refer to "Message Center" on page 333.

Broadcast Messages	Feature Communications				Go Ba	
Show 10 + entries Search:						
Title î↓	Description	ît V	Version î↓	Start 1↓ Date	Actions	
Clear Your Cache	Please clear your browser cache if you are having problems.	1	10.16	11/03/2013	e i	
MY NEW TEST	testing here	1	11.0.0	01/20/2019	2	
NEW - Calls for Service Enhanced	* For those agencies using CFS (Calls for Service) we have implemented phase II enhancements as requested by users. Reach out to Elustice Operations if you have questions.	1	10.10.0.20110907	08/16/2011	6	
NEW - Changes to Incident Report Printing	* Additional user selections have been incorporated into this software release. You now have new options for photo's and redaction of data when printing your incident report.	1	10.10.0.20110907	08/16/2011	6	

This page is used to manage communications to users about new features and changes to existing features.

- "Add Feature Communication" below for instructions on adding a communication.
- "Edit Feature Communication" on the next page for instructions on editing a communication.
- Click in the **Actions** column to the far right of a listing to delete, then confirm deletion when prompted. (The listing no longer shows on the *Feature Communications* page.)

Add Feature Communication

Use the following procedure to add a communication.

1. From the *Feature Communications* page, click the **Add Communications** button to open the *Add Feature Communication* page as shown. For more information on access the Feature Communications page, refer to "Message Center" on page 333.

Caliber Public Safety

Add Feauture Communication	Go Back
Тпце	
VERSION Must be to a version in the app (e.g. 10.10, 10.9, 10.9.2). Click Help->About to get the current version.	
START DATE Message will be displayed until 15 days after this date.	
03/22/2019	
URL Optional. If entered, a link will be displayed when showing the message	
DESCRIPTION Limited to 200 characters. Keep theses entries brief! The URL is meant to describe it more in detail.	
Save	

- 2. After reading all instructions in red text, complete each of the required fields.
- 3. Click **Save** to save the message and return to the *Feature Communications* page with the new communication shown on the list.

Edit Feature Communication

Use the following procedure to edit a feature communication.

1. From the *Feature Communications* page, click in the **Actions** column to the far right of the listing you want to edit to open the *Add Feature Communication* page as shown. For more information on access the Feature Communications page, refer to "Message Center" on page 333.

Edit Feature Communication	Go Back
TITLE	
Clear Your Cache	
VERSION Must be to a version in the app (e.g. 10.10, 10.9, 10.9.2). Click Help->About to get the current version.	
10.16	
START DATE Message will be displayed until 15 days after this date.	
11/03/2013	#
URL Optional. If entered, a link will be displayed when showing the message	
DESCRIPTION Limited to 200 characters. Keep theses entries brief! The URL is meant to describe it more in detail.	
Please clear your browser cache if you are having problems.	
Update	

- 2. Make changes as need to the content of each field.
- 3. Click **Update** to save the changes.
- 4. Click **Go Back** to return to the *Feature Communications* page where your changes will show in the edited listing.

Chapter 21. Maintenance Values

Maintenance Values provides administrators with proper permissions to configure module behavior and restrictions for the agency or schema.

Examples:

- Determine if incidents always require approval, regardless of whether or not an offense exists.
- Allow agency to select specific charge violation related to an offense code.
- Enable level 2 approval for criminal complaints.
- Turn email notifications on or off at the application level.
- Set max file size for attachment uploads.
- Set number of days to increment case activity review date.
- CAD IP Address.
- Allow officers to select another agency within their organization when creating evidence.
- Enable fee collections of court papers.
- Require at least one narrative for a field arrest.
- Set a default warrant status when it is added to a field arrest.
- Display criminal complaints under recent activities that were submitted within a specified number of days.
- Require Off Duty and Service Interval when entering fuel/oil.
- Set max number of allowed pinned records per user, if different than the default of 50.
- Optionally require at least one evidence processing record, if applicable to your agency.
- Default chain of custody to print in ascending order.
- Require Judge on warrant creation.

Access Maintenance Values

There are two ways to access Maintenance Values, depending on your permissions:

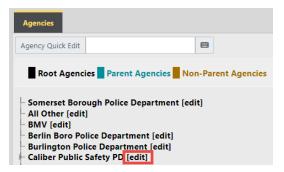
- Agency Profile Settings Tab.
 - Settings for a specific agency.
- Administration top menu.
 - Schema-level settings (all agencies).

Agency Profile Settings Tab

1. Click on the Administration top menu, then Agencies to open Agencies.



2. Click [edit] next to the appropriate agency to open the Agency Profile.



3. Click on the Agency Settings tab to display setting options, then click on Maint Values under the Other Tables section.

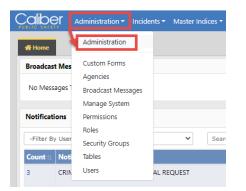
Select one of the links below:					
Assignment Setup		Activity Tables		Other Tables	
Assignment Shift Codes	0	Activity Codes	0	Evidence Locations Evidence E	
Assignment Codes	0	Activity Templates	0	Evidence Destinations Evidence Evidence Destinations Evidence Destinations	
🚔 Agency Vehicles	0	Image: Categories	0	 Reporting Areas 	
56 Agency Equipment	0			Source Towing Companies	
				👌 Judges	
Calls For Service Tables		County & Township Tables		Court Locations	
		county of township habits		➡ Offense Codes	
🚔 Disposition Codes	0	County Codes	0	Case Officer Groups	
• Call Type Codes	0	im Township Codes	0	Screening Questions	
Call Received Codes	0			Vehicle Location Codes	
				Narrative Templates	
				are Routing	
				😼 Search Options	
				🛱 Maint Values	
				🔎 API Keys	
				Configure Livescan	

4. The Agency Maint Valuestable opens.

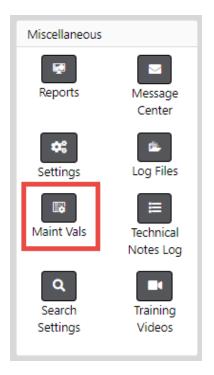
Agencies / Agency Settings / Agency Maint Values						
	Go Back Add Maint Value					
Show 10 ¢ entries Search:						
Keyword	1. Value 1.	Description	Effective 11 Date	End Date	Actions 11	
CID_CASE_ADMIN	Y	Have CID users create cases from approved incidents,	11/21/2011		6	
CP_PARTY_ROLE_REQUIRED	Y	Whether at least one role is required when adding a person/org to be served on a court paper. Values Y or N Only.	12/18/2014		6	
ENABLE_INC_LOCATION_CATEGORIES	Y	Y = Enable Common Place Name And Location Category (e.g. Clery) fields for the incident address page. N= disable	06/25/2015		6	

Administration Top Menu

1. Click on the Administration top menu, then click Administration on the dropdown list.



2. Click the Maint Vals button under the Miscellaneous section.



3. The Schema Maintenance Values table opens.

Schema Maintenance Values						ĺ
Show 10 🗢 entries	Search:					
Keyword ti	Value 11	Description 11	Effective 11 Date	End 11 Date	Actions	
ADDR_COMMON_NAME_FREE_TEXT	Ν	Y=Allow free-text entry for common place name on master address, N=Must select from pick list.	06/15/2015			2
ADDRESS_COLLAPSE	06/08/2020	Start date used in Address Collapse	09/24/2009			Ľ
ALWAYS_REQUIRE_LOC_CATEGORY	Ŷ	Y or N. When enabled, will require a common place category even if no common place names are available. Only applies when ENABLE_INC_LOCATION_CATEGORIES is enabled	08/02/2016			Ø
APPROVAL_REQ	Y	Determines if incidents require approval all the time regardless if offenses exist or not.	01/01/2010			Ø
ARREST_CHARGE_CODES	Y	Allow agency to select specific charge violation related to an Offense code	04/02/2010			ľ

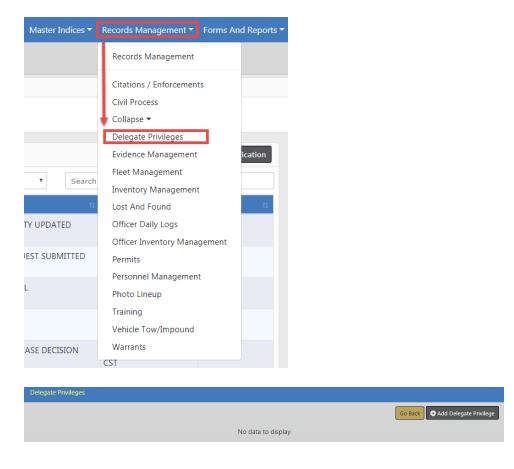
Chapter 22. Delegate Privileges

The Delegate Privileges feature allows users with certain administrative functions to transfer their privileges (roles) to other RMS users. For example, a user going away on vacation for two weeks might delegate certain of their roles to another user during that period of time. The next time the delegated user logs into the application, he will have the privileges associated with the delegated roles.

- It is up to the agency to decide whether to use this functionality or not.
- A user is only able to delegate the privileges (roles) that have been assigned to them.

Use the following procedure to delegate privileges.

1. Click the **Records Management** label on the top navigation bar, then click the **Delegate Privileges** option to open the *Delegate Privilege* page as shown.



2. Click the Add Delegate Privilege button in the upper right corner to display the Add Delegate Privilege page.

				Go Back
Role		EXPIRATION DATE		
-Select-	T		曲	
Users Q				
Click To Select				

- 3. Select the **Role** for which you which to delegate privileges. (It may already appear in the field by default, but can be changed.)
- 4. Enter the Expiration Date.
- 5. Select the **User** by entering in the user's name then selecting the appropriate user(s)

from the displayed list, or click on the search icon search to open the search window.

6. Click **Delegate** to delegate the privileges associated with the specified role to the specified users and redisplay the *Delegate Privilege* page with the delegation listed in the grid.

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